

# ECONOMIC IMPACT OF TOURISM IN THE APPALACHIAN REGION OF OHIO 2019

Prepared for:  
TourismOhio



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# INTRODUCTION

The travel sector is an integral part of the Ohio economy. Visitors generate significant economic benefits to households, businesses, and government alike and represent a critical driver of Ohio's future.

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. By establishing a baseline of economic impacts, the industry can track its progress over time.

To quantify the economic significance of the tourism sector in Ohio, Tourism Economics prepared a comprehensive model using multiple primary and secondary data sources to quantify the economic impacts arising from visitor spending.

Impact modeling is based on an IMPLAN Input-Output (I-O) model for Ohio. The results of this study show the scope of the travel sector in terms of direct visitor spending, and total economic impacts, including employment, household income, and tax impacts in the broader economy.

The County level analysis shares out the state impacts to all Ohio counties, and includes tourism sales, employment generated, income earned, and tax revenues generated.

The state and county level analyses draw on the following data sources:

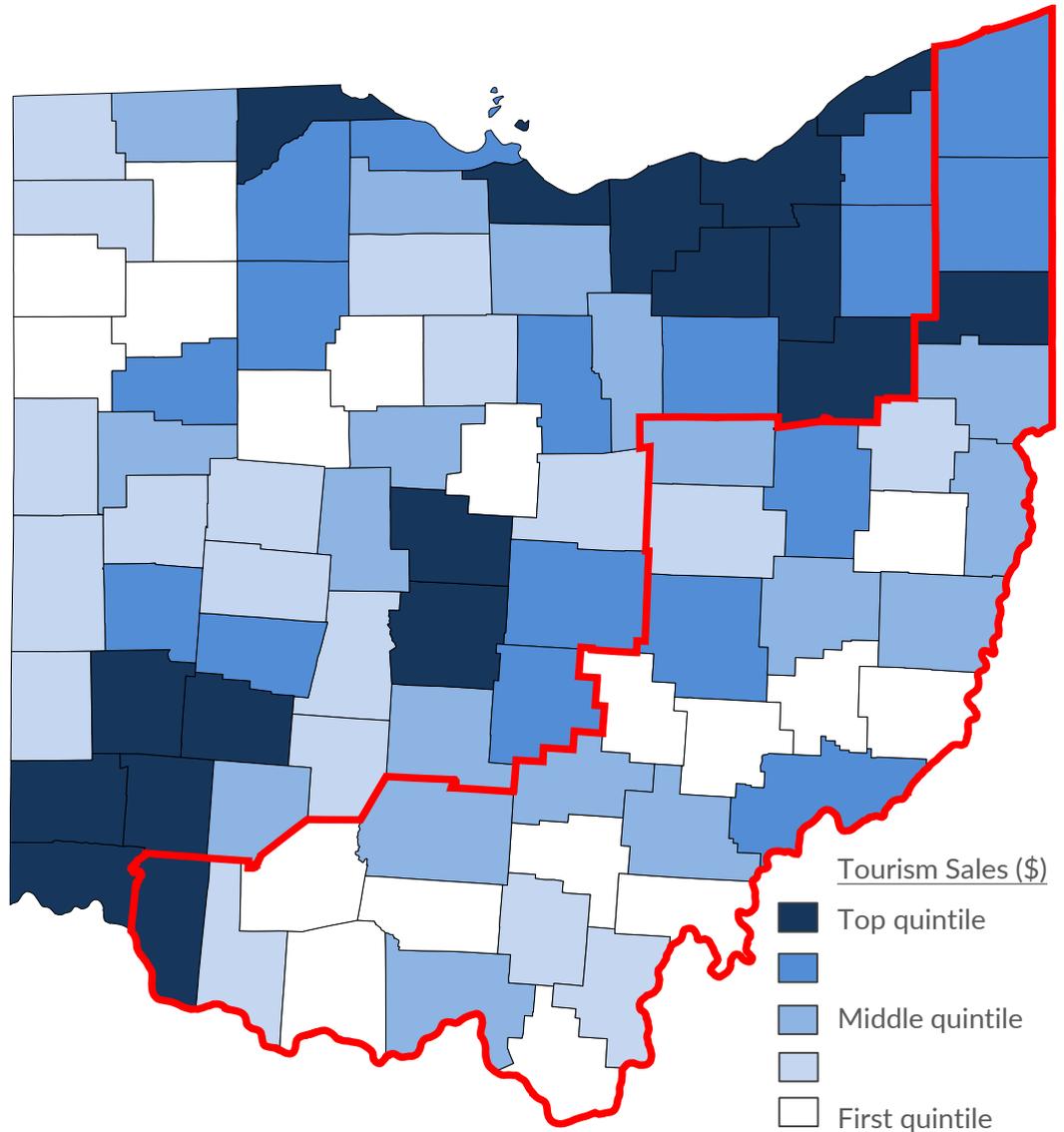
- Longwoods International: survey data, including spending and visitor profile characteristics for visitors to Ohio.
- Bureau of Economic Analysis and Bureau of Labor Statistics: employment and wage data, by industry by county.
- STR: Lodging performance data, including room demand, room rates, occupancy, and room revenue by county.
- Tax collections: Lodging, restaurant, and recreation tax receipts at the county level.
- US Census: business sales by industry and seasonal second homes inventory.
- Tourism Economics: international travel data for overseas, Canadian, and Mexican travel to Ohio based on aviation, survey, and credit card information

# KEY FINDINGS

## Appalachian Region

Appalachian Region	Tourism impact
Sales	\$5.9 billion
Wages	\$1.4 billion
Taxes	\$0.7 billion
Employment	60,173

Appalachian Region  
in Red



# KEY FINDINGS

## Appalachian Region

### Growth in visitation, spending, and employment

Tourism is an integral part of the Appalachian Region economy and continues to be a key driver of business sales, employment, and tax revenue.

Approximately 12.1% of all Ohio tourism jobs were sustained by tourism in the Appalachian Region.



### Visitor Spending

Visitors to Appalachian Region spent \$3.8 billion in 2019, which generated \$5.9 billion in business sales when including indirect impacts.



### Employment Generator

A total of 60,173 jobs were sustained by visitors to Appalachian Region in 2019. This included 44,905 direct and 15,268 indirect and induced jobs.



### Fiscal Contributions

Tourism in Appalachian Region generated \$713.8 million in tax revenues in 2019, with \$353.4 million accruing to state and local governments.

