

# The Economic Impact of Travel in Pennsylvania

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Tourism Satellite Account  
Calendar Year 2018



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# Key Definitions

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1. **Tourism/Tourist:** Refers to the leisure travel/traveler segment.
2. **Travel/Traveler:** Includes both leisure and business travel/travelers.
3. **Travel and Tourism Industry:** The value of traveler activity within “travel characteristic industries.” This concept measures only the direct impact of the travel industry from the sales made to travelers.
4. **Travel and Tourism Economy:** The value of traveler activity plus government spending and capital investment in support of travel and tourism and certain personal consumption expenditures. This is the basis of the total economic impact analysis, including the direct impact and the downstream indirect and induced impacts.
5. **Visitor (or Traveler) Spending:** Estimates of the dollars travelers spent on their trip, derived from the self-reported expenditures on a national survey of U.S. travelers. The state level data also includes estimates of the spending by international travelers from Canada and overseas markets in the total(s).
6. **Direct Sales:** The term used to portray visitor spending for the major categories of travel-related expenditures and equates to visitor/traveler spending.

# Key Definitions

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7. **Economic Impact:** Analysis that traces the flows of spending associated with travel activity within a specific geographic area to identify changes in sales, tax revenues, income and jobs derived from travelers.
8. **Direct Impact:** The economic impact – including jobs and income – from the initial sales made by travelers. Examples include sales made by travelers at lodging properties, souvenir shops, restaurants, gas stations, amusement parks, museums, etc.
9. **Indirect Impact:** The economic impact from the production, employment, and income occurring in other businesses/industries that supply the businesses making initial/direct sales to travelers. Examples of indirect impact include a restaurant's food supplier or a hotel's laundry service.
10. **Induced Impact:** The economic impact from the spending by households in the local economy as the result of the earnings from a business that directly or indirectly interacts with travelers. Examples include hotel desk clerks who use their wages to pay for their groceries and the accountants who work for companies that supply napkins and other goods to a restaurant frequented by travelers and who use their wages to purchase flowers from the local florist.

# Key Definitions

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- 11. Jobs/Employment:** Estimates of the number of jobs – both full-time and part-time – supported by travel and tourism, reflecting the annual average number of monthly jobs supported by travel and tourism throughout the year and includes wage and salary jobs, sole proprietorships, and individual general partners, but not unpaid family workers or volunteers. Note: The jobs estimates are not on a full-time-equivalent basis.
- 12. Labor Income:** Estimates of Employee Compensation (i.e., wages and benefits) and Proprietor Income including the profits realized by business owners derived from businesses supported by Pennsylvania’s travel and tourism industry.
- 13. Transportation:** Estimates of traveler spending on transportation are derived from the self-reported spending of travelers on surveys by Longwoods International. This spending may include purchases of gasoline and airline, bus, or train tickets, as well as costs for parking, tolls, car repairs while traveling, etc.

# Key Definitions – Spending Categories

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<b>Spending Category</b>	<b>Description</b>
Lodging	Includes traveler spending in the accommodations sector and includes food and other services provided by hotels and similar establishments.
Recreation	Includes all traveler spending within the arts, entertainment and recreation sector.
Air transportation	Includes the local economic activity generated by travelers within the air transport (airline) and support services (on airport) sectors.
Other transport	Includes all forms of local transportation services, e.g., taxis, limos, trains, rental cars, and buses.
Shopping	Includes traveler spending within all retail sectors.
Service stations	Traveler spending on gasoline, with just the margin included for the local economic impact.
Second homes	Spending associated with the operation of seasonal second homes for recreational use, as defined by the U.S. Census Bureau and based on an “imputed rent” calculation over an estimated peak season.
Food and beverage	Includes all traveler spending at restaurants and bars.

# State Overview



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The number of travelers and travel-related spending rose in 2018 as economic conditions continued to help spur travel to/within Pennsylvania.

## Key facts about Pennsylvania's travel industry

The total number of domestic + international travelers reached a record high 208.1 million in 2018.

Total traveler spending rose 4.1% in 2018 to \$44.8 billion.

Traveler spending continued to support 6.6% of all jobs in PA.

Travel and tourism generated \$4.6 billion in PA state and local taxes in 2018.

## Key travel industry impacts in Pennsylvania, 2018

Dollar amounts in billions

<b>Traveler spending</b>	<b>\$44.788</b>
<b>Total jobs supported by travel industry</b>	<b>515,072</b>
<b>Jobs directly supported by travel</b>	<b>329,565</b>
<b>Income supported by travel industry</b>	<b>\$22.877</b>
<b>Taxes generated by travel industry</b>	<b>\$9.658</b>
Federal	\$5.013
State	\$2.495
Local	\$2.150

Source: Tourism Economics



# State Overview

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- Spending by Pennsylvania travelers and tourists grew to \$44.8 billion in 2018 – the ninth consecutive year of growth. *(Note: Total traveler spending is also presented in the report as “travel & tourism industry sales.”)*
- Traveler spending grew 4.1% in 2018 – just a fraction below 2017’s growth rate of 4.2% and well above the 1.8% pace seen in 2016.
  - An estimated 208.1 million visitors traveled to and/or within Pennsylvania in 2018, a 1.8% increase from the 204.4 million in 2017. *(Note: The visitor count includes those from the leisure and business travel segments and from the domestic and international markets, measured in “person-trips.”)*
  - The increase in the number of U.S. travelers as well as an increase in per traveler per trip spending contributed to the increase in total traveler spending in 2018.
  - The generally low inflation environment and the strong economy, especially in terms of job growth and job security, were underlying factors for 2018’s strong increase in traveler spending.
- Spending by travelers and travel-related businesses generated an estimated \$77.2 billion in total economic activity (including indirect and induced impacts) as measured by business sales throughout all industries in Pennsylvania in 2018.

# Key Impacts

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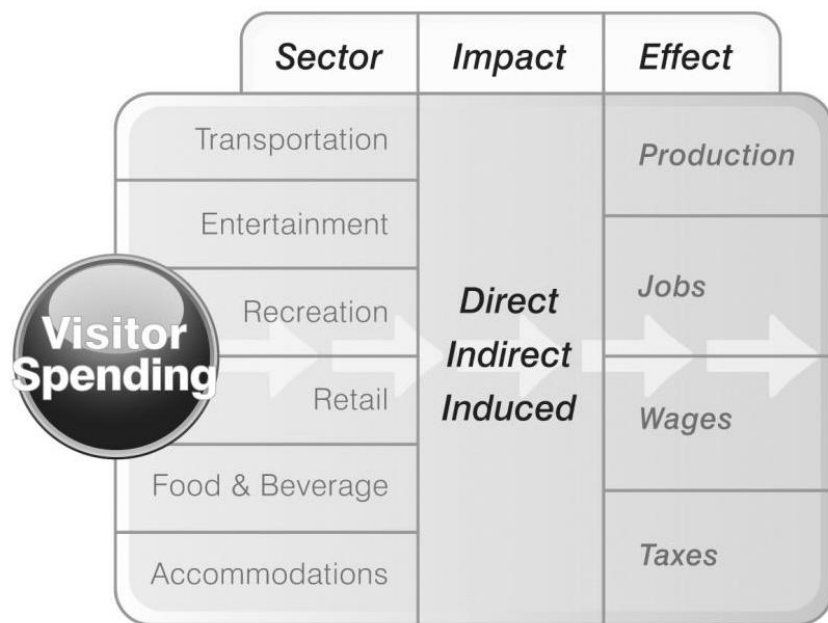
- Travel and tourism-related economic activity supported an estimated 515,100 PA jobs in total (*i.e., includes direct, indirect and induced jobs*) in 2018 – a 1.2% increase from 2017 and representing 6.6% of the state’s total employment.
- The 1.2% growth rate for Pennsylvania’s travel-related (direct) and travel-supported (indirect and induced) jobs in 2018 was just slightly above the rate of increase for all non-farm jobs in the state.
- The state’s travel and tourism sector was directly responsible for an estimated \$18.5 billion of the state’s 2018 Gross Domestic Product (GDP) – a 3.2% increase from 2017 and representing 2.4% of the state’s total GDP.
- Including indirect and induced impacts, PA’s travel and tourism industry generated \$4.6 billion in state & local taxes and \$5.0 billion in federal taxes in 2018.

Spending from every  
404 travelers supports  
one PA job

PA’s travel and tourism  
industry supports one out of  
every 15 PA workers

# How travel and tourism generates impact

## How traveler spending generates economic impact and benefits



Tourism spending flows through the economy and generates economic benefit through multiple channels.

The analysis of the travel and tourism industry's impact on Pennsylvania's economy starts with actual spending by travelers and the downstream effects of this injection of spending into the local economy. To determine the total economic impact of travel and tourism in Pennsylvania, the estimated amount of total traveler spending is input into a model of the state's economy created in IMPLAN. This model calculates three distinct types of impact: direct, indirect, and induced.

- Traveler spending creates an amount of **direct** economic value within a discreet group of sectors (e.g. recreation, lodging, transportation, etc.). This spending supports a number of jobs, wages, taxes, and GDP within each sector.
- Each business with a direct interaction with travelers purchases goods and services from other types of businesses (e.g., food wholesalers, utilities, landscapers, banks, etc.) that do not have a direct interaction with travelers, but benefit from traveler spending nevertheless. These impacts are called **indirect** impacts.
- Lastly, the **induced** impact is generated when employees whose wages are generated, either directly or indirectly, by travel and tourism spend those wages in the local economy.

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

# Spending Impacts



Travelers spend their \$\$ at a wide variety of businesses, including museums, restaurants, lodging facilities, events and attractions, gas stations, airports, retail shops, travel agents, and many others. This is the **direct impact**.

## Businesses Directly Interacting With Travelers



The businesses that directly interact with travelers purchase a wide variety of goods and services from suppliers, manufacturers, and service companies. This is the **indirect impact**.

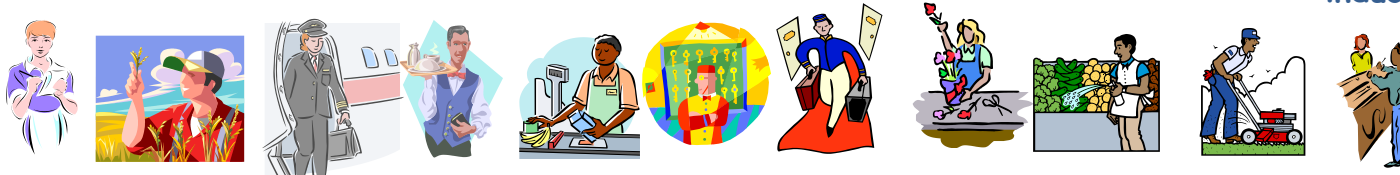
Wages paid to employees



## Manufacturers, Supplier and Support Businesses



The employees of businesses directly interacting with travelers and their suppliers whose wages are either direct or indirectly derived from traveler spending, in turn spend their wages at local businesses. This is the **induced impact**.



# Detailed State Results

**Total U.S. & International Traveler Spending**  
**Key Trends**  
**Travel Segments**  
**Spending Categories**



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# Key Travel Trends in 2018

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- Travel and tourism continued to be an integral part of Pennsylvania's economy in 2018, with traveler spending (*aka, "industry sales"*) directly injecting \$44.8 billion into the state's economy – a 4.1% increase from 2017 and new record high.
- The 4.1% increase in total spending was derived from both the leisure and business travel segments with both contributing to 2018's strong growth in traveler spending.
- In percentage terms, the increase in spending by the business travel segment was especially strong, growing by 6.0% from 2017 compared to the 3.7% growth rate in leisure travel spending.
- Spending increases were strong with all industry sectors – from lodging and food and beverages (5.6% and 5.7%, respectively) to shopping/retail (2.1%) to total transportation (4.4%) – posting strong gains from 2017.
- When measured in dollar terms, the leisure overnight travel segment had the largest increase (~ \$1 billion) by far of the four major travel segments, but the business overnight segment far outpaced that of leisure overnight with the increase measured in percentage terms (6.1% vs 4.3%).

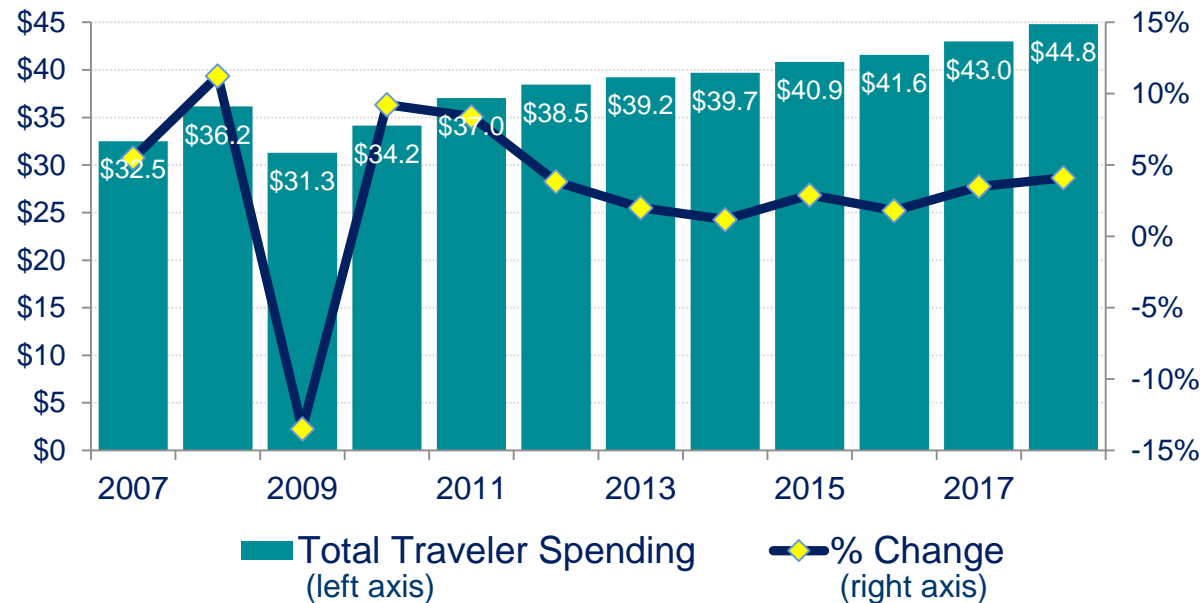


# Traveler Spending in PA Reached New Record High in 2018

- Total spending by U.S. and international travelers and tourists in Pennsylvania reached a record high \$44.8 billion in 2018 – the ninth straight year with an increase in total traveler spending (includes spending by both business and leisure travelers, overnight and day-trip).
- Spending was up 4.1% from 2017 with all travel segments (i.e., leisure and business, overnight and day-trips) contributing to the increase.

## Total traveler spending in Pennsylvania

(in billions of U.S. dollars)



*Includes spending by both domestic and international travelers and business and leisure travel segments.*

*Source: Tourism Economics*

# PA 2018 Traveler Spending by Market Segment

- For the second year in a row, the rate of growth in spending by PA's business travel segment outpaced that of the leisure segment by a significant margin in 2018.
- Overnight travelers outspent day-trip travelers by \$12.6 billion in 2018, or by a factor of \$1.78 to \$1.00 – up slightly from the \$1.75 ratio seen in both 2016 and 2017.

2018 Traveler Spending* by Segment (in billions of U.S. dollars)					
Purpose		Stay		Market	
Leisure	\$37.4	Overnight	\$28.7	U.S. Domestic	\$41.9
Business	\$ 7.4	Day-trip	\$16.1	Overseas	\$ 2.6
				Canada	\$ 0.3
<b>Total</b>	<b>\$44.8</b>	<b>Total</b>	<b>\$44.8</b>	<b>Total</b>	<b>\$44.8</b>
Growth Rate					
Leisure	3.7%	Overnight	4.7%	U.S. Domestic	4.4%
Business	6.0%	Day-trip	3.0%	Overseas	0.1%
<b>Total</b>	<b>4.1%</b>	<b>Total</b>	<b>4.1%</b>	Canada	-2.7%
Market Share					
Leisure	83.5%	Overnight	64.0%	U.S. Domestic	93.6%
Business	16.5%	Day-trip	36.0%	Overseas	5.8%
				Canada	0.6%

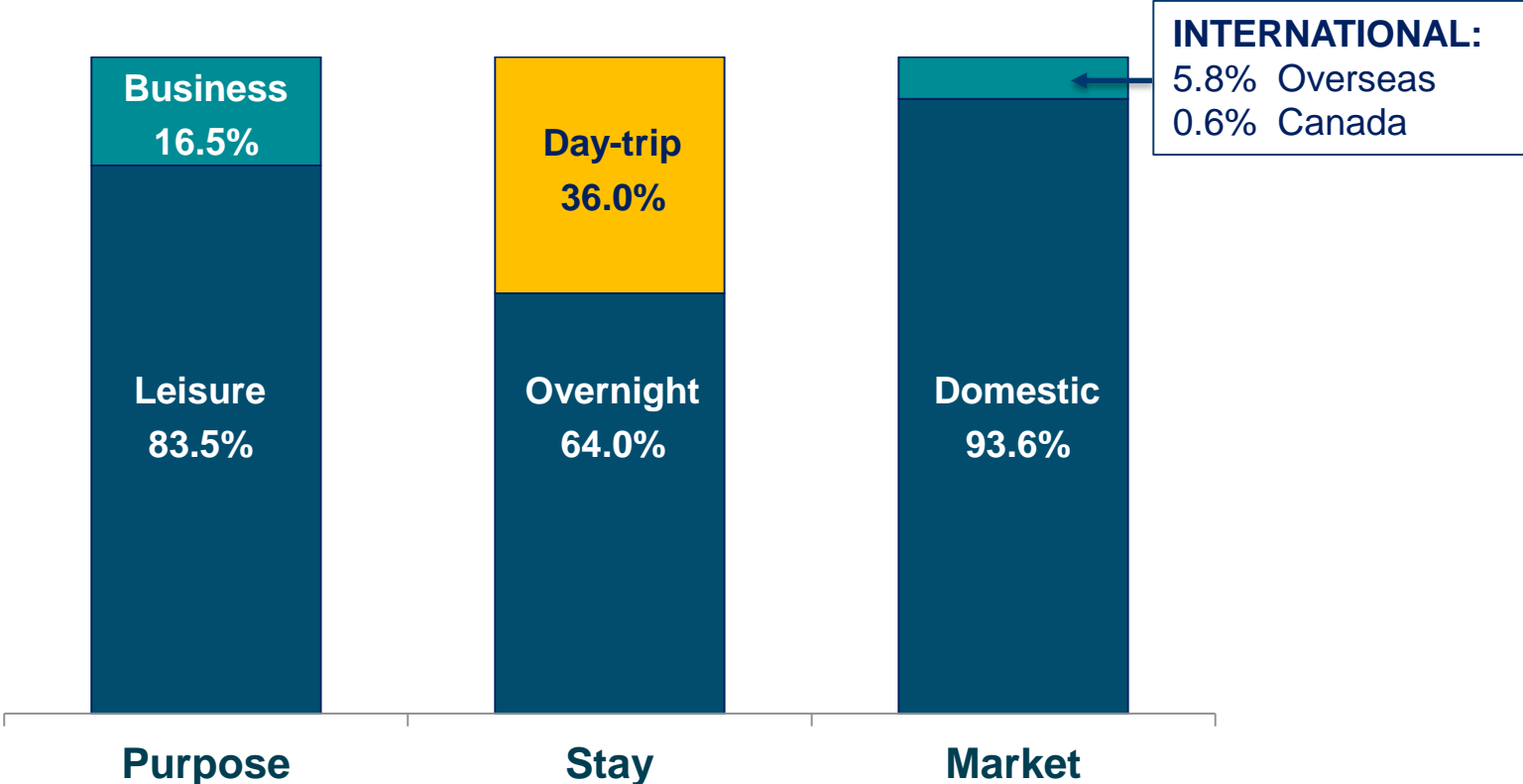
Source: Tourism Economics

\*Includes the portion of travel expenses incurred getting to and from Pennsylvania and attributable to PA (e.g., gasoline purchased out of state but used in PA or portion of an airline ticket accruing to a PA airport along with the PA portion of the ticket a traveler bought leaving the state) as calculated by the Tourism Satellite Account (TSA) model. As such, the total for domestic spend on this slide is higher than the amount reported in the "Domestic Travel Market in Detail" section of this report.



# Distribution of Traveler Spending by Market Segment

- As in prior years, U.S. domestic, total leisure, and total overnight travel remained the dominant segments for PA's travel and tourism industry in 2018.
- The share of total PA traveler spending attributable to the business travel segment rose in 2018 as a result of the segment's strong year-over-year increase.



Source: *Tourism Economics* - Shares for "Purpose" and "Stay" include spending by both domestic and international travelers.

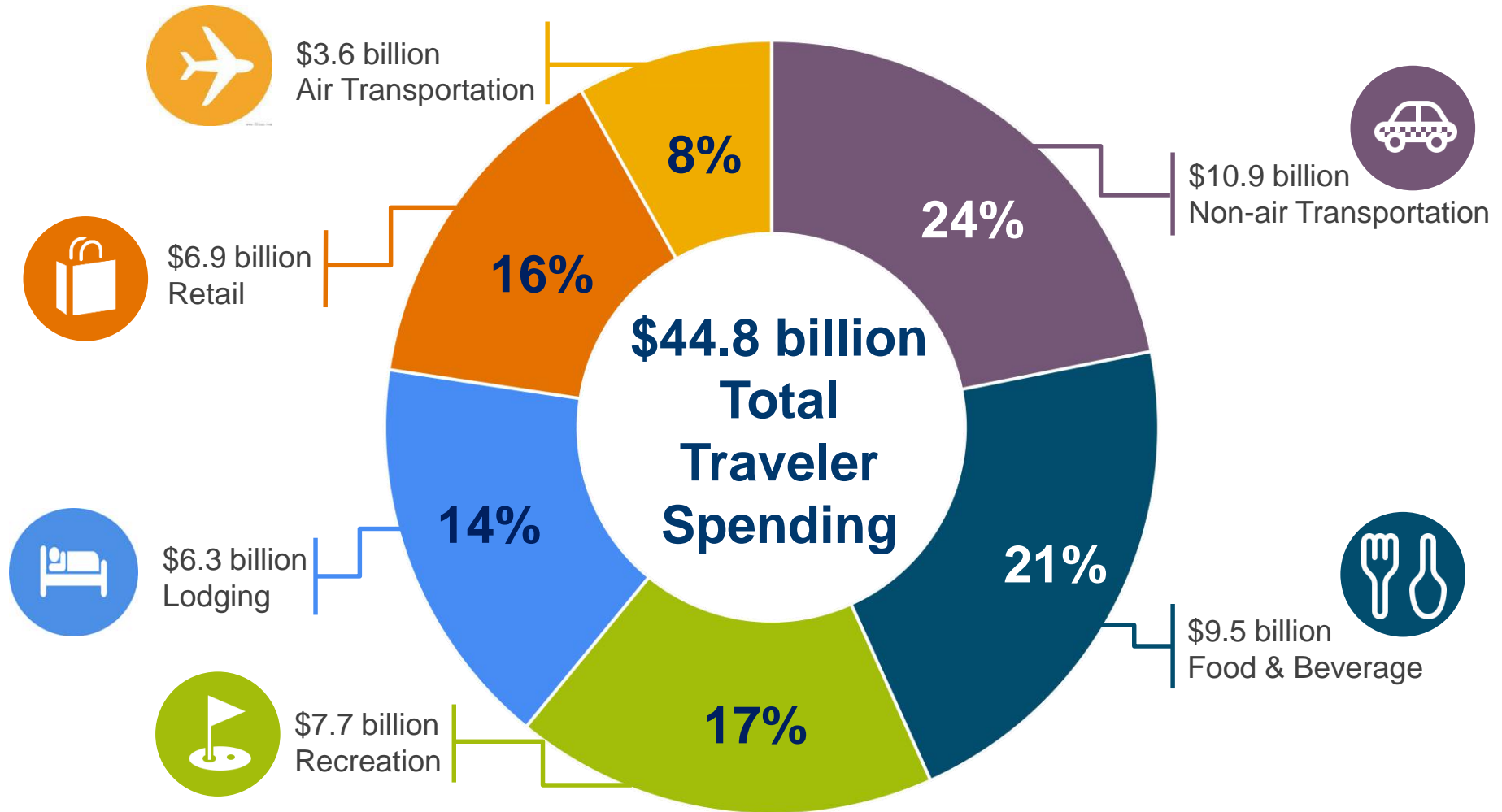
# 2018 Traveler Spending by Spending Category

- Total traveler spending rose 4.1% in 2018 – just a small fraction below 2017’s pace with all categories reaching new record highs (in nominal dollars).
- The Compound Annual Growth Rate, or CAGR, is provided for the period 2012-2018. The CAGR shows the average (mean) annual growth rate for the period. The lodging and food & beverages sectors had the strongest average growth rates for the period, followed by the recreation and air transportation sectors.

**Total Traveler Spending by Category**  
(in billions of U.S. dollars)

Sector	2012	2013	2014	2015	2016	2017	2018	% Change	% CAGR Change
Lodging	\$4.955	\$5.047	\$5.283	\$5.528	\$5.737	\$5.948	\$6.281	5.6%	3.4%
Food & Beverage	\$7.529	\$7.822	\$8.093	\$8.399	\$8.622	\$8.999	\$9.514	5.7%	3.4%
Recreation	\$6.365	\$6.575	\$6.702	\$6.915	\$7.194	\$7.542	\$7.689	1.9%	2.7%
Retail	\$6.110	\$6.165	\$6.324	\$6.496	\$6.587	\$6.745	\$6.888	2.1%	1.7%
Non-Air Transportation	\$10.525	\$10.529	\$10.201	\$10.267	\$10.142	\$10.342	\$10.850	4.9%	0.4%
Air Transportation	\$2.968	\$3.085	\$3.085	\$3.248	\$3.299	\$3.467	\$3.565	2.8%	2.7%
<b>TOTAL</b>	<b>\$38.453</b>	<b>\$39.224</b>	<b>\$39.688</b>	<b>\$40.854</b>	<b>\$41.581</b>	<b>\$43.044</b>	<b>\$44.788</b>	<b>4.1%</b>	<b>2.2%</b>
Annual Percent Change	3.8%	2.0%	1.2%	2.9%	1.8%	3.5%	4.1%		

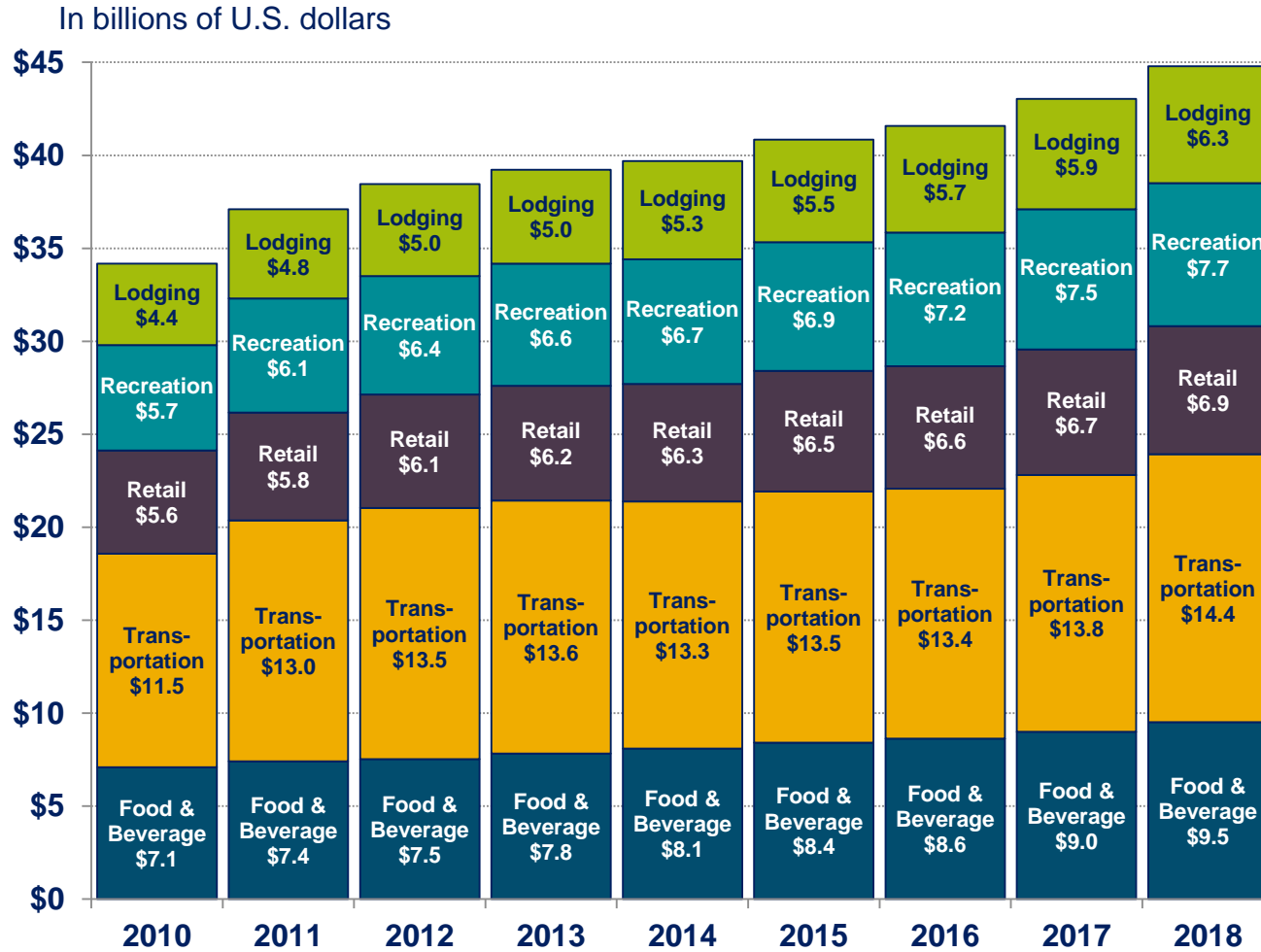
# 2018 Traveler Spending by Spending Category



*Includes spending by all domestic and international travelers and travel segments (i.e., business and leisure, day-trip and overnight). "Recreation" includes spending at attractions and on activities including both indoor (e.g., bowling) and outdoor (e.g., hiking).*

Source: *Tourism Economics*

# PA Traveler Spending by Spending Category, 2010-2018



- Buoyed by strong employment gains and continuing to feel positive about their personal finances, consumers continued to increase their spending on every category of travel-related spending in 2018.
- After posting the strongest percentage gains in travel-related expenditures for several years, the state's recreation sector had the smallest percentage increase in visitor spending in 2018 among the major spending categories and the second smallest increase in dollar terms.

*Includes spending by domestic and international travelers, business and leisure segments.*

*Source: Tourism Economics*

# Share of Total Traveler Spending by Category, 2010-2018



*Includes spending by domestic and international travelers, business and leisure segments.*

*Source: Tourism Economics*

- For the first time in several years, the recreation segment's share of total traveler spending dropped, falling to its lowest level since 2015.
- Lodging and the food & beverage sectors both captured an increased share of travelers' trip dollars, with both reaching the highest level since at least 2010.
- Transportation continued to account for the largest share of traveler dollars in 2018, responsible for roughly a third of travelers' trip budgets.

# Traveler Spending by Type of Visitor, 2017 & 2018

- The increase in total traveler spending in 2018 was derived from both the leisure and business travel segments.
- When measured in dollar terms, the leisure overnight travel segment had the largest increase by far of the four major travel segments, but the business segment far outpaced leisure when the increases are measured in percentage terms.

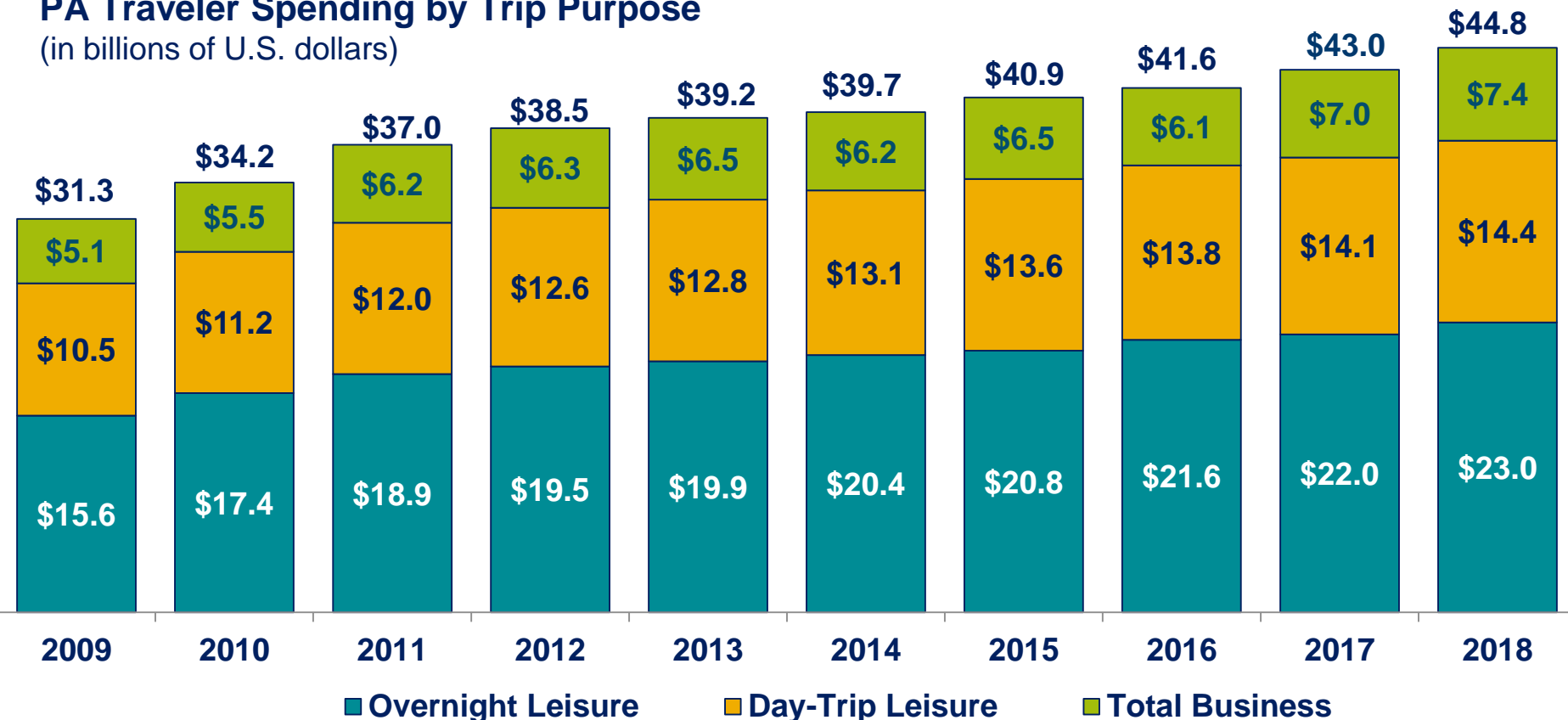
<b>Traveler Spending by Visitor Type</b> (in billions of U.S. dollars)			
<b>2018</b>	<b>Leisure</b>	<b>Business</b>	<b>Total</b>
Overnight	\$23.0	\$5.7	\$28.7
Day-Trip	\$14.4	\$1.7	\$16.1
Total	\$37.4	\$7.4	\$44.8
<b>2017</b>			
Overnight	\$22.0	\$5.4	\$27.4
Day-Trip	\$14.1	\$1.6	\$15.6
Total	\$36.1	\$6.9	\$43.0
<b>Percent Change</b>			
Overnight	4.3%	6.1%	4.7%
Day-Trip	2.6%	5.9%	3.0%
Total	3.7%	6.0%	4.1%

# Total Traveler Spending by Trip Purpose, 2009 - 2018

- The leisure and business travel segments both contributed to the increase in total traveler spending in 2018, though in percentage terms the business segment outpaced leisure.
- The overnight segment was responsible for an estimated 55% of the \$1.7 billion increase in total traveler spending in 2018.

