



The Economic Impact of Tourism in Maryland



Tourism Satellite Account
Calendar Year 2015



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MD tourism economy reaches new peaks

- The Maryland visitor economy continued to grow in 2015; tourism industry sales rose 3.5% to \$16.8 billion.
 - Visitor volumes expanded 5.8%, reaching 41.1 million visitors in 2015.
 - Leisure markets continue to drive performance.
 - Visitor spending has grown for six straight years, expanding 31% since 2009.
- Visitor spending generated \$28.4 billion in total business sales across all Maryland industries in 2015.

Tourism is an economic engine

- Tourism supported 218,500 jobs, both directly and indirectly, accounting for 6.1% of total employment in Maryland.
- The tourism sector directly generated \$8.3 billion of state GDP in 2015.
- Including indirect and induced impacts, tourism in Maryland generated \$2.3 billion in state and local taxes and \$2.0 billion in Federal taxes last year.

Tourism-supported tax revenues surpassed \$1,040 per Maryland household in 2015.

One-in-16.5 jobs in the State of Maryland is supported by tourism.

Conceptual Overview



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Why quantify the tourism economy?

- By monitoring tourism's economic impact, policy makers can make informed decisions regarding the funding and prioritization of tourism development.
- It can also carefully monitor its successes and future needs.
- In order to do this, tourism must be measured in the same categories as other economic sectors – i.e. tax generation, employment, wages, and gross domestic product.

Why is this a challenge?

- Most economic sectors such as financial services, insurance, or construction are easily defined within a country's national accounts statistics.
- Tourism is not so easily measured because it is not a single industry. It is a demand-side activity which affects multiple sectors to various degrees.
- Tourism spans nearly a dozen sectors including lodging, recreation, retail, real estate, air passenger transport, food & beverage, car rental, taxi services, travel agents...

The Tourism Satellite Account

- The TSA was conceived by the UN World Tourism Organization and has since been ratified by the UN, Eurostat, and OECD.
- The standard has been adopted by over fifty countries around the world and a growing number of US States.
- The TSA deals with the challenge of measuring tourism in two important ways:
 - Defines the tourism economy
 - Provides methodology for calculating tourism GDP in a way that is consistent with economic accounts

Benefits of a TSA

- Enables comparisons of the importance of tourism to other sectors of the economy in terms of GDP, employment, and income.
- Allows for benchmarking to other destinations.
- Tracks the economic contribution of tourism over time.
- Monitors strength by tracking capital investment .
- Allows for extension analysis for of the full impact of tourism.

Important definitions

1. **Tourism Industry:** Measures the value of traveler activity within “tourism characteristic industries”. This concept measures only the direct impact of the travel industry.
2. **Tourism Economy:** Includes the tourism industry plus government spending and capital investment in support of tourism. This is the basis of the total economic impact analysis, including direct, indirect and induced impacts.

Illustrating the concepts

Travel & Tourism Industry

- The direct effect of visitor spending
- Focus of Tourism Satellite Account



Travel & Tourism Economy

The flow-through effect of all tourism demand across the economy

- Expands the focus to measure the overall impact of tourism on all sectors of the economy

Detailed State Results



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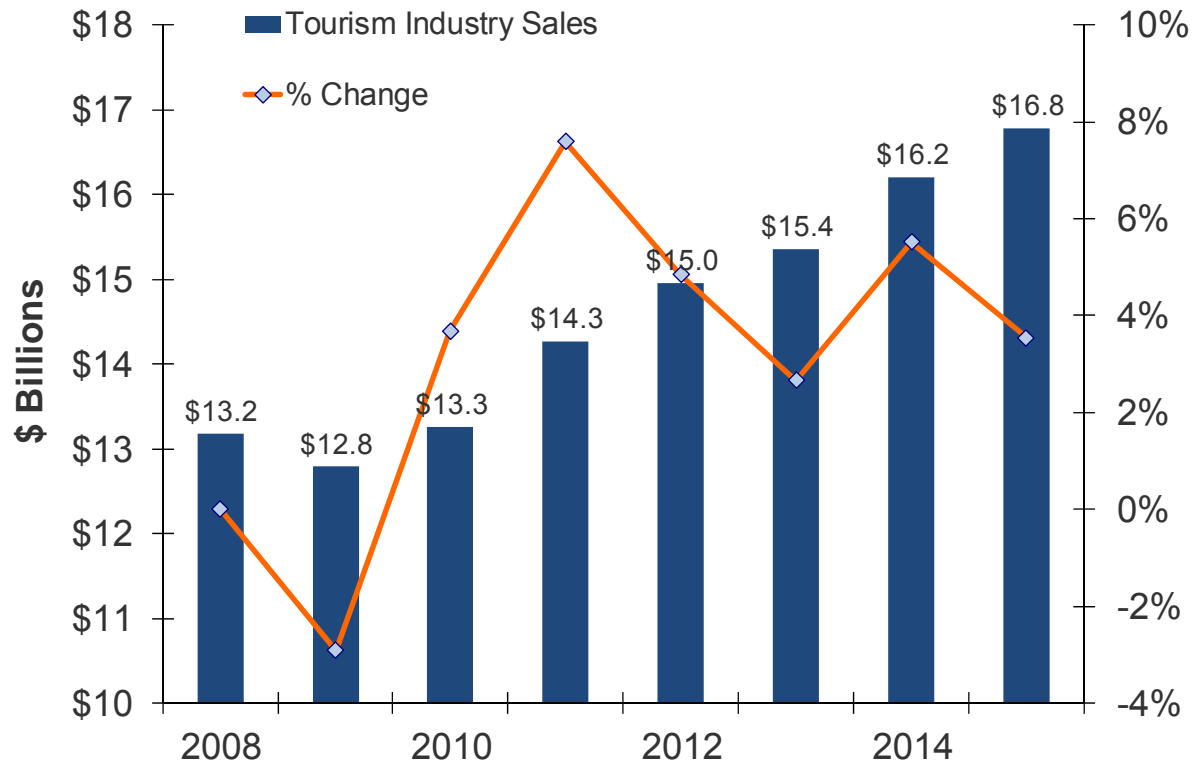
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Key volume and spending trends

- Visitor volume and visitor spending growth continued in 2015.
- Maryland tourism industry sales (visitor spending) increased 3.5% in 2015—the sixth straight year of growth.
- Lower gas prices spurred travel in 2015, providing a surge in day travel which outpaced overnight visits.
- Visitor spending on food & beverages and lodging services led all categories.
- Capital investment in the tourism industry continued to grow.

A new peak in tourism industry sales

- Visitor spending growth of 3.5% in 2015 brought tourism industry sales to \$16.8 billion.
- Visitor spending was \$4.0 billion higher in 2015 than in 2009.



