



TOURISM  
ECONOMICS

AN OXFORD ECONOMICS COMPANY

# Economic Impact of Travel and Tourism in Pennsylvania - 2022

February 2024

Prepared for: Pennsylvania Office of Tourism



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## INTRODUCTION

# PROJECT BACKGROUND

The travel sector and tourism is an integral part of the Pennsylvania economy. Travelers generate significant economic benefits to households, businesses, and government. This economic activity represents a critical driver of the state's economy. In 2022, traveler activity supported 6.1% of all jobs in the state and the increase in visitor activity in 2022 created \$420 million more in state and local governmental revenues.

By monitoring the travel and tourism economy, policymakers can inform decisions regarding the funding and prioritization of the sector's development.

This is particularly important for Pennsylvania as its travel and tourism economy continues to rebound from 2020's massive decline. By establishing a timeline of economic impacts, the industry can track its progress.

To quantify the significance of the travel and tourism economy in Pennsylvania, Tourism Economics developed a comprehensive model detailing the far-reaching impacts arising from visitor spending. The results of this study show the scope of the travel and tourism economy in terms of direct visitor spending, along with total economic impacts, jobs, and fiscal (tax) impacts in the broader economy. The analysis draws on the following data sources:

### METHODOLOGY AND DATA SOURCES

An IMPLAN input-output model was constructed for Pennsylvania. The model traces the flow of traveler-related expenditures through the state's economy and their effects on employment, wages, and taxes. IMPLAN also quantifies the indirect (supplier) and induced (income) impacts of tourism. Tourism Economics then cross-checked these findings with employment and wage data for each sector to ensure the findings are within reasonable ranges.

Travelers include those who stayed overnight or traveled more than 50 miles to the destination on a day-trip. The primary source of the employment and wage data is the Regional Economic Information System (REIS), maintained by the Bureau of Economic Analysis. This is more comprehensive than Bureau of Labor Statistics (ES202/QCEW) data because sole-proprietors do not require unemployment insurance and are not counted in ES202 data.

- Longwoods International: survey data, including spending and visitor totals for domestic travelers to and within Pennsylvania
- STR hotel performance data, including room demand, room rates, occupancy, and room revenue, for hotels
- Tax collections: Room tax and sales tax receipts for select industries. Data for both state and county geographies
- Bureau of Economic Analysis and Bureau of Labor Statistics: employment and wage data by industry
- Tourism Economics: international travel data for overseas, Canadian, and Mexican travel to Pennsylvania based on aviation, survey, and credit card information

# ECONOMIC IMPACTS

## KEY FINDINGS

### VISITOR SPENDING

Travelers and tourists spent \$45.4 billion in Pa in 2022, a nearly 20% increase from 2021 and just 1.5% below 2019's pre-pandemic level. The increase was driven by growth in business and overnight travel, with increases in both the number of higher-spending travelers and international arrivals. Total visitor volume in Pa surpassed 192 million in 2022, recovering to within 9% of its pre-pandemic level.



**192.4 MILLION**  
Total Travelers in  
Pennsylvania in 2022



**12.2 MILLION**  
Increase in Travelers  
to Pennsylvania



**\$28.0B**  
Spending by  
Overnight  
Visitors



**\$17.3B**  
Spending by  
Day Visitors



**\$45.4B**  
Visitor  
Spending

### TOTAL ECONOMIC IMPACT

Travelers spent \$45.4 billion in Pennsylvania in 2022, generating a total economic impact of \$76.7 billion when indirect and induced impacts are included. This total economic impact supported more than 486,000 jobs and generated \$4.7 billion in state and local tax revenues in 2022.



**\$76.7 BILLION**  
Total Economic Impact of Travel and Tourism  
in Pennsylvania in 2022

### SUMMARY ECONOMIC IMPACTS Pennsylvania Tourism (2022)



**\$45.4B**  
Direct Visitor  
Spending



**\$76.7B**  
Total  
Economic  
Impact



**486,871**  
Total  
Jobs  
Supported



**\$4.7B**  
State & Local  
Taxes  
Generated



## VISITS & TRAVELER SPENDING

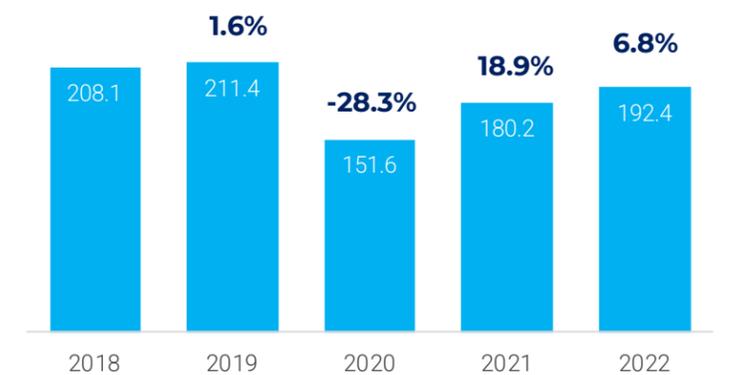
In 2022, traveler spending in Pennsylvania continued to regain the ground lost due to the pandemic. With growth in overnight visits and business travel recovering, traveler spending increased 19% to within 1.5 percent of pre-pandemic levels. While Pa's visitor volume increases were strong, they were tempered by moderating growth in day-trips impacted by the rise in gasoline prices.

### VISITOR VOLUME

Pennsylvania hosted an estimated 192.4 million travelers in 2022, a 6.8%, or 12.2 million, increase from the prior year. The increase was due to the 12% increase in the number of overnight travelers, with total visitation reaching 91% of its pre-pandemic (2019) level.

#### Pennsylvania visitor volume

Amounts in millions



Sources: Longwoods International, Tourism Economics

### VISITOR SPENDING

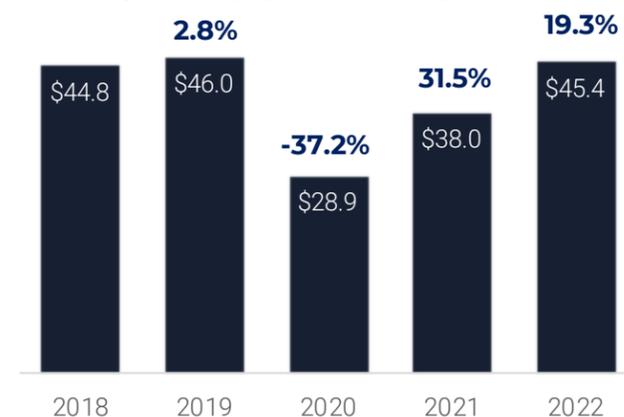
Traveler spending in 2022 continued to recover from the pandemic losses to reach 99% of its 2019 level.

Led by the increase in the number of higher spending travelers, Pennsylvania visitor spending reached \$45.4 billion in 2022. Spending grew \$7.5 billion from 2021, remaining roughly \$700 million below its pre-pandemic level.

Transportation spending, including the value of the airport to the state's economy, remained the largest spending category in 2022 representing 31% of travelers' total trip budget.

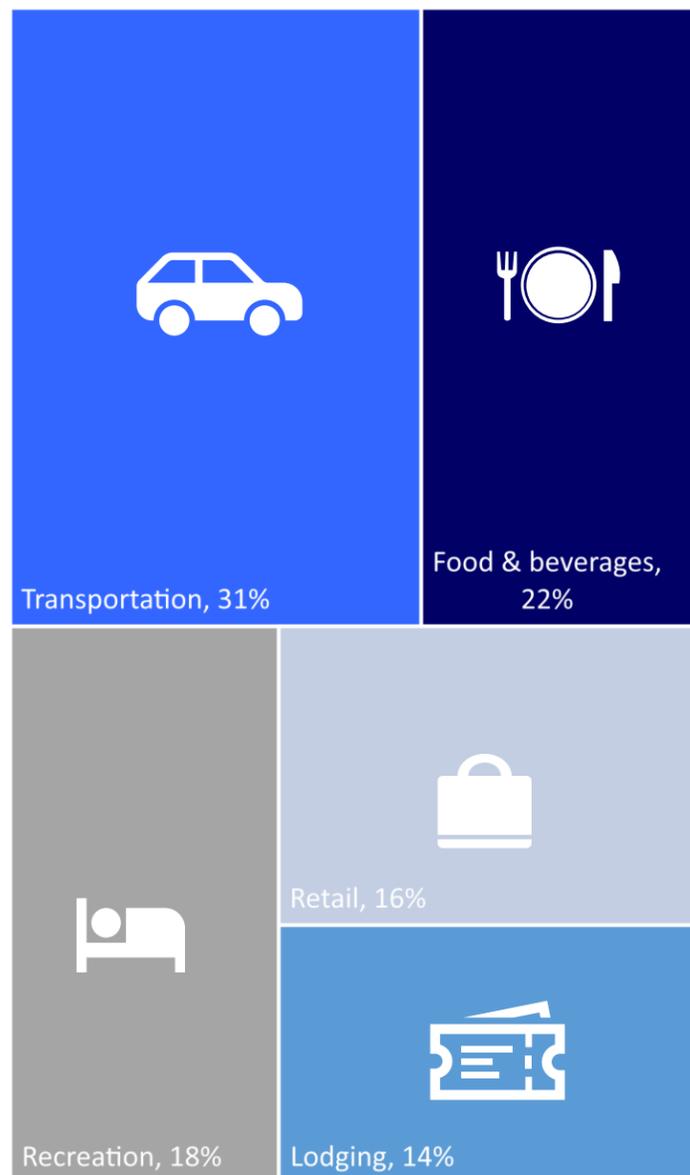
The \$9.8 billion travelers spent on food & beverages in 2022 – at businesses from restaurants to grocery stores – accounted for 22% of the traveler dollar, with another 18% spent on recreational activities, 16% on retail sales, and 14% on lodging expenses.

#### Visitor Spending (in \$billions)



Sources: Longwoods International, Tourism Economics

 **\$45.4 BILLION**  
Visitor Spending in 2022



Source: Tourism Economics

Note: Lodging spending includes dollars spent on short-term rentals and other second home spending. Transport includes both air and local transportation.

## VISITOR SPENDING CATEGORY TRENDS

Spending grew across all travel and tourism spending categories in 2022 with the strongest gains in areas impacted by the increase in overnight travelers and interest in experiences – lodging and recreation. Recreational spending and lodging spending both rose 26% in 2022 from the prior year.

Transportation spending by travelers, which includes the value of the airports in Pennsylvania, increased \$2.2 billion to recover to within four percent of its pre-pandemic level.

Lodging spending grew to 95% of its pre-pandemic levels, a strong rebound considering its nearly 50% drop in 2020.

Spending by travelers in 2022 on recreational activities and retail shopping both surpassed their pre-pandemic levels.

## VISITOR SEGMENTS

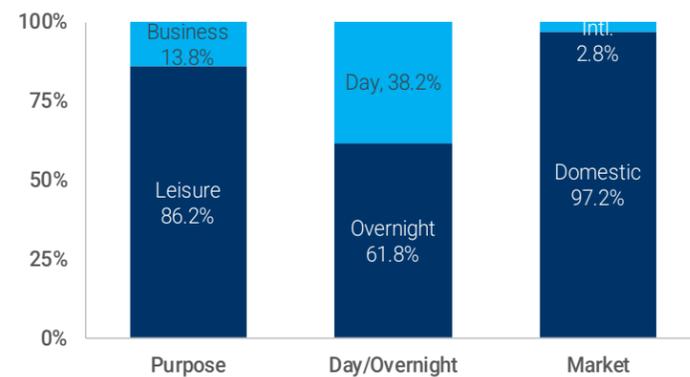
Spending by overnight travelers led Pa's recovery, growing by \$4.8 billion to \$28.0 billion in 2022. The increase in overnight spending represented 65% of 2022's overall spending gain, with the segment accounting for 62% of the total traveler spending. Per person spending by overnight travelers rose 8% from 2021 to \$419 per person-trip.

Spending by day-trip travelers grew to \$17.3 billion in 2022, a 17% increase from 2021 and a new record high.

Per person spending increased for both overnight and day-trip travel, with the overnight per person spend three times higher than that of the day-trip segment's \$139 in 2022.

### Pennsylvania spending share by segment

Percent % of visitor spending by market



Source: Tourism Economics

## Pennsylvania visitor spending and annual growth

Amounts in \$ millions, 2022 % change, and % recovered relative to 2022

|                               | 2018            | 2019            | 2020            | 2021            | 2022            | 2022 Growth  | % relative to 2019 |
|-------------------------------|-----------------|-----------------|-----------------|-----------------|-----------------|--------------|--------------------|
| <b>Total visitor spending</b> | <b>\$44,788</b> | <b>\$46,041</b> | <b>\$28,909</b> | <b>\$38,017</b> | <b>\$45,351</b> | <b>19.3%</b> | <b>98.5%</b>       |
| Lodging*                      | \$6,281         | \$6,445         | \$3,416         | \$4,869         | \$6,140         | 26.1%        | 95.3%              |
| Food & beverage               | \$9,514         | \$9,860         | \$6,931         | \$8,335         | \$9,839         | 18.0%        | 99.8%              |
| Retail                        | \$6,888         | \$7,042         | \$5,352         | \$6,495         | \$7,105         | 9.4%         | 100.9%             |
| Recreation                    | \$7,689         | \$8,050         | \$4,921         | \$6,526         | \$8,253         | 26.5%        | 102.5%             |
| Transportation**              | \$14,416        | \$14,643        | \$8,289         | \$11,792        | \$14,014        | 18.8%        | 95.7%              |

Source: Tourism Economics

\* Lodging includes second home spending

\*\* Transportation includes both ground and air transportation

## Visitor volume and spending

Amounts in mils of persons, \$ millions, and \$ per person

|                               | 2018            | 2019            | 2020            | 2021            | 2022            |
|-------------------------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| <b>Total visitors</b>         | <b>205.7</b>    | <b>209.1</b>    | <b>151.0</b>    | <b>179.8</b>    | <b>191.3</b>    |
| Day                           | 134.3           | 136.5           | 107.5           | 120.0           | 124.5           |
| Overnight                     | 71.4            | 72.7            | 43.6            | 59.8            | 66.8            |
| <b>Total visitor spending</b> | <b>\$44,788</b> | <b>\$46,041</b> | <b>\$28,909</b> | <b>\$38,017</b> | <b>\$45,351</b> |
| Day                           | \$16,104        | \$16,722        | \$13,163        | \$14,812        | \$17,343        |
| Overnight                     | \$28,684        | \$29,319        | \$15,746        | \$23,205        | \$28,008        |
| <b>Per visitor spending</b>   | <b>\$218</b>    | <b>\$220</b>    | <b>\$191</b>    | <b>\$211</b>    | <b>\$237</b>    |
| Day                           | \$120           | \$123           | \$123           | \$123           | \$139           |
| Overnight                     | \$402           | \$404           | \$361           | \$388           | \$419           |

Source: Tourism Economics

## VISITOR SPENDING BY SEGMENT - DOLLAR AMOUNT

Visitor spending in 2022 increased for all the major spending categories, led by the \$2.2 billion increase in spending on transportation, which accounted for 30% of the \$7.3 billion increase in total traveler spending. Transportation's increase was derived from increases in visitation and gas prices and the recovery in air travel.

Spending on recreation fully recovered from 2020's steep losses as interest in activities and an increase in events helped the segment reach \$8.3 billion in visitor spending, a \$1.7 billion increase from 2021. Visitor spending on recreation was 3% above 2019 levels after falling to 61% of 2019 levels in 2020.

Traveler spending on lodging and food & beverages grew by \$1.3 billion and \$1.5 billion, respectively, in 2022 with lodging's recovery, while strong, still the weakest of the five spending segments at 95% of its 2019 spending level.

### Visitor spending by segment in Pennsylvania, 2018-2022

in \$ millions



Source: Tourism Economics

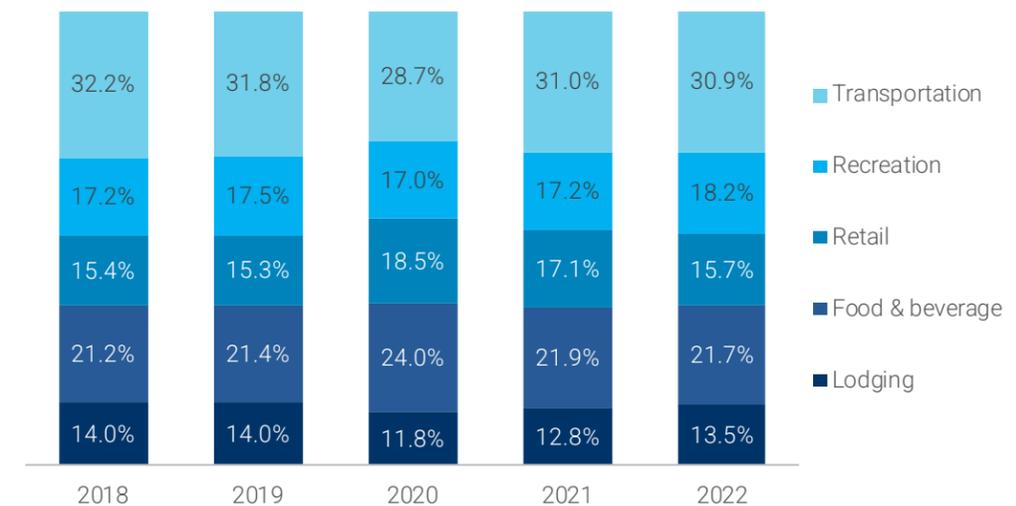
## VISITOR SPENDING BY SEGMENT - SHARES

Despite the rebound in spending for each category, the relative share of the traveler dollar spent on the various segments was still a bit skewed in 2022 relative to 2019's more normal spending pattern. Whether this signals an ongoing shift is yet to be determined as travel continues to return to normal. For example, the share of total traveler dollars spent on lodging in 2022 was 13.5%, a half percentage point below its 14% pre-pandemic average, but rebounding from 12% in 2020.

Transportation spending, including the overall impact of air travel, approached 31% of the travel spending budget for Pennsylvania travelers in 2022, roughly a percentage point below its pre-pandemic level. Retail, which had increased its visitor spending share to 18.5% in 2020, remained somewhat elevated in 2022 from its pre-pandemic level of 15.3% despite dropping to 15.7% in 2022.

### Visitor spending shares in Pennsylvania, 2018-2022

By category, %



Source: Tourism Economics

## TRAVEL ECONOMY TRENDS

The travel economy looks at a broader range of travel- and tourism-related expenditures than just visitor spending. These include government support, capital investments (both new construction and machinery and equipment), and the purchase of travel-related durable goods, such as RVs, boats, and furnishings for a vacation home.

Total traveler economy demand approached \$48 billion in 2022, led by domestic traveler spending that reached a new record high of \$44.1 billion. Capital investment in support of the travel industry grew to close to \$2.0 billion in 2022, an increase of 9% over 2021.

### Travel- and Tourism-Related Capital Investment (CAPEX)

|                            | 2018           | 2019           | 2020           | 2021           | 2022           |
|----------------------------|----------------|----------------|----------------|----------------|----------------|
| <b>Total Tourism CAPEX</b> | <b>\$2,376</b> | <b>\$2,366</b> | <b>\$1,710</b> | <b>\$1,808</b> | <b>\$1,965</b> |
| Machinery & equip.         | \$1,058        | \$1,086        | \$698          | \$916          | \$1,112        |
| Construction               | \$1,318        | \$1,279        | \$1,013        | \$892          | \$853          |

Sources: Oxford Economics, Tourism Economics

## TRAVEL ECONOMY DISTRIBUTION

Spending by domestic (U.S.) travelers was responsible for the vast majority of the travel and tourism industry's recovery in Pennsylvania, providing 92.1% of demand in 2022. Government support also contributed to the recovery, but to a much lesser degree.

While spending by international travelers rose, it remained far below its pre-pandemic level when it accounted for 6% of Pennsylvania's total travel demand before falling to 1.3% in 2021. In 2022, the segment essentially doubled its share of the state's total travel demand vs. 2021, reaching 2.7% with close to \$1.3 billion in traveler spending in 2022.

Capital investment in travel- and tourism-related construction and machinery & equipment represented 4.1% of all traveler economy demand in 2022. This is down substantially from 2019, completely due to the 33% drop in construction spending that was at least partially tied to the economy's rising loan interest rates.

The governmental support share was 0.6% of all Pennsylvania tourism demand in 2022, up from 0.5% in 2019.

### Pennsylvania travel- and tourism-related demand

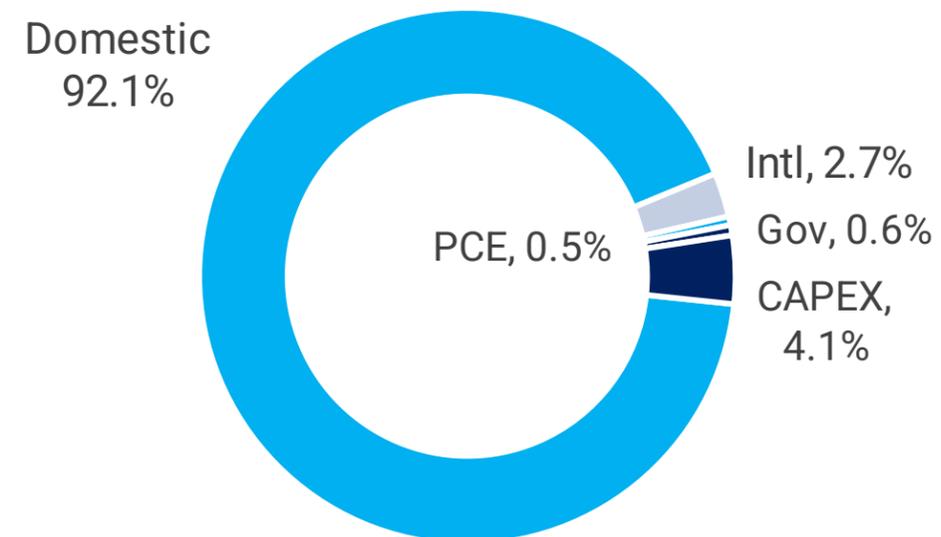
Amounts in \$ millions, 2022 % change, and % relative to 2019

|                             | 2018            | 2019            | 2020            | 2021            | 2022            | 2022 Growth  | % relative to 2019 |
|-----------------------------|-----------------|-----------------|-----------------|-----------------|-----------------|--------------|--------------------|
| <b>TOTAL</b>                | <b>\$47,704</b> | <b>\$48,973</b> | <b>\$30,960</b> | <b>\$40,276</b> | <b>\$47,862</b> | <b>18.8%</b> | <b>97.7%</b>       |
| Domestic Visitor Spend      | \$41,821        | \$43,161        | \$28,389        | \$37,478        | \$44,075        | 17.6%        | 102.1%             |
| International Visitor Spend | \$2,967         | \$2,880         | \$520           | \$539           | \$1,276         | 136.6%       | 44.3%              |
| Non-visitor PCE             | \$285           | \$299           | \$193           | \$225           | \$252           | 11.9%        | 84.2%              |
| Governmental Support        | \$254           | \$267           | \$147           | \$225           | \$294           | 30.6%        | 110.1%             |
| Capital Investment          | \$2,376         | \$2,366         | \$1,710         | \$1,808         | \$1,965         | 8.7%         | 83.1%              |

Sources: Oxford Economics, Longwoods International, Tourism Economics

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

### Pennsylvania travel- and tourism-related demand shares



Sources: Longwoods International, Tourism Economics



## DOMESTIC TRAVEL MARKET

Consumer survey information available for domestic (U.S.) travelers allows for a deeper analysis of domestic travel. The information presented in this section provides estimates of the size of certain domestic travel-related sectors along with the distribution of spending. Limited to domestic travelers that identified a Pennsylvania destination as at least part of their trip, this information, by definition, differs from the data presented in other sections of this report, and excludes international spending and certain spending categories not included in the consumer surveys (e.g., air travel).

### DOMESTIC TRAVEL SECTORS

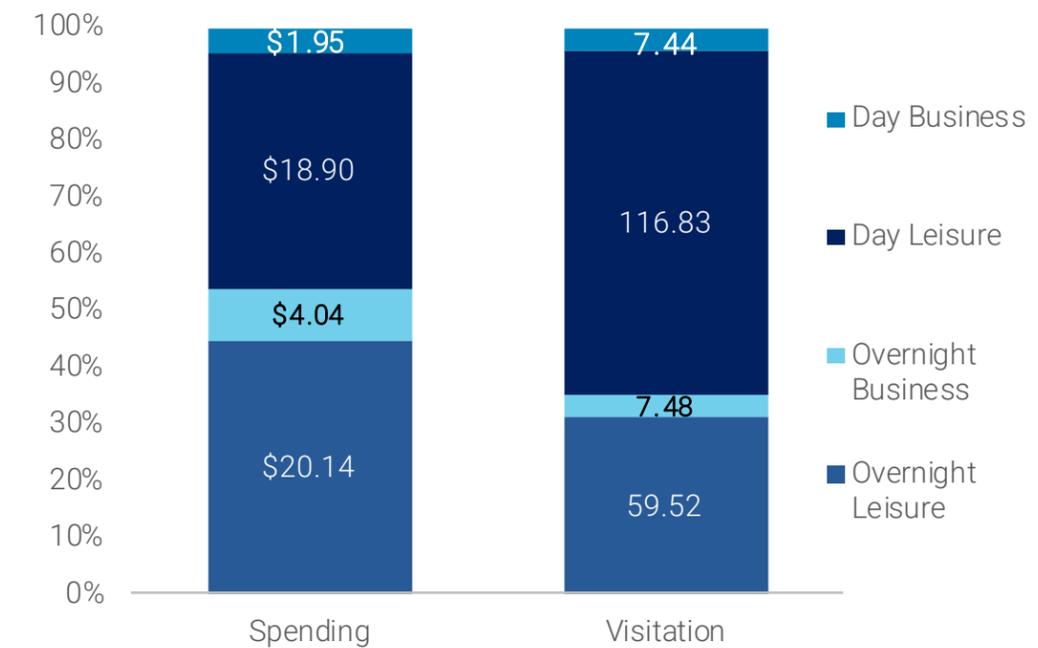
Pennsylvania hosted an estimated 191 million domestic travelers in 2022. As in prior years, the overnight leisure segment accounted for the largest amount of visitor spending in 2022, while day-trip leisure travelers accounted for largest number of travelers. The overnight leisure segment accounted for 31% of the total number of domestic travelers in 2022, but for a significantly higher 45% of all domestic visitor spending.

Survey data indicate that domestic travelers spent an estimated \$45 billion in Pennsylvania in 2022, a \$9.3 billion increase from 2021. The combined spending by overnight business and leisure travelers totaled an estimated \$24.2 billion, accounting for close to 55% of total domestic traveler spend. The increase in the number of overnight travelers helped overnight traveler spending outpace that of the day-trip segment, with overnight visitor spending up 30% in 2022 compared to the 22% increase in day-trip visitor spending.

Overnight leisure traveler spending grew \$3.4 billion to \$20 billion in 2022, accounting for 45% of total domestic traveler spending and 36% of 2022's increase. The recovery of business travel helped drive the growth in domestic travel spending in 2022. Overnight business spending more than doubled, reaching \$4 billion to surpass pre-pandemic levels.

### Pennsylvania domestic visitor volume and spending

Spending in \$ billions, visitation in millions



Sources: Longwoods International, Tourism Economics

### Pennsylvania domestic visitor spending

Amounts in \$ billions



Sources: Longwoods International, Tourism Economics

## DOMESTIC OVERNIGHT LEISURE SEGMENT

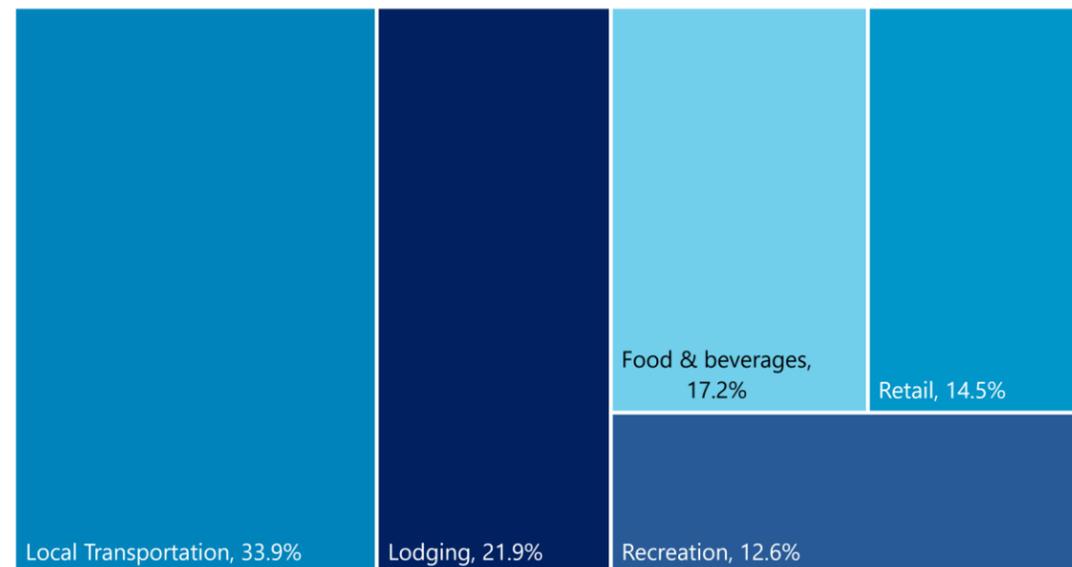
Spending by the 59.5 million domestic overnight leisure travelers (as measured in person-trips) who traveled to and/or within Pennsylvania in 2022 totaled an estimated \$20.1 billion, an increase of \$3.4 billion from 2021.

Overnight leisure travelers spent, on average, \$338 on each trip with per-trip spending increasing by \$35 in 2022.

Transportation at 34% accounted for the largest share of domestic overnight leisure traveler spending in 2022, followed by lodging (22%), and food and beverages (17%) with retail purchases and recreation accounting for 14% and 13%, respectively, of the traveler spend.

### Domestic overnight leisure traveler spending, 2022

By category, share of total domestic overnight leisure traveler spend



Sources: Longwoods International, Tourism Economics

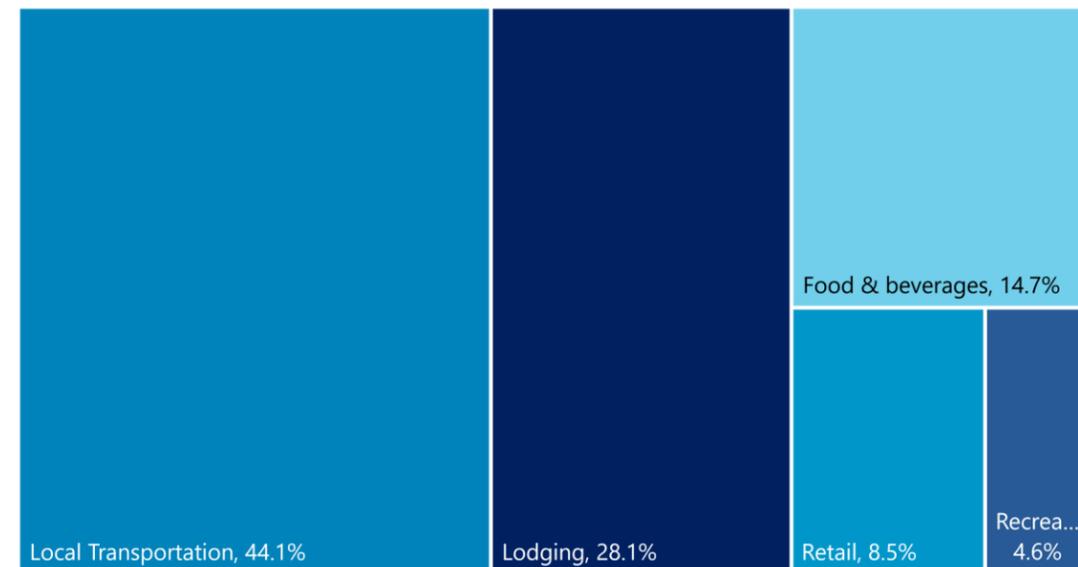
## DOMESTIC OVERNIGHT BUSINESS SEGMENT

Pennsylvania hosted an estimated 7.5 million overnight business travelers (as measured in person-trips) in 2022, an increase of 3 million from the prior year. With the return of city-oriented business meetings and convention travel, domestic overnight business travel surpassed its pre-pandemic level by 10%.

Consequent with the increase in the number of domestic overnight business travelers in 2022, the segment's spending level more than doubled that of the prior year. With a 120% increase from 2021, domestic overnight business spending surpassed \$4 billion in 2022. The per person spending of this travel segment rose to \$540 per-trip due in part to the price increases in lodging and transportation.

### Domestic overnight business traveler spending, 2022

By category, share of total domestic business traveler spend



Sources: Longwoods International, Tourism Economics

## DOMESTIC DAY-TRIP LEISURE SEGMENT

Pennsylvania hosted an estimated 116.8 million domestic day-trip leisure travelers (as measured in person-trips) in 2022, an increase of 3.3 million visitors from 2021. These travelers to and/or within Pennsylvania spent an estimated \$18.9 billion, a 21% increase from the prior year.

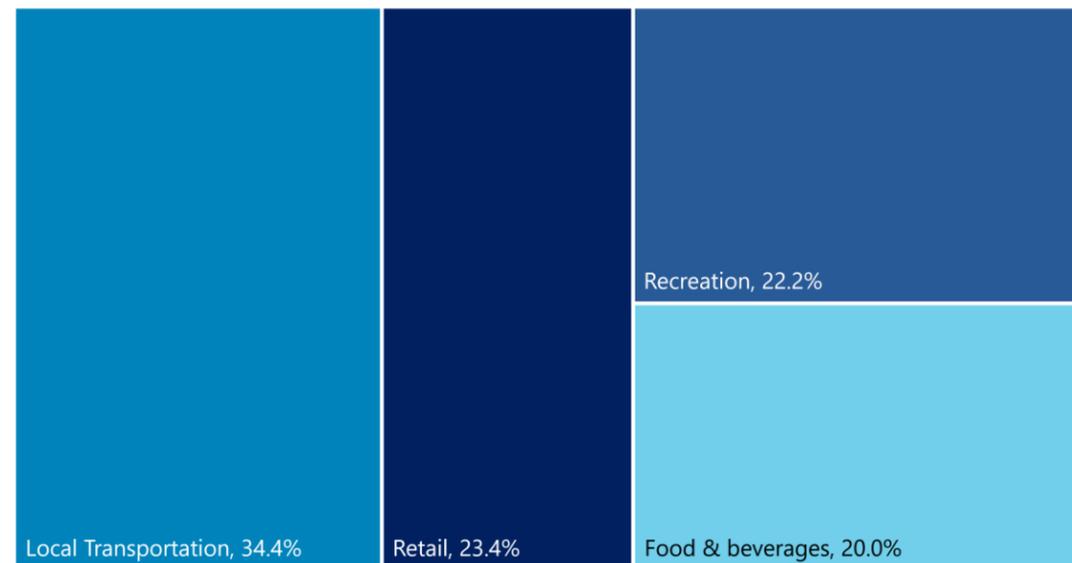
As in prior years and in the same manner as the other travel segments, spending on transportation costs by domestic day-trip leisure visitors accounted for the largest share of the segment's total spending at 34.4% in 2022, supported by increases in gasoline prices.

Each domestic day-trip leisure traveler spent an average of \$162 per trip in 2022, a \$24 increase from 2021.

Day-trip leisure travelers spent a far higher share of their travel budget on recreation than the overnight leisure segment in 2022.

### Domestic day-trip leisure traveler spend, 2022

By category, share of total domestic day-trip leisure traveler spend



Sources: Longwoods International, Tourism Economics

## TOTAL DOMESTIC DAY-TRIP TRAVEL SEGMENT

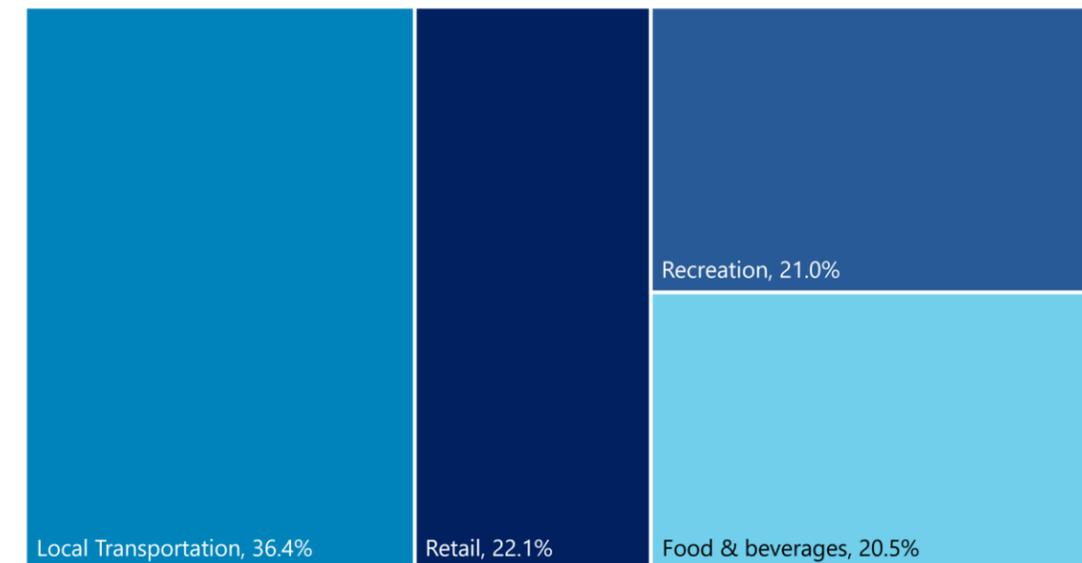
The total combined number of day-trips leisure and business travelers took to and/or within Pennsylvania rose 3.6% to an estimated 124 million (as measured in person-trips) in 2022. Those travelers spent an estimated \$20.8 billion, an increase of \$3.7 billion from 2021.

Each day-trip traveler spent an average of \$168 per trip, up from \$143 in 2021 to surpass the segment's pre-pandemic spending level, with spending by business travelers generally somewhat higher than that of the day-trip leisure segment.

Without having to spend money on lodging, the share of the day-trip traveler dollar going towards recreation, retail, and food and beverages typically exceeded that of the other travel segments.

### Domestic day-trip traveler spend, 2022

By category, share of total domestic day-trip leisure traveler spend



Sources: Longwoods International, Tourism Economics

## DOMESTIC SPENDING CATEGORIES

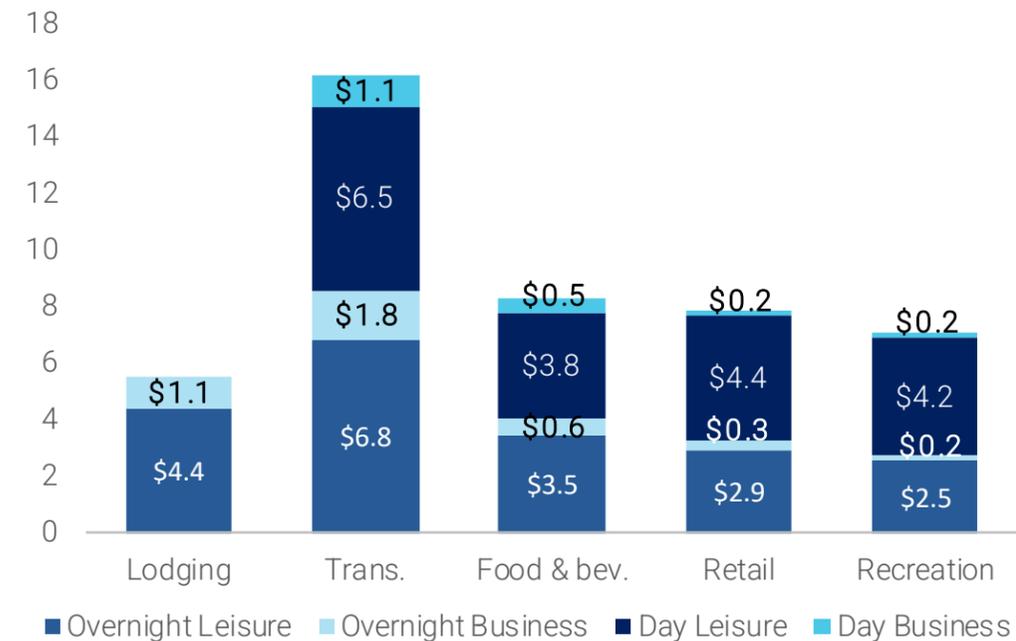
Focusing on domestic travel segments provides insight into the shift in travel as the overnight travel segment rebounded and business travel increased from the pandemic-induced losses to drive overall spending results.

