

The Economic Impact of Travel in Pennsylvania

Tourism Satellite Account
Calendar Year 2015



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State Overview



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State Overview

- Spending by Pennsylvania travelers and tourists grew for the sixth straight year in 2015, with the rate of increase (2.9%) more than double that of the previous year. Total traveler spending (presented at times in the report as “travel & tourism industry sales”) grew to \$40.8 billion in 2015 – up from \$39.7 billion in 2014 and \$39.2 billion in 2013.
 - A 1.5% increase in the number of travelers was responsible for a portion of the increase in total traveler spending from 2014, with an estimated 195.6 million domestic and international visitors traveling to and/or within Pennsylvania in 2015, up from 192.8 million in 2014.
 - Overnight visitation continued to show a steady increase with the number of hotel room nights sold (i.e., demand) up 2.0% from 2014.
 - Per trip spending increased – a combination of higher prices, especially for lodging, as well as improved consumer confidence and travelers’ willingness to spend more at restaurants, attractions, and retail establishments as the cost for transportation declined.
- Traveler spending generated an estimated \$71.6 billion in total economic activity (including indirect and induced impacts) throughout all industries in Pennsylvania in 2015 – a nearly 3% increase from 2014.

Key Results

- Travel and tourism-related economic activity supported 489,390 PA jobs in total (*i.e., includes direct, indirect and induced jobs*) in 2015 – up 1.4%, and representing 6.5% of the state’s total employment count as in 2014..
- The growth rate for Pennsylvania’s travel-related (direct) and travel-supported (indirect) jobs in 2015 was nearly twice the rate of increase (0.8%) for all non-farm jobs in the state.
- The state’s travel and tourism sector was directly responsible for an estimated \$17.7 billion of the state’s 2015 Gross Domestic Product (GDP) – a 4.8% increase from 2014.
- Including indirect and induced impacts, PA’s travel and tourism industry generated \$4.4 billion in state and local taxes and \$4.5 billion in federal taxes in 2015.

On average, the spending of every 405 travelers to and/or within supports one PA job.

One out of every 15.4 employees in Pennsylvania is supported by travel and tourism.

Why quantify the tourism economy

Challenges in measuring tourism economy

Explanation of Tourism Satellite Account (TSA)

Key definitions



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Why quantify the tourism economy?

- By monitoring the impact of PA's travel and tourism industry's on the state's economy, policymakers can make informed decisions regarding the funding and prioritization of tourism development.
- Monitoring and quantifying travel and tourism's economic impact also enables policymakers and those involved in the industry to carefully monitor the industry's successes and determine future needs.
- In order to do this, tourism must be measured in the same manner as other economic sectors – i.e., tax generation, employment, wages, and gross domestic product.

Why is this a challenge?

- Most industry sectors, such as manufacturing, construction, financial services, insurance, and health care, for example, are easily defined within the country's national accounts statistics, with economic data specific to each industry computed and provided according to the industry's NAICS (North American Industry Classification System) code.
- The economic contributions of travel and tourism are not so easily measured and calculated because it is not a single industry but is responsible for varying amounts of economic activity in nearly a dozen industrial sectors, including lodging, recreation, retail, real estate, air passenger transport, food & beverage, car rentals, taxi services, and travel agents that are identified in the national accounts and each with its own unique NAICS code.
- A major challenge is determining the amount of economic activity attributable to travel and tourism by each of these industries versus the amount attributable to local residents. The share attributable to travelers differs for each industry, both directly and indirectly.

The Tourism Satellite Account

- The Tourism Satellite Account, or TSA, was conceived by the United Nations World Tourism Organization to estimate the total economic impact of the tourism industry on a nation's economy, including capital investment and government spending in addition to traveler spending.
- The TSA standard has since been ratified by the United Nations, Eurostat, and the Organization for Economic Cooperation and Development (OECD) and has been adopted by over 50 countries around the world, including the U.S., as well as a growing number of states.
- The U.S. Bureau of Economic Analysis (BEA) uses the TSA methodology to determine the economic contributions of business and leisure travelers to the U.S. economy, issuing quarterly and annual estimates for the nation under the Travel and Tourism Satellite Account (TTSA).
- The BEA presents TTSA estimates of traveler spending on 24 types of goods and services, as well as estimates of the income generated by travel and tourism and the output and employment generated by U.S. travel and tourism-related industries.

Benefits of the Tourism Satellite Account

Benefits of using the TSA methodology include:

- Provides a stable and consistent definition of the travel and tourism economy.
- Provides a methodology for calculating travel and tourism Gross Domestic Product (GDP) in a way that is consistent with economic accounts and that enables comparisons of the importance of travel and tourism relative to other sectors of the economy in terms of GDP, employment, and income.
- Allows for benchmarking relative to other destinations.
- Tracks the economic contribution of the travel and tourism industry over time.
- Monitors the industry's strength by tracking capital investments made in travel- and tourism-related projects.
- Allows for an analysis of the full impact of travel and tourism, i.e., the direct impact from sales made to travelers, the indirect impact from supplier contributions, induced impact derived from the spending of persons employed either directly or indirectly in the travel and tourism economy, government spending, and private sector investments.

Key Definitions

1. **Tourism/Tourist:** Refers to the leisure travel/traveler segment.
2. **Travel/Traveler:** Includes both leisure and business travel/travelers.
3. **Travel and Tourism Industry:** The value of traveler activity within “travel characteristic industries.” This concept measures only the direct impact of the travel industry from the sales made to travelers.
4. **Travel and Tourism Economy:** The value of traveler activity plus government spending and capital investment in support of travel and tourism and certain personal consumption expenditures. This is the basis of the total economic impact analysis, including the direct impact and the downstream indirect and induced impacts.
5. **Visitor (or Traveler) Spending:** Estimates of the dollars travelers spent on their trip, derived from the self-reported expenditures on a national survey of U.S. travelers. The state level data also includes estimates of the spending by international travelers from Canada and overseas markets in the total(s).
6. **Direct Sales:** The term used to portray visitor spending for the major categories of travel-related expenditures and equates to visitor/traveler spending.

Key definitions

7. **Economic Impact:** Analysis that traces the flows of spending associated with travel activity within a specific geographic area to identify changes in sales, tax revenues, income and jobs derived from travelers.
8. **Direct Impact:** The economic impact – including jobs and income – from the initial sales made by travelers. Examples include sales made by travelers at lodging properties, souvenir shops, restaurants, gas stations, amusement parks, museums, etc.
9. **Indirect Impact:** The economic impact from the production, employment, and income occurring in other businesses/industries that supply the businesses making initial/direct sales to travelers. Examples of indirect impact include a restaurant's food supplier or a hotel's laundry service.
10. **Induced Impact:** The economic impact from the spending by households in the local economy as the result of the earnings from a business that directly or indirectly interacts with travelers. Examples include hotel desk clerks who use their wages to pay for their groceries and the accountants who work for companies that supply napkins and other goods to a restaurant frequented by travelers and who use their wages to purchase flowers from the local florist.

Key Definitions

- 11. Jobs/Employment:** Estimates of the number of jobs – both full-time and part-time – supported by travel and tourism, reflecting the annual average number of monthly jobs supported by travel and tourism throughout the year and includes wage and salary jobs, sole proprietorships, and individual general partners, but not unpaid family workers or volunteers. Note: The jobs estimates are not on a full-time-equivalent basis.
- 12. Labor Income:** Estimates of Employee Compensation (i.e., wages and benefits) and Proprietor Income including the profits realized by business owners derived from businesses supported by Pennsylvania's travel and tourism industry.
- 13. Transportation:** Estimates of traveler spending on transportation are derived from the self-reported spending of travelers on surveys by Longwoods International. This spending may include purchases of gasoline and airline, bus, or train tickets, as well as costs for parking, tolls, car repairs while traveling, etc.

Key Definitions – Spending Categories

Spending Category	Description
Lodging	Includes traveler spending in the accommodations sector and includes food and other services provided by hotels and similar establishments.
Recreation	Includes all traveler spending within the arts, entertainment and recreation sector.
Air transportation	Includes the local economic activity generated by travelers within the air transport (airline) and support services (on airport) sectors.
Other transport	Includes all forms of local transportation services, e.g., taxis, limos, trains, rental cars, and buses.
Shopping	Includes traveler spending within all retail sectors.
Service stations	Traveler spending on gasoline, with just the margin included for the local economic impact.
Second homes	Spending associated with the operation of seasonal second homes for recreational use, as defined by the U.S. Census Bureau and based on an “imputed rent” calculation over an estimated peak season.
Food and beverage	Includes all traveler spending at restaurants and bars.

Spending Impacts



Travelers spend their \$\$ at a wide variety of businesses, including museums, restaurants, lodging facilities, events and attractions, gas stations, airports, retail shops, travel agents, and many others. This is the **direct impact**.

Businesses Catering to the Traveling Public



Wages
paid to
employees

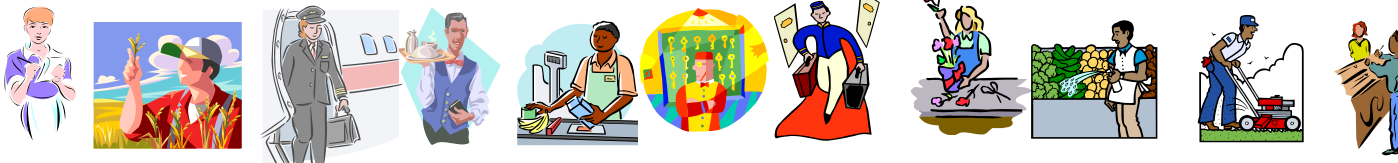


The businesses that directly cater to the traveling public purchase a wide variety of goods and services from suppliers, manufacturers, and service companies. This is the **indirect impact**.

Manufacturers, Supplier and Support Businesses



The employees of the businesses catering to the traveling and the manufacturers, supplier and support companies whose wages are either direct or indirectly derived from visitor spending, in turn spend their wages at local businesses. This is the **induced impact**.



Illustrating the Concepts

Travel & Tourism Industry

- The direct effect of tourism spending
- Focus of Tourism Satellite Account

Travel & Tourism Economy

The flow-through effect of all tourism demand across the economy

- Expands the focus to measure the overall impact of tourism on all sectors of the economy



Detailed State Results

Total U.S. & International Traveler Spending
Key Trends
Travel Segments
Spending Categories



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Key Travel Trends in 2015

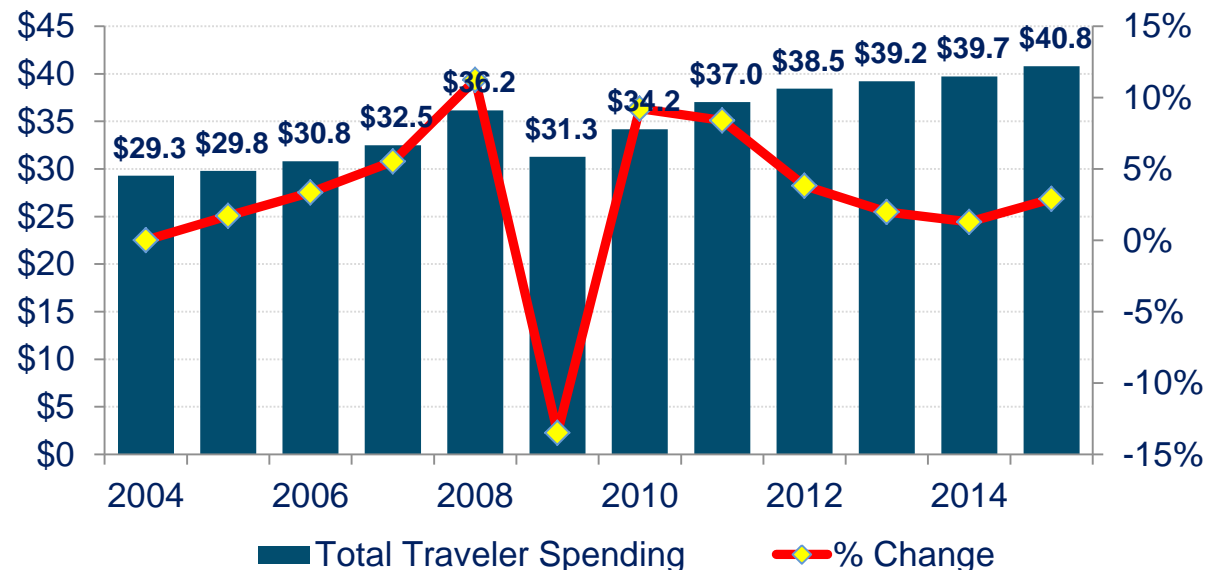
- Travel and tourism continued to be an integral component of Pennsylvania's economy in 2015, with visitor spending (*aka "industry sales"*) directly injecting \$40.8 billion into the state's economy – a 2.9% increase from 2014 and new record high.
- Both overnight and day-trip travelers contributed to the increase in spending, with the strongest growth from the leisure overnight segment (+4.0%).
- As in 2014, the continued drop in transportation costs was a major contributor to the increase in spending for other categories of traveler spending in 2015 – categories that typically have a greater impact on the overall economy.
- Spending increases were strongest in the lodging (4.6%) and food & beverage sectors (3.7%), followed by recreation (3.2%). The increased spending on lodging was due both to an increase in the number of travelers and modest price increases.

Stronger Growth in PA Traveler Spending in 2015

- PA's total visitor spending (i.e., spending by both international and domestic travelers) reached a record high \$40.8 billion in 2015.
- 2015 marked the sixth straight year of increases in traveler spending.
- Spending by PA's overnight leisure travelers (4.0%) outpaced that of the leisure day-trip segment (2.4%) in 2015, but an exceptionally strong increase in business day-trip travel caused the daytrip segment overall to outpace that of overnight.

Total traveler spending in Pennsylvania

(in billions of U.S. dollars)



Includes spending by both domestic and international travelers

Source: Tourism Economics

PA 2015 Traveler Spending by Market Segment

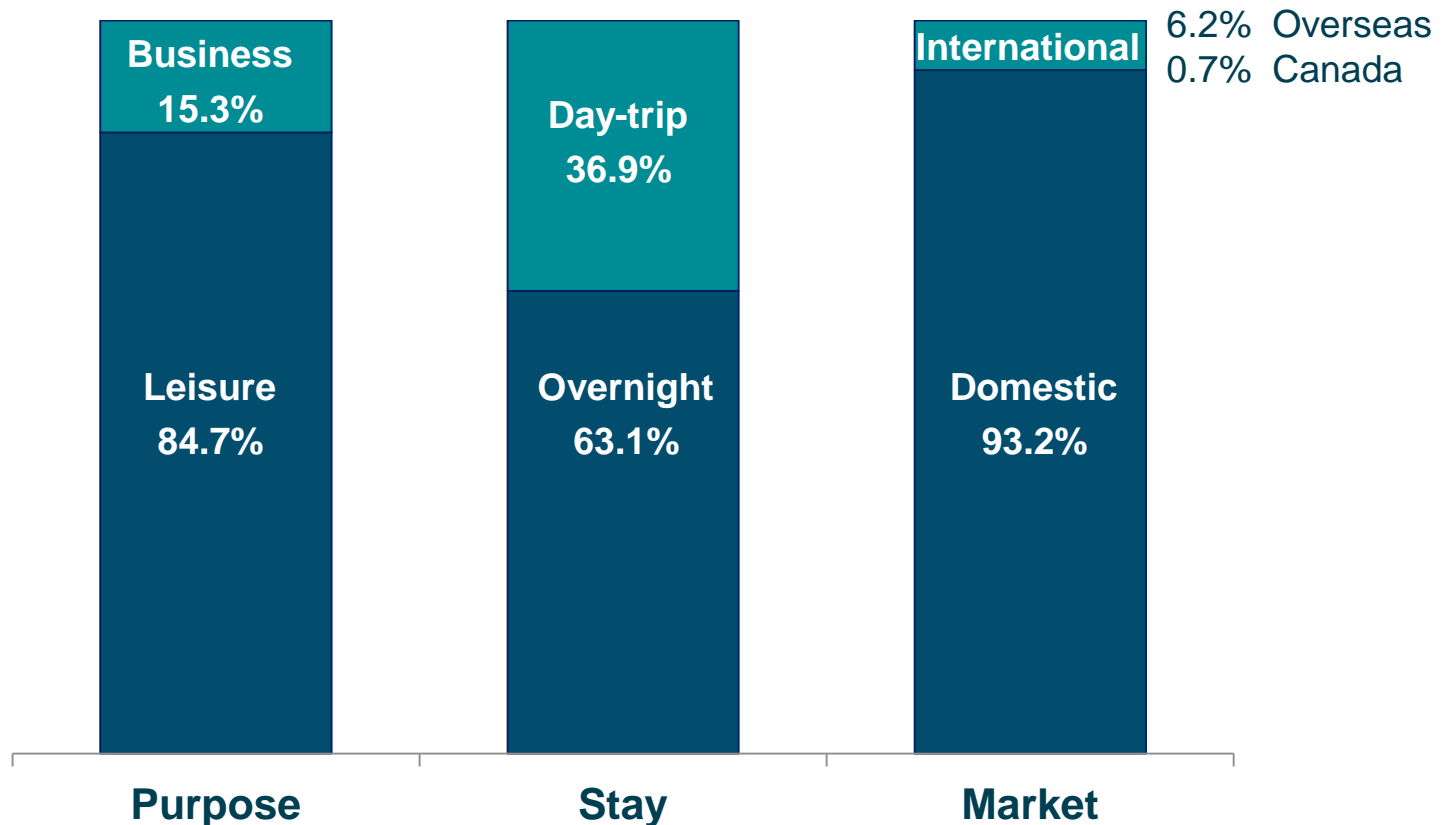
- Spending by PA's leisure travel segment was far stronger than that of business travel in 2015, leading to an increased share of the state's total travel market by the leisure segment.
- While the growth rate in spending by PA's day-trip segment was above that of the overnight segment in 2015, overnight travelers outspent day-trip travelers by \$10.7 billion, or by a margin of \$1.70 to \$1.00.

