



*Delaware*  
Tourism

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# Value of Tourism in Delaware 2010

Delaware Tourism Office



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## **Tourism's Total Contribution to Delaware's Gross Domestic Product (GDP)**

- GDP = Total market value of goods and services produced by the State's economy during fiscal year 2010
- \$2.1 billion



## Value of Tourism

- 7.1 million visitors in 2010
- 39,000 employees
- 3rd largest private employer in the state



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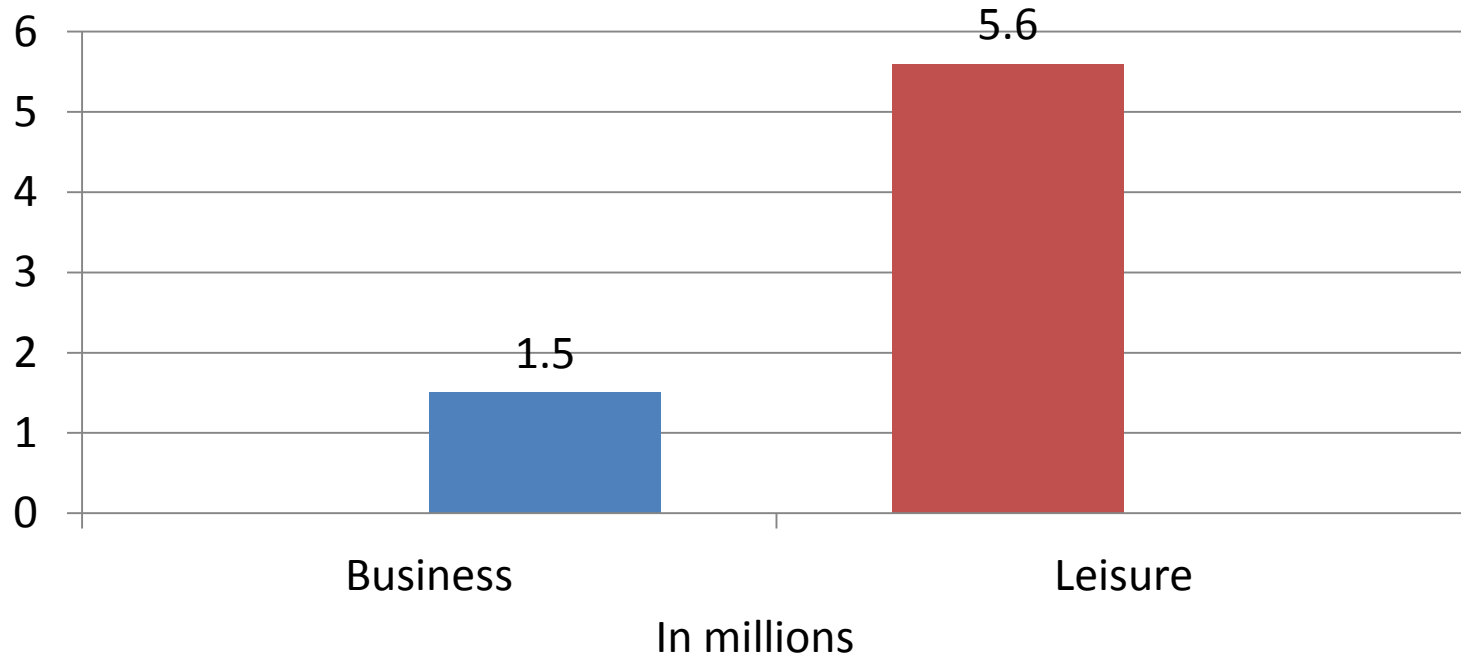
## Value of Tourism

- Tourism generated \$400 million in state and local government taxes/fees in 2010.
- Without Tourism in DE, each DE household would pay \$114 more in taxes to maintain current levels of state and local taxes.