The overall business share of domestic visitor spending rose to 13% in 2022, compared to 9% in 2021. The business segment's share of food & beverage spending grew to 13% in 2022 with an estimated \$1.1 billion of the \$8.3 billion combined total from all travel segments spent at restaurants, bars, and grocery stores.

Spending on recreation by travelers to and/or within Pennsylvania in 2022 once again was dominated by day-trip leisure travelers with the segment accounting for 59% of all visitor-related recreational spending in 2022.

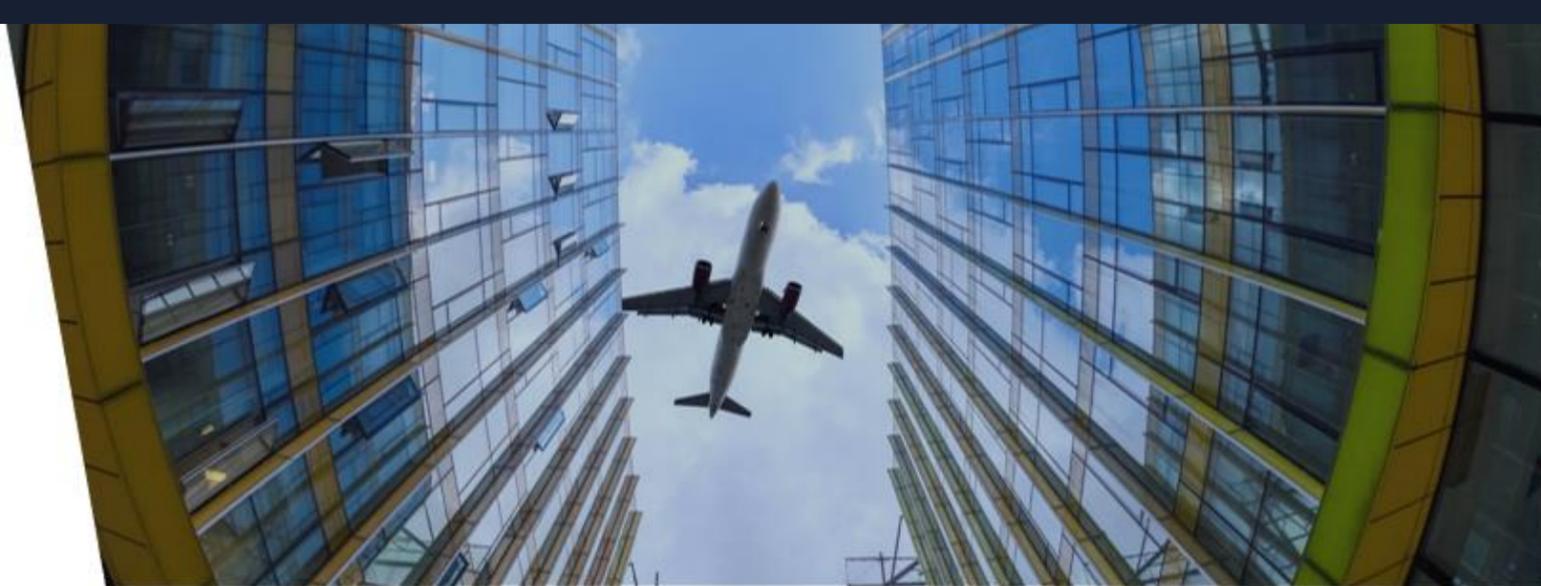
## Pennsylvania domestic traveler spending, 2022

By category, in \$ billions



Sources: Longwoods International, Tourism Economics





## ECONOMIC IMPACT FRAMEWORK

### ECONOMIC IMPACT METHODOLOGY

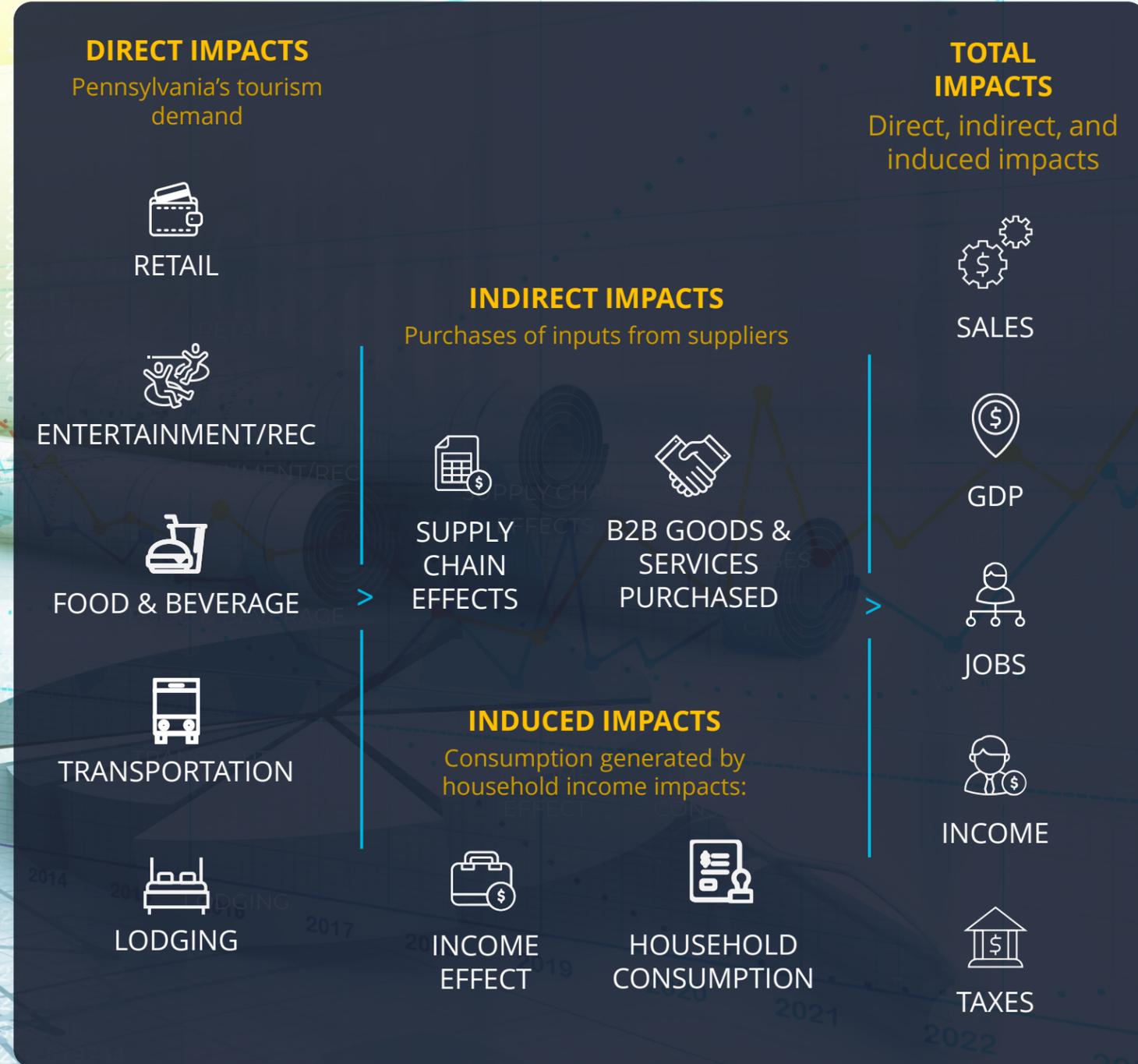
The analysis of the Pennsylvania travel and tourism economy begins with direct visitor spending and then analyzes the downstream effects of this spending on the broader economy. To determine the industry's total economic impact, direct spending was input into a model of the Pennsylvania economy, constructed using an IMPLAN input-output (I-O) model. The model traces the full extent of industry impacts as dollars flow through the local economy.

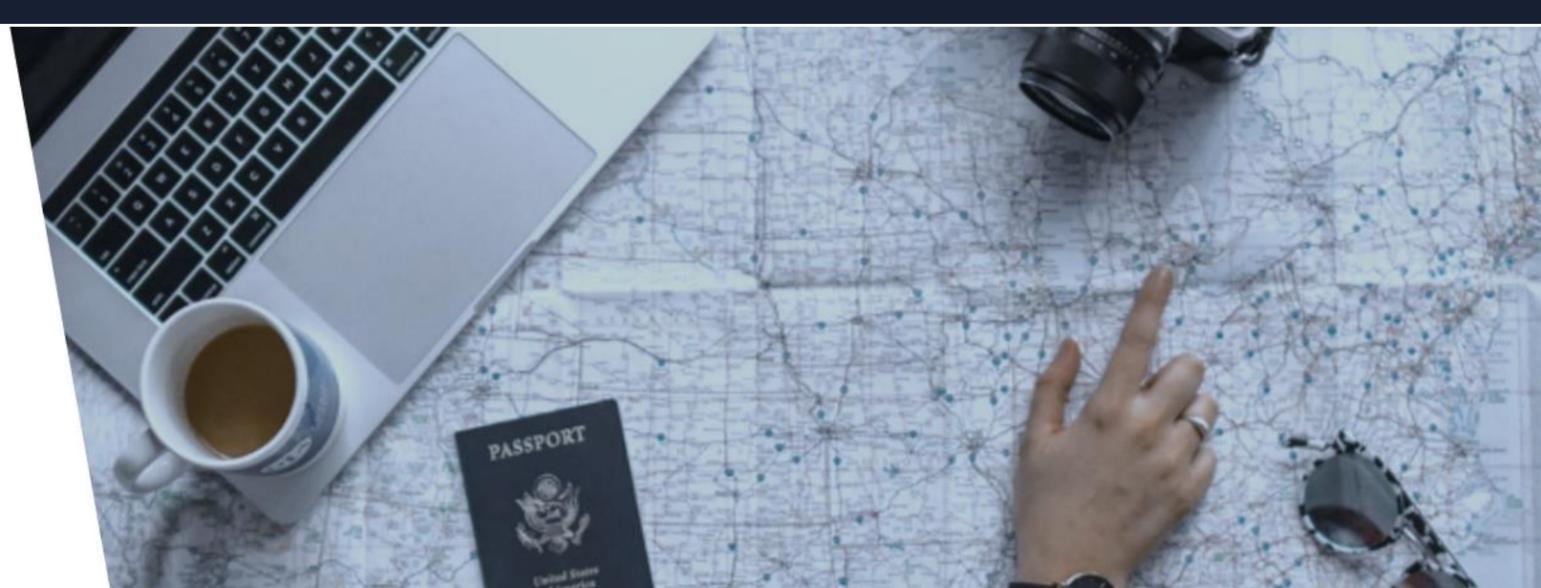
An I-O model represents a profile of an economy by measuring the relationships among industries and consumers and quantifies three levels of impact:

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

The Tourism Economics model calculates these three levels of impact - direct, indirect and induced - for a broad set of indicators, including:

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





## ECONOMIC IMPACT FINDINGS

### DIRECT IMPACTS

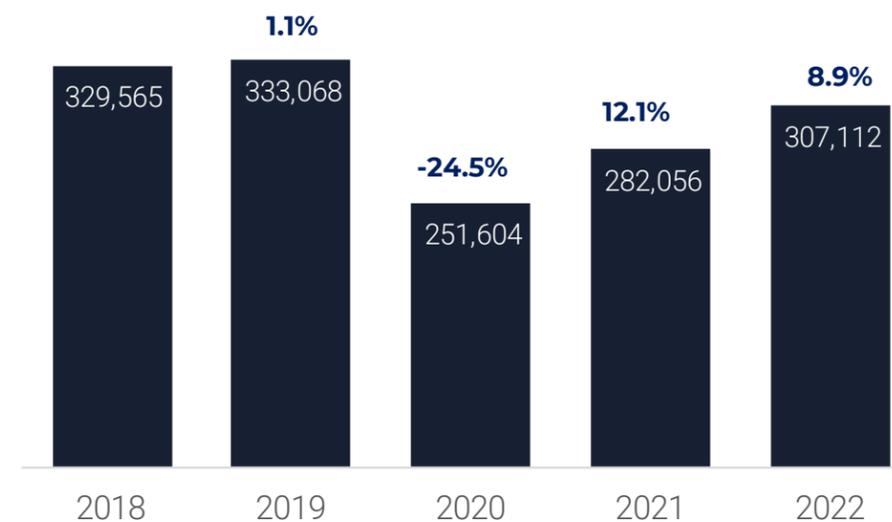
Traveler spending directly supported more than 307,100 jobs in Pennsylvania in 2022, an 8.9% increase from the prior year, or more than 25,000 additional jobs directly supported by travel and tourism compared to 2021. Despite the strong increase, the number of jobs directly supported by travel and tourism remained 26,000 jobs below the pre-pandemic level.

The percentage increase in jobs directly supported by traveler spending was 10 percentage points below the 19% increase in traveler spending due to both labor market constraints and business's hesitation to add jobs in a still uncertain economy in 2022.

The travel and tourism "industry" does not have an official government industrial classification, but instead draws from several industries (e.g., accommodation, food and beverages, transportation, etc.) each with its own distinct NAICS code. Nevertheless, as an industry, travel and tourism's direct contribution to Pennsylvania's employee count ranked 13th in comparison to all other sectors in 2022, just behind education and down from 11th in 2019.

### Visitor supported employment in Pennsylvania

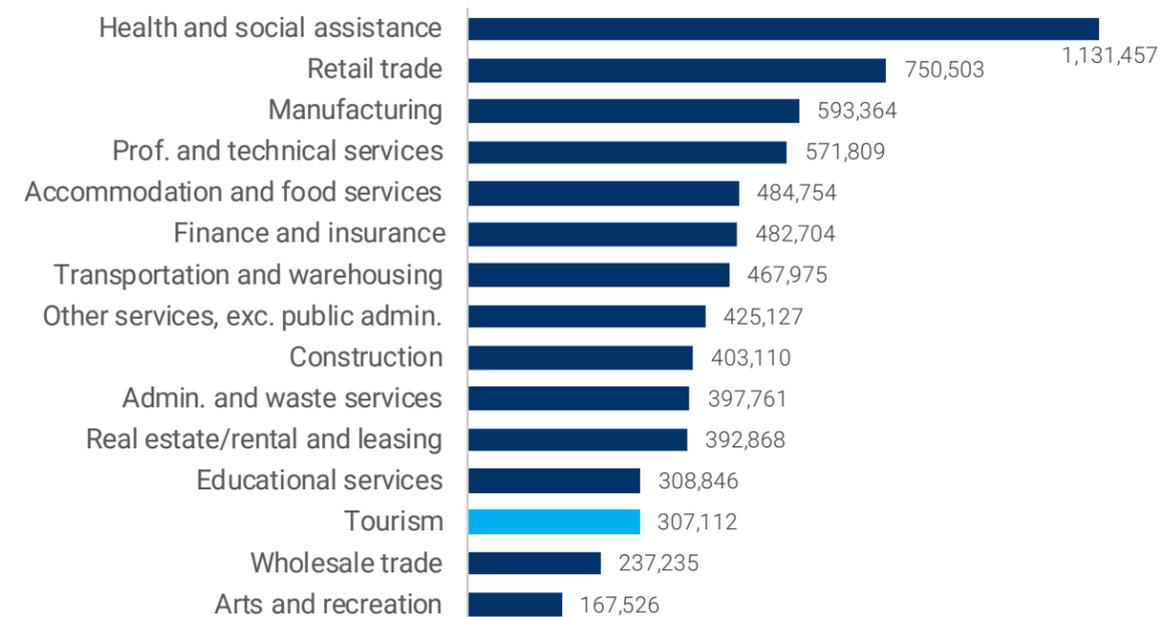
Amounts in number of jobs



Source: Tourism Economics

### Employment in Pennsylvania, by major industry

Amounts in number of jobs



Source: Tourism Economics



# ECONOMIC IMPACT FINDINGS

## BUSINESS SALES IMPACTS

The total impact from Pa travelers and tourists was an estimated \$76.6 billion in business sales in 2022 - a total that includes the direct, indirect, and induced impacts. The direct impact of \$47.9 billion, or 63% of the total impact, was derived from \$45.4 billion in visitor spending combined with \$2.5 billion in investment and government support of tourism. Adding in the \$13.5 billion in indirect impacts and \$15.2 billion in induced impacts, the total economic impact of travelers in terms of business sales reached \$76.6 billion.

Visitor spending creates business activity across the economic spectrum. Significant benefits accrue in sectors including finance, insurance, and real estate and business services. Companies that directly interact with visitors spent \$3.4 billion on business services such as advertising, building services, and lawyers to support their visitor business interactions.

### Summary economic impacts (2022)

Amounts in \$ billions



Source: Tourism Economics

### Travel- and tourism-related business sales impacts by industry (2022)

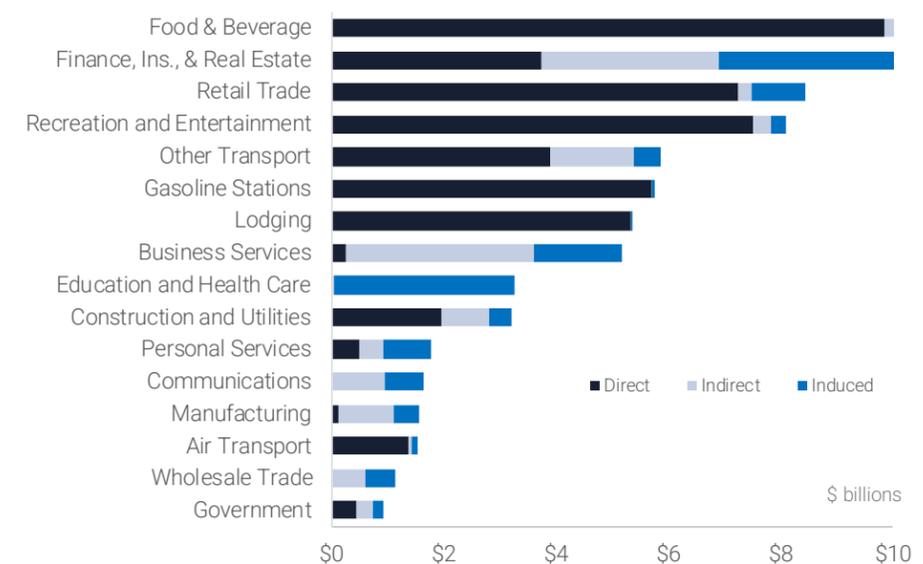
Amounts in \$ millions

|                              | Direct Business Sales | Indirect Business Sales | Induced Business Sales | Total Business Sales |
|------------------------------|-----------------------|-------------------------|------------------------|----------------------|
| <b>Total, all industries</b> | <b>\$47,862</b>       | <b>\$13,481</b>         | <b>\$15,228</b>        | <b>\$76,571</b>      |
| Food & Beverage              | \$ 9,839              | \$397                   | \$1,072                | \$11,309             |
| Finance, Ins., & Real Estate | \$ 3,740              | \$3,153                 | \$4,258                | \$11,152             |
| Retail Trade                 | \$ 7,250              | \$245                   | \$948                  | \$8,443              |
| Recreation and Entertainment | \$ 7,510              | \$308                   | \$286                  | \$8,104              |
| Other Transport              | \$ 3,900              | \$1,492                 | \$463                  | \$5,855              |
| Gasoline Stations            | \$ 5,689              | \$23                    | \$52                   | \$5,763              |
| Lodging                      | \$ 5,325              | \$8                     | \$12                   | \$5,345              |
| Business Services            | \$ 248                | \$3,362                 | \$1,552                | \$5,161              |
| Education and Health Care    | -                     | \$38                    | \$3,212                | \$3,250              |
| Construction and Utilities   | \$ 1,965              | \$834                   | \$413                  | \$3,212              |
| Personal Services            | \$ 495                | \$409                   | \$874                  | \$1,778              |
| Communications               | -                     | \$946                   | \$688                  | \$1,634              |
| Manufacturing                | \$ 106                | \$997                   | \$459                  | \$1,562              |
| Air Transport                | \$ 1,361              | \$72                    | \$90                   | \$1,523              |
| Wholesale Trade              | -                     | \$611                   | \$530                  | \$1,141              |
| Government                   | \$ 434                | \$286                   | \$204                  | \$923                |
| Agriculture, Fishing, Mining | -                     | \$301                   | \$114                  | \$415                |

Source: Tourism Economics

### Travel- and tourism-related business sales impacts by industry (2022)

Amounts in \$ billions



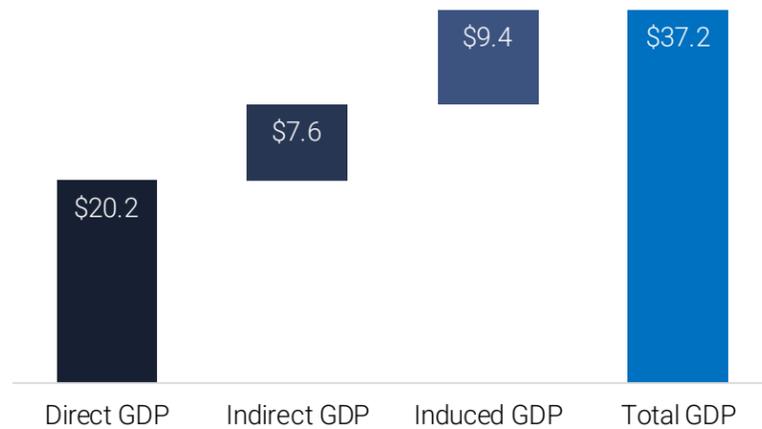
Source: Tourism Economics

## VALUE ADDED IMPACTS

Pennsylvania's travel and tourism industry directly contribute \$20.2 billion to the state's gross domestic product, or GDP. The value of all traveler-supported goods and services produced in Pennsylvania in 2022 was \$37.2 billion, or 4.8% of Pennsylvania's total GDP.

### Travel industry value-added GDP impacts (2022)

Amounts in \$ billions



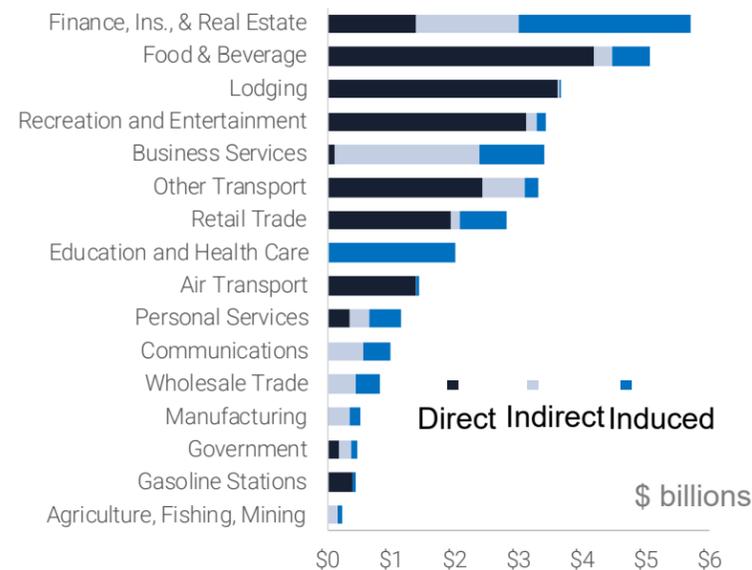
Source: Tourism Economics

The total contribution of the finance & real estate industry to Pa's GDP derived from the travel industry was an estimated \$5.7 billion in 2022.

The induced contribution from the education and health care industries as the result of travel demand was \$2.0 billion in Pa GDP, demonstrating the impact of travel and tourism activity on businesses across the industrial spectrum.

### Travel value-added GDP impact by Industry (2022)

Amounts in \$ billions



Source: Tourism Economics



### Travel industry value-added GDP impacts by industry (2022)

Amounts in \$ millions

|                              | Direct GDP       | Indirect GDP    | Induced GDP     | Total GDP        |
|------------------------------|------------------|-----------------|-----------------|------------------|
| <b>Total, all industries</b> | <b>\$ 20,161</b> | <b>\$ 7,616</b> | <b>\$ 9,419</b> | <b>\$ 37,196</b> |
| Finance, Ins., & Real Estate | \$ 1,388         | \$ 1,607        | \$ 2,718        | \$ 5,714         |
| Food & Beverage              | \$ 4,200         | \$ 276          | \$ 585          | \$ 5,061         |
| Lodging                      | \$ 3,630         | \$ 6            | \$ 8            | \$ 3,643         |
| Recreation and Entertainment | \$ 3,135         | \$ 155          | \$ 152          | \$ 3,441         |
| Business Services            | \$ 104           | \$ 2,292        | \$ 1,022        | \$ 3,417         |
| Other Transport              | \$ 2,425         | \$ 665          | \$ 222          | \$ 3,312         |
| Retail Trade                 | \$ 1,940         | \$ 138          | \$ 749          | \$ 2,827         |
| Education and Health Care    | -                | \$ 23           | \$ 1,976        | \$ 2,000         |
| Construction and Utilities   | \$ 1,021         | \$ 452          | \$ 226          | \$ 1,699         |
| Air Transport                | \$ 1,380         | \$ 20           | \$ 49           | \$ 1,449         |
| Personal Services            | \$ 347           | \$ 302          | \$ 506          | \$ 1,155         |
| Communications               | -                | \$ 551          | \$ 431          | \$ 981           |
| Wholesale Trade              | -                | \$ 432          | \$ 401          | \$ 833           |
| Manufacturing                | \$ 24            | \$ 324          | \$ 171          | \$ 519           |
| Government                   | \$ 174           | \$ 203          | \$ 99           | \$ 476           |
| Gasoline Stations            | \$ 394           | \$ 12           | \$ 43           | \$ 449           |
| Agriculture, Fishing, Mining | -                | \$ 160          | \$ 61           | \$ 221           |

Source: Tourism Economics

# EMPLOYMENT IMPACTS

Travel and tourism directly supported an estimated 322,000 jobs in Pennsylvania in 2022, and an additional 165,000 jobs through the indirect and induced impacts for a total employment impact of 486,900. This equates to 1-in-16 Pennsylvania jobs.

## Summary of travel and tourism employment impacts (2022)

Amounts in number of jobs

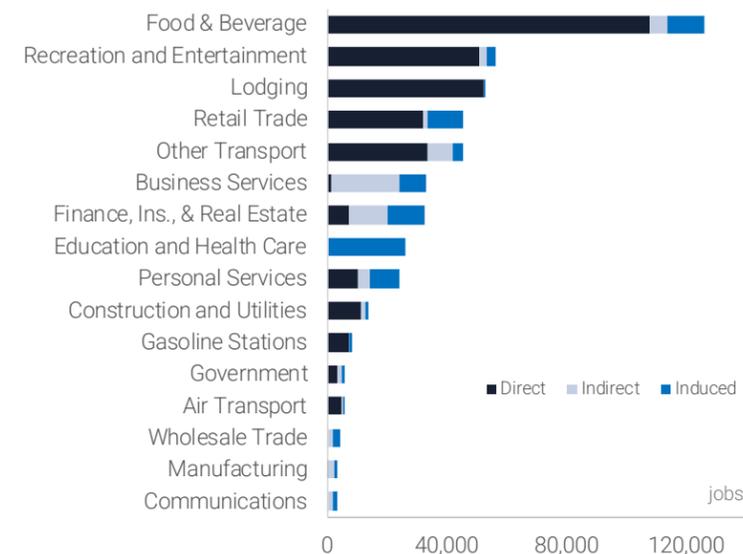


Source: Tourism Economics

With travel and tourism a labor-intensive industry, much of the employment impact is derived directly from traveler activity. As such, the food & beverage, recreation & entertainment, and lodging were the top three industries in terms of the number of jobs supported by travel and tourism, both directly and in total in 2022.

## Travel job Impacts by industry (2022)

Amounts in number of jobs



Source: Tourism Economics



## Summary of travel and tourism employment Impacts by industry (2022)

Amounts in number of jobs

|                              | Direct Jobs    | Indirect Jobs | Induced Jobs  | Total Jobs     |
|------------------------------|----------------|---------------|---------------|----------------|
| <b>Total, all industries</b> | <b>321,974</b> | <b>68,653</b> | <b>96,244</b> | <b>486,871</b> |
| Food & Beverage              | 107,642        | 5,955         | 12,752        | 126,348        |
| Recreation and Entertainment | 50,661         | 2,777         | 2,847         | 56,285         |
| Lodging                      | 52,225         | 61            | 106           | 52,392         |
| Retail Trade                 | 31,906         | 1,763         | 11,751        | 45,421         |
| Other Transport              | 33,480         | 8,286         | 3,524         | 45,290         |
| Business Services            | 1,257          | 22,750        | 9,274         | 33,282         |
| Finance, Ins., & Real Estate | 7,400          | 12,555        | 12,382        | 32,337         |
| Education and Health Care    | -              | 432           | 25,515        | 25,946         |
| Personal Services            | 10,240         | 3,895         | 10,001        | 24,136         |
| Construction and Utilities   | 11,360         | 1,522         | 991           | 13,872         |
| Gasoline Stations            | 7,293          | 173           | 688           | 8,154          |
| Government                   | 3,231          | 1,653         | 1,059         | 5,943          |
| Air Transport                | 5,008          | 102           | 175           | 5,285          |
| Wholesale Trade              | -              | 1,995         | 2,074         | 4,069          |
| Manufacturing                | 271            | 2,058         | 1,188         | 3,517          |
| Communications               | -              | 2,037         | 1,417         | 3,453          |
| Agriculture, Fishing, Mining | -              | 640           | 501           | 1,140          |

Source: Tourism Economics

# LABOR INCOME IMPACTS

Travel and tourism generated \$13.6 billion in direct labor income and \$23.8 billion in total when indirect and induced impacts are included. The total amount of travel- and tourism-generated income in Pennsylvania in 2022 rose 11% from 2021, or an additional \$2.3 billion in income for Pennsylvania households.

## Summary labor income impacts (2022)

Amounts in \$ billions

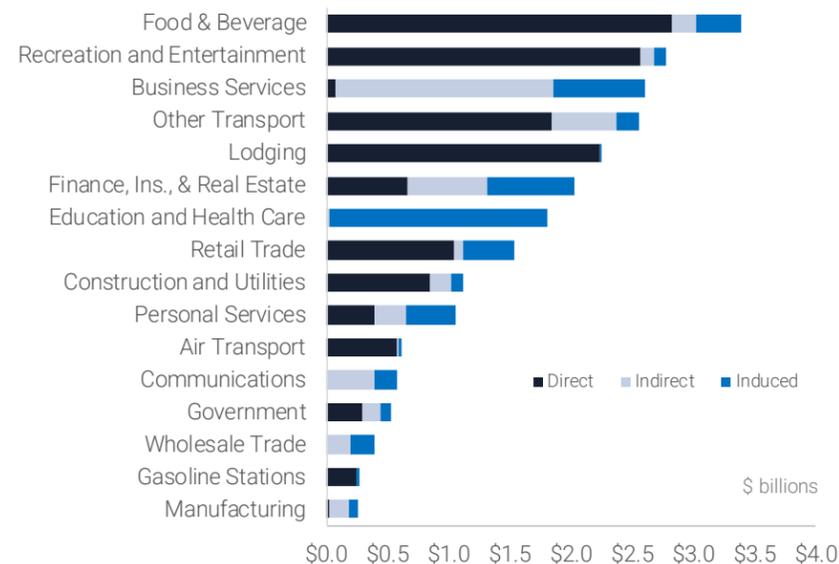


Source: Tourism Economics

Much of the labor income paid to workers in the business services industry that was supported by travel and tourism was derived from indirect (\$1.8 billion) and induced impacts (\$745 million), showing the value of non-direct impacts to Pennsylvanians whose jobs are in some way positively impacted by travel and tourism.

## Travel labor income Impacts by industry (2022)

Amounts in \$ billions



Source: Tourism Economics



## Summary labor income impacts (2022)

Amounts in \$ millions

|                              | Direct Labor Income | Indirect Labor Income | Induced Labor Income | Total Labor Income |
|------------------------------|---------------------|-----------------------|----------------------|--------------------|
| <b>Total, all industries</b> | <b>\$13,608</b>     | <b>\$4,752</b>        | <b>\$5,442</b>       | <b>\$23,802</b>    |
| Food & Beverage              | \$ 2,821            | \$201                 | \$375                | \$3,398            |
| Recreation and Entertainment | \$ 2,564            | \$116                 | \$98                 | \$2,778            |
| Business Services            | \$ 67               | \$1,791               | \$745                | \$2,603            |
| Other Transport              | \$ 1,850            | \$519                 | \$190                | \$2,559            |
| Lodging                      | \$ 2,231            | \$2                   | \$5                  | \$2,238            |
| Finance, Ins., & Real Estate | \$ 665              | \$649                 | \$717                | \$2,031            |
| Education and Health Care    | -                   | \$22                  | \$1,780              | \$1,802            |
| Retail Trade                 | \$ 1,041            | \$74                  | \$426                | \$1,541            |
| Construction and Utilities   | \$ 844              | \$175                 | \$94                 | \$1,113            |
| Personal Services            | \$ 389              | \$255                 | \$409                | \$1,053            |
| Air Transport                | \$ 581              | \$12                  | \$20                 | \$613              |
| Communications               | -                   | \$388                 | \$187                | \$575              |
| Government                   | \$ 291              | \$154                 | \$82                 | \$527              |
| Wholesale Trade              | -                   | \$194                 | \$193                | \$387              |
| Gasoline Stations            | \$ 243              | \$6                   | \$25                 | \$274              |
| Manufacturing                | \$ 21               | \$160                 | \$80                 | \$261              |
| Agriculture, Fishing, Mining | -                   | \$33                  | \$17                 | \$51               |

Source: Tourism Economics

## ECONOMIC IMPACT FINDINGS

### FISCAL (TAX) IMPACTS

Visitor spending, travel- and tourism-supported jobs, labor income, and business sales together generated \$9.6 billion in government tax revenues in 2022.

Pennsylvania's state and local governments together realized an estimated \$4.7 billion in tax revenues in 2022, a \$460 million or 11% increase from 2021, but remaining \$160 million, or 3 percent below its pre-pandemic level.

Each household in Pennsylvania would need to be taxed an additional \$880 to replace the state and local tax revenues generated by travel and tourism activity in Pennsylvania in 2022.

#### Fiscal (tax) impacts

Amounts in \$ millions

|                              | 2018             | 2019              | 2020             | 2021             | 2022             | 2022 Growth  |
|------------------------------|------------------|-------------------|------------------|------------------|------------------|--------------|
| <b>Total Tax Revenues</b>    | <b>\$9,657.5</b> | <b>\$10,046.1</b> | <b>\$7,649.9</b> | <b>\$8,808.5</b> | <b>\$9,623.1</b> | <b>9.2%</b>  |
| <b>Federal Taxes</b>         | <b>\$5,012.9</b> | <b>\$5,235.4</b>  | <b>\$4,070.5</b> | <b>\$4,615.0</b> | <b>\$4,972.1</b> | <b>7.7%</b>  |
| Personal Income              | \$1,539.5        | \$1,608.0         | \$1,278.3        | \$1,533.1        | \$1,705.5        | 11.2%        |
| Corporate                    | \$548.6          | \$572.7           | \$397.8          | \$398.9          | \$416.9          | 4.5%         |
| Indirect Business            | \$421.5          | \$440.0           | \$341.0          | \$370.9          | \$423.4          | 14.1%        |
| Social Insurance             | \$2,503.2        | \$2,614.6         | \$2,053.4        | \$2,312.0        | \$2,426.2        | 4.9%         |
| <b>State and Local Taxes</b> | <b>\$4,644.7</b> | <b>\$4,810.7</b>  | <b>\$3,579.4</b> | <b>\$4,193.5</b> | <b>\$4,651.1</b> | <b>10.9%</b> |
| Sales                        | \$1,697.2        | \$1,742.6         | \$1,142.6        | \$1,501.7        | \$1,785.9        | 18.9%        |
| Room Tax                     | \$217.8          | \$228.6           | \$107.8          | \$179.0          | \$241.2          | 34.8%        |
| Personal Income              | \$481.1          | \$493.4           | \$411.3          | \$470.5          | \$515.2          | 9.5%         |
| Corporate                    | \$235.1          | \$246.0           | \$168.7          | \$171.4          | \$181.1          | 5.7%         |
| Social Insurance             | \$34.6           | \$36.1            | \$24.3           | \$23.6           | \$22.5           | -4.8%        |
| Excise and Fees              | \$554.8          | \$579.2           | \$414.3          | \$422.2          | \$447.3          | 5.9%         |
| Property                     | \$1,424.1        | \$1,484.8         | \$1,310.5        | \$1,425.1        | \$1,457.9        | 2.3%         |

Source: Tourism Economics

Travel- and tourism-supported revenues to Pennsylvania's state government rose to \$2.5 billion in 2022. The majority of state revenues were from sales taxes with income, corporate, and excise tax revenues and fees from visitor activity together adding \$800 million to state coffers. State revenues grew by \$315 million with sales tax growth driving the increase in 2022.

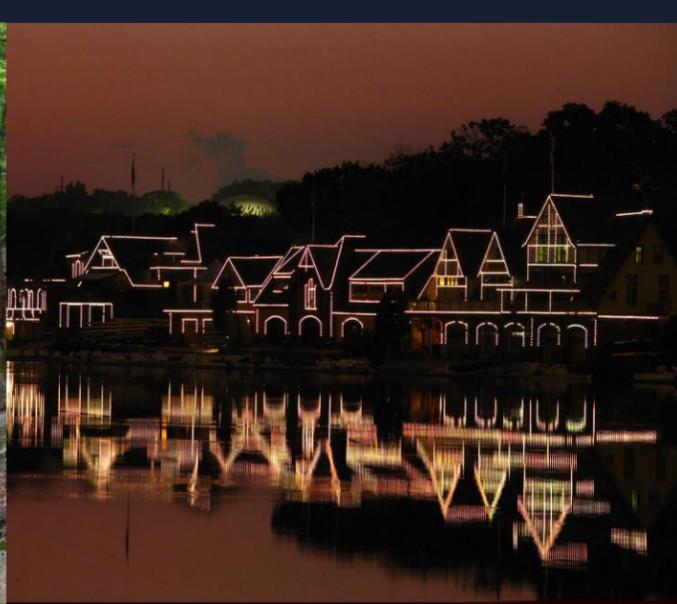
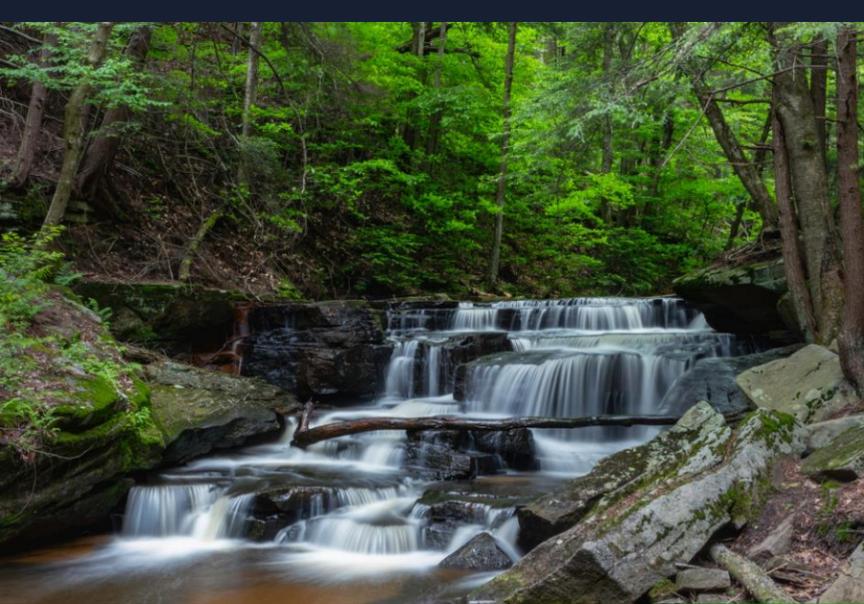
Local tax revenues from traveler-related activity rose to \$2.2 billion in 2022 with property taxes, room taxes, fees, and income taxes supporting Pennsylvania's local governments. Local tax revenues grew by \$140 million, supported in part by a \$60 million increase in room tax revenues.

