



TOURISM
ECONOMICS

AN OXFORD ECONOMICS COMPANY

Economic Impact of Travel and Tourism in Pennsylvania - 2021

March 2023

Prepared for: Pennsylvania Office of Tourism



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INTRODUCTION

PROJECT BACKGROUND

The travel sector is an integral part of the Pennsylvania economy. Visitors generate significant economic benefits to households, business, and government. This economic activity represents a critical driver of the state's economy. In 2021, visitor activity supported 5.9% of all jobs in the state and the increase in visitor activity in 2021 created \$614 million more in state and local governmental revenues.

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

This is particularly important for Pennsylvania as its visitor economy rebounds. By establishing a timeline of economic impacts, the industry can track its progress.

To quantify the significance of the visitor 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 visitor economy in terms of direct visitor spending, along with total economic impacts, jobs, and fiscal (tax) impacts in the broader economy.

METHODOLOGY AND DATA SOURCES

An IMPLAN input-output model was constructed for the state of Pennsylvania. The model traces the flow of visitor-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.

Visitors included those who stayed overnight or traveled more than 50 miles to the destination.

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.

The analysis draws on the following data sources:

- Longwoods International: survey data, including spending and visitor totals for domestic visitors to Pennsylvania
- STR lodging performance data, including room demand, room rates, occupancy, and room revenue, for hotels
- Tax collections: Bed 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

DIRECT VISITOR SPENDING

Visitor activity increased significantly in 2021. With the pandemic's effects waning, businesses and venues reopening, and traveler confidence rising, the number of visitors to Pennsylvania grew to nearly 180 million visitors in 2021, an increase of more than 28 million visitors. The spending by these visitors grew \$9.1 billion in 2021 to reach \$38.0 billion spent at hotels, restaurants, retailers and other businesses that support the visitor experience in Pennsylvania. Visitor spending rebounded back to 83% of 2019 levels.



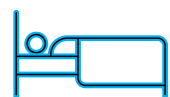
179.8 MILLION

Total Visitors to Pennsylvania in 2021



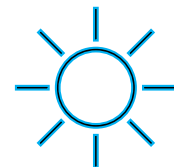
28.3 MILLION

Increase in Visitors to Pennsylvania in 2021



\$23.2B

Spending by Overnight Visitors



\$14.8B

Spending by Day Visitors



\$38.0B

Direct Visitor Spending

TOTAL ECONOMIC IMPACT

The direct visitor spending of \$38 billion generated a total economic impact of \$66.3 billion in Pennsylvania in 2021 including indirect and induced impacts. This total economic impact sustained more than 450,000 jobs and generated \$4.2 billion in state and local tax revenues in 2021.



\$66.3 BILLION

Total Economic Impact of Tourism in Pennsylvania in 2021

SUMMARY ECONOMIC IMPACTS Pennsylvania Tourism (2021)



\$38.0B

Direct Visitor Spending



\$66.3B

Total Economic Impact



452,885

Total Jobs Supported



\$4.2B

State & Local Taxes Generated



VISITS & VISITOR SPENDING

Pennsylvania tourism rebounded in 2021. With pandemic effects moderating and attractions and events reopening in 2021, travelers returned. Rising consumer confidence in travel pushed visitation and visitor spending to impressive growth rates in 2021. However, the recovery remained uneven and unfinished in 2021 as both international and business and event-related travel remained suppressed. Strength in leisure travel drove visitation and visitor spending to historical growth rates.

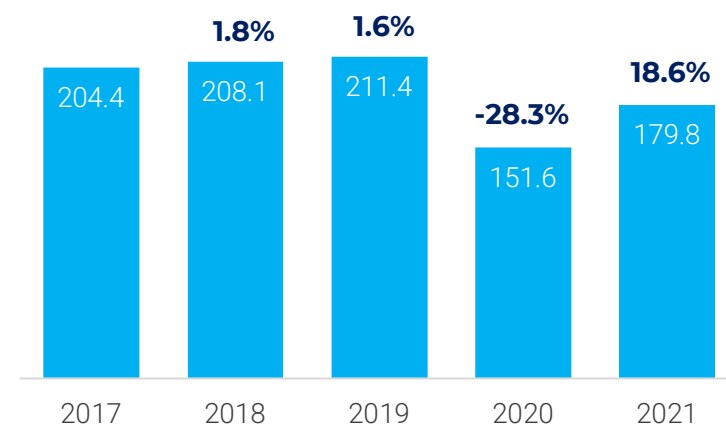
VISITOR VOLUME

Rebound in 2021

In 2021, travel confidence rebounded with easing restrictions and available vaccines. As a result, visitor volume growth was strong, registering a gain of 19% in 2021, with levels recovering to 85% of pre-pandemic levels.

Pennsylvania visitor volume

Amounts in millions



Sources: Longwoods International, Tourism Economics

VISITOR SPENDING

Visitor spending in 2021 in Pennsylvania rebounded to 83% of 2019 levels.

With trips rebounding strongly, visitor spending jumped 32% in 2021 to \$38 billion. This growth has brought spending levels to 83% of 2019 levels.

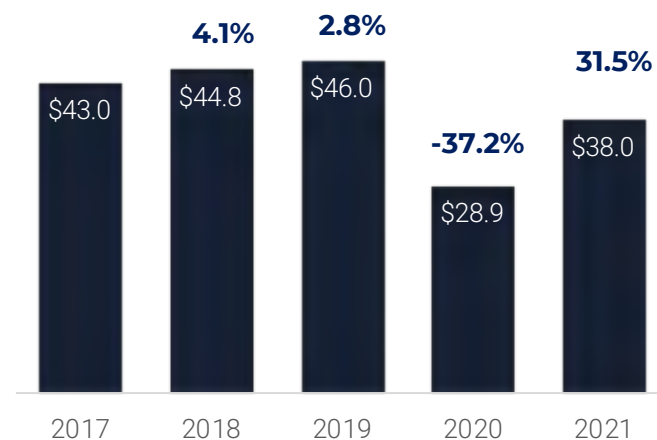
Transportation spending, including the value of the airport to the state's economy, remains the largest spending category in 2021 with 29% of each visitor dollar dedicated to transportation costs.

Visitors \$8.3 billion spent on food & beverages in 2021 – at businesses from restaurants to grocery stores – is 21% of the average visitor dollar.

Sixteen percent of each visitor dollar spent in Pennsylvania went to recreational activities with retail and lodging spending capturing the remaining 28% of each visitor dollar spent in Pennsylvania in 2021.

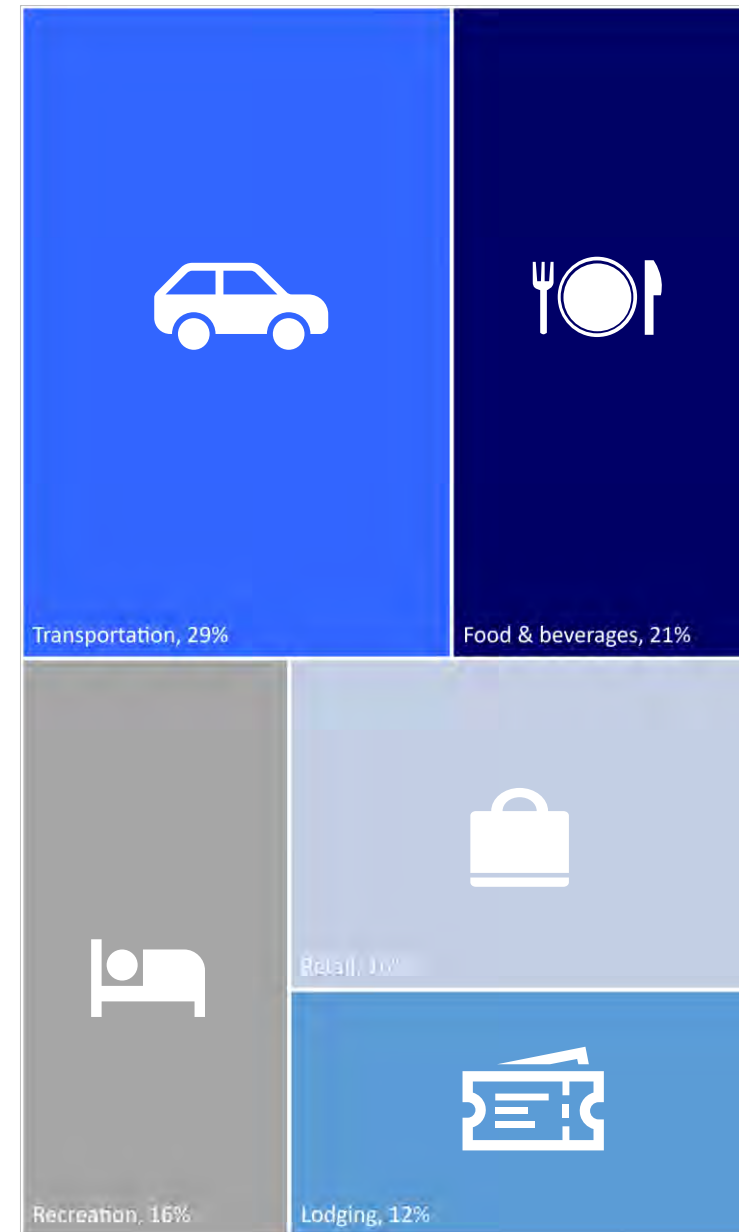
Pennsylvania visitor spending

Amounts in \$ billions



Sources: Longwoods International, Tourism Economics

\$38.0 BILLION
Total Visitor Spending in 2021



Source: Tourism Economics

Note: Lodging spending includes dollars spent on second homes. Transport includes both air and local transportation.

VISITOR SPENDING CATEGORY TRENDS

Spending grew across all spending categories with some of the strongest growth seen in the categories that had been hardest hit during the pandemic – lodging and transportation, followed by recreation. Transportation and lodging spending both grew more than 42% in 2021.

Transportation spending by visitors, which includes the value of the airports in Pennsylvania, jumped more than \$3.5 billion to recover to 80% of pre-pandemic levels.

With key venues re-opening and attractions increasing capacity, recreational spending jumped a third in 2021.

Lodging spending increased 42.5% after a fall of 47% in 2020. With that historic increase, lodging spending grew to 76% of pre-pandemic levels, up from 53% in 2020.

Spending by visitors in 2021 at clothing, sporting goods, and other shops recovered to 92% of 2019 levels, only about \$550 million from pre-pandemic levels.

VISITOR SEGMENTS

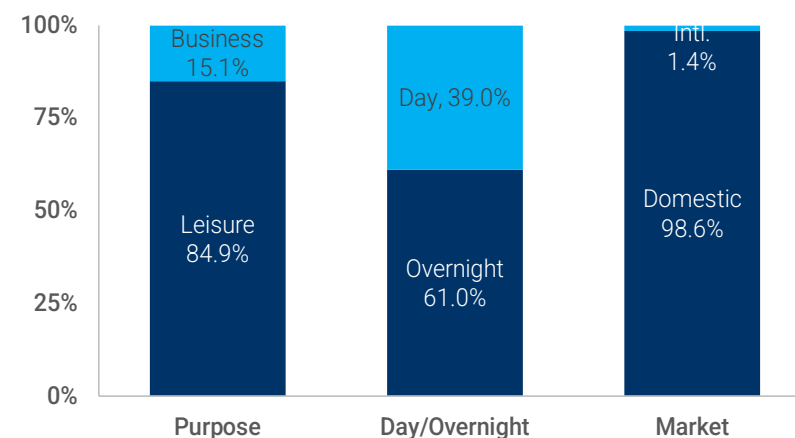
Overnight visitor spending growth has led the recovery. Spending by overnight visitors increased \$7.5 billion, 82% of the overall spending gain in 2021. With 60 million person-trips in Pennsylvania spending a total of \$23.2 billion, spending by an overnight visitor was \$388 per-person, a \$27 increase.

Day spending grew to \$14.8 billion in 2021.

Helped by the increases in overnight visitors and their spending, per-visitor spending increased by \$20.

Pennsylvania spending share by segment

Percent % of visitor spending by market



Source: Tourism Economics

Pennsylvania visitor spending and annual growth

Amounts in \$ millions, 2021 % change, and % recovered relative to 2021

	2017	2018	2019	2020	2021	2021 Growth	% relative to 2019
Total visitor spending	\$43,044	\$44,788	\$46,041	\$28,909	\$38,017	31.5%	82.6%
Lodging*	\$5,948	\$6,281	\$6,445	\$3,416	\$4,869	42.5%	75.5%
Food & beverage	\$8,999	\$9,514	\$9,860	\$6,931	\$8,335	20.3%	84.5%
Retail	\$6,745	\$6,888	\$7,042	\$5,352	\$6,495	21.4%	92.2%
Recreation	\$7,542	\$7,689	\$8,050	\$4,921	\$6,526	32.6%	81.1%
Transportation**	\$13,809	\$14,416	\$14,643	\$8,289	\$11,792	42.3%	80.5%

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

	2017	2018	2019	2020	2021
Total visitors	202.1	205.7	209.1	151.0	179.8
Day	132.9	134.3	136.5	107.5	120.0
Overnight	69.2	71.4	72.7	43.6	59.8
Total visitor spending	\$43,044	\$44,788	\$46,041	\$28,909	\$38,017
Day	\$15,639	\$16,104	\$16,722	\$13,163	\$14,812
Overnight	\$27,405	\$28,684	\$29,319	\$15,746	\$23,205
Per visitor spending	\$213	\$218	\$220	\$191	\$211
Day	\$118	\$120	\$123	\$123	\$123
Overnight	\$396	\$402	\$404	\$361	\$388

Source: Tourism Economics

VISITOR SPENDING DISTRIBUTION - LEVELS

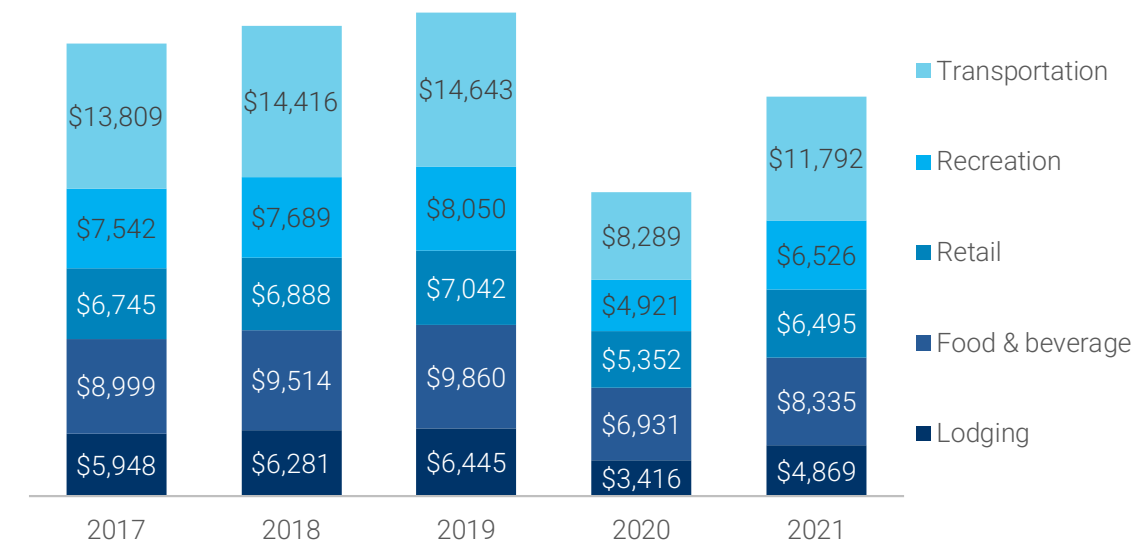
Visitor spending in 2021 increased in all the major spending categories, led by the \$3.5 billion increase in transportation spending. Driven by increases in visitation, gas prices, and the recovery in air travel, transportation spending's spending increase provided 40% of the \$9.1 billion growth in visitor spending in 2021.

Recreational spending had been hard hit during the pandemic as closures and limitations on events affected attendance and revenues. Recreational spending increased by \$1.6 billion in 2021 to reach \$6.5 billion, 81% of 2019 levels after falling to 61% of 2019 levels in 2020.

Lodging and food & beverage spending both grew by more than \$1.4 billion.

Visitor spending in Pennsylvania, 2017-2021

By category, \$ millions



Source: Tourism Economics

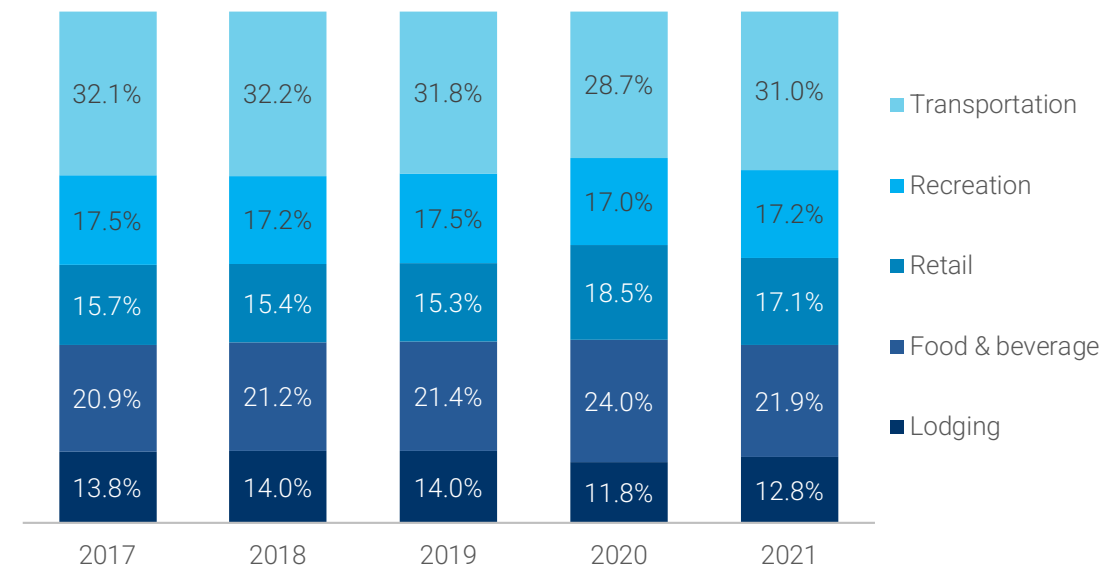
VISITOR SPENDING DISTRIBUTION - SHARES

Spending shares inched towards pre-pandemic levels as travel started to return to more normal conditions. Retail, which had increased its visitor spending share to 18.5% in 2020, fell back to 17% in 2021. This share is still higher than pre-pandemic spending behaviors, which had retail at around 15% of each visitor dollar.

Lodging spending rebounded to 12.8% of each visitor dollar after falling below 12% in 2020. Transportation spending, including the overall impact of air travel, jumped to 31% of each visitor dollar in 2021, up more than two percentage points.

Visitor spending shares in Pennsylvania, 2017-2021

By category, %



Source: Tourism Economics

VISITOR ECONOMY TRENDS

The visitor economy looks at a broader range of tourism-related expenditures. These include government support for tourism as well as capital investment (both new structures and machinery and equipment spending).

Overall, traveler demand surpassed \$40 billion in 2021, led by domestic traveler spending at \$37.5 billion. Capital investment in support of tourism grew to \$1.9 billion in 2021, an increase of 3%.

Tourism Capital Investment

Amounts in \$ millions

	2017	2018	2019	2020	2021
Total Tourism CAPEX	\$2,161	\$2,376	\$2,366	\$1,879	\$1,940
Machinery & equip.	\$1,016	\$1,058	\$1,086	\$698	\$916
Construction	\$1,145	\$1,318	\$1,279	\$1,181	\$1,024

Sources: FW Dodge, Tourism Economics

VISITOR ECONOMY DISTRIBUTION

In Pennsylvania, domestic visitor markets increased their relative importance to 92.8% of tourism demand in 2021.

Capital investment in tourism-related construction and machinery & equipment represented 4.8% of all tourism-related demand.

International visitor markets provided 1.3% of demand in 2021 as travel restrictions were in place through 2021. This is a sharp decline from 2019 when international spending was nearly 6% of all visitor demand.

The governmental support share was 0.6% of all Pennsylvania tourism demand in 2021.

Pennsylvania tourism demand

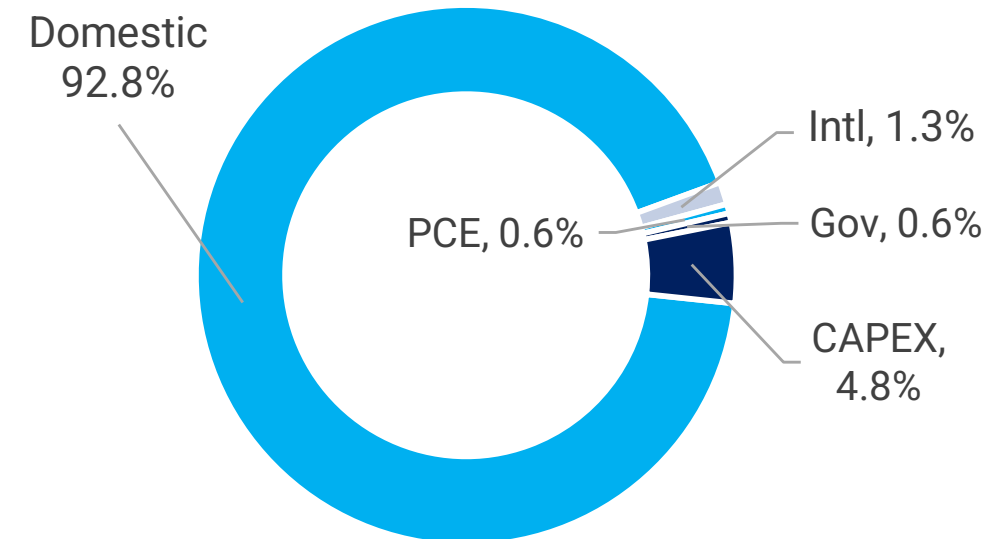
Amounts in \$ millions, 2021 % change, and % relative to 2019

	2017	2018	2019	2020	2021	2021 Growth	% relative to 2019
Tourism Demand	\$45,710	\$47,704	\$48,971	\$31,128	\$40,407	29.8%	82.5%
Domestic Visitor	\$40,158	\$41,821	\$43,161	\$28,389	\$37,478	32.0%	86.8%
International Visitor	\$2,886	\$2,967	\$2,880	\$520	\$539	3.7%	18.7%
Non-visitor PCE	\$273	\$285	\$297	\$193	\$225	16.3%	75.8%
Governmental Support	\$233	\$254	\$267	\$147	\$225	53.3%	84.3%
Capital Investment	\$2,161	\$2,376	\$2,366	\$1,879	\$1,940	3.3%	82.0%

Sources: FW Dodge, Longwoods International, Tourism Economics

Pennsylvania tourism demand

Percent distribution



Sources: FW Dodge, Longwoods International, Tourism Economics



DOMESTIC MARKET

Consumer survey information available for domestic visitors allows for a deeper analysis of domestic travel. The following slides will break out the size of certain domestic sectors along with the distribution of spending. It is noted that the information in this section will, by definition, be different than that of other sectors. The information presented here is limited to domestic travelers that have identified a Pennsylvania destination on their trip but does not count international spending nor some spending categories that consumer surveys don't consider (e.g., air travel).

DOMESTIC TRAVEL SECTORS

Nearly 180 million domestic visitors traveled to Pennsylvania in 2021. Day leisure visitors were the largest visitation sector with the overnight leisure visitor sector recapturing the largest spending sector in 2021.

Domestic visitors spent \$35.7 billion in Pennsylvania in 2021, with spending increasing by \$8.2 billion. Overnight leisure spending grew by \$5.2 billion in 2021, 63% of the overall domestic visitor spending increase.

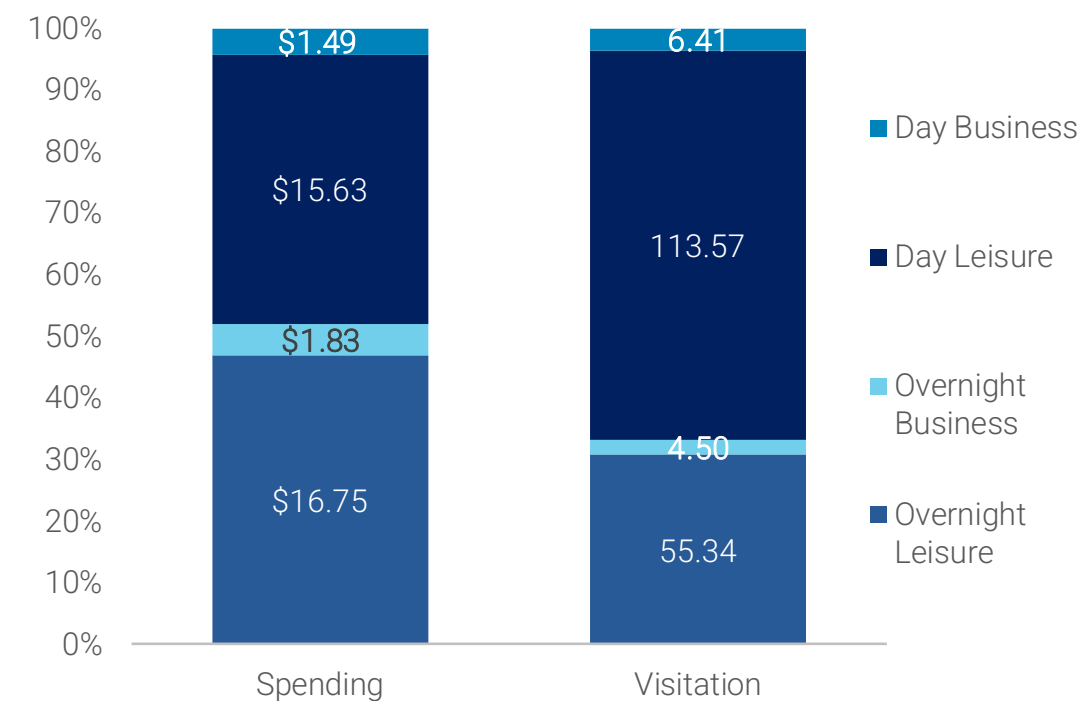
Overnight leisure visitors spent \$16.7 billion on their Pennsylvania trips in 2021. Despite this segment comprising of just over 30% of all visitors, their spending contribution was 47% of all domestic visitor spending in 2021.

Leisure travel has led the recovery as business continued to lag in 2021. Day leisure spending in 2021 is only 10% lower than pre-pandemic spending with overnight leisure recovering to 83% of 2019 levels.

After suffering the largest declines in 2020, the recovery in overnight travel was noteworthy with growth in both overnight sectors outpacing their day counterparts. Domestic overnight spending increased by 42% compared to day performance of 19% growth.

Pennsylvania domestic visitor volume and spending

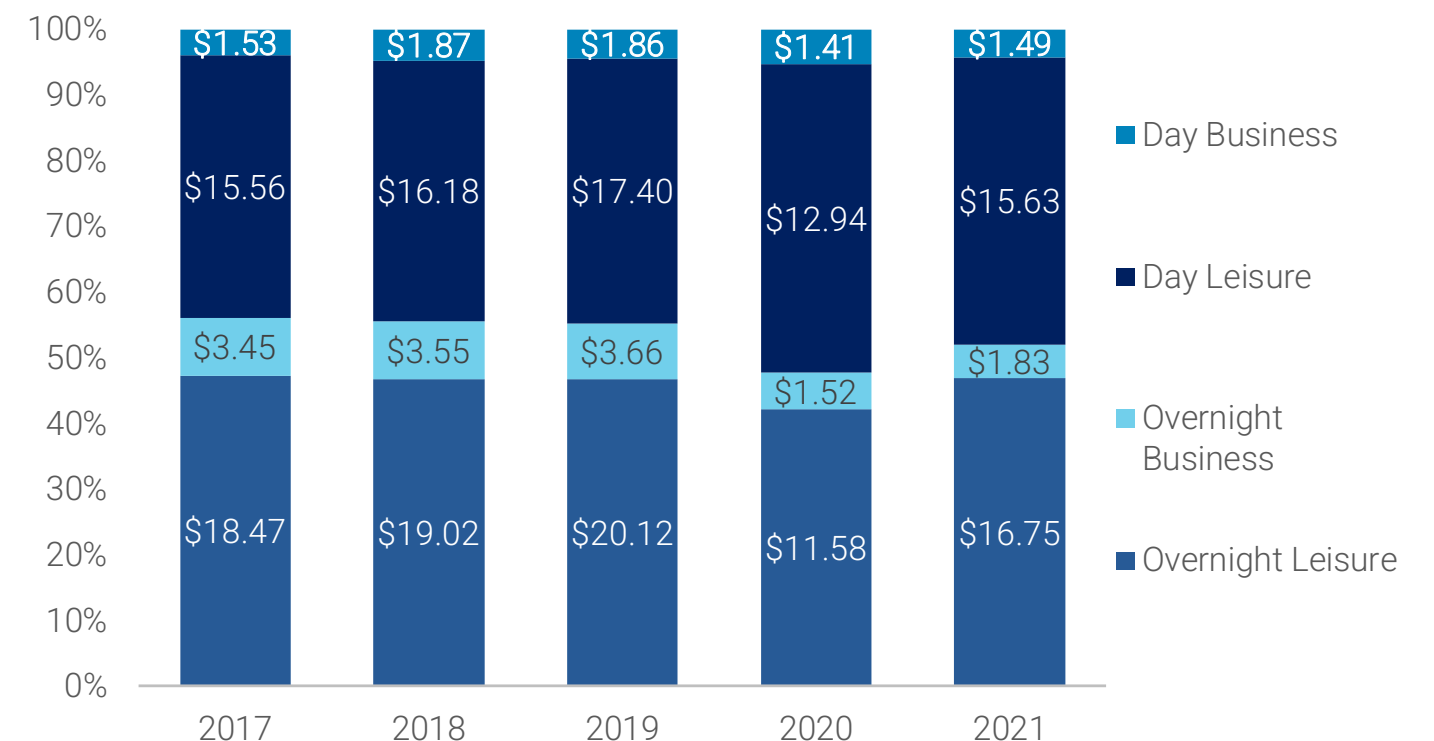
Spending in \$ billions, visitation in millions



Sources: Longwoods International, Tourism Economics

Pennsylvania domestic visitor spending

Amounts in \$ billions



Sources: Longwoods International, Tourism Economics

DOMESTIC OVERNIGHT LEISURE SECTOR

The overnight leisure sector grew 45% in 2021, the strongest rebound of all domestic sectors. With this growth, the 2021 spending level of domestic overnight leisure travelers reached 83% of 2019 levels.

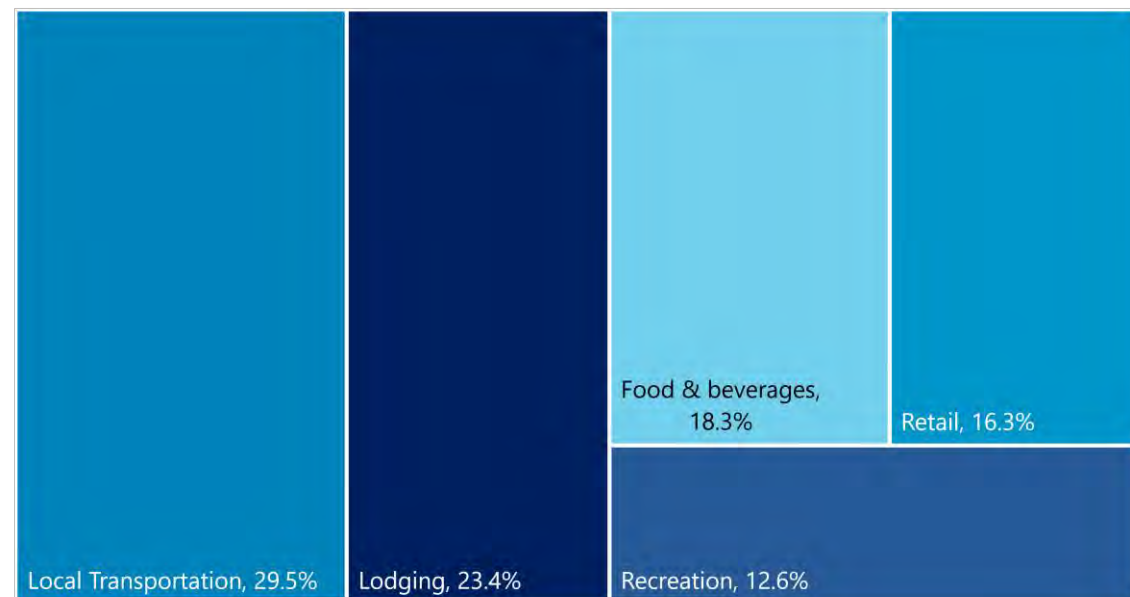
The 55.3 million overnight leisure person-trips were estimated to spend \$16.7 billion on their trips to Pennsylvania destinations in 2021. Spending increased by \$5.2 billion.

Visitors spent, on average, \$303 on each trip with per-trip spending increasing by \$10 in 2021.

The share of the domestic overnight visitor dollar spent on lodging jumped to 23.4% in 2021, compared to less than 18% in 2020 as visitors returned to hotels and motels.

Overnight leisure visitor spending, 2021

By category, share of \$



Sources: Longwoods International, Tourism Economics

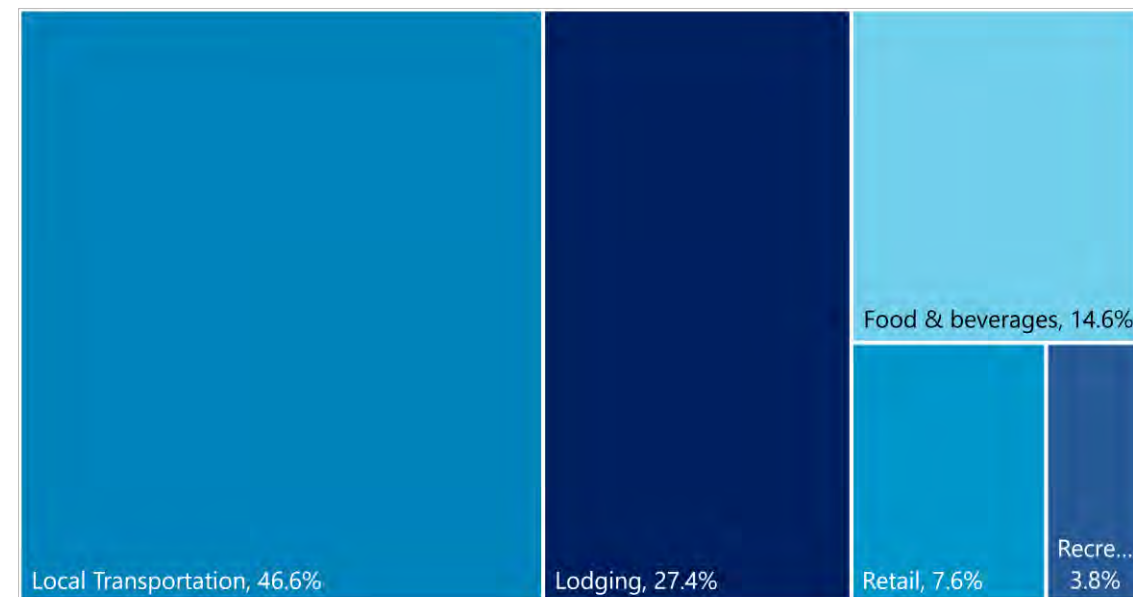
DOMESTIC OVERNIGHT BUSINESS SECTOR

Pennsylvania hosted an estimated 4.5 million overnight business person-trips in 2021 with associated spending of \$1.8 billion. With business meeting and convention travel returning during 2021, overnight business visitor spending increased 20%. This growth brings the domestic overnight business visitor spending back to 50% of 2019 levels.

As lodging and transportation experienced price increases in 2021, per-visitor spending in this sector grew to \$406.

