

The 2016-2017 Economic Impact of the Delaware State Park System Full Report



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Delaware State Parks



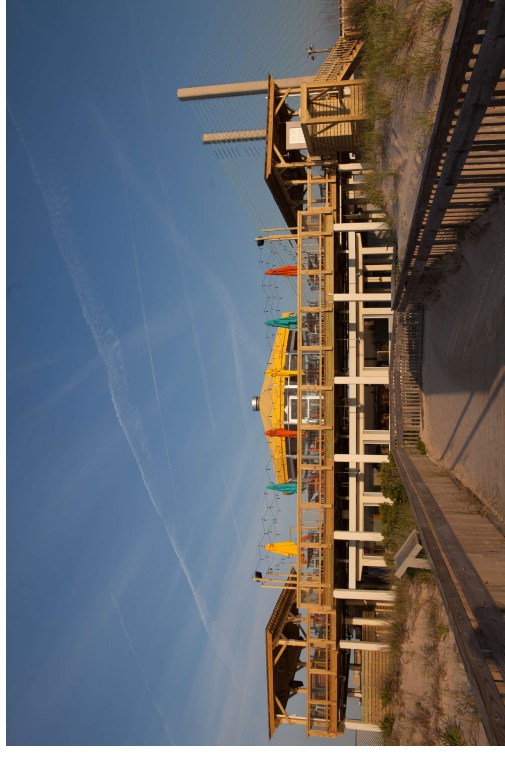
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Study Overview

The 2016/2017 economic impact of Delaware State Parks was commissioned by Delaware Division of Parks and Recreation. This report covers both the Division's 2016 & 2017 fiscal years and the analysis seeks to translate the contribution made by main purpose park visitors to Delaware's GDP, jobs, wages, and tax receipts. The research was conducted by Rockport Analytics, an independent market research & consulting company, using a time-tested approach that has been applied to many events, attractions and destinations across the United States. The goal of the study was to measure and analyze the full economic contribution that park visitors make to the Delaware economy. The Delaware Division of Parks and Recreation would also like to extend special thanks to the Delaware Office of Tourism Development for their support and partnership in conducting this study.

The foundation of this report is based on both electronic and in-person survey data collected by Rockport Analytics and Delaware State Parks. The findings in this study are based on data collected from two surveys of park visitors: one fielded online and one fielded via in-person intercept surveys. Visitation metrics may differ from those reported by the due to methodological and definitional differences. In this study we are interested in Main Purpose Visitors (defined on subsequent pages). We are also interested not only in the time these visitors spent in the park but in the total time spent in the area surrounding the park as well.





Economic Impact Studies (EIS) seek to estimate the incremental benefits to the state and local economies of an attraction, event, public investment, or change in policy. The resulting net increase/decrease in jobs, wages, taxes and GDP can help to determine the optimal level of public investment in an activity.

- The key is the level of **net incremental spending** directly attributable to the DSP system.
- *Direct and ancillary Delaware resident spending surrounding the DSP must not be included* - the assumption is that those monies would be spent elsewhere in the Delaware economy if the DSP did not exist.
- **Delaware residents do benefit from the DSP**. The benefits are about subjective choices among education/attraction alternatives rather than the creation of net new economic activity.
- **Main Purpose Visitor** - direct and ancillary spending by visitors to/within Delaware whose primary purpose is to visit a Delaware State Park is clearly net new and attributable to the DSP.
- **DSP's operational spending is net new and attributable as defined by labor and material purchases** that are direct injections into the state and local economies of Delaware.
- **DSP's capital spending is, likewise, a direct injection**, one with potentially longer-lasting benefits. This type of spending typically involves construction (one-time benefits) and expansion/improvements to DSP's facilities and offerings (continuing benefits).



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Delaware State Parks Economic Impact Headlines

In October of 2016, Rockport Analytics was retained by Delaware State Parks to conservatively measure the economic contribution made by the DSP System to the state of Delaware and its local communities. The following report summarizes our findings.

- In FY2016/2017, there were an estimated 4.1 million visits to Delaware's 16 state parks. Of that total, 1.6 million could truly be classified as *primary visitors* – those who traveled **at least 50 miles** and named a state park as *the primary reason* for their visit.
- Park Visitors surveyed skewed towards middle-aged, with 66% between the ages of 35 – 64; only 2% of visitors were under the age of 25 and only 1% were over the age of 75. Delaware State Park visitors are well distributed across both age and income cohorts. Just over half of all visitors have a bachelor's, master's, professional or doctoral degree. 43% of park visitors had household incomes below \$75k, another 43% have incomes between \$75k and \$150k and the remaining households have incomes greater than \$150k .
- Length of stay for visitors to Delaware State Parks was varied: 19% of visits were day trips, 29% were one to three night stays, 22% were four to five night stays and 18% stayed for six nights or more. Public (Parks) RV parks was the most common type of lodging accommodations among park visitors in, utilized by 45% of visitors. This is followed by parks tent camping (27%) and parks cabins, cottages and yurts (11%). The biggest driver for visiting Delaware State Parks was the land offerings, including beaches, woodlands and ponds. The second biggest driver of park visitation was the visitor's proximity to the park.





Delaware State Parks Economic Impact Headlines

- Park visitors spent nearly \$398 million on various goods and services in the state in FY2016, or an average of \$245 per visitor. Add in the operations spending of the system and capital expenditures and total incremental expenditures initiated by the Delaware State Parks reached nearly \$407 million.
- Not all of that spending stays in Delaware of course. Of that amount, we estimate that about \$376 million remained in Delaware to contribute to the state's economy.
- Including DSP employees, the system supported nearly 6,700 full and part-time jobs across Delaware. These workers were paid over \$227 million in wages in FY2016. This amounts to an average annual wage of nearly \$34,000.
- The DSP system also made a significant contribution to state and local taxes. For FY2016, nearly \$53 million in state and local taxes were initiated by the DSP system, including \$6.6 million in gross receipts tax, \$1.5 million in hotel taxes, \$4.7 million in income taxes, and \$9.5 million in property taxes. DSP-initiated state & local taxes were sufficient to underwrite the annual cost of roughly 3,300 Delaware public school students.
- The state parks with campgrounds made an outsized contribution to the economic impact to the state – contributing 82% of the total system-wide impact. Visitor spending in the five camping parks – Cape Henlopen, Killens Pond, Lums Pond, Delaware Seashore and Trap Pond totaled \$318.9 million in FY2016.



Delaware State Park System

FY 2016/2017 Visitor Demographics, Visitation & Spending



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Delaware State Park Attendance Progression			
	All DSP	Camping Parks ¹	Day Use Parks ²
Total Attendance	4.1 million	3.0 million	1.1 million
All Visitors*	2.3 million	2.0 million	284,000
Main Purpose Visitors**	1.6 million	1.4 million	194,000
Residents	1.8 million	1 million	861,000

• A visitor is an attendee who has either stayed overnight or traveled at least 50 miles one-way to visit a Delaware State Park
 • ** A *Main Purpose Visitor* is a visitor who has identified a Delaware State Park site as the principal reason for their visit to the respective destination
 Source: Delaware Division of Parks and Recreation, DK Shifflet, UNWTO, Rockport Analytics

- Over 4 million visits were made to a Delaware State Park in fiscal year 2016, including 3 million visits to Delaware camping parks and 1.1 million visits to state day use parks.
- Over half of that attendance was non-local and about 39% were visitors whose main trip purpose was to visit a Delaware state park. Both bring critical visitor commerce into Delaware and the local economies around the state park.
- Main Purpose Visitors are those whose primary trip purpose was a state park. This visitation can be directly attributed to the DSP system and would not have taken place in their absence.
- Residents also enjoy the DSP assets around the state. Rockport estimates that approximately 1.8 million resident visits were made during FY2016.

²Bellevue State Park, Brandywine Creek State Park, Fenwick Island State Park, Fort Dupont State Park, Alapocas Run State Park, White Clay Creek State Park, Holts Landing State Park, Fort Delaware State Park, Brandywine Zoo, Auburn Heights Preserve, First State Heritage Park at Dover

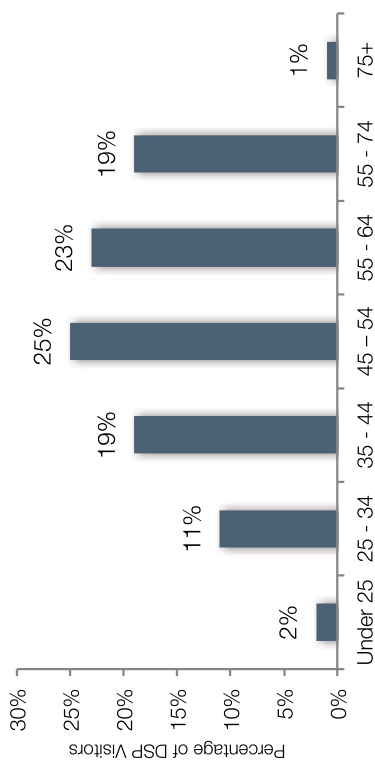
¹Cape Henlopen, Delaware Seashore, Killens Pond, Lums Pond, Trap Pond



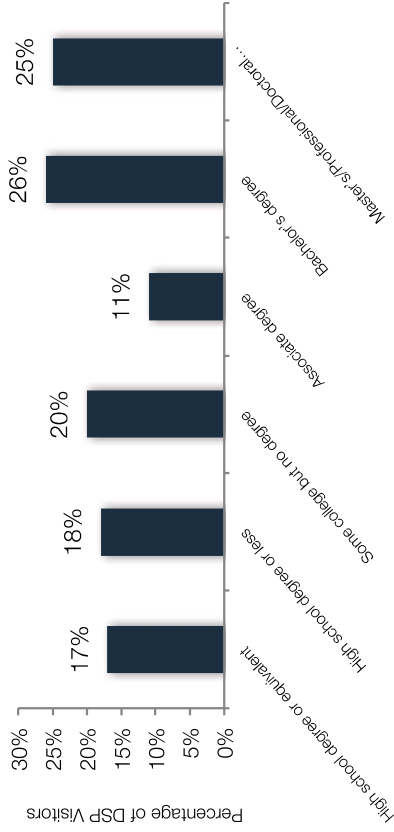


- Roughly two out of every three visitors to a Delaware State Park were between the ages of 35 – 64. Only 2% of survey participants were under the age of 25 and only 1% were over the age of 75.
- Delaware State Park visitors are well distributed across both age and income cohorts:
 - Just over half of all visitors have a Bachelor’s, Master’s, Professional or Doctoral Degree.
 - 43% of park visitors have household incomes below \$75k, another 43% have incomes between \$75k and \$149k, and the remaining households have incomes greater than \$150k.

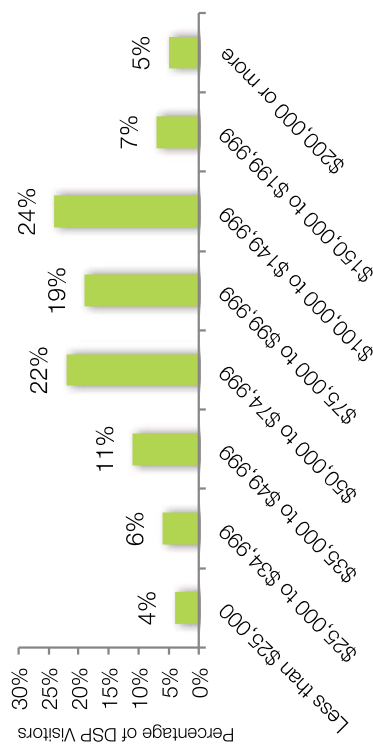
Age of Survey Participants



Educational Attainment of DSP Visitors



Household Income of DSP Visitors



Source: Online survey of park visitors, December 2016

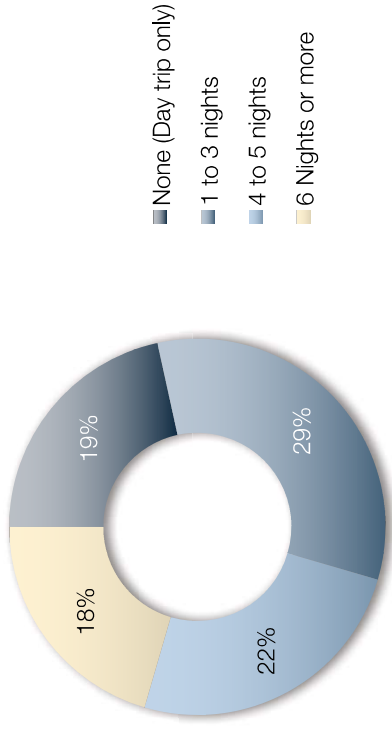




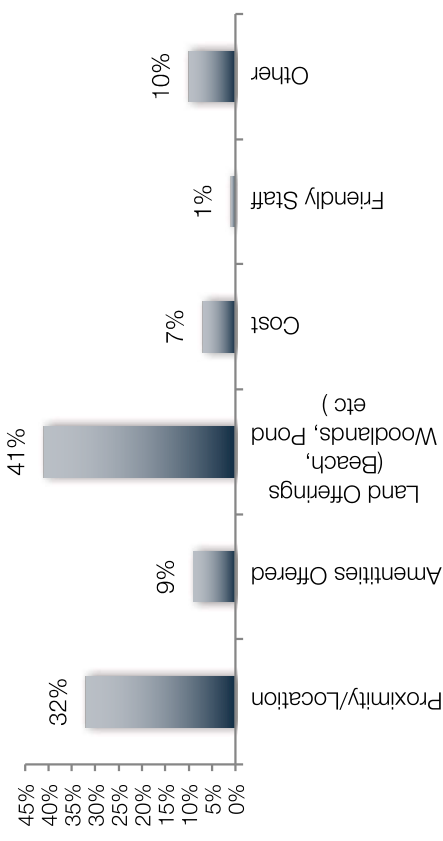
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DSP Main Purpose Visitor Behavior & Key Drivers of Park Visitation

