

RESEARCH BULLETIN 799

MARCH, 1962

UNIVERSITY OF MISSOURI COLLEGE OF AGRICULTURE
AGRICULTURAL EXPERIMENT STATION

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Contributions of Tourist Trade to Incomes of People in Missouri Ozarks

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(Publication authorized March 7, 1962)

COLUMBIA, MISSOURI

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CONTENTS

Summary and Conclusions	3
Introduction	5
Need for Study	5
Purposes of Study	6
Method of Study	6
Attributes of a Tourist and Recreational Area	9
The Ozarks as a Recreational Area	11
Location	11
Transportation Facilities	11
Climate	11
Water	11
Man-Developed Facilities	12
Wildlife	12
Vegetation	12
Historical Sites	12
Natural Areas	12
Importance of the Tourist Trade to the Ozark Area	13
The Effect of the Tourist Business on Incomes	17
Characteristics of Operators	17
Age and Sex	17
Tenure of Operators	18
Place of Birth and Farm Experience	20
Places of Employment	20
Educational Background	20
Business Ladder	24
Characteristics of Businesses	27
Method of Operation and Hours of Labor	27
Gross Sales	27
Number of Employees	27
Conditions of Employment and Characteristics of Workers	29
Number of Employed and Wages Paid	29
Number Employed to Cater to Tourists	31
Wages Paid to Employees Who Cater to Tourists ...	34
Conditions of Employment	34
Residence of Employees	34
Length of Employment	34
Characteristics of Employees	37
Sex	37
Age of Employees	38
Work Assignments	38
Employees' Kinship to Operators	40
Amount Paid to Full Time Workers	40
Employees' Prior Residence-Rural or Nonrural	43
Source of Goods Merchandised	43
Business Changes To Meet The Needs Of Tourists	47
Number and Types of Retailers	48
Motels	50
Size of Unit	50
Type of Facilities	53
Percentage Occupancy	54
Rates Per Night	58
Volume of Business	58
Restaurants	59
Appendix	62

ACKNOWLEDGEMENT

The authors gratefully acknowledge the contribution of many individuals to this report--especially the valuable advice and constructive criticism of Buis T. Inman of the Farm Economics Division, Economic Research Service, Department of Agriculture.

CONTRIBUTION OF THE TOURIST TRADE
TO THE INCOMES OF PEOPLE IN
THE OZARKS OF MISSOURI

Ronald Bird and Frank Miller*

SUMMARY AND CONCLUSIONS

The purpose of this study was to evaluate the opportunities for enlarging the economic base in the Missouri Ozarks by the use of resources for recreation. Specific objectives were to determine (1) the importance of the tourist trade in contributing to the incomes of people residing in the area; (2) the proportion of the tourist dollar that goes to rural people; (3) the characteristics of firms that cater to the tourist trade, whether or not they provide employment for rural people, and opportunities for careers in this type of work; (4) the changes in types of businesses that have occurred to meet the needs of tourists.

The investigation included 31 counties in the Ozark area and encompassed all counties in Missouri that were classified by the Department of Agriculture in 1955 as lying in the area of substantial or serious low farm incomes except Greene and St. Francois Counties.

Data were obtained by interviewing about 10 percent of all operators of retail and personal service establishments in the area. These data were supplemented by data from reports of the State Department of Health and Welfare for all motels in the area for the last 10 years, and other secondary sources.

The total volume of business of retail and service firms in this area was \$319,500,000 in 1959. The operators indicated that \$68,000,000, or more than 21 percent of this amount was obtained from tourists.

Operators of retail and personal service firms profited most from the tourist trade. Eighty-seven percent of these businesses were operated by the owners. Seventy-five percent of the operators were born in Missouri and 63 percent were born in the Ozark area. More than 72 percent of the operators were reared on farms or had operated a farm. More of the younger operators had farm backgrounds than did the older proprietors. The rapid expansion of the tourist trade in recent years, has increased the opportunities for local farm youth to become proprietors.

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Seventy-nine percent of the operators said they had not been employed outside of Missouri, and 52 percent had not been employed outside the county in which they were residing.

Most of the retail businesses were relatively small. More than 15 percent of the operators reported gross sales of less than \$10,000, and another 15 percent reported gross sales of \$10,000 to \$19,999. Of significance was the fact that as the age of the operator increased, gross sales decreased. Apparently, the younger operators, who had had more formal training than the older operators, were able to obtain management jobs with the larger concerns, or if their own businesses did not meet their expectations, they were more able to shift into a better paying job.

Operators of retail and personal service firms in the area employed 17,519 workers in 1959. About 97 percent of these people resided in the county in which they were working and had lived there prior to their present employment. About 82 percent of them were hired fulltime. However, about 17 percent of these persons were related to the employer and did not receive a direct wage payment. As a result of the tourist trade, 5,321 more employees were hired than otherwise would have been employed.

The total payroll of retail and service firms in the area was \$27,435,000. It was estimated that about 22 percent of this amount (\$6,119,000) resulted from the tourist trade.

Usually, unskilled workers are paid a lower wage than skilled workers. Similarly, women are paid at a lower rate than men. This situation also exists in the Ozark area. For workers who were employed fulltime, the average unskilled male worker was paid \$2,618 and the average unskilled female worker, \$1,715. Semiskilled workers were paid about \$500 more per year than those without skills. Managerial workers were paid about \$500 more per year than semiskilled workers.

About 41 percent of the employees who were hired in 1959 had lived in a rural area prior to their present employment. The relative numbers of rural and town workers who were hired for semiskilled and managerial positions showed no significant difference.

The tourist trade resulted in the employment of an estimated 2,182 part or fulltime workers who resided in the rural areas. They received \$2,509,000 as wages in 1959.

In 1959, approximately \$2,485,000 worth of locally produced goods was sold through retail stores to tourists. About 60 percent of this amount was income from food items.

The tourist trade has brought about many changes in the number and type of firms located in the Ozark area. Even though the population has decreased about 25,000 since 1950, the number of retail and personal service firms has increased about 32 percent.

Approximately 38 percent of the retail and personal service firms in the area have been established since 1950. The major increase has been in those that cater to the needs of tourists. For example, the number of motels in the area in 1960 was 143 percent greater than in 1950.

The recreational resources of the Ozark area have provided local people with many opportunities for new jobs. In 1959, the operators of retail and personal service firms estimated that about 21 percent of their business came from tourists. The amount of income they attribute to tourists has increased rapidly in recent years. Many new businesses are established each year to meet the needs of a steadily increasing number of visitors. Most of these businesses are relatively small. More than 75 percent of them have been organized by people who live in the area. Farm people have found this field of new industry open to them. Almost 75 percent of the operators of businesses were born on a farm.

Additional jobs in firms catering to tourists have also been created. Almost 97 percent of these jobs have been filled by local people. Forty-one percent of them were from homes outside the boundaries of incorporated towns.

INTRODUCTION

Need for Study

The Ozark Plateau of Missouri has long been recognized as an area of low incomes. The economic resources of rural people in the Ozarks are more limited than those in other areas of the state. Previous studies have shown that this limitation restricts the incomes of both farm and nonfarm families. Many of the farms are too small to provide full employment and desirable levels of income for the families who operate them. Much of the land is unsuited to cultivated crops or pasture. There are indications that it may be suited to such uses as recreation and forestry, which can be made complementary to each other.

The characteristics of rural people in the area, their levels of income, the resources they command, and the possibilities of raising incomes through changes in farm organization were presented in previous studies.¹ These studies have confirmed the fact that the incomes of both farm and nonfarm rural families are low and that conditions can be improved for a limited number through reorganization of farm businesses. However, additional opportunities to earn income are needed to raise the general level of welfare in the area. A solution to some of these problems may be found by making a

¹Ronald Bird, Frank Miller and Samuel C. Turner, Resources and Levels of Income of Farm and Rural Nonfarm Households in Eastern Ozarks of Missouri, Missouri Agricultural Experiment Station Research Bulletin 661, 1958, and Ronald Bird and Frank Miller, Profitable Adjustments on Farms in Eastern Ozarks of Missouri, Missouri Agricultural Experiment Station Research Bulletin 745, 1960.

Careful analysis of the underdeveloped or partially used resources.

The tourist industry has been identified as having a sizable potential for increasing the incomes of people in the region. However, little factual data exists regarding the contributions of this type of activity to the economy, who receives the benefits, and what the potential income would be if this industry were fully developed.

Because there are so many different concepts of a "tourist", it was considered advisable to define the term as used in this study. The term "tourist" is generally associated with the term "vacation" and is related to the use of a resource while a person is traveling for pleasure. However, many persons who travel do so for a variety of other reasons. Yet the impact of their visits on the local economy may be the same. Hence a more comprehensive definition of a tourist than a pleasure traveler or vacationist was adopted. A tourist was defined as any person who travels away from home and does not reside in the locality visited. The resource he came to enjoy or use was defined as a tourist resource. For this resource to be considered an economic good, the traveler would need to spend money for its use or make some effort to gain possession of it. Therefore, the premise was advanced that for this resource to have economic value to an individual residing in the area visited by the traveler, the local resident would need to profit financially from the presence of the visitor.

Purpose of Study

The purpose of this study was to evaluate opportunities for enlarging the economic base in the Missouri Ozarks by intensifying the use of resources for recreation. To accomplish this purpose, specific objectives were instigated to determine (1) the importance of the tourist trade in contributing to the incomes of people residing in the area; (2) the proportion of the tourist dollar that goes to rural people; (3) the characteristics of firms that cater to the tourist trade, whether or not they provide employment for rural people, and opportunities for careers in this type of work; (4) the changes in types of businesses that have occurred to meet the needs of tourists.

Methods of Study

The investigation includes all counties in State Economic Areas 5, 7, and 8, except Greene and St. Francois (Figure 1). Greene County was excluded because of the influence of Springfield, which is both a manufacturing and a trade center. Many tourists stop there, but other activities are more important than the tourist trade. St. Francois County was excluded because of the dominant influence of mining on the economy.

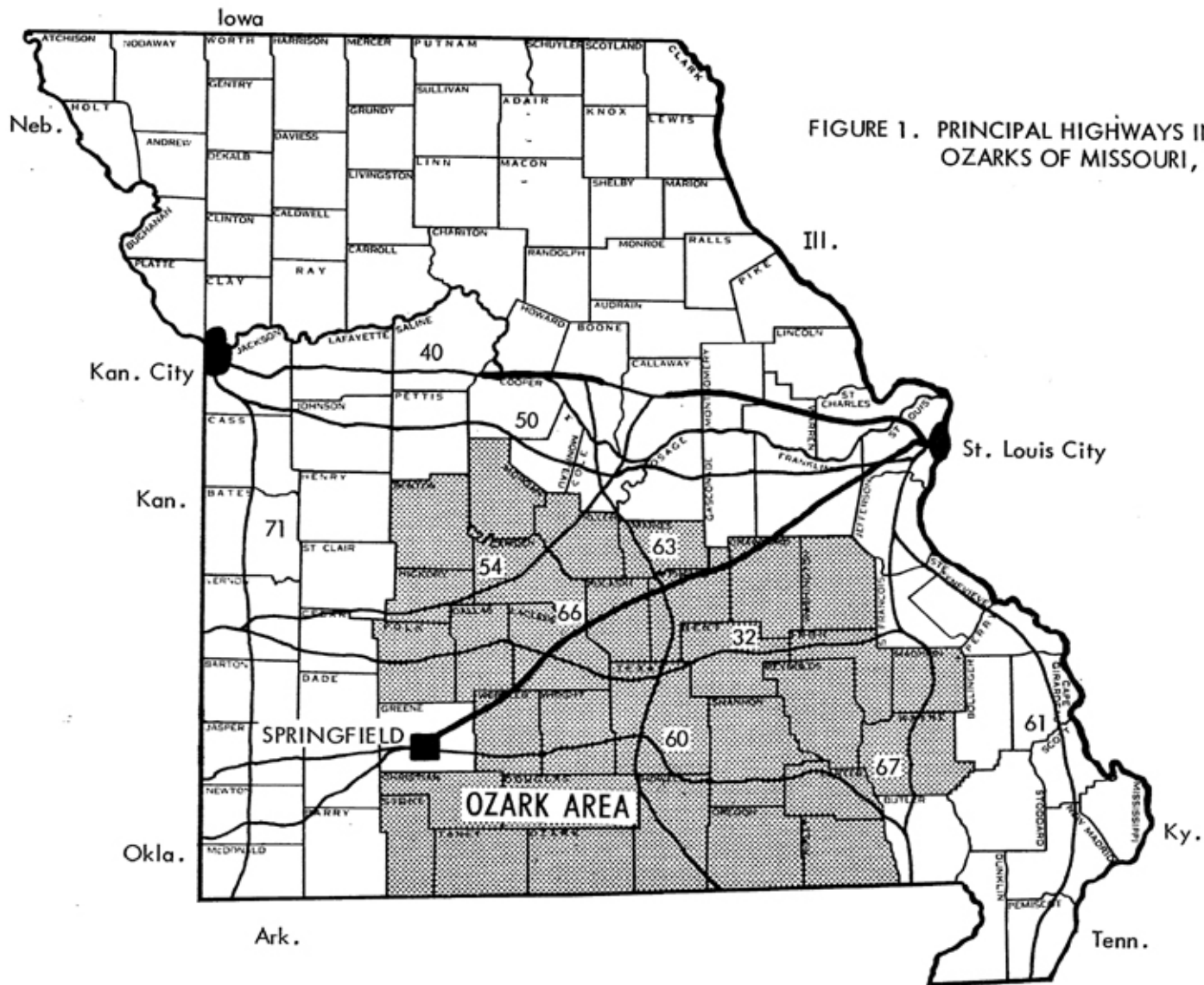


FIGURE 1. PRINCIPAL HIGHWAYS IN THE OZARKS OF MISSOURI, 1961

Secondary data that provided information on total employment and kinds of business were assembled and analyzed. These data were also used to determine the number of each kind of retail establishment to be included in the sample. The secondary data came from these sources:

- (a) Census of the Retail and Manufacturing Trade in the area for 1939, 1948, 1954, and 1958.
- (b) Sales tax collections of 62 different kinds of retail establishments by quarters in the year 1959 from reports to the State Department of Revenue.
- (c) Inspection reports on motels obtained by the Department of Public Health and Welfare of the State of Missouri.

A random sample of retail establishments was selected and the proprietors or managers were interviewed to obtain information on the proportion of retail sales that was attributed to tourism and the share that went to rural people through employment and outlets for locally produced products. Information was also obtained on the type and location of the business, the characteristics of operators and employees, and the value of the different kinds of products and services merchandised.

To insure that each firm had an equal chance of inclusion, two steps were taken in selecting the sample.

First, the counties were stratified according to similar economic characteristics. To reduce interview costs, one county was selected from each stratum. To insure that the operator of each store had equal chance of being interviewed, the counties were grouped by stratum and each county was assigned a group of numbers on the basis of the number of retail establishments in that county. A number was then selected from a table of random numbers representing the number of firms in the stratum. The county in which this number was located was selected as the sample county.

