



Report Commissioned by the
Indiana Destination Development
Corporation



ROCKPORT
ANALYTICS

2023 ECONOMIC CONTRIBUTION OF TOURISM IN BROWN COUNTY

Key Metrics and Economic Impact Assessment

January 2025

Key Inputs & Data Tools



Indiana Destination Development Corporation

2023 Tourism Economic Impact Study
Tourism Support/Promotional Spending
<https://www.in.gov/iddc/>



Longwoods International

Visitor Volume & Spending
Panel survey of 600,000 households per year
<http://www.longwoods-intl.com/>



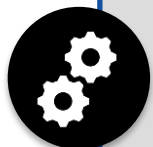
Government Sources

Bureau of Labor Statistics
Bureau of Economic Analysis
IN Gaming Commission
Indiana Office of Fiscal & Management Analysis



Private Data Sources

STR/CoStar



IMPLAN Model

Local economic model (Brown County)
Defacto standard for most economic impact work
www.implan.com

Study Overview & Methodology

Study Overview

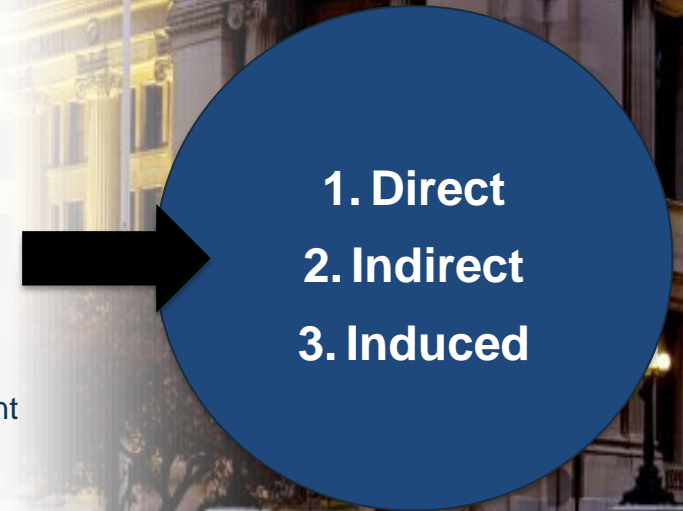
In 2016, the Indiana Office of Tourism Development (now part of the Indiana Destination Development Corporation) partnered with Tourism Tomorrow to create a research group that could conduct county-level tourism studies. This group brings together top tourism and economic experts to ensure consistent research methods and best practices across Indiana. The 2023 Economic Impact Study of Tourism in Brown County was carried out by Rockport Analytics, an independent research firm.

Methodology

The study measures tourism's economic impact in three ways:

1. **Direct Impact:** The value created by businesses directly serving visitors, such as hotels and restaurants.
2. **Indirect Impact:** Benefits to local suppliers supporting those businesses, like local food suppliers to restaurants.
3. **Induced Impact:** Wages earned from tourism-related jobs, which are spent locally on goods and services.

The results are based on traveler spending reported in the 2023 Indiana Tourism Study, combined with additional data from sources like Longwoods International, Reach Market Planning, and international tourism data. This information is cross-checked with employment and earnings data from the Bureau of Labor Statistics (BLS) and the Bureau of Economic Analysis (BEA), as well as local tax collections, to ensure accurate county-level results.

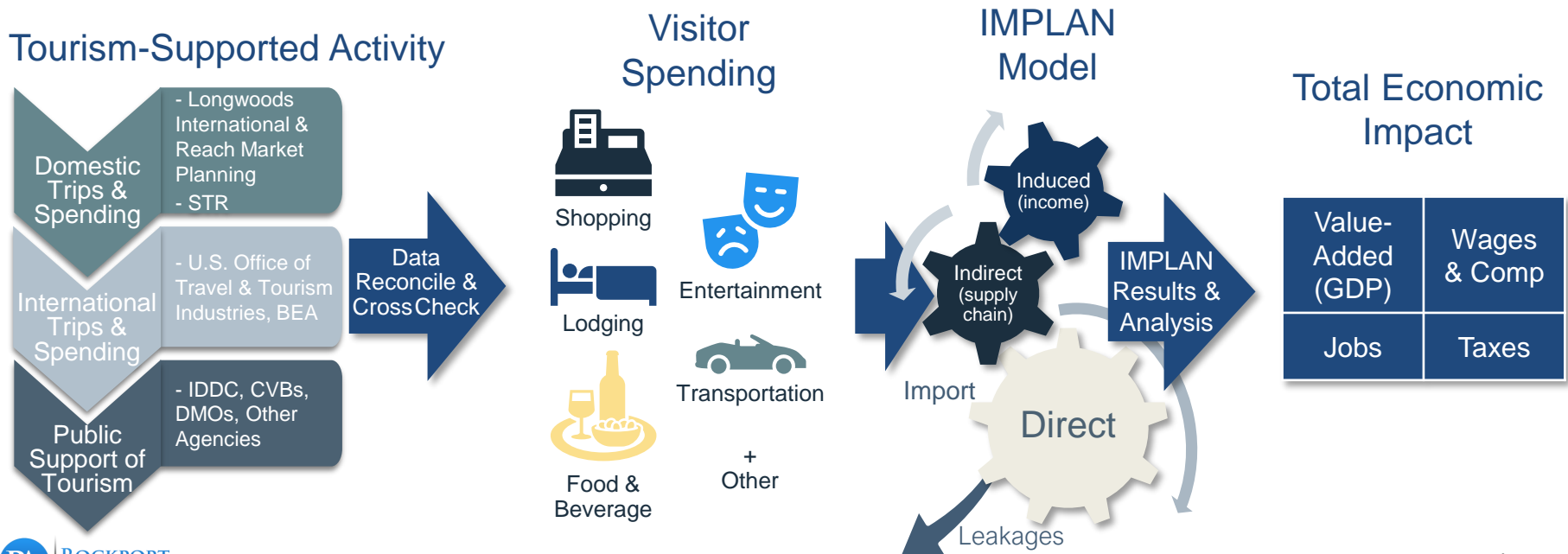


Study Overview & Methodology

Methodology (continued)