Overnight business visitor spending, 2021

By category, share of \$



Sources: Longwoods International, Tourism Economics

DOMESTIC DAY LEISURE SECTOR

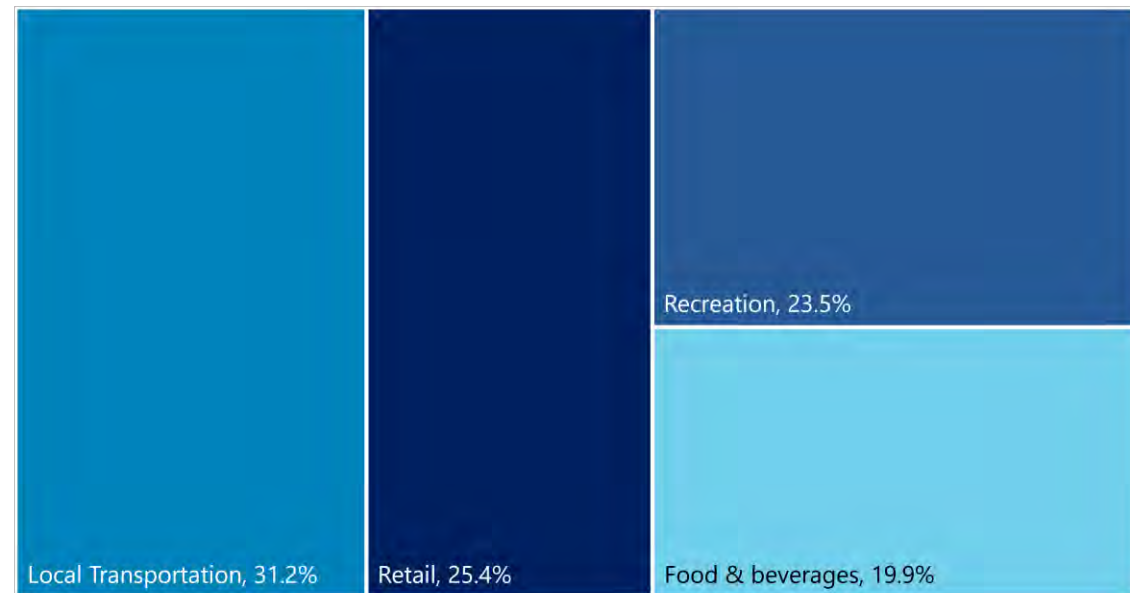
Pennsylvania hosted an estimated 113.6 million day leisure person-trips in 2021, an increase of nearly 15 million visitors. These visitors to destinations within PA spent \$15.6 billion, an increase of nearly a third.

Spending on transportation costs by these visitors was 31.2% in 2021, supported by increases in gasoline prices.

Each day leisure visitor spent an average of \$138 on their trip in 2021, a \$6.50 increase over 2020.

Day leisure visitor spending, 2021

By category, share of \$



Sources: Longwoods International, Tourism Economics

DOMESTIC DAY SECTOR

The number of day person-trips to PA destinations rose 12% to 120 million in 2021.

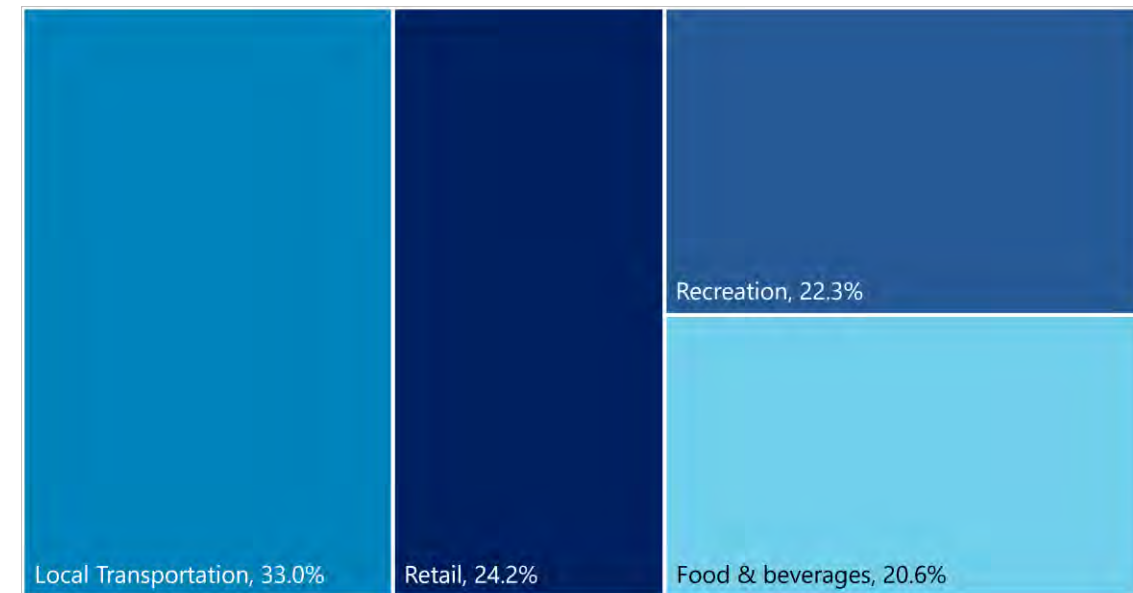
Day visitors to destinations within PA spent \$17.1 billion.

Each day visitor spent an average of \$143, up from \$135 in 2020.

As day travel remained resilient 2020 – suffering smaller declines than overnight travel during the pandemic – the increase in 2021 brings day travel spending to within 11% of pre-pandemic (2019) levels.

Day visitor spending, 2021

By category, share of \$



Sources: Longwoods International, Tourism Economics

DOMESTIC SPENDING CATEGORIES

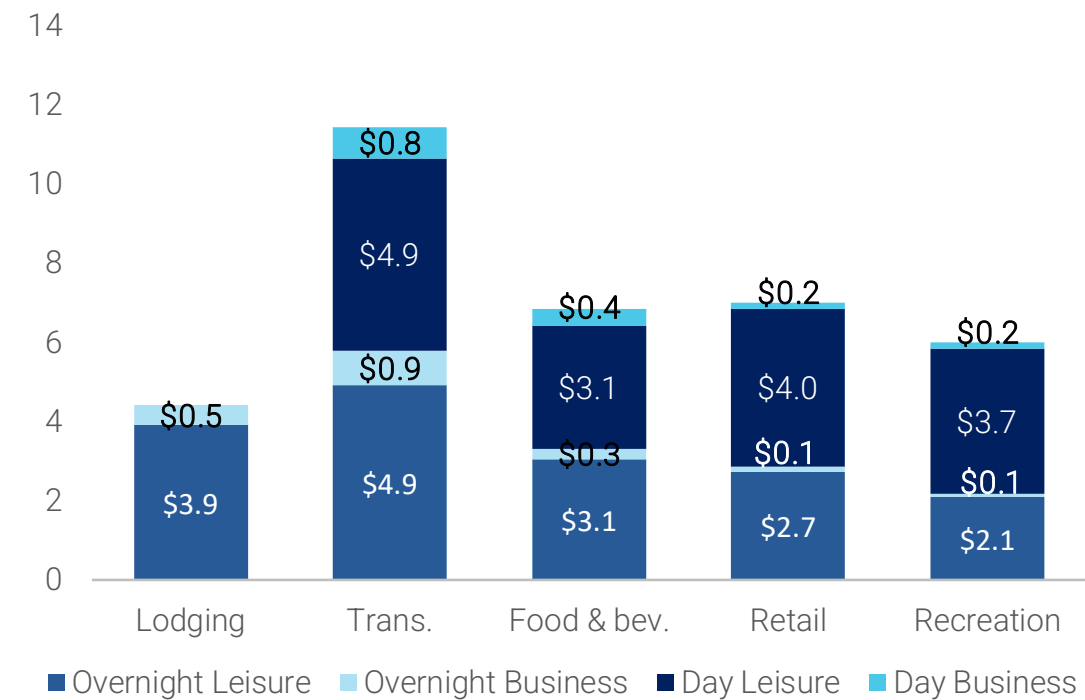
Focusing on domestic travel segments provides other examples of the shift in travel as overnight travel rebounds and leisure travel continues to drive overall spending results.

The overall leisure share of domestic visitor spending rose to 91% in 2021, compared to 87% in 2019 and 90% in 2020. The leisure retail share of spending grew to 95% in 2021 with as estimated \$6.7 billion of the total \$7.0 billion spent at clothing, electronic, sports, and other stores spent by leisure visitors.

Day leisure visitors supported the recovery in recreational spending. This segment contributed \$900 million of the \$1.7 billion increase.

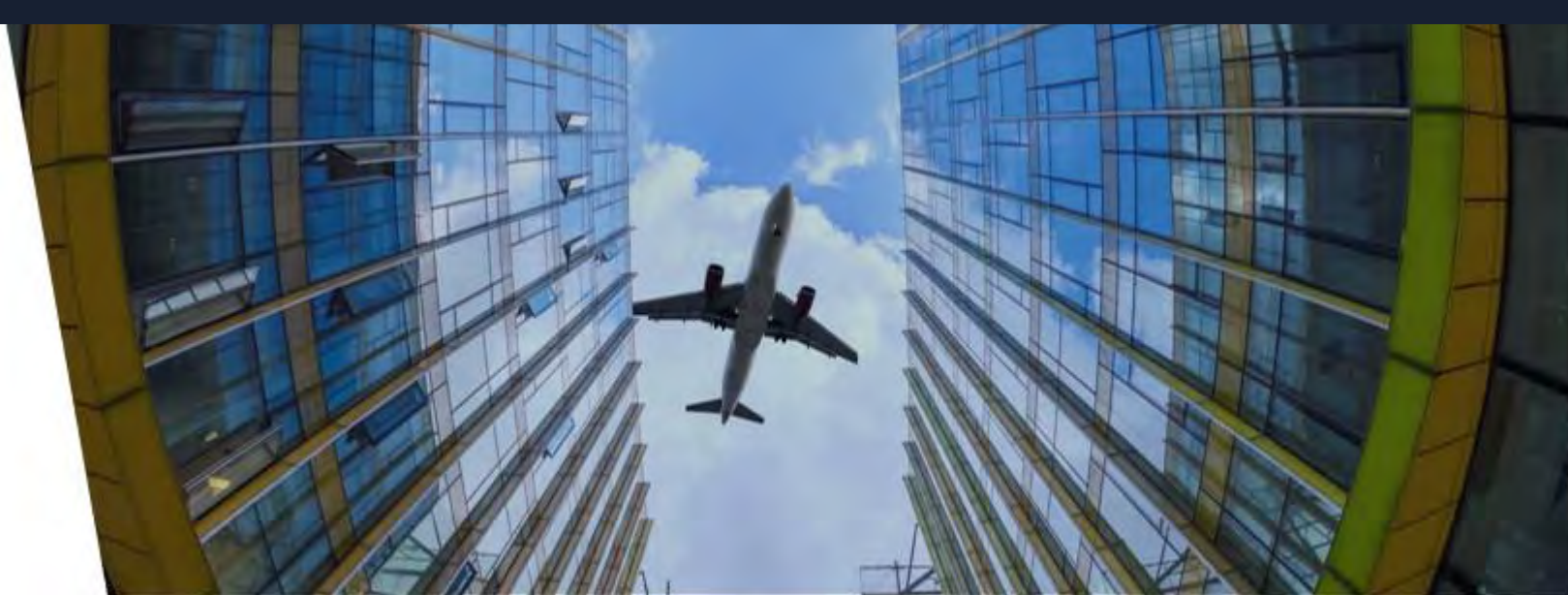
Pennsylvania domestic visitor spending, 2021

By category, \$ billions



Sources: Longwoods International, Tourism Economics





ECONOMIC IMPACT METHODOLOGY

The analysis of the Pennsylvania visitor economy begins with direct visitor spending and then analyzes the downstream effects of this spending on the broader economy. To determine total economic impact, we input direct spending 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 FRAMEWORK

DIRECT IMPACTS

Pennsylvania's tourism demand



RETAIL



ENTERTAINMENT/REC



FOOD & BEVERAGE



TRANSPORTATION



LODGING

INDIRECT IMPACTS

Purchases of inputs from suppliers



SUPPLY CHAIN EFFECTS



B2B GOODS & SERVICES PURCHASED

INDUCED IMPACTS

Consumption generated by household income impacts:



INCOME EFFECT



HOUSEHOLD CONSUMPTION

TOTAL IMPACTS

Direct, indirect, and induced impacts



SALES



GDP



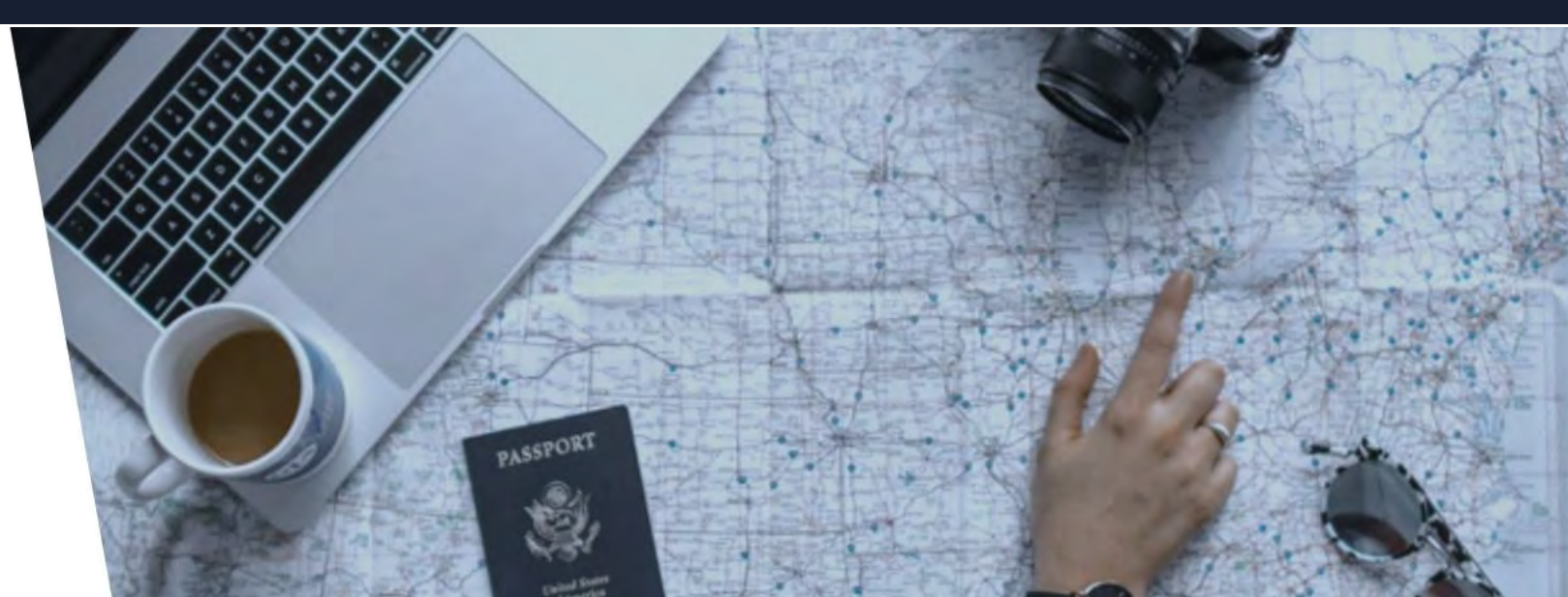
JOBS



INCOME



TAXES



ECONOMIC IMPACT FINDINGS

DIRECT IMPACTS

Employment supported by visitor activity rose 12.1% in 2021, rebounding to more than 282,000 jobs. The number of jobs jumped by nearly 30,500 in 2021. Despite the increase, the number of jobs directly supported by visitors remained 51,000 jobs below pre-pandemic levels.

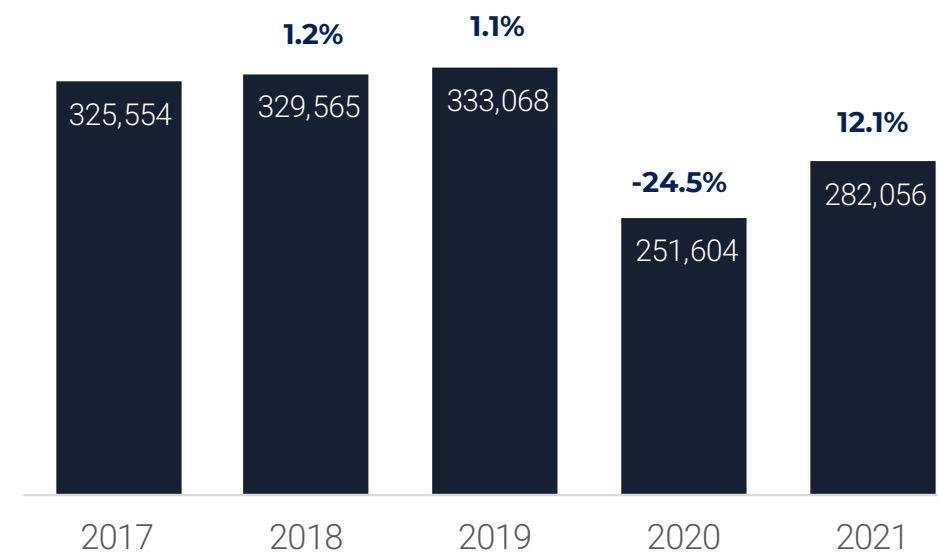
The rebound of visitor-supported jobs was less robust than the spending recovery, with visitor-supported employment levels rising 12% compared to 32% growth in spending in 2021.

If direct visitor-supported employment was treated as a single industry, it would rank 13th in comparison to all other sectors, just behind the education sector.

Tourism employment ranked 11th in 2019.

Visitor supported employment in Pennsylvania

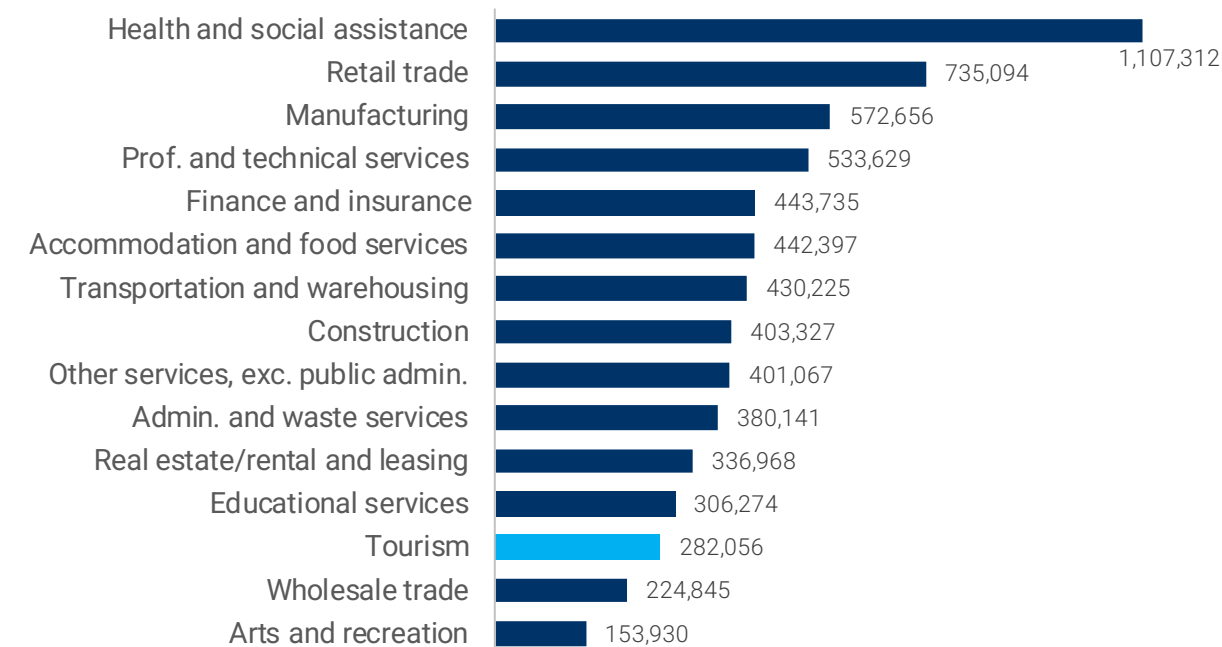
Amounts in number of jobs



Source: Tourism Economics

Employment in Pennsylvania, by major industry

Amounts in number of jobs



Source: Tourism Economics



ECONOMIC IMPACT FINDINGS

BUSINESS SALES IMPACTS

Spending on hotel rooms, restaurant meals, recreational activities and for shopping and transportation services by visitors reached \$38.0 billion in 2021. Adding in the investment and support of tourism by government resulted in a direct traveler demand of \$40.4 billion in 2021. This economic activity generated \$26 billion in indirect and induced impacts, resulting in a total economic impact of \$66.3 billion in the Pennsylvania economy, 20% more than a year earlier.

Visitor spending creates business activity across the economic spectrum. Significant benefits accrue in sectors like finance, insurance, and real estate, and business services. Companies that directly interact with visitors spent \$3.0 billion on business services like advertising, building services, and lawyers to support their visitor sales.

Summary economic impacts (2021)

Amounts in \$ billions



Source: Tourism Economics

Business sales impacts by industry (2021)

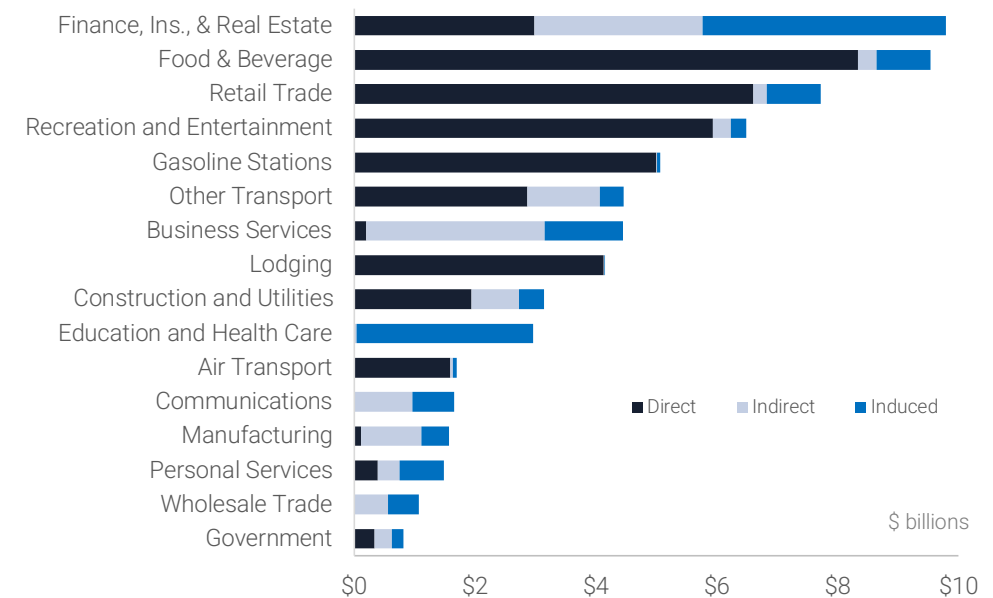
Amounts in \$ millions

	Direct Business Sales	Indirect Business Sales	Induced Business Sales	Total Business Sales
Total, all industries	\$40,407	\$12,008	\$13,880	\$66,294
Finance, Ins., & Real Estate	\$ 2,977	\$2,784	\$4,031	\$9,792
Food & Beverage	\$ 8,335	\$309	\$894	\$9,539
Retail Trade	\$ 6,606	\$222	\$892	\$7,721
Recreation and Entertainment	\$ 5,939	\$292	\$259	\$6,490
Gasoline Stations	\$ 4,994	\$19	\$47	\$5,060
Other Transport	\$ 2,867	\$1,197	\$394	\$4,458
Business Services	\$ 196	\$2,954	\$1,293	\$4,442
Lodging	\$ 4,133	\$8	\$11	\$4,152
Construction and Utilities	\$ 1,940	\$788	\$408	\$3,136
Education and Health Care	-	\$35	\$2,927	\$2,962
Air Transport	\$ 1,585	\$49	\$64	\$1,697
Communications	-	\$964	\$691	\$1,655
Manufacturing	\$ 114	\$993	\$461	\$1,567
Personal Services	\$ 392	\$355	\$734	\$1,481
Wholesale Trade	-	\$557	\$509	\$1,065
Government	\$ 330	\$287	\$194	\$810
Agriculture, Fishing, Mining	-	\$195	\$72	\$267

Source: Tourism Economics

Visitor economy business sales impacts by industry (2021)

Amounts in \$ billions



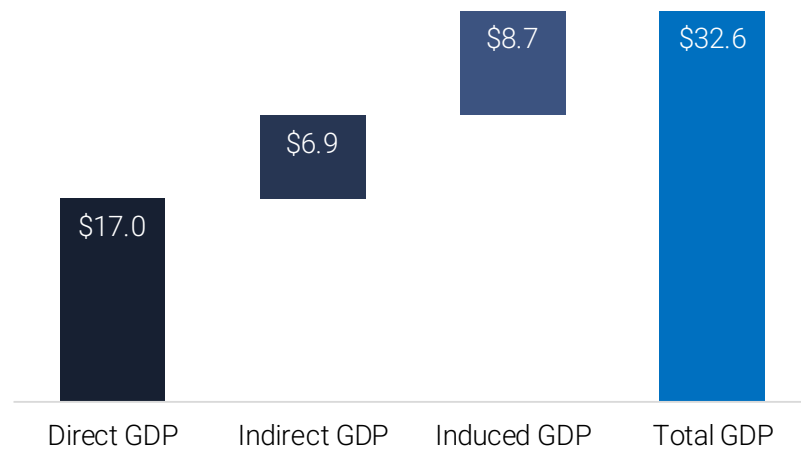
Source: Tourism Economics

VALUE ADDED IMPACTS

The value of all visitor-supported goods & services produced in Pennsylvania in 2021 for Pennsylvania visitors was \$32.6 billion, 4.2% of the Pennsylvania economy.

Summary value-added impacts (2021)

Amounts in \$ billions



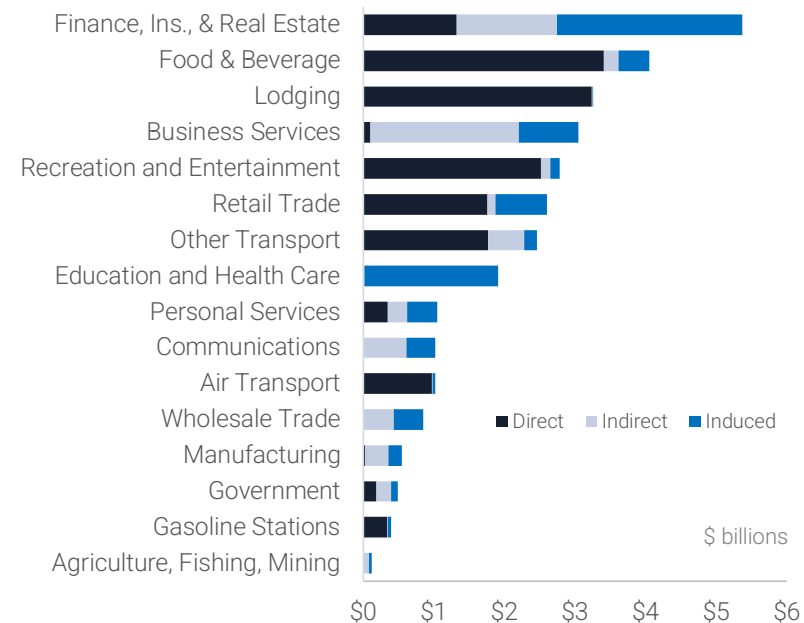
Source: Tourism Economics

The locally produced portion of visitor-supported sales in the finance & real estate industry added \$5.4 billion to state GDP in 2021.

Spending by travel demand-supported workers supported \$1.9 billion in GDP contribution in the education and health care industries, showing how tourism activity supports businesses across the industrial spectrum.

Visitor value-added impacts by Industry (2021)

Amounts in \$ billions



Source: Tourism Economics



Summary value-added impacts by industry (2021)

Amounts in \$ millions

Industry	Direct GDP	Indirect GDP	Induced GDP	Total GDP
Total, all industries	\$ 16,956	\$ 6,919	\$ 8,713	\$ 32,589
Finance, Ins., & Real Estate	\$ 1,325	\$ 1,423	\$ 2,620	\$ 5,367
Food & Beverage	\$ 3,412	\$ 207	\$ 431	\$ 4,050
Lodging	\$ 3,241	\$ 6	\$ 8	\$ 3,255
Business Services	\$ 99	\$ 2,105	\$ 843	\$ 3,047
Recreation and Entertainment	\$ 2,520	\$ 129	\$ 131	\$ 2,780
Retail Trade	\$ 1,758	\$ 118	\$ 731	\$ 2,608
Other Transport	\$ 1,772	\$ 508	\$ 183	\$ 2,463
Education and Health Care	-	\$ 19	\$ 1,894	\$ 1,913
Construction and Utilities	\$ 965	\$ 440	\$ 225	\$ 1,630
Personal Services	\$ 343	\$ 280	\$ 428	\$ 1,051
Communications	-	\$ 611	\$ 409	\$ 1,021
Air Transport	\$ 974	\$ 11	\$ 30	\$ 1,016
Wholesale Trade	-	\$ 431	\$ 417	\$ 848
Manufacturing	\$ 25	\$ 333	\$ 187	\$ 545
Government	\$ 184	\$ 208	\$ 96	\$ 488
Gasoline Stations	\$ 338	\$ 10	\$ 45	\$ 393
Agriculture, Fishing, Mining	-	\$ 81	\$ 35	\$ 115

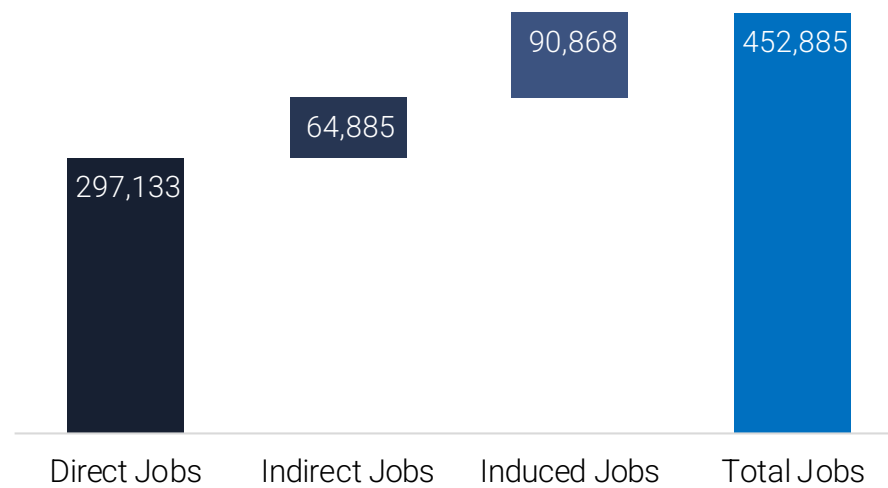
Source: Tourism Economics

EMPLOYMENT IMPACTS

Visitor activity supported a total of 452,885 jobs in 2021, including 297,133 direct jobs and 155,753 jobs supported through indirect and induced impacts. This equates to 1-in-17 jobs in Pennsylvania.

Summary employment impacts (2021)

Amounts in number of jobs



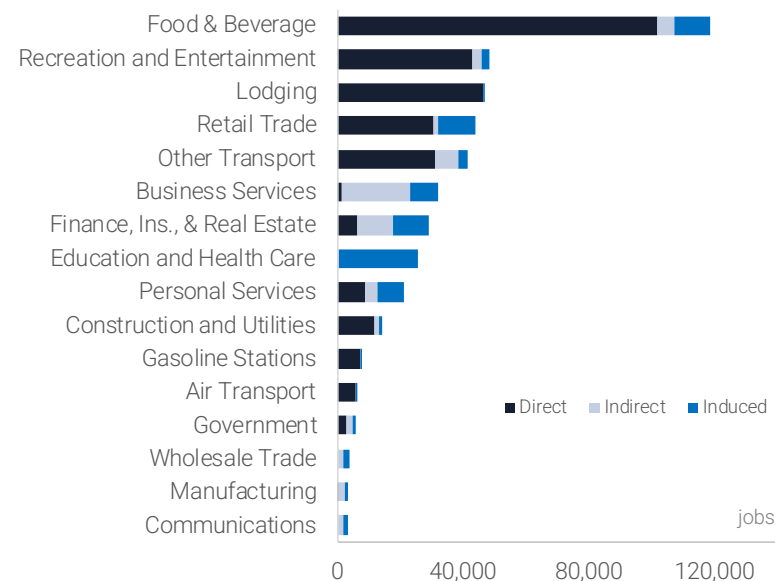
Source: Tourism Economics

With tourism a labor-intensive industry, more of the employment impact is directly from visitor activity, pushing those industries rankings up. Ranking 1st, visitor spending supports the largest number of jobs in the food & beverage industry, nearly 120,000.

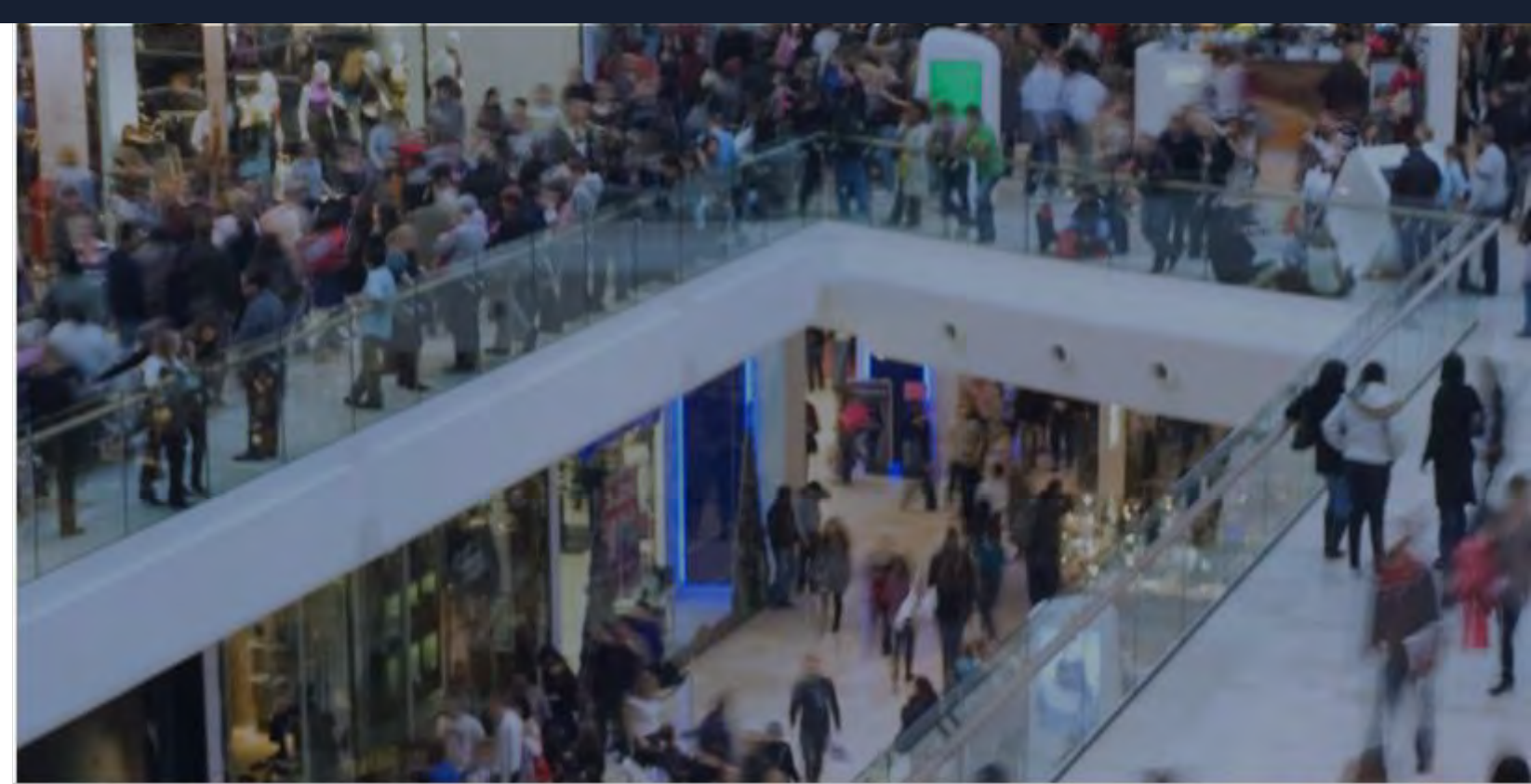
Spending by tourism-supported workers supports 24,977 jobs in education and health care businesses.