## PA Traveler Spending by Trip Purpose

(in billions of U.S. dollars)



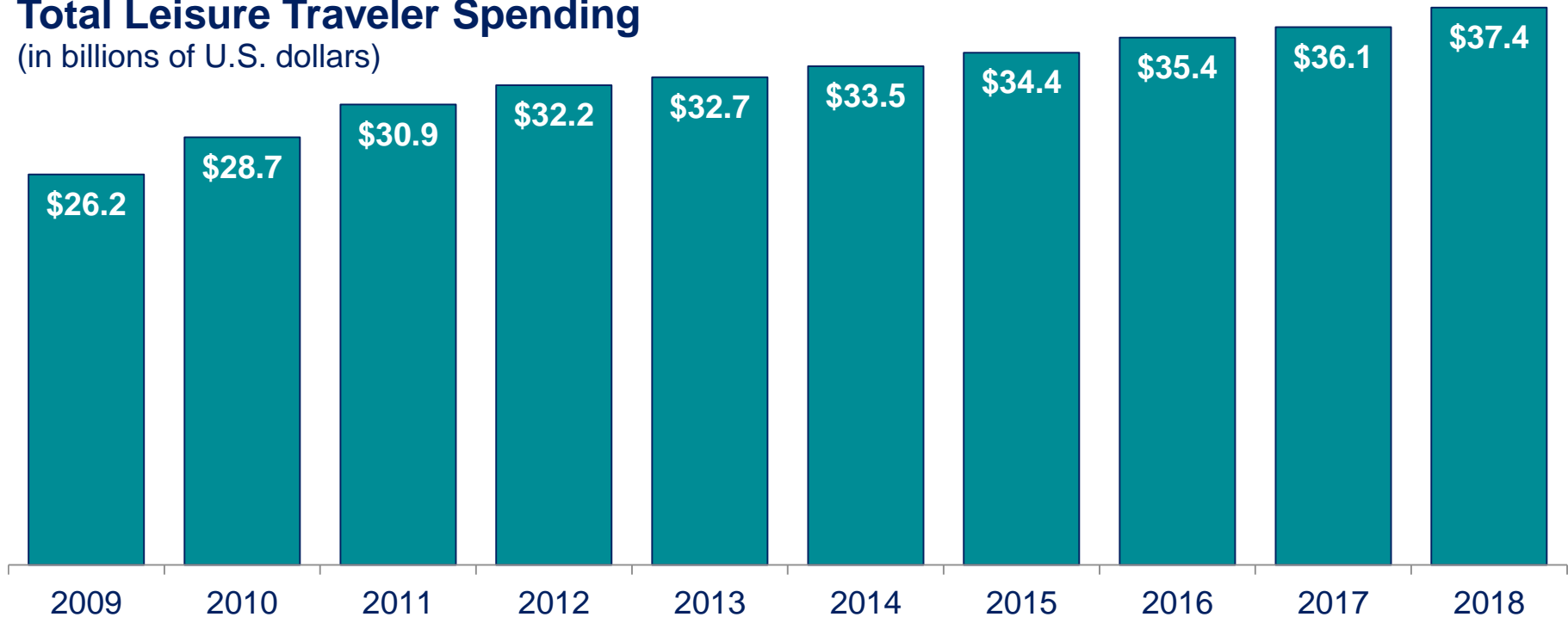
Source: Tourism Economics

# Total Leisure Traveler Spending, 2009 - 2018

- Total leisure traveler spending (includes domestic & international, overnight & day-trip segments) grew 3.7% (or by \$1.3 billion) to reach a new record high of \$37.4 billion in 2018 (in dollars not adjusted for inflation).
- As in 2017, while both overnight and day-trip leisure segments registered increases in 2018, the strongest increase in both dollar and percentage terms was by overnight travelers.

## Total Leisure Traveler Spending

(in billions of U.S. dollars)



Source: *Tourism Economics*

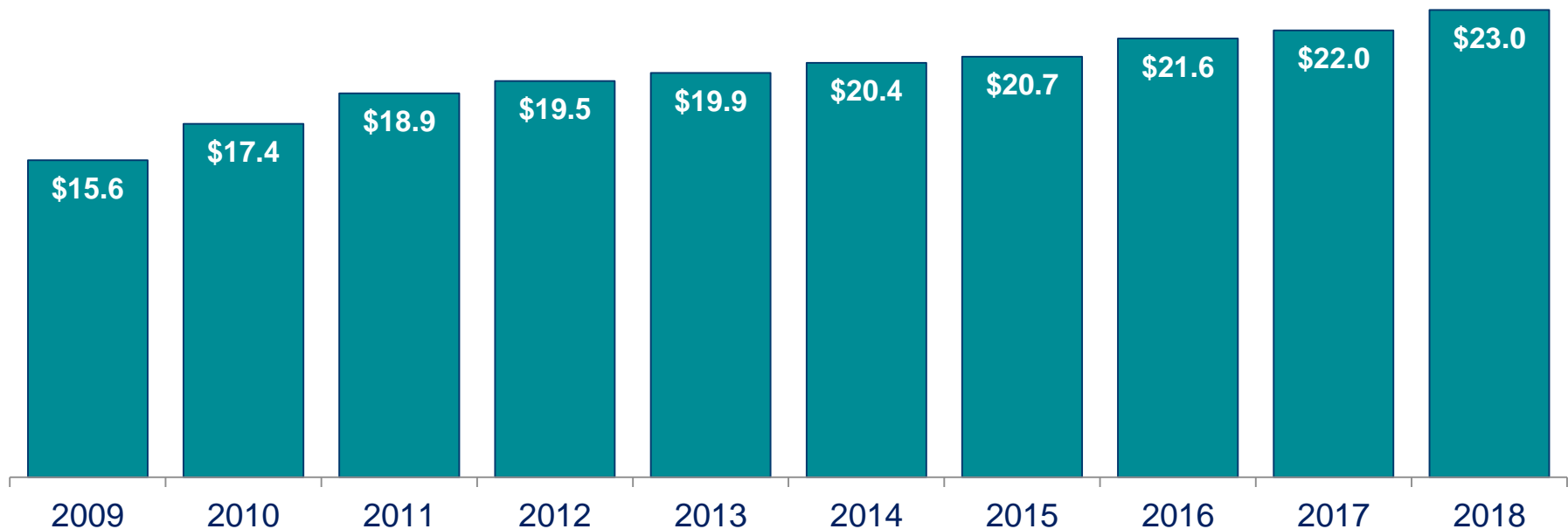


# Total Overnight Leisure Traveler Spend, 2009 - 2018

- Total spending by the state's overnight leisure travelers (includes domestic & international, business-leisure trips, overnight & day-trip segments) reached a new record high of \$23.0 billion in 2018.
- Spending by Pennsylvania's overnight leisure travelers rose 4.3% from 2017, or by close to \$1 billion due to increases in both the number of travelers and per trip spending, continuing the segment's trend of steady year-over-year increases.

## Total Overnight Leisure Traveler Spending

(in billions of U.S. dollars)



Source: Tourism Economics

# The Domestic Travel Market in Detail

# Domestic Visits and Traveler Spending

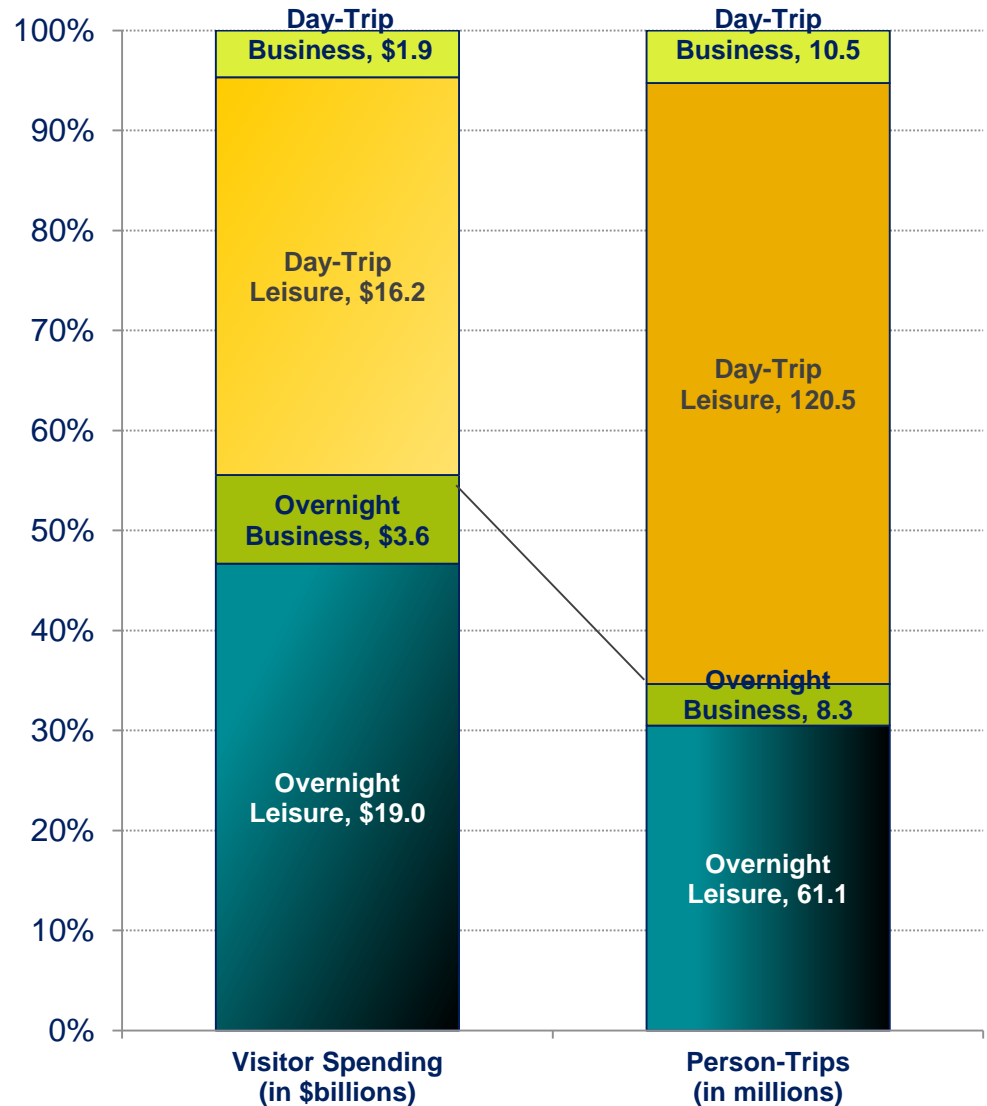
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*(It is important to note the estimates presented in this section are based solely on self-reported consumer survey responses and exclude certain spending attributable to Pennsylvania that is detailed in other sections of this report but not captured in the consumer survey. As such, the figures for domestic travelers presented in this section will differ slightly from those presented in other sections, but nevertheless provide valuable insight into the spending behavior of U.S. travelers in Pennsylvania in 2018.)*

- According to Longwoods International, Pennsylvania hosted an estimated 205.7 million U.S. (*i.e.*, domestic) travelers in 2018 (as measured in “person-trips”) – a 1.8% increase from 2017.
- The increase in the number of travelers coupled with a 2.5% increase in their average per-trip spending resulted in a 4.4% increase in total domestic traveler spending in Pennsylvania equal to an estimated \$41.9 billion in 2018.
- Slightly more than a third of travelers (71.9 million, up 3.3% ) stayed overnight during their 2018 Pennsylvania trip, while an estimated 133.8 million day-trips were taken to and/or within Pennsylvania – a 1.0% increase from 2017.
- All four travel segments (leisure day-trip, leisure overnight, business day-trip and business overnight) contributed to 2018’s increase in domestic traveler spending.
- Average per person-trip spending in 2018 rose slightly to an estimated \$204.

# 2018 Domestic Traveler Spending vs. Person-Trips

- This chart compares the share of traveler spending vs. trips for the four major trip types, i.e., overnight leisure, day-trip leisure, overnight business, and day-trip business. *Note: The chart excludes combined business-leisure trips since the survey does not separate out the amount of trip costs attributable to the business portion vs. the leisure portion.*
- PA's Overnight Leisure segment accounted for 30% of all person-trips in 2018 and a far higher 47% share of total domestic visitor spending, while Day-Trip Leisure accounted for 60% of domestic person-trips but just 40% of total spending. The share of traveler spending attributable to business overnight travelers was roughly twice the segment's share of person-trips.



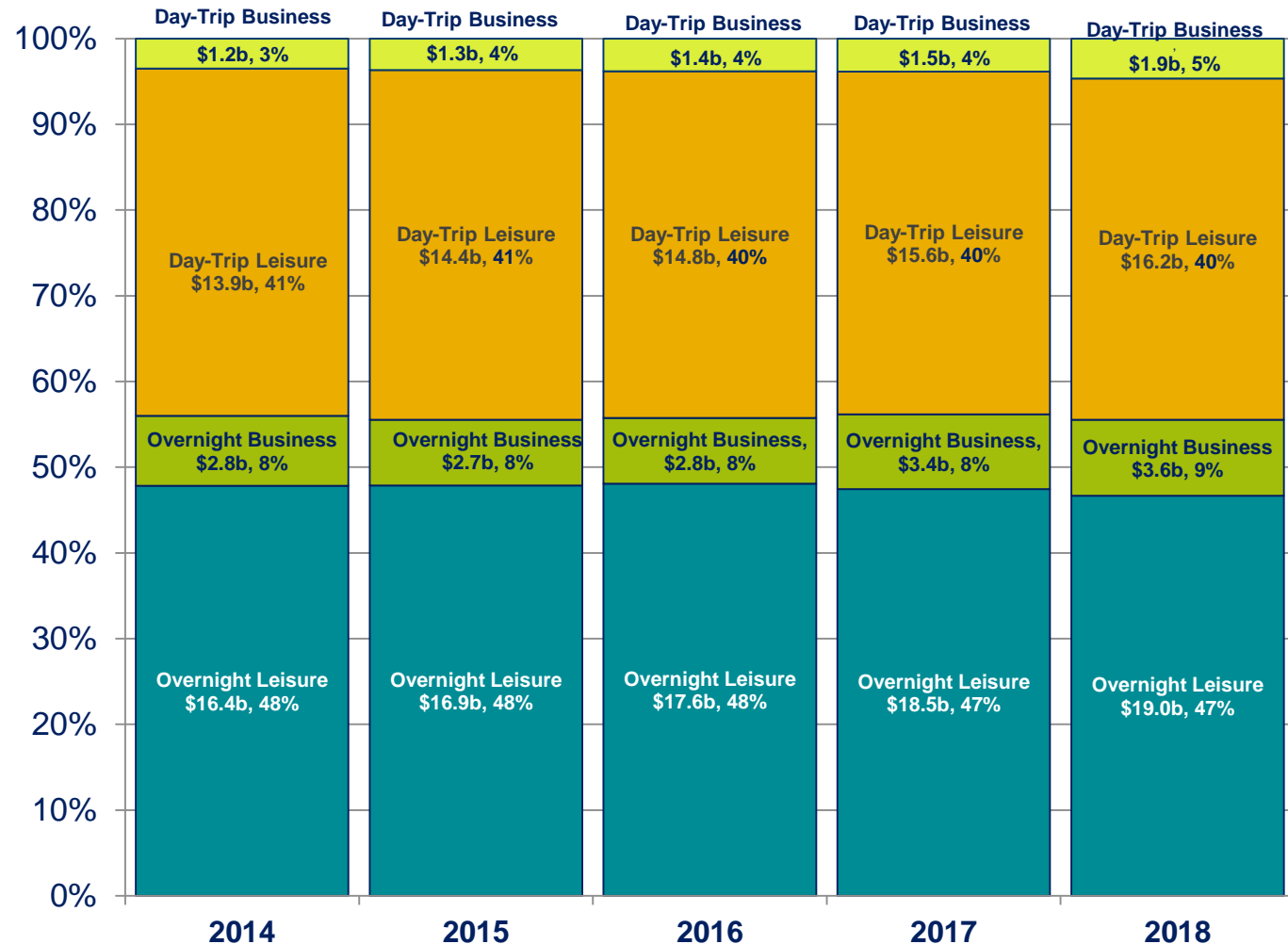
Source: Longwoods International

# Domestic Spending Trends by Trip Type, 2014-2018

- Spending by Overnight and Day-Trip Leisure travelers continued to account for close to 90% of Pennsylvania's total domestic traveler spending in 2018.
- The 1.8% increase in the number of domestic travelers coupled with the 2.5% increase in per-trip spend resulted in a 4.1% increase in total domestic visitor spending from 2018.
- The share of total traveler dollars spent by the various types of traveler are stable with just small shifts seen from year to year.

## Domestic traveler spending by trip type

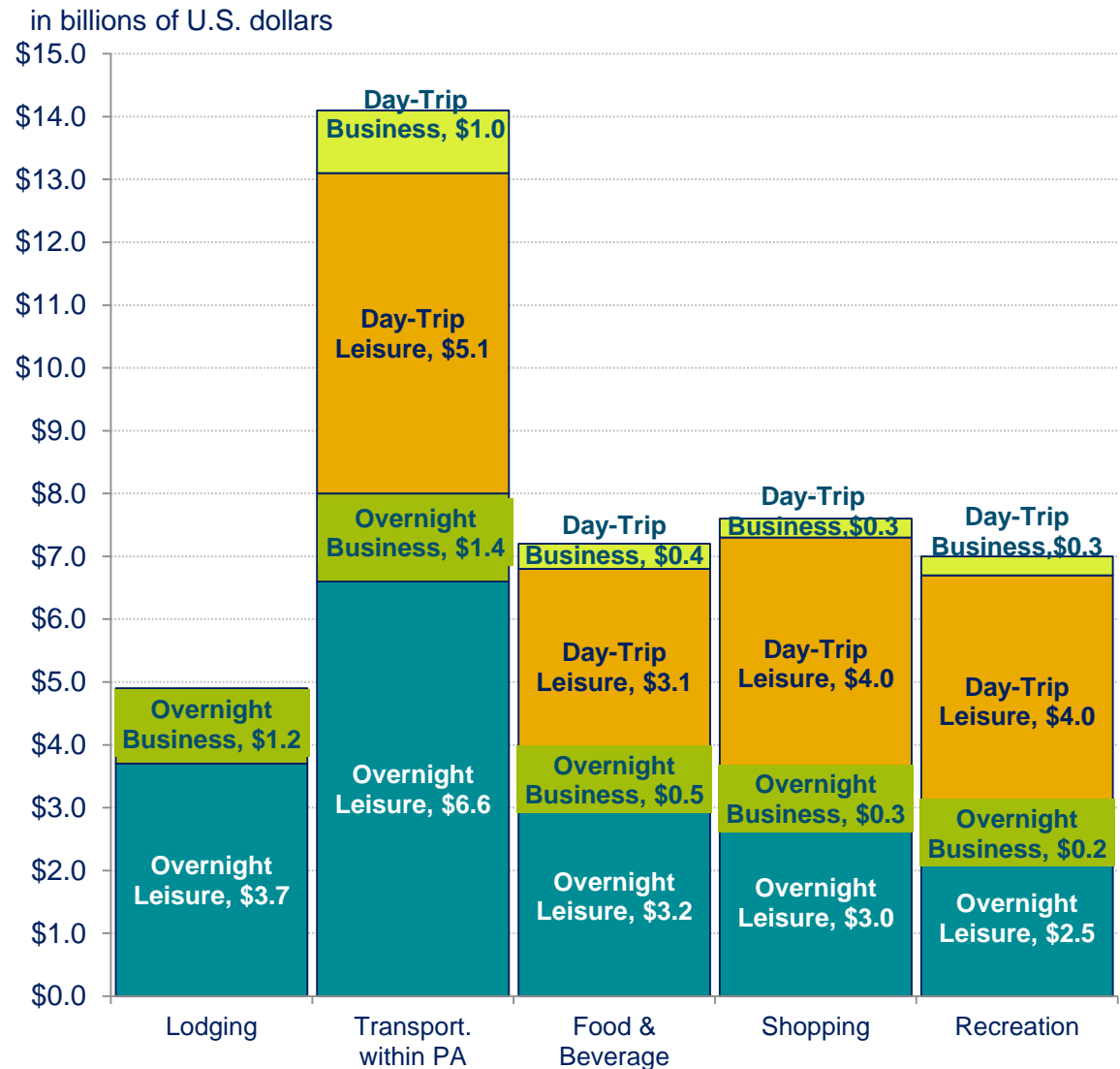
In billions of U.S. dollars and as Percent of total spending



Source: Longwoods International, DCED calculations

# Domestic Traveler Spending by Category and Trip Type, 2018

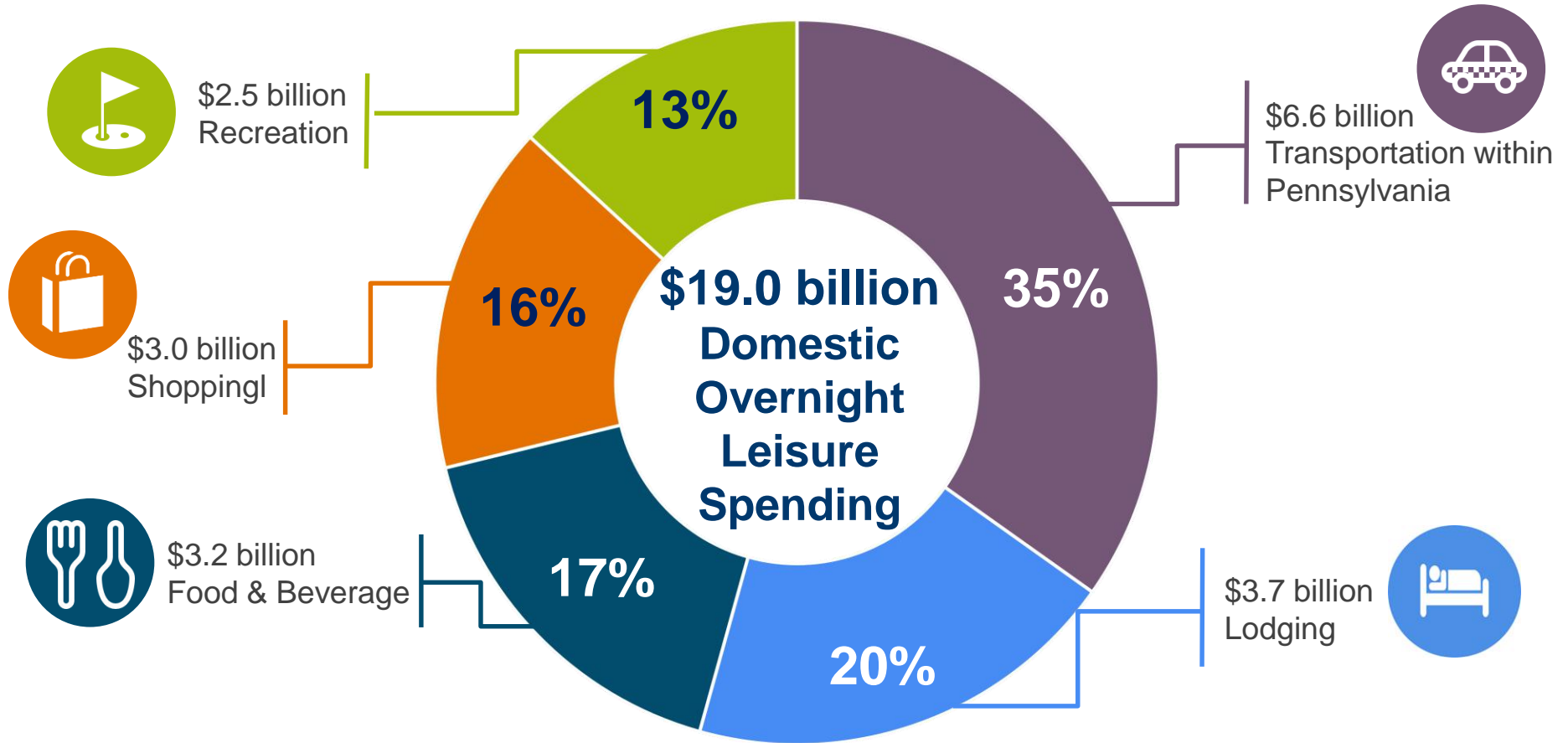
- PA's domestic Leisure travelers accounted for 86% of the state total domestic spend and for 76% of spending on lodging in 2018.
- Business overnight's 24% share of lodging spend was twice as high as the segment's 12% share of PA's total number of domestic overnight person-trips, with lodging continuing to account for a third of the segment's total spend in 2018.
- Day-Trip leisure visitors continued to account for close to 60% of domestic visitor spending on recreation in PA in 2018.



Source: Longwoods International

# Domestic Overnight Leisure Traveler Spending by Category, 2018

*PA's estimated 61.1 million overnight leisure travelers (as measured in person-trips) spent an average of \$311 per trip in 2018.*

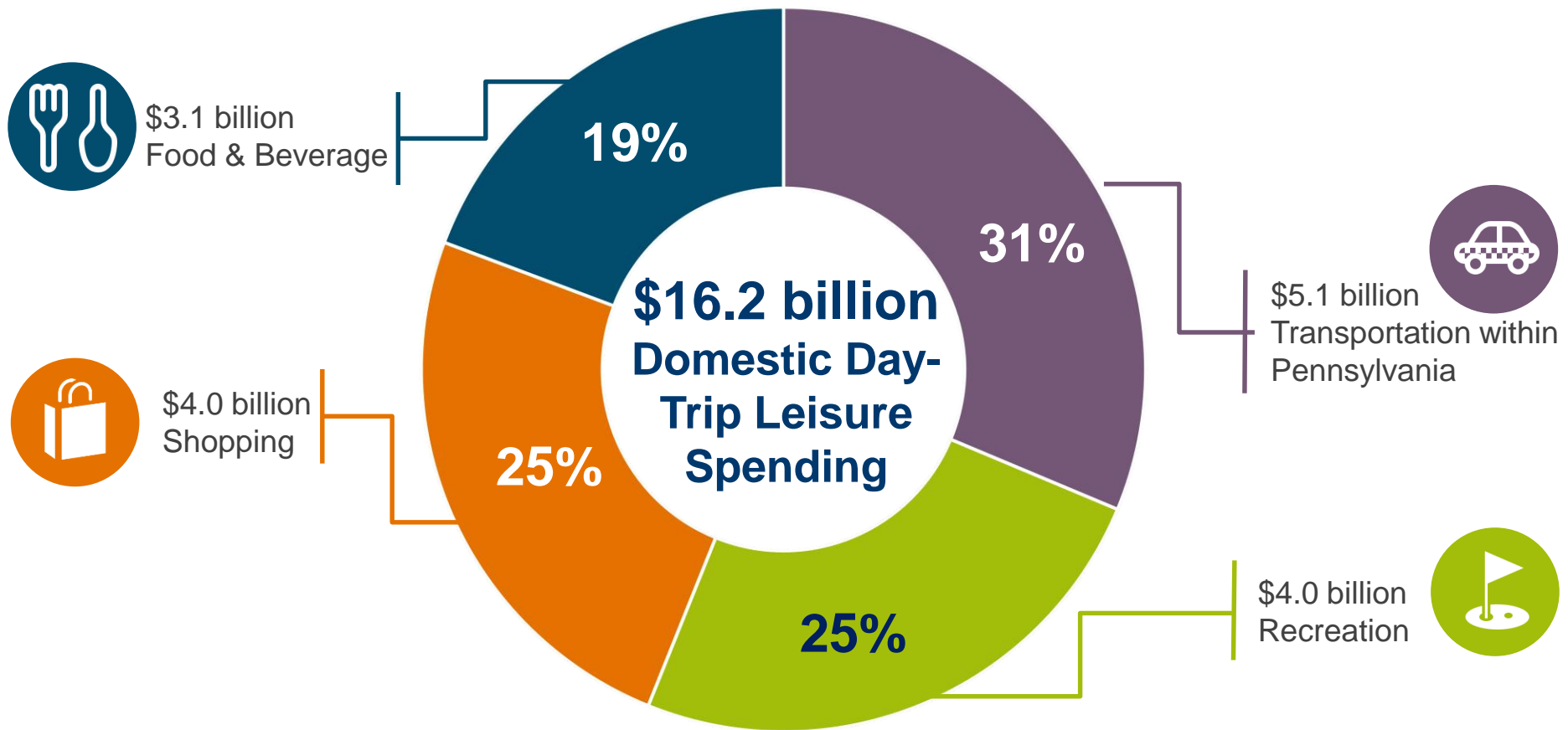


"Recreation" includes spending at attractions and on activities including both indoor (e.g., bowling) and outdoor (e.g., hiking).

Source: Longwoods International

# Domestic Day-Trip Leisure Traveler Spending by Category, 2018

*PA's 120.5 million day-trip leisure travelers spent an average of \$135 per trip in 2018, spending almost an identical amount on recreation and retail purchases.*



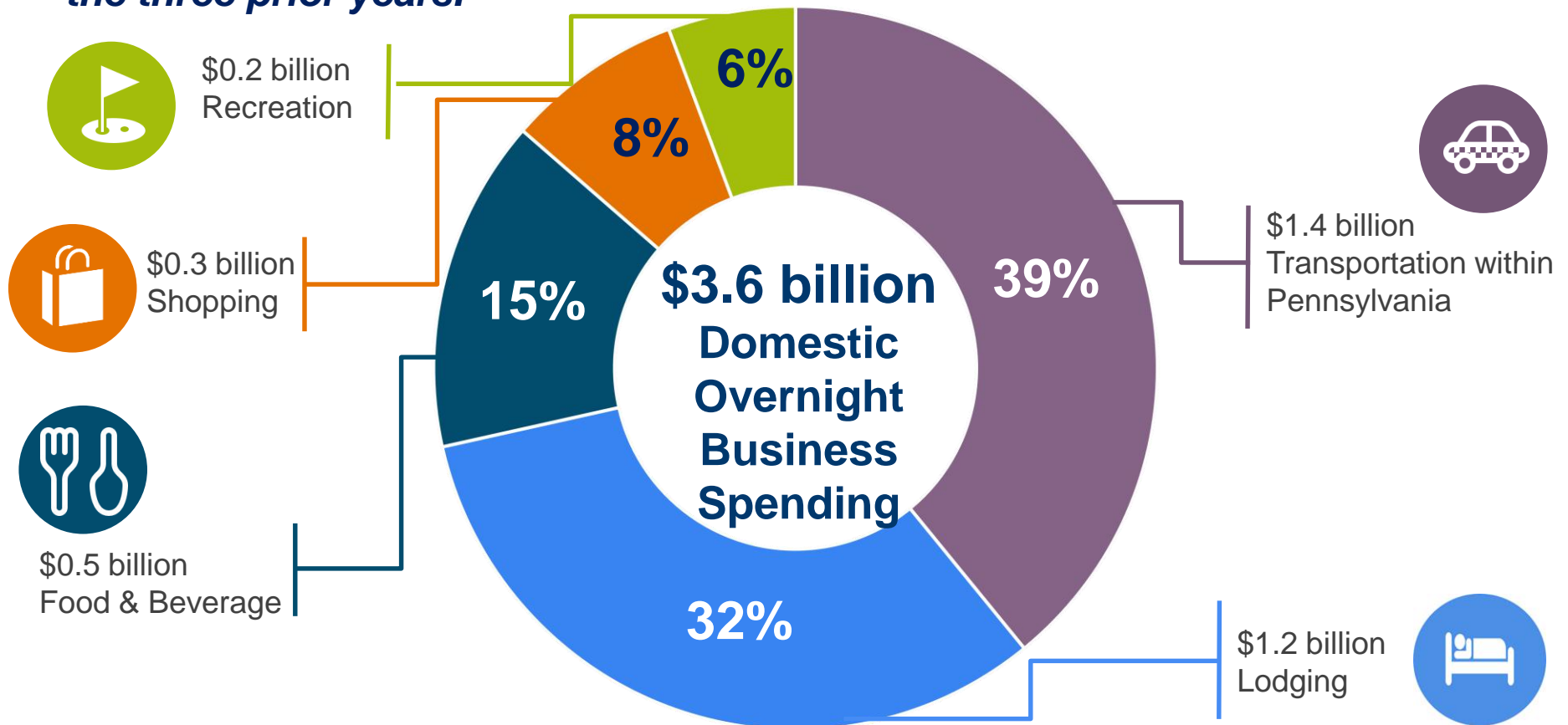
“Recreation” includes spending at attractions and on activities including both indoor (e.g., bowling) and outdoor (e.g., hiking).

Source: Longwoods International



# Domestic Business Overnight Traveler Spending by Category, 2018

**PA's estimated 8.3 million business overnight travelers spent an average of \$425 per trip in 2018, a substantial decrease in per trip spending from that of the three prior years.**

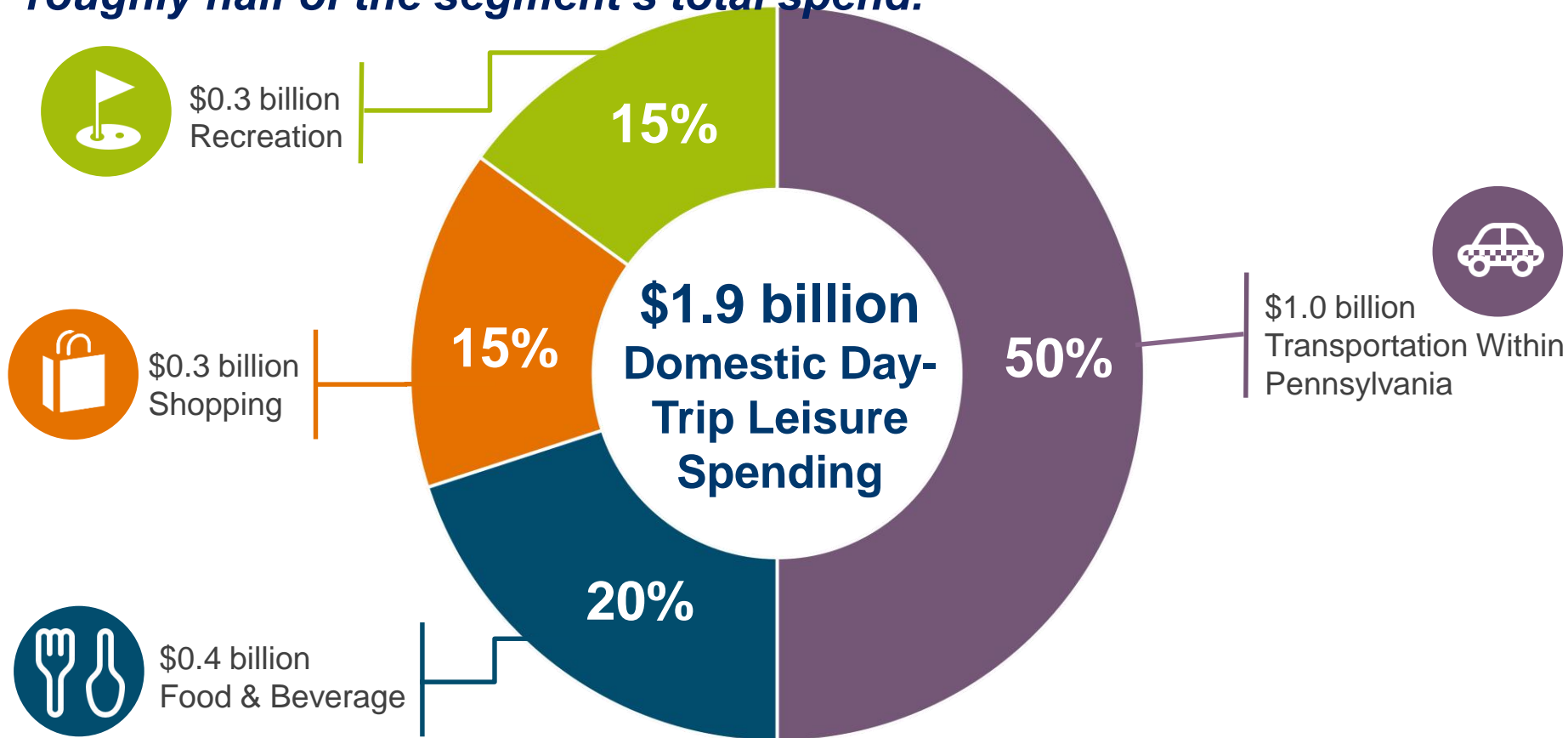


“Recreation” includes spending at attractions and on activities including both indoor (e.g., bowling) and outdoor (e.g., hiking).

Source: Longwoods International

# Domestic Day-Trip Business Traveler Spending by Category, 2018

**PA's 10.5 million day-trip business travelers spent an estimated \$180 average per trip in 2018 with transportation continuing to account for roughly half of the segment's total spend.**



“Recreation” includes spending at attractions and on activities including both indoor (e.g., bowling) and outdoor (e.g., hiking).

Source: DCED Calculations based on data from Longwoods International

# State Tourism Industry Impacts

## (Direct Impacts)



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# Travel and Tourism Industry Impact on PA GDP and Jobs, 2018

2018 PA Travel and Tourism Spending Impacts		
Industry	GDP (in billions)	Employment
Agriculture, Fishing, Mining	--	--
Construction and Utilities	--	--
Manufacturing	--	--
Wholesale Trade	--	--
Air Transportation	\$2.004	10,554
Non-Air Transportation	\$2.110	28,537
Retail Trade	\$1.596	34,617
Gasoline Stations	\$0.244	8,181
Communications	--	--
Fire, Insurance, and Real Estate (FIRE)	\$1.145	5,257
Business Services	\$0.099	1,208
Education and Health Care	--	--
Recreation and Entertainment	\$2.743	48,223
Lodging	\$3.963	60,197
Food & Beverage	\$4.152	125,351
Personal Services	\$0.401	7,440
Government	--	--
<b>Total</b>	<b>\$18.457</b>	<b>329,565</b>
<b>Percent Change</b>	<b>3.2%</b>	<b>1.2%</b>

- Travel and tourism industry impacts include only the direct value of the goods and services purchased by travelers and, as such, exclude capital investment and general government support of travel and tourism. This definition is consistent with the national economic accounts.
- PA's travel and tourism industry was responsible for close to \$18.5 billion in gross domestic product (GDP) in 2018 – a 3.2% increase from 2017 and continuing to represent 2.4% of the state's total GDP.
- Spending by travelers within PA directly supported 329,565 PA jobs – a 1.2% increase from 2017 and represented 4.2% of the state's total full and part-time employment.