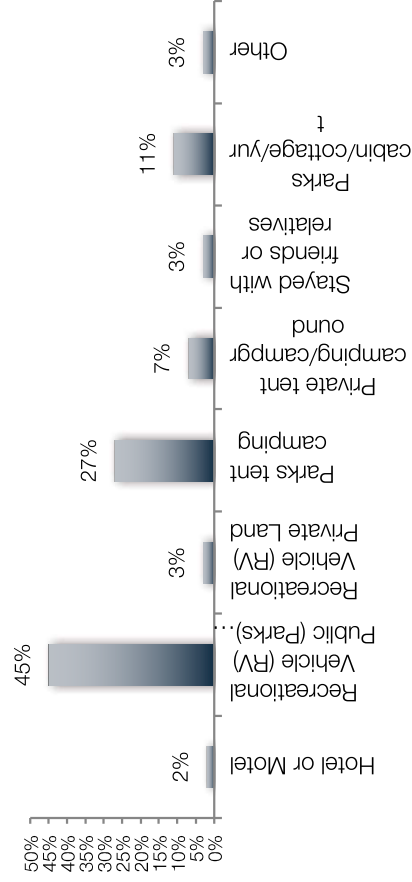
Average Length of Stay Amongst Park Visitors



Primary Reason for Visiting a Delaware State Park



Type of Lodging Accommodations Amongst Multi-Day Park Visitors



- The length of stay for visitors to Delaware State Parks was varied: 19% of visits were day trips, 29% were one to three night stays, 22% were four to five night stays and 18% stayed six nights or more.
- Public RV parks was the most common type of lodging accommodations among park visitors, utilized by 45% of visitors. This is followed by parks tent camping (27%) and parks cabins, cottages and yurts (11%).
- The biggest driver for visiting Delaware State Parks was the land offerings, including beaches, woodlands and ponds. The second biggest driver of park visitation was the visitor's proximity to the park.



Delaware Park Visitation and Spending Around the State



Source: Rockport Analytics

Delaware State Park Locations Total Attendance, Visitation, and Spending (FY 2016)

<ul style="list-style-type: none"> ● Lums Pond State Park 	<ul style="list-style-type: none"> -Total Attendance: 316,300 -Total Main Purpose Visitors: 71,700 -Visitor Spending: \$7.3 Million
<ul style="list-style-type: none"> ● Killens Pond State Park 	<ul style="list-style-type: none"> -Total Attendance: 261,000 -Total Main Purpose Visitors: 93,700 -Visitor Spending: \$6.5 Million
<ul style="list-style-type: none"> ● Cape Henlopen State Park 	<ul style="list-style-type: none"> -Total Attendance: 1,276,000 -Total Main Purpose Visitors: 591,100 -Visitor Spending: \$128.5 Million
<ul style="list-style-type: none"> ● Delaware Seashore State Park 	<ul style="list-style-type: none"> -Total Attendance: 1,055,800 -Total Main Purpose Visitors: 588,900 -Visitor Spending: \$173.0 Million
<ul style="list-style-type: none"> ● Trap Pond State Park 	<ul style="list-style-type: none"> -Total Attendance: 116,600 -Total Main Purpose Visitors: 51,100 -Visitor Spending: \$3.5 Million
<ul style="list-style-type: none"> ● All Day Use Parks 	<ul style="list-style-type: none"> -Total Attendance: 3,025,600 -Total Main Purpose Visitors: 194,400 -Visitor Spending: \$71.0 Million
<ul style="list-style-type: none"> ● All Camping Parks 	<ul style="list-style-type: none"> -Total Attendance: 2,696,600 -Total Main Purpose Visitors: 1,396,500 -Visitor Spending: \$318.9 Million
<ul style="list-style-type: none"> ● All State Parks 	<ul style="list-style-type: none"> -Total Attendance: 4,170,970 -Total Main Purpose Visitors: 1,591,000 -Visitor Spending: \$389.9 Million



In-State DSP-Initiated Spending by Source**

by Source in Millions \$	FY2016/2017
Visitor Ancillary Spending*	\$389.9
DSP Operations Spending (General Fund)	\$7.1
DSP Capital Spending (General Fund)	\$9.9
Total	\$406.9

Visitor Ancillary Spending

For visitors to DSP site destinations whose principal motivation to visit was the site. Includes hotel, transportation, shopping, food & beverage, and other entertainment spending.

DSP Operations Spending

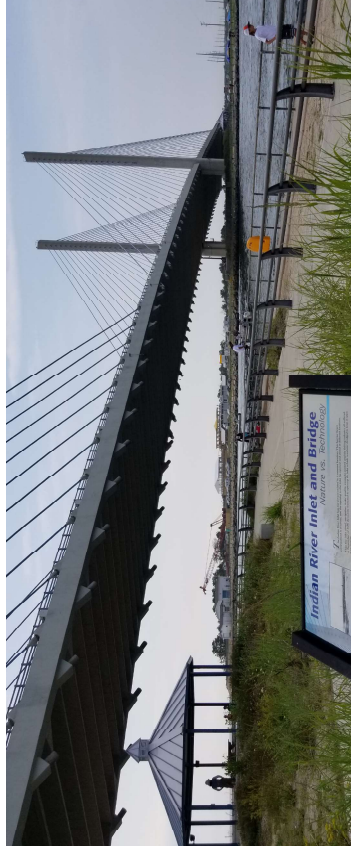
Local labor, supplies, and service expenditures that contributed to ongoing DSP operations during FY2016.

DSP Capital Spending

Identified non-routine spending on site upgrades, exhibit enhancement, and new facilities.

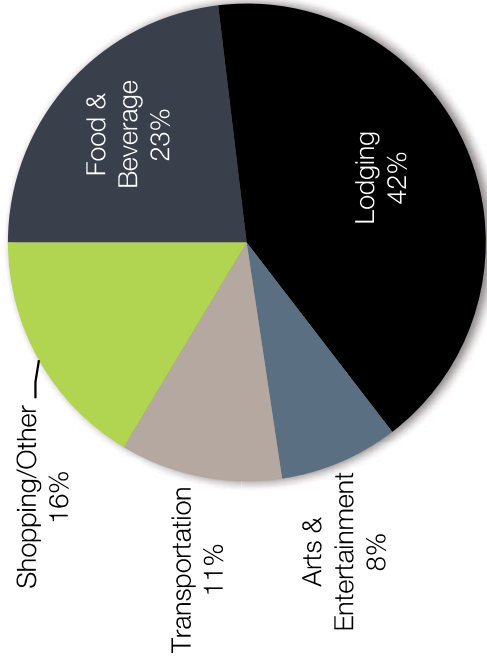
* Only the spending of visitors whose principal trip purpose was to visit a Delaware State Park.

**Source: Rockport Analytics, D.K. Shifflet & Associates, DSP Operating Statements





DSP-Initiated Ancillary Visitor Spending



Source: Rockport Analytics, D.K. Shifflet & Associates, Delaware Division of Parks and Recreation

- Of all DSP attendance in FY2016, about 55% were out of town visitors. Of those visitors, an estimated 68% identified a state park as their main trip motivation.
- Total ancillary visitor spending reached \$390 million in FY2016. Of this \$390 Million, \$318.9 million was spent in the five camping parks: Cape Henlopen, Delaware Seashore, Lums Pond, Trap Pond and Killens Pond. The remaining \$71 million was spent in the 11 day use parks around the state.
- On average, state park visitors spent \$245 per person in FY2016. This includes an average of \$228 among camping park visitors and \$365 among day use park visitors.

Visitor Spending by Category in Millions \$			
	All Visitors	Camping Park Visitors	Day Park Visitors
Food & Beverage	\$90.1	\$76.1	\$14.0
Lodging	\$161.7	\$125.5	\$36.2
Arts & Entertainment	\$31.4	\$23.0	\$8.3
Transportation	\$42.8	\$39.2	\$3.5
Shopping/Other	\$64.0	\$55.0	\$9.0
Total	\$389.9	\$318.9	\$71.0



Delaware State Park System

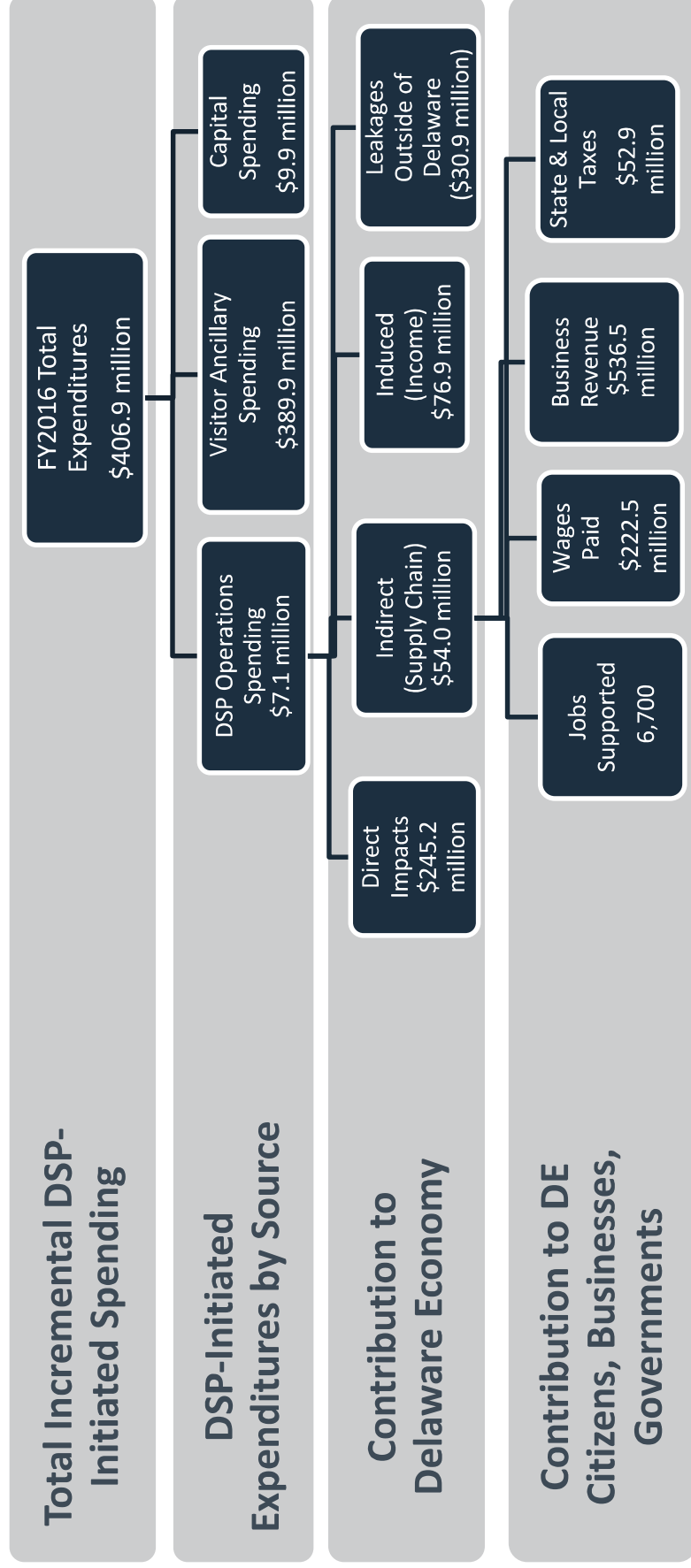
System-Wide Economic Impact on the State of Delaware



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DSP Total Economic Impact Reached \$376 million



The total FY2016 operating budget for the Delaware State Parks system was about \$7.1 million. Adding that to the ancillary spending of only those visitors whose main trip purpose was to visit a Delaware State Park and the Capital Expenditures of DSP, the total incremental economic impact of the DSP system reached \$376 million in FY2016. Even though residents also benefit from the DSP system, no resident spending was included in this analysis. Admission fees paid by visitors were also eliminated to avoid double-counting.