Visitor job Impacts by industry (2021)

Amounts in number of jobs



Source: Tourism Economics



Summary employment Impacts by industry (2021)

Amounts in number of jobs

	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Total, all industries	297,133	64,885	90,868	452,885
Food & Beverage	101,696	5,499	11,424	118,619
Recreation and Entertainment	43,100	2,700	2,613	48,413
Lodging	46,275	60	94	46,429
Retail Trade	30,627	1,595	11,885	44,106
Other Transport	31,085	7,420	3,181	41,687
Business Services	1,194	22,129	8,841	32,164
Finance, Ins., & Real Estate	6,420	11,268	11,295	28,982
Education and Health Care	-	432	24,977	25,408
Personal Services	8,926	3,595	8,645	21,166
Construction and Utilities	11,754	1,553	1,005	14,311
Gasoline Stations	7,061	151	666	7,879
Air Transport	5,672	101	166	5,939
Government	3,061	1,756	1,095	5,912
Wholesale Trade	-	1,938	2,060	3,998
Manufacturing	262	2,062	1,181	3,505
Communications	-	2,001	1,263	3,264
Agriculture, Fishing, Mining	-	625	478	1,104

Source: Tourism Economics

LABOR INCOME IMPACTS

Visitor activity generated \$12.1 billion in direct labor income and a total of \$21.5 billion when including indirect and induced impacts. Total tourism-generated income in Pennsylvania in 2021 rebounded 14% above 2020, \$2.6 billion more in income to Pennsylvania households.

Summary labor income impacts (2021)

Amounts in \$ billions

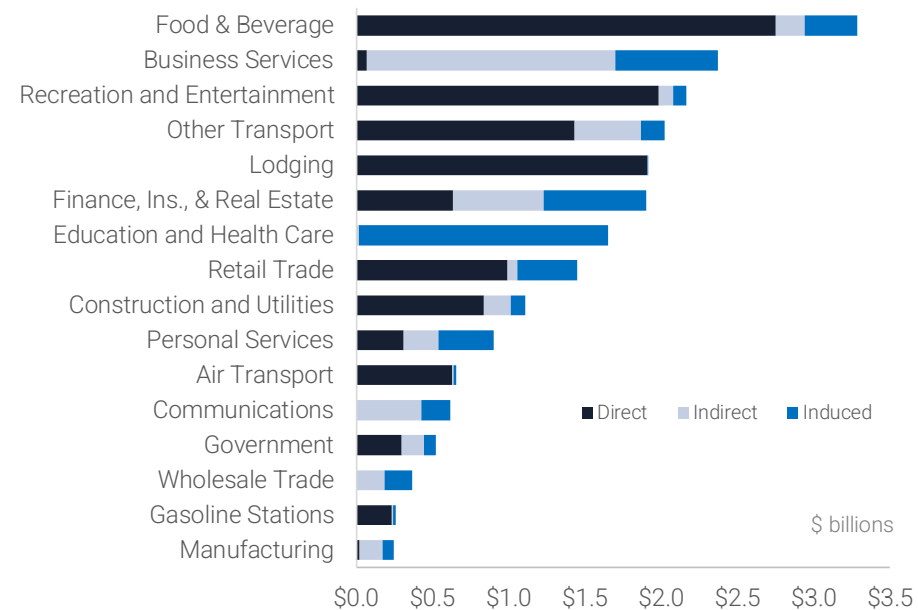


Source: Tourism Economics

There are nine industries in which visitor activity supports more than \$1 billion in personal income. These range from the obvious—food & beverage and lodging, to the less obvious—business services and construction.

Visitor labor income Impacts by industry (2021)

Amounts in \$ billions



Source: Tourism Economics



Summary labor income impacts (2021)

Amounts in \$ millions

	Direct Labor Income	Indirect Labor Income	Induced Labor Income	Total Labor Income
Total, all industries	\$12,094	\$4,384	\$4,987	\$21,465
Food & Beverage	\$ 2,752	\$186	\$345	\$3,284
Business Services	\$ 69	\$1,628	\$674	\$2,371
Recreation and Entertainment	\$ 1,985	\$94	\$82	\$2,162
Other Transport	\$ 1,432	\$434	\$154	\$2,020
Lodging	\$ 1,909	\$2	\$4	\$1,915
Finance, Ins., & Real Estate	\$ 632	\$596	\$674	\$1,902
Education and Health Care	-	\$18	\$1,633	\$1,651
Retail Trade	\$ 989	\$66	\$392	\$1,448
Construction and Utilities	\$ 837	\$176	\$93	\$1,107
Personal Services	\$ 311	\$226	\$365	\$902
Air Transport	\$ 628	\$11	\$16	\$655
Communications	-	\$427	\$189	\$615
Government	\$ 295	\$150	\$76	\$520
Wholesale Trade	-	\$184	\$180	\$364
Gasoline Stations	\$ 234	\$5	\$21	\$260
Manufacturing	\$ 20	\$152	\$75	\$247
Agriculture, Fishing, Mining	-	\$29	\$14	\$43

Source: Tourism Economics

ECONOMIC IMPACT FINDINGS

FISCAL (TAX) IMPACTS

Visitor spending, supporting jobs, income, and business sales, generated \$8.8 billion in government revenues.

State and local taxes alone tallied \$4.2 billion in 2021, increasing by \$614 million.

Each household in Pennsylvania would need to be taxed an additional \$802 to replace the visitor-generated taxes generated by visitor activity in Pennsylvania and received by state and local governments in 2021.

Fiscal (tax) impacts

Amounts in \$ millions

	2017	2018	2019	2020	2021	2021 Growth
Total Tax Revenues	\$9,318.0	\$9,657.5	\$10,046.1	\$7,649.9	\$8,808.5	15.1%
Federal Taxes	\$4,801.1	\$5,012.9	\$5,235.4	\$4,070.5	\$4,615.0	13.4%
Personal Income	\$1,453.5	\$1,539.5	\$1,608.0	\$1,278.3	\$1,533.1	19.9%
Corporate	\$501.1	\$548.6	\$572.7	\$397.8	\$398.9	0.3%
Indirect Business	\$414.6	\$421.5	\$440.0	\$341.0	\$370.9	8.8%
Social Insurance	\$2,431.9	\$2,503.2	\$2,614.6	\$2,053.4	\$2,312.0	12.6%
State and Local Taxes	\$4,516.9	\$4,644.7	\$4,810.7	\$3,579.4	\$4,193.5	17.2%
Sales	\$1,650.1	\$1,697.2	\$1,742.6	\$1,142.6	\$1,501.7	31.4%
Bed Tax	\$200.2	\$217.8	\$228.6	\$107.8	\$179.0	66.0%
Personal Income	\$455.7	\$481.1	\$493.4	\$411.3	\$470.5	14.4%
Corporate	\$254.3	\$235.1	\$246.0	\$168.7	\$171.4	1.6%
Social Insurance	\$35.9	\$34.6	\$36.1	\$24.3	\$23.6	-2.7%
Excise and Fees	\$570.3	\$554.8	\$579.2	\$414.3	\$422.2	1.9%
Property	\$1,350.4	\$1,424.1	\$1,484.8	\$1,310.5	\$1,425.1	8.7%

Source: Tourism Economics

Tourism-supported revenues to state government rose to \$2.2 billion in 2021. The majority of state revenues are from sales taxes with income, corporate, and excise and fees from visitor activity together adding \$750 million to state coffers. State revenues grew by \$360 million with sales tax growth driving the increase.

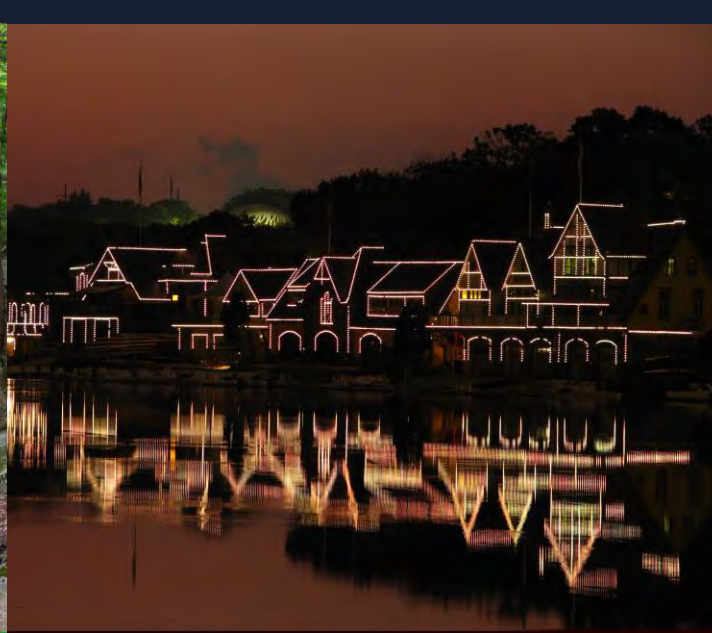
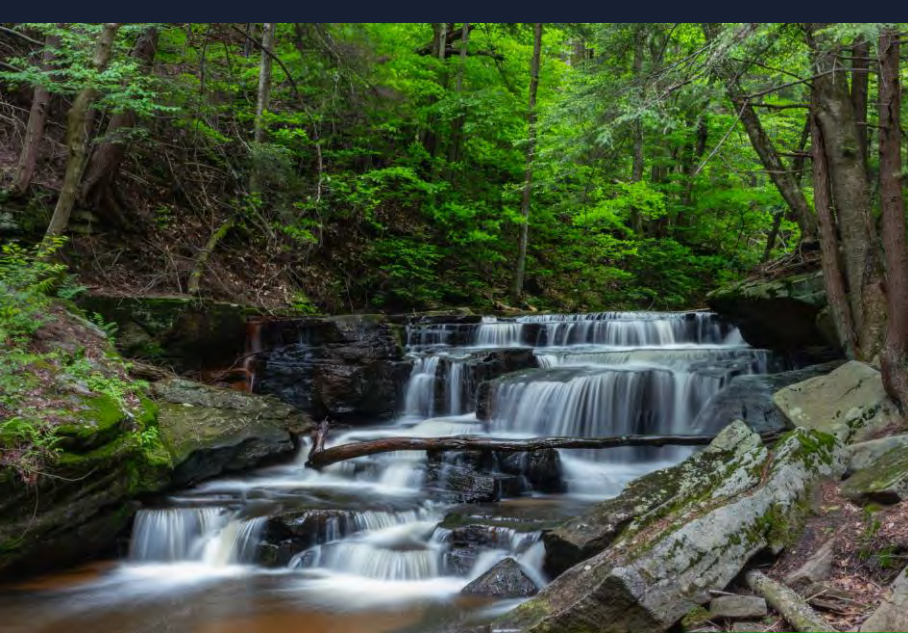
Local tax revenues from visitor activity rose to \$2.0 billion with property taxes, bed taxes, fees, and income taxes supporting local governmental revenues. Local revenues grew by \$250 million, supported in part by \$70 million growth in bed taxes.

Fiscal (tax) impacts

Amounts in \$ millions

	2019	2020	2021
State Taxes	\$2,567.2	\$1,793.1	\$2,153.8
Sales	\$1,617.2	\$1,066.8	\$1,378.0
Bed Tax	\$0.0	\$0.0	\$0.0
Personal Income	\$351.4	\$292.9	\$336.2
Corporate	\$246.0	\$168.7	\$171.4
Social Insurance	\$36.1	\$24.3	\$23.6
Excise and Fees	\$313.2	\$237.4	\$242.0
Property	\$3.3	\$2.9	\$2.6
Local Taxes	\$2,243.5	\$1,786.3	\$2,039.7
Sales	\$125.4	\$75.8	\$123.7
Bed Tax	\$228.6	\$107.8	\$179.0
Personal Income	\$142.0	\$118.4	\$134.3
Corporate	\$0.0	\$0.0	\$0.0
Social Insurance	\$0.0	\$0.0	\$0.0
Excise and Fees	\$266.0	\$176.8	\$180.2
Property	\$1,481.4	\$1,307.6	\$1,422.4

Source: Tourism Economics



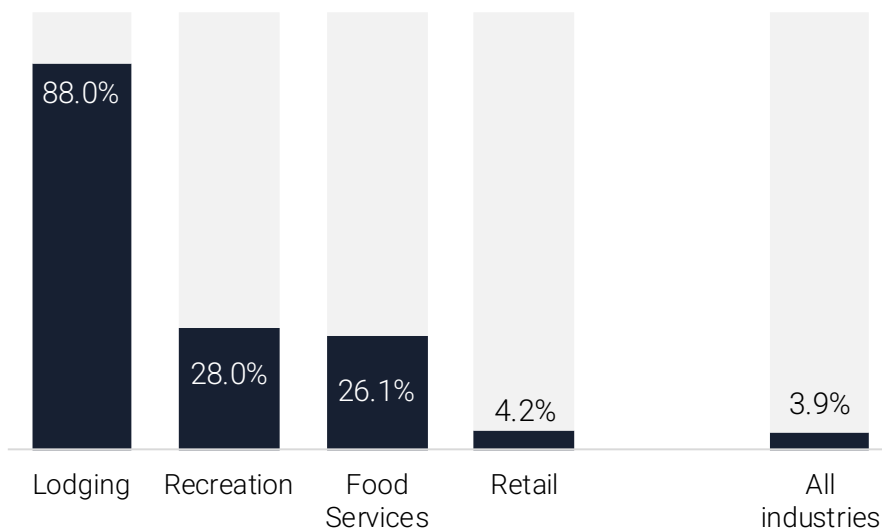
ECONOMIC IMPACTS IN CONTEXT

Visitor activity supports a significant share of employment in several industries with 88% of lodging employment visitor-related. Visitor activity employs 28% of jobs in recreational industries and 26% of all restaurant employment.

Overall, tourism jobs accounted for 3.9% of all jobs in Pennsylvania in 2021. As the travel recovery continues to gather force, the share of employment supported by visitors is expected to rise.

Visitor employment intensity

Direct jobs, visitor-supported share of industry employment



Source: BEA, BLS, Tourism Economics

ECONOMIC IMPACTS IN CONTEXT



\$38.0B VISITOR SPENDING

Is 1.8 times larger than the contribution of Penn – both the university and hospital – to the state (\$21.5 billion).



\$9.1B VISITOR SPENDING INCREASE

The \$9.1 billion increase in visitor spending is six times larger than the total estimated cost of construction of the UPMC Presbyterian hospital project (1.5 billion).



452,885 JOBS

The number of jobs supported by traveler demand is nearly equal in size to the population of York County, the 8th largest county in Pennsylvania.



\$4.2B STATE & LOCAL TAXES

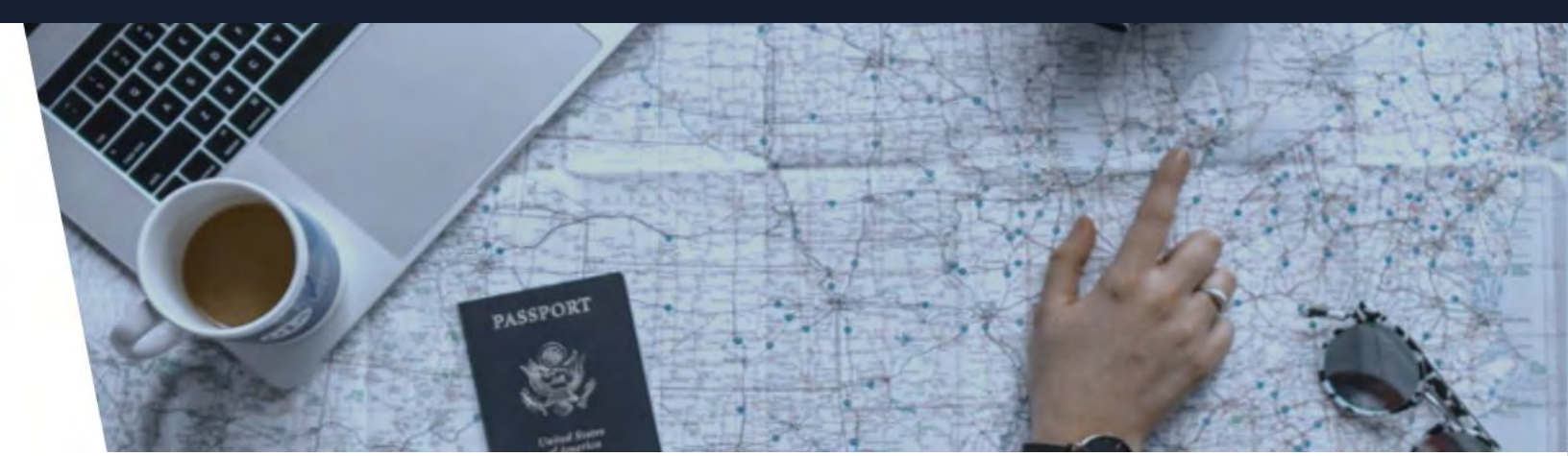
Each household in Pennsylvania would need to be taxed an additional \$802 to replace the visitor taxes received by the state and local governments in 2021 - nearly enough to cover the average American's holiday spending (\$837).



TOURISM
ECONOMICS

AN OXFORD ECONOMICS COMPANY

County Analysis, 2021

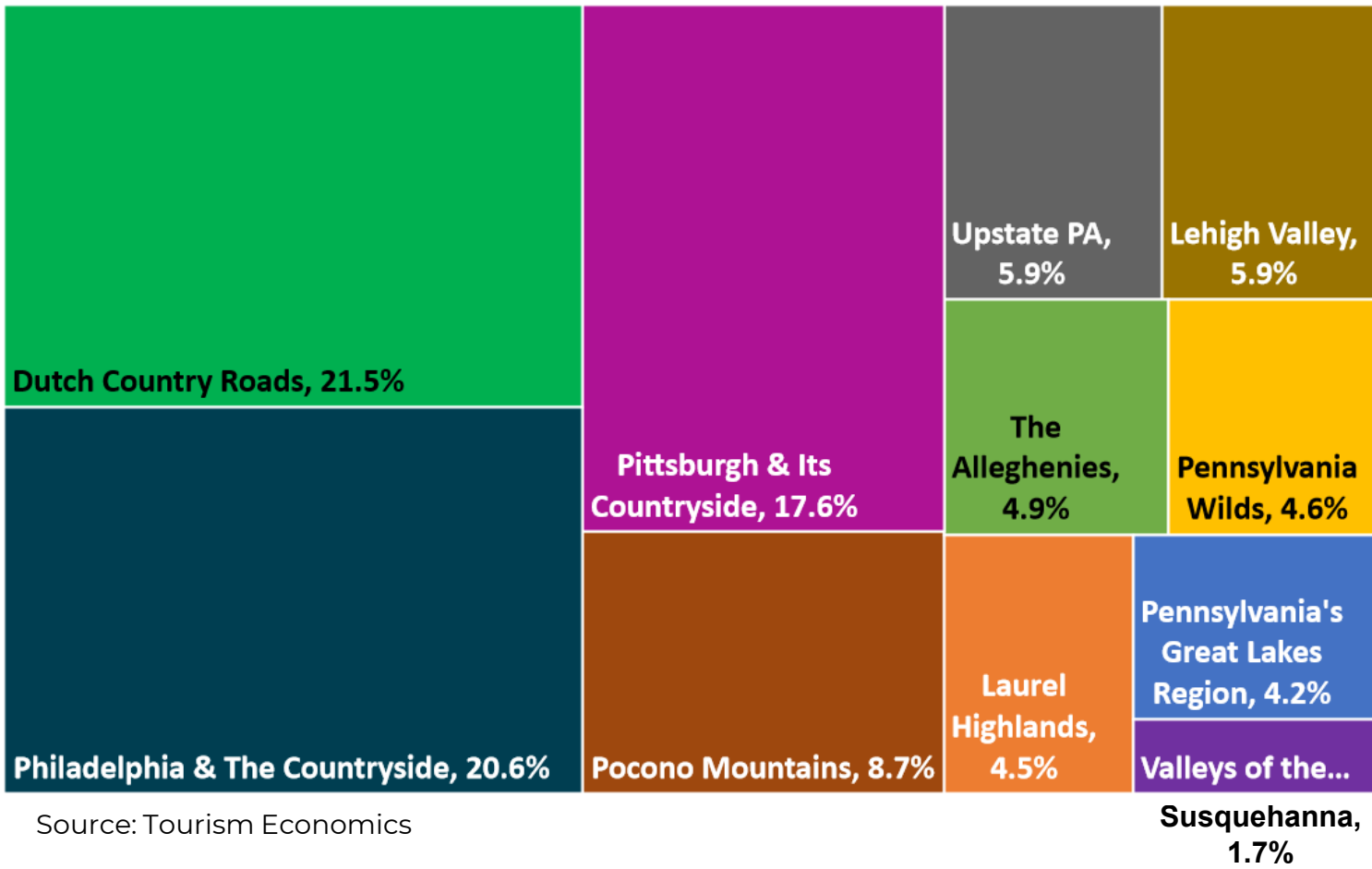


PENNSYLVANIA TOURISM REGIONS VISITOR SPENDING

PENNSYLVANIA TOURISM REGIONS VISITOR SPENDING

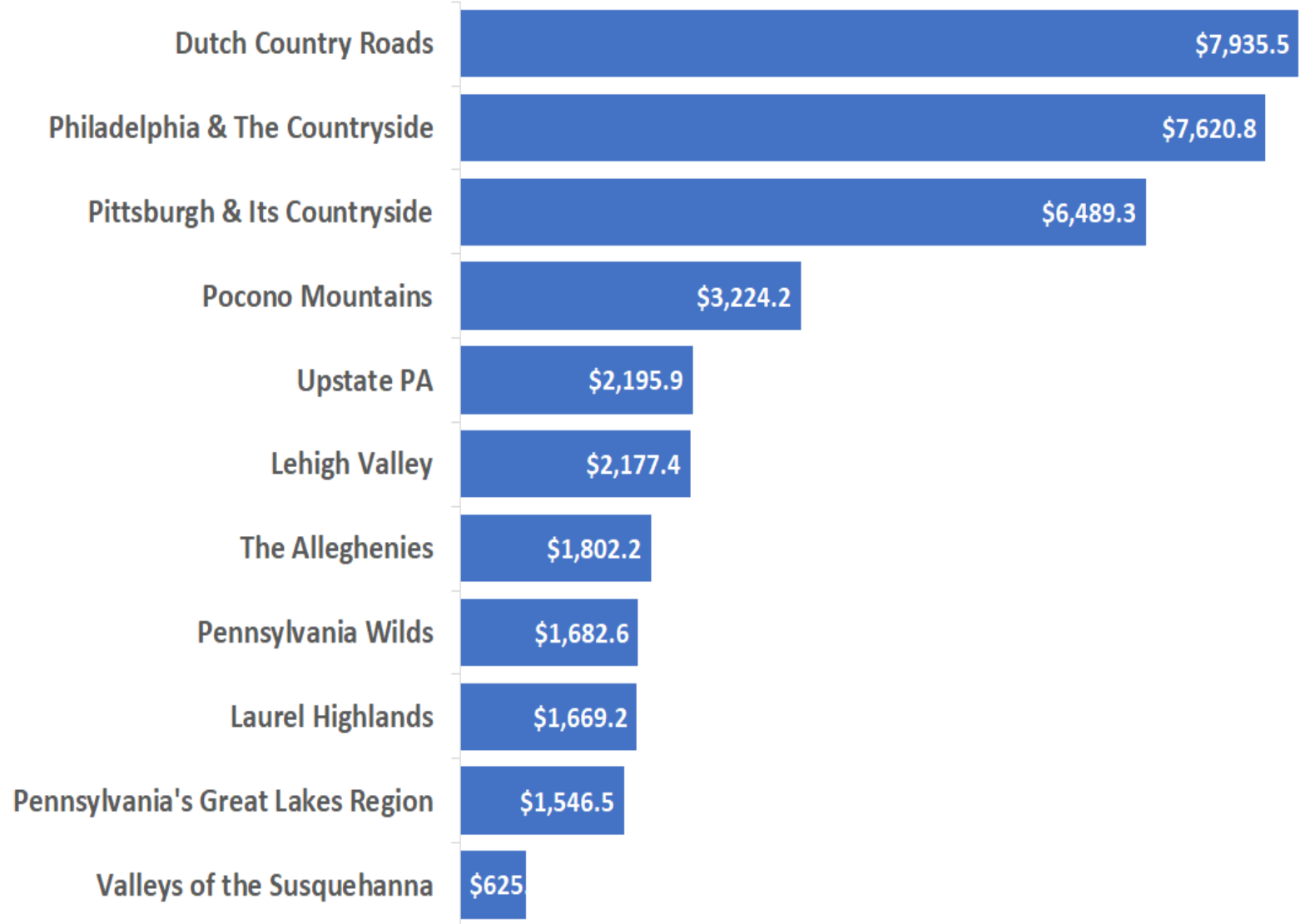
The Philadelphia and The Countryside, Dutch Country Roads, and Pittsburgh and Its Countryside regions together accounted for 60% of visitor spending in PA in 2021; but every region (and county) benefited from the infusion of travel-related dollars into their economies.

Tourism Regions Share of Visitor Spending, 2021



Source: Tourism Economics

Visitor Spending By Region, 2021
Amounts in \$millions



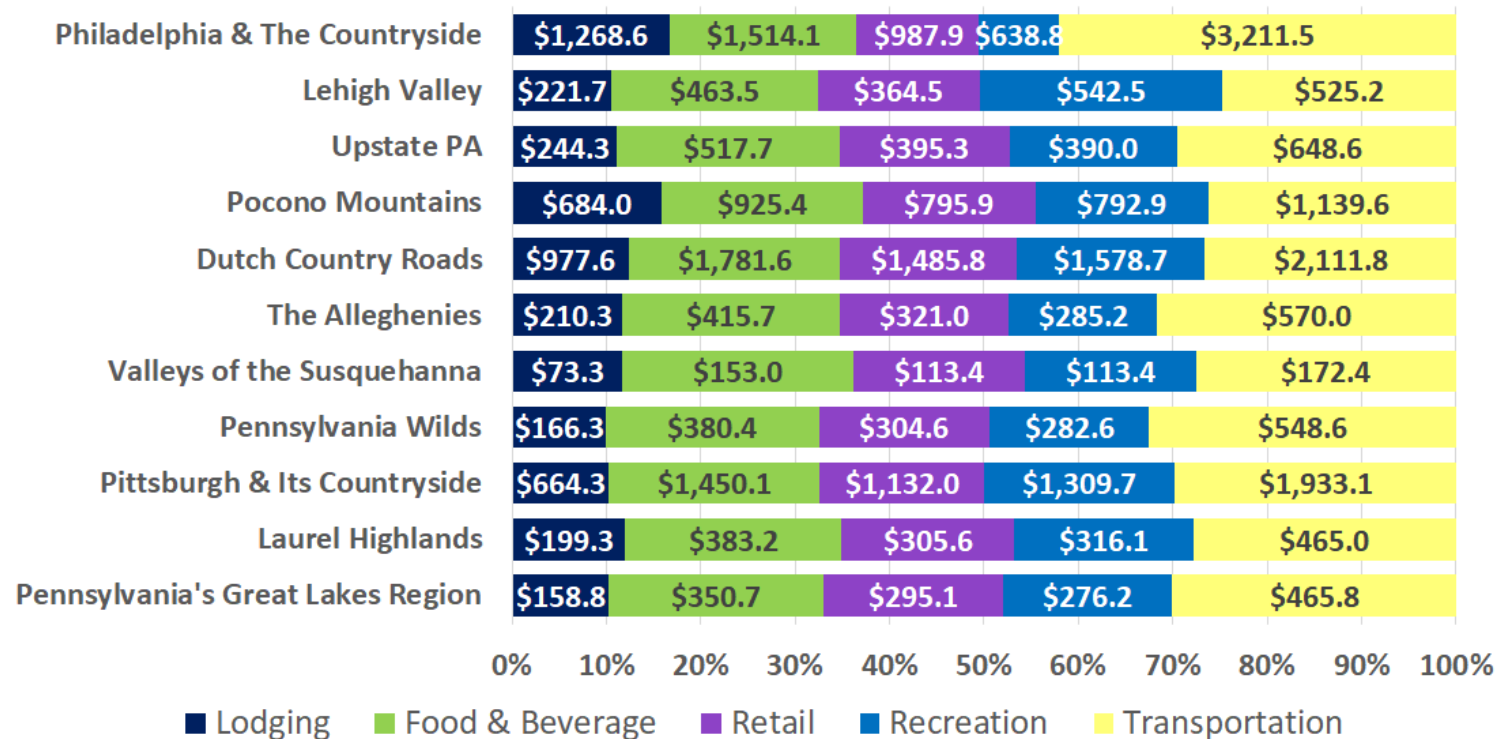
Source: Tourism Economics

PENNSYLVANIA TOURISM REGIONS VISITOR SPENDING

Visitors to the Philadelphia and The Countryside region spent the largest shares of their travel budgets on lodging and transportation relative to travelers to the other tourism regions, while travelers to the Lehigh Valley region devoted the largest portion of their travel budgets to recreation.

Visitor Spending By Category By Region, 2021

Amounts in \$millions, Percent of region total



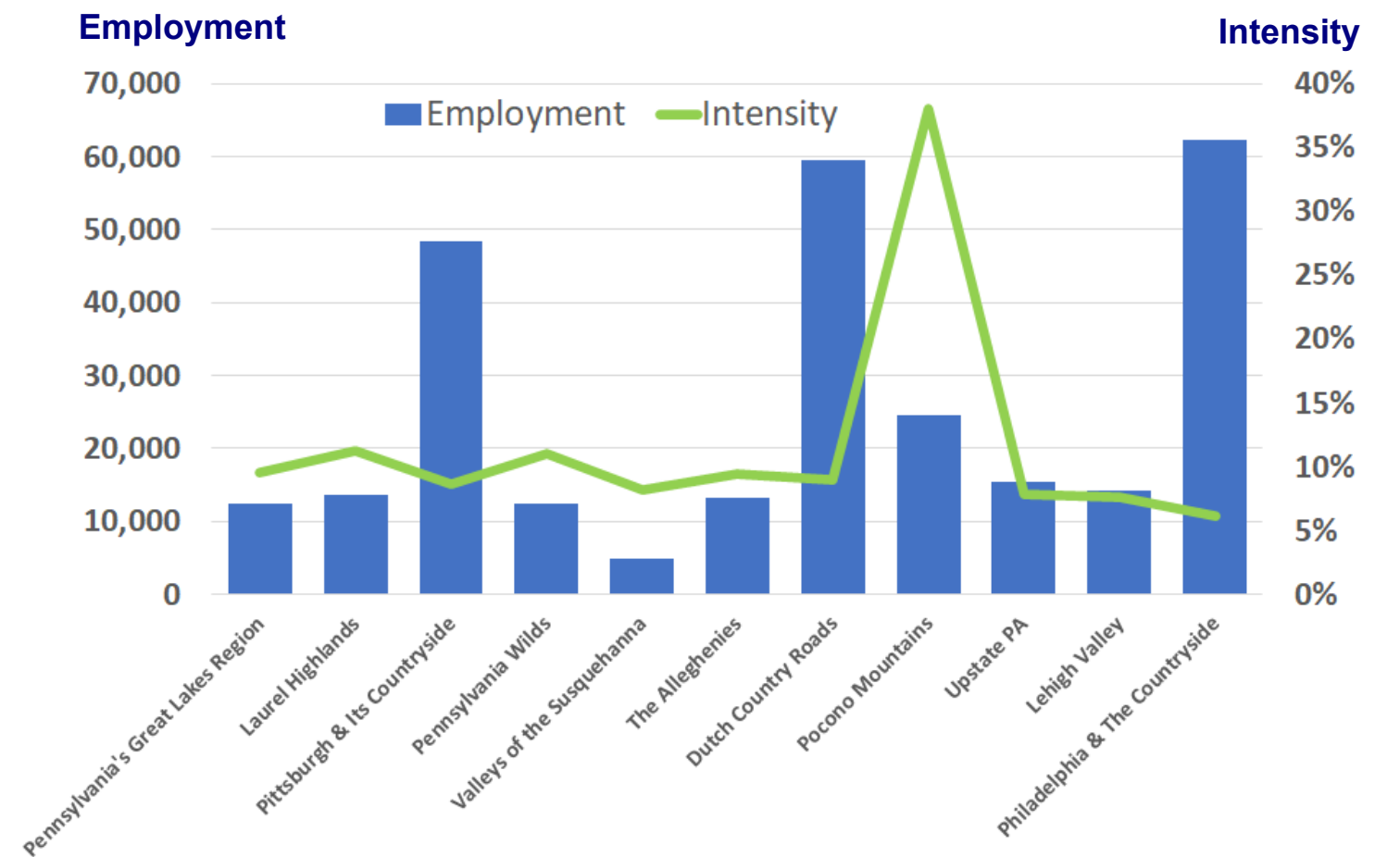
Source: Tourism Economics

PENNSYLVANIA TOURISM REGIONS EMPLOYMENT

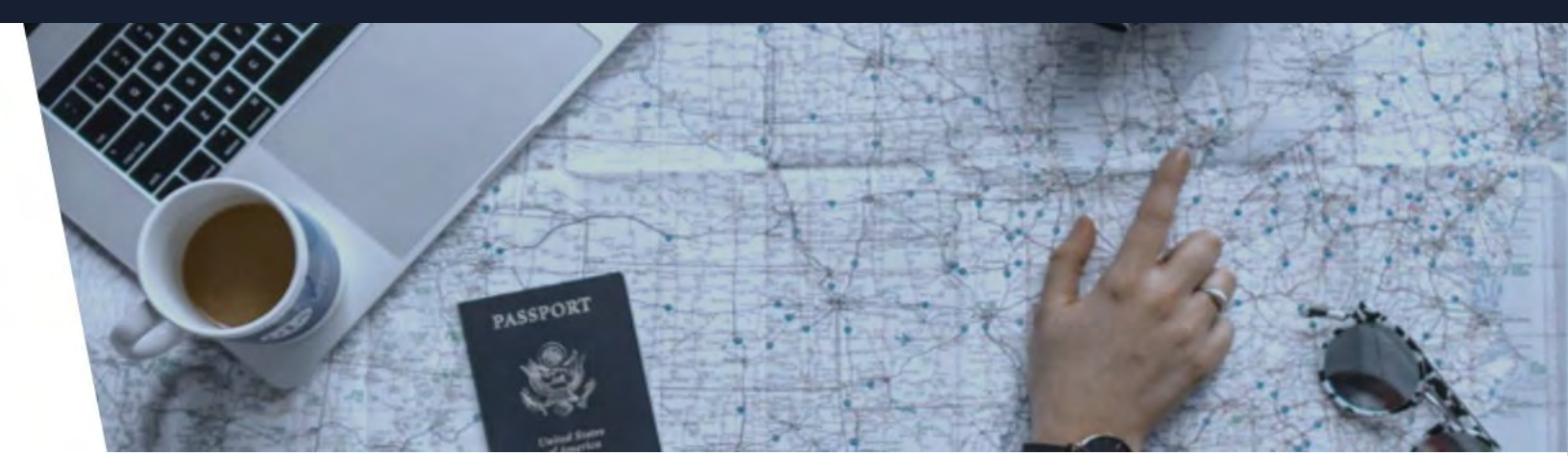
As in pre-pandemic years, the Pocono Mountains region had the largest percentage of its total workforce employed in travel and tourism-related jobs, while the Philadelphia and The Countryside region, with its highly diversified economy, had the smallest share of workers employed in travel- and tourism-related jobs, but the largest number.

Travel and Tourism-Related Employment and Intensity, 2021

Intensity reflects travel and tourism-related jobs share of total employment



Source: Tourism Economics



PENNSYLVANIA'S GREAT LAKES REGION VISITOR SPENDING

Visitor Spending rose 26% in Pennsylvania's Great Lakes Region in 2021, but remained 11% below its 2019 pre-pandemic level.