# STATE SUMMARY



## ECONOMIC IMPACTS

How visitor spending generates employment and income

Our analysis of tourism's impact on Ohio begins with actual spending by visitors, but also considers the downstream effects of this injection of spending into the local economy. To determine the total economic impact of tourism in Ohio, we input visitor spending into a model of the Ohio economy created in IMPLAN. This model calculates three distinct types of impact: direct, indirect, and induced.

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

- 1. Direct Impacts:** Visitors create direct economic value within a discrete group of sectors (e.g. recreation, transportation). This supports a relative proportion of jobs, wages, taxes, and GDP 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.
- 3. Induced Impacts:** Lastly, the induced impact is generated when employees whose wages are generated either directly or indirectly by visitors, spend those wages in the local economy.

# KEY FINDINGS: OHIO

The tourism economy is an engine for economic growth

## Growth in visitation, spending, and employment

Tourism is an integral part of the Ohio economy and continues to be a key driver of business sales, employment, and tax revenue.

Approximately 8.9% of all jobs in Ohio were sustained by tourism.



### Visitation

More than 226 million domestic and international travelers visited Ohio in 2019.



### Visitor Spending

Visitors to Ohio spent \$38.3 billion in 2019, which generated \$48.6 billion in business sales when including indirect impacts.



### Employment Generator

A total of 431,447 jobs were sustained by visitors to Ohio in 2019. This included 370,268 direct and 61,180 indirect jobs.



### Fiscal Contributions

Tourism in Ohio generated \$7.3 billion in tax revenues in 2019, with \$3.6 billion accruing to state and local governments.

# KEY FINDINGS: OHIO

The tourism economy is an engine for economic growth

## Visitor spending

Visitor spending grew at an annualized rate of 4.1% over the past five years, increasing from \$32.8 billion in 2015 to \$38.3 billion in 2019.

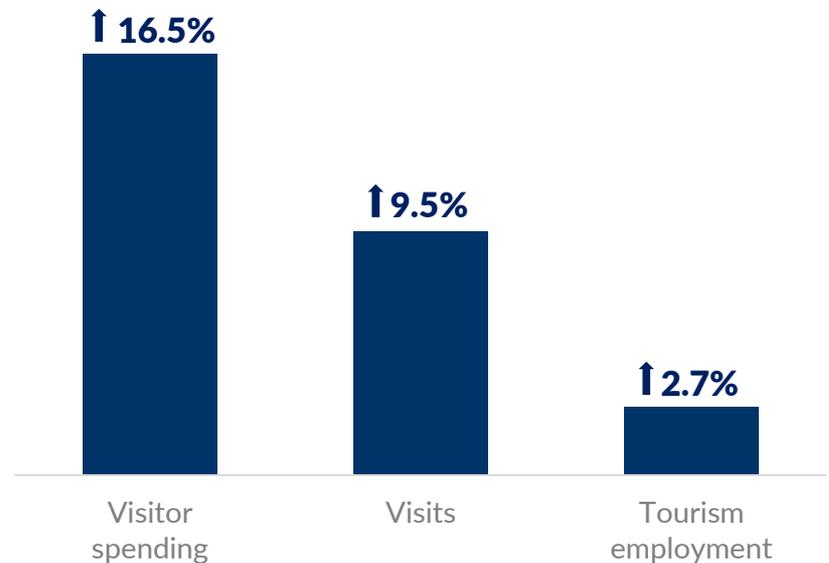
## Visits

Ohio welcomed 20 million more visits in 2019 than in 2015, reaching 226.5 million visits in 2019 and growing nearly 10% since 2015.

## Tourism employment

The number of jobs directly supported by visitors increased by 9,600 jobs since 2015, reaching 370,000 in 2019.

Cumulative Growth in Key Indicators, 2015-2019



Source: Longwoods International; Tourism Economics

# VISITATION AND SPENDING

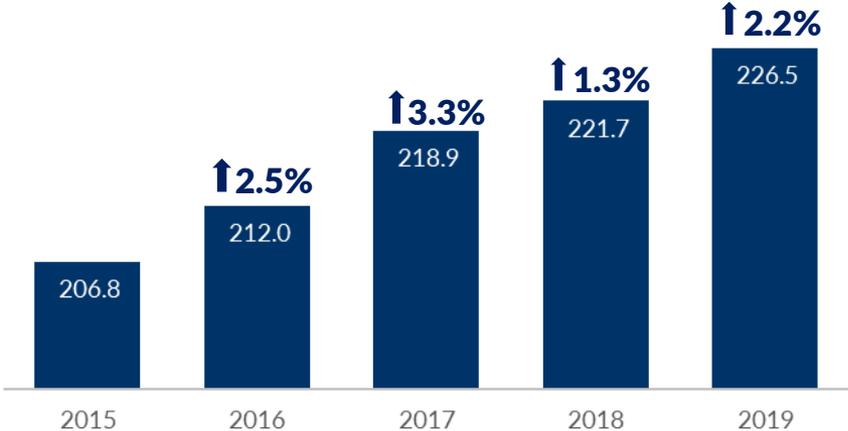
Total visitor count

Visitation growth continues to accelerate, increasing by at least 2.7 million visitors in each of the past four years to reach 226.5 million.

In 2019, visitation grew by 4.8 million visitors or 2.2%. Since 2015, visitation grew by nearly 20 million visitors.

## Ohio visitor levels and annual growth

Amounts in millions of visitors and year-on-year percentage growth



Source: Tourism Economics

# VISITATION AND SPENDING

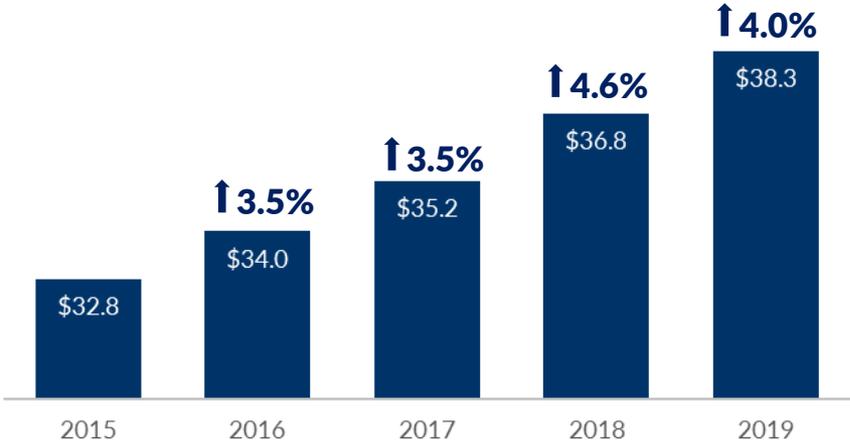
## Total visitor spending

Visitor spending increased by \$1.5 billion to \$38.3 billion in 2019, as increased visitation supported more spending.

