

ECONOMIC IMPACT OF TOURISM IN JEFFERSON COUNTY, OHIO 2020

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, as well as total economic impacts, including employment, household income, and tax impacts in the broader economy.

The analysis draws 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
- STR: Lodging performance data, including room demand, room rates, occupancy, and room revenue
- Tax collections: Lodging and restaurant tax receipts
- 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

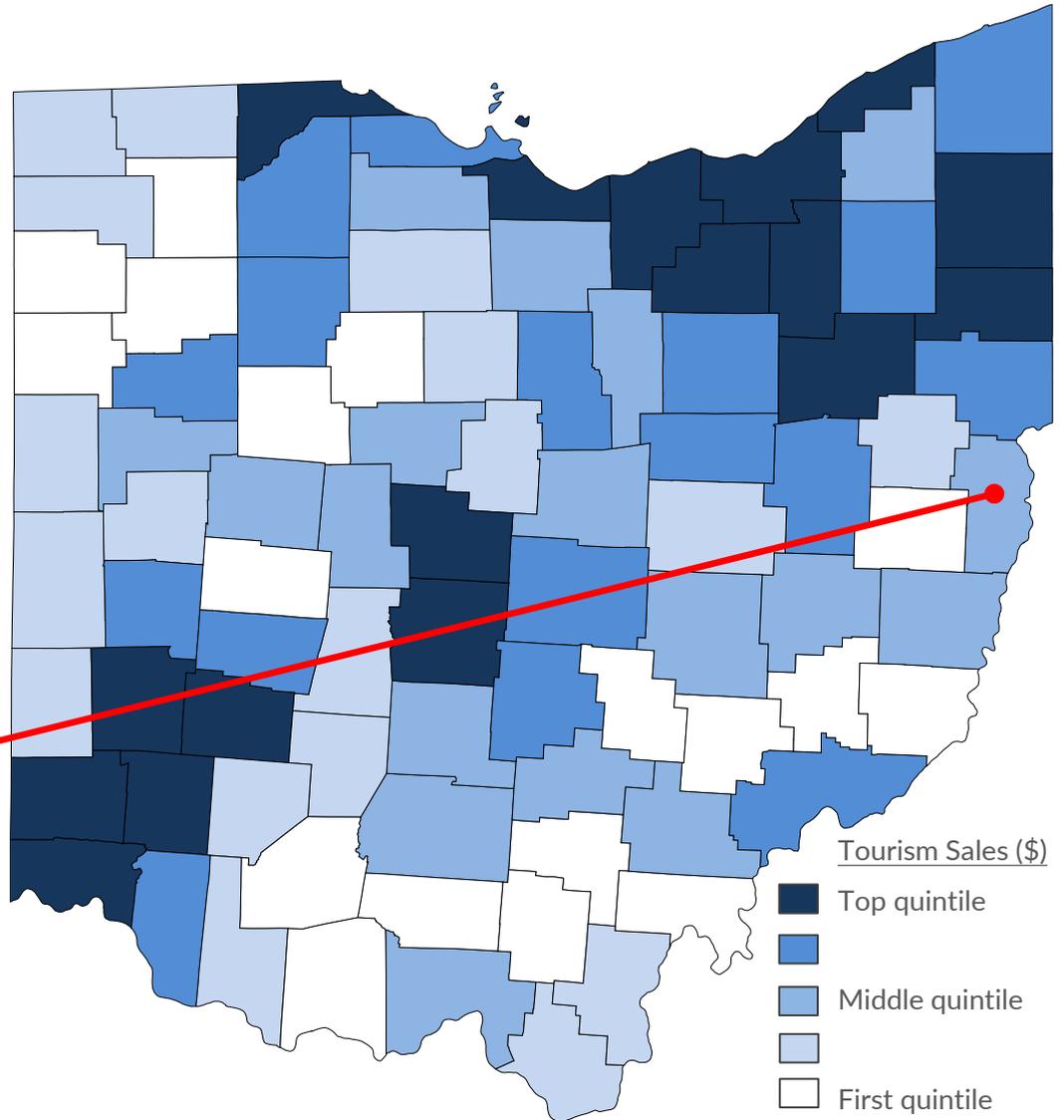
Jefferson County

Jefferson County, Ohio

Tourism impact

Sales	\$204.4 million
Wages	\$49.3 million
Taxes	\$27 million
Employment	2,170

Jefferson County



KEY FINDINGS

Jefferson County

Growth in visitation, spending, and employment

Visitor spending was severely impacted by the COVID-19 pandemic in 2020. Despite lower visitor spending in Ohio in 2020 versus a year earlier, tourism remains an integral part of the Jefferson County economy and continues to be a key driver of business sales, employment, and tax revenue.

Approximately 9.8% of all private jobs in the County were sustained by tourism.



Visitor Spending

Visitors to Jefferson County spent \$124 million in 2020, which generated \$204 million in business sales when including indirect impacts.



Employment Generator

A total of 2,170 jobs were sustained by visitors to Jefferson County in 2020. This included 1,591 direct and 579 indirect and induced jobs.



Fiscal Contributions

Tourism in Jefferson County generated \$27 million in tax revenues in 2020, with \$12.9 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 pandemic affected 2020 visitor activity



Visitor Spending

In 2020, 200.9 million visitors spent \$28.9 billion in Ohio.



Employment Supporter

Employment supported by visitor spending tallied 319,700 jobs in the state.



Pandemic affects results

Visitation declined 11% and visitor spending dropped 25% in 2020 as the pandemic affected travel.



Fiscal Contributions

Visitors generated \$3.1 billion in state and local taxes, which is equivalent to \$599 in tax savings for every household in Ohio.

VISITATION AND SPENDING HIGHLIGHTS

The pandemic affected visitor activity in 2020

Shutdowns cut visitation and spending, but Ohio tourism still brought in visitors and their money.

The 2020 visitors and visitor spending results were significantly impacted by the pandemic. The limitations and restrictions on mobility, combined with the economic disruptions, hit the travel industry hard.

However, travel still occurred in 2020 – it was just a lot different than previous years. Travel leaned toward day trips. With travel limited, overnight visitors stayed longer when they did travel. Travel party size grew as more families traveled together while solo business travel declined.

