

Data 2:4 Snapshots

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**REGIONAL
ECONOMICS:**
Hospitality & Tourism

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PLANNING COMMISSION





The Delaware Valley Regional Planning Commission is dedicated to uniting the region's elected officials, planning professionals, and the public with a common vision of making a great region even greater. Shaping the way we live, work, and play, DVRPC builds consensus on improving transportation, promoting smart growth, protecting the environment, and enhancing the economy. We serve a diverse region of nine counties: Bucks, Chester, Delaware, Montgomery, and Philadelphia in Pennsylvania; and Burlington, Camden, Gloucester, and Mercer in New Jersey. DVRPC is the federally designated Metropolitan Planning Organization for the Greater Philadelphia Region – leading the way to a better future.



The symbol in our logo is adapted from the official DVRPC seal and is designed as a stylized image of the Delaware Valley. The outer ring symbolizes the region as a whole while the diagonal bar signifies the Delaware River. The two adjoining crescents represent the Commonwealth of Pennsylvania and the State of New Jersey.

DVRPC is funded by a variety of funding sources, including federal grants from the U.S. Department of Transportation's Federal Highway Administration (FHWA) and Federal Transit Administration (FTA); the Pennsylvania and New Jersey departments of transportation; and DVRPC's state and local member governments. The authors, however, are solely responsible for the findings and conclusions herein, which may not represent the official views or policies of the funding agencies.

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As the region's metropolitan planning organization, DVRPC provides technical assistance and services to its member state and local governments. *Delaware Valley Data* is our periodic series of free data bulletins, analytical data reports, data reference guides, and data snapshots.

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Introduction

In 2014, DVRPC completed *Data Snapshot 2:2: A Regional Economic Cluster Analysis*, which assessed industry clusters in Greater Philadelphia. Industry clusters are groups of businesses that share similar and complementary technologies, infrastructure, products, labor markets, and services.¹ Industry cluster analysis is used to identify and locate the clusters present in a region's economy and provides a way to gauge the clusters' strengths and weaknesses compared to other regions and the national economy. Such insights can assist in maintaining or increasing cluster strengths by strategic resource targeting. Industry cluster analysis can also help identify new and emerging clusters to replace old and fading ones.

Data Snapshot 2.2 found that the Greater Philadelphia region is especially strong in the "education and knowledge creation" cluster. In addition, the region has long been known as a leader in life sciences. As a follow-up, Data Snapshot 2:3 assessed the importance of the life sciences and biotechnical cluster, a broad categorization of related industries that include health care, pharmaceuticals, biotechnology, and their related support services.

The purpose of the current snapshot is to discuss Greater Philadelphia's hospitality and tourism economy, a subset of the region's large service economy. The tourism economy spans multiple economic sectors, including not only visitor attractions themselves but also lodging, recreation, retail activity, real estate, air and rail passenger travel, food and beverage establishments, car rentals, taxi services, travel agents, artists, writers, performers, and promoters. The U.S. Cluster Mapping Project, for example, defines the "arts, entertainment, recreation, and visitor industries" cluster to include industries categorized in 57 separate 6-digit NAICS codes (see Appendix A for a complete listing).

This report focuses on two specific economic sectors: arts, entertainment, and recreation (companies that list 71 as their primary two-digit NAICS code), and accommodations and food services (companies with 72 as their two-digit NAICS code). The goal of this snapshot is to provide basic background information on hospitality and tourism in Greater Philadelphia, including the overall impact of the industry on the region's economy, the locations and scale of the region's primary tourist destinations, and the number of employees working in hospitality and tourism. The report will serve as background information for future DVRPC work on travel and tourism.

Tourism and the 2015 FAST Act

The Fixing America's Surface Transportation Act (FAST Act) of 2015 includes a new planning factor, to "enhance travel and tourism" (450.306(b) (9&10), for metropolitan planning organizations to consider in their long-range planning efforts. A component of the FAST Act is the creation of the National Advisory Committee on Travel and Tourism Infrastructure ("the Committee"), which will provide information, advice, and recommendations to the Secretary of Transportation on matters relating to the role of intermodal transportation in facilitating mobility with respect to travel and tourism activities. The FAST Act requires the Secretary of Transportation, in

¹ See www.pcrd.purdue.edu/signature-programs/regional-decision-maker.php for more information on Purdue University's Center for Regional Development's Regional Decision Maker (RDM).

consultation with the Committee, state departments of transportation, and other appropriate public and private transportation stakeholders, to develop a national travel and tourism infrastructure strategic plan that will:

- assess the condition and performance of our national transportation network with respect to travel and tourism;
- identify issues that create congestion and barriers to travel and tourism;
- forecast travel and tourism volume for the following 20 years;
- assess existing statutes, regulations, technologies, and other barriers to improved long-haul travel performance for travelers and tourists;
- identify best practices for improving transportation performance for tourists; and,
- identify strategies to improve multimodal connectivity for travelers and tourists.

With guidance from the National Advisory Committee, DVRPC will promote information sharing between the private and public sectors on transportation issues impacting travel and tourism within the Greater Philadelphia region. In upcoming months, DVRPC staff intends to identify and convene regional travel and tourism stakeholders to determine their needs in regard to transportation, accessibility, and necessary land use changes. This group will serve as an advisory committee to DVRPC staff regarding travel and tourism transportation-related enhancements.

Possible tasks include updating DVRPC's 1997 study, *How Do We Get There?: Improving Mobility for Tourists and Visitors*, with updated data, new tourist destinations, and an increased emphasis on multimodal access; reviewing the current TIP and Long-Range Plan to identify tourism accessibility to currently funded projects; developing a tourism GIS database; offering technical assistance to tourist sites, such as license plate surveys, crash analyses, shared parking, or wayfinding recommendations; analyzing access to emerging tourist destinations, such as wineries, distilleries, and other ecotourism points of interest; analyzing PHLASH service and possible route extensions into neighborhood commercial districts; analyzing intercity bus travel; or factoring access to tourist destinations into the screening of TIP projects.

The Economic Impact of Tourism

International and domestic tourism is a vital part of the national and regional economy, generating both direct and indirect revenue, jobs, wages, and taxes. The travel and tourism industry is one of the largest in the United States, contributing approximately \$1.5 trillion to the Gross Domestic Product (GDP) in 2015. The industry is expected to remain strong and continue to grow, with tourism and travel forecast to contribute more than \$2.6 trillion to the national economy by 2027². Approximately 5.5 million people work in the travel and tourism industry in the United States.

Over 75 million international travelers visited the United States in 2015, with New York City the most popular city to visit. Chinese travelers contributed the most to international travel spending (at around \$30 billion), followed by visitors from Canada and Mexico. International travel spending, however, was dwarfed by domestic travel spending—in 2016, U.S. residents accounted for almost 80 percent of the total travel expenditures.

² Statista, <https://www.statista.com/study/10115/us-travel-and-tourism-statista-dossier>, June 2017.

Southeastern Pennsylvania

Tourism has long been viewed as a vital part of Greater Philadelphia’s economy. In the early 1990s, as the City struggled to transition from its reliance on manufacturing to a modern, post-industrial economy, Mayor Rendell specifically targeted tourism (along with education and health care) as a key part of Philadelphia’s economic revitalization initiative. Since that time, significant investment (both public and private) has been made to support tourism, including the opening and expansion of the Philadelphia Convention Center, the creation of cultural districts such as the Avenue of the Arts and the Benjamin Franklin Parkway, enhancements in the historic district (including a new visitor center), and, more recently, the development of several high-end hotels and the emergence of visitor-friendly amenities around the City, including parks, restaurants, beer gardens, and museums.

According to data available from Visit Philly (Philadelphia’s official regional tourism and marketing agency), over 42 million people visited the five-county Southeastern Pennsylvania region (including the City of Philadelphia plus Bucks, Chester, Delaware, and Montgomery counties) in 2016, as indicated on Table 1. This marks the seventh consecutive year for record visitation, as illustrated in Figure 1³. Overnight guests visiting for leisure is the fastest growing segment of the industry, increasing by 43 percent between 2000 and 2008 and by 27 percent between 2008 and 2016.