# Why Spending and GDP Differ

---

- Total traveler spending in Pennsylvania totaled \$44.8 billion in 2018, yet the industry's contribution to the state's Gross Domestic Product was equal to \$18.5 billion. Why are the figures so different?
- GDP (gross domestic product) is less than traveler spending, or “sales,” because GDP measures only the locally produced value of goods and services consumed by travelers.
  - This includes the local labor, capital depreciation, and the profits of travel-related companies that are based in Pennsylvania.
  - The costs of imported goods (e.g., gasoline, food, retail goods, etc.) that come from out-of-state are excluded from the GDP calculation.
  - In addition, business profits from out-of-state companies are also excluded. For example, Wal-Mart profits leave the state and would not be included in PA's GDP.

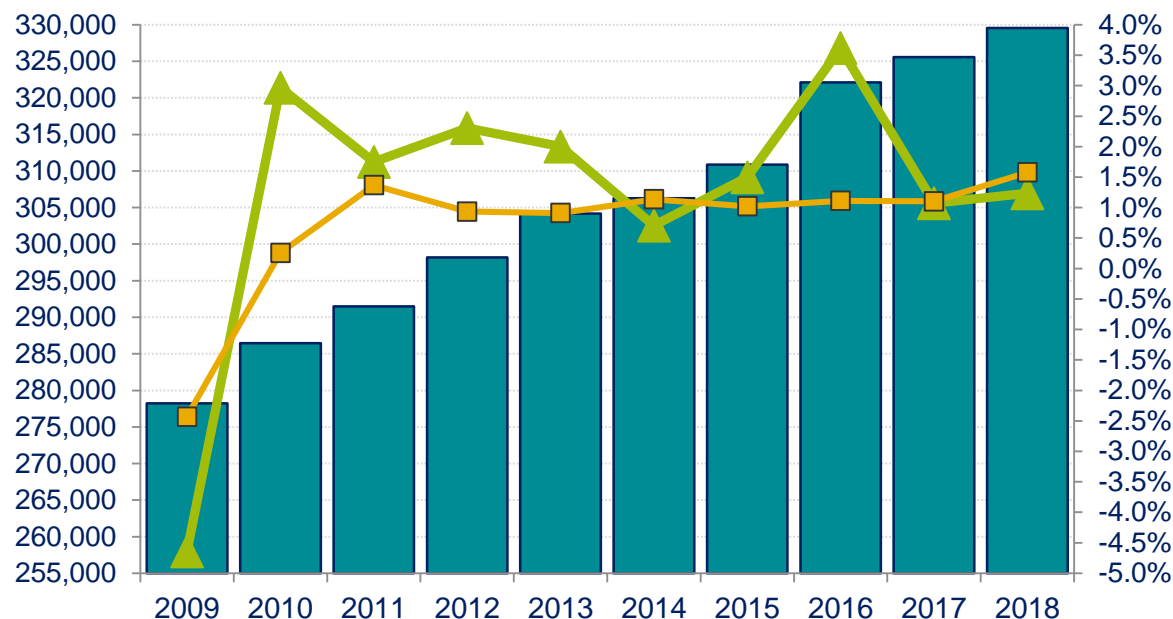
**Because of these reasons, traveler spending (i.e., “sales” made to travelers) will always be substantially higher than the industry's contribution to the state's GDP.**

# PA's Travel-Related Employment, 2009-2018

## PA Employment Supported By Travel and Tourism

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
<b>Employment</b>	278,223	286,474	291,479	298,193	304,155	306,290	310,870	322,108	325,554	329,565
<b>% Change</b>	-4.6%	3.0%	1.7%	2.3%	2.0%	0.7%	1.5%	3.6%	1.1%	1.2%

- The number of PA jobs directly supported by travel and tourism reached 329,565 in 2018, a new record high.
- After surpassing the growth rate in PA's total employment count for several years, the 1.2% increase in the state's travel-supported employment number fell below that of PA's total employment count for the second year in a row.



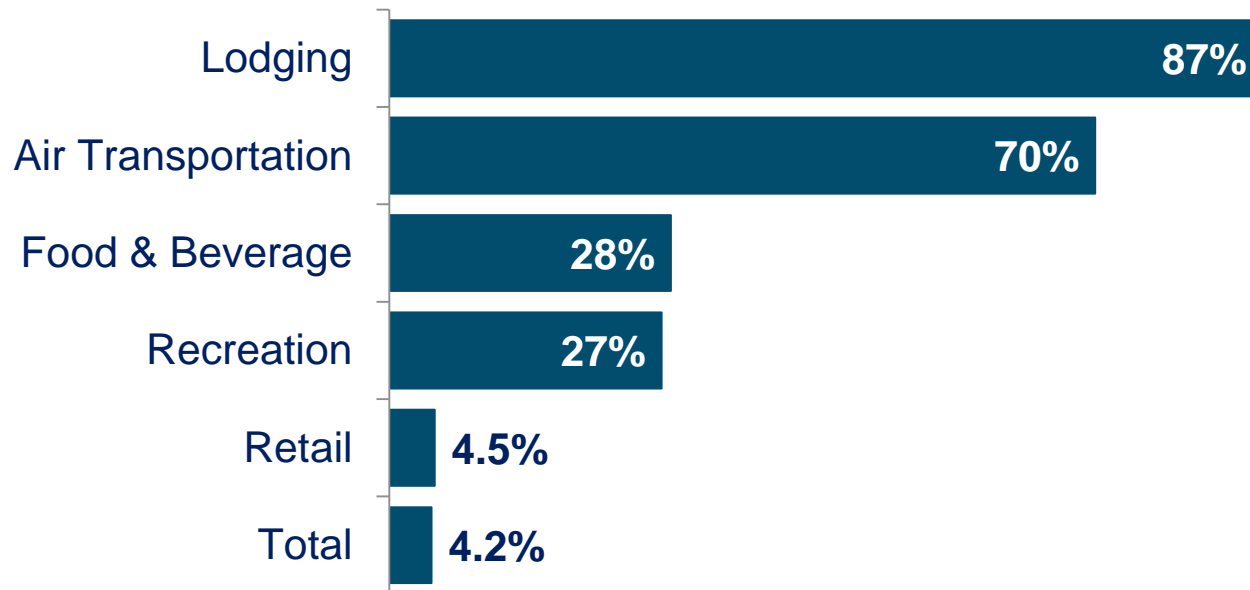
■ PA Travel-Supported Employment  
▲ % Change in PA Travel-Supported Employment  
■ % Change in Total PA Employment

Source: Tourism Economics  
DCED Calculations

# PA Travel-Related Employment Intensity by Industry, 2018

- Pennsylvania's travel and tourism industry continued to represent a significant portion of employment in the state's lodging, air transportation, food & beverage, and recreation sectors, and an estimated 4.2% of the state total in 2018.
- The proportion of jobs derived from travel & tourism for various industries continues to remain fairly constant from year to year.

## Travel and Tourism-Related Employment Intensity by Industry, 2018



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

# Ranking PA's Travel-Generated Employment, 2018

Travel and tourism dropped to 11<sup>th</sup> in a ranking of Pennsylvania's largest industries by employment in 2018, surpassed by the transportation and warehousing industry. (*Note: Travel and tourism does not have an official NAICS "industry code," but is responsible for a portion of jobs for industries with specified codes (e.g., accommodation and food services, retail trade, transportation, etc.).*)

## Employment Ranking – Private Sector Commonwealth of Pennsylvania, 2018

Ranking	Industry	Employment
1	Health care and social assistance	1,128,504
2	Retail Trade	762,997
3	Manufacturing	603,101
4	Professional, scientific, and technical services	526,859
5	Accommodation and food services	515,346
6	Other services, except public administration	425,216
7	Finance and insurance	410,639
8	Administrative and waste management services	402,080
9	Construction	398,669
10	Transportation and warehousing	393,050
11	Real estate and rental and leasing	318,945
12	Educational services	310,487
13	Wholesale trade	236,561
14	Arts, entertainment, and recreation	177,530
15	Management of companies and enterprises	146,439
16	Information	105,200

**PA Jobs Directly  
Supported by Travel  
329,565**

Source: U.S. Bureau of Economic Analysis, "SAEMP25N Total Full-Time and Part-Time Employment by NAICS Industry" ; Tourism Economics



# **Pennsylvania's Total Travel & Tourism Economy**

**Tourism Satellite Account Measures**

**Translating Sales (*Visitor Spending*) into Impact**

# Travel Economy Impact vs. Travel Industry Impact

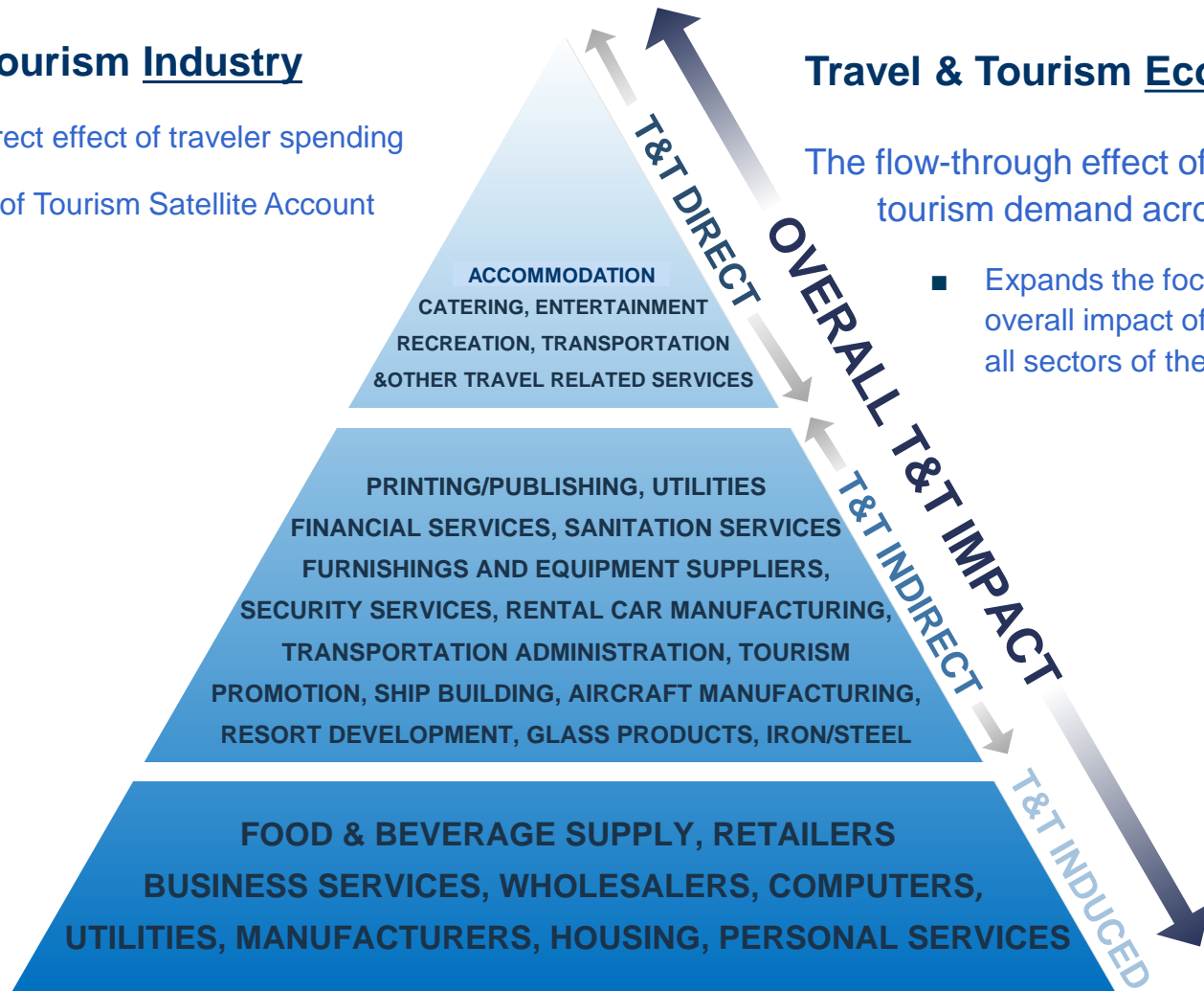
## Travel & Tourism Industry

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

## Travel & Tourism Economy

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

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



# Spending on Travel & Tourism by Category, 2014-2018

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

## Total Spending by Category – Tourism Satellite Account (in billions of U.S. dollars)

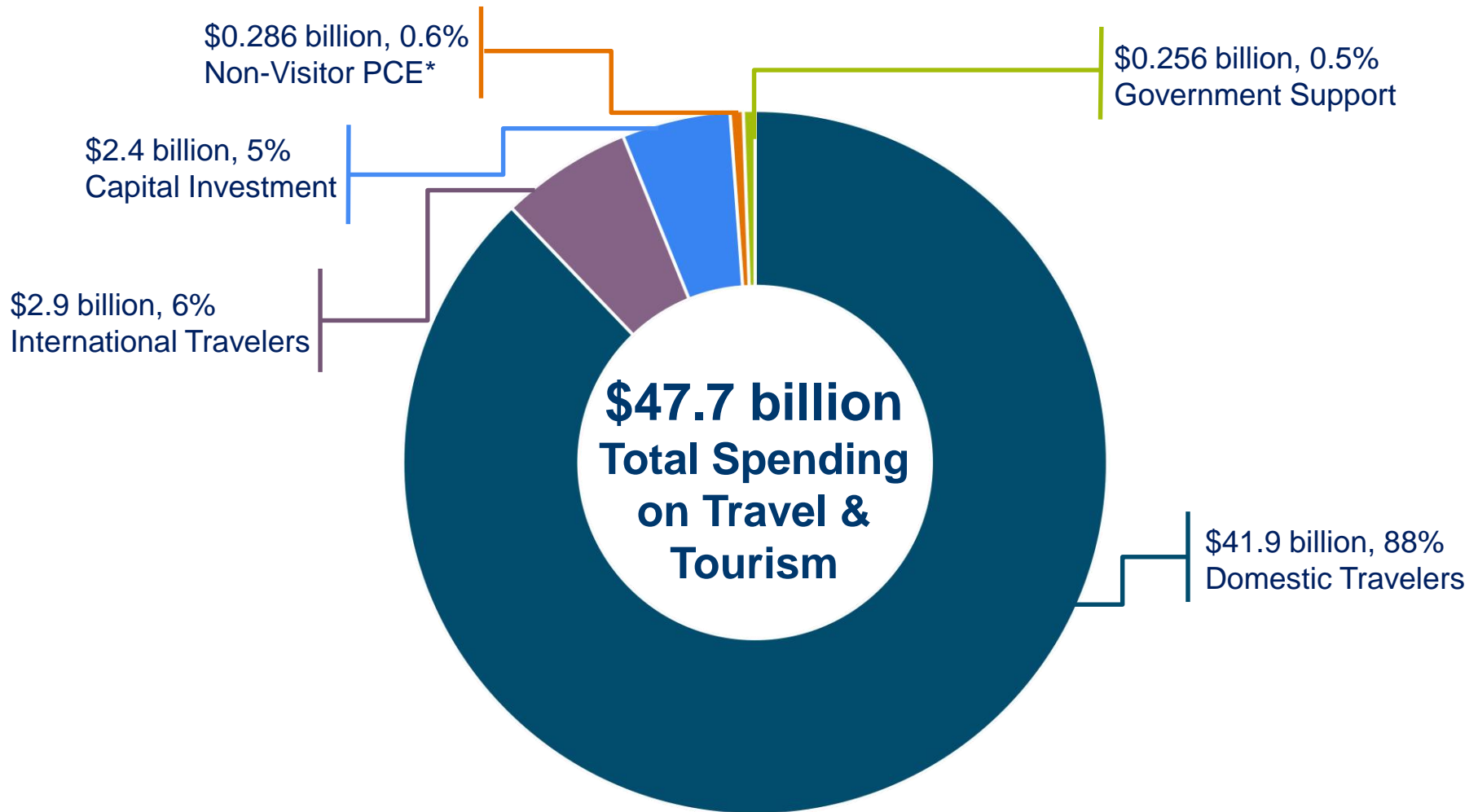
Calendar Year	Domestic Visitor Spending	International Visitor Spending	Non-Visitor PCE*	Government Support <sup>+</sup>	Capital Investment <sup>#</sup>	Total
2018	\$41.913	\$2.876	\$0.286	\$0.256	\$2.376	\$47.706
2017	\$40.164	\$2.880	\$0.273	\$0.235	\$2.161	\$45.712
2016	\$38.783	\$2.798	\$0.258	\$0.215	\$1.589	\$43.642
2015	\$38.134	\$2.720	\$0.207	\$0.195	\$1.941	\$43.197
2014	\$37.031	\$2.657	\$0.237	\$0.180	\$1.923	\$42.027
<b>% Change, 2017-2018</b>	4.4%	-0.1%	4.7%	8.9%	10.0%	4.4%
<b>CAGR, 2014 - 2018</b>	2.5%	1.6%	3.8%	7.3%	4.3%	2.6%

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

<sup>+</sup>Government support for travel and tourism includes the budget for the state tourism office and local tourism and local tourism promotion agencies derived from the local room tax and other government support, state-supported attractions (e.g., the State Museum), security, and other items in broad support of the industry.

<sup>#</sup>Capital investment includes construction travel-related infrastructure and equipment.

# Total Spending on Travel and Tourism by Category, 2018



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

Source: Tourism Economics

# Travel & Tourism Industry Capital Investment in PA, 2008-2018

## Travel- and Tourism-Related Capital Investment (in millions of U.S. dollars)

Capital Investments	2008		2014	2015	2016	2017	2018	2017-18 % Change	2014-18 CAGR
Construction	\$1,282		\$ 983.3	\$ 975.3	\$ 606.2	\$1,144.7	\$1,318.3	15.2%	6.0%
Machinery & Equipment	808		\$ 939.5	965.3	\$ 982.6	1,015.8	\$1,058.1	4.2%	2.4%
<b>Total</b>	<b>\$2,089</b>		<b>\$1,922.8</b>	<b>\$1,940.6</b>	<b>\$1,588.8</b>	<b>\$2,160.6</b>	<b>\$2,376.4</b>	<b>10.0%</b>	<b>4.3%</b>
% Change			24.8%	0.9%	-18.1%	36.0%	10.0%		

- The travel and tourism industry invested close to \$2.4 billion in capital-intensive construction and machinery & equipment projects in Pennsylvania in 2018 – a 10% increase from 2017 and surpassing 2008’s previous record high level for the second straight year.
- Investments in both construction and machinery & equipment projects in 2018 were both at their highest levels for the first time since 2008. Over the past several years, investments in machinery & equipment have been relatively constant with annual increases ranging between 1% and 4%. In contrast, investments in construction projects have varied greatly – from a high of 89% in 2017 to a 38% drop between 2015 and 2016.

# Sales to Travelers in PA & Tourism Satellite Account, 2018

- The primary and direct impact of travel and tourism is driven by sales made to travelers. Measuring sales allows for apples-to-apples comparisons with other industries.
- The total economic impact of the travel and tourism industry as measured by the Tourism Satellite Account includes: capital investment in travel-related facilities and businesses in support of travel and tourism; non-travel private consumption expenditures (PCE); and government support, in addition to traveler spending.

2018 PA Traveler Spending vs. Total Impact By Expenditure Category (in billions of U.S. dollars)		
Industry	Total Traveler Spending	Total Economy Impact
Non-Air Transportation	\$10.850	\$10.850
Food and Beverage	9.514	9.514
Recreation	7.689	7.689
Shopping	6.888	6.888
Lodging	6.281	6.281
Air Transportation	3.565	3.565
Capital Investment	0	2.376
Non-Travel Personal Consumption Exp.	0	0.286
Government Support	0	0.256
<b>Total</b>	<b>\$44.788</b>	<b>\$47.706</b>

# State Travel and Tourism Economy Impacts

(Direct, Indirect, and Induced Impacts)

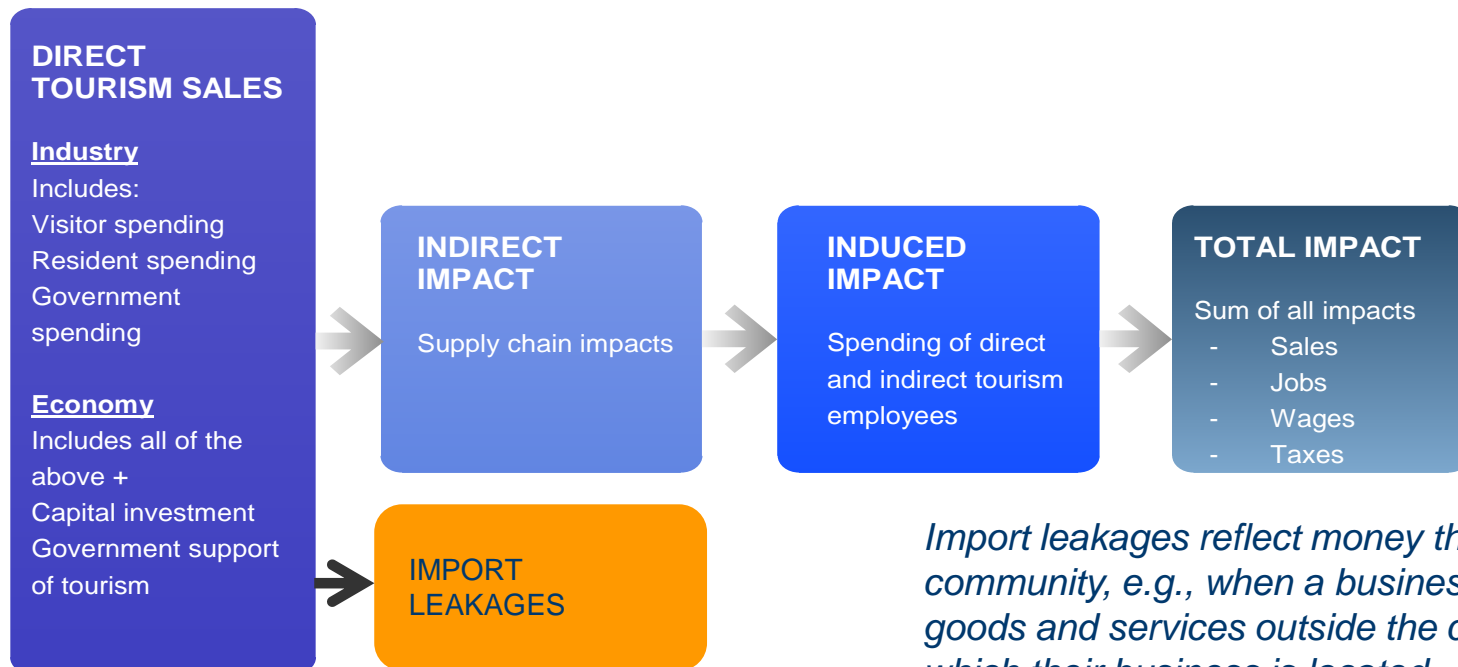


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# Translating Sales into Impact

- Direct tourism sales flow through the PA economy, generating GDP, jobs, wages, and taxes.
- The indirect impacts measure supply chain (b2b) activity generated by travel and tourism sales.
- The induced impacts measure the effects of PA worker income generated by travel and tourism-related sales and that is spent within the state.



*Import leakages reflect money that leaves the community, e.g., when a business purchases goods and services outside the community in which their business is located.*



# PA Travel Economy – GDP Impact by Industry, 2018

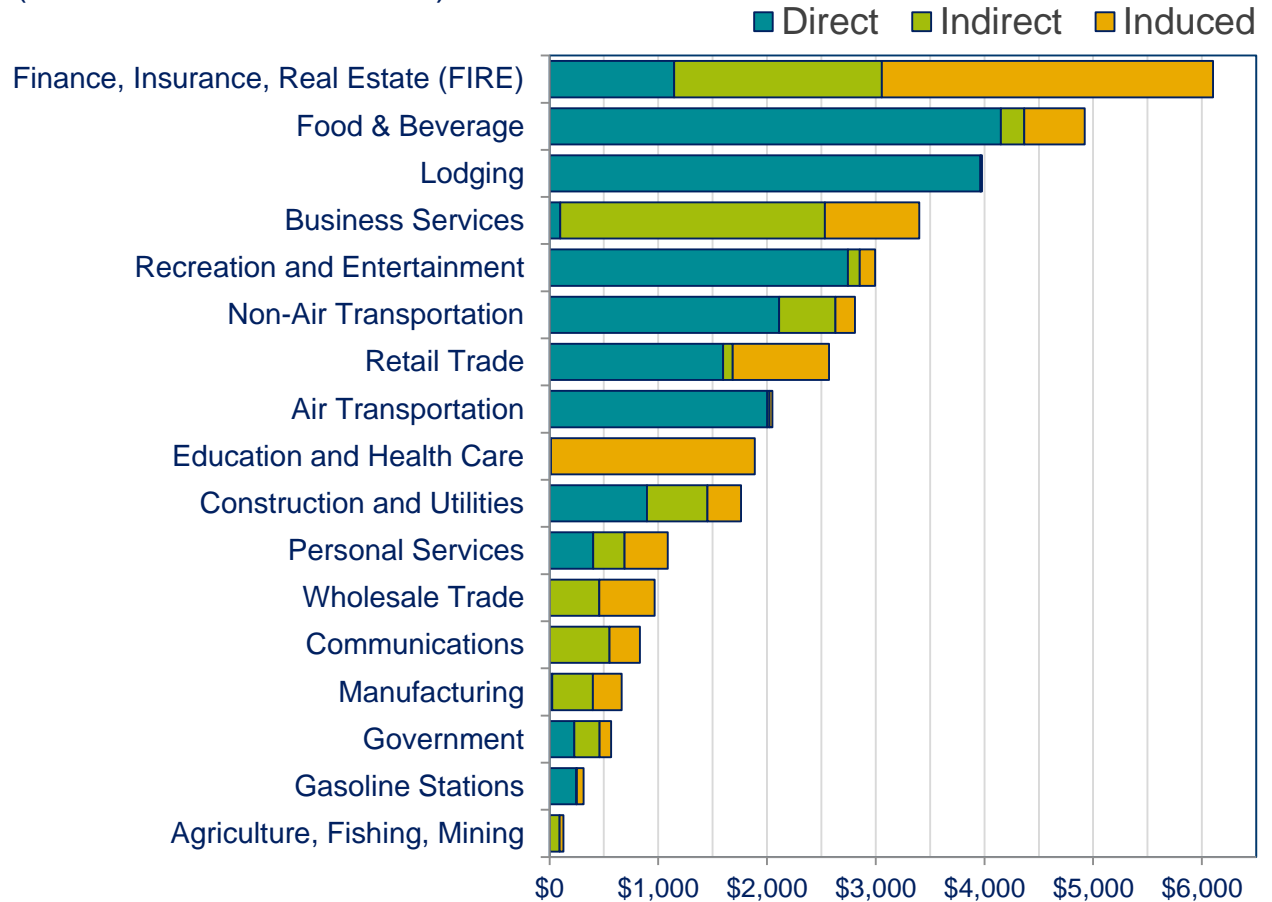
- The following table shows the direct, indirect, and induced impact of travel and tourism on Pennsylvania’s GDP for various industry sectors.
- PA’s travel and tourism industry directly generated more than \$19.6 billion in Gross Domestic Product (GDP) for the state in 2018 and more than \$36 billion under the broadest Economy measure – a figure equivalent to 4.7% of Pennsylvania’s total GDP.

2018 PA Travel Economy GDP ( <i>Value Added</i> ) (in millions of U.S. dollars)				
Industry	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	\$ --	\$93.6	\$35.2	\$128.8
Construction and Utilities	896.4	556.6	308.1	1,761.1
Manufacturing	25.0	372.8	264.7	662.4
Wholesale Trade	--	457.5	509.7	967.2
Air Transportation	2,003.7	18.5	28.1	2,050.3
Non-Air Transportation	2,110.1	518.3	181.9	2,810.3
Retail Trade	1,596.0	89.1	886.8	2,572.0
Gasoline Stations	244.1	7.5	62.4	314.0
Communications	--	551.5	281.1	832.6
Finance, Insurance, Real Estate (FIRE)	1,145.4	1,911.9	3,044.8	6,102.1
Business Services	98.6	2,434.7	867.9	3,401.3
Education and Health Care	--	13.7	1,872.8	1,886.5
Recreation and Entertainment	2,742.9	109.8	141.2	2,993.9
Lodging	3,962.6	7.4	8.5	3,978.5
Food & Beverage	4,152.2	214.3	556.9	4,923.4
Personal Services	401.1	289.0	398.5	1,088.6
Government	229.1	232.4	104.0	565.5
<b>Total</b>	<b>\$19,607.2</b>	<b>\$7,878.7</b>	<b>\$9,552.6</b>	<b>37,038.5</b>
Percent Change from 2016	3.6%	3.8%	3.8%	3.7%

# PA Travel Economy – GDP Impact by Industry, 2018

- Including the indirect and induced supply chain and income effects, travel and tourism benefits a broad spectrum of industries.
- The recreation & entertainment sector accounted for nearly \$3 billion in total GDP impact in 2018, with 92% directly derived from visitor spending – behind only lodging and air transportation in terms of the percentage of direct impact relative to the total (direct, indirect, and induced) Economy impacts.

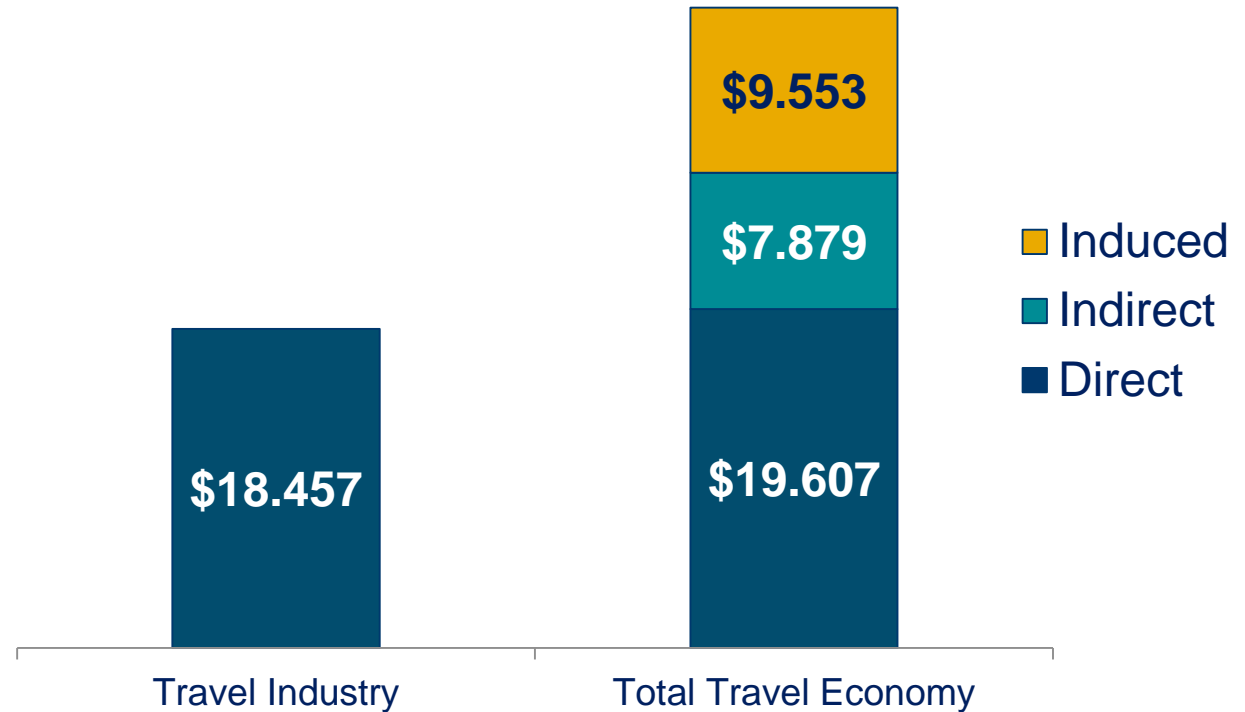
**Impact on PA GDP by Travel Economy, 2018**  
(in millions of U.S. dollars)



# PA's Travel and Tourism Industry: Industry Impact vs. Economy Impact on GDP, 2018

- Pennsylvania's travel and tourism industry directly contributed nearly \$18.5 billion to the state's gross domestic product (GDP) in 2018 (i.e., the Industry impact).
- The state's total travel and tourism Economy (including direct, indirect, and induced impacts) generated more than \$37 billion to PA's GDP in 2018 - a figure equivalent to 4.7% of the state total.

**Impact of Travel & Tourism on PA GDP, 2018**  
(in billions of U.S. dollars)



# PA Travel Economy – Employment Impact by Industry, 2018

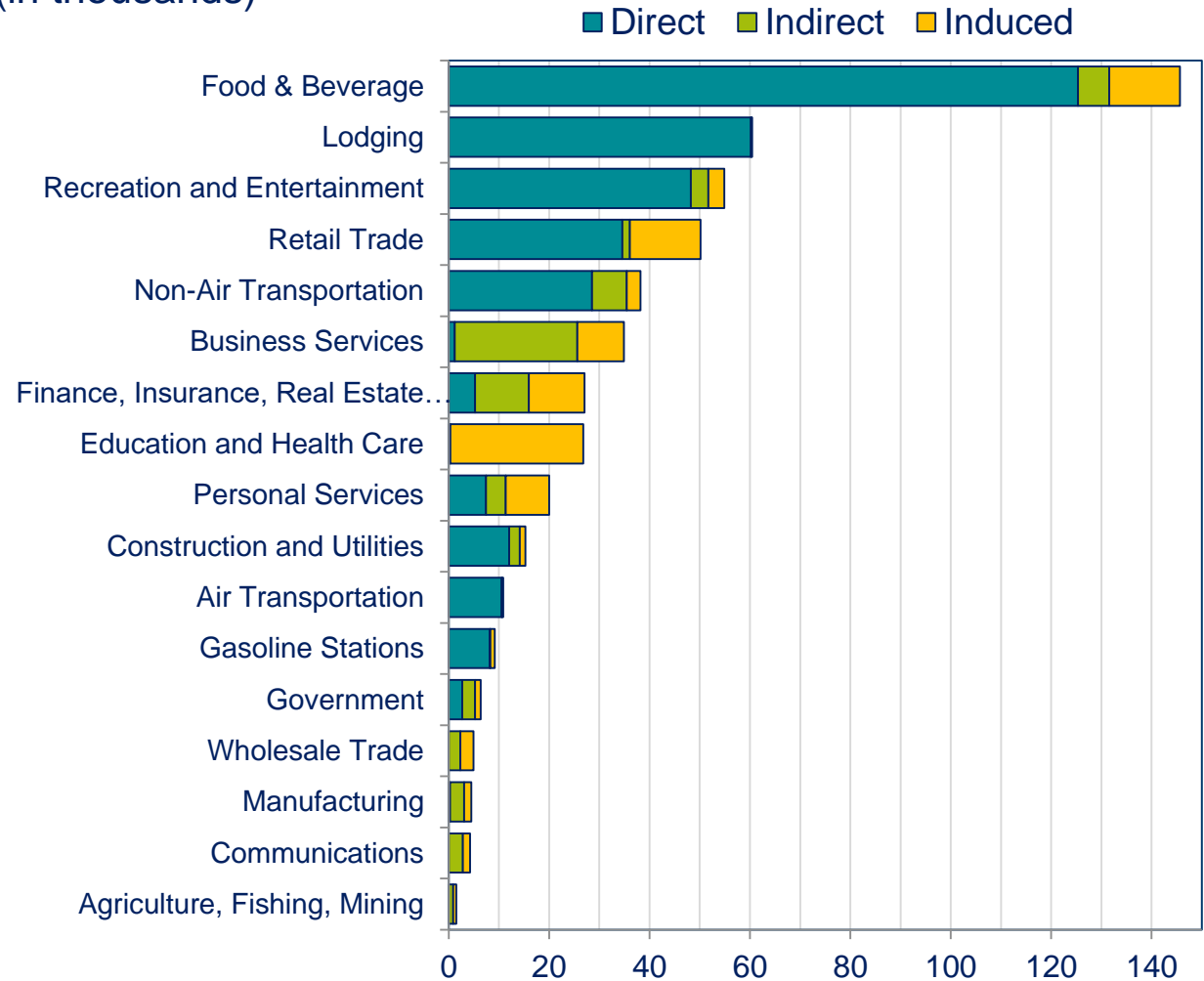
- Pennsylvania’s travel and tourism industry supported an estimated 515,072 jobs when all impacts – direct, indirect, and induced – are included, or 6.6% of PA’s total job count in 2018.
- The total presented below reflects the broadest measurement of employment, i.e., includes businesses directly serving the traveling public and their support industries, as well as jobs supported by government spending, capital investment, and private consumption expenditures.