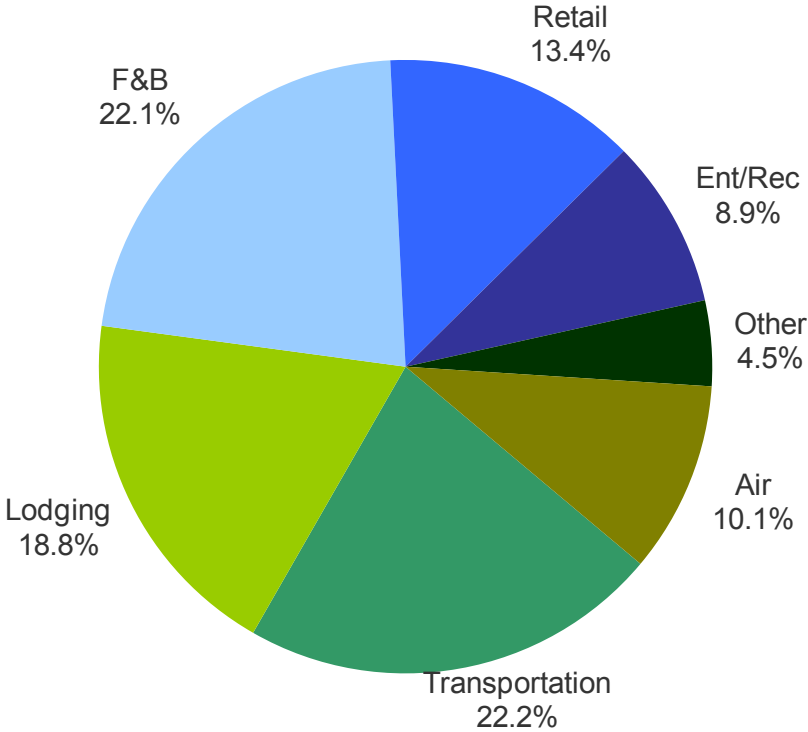
Benefits of the expansion were widespread

Tourism Industry Sales									
(Millions)									
Sector	2008	2009	2010	2011	2012	2013	2014	2015	% Change
Transportation	\$3,081.3	\$2,698.5	\$2,790.3	\$3,189.6	\$3,343.3	\$3,436.4	\$3,645.6	\$3,720.2	2.0%
Lodging	\$2,544.4	\$2,476.0	\$2,616.7	\$2,721.2	\$2,888.6	\$2,864.2	\$3,039.4	\$3,162.2	4.0%
F&B	\$2,682.4	\$2,710.4	\$2,757.0	\$2,874.1	\$3,079.3	\$3,234.7	\$3,493.1	\$3,704.1	6.0%
Retail	\$1,851.6	\$1,886.2	\$1,934.1	\$2,086.7	\$2,205.1	\$2,222.1	\$2,223.6	\$2,247.8	1.1%
Ent/Rec	\$1,089.8	\$1,060.3	\$1,116.9	\$1,208.3	\$1,277.6	\$1,345.4	\$1,458.9	\$1,498.3	2.7%
Other	\$554.9	\$590.1	\$607.9	\$654.7	\$630.0	\$669.4	\$709.3	\$755.6	6.5%
Air	\$1,369.4	\$1,369.2	\$1,439.0	\$1,533.3	\$1,536.3	\$1,585.4	\$1,636.1	\$1,691.8	3.4%
TOTAL	\$13,173.8	\$12,790.6	\$13,261.8	\$14,267.9	\$14,960.1	\$15,357.6	\$16,206.0	\$16,779.9	3.5%
Pch Change		-2.9%	3.7%	7.6%	4.9%	2.7%	5.5%	3.5%	

- Tourism industry sales increased \$575 million in 2015, led by a \$211 million increase in food & beverage sales.
- Growth in food & beverage purchases was strongest among the key tourism industries, growing 6.0%.
- The lodging industry also performed well with revenue growth of 4.0%.

Tourism industry sales by sector

Tourism Industry by Sector



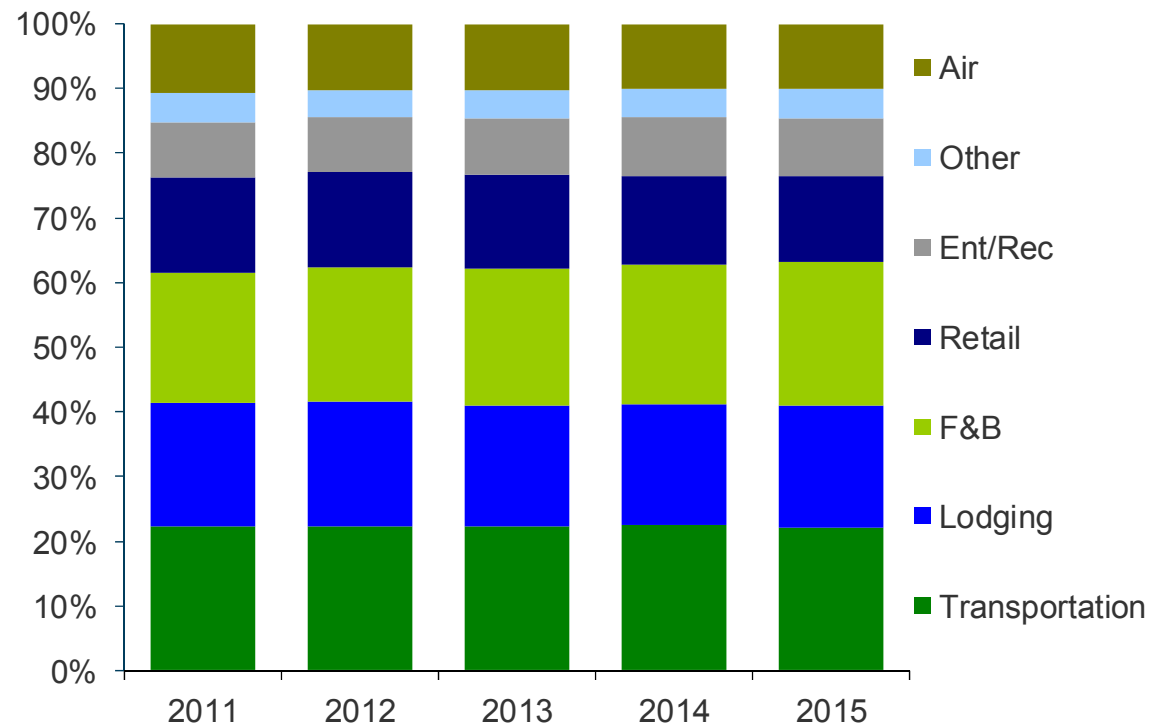
- More than 60% of visitor spending takes place in three industries: transportation, food & beverages and lodging.
- Transportation includes air transportation of both visitors to MD and MD resident flights to other destinations.

Tourism industry sales over time

- The share of the visitor dollar spent on food & beverages continued to rise in 2015, reaching a share not seen since 2009.
- Entertainment & recreation's share surpassed 9% of all visitor spending in 2015 after falling as low as 8.2% in 2009.

