

ECONOMIC IMPACT OF TOURISM IN CLARK COUNTY, OHIO 2020

Prepared for:
TourismOhio



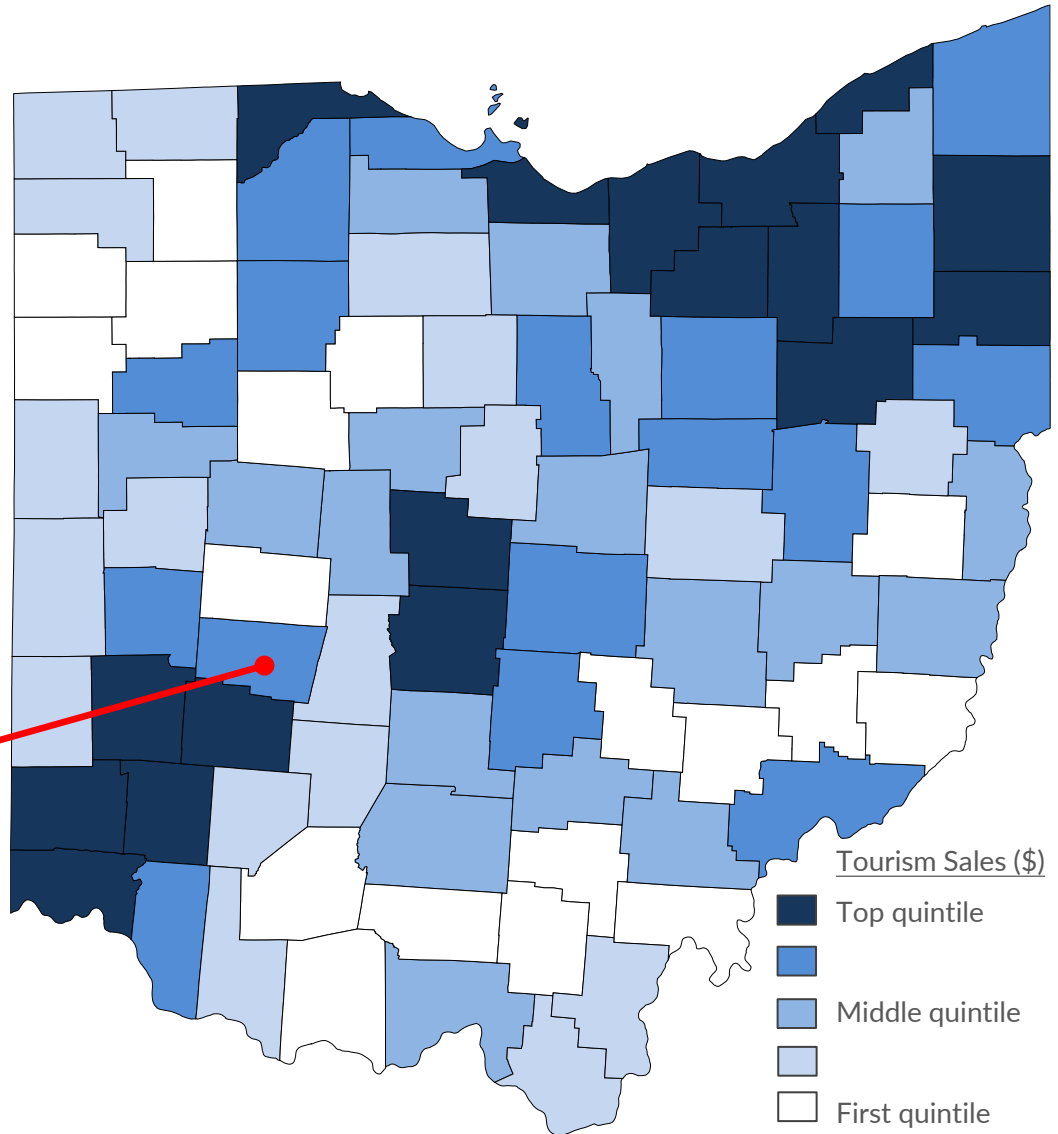
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KEY FINDINGS

Clark County

Clark County, Ohio	Tourism impact
Sales	\$372.3 million
Wages	\$97.8 million
Taxes	\$50.3 million
Employment	3,953

Clark County



KEY FINDINGS

Clark 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 Clark County economy and continues to be a key driver of business sales, employment, and tax revenue.

