

ECONOMIC IMPACT OF TRAVEL & TOURISM IN PENNSYLVANIA 2020

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



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INTRODUCTION

If there was ever any doubt about the integral role the travel and tourism industry plays in the Pennsylvania economy, those doubts have been erased by the COVID-19 pandemic. It is clear the industry generates significant economic benefits to Pa's households, businesses, and government in terms of income, jobs, and tax revenues – both on a direct and indirect basis.

While the travel and tourism industry experienced some of the steepest losses in 2020, going forward the industry will continue to be a critical driver of the state's economy, especially in its recovery from the pandemic. The jobs the industry provides will help tens of thousands of Pennsylvanians support themselves and their families, as well as provide a much-needed boost to local communities.

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

By monitoring the travel and tourism industry and its impact on the economy, policymakers can make informed decisions regarding the funding and prioritization of the sector's recovery and future development. By establishing a baseline of economic impacts, the industry can track its progress over time.

The analysis draws on the following data sources:

- Longwoods International survey data, including spending and visitor profile characteristics for visitors to Pennsylvania
- 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
- US Census: 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 travel economy is an engine for economic growth.



Traveler Spending & Visitation

In 2020, an estimated 152 million travelers spent \$29 billion in Pennsylvania.



Traveler activity affected by pandemic

The COVID-19 pandemic had a direct and significant negative impact on travel and tourism in Pennsylvania in 2020, with visitation falling 28% and traveler spending declining by an even larger 37%.



Key employment sector

Even in the pandemic, traveler spending supported one out of every 18 jobs in the state.



Fiscal Contributions

Travelers generated an estimated \$3.6 billion in state and local tax revenues.

The number of travelers and travel-related spending plummeted in 2020 as travel to/within Pennsylvania was severely curtailed due to the COVID-19 pandemic.

Key facts about Pennsylvania's travel industry

The total number of domestic + international travelers fell by an estimated 28% from 2019.

Total traveler spending dropped by an unprecedented 37% in 2020.

Traveler spending supported 5.7% of PA jobs in 2020.

Travel and tourism generated \$3.6 billion in PA state and local taxes in 2020.

Key travel industry impacts in Pennsylvania, 2020

Dollar amounts in billions of nominal dollars

Traveler spending	\$28.900
Total jobs supported by travel industry	412,223
Jobs directly supported by travel industry	251,604
Income supported by travel industry	\$18.874
Taxes generated by travel industry	\$7.650
Federal	\$4.071
State	\$3.579
Local	\$1.810

Source: Tourism Economics

VISITATION AND SPENDING

2020 PENNSYLVANIA TRAVELER OVERVIEW

Pandemic headlines 2020 travel results

The 2020 traveler visitation and spending levels were significantly impacted by the pandemic as capacity limitations and restrictions closed many attractions and businesses for an extended period of time and as travelers sought what they perceived to be safer alternatives in terms of destinations.

Despite these significant challenges, travel did happen in 2020 – it was just substantially different from previous years. Trips were generally closer to home, more likely to be day-trips, and often to outdoor destinations, with travelers concentrating more of their spending on food and shopping than in prior years.

While declines in 2020 were significant, the number of trips and associated spending that occurred in Pennsylvania during the year was still noteworthy.



Visitation fell by nearly 60 million travelers in 2020.

The pandemic shifted a substantial portion of business and overnight trips to leisure and day-trip travel, respectively, though all segments experienced significant declines in visitor volume.



Traveler spending was still noteworthy.

Travelers to and within Pennsylvania spent an estimated \$29 billion at businesses in the state.



Retail activity gained in prominence among travelers.

Travelers leaned towards trips in which shopping was more prevalent, helping minimize retail losses in 2020.

Note: The word “traveler” is used throughout this report as an all inclusive term to denote a trip taken for any reason that includes an overnight stay away from home or a day-trip that is at least 50 miles from home and not part of a person’s usual routine. As such, the term “traveler” is broader than the term “tourist” and includes those visiting an area on a business trip, as well as persons visiting friends and relatives, or visiting an area as “tourists” in the truest sense of the word, i.e., for purely leisure purposes, such as a vacation or getaway weekend – visiting the area’s attractions, or traveling for a myriad of other reasons, e.g., youth sports competitions, special events, etc.

PENNSYLVANIA TRAVEL TRENDS

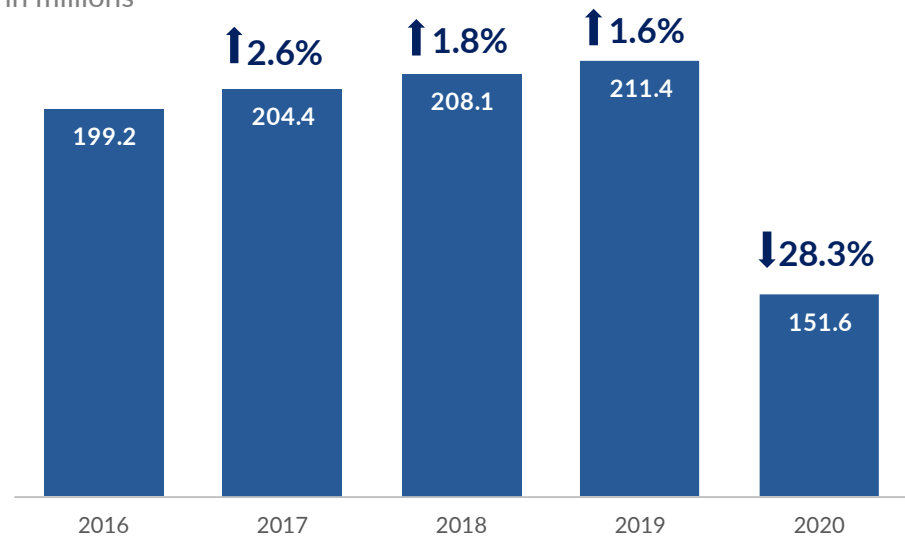
Total travelers, 2016-2020

Pennsylvania hosted an estimated 151.6 million travelers in 2020.

Travel restrictions along with travel hesitancy by consumers due to the pandemic resulted in nearly 60 million fewer person-trips in 2020 compared to 2019's record-setting visitation numbers. The unprecedented 28.3% decline more than erased all the gains in visitation the state had achieved over the previous several years.

The pandemic's effect can be seen in the performance of the state's major travel sectors relative to the pattern seen in prior years. While every sector experienced a substantial decline in the number of travelers, an increased proportion of travelers chose to take a day-trip rather one that included an overnight stay. Similarly, there was a significant upward shift in the proportion of leisure travelers as businesses largely halted all but essential travel in 2020.

Total number of travelers
in millions



Source: Longwoods International, Tourism Economics

PENNSYLVANIA TRAVELER SPENDING TREND

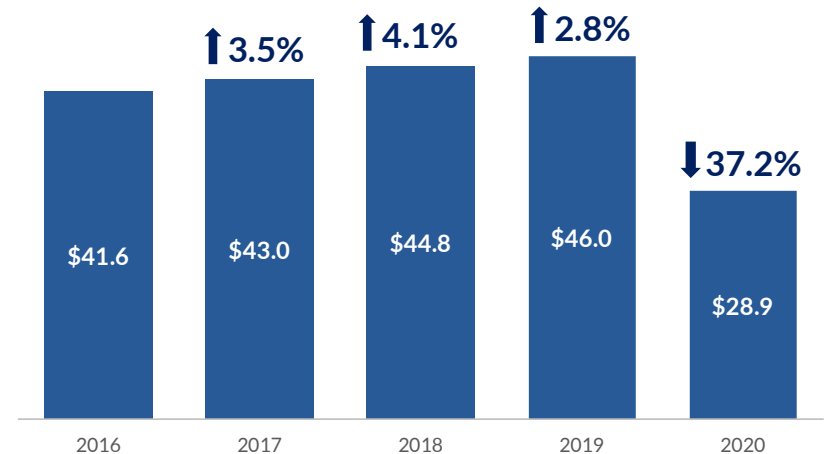
Total traveler spending, 2016-2020

Travelers spent an estimated \$28.9 billion in Pa in 2020. Traveler spending plummeted 37%, or by more than \$17 billion as a direct result of the pandemic.

Traveler spending fell to levels below those seen during the 2009 recession with the pandemic eliminating more than a decade's worth of gains in traveler spending.

Traveler spending declines outpaced visitation declines as a result of: (1) price declines, with both gasoline prices and lodging costs lower in 2020 relative to 2019; (2) the substantial shift to day-trip travel with its far lower per trip expenditure level compared to the overnight segment; (3) the partial or full closure of attractions and most large-scale events, such as concerts, sporting events, and other performances; (4) the large reduction in business travel, especially meetings and conventions that essentially halted in 2020; and (5) the significant reduction in travel from international markets, especially from overseas markets whose travelers typically stay longer and spend more than travelers from the U.S. (domestic) market.

Pennsylvania traveler spending, 2016-2020
in \$billions



Source: Longwoods International, Tourism Economics

VISITATION AND SPENDING BY SEGMENT

Visitor volume and total and per person spending for day-trip and overnight travel, 2016-2020

Overnight travelers outspent their day-trip counterparts by a ratio of 2.9 to 1 on a per person basis in 2020, down from 3.2 to 1 in 2019 as the number of overnight travelers and their spend fell at a greater rate than that of the day-trip segment.

In the years prior to 2020, day-trip travelers accounted for 65% of Pa's total number of travelers but a much lower 36% of total traveler expenditures. While the estimated number of day-trip travelers and the segment's total spend were both down 21% in 2020, the segment's share of travelers grew 6 percentage points and its share of total traveler expenditures was up 10 percentage points due to the pandemic-induced shift away from overnight stays.

Prior to 2020, the overnight travel segment accounted for an estimated 35% of the state's total number of travelers and a much larger 64% of total traveler expenditures.

With a 41% drop in the number of overnight travelers and their total expenditures down by a larger 46%, the segment's share of total travelers fell to 29% and spending to 54% of the state totals.

Traveler volume and spending, 2016-2020

	2016	2017	2018	2019	2020	2019-20 % Change	2019-20 # Change
Travelers (millions)	199.2	204.4	208.1	211.4	151.6	-28%	-59.8
Day-Trip	130.4	132.9	134.3	136.5	107.5	-21%	-29.0
Overnight	68.8	71.4	73.8	74.9	44.1	-41%	-30.8
Travelers - Market Share							
Day-Trip	65%	65%	65%	65%	71%	----	----
Overnight	35%	35%	35%	35%	29%	----	----
Traveler Spending (\$billions)							
Day-Trip	\$15.283	\$15.639	\$16.104	\$16.722	\$13.161	-21%	-\$3.561
Overnight	\$26.298	\$27.405	\$28.684	\$29.319	\$15.739	-46%	-\$13.580
Traveler Spend Market Share							
Day-Trip	37%	36%	36%	36%	46%	----	----
Overnight	63%	64%	64%	64%	54%	----	----
Per Traveler Per Trip Spend							
Day-Trip	\$117	\$118	\$120	\$123	\$122	-1%	-\$1
Overnight	\$382	\$384	\$389	\$391	\$357	-9%	-\$34

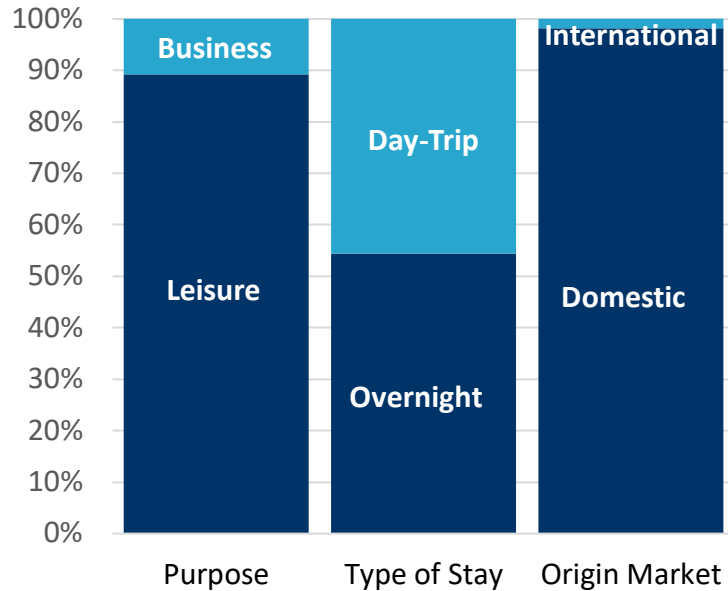
Source: Longwoods International, Tourism Economics

TRAVELER SPENDING BY PURPOSE, TYPE OF STAY, AND MARKET

Traveler spending by purpose, type of stay, and market, 2019-2020

Spending share by market, 2020

Percent of total expenditures per market



Source: Tourism Economics

Pennsylvania traveler spending (in \$billions)

in \$billions and as percent of total

	Traveler Spending		2019-20 % Change	Market Share	
	2019	2020		2019	2020
Purpose	\$46.041	\$28.900	-37.2%		
Leisure	\$38.695	\$25.725	-33.5%	84%	89%
Business	\$7.346	\$3.175	-56.8%	16%	11%
Type of Stay	\$46.041	\$28.900	-37.2%		
Day-Trip	\$16.722	\$13.161	-21.3%	36%	46%
Overnight	\$29.319	\$15.739	-46.3%	64%	54%
Origin Market	\$46.041	\$28.900	-37.2%		
Domestic	\$43.168	\$28.382	-34.3%	94%	98%
International	\$2.873	\$0.518	-82.0%	6%	2%

Source: Tourism Economics

SPENDING BY TRAVEL SEGMENT

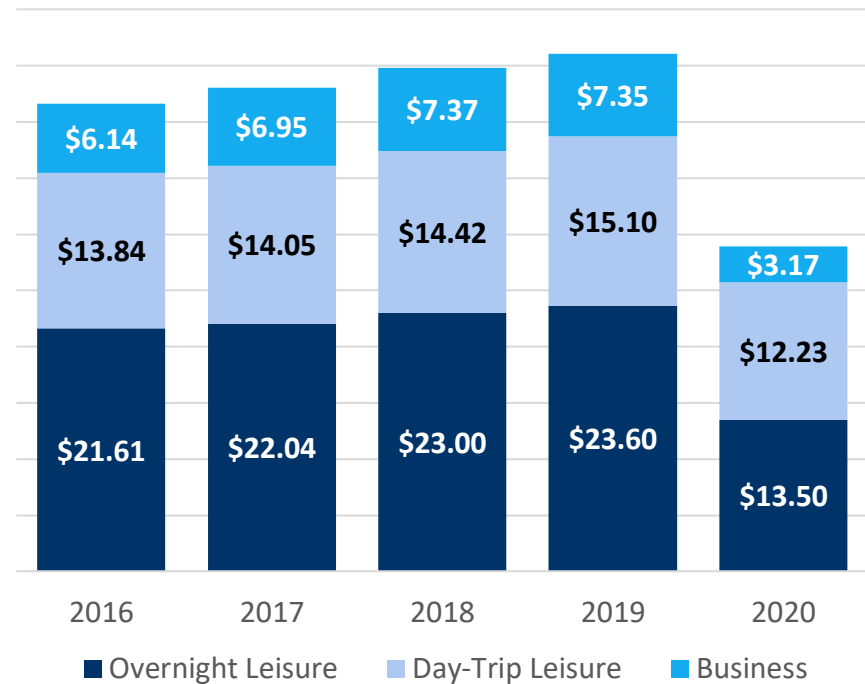
Spending by travel segment, 2016-2020

Spending by each travel segment was generally on a steady upward trajectory in recent years until 2020 when the pandemic severely curtailed traveler spending.

In a typical year, the total expenditures of business travelers is roughly equal to 50% of the day-trip leisure spend. However, the total spending level of business travelers in 2020 relative to the day-trip leisure segment fell to 25% -- showing the devastating impact the pandemic had on business travel and Pa's travel economy.

The day-trip leisure segment was the one, somewhat bright spot in terms of traveler spending in 2020 with a far smaller drop in the total expenditure level compared to the overnight leisure and business travel segments.

Pennsylvania traveler spending by travel segment, 2016 - 2020
in \$billions



Source: Longwoods International, Tourism Economics

SPENDING BY SEGMENT AND TRAVEL TYPE

Spending by travel segment and travel type, 2019-2020

The drop in spending by Pa's business travel segment was far larger in percentage terms than that of either the leisure day-trip and overnight travel segments in 2020.

The day-trip leisure segment had by far the smallest decline in traveler spending in both percentage and dollar terms compared to the overnight leisure and business travel segments in 2020. Spending by overnight travelers was down by nearly \$14 billion in 2020, or more than 46%, compared to the segment's 2019 spending level.

In a typical year, business travel's share of the state's total traveler expenditures is far higher than the segment's share of total visitation. However, both plummeted in 2020 with spending down 57%. The segment's share of total traveler expenditures fell 5 percentage points to 11% vs. the 16% share of prior years.

Pennsylvania traveler spending by segment & travel type, 2019-2020

Dollar amounts in \$billions

Segment/Stay	Leisure	Business	TOTAL
2020			
Day-Trip	\$12.0	\$1.2	\$13.2
Overnight	\$13.7	\$2.0	\$15.7
TOTAL	\$25.7	\$3.2	\$28.9
2019			
Day-Trip	\$15.1	\$1.6	\$16.7
Overnight	\$23.6	\$5.7	\$29.3
TOTAL	\$38.7	\$7.3	\$46.0
Percent Change			
Day-Trip	-20.6%	-27.2%	-21.2%
Overnight	-41.8%	-65.1%	-46.3%
TOTAL	-33.5%	-56.8%	-37.2%

Source: Longwoods International, Tourism Economics

TRAVELER SPENDING BY CATEGORY

Traveler spending by category, 2020

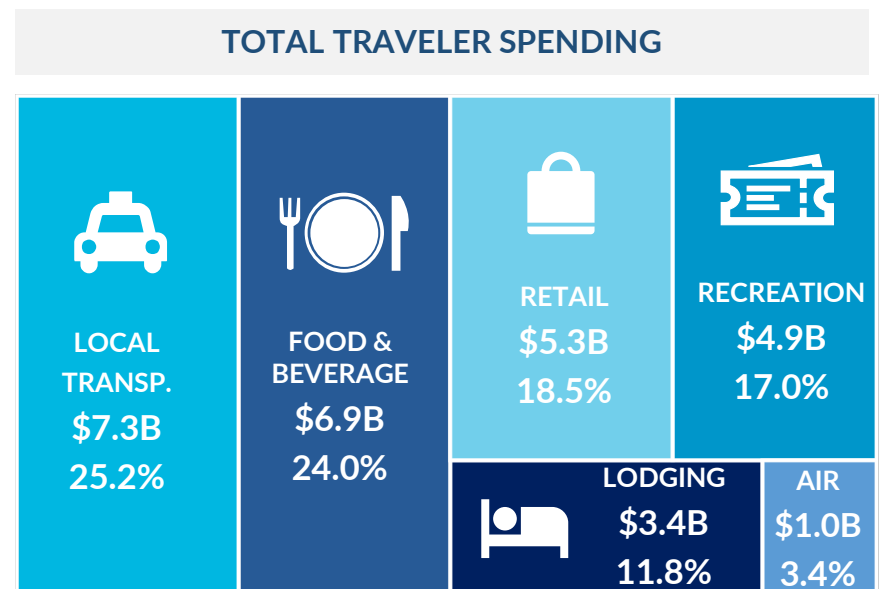
Traveler spending shifted away from lodging and air transportation in 2020 and more towards retail and food & beverage purchases.

While every category of traveler spending experienced a substantial drop in 2020 in dollar terms, the share of traveler dollars allocated for retail and food & beverage purchases at restaurants, bars, and grocery stores increased.

With an increased share of travelers opting for day-trips vs. overnight stays in 2020, it is not surprising the share of traveler dollars allocated for lodging fell in 2020 despite an increase in short-term rentals through Airbnb, Vrbo, etc.

The share of traveler dollars going to air transportation saw the largest decline in 2020 as many domestic travelers opted to drive rather than fly and flights from overseas markets were essentially non-existent.

Travelers allocated a slightly smaller share of their trip dollars to recreation compared to 2019.



Source: Longwoods International, Tourism Economics

TRAVELER SPENDING BY CATEGORY

Traveler spending by category, 2016-2020







The air transportation and lodging sectors suffered the largest declines in traveler spending in 2020.

While all spending categories suffered declines in 2020, the size of the decline was affected by changes in the types of travel that did happen. With the large decline in business travel compared to leisure travel and the shift to day-trips vs. overnight stays, air transportation and lodging experienced the largest percentage declines with the food & beverages and retail sectors experiencing the smallest declines in percentage terms.

While recreational spending is primarily linked to leisure travel, closures and capacity limitations in areas such as sporting events, museums, and concerts and a clear preference for no- and low-cost outdoor recreational activities, e.g., hiking and scenic drives, resulted in this category experiencing the second largest decline in dollar terms behind ground transportation in 2020.

Traveler Spending in Pennsylvania by category, 2016-2020

dollar amounts in \$millions

SPENDING CATEGORY	2016	2017	2018	2019	2020	2019-20 % Change	2016-20 CAGR
TOTAL	41,581	43,044	44,788	46,041	28,900	-37.2%	-8.7%
 Lodging	5,737	5,948	6,281	6,445	3,416	-47.0%	-12.2%
 Food & Beverage	8,622	8,999	9,514	9,860	6,931	-29.7%	-5.3%
 Retail	6,587	6,745	6,888	7,042	5,343	-24.1%	-5.1%
 Recreation	7,194	7,542	7,689	8,050	4,921	-38.9%	-9.1%
 Ground Transportation	10,142	10,342	10,850	10,928	7,295	-33.2%	-7.9%
 Air Transportation	3,299	3,467	3,565	3,715	994	-73.3%	-25.9%

Lodging includes spending at second homes.

Source: Longwoods International, Tourism Economics

TRAVELER SPENDING BY CATEGORY

Traveler spending by category, 2016-2020

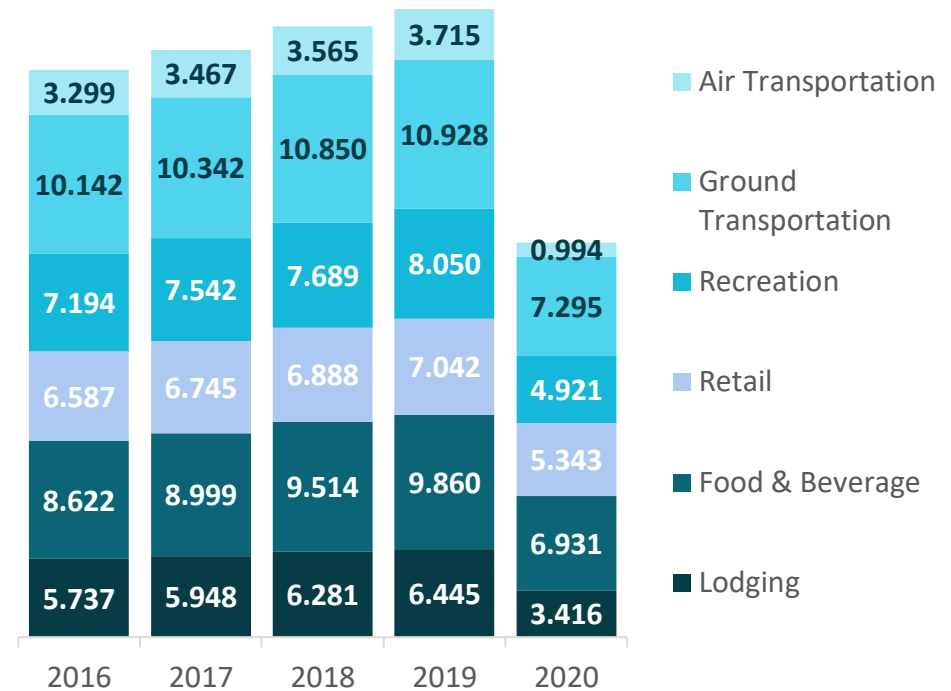
Changes in traveler behavior as well as external forces such as capacity limits and outright closures affected travelers' spending patterns compared to prior years.

Travelers spent nearly \$7 billion on food & beverages in 2020. This was a decline of \$2.9 billion from the prior year – the third lowest of the major spending categories in dollar terms, while the segment's decline in percentage terms (-30%) was the second smallest of the main traveler spending categories behind retail purchases.

Spending by travelers on retail purchases totaled \$5.3 billion in 2020 – a decline of \$1.7 billion or 24% from 2019 – the smallest decline in both dollar and percentage terms among the main spending categories as travelers splurged a bit on goods as the pandemic wore on.

Air transportation by far suffered the greatest loss among the major spending categories with flights from overseas markets practically non-existent and domestic travelers opting to drive to their travel destinations whenever possible. The result was a nearly 75% drop in spending on air transportation in 2020, i.e., a \$2.7 billion decline from 2019's record high.

Pennsylvania traveler spending by category, 2016-2020
in \$billions



Source: Longwoods International, Tourism Economics

TRAVELER SPENDING BY CATEGORY SHARE

Traveler spending by category share, 2016-2020

When the categories of traveler spending are viewed as a share of the annual total in a time series, the shifts that occurred in 2020 are readily apparent.