Maryland's Tourism Industry

by Year, Share of Total



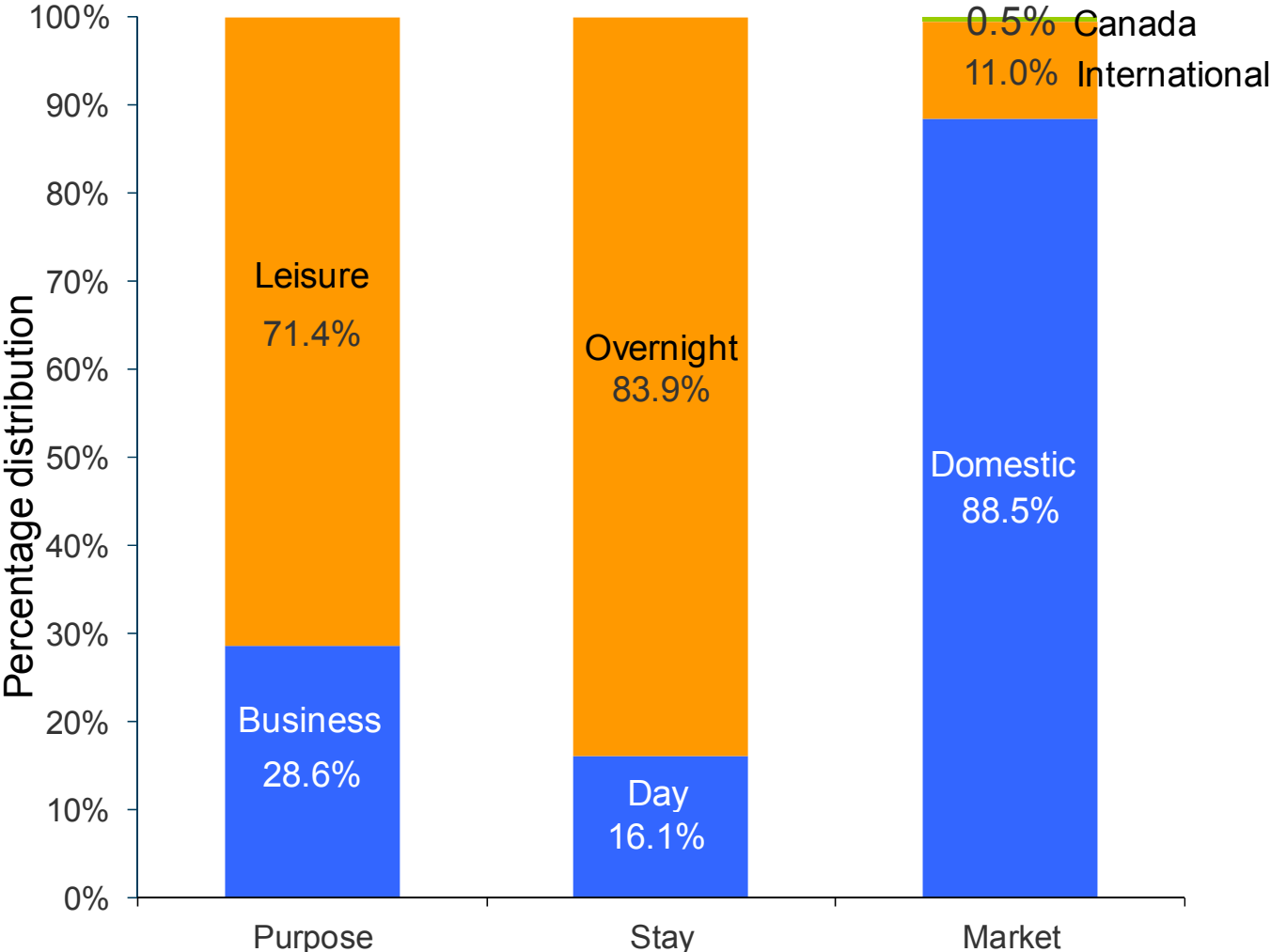
Source: DK Shifflet, Tourism Economics, NTTO

Tourism industry sales by market segment

- Leisure tourism represents 71.4% of visitor spending in MD.
- Overnight visitors spent \$14.1 billion, or 84% of the total.
- Visitor spending growth was led by domestic visitors.
- Canadian visitor spending fell in 2015, following the national trend.

Tourism Industry Sales in 2015					
(US\$ Million)					
Purpose		Stay		Market	
Business	\$ 4,804.8	Day	\$ 2,703.7	Domestic	\$ 14,853.4
Leisure	\$ 11,975.2	Overnight	\$ 14,076.2	Overseas	\$ 1,849.0
				Canada	\$ 77.6
TOTAL	\$ 16,779.9		\$ 16,779.9		\$ 16,779.9
Share					
Business	28.6%	Day	16.1%	Domestic	88.5%
Leisure	71.4%	Overnight	83.9%	Overseas	11.0%
				Canada	0.5%
TOTAL	100%		100%		100%
Growth Rate					
Business	0.0%	Day	11.6%	Domestic	10.3%
Leisure	5.0%	Overnight	2.1%	Overseas	2.7%
				Canada	-9.2%
TOTAL	3.5%		3.5%		3.5%

Tourism industry sales by market segment



Tourism capital investment

Tourism Capital Investment (Millions of US\$)							
	2009	2010	2011	2012	2013	2014	2015
Construction	\$262.4	\$283.9	\$268.0	\$191.1	\$386.8	\$416.0	\$469.1
Machinery & Equipment	\$525.8	\$545.6	\$604.7	\$636.8	\$654.7	\$696.4	\$719.7
Total	\$788.2	\$829.5	\$872.6	\$827.9	\$1,041.5	\$1,112.4	\$1,188.7

- Nearly \$1.2 billion was invested by the tourism sector last year, including hotels, recreational facilities, and related government capital outlays.
- Investment across all sectors has increased as confidence builds in the overall economy.

Tourism economy sales

- The Tourism Satellite Account looks at a broad range of tourism-related expenditures which reached \$18.2 billion in 2015.

Tourism Satellite Account 2015 Spending by Category (US\$ Million)					
Domestic Visitor	International Visitor	Non-Visitor PCE	Gov't Support	CAPEX	Total
\$14,853.4	\$1,926.5	\$65.2	\$135.9	\$1,188.7	\$18,169.8

- Non-visitor private consumption expenditures (PCE) represent tourism consumer durables such as an RV, boat, or furniture for a vacation home.
- Government support for tourism includes the budgets for the MD Office of Tourism Development and other budget items in broad support of tourism.
- Capital investment (CAPEX) includes construction of hotels and attractions, as well as tourism equipment and infrastructure.

Tourism industry and economy sales

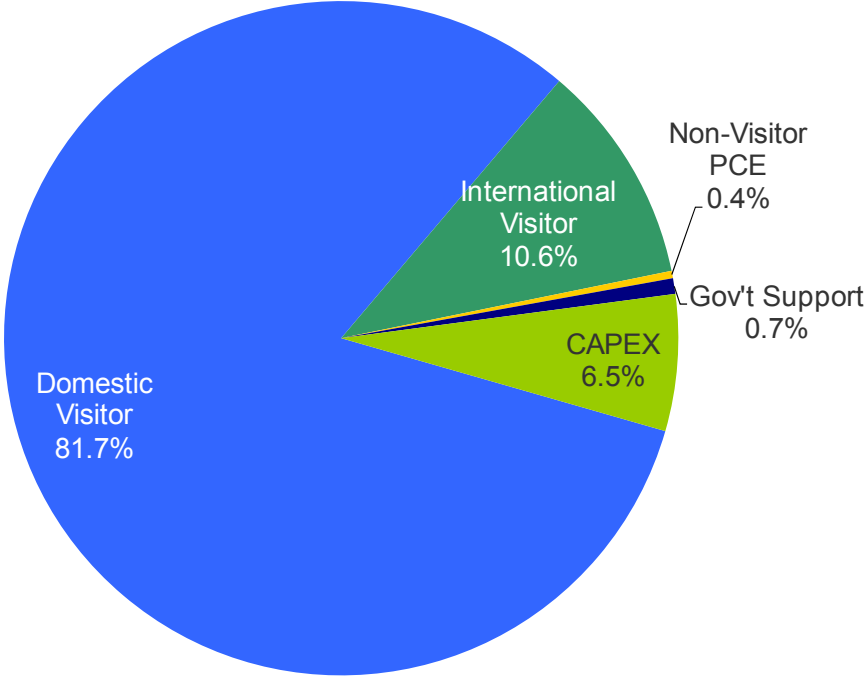
- The direct impact of tourism is driven by tourism industry sales only. This allows for apples-to-apples comparisons with other industries.
- The total economic impact of tourism includes investment in support of tourism, government spending and non-visitor private consumption expenditures (PCE).

