

The Economic Impact of Visitation to Anne Arundel County & Annapolis, MD

EXECUTIVE SUMMARY

The Contribution of Travel & Tourism to the
Anne Arundel County Economy in 2018

JANUARY 2020



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Study Overview

ABOUT THE STUDY

Visit Annapolis & Anne Arundel County (VAAAC) contracted Rockport Analytics to study the economic impact of tourism in Annapolis and Anne Arundel County. The goal of the study was to measure and analyze the full economic contribution that visitors make to the Anne Arundel County economy. The study covered the 2017-18 calendar years with a focus on 2018 and the changes in tourism performance between 2017 and 2018. The analysis seeks to translate the contribution made by visitors to Anne Arundel County and Annapolis GDP, jobs, wages, and tax receipts.

FOR THE ENTIRE 2018 TOURISM

ECONOMIC IMPACT REPORT,

PLEASE VISIT

www.vaaac.org/reports

Methodology

The spending and associated impacts estimated at the county level include both in-state and out-of-state visitation. A visitor is defined as anyone traveling over 50 miles one way for either business or leisure purposes and includes both day trips and overnight stays.

Visitor volume and spending were estimated using a number of sources including DK Shifflet & Associates Directions syndicated traveler program and mobile location data from UberMedia. These data sources were then reconciled with Bureau of Labor Statistics (BLS) reported employment data, BEA reported Earnings and Employment, reported tax receipts from Anne Arundel County Office of Finance and the Maryland Comptroller, and other secondary sources such as STR, AirDNA and Dun & Bradstreet.

An economic model of Anne Arundel County is also critical to estimating how traveler spending resounds through the state and county-level economies. Rockport Analytics has chosen the IMPLAN model for Anne Arundel County (www.implan.com), a non-proprietary economic model that has become the standard for most economic impact assessments in the United States. This model is critical to measuring the direct, indirect, and induced impacts of visitation to the state.





Visitation

Visitation to Anne Arundel County reached

6.3 MILLION VISITORS

in 2018, an increase of 3.3% vs 2017.

ANNAPOLIS WELCOMED 2.2 MILLION VISITORS.

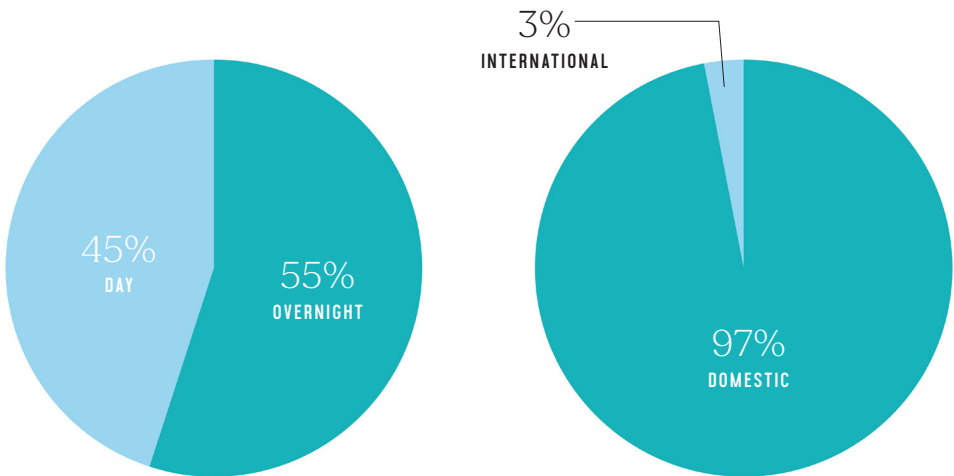
TOP-10 ORIGIN STATES

	Estimated Number of Visitors
Virginia	1,230,006
Pennsylvania	662,100
Washington, D.C.	521,985
New York	456,210
Florida	376,496
New Jersey	310,100
North Carolina	268,655
Texas	227,855
California	175,216
Georgia	161,640

Key Segments

Overnight trip volume increased to nearly 3.4 million in 2018, 3.5% higher than 2017.

SHARE OF ANNE ARUNDEL COUNTY VISITORS



The number of international visitors grew by 3.5% from 2017, outperforming the 3.2% growth in domestic visitor volume. International visitors spent about **\$745 per trip** in 2018



Tourism & Impact

Of the \$1.5 billion in visitor spending, nearly \$1.2 billion was retained in the Anne Arundel County economy, providing an array of businesses with revenue, supporting jobs for county citizens, and producing revenue for state and local governments.

