

ECONOMIC IMPACT OF TRAVEL & TOURISM IN PENNSYLVANIA 2019

Prepared for:
Pennsylvania Tourism Office
Department of Community and Economic Development



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INTRODUCTION

The travel sector is an integral part of the Pennsylvania economy. Visitors generate significant economic benefits to households, businesses, and government and represent a critical driver of Pennsylvania's future. Employment supported by visitor activity rose to 521,100—6.6% of the state's total employment number in 2019.

By monitoring the visitor economy, policymakers can inform decisions regarding the funding and prioritization of the sector's development. They can also carefully monitor its successes and future needs. This is particularly true for Pennsylvania as it builds upon its travel and tourism economy. By establishing a baseline of economic impacts, the industry can track its progress over time.

To quantify the economic significance of the travel and tourism sector in Pennsylvania, Tourism Economics has prepared a comprehensive model detailing the wide-reaching impacts arising from visitor spending. The results of this study show the scope of the travel sector in terms of direct visitor spending, as well as the total economic impacts, jobs, personal income, and fiscal (tax) impacts in the broader economy.

The analysis draws on the following data sources:

- Longwoods International survey data, including spending and visitor profile characteristics for visitors to Pennsylvania
- U.S. Bureau of Economic Analysis and Bureau of Labor Statistics: employment and wage data, by industry
- STR: Lodging performance data, including room demand, room rates, occupancy, and room revenue
- U.S. Census Bureau: business sales by industry and seasonal second homes inventory
- Pennsylvania Department of Revenue – sales tax data by industry and other data points
- Pennsylvania Gaming Commission – casino information
- Local room tax revenues – county sources

KEY FINDINGS

KEY FINDINGS

The visitor economy is an engine for economic growth



Visitor Spending

In 2019, 211 million U.S. and international visitors spent a combined total of \$46 billion in Pennsylvania.



Growth continues

Visitor spending increased 2.8% in 2019 and has grown by 45% since 2009.



Employment Generator

Employment **directly** supported by visitor spending increased by 22,000 since 2015 to 333,100 in 2019. When indirect and induced employment figures are factored in, the industry-supported employment level totaled 521,100.



Fiscal Contributions

Visitors generated \$4.8 billion in state and local taxes, which is equivalent to \$950 in tax savings for every household in Pennsylvania.

VISITATION AND SPENDING

VISITOR SPENDING TRENDS

Continued growth in 2019

Growth in visitation and spending

Pennsylvania's travel and tourism industry continued its growth track in 2019. Visitation growth was led by both overnight and day-trip leisure visitors. Visitor spending was supported by growth in the number of visitors and, to a lesser extent, increased spending by travelers while on their PA trip.



Total visitation increased by 3.3 million U.S. and international visitors in 2019.

Growth was seen in both day and overnight visitation segments.



Visitor spending growth continued in 2019.

Visitor spending rose \$1.3 billion in 2019 to reach \$46.0 billion.



Increases in spending on recreational activities and food purchases supported overall growth.

Visitor spending on recreational activities increased by 4.7% in 2019, leading all categories.

VISITATION

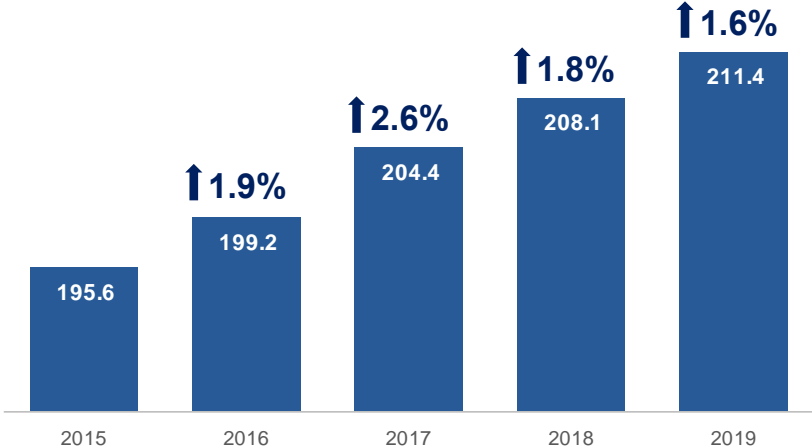
Total U.S. and international visitor count

Total (U.S. and international) visitation grew by 3.3 million visitors in 2019, reaching 211.4 million person-trips during the year to Pennsylvania destinations.

Visitation grew by 1.6% in 2019 and has grown by 8.1% since 2015—an increase of 15.8 million visits.

Lower gas prices and a healthy economy in 2019 helped push visitation higher. Increases in both overnight and day-trip visitation supported overall visitation growth.

Pennsylvania visitation levels (in millions)



Source: Longwoods International, Tourism Economics

SPENDING

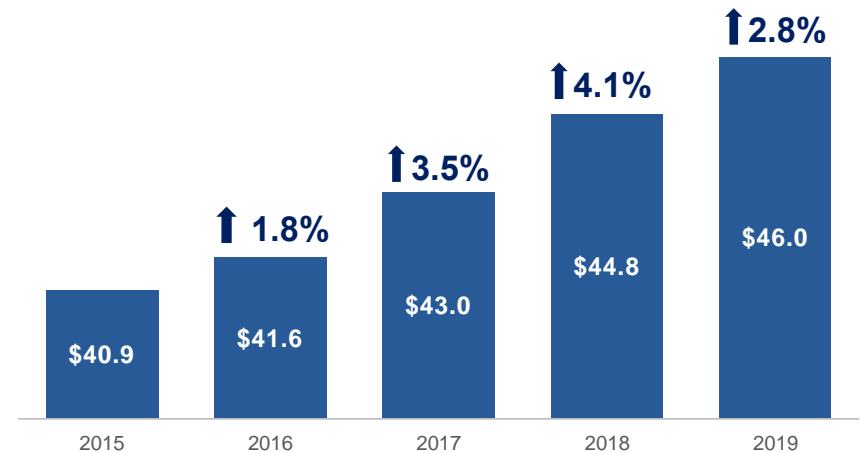
Total visitor spending

Spending in Pennsylvania by U.S. and international travelers grew 2.8% in 2019 to \$46.0 billion.

Visitor spending increased by \$1.3 billion in 2019 and has grown by \$5.2 billion since 2015, an overall increase of 12.7%.

With gas prices falling and minimal inflation from other key spending categories, the spending increase was largely driven by visitation growth.

Pennsylvania visitor spending (\$ billions)



Source: Longwoods International, Tourism Economics

SPENDING

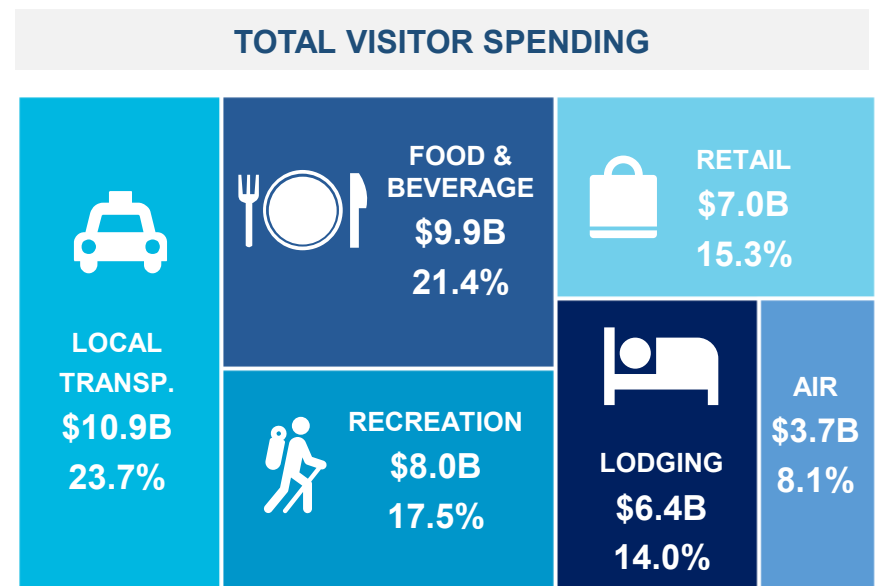
Spending by category, 2019

The **\$46.0 billion** spent by U.S. and international travelers to and within Pennsylvania in 2019 was spread across a wide range of sectors.

Of the \$46.0 billion spent in Pennsylvania in 2019 by visitors, 23.7% was spent on transportation in the state. Spending on food & beverages was close to \$10 billion—21.4% of the average visitor spend.

Visitors spent 17.5% on recreational activities, while the \$7.0 billion spent shopping (i.e., retail purchases) represented 15.3% of each visitor dollar.

Lodging expenditures accounted for 14% of each visitor dollar. This \$6.4 billion in spending includes both room rentals as well as 2nd home rental income.



Source: Longwoods International, Tourism Economics

SPENDING

Visitor spending timeline

Visitor spending has increased by \$5.2 billion since 2015.

Visitor spending on recreation, air transportation, and food & beverage purchases grew at the fastest rates in 2019, while spending on ground transportation costs was constrained by lower gasoline prices that allowed travelers to increase their spending on other travel-related categories.

Visitor spending on food & beverages grew by \$1.5 billion between 2015 and 2019, the strongest increase of any category. Recreational spending increased by more than \$1 billion over the same period.

While 2019's growth in lodging spending by visitors was slightly lower than overall spending growth, lodging spending has supported overall visitor spending growth over the past five years, increasing by an average of 3.9% annually.

Visitor Spending in Pennsylvania, 2015-2019

Amounts in millions of dollars

	2015	2016	2017	2018	2019	2019 Growth	2015-2019 CAGR
Total visitor spending	\$40,854	\$41,581	\$43,044	\$44,788	\$46,041	2.8%	3.0%
 Lodging*	\$5,528	\$5,737	\$5,948	\$6,281	\$6,445	2.6%	3.9%
 Food & beverages	\$8,399	\$8,622	\$8,999	\$9,514	\$9,860	3.6%	4.1%
 Retail	\$6,496	\$6,587	\$6,745	\$6,888	\$7,042	2.2%	2.0%
 Recreation	\$6,915	\$7,194	\$7,542	\$7,689	\$8,050	4.7%	3.9%
 Ground Transport	\$10,267	\$10,142	\$10,342	\$10,850	\$10,928	0.7%	1.6%
 Air Trans.	\$3,248	\$3,299	\$3,467	\$3,565	\$3,715	4.2%	3.4%

*Lodging Includes spending on hotel/motel room rentals and second home rental income. CAGR, or Compound Annual Growth Rate, is the mean annual growth over a specified period of time longer than one year.

Source: Longwoods International, Tourism Economics

SPENDING

Spending by category, in non-inflation dollars

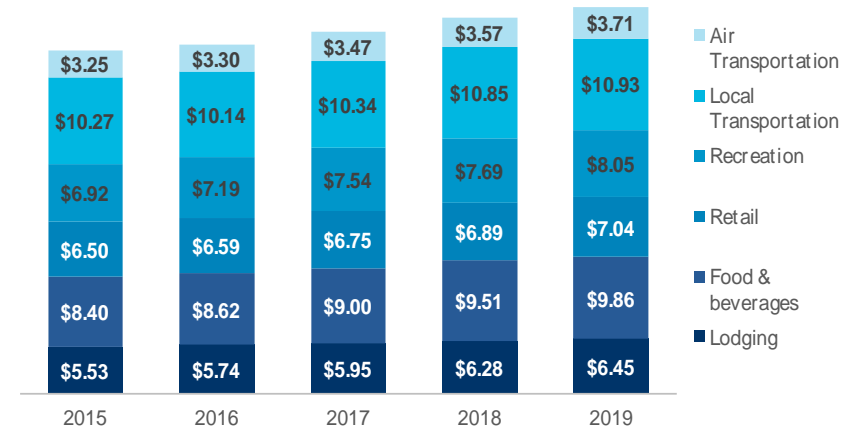
Visitor spending on recreational activities exceeded \$8.0 billion in 2019 and has grown by 16% overall since 2015, an increase of \$1.1 billion. Nearly a third of the increase in spending on recreational activities occurred in 2019.

Food & beverage spending in 2019 increased by \$350 million from 2018, and by 17% overall from 2015.

Shopping or spending on retail purchases was slightly over \$7 billion in 2019, a 2% increase from 2018 and 8% from 2015.

Spending on lodging increased by nearly \$1 billion, or 17%, since 2015.

Pennsylvania visitor spending (\$ billions)



Source: Tourism Economics

SPENDING

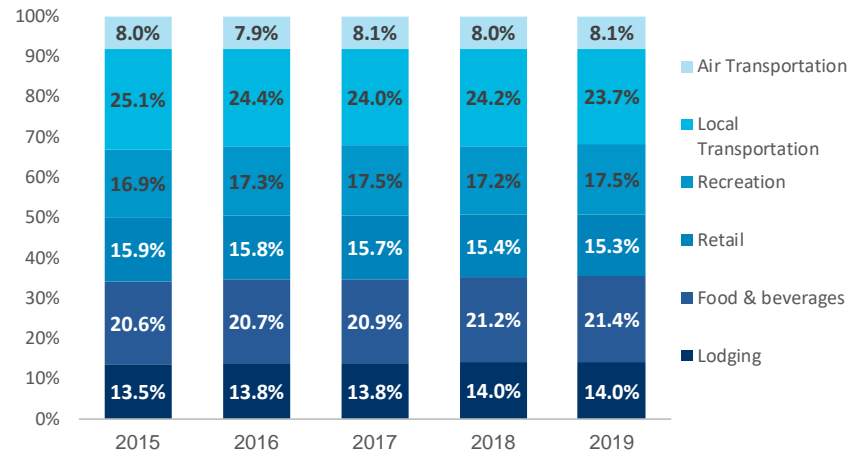
Spending by category, percent of category total

With the strong increase in spending on recreational activities over the last few years, the share of the visitor dollar spent at amusement and entertainment businesses grew from 16.9% in 2015 to 17.5% in 2019.

The share of the visitor dollar spent on lodging remained at prior year levels in 2019 at 14.0%.

The share of the visitor dollar spent on food & beverages is another category that has increased in importance as measured by its spending share, reaching 21.4% in 2019.

Pennsylvania visitor spending (shares)



Source: Tourism Economics

VISITATION AND SPENDING

Spending by overnight and day-trip travelers

While the number day-trip travelers was nearly double that of the overnight segment, average spending by overnight travelers was more than three times that of day-trip travelers on a per trip per traveler basis.

Spending in Pennsylvania by the estimated 75 million overnight travelers (as measured in person-trips) totaled more than \$29.3 billion in 2019.

Day-trip visitation grew to 136.5 million person-trips in 2019, with total expenditures exceeding \$16.7 billion.

Overnight visitors comprised about 35% the total visitor count in 2019, but their spending accounted for 64% of Pennsylvania's total visitor spending.

Average per-trip per traveler spending increases were seen for both the day-trip and overnight segments in 2019, with day-trip travelers increasing their average spending a bit more than their overnight counterparts.

Trips and spending, 2015-2019

Amounts in nominal dollars and number of visitors

	2015	2016	2017	2018	2019
Total visitors (millions)	195.6	199.2	204.4	208.1	211.4
Day	127.8	130.4	132.9	134.3	136.5
Overnight	67.8	68.8	71.4	73.8	74.9
Total traveler spending (millions)	\$40,854	\$41,581	\$43,044	\$44,788	\$46,041
Day	\$15,070	\$15,283	\$15,639	\$16,104	\$16,722
Overnight	\$25,784	\$26,298	\$27,405	\$28,684	\$29,319
Per traveler spending	\$209	\$209	\$211	\$215	\$218
Day	\$118	\$117	\$118	\$120	\$123
Overnight	\$380	\$382	\$384	\$389	\$391

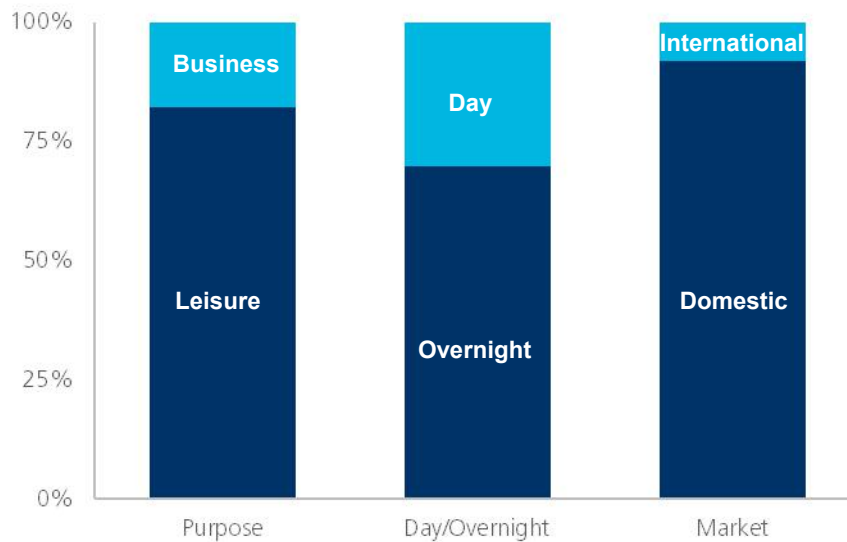
Source: Tourism Economics

SPENDING

Visitor spending by market

Spending share by market, 2019

Expressed as a percentage of total expenditure per market



Source: Tourism Economics

Pennsylvania spending by market

Amounts in millions of nominal dollars and percent of total

	Spending	% of total	Growth rate
Purpose	\$46,041		
Leisure	\$38,695	84%	3.4%
Business	\$7,346	16%	-0.3%
Stay	\$46,041		
Day	\$16,722	36%	3.8%
Overnight	\$29,319	64%	2.2%
Market	\$46,041		
Domestic	\$43,168	94%	3.0%
International	\$2,873	6%	-0.1%

Source: Tourism Economics

SPENDING

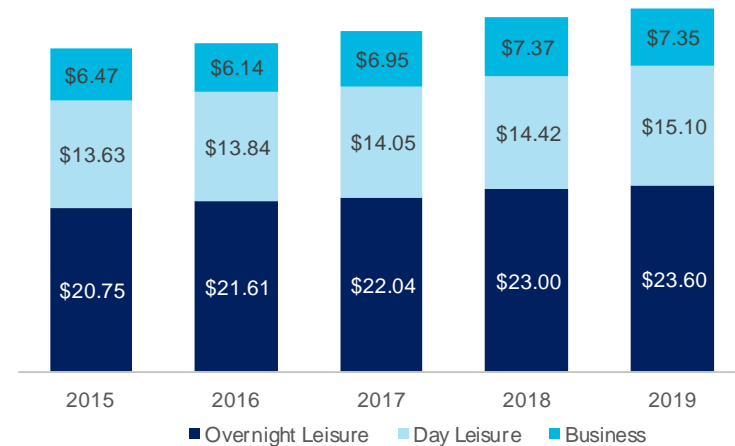
Visitor spending shares

Spending by Pennsylvania's day-trip travelers surpassed \$15 billion in 2019, increasing by 4.6% from 2018.

Spending by overnight leisure travelers reached \$23.6 billion in 2019, growing 14% from the segment's total spending level in 2015.

Business spending dipped slightly in 2019 but remains 13.5% higher than the segment's 2015 spending level.

Pennsylvania visitor spending by Market Segment
in \$U.S. billions



Source: Tourism Economics

PENNSYLVANIA'S U.S. TRAVEL & TOURISM MARKET

DOMESTIC ANALYSIS

Consumer survey information available for domestic visitors allows for a deeper analysis of Pennsylvania's domestic, or U.S., travel and tourism market. The following slides break out the size of certain domestic sectors along with the distribution of spending.

Note: The information in this section will, by definition, be different from that of other sectors. The information presented is limited to travelers from the U.S., including Pennsylvania, that have identified a Pennsylvania destination on their trip. By definition, the expenditures exclude that of international travelers, but also some spending categories that consumer surveys do not consider local (e.g., air travel).

Domestic visitors travelling to and within Pennsylvania totaled close to 210 million in 2019.

Of these travelers, an estimated 125 million took a leisure day-trip, representing 60% of the state's total domestic visitation.

Overnight leisure travelers comprised 30% of all domestic visitors, or 63.4 million.

Domestic business travelers totaled an estimated 16 million in 2019, with the remainder combined business-leisure visitors.

Spending by these visitors rose to \$45 billion, an increase of 4.1%. With visitation up 1.7%, it means that per-trip spending of Pennsylvania's domestic travelers grew 2.5% in 2019.

DOMESTIC TRAVELER SECTORS

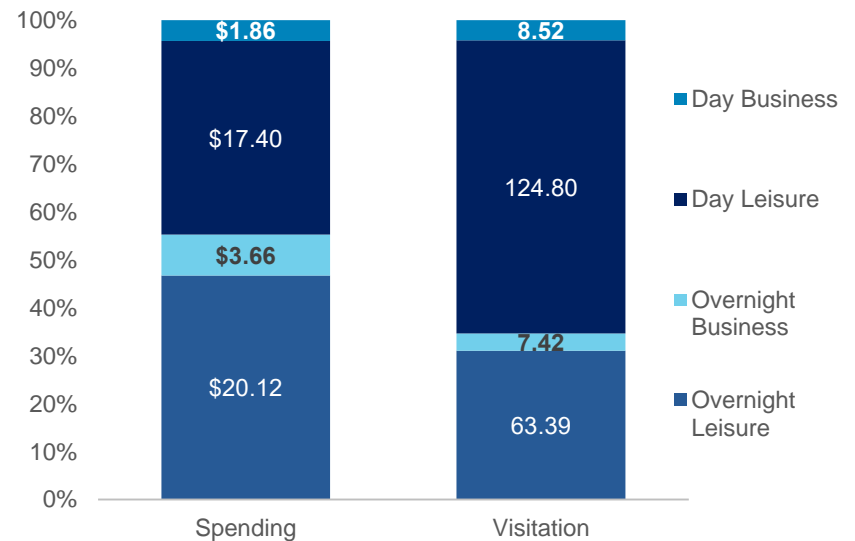
Domestic traveler types

Overall, the 70.8 million domestic overnight business and leisure travelers spent \$23.8 billion in Pennsylvania. These overnight travelers comprised close to 35% of all domestic travelers, but accounted for almost 55% of the state's total domestic visitor spending.

Day-trip leisure travelers comprised the largest domestic visitor sector and nearly 40% of all domestic visitor spending.

Pennsylvania domestic visitor spending and visitation

(Spending in billions, visitation in millions)



Source: Longwoods International, Tourism Economics
Excludes Business-Leisure travelers

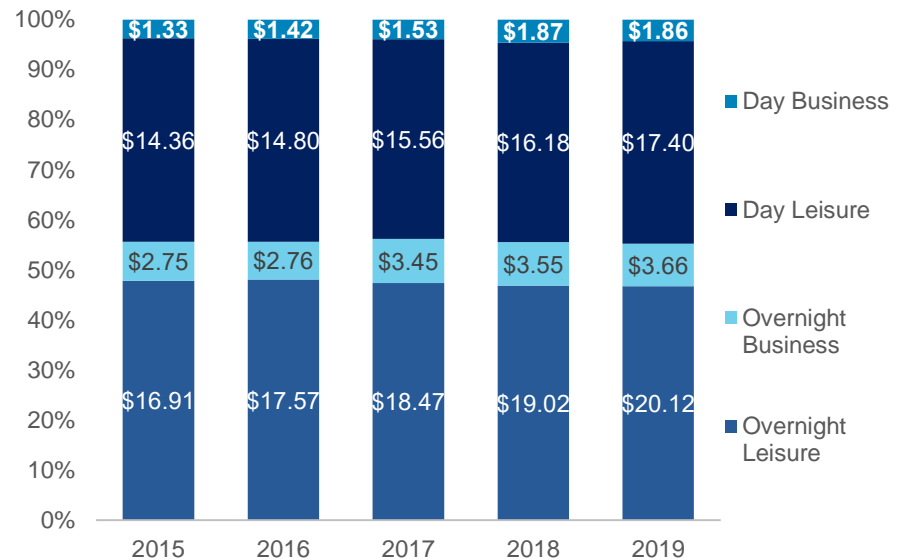
DOMESTIC TRAVELER SPENDING BY SECTOR

Timeline

Domestic spending grew by \$2.4 billion in 2019 with 95% of the spending growth coming from the leisure segments.

Domestic overnight leisure spending increased \$3.2 billion from 2015 to 2019, surpassing \$20 billion. The \$3.2 billion increase in spending leads all categories. Domestic day-trip leisure spending also increased – by more than \$3 billion, a 21% rate of growth since 2015.

Pennsylvania visitor spending (\$ millions)



Source: Tourism Economics
Excludes spending by business-leisure travelers

DOMESTIC OVERNIGHT LEISURE SECTOR

Overnight leisure spending by category

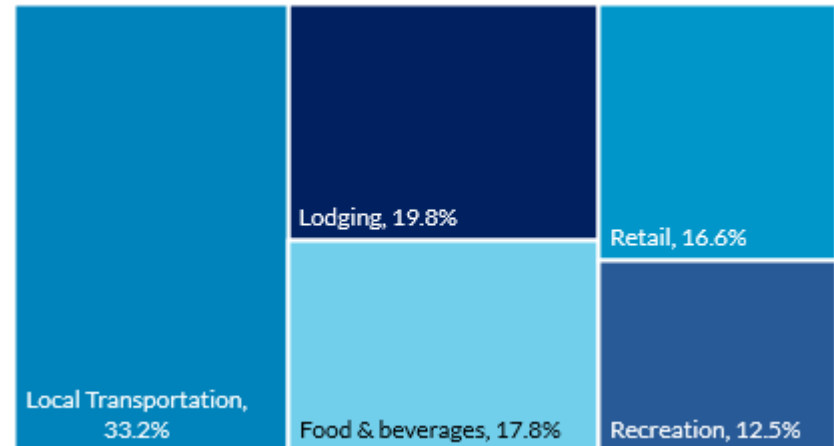
Pennsylvania hosted an estimated 63.4 million domestic overnight leisure travelers (as measured in person-trips) in 2019.

These visitors spent an estimated \$20.1 billion in the state.

Visitors spent, on average, \$317 on each trip with per-trip spending increasing by \$6 in 2019.

Top spending categories include transportation, food & beverages, and lodging.

DOMESTIC OVERNIGHT LEISURE VISITOR SPENDING



Source: Longwoods International, Tourism Economics

DOMESTIC OVERNIGHT BUSINESS SECTOR

Overnight business spending by category

Pennsylvania hosted an estimated 7.4 million overnight business travelers (as measured in person-trips) in 2019.

These visitors spent an estimated \$3.7 billion in total in 2019.

Each domestic overnight business traveler spent an average of \$493 per person per trip in 2019.

Nearly three-quarters of the total expenditures by overnight business travelers was spent on transportation and lodging in 2019.

DOMESTIC BUSINESS OVERNIGHT VISITOR SPENDING



Source: Longwoods International, Tourism Economics

DOMESTIC DAY-TRIP LEISURE SECTOR

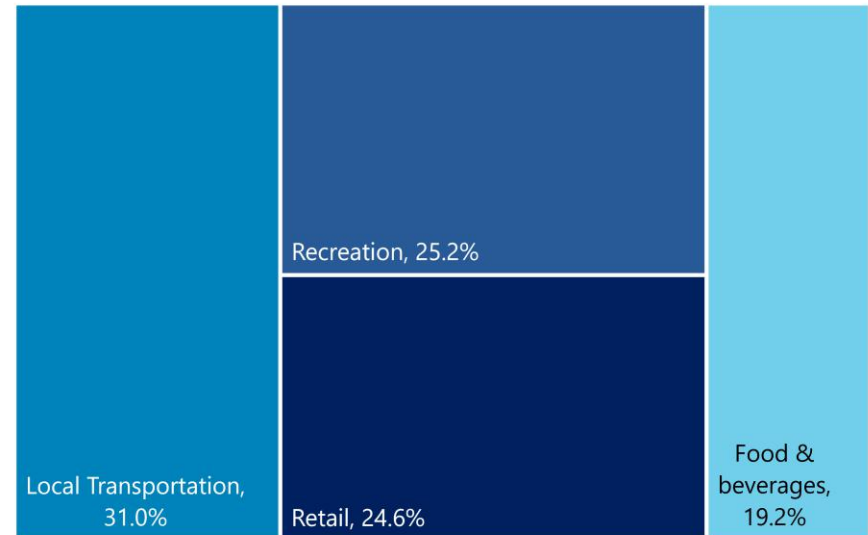
Day-trip leisure spending by category

Pennsylvania hosted an estimated 124.8 million domestic day-trip leisure travelers (as measured in person-trips) in 2019. These travelers to and within Pennsylvania spent an estimated \$17.4 billion in total in 2019.

