

2023

Economic Impact of Visitors in Pennsylvania

Conducted by:



Prepared for:
Pennsylvania
Office of Tourism



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Introduction

The travel sector is an integral part of Pennsylvania's economy. Visitors generate significant economic benefits to households, businesses, and government, and will be a critical driver of the Commonwealth's future. In 2023, tourism-supported jobs accounted for 6.2% of all jobs in Pennsylvania and a total \$80.7 billion in total business sales.

By monitoring the visitor economy, policymakers can inform decisions regarding the funding and prioritization of the sector's development. They can also carefully monitor its successes and future needs. This is especially true as Pennsylvania's tourism industry rebounds post-pandemic and transitions to expansion. 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.

An IMPLAN input-output model was constructed for Pennsylvania. The model traces the flow of visitor-related expenditures through the city'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 by sector.

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 the ES202 data.

The analysis draws on the following data sources:

- Longwoods International: Survey data, including spending and visitor totals for domestic visitor to Pennsylvania
- Bureau of Economic Analysis and Bureau of Labor Statistics: Employment and wage data, by industry
- STR: Lodging performance data, including room demand, room rates, occupancy, and room revenue, for hotels
- PA DCED: Sales tax data by category for Pennsylvania
- U.S. Census Bureau: 2017 Economic Census data, in addition to population, household, second homes and median real estate tax data
- Tourism Economics: International travel data for overseas, Canadian, and Mexican travel to Pennsylvania based on aviation, survey, and credit card information
- U.S. Energy Information Administration: gasoline prices for Mid-Atlantic region
- U.S. Bureau of Transportation: Passenger data for airports in Pennsylvania

KEY FINDINGS



Key Findings

The Visitor Economy Drives Economic Impact

In 2023, nearly 197 million visitors spent \$47.9 billion across Pennsylvania. Visitor spending increased 5.5% versus the prior year to a new high-water mark as a result of both price and demand increases.



196.6M

Visitors to Pennsylvania



\$47.9B

Visitor Spending



\$80.8B

Total Business Sales

Total Economic Impacts of Visitors in Pennsylvania (2023)

The visitor spending impact of \$47.9 billion generated a total economic impact of \$25.4 billion in Pennsylvania in 2023 including indirect and induced impacts. This total economic impact sustained 507,594 jobs and generated \$4.8 billion in state and local tax revenues.



\$25.4B

Total Labor Income



507,594

Total Jobs Supported



\$4.8B

State and Local Taxes

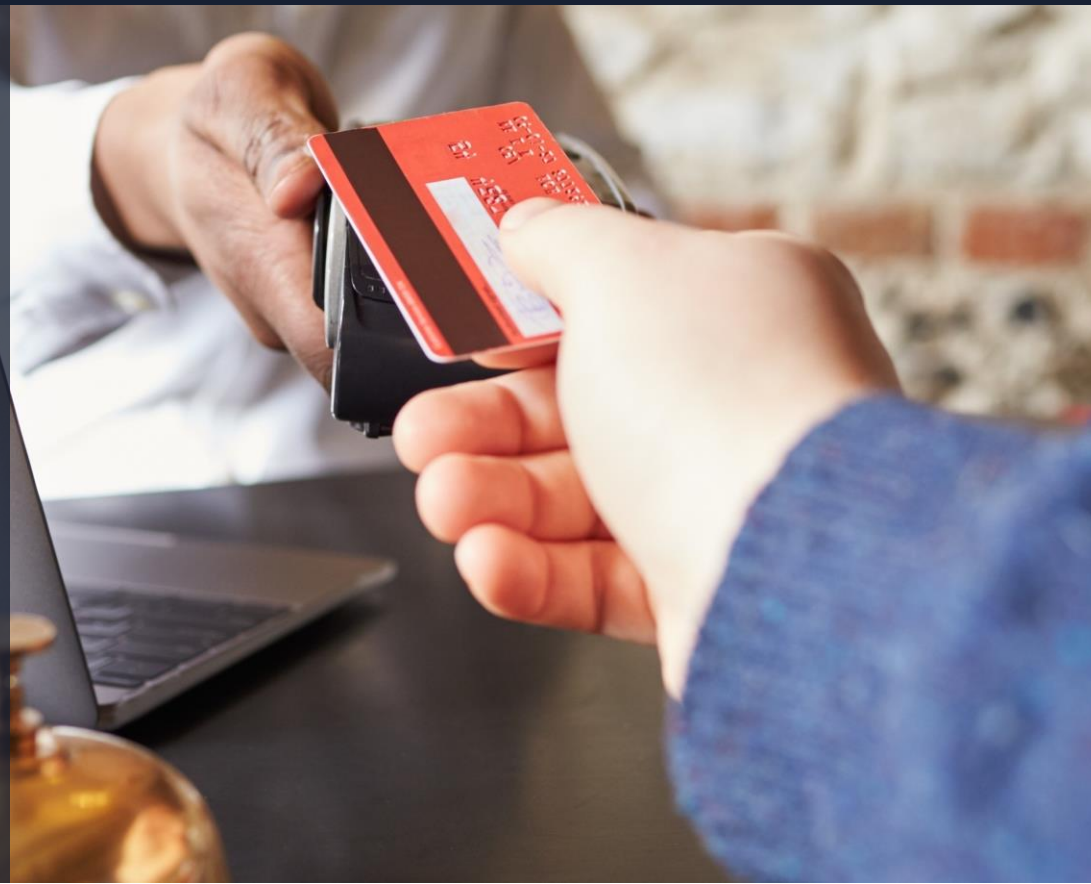


Tourism's economic impact in Pennsylvania totaled **\$80.8 billion** in 2023.

VISITOR SPENDING



Visitors to Pennsylvania spent **\$47.9 billion** in 2023.



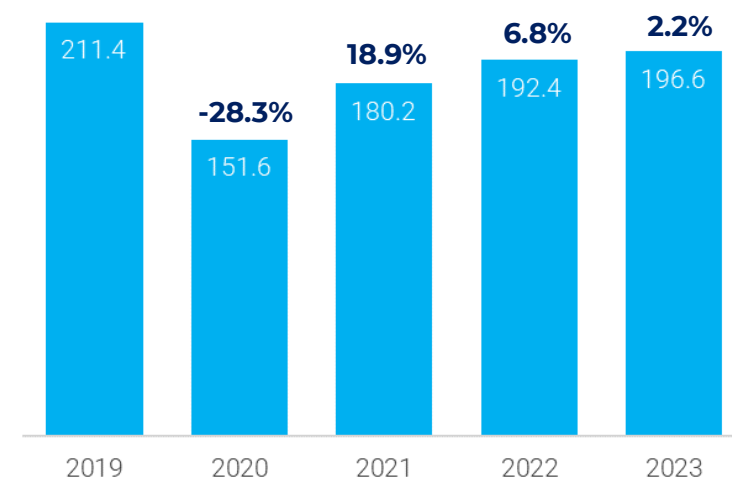
Visitor Volume and Spending

Visitor Volume

Visitor volumes reached nearly 197 million visitors in 2023, an increase of 4.2 million visits. Day and overnight visitor growth grew 2.1% and 2.4%, respectively. Visitor volumes remained below pre-pandemic levels.

Pennsylvania Visitor Volume

Amounts in millions of visitors



Source: Longwoods International, Tourism Economics



Source: Tourism Economics

Visitor Spending

Visitors to Pennsylvania spent **\$47.9 billion** across various sectors in 2023.

Visitor spending on transportation, including local and air transportation grew to \$14.4 billion in 2023, 30% of the total. Spending on food and beverage reached \$10.5 billion, 22% of total visitor spending.

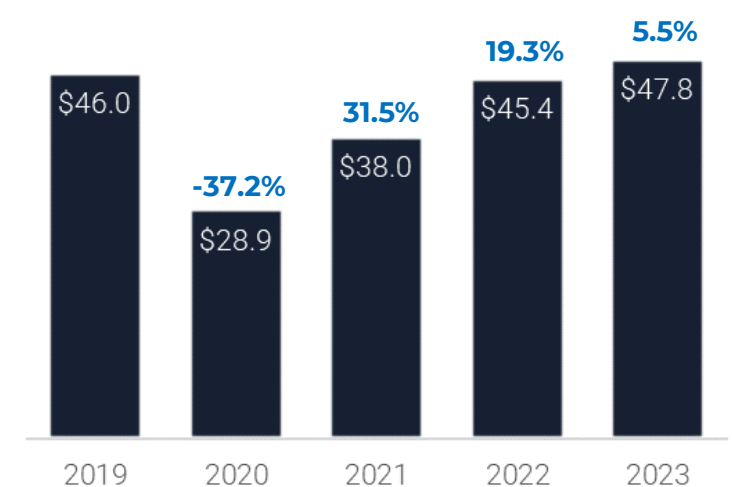
Spending on recreation tallied \$9.1 billion, 19% of total visitor spending.

Retail spending accounted for 15% of total spending, or \$7.4 billion.

Spending on Lodging, including short-term rental and second homes, reached \$6.5 billion, or 13% of total visitor spending.

Pennsylvania Visitor Spending

Amounts in \$ billions



Source: Tourism Economics

Note: Lodging spending is calculated as an industry and includes the value of short-term rentals and second homes. Transportation includes both air and local transportation.

Visitor Spending and Volume Trends

Visitor spending increased 5.4% in 2023 to \$47.9 billion. Solid growth was witnessed across all sectors, driven by increases in demand and the prices of key commodities.

By category, recreation spending led growth in 2023, increasing 10.5% year-over-year, as visitors shifted preferences to experiential spending. This was followed by spending growth in food and beverage, which increased 6.8% in 2023. Lodging spending, including short-term rental and second homes spending expanded 5.1%. Retail and transportation spending saw more modest increases, growing 3.5% and 2.9%, respectively.

Total visitor spending surpassed pre-pandemic levels for the first time in 2023.

Meanwhile, visitor volumes in Pennsylvania reached 196.6 million, as overnight visitors totaled 69.5 million. These visitors spent \$29.2 billion in 2023, representing 61.2% of overall visitor spending.

International visitor spending increased to 3.9% of visitor spending; up from 2.8% in 2022 as this market continues to recover.

Pennsylvania Visitor Spending

Amounts in \$ millions, 2023 percent % change, and percent % relative to 2019

	2019	2020	2021	2022	2023	2023 Growth	% relative to 2019
Total visitor spending	\$46,041	\$28,909	\$38,017	\$45,351	\$47,860	5.5%	103.9%
Lodging*	\$6,445	\$3,416	\$4,869	\$6,140	\$6,451	5.1%	100.1%
Food & beverage	\$9,860	\$6,931	\$8,335	\$9,839	\$10,511	6.8%	106.6%
Retail	\$7,042	\$5,352	\$6,495	\$7,105	\$7,355	3.5%	104.4%
Recreation	\$8,050	\$4,921	\$6,526	\$8,253	\$9,117	10.5%	113.3%
Transportation**	\$14,643	\$8,289	\$11,792	\$14,014	\$14,425	2.9%	98.5%

Source: Tourism Economics

* Lodging includes and the value of second homes

** Transportation includes both ground and air transportation

Pennsylvania Visitor Volume and Spending by Segment

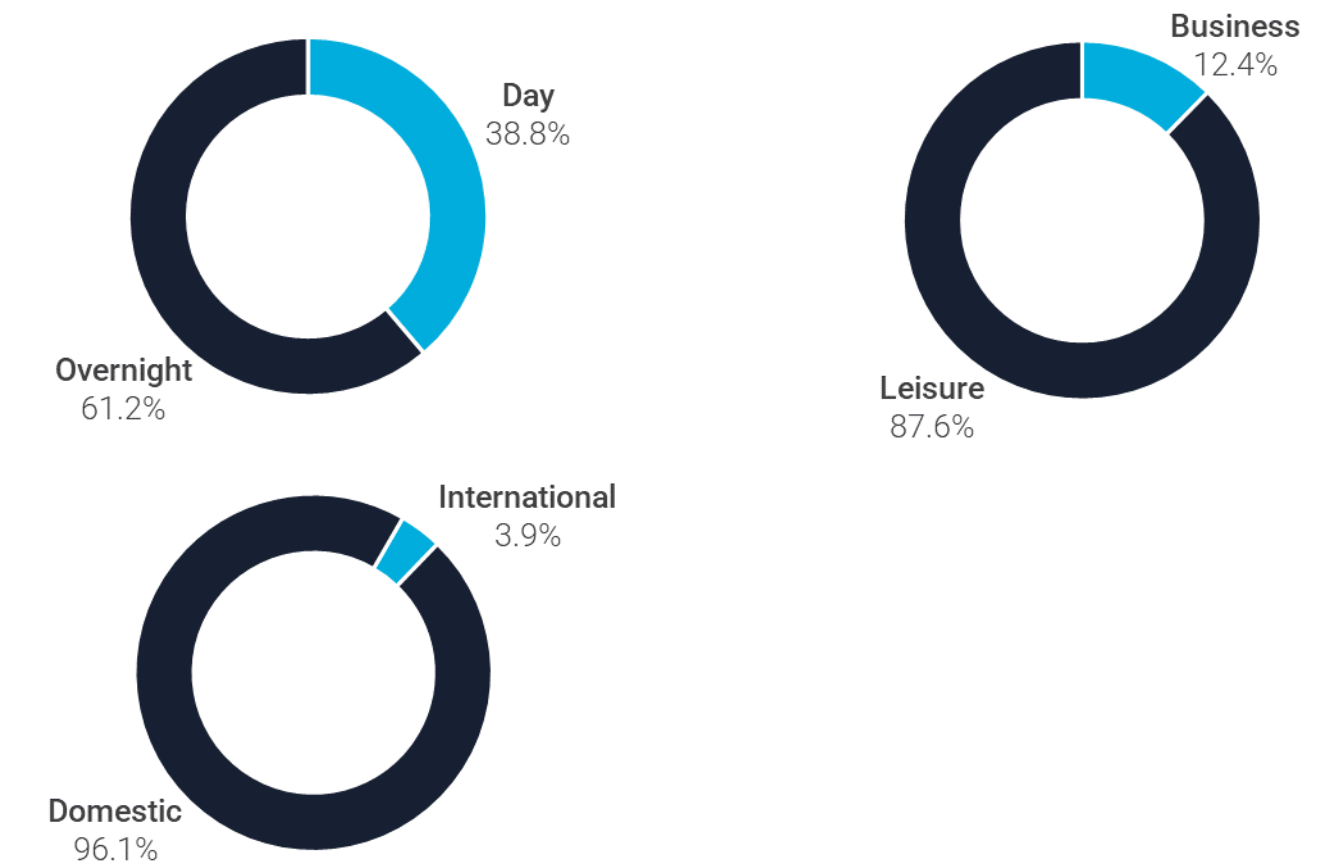
Visitor volumes and spending in millions, 2023 percent % change, and % relative to 2019

	2019	2020	2021	2022	2023	2023 Growth	% relative to 2019
Total visitors	211.4	151.6	180.2	192.4	196.6	2.2%	93.0%
Day	136.5	107.5	120.0	124.5	127.1	2.1%	93.1%
Overnight	74.9	44.1	60.1	67.9	69.5	2.4%	92.8%
Total visitor spending	\$46,041	\$28,909	\$38,017	\$45,351	\$47,860	5.5%	103.9%
Day	\$16,722	\$13,163	\$14,812	\$17,343	\$18,580	7.1%	111.1%
Overnight	\$29,319	\$15,746	\$23,205	\$28,008	\$29,280	4.5%	99.9%
Per visitor spending	\$218	\$191	\$211	\$236	\$243	3.3%	111.8%
Day	\$123	\$123	\$123	\$139	\$146	5.0%	119.3%
Overnight	\$391	\$357	\$386	\$413	\$421	2.1%	107.6%

Source: Longwoods International, Tourism Economics

Pennsylvania spending share by segment

Percent % of visitor spending by market



Source: Longwoods International, 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, visitor economy spending in 2023 surpassed \$50 billion, led by domestic traveler spending at \$47.9 billion. Capital investment in support of tourism surpassed \$2.0 billion in 2023, an increase of 2.6%.

Tourism Capital Investment

Amounts in \$ millions

	2019	2020	2021	2022	2023	2023 Growth	% relative to 2019
Total Tourism CAPEX	\$2,366	\$1,710	\$1,808	\$1,965	\$2,017	2.6%	85.3%
Machinery & equip.	\$1,086	\$698	\$916	\$1,112	\$1,174	5.5%	108.0%
Construction	\$1,279	\$1,013	\$892	\$853	\$844	-1.1%	65.9%

Sources: Oxford Economics, Tourism Economics

VISITOR ECONOMY DISTRIBUTION

In Pennsylvania, the international visitor markets increased its share to 3.7% of tourism demand in 2023. While being a larger share than 2022, international visitor spending remains below of the over 6.0% share pre-pandemic.

Capital investment in tourism-related construction and machinery & equipment represented 4.0% of all tourism-related demand.

Domestic visitor markets remain the largest category, providing 91.2% of demand in 2023.

The governmental support share was 0.6% of all the Pennsylvania visitor economy in 2023.

Pennsylvania Visitor Economy

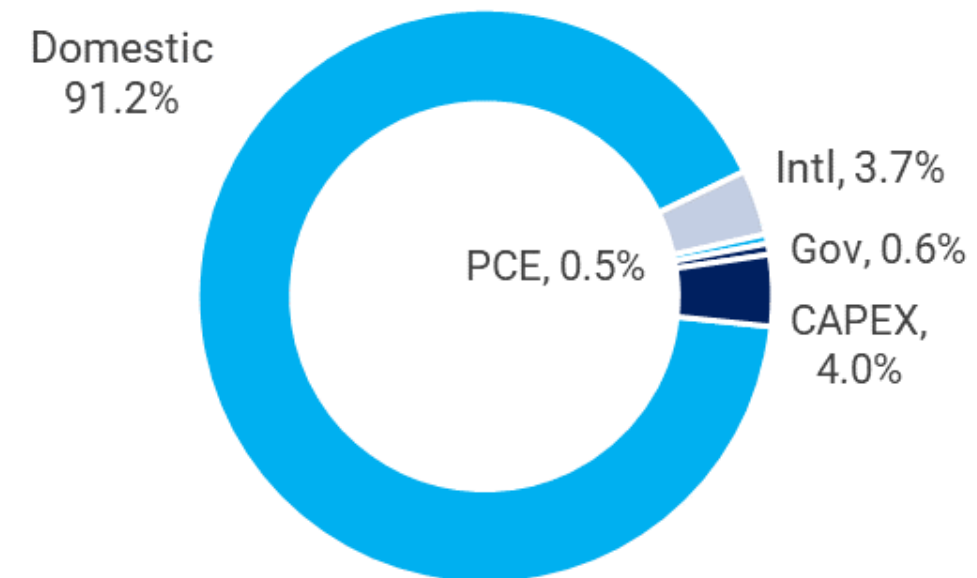
Amounts in \$ millions, 2023 % change, and % relative to 2019

	2019	2020	2021	2022	2023	2023 Growth	% relative to 2019
Tourism Demand	\$48,973	\$30,960	\$40,276	\$47,862	\$50,453	5.4%	103.0%
Domestic Visitor	\$43,161	\$28,389	\$37,478	\$44,075	\$46,006	4.4%	106.6%
International Visitor	\$2,880	\$520	\$539	\$1,276	\$1,854	45.3%	64.4%
Non-visitor PCE	\$299	\$193	\$225	\$252	\$269	6.9%	90.0%
Governmental Support	\$267	\$147	\$225	\$294	\$307	4.3%	114.8%
Capital Investment	\$2,366	\$1,710	\$1,808	\$1,965	\$2,017	2.6%	85.3%

Sources: Oxford Economics, Tourism Economics

Pennsylvania Visitor Economy

Percent distribution



Sources: Oxford Economics, Tourism Economics

ECONOMIC IMPACT METHODOLOGY



Economic Impact Methodology

Our analysis of the Pennsylvania visitor economy begins with direct visitor spending and 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.

IMPLAN remains a nationally recognized and widely used modeling tool, the leading provider of economic impact data and analytics software. The model traces the full extent of industry impacts as dollars flow through the local economy.

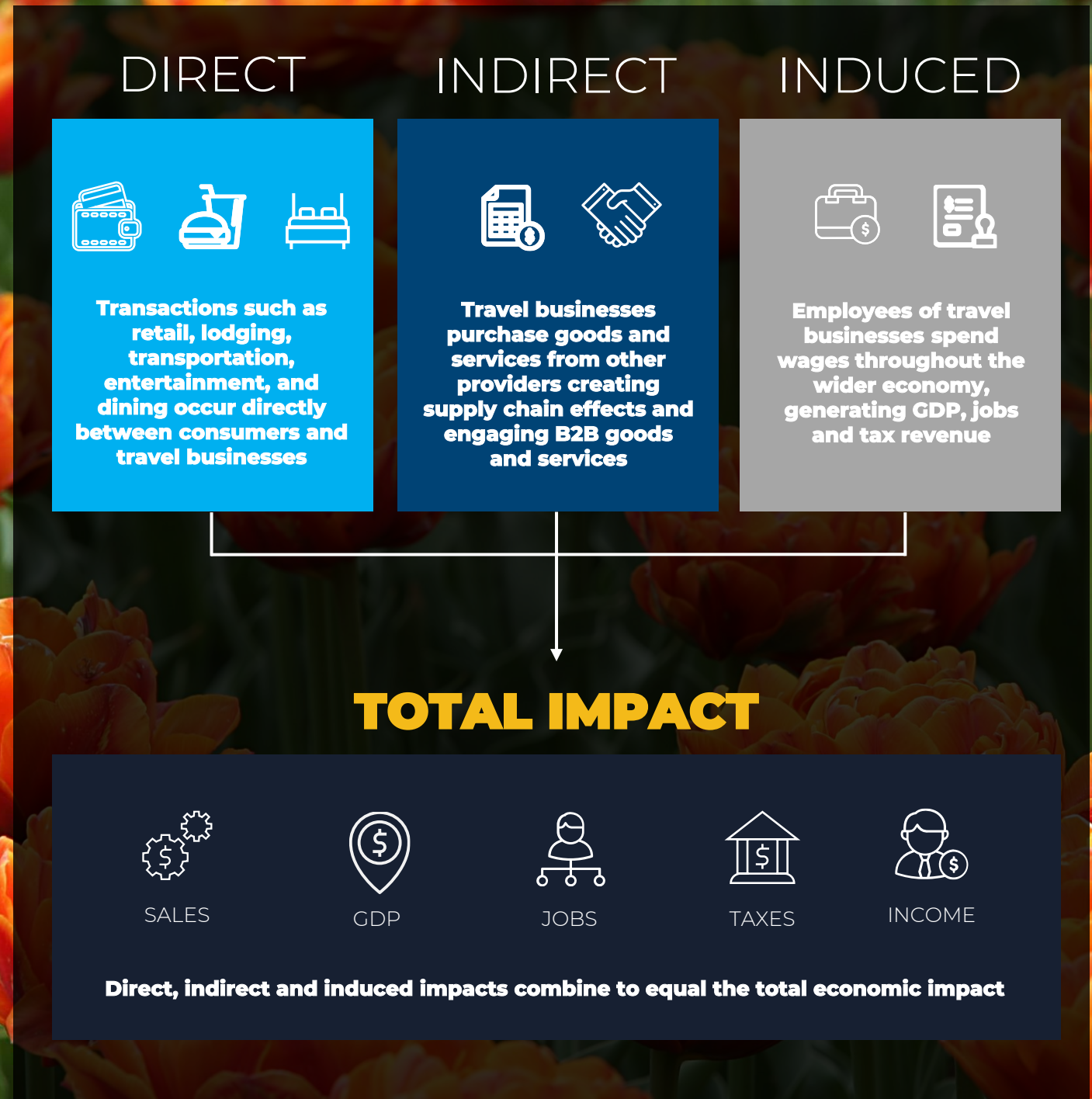
I-O models represent a profile of an economy by measuring the relationships among industries and consumers, quantifying three levels of impact:

- 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
- GDP
- Wages
- Employment
- Federal Taxes
- State Taxes
- Local Taxes

Economic Impact Framework



ECONOMIC IMPACT



Direct Employment

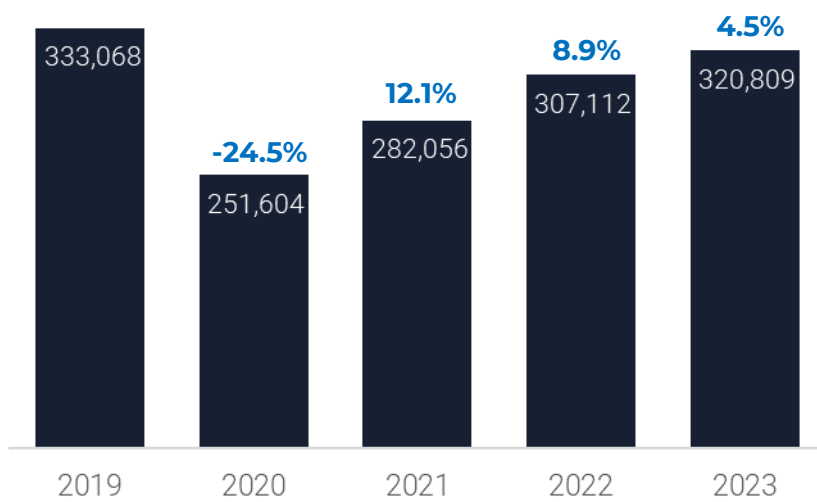
Employment supported by visitor activity increased 4.5% in 2023, recovering to 320,809 jobs. With the increase, the number of jobs directly supported by visitors remained 12,259 jobs below pre-pandemic levels.

Recovery in visitor-supported jobs has been slower than spending, with visitor-supported employment at 96% of pre-pandemic levels compared to spending at 104% of 2019 spending levels.

Compared to other industries, employment directly supported by tourism ranks 13th in the Commonwealth.