Second, to select the particular firm to be interviewed, the stores were grouped into 62 different types and by location in each of the stratum. The number of stores of the types to be interviewed was indicated and the county agent supplied the list and location of the firms. From a list of all firms of this type in the county, a random sample of stores was selected for interview.

Interviews were conducted in 12 of the 31 counties. In April 1960, there were 8,466 firms that reported a sales tax to the State Department of Revenue. Plans included interviewing a 10-percent sample, or 847 operators. The interviews revealed that 32 operators were not the owners who had made the 1959 report. Eighteen other owners had two businesses -- for instance, a tavern and a restaurant. As data were desired on the business transacted in 1959, only 797 interviews were completed.

ATTRIBUTES OF A TOURIST AND RECREATIONAL AREA

A wide range in resources is necessary to make an area successful as a tourist area. Each member of a family visiting an area has different recreational desires. One member likes to dance; another wants to swim or water ski; another prefers golf; a fourth wants to fish, and a fifth may want to roam through the unspoiled forest. A study conducted by the Resource and Development Commission shows that general sight-seeing is the most common purpose of tourists who come to Missouri (Table 1). Visiting historic spots is the second most common purpose, and taking photographs is third. It appears that the recreational resources that brought these tourists to Missouri can be grouped into the following categories: accessibility, climate, water, man-developed areas, wildlife and vegetation, rough topography, and historical sites.

Recreational areas are developed for people. Accessibility is a large factor in determining the success or failure of a venture. Nearness of large population centers and easy and rapid transportation facilities from these centers to the recreational area insure its use. Distances are measured in time rather than in miles.

Climate is important in the use of a particular recreational area. For water sports, the temperature must be mild and even warm. Whereas those who enjoy hiking prefer a cooler climate than those who take to the water. Other recreational pursuits require still different climatic conditions.

Water is one of the most important items needed in a good recreational area. It is essential to the health and comfort of the people and contributes to several types of sports. Among them is swimming, boating, water skiing, and fishing. The swimming area should be equipped with good beaches and clean water of varying depths to accommodate both swimmers and waders. A large and moderately smooth water surface, such as a lake, is needed for water skiers. The water for these two activities needs to be fairly warm.

Man-developed facilities may exist in areas with or without ideal settings. These facilities are designed and constructed by man primarily to satisfy the social, physical, cultural, and recreational requirements of large numbers of people.

An abundant and varying wildlife culture is an essential part of most recreational areas. Plants and animals in their natural setting give enjoyment to people in different ways. Many persons like to hunt; others prefer to observe and photograph the animals in their natural habitat.

Vegetation and rough topography add to the attractiveness of a recreational area. The rough terrain and living plants have great scenic value for viewers. Vegetation provides cool, pleasant surroundings for those who enjoy relaxation in scenic spots. Vegetation also attracts, and provides refuge for, the animal life that people enjoy watching.

TABLE 1--PERCENTAGE DISTRIBUTION OF RECREATIONAL ACTIVITY ENJOYED BY TOURISTS VISITING MISSOURI FROM SPECIFIED STATES, 1959*

Activity	First Tier**	Second Tier [¢]	Third Tier ^{¢¢}	Average
	Percent	Percent	Percent	Percent
General Sightseeing	30.2	35.1	29.9	31.7
Picnicking	3.3	3.0	2.0	2.9
Taking Photographs	7.7	12.7	13.4	10.4
Fishing	14.3	6.7	5.2	9.9
Camping	5.6	3.7	2.1	4.3
Boating	6.6	.6	3.1	4.2
Swimming and Bathing	5.2	3.0	3.0	4.1
Visiting Historic Spots and Sights	15.6	17.3	17.5	16.5
Nature Study	1.4	.7	4.2	1.8
Dancing and Night Life	1.9	1.4	1.2	1.6
Operettas and Shows	.6	1.6	0.0	.7
Golf and Tennis	0.0	0.0	1.0	.2
Shopping	2.4	5.9	4.0	3.8
Seeking Places to Retire	0.0	1.6	2.1	.9
Resting and Relaxation	<u>5.2</u>	<u>6.7</u>	<u>11.3</u>	<u>7.0</u>
Total	100.0	100.0	100.0	100.0

*From Tourist Survey for 1959, p. 18, Missouri Resource and Development Commission, Jefferson City, Missouri.

**Missouri, Kansas, Nebraska, Iowa, Illinois, Kentucky, Tennessee, Arkansas, Oklahoma.

[¢]Wisconsin, Indiana, Ohio, Colorado, Texas.

^{¢¢}The remaining contiguous states in the nation.

Historical sites are an attraction for many tourists. Battlefields, forts, old buildings, and other landmarks attract people for sentimental and other emotional reasons.

THE OZARKS AS A RECREATIONAL AREA

Location

The area selected for this study is known as the "Ozarks of Missouri" (Figure 1). It includes 31 counties which extend 150 miles along the border of Arkansas and thence northward 150 miles. One tier of counties separates the northern counties from the Missouri River and two tiers separate the eastern counties from the Mississippi River. On the west, two tiers of counties separate the area from Kansas.

Three metropolitan areas have easy access to the Ozark area. St. Louis is only 40 miles from the northeastern counties, and Kansas City is 50 miles from the northwestern counties. Springfield is on the west-central fringe of the area.

Transportation Facilities

The major arteries of transportation run north and south. U. S. 66, a four-lane highway from St. Louis to Springfield, dissects the area and permits a rapid flow of travelers through the Ozarks to the west and east coasts. On the eastern fringe, U. S. 67 and U. S. 61 permit rapid travel for those going south to Memphis and New Orleans. From Kansas City, U. S. 71 and U. S. 66 offer excellent access to the area. Going from west to east, U. S. 60 and U. S. 32 provide easy and rapid travel into the area. Highways 54, 63, and 65 permit easy access from directly north or south of the area.

Climate

The Ozarks have a humid continental climate, characterized by warm summers, cool winters, and maximum rainfall in early summer and winter. Rainfall and temperature are subject to wide daily, monthly, seasonal, and annual variations. Summer precipitation is usually light, causing July and August to be warm and dry. The average length of the growing season varies from 169 days in the northwestern section to 205 days in the southeastern part.

Water

A wide variety of water resources are found within the Ozarks. There are seven lakes with more than 5,000 miles of shoreline. Mammoth springs feed rivers that flow through narrow valleys. These large rivers have been used extensively by float fishermen. Because of their extremely cold water, some of the springs have been used as sites for trout fishing parks. Notable among them are Montauk in Dent county and Bennett Springs in Laclede county. Other warmer springs feed rivers where bass flourish.

Man-Developed Facilities

To accommodate the needs of tourists traveling in the area, facilities have been erected to cater to the desires of most travelers. The area has 11 state parks, each developed in harmony with the natural resource of the particular site. More than 900 motels and resorts have been erected; they will accommodate more than 7,500 families for an overnight visit. Other facilities, such as those needed for hiking, horseback riding, golf, tennis, dancing, boating, swimming, and fishing are found throughout the Ozark area. Special events, such as rodeos, boat racing, and dances are held at appropriate times during the year.

Wildlife

The Ozark area provides a setting in which most of the types of wildlife found in the United States can flourish. The abundant water resources vary enough to satisfy most species of aquatic game and fish. Almost 65 percent of the total land area is in forests, which provide a suitable habitat for most forest game in every county. The wild animals prevalent around small farm woodlots find abundant cover in undisturbed areas on most farms.

Vegetation

Oak, hickory, dogwood, willow, red cedar, walnut, pine, elm, and many other trees and shrubs provide a beautiful setting for spring and fall travel. Intertwined in the forest cover is the green of the native and tame grasses that are grown for hay and pasture on the small acreages of arable land.

Historical Sites

Several historic battlegrounds of the Civil War are located in the Ozarks. One of the major travel routes to the Southwest in the settlement period traversed this area. Evidence of the early Spanish and French explorers are displayed in some locales. Those who seek to enrich their knowledge of the development of the West have found an abundant source of data in this region.

Natural Areas

In the southeastern part of the Ozarks is an area that has not been greatly modified by man. Clear streams fed by huge springs flow unmolested through narrow river valleys and rugged terrain. Woody hillsides dropping rapidly 300 to 400 feet to stream levels provide a restful setting for people who wish to float leisurely through the area. Recently, the riparian land along three of these streams has been recommended as a national park by the Secretary of Interior.

The variety and abundance of the various types of resources needed to make an area successful as a recreational area are found in the Ozark area of Missouri.

IMPORTANCE OF THE TOURIST TRADE TO THE OZARK AREA

Many procedures have been used in estimating the expenditures of tourists in a given area. Usually the pattern followed has been to estimate the number of visitors and multiply this figure by an estimated expenditure per person or per family. Both of these estimates are subject to considerable error. The first relates to obtaining reliable data on the number of persons visiting a given area and the second to the expenditures per person or per family. In the latter situation, failure to identify where these expenditures occur as well as for what they were made has led to some rather fantastic claims.

A reliable estimate of the contributions of the tourist trade to a given area can be made through an analysis of the volume of business done by retail and service establishments in that area. Most expenditures of travelers are made at these establishments. In some instances, receipts from tourists can be identified. For example, most of the receipts of motel or hotel businesses are obtained from persons who do not live in the immediate locality. Other operators of businesses obtain a small percentage of their gross business from nonresidents but, even for them, a fairly accurate estimate can be derived. In the rural areas, most operators are acquainted with their local customers and can estimate the share of the business that can be attributed to them.

The number of retail businesses in a given area is not great. Interviews with a representative number of their operators is neither difficult nor too time consuming. After these percentages have been obtained, a simple multiplication of the volume of business done by certain types of firms in the area by the applicable percentages should result in a reliable estimate of the amount the tourist trade has contributed to each type of business. Addition of the volume of business attributable to tourists for each type of firm should indicate the amount that the recreational resource has contributed to all firms in the area. This procedure was followed in deriving estimates of the amounts tourists spent in the Ozark area.

The Department of Revenue of the State of Missouri provided data on sales taxes collected from the operators of 62 different types of businesses for the year 1959. A summary of the volume indicated by these data for various business groups is shown in Table 2. The total was \$221,256,000. Excluded from this figure are the gasoline and automobile sales that occurred in the area, returns to firms whose businesses were reported from a central office located outside the area, and the reports of operators whose businesses are of a service nature.

TABLE 2--VOLUME OF BUSINESS OF RETAIL AND SELECTED SERVICE FIRMS, MISSOURI OZARKS, 1959

Type of Firm	Volume of Business		
	Sales Tax Reports 1959 <u>a/</u>	Census 1958 <u>b/</u>	Estimate for 1959
	1,000 <u>Dollars</u>	1,000 <u>Dollars</u>	1,000 <u>Dollars</u>
Groceries	46,125	57,323	58,000
General Merchandise	27,518	30,088	31,000
Apparel and Accessories	8,182	10,798	11,000
Drugs	8,495	6,968	7,000
Taverns, Liquor Stores and Bars	5,349	—	5,500
Restaurants	12,812	18,161: <u>c/</u>	14,000
Furniture, Home Furnishings	11,681	8,079	10,000
Lumber, Building Materials and Hardware	35,396	31,005	32,000
Automotive Dealers and Garages	14,904 <u>d/</u>	59,278	60,000
Gasoline Service Stations	14,010 <u>e/</u>	28,045	30,000
Farm Supplies and Agricultural Products	9,590	—	10,000
Amusement	4,563	:	5,000
Other Retail	10,029	34,013: <u>c/</u>	20,000
Motels and Hotels	12,602	—	14,000
Selected Service Firms	<u>f/</u>	23,468: <u>c/</u>	12,000
TOTAL	221,256	307,226	319,500

a/ Data from the Missouri Department of Revenue.

b/ Data from the Census of Business, 1958, Vol. II, Retail Trade, BC 58-RA 25, pp. 9-17 and the Census of Business, 1958, Vol. VI, Selected Services, BC 58-SA 25, pp. 8-12.

c/ Data were not shown separately.

d/ The sales tax was paid by purchase.

e/ Sales tax is not paid on gasoline because of special tax levies.

f/ Sales tax is not paid on services.

TABLE 3--VOLUME OF BUSINESS CONTRIBUTED TO THE OZARKS
BY TOURIST TRADE, 1959

Type of Firm	From all Sources	Attributed to Tourist Trade	
		Proportion*	Amount
	1,000 Dollars	Percent	1,000 Dollars
Groceries	58,000	13.8	8,000
General Merchandise	31,000	18.7	5,800
Apparel and Accessories	11,000	13.6	1,500
Drug Stores	7,000	11.4	800
Taverns, Liquor Stores and Bars	5,500	34.5	1,900
Restaurants	14,000	49.3	6,900
Furniture, Home Furnishings	10,000	13.0	1,300
Lumber, Building Materials, and Hardware	32,000	13.1	4,200
Automotive Dealers and Garages	60,000	15.8	9,500
Gasoline Service Stations	30,000	31.7	9,500
Farm Supplies and Agricultural Products	10,000	8.0	800
Amusements	5,000	34.0	1,700
Other Retail	20,000	12.0	2,400
Motels and Hotels	14,000	94.3	13,200
Other Service Firms	12,000	4.2	500
TOTAL	319,500	21.3	68,000

*Data obtained by interviewing the operators of 797 retail businesses. Each reply was weighted by the volume of business that the respondent did for the year. If each respondent's reply had been given equal weight, the result would have been \$71,500,000.

The Census of Retail and Service Trade was used to supplement the sales tax data. For example, census data were available for the year 1958 on the volume of business done by all retail and service establishments in each county. These data were used to determine the volume of business done by firms that were excluded from the sales tax. Census showed a total retail business of \$307,226,000 in 1958. After making adjustments for differences in the volume of business done in 1958 and 1959, it was estimated that the operators of all retail and service firms in the Ozark area did \$319,500,000 worth of business in 1959. Based on the questionnaire data, the proportion of this total business was allocated to the tourist trade.

The operators of business firms in the Ozarks stated that about 21.3 percent of their total retail business was obtained from persons who did not live in their trading area (Table 3). The amount of business obtained from them amounted to \$68,000,000 in 1959.

The amount of their total trade that operators considered to be obtained from nonresidents varied from 0 to 100 percent. However, the operators of service firms showed the lowest percentage from the tourist trade (4.2 percent), and the operators of motels and hotels the highest (94.3 percent). About 7 percent of the respondents stated that they received 100 percent of their business from local residents, whereas 12 percent said they received none of their business from local people. In the former situation, the operators of farm supply and agricultural product firms were in the majority, and in the latter the operators of hotel and motel firms were dominant. Ninety-three percent of the operators said that some percentage of their business was obtained from nonresidents. This fact indicates the broad influence of the tourist trade on trade in the Ozark area.

