

Clemson University



3 1604 019 750 274

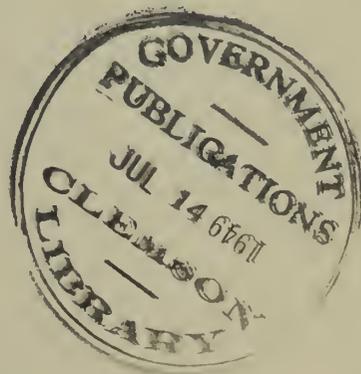
U.S. Travel

A Digest • UNITED STATES TRAVEL DIVISION

NATIONAL PARK SERVICE • DEPARTMENT OF THE INTERIOR • WASHINGTON, D. C.

Contents

	Page
FOREWORD	v
PART I	
Convention statistics and available statistics on travel during 1948, by States and Territories:	
Convention statistics	1
Statistics reported from the States and Territories	2
PART II	
The problem of measuring the amount and significance of the recreational travel movement in the United States	
General statement	19
Need for accurate data	21
A review of attempts to gather travel statistics on a Nation-wide basis	22
A plan for collecting travel statistics by means of the 1950 population census	24



Foreword

IT IS GENERALLY BELIEVED that domestic travel, and the business created by it, is the third largest factor in our national economy. However, because of inadequate data, it is difficult to prove this popular theory.

The following collection of information about domestic travel in 1948 reflects this situation. It is an informal presentation. It consists of raw material rather than an analysis or projection. In spite of its nonconclusive character, it is felt to have interest for two reasons. First, it represents the only Nation-wide compilation of its type on the subject. Second, it reveals the need for arriving at a standard plan for gathering, compiling, and evaluating the volume and value of domestic travel.

In addition to presenting the available information received through the cooperation of State, regional, and private travel organizations, this digest includes a summary of a plan for gathering Nation-wide travel statistics which was submitted to the Bureau of the Census by the United States Travel Division. Although the Bureau of the Census did not find it possible to incorporate this suggestion in the 1950 census, it may serve as a starting point for the creation of a basic pattern for the collection of domestic travel statistics in the future. Material included in the plan is based on suggestions and recommendations originally presented by Don Thomas, managing director of the All-Year Club of Southern California, Ltd.

We submit this amalgam of information for whatever value it may possess. We feel that it forcefully illustrates the need for cooperation and planning. We hope that the plan submitted to the Bureau of the Census will provoke creative thinking and hasten the day when reports of this nature will furnish conclusive evidence that domestic travel is indeed the third largest factor in the economy of the United States.

PART I

Convention Statistics and Available Statistics on Travel During 1948, by States and Territories

CONVENTION STATISTICS

ON THE BASIS of the figures on individual delegate expenditure established in the foregoing report, the annual gross expenditure of the American convention delegate is \$853,056,256.

This \$853,056,256 is spent by 9,105,094 delegates attending 17,175 separate conventions, consisting of 4,741 National and regional, and 12,434 State meetings.

Coordinating its action with the Boning survey¹ on the individual delegate expenditure, the headquarters office of International Association of Convention Bureaus has completed a thorough survey on the number of conventions held annually and their attendance. The National and regional totals were taken from the master files of the organization, undoubtedly the most complete and authentic records in existence, accumulated and corrected through many years from the files of the leading convention bureaus of the country.

Totals on the conventions held in the 48 States and in the Provinces of Canada were extracted from the files of these same bureaus dealing with meetings in their respective States. In those States where no organized convention bureaus exist figures were obtained through State authori-

ties, State chambers of commerce, and similar sources.

This physical counting of the entire convention field, in the matter of number of conventions and of delegate attendance, is the first authentic effort of its kind on record in the history of convention-holding in America.

Using the percentages of distribution of the delegate dollar, as established by the survey, the gross \$853,056,256 was divided as follows:

Hotel—rooms and incidentals__	\$216,761,594.65
Hotel restaurants_____	117,209,929.57
Other restaurants_____	114,480,149.56
Beverages _____	56,932,974.53
Retail stores_____	170,201,784.20
Local transportation_____	27,596,369.88
Theater _____	13,503,880.53
Sightseeing_____	9,076,518.56
Night clubs, etc_____	54,262,908.44
Car, oil and gas service_____	17,982,425.88
Other items_____	55,022,128.51

International Association of Convention
Bureaus,
910 Dixie Terminal Building,
Cincinnati 2, Ohio.
Adolph O. Frey,
President.

¹ Copies available on request from IACB.

STATISTICS REPORTED FROM THE STATES AND TERRITORIES

ALABAMA

Information not available.

ALASKA

No travel survey. During 1948, 4,462 cars and 11,170 persons entered Alaska over the Alaska Highway at Tok Junction. In the same period 3,092 cars and 7,514 persons left the Territory.

Office of Highway Engineer,
Territory of Alaska,
Juneau, Alaska.
Frank A. Metcalf,
Territorial Highway Engineer.

ARIZONA

Based on a two-page questionnaire distributed by Valley of the Sun tourist establishments:

1. A majority of the Valley of the Sun's winter visitors came from California, Illinois, Michigan, New York, Wisconsin, Ohio, and Indiana in that order. Principal cities of origin: Los Angeles, Chicago, Detroit, Cleveland, Indianapolis, and Denver.

2. Average length of stay in Valley of the Sun—5 weeks.

3. A substantial increase of guests from the Pacific Northwest was recorded by 16 percent of the firms in the survey.

Of those recording increases from the Pacific Northwest, the gain in tourist traffic from that area was an average of 45 percent.

Phoenix Chamber of Commerce,
Phoenix, Ariz.

J. Robert Burns,
Director of Publicity.

ARKANSAS

Information not available.

CALIFORNIA

Official figures taken at California Border Stations by State Agricultural Department.

Month	Out-of-State cars only	Passengers carried by cars	Passengers carried by buses
January.....	72, 536	190, 482	76, 577
February.....	67, 450	174, 760	63, 693
March.....	64, 308	165, 738	67, 936
April.....	60, 409	153, 104	68, 925
May.....	76, 822	199, 296	83, 743
June.....	106, 800	299, 795	100, 238
July.....	120, 812	350, 390	118, 815
August.....	123, 123	362, 511	121, 065
September.....	89, 185	236, 933	102, 262
October.....	76, 277	195, 738	89, 377
November.....	72, 703	188, 759	79, 755
December.....	83, 016	226, 974	95, 142
Total.....	1, 013, 441	2, 744, 480	1, 067, 628

California Mission Trails, Ltd.
607 South Hill Street,
Los Angeles 14, Calif.
Ray Hewitt,
Secretary-Manager.



In 1948 there were 1,710,356 out-of-State tourists in the region of central and northern California. They spent \$111,515,211. These figures are 0.41 and 9.4 percent respectively below the corresponding figures for 1947.

Of these tourists, 940,696 visited the San Francisco Bay area and spent \$42,760,279. These figures are 8.7 and 17 percent respectively below the corresponding figures for 1947.

In addition there were 136,828 persons in this region on "business and pleasure" trips who spent an additional \$10,262,100.

The average tourist stay in the region was 8 days, the average expenditure \$8.15 a day, making the average tourist expenditure here \$65.20.

The average tourist stay in the San Francisco Bay area was 4.8 days, the average expenditure

\$9.47 a day, making the average tourist expenditure here \$35.46.

Californians, Inc.,
703 Market Street,
San Francisco 3, Calif.
John J. Cuddy,
Managing Director.



The economic importance of the travel and vacation industry is clearly demonstrated by the fact that tourist business is now southern California's second largest source of outside income, exceeded only by aircraft manufacturing. Petroleum and motion pictures rank third and fourth after tourism in the southern half of this State.

Three million tourists last year spent \$457,838,000 in the region with 23 cents of every tourist dollar going for food, 19 cents for lodging, 12 cents for auto transportation and 13 cents for clothing.

These are some of the highlights of the most comprehensive regional tourist survey since the war, just completed under the auspices of the All-Year Club of Southern California.

The survey was carried on throughout most of last year by the Eberle Economic Service, a private research organization with long experience in fiscal studies for governmental agencies and private business.

The survey covered not only the importance of tourist dollars, and just how they are expended, but also their subsequent influence on the region's economy. The study was inspired by the fact that the All-Year Club's first factual check, made 22 years ago, disclosed some glaring misconceptions about the state of the tourist business.

It had been presumed that southern California then had about 1,500,000 tourists a year who spent around \$500,000,000. But the survey revealed only one-third as many tourists and less than half as much spending.

This time, estimates turned out to be not so far off, and to have been on the conservative side, especially regarding the importance of the tourist business. The survey, the first since 1930, dealt specifically with income from out of the State, on the premise that the mere circulation of money within the region did not fundamentally improve its economic position. Here is the break-down:

Aircraft manufacturing	\$490,473,000
Tourism	457,838,000
Petroleum	428,000,000
Motion pictures	178,569,000
Apparel manufacturing	163,688,000

Citrus	\$131,428,523
Furniture manufacturing	79,784,000

Tourist expenditures were traced as follows:

Food	106,218,000
Accommodations	87,446,000
Gasoline, oil, and auto	56,773,000
Clothing	60,435,000
Public utilities (including local transportation)	47,157,000
Recreation	50,362,000
Laundry and dry cleaning	9,157,000
Professional and personal services	18,314,000
Drugs and sundries	21,976,000

Tourist spending for clothing was shown to top even expenditures for recreation, taking 13.2 cents of each tourist dollar, against 11 cents for the latter.