Transportation costs accounted for 31% of spending by day-trip leisure travelers in 2019. Spending on recreational activities accounted for an additional one-fourth of day-trip leisure traveler spending, with roughly the same amount spent on shopping, i.e., retail purchases, while slightly under 20% was spent on food and beverages.

Each day-trip leisure traveler spent an average of \$139 per person per trip in Pennsylvania in 2019.

DOMESTIC DAY-TRIP LEISURE VISITOR SPENDING



Source: Longwoods International, Tourism Economics

DOMESTIC DAY SECTOR

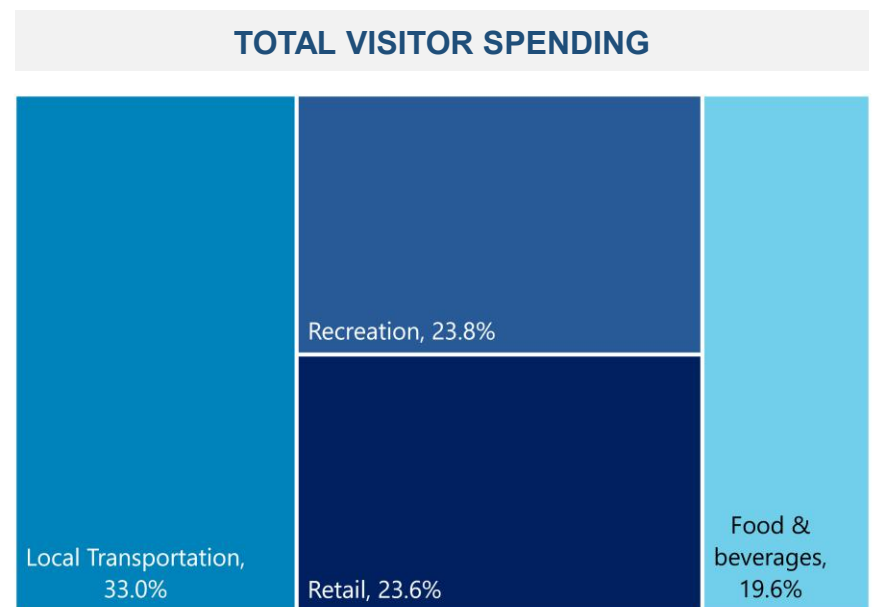
Day trip spend by category

The number of day person-trips to PA destinations rose to 133.3 million in 2019.

Day visitors to destinations within PA spent \$19.3 billion.

Each day visitor spent an average of \$144.

One-third of day travel spending by domestic visitors is spent on transportation. Recreational and retail both garner about 24% of each day traveler with spending on food & beverages the remaining 20%.



Source: Longwoods International, Tourism Economics

DOMESTIC TRAVELER SPENDING

Spending by visitor type and spending category

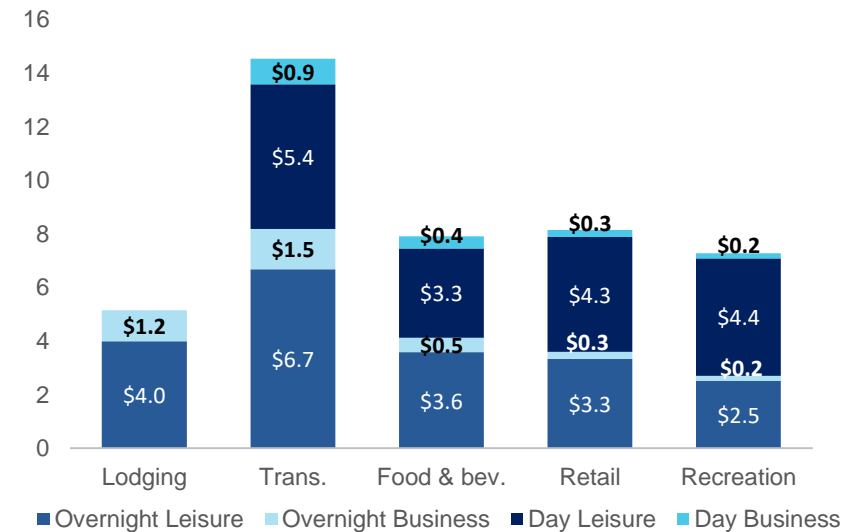
Domestic travelers spent more than \$8 billion in Pennsylvania's retail shops in 2019.

Of all domestic visitors, 31.1% are overnight leisure visitors; 45.3% of all domestic visitor food & beverage spending is by overnight leisure visitors.

The overnight business sector represented just 3.6% of total domestic visitation in 2019, but 22.5% of the state's domestic lodging expenditures.

Day-trip leisure travelers accounted for 60% of spending on recreational activities in 2019.

Pennsylvania visitor spending (\$ billions)



DIRECT IMPACTS

TRAVEL AND TOURISM INDUSTRY IMPACTS

The travel and tourism industry consists solely of visitor spending and its direct impacts on the state economy.

Travel- and tourism-related GDP (gross domestic product) is the value added by those sectors that directly interact with travelers.

The narrow definition of tourism industry includes just the industry's sales, excluding the sector's capital investments and the general government support of tourism. This definition is consistent with the nation's economic accounts.

On this basis, the travel and tourism industry's contribution to Pennsylvania's GDP totaled \$19.3 billion in 2019, with the industry's employment level reaching 333,100, which was equal to 4.2% of total Pennsylvania employment in 2019.

Core tourism

Amounts in number of jobs and millions of nominal dollars

	Employment	GDP (millions)
Total	333,068	\$19,274
Food & Beverage	125,585	\$4,322
Lodging	61,017	\$4,119
Recreation and Entertainment	50,406	\$2,971
Retail Trade	33,735	\$1,653
Other Transport	29,314	\$2,063
Air Transport	10,576	\$2,087
Gasoline Stations	8,208	\$291
Personal Services	7,625	\$396
Finance, Insurance, & Real Estate	5,361	\$1,268
Business Services	1,240	\$104

Source: Tourism Economics

DIRECT TRAVEL AND TOURISM INDUSTRY

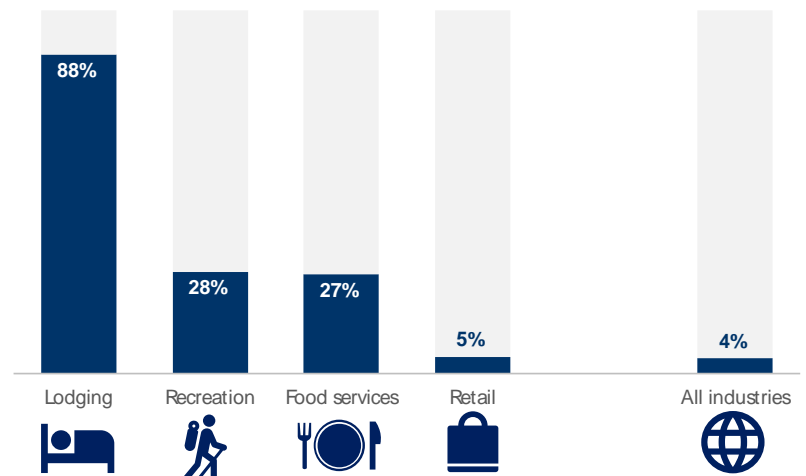
Travel and tourism industry employment intensity

Travel and tourism is directly responsible for employing close to 333,100 in a variety of industry sectors.

Travel and tourism is responsible for almost 90% of employment in the state's lodging sector and close to 30% of employment in the recreation and food services industries.

Even persons employed in the state's retail industry rely on travel and tourism for employment.

Travel and tourism industry employment intensity
Amounts in percentage of Pennsylvania's total industry employment, 2019



DIRECT TRAVEL AND TOURISM INDUSTRY

Travel and tourism industry employment growth

Visitor spending directly supported 333,100 jobs.

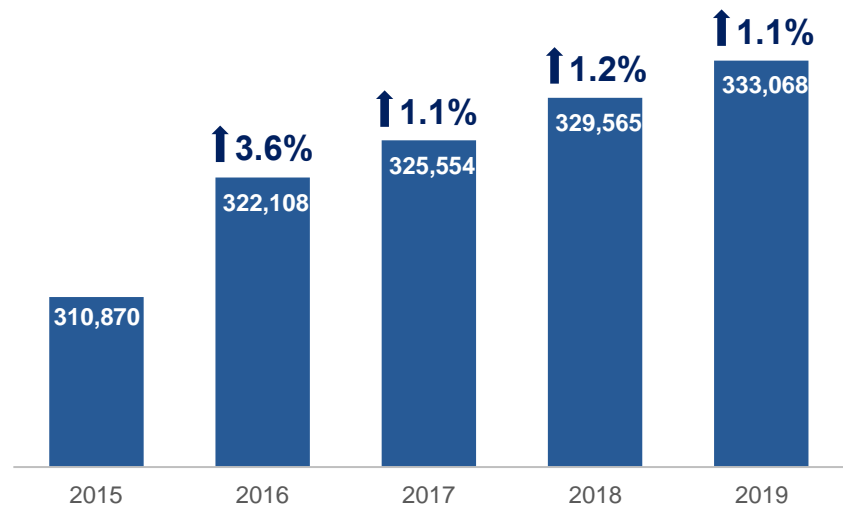
The number of jobs directly supported by travel and tourism increased by 3,500 jobs in 2019, or by 1.1%.

The 333,100 employment level represents 4.2% of all jobs in Pennsylvania and equates to 1 out of every 24 jobs.

Direct travel and tourism employment grew by more than 22,000 between 2015 and 2019.

Travel and tourism supported employment

Employment Number and Year-Over-Year percentage growth



Source: Tourism Economics

DIRECT TRAVEL AND TOURISM INDUSTRY

Ranking of travel and tourism industry employment

In 2019, the travel and tourism industry was the 11th largest employer in Pennsylvania.

Spending by travelers and tourists directly supported 333,100 jobs in Pennsylvania in 2019. Comparing this with the direct employment in other industry sectors, tourism would rank as the 11th largest industry.

(Note: Travel and tourism does not have an official NAICS “industry code,” but is responsible for a portion of jobs for industries with specified codes (e.g., accommodation and food services, retail trade, transportation, etc.).

PA Employment Directly Supported by Travel and Tourism
333,100

Employment in Pennsylvania, by major industry, 2019

1	Health care and social assistance	1,152,000
2	Retail Trade*	748,800
3	Manufacturing	605,200
4	Professional, scientific, and technical services	540,800
5	Accommodation and food services*	518,300
6	Other services, except public administration	438,200
7	Finance and insurance	430,400
8	Administrative and waste management services	406,400
9	Construction	402,200
10	Transportation and warehousing	390,400
11	Real estate and rental and leasing	327,100
12	Educational services	312,600
13	Wholesale trade	238,900
14	Arts, entertainment, and recreation*	183,400

Source: Tourism Economics, U.S. Bureau of Economic Analysis

*A portion of employment is also included in travel and tourism employment figure.

PENNSYLVANIA'S TRAVEL AND TOURISM ECONOMY

Travel Economy Impact vs. Travel Industry Impact

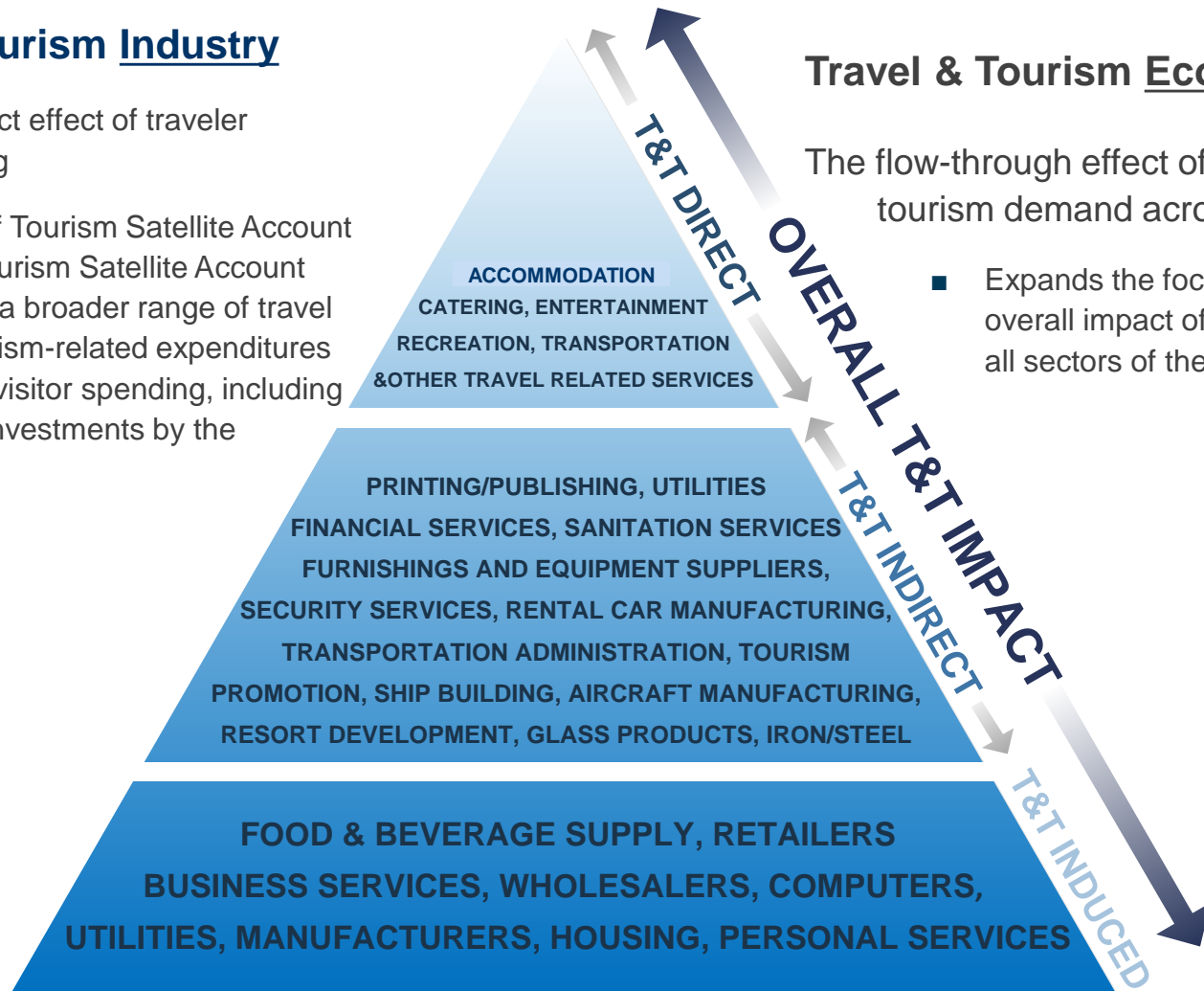
Travel & Tourism Industry

- The direct effect of traveler spending
- Focus of Tourism Satellite Account - The Tourism Satellite Account looks at a broader range of travel and tourism-related expenditures beyond visitor spending, including capital investments by the industry.

Travel & Tourism Economy

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

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



TOURISM SATELLITE ACCOUNT

Pennsylvania's travel and tourism economy

The primary and direct impact of travel and tourism is driven by sales made to travelers. Measuring sales allows for apples-to-apples comparisons with other industries.

The total direct economic impact of the travel and tourism industry as measured by the Tourism Satellite Account includes: traveler spending, capital investment in travel-related facilities and businesses; non-travel private consumption expenditures (PCE); and government support.

Non-visitor private consumption expenditures (PCE) represent travel and tourism-related consumer durable goods purchases, such as an RV, boat, or furniture for a vacation home.

Government support for tourism includes the budgets for destination marketing and other budget items in broad support of the travel and tourism industry.

Capital investment (CAPEX) includes construction of hotels and attractions, as well as tourism equipment and infrastructure.

TOURISM SATELLITE ACCOUNT

Pennsylvania's travel and tourism economy

The primary and direct impact of travel and tourism is largely driven by sales made to travelers, especially domestic travelers who account for the vast majority of visitors to and within Pennsylvania.

The total direct economic impact of the travel and tourism industry as measured by the Tourism Satellite reached just under \$50 billion in 2019, a 2.7% from 2018 and just below the 3.2% average annual rate of growth for the years 2015-2019.

While small compared to the other categories, non-visitor private consumption expenditures (PCE) and government support for the industry showed the strongest rates of increase – both from 2018 and for the 2015-2019 period.

Travel and tourism economy spending, 2015-2019

Amounts in millions of dollars

	<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>2018</u>	<u>2019</u>	<u>2019 Increase</u>	<u>2015-2019 CAGR</u>
Domestic Travel Spending	\$38,134	\$38,783	\$40,164	\$41,912	\$43,085	2.8%	3.1%
International Traveler Spend	\$2,720	\$2,798	\$2,880	\$2,876	\$2,956	2.8%	2.1%
Non-Visitor PCE	\$207	\$257	\$273	\$285	\$299	4.7%	9.6%
Government Support	\$193	\$212	\$233	\$254	\$266	4.9%	8.3%
Capital Investment	\$1,941	\$1,589	\$2,161	\$2,376	\$2,366	-0.4%	5.1%
Total	\$43,195	\$43,640	\$45,710	\$47,704	\$48,972	2.7%	3.2%

TOURISM SATELLITE ACCOUNT

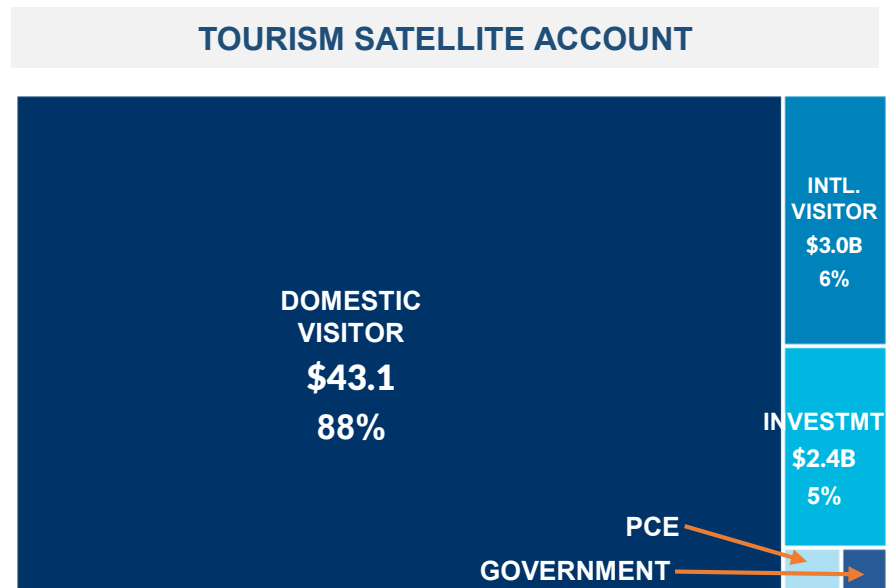
Category contributions, 2019

The total direct contribution of travel and tourism to the Pennsylvania economy reached \$48.9 billion in 2019.

The \$43.1 billion in spending by U.S.(domestic) travelers provided the major direct impact, i.e., 88% of the state total.

Investment spending contributed \$2.4 billion, or 5%, and international visitors and their \$3.0 billion in spending accounted for 6% of the state total in 2019.

Non-visitor private consumption expenditures (PCE) represent travel-related consumer durable goods purchases, such as an RV, boat, or furniture for a vacation home and totaled \$299 million in 2019, while governmental support equaled \$240 million. Together, they accounted for 1.1% of the total.



Source: Tourism Economics

TOURISM SATELLITE ACCOUNT

Travel- and tourism-related capital investments

\$2.4 billion was spent on capital construction projects in support of Pennsylvania’s travel and tourism industry in 2019.

Spending on machinery & equipment reached nearly \$1.1 billion in 2019, an increase of 2.7%.

New construction plateaued in 2019 at just below \$1.3 billion, a 3% decrease from 2018. Nevertheless, new travel- and tourism-related construction spending grew at an annual average rate of 7% between 2015 and 2019.

Travel- and tourism-related capital investments, 2015-2019
Amounts in millions of dollars

	<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>2018</u>	<u>2019</u>	<u>2019 Increase</u>	<u>2015-2019 CAGR</u>
Construction	\$975	\$606	\$1,145	\$1,318	\$1,279	-3.0%	7.0%
Machinery & Equipment	\$965	\$983	\$1,016	\$1,058	\$1,086	2.7%	3.0%
Total	\$1,941	\$1,589	\$2,161	\$2,376	\$2,366	-0.4%	5.1%

Source: Dodge Construction; Tourism Economics

ECONOMIC IMPACTS



ECONOMIC IMPACTS

How traveler spending generates employment and income

The analysis of travel and tourism's impact on Pennsylvania begins with the actual expenditures made by travelers, but also considers the downstream effects of this spending on the local economy. To estimate the total economic impact of tourism in Pennsylvania, visitor spending is input into a model of the state's economy created in IMPLAN. This results in the generation of three distinct types of impact: direct, indirect, and induced.

The estimated impacts on business sales, jobs, wages, and taxes are calculated for all three levels of impact.

- 1. Direct Impacts:** Visitors create direct economic value within a discrete group of sectors (e.g., recreation, lodging, transportation). This supports a relative proportion of jobs, wages, taxes, and GDP within each sector.
- 2. Indirect Impacts:** Each directly affected sector also purchases goods and services as inputs (e.g. food wholesalers, utilities, various services) into production. These impacts are indirect impacts.
- 3. Induced Impacts:** Lastly, the induced impact is generated when employees whose wages are generated either directly or indirectly by visitors, spend those wages in the local economy.

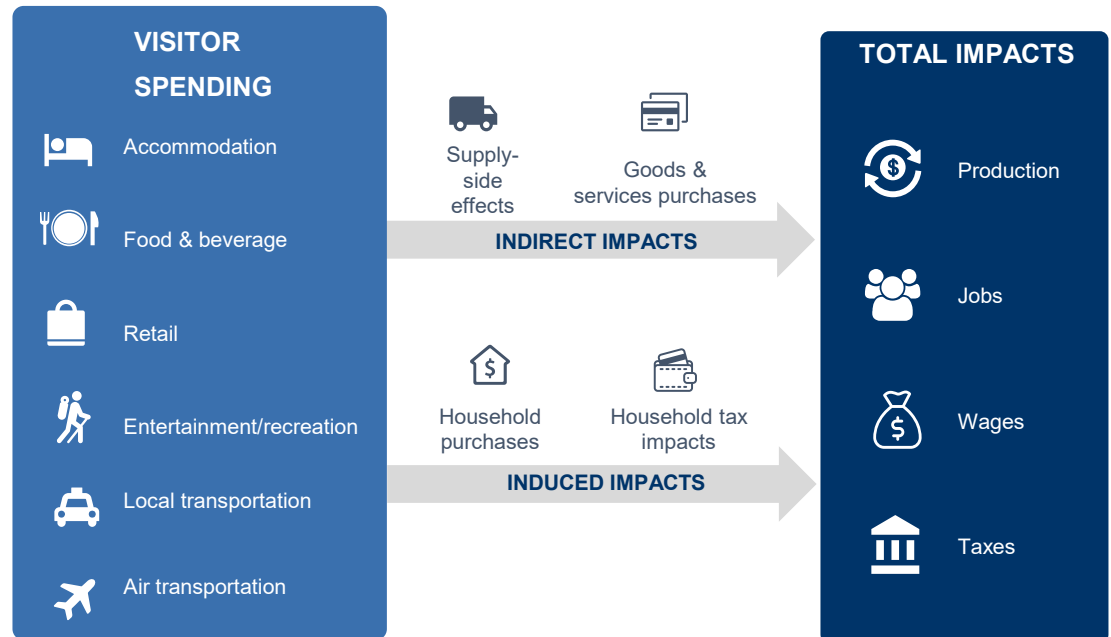
ECONOMIC IMPACTS

How visitor spending generates employment and income

Economic impact flowchart

IMPLAN calculates the estimated direct, indirect, and induced impact of travel and tourism for a broad set of indicators. These include the following:

- Spending
- Wages
- Employment
- Federal Taxes
- State Taxes
- Local Taxes



ECONOMIC IMPACTS

Sales by industry

Spending in support of visitor activity reached **\$49 billion in Pennsylvania in 2019**. This supported a total of **\$80 billion in business sales** when indirect and induced impacts are considered.

Summary economic impacts (\$ billions)



Sales impacts by industry, 2019

Amounts in millions of current dollars	Direct sales	Indirect sales	Induced sales	Total sales
Total, all industries	\$48,972	\$14,501	\$16,231	\$79,703
By industry				
Retail Trade	\$9,097	\$210	\$1,114	\$10,421
Food & Beverage	\$7,946	\$280	\$1,018	\$9,243
Finance, Insurance and Real Estate	\$814	\$3,543	\$4,884	\$9,242
Recreation and Entertainment	\$7,417	\$362	\$330	\$8,109
Gasoline Stations	\$6,672	\$17	\$59	\$6,748
Lodging	\$6,514	\$11	\$13	\$6,538
Business Services	\$253	\$3,611	\$1,417	\$5,280
Other Transport	\$3,330	\$1,335	\$473	\$5,138
Construction and Utilities	\$2,366	\$1,012	\$574	\$3,953
Air Transport	\$3,715	\$65	\$89	\$3,869
Education and Health Care		\$33	\$3,040	\$3,074
Manufacturing	\$90	\$1,358	\$749	\$2,196
Communications		\$1,030	\$809	\$1,839
Personal Services	\$393	\$337	\$680	\$1,410
Wholesale Trade		\$633	\$657	\$1,290
Government	\$367	\$408	\$235	\$1,009
Agriculture, Fishing, Mining		\$255	\$90	\$345

Source: IMPLAN, Tourism Economics

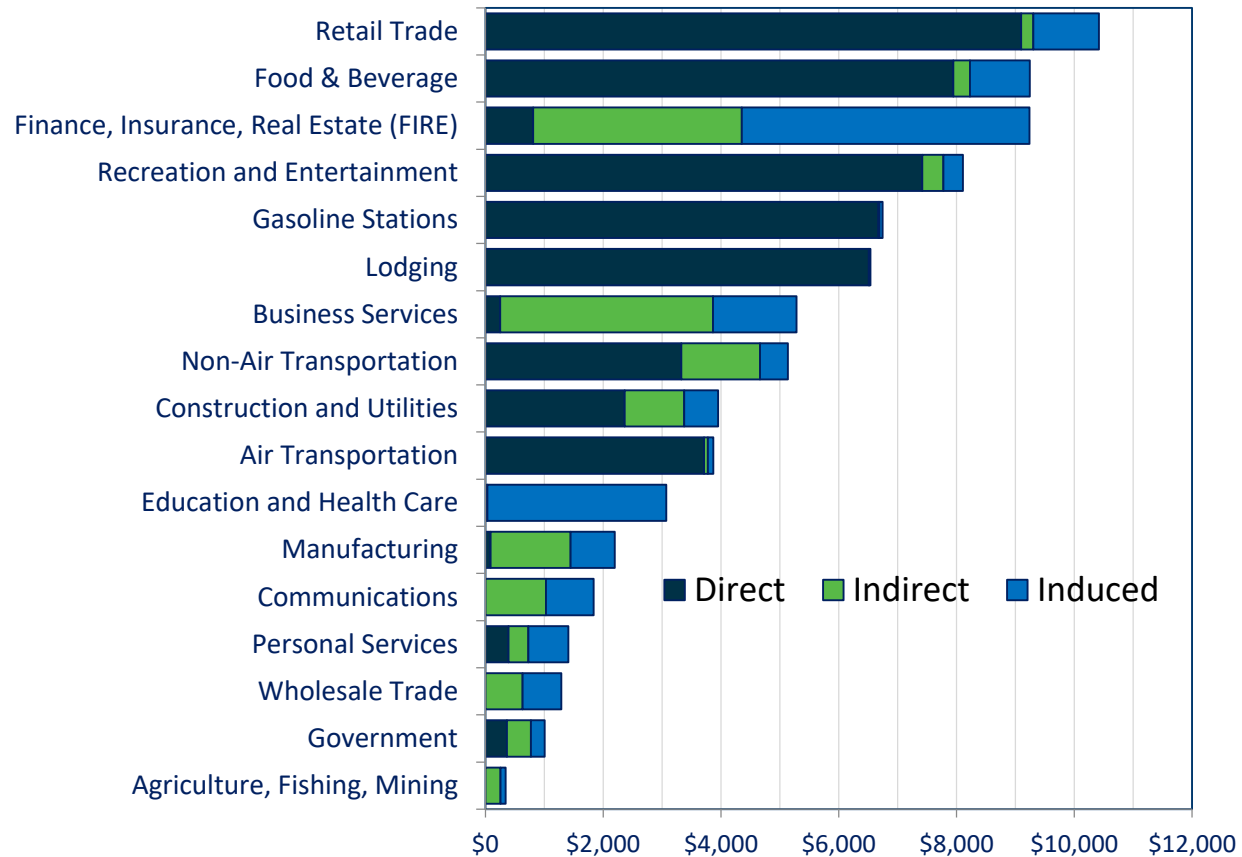
ECONOMIC IMPACTS

On business sales by industry

Impact on Business Sales by Industry, 2019
(in millions of U.S. dollars)

While the majority of sales are in industries directly serving the traveling public, \$3.6 billion in sales for the business services industry (indirect impact) was the result of sales of their services to travel- and tourism-related businesses.