#### Fiscal (tax) impacts

Amounts in \$ millions

|                    | 2019             | 2020             | 2021             | 2022             |
|--------------------|------------------|------------------|------------------|------------------|
| <b>State Taxes</b> | <b>\$2,567.2</b> | <b>\$1,793.1</b> | <b>\$2,153.8</b> | <b>\$2,469.5</b> |
| Sales              | \$1,617.2        | \$1,066.8        | \$1,378.0        | \$1,638.7        |
| Bed Tax            | \$0.0            | \$0.0            | \$0.0            | \$0.0            |
| Personal Income    | \$351.4          | \$292.9          | \$336.2          | \$368.1          |
| Corporate          | \$246.0          | \$168.7          | \$171.4          | \$181.1          |
| Social Insurance   | \$36.1           | \$24.3           | \$23.6           | \$22.5           |
| Excise and Fees    | \$313.2          | \$237.4          | \$242.0          | \$256.4          |
| Property           | \$3.3            | \$2.9            | \$2.6            | \$2.7            |
| <b>Local Taxes</b> | <b>\$2,243.5</b> | <b>\$1,786.3</b> | <b>\$2,039.7</b> | <b>\$2,181.6</b> |
| Sales              | \$125.4          | \$75.8           | \$123.7          | \$147.1          |
| Bed Tax            | \$228.6          | \$107.8          | \$179.0          | \$241.2          |
| Personal Income    | \$142.0          | \$118.4          | \$134.3          | \$147.1          |
| Corporate          | \$0.0            | \$0.0            | \$0.0            | \$0.0            |
| Social Insurance   | \$0.0            | \$0.0            | \$0.0            | \$0.0            |
| Excise and Fees    | \$266.0          | \$176.8          | \$180.2          | \$190.9          |
| Property           | \$1,481.4        | \$1,307.6        | \$1,422.4        | \$1,455.2        |

Source: Tourism Economics



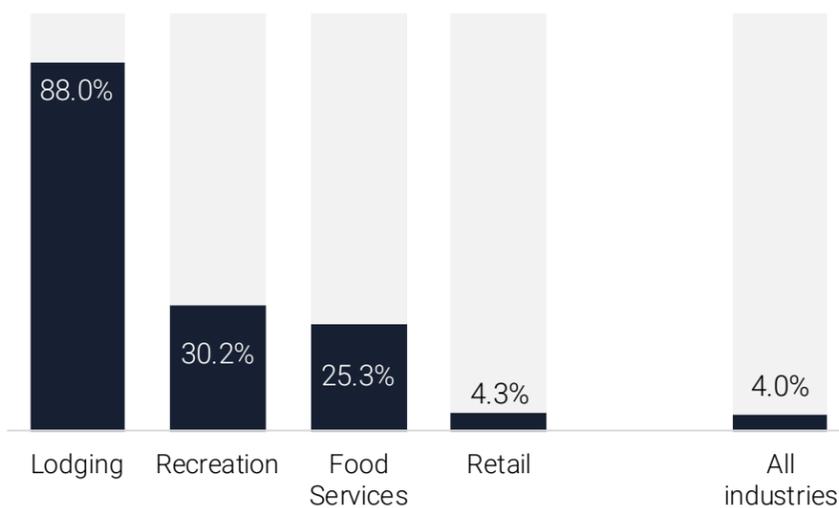
## ECONOMIC IMPACTS IN CONTEXT

Travel and tourism supports a significant share of employment in several industries with 88% of lodging employment related to travelers. Visitor activity employs 30% of jobs in recreational industries and 25% of all restaurant employment.

Overall, direct tourism jobs accounted for 4.0% of all jobs in Pennsylvania in 2022. As the travel recovery continues, the share of employment supported by travelers to and within Pennsylvania is expected to rise.

### Travel- and tourism-related employment intensity

Direct jobs, traveler-supported share of industry employment



Source: BEA, BLS, Tourism Economics

## ECONOMIC IMPACTS IN CONTEXT



### \$45.4B VISITOR SPENDING

Visitor spending in Pennsylvania was as large as the state budget (\$45.5 billion).



### \$7.5B VISITOR SPENDING INCREASE

The \$7.5 billion increase in visitor spending is larger than the TEN-year Capital Investment Plan of the PA Turnpike (\$7 billion).



### 486,871 JOBS

The number of jobs supported by traveler demand would be enough to employ the entire populations of Pittsburgh and Allentown—the 2<sup>nd</sup> and 3<sup>rd</sup> largest cities in the state—with enough left over for Bethlehem (12<sup>th</sup> largest).



### \$4.7B STATE & LOCAL TAXES

Each household in Pennsylvania would need to be taxed an additional \$880 to replace the visitor taxes received by the state and local governments in 2022 – more than enough to cover the average American's holiday spending (\$837).



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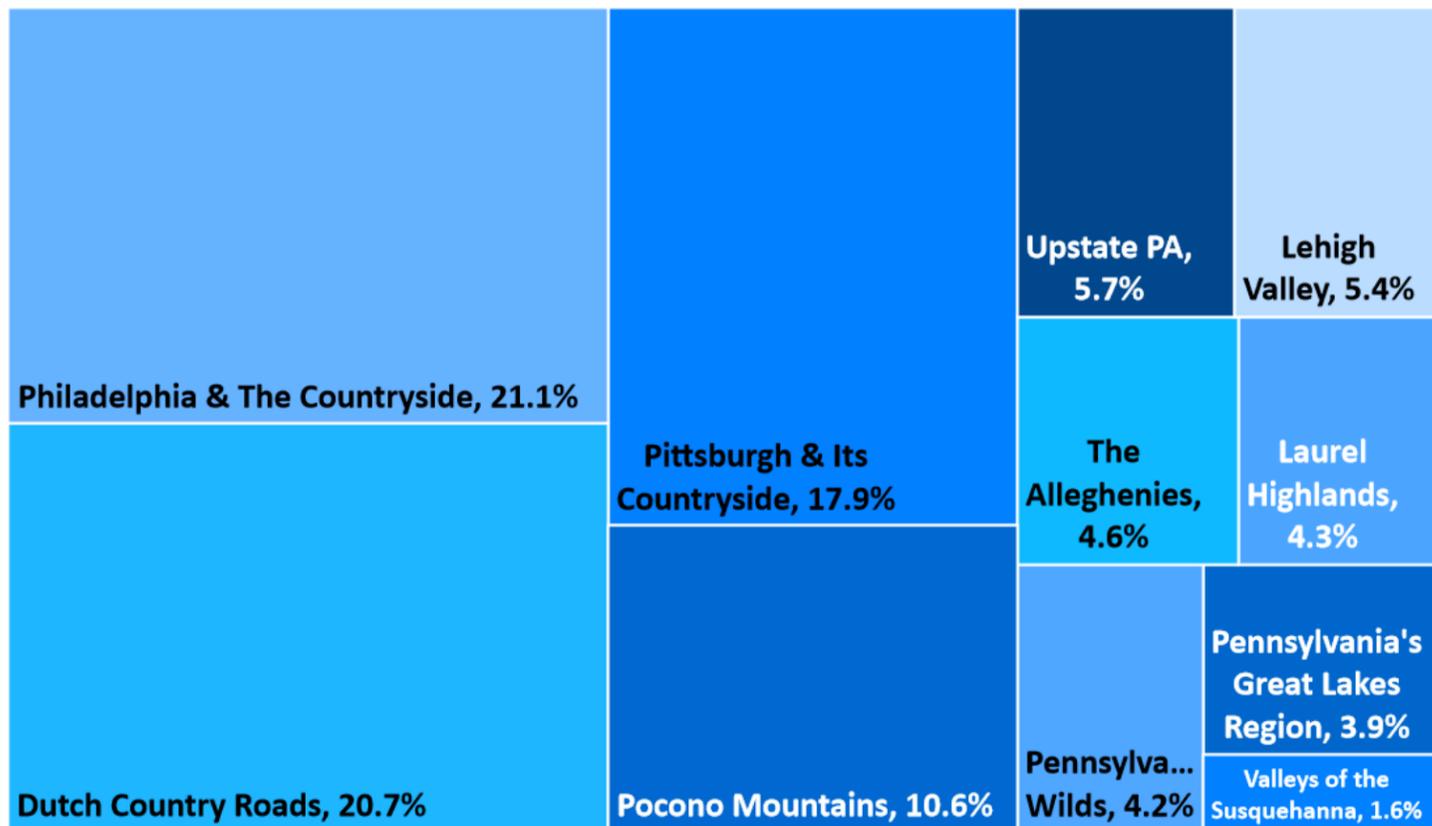
# County Analysis, 2022



# PA REGIONS - TRAVELER SPENDING, 2022

As travelers started feeling more confident in their ability to stay healthy while traveling in 2022, Pennsylvania's major urban areas, most notably Philadelphia and Pittsburgh, experienced an increase in travelers and traveler spending with their share of Pa's total visitor spending also increasing from 2021.

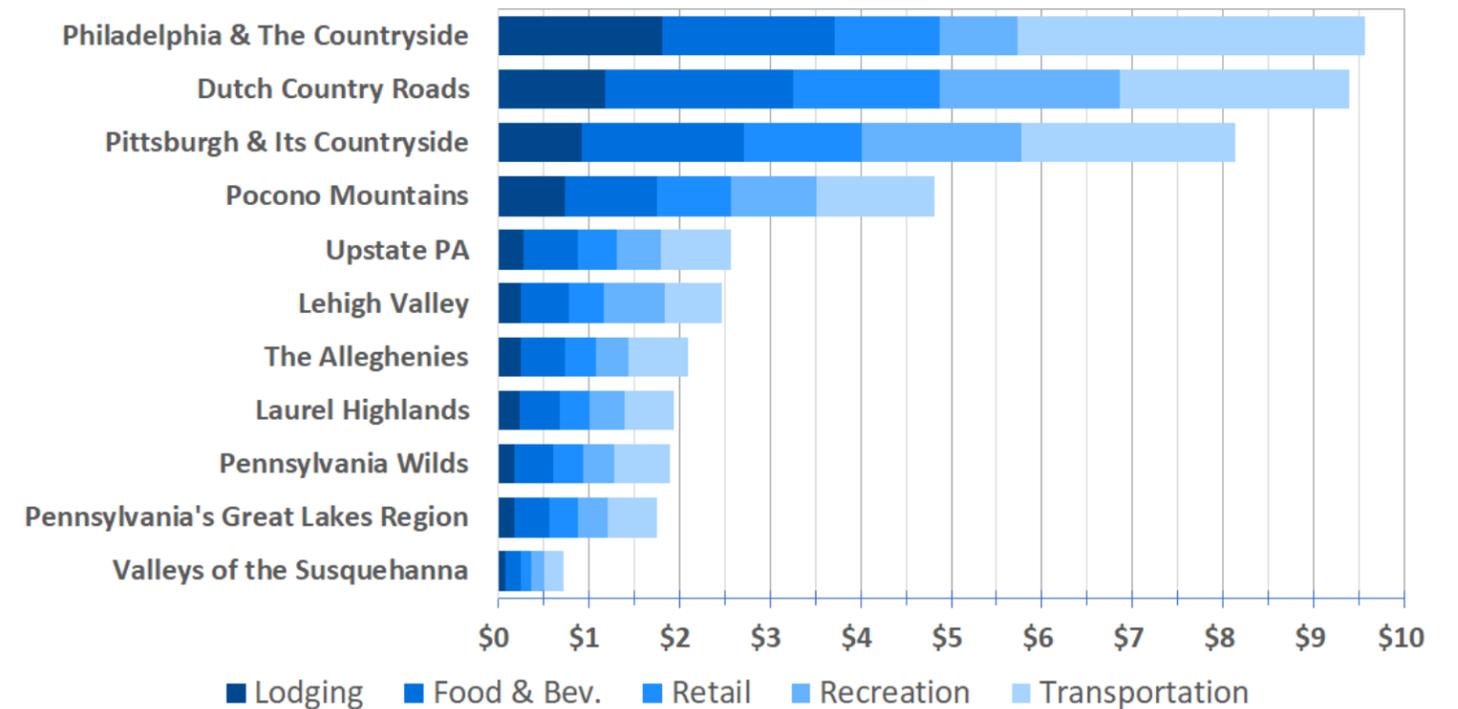
**Regional spending shares, 2022**  
Percent of state total visitor spending



Source: Tourism Economics

## Visitor Spending by Region, 2022

By spending category, in \$billions

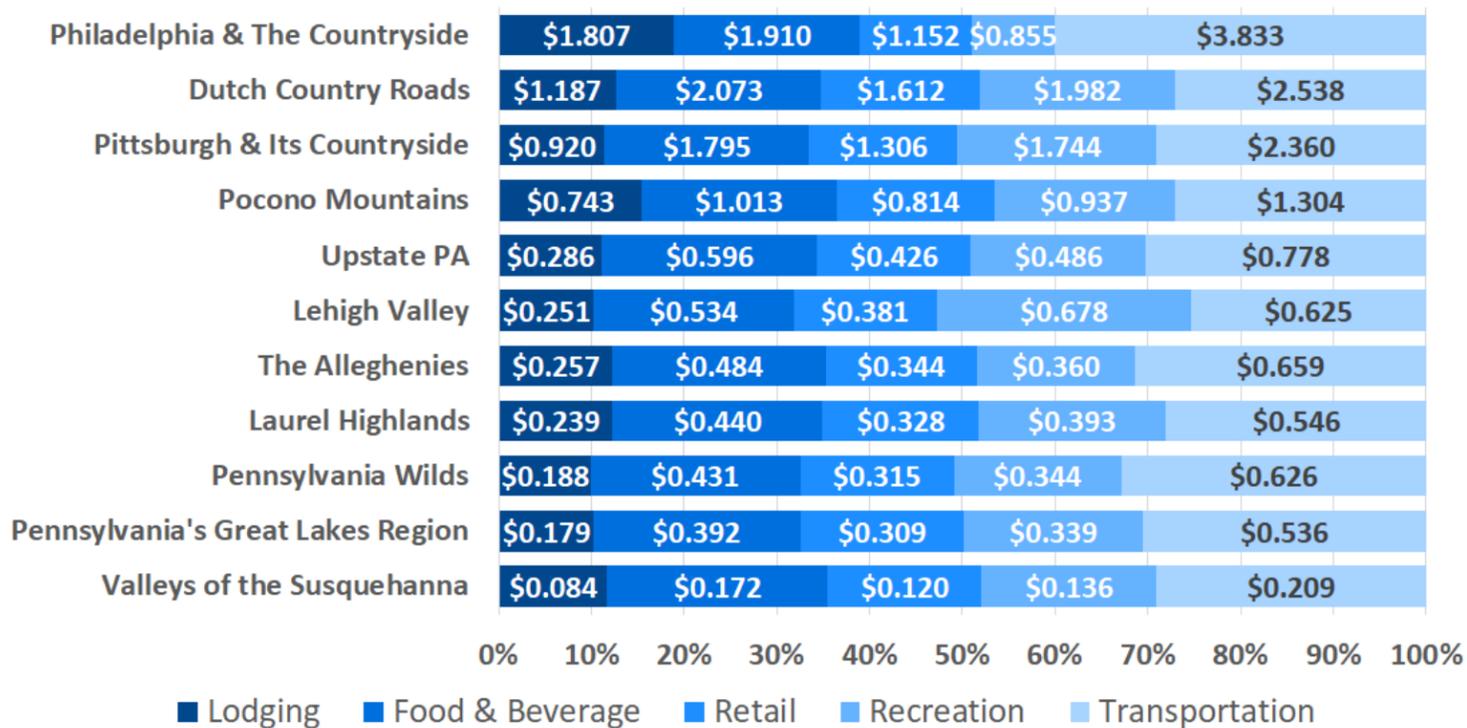


Source: Tourism Economics

# PENNSYLVANIA TOURISM REGIONS

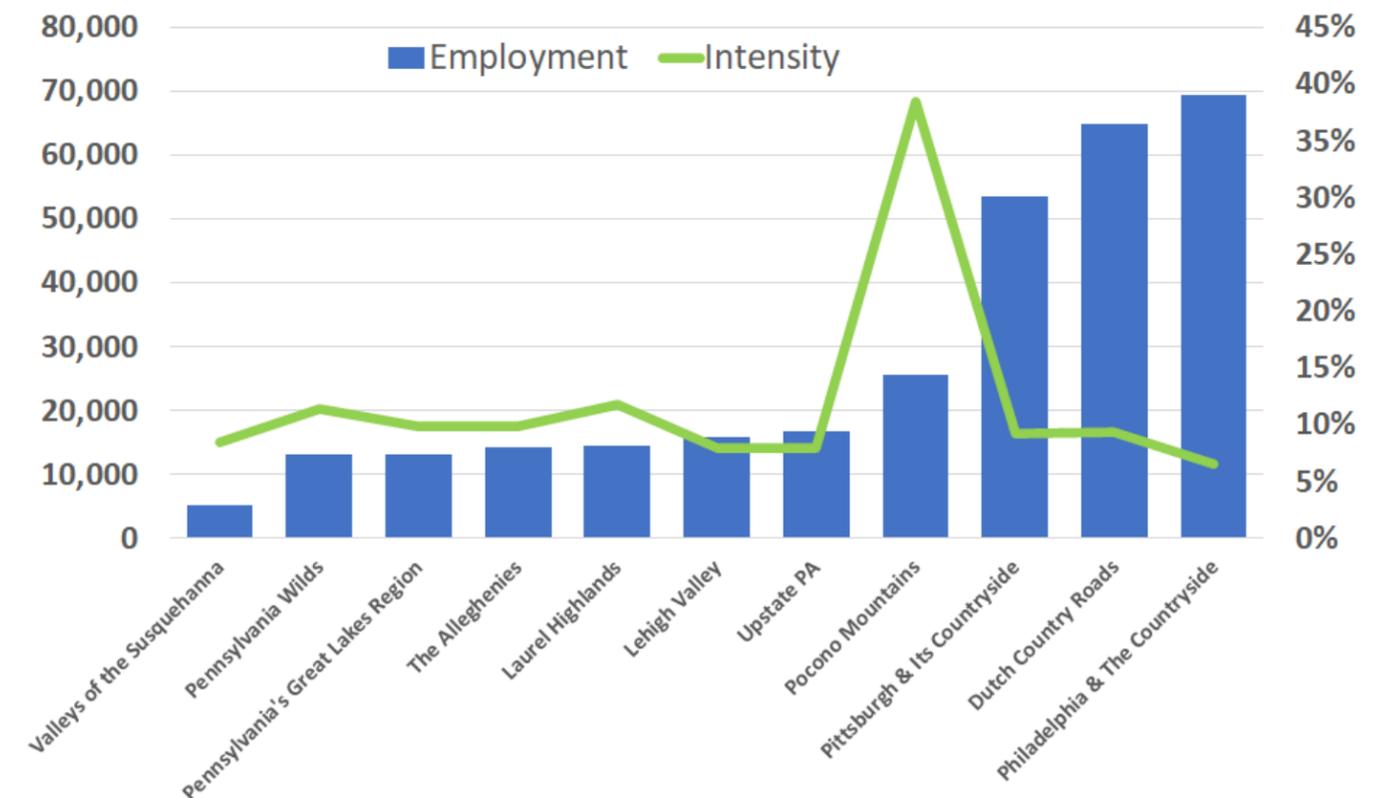
Pittsburgh and Its Countryside, Dutch Country Roads, and Pocono Mountains regions together accounted for 57% of traveler spending on recreation in 2022, well above their combined 49% share of Pa's total visitor spending. Travelers spent more than \$1 billion on lodging in the Philadelphia and The Countryside and Dutch Country Roads regions, which together accounted for close to 50% of the total amount of traveler dollars spent on accommodations in Pa in 2022.

**Dollar amount and category share of traveler spending by region, 2022**  
in \$billions



As in previous years, the Pocono Mountains region had the highest proportion (39%) of the region's total employment count (i.e., intensity) tied to travel and tourism among Pennsylvania's 11 tourism regions in 2022, while Philadelphia and The Countryside region had the highest number of employees tied to travel- and tourism.

**Travel and Tourism Industry Employment & Intensity by Region, 2022**



Source: Tourism Economics



# PENNSYLVANIA'S GREAT LAKES REGION Visitor Spending

Visitor spending rose 13% in Pennsylvania's Great Lakes Region in 2022, with every county in the region surpassing its pre-pandemic level.

## Pennsylvania's Great Lakes Region, Visitor Spending by Category

Amounts in \$ millions, 2021-2022 % change

| County, 2022          | Lodging        | Food & beverages | Retail         | Recreation     | Transportation | Total            |
|-----------------------|----------------|------------------|----------------|----------------|----------------|------------------|
| Crawford              | \$13.0         | \$61.7           | \$41.9         | \$39.4         | \$101.4        | \$257.4          |
| Erie                  | \$121.8        | \$229.4          | \$187.0        | \$219.9        | \$280.8        | \$1,038.8        |
| Mercer                | \$33.8         | \$74.4           | \$58.9         | \$57.9         | \$84.8         | \$309.8          |
| Venango               | \$10.1         | \$26.3           | \$21.0         | \$21.7         | \$68.7         | \$147.8          |
| <b>Great Lakes</b>    | <b>\$178.7</b> | <b>\$391.8</b>   | <b>\$308.8</b> | <b>\$338.9</b> | <b>\$535.7</b> | <b>\$1,753.8</b> |
| <b>Percent Change</b> | <b>12.5%</b>   | <b>11.7%</b>     | <b>4.7%</b>    | <b>22.7%</b>   | <b>15.0%</b>   | <b>13.4%</b>     |
| County, 2021          |                |                  |                |                |                |                  |
| Crawford              | \$11.7         | \$53.8           | \$38.8         | \$32.2         | \$83.8         | \$220.3          |
| Erie                  | \$109.8        | \$209.3          | \$179.3        | \$180.0        | \$249.3        | \$927.7          |
| Mercer                | \$28.7         | \$64.8           | \$57.2         | \$46.9         | \$73.1         | \$270.7          |
| Venango               | \$8.6          | \$22.7           | \$19.7         | \$17.2         | \$59.6         | \$127.8          |
| <b>Great Lakes</b>    | <b>\$158.8</b> | <b>\$350.7</b>   | <b>\$295.1</b> | <b>\$276.2</b> | <b>\$465.8</b> | <b>\$1,546.5</b> |

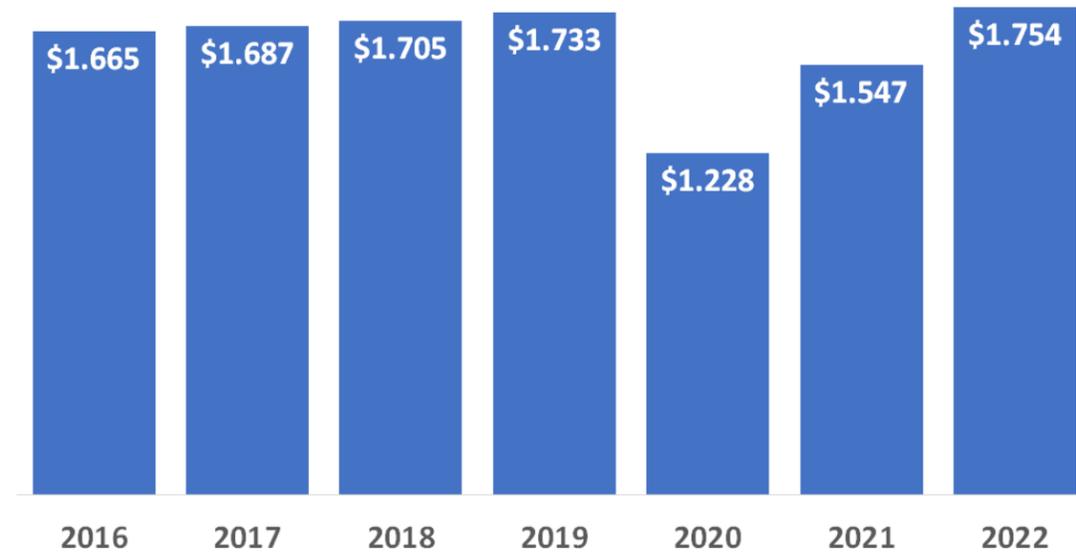
Lodging includes short-term rentals and other 2nd home spending

Transportation includes both ground and air transportation

Sources: STR, County bed tax revenues, PA DOR, Tourism Economics

## Pennsylvania's Great Lakes Region - Visitor Spending, 2016-2022

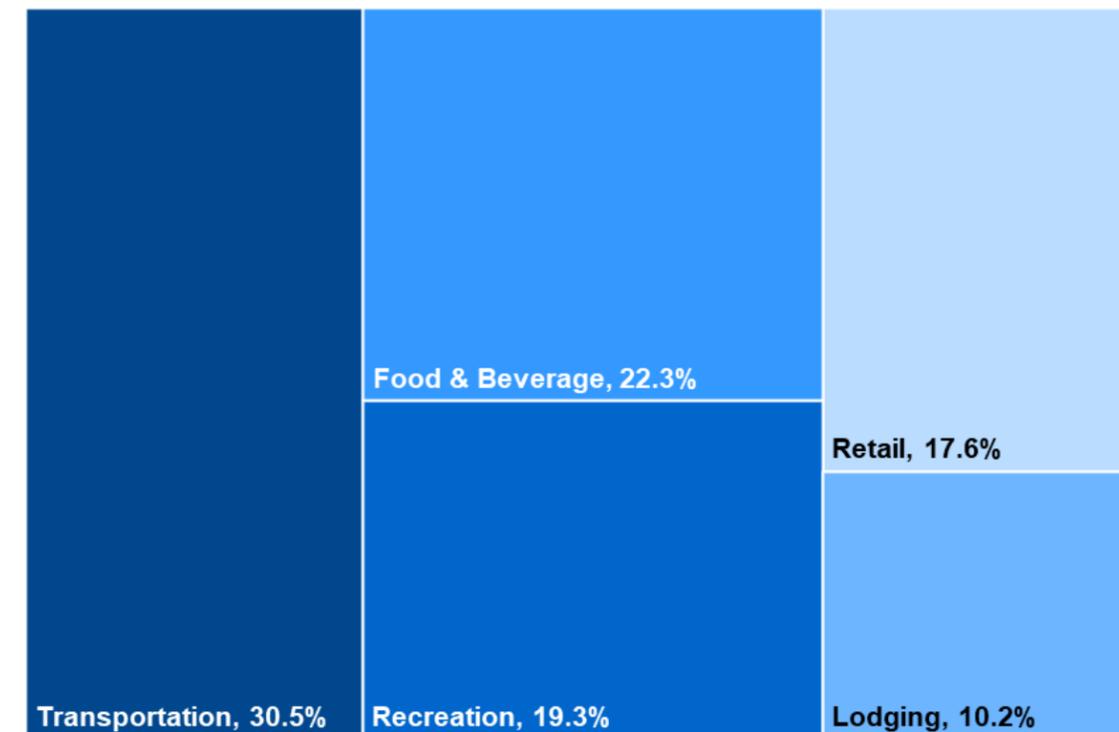
Amounts in \$ billions



Source: Tourism Economics

## Visitor Spending by Category, 2022

Percent of region total



Source: Tourism Economics

# PENNSYLVANIA'S GREAT LAKES REGION

## Economic Impacts

### Tourism Satellite Account

\$ millions, 2021-2022 percent change

| County, 2022                   | Visitor Spending | Government    | Investment/<br>PCE | Total Tourism Demand |
|--------------------------------|------------------|---------------|--------------------|----------------------|
| Crawford                       | \$257.4          | \$0.8         | \$13.6             | \$271.8              |
| Erie                           | \$1,038.8        | \$7.4         | \$50.2             | \$1,096.4            |
| Mercer                         | \$309.8          | \$1.5         | \$15.0             | \$326.2              |
| Venango                        | \$147.8          | \$0.5         | \$7.7              | \$155.9              |
| <b>Pa's Great Lakes Region</b> | <b>\$1,753.8</b> | <b>\$10.1</b> | <b>\$86.5</b>      | <b>\$1,850.4</b>     |
| <b>Percent Change</b>          | <b>13.4%</b>     | <b>13.8%</b>  | <b>-2.4%</b>       | <b>12.6%</b>         |
| County, 2021                   |                  |               |                    |                      |
| Crawford                       | \$220.3          | \$0.7         | \$13.5             | \$234.5              |
| Erie                           | \$927.7          | \$6.5         | \$52.2             | \$986.4              |
| Mercer                         | \$270.7          | \$1.2         | \$15.3             | \$287.3              |
| Venango                        | \$127.8          | \$0.4         | \$7.7              | \$136.0              |
| <b>Pa's Great Lakes Region</b> | <b>\$1,546.5</b> | <b>\$8.9</b>  | <b>\$88.7</b>      | <b>\$1,644.1</b>     |

Source: Tourism Economics

### Travel and Tourism INDUSTRY (direct) Impacts

\$ millions, except employment (in units), 2021-2022 percent change

| County, 2022                  | Visitor Spend    | Employment    | Labor Income   | Taxes         |               |
|-------------------------------|------------------|---------------|----------------|---------------|---------------|
|                               |                  |               |                | State/Local   | Federal       |
| Crawford                      | \$257.4          | 2,046         | \$59.9         | \$12.4        | \$14.2        |
| Erie                          | \$1,038.8        | 7,414         | \$245.2        | \$54.5        | \$57.8        |
| Mercer                        | \$309.8          | 2,442         | \$66.0         | \$15.0        | \$16.1        |
| Venango                       | \$147.8          | 1,264         | \$32.8         | \$7.0         | \$7.9         |
| <b>Pa's Great Lakes Reg'n</b> | <b>\$1,753.8</b> | <b>13,166</b> | <b>\$403.8</b> | <b>\$88.9</b> | <b>\$96.0</b> |
| <b>Percent Change</b>         | <b>13.4%</b>     | <b>6.2%</b>   | <b>10.1%</b>   | <b>6.7%</b>   | <b>3.5%</b>   |
| County, 2021                  |                  |               |                |               |               |
| Crawford                      | \$220.3          | 1,940         | \$54.1         | \$11.5        | \$13.5        |
| Erie                          | \$927.7          | 6,959         | \$220.2        | \$51.2        | \$55.7        |
| Mercer                        | \$270.7          | 2,314         | \$62.1         | \$14.1        | \$15.9        |
| Venango                       | \$127.8          | 1,188         | \$30.4         | \$6.6         | \$7.7         |
| <b>Pa's Great Lakes Reg'n</b> | <b>\$1,546.5</b> | <b>12,400</b> | <b>\$366.9</b> | <b>\$83.3</b> | <b>\$92.8</b> |

### Travel and Tourism ECONOMY (total) Impacts

\$ millions, except employment (in units), 2021-2022 percent change

| County, 2022                 | Visitor Spend    | Employment    | Labor Income   | Taxes          |                |
|------------------------------|------------------|---------------|----------------|----------------|----------------|
|                              |                  |               |                | State/Local    | Federal        |
| Crawford                     | \$271.8          | 3,228         | \$111.9        | \$23.9         | \$25.4         |
| Erie                         | \$1,096.4        | 11,460        | \$451.5        | \$101.1        | \$103.6        |
| Mercer                       | \$326.2          | 3,763         | \$120.7        | \$28.3         | \$29.0         |
| Venango                      | \$155.9          | 1,933         | \$59.7         | \$13.5         | \$14.2         |
| <b>Pa Great Lakes Region</b> | <b>\$1,850.4</b> | <b>20,384</b> | <b>\$743.8</b> | <b>\$166.7</b> | <b>\$172.2</b> |
| <b>Percent Change</b>        | <b>12.6%</b>     | <b>5.4%</b>   | <b>7.4%</b>    | <b>6.0%</b>    | <b>3.5%</b>    |
| County, 2021                 |                  |               |                |                |                |
| Crawford                     | \$234.5          | 3,078         | \$103.4        | \$22.2         | \$24.2         |
| Erie                         | \$986.4          | 10,836        | \$417.2        | \$95.6         | \$99.9         |
| Mercer                       | \$287.3          | 3,594         | \$115.2        | \$26.9         | \$28.5         |
| Venango                      | \$136.0          | 1,832         | \$56.5         | \$12.7         | \$13.8         |
| <b>Pa Great Lakes Region</b> | <b>\$1,644.1</b> | <b>19,340</b> | <b>\$692.3</b> | <b>\$157.3</b> | <b>\$166.4</b> |

Source: Tourism Economics

# PENNSYLVANIA'S GREAT LAKES REGION

## Visitor Spending & Employment, 2016-2022

Employment directly supported by visitor spending in Pennsylvania's Great Lakes Region increased by 766 jobs in 2022, a 6% increase, with employment remaining five percentage points below the region's pre-pandemic level.

### Travel and Tourism Industry Timelines, Visitor Spending & Employment

Visitor spending in \$ millions, employment in units

|                         | 2016             | 2017             | 2018             | 2019             | 2020             | 2021             | 2022             | % relative to 2019 |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|--------------------|
| Crawford                | \$248.1          | \$251.7          | \$248.6          | \$253.0          | \$177.3          | \$220.3          | \$257.4          | 101.7%             |
| Erie                    | \$969.4          | \$988.8          | \$996.5          | \$1,019.3        | \$733.1          | \$927.7          | \$1,038.8        | 101.9%             |
| Mercer                  | \$307.4          | \$305.7          | \$313.7          | \$314.8          | \$221.2          | \$270.7          | \$309.8          | 98.4%              |
| Venango                 | \$140.3          | \$141.1          | \$146.5          | \$146.2          | \$96.5           | \$127.8          | \$147.8          | 101.1%             |
| <b>Pa's Great Lakes</b> | <b>\$1,665.2</b> | <b>\$1,687.3</b> | <b>\$1,705.3</b> | <b>\$1,733.4</b> | <b>\$1,228.1</b> | <b>\$1,546.5</b> | <b>\$1,753.8</b> | <b>101.2%</b>      |
| <b>Percent Change</b>   | <b>-0.8%</b>     | <b>1.3%</b>      | <b>1.1%</b>      | <b>1.6%</b>      | <b>-29.2%</b>    | <b>25.9%</b>     | <b>13.4%</b>     |                    |

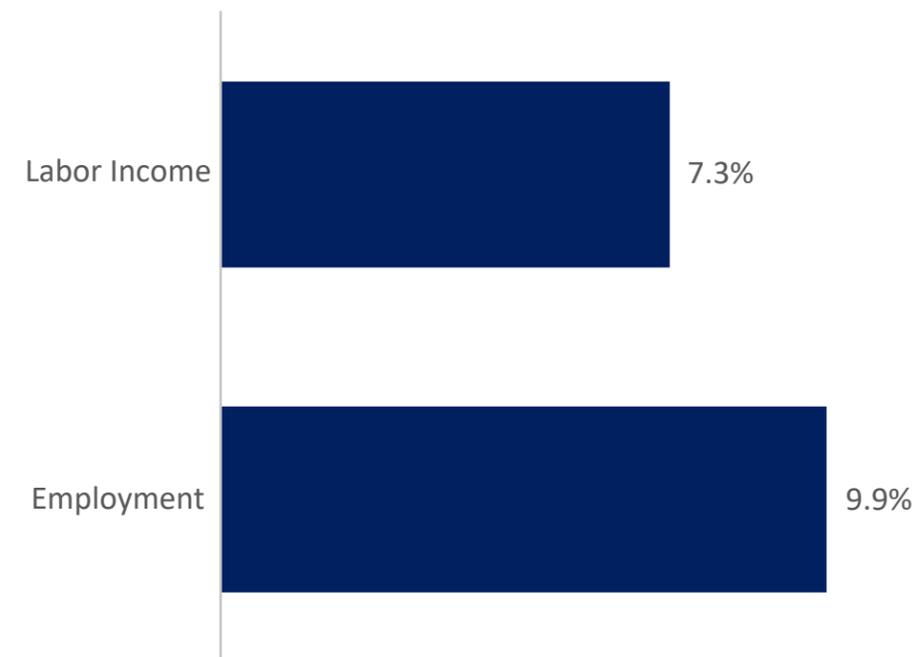
|                         | 2016          | 2017          | 2018          | 2019          | 2020          | 2021          | 2022          | % relative to 2019 |
|-------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|--------------------|
| Crawford                | 2,156         | 2,123         | 2,109         | 2,129         | 1,738         | 1,940         | 2,046         | 96.1%              |
| Erie                    | 7,768         | 7,796         | 7,846         | 7,983         | 6,161         | 6,959         | 7,414         | 92.9%              |
| Mercer                  | 2,584         | 2,561         | 2,561         | 2,595         | 2,052         | 2,314         | 2,442         | 94.1%              |
| Venango                 | 1,196         | 1,192         | 1,214         | 1,231         | 1,066         | 1,188         | 1,264         | 102.7%             |
| <b>Pa's Great Lakes</b> | <b>13,705</b> | <b>13,671</b> | <b>13,730</b> | <b>13,938</b> | <b>11,018</b> | <b>12,400</b> | <b>13,166</b> | <b>94.5%</b>       |
| <b>Percent Change</b>   | <b>0.1%</b>   | <b>-0.2%</b>  | <b>0.4%</b>   | <b>1.5%</b>   | <b>-20.9%</b> | <b>12.5%</b>  | <b>6.2%</b>   |                    |

Source: Tourism Economics

The 13,166 jobs supported by visitor spending in Pennsylvania's Great Lakes Region represented nearly 1 out of every 10 jobs in the region in 2022.

### Travel and Tourism Industry Share of Region Economy, 2022

Travel and tourism industry share of payroll employment and income



Source: BLS, Tourism Economics



# LAUREL HIGHLANDS Visitor Spending

Visitor spending grew 17% in the Laurel Highlands region in 2022, surpassing the region's pre-pandemic level.