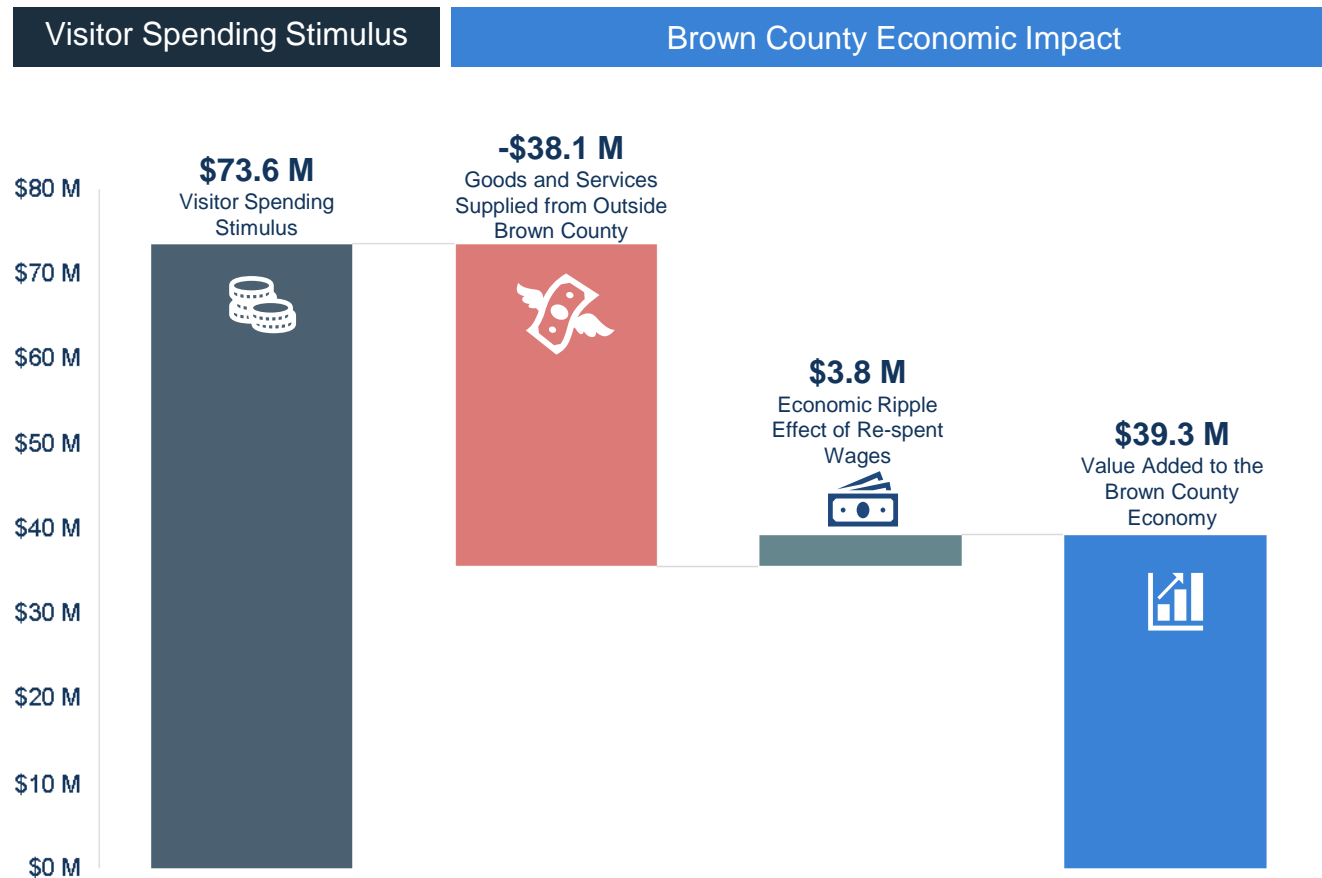
An economic model of Indiana is essential for understanding how traveler spending impacts the state and county economies. Rockport Analytics uses the IMPLAN model (www.implan.com), a widely used tool for economic impact assessments in the U.S. This model measures the direct, indirect, and induced effects of visitor spending.

IMPLAN also tracks how much of each tourism dollar stays in the local economy. While total traveler spending often surpasses direct tourism impact, not all purchased goods and services come from local suppliers. The model accounts for these "leakages" to suppliers outside the county, preventing overestimation of economic impact — a common issue in many studies. Counties with more diverse economies experience fewer leakages, resulting in higher local retention and a stronger visitor spending multiplier.



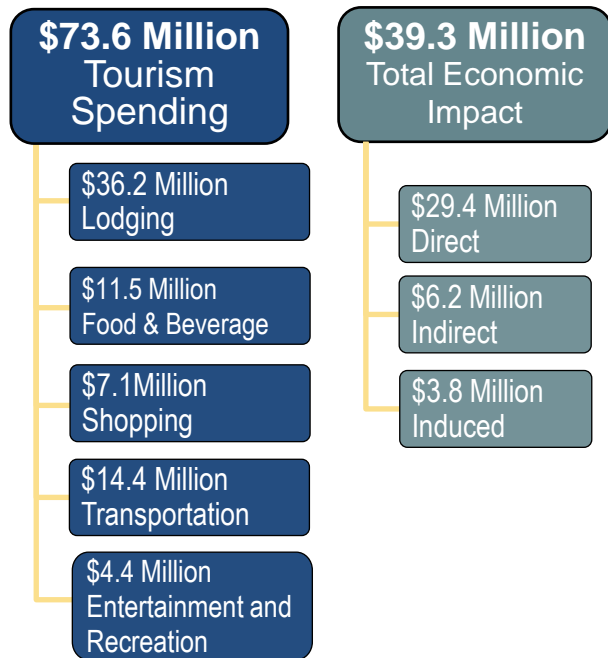
Brown County Tourism Generated \$39.3 Million in GDP in 2023

Visitors to Brown County spent \$73.6 million on various goods and services in the state. This spending stimulus generated \$39.3 million in net new value added to the Brown County economy.