2018 PA Travel-Related Employment ( <i>Value Added</i> )				
Industry	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	--	879	649	1,528
Construction and Utilities	12,050	2,095	1,128	15,272
Manufacturing	276	2,793	1,461	4,530
Wholesale Trade	--	2,345	2,599	4,944
Air Transportation	10,554	111	173	10,838
Non-Air Transportation	28,537	6,906	2,778	38,221
Retail Trade	34,617	1,478	14,048	50,143
Gasoline Stations	8,181	130	892	9,202
Communications	--	2,833	1,434	4,268
Finance, Insurance, Real Estate (FIRE)	5,257	10,705	11,091	27,053
Business Services	1,208	24,386	9,335	34,929
Education and Health Care	--	326	26,509	26,835
Recreation and Entertainment	48,223	3,481	3,175	54,879
Lodging	60,197	111	131	60,439
Food & Beverage	125,351	6,189	14,099	145,639
Personal Services	7,440	3,910	8,642	19,992
Government	2,675	2,572	1,113	6,361
<b>Total</b>	<b>344,566</b>	<b>71,249</b>	<b>99,258</b>	<b>515,072</b>
Percent Change from 2017	1.2%	1.0%	1.2%	1.2%

# PA Travel Economy – Employment Impact by Industry, 2018

- As in prior years, the restaurant and lodging sectors employed the most individuals in jobs supported by travel and tourism – both those who interact directly with the traveling public and those with a less direct link (e.g., suppliers, manufacturers, and those whose jobs are derived from the income spent by persons directly or indirectly supported by the travel and tourism industry).
- The secondary benefits are realized across the state’s entire economy through the supply chain and as business owner and employee incomes are spent.

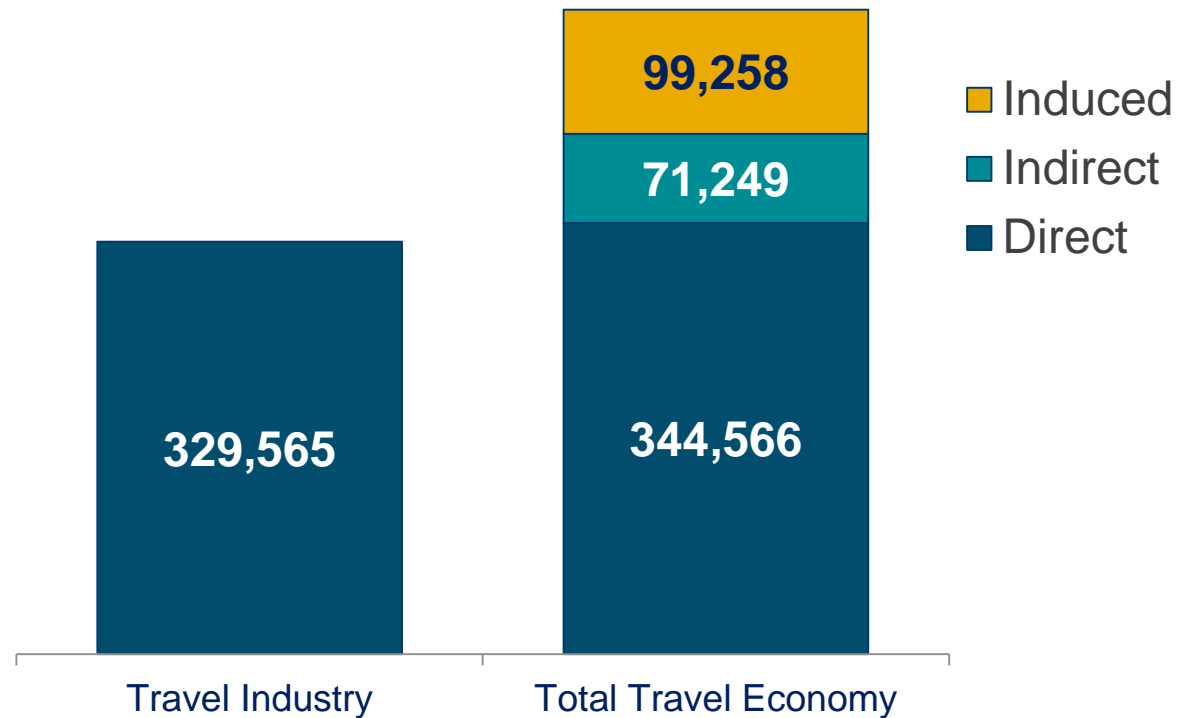
**Impact on PA Employment by Travel Economy, 2018**  
(in thousands)



# PA's Travel and Tourism Industry: Industry Impact vs. Economy Impact on Jobs, 2018

- Traveler spending directly supported an estimated 329,565 jobs in Pennsylvania in 2018 (*i.e., the travel and tourism **Industry** impact*).
- The travel and tourism **Economy** (*includes direct, indirect, and induced impacts*) supported an estimated 515,072 jobs in Pennsylvania in 2018, or a figure equivalent to 6.6% of all jobs in the state.

Impact of Travel & Tourism on PA Employment, 2018



# PA Travel Economy – Labor Income Impact by Industry, 2018

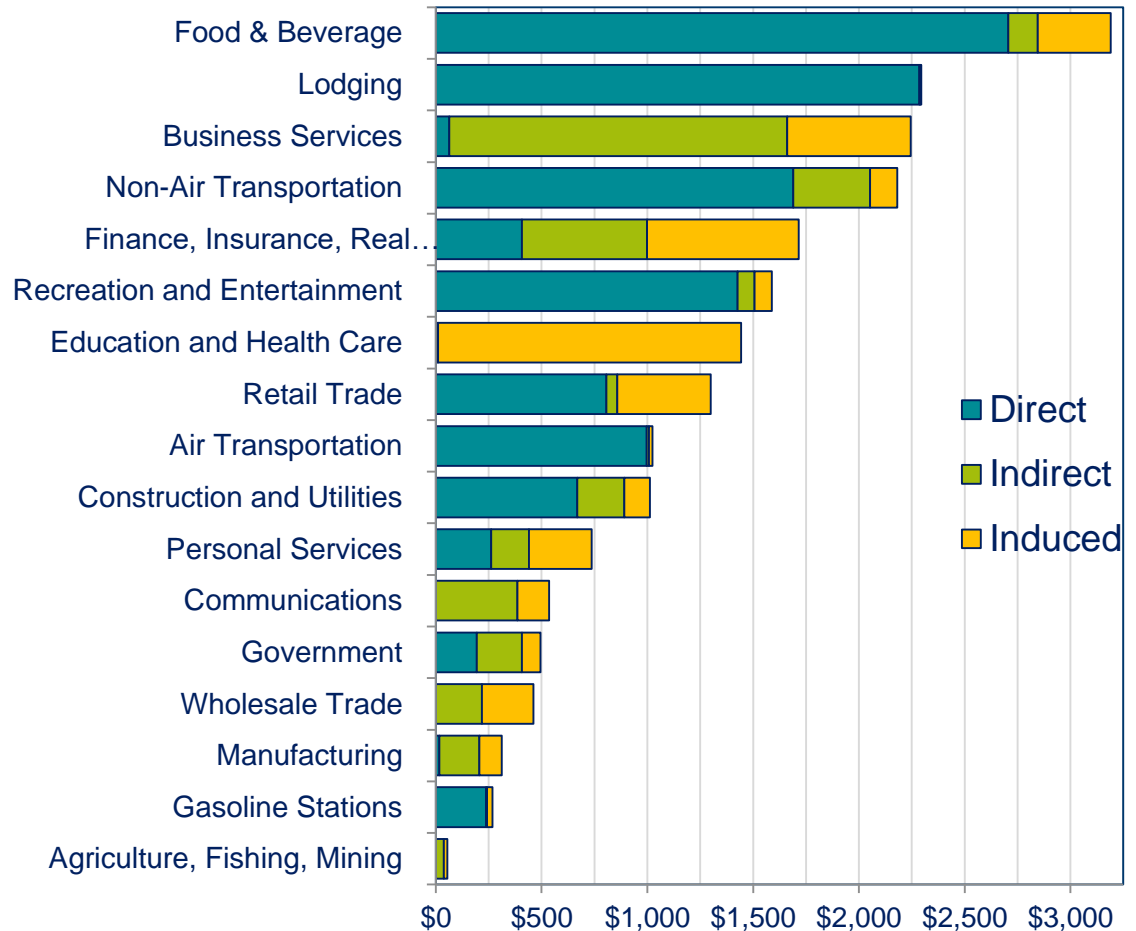
Traveler spending generated close to \$23 billion in income for persons employed by Pennsylvania businesses that were supported in some way – either directly or indirectly – by the state’s travel and tourism industry in 2018.

2018 PA Travel-Related Labor Income (Compensation) <i>(in millions of U.S. dollars)</i>				
Industry	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	\$ --	\$52.3	\$21.7	\$74.0
Construction and Utilities	750.8	243.9	132.8	1,127.5
Manufacturing	19.0	208.3	117.0	344.3
Wholesale Trade	--	225.0	250.0	475.0
Air Transportation	1,250.3	12.8	20.3	1,283.4
Non-Air Transportation	1,786.7	416.8	142.1	2,345.6
Retail Trade	868.1	52.8	461.9	1,382.8
Gasoline Stations	240.7	4.1	26.4	271.2
Communications	--	423.7	170.5	594.2
Finance, Insurance, Real Estate (FIRE)	453.5	655.5	793.2	1,902.3
Business Services	70.3	1,777.4	658.2	2,506.0
Education and Health Care	--	11.5	1,568.3	1,579.8
Recreation and Entertainment	1,716.2	93.9	97.0	1,907.2
Lodging	2,331.0	3.9	4.6	2,339.5
Food & Beverage	2,939.8	149.7	367.9	3,457.4
Personal Services	275.7	190.6	312.9	779.3
Government	199.6	218.8	89.1	507.6
<b>Total</b>	<b>\$12,901.8</b>	<b>\$4,741.1</b>	<b>\$5,234.0</b>	<b>\$22,876.9</b>
Percent Change from 2017	3.6%	3.8%	4.0%	3.7%

# PA Travel Economy – Labor Income Impact by Industry, 2018

- Traveler spending generated close \$22.9 billion for the state’s business owners and their employees, with the direct impact led by traveler intensive industries, i.e., restaurants, lodging, and transportation.
- Business owners and employees of business services and finance, insurance & real estate companies continued to derive substantial benefit from the state’s travel and tourism industry, primarily as service suppliers to the industry in 2018.

**Impact on PA Labor Income by Travel Economy, 2018**  
(in millions)





# PA Travel Economy – Tax Generation, 2012-2018

- Taxes derived from traveler spending, travel-supported, and business sales and operations generated more than \$9.7 billion in state, local, and federal tax revenues in 2018.
- Travelers were directly and indirectly responsible for more than \$4.6 billion in Pennsylvania state and local tax revenues and more than \$5.0 billion in federal taxes in 2018.
- Pennsylvania’s state and local governments would have to tax each PA household an additional \$925 per year to replace the taxes generated by travel and tourism.

## Traveler-Generated Taxes, 2012 - 2018

(in millions of U.S. dollars)

Tax Type	2012	2013	2014	2015	2016	2017	2018	% Change
<b>Federal Taxes</b>	<b>\$4,007.8</b>	<b>\$4,163.9</b>	<b>\$4,312.3</b>	<b>\$4,499.5</b>	<b>\$4,637.3</b>	<b>\$4,801.1</b>	<b>\$5,012.9</b>	<b>4.4%</b>
Corporate	405.3	411.8	418.2	431.4	484.1	501.1	548.6	9.5%
Indirect Business	385.7	391.8	397.9	410.5	409.6	414.6	421.5	1.7%
Personal Income	1,179.5	1,232.1	1,281.9	1,341.1	1,407.5	1,453.5	1,539.5	5.9%
Social Insurance	2,037.3	2,128.2	2,214.3	2,316.5	2,336.0	2,431.9	2,503.2	2.9%
<b>State and Local Taxes</b>	<b>\$4,023.6</b>	<b>\$4,132.6</b>	<b>\$4,223.8</b>	<b>\$4,366.5</b>	<b>\$4,409.7</b>	<b>\$4,516.9</b>	<b>\$4,644.7</b>	<b>2.8%</b>
Corporate	265.9	270.2	274.4	283.0	259.4	254.3	235.1	-7.6%
Personal Income	370.3	386.9	402.5	421.1	435.8	455.7	481.1	5.6%
Sales	1,507.6	1,533.6	1,553.4	1,595.9	1,611.3	1,650.1	1,697.2	2.9%
Hotel Occupancy	143.6	152.9	160.0	170.4	183.4	200.2	217.8	8.8%
Property	1,155.6	1,195.5	1,227.1	1,259.5	1,317.7	1,350.4	1,424.1	5.5%
Excise and Fees	548.3	559.9	571.4	599.9	567.6	570.3	554.8	-2.7%
PA Unemployment	32.2	33.7	35.0	36.6	34.5	35.9	34.6	-3.6%
<b>TOTAL</b>	<b>\$8,031.4</b>	<b>\$8,296.5</b>	<b>\$8,536.1</b>	<b>\$8,866.1</b>	<b>\$9,047.0</b>	<b>\$9,318.0</b>	<b>\$9,657.5</b>	<b>3.6%</b>

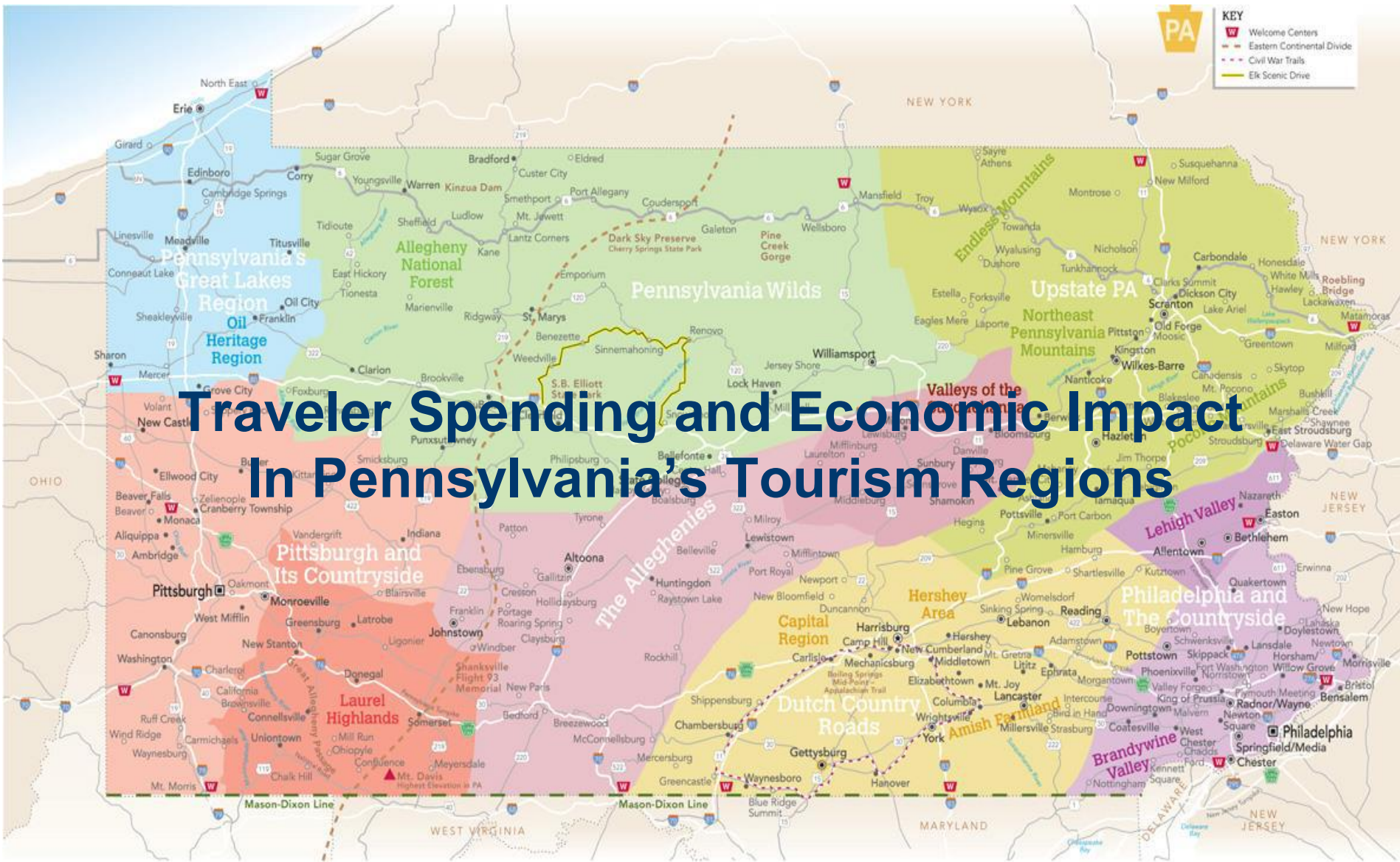
# **Pennsylvania's Tourism Regions**

## **2017 Traveler Spending and Economic Impact By Region and County**



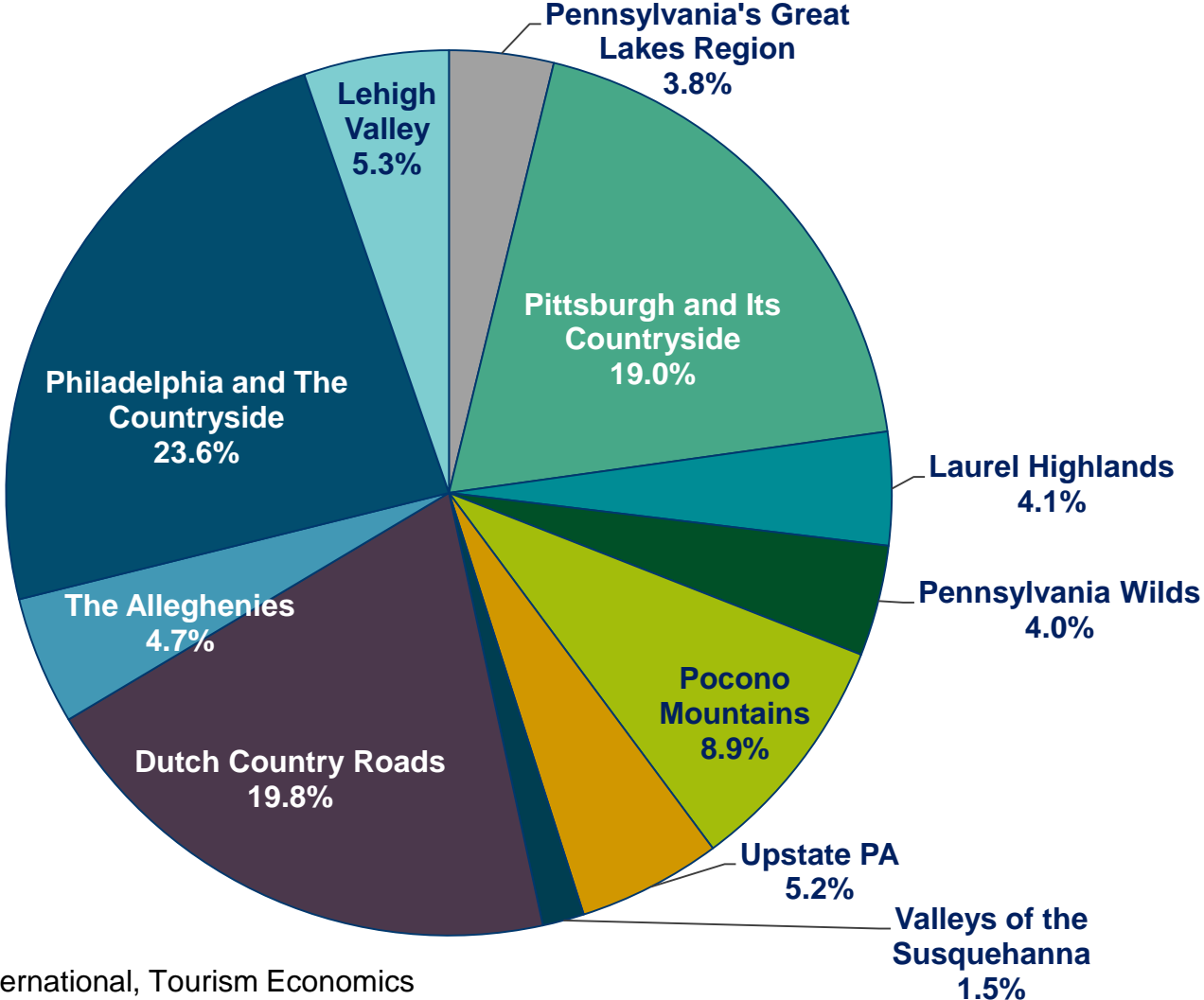
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# Traveler Spending and Economic Impact In Pennsylvania's Tourism Regions

# Share of Total Traveler Spending by PA Region, 2018



Source: Longwoods International, Tourism Economics

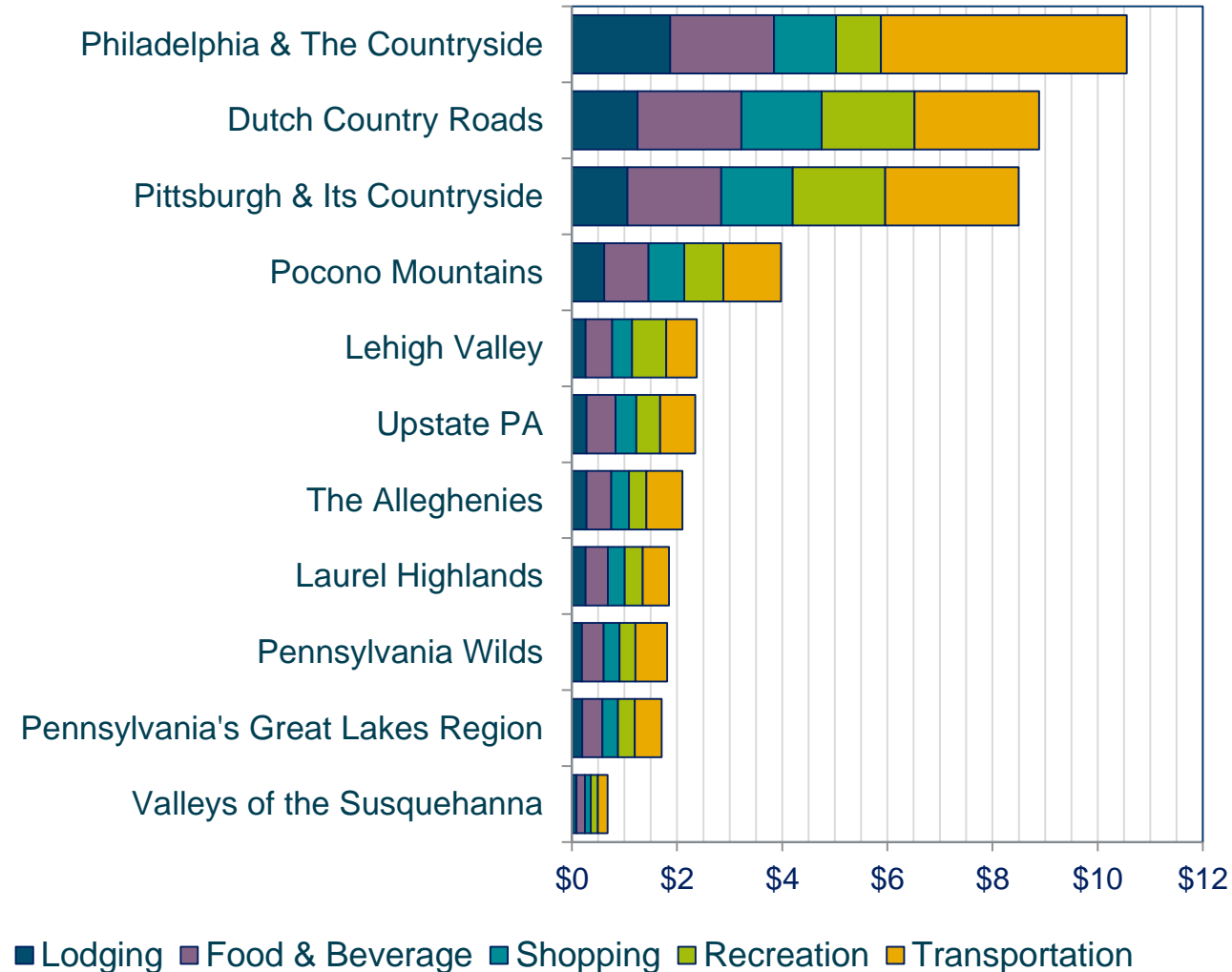


# Traveler Spending in PA Regions by Category, 2018

- As in previous years, travelers to Philadelphia & Its Countryside region spent far more of their travel budgets on transportation than travelers to the state's other tourism regions.
- Travelers reduced the share of their trip budgets going to recreation in 2018, with lodging and food & beverage claiming a larger portion of their trip budgets compared to prior years.
- Travelers to the Lehigh Valley and Pittsburgh regions allocated the highest share of their trip dollars to recreation.

## Traveler Spending by Category and Region

(in billions of U.S. dollars)

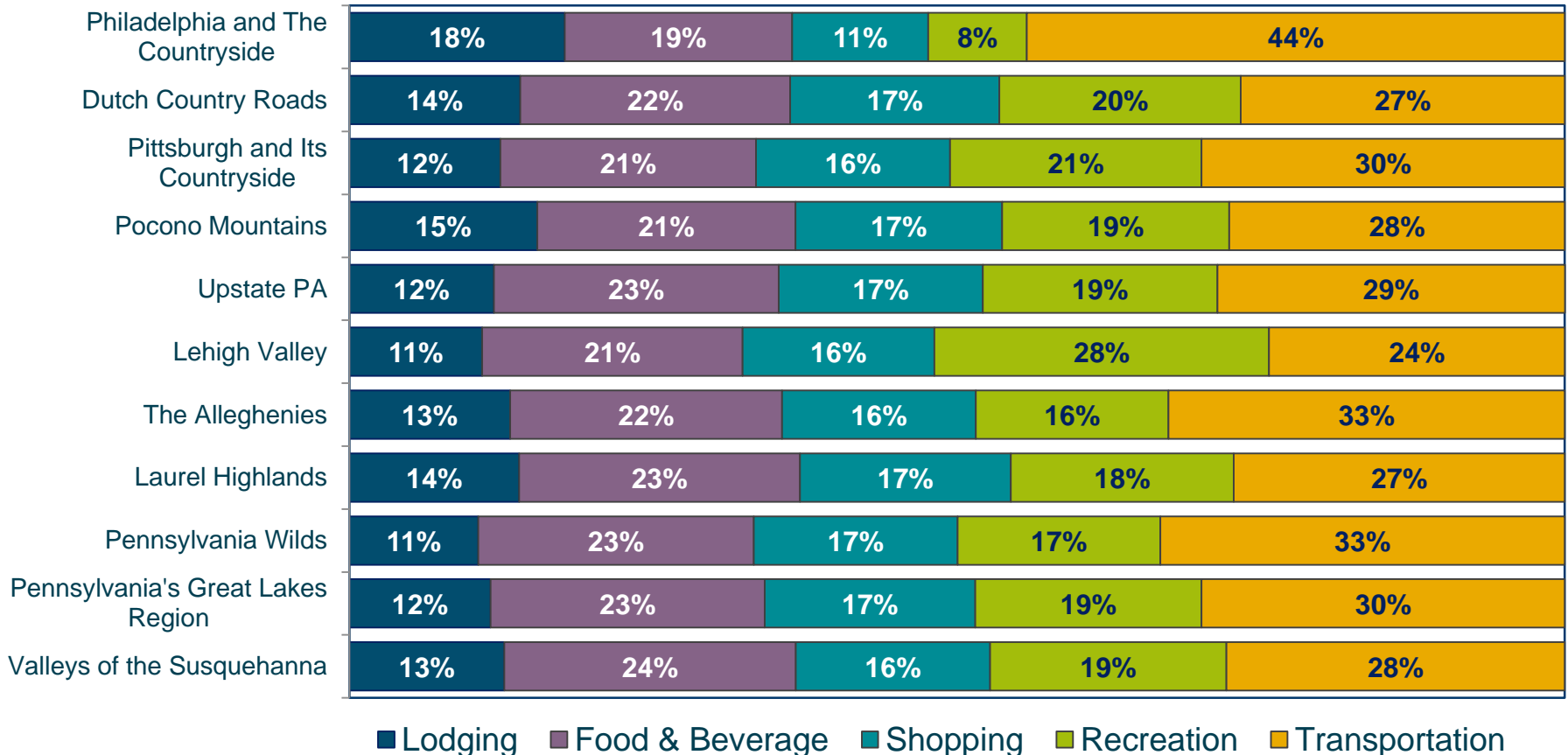


# 2018 Spending by Category -- % of Region Total

- Albeit with certain exceptions, the allocation of trip budgets by travelers and tourists is similar across the regions especially in terms of food & beverage, lodging, and retail (shopping).

## 2018 Traveler Spending by Category and Region

Percent of Region Total



# PA Total Travel ECONOMY Employment & Intensity, 2018

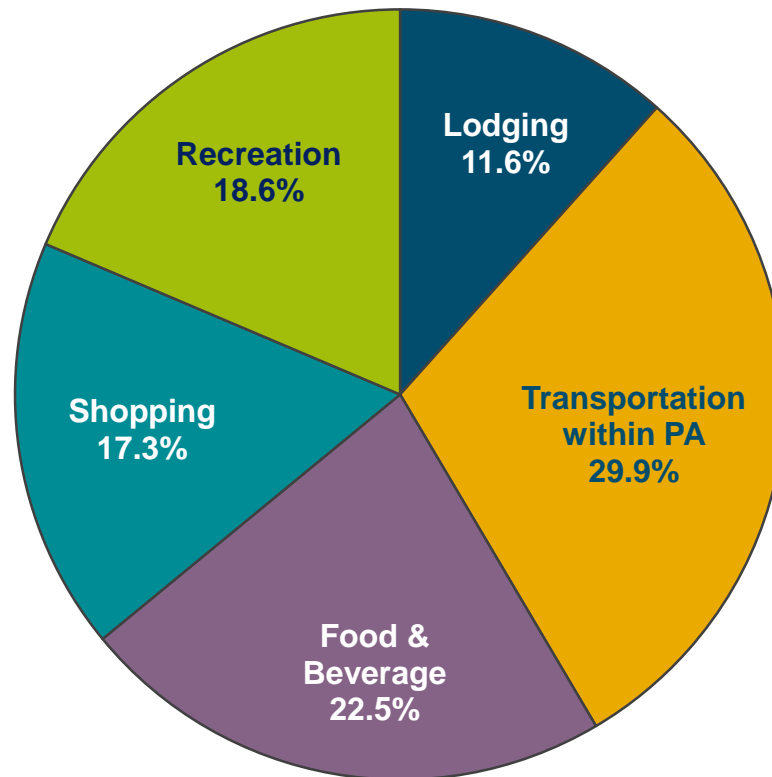
- Travel Employment Intensity is a measure of each county's reliance on the travel industry for jobs. As in prior years, the Philadelphia region continued to have the highest number of travel-related jobs in 2018 with the Pocono Mountains region the most dependent by far on the travel industry as a job provider, distantly followed by the Laurel Highlands, Pennsylvania Wilds, and Dutch Country Roads regions.
- With its highly diverse economic base, the Philadelphia and The Countryside region continued to be the least dependent on travel and tourism for jobs in the region.



# Pennsylvania's Great Lakes Region

- Pennsylvania's Great Lakes region is comprised of Crawford, Erie, Mercer and Venango counties.
- Travelers spent more than \$1.7 billion in the region in 2018 – a 1.1% increase from 2017 and new record high.
- Shopping continued to be a clear draw for travelers to the Pennsylvania Great Lakes Region in 2018, with the region once again ranking second among the state's 11 tourism regions in the share of trip dollars the region's travelers allocated for shopping/retail purchases, while 9<sup>th</sup> in the percentage spent on lodging.

## Pennsylvania's Great Lakes Region 2018 Spending by Category



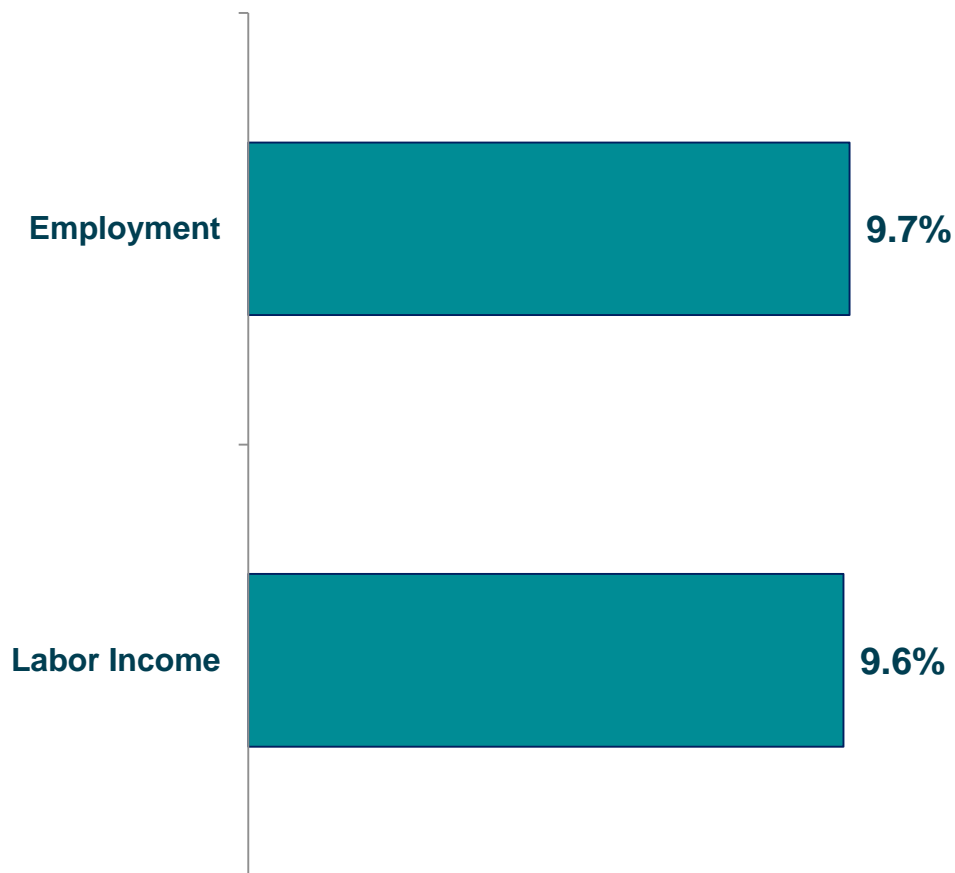
Source: Tourism Economics



# Pennsylvania's Great Lakes Region

- The chart shows the travel economy's share (includes direct, indirect and induced impacts) of the region's total for both labor income and employment.
- The travel industry's share of the region's employment remained at 9.7% in 2018, with the number of travel-related jobs rising slightly (by 0.4%) from 2017.
- The region continued to rank 9<sup>th</sup> in the number of jobs directly supported by tourism among PA's 11 tourism regions, but rose to 4<sup>th</sup> in employment intensity in 2018.