\$483.7 — 32%

SHOPPING / RETAIL / OTHER

\$324.6 — 21%

LODGING

\$250.8 — 16%

ENTERTAINMENT & REC.

\$245.1 — 16%

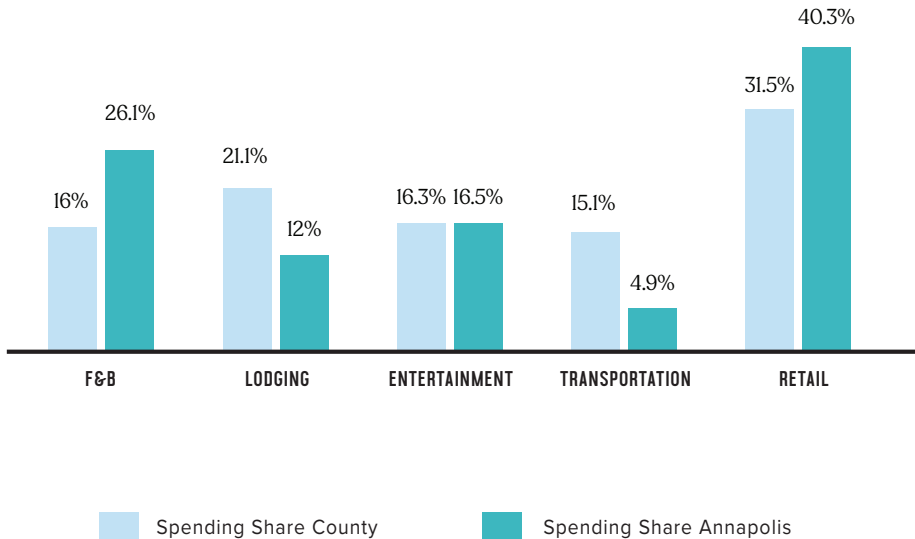
FOOD & BEVERAGE

\$232.0 — 15%

TRANSPORTATION

One-Third of Anne Arundel County
Visitor Spending Occurred In Annapolis
at \$513 Million in 2018 Visitors spent
an average of \$234 per person.

SPENDING BY CATEGORY AS A PERCENT OF TOTAL SPENDING



Tourism & Impact

**\$1.5 BILLION
VISITOR SPENDING**

=

**\$1.2 BILLION IN TOTAL
ECONOMIC IMPACT**

Tourism's 2018 contribution to Anne Arundel
County Gross Domestic Product (GDP) grew by
3.3% from a 2017 value of \$1.1 billion.

Jobs

Tourism supported more than

17,370 JOBS

for residents throughout Anne Arundel County.

This represents an increase of 2.4%
over 2017, outperforming the
2.2% growth in total county
employment over the same period.

Visitor spending generated
\$435 million in direct wages
to Anne Arundel County employees.



How Do Visitors Benefit

ANNE ARUNDEL COUNTY?

LESS TAXES PER HOUSEHOLD

In the absence of tourism in Anne Arundel County, every household would need to contribute an additional

\$955 IN TAXES



How Do Visitors Benefit

ANNE ARUNDEL COUNTY?

MORE JOBS

Tourism is Anne Arundel County's
13th largest employer, supporting

3% OF ALL JOBS

in the county.

A photograph of a white sign with black text that reads "NOW HIRING". The sign is mounted on two black metal stakes and is placed on a green lawn. In the background, there is a paved road, some trees, and a clear blue sky. To the right of the sign, there is a dark, vertical object, possibly a mailbox or a post.

**NOW
HIRING**

How Do Visitors Benefit

ANNE ARUNDEL COUNTY?

STUDENT EDUCATION

Tourism-supported tax collections helped to educate

**14,350 PUBLIC
SCHOOL STUDENTS**



How Do Visitors Benefit

ANNE ARUNDEL COUNTY?

MORE TEACHERS

Tourism-supported tax collections paid the salaries of

**4,270 PUBLIC
SCHOOL TEACHERS**



How Do Visitors Benefit

ANNE ARUNDEL COUNTY?

MORE LAW ENFORCEMENT

Tourism-supported tax collections
can pay for starting salaries for

**4,190 LAW
ENFORCEMENT AGENTS**



How Do Visitors Benefit

ANNE ARUNDEL COUNTY?

MORE FIREFIGHTERS

Tourism-supported tax collections
can pay for starting salaries for

4,970 FIREFIGHTERS

in the county.



FOR THE ENTIRE 2018 ECONOMIC

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