2015 Traveler Spending* by Segment (in billions of U.S. dollars)					
Purpose		Stay		Market	
Leisure	\$34.6	Overnight	\$25.8	U.S. Domestic	\$38.0
Business	\$ 6.3	Day-trip	\$15.1	Overseas	\$ 2.5
				Canada	\$ 0.3
Total	\$40.8	Total	\$40.8	Total	\$40.8
Growth Rate					
Leisure	3.4%	Overnight	2.6%	U.S. Domestic	2.9%
Business	0.3%	Day-trip	3.4%	Overseas	3.3%
Total	2.9%	Total	2.9%	Canada	-2.4%
Market Share					
Leisure	84.7%	Overnight	63.1%	U.S. Domestic	93.2%
Business	15.3%	Day-trip	36.9%	Overseas	6.2%
				Canada	0.7%

**Includes total spending by both domestic and international travelers and includes the portion of travel expenses incurred by visitors getting to and from Pennsylvania that is attributable to PA (e.g., the portion of an airline ticket accruing to a PA airport, along with the PA portion of the ticket a traveler bought leaving the state) as calculated by the TSA model.*

Distribution of Traveler Spending by Market Segment

- As in prior years, U.S. domestic, total leisure, and total overnight travel remained the dominant segments for PA's travel and tourism industry in 2015.



Source: *Tourism Economics* - Shares for "Purpose" and "Stay" include spending by both domestic and international travelers.

Traveler Spending by Type of Visitor, 2014 & 2015

- The increase in total traveler spending in 2015 was primarily derived from leisure travel, with spending by business travelers up slightly (0.3%) from 2014.
- The drop in business traveler spending was completely due to the overnight segment (-3.1%), while spending by business day-trip travelers rose 16.3% – by far, the strongest of the four travel segments.

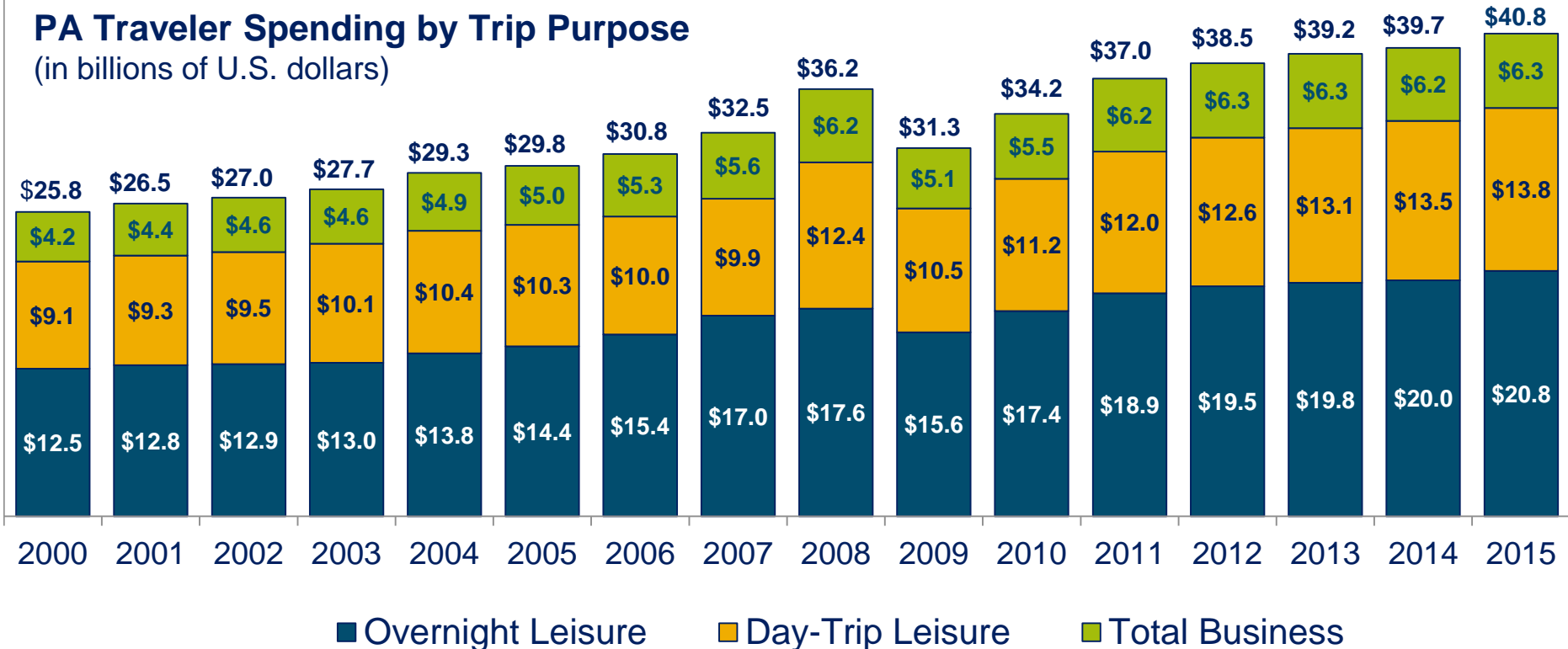
Traveler Spending by Visitor Type (in billions of U.S. dollars)			
2015	Leisure	Business	Total
Overnight	\$20.8	\$5.0	\$25.8
Day-Trip	\$13.8	\$1.3	\$15.1
Total	\$34.6	\$6.3	\$40.8
2014			
Overnight	\$20.0	\$5.2	\$25.1
Day-Trip	\$13.5	\$1.1	\$14.6
Total	\$33.4	\$6.2	\$39.7
Percent Change			
Overnight	4.0%	-3.1%	2.6%
Day-Trip	2.4%	16.3%	3.4%
Total	3.4%	0.3%	2.9%

Total Traveler Spending by Trip Purpose, 2000 - 2015

- Leisure travelers were responsible for all but a small fraction of the increase in total traveler spending in 2015, with overnight leisure accounting for 70% of increase in dollars spent.
- The business segment showed a slight increase in 2014. The 16% increase in spending by the business day-trip segment offset the 3.1% drop by business overnight travelers.

PA Traveler Spending by Trip Purpose

(in billions of U.S. dollars)



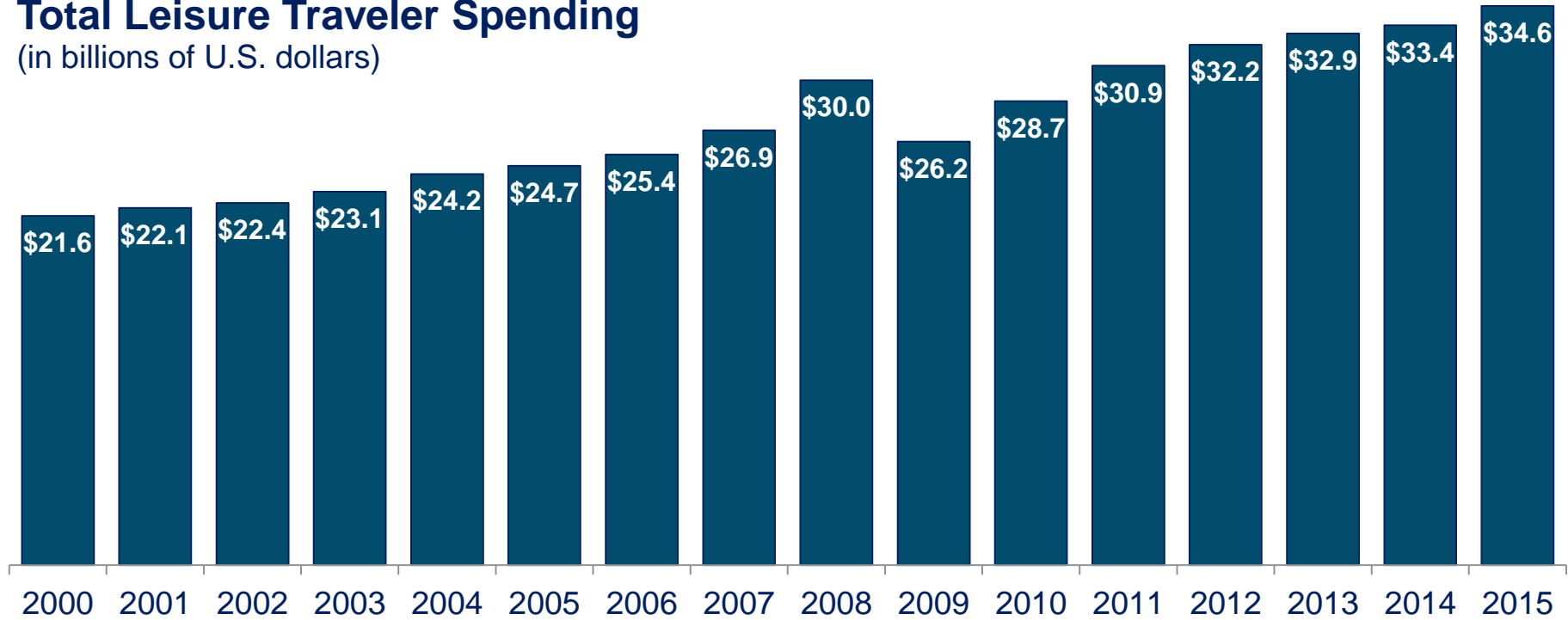
Source: Tourism Economics

Total Leisure Traveler Spending, 2000 - 2015

- Total leisure traveler spending grew by \$1.2 billion in 2015, or 3.4% -- double the rate of increase in the prior year and reaching a new record high of \$34.6 billion (in dollars not adjusted for inflation).
- While both overnight and day-trip leisure segments registered increases in 2015, the strongest increase in both dollar and percentage terms was by overnight travelers.

Total Leisure Traveler Spending

(in billions of U.S. dollars)



Source: *Tourism Economics*

Overnight Leisure Traveler Spending, 2000 - 2015

- Spending by Pennsylvania's overnight leisure travelers rose 4.0% in 2015 – the segment's strongest increase after three years of subdued growth.
- Total spending by the state's overnight leisure travelers reached a new record high in 2015 (in non-inflation-adjusted dollars).

Total Overnight Leisure Traveler Spending

(in billions of U.S. dollars)



Source: *Tourism Economics*

2015 Traveler Spending by Spending Category

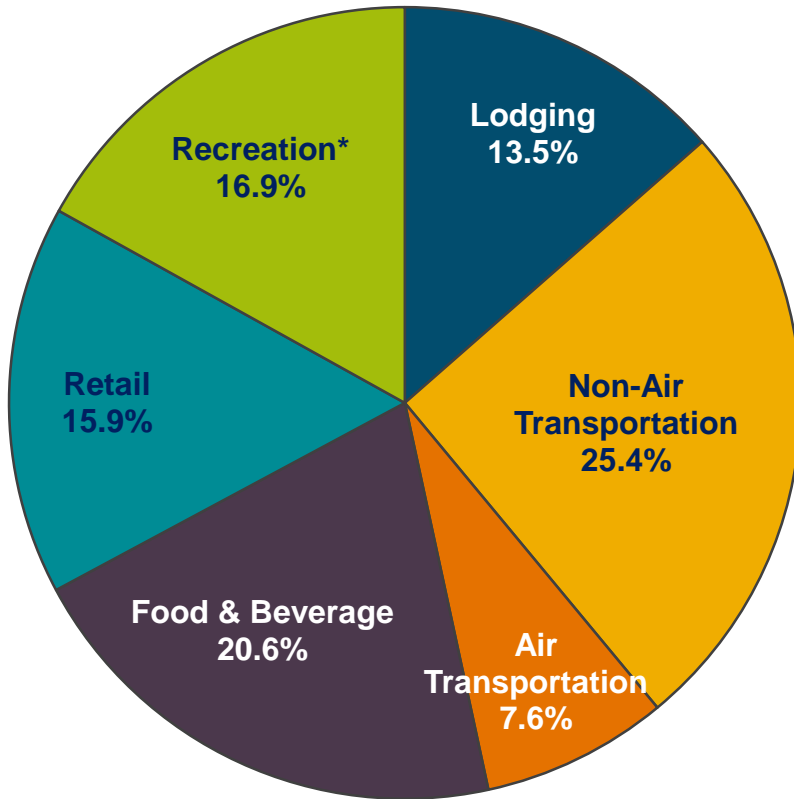
- Total visitor spending rose 2.9% in 2015 – the fastest pace since 2012. Growth in both the number of travelers and their spending levels contributed to the increase.
- As in 2014, the strongest increases in both dollar and percentage terms were in the food & beverage and lodging categories. The increased spending on in lodging was largely due to rate increases, while travelers appeared to splurge a bit more on their food and beverage purchases. Travelers increased their rate of spending on recreation in 2015, replacing retail in terms of the rate of increase.

Total Traveler Spending by Category
(in millions of U.S. dollars)

Sector	2008	2009	2010	2011	2012	2013	2014	2015	% Change
Non-Air Transportation	\$9,212	\$7,970	\$8,803	\$10,076	\$10,525	\$10,598	\$10,221	\$10,393	1.7%
Food & Beverage	\$7,442	\$6,602	\$7,084	\$7,400	\$7,529	\$7,822	\$8,093	\$8,393	3.7%
Recreation	\$5,637	\$4,971	\$5,666	\$6,133	\$6,365	\$6,570	\$6,702	\$6,915	3.2%
Retail	\$6,079	\$5,145	\$5,551	\$5,811	\$6,110	\$6,165	\$6,324	\$6,496	2.7%
Lodging	\$4,604	\$4,046	\$4,380	\$4,792	\$4,955	\$5,047	\$5,283	\$5,528	4.6%
Air Transportation	\$3,180	\$2,544	\$2,681	\$2,821	\$2,968	\$3,017	\$3,066	\$3,115	1.6%
TOTAL	\$36,154	\$31,278	\$34,165	\$37,034	\$38,453	\$39,224	\$39,688	\$40,839	2.9%
% Change	---	-13.5%	9.2%	8.4%	3.8%	2.0%	1.2%	2.9%	

2015 Traveler Spending by Spending Category

Distribution of total PA traveler spending



Includes spending by both domestic and international travelers.

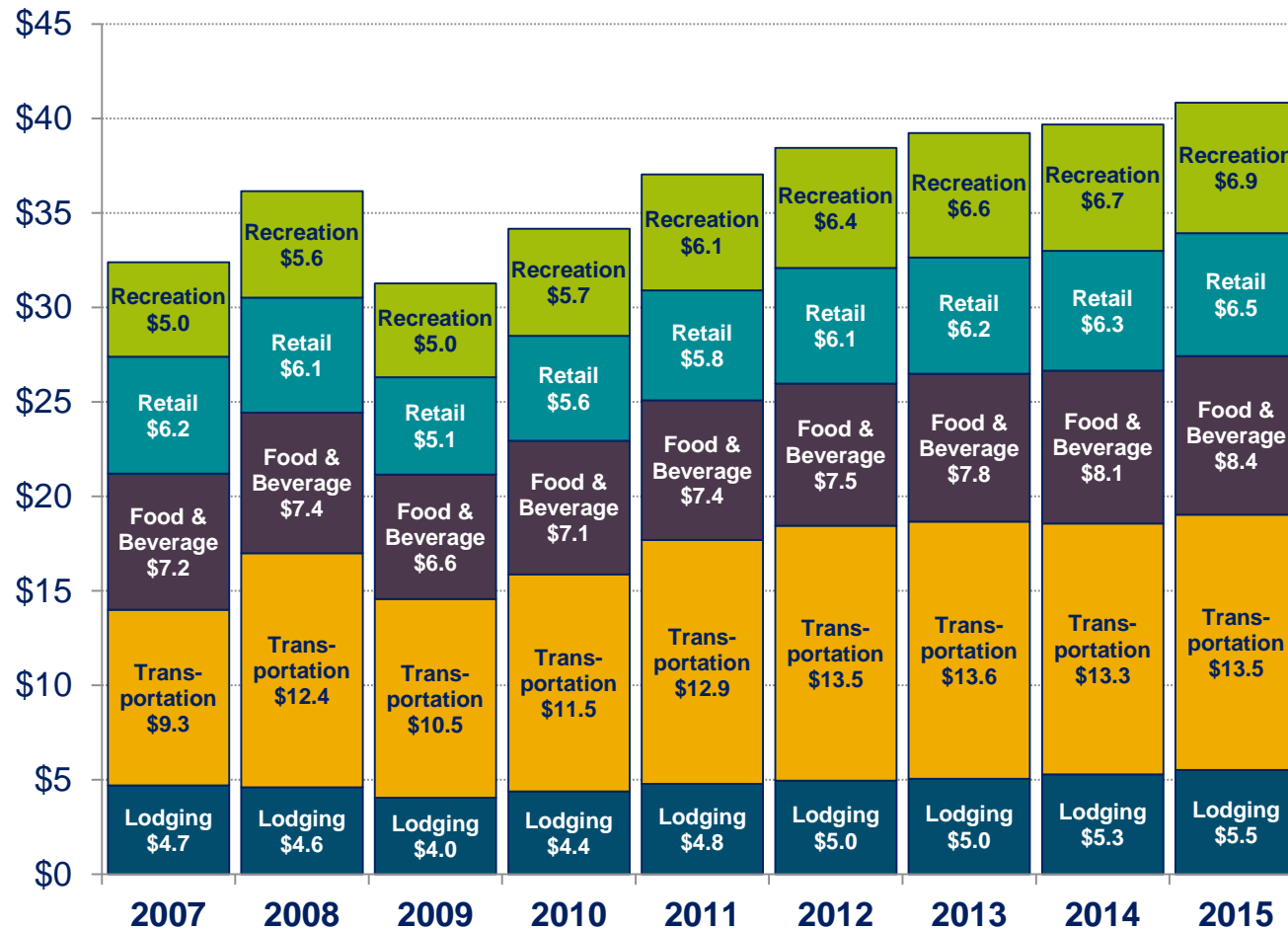
“Recreation” includes spending at attractions and on activities including both indoor (e.g., bowling) and outdoor (e.g., hiking).