DSP Economic Impact Summary

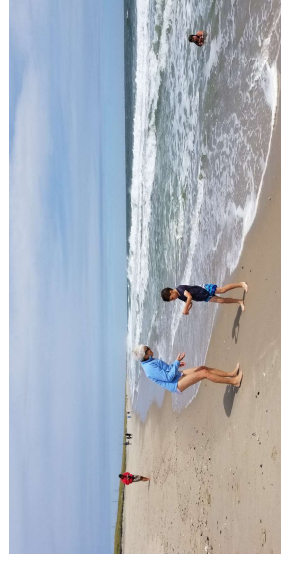
Metric	Direct	Indirect	Induced	Total
Total Main Purpose Visitor Volume				1,591,000
Total Main Purpose Ancillary Visitor Spending				\$389,888,000
Total DSP Operations Spending				\$7,146,000
Total DSP Capital Spending				\$9,868,000
Total DSP-Initiated Spending				
Economic Impact (GDP)	\$245,173,000	\$53,965,800	\$76,855,400	\$375,994,200
Wages	\$153,871,700	\$31,777,900	\$41,362,000	\$227,011,600
Jobs	5,200	600	900	6,700
Tax Receipts				
Federal				\$100,441,528
State & Local				\$47,571,293
				\$52,870,235

Impact Definitions

Direct: These impacts represent the value added (GDP) of those Delaware businesses that interact directly, or “touch”, the DSP visitor.

Indirect: These impacts represents the benefit to Delaware suppliers to those direct businesses. This would include, for example, local based food suppliers to restaurants.

Induced: These impacts are derived from the local spending of DSP-initiated wages.





The DSP Supports the Top Lines of Many Different Businesses Across the State

DSP: Economic Impact (Value Added or GDP in \$Thousands)

Industry (NAICS)*	Direct	Indirect	Induced	Total
Accommodation & Food Services	\$127,499	\$2,508	\$3,709	\$133,716
Retail Trade	\$87,659	\$736	\$11,640	\$100,034
Real Estate & Rental	\$385	\$7,319	\$18,043	\$25,747
Arts- Entertainment & Recreation	\$17,073	\$813	\$1,287	\$19,173
Finance & Insurance	\$266	\$6,579	\$10,781	\$17,625
Health & Social Services	\$103	\$4	\$12,088	\$12,194
Professional(Scientific & Tech Services)	\$200	\$7,260	\$3,335	\$10,795
Transportation & Warehousing	\$5,674	\$1,879	\$1,022	\$8,575
Administrative & Waste Services	\$639	\$4,809	\$1,379	\$6,826
Wholesale Trade	\$108	\$2,678	\$3,309	\$6,095
Information	\$187	\$3,978	\$1,897	\$6,061
Construction	\$4,654	\$590	\$518	\$5,763
Utilities	\$-	\$4,342	\$1,388	\$5,730
Other services	\$151	\$1,986	\$3,188	\$5,325
Management of Companies	\$-	\$4,517	\$623	\$5,140
Government & Non-NAICs	\$284	\$2,191	\$732	\$3,207
Manufacturing	\$293	\$1,637	\$925	\$2,855
Educational Services	\$-	\$32	\$874	\$906
Ag, Forestry, Fish & Hunting	\$-	\$94	\$111	\$206
Mining	\$-	\$14	\$8	\$21
Total	\$245,173	\$53,966	\$76,855	\$375,994

Direct

Businesses that serve Delaware visitors

Indirect

Supply Chain businesses that often do not fully appreciate the benefits visitors bring to Delaware

Induced

Tourism-supported workers spend much of their wages locally creating benefits to virtually all local businesses

* North American Industrial Classification System (NAICS). For specific industry definitions, see www.census.gov





DSP Activity Supports a Wide Array of Jobs Around the State

DSP: Delaware Jobs Supported by DSP Activity by Sector

Industry (NAICS)	Direct	Indirect	Induced	Total
Accommodation & Food Services	2,659	68	101	2,828
Retail Trade	1,795	14	216	2,024
Arts- Entertainment & Recreation	532	43	28	603
Health & Social Services	1	0	180	181
Administrative & Waste Services	13	110	31	155
Real Estate & Rental	1	73	57	132
Other services	3	31	96	130
Transportation & Warehousing	88	25	15	128
Finance & Insurance	2	34	68	104
Professional(Scientific & Tech Services)	2	72	26	100
Construction	72	9	8	88
Government & Non-NAICS	3	27	11	41
Information	1	28	11	40
Management of Companies	0	31	4	36
Wholesale Trade	1	16	19	36
Educational Services	0	1	21	21
Manufacturing	4	11	6	21
Utilities	0	8	3	11
Ag, Forestry, Fish & Hunting	0	2	1	3
Mining	0	0	0	0
Total	5,176	605	903	6,684

- ✓ Over 5,000 jobs were directly supported by DSP activity. Another 326 jobs were supported by the supply chain of the DSP system and other businesses that directly served “main purpose” visitors. Finally, 846 more jobs were supported by the spending of wages paid (Induced) to both direct and indirect workers.
- ✓ The contribution to supply chain businesses (Indirect) is often underappreciated. For example, nearly 85 Finance & Insurance jobs owe their existence to DSP visitors.
- ✓ Other key beneficiaries of the DSP system include Professional Services, Construction and Health & Social Services.
- ✓ DSP payrolls comprised 126 of the 1,483 direct jobs identified in the Arts, Entertainment & Recreation industry.

Source: IMPLAN, Rockport Analytics, DSP Statements





FY2016 DSP-Initiated Tax Revenue

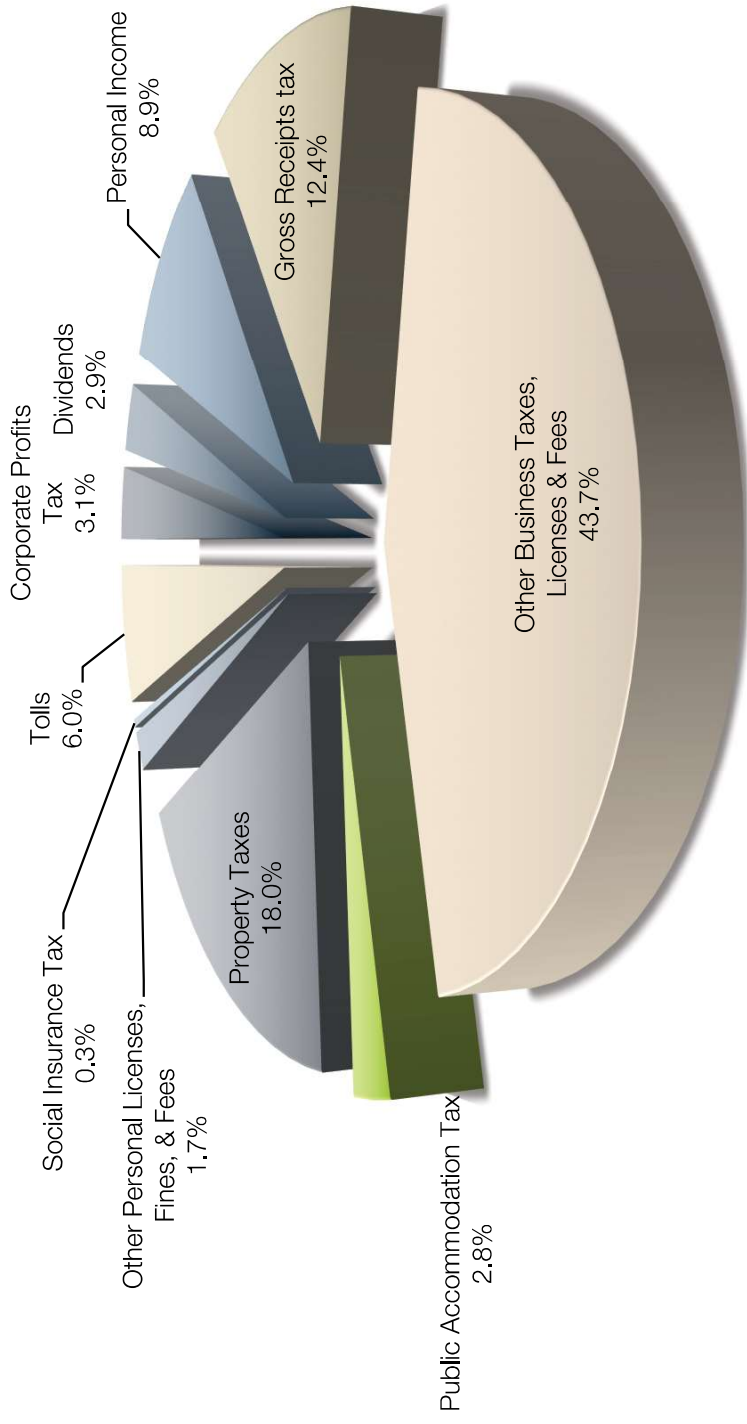
<i>In thousands of dollars</i>		
	Receipts	% Total
Federal Government	\$47,571.3	100%
Corporate Taxes	\$10,513.8	22.1%
Personal Income Tax	\$12,310.7	25.9%
Social Insurance Tax	\$24,746.8	52.0%
State/Local Government	\$52,870.2	100.0%
Corporate Profits Tax	\$1,661.3	3.1%
Dividends	\$1,543.6	2.9%
Personal Income	\$4,727.7	8.9%
Gross Receipts Taxes	\$6,579.1	12.4%
Other Business Taxes, Licenses & Fees	\$23,086.5	43.7%
Public Accommodation Tax	\$1,479.0	2.8%
Property Taxes	\$9,532.1	18.0%
Other Personal Licenses, Fines, & Fees	\$899.5	1.7%
Social Insurance Tax	\$179.4	0.3%
Tolls	\$3,181.9	6.0%
Grand Total	\$100,441.5	100%

DSP System-Wide Activity Contributed Significantly to Federal, State and Local Governments

- If DSP did not exist, taxing authorities around the state would need to generate an average of \$151 in additional state & local taxes from each of Delaware's 350,000 households in order to maintain current levels of tax receipts.
- DSP-initiated total tax receipts eclipsed \$100 million in FY2016, \$47.6 million of which went to Federal coffers and \$52.9 million to state and municipal governments around the state.
- About 44% (\$23.1 million) of state collections were comprised of other business taxes, licenses and fees. Tolls added another 6% of the total and property taxes 18% of the total.
- Transactional taxes also provided substantial income from the state which collected an estimated \$6.6 million in gross receipts taxes and \$1.5 million on lodging taxes from state park visitors.



FY2016 Delaware State Park System State & Local Tourism Tax Sources Total = \$52.9 million



Source: Rockport Analytics, IMPLAN, Delaware Department of Revenue & Transportation





Delaware State Parks Impact in Perspective



How Does the Delaware State Park System Benefit the State?

By Helping to Support a Healthy Job Market

Delaware State Park activity supports over 6,000 jobs in the state, only 126 of which is a direct employee of the System. The others are employed by local hotels, restaurants, and retail businesses, as well as high-paid jobs in professional & business services, health & social services, and finance & insurance.

By Contributing to the Health of Public Education

State & local tax revenue initiated by Delaware State Parks is sufficient to support 3,300 Delaware public school students or pay the salary of 933 new school teachers.

By Providing Critical Tax Revenue to State & Local Government

Each main purpose Delaware State Parks visitor pays about \$33 in state and local taxes. In addition to hotel occupancy levies (\$1.5 million in FY2016), the parks system generated \$6.6 million in Delaware gross receipts taxes, \$4.7 million in Delaware personal income tax, and \$9.5 million in local property taxes.

By Helping to Relieve the Tax Burden of Delaware Households

If the state parks system did not exist, each of Delaware's 350,000 households would have to pay an additional \$151 per year in taxes to maintain current state & local tax levels.

By Capturing and Retaining the Expenditures Made By Visitors

Of every dollar spent by main purpose visitors to a Delaware State Park, 92¢ in economic impact is returned to the Delaware economy.