Visitor spending increased by approximately \$5.5 billion since 2015. Nearly 60% of the growth since 2015 occurred in the past two years.

### Ohio total visitor spending

Amounts in billions of nominal dollars and year-on-year percentage growth



Source: Tourism Economics

# VISITATION AND SPENDING

Total visitor spending

Visitors to Ohio spent nearly \$38.3 billion across a wide range of sectors.

In 2019, visitors to Ohio spent nearly \$38.3 billion, including \$12.4 billion on air and local transportation, \$10.0 billion on food and beverage, \$6.4 billion on recreation, \$5.3 billion on retail, and \$4.3 billion on lodging.



Note: Lodging spending is calculated as an industry, including meetings, catering, etc. Spending also includes dollars spend on second homes. Transport includes both air and local transportation.

Source: Tourism Economics

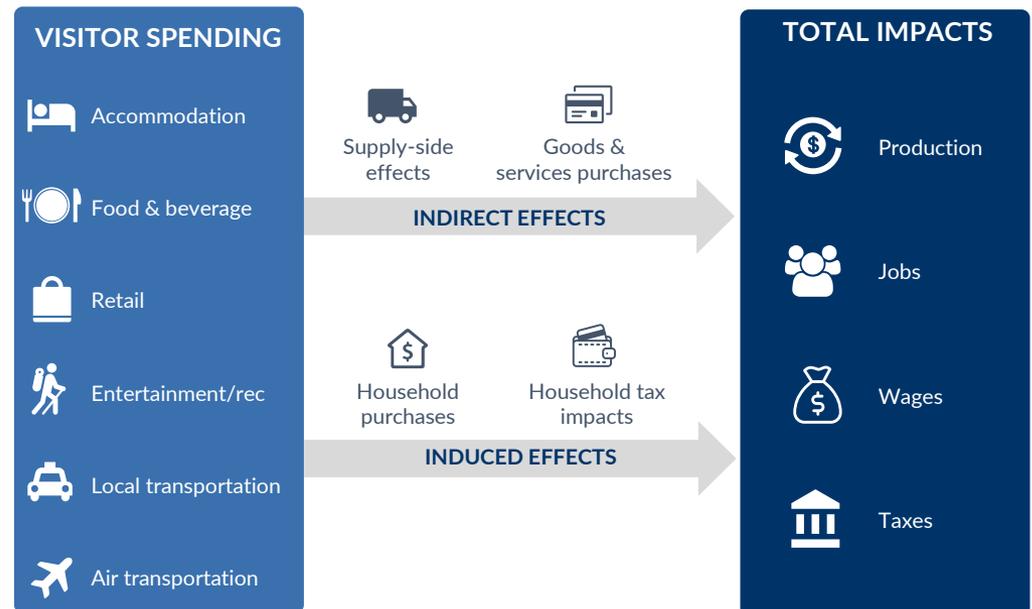
# ECONOMIC IMPACTS

How visitor spending generates employment and income

## Economic impact flowchart

IMPLAN is particularly effective because it calculates these three levels of impact – direct, indirect, and induced – for a broad set of indicators. These include the following:

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



# ECONOMIC IMPACTS

## Business sales impacts by industry

Visitors and tourism businesses spent \$38.3 billion in Ohio in 2019. This supported a total of \$58.1 billion in business sales when indirect and induced impacts are considered.

Summary economic impacts (\$ billions)



## Business sales impacts by industry

Amounts in millions of current dollars	Direct sales	Indirect sales	Induced sales	Total sales
<b>Total, all industries</b>	<b>\$38,257</b>	<b>\$10,337</b>	<b>\$9,553</b>	<b>\$58,147</b>
<b>By industry</b>				
Food & beverage	\$8,567	\$160	\$475	\$9,201
Retail trade	\$6,689	\$261	\$1,122	\$8,072
Gasoline stations	\$6,474	\$18	\$69	\$6,560
FIRE	\$2,249	\$2,265	\$1,788	\$6,302
Recreation and entertainment	\$5,867	\$221	\$167	\$6,255
Lodging	\$4,258	\$52	\$48	\$4,359
Business services	\$128	\$2,562	\$753	\$3,443
Other transport	\$2,723	\$368	\$140	\$3,231
Manufacturing		\$2,157	\$1,054	\$3,211
Education and healthcare		\$9	\$1,661	\$1,670
Government		\$222	\$1,029	\$1,251
Personal services	\$383	\$266	\$446	\$1,094
Air transport	\$921	\$22	\$18	\$961
Construction and utilities		\$671	\$267	\$939
Communications		\$475	\$224	\$699
Agriculture, fishing, mining		\$429	\$172	\$600
Wholesale trade		\$179	\$119	\$298

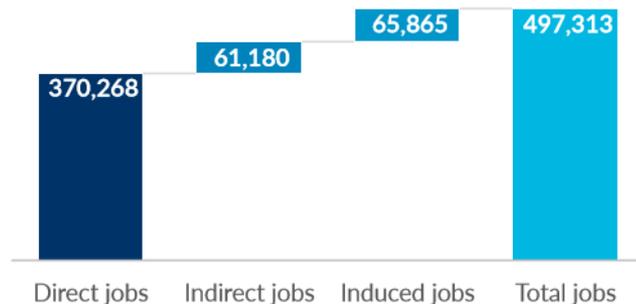
Source: Tourism Economics

# ECONOMIC IMPACTS

## Employment impacts by industry

Tourism supported a total of 497,313 jobs when indirect and induced impacts are considered.