Visitor Supported Employment in Pennsylvania

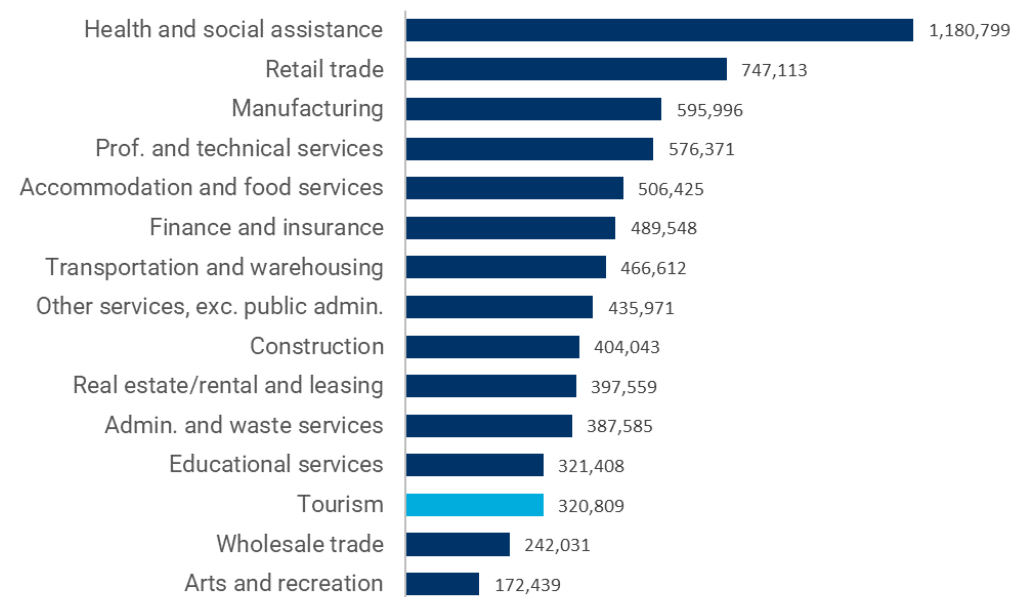
Amounts in number of jobs, direct only



Source: Tourism Economics

Employment in Pennsylvania, by major industry

Amounts in number of jobs



Sources: BEA, BLS, Tourism Economics

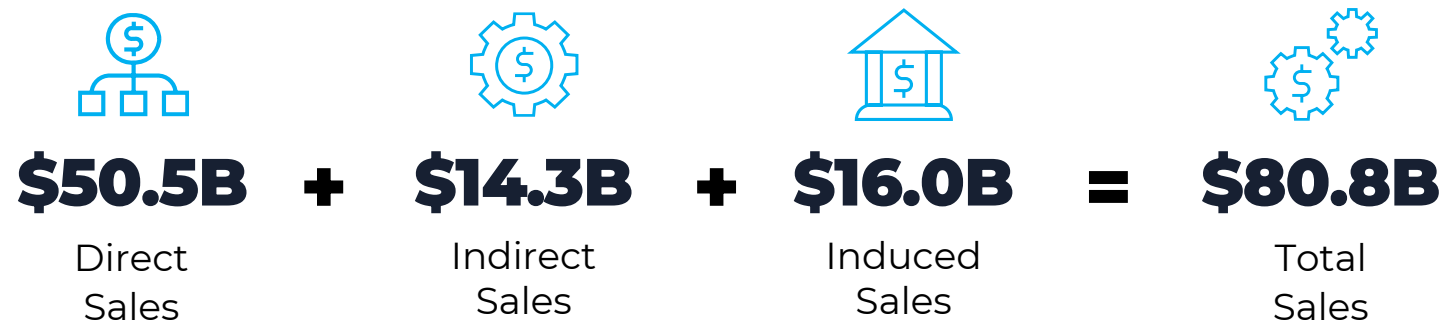


The tourism industry in **Pennsylvania** directly supported **320,809 local jobs.**

Visitor Economy Business Sales Impacts

The visitor economy - including visitor spending, as well as government support and capital investment for tourism - contributed a direct impact of \$50.5 billion in 2023. This direct impact generated \$30.3 billion in indirect and induced impacts, resulting in a total economic impact of \$80.8 billion in Pennsylvania's economy. The total economic impact shows the benefits to the broader economy across industries at the indirect and induced levels.

Summary of Business Sales Economic Impacts



Business Sales Impacts by Industry (2023)

Amounts in \$ millions

	Direct Business Sales	Indirect Business Sales	Induced Business Sales	Total Business Sales
Total, all industries	\$50,453	\$14,325	\$15,990	\$80,767
Food & Beverage	\$10,511	\$545	\$1,051	\$12,106
Finance, Insurance and Real Estate	\$3,798	\$3,453	\$4,637	\$11,887
Retail Trade	\$7,490	\$264	\$1,220	\$8,975
Recreation and Entertainment	\$8,327	\$366	\$218	\$8,911
Gasoline Stations	\$5,773	\$29	\$97	\$5,899
Lodging	\$5,604	\$6	\$32	\$5,642
Business Services	\$265	\$3,744	\$1,517	\$5,526
Other Transport	\$3,960	\$1,048	\$427	\$5,434
Construction and Utilities	\$2,017	\$983	\$476	\$3,476
Education and Health Care		\$68	\$3,065	\$3,133
Communications		\$1,176	\$799	\$1,975
Personal Services	\$525	\$444	\$849	\$1,817
Air Transport	\$1,597	\$47	\$81	\$1,725
Manufacturing	\$134	\$971	\$505	\$1,611
Wholesale Trade		\$718	\$716	\$1,434
Government	\$452	\$304	\$210	\$965
Agriculture, Fishing, Mining		\$160	\$90	\$250

Source: Tourism Economics

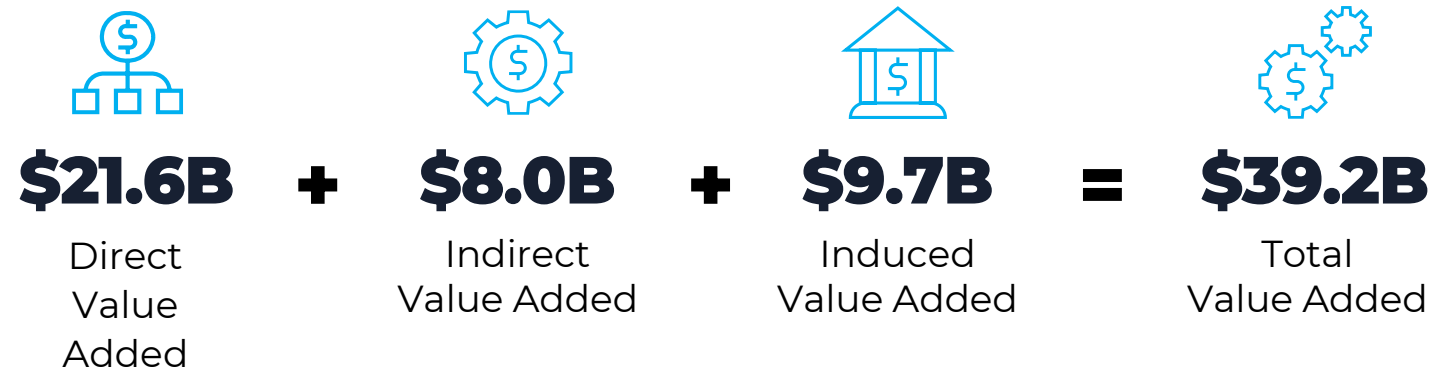
The total economic impact of **\$80.8 billion** accrued to industries across the economy.



Value Added Impacts

The value of all visitor-supported goods & services produced in Pennsylvania in 2023 for Pennsylvania visitors was \$39.2 billion, 4.0% of Pennsylvania's GDP.

Summary of Value Added Economic Impacts



Value Added Impacts by Industry (2023)

Amounts in millions

	Direct GDP	Indirect GDP	Induced GDP	Total GDP
Total, all industries	\$21,562	\$7,960	\$9,677	\$39,199
Finance, Insurance and Real Estate	\$1,517	\$1,711	\$2,889	\$6,116
Food & Beverage	\$4,420	\$359	\$556	\$5,334
Recreation and Entertainment	\$3,560	\$185	\$117	\$3,862
Lodging	\$3,696	\$4	\$21	\$3,721
Business Services	\$108	\$2,442	\$962	\$3,511
Retail Trade	\$2,153	\$151	\$904	\$3,208
Other Transport	\$2,385	\$485	\$208	\$3,077
Education and Health Care		\$41	\$1,872	\$1,913
Construction and Utilities	\$1,008	\$502	\$245	\$1,755
Air Transport	\$1,493	\$15	\$42	\$1,550
Personal Services	\$358	\$315	\$483	\$1,156
Communications		\$663	\$478	\$1,141
Wholesale Trade		\$481	\$503	\$983
Gasoline Stations	\$639	\$15	\$74	\$728
Manufacturing	\$31	\$304	\$177	\$511
Government	\$196	\$204	\$101	\$501
Agriculture, Fishing, Mining		\$84	\$47	\$131

Source: Tourism Economics

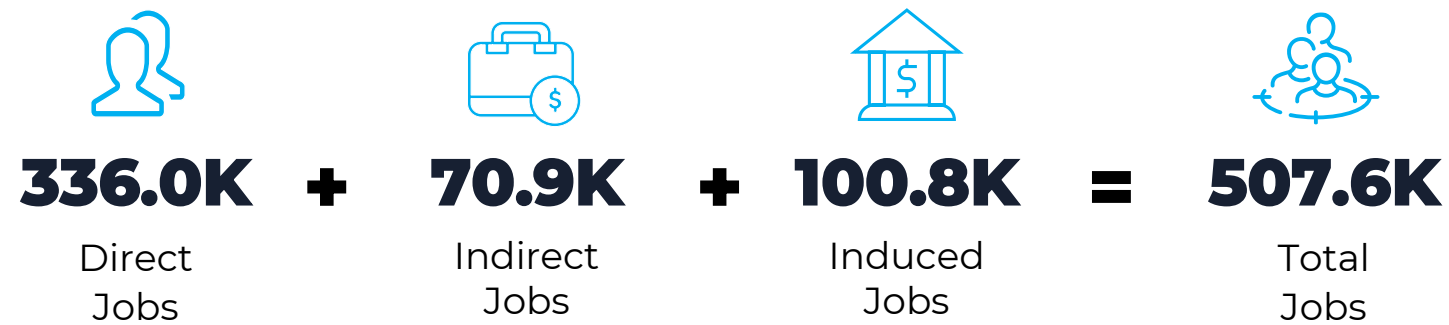
The total value added contribution of visitor spending to the state economy was **\$39.2 billion** in 2023.



Employment Impacts

Visitor activity sustained 335,968 direct jobs in 2023, with an additional 171,626 jobs supported from the indirect and induced impacts of visitor activity. The total jobs impact recovered to 507,594 in 2023, one of every 16 jobs in the Commonwealth. Visitor spending supports the largest number of jobs in the food and beverage industry (131,494).

Summary of Employment Economic Impacts



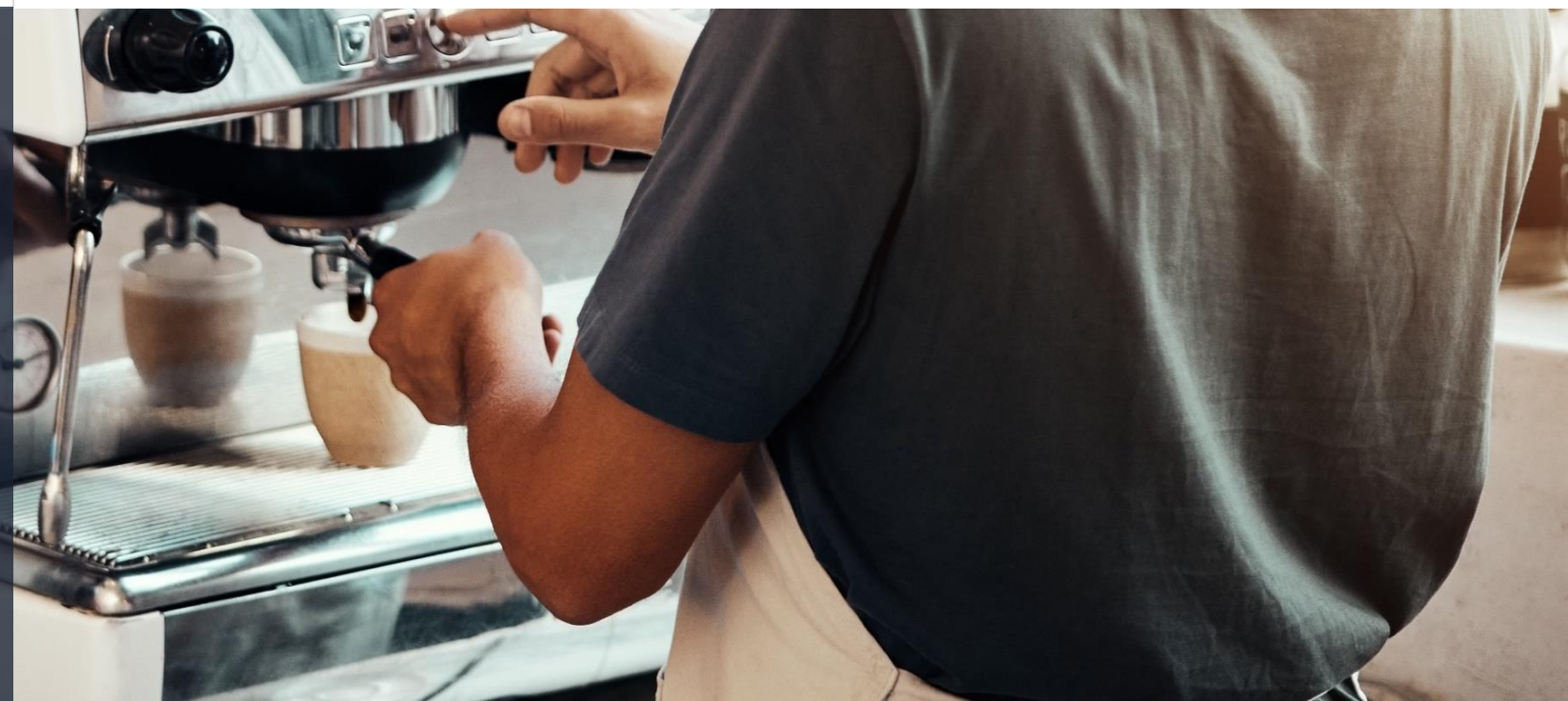
Employment Impacts by Industry (2023)

Amounts in number of jobs

	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Total, all industries	335,968	70,866	100,760	507,594
Food & Beverage	111,416	6,804	13,274	131,494
Recreation and Entertainment	53,238	3,650	2,881	59,769
Lodging	57,172	60	383	57,615
Other Transport	34,470	9,697	4,229	48,396
Retail Trade	32,434	2,050	11,148	45,632
Finance, Insurance and Real Estate	7,542	13,512	11,862	32,917
Business Services	1,287	21,175	9,787	32,249
Education and Health Care		665	28,502	29,167
Personal Services	10,541	4,142	11,078	25,762
Construction and Utilities	11,563	1,498	941	14,003
Gasoline Stations	7,388	181	672	8,241
Government	3,307	1,680	986	5,973
Air Transport	5,321	91	171	5,583
Wholesale Trade		1,858	1,941	3,800
Manufacturing	289	1,943	1,038	3,270
Communications		1,420	1,416	2,836
Agriculture, Fishing, Mining		437	451	888

Source: Tourism Economics

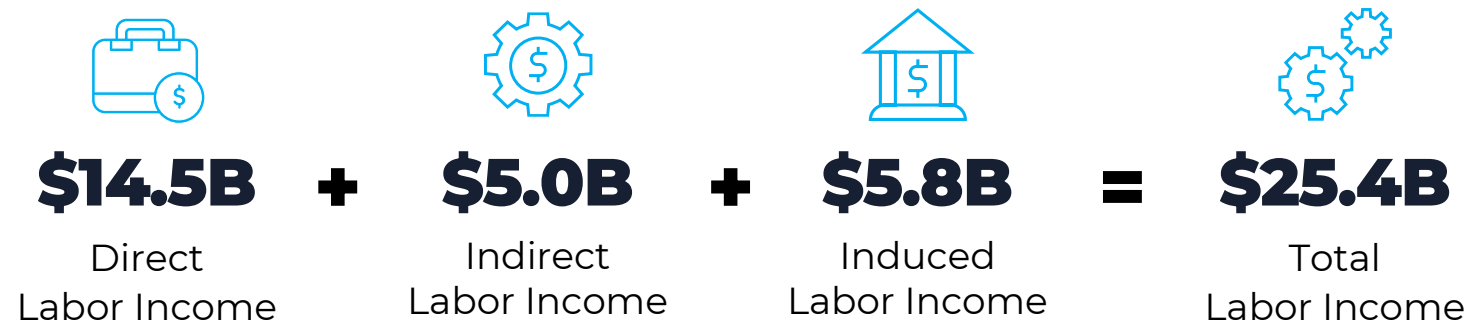
Visitor spending supports **1-in-16 of all jobs** in Pennsylvania, including over **131,000 jobs** in the food and beverage industry.



Labor Income Impacts

Visitor activity generated \$14.5 billion in direct labor income and a total of \$10.9 billion including indirect and induced impacts. There are ten industries in which visitor activity supports more than \$1 billion in total labor income.

Summary of Labor Income Economic Impacts



Labor Income Impacts by Industry (2023)

Amounts in millions

	Direct Labor Income	Indirect Labor Income	Induced Labor Income	Total Labor Income
Total, all industries	\$14,519	\$5,039	\$5,814	\$25,372
Food & Beverage	\$3,020	\$234	\$398	\$3,652
Recreation and Entertainment	\$2,832	\$149	\$94	\$3,076
Business Services	\$71	\$1,873	\$777	\$2,721
Other Transport	\$1,919	\$553	\$203	\$2,675
Lodging	\$2,391	\$3	\$21	\$2,415
Finance, Insurance and Real Estate	\$679	\$724	\$758	\$2,161
Education and Health Care		\$38	\$1,924	\$1,962
Retail Trade	\$1,070	\$93	\$431	\$1,593
Construction and Utilities	\$869	\$163	\$87	\$1,119
Personal Services	\$410	\$270	\$478	\$1,158
Air Transport	\$682	\$11	\$20	\$714
Communications		\$394	\$223	\$617
Government	\$303	\$171	\$96	\$570
Wholesale Trade		\$185	\$190	\$376
Gasoline Stations	\$246	\$7	\$24	\$277
Manufacturing	\$26	\$150	\$74	\$250
Agriculture, Fishing, Mining		\$21	\$14	\$35

Source: Tourism Economics



Visitor spending drives income across industries, including **ten industries with more than \$1 billion** in total income.

FISCAL IMPACT



Fiscal Impacts

Visitor spending, visitor supported jobs, and business sales generated \$10.1 billion in government revenues in 2023.

State and local taxes tallied \$4.8 billion.

Each household in Pennsylvania would need to be taxed an additional **\$903** to replace the visitor-generated taxes received by state and local government in 2023.

Fiscal (Tax) Impacts

Amounts in \$ millions

	2018	2019	2020	2021	2022	2023
Total Tax Revenues	\$9,658	\$10,046	\$7,650	\$8,808	\$9,623	\$10,121
Federal Taxes	\$5,013	\$5,235	\$4,071	\$4,615	\$4,972	\$5,286
Personal Income	\$1,540	\$1,608	\$1,278	\$1,533	\$1,706	\$1,818
Corporate	\$549	\$573	\$398	\$399	\$417	\$440
Indirect Business	\$422	\$440	\$341	\$371	\$423	\$442
Social Insurance	\$2,503	\$2,615	\$2,053	\$2,312	\$2,426	\$2,586
State and Local Taxes	\$4,645	\$4,811	\$3,579	\$4,194	\$4,651	\$4,835
Sales	\$1,697	\$1,743	\$1,143	\$1,502	\$1,786	\$1,884
Bed Tax	\$218	\$229	\$108	\$179	\$241	\$254
Personal Income	\$481	\$493	\$411	\$471	\$515	\$549
Corporate	\$235	\$246	\$169	\$171	\$181	\$191
Social Insurance	\$35	\$36	\$24	\$24	\$22	\$24
Excise and Fees	\$555	\$579	\$414	\$422	\$447	\$448
Property	\$1,424	\$1,485	\$1,311	\$1,425	\$1,458	\$1,485

Source: Tourism Economics

Fiscal (Tax) Impacts – State and Local Breakouts

Amounts in \$ millions

	2019	2020	2021	2022	2023
State Taxes	\$2,567	\$1,793	\$2,154	\$2,469	\$2,596
Sales	\$1,617	\$1,067	\$1,378	\$1,639	\$1,729
Bed Tax	\$0	\$0	\$0	\$0	\$0
Personal Income	\$351	\$293	\$336	\$368	\$392
Corporate	\$246	\$169	\$171	\$181	\$191
Social Insurance	\$36	\$24	\$24	\$22	\$24
Excise and Fees	\$313	\$237	\$242	\$256	\$257
Property	\$3	\$3	\$3	\$3	\$3
Local Taxes	\$2,244	\$1,786	\$2,040	\$2,182	\$2,239
Sales	\$125	\$76	\$124	\$147	\$155
Bed Tax	\$229	\$108	\$179	\$241	\$254
Personal Income	\$142	\$118	\$134	\$147	\$157
Corporate	\$0	\$0	\$0	\$0	\$0
Social Insurance	\$0	\$0	\$0	\$0	\$0
Excise and Fees	\$266	\$177	\$180	\$191	\$191
Property	\$1,481	\$1,308	\$1,422	\$1,455	\$1,482

Source: Tourism Economics



Visitor spending, reduces the tax burden by **\$903 per household** in Pennsylvania.

ECONOMIC IMPACT IN CONTEXT



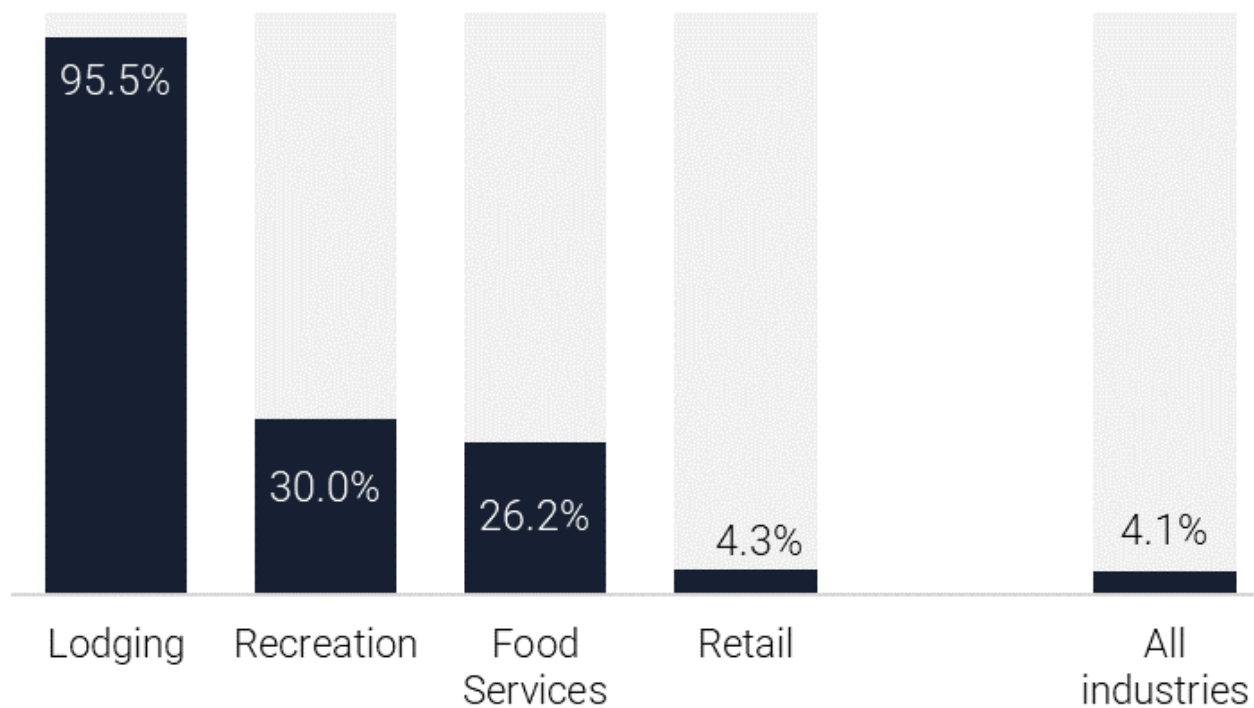
Tourism is an economic driver for Pennsylvania

Visitor activity supported a significant portion of direct employment in several key industries in Pennsylvania. Visitors sustained nearly all employment in the lodging sector, 30% of recreation employment, and 26% of food services employment.

Overall, visitor-supported direct employment accounted for approximately 4% of all jobs in Pennsylvania in 2023.

Direct Visitor Employment Intensity

Amounts in percentage of total industry employment, direct only



Source: Tourism Economics

Economic Impact In Context



\$47.9B VISITOR SPENDING

The \$47.9 billion in visitor spending means that more than **\$138 million** was spent **every day** by visitors in Pennsylvania, on average.



\$25.4B LABOR INCOME

The \$25.6 billion in total income generated by tourism is the equivalent of **\$4,738 per household** in Pennsylvania.



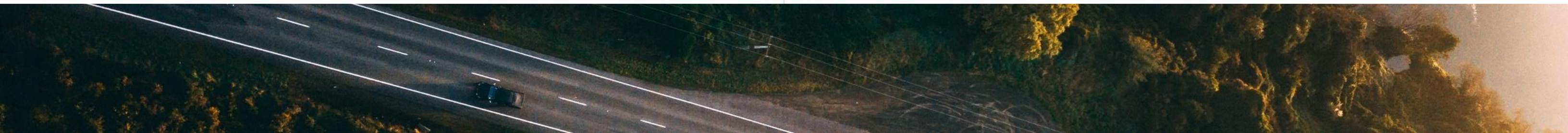
507,594 JOBS

The number of jobs sustained by tourism is enough to employ the entire population of Pittsburgh, Allentown, and Bethlehem **combined**.



\$4.8B STATE & LOCAL TAXES

Each household in Pennsylvania would need to be taxed an additional **\$903** to replace the visitor taxes received by the state and local governments in 2023 – enough to cover the average American's per person holiday spending (\$902).