Tourism Sales, 2015		
State of Maryland		
Category	Industry	Economy
Lodging	\$3,162.2	\$3,162.2
Food & Beverage	\$3,704.1	\$3,704.1
Recreation	\$2,253.9	\$2,253.9
Shopping	\$2,247.8	\$2,247.8
Air	\$1,691.8	\$1,691.8
Other Transport	\$3,720.2	\$3,720.2
Non-Visitor PCE	\$0.0	\$65.2
Investment	\$0.0	\$1,188.7
Government	\$0.0	\$135.9
Total	\$16,779.9	\$18,169.8

(Data shown in millions)

Tourism economy sales by source

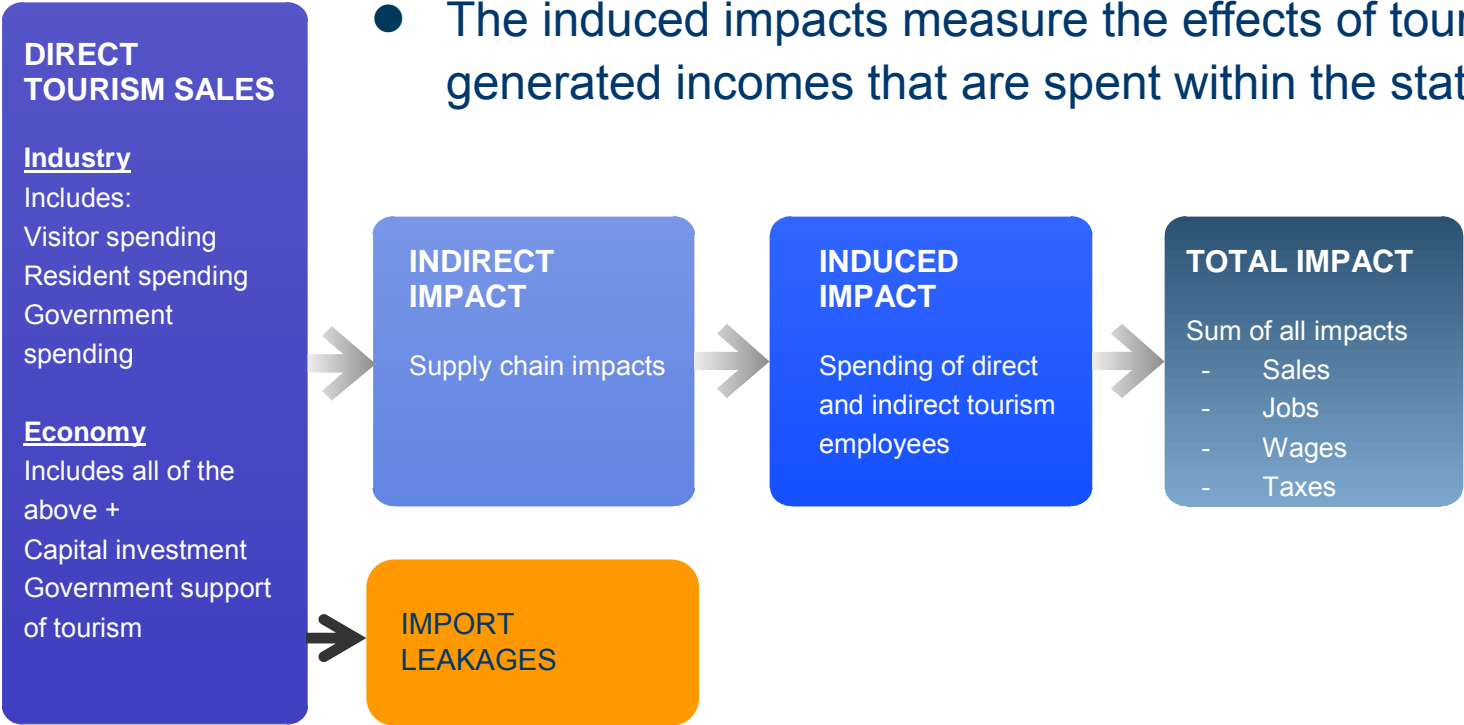
Tourism Economy Sales by Source



- Domestic visitor markets grew in importance in 2015, providing 81.7% of tourism sales in Maryland.
- Capital investment in tourism-related construction and machinery & equipment grew to a 6.5% share of tourism economy sales.

Translating sales into impact

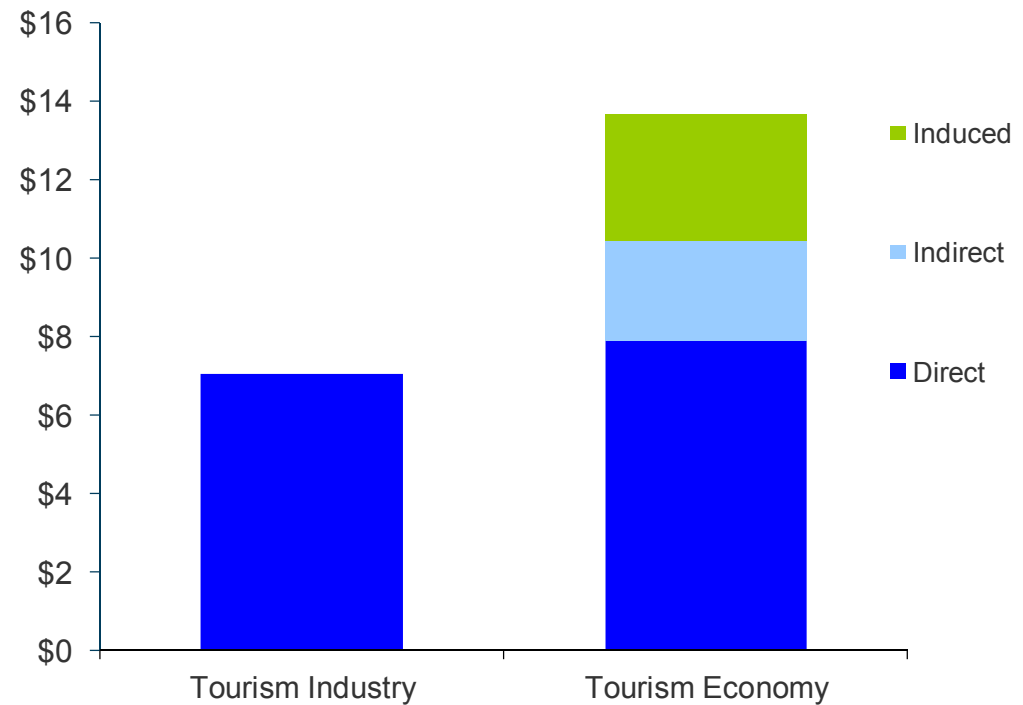
- Direct tourism sales flow through the MD economy, generating GDP, jobs, wages, and taxes.
- The indirect impacts measure supply chain (b2b) activity generated by tourism sales.
- The induced impacts measure the effects of tourism-generated incomes that are spent within the state.



Tourism impact summary

- Tourism industry GDP grew 5.1% in 2015, directly generating \$7.4 billion of Maryland GDP.
- The tourism economy, including direct, indirect and induced impacts, generated GDP of \$14.4 billion. This is 4.0% of the state economy.