Visitor Spending By Category, 2020 & 2021

Amounts in \$millions, % change 2020-2021

By County, 2021	Lodging	Food & beverages	Retail	Recreation	Transportation	Total
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
Region Total	\$158.8	\$350.7	\$295.1	\$276.2	\$465.8	\$1,546.5
% Change	31.4%	15.5%	21.0%	29.9%	34.3%	25.9%
By County, 2020						
Crawford	\$10.4	\$46.9	\$33.7	\$25.2	\$61.0	\$177.3
Erie	\$82.3	\$181.5	\$143.7	\$139.1	\$186.6	\$733.1
Mercer	\$22.1	\$56.3	\$50.2	\$35.8	\$56.8	\$221.2
Venango	\$6.1	\$19.0	\$16.3	\$12.6	\$42.5	\$96.5
Region Total	\$120.8	\$303.7	\$243.9	\$212.7	\$346.9	\$1,228.1

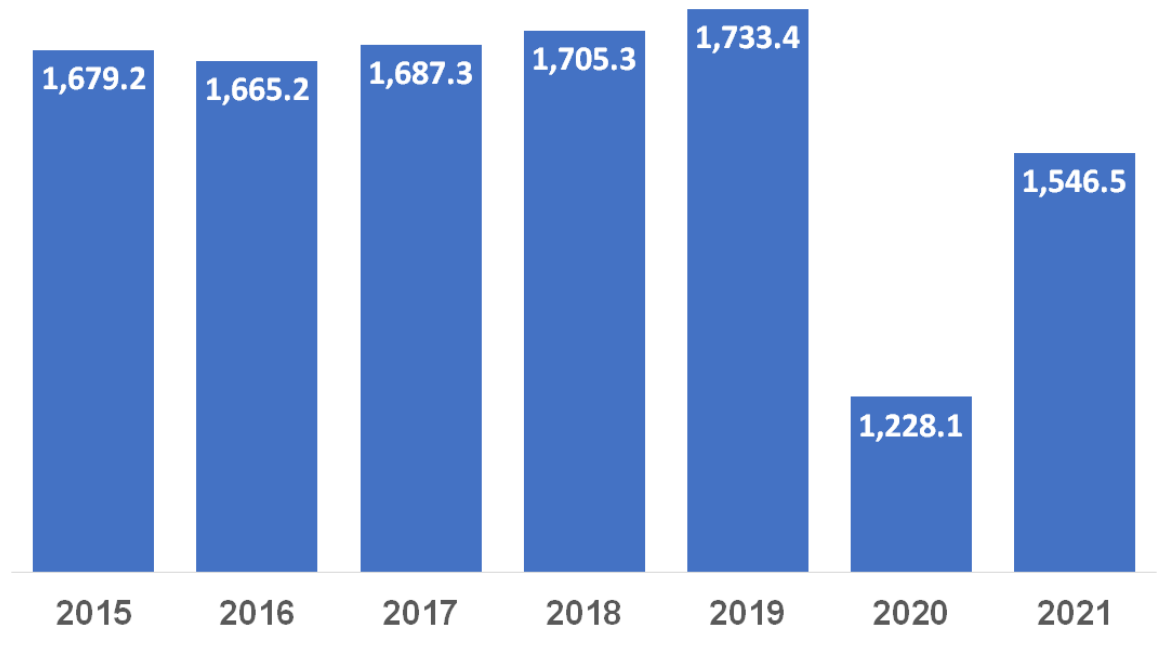
Lodging includes spending at/on second homes.

Transportation includes both ground and air transportation.

Source: STR, County room tax revenues, PA Department of Revenue, Tourism Economics

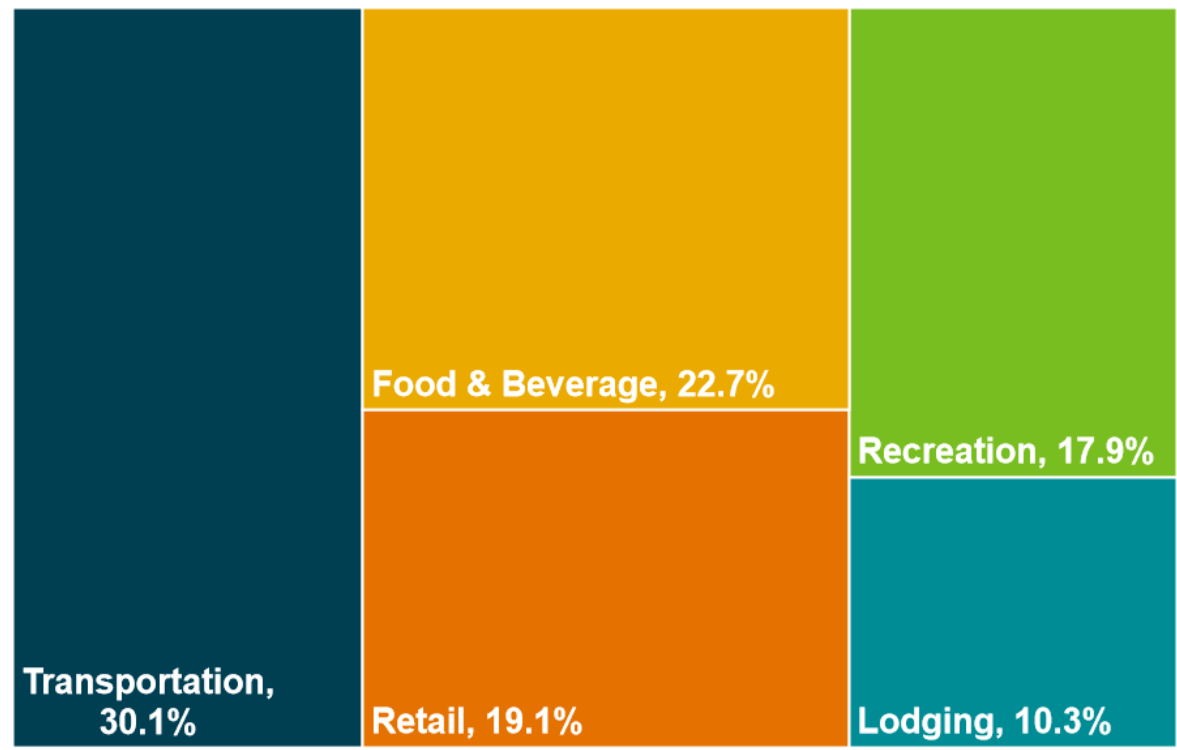
PENNSYLVANIA'S GREAT LAKES REGION VISITOR SPENDING, 2015-2021

Amounts in \$millions



VISITOR SPENDING BY CATEGORY, 2021

Percent of total



Source: Tourism Economics

PENNSYLVANIA'S GREAT LAKES REGION ECONOMIC IMPACTS

Tourism Satellite Account - Demand Measures, 2020 & 2021

Amounts in \$millions, % change 2020-2021

By County, 2021	Visitor Spending	Government	Investment/ PCE	Total Tourism Demand
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
Region Total	\$1,546.5	\$8.9	\$88.7	\$1,644.1
% Change	25.9%	48.5%	0.4%	24.3%
By County, 2020				
Crawford	\$177.3	\$0.6	\$13.5	\$191.4
Erie	\$733.1	\$4.2	\$51.9	\$789.2
Mercer	\$221.2	\$0.9	\$15.7	\$237.8
Venango	\$96.5	\$0.3	\$7.3	\$104.0
Region Total	\$1,228.1	\$6.0	\$88.4	\$1,322.4

Source: Tourism Economics

Travel & Tourism Industry (direct) Impacts, 2020 & 2021

Amounts in \$millions, except employment (in units), % change 2020-2021

By County, 2021	Visitor Spend	Employment	Labor Income	Taxes State/Local	Federal
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
Region Total	\$1,546.5	12,400	\$366.9	\$83.3	\$92.8
% Change	25.9%	12.5%	21.6%	18.0%	13.0%
By County, 2020					
Crawford	\$177.3	1,738	\$44.4	\$10.0	\$12.0
Erie	\$733.1	6,161	\$179.8	\$42.8	\$49.0
Mercer	\$221.2	2,052	\$51.3	\$12.3	\$14.3
Venango	\$96.5	1,066	\$26.3	\$5.6	\$6.9
Region Total	\$1,228.1	11,018	\$301.8	\$70.6	\$82.1

Travel & Tourism Economy (total) Impacts, 2020 & 2021

Amounts in \$millions, except employment (in units), % change 2020-2021

By County, 2021	Visitor Spend	Employment	Labor Income	Taxes State/Local	Federal
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
Region Total	\$1,644.1	19,340	\$692.3	\$157.3	\$166.4
% Change	24.3%	9.9%	15.5%	16.2%	12.7%
By County, 2020					
Crawford	\$191.4	2,820	\$88.3	\$19.4	\$21.6
Erie	\$789.2	9,825	\$359.9	\$81.4	\$88.0
Mercer	\$237.8	3,275	\$101.5	\$23.6	\$25.7
Venango	\$104.0	1,679	\$49.4	\$10.9	\$12.3
Region Total	\$1,322.4	17,598	\$599.2	\$135.4	\$147.6

Source: Tourism Economics

PENNSYLVANIA'S GREAT LAKES REGION VISITOR SPENDING & EMPLOYMENT TIMELINES

While employment directly supported by visitor spending rose by nearly 1,400 in 2021, employment remained 11% below the region's 2019 pre-pandemic level.

Visitor Spending & Travel Industry Employment Timelines, 2015-2021

Visitor spending in \$millions, employment in units, % 2021 relative to 2019

	2015	2016	2017	2018	2019	2020	2021	% relative to 2019
Crawford	\$258.1	\$248.1	\$251.7	\$248.6	\$253.0	\$177.3	\$220.3	87.1%
Erie	\$960.9	\$969.4	\$988.8	\$996.5	\$1,019.3	\$733.1	\$927.7	91.0%
Mercer	\$315.4	\$307.4	\$305.7	\$313.7	\$314.8	\$221.2	\$270.7	86.0%
Venango	\$144.9	\$140.3	\$141.1	\$146.5	\$146.2	\$96.5	\$127.8	87.4%
Region Total	\$1,679.2	\$1,665.2	\$1,687.3	\$1,705.3	\$1,733.4	\$1,228.1	\$1,546.5	89.2%
% Change	1.9%	-0.8%	1.3%	1.1%	1.6%	-29.2%	25.9%	

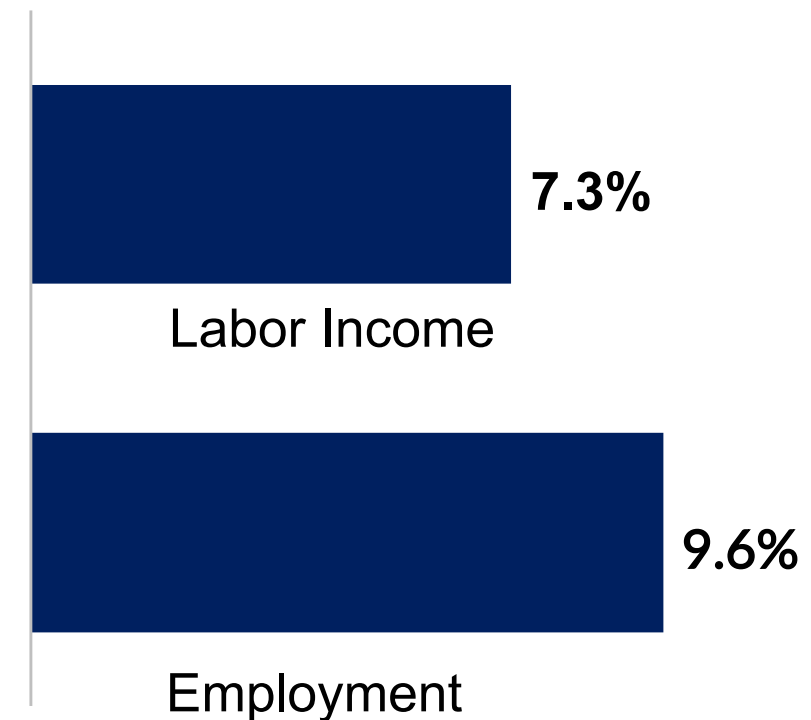
	2015	2016	2017	2018	2019	2020	2021	% relative to 2019
Crawford	2,166	2,156	2,123	2,109	2,129	1,738	1,940	91.1%
Erie	7,715	7,768	7,796	7,846	7,983	6,161	6,959	87.2%
Mercer	2,627	2,584	2,561	2,561	2,595	2,052	2,314	89.2%
Venango	1,188	1,196	1,192	1,214	1,231	1,066	1,188	96.5%
Region Total	13,696	13,705	13,672	13,730	13,938	11,018	12,400	89.0%
% Change	0.7%	0.1%	-0.2%	0.4%	1.5%	-20.9%	12.5%	

Source: Tourism Economics

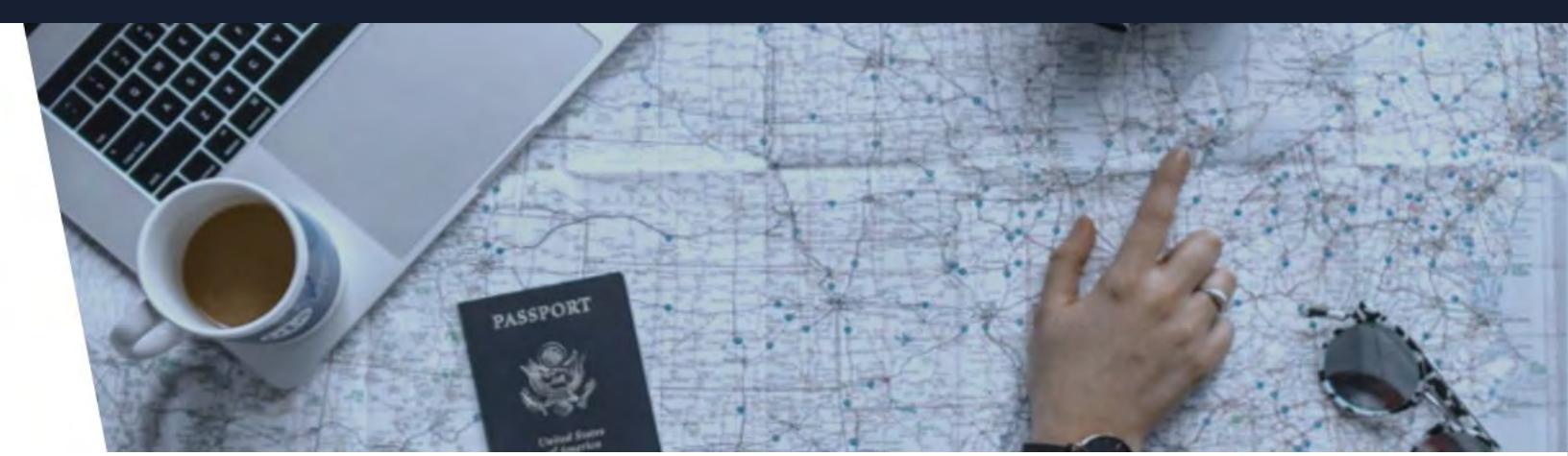
The 12,400 employed in the region's travel- and tourism-related jobs represented close to 1-in-10 jobs in Pennsylvania's Great Lakes Region in 2021.

Travel and Tourism Share of Region's Economy, 2021

Percent of region's total payroll employment and labor income



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



LAUREL HIGHLANDS VISITOR SPENDING

While visitor spending rose 27% in the Laurel Highlands region in 2021, it remained 13% below its 2019 pre-pandemic level.

Visitor Spending By Category, 2020 & 2021

Amounts in \$millions, % change 2020-2021

By 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
Region Total	\$199.3	\$383.2	\$305.6	\$316.1	\$465.0	\$1,669.2
%Change	34.4%	16.9%	18.8%	36.0%	34.8%	27.3%

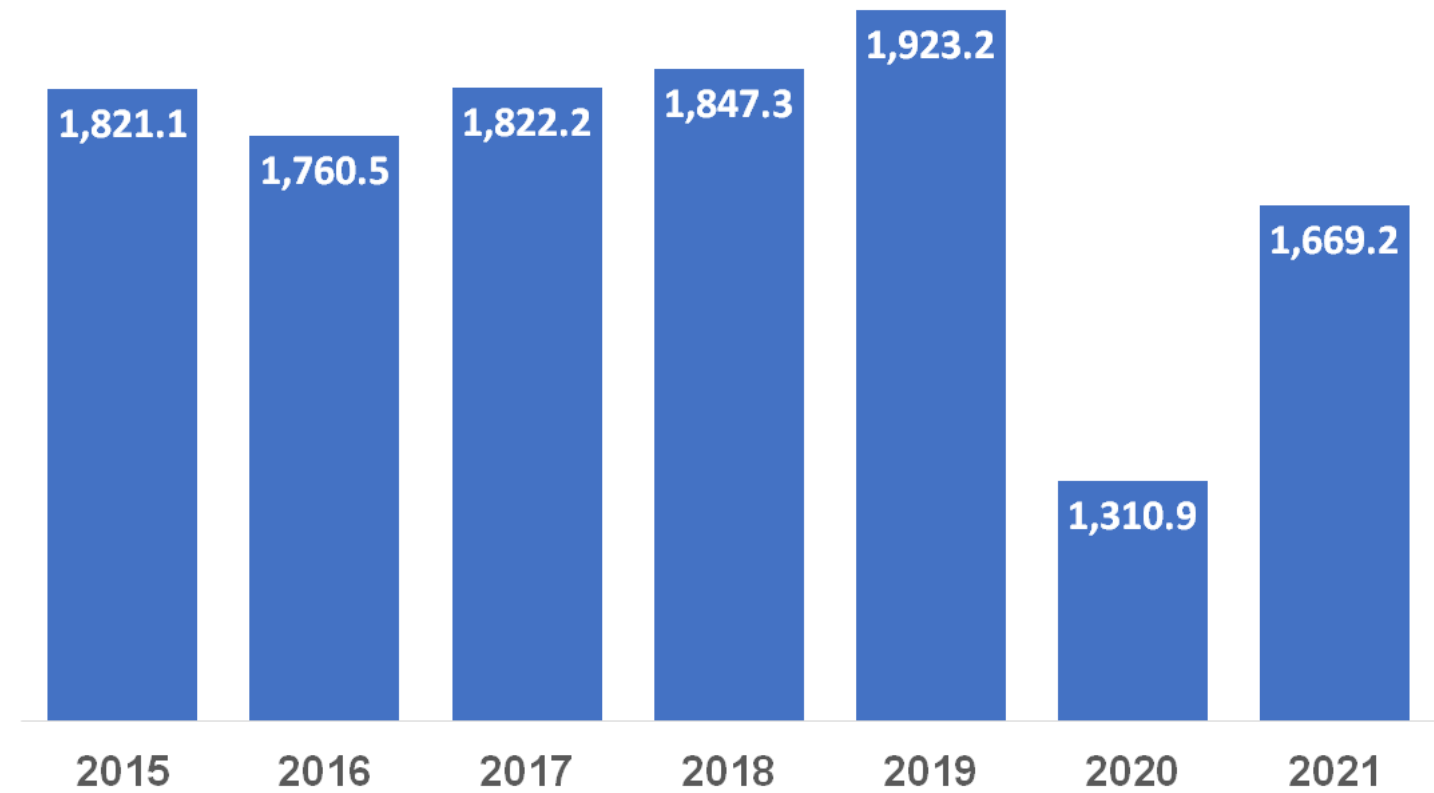
By County, 2020	Lodging	Food & beverages	Retail	Recreation	Transportation	Total
Fayette	\$64.0	\$115.5	\$87.3	\$83.6	\$107.6	\$458.0
Somerset	\$44.3	\$83.7	\$60.2	\$55.5	\$87.8	\$331.5
Westmoreland	\$40.0	\$128.7	\$109.8	\$93.4	\$149.6	\$521.4
Region Total	\$148.3	\$327.8	\$257.3	\$232.4	\$345.0	\$1,310.9

Lodging includes spending at/on second homes.
 Transportation includes both ground and air transportation.

Source: STR, County room tax revenues, PA Department of Revenue, Tourism Economics

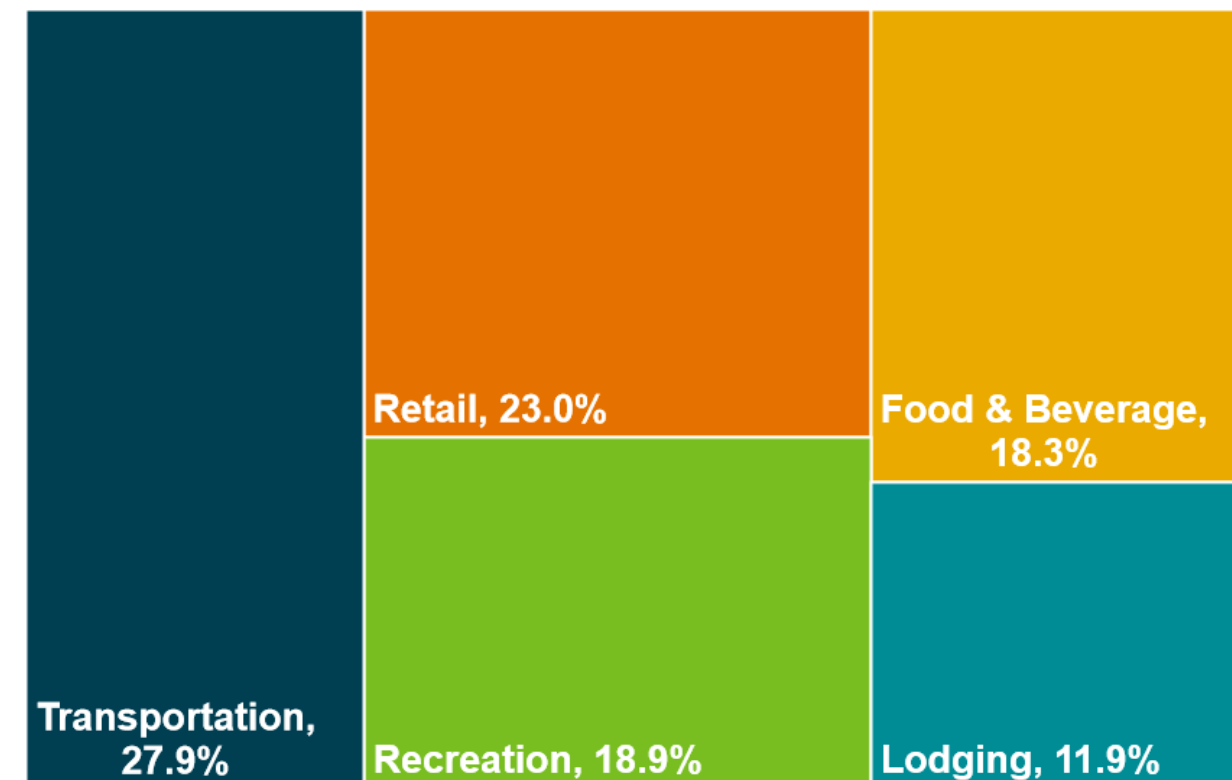
LAUREL HIGHLANDS VISITOR SPENDING, 2015-2021

Amounts in \$millions



VISITOR SPENDING BY CATEGORY, 2021

Percent of Total



Source: Tourism Economics

LAUREL HIGHLANDS ECONOMIC IMPACTS

Tourism Satellite Account - Demand Measures, 2020 & 2021

Amounts in \$millions, % change 2020-2021

By 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
Region Total	\$1,669.2	\$8.6	\$94.8	\$1,772.6
% Change	27.3%	52.6%	1.1%	25.7%

By County, 2020	Visitor Spending	Government	Investment/ PCE	Total Tourism Demand
Fayette	\$458.0	\$2.0	\$32.5	\$492.5
Somerset	\$331.5	\$1.5	\$24.1	\$357.1
Westmoreland	\$521.4	\$2.1	\$37.2	\$560.6
Region Total	\$1,310.9	\$5.7	\$93.8	\$1,410.3

Source: Tourism Economics

Travel Industry (direct) Impacts, 2020 & 2021

Amounts in \$millions, except employment (in units), % change 2020-2021

By County, 2021	Visitor Spend	Employment	Labor Income	Taxes 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
Region Total	\$1,669.2	13,546	\$440.4	\$92.8	\$107.2
% Change	27.3%	12.9%	23.8%	19.2%	15.1%

By County, 2020	Visitor Spend	Employment	Labor Income	Taxes State/Local	Federal
Fayette	\$458.0	4,709	\$156.7	\$30.2	\$37.9
Somerset	\$331.5	2,626	\$71.8	\$18.1	\$20.6
Westmoreland	\$521.4	4,666	\$127.3	\$29.5	\$34.7
Region Total	\$1,310.9	12,001	\$355.9	\$77.8	\$93.2

Travel Economy (total) Impacts, 2020 & 2021

Amounts in \$millions, except employment (in units), % change 2020-2021

By County, 2021	Visitor Spend	Employment	Labor Income	Taxes 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
Region Total	\$1,772.6	21,057	\$852.2	\$176.5	\$192.2
% Change	25.7%	10.5%	16.0%	17.5%	14.8%

By County, 2020	Visitor Spend	Employment	Labor Income	Taxes State/Local	Federal
Fayette	\$492.5	6,988	\$323.3	\$58.6	\$67.9
Somerset	\$357.1	3,940	\$147.1	\$34.6	\$37.0
Westmoreland	\$560.6	8,134	\$264.2	\$56.9	\$62.4
Region Total	\$1,410.3	19,062	\$734.6	\$150.1	\$167.4

Source: Tourism Economics

LAUREL HIGHLANDS VISITOR SPENDING & EMPLOYMENT TIMELINES

Employment directly supported by visitor spending rose 13%, or by close to 1,550 jobs in the Laurel Highlands region in 2021, but remained 11% below its 2019 pre-pandemic level.

Visitor Spending & Travel Industry Employment Timelines, 2015-2021

Visitor spending in \$millions, employment in units, % 2021 relative to 2019

	2015	2016	2017	2018	2019	2020	2021	% relative to 2019
Fayette	\$667.2	\$661.8	\$684.8	\$690.2	\$733.8	\$458.0	\$602.4	82.1%
Somerset	\$399.9	\$377.4	\$392.0	\$398.7	\$416.8	\$331.5	\$394.2	94.6%
Westmoreland	\$753.9	\$721.3	\$745.4	\$758.5	\$772.7	\$521.4	\$672.6	87.0%
Region Total	\$1,821.1	\$1,760.5	\$1,822.2	\$1,847.3	\$1,923.2	\$1,310.9	\$1,669.2	86.8%
% Change	-0.9%	-3.3%	3.5%	1.4%	4.1%	-31.8%	27.3%	

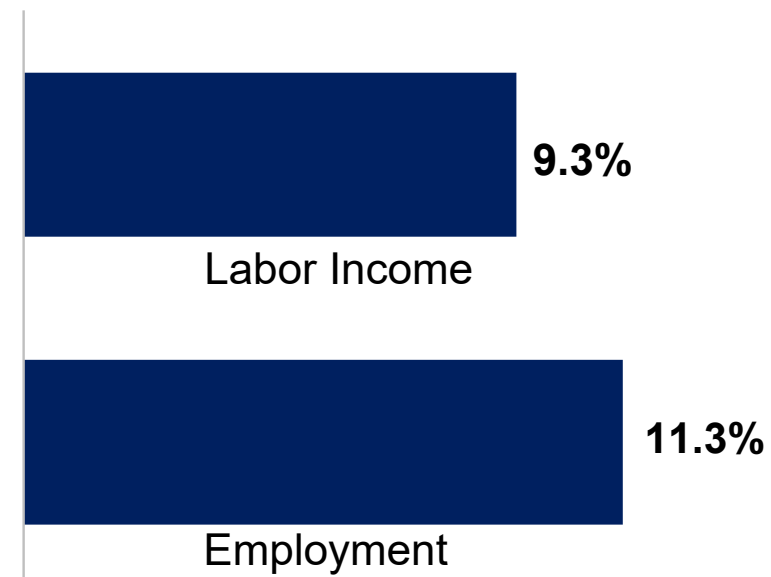
	2015	2016	2017	2018	2019	2020	2021	% relative to 2019
Fayette	5,834	5,852	5,914	5,821	5,985	4,709	5,298	88.5%
Somerset	3,322	3,233	3,261	3,281	3,345	2,626	2,921	87.3%
Westmoreland	5,661	5,649	5,703	5,744	5,855	4,666	5,326	91.0%
Region Total	14,817	14,735	14,878	14,846	15,185	12,001	13,546	89.2%
% Change	-0.8%	-0.6%	1.0%	-0.2%	2.3%	-21.0%	12.9%	

Source: Tourism Economics

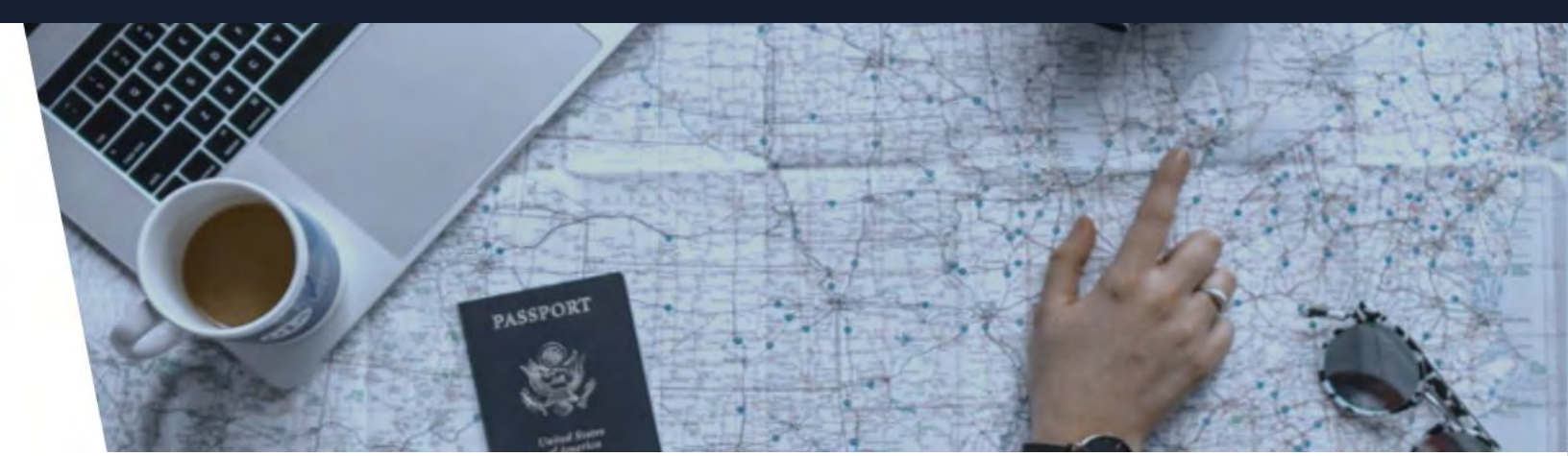
The 13,550 employed in the region's travel- and tourism-related jobs represented an estimated 1-in-9 jobs in the Laurel Highlands region in 2021.

Travel and Tourism Share of Region's Economy, 2021

% of region's total payroll employment and income



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



PITTSBURGH AND ITS COUNTRYSIDE VISITOR SPENDING

While visitor spending rose 29% in the Pittsburgh and Its Countryside region in 2021, it remained 25% below its 2019 pre-pandemic level.

Visitor Spending By Category, 2020 & 2021

Amounts in \$millions, % change 2020-2021

By 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
Region Total	\$664.3	\$1,450.1	\$1,132.0	\$1,309.7	\$1,933.1	\$6,489.3
% Change	43.6%	20.9%	17.4%	25.9%	43.1%	29.3%

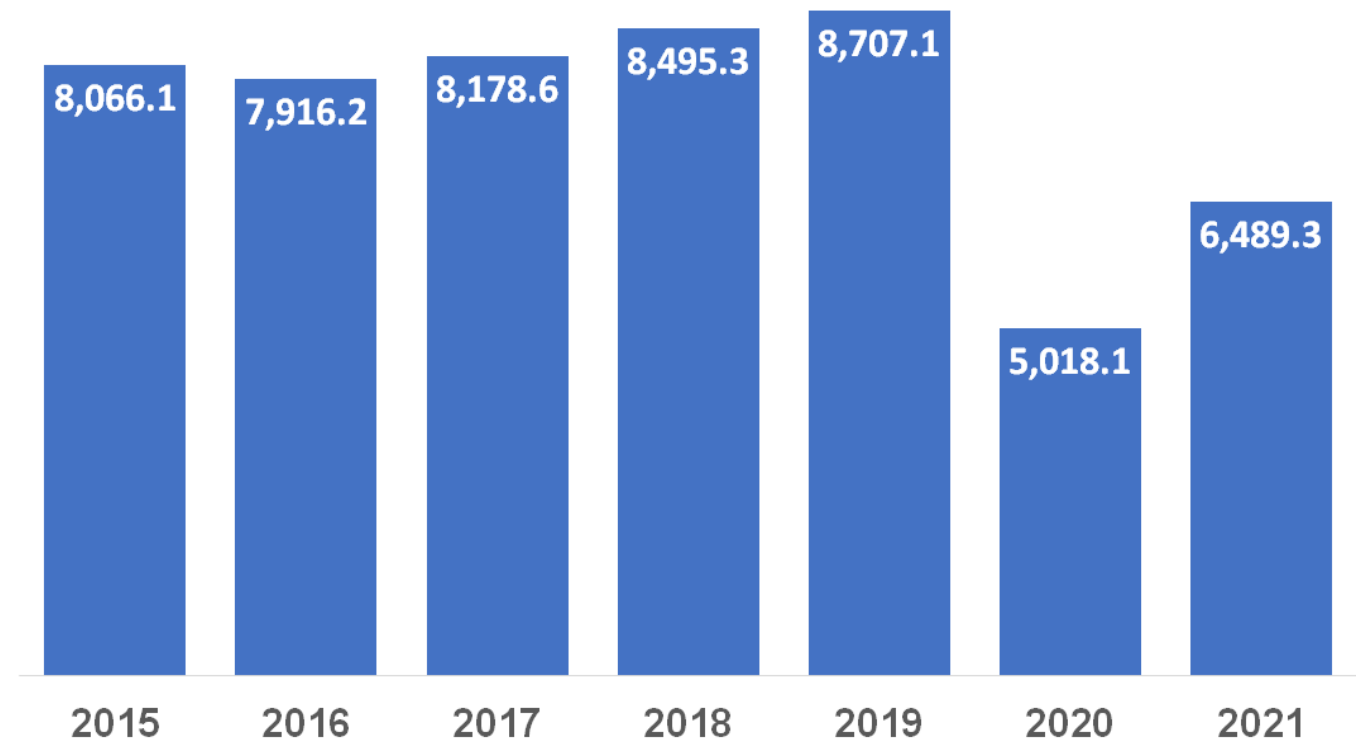
By County, 2020	Lodging	Food & beverages	Retail	Recreation	Transportation	Total
Allegheny	\$340.8	\$848.1	\$687.8	\$762.9	\$963.4	\$3,603.0
Armstrong	\$3.6	\$16.0	\$10.7	\$17.3	\$20.6	\$68.3
Beaver	\$18.5	\$55.6	\$41.8	\$36.0	\$68.9	\$220.8
Butler	\$38.7	\$101.0	\$86.4	\$65.7	\$107.4	\$399.2
Greene	\$5.8	\$14.9	\$10.2	\$9.2	\$18.1	\$58.2
Indiana	\$9.4	\$30.1	\$22.4	\$18.0	\$31.3	\$111.2
Lawrence	\$4.3	\$27.1	\$20.0	\$20.6	\$24.6	\$96.6
Washington	\$41.3	\$106.7	\$85.0	\$111.0	\$116.8	\$460.9
Region Total	\$462.5	\$1,199.6	\$964.3	\$1,040.6	\$1,351.1	\$5,018.1

Lodging includes spending at/or second homes.
 Transportation includes both ground and air transportation.