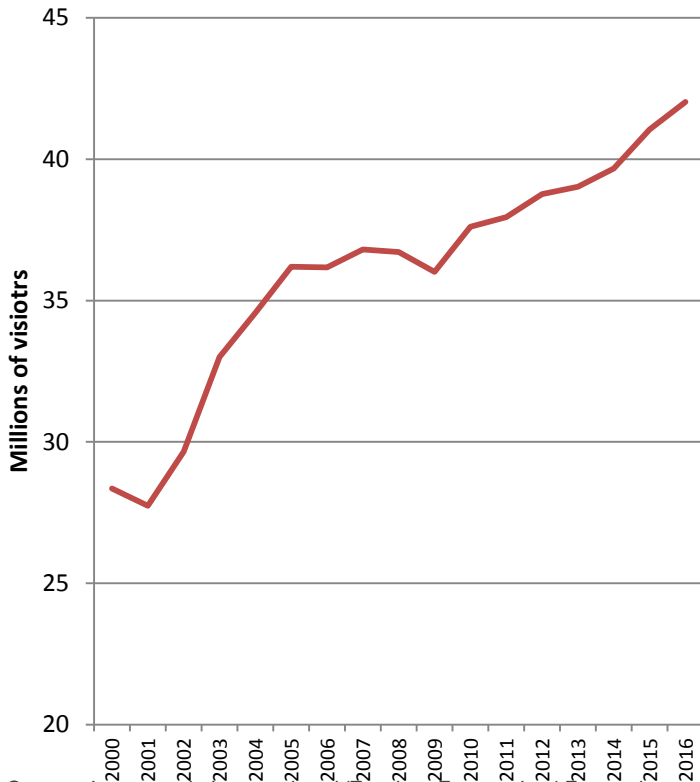
Table 1: Visitor Volume to Southeastern Pennsylvania, 2000-2016

Year	Total Domestic Visitors	Day Leisure	Day Business	Overnight Leisure	Overnight Business	Total Leisure Visitors	Total Business Visitors
2000	28.35	16.21	2.56	8.11	1.48	24.32	4.04
2002	29.65	16.54	2.30	9.35	1.46	25.89	3.76
2004	34.56	19.27	2.28	11.14	1.87	30.41	4.15
2006	36.17	20.04	2.48	11.65	2.01	31.69	4.49
2008	36.72	20.83	2.44	11.56	1.89	32.39	4.34
2010	37.61	20.67	2.42	12.59	1.93	33.26	4.35
2012	38.76	20.85	2.55	13.27	2.09	34.11	4.65
2014	39.67	20.99	2.60	13.90	2.17	34.89	4.78
2016	42.02	22.35	2.76	14.65	2.27	37.00	5.02
Percentage Change 2000-2008	30%	29%	-5%	43%	28%	33%	7%
Percentage Change 2008-2016	14%	7%	13%	27%	20%	14%	16%

Source: Longwoods International Tourism Economics/Econsult, May 2017. Numbers in millions. Includes visitors to Bucks, Chester, Delaware, Montgomery, and Philadelphia counties.

³ Visit Philadelphia, 2017 Annual Report, June 2017.

Figure 1: Annual Visitors to Greater Philadelphia



Source: Longwoods International/Tourism Economics/ Econsult Solutions Inc., June 2017. “Greater Philadelphia” includes Bucks, Chester, Delaware, Montgomery, and Philadelphia counties.

The region’s 42 million visitors spent over \$6.8 billion in 2016, primarily on food, drinks, and lodging. Annual growth in visitor spending has generally exceeded both growth in the number of visitors and the rate of inflation, indicating that not only are more visitors coming to the region, but that they are also spending more money during their trips . This direct spending generated an additional \$11 billion in economic impact (up from \$10 billion in 2015). The travel and tourism industry supports over 96,600 jobs and generates \$634 million annually in tax revenue for state and local governments. In 2015, 58 percent of the region’s economic impact occurred in the City of Philadelphia.

The future outlook for regional tourism remains strong. Greater Philadelphia’s tourism economy has generally tracked national performance, and the national forecast is for continued, steady growth.

The region’s location along the Northeast Corridor, within a day’s drive of Boston, New York, and Washington, DC, and its transportation assets, including Philadelphia International Airport, Amtrak, and the regional transit network, make it an attractive domestic and international destination. The region has also recently realized a boom in high-end hotel development in Center City Philadelphia, which will continue to support the growing industry.

Philadelphia has also hosted several high-profile events recently, beginning with the Papal Visit and continuing through the Democratic National Convention and the NFL Draft. While obviously contributing significantly to the economy in the short term, these events showcase the region’s destinations, resources, and capacity for hosting national and international events. The City’s designation as the nation’s first World Heritage City has likewise raised its national and international profile.

New Jersey

In 2015, New Jersey’s tourism industry directly supported over 318,000 jobs plus an additional 500,000 indirect and induced jobs, accounting for almost 10 percent of all jobs statewide⁴. When considering only direct employment, the tourism industry ranked 7th in employment in New Jersey in 2015, behind health and social assistance; retail trade; professional, scientific, and technical services; finance and

⁴ Tourism Economics (an Oxford Economics Company), *The Economic Impact of Tourism in New Jersey*, June 2016.

insurance; accommodation and food services (related to the tourism industry); and administrative and support services. In recent years, gains in non-hotel-related sectors have almost made up for the significant losses of jobs at Atlantic City casino hotels.

In 2015, tourism generated over \$37 billion of the state's Gross Domestic Product (about 6.6 percent of the entire economy). Including both indirect and induced impacts, tourism generated over \$10 billion in revenue, including \$4.7 billion in state and local tax revenue. Visitor trips to New Jersey destinations increased by 2.4 percent between 2014 and 2015, to over 95 million trips. While the number of daytime leisure trips, daytime business trips, and overnight leisure trips all increased, overnight business trips declined, from 4.2 million to 4.1 million.

Direct tourism sales receipts increased by 3.3 percent statewide between 2014 and 2015, to \$41.2 billion. Lodging accounts for 27 percent of visitor spending, followed by food and beverage (25 percent), retail sales (19 percent), non-air transportation (13 percent), and recreation (12.6 percent). Across the state, tourism sales grew in every county except Atlantic County between 2014 and 2015. Despite their decrease in sales since 2014, the highest direct sales were seen in Atlantic County, followed by Cape May and Ocean counties. Hotel demand increased by 1.1 percent, and, increased demand combined with average hotel rate increases of 2.1 percent resulted in a 3.2 percent increase in overall hotel revenue. State and municipal bed tax receipts grew by almost 5 percent.

Lacking the beaches of coastal New Jersey and the historic riches of Philadelphia and its surrounding suburbs, much of the focus in South Jersey has been on expanding and marketing the region's craft beverage industry, including wineries, distilleries, and breweries. Other South Jersey visitor destinations include the Adventure Aquarium and Children's Garden in Camden, historic sites and villages, antique stores, amusement parks, and agri-tourism destination, including farmers markets.





Major Tourist Destinations

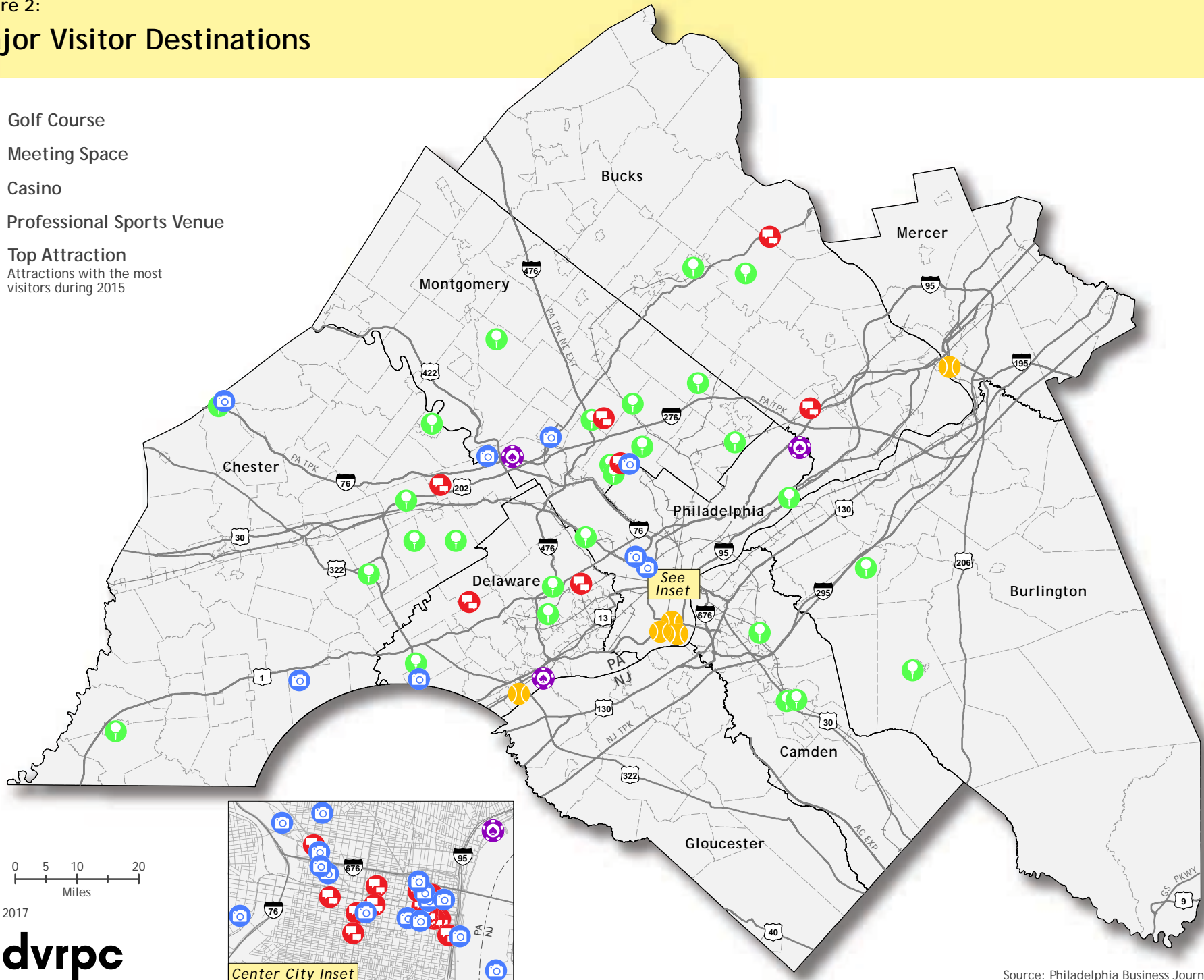
Rich in historic resources, the nine-county Greater Philadelphia region is also home to a multitude of other visitor attractions, ranging from major museums, to professional sports venues, to top-rated golf courses, to shops, restaurants, wineries, and breweries. Figure 2 identifies major tourist destinations in Greater Philadelphia, including the top 25 tourist attractions (based on 2015 visitation); top-rated golf courses; top meeting and convention spaces (based on available square footage); and professional sports venues⁵. Also included are the region's four casinos, with one located in Philadelphia (Sugar House Casino); one in Bucks County (Parx Casino); one in the City of Chester (Harrah's Philadelphia); and one in King of Prussia (Valley Forge Casino Resort). Destinations illustrated on Figure 2 are listed in Appendix A.