**Travel Industry Share of Regional Economy**



# PA's Great Lakes Region – Traveler Spending & Employment Timelines

## PENNSYLVANIA'S GREAT LAKES REGION TRAVELER SPENDING, 2008 – 2018 (dollar amounts in millions)

County	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Crawford	\$274.9	\$219.7	\$241.5	\$250.8	\$260.3	\$265.6	\$259.0	\$258.1	\$248.1	\$251.7	\$248.6
Erie	876.0	741.2	829.4	897.4	930.7	925.4	941.0	960.9	969.1	988.8	996.5
Mercer	279.8	233.2	256.0	279.7	304.9	319.9	315.9	315.4	307.6	305.7	313.7
Venango	130.2	108.7	118.3	124.0	132.1	130.9	132.5	144.9	139.2	141.1	146.5
Region Total	\$1,560.8	\$1,302.7	\$1,445.2	\$1,551.8	\$1,628.1	\$1,641.9	\$1,648.4	\$1,679.2	\$1,664.0	\$1,687.3	\$1,705.3
% Change	11.6%	-16.5%	10.9%	7.4%	4.9%	0.8%	0.4%	1.9%	-0.9%	1.4%	1.1%

## PENNSYLVANIA'S GREAT LAKES REGION TRAVEL INDUSTRY EMPLOYMENT, 2008 – 2018

County	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Crawford	2,237	2,091	2,160	2,171	2,122	2,150	2,151	2,166	2,156	2,123	2,109
Erie	7,095	6,674	7,004	7,181	7,347	7,516	7,639	7,715	7,768	7,796	7,846
Mercer	2,513	2,343	2,417	2,485	2,557	2,614	2,640	2,627	2,584	2,561	2,561
Venango	1,191	1,113	1,138	1,153	1,143	1,158	1,166	1,188	1,196	1,192	1,214
Region Total	13,036	12,221	12,719	12,989	13,169	13,437	13,596	13,696	13,705	13,672	13,730
% Change	-0.4%	-6.3%	4.1%	2.1%	1.4%	2.0%	1.2%	0.7%	0.1%	-0.2%	0.4%

# PA's Great Lakes Region – Traveler Spending by Category

## PENNSYLVANIA'S GREAT LAKES REGION TRAVELER SPENDING BY CATEGORY, 2017 and 2018 (dollar amounts in millions)

2018	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Crawford	\$16.0	\$61.5	\$42.0	\$38.9	\$90.2	\$248.6
Erie	131.0	222.3	169.8	205.9	267.4	996.5
Mercer	40.2	75.6	63.2	53.4	81.3	313.7
Venango	10.9	25.1	20.7	19.1	70.8	146.5
Region Total	\$198.1	\$384.5	\$295.6	\$317.4	509.7	\$1,705.3
% Change	2.8%	3.0%	0.1%	-0.9%	0.7%	1.1%

2017	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Crawford	\$16.2	\$60.1	\$43.8	\$41.3	\$90.2	\$251.7
Erie	127.7	217.4	168.5	206.8	268.4	988.8
Mercer	38.4	72.0	62.4	53.1	79.8	305.7
Venango	10.3	23.8	20.6	18.9	67.5	141.1
Region Total	\$192.6	\$373.3	\$295.3	\$320.1	505.9	\$1,687.3

# PA's Great Lakes Region – Tourism Satellite Account

## PENNSYLVANIA'S GREAT LAKES REGION TOURISM SATELLITE ACCOUNT CATEGORIES, 2017 and 2018 (dollar amounts in millions)

2018	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Crawford	\$248.6	\$0.4	\$10.3	\$259.3
Erie	996.5	5.3	41.1	1,042.8
Mercer	313.7	0.8	12.9	327.5
Venango	146.5	0.2	6.0	152.8
Region Total	\$1,705.3	\$6.8	\$70.3	\$1,782.4
% Change	1.1%	-0.3%	-2.1%	0.9%

2017	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Crawford	\$251.7	\$0.4	\$10.7	\$262.8
Erie	988.8	5.3	42.1	1,036.2
Mercer	305.7	0.8	13.0	319.6
Venango	141.1	0.2	6.0	147.4
Region Total	\$1,687.3	\$6.8	\$71.8	\$1,765.9

\*Non-Travel Personal Consumption Expenditures represent travel-related consumer durable purchases, such as an RV, boat, or furniture for a vacation house.

# PA's Great Lakes Region – Travel Industry Impacts, 2017 & 2018

## PENNSYLVANIA'S GREAT LAKES REGION TRAVEL INDUSTRY IMPACTS, 2017 and 2018 (dollar amounts in millions)

2018	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Crawford	\$248.6	2,109	\$52.1	\$12.9	\$12.0
Erie	996.5	7,846	223.9	56.8	50.2
Mercer	313.7	2,561	59.4	16.2	14.2
Venango	146.5	1,214	32.2	7.7	7.3
Region Total	\$1,705.3	13,730	\$367.6	\$93.6	\$83.7
% Change	1.1%	0.4%	2.0%	1.6%	3.7%

2017	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Crawford	\$251.7	2,123	\$51.9	\$13.0	\$11.8
Erie	988.8	7,796	218.8	56.0	48.3
Mercer	305.7	2,561	58.3	15.7	13.7
Venango	141.1	1,192	31.5	7.5	6.9
Region Total	\$1,687.3	13,672	\$360.4	\$92.2	\$80.7

# PA's Great Lakes Region –Travel Economy Impacts, 2017 & 2018

## PENNSYLVANIA'S GREAT LAKES REGION TRAVEL ECONOMY IMPACTS, 2017 and 2018 (dollar amounts in millions)

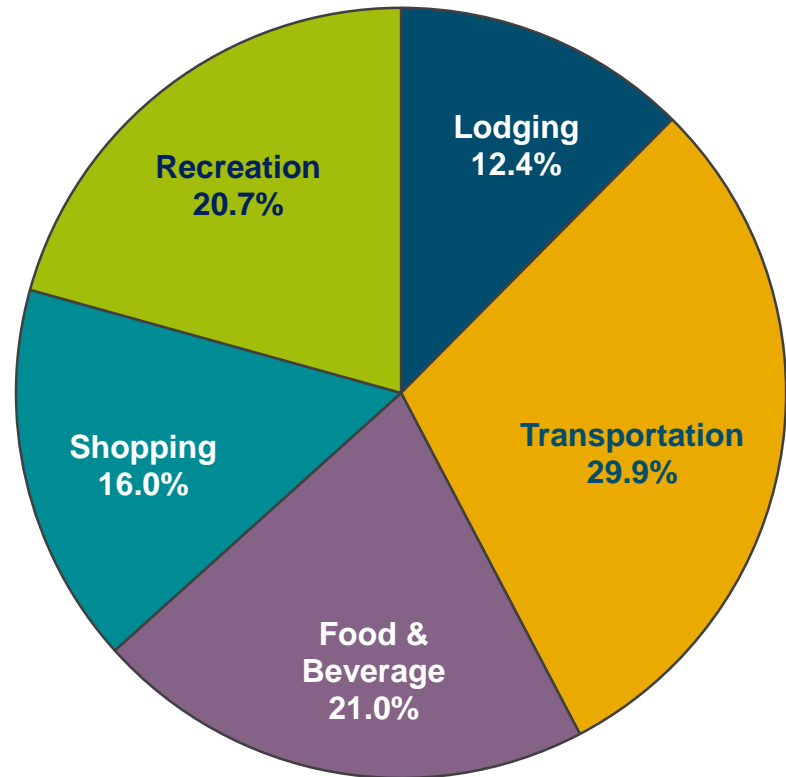
2018	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Crawford	\$259.3	3,309	\$99.3	\$22.7	\$24.1
Erie	1,042.8	11,865	418.6	97.0	101.0
Mercer	327.5	3,931	111.9	28.0	28.6
Venango	152.8	1,887	58.0	13.6	14.7
Region Total	\$1,782.4	20,992	\$687.7	\$161.3	\$168.5
% Change	0.9%	-0.9%	1.3%	1.0%	3.7%

2017	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Crawford	\$262.8	3,366	\$99.0	\$22.9	\$23.7
Erie	1,036.2	11,928	412.3	96.1	97.3
Mercer	319.6	3,994	109.2	27.3	27.5
Venango	147.4	1,886	58.7	13.2	14.0
Region Total	\$1,765.9	21,175	\$679.2	\$159.6	\$162.5

# Pittsburgh & Its Countryside

- Pittsburgh & Its Countryside region is comprised of the following eight counties: Allegheny, Armstrong, Beaver, Butler, Greene, Indiana, Lawrence, and Washington.
- Travelers spent nearly \$8.5 billion in the region in 2018 – a new record high and a 3.9% increase from 2017. The region once again had the third highest level of traveler spending among the state’s 11 tourism regions.
- Recreation remained a big draw for the region’s visitors in 2018 with the region continuing to rank 2<sup>nd</sup> among the state’s tourism regions for both the total amount visitors spent on, and the share of total travel budgets devoted to, recreational purchases.

## Pittsburgh & Its Countryside Region 2018 Spending by Category

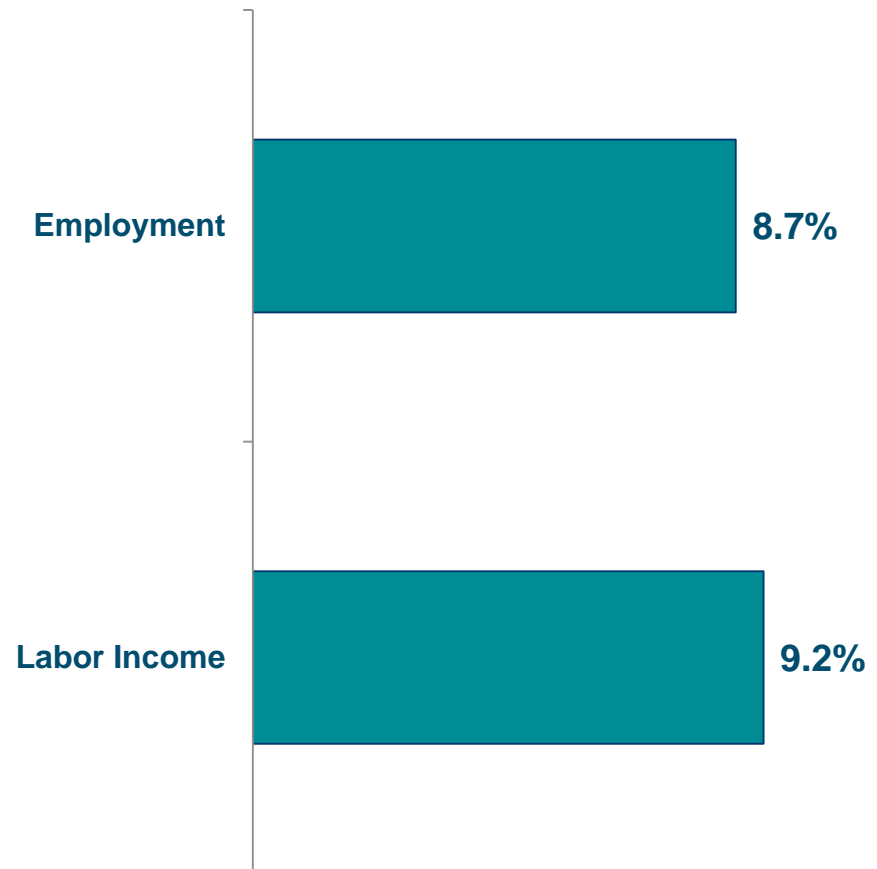


Source: Tourism Economics

# Pittsburgh & Its Countryside

- The chart shows the travel economy's share (including direct, indirect, and induced impacts) of the region's total for both labor income and employment.
- The travel industry's share of the Pittsburgh region's employment fell slightly to 8.7% in 2018, while the industry's share of the region's labor income once again rose 0.2 of a percentage point to 9.0% from 2017's level.
- As in prior years, the region continued to have the 3<sup>rd</sup> highest number of travel-supported jobs of the state's 11 tourism regions and to rank 7<sup>th</sup> in the industry's employment intensity in 2017.

**Travel Industry Share of Regional Economy**





# Pittsburgh & Its Countryside – Traveler Spending & Employment Timelines

## PITTSBURGH AND ITS COUNTRYSIDE TRAVELER SPENDING, 2008 – 2018 (dollar amounts in millions)

County	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Allegheny	\$4,979.8	\$4,354.6	\$4,828.1	\$5,231.2	\$5,494.0	\$5,575.1	\$5,675.2	\$5,987.7	\$5,950.2	\$6,137.9	\$6,379.6
Armstrong	75.3	58.6	71.3	84.0	89.8	91.3	90.8	88.9	88.4	92.4	93.2
Beaver	226.9	196.0	217.2	237.4	244.9	249.8	256.2	267.0	270.5	283.4	292.0
Butler	455.5	406.1	440.6	485.7	578.8	582.1	597.3	604.2	592.1	593.7	613.9
Greene	65.3	58.7	68.9	74.6	80.4	91.9	94.7	89.2	76.1	78.5	83.6
Indiana	152.6	144.5	154.2	169.7	184.3	179.1	175.3	162.0	155.4	162.1	165.7
Lawrence	101.4	83.7	98.6	113.4	118.9	117.9	119.6	120.1	126.5	126.8	130.0
Washington	497.1	482.3	582.7	668.4	740.7	755.3	760.0	747.0	662.7	703.7	737.3
Region Total	\$6,554.1	\$5,784.5	\$6,461.7	\$7,064.4	\$7,531.8	\$7,642.5	\$7,769.2	\$8,066.1	7,921.8	8,178.6	8,495.3
% Change	13.4%	-11.7%	11.7%	9.3%	6.6%	1.5%	1.7%	3.8%	-1.8%	3.2%	3.9%

## PITTSBURGH AND ITS COUNTRYSIDE TRAVEL INDUSTRY EMPLOYMENT, 2008 – 2018

County	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Allegheny	37,591	36,188	37,302	38,112	39,094	39,964	40,254	40,888	41,530	42,295	43,080
Armstrong	530	484	554	559	568	573	576	584	594	608	621
Beaver	2,109	1,977	1,965	1,975	1,997	2,048	2,070	2,096	2,111	2,124	2,157
Butler	3,739	3,664	3,740	3,828	3,941	3,996	4,050	4,048	4,074	4,073	4,162
Greene	417	419	479	479	483	485	488	487	483	486	505
Indiana	1,342	1,347	1,351	1,381	1,427	1,450	1,460	1,426	1,421	1,443	1,484
Lawrence	863	806	873	877	896	907	917	909	927	933	954
Washington	4,995	5,026	5,570	5,740	5,840	5,949	5,953	5,948	5,856	5,875	6,000
Region Total	51,586	49,911	51,834	52,952	54,246	55,374	55,767	56,388	56,995	57,838	58,964
% Change	1.8%	-3.2%	3.9%	2.2%	2.4%	2.1%	0.7%	1.1%	1.1%	1.5%	1.9%

# Pittsburgh & Its Countryside – Traveler Spending by Category

## PITTSBURGH AND ITS COUNTRYSIDE TRAVELER SPENDING BY CATEGORY, 2017 and 2018 (dollar amounts in millions)

2018	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Allegheny	\$824.8	\$1,314.7	\$1,009.0	\$1,316.3	\$1,914.8	\$6,379.6
Armstrong	4.1	19.6	12.3	25.8	31.4	93.2
Beaver	21.9	64.1	45.5	44.9	115.6	292.0
Butler	82.1	141.9	110.4	104.4	175.1	613.9
Greene	11.0	19.8	13.7	14.0	25.1	83.6
Indiana	19.2	42.3	29.2	28.6	46.3	165.7
Lawrence	8.0	30.9	24.3	29.5	37.3	130.0
Washington	85.0	152.7	112.8	193.8	193.1	737.3
Region Total	\$1,056.1	\$1,786.0	\$1,357.1	\$1,757.4	\$2,538.8	8,495.3
% Change	6.3%	5.8%	3.2%	4.2%	1.7%	3.9%

2017	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Allegheny	\$776.4	\$1,243.0	\$973.4	\$1,253.2	\$1,891.9	\$6,137.9
Armstrong	4.1	18.6	12.2	27.2	30.4	92.4
Beaver	20.3	60.0	44.8	44.8	113.5	283.4
Butler	78.8	135.3	108.5	103.2	168.0	593.7
Greene	9.8	18.3	12.9	12.7	24.9	78.5
Indiana	18.1	39.9	29.5	28.4	46.2	162.1
Lawrence	6.9	28.8	23.8	29.9	37.4	126.8
Washington	79.0	144.0	110.1	187.1	183.5	703.7
Region Total	\$993.4	\$1,687.9	\$1,315.1	\$1,686.4	\$2,495.8	8,178.6

# Pittsburgh & Its Countryside – Tourism Satellite Account

## PITTSBURGH AND ITS COUNTRYSIDE TOURISM SATELLITE ACCOUNT CATEGORIES, 2017 and 2018 (dollar amounts in millions)

2018	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Allegheny	\$6,379.6	\$38.0	\$263.1	\$6,680.6
Armstrong	93.2	0.1	3.8	97.1
Beaver	292.0	0.5	12.0	304.6
Butler	613.9	2.2	25.3	641.4
Greene	83.6	0.2	3.4	87.3
Indiana	165.7	0.5	6.8	173.0
Lawrence	130.0	0.2	5.4	135.6
Washington	737.3	1.7	30.4	769.4
Region Total	8,495.3	\$43.5	\$350.3	\$8,889.1
% Change	3.9%	0.1%	0.7%	3.7%

2017	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Allegheny	\$6,137.9	\$38.0	\$261.2	\$6,437.1
Armstrong	92.4	0.1	3.9	96.5
Beaver	283.4	0.5	12.1	296.0
Butler	593.7	2.2	25.3	621.2
Greene	78.5	0.2	3.3	82.1
Indiana	162.1	0.5	6.9	169.5
Lawrence	126.8	0.2	5.4	132.4
Washington	703.7	1.7	29.9	735.3
Region Total	8,178.6	\$43.4	\$348.0	\$8,570.1

\*Non-Travel Personal Consumption Expenditures represent travel-related consumer durable purchases, such as an RV, boat, or furniture for a vacation home.

# Pittsburgh & Its Countryside – Travel Industry Impacts, 2017 & 2018

## PITTSBURGH AND ITS COUNTRYSIDE TRAVEL INDUSTRY IMPACTS, 2017 and 2018 (dollar amounts in millions)

2018	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Allegheny	\$6,379.6	43,080	\$1,761.0	\$400.7	\$366.2
Armstrong	93.2	621	16.8	4.6	4.1
Beaver	292.0	2,157	64.9	15.8	14.6
Butler	613.9	4,162	119.6	32.6	28.5
Greene	83.6	505	12.6	3.9	3.4
Indiana	165.7	1,484	36.8	9.1	8.3
Lawrence	130.0	954	26.9	6.7	6.2
Washington	737.3	6,000	204.1	44.4	42.3
Region Total	8,495.3	58,964	\$2,242.7	\$517.9	\$473.5
% Change	3.9%	1.9%	4.3%	4.6%	6.5%

2017	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Allegheny	\$6,137.9	42,295	\$1,689.8	\$383.7	\$343.8
Armstrong	92.4	608	16.1	4.5	3.9
Beaver	283.4	2,124	62.9	15.1	13.9
Butler	593.7	4,073	115.0	31.2	26.8
Greene	78.5	486	12.1	3.8	3.1
Indiana	162.1	1,443	35.3	8.7	7.8
Lawrence	126.8	933	25.9	6.5	5.9
Washington	703.7	5,875	194.1	41.4	39.5
Region Total	8,178.6	57,838	\$2,151.1	\$494.8	\$444.7

# Pittsburgh & Its Countryside – Travel Economy Impacts, 2017 & 2018

## PITTSBURGH AND ITS COUNTRYSIDE TRAVEL ECONOMY IMPACTS, 2017 and 2018 (dollar amounts in millions)

2018	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Allegheny	\$6,680.6	63,049	\$3,232.1	\$684.5	\$738.5
Armstrong	97.1	1,203	29.5	8.0	8.3
Beaver	304.6	3,672	120.0	27.5	29.4
Butler	641.4	6,458	228.9	56.0	57.3
Greene	87.3	838	21.8	6.8	6.8
Indiana	173.0	2,391	70.3	15.8	16.7
Lawrence	135.6	1,718	49.4	11.8	12.5
Washington	769.4	8,934	373.8	77.1	85.3
Region Total	\$8,889.1	88,261	\$4,125.7	\$887.5	\$954.7
% Change	3.7%	0.5%	2.9%	4.1%	6.4%

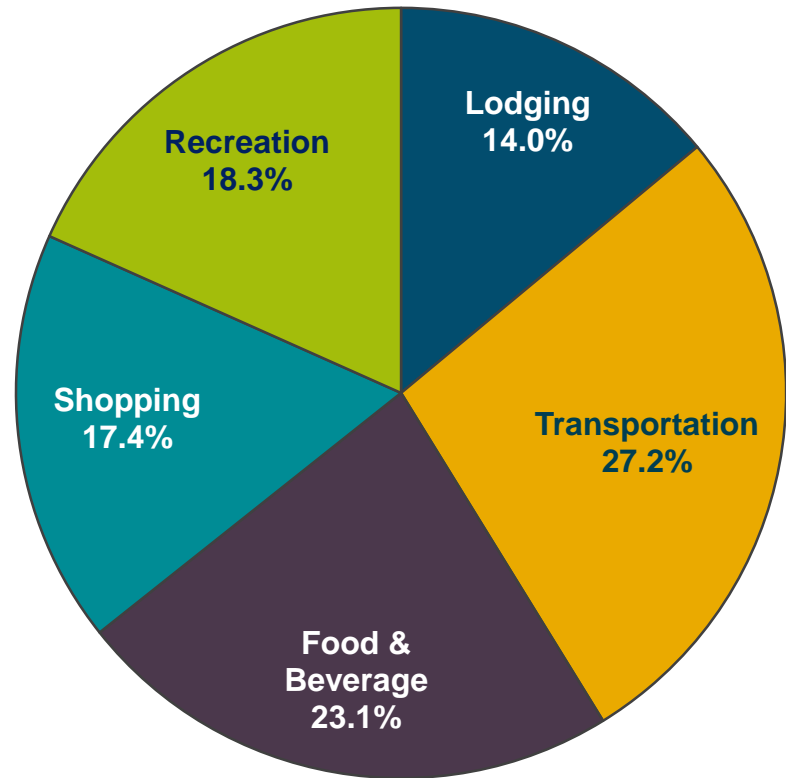
2017	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Allegheny	\$6,437.1	62,718	\$3,144.5	\$657.7	\$693.6
Armstrong	96.5	1,198	29.4	7.9	7.9
Beaver	296.0	3,674	118.3	26.6	27.9
Butler	621.2	6,416	219.0	54.0	54.0
Greene	82.1	841	21.5	6.5	6.3
Indiana	169.5	2,375	67.4	15.3	15.8
Lawrence	132.4	1,713	48.0	11.5	11.9
Washington	735.3	8,926	360.2	72.8	79.6
Region Total	\$8,570.1	87,862	\$4,008.3	\$852.2	\$896.9

# Laurel Highlands

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- The Laurel Highlands in southwestern PA is comprised of the following counties: Fayette, Somerset, and Westmorland.
- Travelers spent close to \$1.85 billion in the region in 2018, – a 1.4% increase and new record high.
- Travelers to the region liked to shop with the region once again posting the highest share of travelers' trip budgets spent on shopping and the third highest share on food & beverage purchases among the state's 11 tourism regions in 2018.

## Laurel Highlands Region 2018 Spending by Category

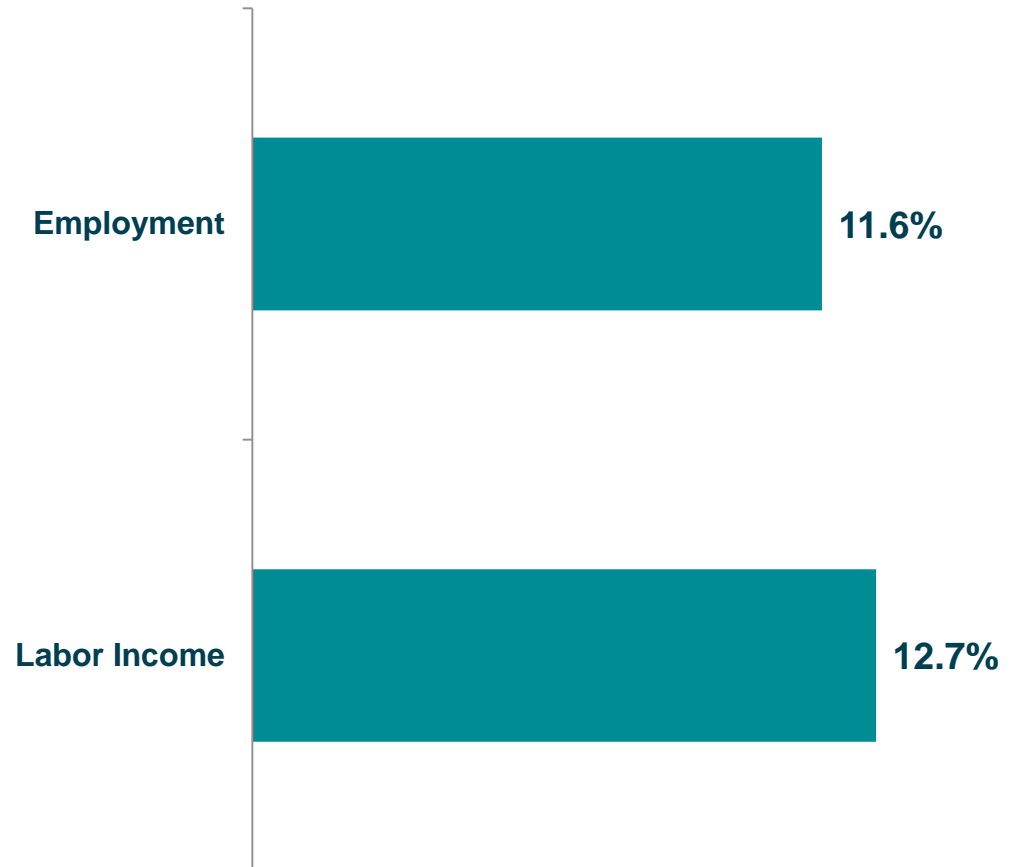


Source: Tourism Economics

# Laurel Highlands

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- The travel industry supported 11.4% of regional employment in 2018 – a small drop from the prior year. The region continued to have the second highest percentage of travel-supported jobs among the state's 11 tourism regions and to rank 7<sup>th</sup> in the actual number of travel-supported jobs.
- The travel industry's share of the Laurel Highlands region's total labor income remained at 12.7% in 2018 despite the small (0.2%) drop in travel-related jobs.

**Travel Industry Share of Regional Economy**



# Laurel Highlands – Traveler Spending & Employment Timelines

## LAUREL HIGHLANDS TRAVELER SPENDING, 2008 – 2018 (dollar amounts in millions)

County	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Fayette	\$618.4	\$538.2	\$595.7	\$636.0	\$643.9	\$663.8	\$677.5	\$667.2	\$661.5	\$684.8	\$690.2
Somerset	357.2	306.9	330.1	371.0	378.7	380.2	387.7	399.9	377.3	392.0	398.7
Westmoreland	706.4	587.6	651.6	724.7	745.9	742.6	772.2	753.9	721.1	745.4	758.5
Region Total	\$1,682.0	\$1,432.6	\$1,577.3	\$1,731.7	\$1,768.5	\$1,786.6	\$1,837.4	\$1,821.1	\$1,759.9	\$1,822.2	\$1,847.3
% Change	11.2%	-14.8%	10.1%	9.8%	2.1%	1.0%	2.8%	-0.9%	-3.4%	3.5%	1.4%

## LAUREL HIGHLANDS TRAVEL INDUSTRY EMPLOYMENT, 2008 – 2018

County	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Fayette	5,241	5,047	5,219	5,295	5,417	5,808	5,836	5,834	5,852	5,914	5,821
Somerset	3,449	3,255	3,234	3,257	3,193	3,285	3,331	3,322	3,233	3,261	3,281
Westmoreland	5,582	5,243	5,369	5,476	5,632	5,716	5,764	5,661	5,649	5,703	5,744
Region Total	14,272	13,544	13,822	14,028	14,242	14,809	14,932	14,817	14,735	14,878	14,846
% Change	0.2%	-5.1%	2.1%	1.5%	1.5%	4.0%	0.8%	-0.8%	-0.6%	1.0%	-0.2%



# Laurel Highlands – Traveler Spending by Category

## LAUREL HIGHLANDS TRAVELER SPENDING BY CATEGORY, 2017 and 2018 (dollar amounts in millions)

2018	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Fayette	\$125.1	\$160.2	\$114.8	\$132.2	\$157.9	\$690.2
Somerset	57.8	94.3	64.0	70.3	112.3	398.7
Westmoreland	75.1	172.4	141.9	136.0	233.1	758.5
Region Total	\$258.0	\$426.8	\$320.7	\$338.5	\$503.3	\$1,847.3
% Change	3.3%	3.8%	0.4%	-1.1%	0.8%	1.4%

2017	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Fayette	\$121.8	\$155.6	\$114.2	\$135.0	\$158.2	\$684.8
Somerset	54.9	90.1	63.7	71.8	111.5	392.0
Westmoreland	72.9	165.4	141.6	135.7	229.8	745.4
Region Total	\$249.6	\$411.0	\$319.5	\$342.5	\$499.5	\$1,822.2

# Laurel Highlands – Tourism Satellite Account

## LAUREL HIGHLANDS TOURISM SATELLITE ACCOUNT CATEGORIES, 2017 and 2018 (dollar amounts in millions)

2018	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Fayette	\$690.2	\$1.5	\$28.5	\$720.1
Somerset	398.7	0.9	16.4	416.0
Westmoreland	758.5	1.9	31.3	791.6
Region Total	\$1,847.3	\$4.3	\$76.2	\$1,927.8
% Change	1.4%	-0.4%	-1.8%	1.2%

2017	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Fayette	\$684.8	\$1.5	\$29.1	\$715.4
Somerset	392.0	1.0	16.7	409.6
Westmoreland	745.4	1.9	31.7	779.0
Region Total	\$1,822.2	\$4.3	\$77.5	\$1,904.0

\*Non-Travel Personal Consumption Expenditures represent travel-related consumer durable purchases, such as an RV, boat, or furniture for a vacation home.

# Laurel Highlands – Travel Industry Impacts, 2017 & 2018

## LAUREL HIGHLANDS TRAVEL INDUSTRY IMPACTS, 2017 and 2018 (dollar amounts in millions)

2018	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Fayette	\$690.2	5,821	\$178.8	\$39.8	\$37.9
Somerset	398.7	3,281	94.6	22.3	20.7
Westmoreland	758.5	5,744	151.7	39.5	35.5
Region Total	\$1,847.3	14,846	\$425.1	\$101.7	\$94.2
% Change	1.4%	-0.2%	0.7%	2.1%	3.0%

2017	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Fayette	\$661.5	5,914	\$180.6	\$39.3	\$37.3
Somerset	377.3	3,261	92.8	21.6	20.0
Westmoreland	721.1	5,703	148.5	38.6	34.2
Region Total	\$1,759.9	14,878	\$422.0	\$99.6	\$91.5

# Laurel Highlands – Travel Economy Impacts, 2017 & 2018

## LAUREL HIGHLANDS TRAVEL ECONOMY IMPACTS, 2017 and 2018 (dollar amounts in millions)

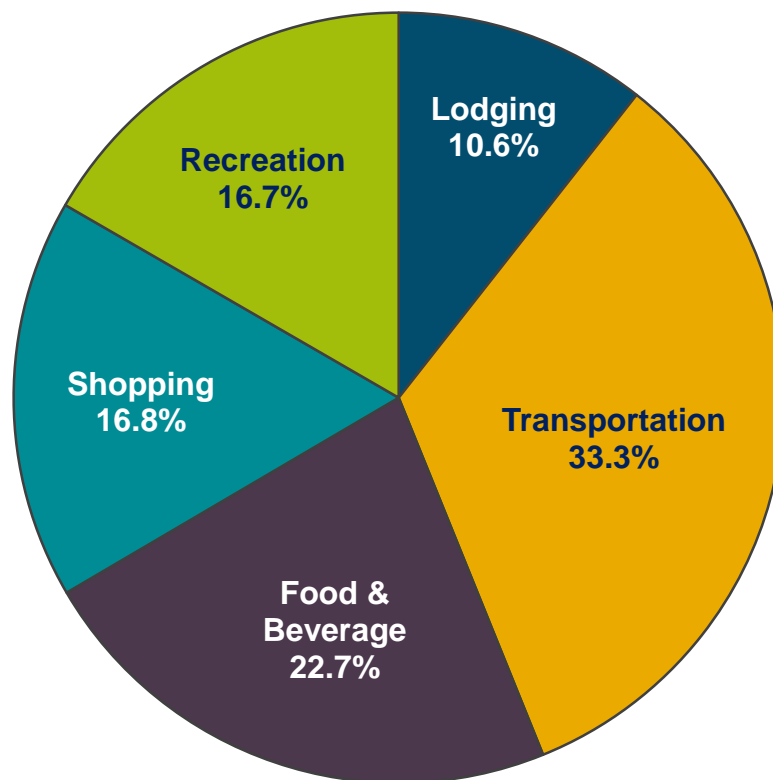
2018	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Fayette	\$720.1	8,216	\$335.4	\$69.5	\$76.5
Somerset	416.0	4,692	173.8	38.8	41.8
Westmoreland	791.6	9,582	290.8	68.6	71.4
Region Total	\$1,927.8	22,491	\$800.0	\$176.9	\$189.7
% Change	1.2%	-1.2%	0.4%	1.2%	2.9%

2017	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Fayette	\$715.4	8,396	\$340.2	\$69.3	\$75.2
Somerset	409.6	4,754	175.4	38.0	40.2
Westmoreland	779.0	9,617	281.2	67.6	68.9
Region Total	\$1,904.0	22,768	\$796.8	\$174.8	\$184.3

# Pennsylvania Wilds

- The Pennsylvania Wilds region is comprised of the following northern tier counties: Cameron, Clarion, Clearfield, Clinton, Elk, Forest, Jefferson, Lycoming, McKean, Potter, Tioga, and Warren.
- Travelers spent more than \$1.8 billion in the Pennsylvania Wilds region in 2018 – a 2.2% increase from 2017 and new record high.
- As in prior years, travelers to the region spent a relatively large share of their trip budgets on transportation and small proportion on lodging, with the region ranking 2<sup>nd</sup> and 11<sup>th</sup>, respectively, among the state's 11 tourism regions for these spending categories.

## Pennsylvania Wilds Region 2018 Spending by Category

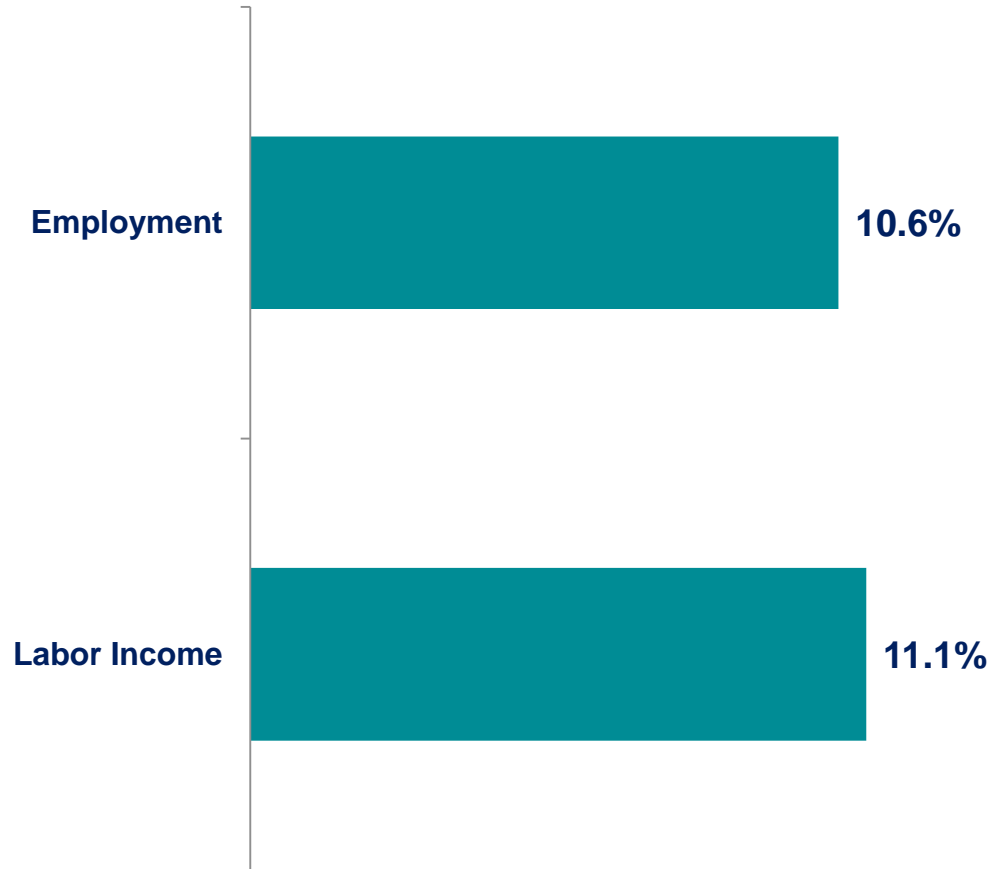


Source: Tourism Economics

# Pennsylvania Wilds

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- The travel industry accounted for a 10.6% share of the region's employment in 2018 – a small, 0.1 percentage point drop from the prior year, despite the 1.2% increase in the number of travel-related jobs.
- The Pennsylvania Wilds travel industry continued to provide 11.1% of the labor income earned in the region in 2018 – a proportion that remained above the industry's share of the region's employment.