2023 COUNTY IMPACTS

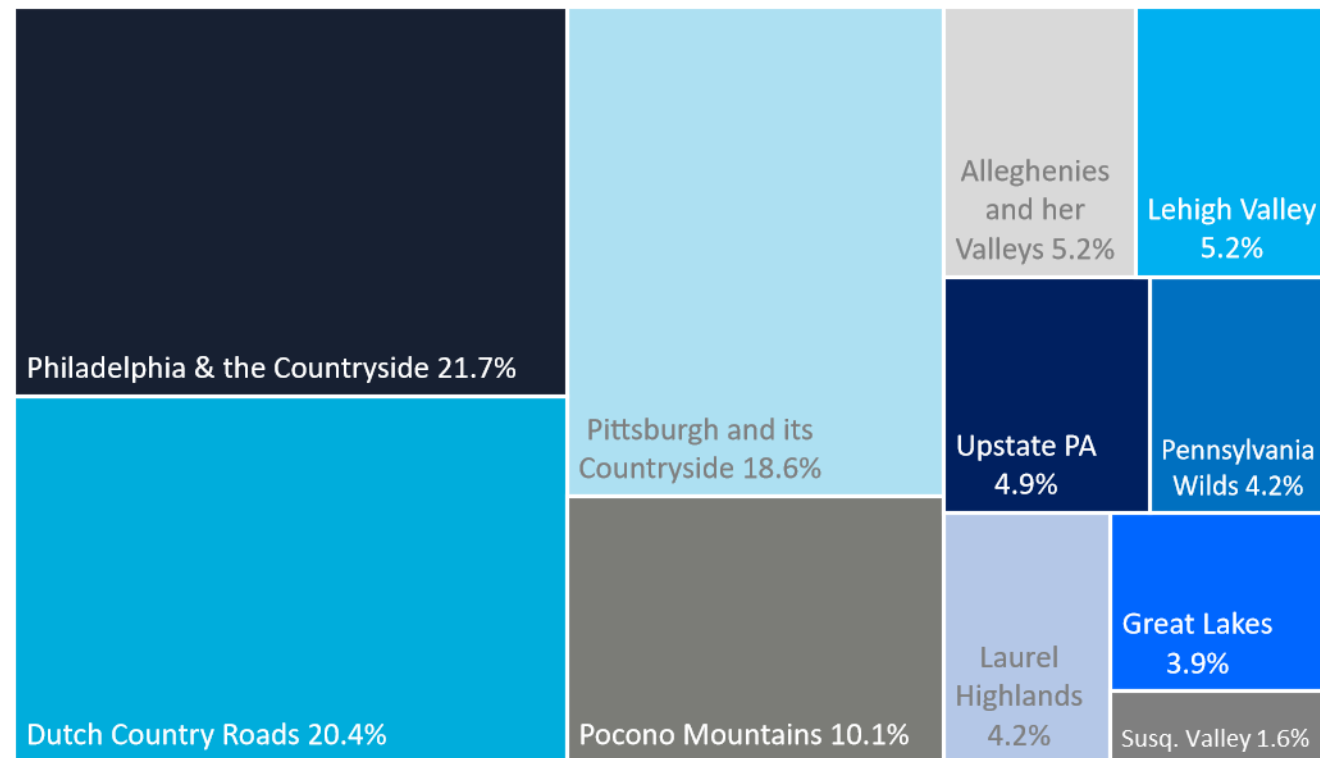


■ Pennsylvania Visitor Spending by Region

Visitor spending shares in Philadelphia and Pittsburgh increased as large cities continued to have faster growth due to ongoing recovery from the pandemic.

Pennsylvania Regional Spending Shares

Visitor Spending Shares



Source: Tourism Economics



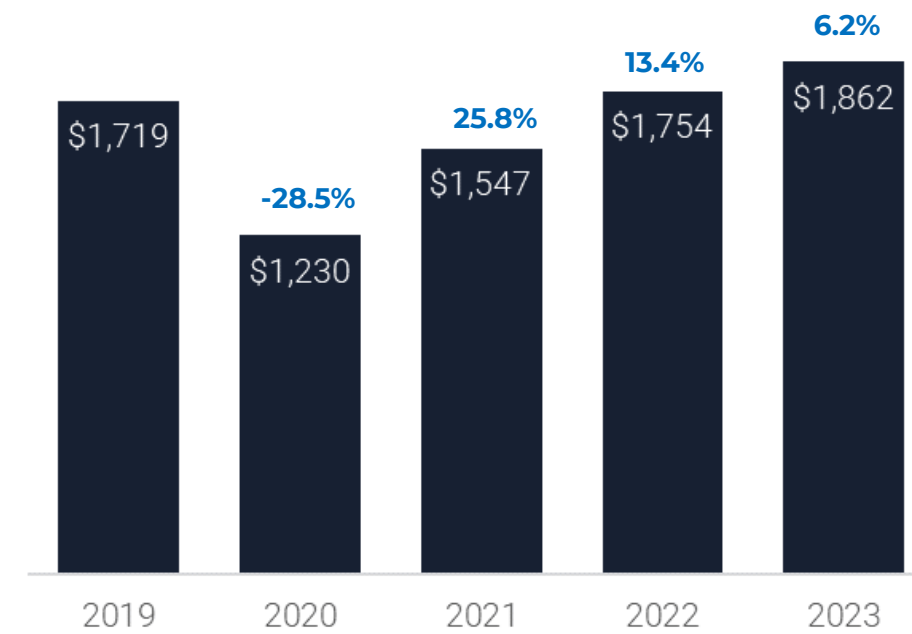
The tourism industry in **Pennsylvania** consists of ten regions across the state with the **Philadelphia** and **Dutch Country Roads** region comprising of the largest share of visitor spending.

Visitors to the Great Lakes spent **\$1.9 billion** in 2023.



Great Lakes Visitor Spending

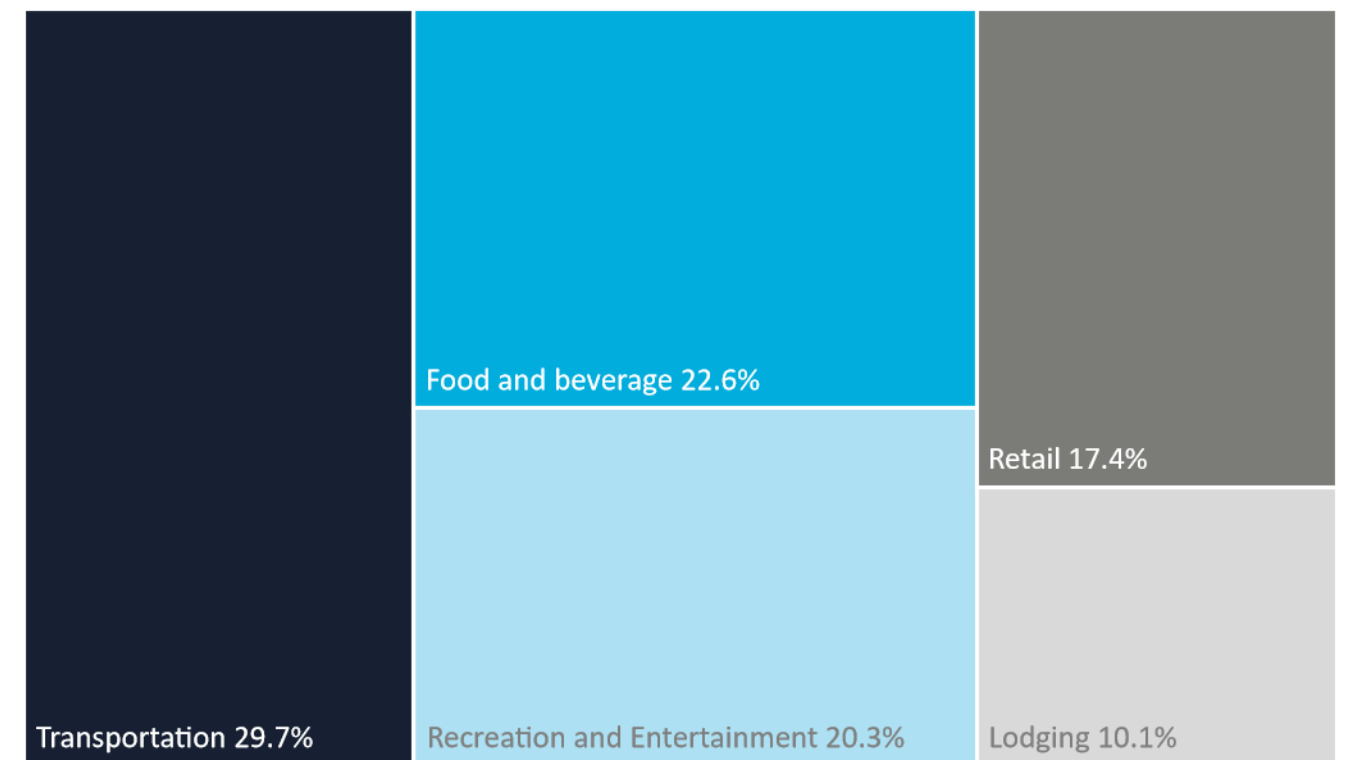
Amounts in \$ millions



Source: Tourism Economics

Visitor Spending by Category

Percent of total



Source: Tourism Economics

Great Lakes Visitor Spending

Great Lakes Visitor Spending

Amounts in \$ millions

	Lodging	Food and beverage	Recreation	Retail	Transportation	Total
Great Lakes	\$187.9	\$420.6	\$377.2	\$323.5	\$553.0	\$1,862.1
Percent Change	5.1%	7.3%	11.3%	4.8%	3.2%	6.2%
Crawford	\$13.3	\$65.5	\$43.4	\$43.0	\$101.1	\$266.2
Erie	\$127.8	\$245.9	\$242.8	\$195.8	\$293.5	\$1,105.7
Mercer	\$36.1	\$81.1	\$66.5	\$62.6	\$88.4	\$334.6
Venango	\$10.7	\$28.1	\$24.5	\$22.2	\$70.0	\$155.5

Source: Tourism Economics

Note: Lodging spending is calculated as an industry and includes the value of short-term rentals and second homes. Transportation includes both air and local transportation.

Great Lakes Economic Impacts

Great Lakes Visitor Economy Direct Impacts

Amounts in \$ millions, number of jobs, and 2023 percent % change

	Visitor Spend	Employment	Labor Income	State & Local Taxes	Federal Taxes
Great Lakes	\$1,862.1	13,555	\$426.8	\$92.9	\$100.6
Percent Change	6.2%	3.0%	5.7%	4.4%	4.8%
Crawford	\$266.2	2,061	\$62.5	\$12.7	\$14.7
Erie	\$1,105.7	7,640	\$259.0	\$57.1	\$60.5
Mercer	\$334.6	2,569	\$71.4	\$15.8	\$17.3
Venango	\$155.5	1,285	\$33.9	\$7.3	\$8.1

Source: Tourism Economics

Great Lakes Visitor Economy Total Impacts

Amounts in \$ millions, number of jobs, and 2023 percent % change

	Total Business Sales	Employment	Labor Income	State & Local Taxes	Federal Taxes
Great Lakes	\$2,985.7	20,961	\$784.5	\$173.8	\$181.0
Percent Change	4.1%	2.8%	5.5%	4.2%	5.1%
Crawford	\$432.5	3,258	\$116.6	\$24.5	\$26.5
Erie	\$1,766.6	11,799	\$476.3	\$105.6	\$108.9
Mercer	\$538.4	3,940	\$129.5	\$29.7	\$30.9
Venango	\$248.2	1,964	\$62.1	\$13.9	\$14.7

Source: Tourism Economics



Great Lakes Visitor Economy Timeline

Employment directly supported by visitor spending grew 3.0% in 2023, an increase of 389 jobs.

Great Lakes Direct Spending Timeline

Amounts in \$ millions, 2023 percent % change

	2019	2020	2021	2022	2023
Great Lakes	\$1,719.1	\$1,229.6	\$1,546.5	\$1,753.8	\$1,862.1
Percent Change	1.7%	-28.5%	25.8%	13.4%	6.2%
Crawford	251.8	177.6	220.3	257.4	266.2
Erie	\$1,009.8	\$734.0	\$927.7	\$1,038.8	\$1,105.7
Mercer	\$312.0	\$221.4	\$270.7	\$309.8	\$334.6
Venango	\$145.5	\$96.6	\$127.8	\$147.8	\$155.5

Source: Tourism Economics

Great Lakes Direct Employment Timeline

Amounts in \$ millions, 2023 percent % change

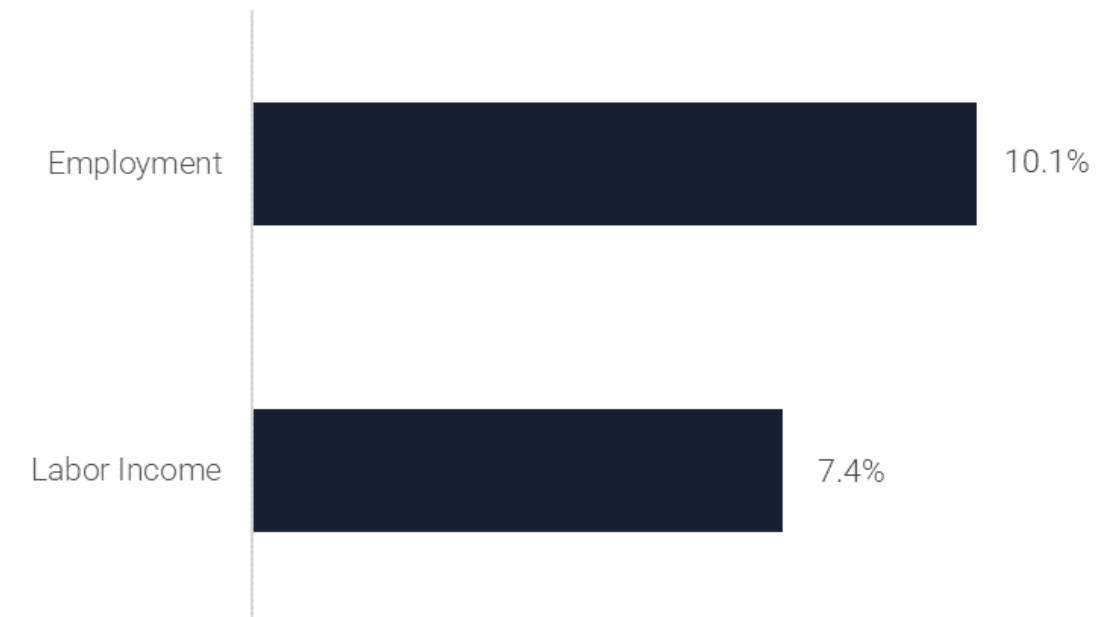
	2019	2020	2021	2022	2023
Great Lakes	13,938	11,018	12,400	13,166	13,555
Percent Change	1.5%	-20.9%	12.5%	6.2%	3.0%
Crawford	2,129	1,738	1,940	2,046	2,061
Erie	7,983	6,161	6,959	7,414	7,640
Mercer	2,595	2,052	2,314	2,442	2,569
Venango	1,231	1,066	1,188	1,264	1,285

Source: Tourism Economics

Total visitor supported employment and labor income, including indirect, and induced impacts, comprised 10.1% and 7.4% of the total jobs and wages earned in the Great Lakes Region.

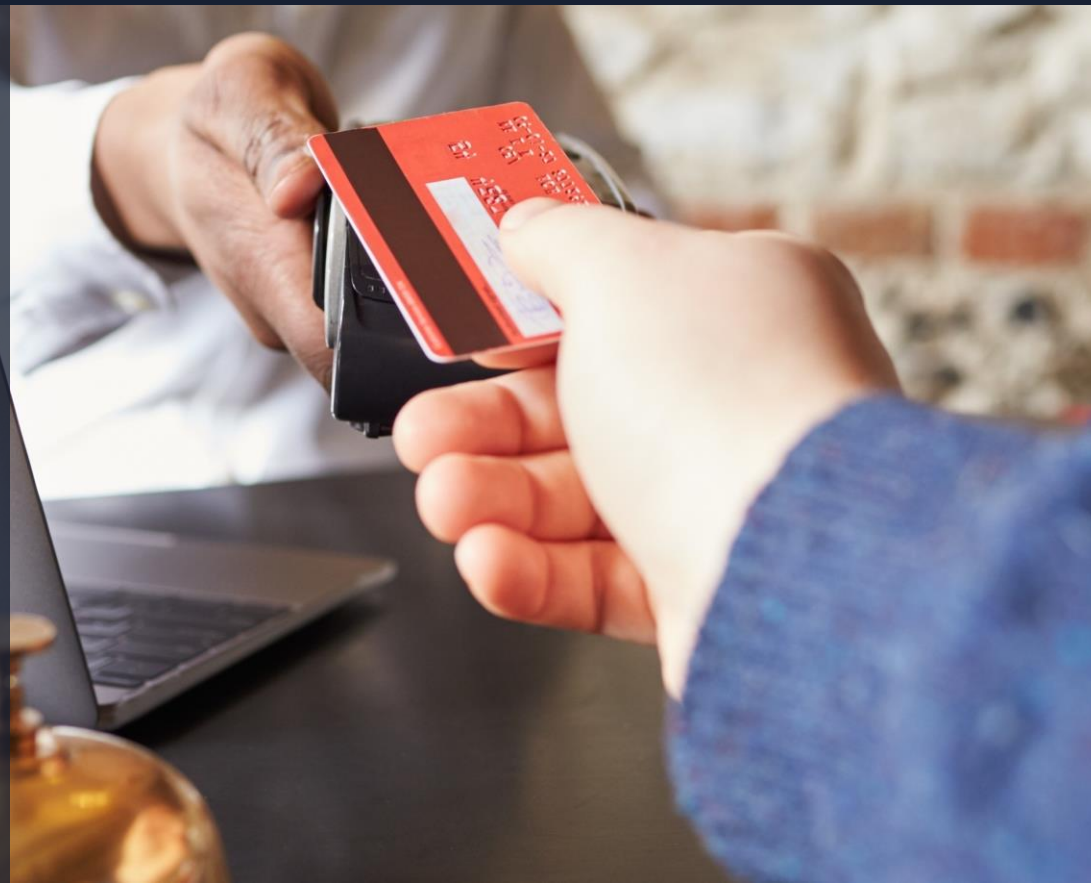
Great Lakes Tourism Share of Region Economy (2023)

Visitor supported share of employment and payroll (Total Impacts)



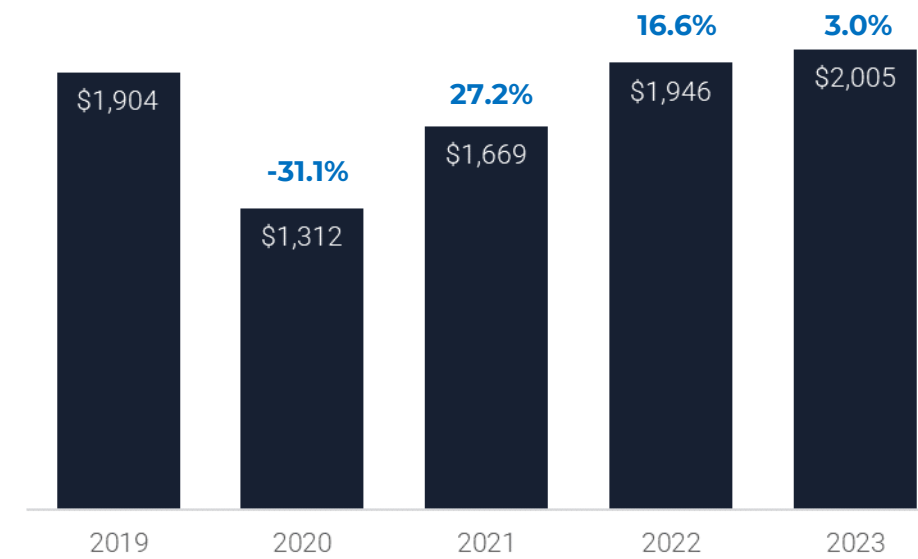
Source: BLS, Tourism Economics

Visitors to the Laurel Highlands spent **\$2.0 billion** in 2023.



Laurel Highlands Visitor Spending

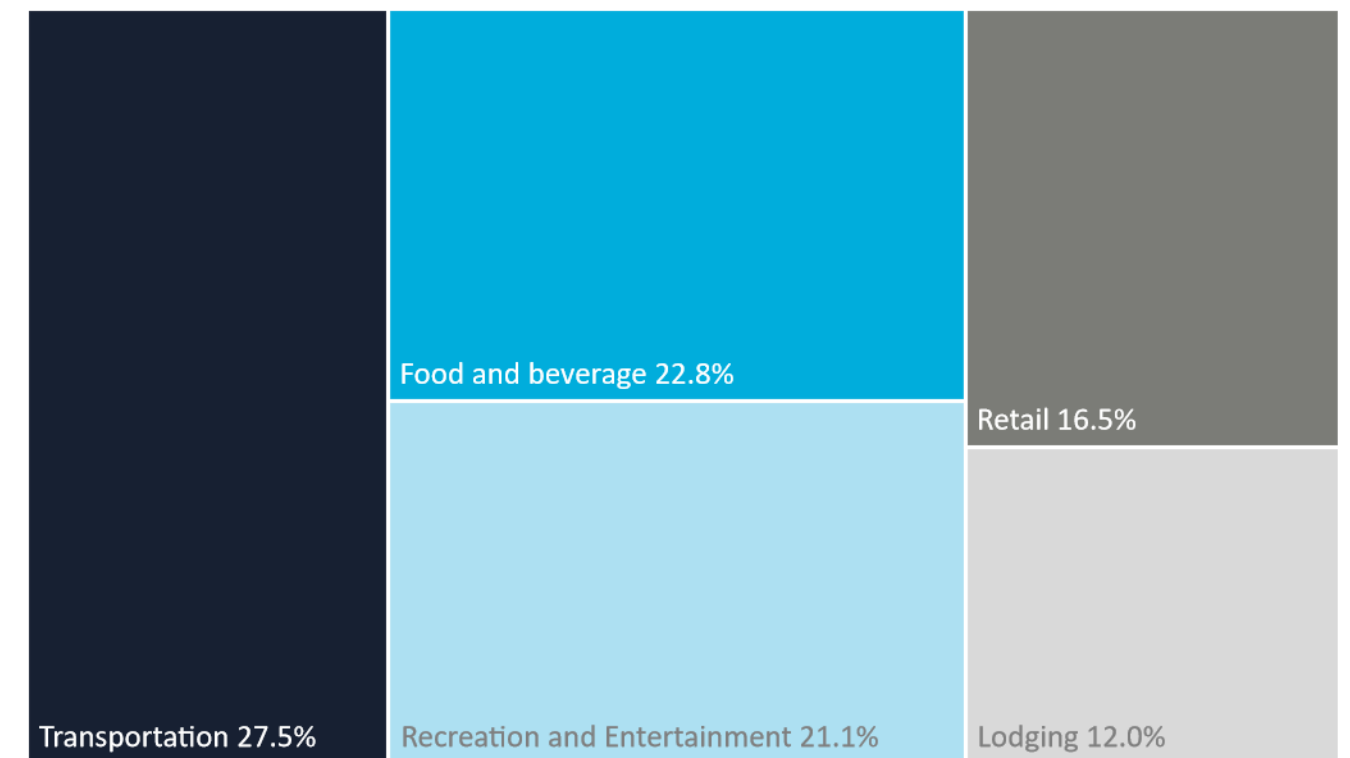
Amounts in \$ millions



Source: Tourism Economics

Visitor Spending by Category

Percent of total



Source: Tourism Economics

Laurel Highlands Visitor Spending

Laurel Highlands Visitor Spending

Amounts in \$ millions

	Lodging	Food and beverage	Recreation	Retail	Transportation	Total
Laurel Highlands	\$240.2	\$457.9	\$423.8	\$331.8	\$551.5	\$2,005.1
Percent Change	0.6%	4.0%	7.9%	1.2%	1.0%	3.0%
Fayette	\$106.5	\$159.1	\$140.6	\$108.9	\$168.9	\$683.9
Somerset	\$62.5	\$107.8	\$89.8	\$71.5	\$138.8	\$470.5
Westmoreland	\$71.2	\$191.0	\$193.3	\$151.4	\$243.8	\$850.7

Source: Tourism Economics

Note: Lodging spending is calculated as an industry and includes the value of short-term rentals and second homes. Transportation includes both air and local transportation.

Laurel Highlands Economic Impacts

Laurel Highlands Visitor Economy Direct Impacts

Amounts in \$ millions, number of jobs, and 2023 percent % change

	Visitor Spend	Employment	Labor Income	State & Local Taxes	Federal Taxes
Laurel Highlands	\$2,005.1	14,894	\$511.0	\$103.1	\$116.7
Percent Change	3.0%	2.5%	4.1%	2.4%	3.3%
Fayette	\$683.9	5,679	\$213.3	\$38.9	\$45.7
Somerset	\$470.5	3,251	\$103.9	\$23.2	\$25.3
Westmoreland	\$850.7	5,964	\$193.8	\$41.0	\$45.8

Source: Tourism Economics

Laurel Highlands Visitor Economy Total Impacts

Amounts in \$ millions, number of jobs, and 2023 percent % change

	Total Business Sales	Employment	Labor Income	State & Local Taxes	Federal Taxes
Laurel Highlands	\$3,250.9	22,921	\$965.2	\$195.8	\$210.8
Percent Change	1.1%	2.2%	3.8%	2.8%	4.1%
Fayette	\$1,104.7	8,238	\$405.2	\$74.3	\$82.9
Somerset	\$712.3	4,693	\$190.6	\$44.0	\$45.8
Westmoreland	\$1,433.9	9,990	\$369.4	\$77.5	\$82.1

Source: Tourism Economics



Laurel Highlands Visitor Economy Timeline

Employment directly supported by visitor spending grew 2.5% in 2023, an increase of 363 jobs.

Laurel Highlands Direct Spending Timeline

Amounts in \$ millions, 2023 percent % change

	2019	2020	2021	2022	2023
Laurel Highlands	\$1,903.7	\$1,311.9	\$1,669.2	\$1,946.0	\$2,005.1
Percent Change	4.1%	-31.1%	27.2%	16.6%	3.0%
Fayette	\$724.0	\$458.2	\$602.4	\$682.3	\$683.9
Somerset	\$412.4	\$331.9	\$394.2	\$476.9	\$470.5
Westmoreland	\$767.3	\$521.8	\$672.6	\$786.8	\$850.7

Source: Tourism Economics

Laurel Highlands Direct Employment Timeline

Amounts in \$ millions, 2023 percent % change

	2019	2020	2021	2022	2023
Laurel Highlands	15,185	12,001	13,546	14,531	14,894
Percent Change	2.3%	-21.0%	12.9%	7.3%	2.5%
Fayette	5,985	4,709	5,298	5,628	5,679
Somerset	3,345	2,626	2,921	3,225	3,251
Westmoreland	5,855	4,666	5,326	5,679	5,964

Source: Tourism Economics

Total visitor supported employment and labor income, including indirect, and induced impacts, comprised 12.0% and 9.4% of the total jobs and wages earned in the Laurel Highlands Region.