In addition to these top attractions, numerous other visitor destinations are located in the region, from smaller historic sites and markers, to smaller museums and galleries, to wineries, distilleries, and farmers markets. In the coming months, DVRPC will continue to explore the scale, locations, and needs of the region's visitor destinations.

⁵ Top attractions as identified by the Philadelphia Business Journal, May 2016.

Figure 2:
Major Visitor Destinations

-  Golf Course
-  Meeting Space
-  Casino
-  Professional Sports Venue
-  Top Attraction
Attractions with the most visitors during 2015



Source: Philadelphia Business Journal, May 2017

Hospitality and Tourism Employment

Tables 2 through 8 provide information on employees working in the arts, entertainment, and recreation sectors and those working in the accommodations and food services. This analysis is based on data available from the U.S. Census Bureau’s County Business Patterns, an annual series that provides county-level economic data by industry and includes the number of establishments, employment during the week of March 12, first quarter payroll, and annual payroll.

Arts, Entertainment and Recreation Employment

As indicated in Table 2, almost 50,000 employees in Greater Philadelphia worked in the arts, entertainment, and recreation sector in 2015. As expected, the largest number of these employees worked in Philadelphia, followed by Montgomery and Bucks counties. Although the largest number of employees worked in the Pennsylvania counties, the greatest percentage increase in tourism employment between 2005 and 2015 was experienced in Burlington, Mercer, and Gloucester counties, in New Jersey.

Table 2: Arts, Entertainment, and Recreation Employment in Greater Philadelphia

County	2005	2010	2015	Percent of the Region’s Total 2015	Change, 2005–2015	
					Absolute	Percentage
Bucks County	4,645	4,422	6,409	14%	1,764	38%
Chester County	2,987	4,266	4,463	10%	1,476	49%
Delaware County	3,066	3,263	5,017	11%	1,951	64%
Montgomery County	6,060	7,327	8,497	18%	2,437	40%
Philadelphia County	9,896	10,605	12,378	26%	2,482	25%
Five Pennsylvania Counties	26,654	29,883	36,764	78%	10,110	38%
Burlington County	1,750	2,106	3,073	7%	1,323	76%
Camden County	1,750	2,104	2,690	6%	940	54%
Gloucester County	910	1,187	1,500	3%	590	65%
Mercer County	1,750	2,339	2,950	6%	1,200	69%
Four New Jersey Counties	6,160	7,736	10,213	22%	4,053	66%
Nine-County DVRPC Region	32,814	37,619	46,977	100%	14,163	43%

Source: U.S. Census Bureau, County Business Patterns, May 2017. Includes all employers listing “71” as their primary 2-digit NAICS code. Excludes most government employees, railroad employees, and self-employed persons.

Table 3 identifies the number of arts, entertainment, and recreation establishments in Greater Philadelphia, and Table 4 lists the average number of employees working at each establishment. The total number of establishments in the region dipped between 2005 and 2010 before recovering by 2015, undoubtedly reflecting the impact of the earlier recession.

Table 3: Arts, Entertainment, and Recreation Establishments in Greater Philadelphia

County	2005	2010	2015	Percentage of the Region's Total, 2015	Change, 2005-2015	
					Absolute	Percentage
Bucks County	275	249	275	13%	0	0%
Chester County	198	210	224	11%	26	13%
Delaware County	188	199	215	10%	27	14%
Montgomery County	383	363	409	20%	26	7%
Philadelphia County	379	353	404	20%	25	7%
Five Pennsylvania Counties	1,423	1,374	1,527	74%	104	7%
Burlington County	175	154	143	7%	-32	-18%
Camden County	168	144	155	8%	-13	-8%
Gloucester County	87	88	95	5%	8	9%
Mercer County	156	151	144	7%	-12	-8%
Four New Jersey Counties	586	537	537	26%	-49	-8%
Nine-County DVRPC Region	2,009	1,911	2,064	100%	55	3%

Source: U.S. Census Bureau, County Business Patterns, May 2017. Includes all employers listing "71" as their primary 2-digit NAICS code. Excludes most government employees, railroad employees, and self-employed persons.

Table 4: Average Number of Employees per Arts, Entertainment, & Recreation Establishment

County	2005	2010	2015	Percentage Change 2005-2015
Bucks County	16.9	17.8	23.3	38%
Chester County	15.1	20.3	19.9	32%
Delaware County	16.3	16.4	23.3	43%
Montgomery County	15.8	20.2	20.8	31%
Philadelphia County	26.1	30.0	30.6	17%
Five Pennsylvania Counties	18.7	21.7	24.1	29%
Burlington County	10.0	13.7	21.5	115%
Camden County	10.4	14.6	17.4	67%
Gloucester County	10.5	13.5	15.8	51%
Mercer County	11.2	15.5	20.5	83%
Four New Jersey Counties	10.5	14.4	19.0	81%
Nine-County DVRPC Region	16.3	19.7	22.8	39%

Source: U.S. Census Bureau, County Business Patterns, May 2017. Includes all employers listing "71" as their primary 2-digit NAICS code. Excludes most government employees, railroad employees, and self-employed persons.

Counties with the greatest number of arts, entertainment, and recreation companies include Montgomery and Philadelphia, followed by Bucks and Chester counties. Although the number of employees working in the sector increased between 2005 and 2015 in all nine counties, the number of establishments for which the employees were working declined in three of the region’s four New Jersey counties, and, despite absolute increases in the other six counties, the rates of growth in the number of establishments were more moderate than employment growth rates. The average number of employees working for arts, entertainment, and recreation companies has increased since 2005.

Accommodations and Food Services Employment

As indicated in Table 5, the accommodations and food services sector employed over 193,500 people in 2015, with the greatest number working in Philadelphia, followed by Montgomery and Bucks counties. More food service and accommodations employees work in Philadelphia than in the region’s four New Jersey counties combined. The greatest percentage increases in accommodations and food services employment between 2005 and 2015 were realized in Philadelphia and Bucks counties, while the greatest absolute increases in employment were seen in Philadelphia and Montgomery counties. Philadelphia gained more than twice the number of employees in food services and accommodations between 2005 and 2015 than did the four New Jersey counties.

There were over 12,000 accommodation and food services establishments located throughout the region in 2015, as indicated in Table 6. The largest number of these establishments is located in Philadelphia, again followed by Bucks and Montgomery counties. Table 7 indicates the average number of employees working for each establishment, which has increased slightly since 2005.

Table 5: Accommodation and Food Services Employment in Greater Philadelphia

County	2005	2010	2015	Percentage of the Region's Total, 2015	Change, 2005–2015	
					Absolute	Percentage
Bucks County	18,039	20,042	21,728	11%	3,689	20%
Chester County	14,631	15,309	16,102	8%	1,471	10%
Delaware County	15,769	16,060	17,010	9%	1,241	8%
Montgomery County	27,587	27,919	32,060	17%	4,473	16%
Philadelphia County	45,275	51,725	56,015	29%	10,740	24%
Five Pennsylvania Counties	121,301	131,055	142,915	74%	21,614	18%
Burlington County	13,151	12,725	14,374	7%	1,223	9%
Camden County	12,960	13,709	14,718	8%	1,758	14%
Gloucester County	7,540	7,914	8,404	4%	864	11%
Mercer County	11,785	11,587	13,165	7%	1,380	12%
Four New Jersey Counties	45,436	45,935	50,661	26%	5,225	11%
Nine-County DVRPC Region	166,737	176,990	193,576	100%	26,839	16%

Source: U.S. Census Bureau, County Business Patterns, May 2017. Includes all employers listing “72” as their primary 2-digit NAICS code. Excludes most government employees, railroad employees, and self-employed persons.

Table 6: Accommodation and Food Services Establishments in Greater Philadelphia

County	2005	2010	2015	Percent of the Region's Total 2015	Change, 2005–2015	
					Absolute	Percentage
Bucks County	1,231	1,360	1,399	11%	168	14%
Chester County	832	936	957	8%	125	15%
Delaware County	1,048	1,048	1,089	9%	41	4%
Montgomery County	1,724	1,874	1,965	16%	241	14%
Philadelphia County	3,441	3,959	3,753	30%	312	9%
Five Pennsylvania Counties	8,276	9,177	9,163	74%	887	11%
Burlington County	848	863	894	7%	46	5%
Camden County	969	1,000	1,001	8%	32	3%
Gloucester County	452	485	490	4%	38	8%
Mercer County	809	816	829	7%	20	2%
Four New Jersey Counties	3,078	3,164	3,214	26%	136	4%
Nine-County DVRPC Region	11,354	12,341	12,377	100%	1,023	9%

Source: U.S. Census Bureau, County Business Patterns, May 2017. Includes all employers listing “72” as their primary 2-digit NAICS code. Excludes most government employees, railroad employees, and self-employed persons.