Source: *Tourism Economics*

- As in 2014, there were a number of very small shifts in traveler spending in 2015. Travelers spent relatively more of their travel budgets on lodging and food and beverage purchases (both up 0.2 percentage points) as the cost of fuel was well below peak levels of prior years.
- Nevertheless, total spending on air and all other transportation combined accounted for a third (i.e., 33.1%) of traveler spending in 2012 -- down from 2012's peak of 35.1%, 34.7% in 2013, and 33.5% in 2014.
- As in 2014, lodging represented 13.5% of total traveler spending – remaining at the category's highest share since at least 2008 indicative of the strong rate increases the industry has enjoyed over the past several years.

PA Traveler Spending by Spending Category, 2007-2015

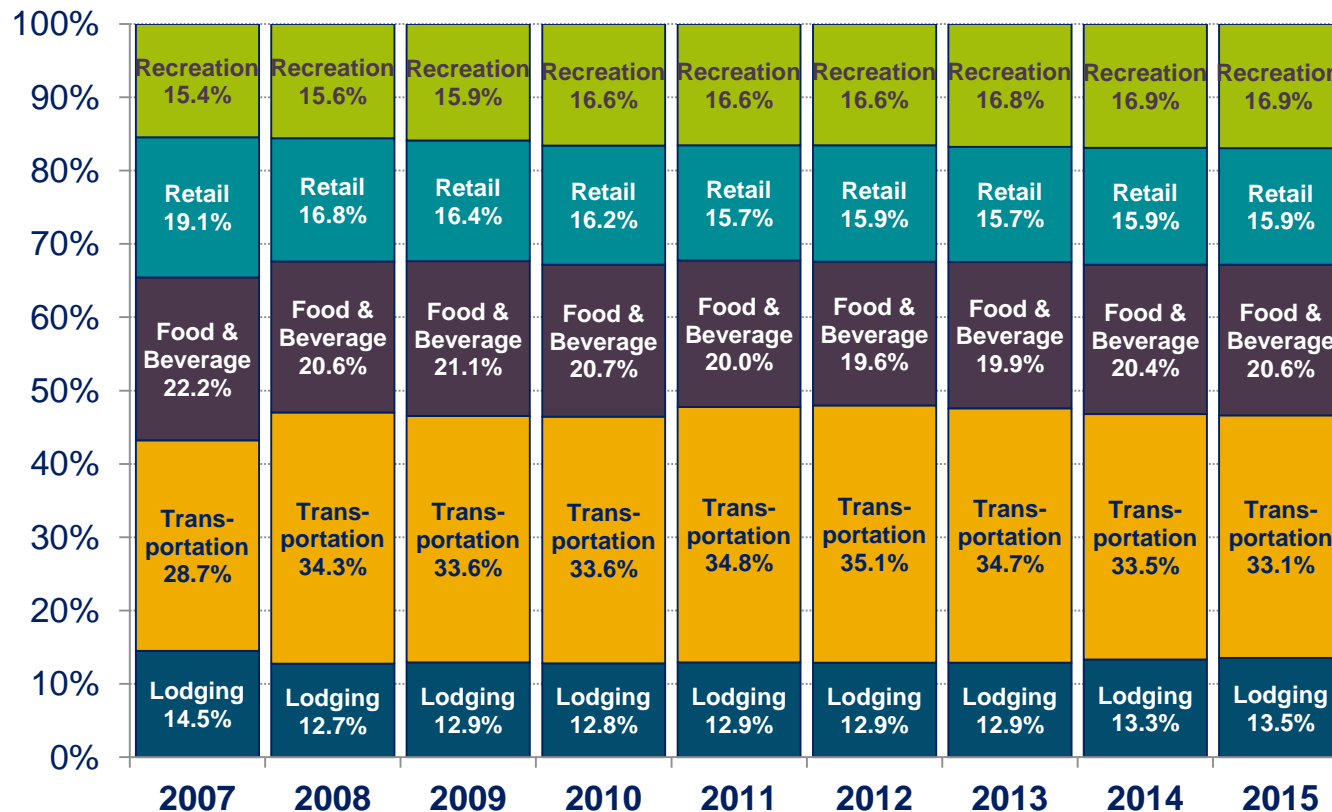
In billions of U.S. dollars



- Feeling more confident about their personal finances, travelers increased their spending in every travel category in 2015, but have been dedicating an increasing share of their travel budgets for recreation goods and services with the sector growing by close to \$2 billion, or almost 40%, between 2009 and 2015.
- As in 2014, except for transportation (all forms), traveler spending for all other travel spending categories reached new record highs in 2015 (*in nominal dollars*).

Source: *Tourism Economics, Longwoods International, National Travel & Tourism Office*

Share of Total Traveler Spending by Category, 2007-2015



Includes spending by both domestic and international travelers.

Source: Tourism Economics, Longwoods International, National Travel & Tourism Office

- While traveler spending on transportation declined in 2015 with the continued drop in gasoline prices, the sector still claimed an estimated one-third of traveler dollars.
- With the drop in the cost of transportation, travelers had more dollars available to spend on their other trip-related expenses, as reflected in the increase in the share of dollars going to meals and lodging.

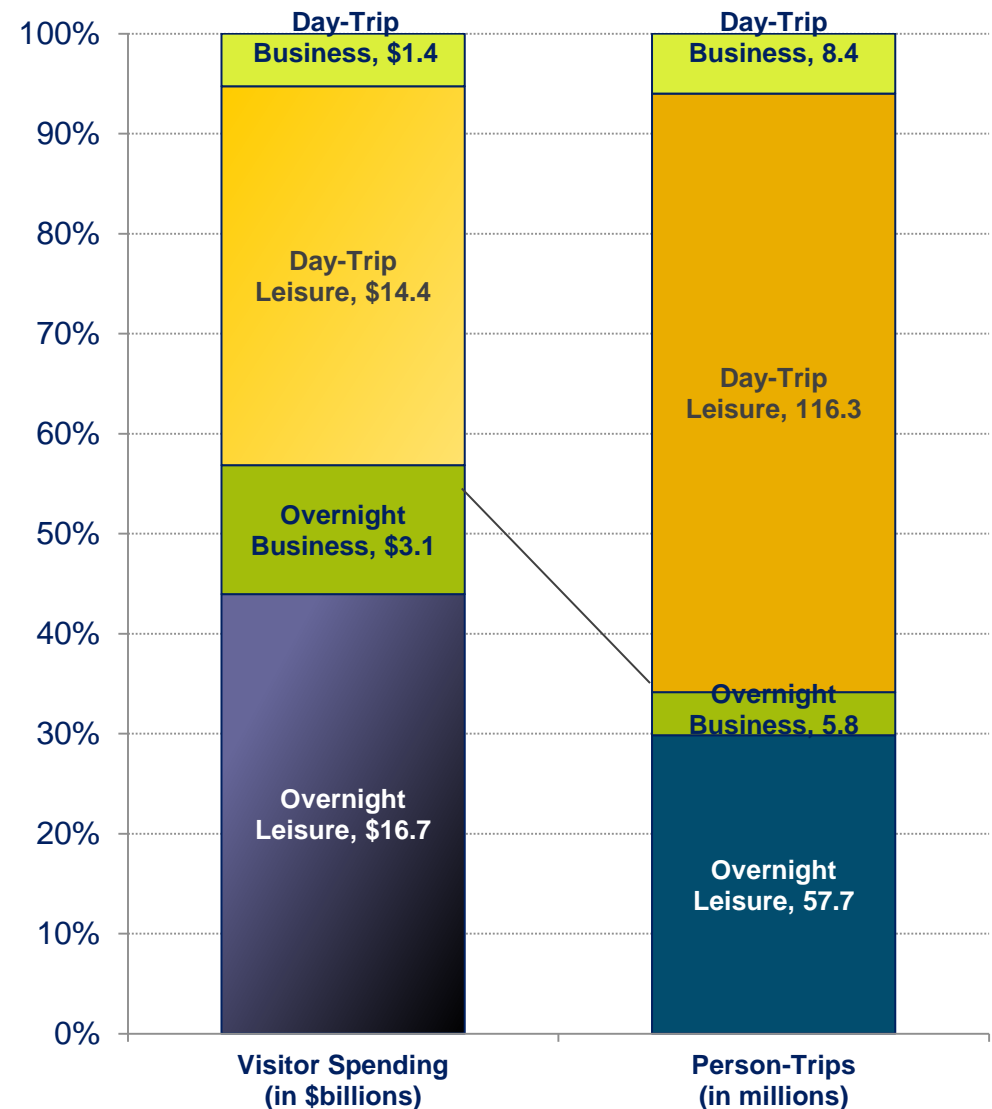
The Domestic Travel Market in Detail

Domestic Visits and Traveler Spending

- Pennsylvania hosted an estimated 193.3 million U.S. (*i.e., domestic*) travelers in 2015 (*as measured in “person-trips”*) – a 1.6% increase and well above the 0.3% rate of increase seen in the previous two years.
- Roughly a third of travelers (66.0 million) stayed overnight during their 2015 Pennsylvania trip – up 0.8%, while an estimated 127.4 million day-trips were taken to and/or within Pennsylvania – a 1.9% increase from 2014.
- U.S. travelers spent \$38.04 billion in PA in 2015 – a 2.9% increase. (*It is important to note this figure and the following charts do not include the costs incurred by out-of-state travelers getting to and from Pennsylvania, but are nonetheless attributable to PA (e.g., gasoline bought out-of-state by a person who then travels into and within PA and then home again, or the portion of an airline ticket attributable to just the part of the flight that occurs in PA. The following tables are based on traveler survey responses that do not apportion the amount of airline tickets or gas purchase attributable to each state.)*)
- The increase in Pennsylvania’s 2015 total domestic traveler spending was largely the result of increases in the number of travelers with spending by individual travelers per trip spending up 1.3% overall, or an increase of approximately \$5 per leisure traveler and a far larger \$57 for business travelers – by far the largest increase in years for business travel following several years of keeping the lid on travel costs.

2015 Domestic Traveler Spending vs. Person-Trips

- This chart compares the relative shares of spending and person-trips for the four major trip types, i.e., overnight leisure, day-trip leisure, overnight business, and day-trip business. *Note: “Business” excludes those whose trip was for combined business-leisure purposes since the data does not separate out the amount of trip costs attributable to the business portion vs. the leisure portion.*
- As in 2014, the Overnight Leisure segment accounted for 30% of all person-trips, but a far higher share (44%) of PA’s total domestic visitor spending in 2015, while the Day-Trip Leisure segment accounted for 60% of domestic person-trips but 38% of total spend.

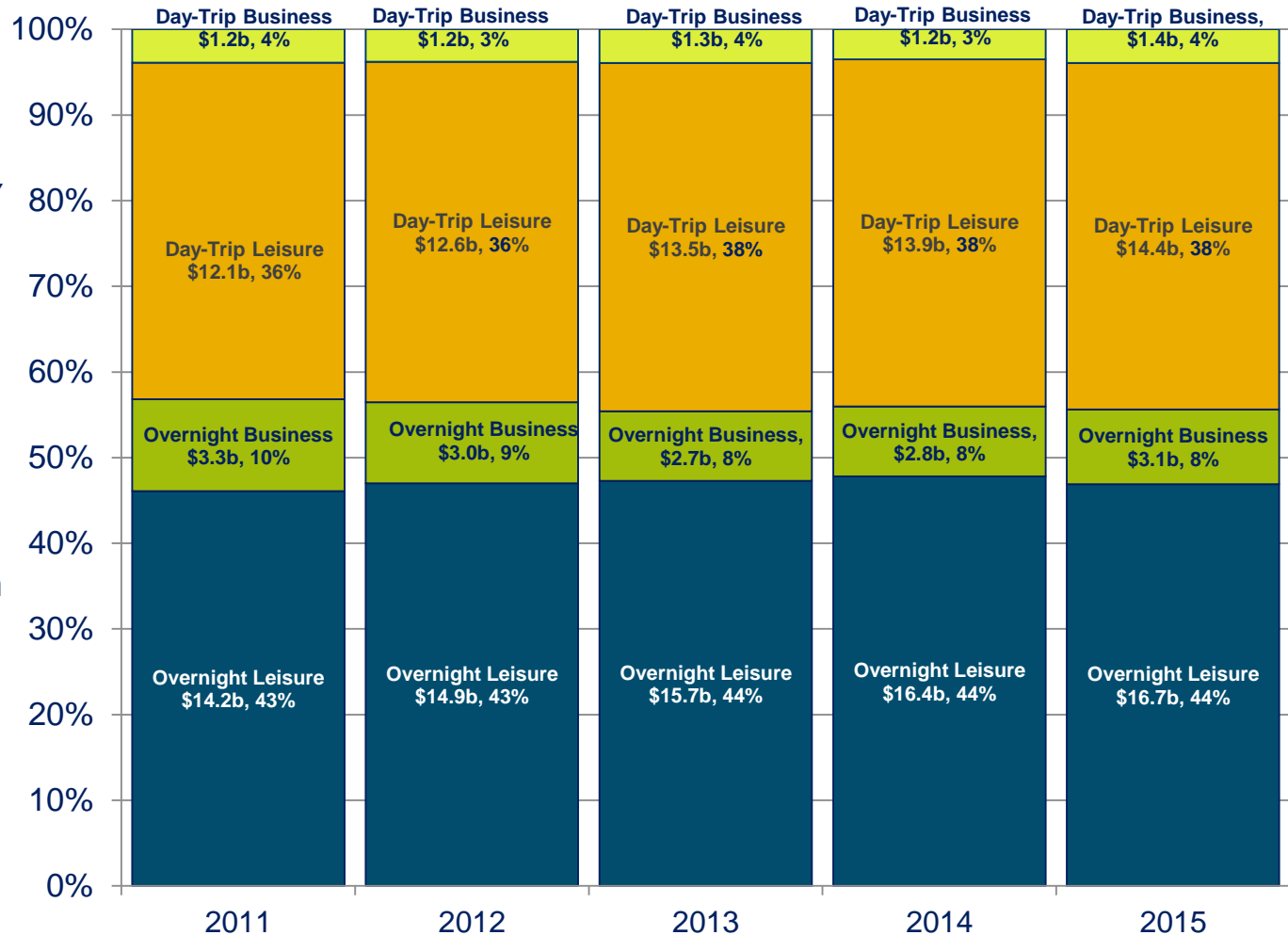


Domestic Spending Trends by Trip Type, 2011-2015

- *Note: Percentages based on domestic total, which includes those whose trip was for combined business-leisure although this category is not shown on the chart.*
- Leisure travelers accounted for over 80% of domestic traveler spending in 2015.
- The strong increase in per trip spending by the business segment drove the 1.1 percentage point increase in business's share of traveler spending to 12.6% in 2015.