# Business & Leisure Travel

## 2010

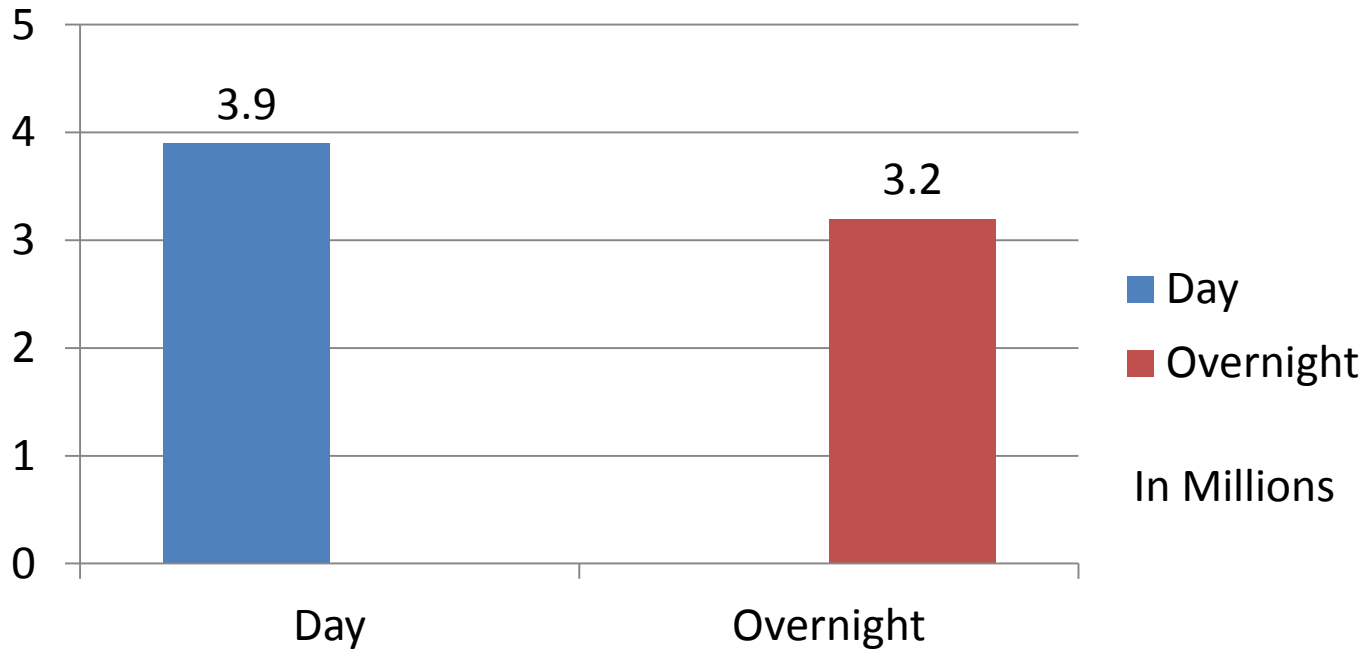






# Day Trips vs. Overnight Stays