**Travel Industry Share of Regional Economy**



# Pennsylvania Wilds – Traveler Spending Timeline

## PENNSYLVANIA WILDS TRAVELER SPENDING, 2008 – 2018 (dollar amounts in millions)

County	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Cameron	\$9.3	\$7.8	\$9.0	\$9.5	\$9.6	\$9.6	\$9.4	\$9.7	\$10.1	\$10.1	\$10.0
Clarion	112.0	93.5	108.1	112.5	118.6	121.5	115.4	117.7	118.9	125.5	123.3
Clearfield	250.3	212.3	248.9	261.8	264.3	265.5	276.5	270.0	266.1	277.3	292.7
Clinton	123.2	108.0	136.6	151.4	153.9	150.6	147.5	147.7	140.5	149.9	152.4
Elk	57.9	47.2	52.3	61.4	66.1	66.0	69.3	74.7	77.9	80.2	79.2
Forest	21.2	18.5	20.4	23.7	22.6	23.4	23.2	27.0	26.3	27.2	27.1
Jefferson	97.8	82.2	102.9	109.9	113.6	115.1	115.1	119.1	116.0	124.1	121.9
Lycoming	293.1	269.3	308.7	384.4	398.2	405.9	391.3	382.5	370.6	379.3	392.1
McKean	138.9	123.2	158.9	164.0	173.4	174.5	174.7	174.6	172.9	180.0	183.4
Potter	29.3	27.0	30.1	36.6	34.3	34.5	35.4	38.8	37.7	40.2	38.9
Tioga	159.1	139.5	171.2	192.3	193.4	187.6	190.9	195.2	193.3	193.5	201.4
Warren	157.8	137.7	149.3	162.5	169.4	169.3	173.8	178.6	182.2	186.8	190.2
Region Total	\$1,450.1	\$1,266.2	\$1,496.4	\$1,670.0	\$1,717.3	\$1,723.4	\$1,722.4	\$1,735.6	\$1,712.4	\$1,774.1	\$1,812.7
% Change	10.4%	-12.7%	18.2%	11.6%	2.8%	0.4%	-0.1%	0.8%	-1.3%	3.6%	2.2%

# Pennsylvania Wilds – Employment Timeline

## PENNSYLVANIA WILDS TRAVEL INDUSTRY EMPLOYMENT, 2008 – 2018

County	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Cameron	79	73	74	75	75	76	76	76	77	77	78
Clarion	963	899	972	993	1,022	1,046	1,051	1,071	1,110	1,114	1,127
Clearfield	1,623	1,594	1,770	1,793	1,775	1,778	1,817	1,799	1,812	1,836	1,869
Clinton	835	798	952	990	993	1,040	1,045	1,064	1,069	1,073	1,090
Elk	496	462	488	509	531	554	557	573	591	596	601
Forest	131	124	135	136	137	137	138	138	139	139	140
Jefferson	732	683	747	762	785	804	807	821	816	828	839
Lycoming	2,573	2,538	2,707	2,790	2,901	2,973	2,961	2,952	2,930	2,951	2,989
McKean	997	943	1,112	1,130	1,114	1,138	1,144	1,164	1,166	1,197	1,203
Potter	197	195	206	216	229	241	242	246	245	253	257
Tioga	1,253	1,215	1,387	1,451	1,462	1,530	1,535	1,573	1,623	1,630	1,640
Warren	1,154	1,123	1,133	1,149	1,120	1,141	1,147	1,156	1,167	1,177	1,189
Region Total	11,032	10,648	11,684	11,993	12,142	12,456	12,519	12,632	12,745	12,872	13,021
% Change	1.0%	-3.5%	9.7%	2.6%	1.2%	2.6%	0.5%	0.9%	0.9%	1.0%	1.2%



# Pennsylvania Wilds – Traveler spending by category, 2018

## PENNSYLVANIA WILDS TRAVELER SPENDING BY CATEGORY, 2018 (dollar amounts in millions)

2018	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Cameron	\$0.6	\$2.0	\$1.7	\$2.6	\$3.0	\$10.0
Clarion	15.5	29.2	21.6	22.2	34.8	123.3
Clearfield	30.2	65.5	54.3	48.7	94.0	292.7
Clinton	13.9	35.4	24.1	26.6	52.5	152.4
Elk	10.1	20.3	14.7	13.2	21.0	79.2
Forest	4.2	5.8	5.2	4.9	7.0	27.1
Jefferson	9.0	23.0	17.3	21.1	51.4	121.9
Lycoming	52.1	96.6	65.2	58.5	119.8	392.1
McKean	19.1	38.8	27.7	30.0	67.8	183.4
Potter	5.5	8.5	6.8	6.7	11.5	38.9
Tioga	23.1	46.6	34.0	36.1	61.6	201.4
Warren	8.8	39.3	31.6	31.4	79.1	190.2
Region Total	\$192.1	\$410.9	\$304.3	\$302.0	\$603.4	\$1,812.7
% Change	5.1%	5.2%	1.2%	-0.8%	1.3%	2.2%

# Pennsylvania Wilds –Traveler spending by category, 2017

## PENNSYLVANIA WILDS TRAVELER SPENDING BY CATEGORY, 2017 (dollar amounts in millions)

2017	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Cameron	\$0.6	\$1.9	\$1.8	\$2.7	\$3.1	\$10.1
Clarion	15.9	28.5	22.3	23.8	35.0	125.5
Clearfield	27.4	60.7	52.5	46.3	90.4	277.3
Clinton	13.6	33.9	24.0	26.6	51.8	149.9
Elk	10.3	19.9	14.9	13.8	21.4	80.2
Forest	4.2	5.7	5.3	5.0	7.1	27.2
Jefferson	9.8	22.8	17.8	22.3	51.3	124.1
Lycoming	46.7	90.7	63.4	59.8	118.7	379.3
McKean	18.8	37.1	27.1	30.1	67.0	180.0
Potter	5.9	8.5	6.9	7.2	11.7	40.2
Tioga	21.4	43.5	33.4	35.3	59.9	193.5
Warren	8.1	37.6	31.3	31.6	78.1	186.8
Region Total	\$182.8	\$390.8	\$300.6	\$304.5	\$595.5	\$1,774.1

# Pennsylvania Wilds – Tourism Satellite Account, 2018

<b>PENNSYLVANIA WILDS                      TOURISM SATELLITE ACCOUNT CATEGORIES, 2018</b> (dollar amounts in millions)				
<b>2018</b>	<b>Traveler Spending</b>	<b>Government Expenditures</b>	<b>Investment &amp; Non-Travel Personal Consumption Expenditures*</b>	<b>Total Travel Demand</b>
Cameron	\$10.0	\$0.0	\$0.4	\$10.4
Clarion	123.3	0.3	5.1	128.7
Clearfield	292.7	0.7	12.1	305.5
Clinton	152.4	0.4	6.3	159.1
Elk	79.2	0.2	3.3	82.7
Forest	27.1	0.1	1.1	28.3
Jefferson	121.9	0.2	5.0	127.1
Lycoming	392.1	1.0	16.2	409.2
McKean	183.4	0.4	7.6	191.4
Potter	38.9	0.1	1.6	40.6
Tioga	201.4	0.4	8.3	210.1
Warren	190.2	0.2	7.8	198.3
<b>Region Total</b>	<b>\$1,812.7</b>	<b>\$3.9</b>	<b>\$74.7</b>	<b>\$1,891.3</b>
<b>% Change</b>	<b>2.2%</b>	<b>-0.3%</b>	<b>-1.0%</b>	<b>2.0%</b>

\*Non-Travel Personal Consumption Expenditures represent travel-related consumer durable purchases, such as an RV, boat, or furniture for a vacation home.

# Pennsylvania Wilds – Tourism Satellite Account, 2017

<b>PENNSYLVANIA WILDS</b> <b>TOURISM SATELLITE ACCOUNT CATEGORIES, 2017</b> (dollar amounts in millions)				
2017	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Cameron	\$10.1	\$0.0	\$0.4	\$10.6
Clarion	125.5	0.3	5.3	131.1
Clearfield	277.3	0.7	11.8	289.7
Clinton	149.9	0.4	6.4	156.6
Elk	80.2	0.2	3.4	83.8
Forest	27.2	0.1	1.2	28.5
Jefferson	124.1	0.2	5.3	129.6
Lycoming	379.3	1.0	16.1	396.4
McKean	180.0	0.4	7.7	188.1
Potter	40.2	0.1	1.7	42.0
Tioga	193.5	0.4	8.2	202.2
Warren	186.8	0.2	7.9	195.0
Region Total	\$1,774.1	\$3.9	\$75.5	\$1,853.5

\*Non-Traveler Personal Consumption Expenditures represent travel-related consumer durable purchases, such as an RV, boat, or furniture for a vacation home.

# Pennsylvania Wilds –Travel Industry Impacts, 2018

## PENNSYLVANIA WILDS TRAVEL INDUSTRY IMPACTS, 2018 (dollar amounts in millions)

2018	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Cameron	\$10.0	78	\$1.5	\$0.5	\$0.4
Clarion	123.3	1,127	27.4	6.6	6.2
Clearfield	292.7	1,869	55.4	14.8	13.3
Clinton	152.4	1,090	29.6	7.9	7.0
Elk	79.2	601	13.2	3.9	3.4
Forest	27.1	140	3.9	1.2	1.1
Jefferson	121.9	839	25.8	6.4	5.9
Lycoming	392.1	2,989	84.2	21.4	19.2
McKean	183.4	1,203	33.7	9.3	8.2
Potter	38.9	257	6.2	1.9	1.6
Tioga	201.4	1,640	44.6	11.1	10.1
Warren	190.2	1,189	29.8	8.9	7.8
Region Total	\$1,812.7	13,021	\$355.3	\$94.0	\$84.2
% Change	2.2%	1.2%	2.2%	3.5%	4.4%

# Pennsylvania Wilds –Travel Industry Impacts, 2017

## PENNSYLVANIA WILDS TRAVEL INDUSTRY IMPACTS, 2017 (dollar amounts in millions)

2017	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Cameron	\$10.1	77	\$1.5	\$0.5	\$0.4
Clarion	125.5	1,114	26.6	6.6	6.0
Clearfield	277.3	1,836	53.2	14.1	12.5
Clinton	149.9	1,073	29.5	7.7	6.8
Elk	80.2	596	13.1	3.9	3.3
Forest	27.2	139	3.9	1.3	1.0
Jefferson	124.1	828	25.5	6.4	5.8
Lycoming	379.3	2,951	81.2	20.2	18.2
McKean	180.0	1,197	33.4	9.0	7.9
Potter	40.2	253	6.1	1.9	1.6
Tioga	193.5	1,630	44.4	10.5	9.7
Warren	186.8	1,177	29.4	8.7	7.5
Region Total	\$1,774.1	12,872	\$347.8	\$90.8	\$80.7

# Pennsylvania Wilds –Travel Economy Impacts, 2018

## PENNSYLVANIA WILDS TRAVEL ECONOMY IMPACTS, 2018 (dollar amounts in millions)

2018	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Cameron	\$10.4	131	\$2.7	\$0.8	\$0.8
Clarion	128.7	1,760	54.1	11.6	12.4
Clearfield	305.5	2,960	102.0	25.8	26.8
Clinton	159.1	1,678	55.6	13.7	14.2
Elk	82.7	964	25.1	6.8	6.8
Forest	28.3	234	7.2	2.2	2.1
Jefferson	127.1	1,390	47.1	11.2	11.9
Lycoming	409.2	4,551	153.8	37.0	38.7
McKean	191.4	1,823	61.6	16.1	16.5
Potter	40.6	425	11.4	3.3	3.2
Tioga	210.1	2,411	79.4	19.2	20.2
Warren	198.3	1,834	56.2	15.6	15.7
Region Total	\$1,891.3	20,162	\$656.3	\$163.2	\$169.5
% Change	2.0%	-0.1%	0.4%	2.4%	4.4%

# Pennsylvania Wilds –Travel Economy Impacts, 2017

## PENNSYLVANIA WILDS TRAVEL ECONOMY IMPACTS, 2017 (dollar amounts in millions)

2017	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Cameron	\$10.6	131	\$2.8	\$0.8	\$0.8
Clarion	131.1	1,749	52.0	11.6	12.0
Clearfield	289.7	2,949	100.1	24.8	25.1
Clinton	156.6	1,677	55.9	13.5	13.7
Elk	83.8	966	25.1	6.8	6.6
Forest	28.5	235	7.3	2.2	2.1
Jefferson	129.6	1,392	47.7	11.3	11.7
Lycoming	396.4	4,570	151.5	35.3	36.6
McKean	188.1	1,834	62.4	15.8	16.0
Potter	42.0	425	11.7	3.3	3.2
Tioga	202.2	2,412	81.5	18.5	19.5
Warren	195.0	1,842	55.7	15.4	15.1
Region Total	\$1,853.5	20,182	\$653.7	\$159.3	\$162.4

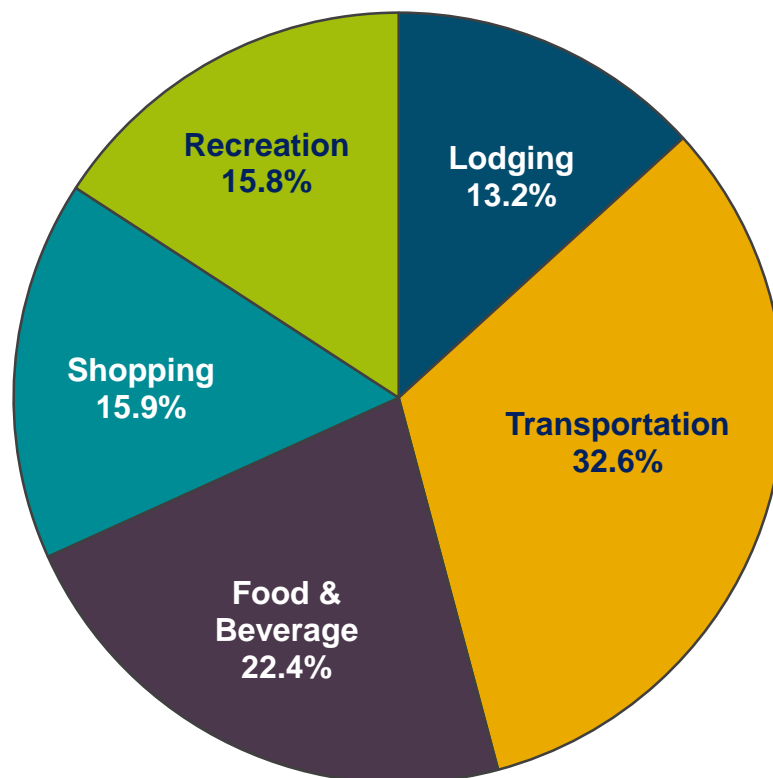


# The Alleghenies

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- The Alleghenies is comprised of the following counties: Bedford, Blair, Cambria, Centre, Fulton, Huntingdon, Juniata, and Mifflin.
- Travelers spent \$2.1 billion in The Alleghenies region in 2018 – a 1.6% increase from 2017 and new record high.
- Visitors to the region continued to spend a relatively high percentage of their trip dollars on transportation – ranking third among the state’s tourism regions in the share of dollars spent on this category, and far less on shopping and recreation purchases with rankings of 9<sup>th</sup> and 10<sup>th</sup>, respectively, in 2018.

## The Alleghenies Region 2018 Spending by Category



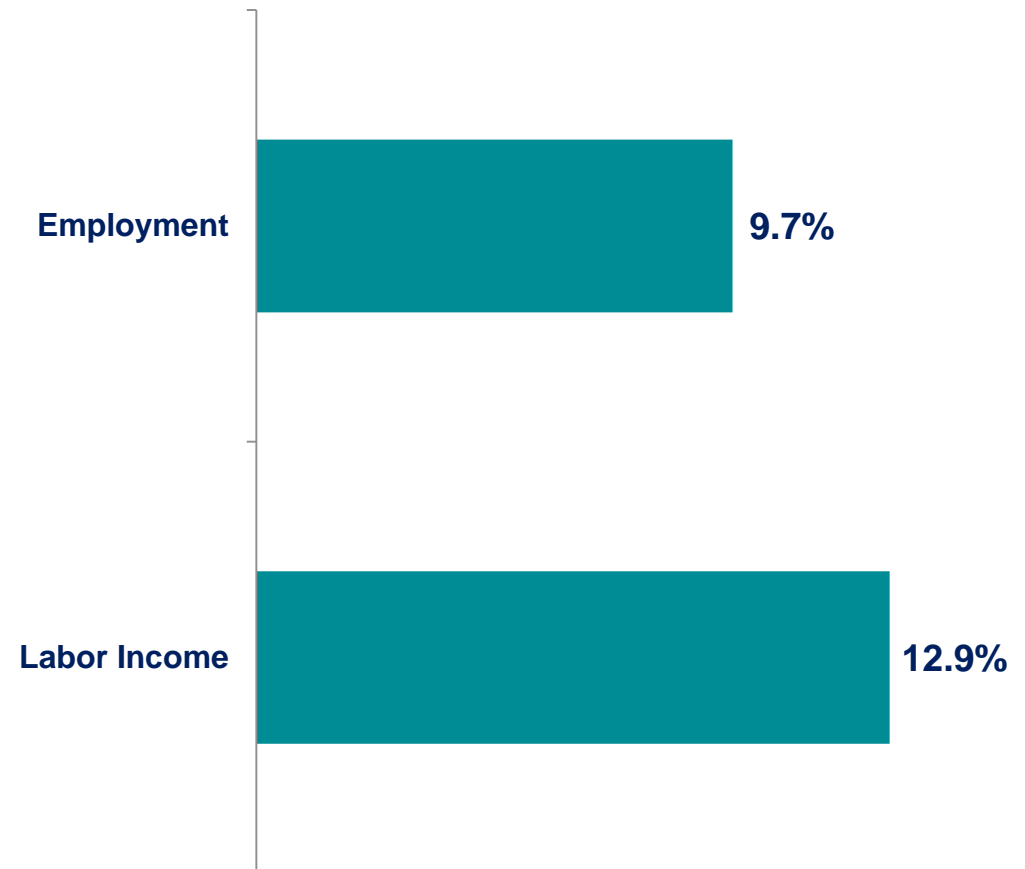
Source: Tourism Economics

# The Alleghenies

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- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- The travel industry continued to be responsible for 9.7% of the region's employment share – unchanged from 2016 and 2017, and 12.9% of the labor income generated in the region, a 0.2 percentage point increase.
- The region ranked 8<sup>th</sup> among the state's tourism regions in the number of jobs supported by the travel and tourism industry, but 5<sup>th</sup> in employment intensity (i.e., the percentage of travel-supported jobs relative to the region's total employment number).

**Travel Industry Share of Regional Economy**



# The Alleghenies – Traveler Spending & Employment Timelines

## THE ALLEGHENIES TRAVELER SPENDING, 2008 – 2018

County	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Bedford	\$286.0	\$239.0	\$263.0	\$274.7	\$280.2	\$282.9	\$283.9	\$284.9	\$287.3	\$297.4	\$308.4
Blair	296.8	249.3	271.2	295.3	307.4	309.6	312.9	324.9	335.2	358.0	358.1
Cambria	280.9	238.5	257.6	290.5	303.4	301.0	302.9	308.1	310.9	315.8	316.4
Centre	616.4	545.6	588.7	649.3	654.3	694.1	720.2	741.8	748.4	794.2	809.1
Fulton	22.4	17.4	19.3	21.7	23.7	23.5	23.2	23.3	23.5	24.7	25.3
Huntingdon	146.6	129.1	144.1	153.1	162.8	161.7	160.4	163.9	166.5	173.0	176.6
Juniata	33.4	28.5	31.0	34.8	36.3	36.8	36.5	37.2	36.7	36.7	36.8
Mifflin	67.0	54.4	58.9	62.8	63.5	64.9	65.2	65.2	65.3	66.4	69.4
Region Total	\$1,749.6	\$1,501.9	\$1,633.9	\$1,782.3	\$1,831.6	\$1,874.4	\$1,905.2	\$1,949.2	\$1,973.7	\$2,066.1	\$2,100.0
% Change	12.1%	-14.2%	8.8%	9.1%	2.8%	2.3%	1.6%	2.3%	1.3%	4.7%	1.6%

## THE ALLEGHENIES TRAVEL INDUSTRY EMPLOYMENT, 2008 – 2018

County	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Bedford	2,151	1,977	2,026	2,015	1,967	1,978	2,004	2,042	2,054	2,080	2,174
Blair	2,582	2,446	2,499	2,544	2,554	2,609	2,588	2,665	2,758	2,796	2,779
Cambria	2,109	2,021	2,005	2,021	2,064	2,053	2,042	2,025	2,061	2,047	2,076
Centre	4,782	4,641	4,705	4,765	4,835	4,923	4,875	4,935	5,004	5,049	5,120
Fulton	154	143	152	152	154	155	156	158	161	167	174
Huntingdon	1,244	1,221	1,273	1,308	1,292	1,329	1,335	1,356	1,394	1,421	1,444
Juniata	251	239	218	219	222	223	224	226	231	232	233
Mifflin	610	567	583	589	598	605	608	618	641	651	663
Region Total	13,883	13,254	13,460	13,614	13,687	13,876	13,833	14,024	14,306	14,443	14,665
% Change	1.6%	-4.5%	1.6%	1.1%	0.5%	1.4%	-0.3%	1.4%	2.0%	0.9%	1.5%

# The Alleghenies – Traveler Spending by Category

## THE ALLEGHENIES TRAVELER SPENDING BY CATEGORY, 2017 and 2018 (dollar amounts in millions)

2018	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Bedford	\$47.9	\$64.3	\$46.8	\$49.4	\$100.0	\$308.4
Blair	35.2	77.2	58.2	55.8	131.7	358.1
Cambria	25.8	65.5	48.2	50.5	126.4	316.4
Centre	143.9	189.1	131.0	120.7	224.4	809.1
Fulton	2.4	5.7	4.4	4.6	8.1	25.3
Huntingdon	15.0	41.1	28.3	33.5	58.7	176.6
Juniata	1.4	8.7	6.3	7.4	12.9	36.8
Mifflin	6.2	18.5	11.6	10.4	22.7	69.4
Region Total	\$277.7	\$470.1	\$334.8	\$332.4	\$685.0	\$2,100.0
% Change	3.5%	4.6%	0.0%	-0.7%	0.9%	1.6%

2017	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Bedford	\$44.6	\$60.4	\$44.9	\$48.5	\$99.1	\$297.4
Blair	35.6	75.0	58.5	57.0	131.8	358.0
Cambria	24.9	62.4	48.9	50.9	128.6	315.8
Centre	139.3	180.9	132.4	122.3	219.3	794.2
Fulton	2.3	5.4	4.2	4.7	8.1	24.7
Huntingdon	15.0	39.0	28.1	33.8	57.0	173.0
Juniata	1.4	8.5	6.3	7.7	12.8	36.7
Mifflin	5.2	17.9	11.7	9.7	21.9	66.4
Region Total	\$268.4	\$449.6	\$334.8	\$334.5	\$678.7	\$2,066.1

# The Alleghenies – Tourism Satellite Account

## THE ALLEGHENIES TOURISM SATELLITE ACCOUNT CATEGORIES, 2017 and 2018 (dollar amounts in millions)

2018	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Bedford	\$308.4	\$0.6	\$12.7	\$321.7
Blair	358.1	0.8	14.8	373.7
Cambria	316.4	0.8	13.0	330.2
Centre	809.1	2.4	33.4	844.8
Fulton	25.3	0.0	1.0	26.3
Huntingdon	176.6	0.3	7.3	184.2
Juniata	36.8	0.0	1.5	38.3
Mifflin	69.4	0.2	2.9	72.4
Region Total	\$2,100.0	\$5.1	\$86.6	\$2,191.7
% Change	1.6%	-0.3%	-1.5%	1.5%

2017	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Bedford	\$297.4	\$0.6	\$12.7	\$310.7
Blair	358.0	0.8	15.2	374.1
Cambria	315.8	0.8	13.4	330.0
Centre	794.2	2.4	33.8	830.3
Fulton	24.7	0.0	1.0	25.7
Huntingdon	173.0	0.3	7.4	180.7
Juniata	36.7	0.0	1.6	38.3
Mifflin	66.4	0.2	2.8	69.4
Region Total	\$2,066.1	\$5.1	\$87.9	\$2,159.1

\*Non-Travel Personal Consumption Expenditures represent travel-related consumer durable purchases, such as an RV, boat, or furniture for a vacation home.

# The Alleghenies –Travel Industry Impacts, 2017 & 2018

## THE ALLEGHENIES TRAVEL INDUSTRY IMPACTS, 2017 and 2018 (dollar amounts in millions)

2018	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Bedford	\$308.4	2,174	\$61.7	\$15.8	\$14.5
Blair	358.1	2,779	84.8	19.9	18.6
Cambria	316.4	2,076	73.2	17.4	16.2
Centre	809.1	5,120	162.8	42.4	38.2
Fulton	25.3	174	4.1	1.2	1.1
Huntingdon	176.6	1,444	38.9	9.5	8.8
Juniata	36.8	233	5.5	1.7	1.5
Mifflin	69.4	663	15.8	3.8	3.5
Region Total	\$2,100.0	14,665	\$446.8	\$111.7	\$102.3
% Change	1.6%	1.5%	2.5%	2.3%	4.3%

2017	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Bedford	\$297.4	2,080	\$59.3	\$15.3	\$13.7
Blair	358.0	2,796	84.3	19.7	18.2
Cambria	315.8	2,047	72.5	17.2	15.8
Centre	794.2	5,049	157.7	41.5	36.4
Fulton	24.7	167	4.0	1.1	1.0
Huntingdon	173.0	1,421	37.3	9.1	8.3
Juniata	36.7	232	5.4	1.7	1.4
Mifflin	66.4	651	15.5	3.6	3.3
Region Total	\$2,066.1	14,443	\$436.0	\$109.2	\$98.1

# The Alleghenies –Travel Economy Impacts, 2017 & 2018

## THE ALLEGHENIES TRAVEL ECONOMY IMPACTS, 2017 and 2018 (dollar amounts in millions)

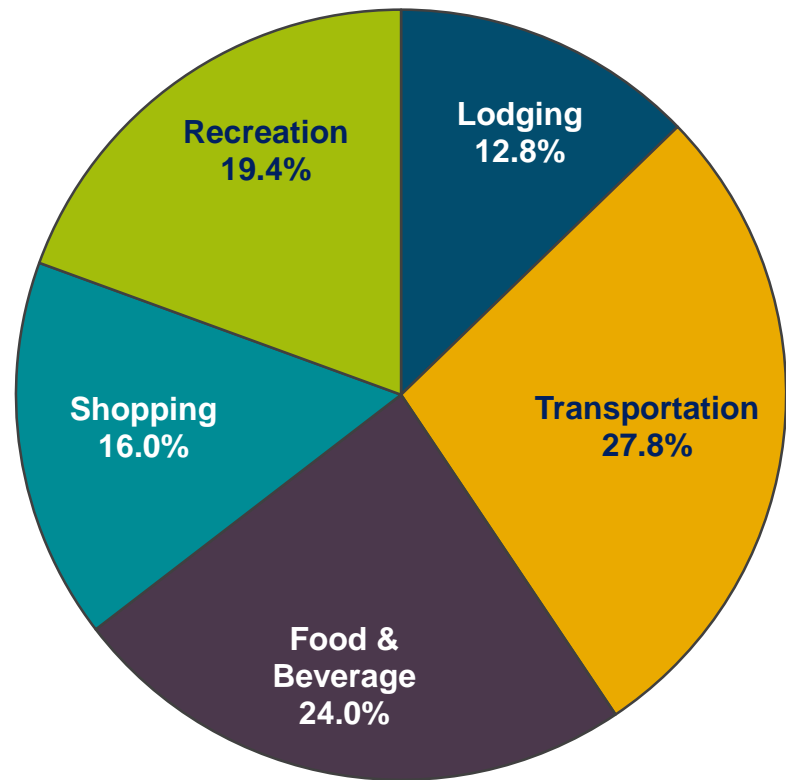
2018	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Bedford	\$321.7	3,120	\$112.4	\$27.7	\$29.2
Blair	373.7	4,348	155.9	34.7	37.4
Cambria	330.2	3,495	131.2	30.3	32.6
Centre	844.8	7,681	310.3	73.6	76.8
Fulton	26.3	304	7.7	2.1	2.1
Huntingdon	184.2	2,185	72.3	16.5	17.7
Juniata	38.3	477	10.2	3.0	3.0
Mifflin	72.4	1,136	30.2	6.7	7.1
Region Total	\$2,191.7	22,745	\$830.2	\$194.5	\$205.9
% Change	1.5%	0.3%	1.2%	1.7%	4.3%

2017	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Bedford	\$310.7	3,053	\$111.0	\$26.9	\$27.5
Blair	374.1	4,389	156.8	34.6	36.6
Cambria	330.0	3,511	134.3	30.2	31.8
Centre	830.3	7,650	300.1	72.3	73.2
Fulton	25.7	299	7.5	2.0	2.0
Huntingdon	180.7	2,169	71.0	16.0	16.7
Juniata	38.3	475	10.1	3.0	2.9
Mifflin	69.4	1,126	29.5	6.4	6.7
Region Total	\$2,159.1	22,674	\$820.3	\$191.3	\$197.5

# Valleys of the Susquehanna

- The Valleys of the Susquehanna region is comprised of the following counties: Columbia, Montour, Northumberland, Snyder, and Union.
- Travelers spent \$679 million in the region in 2018 – a 2.0% increase from 2017 and new record high.
- As in prior years, the Valleys of the Susquehanna region continued to have the highest proportion of traveler dollars spent on food & beverages among the state's 11 tourism regions. The region also continued to have the fourth highest share of total traveler spending on recreation in 2018.

## Valleys of the Susquehanna Region 2018 Spending by Category



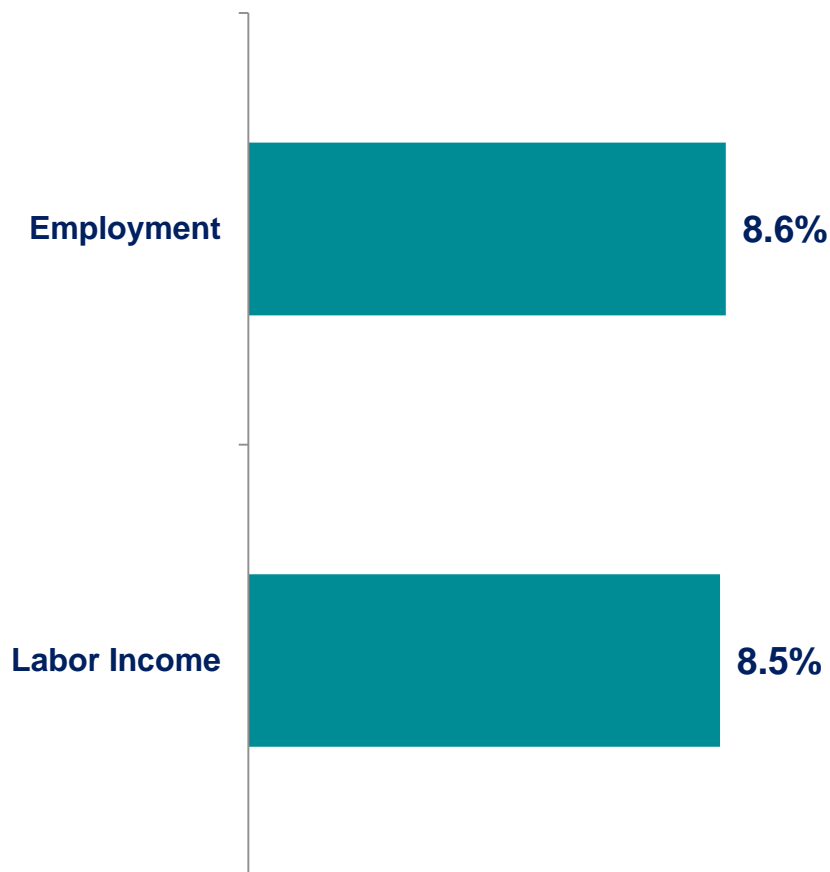
Source: Tourism Economics



# Valleys of the Susquehanna

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- The travel industry was responsible for 8.5% of the region's labor income – a 0.2 percentage point increase from 2017 – and 8.6% of the region's employment (unchanged) in 2018.
- The region continued to have the smallest number of travel-supported jobs and to rank 8<sup>th</sup> in travel-related employment as a share of the region's total employment among the state's 11 tourism regions in 2018.

**Travel Industry Share of Regional Economy**



# Valleys of the Susquehanna – Traveler Spending & Employment Timelines

## VALLEYS OF THE SUSQUEHANNA TRAVELER SPENDING, 2008 – 2018 (dollar amounts in millions)

County	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Columbia	\$140.3	\$114.5	\$127.6	\$150.5	\$150.6	\$153.7	\$153.8	\$151.9	\$154.2	\$167.7	\$178.3
Montour	93.5	79.2	88.0	97.3	105.3	102.3	97.2	96.1	94.4	97.9	100.5
Northumberland	114.4	99.1	113.3	118.3	118.3	124.3	125.0	129.8	133.0	138.1	137.9
Snyder	90.3	74.9	83.5	90.6	90.2	95.3	98.8	99.3	103.5	111.6	111.4
Union	136.7	115.7	124.3	147.8	157.5	149.2	142.7	142.6	142.0	150.0	151.0
Region Total	\$575.2	\$483.3	\$536.6	\$604.6	\$622.0	\$624.7	\$617.5	\$619.8	\$627.0	\$665.4	\$679.1
% Change	11.6%	-16.0%	11.0%	12.7%	2.9%	0.4%	-1.2%	0.4%	1.1%	6.1%	2.0%

## VALLEYS OF THE SUSQUEHANNA TRAVEL INDUSTRY EMPLOYMENT, 2008 – 2018

County	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Columbia	1,163	1,141	1,171	1,217	1,258	1,291	1,290	1,292	1,302	1,339	1,369
Montour	850	800	823	839	863	884	889	902	926	937	965
Northumberland	997	943	988	1,013	1,050	1,066	1,078	1,101	1,107	1,128	1,129
Snyder	702	665	691	702	722	740	744	764	776	790	803
Union	1,116	1,098	1,126	1,152	1,188	1,224	1,229	1,216	1,243	1,271	1,293
Region Total	4,828	4,647	4,799	4,924	5,081	5,205	5,229	5,275	5,353	5,465	5,558
% Change	1.1%	-3.7%	3.3%	2.6%	3.2%	2.4%	0.5%	0.9%	1.5%	2.1%	1.7%

# Valleys of the Susquehanna – Traveler Spending by Category

## VALLEYS OF THE SUSQUEHANNA TRAVELER SPENDING BY CATEGORY, 2017 and 2018 (dollar amounts in millions)

2018	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Columbia	\$26.2	\$45.2	\$27.9	\$30.4	\$48.6	\$178.3
Montour	16.2	22.7	15.6	19.0	27.0	100.5
Northumberland	4.4	26.1	16.8	40.1	50.6	137.9
Snyder	14.6	27.8	20.9	21.8	26.3	111.4
Union	25.2	41.0	27.5	20.6	36.7	151.0
<b>Region Total</b>	<b>\$86.6</b>	<b>\$162.8</b>	<b>\$108.6</b>	<b>\$132.0</b>	<b>\$189.1</b>	<b>\$679.1</b>
<b>% Change</b>	<b>4.7%</b>	<b>5.0%</b>	<b>0.6%</b>	<b>-1.1%</b>	<b>1.5%</b>	<b>2.0%</b>

2017	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Columbia	\$23.4	\$41.8	\$26.6	\$29.4	\$46.6	\$167.7
Montour	15.4	21.5	15.4	18.9	26.8	97.9
Northumberland	4.5	25.1	17.0	42.3	49.2	138.1
Snyder	14.7	27.0	21.3	22.3	26.4	111.6
Union	24.8	39.7	27.6	20.6	37.3	150.0
<b>Region Total</b>	<b>\$82.7</b>	<b>\$155.1</b>	<b>\$107.9</b>	<b>\$133.4</b>	<b>\$186.3</b>	<b>\$665.4</b>

# Valleys of the Susquehanna – Tourism Satellite Account

<b>VALLEYS OF THE SUSQUEHANNA                      TOURISM SATELLITE ACCOUNT CATEGORIES, 2017 and 2018</b> (dollar amounts in millions)				
<b>2018</b>	<b>Traveler Spending</b>	<b>Government Expenditures</b>	<b>Investment &amp; Non-Travel Personal Consumption Expenditures*</b>	<b>Total Travel Demand</b>
Columbia	\$178.3	\$0.4	\$7.4	\$186.1
Montour	100.5	0.3	4.1	104.9
Northumberland	137.9	0.1	5.7	143.7
Snyder	111.4	0.3	4.6	116.3
Union	151.0	0.5	6.2	157.7
Region Total	\$679.1	\$1.6	\$28.0	\$708.7
% Change	2.0%	-0.3%	-1.1%	1.9%
<b>2017</b>	<b>Traveler Spending</b>	<b>Government Expenditures</b>	<b>Investment &amp; Non-Travel Personal Consumption Expenditures*</b>	<b>Total Travel Demand</b>
Columbia	\$167.7	\$0.4	\$7.1	\$175.3
Montour	97.9	0.3	4.2	102.4
Northumberland	138.1	0.1	5.9	144.1
Snyder	111.6	0.3	4.7	116.7
Union	150.0	0.5	6.4	156.9
Region Total	\$665.4	\$1.6	\$28.3	\$695.4

\*Non-Travel Personal Consumption Expenditures represent travel-related consumer durable purchases, such as an RV, boat, or furniture for a vacation home.