2023 Brown County Tourism Highlights

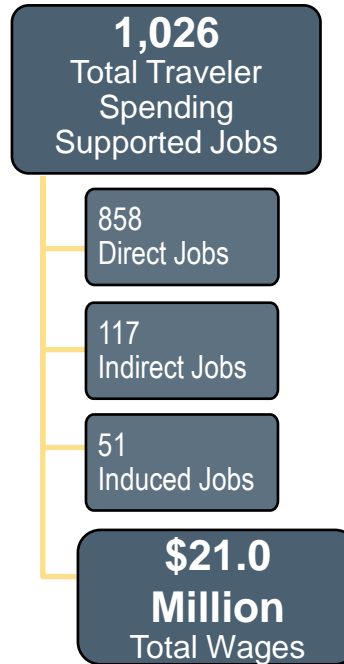
Tourism and Impact



Tourism spending is considered an export from the local area since visitors bring monies from outside and spend locally. Unlike other local industries, Tourism cannot be "offshored".

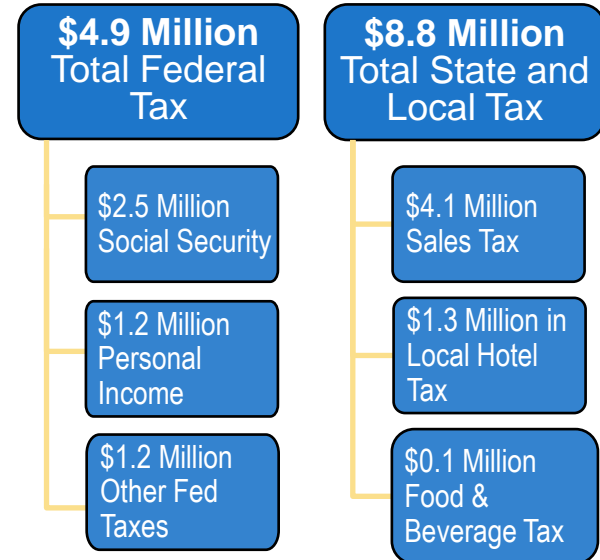
For every dollar spent by Brown County visitors in 2023, **53 cents** 'stayed' local and contributed directly to the gross county product of Brown County. This includes impact on the **direct** (tourism-oriented), **indirect** (supply chain) and **induced** (income) industries. The remaining **47 cents** of every dollar is 'leaked' to the supply chain outside of Brown County.

Jobs and Wages



Every **\$71,715** spent by people visiting Brown County in 2023 supported a job, resulting in an average of **\$20,479** in gross wages. This includes jobs in the industries directly supporting the visitor such as the arts and retail trade but also in supply chain sectors like transportation. The income of direct and indirect workers also goes to support industries like arts, retail trade, and transportation.

Tax Revenue Generated



For every **\$1.00** spent by Brown County visitors in 2023, **7 cents** goes to federal taxes and **12 cents** goes to state and local taxes. Federal tax collections include corporate & personal income taxes, excise taxes and social security collections. State and local tourism-derived taxes include sales taxes, property taxes and lodging taxes.

Brown County Tourism

Brown County, Indiana, ranked 37th out of 92 counties in overall visitor spending, with over \$73 million in annual spending and a per capita tourism sales figure of \$4,702.50. Tourism spending grew 9.7% in 2023, placing it 17th among 92 counties in growth rankings.



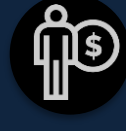
Spending by Visitors

\$73.6 M



Spending Growth

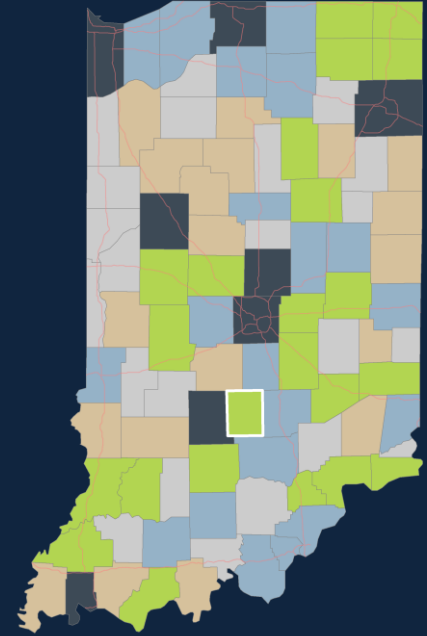
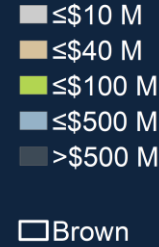
9.7%