Summary employment impacts (number of jobs)



## Employment impacts by industry

Amounts in number of jobs	Direct jobs	Indirect jobs	Induced jobs	Total jobs
<b>Total, all industries</b>	<b>370,268</b>	<b>61,180</b>	<b>65,865</b>	<b>497,313</b>
<b>By industry</b>				
Food & beverage	157,128	2,771	7,716	167,615
Recreation and entertainment	68,166	3,972	2,226	74,364
Retail trade	41,381	2,805	12,337	56,523
Lodging	44,128	612	531	45,272
Other transport	34,132	5,707	2,093	41,932
Business services	142	20,153	6,114	26,409
FIRE	7,373	10,022	5,895	23,290
Education and healthcare		201	17,492	17,693
Gasoline stations	11,954	183	680	12,816
Personal services	2,234	2,460	5,773	10,467
Manufacturing		3,967	1,762	5,729
Agriculture, fishing, mining		2,815	1,074	3,889
Air transport	3,629	60	59	3,749
Construction and utilities		1,999	462	2,461
Communications		1,769	670	2,439
Government		1,014	538	1,552
Wholesale trade		670	443	1,113

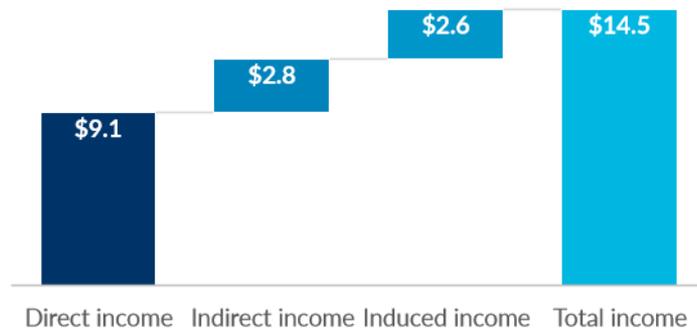
Source: Tourism Economics

# ECONOMIC IMPACTS

## Personal income impacts by industry

Tourism generated \$9.1 billion in direct income and \$14.5 billion when indirect and induced impacts are considered.

Summary personal income impacts (\$ billions)



## Personal income impacts by industry

Amounts in millions of current dollars	Direct income	Indirect income	Induced income	Total income
<b>Total, all industries</b>	<b>\$9,078</b>	<b>\$2,828</b>	<b>\$2,635</b>	<b>\$14,541</b>
<b>By industry</b>				
Food & beverage	\$3,026	\$54	\$150	\$3,230
Recreation and entertainment	\$1,811	\$73	\$56	\$1,940
Retail trade	\$993	\$92	\$376	\$1,460
Other transport	\$1,040	\$294	\$106	\$1,439
Business services	\$8	\$1,046	\$315	\$1,369
Lodging	\$1,271	\$18	\$15	\$1,303
FIRE	\$210	\$393	\$281	\$885
Education and healthcare		\$5	\$813	\$818
Manufacturing		\$260	\$121	\$381
Gasoline stations	\$344	\$6	\$20	\$370
Air transport	\$324	\$7	\$6	\$338
Personal services	\$52	\$93	\$165	\$310
Construction and utilities		\$187	\$66	\$253
Communications		\$117	\$46	\$162
Agriculture, fishing, mining		\$72	\$32	\$105
Government		\$67	\$31	\$97
Wholesale trade		\$46	\$35	\$81

Source: Tourism Economics

# ECONOMIC IMPACTS

## Fiscal (tax)

Visitor spending, visitor supported jobs, and business sales generated \$7.3 billion in governmental revenues.

Taxes of \$7.3 billion were directly and indirectly generated by tourism in 2019.

State and local taxes alone tallied \$3.6 billion in 2019.

Each household in Ohio would need to be taxed an additional \$691 per year to replace the traveler taxes received by state and local governments.

### Fiscal (tax) impacts

Amounts in millions of current dollars				2019	2015-2019
	2017	2018	2019	growth	CAGR
<b>Total tax revenues</b>	<b>\$6,666</b>	<b>\$6,991</b>	<b>\$7,253</b>	<b>3.7%</b>	<b>3.9%</b>
<b>Federal</b>	<b>\$3,315</b>	<b>\$3,533</b>	<b>\$3,650</b>	<b>3.3%</b>	<b>4.4%</b>
Personal income	\$1,016	\$1,082	\$1,119	3.4%	4.5%
Corporate	\$578	\$596	\$613	2.9%	2.7%
Indirect business	\$308	\$348	\$360	3.4%	5.3%
Social insurance	\$1,413	\$1,507	\$1,558	3.4%	4.7%
<b>State and Local</b>	<b>\$3,351</b>	<b>\$3,458</b>	<b>\$3,603</b>	<b>4.2%</b>	<b>3.5%</b>
Sales	\$1,186	\$1,241	\$1,307	5.3%	4.4%
Bed tax	\$215	\$228	\$239	4.7%	4.2%
Personal income	\$30	\$32	\$33	5.3%	3.8%
Corporate	\$470	\$459	\$472	2.9%	0.7%
Social insurance	\$72	\$73	\$76	3.4%	3.0%
Excise and fees	\$88	\$91	\$93	2.9%	2.7%
Property	\$814	\$844	\$875	3.7%	3.7%

Source: Tourism Economics

# REGIONAL SUMMARY

# REGIONAL SUMMARY

## Business sales by region

Cleveland (Northeast), Columbus (Central), and Cincinnati (Southwest), are key destinations and influence the distribution of the tourism economy across Ohio.

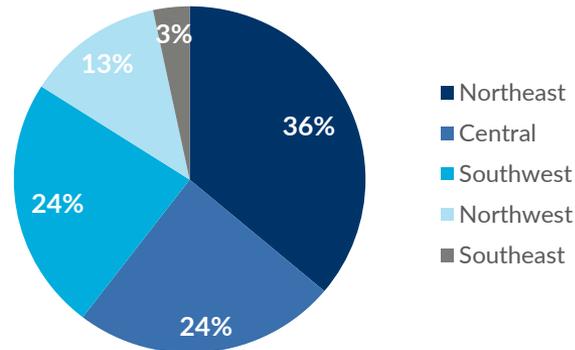
### Tourism business sales by region

Dollar amounts in millions of USD	Direct sales	Total sales
<b>Total</b>	<b>\$38,257.3</b>	<b>\$58,146.9</b>
<b>Region</b>		
Northeast	\$13,844.9	\$21,003.1
Central	\$9,311.2	\$14,120.0
Southwest	\$9,043.4	\$13,738.8
Northwest	\$4,806.0	\$7,339.9
Southeast	\$1,251.8	\$1,945.1

Source: Tourism Economics

### Tourism business sales by region

Percent of state total, %



# REGIONAL SUMMARY

## Business sales by region

Cleveland (Northeast), Columbus (Central), and Cincinnati (Southwest), are key destinations and influence the distribution of the tourism economy across Ohio.