The most popular tourist recreation in southern California, the survey indicated, was going to the movies, on which visitors spend \$14,193,000, or nearly 25 percent of their total outlay for vacation amusements.

Next came the spectator sports—baseball, football, hockey, and horse and auto racing. The third ranking diversion was attendance at plays, concerts, and night clubs, of which southern California has a good supply.

Participation sports came fourth—golf, bowling, billiards, riding, skating, boating, bicycling, hunting, and camping.

Tourists spent \$5,952,000 on photography. Expenditures for books, magazines, and newspapers were the last and smallest item on the recreational list, amounting to \$2,289,000.

Of \$106,218,000 spent for food, nearly half went to restaurants and one-third to grocery and food stores.

Women tourists buy three times as much clothing as men in southern California, the survey showed, putting out \$35,712,000 last year, against \$11,904,000 for the male wardrobe. Expenditures of \$7,783,000 for shoes (both men's and women's) and \$5,036,000 for jewelry, watches, and repairs made up the rest of the total \$60,435,000 for apparel.

Tourist spending supports capital investments totaling \$761,548,000, according to the survey, the largest item of which is \$400,608,000 in the land, building and equipment of hotels, motels, and other accommodations.

Tracing tourist money after it had been spent to see where it went in the economic stream, the survey found that \$208,056,060, nearly half the

total, was passed on by tourist enterprises to wholesalers and manufacturers for supplies. Another \$107,001,000 went into pay rolls. Other second-round destinations were as follows:

Rent	\$29,185,000
Advertising.....	7,621,000
Depreciation.....	23,576,000
Property taxes.....	5,957,470
Insurance.....	3,577,470
Interest on capital.....	4,350,000
Office supplies.....	3,186,000
Heat, light, and power.....	9,481,000
Telephone and telegraph.....	4,350,000
Legal expenses.....	1,239,000
Laundry and dry cleaning.....	4,611,000
Profits and all other items.....	45,421,000

Finally, the analysis showed, tourist spending was the basis for \$7,615,000 in real and personal property tax payments during the year, \$6,015,000 in retail sales tax payments and \$5,632,000 in gasoline taxes.

All-Year Club of Southern
California, Ltd.,
629 South Hill Street,
Los Angeles, Calif.
Don Thomas,
Manager.

Colorado Publicity Committee,
Capitol Building,
Denver, Colo.
Lewis R. Cobb,
Director.

Conventions brought a total of 115,450 visitors to San Francisco for an average stay of 4.68 days and an average expenditure of \$24.15 per day. The \$13,048,389.90 they left behind to circulate among San Franciscans at a velocity of 26 times a year accomplished perhaps \$100,000,000 worth of trade before these dollars circulated out of the community.

San Francisco Convention and Visitors
Bureau,
Room 200, Civic Auditorium,
San Francisco, Calif.
Walter G. Swanson,
Vice President and General Manager.

COLORADO

Questionnaires were sent to 90 chambers of commerce throughout the State of Colorado, asking each one to give the percentage up or down from last year, of tourist business (in terms of dollars) for each of three periods—June, midsummer (July and August), and September. Received 33 responses representing almost exactly two-thirds of tourist areas. Returns indicated that June business was down 2.08 percent; midsummer business was down 4.63 percent; and September business

was down 2.21 percent. These figures were then analyzed upon the basis of relative density of out-of-State travel, and it was determined that the season as a whole was down 3.62 percent from 1947. The most conservative estimate of 1947 business was \$135,000,000 and this drop amounted to \$4,887,000, placing 1948 business at \$130,114,000.

Data on the number of travelers has not been as thoroughly analyzed, but, from all appearances, and from indices such as national park, forest and monument registrations, the total number of tourists visiting the State this year is up about 10 percent from 1947, for a total of approximately 2,500,000 persons. Stays were shorter, and spending—in spite of a little increase in prices—was much more careful—hence the phenomenon of a 10 percent increase in the number of visitors paired with a 3.62 percent reduction in grand total spending.

Every dollar spent by the Denver Convention and Visitors Bureau in advertising the tourist attractions of the Denver area yields local merchants direct, traceable returns of \$283.24, a Nationwide survey conducted by the bureau during the closing weeks of the year shows.

It is shown by the survey that of those who write to the bureau asking vacation and travel information, 52.6 percent actually came to Colorado. Of this number 9 out of 10 said they visited Denver. There was an average of 3.01 persons in these parties of tourists, and they remained in this area an average of 9.41 days.

Among other things, the bureau now knows that this year the cost of bringing to Colorado a 3-person, 9-day party destined to spend an average of \$283.24 is only \$1.01, about 34 cents per person.

If the more than 4,000 persons queried in the bureau's post-card survey represent an accurate cross section of those responding to the bureau's advertising, it is indicated that the expenditure of \$6,555,288 by 69,663 tourists during the 1948 summer months could be traced directly to the bureau's national advertising campaign.

Denver Convention and Visitors
Bureau,
Denver, Colo.

CONNECTICUT

The approximate amount of business brought to Connecticut by advertising, as measured by reports from a typical cross section of vacation travelers, was slightly over half a million dollars in 1948. In 1946 (which was our best year) it was more than a million and a half dollars.

Each year we make a careful statistical estimate of the amount spent by vacationists for each dollar spent in advertising. The estimated figure for 1948 was \$109.

State of Connecticut Development
Commission,
State Office Building,
Hartford, Conn.
Don Parry,
Director, Public Relations Division.



STATE PARK ATTENDANCE RECORDS SEPT. 1, 1947- AUG. 31, 1948

<i>Park</i>	<i>Total</i>
Sherwood Island.....	182, 844
Hurd Park.....	31, 875
Mount Tom.....	63, 409
Mashamoquet Brook.....	64, 010
Macedonia Brook.....	22, 420
Wharton Brook.....	71, 939
Kent Falls.....	65, 728
Hammonasset.....	830, 824
Devil's Hopyard.....	37, 909
Lake Waramaug.....	36, 065
Sleeping Giant.....	73, 008
Fort Shantok.....	45, 044
Squantz Pond.....	142, 002
Black Rock.....	65, 624
Housatonic Meadows.....	69, 697
Indian Well.....	207, 066
Rocky Neck.....	217, 368
Gillette Castle.....	55, 869
Hopeville Pond.....	24, 489
All other parks.....	58, 162
Total.....	2, 365, 352

State Park and Forest Commission,
165 Capitol Avenue,
Post Office Box 1558,
Hartford, Conn.

DELAWARE

Information not available.

DISTRICT OF COLUMBIA

Conventions and tourist trade in Washington amounted to 60 million dollars last year.

The estimated total, based on an actual survey of visitors' outlays, represents an all-time high. Number of conventions and attendance also reached a new record here last year.

The Nation's Capital attracted 230 conventions last year with an attendance of 119,000 persons, according to the survey. Conventioneers spent 12 million dollars in 1948, against \$7,575,000 in 1947. Another 48 million dollars poured out of tourists' pockets in 1948.

Greater National Capital Committee,
Washington Board of Trade,
Star Building,
Washington 4, D. C.

FLORIDA

Information not available.

GEORGIA

	<i>Annually</i>
Number of out-of-State passenger cars entering State.....	4,486, 135
Number of out-of-State passenger cars entering State on pleasure.....	1, 601, 985
Number of out-of-State passenger cars entering State on business.....	1, 795, 070
Number of out-of-State passenger cars entering State on work.....	1, 215, 450
Number of persons traveling on pleasure in out-of-State cars ¹	3, 908, 785
Number of persons traveling on business in out-of-State cars.....	2, 692, 605
Amount of money spent by persons on pleasure trips.....	\$62, 540, 560
\$5 per day for 2 days in 1939 and 1947; \$8 per day for 2 days in 1948.	
Amount of money spent by persons on business trips.....	43, 081, 630
\$7.50 per day for 1.6 days in 1939 and 1947; \$10 per day for 1.6 days in 1948.	
Total amount spent by visitors in the State.....	105, 622, 240

¹ Recent studies indicate that number of persons in out-of-State cars on tourist routes was 2.44 persons per car.

Agricultural and Industrial Development
Board of Georgia,
100 State Capitol,
Atlanta 3, Ga.
R. V. Connerat,
Executive Director.

From records of one hotel in Columbus, Ga., for the first 6 months period of 1948, there were 7,521 tourist registrations. From observation and estimates it would be reasonable to assume that twice this many tourists actually spent 1 night in Columbus, Ga., or we can say 15,000. These represented registrations from 43 individual States of the 48. In comparing the registrations by States, it is noted that approximately 75 percent of these have traveled over U. S. Highway No. 27, either north or south.