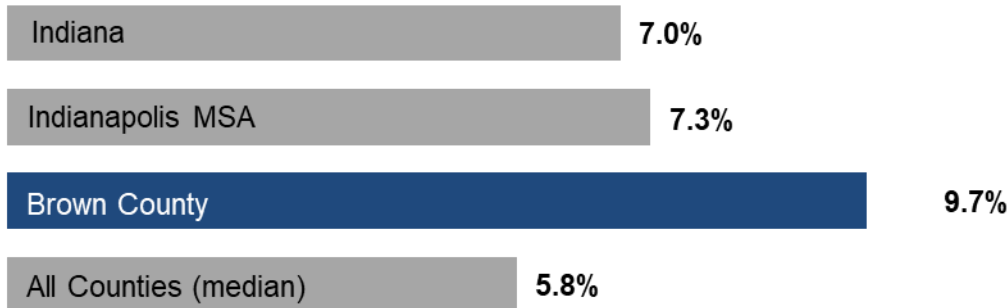
Sales / Capita

\$4,702.50

2023 Tourism Spending by County



Annual Growth by Spending by Region



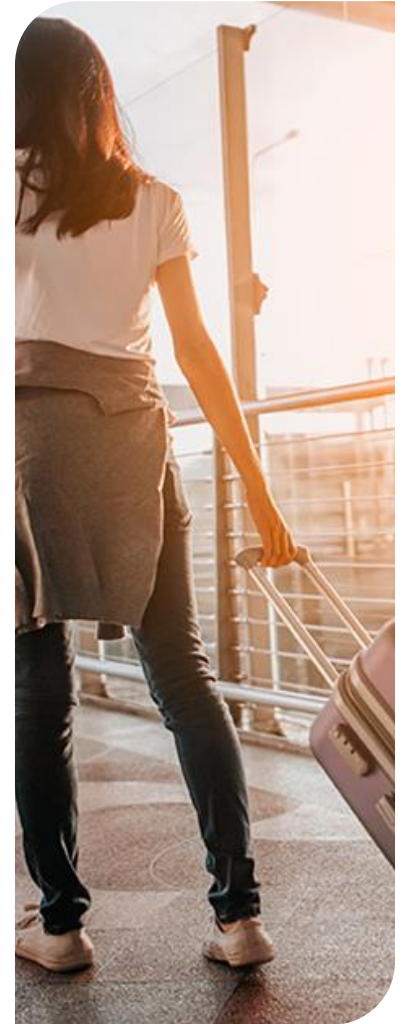
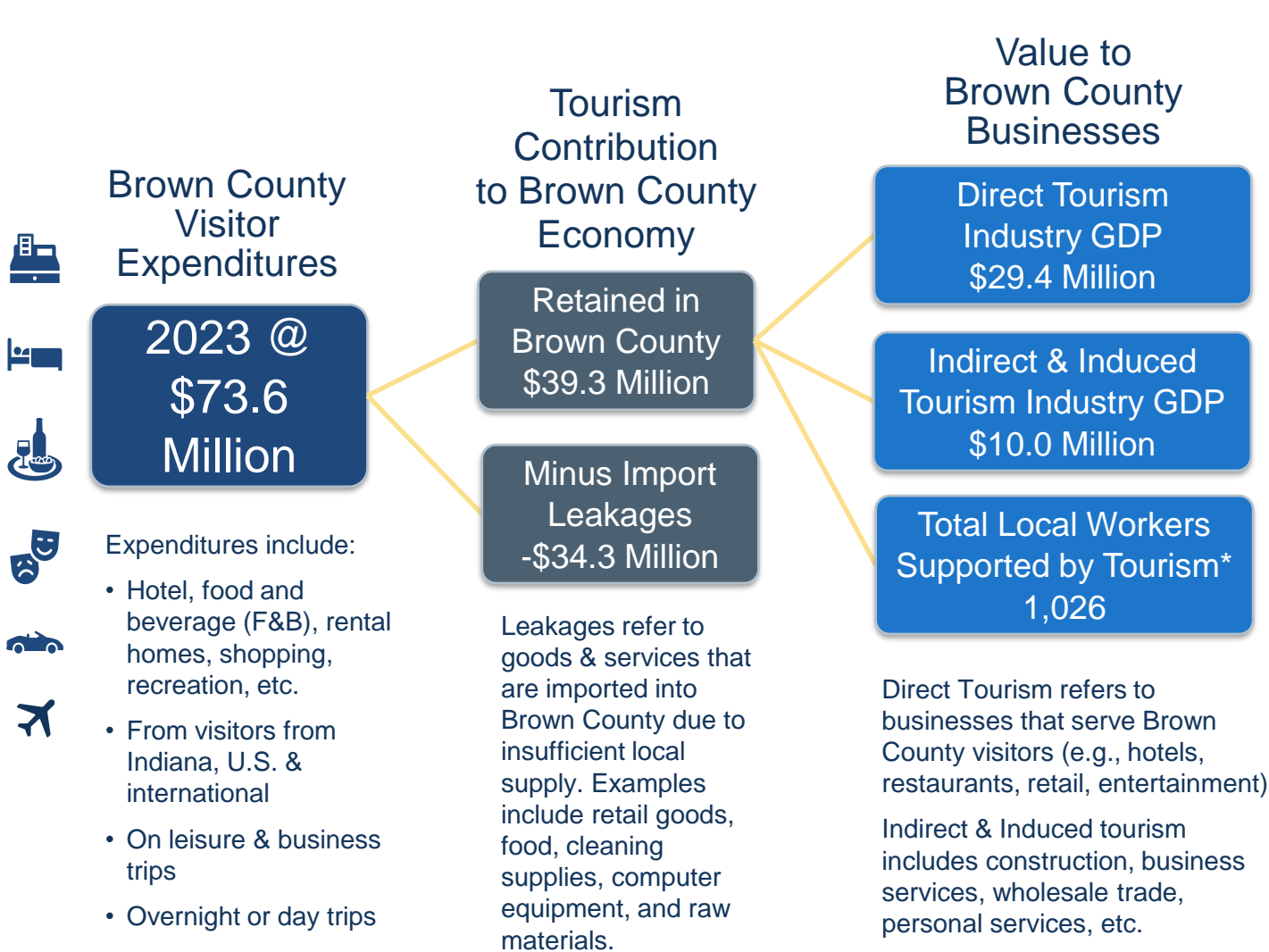
Tourism Spend / Capita
Ranking
#4 / 92