### Percent change in business sales by region

	2016	2017	2018	2019	CAGR 2015-2019
<b>Total</b>	<b>3.6%</b>	<b>3.6%</b>	<b>4.6%</b>	<b>4.0%</b>	<b>3.9%</b>
<b>Region</b>					
Northeast	3.7%	3.0%	5.0%	1.5%	3.3%
Central	3.8%	4.6%	3.5%	5.7%	4.4%
Southwest	3.8%	3.7%	3.9%	5.8%	4.3%
Northwest	3.5%	3.2%	6.5%	5.9%	4.8%
Southeast	0.5%	1.8%	6.0%	1.5%	2.4%

Source: Tourism Economics

### Direct business sales by region

Amounts expressed in millions of current dollars

	2015	2016	2017	2018	2019
<b>Total</b>	<b>\$32,776.3</b>	<b>\$33,956.2</b>	<b>\$35,162.3</b>	<b>\$36,777.8</b>	<b>\$38,257.3</b>
<b>Region</b>					
Northeast	\$12,167.4	\$12,617.1	\$12,999.4	\$13,646.0	\$13,844.9
Central	\$7,836.5	\$8,130.4	\$8,508.0	\$8,809.9	\$9,311.2
Southwest	\$7,648.8	\$7,939.0	\$8,231.0	\$8,548.9	\$9,043.4
Northwest	\$3,986.4	\$4,127.2	\$4,261.2	\$4,540.2	\$4,806.0
Southeast	\$1,137.2	\$1,142.5	\$1,162.7	\$1,232.8	\$1,251.8

# REGIONAL SUMMARY

## Employment by region

The regional distribution of Ohio's tourism employment follows that of industry sales. Most employment is concentrated in the Northeast, Central, and Southwest regions.

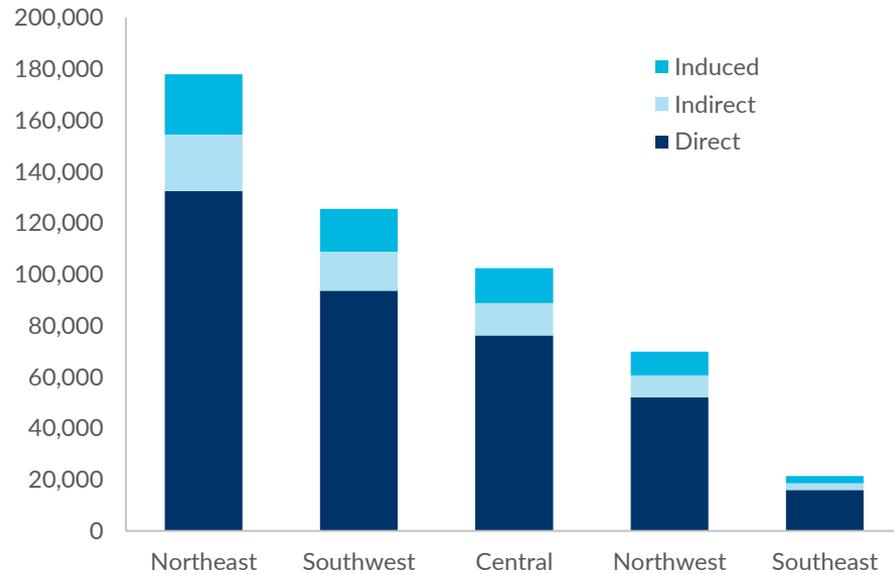
### Tourism employment by region

	Direct jobs	Indirect jobs	Induced jobs	Total jobs
<b>Total</b>	<b>370,268</b>	<b>61,180</b>	<b>65,865</b>	<b>497,313</b>
<b>Region</b>				
Northwest	131,717	21,837	23,414	176,968
Central	93,918	15,366	16,741	126,024
Southeast	76,492	12,681	13,597	102,770
Northeast	52,179	8,650	9,275	70,105
Southwest	15,961	2,646	2,837	21,445

Source: Tourism Economics

### Tourism employment by region

Amounts in number of jobs



# REGIONAL SUMMARY

## Wages by region

Tourism generates significant income for workers in the industry, a total of \$14.5 billion across all the regions of Ohio.

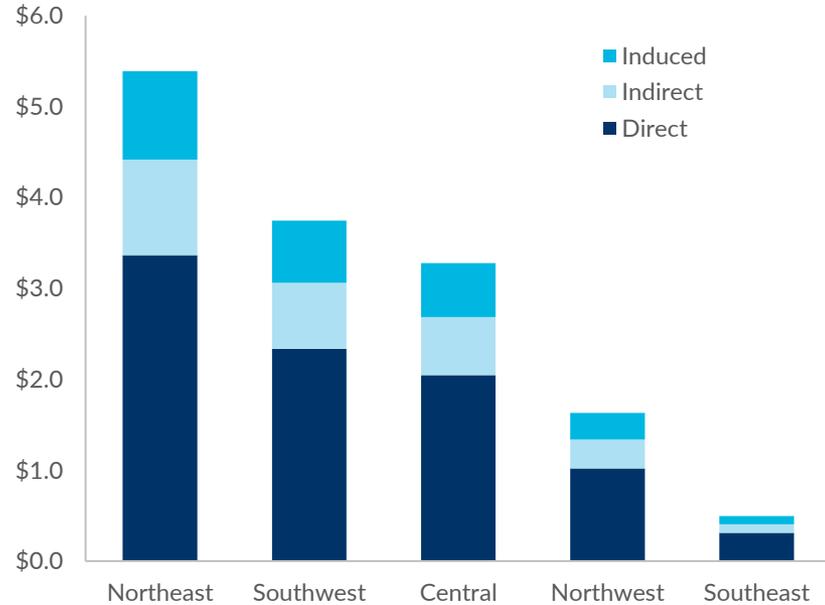
### Tourism wages by region

Dollar amounts in millions of USD	Direct wages	Indirect wages	Induced wages	Total wages
<b>Total</b>	<b>\$9,078.2</b>	<b>\$2,827.7</b>	<b>\$2,635.0</b>	<b>\$14,540.9</b>
<b>Region</b>				
Northwest	\$3,342.5	\$1,041.5	\$967.8	\$5,351.8
Central	\$2,345.5	\$729.8	\$685.6	\$3,760.9
Southeast	\$2,055.8	\$640.6	\$595.3	\$3,291.7
Northeast	\$1,022.8	\$318.7	\$296.2	\$1,637.7
Southwest	\$311.5	\$97.1	\$90.2	\$498.8

Source: Tourism Economics

### Tourism wages by region

Amounts in billions of nominal dollars



# APPALACHIAN REGION IMPACTS

# ECONOMIC IMPACTS

## Direct sales in the region

Appalachian Region visitor spending increased 1.7% in 2019, slightly under the state overall.

### Direct sales trends

	2017	2018	2019
<b>Region direct sales trends:</b>			
Sales volume (\$mils)	\$3,611.3	\$3,746.1	\$3,808.1
Sales growth, % change	4.0%	3.7%	1.7%
<b>State direct sales trends:</b>			
Ohio sales growth, % change	3.5%	4.6%	4.0%

Source: Tourism Economics

# ECONOMIC IMPACTS

## Tourism impact in region

Appalachian Region business sales totaled \$5.9 billion in 2019, and supported 60,173 jobs within the region.