While declines in 2020 were significant, the number of trips and associated spending that occurred in Ohio during the year was still noteworthy.



Despite declines, Ohio still welcomed 200.9 million visitors in 2020

Visitation declines were smaller for in-state travelers versus those coming from outside the state.



Visitors spent \$28.9 billion in Ohio in 2020

The Covid-19 pandemic cut 25% from 2019 visitor spending levels.



Retail spending holds its own

While both prices and spending opportunities fell in other sectors as a result of the pandemic, in-state residents demand for retail goods helped retail spending lose less.

VISITATION TRENDS

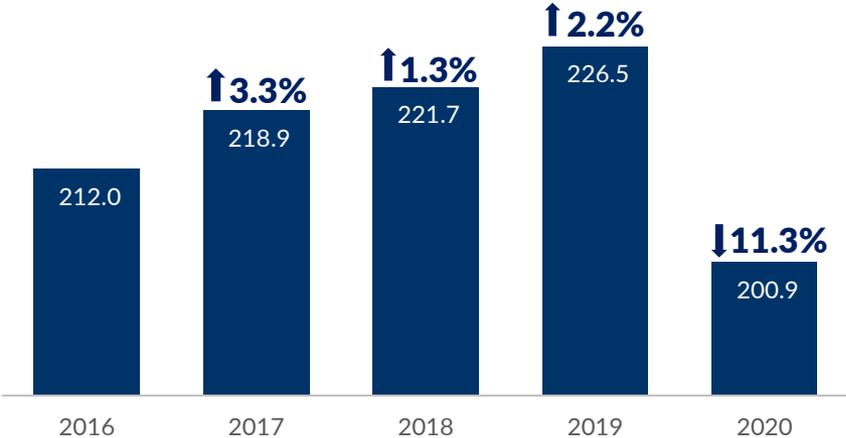
Total visitor count

Visitation fell by 25.7 million visitors in 2020, a decline of 11.3%. Even with the decline, Ohio welcomed 200.9 million person-trips during the year.

Visitation losses were higher for international and overnight travelers compared to day travelers.

Ohio visitor levels and annual growth

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



Source: Longwoods International, Tourism Economics

VISITOR SPENDING TRENDS

Total visitor spending

Visitor spending in Ohio declined 24.5% in 2020, falling to \$28.9 billion.

The pandemic and its various travel restrictions and changes in traveler behavior cut \$9.4 billion from 2019 visitor spending levels.

Prices in key traveler sectors –gasoline and lodging, fell, exacerbating the decline in spending.

Ohio total visitor spending

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



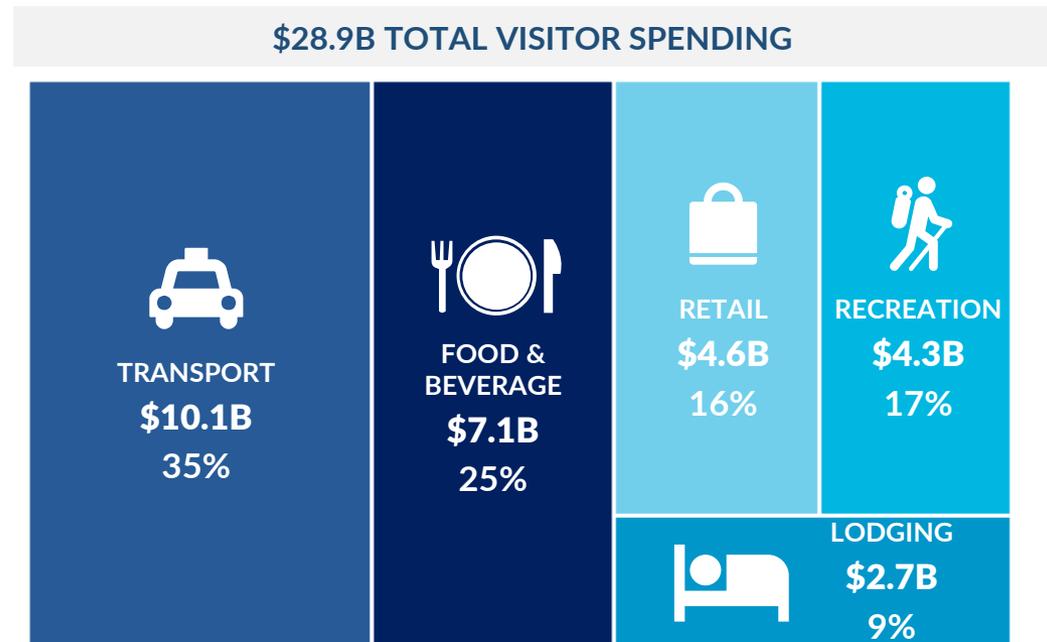
Source: Longwoods International, Tourism Economics

SPENDING DETAILS

Spending by category, 2020

Transport and food & beverage spending were the top spending categories by visitors in 2020.

In 2020, visitors to Ohio spent \$28.9 billion, including \$10.1 billion on air and local transportation, \$7.1 billion on food and beverage, \$4.6 billion on retail, \$4.3 billion on recreation, and \$2.7 billion on lodging.