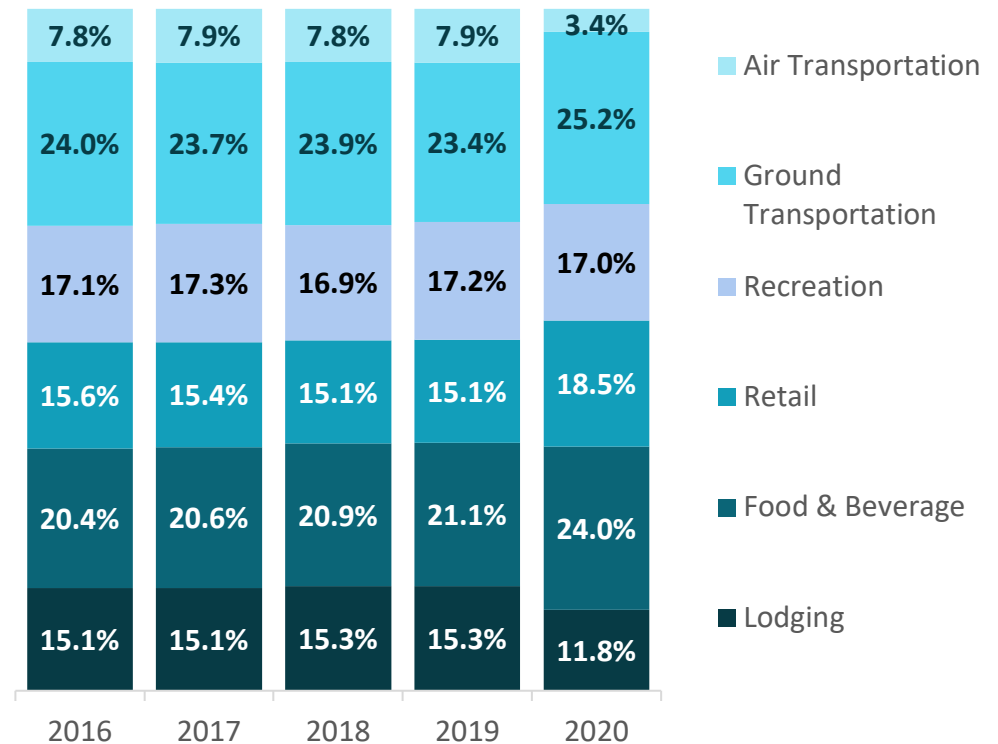
The changes in traveler behavior caused by the pandemic resulted in significant changes in the spending shares by category. In 2020, traveler spending on lodging accounted for 11.8% of total traveler spending in Pennsylvania compared to 15.3% in 2019, a significant decrease of 3.5 percentage points.

Air transportation suffered the most with its share of total traveler dollars in 2020 more than halved relative to the immediately prior years.

In contrast, the share of total traveler spending on food & beverages jumped 3 percentage points to 24% - the category's highest share in recent years.

There was also a more than 3 percentage point upward shift in the share of traveler spending on retail goods in 2020 vs. 2019.

Pennsylvania traveler spending by category, 2016-2020
(percent of annual total)



Source: Longwoods International, Tourism Economics

TOURISM SATELLITE ACCOUNT

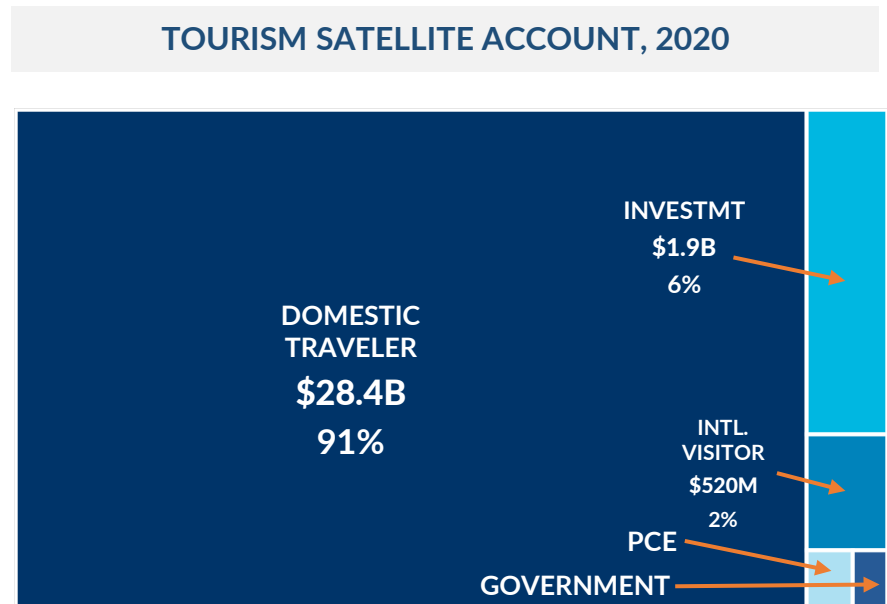
TOURISM SATELLITE ACCOUNT

Tourism Satellite Account Measures, 2020

The Tourism Satellite Account (TSA) is an economic model that takes into account a broader range of travel and tourism-related expenditures beyond visitor spending, i.e., capital investments by the travel industry, government spending in support of travel and tourism, and personal consumption expenditures (PCE).

The direct contributions of travel- and tourism-related activities to the Pennsylvania economy was \$31.1 billion in 2020, a nearly 37% decline from 2019's record-setting \$49.0 billion.

Despite the 34% decline in spending by domestic travelers in 2020, as in prior years this segment accounted for the vast majority (91%) of the TSA total, an increase from 88% in 2019 as most other segments – most notably the spending contributions from international travelers – experienced greater losses in percentage terms.



Source: Tourism Economics

Non-visitor private consumption expenditures (PCE) represent travel-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 tourism.

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

TOURISM SATELLITE ACCOUNT

Tourism Satellite Account Measures, 2016-2020

In the years prior to 2020 all but international traveler spending of the TSA components showed consistent growth during the 2016- 2019 period.

Spending by domestic travelers comprised the major component of the state’s TSA and had the strongest growth in dollar terms during the 2016-2019 period, while government spending in support of the travel industry, capital investments, and non-visitor personal consumption expenditures (PCE) had higher rates of growth.

In the years prior to 2020, international traveler spending had started to slow. This TSA segment plummeted by well over \$2.3 billion in 2020, or by 82% to \$518 million.

With visitor volume showing a steady increase in the years prior to 2020, government stepped up its contributions to the industry as tax revenues increased and in recognition of the industry’s value to the state and local economy, but support was slashed in 2020 as overall tax revenues fell.

Tourism Satellite Account Measures, 2016-2020

Dollar amounts in \$millions

Tourism Satellite Account Measures	2016	2017	2018	2019	2020	2019-20 % Change	2016-20 CAGR
TOTAL	\$43,640	\$45,710	\$47,704	\$48,971	\$31,119	-36.5%	-8.1%
Domestic Travel Spend	\$38,783	\$40,164	\$41,912	\$43,168	28,382	-34.3%	--7.5%
International Spend	2,798	2,880	2,876	2,873	518	-82.0%	-34.4%
Non-Visitor PCE	257	273	285	297	193	-34.8%	-6.9%
Government Support	212	233	254	267	147	-45.1%	-8.8%
Capital Investments	1,589	2,161	2,376	2,366	1,879	-20.6%	4.3%

Source: Tourism Economics

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TOURISM SATELLITE ACCOUNT

Capital investments by travel-related businesses, 2016-2020

Capital investments in the form of construction projects and new machinery and equipment contributed an average of \$2.1 billion annually for the years 2016-2020.

With most large construction projects planned years ahead, new construction spending did not decline to the same extent as visitor spending in 2020. Construction spending was down 7.7% (i.e., by less than \$100 million) vs. the 34% drop in domestic traveler spending in 2020. Notably, the nearly \$1.2 billion spent on new construction projects in 2020 was substantially higher than the level of construction expenditures in 2016 and 2017.

Spending on machinery and equipment, which typically has a shorter planning horizon than construction projects, declined 36% in 2020 to \$697 million – the smallest amount in several years.

Travel-related capital investments, 2016-2020

in \$millions

TSA: Capital Investments	2016	2017	2018	2019	2020	2019-20 % Change	2016-20 CAGR
TOTAL	\$1,589	\$2,161	\$2,376	\$2,366	\$1,879	-20.6%	4.3%
Construction	\$606	\$1,145	\$1,318	\$1,279	\$1,181	-7.7%	18.2%
Machinery & Equipment	\$983	\$1,016	\$1,058	\$1,086	\$697	-35.8%	-8.2%

Source: Dodge Construction; Tourism Economics

DOMESTIC TRAVEL MARKET

ANALYSIS OF PA'S 2020 DOMESTIC TRAVEL MARKET

Consumer survey information available for domestic travelers allows for a deeper analysis of the state's domestic travel market – a market that includes both residents and non-residents of Pennsylvania from throughout the U.S. The following analysis includes the size of certain domestic sectors along with the distribution of traveler spending. It is important to note that the information in this section will, by definition, differ from the data and information presented in other sections of this report. The information presented here is limited to domestic travelers that have identified a Pennsylvania destination on their trip. The data excludes spending by international travelers and certain spending attributable to Pennsylvania and detailed in other sections of this report, but not captured in the consumer survey. As such, the totals presented in this section for domestic travelers differs slightly from those presented in the other sections, but nevertheless provide valuable insight into the spending behaviors of the state's U.S. visitors.

Pennsylvania welcomed an estimated 151 million travelers from domestic markets in 2020 whose expenditures totaled an estimated \$27.5 billion – a \$15.5 billion decline from 2019.

Leisure day-trips were the primary purpose of travel for nearly 100 million travelers to and within Pennsylvania – a more than 25 million decrease from 2019. Despite the drop in the number of travelers, the day-trip leisure share rose from 60% in the prior year to 65% in 2020 as the segment's visitation losses were not as severe as for the other travel segments. People still wanted to travel despite the pandemic and viewed leisure day-trips as a relatively safe option, especially to outdoor locales. With so many unknowns regarding the COVID-19 virus in 2020, overnight travel was viewed as a far riskier option by many travelers whether for a leisure or business trip.

DOMESTIC TRAVELER SEGMENTS

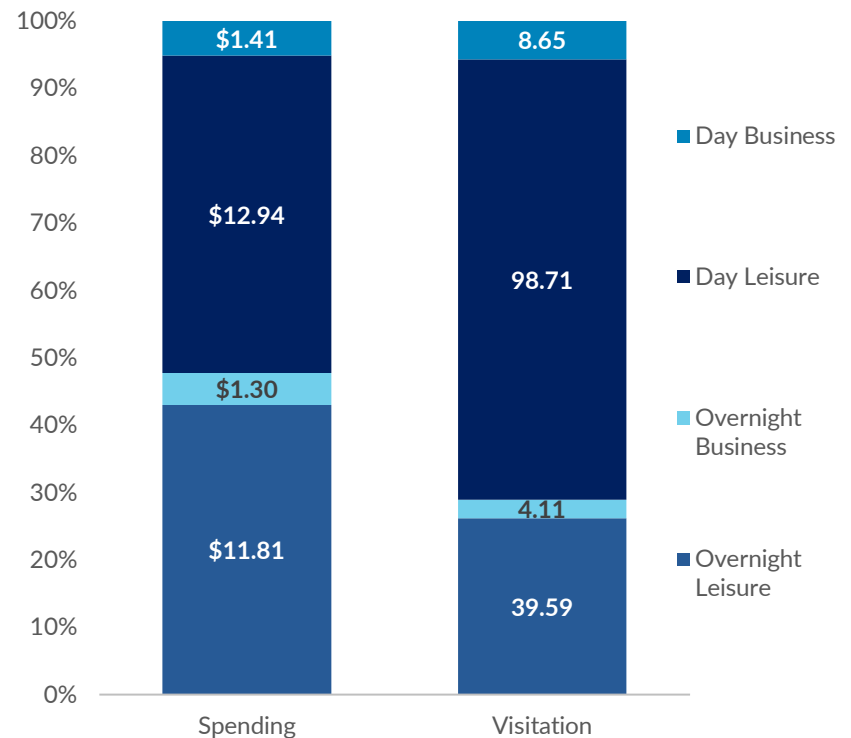
Comparison of traveler spending and visitation by travel segment, 2020

Business and leisure travelers on overnight trips account for a far higher share of total visitor spending than their share of the total number of travelers.

Day-trip leisure visitors were not only the largest visitation segment in 2020, they were also the largest spending segment, surpassing the overnight leisure segment whose spending in prior years typically exceeded that of the day-trip leisure segment. Day-trip leisure travelers spent nearly \$13 billion in Pennsylvania in 2020, representing 47% of the total domestic visitor spending.

Overnight leisure travelers spent \$11.8 billion on their Pennsylvania trips in 2020. Despite this segment comprising just over a fourth of all travelers, their spending accounted for 43% of total domestic traveler expenditures in 2020.

Pennsylvania domestic traveler spending vs. visitation
(Spending in \$billions, visitation in millions of travelers)



DOMESTIC TRAVELER SPENDING BY SEGMENT

Domestic Traveler Spending by Segment, 2016-2020

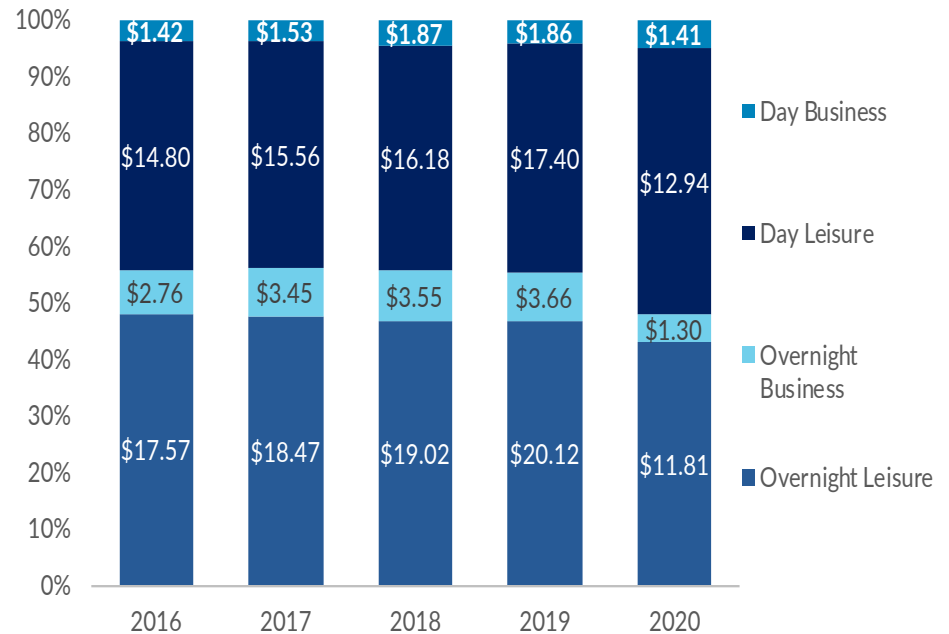
With a large shift to day-trip travel in 2020, day-trip business and leisure travelers increased their respective shares of total domestic traveler spending relative to prior years and despite the drop in traveler spending.

Domestic travelers spent \$27.5 billion in Pennsylvania in 2020 – a \$15.5 billion, or 36%, drop from 2019. The total spending level of overnight leisure travelers was down by \$8.3 billion, or 41%, from 2019, accounting for more than half of the loss of domestic traveler spending in 2020.

Spending by domestic overnight business travelers was even steeper in percentage terms, plummeting 64% to \$1.3 billion in 2020. When the pandemic hit, the vast majority of overnight business travel came to a halt resulting in the segment’s \$2.4 billion loss for 2020.

The pandemic-induced shift to day-trip travel is important to note. While the overall spending level of day-trip leisure and business travelers was down in 2020, each by roughly 25%, the segment’s losses were far smaller than their overnight counterparts. As a result, the day-trip leisure and business travel segments both increased their respective shares of Pa’s domestic travel spending in 2020.

Pennsylvania domestic traveler spending, 2016-2020
in \$ billions



Source: Tourism Economics

DOMESTIC OVERNIGHT LEISURE TRAVEL SEGMENT

Domestic overnight leisure traveler spending by category, 2020

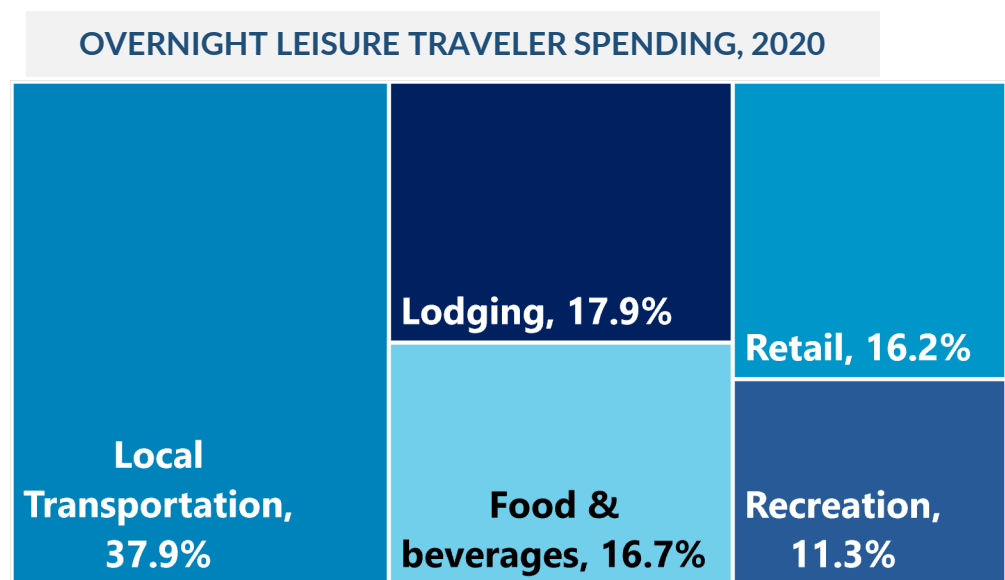
Domestic overnight leisure travelers spent a far larger proportion of their trip dollars on transportation costs compared to 2019, with the relative shares of all other spending categories falling in 2020.

Pennsylvania hosted an estimated 39.6 million overnight leisure travelers (as measured in person-trips) in 2020.

These travelers spent an estimated \$11.8 billion in Pennsylvania in 2020, down from \$20.1 billion in 2019.

Travelers spent an average of \$298 on each trip with their per-trip spending declining by \$19 from 2019.

The share of total domestic overnight leisure traveler spending allocated to lodging dropped to 17.9% in 2020, compared to nearly 20% in 2019. The decline was partly due to price cuts by the lodging sector in an attempt to fill rooms and properties, as well as the steep drop in the overall number of overnight travelers.



Source: Longwoods International, Tourism Economics

DOMESTIC OVERNIGHT BUSINESS TRAVEL SEGMENT

Domestic overnight business traveler spending by category, 2020

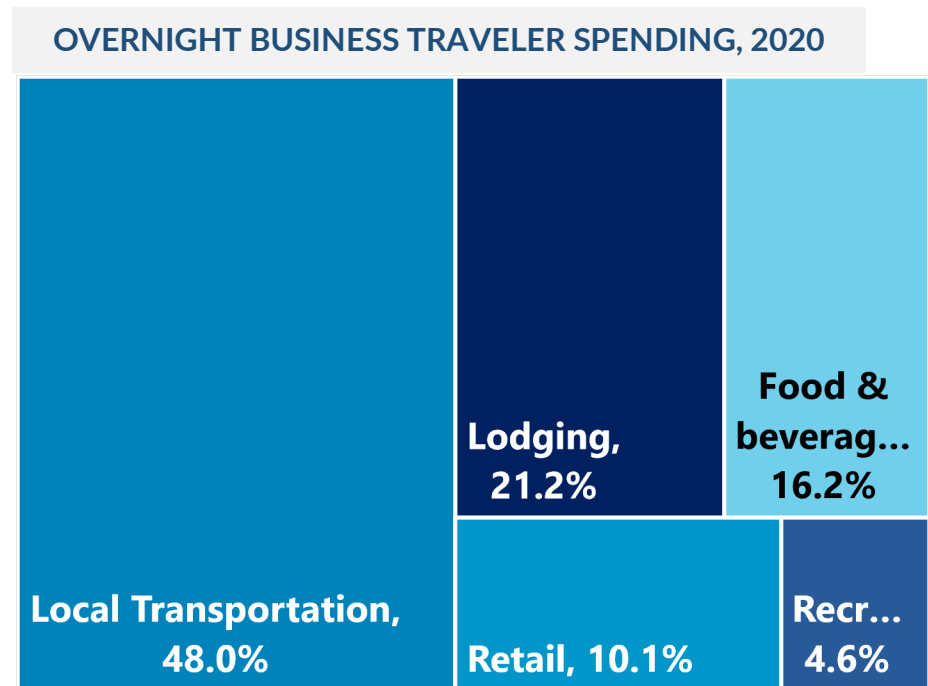
Similar to domestic overnight leisure travelers, the business overnight segment spent a far larger share of their trip dollars in 2020 on transportation costs compared to 2019. Unlike the leisure segment, the business segment actually increased its share of trip dollars spent on food & beverage and retail purchases in 2020.

Pennsylvania hosted an estimated 4.1 million overnight business travelers (as measured in person-trips) in 2020.

These travelers spent an estimated \$1.3 billion in 2020, a decline of 65%.

Each business overnight traveler spent an average of \$317 per person per trip in 2020 - a substantial decrease from 2019's nearly \$500 per person spend, with business travel largely curtailed due to the pandemic.

The overnight business segment experienced the largest visitation and spending declines of all domestic segments in 2020 with per traveler spending dropping by roughly a third.



Source: Longwoods International, Tourism Economics

DOMESTIC DAY-TRIP LEISURE SEGMENT

Domestic day-trip leisure traveler spending by category, 2020

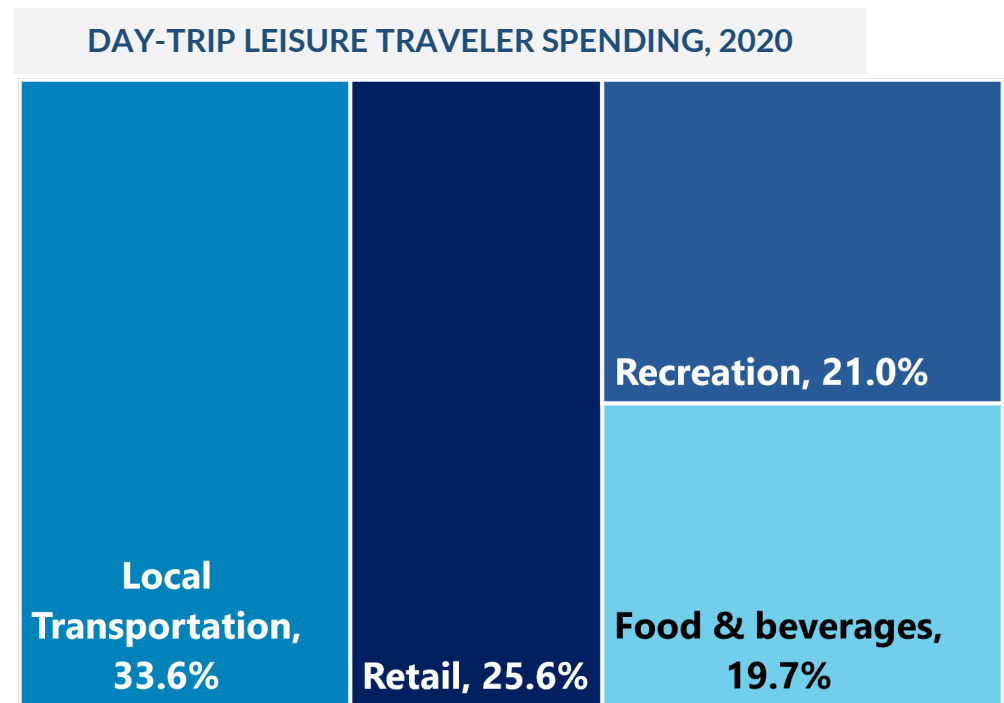
There was little change in the 2020 spending pattern of domestic day-trip leisure travelers for the food & beverage and retail spending categories relative to 2019.

Pennsylvania hosted an estimated 98.7 million day-trip leisure travelers (as measured in person-trips) in 2020 with spending totaling an estimated \$12.9 billion.

The share of day-trip leisure traveler spending allocated to retail purchases rose one percentage point to 25.6% in 2020 and was the segment's 2nd largest spending category behind transportation.

The share of the day-trip leisure dollar spent on recreational activities dropped 4 percentage points from 2019 to 21.0% as an increased number of travelers opted for low- to no-cost outdoor recreational activities in place of indoor attractions that often had capacity limitations or were closed in 2020.

Domestic day-trip leisure travelers spent an average of \$131 per person per trip in 2020 – a relatively small decline from 2019's average per person spend of \$139.



Source: Longwoods International, Tourism Economics

DOMESTIC TRAVELER SPENDING

Domestic traveler spending by segment and spending category, 2020

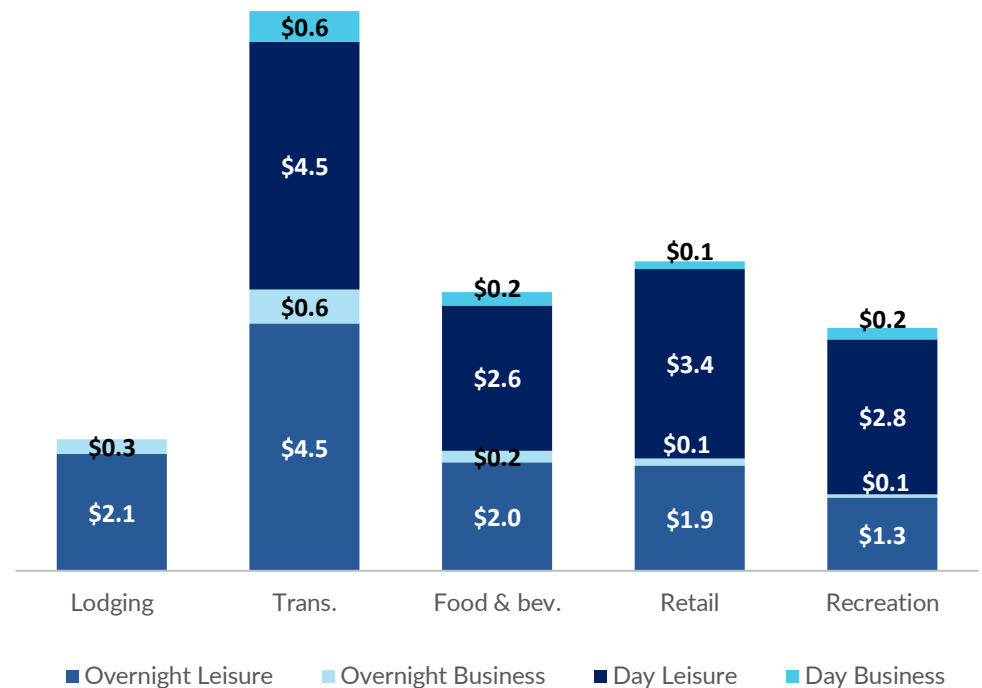
With business travel largely curtailed in 2020 and the sharp decline in overnight leisure travelers, the domestic day-trip leisure segment increased its share of total domestic traveler spending in 2020, especially for food & beverage and retail purchases.