### Total tourism impact (Part 1)

Dollar amounts in millions of USD	Total sales	Total jobs	Total income	Total tax revenue
<b>Region total</b>	<b>\$5,862.8</b>	<b>60,173</b>	<b>\$1,369.2</b>	<b>\$713.8</b>
<b>County</b>				
Adams	\$45.6	644	\$16.1	\$5.6
Ashtabula	\$520.7	3,536	\$80.3	\$60.8
Athens	\$189.1	2,190	\$52.2	\$23.9
Belmont	\$246.5	2,394	\$58.0	\$30.6
Brown	\$58.6	874	\$18.3	\$7.2
Carroll	\$80.7	682	\$16.2	\$9.4
Clermont	\$622.2	5,807	\$147.6	\$74.9
Columbiana	\$278.6	2,600	\$51.1	\$32.1
Coshocton	\$58.3	710	\$14.6	\$6.9
Gallia	\$73.1	872	\$21.4	\$9.1
Guernsey	\$173.6	1,606	\$46.2	\$22.3
Harrison	\$18.9	213	\$2.6	\$1.9
Highland	\$44.2	885	\$13.3	\$5.3
Hocking	\$161.7	1,139	\$31.1	\$21.0
Holmes	\$243.6	1,998	\$46.8	\$29.9

Source: Tourism Economics

# ECONOMIC IMPACTS

## Tourism impact in region

Income benefits from tourism totaled \$1.4 billion in 2019, and tourism supported \$713.8 million in tax revenues.

### Total tourism impact (Part 2)

Dollar amounts in millions of USD	Total sales	Total jobs	Total income	Total tax revenue
<b>Region total</b>	<b>\$5,862.8</b>	<b>60,173</b>	<b>\$1,369.2</b>	<b>\$713.8</b>
<b>County</b>				
Jackson	\$47.1	955	\$15.8	\$5.9
Jefferson	\$237.3	2,340	\$53.0	\$28.3
Lawrence	\$50.1	940	\$23.2	\$6.8
Mahoning	\$852.2	9,098	\$204.9	\$105.0
Meigs	\$17.2	310	\$5.0	\$1.8
Monroe	\$9.6	132	\$2.0	\$0.9
Morgan	\$21.9	176	\$2.2	\$2.2
Muskingum	\$238.1	2,958	\$67.8	\$30.2
Noble	\$6.8	174	\$2.2	\$0.7
Perry	\$13.7	310	\$5.3	\$1.5
Pike	\$31.7	578	\$10.4	\$3.9
Ross	\$191.4	2,583	\$59.5	\$24.6
Scioto	\$197.7	2,026	\$47.5	\$23.8
Trumbull	\$567.9	6,264	\$139.6	\$69.8
Tuscarawas	\$288.9	3,075	\$66.2	\$35.3
Vinton	\$27.7	219	\$3.9	\$3.0
Washington	\$248.3	1,883	\$45.1	\$29.2

Source: Tourism Economics

# ECONOMIC IMPACTS

## Tourism impact in region

Mahoning County accounted for most tourism sales in the region.

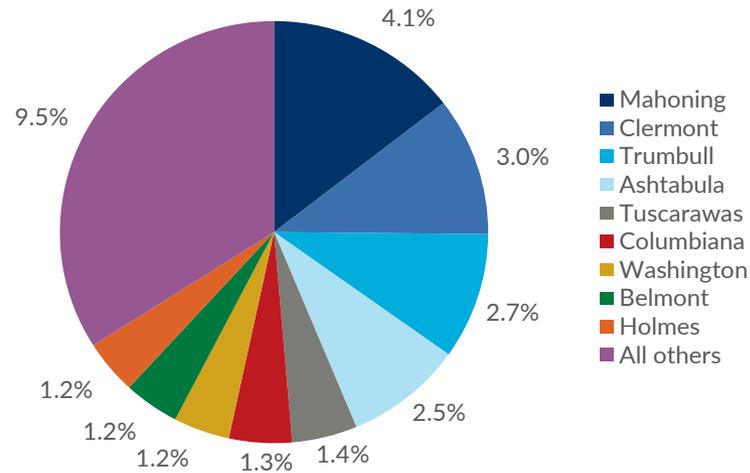
### Top tourism business sales by county

Dollar amounts in millions of USD	Direct sales	Total sales
<b>Region total</b>	<b>\$3,808.1</b>	<b>\$5,862.8</b>
<b>County</b>		
Mahoning	\$561.7	\$852.2
Clermont	\$402.6	\$622.2
Trumbull	\$373.6	\$567.9
Ashtabula	\$342.6	\$520.7
Tuscarawas	\$189.8	\$288.9
Columbiana	\$181.7	\$278.6
Washington	\$162.3	\$248.3
Belmont	\$160.9	\$246.5
Holmes	\$158.4	\$243.6
All others	\$1,274.6	\$1,994.0

Source: Tourism Economics

### Total tourism business sales impacts by county

Amounts expressed as percent of total sales



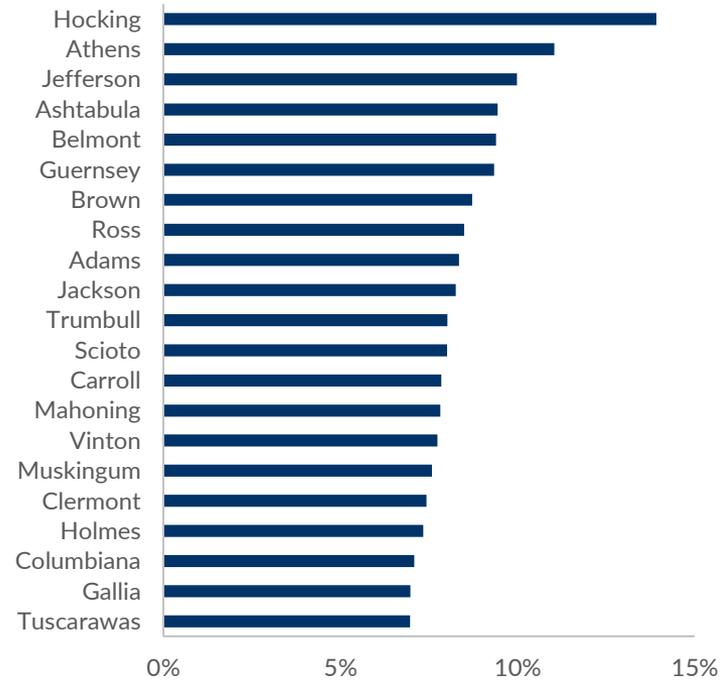
# ECONOMIC IMPACTS

## Employment by county

Tourism-driven jobs account for a higher share of the total in Hocking county

### Tourism share of employment by county

Amounts expressed as total tourism share of county employment



Source: Tourism Economics

# ECONOMIC IMPACTS

## Business sales impacts by industry

Tourism generated \$5.9 billion in total business sales in Appalachian Region.