Table 7: Average Number of Employees per Accommodations and Food Services Establishment

County	2005	2010	2015	Percentage Change 2005-2015
Bucks County	14.7	14.7	15.5	6%
Chester County	17.6	16.4	16.8	-4%
Delaware County	15.0	15.3	15.6	4%
Montgomery County	16.0	14.9	16.3	2%
Philadelphia County	13.2	13.1	14.9	13%
Five Pennsylvania Counties	14.7	14.3	15.6	6%
Burlington County	15.5	14.7	16.1	4%
Camden County	13.4	13.7	14.7	10%
Gloucester County	16.7	16.3	17.2	3%
Mercer County	14.6	14.2	15.9	9%
Four New Jersey Counties	14.8	14.5	15.8	7%
Nine-County DVRPC Region	14.7	14.3	15.6	7%

Source: U.S. Census Bureau, County Business Patterns, May 2017. Includes all employers listing “72” as their primary 2-digit NAICS code. Excludes most government employees, railroad employees, and self-employed persons.

Payroll and Wages

In addition to the number of employees and establishments, total annual payroll and average annual wage are also important considerations when assessing the importance of an economic sector or cluster. As indicated in Table 8, arts, entertainment, and recreation jobs were responsible for over \$1.8 billion in payroll in 2015, while the payroll distributed by accommodations and food services employers amounted to almost \$3.5 billion. The payroll generated by employers in the arts, entertainment, and recreation sector increased by 79 percent between 2005 and 2015, while the payroll distributed to accommodations and food services employees increased by 41 percent.

Table 9 provides the average annual wage of employees in the two sectors. The average annual wage of arts, entertainment, and recreation employees varies significantly throughout the region, from \$68,629 in Philadelphia to only \$16,556 in Gloucester County, New Jersey. This differential is likely due to the wide variety of jobs covered by the classification, and the most common type of employment in specific counties. For example, Philadelphia includes the region's four major sports teams, which may skew average wages in this sector. Jobs in the accommodations and food services sector require a lower educational background and skill set than other sectors and generally command lower wages, ranging from a high of \$22,553 in Philadelphia to a low of \$16,790 in Gloucester County.

Table 8: Annual Payroll of Hospitality-Related Industries

County	Arts, Entertainment, and Recreation			Accommodations and Food Service		
	2005	2015	Percentage Change 2005-2015	2005	2015	Percentage Change 2005-2015
Bucks County	\$83,275	\$143,100	72%	\$228,577	\$355,273	55%
Chester County	\$62,382	\$101,704	63%	\$202,460	\$283,751	40%
Delaware County	\$60,528	\$143,903	138%	\$202,953	\$280,665	38%
Montgomery County	\$113,365	\$179,106	58%	\$392,872	\$580,036	48%
Philadelphia County	\$552,475	\$1,042,089	89%	\$817,999	\$1,146,457	40%
Five Pennsylvania Counties	\$872,025	\$1,609,902	85%	\$1,844,861	\$2,646,182	43%
Burlington County	\$35,094	\$54,978	57%	\$172,417	\$229,021	33%
Camden County	\$39,557	\$54,414	38%	\$167,840	\$225,727	34%
Gloucester County	\$16,291	\$24,124	48%	\$89,650	\$130,244	45%
Mercer County	\$44,880	\$65,499	46%	\$187,569	\$248,405	32%
Four New Jersey Counties	\$135,822	\$199,015	47%	\$617,476	\$833,397	35%
Nine-County DVRPC Region	\$1,007,847	\$1,808,917	79%	\$2,462,337	\$3,479,579	41%

Source: U.S. Census Bureau, County Business Patterns, May 2017. Numbers in \$1,000s. "Arts, entertainment, and recreation" includes all employers listing 71 as their primary 2-digit NAICS code; "accommodations and food services" includes all employers listing 72 as their primary 2-digit NAICS code. Excludes most government employees, railroad employees, and self-employed persons.

Table 9: Average Annual Wages of Hospitality-Related Jobs

County	Arts, Entertainment, and Recreation			Accommodations and Food Services		
	2005	2015	Percentage Change 2005-2015	2005	2015	Percentage Change 2005-2015
Bucks County	\$17,058	\$23,234	36%	\$13,988	\$17,047	22%
Chester County	\$19,824	\$24,782	25%	\$15,230	\$18,783	23%
Delaware County	\$18,812	\$28,761	53%	\$14,458	\$17,551	21%
Montgomery County	\$19,108	\$21,987	15%	\$15,052	\$19,574	30%
Philadelphia County	\$53,545	\$68,629	28%	\$19,161	\$22,553	18%
Burlington County	\$17,766	\$19,567	10%	\$14,463	\$17,565	21%
Camden County	\$26,033	\$39,318	51%	\$14,408	\$17,435	21%
Gloucester County	\$14,609	\$16,556	13%	\$12,677	\$16,790	32%
Mercer County	\$20,377	\$21,770	7%	\$17,061	\$19,868	16%
United States Average	\$28,157	\$36,158	28%	\$15,163	\$19,415	28%

Sources: U.S. Bureau of Labor Statistics, Quarterly Census of Employment & Wages (QCEW), May 2017. Includes only private employment, all establishment sizes. Average annual salary data is not available for the aggregated nine-county DVRPC region.

Location Quotient Analysis

Location quotient analysis compares the relative concentration of a specific industry’s establishments, employment, or wages in a regional economy to the concentration in a larger economy. The location quotient is calculated by dividing the percentage of each attribute (establishments, employment, and wages) in the regional economy by the percentage of the same attribute in the larger economy. In this case, the larger economy is the nation, so any location quotient over 1.00 indicates that the cluster’s establishments, employment, and wages comprise a larger percentage of the region’s economy than that of the nation as a whole.

Tables 10 and 11 provide data on the change in jobs and location quotients in each of the region’s nine counties. Location quotients for the arts, entertainment, and recreation sector are above 1.0 in Bucks, Delaware, and Philadelphia counties, indicating that those jobs are more concentrated than would be expected given the national economy. In all counties, the percentage change in jobs was higher than the percentage change in the location quotient, indicating that, even though the number of jobs increased in each county, the employment growth rate in the sector was higher nationwide.

The location quotients for accommodation and food services jobs are below 1.0 in all of the region’s nine counties. A location quotient less than 1.0 is not necessarily negative or positive; it simply indicates that other sectors are more prevalent in a regional, county, or local economy. In many cases, these other sectors may be more valuable, in terms of wages, employment, and growth potential.

Table 10: Arts, Entertainment, and Recreation Jobs and Location Quotients

County	Jobs			Location Quotients		
	2005	2015	Percentage Change 2005-2015	2005	2015	Percentage Change 2005-2015
Bucks County	4,779	6,372	33%	1.07	1.37	28%
Chester County	3,453	3,937	14%	0.87	0.88	1%
Delaware County	3,004	4,447	48%	0.85	1.12	32%
Montgomery County	6,212	6,734	8%	0.75	0.77	3%
Philadelphia County	10,552	12,378	17%	0.98	1.04	6%
Burlington County	2,173	2,817	30%	0.64	0.79	23%
Camden County	2,775	3,381	22%	0.78	0.95	22%
Gloucester County	1,308	1,405	7%	0.74	0.76	3%
Mercer County	2,801	2,567	-8%	0.73	0.59	-19%
Nine-County DVRPC Region	37,057	44,038	19%	0.85	0.94	11%

Sources: U.S. Bureau of Labor Statistics, Quarterly Census of Employment & Wages (QCEW), May 2017. Includes federal, state, and private employment.

Table 11: Accommodation and Food Services Jobs and Location Quotients

County	Jobs			Location Quotients		
	2005	2015	Percentage Change 2005-2015	2005	2015	Percentage Change 2005-2015
Bucks County, Pennsylvania	17,799	20,441	15%	0.82	0.86	5%
Chester County	13,346	15,945	19%	0.70	0.70	0%
Delaware County	14,038	16,450	17%	0.81	0.81	0%
Montgomery County	27,881	30,862	11%	0.70	0.69	-1%
Philadelphia County	45,903	56,087	22%	0.87	0.92	6%
Burlington County	13,141	13,905	6%	0.79	0.76	-4%
Camden County	12,458	14,735	18%	0.72	0.81	13%
Gloucester County	7,907	8,298	5%	0.92	0.87	-5%
Mercer County	12,109	12,340	2%	0.65	0.56	-14%
Nine-county DVRPC Region	164,582	189,063	15%	0.78	0.79	1%

Sources: U.S. Bureau of Labor Statistics, Quarterly Census of Employment & Wages (QCEW), May 2017. Includes federal, state, and private employment.

How Does Greater Philadelphia Compare to Other Large Metros?

Table 12 describes how Greater Philadelphia’s⁶ arts, entertainment, and recreation economy compares to that of the nation’s largest metropolitan statistical areas (MSA). Among the nation’s ten largest metropolitan areas, the arts, entertainment, and recreation cluster has a location quotient at or above 1.00 in only Los Angeles and New York. This is not surprising, given the relative importance of other significant clusters in major metros, including education, health care, and life sciences. Conversely, metros with the highest leisure and hospitality location quotients include Kahului-Wailuku-Lahaina, Hawaii; Las Vegas, Nevada; Atlantic City, New Jersey; Ocean City, New Jersey; Myrtle Beach, South Carolina; Brunswick, Georgia; Flagstaff, Arizona, and Hilton Head, South Carolina, all of which have location quotients greater than 2.00.