The overall leisure share of domestic traveler spending increased to 90% in 2020 – a 3 percentage point increase compared to 2019.

The overnight leisure share of domestic traveler spending on lodging surged over 8 percentage points to 86% in 2020 as all but essential business travel was halted, especially large group meetings and conventions that in prior years typically included an overnight stay.

The share of total food & beverage purchases by domestic day-trip travelers grew by nearly 9 percentage points to 56% in 2020, while the segment’s share of total retail purchases grew to 63%.

Pennsylvania traveler spending by segment & spend category, 2020
in \$billions



TRAVEL INDUSTRY IMPACTS

TRAVEL AND TOURISM INDUSTRY IMPACTS

Direct impact of travel and tourism industry on employment and GDP, 2020

The travel and tourism industry has a direct impact on the PA's gross domestic product (GDP) and employment derived from travelers' spending in the state.

The travel and tourism contributed more than \$14 billion to the state's GDP in 2020, i.e., the "value added" of those sectors directly interacting with the traveling public. As such, the travel and tourism **industry** impact includes only the direct value of the goods and services purchased by travelers and, as such, excludes the capital investment and government support of travel and tourism included in the Tourism Satellite Account presented in a previous section.

Since GDP is a measure that includes only the value of goods and services purchased by travelers that are produced locally, GDP will always be lower than the amount of traveler spending. The cost of imported goods (e.g., gasoline, food, retail goods, etc.) that come from out-of-state are excluded from the GDP calculation, as are the business profits from companies headquartered out of state.

Traveler spending was directly responsible for an employment figure of 251,600, or 3.5% of total PA employment in 2020.

Travel and tourism industry (direct) impact on GDP & employment
Employment in number of jobs; GDP in \$millions of nominal dollars

Direct Impacts of Travel and Tourism, 2020	Employment	GDP (in \$millions)
TOTAL	251,604	\$14,030
Food & Beverage	91,418	\$3,688
Lodging	41,722	2,565
Recreation & Entertainment	36,413	1,927
Retail Trade	27,971	1,615
Ground Transportation	27,932	1,462
Air Transportation	6,871	796
Personal Services	6,650	360
Gasoline Stations	6,476	289
Finance, Insurance, Real Estate	4,983	1,236
Business Services	1,168	93

Source: Tourism Economics

TRAVEL & TOURISM INDUSTRY EMPLOYMENT IMPACT

Travel and tourism industry impact on employment, 2016-2020

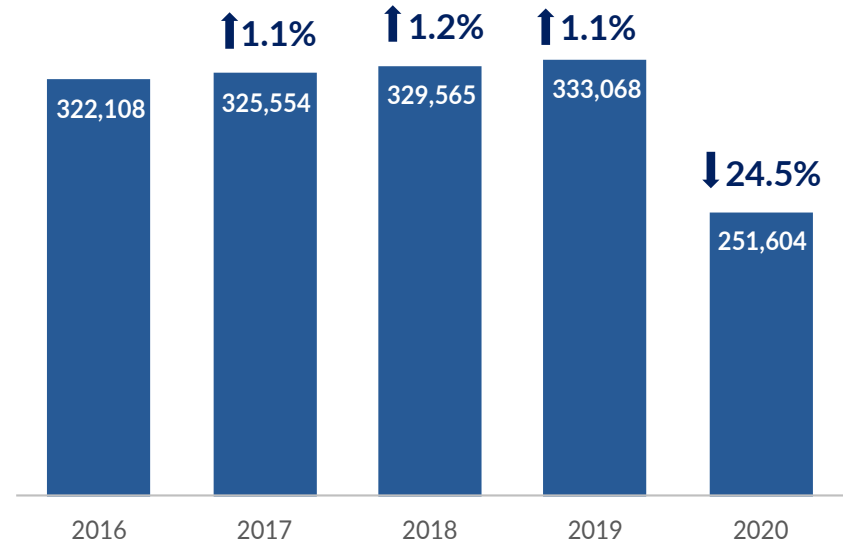
The pandemic had a significant negative impact on employment in travel- and tourism-related businesses with the number of jobs supported by traveler spending dropping by almost 25% in 2020.

With the steady increase in the number of travelers and traveler spending in the years immediately prior to 2020, the number of persons employed in travel- and tourism-related businesses showed steady year-over-year gains totaling close to 11,000 between 2016 and 2019.

Mandatory closures and/or capacity limitations, a general unwillingness on the part of consumers to travel and/or to visit indoor locales when they did travel took a major toll on employment in travel- and tourism-related businesses, resulting in a nearly 25% drop in travel-related employment in 2020, or an employment loss totaling close to 81,500.

The food & beverage, lodging and recreation & entertainment sectors experienced the largest declines in travel-related employment in terms of the number employed – together accounting for 83% of the sector’s total loss of employment in 2020, while the air transportation, lodging, and recreation & entertainment sectors experienced the largest declines on a percentage basis.

Travel- and tourism-supported employment in Pennsylvania
number of jobs and year-over-year percent change



Source: Tourism Economics

TRAVEL AND TOURISM INDUSTRY EMPLOYMENT IMPACT

Travel and tourism industry employment intensity for select industries, 2020

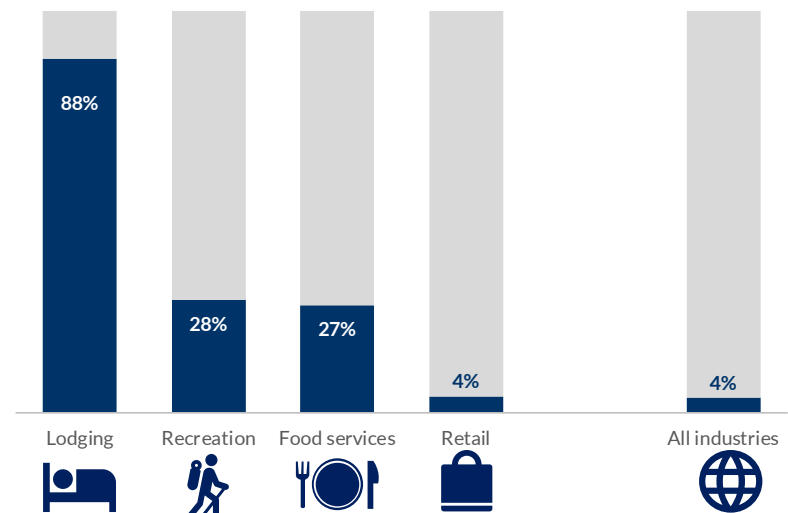
Traveler spending supports employment in a wide variety of industries, but especially in the lodging, recreation, and food services sectors, and retail to a lesser extent .

While the lodging sector had the highest employment intensity with almost 90% of lodging employment directly attributed to traveler spending in 2020, traveler spending also supported more than 25% of the jobs in the recreation and food services sectors, and 4% of retail jobs in 2020.

Traveler spending supported 3.5% of total employment in all industries in 2020, down from 4.2% in 2019.

Travel-supported employment accounted for 1 out of every 18 Pa jobs in 2020 – down from 1 out of every 24 jobs in 2019, as the state’s leisure and hospitality industry experienced some of the steepest employment losses as a result of the pandemic.

Travel and tourism industry employment intensity, 2020
Amounts reflect share of total industry employment



TRAVEL AND TOURISM INDUSTRY EMPLOYMENT RANK

Travel and tourism industry employment ranking, 2020

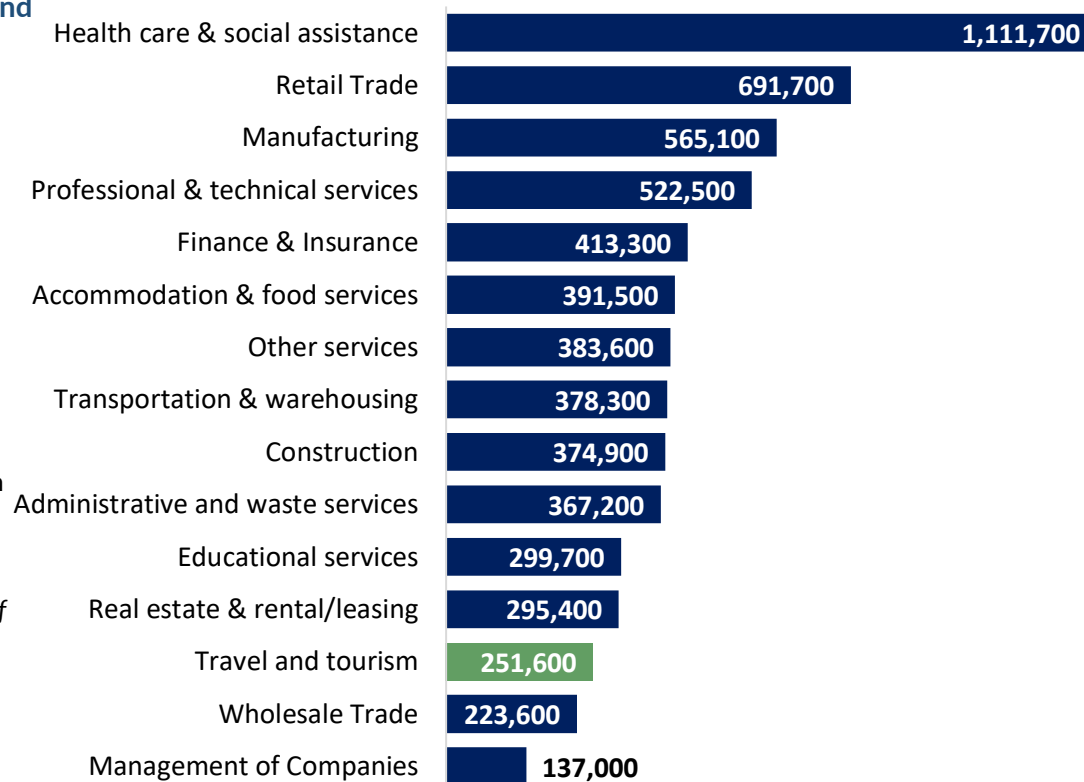
The travel and tourism industry dropped to 13th in terms of employment relative to other major sectors of the state's economy, down from 11th in 2019 and 10th in 2017.

Traveler spending directly supported 251,600 jobs in Pennsylvania in 2020. Comparing this with direct employment in other industry sectors, the travel and tourism industry ranked as the state's 13th largest industry.

The travel and tourism industry ranked 11th in employment in 2019 but was surpassed by the educational services and real estate & rental/leasing industries in 2020 whose employment losses were far lower than those experienced by the travel and tourism industry.

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

Employment in Pennsylvania by major industry, 2020



Source: Tourism Economics, BEA

TRAVEL ECONOMY IMPACTS



ECONOMIC IMPACTS

How traveler spending generates employment and income

The analysis of the travel and tourism industry's impact on Pennsylvania begins with actual spending by travelers, but also considers the downstream effects of this injection of dollars into the local economy. To determine the total economic impact of travel and tourism in Pennsylvania, estimated traveler spending was input into a model of the state's economy created in the economic analysis software program, IMPLAN, to calculate three distinct types of impact: direct, indirect, and induced.

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

1. **Direct Impacts:** Travelers 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 sector directly impacted by travel and tourism also purchases goods and services as inputs for their production activities (e.g., food wholesalers, utilities). 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 travelers, spend those wages in the local economy.

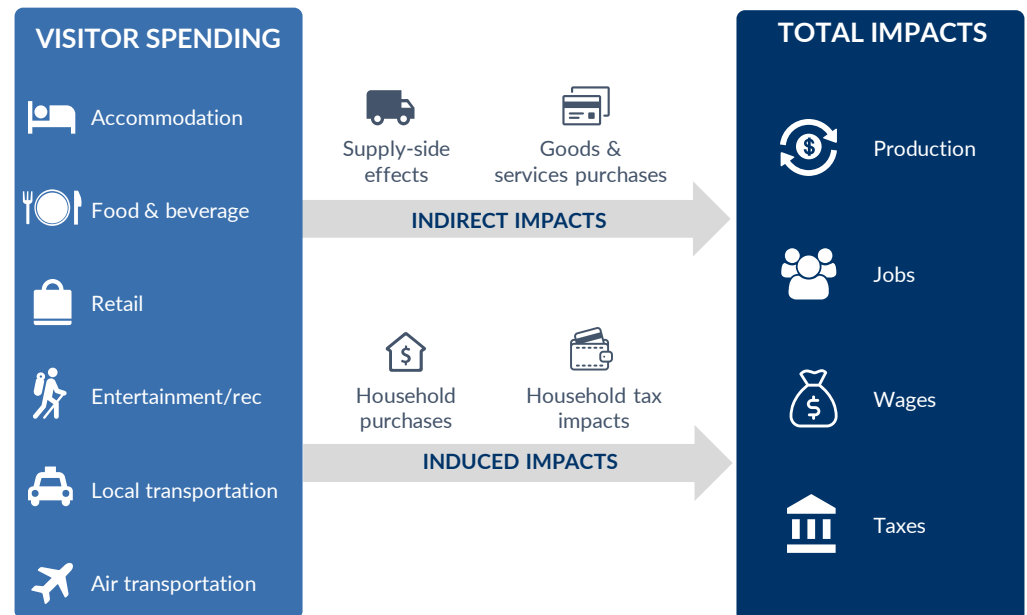
TRAVEL ECONOMY IMPACT

How traveler spending generates direct, indirect, and induced employment and income

Economic impact flowchart

The IMPLAN model is used to calculate the three levels of the travel economy impact – direct, indirect, and induced – for a broad set of indicators including the following:

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



TRAVEL ECONOMY IMPACT ON PA BUSINESS SALES

Travel economy impact on Pa business sales by industry, 2020

Pennsylvania businesses purchase billions of dollars worth of goods and services each year in support of travelers, with billions in additional sales derived from indirect and induced purchases.

Pennsylvania businesses spent \$31.1 billion in direct support of travelers in 2020. When the indirect and induced sales impacts are included, the total rises to \$55.3 billion.

While substantial, direct sales were down 36%, or by \$17.9 billion, in 2020 with total sales from all impacts down \$24.4 billion, or 31%, from 2019.

The recreation & entertainment, gas stations, retail, lodging, and air transportation industries together accounted for two-thirds of the dollar loss in total sales, with air transportation, lodging, non-air transportation, and recreation & entertainment experiencing the largest declines on a percentage basis.

Travel economy impact on Pa business sales (in \$ billions), 2020



Travel economy impacts on business sales by industry, 2020

In \$millions

Business Sales derived from Travel and Tourism	Direct Sales	Indirect Sales	Induced Sales	Total Sales
TOTAL	\$31,119	\$11,242	\$12,914	\$55,276
Finance, Insurance, Real Estate	\$2,069	\$2,706	\$3,833	\$8,608
Food & Beverage	6,931	240	792	7,964
Retail Trade	5,438	200	823	6,461
Recreation and Entertainment	4,478	242	205	4,925
Gasoline Stations	4,192	17	45	4,254
Business Services	148	2,751	1,187	4,085
Ground Transportation	1,707	1,025	346	3,078
Construction & Utilities	1,879	773	420	3,072
Lodging	2,681	7	9	2,697
Education & Health Care	---	33	2,664	2,697
Manufacturing	99	992	485	1,575
Communications	---	898	677	1,574
Personal Services	295	319	638	1,253
Air Transportation	994	44	55	1,093
Wholesale Trade	---	510	493	1,002
Government	209	292	174	675
Agriculture, Fishing, Mining	---	193	69	262

Source: IMPLAN, Tourism Economics

TRAVEL ECONOMY IMPACT ON BUSINESS SALES

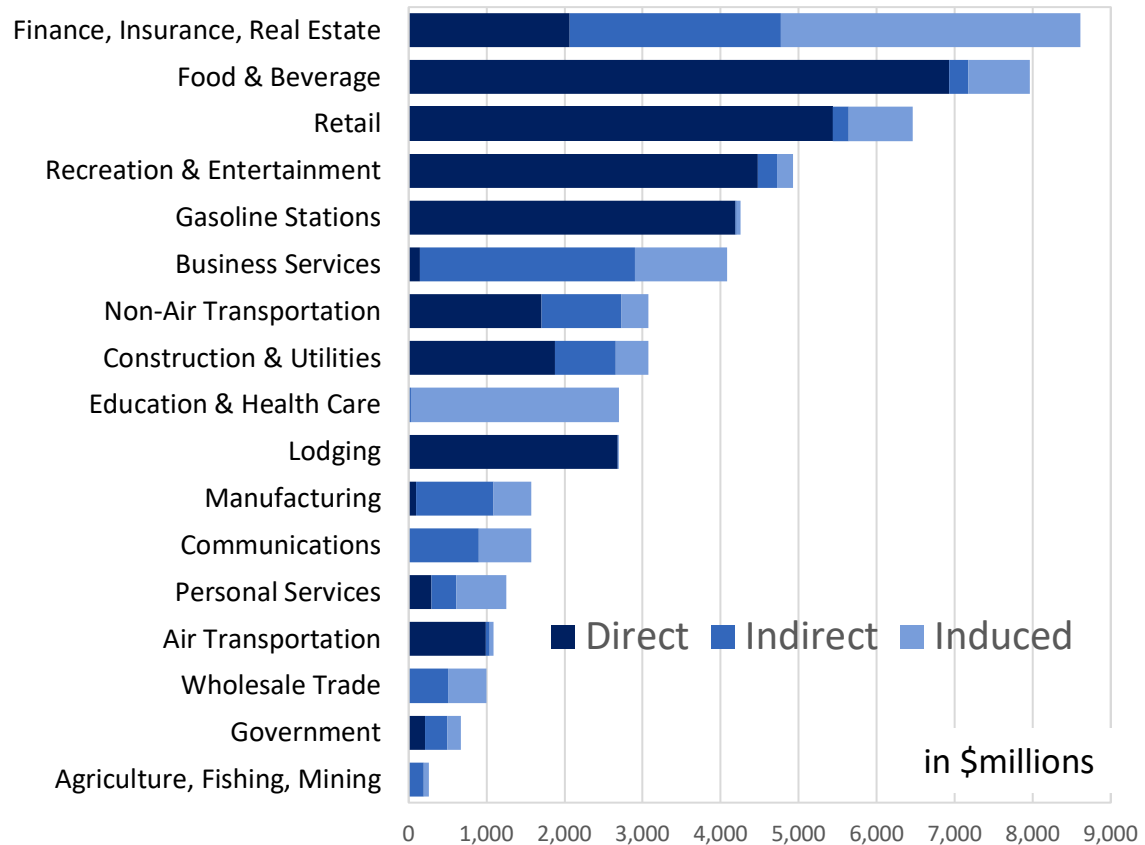
Travel economy impact on business sales by industry, 2020

For industries that directly serve the traveling public (e.g., lodging, recreation, food & beverage, gas stations), the impact of business sales is largely direct, while the greatest impact for several other industries is at the induced and indirect levels.

Several industries with little or no direct interaction with the traveling public also realize a significant benefit in terms of indirect and induced sales ultimately derived from travel and tourism. These include the finance, insurance, and real estate (FIRE) industry, education & health care, manufacturing, and communications sectors.

The business services industry realized \$2.8 billion in sales to businesses that directly serve the traveling public (i.e., the indirect impact from travel and tourism), while the education and health care sector derived 99% of its estimated \$2.7 billion in total sales from the induced impact of travel and tourism on the sector.

Travel economy impact on business sales by industry, 2020



Source: IMPLAN, Tourism Economics

TRAVEL ECONOMY IMPACT ON PA GDP

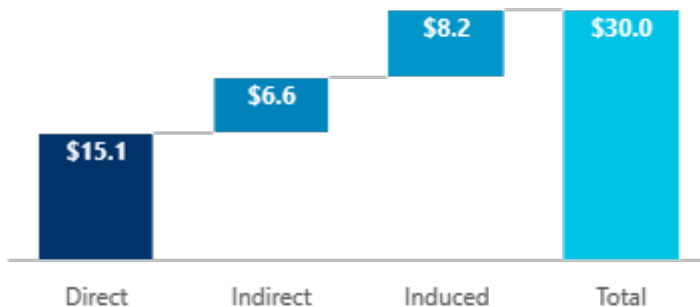
Travel economy impact on Pa Gross Domestic Product (GDP), 2020

The travel and tourism industry had a significant impact on Pa's GDP equal to 3.9% of the state's total GDP in 2020 - but almost a full percentage point below the 4.8% of 2019.

Pennsylvania's travel and tourism industry was responsible for close to \$30 billion of the state's GDP in 2020 - a 23% or \$8.7 billion decline from 2019.

Air transportation, recreation & entertainment, and lodging, i.e., industries with some of the most direct contact with the traveling public, were responsible for almost 50% of the decline in the total impact on GDP derived from travel and tourism, and for close to 75% in the loss of the direct impact on GDP.

Travel economy impact on Pa GDP (in \$billions), 2020



Travel economy impact on GDP by industry, 2020

in \$millions of nominal dollars

Contribution to Pa GDP	Direct Impact	Indirect Impact	Induced Impact	Total Impact
TOTAL	\$15,128	\$6,601	\$8,230	\$29,959
Finance, Insurance, Real Estate	\$1,236	\$1,443	\$2,548	\$5,227
Food & Beverage	3,688	206	437	4,331
Business Services	93	1,984	788	2,864
Lodging	2,565	5	6	2,576
Retail Trade	1,615	100	728	2,443
Recreation & Entertainment	1,927	91	86	2,105
Ground Transportation	1,462	428	147	2,037
Education & Health Care	---	16	1,730	1,747
Construction & Utilities	878	439	233	1,550
Personal Services	360	284	394	1,038
Communications	---	574	336	909
Air Transportation	796	9	17	821
Wholesale Trade	---	397	412	809
Manufacturing	24	328	201	553
Government	195	213	90	498
Gasoline Stations	289	9	48	345
Agriculture, Fishing, Mining	---	75	30	105

Source: IMPLAN, Tourism Economics

TRAVEL ECONOMY IMPACT ON GDP

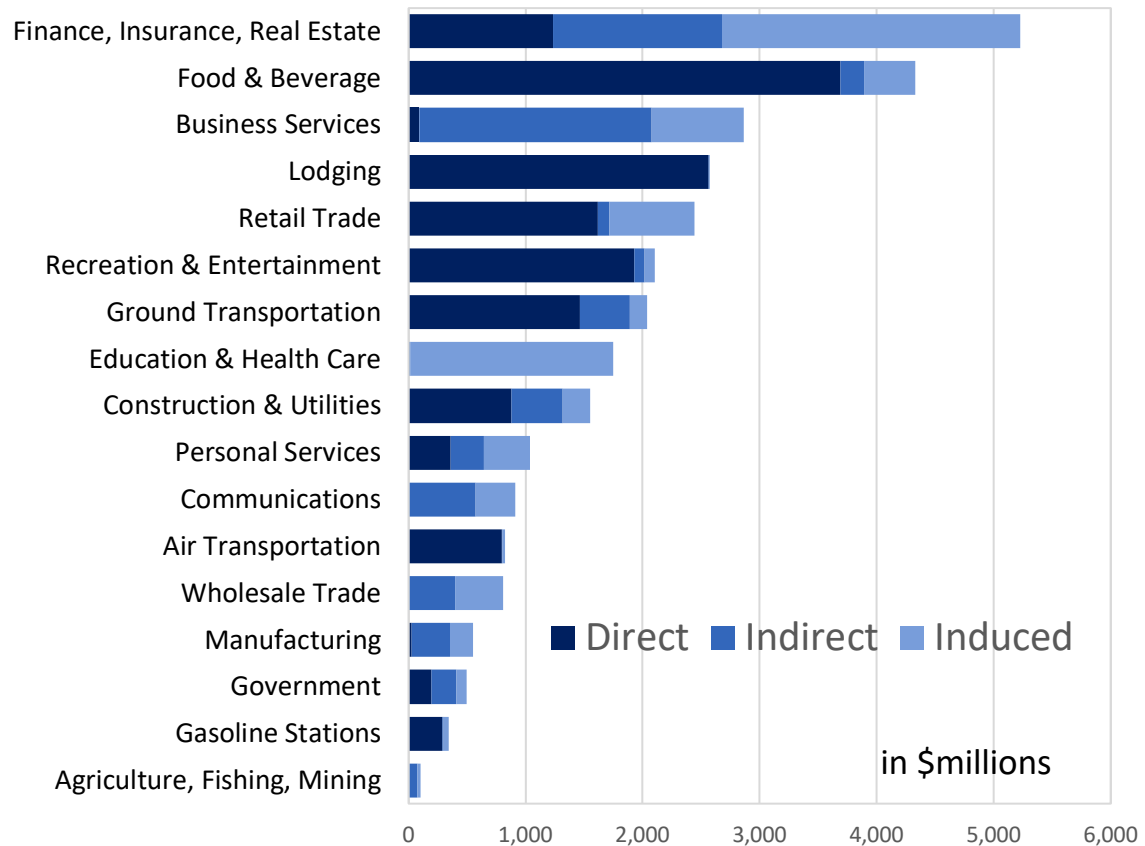
Travel economy impact on GDP, 2020

Pennsylvania businesses are responsible for billions of dollars of the state's gross domestic product that is derived directly and indirectly from the state's travel and tourism industry.

As in prior years, Pennsylvania's Finance, Insurance & Real Estate (FIRE) sector provided the largest contribution to the state's GDP derived from travel and tourism activities in 2020 with three quarters of the industry's \$5.2 billion total resulting from indirect and induced impacts.

Pennsylvania's food & beverage, lodging, and recreation & entertainment sectors had the largest direct impact on the state's GDP derived from travel and tourism. Together, these three sectors accounted for 54% of the industry's total direct impact on Pa's GDP in 2020, or nearly \$8.2 billion.