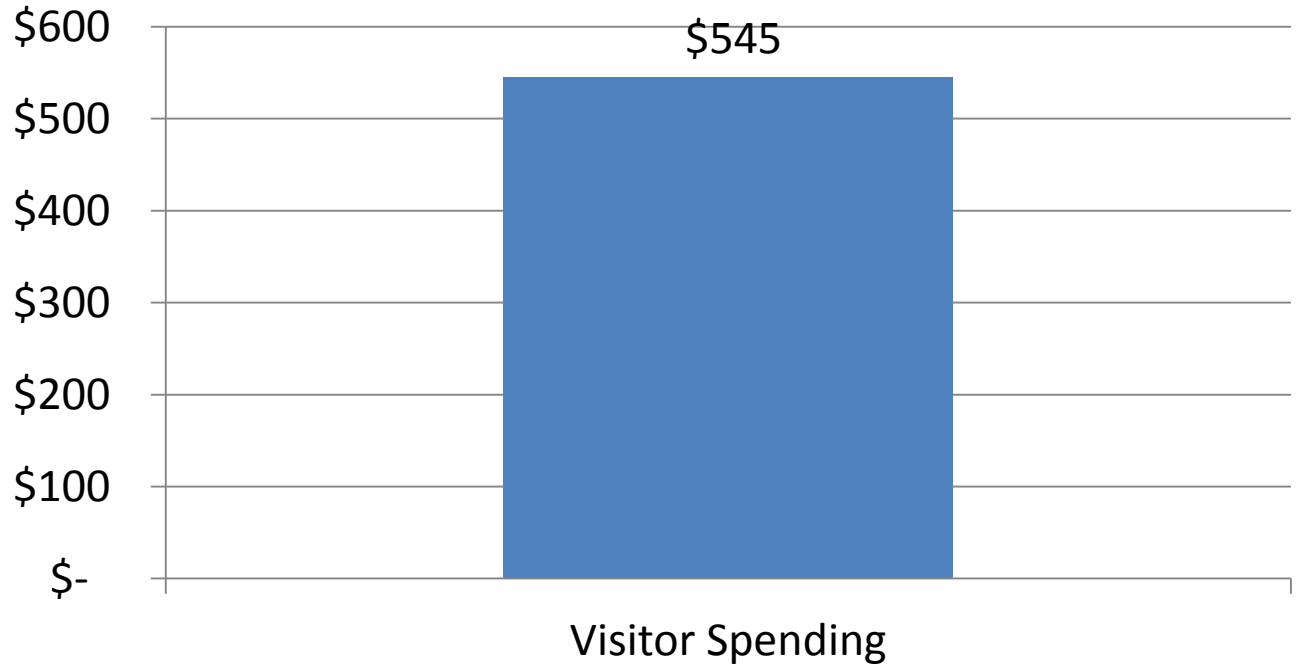
2010





# Average Visitor Spending Per Trip

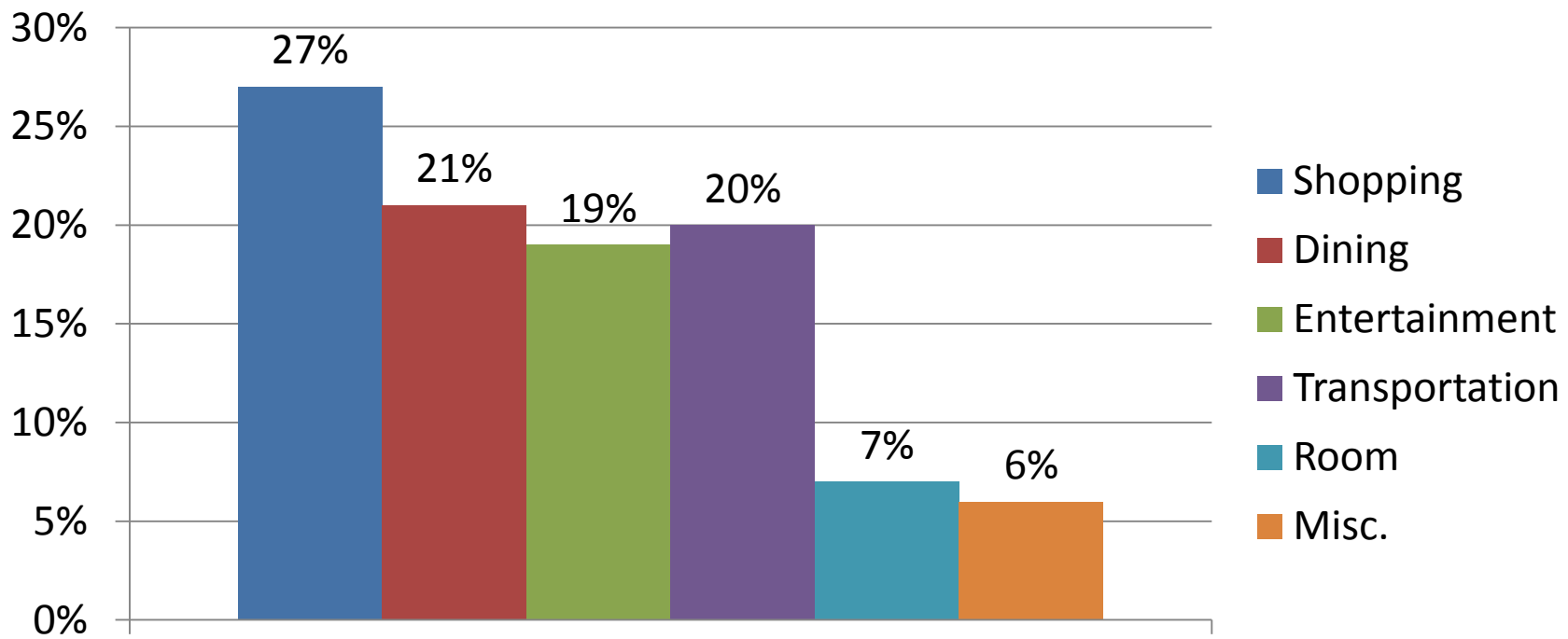
2010