Domestic traveler spending by trip type

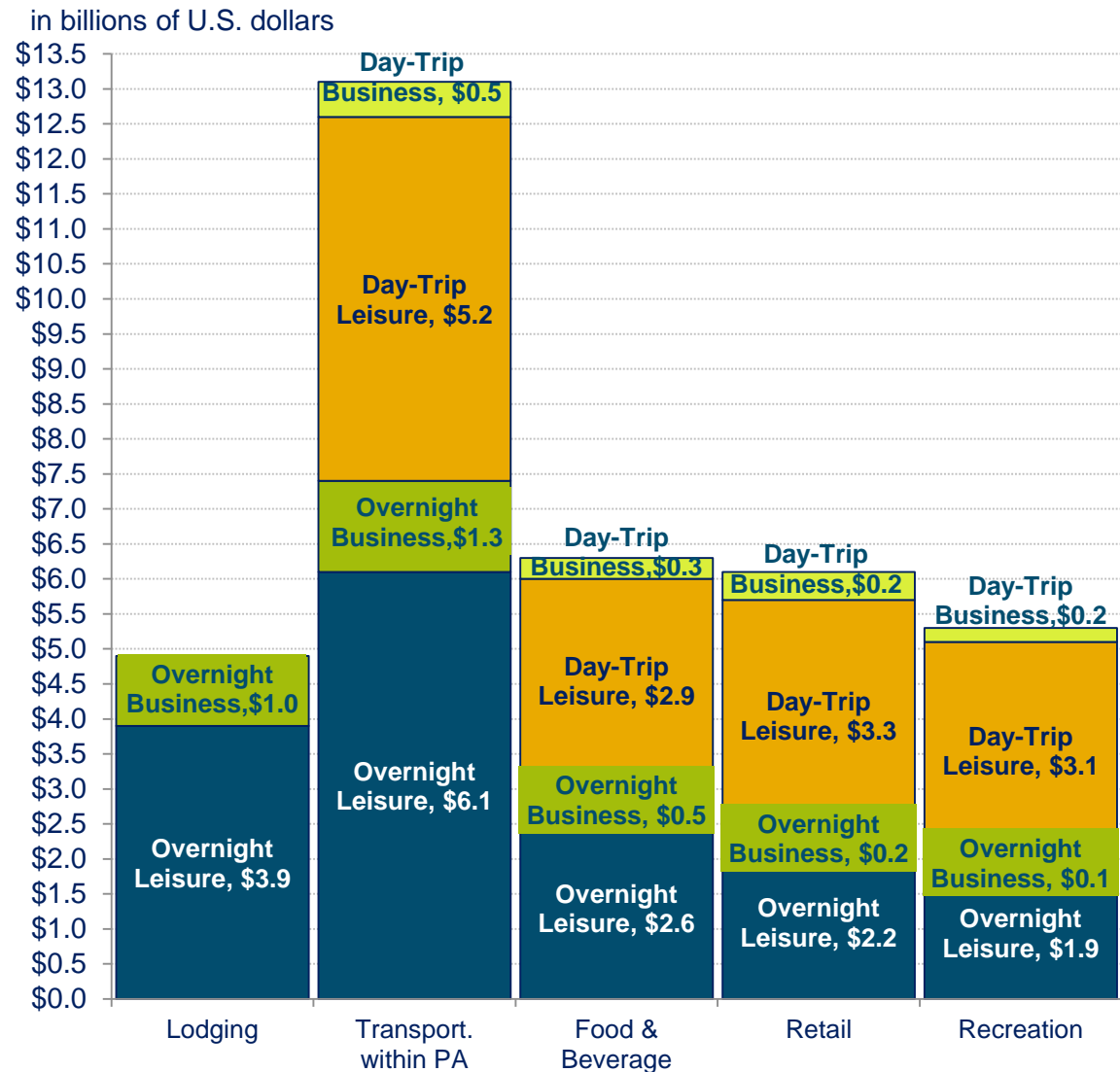
In billions of U.S. dollars and as Percent of total spending



Source: Longwoods International

2015 Domestic Traveler Spending by Category and Trip Type

- Leisure travelers accounted for 80% of PA's total 2014 domestic traveler spending on lodging.
- Business overnight's 20% share of lodging spending was more than double the segment's 9% share of PA's total overnight person-trips, with lodging accounting for just under a third of the segment's total spend in 2015.
- As in 2014, Day-Trip leisure visitors accounted for 58% of all domestic visitor spending on recreation in PA in 2015.

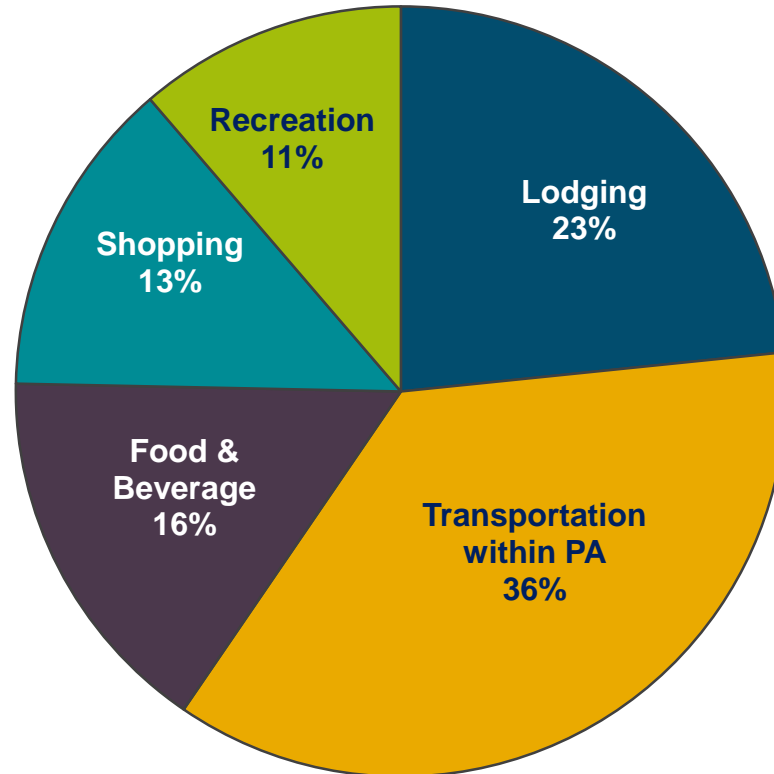


Source: Longwoods International

2015 Domestic Overnight Leisure Traveler Spending by Category

- Excluding business-leisure travelers, Pennsylvania hosted an estimated 58.0 million domestic overnight leisure travelers in 2015 (as measured in person-trips).
- These visitors spent an estimated \$16.7 billion in PA in 2015 – a \$0.3 billion increase from 2014.
- Each visitor spent an estimated \$290 per trip.
- As in 2014, lodging and transportation together accounted for close to 60% of the segment's total expenditures, or an estimated \$10 billion.

2015 Domestic Overnight Leisure Traveler Spending by Category

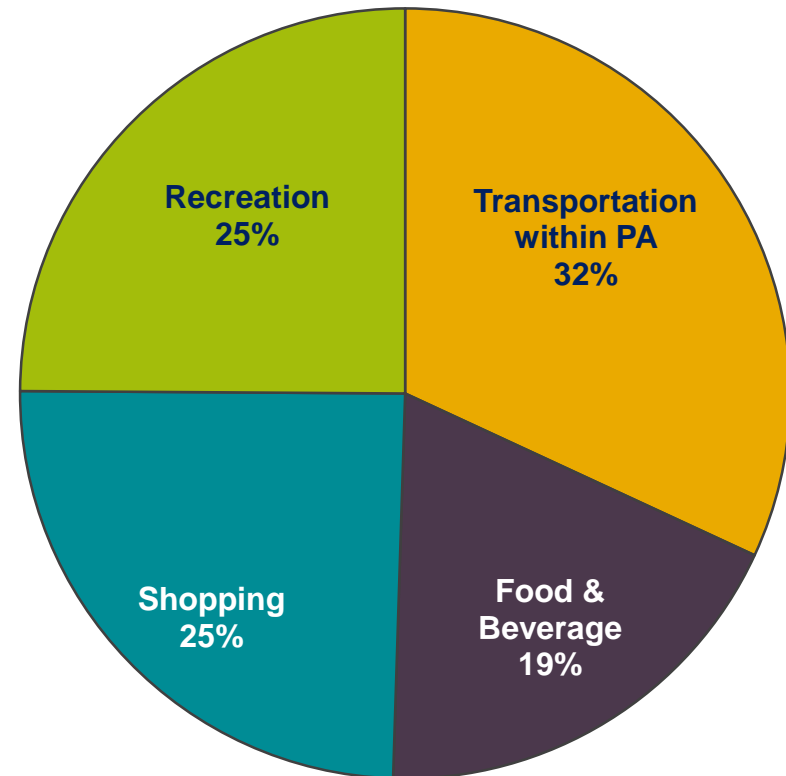


Source: Longwoods International

2015 Domestic Day-Trip Leisure Traveler Spending by Category

- Excluding business-leisure travelers, PA hosted an estimated 127.4 million day-trip leisure travelers (as measured in person-trips) in 2015.
- These visitors spent an estimated \$14.4 billion in Pennsylvania in 2015.
- Each visitor spent an average of \$128 per trip in 2015.
- Day-trip leisure travelers spent more than two-thirds of their trip dollars on recreation, shopping, and food and beverage purchases in 2015 as the drop in fuel prices freed up more dollars for other types of trip-related purchases.

2015 Domestic Day-Trip Leisure Traveler Spending by Category

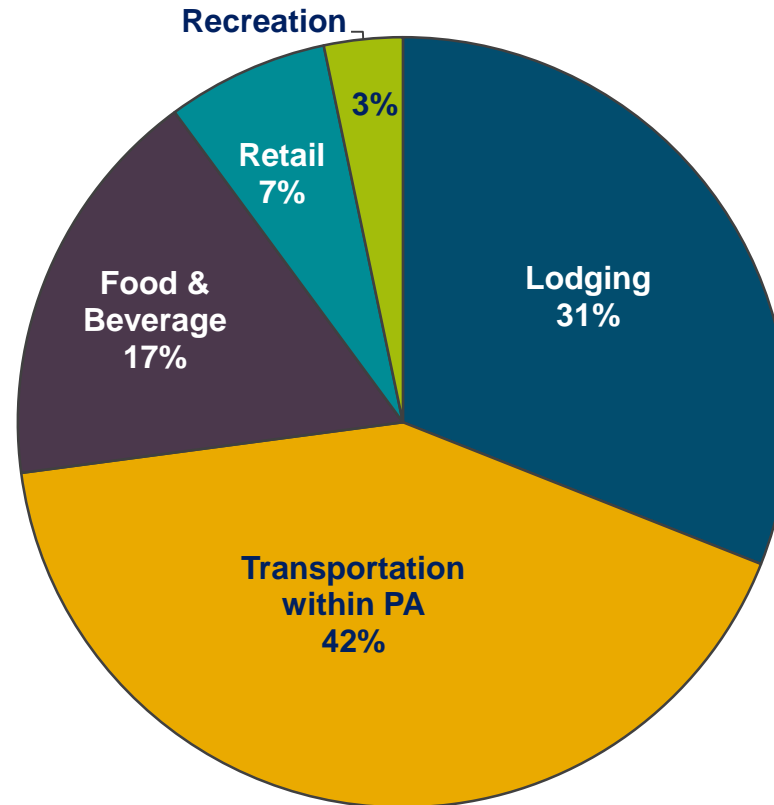


Source: Longwoods International

2015 Domestic Overnight Business Traveler Spending by Category

- PA hosted an estimated 5.8 million domestic overnight business travelers in 2015 (as measured in person-trips).
- These visitors spent an estimated \$3.1 billion in Pennsylvania in 2015.
- Each business traveler spent an average of \$535 per trip – the highest of any trip type. As in prior years, transportation and lodging together accounted for almost three-fourths of the segment's total trip expenditures.

2015 Domestic Overnight Business Traveler Spending by Category



Source: Longwoods International

Pennsylvania's Total Travel & Tourism Economy

Tourism Satellite Account Measures

Translating Sales (*Visitor Spending*) into *Impact*

Tourism Satellite Account & Total Tourism Demand, 2010-2015

The Tourism Satellite Account looks at a broader range of travel and tourism-related expenditures beyond visitor spending, including capital investments by the industry.

Total Spending by Category – Tourism Satellite Account (in billions of U.S. dollars)

Calendar Year	Domestic Visitor Spending	International Visitor Spending	Non-Visitor PCE*	Government Support ⁺	Capital Investment [#]	Total
2015	\$38.04	\$2.80	\$0.21	\$0.20	\$1.94	\$43.18
2014	\$36.97	\$2.72	\$0.24	\$0.18	\$1.92	\$42.03
2013	\$36.57	\$2.66	\$0.24	\$0.17	\$1.54	\$41.18
2012	\$35.82	\$2.64	\$0.24	\$0.16	\$1.57	\$40.43
2011	\$34.43	\$2.61	\$0.24	\$0.16	\$1.53	\$38.95
2010	\$31.59	\$2.58	\$0.24	\$0.16	\$1.35	\$35.91
% Change, 2014-2015	2.9%	2.9%	-12.5%	11.1%	1.0%	2.7%

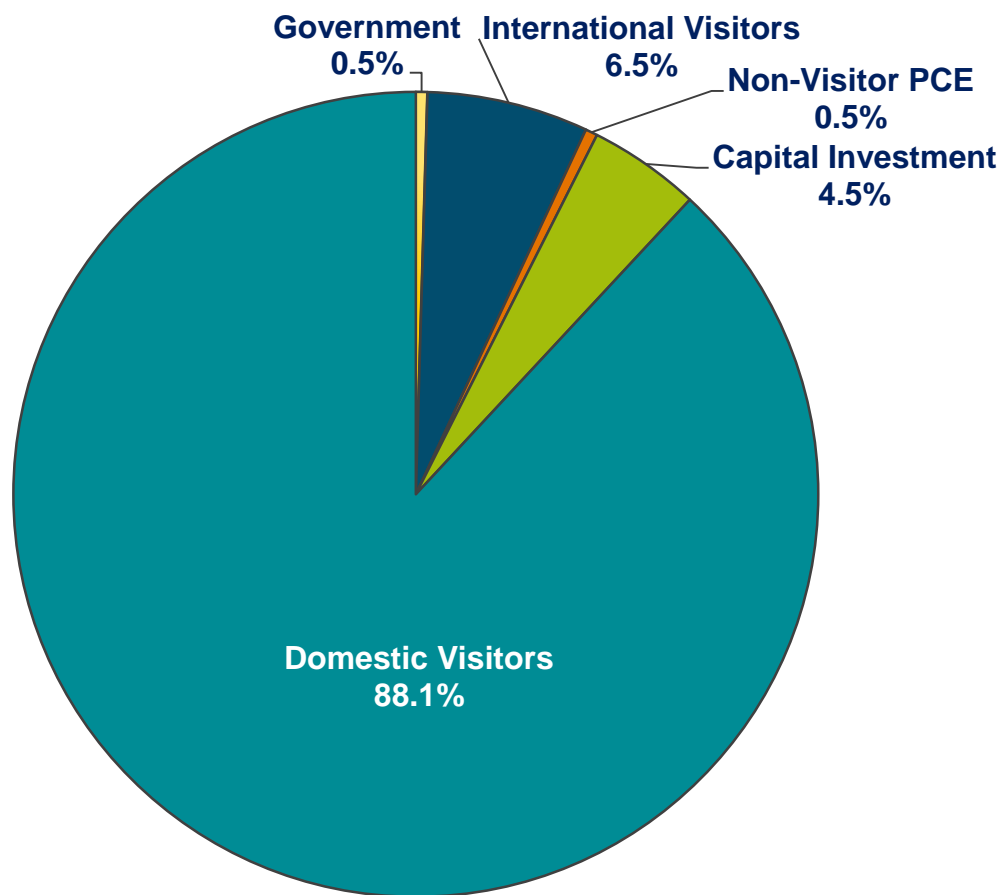
*Non-visitor private consumption expenditures (PCE) represent travel-related consumer durable purchases, such as an RV, boat, or furniture for a vacation home.

⁺Government support for travel and tourism includes the state Tourism Office budget and budgets of local tourism promotion agencies derived from the local room tax and other government support, and state-supported attractions (e.g., the State Museum), security, and other budget items in broad support of PA's travel and tourism industry.

[#]Capital investment includes construction of hotels and attractions, as well as investments in travel-related infrastructure and equipment.

2015 PA Travel and Tourism Demand by Source

2015 Travel and Tourism Demand by Source



- As in prior years, with a nearly 90% market share, domestic traveler spending continued to comprise the majority of all spending directly related to travel and tourism in Pennsylvania in 2015.
- International visitor spending accounted for 6.5% of PA's total travel-related sales – the same percentage as in 2014.
- Capital investment in travel-related construction and machinery & equipment was relatively unchanged at 4.5% of the total sales in the state's Travel Economy in 2015.

Travel & Tourism Industry Capital Investment in PA, 2008-2015

Travel- and Tourism-Related Capital Investment (in billions of U.S. dollars)

Capital Investments	2008	2009	2010	2011	2012	2013	2014	2015
Construction	\$1.282	\$0.619	\$0.556	\$0.654	\$0.663	\$0.613	\$0.983	\$0.975
Machinery & Equipment	\$0.808	\$0.727	\$0.796	\$0.872	\$0.910	\$0.928	\$0.940	\$0.965
Total	\$2.089	\$1.346	\$1.353	\$1.526	\$1.573	\$1.541	\$1.923	\$1.940
% Change		-35.6%	0.5%	12.8%	3.1%	-2.1%	24.8%	0.9%

- The travel and tourism industry invested close to \$2 billion in capital-intensive construction and machinery and equipment projects in Pennsylvania in 2015 – a nearly 0.9% increase compared to the previous year. It is important to note that the amount for construction in 2014 was revised upward by nearly \$100 million from the amount reported in the 2014 Economic Impact of Travel Report as more complete data became available.
- Investments in machinery and equipment were at the highest level since at least 2008, with the 2.7% increase from 2014 offsetting the slight 0.8% decline from construction. Investments in construction have yet to reach 2008's record level.