Travel economy impact on GDP by industry, 2020



Source: IMPLAN, Tourism Economics

TRAVEL ECONOMY IMPACT ON PA EMPLOYMENT

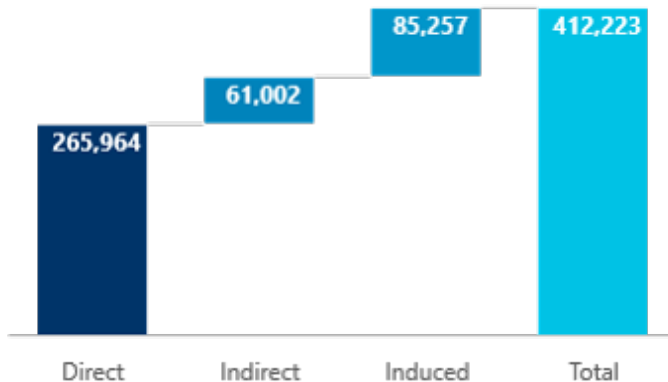
Travel economy impact on Pa employment, 2020

The travel economy had a direct impact on Pa employment equal to 265,960 jobs in 2020 and a total impact of 412,220 jobs that represented 5.7% of all Pa jobs or one out of every 18 jobs.

As seen in every measure of Pa's travel and tourism industry, the pandemic resulted in a substantial loss of employment in the greater travel economy with direct jobs down by 82,100, or 24%, and the loss of total jobs by 108,850, or 21%

Industry sectors with the most direct contact with the traveling public, i.e., food & beverage, lodging, and recreation & entertainment, had the largest employment impact in terms of direct and total jobs supported by the travel and tourism industry in 2020 but also the largest loss of jobs.

Travel economy Pa employment impacts, 2020



Travel economy impact on Pa employment, 2020

Employment derived from Travel and Tourism	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
TOTAL	265,964	61,002	85,257	412,223
Food & Beverage	91,418	4,903	9,743	106,604
Lodging	41,722	60	83	41,865
Recreation & Entertainment	36,413	2,423	2,145	40,980
Retail Trade	27,971	1,271	11,575	40,817
Ground Transportation	27,932	6,096	2,701	36,729
Business Services	1,168	22,086	8,611	31,865
Finance, Insurance, Real Estate	4,983	10,101	10,341	25,425
Education & Health Care	---	432	24,652	25,084
Personal Services	6,650	3,163	7,393	17,207
Construction & Utilities	11,012	1,551	995	13,559
Gasoline Stations	6,476	127	684	7,287
Air Transportation	6,871	96	150	7,118
Government	3,089	1,887	1,088	6,064
Wholesale Trade	---	1,938	2,145	4,082
Manufacturing	258	2,114	1,231	3,604
Communications	---	2,094	1,230	3,324
Agriculture, Fishing, Mining	---	660	490	1,150

Source: IMPLAN, Tourism Economics

TRAVEL ECONOMY IMPACT ON PA EMPLOYMENT

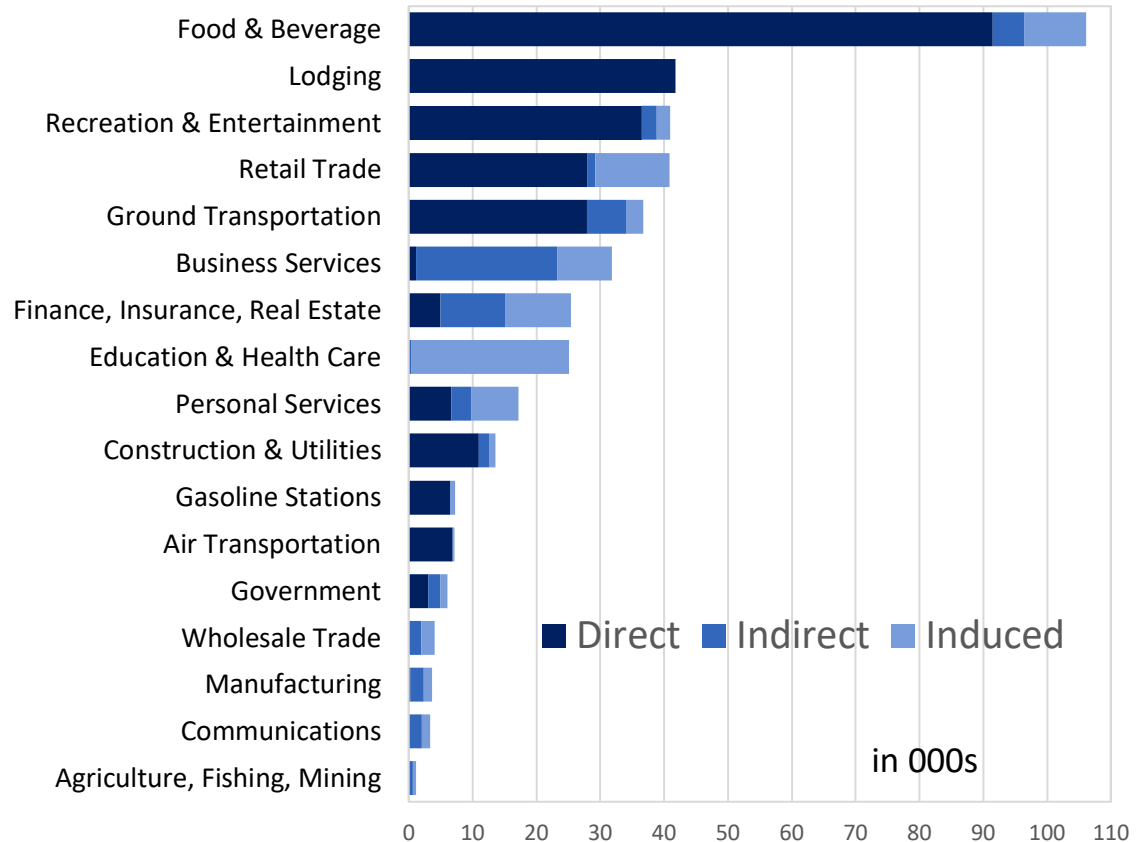
Travel economy impact on Pa employment, 2020

The impact of travel and tourism on jobs for the sectors with direct contact with the traveling public is substantial with thousands of additional jobs derived in sectors as varied as business services, communications, and wholesale trade.

A majority of jobs supported by travel and tourism in the business services, manufacturing, and communications sectors in 2020 were due to the products and services they provided to businesses directly serving the traveling public, i.e., the indirect jobs impact.

For business services, nearly 70% of the total number of jobs supported by travel was in the form of indirect jobs. While the indirect impact was slightly smaller for the communications and manufacturing sectors at 63% and 59%, respectively, it was still substantial.

Travel economy impact on Pa employment, 2020
in thousands



Source: IMPLAN, Tourism Economics

TRAVEL ECONOMY IMPACT ON PA PERSONAL INCOME

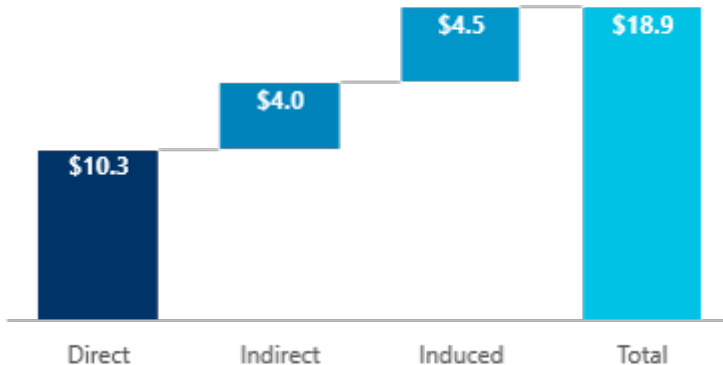
Travel economy impact on Pa personal income, 2020

The travel and tourism industry was directly responsible for close to \$10.3 billion in income for those employed in businesses directly serving the traveling public and for nearly \$18.9 billion in total when indirect and induced impacts are included.

The amount of total labor income derived from travel and tourism in 2020 declined by \$5.0 billion, or 21% - the same percentage decline as in travel- and tourism-supported employment.

While the number of jobs directly supported by the travel industry accounted for 65% of the total number of travel-supported jobs, the direct impact on labor income was lower at 54% of the total amount of labor income derived from travel and tourism.

Travel economy personal income impacts (\$ billions), 2020



Travel economy impact on Pa personal income, 2020

in millions of nominal dollars

Personal Income derived from Travel and Tourism	Direct Income	Indirect Income	Induced Income	Total Income
TOTAL	\$10,281	\$4,044	\$4,549	\$18,874
Food & Beverage	\$2,185	\$ 128	\$ 258	\$2,571
Business Services	65	1,532	621	2,218
Ground Transportation	1,293	356	125	1,774
Finance, Insurance, Real Estate	466	566	652	1,684
Recreation & Entertainment	1,514	84	60	1,657
Lodging	1,527	2	3	1,532
Education & Health Care	---	16	1,509	1,525
Retail Trade	862	55	351	1,269
Construction & Utilities	772	181	97	1,050
Air Transportation	833	11	15	858
Personal Services	257	190	321	768
Communications	---	411	174	585
Government	272	150	67	488
Wholesale Trade	---	180	183	364
Manufacturing	20	152	77	250
Gasoline Stations	216	4	20	241
Agriculture, Fishing, Mining	---	27	13	40

Source: IMPLAN, Tourism Economics

TRAVEL ECONOMY IMPACT ON PA PERSONAL INCOME

Travel economy impact on Pa personal income, 2020

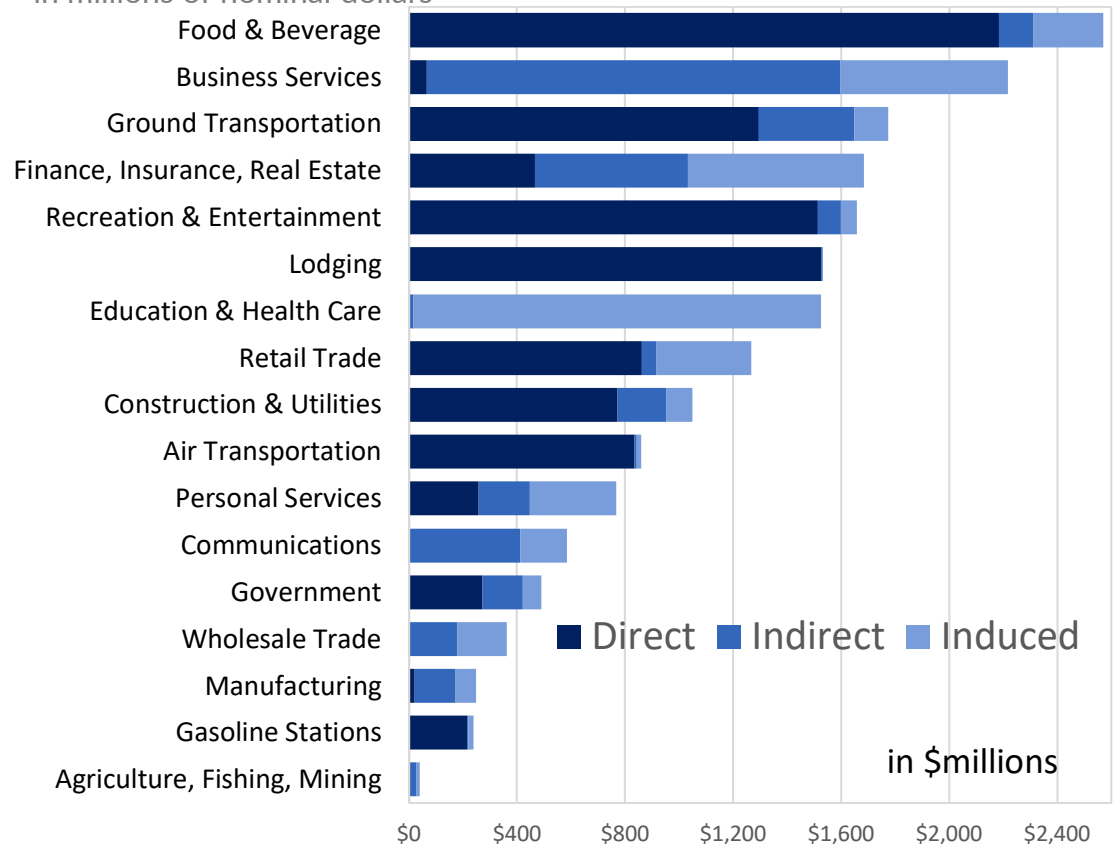
Several sectors with the highest amount of personal income derived from travel and tourism had little to no direct contact with the traveling public.

There are nine industries in which traveler activity supported more than \$1 billion in personal income in 2020. These range from the obvious—food & beverages and lodging, to the less obvious—business services and education & health care.

Despite ranking sixth in terms of jobs supported by travel and tourism, the higher wages provided by the business services sector resulted in \$2.2 billion in personal income supported by traveler activity - the second largest impact among the various industries.

Travel economy impact on Pa personal income, 2020

in millions of nominal dollars



Source: IMPLAN, Tourism Economics

TRAVEL ECONOMY IMPACT ON TAXES

Travel economy impact on federal, state, and local taxes, 2016-2020

Traveler spending, income from jobs supported by travel and tourism, and business sales generated an estimated \$7.6 billion in tax revenues for the federal, state, and local governments in 2020.

Tax revenues in 2020 were down 24% in total from 2019 and by 22% and 26%, respectively, for the federal and state/local governments – yet another indication of the severe negative impacts caused by the pandemic and the resulting substantial declines in travelers and traveler spending and the shift away from overnight to day-trip travel in 2020.

Nevertheless, the billions of dollars in tax revenues derived from travel and tourism provide a major benefit to Pennsylvania households, saving each household from an additional \$710 in state and local taxes.

Travel economy impact on federal, state, and local taxes, 2016-2020
in \$millions

TAX REVENUES	2016	2017	2018	2019	2020
TOTAL	\$9,047	\$9,318	\$9,658	\$10,046	\$7,649
Federal	\$4,637	\$4,801	\$5,013	\$5,235	\$4,071
Personal Income	1,408	1,453	1,540	1,608	1,278
Corporate	484	501	549	573	398
Indirect Business	410	415	422	440	341
Social Insurance	2,336	2,432	2,503	2,615	2,053
State & Local	\$4,410	\$4,517	\$4,645	\$4,811	\$3,578
Sales	1,611	1,650	1,697	1,743	1,142
Room Tax	183	200	218	229	108
Personal Income	436	456	481	493	411
Corporate	259	254	235	246	169
Social Insurance	34	36	35	36	24
Excise & Fees	568	570	555	579	414
Property	1,318	1,350	1,424	1,485	1,310

Source: IMPLAN, Tourism Economics

TRAVEL ECONOMY IMPACT ON TAXES

Travel economy impact on state and local taxes, 2020

Pennsylvania state and local governments received an estimated \$1.8 billion each in tax revenues derived from travel and tourism in 2020.

The state’s 6% sales tax accounted for 60% of the state tax revenues derived from travel and tourism in 2020, followed by revenues from the personal income tax which accounted for an additional 15% of the state travel-related tax receipts.

For local governments, the \$1.3 billion in property taxes provided nearly three-quarters of the local tax revenues derived from travel and tourism in 2020.

Travel economy impact on state & local taxes, 2020

Amounts in millions of dollars

	State	Local
Tax Revenues	\$1,769	\$1,810
Sales	\$1,066	\$76
Bed tax	\$0	\$108
Personal income	\$269	\$142
Corporate	\$169	\$0
Social insurance	\$24	\$0
Excise and fees	\$237	\$177
Property	\$0	\$1,307

Source: IMPLAN, Tourism Economics

ECONOMIC IMPACT IN CONTEXT

ECONOMIC IMPACTS IN CONTEXT

Figures in context



Visitor spending

Stacking \$29 billion worth of \$10 bills would reach 196 miles high– similar to the distance from Bradford to Uniontown, across Pennsylvania north to south.



Pandemic losses were significant

The \$17 billion in visitor spending losses is similar in size to what Amazon has invested in Pennsylvania over the last DECADE. The nearly 110,000 jobs lost is similar to all jobs in Erie County disappearing.



Employment

Tourism supports 412,000 Pennsylvania jobs in 2020–enough to nearly fill Beaver Stadium for four Penn State games.



Taxes

To make up for the \$3.6 billion in state and local taxes generated by visitor activity, each household in the state would need to contribute \$710 to maintain the current level of government.

REGION & COUNTY ANALYSIS

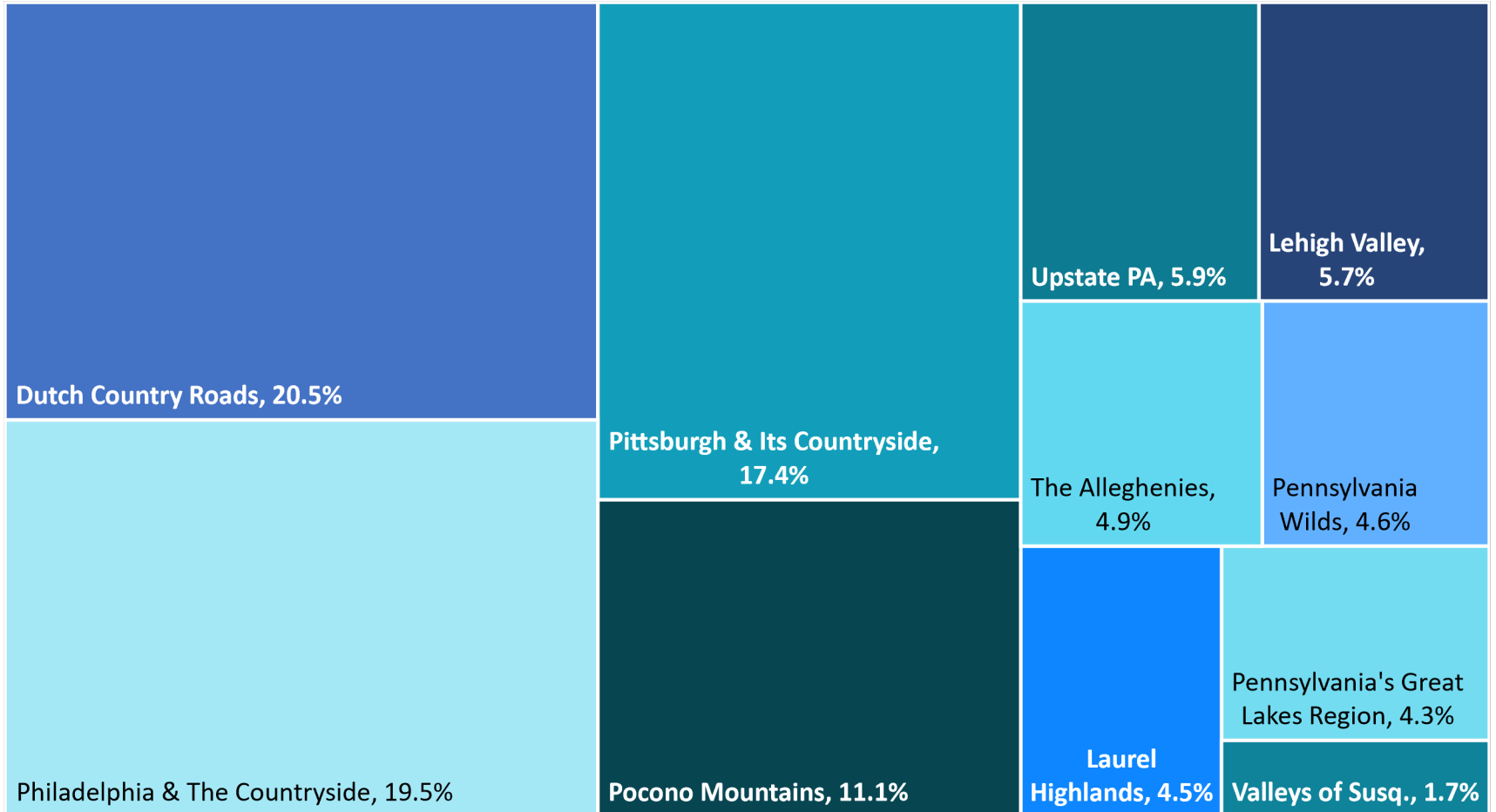
Traveler Spending and Economic Impact Pennsylvania's Tourism Regions 2020



PENNSYLVANIA TOURISM REGIONS

Regional share of PA total traveler spending, 2020

Regional Share of Traveler Spending, 2020



Source: Tourism Economics

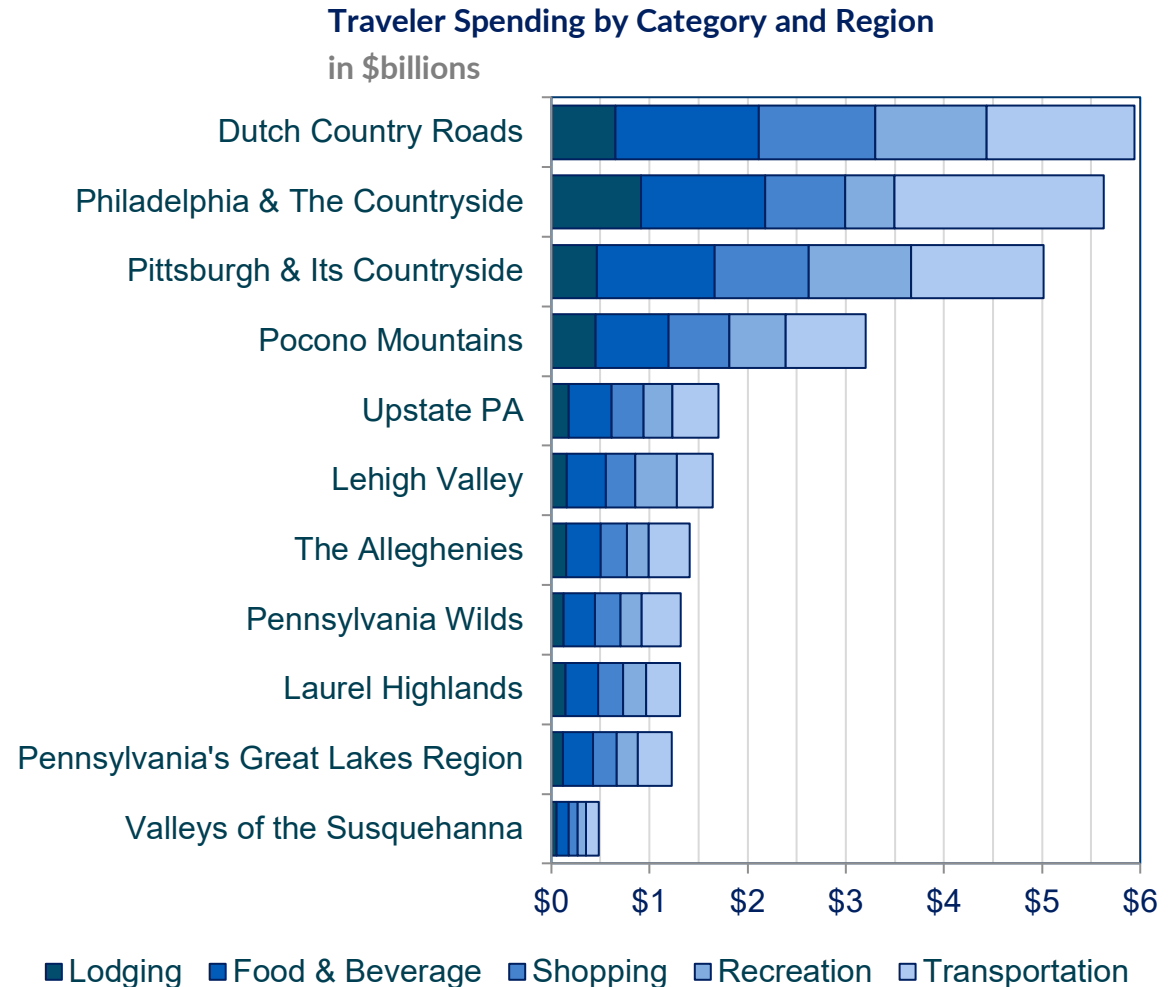
PA TOURISM REGIONS – SPENDING BY CATEGORY

Traveler spending by category per region, 2020

There was some shifting in rankings for total visitor spending among Pa’s tourism regions in 2020 vs. 2019 as certain regions experienced smaller losses than other regions.

Although total visitor spending in the Dutch Country Roads region was down by slightly more than a third in 2020, the decline was well below that experienced by the Philadelphia and Its Countryside region, which experienced a nearly 50% loss. As a result, the Dutch Country Roads region became the leading Pa region for visitor spending in 2020.

Regions with relatively large amounts of outdoor product experienced relatively smaller losses in total visitor spending compared to largely urban destinations, with Upstate PA and the Pennsylvania Wilds region each increasing its visitor spending ranking relative to other tourism regions.



PA TOURISM REGIONS – SPENDING BY CATEGORY

Traveler Spending by Category and Region, 2020

For most regions, the share of traveler dollars going to lodging expenses experienced the largest decline among the major spending categories in 2020.

With trips closer to home and a shift to day-trip travel, most regions saw a shift in traveler spending with larger shares of trip dollars allocated for food & beverages and for shopping/retail.

Despite the 55% drop in traveler spending on transportation costs for the Philadelphia and The Countryside region – the largest percentage decline of any region, as in prior years the region still had the largest share of trip dollars allocated for transportation in 2020.

The Lehigh Valley region continued to have the largest share of traveler dollars allocated for recreation among Pa’s tourism regions in 2020 despite the 40% drop in spending from 2019.