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

Source: Longwoods International, Tourism Economics

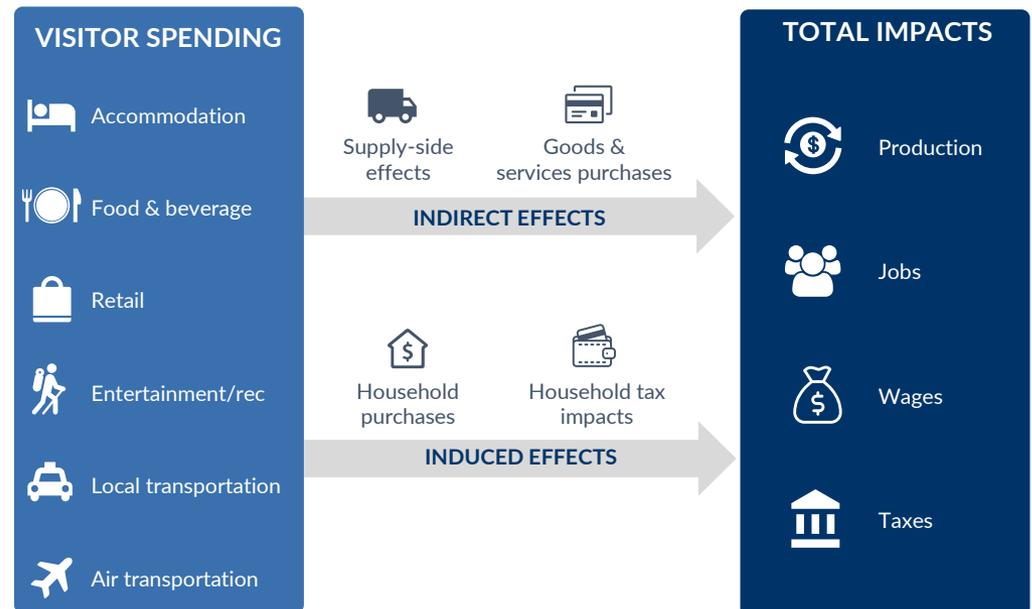
ECONOMIC IMPACTS

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

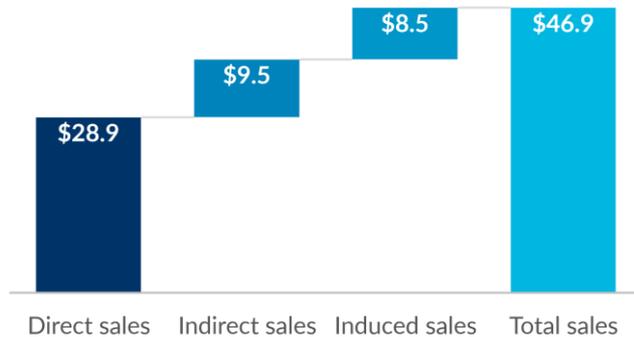


TOTAL BUSINESS SALES IMPACTS

Business sales impacts by industry

Visitors and tourism businesses spent \$28.9 billion in Ohio in 2020. This supported a total of \$46.9 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
Total, all industries	\$28,880	\$9,503	\$8,512	\$46,896
By industry				
Retail trade	\$5,641	\$258	\$1,049	\$6,948
Food & beverage	\$6,106	\$94	\$279	\$6,480
Gasoline stations	\$5,887	\$17	\$65	\$5,970
FIRE	\$1,245	\$2,161	\$1,588	\$4,994
Recreation and entertainment	\$3,996	\$156	\$118	\$4,270
Business services	\$87	\$2,419	\$677	\$3,183
Other transport	\$2,486	\$467	\$178	\$3,131
Manufacturing		\$1,878	\$918	\$2,796
Lodging	\$2,692	\$29	\$26	\$2,747
Education and healthcare		\$8	\$1,512	\$1,520
Government		\$217	\$1,006	\$1,223
Personal services	\$261	\$222	\$373	\$855
Construction and utilities		\$561	\$228	\$789
Communications		\$496	\$234	\$730
Air transport	\$480	\$23	\$19	\$521
Agriculture, fishing, mining		\$334	\$134	\$469
Wholesale trade		\$162	\$107	\$269

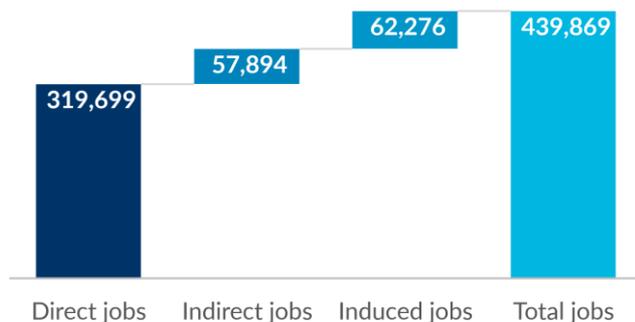
Source: Tourism Economics

TOTAL EMPLOYMENT IMPACTS

Employment impacts by industry

Tourism supported a total of 439,869 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
Total, all industries	319,699	57,894	62,276	439,869
By industry				
Food & beverage	142,830	2,564	7,138	152,532
Recreation and entertainment	50,820	2,899	2,016	55,736
Retail trade	33,537	2,468	11,797	47,802
Other transport	37,419	6,127	2,247	45,793
Lodging	30,514	422	366	31,302
Business services	138	19,944	6,050	26,132
FIRE	7,318	9,703	5,708	22,729
Education and healthcare		186	16,694	16,880
Gasoline stations	11,430	175	650	12,255
Personal services	1,878	2,036	4,984	8,898
Manufacturing		3,696	1,642	5,337
Air transport	3,814	61	60	3,935
Agriculture, fishing, mining		2,437	930	3,367
Construction and utilities		1,954	452	2,406
Communications		1,624	615	2,239
Government		960	505	1,465
Wholesale trade		639	422	1,060

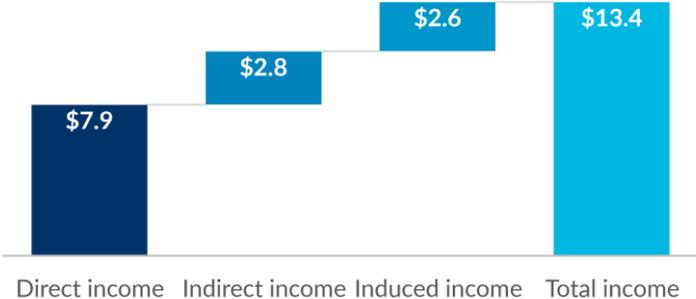
Source: Tourism Economics

TOTAL INCOME IMPACTS

Personal income impacts by industry

Tourism generated \$7.9 billion in direct income and \$13.4 billion when indirect and induced impacts are considered. These wages and benefits are paid to people whose jobs are located in Ohio.