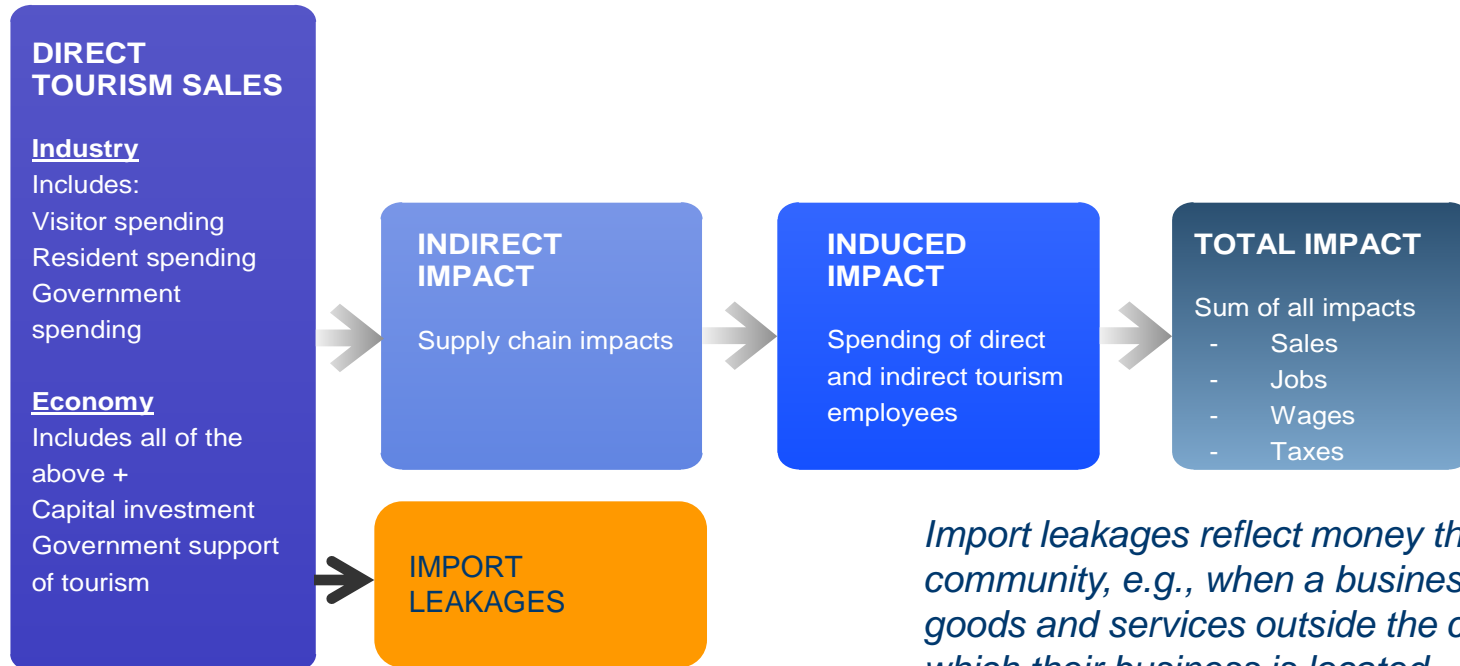
2015 Sales to Travelers in PA and Total Economy Impact

- The primary and direct impact of travel and tourism is driven by sales made to travelers. Measuring sales allows for apples-to-apples comparisons with other industries.
- The total economy/ economic impact of the travel and tourism industry includes capital investment in travel-related facilities and businesses in support of travel and tourism, non-visitor private consumption expenditures (PCE), and government spending, in addition to traveler spending.

2015 PA Traveler Spending vs. Total Impact By Expenditure Category (in millions of U.S. dollars)		
Industry	Total Traveler Spending	Total Economy Impact
Non-Air Transportation	\$10,392.6	\$10,392.6
Food and Beverage	\$8,392.9	\$8,392.9
Recreation	\$6,915.4	\$6,915.4
Shopping	\$6,495.7	\$6,495.7
Lodging	\$5,527.6	\$5,527.6
Air Transportation	\$3,115.2	\$3,115.2
Capital Investment	\$0	\$1,940.4
Non-Visitor Personal Consumption Exp.	\$0	\$ 207.2
Government	\$0	\$ 195.1
Total	\$40,839.5	\$43,182.2

Translating Sales into Impact

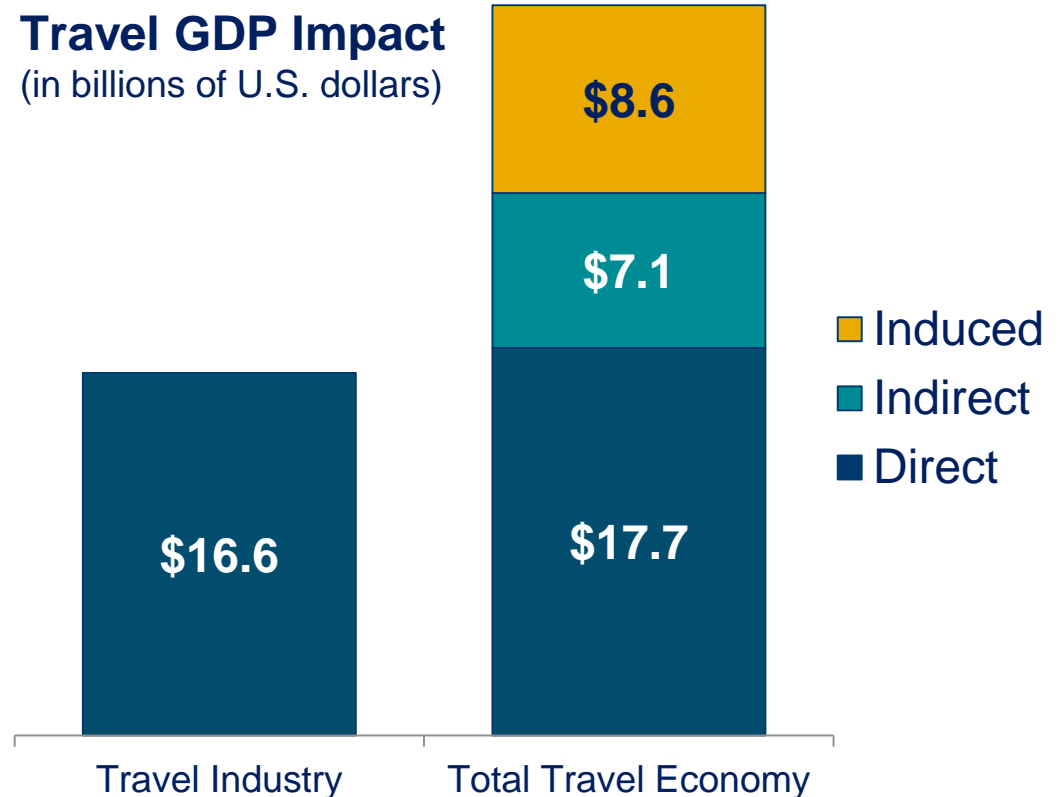
- Direct tourism sales flow through the PA economy, generating GDP, jobs, wages, and taxes.
- The indirect impacts measure supply chain (b2b) activity generated by travel and tourism sales.
- The induced impacts measure the effects of PA worker income generated by travel and tourism-related sales and that is spent within the state.



Import leakages reflect money that leaves the community, e.g., when a business purchases goods and services outside the community in which their business is located.

Impact of Travel and Tourism on PA's GDP in 2015

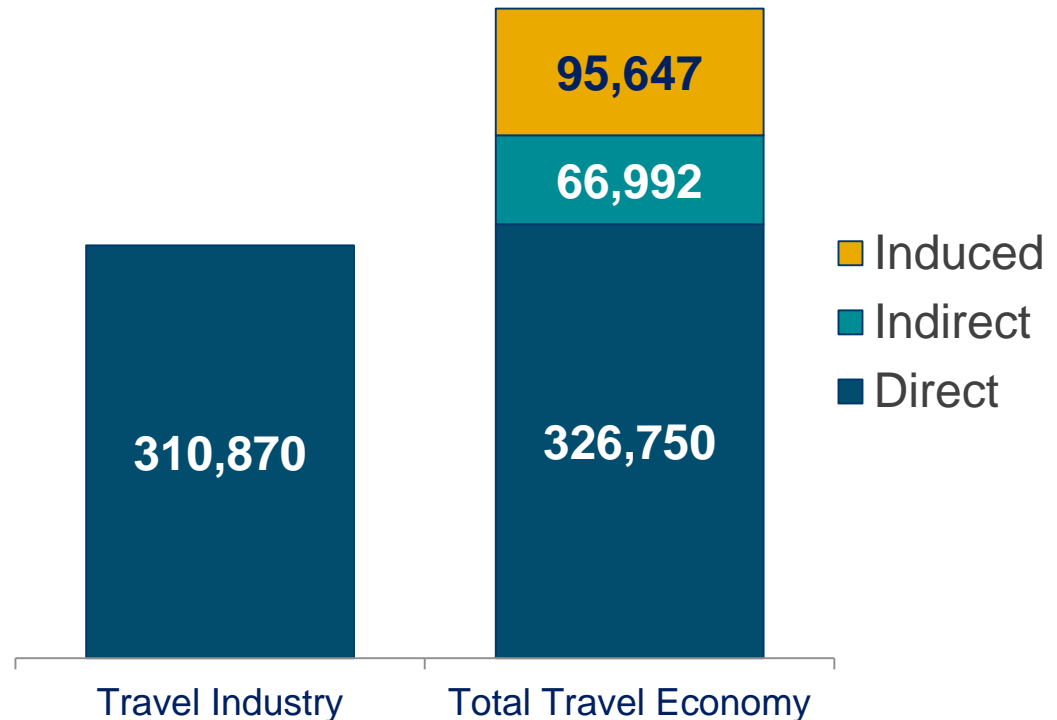
- Pennsylvania's travel and tourism industry directly contributed close to \$17 billion to the state's gross domestic product (GDP) in 2015.
- The state's total travel and tourism economy (*including direct, indirect, and induced impacts*) generated well over \$33 billion to PA's GDP in 2015 – a figure equivalent to an estimated 4.6% of the state's economy.



Impact of Travel and Tourism on PA Jobs in 2015

- Traveler spending directly supported 310,870 jobs in Pennsylvania in 2015 (*i.e., the travel and tourism industry impact*).
- The travel and tourism economy (*i.e., includes direct, indirect, and induced impacts*) supported 489,390 jobs in PA in 2015 or, as in the previous three years, 6.5% of all jobs in the state.

Impact of Travel on PA's Job Count in 2015



State Tourism Industry Impacts

(Direct Impacts)



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Travel and Tourism Industry Impact on PA GDP and Jobs, 2015

2015 PA Travel and Tourism Spending Impacts (in millions of U.S. dollars)		
Industry	GDP (in millions)	Employment
Agriculture, Fishing, Mining	--	--
Construction and Utilities	--	--
Manufacturing	--	--
Wholesale Trade	--	--
Air Transportation	\$1,311	9,754
Non-Air Transportation	\$2,077	26,883
Retail Trade	\$1,494	32,117
Gasoline Stations	\$564	8,326
Communications	--	--
Fire, Insurance, and Real Estate (FIRE)	\$1,110	4,322
Business Services	--	--
Education and Health Care	--	--
Recreation and Entertainment	\$2,471	44,780
Lodging	\$3,354	57,036
Food & Beverage	\$3,844	119,960
Personal Services	\$377	7,692
Government	--	--
Total	\$16,601	310,870
Percent Change	4.7%	1.5%

- Travel and tourism industry impacts include only the direct value of the goods and services purchased by travelers and, as such, exclude capital investment and general government support of travel and tourism. This definition is consistent with the national economic accounts.
- On this basis, PA's travel and tourism industry was responsible for \$16.6 billion of the state's gross domestic product (GDP) in 2015 – a 4.7% increase from 2014 and representing 2.3% of the state total.
- Spending by travelers within PA directly supported 310,870 PA jobs – a 1.5% increase from 2014 and continuing to represent 4.1% of total employment in the state.

Why Spending and GDP Differ

- Traveler spending in Pennsylvania totaled \$40.8 billion in 2015, yet the industry's contribution to the state's Gross Domestic Product was equal to just \$16.6 billion. Why are the figures so different?
- GDP (gross domestic product) is less than traveler spending, or “sales,” because GDP measures only the locally produced value of goods and services consumed by travelers.
 - This includes the local labor, capital depreciation, and the profits of travel-related companies that are based in Pennsylvania.
 - The costs of imported goods (e.g., gasoline, food, retail goods, etc.) that come from out-of-state are excluded from the GDP calculation.
 - In addition, business profits from out-of-state companies are also excluded. For example, Wal-Mart profits leave the state and would not be included in PA's GDP.

Because of these reasons, traveler spending (i.e., “sales” made to travelers) will always be substantially higher than GDP.

PA's Travel-Related Employment, 2006-2015

PA Employment Supported By Travel and Tourism										
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Employment	279,983	288,383	291,774	278,223	286,474	291,479	298,193	304,155	306,290	310,870
% Change		3.0%	1.2%	-4.6%	3.0%	1.7%	2.3%	2.0%	0.7%	1.5%

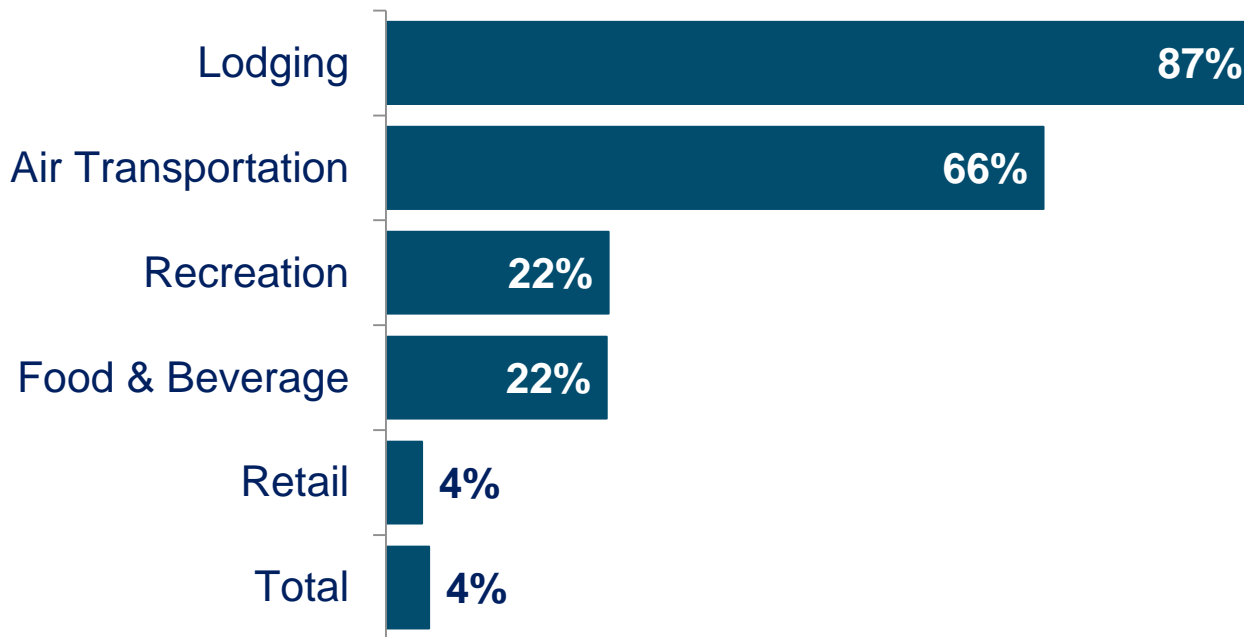
- The number of PA jobs directly supported by travel and tourism reached a new record high of close to 310,900 jobs in 2015.
- The 1.5% increase in the state's travel-supported employment number was nearly double the 0.8% rate of growth in overall state employment in 2015.



PA Travel-Related Employment Intensity by Industry, 2015

- Pennsylvania's travel and tourism industry continues to represent a significant portion of employment in the state's lodging, air transportation, food & beverage, and recreation sectors, and an estimated 4.3% of the state total.
- These proportions have remained relatively constant over the past several years.

