

2010-2011 DE TOURISM BY COUNTY



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Tourism Measures by Delaware County

| Tourism Metric | Kent County | New Castle County | Sussex County | DE Total |
|--|-------------|-------------------|---------------|-------------------|
| <i>2011 in millions of dollars except employment in # of full time equivalents</i> | | | | |
| Tourism Expenditures | \$ 553.2 | \$ 1,946.7 | \$ 1,518.9 | \$ 4,018.9 |
| Tourism GDP (Value-Added) | \$ 272.6 | \$ 958.7 | \$ 945.5 | \$ 2,176.7 |
| Core Tourism Employment | 5,413 | 19,049 | 14,863 | 39,324 |
| Core Tourism Wages | \$ 150.1 | \$ 577.8 | \$ 322.5 | \$ 1,050.4 |
| Tourism-Initiated Taxes | | | | |
| Federal | \$ 39.6 | \$ 194.3 | \$ 110.1 | \$ 344.0 |
| State & Local | \$ 68.0 | \$ 240.1 | \$ 183.3 | \$ 491.4 |

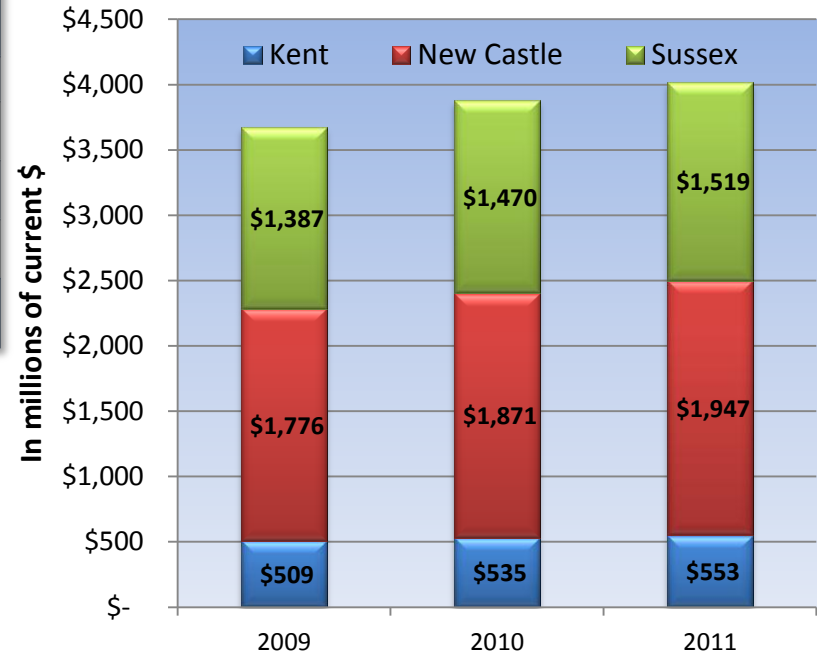
Source: Rockport Analytics

Growth Harder to Come by For DE Counties in 2011

| 2011 | Tourism Expenditures* | 11-v-'10 | Share of State |
|-----------------------|-----------------------|-------------|----------------|
| | (millions of \$) | % | % |
| Kent | \$ 553.2 | 3.3% | 14% |
| New Castle | \$ 1,946.7 | 4.0% | 48% |
| Sussex | \$ 1,518.9 | 3.3% | 38% |
| Delaware Total | \$ 4,018.9 | 3.6% | 100.0% |

*Excludes construction & investment spending

2011 Tourism Spending by DE County



Total Delaware
Gross State Product
for all industries
grew by 2.7% in
2011.

Shopping & F&B Lead 2011 Tourism Spending Growth

| 2011 | Accommodation | | Entertainment | Food & Beverage | Shopping | Transpo | Total |
|--------------|----------------|----------------|----------------|-----------------|------------------|----------------|------------------|
| | Hotel & Other | Rental Homes | | | | | |
| Kent | \$62.4 | \$16.3 | \$160.0 | \$106.3 | \$174.9 | \$33.3 | \$553.2 |
| New Castle | \$186.7 | \$18.0 | \$319.0 | \$485.8 | \$617.8 | \$319.4 | \$1,946.7 |
| Sussex | \$116.7 | \$890.1 | \$61.5 | \$200.5 | \$226.3 | \$23.8 | \$1,518.9 |
| Total | \$365.8 | \$924.5 | \$540.5 | \$792.5 | \$1,019.0 | \$376.4 | \$4,018.9 |
| | 2.3% | 2.4% | -0.3% | 5.9% | 5.8% | 3.7% | 3.7% |

Source: D.K. Shifflet & Associates, US Department of Commerce OTTI, BEA, BLS, Smith Travel Research, Bureau of Census, Rockport Analytics