U. S. Highway No. 27,
Association, Inc.,
Columbus, Ga.
O. L. Betts, Jr.,
President.

Hawaii Visitors Bureau,
Dillingham Building,
Honolulu, T. H.
Mark Egan,
Executive Secretary.

IDAHO

Vacation traffic in Idaho during 1948 brought an estimated \$57,396,744—an increase of nearly 4 million dollars over 1947 travel income figures.

The estimate was based on Idaho's gasoline tax figures, motorists paying \$10,579,674 in gas tax in 1948 compared with \$9,770,268 during 1947. Figuring according to highway surveys that 21 percent of Idaho's traffic is of out-of-State origin, the 57 million dollars was derived from a ratio with the 1939 gasoline tax and the 1939 tourist income, the last year official Idaho figures were compiled.

Tourists in Idaho contributed \$167,873 more in gasoline tax during 1948 than 1947. The increase is \$67,873 more in gasoline tax money alone than Idaho is spending in 2 years on its tourist attraction program.

Leading States of origin were Idaho's western neighbors of Washington, California, Utah, and Oregon. The top 10 States, with numbers, were Washington 589, California 525, Utah 339, Oregon 297, Montana 160, Canada 142, Illinois 129, Nebraska 106, Kansas 104, and Iowa 91.

Despite travelers spending only 2 days of the total average 18½-day round trip in Idaho, the State's travel industry annually amounts to an estimated 53 million dollars.

A check on foreign traffic in Idaho this summer at three different locations by the Idaho highway planning survey revealed that 70 percent of the out-of-State cars stopped were on vacation. Interviewers learned tourists were driving an over-all average of 3,500 miles during an average 18-day vacation.

State Board of Publicity,
443 Yates Building,
Boise, Idaho.
Tom Cunning.

ILLINOIS

Attendance figures for 1948 up to November 1 for the Illinois State Parks and Memorials was 6,394,753 and indications are that final figures for the year will be close to the 7-million mark. This

HAWAII

SUMMARY FOR 1948

	Passengers to Hawaii	Tourist factor (percent)	Tourists
Matson Navigation Co.-----	¹ 17, 400	³ 60	¹ 10, 440
United Air Lines-----	15, 000	⁴ 66	9, 900
Pan American World Air-----	² 34, 623	⁵ 51	17, 657
Others (APL, Army) ⁶ -----			⁶ 7, 567
Total-----			45, 564

¹ Figure does not include loss of tourists through strikes----- *3, 600

⁸ Lurline sailings canceled; 750 passengers each; 60 percent tourist factor.

Net total----- 41, 964

² Figure does not include any trans-Pacific transient stop-overs.

³ Estimate by the Matson Co.

⁴ Based on 838 UAL questionnaires completed by passengers.

⁵ Based on questionnaires completed by Pan American passengers.

⁶ Included with APL estimates of debarking Hawaiian passengers with 50 percent tourist factor, the Hawaii Visitors Bureau has added 5,567 Army tourists by this calculation: 37,116 stopped over 1½ days during 1948. Ten days is average for a tourist. Reducing this figure to 1½ days or taking 15 percent, we arrive at 5,567 tourist equivalent.

DIRECT TOURIST EXPENDITURES IN 1948 WITHIN THE TERRITORY OF HAWAII

Percent	Where spent by tourist	Total
28	Hotels on all islands-----	\$9, 410, 960
19	Retail stores of all kinds-----	6, 662, 959
20	Restaurants-----	6, 329, 811
8. 83	Transportation within Hawaii-----	2, 941, 696
10. 27	Entertainment of all kinds-----	3, 421, 429
8. 28	Beverages by bottle and bars-----	2, 818, 465
2. 70	Services (barbers, laundries, etc.)-----	899, 499
2. 72	Incidentals-----	906, 162
100	Total-----	33, 314, 798

is a big gain over 1947 when visitors numbered slightly over 5,100,000.

Department of Public Works and
Buildings,
Division of Parks and Memorials,
604 Armory Building,
Springfield, Ill.
George W. Williams,
Superintendent.



We have attempted many times to estimate Chicago's tourist and vacationist trade, but have never come up with what we would consider satisfactory results.

Estimates we have made at various times varied from 50,000 to 100,000 visitors per day, which is quite a difference. We arbitrarily use the figure 20 million visitors a year, and we point out that approximately 1 million of these are convention delegates.

The Chicago Association of Commerce
and Industry,
1 North La Salle Street,
Chicago 2, Ill.
P. W. Kunning,
Domestic Commerce Department.



Not only has the number of meetings increased substantially this year, but also the amount of dollars poured into local business channels by out-of-town convention visitors. Approximately \$82,807,320 was spent by delegates during the first 8 months of 1948. Total expenditures of slightly more than \$81,000,000 were reported during the entire year of 1947.

From "There's Only One Chicago,"
October 1948.
Published by Chicago Convention
Bureau, Inc.,
33 North La Salle Street,
Chicago 2, Ill.
I. S. Anoff,
President.

INDIANA

Information not available.

IOWA

Information not available.

KANSAS

Information not available.

KENTUCKY

Out-of-State tourists spent an estimated \$184,160,400 in Kentucky in 1948.

The 1948 figure shows an increase of 13.8 percent over the 1947 total of \$161,774,152.

Pleasure cars bearing out-of-State licenses traveled a total of 713,800,203 miles in the State during the year. The tourists who used these cars, spent a total of 10,707,000 days in Kentucky. A break-down of the \$184,160,400 tourist expenditure (according to percentages determined in a recent survey by the American Automobile Association) reveals that 28.7 percent or \$52,854,034 went to garages, automobile accessory stores, and filling stations for automobile services of all kinds; 20.5 percent, or \$37,742,882, to restaurants and food establishments for meals; 17.3 percent, or \$31,859,749, to hotels, tourist courts, and tourist homes for room accommodations; 8.5 percent, or \$15,653,634, for amusements of all kinds, parks, theaters, sporting events, etc.; and 25 percent, or \$46,040,100, for purchases of merchandise in retail stores.

Commonwealth of Kentucky,
Division of Public Information,
Department of Highways,
Frankfort, Ky.

Vear Mann,
Director.

LOUISIANA

Almost every type of business profited from a record 100 million dollar tourist expenditure in Louisiana during 1948, according to the Tourist Bureau of the Department of Commerce and Industry.

This estimate of Louisiana tourist spending was based in part on a break-down of the American tourist dollar published recently in Resort Management.

Road stands and wayside restaurants got 5 million dollars; amusements and theaters 9 million dollars; food stores and restaurants got 22 million dollars; hotels, tourist camps, and rooming houses got 17 million dollars; gasoline and oil stations and automotive repairs accounted for 12 million dollars, while 7 million was spent for rail, boat, bus, air, and other transportation in Louisiana and

the last 3 million of the 100 million dollars estimated 1948 tourist spending went for incidentals.

Louisiana News Digest, February 1949.
Published by Louisiana Tourist Bureau,
2301 State Capitol,
Baton Rouge 4, La.
G. C. Ducote,
Director.

MAINE

Use of the State parks and memorials in Maine during the calendar year 1948:

Day use—133,809. Camper nights: tents, 25,702; trailers, 3,127; shelters, 1,141; organized camping, 15,759.

State Park Commission,
Augusta, Maine.
Charles P. Bradford,
Superintendent.



The 1948 travel season was about 5 percent below 1947. Total vacation business estimated at \$110,000,000. More people came but spent less.

Maine Development Commission,
State House,
Augusta, Maine.
Everett F. Greaton,
Executive Director.

MARYLAND

Information not available.

MASSACHUSETTS

Annual business survey (November 8, 1948) reported improvement over 1947 in 44 percent of replies from 35 cities and towns in Pioneer Valley region. Total improvement reported was 17.7 percent over 1947. Declines were shown by 22 percent of the answers, while 21.3 percent held their own in comparison with the year before.

Pioneer Valley Association,
Northampton, Mass.
Elizabeth Shoemaker,
Executive Director.

MICHIGAN

1948 was a good tourist year. Trunk-line traffic was up 9 percent. Straits of Mackinac traffic

showed a 10 percent increase. Bus traffic to resorts clocked a 5 percent jump while railroad passenger travel showed a 10 to 12 percent increase. State park attendance went up 3 percent while camp permits there increased 14 percent.

A survey of the effectiveness of advertising through a New York readership research service yielded valuable data. A questionnaire was mailed to 9,000 of a total of more than 45,000 persons mailing in advertisement coupons. Twelve percent replied and 62 percent of that total stated that they had vacationed in the State. Based on these returns and an estimate of an average of 3 persons to a party, paid advertising probably netted 84,000 visitors.

Average expenditure per group of three, based on the questionnaire, was \$234.43, or \$128 for every dollar spent in advertising. Other details about the typical Michigan visitor include the following: A vacation stay of 12.3 days; 92 percent come by private automobile; an average yearly income of \$3,435; 21 percent decided where to spend vacation during May.

Michigan Tourist Council,
114 South Walnut Street,
Lansing 1, Mich.
Robert J. Furlong,
Administrative Secretary.

MINNESOTA

Through a private Minneapolis research agency, employing both personal interviews and mail questionnaires, the Department of Business Research and Development prepared an interpretive survey of the State's vacation industry, June through September, only.