Tourism GDP Impact
2015, US\$ Billions



Source: Tourism Economics

State Tourism Industry Impacts (Direct)

Tourism industry impacts

Tourism Industry Impacts		
	GDP (Millions)	Jobs (Units)
Agriculture, Fishing, Mining	-	-
Construction and Utilities	-	-
Manufacturing	-	-
Wholesale Trade	-	-
Air Transport	\$555.5	3,862
Other Transport	\$860.9	13,188
Retail Trade	\$665.1	13,968
Gasoline Stations	\$242.1	4,133
Communications	-	-
Finance, Insurance and Real Estate	\$406.9	2,687
Business Services	\$93.1	1,032
Education and Health Care	-	-
Recreation and Entertainment	\$1,012.1	28,208
Lodging	\$1,684.0	25,356
Food & Beverage	\$1,804.7	48,729
Personal Services	\$115.0	2,461
Government	-	-
TOTAL	\$7,439.4	143,625
Growth Rate	5.36%	2.38%

- Tourism GDP is the value added of those sectors directly interacting with travelers.
- The narrow definition of the tourism industry counts only tourism industry sales, which excludes capital investment and general government support of tourism. This definition is consistent with economic accounts.
- On this basis, tourism industry GDP tallied \$7.4 billion in 2015, and tourism industry employment of 143,625, or 4.0% of total Maryland employment.

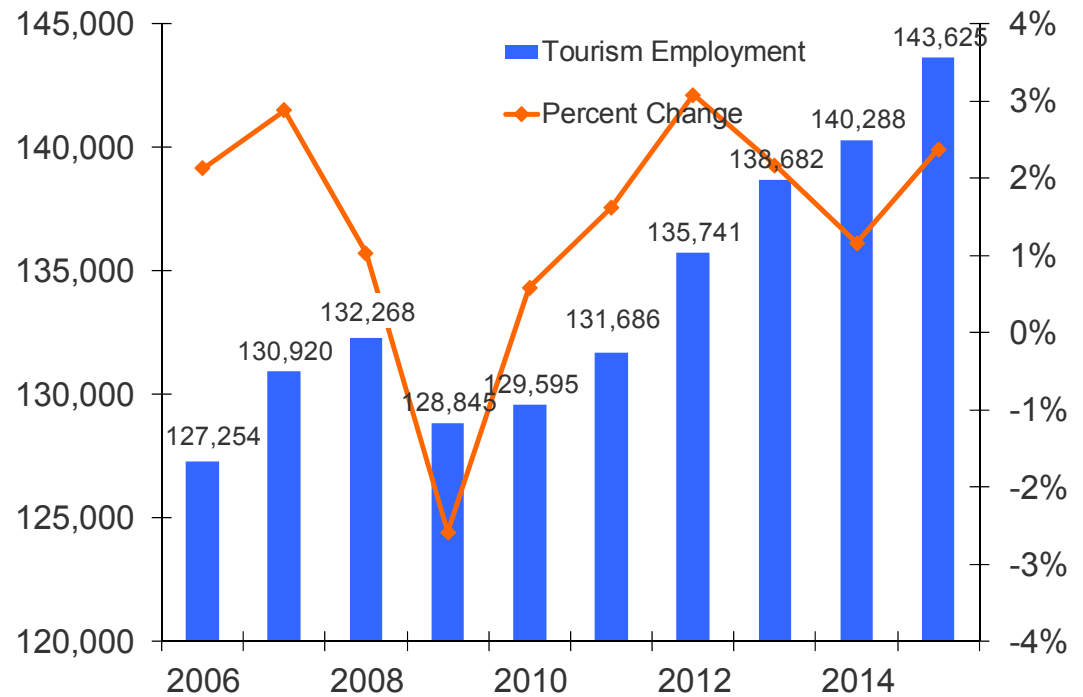
Why sales and GDP differ

- Tourism industry sales in Maryland equals \$16.8 billion while GDP measures \$7.4 billion
- GDP (Gross domestic product) is less than sales because it measures only the locally-produced value of goods and services consumed by visitors
 - This includes the local labor, capital depreciation, and the profits of tourism-related companies that are based in Maryland
 - The costs of imported goods (gasoline, food or retail goods) that come from out-of-state are excluded from the GDP calculation
 - In addition, business profits from out-of-state companies are also excluded. For example, Wal-Mart profits leave the state.

Tourism employment growth outpaces state

Tourism Employment										
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Tourism Employment	127,254	130,920	132,268	128,845	129,595	131,686	135,741	138,682	140,288	143,625
Percent Change	2.1%	2.9%	1.0%	-2.6%	0.6%	1.6%	3.1%	2.2%	1.2%	2.4%

- With continued growth in both visitation and sales, tourism businesses hired in 2015. Tourism employment grew 2.4%.
- Tourism job growth outpaced broader job growth; total MD employment grew 1.8% in 2015.



Ranking tourism employment

- The direct employment contribution of the tourism industry tallied 143,625 in 2015. This narrow measurement of tourism includes only those jobs directly supported by visitor activity and allows for inter-industry ranking.
- On this basis, tourism is the 12th largest employer in the State of Maryland.

Employment Ranking State of Maryland		
Rank	Industry	2015
1	Health care and social assistance	430,766
2	Professional, scientific, and technical services	350,817
3	Retail trade	349,701
4	Local government	244,438
5	Accommodation and food services	242,322
6	Administrative and waste management services	233,930
7	Construction	226,303
8	Other services, except public administration	216,125
9	Real estate and rental and leasing	180,392
10	Federal, civilian	173,183
11	Finance and insurance	160,095
12	Tourism	143,625
13	Transportation and warehousing	114,527
14	Manufacturing	114,486
15	Educational services	104,338

Ranking tourism employment to private sector

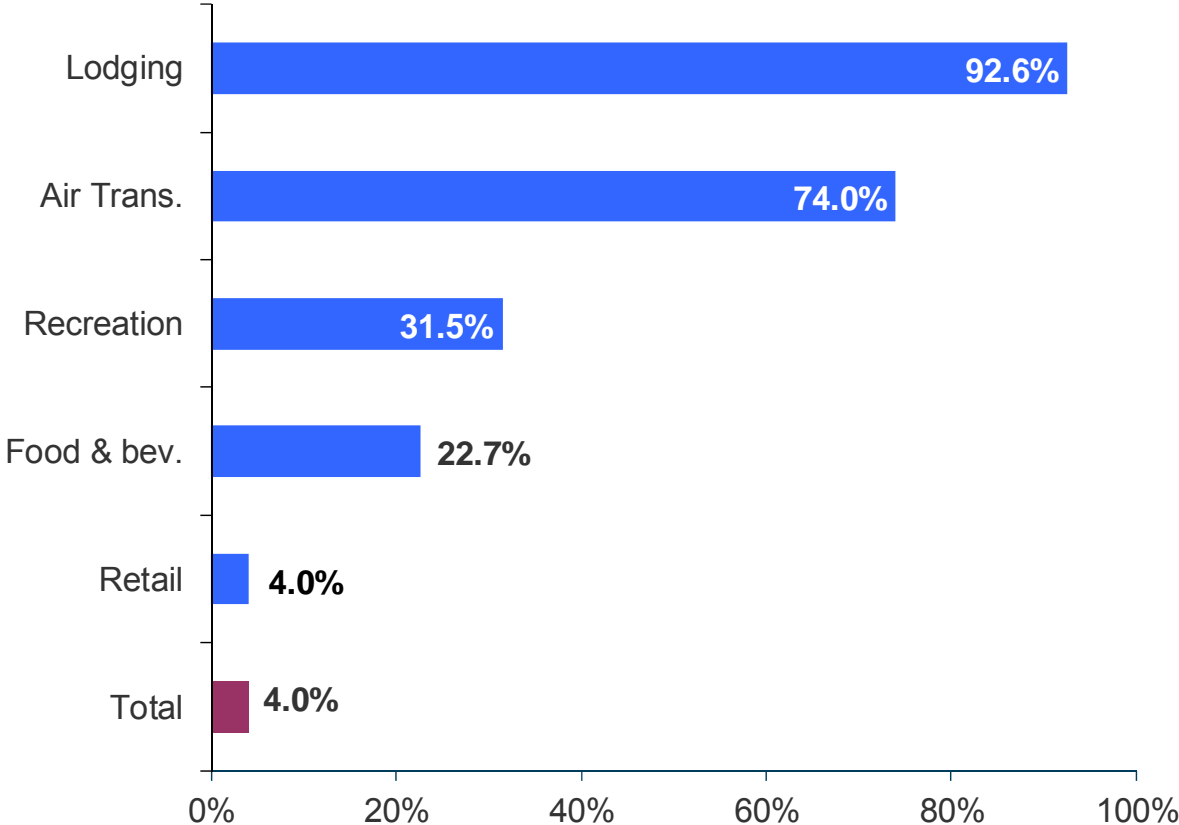
- Examining the tourism industry against other *private sector* industries, tourism is the 10th largest employer in the State of Maryland.