- Transportation excludes trip spending that took place outside of DE
- New Castle county Transportation spending is boosted by train station and airport (ILG) activities
- Sussex County Accommodation includes the rental value of seasonal second homes
- Slower gaming activity reduced entertainment spending in Kent and New Castle counties

Core Tourism Jobs by Delaware County

| <i>(in thousands of full-time equivalent jobs)</i> | 2009 % of Total County | | 2010 % of Total County | | | 2011 % of Total County | | |
|--|---------------------------|-------------|---------------------------|-------------|----------------------|---------------------------|-------------|----------------------|
| | 2009 | Employment | 2010 | Employment | Yr-to-Yr % Change | 2011 | Employment | Yr-to-Yr % Change |
| Kent County | 5,194 | 6.1% | 5,328 | 6.3% | -0.3% | 5,413 | 6.3% | 1.6% |
| Newcastle County | 18,121 | 5.2% | 18,626 | 5.4% | 2.8% | 19,049 | 5.5% | 2.3% |
| Sussex County | 14,147 | 16.7% | 14,636 | 17.4% | 3.5% | 14,863 | 15.2% | 1.6% |
| Total DE Tourism | 37,462 | 7.1% | 38,590 | 7.3% | 3.0% | 39,324 | 7.4% | 1.9% |

Source: BEA, BLS, Rockport Analytics

- Core Tourism refers to private sector jobs with firms that directly touch Delaware visitors
- Full-time equivalency (FTEs) refers to the number of jobs required to support measured levels of tourism expenditures. Full and part-time jobs are converted to FTEs based upon a 40 hr workweek
- Total Delaware employment reached just short of 417,300 in 2011, a 0.8% gain from the previous year. Tourism employment more than doubled that rate of growth.

Tourism is #1 Employer in Sussex County

| | | A | B | C |
|----|-------------------------------|-----------------------------------|--------------------------|---------------------------------|
| R | Sussex Industry | 2011 Tourism-Initiated Employment | 2011 Reported Employment | 2011 Employment Tourism-Removed |
| 1 | Tourism | 14,863 | n/a | 14,863 |
| 2 | Retail trade | 1,517 | 14,155 | 12,638 |
| 3 | Health & social services | - | 10,862 | 10,862 |
| 4 | Manufacturing | - | 10,824 | 10,824 |
| 5 | Government | - | 8,373 | 8,373 |
| 6 | Construction | - | 6,858 | 6,858 |
| 7 | Other services | - | 6,165 | 6,165 |
| 8 | Accommodation & food services | 5,535 | 9,938 | 4,403 |
| 9 | Administrative & waste servi | 452 | 4,722 | 4,270 |
| 10 | Finance & insurance | - | 3,705 | 3,705 |
| 11 | Professional- scientific & t | - | 3,447 | 3,447 |
| 12 | Real estate & rental | 5,879 | 7,293 | 1,414 |
| 13 | Transportation & Warehousing | 230 | 2,046 | 1,816 |
| 14 | Wholesale Trade | - | 1,348 | 1,348 |
| 15 | Arts- entertainment & recrea | 1,245 | 1,894 | 650 |
| 16 | Information | 4 | 718 | 713 |
| | Other Sectors | - | 1,620 | 1,620 |
| | Total Sussex County | 14,863 | 93,967 | 93,967 |

- A. Core Tourism is an activity that touches many industries
- B. This is reported employment from the BLS & DE-DOL (2011 estimated)
- C. For a more accurate comparison, we have removed tourism's contribution to the other industries

Tourism -4th Largest Employer in Kent County

| | | A | B | C |
|----------|-------------------------------|-----------------------------------|--------------------------|---------------------------------|
| R | Kent Industry | 2011 Tourism-Initiated Employment | 2011 Reported Employment | 2011 Employment Tourism-Removed |
| 1 | Government | - | 23,472 | 23,472 |
| 2 | Retail trade | 858 | 10,739 | 9,881 |
| 3 | Health & social services | - | 9,255 | 9,255 |
| 4 | Tourism | 5,413 | n/a | 5,413 |
| 5 | Other services | - | 5,310 | 5,310 |
| 6 | Construction | - | 4,117 | 4,117 |
| 7 | Administrative & waste servi | 240 | 4,044 | 3,803 |
| 8 | Accommodation & food services | 2,241 | 5,661 | 3,419 |
| 9 | Finance & insurance | - | 3,161 | 3,161 |
| 10 | Manufacturing | - | 2,896 | 2,896 |
| 11 | Real estate & rental | 115 | 2,742 | 2,627 |
| 12 | Transportation & Warehousing | 156 | 2,781 | 2,625 |
| 13 | Professional- scientific & t | - | 2,486 | 2,486 |
| 14 | Arts- entertainment & recrea | 1,795 | 3,743 | 1,949 |
| 15 | Ag, Forestry, Fish & Hunting | - | 1,886 | 1,886 |
| 16 | Wholesale Trade | - | 1,754 | 1,754 |
| | Other Sectors | 8 | 3,299 | 3,291 |
| | Total Kent County | 5,413 | 87,344 | 87,344 |