Sources: STR, County room tax revenues, PA Department of Revenue, Tourism Economics

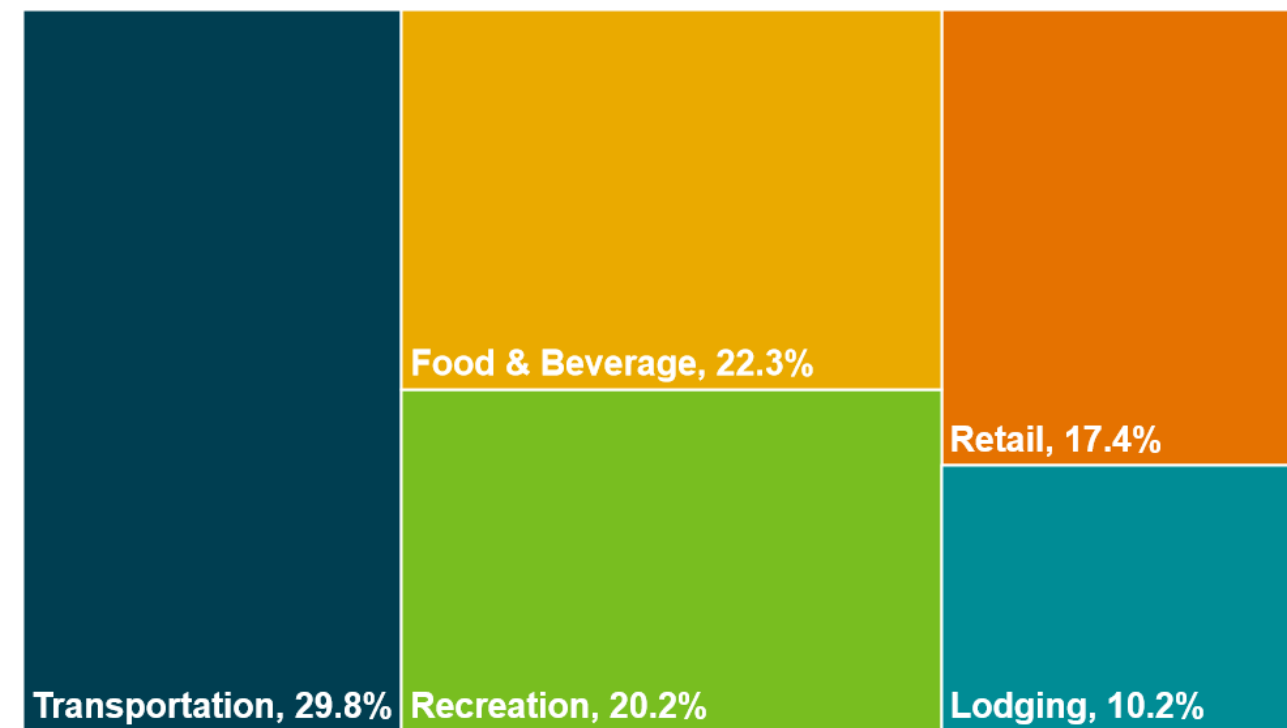
PITTSBURGH AND ITS COUNTRYSIDE VISITOR SPENDING, 2015-2021

Amounts in \$millions



VISITOR SPENDING BY CATEGORY, 2021

Percent of Total



Source: Tourism Economics

PITTSBURGH AND ITS COUNTRYSIDE ECONOMIC IMPACTS

Tourism Satellite Account - Demand Measures, 2020 & 2021

Amounts in \$millions, % change 2020-2021

By 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
Region Total	\$6,489.3	\$38.8	\$363.7	\$6,891.8
% Change	29.3%	56.4%	2.5%	27.7%

By County, 2020	Visitor Spending	Government	Investment/ PCE	Total Tourism Demand
Allegheny	\$3,603.0	\$19.6	\$254.1	\$3,876.6
Armstrong	\$68.3	\$0.2	\$5.0	\$73.5
Beaver	\$220.8	\$0.8	\$15.6	\$237.2
Butler	\$399.2	\$1.6	\$28.4	\$429.2
Greene	\$58.2	\$0.2	\$4.2	\$62.6
Indiana	\$111.2	\$0.4	\$8.0	\$119.7
Lawrence	\$96.6	\$0.2	\$6.9	\$103.6
Washington	\$460.9	\$1.9	\$32.7	\$495.4
Region Total	\$5,018.1	\$24.8	\$354.8	\$5,397.7

Source: Tourism Economics

PITTSBURGH AND ITS COUNTRYSIDE ECONOMIC IMPACTS

Travel and Tourism Industry (Direct) Impacts, 2020 & 2021

in \$millions, except employment (in units), % change 2020-2021

By County, 2021	Visitor		Labor Income	Taxes	
	Spend	Employment		State/Local	Federal
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
Region Total	\$6,489.3	48,326	\$1,908.1	\$382.5	\$448.4
% Change	29.3%	11.2%	16.6%	17.2%	11.5%
By County, 2020					
Allegheny	\$3,603.0	30,891	\$1,252.6	\$243.3	\$301.5
Armstrong	\$68.3	535	\$14.7	\$3.6	\$4.2
Beaver	\$220.8	1,874	\$57.8	\$12.8	\$15.3
Butler	\$399.2	3,283	\$96.4	\$22.4	\$26.4
Greene	\$58.2	450	\$10.9	\$2.9	\$3.3
Indiana	\$111.2	1,161	\$29.3	\$6.5	\$7.8
Lawrence	\$96.6	831	\$23.3	\$5.2	\$6.4
Washington	\$460.9	4,448	\$150.9	\$29.6	\$37.0
Region Total	\$5,018.1	43,472	\$1,636.1	\$326.4	\$402.0

Source: Tourism Economics

Travel Economy (total) Impacts, 2020 & 2021

Amounts in \$millions, except employment (in units), % change 2020-2021

By County, 2021	Visitor		Labor Income	Taxes	
	Spend	Employment		State/Local	Federal
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
Region Total	\$6,891.8	76,592	\$3,820.2	\$725.1	\$802.5
% Change	27.7%	9.2%	12.4%	15.2%	11.4%
By County, 2020					
Allegheny	\$3,876.6	49,172	\$2,619.9	\$468.5	\$540.0
Armstrong	\$73.5	1,039	\$27.6	\$7.0	\$7.6
Beaver	\$237.2	3,286	\$112.2	\$24.7	\$27.6
Butler	\$429.2	5,377	\$202.3	\$43.3	\$47.5
Greene	\$62.6	747	\$20.5	\$5.7	\$6.0
Indiana	\$119.7	1,981	\$61.1	\$12.5	\$14.0
Lawrence	\$103.6	1,510	\$45.2	\$10.3	\$11.5
Washington	\$495.4	7,058	\$309.1	\$57.5	\$66.4
Region Total	\$5,397.7	70,168	\$3,397.9	\$629.6	\$720.5

Source: Tourism Economics

PITTSBURGH AND ITS COUNTRYSIDE VISITOR SPENDING & EMPLOYMENT TIMELINES

Employment directly supported by visitor spending rose 11%, or by nearly 4,900 jobs in the Pittsburgh and Its Countryside region in 2021, but remained 19% below its 2019 pre-pandemic level.

Visitor Spending & Travel Industry Employment Timelines, 2015-2021

Visitor spending in \$millions, employment in units, % 2021 relative to 2019

	2015	2016	2017	2018	2019	2020	2021	% relative to 2019
Allegheny	\$5,987.7	\$5,950.8	\$6,137.9	\$6,379.6	\$6,572.4	\$3,603.0	\$4,677.9	71.2%
Armstrong	\$88.9	\$88.5	\$92.4	\$93.2	\$93.7	\$68.3	\$90.0	96.0%
Beaver	\$267.0	\$270.5	\$283.4	\$292.0	\$311.8	\$220.8	\$284.5	91.2%
Butler	\$604.2	\$592.1	\$593.7	\$613.9	\$632.0	\$399.2	\$507.7	80.3%
Greene	\$89.2	\$76.1	\$78.5	\$83.6	\$78.7	\$58.2	\$70.7	89.8%
Indiana	\$162.0	\$155.4	\$162.1	\$165.7	\$170.9	\$111.2	\$140.2	82.0%
Lawrence	\$120.1	\$120.2	\$126.8	\$130.0	\$133.2	\$96.6	\$124.2	93.2%
Washington	\$747.0	\$662.6	\$703.7	\$737.3	\$714.3	\$460.9	\$594.1	83.2%
Region Total	\$8,066.1	\$7,916.2	\$8,178.6	\$8,495.3	\$8,707.1	\$5,018.1	\$6,489.3	74.5%
% Change	3.7%	-1.9%	3.3%	3.9%	2.5%	-42.4%	29.3%	

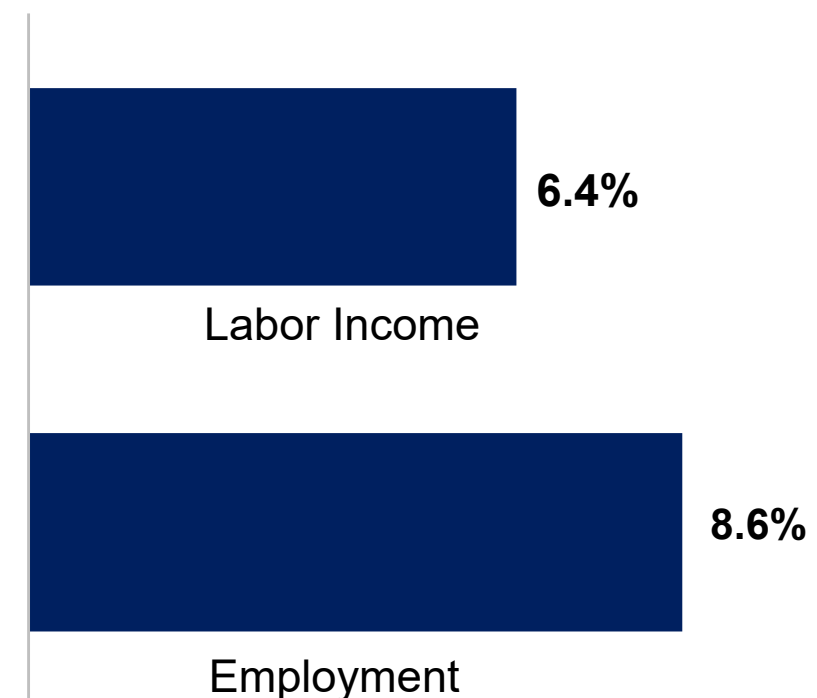
	2015	2016	2017	2018	2019	2020	2021	% relative to 2019
Allegheny	40,888	41,530	42,295	43,080	43,848	30,891	34,223	78.0%
Armstrong	584	594	608	621	621	535	635	102.3%
Beaver	2,096	2,111	2,124	2,157	2,235	1,874	2,125	95.1%
Butler	4,048	4,074	4,073	4,162	4,199	3,283	3,706	88.3%
Greene	487	483	486	505	509	450	503	98.9%
Indiana	1,426	1,421	1,443	1,484	1,506	1,161	1,297	86.1%
Lawrence	909	927	933	954	976	831	921	94.4%
Washington	5,948	5,856	5,875	6,000	5,974	4,448	4,915	82.3%
Region Total	56,388	56,995	57,838	58,964	59,868	43,472	48,326	80.7%
% Change	1.1%	1.1%	1.5%	1.9%	1.5%	-27.4%	11.2%	

Source: Tourism Economics

The 48,325 jobs represented 1-in-11.6 jobs in the Pittsburgh and Its Countryside region in 2021.

Travel and Tourism Share of Region's Economy, 2021

Percent of region's total payroll employment and labor income



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



PENNSYLVANIA WILDS VISITOR SPENDING

Visitor Spending By Category, 2020 & 2021

Amounts in \$millions, % change 2020-2021

By 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
Region Total	\$166.3	\$380.4	\$304.6	\$282.6	\$548.6	\$1,682.6
% Change	34.2%	17.7%	18.9%	30.7%	37.0%	27.5%

By County, 2020	Lodging	Food & beverages	Retail	Recreation	Transportation	Total
Cameron	\$0.6	\$1.9	\$1.6	\$2.0	\$2.7	\$8.8
Clarion	\$9.6	\$23.2	\$20.9	\$15.6	\$24.7	\$93.9
Clearfield	\$18.5	\$51.0	\$43.3	\$34.2	\$66.4	\$213.5
Clinton	\$7.1	\$26.0	\$19.6	\$17.2	\$34.6	\$104.5
Elk	\$6.8	\$16.8	\$13.2	\$9.3	\$16.0	\$62.1
Forest	\$5.4	\$6.4	\$5.8	\$5.6	\$6.6	\$29.8
Jefferson	\$6.0	\$18.4	\$14.7	\$13.6	\$29.1	\$81.8
Lycoming	\$31.7	\$75.1	\$53.2	\$44.6	\$77.6	\$282.2
McKean	\$11.3	\$28.2	\$21.4	\$19.9	\$40.2	\$121.0
Potter	\$5.6	\$9.2	\$7.7	\$6.0	\$10.3	\$38.8
Tioga	\$17.3	\$38.8	\$29.7	\$27.0	\$46.1	\$158.9
Warren	\$4.1	\$28.0	\$25.2	\$21.2	\$46.1	\$124.7
Region Total	\$124.0	\$323.1	\$256.3	\$216.3	\$400.4	\$1,320.0

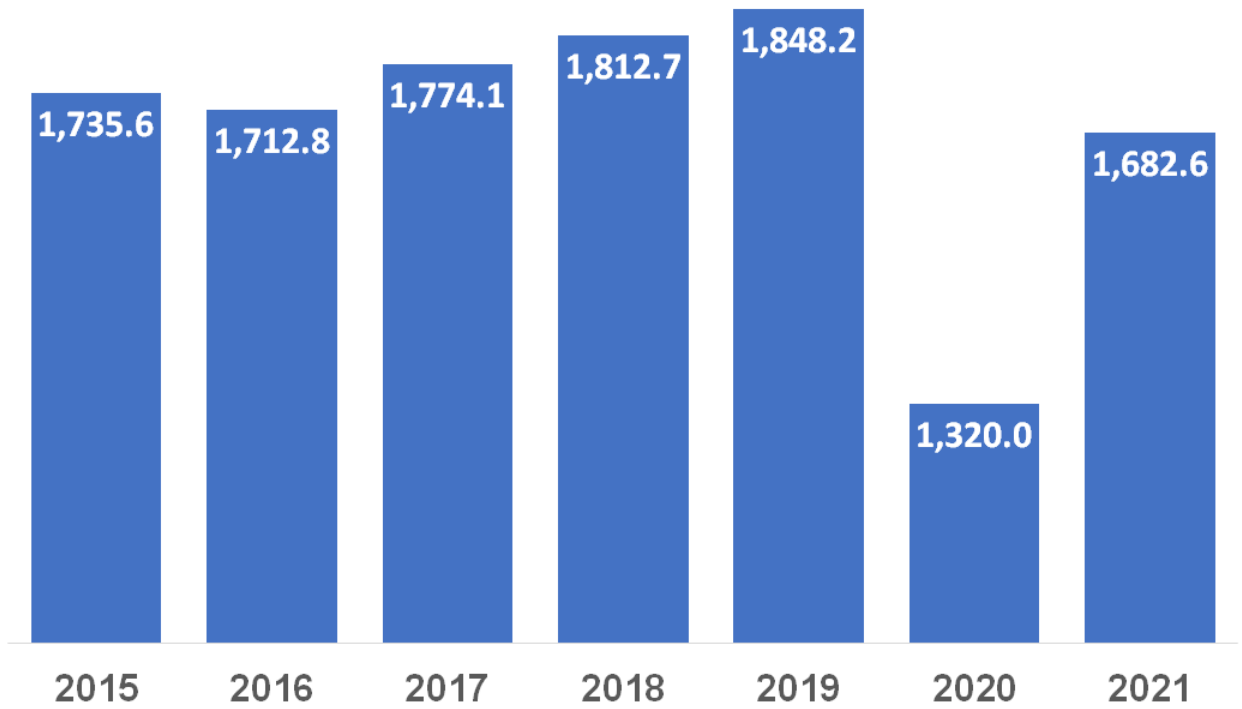
Lodging includes spending at/on second homes.
Transportation includes both ground and air transportation.

Sources: STR, County room tax revenues, PA Department of Revenue, Tourism Economics

PENNSYLVANIA WILDS VISITOR SPENDING, 2017-2021

While visitor spending rose 27% in the Pennsylvania Wilds region in 2021, it remained 9% below its 2019 pre-pandemic level.

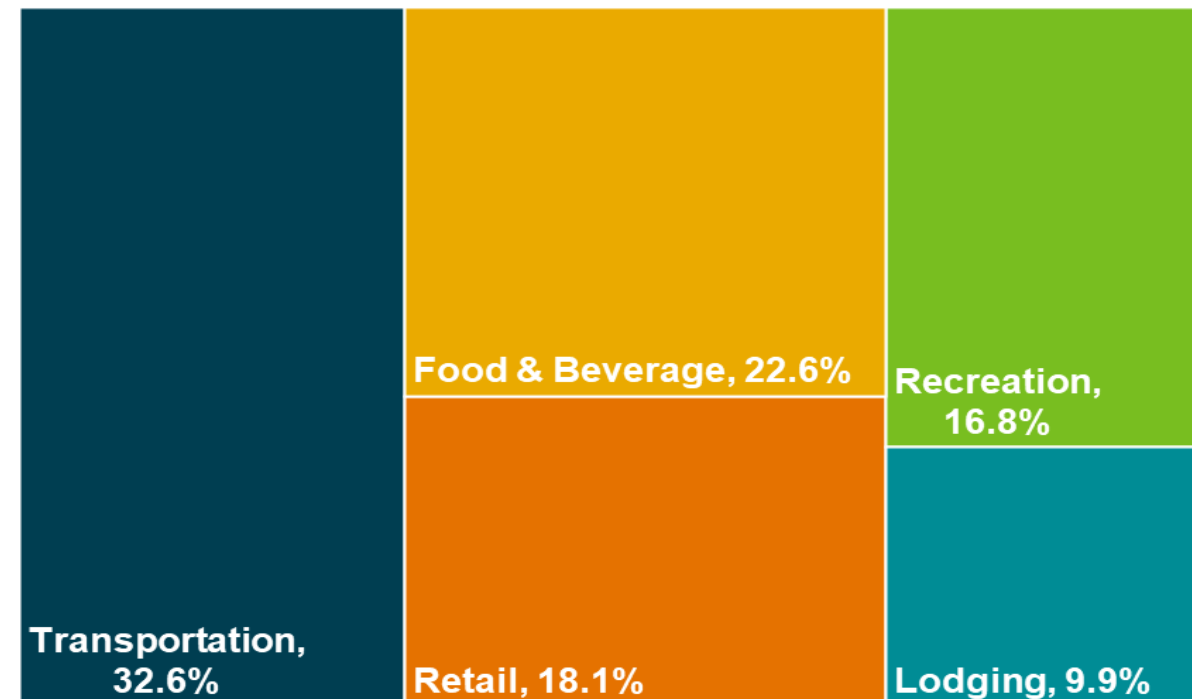
Amounts in \$millions



Source: Tourism Economics

VISITOR SPENDING BY CATEGORY, 2021

Percent of total



Source: Tourism Economics

PENNSYLVANIA WILDS ECONOMIC IMPACTS

Tourism Satellite Account - Demand Measures, 2020 & 2021

Amounts in \$millions, % change 2020-2021

By 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
Region Total	\$1,682.6	\$6.8	\$102.2	\$1,791.7
% Change	27.5%	35.7%	2.1%	25.7%

By County, 2020	Visitor Spending	Government	Investment/ PCE	Total Tourism Demand
Cameron	\$8.8	\$0.0	\$0.9	\$9.7
Clarion	\$93.9	\$0.3	\$7.0	\$101.3
Clearfield	\$213.5	\$0.7	\$15.7	\$229.8
Clinton	\$104.5	\$0.3	\$8.0	\$112.9
Elk	\$62.1	\$0.3	\$4.8	\$67.2
Forest	\$29.8	\$0.1	\$3.0	\$32.9
Jefferson	\$81.8	\$0.3	\$6.2	\$88.2
Lycoming	\$282.2	\$1.2	\$20.4	\$303.8
McKean	\$121.0	\$0.5	\$8.9	\$130.4
Potter	\$38.8	\$0.2	\$3.6	\$42.7
Tioga	\$158.9	\$0.8	\$11.9	\$171.6
Warren	\$124.7	\$0.3	\$9.6	\$134.5
Region Total	\$1,320.0	\$5.0	\$100.1	\$1,425.1

Source: Tourism Economics

PENNSYLVANIA WILDS ECONOMIC IMPACTS

Travel Industry (direct) Impacts, 2020 & 2021

Amounts in \$millions, except employment (in units), % change 2020-2021

By 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
Region Total	\$1,682.6	12,434	\$370.0	\$85.3	\$96.2
% Change	27.5%	11.8%	18.6%	16.4%	11.6%

By County, 2020	Visitor		Taxes		
	Spend	Employment	Labor Income	State/Local	Federal
Cameron	\$8.8	75	\$1.5	\$0.4	\$0.5
Clarion	\$93.9	981	\$24.8	\$5.4	\$6.6
Clearfield	\$213.5	1,567	\$49.1	\$11.6	\$13.7
Clinton	\$104.5	929	\$23.7	\$5.7	\$6.7
Elk	\$62.1	535	\$12.6	\$3.3	\$3.7
Forest	\$29.8	148	\$4.1	\$1.4	\$1.5
Jefferson	\$81.8	700	\$19.5	\$4.5	\$5.4
Lycoming	\$282.2	2,430	\$73.0	\$16.4	\$19.5
McKean	\$121.0	1,026	\$29.3	\$6.8	\$8.0
Potter	\$38.8	254	\$6.3	\$2.0	\$2.1
Tioga	\$158.9	1,449	\$40.7	\$9.3	\$10.9
Warren	\$124.7	1,023	\$27.6	\$6.6	\$7.8
Region Total	\$1,320.0	11,118	\$312.0	\$73.3	\$86.2

Source: Tourism Economics

Travel Economy (total) Impacts, 2020 & 2021

Amounts in \$millions, except employment (in units), % change 2020-2021

By 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
Region Total	\$1,791.7	19,369	\$693.1	\$163.3	\$172.8
% Change	25.7%	9.6%	14.6%	15.2%	11.4%

By County, 2020	Visitor		Taxes		
	Spend	Employment	Labor Income	State/Local	Federal
Cameron	\$9.7	124	\$2.8	\$0.8	\$0.9
Clarion	\$101.3	1,558	\$50.0	\$10.5	\$11.8
Clearfield	\$229.8	2,561	\$94.5	\$22.5	\$24.7
Clinton	\$112.9	1,475	\$46.4	\$11.0	\$12.0
Elk	\$67.2	870	\$24.7	\$6.3	\$6.7
Forest	\$32.9	234	\$7.9	\$2.6	\$2.6
Jefferson	\$88.2	1,193	\$38.7	\$8.8	\$9.6
Lycoming	\$303.8	3,857	\$143.0	\$31.6	\$35.0
McKean	\$130.4	1,596	\$56.6	\$13.1	\$14.4
Potter	\$42.7	406	\$11.9	\$3.7	\$3.7
Tioga	\$171.6	2,179	\$74.8	\$17.8	\$19.6
Warren	\$134.5	1,616	\$53.9	\$12.9	\$14.1
Region Total	\$1,425.1	17,669	\$605.1	\$141.8	\$155.1

Source: Tourism Economics

PENNSYLVANIA WILDS VISITOR SPENDING & EMPLOYMENT TIMELINES

Employment directly supported by visitor spending rose 12%, or by nearly 1,320 jobs in 2021, but remained 6% below its 2019 pre-pandemic level.

Visitor Spending & Travel Industry Employment Timelines, 2015-2021

Visitor spending in \$millions, employment in units, % 2021 relative to 2019

	2015	2016	2017	2018	2019	2020	2021	% relative to 2019
Cameron	\$9.7	\$10.1	\$10.1	\$10.0	\$10.4	\$8.8	\$11.0	106.1%
Clarion	\$117.7	\$118.9	\$125.5	\$123.3	\$126.0	\$93.9	\$110.0	87.3%
Clearfield	\$270.0	\$266.2	\$277.3	\$292.7	\$293.9	\$213.5	\$279.8	95.2%
Clinton	\$147.7	\$140.6	\$149.9	\$152.4	\$160.0	\$104.5	\$139.5	87.2%
Elk	\$74.7	\$78.0	\$80.2	\$79.2	\$82.5	\$62.1	\$79.1	95.9%
Forest	\$27.0	\$26.3	\$27.2	\$27.1	\$26.1	\$29.8	\$35.1	134.4%
Jefferson	\$119.1	\$116.0	\$124.1	\$121.9	\$120.8	\$81.8	\$101.3	83.9%
Lycoming	\$382.5	\$370.6	\$379.3	\$392.1	\$408.9	\$282.2	\$368.7	90.2%
McKean	\$174.6	\$172.9	\$180.0	\$183.4	\$182.6	\$121.0	\$155.5	85.1%
Potter	\$38.8	\$37.7	\$40.2	\$38.9	\$39.4	\$38.8	\$46.7	118.7%
Tioga	\$195.2	\$193.3	\$193.5	\$201.4	\$203.6	\$158.9	\$193.6	95.1%
Warren	\$178.6	\$182.3	\$186.8	\$190.2	\$194.1	\$124.7	\$162.2	83.6%
Region Total	\$1,735.6	\$1,712.8	\$1,774.1	\$1,812.7	\$1,848.2	\$1,320.0	\$1,682.6	91.0%
% Change	0.7%	-1.3%	3.6%	2.2%	2.0%	-28.6%	27.5%	

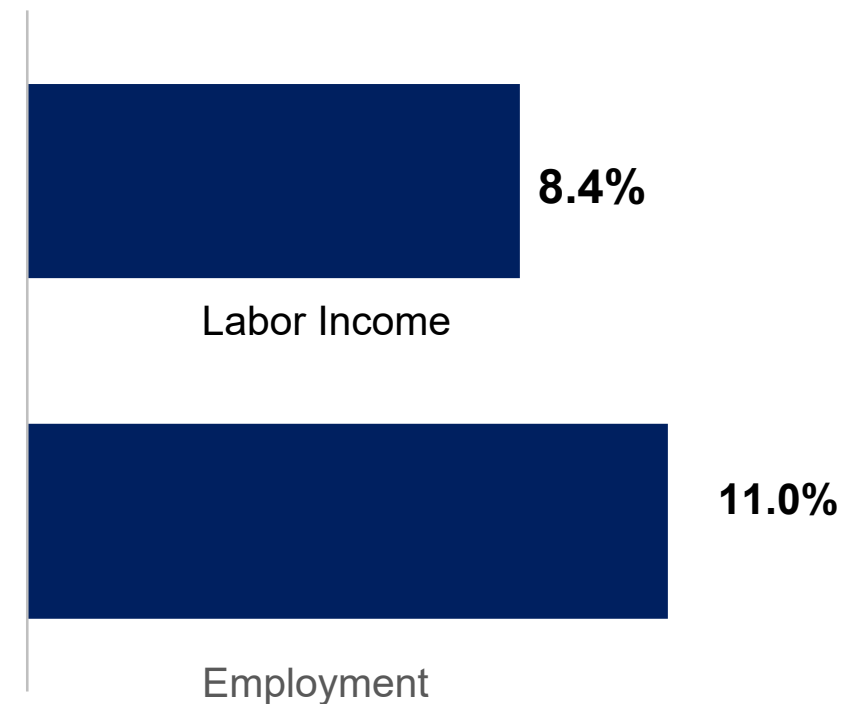
	2015	2016	2017	2018	2019	2020	2021	% relative to 2019
Cameron	76	77	77	78	80	75	80	99.9%
Clarion	1,071	1,110	1,114	1,127	1,157	981	1,095	94.7%
Clearfield	1,799	1,812	1,836	1,869	1,897	1,567	1,744	92.0%
Clinton	1,064	1,069	1,073	1,090	1,128	929	1,010	89.5%
Elk	573	591	596	601	622	535	601	96.6%
Forest	138	139	139	140	142	148	170	120.0%
Jefferson	821	816	828	839	846	700	772	91.3%
Lycoming	2,952	2,930	2,951	2,989	3,032	2,430	2,723	89.8%
McKean	1,164	1,166	1,197	1,203	1,216	1,026	1,169	96.2%
Potter	246	245	253	257	257	254	293	113.7%
Tioga	1,573	1,623	1,630	1,640	1,680	1,449	1,623	96.6%
Warren	1,156	1,167	1,177	1,189	1,212	1,023	1,152	95.1%
Region Total	12,632	12,745	12,872	13,021	13,268	11,118	12,434	93.7%
% Change	0.9%	0.9%	1.0%	1.2%	1.9%	-16.2%	11.8%	

Source: Tourism Economics

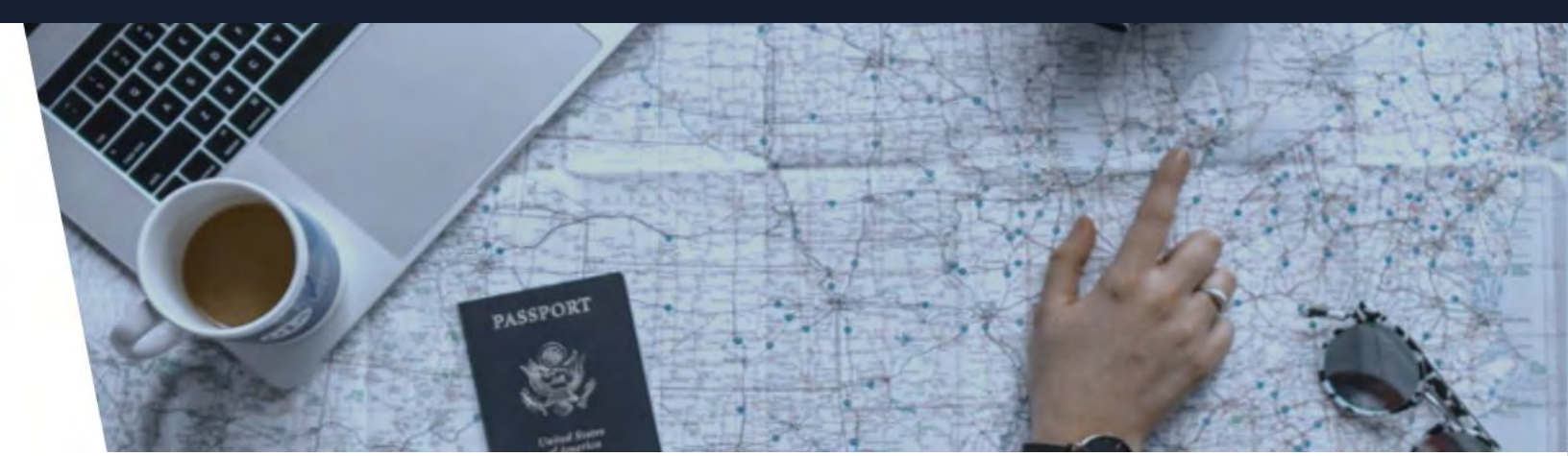
The 12,430 employed in the region's travel- and tourism-related industry represented nearly 1-in-9 jobs in the Pennsylvania Wilds region in 2021.

Travel and Tourism Share of Region's Economy, 2021

Percent of region's total payroll employment and labor income



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



VALLEYS OF THE SUSQUEHANNA VISITOR SPENDING

While visitor spending rose by nearly 30% in the Valleys of the Susquehanna region in 2021, it remained 7% below its 2019 pre-pandemic level.

Visitor Spending By Category, 2020 & 2021

By County, 2021	Lodging	Food & beverages	Retail	Recreation	Transportation	Total
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
Region Total	\$73.3	\$153.0	\$113.4	\$113.4	\$172.4	\$625.5
% Change	41.7%	20.4%	23.1%	34.7%	34.2%	29.3%

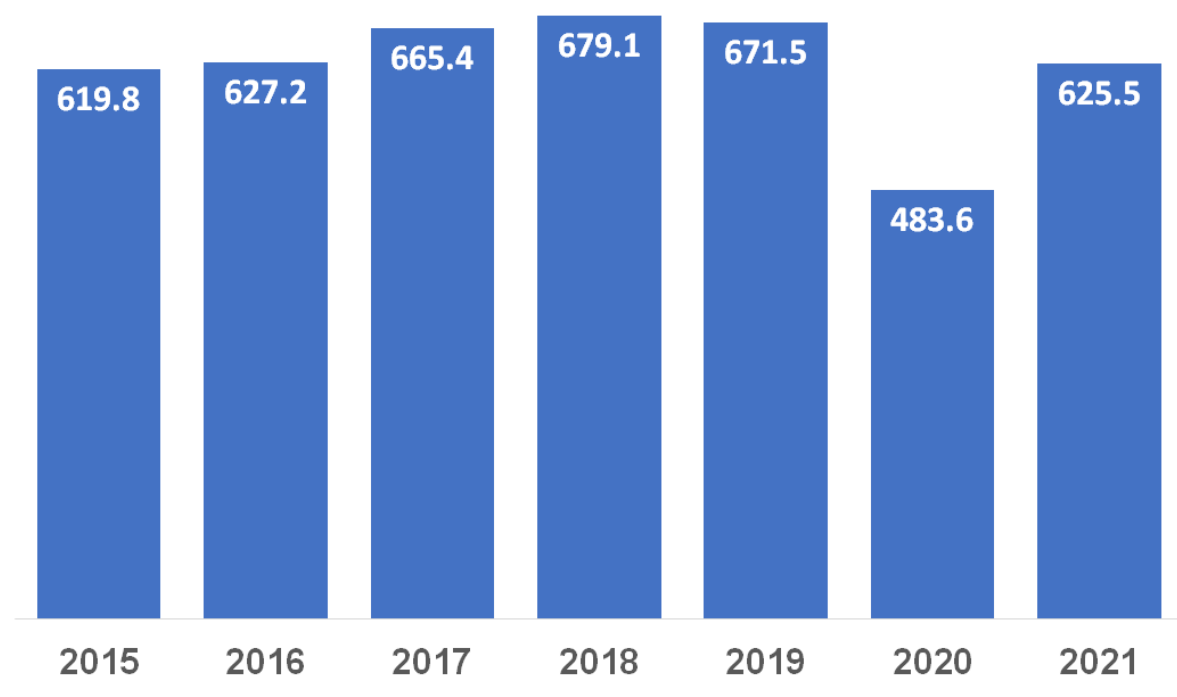
By County, 2020	Lodging	Food & beverages	Retail	Recreation	Transportation	Total
Columbia	\$14.6	\$33.7	\$23.6	\$19.8	\$34.2	\$125.9
Montour	\$10.8	\$19.6	\$14.2	\$13.8	\$19.0	\$77.5
Northumberland	\$2.7	\$19.7	\$13.4	\$21.8	\$29.0	\$86.5
Snyder	\$8.4	\$21.5	\$17.9	\$14.3	\$18.9	\$81.0
Union	\$15.1	\$32.5	\$22.9	\$14.5	\$27.5	\$112.6
Region Total	\$51.7	\$127.1	\$92.1	\$84.2	\$128.5	\$483.6

Lodging includes spending at/or second homes.
 Transportation includes both ground and air transportation.