Delaware State Park System

FY 2016/2017 Visitation, Spending & Economic
Impact of the Camping Parks



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Cape Henlopen State Park

Visitor Performance, Spending &
Economic Impact



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Cape Henlopen Economic Impact Headlines

✓ **591,141**

Cape Henlopen Main Purpose Visitors

✓ **\$131.2 million**

Cape Henlopen-Initiated Incremental Local Spending

✓ **2,028**

Full and Part Time area Jobs Supported

✓ **\$70.8 million**

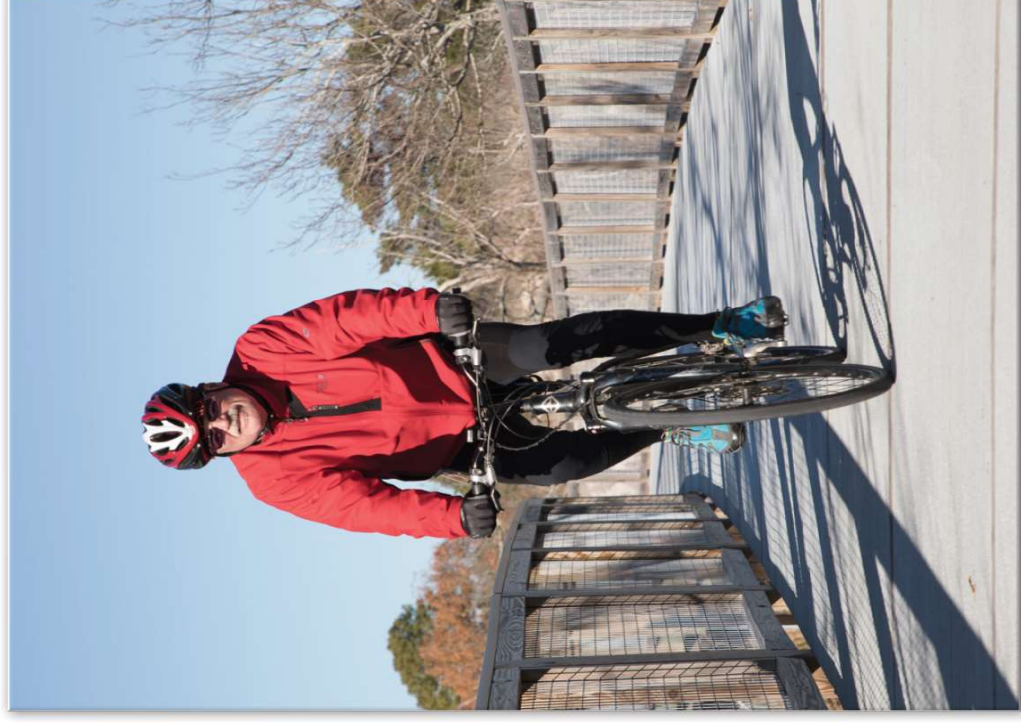
Paid Wages to Cape Henlopen- Supported Jobs

✓ **\$16.7 million**

Cape Henlopen-Initiated State & Local Taxes

✓ **\$119.4 million**

Total Economic Impact (Value Added) to the region



Source: Rockport Analytics, IMPLAN, Smith Travel Research, DSP Financial Statements, DKSA



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Cape Henlopen is Ranked 2nd in Visitor Spend Among the State's 16 Parks

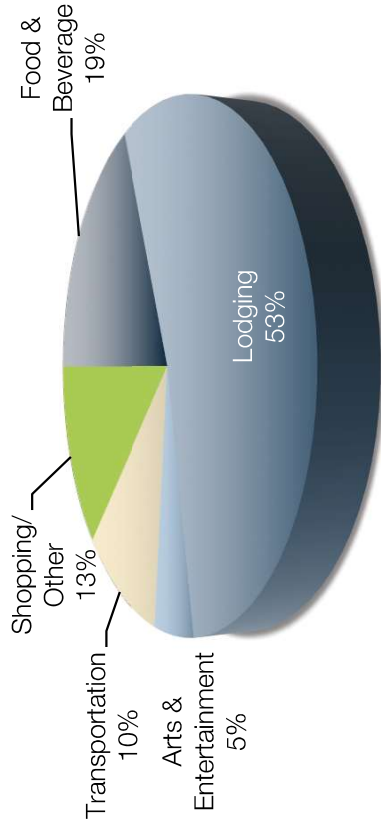
Delaware State Parks Visitation & Visitor Spending FY 2016/2017

	Total Park Attendance	Park Visitors*	Visitor Spending	Share of Total Spending	Spending Rank
Delaware Seashore State Park & Indian River Marina	1,055,759	588,906	\$172,984,023	44.4%	1
Cape Henlopen State Park	1,276,040	591,141	\$128,481,875	33.0%	2
Fenwick Island State Park	232,832	115,909	\$60,032,326	15.4%	3
Lums Pond State Park	316,253	71,726	\$7,323,283	1.9%	4
Killens Pond State Park	260,959	93,698	\$6,548,569	1.7%	5
Bellevue State Park	351,235	30,230	\$4,236,074	1.1%	6
Trap Pond State Park	116,626	51,050	\$3,512,408	0.9%	7
White Clay Creek State Park	175,076	15,068	\$2,111,508	0.5%	8
Brandywine Creek State Park	129,006	11,103	\$1,555,877	0.4%	9
Alapocas Run State Park	109,229	9,401	\$1,317,356	0.3%	10
Brandywine Zoo	97,686	8,408	\$1,178,060	0.3%	11
First State Heritage Park at Dover	18,878	1,625	\$227,662	0.1%	12
Fort Delaware State Park	14,128	1,216	\$170,379	0.0%	13
Holts Landing State Park	8,592	739	\$103,621	0.0%	14
Fort DuPont State Park	5,485	472	\$66,148	0.0%	15
Auburn Heights Preserve	3,188	274	\$38,443	0.0%	16
All Camping Parks	3,025,637	1,396,522	\$318,850,159	N/A	N/A
All Day Use Parks	1,145,333	194,445	\$71,037,456	N/A	N/A
All State Parks	4,170,969	1,590,967	\$389,887,614	N/A	N/A



Cape Henlopen-Initiated Main Purpose Visitor Spending by Category

Cape Henlopen-Initiated Ancillary Visitor Spend



Source: Rockport Analytics, D.K. Shifflet & Associates, Delaware Division of Parks and Recreation

Visitor Spending by Category in Millions \$	
	All Visitors
Food & Beverage	\$24.25
Lodging	\$67.83
Arts & Entertainment	\$6.43
Transportation	\$13.32
Shopping/Other	\$16.65
Total *	\$128.48

- About 87% of Cape Henlopen overnight visitors were out of town visitors. Of those overnight visitors, an estimated 85% identified Cape Henlopen as their main trip motivation.
- The average length of stay amongst Cape Henlopen overnight main-purpose visitors was 3.7 days. This includes any additional lodging stay around the area of the park.
- Total Cape Henlopen ancillary visitor spending surpassed \$128 million with 72% being spent on lodging and F&B. On average, Cape Henlopen visitors spent \$217 per person.



Cape Henlopen Economic Impact Summary

Metric	Direct	Indirect	Induced	Total
Total Main Purpose Visitor Volume				902,650
Total Main Purpose Ancillary Visitor Spending				\$128,481,875
Total Cape Henlopen Operations Spending				\$687,019
Total Cape Henlopen Capital Spending				\$1,988,251
Total Cape Henlopen-Initiated Spending				
Economic Impact (GDP)	\$76,392,644	\$19,024,778	\$24,002,614	\$119,420,036
Wages Paid	\$46,660,742	\$11,253,304	\$12,916,626	\$70,830,671
Jobs Supported	1,534	212	282	2,028
Tax Receipts				
Federal				\$31,661,403
State & Local				\$14,918,928
				\$16,742,475

Impact Definitions

Direct: These impacts represent the value added (GDP) of those Delaware businesses that interact directly, or “touch”, the DSP visitor.

Indirect: These impacts represents the benefit to Delaware suppliers to those direct businesses. This would include, for example, local based food suppliers to restaurants.

Induced: These impacts are derived from the local spending of DSP-initiated wages.





FY2016 Cape Henlopen-Initiated Tax Revenue

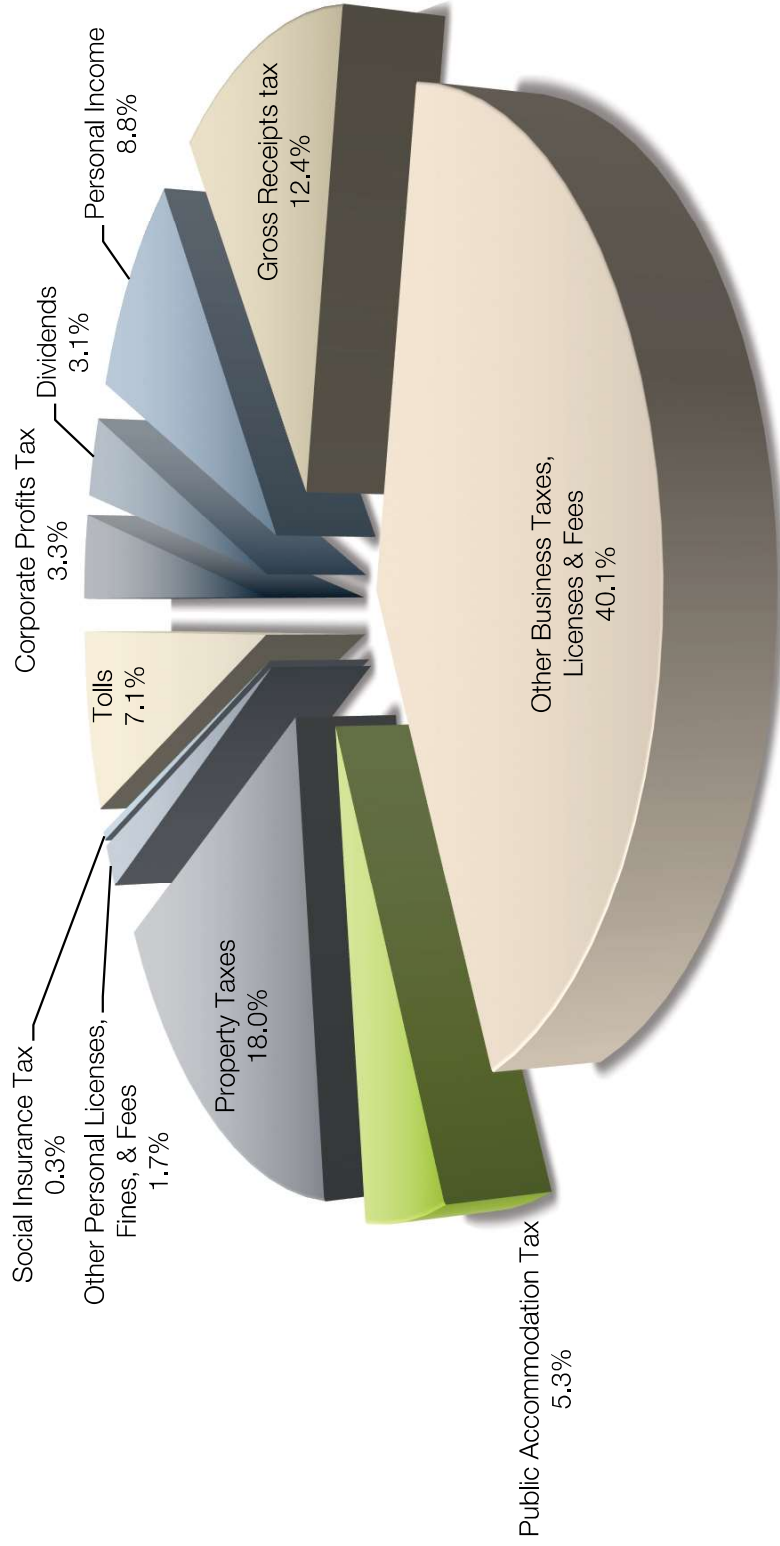
<i>In thousands of dollars</i>		
	Receipts	% Total
Federal Government	\$14,918.9	100%
Corporate Taxes	\$3,384.1	23%
Personal Income Tax	\$3,845.9	26%
Social Insurance Tax	\$7,689.0	52%
State/Local Government	\$16,742.5	100%
Corporate Profits Tax	\$550.3	3%
Dividends	\$511.3	3%
Personal Income	\$1,476.9	9%
Gross Receipts Taxes	\$2,080.2	12%
Other Business Taxes, Licenses & Fees	\$6,705.8	40%
Public Accommodation Tax	\$885.5	5%
Property Taxes	\$3,013.7	18%
Other Personal Licenses, Fines, & Fees	\$281.0	2%
Social Insurance Tax	\$55.5	0%
Tolls	\$1,182.3	7%
Grand Total	\$31,661.4	100%

Cape Henlopen Activity Contributed Significantly to Federal, State and Local Governments

- Cape Henlopen-initiated total tax receipts reached \$31.7 million in FY2016, \$15 million of which went to Federal coffers and \$16.7 million to state and municipal governments around the state.
- About 40% (\$6.7 million) of state collections were comprised of other business taxes, licenses and fees. Tolls added another 7% of the total and property taxes 18% of the total.
- Transactional taxes also provided substantial income for the state which collected an estimated \$2.1 million in gross receipts taxes and \$885,500 in lodging taxes from state park visitors.