## Laurel Highlands, Visitor Spending by Category

Amounts in \$ millions, 2021-2022 % change

| County, 2022            | Lodging        | Food & beverages | Retail         | Recreation     | Transportation | Total            |
|-------------------------|----------------|------------------|----------------|----------------|----------------|------------------|
| Fayette                 | \$107.2        | \$156.1          | \$110.3        | \$134.5        | \$174.3        | \$682.3          |
| Somerset                | \$64.7         | \$108.8          | \$74.5         | \$87.6         | \$141.4        | \$476.9          |
| Westmoreland            | \$66.9         | \$175.4          | \$143.1        | \$170.8        | \$230.6        | \$786.8          |
| <b>Laurel Highlands</b> | <b>\$238.7</b> | <b>\$440.4</b>   | <b>\$327.8</b> | <b>\$392.8</b> | <b>\$546.2</b> | <b>\$1,946.0</b> |
| <b>Percent Change</b>   | <b>19.8%</b>   | <b>14.9%</b>     | <b>7.3%</b>    | <b>24.3%</b>   | <b>17.5%</b>   | <b>16.6%</b>     |

| County, 2021            | Lodging        | Food & beverages | Retail         | Recreation     | Transportation | Total            |
|-------------------------|----------------|------------------|----------------|----------------|----------------|------------------|
| Fayette                 | \$92.4         | \$140.1          | \$107.1        | \$112.2        | \$150.7        | \$602.4          |
| Somerset                | \$52.4         | \$92.1           | \$67.6         | \$68.7         | \$113.4        | \$394.2          |
| Westmoreland            | \$54.5         | \$151.0          | \$130.9        | \$135.2        | \$200.9        | \$672.6          |
| <b>Laurel Highlands</b> | <b>\$199.3</b> | <b>\$383.2</b>   | <b>\$305.6</b> | <b>\$316.1</b> | <b>\$465.0</b> | <b>\$1,669.2</b> |

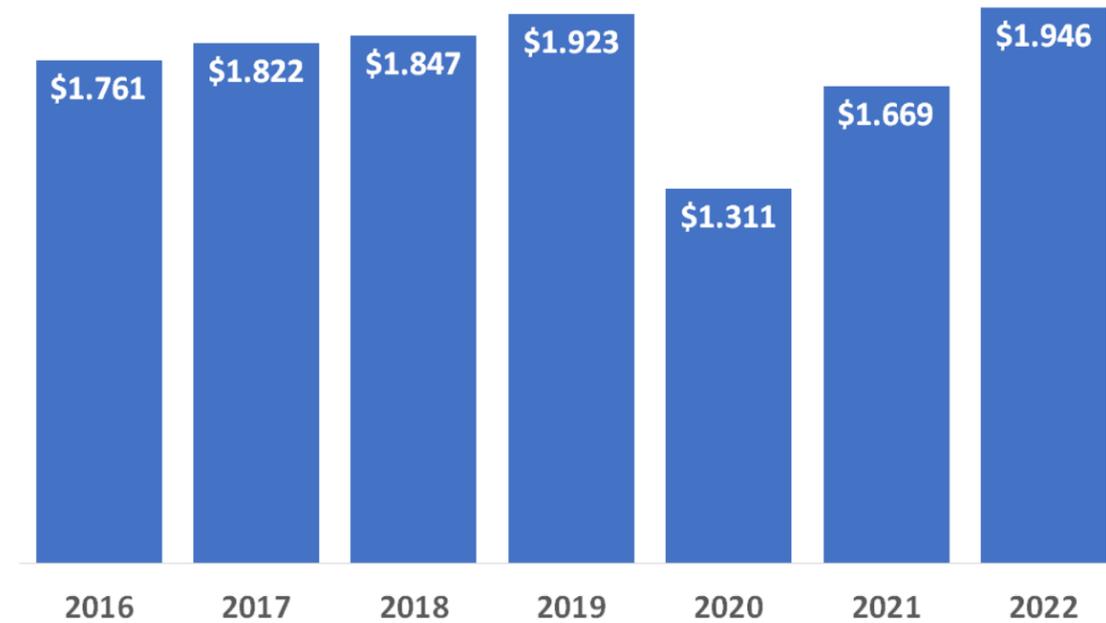
Lodging includes short-term rentals and other 2nd home spending

Transportation includes both ground and air transportation

Sources: STR, County bed tax revenues, PA DOR, Tourism Economics

## Laurel Highlands - Visitor Spending, 2016-2022

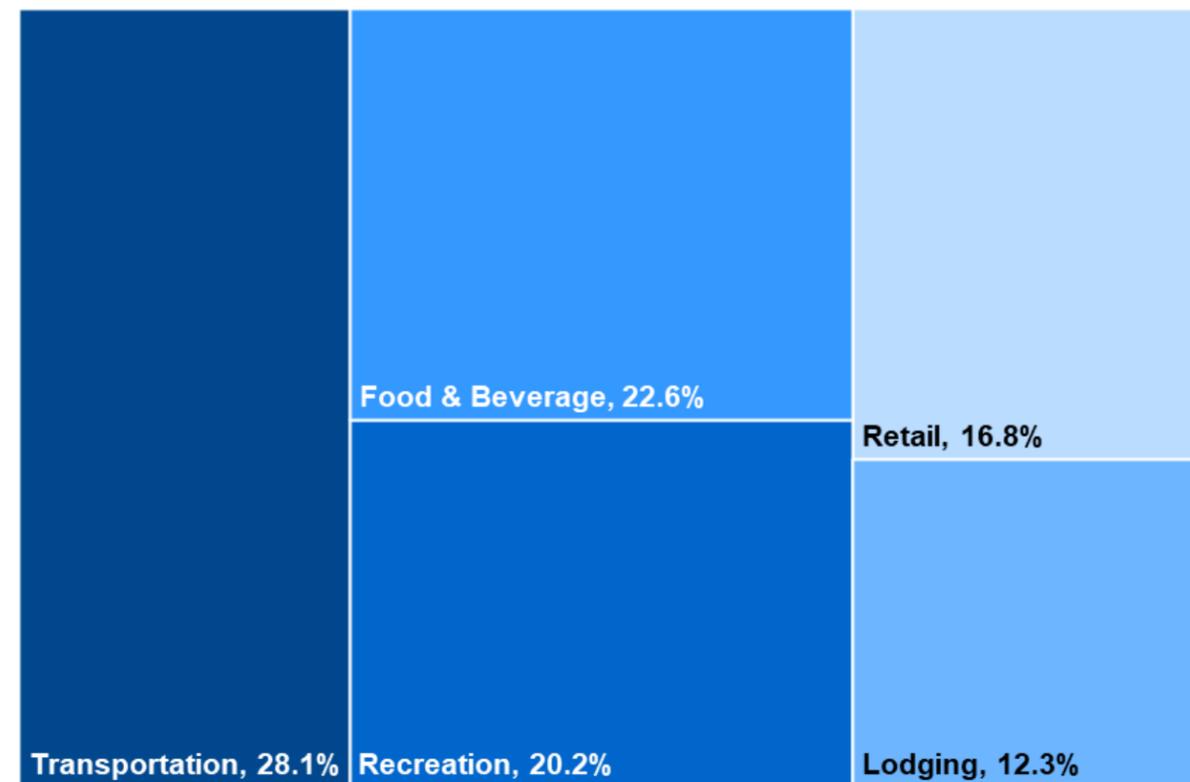
Amounts in \$ billions



Source: Tourism Economics

## Visitor Spending by Category, 2022

Percent of region total



Source: Tourism Economics

# LAUREL HIGHLANDS

## Economic Impacts

### Tourism Satellite Account

\$ millions, 2021-2022 percent change

| County, 2022            | Visitor Spending | Government   | Investment/ PCE | Total Tourism Demand |
|-------------------------|------------------|--------------|-----------------|----------------------|
| Fayette                 | \$682.3          | \$3.9        | \$32.9          | \$719.1              |
| Somerset                | \$476.9          | \$2.4        | \$23.9          | \$503.2              |
| Westmoreland            | \$786.8          | \$3.6        | \$38.2          | \$828.6              |
| <b>Laurel Highlands</b> | <b>\$1,946.0</b> | <b>\$9.9</b> | <b>\$94.9</b>   | <b>\$2,050.9</b>     |
| <b>Percent Change</b>   | <b>16.6%</b>     | <b>14.5%</b> | <b>0.2%</b>     | <b>15.7%</b>         |

| County, 2021            | Visitor Spending | Government   | Investment/ PCE | Total Tourism Demand |
|-------------------------|------------------|--------------|-----------------|----------------------|
| Fayette                 | \$602.4          | \$3.6        | \$33.8          | \$639.9              |
| Somerset                | \$394.2          | \$2.0        | \$22.9          | \$419.1              |
| Westmoreland            | \$672.6          | \$3.0        | \$38.0          | \$713.6              |
| <b>Laurel Highlands</b> | <b>\$1,669.2</b> | <b>\$8.6</b> | <b>\$94.8</b>   | <b>\$1,772.6</b>     |

Source: Tourism Economics

### Travel and Tourism INDUSTRY (direct) Impacts

\$ millions, except employment (in units), 2021-2022 percent change

| County, 2022            | Visitor Spend    | Employment    | Labor Income   | Taxes          |                |
|-------------------------|------------------|---------------|----------------|----------------|----------------|
|                         |                  |               |                | State/Local    | Federal        |
| Fayette                 | \$682.3          | 5,628         | \$210.6        | \$38.7         | \$45.4         |
| Somerset                | \$476.9          | 3,225         | \$99.9         | \$23.1         | \$24.6         |
| Westmoreland            | \$786.8          | 5,679         | \$180.4        | \$38.9         | \$43.0         |
| <b>Laurel Highlands</b> | <b>\$1,946.0</b> | <b>14,531</b> | <b>\$490.8</b> | <b>\$100.7</b> | <b>\$113.0</b> |
| <b>Percent Change</b>   | <b>16.6%</b>     | <b>7.3%</b>   | <b>11.5%</b>   | <b>8.6%</b>    | <b>5.4%</b>    |

| County, 2021            | Visitor Spend    | Employment    | Labor Income   | State/Local   | Federal        |
|-------------------------|------------------|---------------|----------------|---------------|----------------|
| Fayette                 | \$602.4          | 5,298         | \$192.7        | \$36.8        | \$44.1         |
| Somerset                | \$394.2          | 2,921         | \$86.0         | \$20.3        | \$22.4         |
| Westmoreland            | \$672.6          | 5,326         | \$161.7        | \$35.6        | \$40.7         |
| <b>Laurel Highlands</b> | <b>\$1,669.2</b> | <b>13,546</b> | <b>\$440.4</b> | <b>\$92.8</b> | <b>\$107.2</b> |

### Travel and Tourism ECONOMY (total) Impacts

\$ millions, except employment (in units), 2021-2022 percent change

| County, 2022            | Visitor Spend    | Employment    | Labor Income   | Taxes          |                |
|-------------------------|------------------|---------------|----------------|----------------|----------------|
|                         |                  |               |                | State/Local    | Federal        |
| Fayette                 | \$719.1          | 8,194         | \$399.0        | \$73.3         | \$81.3         |
| Somerset                | \$503.2          | 4,686         | \$185.5        | \$43.4         | \$44.2         |
| Westmoreland            | \$828.6          | 9,538         | \$345.2        | \$73.7         | \$77.1         |
| <b>Laurel Highlands</b> | <b>\$2,050.9</b> | <b>22,418</b> | <b>\$929.8</b> | <b>\$190.4</b> | <b>\$202.5</b> |
| <b>Percent Change</b>   | <b>15.7%</b>     | <b>6.5%</b>   | <b>9.1%</b>    | <b>7.9%</b>    | <b>5.4%</b>    |

| County, 2021            | Visitor Spend    | Employment    | Labor Income   | State/Local    | Federal        |
|-------------------------|------------------|---------------|----------------|----------------|----------------|
| Fayette                 | \$639.9          | 7,735         | \$371.6        | \$70.0         | \$78.9         |
| Somerset                | \$419.1          | 4,313         | \$166.2        | \$38.5         | \$40.3         |
| Westmoreland            | \$713.6          | 9,009         | \$314.4        | \$67.9         | \$73.0         |
| <b>Laurel Highlands</b> | <b>\$1,772.6</b> | <b>21,057</b> | <b>\$852.2</b> | <b>\$176.5</b> | <b>\$192.2</b> |

Source: Tourism Economics

# LAUREL HIGHLANDS

## Visitor Spending & Employment, 2016-2022

Employment directly supported by visitor spending increased by nearly 1,000 jobs in 2022, a 7% increase from 2021, but travel-related employment in the region remained four percentage points below its pre-pandemic level.

### Travel and Tourism Industry Timelines, Visitor Spending & Employment

Visitor spending in \$ millions, employment in units

|                         | 2016             | 2017             | 2018             | 2019             | 2020             | 2021             | 2022             | % relative to 2019 |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|--------------------|
| Fayette                 | \$661.8          | \$684.8          | \$690.2          | \$733.8          | \$458.0          | \$602.4          | \$682.3          | 93.0%              |
| Somerset                | \$377.4          | \$392.0          | \$398.7          | \$416.8          | \$331.5          | \$394.2          | \$476.9          | 114.4%             |
| Westmoreland            | \$721.3          | \$745.4          | \$758.5          | \$772.7          | \$521.4          | \$672.6          | \$786.8          | 101.8%             |
| <b>Laurel Highlands</b> | <b>\$1,760.5</b> | <b>\$1,822.2</b> | <b>\$1,847.3</b> | <b>\$1,923.2</b> | <b>\$1,310.9</b> | <b>\$1,669.2</b> | <b>\$1,946.0</b> | <b>101.2%</b>      |
| <b>Percent Change</b>   | <b>-3.3%</b>     | <b>3.5%</b>      | <b>1.4%</b>      | <b>4.1%</b>      | <b>-31.8%</b>    | <b>27.3%</b>     | <b>16.6%</b>     |                    |

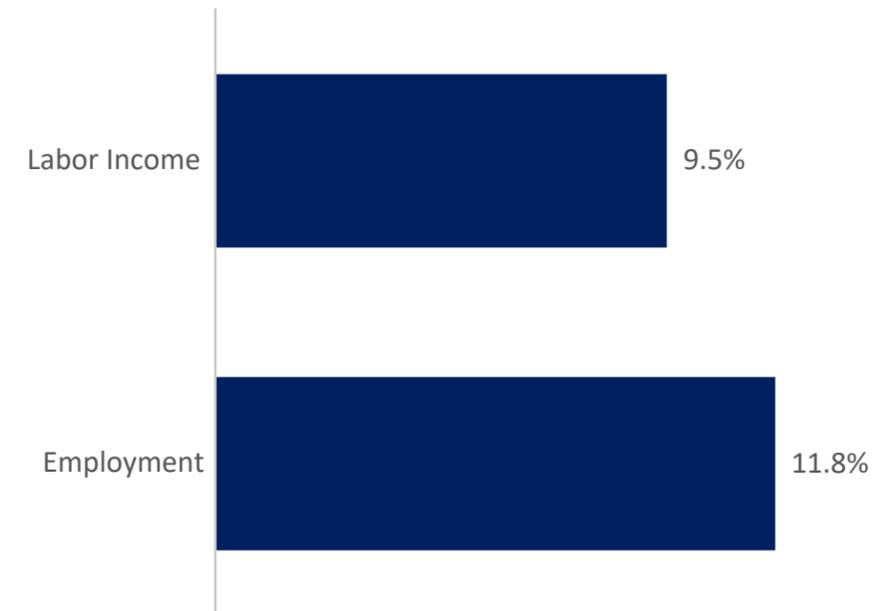
|                         | 2016          | 2017          | 2018          | 2019          | 2020          | 2021          | 2022          | % relative to 2019 |
|-------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|--------------------|
| Fayette                 | 5,852         | 5,914         | 5,821         | 5,985         | 4,709         | 5,298         | 5,628         | 94.0%              |
| Somerset                | 3,233         | 3,261         | 3,281         | 3,345         | 2,626         | 2,921         | 3,225         | 96.4%              |
| Westmoreland            | 5,649         | 5,703         | 5,744         | 5,855         | 4,666         | 5,326         | 5,679         | 97.0%              |
| <b>Laurel Highlands</b> | <b>14,735</b> | <b>14,878</b> | <b>14,846</b> | <b>15,185</b> | <b>12,001</b> | <b>13,546</b> | <b>14,531</b> | <b>95.7%</b>       |
| <b>Percent Change</b>   | <b>-0.6%</b>  | <b>1.0%</b>   | <b>-0.2%</b>  | <b>2.3%</b>   | <b>-21.0%</b> | <b>12.9%</b>  | <b>7.3%</b>   |                    |

Source: Tourism Economics

The 14,530 jobs supported by visitor spending in the Laurel Highlands region represented 1 out of every 8.5 jobs in the region in 2022.

### Travel and Tourism Industry Share of Region Economy, 2022

Travel and tourism industry share of payroll employment and income



Source: BLS, Tourism Economics



# PITTSBURGH AND ITS COUNTRYSIDE

## Visitor Spending

Visitor spending rose 25% in the Pittsburgh and Its Countryside region in 2022 to be within 7% of its pre-pandemic level.

### Pittsburgh and Its Countryside, Visitor Spending by Category

Amounts in \$ millions, 2021-2022 % change

| County, 2022                          | Lodging        | Food & beverages | Retail           | Recreation       | Transportation   | Total            |
|---------------------------------------|----------------|------------------|------------------|------------------|------------------|------------------|
| Allegheny                             | \$720.0        | \$1,325.5        | \$954.5          | \$1,291.2        | \$1,748.1        | \$6,039.3        |
| Armstrong                             | \$5.8          | \$21.1           | \$14.4           | \$27.1           | \$32.0           | \$100.4          |
| Beaver                                | \$30.0         | \$73.5           | \$53.4           | \$57.7           | \$110.1          | \$324.7          |
| Butler                                | \$68.2         | \$139.7          | \$109.2          | \$114.4          | \$170.3          | \$601.8          |
| Greene                                | \$7.6          | \$18.5           | \$11.8           | \$13.9           | \$25.8           | \$77.7           |
| Indiana                               | \$15.9         | \$41.7           | \$28.1           | \$29.1           | \$50.8           | \$165.6          |
| Lawrence                              | \$9.0          | \$34.7           | \$27.6           | \$35.8           | \$42.0           | \$149.1          |
| Washington                            | \$63.8         | \$139.8          | \$106.6          | \$175.0          | \$180.6          | \$665.9          |
| <b>Pittsburgh and Its Countryside</b> | <b>\$920.3</b> | <b>\$1,794.6</b> | <b>\$1,305.5</b> | <b>\$1,744.3</b> | <b>\$2,359.6</b> | <b>\$8,124.3</b> |
| <b>Percent Change</b>                 | <b>38.5%</b>   | <b>23.8%</b>     | <b>15.3%</b>     | <b>33.2%</b>     | <b>22.1%</b>     | <b>25.2%</b>     |

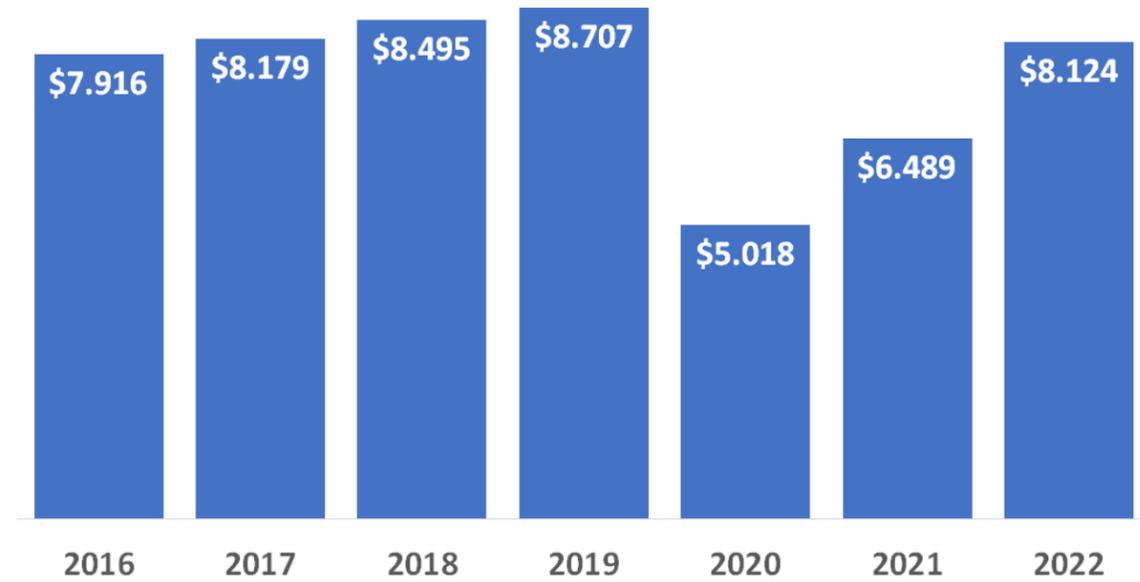
| County, 2021                          | Lodging        | Food & beverages | Retail           | Recreation       | Transportation   | Total            |
|---------------------------------------|----------------|------------------|------------------|------------------|------------------|------------------|
| Allegheny                             | \$492.5        | \$1,032.9        | \$798.3          | \$950.1          | \$1,404.1        | \$4,677.9        |
| Armstrong                             | \$5.0          | \$19.1           | \$13.3           | \$23.8           | \$28.8           | \$90.0           |
| Beaver                                | \$26.7         | \$66.6           | \$51.6           | \$45.4           | \$94.2           | \$284.5          |
| Butler                                | \$53.4         | \$119.7          | \$101.6          | \$87.1           | \$145.9          | \$507.7          |
| Greene                                | \$7.3          | \$16.9           | \$11.7           | \$11.9           | \$22.9           | \$70.7           |
| Indiana                               | \$13.0         | \$35.5           | \$26.7           | \$23.6           | \$41.5           | \$140.2          |
| Lawrence                              | \$7.1          | \$32.0           | \$25.2           | \$25.9           | \$34.0           | \$124.2          |
| Washington                            | \$59.3         | \$127.6          | \$103.6          | \$141.8          | \$161.7          | \$594.1          |
| <b>Pittsburgh and Its Countryside</b> | <b>\$664.3</b> | <b>\$1,450.1</b> | <b>\$1,132.0</b> | <b>\$1,309.7</b> | <b>\$1,933.1</b> | <b>\$6,489.3</b> |

Lodging includes short-term rentals and other 2nd home spending  
 Transportation includes both ground and air transportation

Sources: STR, County bed tax revenues, PA DOR, Tourism Economics

### Pittsburgh and Its Countryside - Visitor Spending, 2016-2022

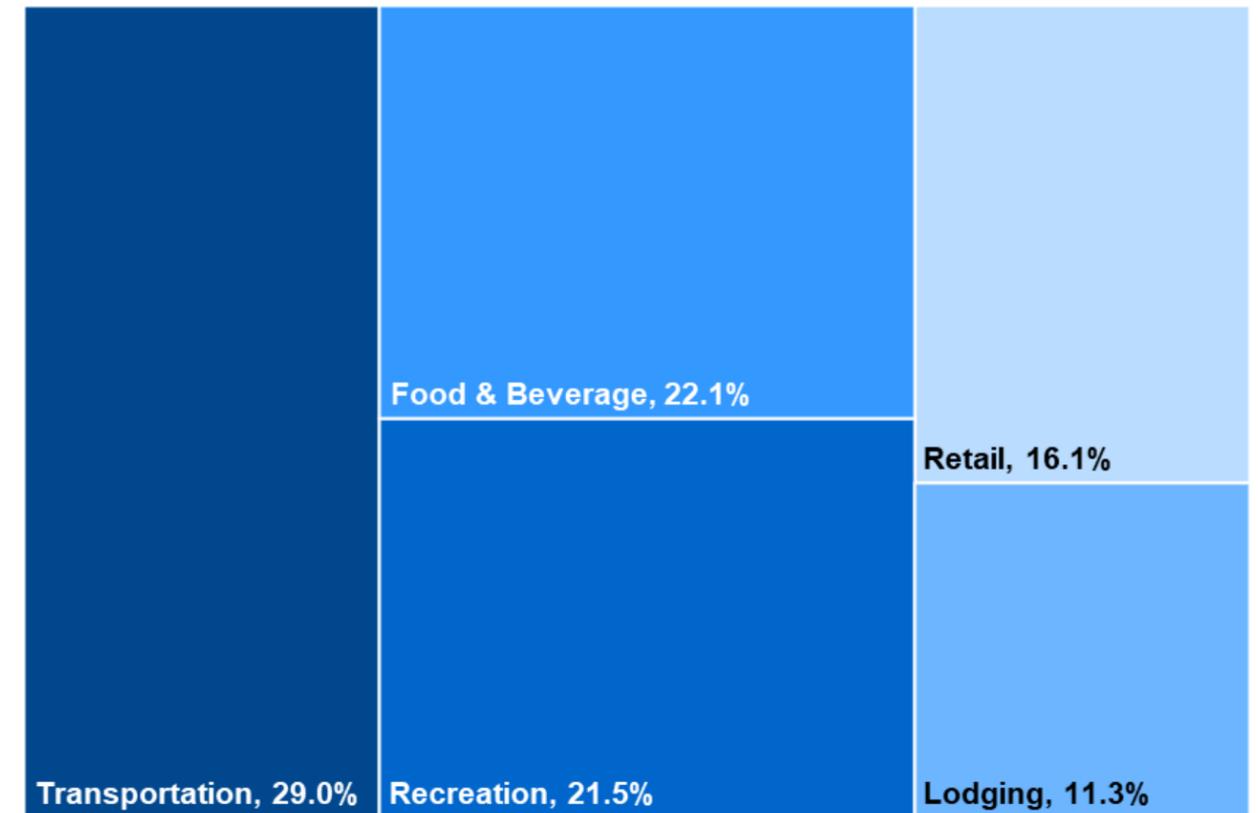
Amounts in \$ billions



Source: Tourism Economics

### Visitor Spending by Category, 2022

Percent of region total



Source: Tourism Economics

# PITTSBURGH AND ITS COUNTRYSIDE

## Economic Impacts

### Tourism Satellite Account

\$ millions, 2021-2022 percent change

| County, 2022                          | Visitor Spending | Government    | Investment/ PCE | Total Tourism Demand |
|---------------------------------------|------------------|---------------|-----------------|----------------------|
| Allegheny                             | \$6,039.3        | \$45.1        | \$289.1         | \$6,373.4            |
| Armstrong                             | \$100.4          | \$0.3         | \$5.1           | \$105.7              |
| Beaver                                | \$324.7          | \$1.3         | \$15.6          | \$341.6              |
| Butler                                | \$601.8          | \$3.1         | \$29.2          | \$634.1              |
| Greene                                | \$77.7           | \$0.3         | \$3.8           | \$81.8               |
| Indiana                               | \$165.6          | \$0.7         | \$8.1           | \$174.4              |
| Lawrence                              | \$149.1          | \$0.5         | \$7.2           | \$156.8              |
| Washington                            | \$665.9          | \$2.7         | \$32.1          | \$700.7              |
| <b>Pittsburgh and Its Countryside</b> | <b>\$8,124.3</b> | <b>\$54.1</b> | <b>\$390.2</b>  | <b>\$8,568.5</b>     |
| <b>Percent Change</b>                 | <b>25.2%</b>     | <b>39.2%</b>  | <b>7.3%</b>     | <b>24.3%</b>         |

| County, 2021                          | Visitor Spending | Government    | Investment/ PCE | Total Tourism Demand |
|---------------------------------------|------------------|---------------|-----------------|----------------------|
| Allegheny                             | \$4,677.9        | \$30.5        | \$261.4         | \$4,969.8            |
| Armstrong                             | \$90.0           | \$0.2         | \$5.3           | \$95.5               |
| Beaver                                | \$284.5          | \$1.2         | \$15.9          | \$301.6              |
| Butler                                | \$507.7          | \$2.5         | \$28.6          | \$538.9              |
| Greene                                | \$70.7           | \$0.3         | \$4.1           | \$75.0               |
| Indiana                               | \$140.2          | \$0.6         | \$8.0           | \$148.8              |
| Lawrence                              | \$124.2          | \$0.4         | \$7.0           | \$131.6              |
| Washington                            | \$594.1          | \$3.1         | \$33.4          | \$630.5              |
| <b>Pittsburgh and Its Countryside</b> | <b>\$6,489.3</b> | <b>\$38.8</b> | <b>\$363.7</b>  | <b>\$6,891.8</b>     |

Source: Tourism Economics

# PITTSBURGH AND ITS COUNTRYSIDE

## Economic Impacts

### Travel and Tourism Industry (direct) Impacts

\$ millions, except employment (in units), 2021-2022 percent change

| County, 2022                          | Visitor          |               | Labor Income     | Taxes          |                |
|---------------------------------------|------------------|---------------|------------------|----------------|----------------|
|                                       | Spend            | Employment    |                  | State/Local    | Federal        |
| Allegheny                             | \$6,039.3        | 38,286        | \$1,690.6        | \$339.9        | \$376.0        |
| Armstrong                             | \$100.4          | 690           | \$19.8           | \$4.5          | \$5.0          |
| Beaver                                | \$324.7          | 2,317         | \$79.7           | \$16.3         | \$18.5         |
| Butler                                | \$601.8          | 3,949         | \$131.1          | \$29.6         | \$31.8         |
| Greene                                | \$77.7           | 526           | \$14.2           | \$3.5          | \$3.7          |
| Indiana                               | \$165.6          | 1,412         | \$40.4           | \$8.3          | \$9.4          |
| Lawrence                              | \$149.1          | 980           | \$33.1           | \$7.1          | \$8.0          |
| Washington                            | \$665.9          | 5,359         | \$200.4          | \$36.3         | \$43.6         |
| <b>Pittsburgh and Its Countryside</b> | <b>\$8,124.3</b> | <b>53,519</b> | <b>\$2,209.3</b> | <b>\$445.6</b> | <b>\$496.0</b> |
| <b>Percent Change</b>                 | <b>25.2%</b>     | <b>10.7%</b>  | <b>15.8%</b>     | <b>16.5%</b>   | <b>10.6%</b>   |
| County, 2021                          |                  |               |                  |                |                |
| Allegheny                             | \$4,677.9        | 34,223        | \$1,445.0        | \$284.1        | \$334.4        |
| Armstrong                             | \$90.0           | 635           | \$17.9           | \$4.3          | \$4.8          |
| Beaver                                | \$284.5          | 2,125         | \$69.9           | \$15.1         | \$17.5         |
| Butler                                | \$507.7          | 3,706         | \$118.5          | \$26.8         | \$30.1         |
| Greene                                | \$70.7           | 503           | \$13.5           | \$3.4          | \$3.7          |
| Indiana                               | \$140.2          | 1,297         | \$35.3           | \$7.5          | \$8.7          |
| Lawrence                              | \$124.2          | 921           | \$29.0           | \$6.4          | \$7.4          |
| Washington                            | \$594.1          | 4,915         | \$179.0          | \$34.9         | \$41.7         |
| <b>Pittsburgh and Its Countryside</b> | <b>\$6,489.3</b> | <b>48,326</b> | <b>\$1,908.1</b> | <b>\$382.5</b> | <b>\$448.4</b> |

Source: Tourism Economics

### Travel and Tourism ECONOMY (total) Impacts

\$ millions, except employment (in units), 2021-2022 percent change

| County, 2022                          | Visitor          |               | Labor Income     | Taxes          |                |
|---------------------------------------|------------------|---------------|------------------|----------------|----------------|
|                                       | Spend            | Employment    |                  | State/Local    | Federal        |
| Allegheny                             | \$6,373.4        | 58,677        | \$3,316.8        | \$631.8        | \$673.1        |
| Armstrong                             | \$105.7          | 1,236         | \$35.5           | \$8.7          | \$9.0          |
| Beaver                                | \$341.6          | 3,935         | \$146.4          | \$31.1         | \$33.2         |
| Butler                                | \$634.1          | 6,275         | \$255.2          | \$55.7         | \$57.1         |
| Greene                                | \$81.8           | 849           | \$25.5           | \$6.7          | \$6.6          |
| Indiana                               | \$174.4          | 2,324         | \$78.5           | \$15.9         | \$16.9         |
| Lawrence                              | \$156.8          | 1,725         | \$58.9           | \$13.6         | \$14.3         |
| Washington                            | \$700.7          | 8,181         | \$383.1          | \$69.6         | \$78.0         |
| <b>Pittsburgh and Its Countryside</b> | <b>\$8,568.5</b> | <b>83,203</b> | <b>\$4,299.8</b> | <b>\$833.1</b> | <b>\$888.2</b> |
| <b>Percent Change</b>                 | <b>24.3%</b>     | <b>8.6%</b>   | <b>12.6%</b>     | <b>14.9%</b>   | <b>10.7%</b>   |
| County, 2021                          |                  |               |                  |                |                |
| Allegheny                             | \$4,969.8        | 53,596        | \$2,924.2        | \$537.2        | \$598.2        |
| Armstrong                             | \$95.5           | 1,164         | \$32.6           | \$8.3          | \$8.7          |
| Beaver                                | \$301.6          | 3,645         | \$132.1          | \$28.9         | \$31.3         |
| Butler                                | \$538.9          | 5,928         | \$234.9          | \$50.9         | \$54.1         |
| Greene                                | \$75.0           | 815           | \$24.1           | \$6.5          | \$6.7          |
| Indiana                               | \$148.8          | 2,166         | \$70.1           | \$14.4         | \$15.7         |
| Lawrence                              | \$131.6          | 1,636         | \$53.2           | \$12.3         | \$13.2         |
| Washington                            | \$630.5          | 7,641         | \$349.0          | \$66.6         | \$74.7         |
| <b>Pittsburgh and Its Countryside</b> | <b>\$6,891.8</b> | <b>76,592</b> | <b>\$3,820.2</b> | <b>\$725.1</b> | <b>\$802.5</b> |

Source: Tourism Economics

# PITTSBURGH AND ITS COUNTRYSIDE

## Visitor Spending & Employment, 2016-2022

Employment directly supported by visitor spending in the Pittsburgh and Its Countryside region increased by more than 5,000 jobs in 2022, but remained 11 percentage points below the region's pre-pandemic level.

### Travel and Tourism Industry Timelines, Visitor Spending & Employment

Visitor spending in \$ millions, employment in units

|                                       | 2016             | 2017             | 2018             | 2019             | 2020             | 2021             | 2022             | % relative to 2019 |
|---------------------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|--------------------|
| Allegheny                             | \$5,950.8        | \$6,137.9        | \$6,379.6        | \$6,572.4        | \$3,603.0        | \$4,677.9        | \$6,039.3        | 91.9%              |
| Armstrong                             | \$88.5           | \$92.4           | \$93.2           | \$93.7           | \$68.3           | \$90.0           | \$100.4          | 107.1%             |
| Beaver                                | \$270.5          | \$283.4          | \$292.0          | \$311.8          | \$220.8          | \$284.5          | \$324.7          | 104.1%             |
| Butler                                | \$592.1          | \$593.7          | \$613.9          | \$632.0          | \$399.2          | \$507.7          | \$601.8          | 95.2%              |
| Greene                                | \$76.1           | \$78.5           | \$83.6           | \$78.7           | \$58.2           | \$70.7           | \$77.7           | 98.7%              |
| Indiana                               | \$155.4          | \$162.1          | \$165.7          | \$170.9          | \$111.2          | \$140.2          | \$165.6          | 96.9%              |
| Lawrence                              | \$120.2          | \$126.8          | \$130.0          | \$133.2          | \$96.6           | \$124.2          | \$149.1          | 111.9%             |
| Washington                            | \$662.6          | \$703.7          | \$737.3          | \$714.3          | \$460.9          | \$594.1          | \$665.9          | 93.2%              |
| <b>Pittsburgh and Its Countryside</b> | <b>\$7,916.2</b> | <b>\$8,178.6</b> | <b>\$8,495.3</b> | <b>\$8,707.1</b> | <b>\$5,018.1</b> | <b>\$6,489.3</b> | <b>\$8,124.3</b> | <b>93.3%</b>       |
| <b>Percent Change</b>                 | <b>-1.9%</b>     | <b>3.3%</b>      | <b>3.9%</b>      | <b>2.5%</b>      | <b>-42.4%</b>    | <b>29.3%</b>     | <b>25.2%</b>     |                    |

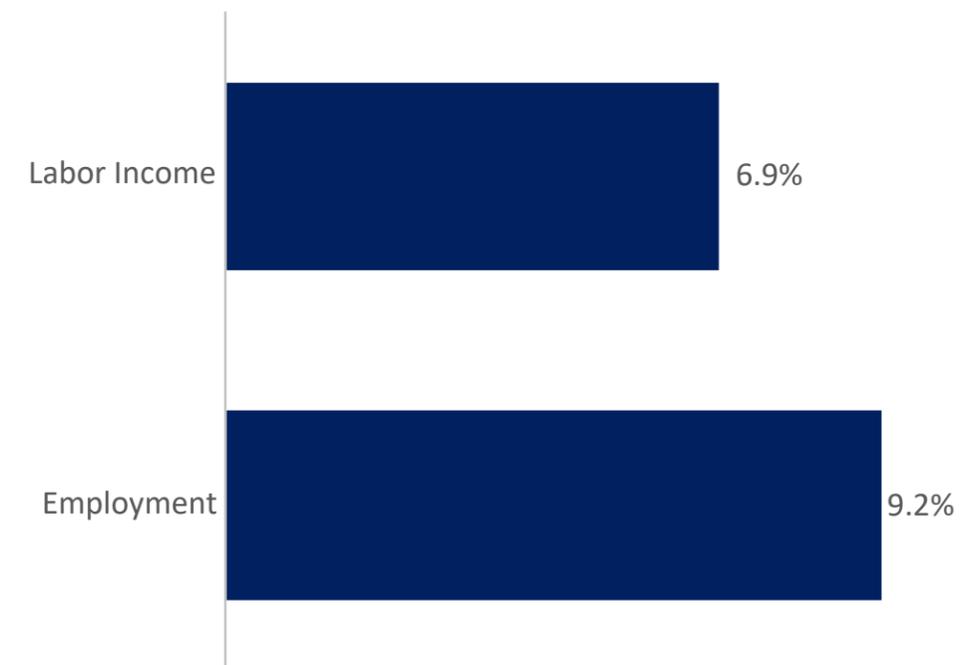
|                                       | 2016          | 2017          | 2018          | 2019          | 2020          | 2021          | 2022          | % relative to 2019 |
|---------------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|--------------------|
| Allegheny                             | 41,530        | 42,295        | 43,080        | 43,848        | 30,891        | 34,223        | 38,286        | 87.3%              |
| Armstrong                             | 594           | 608           | 621           | 621           | 535           | 635           | 690           | 111.1%             |
| Beaver                                | 2,111         | 2,124         | 2,157         | 2,235         | 1,874         | 2,125         | 2,317         | 103.7%             |
| Butler                                | 4,074         | 4,073         | 4,162         | 4,199         | 3,283         | 3,706         | 3,949         | 94.1%              |
| Greene                                | 483           | 486           | 505           | 509           | 450           | 503           | 526           | 103.3%             |
| Indiana                               | 1,421         | 1,443         | 1,484         | 1,506         | 1,161         | 1,297         | 1,412         | 93.8%              |
| Lawrence                              | 927           | 933           | 954           | 976           | 831           | 921           | 980           | 100.4%             |
| Washington                            | 5,856         | 5,876         | 6,000         | 5,974         | 4,448         | 4,915         | 5,359         | 89.7%              |
| <b>Pittsburgh and Its Countryside</b> | <b>56,995</b> | <b>57,837</b> | <b>58,964</b> | <b>59,868</b> | <b>43,472</b> | <b>48,326</b> | <b>53,519</b> | <b>89.4%</b>       |
| <b>Percent Change</b>                 | <b>1.1%</b>   | <b>1.5%</b>   | <b>1.9%</b>   | <b>1.5%</b>   | <b>-27.4%</b> | <b>11.2%</b>  | <b>10.7%</b>  |                    |

Source: Tourism Economics

The 53,520 jobs supported by visitor spending in the Pittsburgh and Its Countryside region represented 1 out of every 11 jobs in the region in 2022.