# Category Spending Per Person

## 2010



Categories

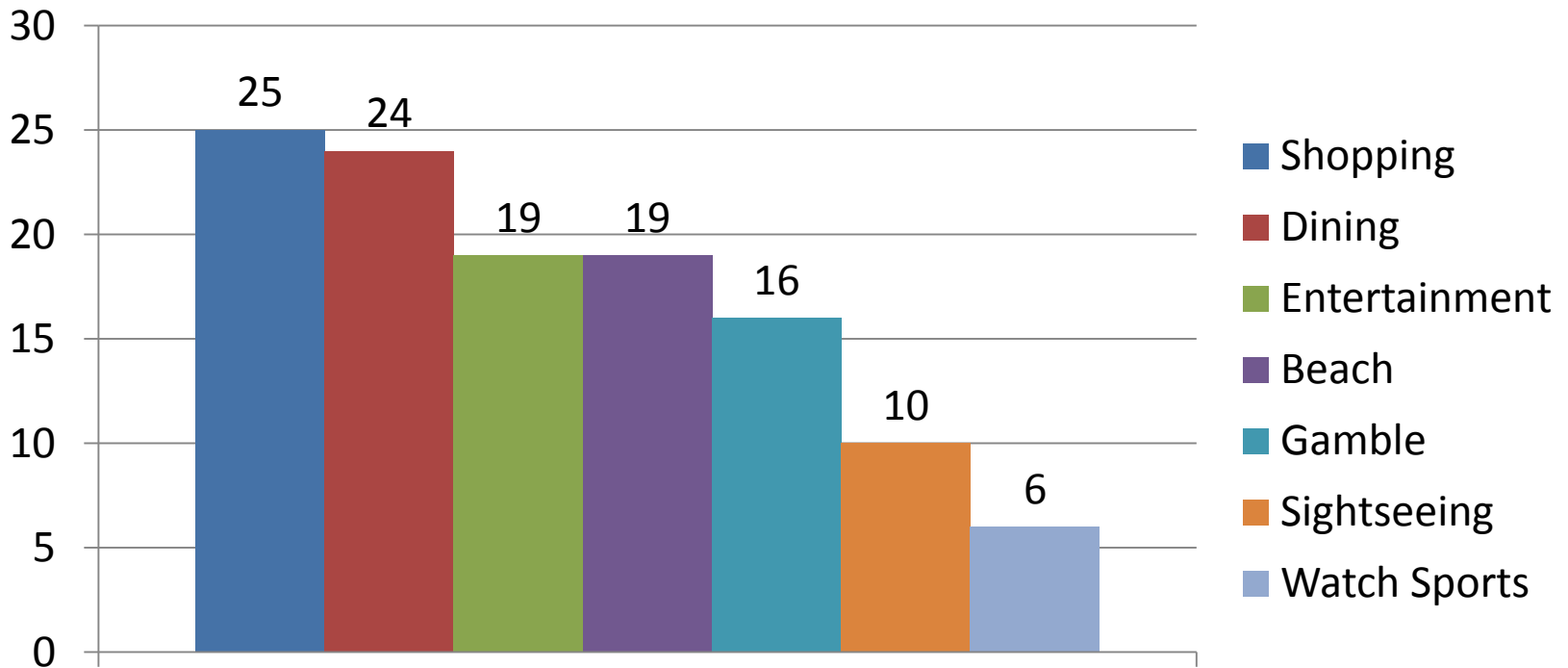
**Average per person daily spend=\$ 105.00**