Although the jobs location quotient for arts, entertainment, and recreation is below 1.0 for the Philadelphia MSA as a whole, the location quotient is 1.04 for the City of Philadelphia, indicating that the cluster is more concentrated in the City than would be expected when compared to the national economy. Furthermore, when breaking the sector into its component industries, the City has exceptionally high location quotients for both “museums, historic sites, and similar institutions” and for “performing arts, spectator sports, and related industries”, as indicated in Table 13.

Table 12: Arts, Entertainment, and Recreation Employment in the Nation’s Ten Largest Metros

Metropolitan Area	Employment 2015	Employment Location Quotient 2015	Change in Employment, 2005–2015	Change in Location Quotient 2005–2015
New York-Newark-Jersey City NY Metro	170,606	1.04	26%	4%
Los Angeles-Long Beach-Anaheim CA Metro	138,801	1.26	24%	13%
Chicago-Naperville-Elgin IL Metro	83,809	0.83	6%	-3%
Dallas-Fort Worth-Arlington TX Metro	10,501	0.89	47%	14%
Houston-The Woodlands-Sugar Land TX Metro	32,004	0.48	20%	-13%
Washington-Arlington-Alexandria DC Metro	53,500	0.98	24%	10%
Philadelphia-Camden-Wilmington PA Metro	48,739	0.91	21%	10%
Miami-Fort Lauderdale-West Palm Beach FL Metro	43,129	0.98	9%	-4%
Atlanta-Sandy Springs-Roswell GA Metro	31,018	0.58	23%	2%
Boston-Cambridge-Newton MA Metro	44,901	0.82	24%	4%

Source: U.S. Bureau of Labor Statistics, Quarterly Census of Wages and Earnings (QCEW), May 2017.

⁶ The Philadelphia MSA’s boundaries are different than DVRPC’s nine counties. Mercer County is excluded, while Salem County, NJ, New Castle County, DE, and Cecil County, MD are included. This is why the “Nine-county DVRPC Region” values differ from the Philadelphia MSA values in Table 10 vs. Table 12 and Table 11 vs. Table 13

Table 13: Arts, Entertainment, and Recreation Location Quotients by Type, 2015

Metropolitan Area	Amusements, Gambling, and Recreation Industries	Museums, Historical Sites, and Similar Institutions	Performing Arts, Spectator Sports, and Related Industries
New York-Newark-Jersey City NY Metro	0.88	1.25	1.80
Los Angeles-Long Beach-Anaheim CA Metro	1.12	0.54	2.46
Chicago-Naperville-Elgin IL Metro	1.10	1.07	0.65
Dallas-Fort Worth-Arlington TX Metro	0.60	1.69	0.89
Houston-The Woodlands-Sugar Land TX Metro	0.51	0.97	0.57
Washington-Arlington-Alexandria DC Metro	0.77	1.90	0.88
Philadelphia-Camden-Wilmington PA Metro	0.96	1.14	0.93
Miami-Fort Lauderdale-West Palm Beach FL Metro	0.84	0.71	1.60
Atlanta-Sandy Springs-Roswell GA Metro	0.74	0.41	0.62
Boston-Cambridge-Newton MA Metro	0.76	1.03	1.14

Source: U.S. Bureau of Labor Statistics, Quarterly Census of Wages and Earnings (QCEW), May 2017.

Table 14 describes how Greater Philadelphia’s accommodations and food services economy compares to that of the nation’s largest metropolitan areas. Among the nation’s ten largest metropolitan areas, the accommodations and food services cluster has a location quotient at or above 1.00 in only Miami, Florida. At 0.78, Philadelphia’s location quotient for accommodations and food services is comparable to most other large metros.

Table 14: Accommodations and Food Services Employment in Nation’s Ten Largest Metros

Metropolitan Area	Employment 2015	Employment Location Quotient 2015	Change in Employment, 2005–2015	Change in Location Quotient 2005–2015
New York-Newark-Jersey City NY Metro	692,483	0.82	40%	14%
Los Angeles-Long Beach-Anaheim CA Metro	557,849	0.98	27%	8%
Chicago-Naperville-Elgin IL Metro	375,920	0.77	20%	4%
Dallas-Fort Worth-Arlington TX Metro	304,440	0.92	33%	35%
Houston-The Woodlands-Sugar Land TX Metro	266,428	0.75	46%	27%
Washington-Arlington-Alexandria DC Metro	266,030	0.80	24%	1%
Philadelphia-Camden-Wilmington PA Metro	203,018	0.78	16%	7%
Miami-Fort Lauderdale-West Palm Beach FL Metro	261,845	1.09	28%	4%
Atlanta-Sandy Springs-Roswell GA Metro	233,751	0.87	21%	-3%
Boston-Cambridge-Newton MA Metro	215,841	0.84	24%	-2%

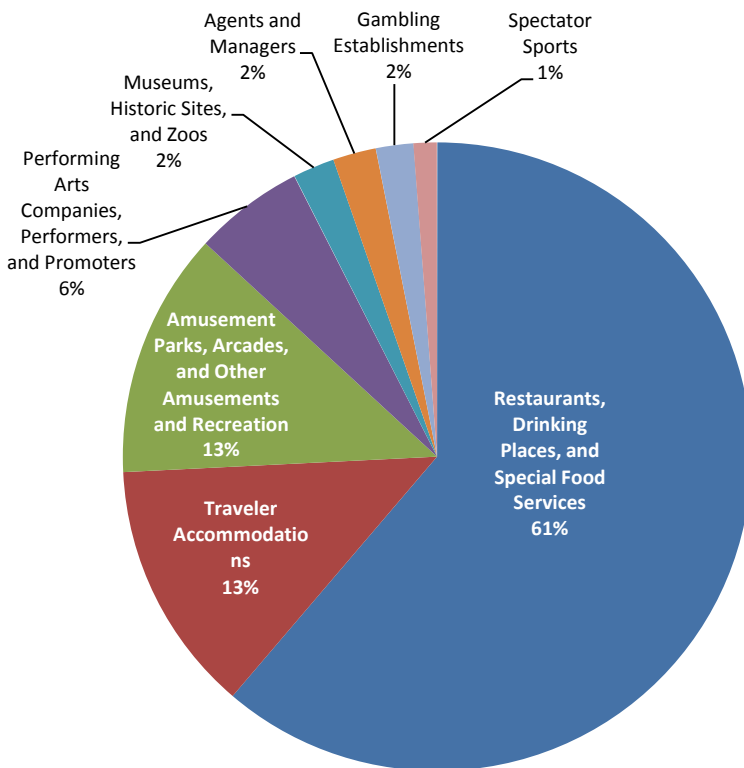
Source: U.S. Bureau of Labor Statistics, Quarterly Census of Wages and Earnings (QCEW).

Greater Philadelphia’s Hospitality and Tourism Employers

In addition to employment data available through federal sources, this data snapshot also uses data available through the National Establishments Time Series (NETS) database to identify the location of hospitality and tourism-related employers in Greater Philadelphia. The NETS database is essentially a “cleaned-up” version of the Dun and Bradstreet database, available through Walls and Associates. Using each company’s unique DUNS number (or numbers, in cases where separate divisions within a company have unique DUNS numbers), Walls creates a time series for each business and then screens the data to eliminate duplicates and identify anomalies. If a file contains suspicious information, the data is cross-checked with previous annual records and adjusted or eliminated as appropriate, based on information collected from other sources (including government and non-profits).

In March 2016, DVRPC acquired an updated NETS dataset that included both revised 2010 and 2013 employment data. DVRPC staff reviewed the 2010 data and the 2013 data to eliminate any remaining duplicates and correct obvious errors. The data was then reviewed by the region’s county planning staffs, and further corrections were made based on local knowledge.

Figure 3: Hospitality-Related Employment in Greater Philadelphia, 2013



Source: Delaware Valley Regional Planning Commission (based on data from the 2013 National Establishments Times Series (NETS) database), May 2017.

One advantage of the establishment-based NETS Database is that all employment, sales, and other activity is reported at the actual facility—not the headquarters. Unlike government sources of employment data, the NETS database includes sole proprietors, part-time jobs, and farm operations, and has been found to be more accurate in reporting data for small privately-owned firms and public sector employers such as post offices and public schools.

Figure 3 and Table 15 illustrate the number and distribution of hospitality and tourism-related employers in the Greater Philadelphia region, based on NETS data. Over 209,000 employees worked in tourism-related jobs in the nine-county region in 2013, an increase of 13 percent since 2010. The largest share (61 percent) worked for restaurants, drinking places, or special food services, followed by traveler accommodations (including hotels, recreational vehicle parks, and boarding houses).

Table 15: Hospitality-Related Employment in Greater Philadelphia, by Type

Employment Type	Employment				Percentage of the Region's Total Hospitality Employment, 2013
	2010	2013	Absolute Change	Percentage Change 2010-2013	
Restaurants, Drinking Places, Special Food Services	116,561	128,424	11,863	10%	61%
Traveler Accommodations	22,522	27,177	4,655	21%	13%
Amusement Parks, Arcades, and Other Amusements	22,853	26,449	3,596	16%	13%
Performing Arts Companies, Performers, and Promoters	8,142	11,897	3,755	46%	6%
Museums, Historic Sites, and Zoos	4,033	4,482	449	11%	2%
Agents and Managers	4,327	4,662	335	8%	2%
Gambling Establishments	2,929	4,038	1,109	38%	2%
Spectator Sports	3,771	2,519	-1,252	-33%	1%
Total	185,138	209,648	24,510	13%	100%

Source: Delaware Valley Regional Planning Commission (based on data from the 2013 National Establishments Times Series (NETS) database), May 2017.