Employment Ranking - Private Sector State of Maryland		
Rank	Industry	2015
1	Health care and social assistance	430,766
2	Professional, scientific, and technical services	350,817
3	Retail trade	349,701
4	Accommodation and food services	242,322
5	Administrative and waste management services	233,930
6	Construction	226,303
7	Other services, except public administration	216,125
8	Real estate and rental and leasing	180,392
9	Finance and insurance	160,095
10	Tourism	143,625
11	Transportation and warehousing	114,527
12	Manufacturing	114,486
13	Educational services	104,338
14	Wholesale trade	100,227
15	Arts, entertainment, and recreation	89,578

Tourism employment intensity

- Tourism is a significant part of several industries, representing 93% of lodging, 74% of air transport, 32% of recreation, and 23% of F&B.

Tourism Employment Intensity by Industry



State Tourism Economy Impacts

(direct, indirect, and induced)

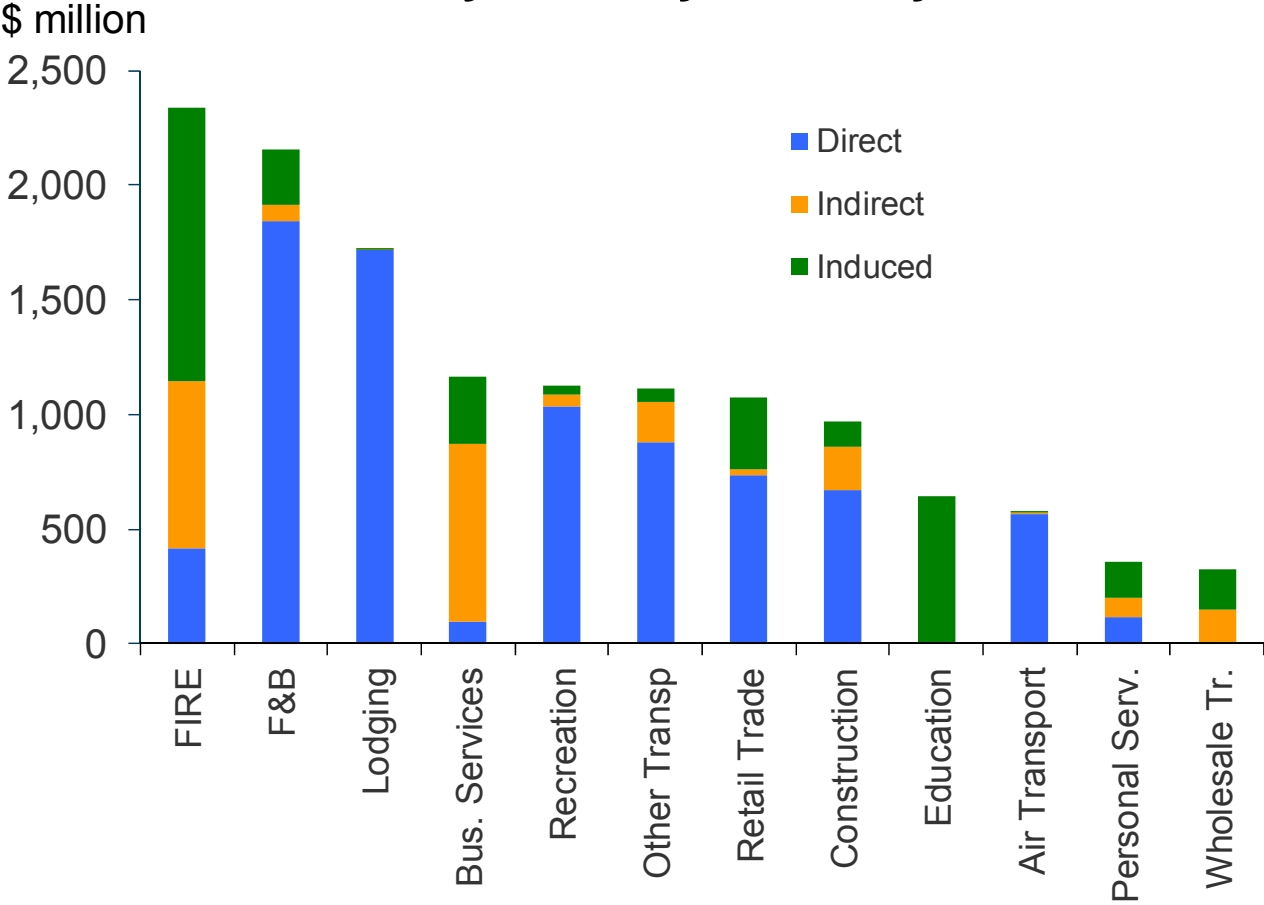
Tourism economy GDP– total impact

Tourism Economy GDP Impact (US\$ Million)				
	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	-	3.7	2.4	6.1
Construction and Utilities	667.0	193.0	107.8	967.8
Manufacturing	3.4	79.0	40.2	122.6
Wholesale Trade	-	148.9	173.3	322.1
Air Transport	566.8	4.3	7.7	578.8
Other Transport	878.4	179.3	53.5	1,111.2
Retail Trade	733.8	29.6	310.7	1,074.1
Gasoline Stations	247.0	1.2	13.7	261.9
Communications	-	208.6	109.5	318.1
Finance, Insurance and Real Estate	415.2	732.6	1,188.2	2,335.9
Business Services	95.0	779.0	293.9	1,168.0
Education and Health Care	-	4.7	642.7	647.4
Recreation and Entertainment	1,032.7	54.6	40.7	1,127.9
Lodging	1,718.3	2.5	2.5	1,723.2
Food & Beverage	1,841.3	75.8	239.0	2,156.1
Personal Services	117.3	86.3	152.1	355.7
Government	28.2	86.6	35.1	149.9
TOTAL	8,344.4	2,669.6	3,412.9	14,426.8
Pch Change	5.8%	5.2%	5.2%	5.6%

Tourism economy GDP– total impact

- All sectors of the Maryland economy benefit from tourism activity directly and/or indirectly.