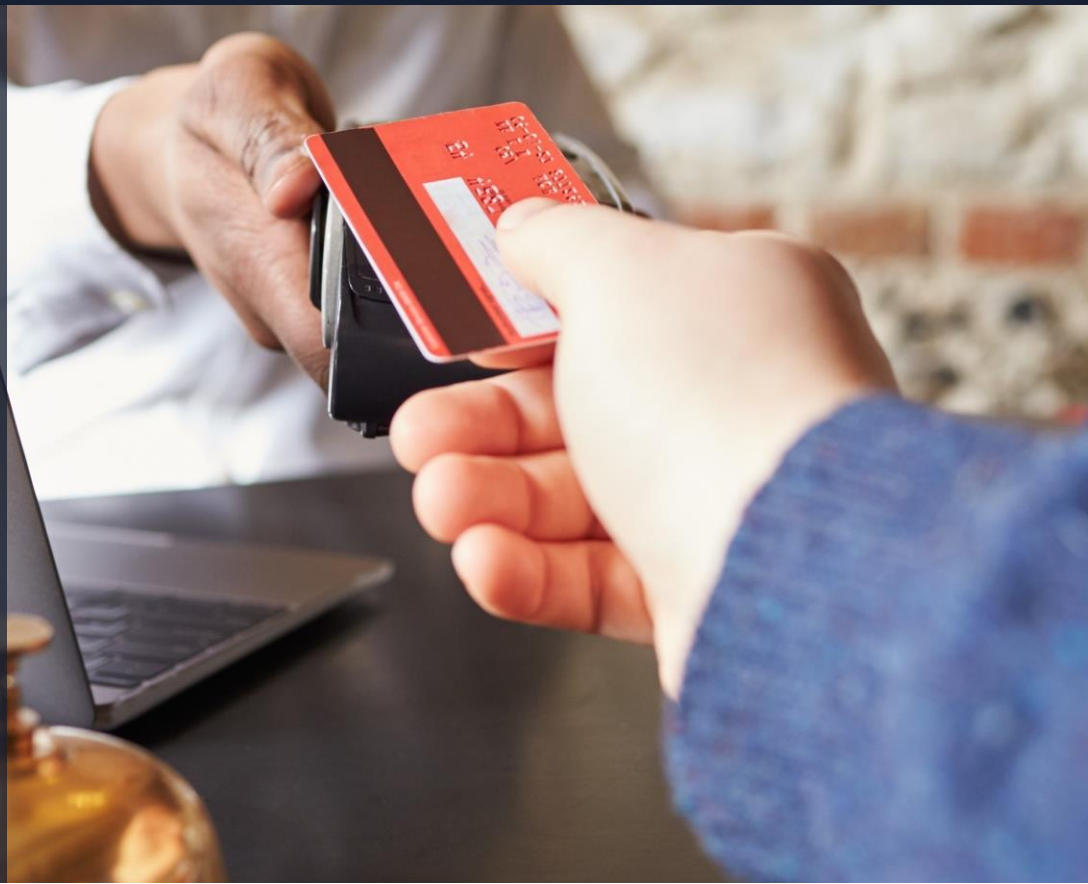
Laurel Highlands Tourism Share of Region Economy (2023)

Visitor supported share of employment and payroll (Total Impacts)



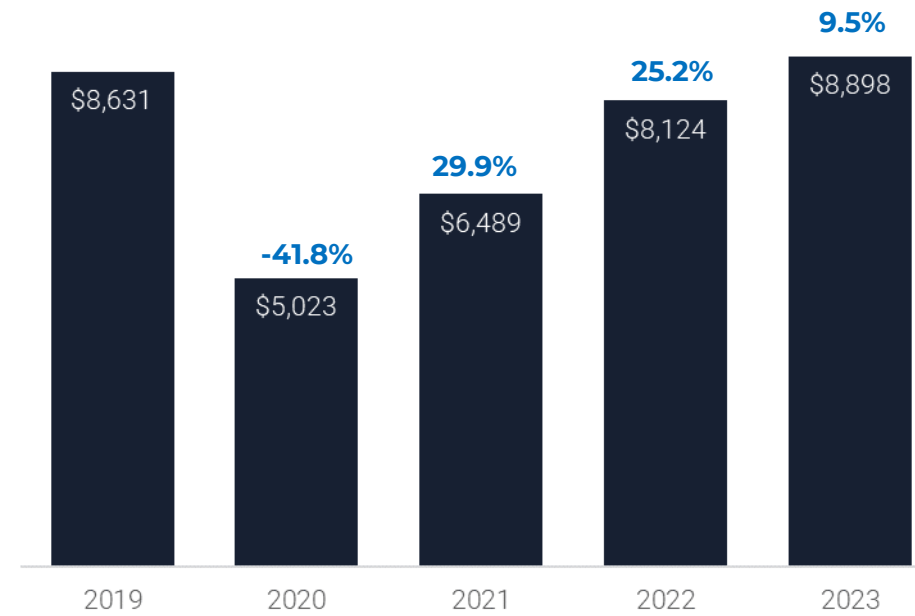
Source: BLS, Tourism Economics

Visitors to Pittsburgh & its Countryside spent **\$8.9 billion** in 2023.



Pittsburgh & its Countryside Visitor Spending

Amounts in \$ millions



Source: Tourism Economics

Pittsburgh & its Countryside Visitor Spending

Pittsburgh & its Countryside Visitor Spending

Amounts in \$ millions

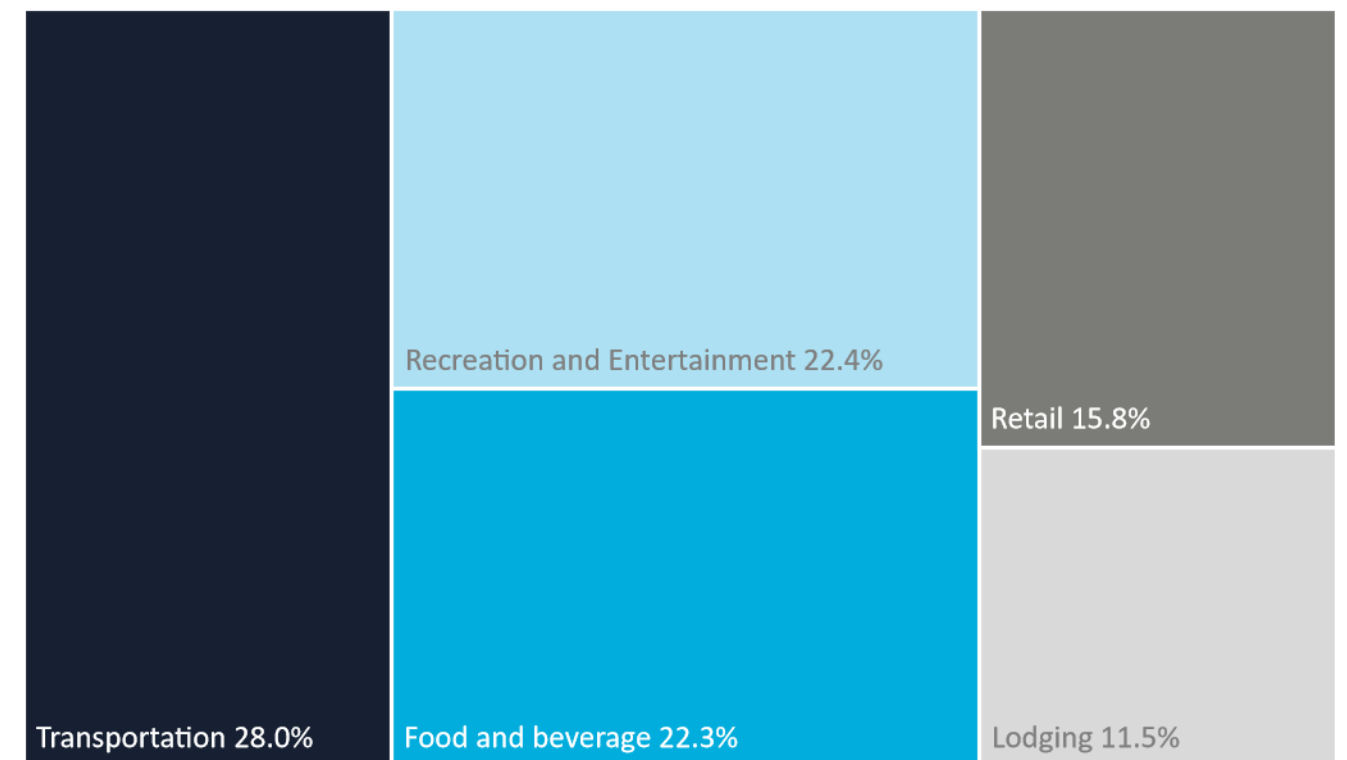
	Lodging	Food and beverage	Recreation	Retail	Transportation	Total
Pittsburgh and its Countryside	\$1,019.7	\$1,984.5	\$1,995.6	\$1,402.9	\$2,495.5	\$8,898.2
Percent Change	10.8%	10.6%	14.4%	7.5%	5.8%	9.5%
Allegheny	\$804.1	\$1,470.6	\$1,477.1	\$1,026.0	\$1,855.8	\$6,633.6
Armstrong	\$6.2	\$22.6	\$30.3	\$15.3	\$32.6	\$107.1
Beaver	\$32.8	\$80.1	\$63.8	\$58.2	\$115.7	\$350.6
Butler	\$74.6	\$156.5	\$133.9	\$117.7	\$183.6	\$666.3
Greene	\$8.0	\$20.2	\$16.2	\$12.4	\$26.3	\$83.0
Indiana	\$17.0	\$45.1	\$32.7	\$30.0	\$51.2	\$175.9
Lawrence	\$9.6	\$37.8	\$42.4	\$29.2	\$43.3	\$162.3
Washington	\$67.6	\$151.7	\$199.1	\$114.1	\$187.0	\$719.5

Source: Tourism Economics

Note: Lodging spending is calculated as an industry and includes the value of short-term rentals and second homes. Transportation includes both air and local transportation.

Visitor Spending by Category

Percent of total



Source: Tourism Economics

Pittsburgh & its Countryside Economic Impacts

Pittsburgh & its Countryside Visitor Economy Direct Impacts

Amounts in \$ millions, number of jobs, and 2023 percent % change

	Visitor Spend	Employment	Labor Income	State & Local Taxes	Federal Taxes
Pittsburgh and its Countryside	\$8,898.2	57,891	\$2,462.9	\$475.9	\$546.5
Percent Change	9.5%	8.2%	11.5%	6.8%	10.2%
Allegheny	\$6,633.6	41,857	\$1,898.2	\$364.0	\$417.1
Armstrong	\$107.1	721	\$21.3	\$4.7	\$5.3
Beaver	\$350.6	2,427	\$85.6	\$17.1	\$19.7
Butler	\$666.3	4,246	\$144.2	\$31.7	\$34.6
Greene	\$83.0	556	\$15.5	\$3.7	\$4.0
Indiana	\$175.9	1,438	\$42.4	\$8.6	\$9.8
Lawrence	\$162.3	1,054	\$38.0	\$7.6	\$9.0
Washington	\$719.5	5,593	\$217.7	\$38.3	\$46.9

Source: Tourism Economics

Pittsburgh & its Countryside Visitor Economy Total Impacts

Amounts in \$ millions, number of jobs, and 2023 percent % change

	Total Business Sales	Employment	Labor Income	State & Local Taxes	Federal Taxes
Pittsburgh and its Countryside	\$14,910.6	89,019	\$4,719.9	\$883.2	\$971.5
Percent Change	8.9%	7.0%	9.8%	6.0%	9.4%
Allegheny	\$11,114.0	63,284	\$3,658.1	\$671.2	\$740.3
Armstrong	\$175.0	1,286	\$37.9	\$9.1	\$9.6
Beaver	\$583.0	4,093	\$155.1	\$32.1	\$34.5
Butler	\$1,098.4	6,717	\$279.8	\$59.5	\$62.3
Greene	\$134.3	894	\$27.7	\$7.1	\$7.2
Indiana	\$301.0	2,378	\$82.3	\$16.4	\$17.6
Lawrence	\$268.8	1,838	\$65.9	\$14.5	\$16.0
Washington	\$1,236.1	8,529	\$413.0	\$73.2	\$83.9

Source: Tourism Economics



Pittsburgh & its Countryside Visitor Economy Timeline

Employment directly supported by visitor spending grew 8.2% in 2023, an increase of 4,372 jobs.

Pittsburgh & its Countryside Direct Spending Timeline

Amounts in \$ millions, 2023 percent % change

	2019	2020	2021	2022	2023
Pittsburgh and its Countryside	\$8,631.2	\$5,023.5	\$6,489.3	\$8,124.3	\$8,898.2
Percent Change	2.5%	-41.8%	29.2%	25.2%	9.5%
Allegheny	\$6,512.9	\$3,606.4	\$4,677.9	\$6,039.3	\$6,633.6
Armstrong	\$93.5	\$68.3	\$90.0	\$100.4	\$107.1
Beaver	\$310.0	\$221.2	\$284.5	\$324.7	\$350.6
Butler	\$626.1	\$399.9	\$507.7	\$601.8	\$666.3
Greene	\$78.0	\$58.2	\$70.7	\$77.7	\$83.0
Indiana	\$169.5	\$111.4	\$140.2	\$165.6	\$175.9
Lawrence	\$132.6	\$96.6	\$124.2	\$149.1	\$162.3
Washington	\$708.7	\$461.4	\$594.1	\$665.9	\$719.5

Source: Tourism Economics

Pittsburgh & its Countryside Direct Employment Timeline

Amounts in \$ millions, 2023 percent % change

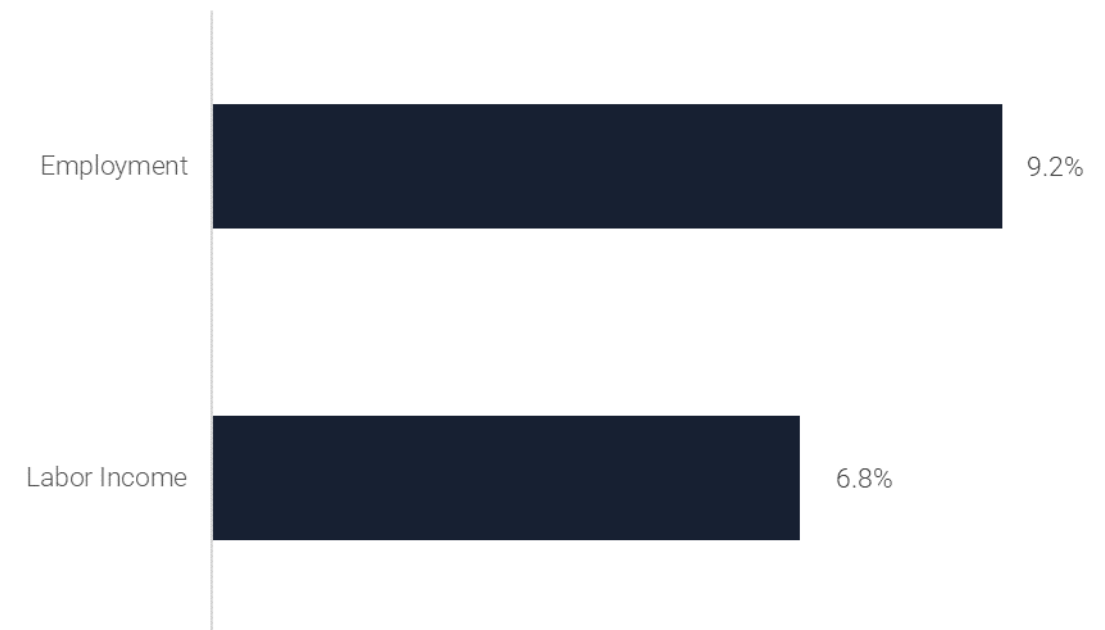
	2019	2020	2021	2022	2023
Pittsburgh and its Countryside	59,868	43,472	48,326	53,519	57,891
Percent Change	1.5%	-27.4%	11.2%	10.7%	8.2%
Allegheny	43,848	30,891	34,223	38,286	41,857
Armstrong	621	535	635	690	721
Beaver	2,235	1,874	2,125	2,317	2,427
Butler	4,199	3,283	3,706	3,949	4,246
Greene	509	450	503	526	556
Indiana	1,506	1,161	1,297	1,412	1,438
Lawrence	976	831	921	980	1,054
Washington	5,974	4,448	4,915	5,359	5,593

Source: Tourism Economics

Total visitor supported employment and labor income, including indirect, and induced impacts, comprised 9.2% and 6.8% of the total jobs and wages earned in Pittsburgh and its Countryside.

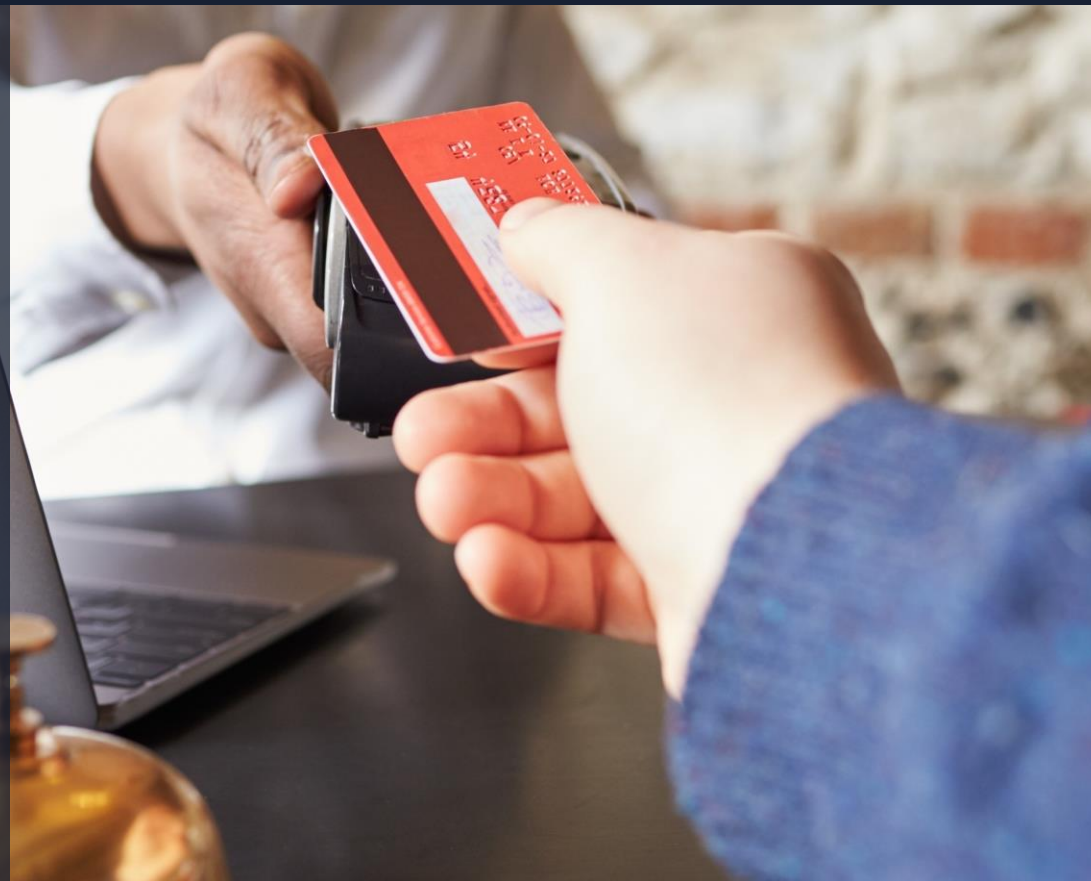
Pittsburgh & its Countryside Tourism Share of Region Economy (2023)

Visitor supported share of employment and payroll (Total Impacts)



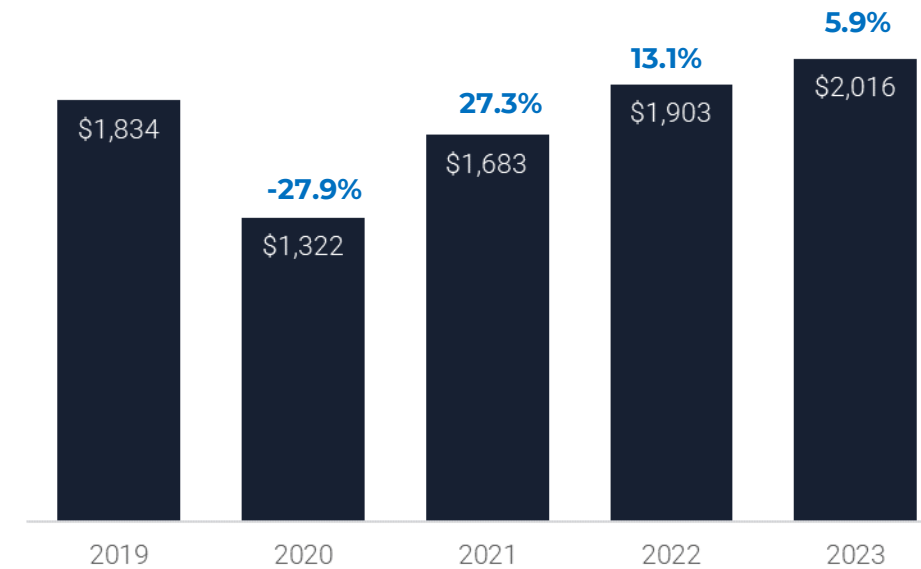
Source: BLS, Tourism Economics

Visitors to the Pennsylvania Wilds spent **\$2.0 billion** in 2023.



Pennsylvania Wilds Visitor Spending

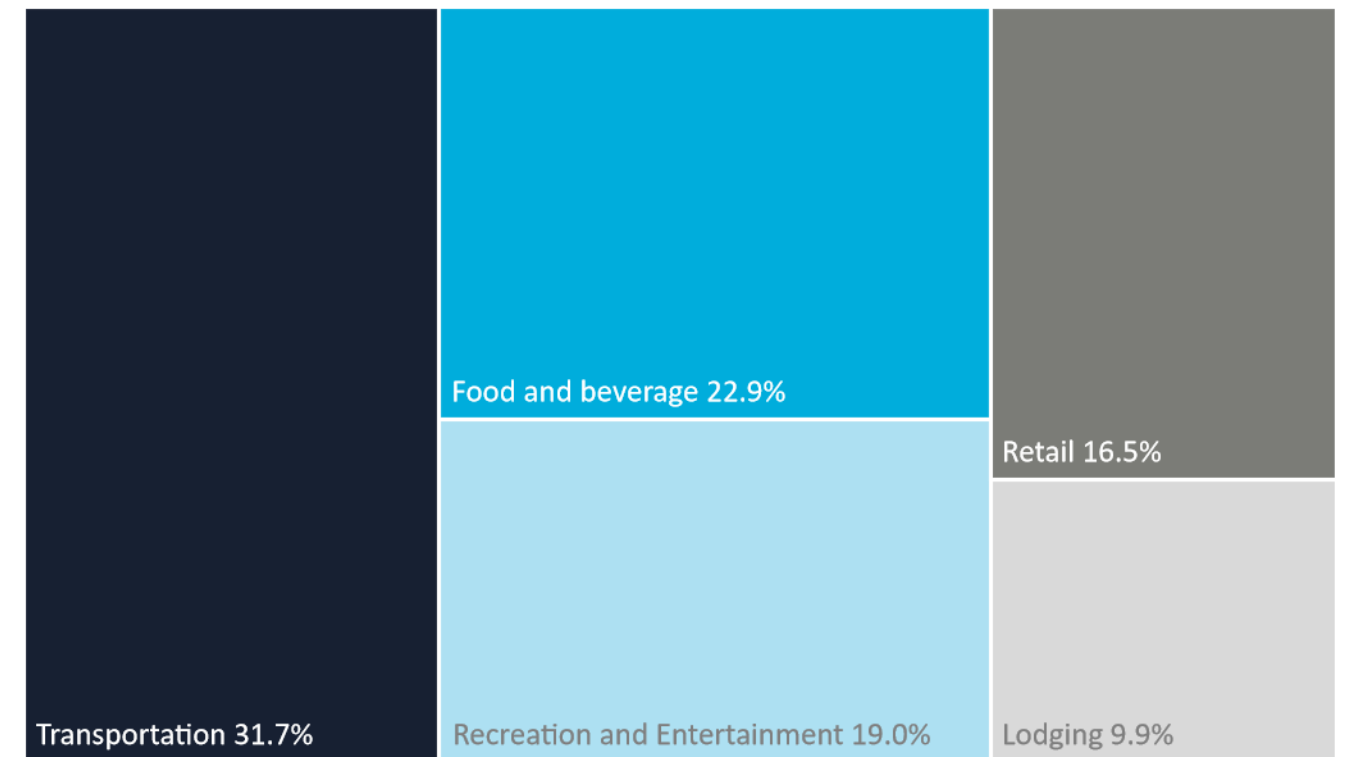
Amounts in \$ millions



Source: Tourism Economics

Visitor Spending by Category

Percent of total



Source: Tourism Economics

Pennsylvania Wilds Visitor Spending

Pennsylvania Wilds Visitor Spending

Amounts in \$ millions

	Lodging	Food and beverage	Recreation	Retail	Transportation	Total
Pennsylvania Wilds	\$198.8	\$461.8	\$384.0	\$332.9	\$638.5	\$2,016.0
Percent Change	5.7%	7.3%	11.7%	5.6%	2.1%	5.9%
Cameron	\$1.0	\$2.5	\$3.7	\$2.1	\$3.9	\$13.2
Clarion	\$16.3	\$33.4	\$29.2	\$23.9	\$39.5	\$142.3
Clearfield	\$34.8	\$77.2	\$65.3	\$57.8	\$105.5	\$340.7
Clinton	\$13.4	\$38.2	\$32.9	\$26.4	\$55.1	\$166.0
Elk	\$10.3	\$23.7	\$18.8	\$17.7	\$24.3	\$94.8
Forest	\$7.2	\$8.1	\$8.7	\$7.3	\$9.6	\$40.9
Jefferson	\$8.2	\$25.4	\$21.6	\$18.5	\$45.7	\$119.4
Lycoming	\$52.9	\$107.8	\$79.7	\$69.6	\$135.9	\$445.8
McKean	\$16.0	\$41.4	\$33.9	\$28.8	\$63.9	\$183.9
Potter	\$7.8	\$11.2	\$8.9	\$8.9	\$14.3	\$51.1
Tioga	\$23.1	\$51.5	\$45.8	\$37.7	\$68.9	\$227.0
Warren	\$7.7	\$41.4	\$35.6	\$34.1	\$72.0	\$190.8

Source: Tourism Economics

Note: Lodging spending is calculated as an industry and includes the value of short-term rentals and second homes. Transportation includes both air and local transportation.