Facts about the typical vacationist revealed that, although citizens of the State are the largest single group, the total out-of-State visitors about equal Minnesota registrations at vacation facilities. Illinois and Iowa account for 27 and 21 percent, respectively, of out-of-Staters. Vacation parties average 3.5 persons. Average expenditure for the 1948 Minnesota vacation was \$225.70. The vacation dollar was spread as follows: \$0.42 to resorts; \$0.13 for food, unless included in resort bill; \$0.10 for transportation; \$0.098 to retail stores; \$0.084 for sport and recreation; \$0.088 for miscellaneous; \$0.079 for food other than at resorts.

ESTIMATED TOTAL VACATIONISTS' EXPENDITURES, 1948

Total bill at all Minnesota resorts.....	\$43, 428, 000
Total cost of food at resort, unless included in rate.....	13, 442, 000
Total cost of transportation.....	10, 340, 000
Retail store expenditures.....	10, 133, 200
Sports and recreation expenditures.....	8, 685, 600
Food at other places than resorts.....	8, 168, 600
Miscellaneous.....	9, 202, 600

Estimated total vacation expenditures,
1948..... 103, 400, 000

As for a break-down by income groups the survey reports as follows:

VACATIONISTS' INCOME

Income bracket	All vacationists (percent)	Minnesota residents (percent)	Nonresi- dents (percent)
Less than \$2,000.....	6	7	3
\$2,000 to \$3,500.....	28	34	19
\$3,500 to \$5,000.....	24	23	25
\$5,000 to \$7,500.....	20	19	23
\$7,500 to \$10,000.....	8	6	10
\$10,000 to \$15,000.....	6	5	10
\$15,000 to \$20,000.....	3	2	5
\$20,000 to \$25,000.....	2	1	2
Over \$25,000.....	3	3	3

Nine out of every ten parties chose July and August. The preference is so marked that it clearly indicates that efforts be intensified to spread the vacation through May, June, September, and October as recommended by the Department in its summary. Average length of stay was 12 to 13 days. Eight out of ten stated they were influenced in their choice of Minnesota by friends' advice or by business associates.

Dept. of Business Research
and Development,
State Capitol,
St. Paul, Minn.

MISSISSIPPI

Information not available.

MISSOURI

A questionnaire sent to 212 resort, hotel, and tourist court operators at the end of fall, 1948, disclosed their belief that 1948 produced a travel business 10.1 percent better than 1947, that food prices were up 12 percent and accommodations 4.2 percent.

Using sales-tax collections from these same sources and from restaurants for the first three-quarters of 1948 and October, November, and December, 1947, the State Division of Resources and Development arrived at an estimate of \$198,600,000 as representing the 1948 tourist business in the State. This compares favorably with the 1946 estimate of \$169,000,000, and the similar figure for 1947.

Another questionnaire, sent out by the division to 4,050 of the 72,902 persons who requested Missouri literature, yielded interesting results. Replies showed that 54.7 percent actually visited Missouri in 1948. Average time spent was 10 days. Average daily expenditure per person was \$7.51. There were 3.5 persons in the average group coming to Missouri. Answering the question, What influenced you to come to Missouri? 22.6 percent (the majority) gave advertising as the reason.

Missouri Division of Resources
and Development,
State Office Building,
Jefferson City, Mo.
H. H. Mobley,
Director.

MONTANA

TOURIST AUTOMOBILE TRAVEL IN MONTANA, 1948

Actual tabulation

Cars.....	185, 366
Increase over 1947.....	5%
Number of occupants per car.....	3. 1
Total number occupants.....	574, 435
Number of days spent in State per car.....	5
Money spent per person per day.....	\$6. 40
Money spent per car per stay.....	\$99. 20
Income from cars actually stopped.....	\$18, 388, 197
Value of increase in travel.....	\$919, 409

Each car traveled 605 miles within the State.

The number of days spent, number of occupants, and the amount of money spent is derived from 21,215 cards returned to date. As you will note, these figures are somewhat lower than last year, when we merely looked into the crystal ball. This year, with the return cards we have a better knowledge of what the industry was worth to the State.

Expansion to 24-hour basis, 12 months a year:

Number of cars.....	504, 566
Number of visitors.....	1, 564, 255
Amount of money spent.....	\$50, 066, 160
Value of 5-percent increase in automobile travel.....	\$2, 503, 308

The first 2 weeks in the season were very slow, accounting for only 10 percent of the total travel, against last year's 19.8 percent. On the other hand, the last 2 weeks showed an increase, accounting for 9.2 percent against 3.6 percent last year. Of those who indicated what had brought them to the State, some 23 percent stated advertising.

Montana Highway Commission,
Helena, Mont.

Rad Maxey,
Advertising Director.

NEBRASKA

Information not available.

NEVADA

The 1948 tabulation of annual traffic census, representing the average 16-hour travel (6 a. m. to 10 p. m.) for a period of 7 days, July 12-18, covers 7 United States highways and 38 State highways and shows an increase of 1.9 percent over 1947.

Annual traffic report not ready yet.

State of Nevada,
Department of Highways,
Carson City, Nev.
W. T. Holcomb,
State Highway Engineer,

NEW HAMPSHIRE

Information not available.

NEW JERSEY

Resorts	Total summer visitors 1948 (thousands)	Average length of vacation stay (days)	Retail sales
Atlantic City.....	9,000	7	\$611,000,000.00
Margate.....	15	28	542,000.00
Ocean City.....	1,500	14	50,000,000.00
Wildwood.....	1,500	10	26,112,647.00
Asbury Park.....	4,000	10	46,105,000.00
Long Branch.....	1,000	10	7,650,000.00
Point Pleasant (2 Boros).....	200	14	6,311,291.00
Beach Haven.....	210	21	1,302,511.00
Seaside Heights.....	750	4	8,611,529.00
Total.....	18,175	13.1	757,634,978.00
Increase over 1939.....	4,562	¹ 1.7	651,071,820.50

¹ Decrease.

Bureau of Publicity,
County of Ocean,
Toms River, N. J.
Jack Lamping,
Director.

NEW MEXICO

Information not available.

NEW YORK

Surveys made by the Travel Bureau of the New York State Department of Commerce indicate that New York's vacation business in 1948 was somewhat greater than in 1947. There was an increase of approximately 15 percent in the number of people vacationing in the State, but because of lower spending there was no increase in the dollar volume of business. For most of the season New York resorts were crowded. Compared with pre-war years, business was excellent.

Statistically the average New York vacation covered a period of 11 days during which the vacationer spent \$6.95 a day. The average vacationing group was a party of three which spent \$241.34.

A significant trend was the extension of the vacation season. September business showed an increase over the preceding year of 15 percent, and 27 percent more hotels stayed open for the fall season than in 1947.

Travel Bureau,
State of New York,
Department of Commerce,
Albany, N. Y.
Joseph J. Horan,
Director.



Attendance at conventions and exhibits in New York City totaled 2,184,574 persons in 1948. Climaxing a 3-year period of postwar growth and development, the bureau enjoyed its greatest convention year with the exception of 1939, the first year of the World's Fair.

Seventy of the six hundred forty-nine conventions here in 1948 were meeting in New York City for the first time in the history of their respective organizations.

The record number of 649 conventions here in 1948 is an increase over the 626 conventions for 1947 and the 458 in 1946. The attendance figures for conventions and expositions held in New York City for the past 3 years are :

Year	Number of conventions	Registered delegates	Total convention visitors
1946-----	458	209, 400	1, 003, 540
1947-----	626	334, 035	1, 952, 792
1948-----	649	421, 760	2, 184, 572

Obtaining conventions for New York is a direct selling job of personal contact and a highly trained staff is maintained for this purpose. Representatives of the bureau travel to conventions in session in other cities throughout the country to persuade them to meet in New York the following year. This campaign has been conspicuously successful in 1948. Decisions are made sometimes 1, 2 or even 3 years in advance.

New York Convention and Visitors
Bureau, Inc.,
500 Park Avenue,
New York 22, N. Y.
Royal W. Ryan,
Executive Vice President.

NORTH CAROLINA

Information not available.

NORTH DAKOTA

Information not available.

OHIO

From unofficial tabulations, the tourist industry meant some \$500,000,000 to Ohio during the past year. This compares with \$366,000,000 in 1939 which is an official Department of Commerce figure.

The Ohio Development and Publicity
Commission,
Room 402 State Office Building,
Columbus 15, Ohio.
John R. Advent,
Executive Secretary.

OKLAHOMA

Information not available.

OREGON

Fifteen highway stations adjacent to ports of entry were checked to obtain the fundamental in-

formation required in measuring the volume and economic value of Oregon's tourist industry.