Source: STR, County room tax revenues, PA Department of Revenue, Tourism Economics

Valleys of the Susquehanna Visitor Spending, 2015-2021

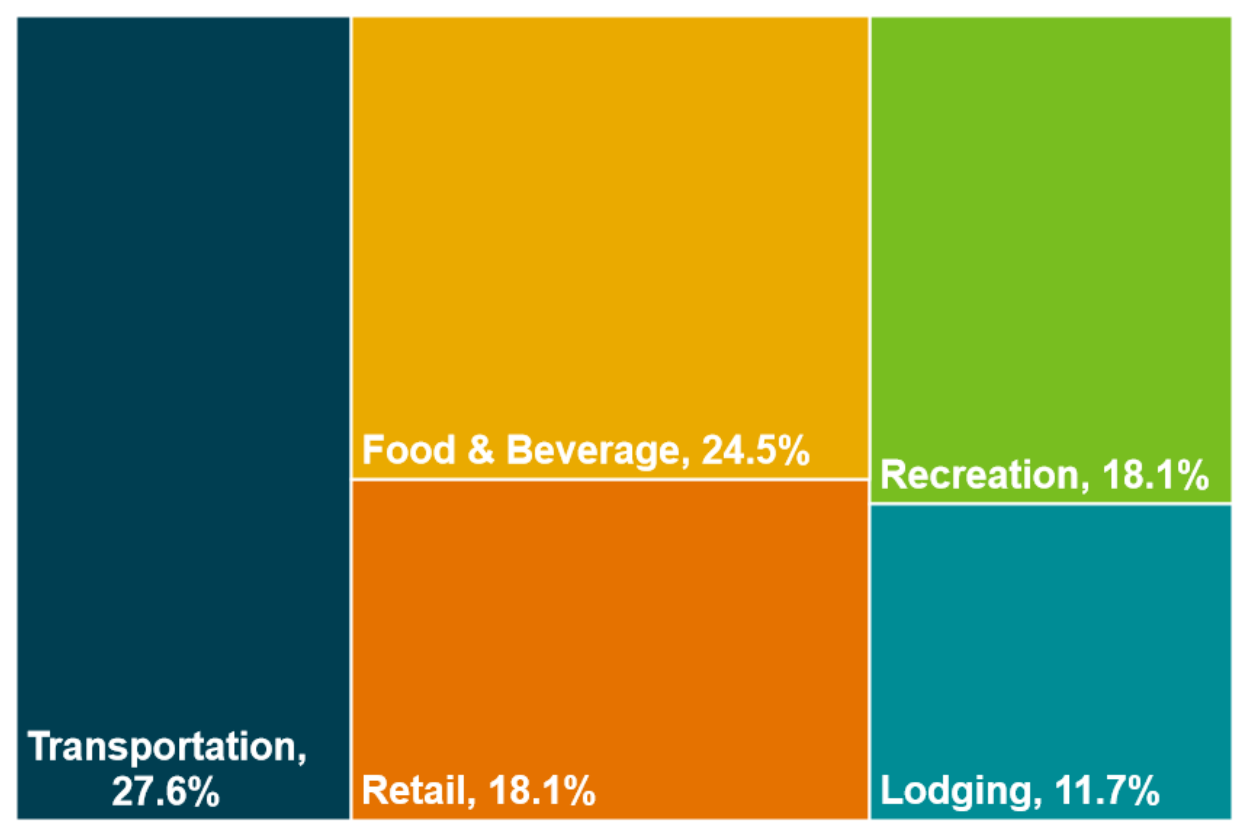
Amounts in \$millions



Source: Tourism Economics

Visitor Spending By Category, 2021

Percent of total



Source: Tourism Economics

VALLEYS OF THE SUSQUEHANNA ECONOMIC IMPACTS

Tourism Satellite Account - Demand Measures, 2020 & 2021

Amounts in \$millions, % percent change 2020-2021

By County, 2021	Visitor Spending	Government	Investment/ 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
Region Total	\$625.5	\$2.6	\$35.8	\$663.9
% Change	29.3%	42.9%	2.9%	27.6%

By County, 2020	Visitor Spending	Government	Investment/ PCE	Total Tourism Demand
Columbia	\$125.9	\$0.4	\$9.1	\$135.4
Montour	\$77.5	\$0.3	\$5.5	\$83.3
Northumberland	\$86.5	\$0.1	\$6.2	\$92.9
Snyder	\$81.0	\$0.3	\$5.8	\$87.1
Union	\$112.6	\$0.6	\$8.3	\$121.5
Region Total	\$483.6	\$1.8	\$34.8	\$520.3

Source: Tourism Economics

Travel and Tourism industry (direct) Impacts, 2020 & 2021

Amounts in \$millions, except employment (in units), % change 2020-2021

By County, 2021	Visitor			Taxes	
	Spend	Employment	Labor Income	State/Local	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
Region Total	\$625.5	4,915	\$144.9	\$32.4	\$37.0
% Change	29.3%	10.6%	21.0%	18.5%	13.8%

By County, 2020	Visitor Spend	Employment	Labor Income	Taxes State/Local	Taxes Federal
Columbia	\$125.9	1,079	\$27.7	\$6.8	\$7.9
Montour	\$77.5	808	\$20.5	\$4.6	\$5.4
Northumberland	\$86.5	849	\$26.6	\$5.2	\$6.7
Snyder	\$81.0	672	\$16.1	\$4.2	\$4.8
Union	\$112.6	1,035	\$28.8	\$6.6	\$7.7
Region Total	\$483.6	4,443	\$119.7	\$27.3	\$32.5

Travel and Tourism Economy (total) Impacts, 2020 & 2021

Amounts in \$millions, except employment (in units), % change 2020-2021

By County, 2021	Visitor			Taxes	
	Spend	Employment	Labor Income	State/Local	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
Region Total	\$663.9	7,963	\$283.3	\$62.0	\$66.3
% Change	27.6%	8.5%	15.0%	17.2%	13.6%

By County, 2020	Visitor Spend	Employment	Labor Income	Taxes State/Local	Taxes Federal
Columbia	\$135.4	1,777	\$56.8	\$13.1	\$14.2
Montour	\$83.3	1,191	\$43.1	\$8.8	\$9.7
Northumberland	\$92.9	1,605	\$51.5	\$10.3	\$12.0
Snyder	\$87.1	1,107	\$33.7	\$8.1	\$8.6
Union	\$121.5	1,657	\$61.1	\$12.7	\$13.9
Region Total	\$520.3	7,337	\$246.3	\$52.9	\$58.4

Source: Tourism Economics

VALLEYS OF THE SUSQUEHANNA

VISITOR SPENDING & EMPLOYMENT TIMELINES

Employment directly supported by visitor spending rose 11%, or by nearly 500 jobs in 2021, but remained 12% below its 2019 pre-pandemic level.

Visitor Spending & Travel Industry Employment Timelines, 2015-2021

Visitor spending in \$millions, employment in units, % 2021 relative to 2019

	2015	2016	2017	2018	2019	2020	2021	% relative to 2019
Columbia	\$151.9	\$154.2	\$167.7	\$178.3	\$171.0	\$125.9	\$162.8	95.2%
Montour	\$96.1	\$94.4	\$97.9	\$100.5	\$95.6	\$77.5	\$101.5	106.1%
Northumberland	\$129.8	\$133.1	\$138.1	\$137.9	\$140.5	\$86.5	\$111.3	79.2%
Snyder	\$99.3	\$103.5	\$111.6	\$111.4	\$110.9	\$81.0	\$104.5	94.3%
Union	\$142.6	\$142.0	\$150.0	\$151.0	\$153.6	\$112.6	\$145.4	94.7%
Region Total	\$619.8	\$627.2	\$665.4	\$679.1	\$671.5	\$483.6	\$625.5	93.1%
% Change	0.4%	1.2%	6.1%	2.0%	-1.1%	-28.0%	29.3%	

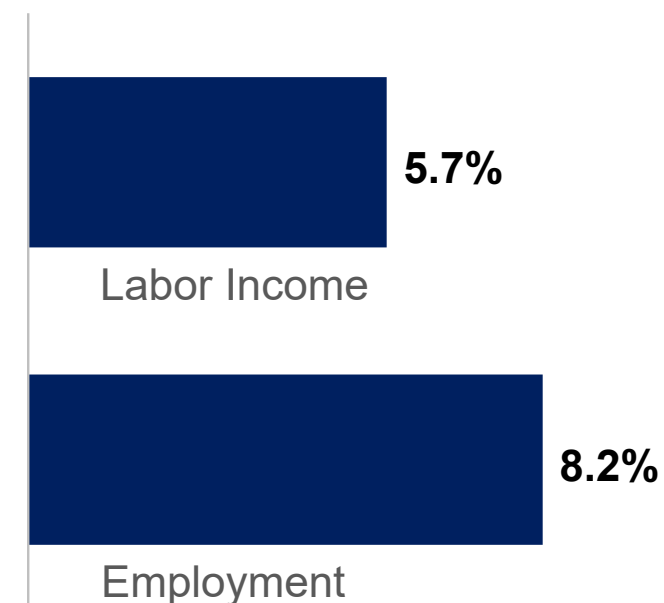
	2015	2016	2017	2018	2019	2020	2021	% relative to 2019
Columbia	1,292	1,302	1,339	1,369	1,364	1,079	1,212	88.9%
Montour	902	926	937	965	973	808	844	86.8%
Northumberland	1,101	1,107	1,128	1,129	1,152	849	978	84.9%
Snyder	764	776	790	803	811	672	760	93.6%
Union	1,216	1,243	1,271	1,293	1,314	1,035	1,120	85.3%
Region Total	5,275	5,353	5,465	5,558	5,614	4,443	4,915	87.6%
% Change	0.9%	1.5%	2.1%	1.7%	1.0%	-20.9%	10.6%	

Source: Tourism Economics

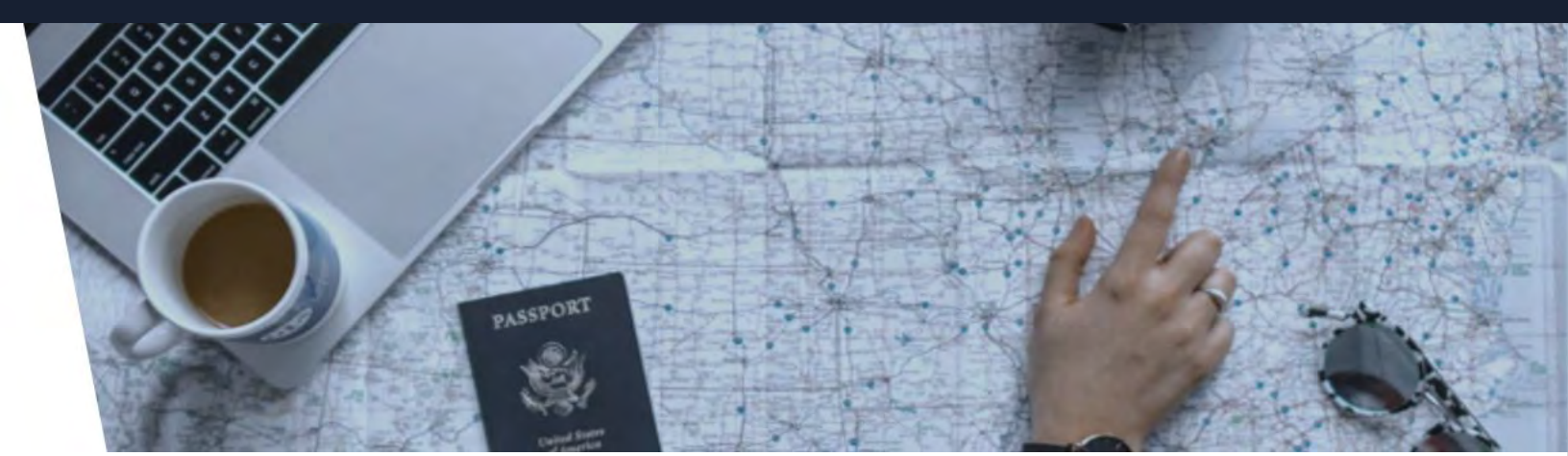
The 4,915 employed in the region's travel- and tourism-related industry represented nearly 1-in-12 jobs in the Valleys of the Susquehanna region in 2021.

Travel and Tourism Share of Region's Economy

Percent of region's total payroll employment and labor income



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



THE ALLEGHENIES VISITOR SPENDING

While visitor spending rose 28% in The Alleghenies region in 2021, it remained 15% below its 2019 pre-pandemic level.

Visitor Spending By Category, 2020 & 2021

Amounts in \$millions, % change 2020-2021

By 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
Region Total	\$210.3	\$415.7	\$321.0	\$285.2	\$570.0	\$1,802.2
% Change	40.0%	18.5%	19.2%	28.1%	35.8%	27.6%

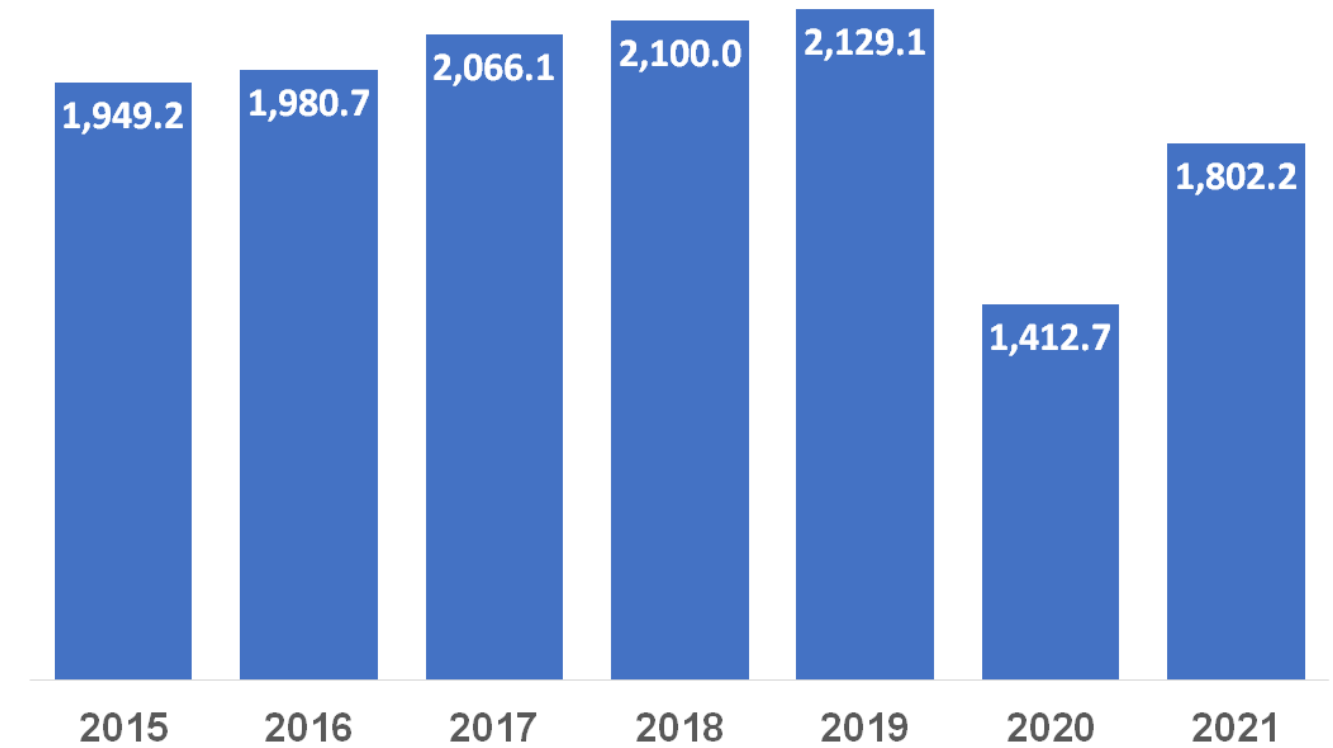
By County, 2020	Lodging	Food & beverages	Retail	Recreation	Transportation	Total
Bedford	\$27.1	\$49.6	\$38.3	\$33.8	\$62.2	\$211.1
Blair	\$25.7	\$63.5	\$51.6	\$36.3	\$80.9	\$258.0
Cambria	\$14.0	\$49.0	\$39.0	\$35.3	\$67.8	\$205.2
Centre	\$63.4	\$126.9	\$96.2	\$76.0	\$133.2	\$495.6
Fulton	\$1.2	\$4.1	\$3.4	\$2.9	\$5.5	\$17.2
Huntingdon	\$13.0	\$35.4	\$25.2	\$26.3	\$43.4	\$143.2
Juniata	\$1.4	\$7.0	\$5.4	\$4.8	\$9.4	\$28.0
Mifflin	\$4.6	\$15.3	\$10.0	\$7.1	\$17.4	\$54.4
Region Total	\$150.2	\$350.9	\$269.2	\$222.5	\$419.8	\$1,412.7

Lodging includes spending at/or second homes.
Transportation includes both ground and air transportation.

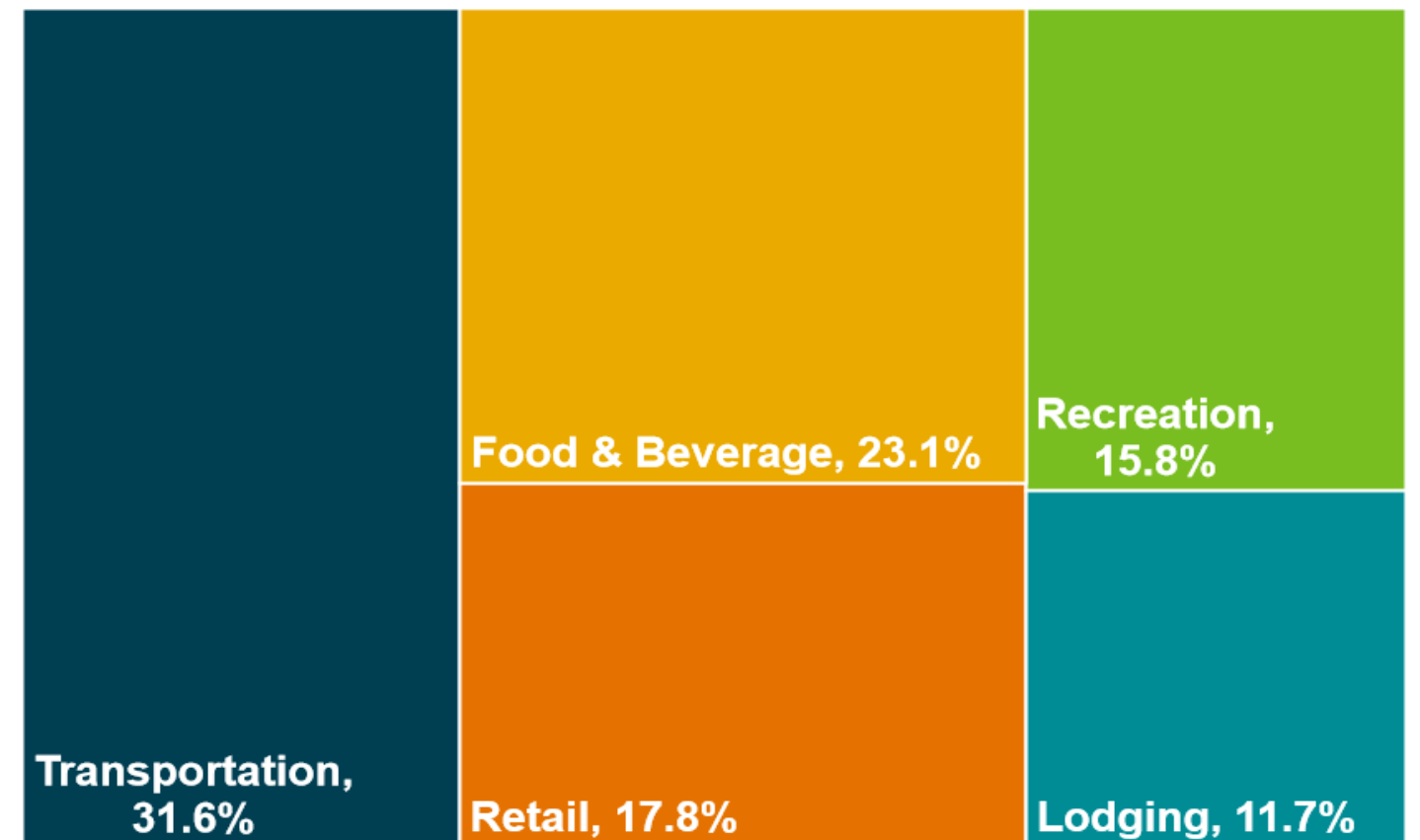
Sources: STR, County room tax revenues, PA Department of Revenue, Tourism Economics

The Alleghenies Visitor Spending, 2015-2021

Amounts in \$millions



Visitor Spending By Category, 2021 Percent of Total



Source: Tourism Economics

THE ALLEGHENIES ECONOMIC IMPACTS

Travel and Tourism Industry (direct) Impacts, 2020 & 2021

Amounts in \$millions, except employment (in units), % change 2020-2021

By County, 2021	Visitor		Labor Income	Taxes	
	Spend	Employment		State/Local	Federal
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
Region Total	\$1,802.2	13,228	\$427.7	\$95.6	\$108.1
% Change	27.6%	12.6%	18.6%	18.5%	11.9%
By County, 2020					
Bedford	\$211.1	1,639	\$43.1	\$10.9	\$12.7
Blair	\$258.0	2,298	\$70.6	\$15.4	\$18.4
Cambria	\$205.2	1,716	\$57.7	\$12.2	\$14.9
Centre	\$495.6	3,870	\$129.0	\$28.5	\$34.3
Fulton	\$17.2	135	\$3.4	\$0.9	\$1.0
Huntingdon	\$143.2	1,300	\$36.9	\$8.2	\$9.9
Juniata	\$28.0	203	\$4.9	\$1.4	\$1.5
Mifflin	\$54.4	585	\$15.1	\$3.2	\$3.9
Region Total	\$1,412.7	11,744	\$360.6	\$80.7	\$96.7

Source: Tourism Economics

Travel & Tourism Economy (total) Impacts, 2020 & 2021

Amounts in \$millions, except employment (in units), % change 2020-2021

By County, 2021	Visitor		Labor Income	Taxes	
	Spend	Employment		State/Local	Federal
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
Region Total	\$1,915.0	20,952	\$823.3	\$181.8	\$193.9
% Change	26.0%	9.9%	14.7%	16.2%	11.7%
By County, 2020					
Bedford	\$226.9	2,489	\$88.9	\$21.2	\$22.8
Blair	\$277.5	3,733	\$135.8	\$29.7	\$33.1
Cambria	\$220.5	2,963	\$108.9	\$23.7	\$26.8
Centre	\$533.6	6,194	\$269.6	\$55.3	\$61.7
Fulton	\$18.5	249	\$6.6	\$1.7	\$1.8
Huntingdon	\$154.5	1,991	\$68.8	\$16.0	\$17.7
Juniata	\$30.2	415	\$9.3	\$2.7	\$2.8
Mifflin	\$58.6	1,025	\$29.9	\$6.3	\$7.0
Region Total	\$1,520.3	19,059	\$717.8	\$156.4	\$173.7

Source: Tourism Economics

THE ALLEGHENIES

VISITOR SPENDING & EMPLOYMENT TIMELINES

Employment directly supported by visitor spending rose 13%, or by nearly 1,500 jobs in 2021, but remained 11% below its 2019 pre-pandemic level.

Visitor Spending & Travel Industry Employment Timelines, 2015-2021

Visitor spending in \$millions, employment in units, % 2021 relative to 2019

	2015	2016	2017	2018	2019	2020	2021	% relative to 2019
Bedford	\$284.9	\$287.3	\$297.4	\$308.4	\$307.1	\$211.1	\$258.6	84.2%
Blair	\$324.9	\$335.2	\$358.0	\$358.1	\$374.4	\$258.0	\$326.4	87.2%
Cambria	\$308.1	\$310.9	\$315.8	\$316.4	\$310.7	\$205.2	\$251.1	80.8%
Centre	\$741.8	\$748.5	\$794.2	\$809.1	\$823.4	\$495.6	\$660.2	80.2%
Fulton	\$23.3	\$23.5	\$24.7	\$25.3	\$26.1	\$17.2	\$22.1	84.8%
Huntingdon	\$163.9	\$166.5	\$173.0	\$176.6	\$178.6	\$143.2	\$175.6	98.3%
Juniata	\$37.2	\$36.7	\$36.7	\$36.8	\$35.9	\$28.0	\$36.5	101.6%
Mifflin	\$65.2	\$72.0	\$66.4	\$69.4	\$72.9	\$54.4	\$71.7	98.3%
Region Total	\$1,949.2	\$1,980.7	\$2,066.1	\$2,100.0	\$2,129.1	\$1,412.7	\$1,802.2	84.6%
% Change	2.3%	1.6%	4.3%	1.6%	1.4%	-33.6%	27.6%	

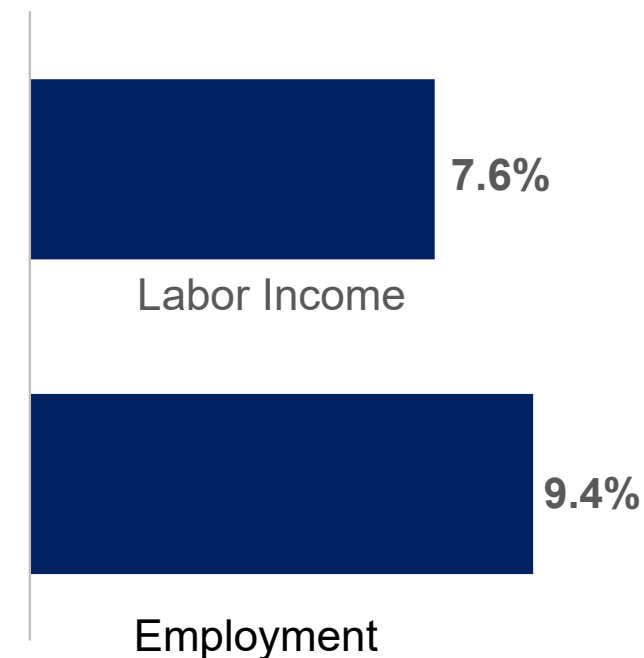
	2015	2016	2017	2018	2019	2020	2021	% relative to 2019
Bedford	2,042	2,054	2,080	2,174	2,172	1,639	1,839	84.7%
Blair	2,665	2,758	2,796	2,779	2,841	2,298	2,639	92.9%
Cambria	2,025	2,061	2,047	2,076	2,090	1,716	1,922	92.0%
Centre	4,935	5,004	5,049	5,120	5,219	3,870	4,308	82.5%
Fulton	158	161	167	174	177	135	150	84.8%
Huntingdon	1,356	1,394	1,421	1,444	1,470	1,300	1,476	100.4%
Juniata	226	231	232	233	230	203	232	100.9%
Mifflin	618	641	651	663	688	585	661	96.1%
Region Total	14,024	14,306	14,443	14,665	14,888	11,744	13,228	88.9%
% Change	1.4%	2.0%	1.0%	1.5%	1.5%	-21.1%	12.6%	

Source: Tourism Economics

The 13,230 employed in the region's travel- and tourism-related industry represented nearly 1-in-11 jobs in The Alleghenies region in 2021.

Travel and Tourism Share of Region Economy, 2021

Percent of payroll employment and income



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



DUTCH COUNTRY ROADS VISITOR SPENDING

While visitor spending rose 34% in the Dutch Country Roads region in 2021, it remained 13% below its 2019 pre-pandemic level.

Visitor Spending By Category, 2020 & 2021

Amounts in \$millions, % change 2020-2021

By 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
Region Total	\$977.6	\$1,781.6	\$1,485.8	\$1,578.7	\$2,111.8	\$7,935.5
% Change	49.6%	22.1%	24.9%	39.3%	40.0%	33.5%

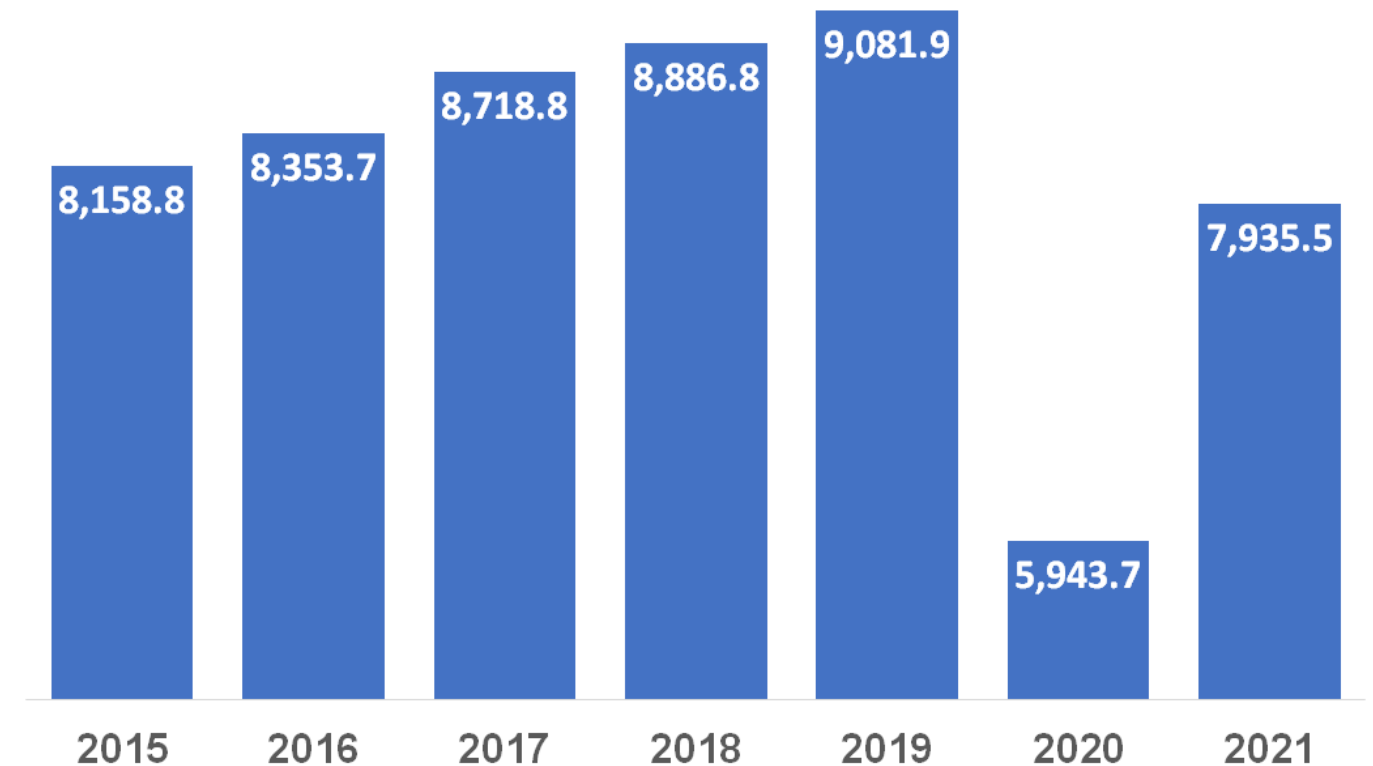
By County, 2020	Lodging	Food & beverages	Retail	Recreation	Transportation	Total
Adams	\$48.1	\$107.8	\$98.6	\$110.2	\$116.0	\$480.7
Berks	\$60.4	\$167.7	\$136.6	\$109.9	\$187.2	\$661.8
Cumberland	\$71.9	\$165.2	\$119.9	\$105.7	\$155.1	\$617.7
Dauphin	\$187.0	\$335.2	\$264.3	\$334.4	\$354.9	\$1,475.8
Franklin	\$24.8	\$67.3	\$46.0	\$45.2	\$67.8	\$251.1
Lancaster	\$174.6	\$366.1	\$332.4	\$271.7	\$350.7	\$1,495.6
Lebanon	\$15.8	\$48.6	\$37.9	\$29.5	\$55.5	\$187.3
Perry	\$1.2	\$9.7	\$7.4	\$5.5	\$12.9	\$36.7
York	\$69.6	\$191.7	\$146.3	\$121.3	\$208.1	\$737.0
Region Total	\$653.5	\$1,459.3	\$1,189.4	\$1,133.4	\$1,508.2	\$5,943.7

Lodging includes spending at/on second homes.
Transportation includes both ground and air transportation.

Source: STR, County room tax revenues, PA Department of Revenue, Tourism Economics

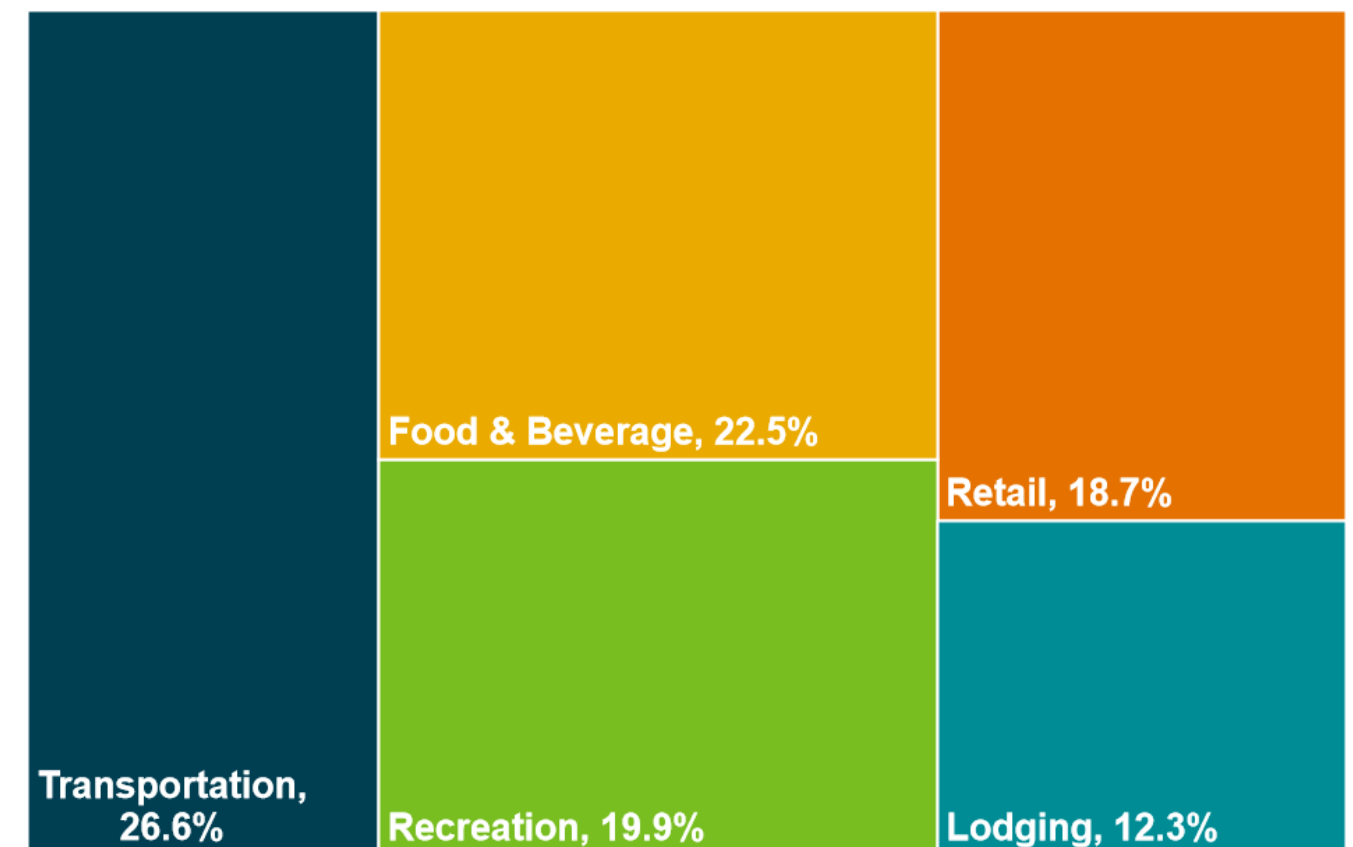
Dutch Country Roads Visitor Spending, 2015-2021

Amounts in \$millions



Visitor Spending By Category, 2021

Percent of total



Source: Tourism Economics

DUTCH COUNTRY ROADS ECONOMIC IMPACTS

Tourism Satellite Account - Demand Measures, 2020 & 2021

Amounts in \$millions, % change 2020-2021

By 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
Region Total	\$7,935.5	\$42.0	\$444.4	\$8,421.9
% Change	33.5%	58.6%	5.8%	31.8%

By County, 2020	Visitor Spending	Government	Investment/ PCE	Total Tourism Demand
Adams	\$480.7	\$1.9	\$34.0	\$516.7
Berks	\$661.8	\$2.6	\$46.7	\$711.1
Cumberland	\$617.7	\$2.0	\$43.6	\$663.3
Dauphin	\$1,475.8	\$8.1	\$104.0	\$1,587.9
Franklin	\$251.1	\$1.0	\$17.9	\$270.0
Lancaster	\$1,495.6	\$6.9	\$105.5	\$1,607.9
Lebanon	\$187.3	\$0.7	\$13.3	\$201.3
Perry	\$36.7	\$0.0	\$2.8	\$39.6
York	\$737.0	\$3.1	\$52.0	\$792.2
Region Total	\$5,943.7	\$26.5	\$419.9	\$6,390.1

Source: Tourism Economics

DUTCH COUNTRY ROADS ECONOMIC IMPACTS

Travel & Tourism Industry (direct) Impacts, 2020 & 2021

Amounts in \$millions, except employment (in units), % change 2020-2021

By County, 2021	Visitor		Labor Income	Taxes	
	Spend	Employment		State/Local	Federal
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
Region Total	\$7,935.5	59,574	\$2,100.3	\$442.4	\$510.9
% Change	33.5%	12.7%	22.6%	22.0%	16.4%
By County, 2020					
Adams	\$480.7	4,143	\$121.4	\$27.6	\$32.7
Berks	\$661.8	5,469	\$177.4	\$38.8	\$46.7
Cumberland	\$617.7	5,116	\$159.8	\$35.3	\$42.6
Dauphin	\$1,475.8	14,578	\$534.4	\$101.7	\$127.0
Franklin	\$251.1	2,148	\$61.5	\$14.2	\$16.7
Lancaster	\$1,495.6	13,151	\$403.8	\$89.0	\$106.0
Lebanon	\$187.3	1,441	\$45.7	\$10.6	\$12.5
Perry	\$36.7	304	\$7.1	\$1.8	\$2.1
York	\$737.0	6,512	\$201.6	\$43.8	\$52.7
Region Total	\$5,943.7	52,863	\$1,712.7	\$362.7	\$439.0

Source: Tourism Economics

Travel and Tourism Economy (total) Impacts, 2020 & 2021

Amounts in \$millions, except employment (in units), % change 2020-2021

By County, 2021	Visitor		Labor Income	Taxes	
	Spend	Employment		State/Local	Federal
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
Region Total	\$8,421.9	93,227	\$4,068.4	\$841.1	\$915.4
% Change	31.8%	10.3%	16.6%	20.1%	16.2%
By County, 2020					
Adams	\$516.7	6,471	\$246.9	\$53.2	\$58.7
Berks	\$711.1	9,553	\$362.8	\$75.1	\$83.8
Cumberland	\$663.3	8,109	\$330.0	\$68.6	\$76.6
Dauphin	\$1,587.9	21,596	\$1,091.3	\$196.0	\$227.4
Franklin	\$270.0	3,650	\$122.9	\$27.4	\$30.1
Lancaster	\$1,607.9	20,849	\$816.5	\$171.3	\$190.3
Lebanon	\$201.3	2,609	\$92.5	\$20.4	\$22.4
Perry	\$39.6	649	\$14.1	\$3.5	\$3.8
York	\$792.2	11,007	\$412.5	\$84.6	\$94.6
Region Total	\$6,390.1	84,494	\$3,489.5	\$700.3	\$787.8

Source: Tourism Economics

DUTCH COUNTRY ROADS

Visitor Spending and Employment Timelines

Employment directly supported by visitor spending rose 13%, or by more than 6,700 jobs in 2021, but remained 14% below its 2019 pre-pandemic level.