FY2016 Cape Henlopen State Park State & Local Tourism Tax Sources Total = \$16.7 million



Source: Rockport Analytics, IMPLAN, Delaware Department of Revenue & Transportation



Delaware Seashore State Park & Indian River Marina

Visitor Performance, Spending & Economic Impact



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Delaware Seashore Economic Impact Headlines

✓ **588,906**

Delaware Seashore Main Purpose Visitors

✓ **\$173.0 million**

Delaware Seashore-Initiated Incremental Local Spending

✓ **3,035**

Full and Part Time area Jobs Supported

✓ **\$100.4 million**

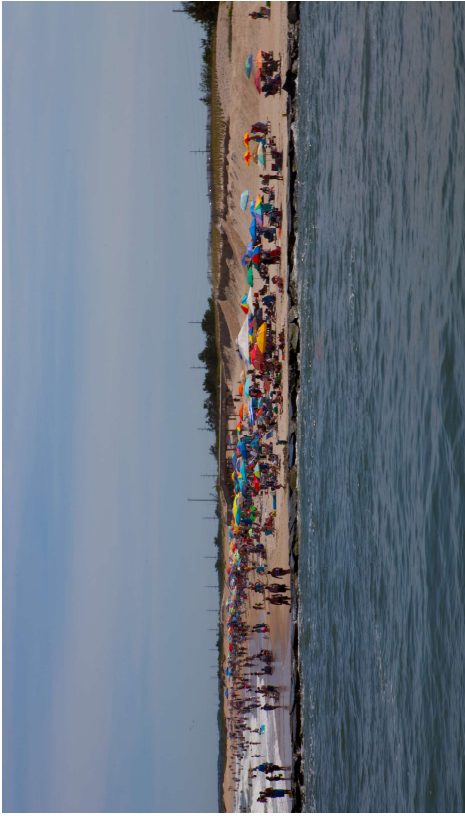
Paid Wages to Delaware Seashore-Supported Jobs

✓ **\$24.1 million**

Delaware Seashore-Initiated State & Local Taxes

✓ **\$166.7 million**

Total Economic Impact (Value Added)



Source: Rockport Analytics, IMPLAN, Smith Travel Research, DSP Financial Statements, DKSA



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Delaware Seashore is Ranked 1st in Visitor Spend Among the State's 16 Parks

Delaware State Parks Visitation & Visitor Spending FY 2016/2017

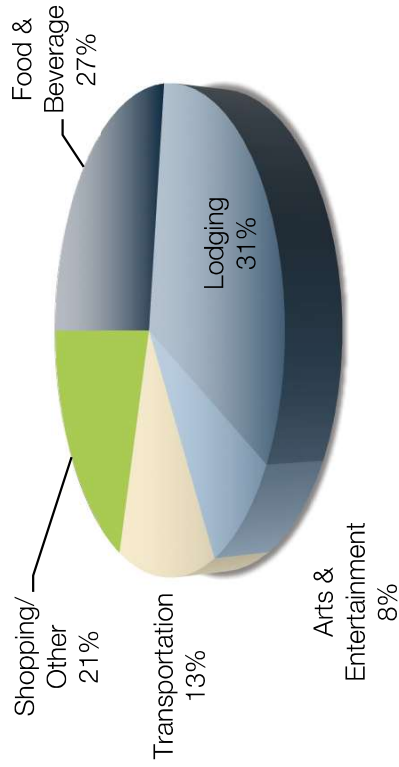
	Total Park Attendance	Park Visitors*	Visitor Spending	Share of Total Spending	Spending Rank
Delaware Seashore State Park & Indian River Marina	1,055,759	588,906	\$172,984,023	44.4%	1
Cape Henlopen State Park	1,276,040	591,141	\$128,481,875	33.0%	2
Fenwick Island State Park	232,832	115,909	\$60,032,326	15.4%	3
Lums Pond State Park	316,253	71,726	\$7,323,283	1.9%	4
Killens Pond State Park	260,959	93,698	\$6,548,569	1.7%	5
Bellevue State Park	351,235	30,230	\$4,236,074	1.1%	6
Trap Pond State Park	116,626	51,050	\$3,512,408	0.9%	7
White Clay Creek State Park	175,076	15,068	\$2,111,508	0.5%	8
Brandywine Creek State Park	129,006	11,103	\$1,555,877	0.4%	9
Alapocas Run State Park	109,229	9,401	\$1,317,356	0.3%	10
Brandywine Zoo	97,686	8,408	\$1,178,060	0.3%	11
First State Heritage Park at Dover	18,878	1,625	\$227,662	0.1%	12
Fort Delaware State Park	14,128	1,216	\$170,379	0.0%	13
Holts Landing State Park	8,592	739	\$103,621	0.0%	14
Fort DuPont State Park	5,485	472	\$66,148	0.0%	15
Auburn Heights Preserve	3,188	274	\$38,443	0.0%	16
All Camping Parks	3,025,637	1,396,522	\$318,850,159	N/A	N/A
All Day Use Parks	1,145,333	194,445	\$71,037,456	N/A	N/A
All State Parks	4,170,969	1,590,967	\$389,887,614	N/A	N/A





Delaware Seashore-Initiated Main Purpose Visitor Spending by Category

Delaware Seashore-Initiated Ancillary Visitor Spend



Source: Rockport Analytics, D.K. Shifflet & Associates, Delaware Division of Parks and Recreation

- About 96% of Delaware Seashore overnight visitors were out of town visitors. Of those overnight visitors, an estimated 81% identified Delaware Seashore as their main trip motivation.
- The average length of stay amongst Delaware Seashore overnight visitors was 4.9 days. This includes any additional lodging stay around the area of the park.
- Total Delaware Seashore ancillary visitor spending was nearly \$173 million with 58% being spent on lodging and F&B. On average, Delaware Seashore visitors spent \$294 per person.

Visitor Spending by Category in Millions \$	
	All Visitors
Food & Beverage	\$46.89
Lodging	\$52.86
Arts & Entertainment	\$14.55
Transportation	\$23.19
Shopping/Other	\$35.48
Total *	\$172.98





Delaware Seashore Economic Impact Summary

Metric	Direct	Indirect	Induced	Total
Total Main Purpose Visitor Volume				817,132
Total Main Purpose Ancillary Visitor Spending				\$172,984,023
Total DSSP Operations Spending				\$1,659,833
Total DSSP Capital Spending				\$645,923
Total DSSP-Initiated Spending				\$175,289,780
Economic Impact (GDP)	\$110,892,675	\$21,828,685	\$33,963,575	\$166,684,936
Wages Paid	\$69,543,609	\$12,601,534	\$18,280,170	\$100,425,313
Jobs Supported	2,392	244	399	3,035
Tax Receipts				\$45,265,085
Federal				\$21,176,243
State & Local				\$24,088,842

Impact Definitions

Direct: These impacts represent the value added (GDP) of those Delaware businesses that interact directly, or “touch”, the DSP visitor.

Indirect: These impacts represents the benefit to Delaware suppliers to those direct businesses. This would include, for example, local based food suppliers to restaurants.

Induced: These impacts are derived from the local spending of DSP-initiated wages.



FY2016 DE Seashore-Initiated Tax Revenue

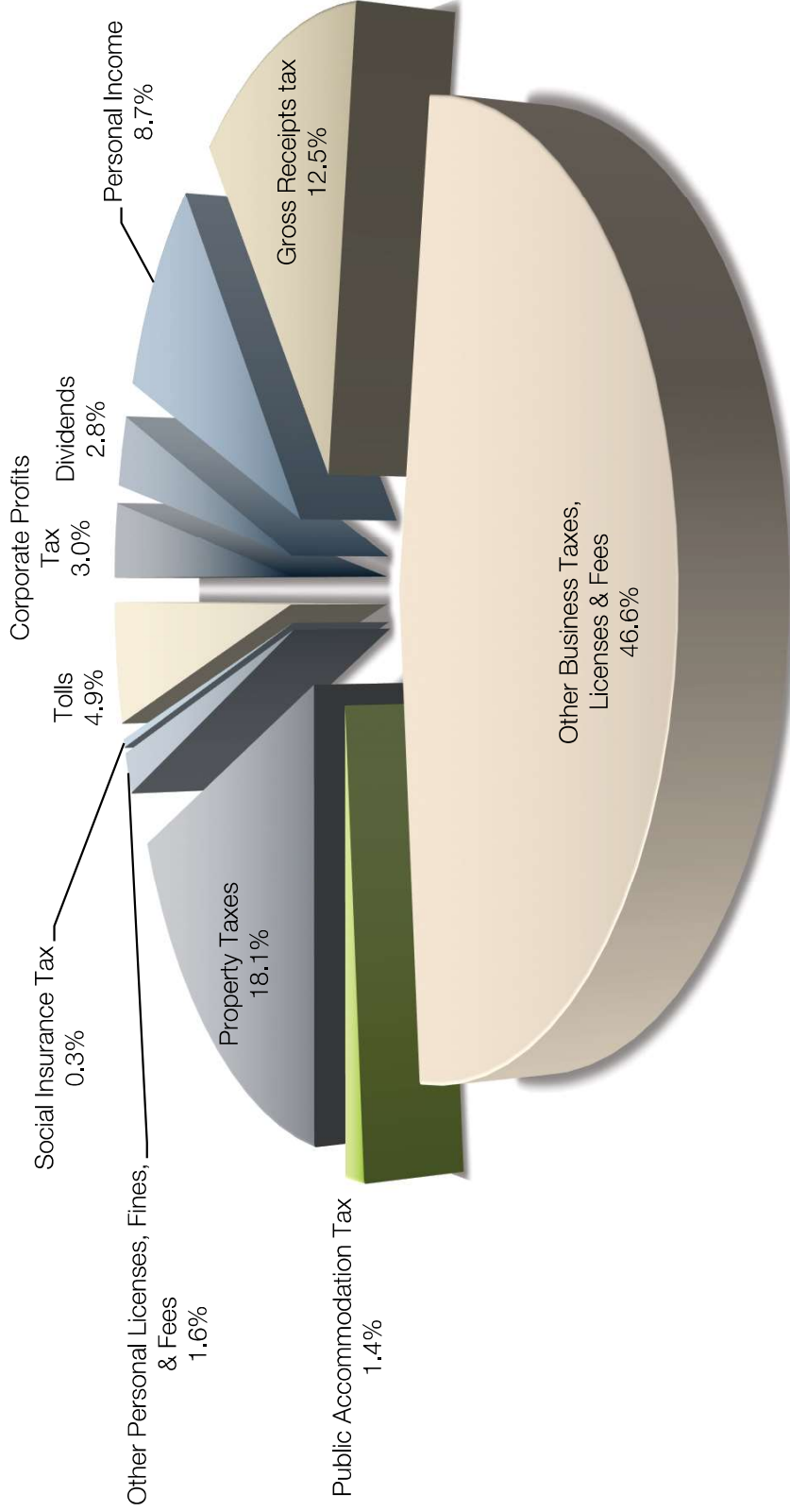
	<i>In thousands of dollars</i>	
	Receipts	% Total
Federal Government	\$21,176.2	100%
Corporate Taxes	\$4,739.3	22%
Personal Income Tax	\$5,438.5	26%
Social Insurance Tax	\$10,998.4	52%
State/Local Government	\$24,088.8	100%
Corporate Profits Tax	\$727.0	3%
Dividends	\$675.4	3%
Personal Income	\$2,088.6	9%
Gross Receipts Taxes	\$3,018.3	13%
Other Business Taxes, Licenses & Fees	\$11,226.4	47%
Public Accommodation Tax	\$325.7	1%
Property Taxes	\$4,372.1	18%
Other Personal Licenses, Fines, & Fees	\$397.4	2%
Social Insurance Tax	\$80.1	0%
Tolls	\$1,177.8	5%
Grand Total	\$45,265.1	100%

DE Seashore Activity Contributed Significantly to Federal, State and Local Governments

- DE Seashore-initiated total tax receipts reached \$45.3 million in FY2016, \$21.2 million of which went to Federal coffers and \$24.1 million to state and municipal governments around the state.
- Nearly 47% (\$11.2 million) of state collections were comprised of other business taxes, licenses and fees. Tolls added another 5% of the total and property taxes 18% of the total.
- Transactional taxes also provided substantial income for the state which collected an estimated \$3 million in gross receipts taxes and \$325,700 on lodging taxes from state park visitors.



FY2016 Delaware Sea Shore State Park State & Local Tourism Tax Sources Total = \$24.1 million



Source: Rockport Analytics, IMPLAN, Delaware Department of Revenue & Transportation



Killens Pond State Park

Visitor Performance, Spending & Economic Impact



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Killens Pond Economic Impact Headlines

✓ **93,698**

Killens Pond Main Purpose Visitors

✓ **\$10.3 million**

Killens Pond-Initiated Incremental Local Spending

✓ **167**

Full and Part Time area Jobs Supported

✓ **\$6.3 million**

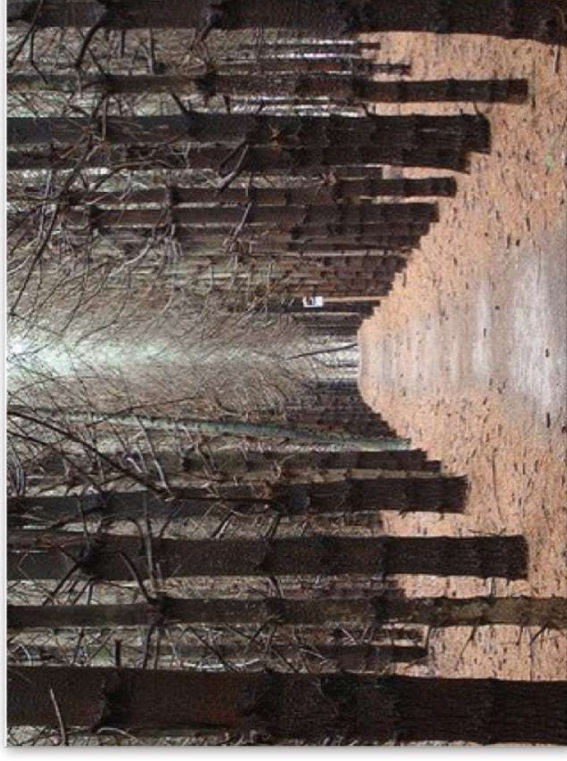
Paid Wages to Killens Pond-Supported Jobs

✓ **\$1.2 million**

Killens Pond-Initiated State & Local Taxes

✓ **\$9.7 million**

Total Economic Impact (Value Added)



Source: Rockport Analytics, IMPLAN, Smith Travel Research, DSP Financial Statements, DKSA



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Killens Pond is Ranked 5th in Visitor Spend Among the State's 16 Parks