Pennsylvania Wilds Economic Impacts

Pennsylvania Wilds Visitor Economy Direct Impacts

Amounts in \$ millions, number of jobs, and 2023 percent % change

	Visitor Spend	Employment	Labor Income	State & Local Taxes	Federal Taxes
Pennsylvania Wilds	\$2,016.0	13,428	\$423.4	\$94.4	\$103.2
Percent Change	5.9%	2.7%	6.0%	4.0%	5.0%
Cameron	\$13.2	85	\$1.8	\$0.5	\$0.5
Clarion	\$142.3	1,201	\$33.4	\$6.8	\$7.8
Clearfield	\$340.7	1,852	\$63.7	\$15.6	\$16.2
Clinton	\$166.0	1,061	\$31.7	\$7.4	\$8.0
Elk	\$94.8	657	\$17.2	\$4.3	\$4.4
Forest	\$40.9	198	\$5.5	\$1.7	\$1.6
Jefferson	\$119.4	826	\$24.1	\$5.5	\$5.9
Lycoming	\$445.8	2,982	\$105.8	\$21.8	\$24.8
McKean	\$183.9	1,248	\$39.3	\$8.6	\$9.5
Potter	\$51.1	294	\$7.7	\$2.3	\$2.2
Tioga	\$227.0	1,788	\$55.6	\$11.5	\$12.8
Warren	\$190.8	1,237	\$37.5	\$8.4	\$9.5

Source: Tourism Economics

Pennsylvania Wilds Visitor Economy Total Impacts

Amounts in \$ millions, number of jobs, and 2023 percent % change

	Total Business Sales	Employment	Labor Income	State & Local Taxes	Federal Taxes
Pennsylvania Wilds	\$3,149.8	20,844	\$778.1	\$178.8	\$185.7
Percent Change	4.1%	2.6%	5.5%	3.9%	5.2%
Cameron	\$20.7	138	\$3.0	\$1.0	\$0.9
Clarion	\$227.9	1,849	\$63.1	\$13.1	\$14.1
Clearfield	\$522.1	2,972	\$118.3	\$29.4	\$29.4
Clinton	\$256.1	1,690	\$58.6	\$14.2	\$14.7
Elk	\$152.9	1,044	\$31.6	\$8.1	\$7.9
Forest	\$58.7	298	\$9.9	\$3.2	\$3.0
Jefferson	\$195.6	1,386	\$47.5	\$10.3	\$10.6
Lycoming	\$712.4	4,608	\$192.9	\$41.1	\$44.3
McKean	\$283.4	1,887	\$72.1	\$16.3	\$17.1
Potter	\$78.0	455	\$13.7	\$4.2	\$3.9
Tioga	\$349.3	2,615	\$97.4	\$21.6	\$23.0
Warren	\$292.7	1,903	\$69.9	\$16.1	\$16.9

Source: Tourism Economics

Pennsylvania Wilds Visitor Economy Timeline

Employment directly supported by visitor spending grew 2.7% in 2023, an increase of 357 jobs.

Pennsylvania Wilds Spending Timeline

Amounts in \$ millions, 2023 percent % change

	2019	2020	2021	2022	2023
Pennsylvania Wilds	\$1,834.3	\$1,322.1	\$1,682.6	\$1,903.3	\$2,016.0
Percent Change	2.0%	-27.9%	27.3%	13.1%	5.9%
Cameron	\$10.4	\$8.8	\$11.0	\$12.6	\$13.2
Clarion	\$124.9	\$94.1	\$110.0	\$134.5	\$142.3
Clearfield	\$291.8	\$213.8	\$279.8	\$323.2	\$340.7
Clinton	\$158.9	\$104.6	\$139.5	\$156.1	\$166.0
Elk	\$81.7	\$62.3	\$79.1	\$89.1	\$94.8
Forest	\$25.9	\$29.8	\$35.1	\$38.7	\$40.9
Jefferson	\$120.2	\$82.0	\$101.3	\$110.3	\$119.4
Lycoming	\$404.9	\$282.4	\$368.7	\$415.9	\$445.8
McKean	\$181.3	\$121.3	\$155.5	\$172.6	\$183.9
Potter	\$39.0	\$39.0	\$46.7	\$50.6	\$51.1
Tioga	\$201.9	\$159.2	\$193.6	\$219.2	\$227.0
Warren	\$193.5	\$124.9	\$162.2	\$180.5	\$190.8

Source: Tourism Economics

Pennsylvania Wilds Direct Employment Timeline

Amounts in \$ millions, 2023 percent % change

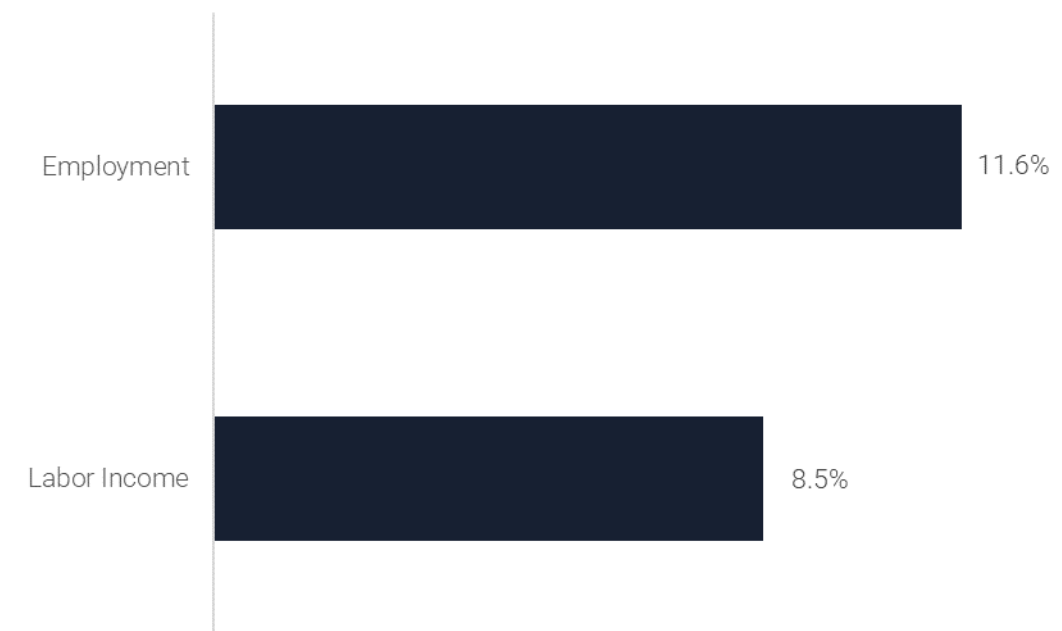
	2019	2020	2021	2022	2023
Pennsylvania Wilds	13,268	11,118	12,434	13,071	13,428
Percent Change	1.9%	-16.2%	11.8%	5.1%	2.7%
Cameron	80	75	80	84	85
Clarion	1,157	981	1,095	1,170	1,201
Clearfield	1,897	1,567	1,744	1,813	1,852
Clinton	1,128	929	1,010	1,018	1,061
Elk	622	535	601	632	657
Forest	142	148	170	182	198
Jefferson	846	700	772	803	826
Lycoming	3,032	2,430	2,723	2,877	2,982
McKean	1,216	1,026	1,169	1,238	1,248
Potter	257	254	293	300	294
Tioga	1,680	1,449	1,623	1,749	1,788
Warren	1,212	1,023	1,152	1,206	1,237

Source: Tourism Economics

Total visitor supported employment and labor income, including indirect, and induced impacts, comprised 11.6% and 8.5% of the total jobs and wages earned in the Pennsylvania Wilds Region.

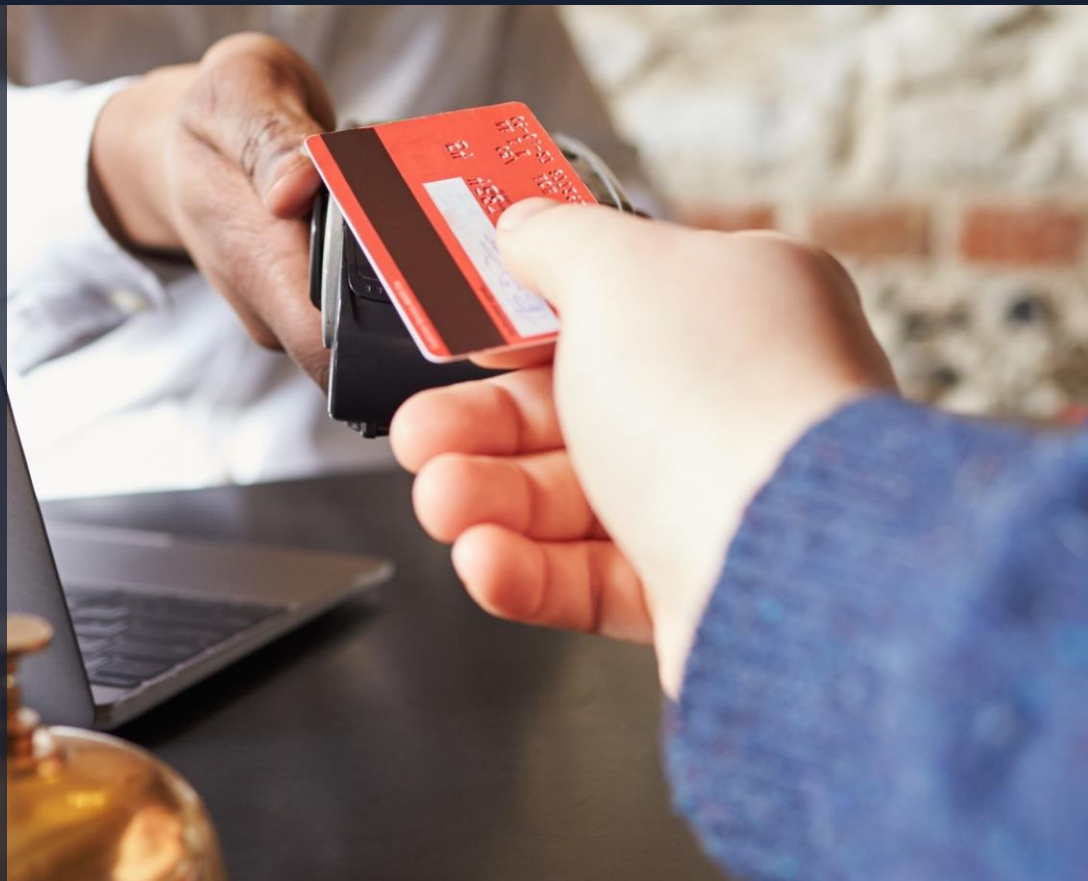
Pennsylvania Wilds Tourism Share of Region Economy (2023)

Visitor supported share of employment and payroll (Total Impacts)



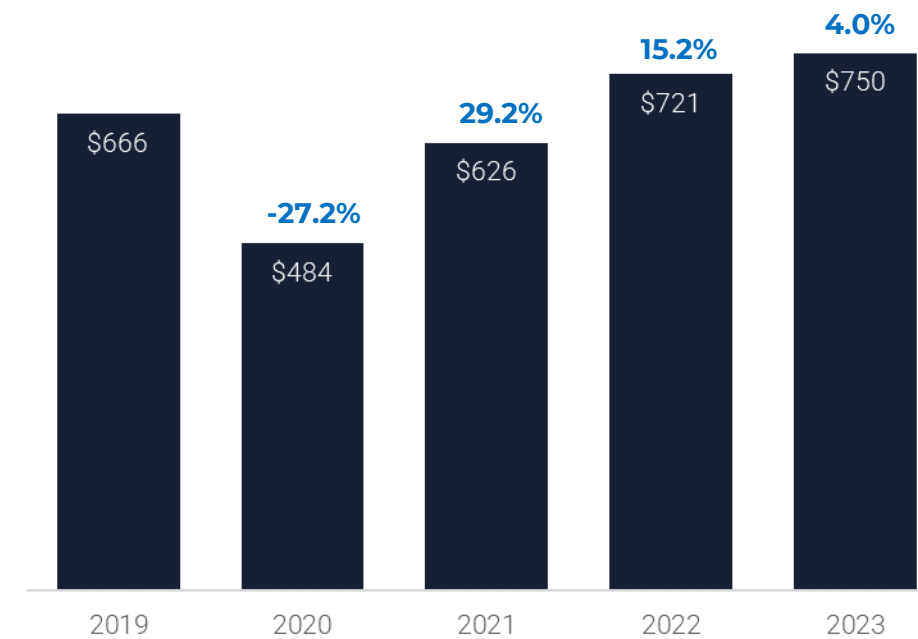
Source: BLS, Tourism Economics

Visitors to the Valleys of the Susquehanna spent **\$750 million** in 2023.



Valleys of the Susquehanna Visitor Spending

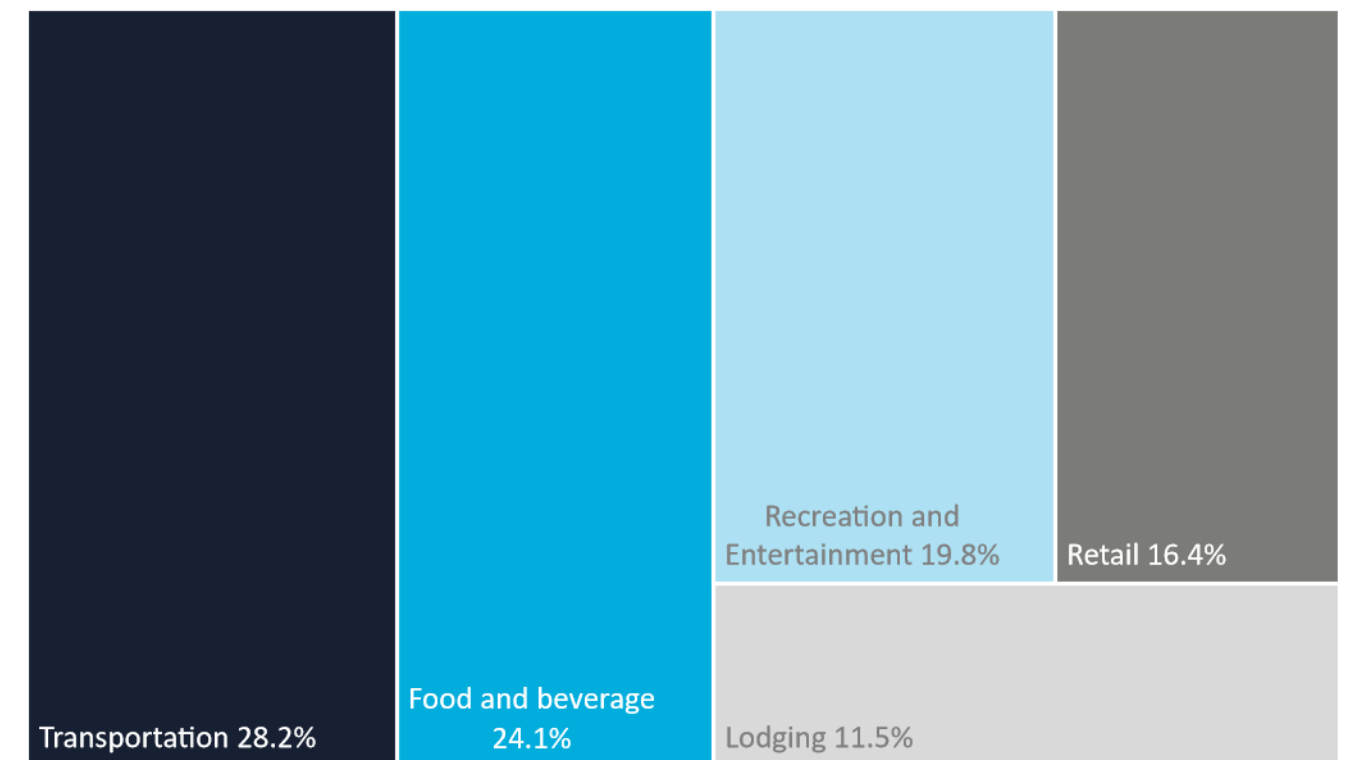
Amounts in \$ millions



Source: Tourism Economics

Visitor Spending by Category

Percent of total



Source: Tourism Economics

Valleys of the Susquehanna Visitor Spending

Valleys of the Susquehanna Visitor Spending

Amounts in \$ millions

	Lodging	Food and beverage	Recreation	Retail	Transportation	Total
Valleys of the Susquehanna	\$86.4	\$180.5	\$148.2	\$123.2	\$211.2	\$749.5
Percent Change	3.1%	5.0%	9.0%	2.9%	0.9%	4.0%
Columbia	\$21.5	\$45.0	\$32.4	\$29.7	\$52.9	\$181.4
Montour	\$17.0	\$26.6	\$23.7	\$19.0	\$28.5	\$114.8
Northumberland	\$4.7	\$28.8	\$42.0	\$18.4	\$48.5	\$142.4
Snyder	\$14.1	\$30.5	\$23.5	\$22.5	\$31.1	\$121.7
Union	\$29.2	\$49.6	\$26.5	\$33.7	\$50.2	\$189.2

Source: Tourism Economics

Note: Lodging spending is calculated as an industry and includes the value of short-term rentals and second homes. Transportation includes both air and local transportation.

Valleys of the Susquehanna Economic Impacts

Valleys of the Susquehanna Visitor Economy Direct Impacts

Amounts in \$ millions, number of jobs, and 2023 percent % change

	Visitor Spend	Employment	Labor Income	State & Local Taxes	Federal Taxes
Valleys of the Susquehanna	\$749.5	5,366	\$165.7	\$35.8	\$39.8
Percent Change	4.0%	2.8%	4.3%	3.0%	3.7%
Columbia	\$181.4	1,304	\$37.8	\$8.6	\$9.3
Montour	\$114.8	912	\$27.5	\$5.7	\$6.4
Northumberland	\$142.4	1,120	\$38.7	\$7.1	\$8.8
Snyder	\$121.7	814	\$21.9	\$5.4	\$5.6
Union	\$189.2	1,217	\$39.8	\$9.0	\$9.6

Source: Tourism Economics

Valleys of the Susquehanna Visitor Economy Total Impacts

Amounts in \$ millions, number of jobs, and 2023 percent % change

	Total Business Sales	Employment	Labor Income	State & Local Taxes	Federal Taxes
Valleys of the Susquehanna	\$1,238.8	8,614	\$317.7	\$68.4	\$72.0
Percent Change	4.2%	2.6%	4.1%	3.3%	4.5%
Columbia	\$294.4	2,063	\$72.8	\$16.6	\$17.1
Montour	\$201.0	1,340	\$54.6	\$10.8	\$11.4
Northumberland	\$248.5	1,991	\$68.9	\$13.8	\$15.9
Snyder	\$192.3	1,288	\$42.2	\$10.3	\$10.2
Union	\$302.6	1,931	\$79.1	\$17.0	\$17.4

Source: Tourism Economics



Valleys of the Susquehanna Visitor Economy Timeline

Employment directly supported by visitor spending grew 2.8% in 2023, an increase of 147 jobs.

Valleys of the Susquehanna Direct Spending Timeline

Amounts in \$ millions, 2023 percent % change

	2019	2020	2021	2022	2023
Valleys of the Susquehanna	\$665.7	\$484.3	\$625.5	\$720.6	\$749.5
Percent Change	-1.1%	-27.2%	29.2%	15.2%	4.0%
Columbia	\$169.3	\$126.1	\$162.8	\$185.7	\$181.4
Montour	\$94.6	\$77.8	\$101.5	\$107.6	\$114.8
Northumberland	\$140.2	\$86.6	\$111.3	\$136.0	\$142.4
Snyder	\$109.9	\$81.1	\$104.5	\$115.7	\$121.7
Union	\$151.8	\$112.8	\$145.4	\$175.6	\$189.2

Source: Tourism Economics

Valleys of the Susquehanna Direct Employment Timeline

Amounts in \$ millions, 2023 percent % change

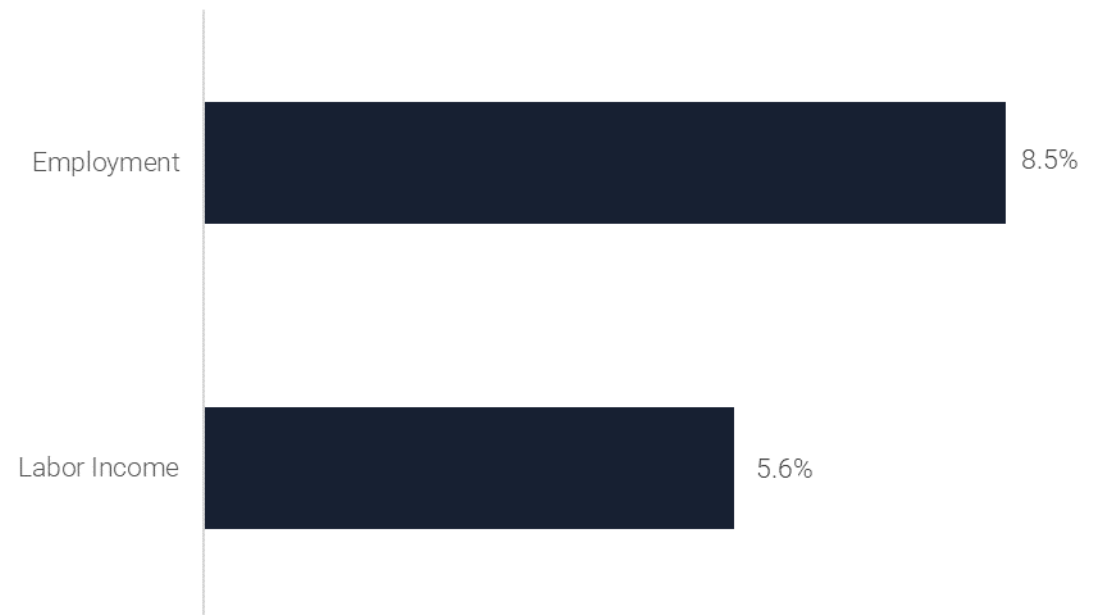
	2019	2020	2021	2022	2023
Valleys of the Susquehanna	5,614	4,443	4,915	5,219	5,366
Percent Change	1.0%	-20.9%	10.6%	6.2%	2.8%
Columbia	1,364	1,079	1,212	1,320	1,304
Montour	973	808	844	874	912
Northumberland	1,152	849	978	1,066	1,120
Snyder	811	672	760	810	814
Union	1,314	1,035	1,120	1,150	1,217

Source: Tourism Economics

Total visitor supported employment and labor income, including indirect, and induced impacts, comprised 8.5% and 5.6% of the total jobs and wages earned in Valleys of the Susquehanna Region.

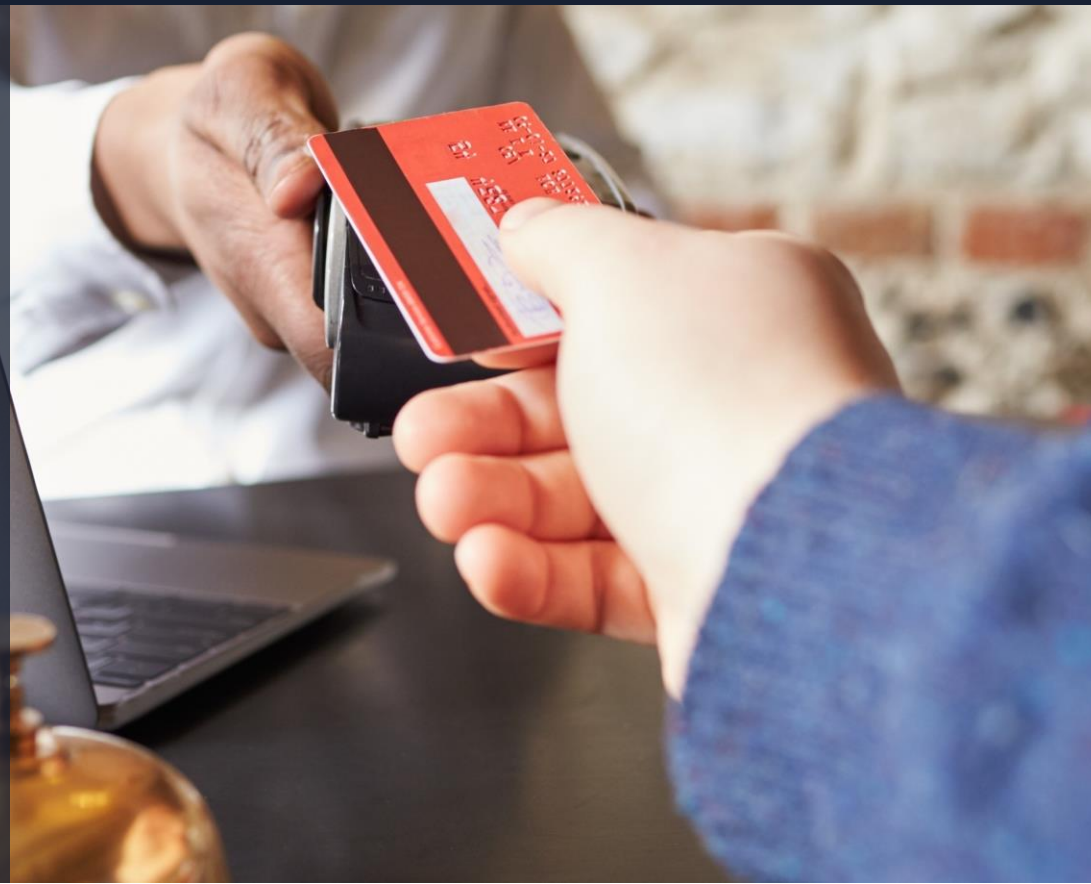
Valleys of the Susquehanna Tourism Share of Region Economy (2023)

Visitor supported share of employment and payroll (Total Impacts)



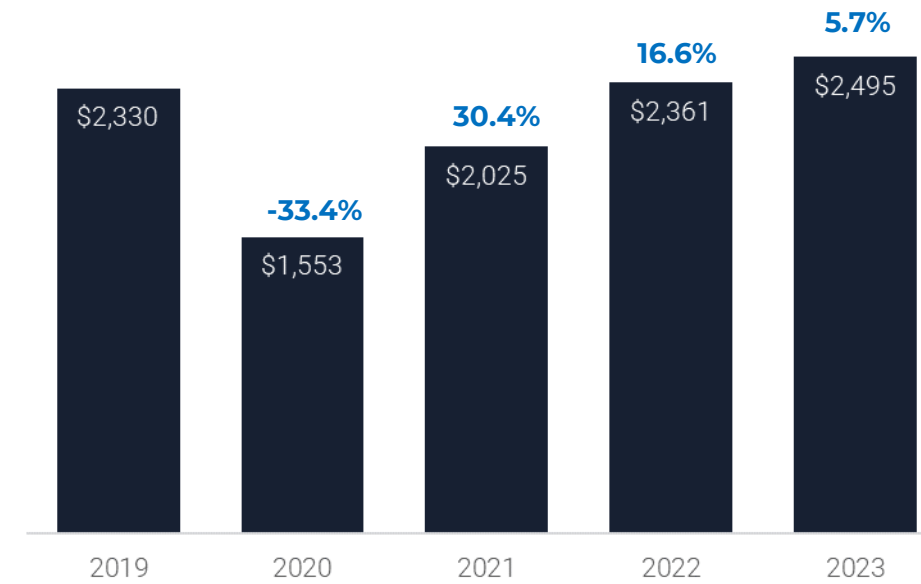
Source: BLS, Tourism Economics

Visitors to the Alleghenies and her Valleys spent **\$2.5 billion** in 2023.