Summary personal income impacts (\$ billions)



Personal income impacts by industry

Amounts in millions of current dollars	Direct income	Indirect income	Induced income	Total income
Total, all industries	\$7,949	\$2,807	\$2,599	\$13,355
By industry				
Food & beverage	\$2,847	\$51	\$141	\$3,039
Recreation and entertainment	\$1,466	\$59	\$45	\$1,570
Other transport	\$1,078	\$305	\$110	\$1,493
Retail trade	\$989	\$91	\$374	\$1,454
Business services	\$9	\$1,038	\$313	\$1,360
FIRE	\$219	\$410	\$293	\$922
Education and healthcare		\$5	\$802	\$807
Lodging	\$610	\$9	\$7	\$625
Gasoline stations	\$344	\$6	\$20	\$370
Manufacturing		\$248	\$116	\$363
Air transport	\$338	\$7	\$7	\$352
Personal services	\$51	\$91	\$162	\$304
Construction and utilities		\$192	\$68	\$260
Communications		\$120	\$47	\$167
Government		\$65	\$30	\$95
Agriculture, fishing, mining		\$65	\$29	\$95
Wholesale trade		\$45	\$34	\$79

Source: Tourism Economics

TOTAL TAX IMPACTS

Fiscal (tax)

Visitor spending, visitor supported jobs, and business sales generated \$6.5 billion in governmental revenues.

Taxes of \$6.5 billion were directly and indirectly generated by tourism in 2020.

State and local taxes alone tallied \$3.1 billion in 2020.

Each household in Ohio would need to be taxed an additional \$599 per year to replace the traveler taxes received by state and local governments.

Fiscal (tax) impacts

Amounts in millions of current dollars				2020	2016-2020
	2018	2019	2020	growth	CAGR
Total tax revenues	\$6,991	\$7,253	\$6,472	-10.8%	0.7%
Federal	\$3,533	\$3,650	\$3,339	-8.5%	1.6%
Personal income	\$1,082	\$1,119	\$1,041	-7.0%	2.1%
Corporate	\$596	\$613	\$513	-16.3%	-1.5%
Indirect business	\$348	\$360	\$335	-7.0%	2.8%
Social insurance	\$1,507	\$1,558	\$1,450	-7.0%	2.2%
State and Local	\$3,458	\$3,603	\$3,133	-13.1%	-0.2%
Sales	\$1,241	\$1,307	\$1,061	-18.8%	-0.8%
Bed tax	\$228	\$239	\$130	-45.7%	-8.1%
Admissions	\$32	\$33	\$27	-18.8%	-1.2%
Personal income	\$405	\$419	\$390	-7.0%	1.3%
Corporate	\$459	\$472	\$395	-16.3%	-3.5%
Social insurance	\$73	\$76	\$71	-7.0%	0.6%
Excise and fees	\$91	\$93	\$78	-16.3%	-1.6%
Property	\$844	\$875	\$908	3.7%	3.7%
Other	\$85	\$87	\$73	-16.3%	-1.6%

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.

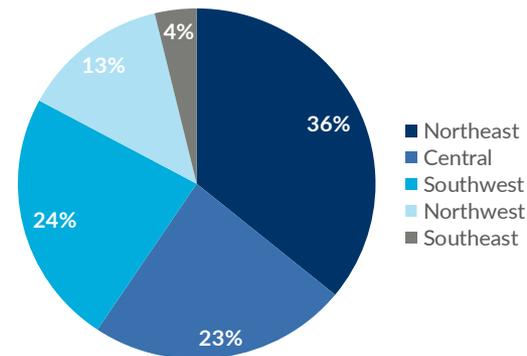
Tourism business sales by region

Dollar amounts in millions of USD	Direct sales	Total sales
Total	\$28,880.1	\$46,895.5
Region		
Northeast	\$10,396.2	\$16,843.2
Central	\$6,788.4	\$10,994.9
Southwest	\$6,793.0	\$11,024.0
Northwest	\$3,836.2	\$6,259.7
Southeast	\$1,066.4	\$1,773.7

Source: Tourism Economics

Tourism business sales by region

Percent of state total, %



REGIONAL SUMMARY

Business sales by region

Direct visitor spending contracted in 2020 across all regions of the state.

Percent change in direct business sales by region

	2017	2018	2019	2020	CAGR 2016-2020
Total	3.6%	4.6%	4.0%	-24.5%	-4.0%
Region					
Northeast	3.0%	5.0%	1.5%	-24.9%	-4.7%
Central	4.6%	3.5%	5.7%	-27.1%	-4.4%
Southwest	3.7%	3.9%	5.8%	-24.9%	-3.8%
Northwest	3.2%	6.5%	5.9%	-20.2%	-1.8%
Southeast	1.8%	6.0%	1.5%	-14.8%	-1.7%

Source: Tourism Economics

Direct business sales by region

Amounts expressed in millions of current dollars

	2016	2017	2018	2019	2020
Total	\$33,956	\$35,162	\$36,778	\$38,257	\$28,880
Region					
Northeast	\$12,617	\$12,999	\$13,646	\$13,845	\$10,396
Central	\$8,130	\$8,508	\$8,810	\$9,311	\$6,788
Southwest	\$7,939	\$8,231	\$8,549	\$9,043	\$6,793
Northwest	\$4,127	\$4,261	\$4,540	\$4,806	\$3,836
Southeast	\$1,142	\$1,163	\$1,233	\$1,252	\$1,066

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.