Visitor Spending & Travel Industry Employment Timelines, 2015-2021

Visitor spending in \$millions, employment in units, % 2021 relative to 2019

	2015	2016	2017	2018	2019	2020	2021	% relative to 2019
Adams	\$686.7	\$691.2	\$725.9	\$735.0	\$750.7	\$480.7	\$630.4	84.0%
Berks	\$824.4	\$857.0	\$901.9	\$930.7	\$950.1	\$661.8	\$854.3	89.9%
Cumberland	\$816.6	\$838.7	\$881.8	\$892.8	\$897.2	\$617.7	\$775.0	86.4%
Dauphin	\$2,335.9	\$2,356.1	\$2,459.6	\$2,476.3	\$2,566.3	\$1,475.8	\$2,005.9	78.2%
Franklin	\$326.7	\$317.6	\$327.5	\$332.6	\$337.5	\$251.1	\$325.1	96.3%
Lancaster	\$1,975.4	\$2,065.5	\$2,138.4	\$2,200.1	\$2,229.6	\$1,495.6	\$2,124.7	95.3%
Lebanon	\$201.4	\$205.6	\$217.8	\$249.0	\$256.6	\$187.3	\$258.8	100.8%
Perry	\$47.9	\$48.3	\$49.6	\$50.6	\$52.4	\$36.7	\$47.2	90.2%
York	\$943.7	\$973.5	\$1,016.3	\$1,019.6	\$1,041.6	\$737.0	\$914.0	87.8%
Region Total	\$8,158.8	\$8,353.7	\$8,718.8	\$8,886.8	\$9,081.9	\$5,943.7	\$7,935.5	87.4%
% Change	2.4%	2.4%	4.4%	1.9%	2.2%	-34.6%	33.5%	

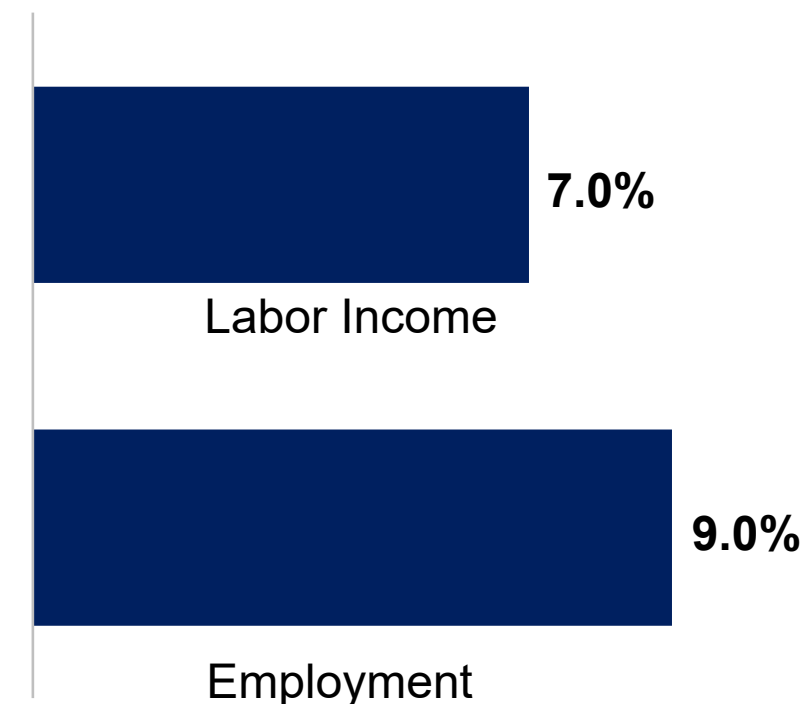
	2015	2016	2017	2018	2019	2020	2021	% relative to 2019
Adams	5,105	5,199	5,272	5,343	5,392	4,143	4,570	84.8%
Berks	6,622	6,828	6,901	7,051	7,165	5,469	5,970	83.3%
Cumberland	6,239	6,304	6,442	6,554	6,592	5,116	5,719	86.7%
Dauphin	18,846	19,036	19,368	19,382	19,818	14,578	16,445	83.0%
Franklin	2,444	2,513	2,533	2,583	2,632	2,148	2,398	91.1%
Lancaster	15,853	16,310	16,554	16,747	17,145	13,151	15,117	88.2%
Lebanon	1,655	1,695	1,714	1,759	1,807	1,441	1,686	93.4%
Perry	340	347	346	345	346	304	360	104.2%
York	7,709	7,913	8,010	8,046	8,108	6,512	7,307	90.1%
Region Total	64,814	66,147	67,141	67,810	69,005	52,863	59,574	86.3%
Percent Change	0.7%	2.1%	1.5%	1.0%	1.8%	-23.4%	12.7%	

Source: Tourism Economics

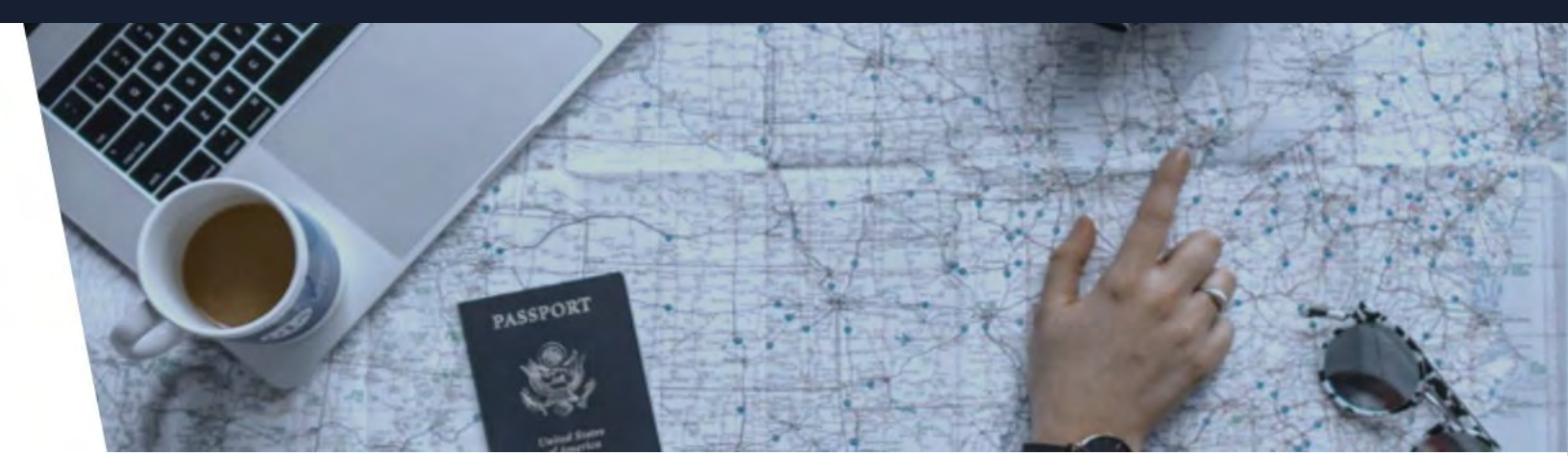
The 59,570 employed in the region's travel- and tourism-related industry represented nearly 1-in-11 jobs in the Dutch Country Roads region in 2021.

Travel and Tourism Share of Region's Economy, 2021

Percent of region's total payroll employment and labor income



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



POCONO MOUNTAINS VISITOR SPENDING

With visitor spending rising 35% in the Pocono Mountains region in 2021, it was the only region to surpass its 2019 pre-pandemic level.

Visitor Spending By Category, 2020 & 2021

Amounts in \$millions, % change 2020-2021

By County, 2021	Lodging	Food & beverages	Retail	Recreation	Transportation	Total
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
Region Total	\$684.0	\$925.4	\$795.9	\$792.9	\$1,139.6	\$4,337.8
% Change	51.1%	24.4%	28.8%	38.8%	39.4%	35.4%
By County, 2020						
Carbon	\$54.0	\$87.9	\$55.2	\$77.2	\$101.4	\$375.5
Monroe	\$281.2	\$417.1	\$387.6	\$325.9	\$432.0	\$1,843.8
Pike	\$68.7	\$135.9	\$99.8	\$89.5	\$161.8	\$555.7
Wayne	\$48.9	\$102.9	\$75.3	\$78.8	\$122.3	\$428.3
Region Total	\$452.8	\$743.9	\$617.9	\$571.3	\$817.5	\$3,203.4

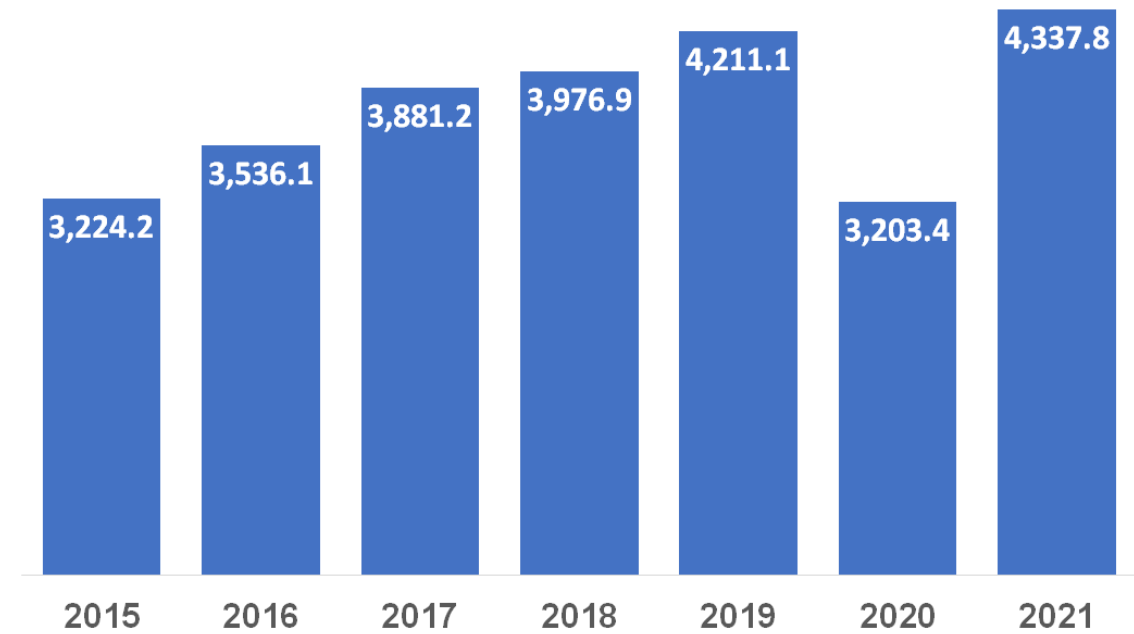
Lodging includes spending at/om second homes.

Transportation includes both ground and air transportation.

Sources: STR, County room tax revenues, PA Department of Revenue, Tourism Economics

Pocono Mountains Visitor Spending, 2015-2021

Amounts in \$millions



Source: Tourism Economics

Visitor Spending by Category, 2021

Percent of Total



Source: Tourism Economics

POCONO MOUNTAINS ECONOMIC IMPACTS

Tourism Satellite Account - Demand Measures, 2020 & 2021

Amounts in \$millions, % change 2020-2021

By County, 2021	Visitor Spending	Government	Investment/PCE	Total Tourism Demand
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
Region Total	\$4,337.8	\$21.7	\$258.2	\$4,617.7
% Change	35.4%	69.3%	7.8%	33.6%
By County, 2020				
Carbon	\$375.5	\$1.8	\$27.5	\$404.9
Monroe	\$1,843.8	\$7.7	\$135.3	\$1,986.9
Pike	\$555.7	\$1.9	\$44.0	\$601.6
Wayne	\$428.3	\$1.3	\$32.6	\$462.2
Region Total	\$3,203.4	\$12.8	\$239.4	\$3,455.6

Source: Tourism Economics

Travel Industry (direct) Impacts, 2020 & 2021

Amounts in \$millions, except employment (in units), % change 2020-2021

By County, 2021	Visitor		Labor Income	Taxes	
	Spend	Employment		State/Local	Federal
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
Region Total	\$4,337.8	24,478	\$963.9	\$225.0	\$249.7
% Change	35.4%	13.2%	23.3%	24.4%	17.1%
By County, 2020					
Carbon	\$375.5	2,491	\$67.5	\$19.3	\$21.0
Monroe	\$1,843.8	11,564	\$452.7	\$104.8	\$123.2
Pike	\$555.7	4,682	\$162.0	\$33.5	\$41.4
Wayne	\$428.3	2,895	\$99.5	\$23.3	\$27.7
Region Total	\$3,203.4	21,632	\$781.6	\$180.9	\$213.2

Travel Economy (total) Impacts, 2020 & 2021

Amounts in \$millions, except employment (in units), % change 2020-2021

By County, 2021	Visitor		Labor Income	Taxes	
	Spend	Employment		State/Local	Federal
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
Region Total	\$4,617.7	35,818	\$1,826.0	\$426.8	\$448.3
% Change	33.6%	11.1%	17.1%	22.2%	16.9%
By County, 2020					
Carbon	\$404.9	3,828	\$134.9	\$36.7	\$37.9
Monroe	\$1,986.9	17,343	\$907.8	\$201.9	\$221.5
Pike	\$601.6	6,721	\$325.4	\$65.3	\$74.2
Wayne	\$462.2	4,359	\$191.3	\$45.4	\$49.8
Region Total	\$3,455.6	32,252	\$1,559.3	\$349.3	\$383.4

Source: Tourism Economics

POCONO MOUNTAINS VISITOR SPENDING & EMPLOYMENT TIMELINES

Employment directly supported by visitor spending rose 13%, or by nearly 2,850 jobs in 2021, but remained 9% below its 2019 pre-pandemic level.

Visitor Spending & Travel Industry Employment Timelines, 2015-2021

Visitor spending in \$millions, employment in units, % 2021 relative to 2019

	2015	2016	2017	2018	2019	2020	2021	% relative to 2019
Carbon	\$366.3	\$393.9	\$426.5	\$425.3	\$447.6	\$375.5	\$502.5	112.3%
Monroe	\$1,788.2	\$2,034.7	\$2,300.5	\$2,351.7	\$2,509.2	\$1,843.8	\$2,584.1	103.0%
Pike	\$636.6	\$663.7	\$691.9	\$720.9	\$737.3	\$555.7	\$692.8	94.0%
Wayne	\$433.1	\$443.8	\$462.3	\$478.9	\$517.1	\$428.3	\$558.4	108.0%
Region Total	\$3,224.2	\$3,536.1	\$3,881.2	\$3,976.9	\$4,211.2	\$3,203.4	\$4,337.8	103.0%
% Change	8.3%	9.7%	9.8%	2.5%	5.9%	-23.9%	35.4%	

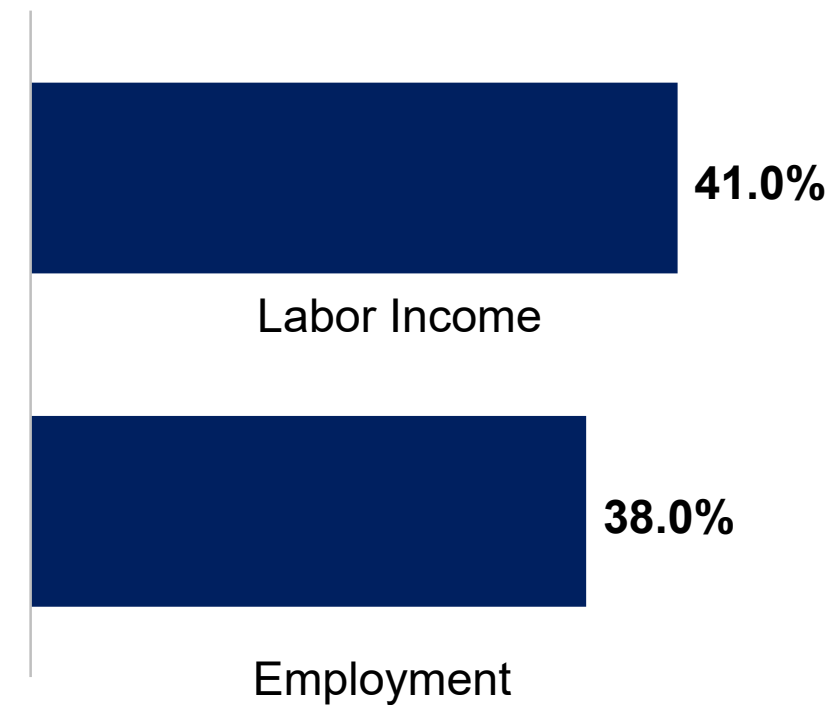
	2015	2016	2017	2018	2019	2020	2021	% relative to 2019
Carbon	2,759	2,897	2,947	2,938	3,008	2,491	2,889	96.0%
Monroe	13,411	14,051	14,488	14,464	14,749	11,564	12,978	88.0%
Pike	5,084	5,229	5,322	5,457	5,574	4,682	5,258	94.3%
Wayne	3,103	3,198	3,253	3,371	3,511	2,895	3,354	95.5%
Region Total	24,358	25,375	26,011	26,231	26,842	21,632	24,478	91.2%
% Change	3.3%	4.2%	2.5%	0.8%	2.3%	-19.4%	13.2%	

Source: Tourism Economics

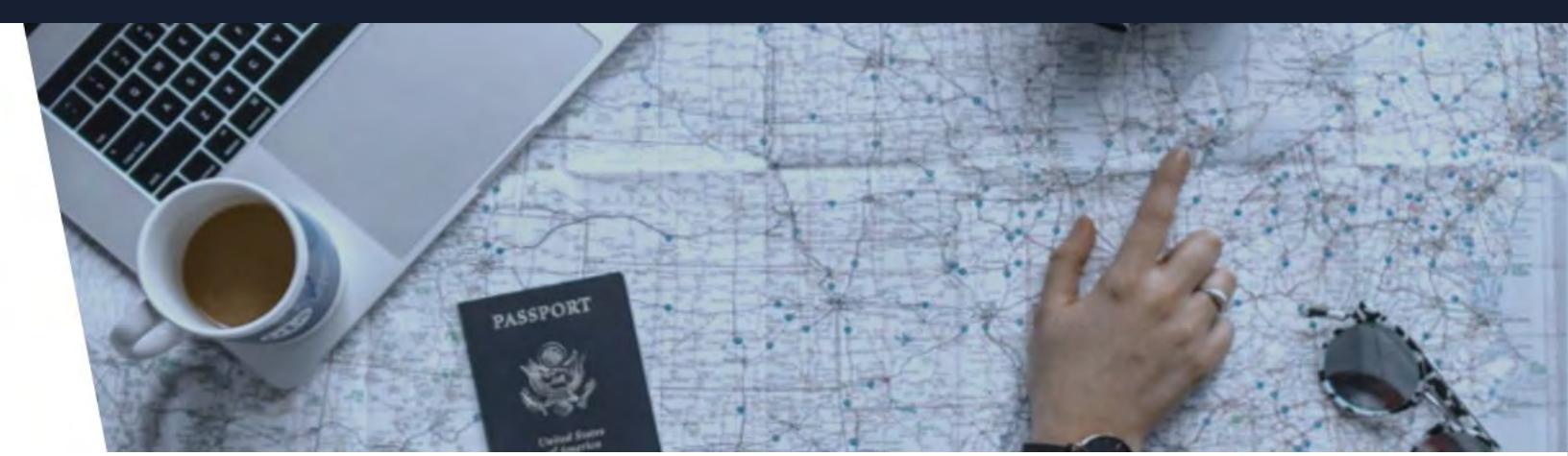
The 24,480 employed in the region's travel- and tourism-related industry represented nearly 1-in-3 jobs in the Pocono Mountains region in 2021.

Travel and Tourism Share of Region's Economy, 2021

Percent of regions total payroll employment and labor income



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



UPSTATE PA VISITOR SPENDING

While visitor spending rose 29% in the Upstate PA region in 2021, it remained 8% below its 2019 pre-pandemic level.

Visitor Spending By Category, 2020 & 2021

Amounts in \$millions, % change 2020-2021

By 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
Region Total	\$244.3	\$517.7	\$395.3	\$390.0	\$648.6	\$2,195.9
% Change	37.7%	18.2%	21.0%	33.9%	37.5%	28.8%

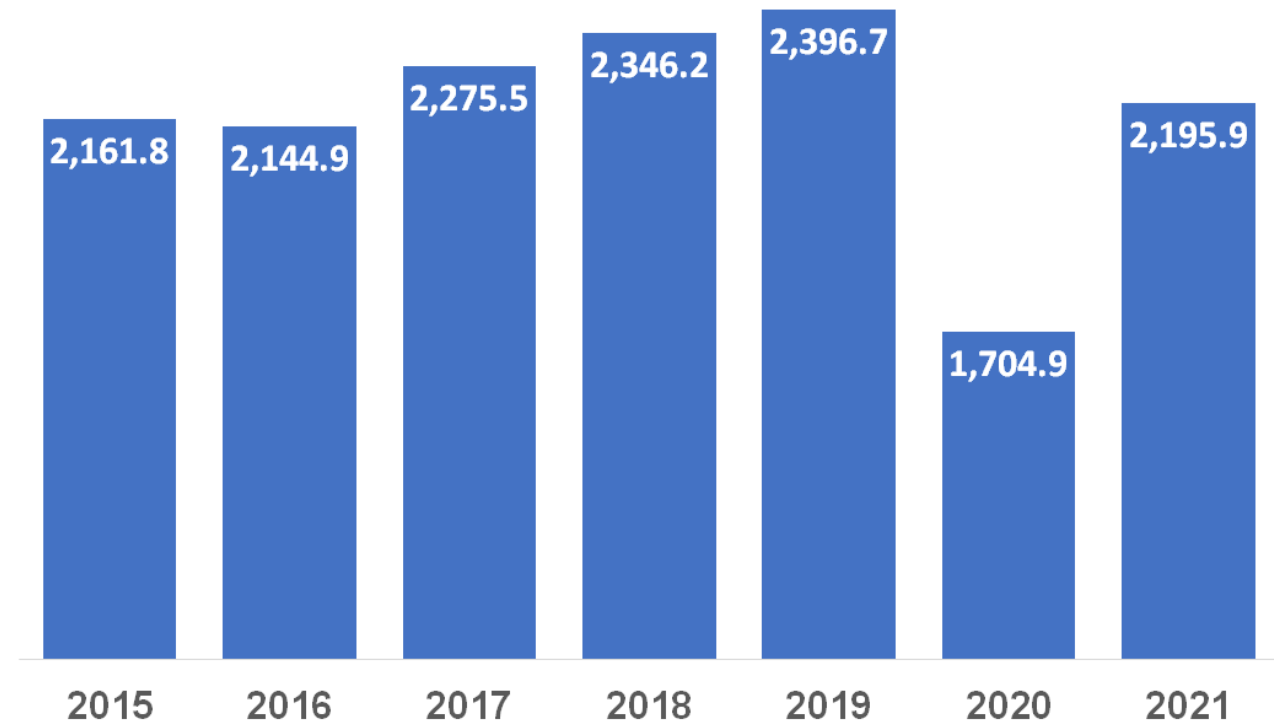
By County, 2020	Lodging	Food & beverages	Retail	Recreation	Transportation	Total
Bradford	\$16.2	\$39.3	\$28.7	\$26.1	\$50.7	\$161.0
Lackawanna	\$52.4	\$129.7	\$104.4	\$84.6	\$113.0	\$484.1
Luzerne	\$74.9	\$176.6	\$125.3	\$116.4	\$192.1	\$685.3
Schuylkill	\$15.1	\$46.2	\$31.7	\$28.4	\$53.1	\$174.4
Sullivan	\$2.6	\$3.8	\$3.2	\$5.1	\$4.5	\$19.2
Susquehanna	\$8.8	\$29.9	\$21.2	\$22.3	\$43.6	\$125.9
Wyoming	\$7.4	\$12.5	\$12.1	\$8.3	\$14.7	\$55.1
Region Total	\$177.4	\$438.1	\$326.7	\$291.2	\$471.6	\$1,704.9

Lodging includes spending at/on second homes.
Transportation includes both ground and air transportation.

Sources: STR, County room tax revenues, PA Department of Revenue, Tourism Economics

UPSTATE PA Visitor Spending, 2015-2021

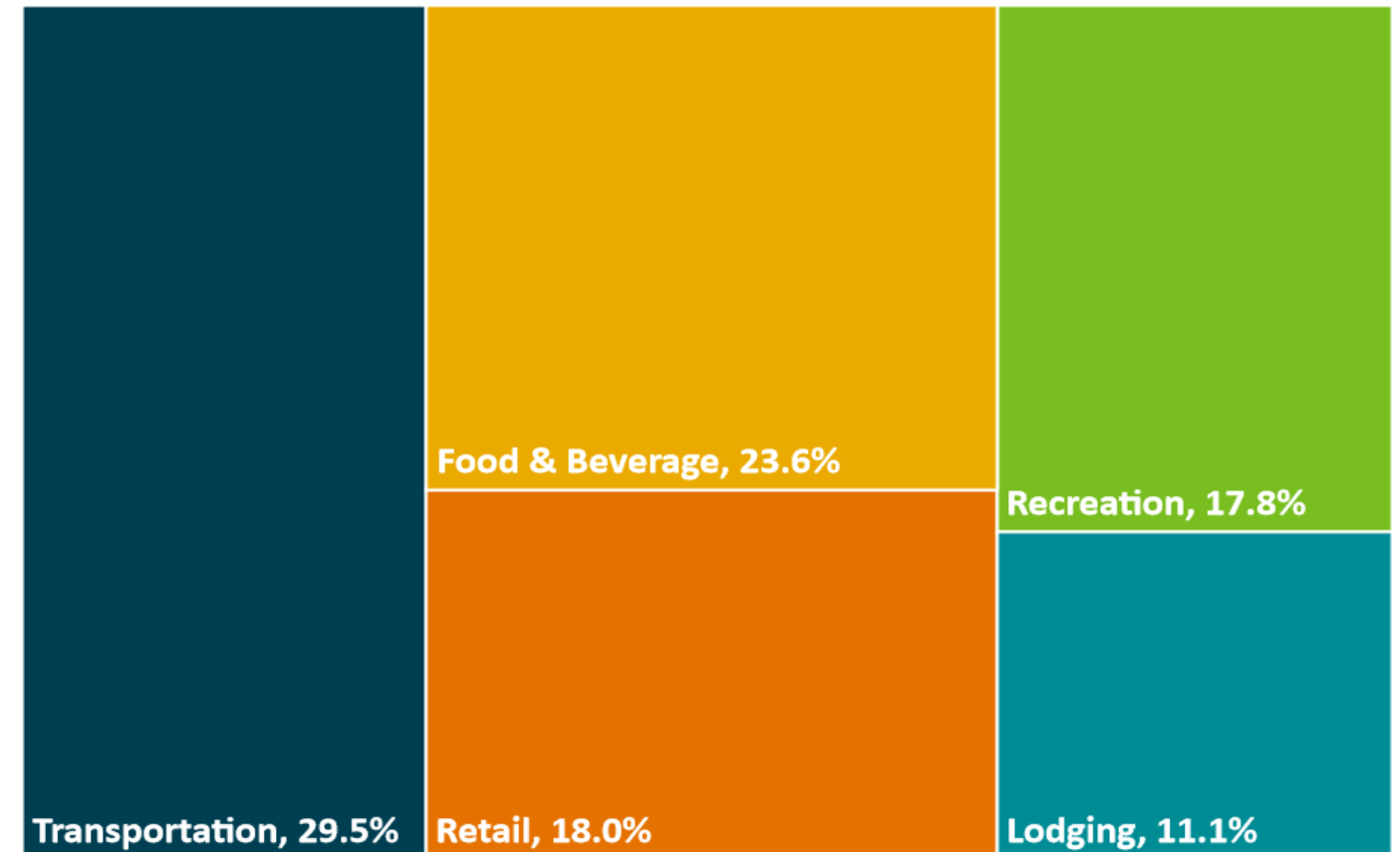
Amounts in \$ millions



Source: Tourism Economics

Visitor Spending By Category, 2021

Percent of total



Source: Tourism Economics

UPSTATE PA ECONOMIC IMPACTS

Tourism Satellite Account - Demand Measures, 2020 & 2021

Amounts in \$millions, % change 2020-2021

By County, 2021	Visitor Spending	Government	Investment/ PCE	Total Tourism Demand
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
Region Total	\$2,195.9	\$11.3	\$127.2	\$2,334.3
% Change	28.8%	47.2%	2.7%	27.1%

By County, 2020	Visitor Spending	Government	Investment/ PCE	Total Tourism Demand
Bradford	\$161.0	\$0.5	\$11.9	\$173.4
Lackawanna	\$484.1	\$2.7	\$34.7	\$521.5
Luzerne	\$685.3	\$3.0	\$49.0	\$737.3
Schuylkill	\$174.4	\$0.7	\$12.5	\$187.6
Sullivan	\$19.2	\$0.1	\$1.9	\$21.2
Susquehanna	\$125.9	\$0.3	\$9.6	\$135.8
Wyoming	\$55.1	\$0.3	\$4.2	\$59.6
Region Total	\$1,704.9	\$7.7	\$123.8	\$1,836.4

Source: Tourism Economics

UPSTATE PA ECONOMIC IMPACTS

Travel and Tourism Industry (direct) Impacts, 2020 & 2021

Amounts in \$millions, except employment (in units), % change 2020-2021

By County, 2021	Visitor	Employment	Labor Income	Taxes	
	Spend			State/Local	Federal
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
Region Total	\$2,195.9	15,418	\$534.7	\$118.2	\$133.9
% Change	28.8%	12.9%	23.2%	19.6%	15.0%
By County, 2020					
Bradford	\$161.0	1,280	\$37.7	\$8.8	\$10.4
Lackawanna	\$484.1	4,113	\$124.0	\$28.7	\$33.2
Luzerne	\$685.3	5,588	\$191.1	\$41.2	\$49.6
Schuylkill	\$174.4	1,157	\$40.9	\$9.7	\$11.3
Sullivan	\$19.2	165	\$4.1	\$1.0	\$1.2
Susquehanna	\$125.9	987	\$25.5	\$6.4	\$7.5
Wyoming	\$55.1	370	\$10.6	\$2.9	\$3.2
Region Total	\$1,704.9	13,659	\$433.9	\$98.8	\$116.4

Source: Tourism Economics

Travel and Tourism Economy (total) Impacts, 2020 & 2021

Amounts in \$millions, except employment (in units), % change 2020-2021

By County, 2021	Visitor	Employment	Labor Income	Taxes	
	Spend			State/Local	Federal
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
Region Total	\$2,334.3	24,790	\$1,016.3	\$224.4	\$240.1
% Change	27.1%	9.9%	16.6%	18.0%	14.8%
By County, 2020					
Bradford	\$173.4	1,964	\$66.9	\$17.1	\$18.8
Lackawanna	\$521.5	6,650	\$252.2	\$54.7	\$59.6
Luzerne	\$737.3	9,285	\$401.2	\$79.5	\$89.0
Schuylkill	\$187.6	2,238	\$76.0	\$18.7	\$20.4
Sullivan	\$21.2	239	\$6.8	\$2.0	\$2.1
Susquehanna	\$135.8	1,568	\$47.2	\$12.6	\$13.5
Wyoming	\$59.6	605	\$21.2	\$5.6	\$5.8
Region Total	\$1,836.4	22,549	\$871.5	\$190.1	\$209.3

Source: Tourism Economics

UPSTATE PA VISITOR SPENDING & EMPLOYMENT TIMELINES

Employment directly supported by visitor spending rose 13%, or by 1,760 jobs in 2021, but remained 11% below its 2019 pre-pandemic level.