Significant benefits also accrue in a wide variety of economic sectors including finance, insurance, and real estate (FIRE), education & health care, manufacturing, and communications from selling to tourism-related businesses and employees.



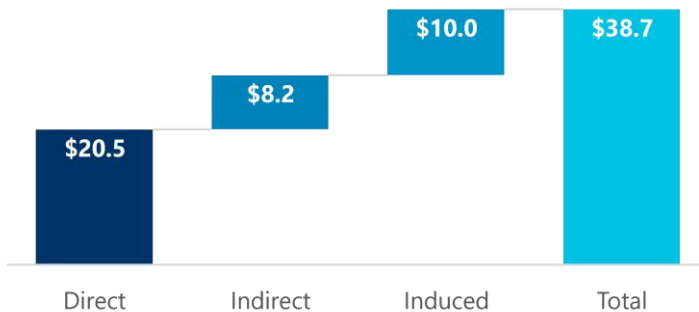
Source: IMPLAN, Tourism Economics

ECONOMIC IMPACTS

On Pennsylvania's Gross Domestic Product (GDP)

Travel and tourism generated **\$38.7 billion** in local GDP in 2019, or 4.8% of the Pennsylvania total. *Note: This excludes all import leakages to estimate the economic value generated by traveler activity in the state.*

Summary GDP impacts (\$ billions)



Impacts on Pennsylvania GDP by industry, 2019

Amounts in millions of current dollars	Direct value	Indirect value	Induced value	Total value
Total, all industries	\$20,452	\$8,219	\$9,988	\$38,658
By industry				
Finance, Insurance and Real Estate	\$1,268	\$1,927	\$3,170	\$6,365
Food & Beverage	\$4,322	\$239	\$573	\$5,134
Lodging	\$4,119	\$7	\$9	\$4,136
Business Services	\$104	\$2,548	\$934	\$3,587
Recreation and Entertainment	\$2,971	\$126	\$148	\$3,245
Other Transport	\$2,063	\$540	\$188	\$2,791
Retail Trade	\$1,653	\$98	\$898	\$2,649
Air Transport	\$2,087	\$20	\$31	\$2,137
Education and Health Care		\$16	\$1,982	\$1,998
Construction and Utilities	\$914	\$549	\$299	\$1,762
Personal Services	\$396	\$300	\$427	\$1,123
Wholesale Trade		\$484	\$527	\$1,011
Communications		\$638	\$335	\$973
Manufacturing	\$25	\$384	\$263	\$672
Government	\$238	\$241	\$108	\$586
Gasoline Stations	\$291	\$8	\$62	\$361
Agriculture, Fishing, Mining		\$94	\$35	\$129

Source: IMPLAN, Tourism Economics

ECONOMIC IMPACTS

On Pennsylvania's Gross Domestic Product (GDP)

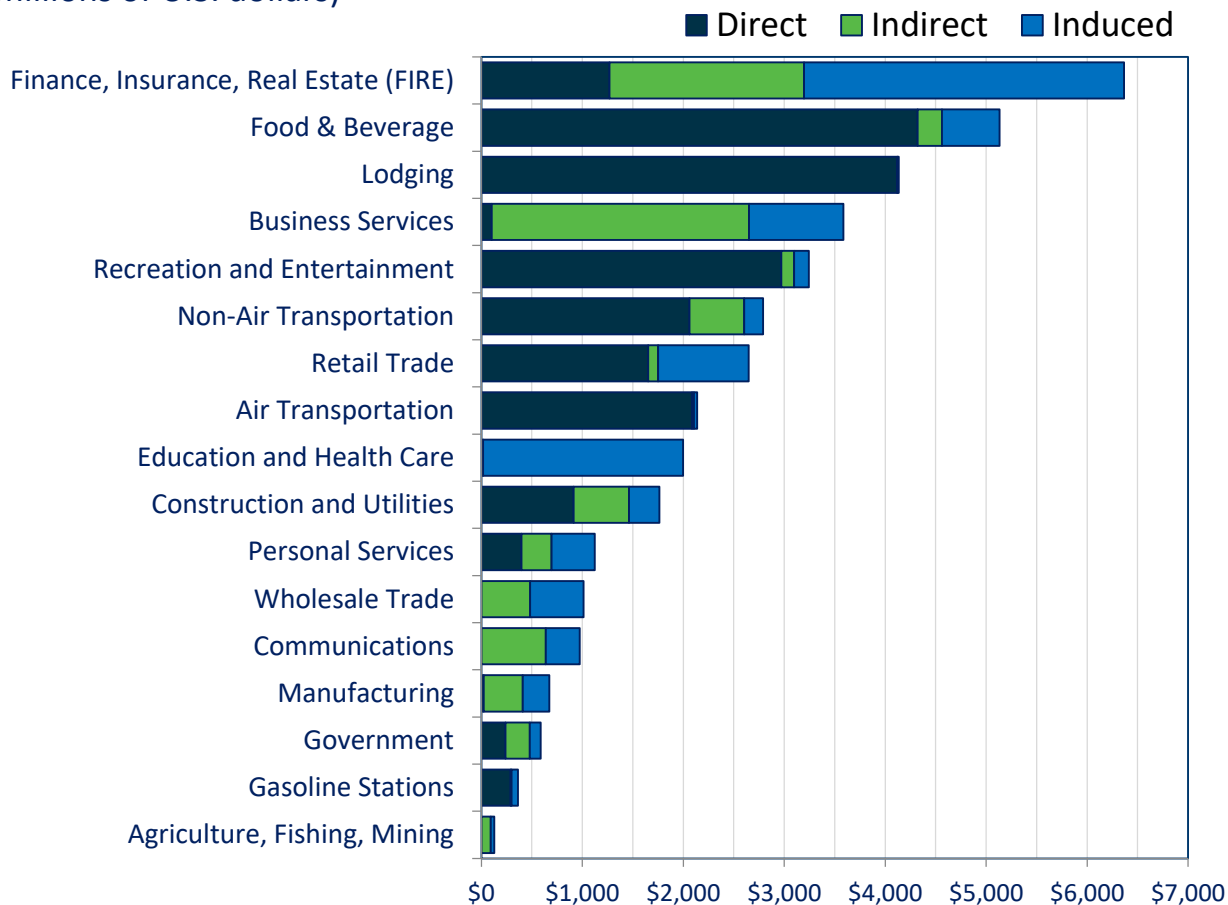
Impact on Pennsylvania GDP by Industry, 2019

(in millions of U.S. dollars)

The Food & Beverage, Lodging, and Recreation and Entertainment industries had the largest **direct** impact on Pennsylvania's GDP derived from travel and tourism in 2019.

In terms of the **total** impact on Pennsylvania's GDP from travel and tourism, the Finance, Insurance & Real Estate (FIRE) industry had the greatest impact at close to \$6.5 billion in 2019, with the industry's largest impacts being induced and indirect.

The Business Services industry ranked 4th in its contribution to the state's GDP in 2019 and, in the same manner as the FIRE industry, with much of the total impact generated from the indirect and induced impacts that were supported by traveler activity.



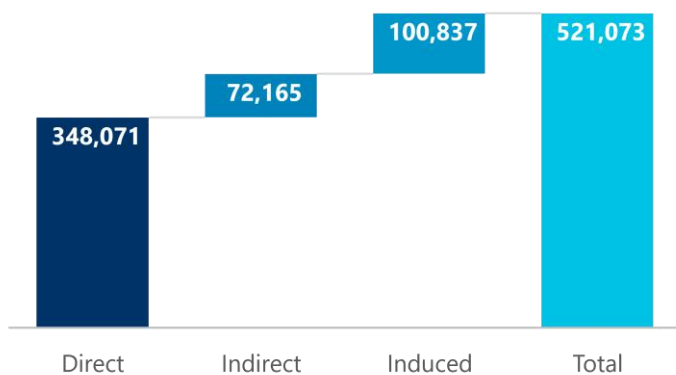
Source: IMPLAN, Tourism Economics

ECONOMIC IMPACTS

On Pennsylvania employment

Pennsylvania's travel and tourism industry supported close to 521,100 jobs in total in 2019 when indirect and induced impacts are included. This employment level represented 6.6% of all jobs in the state—or one out of every 15 jobs.

Summary employment impacts (number of jobs)



Employment Impacts

Amounts in total employment	Direct jobs	Indirect jobs	Induced jobs	Total jobs
Total, all industries	348,071	72,165	100,837	521,073
By industry				
Food & Beverage	125,585	6,214	14,085	145,884
Lodging	61,017	98	132	61,247
Recreation and Entertainment	50,406	3,574	3,303	57,283
Retail Trade	33,735	1,430	13,787	48,953
Other Transport	29,314	7,186	3,062	39,562
Business Services	1,240	24,822	9,494	35,556
FIRE*	5,361	11,099	11,499	27,959
Education and Health Care		446	26,951	27,397
Personal Services	7,625	4,025	9,246	20,896
Construction and Utilities	11,566	2,090	1,112	14,767
Air Transport	10,576	112	175	10,862
Gasoline Stations	8,208	130	871	9,210
Government	3,160	2,465	1,105	6,730
Wholesale Trade		2,368	2,511	4,879
Manufacturing	277	2,707	1,467	4,450
Communications		2,592	1,442	4,033
Agriculture, Fishing, Mining		807	596	1,404

Source: IMPLAN, Tourism Economics

ECONOMIC IMPACTS

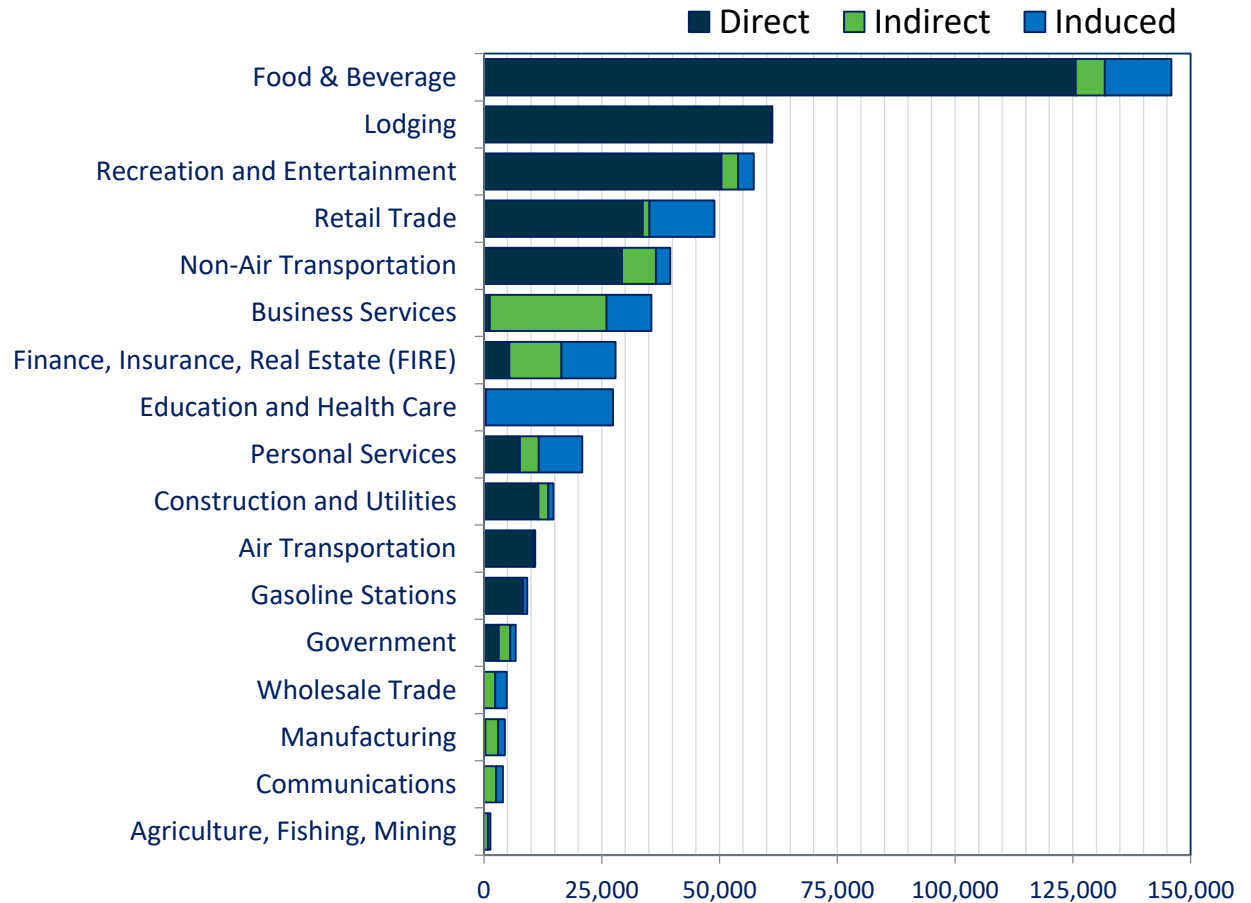
On Pennsylvania employment

Impact on Pennsylvania Employment by Industry, 2019

Over 72,200 Pennsylvania jobs were indirectly supported by traveler activity, with employment from the induced impact totaling close to 101,000.

Traveler spending supported the largest number of jobs in the Pennsylvania's Food & Beverage industry in 2019 at close to 146,000 in total from the direct, indirect, and induced impacts. The majority of those jobs were directly supported by visitor activity.

Almost all the employment in the Lodging and Air Transportation industries were directly supported by travel and tourism.



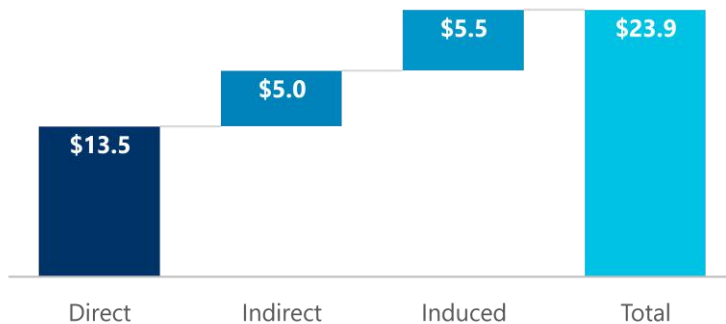
Source: IMPLAN, Tourism Economics

ECONOMIC IMPACTS

On personal income

Pennsylvania's travel and tourism industry generated \$13.5 billion in direct personal income and \$23.9 billion in total with the indirect and induced impacts.

Summary of personal income impacts (\$ billions)



Impacts on personal income, 2019

Amounts in millions of current dollars	Direct income	Indirect income	Induced income	Total income
Total, all industries	\$13,457	\$4,984	\$5,453	\$23,895
By industry				
Food & Beverage	\$3,017	\$156	\$384	\$3,558
Business Services	\$74	\$1,874	\$695	\$2,644
Other Transport	\$1,901	\$483	\$163	\$2,546
Lodging	\$2,490	\$4	\$5	\$2,499
Recreation and Entertainment	\$1,827	\$98	\$103	\$2,028
Finance, Insurance and Real Estate	\$450	\$665	\$804	\$1,919
Education and Health Care		\$12	\$1,641	\$1,653
Retail Trade	\$919	\$54	\$477	\$1,450
Air Transport	\$1,284	\$14	\$22	\$1,320
Construction and Utilities	\$737	\$244	\$133	\$1,114
Personal Services	\$274	\$198	\$324	\$795
Communications		\$458	\$184	\$642
Government	\$207	\$228	\$93	\$528
Wholesale Trade		\$229	\$255	\$484
Manufacturing	\$20	\$221	\$124	\$365
Gasoline Stations	\$256	\$4	\$28	\$288
Agriculture, Fishing, Mining		\$44	\$18	\$62

Source: IMPLAN, Tourism Economics

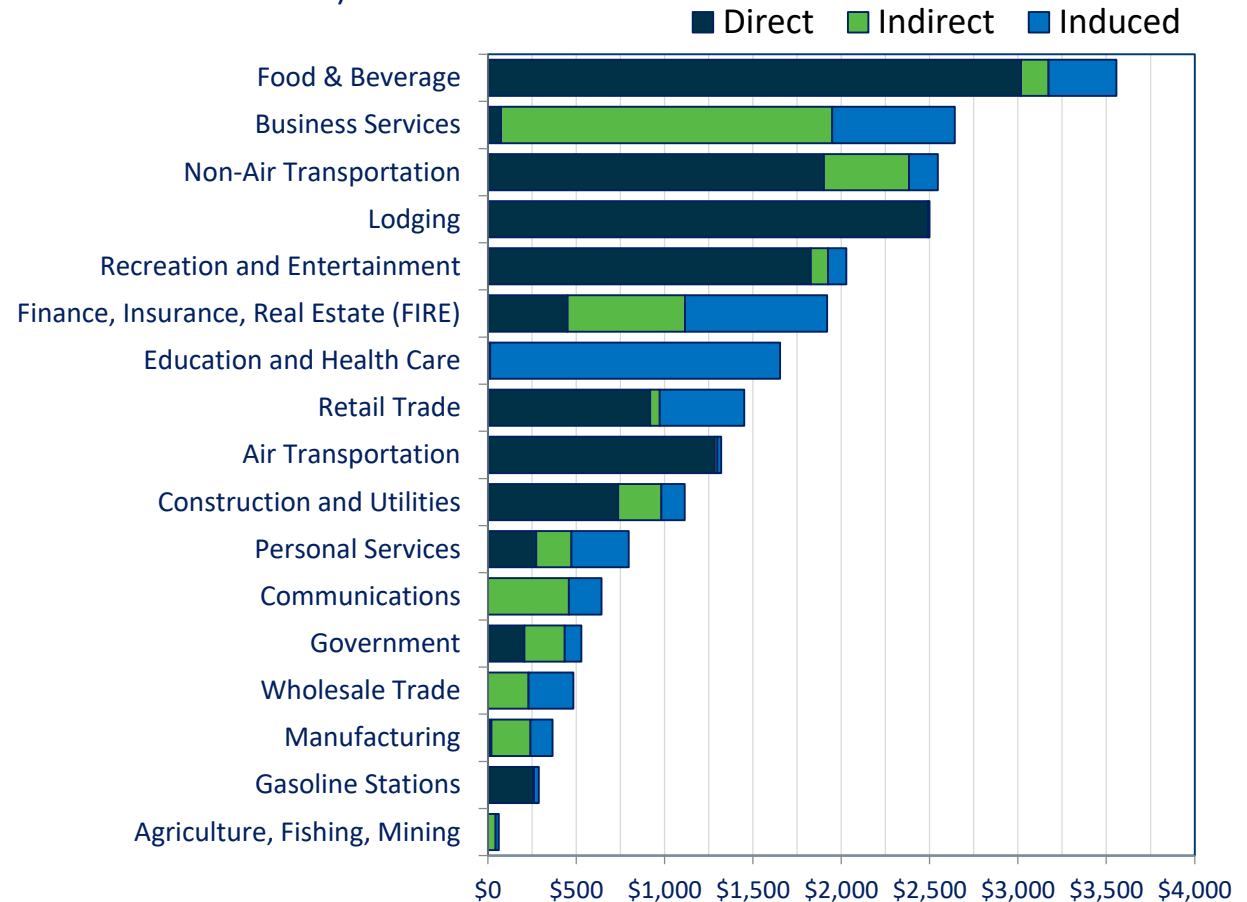
ECONOMIC IMPACTS

On personal income

There are ten industries where travel and tourism supported more than \$1 billion in total personal income in 2019. These range from the Food & Beverage and Lodging industries that to a large extent directly interact with the traveling public, to the less obvious—Business Services and Education & Health Care industries.

Despite ranking sixth in terms of employment supported by travel and tourism, the higher wages in the Business Services industry provided over \$2.6 billion in total personal income, the second highest amount when all three impacts are factored in.

Impact on Personal Income by Industry, 2019
(in millions of U.S. dollars)



Source: IMPLAN, Tourism Economics

ECONOMIC IMPACTS

On tax revenues

Traveler spending, travel-supported jobs, and business sales generated well over \$10 billion in tax revenues for the federal, state, and local government.

Pennsylvania's travel and tourism industry generated more than \$4.8 billion for the state and local governments in 2019.

Each household in Pennsylvania would need to be taxed an additional \$950 per year to replace the taxes derived from travel and tourism.

Tax Revenues Generated by Travel and Tourism, 2015 - 2019
(in millions of U.S. dollars)

Tax Type	2015	2016	2017	2018	2019	% Change
Federal Taxes	\$4,499.5	\$4,637.3	\$4,801.1	\$5,012.9	\$5,235.3	4.4%
Corporate	431.4	484.1	501.1	548.6	572.7	4.4%
Indirect Business	410.5	409.6	414.6	421.5	440.0	4.4%
Personal Income	1,341.1	1,407.5	1,453.5	1,539.5	1,608.0	4.4%
Social Insurance	2,316.5	2,336.0	2,431.9	2,503.2	2,614.6	4.5%
State and Local Taxes	\$4,366.5	\$4,409.7	\$4,516.9	\$4,644.7	\$4,809.5	3.5%
Corporate	283.0	259.4	254.3	235.1	246.0	4.6%
Personal Income	421.1	435.8	455.7	481.1	493.4	2.6%
Sales	1,595.9	1,611.3	1,650.1	1,697.2	1,742.6	2.7%
Hotel Occupancy	170.4	183.4	200.2	217.8	227.4	4.4%
Property	1,259.5	1,317.7	1,350.4	1,424.1	1,484.8	4.3%
Excise and Fees	599.9	567.6	570.3	554.8	579.2	4.4%
PA Unemployment	36.6	34.5	35.9	34.6	36.1	4.3%
TOTAL	\$8,866.1	\$9,047.0	\$9,318.0	\$9,657.5	\$10,045	4.0%

ECONOMIC IMPACTS

On state and local tax revenues

Traveler spending, travel-supported jobs, and business sales generated close to \$2.6 billion in state tax revenues and well over \$2.2 billion for Pennsylvania’s local governments.

At the state level, the 6% sales tax provided the largest proportion of governmental revenues totaling \$1.6 billion in 2019.

For local governments, property taxes along with fees, the local room tax, and sales taxes provided the majority of governmental revenues in 2019.

State & local tax impacts

Amounts in millions of nominal dollars

	State	Local
Tax Revenues	\$2,567	\$2,242
Sales	\$1,617	\$125
Bed tax	\$0	\$227
Personal income	\$351	\$142
Corporate	\$246	\$0
Social insurance	\$36	\$0
Excise and fees	\$313	\$266
Property	\$0	\$1,481

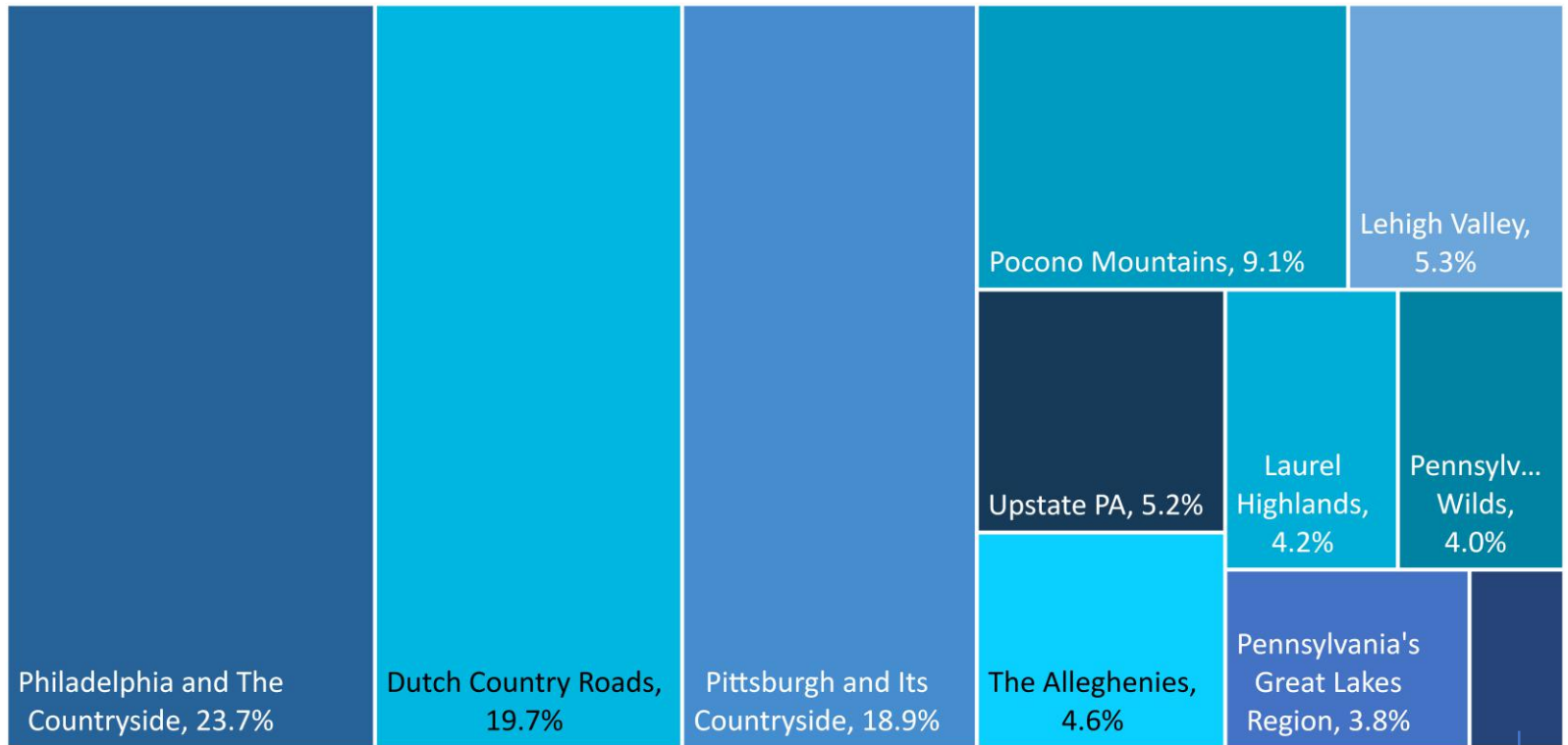
Source: IMPLAN, Tourism Economics

PA REGION & COUNTY ANALYSIS



PENNSYLVANIA TOURISM REGIONS

Regional share of visitor spending in Pennsylvania, 2019



Source: Tourism Economics

Valleys of the Susquehanna, 1.5%

PENNSYLVANIA TOURISM REGIONS

Visitor Spending by category

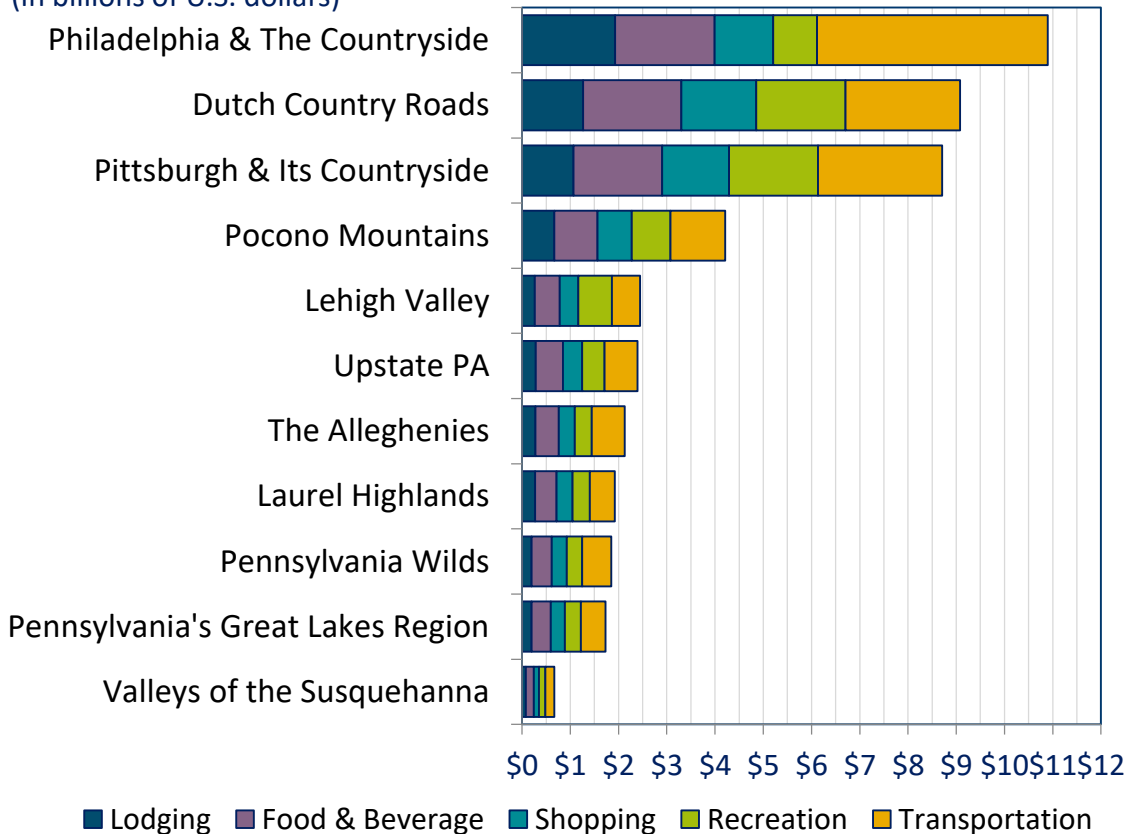
Every tourism region has benefitted from the spending of visitors. These expenditures encompass a wide range of products and services and help support local businesses and the livelihood of their employees.