Table 16 indicates the distribution of hospitality-related employment throughout the nine-county DVRPC region. Over three-quarters of the region's hospitality-related employment is located in its five Pennsylvania counties, including 37 percent in Philadelphia alone. There were more employees working in the City of Philadelphia in hospitality-related employment in 2013 than were working in the region's four New Jersey counties combined. Employment in the performing arts has realized the fastest rate of growth (46 percent) followed by gambling establishments (38 percent) and traveler accommodations (21 percent).

Figure 4 illustrates the location and relative size (based on the number of employees) of the region's visitor attractions, including amusement parks and arcades; other amusement and recreation sites; museums, historic sites, and zoos; performing arts companies; gambling establishments; and spectator sports venues. Figure 5 illustrates the locations of eating and drinking establishments, while traveler accommodations (including hotels, motels, inns, rooming and boarding houses, RV parks, and recreational camps) are illustrated on Figure 6. Finally, Figure 7 illustrates the locations of artists, writers, performers, and promoters, also supported indirectly by the tourism industry.

Table 16: Hospitality-Related Employment in Greater Philadelphia, by County

Employment Type	Employment				Percentage of the Region's Total Hospitality Employment, 2013
	2010	2013	Absolute Change	Percentage Change 2010-2013	
Bucks County	13,231	15,039	1,808	14%	7%
Chester County	7,536	9,926	2,390	32%	5%
Delaware County	14,684	17,078	2,394	16%	8%
Montgomery County	34,873	39,307	4,434	13%	19%
Philadelphia County	70,516	77,885	7,369	10%	37%
Five Pennsylvania Counties	140,840	159,235	18,395	13%	76%
Burlington County	4,402	5,158	756	17%	2%
Camden County	13,512	14,672	1,160	9%	7%
Gloucester County	14,503	17,538	3,035	21%	8%
Mercer County	11,881	13,045	1,164	10%	6%
Four New Jersey Counties	44,298	50,413	6,115	14%	24%
Nine County DVRPC Region	185,138	209,648	24,510	13%	100%

Source: Delaware Valley Regional Planning Commission (based on data from the 2013 National Establishments Times Series (NETS) database), May 2017.

Summary

In 2014, DVRPC completed *Data Snapshot 2:2: A Regional Economic Cluster Analysis*. That report identifies economic strengths, trends, and opportunities in Greater Philadelphia through an analysis of clusters of traded industries, characterizing the region's clusters as strong or weak, and as either growing or stable. That report found that the education and knowledge creation cluster was particularly strong. Data Snapshot 2:3 focused on the region's life science and health care economy, also one of the region's most significant clusters.

The current report assesses the relative importance of hospitality and tourism in the nine-county DVRPC region. The tourism and travel industry is a significant contributor to the region's economy, generating billions in direct and indirect economic impact and employing hundreds of thousands of residents. Over 42 million people visited the five-county Southeastern Pennsylvania region (including the City of Philadelphia plus Bucks, Chester, Delaware, and Montgomery counties) in 2016, spending over \$6.8 billion and indirectly generating \$11 billion in economic impact. In New Jersey, direct and indirect tourism-related jobs account for 10 percent of all jobs statewide, and over 50,000 people in the region's four New Jersey counties worked for hospitality-related businesses in 2013.

The future outlook for regional tourism remains strong. Greater Philadelphia's tourism economy has generally tracked national performance, and the national forecast is for continued, steady growth. The region's location along the Northeast Corridor, within a day's drive of Boston, New York, and Washington,

DC, and its transportation assets, including Philadelphia International Airport and the regional transit network, make it an attractive domestic and international destination. Greater Philadelphia has hosted several high-profile events recently, beginning with the Papal Visit and continuing through the Democratic National Convention and the NFL Draft. These events, coupled with the City of Philadelphia's designation as the nation's first World Heritage City, have showcased the region's destinations, resources, and capacity for hosting national and international events.

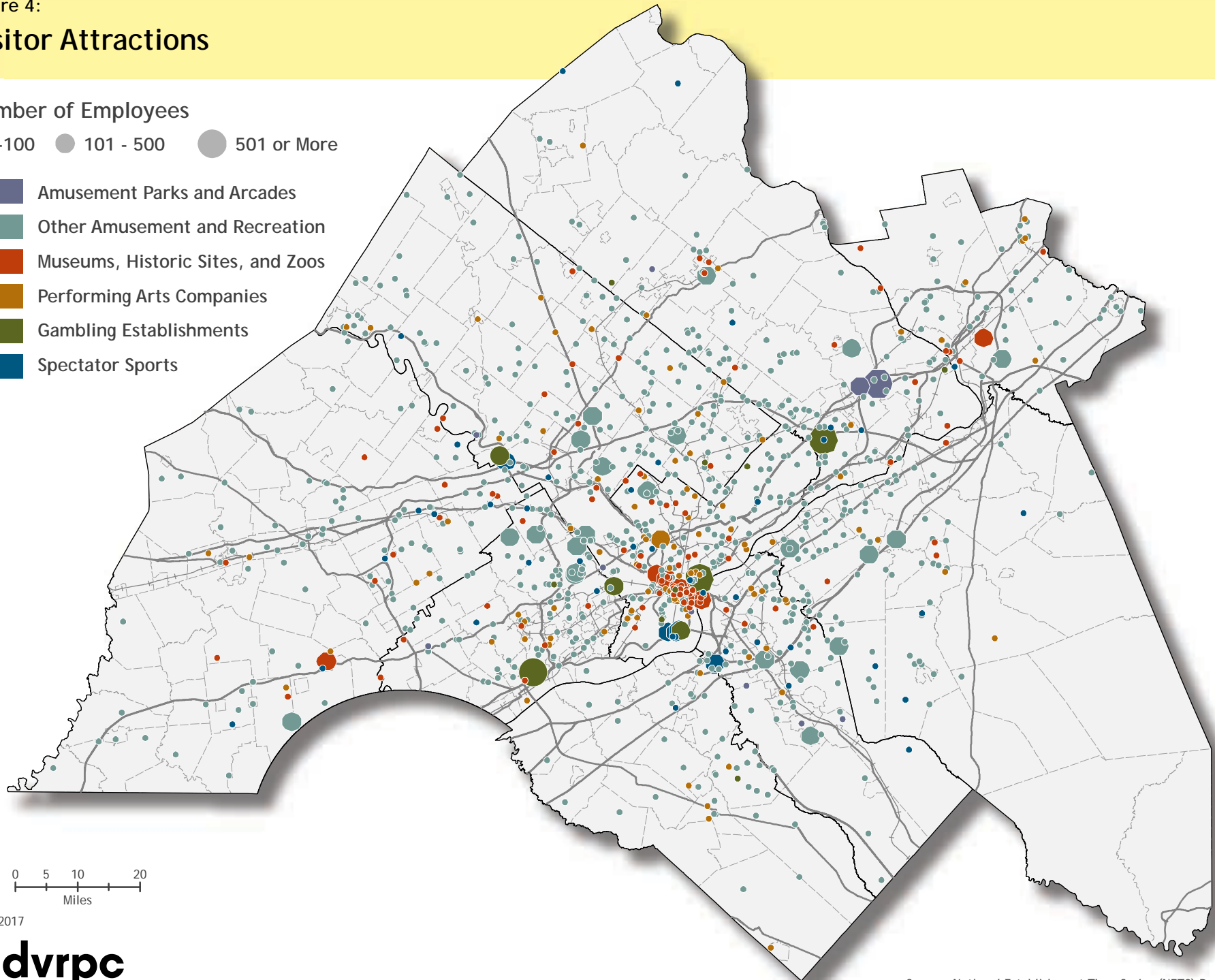
The region's economic development professionals and policy makers should continue to support hospitality and tourism-related industries, including initiatives to improve access and facilitate coordination and cooperation. In the coming months, DVRPC will continue to explore the scale, locations, challenges facing, and needs of the region's visitor destinations.