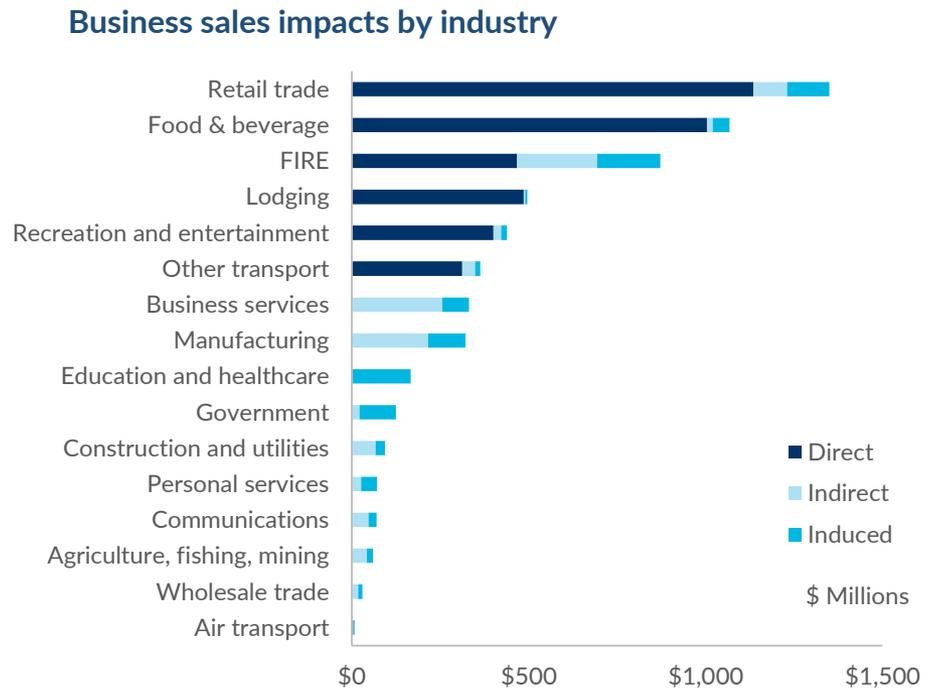
### Business sales impacts by industry

Amounts in millions of current dollars	Direct sales	Indirect sales	Induced sales	Total sales
<b>Total, all industries</b>	<b>\$3,808.1</b>	<b>\$1,100.0</b>	<b>\$954.7</b>	<b>\$5,862.8</b>
<b>By industry</b>				
Retail trade	\$1,135.1	\$95.1	\$119.0	\$1,349.3
Food & beverage	\$1,003.8	\$15.9	\$47.5	\$1,067.2
FIRE	\$466.8	\$226.3	\$178.7	\$871.9
Lodging	\$485.6	\$5.2	\$4.8	\$495.7
Recreation and entertainment	\$400.1	\$22.1	\$16.7	\$438.9
Other transport	\$312.1	\$36.8	\$14.0	\$362.9
Business services	\$0.0	\$256.0	\$75.3	\$331.3
Manufacturing	\$0.0	\$215.5	\$105.4	\$320.8
Education and healthcare	\$0.0	\$0.9	\$166.0	\$166.9
Government	\$0.0	\$22.2	\$102.8	\$125.0
Construction and utilities	\$0.0	\$67.1	\$26.7	\$93.8
Personal services	\$0.0	\$26.5	\$44.5	\$71.1
Communications	\$0.0	\$47.4	\$22.4	\$69.8
Agriculture, fishing, mining	\$0.0	\$42.8	\$17.2	\$60.0
Wholesale trade	\$0.0	\$17.9	\$11.9	\$29.8
Air transport	\$4.5	\$2.2	\$1.8	\$8.6

Source: Tourism Economics

# ECONOMIC IMPACTS

## Business sales impacts by industry



Source: Tourism Economics

# ECONOMIC IMPACTS

## Employment impacts by industry

Tourism generated 60,173 jobs in Appalachian Region.

### Employment impacts by industry

Amounts in number of jobs	Direct jobs	Indirect jobs	Induced jobs	Total jobs
<b>Total, all industries</b>	<b>44,905</b>	<b>7,240</b>	<b>8,028</b>	<b>60,173</b>
<b>By industry</b>				
Food & beverage	20,528	329	942	21,799
Retail trade	8,453	355	1,593	10,401
Other transport	5,002	671	253	5,926
Lodging	5,785	72	65	5,922
Recreation and entertainment	4,810	470	271	5,551
Business services	-	2,384	743	3,127
FIRE	327	1,187	718	2,232
Education and healthcare	-	24	2,129	2,153
Personal services	-	292	704	996
Manufacturing	-	470	214	684
Agriculture, fishing, mining	-	333	130	463
Construction and utilities	-	237	56	293
Communications	-	210	82	292
Government	-	120	66	186
Wholesale trade	-	79	54	133
Air transport	-	7	7	14