Visitor Spending & Travel Industry Employment Timelines, 2015-2021

Visitor spending in \$millions, employment in units, % 2021 relative to 2019

	2015	2016	2017	2018	2019	2020	2021	% relative to 2019
Bradford	\$211.8	\$196.0	\$206.1	\$217.8	\$214.7	\$161.0	\$194.1	90.4%
Lackawanna	\$618.4	\$605.8	\$649.9	\$667.2	\$689.1	\$484.1	\$623.7	90.5%
Luzerne	\$889.7	\$914.2	\$965.3	\$989.0	\$1,015.7	\$685.3	\$897.7	88.4%
Schuylkill	\$206.2	\$206.2	\$216.5	\$223.5	\$222.1	\$174.4	\$222.9	100.4%
Sullivan	\$17.6	\$17.7	\$20.3	\$21.9	\$21.5	\$19.2	\$24.8	115.6%
Susquehanna	\$157.1	\$153.4	\$157.4	\$163.0	\$168.4	\$125.9	\$170.5	101.3%
Wyoming	\$61.2	\$51.6	\$60.0	\$63.8	\$65.4	\$55.1	\$62.2	95.2%
Region Total	\$2,161.8	\$2,144.9	\$2,275.5	\$2,346.2	\$2,396.7	\$1,704.9	\$2,195.9	91.6%
% Change	-0.8%	-0.8%	6.1%	3.1%	2.2%	-28.9%	28.8%	

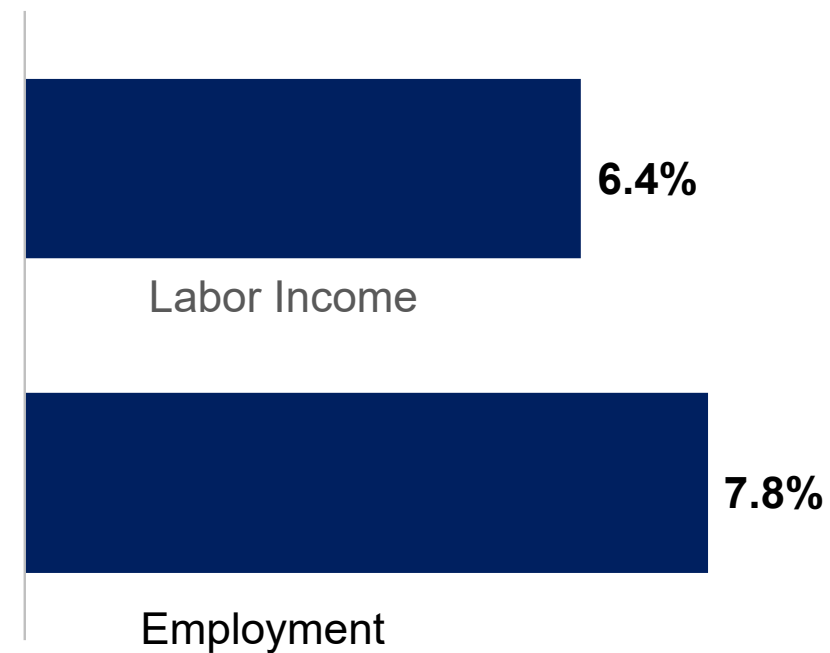
	2015	2016	2017	2018	2019	2020	2021	% relative to 2019
Bradford	1,408	1,378	1,395	1,434	1,469	1,280	1,404	95.6%
Lackawanna	5,117	5,056	5,182	5,294	5,439	4,113	4,638	85.3%
Luzerne	7,068	7,151	7,227	7,284	7,259	5,588	6,275	86.4%
Schuylkill	1,221	1,253	1,267	1,287	1,304	1,157	1,329	101.9%
Sullivan	167	172	175	183	183	165	189	103.0%
Susquehanna	1,096	1,116	1,129	1,172	1,202	987	1,177	97.9%
Wyoming	417	404	412	424	434	370	406	93.5%
Region Total	16,494	16,528	16,787	17,078	17,291	13,659	15,418	89.2%
% Change	-0.5%	0.2%	1.6%	1.7%	1.2%	-21.0%	12.9%	

Source: Tourism Economics

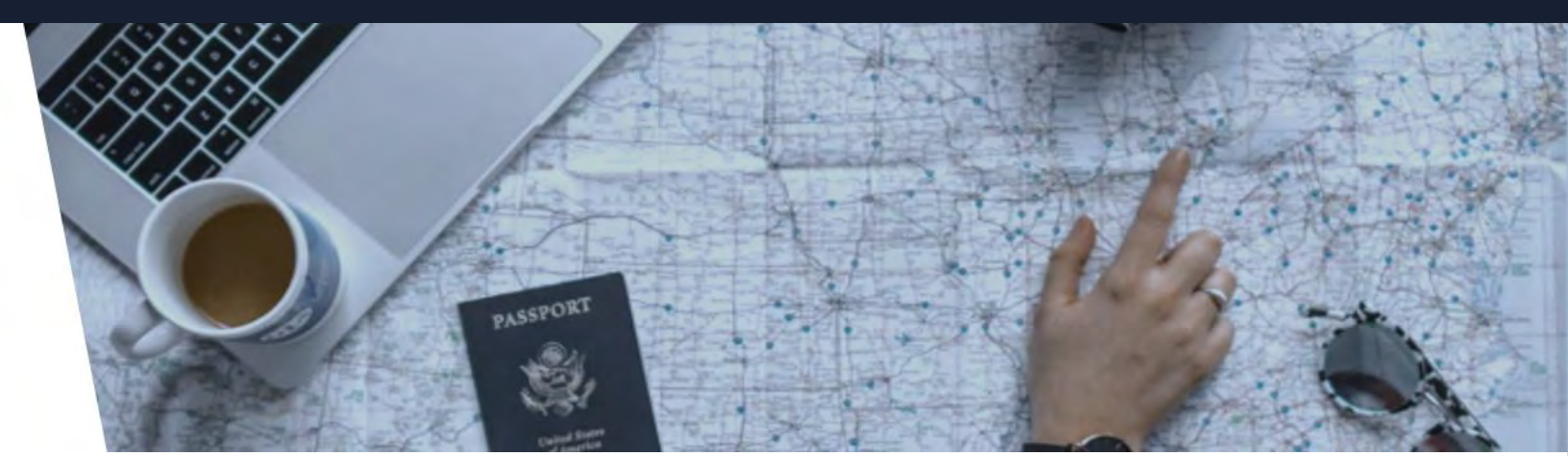
The nearly 15,420 employed in the region's travel- and tourism-related industry represented more than 1-in-13 jobs in the Upstate PA region in 2021.

Travel and Tourism Share of Regional Economy, 2021

Percent of region's total payroll employment and income



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



LEHIGH VALLEY VISITOR SPENDING

While visitor spending rose 29% in the Lehigh Valley region in 2021, it remained 11% below its 2019 pre-pandemic level.

Visitor Spending By Category, 2020 & 2021

Amounts in \$millions, % change 2020-2021

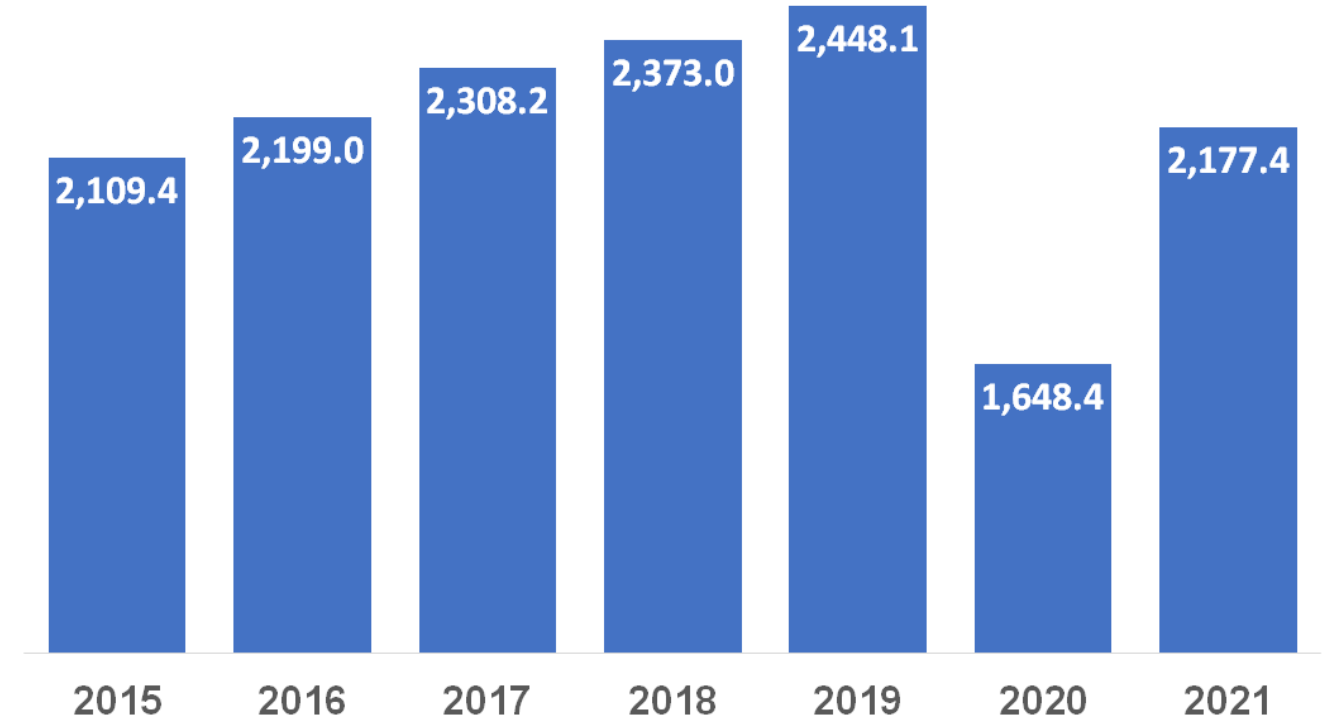
By County, 2021	Lodging	Food & beverages	Retail	Recreation	Transportation	Total
Lehigh	\$137.0	\$283.4	\$239.3	\$205.1	\$329.9	\$1,194.7
Northampton	\$84.7	\$180.1	\$125.2	\$337.4	\$195.3	\$922.7
Region Total	\$221.7	\$463.5	\$364.5	\$542.5	\$525.2	\$2,117.4
% Change	38.6%	17.4%	19.7%	29.1%	42.5%	28.5%
By County, 2020						
Lehigh	\$94.4	\$238.7	\$197.4	\$165.1	\$224.5	\$920.1
Northampton	\$65.6	\$156.3	\$107.2	\$255.2	\$144.0	\$728.2
Region Total	\$160.0	\$395.0	\$304.6	\$420.3	\$368.5	\$1,648.4

Lodging includes spending at/on second homes.
Transportation includes both ground and air transportation.

Source: STR, County room tax revenues, PA Department of Revenue, Tourism Economics

Lehigh Valley Visitor Spending, 2015-2021

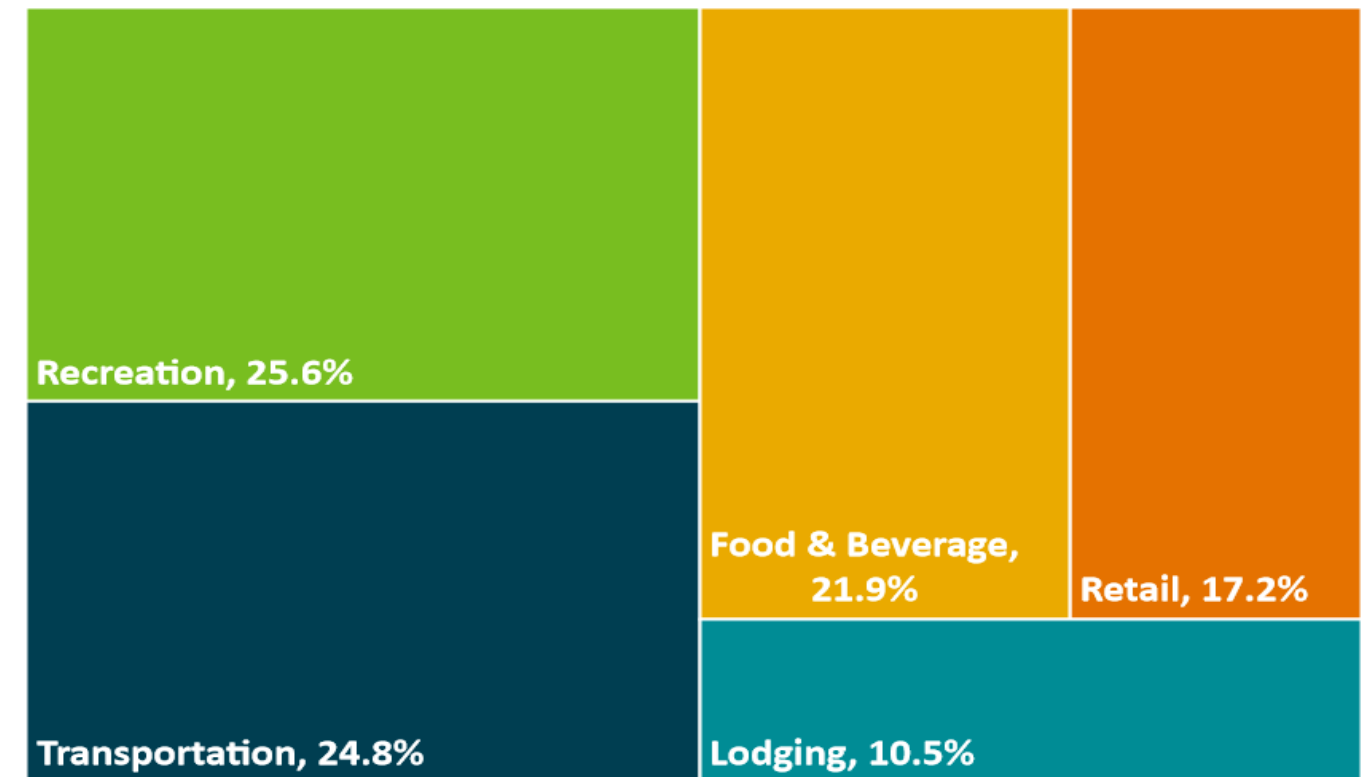
Amounts in \$millions



Source: Tourism Economics

Visitor Spending By Category, 2021

Percent of Total



Source: Tourism Economics

LEHIGH VALLEY ECONOMIC IMPACTS

Tourism Satellite Account - Demand Measures, 2020 & 2021

Amounts in \$millions, % change 2020-2021

By County, 2021	Visitor		Investment/ PCE	Total Tourism Demand
	Spending	Government		
Lehigh	\$1,194.7	\$5.0	\$66.8	\$1,266.6
Northampton	\$922.7	\$3.5	\$51.8	\$977.9
Region Total	\$2,117.4	\$8.5	\$118.6	\$2,244.5
% Change	28.5%	46.7%	1.8%	26.8%

By County, 2020				
Lehigh	\$920.1	\$3.3	\$65.0	\$988.4
Northampton	\$728.2	\$2.4	\$51.5	\$782.2
Region Total	\$1,648.4	\$5.8	\$116.5	\$1,770.6

Source: Tourism Economics

Travel & Tourism Industry (direct) Impacts, 2020 & 2021

Amounts in \$millions, except employment (in units), % change 2020-2021

By 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
Region Total	\$2,117.4	14,327	\$589.3	\$117.8	\$141.0
% Change	28.5%	11.9%	14.2%	14.5%	9.7%

By County, 2020					
Lehigh	\$920.1	6,715	\$247.6	\$53.8	\$65.1
Northampton	\$728.2	6,088	\$268.5	\$49.1	\$63.5
Region Total	\$1,648.4	12,803	\$516.1	\$102.8	\$128.5

Travel & Tourism Economy (total) Impacts, 2020 & 2021

Amounts in \$millions, except employment (in units), % change 2020-2021

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
Region Total	\$2,244.5	23,086	\$1,181.5	\$226.7	\$252.4
% Change	26.8%	9.9%	8.6%	13.1%	9.5%

By County, 2020					
Lehigh	\$988.4	11,069	\$506.0	\$104.4	\$116.9
Northampton	\$782.2	9,943	\$581.7	\$96.1	\$113.6
Region Total	\$1,770.6	21,012	\$1,087.7	\$200.4	\$230.5

Source: Tourism Economics

LEHIGH VALLEY VISITOR SPENDING & EMPLOYMENT TIMELINES

Employment directly supported by visitor spending rose 12%, or by more than 1,500 jobs in 2021, but remained 15% below its 2019 pre-pandemic level.

Visitor Spending & Travel Industry Employment Timelines, 2020 & 2021

Visitor spending in \$millions, employment in units, % 2021 relative to 2019

	2015	2016	2017	2018	2019	2020	2021	% relative to 2019
Lehigh	\$1,127.8	\$1,169.4	\$1,240.9	\$1,313.5	\$1,359.1	\$920.1	\$1,194.7	87.9%
Northampton	\$981.5	\$1,029.6	\$1,067.3	\$1,059.5	\$1,089.1	\$728.2	\$922.7	84.7%
Region Total	\$2,109.4	\$2,199.0	\$2,308.2	\$2,373.0	\$2,448.1	\$1,648.4	\$2,117.4	86.5%
% Change	6.7%	4.3%	5.0%	2.8%	3.2%	-32.7%	28.5%	

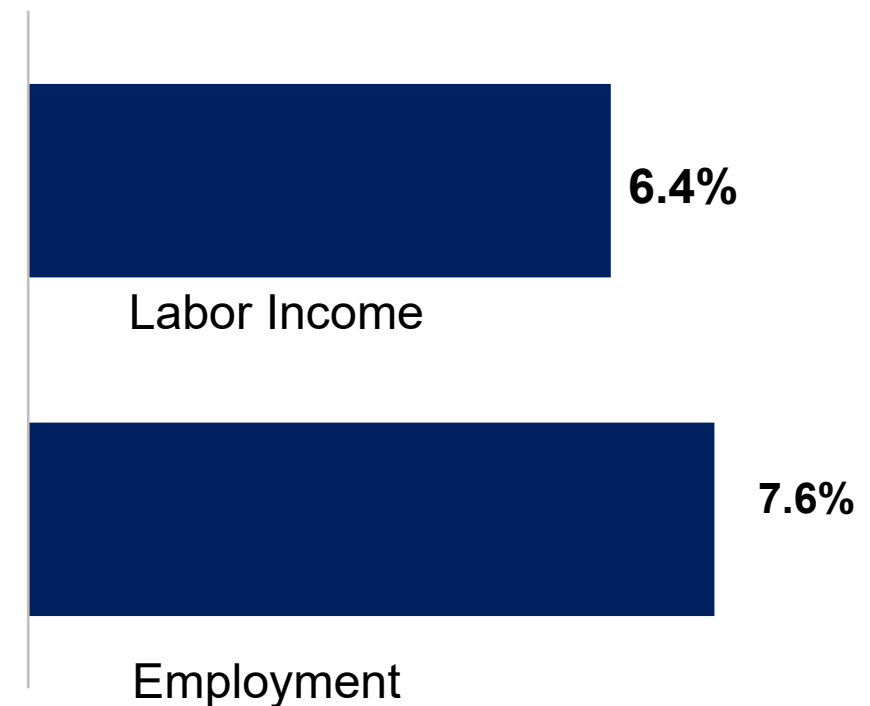
	2015	2016	2017	2018	2019	2020	2021	% relative to 2019
Lehigh	8,119	8,356	8,590	8,667	8,844	6,715	7,623	86.2%
Northampton	7,127	7,407	7,611	7,747	7,925	6,088	6,704	84.6%
Region Total	15,246	15,764	16,201	16,414	16,769	12,803	14,327	85.4%
% Change	2.3%	3.4%	2.8%	1.3%	2.2%	-23.7%	11.9%	

Source: Tourism Economics

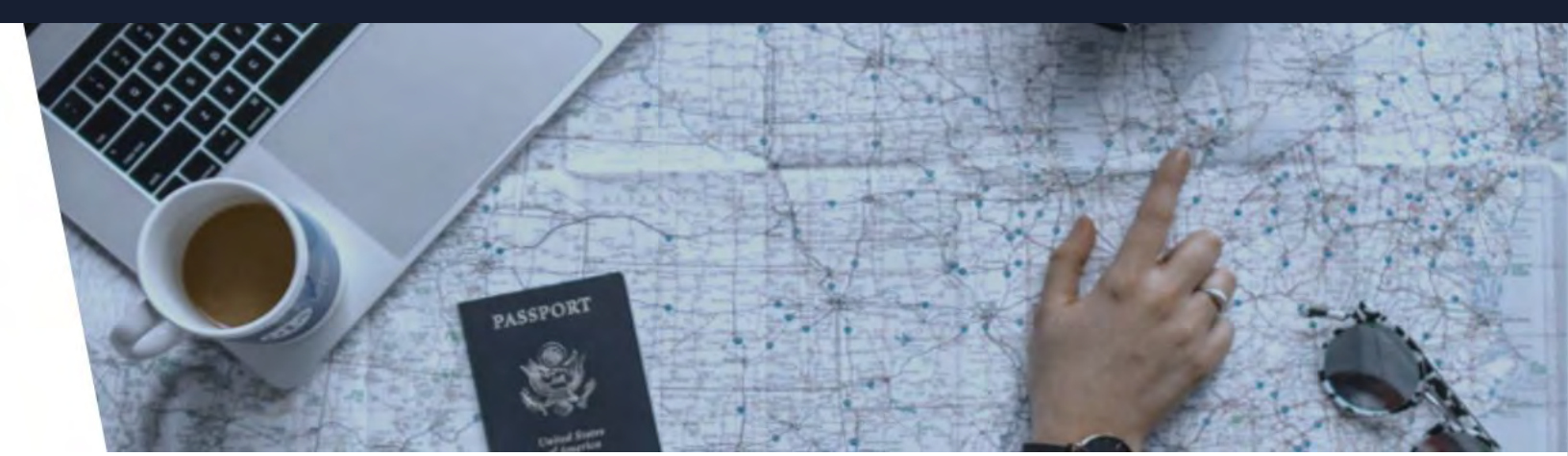
The nearly 14,330 employed in the region's travel- and tourism-related industry represented nearly 1-in-13 jobs in the Lehigh Valley region in 2021.

Travel and Tourism Share of Region's Economy

Percent of region's total payroll employment and labor income



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



PHILADELPHIA & THE COUNTRYSIDE VISITOR SPENDING

While visitor spending rose 36% in 2021 in the Philadelphia & The Countryside region, it remained 30% below its 2019 pre-pandemic level.

Visitor Spending By Category, 2020 & 2021

Amounts in \$ millions, 2021 % change

By 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
Region Total	\$1,268.6	\$1,514.1	\$987.9	\$638.8	\$3,211.5	\$7,620.8
% Change	38.7%	19.9%	20.3%	28.8%	50.7%	35.5%

By County, 2020	Lodging	Food & beverages	Retail	Recreation	Transportation	Total
Bucks	\$123.9	\$165.3	\$107.6	\$65.0	\$207.7	\$669.5
Chester	\$80.1	\$133.0	\$93.2	\$61.7	\$142.6	\$510.5
Delaware	\$91.6	\$135.9	\$89.5	\$53.9	\$173.7	\$544.6
Montgomery	\$181.0	\$193.2	\$129.2	\$65.0	\$279.3	\$847.8
Philadelphia	\$437.9	\$635.5	\$401.8	\$250.3	\$1,328.2	\$3,053.7
Region Total	\$914.5	\$1,262.9	\$821.2	\$496.0	\$2,131.5	\$5,626.1

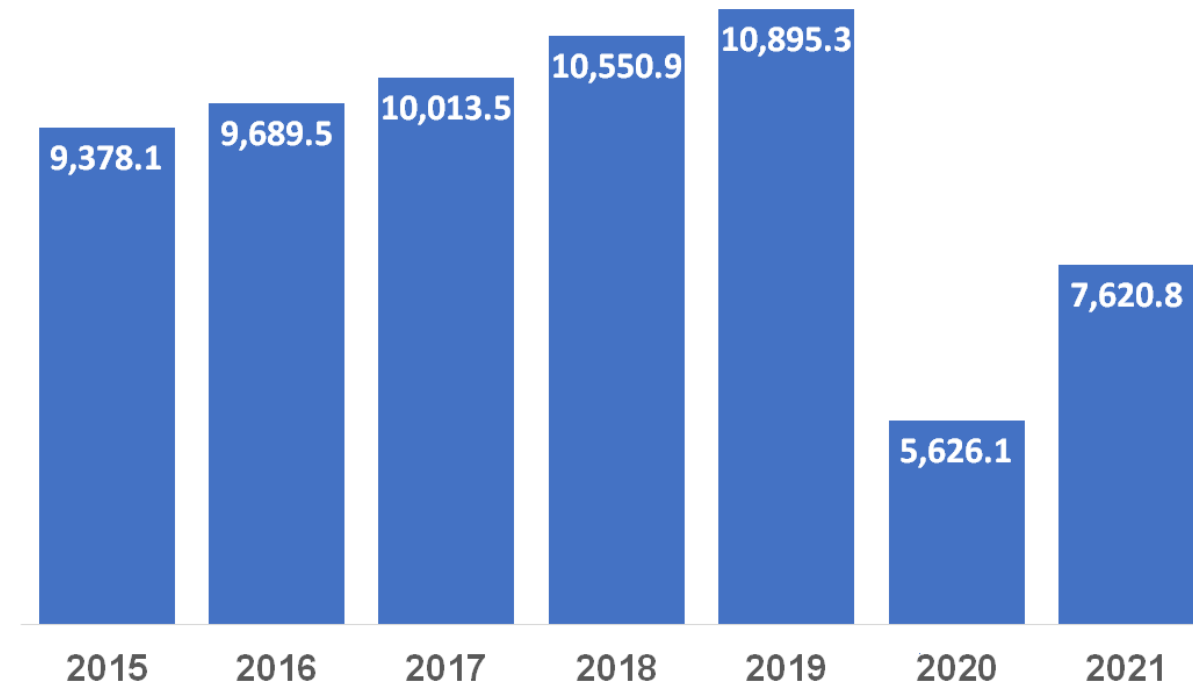
Lodging includes spending at/on second homes.

Transportation includes both ground and air transportation.

Sources: STR, County room tax revenues, PA Department of Revenue, Tourism Economics

Philadelphia & The Countryside Visitor Spending, 2015-2021

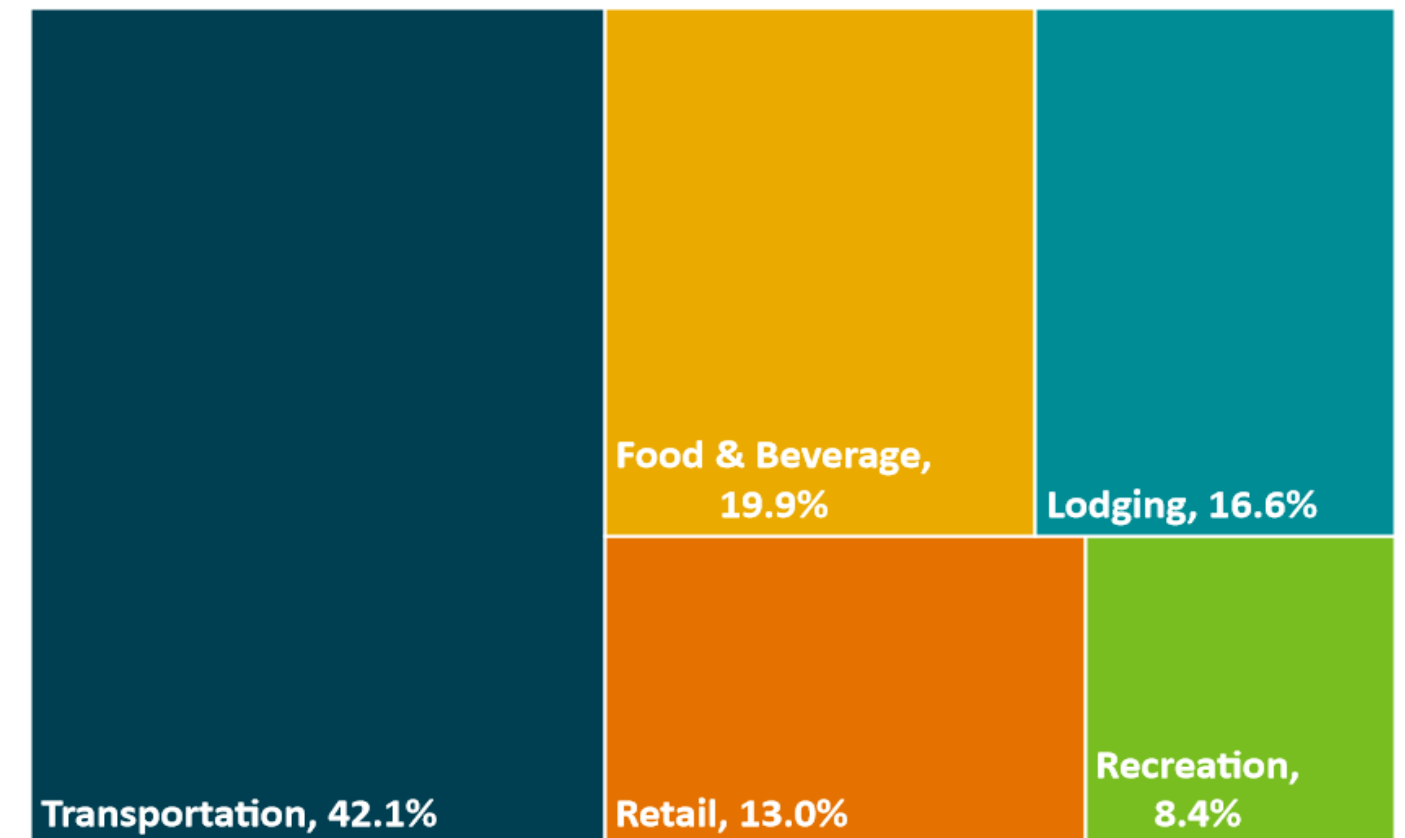
Amounts in \$millions



Source: Tourism Economics

Visitor Spending By Category, 2021

Percent of total



Source: Tourism Economics

PHILADELPHIA & THE COUNTRYSIDE ECONOMIC IMPACTS

Tourism Satellite Account - Demand Measures, 2020 & 2021

Amounts in \$millions, % change 2020-2021

By County, 2021	Visitor		Investment/ PCE	Total Tourism Demand
	Spending	Government		
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
Region Total	\$7,620.8	\$67.3	\$427.3	\$8,115.4
% Change	35.5%	46.8%	7.3%	33.7%

By County, 2020				
Bucks	\$669.5	\$4.8	\$47.4	\$721.8
Chester	\$510.5	\$2.9	\$36.2	\$549.6
Delaware	\$544.6	\$2.6	\$38.5	\$585.7
Montgomery	\$847.8	\$5.2	\$60.0	\$912.9
Philadelphia	\$3,053.7	\$30.4	\$215.9	\$3,300.1
Region Total	\$5,626.1	\$45.9	\$398.1	\$6,070.1

Source: Tourism Economics

Travel & Tourism Industry (direct) Impacts, 2020 & 2021

Amounts in \$millions, except employment (in units), % change 2020-2021

By County, 2021	Visitor Spend	Employment	Labor Income	Taxes	
				State/Local	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
Region Total	\$7,620.8	62,216	\$3,026.1	\$537.4	\$652.5
% Change	35.5%	11.7%	15.4%	17.6%	12.4%

By County, 2020					
Bucks	\$669.5	7,450	\$266.8	\$49.5	\$61.7
Chester	\$510.5	5,854	\$220.4	\$38.6	\$49.8
Delaware	\$544.6	6,163	\$265.8	\$43.5	\$58.2
Montgomery	\$847.8	10,737	\$417.1	\$69.2	\$91.2
Philadelphia	\$3,053.7	25,479	\$1,451.5	\$256.3	\$319.9
Region Total	\$5,626.1	55,683	\$2,621.6	\$457.0	\$580.7

Travel & Tourism Economy (total) Impacts, 2020 & 2021

Amounts in \$millions, except employment (in units), % change 2020-2021

By County, 2021	Visitor		Labor Income	Taxes	
	Spend	Employment		State/Local	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
Region Total	\$8,115.4	110,691	\$6,208.2	\$1,008.6	\$1,164.6
% Change	33.7%	9.6%	11.6%	15.6%	12.3%

By County, 2020					
Bucks	\$721.8	13,734	\$543.4	\$94.6	\$110.3
Chester	\$549.6	10,928	\$456.3	\$74.6	\$89.0
Delaware	\$585.7	11,440	\$524.5	\$84.9	\$103.9
Montgomery	\$912.9	19,625	\$881.7	\$133.9	\$162.7
Philadelphia	\$3,300.1	45,296	\$3,159.3	\$484.6	\$571.2
Region Total	\$6,070.1	101,023	\$5,565.2	\$872.6	\$1,037.0

Source: Tourism Economics

PHILADELPHIA & THE COUNTRYSIDE VISITOR SPENDING & EMPLOYMENT TIMELINES

Employment directly supported by visitor spending rose 12%, or by more than 6,500 jobs in 2021, but remained 21% below its 2019 pre-pandemic level.

Visitor Spending & Travel Industry Employment Timelines, 2020 & 2021

Visitor spending in \$millions, employment in units, % 2021 relative to 2019

	2015	2016	2017	2018	2019	2020	2021	% relative to 2019
Bucks	\$795.5	\$813.9	\$831.7	\$877.2	\$913.8	\$669.5	\$842.1	92.2%
Chester	\$760.1	\$772.6	\$800.2	\$847.2	\$865.2	\$510.5	\$650.2	75.2%
Delaware	\$658.6	\$667.9	\$692.4	\$747.7	\$770.0	\$544.6	\$715.0	92.9%
Montgomery	\$1,327.0	\$1,360.8	\$1,390.3	\$1,420.3	\$1,447.5	\$847.8	\$1,137.0	78.6%
Philadelphia	\$5,836.8	\$6,074.3	\$6,298.9	\$6,658.5	\$6,898.8	\$3,053.7	\$4,276.4	62.0%
Region Total	\$9,378.1	\$9,689.5	\$10,013.5	\$10,550.9	\$10,895.3	\$5,626.1	\$7,620.8	69.9%
% Change	2.8%	3.3%	3.3%	5.4%	3.3%	-48.4%	35.5%	

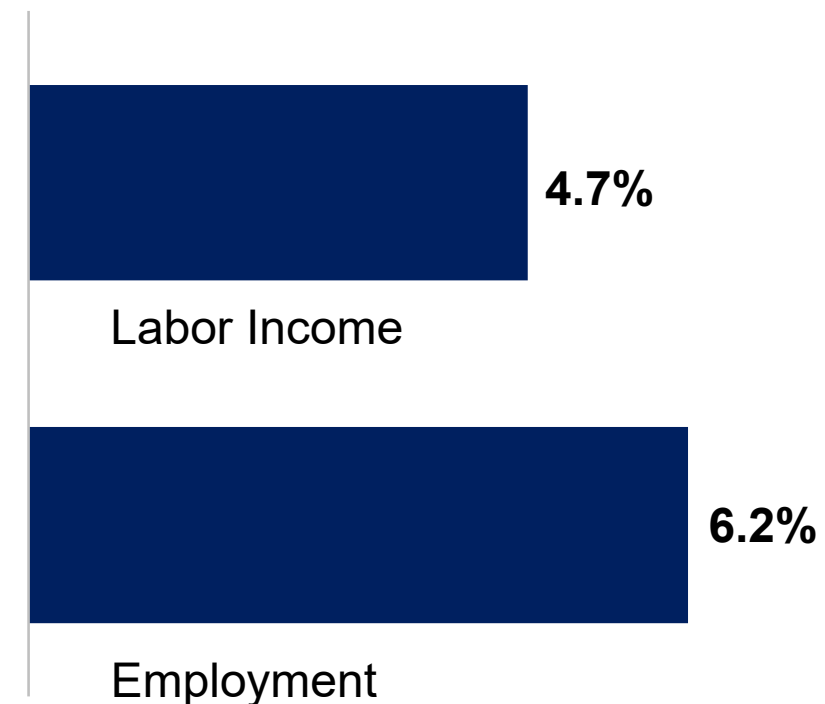
	2015	2016	2017	2018	2019	2020	2021	% relative to 2019
Bucks	8,999	9,161	9,235	9,418	9,614	7,450	8,426	87.6%
Chester	7,397	7,499	7,679	7,845	8,015	5,854	6,557	81.8%
Delaware	7,535	7,696	7,850	8,006	8,149	6,163	6,857	84.2%
Montgomery	13,618	13,965	14,147	14,318	14,636	10,737	12,097	82.7%
Philadelphia	35,577	36,361	37,046	37,953	38,748	25,479	28,278	73.0%
Region Total	73,127	74,683	75,958	77,540	79,162	55,683	62,216	78.6%
% Change	1.8%	2.1%	1.7%	2.1%	2.1%	-29.7%	11.7%	

Source: Tourism Economics

The more than 62,200 employed in the region's travel- and tourism-related industry represented 1-in-16 jobs in the Philadelphia and The Countryside region in 2021.

Travel & Tourism Share of Region's Economy, 2020 & 2021

Percent of region's total payroll employment and income



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

Glossary – Spending Definitions

Term	Description
Lodging	Includes visitor spending in the accommodation sub-sector. This includes food and other services provided by hotels, rentals and similar establishments.
Food and beverage	Includes all visitor spending on food & beverages, including at restaurants, bars, grocery stores and other food providers.
Recreation	Includes visitor spending within the arts, entertainment and recreation sub-sector.
Shopping	Includes visitor spending in all retail sub-sectors within the local economy.
Local transport	Includes visitor spending on local transport services such as taxis, limos, trains, rental cars, buses, and the local share of air transportation spending.
Service stations	Visitor spending on gasoline.
Second homes	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
Direct Impact	Impacts (business sales, jobs, income, and taxes) created directly from spending by visitors to a destination within a discreet group of tourism-related sectors (e.g. recreation, transportation, lodging).
Indirect Impact	Impacts created from purchase of goods and services used as inputs (e.g. food wholesalers, utilities, business services) into production by the directly affected tourism-related sectors (i.e. economic effects stemming from business-to-business purchases in the supply chain).
Induced Impact	Impacts created from spending in the local economy by employees whose wages are generated either directly or indirectly by visitor spending.
Employment	Jobs directly and indirectly supported by visitor activity (includes part-time and seasonal work). One job is defined as one person working at least one hour per week for fifty weeks during the calendar year.
Labor income	Income (wages, salaries, proprietor income and benefits) supported by visitor spending.
Value Added (GDP)	The economic enhancement a company gives its products or services before offering them to customers.
Local Taxes	City and County taxes generated by visitor spending. This includes any local sales, income, bed, usage fees, licenses and other revenues streams of local governmental authorities – from transportation to sanitation to general government.
State Taxes	State tax revenues generated by visitor spending. This will include sales, income, corporate, usage fees and other assessments of state governments.

ABOUT TOURISM ECONOMICS

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

- Global travel data-sets with the broadest set of country, 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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