### Travel and Tourism Industry Share of Region Economy, 2022

Travel and tourism industry share of payroll employment and income



Source: BLS, Tourism Economics



# PENNSYLVANIA WILDS Visitor Spending

## Pennsylvania Wilds, Visitor Spending by Category

Amounts in \$ millions, 2022 % change

| County, 2022              | Lodging        | Food & beverages | Retail         | Recreation     | Transportation | Total            |
|---------------------------|----------------|------------------|----------------|----------------|----------------|------------------|
| Cameron                   | \$1.0          | \$2.4            | \$2.0          | \$3.4          | \$3.8          | \$12.6           |
| Clarion                   | \$15.5         | \$31.3           | \$22.5         | \$25.9         | \$39.2         | \$134.5          |
| Clearfield                | \$33.1         | \$72.1           | \$55.3         | \$57.9         | \$104.8        | \$323.2          |
| Clinton                   | \$12.7         | \$35.7           | \$25.0         | \$28.2         | \$54.4         | \$156.1          |
| Elk                       | \$9.7          | \$21.6           | \$16.8         | \$17.3         | \$23.6         | \$89.1           |
| Forest                    | \$6.9          | \$7.7            | \$6.8          | \$7.7          | \$9.5          | \$38.7           |
| Jefferson                 | \$7.7          | \$23.2           | \$17.4         | \$19.4         | \$42.6         | \$110.3          |
| Lycoming                  | \$48.9         | \$99.9           | \$64.4         | \$71.6         | \$131.1        | \$415.9          |
| McKean                    | \$14.9         | \$38.4           | \$26.9         | \$30.3         | \$62.1         | \$172.6          |
| Potter                    | \$7.7          | \$11.1           | \$8.8          | \$8.4          | \$14.6         | \$50.6           |
| Tioga                     | \$22.5         | \$48.8           | \$36.9         | \$41.5         | \$69.5         | \$219.2          |
| Warren                    | \$7.3          | \$38.3           | \$32.4         | \$32.1         | \$70.3         | \$180.5          |
| <b>Pennsylvania Wilds</b> | <b>\$188.2</b> | <b>\$430.5</b>   | <b>\$315.3</b> | <b>\$343.7</b> | <b>\$625.6</b> | <b>\$1,903.3</b> |
| <b>Percent Change</b>     | <b>13.1%</b>   | <b>13.2%</b>     | <b>3.5%</b>    | <b>21.6%</b>   | <b>14.0%</b>   | <b>13.1%</b>     |

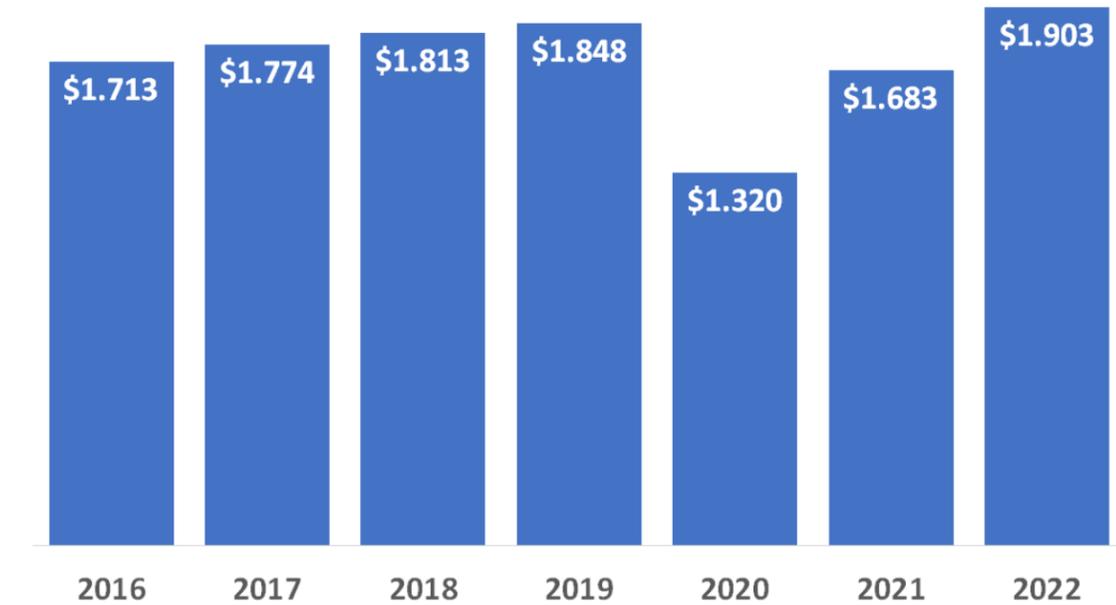
| County, 2021              | Lodging        | Food & beverages | Retail         | Recreation     | Transportation | Total            |
|---------------------------|----------------|------------------|----------------|----------------|----------------|------------------|
| Cameron                   | \$0.8          | \$2.2            | \$1.9          | \$2.7          | \$3.4          | \$11.0           |
| Clarion                   | \$11.2         | \$25.5           | \$22.1         | \$19.2         | \$31.9         | \$110.0          |
| Clearfield                | \$27.8         | \$62.5           | \$52.5         | \$46.7         | \$90.3         | \$279.8          |
| Clinton                   | \$11.7         | \$32.1           | \$23.5         | \$24.1         | \$48.1         | \$139.5          |
| Elk                       | \$8.8          | \$19.3           | \$15.8         | \$14.0         | \$21.1         | \$79.1           |
| Forest                    | \$6.4          | \$6.8            | \$6.8          | \$6.7          | \$8.4          | \$35.1           |
| Jefferson                 | \$7.3          | \$20.8           | \$16.8         | \$16.1         | \$40.2         | \$101.3          |
| Lycoming                  | \$44.3         | \$89.5           | \$64.3         | \$59.3         | \$111.3        | \$368.7          |
| McKean                    | \$13.6         | \$34.1           | \$26.7         | \$25.6         | \$55.6         | \$155.5          |
| Potter                    | \$6.9          | \$10.1           | \$8.6          | \$7.6          | \$13.5         | \$46.7           |
| Tioga                     | \$21.2         | \$43.7           | \$34.7         | \$34.3         | \$59.7         | \$193.6          |
| Warren                    | \$6.1          | \$33.8           | \$30.8         | \$26.4         | \$65.1         | \$162.2          |
| <b>Pennsylvania Wilds</b> | <b>\$166.3</b> | <b>\$380.4</b>   | <b>\$304.6</b> | <b>\$282.6</b> | <b>\$548.6</b> | <b>\$1,682.6</b> |

Lodging includes short-term rentals and other 2nd home spending Transportation includes both ground and air transportation

Sources: STR, County bed tax revenues, PA DOR, Tourism Economics

## Pennsylvania Wilds - Visitor Spending, 2016-2022

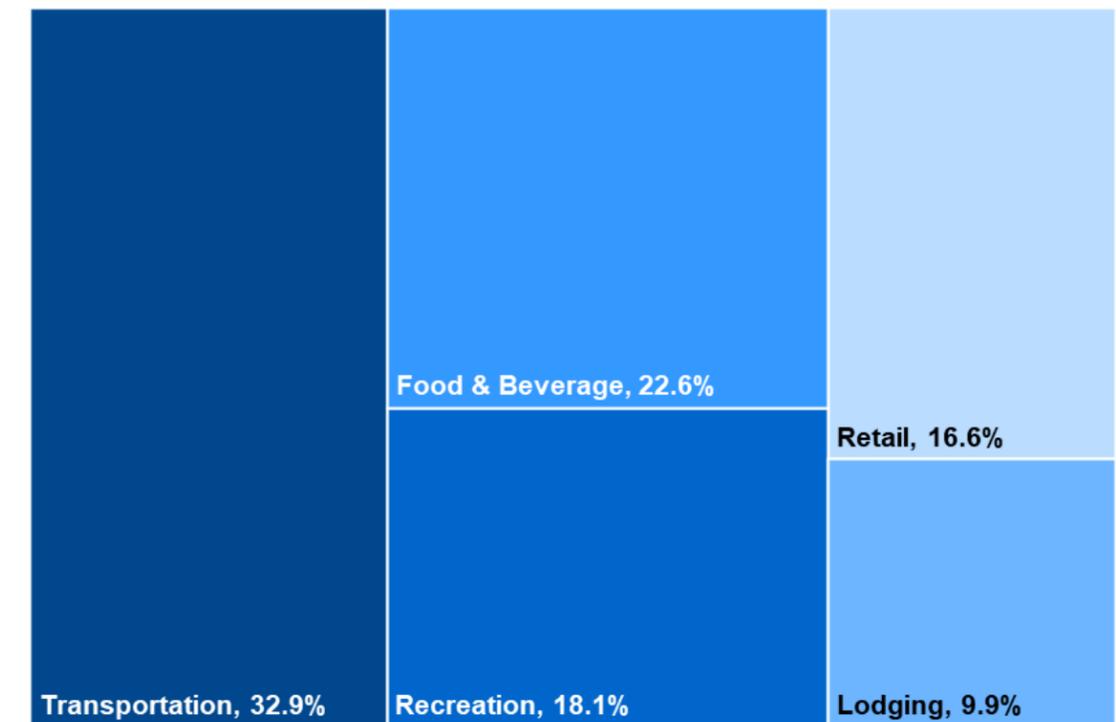
Amounts in \$ billions



Source: Tourism Economics

## Visitor Spending by Category, 2022

Percent of region total



Source: Tourism Economics

# PENNSYLVANIA WILDS

## Economic Impacts

### Tourism Satellite Account

\$ millions, 2021-2022 percent change

| County, 2022              | Visitor Spending | Government   | Investment/ PCE | Total Tourism Demand |
|---------------------------|------------------|--------------|-----------------|----------------------|
| Cameron                   | \$12.6           | \$0.0        | \$0.9           | \$13.5               |
| Clarion                   | \$134.5          | \$0.5        | \$7.0           | \$142.0              |
| Clearfield                | \$323.2          | \$1.5        | \$16.3          | \$341.1              |
| Clinton                   | \$156.1          | \$0.5        | \$8.2           | \$164.8              |
| Elk                       | \$89.1           | \$0.4        | \$4.8           | \$94.4               |
| Forest                    | \$38.7           | \$0.2        | \$2.8           | \$41.7               |
| Jefferson                 | \$110.3          | \$0.4        | \$5.8           | \$116.5              |
| Lycoming                  | \$415.9          | \$2.1        | \$20.6          | \$438.7              |
| McKean                    | \$172.6          | \$0.6        | \$8.8           | \$182.0              |
| Potter                    | \$50.6           | \$0.3        | \$3.6           | \$54.5               |
| Tioga                     | \$219.2          | \$1.1        | \$11.3          | \$231.6              |
| Warren                    | \$180.5          | \$0.5        | \$9.5           | \$190.5              |
| <b>Pennsylvania Wilds</b> | <b>\$1,903.3</b> | <b>\$8.2</b> | <b>\$99.7</b>   | <b>\$2,011.3</b>     |
| <b>Percent Change</b>     | <b>13.1%</b>     | <b>20.7%</b> | <b>-2.4%</b>    | <b>12.3%</b>         |

| County, 2021              | Visitor Spending | Government   | Investment/ PCE | Total Tourism Demand |
|---------------------------|------------------|--------------|-----------------|----------------------|
| Cameron                   | \$11.0           | \$0.0        | \$0.9           | \$12.0               |
| Clarion                   | \$110.0          | \$0.2        | \$6.6           | \$116.8              |
| Clearfield                | \$279.8          | \$1.0        | \$16.4          | \$297.3              |
| Clinton                   | \$139.5          | \$0.5        | \$8.5           | \$148.5              |
| Elk                       | \$79.1           | \$0.4        | \$4.9           | \$84.5               |
| Forest                    | \$35.1           | \$0.1        | \$3.0           | \$38.3               |
| Jefferson                 | \$101.3          | \$0.4        | \$6.2           | \$107.9              |
| Lycoming                  | \$368.7          | \$1.7        | \$21.2          | \$391.6              |
| McKean                    | \$155.5          | \$0.6        | \$9.2           | \$165.3              |
| Potter                    | \$46.7           | \$0.3        | \$3.7           | \$50.7               |
| Tioga                     | \$193.6          | \$0.9        | \$11.6          | \$206.1              |
| Warren                    | \$162.2          | \$0.4        | \$9.9           | \$172.6              |
| <b>Pennsylvania Wilds</b> | <b>\$1,682.6</b> | <b>\$6.8</b> | <b>\$102.2</b>  | <b>\$1,791.7</b>     |

Source: Tourism Economics

# PENNSYLVANIA WILDS

## Economic Impacts

### Tourism INDUSTRY(direct) Impacts

\$ millions, except employment (in units), 2021-2022 percent change

| County, 2022              | Visitor          |               | Taxes          |               |               |
|---------------------------|------------------|---------------|----------------|---------------|---------------|
|                           | Spend            | Employment    | Labor Income   | State/Local   | Federal       |
| Cameron                   | \$12.6           | 84            | \$1.7          | \$0.5         | \$0.5         |
| Clarion                   | \$134.5          | 1,170         | \$31.8         | \$6.6         | \$7.5         |
| Clearfield                | \$323.2          | 1,813         | \$60.8         | \$15.0        | \$15.6        |
| Clinton                   | \$156.1          | 1,018         | \$29.8         | \$7.1         | \$7.6         |
| Elk                       | \$89.1           | 632           | \$17.0         | \$4.2         | \$4.3         |
| Forest                    | \$38.7           | 182           | \$5.2          | \$1.6         | \$1.6         |
| Jefferson                 | \$110.3          | 803           | \$22.9         | \$5.2         | \$5.7         |
| Lycoming                  | \$415.9          | 2,877         | \$97.0         | \$20.9        | \$23.0        |
| McKean                    | \$172.6          | 1,238         | \$37.7         | \$8.2         | \$9.1         |
| Potter                    | \$50.6           | 300           | \$7.6          | \$2.3         | \$2.2         |
| Tioga                     | \$219.2          | 1,749         | \$53.4         | \$11.2        | \$12.4        |
| Warren                    | \$180.5          | 1,206         | \$34.5         | \$8.1         | \$8.8         |
| <b>Pennsylvania Wilds</b> | <b>\$1,903.3</b> | <b>13,071</b> | <b>\$399.4</b> | <b>\$90.8</b> | <b>\$98.3</b> |
| <b>Percent Change</b>     | <b>13.1%</b>     | <b>5.1%</b>   | <b>8.0%</b>    | <b>6.4%</b>   | <b>2.2%</b>   |

| County, 2021              | Visitor          |               | Taxes          |               |               |
|---------------------------|------------------|---------------|----------------|---------------|---------------|
|                           | Spend            | Employment    | Labor Income   | State/Local   | Federal       |
| Cameron                   | \$11.0           | 80            | \$1.7          | \$0.5         | \$0.5         |
| Clarion                   | \$110.0          | 1,095         | \$29.4         | \$5.8         | \$7.1         |
| Clearfield                | \$279.8          | 1,744         | \$57.6         | \$13.8        | \$15.4        |
| Clinton                   | \$139.5          | 1,010         | \$28.9         | \$6.9         | \$7.7         |
| Elk                       | \$79.1           | 601           | \$15.7         | \$4.0         | \$4.3         |
| Forest                    | \$35.1           | 170           | \$4.9          | \$1.5         | \$1.6         |
| Jefferson                 | \$101.3          | 772           | \$22.2         | \$5.1         | \$5.8         |
| Lycoming                  | \$368.7          | 2,723         | \$86.7         | \$19.4        | \$22.0        |
| McKean                    | \$155.5          | 1,169         | \$35.0         | \$7.9         | \$9.0         |
| Potter                    | \$46.7           | 293           | \$7.4          | \$2.2         | \$2.2         |
| Tioga                     | \$193.6          | 1,623         | \$47.6         | \$10.4        | \$11.9        |
| Warren                    | \$162.2          | 1,152         | \$33.0         | \$7.8         | \$8.8         |
| <b>Pennsylvania Wilds</b> | <b>\$1,682.6</b> | <b>12,434</b> | <b>\$370.0</b> | <b>\$85.3</b> | <b>\$96.2</b> |

Source: Tourism Economics

### Travel and Tourism ECONOMY (total) Impacts

\$ millions, except employment (in units), 2021-2022 percent change

| County, 2022              | Visitor          |               | Taxes          |                |                |
|---------------------------|------------------|---------------|----------------|----------------|----------------|
|                           | Spend            | Employment    | Labor Income   | State/Local    | Federal        |
| Cameron                   | \$13.5           | 137           | \$3.0          | \$1.0          | \$0.9          |
| Clarion                   | \$142.0          | 1,803         | \$60.2         | \$12.6         | \$13.4         |
| Clearfield                | \$341.1          | 2,909         | \$112.9        | \$28.2         | \$28.1         |
| Clinton                   | \$164.8          | 1,624         | \$55.1         | \$13.5         | \$13.7         |
| Elk                       | \$94.4           | 1,005         | \$30.9         | \$7.8          | \$7.8          |
| Forest                    | \$41.7           | 276           | \$9.3          | \$3.0          | \$2.8          |
| Jefferson                 | \$116.5          | 1,342         | \$44.9         | \$9.9          | \$10.2         |
| Lycoming                  | \$438.7          | 4,452         | \$178.9        | \$39.5         | \$41.2         |
| McKean                    | \$182.0          | 1,868         | \$69.0         | \$15.7         | \$16.4         |
| Potter                    | \$54.5           | 464           | \$13.6         | \$4.2          | \$3.9          |
| Tioga                     | \$231.6          | 2,568         | \$94.2         | \$21.1         | \$22.3         |
| Warren                    | \$190.5          | 1,862         | \$65.3         | \$15.5         | \$15.8         |
| <b>Pennsylvania Wilds</b> | <b>\$2,011.3</b> | <b>20,311</b> | <b>\$737.4</b> | <b>\$172.1</b> | <b>\$176.6</b> |
| <b>Percent Change</b>     | <b>12.3%</b>     | <b>4.9%</b>   | <b>6.4%</b>    | <b>5.4%</b>    | <b>2.2%</b>    |

| County, 2021              | Visitor          |               | Taxes          |                |                |
|---------------------------|------------------|---------------|----------------|----------------|----------------|
|                           | Spend            | Employment    | Labor Income   | State/Local    | Federal        |
| Cameron                   | \$12.0           | 131           | \$2.9          | \$0.9          | \$0.9          |
| Clarion                   | \$116.8          | 1,704         | \$56.7         | \$11.3         | \$12.8         |
| Clearfield                | \$297.3          | 2,795         | \$108.1        | \$26.4         | \$27.6         |
| Clinton                   | \$148.5          | 1,589         | \$54.3         | \$13.2         | \$13.8         |
| Elk                       | \$84.5           | 957           | \$29.1         | \$7.5          | \$7.6          |
| Forest                    | \$38.3           | 261           | \$8.9          | \$2.9          | \$2.8          |
| Jefferson                 | \$107.9          | 1,291         | \$43.2         | \$9.8          | \$10.4         |
| Lycoming                  | \$391.6          | 4,234         | \$163.0        | \$37.0         | \$39.5         |
| McKean                    | \$165.3          | 1,773         | \$65.0         | \$15.2         | \$16.2         |
| Potter                    | \$50.7           | 452           | \$13.4         | \$4.2          | \$4.0          |
| Tioga                     | \$206.1          | 2,402         | \$86.1         | \$19.8         | \$21.3         |
| Warren                    | \$172.6          | 1,782         | \$62.4         | \$15.1         | \$15.9         |
| <b>Pennsylvania Wilds</b> | <b>\$1,791.7</b> | <b>19,369</b> | <b>\$693.1</b> | <b>\$163.3</b> | <b>\$172.8</b> |

Source: Tourism Economics

# PENNSYLVANIA WILDS

## Visitor Spending & Employment, 2016-2022

Travel-related employment in the Pennsylvania Wilds region in 2022 was just 200 below the region's pre-pandemic level.

### Travel and Tourism Industry Timelines, Visitor Spending & Employment

Visitor spending in \$ millions, employment in units

|                           | 2016             | 2017             | 2018             | 2019             | 2020             | 2021             | 2022             | % relative to 2019 |
|---------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|--------------------|
| Cameron                   | \$10.1           | \$10.1           | \$10.0           | \$10.4           | \$8.8            | \$11.0           | \$12.6           | 120.8%             |
| Clarion                   | \$118.9          | \$125.5          | \$123.3          | \$126.0          | \$93.9           | \$110.0          | \$134.5          | 106.8%             |
| Clearfield                | \$266.2          | \$277.3          | \$292.7          | \$293.9          | \$213.5          | \$279.8          | \$323.2          | 110.0%             |
| Clinton                   | \$140.6          | \$149.9          | \$152.4          | \$160.0          | \$104.5          | \$139.5          | \$156.1          | 97.6%              |
| Elk                       | \$78.0           | \$80.2           | \$79.2           | \$82.5           | \$62.1           | \$79.1           | \$89.1           | 108.1%             |
| Forest                    | \$26.3           | \$27.2           | \$27.1           | \$26.1           | \$29.8           | \$35.1           | \$38.7           | 148.0%             |
| Jefferson                 | \$116.0          | \$124.1          | \$121.9          | \$120.8          | \$81.8           | \$101.3          | \$110.3          | 91.3%              |
| Lycoming                  | \$370.6          | \$379.3          | \$392.1          | \$408.9          | \$282.2          | \$368.7          | \$415.9          | 101.7%             |
| McKean                    | \$172.9          | \$180.0          | \$183.4          | \$182.6          | \$121.0          | \$155.5          | \$172.6          | 94.5%              |
| Potter                    | \$37.7           | \$40.2           | \$38.9           | \$39.4           | \$38.8           | \$46.7           | \$50.6           | 128.6%             |
| Tioga                     | \$193.3          | \$193.5          | \$201.4          | \$203.6          | \$158.9          | \$193.6          | \$219.2          | 107.7%             |
| Warren                    | \$182.3          | \$186.8          | \$190.2          | \$194.1          | \$124.7          | \$162.2          | \$180.5          | 92.9%              |
| <b>Pennsylvania Wilds</b> | <b>\$1,712.8</b> | <b>\$1,774.1</b> | <b>\$1,812.7</b> | <b>\$1,848.2</b> | <b>\$1,320.0</b> | <b>\$1,682.6</b> | <b>\$1,903.3</b> | <b>103.0%</b>      |
| <b>Percent Change</b>     | <b>-1.3%</b>     | <b>3.6%</b>      | <b>2.2%</b>      | <b>2.0%</b>      | <b>-28.6%</b>    | <b>27.5%</b>     | <b>13.1%</b>     |                    |

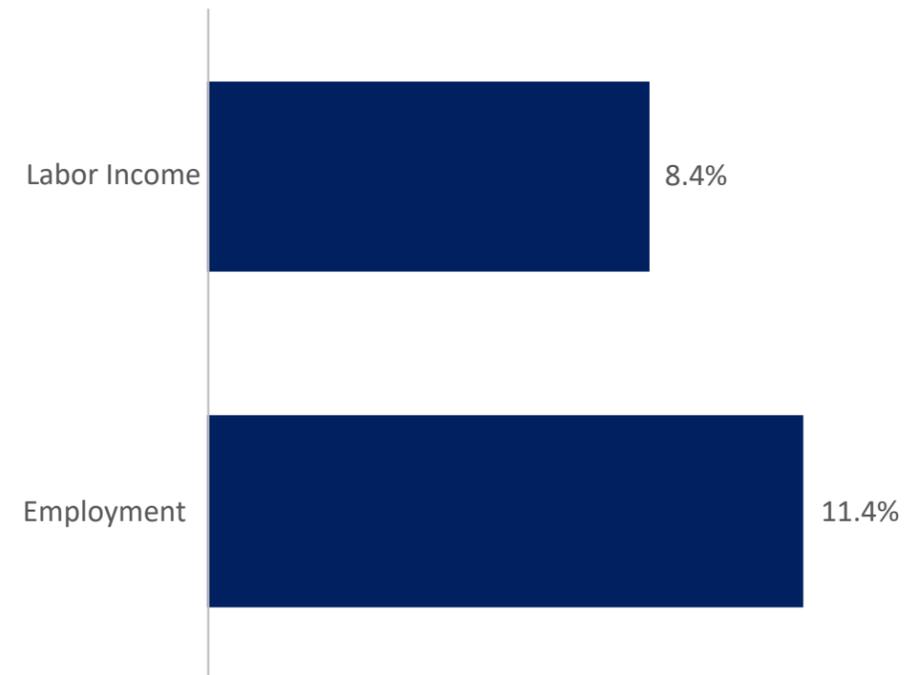
|                           | 2016          | 2017          | 2018          | 2019          | 2020          | 2021          | 2022          | % relative to 2019 |
|---------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|--------------------|
| Cameron                   | 77            | 77            | 78            | 80            | 75            | 80            | 84            | 104.2%             |
| Clarion                   | 1,110         | 1,114         | 1,127         | 1,157         | 981           | 1,095         | 1,170         | 101.1%             |
| Clearfield                | 1,812         | 1,836         | 1,869         | 1,897         | 1,567         | 1,744         | 1,813         | 95.6%              |
| Clinton                   | 1,069         | 1,073         | 1,090         | 1,128         | 929           | 1,010         | 1,018         | 90.3%              |
| Elk                       | 591           | 596           | 601           | 622           | 535           | 601           | 632           | 101.5%             |
| Forest                    | 139           | 139           | 140           | 142           | 148           | 170           | 182           | 128.6%             |
| Jefferson                 | 816           | 828           | 839           | 846           | 700           | 772           | 803           | 95.0%              |
| Lycoming                  | 2,930         | 2,951         | 2,989         | 3,032         | 2,430         | 2,723         | 2,877         | 94.9%              |
| McKean                    | 1,166         | 1,197         | 1,203         | 1,216         | 1,026         | 1,169         | 1,238         | 101.8%             |
| Potter                    | 245           | 253           | 257           | 257           | 254           | 293           | 300           | 116.5%             |
| Tioga                     | 1,623         | 1,629         | 1,640         | 1,680         | 1,449         | 1,623         | 1,749         | 104.1%             |
| Warren                    | 1,167         | 1,177         | 1,189         | 1,212         | 1,023         | 1,152         | 1,206         | 99.5%              |
| <b>Pennsylvania Wilds</b> | <b>12,745</b> | <b>12,872</b> | <b>13,021</b> | <b>13,268</b> | <b>11,118</b> | <b>12,434</b> | <b>13,071</b> | <b>98.5%</b>       |
| <b>Percent Change</b>     | <b>0.9%</b>   | <b>1.0%</b>   | <b>1.2%</b>   | <b>1.9%</b>   | <b>-16.2%</b> | <b>11.8%</b>  | <b>5.1%</b>   |                    |

Source: Tourism Economics

The 13,070 jobs supported by visitor spending in the Pennsylvania Wilds region represented 1 out of every 9 jobs in the region in 2022.

### Travel and Tourism Industry Share of Region Economy, 2022

Travel and tourism industry share of payroll employment and income



Source: BLS, Tourism Economics



# VALLEYS OF THE SUSQUEHANNA

## Visitor Spending

Visitor spending rose 15% in the Valleys of the Susquehanna region in 2022 to surpass the region's pre-pandemic level by nearly \$50 million.

### Valleys of the Susquehanna, Visitor Spending by Category

Amounts in \$ millions, 2021-2022 % change

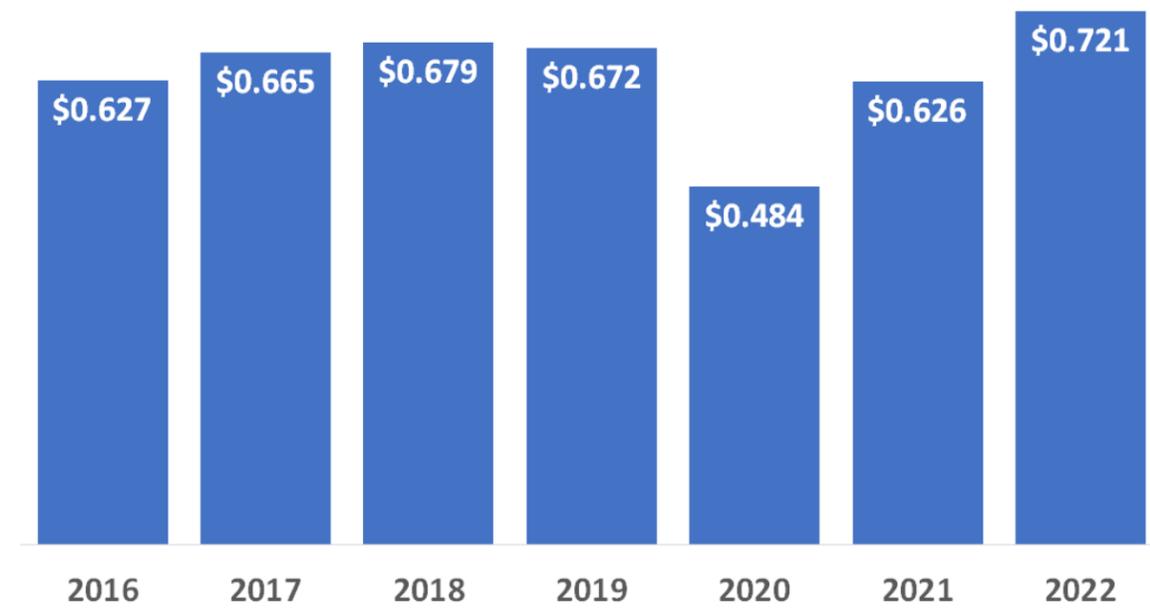
| County, 2022                      | Lodging       | Food & beverages | Retail         | Recreation     | Transportation | Total          |
|-----------------------------------|---------------|------------------|----------------|----------------|----------------|----------------|
| Columbia                          | \$22.5        | \$45.6           | \$31.3         | \$31.8         | \$54.5         | \$185.7        |
| Montour                           | \$16.0        | \$24.7           | \$17.6         | \$21.4         | \$27.9         | \$107.6        |
| Northumberland                    | \$4.5         | \$27.3           | \$17.9         | \$37.7         | \$48.5         | \$136.0        |
| Snyder                            | \$13.6        | \$28.7           | \$21.7         | \$21.6         | \$30.0         | \$115.7        |
| Union                             | \$27.1        | \$45.5           | \$31.2         | \$23.5         | \$48.2         | \$175.6        |
| <b>Valleys of the Susquehanna</b> | <b>\$83.8</b> | <b>\$171.9</b>   | <b>\$119.7</b> | <b>\$136.0</b> | <b>\$209.3</b> | <b>\$720.6</b> |
| <b>Percent Change</b>             | <b>14.3%</b>  | <b>12.3%</b>     | <b>5.6%</b>    | <b>19.9%</b>   | <b>21.4%</b>   | <b>15.2%</b>   |
| County, 2021                      |               |                  |                |                |                |                |
| Columbia                          | \$20.1        | \$41.2           | \$30.0         | \$26.4         | \$45.0         | \$162.8        |
| Montour                           | \$15.6        | \$23.6           | \$17.5         | \$19.0         | \$25.7         | \$101.5        |
| Northumberland                    | \$3.3         | \$23.0           | \$15.9         | \$29.5         | \$39.6         | \$111.3        |
| Snyder                            | \$12.4        | \$26.0           | \$21.5         | \$18.9         | \$25.7         | \$104.5        |
| Union                             | \$21.7        | \$39.3           | \$28.4         | \$19.5         | \$36.4         | \$145.4        |
| <b>Valleys of the Susquehanna</b> | <b>\$73.3</b> | <b>\$153.0</b>   | <b>\$113.4</b> | <b>\$113.4</b> | <b>\$172.4</b> | <b>\$625.5</b> |

Lodging includes short-term rentals and other 2nd home spending  
 Transportation includes both ground and air transportation

Sources: STR, County bed tax revenues, PA DOR, Tourism Economics

### Valleys of the Susquehanna - Visitor Spending, 2016-2022

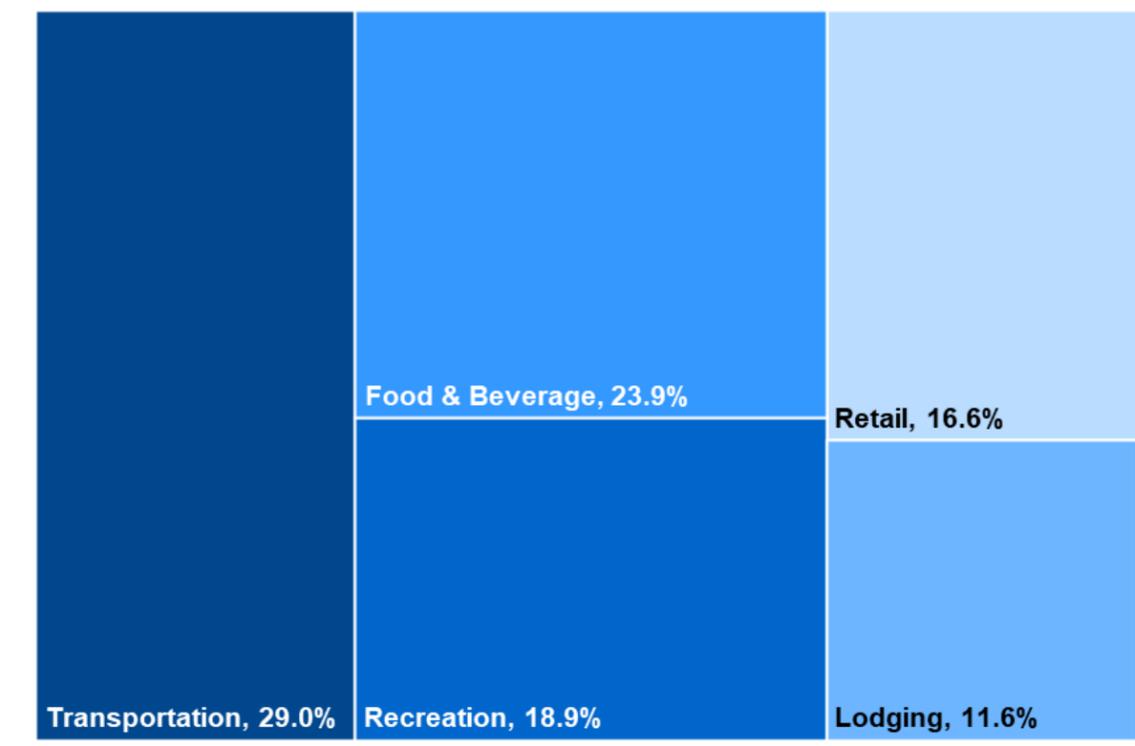
Amounts in \$ billions



Source: Tourism Economics

### Visitor Spending by Category, 2022

Percent of region total



Source: Tourism Economics

# VALLEYS OF THE SUSQUEHANNA

## Economic Impacts

### Tourism Satellite Account

\$ millions, 2021-2022 percent change

| County, 2022                      | Visitor Spending | Government   | Investment/<br>PCE | Total Tourism Demand |
|-----------------------------------|------------------|--------------|--------------------|----------------------|
| Columbia                          | \$185.7          | \$0.7        | \$9.2              | \$195.6              |
| Montour                           | \$107.6          | \$0.5        | \$5.2              | \$113.3              |
| Northumberland                    | \$136.0          | \$0.3        | \$6.7              | \$143.0              |
| Snyder                            | \$115.7          | \$0.5        | \$5.7              | \$121.8              |
| Union                             | \$175.6          | \$0.9        | \$8.8              | \$185.2              |
| <b>Valleys of the Susquehanna</b> | <b>\$720.6</b>   | <b>\$2.9</b> | <b>\$35.5</b>      | <b>\$759.0</b>       |
| <b>Percent Change</b>             | <b>15.2%</b>     | <b>14.8%</b> | <b>-1.0%</b>       | <b>14.3%</b>         |

| County, 2021                      | Visitor Spending | Government   | Investment/<br>PCE | Total Tourism Demand |
|-----------------------------------|------------------|--------------|--------------------|----------------------|
| Columbia                          | \$162.8          | \$0.7        | \$9.4              | \$172.9              |
| Montour                           | \$101.5          | \$0.5        | \$5.7              | \$107.7              |
| Northumberland                    | \$111.3          | \$0.2        | \$6.4              | \$117.9              |
| Snyder                            | \$104.5          | \$0.4        | \$6.0              | \$110.9              |
| Union                             | \$145.4          | \$0.8        | \$8.5              | \$154.6              |
| <b>Valleys of the Susquehanna</b> | <b>\$625.5</b>   | <b>\$2.6</b> | <b>\$35.8</b>      | <b>\$663.9</b>       |

Source: Tourism Economics

### Travel and Tourism INDUSTRY (direct) Impacts

\$ millions, except employment (in units), 2021-2022 percent change

| County, 2022                      | Visitor        |              |                | Taxes         |               |
|-----------------------------------|----------------|--------------|----------------|---------------|---------------|
|                                   | Spend          | Employment   | Labor Income   | State/Local   | Federal       |
| Columbia                          | \$185.7        | 1,320        | \$38.1         | \$8.7         | \$9.5         |
| Montour                           | \$107.6        | 874          | \$26.2         | \$5.5         | \$6.1         |
| Northumberland                    | \$136.0        | 1,066        | \$35.7         | \$6.7         | \$8.1         |
| Snyder                            | \$115.7        | 810          | \$21.4         | \$5.2         | \$5.5         |
| Union                             | \$175.6        | 1,150        | \$37.5         | \$8.6         | \$9.2         |
| <b>Valleys of the Susquehanna</b> | <b>\$720.6</b> | <b>5,219</b> | <b>\$158.9</b> | <b>\$34.8</b> | <b>\$38.4</b> |
| <b>Percent Change</b>             | <b>15.2%</b>   | <b>6.2%</b>  | <b>9.7%</b>    | <b>7.5%</b>   | <b>3.9%</b>   |

| County, 2021                      | Visitor Spend  | Employment   | Labor Income   | Taxes State/Local | Taxes Federal |
|-----------------------------------|----------------|--------------|----------------|-------------------|---------------|
| Columbia                          | \$162.8        | 1,212        | \$34.0         | \$8.1             | \$9.0         |
| Montour                           | \$101.5        | 844          | \$23.9         | \$5.4             | \$6.1         |
| Northumberland                    | \$111.3        | 978          | \$31.3         | \$6.0             | \$7.5         |
| Snyder                            | \$104.5        | 760          | \$19.7         | \$5.0             | \$5.4         |
| Union                             | \$145.4        | 1,120        | \$36.0         | \$7.9             | \$9.0         |
| <b>Valleys of the Susquehanna</b> | <b>\$625.5</b> | <b>4,915</b> | <b>\$144.9</b> | <b>\$32.4</b>     | <b>\$37.0</b> |

### Travel and Tourism ECONOMY (total) Impacts

\$ millions, except employment (in units), 2021-2022 percent change

| County, 2022                      | Visitor        |              |                | Taxes         |               |
|-----------------------------------|----------------|--------------|----------------|---------------|---------------|
|                                   | Spend          | Employment   | Labor Income   | State/Local   | Federal       |
| Columbia                          | \$195.6        | 2,086        | \$73.0         | \$16.6        | \$17.0        |
| Montour                           | \$113.3        | 1,290        | \$52.1         | \$10.4        | \$11.0        |
| Northumberland                    | \$143.0        | 1,911        | \$64.6         | \$13.1        | \$14.5        |
| Snyder                            | \$121.8        | 1,275        | \$40.9         | \$10.0        | \$10.0        |
| Union                             | \$185.2        | 1,832        | \$74.6         | \$16.2        | \$16.5        |
| <b>Valleys of the Susquehanna</b> | <b>\$759.0</b> | <b>8,393</b> | <b>\$305.3</b> | <b>\$66.2</b> | <b>\$68.9</b> |
| <b>Percent Change</b>             | <b>14.3%</b>   | <b>5.4%</b>  | <b>7.7%</b>    | <b>6.8%</b>   | <b>3.9%</b>   |

| County, 2021                      | Visitor Spend  | Employment   | Labor Income   | Taxes State/Local | Taxes Federal |
|-----------------------------------|----------------|--------------|----------------|-------------------|---------------|
| Columbia                          | \$172.9        | 1,948        | \$66.2         | \$15.5            | \$16.2        |
| Montour                           | \$107.7        | 1,245        | \$48.3         | \$10.2            | \$10.9        |
| Northumberland                    | \$117.9        | 1,782        | \$58.3         | \$11.7            | \$13.4        |
| Snyder                            | \$110.9        | 1,212        | \$38.6         | \$9.6             | \$9.8         |
| Union                             | \$154.6        | 1,776        | \$71.9         | \$15.0            | \$16.1        |
| <b>Valleys of the Susquehanna</b> | <b>\$663.9</b> | <b>7,963</b> | <b>\$283.3</b> | <b>\$62.0</b>     | <b>\$66.3</b> |

Source: Tourism Economics

# VALLEYS OF THE SUSQUEHANNA

## Visitor Spending & Employment, 2016-2022

Employment directly supported by visitor spending in the Valleys of the Susquehanna region increased by 300 jobs in 2022, a 6% increase, but the employment count remained 7% below that of 2019.