Figure 4:
Visitor Attractions

Number of Employees

- 5-100
- 101 - 500
- 501 or More

- Amusement Parks and Arcades
- Other Amusement and Recreation
- Museums, Historic Sites, and Zoos
- Performing Arts Companies
- Gambling Establishments
- Spectator Sports



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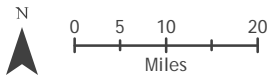
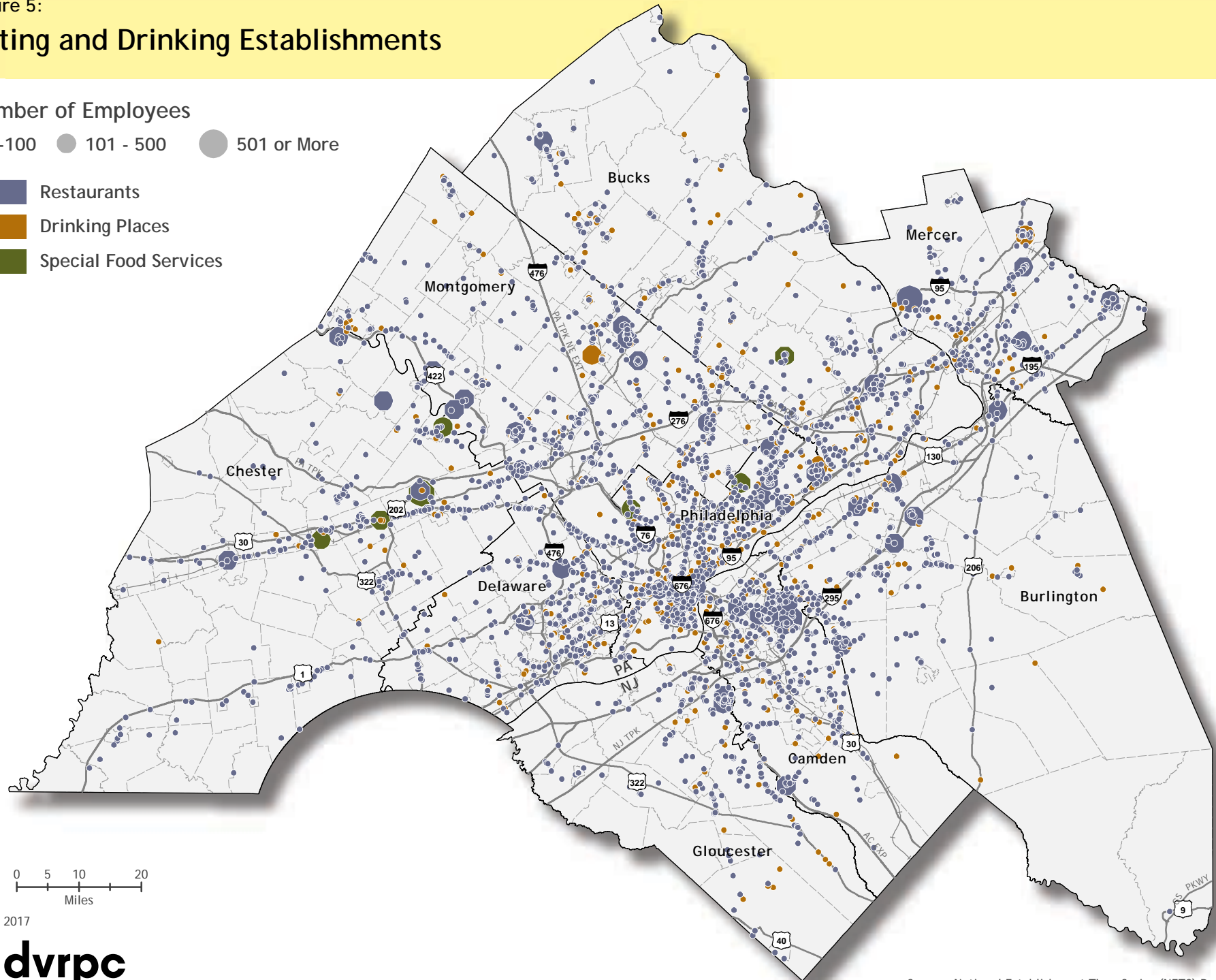


Figure 5:
Eating and Drinking Establishments

Number of Employees

- 5-100
- 101 - 500
- 501 or More

- Restaurants
- Drinking Places
- Special Food Services



June, 2017



Source: National Establishment Time-Series (NETS) Database, 2013

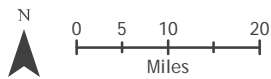
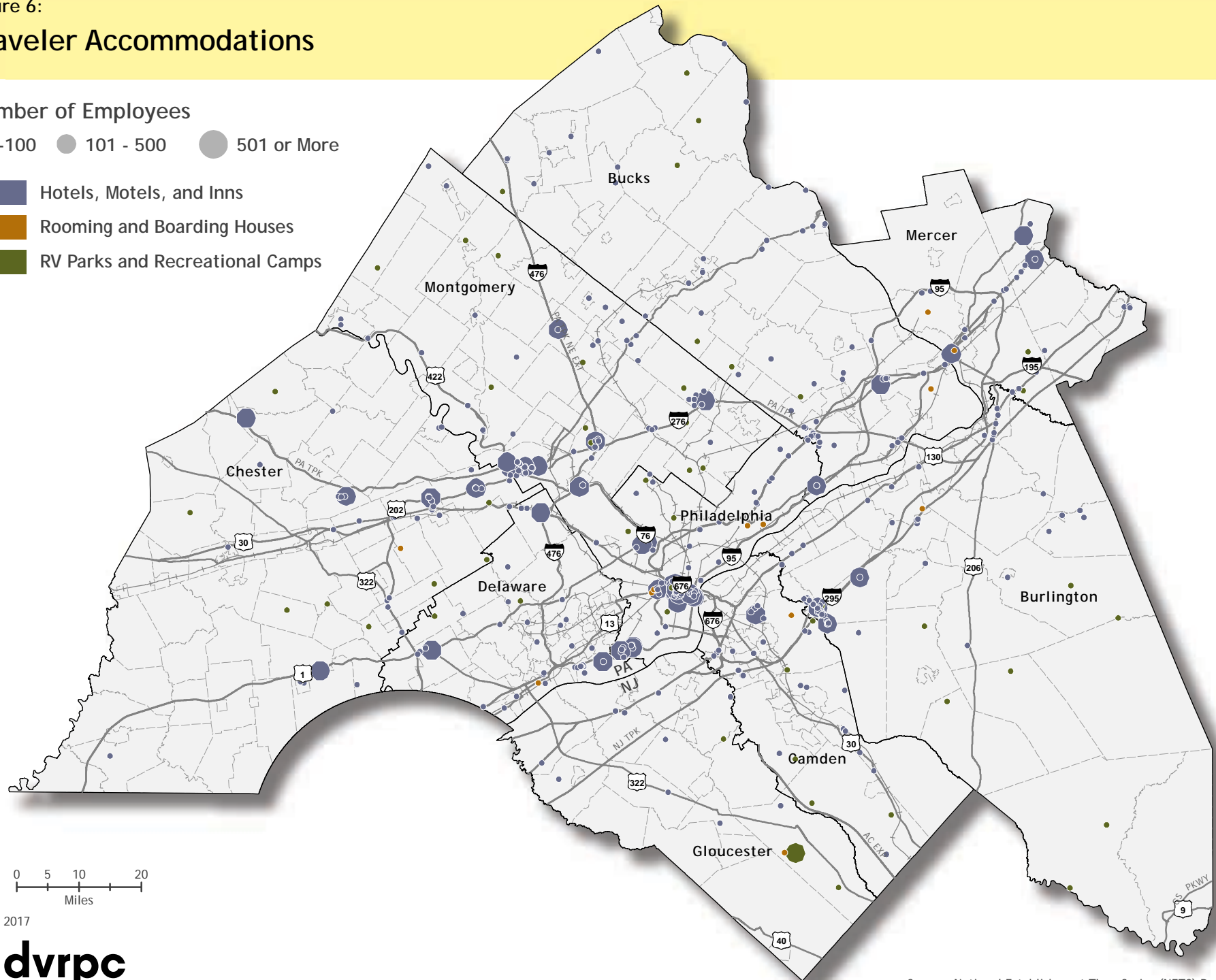
Figure 6:

Traveler Accommodations

Number of Employees

- 5-100
- 101 - 500
- 501 or More

- Hotels, Motels, and Inns
- Rooming and Boarding Houses
- RV Parks and Recreational Camps



June, 2017



Source: National Establishment Time-Series (NETS) Database, 2013

Figure 7:

Artists, Writers, Performers, and Promoters

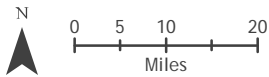
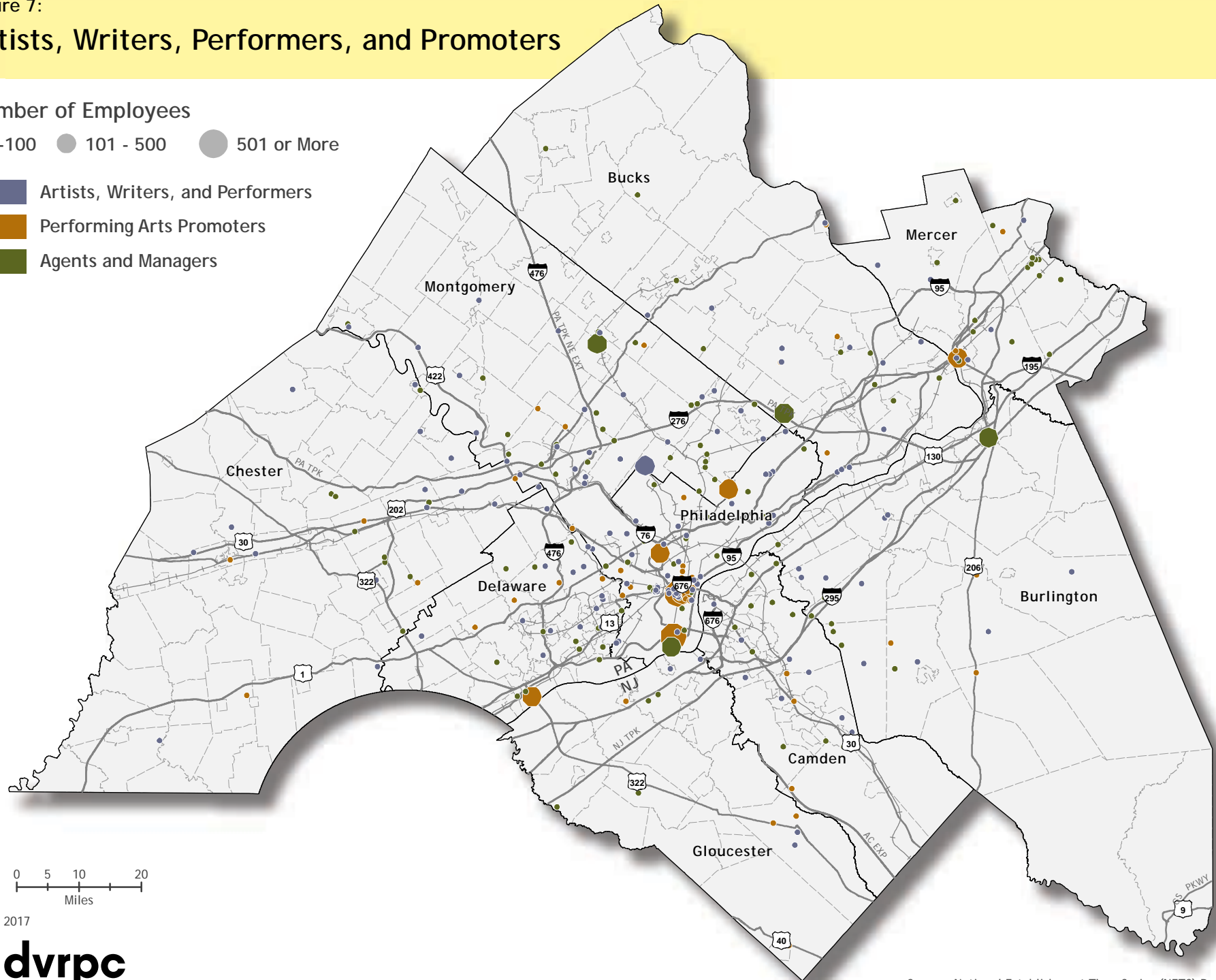
Number of Employees