Previous studies of tourist expenditures and comparisons with the estimates made by retailers in the 1959 survey are shown in Table 4. The tourist surveys indicated that tourists spent about 70 percent of their trip outlay for food, lodging and transportation, whereas the retailers' opinion in the Ozark area indicated that tourists spent about 72 percent on these items. However, the breakdown on the other three items differed materially. The tourist survey showed that about 11 cents of each dollar was spent for entertainment purposes, whereas the retailers indicated that this item amounted to about 3 cents of each dollar. For the other two items, the tourist surveys showed an expenditure of 5 cents for services and 14 cents for other retail purchases, compared with the retail survey, which showed an expenditure of 1 cent for services and 24 cents for other retail purchases.

TABLE 4--DISTRIBUTION OF TOURIST'S DOLLAR SPENT FOR SELECTED ITEMS, AS INDICATED BY TOURIST SURVEYS AND RETAILERS' OPINIONS, OZARKS, 1959

Item	Tourist Surveys*	Retailers' Opinions**
Percentage of Tourist's Dollar Spent for --	<u>Percent</u>	<u>Percent</u>
Food	27	25
Lodging	21	19
Transportation	22	28
Other Retail Purchases	14	24
Entertainment	11	3
Services	<u>5</u>	<u>1</u>
TOTAL	100	100

*The 1958 Tourist Survey in Missouri, Missouri Division of Resources and Development, p. 12.

**Data from 797 operators of retail firms in the Ozark Area. Detailed data are shown in Table 3.

These variations may be attributed to differences in recreational facilities. In the Ozark area, many of the attractions are gifts of nature and are enjoyed at small cost. In other areas, the attractions are man-made and require payment of a fee. Also, with less elaborate facilities, the desires of tourists for services are reduced--the "roughing it" attitude prevails.

A generalized estimate of the relative importance of the tourist trade to a given area could have been obtained from any one of the first three items listed in Table 4. For example, if only data on the expenditures for lodging were available (14 million) and it was known (as indicated) from previous surveys that this item represented about 20 percent of the tourist's expenditure, it could be assumed that the total outlay would be about \$70,000,000. In this instance, this estimate would have been about the same as the estimate developed after interviewing the various retailers--\$68,000,000.

Expenditures of tourists in the Ozark area were more than half as large as the total sale of all farm products (\$68,000,000 from tourists compared with \$121,756,000 for farm products in 1959). This estimate places the tourist trade second to agriculture in its relative importance to the area.

EFFECT OF TOURIST BUSINESS ON INCOMES

Probably as important as measuring the amount of tourist expenditures is that of determining the impact on the local population. If only a few operators receive increased returns from the tourist trade, it has less impact on the local economy than if many people share in it. Also, if the recreational resource is to be used to help raise the level of living of local people -- the additional jobs created through expansion of the tourist trade must be available to them as proprietors or employees or through sale of their products in retail stores. An analysis of what has happened in this regard in the past may give some indication of what will happen in the future.

Therefore, an analysis of data from the survey of the characteristics of employers and employees, and of the sources of products they marketed in 1959 was made to indicate the impact of expansion of tourist trade on the people in the area and on opportunities for employment. Additional information was obtained on the kind and dollar volume of locally-produced products that were sold.

Characteristics of Operators

Age and Sex

The operators of retail and service businesses usually have had more training and are more mature than a person first seeking a job. In the Ozark area, more than 93 percent of the operators of retail and service firms were over 30 years of age (Table 5). More than 95 percent were less than 65 years of age. The most common ages were those between 45 and 64 years.

TABLE 5 -- PERCENTAGES OF OPERATORS OF RETAIL AND SERVICE FIRMS, BY AGE AND SEX, 1959

Item	Sex of Operator		Total
	Male	Female	
Number of Operators	720	74	794*
	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>
Age of Operator -			
Under 30	7.4	....	6.7
30-44	37.4	54.1	38.9
45-64	50.8	41.9	50.0
65 and over	4.4	4.0	4.4
Total	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>

*There were 3 of the 797 operators who did not provide information on their ages.

Approximately 9 percent of the operators were female. The most common types of businesses managed by women were restaurants and apparel shops. None of the female operators were under 30 years of age; the most common ages were between 30 and 44 years.

Tenure of Operators

Approximately 87 percent of the retail and service businesses were operated by their owners (Table 6). Another 2 percent, usually service stations, were operated by lessees whose tenure was similar to that of an owner-operator.

More of the operators who were over 30 years of age were owners than were those who were under 30. However, there was no significant relation between owner-operation and the various ages above 30 years. Apparently, ownership of a business is gained at a rather early age and does not alter significantly as the operators grow older.

At the time of the interview, about 45 percent of the operators had established the businesses they were running. Fewer of the operators who were under 30 years of age than of those over 30 had established their own businesses. For those over 30 years of age, there was no significant relation between the various ages of operators and whether they had founded the business.

TABLE 6--DISTRIBUTION OF OPERATORS OF RETAIL AND SERVICE BUSINESSES, BY AGE,
AND TENURE, OZARKS OF MISSOURI, 1959

Item	Age of Operator				Total
	Under 30	30 - 44	45 - 64	65 and over	
Number of Operators	53	309	397	35	794
	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>
Tenure of Operator*					
Owner-Operator	67.9	87.1	89.2	88.6	86.9
Manager	28.3	10.7	9.3	11.4	11.2
Lessee	<u>3.8</u>	<u>2.2</u>	<u>1.5</u>		<u>1.9</u>
TOTAL	100.0	100.0	100.0	100.0	100.0
Operator Established Business**					
Yes	24.5	40.4	49.6	48.6	44.7
No	<u>75.5</u>	<u>59.6</u>	<u>50.4</u>	<u>51.4</u>	<u>55.3</u>
TOTAL	100.0	100.0	100.0	100.0	100.0

*Statistical test: Age of operator under 30 years of age and 30 years and older by owner-operator; computed chi-square 17.64, critical chi-square at .05 probability 3.84. For difference between age intervals over 30 years and owner-operator; computed chi-square 1.36, critical chi-square at .05 probability 3.84.

**Statistical test: Age of operator under 30 years and 30 years and older by operator established business; computed chi-square 17.64, critical chi-square at .05 probability 3.84. For difference between age intervals and 30 years and over and operator established business; computed chi-square 5.03, critical chi-square at .05 probability 5.99.

Place of Birth and Farm Experience

Of primary importance in gaining the support of local residents for developing tourist resources is factual information about opportunities the development will provide for increasing incomes. About 63 percent of the operators of retail and service establishments had been born in the area (Table 7). Another 12 percent were born in other areas of Missouri. Only 25 percent were born outside the state.

As more of the people are employed in agriculture than in any other occupation and as the demand for farm workers has been decreasing, many of those now in the area need to seek new vocations. About 72 percent of the operators of retail and service businesses in the area said they were reared on farms or had farmed at one time. Slightly more of the younger than of the older operators had farm backgrounds. It seems therefore, that many local farmers who wanted to enter the retail business were able to do so. Furthermore, since the tourist trade has been expanding rapidly and a higher percentage of the younger operators have farm backgrounds, these tourists apparently have increased the opportunities for farm youth to become proprietors and managers of retail and service businesses.

Places of Employment

To obtain some idea of the characteristics of the individuals who become operators of retail and service establishments in the Ozark area, operators were asked about their job experiences during the last 20 years. Seventy-nine percent said they had not been employed outside Missouri and 52 percent that they had not been employed outside their present county (Table 8). Those operators who had been employed outside the county indicated that most of their previous jobs were in Missouri but not in the Ozark area. Many of them had worked in Kansas City and St. Louis.

Educational Background

The level of education or training may be important in the management of some businesses. College training is often required. However, in this area, only 22 percent of the operators had attended college, and about 8 percent had graduated (Table 9). A college degree was most often mentioned by drug store proprietors or managers.

Trade school training is often substituted for college training as it may be of greater value in the operation of some types of business. Sixteen percent of the operators had attended trade schools. Those who were 30 to 44 years of age were more likely to have had trade school training than those in other age groups. This may have been a result of the Veterans Training Program. The trade school most often mentioned was that for mechanics.

TABLE 7 -- DISTRIBUTION OF OPERATORS OF RETAIL BUSINESSES BY AGE, PLACE OF BIRTH, AND FARM EXPERIENCE, OZARKS, 1959

Item	Age of Operator				Total
	Under 30	30-44	45-64	65 and Over	
Number of Operators	53	309	397	35	794
	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>
Place of Birth:					
Same or Adjacent County	64.2	58.3	50.4	42.9	54.0
Other County in Ozarks	9.4	8.7	8.6	8.6	8.7
Other County in Missouri	13.2	11.0	12.3	11.4	11.8
Outside Missouri	13.2	22.0	28.7	37.1	25.5
Total	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>
Operator Reared on a Farm:					
Percentage Answering -					
Yes	69.8	68.0	70.3	60.0	68.9
No	30.2	32.0	29.7	40.0	31.1
Total	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>
Operator was Reared on a Farm or Farmed:*					
Percentage Answering -					
Yes	73.6	71.8	72.0	60.0	71.5
No	26.4	28.2	28.0	40.0	28.5
Total	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>

*Statistical test: Age of operator and whether operator was reared on a farm or was a farmer; computed chi-square 2.86, critical chi-square at .05 probability 7.82.

TABLE 8 -- PLACE OF EMPLOYMENT OF OPERATORS OF RETAIL AND SERVICE BUSINESS BY AGE OF OPERATOR

	Age of Operator				Total
	Under 30	30-44	45-64	65 and Over	
Number of Operators	53	309	397	35	794
	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>
Operator Left County for Employment Sometime During the Last 20 Years -					
Yes	43.3	51.5	47.6	37.1	48.4
No	56.7	48.5	52.4	62.9	51.6
Total	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>
Operator Had Employment in Other Ozark Counties in Missouri During the Last 20 Years -					
Yes	9.4	12.9	13.6	2.9	12.6
No	90.6	87.1	86.4	97.1	87.4
Total	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>
Operator Had Employment in Other Than Ozark Counties in Missouri During the Last 20 Years -					
Yes	24.5	23.3	22.9	8.6	22.5
No	75.5	76.7	77.1	91.4	77.5
Total	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>
Operator Left State for Employment During the Last 20 Years Other Than Military -					
Yes	13.2	23.0	18.9	28.6	21.0
No	86.8	77.0	81.1	71.4	79.0
Total	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>

TABLE 9 -- DISTRIBUTION OF OPERATORS OF RETAIL AND SERVICE BUSINESS, BY AGE AND EDUCATION, OZARKS OF MISSOURI, 1959

Item	Age of Operator				Total
	Under 30	30-44	45-64	65 and Over	
Number of Operators	53	309	397	35	794
	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>
Percentage of Operators Answering -					
Attended High School					
Yes	96.2	82.2	67.8	57.1	74.8
Years Attended					
1	3.8	4.2	3.0	8.6	3.8
2	1.9	7.1	12.1	11.4	9.4
3	1.9	4.5	3.3	....	3.5
4	88.6	66.4	49.4	37.1	58.1
No*	3.8	17.8	32.2	42.9	25.2
Total	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>
Attended Trade School:					
Yes	15.1	21.7**	12.3	14.3	16.2
No	84.9	78.3	87.7	85.7	83.8
Total	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>
Attended College:					
Yes	43.4	21.0	20.7	8.6	21.8
No	56.6	79.0	79.3	91.4	78.2
Total	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>
Graduated From College:					
Yes	22.6	7.1	7.6	2.9	8.2
No	77.4	92.9	92.4	97.1	91.8
Total	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>

* Statistical test: Between age of operator and whether attended high school computed chi-square 37.27, critical chi-square at .05 probability 7.82.

** Statistical test: Operators who were 30 to 44 years of age and who were other than this age by operators who attended trade school; computed chi-square 11.27, critical chi-square at .05 probability 3.84.

About 25 percent of the operators had not attended high school. High school attendance was indirectly related to age. Forty-three percent of the people who were 65 years of age or older had had no high school training compared with only 4 percent of the operators under 30 years of age.

In general, operators of retail establishments had had more years of schooling than others living in the rural areas of the Ozarks. For example, only 34 percent of the rural people living in the eastern Ozark area in 1956 had attended high school, whereas the study indicated that about 75 percent of the operators of retail and service businesses in 1960 had attended high school.² Apparently the workers who have left rural pursuits to become operators of retail businesses have had considerably more formal schooling than those who have remained in old jobs.

Business Ladder

Individuals have followed various procedures in establishing themselves as operators of business firms. Among them have been higher levels of education, special courses such as those offered in trade schools, job experience, and on-the-job training. To determine whether on-the-job training programs had been substituted for formal educational training, the operators were grouped into four age brackets (under 30 years, 30 to 44 years, 45 to 64 years and 65 years and over). About 7 percent of the operators who were interviewed were under 30 years of age. Thirty-six percent indicated that they had held no other job before becoming an operator of a business firm (Table 10). Sixty-three percent of these operators had college training and another 16 percent had had trade school training. All of the operators with management experience only had attended high school.

About 24 percent of the operators who were under 30 years of age had received apprenticeship training in jobs related to their present occupations.³ All of them had finished high school and 39 percent had attended a trade school or college.

Another 40 percent of the operators who were under 30 years of age had had experience in jobs unrelated to their present occupations. Nearly 10 percent had had no high school training.

For the under 30 years age group, a significant difference was noted between the percentage of operators who had had some college training and had become operators with no other experience (63.1 percent) and the percentage of operators who had had no college training and had become operators with no

²Ronald Bird, Frank Miller, and Samuel G. Turner, Resources and Levels of Income of Farm and Rural Nonfarm Households in Eastern Ozarks of Missouri, Missouri Agricultural Experiment Station Research Bulletin 661, 1958.

³Apprenticeship was defined as experience gained as an employee of a similar or the same retail or service establishment.

TABLE 10--AGE DISTRIBUTION OF OPERATORS OF RETAIL AND SERVICE BUSINESSES BY TYPE OF EXPERIENCE AND EDUCATIONAL TRAINING

Age and Education	Previous Experience of Operator*		
	Operator only	Apprenticed Present Job**	Unrelated to Present Job
Number of Operators	19	13	21
	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>
Age of Operator:			
Less than 30 years old			
College	63.1	30.8	33.3
Trade School†	15.8	7.7	19.1
High School	21.1	61.5	38.1
No High School	...	...	9.5
Total	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>
Number of Operators	89	77	143
	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>
30 to 44 years old			
College	28.0	11.7	21.7
Trade School†	13.5	23.4	20.3
High School	46.1	54.5	44.8
No High School	12.4	10.4	13.2
Total	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>
Number of Operators	199	52	146
	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>
45 to 64 years old			
College	25.8	23.1	13.0
Trade School†	9.1	13.5	13.0
High School	40.4	26.9	38.4
No High School	24.7	36.5	35.6
Total	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>
Number of Operators	17	2	16
	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>
65 years old or older			
College	17.6	...	...
Trade School†	5.9	50.0	18.7
High School	47.1	...	31.3
No High School	29.4	50.0	50.0
Total	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>

*In most instances, the data included was the employment experience of the operator for the last 20 years.

**"Apprenticed" was defined as experience gained as an employee of a similar or the same retail or service establishment.