The pattern of expenditures largely differs from region to region with visitors to the Lehigh Valley, greater Pittsburgh, and Dutch Country Roads regions allocating a relatively large portion of their trip dollars to recreational activities, while visitors to the greater Philadelphia region spent over 60% of their travel budgets on lodging and transportation costs.

Lodging was also a main expenditure for visitors to the Pocono Mountains region, as well as for visitors to the Laurel Highlands region. Shopping/retail purchases were a top expenditure category for visitors to Pennsylvania's Great Lakes Region and the Laurel Highlands.

Traveler Spending by Category and Region

(in billions of U.S. dollars)



Source: Tourism Economics

PENNSYLVANIA TOURISM REGIONS

Visitor spending category shares

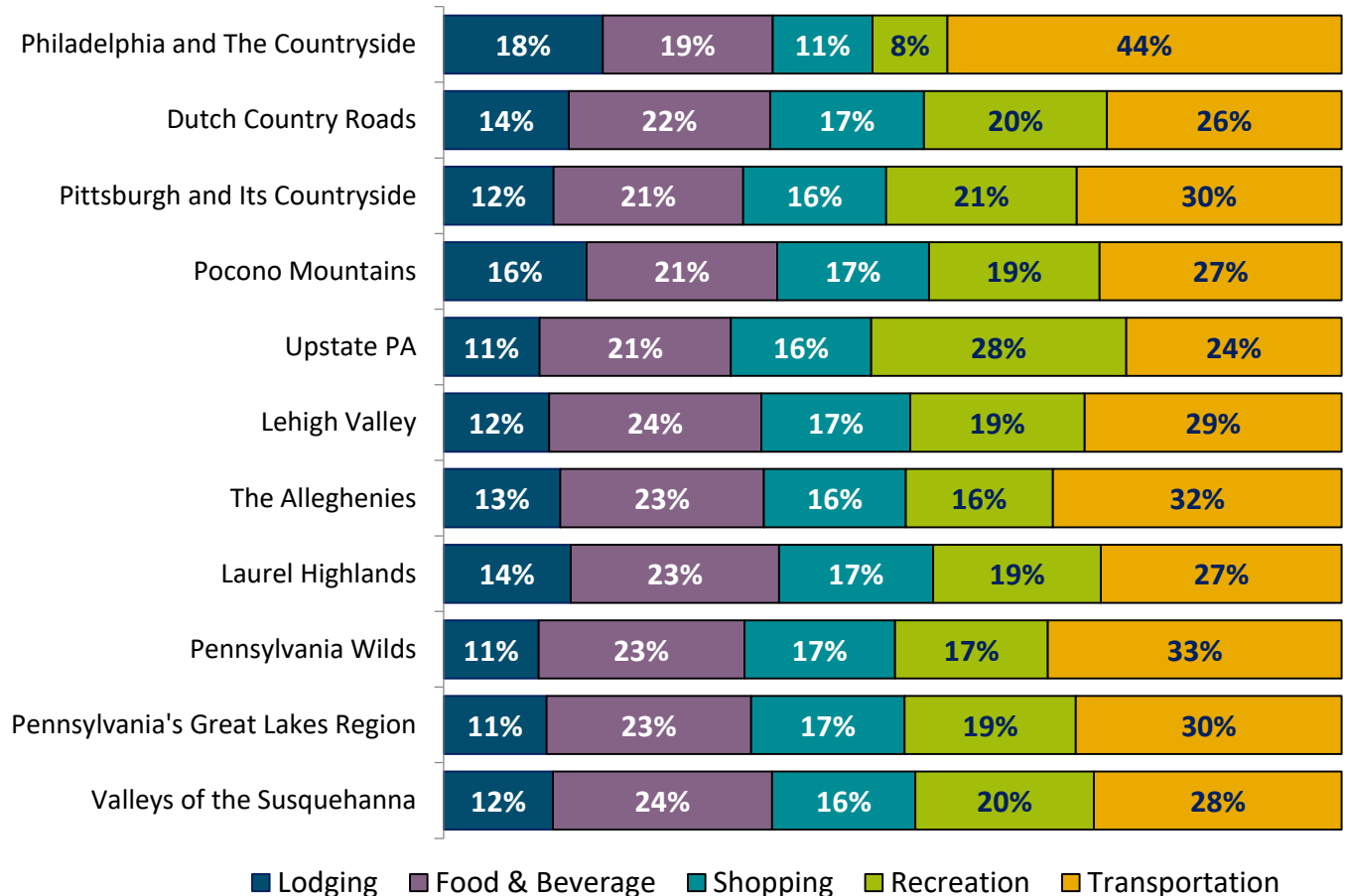
2019 Traveler Spending by Category and Region

Percent of Region Total

This chart shows the proportion of travelers' trip dollars going to the five main categories of visitor spending.

The pattern of expenditures was largely similar across the state's tourism regions, although with some notable exceptions.

The Philadelphia and The Countryside region is the one region where the pattern of visitor spending largely differs, with far more visitor dollars going to transportation and far less to recreational activities compared to the other 10 tourism regions.



Source: Tourism Economics

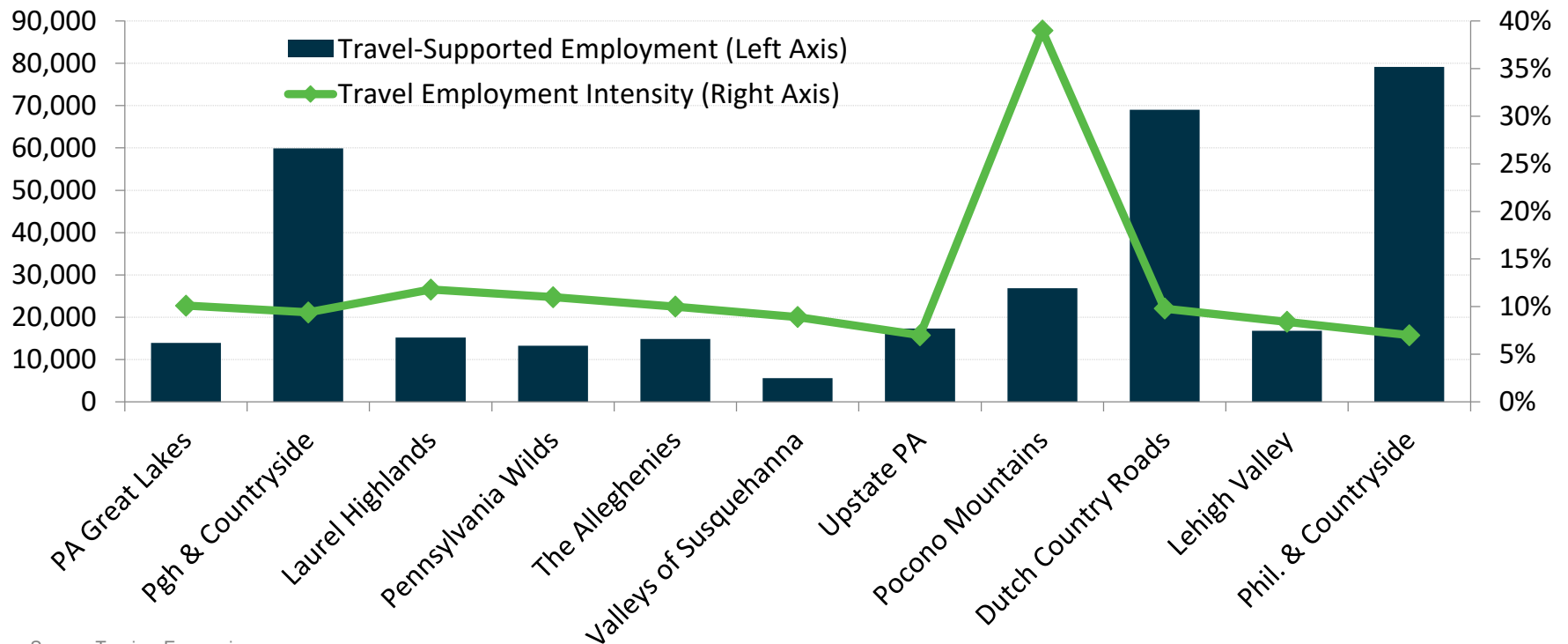
PENNSYLVANIA TOURISM REGIONS

Travel- and tourism-supported employment and employment intensity

Employment Intensity is the measure of each region's dependence on the travel and tourism industry for employment.

As in prior years, the Philadelphia and the Countryside region had the highest number of workers supported by travel and tourism, but the lowest employment intensity ranking in 2019. The Pocono Mountains once again had by far the highest employment intensity rating with almost 4 out of every 10 jobs in the region supported by travel and tourism.

The Dutch Country Roads region had the second highest number of jobs supported by travel and tourism, while the Laurel Highlands ranked second in terms of employment intensity.



Source: Tourism Economics

PENNSYLVANIA'S GREAT LAKES REGION

Overview

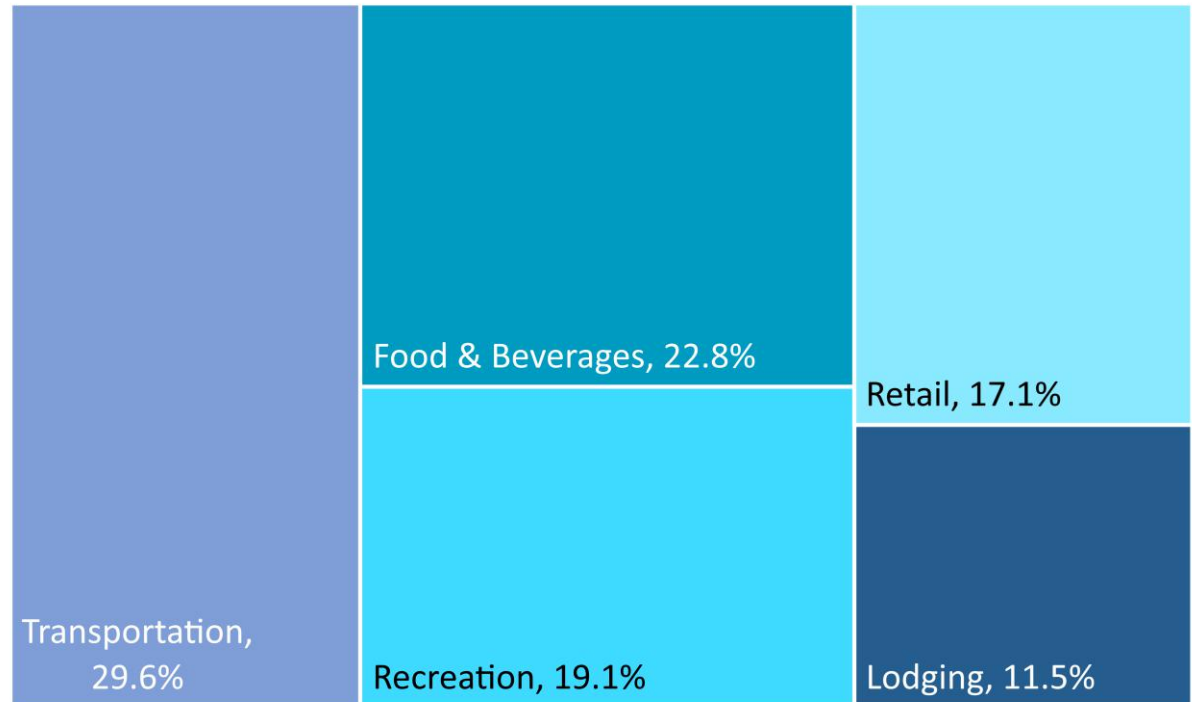
Pennsylvania's Great Lakes Region is comprised of Crawford, Erie, Mercer, and Venango Counties.

Visitors spent more than \$1.7 billion in Pennsylvania's Great Lakes Region in 2019, a 1.6% increase from 2018 and a new record high. The region ranked 10th among the state's 11 tourism regions in terms of total visitor spending

Strong increases in spending on recreational activities and food & beverages supported the region's 2019 visitor spending increase, with the other spending categories showing more subdued growth.

Shopping was a major draw for travelers to Pennsylvania's Great Lakes Region in 2019, with the region ranking 2nd among the state's 11 tourism regions in terms of the percent of traveler dollars spent on retail purchases.

Spending by category



Source: Tourism Economics

PENNSYLVANIA'S GREAT LAKES REGION

Travel and tourism impact on labor income and employment

The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.

The travel and tourism industry supported 10.1% of regional employment in 2019, with the number of jobs directly supported by the industry up 1.5% from the prior year -- the strongest rate of increase since 2013.

Pennsylvania's Great Lakes Region continued to rank 9th in the number of jobs directly supported by travel and tourism among Pennsylvania's 11 tourism regions, but 4th in terms of the industry's employment intensity in 2019.

Travel and Tourism Industry Share of the Regional Economy



Source: Tourism Economics, U.S. Bureau of Labor Statistics

PENNSYLVANIA'S GREAT LAKES REGION

Timeline

Tourism Industry Spending

Amounts in millions of nominal dollars

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Crawford	\$219.7	\$241.5	\$250.8	\$260.3	\$265.6	\$259.0	\$258.1	\$248.1	\$251.7	\$248.6	\$253.0
Erie	\$741.2	\$829.4	\$897.4	\$930.7	\$925.4	\$941.2	\$960.9	\$969.4	\$988.8	\$996.5	\$1,019.3
Mercer	\$233.2	\$256.0	\$279.7	\$304.9	\$319.9	\$315.9	\$315.4	\$307.4	\$305.7	\$313.7	\$314.8
Venango	\$108.7	\$118.3	\$124.0	\$132.1	\$130.9	\$132.6	\$144.9	\$140.3	\$141.1	\$146.5	\$146.2
Great Lakes	\$1,302.7	\$1,445.2	\$1,551.8	\$1,628.1	\$1,641.9	\$1,648.7	\$1,679.2	\$1,665.2	\$1,687.3	\$1,705.3	\$1,733.4
Percent Change		10.9%	7.4%	4.9%	0.8%	0.4%	1.9%	-0.8%	1.3%	1.1%	1.6%

Tourism Industry Employment Impacts

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Crawford	2,091	2,160	2,171	2,122	2,150	2,151	2,166	2,156	2,123	2,109	2,129
Erie	6,674	7,004	7,181	7,347	7,516	7,639	7,715	7,768	7,796	7,846	7,983
Mercer	2,343	2,417	2,485	2,557	2,614	2,640	2,627	2,584	2,561	2,561	2,595
Venango	1,113	1,138	1,153	1,143	1,158	1,166	1,188	1,196	1,192	1,214	1,231
Great Lakes	12,221	12,719	12,989	13,169	13,437	13,596	13,696	13,705	13,672	13,730	13,938
Percent Change		4.1%	2.1%	1.4%	2.0%	1.2%	0.7%	0.1%	-0.2%	0.4%	1.5%

PENNSYLVANIA'S GREAT LAKES REGION

Visitor Spending

Tourism Direct Sales (millions)

By County, 2019	Lodging	Food & beverages	Retail	Recreation	Transportation	Total
Crawford	16.4	63.2	42.7	40.6	90.1	253.0
Erie	133.0	229.5	169.8	215.2	271.9	1,019.3
Mercer	39.3	76.5	63.5	55.0	80.5	314.8
Venango	10.3	25.2	20.2	19.8	70.7	146.2
Great Lakes	199.0	394.4	296.3	330.6	513.1	1,733.4
Percent Change	0.4%	2.6%	0.2%	4.1%	0.7%	1.6%
By County, 2018						
Crawford	16.0	61.5	42.0	38.9	90.2	248.6
Erie	131.0	222.3	169.8	205.9	267.4	996.5
Mercer	40.2	75.6	63.2	53.4	81.3	313.7
Venango	10.9	25.1	20.7	19.1	70.8	146.5
Great Lakes	198.1	384.5	295.6	317.4	509.7	1,705.3

Source: Tourism Economics

PENNSYLVANIA'S GREAT LAKES REGION

TSA Categories

Tourism Satellite Account (millions)

By County, 2019	Visitor Spending	Government	Investment/ PCE	Total Tourism Demand
Crawford	253.0	0.6	14.6	268.3
Erie	1,019.3	5.9	59.0	1,084.3
Mercer	314.8	1.3	18.2	334.3
Venango	146.2	0.3	8.5	154.9
Great Lakes	1,733.4	8.1	100.3	1,841.8
Percent Change	1.6%	2.4%	-1.1%	1.5%
By County, 2018				
Crawford	248.6	0.6	14.8	264.0
Erie	996.5	5.8	59.2	1,061.5
Mercer	313.7	1.3	18.6	333.6
Venango	146.5	0.3	8.7	155.5
Great Lakes	1,705.3	7.9	101.4	1,814.6

Source: Tourism Economics

PENNSYLVANIA'S GREAT LAKES REGION

Direct Impacts

Tourism Industry (direct) Impacts (millions, except Employment (in units))

By County, 2019	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Crawford	253.0	2,129	54.4	13.3	12.4
Erie	1,019.3	7,983	238.0	58.7	52.6
Mercer	314.8	2,595	63.0	16.6	14.8
Venango	146.2	1,231	33.6	7.8	7.5
Great Lakes	1,733.4	13,938	389.0	96.3	87.3
Percent Change	1.6%	1.5%	5.8%	2.9%	4.3%
By County, 2018					
Crawford	248.6	2,109	52.1	12.9	12.0
Erie	996.5	7,846	223.9	56.8	50.2
Mercer	313.7	2,561	59.4	16.2	14.2
Venango	146.5	1,214	32.2	7.7	7.3
Great Lakes	1,705.3	13,730	367.6	93.6	83.7

Source: Tourism Economics

PENNSYLVANIA'S GREAT LAKES REGION

Total Impacts

Total Tourism Economy Impacts (millions, except Employment (in units))

By County, 2019	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Crawford	268.3	3,398	107.5	23.3	25.0
Erie	1,084.3	12,278	458.1	100.3	105.9
Mercer	334.3	4,040	121.4	28.7	29.8
Venango	154.9	1,944	62.9	13.7	15.0
Great Lakes	1,841.8	21,660	749.9	166.0	175.7
Percent Change	1.5%	3.2%	9.0%	3.0%	4.3%
By County, 2018					
Crawford	264.0	3,309	99.3	22.7	24.1
Erie	1,061.5	11,865	418.6	97.0	101.0
Mercer	333.6	3,931	111.9	28.0	28.6
Venango	155.5	1,887	58.0	13.6	14.7
Great Lakes	1,814.6	20,991.9	687.7	161.3	168.5

Source: Tourism Economics

LAUREL HIGHLANDS

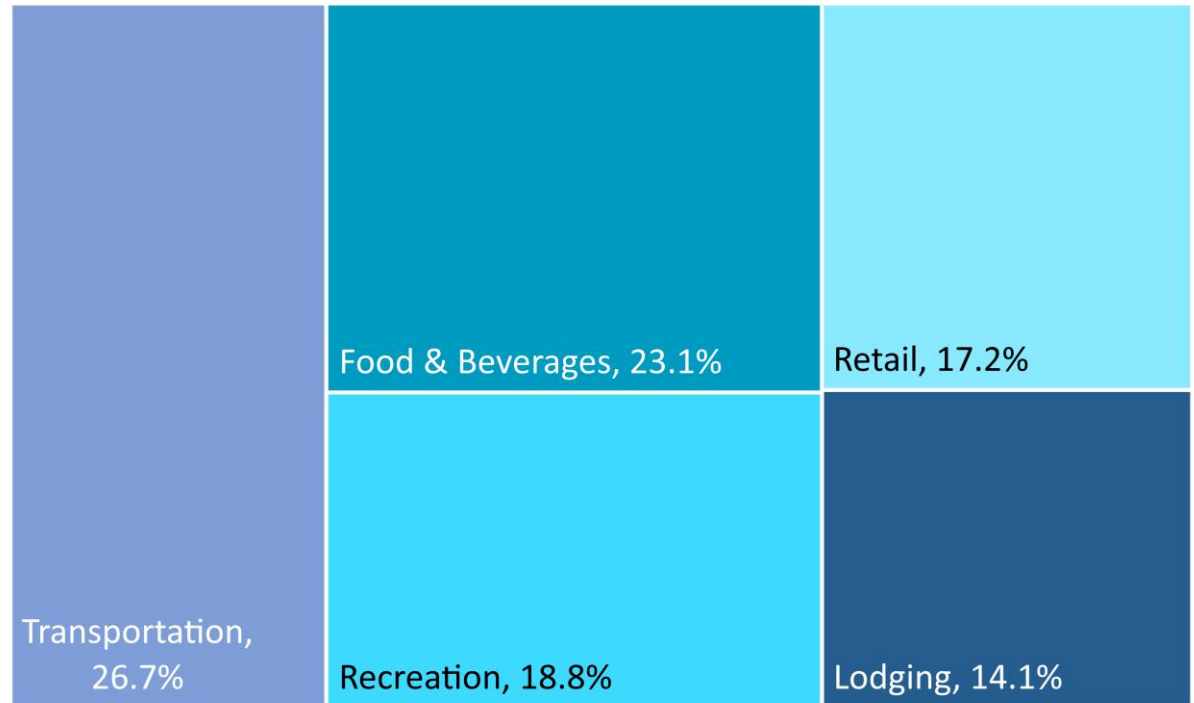
Overview

The Laurel Highlands region is comprised of Fayette, Somerset, and Westmoreland Counties.

Visitor spending in the Laurel Highlands region grew by over 4% in 2019 to reach more than \$1.9 billion – a new record high and the fastest rate of growth for the region since 2011.

Strong increases in spending on recreation, lodging, and food & beverages contributed to the region's strong increase in total spending, with increased spending on retail purchases and transportation also contributing but at slightly more subdued rates of growth.

Spending by category



Source: Tourism Economics

LAUREL HIGHLANDS

Travel and tourism impact on labor income and employment

The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.

The travel industry supported 11.8% of regional employment in 2019 – rebounding from the prior year's slight drop. The region continued to have the second highest percentage of travel-supported jobs among the state's 11 tourism regions and to rank 7th in the actual number of travel-supported jobs.

The travel industry's share of the Laurel Highlands region's total labor income was 9.8% in 2019. Labor income directly derived from travel and tourism rose 5.7%, and by 9.6% under the broadest measure (i.e., travel economy) that includes the income derived from indirect and induced sources.

Travel and Tourism Industry Share of Regional Economy



Source: Tourism Economics, U.S. Bureau of Labor Statistics

LAUREL HIGHLANDS

Timeline

Tourism Industry Spending

Amounts in millions of nominal dollars

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Fayette	\$538.2	\$595.7	\$636.0	\$643.9	\$663.8	\$677.5	\$667.2	\$661.8	\$684.8	\$690.2	\$733.8
Somerset	\$306.9	\$330.1	\$371.0	\$378.7	\$380.2	\$387.6	\$399.9	\$377.4	\$392.0	\$398.7	\$416.8
Westmoreland	\$587.6	\$651.6	\$724.7	\$745.9	\$742.6	\$772.4	\$753.9	\$721.3	\$745.4	\$758.5	\$772.7
Laurel Highlands	\$1,432.6	\$1,577.3	\$1,731.7	\$1,768.5	\$1,786.6	\$1,837.5	\$1,821.1	\$1,760.5	\$1,822.2	\$1,847.3	\$1,923.2
Percent Change		10.1%	9.8%	2.1%	1.0%	2.8%	-0.9%	-3.3%	3.5%	1.4%	4.1%

Tourism Industry Employment Impacts

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Fayette	5,047	5,219	5,295	5,417	5,808	5,836	5,834	5,852	5,914	5,821	5,985
Somerset	3,255	3,234	3,257	3,193	3,285	3,331	3,322	3,233	3,261	3,281	3,345
Westmoreland	5,243	5,369	5,476	5,632	5,716	5,764	5,661	5,649	5,703	5,744	5,855
Laurel Highlands	13,544	13,822	14,028	14,242	14,809	14,932	14,817	14,735	14,878	14,846	15,185
Percent Change		2.1%	1.5%	1.5%	4.0%	0.8%	-0.8%	-0.6%	1.0%	-0.2%	2.3%

LAUREL HIGHLANDS

Visitor Spending

Tourism Direct Sales (millions)

By County, 2019	Lodging	Food & beverages	Retail	Recreation	Transportation	Total
Fayette	136.2	171.3	120.0	141.6	164.7	733.8
Somerset	60.8	99.2	66.5	75.7	114.5	416.8
Westmoreland	75.3	175.6	143.0	142.4	236.4	772.7
Laurel Highlands	272.3	446.1	329.5	359.7	515.5	1,923.2
Percent Change	5.5%	4.5%	2.8%	6.3%	2.4%	4.1%
By County, 2018						
Fayette	125.1	160.2	114.8	132.2	157.9	690.2
Somerset	57.8	94.3	64.0	70.3	112.3	398.7
Westmoreland	75.1	172.4	141.9	136.0	233.1	758.5
Laurel Highlands	258.0	426.8	320.7	338.5	503.3	1,847.3

Source: Tourism Economics

LAUREL HIGHLANDS

TSA Categories

Tourism Satellite Account (millions)

By County, 2019	Visitor Spending	Government	Investment/ PCE	Total Tourism Demand
Fayette	733.8	2.9	42.5	779.2
Somerset	416.8	1.8	24.1	442.7
Westmoreland	772.7	2.9	44.7	820.2
Laurel Highlands	1,923.2	7.6	111.3	2,042.1
Percent Change	4.1%	17.4%	1.3%	4.0%
By County, 2018				
Fayette	690.2	2.3	41.0	733.5
Somerset	398.7	1.4	23.7	423.8
Westmoreland	758.5	2.7	45.1	806.3
Laurel Highlands	1,847.3	6.5	109.8	1,963.6

Source: Tourism Economics

LAUREL HIGHLANDS

Direct Impacts

Tourism Industry (direct) Impacts (millions, except Employment (in units))

By County, 2019	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Fayette	733.8	5,985	191.0	42.7	40.5
Somerset	416.8	3,345	100.5	23.7	21.9
Westmoreland	772.7	5,855	157.7	40.7	36.8
Laurel Highlands	1,923.2	15,185	449.2	107.1	99.2
Percent Change	4.1%	2.3%	5.7%	5.3%	5.3%
By County, 2018					
Fayette	690.2	5,821	178.8	39.8	37.9
Somerset	398.7	3,281	94.6	22.3	20.7
Westmoreland	758.5	5,744	151.7	39.5	35.5
Laurel Highlands	1,847.3	14,846	425.1	101.7	94.2

Source: Tourism Economics

LAUREL HIGHLANDS

Total Impacts

Total Tourism Economy Impacts (millions, except Employment (in units))

By County, 2019	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Fayette	779.2	8,612	371.5	74.2	81.6
Somerset	442.7	4,875	190.0	40.9	44.2
Westmoreland	820.2	9,914	315.2	70.6	74.1
Laurel Highlands	2,042.1	23,401	876.7	185.7	199.8
Percent Change	4.0%	4.0%	9.6%	5.0%	5.3%
By County, 2018					
Fayette	733.5	8,216	335.4	69.5	76.5
Somerset	423.8	4,692	173.8	38.8	41.8
Westmoreland	806.3	9,582	290.8	68.6	71.4
Laurel Highlands	1,963.6	22,491.1	800.0	176.9	189.7

Source: Tourism Economics

PITTSBURGH & ITS COUNTRYSIDE

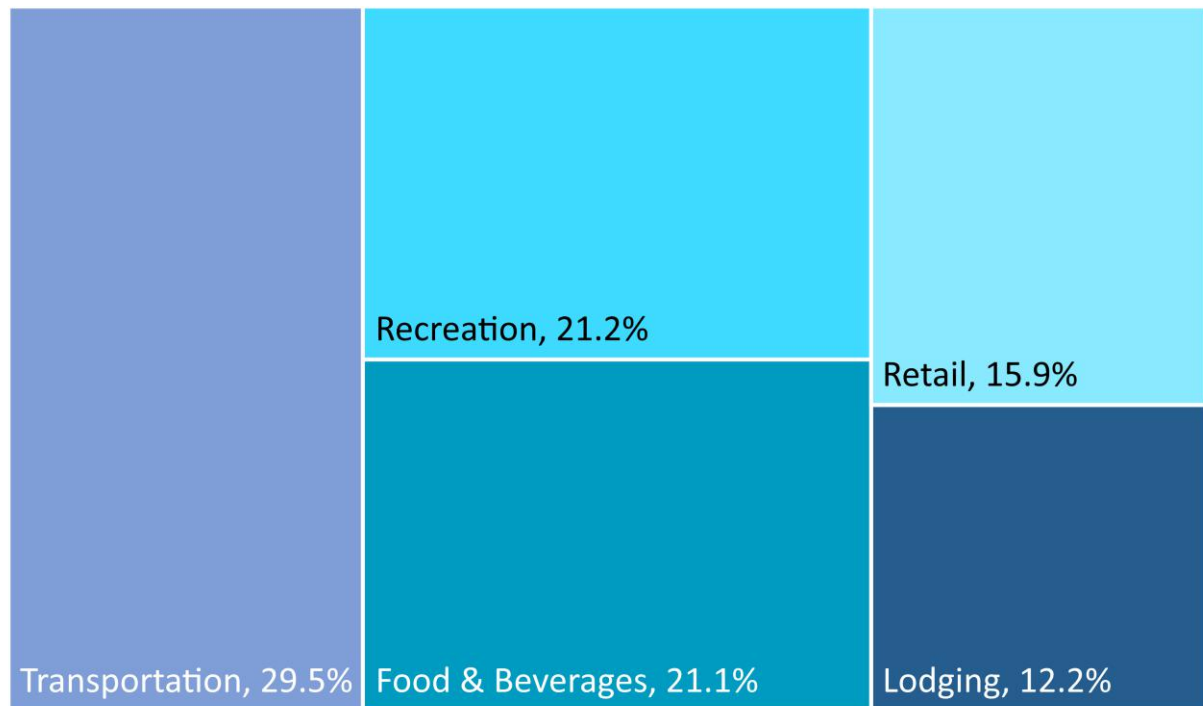
Overview

The Pittsburgh & Its Countryside region is comprised of Allegheny, Armstrong, Beaver, Butler, Greene, Indiana, Lawrence, and Washington Counties.