A. Core Tourism is an activity that touches many industries

B. This is reported employment from the BLS & DE-DOL (2011 estimated)

C. For a ore accurate comparison, we have removed tourism's contribution to the other industries

Tourism -6th Largest Employer in New Castle County

| R | New Castle Industry | A 2011 Tourism- Initiated Employment | B 2011 Reported Employment | C 2011 Employment Tourism- Removed |
|----------|--------------------------------|---|----------------------------------|--|
| 1 | Finance & insurance | - | 45,508 | 45,508 |
| 2 | Health & social services | - | 44,620 | 44,620 |
| 3 | Government & non NAICs | - | 39,123 | 39,123 |
| 4 | Retail trade | 3,340 | 35,288 | 31,948 |
| 5 | Professional- scientific & t | - | 28,665 | 28,665 |
| 6 | Tourism | 19,049 | n/a | 19,049 |
| 7 | Administrative & waste servi | 747 | 19,491 | 18,744 |
| 8 | Other services | - | 18,275 | 18,275 |
| 9 | Construction | - | 17,075 | 17,075 |
| 10 | Real estate & rental | 518 | 14,771 | 14,254 |
| 11 | Manufacturing | - | 14,155 | 14,155 |
| 12 | Accomodation & food services | 9,341 | 21,223 | 11,881 |
| 13 | Wholesale Trade | - | 10,659 | 10,659 |
| 14 | Management of companies | - | 10,302 | 10,302 |
| 15 | Educational svcs | - | 8,183 | 8,183 |
| 16 | Transportation & Warehous | 1,504 | 8,007 | 6,503 |
| | Other Sectors | 3,599 | 15,834 | 12,236 |
| | | | | |
| | Total New Castle County | 19,049 | 351,178 | 351,178 |

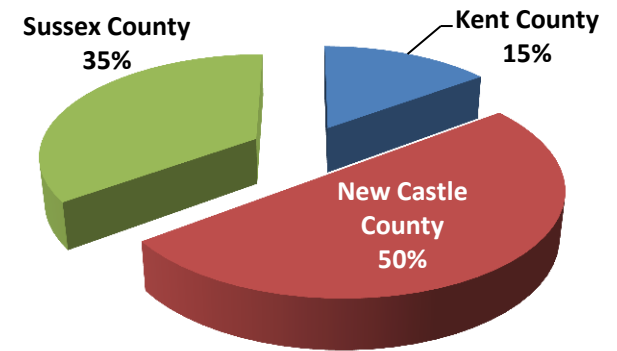
- A. Core Tourism is an activity that touches many industries**
- B. This is reported employment from the BLS & DE-DOL (2011 estimated)**
- C. For a more accurate comparison, we have removed tourism's contribution to the other industries**

Tourism-Initiated Tax Collections by County in Delaware

| | Kent County | New Castle County | Sussex County | Delaware Total |
|---|------------------------|----------------------|------------------|-------------------|
| Tax / Fee Type | 2011 Total (million\$) | | | |
| Federal Government | \$34.9 | \$170.4 | \$97.6 | \$302.9 |
| Corporate Taxes | \$11.0 | \$41.0 | \$37.2 | \$89.2 |
| Personal Income Tax | \$6.9 | \$46.8 | \$17.3 | \$71.0 |
| Social Insurance Tax | \$17.1 | \$82.5 | \$43.1 | \$142.7 |
| State/Local Government | \$64.9 | \$218.4 | \$153.3 | \$436.6 |
| Corporate Profits Tax | \$1.8 | \$7.1 | \$8.8 | \$17.8 |
| Dividends | \$1.7 | \$6.6 | \$8.2 | \$16.5 |
| Personal Income | \$2.9 | \$17.3 | \$7.1 | \$27.3 |
| Sales Taxes | \$5.8 | \$21.0 | \$20.2 | \$47.0 |
| Other Business Taxes, Licenses & Fees | \$1.3 | \$33.5 | \$62.9 | \$97.8 |
| Public Accommodation Tax | \$2.3 | \$10.2 | \$5.8 | \$18.4 |
| Property Taxes | \$8.4 | \$30.4 | \$29.2 | \$68.0 |
| Other Personal Licenses, Fines, & Fees | \$0.6 | \$3.2 | \$1.4 | \$5.2 |
| Social Insurance Tax | \$0.3 | \$0.5 | \$0.3 | \$1.0 |
| Video Lottery & Gaming | \$24.2 | \$48.2 | \$9.3 | \$81.7 |
| Tolls | \$15.7 | \$40.4 | \$0.0 | \$56.1 |
| Grand Total | \$99.8 | \$388.8 | \$250.9 | \$739.5 |