†Most of the operators had attended high school.

other experience (36.9 percent). Apparently formal education was substituted for time spent in gaining experience in various other lines of work. Also, more of those who had been apprenticed in jobs similar to their present occupations had finished high school than those who had gained experience in fields unrelated to their present positions.

About 39 percent of the operators were 30 to 44 years of age. Twenty-nine percent had become operators with no other experience; another 25 percent had had apprenticeship training. Forty-six percent of the operators had held jobs that were unrelated to their present occupations. The percentage of operators who had attended college and had had no apprenticeship training (28.0 percent) was significantly larger than the proportion who had attended college and also had had apprenticeship training (11.7 percent). Fewer of the operators with management experience only than of those with a wider range of experience had attended trade school. There was no significant relation between the number of operators who had only grade or high school training and their previous background of experience.

For the 30 to 44 year age group, very few operators who had been apprenticed in their current jobs had attended college. Yet operators who had worked at unrelated jobs had had as much college training as those who had held only operator jobs.

The information on job experience covered only the last 20 years; the background of operators who were over 44 years of age may be incomplete. Because of the changing nature of the retail business, it is believed that this omission does not destroy the significance of the findings. For this reason, the data are presented.

Fifty percent of the operators of retail and service businesses were 45 to 64 years of age. Twenty-one percent of these people had attended college. Fewer of those who had held jobs unrelated to their current occupations had had some college training than of those who had had experience in different jobs. However, there was no significant difference between those who had held management jobs only and those who had been apprenticed with regard to amount of college training. Nor was there any significant relation between the number having high school training and their experience background.

About 4 percent of the operators of retail businesses in the Ozark area in 1960 were 65 years of age and older. More than 40 percent of these operators had had only a high school education.

For the younger operators, high school and college training has been a requirement for management jobs. However, some individuals have substituted apprenticeship training for formal education. The fact that many operators had gained ownership with little formal education and were lacking in apprenticeship training shows that these aids to ascent of the business ladder are not essential to owner-operatorship. However, they seem to be helpful.

The data enumerated previously indicated that 87 percent of the operators of retail and service businesses were owners; 75 percent were born in Missouri; 72 percent were reared on

farms; more than 50 percent had not been employed outside the county in which they were born; about 45 percent had established the businesses they were currently operating, and more of the younger operators than of the older people claimed the Ozark area as their place of birth. Since the tourist trade has increased rapidly in recent years, it is concluded that its impact on this area has been to offer many local residents an opportunity to become owners of retail and service establishments. For the most part, operators who had been farmers have become owners or managers of these businesses.

Characteristics of Businesses

Methods of Operation and Hours of Labor

To the patrons, especially farmers, the occupation of retailer may seem to be a glamorous and relatively easy way of making a living. In the Ozark area, this concept is not correct. The operators of these businesses probably work more hours per year, per week, and per day than any other workers in the area. Ninety-four percent of the respondents stated that they were open for business every month during the year, and about 43 percent were open 7 days a week. Less than 2 percent were open 5 days or less, and 55 percent were open for business 6 days of the week. Seventeen percent of the operators said they catered to trade 24 hours a day, and less than 2 percent were open for business less than 10 hours a day. Since most of these establishments were operated by the owner or his wife, time for other activities was limited.

Gross Sales

For these long hours of labor, the operators of retail stores and service businesses in the Ozark area have received modest returns. Although no data on net incomes were obtained, an indication of their levels can be obtained from gross sales. Many items of merchandise are sold with a markup of less than 25 percent of the original cost. From this amount, the operator pays wages to hired labor and interest on capital, as well as returns to himself and his family.

About 15 percent of the operators reported gross sales of less than \$10,000 (Table 11). An equal number reported gross incomes between \$10,000 and \$19,999. Less than 14 percent reported gross incomes ranging from \$20,000 to \$29,999. More than 44 percent of the operators reported sales of less than \$30,000, whereas less than 13 percent had sales of more than \$100,000. Of significance was the fact that as the age of the operator increased, the gross sales decreased.

Number of Employees

Most of the retail and service establishments in the Ozark area are small in terms of number of employees. About 15 percent of the businesses employed only the operator. Another 33 percent had only one additional worker. In many instances, this worker was the operator's wife or a member of

TABLE 11 -- GROSS SALES OF RETAIL AND SERVICE BUSINESSES BY AGE OF OPERATOR

Gross Sales	Age of Operator*				Total
	Under 30	30-44	45-64	65 and Over	
Number of Operators	53	309	397	35	794
	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>
Gross Sales Were -					
Less than \$10,000	7.5	11.7	16.9	37.1	15.1
\$ 10,000 to \$ 19,999	1.9	18.4	14.9	17.1	15.5
\$ 20,000 to \$ 29,999	24.5	13.6	12.8	2.9	13.5
\$ 30,000 to \$ 39,999	17.0	7.8	7.8	11.4	8.5
\$ 40,000 to \$ 49,999	3.8	7.1	7.5	5.7	7.1
\$ 50,000 to \$ 59,999	28.4	19.1	20.4	20.0	20.4
\$100,000 to \$199,999	7.5	12.6	11.1	2.9	11.1
\$200,000 and Over	9.4	9.7	8.6	2.9	8.8
Total	100.00	100.00	100.00	100.00	100.00

*Statistical test: Age of operator and gross sales; computed chi-square 42.78, critical chi-square at .01 probability 38.93.

his immediate family (Table 12). Fifty-two percent of the businesses employed more than two workers but only slightly over 4 percent had more than nine workers. There was no significant difference between number of employees hired and age of operator.

Younger operators transacted more business than the older men but employed no more workers. About 36 percent of the operators employed part-time workers. In 56 percent of these situations, only one person was hired. It is concluded, therefore, that in most instances, retail and personal service firms in this area offer employment mainly to full-time workers. Hence, they provide employment opportunity to the type of worker who wants a permanent job.

Conditions of Employment and Characteristics of Workers

Number Employed and Wages Paid

Data were obtained on 2,756 employees who were hired by the operators of retail and personal service establishments in 1959. Some of these workers were the wives or children of the operators and received no direct wages. The fact that their services were available made it unnecessary for the operator to hire additional help. From the standpoint of the employer, however, the availability of these workers saved a direct outlay of cash to obtain their services.

To expand the 2,756-worker sample in the survey to the total number in the 31-county area, the following assumption was made that the number of employees hired by the various types of firms for which data were obtained would bear the same ratio to their volume of business as the number of employees bore to the total volume of business done by that type of firm in the area. The firms whose operators were interviewed had about 16 percent of the volume of business done by all similar establishments in the area in 1959. Therefore, it was assumed that information was gathered on about 16 percent of the employees. The resulting multiplier to expand the sample to represent the universe was 6.357. The total number employed, therefore, was 17,519.

The census of retail business shows that in 1958 there were 12,012 employees. The following facts may explain all or a considerable part of the difference. First, the census data were obtained for the week of November 15. This procedure excluded most if not all of the part-time workers who were included in the survey. These part-time workers represented about 18.4 percent of the total number. If these workers were included in the census data, the number would be expanded from 12,012 to 14,721. Second, the census shows the number of paid workers. More than one-sixth (16.9 percent) of the workers enumerated in the survey were members of the operator's family, who, in most instances, were not paid salaries. If these people were included, the census data would expand from 14,721 to 17,715 workers, which is close to the 17,519 workers estimated from the survey data.

TABLE 12 -- NUMBERS OF FULL-TIME AND PART-TIME WORKERS EMPLOYED IN RETAIL AND SERVICE BUSINESSES, CLASSIFIED BY AGE OF OPERATOR

Item	Age of Operator*				Total
	Under 30	30-44	45-64	65 and Over	
Number of Operators	53	309	397	35	794
	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>
Percentage of Operators Reporting -					
Full-time Employees:**					
1	13.2	13.0	14.6	28.6	14.5
2	28.3	29.4	36.3	45.6	33.5
3	18.9	19.7	16.1	8.6	17.4
4	11.3	14.6	12.1	5.7	12.7
5	11.3	4.5	5.3	5.7	5.4
6 to 9	13.2	13.6	12.1	2.9	12.3
10 and Over	3.8	5.2	3.5	2.9	4.2
Total	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>
Part-time Employees:					
None	60.4	62.8	64.5	74.3	64.0
1	22.6	19.4	20.9	17.1	20.3
2	13.2	8.1	9.3	5.7	8.9
3	3.8	5.2	2.3	....	3.4
4 and Over	....	4.5	3.0	2.9	3.4
Total	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>

*Statistical test: Age of operator and whether operator employed more full-time workers; computed chi-square 28.06, critical chi-square at .05 probability 28.87.

**Includes the operator.

In estimating wages paid to employees in the area, it was assumed that payments by all firms had the same relationship to total sales that wages bore to the total sales of the sample firms. The resulting multiplier was the same as that used in determining the total number of employees (6.357). By this procedure, the wages paid to all employees in 1959 were \$27,435,000.

The census data showed a total payroll of \$24,849,000 for 1958. Since the total retail sales were estimated to be about 3 percent greater in 1959 than in 1958, and more workers were required to take care of the increased volume, the estimate of \$27,435,000 in 1959 was considered to be closely comparable to the figure reported in the census.

The estimated total number of employees hired by various types of firms in the Ozark area varied from 190 for the farm supply and agricultural firms to 2,372 for restaurants (Table 13). Three of the four types of firms that hired the most employees in relation to their total volume of business also derived the largest share of their business from nonresidents (tourists). It was concluded, therefore, that an increase in the tourist trade would provide more jobs in retail and personal service firms than would be made available if business activity were increased through expansion of purchases by such local residents as farmers. For example, one worker was hired for each \$52,632 of business done by operators selling farm supplies and agricultural products, whereas almost 9 workers were hired by the operators of restaurants to handle the same volume of business.

Number Employed to Cater to Tourists

The number of employees hired as a result of the tourist trade can only be approximated, because workers are not hired to serve specific groups. However, if it is assumed that an employee is hired to sell merchandise or to provide services that result in profits, it is logical to conclude that without the extra business fostered by the tourist trade some of the employees would not be needed. Furthermore, there is a relationship between the number of employees and the volume of business each can handle efficiently for different types of business activities. If this relationship is fairly constant, the number of employees hired as a result of increases in the tourist trade will be approximately proportional to the volume of business per worker. Based on this premise, an estimated 5,321 employees were hired as a result of the tourist trade (Table 14). Although tourists contributed about 21 percent of all the business done in the area, it was estimated that over 30 percent of the employees owed their jobs to this activity. More than 53 percent of the workers who were hired as a result of the tourist trade were employed by operators of restaurants, motels, or hotels. Because most of the employees of these firms are women (65.7 percent), it is presumed that the tourist trade provides jobs for members of families who might otherwise be unemployed.

TABLE 13 -- NUMBER OF EMPLOYEES, VALUE OF RETAIL SALES, AND WAGES PAID BY TYPES OF RETAIL FIRMS

Type of Firm	Number of Employees*	Value Retail Sales	Wages Paid	
		1,000 Dollars	Percent	1,000 Dollars
Groceries	1,829	58,000	4.9	2,861
General Merchandise	1,711	31,000	6.3	1,947
Apparel and Accessories	578	11,000	6.2	684
Drugs	395	7,000	10.4	728
Taverns, Liquor Stores and Bars	425	5,500	9.1	502
Restaurants	2,372	14,000	23.0	3,222
Furniture and Home Furnishings	372	10,000	7.7	766
Lumber, Building Materials and Hardware	1,105	32,000	8.3	2,648
Automotive Dealers and Garages	1,775	60,000	9.1	5,487
Gasoline Service Stations	1,295	30,000	7.0	2,108
Farm Supplies and Agricultural Products	190	10,000	4.2	415
Amusements	887	5,000	10.5	526
Other Retail Stores	1,475	20,000	11.8	2,360
Motels and Hotels	1,785	14,000	6.7	931
Personal Service	1,325	12,000	18.8	2,250
Total	17,519	319,500	8.6	27,435

*These data were derived by expanding the information obtained by interviewing representative operators to represent the entire retail and service trade in the area. The sampling rate was 1 to 6.357. The number of employees hired includes part-time help as well as relatives who were not paid a wage.

TABLE 14 -- ESTIMATED NUMBER OF EMPLOYEES HIRED BY VARIOUS TYPES OF RETAIL AND PERSONAL SERVICE FIRMS TO SERVICE RESIDENT AND NON-RESIDENT CUSTOMERS

Type of Firm	Total Number of Employees*	Employed by Operators to Provide Service to -			
		Residents		Non-residents	
		Number	Percent of Total	Number	Percent of Total
Groceries	1,829	1,577	86.2	252	13.8
General Merchandise	1,711	1,393	81.4	318	18.6
Apparel and Accessories	578	499	86.4	79	13.6
Drugs	395	350	88.6	45	11.4
Taverns, Liquor Stores and Bars	425	277	65.2	148	34.8
Restaurants	2,372	1,224	51.6	1,148	48.4
Furniture, Home Furnishings Lumber, Building Materials and Hardware	372	325	87.4	47	12.6
Automotive Dealers and Garages	1,105	960	86.9	145	13.1
Gasoline Service Stations	1,775	1,495	84.2	280	15.8
Farm Supplies and Agricultural Products	1,295	887	68.5	408	31.5
Amusements	190	174	91.5	16	8.4
Other Retail Stores	887	593	66.9	294	33.1
Motels and Hotels	1,475	1,099	74.5	376	25.5
Personal Service	1,785	80	4.5	1,705	95.5
	1,325	1,265	95.5	60	4.5
Total	17,519	12,198	69.6	5,321 **	30.4

*These estimates were made by expanding the sample to the volume of business of the entire retail and service trade in the area and calculating the number of employees required to take care of that volume. The sampling rate was 1 to 6.357. The number of employees includes part-time help as well as relatives who were not paid a wage.

**34.3 percent were males and 65.7 percent females.

Wages paid to employees who cater to tourists. - The same assumptions that were used in estimating the number of employees hired as a result of the tourist trade were used in estimating the wages paid to these workers. The amount was \$6,119,000 (Table 15). It was approximately 22 percent of all wages paid by operators of retail and personal service establishments in the area. This figure (22 percent of wages) is less than the 30 percent estimated for the number of workers hired (Table 14). However, the estimate of wages may be considerably lower than the actual compensation of employees. Wages paid to some such employees as waitresses were included, but no value was added for tips. Several operators of restaurants indicated that tips amounted to as much as the wages paid. Since payments to restaurant employees represented more than 25 percent of all wages growing out of the tourist trade, a doubling of the payments to waitresses would raise the income of workers derived from the tourist trade to more than 25 percent of the total. Because no firm figure was available on the actual value of tips, it was considered inadvisable to accept the 25 percent figure. The \$6,119,000 estimate in Table 15 probably is appreciably below the actual return.

Conditions of Employment

Residence of employees: About 97 percent of the employees lived in the county in which they worked and had resided there prior to the date they were hired. Expansion in the volume of retail and service business has provided additional jobs to local people. It is concluded, therefore, that a further increase in trade resulting from additional tourists would provide comparable job opportunities to the local residents.