From the information gleaned by interviewers, the following factors were developed:

Total number of foreign cars interviewed----	1, 775
Total number of people interviewed-----	5, 290
Average number of people per car-----	3. 07
Average length of stay per car-----	7.1 days
Computed number of tourist motor cars visit- ing Oregon, 1948-----	599, 330
Average number of miles driven in Oregon per car-----	663
Average expenditure per day per person----	\$5. 35
Average expenditure per day per car-----	\$16. 43
Average expenditure per stay per person----	\$37. 99
Average expenditure per stay per car-----	\$116. 65
Computed income from tourists traveling by car -----	\$69, 911, 844
Estimated income from tourists traveling by rail, bus, and air-----	\$22, 077, 424
Estimated income from total tourist traffic, 1948 (rounded)-----	\$92, 000, 000

Cash income from vacation travel derived from visitors who live beyond the borders of the State declined approximately 12 percent from the 105 million of 1947 to 92 million for 1948.

Another pertinent factor was the decline in individual spending, which reduced the average expenditure per stay per car from the \$127.65 of 1947 to \$116.65. This was attributed to the general high cost of living, and the necessity on the part of a substantial percentage of vacationers, to look carefully at the price tag on travel.

Oregon State Highway Commission.
Travel Information Department.
Salem, Oreg.
Manley F. Robison,
Director.

PENNSYLVANIA

We estimate the recreational travel and vacation business in Pennsylvania in 1948 approximated \$600,000,000.

Commonwealth of Pennsylvania,
Department of Commerce,
Harrisburg, Pa.
J. Herbert Walker, Director,
Vacation and Recreation Bureau.

PUERTO RICO

EXPENDITURES OF NON-RESIDENTS IN PUERTO RICO FISCAL YEAR 1947-48 ENDING JUNE 30

[Preliminary estimate]

Travelers from	Number of travelers	Average expenditures	Total expenditures (thousand \$)
Mainland.....	35,941	\$100.00	\$3,594
Virgin Islands.....	9,897	50.00	495
Foreign.....	11,439	130.00	1,487
Total.....	57,277	-----	5,576

Office of Tourism,
P. O. Box 3968,
San Juan, P. R.
J. Stanton Robbins, Director.

RHODE ISLAND

Information not available.

SOUTH CAROLINA

A special committee of the Chamber of Commerce of Walterboro surveyed the community's 1948 tourist trade and reported its findings to South Carolina's Research Planning and Development Board.

Annual Walterboro pay roll for 259 persons employed in business allied to travel amounted to \$374,400. Tourists spent \$1,126,018 during the same period in Walterboro.

Research Planning and Development
Board,
Box 927,
Columbia, S. C.
L. W. Bishop,
Director.

SOUTH DAKOTA

TOURIST SURVEY BY THE BUSINESS RESEARCH BUREAU OF THE UNIVERSITY OF SOUTH DAKOTA

We estimate that 1,200,000 out-of-State residents spent an average of 4 days and \$31.24 in South Dakota, or a total of \$37,488,000. That figure would include nonresident hunters but would not include South Dakota residents who

spent their vacations in our eastern lake region or in our mountain area in western South Dakota.

Tourist travel reached an all-time high in the Black Hills and Badlands during 1948. Average daily traffic for the State as a whole was up 10.5 percent over 1947, but in our western mountain area, the increase over the previous year was 15 percent.

Over 1,000 questionnaires were included in the preliminary tabulations and from these we have the following information:

Average number of persons in a group.....	4
Average number of days total vacation.....	14
Average number of days spent in South Dakota.....	4
Average number of days spent in Black Hills.....	2
Average amount spent per day per person:	
Food.....	\$2.56
Lodging.....	2.00
Car.....	1.90
Other.....	1.35
Total.....	7.81

Prices paid in South Dakota compared with other States:

	<i>Percent</i>
Lower.....	11.7
Same.....	75.9
Higher.....	12.4

Method of travel:

	<i>Percent</i>
Car.....	97.5
Train.....	1.5
Bus.....	.7
Plane.....	.3

TENNESSEE

Information not available.

TEXAS

The Texas Highway Department, Division of Traffic Services, Information Bureau analyzed the 1948 out-of-State tourist-flow by means of cards to be filled out by visitors and mailed after leaving the State. Results were reviewed and approved by the Bureau of Business Research, College of Business Administration, University of Texas.

During 1948, 1,849,000 out-of-State automobiles toured Texas carrying 5,012,000 tourists who spent \$114,528,000. They traveled an average of 678 miles during their visit, riding 2.71 people per car, spent \$6.33 per person per day, staying 3.61 days in the State. Of these tourists 51 percent

were visiting Texas for the first time. The purposes of their visits were: 72 percent on vacation, 15 percent for business, 12 percent to visit personalities.

Our out-of-State tourists traveled 1,253,973,000 miles in the State, consuming 83,598,000 gallons of petroleum which netted \$3,344,000 in additional State taxes. The number of tourists visiting Texas in 1948 was 33 percent greater than in 1947 but the average 1948 tourist spent 27.4 percent less money per day. Their itinerary of travel in the State increased 2.4 percent per vehicle but the average length of visit decreased 32 percent.

Division of Traffic Services,
Texas Highway Department,
Austin 26, Tex.

Fred T. Bennett,
Engineer.

✱

The annual report of the Texas State Parks Board, summing up the 1947-48 fiscal year (ending August 31, 1948) showed a final attendance tabulation of 2,588,503 visitors to State parks. Earnings from cabin and room rentals, boating, fishing, swimming, and other concessions amounted to \$68,346.61.

Texas State Parks Board,
106 East Thirteenth Street,
Austin, Tex.

UTAH

More out-of-State tourists visited Utah during this year than any other year in the State's history.

Tourists spent more than \$75,000,000 in Utah to date, marking a 25 percent increase over 1947, the State's largest previous year.

More than 2,750,000 travelers entered the State this year, as determined by accurate checks made by the department in cooperation with the planning division of the State Highway Commission. Travel officials estimate that more than 3,000,000 tourists will have passed through the State by the end of the year.

The sizable increase in the amount of money spent by tourists in Utah this year can be credited to the visitor spending a longer period of time in the State. This has been one of the major aims of the department since the beginning of the year.

While a national survey shows that tourists throughout the Nation spend 25 cents of each dol-

lar in retail stores, the tourists in Utah spent approximately 35 cents for these purposes.

Utah Department of Publicity and
Industrial Development,
8 West Second Street, South,
Salt Lake City, Utah.

David H. Mann,
Director of Publicity.

VERMONT

Information not available.

VIRGINIA

TRAVEL HABITS OF OUT-OF-STATE DRIVERS USING VIRGINIA HIGHWAYS

On the average day over 50,000 passenger cars bearing out-of-State license plates either enter or leave Virginia and slightly under 1 out of 5 vehicles using our rural primary highways are out-of-State licensed passenger cars. Realizing that we had no data regarding the habits of these drivers, it was decided to conduct two surveys, one in January and the other in July. These surveys, spaced 6 months apart, one in midwinter and one in midsummer, should tell the story of both winter and summer travel in Virginia by out-of-State drivers.

Station Locations

Eleven stations were selected for study and all were located on our major highways at strategic spots with respect to foreign passenger car travel. At each of these stations, only foreign licensed passenger car drivers were interviewed and all studies were conducted on weekdays between the hours of 8 a. m. and 4 p. m.

Questionnaire

The following questions were asked:

State of registration.

Number of passengers (including driver).

Number of days staying in Virginia.

Amount of money spent per person per day
in Virginia.

Business or pleasure trip.

Interviews Secured

In January, the party secured interviews from drivers of 1,545 cars, whereas, in July, 2,872 were obtained. According to our traffic counts taken all over the State, travel by foreign passenger cars

was 94 percent higher in July than in January of this year. Therefore, it may be assumed that our sample was substantially correct as we obtained 85 percent more interviews in July than in January which compares very favorably with the 94-percent increase in foreign passenger car travel.

ANALYSIS

State of Registration

The following shows the rating by States of the first 10 States for January and July with regards to percent of sample.

OF TOTAL FOREIGN DRIVERS INTERVIEWED, STATES WERE REPRESENTED AS FOLLOWS

Rank	January		July	
	State	Percent	State	Percent
1	New York	22.59	North Carolina	12.60
2	Pennsylvania	14.11	Pennsylvania	10.20
3	North Carolina	10.36	Maryland	9.88
4	New Jersey	9.45	New York	9.22
5	Maryland	7.57	Florida	9.19
6	Massachusetts	5.63	District of Columbia	7.20
7	District of Columbia	5.37	Ohio	5.60
8	Ohio	3.63	New Jersey	5.12
9	Connecticut	3.24	West Virginia	3.62
10	Florida	2.07	Tennessee	3.54

The tabulation definitely shows a decided difference in travel for the two surveys with regard to State. The travel in July is still predominantly north-south but not as pronounced as the January survey.

Passengers Carried

Our survey conducted in January showed the 1,545 cars to be carrying a total of 3,421 people or an average of 2.21 persons per vehicle.

On the July survey, 2,872 cars were carrying a total of 7,957 people or an average of 2.77 persons per car.

Days Spent

The following table shows the average length of stay in Virginia.