Alleghenies and her Valleys Visitor Spending

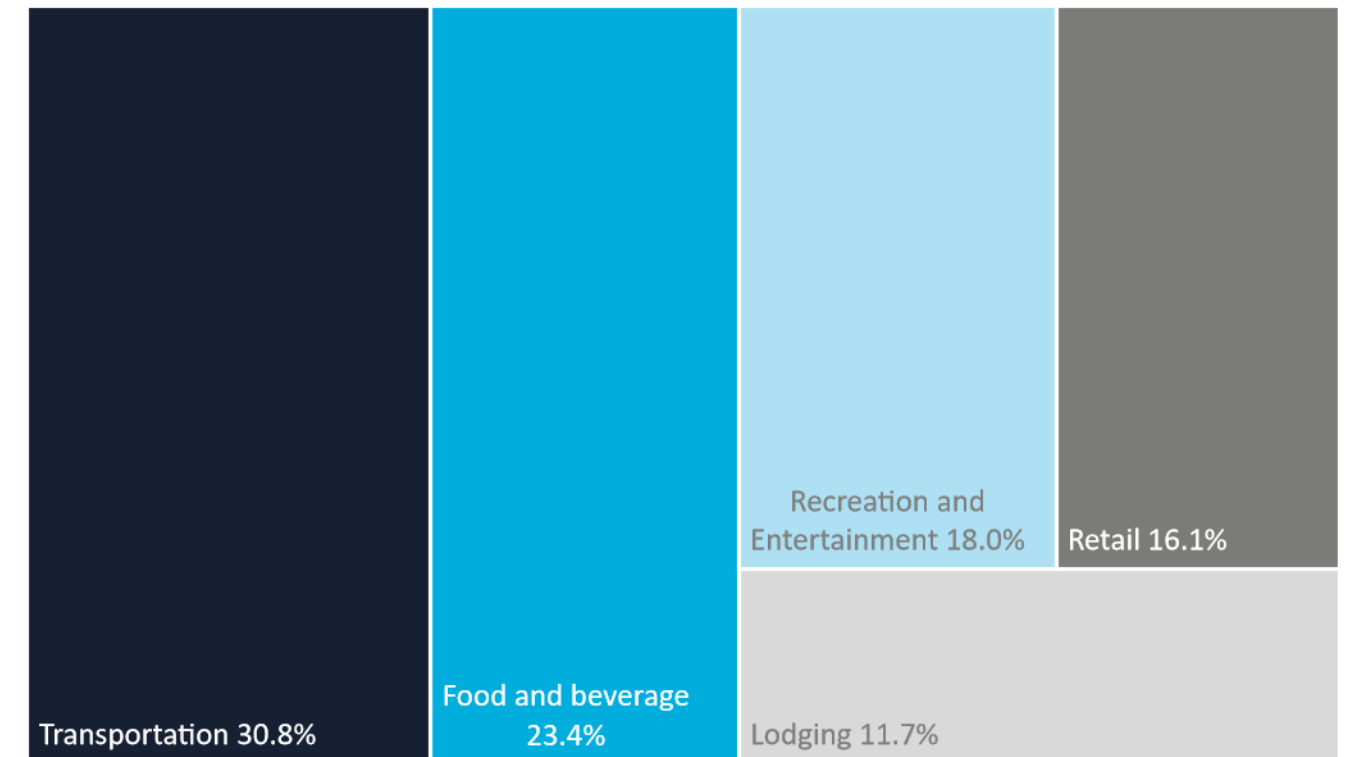
Amounts in \$ millions



Source: Tourism Economics

Visitor Spending by Category

Percent of total



Source: Tourism Economics

Alleghenies and her Valleys Visitor Spending

Alleghenies and her Valleys Visitor Spending

Amounts in \$ millions

	Lodging	Food and beverage	Recreation	Retail	Transportation	Total
Alleghenies and her Valleys	\$293.1	\$584.1	\$448.6	\$400.8	\$767.9	\$2,494.6
Percent Change	5.2%	7.3%	11.2%	4.5%	2.3%	5.7%
Bedford	\$39.4	\$63.2	\$52.7	\$43.0	\$93.0	\$291.4
Blair	\$40.3	\$88.7	\$63.4	\$70.1	\$131.3	\$393.8
Cambria	\$22.4	\$68.3	\$58.8	\$45.1	\$106.2	\$300.8
Centre	\$140.1	\$215.7	\$155.0	\$145.9	\$224.7	\$881.3
Fulton	\$2.3	\$6.4	\$5.0	\$5.2	\$9.4	\$28.3
Huntingdon	\$17.4	\$48.5	\$45.3	\$31.9	\$69.2	\$212.3
Juniata	\$2.2	\$10.4	\$7.9	\$7.4	\$16.7	\$44.6
Mifflin	\$8.2	\$22.8	\$14.5	\$13.9	\$28.9	\$88.4
Schuylkill	\$20.8	\$60.2	\$45.8	\$38.2	\$88.7	\$253.7

Source: Tourism Economics

Note: Lodging spending is calculated as an industry and includes the value of short-term rentals and second homes. Transportation includes both air and local transportation.

Alleghenies and her Valleys Economic Impacts

Alleghenies and her Valleys Visitor Economy Direct Impacts

Amounts in \$ millions, number of jobs, and 2023 percent % change

	Visitor Spend	Employment	Labor Income	State & Local Taxes	Federal Taxes
Alleghenies and her Valleys	\$2,494.6	16,383	\$563.8	\$121.4	\$133.9
Percent Change	5.7%	4.7%	6.1%	3.7%	5.1%
Bedford	\$291.4	1,999	\$59.1	\$13.4	\$14.7
Blair	\$393.8	2,865	\$99.7	\$19.7	\$22.8
Cambria	\$300.8	2,073	\$74.5	\$15.0	\$17.1
Centre	\$881.3	5,140	\$182.3	\$42.8	\$44.6
Fulton	\$28.3	176	\$4.9	\$1.2	\$1.3
Huntingdon	\$212.3	1,695	\$58.6	\$10.7	\$13.0
Juniata	\$44.6	256	\$6.8	\$1.9	\$1.9
Mifflin	\$88.4	729	\$21.2	\$4.4	\$4.9
Schuylkill	\$253.7	1,450	\$56.8	\$12.2	\$13.6

Source: Tourism Economics

Alleghenies and her Valleys Visitor Economy Total Impacts

Amounts in \$ millions, number of jobs, and 2023 percent % change

	Total Business Sales	Employment	Labor Income	State & Local Taxes	Federal Taxes
Alleghenies and her Valleys	\$3,975.6	25,922	\$1,050.9	\$229.1	\$241.0
Percent Change	4.6%	4.1%	5.9%	3.8%	5.4%
Bedford	\$443.1	2,909	\$113.1	\$26.0	\$26.9
Blair	\$646.8	4,506	\$180.1	\$37.3	\$40.7
Cambria	\$497.5	3,444	\$135.7	\$28.8	\$30.9
Centre	\$1,364.4	7,875	\$362.2	\$78.6	\$79.8
Fulton	\$47.0	311	\$8.8	\$2.3	\$2.3
Huntingdon	\$326.5	2,495	\$99.8	\$20.5	\$23.2
Juniata	\$72.2	495	\$12.4	\$3.6	\$3.5
Mifflin	\$154.1	1,244	\$40.3	\$8.4	\$8.9
Schuylkill	\$423.9	2,640	\$98.5	\$23.5	\$24.8

Source: Tourism Economics



Alleghenies and her Valleys Visitor Economy Timeline

Employment directly supported by visitor spending grew 4.7% in 2023, an increase of 739 jobs.

Alleghenies and her Valleys Direct Spending Timeline

Amounts in \$ millions, 2023 percent % change

	2019	2020	2021	2022	2023
Alleghenies and her Valleys	\$2,330.1	\$1,552.7	\$2,025.0	\$2,360.9	\$2,494.6
Percent Change	1.2%	-33.4%	30.4%	16.6%	5.7%
Bedford	\$303.8	\$211.4	\$258.6	\$294.1	\$291.4
Blair	\$371.7	\$258.5	\$326.4	\$371.0	\$393.8
Cambria	\$309.0	\$205.4	\$251.1	\$288.8	\$300.8
Centre	\$813.2	\$459.5	\$660.2	\$797.9	\$881.3
Fulton	\$25.9	\$17.2	\$22.1	\$26.3	\$28.3
Huntingdon	\$177.5	\$143.3	\$175.6	\$197.5	\$212.3
Juniata	\$35.8	\$28.0	\$36.5	\$42.7	\$44.6
Mifflin	\$72.4	\$54.6	\$71.7	\$85.4	\$88.4
Schuylkill	\$220.7	\$174.8	\$222.9	\$257.1	\$253.7

Source: Tourism Economics

Alleghenies and her Valleys Direct Employment Timeline

Amounts in \$ millions, 2023 percent % change

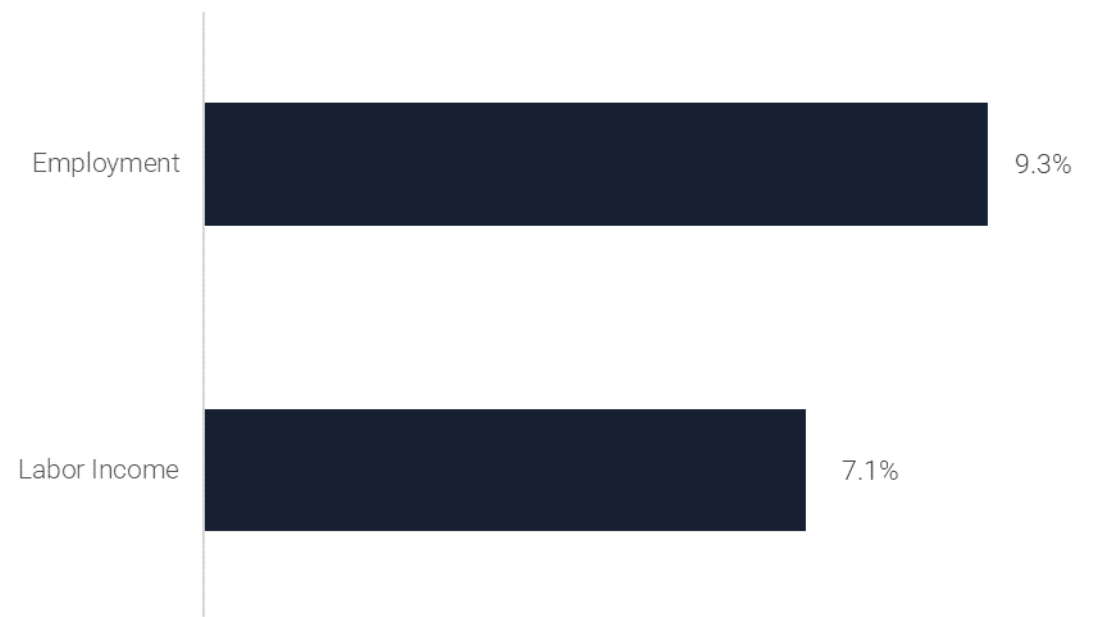
	2019	2020	2021	2022	2023
Alleghenies and her Valleys	16,192	12,902	14,558	15,644	16,383
Percent Change	1.5%	-20.3%	12.8%	7.5%	4.7%
Bedford	2,172	1,639	1,839	2,001	1,999
Blair	2,841	2,298	2,639	2,761	2,865
Cambria	2,090	1,716	1,922	2,023	2,073
Centre	5,219	3,870	4,308	4,689	5,140
Fulton	177	135	150	164	176
Huntingdon	1,470	1,300	1,476	1,596	1,695
Juniata	230	203	232	249	256
Mifflin	688	585	661	714	729
Schuylkill	1,304	1,157	1,329	1,446	1,450

Source: Tourism Economics

Total visitor supported employment and labor income, including indirect, and induced impacts, comprised 9.3% and 7.1% of the total jobs and wages earned in the Alleghenies and her Valleys.

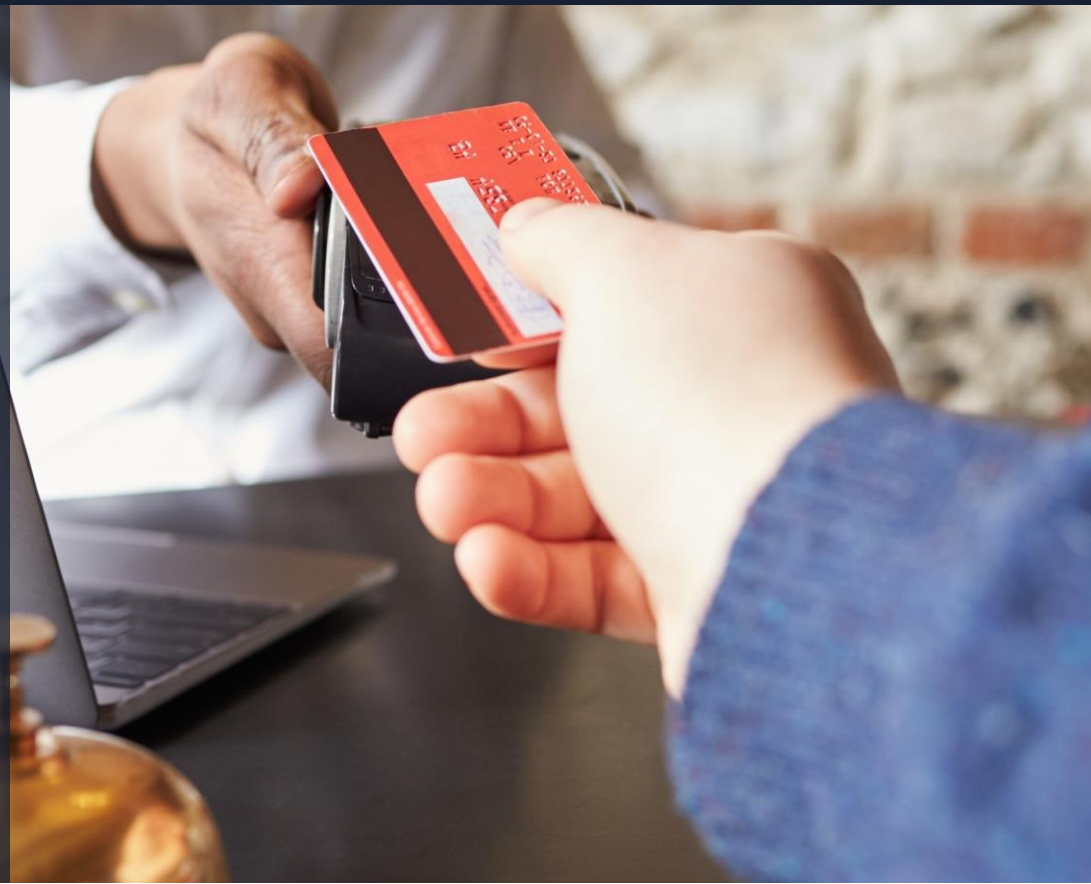
Alleghenies and her Valleys Tourism Share of Region Economy (2023)

Visitor supported share of employment and payroll (Total Impacts)



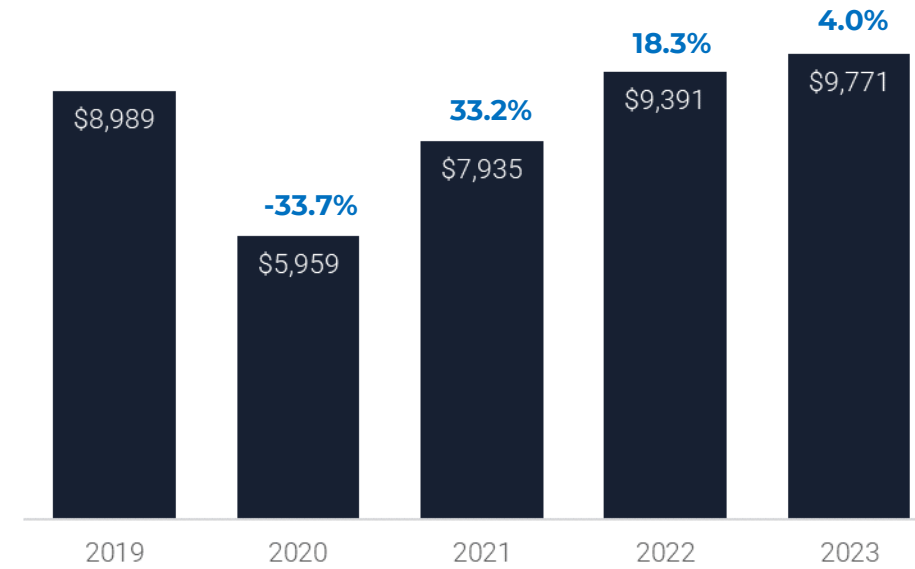
Source: BLS, Tourism Economics

Visitors to Dutch Country Roads spent **\$9.8 billion** in 2023.



Dutch Country Roads Visitor Spending

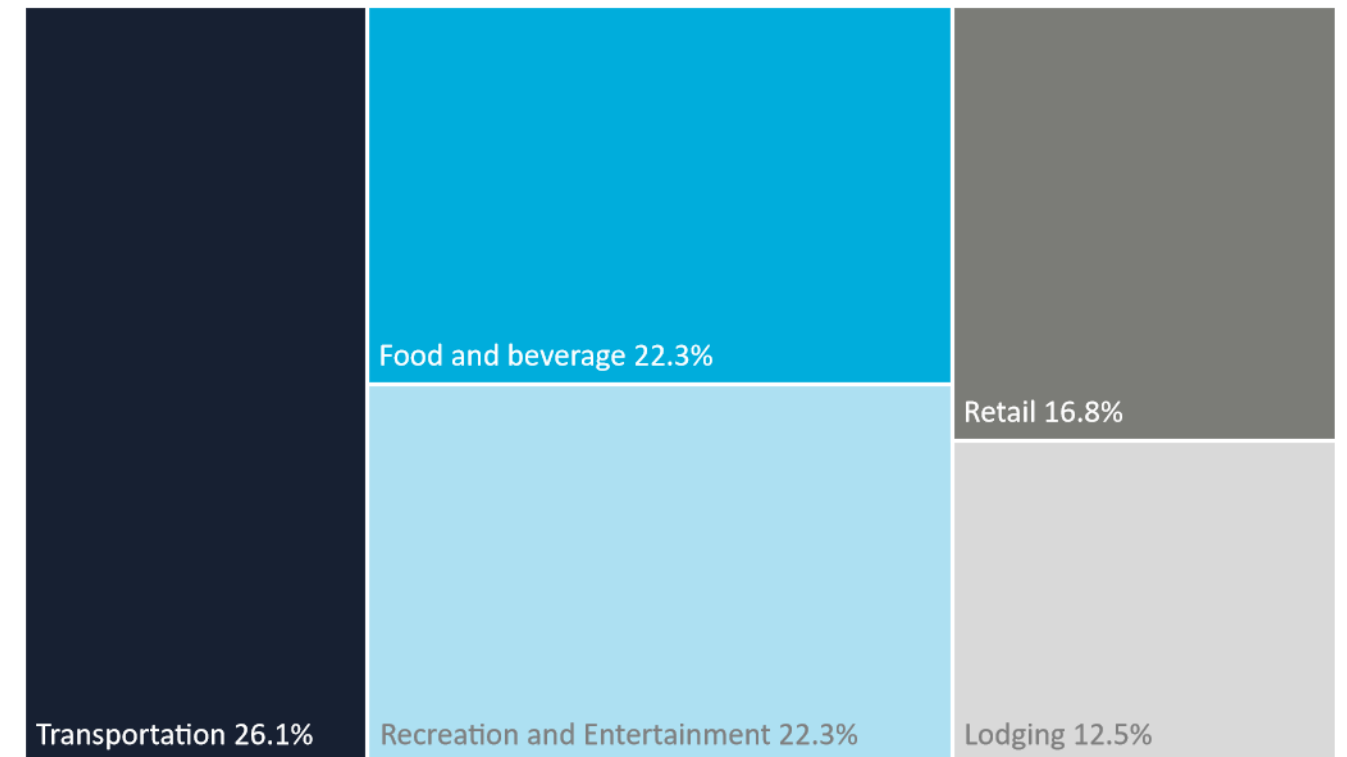
Amounts in \$ millions



Source: Tourism Economics

Visitor Spending by Category

Percent of total



Source: Tourism Economics

Dutch Country Roads Visitor Spending

Dutch Country Roads Visitor Spending

Amounts in \$ millions

	Lodging	Food and beverage	Recreation	Retail	Transportation	Total
Dutch Country Roads	\$1,218.1	\$2,177.9	\$2,175.2	\$1,645.3	\$2,554.3	\$9,770.9
Percent Change	2.6%	5.1%	9.8%	2.1%	0.6%	4.0%
Adams	\$91.9	\$166.1	\$203.0	\$128.3	\$196.7	\$786.0
Berks	\$87.6	\$220.1	\$189.9	\$170.6	\$296.5	\$964.7
Cumberland	\$117.5	\$234.2	\$198.4	\$158.7	\$246.7	\$955.6
Dauphin	\$361.5	\$514.2	\$674.4	\$381.9	\$628.9	\$2,560.8
Franklin	\$42.5	\$96.8	\$82.3	\$62.4	\$107.1	\$391.2
Lancaster	\$371.1	\$587.1	\$519.1	\$490.7	\$614.9	\$2,583.0
Lebanon	\$29.5	\$72.1	\$54.4	\$50.9	\$89.3	\$296.2
Perry	\$2.1	\$14.0	\$7.5	\$9.7	\$22.7	\$56.0
York	\$114.4	\$273.3	\$246.0	\$192.0	\$351.6	\$1,177.3

Source: Tourism Economics

Note: Lodging spending is calculated as an industry and includes the value of short-term rentals and second homes. Transportation includes both air and local transportation.

Dutch Country Roads Economic Impacts

Dutch Country Roads Visitor Economy Direct Impacts

Amounts in \$ millions, number of jobs, and 2023 percent % change

	Visitor Spend	Employment	Labor Income	State & Local Taxes	Federal Taxes
Dutch Country Roads	\$9,770.9	67,072	\$2,549.3	\$505.6	\$577.3
Percent Change	4.0%	3.4%	5.4%	2.9%	4.4%
Adams	\$786.0	5,067	\$175.2	\$38.6	\$41.7
Berks	\$964.7	6,480	\$232.5	\$48.2	\$54.5
Cumberland	\$955.6	6,474	\$239.0	\$46.7	\$55.2
Dauphin	\$2,560.8	18,979	\$816.1	\$145.8	\$173.1
Franklin	\$391.2	2,587	\$85.1	\$18.8	\$20.5
Lancaster	\$2,583.0	17,077	\$615.2	\$130.0	\$144.1
Lebanon	\$296.2	1,820	\$67.6	\$14.7	\$16.1
Perry	\$56.0	391	\$9.5	\$2.3	\$2.6
York	\$1,177.3	8,197	\$309.1	\$60.5	\$69.7

Source: Tourism Economics

Dutch Country Roads Visitor Economy Total Impacts

Amounts in \$ millions, number of jobs, and 2023 percent % change

	Total Business Sales	Employment	Labor Income	State & Local Taxes	Federal Taxes
Dutch Country Roads	\$15,980.1	103,165	\$4,756.2	\$956.6	\$1,037.4
Percent Change	3.3%	2.9%	4.7%	3.0%	4.7%
Adams	\$1,198.9	7,685	\$324.9	\$72.3	\$74.8
Berks	\$1,680.8	11,022	\$450.5	\$92.6	\$99.1
Cumberland	\$1,592.3	9,921	\$451.9	\$88.6	\$97.9
Dauphin	\$4,141.0	27,068	\$1,508.6	\$276.3	\$311.3
Franklin	\$643.7	4,267	\$159.1	\$35.6	\$36.9
Lancaster	\$4,127.2	25,987	\$1,134.4	\$243.4	\$258.1
Lebanon	\$497.9	3,155	\$127.9	\$28.0	\$29.2
Perry	\$92.3	770	\$18.0	\$4.6	\$4.7
York	\$2,006.0	13,289	\$581.1	\$115.0	\$125.4

Source: Tourism Economics



Dutch Country Roads Visitor Economy Timeline

Employment directly supported by visitor spending grew 3.4% in 2023, an increase of 2,196 jobs.