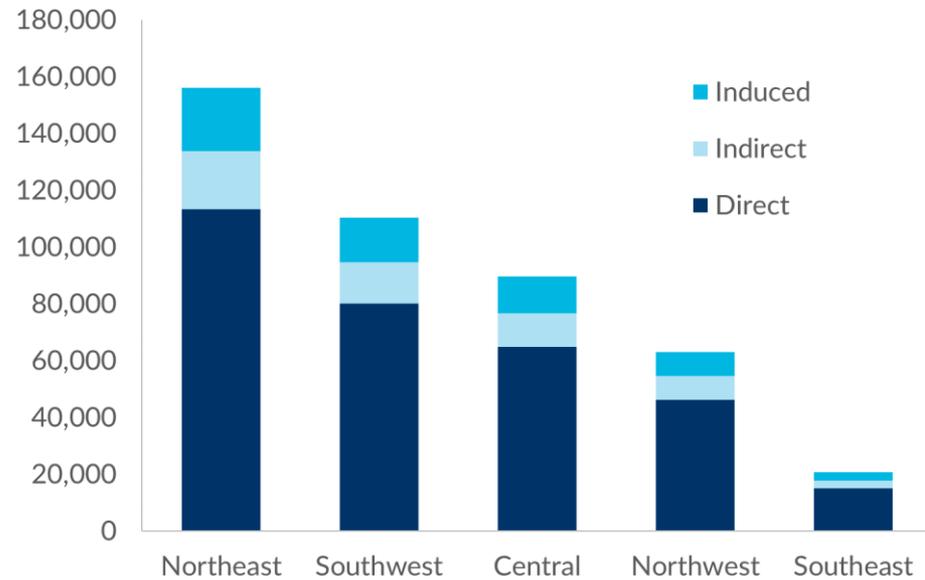
Tourism employment by region

	Direct jobs	Indirect jobs	Induced jobs	Total jobs
Total	319,699	57,894	62,276	439,869
Region				
Northwest	46,194	8,365	8,480	63,040
Central	64,892	11,751	13,012	89,656
Southeast	15,143	2,742	2,755	20,640
Northeast	113,355	20,527	22,328	156,211
Southwest	80,115	14,508	15,701	110,324

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 \$13.4 billion across all the regions of Ohio.

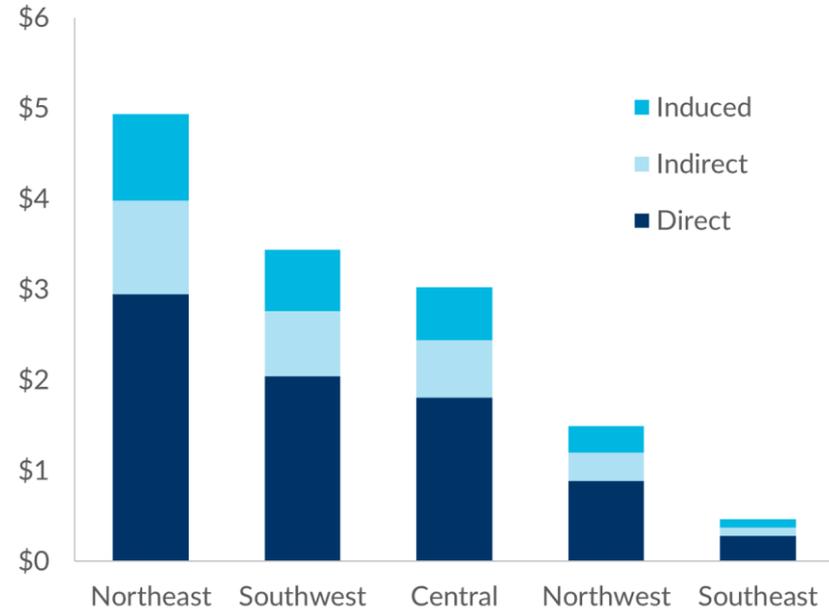
Tourism wages by region

Dollar amounts in millions of USD	Direct wages	Indirect wages	Induced wages	Total wages
Total	\$7,949.2	\$2,806.8	\$2,599.1	\$13,355.0
Region				
Northwest	\$884.0	\$316.3	\$292.0	\$1,492.3
Central	\$1,803.2	\$635.7	\$586.9	\$3,025.8
Southeast	\$276.8	\$96.3	\$88.9	\$462.1
Northeast	\$2,944.6	\$1,034.4	\$955.1	\$4,934.0
Southwest	\$2,040.6	\$724.1	\$676.1	\$3,440.8

Source: Tourism Economics

Tourism wages by region

Amounts in billions of nominal dollars



NORTHEAST OHIO IMPACT

NORTHEAST OHIO IMPACT

Total tourism impact

Visitor spending in Northeast Ohio generated \$16.8 billion in total sales, 156,211 jobs, \$4.9 billion in income, and \$2.3 billion in tax revenues.

Total tourism impacts

Dollar amounts in millions of USD	Total sales	Total jobs	Total income	Total tax revenue
Region total	\$16,843.2	156,211	\$4,934.0	\$2,329.4
County				
Ashland	\$182.8	1,633	\$36.5	\$23.8
Ashtabula	\$515.0	3,489	\$73.6	\$65.5
Carroll	\$65.9	578	\$14.0	\$8.4
Columbiana	\$256.6	2,341	\$49.2	\$32.7
Coshocton	\$53.4	678	\$13.5	\$6.9
Cuyahoga	\$7,086.5	57,451	\$2,558.0	\$1,021.2
Geauga	\$210.8	2,688	\$60.3	\$28.4
Harrison	\$15.9	164	\$2.6	\$1.8
Holmes	\$232.3	1,944	\$40.9	\$30.5
Jefferson	\$204.4	2,170	\$49.3	\$27.0
Lake	\$791.3	8,078	\$202.2	\$107.1
Lorain	\$582.5	8,135	\$197.8	\$82.2
Mahoning	\$761.5	8,729	\$190.8	\$103.3
Medina	\$526.7	6,355	\$159.1	\$72.6
Portage	\$502.9	4,570	\$109.3	\$66.5
Richland	\$320.8	4,531	\$95.2	\$44.2
Stark	\$1,513.6	12,402	\$301.8	\$197.5
Summit	\$1,932.4	18,221	\$522.7	\$264.5
Trumbull	\$552.8	6,527	\$133.2	\$74.3
Tuscarawas	\$313.5	2,900	\$61.8	\$40.9
Wayne	\$221.7	2,628	\$62.1	\$30.0

Source: Tourism Economics

NORTHEAST OHIO IMPACT

Business sales by county

Cuyahoga County accounted for most tourism sales in the region, although the County accounted for a lower share of sales in 2020 versus a year earlier.

