

# VISITATION ANALYSIS FOR CENTRE COUNTY, PA

Prepared for:  
The Happy Valley Adventure Bureau



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# CENTRE COUNTY VISITATION ESTIMATES

Centre County/Visit Penn State CVB has engaged Tourism Economics to update visitation estimates to Centre County last done in 2018.

Visitation estimates have been calculated using data from Centre County and Tourism Economics' work with the state of Pennsylvania.

Visitation has been calculated in several different manners with the final results reflecting Centre County visitation and pegged to regional totals from the state work for ease of comparison in the future.

## Data Sources:

- STR – room demand information for both the county and region
- Visitor survey information
  - DKS survey information specific to Centre County
  - Longwoods visitation estimates for the region
- VisaVue data (credit card purchases in the county)
- 2nd home data – from economic census
- Household information – from U.S. Dept. of Census
- Industry information – QCEW wage data
- State Park visitation – DCED

# KEY DATA

Key data for 2020 include:

- STR room demand – 320-350K in Centre County in 2020, down about 50% from 2019 levels.
- Historical visitor survey information
  - 65% stay in Paid Accommodations, 11% in Paid – Non-Hotel, 24% in non-paid Lodging in Centre County.
  - Average travel party size of 1.68.
  - Average length of stay of 1.85 days.
- Longwoods visitation estimates for the region – 11.3 million visitors of which 4.1 million were overnight guests in 2019. Visitation estimates for the region for 2020 were not available at time of report.
- VisaVue domestic cardholder – use down 31% in 2020, 38% in key Q4.
- 2nd home data:
  - ~4,100 2nd homes in Centre County
  - An increase of 18% over 2018
  - ~15,400 2nd homes in Alleghenies and her Valleys
  - Up 8% since 2018
- Household information:
  - 162,400 households in Centre County
  - ~600,000 households in the region
  - Household numbers holding steady compared to 2018

# METHODOLOGY

Data from two geographies were used in calculating the estimates:

- Centre County specific data
- Alleghenies and her Valleys data – consisting of Bedford, Blair, Cambria, Centre, Fulton, Huntingdon, Juniata, and Mifflin County

Regional visitation estimates are available through 2019 from the state's work with Longwoods International, these are used as controls for the area.

County-specific information is used to break out visitation to Centre County.

Room demand information used for overnight hotel stay calculations.

This calculation included data on length of stay and party size.

2nd home data, state park visitation were used as a proxy for other paid overnight stays.

Household information, state park visitation was used in the estimate of non-paid lodging.

Along with the overnight information, day visitation estimated included information on industry shares of the region. Industries examined include:

- Recreation
- Food & beverages (restaurants)
- Retail

VisaVue cardholder activity in Centre County was also used as an indicator of day visitor activity

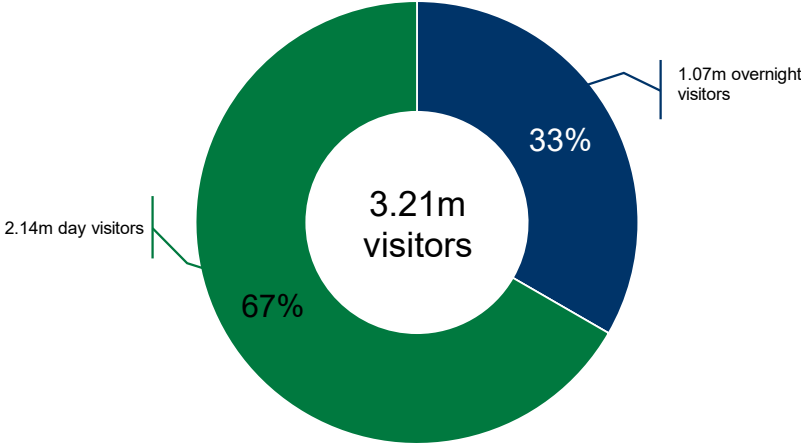
# TOTAL VISITATION

Centre County saw 3.2 million visitors in 2020.

Of those visitors, 1.1 million, 33%, were overnight visitors. Day visitation levels in 2020 saw 2.1 million visitors.

## Centre County Visitation

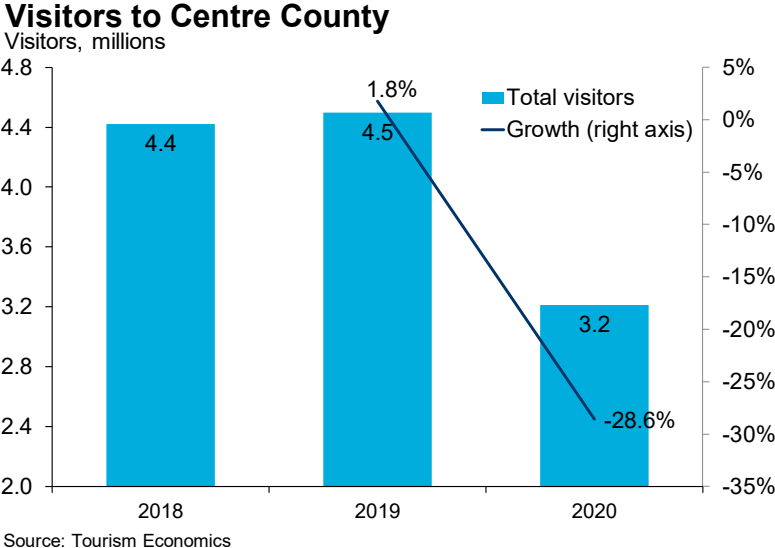
Millions and percent of total



Source: Tourism Economics

# VISITATION TIMELINE

Visitation reached 4.5 million in 2019. Visitation dropped 29% in 2020 to an estimated 3.2 million visitors.