Approximately 7.9% of all private jobs in the County were sustained by tourism.



Visitor Spending

Visitors to Clark County spent \$229 million in 2020, which generated \$372 million in business sales when including indirect impacts.



Employment Generator

A total of 3,953 jobs were sustained by visitors to Clark County in 2020. This included 2,892 direct and 1,061 indirect and induced jobs.



Fiscal Contributions

Tourism in Clark County generated \$50.3 million in tax revenues in 2020, with \$24.1 million accruing to state and local governments.



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.

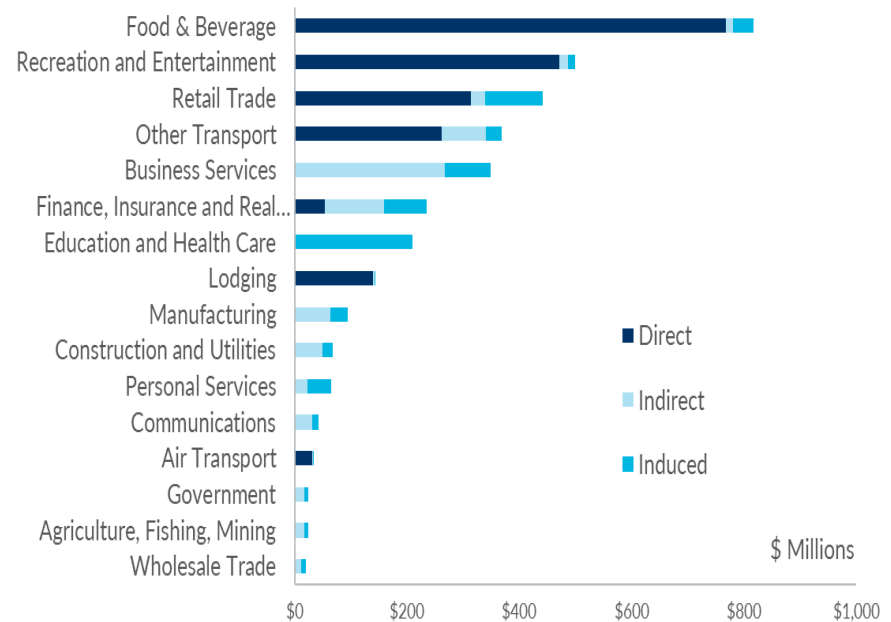
SOUTHWEST OHIO IMPACT

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

CLARK COUNTY IMPACTS

ECONOMIC IMPACTS

Direct sales in the County and region

Clark County visitor spending decreased 20.8% in 2020, a decline less severe than that of the region and the state overall.

Direct sales trends

	2018	2019	2020
Clark County direct sales trends:			
Sales volume (\$mils)	277.8	289.1	228.9
Sales growth, % change	1.1%	4.1%	-20.8%
Wider region and state direct sales trends:			
Southwest Ohio sales growth, % change	3.9%	5.8%	-24.9%
Ohio sales growth, % change	8.3%	4.0%	-24.5%

Source: Tourism Economics

ECONOMIC IMPACTS

Business sales impacts by industry

Tourism generated \$372.3 million in total business sales in Clark County.