Length of employment: The operators who were interviewed indicated that almost 82 percent of their hired workers were employed full time (Table 16). The proportion varied from 59 percent for amusement firms to 97 percent for farm supply and agricultural product firms. Part time help was usually for less than 200 days a year. The most frequent employers of part time help were the operators of amusement firms. The relatively high percentage of workers kept full time (59.3 percent) was not expected because of the seasonality of the tourist business. Employment of relatives or members of families may explain this tendency to keep workers full time. The saving from discharging this type of help is not great.

The fact that almost 82 percent of the employees of retail and personal service firms were hired full time indicates that these operators have provided considerable employment stability in the local economy.

Unfortunately, the tourist business is seasonal. Normally it is associated with considerable seasonal variation in employment. Yet, in this area, employment has not varied nearly as much as has the number of visitors. For example, nearly 65 percent of the employees of motel and hotel operators were hired full time, whereas the volume of business of these firms was more than four times greater in the summer months than in the winter quarter of 1959.

TABLE 15 -- VALUE OF WAGES PAID TO EMPLOYEES WHO SERVICED RESIDENTS AND NON-RESIDENTS, BY TYPES OF FIRMS

Type of Firm	Total Wages Paid*	Wages Paid by Operators to Provide Service to -			
		Residents		Non-residents	
	1,000 Dollars	1,000 Dollars	Percent of Total	1,000 Dollars	Percent of Total
Groceries	2,861	2,466	86.2	395	13.8
General Merchandise	1,947	1,585	81.4	362	18.6
Apparel and Accessories	684	591	86.4	93	13.6
Drugs	728	645	88.6	83	11.4
Taverns, Liquor Stores and Bars	502	327	65.2	175	34.8
Restaurants	3,222	1,663	51.6	1,559	48.4
Furniture, Home Furnishings	766	669	87.3	97	12.7
Lumber, Building Materials and Hardware	2,648	2,301	86.9	347	13.1
Automotive Dealers and Garages	5,487	4,620	84.2	867	15.8
Gasoline Service Stations	2,108	1,444	68.5	664	31.5
Farm Supplies and Agricultural Products	415	380	91.6	35	8.4
Amusements	526	352	66.9	174	33.1
Other Retail Stores	2,360	2,072	87.8	288	12.2
Motels and Hotels	931	52	5.6	879	94.4
Personal Service	2,250	2,149	95.5	101	4.5
Total	27,435	21,316	77.7	6,119	22.3

*Data derived by expanding the information obtained by interviewing representative operators to represent the entire retail and service trade in the area. The sampling rate was 1 to 6.357. Includes wages paid to full- and part-time workers.

TABLE 16--DISTRIBUTION OF EMPLOYEES BY DAYS EMPLOYED IN 1959 AND BY TYPE OF FIRM

Type of Firm	Number of Employees*	Employee Who Worked			Total
		Less Than 200 Days	200 to 299 Days	Full- Time	
		<u>Percent</u>	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>
Groceries	1,829	14.5	4.0	81.5	100.0
General Merchandise	1,711	17.6	2.5	79.9	100.0
Apparel and Accessories	578	10.0	....	90.0	100.0
Drug Stores	395	5.6	14.4	80.0	100.0
Taverns, Liquor Stores and Bars	425	12.7	1.8	85.5	100.0
Restaurants	2,372	14.5	1.1	84.4	100.0
Furniture, Home Furnishings	372	5.6	2.2	92.2	100.0
Lumber, Building Materials and Hardware	1,105	6.6	1.0	92.4	100.0
Automotive Dealers and Garages	1,775	3.7	1.0	95.3	100.0
Gasoline Service Stations	1,295	14.8	.9	84.3	100.0
Farm Supplies and Agricultural Products	190	2.8	.6	96.6	100.0
Amusements	887	40.7	....	59.3	100.0
Other Retail Stores	1,475	22.2	6.7	71.1	100.0
Motels and Hotels	1,785	24.4	11.0	64.6	100.0
Personal Service	<u>1,325</u>	<u>9.4</u>	<u>1.2</u>	<u>89.4</u>	<u>100.0</u>
Total	17,519	15.2	3.2	81.6	100.0

*Data derived by expanding the information obtained from the sample of operators of retail and personal service firms. The expansion factor was 6.357.

Characteristics of Employees

Sex: The economic growth of any area depends upon job opportunities and how fully the labor and other resources are employed. Recently, women have entered the labor market in increasing numbers. To fully utilize the labor force in any area job opportunities should be provided for both sexes. In the Ozark area, retail and personal service firms have provided opportunities equally to both. In 1959, only slightly more than 50 percent of the employees were male (Table 17).

Certain types of firms employ many more men than women, but the converse is true in other firms. For example, 90 percent of the employees of automotive dealers and garages were males, whereas less than 5 percent of the employees of restaurants were males. Women were hired more often than men to

TABLE 17 -- DISTRIBUTION OF EMPLOYEES BY SEX AND BY TYPE OF EMPLOYING FIRM, OZARKS OF MISSOURI, 1959

Type of Firm	Total Employees*		
	Both Sexes	Percentage of Total	
		Male	Female
	Number	Percent	Percent
Groceries	1,829	51.7	48.3
General Merchandise	1,711	33.9	66.1
Apparel and Accessories	578	33.3	66.7
Drug Stores	395	25.8	74.2
Taverns, Liquor Stores and Bars	425	42.5	57.5
Restaurants	2,372	4.8	95.2
Furniture, Home Furnishings	372	73.7	26.3
Lumber, Building Materials, Hardware	1,105	84.1	15.9
Automotive Dealers and Garages	1,775	90.0	10.0
Gasoline Service Stations	1,295	87.4	12.6
Farm Supplies and Agri- cultural Products	190	82.4	17.6
Amusements	887	53.5	46.5
Other Retail Stores	1,475	70.8	29.2
Motels and Hotels	1,785	20.2	79.8
Personal Service	1,325	57.8	42.2
Total	17,519	50.5	49.5

*Data derived by expanding the information obtained by interviewing representative operators to represent all of the retail and service firms. The sampling rate was 1 to 6.357.

work in restaurants, general merchandise, apparel, accessory, and drug stores, taverns, liquor stores, bars, and motels and hotels. Men were hired more often than women to work in furniture and grocery stores, lumber yards, hardware stores, garages, gasoline service stations, farm supply stores, agricultural product receiving and processing plants, amusement places, and other types of retail businesses.

Age of employees. - The employees of retail and personal service firms were considerably younger than the operators of these establishments. About 15 percent of the hired workers were under 20 years of age (Table 18). None of the operators of these firms were as young as this. Forty-one percent of the employees of all types of businesses were from 20 to 39 years of age and almost 40 percent were between 40 and 59. Less than 5 percent of the employees were more than 60 years of age.

Usually, retailing is believed to require less physical effort than other lines of work. Yet job opportunities for people past 60 years of age seem to be limited in this area. Only amusement places hired a considerable number of people who were past 60 years of age. Most of these elderly people were employed as part time workers. A previous study made in the eastern Ozark area in 1956 showed that nearly 32 percent of the households having incomes of less than \$2,000 also had male heads who were over 64 years of age.⁴ It is doubtful whether the tourist trade in the area will expand sufficiently to permit employment of a substantial number of this age group.

The operators of drug stores and gasoline service stations most often hired workers who were under 20 years of age. Drug stores usually hired girls, while gasoline service stations hired boys.

Work Assignments. - Employers were asked to indicate the job performed by each employee and to rate the degree of training he considered desirable for each to handle the position efficiently. Some of the assignments required either formal education, trade school training, or several years of apprenticeship. Other positions were filled without even asking the educational background or experience of the worker. The positions were separated into three groups that corresponded rather closely to the operators' ratings. These were designated as nonskilled, semiskilled, and managerial positions. The major assignments in the nonskilled group included tasks performed by maids, waitresses, clerks, and gasoline station attendants. Those classified as semiskilled included tasks performed by bookkeepers, cashiers, mechanics, plumbers, butchers, cooks, and various types of repair men. Jobs classified as managerial were those assigned to assistant managers, sales managers, and department managers.

⁴Bird, Miller and Turner, op. cit., pp. 42-43.

TABLE 18 -- DISTRIBUTION OF EMPLOYEES BY AGE AND BY TYPE OF EMPLOYING FIRM

Type of Firm	All Employees *	Age of Employees				Total Percent
		Under 20	20-39	40-59	65 and Over	
		Number	Percent	Percent	Percent	
Groceries	1,829	21.2	37.4	37.1	4.3	100.0
General Merchandise	1,711	19.4	31.9	44.2	4.5	100.0
Apparel and Accessories	578	8.8	33.3	56.1	1.8	100.0
Drug Stores	395	46.2	28.8	23.1	1.9	100.0
Taverns, Liquor Stores and Bars	425	11.1	50.8	34.9	3.2	100.0
Restaurants	2,372	20.1	31.7	43.8	4.4	100.0
Furniture, Home Furnishings Lumber, Building Materials and Hardware	372	4.2	48.4	42.1	5.3	100.0
Automotive Dealers and Garages	1,105	8.3	43.3	40.5	7.9	100.0
Gasoline Service Stations	1,775	4.7	53.2	37.8	4.3	100.0
Farm Supplies and Agricultural Products	1,295	22.6	52.6	23.3	1.5	100.0
Amusements	190	8.0	45.7	43.1	3.2	100.0
Other Retail Stores	887	14.3	34.3	37.1	14.3	100.0
Motels and Hotels	1,475	2.2	40.0	55.6	2.2	100.0
Personal Service	1,785	10.4	30.2	53.3	6.1	100.0
	1,325	6.7	48.9	38.8	5.6	100.0
Total	17,519	14.6	41.0	39.9	4.5	100.0

*Data derived by expanding the information obtained by interviewing representative operators to represent all of the retail and service firms in the area. The sampling rate was 1 to 6.357.

Approximately 62 percent of the jobs performed by employees of retail and personal service firms in the Ozark area were classified as nonskilled and 21 percent as semiskilled (Table 19). Only 17 percent were classified as managerial.

More than 52 percent of the nonskilled employees were listed as clerks, and more than 33 percent of the semiskilled workers were listed as mechanics.

The fact that many of the jobs in retail and personal service firms require very little training means that an expansion in these fields would provide job opportunities that could be filled by local people.

Employee's kinship to operator. - Seventy-eight percent of the employees of firms where interviews were made were not related to the operator; twenty-two percent were related (Table 19). Most of the employees who were related were either the husbands or wives of the operators.

Amount Paid to Full Time Workers

Also important, along with new jobs that will exist if tourist expenditures are increased in the area, are the wage rates that will be paid. Usually, wages are quoted in terms of rate per hour, per day, per week, per month, or per year. From the standpoint of the worker, the annual rate was considered most significant. At the time of the survey, each employer was asked how much he was paying his workers and what task each performed. The employees were grouped by sex, type and duration of job, and amount paid during the year. Because the wage rate paid for sales and personal service employees is about the same in each establishment, no attempt was made to separate the firms according to the effect of the tourist trade on wage rates. All types of firms were included in the income calculation.

Usually, unskilled workers are paid a lower rate than those with skills. Similarly, women are paid at a lower rate than men. This situation also exists in the Ozark area. The average payment per male worker per year was \$2,928; the average per female worker was \$1,840 (Table 20). Semiskilled workers were paid about \$500 more per year than those without skills. Managerial workers were paid about \$500 more per year than semiskilled workers.

The average amount paid per year for a nonskilled male worker was \$2,618, but the range was from \$600 to \$6,000. However, it should be kept in mind that these people perform a wide variety of tasks. The average wage paid for a particular type of job varied less than \$50 a year.

Nonskilled female workers received about \$900 less (\$1,715) than male workers (\$2,618). Their payments ranged from \$390 per year to \$3,700, a wider range than for male workers. Part of this difference may have been due to non-reporting of benefits that certain female workers received. For example, the tips received by waitresses were not reported. Also, many of the maids were provided transportation to and from their jobs.

TABLE 19--DISTRIBUTION OF EMPLOYEES BY RELATIONSHIP TO OPERATORS OF BUSINESSES AND BY TYPE OF JOB PERFORMED

Type of Job	All Employees*	Relationship to Operator**				Total
		Husband or Wife	Children	Other Relative	Not Related	
		Number	Percent	Percent	Percent	
Unskilled:						
Maid	534	3.6	13.1	3.6	79.7	100.0
Waitress	1,297	2.0	4.4	1.0	92.6	100.0
Clerk	5,690	10.2	5.8	5.4	78.6	100.0
Gasoline Station Attendant	1,392	.9	5.9	9.6	83.6	100.0
Others	1,907	.7	1.0	1.0	97.3	100.0
Total	10,820	6.0	5.2	4.5	84.3	100.0
Semi-skilled:						
Bookkeeper	572	17.8	4.4	2.2	75.6	100.0
Cashier	235	10.8	....	5.4	83.8	100.0
Mechanic	1,233	1.0	1.0	1.0	97.0	100.0
Plumber	223	....	....	....	100.0	100.0
Butcher	146	....	13.0	....	87.0	100.0
Cook	528	1.2	3.6	....	95.2	100.0
Repair Work	140	....	4.5	....	95.5	100.0
Others	565	....	1.1	6.7	92.2	100.0
Total	3,642	4.0	2.4	2.1	91.5	100.0
Managerial:						
Assistant Manager	2,173	53.5	11.4	14.6	20.5	100.0
Sales Manager	814	.8	8.6	.8	89.8	100.0
Department Manager	70	....	9.1	9.1	81.8	100.0
Total	3,057	38.3	10.6	10.8	40.3	100.0
GRAND TOTAL	17,519	11.2	5.6	5.1	78.1	100.0

*Data derived by expanding the information obtained by interviewing representative operators to represent the entire retail and service trade in the area. The sampling rate was 1 to 6.357.

**Statistical tests: Employee related to operator by 3 major type of workers; computed chi-square 504.240, critical chi-square at .05 probability 5.991; employee related to operator (excluding wife or husband) by 3 major type of workers; computed chi-square 197.629, critical chi-square at .05 probability 9.448.