Travelers spent more than \$8.7 billion in the region in 2019 – a new record high and a 2.5% increase from 2018. As in prior years, the region had the third highest level of traveler spending among the state’s 11 tourism regions.

Recreation remained a major draw for the region’s visitors in 2019 with spending on recreational activities growing by 5% from 2018 – by far the strongest spending increase of the region’s various traveler spending categories. The region continued to rank 2nd among the state’s 11 tourism regions for both the total amount visitors spent on, and the share of total travel budgets devoted to, recreational purchases.

Spending by category



Source: Tourism Economics

PITTSBURGH & ITS COUNTRYSIDE

Travel and tourism impact on labor income and employment

The chart shows the travel economy's share (including direct, indirect, and induced impacts) of the region's total for both labor income and employment.

The travel industry's share of the greater Pittsburgh region's employment rose to 9.4% in 2019 with the 1.5% increase in jobs directly supported by travel and tourism reaching close to 60,000 – a new record high. The industry's share of the region's labor income was 7.7%.

As in prior years, the region continued to have the 3rd highest number of travel-supported jobs of the state's 11 tourism regions and to rank 7th in the industry's employment intensity in 2019.

Travel and Tourism Industry Share of Regional Economy



Source: Tourism Economics, U.S. Bureau of Labor Statistics

PITTSBURGH & ITS COUNTRYSIDE

Timeline

Tourism Industry Spending

Amounts in millions of nominal dollars

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Allegheny	\$4,354.6	\$4,828.1	\$5,231.2	\$5,494.0	\$5,575.1	\$5,679.8	\$5,987.7	\$5,950.8	\$6,137.9	\$6,379.6	\$6,572.4
Armstrong	\$58.6	\$71.3	\$84.0	\$89.8	\$91.3	\$90.9	\$88.9	\$88.5	\$92.4	\$93.2	\$93.7
Beaver	\$196.0	\$217.2	\$237.4	\$244.9	\$249.8	\$256.4	\$267.0	\$270.5	\$283.4	\$292.0	\$311.8
Butler	\$406.1	\$440.6	\$485.7	\$578.8	\$582.1	\$597.6	\$604.2	\$592.1	\$593.7	\$613.9	\$632.0
Greene	\$58.7	\$68.9	\$74.6	\$80.4	\$91.9	\$94.7	\$89.2	\$76.1	\$78.5	\$83.6	\$78.7
Indiana	\$144.5	\$154.2	\$169.7	\$184.3	\$179.1	\$175.3	\$162.0	\$155.4	\$162.1	\$165.7	\$170.9
Lawrence	\$83.7	\$98.6	\$113.4	\$118.9	\$117.9	\$119.6	\$120.1	\$120.2	\$126.8	\$130.0	\$133.2
Washington	\$482.3	\$582.7	\$668.4	\$740.7	\$755.3	\$760.3	\$747.0	\$662.6	\$703.7	\$737.3	\$714.3
Pittsburgh and its Countryside	\$5,784.5	\$6,461.7	\$7,064.4	\$7,531.8	\$7,642.5	\$7,774.5	\$8,066.1	\$7,916.2	\$8,178.6	\$8,495.3	\$8,707.1
Percent Change		11.7%	9.3%	6.6%	1.5%	1.7%	3.7%	-1.9%	3.3%	3.9%	2.5%

Tourism Industry Employment Impacts

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Allegheny	36,188	37,302	38,112	39,094	39,964	40,254	40,888	41,530	42,295	43,080	43,848
Armstrong	484	554	559	568	573	576	584	594	608	621	621
Beaver	1,977	1,965	1,975	1,997	2,048	2,070	2,096	2,111	2,124	2,157	2,235
Butler	3,664	3,740	3,828	3,941	3,996	4,050	4,048	4,074	4,073	4,162	4,199
Greene	419	479	479	483	485	488	487	483	486	505	509
Indiana	1,347	1,351	1,381	1,427	1,450	1,460	1,426	1,421	1,443	1,484	1,506
Lawrence	806	873	877	896	907	917	909	927	933	954	976
Washington	5,026	5,570	5,740	5,840	5,949	5,953	5,948	5,856	5,875	6,000	5,974
Pittsburgh and its Countryside	49,911	51,834	52,952	54,246	55,374	55,767	56,388	56,995	57,838	58,964	59,868
Percent Change		3.9%	2.2%	2.4%	2.1%	0.7%	1.1%	1.1%	1.5%	1.9%	1.5%

Source: Tourism Economics

PITTSBURGH & ITS COUNTRYSIDE

Visitor Spending

Tourism Direct Sales (millions)

By County, 2019	Lodging	Food & beverages	Retail	Recreation	Transportation	Total
Allegheny	836.4	1,360.6	1,034.6	1,398.6	1,942.2	6,572.4
Armstrong	4.1	20.2	12.6	25.7	31.2	93.7
Beaver	26.6	69.6	48.9	49.6	117.1	311.8
Butler	82.9	146.3	112.5	109.3	181.1	632.0
Greene	9.4	19.0	12.4	13.6	24.4	78.7
Indiana	20.1	44.0	29.9	30.2	46.7	170.9
Lawrence	8.5	32.1	26.1	30.0	36.5	133.2
Washington	78.0	146.9	109.9	188.1	191.5	714.3
Pittsburgh and its Countryside	1,065.9	1,838.6	1,386.8	1,845.1	2,570.7	8,707.1
Percent Change	0.9%	2.9%	2.2%	5.0%	1.3%	2.5%
By County, 2018						
Allegheny	824.8	1,314.7	1,009.0	1,316.3	1,914.8	6,379.6
Armstrong	4.1	19.6	12.3	25.8	31.4	93.2
Beaver	21.9	64.1	45.5	44.9	115.6	292.0
Butler	82.1	141.9	110.4	104.4	175.1	613.9
Greene	11.0	19.8	13.7	14.0	25.1	83.6
Indiana	19.2	42.3	29.2	28.6	46.3	165.7
Lawrence	8.0	30.9	24.3	29.5	37.3	130.0
Washington	85.0	152.7	112.8	193.8	193.1	737.3
Pittsburgh and its Countryside	1,056.1	1,786.0	1,357.1	1,757.4	2,538.8	8,495.3

PITTSBURGH & ITS COUNTRYSIDE

TSA Categories **Tourism Satellite Account**
(millions)

By County, 2019	Visitor Spending	Government	Investment/ PCE	Total Tourism Demand
Allegheny	6,572.4	43.7	380.3	6,996.4
Armstrong	93.7	0.2	5.4	99.4
Beaver	311.8	1.0	18.0	330.9
Butler	632.0	2.9	36.6	671.5
Greene	78.7	0.2	4.6	83.5
Indiana	170.9	0.7	9.9	181.6
Lawrence	133.2	0.4	7.7	141.3
Washington	714.3	2.8	41.3	758.4
Pittsburgh and its Countryside	8,707.1	52.0	503.9	9,263.0
Percent Change	2.5%	2.8%	-0.2%	2.3%
By County, 2018				
Allegheny	6,379.6	42.3	379.3	6,801.2
Armstrong	93.2	0.2	5.5	98.9
Beaver	292.0	0.9	17.4	310.3
Butler	613.9	2.9	36.5	653.3
Greene	83.6	0.2	5.0	88.8
Indiana	165.7	0.7	9.9	176.3
Lawrence	130.0	0.4	7.7	138.1
Washington	737.3	3.1	43.8	784.2
Pittsburgh and its Countryside	8,495.3	50.6	505.1	9,051.0

Source: Tourism Economics

PITTSBURGH & ITS COUNTRYSIDE

Direct Impacts **Tourism Industry (direct) Impacts** (millions, except Employment (in units))

By County, 2019	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Allegheny	6,572.4	43,848	1,855.7	413.2	381.7
Armstrong	93.7	621	17.4	4.6	4.2
Beaver	311.8	2,235	69.1	16.8	15.6
Butler	632.0	4,199	125.4	33.6	29.6
Greene	78.7	509	13.0	3.8	3.3
Indiana	170.9	1,506	38.8	9.5	8.7
Lawrence	133.2	976	28.0	7.0	6.5
Washington	714.3	5,974	207.2	43.5	42.2
Pittsburgh and its Countryside	8,707.1	59,868	2,354.6	532.1	491.9
Percent Change	2.5%	1.5%	5.0%	2.7%	3.9%
By County, 2018					
Allegheny	6,379.6	43,080	1,761.0	400.7	366.2
Armstrong	93.2	621	16.8	4.6	4.1
Beaver	292.0	2,157	64.9	15.8	14.6
Butler	613.9	4,162	119.6	32.6	28.5
Greene	83.6	505	12.6	3.9	3.4
Indiana	165.7	1,484	36.8	9.1	8.3
Lawrence	130.0	954	26.9	6.7	6.2
Washington	737.3	6,000	204.1	44.4	42.3
Pittsburgh and its Countryside	8,495.3	58,964	2,242.7	517.9	473.5

PITTSBURGH & ITS COUNTRYSIDE

Total Impacts

Total Tourism Economy Impacts (millions, except Employment (in units))

By County, 2019	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Allegheny	6,996.4	65,389	3,549.3	706.1	769.9
Armstrong	99.4	1,219	32.2	8.1	8.5
Beaver	330.9	3,859	132.9	29.3	31.4
Butler	671.5	6,647	249.5	57.8	59.6
Greene	83.5	857	23.6	6.6	6.7
Indiana	181.6	2,468	77.1	16.4	17.5
Lawrence	141.3	1,774	53.3	12.2	13.0
Washington	758.4	9,078	399.4	75.7	85.2
Pittsburgh and its Countryside	9,263.0	91,290	4,517.3	912.3	991.7
Percent Change	2.3%	3.4%	9.5%	2.8%	3.9%
By County, 2018					
Allegheny	6,801.2	63,049	3,232.1	684.5	738.5
Armstrong	98.9	1,203	29.5	8.0	8.3
Beaver	310.3	3,672	120.0	27.5	29.4
Butler	653.3	6,458	228.9	56.0	57.3
Greene	88.8	838	21.8	6.8	6.8
Indiana	176.3	2,391	70.3	15.8	16.7
Lawrence	138.1	1,718	49.4	11.8	12.5
Washington	784.2	8,934	373.8	77.1	85.3
Pittsburgh and its Countryside	9,051.0	88,260.6	4,125.7	887.5	954.7

PENNSYLVANIA WILDS

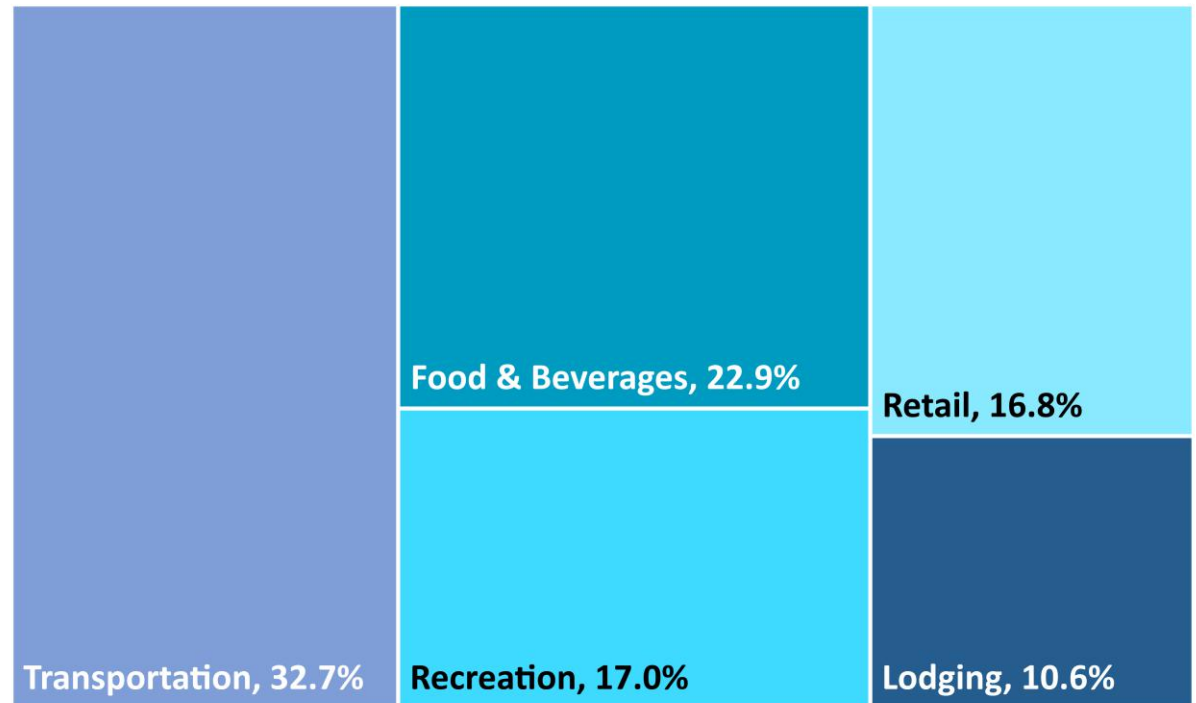
Overview

The Pennsylvania Wilds region is comprised of Cameron, Clarion, Clearfield, Clinton, Elk, Forest, Jefferson, Lycoming, McKean, Potter, Tioga, and Warren Counties.

Visitor spending grew 2.0% in 2019 to almost \$1.85 billion – a new record high -- led by relatively strong growth in spending on recreational activities and food & beverages with growth rates of 4.2% and 3.1%, respectively.

As in prior years, travelers to the region spent a relatively large share of their trip budgets on transportation and small proportion on lodging with the region continuing to rank 2nd and 11th, respectively, among the state's 11 tourism regions for these spending categories.

Spending by category



Source: Tourism Economics

PENNSYLVANIA WILDS

Travel and tourism impact on labor income and employment

The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.

The travel and tourism industry supported 11.0% of the region's employment in 2019 – continuing its upward climb as jobs grew directly supported by travel and tourism up 1.9% from 2018, which was the highest rate of increase since 2013.

The region ranked 10th among the state's 11 tourism regions in terms of the number of travel-supported jobs, but 3rd in employment intensity demonstrating the importance of travel and tourism to the region's economy.

The travel industry supported 8.8% of the labor income earned in the region in 2019 – with the dollar amount of travel-supported labor income growing 8.7% from 2018 under the broadest economic measure (i.e., travel economy).

Travel and Tourism Industry Share of Regional Economy



Source: Tourism Economics, U.S. Bureau of Labor Statistics

PENNSYLVANIA WILDS

Timeline

Tourism Industry Spending

Amounts in millions of nominal dollars

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Cameron	\$7.8	\$9.0	\$9.5	\$9.6	\$9.6	\$9.4	\$9.7	\$10.1	\$10.1	\$10.0	\$10.4
Clarion	\$93.5	\$108.1	\$112.5	\$118.6	\$121.5	\$115.4	\$117.7	\$118.9	\$125.5	\$123.3	\$126.0
Clearfield	\$212.3	\$248.9	\$261.8	\$264.3	\$265.5	\$276.5	\$270.0	\$266.2	\$277.3	\$292.7	\$293.9
Clinton	\$108.0	\$136.6	\$151.4	\$153.9	\$150.6	\$147.5	\$147.7	\$140.6	\$149.9	\$152.4	\$160.0
Elk	\$47.2	\$52.3	\$61.4	\$66.1	\$66.0	\$69.3	\$74.7	\$78.0	\$80.2	\$79.2	\$82.5
Forest	\$18.5	\$20.4	\$23.7	\$22.6	\$23.4	\$23.2	\$27.0	\$26.3	\$27.2	\$27.1	\$26.1
Jefferson	\$82.2	\$102.9	\$109.9	\$113.6	\$115.1	\$115.1	\$119.1	\$116.0	\$124.1	\$121.9	\$120.8
Lycoming	\$269.3	\$308.7	\$384.4	\$398.2	\$405.9	\$391.4	\$382.5	\$370.6	\$379.3	\$392.1	\$408.9
McKean	\$123.2	\$158.9	\$164.0	\$173.4	\$174.5	\$174.8	\$174.6	\$172.9	\$180.0	\$183.4	\$182.6
Potter	\$27.0	\$30.1	\$36.6	\$34.3	\$34.5	\$35.4	\$38.8	\$37.7	\$40.2	\$38.9	\$39.4
Tioga	\$139.5	\$171.2	\$192.3	\$193.4	\$187.6	\$190.9	\$195.2	\$193.3	\$193.5	\$201.4	\$203.6
Warren	\$137.7	\$149.3	\$162.5	\$169.4	\$169.3	\$173.9	\$178.6	\$182.3	\$186.8	\$190.2	\$194.1
Pennsylvania Wilds	\$1,266.2	\$1,496.4	\$1,670.0	\$1,717.3	\$1,723.4	\$1,722.9	\$1,735.6	\$1,712.8	\$1,774.1	\$1,812.7	\$1,848.2
Percent Change		18.2%	11.6%	2.8%	0.4%	0.0%	0.7%	-1.3%	3.6%	2.2%	2.0%

Source: Tourism Economics

PENNSYLVANIA WILDS

Timeline

Tourism Industry Employment Impacts

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Cameron	73	74	75	75	76	76	76	77	77	78	80
Clarion	899	972	993	1,022	1,046	1,051	1,071	1,110	1,114	1,127	1,157
Clearfield	1,594	1,770	1,793	1,775	1,778	1,817	1,799	1,812	1,836	1,869	1,897
Clinton	798	952	990	993	1,040	1,045	1,064	1,069	1,073	1,090	1,128
Elk	462	488	509	531	554	557	573	591	596	601	622
Forest	124	135	136	137	137	138	138	139	139	140	142
Jefferson	683	747	762	785	804	807	821	816	828	839	846
Lycoming	2,538	2,707	2,790	2,901	2,973	2,961	2,952	2,930	2,951	2,989	3,032
McKean	943	1,112	1,130	1,114	1,138	1,144	1,164	1,166	1,197	1,203	1,216
Potter	195	206	216	229	241	242	246	245	253	257	257
Tioga	1,215	1,387	1,451	1,462	1,530	1,535	1,573	1,623	1,630	1,640	1,680
Warren	1,123	1,133	1,149	1,120	1,141	1,147	1,156	1,167	1,177	1,189	1,212
Pennsylvania Wilds	10,648	11,684	11,993	12,142	12,456	12,519	12,632	12,745	12,872	13,021	13,268
Percent Change		9.7%	2.6%	1.2%	2.6%	0.5%	0.9%	0.9%	1.0%	1.2%	1.9%

Source: Tourism Economics

PENNSYLVANIA WILDS

Visitor Spending

Tourism Direct Sales (millions)

By County, 2019	Lodging	Food & beverages	Retail	Recreation	Transportation	Total
Cameron	0.7	2.1	1.8	2.8	3.1	10.4
Clarion	15.8	30.1	21.8	23.5	34.8	126.0
Clearfield	29.7	66.5	54.7	50.3	92.6	293.9
Clinton	15.4	37.9	25.4	28.9	52.5	160.0
Elk	10.7	21.5	15.2	13.9	21.2	82.5
Forest	3.7	5.8	5.0	4.9	6.8	26.1
Jefferson	8.5	23.2	17.2	20.6	51.1	120.8
Lycoming	55.4	100.8	67.5	62.7	122.5	408.9
McKean	17.7	39.4	27.6	30.1	67.8	182.6
Potter	5.6	8.7	6.9	6.6	11.5	39.4
Tioga	23.4	47.3	34.4	37.5	60.9	203.6
Warren	8.7	40.3	32.3	32.9	79.9	194.1
Pennsylvania Wilds	195.4	423.6	309.8	314.7	604.8	1,848.2
Percent Change	1.7%	3.1%	1.8%	4.2%	0.2%	2.0%

Source: Tourism Economics

PENNSYLVANIA WILDS

Visitor Spending

Tourism Direct Sales (millions)

By County, 2018	Lodging	Food & beverages	Retail	Recreation	Transportation	Total
Cameron	0.6	2.0	1.7	2.6	3.0	10.0
Clarion	15.5	29.2	21.6	22.2	34.8	123.3
Clearfield	30.2	65.5	54.3	48.7	94.0	292.7
Clinton	13.9	35.4	24.1	26.6	52.5	152.4
Elk	10.1	20.3	14.7	13.2	21.0	79.2
Forest	4.2	5.8	5.2	4.9	7.0	27.1
Jefferson	9.0	23.0	17.3	21.1	51.4	121.9
Lycoming	52.1	96.6	65.2	58.5	119.8	392.1
McKean	19.1	38.8	27.7	30.0	67.8	183.4
Potter	5.5	8.5	6.8	6.7	11.5	38.9
Tioga	23.1	46.6	34.0	36.1	61.6	201.4
Warren	8.8	39.3	31.6	31.4	79.1	190.2
Pennsylvania Wilds	192.1	410.9	304.3	302.0	603.4	1,812.7

Source: Tourism Economics

PENNSYLVANIA WILDS

TSA Categories

Tourism Satellite Account (millions)

By County, 2019	Visitor Spending	Government	Investment/ PCE	Total Tourism Demand
Cameron	10.4	0.0	0.6	11.0
Clarion	126.0	0.4	7.3	133.7
Clearfield	293.9	0.8	17.0	311.7
Clinton	160.0	0.6	9.3	169.9
Elk	82.5	0.3	4.8	87.6
Forest	26.1	0.1	1.5	27.7
Jefferson	120.8	0.3	7.0	128.1
Lycoming	408.9	1.9	23.7	434.4
McKean	182.6	0.5	10.6	193.7
Potter	39.4	0.2	2.3	41.8
Tioga	203.6	0.9	11.8	216.2
Warren	194.1	0.4	11.2	205.8
Pennsylvania Wilds	1,848.2	6.4	107.0	1,961.6
Percent Change	2.0%	5.5%	-0.8%	1.8%

Source: Tourism Economics

PENNSYLVANIA WILDS

TSA Categories

Tourism Satellite Account (millions)

By County, 2018	Visitor Spending	Government	Investment/ PCE	Total Tourism Demand
Cameron	10.0	0.0	0.6	10.6
Clarion	123.3	0.3	7.3	131.0
Clearfield	292.7	0.8	17.4	310.9
Clinton	152.4	0.5	9.1	162.0
Elk	79.2	0.3	4.7	84.2
Forest	27.1	0.1	1.6	28.8
Jefferson	121.9	0.3	7.2	129.4
Lycoming	392.1	1.7	23.3	417.1
McKean	183.4	0.6	10.9	194.9
Potter	38.9	0.2	2.3	41.4
Tioga	201.4	0.8	12.0	214.2
Warren	190.2	0.4	11.3	201.9
Pennsylvania Wilds	1,812.7	6.1	107.8	1,926.6

Source: Tourism Economics

PENNSYLVANIA WILDS

Direct Impacts

Tourism Industry (direct) Impacts (millions, except Employment (in units))

By County, 2019	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Cameron	10.4	80	1.6	0.5	0.4
Clarion	126.0	1,157	29.0	6.9	6.4
Clearfield	293.9	1,897	58.0	15.0	13.7
Clinton	160.0	1,128	31.2	8.3	7.4
Elk	82.5	622	13.9	4.1	3.5
Forest	26.1	142	4.1	1.2	1.1
Jefferson	120.8	846	26.6	6.4	6.0
Lycoming	408.9	3,032	87.3	22.3	20.0
McKean	182.6	1,216	35.3	9.3	8.4
Potter	39.4	257	6.4	2.0	1.7
Tioga	203.6	1,680	47.1	11.4	10.4
Warren	194.1	1,212	31.6	9.2	8.2
Pennsylvania Wilds	1,848.2	13,268	372.0	96.6	87.3
Percent Change	2.0%	1.9%	4.7%	2.8%	3.7%

Source: Tourism Economics

PENNSYLVANIA WILDS

Direct Impacts

Tourism Industry (direct) Impacts (millions, except Employment (in units))

By County, 2018	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Cameron	10.0	78	1.5	0.5	0.4
Clarion	123.3	1,127	27.4	6.6	6.2
Clearfield	292.7	1,869	55.4	14.8	13.3
Clinton	152.4	1,090	29.6	7.9	7.0
Elk	79.2	601	13.2	3.9	3.4
Forest	27.1	140	3.9	1.2	1.1
Jefferson	121.9	839	25.8	6.4	5.9
Lycoming	392.1	2,989	84.2	21.4	19.2
McKean	183.4	1,203	33.7	9.3	8.2
Potter	38.9	257	6.2	1.9	1.6
Tioga	201.4	1,640	44.6	11.1	10.1
Warren	190.2	1,189	29.8	8.9	7.8
Pennsylvania Wilds	1,812.7	13,021	355.3	94.0	84.2

Source: Tourism Economics

PENNSYLVANIA WILDS

Total Impacts

Total Tourism Economy Impacts (millions, except Employment (in units))

By County, 2019	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Cameron	11.0	137	3.0	0.9	0.9
Clarion	133.7	1,829	58.6	12.0	13.0
Clearfield	311.7	3,055	110.9	26.2	27.6
Clinton	169.9	1,759	60.0	14.4	14.9
Elk	87.6	1,009	27.3	7.1	7.1
Forest	27.7	241	7.8	2.2	2.2
Jefferson	128.1	1,425	50.9	11.2	12.1
Lycoming	434.4	4,699	166.7	38.4	40.2
McKean	193.7	1,878	66.9	16.2	17.0
Potter	41.8	433	12.2	3.4	3.3
Tioga	216.2	2,516	87.1	19.7	21.0
Warren	205.8	1,901	61.9	16.1	16.4
Pennsylvania Wilds	1,961.6	20,882	713.3	167.7	175.7
Percent Change	1.8%	3.6%	8.7%	2.7%	3.7%