Delaware State Parks Visitation & Visitor Spending FY 2016/2017

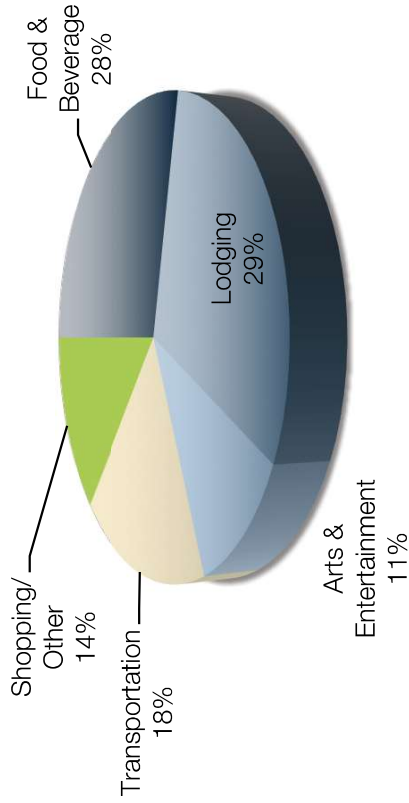
	Total Park Attendance	Park Visitors*	Visitor Spending	Share of Total Spending	Spending Rank
Delaware Seashore State Park & Indian River Marina	1,055,759	588,906	\$172,984,023	44.4%	1
Cape Henlopen State Park	1,276,040	591,141	\$128,481,875	33.0%	2
Fenwick Island State Park	232,832	115,909	\$60,032,326	15.4%	3
Lums Pond State Park	316,253	71,726	\$7,323,283	1.9%	4
Killens Pond State Park	260,959	93,698	\$6,548,569	1.7%	5
Bellevue State Park	351,235	30,230	\$4,236,074	1.1%	6
Trap Pond State Park	116,626	51,050	\$3,512,408	0.9%	7
White Clay Creek State Park	175,076	15,068	\$2,111,508	0.5%	8
Brandywine Creek State Park	129,006	11,103	\$1,555,877	0.4%	9
Alapocas Run State Park	109,229	9,401	\$1,317,356	0.3%	10
Brandywine Zoo	97,686	8,408	\$1,178,060	0.3%	11
First State Heritage Park at Dover	18,878	1,625	\$227,662	0.1%	12
Fort Delaware State Park	14,128	1,216	\$170,379	0.0%	13
Holts Landing State Park	8,592	739	\$103,621	0.0%	14
Fort DuPont State Park	5,485	472	\$66,148	0.0%	15
Auburn Heights Preserve	3,188	274	\$38,443	0.0%	16
All Camping Parks	3,025,637	1,396,522	\$318,850,159	N/A	N/A
All Day Use Parks	1,145,333	194,445	\$71,037,456	N/A	N/A
All State Parks	4,170,969	1,590,967	\$389,887,614	N/A	N/A





Killens Pond-Initiated Main Purpose Visitor Spending by Category

Killens Pond-Initiated Ancillary Visitor Spend



Visitor Spending by Category in Millions \$	
	All Visitors
Food & Beverage	\$1.86
Lodging	\$1.89
Arts & Entertainment	\$0.71
Transportation	\$1.18
Shopping/Other	\$0.91
Total *	\$6.55

- About 79% of Killens Pond overnight visitors were out of town visitors. Of those visitors, an estimated 71% identified Killens Pond as their main trip motivation.
- The average length of stay amongst Killens Pond overnight visitors was 3.5 days. This includes any additional lodging stay around the area of the park.
- Total Killens Pond ancillary visitor spending reached \$6.6 million with 57% being spent on lodging and F&B. On average, Killens Pond visitors spent \$70 per person.

Source: Rockport Analytics, D.K. Shifflet & Associates, Delaware Division of Parks and Recreation, Visitor surveys





Killens Pond Economic Impact Summary

Metric	Direct	Indirect	Induced	Total
Total Main Purpose Visitor Volume				156,453
Total Main Purpose Ancillary Visitor Spending				\$6,548,569
Total Killens Pond Operations Spending				\$490,058
Total Killens Pond Capital Spending				\$3,214,094
Total Killens Pond-Initiated Spending				
Economic Impact (GDP)	\$6,234,514	\$1,322,298	\$2,133,934	\$9,690,747
Wages Paid	\$4,355,435	\$790,539	\$1,148,297	\$6,294,271
Jobs Supported	128	14	25	167
Tax Receipts				
Federal				\$2,413,403
State & Local				\$1,255,355
				\$1,158,048

Impact Definitions

Direct: These impacts represent the value added (GDP) of those Delaware businesses that interact directly, or “touch”, the DSP visitor.

Indirect: These impacts represents the benefit to Delaware suppliers to those direct businesses. This would include, for example, local based food suppliers to restaurants.

Induced: These impacts are derived from the local spending of DSP-initiated wages.





FY2016 Killens Pond-Initiated Tax Revenue

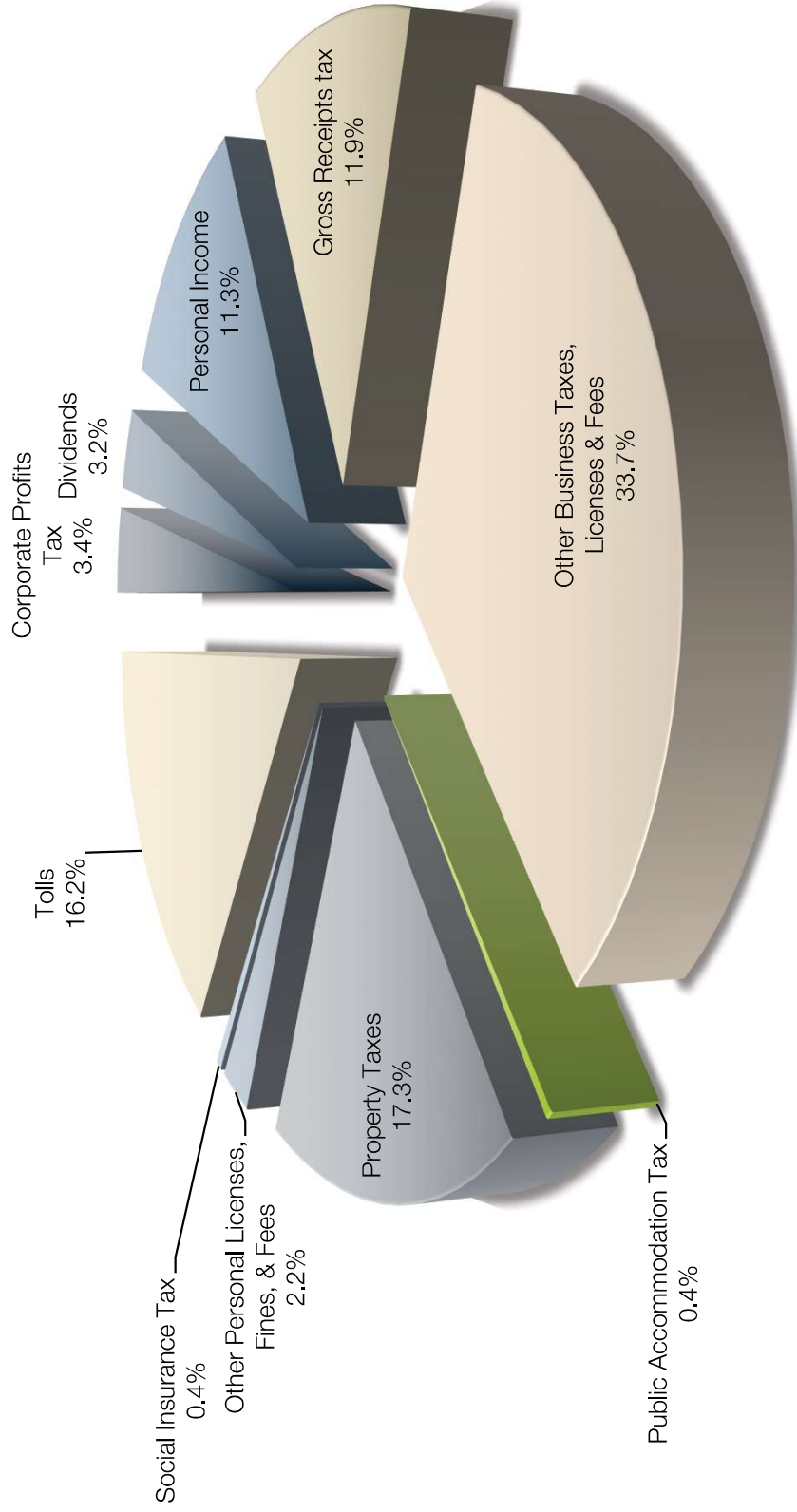
<i>In thousands of dollars</i>		
	Receipts	% Total
Federal Government	\$1,255.4	100%
Corporate Taxes	\$231.5	18%
Personal Income Tax	\$342.0	27%
Social Insurance Tax	\$681.9	54%
State/Local Government	\$1,158.0	100%
Corporate Profits Tax	\$39.4	3%
Dividends	\$36.6	3%
Personal Income	\$131.3	11%
Gross Receipts Taxes	\$138.1	12%
Other Business Taxes, Licenses & Fees	\$390.7	34%
Public Accommodation Tax	\$4.2	0.4%
Property Taxes	\$200.4	17%
Other Personal Licenses, Fines, & Fees	\$25.0	2%
Social Insurance Tax	\$4.9	0%
Tolls	\$187.4	16%
Grand Total	\$2,413.4	100%

Killens Pond Activity Contributed Significantly to Federal, State and Local Governments

- Killens Pond-initiated total tax receipts reached \$2.4 million in FY2016, \$1.26 million of which went to Federal coffers and \$1.16 million to state and municipal governments around the state.
- About 34% (\$390.7k) of state collections were comprised of other business taxes, licenses and fees. Tolls added another 16% of the total and property taxes 17% of the total.
- Transactional taxes also provided substantial income for the state which collected an estimated \$138k in gross receipts taxes and \$4.2k in lodging taxes from state park visitors.



FY2016 Killens Pond State & Local Tourism Tax Sources Total = \$1.2 million



Source: Rockport Analytics, IMPLAN, Delaware Department of Revenue & Transportation



Lums Pond State Park

Visitor Performance, Spending & Economic Impact



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Lums Pond Economic Impact Headlines

✓ **71,726**

Lums Pond Main Purpose Visitors

✓ **\$10.2 million**

Lums Pond-Initiated Incremental Local Spending

✓ **172**

Full and Part Time area Jobs Supported

✓ **\$6.1 million**

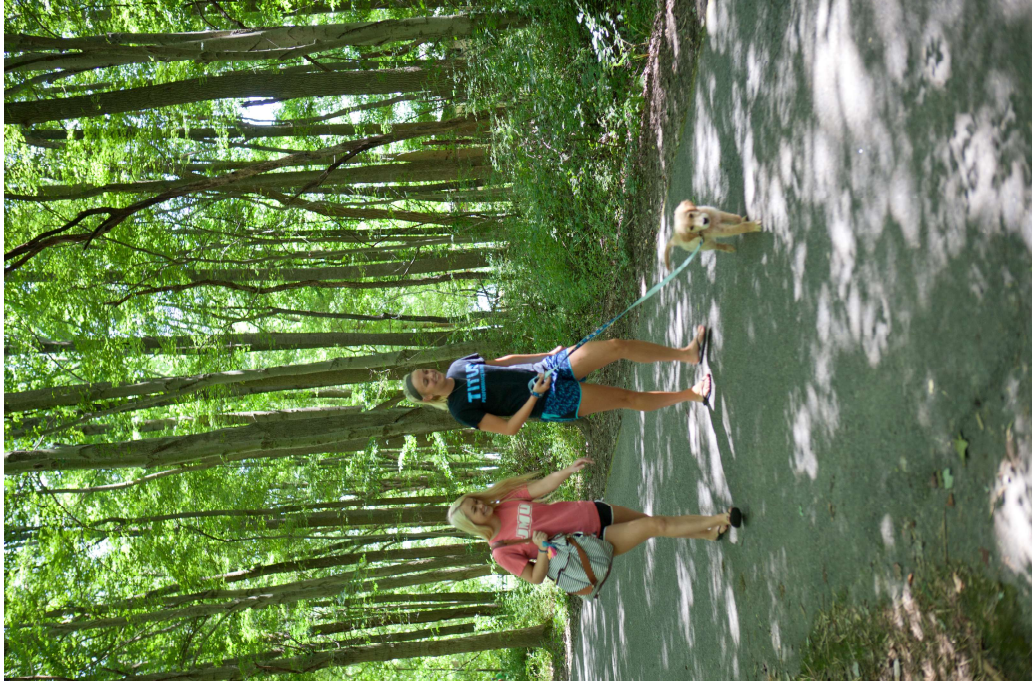
Paid Wages to Lums Pond-Supported Jobs

✓ **\$1.2 million**

Lums Pond-Initiated State & Local Taxes

✓ **\$9.6 million**

Total Economic Impact (Value Added)



Source: Rockport Analytics, IMPLAN, Smith Travel Research, DSP Financial Statements, DKSA



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Lums Pond is Ranked 4th in Visitor Spend Among the State's 16 Parks