### Travel and Tourism Industry Timelines, Visitor Spending & Employment

Visitor spending in \$ millions, employment in units

|                                   | 2016           | 2017           | 2018           | 2019           | 2020           | 2021           | 2022           | % relative to 2019 |
|-----------------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|--------------------|
| Columbia                          | \$154.2        | \$167.7        | \$178.3        | \$171.0        | \$125.9        | \$162.8        | \$185.7        | 108.6%             |
| Montour                           | \$94.4         | \$97.9         | \$100.5        | \$95.6         | \$77.5         | \$101.5        | \$107.6        | 112.5%             |
| Northumberland                    | \$133.1        | \$138.1        | \$137.9        | \$140.5        | \$86.5         | \$111.3        | \$136.0        | 96.8%              |
| Snyder                            | \$103.5        | \$111.6        | \$111.4        | \$110.9        | \$81.0         | \$104.5        | \$115.7        | 104.4%             |
| Union                             | \$142.0        | \$150.0        | \$151.0        | \$153.6        | \$112.6        | \$145.4        | \$175.6        | 114.3%             |
| <b>Valleys of the Susquehanna</b> | <b>\$627.2</b> | <b>\$665.4</b> | <b>\$679.1</b> | <b>\$671.5</b> | <b>\$483.6</b> | <b>\$625.5</b> | <b>\$720.6</b> | <b>107.3%</b>      |
| <b>Percent Change</b>             | <b>1.2%</b>    | <b>6.1%</b>    | <b>2.0%</b>    | <b>-1.1%</b>   | <b>-28.0%</b>  | <b>29.3%</b>   | <b>15.2%</b>   |                    |

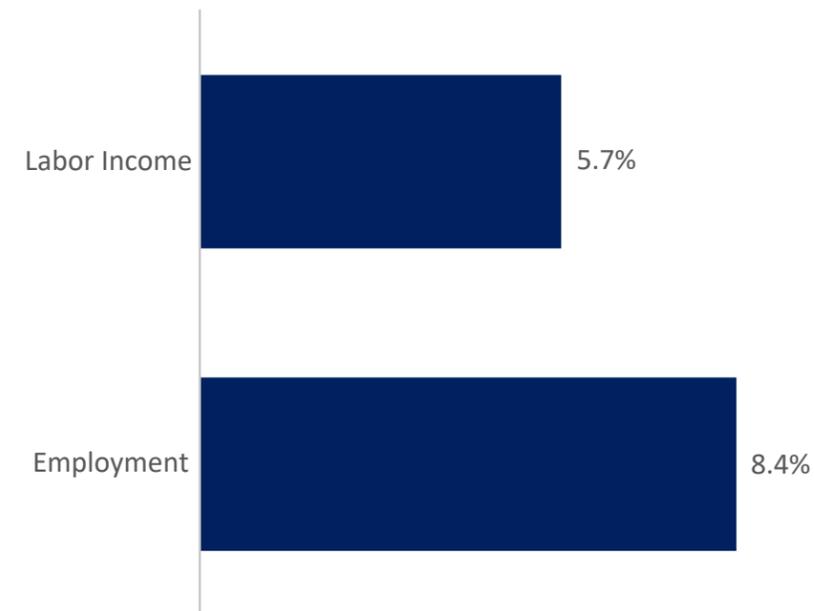
|                                   | 2016         | 2017         | 2018         | 2019         | 2020          | 2021         | 2022         | % relative to 2019 |
|-----------------------------------|--------------|--------------|--------------|--------------|---------------|--------------|--------------|--------------------|
| Columbia                          | 1,302        | 1,339        | 1,369        | 1,364        | 1,079         | 1,212        | 1,320        | 96.7%              |
| Montour                           | 926          | 937          | 965          | 973          | 808           | 844          | 874          | 89.9%              |
| Northumberland                    | 1,107        | 1,128        | 1,129        | 1,152        | 849           | 978          | 1,066        | 92.5%              |
| Snyder                            | 776          | 790          | 803          | 811          | 672           | 760          | 810          | 99.8%              |
| Union                             | 1,243        | 1,271        | 1,293        | 1,314        | 1,035         | 1,120        | 1,150        | 87.6%              |
| <b>Valleys of the Susquehanna</b> | <b>5,353</b> | <b>5,465</b> | <b>5,558</b> | <b>5,614</b> | <b>4,443</b>  | <b>4,915</b> | <b>5,219</b> | <b>93.0%</b>       |
| <b>Percent Change</b>             | <b>1.5%</b>  | <b>2.1%</b>  | <b>1.7%</b>  | <b>1.0%</b>  | <b>-20.9%</b> | <b>10.6%</b> | <b>6.2%</b>  |                    |

Source: Tourism Economics

The 5,220 jobs supported by visitor spending in the Valleys of the Susquehanna region represented 1 out of every 12 jobs in the region in 2022.

### Travel and Tourism Industry Share of Region Economy, 2022

Travel and tourism industry share of payroll employment and income



Source: BLS, Tourism Economics



# THE ALLEGHENIES

## Visitor Spending

Visitor spending rose by nearly 17% in The Alleghenies region in 2022, with the total just 1% below the region's pre-pandemic level.

### The Alleghenies, Visitor Spending by Category

Amounts in \$ millions, 2021-2022 % change

| County, 2022           | Lodging        | Food & beverages | Retail         | Recreation     | Transportation | Total            |
|------------------------|----------------|------------------|----------------|----------------|----------------|------------------|
| Bedford                | \$40.8         | \$63.8           | \$44.3         | \$52.1         | \$93.1         | \$294.1          |
| Blair                  | \$38.7         | \$82.8           | \$67.5         | \$55.7         | \$126.3        | \$371.0          |
| Cambria                | \$21.8         | \$65.0           | \$43.9         | \$53.2         | \$104.9        | \$288.8          |
| Centre                 | \$126.9        | \$190.5          | \$132.4        | \$134.3        | \$213.8        | \$797.9          |
| Fulton                 | \$2.2          | \$5.8            | \$4.9          | \$4.4          | \$8.9          | \$26.3           |
| Huntingdon             | \$16.5         | \$44.8           | \$30.1         | \$39.4         | \$66.8         | \$197.5          |
| Juniata                | \$2.2          | \$9.9            | \$7.1          | \$7.3          | \$16.3         | \$42.7           |
| Mifflin                | \$8.0          | \$21.7           | \$13.5         | \$13.1         | \$29.0         | \$85.4           |
| <b>The Alleghenies</b> | <b>\$257.0</b> | <b>\$484.3</b>   | <b>\$343.7</b> | <b>\$359.6</b> | <b>\$659.1</b> | <b>\$2,103.7</b> |
| <b>Percent Change</b>  | <b>22.2%</b>   | <b>16.5%</b>     | <b>7.1%</b>    | <b>26.1%</b>   | <b>15.6%</b>   | <b>16.7%</b>     |

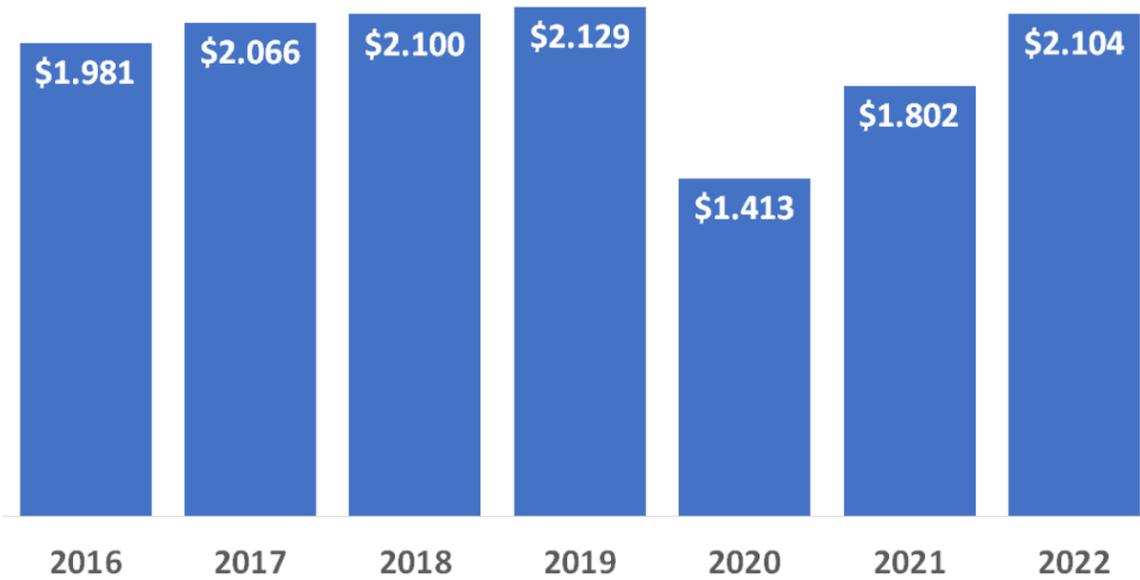
| County, 2021           | Lodging        | Food & beverages | Retail         | Recreation     | Transportation | Total            |
|------------------------|----------------|------------------|----------------|----------------|----------------|------------------|
| Bedford                | \$35.4         | \$56.4           | \$42.2         | \$42.8         | \$81.8         | \$258.6          |
| Blair                  | \$33.2         | \$72.9           | \$64.6         | \$44.4         | \$111.2        | \$326.4          |
| Cambria                | \$18.5         | \$56.7           | \$41.3         | \$43.4         | \$91.3         | \$251.1          |
| Centre                 | \$97.4         | \$157.4          | \$120.1        | \$101.5        | \$183.7        | \$660.2          |
| Fulton                 | \$1.7          | \$4.9            | \$4.5          | \$3.5          | \$7.5          | \$22.1           |
| Huntingdon             | \$15.3         | \$40.1           | \$29.2         | \$33.1         | \$57.9         | \$175.6          |
| Juniata                | \$2.0          | \$8.6            | \$6.7          | \$6.0          | \$13.2         | \$36.5           |
| Mifflin                | \$6.6          | \$18.7           | \$12.5         | \$10.5         | \$23.3         | \$71.7           |
| <b>The Alleghenies</b> | <b>\$210.3</b> | <b>\$415.7</b>   | <b>\$321.0</b> | <b>\$285.2</b> | <b>\$570.0</b> | <b>\$1,802.2</b> |

Lodging includes short-term rentals and other 2nd home spending  
 Transportation includes both ground and air transportation

Sources: STR, County bed tax revenues, PA DOR, Tourism Economics

### The Alleghenies - Visitor Spending, 2016-2022

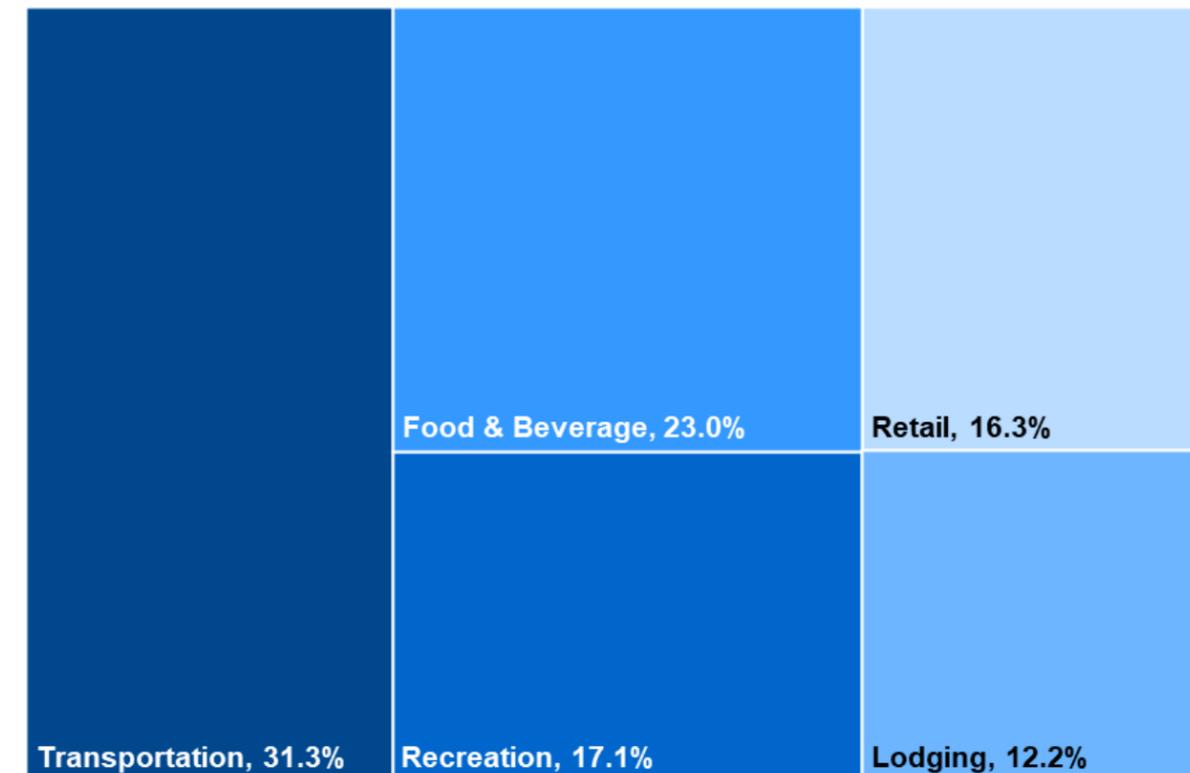
Amounts in \$ billions



Source: Tourism Economics

### Visitor Spending by Category, 2022

Percent of region total



Source: Tourism Economics

# THE ALLEGHENIES

## Economic Impacts

### Tourism Satellite Account

\$ millions, 2021-2022 percent change

| County, 2022           | Visitor Spending | Government    | Investment/<br>PCE | Total Tourism Demand |
|------------------------|------------------|---------------|--------------------|----------------------|
| Bedford                | \$294.1          | \$0.9         | \$14.5             | \$309.6              |
| Blair                  | \$371.0          | \$1.8         | \$17.8             | \$390.5              |
| Cambria                | \$288.8          | \$1.2         | \$14.0             | \$304.0              |
| Centre                 | \$797.9          | \$5.6         | \$39.5             | \$842.9              |
| Fulton                 | \$26.3           | \$0.0         | \$1.4              | \$27.7               |
| Huntingdon             | \$197.5          | \$0.7         | \$10.2             | \$208.4              |
| Juniata                | \$42.7           | \$0.1         | \$2.3              | \$45.2               |
| Mifflin                | \$85.4           | \$0.4         | \$4.4              | \$90.2               |
| <b>The Alleghenies</b> | <b>\$2,103.7</b> | <b>\$10.8</b> | <b>\$104.1</b>     | <b>\$2,218.6</b>     |
| <b>Percent Change</b>  | <b>16.7%</b>     | <b>22.0%</b>  | <b>0.1%</b>        | <b>15.9%</b>         |

| County, 2021           | Visitor Spending | Government   | Investment/<br>PCE | Total Tourism Demand |
|------------------------|------------------|--------------|--------------------|----------------------|
| Bedford                | \$258.6          | \$0.8        | \$14.9             | \$274.3              |
| Blair                  | \$326.4          | \$1.5        | \$18.3             | \$346.2              |
| Cambria                | \$251.1          | \$1.0        | \$14.2             | \$266.3              |
| Centre                 | \$660.2          | \$4.2        | \$38.2             | \$702.6              |
| Fulton                 | \$22.1           | \$0.0        | \$1.4              | \$23.5               |
| Huntingdon             | \$175.6          | \$0.7        | \$10.6             | \$186.9              |
| Juniata                | \$36.5           | \$0.1        | \$2.3              | \$38.9               |
| Mifflin                | \$71.7           | \$0.3        | \$4.3              | \$76.3               |
| <b>The Alleghenies</b> | <b>\$1,802.2</b> | <b>\$8.8</b> | <b>\$104.0</b>     | <b>\$1,915.0</b>     |

Source: Tourism Economics

# THE ALLEGHENIES

## Economic Impacts

### Travel and Tourism INDUSTRY (direct) Impacts

\$ millions, except employment (in units), 2021-2022 percent change

| County, 2022           | Visitor          |               | Labor Income   | Taxes          |                |
|------------------------|------------------|---------------|----------------|----------------|----------------|
|                        | Spend            | Employment    |                | State/Local    | Federal        |
| Bedford                | \$294.1          | 2,001         | \$59.0         | \$13.5         | \$14.8         |
| Blair                  | \$371.0          | 2,761         | \$93.2         | \$19.0         | \$21.5         |
| Cambria                | \$288.8          | 2,023         | \$72.2         | \$14.6         | \$16.7         |
| Centre                 | \$797.9          | 4,689         | \$165.3        | \$40.0         | \$40.9         |
| Fulton                 | \$26.3           | 164           | \$4.7          | \$1.1          | \$1.2          |
| Huntingdon             | \$197.5          | 1,596         | \$53.7         | \$10.2         | \$12.1         |
| Juniata                | \$42.7           | 249           | \$6.7          | \$1.8          | \$1.9          |
| Mifflin                | \$85.4           | 714           | \$20.3         | \$4.3          | \$4.8          |
| <b>The Alleghenies</b> | <b>\$2,103.7</b> | <b>14,198</b> | <b>\$475.1</b> | <b>\$104.6</b> | <b>\$113.8</b> |
| <b>Percent Change</b>  | <b>16.7%</b>     | <b>7.3%</b>   | <b>11.1%</b>   | <b>9.4%</b>    | <b>5.2%</b>    |
| County, 2021           |                  |               |                |                |                |
| Bedford                | \$258.6          | 1,839         | \$52.0         | \$12.5         | \$14.0         |
| Blair                  | \$326.4          | 2,639         | \$85.5         | \$17.9         | \$20.9         |
| Cambria                | \$251.1          | 1,922         | \$65.5         | \$13.6         | \$16.0         |
| Centre                 | \$660.2          | 4,308         | \$150.1        | \$35.5         | \$38.6         |
| Fulton                 | \$22.1           | 150           | \$4.2          | \$1.0          | \$1.2          |
| Huntingdon             | \$175.6          | 1,476         | \$46.8         | \$9.6          | \$11.4         |
| Juniata                | \$36.5           | 232           | \$5.8          | \$1.6          | \$1.7          |
| Mifflin                | \$71.7           | 661           | \$17.8         | \$3.8          | \$4.4          |
| <b>The Alleghenies</b> | <b>\$1,802.2</b> | <b>13,228</b> | <b>\$427.7</b> | <b>\$95.6</b>  | <b>\$108.1</b> |

Source: Tourism Economics

### Travel and Tourism ECONOMY (total) Impacts

\$ millions, except employment (in units), 2021-2022 percent change

| County, 2022           | Visitor          |               | Labor Income   | Taxes          |                |
|------------------------|------------------|---------------|----------------|----------------|----------------|
|                        | Spend            | Employment    |                | State/Local    | Federal        |
| Bedford                | \$309.6          | 2,921         | \$112.4        | \$25.8         | \$26.6         |
| Blair                  | \$390.5          | 4,355         | \$169.4        | \$36.1         | \$38.5         |
| Cambria                | \$304.0          | 3,369         | \$131.1        | \$27.9         | \$29.9         |
| Centre                 | \$842.9          | 7,253         | \$330.4        | \$74.0         | \$73.4         |
| Fulton                 | \$27.7           | 290           | \$8.3          | \$2.2          | \$2.2          |
| Huntingdon             | \$208.4          | 2,367         | \$92.3         | \$19.6         | \$21.6         |
| Juniata                | \$45.2           | 481           | \$12.0         | \$3.5          | \$3.4          |
| Mifflin                | \$90.2           | 1,217         | \$38.8         | \$8.1          | \$8.6          |
| <b>The Alleghenies</b> | <b>\$2,218.6</b> | <b>22,253</b> | <b>\$894.8</b> | <b>\$197.2</b> | <b>\$204.1</b> |
| <b>Percent Change</b>  | <b>15.9%</b>     | <b>6.2%</b>   | <b>8.7%</b>    | <b>8.5%</b>    | <b>5.2%</b>    |
| County, 2021           |                  |               |                |                |                |
| Bedford                | \$274.3          | 2,729         | \$101.8        | \$24.1         | \$25.2         |
| Blair                  | \$346.2          | 4,164         | \$159.4        | \$34.3         | \$37.4         |
| Cambria                | \$266.3          | 3,226         | \$122.4        | \$26.2         | \$28.7         |
| Centre                 | \$702.6          | 6,762         | \$303.1        | \$66.5         | \$69.2         |
| Fulton                 | \$23.5           | 271           | \$7.8          | \$2.0          | \$2.1          |
| Huntingdon             | \$186.9          | 2,211         | \$83.5         | \$18.4         | \$20.3         |
| Juniata                | \$38.9           | 455           | \$10.8         | \$3.1          | \$3.1          |
| Mifflin                | \$76.3           | 1,134         | \$34.6         | \$7.3          | \$7.9          |
| <b>The Alleghenies</b> | <b>\$1,915.0</b> | <b>20,952</b> | <b>\$823.3</b> | <b>\$181.8</b> | <b>\$193.9</b> |

Source: Tourism Economics

# THE ALLEGHENIES

## Visitor Spending & Employment, 2016-2022

Employment directly supported by visitor spending in The Alleghenies region reached nearly 14,200 jobs in 2022, just 5% below the region's pre-pandemic level.

### Travel and Tourism Industry Timelines, Visitor Spending & Employment

Visitor spending in \$ millions, employment in units

|                        | 2016             | 2017             | 2018             | 2019             | 2020             | 2021             | 2022             | % relative to 2019 |
|------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|--------------------|
| Bedford                | \$287.3          | \$297.4          | \$308.4          | \$307.1          | \$211.1          | \$258.6          | \$294.1          | 95.8%              |
| Blair                  | \$335.2          | \$358.0          | \$358.1          | \$374.4          | \$258.0          | \$326.4          | \$371.0          | 99.1%              |
| Cambria                | \$310.9          | \$315.8          | \$316.4          | \$310.7          | \$205.2          | \$251.1          | \$288.8          | 93.0%              |
| Centre                 | \$748.5          | \$794.2          | \$809.1          | \$823.4          | \$495.6          | \$660.2          | \$797.9          | 96.9%              |
| Fulton                 | \$23.5           | \$24.7           | \$25.3           | \$26.1           | \$17.2           | \$22.1           | \$26.3           | 100.7%             |
| Huntingdon             | \$166.5          | \$173.0          | \$176.6          | \$178.6          | \$143.2          | \$175.6          | \$197.5          | 110.6%             |
| Juniata                | \$36.7           | \$36.7           | \$36.8           | \$35.9           | \$28.0           | \$36.5           | \$42.7           | 119.1%             |
| Mifflin                | \$72.0           | \$66.4           | \$69.4           | \$72.9           | \$54.4           | \$71.7           | \$85.4           | 117.1%             |
| <b>The Alleghenies</b> | <b>\$1,980.7</b> | <b>\$2,066.1</b> | <b>\$2,100.0</b> | <b>\$2,129.1</b> | <b>\$1,412.7</b> | <b>\$1,802.2</b> | <b>\$2,103.7</b> | <b>98.8%</b>       |
| <b>Percent Change</b>  | <b>1.6%</b>      | <b>4.3%</b>      | <b>1.6%</b>      | <b>1.4%</b>      | <b>-33.6%</b>    | <b>27.6%</b>     | <b>16.7%</b>     |                    |

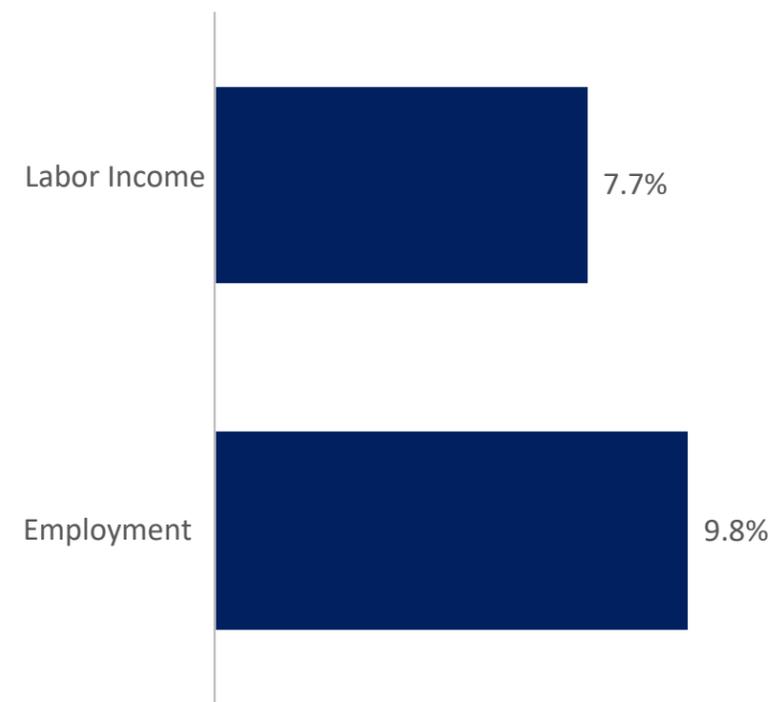
|                        | 2016          | 2017          | 2018          | 2019          | 2020          | 2021          | 2022          | % relative to 2019 |
|------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|--------------------|
| Bedford                | 2,054         | 2,080         | 2,174         | 2,172         | 1,639         | 1,839         | 2,001         | 92.1%              |
| Blair                  | 2,758         | 2,796         | 2,779         | 2,841         | 2,298         | 2,639         | 2,761         | 97.2%              |
| Cambria                | 2,061         | 2,047         | 2,076         | 2,090         | 1,716         | 1,922         | 2,023         | 96.8%              |
| Centre                 | 5,004         | 5,049         | 5,120         | 5,219         | 3,870         | 4,308         | 4,689         | 89.8%              |
| Fulton                 | 161           | 167           | 174           | 177           | 135           | 150           | 164           | 92.6%              |
| Huntingdon             | 1,394         | 1,421         | 1,444         | 1,470         | 1,300         | 1,476         | 1,596         | 108.6%             |
| Juniata                | 231           | 232           | 233           | 230           | 203           | 232           | 249           | 108.3%             |
| Mifflin                | 641           | 651           | 663           | 688           | 585           | 661           | 714           | 103.8%             |
| <b>The Alleghenies</b> | <b>14,306</b> | <b>14,442</b> | <b>14,665</b> | <b>14,888</b> | <b>11,744</b> | <b>13,228</b> | <b>14,198</b> | <b>95.4%</b>       |
| <b>Percent Change</b>  | <b>2.0%</b>   | <b>1.0%</b>   | <b>1.5%</b>   | <b>1.5%</b>   | <b>-21.1%</b> | <b>12.6%</b>  | <b>7.3%</b>   |                    |

Source: Tourism Economics

The 14,200 jobs supported by visitor spending in The Alleghenies region represented 1 out of every 10.2 jobs in the region in 2022.

### Travel and Tourism Industry Share of Region Economy, 2022

Travel and tourism industry share of payroll employment and income



Source: BLS, Tourism Economics



# DUTCH COUNTRY ROADS

## Visitor Spending

Visitor spending rose 18% in the Dutch Country Roads region in 2022 to reach a new record high of \$9.4 billion, or \$300 million above 2019.

### Dutch Country Roads, Visitor Spending by Category

Amounts in \$ millions, 2021-2022 % change

| County, 2022               | Lodging          | Food & beverages | Retail           | Recreation       | Transportation   | Total            |
|----------------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| Adams                      | \$87.4           | \$154.3          | \$121.9          | \$179.4          | \$193.2          | \$736.3          |
| Berks                      | \$92.0           | \$224.1          | \$181.1          | \$181.2          | \$304.8          | \$983.2          |
| Cumberland                 | \$110.8          | \$217.0          | \$149.0          | \$168.0          | \$242.4          | \$887.3          |
| Dauphin                    | \$353.6          | \$491.6          | \$373.6          | \$623.9          | \$618.3          | \$2,461.0        |
| Franklin                   | \$41.6           | \$91.5           | \$61.7           | \$75.6           | \$107.9          | \$378.2          |
| Lancaster                  | \$359.0          | \$552.1          | \$476.6          | \$470.4          | \$614.3          | \$2,472.4        |
| Lebanon                    | \$30.4           | \$72.0           | \$52.1           | \$52.6           | \$89.4           | \$296.4          |
| Perry                      | \$2.3            | \$14.1           | \$10.3           | \$7.4            | \$23.2           | \$57.3           |
| York                       | \$109.8          | \$256.2          | \$185.1          | \$223.1          | \$344.3          | \$1,118.4        |
| <b>Dutch Country Roads</b> | <b>\$1,186.8</b> | <b>\$2,072.9</b> | <b>\$1,611.5</b> | <b>\$1,981.6</b> | <b>\$2,537.9</b> | <b>\$9,390.6</b> |
| <b>Percent Change</b>      | <b>21.4%</b>     | <b>16.3%</b>     | <b>8.5%</b>      | <b>25.5%</b>     | <b>20.2%</b>     | <b>18.3%</b>     |

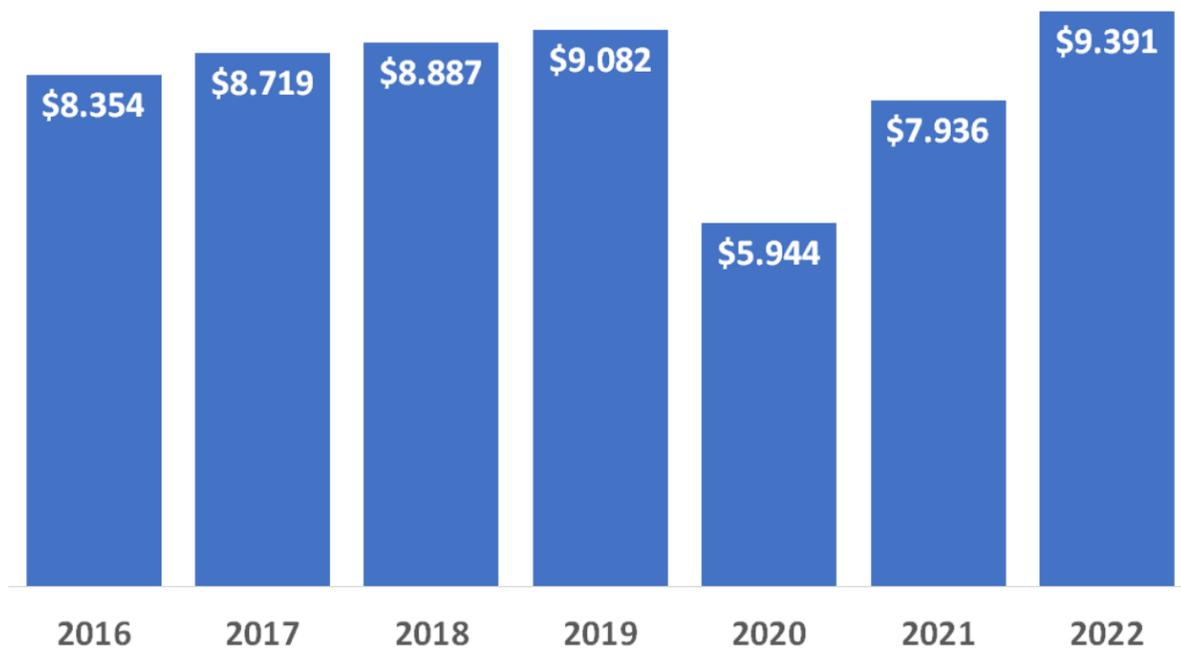
| County, 2021               | Lodging        | Food & beverages | Retail           | Recreation       | Transportation   | Total            |
|----------------------------|----------------|------------------|------------------|------------------|------------------|------------------|
| Adams                      | \$75.7         | \$136.3          | \$114.5          | \$144.1          | \$159.9          | \$630.4          |
| Berks                      | \$81.4         | \$197.2          | \$170.6          | \$145.9          | \$259.3          | \$854.3          |
| Cumberland                 | \$95.4         | \$190.7          | \$140.5          | \$141.0          | \$207.4          | \$775.0          |
| Dauphin                    | \$280.3        | \$415.0          | \$338.2          | \$467.1          | \$505.4          | \$2,005.9        |
| Franklin                   | \$35.6         | \$80.7           | \$58.0           | \$59.3           | \$91.3           | \$325.1          |
| Lancaster                  | \$293.7        | \$470.2          | \$438.9          | \$409.8          | \$512.2          | \$2,124.7        |
| Lebanon                    | \$26.0         | \$61.9           | \$48.8           | \$42.4           | \$79.7           | \$258.8          |
| Perry                      | \$1.7          | \$11.8           | \$9.3            | \$6.4            | \$18.1           | \$47.2           |
| York                       | \$87.9         | \$217.8          | \$166.9          | \$162.8          | \$278.6          | \$914.0          |
| <b>Dutch Country Roads</b> | <b>\$977.6</b> | <b>\$1,781.6</b> | <b>\$1,485.8</b> | <b>\$1,578.7</b> | <b>\$2,111.8</b> | <b>\$7,935.5</b> |

Lodging includes short-term rentals and other 2nd home spending  
 Transportation includes both ground and air transportation

Sources: STR, County bed tax revenues, PA DOR, Tourism Economics

### Dutch Country Roads - Visitor Spending, 2016-2022

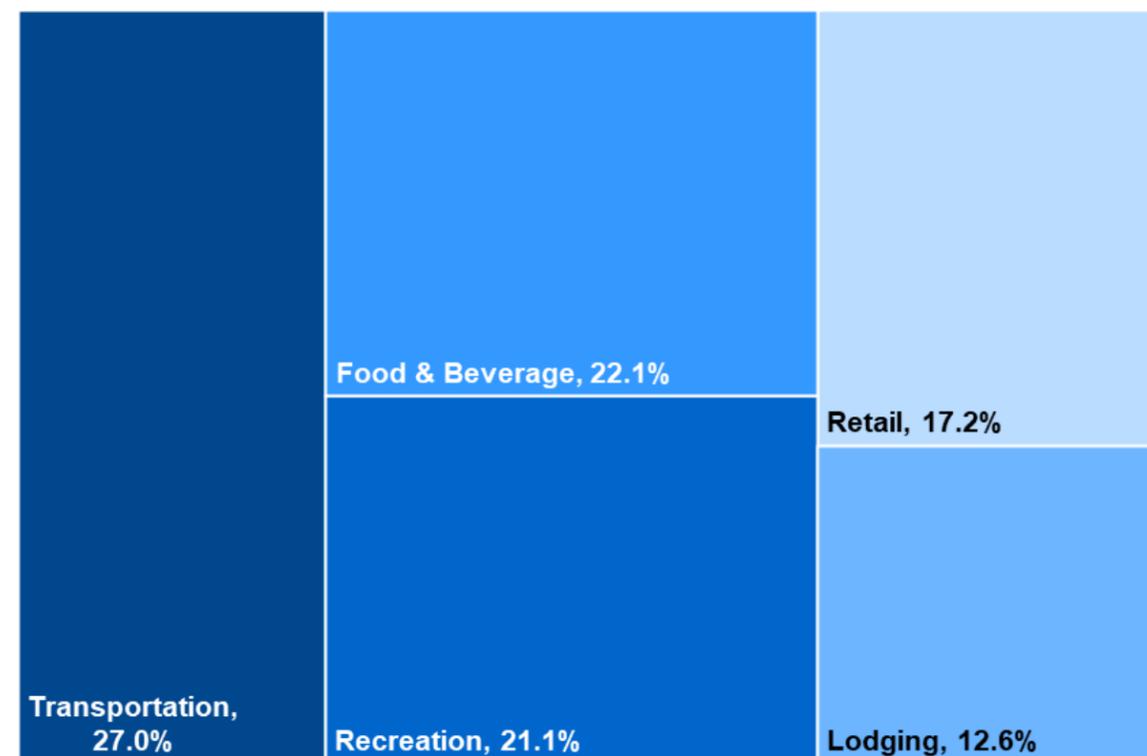
Amounts in \$ billions



Source: Tourism Economics

### Visitor Spending by Category, 2022

Percent of region total



Source: Tourism Economics

# DUTCH COUNTRY ROADS

## Economic Impacts

### Tourism Satellite Account

\$ millions, 2021-2022 percent change

| County, 2022               | Visitor Spending | Government    | Investment/ PCE | Total Tourism Demand |
|----------------------------|------------------|---------------|-----------------|----------------------|
| Adams                      | \$736.3          | \$3.8         | \$35.5          | \$775.7              |
| Berks                      | \$983.2          | \$4.3         | \$47.2          | \$1,034.7            |
| Cumberland                 | \$887.3          | \$3.5         | \$42.6          | \$933.4              |
| Dauphin                    | \$2,461.0        | \$14.3        | \$117.8         | \$2,593.2            |
| Franklin                   | \$378.2          | \$1.8         | \$18.4          | \$398.4              |
| Lancaster                  | \$2,472.4        | \$14.8        | \$118.3         | \$2,605.5            |
| Lebanon                    | \$296.4          | \$1.5         | \$14.4          | \$312.3              |
| Perry                      | \$57.3           | \$0.1         | \$3.1           | \$60.5               |
| York                       | \$1,118.4        | \$5.2         | \$53.7          | \$1,177.3            |
| <b>Dutch Country Roads</b> | <b>\$9,390.6</b> | <b>\$49.3</b> | <b>\$451.1</b>  | <b>\$9,891.0</b>     |
| <b>Percent Change</b>      | <b>18.3%</b>     | <b>17.5%</b>  | <b>1.5%</b>     | <b>17.4%</b>         |

| County, 2021               | Visitor Spending | Government    | Investment/ PCE | Total Tourism Demand |
|----------------------------|------------------|---------------|-----------------|----------------------|
| Adams                      | \$630.4          | \$3.3         | \$35.4          | \$669.1              |
| Berks                      | \$854.3          | \$3.8         | \$47.8          | \$906.0              |
| Cumberland                 | \$775.0          | \$3.0         | \$43.4          | \$821.4              |
| Dauphin                    | \$2,005.9        | \$12.4        | \$112.0         | \$2,130.4            |
| Franklin                   | \$325.1          | \$1.6         | \$18.4          | \$345.0              |
| Lancaster                  | \$2,124.7        | \$12.5        | \$118.7         | \$2,255.9            |
| Lebanon                    | \$258.8          | \$1.2         | \$14.6          | \$274.7              |
| Perry                      | \$47.2           | \$0.1         | \$2.9           | \$50.2               |
| York                       | \$914.0          | \$4.1         | \$51.1          | \$969.2              |
| <b>Dutch Country Roads</b> | <b>\$7,935.5</b> | <b>\$42.0</b> | <b>\$444.4</b>  | <b>\$8,421.9</b>     |

Source: Tourism Economics

# DUTCH COUNTRY ROADS

## Economic Impacts

### Travel and Tourism INDUSTRY (direct) Impacts

\$ millions, except employment (in units), 2021-2022 percent change

| County, 2022               | Visitor          |               | Labor Income     | Taxes          |                |
|----------------------------|------------------|---------------|------------------|----------------|----------------|
|                            | Spend            | Employment    |                  | State/Local    | Federal        |
| Adams                      | \$736.3          | 4,884         | \$164.6          | \$36.6         | \$39.6         |
| Berks                      | \$983.2          | 6,550         | \$228.4          | \$48.7         | \$54.1         |
| Cumberland                 | \$887.3          | 6,103         | \$214.4          | \$44.2         | \$50.1         |
| Dauphin                    | \$2,461.0        | 18,101        | \$781.4          | \$141.7        | \$167.2        |
| Franklin                   | \$378.2          | 2,565         | \$82.8           | \$18.5         | \$20.1         |
| Lancaster                  | \$2,472.4        | 16,480        | \$575.8          | \$126.4        | \$136.3        |
| Lebanon                    | \$296.4          | 1,824         | \$67.1           | \$14.7         | \$16.1         |
| Perry                      | \$57.3           | 388           | \$9.4            | \$2.4          | \$2.6          |
| York                       | \$1,118.4        | 7,980         | \$295.6          | \$58.4         | \$67.0         |
| <b>Dutch Country Roads</b> | <b>\$9,390.6</b> | <b>64,876</b> | <b>\$2,419.5</b> | <b>\$491.5</b> | <b>\$553.0</b> |
| <b>Percent Change</b>      | <b>18.3%</b>     | <b>8.9%</b>   | <b>15.2%</b>     | <b>11.1%</b>   | <b>8.2%</b>    |
| County, 2021               |                  |               |                  |                |                |
| Adams                      | \$630.4          | 4,570         | \$144.3          | \$33.2         | \$37.0         |
| Berks                      | \$854.3          | 5,970         | \$205.5          | \$45.1         | \$51.7         |
| Cumberland                 | \$775.0          | 5,719         | \$196.9          | \$41.4         | \$48.6         |
| Dauphin                    | \$2,005.9        | 16,445        | \$660.7          | \$124.6        | \$150.0        |
| Franklin                   | \$325.1          | 2,398         | \$73.2           | \$16.9         | \$18.9         |
| Lancaster                  | \$2,124.7        | 15,117        | \$503.5          | \$114.8        | \$127.4        |
| Lebanon                    | \$258.8          | 1,686         | \$58.5           | \$13.4         | \$15.1         |
| Perry                      | \$47.2           | 360           | \$8.5            | \$2.1          | \$2.4          |
| York                       | \$914.0          | 7,307         | \$249.3          | \$50.8         | \$60.0         |
| <b>Dutch Country Roads</b> | <b>\$7,935.5</b> | <b>59,574</b> | <b>\$2,100.3</b> | <b>\$442.4</b> | <b>\$510.9</b> |

Source: Tourism Economics

### Travel and Tourism ECONOMY (total) Impacts

\$ millions, except employment (in units), 2021-2022 percent change

| County, 2022               | Visitor          |                | Labor Income     | Taxes          |                |
|----------------------------|------------------|----------------|------------------|----------------|----------------|
|                            | Spend            | Employment     |                  | State/Local    | Federal        |
| Adams                      | \$775.7          | 7,430          | \$306.1          | \$68.8         | \$71.0         |
| Berks                      | \$1,034.7        | 11,146         | \$445.1          | \$92.4         | \$97.1         |
| Cumberland                 | \$933.4          | 9,413          | \$414.0          | \$84.3         | \$89.8         |
| Dauphin                    | \$2,593.2        | 26,006         | \$1,452.1        | \$268.0        | \$299.0        |
| Franklin                   | \$398.4          | 4,224          | \$154.3          | \$34.9         | \$36.0         |
| Lancaster                  | \$2,605.5        | 25,194         | \$1,072.8        | \$236.6        | \$244.5        |
| Lebanon                    | \$312.3          | 3,152          | \$126.7          | \$27.8         | \$28.8         |
| Perry                      | \$60.5           | 770            | \$17.9           | \$4.6          | \$4.6          |
| York                       | \$1,177.3        | 12,947         | \$555.6          | \$111.1        | \$120.0        |
| <b>Dutch Country Roads</b> | <b>\$9,891.0</b> | <b>100,281</b> | <b>\$4,544.7</b> | <b>\$928.6</b> | <b>\$990.9</b> |
| <b>Percent Change</b>      | <b>17.4%</b>     | <b>7.6%</b>    | <b>11.7%</b>     | <b>10.4%</b>   | <b>8.2%</b>    |
| County, 2021               |                  |                |                  |                |                |
| Adams                      | \$669.1          | 7,018          | \$278.4          | \$62.9         | \$66.3         |
| Berks                      | \$906.0          | 10,317         | \$406.9          | \$86.3         | \$92.7         |
| Cumberland                 | \$821.4          | 8,886          | \$384.3          | \$79.6         | \$87.1         |
| Dauphin                    | \$2,130.4        | 23,936         | \$1,281.5        | \$236.8        | \$268.1        |
| Franklin                   | \$345.0          | 3,985          | \$140.7          | \$32.1         | \$33.9         |
| Lancaster                  | \$2,255.9        | 23,363         | \$960.8          | \$216.4        | \$228.4        |
| Lebanon                    | \$274.7          | 2,941          | \$113.0          | \$25.6         | \$27.0         |
| Perry                      | \$50.2           | 726            | \$16.4           | \$4.1          | \$4.3          |
| York                       | \$969.2          | 12,056         | \$486.3          | \$97.4         | \$107.5        |
| <b>Dutch Country Roads</b> | <b>\$8,421.9</b> | <b>93,227</b>  | <b>\$4,068.4</b> | <b>\$841.1</b> | <b>\$915.4</b> |

Source: Tourism Economics

# DUTCH COUNTRY ROADS

## Visitor Spending & Employment, 2016-2022

Employment directly supported by visitor spending grew 9% to nearly 65,000 jobs in the region in 2022, but remained 6% below the region's pre-pandemic level.