Business sales impacts by industry

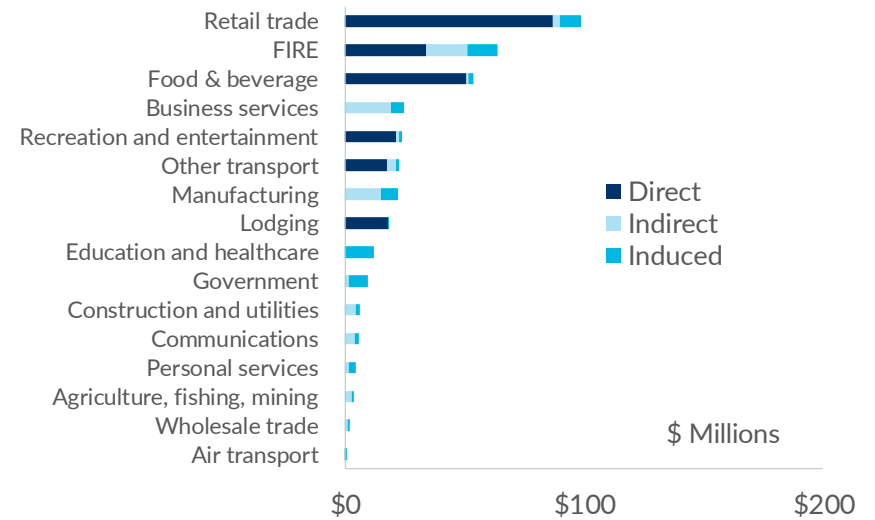
Amounts in millions of current dollars	Direct sales	Indirect sales	Induced sales	Total sales
Total, all industries	\$228.9	\$75.9	\$67.5	\$372.3
By industry				
Retail trade	\$87.0	\$2.9	\$8.8	\$98.7
FIRE	\$34.1	\$17.1	\$12.6	\$63.8
Food & beverage	\$50.7	\$0.7	\$2.2	\$53.6
Business services	\$0.0	\$19.1	\$5.4	\$24.5
Recreation and entertainment	\$21.5	\$1.2	\$0.9	\$23.7
Other transport	\$17.5	\$3.7	\$1.4	\$22.6
Manufacturing	\$0.0	\$14.9	\$7.3	\$22.1
Lodging	\$17.9	\$0.2	\$0.2	\$18.4
Education and healthcare	\$0.0	\$0.1	\$12.0	\$12.0
Government	\$0.0	\$1.7	\$8.0	\$9.7
Construction and utilities	\$0.0	\$4.4	\$1.8	\$6.2
Communications	\$0.0	\$3.9	\$1.9	\$5.8
Personal services	\$0.0	\$1.8	\$3.0	\$4.7
Agriculture, fishing, mining	\$0.0	\$2.6	\$1.1	\$3.7
Wholesale trade	\$0.0	\$1.3	\$0.8	\$2.1
Air transport	\$0.3	\$0.2	\$0.2	\$0.6

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 3,953 jobs in Clark County.

Employment impacts by industry

Amounts in number of jobs	Direct jobs	Indirect jobs	Induced jobs	Total jobs
Total, all industries	2,892	524	538	3,953
By industry				
Food & beverage	1,452	23	62	1,536
Retail trade	445	24	107	577
Other transport	356	55	19	431
Recreation and entertainment	275	26	17	318
Lodging	272	4	3	279
Business services	-	180	52	233
FIRE	92	88	49	229
Education and healthcare	-	2	144	146
Personal services	-	18	43	61
Manufacturing	-	33	14	48
Agriculture, fishing, mining	-	22	8	30
Construction and utilities	-	18	4	22
Communications	-	15	5	20
Government	-	9	4	13
Wholesale trade	-	6	4	9
Air transport	-	1	1	1