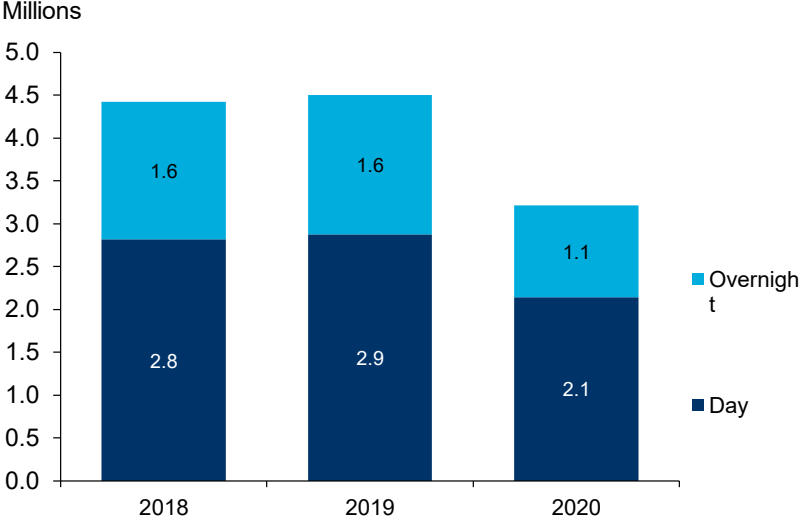
# VISITATION TIMELINE

Looking at the day and overnight visitation sectors over time, overnight visitation reached 1.6 million in 2019 before falling to 1.1 million in 2020.

Day visitation fell to 2.1 million in 2020, a drop of 25%.

Visitation fell a total of 1.3 million between 2019 and 2020, a decline of 29%.

### Centre County visitor timeline



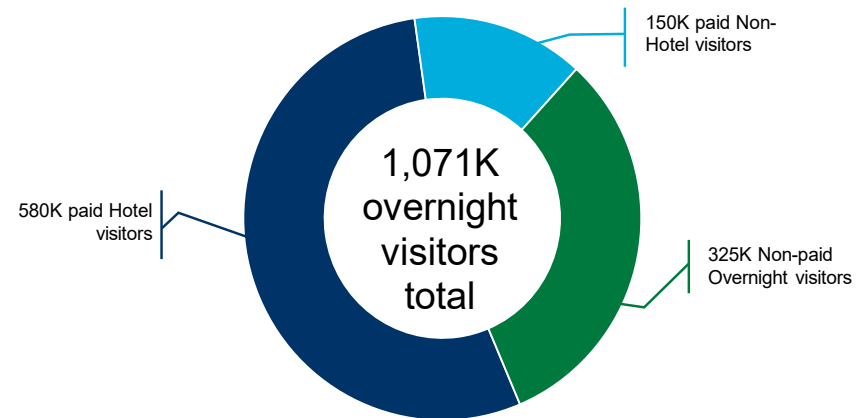
Source: Tourism Economics

# OVERNIGHT VISITATION

Of the 1.1 million overnight visitors, 580,000 were paid hotel visitors with another 325,000 non-paid overnight stays.

Non-hotel visitors in 2020 numbered 150,000.

**Centre County overnight visitors**  
Thousands



Source: Tourism Economics



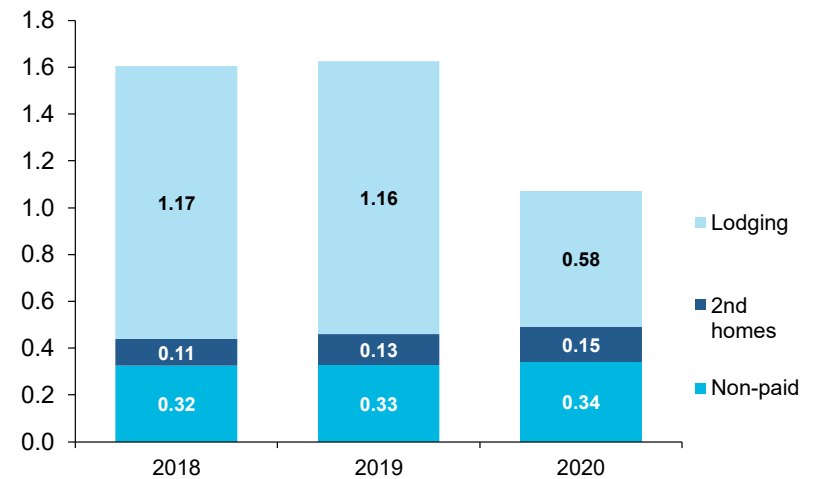
# OVERNIGHT VISITATION TIMELINE

Of the 1.1 million overnight visitors in 2020, just over half stayed in paid-lodging. This is a drop of about 50% from 2019 levels.

While lodging stays fell, stays at 2nd homes and non-paid accommodations rose slightly. State park visitation was up 15% in the county.

### Centre County overnight visitor breakout

Millions



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.

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