Dutch Country Roads Direct Spending Timeline

Amounts in \$ millions, 2023 percent % change

	2019	2020	2021	2022	2023
Dutch Country Roads	\$8,988.8	\$5,959.2	\$7,935.4	\$9,390.6	\$9,770.9
Percent Change	2.2%	-33.7%	33.2%	18.3%	4.0%
Adams	\$745.0	\$488.9	\$630.4	\$736.3	\$786.0
Berks	\$942.6	\$662.9	\$854.3	\$983.2	\$964.7
Cumberland	\$888.1	\$618.7	\$775.0	\$887.3	\$955.6
Dauphin	\$2,535.8	\$1,479.0	\$2,005.9	\$2,461.0	\$2,560.8
Franklin	\$334.8	\$251.3	\$325.1	\$378.2	\$391.2
Lancaster	\$2,206.1	\$1,497.7	\$2,124.7	\$2,472.4	\$2,583.0
Lebanon	\$251.2	\$185.4	\$258.7	\$296.4	\$296.2
Perry	\$52.2	\$36.7	\$47.2	\$57.3	\$56.0
York	\$1,033.0	\$738.5	\$914.0	\$1,118.4	\$1,177.3

Source: Tourism Economics

Dutch Country Roads Direct Employment Timeline

Amounts in \$ millions, 2023 percent % change

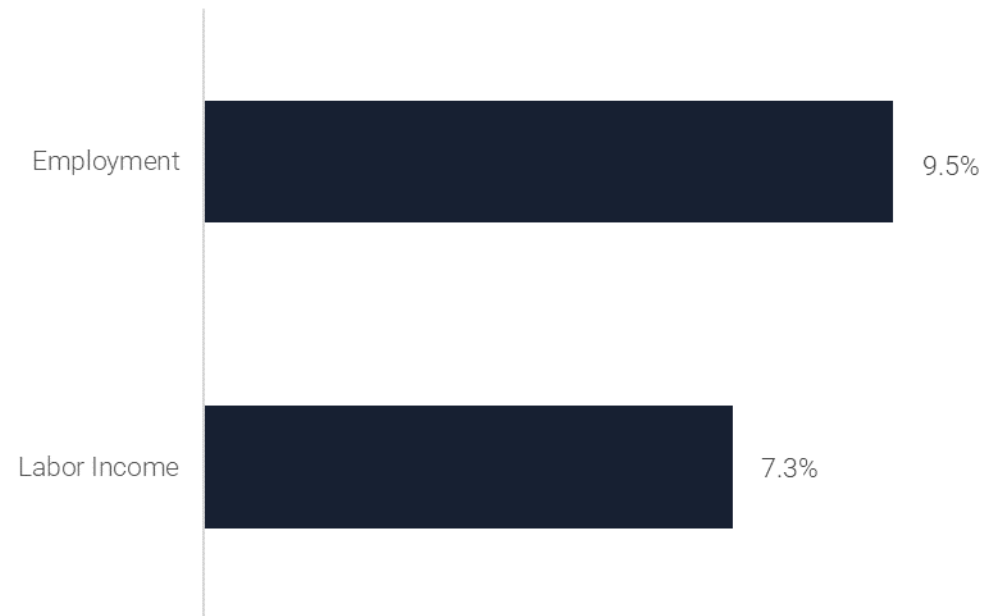
	2019	2020	2021	2022	2023
Dutch Country Roads	69,005	52,863	59,574	64,876	67,072
Percent Change	1.8%	-23.4%	12.7%	8.9%	3.4%
Adams	5,392	4,143	4,570	4,884	5,067
Berks	7,165	5,469	5,970	6,550	6,480
Cumberland	6,592	5,116	5,719	6,103	6,474
Dauphin	19,818	14,578	16,445	18,101	18,979
Franklin	2,632	2,148	2,398	2,565	2,587
Lancaster	17,145	13,151	15,117	16,480	17,077
Lebanon	1,807	1,441	1,686	1,824	1,820
Perry	346	304	360	388	391
York	8,108	6,512	7,307	7,980	8,197

Source: Tourism Economics

Total visitor supported employment and labor income, including indirect, and induced impacts, comprised 9.5% and 7.3% of the total jobs and wages earned in the Dutch Country Roads Region.

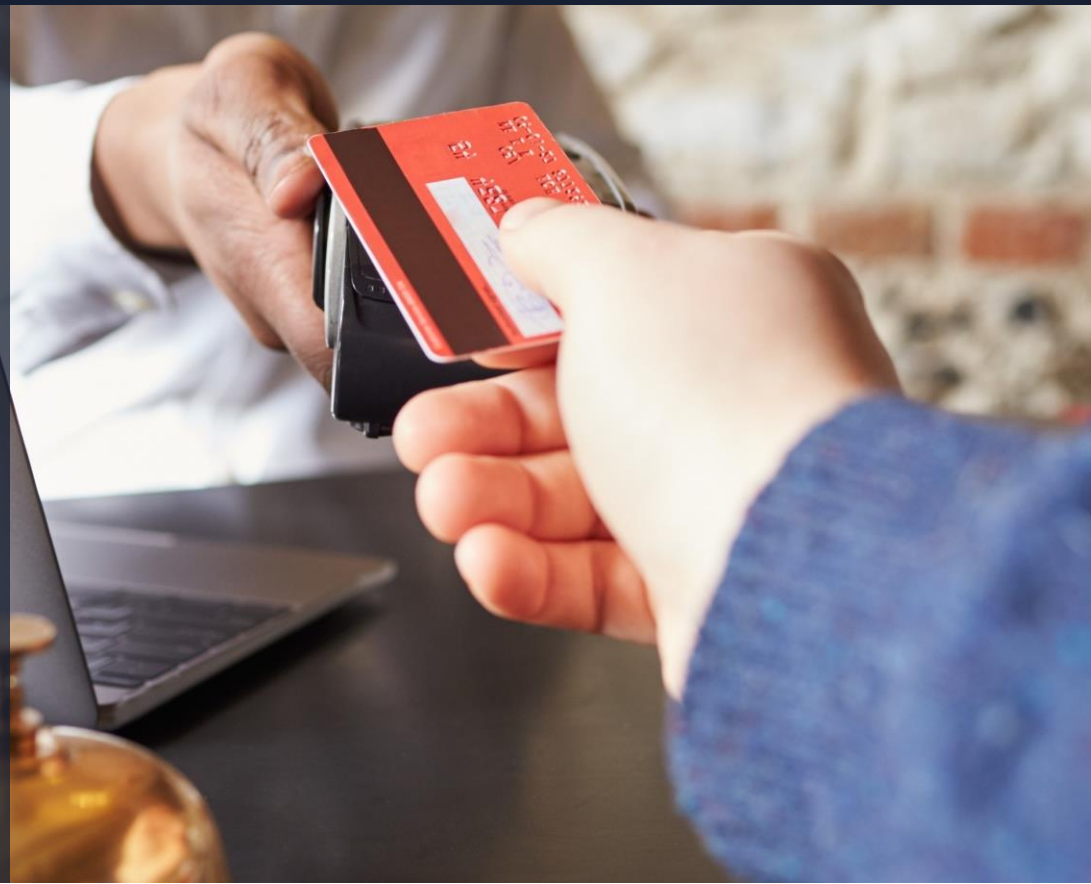
Dutch Country Roads Tourism Share of Region Economy (2023)

Visitor supported share of employment and payroll (Total Impacts)



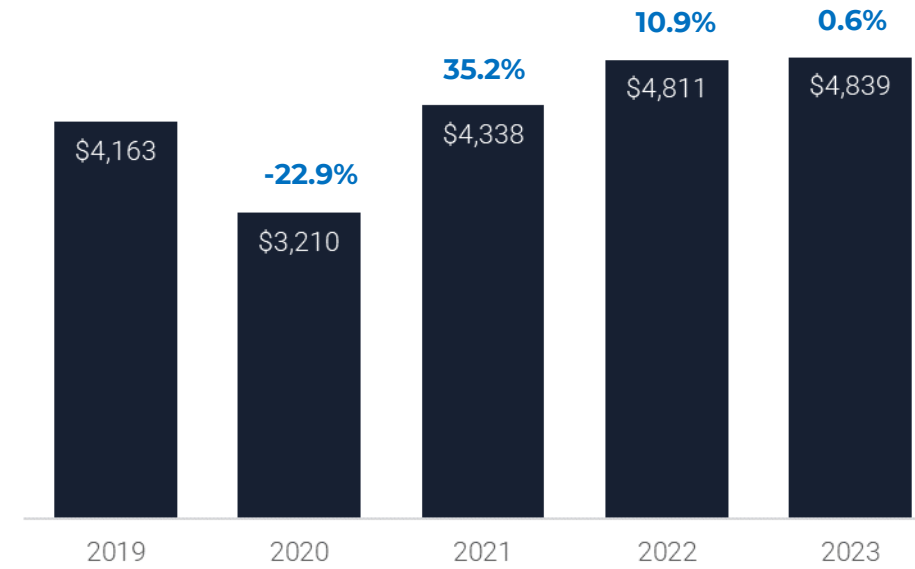
Source: BLS, Tourism Economics

Visitors to the Pocono Mountains spent **\$4.8 billion** in 2023.



Pocono Mountains Visitor Spending

Amounts in \$ millions



Source: Tourism Economics

Pocono Mountains Visitor Spending

Pocono Mountains Visitor Spending

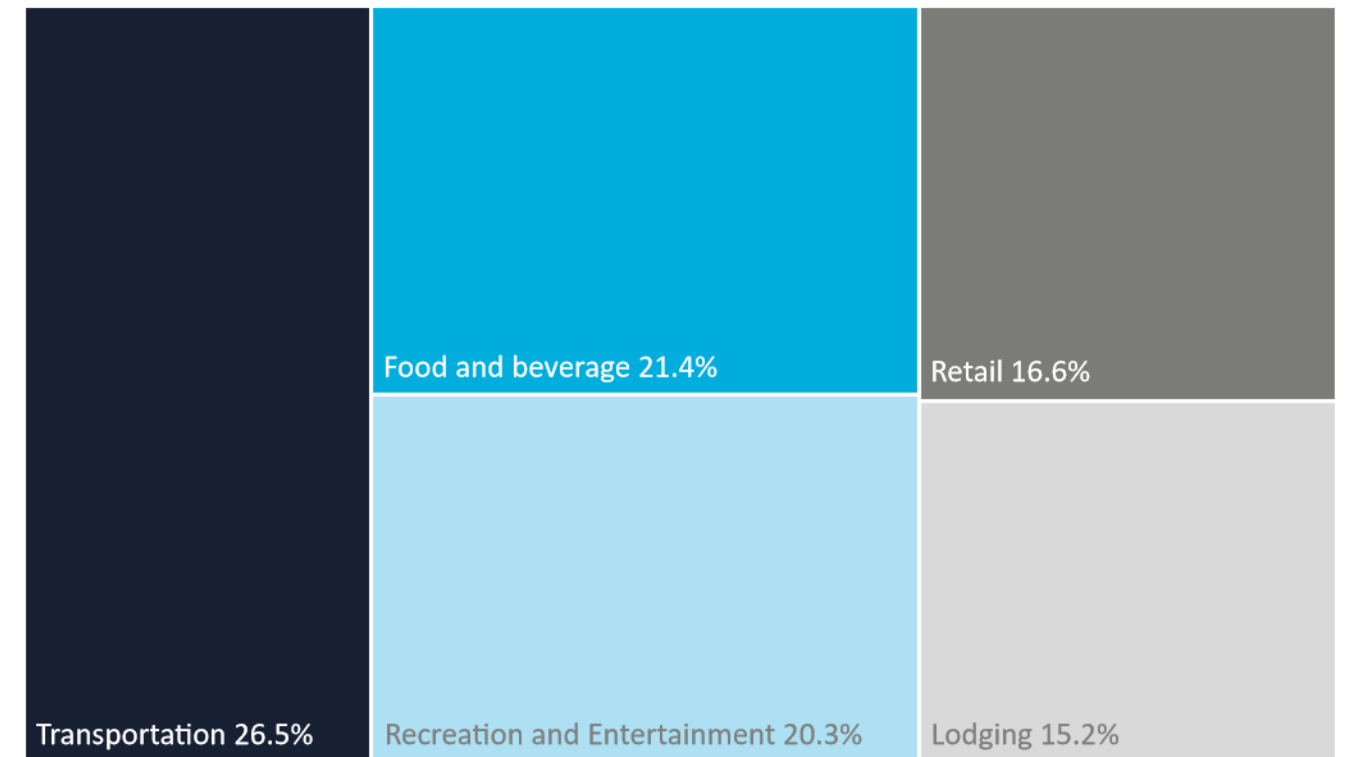
Amounts in \$ millions

	Lodging	Food and beverage	Recreation	Retail	Transportation	Total
Pocono Mountains	\$737.2	\$1,037.6	\$980.5	\$802.4	\$1,281.2	\$4,839.0
Percent Change	-0.7%	2.4%	4.6%	-1.4%	-1.8%	0.6%
Carbon	\$82.1	\$120.8	\$133.4	\$86.3	\$164.3	\$586.9
Monroe	\$495.0	\$602.3	\$575.3	\$507.5	\$678.4	\$2,858.4
Pike	\$89.1	\$179.2	\$145.4	\$117.8	\$243.2	\$774.7
Wayne	\$71.1	\$135.3	\$126.4	\$90.8	\$195.3	\$618.9

Source: Tourism Economics

Visitor Spending by Category

Percent of total



Source: Tourism Economics

Note: Lodging spending is calculated as an industry and includes the value of short-term rentals and second homes. Transportation includes both air and local transportation.

Pocono Mountains Economic Impacts

Pocono Mountains Visitor Economy Direct Impacts

Amounts in \$ millions, number of jobs, and 2023 percent % change

	Visitor Spend	Employment	Labor Income	State & Local Taxes	Federal Taxes
Pocono Mountains	\$4,839.0	26,100	\$1,050.1	\$232.6	\$254.3
Percent Change	0.6%	2.0%	1.9%	-0.1%	1.0%
Carbon	\$586.9	3,191	\$100.6	\$26.5	\$26.8
Monroe	\$2,858.4	13,701	\$591.9	\$136.8	\$145.7
Pike	\$774.7	5,665	\$221.3	\$40.1	\$48.9
Wayne	\$618.9	3,542	\$136.2	\$29.2	\$33.0

Source: Tourism Economics

Pocono Mountains Visitor Economy Total Impacts

Amounts in \$ millions, number of jobs, and 2023 percent % change

	Total Business Sales	Employment	Labor Income	State & Local Taxes	Federal Taxes
Pocono Mountains	\$7,157.4	38,075	\$1,958.9	\$444.4	\$462.7
Percent Change	-0.8%	1.6%	1.9%	1.0%	2.4%
Carbon	\$852.7	4,735	\$184.2	\$49.8	\$48.7
Monroe	\$4,198.0	20,185	\$1,114.6	\$258.6	\$264.2
Pike	\$1,198.0	7,962	\$421.4	\$78.8	\$89.4
Wayne	\$908.7	5,192	\$238.7	\$57.1	\$60.4

Source: Tourism Economics



Pocono Mountains Visitor Economy Timeline

Employment directly supported by visitor spending grew 2.0% in 2023, an increase of 518 jobs.

Pocono Mountains Direct Spending Timeline

Amounts in \$ millions, 2023 percent % change

	2019	2020	2021	2022	2023
Pocono Mountains	\$4,163.1	\$3,209.5	\$4,337.8	\$4,810.7	\$4,839.0
Percent Change	5.9%	-22.9%	35.2%	10.9%	0.6%
Carbon	\$443.2	\$376.5	\$502.5	\$564.2	\$586.9
Monroe	\$2,476.5	\$1,846.0	\$2,584.1	\$2,833.6	\$2,858.4
Pike	\$730.3	\$557.6	\$692.8	\$775.8	\$774.7
Wayne	\$513.1	\$429.5	\$558.4	\$637.1	\$618.9

Source: Tourism Economics

Pocono Mountains Direct Employment Timeline

Amounts in \$ millions, 2023 percent % change

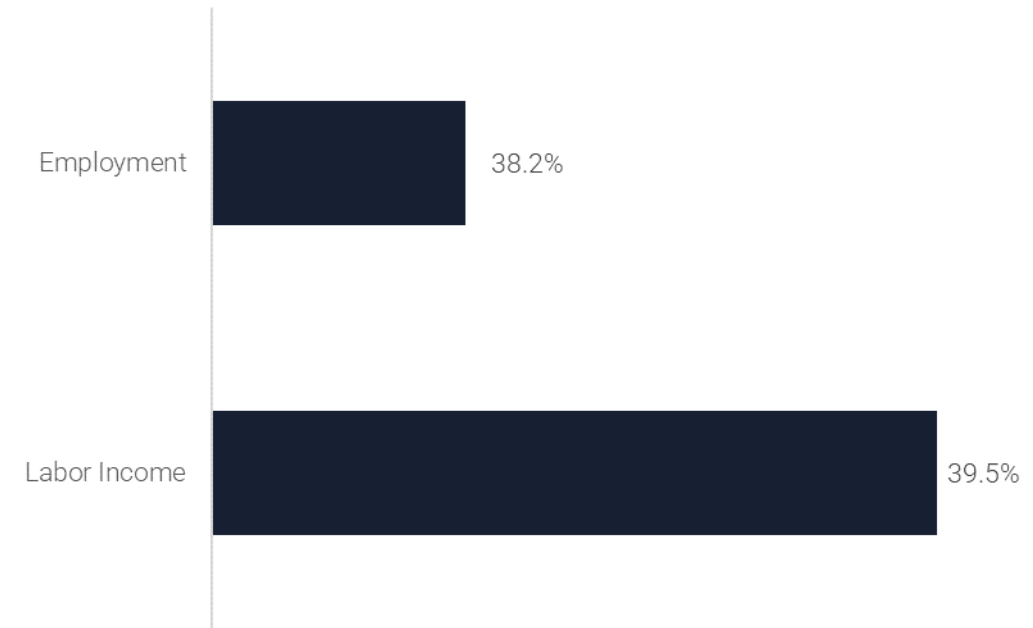
	2019	2020	2021	2022	2023
Pocono Mountains	26,842	21,632	24,478	25,582	26,100
Percent Change	2.3%	-19.4%	13.2%	4.5%	2.0%
Carbon	3,008	2,491	2,889	3,109	3,191
Monroe	14,749	11,564	12,978	13,340	13,701
Pike	5,574	4,682	5,258	5,570	5,665
Wayne	3,511	2,895	3,354	3,563	3,542

Source: Tourism Economics

Total visitor supported employment and labor income, including indirect, and induced impacts, comprised 38.2% and 39.5% of the total jobs and wages earned in the Pocono Mountains Region.

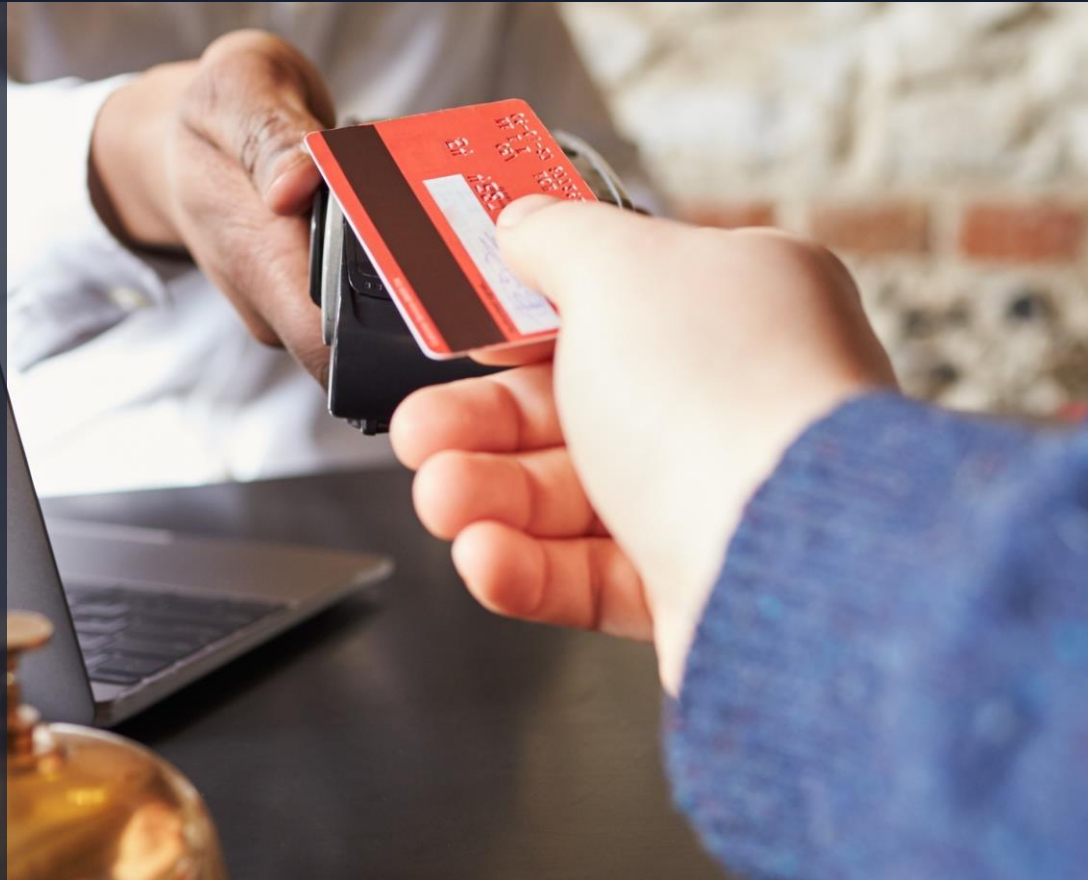
Pocono Mountains Tourism Share of Region Economy (2023)

Visitor supported share of employment and payroll (Total Impacts)



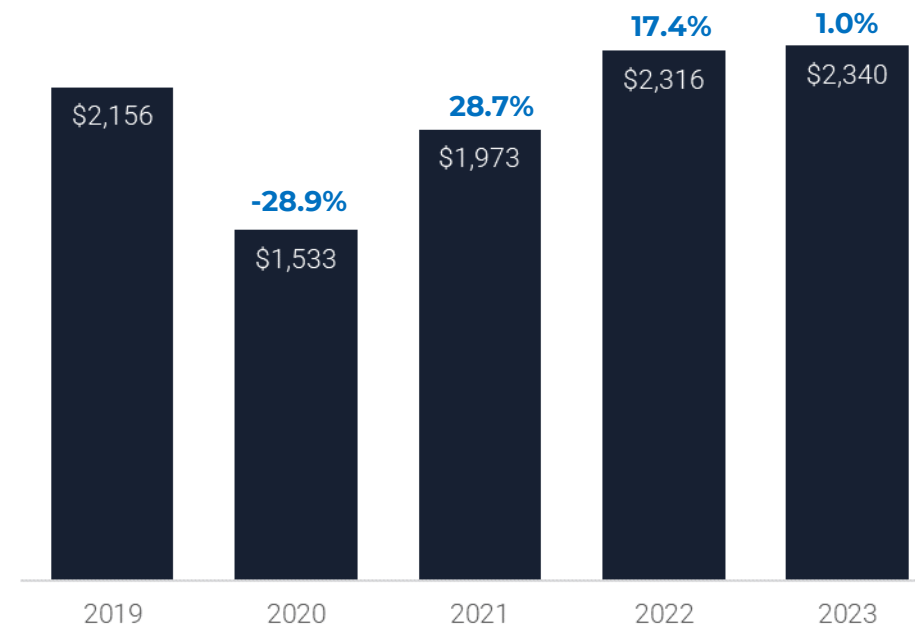
Source: BLS, Tourism Economics

Visitors to Upstate PA spent **\$2.3 billion** in 2023.



Upstate PA Visitor Spending

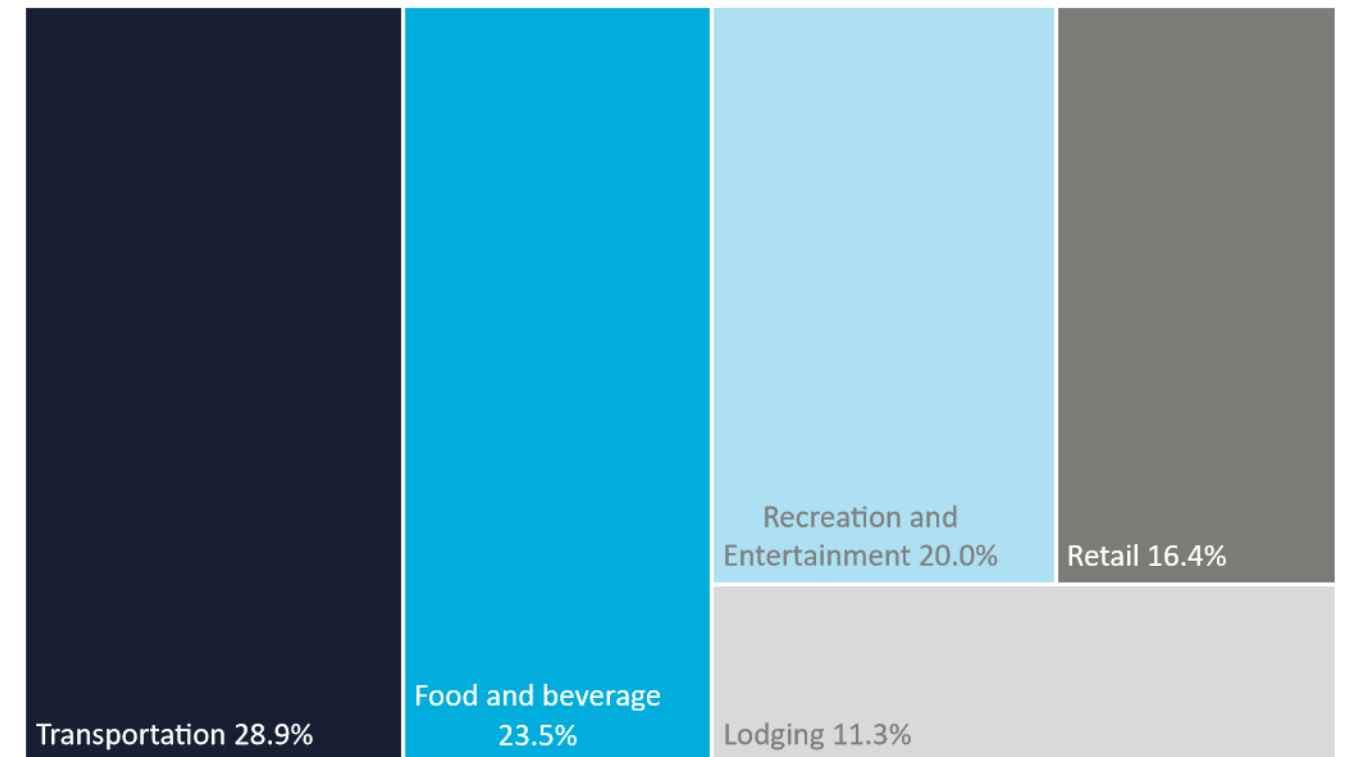
Amounts in \$ millions



Source: Tourism Economics

Visitor Spending by Category

Percent of total



Source: Tourism Economics

Upstate PA Visitor Spending

Upstate PA Visitor Spending

Amounts in \$ millions

	Lodging	Food and beverage	Recreation	Retail	Transportation	Total
Upstate PA	\$263.2	\$550.0	\$468.2	\$383.0	\$675.1	\$2,339.6
Percent Change	-0.5%	2.5%	5.9%	-0.8%	-1.6%	1.0%
Bradford	\$24.4	\$54.7	\$44.4	\$36.1	\$80.6	\$240.3
Lackawanna	\$85.4	\$178.8	\$147.0	\$129.0	\$175.5	\$715.9
Luzerne	\$125.6	\$251.5	\$215.2	\$172.8	\$313.0	\$1,078.0
Sullivan	\$4.4	\$5.5	\$7.9	\$4.2	\$7.1	\$29.0
Susquehanna	\$14.7	\$45.0	\$42.2	\$29.2	\$77.6	\$208.8
Wyoming	\$8.8	\$14.5	\$11.5	\$11.7	\$21.3	\$67.7

Source: Tourism Economics

Note: Lodging spending is calculated as an industry and includes the value of short-term rentals and second homes. Transportation includes both air and local transportation.