Travel and Tourism-Related Employment Intensity by Industry



Ranking PA's Travel-Generated Employment, 2015

- Travel and tourism continued to rank as PA's 10th largest employer in 2015, directly supporting 310,870 jobs in the state's economy. (*Note: Travel and tourism does not have an official NAICS "industry code," but is responsible for a portion of jobs reported for industries with specified codes (e.g., accommodation, food & beverage, retail trade, transportation, etc.).*)

Employment Ranking – Private Sector Commonwealth of Pennsylvania, 2015

Ranking	Industry	Employment
1	Health care and social assistance	1,055,562
2	Retail Trade	779,408
3	Manufacturing	598,615
4	Professional, scientific, and technical services	502,039
5	Accommodation and food services	490,825
6	Other services, except public administration	425,217
7	Administrative and waste management services	400,645
8	Finance and insurance	389,694
9	Construction	377,530
10	Real estate and rental and leasing	297,271
11	Educational services	297,124
12	Transportation and warehousing	294,003
13	Wholesale trade	256,129
14	Arts, entertainment, and recreation	165,632
15	Management of companies and enterprises	139,547

**PA Jobs Directly
Supported by Travel:
310,870**

Source: U.S. Bureau of Economic Analysis, "SA25N Total Full-Time and Part-Time Employment by NAICS Industry,"

State Travel and Tourism Economy Impacts

(Direct, Indirect, and Induced Impacts)



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PA Travel Economy – GDP Impact by Industry, 2015

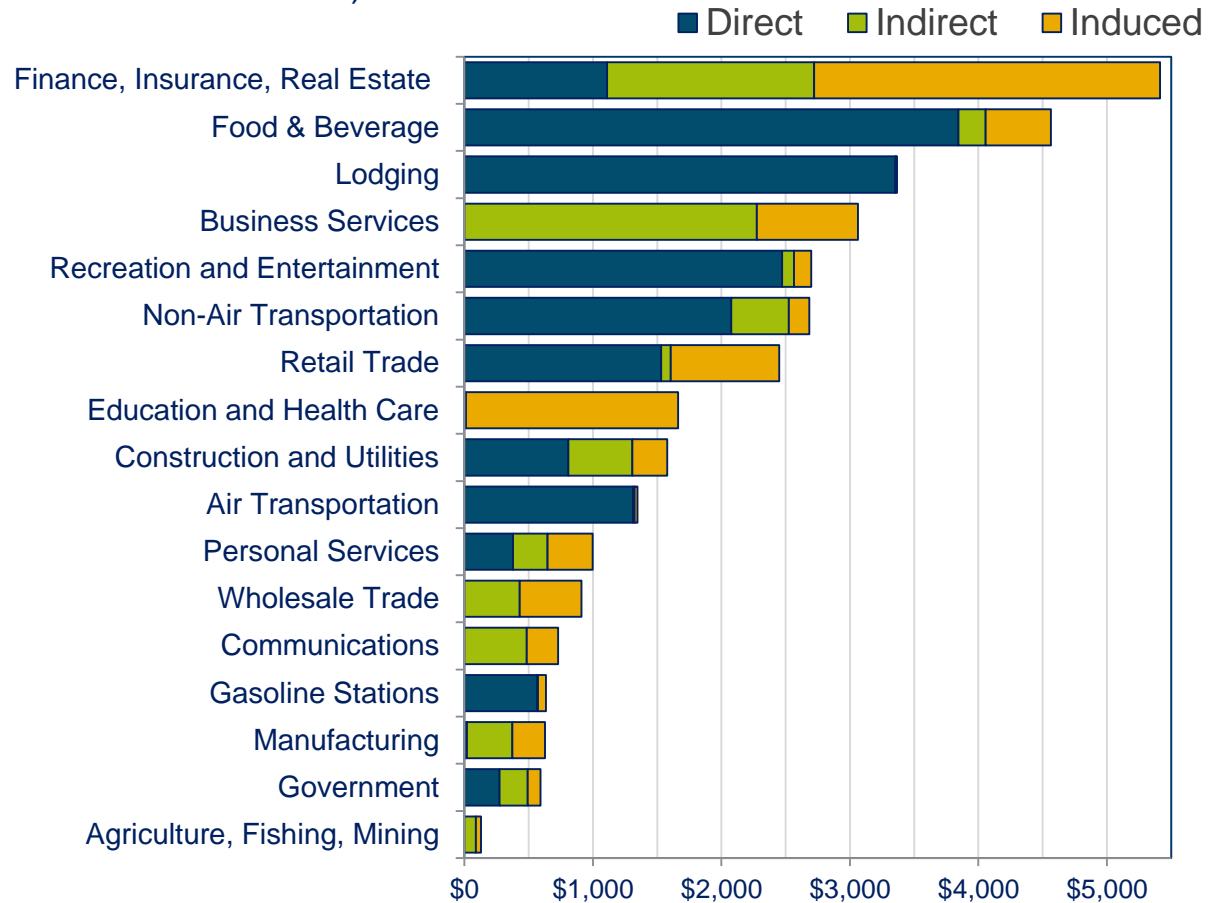
- The following table shows the direct, indirect, and induced impact of travel and tourism on Pennsylvania's GDP for various industry sectors.
- Under the broader economy impact measure, the state's travel and tourism industry generated more than \$33 billion in Gross Domestic Product (GDP) for PA in 2015 – up 4.5% from 2014.

2015 PA Travel Economy GDP (<i>Value Added</i>) (in millions of U.S. dollars)				
Industry	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	\$ --	\$89	\$39	\$127
Construction and Utilities	808	499	270	1,576
Manufacturing	20	354	253	627
Wholesale Trade	--	430	480	910
Air Transportation	1,311	13	22	1,346
Non-Air Transportation	2,077	448	159	2,684
Retail Trade	1,531	75	844	2,451
Gasoline Stations	564	7	63	634
Communications	--	486	243	729
Finance, Insurance, Real Estate (FIRE)	1,110	1,612	2,692	5,414
Business Services	--	2,276	786	3,062
Education and Health Care	--	12	1,651	1,663
Recreation and Entertainment	2,471	93	136	2,700
Lodging	3,354	6	7	3,368
Food & Beverage	3,844	211	509	4,564
Personal Services	377	270	351	998
Government	274	219	100	593
Total	\$17,741	\$7,098	\$8,604	33,443
Percent Change from 2014	4.8%	4.6%	4.1%	4.5%

PA Travel Economy – GDP Impact by Industry, 2015

- Including the indirect and induced supply chain and income effects, travel and tourism benefits a broad spectrum of industries.
- The recreation and entertainment sector was responsible for \$2.7 billion of PA's GDP in 2015, with 92% directly derived from visitor spending – behind only lodging and air transportation in terms of the percentage of direct impact.

2015 Travel Economy GDP Impact by Industry
(in millions of U.S. dollars)



PA Travel Economy – Employment Impact by Industry, 2015

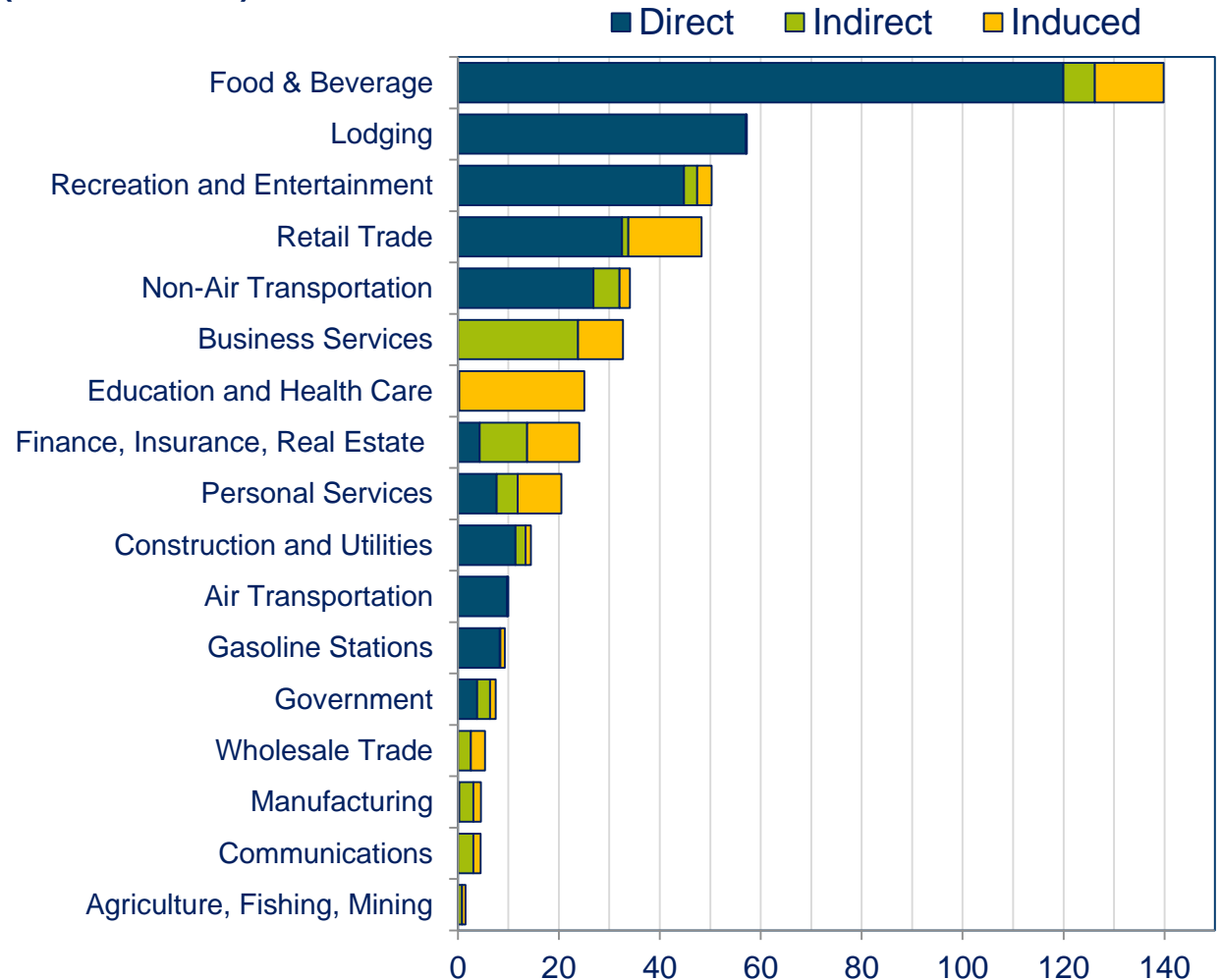
- Pennsylvania's travel and tourism industry supported nearly 490,000 jobs in total, or 6.5% of PA's total employment in 2015, a proportion that has remained relatively constant since 2012.
- The total presented below reflects the broadest measurement of employment, i.e., includes businesses directly serving the traveling public and their support industries, as well as jobs supported by government spending, capital investment, and private consumption expenditures.

2015 PA Travel-Related Employment (<i>Value Added</i>)				
Industry	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	--	821	659	1,480
Construction and Utilities	11,434	1,952	1,092	14,479
Manufacturing	252	2,822	1,466	4,540
Wholesale Trade	--	2,539	2,835	5,373
Air Transportation	9,754	93	158	10,005
Non-Air Transportation	26,883	5,125	2,104	34,112
Retail Trade	32,523	1,253	14,522	48,298
Gasoline Stations	8,326	96	864	9,286
Communications	--	3,089	1,435	4,524
Finance, Insurance, Real Estate (FIRE)	4,322	9,414	10,346	24,082
Business Services	--	23,784	8,919	32,704
Education and Health Care	--	245	24,832	25,077
Recreation and Entertainment	44,780	2,634	2,888	50,302
Lodging	57,036	104	124	57,265
Food & Beverage	119,960	6,248	13,637	139,845
Personal Services	7,692	4,187	8,635	20,514
Government	3,788	2,585	1,130	7,503
Total	326,750	66,992	95,647	489,389
Percent Change from 2013	1.5%	1.2%	1.3%	1.4%

PA Travel Economy – Employment Impact by Industry, 2015

- As in prior years, the restaurant, lodging, and recreation sectors employed the most individuals in jobs supported by travel and tourism – both those who directly interact with the traveling public and those with a less direct relationship (e.g., suppliers, manufacturers, and those whose jobs are derived from the income spent by persons directly or indirectly supported by the travel and tourism industry).
- The secondary benefits are realized across the state's entire economy through the supply chain and as business owner and employee incomes are spent.

2015 Total Travel Employment Impact by Industry
(in thousands)



PA Travel Economy – Labor Income Impact by Industry, 2015

Traveler spending generated more than \$20 billion in income for persons employed by PA businesses supported in some way – either directly or indirectly – by travel and tourism in 2015.

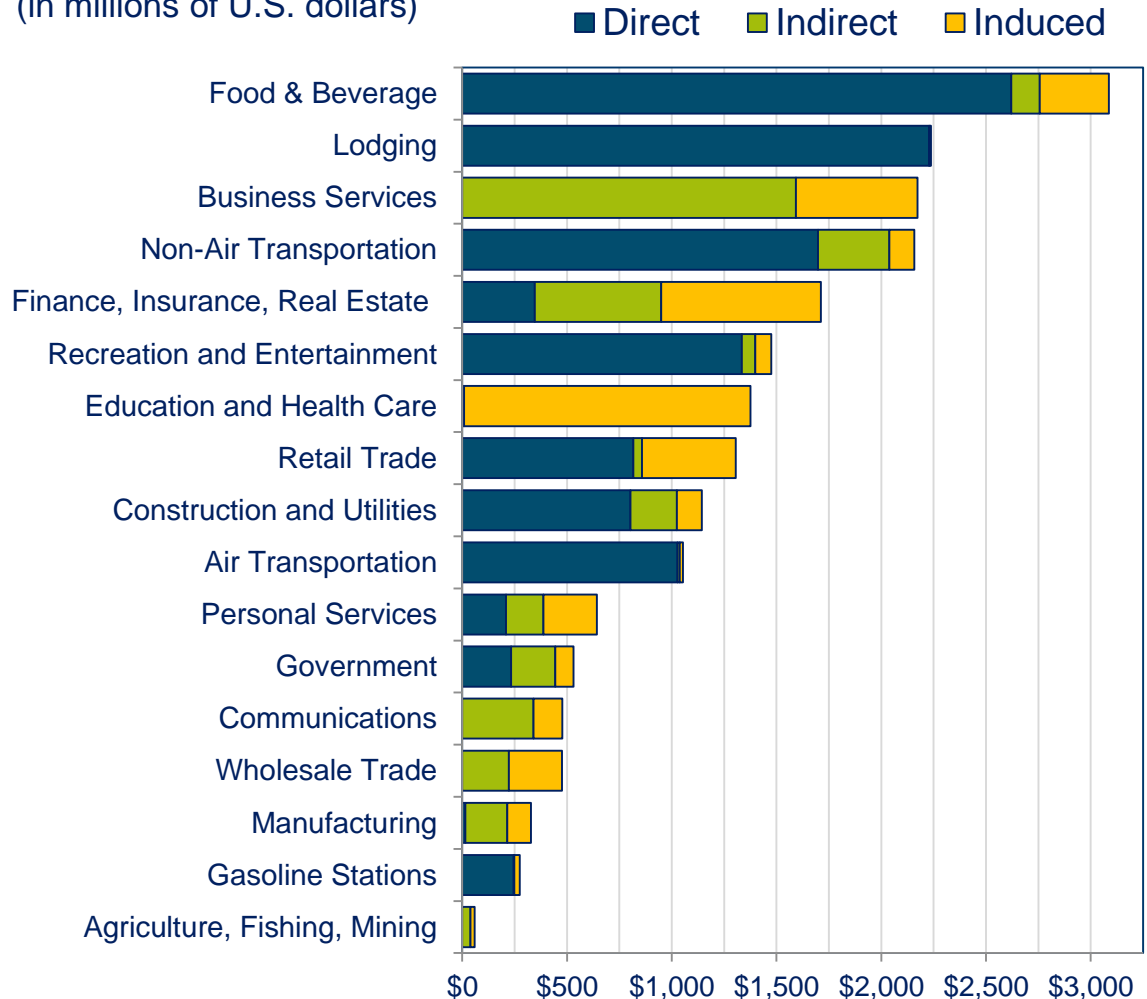
2015 PA Travel-Related Labor Income (Compensation) (in millions of U.S. dollars)				
Industry	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	\$ --	\$39.1	\$20.0	\$59.1
Construction and Utilities	803.5	221.3	119.2	1,144.1
Manufacturing	15.3	199.8	113.3	328.4
Wholesale Trade	--	222.4	254.0	476.3
Air Transportation	1,028.1	9.4	16.1	1,053.5
Non-Air Transportation	1,698.2	339.9	119.7	2,157.7
Retail Trade	817.3	40.8	448.1	1,306.2
Gasoline Stations	245.7	2.9	26.4	275.0
Communications	--	340.6	136.2	476.8
Finance, Insurance, Real Estate (FIRE)	345.4	603.8	762.4	1,711.7
Business Services	--	1,593.4	580.4	2,173.8
Education and Health Care	--	9.0	1,366.7	1,375.7
Recreation and Entertainment	1,333.9	64.4	77.1	1,475.4
Lodging	2,228.7	3.5	4.4	2,236.6
Food & Beverage	2,620.1	137.3	329.4	3,086.8
Personal Services	208.7	178.0	255.3	642.0
Government	233.0	210.5	86.8	530.3
Total	\$11,577.9	\$4,216.1	\$4,715.4	\$20,509.4
Percent Change from 2013	5.2%	4.8%	4.5%	4.9%

PA Travel Economy – Labor Income Impact by Industry, 2015

- Traveler spending generated well over \$20 billion for the state's business owners and their employees, with the direct impact led by traveler intensive industries, i.e., restaurants, lodging, and transportation.
- Business owners and employees of business services and finance, insurance & real estate companies continued to derive substantial benefit from the state's travel and tourism industry, primarily as service suppliers to the industry.

2015 Total Labor Income Impact by Industry

(in millions of U.S. dollars)



PA Travel Economy – Tax Generation, 2009-2015

- Travelers were responsible for close to \$4.4 billion in Pennsylvania state and local tax revenues and an additional \$4.5 billion in federal taxes in 2015.
- Pennsylvania's state and local governments would have to tax each PA household an additional \$880 per year to replace the taxes generated by travel and tourism.