Traveler Spending by Category and Region, 2020
Percent of Region Total

Dutch Country Roads	11%	25%	20%	19%	25%
Philadelphia & The Countryside	16%	22%	15%	9%	38%
Pittsburgh & Its Countryside	9%	24%	19%	21%	27%
Pocono Mountains	14%	23%	19%	18%	26%
Upstate PA	10%	26%	19%	17%	28%
Lehigh Valley	10%	24%	18%	26%	22%
The Alleghenies	11%	25%	19%	16%	30%
Pennsylvania Wilds	9%	24%	19%	16%	30%
Laurel Highlands	11%	25%	20%	18%	26%
Pennsylvania's Great Lakes Region	10%	25%	20%	17%	28%
Valleys of the Susquehanna	11%	26%	19%	17%	27%

■ Lodging
 ■ Food & Beverage
 ■ Shopping
 ■ Recreation
 ■ Transportation

PA TOTAL TRAVEL ECONOMY EMPLOYMENT AND INTENSITY

Travel-supported employment and intensity by Pa tourism region, 2020

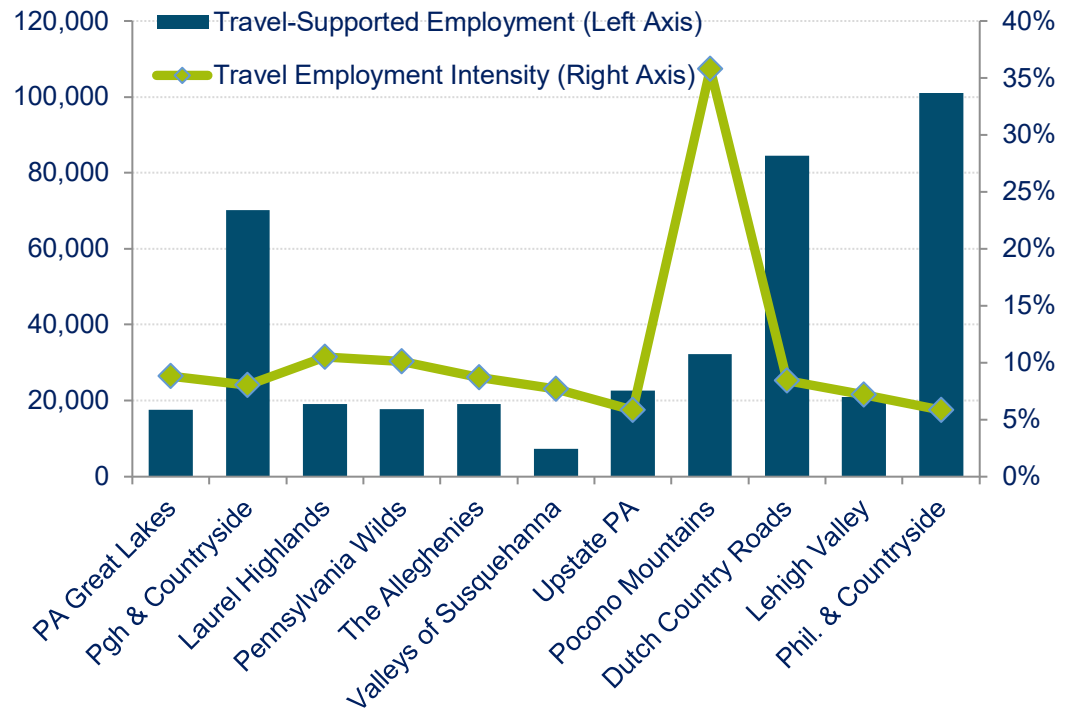
The reliance on travelers for employment varies by tourism region – from a low of 6% to a high of 38% with employment intensity for most regions in the range of 8% to 10% in 2020.

Travel Economy Employment Intensity is the measure of each region’s dependence on the travel industry for employment.

As in prior years, the Philadelphia & The Countryside had the highest number of persons employed by the travel industry but ranked lowest in terms of employment intensity with its large and diverse economy.

The Pocono Mountains region remained by far the most dependent Pa tourism region for travel-related employment with close to four out of every 10 jobs relying on visitors.

Travel-supported employment and intensity by Pa tourism region, 2020



PENNSYLVANIA'S GREAT LAKES REGION

Visitor spending summary, 2020

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

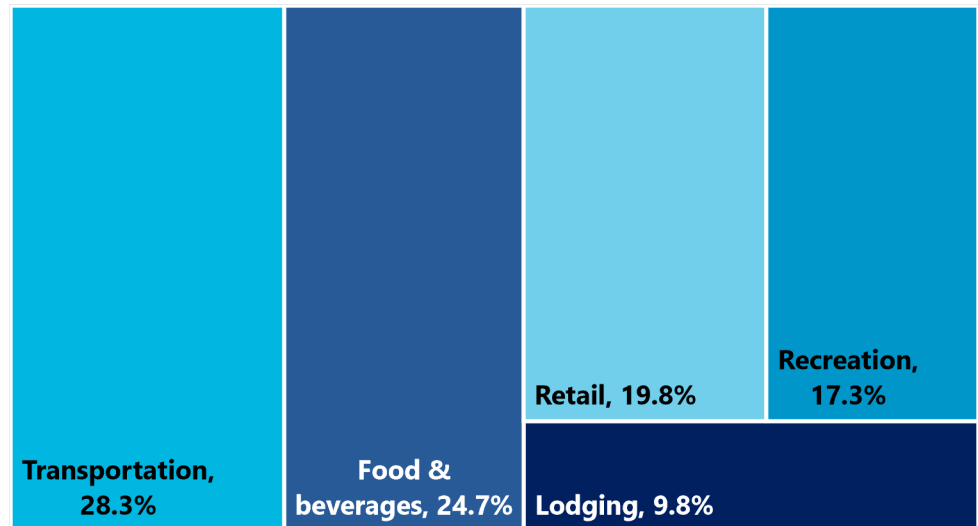
Travelers spent an estimated \$1.2 billion in Pennsylvania's Great Lakes Region in 2020 – the lowest visitor spending level in more than a decade and reflecting an estimated \$506 million, or nearly 30%, decrease from 2019.

As in 2019, the region ranked 10th among the state's 11 tourism regions in total visitor spending.

Spending was down for each major category with the largest declines in percentage terms seen in lodging (-39%), recreation (-36%), and transportation (-32%) compared to 2019. The declines were less severe for food & beverage purchases (-23%), and shopping/retail (-18%). In dollar terms, transportation experienced the largest loss (-\$166 million) followed by recreation (-\$118 million), food and beverage (-\$91 million), lodging (-\$78 million), and shopping/retail (-\$53 million).

Traveler spending by category, 2020

Percent of region total



Source: Tourism Economics

PENNSYLVANIA'S GREAT LAKES REGION

Travel and tourism impact on region's labor income and employment, 2020

The travel and tourism industry suffered some of the largest pandemic-related employment losses of any industry but still managed to play a significant role in the region's economy.

The chart shows the travel and tourism economy's share of the region's total economy in terms of labor income and employment, and includes the direct, indirect, and induced impacts.

The travel and tourism industry directly supported more than 11,000 jobs in the region and 17,600 in total in 2020, with both down by roughly 20% from the prior year.

The industry provided 6.5% of the labor income earned in the region – a 1.6 percentage point decline from 2019, and supported 8.8% of regional employment in 2020, down 1.3 percentage points.

While the region ranked 10th in the total number of jobs supported by travel and tourism among Pennsylvania's 11 tourism regions, the region ranked 4th for employment intensity and 5th for labor income as a share of the region's total economy in 2020.

Travel and Tourism Share of Regional Economy, 2020



Source: Tourism Economics, BLS

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	2020
Crawford	\$219.7	\$241.5	\$250.8	\$260.3	\$265.6	\$259.0	\$258.1	\$248.1	\$251.7	\$248.6	\$253.0	\$177.3
Erie	\$741.2	\$829.4	\$897.4	\$930.7	\$925.4	\$941.2	\$960.9	\$969.4	\$988.8	\$996.5	\$1,019.3	\$732.8
Mercer	\$233.2	\$256.0	\$279.7	\$304.9	\$319.9	\$315.9	\$315.4	\$307.4	\$305.7	\$313.7	\$314.8	\$221.1
Venango	\$108.7	\$118.3	\$124.0	\$132.1	\$130.9	\$132.6	\$144.9	\$140.3	\$141.1	\$146.5	\$146.2	\$96.4
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	\$1,227.6
Percent Change		10.9%	7.4%	4.9%	0.8%	0.4%	1.9%	-0.8%	1.3%	1.1%	1.6%	-29.2%

Tourism Industry Employment Impacts

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Crawford	2,091	2,160	2,171	2,122	2,150	2,151	2,166	2,156	2,123	2,109	2,129	1,738
Erie	6,674	7,004	7,181	7,347	7,516	7,639	7,715	7,768	7,796	7,846	7,983	6,161
Mercer	2,343	2,417	2,485	2,557	2,614	2,640	2,627	2,584	2,561	2,561	2,595	2,052
Venango	1,113	1,138	1,153	1,143	1,158	1,166	1,188	1,196	1,192	1,214	1,231	1,066
Great Lakes	12,221	12,719	12,989	13,169	13,437	13,596	13,696	13,705	13,672	13,730	13,938	11,018
Percent Change		4.1%	2.1%	1.4%	2.0%	1.2%	0.7%	0.1%	-0.2%	0.4%	1.5%	-20.9%

Source: Tourism Economics

PENNSYLVANIA'S GREAT LAKES REGION

Traveler spending by category, 2019 and 2020

Travel & Tourism Spending (Direct Sales)

In \$millions

By County, 2020	Lodging	Food & beverages	Retail	Recreation	Transportation	Total
Crawford	10.4	46.9	33.7	25.2	61.0	177.3
Erie	82.3	181.5	143.4	139.1	186.6	732.8
Mercer	22.1	56.3	50.1	35.8	56.8	221.1
Venango	6.1	19.0	16.3	12.6	42.5	96.4
Great Lakes	120.8	303.7	243.4	212.7	346.9	1,227.6
Percent Change	-39.3%	-23.0%	-17.8%	-35.7%	-32.4%	-29.2%
By County, 2019						
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

Source: Tourism Economics

PENNSYLVANIA'S GREAT LAKES REGION

Tourism Satellite Account Measures, 2019 and 2020

Tourism Satellite Account

In \$millions

By County, 2020	Visitor Spending	Government	Investment/ PCE	Total Tourism Demand
Crawford	177.3	0.6	13.5	191.3
Erie	732.8	4.2	51.9	789.0
Mercer	221.1	0.9	15.7	237.7
Venango	96.4	0.3	7.3	104.0
Great Lakes	1,227.6	6.0	88.4	1,321.9
Percent Change	-29.2%	-26.4%	-11.9%	-28.2%
By County, 2019				
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

Source: Tourism Economics

PENNSYLVANIA'S GREAT LAKES REGION

Travel Industry (direct) Impacts, 2019 and 2020

Travel Industry (Direct) Impacts in \$millions, except employment (in units))

By County, 2020	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Crawford	177.3	1,738	44.4	10.0	12.0
Erie	732.8	6,161	179.8	42.8	49.0
Mercer	221.1	2,052	51.3	12.3	14.3
Venango	96.4	1,066	26.3	5.6	6.9
Great Lakes	1,227.6	11,018	301.8	70.6	82.1
Percent Change	-29.2%	-20.9%	-22.4%	-26.7%	-5.9%
By County, 2019					
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

Source: Tourism Economics

PENNSYLVANIA'S GREAT LAKES REGION

Travel Economy Impacts, 2019 and 2020

Travel Economy Impacts

In \$millions, except employment (in units))

By County, 2020	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Crawford	191.3	2,820	88.3	19.4	21.6
Erie	789.0	9,825	359.9	81.4	88.0
Mercer	237.7	3,275	101.5	23.6	25.7
Venango	104.0	1,679	49.4	10.9	12.3
Great Lakes	1,321.9	17,598	599.2	135.3	147.6
Percent Change	-28.2%	-18.8%	-20.1%	-18.5%	-16.0%
By County, 2019					
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	21,659.8	749.9	166.0	175.7

Source: Tourism Economics

LAUREL HIGHLANDS

Visitor spending summary, 2020

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

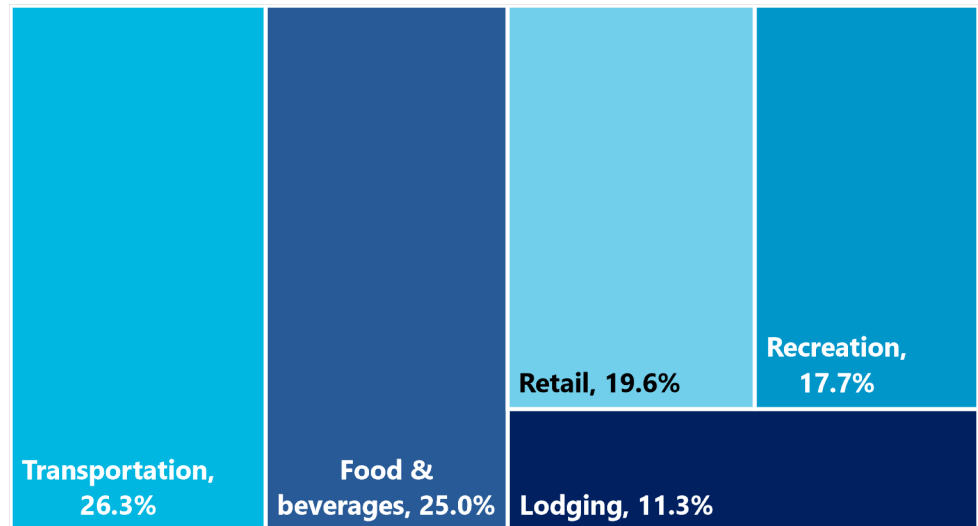
Travelers spent an estimated \$1.3 billion in the Laurel Highlands region in 2020, a 32% decrease from 2019 with traveler spending down by more than \$610 million – the lowest visitor spending level in more than a decade.

The region ranked 9th among the state's 11 tourism regions in total visitor spending in 2020, down from 8th in 2019.

Spending was down for each major category with the largest declines in percentage terms seen in lodging (-45%), recreation (-35%), and transportation (-33%). The declines were less severe for food & beverage purchases (-27%) and shopping/retail (-22%) compared to 2019. In dollar terms, transportation experienced the largest loss (-\$171 million) followed by recreation (-\$127 million), lodging (-\$124 million), food & beverage (-\$118 million), and shopping/retail (-\$73 million).

Traveler spending by category, 2020

Percent of region total



Source: Tourism Economics

LAUREL HIGHLANDS

Travel and tourism impact on region's labor income and employment, 2020

The travel and tourism industry suffered some of the largest pandemic-related employment losses of any industry but still managed to play a significant role in the Laurel Highland region's economy.

The chart shows the travel and tourism economy's share of the region's total economy in terms of labor income and employment, and includes the direct, indirect, and induced impacts.

The travel and tourism industry directly supported more than 12,000 jobs in the region and close to 19,100 in total in 2020, with both down by roughly 20% from the prior year.

The industry provided 8.2% of the labor income earned in the region – a 1.6 percentage point decline from 2019, and supported 10.5% of regional employment in 2020, down 1.3 percentage points.

While the region ranked 7th in the total number of jobs supported by travel and tourism among Pennsylvania's 11 tourism regions, the region ranked 2nd for both employment intensity and labor income as a share of the region's total economy in 2020.

Travel and Tourism Share of Regional Economy, 2020



Source: Tourism Economics, BLS

LAUREL HIGHLANDS

Timeline

Tourism Industry Spending

Amounts in millions of nominal dollars

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Fayette	\$538.2	\$595.7	\$636.0	\$643.9	\$663.8	\$677.5	\$667.2	\$661.8	\$684.8	\$690.2	\$733.8	\$457.9
Somerset	\$306.9	\$330.1	\$371.0	\$378.7	\$380.2	\$387.6	\$399.9	\$377.4	\$392.0	\$398.7	\$416.8	\$331.4
Westmoreland	\$587.6	\$651.6	\$724.7	\$745.9	\$742.6	\$772.4	\$753.9	\$721.3	\$745.4	\$758.5	\$772.7	\$521.2
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	\$1,310.4
Percent Change		10.1%	9.8%	2.1%	1.0%	2.8%	-0.9%	-3.3%	3.5%	1.4%	4.1%	-31.9%

Tourism Industry Employment Impacts

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Fayette	5,047	5,219	5,295	5,417	5,808	5,836	5,834	5,852	5,914	5,821	5,985	4,709
Somerset	3,255	3,234	3,257	3,193	3,285	3,331	3,322	3,233	3,261	3,281	3,345	2,626
Westmoreland	5,243	5,369	5,476	5,632	5,716	5,764	5,661	5,649	5,703	5,744	5,855	4,666
Laurel Highlands	13,544	13,822	14,028	14,242	14,809	14,932	14,817	14,735	14,878	14,846	15,185	12,001
Percent Change		2.1%	1.5%	1.5%	4.0%	0.8%	-0.8%	-0.6%	1.0%	-0.2%	2.3%	-21.0%

Source: Tourism Economics

LAUREL HIGHLANDS

Visitor Spending

Tourism Direct Sales (millions)

By County, 2020	Lodging	Food & beverages	Retail	Recreation	Transportation	Total
Fayette	64.0	115.5	87.1	83.6	107.6	457.9
Somerset	44.3	83.7	60.1	55.5	87.8	331.4
Westmoreland	40.0	128.7	109.6	93.4	149.6	521.2
Laurel Highlands	148.3	327.8	256.8	232.4	345.0	1,310.4
Percent Change	-45.5%	-26.5%	-22.1%	-35.4%	-33.1%	-31.9%
By County, 2019						
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

Source: Tourism Economics

LAUREL HIGHLANDS

TSA Categories

Tourism Satellite Account (millions)

By County, 2020	Visitor Spending	Government	Investment/ PCE	Total Tourism Demand
Fayette	457.9	2.0	32.5	492.4
Somerset	331.4	1.5	24.1	357.0
Westmoreland	521.2	2.1	37.2	560.4
Laurel Highlands	1,310.4	5.7	93.8	1,409.8
Percent Change	-31.9%	-25.4%	-15.8%	-31.0%

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

Source: Tourism Economics

LAUREL HIGHLANDS

Direct Impacts

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

By County, 2020	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Fayette	457.9	4,709	156.7	30.2	37.9
Somerset	331.4	2,626	71.8	18.1	20.6
Westmoreland	521.2	4,666	127.3	29.4	34.7
Laurel Highlands	1,310.4	12,001	355.9	77.8	93.2
Percent Change	-31.9%	-21.0%	-20.8%	-27.4%	-6.0%
By County, 2019					
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

Source: Tourism Economics

LAUREL HIGHLANDS

Total Impacts

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

By County, 2020	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Fayette	492.4	6,988	323.4	58.6	67.9
Somerset	357.0	3,940	147.1	34.6	37.0
Westmoreland	560.4	8,134	264.2	56.9	62.4
Laurel Highlands	1,409.8	19,062	734.6	150.1	167.4
Percent Change	-31.0%	-18.5%	-16.2%	-19.2%	-16.2%
By County, 2019					
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	23,400.5	876.7	185.7	199.8

Source: Tourism Economics

PITTSBURGH & ITS COUNTRYSIDE

Visitor spending summary, 2020

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

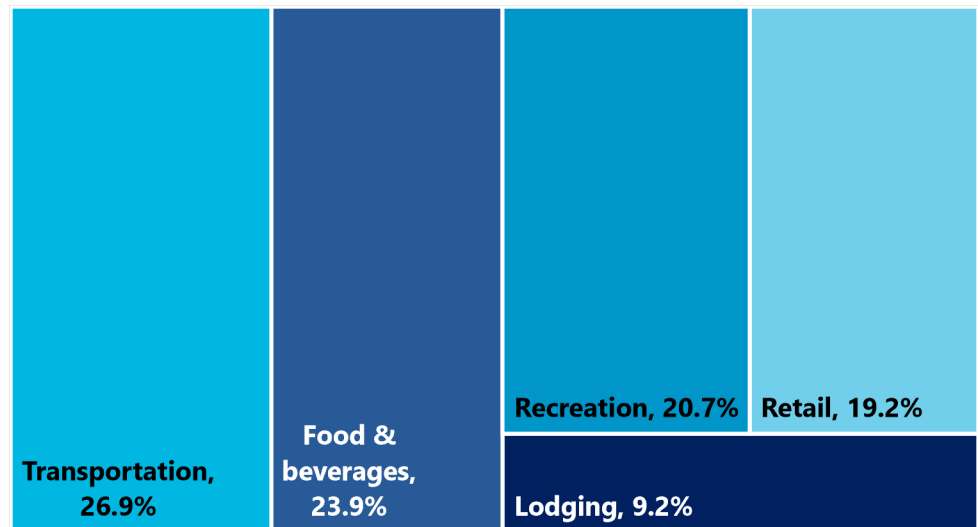
Travelers spent an estimated \$5.1 billion in the Pittsburgh and Its Countryside region in 2020, a 42% decline from 2019 with traveler spending down by nearly \$3.7 billion– the lowest visitor spending level in well over a decade.

As in 2019, the region ranked 3rd among the state’s 11 tourism regions in total visitor spending.

Spending was down for each major category with the largest declines in percentage terms seen in lodging (-57%) with conventions and large meetings previously scheduled in the region cancelled for much of 2020, transportation (-47%), and recreation (-44%). The decline was less severe for food & beverage purchases (-35%) and shopping/retail (-31%) compared to 2019. In dollar terms, transportation experienced the largest loss (-\$1.2 billion) followed by recreation (-\$805 million), food & beverage (-\$639 million), lodging (-\$603 million), and shopping/retail (-\$424 million).

Traveler spending by category, 2020

Percent of region total



Source: Tourism Economics

PITTSBURGH & ITS COUNTRYSIDE

Travel and tourism impact on region's labor income and employment, 2020

The Pittsburgh and Its Countryside region's travel and tourism industry suffered some of the largest pandemic-related employment losses of any industry but still managed to play a significant role in the region's economy.

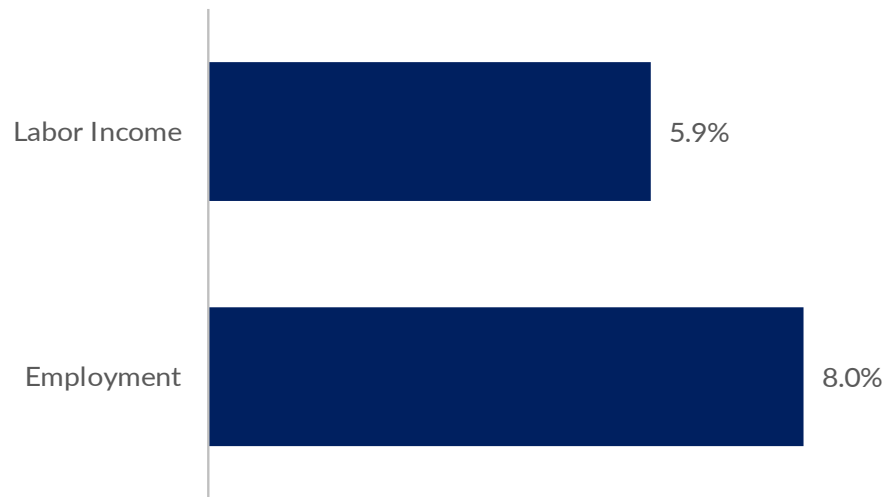
The chart shows the travel and tourism economy's share of the region's total economy in terms of labor income and employment, and includes the direct, indirect, and induced impacts.

The travel and tourism industry directly supported close to 43,500 jobs in the region and nearly 70,200 in total in 2020, with declines of 27% and 23%, respectively from the prior year.

The industry provided 5.9% of the labor income earned in the region – a 1.8 percentage point decline from 2019, and supported 8.0% of regional employment in 2020, down 1.4 percentage points from 2019.

While the region ranked 3rd in the total number of jobs supported by travel and tourism among Pennsylvania's 11 tourism regions, the region ranked 7th for employment intensity and 8th for labor income as a share of the region's total economy in 2020.