Upstate PA Economic Impacts

Upstate PA Visitor Economy Direct Impacts

Amounts in \$ millions, number of jobs, and 2023 percent % change

	Visitor Spend	Employment	Labor Income	State & Local Taxes	Federal Taxes
Upstate PA	\$2,339.6	15,475	\$563.8	\$118.0	\$131.4
Percent Change	1.0%	1.8%	2.4%	0.4%	1.5%
Bradford	\$240.3	1,520	\$49.1	\$10.9	\$12.0
Lackawanna	\$715.9	5,049	\$169.4	\$37.3	\$39.8
Luzerne	\$1,078.0	6,925	\$285.6	\$55.9	\$64.4
Sullivan	\$29.0	218	\$6.3	\$1.4	\$1.5
Susquehanna	\$208.8	1,340	\$39.8	\$9.1	\$10.2
Wyoming	\$67.7	423	\$13.6	\$3.3	\$3.4

Source: Tourism Economics

Upstate PA Visitor Economy Total Impacts

Amounts in \$ millions, number of jobs, and 2023 percent % change

	Total Business Sales	Employment	Labor Income	State & Local Taxes	Federal Taxes
Upstate PA	\$3,782.1	24,096	\$1,038.6	\$223.6	\$236.8
Percent Change	1.3%	1.3%	1.8%	0.9%	2.0%
Bradford	\$368.9	2,303	\$82.8	\$21.0	\$21.7
Lackawanna	\$1,173.2	7,830	\$319.5	\$69.8	\$72.0
Luzerne	\$1,780.0	10,968	\$534.6	\$106.5	\$116.1
Sullivan	\$42.3	302	\$9.4	\$2.6	\$2.7
Susquehanna	\$307.0	2,017	\$66.5	\$17.5	\$18.1
Wyoming	\$110.7	676	\$25.9	\$6.2	\$6.2

Source: Tourism Economics



Upstate PA Visitor Economy Timeline

Employment directly supported by visitor spending grew 1.8% in 2023, an increase of 268 jobs.

Upstate PA Direct Spending Timeline

Amounts in \$ millions, 2023 percent % change

	2019	2020	2021	2022	2023
Upstate PA	\$2,155.8	\$1,532.7	\$1,973.1	\$2,316.0	\$2,339.6
Percent Change	2.5%	-28.9%	28.7%	17.4%	1.0%
Bradford	\$213.0	\$161.2	\$194.1	\$225.9	\$240.3
Lackawanna	\$682.5	\$484.7	\$623.7	\$726.6	\$715.9
Luzerne	\$1,006.7	\$686.3	\$897.7	\$1,062.2	\$1,078.0
Sullivan	\$21.2	\$19.3	\$24.8	\$27.3	\$29.0
Susquehanna	\$167.6	\$126.1	\$170.5	\$201.4	\$208.8
Wyoming	\$64.7	\$55.1	\$62.2	\$72.6	\$67.7

Source: Tourism Economics

Upstate PA Direct Employment Timeline

Amounts in \$ millions, 2023 percent % change

	2019	2020	2021	2022	2023
Upstate PA	15,986	12,502	14,089	15,207	15,475
Percent Change	1.2%	-21.8%	12.7%	7.9%	1.8%
Bradford	1,469	1,280	1,404	1,499	1,520
Lackawanna	5,439	4,113	4,638	5,009	5,049
Luzerne	7,259	5,588	6,275	6,775	6,925
Sullivan	183	165	189	205	218
Susquehanna	1,202	987	1,177	1,276	1,340
Wyoming	434	370	406	444	423

Source: Tourism Economics

Total visitor supported employment and labor income, including indirect, and induced impacts, comprised 8.5% and 6.8% of the total jobs and wages earned in the Upstate PA Region.

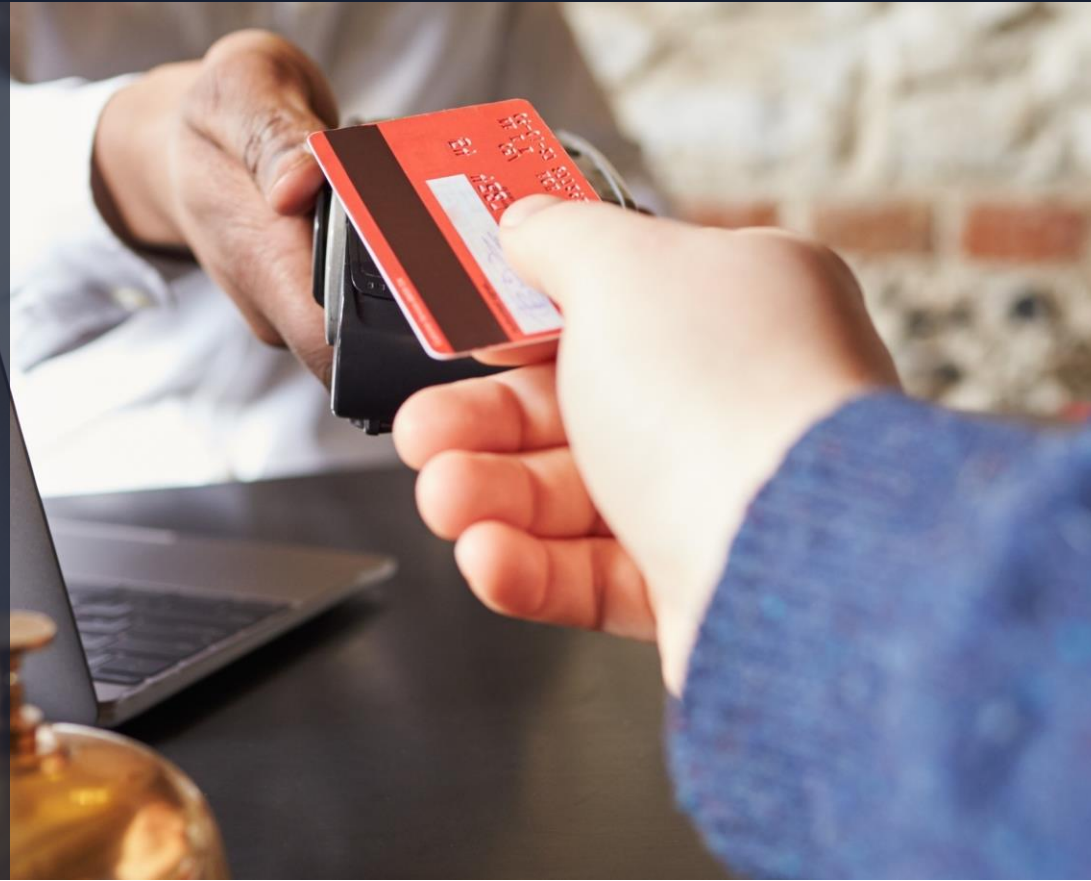
Upstate PA Tourism Share of Region Economy (2023)

Visitor supported share of employment and payroll (Total Impacts)



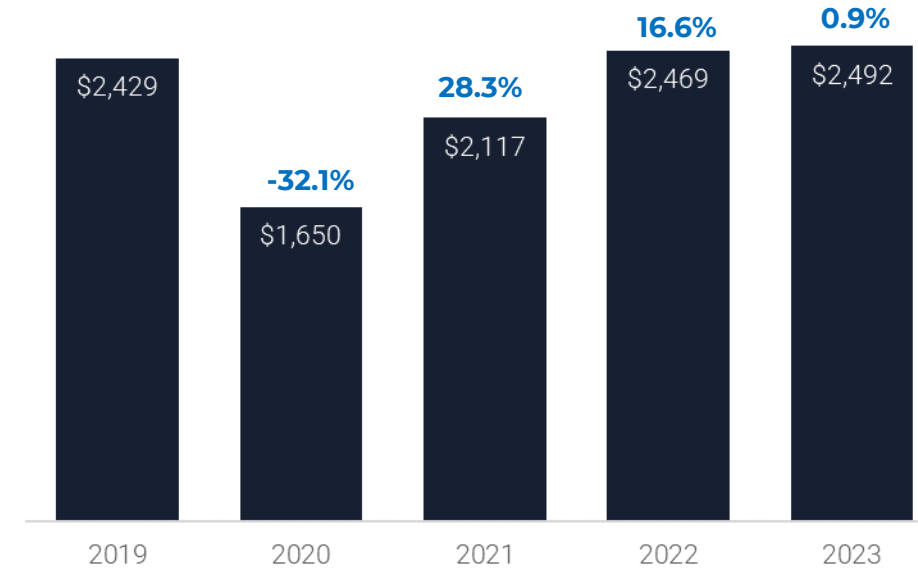
Source: BLS, Tourism Economics

Visitors to the Lehigh Valley spent **\$2.5 billion** in 2023.



Lehigh Valley Visitor Spending

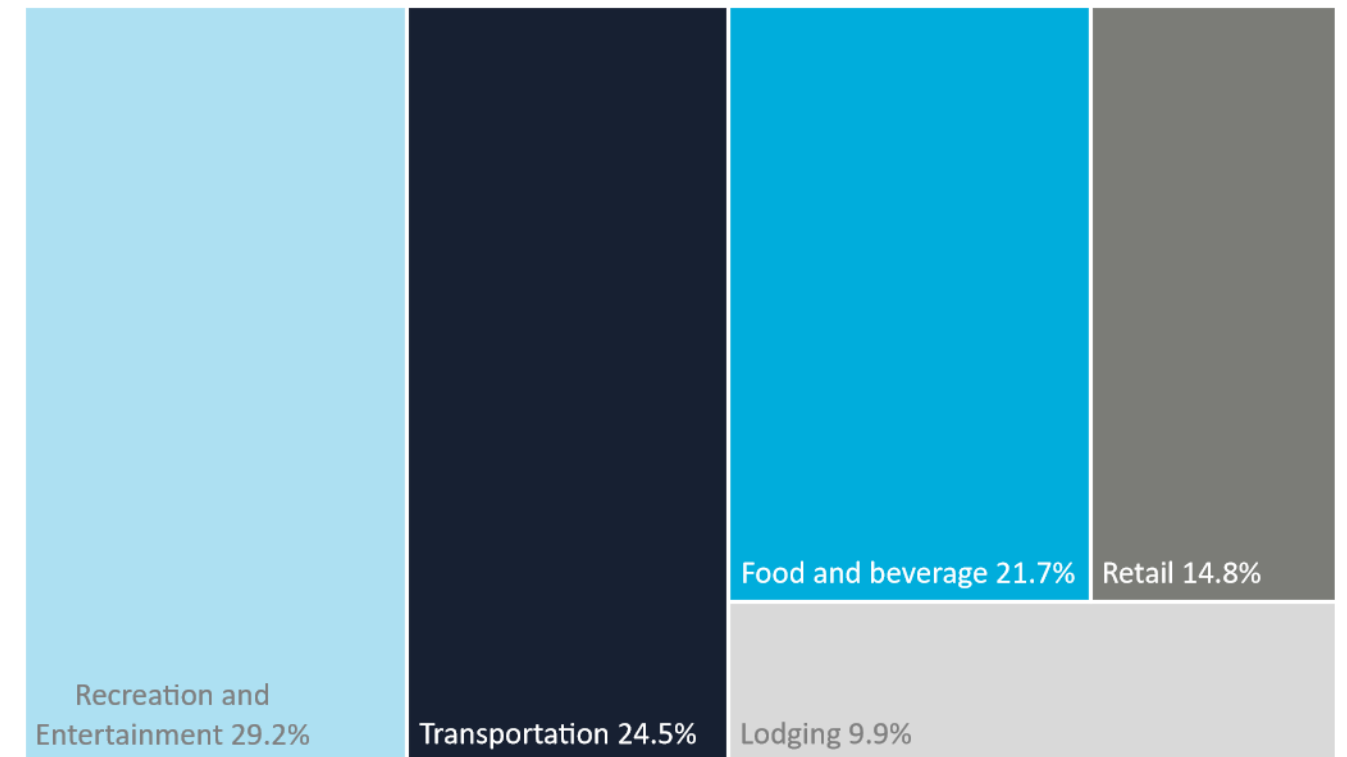
Amounts in \$ millions



Source: Tourism Economics

Visitor Spending by Category

Percent of total



Source: Tourism Economics

Lehigh Valley Visitor Spending

Lehigh Valley Visitor Spending

Amounts in \$ millions

	Lodging	Food and beverage	Recreation	Retail	Transportation	Total
Lehigh Valley	\$245.8	\$539.6	\$727.4	\$368.4	\$610.4	\$2,491.6
Percent Change	-2.2%	1.0%	7.3%	-3.3%	-2.3%	0.9%
Lehigh	\$143.8	\$321.0	\$256.7	\$231.9	\$374.2	\$1,327.6
Northampton	\$102.0	\$218.6	\$470.7	\$136.5	\$236.2	\$1,164.0

Source: Tourism Economics

Note: Lodging spending is calculated as an industry and includes the value of short-term rentals and second homes. Transportation includes both air and local transportation.

Lehigh Valley Economic Impacts

Lehigh Valley Visitor Economy Direct Impacts

Amounts in \$ millions, number of jobs, and 2023 percent % change

	Visitor Spend	Employment	Labor Income	State & Local Taxes	Federal Taxes
Lehigh Valley	\$2,491.6	16,458	\$698.0	\$129.6	\$155.3
Percent Change	0.9%	4.7%	4.8%	0.8%	3.6%
Lehigh	\$1,327.6	8,494	\$333.1	\$67.2	\$77.5
Northampton	\$1,164.0	7,964	\$364.9	\$62.3	\$77.9

Source: Tourism Economics

Lehigh Valley Visitor Economy Total Impacts

Amounts in \$ millions, number of jobs, and 2023 percent % change

	Total Business Sales	Employment	Labor Income	State & Local Taxes	Federal Taxes
Lehigh Valley	\$4,227.5	25,835	\$1,349.8	\$249.5	\$279.6
Percent Change	2.6%	3.4%	3.7%	1.5%	4.1%
Lehigh	\$2,261.3	13,345	\$635.2	\$129.2	\$140.1
Northampton	\$1,966.2	12,490	\$714.6	\$120.3	\$139.5

Source: Tourism Economics



Lehigh Valley Economy Timeline

Employment directly supported by visitor spending grew 4.7% in 2023, an increase of 734 jobs.

Lehigh Valley Direct Spending Timeline

Amounts in \$ millions, 2023 percent % change

	2019	2020	2021	2022	2023
Lehigh Valley	\$2,429.4	\$1,650.5	\$2,117.4	\$2,469.1	\$2,491.6
Percent Change	3.2%	-32.1%	28.3%	16.6%	0.9%
Lehigh	\$1,348.2	\$921.4	\$1,194.7	\$1,362.7	\$1,327.6
Northampton	\$1,081.2	\$729.1	\$922.7	\$1,106.5	\$1,164.0

Source: Tourism Economics

Lehigh Valley Direct Employment Timeline

Amounts in \$ millions, 2023 percent % change

	2019	2020	2021	2022	2023
Lehigh Valley	16,769	12,803	14,327	15,724	16,458
Percent Change	2.2%	-23.7%	11.9%	9.7%	4.7%
Lehigh	8,844	6,715	7,623	8,255	8,494
Northampton	7,925	6,088	6,704	7,468	7,964

Source: Tourism Economics

Total visitor supported employment and labor income, including indirect, and induced impacts, comprised 8.1% and 6.6% of the total jobs and wages earned in the Lehigh Valley.

Lehigh Valley Tourism Share of Region Economy (2023)

Visitor supported share of employment and payroll (Total Impacts)



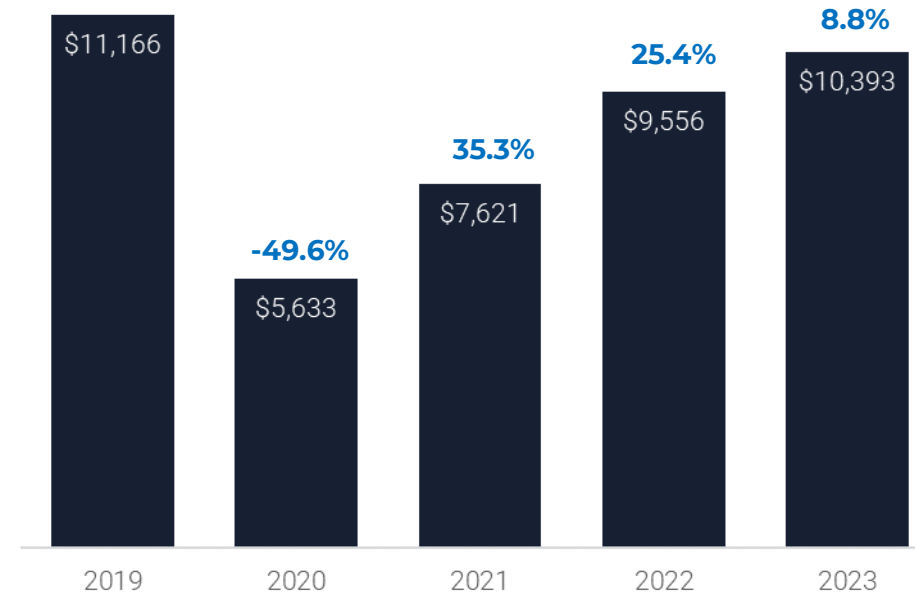
Source: BLS, Tourism Economics

Visitors to Philadelphia & its Countryside spent **\$10.4 billion** in 2023.



Philadelphia & its Countryside Visitor Spending

Amounts in \$ millions



Source: Tourism Economics

Philadelphia & its Countryside Visitor Spending

Philadelphia & its Countryside Visitor Spending

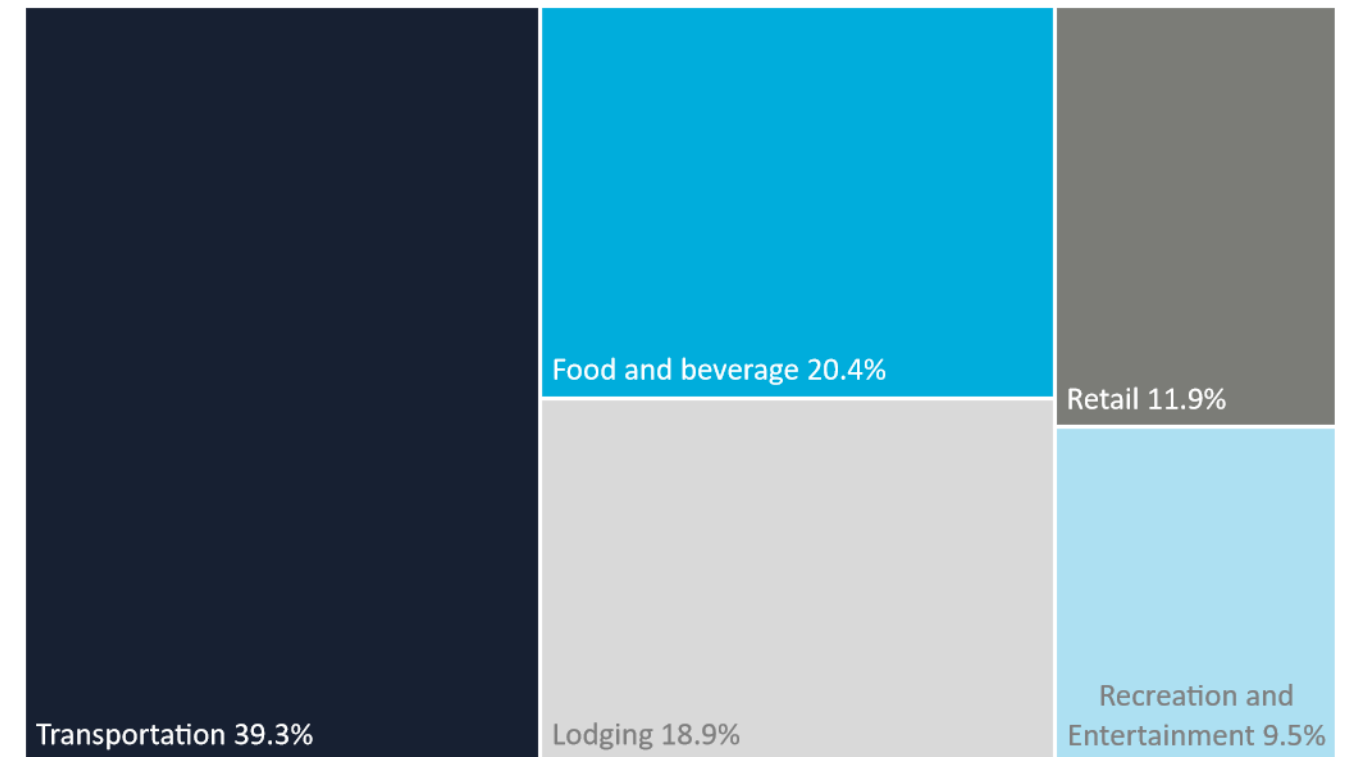
Amounts in \$ millions

	Lodging	Food and beverage	Recreation	Retail	Transportation	Total
Philadelphia & the Countryside	\$1,961.1	\$2,116.4	\$988.3	\$1,240.9	\$4,086.6	\$10,393.3
Percent Change	8.6%	10.8%	15.6%	7.8%	6.6%	8.8%
Bucks	\$178.3	\$216.9	\$112.4	\$135.9	\$345.2	\$988.7
Chester	\$148.7	\$194.7	\$111.6	\$118.6	\$251.9	\$825.5
Delaware	\$145.5	\$195.1	\$92.0	\$117.5	\$315.6	\$865.7
Montgomery	\$351.6	\$303.2	\$125.8	\$182.2	\$521.3	\$1,484.1
Philadelphia	\$1,137.1	\$1,206.5	\$546.4	\$686.7	\$2,652.5	\$6,229.3

Source: Tourism Economics

Visitor Spending by Category

Percent of total



Source: Tourism Economics

Note: Lodging spending is calculated as an industry and includes the value of short-term rentals and second homes. Transportation includes both air and local transportation.

Philadelphia & its Countryside Economic Impacts

Philadelphia & its Countryside Visitor Economy Direct Impacts

Amounts in \$ millions, number of jobs, and 2023 percent % change

	Visitor Spend	Employment	Labor Income	State & Local Taxes	Federal Taxes
Philadelphia & the Countryside	\$10,393.3	74,186	\$3,905.6	\$676.6	\$793.5
Percent Change	8.8%	7.0%	10.8%	6.4%	9.7%
Bucks	\$988.7	9,255	\$393.6	\$64.3	\$78.6
Chester	\$825.5	7,751	\$342.7	\$53.6	\$68.0
Delaware	\$865.7	7,671	\$363.8	\$53.9	\$71.9
Montgomery	\$1,484.1	14,257	\$644.2	\$98.3	\$126.6
Philadelphia	\$6,229.3	35,252	\$2,161.2	\$406.5	\$448.4

Source: Tourism Economics

Philadelphia & its Countryside Visitor Economy Total Impacts

Amounts in \$ millions, number of jobs, and 2023 percent % change

	Total Business Sales	Employment	Labor Income	State & Local Taxes	Federal Taxes
Philadelphia & the Countryside	\$20,109.0	128,144	\$7,652.2	\$1,231.6	\$1,407.2
Percent Change	10.2%	6.1%	9.3%	5.6%	8.9%
Bucks	\$1,993.6	16,402	\$727.2	\$121.0	\$140.8
Chester	\$1,811.2	13,742	\$638.6	\$100.2	\$120.4
Delaware	\$1,763.1	13,797	\$673.7	\$103.5	\$127.5
Montgomery	\$3,379.3	24,703	\$1,235.9	\$184.4	\$223.6
Philadelphia	\$11,161.9	59,500	\$4,376.8	\$722.6	\$794.9

Source: Tourism Economics



Philadelphia & its Countryside Economy Timeline

Employment directly supported by visitor spending grew 7.0% in 2023, an increase of 4,870 jobs.

Philadelphia & its Countryside Direct Spending Timeline

Amounts in \$ millions, 2023 percent % change

	2019	2020	2021	2022	2023
Philadelphia & the Countryside	\$11,165.9	\$5,633.0	\$7,620.9	\$9,555.7	\$10,393.3
Percent Change	3.3%	-49.6%	35.3%	25.4%	8.8%
Bucks	\$929.8	\$670.5	\$842.1	\$971.8	\$988.7
Chester	\$879.0	\$511.2	\$650.2	\$771.3	\$825.5
Delaware	\$796.7	\$545.2	\$715.0	\$825.3	\$865.7
Montgomery	\$1,484.1	\$849.5	\$1,137.1	\$1,401.8	\$1,484.1
Philadelphia	\$7,076.3	\$3,056.6	\$4,276.5	\$5,585.4	\$6,229.3

Source: Tourism Economics

Philadelphia & its Countryside Direct Employment Timeline

Amounts in \$ millions, 2023 percent % change

	2019	2020	2021	2022	2023
Philadelphia & the Countryside	79,162	55,683	62,216	69,316	74,186
Percent Change	2.1%	-29.7%	11.7%	11.4%	7.0%
Bucks	9,614	7,450	8,426	9,053	9,255
Chester	8,015	5,854	6,557	7,247	7,751
Delaware	8,149	6,163	6,857	7,356	7,671
Montgomery	14,636	10,737	12,097	13,312	14,257
Philadelphia	38,748	25,479	28,278	32,347	35,252

Source: Tourism Economics

Total visitor supported employment and labor income, including indirect, and induced impacts, comprised 6.6% and 5.0% of the total jobs and wages earned in Philadelphia & its Countryside.

Philadelphia & its Countryside Tourism Share of Region Economy (2023)

Visitor supported share of employment and payroll (Total Impacts)



Source: BLS, Tourism Economics

APPENDIX



Appendix

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 visitors spending within the arts, entertainment and recreation sub-sector.
Shopping	Includes visitor spending in all retail sub-sectors within the local economy.
Local transport	Includes visitor spending on local transport services such as taxis, limos, trains, rental cars, 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	Employment is measured by the Bureau of Economic Analysis (BEA) and Bureau of Labor Statistics (BLS) definitions, and captures full-time and part-time jobs, which includes salary and wage employees and proprietors.
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 the Research Team

Oxford Economics was founded in 1981 as a commercial venture with Oxford University's business college to provide economic forecasting and modelling to UK companies and financial institutions expanding abroad. Since then, we have become one of the world's foremost independent global advisory firms, providing reports, forecasts and analytical tools on 200 countries, 100 industrial sectors and over 3,000 cities. Our best-of-class global economic and industry models and analytical tools give us an unparalleled ability to forecast external market trends and assess their economic, social and business impact.

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This study was conducted by the Tourism Economics group within Oxford Economics. Tourism Economics combines an understanding of traveler dynamics with rigorous economics in order to answer the most important questions facing destinations, investors, and strategic planners. By combining quantitative methods with industry knowledge, Tourism Economics designs custom market strategies, destination recovery plans, forecasting models, policy analysis, and economic impact studies.

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