Source: Tourism Economics

PENNSYLVANIA WILDS

Total Impacts

Total Tourism Economy Impacts (millions, except Employment (in units))

By County, 2018	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Cameron	10.6	131	2.7	0.8	0.8
Clarion	131.0	1,760	54.1	11.6	12.4
Clearfield	310.9	2,960	102.0	25.8	26.8
Clinton	162.0	1,678	55.6	13.7	14.2
Elk	84.2	964	25.1	6.8	6.8
Forest	28.8	234	7.2	2.2	2.1
Jefferson	129.4	1,390	47.1	11.2	11.9
Lycoming	417.1	4,551	153.8	37.0	38.7
McKean	194.9	1,823	61.6	16.1	16.5
Potter	41.4	425	11.4	3.3	3.2
Tioga	214.2	2,411	79.4	19.2	20.2
Warren	201.9	1,834	56.2	15.6	15.7
Pennsylvania Wilds	1,926.6	20,161.9	656.3	163.2	169.5

Source: Tourism Economics

VALLEYS OF THE SUSQUEHANNA

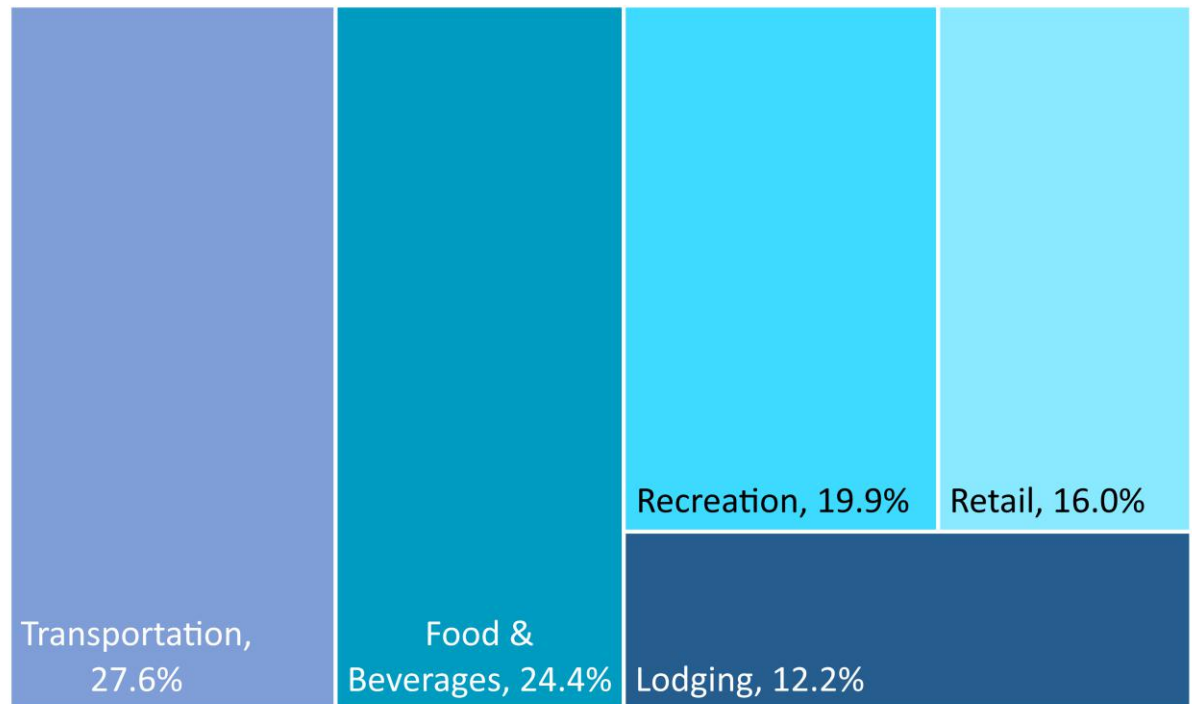
Overview

The Valleys of the Susquehanna region is comprised of Columbia, Montour, Northumberland, Snyder, and Union Counties.

Travelers spent close to \$672 million in the region in 2019 – a small 1.1% decrease from 2018’s record high.

As in prior years, the Valleys of the Susquehanna region continued to have the highest proportion of traveler dollars spent on food & beverages among the state’s 11 tourism regions. The region also continued to have the fourth highest share of total traveler spending on recreational activities in 2019.

Spending by category



Source: Tourism Economics

VALLEYS OF THE SUSQUEHANNA

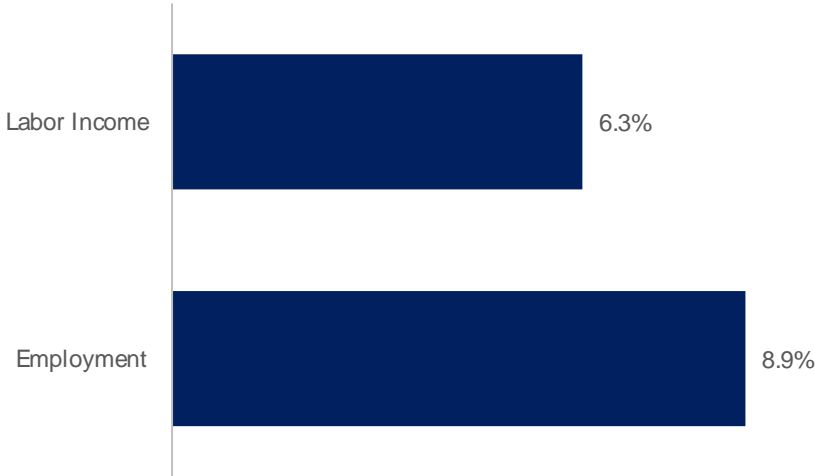
Travel and tourism impact on labor income and employment

The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.

The region continued to have the smallest number of travel-supported jobs and to rank 8th in travel-supported employment intensity among the state's 11 tourism regions in 2019. Nevertheless, travel and tourism supported one out of nine jobs in the region.

The travel industry was responsible for 6.3% of the region's labor income in 2019. Jobs directly supported by travel and tourism grew 1% from 2019, with associated labor income rising by 4.2% and by almost double that amount at 8.3% under the broadest measure (i.e., travel economy) with indirect and induced impacts included.

Travel and Tourism Industry Share of Regional Economy



Source: Tourism Economics, U.S. Bureau of Labor Statistics

VALLEYS OF THE SUSQUEHANNA

Timeline

Tourism Industry Spending

Amounts in millions of nominal dollars

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Columbia	\$114.5	\$127.6	\$150.5	\$150.6	\$153.7	\$153.7	\$151.9	\$154.2	\$167.7	\$178.3	\$171.0
Montour	\$79.2	\$88.0	\$97.3	\$105.3	\$102.3	\$97.3	\$96.1	\$94.4	\$97.9	\$100.5	\$95.6
Northumberland	\$99.1	\$113.3	\$118.3	\$118.3	\$124.3	\$125.1	\$129.8	\$133.1	\$138.1	\$137.9	\$140.5
Snyder	\$74.9	\$83.5	\$90.6	\$90.2	\$95.3	\$98.8	\$99.3	\$103.5	\$111.6	\$111.4	\$110.9
Union	\$115.7	\$124.3	\$147.8	\$157.5	\$149.2	\$142.7	\$142.6	\$142.0	\$150.0	\$151.0	\$153.6
Valleys of the Susquehanna	\$483.3	\$536.6	\$604.6	\$622.0	\$624.7	\$617.6	\$619.8	\$627.2	\$665.4	\$679.1	\$671.5
Percent Change		11.0%	12.7%	2.9%	0.4%	-1.1%	0.4%	1.2%	6.1%	2.0%	-1.1%

Tourism Industry Employment Impacts

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Columbia	1,141	1,171	1,217	1,258	1,291	1,290	1,292	1,302	1,339	1,369	1,364
Montour	800	823	839	863	884	889	902	926	937	965	973
Northumberland	943	988	1,013	1,050	1,066	1,078	1,101	1,107	1,128	1,129	1,152
Snyder	665	691	702	722	740	744	764	776	790	803	811
Union	1,098	1,126	1,152	1,188	1,224	1,229	1,216	1,243	1,271	1,293	1,314
Valleys of the Susquehanna	4,647	4,799	4,924	5,081	5,205	5,229	5,275	5,353	5,465	5,558	5,614
Percent Change		3.3%	2.6%	3.2%	2.4%	0.5%	0.9%	1.5%	2.1%	1.7%	1.0%

VALLEYS OF THE SUSQUEHANNA

Visitor Spending

Tourism Direct Sales (millions)

By County, 2019	Lodging	Food & beverages	Retail	Recreation	Transportation	Total
Columbia	23.6	44.4	26.6	30.0	46.4	171.0
Montour	14.5	22.1	14.6	18.7	25.7	95.6
Northumberland	4.6	27.1	17.4	40.4	51.0	140.5
Snyder	14.0	27.8	20.9	22.5	25.7	110.9
Union	25.2	42.4	27.7	21.9	36.5	153.6
Valleys of the Susquehanna	81.8	163.8	107.2	133.4	185.3	671.5
Percent Change	-5.5%	0.6%	-1.3%	1.1%	-2.0%	-1.1%
By County, 2018						
Columbia	26.2	45.2	27.9	30.4	48.6	178.3
Montour	16.2	22.7	15.6	19.0	27.0	100.5
Northumberland	4.4	26.1	16.8	40.1	50.6	137.9
Snyder	14.6	27.8	20.9	21.8	26.3	111.4
Union	25.2	41.0	27.5	20.6	36.7	151.0
Valleys of the Susquehanna	86.6	162.8	108.6	132.0	189.1	679.1

Source: Tourism Economics

VALLEYS OF THE SUSQUEHANNA

TSA Categories

Tourism Satellite Account (millions)

By County, 2019	Visitor Spending	Government	Investment/ PCE	Total Tourism Demand
Columbia	171.0	0.5	9.9	181.4
Montour	95.6	0.3	5.5	101.5
Northumberland	140.5	0.2	8.1	148.8
Snyder	110.9	0.3	6.4	117.6
Union	153.6	0.9	8.9	163.3
Valleys of the Susquehanna	671.5	2.2	38.9	712.6
Percent Change	-1.1%	7.5%	-3.7%	-1.2%
By County, 2018				
Columbia	178.3	0.6	10.6	189.5
Montour	100.5	0.4	6.0	106.8
Northumberland	137.9	0.2	8.2	146.3
Snyder	111.4	0.3	6.6	118.4
Union	151.0	0.6	9.0	160.5
Valleys of the Susquehanna	679.1	2.1	40.4	721.5

Source: Tourism Economics

VALLEYS OF THE SUSQUEHANNA

Direct Impacts

Tourism Industry (direct) Impacts (millions, except Employment (in units))

By County, 2019	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Columbia	171.0	1,364	35.5	9.0	8.2
Montour	95.6	973	25.6	5.6	5.4
Northumberland	140.5	1,152	34.5	7.6	7.5
Snyder	110.9	811	19.2	5.5	4.8
Union	153.6	1,314	34.6	8.7	7.8
Valleys of the Susquehanna	671.5	5,614	149.3	36.3	33.6
Percent Change	-1.1%	1.0%	4.2%	0.7%	1.9%
By County, 2018					
Columbia	178.3	1,369	34.1	9.2	8.2
Montour	100.5	965	24.7	5.7	5.3
Northumberland	137.9	1,129	33.3	7.4	7.3
Snyder	111.4	803	18.6	5.4	4.7
Union	151.0	1,293	32.6	8.2	7.5
Valleys of the Susquehanna	679.1	5,558	143.4	36.0	33.0

Source: Tourism Economics

VALLEYS OF THE SUSQUEHANNA

Total Impacts

Total Tourism Economy Impacts (millions, except Employment (in units))

By County, 2019	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Columbia	181.4	2,186	69.1	15.6	16.5
Montour	101.5	1,416	51.6	9.7	10.8
Northumberland	148.8	2,042	65.3	13.5	15.0
Snyder	117.6	1,327	39.8	9.5	9.7
Union	163.3	2,043	70.5	14.9	15.6
Valleys of the Susquehanna	712.6	9,014	296.3	63.2	67.7
Percent Change	-1.2%	2.8%	8.3%	0.6%	2.0%
By County, 2018					
Columbia	189.5	2,147	63.5	16.0	16.5
Montour	106.8	1,376	47.5	9.9	10.8
Northumberland	146.3	1,973	60.5	13.2	14.6
Snyder	118.4	1,298	37.8	9.5	9.5
Union	160.5	1,977	64.2	14.3	15.0
Valleys of the Susquehanna	721.5	8,771.8	273.6	62.8	66.4

Source: Tourism Economics

THE ALLEGHENIES

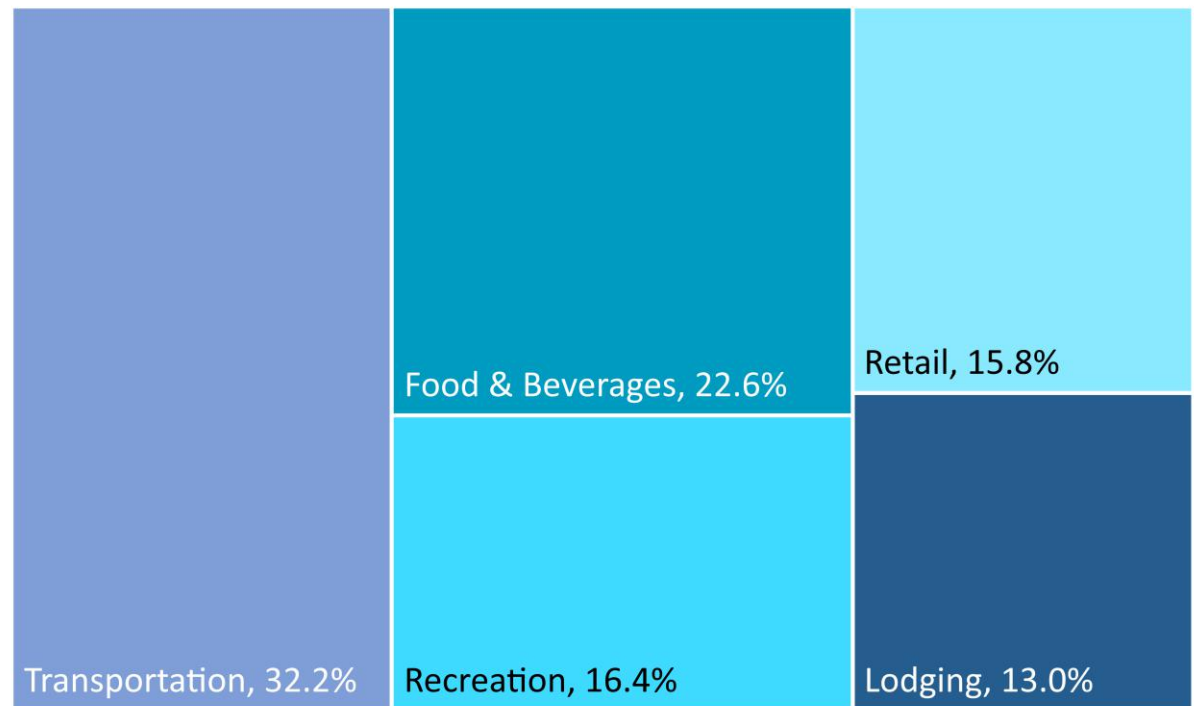
Overview

The Alleghenies is comprised of Bedford, Blair, Cambria, Centre, Fulton, Huntingdon, Juniata, and Mifflin Counties.

Travelers spent over \$2.1 billion in The Alleghenies region in 2019 – a 1.4% increase from 2018 and new record high.

Visitors to the region continued to spend a relatively high percentage of their trip dollars on transportation – ranking third among the state’s 11 tourism regions in the share of dollars spent on this category in 2019, and far less on shopping and recreation purchases with rankings of 9th and 10th, respectively, as in 2018.

Spending by category



Source: Tourism Economics

THE ALLEGHENIES

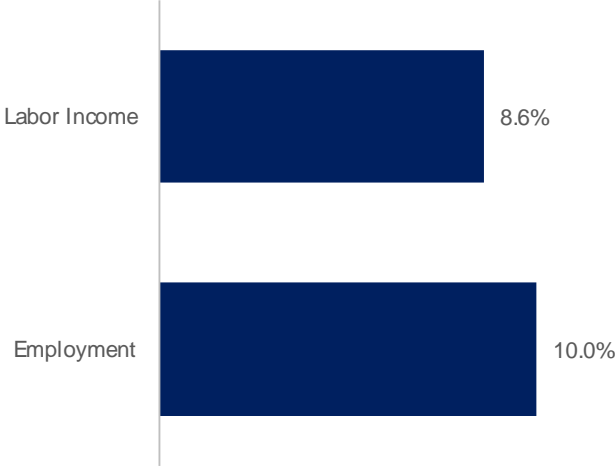
Travel and tourism impact on labor income and employment

The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.

Travel and tourism supported 10% of the region's employment and 8.6% of the labor income generated in the region.

The region continued to rank 8th among the state's 11 tourism regions in the number of jobs supported by the travel and tourism industry and 5th in employment intensity (i.e., the percentage of travel-supported jobs relative to the region's total employment number) in 2019.

Travel and Tourism Industry Share of Regional Economy



Source: Tourism Economics, U.S. Bureau of Labor Statistics

THE ALLEGHENIES

Timeline

Tourism Industry Spending

Amounts in millions of nominal dollars

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Bedford	\$239.0	\$263.0	\$274.7	\$280.2	\$282.9	\$284.0	\$284.9	\$287.3	\$297.4	\$308.4	\$307.1
Blair	\$249.3	\$271.2	\$295.3	\$307.4	\$309.6	\$313.2	\$324.9	\$335.2	\$358.0	\$358.1	\$374.4
Cambria	\$238.5	\$257.6	\$290.5	\$303.4	\$301.0	\$303.2	\$308.1	\$310.9	\$315.8	\$316.4	\$310.7
Centre	\$545.6	\$588.7	\$649.3	\$654.3	\$694.1	\$720.4	\$741.8	\$748.5	\$794.2	\$809.1	\$823.4
Fulton	\$17.4	\$19.3	\$21.7	\$23.7	\$23.5	\$23.2	\$23.3	\$23.5	\$24.7	\$25.3	\$26.1
Huntingdon	\$129.1	\$144.1	\$153.1	\$162.8	\$161.7	\$160.4	\$163.9	\$166.5	\$173.0	\$176.6	\$178.6
Juniata	\$28.5	\$31.0	\$34.8	\$36.3	\$36.8	\$36.5	\$37.2	\$36.7	\$36.7	\$36.8	\$35.9
Mifflin	\$54.4	\$58.9	\$62.8	\$63.5	\$64.9	\$65.2	\$65.2	\$72.0	\$66.4	\$69.4	\$72.9
The Alleghenies	\$1,501.9	\$1,633.9	\$1,782.3	\$1,831.6	\$1,874.4	\$1,906.1	\$1,949.2	\$1,980.7	\$2,066.1	\$2,100.0	\$2,129.1
Percent Change		8.8%	9.1%	2.8%	2.3%	1.7%	2.3%	1.6%	4.3%	1.6%	1.4%

Tourism Industry Employment Impacts

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Bedford	1,977	2,026	2,015	1,967	1,978	2,004	2,042	2,054	2,080	2,174	2,172
Blair	2,446	2,499	2,544	2,554	2,609	2,588	2,665	2,758	2,796	2,779	2,841
Cambria	2,021	2,005	2,021	2,064	2,053	2,042	2,025	2,061	2,047	2,076	2,090
Centre	4,641	4,705	4,765	4,835	4,923	4,875	4,935	5,004	5,049	5,120	5,219
Fulton	143	152	152	154	155	156	158	161	167	174	177
Huntingdon	1,221	1,273	1,308	1,292	1,329	1,335	1,356	1,394	1,421	1,444	1,470
Juniata	239	218	219	222	223	224	226	231	232	233	230
Mifflin	567	583	589	598	605	608	618	641	651	663	688
The Alleghenies	13,254	13,460	13,614	13,687	13,876	13,833	14,024	14,306	14,443	14,665	14,888
Percent Change		1.6%	1.1%	0.5%	1.4%	-0.3%	1.4%	2.0%	1.0%	1.5%	1.5%

Source: Tourism Economics

THE ALLEGHENIES

Visitor Spending

Tourism Direct Sales (millions)

By County, 2019	Lodging	Food & beverages	Retail	Recreation	Transportation	Total
Bedford	46.2	64.8	46.1	50.2	99.8	307.1
Blair	38.7	82.0	60.4	61.1	132.3	374.4
Cambria	24.2	65.7	46.6	50.8	123.3	310.7
Centre	142.8	193.2	132.3	128.5	226.7	823.4
Fulton	2.4	5.9	4.5	4.9	8.3	26.1
Huntingdon	14.7	42.3	28.1	34.9	58.6	178.6
Juniata	1.1	8.6	6.3	7.0	12.8	35.9
Mifflin	6.8	19.6	12.0	11.2	23.3	72.9
The Alleghenies	276.9	482.2	336.4	348.6	685.0	2,129.1
Percent Change	-0.3%	2.6%	0.5%	4.9%	0.0%	1.4%
By County, 2018						
Bedford	47.9	64.3	46.8	49.4	100.0	308.4
Blair	35.2	77.2	58.2	55.8	131.7	358.1
Cambria	25.8	65.5	48.2	50.5	126.4	316.4
Centre	143.9	189.1	131.0	120.7	224.4	809.1
Fulton	2.4	5.7	4.4	4.6	8.1	25.3
Huntingdon	15.0	41.1	28.3	33.5	58.7	176.6
Juniata	1.4	8.7	6.3	7.4	12.9	36.8
Mifflin	6.2	18.5	11.6	10.4	22.7	69.4
The Alleghenies	277.7	470.1	334.8	332.4	685.0	2,100.0

Source: Tourism Economics

THE ALLEGHENIES

TSA Categories

Tourism Satellite Account (millions)

By County, 2019	Visitor Spending	Government	Investment/ PCE	Total Tourism Demand
Bedford	307.1	0.7	17.8	325.6
Blair	374.4	1.5	21.7	397.6
Cambria	310.7	0.7	18.0	329.4
Centre	823.4	2.8	47.7	873.9
Fulton	26.1	0.0	1.5	27.6
Huntingdon	178.6	0.5	10.3	189.5
Juniata	35.9	0.1	2.1	38.0
Mifflin	72.9	0.3	4.2	77.4
The Alleghenies	2,129.1	6.7	123.2	2,259.0
Percent Change	1.4%	0.3%	-1.3%	1.2%
By County, 2018				
Bedford	308.4	0.7	18.3	327.4
Blair	358.1	1.3	21.3	380.7
Cambria	316.4	1.0	18.8	336.2
Centre	809.1	2.7	48.1	859.9
Fulton	25.3	0.0	1.5	26.8
Huntingdon	176.6	0.5	10.5	187.6
Juniata	36.8	0.1	2.2	39.0
Mifflin	69.4	0.2	4.1	73.7
The Alleghenies	2,100.0	6.6	124.8	2,231.5

Source: Tourism Economics

THE ALLEGHENIES

Direct Impacts **Tourism Industry (direct) Impacts** (millions, except Employment (in units))

By County, 2019	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Bedford	307.1	2,172	63.4	15.9	14.7
Blair	374.4	2,841	88.9	21.0	19.5
Cambria	310.7	2,090	76.3	17.2	16.5
Centre	823.4	5,219	171.5	43.5	39.7
Fulton	26.1	177	4.3	1.2	1.1
Huntingdon	178.6	1,470	40.8	9.7	9.1
Juniata	35.9	230	5.5	1.7	1.5
Mifflin	72.9	688	16.7	4.0	3.7
The Alleghenies	2,129.1	14,888	467.6	114.1	105.8
Percent Change	1.4%	1.5%	4.7%	2.2%	3.5%
By County, 2018					
Bedford	308.4	2,174	61.7	15.8	14.5
Blair	358.1	2,779	84.8	19.9	18.6
Cambria	316.4	2,076	73.2	17.4	16.2
Centre	809.1	5,120	162.8	42.4	38.2
Fulton	25.3	174	4.1	1.2	1.1
Huntingdon	176.6	1,444	38.9	9.5	8.8
Juniata	36.8	233	5.5	1.7	1.5
Mifflin	69.4	663	15.8	3.8	3.5
The Alleghenies	2,100.0	14,665	446.8	111.7	102.3

THE ALLEGHENIES

Total Impacts

Total Tourism Economy Impacts (millions, except Employment (in units))

By County, 2019	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Bedford	325.6	3,179	120.3	27.8	29.6
Blair	397.6	4,514	169.3	36.4	39.3
Cambria	329.4	3,567	142.3	30.1	33.3
Centre	873.9	7,957	339.1	75.6	79.9
Fulton	27.6	313	8.3	2.1	2.2
Huntingdon	189.5	2,265	77.9	16.9	18.3
Juniata	38.0	481	10.7	2.9	3.0
Mifflin	77.4	1,194	33.2	7.0	7.5
The Alleghenies	2,259.0	23,470	901.1	198.9	213.1
Percent Change	1.2%	3.2%	8.5%	2.3%	3.5%
By County, 2018					
Bedford	327.4	3,120	112.4	27.7	29.2
Blair	380.7	4,348	155.9	34.7	37.4
Cambria	336.2	3,495	131.2	30.3	32.6
Centre	859.9	7,681	310.3	73.6	76.8
Fulton	26.8	304	7.7	2.1	2.1
Huntingdon	187.6	2,185	72.3	16.5	17.7
Juniata	39.0	477	10.2	3.0	3.0
Mifflin	73.7	1,136	30.2	6.7	7.1
The Alleghenies	2,231.5	22,744.8	830.2	194.5	205.9

Source: Tourism Economics

DUTCH COUNTRY ROADS

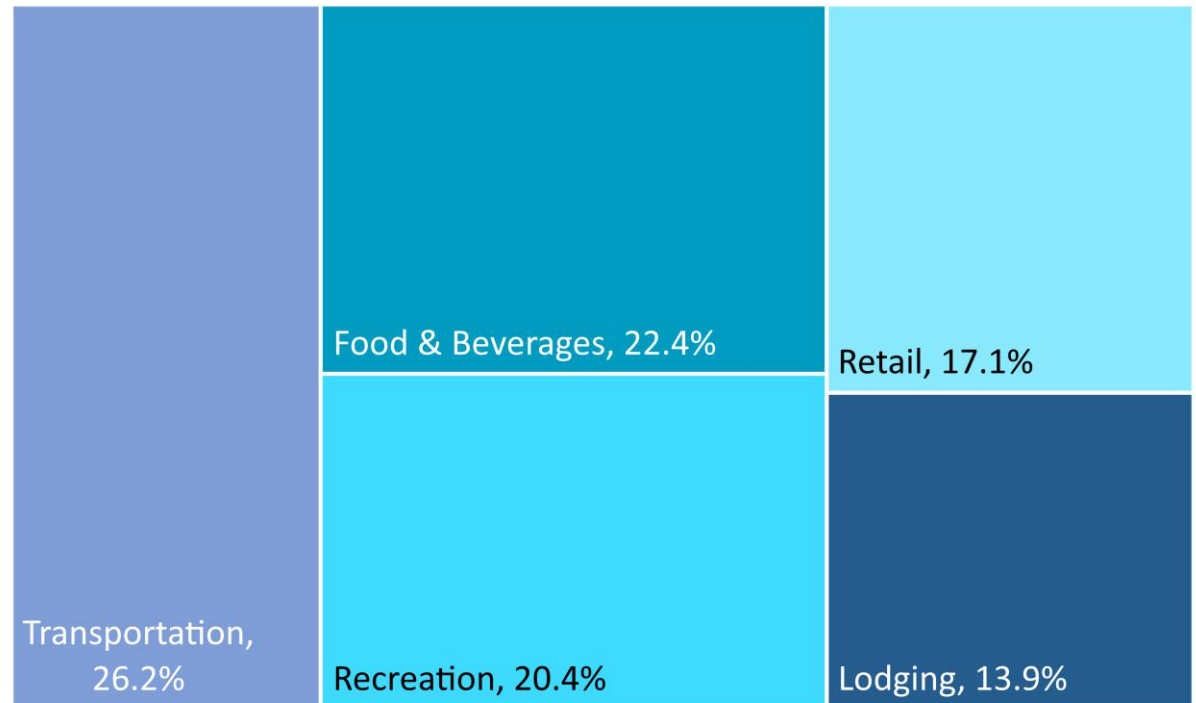
Overview

The Dutch Country Roads region is comprised of Adams, Berks, Cumberland, Dauphin, Franklin, Lancaster, Lebanon, Perry, and York Counties.