Travel and Tourism Share of Regional Economy, 2020



Source: Tourism Economics, BLS

PITTSBURGH & ITS COUNTRYSIDE

Timeline

Tourism Industry Spending

Amounts in millions of nominal dollars

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
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	\$3,601.7
Armstrong	\$58.6	\$71.3	\$84.0	\$89.8	\$91.3	\$90.9	\$88.9	\$88.5	\$92.4	\$93.2	\$93.7	\$68.3
Beaver	\$196.0	\$217.2	\$237.4	\$244.9	\$249.8	\$256.4	\$267.0	\$270.5	\$283.4	\$292.0	\$311.8	\$220.7
Butler	\$406.1	\$440.6	\$485.7	\$578.8	\$582.1	\$597.6	\$604.2	\$592.1	\$593.7	\$613.9	\$632.0	\$399.0
Greene	\$58.7	\$68.9	\$74.6	\$80.4	\$91.9	\$94.7	\$89.2	\$76.1	\$78.5	\$83.6	\$78.7	\$58.2
Indiana	\$144.5	\$154.2	\$169.7	\$184.3	\$179.1	\$175.3	\$162.0	\$155.4	\$162.1	\$165.7	\$170.9	\$111.2
Lawrence	\$83.7	\$98.6	\$113.4	\$118.9	\$117.9	\$119.6	\$120.1	\$120.2	\$126.8	\$130.0	\$133.2	\$96.5
Washington	\$482.3	\$582.7	\$668.4	\$740.7	\$755.3	\$760.3	\$747.0	\$662.6	\$703.7	\$737.3	\$714.3	\$460.7
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	\$5,016.3
Percent Change		11.7%	9.3%	6.6%	1.5%	1.7%	3.7%	-1.9%	3.3%	3.9%	2.5%	-42.4%

Tourism Industry Employment Impacts

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Allegheny	36,188	37,302	38,112	39,094	39,964	40,254	40,888	41,530	42,295	43,080	43,848	30,892
Armstrong	484	554	559	568	573	576	584	594	608	621	621	535
Beaver	1,977	1,965	1,975	1,997	2,048	2,070	2,096	2,111	2,124	2,157	2,235	1,874
Butler	3,664	3,740	3,828	3,941	3,996	4,050	4,048	4,074	4,073	4,162	4,199	3,283
Greene	419	479	479	483	485	488	487	483	486	505	509	450
Indiana	1,347	1,351	1,381	1,427	1,450	1,460	1,426	1,421	1,443	1,484	1,506	1,161
Lawrence	806	873	877	896	907	917	909	927	933	954	976	831
Washington	5,026	5,570	5,740	5,840	5,949	5,953	5,948	5,856	5,875	6,000	5,974	4,448
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	43,472
Percent Change		3.9%	2.2%	2.4%	2.1%	0.7%	1.1%	1.1%	1.5%	1.9%	1.5%	-27.4%

Source: Tourism Economics

PITTSBURGH & ITS COUNTRYSIDE

Visitor Spending

Tourism Direct Sales (millions)

By County, 2020	Lodging	Food & beverages	Retail	Recreation	Transportation	Total
Allegheny	340.8	848.1	686.5	762.9	963.4	3,601.7
Armstrong	3.6	16.0	10.7	17.3	20.6	68.3
Beaver	18.5	55.6	41.8	36.0	68.9	220.7
Butler	38.7	101.0	86.2	65.7	107.4	399.0
Greene	5.8	14.9	10.1	9.2	18.1	58.2
Indiana	9.4	30.1	22.4	18.0	31.3	111.2
Lawrence	4.3	27.1	19.9	20.6	24.6	96.5
Washington	41.3	106.7	84.8	111.0	116.8	460.7
Pittsburgh and its Countryside	462.5	1,199.6	962.5	1,040.6	1,351.1	5,016.3
Percent Change	-56.6%	-34.8%	-30.6%	-43.6%	-47.4%	-42.4%
By County, 2019						
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

PITTSBURGH & ITS COUNTRYSIDE

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

By County, 2020	Visitor Spending	Government	Investment/ PCE	Total Tourism Demand
Allegheny	3,601.7	19.6	254.1	3,875.3
Armstrong	68.3	0.2	5.0	73.5
Beaver	220.7	0.8	15.6	237.1
Butler	399.0	1.6	28.4	429.0
Greene	58.2	0.2	4.2	62.5
Indiana	111.2	0.4	8.0	119.6
Lawrence	96.5	0.2	6.9	103.6
Washington	460.7	1.9	32.7	495.2
Pittsburgh and its Countryside	5,016.3	24.8	354.8	5,395.9
Percent Change	-42.4%	-52.3%	-29.6%	-41.7%
By County, 2019				
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

Source: Tourism Economics

PITTSBURGH & ITS COUNTRYSIDE

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

By County, 2020	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Allegheny	3,601.7	30,892	1,252.6	243.3	301.5
Armstrong	68.3	535	14.7	3.6	4.2
Beaver	220.7	1,874	57.8	12.8	15.3
Butler	399.0	3,283	96.4	22.4	26.4
Greene	58.2	450	10.9	2.9	3.3
Indiana	111.2	1,161	29.3	6.5	7.8
Lawrence	96.5	831	23.3	5.2	6.4
Washington	460.7	4,448	150.9	29.6	37.0
Pittsburgh and its Countryside	5,016.3	43,472	1,636.1	326.3	402.0
Percent Change	-42.4%	-27.4%	-30.5%	-38.7%	-18.3%
By County, 2019					
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

PITTSBURGH & ITS COUNTRYSIDE

Total Impacts

Total Tourism Economy Impacts

(millions, except Employment (in units))

By County, 2020	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Allegheny	3,875.3	49,172	2,619.9	468.4	540.0
Armstrong	73.5	1,039	27.6	7.0	7.6
Beaver	237.1	3,286	112.2	24.7	27.6
Butler	429.0	5,377	202.3	43.3	47.5
Greene	62.5	747	20.5	5.7	6.0
Indiana	119.6	1,981	61.1	12.5	14.0
Lawrence	103.6	1,510	45.2	10.3	11.5
Washington	495.2	7,058	309.1	57.5	66.4
Pittsburgh and its Countryside	5,395.9	70,168	3,397.9	629.5	720.5
Percent Change	-41.7%	-23.1%	-24.8%	-31.0%	-27.4%
By County, 2019					
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	91,289.5	4,517.3	912.3	991.7

PENNSYLVANIA WILDS

Visitor spending summary, 2020

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

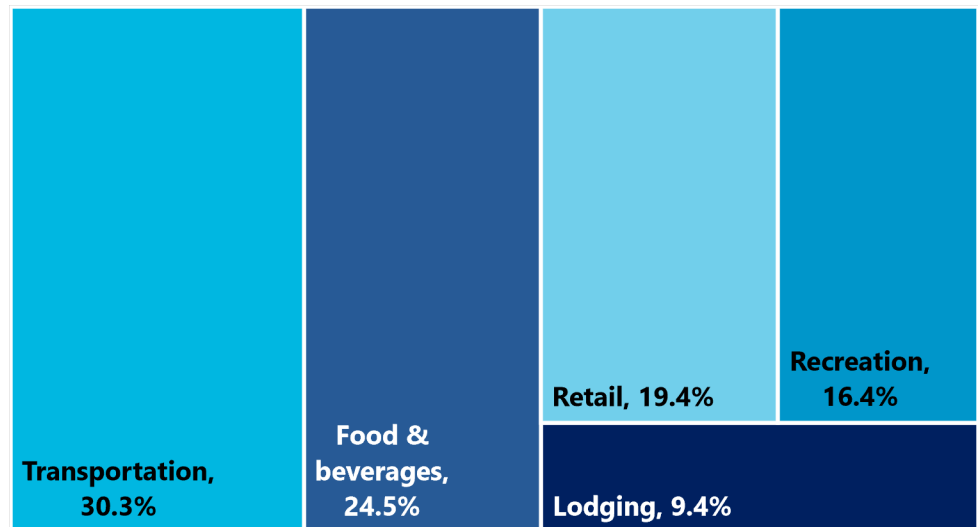
Travelers spent an estimated \$1.3 billion in the Pennsylvania Wilds region in 2020, a nearly 29% decrease from 2019 with traveler spending down by close to \$530 million— the lowest visitor spending level since 2009.

The region ranked 8th among the state's 11 tourism regions in total visitor spending, up from 9th in 2019, benefitting from its wealth of outdoor product and resulting in a less severe decline than experienced by some of the other Pa tourism regions.

Spending was down compared to 2019 for each major category with the largest declines in percentage terms seen in lodging (-37%), transportation (-34%), and recreation (-31%). The declines were less severe for food & beverage purchases (-24%) and shopping/retail (-18%). In dollar terms, transportation experienced the largest loss (-\$204 million) followed by food & beverage (-\$101 million), recreation (-\$98 million), lodging (-\$71 million), and shopping/retail (-\$54 million).

Traveler spending by category, 2020

Percent of region total



Source: Tourism Economics

PENNSYLVANIA WILDS

Travel and tourism impact on region's labor income and employment, 2020

The Pennsylvania Wilds region's travel and tourism industry suffered some of the largest pandemic-related employment losses of any industry but still managed to play a significant role in the region's economy due to its abundance of outdoor product.

The chart shows the travel and tourism economy's share of the region's total economy in terms of labor income and employment, which includes the direct, indirect, and induced impacts.

The travel and tourism industry directly supported 11,100 jobs in the region and close to 17,700 in total in 2020, with declines of 16% and 15%, respectively from the prior year.

The industry provided 7.5% of the labor income earned in the region – a 1.3 percentage point decline from 2019, and supported 10.1% of regional employment in 2020, down 0.9 percentage points from 2019 – the lowest of any region.

While the region ranked 9th in the total number of jobs supported by travel and tourism among Pennsylvania's 11 tourism regions, the region ranked 3rd for both employment intensity and labor income as a share of the region's total economy in 2020.

Travel and Tourism Share of Regional Economy, 2020



Source: Tourism Economics, BLS

PENNSYLVANIA WILDS

Timeline

Tourism Industry Spending

Amounts in millions of nominal dollars

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Cameron	\$7.8	\$9.0	\$9.5	\$9.6	\$9.6	\$9.4	\$9.7	\$10.1	\$10.1	\$10.0	\$10.4	\$8.8
Clarion	\$93.5	\$108.1	\$112.5	\$118.6	\$121.5	\$115.4	\$117.7	\$118.9	\$125.5	\$123.3	\$126.0	\$93.9
Clearfield	\$212.3	\$248.9	\$261.8	\$264.3	\$265.5	\$276.5	\$270.0	\$266.2	\$277.3	\$292.7	\$293.9	\$213.4
Clinton	\$108.0	\$136.6	\$151.4	\$153.9	\$150.6	\$147.5	\$147.7	\$140.6	\$149.9	\$152.4	\$160.0	\$104.5
Elk	\$47.2	\$52.3	\$61.4	\$66.1	\$66.0	\$69.3	\$74.7	\$78.0	\$80.2	\$79.2	\$82.5	\$62.1
Forest	\$18.5	\$20.4	\$23.7	\$22.6	\$23.4	\$23.2	\$27.0	\$26.3	\$27.2	\$27.1	\$26.1	\$29.7
Jefferson	\$82.2	\$102.9	\$109.9	\$113.6	\$115.1	\$115.1	\$119.1	\$116.0	\$124.1	\$121.9	\$120.8	\$81.7
Lycoming	\$269.3	\$308.7	\$384.4	\$398.2	\$405.9	\$391.4	\$382.5	\$370.6	\$379.3	\$392.1	\$408.9	\$282.1
McKean	\$123.2	\$158.9	\$164.0	\$173.4	\$174.5	\$174.8	\$174.6	\$172.9	\$180.0	\$183.4	\$182.6	\$121.0
Potter	\$27.0	\$30.1	\$36.6	\$34.3	\$34.5	\$35.4	\$38.8	\$37.7	\$40.2	\$38.9	\$39.4	\$38.8
Tioga	\$139.5	\$171.2	\$192.3	\$193.4	\$187.6	\$190.9	\$195.2	\$193.3	\$193.5	\$201.4	\$203.6	\$158.9
Warren	\$137.7	\$149.3	\$162.5	\$169.4	\$169.3	\$173.9	\$178.6	\$182.3	\$186.8	\$190.2	\$194.1	\$124.6
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	\$1,319.6
Percent Change		18.2%	11.6%	2.8%	0.4%	0.0%	0.7%	-1.3%	3.6%	2.2%	2.0%	-28.6%

Source: Tourism Economics

PENNSYLVANIA WILDS

Timeline

Tourism Industry Employment Impacts

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Cameron	73	74	75	75	76	76	76	77	77	78	80	75
Clarion	899	972	993	1,022	1,046	1,051	1,071	1,110	1,114	1,127	1,157	981
Clearfield	1,594	1,770	1,793	1,775	1,778	1,817	1,799	1,812	1,836	1,869	1,897	1,567
Clinton	798	952	990	993	1,040	1,045	1,064	1,069	1,073	1,090	1,128	929
Elk	462	488	509	531	554	557	573	591	596	601	622	535
Forest	124	135	136	137	137	138	138	139	139	140	142	148
Jefferson	683	747	762	785	804	807	821	816	828	839	846	700
Lycoming	2,538	2,707	2,790	2,901	2,973	2,961	2,952	2,930	2,951	2,989	3,032	2,430
McKean	943	1,112	1,130	1,114	1,138	1,144	1,164	1,166	1,197	1,203	1,216	1,026
Potter	195	206	216	229	241	242	246	245	253	257	257	254
Tioga	1,215	1,387	1,451	1,462	1,530	1,535	1,573	1,623	1,630	1,640	1,680	1,449
Warren	1,123	1,133	1,149	1,120	1,141	1,147	1,156	1,167	1,177	1,189	1,212	1,023
Pennsylvania Wilds	10,648	11,684	11,993	12,142	12,456	12,519	12,632	12,745	12,872	13,021	13,268	11,117
Percent Change		9.7%	2.6%	1.2%	2.6%	0.5%	0.9%	0.9%	1.0%	1.2%	1.9%	-16.2%

Source: Tourism Economics

PENNSYLVANIA WILDS

Visitor Spending

Tourism Direct Sales (millions)

By County, 2020	Lodging	Food & beverages	Retail	Recreation	Transportation	Total
Cameron	0.6	1.9	1.6	2.0	2.7	8.8
Clarion	9.6	23.2	20.8	15.6	24.7	93.9
Clearfield	18.5	51.0	43.3	34.2	66.4	213.4
Clinton	7.1	26.0	19.6	17.2	34.6	104.5
Elk	6.8	16.8	13.2	9.3	16.0	62.1
Forest	5.4	6.4	5.7	5.6	6.6	29.7
Jefferson	6.0	18.4	14.7	13.6	29.1	81.7
Lycoming	31.7	75.1	53.1	44.6	77.6	282.1
McKean	11.3	28.2	21.3	19.9	40.2	121.0
Potter	5.6	9.2	7.7	6.0	10.3	38.8
Tioga	17.3	38.8	29.7	27.0	46.1	158.9
Warren	4.1	28.0	25.2	21.2	46.1	124.6
Pennsylvania Wilds	124.0	323.1	255.8	216.3	400.4	1,319.6
Percent Change	-36.5%	-23.7%	-17.5%	-31.2%	-33.8%	-28.6%

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

Source: Tourism Economics

PENNSYLVANIA WILDS

TSA Categories

Tourism Satellite Account (millions)

By County, 2020	Visitor Spending	Government	Investment/ PCE	Total Tourism Demand
Cameron	8.8	0.0	0.9	9.7
Clarion	93.9	0.3	7.0	101.3
Clearfield	213.4	0.7	15.7	229.8
Clinton	104.5	0.3	8.0	112.8
Elk	62.1	0.3	4.8	67.2
Forest	29.7	0.1	3.0	32.9
Jefferson	81.7	0.3	6.2	88.2
Lycoming	282.1	1.2	20.4	303.7
McKean	121.0	0.5	8.9	130.4
Potter	38.8	0.2	3.6	42.7
Tioga	158.9	0.8	11.9	171.5
Warren	124.6	0.3	9.6	134.5
Pennsylvania Wilds	1,319.6	5.0	100.1	1,424.6
Percent Change	-28.6%	-21.8%	-6.4%	-27.4%

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

Source: Tourism Economics

PENNSYLVANIA WILDS

Direct Impacts

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

By County, 2020	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Cameron	8.8	75	1.5	0.4	0.5
Clarion	93.9	981	24.8	5.4	6.6
Clearfield	213.4	1,567	49.1	11.6	13.7
Clinton	104.5	929	23.7	5.7	6.7
Elk	62.1	535	12.6	3.3	3.7
Forest	29.7	148	4.1	1.4	1.5
Jefferson	81.7	700	19.5	4.5	5.4
Lycoming	282.1	2,430	73.0	16.4	19.5
McKean	121.0	1,026	29.3	6.8	8.0
Potter	38.8	254	6.3	2.0	2.1
Tioga	158.9	1,449	40.7	9.3	10.9
Warren	124.6	1,023	27.6	6.6	7.8
Pennsylvania Wilds	1,319.6	11,117	312.0	73.3	86.2
Percent Change	-28.6%	-16.2%	-16.1%	-24.1%	-1.3%

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

Source: Tourism Economics

PENNSYLVANIA WILDS

Total Impacts

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

By County, 2020	Visitor			Taxes	
	Spend	Employment	Labor Income	State/Local	Federal
Cameron	9.7	124	2.8	0.8	0.9
Clarion	101.3	1,558	50.0	10.5	11.8
Clearfield	229.8	2,561	94.5	22.5	24.7
Clinton	112.8	1,475	46.4	11.0	12.0
Elk	67.2	870	24.7	6.3	6.7
Forest	32.9	234	7.9	2.6	2.6
Jefferson	88.2	1,193	38.7	8.8	9.6
Lycoming	303.7	3,857	143.0	31.6	35.0
McKean	130.4	1,596	56.6	13.1	14.4
Potter	42.7	406	11.9	3.7	3.7
Tioga	171.5	2,179	74.8	17.8	19.6
Warren	134.5	1,616	53.9	12.9	14.1
Pennsylvania Wilds	1,424.6	17,669	605.1	141.7	155.1
Percent Change	-27.4%	-15.4%	-15.2%	-15.5%	-11.8%

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	20,882.3	713.3	167.7	175.7

Source: Tourism Economics

VALLEYS OF THE SUSQUEHANNA

Visitor spending summary, 2020

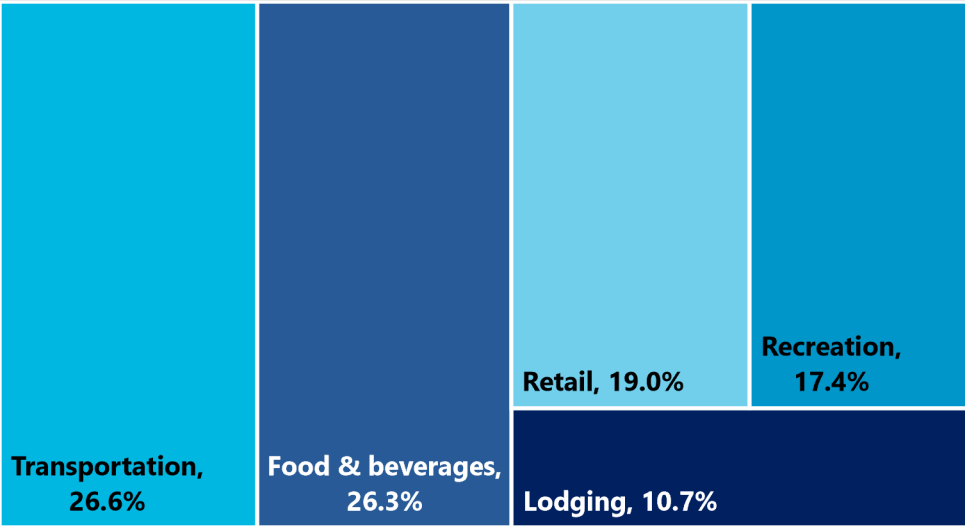
The Valleys of the Susquehanna region is comprised of Columbia, Montour, Northumberland, Snyder, and Union Counties.

Travelers spent an estimated \$483.5 million in the Valleys of the Susquehanna region in 2020, a 28% decrease from 2019 with traveler spending down by \$188 million – the lowest visitor spending level since 2009.

As in 2019, the region ranked 11th among the state’s 11 tourism regions in total visitor spending.

Spending was down for each major category with the largest declines in percentage terms seen in recreation (-37%), lodging (-37%), and transportation (-31%). The declines were less severe for food & beverage purchases (-22%) and shopping/retail (-14%) compared to 2019. In dollar terms, transportation experienced the largest loss (-\$56.8 million) followed by recreation (-\$49.2 million), food & beverage purchases (-\$36.7 million), and lodging (-\$30.1 million) with shopping/retail down by \$15.3 million.

Traveler spending by category, 2020
Percent of region total



Source: Tourism Economics

VALLEYS OF THE SUSQUEHANNA

Travel and tourism impact on region’s labor income and employment, 2020

The travel and tourism industry suffered some of the largest pandemic-related employment losses of any industry but still managed to play a significant role in the region’s economy.

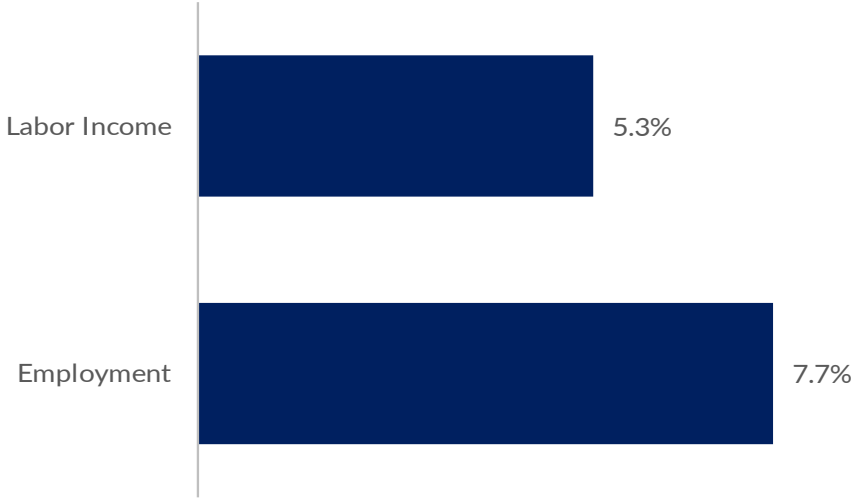
The chart shows the travel and tourism economy’s share of the region’s total economy in terms of labor income and employment, and includes the direct, indirect, and induced impacts.

The travel and tourism industry directly supported close to 4,450 jobs in the region and 7,340 in total in 2020, down by 21% and 19%, respectively, from the prior year.

The industry provided 5.3% of the labor income earned in the region – a 1.0 percentage point decline, and supported 7.7% of regional employment in 2020, down 1.2 percentage points from 2019.

While the region ranked 11th in the total number of jobs supported by travel and tourism among Pennsylvania’s 11 tourism regions, the region ranked 8th for employment intensity and 9th for labor income as a share of the region’s total economy in 2020.

Travel and Tourism Share of Regional Economy, 2020



Source: Tourism Economics, BLS

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	2020
Columbia	\$114.5	\$127.6	\$150.5	\$150.6	\$153.7	\$153.7	\$151.9	\$154.2	\$167.7	\$178.3	\$171.0	\$125.9
Montour	\$79.2	\$88.0	\$97.3	\$105.3	\$102.3	\$97.3	\$96.1	\$94.4	\$97.9	\$100.5	\$95.6	\$77.5
Northumberland	\$99.1	\$113.3	\$118.3	\$118.3	\$124.3	\$125.1	\$129.8	\$133.1	\$138.1	\$137.9	\$140.5	\$86.5
Snyder	\$74.9	\$83.5	\$90.6	\$90.2	\$95.3	\$98.8	\$99.3	\$103.5	\$111.6	\$111.4	\$110.9	\$81.0
Union	\$115.7	\$124.3	\$147.8	\$157.5	\$149.2	\$142.7	\$142.6	\$142.0	\$150.0	\$151.0	\$153.6	\$112.6
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	\$483.5
Percent Change		11.0%	12.7%	2.9%	0.4%	-1.1%	0.4%	1.2%	6.1%	2.0%	-1.1%	-28.0%

Tourism Industry Employment Impacts

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Columbia	1,141	1,171	1,217	1,258	1,291	1,290	1,292	1,302	1,339	1,369	1,364	1,079
Montour	800	823	839	863	884	889	902	926	937	965	973	808
Northumberland	943	988	1,013	1,050	1,066	1,078	1,101	1,107	1,128	1,129	1,152	849
Snyder	665	691	702	722	740	744	764	776	790	803	811	672
Union	1,098	1,126	1,152	1,188	1,224	1,229	1,216	1,243	1,271	1,293	1,314	1,035
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	4,443
Percent Change		3.3%	2.6%	3.2%	2.4%	0.5%	0.9%	1.5%	2.1%	1.7%	1.0%	-20.9%

Source: Tourism Economics

VALLEYS OF THE SUSQUEHANNA

Visitor Spending

Tourism Direct Sales (millions)

By County, 2020	Lodging	Food & beverages	Retail	Recreation	Transportation	Total
Columbia	14.6	33.7	23.6	19.8	34.2	125.9
Montour	10.8	19.6	14.2	13.8	19.0	77.5
Northumberland	2.7	19.7	13.3	21.8	29.0	86.5
Snyder	8.4	21.5	17.9	14.3	18.9	81.0
Union	15.1	32.5	22.9	14.5	27.5	112.6
Valleys of the Susquehanna	51.7	127.1	91.9	84.2	128.5	483.5
Percent Change	-36.8%	-22.4%	-14.2%	-36.9%	-30.6%	-28.0%
By County, 2019						
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

Source: Tourism Economics

VALLEYS OF THE SUSQUEHANNA

TSA Categories

Tourism Satellite Account (millions)

By County, 2020	Visitor Spending	Government	Investment/ PCE	Total Tourism Demand
Columbia	125.9	0.4	9.1	135.4
Montour	77.5	0.3	5.5	83.3
Northumberland	86.5	0.1	6.2	92.9
Snyder	81.0	0.3	5.8	87.1
Union	112.6	0.6	8.3	121.4
Valleys of the Susquehanna	483.5	1.8	34.8	520.1
Percent Change	-28.0%	-19.2%	-10.4%	-27.0%
<hr/>				
By County, 2019				
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

Source: Tourism Economics

VALLEYS OF THE SUSQUEHANNA

Direct Impacts

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

By County, 2020	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Columbia	125.9	1,079	27.7	6.7	7.9
Montour	77.5	808	20.5	4.6	5.4
Northumberland	86.5	849	26.6	5.2	6.7
Snyder	81.0	672	16.1	4.2	4.8
Union	112.6	1,035	28.8	6.6	7.7
Valleys of the Susquehanna	483.5	4,443	119.7	27.3	32.5
Percent Change	-28.0%	-20.9%	-19.8%	-24.7%	-3.4%
By County, 2019					
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

Source: Tourism Economics

VALLEYS OF THE SUSQUEHANNA

Total Impacts

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

By County, 2020	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Columbia	135.4	1,777	56.8	13.1	14.2
Montour	83.3	1,191	43.1	8.8	9.7
Northumberland	92.9	1,605	51.5	10.3	12.0
Snyder	87.1	1,107	33.7	8.1	8.6
Union	121.4	1,657	61.1	12.7	13.9
Valleys of the Susquehanna	520.1	7,337	246.3	52.9	58.4
Percent Change	-27.0%	-18.6%	-16.9%	-16.3%	-13.8%
By County, 2019					
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	9,014.0	296.3	63.2	67.7

Source: Tourism Economics

THE ALLEGHENIES

Visitor spending summary, 2020

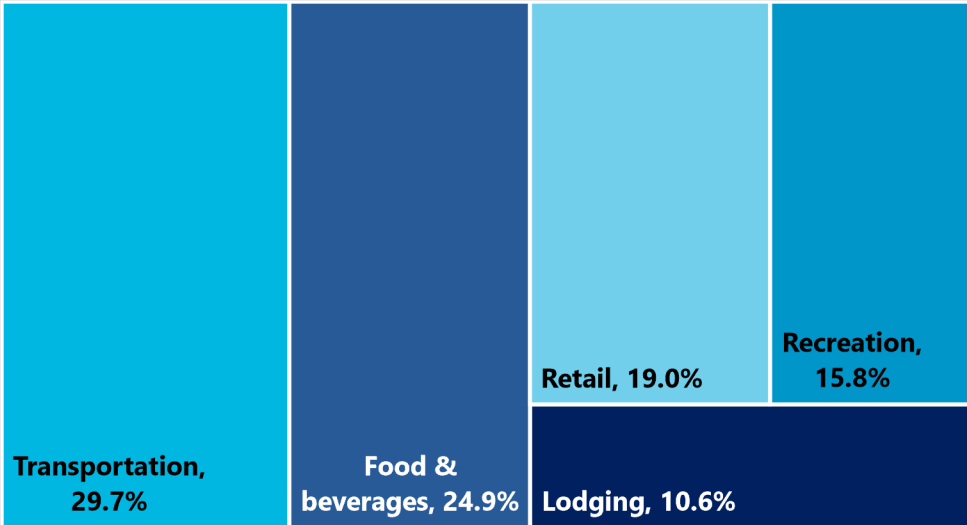
The Alleghenies region is comprised of Bedford, Blair, Cambria, Centre, Fulton, Huntingdon, Juniata, and Mifflin Counties.