Month of survey	Business trips	Pleasure trips	Business and pleasure trips
January	2.08	1.44	2.12
July	3.22	2.42	2.16

Money Spent

AVERAGE AMOUNT SPENT PER DAY PER PERSON WHILE IN VIRGINIA

Month of survey	Business trips	Pleasure trips	Business and pleasure trips	All trips
January	\$7.32	\$6.26	\$4.54	\$6.54
July	5.82	5.01	5.15	5.15

Trip Purpose

Of the total cars interviewed in January, 36 percent were on business, 62 percent on pleasure, and 2 percent on a combined business and pleasure trip.

In July 23 percent were on business, 75 percent on pleasure, and 2 percent on a combined business and pleasure trip.

	Annually
Number of foreign passenger cars entering State between July 1, 1947, and June 30, 1948 ¹	7,320,000
Number of foreign passenger cars on pleasure trips (73 percent)	5,329,000
Number of foreign passenger cars on business trips (25 percent)	1,825,000
Number of foreign passenger cars on combined business and pleasure trips (2 percent)	146,000
Number of persons traveling on business (1.96 per car)	3,577,000
Number of persons traveling on pleasure (2.91 per car)	14,965,000
Number of persons traveling on combined business and pleasure (2.71 per car)	401,500
Amount of money spent by persons traveling for pleasure (\$5.50 per day for 2 days)	\$164,724,500
Amount of money spent by persons traveling for business purposes only (\$6.50 per day for 2¾ days)	63,948,000
Amount of money spent by persons traveling on combined business and pleasure trips (\$5.00 per day for 2 days)	3,942,000
Total amount of money spent by visitors to the State during the 1948 fiscal year	232,614,500

¹ For purpose of the report, the District of Columbia line was extended to include Arlington County, thereby eliminating many foreign vehicles on short trips.

Direction from which foreign passenger cars entered the State, 1948:

Direction :	Annually
North-----	3, 769, 800
South-----	2, 635, 000
West-----	915, 000
Total-----	7, 320, 000

Department of Highways,
Commonwealth of Virginia,
Richmond 19, Va.

J. P. Mills, Jr.,
Assoc. Traffic Engineer.

WASHINGTON

The year of 1948, according to the School of Economic and Business Research at the State College of Washington, Pullman, Wash., was a record-breaking year for the State of Washington, insofar as tourist expenditures are concerned. Tourist expenditures in the State during 1948 exceeded \$116,000,000. More than \$34,000,000 was spent in Washington by tourists from the North Central States. Tourists from Oregon and California spent more than \$42,000,000.

The average tourist party spent almost \$200 in the State of Washington, and nearly \$700 for the entire vacation. More than \$62 was spent for food, almost \$50 for lodging, nearly \$12 for clothing, and slightly more than \$18 for entertainment.

Approximately 490,000 out-of-State cars entered Washington, each car bearing an average vacation party of 3 persons (2.92 persons per party). Five-sixths of the tourists traveled in privately owned automobiles, while one-sixth traveled via train, airline, bus, etc. Nearly 30 percent of all tourists who vacationed in Washington came from the North Central States, and more than a third came from the Pacific Coast States. Combined, these two regions accounted for two-thirds of the tourist traffic.

The average vacationer who came to Washington in 1948 had at least a 1-month vacation, and spent more than 11 days in the State. There is a not unexpected correlation between length of total vacation and distance from Washington. Four-fifths of the east coast parties vacationing in Washington had vacations of a month or more duration. In the East North Central States this figure dropped to about three-fifths, and in the West North Central states was well below the half-way point.

Most tourists coming to Washington are in the middle income group (\$3,000-\$5,999). More than a third have annual incomes in excess of \$6,000,

and only 17.6 percent have incomes of less than \$3,000. The Washington tourist market appears to lie basically with middle and upper income groups. This suggests the presence of a class of vacationers who expect adequate standards of comfort, cleanliness, and courtesy.

The average vacation party coming to Washington consisted of three persons (2.92 persons per party). The most typical group is a party of two. The demand for accommodations is well diversified as between different types. Almost a fourth of all vacationers stay with friends and relatives. More than a third stay in auto courts. Hotels serve almost a fourth of the vacationers, and the rest divide between resorts, cottages, and trailer courts. The average vacationing party traveled more than 900 miles in the State. The Puget Sound area, Grand Coulee Dam, and Mount Rainier were the most popular scenic attractions. Fifty-eight percent of all tourists entered the State either at Portland-Vancouver or some point west of the Portland-Vancouver bridge. Twenty-four percent came into the State at the Spokane-Idaho entry area; 11 percent across the Oregon-Washington boundary east of Portland-Vancouver.

A complete report of the 1948 tourist industry in Washington has been released by the Bureau of Economic and Business Research in cooperation with the Department of Conservation and Development. The printed report, bulletin No. 8, contains typical travel patterns for tourists entering at each of the major entry points into Washington.

School of Economic and Business
Research,
State College of Washington,
Seattle, Wash.



Tourist travel during 1948 was slightly under that of 1947 for the city of Seattle. In spite of the decrease in tourist travel, however, the amount of money spent in Seattle brought about both by large conventions and by normal travel exceeded the \$25,000,000 mark. Seattle played host during the year ending October 31 to over 850,000 visitors.

Seattle Chamber of Commerce,
215 Columbia Street,
Seattle, Wash.

Karl Krogstad,
Manager,
Tourist and Convention Department.

WEST VIRGINIA

THIRD ANNUAL WEST VIRGINIA VACATION SURVEY, 1948

In 1946 this agency undertook what was believed to be the first comprehensive survey of tourist and vacation expenditures ever made in the State of West Virginia. In that year a formula was developed which, the sponsors felt, would give a reasonable view of the State's vacation income. Three principal factors were taken into consideration:

(a) Returns on interviews, and on standard questionnaires placed in the hands of bona fide tourist parties;

(b) Comprehensive visual traffic surveys made by the Planning Division of the State Road Commission; and

(c) Traffic counts made by the Road Commission's fixed rural traffic recorder stations.

In the first (1946) survey the figures developed in these three basic divisions of study produced an estimate that West Virginia's 1946 tourist and vacation income was \$44,276,000, which was felt to be a reasonable figure, inasmuch as a prewar estimate published by the New York Times assigned to the State a vacation income for 1939 of \$52,000,000.

Using the same formula, the Industrial and Publicity Commission came up with an estimate for 1947 of \$78,000,000.

For 1948 the same sources have provided bases for an estimate which the sponsors are reluctant to publish, so extraordinary does it appear. However, every indication points to the fact that West Virginia's highways carried more traffic and more vacation traffic during the 3 months of the study on which the estimate is based (June, July, and August) than in any period in history; gasoline-tax collections were at an all-time peak; and a cross-section of tourist parties, reached through personal interviews or through questionnaires, reported spending more per person and per party than in any of the two previous years of record.

When the standard formula, that used in 1946 and 1947, is applied to the base figures for 1948, the estimate of West Virginia's 1948 vacation income is the extraordinary figure of \$146,500,000. Even taking into consideration the factor, developed in the study, that 1948's vacationist in West Virginia spent nearly 25 percent more, on the average, than the 1947 visitor, the estimate indicates

that vacationists came to West Virginia in 1948 in unprecedented numbers.

The survey does not take into account expenditures by West Virginians vacationing within their own State, undoubtedly a substantial figure in itself.

Evidence that the commission's study is not a superficial one is found in the results of the visual study conducted for the report by the State Road Commission. The 1948 tabulation involved 37,412 passenger automobiles.

The 3 months of June, July, and August are used in the study since a composite of national studies shows that 74 percent of all vacation travel is in that period of time. The survey does not take into account vacation travel other than by automobile since the great bulk of West Virginia's vacationists are assumed to travel in private automobiles.

How Many?

Incidence of foreign license travel on West Virginia highways in 1948, as in the two previous years, was determined through the visual survey made by the Road Commission and through the totals tabulated by the Road Commission's fixed rural traffic counters. The visual survey developed these figures from studies made at eight selected points:

	June	July	August	3-month totals
Passenger cars.....	11, 679	12, 083	13, 650	37, 412
West Virginia licenses.....	8, 124	8, 254	8, 720	25, 098
Foreign licenses.....	3, 555	3, 879	4, 930	12, 364
Percent West Virginia.....	69. 6	68. 3	63. 9	67. 1
Percent foreign.....	30. 4	31. 7	36. 1	32. 9

The automatic fixed rural traffic recorders showed record high figures for 1948 during the 3 months arbitrarily used in the study. State-wide totals (all vehicles) are shown in the table below, with comparisons with 1941 (prewar) and 1947:

Year	June	July	August
1941.....	830, 130	891, 126	936, 572
1947.....	886, 830	968, 006	1, 029, 200
1948.....	1, 016, 890	1, 135, 313	1, 160, 516

On the assumption that 74 percent of all vacation travel is in the 3 months of June, July, and

August, then it may be estimated that 1,471,039 foreign licensed automobiles will travel West Virginia highways during 1948. The fact that some of these may be traveling on business is undoubtedly more than counterbalanced by the omission from the estimate of domestic vacation expenditures, although there is no way, in this study, to verify the statement.

How Much?

Actual interviews with tourist and vacation parties and standard questionnaires were used by the Industrial and Publicity Commission in obtaining estimates on vacation spending within West Virginia in 1948. This phase of the study followed a pattern established in 1946 and continued in 1947. Results of the 1948 spending survey are shown below.