### Travel and Tourism Industry Timelines, Visitor Spending & Employment

|                            | 2016             | 2017             | 2018             | 2019             | 2020             | 2021             | 2022             | % relative to 2019 |
|----------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|--------------------|
| Adams                      | \$691.2          | \$725.9          | \$735.0          | \$750.7          | \$480.7          | \$630.4          | \$736.3          | 98.1%              |
| Berks                      | \$857.0          | \$901.9          | \$930.7          | \$950.1          | \$661.8          | \$854.3          | \$983.2          | 103.5%             |
| Cumberland                 | \$838.7          | \$881.8          | \$892.8          | \$897.2          | \$617.7          | \$775.0          | \$887.3          | 98.9%              |
| Dauphin                    | \$2,356.1        | \$2,459.6        | \$2,476.3        | \$2,566.3        | \$1,475.8        | \$2,005.9        | \$2,461.0        | 95.9%              |
| Franklin                   | \$317.6          | \$327.5          | \$332.6          | \$337.5          | \$251.1          | \$325.1          | \$378.2          | 112.1%             |
| Lancaster                  | \$2,065.5        | \$2,138.4        | \$2,200.1        | \$2,229.6        | \$1,495.6        | \$2,124.7        | \$2,472.4        | 110.9%             |
| Lebanon                    | \$205.6          | \$217.8          | \$249.0          | \$256.6          | \$187.3          | \$258.8          | \$296.4          | 115.5%             |
| Perry                      | \$48.3           | \$49.6           | \$50.6           | \$52.4           | \$36.7           | \$47.2           | \$57.3           | 109.5%             |
| York                       | \$973.5          | \$1,016.3        | \$1,019.6        | \$1,041.6        | \$737.0          | \$914.0          | \$1,118.4        | 107.4%             |
| <b>Dutch Country Roads</b> | <b>\$8,353.7</b> | <b>\$8,718.8</b> | <b>\$8,886.8</b> | <b>\$9,081.9</b> | <b>\$5,943.7</b> | <b>\$7,935.5</b> | <b>\$9,390.6</b> | <b>103.4%</b>      |
| <b>Percent Change</b>      | <b>2.4%</b>      | <b>4.4%</b>      | <b>1.9%</b>      | <b>2.2%</b>      | <b>-34.6%</b>    | <b>33.5%</b>     | <b>18.3%</b>     |                    |

|                            | 2016          | 2017          | 2018          | 2019          | 2020          | 2021          | 2022          | % relative to 2019 |
|----------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|--------------------|
| Adams                      | 5,199         | 5,272         | 5,343         | 5,392         | 4,143         | 4,570         | 4,884         | 90.6%              |
| Berks                      | 6,828         | 6,902         | 7,051         | 7,165         | 5,469         | 5,970         | 6,550         | 91.4%              |
| Cumberland                 | 6,304         | 6,442         | 6,554         | 6,592         | 5,116         | 5,719         | 6,103         | 92.6%              |
| Dauphin                    | 19,036        | 19,368        | 19,382        | 19,818        | 14,578        | 16,445        | 18,101        | 91.3%              |
| Franklin                   | 2,513         | 2,533         | 2,583         | 2,632         | 2,148         | 2,398         | 2,565         | 97.4%              |
| Lancaster                  | 16,310        | 16,554        | 16,747        | 17,145        | 13,151        | 15,117        | 16,480        | 96.1%              |
| Lebanon                    | 1,695         | 1,714         | 1,759         | 1,807         | 1,441         | 1,686         | 1,824         | 101.0%             |
| Perry                      | 347           | 346           | 345           | 346           | 304           | 360           | 388           | 112.3%             |
| York                       | 7,913         | 8,010         | 8,046         | 8,108         | 6,512         | 7,307         | 7,980         | 98.4%              |
| <b>Dutch Country Roads</b> | <b>66,147</b> | <b>67,141</b> | <b>67,810</b> | <b>69,005</b> | <b>52,863</b> | <b>59,574</b> | <b>64,876</b> | <b>94.0%</b>       |
| <b>Percent Change</b>      | <b>2.1%</b>   | <b>1.5%</b>   | <b>1.0%</b>   | <b>1.8%</b>   | <b>-23.4%</b> | <b>12.7%</b>  | <b>8.9%</b>   |                    |

Source: Tourism Economics

The 64,880 jobs supported by visitor spending in the Dutch Country Roads region represented 1 out of every 10.6 jobs in the region in 2022.

### Travel and Tourism Industry Share of Region Economy, 2022

Travel and tourism industry share of payroll employment and income



Source: BLS, Tourism Economics



# POCONO MOUNTAINS Visitor Spending

Every county in the Pocono Mountains region its surpassed pre-pandemic level of visitor spending in 2022.

## Pocono Mountains, Visitor Spending by Category

Amounts in \$ millions, 2021-2022 % change

| By County, 2022         | Lodging        | Food & beverages | Retail         | Recreation     | Transportation   | Total            |
|-------------------------|----------------|------------------|----------------|----------------|------------------|------------------|
| Carbon                  | \$80.3         | \$114.2          | \$84.8         | \$122.2        | \$162.7          | \$564.2          |
| Monroe                  | \$495.7        | \$585.3          | \$510.7        | \$550.3        | \$691.6          | \$2,833.6        |
| Pike                    | \$91.6         | \$174.8          | \$120.9        | \$139.9        | \$248.6          | \$775.8          |
| Wayne                   | \$75.0         | \$138.6          | \$97.5         | \$124.7        | \$201.3          | \$637.1          |
| <b>Pocono Mountains</b> | <b>\$742.6</b> | <b>\$1,012.8</b> | <b>\$813.9</b> | <b>\$937.1</b> | <b>\$1,304.2</b> | <b>\$4,810.7</b> |
| <b>Percent Change</b>   | <b>8.6%</b>    | <b>9.4%</b>      | <b>2.3%</b>    | <b>18.2%</b>   | <b>14.4%</b>     | <b>10.9%</b>     |
| By County, 2021         |                |                  |                |                |                  |                  |
| Carbon                  | \$75.0         | \$104.0          | \$79.8         | \$105.1        | \$138.5          | \$502.5          |
| Monroe                  | \$454.8        | \$543.2          | \$507.3        | \$467.6        | \$611.2          | \$2,584.1        |
| Pike                    | \$86.7         | \$155.2          | \$115.8        | \$116.5        | \$218.6          | \$692.8          |
| Wayne                   | \$67.4         | \$123.1          | \$92.8         | \$103.8        | \$171.3          | \$558.4          |
| <b>Pocono Mountains</b> | <b>\$684.0</b> | <b>\$925.4</b>   | <b>\$795.9</b> | <b>\$792.9</b> | <b>\$1,139.6</b> | <b>\$4,337.8</b> |

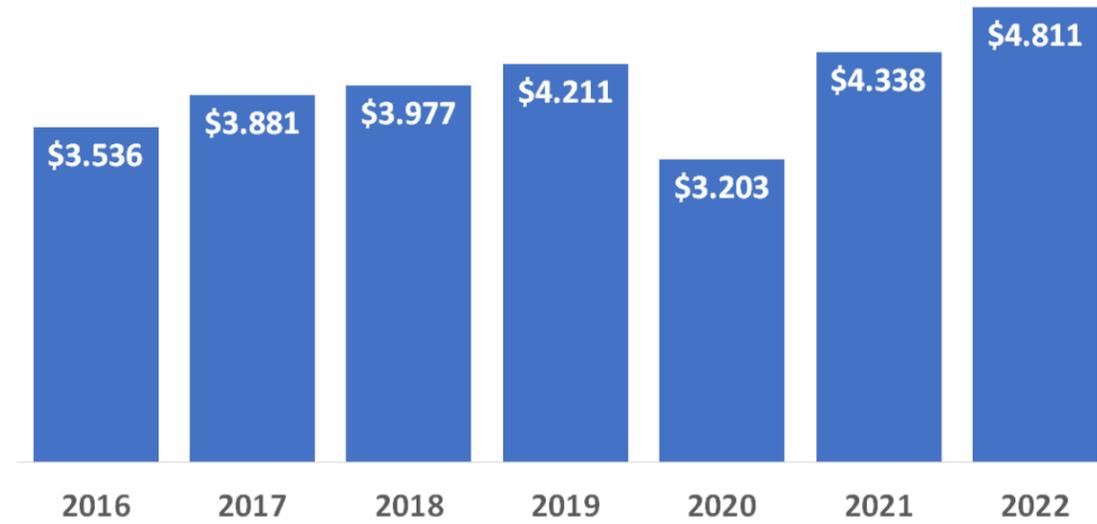
Lodging includes short-term rentals and other 2nd home spending

Transportation includes both ground and air transportation

Sources: STR, County bed tax revenues, PA DOR, Tourism Economics

## Pocono Mountains - Visitor Spending, 2016-2022

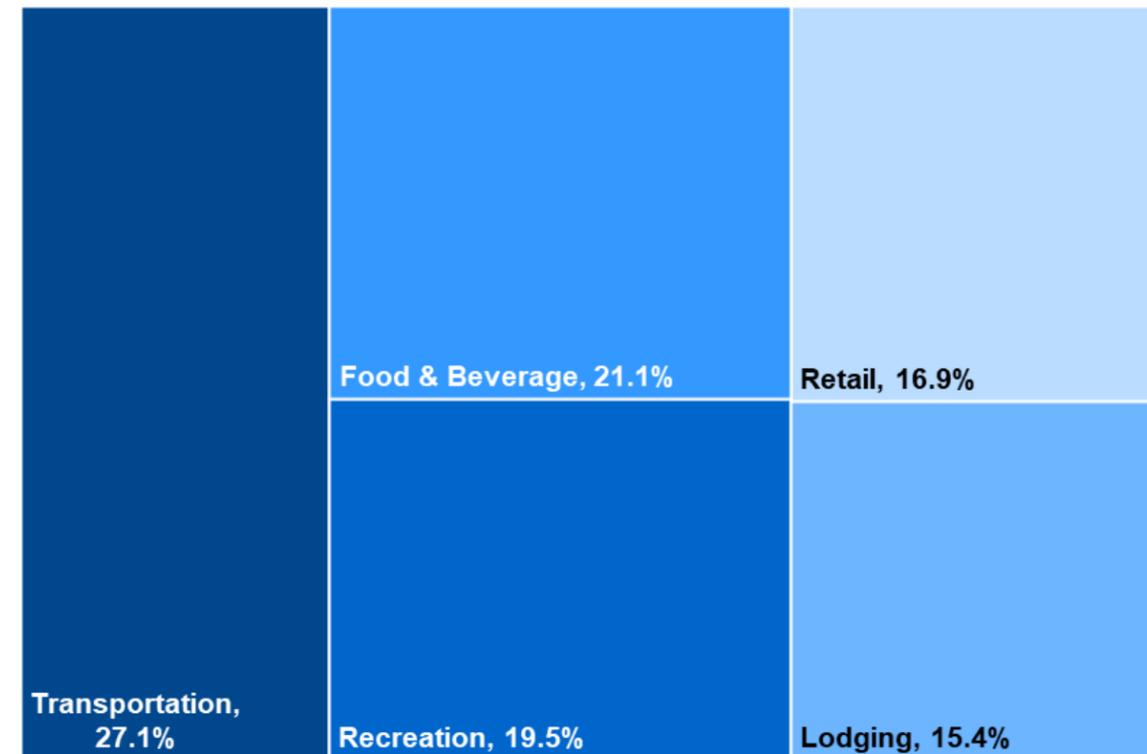
Amounts in \$ billions



Source: Tourism Economics

## Visitor Spending by Category, 2022

Percent of region total



Source: Tourism Economics

# POCONO MOUNTAINS

## Economic Impacts

### Tourism Satellite Account

\$ millions, 2021-2022 percent change

| County, 2022            | Visitor Spending | Government    | Investment/ PCE | Total Tourism Demand |
|-------------------------|------------------|---------------|-----------------|----------------------|
| Carbon                  | \$564.2          | \$2.7         | \$28.4          | \$595.3              |
| Monroe                  | \$2,833.6        | \$15.8        | \$142.2         | \$2,991.7            |
| Pike                    | \$775.8          | \$2.2         | \$43.9          | \$821.9              |
| Wayne                   | \$637.1          | \$1.8         | \$33.9          | \$672.8              |
| <b>Pocono Mountains</b> | <b>\$4,810.7</b> | <b>\$22.5</b> | <b>\$248.5</b>  | <b>\$5,081.7</b>     |
| <b>Percent Change</b>   | <b>10.9%</b>     | <b>3.7%</b>   | <b>-3.8%</b>    | <b>10.0%</b>         |
| County, 2021            |                  |               |                 |                      |
| Carbon                  | \$502.5          | \$2.6         | \$29.3          | \$534.4              |
| Monroe                  | \$2,584.1        | \$14.8        | \$150.5         | \$2,749.3            |
| Pike                    | \$692.8          | \$2.5         | \$44.3          | \$739.6              |
| Wayne                   | \$558.4          | \$1.8         | \$34.1          | \$594.3              |
| <b>Pocono Mountains</b> | <b>\$4,337.8</b> | <b>\$21.7</b> | <b>\$258.2</b>  | <b>\$4,617.7</b>     |

Source: Tourism Economics

### Travel and Tourism INDUSTRY (direct) Impacts

\$ millions, except employment (in units), 2021-2022 percent change

| County, 2022            | Visitor Spend    | Employment    | Labor Income     | Taxes          |                |
|-------------------------|------------------|---------------|------------------|----------------|----------------|
|                         |                  |               |                  | State/Local    | Federal        |
| Carbon                  | \$564.2          | 3,109         | \$96.3           | \$25.4         | \$25.8         |
| Monroe                  | \$2,833.6        | 13,340        | \$582.8          | \$137.8        | \$144.6        |
| Pike                    | \$775.8          | 5,570         | \$215.2          | \$40.0         | \$48.0         |
| Wayne                   | \$637.1          | 3,563         | \$136.4          | \$29.7         | \$33.3         |
| <b>Pocono Mountains</b> | <b>\$4,810.7</b> | <b>25,582</b> | <b>\$1,030.8</b> | <b>\$232.9</b> | <b>\$251.7</b> |
| <b>Percent Change</b>   | <b>10.9%</b>     | <b>4.5%</b>   | <b>6.9%</b>      | <b>3.5%</b>    | <b>0.8%</b>    |
| County, 2021            |                  |               |                  |                |                |
| Carbon                  | \$502.5          | 2,889         | \$86.6           | \$24.1         | \$24.9         |
| Monroe                  | \$2,584.1        | 12,978        | \$554.6          | \$134.2        | \$145.6        |
| Pike                    | \$692.8          | 5,258         | \$195.7          | \$38.5         | \$46.6         |
| Wayne                   | \$558.4          | 3,354         | \$126.9          | \$28.2         | \$32.6         |
| <b>Pocono Mountains</b> | <b>\$4,337.8</b> | <b>24,478</b> | <b>\$963.9</b>   | <b>\$225.0</b> | <b>\$249.7</b> |

### Travel and Tourism ECONOMY (total) Impacts

\$ millions, except employment (in units), 2021-2022 percent change

| County, 2022            | Visitor Spend    | Employment    | Labor Income     | Taxes          |                |
|-------------------------|------------------|---------------|------------------|----------------|----------------|
|                         |                  |               |                  | State/Local    | Federal        |
| Carbon                  | \$595.3          | 4,617         | \$176.5          | \$47.8         | \$46.4         |
| Monroe                  | \$2,991.7        | 19,772        | \$1,097.3        | \$257.9        | \$259.7        |
| Pike                    | \$821.9          | 7,843         | \$409.7          | \$77.3         | \$85.9         |
| Wayne                   | \$672.8          | 5,247         | \$239.2          | \$57.1         | \$59.8         |
| <b>Pocono Mountains</b> | <b>\$5,081.7</b> | <b>37,479</b> | <b>\$1,922.8</b> | <b>\$440.1</b> | <b>\$451.9</b> |
| <b>Percent Change</b>   | <b>10.0%</b>     | <b>4.6%</b>   | <b>5.3%</b>      | <b>3.1%</b>    | <b>0.8%</b>    |
| County, 2021            |                  |               |                  |                |                |
| Carbon                  | \$534.4          | 4,321         | \$162.1          | \$45.2         | \$44.8         |
| Monroe                  | \$2,749.3        | 19,130        | \$1,055.6        | \$252.7        | \$261.5        |
| Pike                    | \$739.6          | 7,428         | \$379.3          | \$74.4         | \$83.4         |
| Wayne                   | \$594.3          | 4,939         | \$229.0          | \$54.5         | \$58.5         |
| <b>Pocono Mountains</b> | <b>\$4,617.7</b> | <b>35,818</b> | <b>\$1,826.0</b> | <b>\$426.8</b> | <b>\$448.3</b> |

Source: Tourism Economics

# POCONO MOUNTAINS

## Visitor Spending & Employment, 2016-2022

Employment directly supported by visitor spending increased by 1,100 jobs in 2022, a 4.5% increase, but remained 5 percentage points below the region's pre-pandemic level.

### Travel and Tourism Industry Timelines, Visitor Spending & Employment

Visitor spending in \$ millions, employment in units

|                         | 2016             | 2017             | 2018             | 2019             | 2020             | 2021             | 2022             | % relative to 2019 |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|--------------------|
| Carbon                  | \$393.9          | \$426.5          | \$425.3          | \$447.6          | \$375.5          | \$502.5          | \$564.2          | 126.1%             |
| Monroe                  | \$2,034.7        | \$2,300.5        | \$2,351.7        | \$2,509.2        | \$1,843.8        | \$2,584.1        | \$2,833.6        | 112.9%             |
| Pike                    | \$663.7          | \$691.9          | \$720.9          | \$737.3          | \$555.7          | \$692.8          | \$775.8          | 105.2%             |
| Wayne                   | \$443.8          | \$462.3          | \$478.9          | \$517.1          | \$428.3          | \$558.4          | \$637.1          | 123.2%             |
| <b>Pocono Mountains</b> | <b>\$3,536.1</b> | <b>\$3,881.2</b> | <b>\$3,976.9</b> | <b>\$4,211.2</b> | <b>\$3,203.4</b> | <b>\$4,337.8</b> | <b>\$4,810.7</b> | <b>114.2%</b>      |
| <b>Percent Change</b>   | <b>9.7%</b>      | <b>9.8%</b>      | <b>2.5%</b>      | <b>5.9%</b>      | <b>-23.9%</b>    | <b>35.4%</b>     | <b>10.9%</b>     |                    |

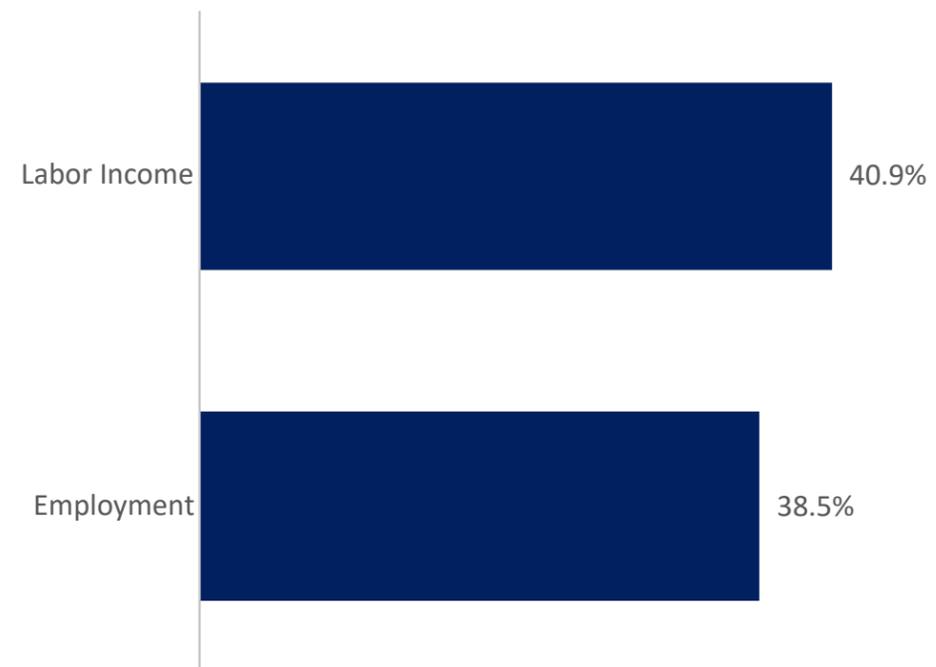
|                         | 2016          | 2017          | 2018          | 2019          | 2020          | 2021          | 2022          | % relative to 2019 |
|-------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|--------------------|
| Carbon                  | 2,897         | 2,947         | 2,938         | 3,008         | 2,491         | 2,889         | 3,109         | 103.4%             |
| Monroe                  | 14,051        | 14,489        | 14,464        | 14,749        | 11,564        | 12,978        | 13,340        | 90.4%              |
| Pike                    | 5,229         | 5,322         | 5,457         | 5,574         | 4,682         | 5,258         | 5,570         | 99.9%              |
| Wayne                   | 3,198         | 3,253         | 3,371         | 3,511         | 2,895         | 3,354         | 3,563         | 101.5%             |
| <b>Pocono Mountains</b> | <b>25,375</b> | <b>26,012</b> | <b>26,231</b> | <b>26,842</b> | <b>21,632</b> | <b>24,478</b> | <b>25,582</b> | <b>95.3%</b>       |
| <b>Percent Change</b>   | <b>4.2%</b>   | <b>2.5%</b>   | <b>0.8%</b>   | <b>2.3%</b>   | <b>-19.4%</b> | <b>13.2%</b>  | <b>4.5%</b>   |                    |

Source: Tourism Economics

The 25,580 jobs supported by visitor spending in the Pocono Mountains region represented nearly 1 out of every 2.6 jobs in the region in 2022.

### Travel and Tourism Industry Share of Region Economy, 2022

Travel and tourism industry share of payroll employment and income



Source: BLS, Tourism Economics



# UPSTATE PA Visitor Spending

Visitor spending grew 17% in the UPSTATE PA region to surpass its pre-pandemic level by \$175 million.

## UPSTATE PA, Visitor Spending by Category

Amounts in \$ millions, 2021-2022 % change

| County, 2022          | Lodging        | Food & beverages | Retail         | Recreation     | Transportation | Total            |
|-----------------------|----------------|------------------|----------------|----------------|----------------|------------------|
| Bradford              | \$22.7         | \$50.2           | \$33.3         | \$40.6         | \$79.1         | \$225.9          |
| Lackawanna            | \$88.5         | \$179.0          | \$134.4        | \$143.8        | \$180.9        | \$726.6          |
| Luzerne               | \$125.1        | \$244.1          | \$173.0        | \$200.4        | \$319.6        | \$1,062.2        |
| Schuylkill            | \$21.6         | \$60.0           | \$39.9         | \$43.8         | \$91.7         | \$257.1          |
| Sullivan              | \$4.1          | \$5.2            | \$3.9          | \$7.2          | \$6.8          | \$27.3           |
| Susquehanna           | \$14.5         | \$42.7           | \$28.6         | \$38.7         | \$76.9         | \$201.4          |
| Wyoming               | \$9.7          | \$15.1           | \$13.1         | \$11.7         | \$23.0         | \$72.6           |
| <b>UPSTATE PA</b>     | <b>\$286.3</b> | <b>\$596.4</b>   | <b>\$426.2</b> | <b>\$486.1</b> | <b>\$778.1</b> | <b>\$2,573.2</b> |
| <b>Percent Change</b> | <b>17.2%</b>   | <b>15.2%</b>     | <b>7.8%</b>    | <b>24.7%</b>   | <b>20.0%</b>   | <b>17.2%</b>     |

| County, 2021      | Lodging        | Food & beverages | Retail         | Recreation     | Transportation | Total            |
|-------------------|----------------|------------------|----------------|----------------|----------------|------------------|
| Bradford          | \$19.5         | \$43.8           | \$31.5         | \$32.4         | \$67.0         | \$194.1          |
| Lackawanna        | \$73.6         | \$154.1          | \$125.7        | \$114.8        | \$155.5        | \$623.7          |
| Luzerne           | \$106.0        | \$210.9          | \$156.2        | \$158.6        | \$266.0        | \$897.7          |
| Schuylkill        | \$20.1         | \$53.5           | \$38.7         | \$37.1         | \$73.5         | \$222.9          |
| Sullivan          | \$3.6          | \$4.9            | \$3.8          | \$6.5          | \$6.0          | \$24.8           |
| Susquehanna       | \$13.2         | \$37.2           | \$26.8         | \$31.2         | \$62.2         | \$170.5          |
| Wyoming           | \$8.4          | \$13.3           | \$12.7         | \$9.5          | \$18.4         | \$62.2           |
| <b>UPSTATE PA</b> | <b>\$244.3</b> | <b>\$517.7</b>   | <b>\$395.3</b> | <b>\$390.0</b> | <b>\$648.6</b> | <b>\$2,195.9</b> |

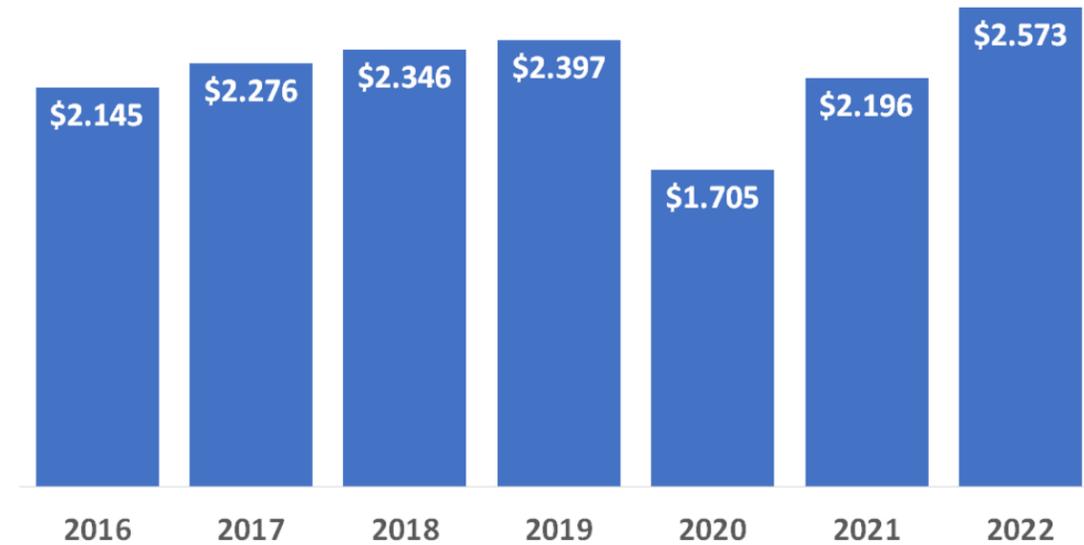
Lodging includes short-term rentals and other 2nd home spending

Transportation includes both ground and air transportation

Sources: STR, County bed tax revenues, PA DOR, Tourism Economics

## UPSTATE PA - Visitor Spending, 2016-2022

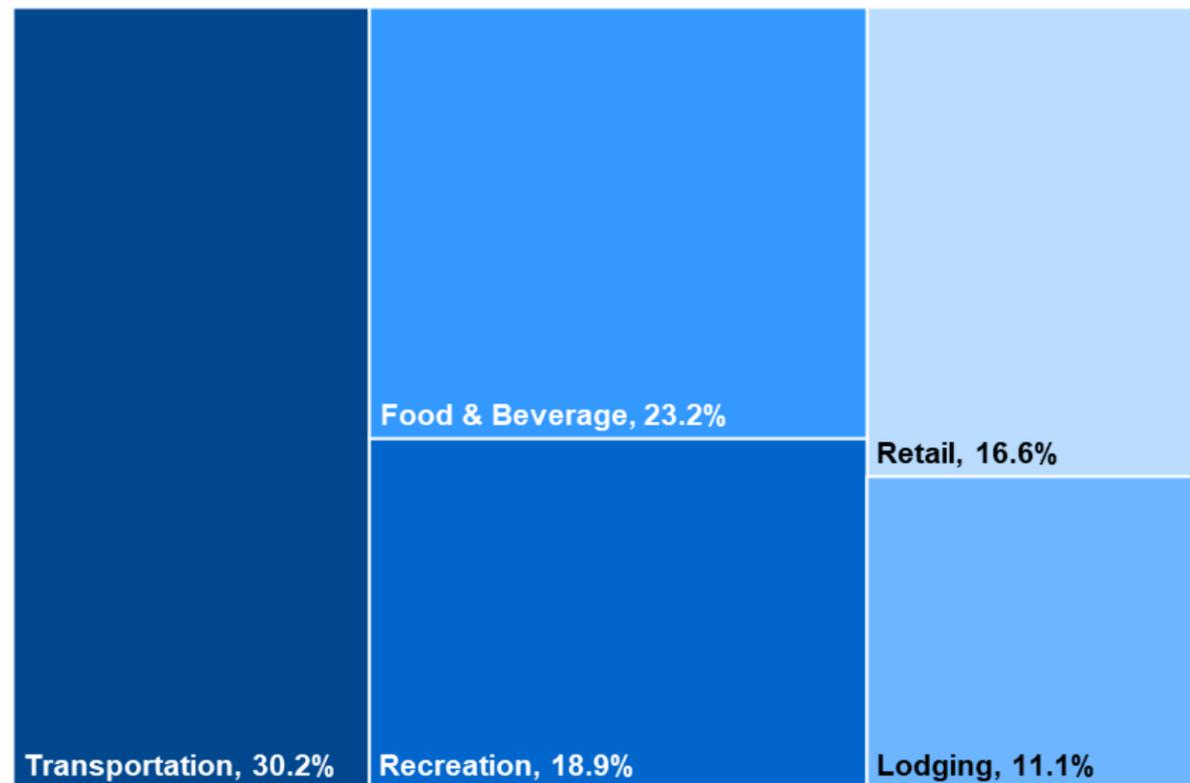
Amounts in \$ billions



Source: Tourism Economics

## Visitor Spending by Category, 2022

Percent of region total



Source: Tourism Economics

# UPSTATE PA Economic Impacts

## Tourism Satellite Account

\$ millions, 2021-2022 percent change

| County, 2022          | Visitor Spending | Government    | Investment/<br>PCE | Total Tourism Demand |
|-----------------------|------------------|---------------|--------------------|----------------------|
| Bradford              | \$225.9          | \$0.7         | \$11.5             | \$238.1              |
| Lackawanna            | \$726.6          | \$5.1         | \$35.5             | \$767.2              |
| Luzerne               | \$1,062.2        | \$5.2         | \$51.9             | \$1,119.4            |
| Schuylkill            | \$257.1          | \$1.0         | \$12.6             | \$270.8              |
| Sullivan              | \$27.3           | \$0.1         | \$2.1              | \$29.5               |
| Susquehanna           | \$201.4          | \$0.5         | \$10.8             | \$212.6              |
| Wyoming               | \$72.6           | \$0.4         | \$3.8              | \$76.8               |
| <b>UPSTATE PA</b>     | <b>\$2,573.2</b> | <b>\$13.0</b> | <b>\$128.2</b>     | <b>\$2,714.4</b>     |
| <b>Percent Change</b> | <b>17.2%</b>     | <b>15.5%</b>  | <b>0.8%</b>        | <b>16.3%</b>         |
| County, 2021          |                  |               |                    |                      |
| Bradford              | \$194.1          | \$0.6         | \$11.5             | \$206.3              |
| Lackawanna            | \$623.7          | \$4.3         | \$35.5             | \$663.5              |
| Luzerne               | \$897.7          | \$4.5         | \$51.0             | \$953.2              |
| Schuylkill            | \$222.9          | \$1.0         | \$12.7             | \$236.6              |
| Sullivan              | \$24.8           | \$0.1         | \$2.1              | \$27.0               |
| Susquehanna           | \$170.5          | \$0.4         | \$10.5             | \$181.4              |
| Wyoming               | \$62.2           | \$0.4         | \$3.8              | \$66.4               |
| <b>UPSTATE PA</b>     | <b>\$2,195.9</b> | <b>\$11.3</b> | <b>\$127.2</b>     | <b>\$2,334.3</b>     |

Source: Tourism Economics

# UPSTATE PA Economic Impacts

## Travel and Tourism INDUSTRY (direct) Impacts

\$ millions, except employment (in units), 2021-2022 percent change

| County                | Visitor Spend    | Employment    | Labor Income   | Taxes          |                |
|-----------------------|------------------|---------------|----------------|----------------|----------------|
|                       |                  |               |                | State/Local    | Federal        |
| Bradford              | \$225.9          | 1,499         | \$47.8         | \$10.5         | \$11.7         |
| Lackawanna            | \$726.6          | 5,009         | \$168.9        | \$37.9         | \$40.0         |
| Luzerne               | \$1,062.2        | 6,775         | \$276.7        | \$55.5         | \$63.0         |
| Schuylkill            | \$257.1          | 1,446         | \$56.2         | \$12.3         | \$13.6         |
| Sullivan              | \$27.3           | 205           | \$5.8          | \$1.3          | \$1.4          |
| Susquehanna           | \$201.4          | 1,276         | \$37.6         | \$8.9          | \$9.7          |
| Wyoming               | \$72.6           | 444           | \$14.0         | \$3.4          | \$3.6          |
| <b>UPSTATE PA</b>     | <b>\$2,573.2</b> | <b>16,654</b> | <b>\$606.9</b> | <b>\$129.8</b> | <b>\$143.0</b> |
| <b>Percent Change</b> | <b>17.2%</b>     | <b>8.0%</b>   | <b>13.5%</b>   | <b>9.9%</b>    | <b>6.8%</b>    |
| <b>County, 2021</b>   |                  |               |                |                |                |
| Bradford              | \$194.1          | 1,404         | \$42.7         | \$9.7          | \$11.1         |
| Lackawanna            | \$623.7          | 4,638         | \$150.3        | \$34.5         | \$37.8         |
| Luzerne               | \$897.7          | 6,275         | \$242.6        | \$50.2         | \$58.6         |
| Schuylkill            | \$222.9          | 1,329         | \$49.1         | \$11.4         | \$12.8         |
| Sullivan              | \$24.8           | 189           | \$5.2          | \$1.3          | \$1.4          |
| Susquehanna           | \$170.5          | 1,177         | \$32.5         | \$8.0          | \$9.0          |
| Wyoming               | \$62.2           | 406           | \$12.3         | \$3.2          | \$3.3          |
| <b>UPSTATE PA</b>     | <b>\$2,195.9</b> | <b>15,418</b> | <b>\$534.7</b> | <b>\$118.2</b> | <b>\$133.9</b> |

Source: Tourism Economics

## Travel and Tourism ECONOMY (total) Impacts

\$ millions, except employment (in units), 2021-2022 percent change

| County, 2022          | Visitor Spend    | Employment    | Labor Income     | Taxes          |                |
|-----------------------|------------------|---------------|------------------|----------------|----------------|
|                       |                  |               |                  | State/Local    | Federal        |
| Bradford              | \$238.1          | 2,259         | \$80.0           | \$20.2         | \$21.1         |
| Lackawanna            | \$767.2          | 7,806         | \$319.7          | \$70.2         | \$71.8         |
| Luzerne               | \$1,119.4        | 10,787        | \$521.5          | \$105.2        | \$112.9        |
| Schuylkill            | \$270.8          | 2,638         | \$97.7           | \$23.5         | \$24.4         |
| Sullivan              | \$29.5           | 284           | \$8.8            | \$2.5          | \$2.5          |
| Susquehanna           | \$212.6          | 1,934         | \$63.7           | \$17.1         | \$17.4         |
| Wyoming               | \$76.8           | 707           | \$26.7           | \$6.4          | \$6.4          |
| <b>UPSTATE PA</b>     | <b>\$2,714.4</b> | <b>26,416</b> | <b>\$1,118.1</b> | <b>\$245.1</b> | <b>\$256.5</b> |
| <b>Percent Change</b> | <b>16.3%</b>     | <b>6.6%</b>   | <b>10.0%</b>     | <b>9.2%</b>    | <b>6.8%</b>    |
| <b>County, 2021</b>   |                  |               |                  |                |                |
| Bradford              | \$206.3          | 2,129         | \$74.0           | \$18.7         | \$19.9         |
| Lackawanna            | \$663.5          | 7,318         | \$289.6          | \$64.5         | \$67.8         |
| Luzerne               | \$953.2          | 10,149        | \$474.4          | \$95.8         | \$105.0        |
| Schuylkill            | \$236.6          | 2,471         | \$89.0           | \$21.7         | \$22.9         |
| Sullivan              | \$27.0           | 266           | \$8.2            | \$2.4          | \$2.5          |
| Susquehanna           | \$181.4          | 1,801         | \$57.2           | \$15.4         | \$16.1         |
| Wyoming               | \$66.4           | 656           | \$23.9           | \$5.9          | \$6.0          |
| <b>UPSTATE PA</b>     | <b>\$2,334.3</b> | <b>24,790</b> | <b>\$1,016.3</b> | <b>\$224.4</b> | <b>\$240.1</b> |

Source: Tourism Economics

# UPSTATE PA Visitor Spending & Employment, 2016-2022

Employment directly supported by visitor spending increased by nearly 1,250 jobs in the Upstate PA region in 2022, reaching 16,650 jobs, but remaining 4 percentage points below the region's pre-pandemic level.