Travelers spent an estimated \$1.4 billion in The Alleghenies region in 2020, a nearly 34% decrease from 2019 with traveler spending down by an estimated \$717 million- the lowest visitor spending level in well over a decade.

As in 2019, the region ranked 7th among the state's 11 tourism regions in total visitor spending.

Spending was down for each major category with the largest declines in percentage terms seen in lodging (-46%), transportation (-39%), and recreation (-36%). The declines were less severe for food & beverage purchases (-27%) and shopping/retail (-20%) compared to 2019. In dollar terms, transportation experienced the largest loss (-\$265 million) followed by food & beverage (-\$131 million), lodging (-\$127 million), recreation (-\$126 million), and shopping/retail (-\$68 million).

Traveler spending by category, 2020
Percent of region total



Source: Tourism Economics

THE ALLEGHENIES

Travel and tourism impact on region's labor income and employment, 2020

The travel and tourism industry suffered some of the largest pandemic-related employment losses of any industry but still managed to play a significant role in the region's economy.

The chart shows the travel and tourism economy's share of the region's total economy in terms of labor income and employment, and includes the direct, indirect, and induced impacts.

The travel and tourism industry directly supported more than 11,740 jobs in the region and 19,060 in total in 2020, down by 21% and 19%, respectively, from the prior year.

The industry provided 6.9% of the labor income earned in the region – a 1.7 percentage point decline from 2019, and supported 8.7% of regional employment in 2020, down 1.3 percentage points.

While the region ranked 8th in the total number of jobs supported by travel and tourism among Pennsylvania's 11 tourism regions, the region ranked 5th for employment intensity and 4th for labor income as a share of the region's total economy in 2020.

Travel and Tourism Share of Regional Economy, 2020



Source: Tourism Economics, BLS

THE ALLEGHENIES

Timeline

Tourism Industry Spending

Amounts in millions of nominal dollars

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Bedford	\$239.0	\$263.0	\$274.7	\$280.2	\$282.9	\$284.0	\$284.9	\$287.3	\$297.4	\$308.4	\$307.1	\$211.0
Blair	\$249.3	\$271.2	\$295.3	\$307.4	\$309.6	\$313.2	\$324.9	\$335.2	\$358.0	\$358.1	\$374.4	\$257.9
Cambria	\$238.5	\$257.6	\$290.5	\$303.4	\$301.0	\$303.2	\$308.1	\$310.9	\$315.8	\$316.4	\$310.7	\$205.1
Centre	\$545.6	\$588.7	\$649.3	\$654.3	\$694.1	\$720.4	\$741.8	\$748.5	\$794.2	\$809.1	\$823.4	\$495.5
Fulton	\$17.4	\$19.3	\$21.7	\$23.7	\$23.5	\$23.2	\$23.3	\$23.5	\$24.7	\$25.3	\$26.1	\$17.2
Huntingdon	\$129.1	\$144.1	\$153.1	\$162.8	\$161.7	\$160.4	\$163.9	\$166.5	\$173.0	\$176.6	\$178.6	\$143.2
Juniata	\$28.5	\$31.0	\$34.8	\$36.3	\$36.8	\$36.5	\$37.2	\$36.7	\$36.7	\$36.8	\$35.9	\$28.0
Mifflin	\$54.4	\$58.9	\$62.8	\$63.5	\$64.9	\$65.2	\$65.2	\$72.0	\$66.4	\$69.4	\$72.9	\$54.4
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	\$1,412.2
Percent Change		8.8%	9.1%	2.8%	2.3%	1.7%	2.3%	1.6%	4.3%	1.6%	1.4%	-33.7%

Tourism Industry Employment Impacts

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Bedford	1,977	2,026	2,015	1,967	1,978	2,004	2,042	2,054	2,080	2,174	2,172	1,639
Blair	2,446	2,499	2,544	2,554	2,609	2,588	2,665	2,758	2,796	2,779	2,841	2,298
Cambria	2,021	2,005	2,021	2,064	2,053	2,042	2,025	2,061	2,047	2,076	2,090	1,716
Centre	4,641	4,705	4,765	4,835	4,923	4,875	4,935	5,004	5,049	5,120	5,219	3,870
Fulton	143	152	152	154	155	156	158	161	167	174	177	135
Huntingdon	1,221	1,273	1,308	1,292	1,329	1,335	1,356	1,394	1,421	1,444	1,470	1,300
Juniata	239	218	219	222	223	224	226	231	232	233	230	203
Mifflin	567	583	589	598	605	608	618	641	651	663	688	585
The Alleghenies	13,254	13,460	13,614	13,687	13,876	13,833	14,024	14,306	14,443	14,665	14,888	11,744
Percent Change		1.6%	1.1%	0.5%	1.4%	-0.3%	1.4%	2.0%	1.0%	1.5%	1.5%	-21.1%

THE ALLEGHENIES

Visitor Spending

Tourism Direct Sales (millions)

By County, 2020	Lodging	Food & beverages	Retail	Recreation	Transportation	Total
Bedford	27.1	49.6	38.2	33.8	62.2	211.0
Blair	25.7	63.5	51.5	36.3	80.9	257.9
Cambria	14.0	49.0	39.0	35.3	67.8	205.1
Centre	63.4	126.9	96.0	76.0	133.2	495.5
Fulton	1.2	4.1	3.4	2.9	5.5	17.2
Huntingdon	13.0	35.4	25.2	26.3	43.4	143.2
Juniata	1.4	7.0	5.4	4.8	9.4	28.0
Mifflin	4.6	15.3	10.0	7.1	17.4	54.4
The Alleghenies	150.2	350.9	268.7	222.5	419.8	1,412.2
Percent Change	-45.7%	-27.2%	-20.1%	-36.2%	-38.7%	-33.7%
<hr/>						
By County, 2019						
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

Source: Tourism Economics

THE ALLEGHENIES

TSA Categories

Tourism Satellite Account (millions)

By County, 2020	Visitor Spending	Government	Investment/ PCE	Total Tourism Demand
Bedford	211.0	0.6	15.2	226.8
Blair	257.9	1.2	18.3	277.4
Cambria	205.1	0.7	14.6	220.4
Centre	495.5	1.7	36.3	533.5
Fulton	17.2	0.0	1.3	18.5
Huntingdon	143.2	0.5	10.7	154.4
Juniata	28.0	0.1	2.1	30.2
Mifflin	54.4	0.2	4.0	58.6
The Alleghenies	1,412.2	5.1	102.6	1,519.8
Percent Change	-33.7%	-24.0%	-16.8%	-32.7%
By County, 2019				
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

THE ALLEGHENIES

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

By County, 2020	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Bedford	211.0	1,639	43.1	10.9	12.7
Blair	257.9	2,298	70.6	15.4	18.4
Cambria	205.1	1,716	57.7	12.2	14.9
Centre	495.5	3,870	129.0	28.5	34.3
Fulton	17.2	135	3.4	0.9	1.0
Huntingdon	143.2	1,300	36.9	8.2	9.9
Juniata	28.0	203	4.9	1.4	1.5
Mifflin	54.4	585	15.1	3.2	3.9
The Alleghenies	1,412.2	11,744	360.6	80.6	96.7
Percent Change	-33.7%	-21.1%	-22.9%	-29.3%	-8.7%
By County, 2019					
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

THE ALLEGHENIES

Total Impacts

Total Tourism Economy Impacts

(millions, except Employment (in units))

By County, 2020	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Bedford	226.8	2,489	88.9	21.2	22.8
Blair	277.4	3,733	135.8	29.7	33.1
Cambria	220.4	2,963	108.9	23.7	26.8
Centre	533.5	6,194	269.6	55.3	61.7
Fulton	18.5	249	6.6	1.7	1.8
Huntingdon	154.4	1,991	68.8	16.0	17.7
Juniata	30.2	415	9.3	2.7	2.8
Mifflin	58.6	1,025	29.9	6.3	7.0
The Alleghenies	1,519.8	19,059	717.8	156.4	173.7
Percent Change	-32.7%	-18.8%	-20.4%	-21.4%	-18.5%
By County, 2019					
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	23,469.8	901.1	198.9	213.1

Source: Tourism Economics

DUTCH COUNTRY ROADS

Visitor spending summary, 2020

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

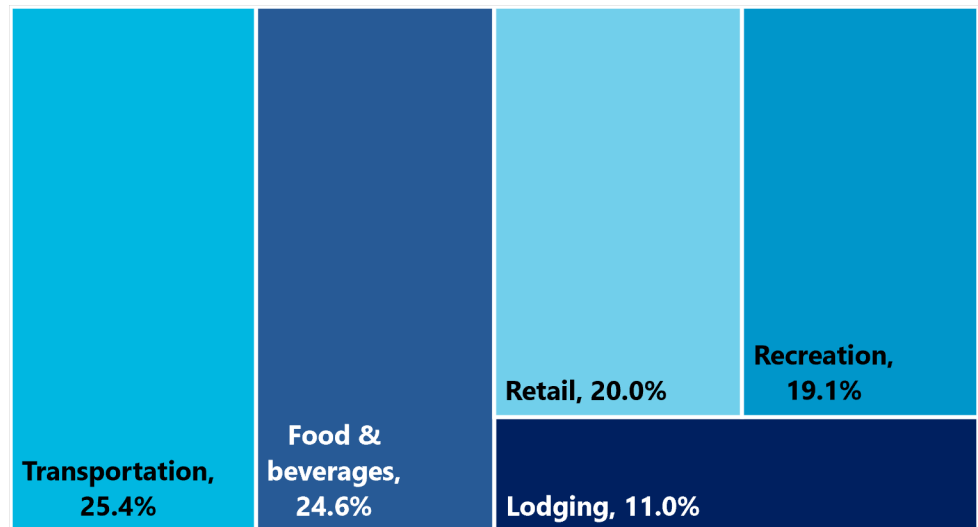
Travelers spent an estimated \$5.9 billion in the Dutch Country Roads region in 2020, a nearly 35% decrease from 2019 with traveler spending down by well over \$3.1 billion– the lowest visitor spending level in well over a decade.

In 2020, the region ranked 1st among the state's 11 tourism regions in total visitor spending – up from 2nd in 2019.

Spending was down for each major category with the largest declines in percentage terms seen in lodging (-48%), recreation (-39%), and transportation (-36%). The declines were less severe for food & beverage purchases (-28%) and shopping/retail (-24%) compared to 2019. In dollar terms, transportation experienced the largest loss (-\$867 million) followed by recreation (-\$717 million), lodging (-\$613 million), food & beverage (-\$578 million), and shopping/retail (-\$365 million).

Traveler spending by category, 2020

Percent of region total



Source: Tourism Economics

DUTCH COUNTRY ROADS

Travel and tourism impact on region's labor income and employment, 2020

The travel and tourism industry suffered some of the largest pandemic-related employment losses of any industry but still managed to play a significant role in the region's economy.

The chart shows the travel and tourism economy's share of the region's total economy in terms of labor income and employment, and includes the direct, indirect, and induced impacts.

The travel and tourism industry directly supported more than 52,860 jobs in the region and 84,490 in total in 2020, down by 23% and 20%, respectively, from the prior year.

The industry provided 6.4% of the labor income earned in the region – a 1.7 percentage point decline from 2019, and supported 8.4% of regional employment in 2020, down 1.4 percentage points.

While the region ranked 2nd in the total number of jobs supported by travel and tourism among Pennsylvania's 11 tourism regions, the region ranked 6th for employment intensity and 7th for labor income as a share of the region's total economy in 2020.

Travel and Tourism Share of Regional Economy, 2020



Source: Tourism Economics, BLS

DUTCH COUNTRY ROADS

Timeline

Tourism Industry Spending

Amounts in millions of nominal dollars

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Adams	\$520.9	\$555.8	\$608.0	\$628.8	\$671.8	\$666.0	\$686.7	\$691.2	\$725.9	\$735.0	\$750.7	\$480.5
Berks	\$623.7	\$687.7	\$762.7	\$794.8	\$807.3	\$795.9	\$824.4	\$857.0	\$901.9	\$930.7	\$950.1	\$661.5
Cumberland	\$628.3	\$677.8	\$726.7	\$749.8	\$760.3	\$774.1	\$816.6	\$838.7	\$881.8	\$892.8	\$897.2	\$617.5
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	\$1,475.3
Franklin	\$270.2	\$286.5	\$298.0	\$314.8	\$323.4	\$324.2	\$326.7	\$317.6	\$327.5	\$332.6	\$337.5	\$251.0
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	\$1,495.0
Lebanon	\$159.9	\$170.9	\$185.6	\$192.6	\$193.9	\$200.9	\$201.4	\$205.6	\$217.8	\$249.0	\$256.6	\$187.2
Perry	\$40.6	\$43.6	\$48.7	\$46.8	\$46.9	\$47.4	\$47.9	\$48.3	\$49.6	\$50.6	\$52.4	\$36.7
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	\$736.8
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	\$5,941.4
Percent Change		8.0%	8.0%	3.2%	2.7%	1.5%	2.4%	2.4%	4.4%	1.9%	2.2%	-34.6%

Source: Tourism Economics

DUTCH COUNTRY ROADS

Timeline

Tourism Industry Employment Impacts

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Adams	4,835	4,771	4,788	4,866	5,080	5,074	5,105	5,199	5,272	5,343	5,392	4,143
Berks	6,067	6,173	6,238	6,468	6,577	6,564	6,622	6,828	6,901	7,051	7,165	5,469
Cumberland	5,909	5,812	5,935	6,068	6,152	6,215	6,239	6,304	6,442	6,554	6,592	5,116
Dauphin	17,583	17,735	17,887	18,533	18,724	18,709	18,846	19,036	19,368	19,382	19,818	14,578
Franklin	2,298	2,276	2,288	2,352	2,438	2,438	2,444	2,513	2,533	2,583	2,632	2,148
Lancaster	14,381	14,640	14,753	15,239	15,478	15,731	15,853	16,310	16,554	16,747	17,145	13,151
Lebanon	1,544	1,534	1,562	1,609	1,654	1,667	1,655	1,695	1,714	1,759	1,807	1,441
Perry	296	302	310	321	327	328	340	347	346	345	346	304
York	7,213	7,038	7,165	7,421	7,525	7,637	7,709	7,913	8,010	8,046	8,108	6,512
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	52,863
Percent Change		0.3%	1.1%	3.2%	1.7%	0.6%	0.7%	2.1%	1.5%	1.0%	1.8%	-23.4%

Source: Tourism Economics

DUTCH COUNTRY ROADS

Visitor Spending

Tourism Direct Sales (millions)

By County, 2020	Lodging	Food & beverages	Retail	Recreation	Transportation	Total
Adams	48.1	107.8	98.4	110.2	116.0	480.5
Berks	60.4	167.7	136.3	109.9	187.2	661.5
Cumberland	71.9	165.2	119.6	105.7	155.1	617.5
Dauphin	187.0	335.2	263.8	334.4	354.9	1,475.3
Franklin	24.8	67.3	45.9	45.2	67.8	251.0
Lancaster	174.6	366.1	331.8	271.7	350.7	1,495.0
Lebanon	15.8	48.6	37.8	29.5	55.5	187.2
Perry	1.2	9.7	7.4	5.5	12.9	36.7
York	69.6	191.7	146.0	121.3	208.1	736.8
Dutch Country Roads	653.5	1,459.3	1,187.1	1,133.4	1,508.2	5,941.4
Percent Change	-48.4%	-28.4%	-23.5%	-38.8%	-36.5%	-34.6%
By County, 2019						
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

DUTCH COUNTRY ROADS

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

By County, 2020	Visitor Spending	Government	Investment/ PCE	Total Tourism Demand
Adams	480.5	1.9	34.0	516.5
Berks	661.5	2.6	46.7	710.8
Cumberland	617.5	2.0	43.6	663.1
Dauphin	1,475.3	8.1	104.0	1,587.4
Franklin	251.0	1.0	17.9	270.0
Lancaster	1,495.0	6.9	105.4	1,607.3
Lebanon	187.2	0.7	13.3	201.3
Perry	36.7	0.0	2.8	39.6
York	736.8	3.1	52.0	791.9
Dutch Country Roads	5,941.4	26.5	419.9	6,387.8
Percent Change	-34.6%	-36.7%	-20.1%	-33.8%
By County, 2019				
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

Source: Tourism Economics

DUTCH COUNTRY ROADS

Tourism Industry (direct) Impacts

Direct Impacts

(millions, except Employment (in units))

By County, 2020	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Adams	480.5	4,143	121.4	27.5	32.7
Berks	661.5	5,469	177.4	38.8	46.7
Cumberland	617.5	5,116	159.8	35.3	42.6
Dauphin	1,475.3	14,578	534.4	101.7	127.0
Franklin	251.0	2,148	61.5	14.2	16.7
Lancaster	1,495.0	13,151	403.8	89.0	106.0
Lebanon	187.2	1,441	45.7	10.6	12.5
Perry	36.7	304	7.1	1.8	2.1
York	736.8	6,512	201.6	43.8	52.7
Dutch Country Roads	5,941.4	52,863	1,712.7	362.6	439.0
Percent Change	-34.6%	-23.4%	-24.1%	-30.8%	-9.7%
By County, 2019					
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

DUTCH COUNTRY ROADS

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

By County, 2020	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Adams	516.5	6,471	246.9	53.2	58.7
Berks	710.8	9,553	362.8	75.1	83.8
Cumberland	663.1	8,109	330.0	68.6	76.6
Dauphin	1,587.4	21,597	1,091.3	196.0	227.4
Franklin	270.0	3,650	122.9	27.4	30.1
Lancaster	1,607.3	20,849	816.5	171.3	190.3
Lebanon	201.3	2,609	92.5	20.4	22.4
Perry	39.6	649	14.1	3.5	3.8
York	791.9	11,007	412.5	84.6	94.6
Dutch Country Roads	6,387.8	84,494	3,489.5	700.2	787.8
Percent Change	-33.8%	-20.2%	-20.2%	-22.7%	-19.6%
By County, 2019					
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	4,371.6	905.5	979.9

POCONO MOUNTAINS

Visitor spending summary, 2020

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

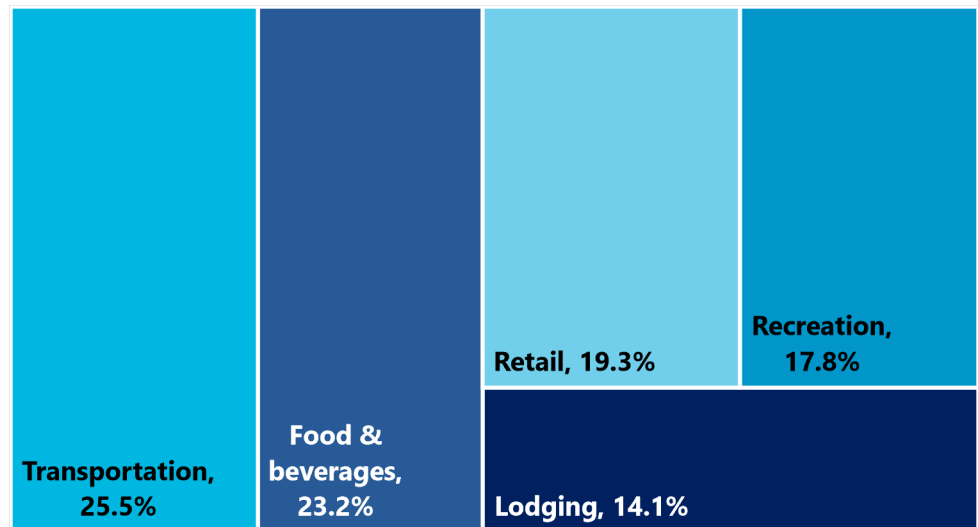
Travelers spent an estimated \$3.2 billion in the Pocono Mountains region in 2020, a 24% decrease from 2019 with traveler spending down by an estimated \$1.0 billion – the lowest visitor spending level in well over a decade.

As in 2019, the region ranked 4th among the state's 11 tourism regions in total visitor spending.

Spending was down for each major category with the largest declines in percentage terms seen in lodging (-33%), recreation (-29%), and transportation (-28%). The declines were less severe for food & beverage purchases (-17%) and shopping/retail (-13%) compared to 2019. In dollar terms, transportation experienced the largest loss (-\$318 million) followed by recreation (-\$229 million), lodging (-\$218 million), food & beverages (-\$150 million), and shopping/retail (-\$94 million).

Traveler spending by category, 2020

Percent of region total



Source: Tourism Economics

POCONO MOUNTAINS

Travel and tourism impact on region's labor income and employment, 2020

The travel and tourism industry suffered some of the largest pandemic-related employment losses of any industry but still managed to play a significant role in the region's economy.

The chart shows the travel and tourism economy's share of the region's total economy in terms of labor income and employment, and includes the direct, indirect, and induced impacts.

The travel and tourism industry directly supported 21,630 jobs in the region and 32,250 in total in 2020, down by 19% and 17%, respectively, from the prior year.

The industry provided 37.4% of the labor income earned in the region – a 6.1 percentage point decline, and supported 35.8% of regional employment in 2020, down 3.2 percentage points from 2019.

While the region ranked 4th in the total number of jobs supported by travel and tourism among Pennsylvania's 11 tourism regions, the region ranked 1st for both employment intensity and labor income as a share of the region's total economy in 2020.

Travel and Tourism Share of Regional Economy, 2020



Source: Tourism Economics, BLS

POCONO MOUNTAINS

Timeline

Tourism Industry Spending

Amounts in millions of nominal dollars

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Carbon	\$294.5	\$314.7	\$332.4	\$343.7	\$345.4	\$344.9	\$366.3	\$393.9	\$426.5	\$425.3	\$447.6	\$375.4
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	\$1,843.1
Pike	\$520.7	\$538.0	\$553.5	\$575.1	\$606.0	\$607.1	\$636.6	\$663.7	\$691.9	\$720.9	\$737.3	\$555.5
Wayne	\$400.4	\$422.4	\$432.7	\$429.5	\$424.2	\$419.7	\$433.1	\$443.8	\$462.3	\$478.9	\$517.1	\$428.1
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	\$3,202.2
Percent Change		7.3%	3.4%	3.0%	0.5%	0.2%	8.3%	9.7%	9.8%	2.5%	5.9%	-24.0%

Tourism Industry Employment Impacts

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Carbon	2,766	2,717	2,733	2,638	2,693	2,722	2,759	2,897	2,947	2,938	3,008	2,491
Monroe	12,780	12,937	13,011	12,847	12,912	12,890	13,411	14,051	14,488	14,464	14,749	11,564
Pike	5,257	4,856	4,852	4,760	4,853	4,922	5,084	5,229	5,322	5,457	5,574	4,682
Wayne	3,151	3,107	3,120	3,143	3,120	3,049	3,103	3,198	3,253	3,371	3,511	2,894
Pocono Mountains	23,954	23,617	23,717	23,388	23,579	23,582	24,358	25,375	26,011	26,231	26,842	21,632
Percent Change		-1.4%	0.4%	-1.4%	0.8%	0.0%	3.3%	4.2%	2.5%	0.8%	2.3%	-19.4%

Source: Tourism Economics

POCONO MOUNTAINS

Visitor Spending

Tourism Direct Sales (millions)

By County, 2020	Lodging	Food & beverages	Retail	Recreation	Transportation	Total
Carbon	54.0	87.9	55.0	77.2	101.4	375.4
Monroe	281.2	417.1	386.9	325.9	432.0	1,843.1
Pike	68.7	135.9	99.6	89.5	161.8	555.5
Wayne	48.9	102.9	75.2	78.8	122.3	428.1
Pocono Mountains	452.8	743.9	616.7	571.3	817.5	3,202.2
Percent Change	-32.5%	-16.7%	-13.3%	-28.6%	-28.0%	-24.0%
By County, 2019						
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

Source: Tourism Economics

POCONO MOUNTAINS

TSA Categories

Tourism Satellite Account (millions)

By County, 2020	Visitor Spending	Government	Investment/ PCE	Total Tourism Demand
Carbon	375.4	1.8	27.5	404.8
Monroe	1,843.1	7.7	135.3	1,986.1
Pike	555.5	1.9	44.0	601.4
Wayne	428.1	1.3	32.6	462.1
Pocono Mountains	3,202.2	12.8	239.4	3,454.5
Percent Change	-24.0%	-11.9%	-1.8%	-22.7%

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

Source: Tourism Economics

POCONO MOUNTAINS

Direct Impacts

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

By County, 2020	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Carbon	375.4	2,491	67.5	19.3	21.0
Monroe	1,843.1	11,564	452.7	104.7	123.2
Pike	555.5	4,682	162.0	33.5	41.4
Wayne	428.1	2,894	99.4	23.3	27.7
Pocono Mountains	3,202.2	21,632	781.6	180.9	213.2
Percent Change	-24.0%	-19.4%	-18.1%	-21.3%	0.0%
By County, 2019					
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

Source: Tourism Economics

POCONO MOUNTAINS

Total Impacts

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

By County, 2020	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Carbon	404.8	3,828	134.9	36.7	37.9
Monroe	1,986.1	17,343	907.8	201.9	221.5
Pike	601.4	6,721	325.4	65.3	74.2
Wayne	462.1	4,359	191.3	45.4	49.8
Pocono Mountains	3,454.5	32,251	1,559.3	349.2	383.4
Percent Change	-22.7%	-17.5%	-14.1%	-12.7%	-10.7%
By County, 2019					
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	39,082.2	1,814.4	399.8	429.5

Source: Tourism Economics

UPSTATE PA

Visitor spending summary, 2020

The Upstate PA region is comprised of Bradford, Lackawanna, Luzerne, Schuylkill, Sullivan, Susquehanna, and Wyoming Counties.