TABLE 20--RANGE AND AVERAGE WAGES PAID FULL-TIME WORKERS PER YEAR BY SEX AND BY TYPE OF JOB IN RETAIL AND SERVICE FIRMS

Type of Job	Amount Paid a Full-Time Worker Per Year			
	Male		Female	
	Range Dollars	Average Dollars	Range Dollars	Average Dollars
Unskilled:				
Maid	*	*	750 to 2,400	1,360
Waitress	*	*	390 to 2,800	1,545
Clerk	1,000 to 6,000	2,594	900 to 3,000	1,872
Gasoline Station Attendant	1,500 to 4,000	2,641	2,200 to 2,600	2,450
Others	600 to 6,000	2,637	700 to 3,700	1,582
Average	600 to 6,000	2,618	390 to 3,700	1,715
Semi-skilled:				
Bookkeeper	1,800 to 4,200	2,735	800 to 4,000	2,540
Cashier	1,875 to 6,000	3,146	*	*
Mechanic	1,875 to 6,000	3,146	*	*
Plumber	1,800 to 7,000	3,252	*	*
Butcher	2,200 to 4,250	3,158	*	*
Cook	*	*	900 to 3,500	1,993
Repair Work	2,100 to 4,250	3,216	*	*
Other	2,200 to 10,000	3,366	600 to 4,200	2,250
Average	1,800 to 10,000	3,181	600 to 4,200	2,239
Managerial:				
Assistant Manager	1,000 to 6,000	3,765	*	*
Sales Manager	2,000 to 6,000	3,567	*	*
Department Manager	3,000 to 6,000	4,720	*	*
Average	1,000 to 6,000	3,657	*	*
Average All Employees	1,000 to 10,000	2,928	600 to 4,200	1,840

*Data not available

The average wage paid female gasoline station attendants was larger than that paid to other nonskilled female workers. This situation may have existed because of dual work assignments, such as tending the pumps and keeping the books.

In the semiskilled category, the average wage paid to male workers was \$3,181 a year. The average for female workers was \$2,239. The wages paid by type of job in this group varied more than in the nonskilled category.

All those managerial jobs listed were held by men. The average salary paid per year was \$3,657. Although many women in the survey were holding managerial positions, each was related to the operator of the firm or was operating the business.

Employees' Prior Residence -- Rural or Nonrural

To determine whether opportunities were available to rural residents in skilled, semiskilled or managerial jobs, each employer was asked to indicate whether his employees' residences were rural or nonrural prior to employment. About 97 percent were local residents.

About 41 percent of the employees who were hired in 1959 resided in a rural area prior to their current employment (Table 21). There was no significant difference between the percentages of employees who had had a rural residence and were hired for unskilled (41.9 percent) and semiskilled work (44.1 percent). However, there was a significant difference in the proportion hired for managerial jobs (34.2 percent) and those hired for either nonskilled or semiskilled work (42.5 percent). This difference is probably accounted for by the fact that many relatives of operators attained managerial positions. Since the operator usually lived in town, his children were classed as town residents. When this fact is considered, it is concluded that rural people have not been at a disadvantage as compared with town residents in obtaining the better paying jobs with retail and personal service firms in the area. Since 41 percent of the employees were from the open country, rural people apparently profited considerably from expansion of the tourist trade and will probably continue to do so. In 1959, in the Ozark area, about \$6,119,000 in wage payments resulted from the tourist trade. If it is assumed that 41 percent of this amount went to workers who were previous residents of the open country, the rural population profited by \$2,509,000 in the form of wages. This represents more than 3.7 percent of the total amount of money spent by tourists in 1959.

Source of Goods Merchandised

Most retailers do not know the exact origin of the goods they sell. However, many of those interviewed were acquainted with the wholesalers who served them and knew whether the articles they purchased were produced in the Ozark area. For example, the operators of restaurants and food stores knew the source of many of their food items, such as dairy, poultry, and other meat products. Each operator was asked to name the

TABLE 21--NUMBER AND PERCENTAGE OF EMPLOYEES OF RETAIL AND SERVICE FIRMS, BY RESIDENCE PRIOR TO PRESENT EMPLOYMENT, 1959

Item	All Employees*	Employees Residence Before Present Employment		Total
		Rural**	Nonrural	
	Number	Percent	Percent	Percent
Unskilled				
Maid	534	40.8	59.2	100.0
Waitress	1,297	32.8	67.2	100.0
Clerk	5,690	39.4	60.6	100.0
Gasoline Station Attendant	1,392	42.2	57.8	100.0
Other Occupations	<u>1,907</u>	<u>55.5</u>	<u>44.5</u>	<u>100.0</u>
Total or Average†	10,820	41.9	58.1	100.0
Semiskilled				
Bookkeeper	572	29.9	70.1	100.0
Cashier	235	30.6	69.4	100.0
Mechanic	1,233	54.3	45.7	100.0
Plumber	233	44.1	55.9	100.0
Butcher	146	59.1	40.9	100.0
Cook	528	37.0	63.0	100.0
Repair Work	140	28.6	71.4	100.0
Other Occupations	<u>565</u>	<u>48.3</u>	<u>51.7</u>	<u>100.0</u>
Total or Average†	3,642	44.1	55.9	100.0
Managerial				
Assistant Manager	2,173	34.0	66.0	100.0
Sales Manager	814	33.9	66.1	100.0
Department Manager	<u>70</u>	<u>45.5</u>	<u>54.5</u>	<u>100.0</u>
Total or Average	3,057	34.2	65.8	100.0
Grand Total or Average	17,519	41.0	59.0	100.0

*Data derived by expanding the information obtained by interviewing representative operators to represent the entire area, retail and service trade. The sampling rate was 1 to 6.357.

**Rural residence is located outside an incorporated city or town or unincorporated place with a population of 100 or more persons.

†Statistical tests: Between three major occupations and employees' residence; computed chi-square 12.095, critical chi-square at .05 probability 5.99. Between two groups, non-skilled, and employees' residence; computed chi-square .851 critical chi-square at .05 probability 3.841.

items he sold which he thought were produced in the Ozark area and the cost to him of each of these items. The replies indicated that in 1959, about 4.9 percent, or \$15,686,000, of the products were produced locally (Table 22). More than 60 percent of this amount was for food items.

About 14 percent of the products marketed through food stores were produced in the Ozark area and 86 percent elsewhere. Although the 14 percent figure may be considered relatively low, it shows the high degree of interdependence of the people in our society. Foods that are grown and processed throughout the world are marketed in almost every store in the Ozarks. Even though more than \$121,756,000 worth of farm products were produced and sold by farmers in this area in 1959, retailers considered that less than \$10,000,000 of their total sales represented locally grown products.

To determine how much of the total value of locally produced goods was sold to tourists, the percentage of sales that retailers attributed to the nonresident trade was applied to the estimated value of locally produced goods, by type of

TABLE 22--VALUE OF RETAIL SALES AND PERCENTAGE THAT LOCALLY PRODUCED GOODS REPRESENTED OF TOTAL SALES, BY TYPE OF FIRM

Type of Firm	All Retail	Goods Produced in	
	Sales	the Ozarks	
	1,000	1,000	
	<u>Dollars</u>	<u>Dollars</u>	<u>Percent</u>
Groceries	58,000	8,062	13.9
General Merchandise	31,000	2,635	8.5
Apparel and Accessories	11,000	330	3.0
Drug Stores	7,000	.....	....
Taverns, Liquor Stores, and Bars	5,500	28	....
Restaurants	14,000	1,544	11.0
Furniture, Home Furnishings	10,000	200	2.0
Lumber, Building Materials, and Hardware	32,000	896	2.8
Automotive Dealers and Garages	60,000	37	....
Gasoline Service Stations	30,000	450	1.5
Farm Supplies and Agricultural Products	10,000	370	3.7
Amusements	5,000	30	.6
Other Retail Stores	20,000	120	.6
Motels and Hotels	14,000	84	.6
Personal Service	<u>12,000</u>	<u>900</u>	<u>7.5</u>
TOTAL	319,500	15,686	4.9

store noted in Table 22. The resulting computations indicated that about \$2,485,000 worth of locally produced goods were sold to tourists in 1959 (Table 23).

The analysis presented in this section shows that local residents have profited considerably from the tourist trade. The expenditures of visitors have given them opportunities to become proprietors of retail firms, to find jobs with firms that cater to tourists, and to sell many of the locally produced products. The data show that 75 percent of the owners of businesses were born in Missouri, most of them in the locality in which they were living at the time of the interview; 72 percent were reared on farms. The additional business that was created through expansion of the tourist trade provided an estimated 5,000 jobs in retail and service firms. These workers were paid over \$6,000,000 in wages. About 97 percent of these employees were recruited locally, and 41 percent lived in the open country. Almost \$2,500,000 worth of locally produced goods were sold to tourists.

TABLE 23--VALUE OF ALL GOODS PRODUCED IN OZARKS AND PERCENTAGE OF LOCALLY PRODUCED GOODS SOLD TO NON-RESIDENTS BY TYPE OF FIRM

Type of Firm	All Goods Produced in Ozarks	Goods Sold to Non-Residents	
	1,000 Dollars	1,000 Dollars	Percent
Groceries	8,062	895	11.1
General Merchandise	2,635	366	13.9
Apparel and Accessories	330	22	6.8
Drug Stores	.....	...	....
Taverns, Liquor Stores, and Bars	28	11	39.3
Restaurants	1,544	848	54.9
Furniture, Home Furnishings	200	80	40.0
Lumber, Building Materials, and Hardware	896	109	12.2
Automotive Dealers and Garages	37	8	21.6
Gasoline Service Stations	450	108	24.1
Farm Supplies and Agricultural Products	370	8	2.2
Amusements	30	2	6.7
Other Retail Stores	120	13	10.8
Motels and Hotels	84	4	4.8
Personal Service	900	11	1.2
TOTAL	15,686	2,485	15.8

BUSINESS CHANGES TO MEET THE
NEEDS OF TOURISTS

The businesses that react most quickly to consumer demand are those that sell goods and services. Keeping ahead of the crowd in meeting the wants of consumers is a must, if a retailer is to remain in business. The merchant who best guesses the wants of the consumer is best able to fulfill these wants. New consumers and their buying habits, as well as changes in the habits of established consumers, need to be recognized and dealt with quickly. An influx of tourists into an area leads to entry of firms that differ from those previously in existence. How well the merchants are able to adapt their facilities to the needs of tourists helps to determine whether they will continue to visit the area.

Tourism is not a new industry in the Ozark area, but its increased size is new. The long depression and World War II held down the number of visitors. After the war, the rapid rise in income, the increase in number of paid vacations, and expansion in the use of automobiles brought many new visitors to the area. One indication of the magnitude of the change is the number of visitors to state parks. In 1950, there were 564,114 visitors, whereas in 1960, 3,053,112 people stopped at these parks (Table 24). This is almost a sixfold increase in the 11-year period. Most of the increase has occurred in the last 3 years.

Not only has the number of tourists increased but so have their demands for more and different services. Old-timers in the resort business speak ruefully of the days in the past when visitors were willing to rough it in a cabin equipped with a minimum of facilities. Today, the visitor demands a cabin that is air conditioned, has television, and affords not only the luxuries of his home but many that he may not have. For example, a motel owner said that one day in late June he closed his swimming pool for repairs and discovered that he was able to rent only half of his motel units that evening.

TABLE 24--NUMBER OF VISITORS AT STATE PARKS IN THE OZARKS
OF MISSOURI, 1950-60*

Year	Visitors	Year	Visitors
	<u>Number</u>		<u>Number</u>
1950	564,114	1956	1,173,041
1951	549,234	1957	1,177,906
1952	869,389	1958	1,285,807
1953	960,452	1959	2,450,844
1954	1,292,900	1960	3,053,112
1955	1,170,091		

*Derived from unpublished data furnished by the Missouri State Park Board.

The following day he completed the repairs and all units were rented, as they had been on the days prior to closing the pool. His 34-unit motel was on a federal highway only 50 yards from a public beach on Lake Taneycomo. Apparently, tourists came to the lake to swim, but not in the lake.

Number and Types of Retailers

Both number and type of retail and service firms in the Ozark area have changed significantly in recent years. One difference is the rapid rise in number and quality of firms that cater to the tourist trade. The 1948 census reported that there were 6,559 retail and service firms in the area.⁵ About 52 percent were classified as automotive dealers, gasoline service stations, restaurants, motels, hotels, liquor stores or taverns, and other types of selected service firms. Most of these firms received a large percentage of their business from travelers and their volume of business has been affected by changes in the number of tourists visiting the area. In 1958, the census showed that there were 7,292 retail and selected service firms in the area.⁶ About 59 percent of these businesses were classified as indicated above. Since 1958, the number of firms has increased rapidly. The Department of Revenue of the State of Missouri reported sales tax returns from 8,466 operators in 1960. Part of the increase may be attributable to the seasonal nature of many business operations. Sales tax data indicate that about 4 percent of all businesses were open during the summer but closed in winter. Most of these firms are largely dependent upon the tourist trade.

To provide a better indication of the changes that have occurred than could be obtained through an analysis of census data, each operator in the 1960 survey was asked to indicate the year in which his present business was established. The answers were tabulated by the year of organization into 10-year intervals starting with 1910. To see whether certain types of businesses were of more recent date than others, they were grouped further into the 15 types used in an earlier analysis of the contribution of the tourist trade to the area.

The operators indicated that about 38 percent of their businesses had been established since the year 1949 (Table 25). Twenty-seven percent were established between 1940 and 1949 and about 16 percent between 1930 and 1939. Only 19 percent of the businesses were established prior to 1930.

Relatively more of the businesses that cater to tourists had been started in recent years than of those whose major customers were local residents. For example, more than 50

⁵United States Census of Business, 1948, Retail Trade, Vol. III, pp. 24.08-24.13 and United States Census of Business, 1948, Selective Service Trade, Vol. VI, Part 2, pp. 25(7-11).

⁶United States Census of Business, 1958, Retail Trade, Vol. II, BC 58-RA 25, pp. 9-17 and United States Census of Business, 1958, Selective Service, Vol. VI, BC 58-5A, pp. 25(8-12).

TABLE 25--DISTRIBUTION OF BUSINESS FIRMS BY PERIOD WHEN THEY WERE ESTABLISHED, OZARKS OF MISSOURI

Type of Business	Operators Interviewed	Period Business Established					
		Prior to 1910	1910 to 1919	1920 to 1929	1930 to 1939	1940 to 1949	1950 to 1960*
	Number	Percent	Percent	Percent	Percent	Percent	Percent
Groceries	115	2.6	7.0	11.3	14.8	27.0	37.3
General Merchandise	88	10.2	9.1	9.1	18.2	26.1	27.3
Apparel and Accessories	23	8.7	4.3	8.7	17.4	21.8	39.1
Drug Stores	18	16.7	16.7	22.2	11.1	11.1	22.2
Taverns, Liquor Stores and Bars	27	....	....	14.8	3.7	33.3	48.2
Restaurants	57	1.8	3.5	....	21.1	28.1	45.5
Furniture, Home Furnishings	38	2.6	2.6	2.6	15.8	28.9	47.5
Lumber, Building Materials and Hardware	60	13.3	10.0	5.0	11.7	36.7	23.3
Automotive Dealers and Garages	60	....	3.3	16.7	8.3	31.7	40.0
Gasoline Service Stations	126	2.4	.8	8.7	19.8	23.0	45.3
Farm Supplies and Agricultural Products	19	5.3	....	31.5	5.3	21.1	36.8
Amusements	17	....	5.9	17.6	29.5	23.5	23.5
Other Retail Stores	22	....	....	4.5	18.2	45.5	31.8
Motels and Hotels	104	2.0	3.0	2.0	14.9	27.6	50.5
Other Service Firms	23	34.9	4.3	13.0	17.4	13.0	17.4
TOTAL	797	5.2	4.7	8.9	15.6	27.2	38.4

*For 1960, includes only those firms that existed on May 1, 1960.

percent of the motels and hotels had been built since 1949, as compared with only 22 percent of the drug stores.