Tourism Economy GDP by Industry



Tourism economy employment – total impact

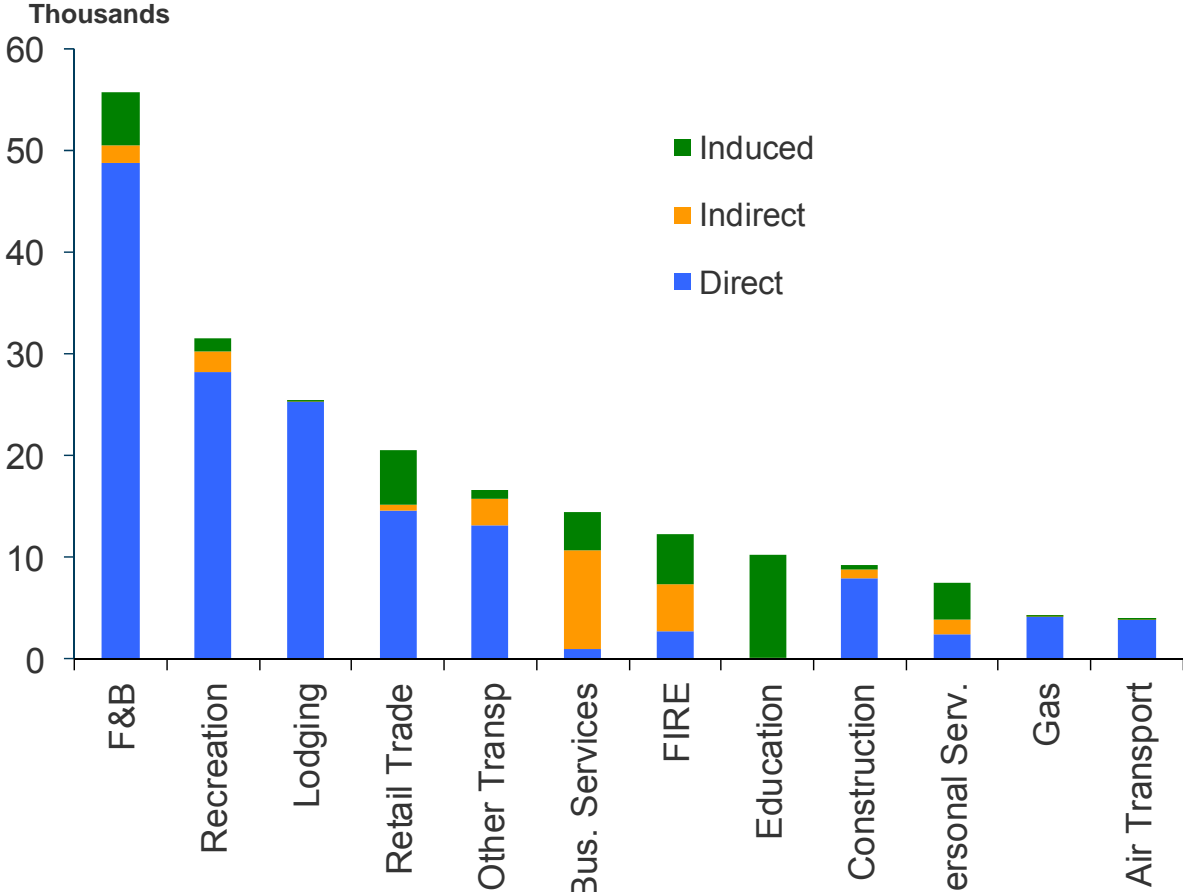
Tourism Economy Employment				
	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	-	162	116	278
Construction and Utilities	7,911	855	475	9,241
Manufacturing	41	577	291	909
Wholesale Trade	-	867	1,031	1,898
Air Transport	3,862	28	52	3,942
Other Transport	13,188	2,589	863	16,639
Retail Trade	14,659	503	5,332	20,494
Gasoline Stations	4,133	20	227	4,380
Communications	-	1,113	527	1,640
Finance, Insurance and Real Estate	2,687	4,710	4,944	12,341
Business Services	1,032	9,705	3,782	14,519
Education and Health Care	-	104	10,088	10,192
Recreation and Entertainment	28,208	2,009	1,267	31,484
Lodging	25,356	35	35	25,426
Food & Beverage	48,729	1,853	5,228	55,809
Personal Services	2,461	1,460	3,521	7,443
Government	379	1,047	467	1,892
TOTAL	152,646	27,636	38,246	218,528
Growth Rate	2.3%	1.8%	1.9%	2.2%

- The tourism sector directly and indirectly supported 218,528 jobs, or 6.1% of all employment in Maryland last year.

Tourism economy employment – total impact

- The restaurant, lodging, and retail sectors employed the most persons in the tourism sector.
- Secondary benefits are realized across the entire economy through the supply chain and incomes as they are spent.