# Valleys of the Susquehanna – Travel Industry Impacts, 2017 & 2018

## VALLEYS OF THE SUSQUEHANNA TRAVEL INDUSTRY IMPACTS, 2017 and 2018 (dollar amounts in millions)

2018	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Columbia	\$178.3	1,369	\$34.1	\$9.2	\$8.2
Montour	100.5	965	24.7	5.7	5.3
Northumberland	137.9	1,129	33.3	7.4	7.3
Snyder	111.4	803	18.6	5.4	4.7
Union	151.0	1,293	32.6	8.2	7.5
Region Total	\$679.1	5,558	\$143.4	\$36.0	\$33.0
% Change	2.0%	1.7%	1.7%	2.3%	4.2%

2017	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Columbia	\$167.7	1,339	\$33.4	\$8.7	\$7.7
Montour	97.9	937	23.9	5.5	5.1
Northumberland	138.1	1,128	33.4	7.5	7.1
Snyder	111.6	790	18.1	5.4	4.6
Union	150.0	1,271	32.2	8.1	7.2
Region Total	\$665.4	5,465	\$141.0	\$35.2	\$31.7

# Valleys of the Susquehanna – Travel Economy Impacts, 2017 & 2018

## VALLEYS OF THE SUSQUEHANNA TRAVEL ECONOMY IMPACTS, 2017 and 2018 (dollar amounts in millions)

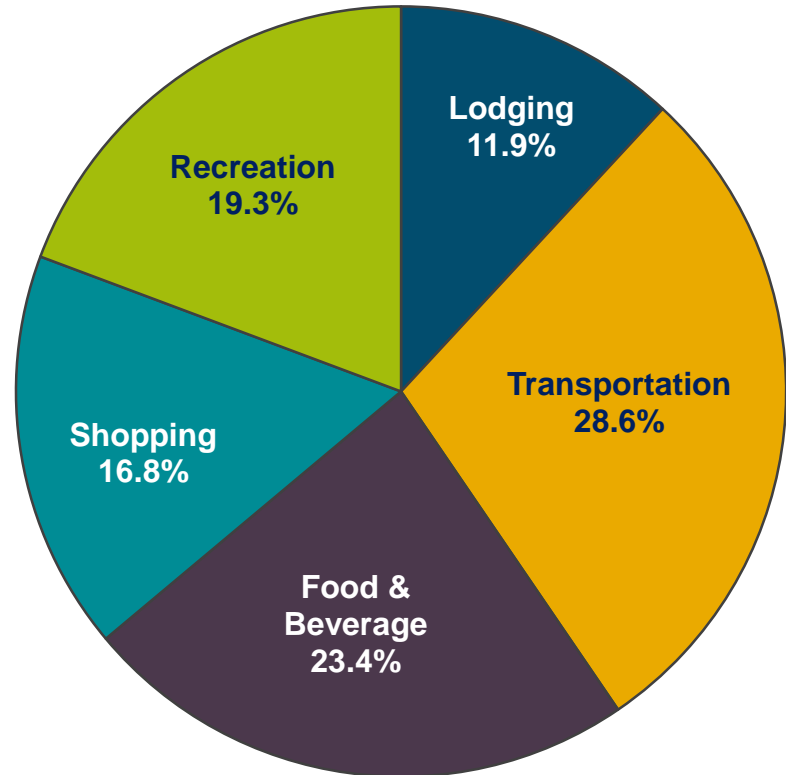
2018	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Columbia	\$186.1	2,147	\$63.5	\$16.0	\$16.5
Montour	104.9	1,376	47.5	9.9	10.8
Northumberland	143.7	1,973	60.5	13.2	14.6
Snyder	116.3	1,298	37.8	9.5	9.5
Union	157.7	1,977	64.2	14.3	15.0
Region Total	\$708.7	8,772	\$273.6	\$62.8	\$66.4
% Change	1.9%	0.5%	2.2%	1.8%	4.1%

2017	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Columbia	\$175.3	2,135	\$62.4	\$15.2	\$15.5
Montour	102.4	1,355	45.6	9.7	10.2
Northumberland	144.1	1,989	62.2	13.3	14.4
Snyder	116.7	1,287	35.4	9.4	9.2
Union	156.9	1,959	62.0	14.1	14.5
Region Total	\$695.4	8,724	\$267.6	\$61.7	\$63.8

# Upstate PA

- The Upstate PA region is comprised of the following counties: Bradford, Lackawanna, Luzerne, Schuylkill, Sullivan, Susquehanna, and Wyoming.
- Travelers spent close to \$2.35 billion in the Upstate PA region in 2018 – a 3.1% increase and a new record high.
- As in prior years, the Upstate PA region continued to have the second highest share of spending by travelers on food & beverage purchases among the state's 11 tourism regions in 2018, but ranked 8<sup>th</sup> in the share of travel dollars spent on lodging.

## Upstate PA Region 2018 Spending by Category



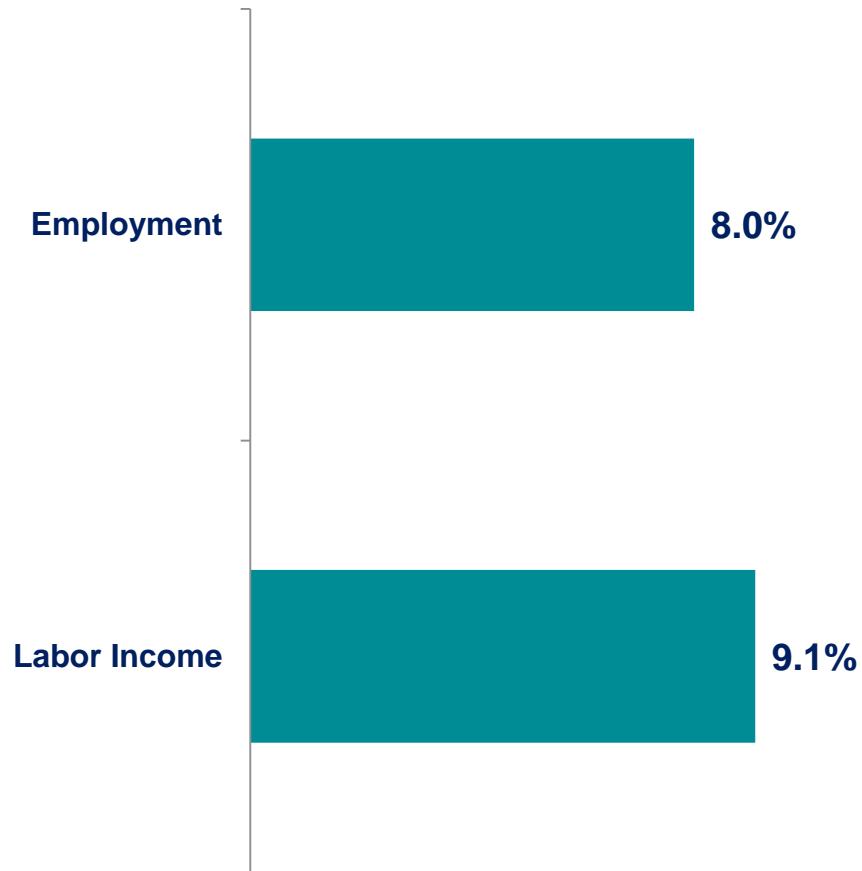
Source: Tourism Economics

# Upstate PA

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- The chart shows the travel economy's share (including indirect and induced impacts) of the regional total for both labor income and employment.
- The travel and tourism industry's share of the region's employment remained at 8.0% in 2018 and continued to be the second lowest of the state's 11 tourism regions, despite ranking 5th in the actual number of jobs supported by travel and tourism in 2018.
- The travel-related labor income share for the Upstate PA region remained at 9.1% in 2018 and, as in prior years, was well above the region's 8.0% employment share.

**Travel Industry Share of Regional Economy**





# Upstate PA – Traveler Spending & Employment Timelines

## UPSTATE PA TRAVELER SPENDING, 2008 – 2018 (dollar amounts in millions)

County	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Bradford	\$148.3	\$136.3	\$170.0	\$200.5	\$225.3	\$223.1	\$227.6	\$211.8	\$195.9	\$206.1	\$217.8
Lackawanna	566.5	483.1	536.5	615.5	632.1	648.4	633.3	618.4	605.7	649.9	667.2
Luzerne	818.6	708.3	795.5	870.3	870.2	859.9	875.1	889.7	913.9	965.3	989.0
Schuylkill	195.2	158.5	159.2	176.8	195.7	196.3	198.9	206.2	206.2	216.5	223.5
Sullivan	14.4	13.1	16.0	18.7	19.7	19.1	18.6	17.6	17.7	20.3	21.9
Susquehanna	140.4	122.7	141.6	151.8	164.3	163.1	161.7	157.1	153.4	157.4	163.0
Wyoming	40.3	36.8	41.3	53.1	61.2	64.1	63.5	61.2	51.6	60.0	63.8
Region Total	\$1,923.7	\$1,658.6	\$1,860.2	\$2,086.6	\$2,168.5	\$2,174.1	\$2,178.6	\$2,161.8	\$2,144.3	\$2,275.5	\$2,346.2
% Change	9.9%	-13.8%	12.2%	12.2%	3.9%	0.3%	0.2%	-0.8%	-0.8%	6.1%	3.1%

## UPSTATE PA TRAVEL INDUSTRY EMPLOYMENT, 2008 – 2018

County	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Bradford	1,031	1,037	1,252	1,326	1,333	1,402	1,410	1,408	1,378	1,395	1,434
Lackawanna	4,855	4,563	4,752	4,882	5,006	5,131	5,183	5,117	5,056	5,182	5,294
Luzerne	6,253	5,978	6,275	6,534	6,619	6,754	7,056	7,068	7,151	7,227	7,284
Schuylkill	1,287	1,187	1,165	1,177	1,203	1,219	1,225	1,221	1,253	1,267	1,287
Sullivan	118	117	138	148	160	173	174	167	172	175	183
Susquehanna	1,044	1,002	1,024	1,061	1,060	1,105	1,110	1,096	1,116	1,129	1,172
Wyoming	364	365	362	379	400	421	423	417	404	412	424
Region Total	14,952	14,250	14,967	15,507	15,781	16,205	16,580	16,494	16,528	16,787	17,078
% Change	1.7%	-4.7%	5.0%	3.6%	1.8%	2.7%	2.3%	-0.5%	0.2%	1.6%	1.7%

# Upstate PA – Traveler Spending by Category, 2017 & 2018

## UPSTATE PA TRAVELER SPENDING BY CATEGORY, 2017 and 2018 (dollar amounts in millions)

2018	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Bradford	\$24.6	\$49.6	\$33.3	\$37.0	\$73.3	\$217.8
Lackawanna	88.4	165.5	130.5	119.7	163.1	667.2
Luzerne	122.1	223.8	154.7	213.2	275.3	989.0
Schuylkill	20.4	56.2	36.1	35.9	74.9	223.5
Sullivan	3.0	4.0	3.0	6.1	5.8	21.9
Susquehanna	11.0	36.7	24.2	30.4	60.7	163.0
Wyoming	9.4	14.1	12.2	10.6	17.6	63.8
<b>Region Total</b>	<b>\$278.9</b>	<b>\$549.8</b>	<b>\$394.0</b>	<b>\$452.9</b>	<b>\$670.7</b>	<b>\$2,346.2</b>
<b>% Change</b>	<b>5.8%</b>	<b>5.5%</b>	<b>1.0%</b>	<b>1.1%</b>	<b>2.7%</b>	<b>3.1%</b>

2017	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Bradford	\$20.7	\$45.8	\$32.5	\$35.3	\$71.7	\$206.1
Lackawanna	83.4	156.9	128.1	119.6	161.8	649.9
Luzerne	118.7	214.2	155.4	212.1	264.8	965.3
Schuylkill	18.8	53.0	36.2	35.2	73.4	216.5
Sullivan	2.5	3.6	2.8	5.9	5.5	20.3
Susquehanna	10.7	34.6	23.5	30.0	58.6	157.4
Wyoming	8.5	13.1	11.4	9.8	17.1	60.0
<b>Region Total</b>	<b>\$263.5</b>	<b>\$521.1</b>	<b>\$390.0</b>	<b>\$448.0</b>	<b>\$653.0</b>	<b>\$2,275.5</b>

# Upstate PA – Tourism Satellite Account

UPSTATE PA TOURISM SATELLITE ACCOUNT CATEGORIES, 2017 and 2018 (dollar amounts in millions)				
2018	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Bradford	\$217.8	\$0.4	\$9.0	\$227.2
Lackawanna	667.2	3.2	27.5	697.9
Luzerne	989.0	3.3	40.8	1,033.2
Schuylkill	223.5	0.4	9.2	233.2
Sullivan	21.9	0.0	0.9	22.9
Susquehanna	163.0	0.2	6.7	169.9
Wyoming	63.8	0.2	2.6	66.6
Region Total	\$2,346.2	\$7.8	\$96.7	\$2,450.8
% Change	3.1%	0.0%	-0.1%	3.0%

2017	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Bradford	\$206.1	\$0.4	\$8.8	\$215.3
Lackawanna	649.9	3.2	27.7	680.7
Luzerne	965.3	3.3	41.1	1,009.7
Schuylkill	216.5	0.4	9.2	226.2
Sullivan	20.3	0.0	0.9	21.2
Susquehanna	157.4	0.2	6.7	164.3
Wyoming	60.0	0.2	2.6	62.8
Region Total	\$2,275.5	\$7.8	\$96.8	\$2,380.1

\*Non-Travel Personal Consumption Expenditures represent travel-related consumer durable purchases, such as an RV, boat, or furniture for a vacation home.

# Upstate PA –Travel Industry Impacts, 2017 & 2018

## UPSTATE PA TRAVEL INDUSTRY IMPACTS, 2017 and 2018 (dollar amounts in millions)

2018	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Bradford	\$217.8	1,434	\$37.9	\$10.7	\$9.5
Lackawanna	667.2	5,294	140.0	36.7	32.1
Luzerne	989.0	7,284	245.6	56.3	52.7
Schuylkill	223.5	1,287	46.7	11.8	10.8
Sullivan	21.9	183	4.0	1.1	1.0
Susquehanna	163.0	1,172	28.7	7.9	7.1
Wyoming	63.8	424	11.5	3.4	2.9
Region Total	\$2,346.2	17,078	\$514.3	\$127.8	\$115.9
% Change	3.1%	1.7%	1.2%	2.2%	3.8%

2017	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Bradford	\$206.1	1,395	\$37.3	\$10.2	\$9.0
Lackawanna	649.9	5,182	136.6	35.9	30.8
Luzerne	965.3	7,227	247.3	56.0	51.6
Schuylkill	216.5	1,267	45.3	11.3	10.2
Sullivan	20.3	175	3.9	1.0	0.9
Susquehanna	157.4	1,129	26.9	7.6	6.6
Wyoming	60.0	412	11.1	3.1	2.6
Region Total	\$2,275.5	16,787	\$508.4	\$125.0	\$111.7

# Upstate PA –Travel Economy Impacts, 2017 & 2018

## UPSTATE PA TRAVEL ECONOMY IMPACTS, 2017 and 2018 (dollar amounts in millions)

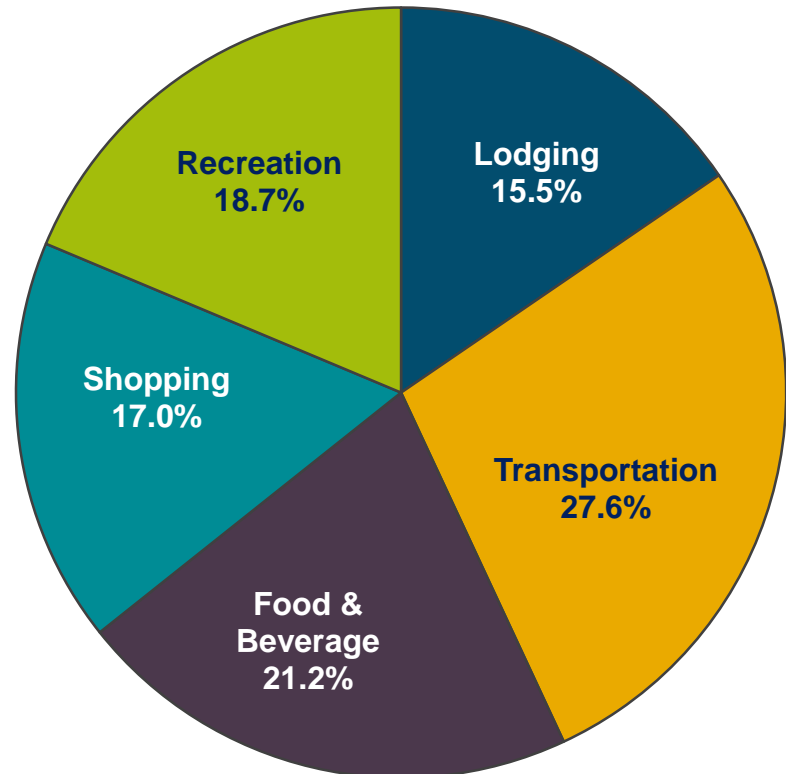
2018	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Bradford	\$227.2	2,167	\$67.2	\$18.6	\$19.0
Lackawanna	697.9	8,094	265.9	62.6	64.5
Luzerne	1,033.2	11,459	466.5	97.7	106.2
Schuylkill	233.2	2,510	85.4	20.6	21.7
Sullivan	22.9	265	6.6	1.9	2.0
Susquehanna	169.9	1,795	50.9	13.9	14.3
Wyoming	66.6	679	21.1	5.8	5.7
Region Total	\$2,450.8	26,969	\$963.5	\$221.1	\$233.5
% Change	3.0%	0.2%	0.2%	1.6%	3.7%

2017	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Bradford	\$215.3	2,170	\$68.3	\$17.9	\$18.0
Lackawanna	680.7	8,065	258.3	61.6	62.0
Luzerne	1,009.7	11,469	472.6	97.7	104.1
Schuylkill	226.2	2,500	85.2	19.9	20.6
Sullivan	21.2	259	6.8	1.8	1.8
Susquehanna	164.3	1,766	49.1	13.3	13.3
Wyoming	62.8	680	20.9	5.3	5.3
Region Total	\$2,380.1	26,908	\$961.1	\$217.6	\$225.1

# Pocono Mountains

- The Pocono Mountains region is comprised of the following counties: Carbon, Monroe, Pike, and Wayne.
- Travelers spent close to \$4 billion in the Pocono Mountains region in 2018 – the fourth highest amount among the state’s tourism regions and new record high. The 2.5% increase marked a slowdown from the exceptionally strong increases of the prior three years.
- Lodging continued to be an especially important use of travelers’ trip budgets with the region continuing to rank second among the 11 tourism regions in the percentage of total spending going to lodging, but ranked 9<sup>th</sup> in the portion of the trip budgets spent on food & beverage purchases in 2018.

**Pocono Mountains Region  
2018 Spending by Category**

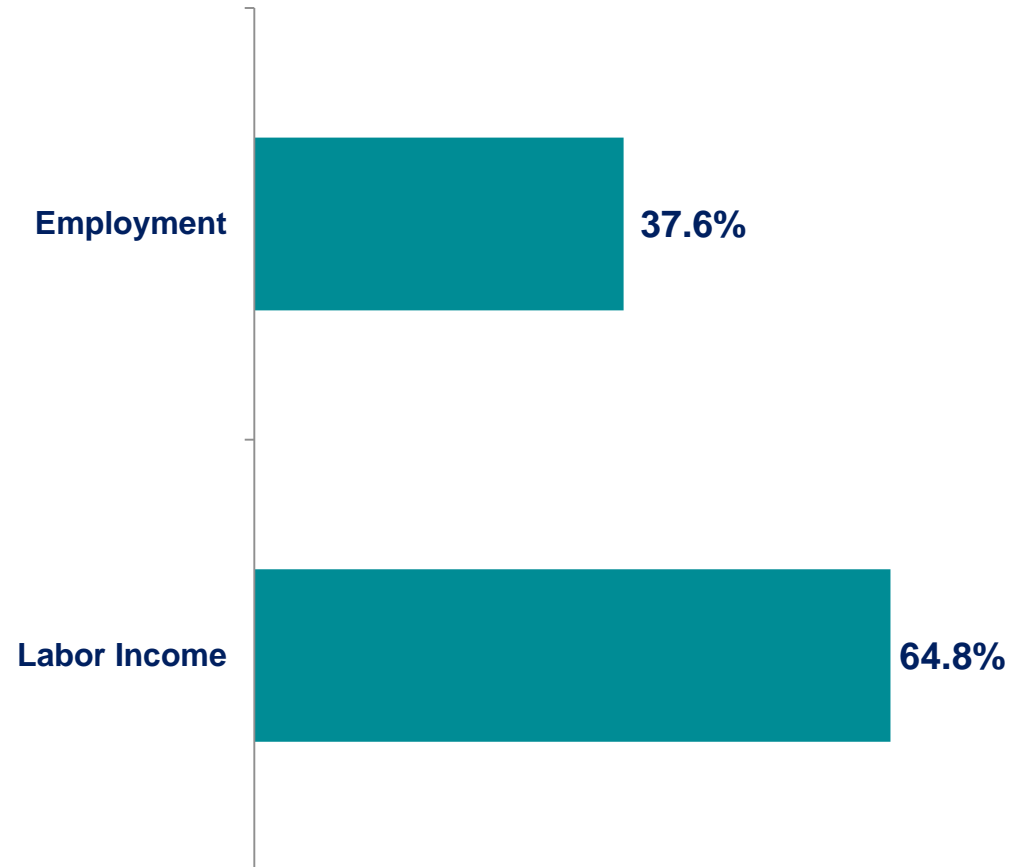


Source: Tourism Economics

# Pocono Mountains

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- Close to two-thirds of the region's labor income was derived from travel and tourism in 2018, while the employment share of the region's total fell slightly (by 0.3 of a percentage point) to 37.6%.
- As in prior years, the Pocono Mountains region continued to have the highest proportion of labor income and employment supported by travel and at rates well above those of the state's other tourism regions.

**Travel Industry Share of Regional Economy**



# Pocono Mountains – Traveler Spending & Employment Timelines

## POCONO MOUNTAINS TRAVELER SPENDING, 2008 – 2018 (dollar amounts in millions)

County	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Carbon	\$320.2	\$294.5	\$314.7	\$332.4	\$343.7	\$345.4	\$344.8	\$366.3	\$393.8	\$426.5	\$425.3
Monroe	1,665.3	1,372.6	1,502.1	1,552.0	1,607.5	1,596.5	1,606.3	1,788.2	2,034.2	2,300.5	2,351.7
Pike	616.5	520.7	538.0	553.5	575.1	606.0	607.0	636.6	663.5	691.9	720.9
Wayne	437.6	400.4	422.4	432.7	429.5	424.2	419.7	433.1	443.7	462.3	478.9
Region Total	\$3,039.6	\$2,588.2	\$2,777.2	\$2,870.7	\$2,955.9	\$2,972.1	\$2,977.7	\$3,224.2	\$3,535.2	\$3,881.2	\$3,976.9
% Change	10.7%	-14.9%	7.3%	3.4%	3.0%	0.5%	0.2%	8.3%	9.6%	9.8%	2.5%

## POCONO MOUNTAINS TRAVEL INDUSTRY EMPLOYMENT, 2008 – 2018

County	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Carbon	2,792	2,766	2,717	2,733	2,638	2,693	2,722	2,759	2,897	2,947	2,938
Monroe	13,777	12,780	12,937	13,011	12,847	12,912	12,890	13,411	14,051	14,488	14,464
Pike	5,715	5,257	4,856	4,852	4,760	4,853	4,922	5,084	5,229	5,322	5,457
Wayne	3,212	3,151	3,107	3,120	3,143	3,120	3,049	3,103	3,198	3,253	3,371
Region Total	25,496	23,954	23,617	23,717	23,388	23,579	23,582	24,358	25,375	26,011	26,231
% Change	0.2%	-6.0%	-1.4%	0.4%	-1.4%	0.8%	0.0%	3.3%	4.2%	2.5%	0.8%



# Pocono Mountains – Traveler Spending by Category

## POCONO MOUNTAINS TRAVELER SPENDING BY CATEGORY, 2017 and 2018 (dollar amounts in millions)

2018	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Carbon	\$53.8	\$89.2	\$61.4	\$89.1	\$131.8	\$425.3
Monroe	415.7	490.8	429.8	449.7	565.8	2,351.7
Pike	94.4	158.3	110.9	118.1	239.2	720.9
Wayne	50.7	106.6	74.5	86.2	161.0	478.9
Region Total	\$614.6	844.9	\$676.6	\$743.0	\$1,097.8	3,976.9
% Change	4.6%	4.9%	1.1%	0.2%	1.9%	2.5%

2017	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Carbon	\$54.2	\$87.0	\$60.3	\$89.2	\$135.9	\$426.5
Monroe	397.8	468.8	427.1	451.6	555.2	2,300.5
Pike	87.8	148.9	108.5	115.6	231.1	691.9
Wayne	48.0	100.8	73.0	84.9	155.5	462.3
Region Total	\$587.8	805.5	\$669.0	\$741.3	\$1,077.6	\$3,881.2

# Pocono Mountains – Tourism Satellite Account

## POCONO MOUNTAINS TOURISM SATELLITE ACCOUNT CATEGORIES, 2017 and 2018 (dollar amounts in millions)

2018	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Carbon	\$425.3	\$0.9	\$17.5	\$443.8
Monroe	2,351.7	7.1	97.0	2,455.8
Pike	720.9	1.6	29.7	752.2
Wayne	478.9	0.7	19.7	499.4
Region Total	3,976.9	\$10.3	\$164.0	\$4,151.2
% Change	2.5%	-0.1%	-0.7%	2.3%

2017	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Carbon	426.5	\$0.9	\$18.2	\$445.6
Monroe	2,300.5	7.1	97.9	2,405.5
Pike	691.9	1.6	29.4	723.0
Wayne	462.3	0.7	19.7	482.6
Region Total	3,881.2	\$10.3	\$165.2	\$4,056.7

\*Non-Travel Personal Consumption Expenditures represent travel-related consumer durable purchases, such as an RV, boat, or furniture for a vacation home.

# Pocono Mountains – Travel Industry Impacts, 2017 & 2018

## POCONO MOUNTAINS TRAVEL INDUSTRY IMPACTS, 2017 and 2018 (dollar amounts in millions)

2018	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Carbon	\$425.3	2,938	\$74.4	\$20.8	\$18.6
Monroe	2,351.7	14,464	512.6	127.5	115.9
Pike	720.9	5,457	196.7	41.9	40.9
Wayne	478.9	3,371	109.9	25.5	24.4
Region Total	\$3,976.9	26,231	\$893.5	\$215.8	\$199.8
% Change	2.5%	0.8%	2.3%	2.3%	4.3%

2017	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Carbon	\$426.5	2,947	\$73.3	\$20.9	\$18.0
Monroe	2,300.5	14,488	505.5	124.8	111.9
Pike	691.9	5,322	188.8	40.4	38.5
Wayne	462.3	3,253	106.0	24.8	23.1
Region Total	\$3,881.2	26,011	\$873.7	\$210.9	\$191.5

# Pocono Mountains – Travel Economy Impacts, 2017 & 2018

## POCONO MOUNTAINS TRAVEL ECONOMY IMPACTS, 2017 and 2018 (dollar amounts in millions)

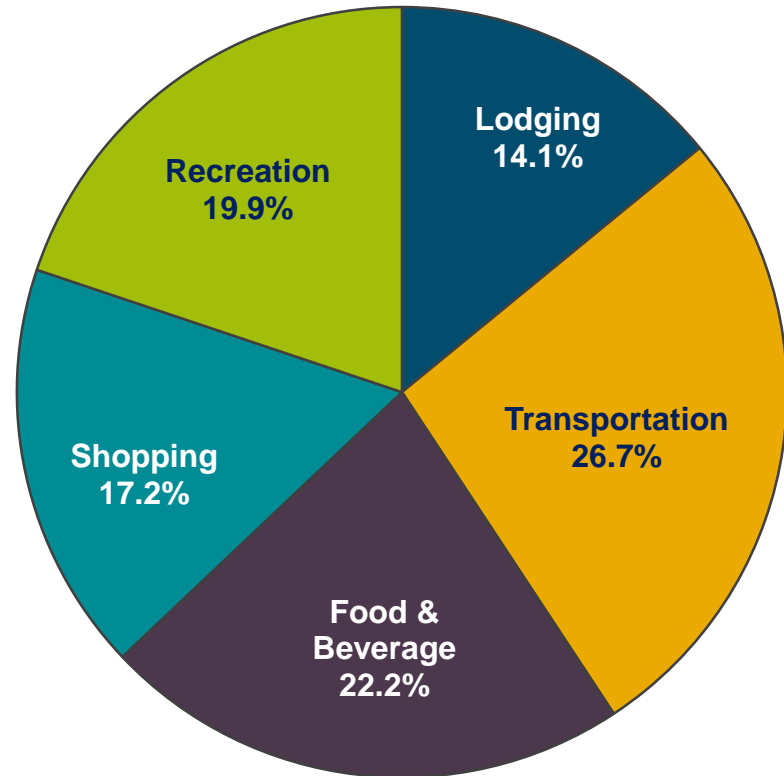
2018	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Carbon	\$443.8	4,362	\$139.2	\$36.3	\$37.4
Monroe	2,455.8	20,614	934.8	219.9	233.5
Pike	752.2	7,589	364.5	73.2	82.5
Wayne	499.4	4,886	199.1	44.8	49.2
Region Total	\$4,151.2	37,452	\$1,637.6	\$374.2	\$402.6
% Change	2.3%	0.5%	-0.1%	1.3%	4.4%

2017	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Carbon	\$445.6	4,360	\$138.6	\$36.5	\$36.3
Monroe	2,405.5	20,630	941.4	217.8	225.3
Pike	723.0	7,486	358.8	71.2	77.7
Wayne	482.6	4,784	200.6	43.8	46.5
Region Total	\$4,056.7	37,259	\$1,639.4	\$369.3	\$385.8

# Dutch Country Roads

- The Dutch Country Roads region is comprised of the following counties: Adams, Berks, Cumberland, Dauphin, Franklin, Lancaster, Lebanon, Perry, and York.
- Travelers spent almost \$8.9 billion in the Dutch Country Roads region in 2018 – the second highest amount of the state’s tourism regions, a 1.9% increase from 2017 and new record high.
- Lodging, shopping, and recreation continued to be equally important to the region’s travelers with the region ranking third among the state’s tourism regions in the share of travel budgets going to each of these three spending categories in 2018. In contrast, the region continued to rank 10<sup>th</sup> in the amount of trip budgets allocated to transportation.

**Dutch Country Roads Region  
2018 Spending by Category**

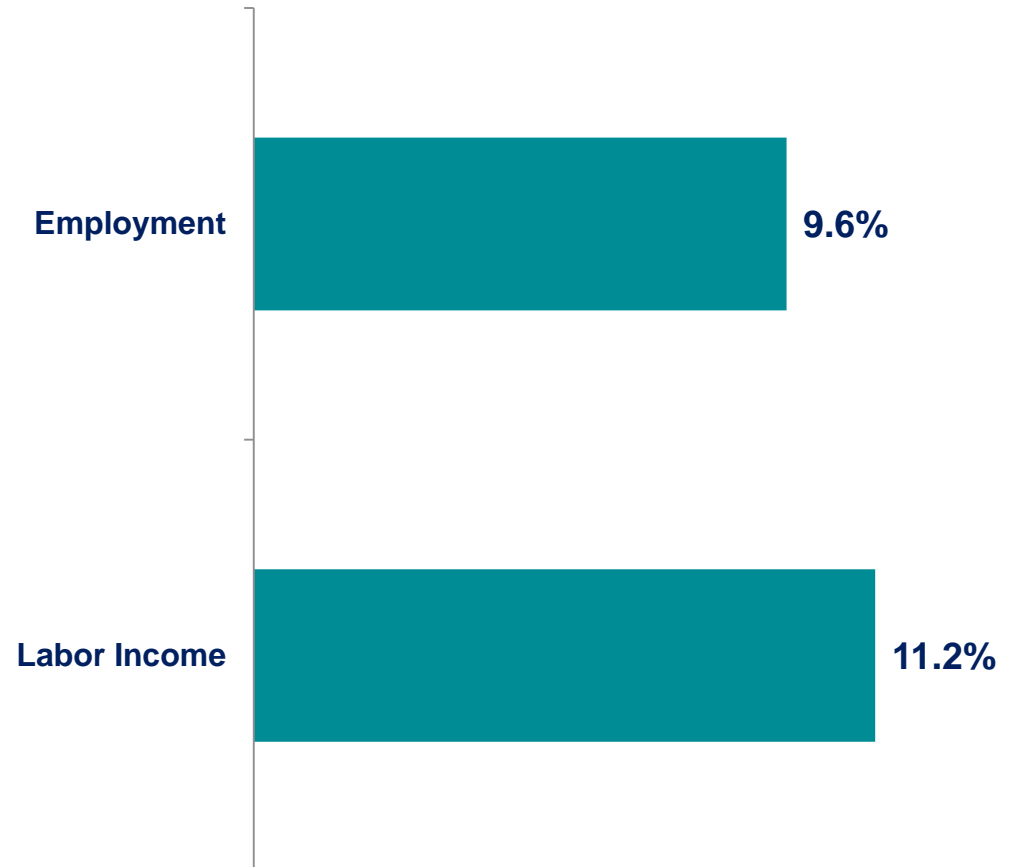


Source: Tourism Economics

# Dutch Country Roads

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- The region continued to have the second highest number of jobs supported by the travel industry among the state's 11 tourism regions in 2018, but dropped to 6<sup>th</sup> in terms of the industry's share of regional employment.
- The proportion of labor income attributed to the region's travel and tourism industry rose 0.2 of a percentage point to 11.2% in 2018, while the employment fell by an equal amount to 9.6%.