Delaware State Parks Visitation & Visitor Spending FY 2016/2017

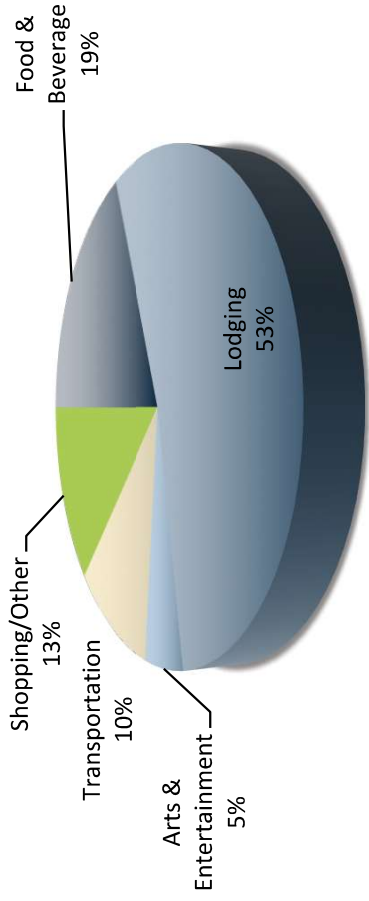
	Total Park Attendance	Park Visitors*	Visitor Spending	Share of Total Spending	Spending Rank
Delaware Seashore State Park & Indian River Marina	1,055,759	588,906	\$172,984,023	44.4%	1
Cape Henlopen State Park	1,276,040	591,141	\$128,481,875	33.0%	2
Fenwick Island State Park	232,832	115,909	\$60,032,326	15.4%	3
Lums Pond State Park	316,253	71,726	\$7,323,283	1.9%	4
Killens Pond State Park	260,959	93,698	\$6,548,569	1.7%	5
Bellevue State Park	351,235	30,230	\$4,236,074	1.1%	6
Trap Pond State Park	116,626	51,050	\$3,512,408	0.9%	7
White Clay Creek State Park	175,076	15,068	\$2,111,508	0.5%	8
Brandywine Creek State Park	129,006	11,103	\$1,555,877	0.4%	9
Alapocas Run State Park	109,229	9,401	\$1,317,356	0.3%	10
Brandywine Zoo	97,686	8,408	\$1,178,060	0.3%	11
First State Heritage Park at Dover	18,878	1,625	\$227,662	0.1%	12
Fort Delaware State Park	14,128	1,216	\$170,379	0.0%	13
Holts Landing State Park	8,592	739	\$103,621	0.0%	14
Fort DuPont State Park	5,485	472	\$66,148	0.0%	15
Auburn Heights Preserve	3,188	274	\$38,443	0.0%	16
All Camping Parks	3,025,637	1,396,522	\$318,850,159	N/A	N/A
All Day Use Parks	1,145,333	194,445	\$71,037,456	N/A	N/A
All State Parks	4,170,969	1,590,967	\$389,887,614	N/A	N/A





Lums Pond-Initiated Main Purpose Visitor Spending by Category

Lums Pond-Initiated Ancillary Visitor Spend



Source: Rockport Analytics, D.K. Shifflet & Associates, Delaware Division of Parks and Recreation

Visitor Spending by Category in Millions \$	
	All Visitors
Food & Beverage	\$2.04
Lodging	\$1.82
Arts & Entertainment	\$1.08
Transportation	\$0.98
Shopping/Other	\$1.41
Total *	\$7.32

- About 65% of Lums Pond overnight visitors were out of town visitors. Of those overnight visitors, an estimated 63% identified Lums Pond as their main trip motivation.
- The average length of stay amongst Lums Pond overnight visitors was 3.5 days. This includes any additional lodging stay around the area of the park.
- Total Lums Pond ancillary visitor spending eclipsed \$7 million with 53% being spent on lodging and F&B. On average, Lums Pond visitors spent \$102 per person.





Lums Pond Economic Impact Summary

Metric	Direct	Indirect	Induced	Total
Total Main Purpose Visitor Volume				104,401
Total Main Purpose Ancillary Visitor Spending				\$7,323,283
Total Lums Pond Operations Spending				\$295,516
Total Lums Pond Capital Spending				\$2,544,799
Total Lums Pond-Initiated Spending				\$10,163,599
Economic Impact (GDP)	\$6,269,543	\$1,289,847	\$2,080,179	\$9,639,568
Wages Paid	\$4,260,409	\$761,952	\$1,119,468	\$6,141,829
Jobs Supported	134	14	24	172
Tax Receipts				\$2,458,155
Federal				\$1,243,327
State & Local				\$1,214,828

Impact Definitions

Direct: These impacts represent the value added (GDP) of those Delaware businesses that interact directly, or “touch”, the DSP visitor.

Indirect: These impacts represents the benefit to Delaware suppliers to those direct businesses. This would include, for example, local based food suppliers to restaurants.

Induced: These impacts are derived from the local spending of DSP-initiated wages.



FY2016 Lums Pond-Initiated Tax Revenue

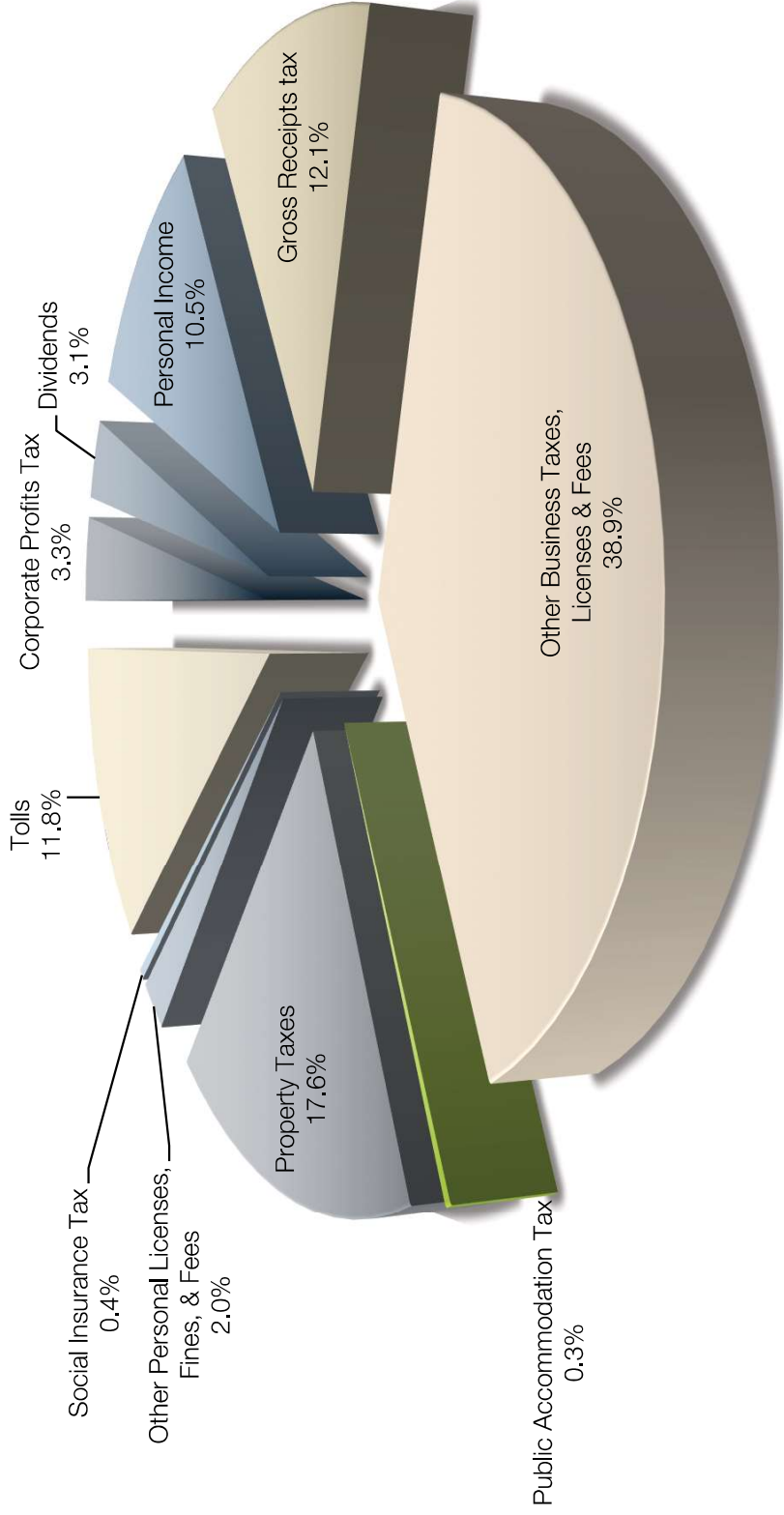
	<i>In thousands of dollars</i>	
	Receipts	% Total
Federal Government	\$1,243.3	100%
Corporate Taxes	\$241.8	19%
Personal Income Tax	\$333.2	27%
Social Insurance Tax	\$668.3	54%
State/Local Government	\$1,214.8	100%
Corporate Profits Tax	\$40.0	3%
Dividends	\$37.1	3%
Personal Income	\$128.0	11%
Gross Receipts Taxes	\$147.1	12%
Other Business Taxes, Licenses & Fees	\$472.6	39%
Public Accommodation Tax	\$4.1	0.3%
Property Taxes	\$213.3	18%
Other Personal Licenses, Fines, & Fees	\$24.4	2%
Social Insurance Tax	\$4.8	0%
Tolls	\$143.5	12%
Grand Total	\$2,458.2	100%

Lums Pond Activity Contributed Significantly to Federal, State and Local Governments

- Lums Pond-initiated total tax receipts reached \$2.5 million in FY2016, \$1.2 million of which went to Federal coffers with another \$1.2 million supporting state and municipal governments around the state.
- About 39% (\$472k) of state collections were comprised of other business taxes, licenses and fees. Tolls added another 12% of the total and property taxes 18% of the total.
- Transactional taxes also provided substantial income for the state which collected an estimated \$147.1k in gross receipts taxes and \$4.1k in lodging taxes from state park visitors.



FY2016 Lums Pond State Park State & Local Tourism Tax Sources Total = \$1.2 million



Source: Rockport Analytics, IMPLAN, Delaware Department of Revenue & Transportation



Trap Pond State Park

Visitor Performance, Spending &
Economic Impact



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Trap Pond Economic Impact Headlines

✓ **51,050**

Trap Pond Main Purpose Visitors

✓ **\$3.8 million**

Trap Pond-Initiated Incremental Local Spending

✓ **73**

Full and Part Time area Jobs Supported

✓ **\$2.3 million**

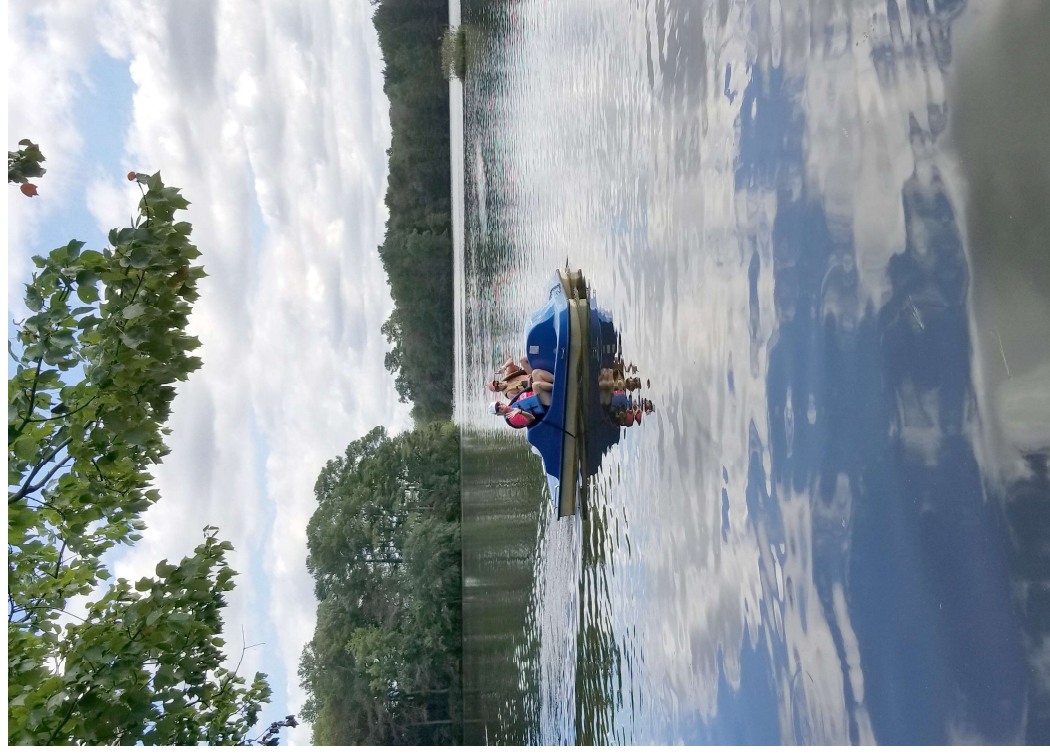
Paid Wages to Trap Pond- Supported Jobs

✓ **\$526,000**

Trap Pond-Initiated State & Local Taxes

✓ **\$3.8 million**

Total Economic Impact (Value Added)