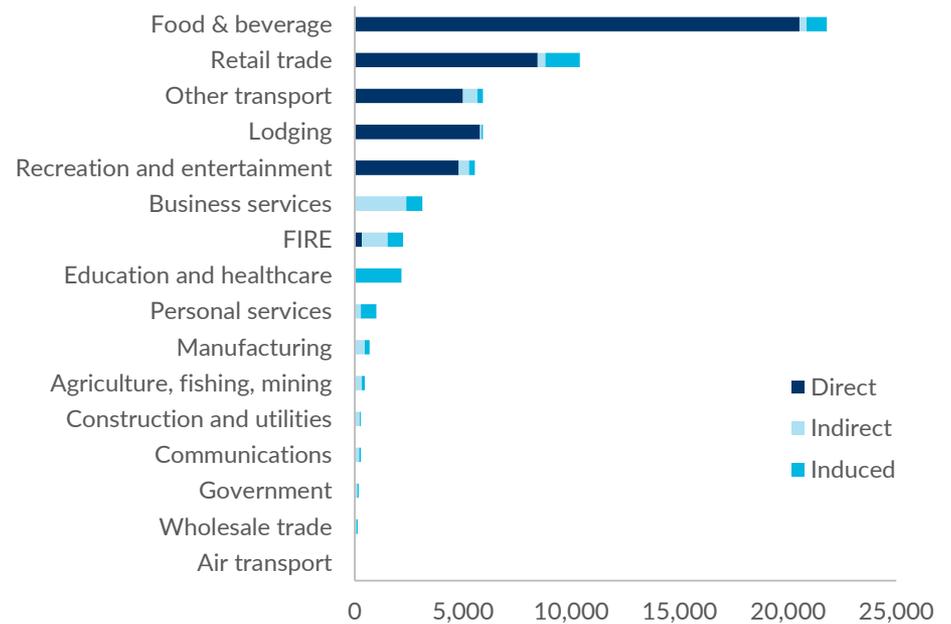
Source: Tourism Economics

# ECONOMIC IMPACTS

## Employment impacts by industry

Food and beverage, retail, lodging, and other transport represented the industries with the most direct employment from tourism in the region.

### Employment impacts by industry



Source: Tourism Economics

# ECONOMIC IMPACTS

## Personal income impacts by industry

Tourism generated \$1.4 billion in income in the region.

### Personal income impacts by industry

Amounts in millions of current dollars	Direct income	Indirect income	Induced income	Total income
<b>Total, all industries</b>	<b>\$851.8</b>	<b>\$263.7</b>	<b>\$252.5</b>	<b>\$1,367.9</b>
<b>By industry</b>				
Food & beverage	\$371.6	\$5.1	\$14.4	\$391.1
Retail trade	\$165.4	\$9.1	\$38.2	\$212.7
Other transport	\$126.5	\$27.3	\$10.1	\$163.9
Business services	\$0.0	\$97.6	\$30.2	\$127.8
Lodging	\$119.5	\$1.7	\$1.4	\$122.5
Education and healthcare	\$0.0	\$0.4	\$78.1	\$78.6
Recreation and entertainment	\$61.7	\$6.9	\$5.4	\$74.0
FIRE	\$7.1	\$36.8	\$27.0	\$70.9
Manufacturing	\$0.0	\$24.3	\$11.6	\$35.9
Personal services	\$0.0	\$8.7	\$15.9	\$24.5
Construction and utilities	\$0.0	\$17.5	\$6.4	\$23.9
Communications	\$0.0	\$11.0	\$4.4	\$15.4
Agriculture, fishing, mining	\$0.0	\$6.7	\$3.1	\$9.8
Government	\$0.0	\$6.3	\$3.0	\$9.2
Wholesale trade	\$0.0	\$4.3	\$3.3	\$7.7

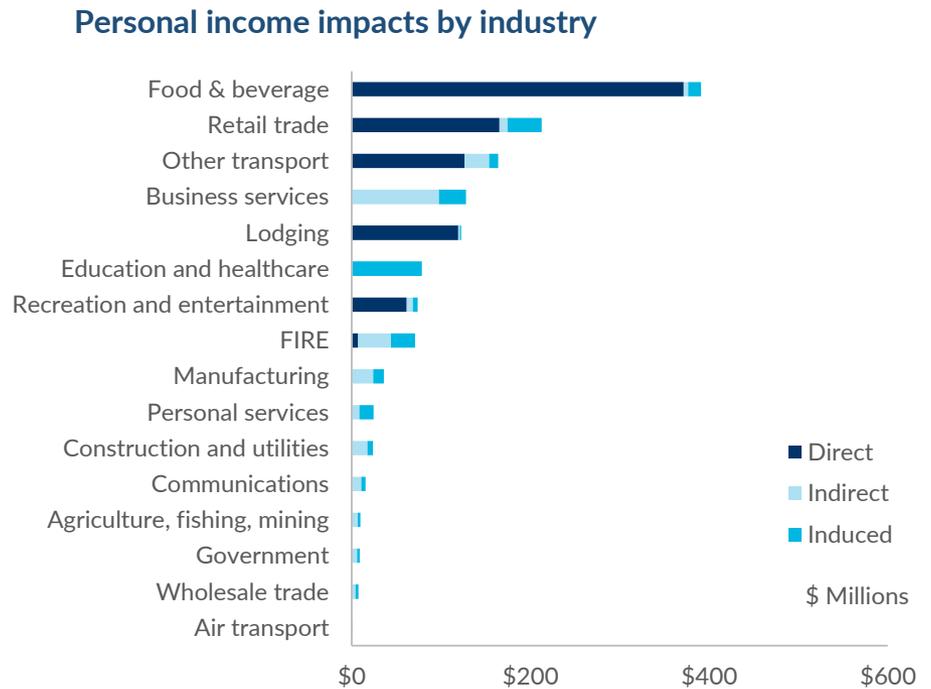
Source: Tourism Economics

# ECONOMIC IMPACTS

## Personal income impacts by industry

Food and beverage, other transport, and retail had the largest direct personal income support by tourism.

Other industries, such as business services, education and healthcare, were supported mainly by indirect and induced means.



Source: Tourism Economics

# ECONOMIC IMPACTS

## Fiscal impacts

Tourism generated \$713.8 million in tax revenues, including \$353.4 million in state and local revenues.

Tourism tax revenues saved households in the region an average of \$392 per household across all region counties in 2019.

### Tourism-generated tax revenues in 2019

Amounts in nominal dollars	Taxes generated
<b>Total tax revenues</b>	<b>\$713,798,104</b>
Federal Taxes	\$360,416,280
State Taxes	\$209,647,020
Local Taxes	\$143,734,804
Average State/Local Tax Savings Per Household	\$392

Source: Tourism Economics

# ABOUT TOURISM ECONOMICS

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

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

Tourism Economics operates out of regional headquarters in Philadelphia and Oxford, with offices in Belfast, Buenos Aires, Dubai, Frankfurt, and Ontario.

Oxford Economics is one of the world's foremost independent global advisory firms, providing reports, forecasts and analytical tools on 200 countries, 100 industrial sectors and over 3,000 cities. Our best-of-class global economic and industry models and analytical tools give us an unparalleled ability to forecast external market trends and assess their economic, social and business impact. Headquartered in Oxford, England, with regional centers in London, New York, and Singapore, Oxford Economics has offices across the globe in Belfast, Chicago, Dubai, Miami, Milan, Paris, Philadelphia, San Francisco, and Washington DC, we employ over 250 full-time staff, including 150 professional economists, industry experts and business editors—one of the largest teams of macroeconomists and thought leadership specialists.

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