To a certain extent, the large percentage of new businesses established in recent years indicates the impact of tourists on the local economy. Since 1950, there has been no major change in the business activity of the area that has not been associated with tourists. The income of local people from farming, forestry, mining, and manufacturing has not increased appreciably, and the population has decreased 7 percent. Yet the number of retail and personal service establishments was about 32 percent greater in 1960 than in 1950.

To portray the effect of the tourist trade on local institutions, two types of retail firms were selected for detailed analysis. These were motels and restaurants.

Motels

Data were obtained from the inspection reports submitted by every motel operator in the Ozark area to the Department of Public Health and Welfare of the State of Missouri for the years 1951 to June 30, 1960. The information included the size and number of rental units that were added or subtracted each year. Ownership of many of the units had been transferred six or seven times during the period.

Size of Unit

In 1951, there were 380 motels, tourist courts and camps in the Ozark area. On June 1, 1960, there were 925 (Table 26). The growth has been almost constant with a slight increase in the rate in recent years. About 53 percent of the firms had less than 7 rental units in 1960. This percentage has not varied appreciably in the last 10 years. Thirty-four percent and 9 percent had from 7 to 12 and 13 to 21 rental units respectively in 1960. During this 10-year period, 375 operators added an average of four units to the capacity that existed in 1951 or added to units that were put into operation after 1951.

The smaller the initial operation, the less likelihood there was for an increase in its size. For example, the average number of rental units added by operators who have increased the size of their initial business in the last 10 years has been three for those who had 1 to 6 rental units, five for those with 7 to 12, seven for firms with 13 to 21 rental units and sixteen for those with more than 21 units (Table 27). These relationships indicate that an operator who had desired to increase the size of his operations, has a better chance to do so if he bought a relatively large business than if he started with a small one.

Only 75 operators decreased the size of their businesses during the 10 year period. The average decrease was one rental unit. In several instances, the decrease was associated with change in ownership. The new owner selected one of the units as his living quarters, whereas the previous owner had other quarters.

TABLE 26--NUMBER AND PERCENTAGE OF MOTELS, TOURIST COURTS AND CAMPS BY NUMBER OF RENTAL UNITS*

Year	Rental Units								Total	
	1 to 6		7 to 12		13 to 20		21 and Over		Number	Percent
	Number	Percent	Number	Percent	Number	Percent	Number	Percent		
1951	202	53.2	129	33.9	36	9.5	13	3.4	380	100.0
1952	225	54.9	133	32.4	36	8.8	16	3.9	410	100.0
1953	256	55.1	147	31.6	42	9.0	20	4.3	465	100.0
1954	294	55.0	174	32.5	44	8.2	23	4.3	535	100.0
1955	325	54.4	197	33.0	50	8.4	25	4.2	597	100.0
1956	357	53.6	218	32.7	61	9.2	30	4.5	666	100.0
1957	375	52.2	256	35.6	60	8.3	28	3.9	719	100.0
1958	407	52.9	266	34.5	65	8.4	32	4.2	770	100.0
1959	458	52.8	298	34.3	77	8.9	35	4.0	868	100.0
1960**	491	53.1	314	33.9	84	9.1	36	3.9	925	100.0

*Data obtained from inspection reports of the Missouri Department of Public Health and Welfare.
 **Includes only those structures that were completed on May 1, 1960.

TABLE 27--CHANGES IN NUMBER OF RENTAL UNITS PER MOTEL THAT OCCURRED AFTER MOTEL OPENED FOR BUSINESS, 1951 to 1960*

Change in Number of Rental Units Per Motel	Initial Number of Rental Units Per Motel			
	1 to 6	7 to 12	13 to 20	21 and Over
Number of Motels	627	216	69	13
	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>
No Change	51.0	45.3	40.7	15.4
Decreased	4.3	19.0	5.8	23.1
Increased Number To:				
1 to 6 Rental Units	23.0			
7 to 12 Rental Units	20.4	21.8		
13 to 20 Rental Units	1.3	11.1	43.4	
21 and Over Rental Units	.....	2.8	10.1	61.5
TOTAL	100.0	100.0	100.0	100.0

*Data derived from an analysis of the inspection reports for motels, tourist courts, and camps from every operator in the Ozarks made to Missouri Department of Public Health and Welfare.

The number of rental units increased from 2,844 in 1951 to 7,383 in 1960 (Table 28). The rate of increase has slowed down in recent years. For the period 1951-56, the average annual increase was 13 percent; for the period 1956-60, the average was 8 percent. It is assumed that the change in number of rental units is fairly indicative of the increase in number of tourists staying in the area overnight. This assumption is based on the premise that about the same percentage of tourists stayed at motels in 1960 as in 1951.

Types of Facilities

Because motels are used by most of the tourists who stay overnight in the area, it was assumed that a detailed analysis of current facilities would provide some indication of what visitors of this type desire. Consequently, each motel operator was asked to provide more specific information about his business than was asked of the operators of other businesses. Data were obtained on number and type of rental units, facilities available, the percentage occupancy per month, and the amount charged each overnight guest. The purpose was to gain insight into the influence of such facilities as swimming pools, cooking facilities, boats for rent, and playgrounds in attracting tourists.

To determine whether the larger motels provided more service than did the smaller businesses, answers to each of the questions on facilities were grouped by the number of rental units. The results indicated that the larger motels were

TABLE 28--NUMBER OF COMMERCIAL CABINS OR MOTEL ESTABLISHMENTS
IN FOUR RECREATIONAL AREAS, 1951 TO 1960*

Year	Number	Increase From Previous Year
		<u>Percent</u>
1951	2,844	
1952	3,118	9.6
1953	3,587	15.0
1954	4,170	16.3
1955	4,684	12.3
1956	5,338	14.0
1957	5,695	6.7
1958	6,207	9.0
1959	6,852	10.4
1960	7,383	7.7

*Data obtained from reports of the Missouri Department of Public Health and Welfare. For 1960, includes reports of all motels that were open for business on May 1, 1960.

more likely to have swimming pools and seasonal rates than were the smaller businesses (Table 29). However, the smaller motels were more likely to have boating facilities than were the larger firms. This situation existed because motels on lake frontage had fewer rental units than did those away from the lake and on highways. There was no significant relation between number of units and whether the motel had cooking facilities, children's playgrounds, babysitting or guide service, conference or display rooms, a restaurant in or near the unit, or the operator's plans to add facilities in 1960.

Percentage Occupancy

One of the major criteria for measuring the success of any rental business is the proportion of time all facilities available are rented. Motel operators in the Ozark area have not been highly successful in maintaining full use of their facilities, as only 45 percent of their motel units were occupied during the year 1959 (Table 30). However, because of the seasonal nature of the tourist trade, this problem cannot be resolved easily. For example, only 20 percent of the units were rented in January, while 80 percent were rented during July and August. Many of the motel operators rented all of their units during the peak season, but were lucky to rent half of them during the winter period. The operators of large motels were more successful than were the operators with fewer units to rent.

To determine whether certain facilities were preferred by the tourist, the motels were grouped by accommodations and percentage occupancy for the months of January, May, July, and October (Appendix Tables 1 to 4). Each of these months were selected for detailed analysis to represent the seasons of the tourist trade.

For January, motels located on a transcontinental highway had a higher percentage occupancy than those on interconnecting roads. Those on interconnecting roads had a higher percentage of occupancy than those on lakes. There was no significant relationship between the percentage occupancy and type of facilities furnished. However, operators who had the lowest percentage of occupancy were those who most often said they planned to increase the size of their units or add new facilities.

For May, motels that had the highest percentage of occupancy were those with restaurants near their units and boating facilities available. No other facilities had a significant effect on the percentage of occupancy.

Most of the motels had a higher percentage of occupancy in July than in any other month. Only when a restaurant was closer to one motel than to another was there any significant difference in occupancy because of facilities. However, the operators who had the highest percentage of occupancy in July also had seasonal rates.

TABLE 29--PERCENTAGE OF MOTELS WITH SELECTED FACILITIES BY NUMBER OF RENTAL UNITS

Facility	Rental Units per Motel				Total
	1 to 6	7 to 12	13 to 20	21 & Over	
Number of Motels	26	41	22	15	104
	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>
Percentage of Motels with-					
No Cooking Facilities	42.3	26.8	45.5	40.0	36.5
Cooking Facilities	42.3	39.0	45.5	7.0	36.5
Combination	15.4	34.2	9.0	53.0	27.0
Total	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>
No Swimming Pool	96.2	87.8	77.3	66.7	84.6
Swimming Pool	3.8	12.2	22.7	33.3	15.4
Total	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>
No Childrens' Playground	61.5	58.5	31.8	80.0	56.8
Childrens' Playground	38.5	41.5	68.2	20.0	43.2
Total	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>
No Babysitting Service	96.2	87.8	81.8	100.0	90.4
Babysitting Service	3.8	12.2	18.2	...	9.6
Total	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>
No Boating Facilities	65.4	48.8	72.7	100.0	65.4
Boating Facilities	34.6	51.2	27.3	...	34.6
Total	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>
No Guide Service	92.3	80.5	80.8	92.9	85.6
Guide Service	7.7	19.6	19.2	7.1	14.4
total	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>

TABLE 29--Continued

No Conference Room	100.0	97.6	90.9	80.0	94.2
Conference Room	...	2.4	9.1	20.0	5.8
Total	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>
No Display Room	96.2	95.1	95.5	86.7	94.2
Display Room	3.8	4.9	4.5	13.3	5.8
Total	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>
Seasonal Rates	7.7	26.8	27.3	60.0	26.9
No Seasonal Rates	92.3	73.2	72.7	40.0	73.1
Total	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>
No Restaurant	88.5	80.5	90.9	80.0	84.6
Restaurant	11.5	19.5	9.1	20.0	15.4
Total	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>
Distance to Nearest Restaurant:					
Less than 0.6 Mile	38.5	41.5	68.2	53.3	48.1
0.6 to 1 Mile	19.2	14.6	13.6	13.3	15.4
More than 1 Mile	42.3	43.9	18.2	33.4	36.5
Total	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>
Plans for This Year					
No change	84.6	78.0	77.3	86.7	80.8
Add Facilities	15.4	22.0	22.7	13.3	19.2
Total	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>	<u>100.0</u>

TABLE 30--PERCENTAGE OCCUPANCY OF MOTELS OF SPECIFIED SIZES BY MONTHS

Month	Rental Units Per Motel*				
	1 to 6	7 to 12	13 to 20	21 & Over	All Motels
Number of Motel	25	40	22	13	100
	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>
Percentage Occupied in					
January	10	16	26	42	20
February	12	17	26	44	21
March	21	21	31	50	27
April	25	32	46	60	40
May	33	53	63	64	51
June	53	71	78	79	69
July	67	82	87	91	80
August	68	80	88	99	80
September	42	55	66	69	56
October	31	43	52	68	45
November	17	26	37	53	29
December	<u>14</u>	<u>19</u>	<u>29</u>	<u>48</u>	<u>23</u>
Average	33	43	52	64	45

*4 of 104 operators interviewed were unable to furnish a breakdown on occupancy by months.

During October, motels with swimming pools had higher percentages of occupancy than those without. In this instance, location was the important factor rather than the swimming pool as motels with swimming pools were more likely to be located on transcontinental highways. They also had seasonal rates. No other facilities seemed to alter the percentage of occupancy.

In general, it appears that in the Ozark area in 1959, the type of facilities enumerated in Appendix Tables 1 to 4 had little influence on the percentage of occupancy of motel units. No facility materially affected occupancy during all seasons of the year. In the first quarter, nearness to a restaurant was important in determining how many of the units were rented. During the spring quarter, nearness to a restaurant and availability of boating facilities were important factors. In summer, nearness to a restaurant had a significant effect on occupancy.

The motels with seasonal rates in spring, summer, and fall had higher percentages of occupancy than did those without seasonal rates.

During the winter quarter, however, operators who had seasonal rates had lower percentages of occupancy than operators who did not have them. Apparently businessmen patronized motels with constant rates more than they did those with varied rates.

Rates Per Night

The amount charged for two people staying overnight in a motel in the Ozark area is probably as low as anywhere in the United States. The average fee for two persons in the summer of 1959 was \$5.84 for a motel unit with no cooking facilities (Table 31). If cooking facilities were desired, the charge was 13 cents more a night. The price varied from \$2.50 to \$8.50, depending upon location and accommodations. Winter rates averaged about 33 cents less a night than did the summer rates. The rate was \$1.00 for each additional member in the party above two. It was considerably less for one person than for two. Apparently, a higher proportion of the one-party guests were business travelers who receive special consideration in this area.

Volume of Business

More than half of the motels in the Ozark area in 1959 had less than seven rental units (Table 26). None of the operators of these size businesses who were interviewed

TABLE 31--RATES PER NIGHT PER RENTAL UNIT WITH SPECIFIED FACILITIES, SUMMER AND WINTER SEASON, BY SIZE OF RENTING PARTY

Facility and Size of Renting Party	Summer		Winter	
	Range Dollars	Average Dollars	Range Dollars	Average Dollars
Rental Units with - No Cooking Facilities:				
Rental Party:				
1 person	1.50 to 7.00	4.64	1.50 to 7.00	4.35
2 persons	2.50 to 8.50	5.84	2.50 to 8.00	5.51
3 persons	3.00 to 10.00	7.60	3.00 to 9.00	7.03
4 persons	3.00 to 12.00	8.84	3.00 to 11.00	8.22
5 and over	4.50 to 24.00	11.12	4.50 to 24.00	10.37
Cooking Facilities:				
Rental Party:				
1 person	2.50 to 8.50	4.81	2.50 to 7.50	4.69
2 persons	3.50 to 9.00	5.97	2.50 to 10.00	5.67
3 persons	3.50 to 12.00	7.41	3.50 to 11.00	7.14
4 persons	4.50 to 14.00	8.53	4.00 to 13.00	8.06
5 and over	5.00 to 18.00	11.36	5.00 to 15.00	10.81

reported gross sales greater than \$10,000 (Table 32). As the number of rental units increased, gross sales increased. About 90 percent of the motel operators who had more than 20 units had gross sales greater than \$20,000. Only 4 percent of all businesses in the Ozark area had this large a volume of sales in 1959. Why this condition existed was not ascertained. Since most of the units are owned by local residents, initial capital may have been limited.

Restaurants

The restaurant business is closely related to the motel business in catering to the needs of tourists. Fifty-seven restaurant operators were interviewed in the survey. About 30 percent of them said they had gross sales of less than \$20,000 in 1959. Another 38 percent had gross sales from \$20,000 to \$49,999 and 32 percent had gross sales in excess of \$50,000.