Source: Rockport Analytics, IMPLAN, Smith Travel Research, DSP Financial Statements, DKSA



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ANALYTICS

Trap Pond is Ranked 7th in Visitor Spend Among the State's 16 Parks

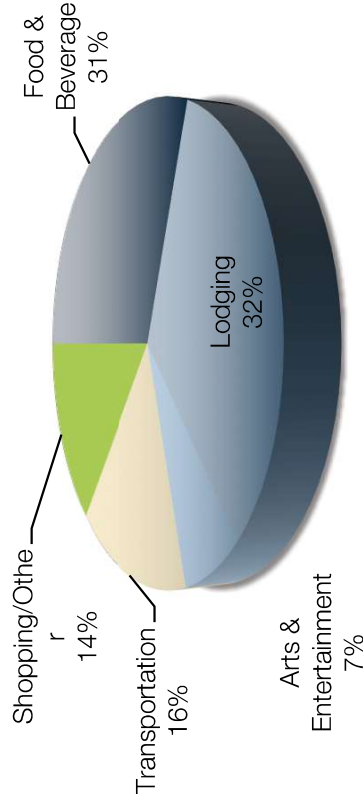
Delaware State Parks Visitation & Visitor Spending FY 2016/2017

	Total Park Attendance	Park Visitors*	Visitor Spending	Share of Total Spending	Spending Rank
Delaware Seashore State Park & Indian River Marina	1,055,759	588,906	\$172,984,023	44.4%	1
Cape Henlopen State Park	1,276,040	591,141	\$128,481,875	33.0%	2
Fenwick Island State Park	232,832	115,909	\$60,032,326	15.4%	3
Lums Pond State Park	316,253	71,726	\$7,323,283	1.9%	4
Killens Pond State Park	260,959	93,698	\$6,548,569	1.7%	5
Bellevue State Park	351,235	30,230	\$4,236,074	1.1%	6
Trap Pond State Park	116,626	51,050	\$3,512,408	0.9%	7
White Clay Creek State Park	175,076	15,068	\$2,111,508	0.5%	8
Brandywine Creek State Park	129,006	11,103	\$1,555,877	0.4%	9
Alapocas Run State Park	109,229	9,401	\$1,317,356	0.3%	10
Brandywine Zoo	97,686	8,408	\$1,178,060	0.3%	11
First State Heritage Park at Dover	18,878	1,625	\$227,662	0.1%	12
Fort Delaware State Park	14,128	1,216	\$170,379	0.0%	13
Holts Landing State Park	8,592	739	\$103,621	0.0%	14
Fort DuPont State Park	5,485	472	\$66,148	0.0%	15
Auburn Heights Preserve	3,188	274	\$38,443	0.0%	16
All Camping Parks	3,025,637	1,396,522	\$318,850,159	N/A	N/A
All Day Use Parks	1,145,333	194,445	\$71,037,456	N/A	N/A
All State Parks	4,170,969	1,590,967	\$389,887,614	N/A	N/A



Trap Pond-Initiated Main Purpose Visitor Spending by Category

Trap Pond-Initiated Ancillary Visitor Spend



Visitor Spending by Category in Millions \$	
	All Visitors
Food & Beverage	\$1.07
Lodging	\$1.13
Arts & Entertainment	\$0.25
Transportation	\$0.56
Shopping/Other	\$0.51
Total *	\$3.51

Source: Rockport Analytics, D.K. Shifflet & Associates, Delaware Division of Parks and Recreation

- About 84% of Trap Pond overnight visitors were out of town visitors. Of those overnight visitors, an estimated 73% identified Trap Pond as their main trip motivation.
- The average length of stay amongst Trap Pond overnight visitors was 3.6 days. This includes any additional lodging stay around the area of the park.
- Total Trap Pond ancillary visitor spending reached \$3.5 million with 63% being spent on lodging and F&B. On average, Trap Pond visitors spent \$69 per person.



Trap Pond Economic Impact Summary

Metric	Direct	Indirect	Induced	Total
Total Main Purpose Visitor Volume				78,425
Total Main Purpose Ancillary Visitor Spending				\$3,512,408
Total Trap Pond Operations Spending				\$323,149
Total Trap Pond Capital Spending				\$7,000
Total Trap Pond-Initiated Spending				
Economic Impact (GDP)	\$2,526,558	\$487,321	\$789,621	\$3,820,858
Wages Paid	\$1,627,141	\$282,467	\$424,994	\$2,345,034
Jobs Supported	58	5	9	73
Tax Receipts				
Federal				\$1,014,324
State & Local				\$487,915
				\$526,409

Impact Definitions

Direct: These impacts represent the value added (GDP) of those Delaware businesses that interact directly, or “touch”, the DSP visitor.

Indirect: These impacts represents the benefit to Delaware suppliers to those direct businesses. This would include, for example, local based food suppliers to restaurants.

Induced: These impacts are derived from the local spending of DSP-initiated wages.



FY2016 Trap Pond-Initiated Tax Revenue

<i>In thousands of dollars</i>		
	Receipts	% Total
Federal Government	\$487.9	100%
Corporate Taxes	\$104.2	21%
Personal Income Tax	\$127.0	26%
Social Insurance Tax	\$256.7	53%
State/Local Government	\$526.4	100%
Corporate Profits Tax	\$16.5	3%
Dividends	\$15.3	3%
Personal Income	\$48.8	9%
Gross Receipts Taxes	\$65.2	12%
Other Business Taxes, Licenses & Fees	\$170.4	32%
Public Accommodation Tax	\$2.5	0.5%
Property Taxes	\$94.5	18%
Other Personal Licenses, Fines, & Fees	\$9.3	2%
Social Insurance Tax	\$1.9	0%
Tolls	\$102.1	19%
Grand Total	\$1,014.3	100%

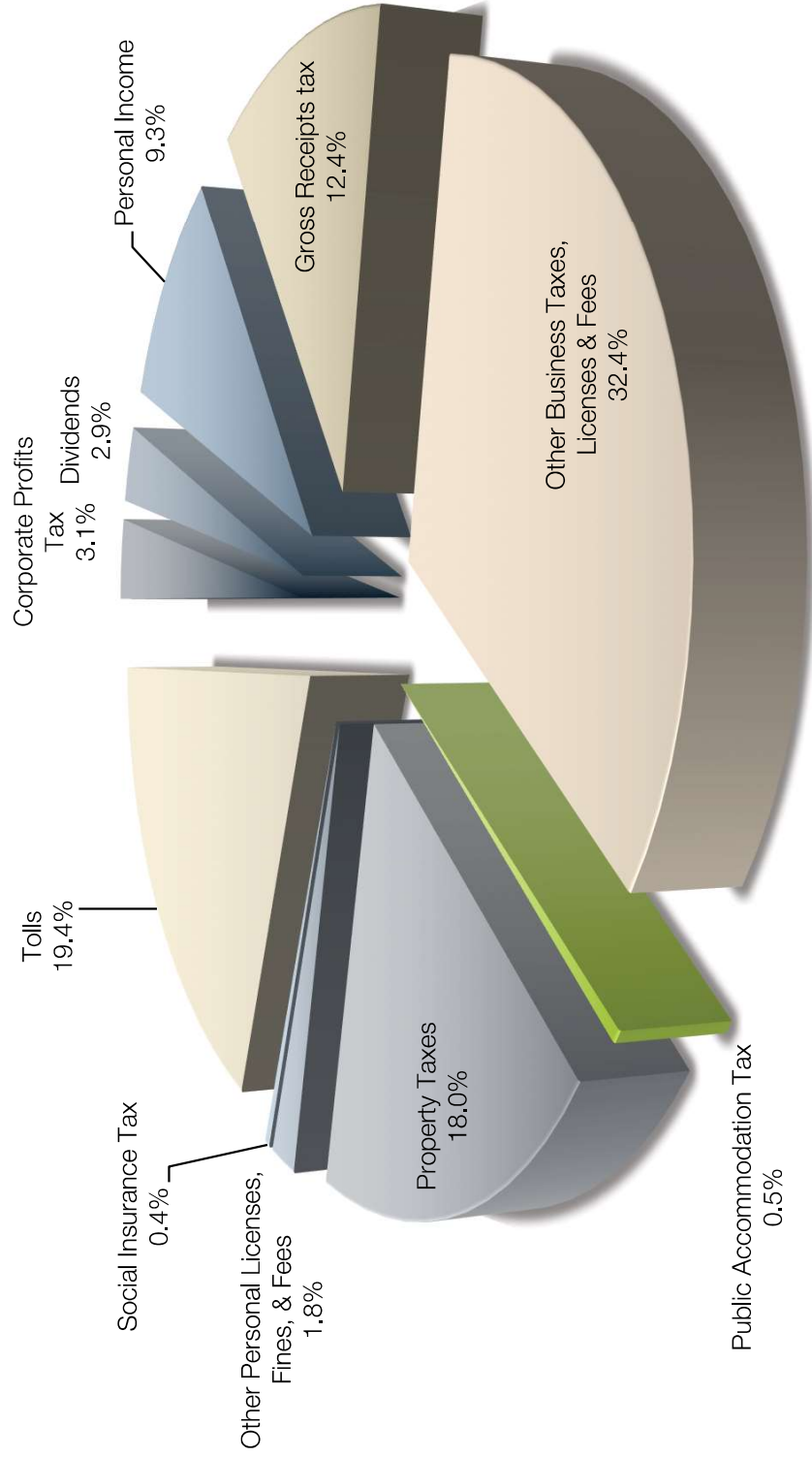
Trap Pond Activity Contributed Significantly to Federal, State and Local Governments

- Trap Pond-initiated total tax receipts eclipsed \$1 million in FY2016, \$488k of which went to Federal coffers and \$526k to state and municipal governments around the state.
- About 32% (\$170.4k) of state collections were comprised of other business taxes, licenses and fees. Tolls added another 19% of the total and property taxes 18% of the total.
- Transactional taxes also provided substantial income for the state which collected an estimated \$65.2k in gross receipts taxes and \$2.5 in lodging taxes from state park visitors.



FY2016 Trap Pond State Park State & Local Tourism Tax Sources

Total = \$526 thousand



Source: Rockport Analytics, IMPLAN, Delaware Department of Revenue & Transportation





Methodology: Economic Impact of DSP System to Delaware

Task	Methodology/Approach	Data Sources
<p>Estimate DSP FY2016 Attendance, Visitation, Initiated Visitation</p>	<p>Attendance projections were supplied by the DSP system. They covered the 16 Delaware state parks. Rockport fielded a state park visitor survey to identify primary trip visitors and to also measure how far state park visitors traveled—visitors were those attendees that came from beyond 50 miles from the site. Data from DKSA’s national travel panel covering Delaware visitors and their trip motivations was used to reconcile total visitor data collected in the survey effort.</p>	<ul style="list-style-type: none"> DSP D.K. Shifflet & Associates Rockport Analytics DSP site visitor registrations
<p>Supplement Online Survey Data</p>	<p>It was determined after conducting a our data analysis of the online survey data collected that we needed to collect additional data to cover missing segments of the park visitor population. Park staff fielded a survey developed by Rockport Analytics at 6 key parks. The 6 parks and sample sizes for the supplemental data collection were as follows: Delaware Seashore (n = 152), Cape Henlopen (n = 76), Killens Pond (n = 25), Lums Pond (n = 62), Fenwick Island (n = 50) Wilmington State Parks & Zoo (n = 34).</p>	<ul style="list-style-type: none"> DSP Rockport Analytics
<p>Estimate DSP-initiated Non-Resident Visitor Spending</p>	<p>Data collected from both survey efforts was used to establish estimates of main purpose visitors to each park and ancillary visitor spending per park. These data were then triangulated with DKSA spending to arrive at final estimates of DSP-motivated visitor spending. DSP ticket revenues were subtracted from this spending to avoid the possibility of double counting.</p>	<ul style="list-style-type: none"> Bureau of Economic Analysis Smith Travel Research Delaware Tourism Office D.K. Shifflet & Associates US Census Bureau, BLS Rockport Analytics



Methodology: Economic Impact of DSP System to Delaware (continued)

Task	Methodology/Approach	Data Sources
<p>Estimate DSP Operations & Capital Spending</p>	<p>Operating revenue, costs, and capital spending was supplied by DSP. Revenue was used only to reduce visitor spending in the entertainment category as described above. Careful attention was used to avoid double counting. Operating and capex expenditures are another important contribution of the DSP.</p>	<ul style="list-style-type: none"> • DSP • Rockport Analytics
<p>Translate spending into economic impact on Delaware on local markets</p>	<p>Spending streams for visitors and operations by detailed category are inputted into the latest (2016) IMPLAN economic models for the Delaware and its counties. Contributions to GDP, jobs, wages, and taxes are estimated by the model. IMPLAN is a non-proprietary model of the regional economy that is widely used by to assess the economic impact of public and private investments.</p>	<ul style="list-style-type: none"> • IMPLAN (www.implan.com)
<p>Calculate Delaware state & local taxes generated by the DSP system</p>	<p>Taxes directly applicable to visitor & operational transactions are calculated using the categorical spending described above against appropriate current tax rates less any exemptions.</p>	<ul style="list-style-type: none"> • Delaware Department of Revenue • Delaware tourism taxes & rates • Other local tax authorities • Rockport Analytics





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