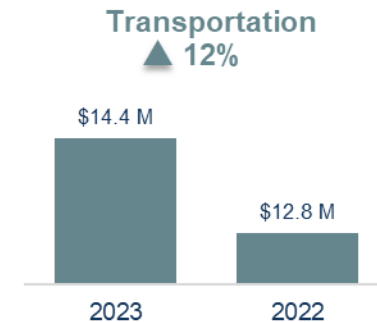
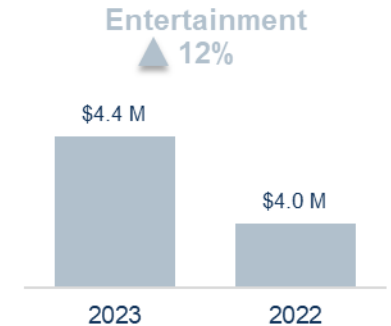
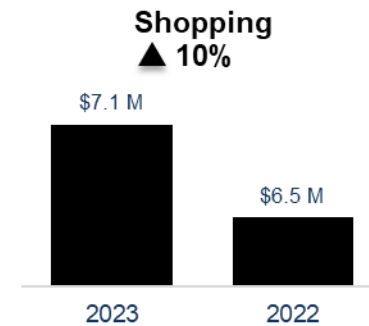
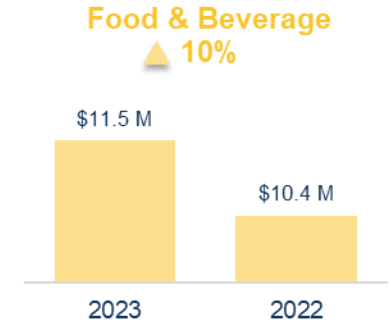
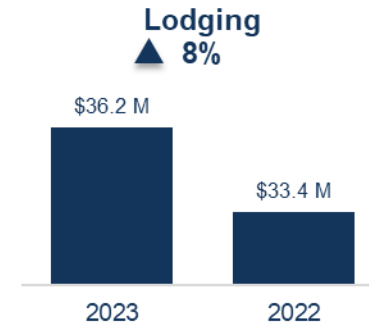
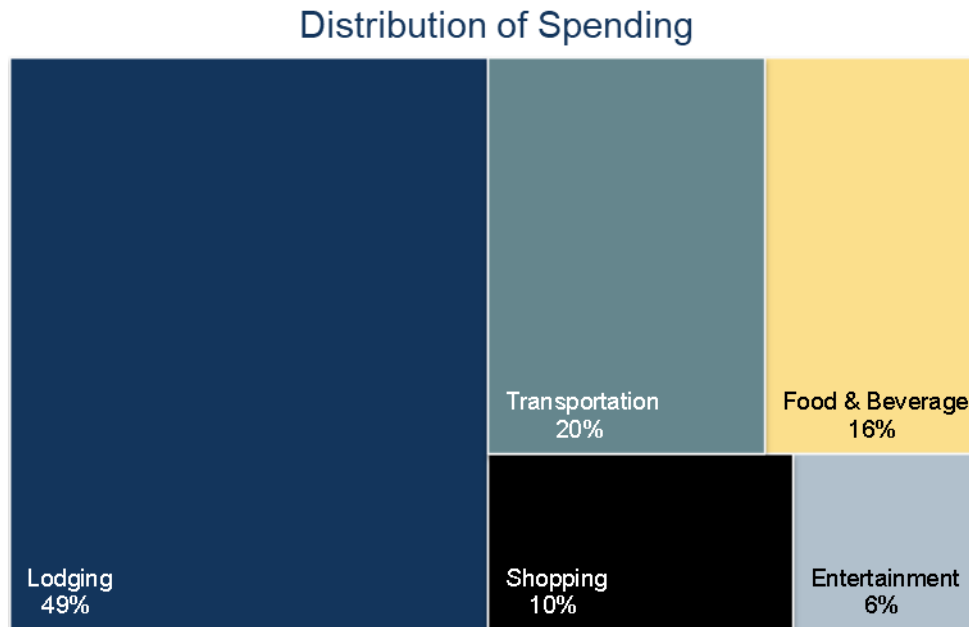
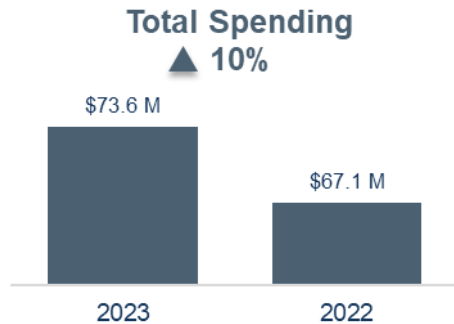
Tourism Growth
Ranking
#17 / 92



The Progression of Tourism Spending in Brown County's Economy



Visitor Spending by Category



Source: Longwoods International, NTTO, Reach Market Planning, STR, BTS, AirDNA, Rockport Analytics

Tourism's Bottom Line in Brown County

2023 Economic Contribution Summary (Compared to 2022)

2023 Metric	Direct	Indirect	Induced	Total
Total Spending				\$73,608,247
2023 Y/Y Growth				9.7%
Economic Impact (GDP)	\$29,364,202	\$6,184,237	\$3,770,710	\$39,319,150
2023 Y/Y Growth	9.4%	9.0%	9.5%	9.4%
Wages	\$15,790,287	\$3,774,264	\$1,455,134	\$21,019,684
2023 Y/Y Growth	9.6%	9.0%	9.5%	9.5%
Jobs	858	117	51	1,026
2023 Y/Y Growth	8.2%	7.1%	7.6%	8.0%
Tax Receipts				\$13,729,821
2023 Y/Y Growth				9.7%

Source: Rockport Analytics, Longwoods International, STR, BLS, BEA, Indiana Office of Fiscal & Management Analysis, IMPLAN

Impact Glossary

Direct: These impacts represent the value added of those sectors that interact directly, or “touch”, the visitor.

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

Induced: These impacts are derived from tourism-generated wages as they are spent throughout the local economy.