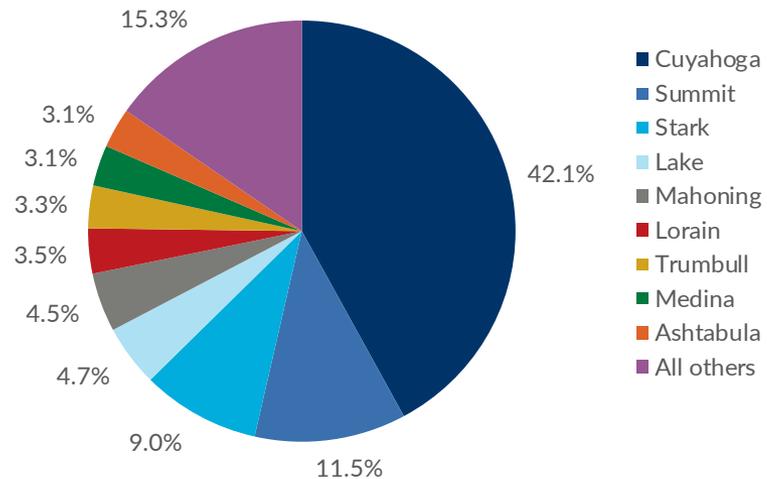
Top tourism business sales by county

Dollar amounts in millions of USD	Direct sales	Total sales
Region total	\$10,396.2	\$16,843.2
County		
Cuyahoga	\$4,388.9	\$7,086.5
Summit	\$1,195.8	\$1,932.4
Stark	\$936.1	\$1,513.6
Lake	\$488.5	\$791.3
Mahoning	\$470.1	\$761.5
Lorain	\$359.0	\$582.5
Trumbull	\$340.5	\$552.8
Medina	\$324.6	\$526.7
Ashtabula	\$317.3	\$515.0
All others	\$1,575.4	\$2,580.9

Source: Tourism Economics

Total tourism business sales impacts by county

Amounts expressed as percent of total sales



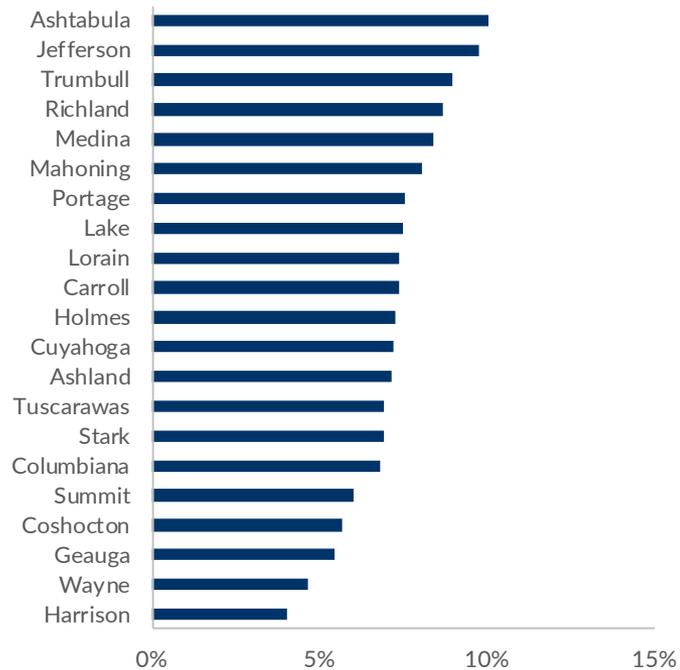
NORTHEAST OHIO IMPACT

Employment by county

Tourism-driven jobs account for a higher share of the total in Ashtabula County

Tourism share of employment by county

Amounts expressed as total tourism share of county employment



Source: Tourism Economics

NORTHEAST OHIO IMPACT

Employment by county

The greatest amount of tourism employment is in
Cuyahoga County

Tourism employment impacts by county

	Direct jobs	Indirect jobs	Induced jobs	Total jobs
Region total	113,355	20,527	22,328	156,211
County				
Ashland	1,198	217	217	1,633
Ashtabula	2,564	464	460	3,489
Carroll	424	77	77	578
Columbiana	1,720	311	311	2,341
Coshocton	499	90	89	678
Cuyahoga	41,055	7,435	8,961	57,451
Geauga	1,971	357	360	2,688
Harrison	121	22	21	164
Holmes	1,430	259	255	1,944
Jefferson	1,591	288	290	2,170
Lake	5,907	1,070	1,101	8,078
Lorain	5,952	1,078	1,105	8,135
Mahoning	6,408	1,160	1,161	8,729
Medina	4,646	841	867	6,355
Portage	3,346	606	617	4,570
Richland	3,329	603	599	4,531
Stark	9,076	1,644	1,683	12,402
Summit	13,264	2,402	2,555	18,221
Trumbull	4,798	869	860	6,527
Tuscarawas	2,131	386	384	2,900
Wayne	1,925	349	354	2,628

Source: Tourism Economics

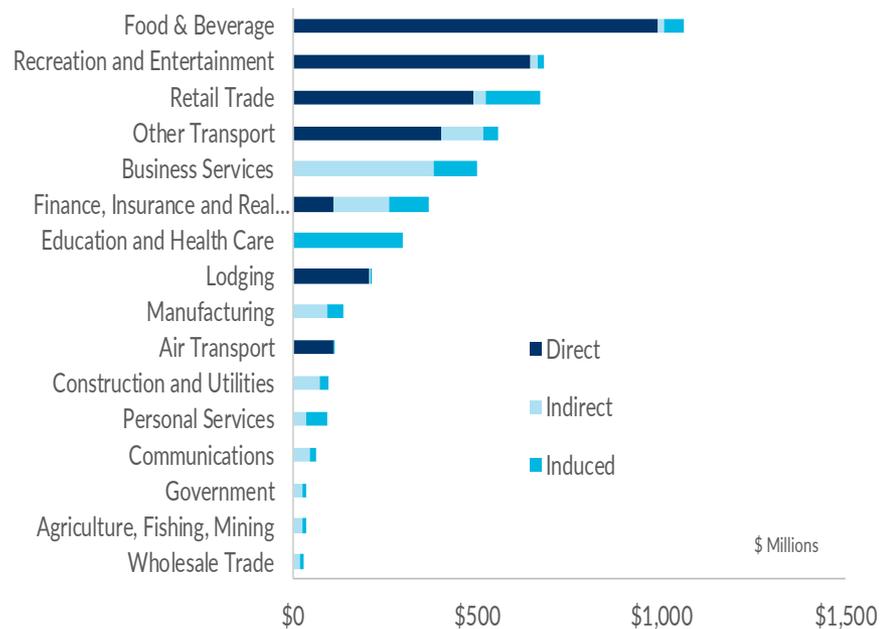
NORTHEAST OHIO IMPACT

Wage impacts by industry

Food and beverage and recreation and entertainment had the largest direct personal income support by tourism.