Tourism Employment by Industry



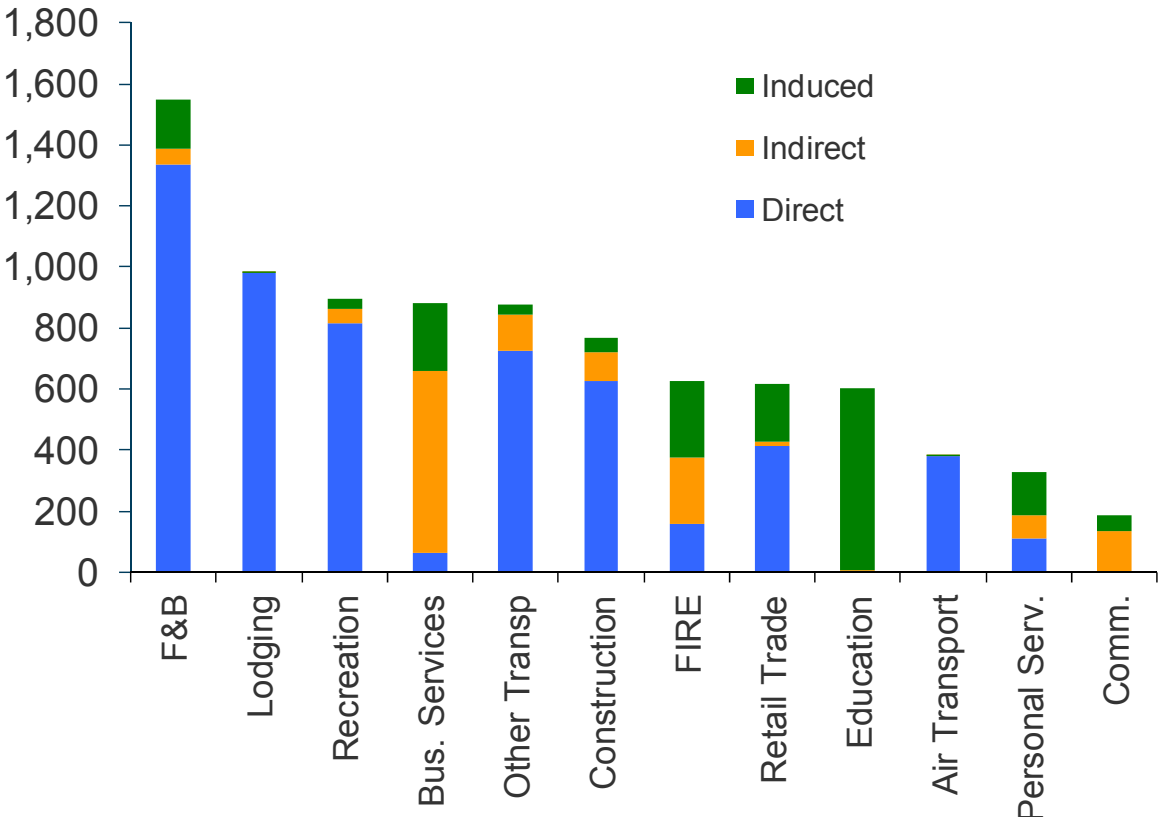
Tourism economy income – total impact

Tourism Labor Income (Compensation)				
(US\$ Million)				
	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	-	4.1	3.1	7.2
Construction and Utilities	628.1	90.2	49.6	768.0
Manufacturing	2.4	43.3	21.6	67.3
Wholesale Trade	-	83.0	97.1	180.1
Air Transport	378.7	2.7	5.0	386.5
Other Transport	724.0	118.7	34.5	877.2
Retail Trade	410.9	18.1	186.1	615.1
Gasoline Stations	143.3	0.7	8.0	152.1
Communications	-	134.7	52.8	187.5
Finance, Insurance and Real Estate	158.4	218.9	249.9	627.3
Business Services	63.6	595.2	224.9	883.7
Education and Health Care	-	3.8	598.7	602.5
Recreation and Entertainment	813.4	49.6	33.2	896.2
Lodging	980.8	1.3	1.4	983.6
Food & Beverage	1,337.2	52.1	158.5	1,547.8
Personal Services	108.6	76.1	143.7	328.5
Government	25.1	93.1	38.1	156.3
TOTAL	5,774.8	1,585.7	1,906.4	9,266.8
Pch Change	6.0%	5.0%	5.5%	5.7%

Tourism economy income – total impact

- Employees in the food & beverage industry earned \$1.5 billion through tourism in 2015.
- Of the \$884 million in tourism-driven income in business services, \$595 million was a result of this industry supplying services to tourism businesses (indirect impacts).

Tourism Labor Income by Industry
\$ million



Tourism economy tax generation

Traveler Generated Taxes						
Tax Type	2011	2012	2013	2014	2015	Pch Chnge
	Millions of \$					
Federal Taxes Subtotal	<u>1,633.2</u>	<u>1,704.8</u>	<u>1,772.5</u>	<u>1,865.5</u>	<u>1,966.2</u>	<u>5.4%</u>
Corporate	113.0	118.6	123.1	129.2	136.4	5.6%
Indirect Business	166.9	173.7	181.8	188.5	193.1	2.5%
Personal Income	524.2	547.1	568.5	599.5	634.0	5.7%
Social Security	829.1	865.4	899.1	948.3	1,002.7	5.7%
State and Local Taxes Subtotal	<u>1,953.3</u>	<u>2,022.2</u>	<u>2,078.8</u>	<u>2,187.3</u>	<u>2,269.2</u>	<u>3.7%</u>
Corporate	176.2	184.9	191.9	201.5	212.7	5.6%
Personal Income	205.0	214.0	222.3	234.5	248.0	5.7%
Sales	818.6	853.5	886.2	939.7	969.8	3.2%
Lodging	<u>122.0</u>	<u>128.0</u>	<u>126.9</u>	<u>133.4</u>	<u>141.3</u>	<u>5.9%</u>
Local	122.0	128.0	126.9	133.4	141.3	5.9%
Property	389.6	389.6	389.6	400.6	410.4	2.4%
Excise and Fees	223.2	232.7	241.6	256.2	264.5	3.2%
State Unemployment	18.7	19.5	20.3	21.4	22.6	5.7%
TOTAL	<u>3,586.5</u>	<u>3,727.0</u>	<u>3,851.3</u>	<u>4,052.9</u>	<u>4,235.4</u>	<u>4.5%</u>

- Taxes of \$4.2 billion were directly and indirectly generated by tourism in 2015.
- State and local taxes alone tallied \$2.3 billion.
- Each household in Maryland would need to be taxed an additional \$1,040 per year to replace the tourism taxes received by state and local governments.
- Each visitor adds \$55 to state and local coffers.

County Results

Impact results in context



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Tourism visitation and spending in context

- The 41.1 million visitors would be like having everyone from Pennsylvania, New York and Virginia, visiting Maryland once in 2015.
- Maryland hosts an average of 112,500 visitors per day – twice the population of Towson, MD EACH DAY.
- \$16.8 billion in visitor spending is larger than the spending of ALL Americans on Easter.
- If Maryland tourism was a company, it would rank 168th (up 20 spots!) on the Fortune 500 list, around the same size as Bristol-Myers Squibb.
- Visitor spending increased \$575 million between 2014 and 2015, twice as large as the estimated cost of the I-895 Canton Viaduct (\$290 million and spread over 5 years).

Tourism impacts in context

- Were the 143,625 direct tourism workers not employed, the unemployment rate in 2015 would have been 9.7% in Maryland, 4.5 percentage points higher than the actual rate.
- The nearly 218,500 jobs supported by tourism is similar to the total jobs in BOTH Frederick and Carroll Counties.
- Each household in Maryland would need to be taxed an additional \$1,040 per year to replace the tourism taxes received by state and local governments.
- With the average American spending \$830 on Christmas in 2016, the savings from tourism would pay all those pesky Xmas bills in January with enough left over for Valentine's Day.

Methodology and Background



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Methods and data sources

- Domestic visitor expenditure estimates are provided by DK Shifflet representative survey of US travelers. These are broken out by sectors (lodging, transport at destination, food & beverage, retail, and recreation), by purpose (business and leisure), and by length of stay (day and overnight).
- Tourism Economics then adjusts these levels of spending based on a range of known measures of tourism activity:
 - Overseas visitor spending (source: NTTO, TE)
 - Canada visitor spending (source: Statistics Canada, TE)
 - Bed tax receipts
 - Sales tax by sector
 - Spending on air travel which accrues to all airports and locally-based airlines
 - Gasoline purchases by visitors (source: TE calculation)
 - Smith Travel Research data on hotel revenues
 - Construction Value by McGraw-Hill Construction
 - Industry data on employment, wages, GDP, and sales (source: BEA, BLS, Census)

Methods and data sources

- An IMPLAN model was compiled for the State of Maryland. This traces the flow of visitor-related expenditures through the local economy and their effects on employment, wages, and taxes. IMPLAN also quantifies the indirect (supplier) and induced (income) impacts of tourism.
- All results are benchmarked and cross-checked and adjusted based on the following:
 - US Bureau of Labor Statistics and Bureau of Economic Analysis (employment and wages by industry)
 - US Census (business sales by industry)
- The source of the employment and wage data is the Regional Economic Information System (REIS), Bureau of Economic Analysis, U.S. Department of Commerce. All employment rankings are based on Bureau of Labor Statistics (ES202/QCEW) data.

About Tourism Economics

- Tourism Economics, headquartered in Philadelphia, is an Oxford Economics company dedicated to providing high value, robust, and relevant analyses of the tourism sector that reflects the dynamics of local and global economies. By combining quantitative methods with industry knowledge, Tourism Economics designs custom market strategies, project feasibility analysis, tourism forecasting models, tourism policy analysis, and economic impact studies.
- Our staff have worked with over 300 destinations to quantify the economic value of tourism, forecast demand, guide strategy, or evaluate tourism policies.
- Oxford Economics is one of the world's leading providers of economic analysis, forecasts and consulting advice. Founded in 1981 as a joint venture with Oxford University's business college, Oxford Economics is founded on a reputation for high quality, quantitative analysis and evidence-based advice. For this, it draws on its own staff of 150 highly-experienced professional economists; a dedicated data analysis team; global modeling tools; close links with Oxford University, and a range of partner institutions in Europe, the US and in the United Nations Project Link.
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