# Visitor Activities

2010

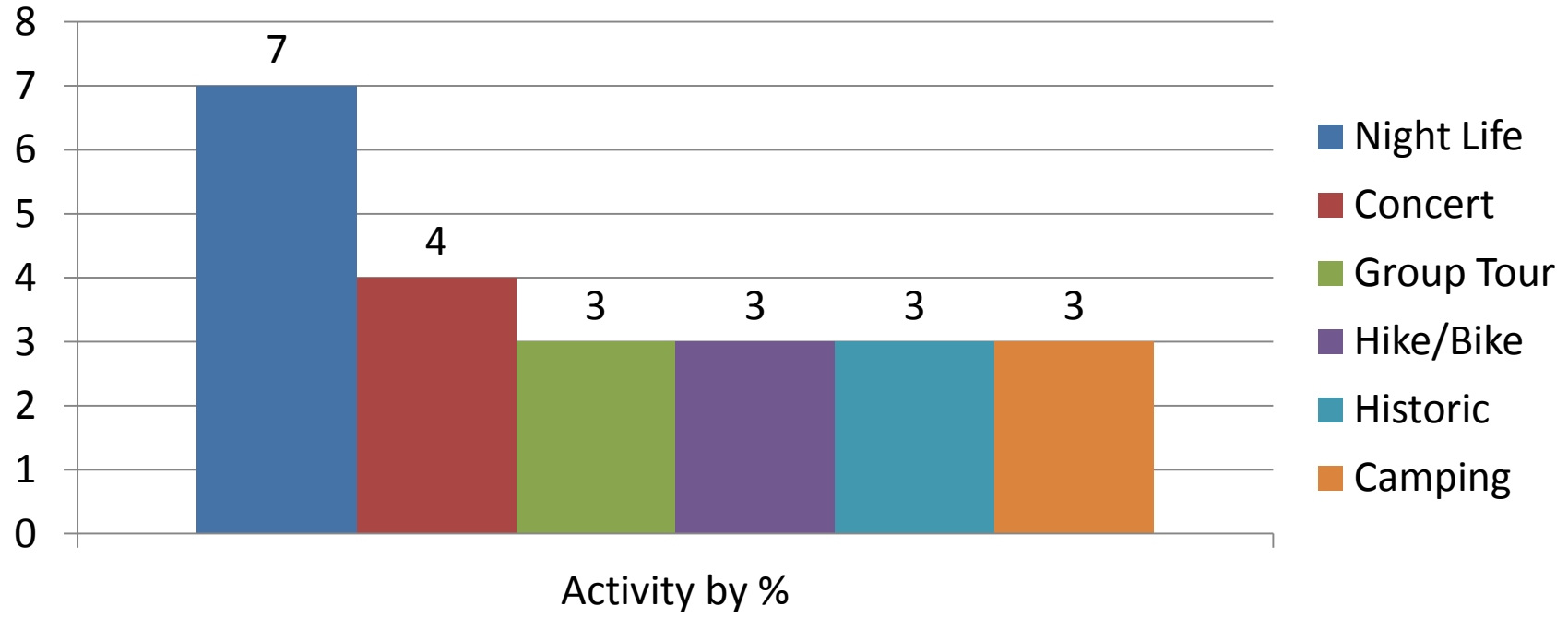


Activity by %



# Other Activities

## 2010





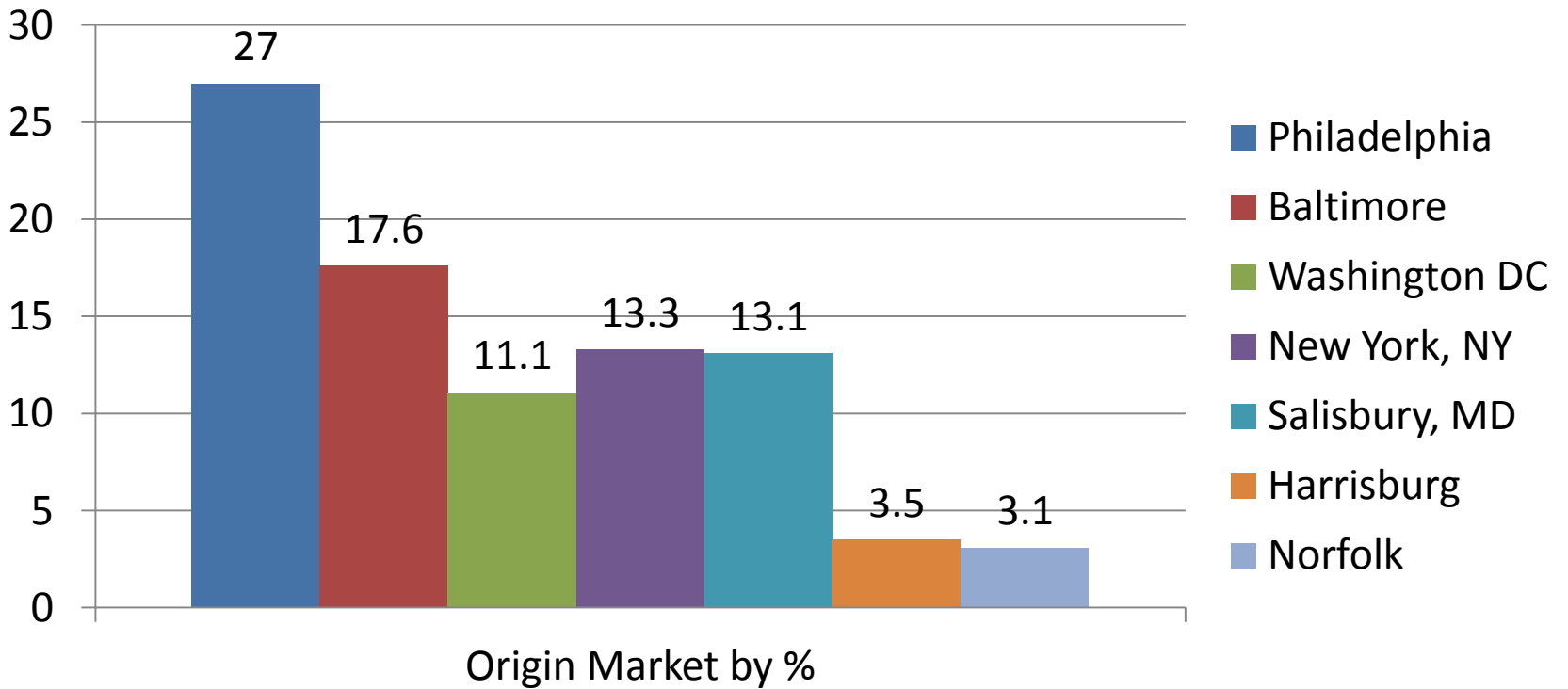
# Visitor Demographics

Delaware Visitor Demographics 2010		
Category	Travelers to Delaware	Travelers Domestically
Age	47	45
Household Income	\$94,322.	\$82,141
Average Party Size	2.21	2.43
Average trip length (nights)	1.72	1.70
Average Daily Spending (per person)	\$105	\$105



# Top Markets of Origin

## 2010







# Top Origin States

## Top Origin States to Delaware



TRIP ORIGIN

### LEGEND

- 24.4% Delaware
- 23.6% Maryland
- 18.0% Pennsylvania
- 11.1% New Jersey
- 6.1% Virginia
- 5.4% New York
- 2.7% Dist. of Columbia
- 1.5% North Carolina
- 1.2% Florida
- 1.0% Massachusetts

Chart 20 • Segment: 2008-2010 Leisure Trips (%) • Delaware N = 1,122 household count





## WHAT DO VISITORS MEAN TO DE?

- ✓ Each DE visitor spends about \$545 at businesses around the state.
- ✓ Each visitor contributes about \$385 to the Delaware economy, \$75 of which goes to businesses that do not directly “touch” that visitor.
- ✓ 69¢ of each dollar spent by visitors is kept within DE.
- ✓ It would take only 156 visitors to support a new DE job.