Tourism wage impacts by industry

Amounts in millions of current dollars



Source: Tourism Economics

NORTHEAST OHIO IMPACT

Wage impacts by industry

Tourism-driven personal income in the region is concentrated in Cuyahoga County

Tourism wage impacts by county

Dollar amounts in millions of USD	Direct wages	Indirect wages	Induced wages	Total wages
Region total	\$2,944.6	\$1,034.4	\$955.1	\$4,934.0
County				
Ashland	\$21.6	\$7.8	\$7.2	\$36.5
Ashtabula	\$43.8	\$15.5	\$14.3	\$73.6
Carroll	\$8.0	\$3.1	\$2.9	\$14.0
Columbiana	\$30.3	\$9.9	\$9.1	\$49.2
Coshocton	\$8.1	\$2.8	\$2.6	\$13.5
Cuyahoga	\$1,512.8	\$543.4	\$501.8	\$2,558.0
Geauga	\$36.6	\$12.3	\$11.4	\$60.3
Harrison	\$1.7	\$0.5	\$0.5	\$2.6
Holmes	\$23.5	\$9.0	\$8.3	\$40.9
Jefferson	\$29.6	\$10.2	\$9.5	\$49.3
Lake	\$121.4	\$42.0	\$38.8	\$202.2
Lorain	\$120.3	\$40.3	\$37.2	\$197.8
Mahoning	\$114.7	\$39.6	\$36.5	\$190.8
Medina	\$96.3	\$32.7	\$30.2	\$159.1
Portage	\$65.5	\$22.8	\$21.0	\$109.3
Richland	\$57.5	\$19.6	\$18.1	\$95.2
Stark	\$182.1	\$62.3	\$57.5	\$301.8
Summit	\$315.2	\$107.8	\$99.6	\$522.7
Trumbull	\$81.3	\$27.0	\$24.9	\$133.2
Tuscarawas	\$37.0	\$12.9	\$11.9	\$61.8
Wayne	\$37.4	\$12.9	\$11.9	\$62.1

Source: Tourism Economics

JEFFERSON COUNTY IMPACTS

ECONOMIC IMPACTS

Direct sales in the County and region

Jefferson County visitor spending decreased 19.5% in 2020, a decline less severe than that of the region and the state overall.

Direct sales trends

	2018	2019	2020
Jefferson County direct sales trends:			
Sales volume (\$mils)	105.2	154.2	124.2
Sales growth, % change	0.3%	46.6%	-19.5%
Wider region and state direct sales trends:			
Northeast Ohio sales growth, % change	5.0%	1.5%	-24.9%
Ohio sales growth, % change	8.3%	4.0%	-24.5%

Source: Tourism Economics

ECONOMIC IMPACTS

Business sales impacts by industry

Tourism generated \$204 million in total business sales in Jefferson County.

Business sales impacts by industry

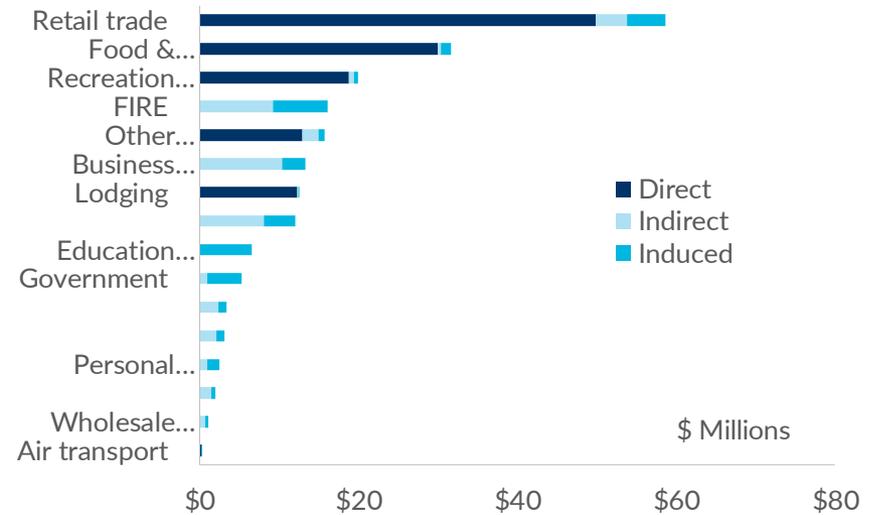
Amounts in millions of current dollars	Direct sales	Indirect sales	Induced sales	Total sales
Total, all industries	\$124.2	\$43.6	\$36.6	\$204.4
By industry				
Retail trade	\$49.9	\$4.0	\$4.8	\$58.7
Food & beverage	\$30.0	\$0.4	\$1.2	\$31.6
Recreation and entertainment	\$18.8	\$0.7	\$0.5	\$20.0
FIRE	\$0.0	\$9.3	\$6.8	\$16.1
Other transport	\$12.9	\$2.0	\$0.8	\$15.7
Business services	\$0.0	\$10.4	\$2.9	\$13.3
Lodging	\$12.3	\$0.1	\$0.1	\$12.5
Manufacturing	\$0.0	\$8.1	\$4.0	\$12.0
Education and healthcare	\$0.0	\$0.0	\$6.5	\$6.5
Government	\$0.0	\$0.9	\$4.3	\$5.3
Construction and utilities	\$0.0	\$2.4	\$1.0	\$3.4
Communications	\$0.0	\$2.1	\$1.0	\$3.1
Personal services	\$0.0	\$1.0	\$1.6	\$2.6
Agriculture, fishing, mining	\$0.0	\$1.4	\$0.6	\$2.0
Wholesale trade	\$0.0	\$0.7	\$0.5	\$1.2
Air transport	\$0.2	\$0.1	\$0.1	\$0.4

Source: Tourism Economics

ECONOMIC IMPACTS

Business sales impacts by industry

Business sales impacts by industry



Source: Tourism Economics

ECONOMIC IMPACTS

Employment impacts by industry

Tourism generated 2,170 jobs in Jefferson County.