2011 Tourism-Initiated Taxes
State/Local Levies

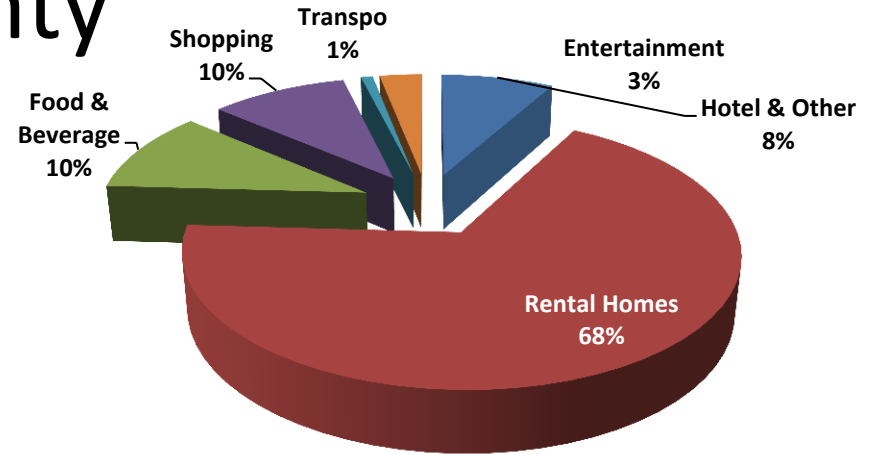


Sussex Tourism Spending: Shore vs. Rest of County

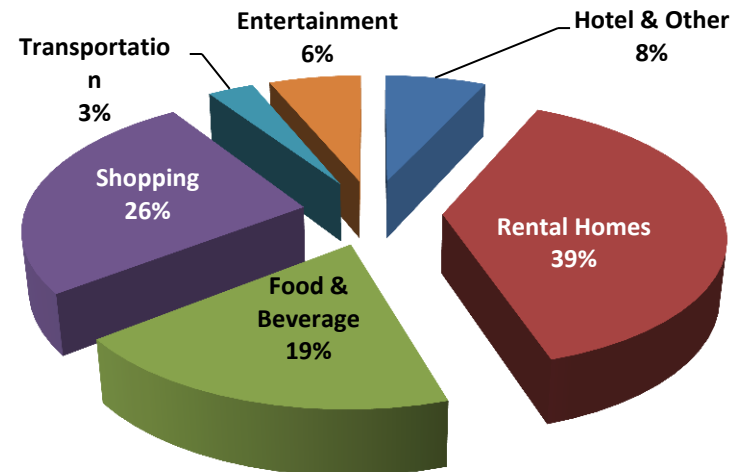
| Tourism Expenditures by Category | Sussex Shore Region | Other Sussex | Sussex County Total |
|------------------------------------|---------------------|----------------|---------------------|
| <i>2011 in millions of dollars</i> | | | |
| Accommodations | | | |
| Hotel & Other | \$84.0 | \$32.7 | \$116.7 |
| Rental Homes | \$708.1 | \$182.0 | \$890.1 |
| Food & Beverage | \$108.9 | \$91.6 | \$200.5 |
| Shopping | \$102.0 | \$124.3 | \$226.3 |
| Transportation | \$8.8 | \$15.0 | \$23.8 |
| Entertainment | \$31.8 | \$29.8 | \$61.5 |
| | | | |
| Total Expenditures | \$1,043.6 | \$475.4 | \$1,518.9 |

Source: Rockport Analytics

Sussex Shore Region



Other Sussex County



Sussex County Tourism Dominated by Shore Destinations

| Tourism Metric | Sussex Shore | Other Sussex | Sussex County Total |
|---|--------------|--------------|---------------------|
| 2011 in millions of dollars except employment in # of full time equivalents | | | |
| Tourism Expenditures | \$ 1,043.6 | \$ 475.4 | \$ 1,518.9 |
| Tourism GDP (Value-Added) | \$ 649.6 | \$ 295.9 | \$ 945.5 |
| Core Tourism Employment | 7,930 | 6,933 | 14,863 |
| Core Tourism Wages | \$ 172.1 | \$ 150.4 | \$ 322.5 |
| Tourism-Initiated Taxes | | | |
| Federal | \$ 75.6 | \$ 34.5 | \$ 110.1 |
| State & Local | \$ 125.9 | \$ 57.4 | \$ 183.3 |

Sussex Shore Region comprises nearly 70% of the county's tourism economic impact



Source: Rockport Analytics

- Estimated by examining business locations and employment for tourism suppliers from County Business Patterns and Dun & Bradstreet
- Rental home revenue was analyzed using specific locations from the 2010 U.S. Census