Travelers spent almost \$9.1 billion in the Dutch Country Roads region in 2019 – the second highest amount of the state’s 11 tourism regions, a 2.2% increase from 2018, and new record high.

Shopping and recreation continued to be equally important to the region’s travelers with the region ranking third among the state’s 11 tourism regions in the share of travel budgets going to each of these two spending categories in 2019, and fourth in the lodging spend. In contrast, the region continued to rank 10th in the share of trip budgets allocated to transportation.

Spending by category



Source: Tourism Economics

DUTCH COUNTRY ROADS

Travel and tourism impact on labor income and employment

The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.

The region continued to have the second highest number of jobs directly supported by travel and tourism among the state's 11 tourism regions in 2019, and to rank 6th in employment intensity.

The proportion of labor income derived from the region's travel and tourism industry was 8.1% in 2019. Jobs directly supported by travel and tourism grew 1.8% from 2018, with associated labor income rising by 5.5% and by 9.7% under the broadest measure (i.e., travel economy) with indirect and induced impacts included.

Travel and Tourism Industry Share of Regional Economy



Source: Tourism Economics, U.S. Bureau of Labor Statistics

DUTCH COUNTRY ROADS

Timeline

Tourism Industry Spending

Amounts in millions of nominal dollars

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Adams	\$520.9	\$555.8	\$608.0	\$628.8	\$671.8	\$666.0	\$686.7	\$691.2	\$725.9	\$735.0	\$750.7
Berks	\$623.7	\$687.7	\$762.7	\$794.8	\$807.3	\$795.9	\$824.4	\$857.0	\$901.9	\$930.7	\$950.1
Cumberland	\$628.3	\$677.8	\$726.7	\$749.8	\$760.3	\$774.1	\$816.6	\$838.7	\$881.8	\$892.8	\$897.2
Dauphin	\$1,878.7	\$2,013.3	\$2,135.1	\$2,213.7	\$2,286.3	\$2,315.3	\$2,335.9	\$2,356.1	\$2,459.6	\$2,476.3	\$2,566.3
Franklin	\$270.2	\$286.5	\$298.0	\$314.8	\$323.4	\$324.2	\$326.7	\$317.6	\$327.5	\$332.6	\$337.5
Lancaster	\$1,523.1	\$1,669.7	\$1,792.7	\$1,817.5	\$1,854.9	\$1,920.2	\$1,975.4	\$2,065.5	\$2,138.4	\$2,200.1	\$2,229.6
Lebanon	\$159.9	\$170.9	\$185.6	\$192.6	\$193.9	\$200.9	\$201.4	\$205.6	\$217.8	\$249.0	\$256.6
Perry	\$40.6	\$43.6	\$48.7	\$46.8	\$46.9	\$47.4	\$47.9	\$48.3	\$49.6	\$50.6	\$52.4
York	\$706.5	\$753.5	\$850.2	\$885.1	\$907.5	\$923.1	\$943.7	\$973.5	\$1,016.3	\$1,019.6	\$1,041.6
Dutch Country Roads	\$6,351.8	\$6,858.9	\$7,407.6	\$7,643.8	\$7,852.4	\$7,967.1	\$8,158.8	\$8,353.7	\$8,718.8	\$8,886.8	\$9,081.9
Percent Change		8.0%	8.0%	3.2%	2.7%	1.5%	2.4%	2.4%	4.4%	1.9%	2.2%

Source: Tourism Economics

DUTCH COUNTRY ROADS

Timeline

Tourism Industry Employment Impacts

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Adams	4,835	4,771	4,788	4,866	5,080	5,074	5,105	5,199	5,272	5,343	5,392
Berks	6,067	6,173	6,238	6,468	6,577	6,564	6,622	6,828	6,901	7,051	7,165
Cumberland	5,909	5,812	5,935	6,068	6,152	6,215	6,239	6,304	6,442	6,554	6,592
Dauphin	17,583	17,735	17,887	18,533	18,724	18,709	18,846	19,036	19,368	19,382	19,818
Franklin	2,298	2,276	2,288	2,352	2,438	2,438	2,444	2,513	2,533	2,583	2,632
Lancaster	14,381	14,640	14,753	15,239	15,478	15,731	15,853	16,310	16,554	16,747	17,145
Lebanon	1,544	1,534	1,562	1,609	1,654	1,667	1,655	1,695	1,714	1,759	1,807
Perry	296	302	310	321	327	328	340	347	346	345	346
York	7,213	7,038	7,165	7,421	7,525	7,637	7,709	7,913	8,010	8,046	8,108
Dutch Country Roads	60,127	60,281	60,927	62,877	63,955	64,363	64,814	66,147	67,141	67,810	69,005
Percent Change		0.3%	1.1%	3.2%	1.7%	0.6%	0.7%	2.1%	1.5%	1.0%	1.8%

Source: Tourism Economics

DUTCH COUNTRY ROADS

Visitor Spending

Tourism Direct Sales
(millions)

By County, 2019	Lodging	Food & beverages	Retail	Recreation	Transportation	Total
Adams	100.2	157.9	134.6	183.5	174.5	750.7
Berks	105.0	223.1	171.8	170.6	279.7	950.1
Cumberland	126.2	219.4	147.8	157.4	246.4	897.2
Dauphin	425.2	516.0	377.8	624.1	623.3	2,566.3
Franklin	37.7	84.7	55.6	65.7	93.7	337.5
Lancaster	327.4	507.3	428.2	412.5	554.1	2,229.6
Lebanon	22.9	61.0	46.2	42.8	83.8	256.6
Perry	2.1	13.5	9.7	8.8	18.3	52.4
York	120.2	254.4	180.2	185.4	301.5	1,041.6
Dutch Country Roads	1,266.8	2,037.2	1,552.0	1,850.8	2,375.2	9,081.9
Percent Change	1.3%	3.2%	1.5%	4.9%	0.3%	2.2%
By County, 2018						
Adams	99.8	153.7	133.6	176.3	171.6	735.0
Berks	103.7	217.3	169.9	163.5	276.3	930.7
Cumberland	130.4	216.2	148.3	148.8	249.1	892.8
Dauphin	411.3	495.1	367.9	587.5	614.5	2,476.3
Franklin	37.7	82.0	54.9	63.5	94.6	332.6
Lancaster	324.6	490.8	421.9	399.5	563.3	2,200.1
Lebanon	21.6	58.0	45.1	39.5	84.8	249.0
Perry	2.0	13.1	9.4	8.3	17.8	50.6
York	119.3	247.2	178.2	177.8	297.1	1,019.6
Dutch Country Roads	1,250.4	1,973.5	1,529.2	1,764.6	2,369.2	8,886.8

DUTCH COUNTRY ROADS

TSA Categories **Tourism Satellite Account**
(millions)

By County, 2019	Visitor Spending	Government	Investment/ PCE	Total Tourism Demand
Adams	750.7	3.2	43.4	797.3
Berks	950.1	3.6	55.0	1,008.7
Cumberland	897.2	2.9	51.9	952.0
Dauphin	2,566.3	14.7	148.5	2,729.5
Franklin	337.5	1.3	19.5	358.3
Lancaster	2,229.6	10.8	129.0	2,369.5
Lebanon	256.6	0.9	14.9	272.4
Perry	52.4	0.0	3.0	55.4
York	1,041.6	4.3	60.3	1,106.2
Dutch Country Roads	9,081.9	41.8	525.6	9,649.3
Percent Change	2.2%	3.7%	-0.5%	2.0%
By County, 2018				
Adams	735.0	3.2	43.7	781.9
Berks	930.7	3.5	55.3	989.5
Cumberland	892.8	2.9	53.1	948.7
Dauphin	2,476.3	14.0	147.2	2,637.5
Franklin	332.6	1.3	19.8	353.7
Lancaster	2,200.1	10.4	130.8	2,341.3
Lebanon	249.0	0.8	14.8	264.6
Perry	50.6	0.0	3.0	53.7
York	1,019.6	4.2	60.6	1,084.4
Dutch Country Roads	8,886.8	40.3	528.3	9,455.4

Source: Tourism Economics

DUTCH COUNTRY ROADS

Tourism Industry (direct) Impacts

Direct Impacts

(millions, except Employment (in units))

By County, 2019	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Adams	750.7	5,392	172.1	41.7	38.3
Berks	950.1	7,165	225.6	53.1	49.5
Cumberland	897.2	6,592	199.0	48.3	44.9
Dauphin	2,566.3	19,818	744.1	160.8	151.7
Franklin	337.5	2,632	80.3	18.9	17.6
Lancaster	2,229.6	17,145	507.0	124.9	113.1
Lebanon	256.6	1,807	64.5	14.6	13.8
Perry	52.4	346	8.8	2.4	2.2
York	1,041.6	8,108	254.2	59.2	55.2
Dutch Country Roads	9,081.9	69,005	2,255.5	524.0	486.3
Percent Change	2.2%	1.8%	5.5%	3.2%	4.4%
By County, 2018					
Adams	735.0	5,343	163.8	40.6	36.8
Berks	930.7	7,051	215.9	51.7	47.8
Cumberland	892.8	6,554	191.2	47.6	43.6
Dauphin	2,476.3	19,382	700.2	154.1	144.0
Franklin	332.6	2,583	76.3	18.4	16.9
Lancaster	2,200.1	16,747	473.2	121.0	107.9
Lebanon	249.0	1,759	60.3	13.9	13.1
Perry	50.6	345	8.5	2.4	2.2
York	1,019.6	8,046	247.7	58.0	53.7
Dutch Country Roads	8,886.8	67,810	2,137.1	507.7	466.0

DUTCH COUNTRY ROADS

Total Impacts Total Tourism Economy Impacts (millions, except Employment (in units))

By County, 2019	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Adams	797.3	8,130	328.5	72.2	77.1
Berks	1,008.7	11,930	441.3	92.2	99.7
Cumberland	952.0	10,095	395.7	84.2	90.3
Dauphin	2,729.5	27,989	1,426.9	276.6	305.9
Franklin	358.3	4,389	154.8	32.8	35.4
Lancaster	2,369.5	26,079	979.2	215.1	227.9
Lebanon	272.4	3,164	123.7	25.4	27.9
Perry	55.4	753	17.4	4.3	4.5
York	1,106.2	13,379	504.0	102.6	111.2
Dutch Country Roads	9,649.3	105,907	4,371.6	905.5	979.9
Percent Change	2.0%	3.7%	9.7%	3.2%	4.4%
By County, 2018					
Adams	781.9	7,907	304.0	70.1	74.1
Berks	989.5	11,518	404.7	89.8	96.2
Cumberland	948.7	9,827	363.6	82.9	87.9
Dauphin	2,637.5	26,816	1,294.3	265.1	290.5
Franklin	353.7	4,246	141.9	31.9	34.0
Lancaster	2,341.3	24,998	882.7	208.3	217.2
Lebanon	264.6	3,035	111.3	24.3	26.4
Perry	53.7	739	16.2	4.2	4.4
York	1,084.4	13,036	467.6	100.5	108.3
Dutch Country Roads	9,455.4	102,122.3	3,986.3	877.1	939.0

POCONO MOUNTAINS

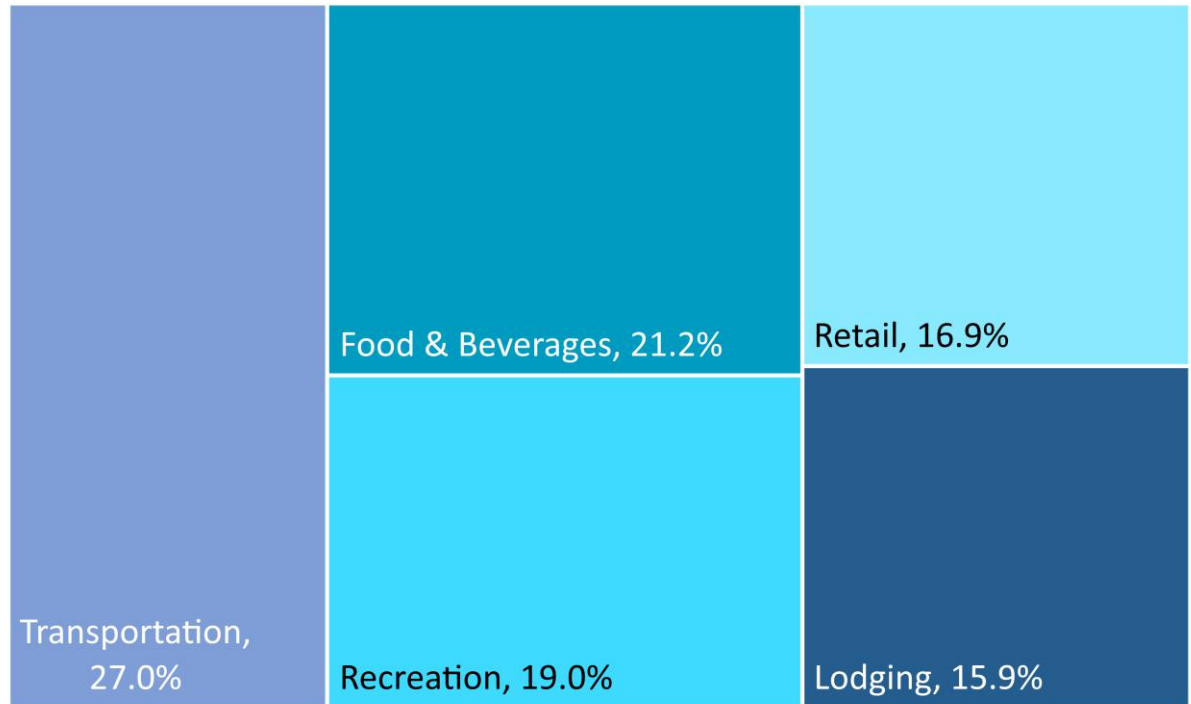
Overview

The Pocono Mountains region is comprised of Carbon, Monroe, Pike, and Wayne Counties.

Travelers spent more than \$4.2 billion in the Pocono Mountains region in 2019 – the fourth highest amount among the state’s 11 tourism regions, a 5.9% increase from 2018, and a new record high.

Lodging continued to be an especially important use of travelers’ trip budgets with the region continuing to rank second among the 11 tourism regions in terms of the percentage of total spending going to lodging. The region ranked 4th in the portion of trip budgets spent on retail purchases in 2019.

Spending by category



Source: Tourism Economics

POCONO MOUNTAINS

Travel and tourism impact on labor income and employment

The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.

Almost 45% of the region's labor income was derived from travel and tourism in 2019 – by far the highest percentage of the state's 11 tourism regions, while the employment share of the region's total grew to 39.0%.

Jobs directly supported by travel and tourism grew 2.3% from 2018, with associated labor income rising by 6.8% and by 10.8% under the broadest measure (i.e., travel economy) with indirect and induced impacts included.

The Pocono Mountains region was the only region where the travel-supported share of labor income exceeded the employment share, clearly illustrating the high-value jobs provided by the travel and tourism industry in this region.

Travel and Tourism Industry Share of Regional Economy



Source: Tourism Economics, U.S. Bureau of Labor Statistics

POCONO MOUNTAINS

Timeline

Tourism Industry Spending

Amounts in millions of nominal dollars

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Carbon	\$294.5	\$314.7	\$332.4	\$343.7	\$345.4	\$344.9	\$366.3	\$393.9	\$426.5	\$425.3	\$447.6
Monroe	\$1,372.6	\$1,502.1	\$1,552.0	\$1,607.5	\$1,596.5	\$1,606.3	\$1,788.2	\$2,034.7	\$2,300.5	\$2,351.7	\$2,509.2
Pike	\$520.7	\$538.0	\$553.5	\$575.1	\$606.0	\$607.1	\$636.6	\$663.7	\$691.9	\$720.9	\$737.3
Wayne	\$400.4	\$422.4	\$432.7	\$429.5	\$424.2	\$419.7	\$433.1	\$443.8	\$462.3	\$478.9	\$517.1
Pocono Mountains	\$2,588.2	\$2,777.2	\$2,870.7	\$2,955.9	\$2,972.1	\$2,978.0	\$3,224.2	\$3,536.1	\$3,881.2	\$3,976.9	\$4,211.2
Percent Change		7.3%	3.4%	3.0%	0.5%	0.2%	8.3%	9.7%	9.8%	2.5%	5.9%

Tourism Industry Employment Impacts

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Carbon	2,766	2,717	2,733	2,638	2,693	2,722	2,759	2,897	2,947	2,938	3,008
Monroe	12,780	12,937	13,011	12,847	12,912	12,890	13,411	14,051	14,488	14,464	14,749
Pike	5,257	4,856	4,852	4,760	4,853	4,922	5,084	5,229	5,322	5,457	5,574
Wayne	3,151	3,107	3,120	3,143	3,120	3,049	3,103	3,198	3,253	3,371	3,511
Pocono Mountains	23,954	23,617	23,717	23,388	23,579	23,582	24,358	25,375	26,011	26,231	26,842
Percent Change		-1.4%	0.4%	-1.4%	0.8%	0.0%	3.3%	4.2%	2.5%	0.8%	2.3%

POCONO MOUNTAINS

Visitor Spending

Tourism Direct Sales (millions)

By County, 2019	Lodging	Food & beverages	Retail	Recreation	Transportation	Total
Carbon	60.5	95.6	62.3	95.9	133.3	447.6
Monroe	455.9	518.6	456.1	484.8	593.8	2,509.2
Pike	97.5	163.7	113.0	124.0	239.0	737.3
Wayne	57.1	115.4	79.5	95.7	169.4	517.1
Pocono Mountains	671.0	893.4	710.9	800.4	1,135.5	4,211.2
Percent Change	9.2%	5.7%	5.1%	7.7%	3.4%	5.9%
By County, 2018						
Carbon	53.8	89.2	61.4	89.1	131.8	425.3
Monroe	415.7	490.8	429.8	449.7	565.8	2,351.7
Pike	94.4	158.3	110.9	118.1	239.2	720.9
Wayne	50.7	106.6	74.5	86.2	161.0	478.9
Pocono Mountains	614.6	844.9	676.6	743.0	1,097.8	3,976.9

Source: Tourism Economics

POCONO MOUNTAINS

TSA Categories

Tourism Satellite Account (millions)

By County, 2019	Visitor Spending	Government	Investment/ PCE	Total Tourism Demand
Carbon	447.6	1.2	25.9	474.7
Monroe	2,509.2	10.5	145.2	2,664.9
Pike	737.3	1.9	42.7	781.9
Wayne	517.1	1.0	29.9	548.0
Pocono Mountains	4,211.2	14.6	243.7	4,469.5
Percent Change	5.9%	13.4%	3.1%	5.8%
By County, 2018				
Carbon	425.3	1.0	25.3	451.7
Monroe	2,351.7	9.2	139.8	2,500.7
Pike	720.9	1.8	42.9	765.6
Wayne	478.9	0.8	28.5	508.2
Pocono Mountains	3,976.9	12.9	236.4	4,226.2

Source: Tourism Economics

POCONO MOUNTAINS

Direct Impacts

Tourism Industry (direct) Impacts (millions, except Employment (in units))

By County, 2019	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Carbon	447.6	3,008	78.6	22.0	19.6
Monroe	2,509.2	14,749	548.4	136.8	124.4
Pike	737.3	5,574	208.0	43.4	42.8
Wayne	517.1	3,511	119.6	27.6	26.5
Pocono Mountains	4,211.2	26,842	954.6	229.8	213.3
Percent Change	5.9%	2.3%	6.8%	6.5%	6.8%
By County, 2018					
Carbon	425.3	2,938	74.4	20.8	18.6
Monroe	2,351.7	14,464	512.6	127.5	115.9
Pike	720.9	5,457	196.7	41.9	40.9
Wayne	478.9	3,371	109.9	25.5	24.4
Pocono Mountains	3,976.9	26,231	893.5	215.8	199.8

Source: Tourism Economics

POCONO MOUNTAINS

Total Impacts

Total Tourism Economy Impacts (millions, except Employment (in units))

By County, 2019	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Carbon	474.7	4,548	152.4	38.4	39.4
Monroe	2,664.9	21,445	1,039.5	236.6	250.4
Pike	781.9	7,910	400.7	76.2	86.3
Wayne	548.0	5,179	221.8	48.7	53.4
Pocono Mountains	4,469.5	39,082	1,814.4	399.8	429.5
Percent Change	5.8%	4.4%	10.8%	6.4%	6.7%
By County, 2018					
Carbon	451.7	4,362	139.2	36.4	37.3
Monroe	2,500.7	20,614	934.8	221.0	233.4
Pike	765.6	7,589	364.5	73.6	82.5
Wayne	508.2	4,886	199.1	45.0	49.2
Pocono Mountains	4,226.2	37,451.7	1,637.6	376.0	402.4

Source: Tourism Economics

UPSTATE PA

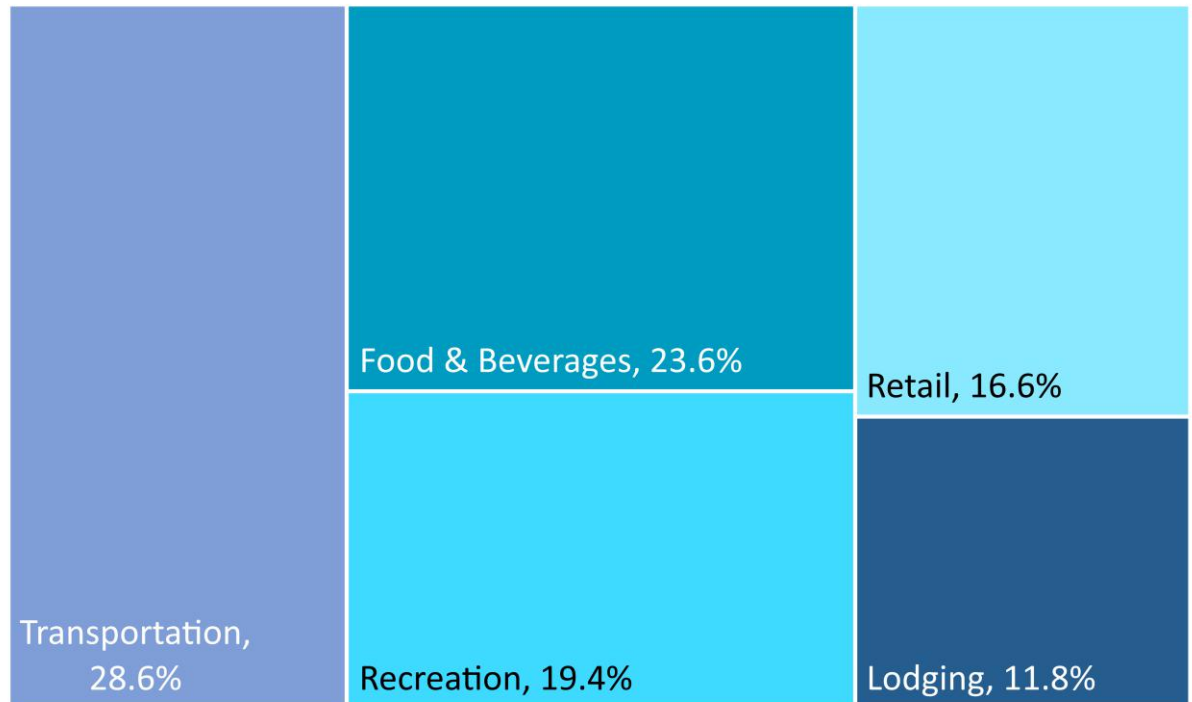
Overview

The Upstate PA region in northeastern Pennsylvania is comprised of the following counties: Bradford, Lackawanna, Luzerne, Schuylkill, Sullivan, Susquehanna, and Wyoming.

Travelers spent close to \$2.4 billion in the Upstate PA region in 2019 – a 2.2% increase from 2018 and a new record high.

Travelers to the Upstate PA region prioritized spending on food and beverage purchases, with the region ranking first among the state’s tourism regions in the percentage of trip dollars devoted to this spending category in 2019. This spending category also had the strongest percentage increase from 2018 at 2.9% followed by the 2.7% increase in spending on recreational activities.

Spending by category



Source: Tourism Economics

UPSTATE PA

Travel and tourism impact on labor income and employment

The chart shows the travel economy's share (including indirect and induced impacts) of the regional total for both labor income and employment.

The travel and tourism industry's share of the region's employment (i.e., employment intensity) was 7.0% in 2019, the lowest of the state's 11 tourism regions, while ranking 5th in the actual number of jobs supported by travel and tourism.

The travel-related labor income share for the Upstate PA region was 5.8% in 2019. Jobs directly supported by travel and tourism grew 1.2% from 2018, with associated labor income rising 4.4% and by 8.4% under the broadest measure (i.e., travel economy) with indirect and induced impacts included.