## WHAT DO VISITORS MEAN TO DE?

- ✓ About \$98 per visitor in tax receipts, \$56 of which goes to state & local authorities.
- ✓ Every 258 visitors pays for a Delaware public school student<sup>1</sup> for the year.
- ✓ Each visitor pays \$185 in wages to workers employed across an array of Delaware industries.



## SEASONAL HOMES

County	# of Seasonal 2 <sup>nd</sup> Homes- 2010	# of Seasonal 2 <sup>nd</sup> Homes- 2000	% Growth 2000-2010	2010 Rental Value (in mils\$)	% of State	2010 vs 2009 %
Kent	457	364	25.5%	\$16.0	1.8%	5.8%
Newcastle	712	707	0.7%	\$17.8	2.0%	3.2%
Sussex	34,770	24,906	39.6%	\$869.3	96.3%	7.0%
<b>Total</b>	<b>35,939</b>	<b>25,977</b>	<b>38.3%</b>	<b>\$903.0</b>	<b>100%</b>	<b>6.9%</b>



Seasonal homes increased 40% from 2000-2010 and account for over 28.3% of all housing units in Sussex County

Had seasonal home rental spending been subject to DE's Public Accommodation Tax, an additional \$72m in state revenue would have been generated in one year.



# 2010 County Spending

2010	Tourism Expenditures*	'10-vs-'09	Share of State
	(millions of \$)	%	%
<b>Kent</b>	\$ 535.3	5.2%	14%
<b>New Castle</b>	\$ 1,871.4	5.4%	48%
<b>Sussex</b>	\$ 1,470.4	6.0%	38%
<b>Total</b>	\$ 3,877.1	5.6%	100%