Tourism Supports Many Local Industries

Brown County Tourism: 2023 Economic Impact (Value Added/GDP in thousands)

Industry (NAICS)*	Direct	Indirect	Induced	Total
Accommodations	\$14,388	\$23	\$11	\$14,422
Transportation & Warehousing	\$6,369	\$69	\$28	\$6,466
Food Services & Drinking Places	\$5,144	\$516	\$290	\$5,950
Real Estate & Rental	\$0	\$658	\$1,389	\$2,047
Retail Trade	\$1,563	\$51	\$430	\$2,045
Arts, Entertainment & Rec	\$1,900	\$30	\$108	\$2,038
Professional Services	\$0	\$1,153	\$185	\$1,337
Administrative & Waste Services	\$0	\$884	\$71	\$955
Government	\$0	\$714	\$98	\$812
Other Services	\$0	\$478	\$231	\$709
Finance & Insurance	\$0	\$407	\$230	\$637
Construction	\$0	\$361	\$47	\$408
Manufacturing	\$0	\$299	\$39	\$338
Wholesale Trade	\$0	\$127	\$175	\$302
Information	\$0	\$237	\$57	\$294
Health & Social Services	\$0	\$0	\$290	\$290
Utilities	\$0	\$99	\$31	\$131
Management of Companies	\$0	\$54	\$2	\$56
Educational Services	\$0	\$4	\$34	\$38
Ag, Forestry, Fish & Hunting	\$0	\$20	\$13	\$33
Mining	\$0	\$0	\$0	\$1
Total - 2023	\$29,364	\$6,184	\$3,771	\$39,319
Total - 2022	\$26,836	\$5,673	\$3,445	\$35,954
% Change	9.4%	9.0%	9.5%	9.4%

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

Tourism Supports Brown County Jobs

Brown County Tourism: 2023 Economic Impact (Employment)

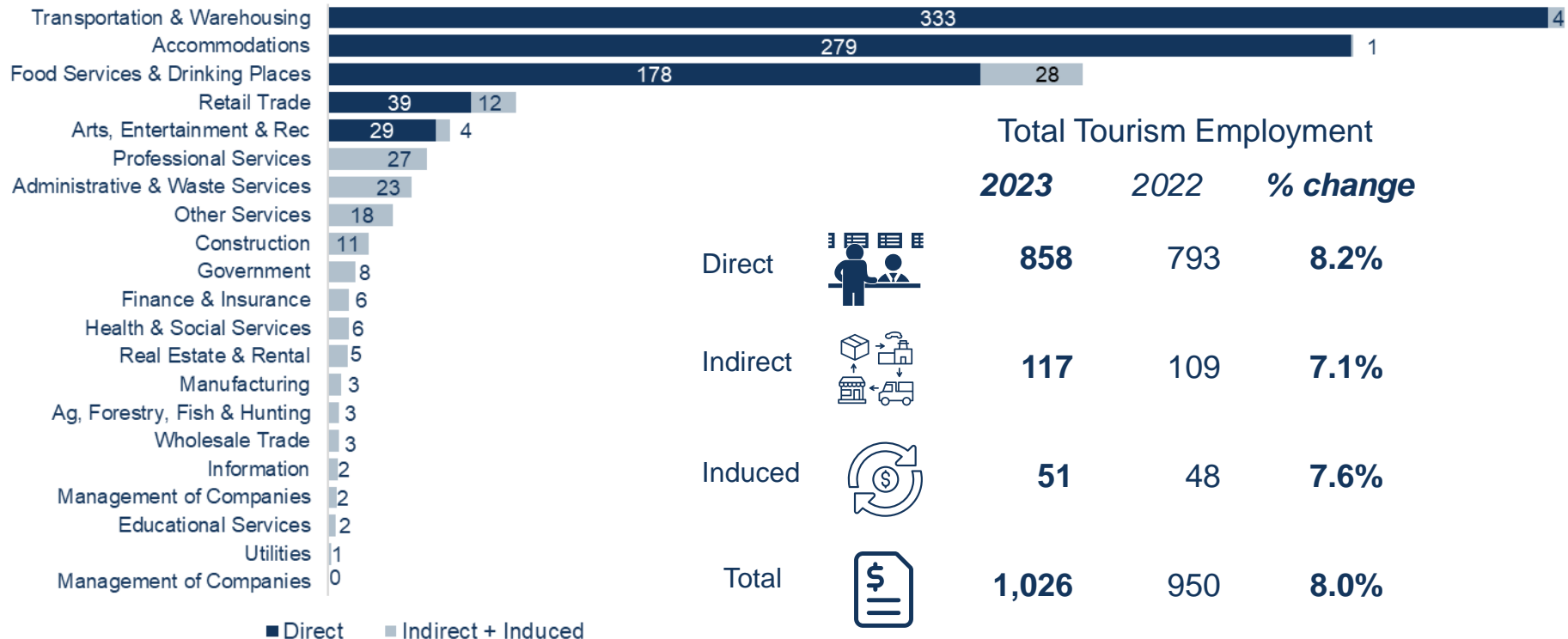
Industry (NAICS)*	Direct	Indirect	Induced	Total
Transportation & Warehousing	333	3	1	337
Accommodations	279	0	0	280
Food Services & Drinking Places	178	18	10	206
Retail Trade	39	1	11	51
Arts, Entertainment & Rec	29	2	2	33
Professional Services	0	24	3	27
Administrative & Waste Services	0	21	2	23
Other Services	0	12	6	18
Construction	0	10	1	11
Government	0	6	1	8
Finance & Insurance	0	4	2	6
Health & Social Services	0	0	6	6
Real Estate & Rental	0	4	2	5
Manufacturing	0	3	1	3
Ag, Forestry, Fish & Hunting	0	2	1	3
Wholesale Trade	0	1	2	3
Information	0	2	0	2
Management of Companies	0	2	0	2
Educational Services	0	0	2	2
Utilities	0	1	0	1
Mining	0	0	0	0
Total - 2023	858	117	51	1,026
Total - 2022	793	109	48	950
% Change	8.2%	7.1%	7.6%	8.0%

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

Tourism Supported Employment – Direct, Indirect, and Induced

Direct employment refers to full- and part-time workers who are employed in the tourism industry by companies that directly serve visitors. Indirect employees work for companies that supply goods and services to direct companies. Induced employment refers to workers supported by the re-spent wages of direct and supply chain employees. In industries that are largely driven by tourism (food services, entertainment, accommodations, etc.), most employees are direct employees.