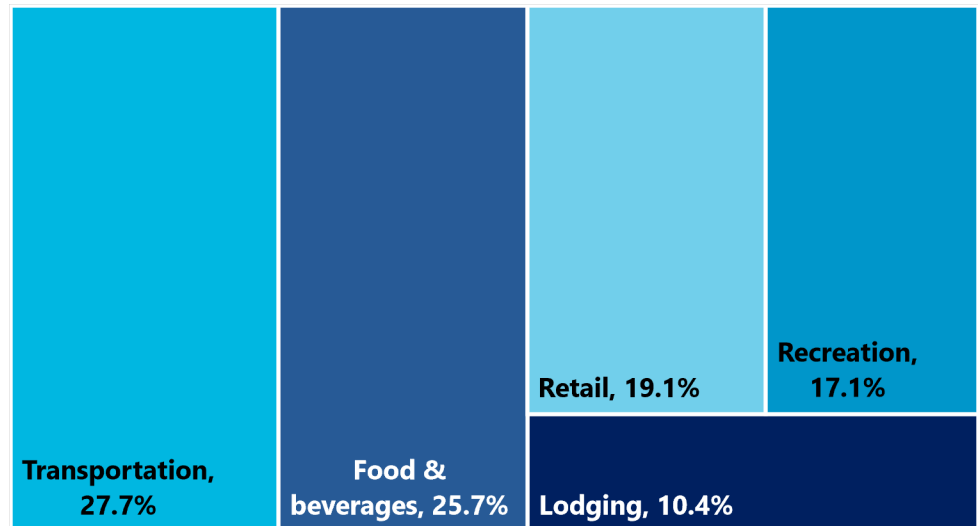
Travelers spent an estimated \$1.7 billion in the Upstate PA region in 2020, a nearly 29% decrease from 2019 with traveler spending down by an estimated \$692 million- the lowest amount of visitor spending level since 2009.

In 2020, the region ranked 5th among the state's 11 tourism regions in total visitor spending, up from 6th in 2019.

Spending was down for each major category with the largest declines in percentage terms seen in recreation (-37%), lodging (-37%), transportation (-31%). The declines were less severe for food & beverage purchases (-23%) and shopping/retail (-18%) compared to 2019. In dollar terms, transportation experienced the largest loss (-\$215 million) followed by recreation (-\$174 million), food & beverage purchases (-\$128 million), lodging (-\$105 million), and shopping/retail (-\$71 million).

Traveler spending by category, 2020

Percent of region total



Source: Tourism Economics

UPSTATE PA

Travel and tourism impact on region's labor income and employment, 2020

The travel and tourism industry suffered some of the largest pandemic-related employment losses of any industry but still managed to play a significant role in the region's economy.

The chart shows the travel and tourism economy's share of the region's total economy in terms of labor income and employment, and includes the direct, indirect, and induced impacts.

The travel and tourism industry directly supported an estimated 13,660 jobs in the region and 22,550 in total in 2020, down by 21 and 19%, respectively, from the prior year.

The industry provided 4.5% of the labor income earned in the region – a 1.3 percentage point decline from 2019 and supported 5.8% of regional employment in 2020, down 1.2 percentage points.

While the region ranked 5th in the total number of jobs supported by travel and tourism among Pennsylvania's 11 tourism regions, the region ranked 11th for both employment intensity and labor income as a share of the region's total economy in 2020.

Travel and Tourism Share of Regional Economy, 2020



Source: Tourism Economics, BLS

UPSTATE PA

Timeline

Tourism Industry Spending

Amounts in millions of nominal dollars

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Bradford	\$136.3	\$170.0	\$200.5	\$225.3	\$223.1	\$227.6	\$211.8	\$196.0	\$206.1	\$217.8	\$214.7	\$160.9
Lackawanna	\$483.1	\$536.5	\$615.5	\$632.1	\$648.4	\$633.3	\$618.4	\$605.8	\$649.9	\$667.2	\$689.1	\$483.9
Luzerne	\$708.3	\$795.5	\$870.3	\$870.2	\$859.9	\$875.1	\$889.7	\$914.2	\$965.3	\$989.0	\$1,015.7	\$685.0
Schuylkill	\$158.5	\$159.2	\$176.8	\$195.7	\$196.3	\$199.0	\$206.2	\$206.2	\$216.5	\$223.5	\$222.1	\$174.4
Sullivan	\$13.1	\$16.0	\$18.7	\$19.7	\$19.1	\$18.6	\$17.6	\$17.7	\$20.3	\$21.9	\$21.5	\$19.2
Susquehanna	\$122.7	\$141.6	\$151.8	\$164.3	\$163.1	\$161.6	\$157.1	\$153.4	\$157.4	\$163.0	\$168.4	\$125.8
Wyoming	\$36.8	\$41.3	\$53.1	\$61.2	\$64.1	\$63.5	\$61.2	\$51.6	\$60.0	\$63.8	\$65.4	\$55.0
UPSTATE PA	\$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	\$1,704.3
Percent Change		12.2%	12.2%	3.9%	0.3%	0.2%	-0.8%	-0.8%	6.1%	3.1%	2.2%	-28.9%

Tourism Industry Employment Impacts

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Bradford	1,037	1,252	1,326	1,333	1,402	1,410	1,408	1,378	1,395	1,434	1,469	1,280
Lackawanna	4,563	4,752	4,882	5,006	5,131	5,183	5,117	5,056	5,182	5,294	5,439	4,113
Luzerne	5,978	6,275	6,534	6,619	6,754	7,056	7,068	7,151	7,227	7,284	7,259	5,588
Schuylkill	1,187	1,165	1,177	1,203	1,219	1,225	1,221	1,253	1,267	1,287	1,304	1,157
Sullivan	117	138	148	160	173	174	167	172	175	183	183	165
Susquehanna	1,002	1,024	1,061	1,060	1,105	1,110	1,096	1,116	1,129	1,172	1,202	987
Wyoming	365	362	379	400	421	423	417	404	412	424	434	370
UPSTATE PA	14,250	14,967	15,507	15,781	16,205	16,580	16,494	16,528	16,787	17,078	17,291	13,659
Percent Change		5.0%	3.6%	1.8%	2.7%	2.3%	-0.5%	0.2%	1.6%	1.7%	1.2%	-21.0%

Source: Tourism Economics

UPSTATE PA

Visitor Spending

Tourism Direct Sales (millions)

By County, 2020	Lodging	Food & beverages	Retail	Recreation	Transportation	Total
Bradford	16.2	39.3	28.6	26.1	50.7	160.9
Lackawanna	52.4	129.7	104.2	84.6	113.0	483.9
Luzerne	74.9	176.6	125.1	116.4	192.1	685.0
Schuylkill	15.1	46.2	31.6	28.4	53.1	174.4
Sullivan	2.6	3.8	3.2	5.1	4.5	19.2
Susquehanna	8.8	29.9	21.2	22.3	43.6	125.8
Wyoming	7.4	12.5	12.1	8.3	14.7	55.0
UPSTATE PA	177.4	438.1	326.1	291.2	471.6	1,704.3
Percent Change	-37.1%	-22.6%	-18.0%	-37.4%	-31.3%	-28.9%
<hr/>						
By County, 2019						
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
UPSTATE PA	282.0	565.8	397.5	465.0	686.3	2,396.7

Source: Tourism Economics

UPSTATE PA

TSA Categories

Tourism Satellite Account (millions)

By County, 2020	Visitor Spending	Government	Investment/PCE	Total Tourism Demand
Bradford	160.9	0.5	11.9	173.3
Lackawanna	483.9	2.7	34.7	521.3
Luzerne	685.0	3.0	49.0	737.0
Schuylkill	174.4	0.7	12.5	187.6
Sullivan	19.2	0.1	1.9	21.2
Susquehanna	125.8	0.3	9.6	135.8
Wyoming	55.0	0.3	4.2	59.5
UPSTATE PA	1,704.3	7.7	123.8	1,835.8
Percent Change	-28.9%	-26.8%	-10.7%	-27.9%

By County, 2019	Visitor Spending	Government	Investment/PCE	Total
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
UPSTATE PA	2,396.7	10.5	138.7	2,545.9

Source: Tourism Economics

UPSTATE PA

Direct Impacts

Tourism Industry (direct) Impacts

(millions, except Employment (in units))

By County, 2020	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Bradford	160.9	1,280	37.7	8.8	10.4
Lackawanna	483.9	4,113	124.0	28.7	33.2
Luzerne	685.0	5,588	191.1	41.2	49.6
Schuylkill	174.4	1,157	40.9	9.7	11.3
Sullivan	19.2	165	4.1	1.0	1.2
Susquehanna	125.8	987	25.5	6.4	7.5
Wyoming	55.0	370	10.6	2.9	3.2
UPSTATE PA	1,704.3	13,659	433.9	98.8	116.4
Percent Change	-28.9%	-21.0%	-19.2%	-25.4%	-3.4%
By County, 2019					
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
UPSTATE PA	2,396.7	17,291	537.1	132.4	120.6

Source: Tourism Economics

UPSTATE PA

Total Impacts

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

By County, 2020	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Bradford	173.3	1,964	66.9	17.1	18.8
Lackawanna	521.3	6,650	252.2	54.7	59.6
Luzerne	737.0	9,285	401.2	79.5	89.0
Schuylkill	187.6	2,238	76.0	18.7	20.4
Sullivan	21.2	239	6.8	2.0	2.1
Susquehanna	135.8	1,568	47.2	12.6	13.5
Wyoming	59.5	605	21.2	5.6	5.8
UPSTATE PA	1,835.8	22,549	871.5	190.1	209.3
Percent Change	-27.9%	-18.7%	-16.5%	-16.9%	-13.8%
By County, 2019					
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
UPSTATE PA	2,545.9	27,747.6	1,044.3	228.7	242.8

Source: Tourism Economics

LEHIGH VALLEY

Visitor spending summary, 2020

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

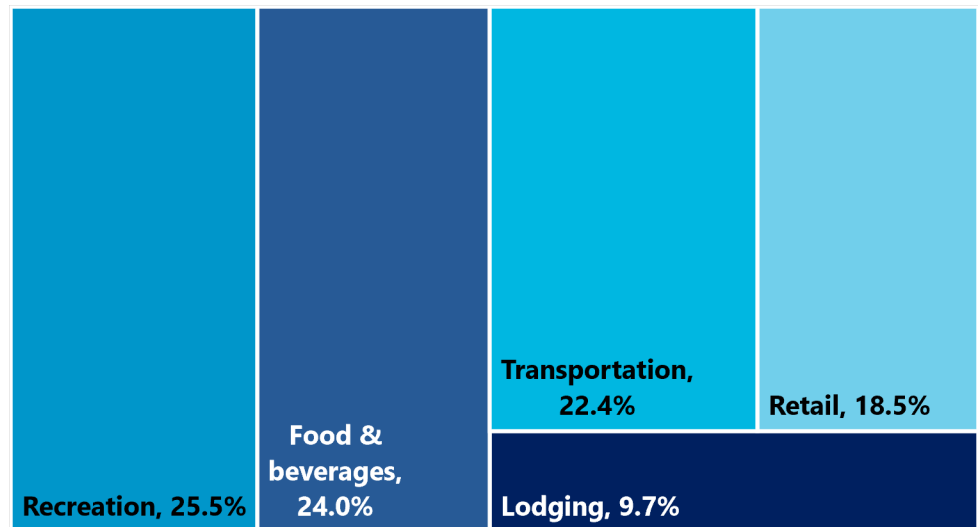
Travelers spent well over an estimated \$1.6 billion in the Lehigh Valley region in 2020, a nearly 33% decrease from 2019 with traveler spending down by \$800 million – the lowest visitor spending level in well over a decade.

In 2020, the region ranked 6th among the state's 11 tourism regions in total visitor spending, down from 5th in 2019.

Spending was down for each major category with the largest declines in percentage terms seen in recreation (-40%), lodging (-39%), and transportation (-37%). The declines were less severe for food & beverage purchases (-24%) and shopping/retail (-20%) compared to 2019. In dollar terms, recreation experienced the largest loss (-\$275 million) followed by transportation (-\$219 million), food & beverage (-\$216 million), lodging (-\$102 million), and shopping/retail (-\$78 million).

Traveler spending by category, 2020

Percent of region total



Source: Tourism Economics

LEHIGH VALLEY

Travel and tourism impact on region's labor income and employment, 2020

The travel and tourism industry suffered some of the largest pandemic-related employment losses of any industry but still managed to play a significant role in the region's economy.

The chart shows the travel and tourism economy's share of the region's total economy in terms of labor income and employment, and includes the direct, indirect, and induced impacts.

The travel and tourism industry directly supported 12,800 jobs in the region and 21,010 in total in 2020, down by 24% and 20%, respectively from the prior year.

The industry provided 6.5% of the labor income earned in the region – a 1.1 percentage point decline from 2019, and supported 7.2% of regional employment in 2020, down 1.2 percentage points.

While the region ranked 6th in the total number of jobs supported by travel and tourism among Pennsylvania's 11 tourism regions, the region ranked 9th for employment intensity and 5th for labor income as a share of the region's total economy in 2020.

Travel and Tourism Share of Regional Economy, 2020



Source: Tourism Economics, BLS

LEHIGH VALLEY

Timeline

Tourism Industry Spending

Amounts in millions of nominal dollars

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
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	\$919.8
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	\$728.0
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	\$1,647.8
Percent Change		9.4%	15.5%	5.7%	2.6%	3.7%	6.7%	4.3%	5.0%	2.8%	3.2%	-32.7%

Tourism Industry Employment Impacts

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Lehigh	7,732	7,555	7,624	7,838	7,970	7,983	8,119	8,356	8,590	8,667	8,844	6,715
Northampton	5,074	5,448	5,816	6,180	6,789	6,920	7,127	7,407	7,611	7,747	7,925	6,088
Lehigh Valley	12,806	13,003	13,440	14,018	14,760	14,903	15,246	15,764	16,201	16,414	16,769	12,803
Percent Change		1.5%	3.4%	4.3%	5.3%	1.0%	2.3%	3.4%	2.8%	1.3%	2.2%	-23.7%

Source: Tourism Economics

LEHIGH VALLEY

Visitor Spending

Tourism Direct Sales (millions)

By County, 2020	Lodging	Food & beverages	Retail	Recreation	Transportation	Total
Lehigh	94.4	238.7	197.1	165.1	224.5	919.8
Northampton	65.6	156.3	107.0	255.2	144.0	728.0
Lehigh Valley	160.0	395.0	304.1	420.3	368.5	1,647.8
Percent Change	-38.9%	-24.2%	-20.5%	-39.5%	-37.3%	-32.7%
By County, 2019						
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

Source: Tourism Economics

LEHIGH VALLEY

TSA Categories

Tourism Satellite Account (millions)

By County, 2020	Visitor Spending	Government	Investment/PCE	Tourism Demand	Total
Lehigh	919.8	3.3	65.0		988.1
Northampton	728.0	2.4	51.5		782.0
Lehigh Valley	1,647.8	5.8	116.5		1,770.1
Percent Change	-32.7%	-28.5%	-17.8%		-31.9%
By County, 2019					
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

Source: Tourism Economics

LEHIGH VALLEY

Direct Impacts

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

By County, 2020	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Lehigh	919.8	6,715	247.7	53.8	65.1
Northampton	728.0	6,088	268.5	49.1	63.5
Lehigh Valley	1,647.8	12,803	516.1	102.8	128.5
Percent Change	-32.7%	-23.7%	-21.6%	-27.9%	-6.7%
By County, 2019					
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

Source: Tourism Economics

LEHIGH VALLEY

Total Impacts

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

By County, 2020	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Lehigh	988.1	11,069	506.0	104.3	116.9
Northampton	782.0	9,943	581.7	96.1	113.6
Lehigh Valley	1,770.1	21,012	1,087.7	200.4	230.5
Percent Change	-31.9%	-20.2%	-15.4%	-19.6%	-17.0%
By County, 2019					
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	26,325.3	1,285.3	249.3	277.7

Source: Tourism Economics

PHILADELPHIA AND THE COUNTRYSIDE

Visitor spending summary, 2020

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

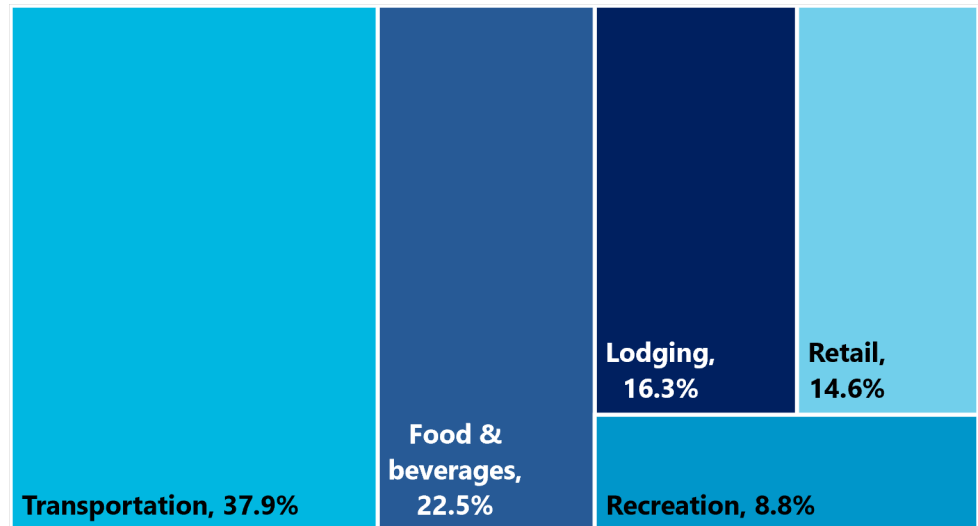
Travelers spent well over an estimated \$5.6 billion in the Philadelphia and The Countryside region in 2020, a nearly 50% decrease from 2019 with traveler spending down by close to \$5.3 billion – the largest decline in both percentage and dollar terms of the state’s tourism regions and the lowest visitor spending level in well over a decade

In 2020, the region ranked 2nd among the state’s 11 tourism regions in total visitor spending, down from 1st in 2019.

Spending was down for each major category with the largest declines in percentage terms seen in transportation (-55%) with air travel close to non-existent for many months, lodging (-53%), and recreation (-45%). The declines were slightly less severe for food & beverage purchases (-39%) and shopping/retail (-32%) compared to 2019. In dollar terms, transportation experienced the largest loss (-\$2.7 billion) followed by lodging (-\$1.0 billion), food & beverage (-\$799 million), recreation (-\$411 million), and shopping/retail (-\$392 million).

Traveler spending by category, 2020

Percent of region total



Source: Tourism Economics

PHILADELPHIA & THE COUNTRYSIDE

Travel and tourism impact on region's labor income and employment, 2020

The travel and tourism industry suffered some of the largest pandemic-related employment losses of any industry but still managed to play a significant role in the region's economy.

The chart shows the travel and tourism economy's share of the region's total economy in terms of labor income and employment, and includes the direct, indirect, and induced impacts.

The travel and tourism industry directly supported more than 55,680 jobs in the region and 101,020 in total in 2020, down by 30% and 24%, respectively, from the prior year.

The industry provided 4.5% of the labor income earned in the region – a 1.3 percentage point decline from 2019, and supported 5.8% of regional employment in 2020, down 1.2 percentage points.

While the region ranked 1st in the total number of jobs supported by travel and tourism among Pennsylvania's 11 tourism regions, the region ranked 10th for both employment intensity and labor income as a share of the region's total economy in 2020.

Travel and Tourism Share of Regional Economy, 2020



Source: Tourism Economics, BLS

PHILADELPHIA & THE COUNTRYSIDE

Traveler Spending and Travel Industry Employment, 2019 and 2020

Traveler Spending, 2009-2020

Amounts in millions of nominal dollars

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Bucks	\$629.2	\$673.2	\$728.0	\$743.6	\$742.1	\$760.4	\$795.5	\$813.9	\$831.7	\$877.2	\$913.8	\$669.3
Chester	\$608.2	\$646.7	\$684.2	\$713.8	\$730.4	\$736.2	\$760.1	\$772.6	\$800.2	\$847.2	\$865.2	\$510.3
Delaware	\$530.4	\$564.5	\$654.5	\$645.8	\$642.1	\$655.6	\$658.6	\$667.9	\$692.4	\$747.7	\$770.0	\$544.5
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	\$847.5
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	\$3,053.0
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	\$5,624.6
Percent Change		6.4%	6.7%	2.1%	2.7%	1.9%	2.8%	3.3%	3.3%	5.4%	3.3%	-48.4%

Travel Industry Employment Impacts, 2009-2020

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Bucks	8,482	8,389	8,568	8,717	8,776	8,850	8,999	9,161	9,235	9,418	9,614	7,450
Chester	6,983	6,823	6,879	7,052	7,176	7,288	7,397	7,499	7,679	7,845	8,015	5,854
Delaware	6,701	6,697	6,936	7,158	7,360	7,486	7,535	7,696	7,850	8,006	8,149	6,163
Montgomery	12,380	12,159	12,337	13,008	13,366	13,430	13,618	13,965	14,147	14,318	14,636	10,737
Philadelphia	31,929	32,221	32,669	33,628	34,415	34,803	35,577	36,361	37,046	37,953	38,748	25,479
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	55,684
Percent Change		-0.3%	1.7%	3.2%	2.2%	1.1%	1.8%	2.1%	1.7%	2.1%	2.1%	-29.7%

Source: Tourism Economics

PHILADELPHIA & THE COUNTRYSIDE

Traveler Spending by Category, 2019 and 2020

Traveler Spending by Category, 2019 and 2020

(in \$millions)

By County, 2020	Lodging	Food & beverages	Retail	Recreation	Transportation	Total
Bucks	123.9	165.3	107.4	65.0	207.7	669.3
Chester	80.1	133.0	93.0	61.7	142.6	510.3
Delaware	91.6	135.9	89.3	53.9	173.7	544.5
Montgomery	181.0	193.2	129.0	65.0	279.3	847.5
Philadelphia	437.9	635.5	401.0	250.3	1,328.2	3,053.0
Philadelphia & The Countryside	914.5	1,262.9	819.7	496.0	2,131.5	5,624.6
Percent Change	-52.6%	-38.7%	-32.3%	-45.3%	-55.4%	-48.4%
By County, 2019						
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

Source: Tourism Economics

PHILADELPHIA & THE COUNTRYSIDE

Tourism Satellite Account (TSA) Measures, 2019 and 2020

Tourism Satellite Account

(in \$millions)

By County, 2020	Visitor Spending	Government	Investment/ PCE	Total Tourism Demand
Bucks	669.3	4.8	47.4	721.6
Chester	510.3	2.9	36.2	549.4
Delaware	544.5	2.6	38.5	585.5
Montgomery	847.5	5.2	60.0	912.7
Philadelphia	3,053.0	30.4	216.0	3,299.4
Philadelphia & The Countryside	5,624.6	45.9	398.1	6,068.6
Percent Change	-48.4%	-58.0%	-36.9%	-47.8%

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

Source: Tourism Economics

PHILADELPHIA & THE COUNTRYSIDE

Total Travel & Tourism Industry Impacts, 2019 and 2020

Travel and Tourism Industry (direct) Impacts, 2019 and 2020

(in \$millions, except Employment (in units))

By County, 2020	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Bucks	669.3	7,450	266.8	49.5	61.7
Chester	510.3	5,854	220.4	38.6	49.8
Delaware	544.5	6,163	265.8	43.5	58.2
Montgomery	847.5	10,737	417.1	69.2	91.2
Philadelphia	3,053.0	25,479	1,451.5	256.2	319.9
Philadelphia & The Countryside	5,624.6	55,684	2,621.6	457.0	580.8
Percent Change	-48.4%	-29.7%	-31.6%	-42.2%	-20.8%
By County, 2019					
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

Source: Tourism Economics

PHILADELPHIA & THE COUNTRYSIDE

Total Travel & Tourism Economy Impacts, 2019 and 2020

Total Travel & Tourism Economy Impacts, 2019 and 2020

(in \$millions, except Employment (in units))

By County, 2020	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	Federal
Bucks	721.6	13,734	543.4	94.6	110.3
Chester	549.4	10,928	456.3	74.6	89.0
Delaware	585.5	11,440	524.5	84.8	103.9
Montgomery	912.7	19,625	881.7	133.9	162.7
Philadelphia	3,299.4	45,296	3,159.3	484.5	571.2
Philadelphia & The Countryside	6,068.6	101,024	5,565.2	872.5	1,037.1
Percent Change	-47.8%	-23.6%	-24.0%	-34.6%	-30.0%
By County, 2019					
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

Source: Tourism Economics

APPENDIX

GLOSSARY – SPENDING

Term	Description
Lodging	Includes visitor spending in the accommodation sub-sector. This includes food and other services provided by hotels and similar establishments.
Food and beverage	Includes all visitor spending on food & beverages, including at restaurants, bars, grocery stores and other food providers.
Recreation	Includes visitors spending within the arts, entertainment and recreation sub-sector.
Shopping	Includes visitor spending in all retail sub-sectors within the local economy.
Local transport	Includes visitor spending on local transport services such as taxis, limos, trains, rental cars, and buses.

GLOSSARY – IMPACTS

Term	Description
Direct Impact	Impacts (business sales, jobs, income, and taxes) created directly from spending by visitors to a destination within a discreet group of tourism-related sectors (e.g. recreation, transportation, lodging).
Indirect Impact	Impacts created from purchase of goods and services used as inputs (e.g. food wholesalers, utilities, business services) into production by the directly affected tourism-related sectors (i.e. economic effects stemming from business-to-business purchases in the supply chain).
Induced Impact	Impacts created from spending in the local economy by employees whose wages are generated either directly or indirectly by visitor spending.
Employment	Jobs directly and indirectly supported by visitor activity (includes part-time and seasonal work). One job is defined as one person working at least one hour per week for fifty weeks during the calendar year.
Personal Income	Income (wages, salaries, proprietor income and benefits) supported by visitor spending.
Value Added (GDP)	The economic enhancement a company gives its products or services before offering them to customers.
Local Taxes	City and County taxes generated by visitor spending. This includes any local sales, income, bed, usage fees, licenses and other revenues streams of local governmental authorities – from transportation to sanitation to general government.
State Taxes	State tax revenues generated by visitor spending. This will include sales, income, corporate, usage fees and other assessments of state governments.

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.

For more information:

info@tourismeconomics.com