Employment impacts by industry

Amounts in number of jobs	Direct jobs	Indirect jobs	Induced jobs	Total jobs
Total, all industries	1,591	288	290	2,170
By industry				
Food & beverage	767	13	33	813
Retail trade	323	13	58	394
Other transport	195	30	10	236
Recreation and entertainment	157	14	9	181
Lodging	150	2	2	153
Business services	-	99	28	127
Education and healthcare	-	1	78	79
FIRE	-	48	27	75
Personal services	-	10	23	33
Manufacturing	-	18	8	26
Agriculture, fishing, mining	-	12	4	16
Construction and utilities	-	10	2	12
Communications	-	8	3	11
Government	-	5	2	7
Wholesale trade	-	3	2	5
Air transport	-	0	0	1

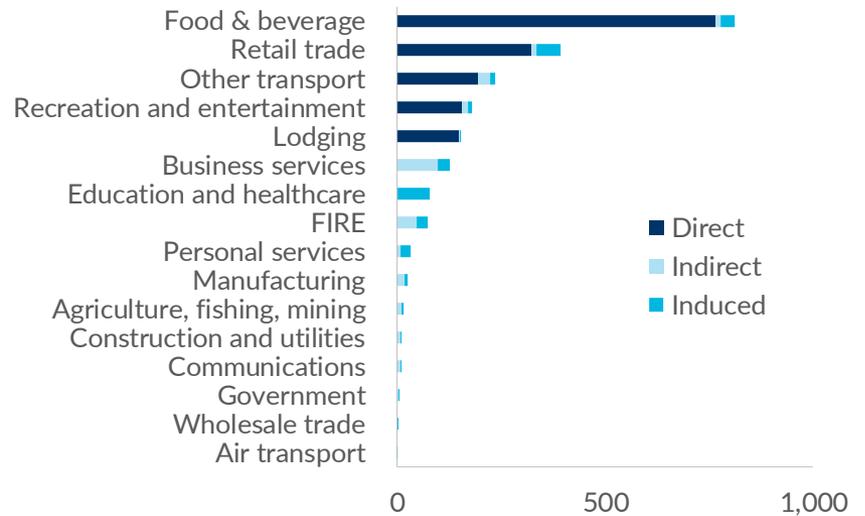
Source: Tourism Economics

ECONOMIC IMPACTS

Employment impacts by industry

The 2,170 jobs generated by tourism across several industries represented 9.8% of total county employment in 2020.

Employment impacts by industry



Source: Tourism Economics

ECONOMIC IMPACTS

Personal income impacts by industry

Tourism generated \$49.3 million in income in the County.

Personal income impacts by industry

Amounts in millions of current dollars	Direct income	Indirect income	Induced income	Total income
Total, all industries	\$29.6	\$10.2	\$9.5	\$49.3
By industry				
Food & beverage	\$11.5	\$0.2	\$0.5	\$12.2
Retail trade	\$8.4	\$0.4	\$1.4	\$10.2
Other transport	\$4.4	\$1.1	\$0.4	\$5.9
Business services	\$0.0	\$3.8	\$1.1	\$4.9
Recreation and entertainment	\$3.3	\$0.2	\$0.2	\$3.6
Education and healthcare	\$0.0	\$0.0	\$2.9	\$2.9
FIRE	\$0.0	\$1.5	\$1.1	\$2.6
Lodging	\$2.1	\$0.0	\$0.0	\$2.2
Manufacturing	\$0.0	\$0.9	\$0.4	\$1.3
Construction and utilities	\$0.0	\$0.7	\$0.2	\$0.9
Personal services	\$0.0	\$0.3	\$0.6	\$0.9
Communications	\$0.0	\$0.4	\$0.2	\$0.6
Government	\$0.0	\$0.2	\$0.1	\$0.3
Agriculture, fishing, mining	\$0.0	\$0.2	\$0.1	\$0.3
Wholesale trade	\$0.0	\$0.2	\$0.1	\$0.3
Air transport	\$0.0	\$0.0	\$0.0	\$0.1

Source: Tourism Economics

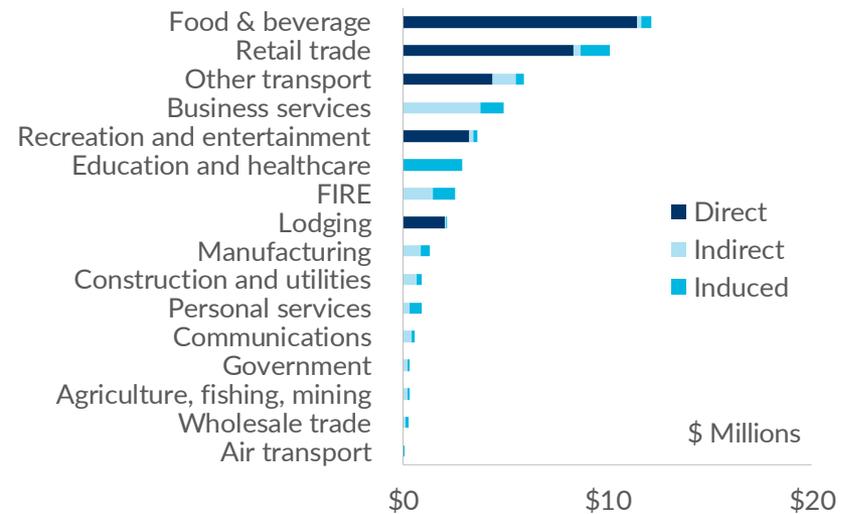
ECONOMIC IMPACTS

Personal income impacts by industry

Tourism-driven income came primarily in food and beverage, lodging, and recreation and entertainment.

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

Personal income impacts by industry



Source: Tourism Economics

ECONOMIC IMPACTS

Fiscal impacts

Tourism generated \$27 million in tax revenues, including \$12.9 million in state and local revenues.

Tourism tax revenues saved households in-county \$471 per household in 2020.

Tourism-generated tax revenues in 2020

Amounts in nominal dollars	Taxes generated
Total tax revenues	\$26,971,419
Federal Taxes	\$14,051,645
State Taxes	\$7,540,081
Local Taxes	\$5,379,693
State/Local Tax Savings Per Household	\$471

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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