Traveler-Generated Taxes, 2009 - 2015 (in millions of U.S. dollars)

Tax Type	2009	2010	2011	2012	2013	2014	2015	% Change
Federal Taxes	\$3,505.1	\$3,681.6	\$3,856.4	\$4,007.8	\$4,163.9	\$4,312.3	\$4,499.5	4.3%
Corporate	349.2	369.5	387.1	405.3	411.8	418.2	431.4	3.2%
Indirect Business	332.3	351.6	368.3	385.7	391.8	397.9	410.5	3.2%
Personal Income	1,035.3	1,085.5	1,137.0	1,179.5	1,232.1	1,281.92	1,341.1	4.6%
Social Security	1,788.3	1,875.0	1,964.0	2,037.3	2,128.2	2,214.3	2,316.5	4.6%
State and Local Taxes	\$3,378.5	\$3,572.6	\$3,799.2	\$4,023.6	\$4,132.6	\$4,223.8	\$4,366.2	3.4%
Corporate	214.7	235.9	250.5	265.9	270.2	274.4	283.0	3.2%
Personal Income	325.1	340.8	357.0	370.3	386.9	402.5	421.1	4.6%
Sales	1,199.7	1,316.7	1,441.5	1,507.6	1,533.6	1,553.4	1,595.7	2.7%
Hotel Occupancy	112.2	121.7	133.1	143.6	152.9	160.0	170.4	6.5%
Property	1,030.2	1,032.3	1,066.9	1,155.6	1,195.5	1,227.1	1,259.5	2.6%
Excise and Fees	468.3	495.6	519.1	548.3	559.9	571.4	599.9	5.0%
PA Unemployment	28.3	29.6	31.1	32.2	33.7	35.0	36.6	4.6%
TOTAL	\$6,883.5	\$7,254.3	\$7,655.7	\$8,031.4	\$8,296.5	\$8,536.1	\$8,865.8	3.9%

Pennsylvania's Tourism Regions

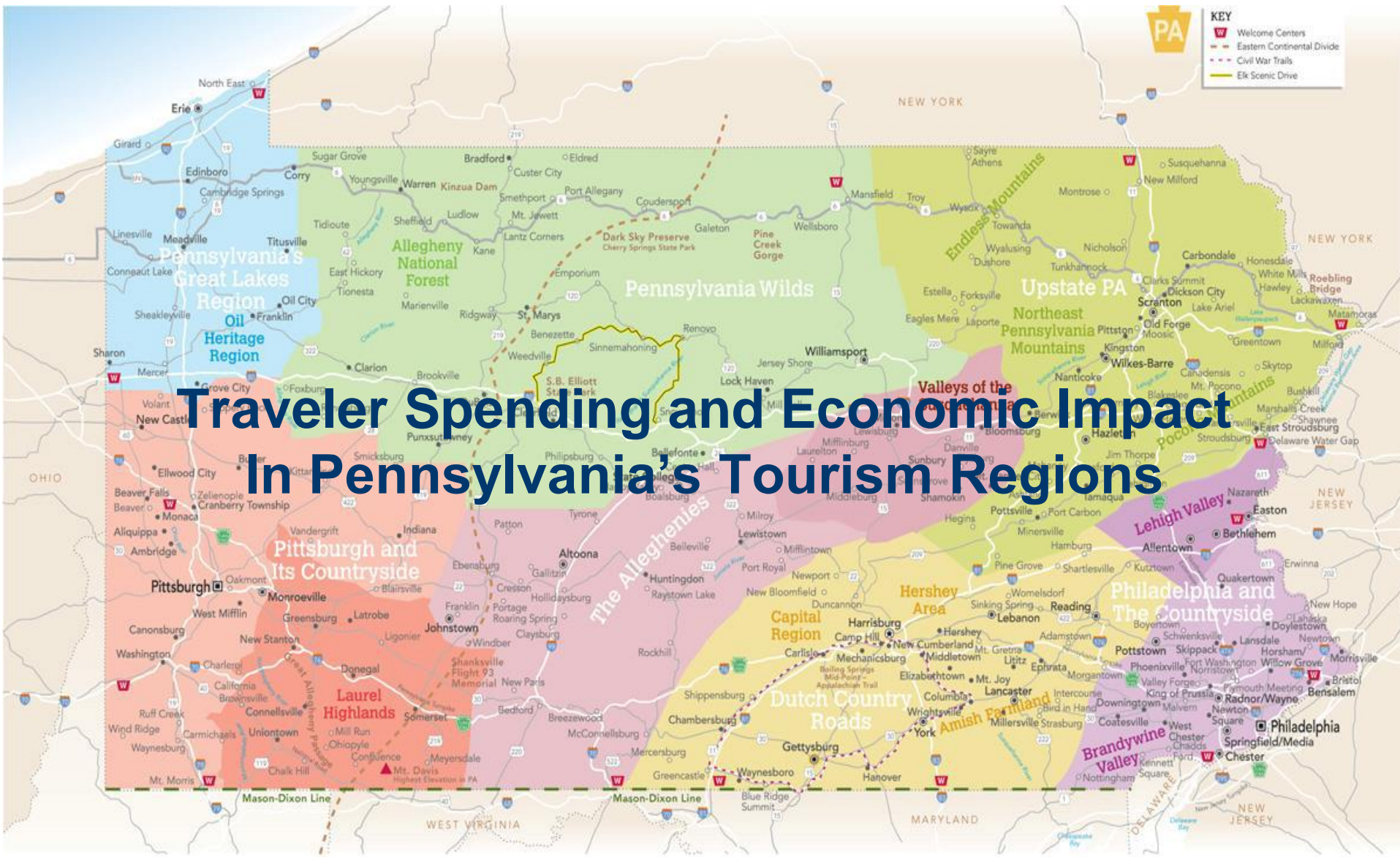
2014 Traveler Spending and Economic Impact By Region and County



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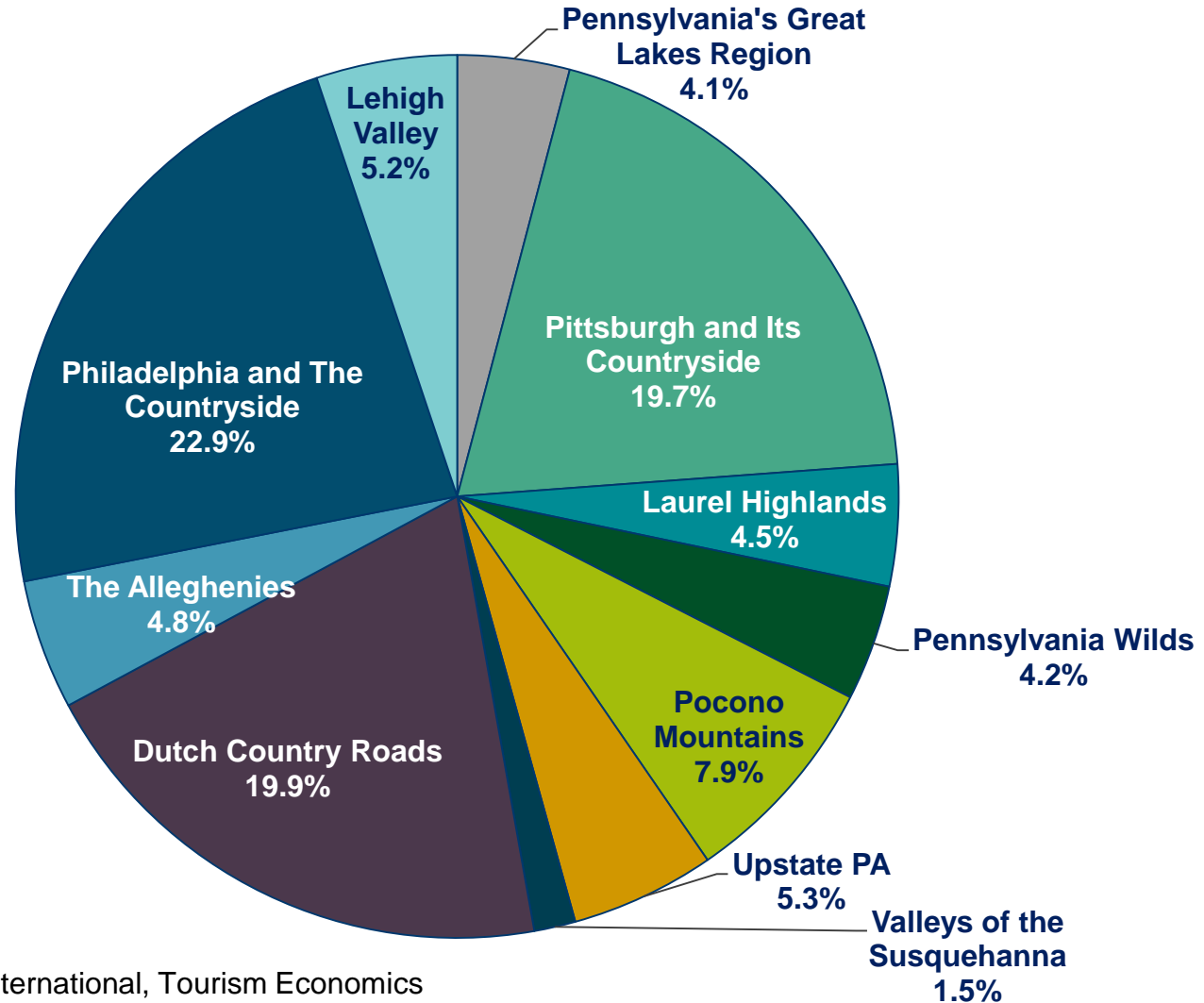
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Traveler Spending and Economic Impact In Pennsylvania's Tourism Regions



Percent of Traveler Spending by PA Region, 2015

Share of Total 2015 Visitor Spending in PA by Region

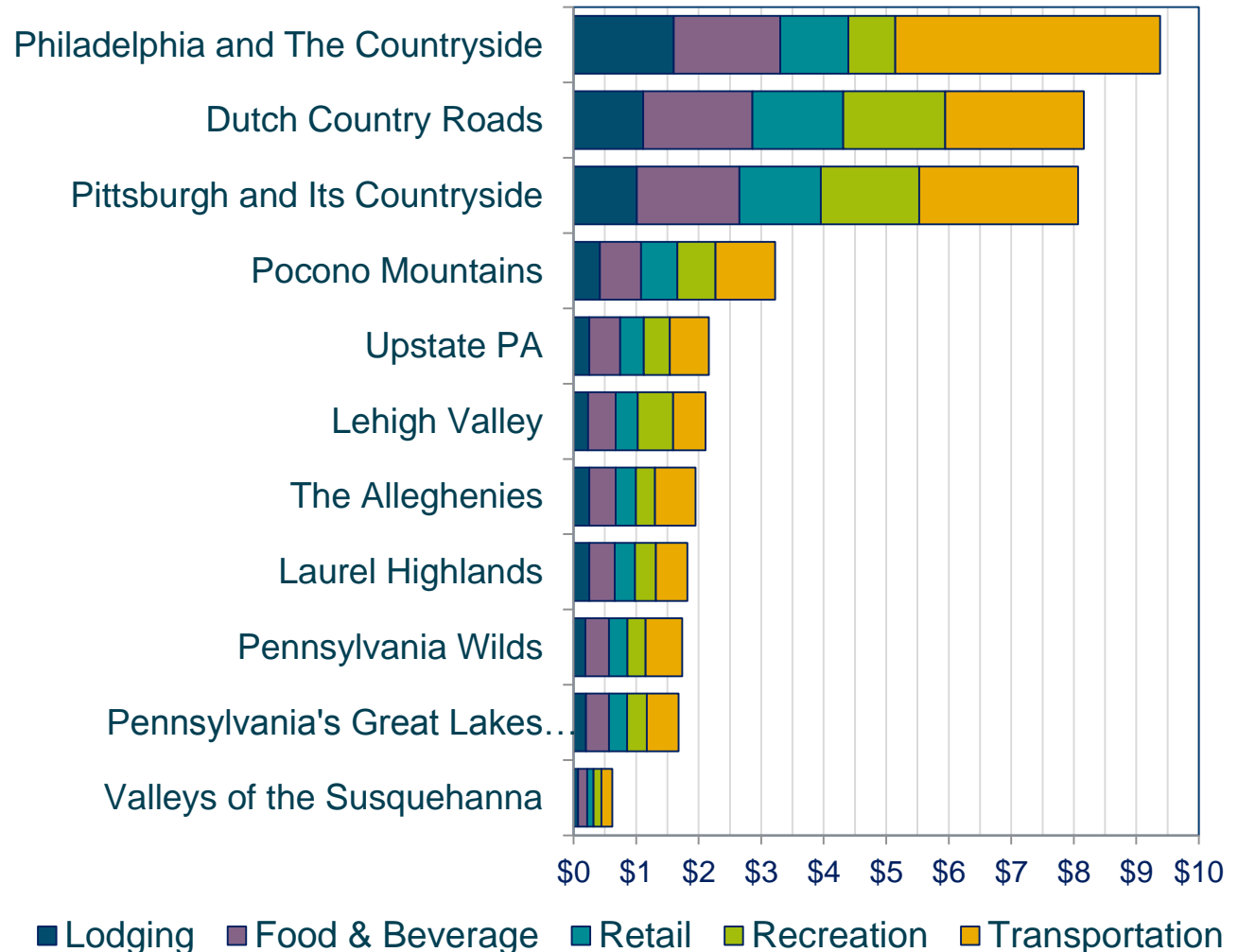


Source: Longwoods International, Tourism Economics

Traveler Spending in PA Regions by Category, 2015

- Travelers to the Lehigh Valley, Valleys of the Susquehanna, Dutch Country Roads, Pittsburgh, and Upstate PA regions spent proportionally more of their trip dollars on recreation than travelers to other regions in 2015.
- As in prior years, travelers to the Philadelphia & Its Countryside region spent far more of their trip dollars on transportation than travelers to other regions.

Traveler Spending by Category and Region
(in billions of U.S. dollars)

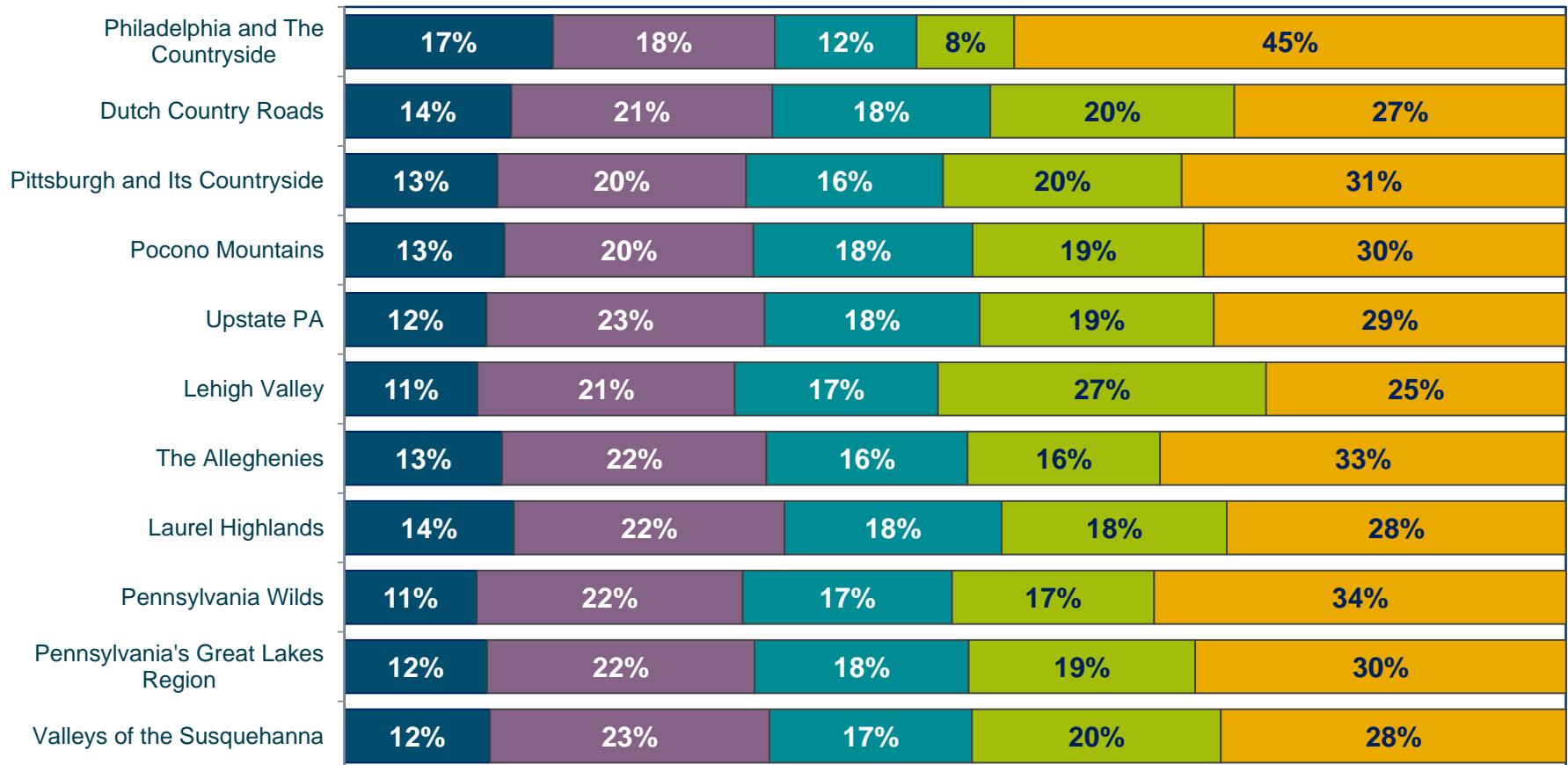


2015 PA Spending by Category -- % of Region Total

- While still capturing the largest share of traveler dollars, the share going to transportation costs dropped in each region in 2015 as a result of the drop in fuel costs.