- 5-100
- 101 - 500
- 501 or More

■ Artists, Writers, and Performers

■ Performing Arts Promoters

■ Agents and Managers



June, 2017



Source: National Establishment Time-Series (NETS) Database, 2013

Appendix A: Industries Included in the U.S. Cluster Mapping Project's Arts, Entertainment, Recreation, and Visitor Industries Cluster

Industry	NAICS Code
Manufacturing	
Sporting and athletic goods manufacturing	339920
Doll and stuffed toy manufacturing	339931
Game, toy, and children's vehicle manufacturing	339932
Wholesale Trade	
Sporting goods merchant wholesalers	423910
Transportation	
Scenic and sightseeing transportation, land	487110
Scenic and sightseeing transportation, water	487210
Scenic and sightseeing transportation, other	487990
Motion Picture and Sound Recording Industries	
Motion picture and video production	512110
Motion picture and video distribution	512120
Motion picture theaters, except drive-ins	512131
Drive-in motion picture theaters	512132
Teleproduction and postproduction services	512191
Other motion picture and video industries	512199
Record production	512210
Integrated record production and distribution	512220
Music publishers	512230
Sound recording studios	512240
Other sound recording industries	512290
Broadcasting	
Radio networks	515111
Radio stations	515112

Industry	NAICS Code
Television broadcasting	515120
Cable and other subscription programming	515210
Travel Arrangement and Reservation Services	
Travel agencies	561510
Tour operators	561520
Convention and visitors bureaus	561591
All other travel arrangement and reservation services	561599
Arts, Entertainment, and Recreation	
Theater companies and dinner theaters	711110
Dance companies	711120
Musical groups and artists	711130
Other performing arts companies	711190
Sports teams and clubs	711211
Racetracks	711212
Other spectator sports	711219
Promoters with facilities	711310
Promoters without facilities	711320
Agents and managers for public figures	711410
Independent artists, writers, and performers	711510
Museums	712110
Historical sites	712120
Zoos and botanical gardens	712130
Nature parks and other similar institutions	712190
Amusement and theme parks	713110
Amusement arcades	713120
Casinos, except casino hotels	713210
Other gambling industries	713290
Golf courses and country clubs	713910

Industry	NAICS Code
Skiing facilities	713290
Marinas	713930
Fitness and recreational sports centers	713940
Bowling centers	713950
All other amusement and recreation industries	713990
Accommodation and Food Services	
Hotels and motels, except casino hotels	721110
Casino hotels	721120
Bed-and-breakfast inns	721191
All other traveler accommodation	721199
RV parks and campgrounds	721211
Recreational and vacation camps	721214

Appendix B: Major Visitor Destinations

Top Attractions	Annual Visitors 2015
Independence National Historic Park	4,311,582
Sugar House Casino	3,600,000
Valley Forge National Historic Park	2,143,965
Peddler's Village	2,000,000
Longwood Gardens	1,300,000
Philadelphia Zoo	1,265,000
Franklin Square	1,000,021
The Franklin Institute	880,000
Philadelphia Museum of Art	751,797
Elmwood Park Zoo	500,000
Please Touch Museum	500,000
Eastern State Penitentiary Historic Site Inc.	350,795
National Constitution Center	286,567
Christ Church and Burial Ground	250,000
The Barnes Foundation	239,245
McGillin's Olde Ale House	238,000
Academy of Natural Sciences of Drexel University	230,000
Once Upon A Nation/Historic Philadelphia Inc.	188,794
Betsy Ross House	182,955
Penn Museum (University of Pennsylvania Museum of Archaeology and Anthropology)	174,031
Morris Arboretum of the University of Pennsylvania	132,460
Independence Seaport Museum	125,000
Battleship New Jersey Museum and Memorial	93,000
Brandywine River Museum of Art	84,500
Hopewell Furnace National Historic Site	51,252

Golf Courses	Slope Rating ¹
Pine Valley Golf Club	155
Trump National Golf Club-Philadelphia	153
Commonwealth National Golf Club	151
Talamore Country Club	147
Laurel Creek Country Club	146
Medford Village Country Club	146
Merion Golf Club–East	146
Doylestown Country Club	145
Lookaway Golf Club	145
ACE Club	143
Blue Bell Country Club	143
Rolling Green Golf Club	143
Golf Course at Glen Mills	142
Whitemarsh Valley Country Club	142
French Creek Golf Club	141
Union League Golf Club at Torresdale	141
White Manor Country Club	141
Philadelphia Cricket Club– Wissahickon	140
RiverCrest Golf Club and Preserve	140
Tavistock Country Club	140
Wyncote Golf Club	140
Applebrook Golf Club	139
Broad Run Golfer's Club	139
Chester Valley Golf Club	139
Huntingdon Valley Country Club Centennial/Toomey	139
Lederach Golf Club	139

¹ From Wikipedia: A slope rating is computed from the difference between the bogey rating and the USGA course rating. A golf course of standard playing difficulty has a slope rating of 113, and slope ratings range from a minimum of 55 (very easy) to a maximum of 155 (extremely difficult).

Meeting Spaces	Total Square Feet
Pennsylvania Convention Center	1,000,000
Lincoln Financial Field	845,000
Philadelphia Museum of Art	99,338
Kimmel Center for the Performing Arts	51,800
Penn Museum	51,000
Chubb Hotel and Conference Center (formerly the ACE Center)	50,000
Liberty View Ballroom at the Independence Visitor Center	50,000
Loews Philadelphia Hotel	47,000
Drexelbrook Corporate Events Center	35,000
SugarHouse Casino	30,000
Battleship New Jersey Museum and Memorial	30,000
Normandy Farm Hotel & Conference Center	30,000
Springfield Country Club	26,230
Desmond Hotel	26,000
National Liberty Museum	24,000
Union League of Philadelphia	22,000
Radisson Hotel Philadelphia Northeast	20,000
Sheraton Philadelphia Society Hill Hotel	20,000
Sonesta Philadelphia Downtown	16,000
The Conference Center at The Chemical Heritage Foundation	13,500
Hotel Monaco Philadelphia	13,000
National Museum of American Jewish History	10,000
WHYY Inc.	8,000
Rodin Museum	6,300

Casinos	Total Gross Revenue
Parx Casino	\$507.55 million
Harrah's Philadelphia	\$284.67 million
Sugar House Casino	\$270.23 million
Valley Forge Casino Resort	\$109.29 million

Professional Sports Venues	Municipality
Lincoln Financial Field	Philadelphia, Pennsylvania
Wells Fargo Center	Philadelphia, Pennsylvania
Citizens Bank Park	Philadelphia, Pennsylvania
Talen Energy Stadium	Chester, Pennsylvania
Arm & Hammer Park	Trenton, New Jersey

Source: Philadelphia Business Journal, May 2017.

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Abstract: This report assesses the importance of hospitality and tourism in Greater Philadelphia's regional economy. The tourism economy spans multiple economic sectors, including not only visitor attractions themselves but also lodging, recreation, retail activity, real estate, air and rail passenger travel, food and beverage establishments, car rentals, taxi services, and travel agents. This report focuses on two specific economic sectors: arts, entertainment, and recreation (companies that list 71 as their primary two-digit NAICS code), and accommodations and food services (companies with 72 as their two-digit NAICS code).

The goal of this snapshot is to provide basic background information on hospitality and tourism in Greater Philadelphia, including the overall impact of the industry on the region's economy, the locations and scale of the region's primary tourist destinations, and regional employment related to hospitality and tourism. The report will serve as background information for future DVRPC work on travel and tourism.

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