Brown County Tourism: 2023 Economic Impact (Employment)



Tourism Industry Ranking in Brown County

2023 Tourism in Brown County: Ranking of Major Industries By Total Employment

Rank	Industry	2023 Reported*	2023 Tourism Extracted**	% of Total	2023 % Growth
1	Tourism	-	858	27.4%	8.2%
2	Government	707	707	22.6%	2.8%
3	Retail trade	336	297	9.5%	-2.1%
4	Manufacturing	295	295	9.4%	2.9%
5	Health & Social Services	191	191	6.1%	4.5%
6	Construction	158	158	5.1%	3.5%
7	Professional Services	151	151	4.8%	0.0%
8	Educational Services	145	145	4.6%	8.2%
9	Accommodation & Food Services	567	110	3.5%	2.3%
10	Other Services	106	106	3.4%	0.8%
11	Administrative & Waste Services	73	73	2.3%	-6.8%
12	Wholesale Trade	67	67	2.1%	3.4%
13	Arts, Entertainment & Recreation	91	62	2.0%	12.6%
14	Finance & Insurance	45	45	1.4%	-1.7%
15	Real Estate	30	30	1.0%	1.0%
16	Utilities	27	27	0.9%	0.0%
17	Management of Companies	22	22	0.7%	-2.1%
18	Information	10	10	0.3%	-3.6%
19	Mining	7	7	0.2%	-2.8%
20	Transportation & Warehousing	102	0	0.0%	0.5%
Total County Employment		3,131	3,131	100.0%	2.1%

*Reported: As released by the Bureau of Labor Statistics and the Indiana Department of Labor

**Tourism Extracted: Tourism's contribution to jobs in each industry is removed and placed in Brown County's Tourism Industry

Tourism Increases Local Wages

Brown County Tourism: 2023 Labor Income (in thousands)

Industry (NAICS)*	Direct	Indirect	Induced	Total
Accommodations	\$6,838	\$11	\$5	\$6,854
Transportation & Warehousing	\$4,325	\$53	\$21	\$4,399
Food services & drinking places	\$3,434	\$345	\$194	\$3,972
Retail trade	\$707	\$28	\$226	\$961
Professional- scientific & tech services	\$0	\$830	\$118	\$948
Other services	\$0	\$426	\$176	\$602
Government & non NAICS	\$0	\$519	\$71	\$590
Administrative & waste services	\$0	\$541	\$41	\$582
Arts- entertainment & recreation	\$487	\$14	\$31	\$531
Construction	\$0	\$341	\$41	\$383
Manufacturing	\$0	\$243	\$29	\$272
Health & social services	\$0	\$0	\$267	\$267
Wholesale Trade	\$0	\$59	\$82	\$141
Real estate & rental	\$0	\$87	\$41	\$127
Finance & insurance	\$0	\$79	\$37	\$116
Information	\$0	\$101	\$12	\$113
Utilities	\$0	\$52	\$16	\$68
Ag, Forestry, Fish & Hunting	\$0	\$25	\$22	\$46
Management of companies	\$0	\$20	\$1	\$21
Educational services	\$0	\$2	\$17	\$19
Mining	\$0	\$0	\$0	\$1
Total - 2023	\$15,790	\$3,774	\$1,455	\$21,020
Total - 2022	\$14,411	\$3,462	\$1,329	\$19,203
% Change	9.6%	9.0%	9.5%	9.5%

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

Brown County
visitors generate
significant tax
revenue for both
Federal, **State, and**
Local Governments

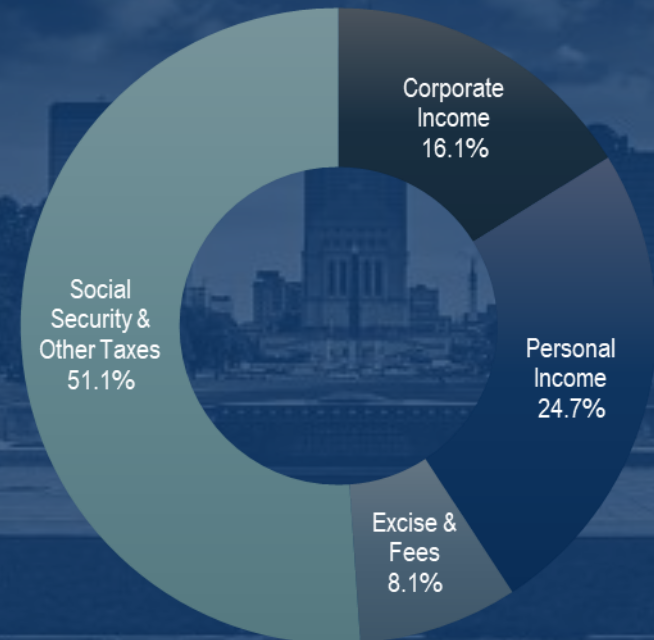
\$4.9 Million
Federal Taxes

\$8.8 Million
State + Local
Taxes

Social Security & Other Taxes Account for almost half the \$4.9 Million in Federal taxes

Social security and personal income together account for over 75% of federal tax dollars raised by Brown County tourism.