\*Excludes construction & investment spending

**Delaware's 2010 Gross State Product grew at roughly half the rate of DE Tourism.**

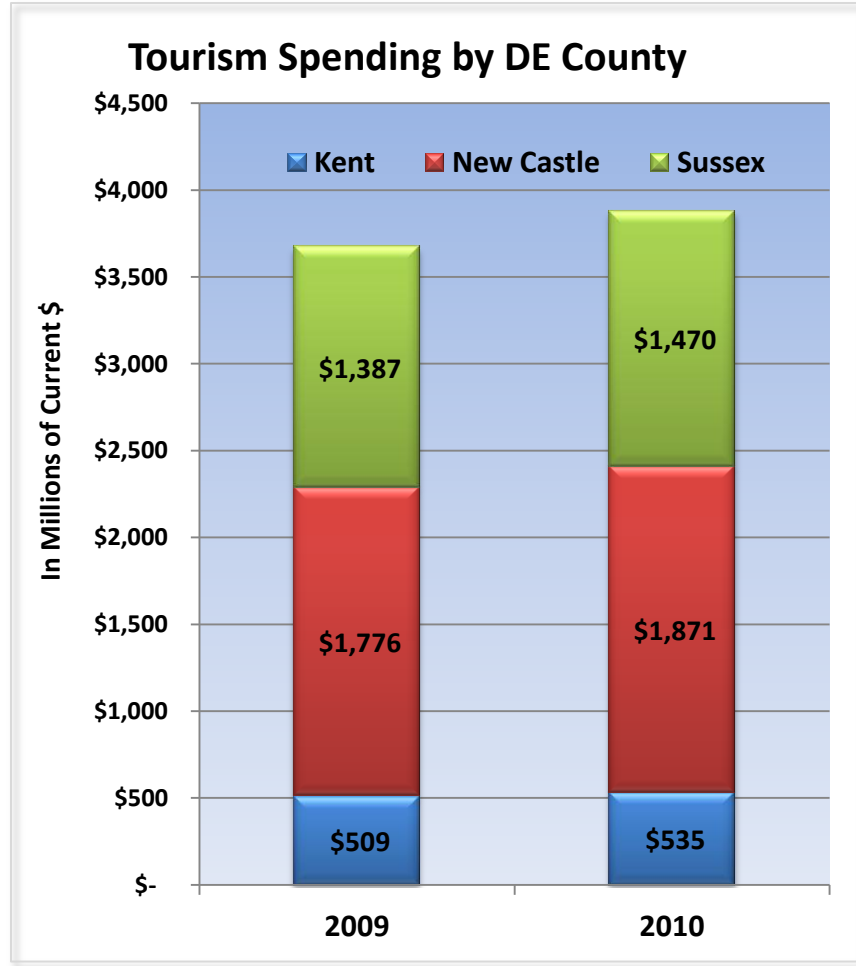




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# 2010 County Spending



Source: D.K. Shifflet & Associates, US Department of Commerce OTTI, BEA, BLS, Smith Travel Research, Vantage Strategy





# 2010 County Spending Breakdown

2010 in Millions \$	Accommodation		Entertainment	Food & Beverage	Shopping	Trans.	Total
	Hotel & Other	Rental Homes					
<b>Kent</b>	\$61.0	\$16.2	\$160.5	\$100.4	\$165.3	\$32.1	\$535.3
<b>New Castle</b>	\$182.5	\$18.4	\$319.9	\$458.8	\$583.8	\$308.0	\$1,871.4
<b>Sussex</b>	\$114.1	\$868.5	\$61.7	\$189.4	\$213.8	\$22.9	\$1,470.4
<b>Total</b>	<b>\$357.6</b>	<b>\$903.0</b>	<b>\$542.0</b>	<b>\$748.6</b>	<b>\$962.9</b>	<b>\$363.0</b>	<b>\$3,877.1</b>
<b>vs 2009 %</b>	3.0%	6.9%	4.5%	3.1%	7.4%	7.3%	5.6%

Source: D.K. Shifflet & Associates, US Department of Commerce OTTI, BEA, BLS, Smith Travel Research, Vantage Strategy

- Transportation excludes trip spending that took place outside of DE.
- New Castle County Transportation spending is boosted by airport (ILG) and train station activities.
- Sussex County Accommodation includes the rental value of seasonal second homes and an imputed measure for owner utilization.



# Core Tourism Jobs by County

<i>(in thousands of full-time equivalent jobs)</i>	2009 % of Total County Employment		2010 % of Total County Employment		Yr-to-Yr % Change
	2009	2010	2009	2010	
Kent County	5,194	6.1%	5,328	6.3%	-0.3%
Newcastle County	18,121	5.2%	18,626	5.4%	2.8%
Sussex County	14,147	16.7%	14,636	17.4%	3.5%
<b>Total DE Tourism</b>	<b>37,462</b>	<b>7.1%</b>	<b>38,590</b>	<b>7.3%</b>	<b>3.0%</b>

Source: D.K. Shifflet & Associates, US Department of Commerce OTTI, BEA, BLS, Vantage Strategy

- 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.
- Total Delaware employment reached just short of 400,000 in 2010, a -0.7% decline from the previous year.



## DE Tourism Taxes: State & Local by Source

DE S&L Tourism tax revenue grew at nearly twice the rate of overall state tax receipts in 2010.

Tax Revenues from Tourism	2009 (Millions)	2010 (Millions)	'10/'09 %
<b>State and Local</b>			
Corporate Profits Tax	\$16.9	\$17.5	3.8%
Dividends	\$15.7	\$16.3	3.8%
Personal Income	\$26.5	\$26.9	1.5%
Sales Taxes	\$44.7	\$46.4	3.7%
Other Business Taxes, Licenses & Fees	\$85.1	\$90.4	6.3%
Public Accommodation Tax	\$16.8	\$17.7	5.3%
Property Taxes	\$64.8	\$67.1	3.7%
Other Personal Licenses, Fines, & Fees	\$5.0	\$5.1	1.5%
Social Insurance Tax	\$1.0	\$1.0	1.6%
Video Lottery & Gaming	\$86.8	\$87.5	0.8%
Tolls	\$15.0	\$20.7	38.1%
<b>State and Local Total</b>	<b>\$378.3</b>	<b>\$396.7</b>	<b>4.9%</b>



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Sources: D.K.Shifflet & Vantage Strategy