	1948
Average number in party.....	3.2
Average number of days spent in West Virginia...	4.95
Average number of miles driven in West Virginia...	343
Average amount spent per person per day.....	\$6.35
Average amount spent per party per day.....	\$20.40
Average amount spent per party per stay in West Virginia	\$99.60
Percentage of parties with children.....	32

The 1948 total of vacation expenditures, or \$146,500,000, is obtained, of course, by combining the studies of numbers and spending.

It is in order to repeat the comment in the 1947 report to the effect that all this expenditure is not confined to hotels, restaurants, and gasoline stations, by any means. Merchants of all types benefit. Visitors go to theaters, attend church. If it is assumed arbitrarily that visitors buy in West Virginia only half the gasoline needed for their travels within the State they still would leave approximately \$1,500,000 in gasoline taxes in the State's coffers, the sum earmarked for highway improvements.

Conclusions

Once again the study developed West Virginia's shortcomings in the field of vacation accommodations. However, during the 1948 survey there was a marked increase in the number of favorable comments in regard to private accommodations, especially in the South Branch Valley.

Again West Virginia's State parks came in for highest praise. Undoubtedly the State's parks are top-flight vacation objectives. Expansion of cabin facilities in the parks is greatly to be desired, in

the opinion of the sponsors of this survey.

Curiously, the Industrial and Publicity Commission received only one complaint of high prices during the 1948 season, and, remarkably, the complaint duplicated the single one voiced in 1946. In both instances the vacationist objected to the price of 100 pounds of ice delivered to a camp in the mountains. Only one complaint of high prices was heard in 1947, too, this concerning hotel rates increased overnight during a local celebration. The commission regards this almost complete absence of objection to prices as evidence that the vacationist, as a class, is out for a good time and is prepared to pay for it.

West Virginia's 1948 visitors again made it plain that they want good food and good sleeping accommodations. Importance of developing such services is emphasized by the fact that again a large number of tourists interviewed said they came to West Virginia on recommendation of friends, or because they had been here before, liked what they found and so returned.

The Industrial and Publicity Commission is exceedingly grateful to those who cooperated with it during the season in making the study on which this report is based. Especially appreciated is the fine cooperation of the State Road Commission.

West Virginia Industrial and
Publicity Commission,
State Capitol,
Charleston 5, W. Va.
William C. Hanlan,
Executive Director.

WISCONSIN

The following figures were based on increases over the 1947 season. American-plan resorts: 50 percent reported a decrease averaging 12 percent; 20 percent reported "even" and 30 percent reported an increase averaging 8 percent. Housekeeping resorts: 10 percent reported decreases averaging 5 percent; 35 percent reported "even" and 55 percent reported increases averaging 15 percent. Resorts having a combination of American-plan and housekeeping accommodations reported: No decrease; 14 percent "even"; and 86 percent reported increases averaging 17 percent.

An interesting note on the survey indicates the regions from which the vacationers come. Placing first with 56 percent is Illinois; Wisconsin is second with 15 percent; Minnesota, 10 percent;

Iowa, 7 percent; Indiana, 6 percent; Ohio, 2 percent; others, 4 percent.

In Wisconsin's Indian Head country, conservatively speaking, 75 million dollars was spent by vacationists in 1948. In the State of Wisconsin an excess of 300 million dollars was spent by touring guests.

Wisconsin Indian Head Country, Inc.
Hotel Eau Claire,
Eau Claire, Wis.

WYOMING

The amount of money left by 1,300,000 tour visitors is estimated at around \$75,000,000. These figures are arrived at through surveys and questionnaires sent to tourists who registered at various points during their stay in the State and who stated in their answers the number of days they spent in the State, total number in their party,

how much per day per person they spent and so forth. The number of visitors, 1,300,000, is based on reports from Yellowstone National Park and the highway checking stations of the Wyoming Highway Commission. These figures are considered reasonably conservative. It must be borne in mind that the figure of 75 million dollars represents expenditures for gas, oil, lodging, meals, and tires, souvenirs, etc.

The dude ranch industry also had a very successful year and many of the operators reported capacity bookings through the whole season and as late as October 15. No figures were available as to the total value of the dude ranch income.

Wyoming Commerce and Industry Commission,
213 Capitol Building,
Cheyenne, Wyo.,
H. C. Anderson,
Secretary-Manager.

PART II

The Problem of Measuring Travel Movement

GENERAL STATEMENT ON THE SIGNIFICANCE OF THE RECREATIONAL TRAVEL MOVEMENT IN THE UNITED STATES

AS A BACKGROUND for a discussion of the need for the accurate measurement of the amount and the significance of recreational travel it seems appropriate to describe, briefly, the domestic travel situation in the United States.

The people of the United States are great travelers. We have, throughout our entire history, been of a restless, inquisitive disposition that gives us the urge to travel. This was true during the early days of our Nation when the widespread territory from the Atlantic to the Pacific was explored, developed and settled in an incredibly brief period of time, and it is true today. Our 145 million people now operate more than 30 million private automobiles, 6½ million trucks, buses, and commercial vehicles, and have a vast system of paved highways over which to operate these vehicles. Great networks of rail, air, and water carriers also serve our travel needs.

The resort facilities have kept pace with the development of transportation facilities. There are over 55,000 hotels, resorts, motor courts, tourist homes, hunting and fishing camps, and camps maintained by organized groups. These contain over 2 million rooms and can accommodate between 3 and 4 million persons at any one time. In addition, extensive camping facilities are maintained in Federal, State, and private reservations of various types throughout the Nation.

For many years, it has been recognized that the servicing of recreational travel within the United States, its Territories and possessions comprises one of the greatest industries in the Nation. The exact status of the industry is not accurately known since precise methods of measuring the amount

and value of such travel have not yet been devised, but it is a generally accepted fact that travel as an industry is exceeded in size and value only by agriculture and manufacturing. The estimates on the value of recreational travel in the United States in 1947 vary. The conservative estimate used by the U. S. Travel Division is 11 billion dollars.

Although the economic value of our domestic travel is great, the Nation is not unaware of its even greater importance in adding to the educational and recreational welfare of our people. The significant increase in recent years of the number of community and regional fairs, fiestas, rodeos, flower shows, sporting events, regattas, races, etc., is merely one manifestation of the power of recreational travel in enlivening and enriching the lives of the people.

There is, of course, an intricate system of travel promotion in effect in the United States to keep the travel tide moving.

On the side of industry, the public carriers, the hotels and resorts, the travel agents, the oil industry, the automobile clubs, chambers of commerce, and many other interests combine to provide advertising and travel services in amazing variety.

On the side of government, the development of State travel information departments has reached a high level. Nearly all of the 48 States, the District of Columbia, and the Territories now have such departments engaged in active advertising campaigns and in furnishing extremely attractive and effective travel publications and informational services. There is in addition a large group of regional travel promotion units supported partly by public and partly by private funds. The States,

counties, and municipalities, in addition to their travel information services, provide fine systems of parks, forests, and recreational areas to add to the travel attractions of the Nation.

The Federal Government has encouraged the travel movement in many ways. It has assisted materially in the development of the highway system and the rail, air, bus, and steamship lines.

It has provided a wide variety of travel attractions in the form of national parks, national forests, game refuges, and great reservoirs in the river valleys. It assists the individual business enterprises comprising the travel industry in many ways. It gathers statistics concerning certain phases of travel but not to a comprehensive and satisfactory degree, as previously stated.

NEED FOR ACCURATE STATISTICS CONCERNING RECREATIONAL TRAVEL

Probably the best method of stating the need for accurate statistics concerning travel, on a Nation-wide basis, is to state some of the specific uses to which these statistics would be put. A few of the uses are as follows:

Federal, State, and Territorial agencies concerned with the operation of recreational areas and facilities, or with assisting firms and organizations in the travel business are vitally interested in these statistics and could operate their programs more efficiently if this information were available.

State and regional travel promotion organizations, chambers of commerce, and other public and semipublic organizations could plan the extent and hence the cost of the travel promotion campaigns necessary to keep a profitable travel tide moving.

Hotels, resorts, restaurants, transportation companies, automobile clubs, and oil companies would have a dependable guide for planning not only their travel promotion campaigns but the improvement of their services and facilities.

Publishers of books and magazines would bene-

fit greatly not only in planning travel publications but many features of their general-interest publications. This would apply both to subject-matter and advertising.

Research and fact-finding organizations would find this information very useful. It would aid in evaluating the economy of the Nation and many phases of the social life of the Nation.

Manufacturers of transportation equipment, sporting goods, clothing, photographic equipment, souvenirs, and many other products could use this information to advantage.

Investors interested in ventures connected with the travel field need more accurate information concerning the volume, value, and trends of travel. The Federal Reserve banks are already attempting to compile as much information of this kind as possible.

The travel industry as a whole would stand to benefit greatly in establishing its position as one of the largest industries in the Nation if accurate figures to confirm the present estimates of its position were available.