To indicate what effect the tourist business may have had on the restaurant trade in the area, data were obtained as to the average number of guests served per restaurant in January and July. It was assumed that the number served in January would be indicative of the local trade throughout the year, while the number served in July would include both the local and the tourist business. The average number of guests served breakfast per restaurant in January was 20; the July average was 29 (Table 33). This was only a 45-percent increase, whereas the number served lunch was 77 percent greater in July than in January and the number served dinner was 152 percent greater in July than in January. Apparently, many of the people traveling in this area either skipped breakfast and lunch or ate in their rooms or at roadside parks.

TABLE 32--VOLUME OF BUSINESS BY NUMBER PER MOTEL OR RENTAL UNITS

Volume of Business	Number of Rental Units*				Motels
	1 to 6	7 to 12	13 to 20	21 & Over	
	<u>Number</u>	<u>Number</u>	<u>Number</u>	<u>Number</u>	
Less than \$ 5,000	22	11	0	1	34
\$ 5,000 to \$ 9,999	4	16	3	0	23
\$10,000 to \$19,999	0	12	9	0	21
\$20,000 & Over	<u>0</u>	<u>2</u>	<u>10</u>	<u>14</u>	<u>26</u>
Total	26	41	22	15	104

*Statistical test: Volume of Business by size of motel; computed chi-square 95.773, critical chi-square at .01 probability 23.209.

TABLE 33--NUMBER OF GUESTS SEATED PER DAY FOR SPECIFIED MEALS
BY VOLUME OF BUSINESS OF RESTURANTS

Month and Meal	Volume of Business			Average Number
	Less than \$20,000 Number	\$20,000 to \$49,999 Number	\$50,000 & Over Number	
Number Seated Per Day in January for-				
Breakfast	13	20	23	20
Lunch	28	46	55	43
Dinner	17	27	42	29
Number Seated Per Day in July for-				
Breakfast	18	37	25	29
Lunch	39	72	115	76
Dinner	35	54	131	73

The restaurant operators who had the smallest volume of business had the least seasonal variation in trade. Apparently they catered to their local customers.

The average price charged for meals in the Ozark area was only 2 to 5 cents greater in summer than in winter (Table 34). There was no relation in volume of business done by the restaurant operators and prices charged per meal except for dinners. The restaurant operators with the largest volume of business received about 40 cents more for their dinners. However, even these prices were reasonable; they amounted to only \$1.34 per person.

It has been shown that the retail trade has adjusted rapidly to an increase in the tourist trade. This adjustment has brought forth an increase in the number of small businesses in the area. It is concluded, therefore, that the impact of an increase in the tourist trade has been to foster the growth of many small businesses throughout the area rather than the growth of a few large concerns. Apparently, the services demanded by tourists can be provided successfully by small businesses.

Many different types of facilities have been provided by motel operators. However, no single facility seemed to alter the percentage of occupancy of the motel appreciably. The fees charged for staying overnight are reasonable (less than \$6 for two persons) and the prices charged for meals are modest (70 cents for breakfast, 90 cents for lunch, and \$1.35 for dinner).

TABLE 34 -- PRICES PAID PER GUEST FOR SPECIFIED MEALS, BY VOLUME OF BUSINESS OF RESTAURANTS

Month and Meal	Volume of Business		
	Less than \$20,000	\$20,000 to \$49,999	\$50,000 and Over
Prices Paid in -	<u>Dollars</u>	<u>Dollars</u>	<u>Dollars</u>
January:			
Breakfast	0.67	0.70	0.67
Lunch	.81	.76	.90
Dinner	.86	.88	1.30
July:			
Breakfast	.71	.72	.71
Lunch	.84	.78	.93
Dinner	.98	.89	1.34

APPENDIX TABLE 1--PERCENTAGE OF MOTELS WITH SPECIFIED FACILITIES
BY PERCENTAGE OF RENTAL UNITS OCCUPIED IN JANUARY 1959

Type of Facility	Percentage of Units Occupied Per Motel			
	Less than 20	20 to 49	50 and Over	All Motels
Number of Motels	59	25	16	100
	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>
Percentage of Motels With:				
Seasonal Rates	18.6	44.0	31.3	27.0
No Seasonal Rates	<u>81.4</u>	<u>56.0</u>	<u>68.7</u>	<u>73.0</u>
Total	100.0	100.0	100.0	100.0
Location on Lakes	76.3	20.0	...	50.0
Location on Transcontinental Highway	8.5	36.0	56.3	23.0
Location on Interconnecting Highway	<u>15.2</u>	<u>44.0</u>	<u>43.7</u>	<u>27.0</u>
Total	100.0	100.0	100.0	100.0
Restaurant	18.6	80.0	18.8	16.0
No Restaurant	<u>81.4</u>	<u>20.0</u>	<u>81.2</u>	<u>84.0</u>
Total	100.0	100.0	100.0	100.0
Restaurant Within 0.1 Mile	35.6	52.0	68.8	45.0
Restaurant Within 0.2 to 0.9 Mile	18.6	28.0	12.5	20.0
Restaurant 1 Mile or Over	<u>45.8</u>	<u>20.0</u>	<u>18.7</u>	<u>35.0</u>
Total	100.0	100.0	100.0	100.0

APPENDIX TABLE 1--continued.

Swimming Pool	18.6	12.0	12.5	16.0
No Swimming Pool	<u>81.4</u>	<u>88.0</u>	<u>87.5</u>	<u>84.0</u>
Total	100.0	100.0	100.0	100.0
Childrens' Playground	59.3	20.0	31.3	45.0
No Childrens' Playground	<u>40.7</u>	<u>80.0</u>	<u>68.7</u>	<u>55.0</u>
Total	100.0	100.0	100.0	100.0
Babysitting Service	15.3	4.0	...	10.0
No Babysitting Service	<u>84.7</u>	<u>96.0</u>	<u>100.0</u>	<u>90.0</u>
Total	100.0	100.0	100.0	100.0
Plans for This Year:				
Add Facilities	28.8	4.2	12.5	10.0
No Change	<u>71.2</u>	<u>95.8</u>	<u>87.5</u>	<u>90.0</u>
Total	100.0	100.0	100.0	100.0

APPENDIX TABLE 2--PERCENTAGE OF MOTELS WITH SPECIFIED FACILITIES
BY PERCENTAGE OF RENTAL UNITS OCCUPIED IN MAY 1959

Type of Facility	Percentage of Units Occupied Per Motel				
	Less than 20	20 to 49	50 to 79	80 and Over	All Motels
Number of Motels	14	23	46	17	100
	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>
Percentage of Motels With:					
Seasonal Rates	...	17.4	30.4	52.9	27.0
No Seasonal Rates	<u>100.0</u>	<u>82.6</u>	<u>69.6</u>	<u>47.1</u>	<u>73.0</u>
Total	100.0	100.0	100.0	100.0	100.0
Location on Lake	57.1	60.9	39.1	58.8	50.0
Location on Transcontinental Highway	28.6	13.0	23.9	29.4	23.0
Location on Interconnecting Highway	<u>14.3</u>	<u>26.1</u>	<u>37.0</u>	<u>11.8</u>	<u>27.0</u>
Total	100.0	100.0	100.0	100.0	100.0
Restaurant	28.6	17.4	10.9	29.4	16.0
No Restaurant	<u>71.4</u>	<u>82.6</u>	<u>89.1</u>	<u>70.6</u>	<u>84.0</u>
Total	100.0	100.0	100.0	100.0	100.0
Restaurant Within 0.1 Mile	28.6	26.1	60.9	41.2	45.0
Restaurant Within 0.2 to 0.9 Mile	...	21.7	23.9	23.5	20.0
Restaurant Within 1 Mile or Over	<u>71.4</u>	<u>52.2</u>	<u>15.2</u>	<u>35.3</u>	<u>35.0</u>
Total	100.0	100.0	100.0	100.0	100.0

APPENDIX TABLE 2--continued.

Childrens' Playground	28.6	65.2	37.0	52.9	45.0
No Childrens' Playground	<u>71.4</u>	<u>34.8</u>	<u>63.0</u>	<u>47.1</u>	<u>55.0</u>
Total	100.0	100.0	100.0	100.0	100.0
Babysitting Service	...	17.4	6.5	17.6	10.0
No Babysitting Service	<u>100.0</u>	<u>82.6</u>	<u>93.5</u>	<u>82.4</u>	<u>90.0</u>
Total	100.0	100.0	100.0	100.0	100.0
Beach Bathing Facilities	57.1	47.8	28.3	29.4	36.0
No Beach Bathing Facilities	<u>42.9</u>	<u>52.2</u>	<u>71.7</u>	<u>70.6</u>	<u>64.0</u>
Total	100.0	100.0	100.0	100.0	100.0
Guide Service	...	17.4	21.0	17.6	15.0
No Guide Service	<u>100.0</u>	<u>82.6</u>	<u>79.0</u>	<u>82.4</u>	<u>85.0</u>
Total	100.0	100.0	100.0	100.0	100.0
Plans For This Year:					
Add Facilities	28.6	13.0	19.6	23.5	20.0
No Change	<u>71.4</u>	<u>87.0</u>	<u>80.4</u>	<u>76.5</u>	<u>80.0</u>
Total	100.0	100.0	100.0	100.0	100.0

APPENDIX TABLE 3--PERCENTAGE OF MOTELS WITH SPECIFIED FACILITIES
BY PERCENTAGE OF RENTAL UNITS OCCUPIED IN JULY 1959

Type of Facility	Percentage of Units Occupied Per Motel			
	Less than 50	50 to 89	90 and Over	All Motels
Number of Motels	13	28	59	100
	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>
Percentage of Motels With:				
Seasonal Rates	7.7	10.7	39.0	27.0
No Seasonal Rates	<u>92.3</u>	<u>89.3</u>	<u>61.0</u>	<u>73.0</u>
Total	100.0	100.0	100.0	100.0
Location on Lakes	38.5	46.4	54.2	50.0
Location on Transcontinental Highway	23.0	10.7	28.8	23.0
Location on Interconnecting Highway	<u>38.5</u>	<u>42.9</u>	<u>17.0</u>	<u>27.0</u>
Total	100.0	100.0	100.0	100.0
Restaurant	23.1	14.3	18.0	16.0
No Restaurant	<u>76.9</u>	<u>85.7</u>	<u>82.0</u>	<u>84.0</u>
Total	100.0	100.0	100.0	100.0
Restaurant Within 0.1 Mile	15.4	32.1	57.6	45.0
Restaurant Within 0.2 to 0.9 Mile	23.1	39.3	10.2	20.0
Restaurant Within 1 Mile or Over	<u>61.5</u>	<u>28.6</u>	<u>32.2</u>	<u>35.0</u>
Total	100.0	100.0	100.0	100.0

APPENDIX TABLE 3--continued.

Swimming Pool	23.1	7.1	22.9	16.0
No Swimming Pool	<u>76.9</u>	<u>92.9</u>	<u>77.1</u>	<u>84.0</u>
Total	100.0	100.0	100.0	100.0
Childrens' Playground	38.5	42.8	47.5	45.0
No Childrens' Playground	<u>61.5</u>	<u>57.2</u>	<u>52.5</u>	<u>55.0</u>
Total	100.0	100.0	100.0	100.0
Babysitting Service	7.7	7.1	11.9	10.0
No Babysitting Service	<u>92.3</u>	<u>92.9</u>	<u>88.1</u>	<u>90.0</u>
Total	100.0	100.0	100.0	100.0
Boating Facilities	38.5	39.3	39.0	39.0
No Boating Facilities	<u>61.5</u>	<u>60.7</u>	<u>61.0</u>	<u>61.0</u>
Total	100.0	100.0	100.0	100.0
Beach Bathing Facilities	30.8	39.3	35.6	36.0
No Beach Bathing Facilities	<u>69.2</u>	<u>60.7</u>	<u>64.4</u>	<u>64.0</u>
Total	100.0	100.0	100.0	100.0
Guide Service		14.3	18.6	15.0
No Guide Service	<u>100.0</u>	<u>85.7</u>	<u>81.4</u>	<u>85.0</u>
Total	100.0	100.0	100.0	100.0
Plans For This Year:				
Add Facilities	15.4	17.9	22.0	20.0
No Change	<u>84.6</u>	<u>82.1</u>	<u>78.0</u>	<u>80.0</u>
Total	100.0	100.0	100.0	100.0

APPENDIX TABLE 4--PERCENTAGE OF MOTELS WITH SPECIFIED FACILITIES
BY PERCENTAGE OF RENTAL UNITS OCCUPIED IN OCTOBER 1959

Type of Facility	Percentage of Units Occupied Per Motel				
	Less than 20	20 to 49	50 to 79	80 and over	All Motels
Number of Motels	24	24	37	15	100
	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>
Percentage of Motels With:					
Seasonal Rates	16.7	8.3	35.1	53.3	27.0
No Seasonal Rates	<u>83.3</u>	<u>91.7</u>	<u>64.9</u>	<u>46.7</u>	<u>73.0</u>
Total	100.0	100.0	100.0	100.0	100.0
Location on Lake	70.8	50.0	37.8	46.7	50.0
Location on Transcontinental Highway	16.7	12.5	29.7	33.3	23.0
Location on Interconnecting Highway	<u>12.5</u>	<u>37.5</u>	<u>32.5</u>	<u>20.0</u>	<u>27.0</u>
Total	100.0	100.0	100.0	100.0	100.0
Restaurant	20.8	20.8	8.1	20.0	16.0
No Restaurant	<u>79.2</u>	<u>79.2</u>	<u>91.9</u>	<u>80.0</u>	<u>84.0</u>
Total	100.0	100.0	100.0	100.0	100.0
Restaurant Within 0.1 Mile	37.5	41.7	54.1	40.0	45.0
Restaurant Within 0.2 to 0.9 mile	12.5	16.6	27.0	20.0	20.0
Restaurant Within 1 Mile or Over	<u>50.0</u>	<u>41.7</u>	<u>18.9</u>	<u>40.0</u>	<u>35.0</u>
Total	100.0	100.0	100.0	100.0	100.0

APPENDIX TABLE 4 (CONTINUED)

Swimming Pool	16.7	8.3	10.8	40.0	16.0
No Swimming Pool	<u>83.3</u>	<u>91.7</u>	<u>89.2</u>	<u>60.0</u>	<u>84.0</u>
Total	100.0	100.0	100.0	100.0	100.0
Childrens' Playground	33.3	50.0	43.2	60.0	45.0
No Childrens' Playground	<u>66.7</u>	<u>50.0</u>	<u>56.8</u>	<u>40.0</u>	<u>55.0</u>
Total	100.0	100.0	100.0	100.0	100.0
Babysitting Service	12.5	12.5	8.1	6.7	10.0
No babysitting Service	<u>87.5</u>	<u>87.5</u>	<u>91.9</u>	<u>93.3</u>	<u>90.0</u>
Total	100.0	100.0	100.0	100.0	100.0
Plans for This Year:					
Add Facilities	29.2	16.7	18.9	13.3	20.0
No Change	<u>70.8</u>	<u>83.3</u>	<u>81.1</u>	<u>86.7</u>	<u>80.0</u>
Total	100.0	100.0	100.0	100.0	100.0