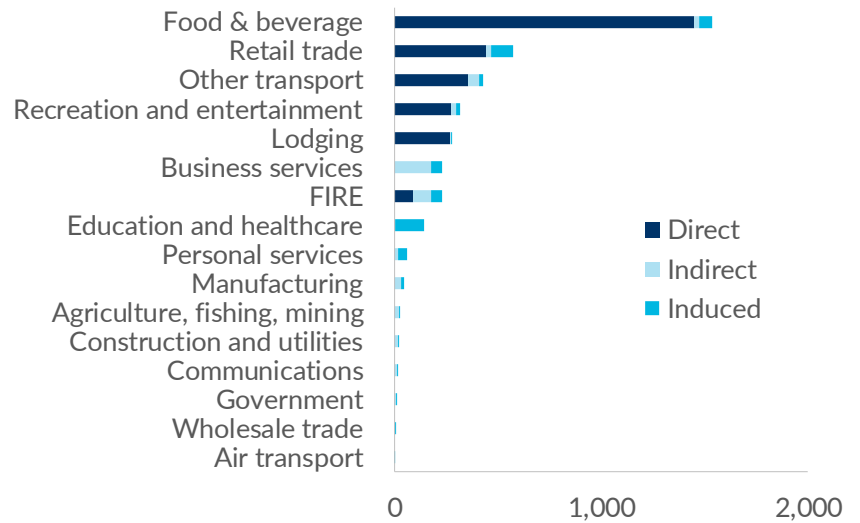
Source: Tourism Economics

ECONOMIC IMPACTS

Employment impacts by industry

The 3,953 jobs generated by tourism across several industries represented 7.9% of total county employment in 2020.

Employment impacts by industry



Source: Tourism Economics

ECONOMIC IMPACTS

Personal income impacts by industry

Tourism generated \$97.8 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	\$58.8	\$20.3	\$18.7	\$97.8
By industry				
Food & beverage	\$26.8	\$0.4	\$1.0	\$28.2
Retail trade	\$11.3	\$0.7	\$2.8	\$14.8
Other transport	\$10.3	\$2.2	\$0.8	\$13.3
Business services	\$0.0	\$7.5	\$2.3	\$9.8
FIRE	\$2.2	\$3.0	\$2.1	\$7.2
Education and healthcare	\$0.0	\$0.0	\$5.8	\$5.8
Recreation and entertainment	\$4.2	\$0.4	\$0.3	\$4.9
Lodging	\$4.1	\$0.1	\$0.1	\$4.2
Manufacturing	\$0.0	\$1.8	\$0.8	\$2.6
Construction and utilities	\$0.0	\$1.4	\$0.5	\$1.9
Personal services	\$0.0	\$0.7	\$1.2	\$1.8
Communications	\$0.0	\$0.9	\$0.3	\$1.2
Government	\$0.0	\$0.5	\$0.2	\$0.7
Agriculture, fishing, mining	\$0.0	\$0.5	\$0.2	\$0.7
Wholesale trade	\$0.0	\$0.3	\$0.2	\$0.6
Air transport	\$0.0	\$0.1	\$0.0	\$0.1

Source: Tourism Economics

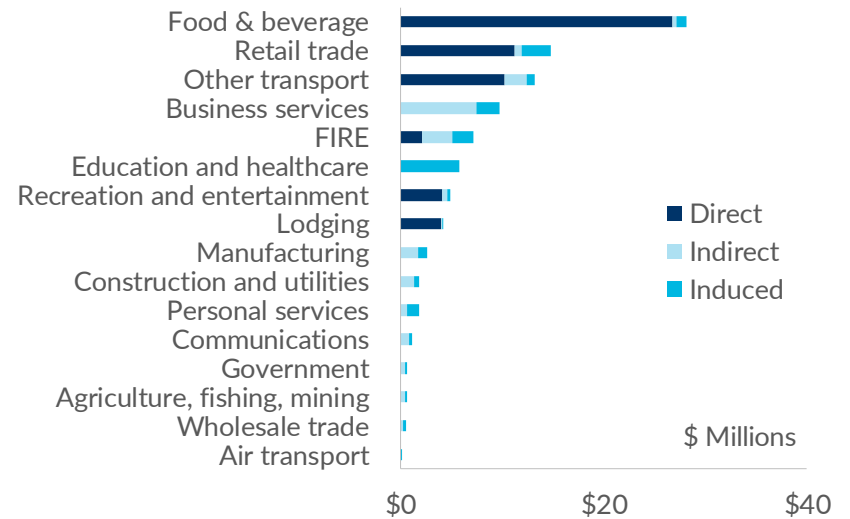
ECONOMIC IMPACTS

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 \$50.3 million in tax revenues, including \$24.1 million in state and local revenues.

Tourism tax revenues saved households in-county \$441 per household in 2020.

Tourism-generated tax revenues in 2020

Amounts in nominal dollars	Taxes generated
Total tax revenues	\$50,264,986
Federal Taxes	\$26,166,757
State Taxes	\$14,041,024
Local Taxes	\$10,057,205
State/Local Tax Savings Per Household	\$441

Source: Tourism Economics