REVIEW OF EFFORTS THAT HAVE BEEN MADE TO GATHER TRAVEL STATISTICS ON A NATION-WIDE BASIS

At first glance, the task of gathering Nation-wide travel statistics might seem to be a large but not a formidable one. Many persons have approached this task with a great deal of confidence in their ability to work out a solution without too great difficulty. They invariably find, however, that beginning with the definition of the objectives of the survey and proceeding on through the methods of obtaining the information and finally of evaluating it, many obstacles arise that to this date have proven to be insurmountable. There follows a brief discussion of some of the difficulties that have been encountered in each of the three major steps of the survey; first, *objectives*; second, *methods of obtaining the information*; third, *the evaluation of the basic information*.

Objectives

Before information can be assembled concerning recreational travel, or vacations, such travel must be defined. There have been innumerable definitions of vacation travel ranging all the way from that of a person who is more than 50 miles from home with recreation as his objective, to that of a person who is away from home for more than 3 days with recreation as his objective. The adoption of the latter standard greatly simplifies a fact-finding campaign.

After a vacation has been defined, it must then be agreed as to what information is needed about vacationists, or recreational travelers, depending on what you prefer to call them. Leaders in the travel industry believe that the following basic information is needed each year:

The total number of persons who take vacations.

Where do they go?

What do they like to do?

What types of food and lodging do they prefer?

How long do they stay?

What means of transportation do they use?

How much money do they spend?

Time of year they prefer to travel.

A great many other facts are sought by special interest in the travel field, but in most cases it would seem that such information could be obtained by sampling rather than by methods involving a complete Nation-wide count. Answers to several of the basic questions outlined above can also be obtained partly by deduction from the questions that are answered by actual Nation-wide count and partly by sampling.

The questions that seem to require an actual Nation-wide count are:

The total number of persons who take vacations.

Where do they go?

How long do they stay?

What means of transportation do they use?

What time of year do they prefer to travel?

The questions that probably could be answered by deduction from the above facts, by sampling, and from the results of surveys that have already been made are:

What do they like to do?

What types of food and lodging do they prefer?

How much money do they spend?

With reference to the entire list of basic questions, it is essential that the figures be compiled for the Nation as a whole and that these figures then be broken down by States and Territories.

Methods of Obtaining Information

Few, if any, surveys have been started with a comprehensive list of objectives such as that outlined in the previous section. Many have been started containing parts of these objectives or for obtaining detailed and specialized information for

specific commercial purposes. None have produced any satisfactory Nation-wide statistics that can be utilized by the travel industry.

Many attempts have been made to conduct Nation-wide travel surveys by piecing together information obtainable from various Federal and State agencies. One plan was to secure information on the total number of travelers, where they went and how they traveled, by adding up statistics obtained from the Bureau of Public Roads, with reference to highway travel, and from the Interstate Commerce Commission with reference to travel via the public carrier. Insurmountable difficulties are immediately encountered here. The BPR records cover total traffic on specific United States highways. There are no suitable factors for separating tourist travel from all other travel, and no suitable factors for segregating travel by States or by travel objectives. The same difficulties apply to the statistics available from the Interstate Commerce Commission.

Careful studies have been made of the statistics concerning the national income maintained by the Department of Commerce, but no suitable method of segregating the figures pertaining to the portion of the national income that may be attributed to recreational travel has been devised.

The statistics maintained by the Bureau of Labor Statistics of the Department of Labor do contribute a valuable bit of information, but one which does not solve the entire problem. These figures show the number of persons gainfully employed and the number of such persons who receive vacations with pay. This is very valuable information, but it is not conclusive as applied to the general problem.

The statistics maintained by the National Park Service, Department of the Interior, on travel to all areas in the National Park system are among the most inclusive and accurate figures pertaining to travel on a Nation-wide basis that are available. They are extremely valuable for showing the exact status of travel to the national park and hence are valuable for indicating the general travel trends. However, the National Park Service has few, if any, areas in certain States. For this and other obvious reasons these figures cannot be used

as a basis for Nation-wide, all-inclusive travel statistics.

Nearly all of the States and Territories now maintain official travel promotion offices. These offices estimate the volume and value of travel in their State each year. A few of the States conduct this operation quite carefully. In Oregon, for example, the Travel Information Department of the Oregon State Highway Commission has road blocks on key highways for a number of days each year. They obtain information from each automobile as to the average number of persons per car, average daily expenditure per person, length of stay and similar matters. This sampling, plus the general records of the Highway Commission as to highway usage, permits them to issue travel statistics that have considerable value. In California, very accurate figures as to highway travel are available through the records of the agricultural inspection stations maintained at all highway entrances.

At the present time, the statistics issued by the various States, although valuable, will not stand comparison because of the wide variation in the methods used in compiling these figures. This situation may provide the key, however, for the eventual solution of the Nation-wide travel statistics problem.

The above outline has touched only briefly on the history of the collection of Nation-wide travel statistics. Many other governmental and private organizations have done work that should be mentioned if time and space would permit. It is believed that the facts cited amply demonstrate the need for securing, at least once in each decade, an accurate body of figures concerning the annual volume and value of recreational travel.

Evaluation of the Basic Information

There are several valuable studies as to the distribution of the travel dollar, the average number of passengers per automobile, the average daily expenditures of travelers according to their various levels of preference and financial means, and on a number of other subjects that would aid in evaluating the basic facts once they have been obtained.

PLAN FOR COLLECTING TRAVEL STATISTICS IN CONNECTION WITH THE 1950 POPULATION CENSUS

Since several years may elapse before a workable plan is devised for measuring the annual volume of travel through methods involving the cooperation of Federal, State, and private organizations and in view of the immediate need for an accurate set of travel statistics for the reasons enumerated and as a standard of comparison by which to check the accuracy of these new methods when they are tried, it is urged that the gathering of Nation-wide travel statistics be made a part of the 1950 population census.

The questionnaire proposed for the census is as follows:

QUESTIONNAIRE

1. Did you and/or members of your family take a vacation trip or trips of over 3 days' duration during the past 12 months?

Yes No

(IF YES)	<i>Trip No. 1</i>	<i>Trip No. 2</i>	<i>Trip No. 3</i>	<i>Trip No. 4</i>
(a) Month taken ¹	-----	-----	-----	-----
(b) Number of persons in vacation party.....	-----	-----	-----	-----
(c) Principal vacation destination (or destinations) ²	-----	-----	-----	-----
(d) Number of days away from home.....	-----	-----	-----	-----
(e) Number of days at principal destination (or destinations).....	-----	-----	-----	-----
(f) Method of transportation used ³	-----	-----	-----	-----

¹ If trip was more than a month in duration, record month of departure.

² Designate State (or States), Territory, or foreign country, not locality within a State, or foreign country. If a sight-seeing tour with no specific destination, name State farthest from home as destination.

³ Designate one of following:

- Private automobile.....
- Bus.....
- Train.....
- Airplane.....
- Ship.....
- Other.....
- Combination of above.....

This is a concise set of questions. The footnotes explain the difficulties that may arise in connection with questions (a), (c), and (f). It is believed that the census workers can easily master these questions. In most cases they should be able to receive the information needed within 1 to 3 minutes.

The tabulations of the returns could be made in accordance with the following form:

TABULATION OF THE RETURNS

1. Number of persons who took a vacation trip

2. Distribution of these trips by month of the year.

January.....	July.....
February.....	August.....
March.....	September.....
April.....	October.....
May.....	November.....
June.....	December.....

3. Vacation destination (number of persons naming the following places as principal vacation destination).

Alabama.....	Minnesota.....
Arizona.....	Mississippi.....
Arkansas.....	Missouri.....
California.....	Montana.....
Colorado.....	Nebraska.....
Connecticut.....	Nevada.....
Delaware.....	New Hampshire.....
District of Columbia.....	New Jersey.....
Florida.....	New Mexico.....
Georgia.....	New York.....
Idaho.....	North Carolina.....
Illinois.....	North Dakota.....
Indiana.....	Ohio.....
Iowa.....	Oklahoma.....
Kansas.....	Oregon.....
Kentucky.....	Pennsylvania.....
Louisiana.....	Rhode Island.....
Maine.....	South Carolina.....
Maryland.....	South Dakota.....
Massachusetts.....	Tennessee.....
Michigan.....	Texas.....

Utah-----	West Virginia-----
Vermont-----	Wisconsin-----
Virginia-----	Wyoming-----
Washington-----	
Alaska-----	
Hawaii-----	
Puerto Rico-----	
Virgin Islands-----	
Canada-----	Europe-----
	Mexico-----
	Other foreign countries-----

4. Average number of days away from home -----
5. Average number of days at destination -----
6. Methods of transportation used (number of persons using).

Private automobile-----
Bus-----
Airplane-----
Ship-----

Other -----
 Combination of above-----

This would provide the solid core of information needed with reference to recreational travel. It would leave unanswered certain questions set forth in the third section, as follows:

What do they like to do?

What types of food and lodging do they prefer?

How much money do they spend?

Since these questions would make the census questionnaire bulky and the answers would add greatly to the time required per interview they were not included. It is believed that these facts can be secured in other ways and effectively combined with the census travel figures by competent authorities.