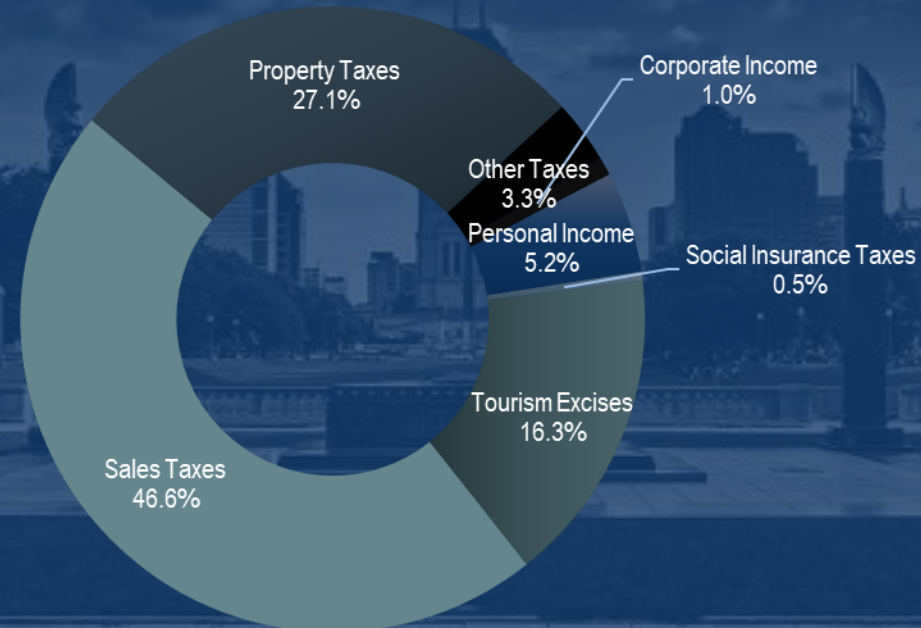
Federal Taxes
2023 Tax Total: \$4.9 Million



Sales Taxes Account for Almost Half of State and Local Tax Collections

Sales Taxes when coupled with property taxes account for over 73% of state and local tax contributions.

State & Local Taxes 2023 Tax Total: \$8.8 Million



Tourism Generated \$13.7 Million in Taxes

Brown County visitors supported \$13.7 million in total taxes in 2023, up 9.7% from 2022. Federal tax collections resulting from tourism in Brown County include income taxes and social security and totaled \$4.9 million in 2023. State & local tax collections totaled \$8.8 million, including \$4.1 million in sales taxes and \$2.4 million in local property taxes.

Corporate Income	2022	2023	% Change
Federal: US			
Corporate Income	\$721.4	\$788.2	9.3%
Personal Income	\$1,101.7	\$1,206.2	9.5%
Excise & Fees	\$363.4	\$396.9	9.2%
Social Security & Other Taxes	\$2,285.9	\$2,498.9	9.3%
Federal Total	\$4,472.4	\$4,890.1	9.3%
State & Local			
Corporate Income	\$76.9	\$84.1	9.3%
Personal Income	\$421.6	\$461.6	9.5%
Social Insurance Taxes	\$37.2	\$40.6	9.2%
Tourism Excises	\$1,266.1	\$1,442.1	13.9%
Hotel Tax	\$1,161.9	\$1,327.5	14.3%
Food & Beverage	\$104.3	\$114.6	9.9%
Rental Car Excise	\$0.0	\$0.0	0.0%
Sales Taxes	\$3,781.8	\$4,123.3	9.0%
Property Taxes	\$2,196.9	\$2,399.0	9.2%
Other Taxes	\$265.1	\$289.0	9.0%
State & Local Tax Total	\$8,045.7	\$8,839.7	9.9%
Total County Tourism-Initiated Taxes	\$12,518.1	\$13,729.8	9.7%

Sources: IMPLAN, Rockport Analytics

Putting the Benefits of Brown County Tourism in Perspective



Promoting a Healthy Job Market

Approximately 27.4% of all people working in Brown County are supported by visitors to the county. Brown County tourism supported 1,026 jobs. Of those, 858 were directly employed in a tourism-related job.

Tourism is the largest industry in Brown County (by jobs).



Benefiting County Businesses

Visitors generated top-line sales totaling \$39.3 million benefiting a broad array of local businesses.

Businesses that directly served visitors saw value-added of \$29.4 million in 2023, up 9.4% from 2022.

In 2023, tourism supply chain businesses received value-added of more than \$6.2 million.



Contributing to Public Education & Other Government Services

State & local (S&L) tax revenue collected from tourism in Brown County is sufficient to fund 693 Indiana public school students.

S&L tax collections were enough to fund roughly 165 Indiana public school teachers.



Capturing and Retaining Dollars Spent by Visitors

Of every dollar spent by visitors to Brown County, 53¢ in economic impact is returned to the local area.

Of every dollar spent by visitors to Brown County, 29¢ went toward paying the salaries of 1,026 area citizens.



Helping to Relieve the Tax Burden of County Households

About 12 cents of each visitor dollar went towards the payment of state and local taxes (S&L).

If tourism did not exist, each of the 6,695 households in Brown County would have to pay an additional \$1,320 per year in taxes to maintain current levels of state & local government services.

Sources: NEA's 2023 State Rankings, Moody's Analytics, IMPLAN, Indiana Department of Revenue, U.S. Census, Rockport Analytics

About Rockport Analytics

Rockport Analytics is a research and analytical consulting firm providing high quality quantitative and qualitative research solutions to business, government, and non-profit organization clients across the globe. We provide fast, nimble service in a completely transparent environment.

Capabilities include:

- Market Analysis and Forecasting
- Economic Impact Assessment, Tourism Satellite Accounting, and Economic Development
- Market Modeling and Decision Support Tools
- Project Feasibility Assessment
- Primary and Secondary Research Synthesis
- Stakeholder Surveys – internal & external



Rockport Analytics, LLC

Annapolis, MD
West Chester, PA

rockportanalytics.com
info@rockportanalytics.com
(866) 481-9877