## Travel and Tourism Industry Timelines, Visitor Spending & Employment

Visitor spending in \$ millions, employment in units

|                       | 2016             | 2017             | 2018             | 2019             | 2020             | 2021             | 2022             | % relative to 2019 |
|-----------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|--------------------|
| Bradford              | \$196.0          | \$206.1          | \$217.8          | \$214.7          | \$161.0          | \$194.1          | \$225.9          | 105.2%             |
| Lackawanna            | \$605.8          | \$649.9          | \$667.2          | \$689.1          | \$484.1          | \$623.7          | \$726.6          | 105.5%             |
| Luzerne               | \$914.2          | \$965.3          | \$989.0          | \$1,015.7        | \$685.3          | \$897.7          | \$1,062.2        | 104.6%             |
| Schuylkill            | \$206.2          | \$216.5          | \$223.5          | \$222.1          | \$174.4          | \$222.9          | \$257.1          | 115.8%             |
| Sullivan              | \$17.7           | \$20.3           | \$21.9           | \$21.5           | \$19.2           | \$24.8           | \$27.3           | 127.5%             |
| Susquehanna           | \$153.4          | \$157.4          | \$163.0          | \$168.4          | \$125.9          | \$170.5          | \$201.4          | 119.6%             |
| Wyoming               | \$51.6           | \$60.0           | \$63.8           | \$65.4           | \$55.1           | \$62.2           | \$72.6           | 110.9%             |
| <b>UPSTATE PA</b>     | <b>\$2,144.9</b> | <b>\$2,275.5</b> | <b>\$2,346.2</b> | <b>\$2,396.7</b> | <b>\$1,704.9</b> | <b>\$2,195.9</b> | <b>\$2,573.2</b> | <b>107.4%</b>      |
| <b>Percent Change</b> | <b>-0.8%</b>     | <b>6.1%</b>      | <b>3.1%</b>      | <b>2.2%</b>      | <b>-28.9%</b>    | <b>28.8%</b>     | <b>17.2%</b>     |                    |

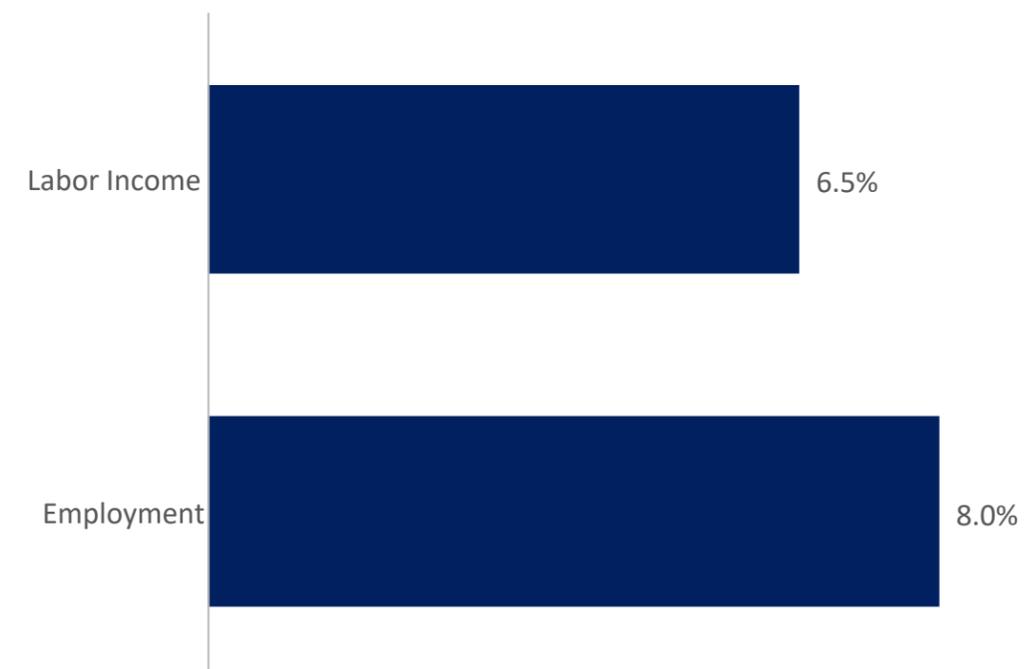
|                       | 2016          | 2017          | 2018          | 2019          | 2020          | 2021          | 2022          | % relative to 2019 |
|-----------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|--------------------|
| Bradford              | 1,378         | 1,395         | 1,434         | 1,469         | 1,280         | 1,404         | 1,499         | 102.0%             |
| Lackawanna            | 5,056         | 5,182         | 5,294         | 5,439         | 4,113         | 4,638         | 5,009         | 92.1%              |
| Luzerne               | 7,151         | 7,227         | 7,284         | 7,259         | 5,588         | 6,275         | 6,775         | 93.3%              |
| Schuylkill            | 1,253         | 1,267         | 1,287         | 1,304         | 1,157         | 1,329         | 1,446         | 110.9%             |
| Sullivan              | 172           | 175           | 183           | 183           | 165           | 189           | 205           | 111.6%             |
| Susquehanna           | 1,116         | 1,129         | 1,172         | 1,202         | 987           | 1,177         | 1,276         | 106.2%             |
| Wyoming               | 404           | 412           | 424           | 434           | 370           | 406           | 444           | 102.3%             |
| <b>UPSTATE PA</b>     | <b>16,528</b> | <b>16,787</b> | <b>17,078</b> | <b>17,291</b> | <b>13,659</b> | <b>15,418</b> | <b>16,654</b> | <b>96.3%</b>       |
| <b>Percent Change</b> | <b>0.2%</b>   | <b>1.6%</b>   | <b>1.7%</b>   | <b>1.2%</b>   | <b>-21.0%</b> | <b>12.9%</b>  | <b>8.0%</b>   |                    |

Source: Tourism Economics

The 16,650 jobs supported by visitor spending in the Upstate PA region represented 1 out of every 12.5 jobs in the region in 2022.

## Travel and Tourism Industry Share of Region Economy, 2022

Travel and tourism industry share of payroll employment and income



Source: BLS, Tourism Economics



# LEHIGH VALLEY Visitor Spending

Visitor spending grew 17% in the Lehigh Valley region in 2022, surpassing its pre-pandemic level.

## Lehigh Valley, Visitor Spending by Category

Amounts in \$ millions, 2021-2022 % change

| County, 2022          | Lodging        | Food & beverages | Retail         | Recreation     | Transportation | Total            |
|-----------------------|----------------|------------------|----------------|----------------|----------------|------------------|
| Lehigh                | \$151.0        | \$325.5          | \$245.9        | \$249.9        | \$390.4        | \$1,362.7        |
| Northampton           | \$100.3        | \$208.5          | \$135.1        | \$428.0        | \$234.5        | \$1,106.5        |
| <b>Lehigh Valley</b>  | <b>\$251.2</b> | <b>\$534.1</b>   | <b>\$381.0</b> | <b>\$677.9</b> | <b>\$624.9</b> | <b>\$2,469.1</b> |
| <b>Percent Change</b> | <b>13.3%</b>   | <b>15.2%</b>     | <b>4.5%</b>    | <b>25.0%</b>   | <b>19.0%</b>   | <b>16.6%</b>     |
| County, 2021          |                |                  |                |                |                |                  |
| Lehigh                | \$137.0        | \$283.4          | \$239.3        | \$205.1        | \$329.9        | \$1,194.7        |
| Northampton           | \$84.7         | \$180.1          | \$125.2        | \$337.4        | \$195.3        | \$922.7          |
| <b>Lehigh Valley</b>  | <b>\$221.7</b> | <b>\$463.5</b>   | <b>\$364.5</b> | <b>\$542.5</b> | <b>\$525.2</b> | <b>\$2,117.4</b> |

Lodging includes short-term rentals and other 2nd home spending

Transportation includes both ground and air transportation

Sources: STR, County bed tax revenues, PA DOR, Tourism Economics

## Lehigh Valley - Visitor Spending, 2016-2022

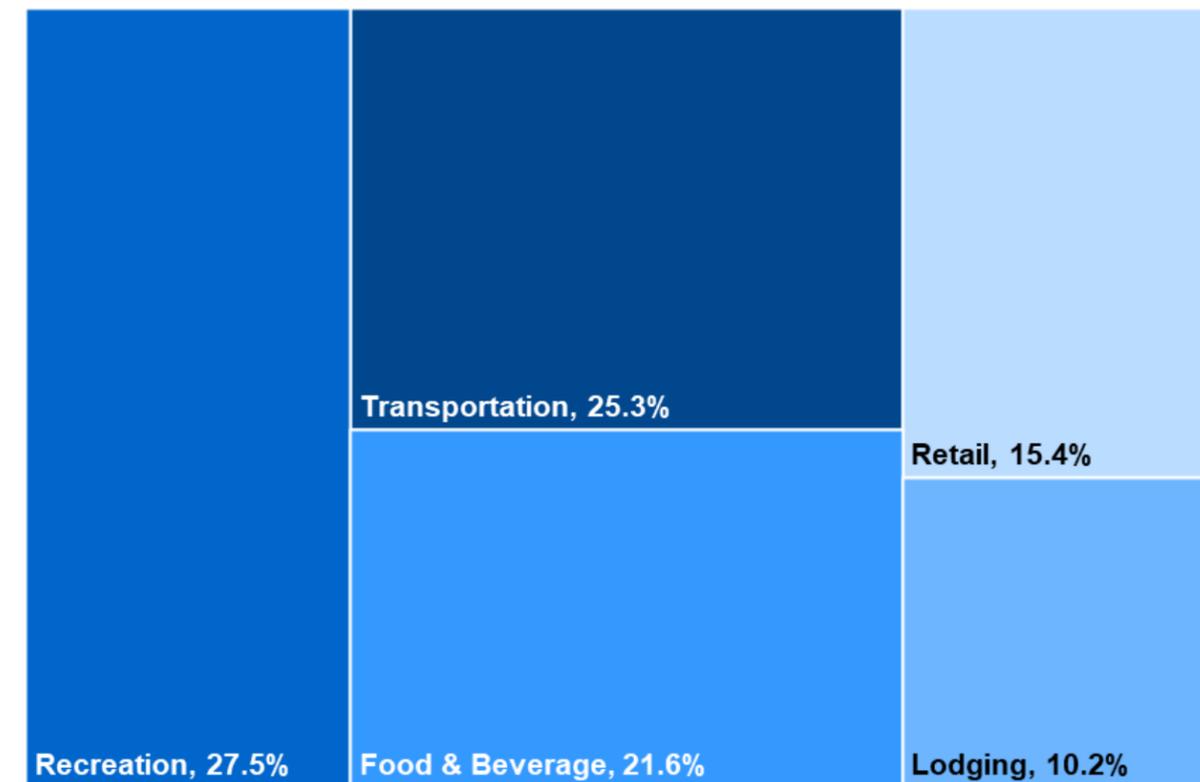
Amounts in \$ billions



Source: Tourism Economics

## Visitor Spending by Category, 2022

Percent of region total



Source: Tourism Economics

# LEHIGH VALLEY Economic Impacts

## Tourism Satellite Account

\$ millions, 2021-2022 percent change

| County, 2022          | Visitor Spending | Government    | Investment/PCE | Total Tourism Demand |
|-----------------------|------------------|---------------|----------------|----------------------|
| Lehigh                | \$1,362.7        | \$5.9         | \$65.4         | \$1,434.0            |
| Northampton           | \$1,106.5        | \$4.0         | \$53.2         | \$1,163.8            |
| <b>Lehigh Valley</b>  | <b>\$2,469.1</b> | <b>\$10.0</b> | <b>\$118.7</b> | <b>\$2,597.8</b>     |
| <b>Percent Change</b> | <b>16.6%</b>     | <b>17.5%</b>  | <b>0.1%</b>    | <b>15.7%</b>         |

| County, 2021         | Visitor Spending | Government   | Investment/PCE | Total Tourism Demand |
|----------------------|------------------|--------------|----------------|----------------------|
| Lehigh               | \$1,194.7        | \$5.0        | \$66.8         | \$1,266.6            |
| Northampton          | \$922.7          | \$3.5        | \$51.8         | \$977.9              |
| <b>Lehigh Valley</b> | <b>\$2,117.4</b> | <b>\$8.5</b> | <b>\$118.6</b> | <b>\$2,244.5</b>     |

Source: Tourism Economics

## Travel and Tourism INDUSTRY (direct) Impacts

\$ millions, except employment (in units), 2021-2022 percent change

| County, 2022          | Visitor Spend    | Employment    | Labor Income   | Taxes State/Local | Federal        |
|-----------------------|------------------|---------------|----------------|-------------------|----------------|
| Lehigh                | \$1,362.7        | 8,255         | \$323.3        | \$67.9            | \$76.0         |
| Northampton           | \$1,106.5        | 7,468         | \$342.8        | \$60.6            | \$73.9         |
| <b>Lehigh Valley</b>  | <b>\$2,469.1</b> | <b>15,724</b> | <b>\$666.1</b> | <b>\$128.6</b>    | <b>\$149.9</b> |
| <b>Percent Change</b> | <b>16.6%</b>     | <b>9.7%</b>   | <b>13.0%</b>   | <b>9.1%</b>       | <b>6.4%</b>    |

| County, 2021         | Visitor Spend    | Employment    | Labor Income   | Taxes State/Local | Federal        |
|----------------------|------------------|---------------|----------------|-------------------|----------------|
| Lehigh               | \$1,194.7        | 7,623         | \$289.6        | \$63.1            | \$72.7         |
| Northampton          | \$922.7          | 6,704         | \$299.7        | \$54.7            | \$68.3         |
| <b>Lehigh Valley</b> | <b>\$2,117.4</b> | <b>14,327</b> | <b>\$589.3</b> | <b>\$117.8</b>    | <b>\$141.0</b> |

## Travel and Tourism ECONOMY (total) Impacts

\$ millions, except employment (in units), 2021-2022 percent change

| County, 2022          | Visitor Spend    | Employment    | Labor Income     | Taxes State/Local | Federal        |
|-----------------------|------------------|---------------|------------------|-------------------|----------------|
| Lehigh                | \$1,434.0        | 13,149        | \$624.5          | \$129.1           | \$136.4        |
| Northampton           | \$1,163.8        | 11,831        | \$677.2          | \$116.8           | \$132.2        |
| <b>Lehigh Valley</b>  | <b>\$2,597.8</b> | <b>24,981</b> | <b>\$1,301.7</b> | <b>\$245.9</b>    | <b>\$268.5</b> |
| <b>Percent Change</b> | <b>15.7%</b>     | <b>8.2%</b>   | <b>10.2%</b>     | <b>8.5%</b>       | <b>6.4%</b>    |

| By County, 2021      | Visitor Spend    | Employment    | Labor Income     | Taxes State/Local | Federal        |
|----------------------|------------------|---------------|------------------|-------------------|----------------|
| Lehigh               | \$1,266.6        | 12,267        | \$568.8          | \$120.7           | \$130.3        |
| Northampton          | \$977.9          | 10,819        | \$612.7          | \$105.9           | \$122.1        |
| <b>Lehigh Valley</b> | <b>\$2,244.5</b> | <b>23,086</b> | <b>\$1,181.5</b> | <b>\$226.7</b>    | <b>\$252.4</b> |

Source: Tourism Economics

# LEHIGH VALLEY

## Visitor Spending & Employment, 2016-2022

Employment supported by visitor spending in the Lehigh Valley rose by nearly 10% in 2022, but remained 6 percentage points below the region's pre-pandemic level.

### Travel and Tourism Industry Timelines, Visitor Spending & Employment

Visitor spending in \$ millions, employment in units

|                       | 2016             | 2017             | 2018             | 2019             | 2020             | 2021             | 2022             | % relative to 2019 |
|-----------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|--------------------|
| Lehigh                | \$1,169.4        | \$1,240.9        | \$1,313.5        | \$1,359.1        | \$920.1          | \$1,194.7        | \$1,362.7        | 100.3%             |
| Northampton           | \$1,029.6        | \$1,067.3        | \$1,059.5        | \$1,089.1        | \$728.2          | \$922.7          | \$1,106.5        | 101.6%             |
| <b>Lehigh Valley</b>  | <b>\$2,199.0</b> | <b>\$2,308.2</b> | <b>\$2,373.0</b> | <b>\$2,448.1</b> | <b>\$1,648.4</b> | <b>\$2,117.4</b> | <b>\$2,469.1</b> | <b>100.9%</b>      |
| <b>Percent Change</b> | <b>4.3%</b>      | <b>5.0%</b>      | <b>2.8%</b>      | <b>3.2%</b>      | <b>-32.7%</b>    | <b>28.5%</b>     | <b>16.6%</b>     |                    |

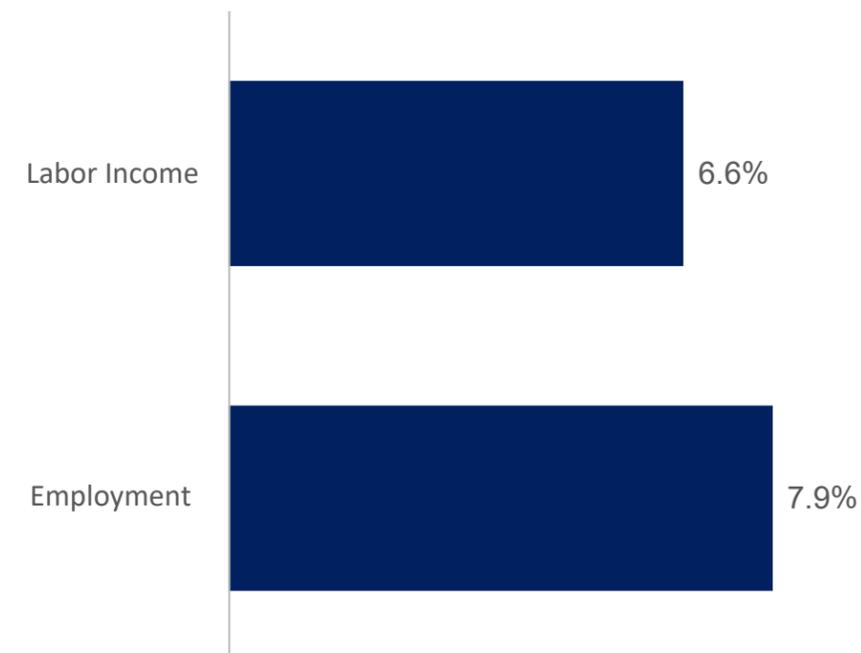
|                       | 2016          | 2017          | 2018          | 2019          | 2020          | 2021          | 2022          | % relative to 2019 |
|-----------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|--------------------|
| Lehigh                | 8,356         | 8,590         | 8,667         | 8,844         | 6,715         | 7,623         | 8,255         | 93.3%              |
| Northampton           | 7,407         | 7,611         | 7,747         | 7,925         | 6,088         | 6,704         | 7,468         | 94.2%              |
| <b>Lehigh Valley</b>  | <b>15,764</b> | <b>16,201</b> | <b>16,414</b> | <b>16,769</b> | <b>12,803</b> | <b>14,327</b> | <b>15,724</b> | <b>93.8%</b>       |
| <b>Percent Change</b> | <b>3.4%</b>   | <b>2.8%</b>   | <b>1.3%</b>   | <b>2.2%</b>   | <b>-23.7%</b> | <b>11.9%</b>  | <b>9.7%</b>   |                    |

Source: Tourism Economics

The 15,725 jobs supported by visitor spending in the Lehigh Valley region represented 1 out of every 12.6 jobs in the region in 2022.

### Travel and Tourism Industry Share of Region Economy

Travel and tourism industry share of payroll employment and income



Source: BLS, Tourism Economics



# PHILADELPHIA & THE COUNTRYSIDE

## Visitor Spending

Visitor spending rose 25% in the Philadelphia & The Countryside region in 2022 to rebound to 88% of pre-pandemic level.

### Philadelphia & The Countryside, Visitor Spending by Category

Amounts in \$ millions, 2021-2022 % change

| County, 2022                              | Lodging          | Food & beverages | Retail           | Recreation     | Transportation   | Total            |
|---|------------------|------------------|------------------|----------------|------------------|------------------|
| Bucks                                     | \$177.9          | \$210.9          | \$133.4          | \$106.7        | \$342.9          | \$971.8          |
| Chester                                   | \$138.9          | \$177.6          | \$111.2          | \$96.6         | \$247.2          | \$771.3          |
| Delaware                                  | \$140.4          | \$182.7          | \$114.4          | \$83.2         | \$304.6          | \$825.3          |
| Montgomery                                | \$327.5          | \$275.5          | \$170.5          | \$112.5        | \$515.8          | \$1,401.8        |
| Philadelphia                              | \$1,021.8        | \$1,063.0        | \$622.0          | \$456.0        | \$2,422.6        | \$5,585.4        |
| <b>Philadelphia &amp; The Countryside</b> | <b>\$1,806.6</b> | <b>\$1,909.7</b> | <b>\$1,151.5</b> | <b>\$854.9</b> | <b>\$3,833.1</b> | <b>\$9,555.7</b> |
| <b>Percent Change</b>                     | <b>42.4%</b>     | <b>26.1%</b>     | <b>16.6%</b>     | <b>33.8%</b>   | <b>19.4%</b>     | <b>25.4%</b>     |

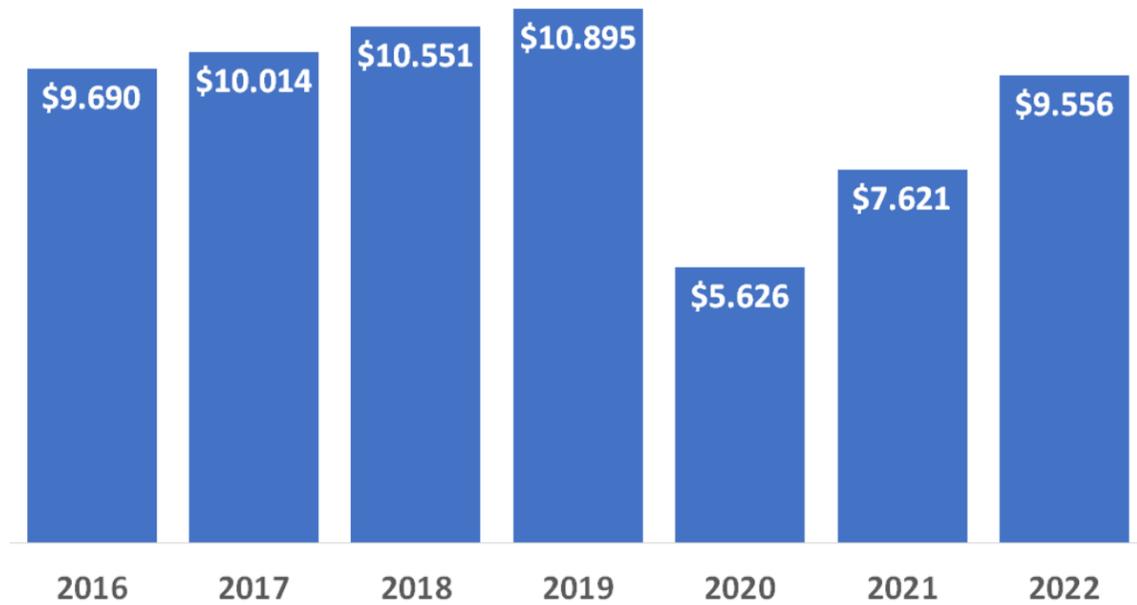
| County, 2021                              | Lodging          | Food & beverages | Retail         | Recreation     | Transportation   | Total            |
|---|------------------|------------------|----------------|----------------|------------------|------------------|
| Bucks                                     | \$153.7          | \$188.1          | \$125.6        | \$88.1         | \$286.6          | \$842.1          |
| Chester                                   | \$105.2          | \$155.1          | \$105.7        | \$79.2         | \$204.9          | \$650.2          |
| Delaware                                  | \$121.9          | \$159.8          | \$108.3        | \$69.0         | \$256.1          | \$715.0          |
| Montgomery                                | \$251.3          | \$229.6          | \$156.5        | \$88.5         | \$411.2          | \$1,137.0        |
| Philadelphia                              | \$636.5          | \$781.5          | \$491.7        | \$314.2        | \$2,052.6        | \$4,276.4        |
| <b>Philadelphia &amp; The Countryside</b> | <b>\$1,268.6</b> | <b>\$1,514.1</b> | <b>\$987.9</b> | <b>\$638.8</b> | <b>\$3,211.5</b> | <b>\$7,620.8</b> |

Lodging includes short-term rentals and other 2nd home spending  
 Transportation includes both ground and air transportation

Sources: STR, County bed tax revenues, PA DOR, Tourism Economics

### Philadelphia & The Countryside - Visitor Spending, 2016-2022

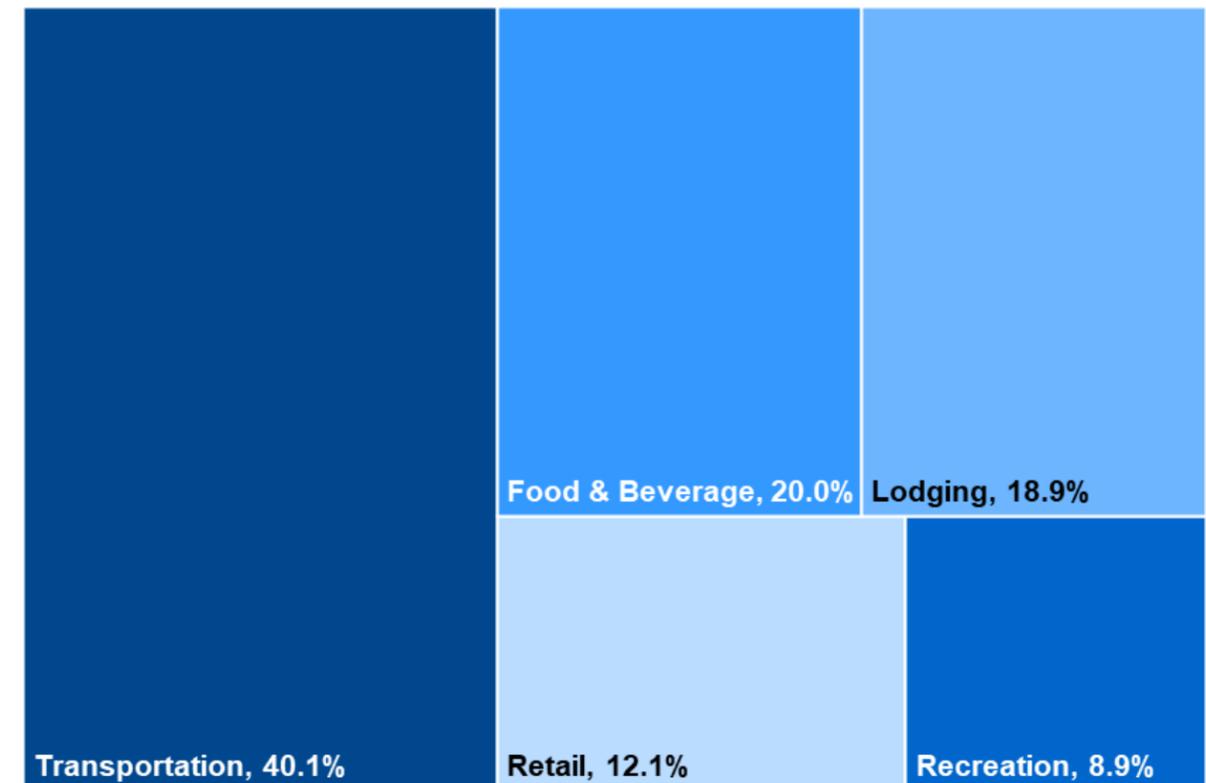
Amounts in \$ billions



Source: Tourism Economics

### Visitor Spending by Category, 2022

Percent of region total



Source: Tourism Economics

# PHILADELPHIA & THE COUNTRYSIDE

## Economic Impacts

### Tourism Satellite Account

\$ millions, 2021-2022 percent change

| County, 2022                              | Visitor Spending | Government     | Investment/PCE | Total Tourism Demand |
|---|------------------|----------------|----------------|----------------------|
| Bucks                                     | \$971.8          | \$7.5          | \$46.8         | \$1,026.1            |
| Chester                                   | \$771.3          | \$6.1          | \$37.2         | \$814.7              |
| Delaware                                  | \$825.3          | \$4.0          | \$39.7         | \$869.0              |
| Montgomery                                | \$1,401.8        | \$10.4         | \$67.3         | \$1,479.6            |
| Philadelphia                              | \$5,585.4        | \$75.5         | \$268.3        | \$5,929.2            |
| <b>Philadelphia &amp; The Countryside</b> | <b>\$9,555.7</b> | <b>\$103.4</b> | <b>\$459.4</b> | <b>\$10,118.6</b>    |
| <b>Percent Change</b>                     | <b>25.4%</b>     | <b>53.6%</b>   | <b>7.5%</b>    | <b>24.7%</b>         |

| County, 2021                              | Visitor Spending | Government    | Investment/PCE | Total Tourism Demand |
|---|------------------|---------------|----------------|----------------------|
| Bucks                                     | \$842.1          | \$6.2         | \$47.3         | \$895.7              |
| Chester                                   | \$650.2          | \$4.6         | \$36.6         | \$691.4              |
| Delaware                                  | \$715.0          | \$3.4         | \$40.1         | \$758.5              |
| Montgomery                                | \$1,137.0        | \$8.0         | \$63.7         | \$1,208.7            |
| Philadelphia                              | \$4,276.4        | \$45.1        | \$239.6        | \$4,561.1            |
| <b>Philadelphia &amp; The Countryside</b> | <b>\$7,620.8</b> | <b>\$67.3</b> | <b>\$427.3</b> | <b>\$8,115.4</b>     |

Source: Tourism Economics

### Travel and Tourism INDUSTRY (direct) Impacts

\$ millions, except employment (in units), 2021-2022 percent change

| County, 2022                              | Visitor Spend    | Employment    | Labor Income     | Taxes State/Local | Taxes Federal  |
|---|------------------|---------------|------------------|-------------------|----------------|
| Bucks                                     | \$971.8          | 9,053         | \$386.6          | \$63.8            | \$77.8         |
| Chester                                   | \$771.3          | 7,247         | \$310.7          | \$51.1            | \$62.4         |
| Delaware                                  | \$825.3          | 7,356         | \$342.0          | \$52.9            | \$68.2         |
| Montgomery                                | \$1,401.8        | 13,312        | \$592.9          | \$94.4            | \$117.6        |
| Philadelphia                              | \$5,585.4        | 32,347        | \$1,892.1        | \$373.7           | \$397.5        |
| <b>Philadelphia &amp; The Countryside</b> | <b>\$9,555.7</b> | <b>69,316</b> | <b>\$3,524.2</b> | <b>\$635.9</b>    | <b>\$723.5</b> |
| <b>Percent Change</b>                     | <b>25.4%</b>     | <b>11.4%</b>  | <b>16.5%</b>     | <b>18.3%</b>      | <b>10.9%</b>   |

| County, 2021                              | Visitor Spend    | Employment    | Labor Income     | Taxes State/Local | Taxes Federal  |
|---|------------------|---------------|------------------|-------------------|----------------|
| Bucks                                     | \$842.1          | 8,426         | \$339.8          | \$58.6            | \$73.0         |
| Chester                                   | \$650.2          | 6,557         | \$263.3          | \$45.2            | \$56.5         |
| Delaware                                  | \$715.0          | 6,857         | \$309.8          | \$49.7            | \$65.4         |
| Montgomery                                | \$1,137.0        | 12,097        | \$517.2          | \$83.7            | \$107.9        |
| Philadelphia                              | \$4,276.4        | 28,278        | \$1,596.2        | \$300.2           | \$349.8        |
| <b>Philadelphia &amp; The Countryside</b> | <b>\$7,620.8</b> | <b>62,216</b> | <b>\$3,026.1</b> | <b>\$537.4</b>    | <b>\$652.5</b> |

### Travel and Tourism ECONOMY (total) Impacts

\$ millions, except employment (in units), 2021-2022 percent change

| County, 2022                              | Visitor Spend     | Employment     | Labor Income     | Taxes State/Local | Taxes Federal    |
|---|-------------------|----------------|------------------|-------------------|------------------|
| Bucks                                     | \$1,026.1         | 16,099         | \$716.7          | \$120.0           | \$138.9          |
| Chester                                   | \$814.7           | 12,966         | \$589.8          | \$96.0            | \$111.3          |
| Delaware                                  | \$869.0           | 13,303         | \$639.5          | \$101.7           | \$121.6          |
| Montgomery                                | \$1,479.6         | 23,388         | \$1,156.6        | \$178.2           | \$209.8          |
| Philadelphia                              | \$5,929.2         | 54,996         | \$3,900.8        | \$669.9           | \$710.2          |
| <b>Philadelphia &amp; The Countryside</b> | <b>\$10,118.6</b> | <b>120,751</b> | <b>\$7,003.4</b> | <b>\$1,165.8</b>  | <b>\$1,291.8</b> |
| <b>Percent Change</b>                     | <b>24.7%</b>      | <b>9.1%</b>    | <b>12.8%</b>     | <b>15.6%</b>      | <b>10.9%</b>     |

| County, 2021                              | Visitor Spend    | Employment     | Labor Income     | Taxes State/Local | Taxes Federal    |
|---|------------------|----------------|------------------|-------------------|------------------|
| Bucks                                     | \$895.7          | 15,117         | \$646.0          | \$111.2           | \$130.2          |
| Chester                                   | \$691.4          | 11,966         | \$518.0          | \$85.8            | \$100.8          |
| Delaware                                  | \$758.5          | 12,487         | \$590.5          | \$96.2            | \$116.6          |
| Montgomery                                | \$1,208.7        | 21,603         | \$1,031.7        | \$159.7           | \$192.3          |
| Philadelphia                              | \$4,561.1        | 49,518         | \$3,422.0        | \$555.7           | \$624.7          |
| <b>Philadelphia &amp; The Countryside</b> | <b>\$8,115.4</b> | <b>110,691</b> | <b>\$6,208.2</b> | <b>\$1,008.6</b>  | <b>\$1,164.6</b> |

Source: Tourism Economics

# PHILADELPHIA & THE COUNTRYSIDE

## Visitor Spending & Employment, 2016-2022

Employment directly supported by visitor spending in the Philadelphia and The Countryside region increased by 7,100 jobs, or 11%, in 2022, but remained 12 percentage points below the region's pre-pandemic level.

The 69,315 jobs supported by visitor spending in the Philadelphia and The Countryside region represented 1 out of every 15 jobs in the region in 2022.

### Travel and Tourism Industry Timelines, Visitor Spending & Employment

Visitor spending in \$ millions, employment in units

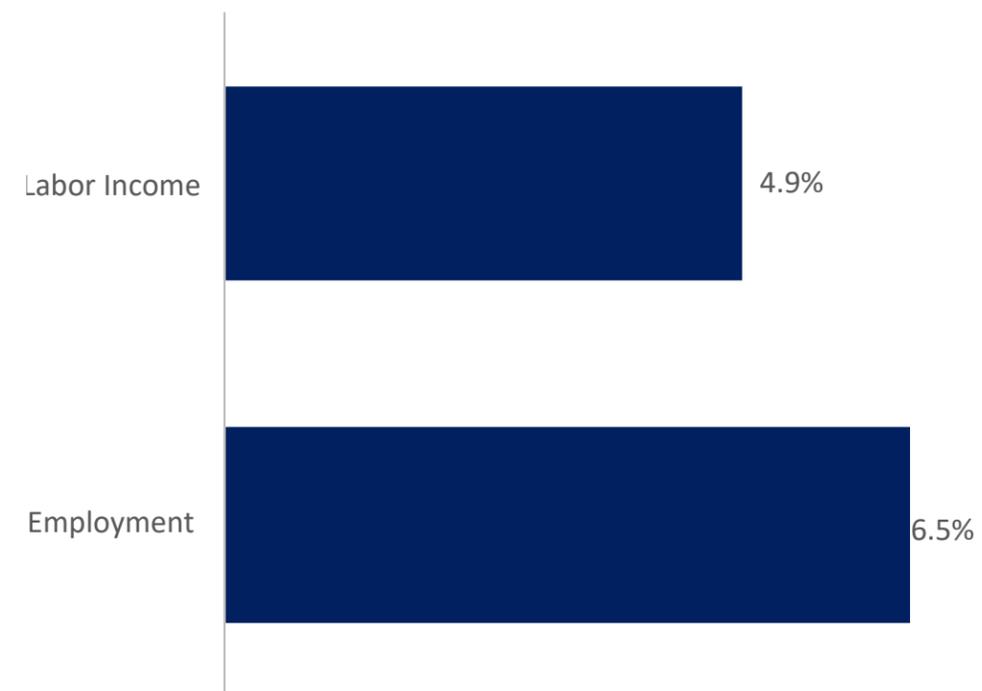
|   | 2016             | 2017              | 2018              | 2019              | 2020             | 2021             | 2022             | % relative to 2019 |
|---|------------------|-------------------|-------------------|-------------------|------------------|------------------|------------------|--------------------|
| Bucks                                     | \$813.9          | \$831.7           | \$877.2           | \$913.8           | \$669.5          | \$842.1          | \$971.8          | 106.4%             |
| Chester                                   | \$772.6          | \$800.2           | \$847.2           | \$865.2           | \$510.5          | \$650.2          | \$771.3          | 89.2%              |
| Delaware                                  | \$667.9          | \$692.4           | \$747.7           | \$770.0           | \$544.6          | \$715.0          | \$825.3          | 107.2%             |
| Montgomery                                | \$1,360.8        | \$1,390.3         | \$1,420.3         | \$1,447.5         | \$847.8          | \$1,137.0        | \$1,401.8        | 96.8%              |
| Philadelphia                              | \$6,074.3        | \$6,298.9         | \$6,658.5         | \$6,898.8         | \$3,053.7        | \$4,276.4        | \$5,585.4        | 81.0%              |
| <b>Philadelphia &amp; The Countryside</b> | <b>\$9,689.5</b> | <b>\$10,013.5</b> | <b>\$10,550.9</b> | <b>\$10,895.3</b> | <b>\$5,626.1</b> | <b>\$7,620.8</b> | <b>\$9,555.7</b> | <b>87.7%</b>       |
| <b>Percent Change</b>                     | <b>3.3%</b>      | <b>3.3%</b>       | <b>5.4%</b>       | <b>3.3%</b>       | <b>-48.4%</b>    | <b>35.5%</b>     | <b>25.4%</b>     |                    |

|   | 2016          | 2017          | 2018          | 2019          | 2020          | 2021          | 2022          | % relative to 2019 |
|---|---------------|---------------|---------------|---------------|---------------|---------------|---------------|--------------------|
| Bucks                                     | 9,161         | 9,235         | 9,418         | 9,614         | 7,450         | 8,426         | 9,053         | 94.2%              |
| Chester                                   | 7,499         | 7,679         | 7,845         | 8,015         | 5,854         | 6,557         | 7,247         | 90.4%              |
| Delaware                                  | 7,696         | 7,850         | 8,006         | 8,149         | 6,163         | 6,857         | 7,356         | 90.3%              |
| Montgomery                                | 13,965        | 14,147        | 14,318        | 14,636        | 10,737        | 12,097        | 13,312        | 91.0%              |
| Philadelphia                              | 36,361        | 37,046        | 37,953        | 38,748        | 25,479        | 28,278        | 32,347        | 83.5%              |
| <b>Philadelphia &amp; The Countryside</b> | <b>74,683</b> | <b>75,957</b> | <b>77,540</b> | <b>79,162</b> | <b>55,683</b> | <b>62,216</b> | <b>69,316</b> | <b>87.6%</b>       |
| <b>Percent Change</b>                     | <b>2.1%</b>   | <b>1.7%</b>   | <b>2.1%</b>   | <b>2.1%</b>   | <b>-29.7%</b> | <b>11.7%</b>  | <b>11.4%</b>  |                    |

Source: Tourism Economics

### Travel and Tourism Industry Share of Region Economy

Travel and tourism share of payroll employment and income



Source: BLS, Tourism Economics

## Glossary – Spending Definitions

| Term                     | Description   |
|--------------------------|---|
| <b>Lodging</b>           | Includes visitor spending in the accommodation sub-sector. This includes food and other services provided by hotels, rentals and similar establishments.    |
| <b>Food and beverage</b> | Includes all visitor spending on food & beverages, including at restaurants, bars, grocery stores and other food providers.                                 |
| <b>Recreation</b>        | Includes visitor spending within the arts, entertainment and recreation sub-sector.   |
| <b>Shopping</b>          | Includes visitor spending in all retail sub-sectors within the local economy.   |
| <b>Local transport</b>   | Includes visitor spending on local transport services such as taxis, limos, trains, rental cars, buses, and the local share of air transportation spending. |
| <b>Service stations</b>  | Visitor spending on gasoline.   |
| <b>Second homes</b>      | Where applicable, spending associated with the upkeep of seasonal second homes for recreational use as defined by the Census Bureau.                        |

## Glossary – Economic Impact Definitions

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

## ABOUT TOURISM ECONOMICS

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

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

Tourism Economics operates out of regional headquarters in Philadelphia and Oxford, with offices in Belfast, London, Frankfurt, Ontario, and Sydney.

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