Travel and Tourism Industry Share of Regional Economy



Source: Tourism Economics, U.S. Bureau of Labor Statistics

UPSTATE PA

Timeline

Tourism Industry Spending

Amounts in millions of nominal dollars

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Bradford	\$136.3	\$170.0	\$200.5	\$225.3	\$223.1	\$227.6	\$211.8	\$196.0	\$206.1	\$217.8	\$214.7
Lackawanna	\$483.1	\$536.5	\$615.5	\$632.1	\$648.4	\$633.3	\$618.4	\$605.8	\$649.9	\$667.2	\$689.1
Luzerne	\$708.3	\$795.5	\$870.3	\$870.2	\$859.9	\$875.1	\$889.7	\$914.2	\$965.3	\$989.0	\$1,015.7
Schuylkill	\$158.5	\$159.2	\$176.8	\$195.7	\$196.3	\$199.0	\$206.2	\$206.2	\$216.5	\$223.5	\$222.1
Sullivan	\$13.1	\$16.0	\$18.7	\$19.7	\$19.1	\$18.6	\$17.6	\$17.7	\$20.3	\$21.9	\$21.5
Susquehanna	\$122.7	\$141.6	\$151.8	\$164.3	\$163.1	\$161.6	\$157.1	\$153.4	\$157.4	\$163.0	\$168.4
Wyoming	\$36.8	\$41.3	\$53.1	\$61.2	\$64.1	\$63.5	\$61.2	\$51.6	\$60.0	\$63.8	\$65.4
UPSTATEPA	\$1,658.6	\$1,860.2	\$2,086.6	\$2,168.5	\$2,174.1	\$2,178.7	\$2,161.8	\$2,144.9	\$2,275.5	\$2,346.2	\$2,396.7
Percent Change		12.2%	12.2%	3.9%	0.3%	0.2%	-0.8%	-0.8%	6.1%	3.1%	2.2%

Tourism Industry Employment Impacts

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Bradford	1,037	1,252	1,326	1,333	1,402	1,410	1,408	1,378	1,395	1,434	1,469
Lackawanna	4,563	4,752	4,882	5,006	5,131	5,183	5,117	5,056	5,182	5,294	5,439
Luzerne	5,978	6,275	6,534	6,619	6,754	7,056	7,068	7,151	7,227	7,284	7,259
Schuylkill	1,187	1,165	1,177	1,203	1,219	1,225	1,221	1,253	1,267	1,287	1,304
Sullivan	117	138	148	160	173	174	167	172	175	183	183
Susquehanna	1,002	1,024	1,061	1,060	1,105	1,110	1,096	1,116	1,129	1,172	1,202
Wyoming	365	362	379	400	421	423	417	404	412	424	434
UPSTATEPA	14,250	14,967	15,507	15,781	16,205	16,580	16,494	16,528	16,787	17,078	17,291
Percent Change		5.0%	3.6%	1.8%	2.7%	2.3%	-0.5%	0.2%	1.6%	1.7%	1.2%

Source: Tourism Economics

UPSTATE PA

Visitor Spending

Tourism Direct Sales (millions)

By County, 2019	Lodging	Food & beverages	Retail	Recreation	Transportation	Total
Bradford	23.6	49.0	32.9	37.5	71.8	214.7
Lackawanna	90.7	171.5	132.0	129.2	165.6	689.1
Luzerne	125.1	232.5	156.2	212.2	289.7	1,015.7
Schuylkill	19.1	56.4	36.1	36.3	74.3	222.1
Sullivan	3.0	3.9	3.0	6.0	5.6	21.5
Susquehanna	11.3	38.0	25.0	32.8	61.3	168.4
Wyoming	9.4	14.6	12.3	11.1	18.1	65.4
UPSTATEPA	282.0	565.8	397.5	465.0	686.3	2,396.7
Percent Change	1.1%	2.9%	0.9%	2.7%	2.3%	2.2%
By County, 2018						
Bradford	24.6	49.6	33.3	37.0	73.3	217.8
Lackawanna	88.4	165.5	130.5	119.7	163.1	667.2
Luzerne	122.1	223.8	154.7	213.2	275.3	989.0
Schuylkill	20.4	56.2	36.1	35.9	74.9	223.5
Sullivan	3.0	4.0	3.0	6.1	5.8	21.9
Susquehanna	11.0	36.7	24.2	30.4	60.7	163.0
Wyoming	9.4	14.1	12.2	10.6	17.6	63.8
UPSTATEPA	278.9	549.8	394.0	452.9	670.7	2,346.2

Source: Tourism Economics

UPSTATE PA

TSA Categories

Tourism Satellite Account (millions)

By County, 2019				Total
	Visitor Spending	Government	Investment/PCE	Tourism Demand
Bradford	214.7	0.6	12.4	227.7
Lackawanna	689.1	4.0	39.9	732.9
Luzerne	1,015.7	4.5	58.8	1,079.0
Schuylkill	222.1	0.7	12.9	235.6
Sullivan	21.5	0.1	1.2	22.8
Susquehanna	168.4	0.3	9.7	178.4
Wyoming	65.4	0.4	3.8	69.6
UPSTATEPA	2,396.7	10.5	138.7	2,545.9
Percent Change	2.2%	8.9%	-0.6%	2.0%
By County, 2018				
Bradford	217.8	0.6	12.9	231.3
Lackawanna	667.2	3.7	39.7	710.6
Luzerne	989.0	3.9	58.8	1,051.7
Schuylkill	223.5	0.7	13.3	237.6
Sullivan	21.9	0.1	1.3	23.3
Susquehanna	163.0	0.3	9.7	172.9
Wyoming	63.8	0.4	3.8	67.9
UPSTATEPA	2,346.2	9.6	139.5	2,495.4

Source: Tourism Economics

UPSTATE PA

Direct Impacts

Tourism Industry (direct) Impacts (millions, except Employment (in units))

By County, 2019	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Bradford	214.7	1,469	40.3	10.8	9.8
Lackawanna	689.1	5,439	150.2	38.7	34.1
Luzerne	1,015.7	7,259	251.7	58.4	54.3
Schuylkill	222.1	1,304	48.2	11.9	11.0
Sullivan	21.5	183	4.2	1.1	1.0
Susquehanna	168.4	1,202	30.4	8.2	7.5
Wyoming	65.4	434	12.0	3.4	2.9
UPSTATEPA	2,396.7	17,291	537.1	132.4	120.6
Percent Change	2.2%	1.2%	4.4%	3.6%	4.0%
By County, 2018					
Bradford	217.8	1,434	37.9	10.7	9.5
Lackawanna	667.2	5,294	140.0	36.7	32.1
Luzerne	989.0	7,284	245.6	56.3	52.7
Schuylkill	223.5	1,287	46.7	11.8	10.8
Sullivan	21.9	183	4.0	1.1	1.0
Susquehanna	163.0	1,172	28.7	7.9	7.1
Wyoming	63.8	424	11.5	3.4	2.9
UPSTATEPA	2,346.2	17,078	514.3	127.8	115.9

Source: Tourism Economics

UPSTATE PA

Total Impacts

Total Tourism Economy Impacts (millions, except Employment (in units))

By County, 2019	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Bradford	227.7	2,257	73.4	18.8	19.6
Lackawanna	732.9	8,424	295.7	66.0	68.7
Luzerne	1,079.0	11,644	498.1	101.0	109.4
Schuylkill	235.6	2,573	91.4	20.7	22.1
Sullivan	22.8	270	7.1	1.9	2.0
Susquehanna	178.4	1,873	55.6	14.4	15.1
Wyoming	69.6	706	23.2	5.9	5.9
UPSTATEPA	2,545.9	27,748	1,044.3	228.7	242.8
Percent Change	2.0%	2.9%	8.4%	3.4%	4.0%
By County, 2018					
Bradford	231.3	2,167	67.2	18.6	19.0
Lackawanna	710.6	8,094	265.9	62.6	64.5
Luzerne	1,051.7	11,459	466.5	97.7	106.2
Schuylkill	237.6	2,510	85.4	20.6	21.7
Sullivan	23.3	265	6.6	1.9	2.0
Susquehanna	172.9	1,795	50.9	13.9	14.3
Wyoming	67.9	679	21.1	5.8	5.7
UPSTATEPA	2,495.4	26,969.4	963.5	221.1	233.5

Source: Tourism Economics

LEHIGH VALLEY

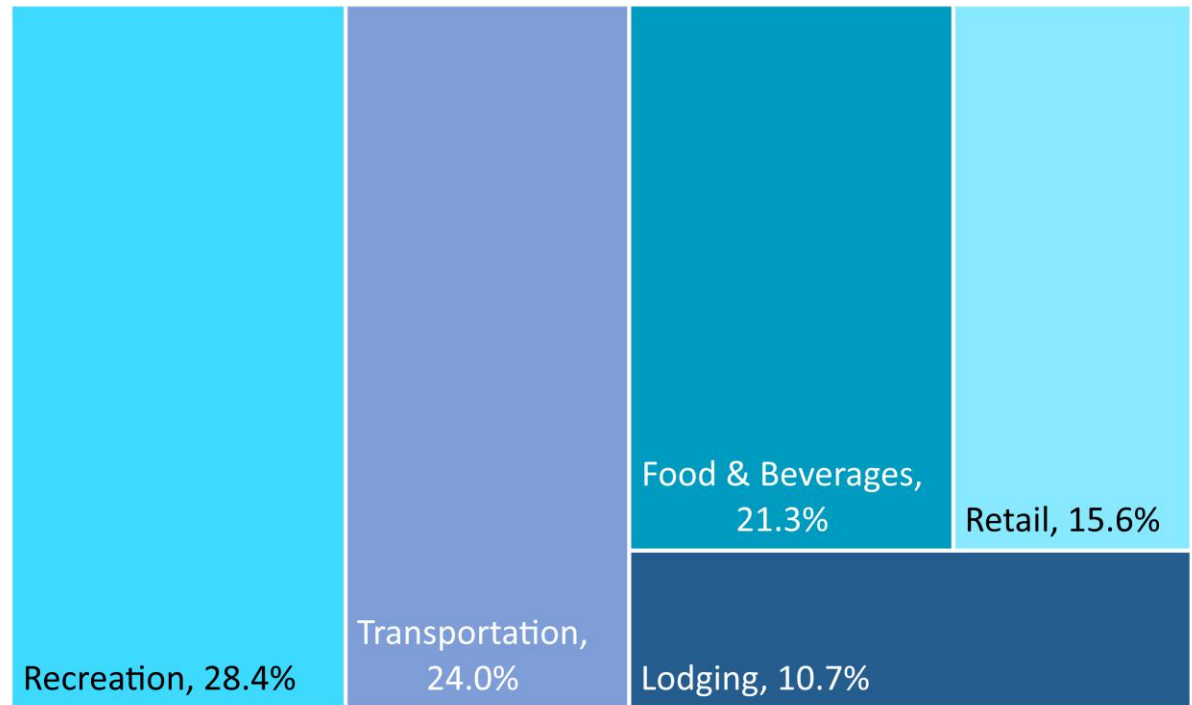
Overview

The Lehigh Valley region is comprised of Lehigh and Northampton Counties.

Visitor spending totaled nearly \$2.5 billion in 2019 – a 3.2% increase from 2018 and a new record high. The exceptionally strong 6.3% increase in spending on recreational activities helped drive the increase in overall spending, followed by food and beverage purchases at 2.5%.

The Lehigh Valley region ranked first among the 11 tourism regions in the proportion of trip dollars spent on recreation.

Spending by category



Source: Tourism Economics

LEHIGH VALLEY

Travel and tourism impact on labor income and employment

The chart shows the tourism economy (including indirect and induced impacts) share of the total region economy.

Travel and tourism supported 8.4% of employment in the region in 2019 – ranking ninth among the state’s tourism regions, but sixth in terms of the number of jobs supported by the industry. The industry accounted for 7.6% of the labor income generated in the region in 2019.

Jobs directly supported by travel and tourism grew 2.2% from 2018, with associated labor income rising 5.8% and by 9.8% under the broadest measure (i.e., travel economy) with indirect and induced impacts included.

Tourism Share of Regional Economy



Source: Tourism Economics, U.S. Bureau of Labor Statistics

LEHIGH VALLEY

Timeline

Tourism Industry Spending

Amounts in millions of nominal dollars

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Lehigh	\$872.1	\$925.4	\$996.3	\$1,030.7	\$1,041.7	\$1,054.7	\$1,127.8	\$1,169.4	\$1,240.9	\$1,313.5	\$1,359.1
Northampton	\$518.3	\$596.1	\$761.4	\$827.0	\$863.9	\$922.0	\$981.5	\$1,029.6	\$1,067.3	\$1,059.5	\$1,089.1
Lehigh Valley	\$1,390.4	\$1,521.4	\$1,757.7	\$1,857.7	\$1,905.6	\$1,976.7	\$2,109.4	\$2,199.0	\$2,308.2	\$2,373.0	\$2,448.1
Percent Change		9.4%	15.5%	5.7%	2.6%	3.7%	6.7%	4.3%	5.0%	2.8%	3.2%

Tourism Industry Employment Impacts

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Lehigh	7,732	7,555	7,624	7,838	7,970	7,983	8,119	8,356	8,590	8,667	8,844
Northampton	5,074	5,448	5,816	6,180	6,789	6,920	7,127	7,407	7,611	7,747	7,925
Lehigh Valley	12,806	13,003	13,440	14,018	14,760	14,903	15,246	15,764	16,201	16,414	16,769
Percent Change		1.5%	3.4%	4.3%	5.3%	1.0%	2.3%	3.4%	2.8%	1.3%	2.2%

Source: Tourism Economics

LEHIGH VALLEY

Visitor Spending

Tourism Direct Sales (millions)

By County, 2019	Lodging	Food & beverages	Retail	Recreation	Transportation	Total
Lehigh	152.5	316.5	250.4	283.5	356.1	1,359.1
Northampton	109.5	204.6	132.0	411.4	231.6	1,089.1
Lehigh Valley	262.1	521.1	382.3	694.9	587.8	2,448.1
Percent Change	1.0%	2.5%	2.2%	6.3%	1.8%	3.2%
By County, 2018						
Lehigh	150.9	311.5	244.2	261.6	345.3	1,313.5
Northampton	108.6	196.9	129.8	392.1	232.1	1,059.5
Lehigh Valley	259.5	508.4	374.0	653.7	577.4	2,373.0

Source: Tourism Economics

LEHIGH VALLEY

TSA Categories

Tourism Satellite Account (millions)

By County, 2019	Visitor Spending	Government	Investment/PCE	Tourism Demand	Total
Lehigh	1,359.1	4.6	78.6		1,442.3
Northampton	1,089.1	3.5	63.0		1,155.6
Lehigh Valley	2,448.1	8.1	141.7		2,597.9
Percent Change	3.2%	1.2%	0.4%		3.0%
By County, 2018					
Lehigh	1,313.5	4.6	78.1		1,396.2
Northampton	1,059.5	3.4	63.0		1,125.9
Lehigh Valley	2,373.0	8.0	141.1		2,522.1

Source: Tourism Economics

LEHIGH VALLEY

Direct Impacts

Tourism Industry (direct) Impacts (millions, except Employment (in units))

By County, 2019	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Lehigh	1,359.1	8,844	304.0	73.6	68.3
Northampton	1,089.1	7,925	353.9	69.0	69.5
Lehigh Valley	2,448.1	16,769	658.0	142.7	137.8
Percent Change	3.2%	2.2%	5.8%	3.6%	4.8%
By County, 2018					
Lehigh	1,313.5	8,667	288.4	71.1	65.2
Northampton	1,059.5	7,747	333.5	66.5	66.2
Lehigh Valley	2,373.0	16,414	622.0	137.7	131.4

Source: Tourism Economics

LEHIGH VALLEY

Total Impacts

Total Tourism Economy Impacts (millions, except Employment (in units))

By County, 2019	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Lehigh	1,442.3	13,924	596.7	128.2	137.5
Northampton	1,155.6	12,402	688.5	121.0	140.2
Lehigh Valley	2,597.9	26,325	1,285.3	249.3	277.7
Percent Change	3.0%	4.1%	9.8%	3.7%	4.8%
By County, 2018					
Lehigh	1,396.2	13,400	544.6	123.7	131.3
Northampton	1,125.9	11,898	626.3	116.6	133.6
Lehigh Valley	2,522.1	25,297.7	1,170.9	240.3	264.9

Source: Tourism Economics

PHILADELPHIA & COUNTRYSIDE

Overview

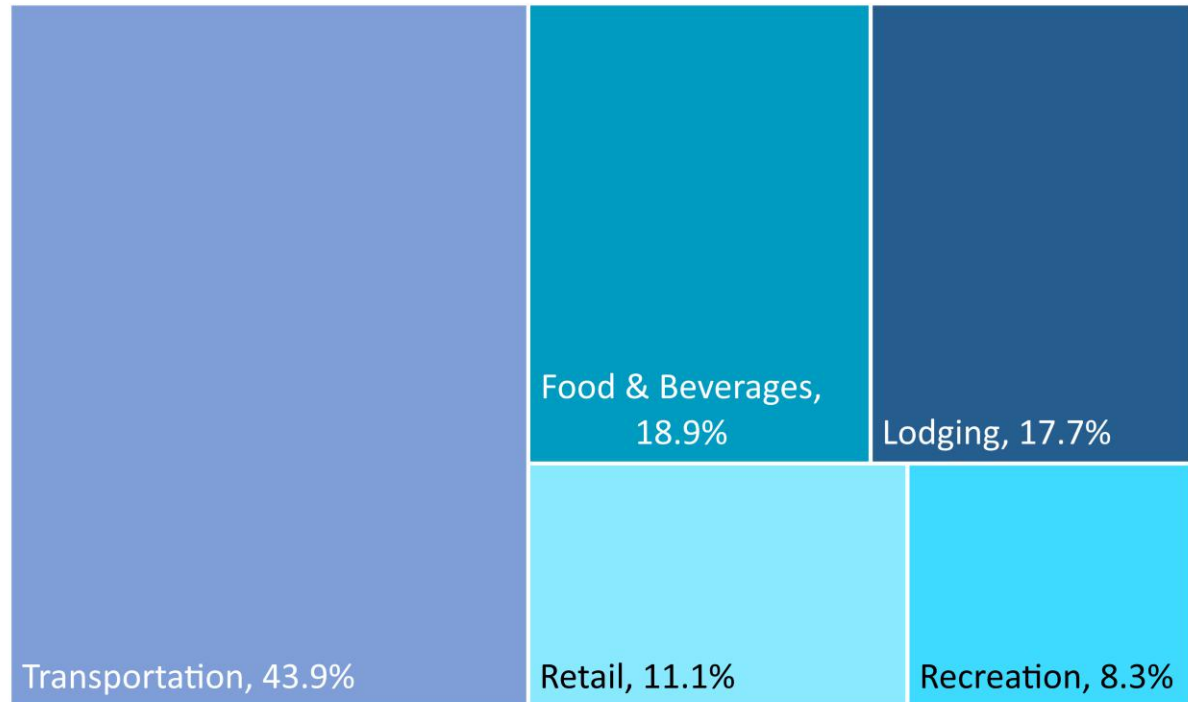
The Philadelphia and The Countryside region is comprised of Bucks, Chester, Delaware, Montgomery, and Philadelphia Counties.

Travelers spent close to \$10.9 billion in the region in 2019 – a new record high and a 3.3% increase from 2018.

Travelers spent more on transportation costs than any of the state's other tourism regions, with transportation accounting for almost 45% of travelers' trip dollars.

The region also led the state in the proportion of trip dollars spent on lodging, while ranking last in the share of visitor spending going to retail and food & beverage purchases and to recreational activities in 2019.

Spending by category



Source: Tourism Economics

PHILADELPHIA & COUNTRYSIDE

Travel and tourism impact on labor income and employment

The chart shows the tourism economy (including indirect and induced impacts) share of the total region economy.

Although the greater Philadelphia region led the state in the total number of jobs supported by travel and tourism at close to 80,000 jobs, as a result of the region's large and diverse economy the industry had the smallest share of employment supported by travel and tourism among the state's tourism regions.

Jobs directly supported by travel and tourism grew 2.1% from 2018, with associated labor income rising 5.2% and by 9.7% under the broadest measure (i.e., travel economy) with indirect and induced impacts included.

Travel and Tourism Industry Share of Regional Economy



Source: Tourism Economics, U.S. Bureau of Labor Statistics

PHILADELPHIA & COUNTRYSIDE

Timeline

Tourism Industry Spending

Amounts in millions of nominal dollars

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Bucks	\$629.2	\$673.2	\$728.0	\$743.6	\$742.1	\$760.4	\$795.5	\$813.9	\$831.7	\$877.2	\$913.8
Chester	\$608.2	\$646.7	\$684.2	\$713.8	\$730.4	\$736.2	\$760.1	\$772.6	\$800.2	\$847.2	\$865.2
Delaware	\$530.4	\$564.5	\$654.5	\$645.8	\$642.1	\$655.6	\$658.6	\$667.9	\$692.4	\$747.7	\$770.0
Montgomery	\$1,014.2	\$1,070.8	\$1,180.2	\$1,221.8	\$1,244.9	\$1,272.5	\$1,327.0	\$1,360.8	\$1,390.3	\$1,420.3	\$1,447.5
Philadelphia	\$4,736.2	\$5,044.0	\$5,290.9	\$5,389.9	\$5,590.6	\$5,698.5	\$5,836.8	\$6,074.3	\$6,298.9	\$6,658.5	\$6,898.8
Philadelphia & The Countryside	\$7,518.1	\$7,999.1	\$8,537.9	\$8,714.9	\$8,950.1	\$9,123.1	\$9,378.1	\$9,689.5	\$10,013.5	\$10,550.9	\$10,895.3
Percent Change		6.4%	6.7%	2.1%	2.7%	1.9%	2.8%	3.3%	3.3%	5.4%	3.3%

Tourism Industry Employment Impacts

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Bucks	8,482	8,389	8,568	8,717	8,776	8,850	8,999	9,161	9,235	9,418	9,614
Chester	6,983	6,823	6,879	7,052	7,176	7,288	7,397	7,499	7,679	7,845	8,015
Delaware	6,701	6,697	6,936	7,158	7,360	7,486	7,535	7,696	7,850	8,006	8,149
Montgomery	12,380	12,159	12,337	13,008	13,366	13,430	13,618	13,965	14,147	14,318	14,636
Philadelphia	31,929	32,221	32,669	33,628	34,415	34,803	35,577	36,361	37,046	37,953	38,748
Philadelphia & The Countryside	66,474	66,289	67,390	69,563	71,093	71,857	73,127	74,683	75,958	77,540	79,162
Percent Change		-0.3%	1.7%	3.2%	2.2%	1.1%	1.8%	2.1%	1.7%	2.1%	2.1%

Source: Tourism Economics

PHILADELPHIA & COUNTRYSIDE

Visitor Spending

Tourism Direct Sales (millions)

By County, 2019	Lodging	Food & beverages	Retail	Recreation	Transportation	Total
Bucks	161.7	208.7	127.7	97.2	318.5	913.8
Chester	159.2	199.3	129.0	94.7	283.0	865.2
Delaware	133.2	187.6	110.7	83.9	254.7	770.0
Montgomery	363.6	293.4	179.9	108.4	502.2	1,447.5
Philadelphia	1,113.3	1,172.9	664.4	522.7	3,425.5	6,898.8
Philadelphia & The Countryside	1,931.0	2,061.8	1,211.7	906.8	4,784.0	10,895.3
Percent Change	3.3%	4.4%	2.7%	5.9%	2.4%	3.3%
By County, 2018						
Bucks	154.5	199.3	124.3	91.7	307.5	877.2
Chester	157.7	193.0	126.8	89.4	280.3	847.2
Delaware	127.4	178.8	106.6	82.1	252.7	747.7
Montgomery	359.3	283.8	174.0	103.2	500.0	1,420.3
Philadelphia	1,070.7	1,119.8	647.8	489.6	3,330.6	6,658.5
Philadelphia & The Countryside	1,869.7	1,974.7	1,179.5	855.9	4,671.1	10,550.9

Source: Tourism Economics

PHILADELPHIA & COUNTRYSIDE

TSA Categories

Tourism Satellite Account (millions)

By County, 2019	Visitor Spending	Government	Investment/ PCE	Total Tourism Demand
Bucks	913.8	6.4	52.9	973.0
Chester	865.2	6.2	50.1	921.5
Delaware	770.0	3.4	44.6	818.0
Montgomery	1,447.5	10.6	83.8	1,541.8
Philadelphia	6,898.8	82.6	399.2	7,380.6
Philadelphia & The Countryside	10,895.3	109.2	630.5	11,635.0
Percent Change	3.3%	6.0%	0.5%	3.1%
By County, 2018				
Bucks	877.2	6.0	52.2	935.4
Chester	847.2	6.0	50.4	903.6
Delaware	747.7	3.5	44.5	795.7
Montgomery	1,420.3	10.3	84.4	1,515.0
Philadelphia	6,658.5	77.3	395.9	7,131.6
Philadelphia & The Countryside	10,550.9	103.1	627.3	11,281.3

Source: Tourism Economics

PHILADELPHIA & COUNTRYSIDE

Direct Impacts

Tourism Industry (direct) Impacts (millions, except Employment (in units))

By County, 2019	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Bucks	913.8	9,614	324.7	63.9	62.0
Chester	865.2	8,015	298.3	59.8	57.5
Delaware	770.0	8,149	343.6	58.3	61.6
Montgomery	1,447.5	14,636	579.4	107.7	106.9
Philadelphia	6,898.8	38,748	2,285.4	501.6	445.8
Philadelphia & The Countryside	10,895.3	79,162	3,831.5	791.3	733.7
Percent Change	3.3%	2.1%	5.2%	3.9%	4.5%
By County, 2018					
Bucks	877.2	9,418	307.1	61.0	58.9
Chester	847.2	7,845	285.7	58.2	55.5
Delaware	747.7	8,006	324.8	56.2	58.7
Montgomery	1,420.3	14,318	551.5	104.7	102.8
Philadelphia	6,658.5	37,953	2,173.9	481.1	426.5
Philadelphia & The Countryside	10,550.9	77,540	3,643.1	761.2	702.3

Source: Tourism Economics

PHILADELPHIA & COUNTRYSIDE

Total Impacts

Total Tourism Economy Impacts (millions, except Employment (in units))

By County, 2019	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Bucks	973.0	16,969	640.8	109.6	125.2
Chester	921.5	13,967	586.1	102.5	116.1
Delaware	818.0	14,316	651.4	102.1	124.5
Montgomery	1,541.8	25,025	1,129.8	185.0	216.0
Philadelphia	7,380.6	62,018	4,316.2	834.4	899.9
Philadelphia & The Countryside	11,635.0	132,295	7,324.4	1,333.5	1,481.7
Percent Change	3.1%	4.0%	9.7%	3.8%	4.5%
By County, 2018					
Bucks	935.4	16,376	583.9	104.8	119.0
Chester	903.6	13,458	538.7	99.7	112.1
Delaware	795.7	13,820	593.2	98.3	118.6
Montgomery	1,515.0	24,065	1,027.6	179.7	207.8
Philadelphia	7,131.6	59,538	3,931.6	801.6	860.9
Philadelphia & The Countryside	11,281.3	127,258	6,675.0	1,284.1	1,418.4

Source: Tourism Economics

KEY DEFINITIONS

Key Definitions

1. **Tourism/Tourist:** Refers to the leisure travel/traveler segment.
2. **Travel/Traveler:** Includes both leisure and business travel/travelers.
3. **Travel and Tourism Industry:** The value of traveler activity within “travel characteristic industries.” This concept measures only the direct impact of the travel industry from the sales made to travelers.
4. **Travel and Tourism Economy:** The value of traveler activity plus government spending and capital investment in support of travel and tourism and certain personal consumption expenditures. This is the basis of the total economic impact analysis, including the direct impact and the downstream indirect and induced impacts.
5. **Visitor (or Traveler) Spending:** Estimates of the dollars travelers spent on their trip, derived from the self-reported expenditures on a national survey of U.S. travelers. The state level data also includes estimates of the spending by international travelers from Canada and overseas markets in the total(s).
6. **Direct Sales:** The term used to portray visitor spending for the major categories of travel-related expenditures and equates to visitor/traveler spending.
7. **Economic Impact:** Analysis that traces the flows of spending associated with travel activity within a specific geographic area to identify changes in sales, tax revenues, income and jobs derived from travelers.
8. **Direct Impact:** The economic impact – including jobs and income – from the initial sales made by travelers. Examples include sales made by travelers at lodging properties, souvenir shops, restaurants, gas stations, amusement parks, museums, etc.

- 9. Indirect Impact:** The economic impact from the production, employment, and income occurring in other businesses/industries that supply the businesses with direct sales to travelers. Examples of include a restaurant's food supplier or a hotel's laundry service.
- 10. Induced Impact:** The economic impact from the spending by households in the local economy as the result of the earnings from a business that directly or indirectly interacts with travelers. Examples include hotel desk clerks who use their wages to pay for their groceries and the accountants who work for companies that supply napkins and other goods to a restaurant frequented by travelers and who use their wages to purchase flowers from the local florist.
- 11. Jobs/Employment:** Estimates of the number of jobs – both full-time and part-time – supported by travel and tourism, reflecting the annual average number of monthly jobs supported by travel and tourism throughout the year and includes wage and salary jobs, sole proprietorships, and individual general partners, but not unpaid family workers or volunteers. Note: The jobs estimates are not on a full-time-equivalent basis.
- 12. Labor Income:** Estimates of Employee Compensation (i.e., wages and benefits) and Proprietor Income including the profits realized by business owners derived from businesses supported by Pennsylvania's travel and tourism industry.
- 13. Transportation:** Estimates of traveler spending on transportation are derived from the self-reported spending of travelers on surveys by Longwoods International. This spending may include purchases of gasoline and airline, bus, or train tickets, as well as costs for parking, tolls, car repairs while traveling, etc.

ECONOMIC IMPACT IN CONTEXT

ECONOMIC IMPACTS IN CONTEXT

Figures in context



Visitor spending

Stacking \$46 billion worth of \$10 bills would reach 312 miles high— similar to the distance from Pittsburgh to Philadelphia.



Total visitor business sales

The \$80 billion in total impact in 2019 is similar in size to what Americans spend on jewelry and watches.



Employment

Tourism supports 521,100 Pennsylvania jobs in 2019—enough to nearly fill Heinz Field for every regular season Steelers game (8 games).



Taxes

To make up for the \$4.8 billion in state and local taxes generated by visitor activity, each household in the state would need to contribute \$950 to maintain the current level of government services.

ABOUT TOURISM ECONOMICS

Tourism Economics is an Oxford Economics company with a singular objective: combine an understanding of the travel sector with proven economic tools to answer the most important questions facing our clients. More than 500 companies, associations, and destination work with Tourism Economics every year as a research partner. We bring decades of experience to every engagement to help our clients make better marketing, investment, and policy decisions. Our team of highly-specialized economists deliver:

- Global travel data-sets with the broadest set of country, city, and state coverage available
- Travel forecasts that are directly linked to the economic and demographic outlook for origins and destinations
- Economic impact analysis that highlights the value of visitors, events, developments, and industry segments
- Policy analysis that informs critical funding, taxation, and travel facilitation decisions
- Market assessments that define market allocation and investment decisions

Tourism Economics operates out of regional headquarters in Philadelphia and Oxford, with offices in Belfast, Buenos Aires, Dubai, Frankfurt, and Ontario.

Oxford Economics is one of the world's foremost independent global advisory firms, providing reports, forecasts and analytical tools on 200 countries, 100 industrial sectors and over 3,000 cities. Our best-of-class global economic and industry models and analytical tools give us an unparalleled ability to forecast external market trends and assess their economic, social and business impact. Headquartered in Oxford, England, with regional centers in London, New York, and Singapore, Oxford Economics has offices across the globe in Belfast, Chicago, Dubai, Miami, Milan, Paris, Philadelphia, San Francisco, and Washington DC, we employ over 250 full-time staff, including 150 professional economists, industry experts and business editors—one of the largest teams of macroeconomists and thought leadership specialists.

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