**Travel Industry Share of Regional Economy**



# Dutch Country Roads – Traveler Spending & Employment Timelines

## DUTCH COUNTRY ROADS TRAVELER SPENDING, 2008 – 2018 (dollar amounts in millions)

County	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Adams	\$602.8	\$520.9	\$555.8	\$608.0	\$628.8	\$671.8	\$666.0	\$686.7	\$691.0	\$725.9	\$735.0
Berks	746.9	623.7	687.7	762.7	794.8	807.3	795.8	824.4	855.7	901.9	930.7
Cumberland	774.2	628.3	677.8	726.7	749.8	760.3	774.0	816.6	838.5	881.8	892.8
Dauphin	2,142.4	1,878.7	2,013.3	2,135.1	2,213.7	2,286.3	2,314.8	2,335.9	2,356.7	2,459.6	2,476.3
Franklin	322.2	270.2	286.5	298.0	314.8	323.4	324.3	326.7	317.6	327.5	332.6
Lancaster	1,706.5	1,523.1	1,669.7	1,792.7	1,817.5	1,854.9	1,919.9	1,975.4	2,065.4	2,138.4	2,200.1
Lebanon	182.2	159.9	170.9	185.6	192.6	193.9	200.9	201.4	205.4	217.8	249.0
Perry	48.6	40.6	43.6	48.7	46.8	46.9	47.4	47.9	48.3	49.6	50.6
York	829.2	706.5	753.5	850.2	885.1	907.5	923.0	943.7	973.4	1,016.3	1,019.6
Region Total	\$7,355.2	\$6,351.8	\$6,858.9	\$7,407.6	\$7,643.8	\$7,852.4	\$7,966.1	\$8,158.8	\$8,352.0	\$8,718.8	\$8,886.8
% Change	13.3%	-13.6%	8.0%	8.0%	3.2%	2.7%	1.4%	2.4%	2.4%	4.4%	1.9%

## DUTCH COUNTRY ROADS TRAVEL INDUSTRY EMPLOYMENT, 2008 – 2018

County	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Adams	5,063	4,835	4,771	4,788	4,866	5,080	5,074	5,105	5,199	5,272	5,343
Berks	6,490	6,067	6,173	6,238	6,468	6,577	6,564	6,622	6,828	6,901	7,051
Cumberland	6,408	5,909	5,812	5,935	6,068	6,152	6,215	6,239	6,304	6,442	6,554
Dauphin	18,282	17,583	17,735	17,887	18,533	18,724	18,709	18,846	19,036	19,368	19,382
Franklin	2,473	2,298	2,276	2,288	2,352	2,438	2,438	2,444	2,513	2,533	2,583
Lancaster	14,766	14,381	14,640	14,753	15,239	15,478	15,731	15,853	16,310	16,554	16,747
Lebanon	1,627	1,544	1,534	1,562	1,609	1,654	1,667	1,655	1,695	1,714	1,759
Perry	309	296	302	310	321	327	328	340	347	346	345
York	7,656	7,213	7,038	7,165	7,421	7,525	7,637	7,709	7,913	8,010	8,046
Region Total	63,074	60,127	60,281	60,927	62,877	63,955	64,363	64,814	66,147	67,141	67,810
% Change	0.6%	-4.7%	0.3%	1.1%	3.2%	1.7%	0.6%	0.7%	2.1%	1.5%	1.0%

# Dutch Country Roads – Traveler Spending by Category

## DUTCH COUNTRY ROADS TRAVELER SPENDING BY CATEGORY, 2017 and 2018 (dollar amounts in millions)

2018	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Adams	\$99.8	\$153.7	\$133.6	\$176.3	\$171.6	\$735.0
Berks	103.7	217.3	169.9	163.5	276.3	930.7
Cumberland	130.4	216.2	148.3	148.8	249.1	892.8
Dauphin	411.3	495.1	367.9	587.5	614.5	2,476.3
Franklin	37.7	82.0	54.9	63.5	94.6	332.6
Lancaster	324.6	490.8	421.9	399.5	563.3	2,200.1
Lebanon	21.6	58.0	45.1	39.5	84.8	249.0
Perry	2.0	13.1	9.4	8.3	17.8	50.6
York	119.3	247.2	178.2	177.8	297.1	1,019.6
<b>Region Total</b>	<b>\$1,250.4</b>	<b>\$1,973.5</b>	<b>\$1,529.2</b>	<b>\$1,764.6</b>	<b>\$2,369.2</b>	<b>\$8,886.8</b>
<b>% Change</b>	<b>3.2%</b>	<b>4.5%</b>	<b>1.5%</b>	<b>-0.8%</b>	<b>1.6%</b>	<b>1.9%</b>

2017	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Adams	\$97.6	\$148.4	\$130.1	\$174.6	\$175.2	\$725.9
Berks	99.6	207.3	162.9	161.6	270.5	901.9
Cumberland	130.7	210.3	147.6	152.1	241.1	881.8
Dauphin	400.4	478.2	370.1	597.7	613.3	2,459.6
Franklin	36.5	78.5	55.0	62.9	94.7	327.5
Lancaster	306.2	459.1	409.6	402.7	560.8	2,138.4
Lebanon	19.8	54.3	43.8	38.3	61.7	217.8
Perry	2.0	12.6	9.3	8.2	17.5	49.6
York	119.2	239.3	178.7	180.9	298.2	1,016.3
<b>Region Total</b>	<b>\$1,212.0</b>	<b>\$1,887.9</b>	<b>\$1,507.0</b>	<b>\$1,779.0</b>	<b>\$2,332.9</b>	<b>\$8,718.8</b>



# Dutch Country Roads – Tourism Satellite Account

## DUTCH COUNTRY ROADS TOURISM SATELLITE ACCOUNT CATEGORIES, 2017 and 2018 (dollar amounts in millions)

2018	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Adams	\$735.0	\$2.8	\$30.3	\$768.2
Berks	930.7	2.9	38.4	972.0
Cumberland	892.8	2.6	36.8	932.1
Dauphin	2,476.3	12.7	102.1	2,591.1
Franklin	332.6	0.8	13.7	347.2
Lancaster	2,200.1	9.3	90.7	2,300.1
Lebanon	249.0	0.5	10.3	259.8
Perry	50.6	0.0	2.1	52.7
York	1,019.6	3.2	42.0	1,064.8
<b>Region Total</b>	<b>\$8,886.8</b>	<b>\$34.9</b>	<b>\$366.5</b>	<b>\$9,288.1</b>
% Change	1.9%	-0.2%	-1.2%	1.8%

2017	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Adams	725.9	\$2.8	\$30.9	\$759.6
Berks	901.9	2.9	38.4	943.2
Cumberland	881.8	2.6	37.5	921.9
Dauphin	2,459.6	12.7	104.7	2,577.0
Franklin	327.5	0.8	13.9	342.3
Lancaster	2,138.4	9.3	91.0	2,238.7
Lebanon	217.8	0.5	9.3	227.6
Perry	49.6	0.0	2.1	51.7
York	1,016.3	3.2	43.2	1,062.7
<b>Region Total</b>	<b>\$8,718.8</b>	<b>\$34.9</b>	<b>\$371.0</b>	<b>\$9,124.8</b>

\*Non-Travel Personal Consumption Expenditures represent travel-related consumer durable purchases, such as an RV, boat, or furniture for a vacation home.

# Dutch Country Roads – Travel Industry Impacts, 2017 & 2018

## DUTCH COUNTRY ROADS TRAVEL INDUSTRY IMPACTS, 2017 and 2018 (dollar amounts in millions)

2018	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Adams	\$735.0	5,343	\$163.8	\$40.6	\$36.8
Berks	930.7	7,051	215.9	51.7	47.8
Cumberland	892.8	6,554	191.2	47.6	43.6
Dauphin	2,476.3	19,382	700.2	154.1	144.0
Franklin	332.6	2,583	76.3	18.4	16.9
Lancaster	2,200.1	16,747	473.2	121.0	107.9
Lebanon	249.0	1,759	60.3	13.9	13.1
Perry	50.6	345	8.5	2.4	2.2
York	1,019.6	8,046	247.7	58.0	53.7
<b>Region Total</b>	<b>\$8,886.8</b>	<b>67,810</b>	<b>\$2,137.1</b>	<b>\$507.7</b>	<b>\$466.0</b>
% Change	1.9%	1.0%	2.6%	2.2%	4.4%

2017	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Adams	\$725.9	5,272	\$158.5	\$39.9	\$35.2
Berks	901.9	6,901	212.1	50.4	45.7
Cumberland	881.8	6,442	183.2	46.7	41.5
Dauphin	2,459.6	19,368	689.4	152.4	139.4
Franklin	327.5	2,533	73.7	17.8	16.1
Lancaster	2,138.4	16,554	459.2	117.7	102.5
Lebanon	217.8	1,714	58.1	12.6	12.0
Perry	49.6	346	8.5	2.3	2.1
York	1,016.3	8,010	240.8	56.8	51.7
<b>Region Total</b>	<b>\$8,718.8</b>	<b>67,141</b>	<b>\$2,083.3</b>	<b>\$496.7</b>	<b>\$446.2</b>

# Dutch Country Roads – Travel Economy Impacts, 2017 & 2018

## DUTCH COUNTRY ROADS TRAVEL ECONOMY IMPACTS, 2017 and 2018 (dollar amounts in millions)

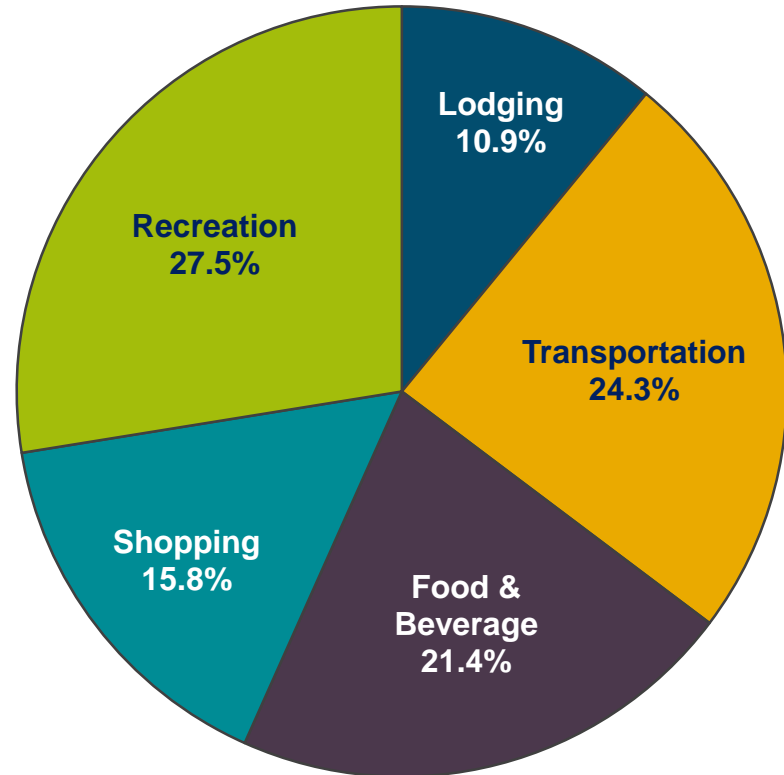
2018	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Adams	\$768.2	7,907	\$304.0	\$70.1	\$74.1
Berks	972.0	11,518	404.7	89.8	96.2
Cumberland	932.1	9,827	363.6	82.9	87.9
Dauphin	2,591.1	26,816	1,294.3	265.1	290.5
Franklin	347.2	4,246	141.9	31.9	34.0
Lancaster	2,300.1	24,998	882.7	208.3	217.2
Lebanon	259.8	3,035	111.3	24.3	26.4
Perry	52.7	739	16.2	4.2	4.4
York	1,064.8	13,036	467.6	100.5	108.3
Region Total	\$9,288.1	102,122	\$3,986.3	\$877.1	\$939.0
% Change	1.8%	0.1%	1.8%	1.8%	4.4%

2017	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Adams	\$759.6	7,883	\$298.3	\$69.1	\$70.8
Berks	943.2	11,402	399.9	87.9	92.1
Cumberland	921.9	9,805	345.6	81.6	83.5
Dauphin	2,577.0	27,039	1,293.6	263.2	281.2
Franklin	342.3	4,210	139.0	31.1	32.5
Lancaster	2,238.7	24,902	857.8	203.3	206.5
Lebanon	227.6	3,004	109.5	22.2	24.1
Perry	51.7	740	16.1	4.2	4.2
York	1,062.7	13,031	454.7	99.2	104.3
Region Total	\$9,124.8	102,015	\$3,914.5	\$861.8	\$899.3

# Lehigh Valley

- The Lehigh Valley region is comprised the following counties: Lehigh and Northampton.
- Travelers spent close to \$2.4 billion in the Lehigh Valley region in 2018 – a new record high and a 2.8% increase from 2017.
- With its close proximity to the New York, Philadelphia, and New Jersey markets, a strong day-trip segment, and numerous regional attractions, the Lehigh Valley region continued to post the highest proportion of traveler spending going to recreation among the state’s 11 tourism regions, but the lowest share going to transportation and the second lowest shares going to lodging and shopping in 2018.

## Lehigh Valley Region 2018 Spending by Category



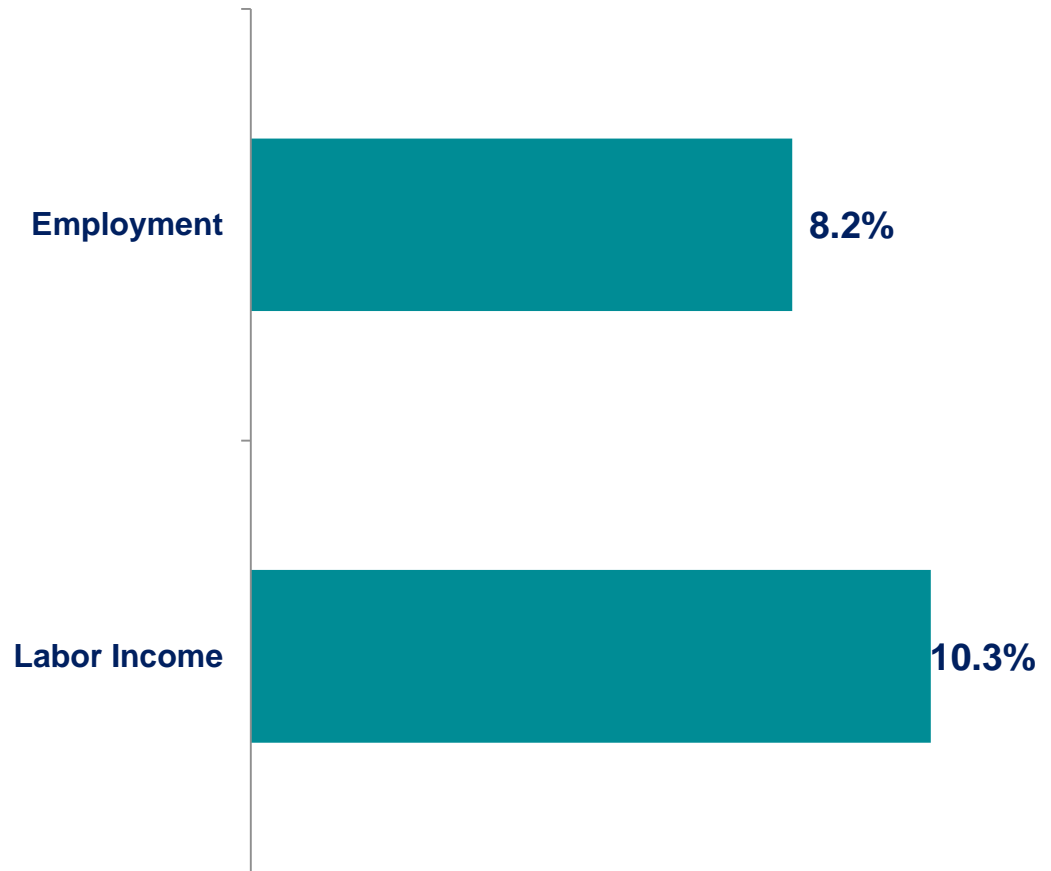
Source: Tourism Economics

# Lehigh Valley

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- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- The travel industry was responsible for 8.2% of the region's employment and 10.3% of labor income in 2018 – little changed from 2017.
- As in prior years, the region continued to ranked 6<sup>th</sup> among the state's 11 tourism regions in the actual number of travel-supported jobs and 9<sup>th</sup> in the industry's share of regional employment in 2018.

**Travel Industry Share of Regional Economy**



# Lehigh Valley – Traveler Spending & Employment Timelines

## LEHIGH VALLEY TRAVELER SPENDING, 2008 – 2018 (dollar amounts in millions)

County	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Lehigh	\$1,061.4	\$872.1	\$925.4	\$996.3	\$1,030.7	\$1,041.7	\$1,054.4	\$1,127.8	\$1,169.2	\$1,240.9	\$1,313.5
Northampton	581.2	518.3	596.1	761.4	827.0	863.9	921.8	981.5	1,029.0	1,067.3	1,059.5
Region Total	\$1,642.6	\$1,390.4	\$1,521.4	\$1,757.7	\$1,857.7	\$1,905.6	\$1,976.2	\$2,109.4	\$2,198.1	\$2,308.2	\$2,373.0
% Change	11.7%	-15.4%	9.4%	15.5%	5.7%	2.6%	3.7%	6.7%	4.2%	5.0%	2.8%

## LEHIGH VALLEY TRAVEL INDUSTRY EMPLOYMENT, 2008 – 2018

County	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Lehigh	8,274	7,732	7,555	7,624	7,838	7,970	7,983	8,119	8,356	8,590	8,667
Northampton	5,208	5,074	5,448	5,816	6,180	6,789	6,920	7,127	7,407	7,611	7,747
Region Total	13,482	12,806	13,003	13,440	14,018	14,760	14,903	15,246	15,764	16,201	16,414
% Change	1.0%	-5.0%	1.5%	3.4%	4.3%	5.3%	1.0%	2.3%	3.4%	2.8%	1.3%

# Lehigh Valley –Traveler Spending by Category

## LEHIGH VALLEY TRAVELER SPENDING BY CATEGORY, 2017 and 2018 (dollar amounts in millions)

2018	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Lehigh	\$150.9	\$311.5	\$244.2	\$261.6	\$345.3	\$1,313.5
Northampton	108.6	196.9	129.8	392.1	232.1	1,059.5
Region Total	\$259.5	\$508.4	\$374.0	\$653.7	\$577.4	\$2,373.0
% Change	2.8%	4.0%	1.3%	1.2%	4.7%	2.8%

2017	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Lehigh	\$140.9	\$296.5	\$236.2	\$249.7	\$317.5	\$1,240.9
Northampton	111.6	192.5	133.1	396.0	234.1	1,067.3
Region Total	\$252.5	\$489.0	\$369.3	\$645.8	\$551.6	\$2,308.2

# Lehigh Valley – Tourism Satellite Account

## LEHIGH VALLEY TOURISM SATELLITE ACCOUNT CATEGORIES, 2017 and 2018 (dollar amounts in millions)

2018	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Lehigh	\$1,313.5	\$3.7	\$54.2	\$1,371.4
Northampton	1,059.5	3.2	43.7	1,106.4
Region Total	\$2,373.0	\$6.8	\$97.9	\$2,477.7
% Change	2.8%	-0.1%	-0.4%	2.7%

2017	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Lehigh	\$1,240.9	\$3.7	\$52.8	\$1,297.4
Northampton	1,067.3	3.2	45.4	1,115.9
Region Total	\$2,308.2	\$6.8	\$98.2	\$2,413.2

\*Non-Travel Personal Consumption Expenditures represent travel-related consumer durable purchases, such as an RV, boat, or furniture for a vacation home.



# Lehigh Valley –Travel Industry Impacts, 2017 & 2018

## LEHIGH VALLEY TRAVEL INDUSTRY IMPACTS, 2016 and 2017 (dollar amounts in millions)

2018	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Lehigh	\$1,313.5	8,667	\$288.4	\$71.1	\$65.2
Northampton	1,059.5	7,747	333.5	66.5	66.2
Region Total	\$2,373.0	16,414	\$622.0	\$137.7	\$131.4
% Change	2.8%	1.3%	1.7%	2.2%	4.2%

2017	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Lehigh	\$1,240.9	8,590	\$279.4	\$67.8	\$61.2
Northampton	1,067.3	7,611	332.5	66.9	64.9
Region Total	\$2,308.2	16,201	\$611.9	\$134.7	\$126.1

# Lehigh Valley –Travel Economy Impacts, 2017 & 2018

## LEHIGH VALLEY TRAVEL ECONOMY IMPACTS, 2017 and 2018 (dollar amounts in millions)

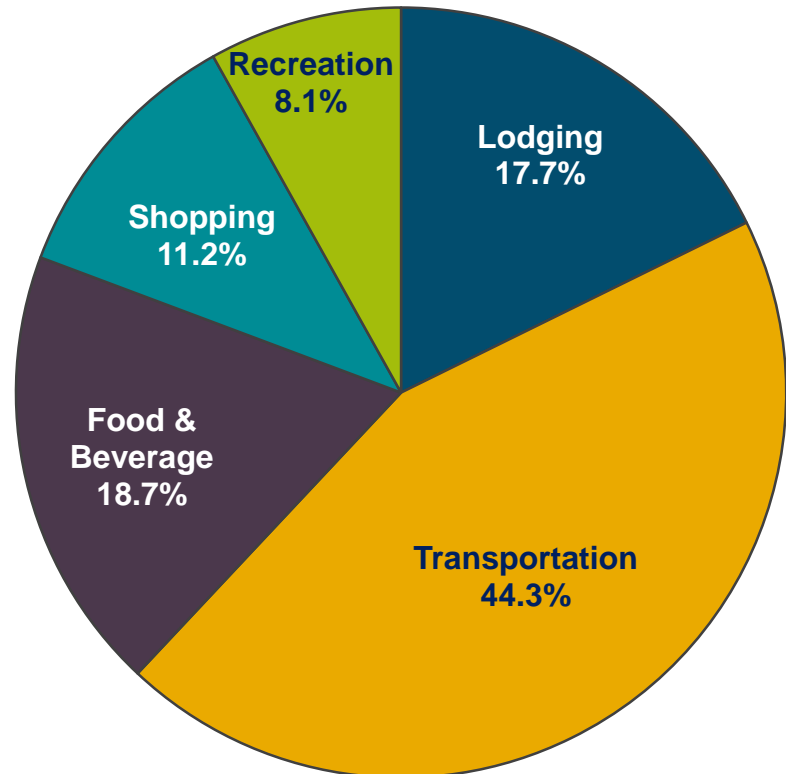
2018	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Lehigh	\$1,371.4	13,400	\$544.6	\$123.7	\$131.3
Northampton	1,106.4	11,898	626.3	116.6	133.6
Region Total	\$2,477.7	25,298	\$1,170.9	\$240.3	\$264.9
% Change	2.7%	0.6%	1.2%	1.8%	4.1%

2017	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Lehigh	\$1,297.4	13,378	\$523.7	\$118.5	\$123.4
Northampton	1,115.9	11,760	632.9	117.4	131.1
Region Total	\$2,413.2	25,138	\$1,156.7	\$235.9	\$254.4

# Philadelphia & The Countryside

- Philadelphia and The Countryside region is comprised of the following counties: Bucks, Chester, Delaware, Montgomery, and Philadelphia.
- Travelers spent close to \$10.6 billion in the Philadelphia & The Countryside region in 2018 – a new record high and 5.4% increase from 2017. Both the percent increase and total dollar increase in traveler spending were the strongest of the state's 11 tourism regions.
- As in prior years, the region continued to have the highest proportion of traveler spending on transportation and lodging and the lowest proportions on recreation, food & beverages, and shopping of the state's 11 tourism regions.

## Philadelphia & The Countryside Region 2018 Spending by Category

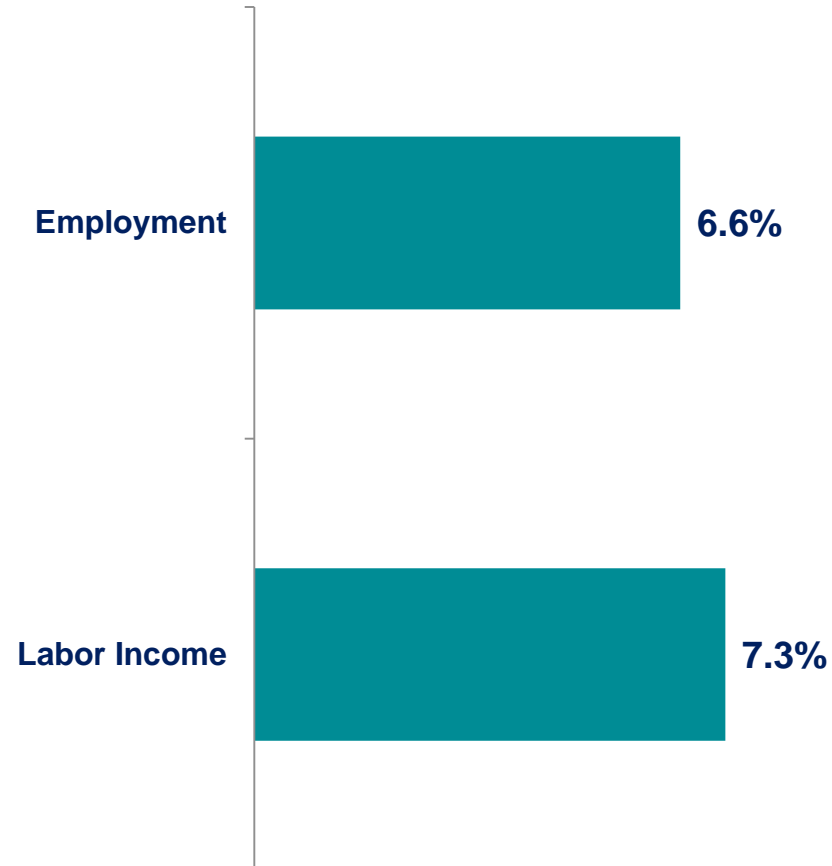


Source: Tourism Economics

# Philadelphia and The Countryside

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total economy.
- The region continued to have the highest number of jobs supported by the travel industry among the state's tourism regions in 2018, but the industry's contributions to the region's total labor income and employment were the smallest of the regions due to the size and diversity of the region's economy.
- The travel-supported labor income share for the Philadelphia and the Countryside region was 7.3% in 2018 – a 0.1 percentage point increase from 2017, while the industry's share of the region's employment base was down by the same amount.

**Travel Industry Share of Regional Economy**



# Philadelphia & The Countryside – Traveler Spending & Employment Timelines

## PHILADELPHIA AND THE COUNTRYSIDE TRAVELER SPENDING, 2008 – 2018 (dollar amounts in millions)

County	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Bucks	\$704.5	\$629.2	\$673.2	\$728.0	\$743.6	\$742.1	\$759.9	\$795.5	\$814.4	\$831.7	\$877.2
Chester	680.1	608.2	646.7	684.2	713.8	730.4	735.6	760.1	772.5	800.2	847.2
Delaware	613.9	530.4	564.5	654.5	645.8	642.1	655.4	658.6	667.8	692.4	747.7
Montgomery	1,176.2	1,014.2	1,070.8	1,180.2	1,221.8	1,244.9	1,271.9	1,327.0	1,361.1	1,390.3	1,420.3
Philadelphia	5,334.7	4,736.2	5,044.0	5,290.9	5,389.9	5,590.6	5,683.1	5,836.8	6,073.9	6,298.9	6,658.5
Region Total	\$8,509.5	\$7,518.1	\$7,999.1	\$8,537.9	\$8,714.9	\$8,950.1	\$9,105.9	\$9,378.1	\$9,689.8	\$10,013.5	\$10,550.9
% Change	9.8%	-11.7%	6.4%	6.7%	2.1%	2.7%	1.7%	3.0%	3.3%	3.3%	5.4%

## PHILADELPHIA AND THE COUNTRYSIDE TRAVEL INDUSTRY EMPLOYMENT, 2008 – 2018

County	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Bucks	8,795	8,482	8,389	8,568	8,717	8,776	8,850	8,999	9,161	9,235	9,418
Chester	7,286	6,983	6,823	6,879	7,052	7,176	7,288	7,397	7,499	7,679	7,845
Delaware	6,936	6,701	6,697	6,936	7,158	7,360	7,486	7,535	7,696	7,850	8,006
Montgomery	12,983	12,380	12,159	12,337	13,008	13,366	13,430	13,618	13,965	14,147	14,318
Philadelphia	33,755	31,929	32,221	32,669	33,628	34,415	34,803	35,577	36,361	37,046	37,953
Region Total	69,755	66,474	66,289	67,390	69,563	71,093	71,857	73,127	74,683	75,958	77,540
% Change	0.7%	-4.7%	-0.3%	1.7%	3.2%	2.2%	1.1%	1.8%	2.1%	1.7%	2.1%

# Philadelphia & The Countryside – Traveler Spending by Category

## PHILADELPHIA AND THE COUNTRYSIDE TRAVELER SPENDING BY CATEGORY, 2017 and 2018 (dollar amounts in millions)

2018	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Bucks	\$154.5	\$199.3	\$124.3	\$91.7	\$307.5	\$877.2
Chester	157.7	193.0	126.8	89.4	280.3	847.2
Delaware	127.4	178.8	106.6	82.1	252.7	747.7
Montgomery	359.3	283.8	174.0	103.2	500.0	1,420.3
Philadelphia	1,070.7	1,119.8	647.8	489.6	3,330.6	6,658.5
<b>Region Total</b>	<b>\$1,869.7</b>	<b>\$1,974.7</b>	<b>\$1,179.5</b>	<b>\$855.9</b>	<b>\$4,671.1</b>	<b>\$10,550.9</b>
% Change	7.8%	7.1%	4.0%	5.3%	4.1%	5.4%

2017	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Bucks	\$143.1	\$186.4	\$119.7	\$90.0	\$292.6	\$831.7
Chester	145.7	180.3	120.8	87.1	266.3	800.2
Delaware	110.5	163.9	99.5	80.4	238.2	692.4
Montgomery	350.0	273.1	173.5	103.7	489.9	1,390.3
Philadelphia	985.5	1,040.7	620.6	451.6	3,200.5	6,298.9
<b>Region Total</b>	<b>\$1,734.9</b>	<b>\$1,844.3</b>	<b>\$1,134.0</b>	<b>\$812.8</b>	<b>\$4,487.5</b>	<b>\$10,013.5</b>

# Philadelphia & The Countryside – Tourism Satellite Account

## PHILADELPHIA AND THE COUNTRYSIDE TOURISM SATELLITE ACCOUNT CATEGORIES, 2017 and 2018 (dollar amounts in millions)

2018	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Bucks	\$877.2	\$3.5	\$36.2	\$916.9
Chester	847.2	3.5	34.9	885.6
Delaware	747.7	2.9	30.8	781.4
Montgomery	1,420.3	5.3	58.6	1,484.1
Philadelphia	6,658.5	68.1	274.6	7,001.2
Region Total	\$10,550.9	\$83.2	\$435.1	\$11,069.2
% Change	5.4%	0.1%	2.1%	5.2%

2017	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Bucks	\$831.7	\$3.4	\$35.4	\$870.6
Chester	800.2	3.4	34.1	837.7
Delaware	692.4	2.9	29.5	724.8
Montgomery	1,390.3	5.3	59.2	1,454.7
Philadelphia	6,298.9	68.0	268.0	6,635.0
Region Total	\$10,013.5	\$83.1	\$426.1	\$10,522.7

\*Non-Travel Personal Consumption Expenditures represent travel-related consumer durable purchases, such as an RV, boat, or furniture for a vacation home.

# Philadelphia & The Countryside – Travel Industry Impacts, 2017 & 2018

## PHILADELPHIA AND THE COUNTRYSIDE TRAVEL INDUSTRY IMPACTS, 2017 and 2018 (dollar amounts in millions)

2018	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Bucks	\$877.2	9,418	\$307.1	\$61.0	\$58.9
Chester	847.2	7,845	285.7	58.2	55.5
Delaware	747.7	8,006	324.8	56.2	58.7
Montgomery	1,420.3	14,318	551.5	104.7	102.8
Philadelphia	6,658.5	37,953	2,173.9	481.1	426.5
Region Total	\$10,550.9	77,540	\$3,643.1	\$761.2	\$702.3
% Change	5.4%	2.1%	4.3%	6.4%	6.6%

2017	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Bucks	\$831.7	9,235	\$296.5	\$56.5	\$55.6
Chester	800.2	7,679	275.9	53.7	52.2
Delaware	692.4	7,850	310.7	53.0	54.7
Montgomery	1,390.3	14,147	535.8	97.8	98.2
Philadelphia	6,298.9	37,046	2,073.2	454.3	397.9
Region Total	\$10,013.5	75,958	\$3,492.1	\$715.3	\$658.7



# Philadelphia & The Countryside – Travel Economy Impacts, 2017 & 2018

## PHILADELPHIA AND THE COUNTRYSIDE TRAVEL ECONOMY IMPACTS, 2017 and 2018 (dollar amounts in millions)

2018	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Bucks	\$916.9	16,376	\$583.9	\$104.8	\$119.0
Chester	885.6	13,458	538.7	99.7	112.1
Delaware	781.4	13,820	593.2	98.3	118.6
Montgomery	1,484.1	24,065	1,027.6	179.7	207.8
Philadelphia	7,001.2	59,538	3,931.6	801.6	860.9
Region Total	\$11,069.2	127,258	\$6,675.0	\$1,284.1	\$1,418.4
% Change	5.2%	1.0%	2.1%	5.4%	6.6%

2017	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Bucks	\$870.6	16,213	\$559.4	\$98.8	\$112.3
Chester	837.7	13,273	520.1	93.6	105.5
Delaware	724.8	13,721	576.5	93.1	110.8
Montgomery	1,454.7	23,951	1,001.1	171.5	198.6
Philadelphia	6,635.0	58,803	3,878.3	761.2	803.6
Region Total	\$10,522.7	125,962	\$6,535.5	\$1,218.2	\$1,330.6

**Explanations**  
**Data Sources**  
**Methodology**  
**Tourism Economics**



**TOURISM  
ECONOMICS**

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# Why quantify the tourism economy?

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- By monitoring the impact of PA's travel and tourism industry's on the state's economy, policymakers can make informed decisions regarding the funding and prioritization of tourism development.
- Monitoring and quantifying travel and tourism's economic impact also enables policymakers and those involved in the industry to carefully monitor the industry's successes and determine future needs.
- In order to do this, tourism must be measured in the same manner as other economic sectors – i.e., tax generation, employment, wages, and gross domestic product.

# Why is this a challenge?

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- Most industry sectors, such as manufacturing, construction, financial services, insurance, and health care, for example, are easily defined within the country's national accounts statistics, with economic data specific to each industry computed and provided according to the industry's NAICS (North American Industry Classification System) code.
- The economic contributions of travel and tourism are not so easily measured and calculated because it is not a single industry but is responsible for varying amounts of economic activity in nearly a dozen industrial sectors, including lodging, recreation, retail, real estate, air passenger transport, food & beverage, car rentals, taxi services, and travel agents that are identified in the national accounts and each with its own unique NAICS code.
- A major challenge is determining the amount of economic activity attributable to travel and tourism by each of these industries versus the amount attributable to local residents. The share attributable to travelers differs for each industry, both directly and indirectly.

# The Tourism Satellite Account

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- The Tourism Satellite Account, or TSA, was conceived by the United Nations World Tourism Organization to estimate the total economic impact of the tourism industry on a nation's economy, including capital investment and government spending in addition to traveler spending.
- The TSA standard has since been ratified by the United Nations, Eurostat, and the Organization for Economic Cooperation and Development (OECD) and has been adopted by over 50 countries around the world, including the U.S., as well as a growing number of states.
- The U.S. Bureau of Economic Analysis (BEA) uses the TSA methodology to determine the economic contributions of business and leisure travelers to the U.S. economy, issuing quarterly and annual estimates for the nation under the Travel and Tourism Satellite Account (TTSA).
- The BEA presents TTSA estimates of traveler spending on 24 types of goods and services, as well as estimates of the income generated by travel and tourism and the output and employment generated by U.S. travel and tourism-related industries.

# Benefits of the Tourism Satellite Account

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Benefits of using the TSA methodology include:

- Provides a stable and consistent definition of the travel and tourism economy.
- Provides a methodology for calculating travel and tourism Gross Domestic Product (GDP) in a way that is consistent with economic accounts and that enables comparisons of the importance of travel and tourism relative to other sectors of the economy in terms of GDP, employment, and income.
- Allows for benchmarking relative to other destinations.
- Tracks the economic contribution of the travel and tourism industry over time.
- Monitors the industry's strength by tracking capital investments made in travel- and tourism-related projects.
- Allows for an analysis of the full impact of travel and tourism, i.e., the direct impact from sales made to travelers, the indirect impact from supplier contributions, induced impact derived from the spending of persons employed either directly or indirectly in the travel and tourism economy, government spending, and private sector investments.

# Data Sources

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- Domestic traveler expenditure estimates are derived from a representative survey of U.S. travelers provided by Longwoods International. The estimates are broken out by sectors (lodging, transport at destination, food & beverage, retail, and recreation), by purpose (business and leisure), and by type of stay (day and overnight).
- Tourism Economics (TE) then adjusts these levels of spending based on a range of known measures of travel and tourism activity:
  - Overseas traveler spending (source: National Travel and Tourism Office, TE)
  - Canadian traveler spending (source: Statistics Canada, TE)
  - Bed tax receipts
  - Sales tax by sector
  - Spending on air travel which accrues to all airports and locally-based airlines
  - Gasoline purchases by visitors (source: TE calculation)
  - Smith Travel Research data on hotel revenues
  - Construction Value by McGraw-Hill Construction
  - Industry data on employment, wages, GDP, and sales (source: U.S. Bureau of Economic Analysis, U.S. Bureau of Labor Statistics, U.S. Census Bureau)

# Methodology

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- An IMPLAN model was compiled for the Commonwealth of Pennsylvania, tracing the flow of traveler-related expenditures through the local economy and their effects on employment, wages, and taxes. The IMPLAN model also provides estimates of the indirect (supplier) and induced (income) impacts of travel and tourism.
- All results are benchmarked and cross-checked and adjusted based on the following:
  - U.S. Bureau of Labor Statistics and Bureau of Economic Analysis (employment and wages by industry)
  - U.S. Census (business sales by industry)
- Employment rankings are based on U.S. Bureau of Labor Statistics employment statistics (ES202/QCEW) data.



# About Tourism Economics

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Tourism Economics is an Oxford Economics company with a singular objective: combine an understanding of tourism dynamics with rigorous economics in order to answer the most important questions facing destinations, developers, and strategic planners. By combining quantitative methods with industry knowledge, Tourism Economics designs custom market strategies, destination recovery plans, tourism forecasting models, tourism policy analysis, and economic impact studies.

With over four decades of experience of our principal consultants, it is our passion to work as partners with our clients to achieve a destination's full potential.

Oxford Economics is one of the world's leading providers of economic analysis, forecasts and consulting advice. Founded in 1981 as a joint venture with Oxford University's business college, Oxford Economics enjoys a reputation for high quality, quantitative analysis and evidence-based advice. For this, it draws on its own staff of more than 120 professional economists; a dedicated data analysis team; global modeling tools, and a range of partner institutions in Europe, the US and in the United Nations Project Link. Oxford Economics has offices in London, Oxford, Dubai, Philadelphia, and Belfast.

For more information:

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