2015 Traveler Spending by Category and Region

Percent of Region Total



■ Lodging
 ■ Food & Beverage
 ■ Retail
 ■ Recreation
 ■ Transportation

PA Total Travel ECONOMY Employment & Intensity, 2015

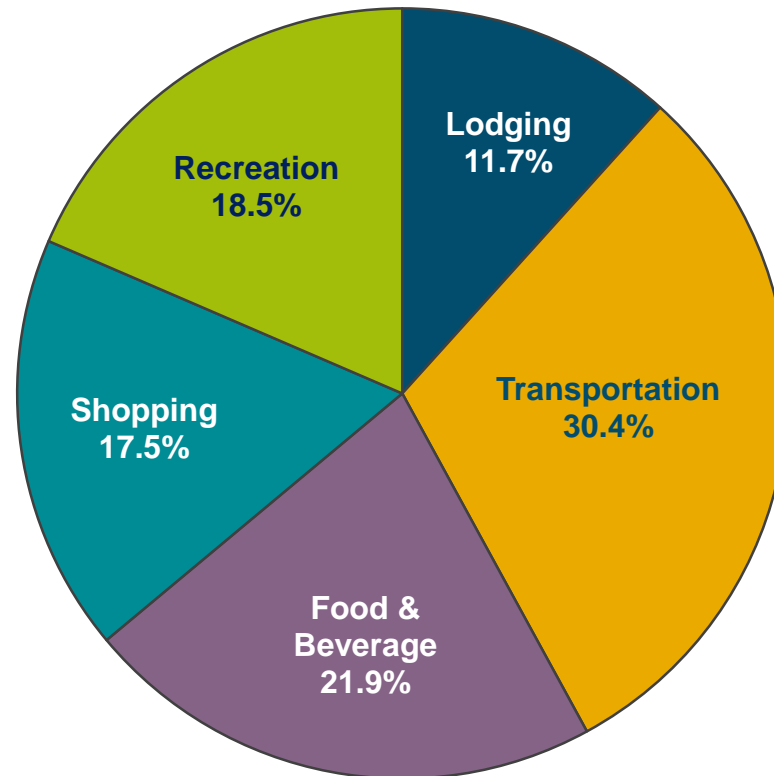
- Travel Employment Intensity is a measure of each county's reliance on the travel industry for jobs. The Pocono Mountains region is by far the most dependent of all PA tourism regions on the travel industry as a job provider in 2015. As in prior years, the Laurel Highlands region was a distant second, followed by the Pennsylvania Wilds.
- The Philadelphia region had the highest number of travel-related jobs, but the region's highly diverse economic base makes the region the least dependent with a similar pattern for the Pittsburgh & Its Countryside and Dutch Country Roads regions in 2015.



Pennsylvania's Great Lakes Region

- Pennsylvania's Great Lakes region is comprised of Crawford, Erie, Mercer and Venango counties.
- Travelers spent an estimated \$1.68 billion in the region in 2015 – a new record high (*in nominal dollars*) and a 1.9% increase from 2014.
- As in 2014, the region ranked 4th among the state's 11 tourism regions in the proportion of traveler dollars spent on food and beverage purchases in 2015.

Pennsylvania's Great Lakes Region 2015 Spending by Category

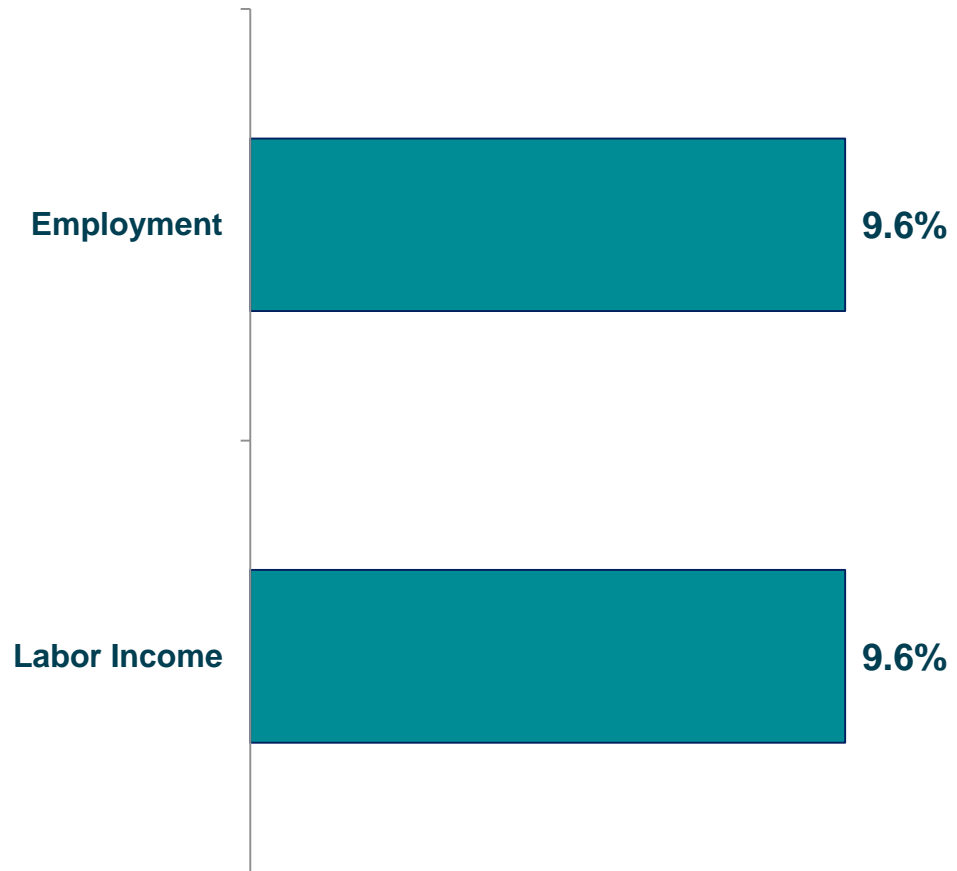


Source: Tourism Economics

Pennsylvania's Great Lakes Region

- The chart shows the travel economy's share (includes direct, indirect and induced impacts) of the region's total for both labor income and employment.
- The travel industry's share of the region's labor income grew to 9.6% in 2015, up from 9.4% in 2014, 9.2% in 2013, and 9.0% in 2012.
- As in the prior two years, Pennsylvania's Great Lakes Region ranked 9th in the number of travel-supported jobs among PA's 11 tourism regions, but 5th in employment intensity in 2015.

Travel Industry Share of Regional Economy



PA's Great Lakes Region – Traveler Spending & Employment Timelines

PENNSYLVANIA'S GREAT LAKES REGION TRAVELER SPENDING, 2005 – 2015 (dollar amounts in millions)

County	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Crawford	\$259.7	\$260.0	\$258.4	\$274.9	\$219.7	\$241.5	\$250.9	\$260.3	\$265.6	\$259.0	\$258.1
Erie	726.9	733.7	778.8	876.0	741.2	829.4	897.7	930.7	925.4	941.0	960.9
Mercer	240.8	241.1	243.2	279.8	233.2	256.0	279.8	304.9	319.9	315.9	315.4
Venango	119.2	116.1	118.7	130.2	108.7	118.3	123.0	132.1	130.9	132.5	144.9
Region Total	\$1,346.6	\$1,350.9	\$1,399.0	\$1,560.8	\$1,302.7	\$1,445.2	\$1,551.4	\$1,628.1	\$1,641.9	\$1,648.4	\$1,679.2
% Change	---	0.3%	3.6%	11.6%	-16.5%	10.9%	7.4%	4.9%	0.8%	0.4%	1.9%

PENNSYLVANIA'S GREAT LAKES REGION TRAVEL INDUSTRY EMPLOYMENT, 2005 – 2015

County	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Crawford	2,224	2,254	2,261	2,237	2,091	2,160	2,171	2,122	2,150	2,151	2,166
Erie	7,134	7,150	7,114	7,095	6,674	7,004	7,181	7,347	7,516	7,639	7,715
Mercer	2,574	2,571	2,537	2,513	2,343	2,417	2,485	2,557	2,614	2,640	2,627
Venango	1,108	1,146	1,171	1,191	1,113	1,138	1,153	1,143	1,158	1,166	1,188
Region Total	13,040	13,121	13,084	13,036	12,221	12,719	12,989	13,169	13,437	13,596	13,696
% Change	---	0.6%	-0.3%	-0.4%	-6.3%	4.1%	2.1%	1.4%	2.0%	1.2%	0.7%

PA's Great Lakes Region – Traveler Spending by Category

PENNSYLVANIA'S GREAT LAKES REGION TRAVELER SPENDING BY CATEGORY, 2014 and 2015 (dollar amounts in millions)

2015	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Crawford	\$18.4	\$62.5	\$44.7	\$40.8	\$91.6	\$258.1
Erie	123.8	206.9	162.6	197.3	270.3	960.9
Mercer	41.9	73.4	65.2	52.8	82.0	315.4
Venango	11.9	25.0	21.9	20.1	66.0	144.9
Region Total	\$196.1	\$367.7	\$294.5	\$311.1	\$509.9	\$1,679.2
% Change	2.1%	3.7%	0.8%	3.9%	-0.1%	1.9%

2014	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Crawford	\$19.2	\$61.3	\$45.9	\$40.6	\$92.1	\$259.0
Erie	118.9	197.9	160.3	190.3	273.6	941.0
Mercer	42.7	71.7	64.8	52.7	84.0	315.9
Venango	11.2	23.8	21.0	15.8	60.8	132.5
Region Total	\$192.0	\$354.6	\$292.0	\$299.4	\$510.4	\$1,648.4

PA's Great Lakes Region – Tourism Satellite Account

PENNSYLVANIA'S GREAT LAKES REGION TOURISM SATELLITE ACCOUNT CATEGORIES, 2014 and 2015 (dollar amounts in millions)

2015	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Crawford	\$258.1	\$0.4	\$13.5	\$272.0
Erie	960.9	5.2	50.4	1,016.5
Mercer	315.4	0.8	16.6	332.8
Venango	144.9	0.2	7.6	152.7
Region Total	\$1,679.2	\$6.6	\$88.2	\$1,774.0
% Change	1.9%	4.6%	3.9%	2.0%

2014	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Crawford	\$259.0	\$0.4	\$13.3	\$272.7
Erie	941.0	4.9	48.5	994.3
Mercer	315.9	0.8	16.3	333.0
Venango	132.5	0.2	6.8	139.5
Region Total	\$1,648.4	\$6.3	\$84.9	\$1,739.6

*Non-Traveler Personal Consumption Expenditures represent travel-related consumer durable purchases, such as an RV, boat, or furniture for a vacation home.

PA's Great Lakes Region – Travel Industry Impacts, 2014 & 2015

PENNSYLVANIA'S GREAT LAKES REGION TRAVEL INDUSTRY IMPACTS, 2014 and 2015 (dollar amounts in millions)

2015	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Crawford	\$258.1	2,166	\$51.5	\$13.4	\$12.1
Erie	960.9	7,715	203.3	54.8	46.5
Mercer	315.4	2,627	56.1	16.1	13.8
Venango	144.9	1,188	30.3	7.7	7.0
Region Total	\$1,679.2	13,696	\$341.2	\$92.1	\$79.3
% Change	1.9%	0.7%	3.6%	1.2%	2.9%

2014	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Crawford	\$259.0	2,151	\$50.2	\$13.5	\$11.9
Erie	941.0	7,639	193.8	53.8	44.8
Mercer	315.9	2,640	56.2	16.4	13.8
Venango	132.5	1,166	29.2	7.3	6.6
Region Total	\$1,648.4	13,596	\$329.4	\$91.0	\$77.0

PA's Great Lakes Region –Travel Economy Impacts, 2014 & 2015

PENNSYLVANIA'S GREAT LAKES REGION TRAVEL ECONOMY IMPACTS, 2014 and 2015 (dollar amounts in millions)

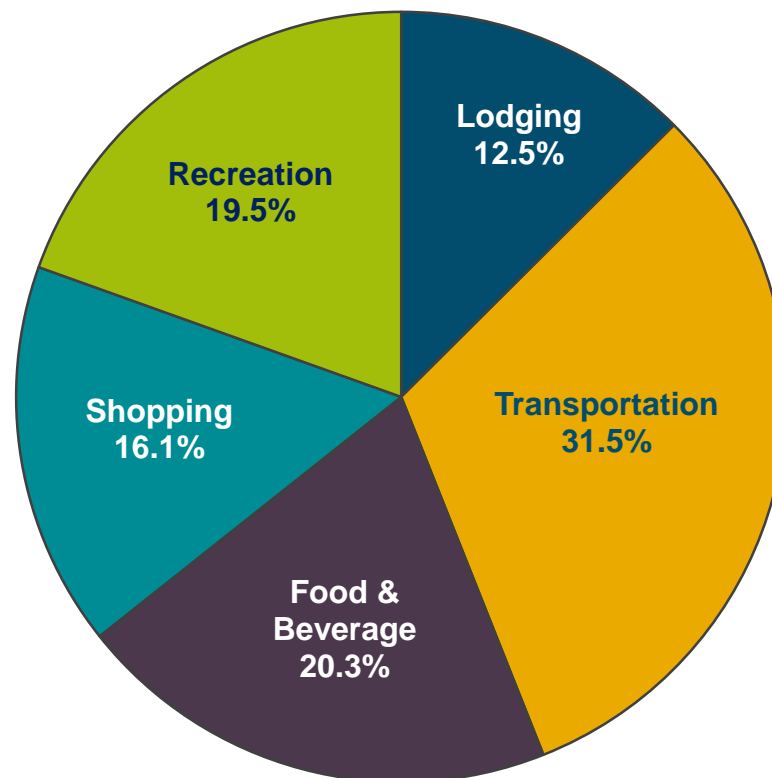
2015	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Crawford	\$272.0	3,456	\$107.6	\$23.7	\$24.3
Erie	1,016.5	11,923	396.6	94.1	93.6
Mercer	332.8	4,140	118.8	28.2	27.8
Venango	152.7	1,903	62.4	13.6	14.0
Region Total	\$1,774.0	21,422	\$685.3	\$159.6	\$159.6
% Change	2.0%	1.8%	2.6%	1.0%	2.9%

2014	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Crawford	\$272.7	3,395	\$105.6	\$23.9	\$23.9
Erie	994.3	11,695	382.5	92.5	90.2
Mercer	333.0	4,108	118.9	28.7	27.8
Venango	139.5	1,851	60.8	12.9	13.2
Region Total	\$1,739.6	21,049	\$667.7	\$158.0	\$155.1

Pittsburgh & Its Countryside

- Pittsburgh & Its Countryside region is comprised of the following eight counties: Allegheny, Armstrong, Beaver, Butler, Greene, Indiana, Lawrence, and Washington.
- Travelers spent nearly \$8.1 billion in the region in 2015 - a 3.8% increase from 2014 and new record high. As in prior years, the region had the third highest level of traveler spending level of the state's 11 tourism regions.
- The region had the largest increase in the dollar amount of traveler spending between 2014 and 2013, and ranked third in the percentage increase among the state's tourism regions.

Pittsburgh and Its Countryside Region 2015 Spending by Category

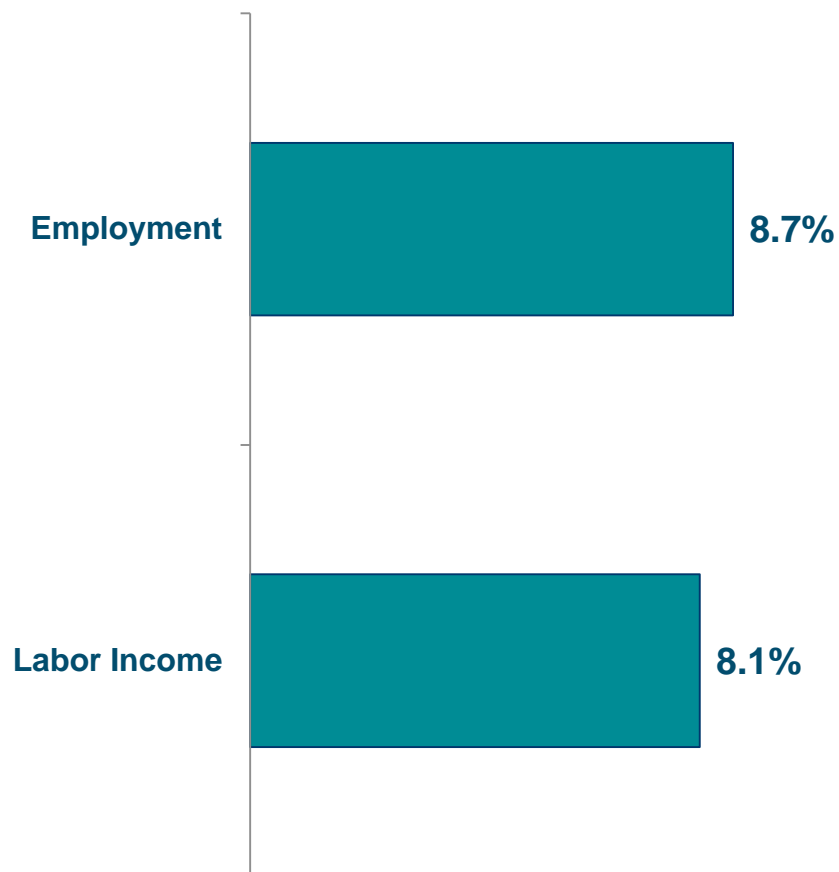


Source: Tourism Economics

Pittsburgh & Its Countryside

- The chart shows the travel economy's share (including direct, indirect, and induced impacts) of the region's total for both labor income and employment.
- The travel industry's share of the Pittsburgh region's total labor income was 8.1% in 2015, while the industry's share of the region's employment base was higher at 8.7%, with both showing increases from 2014.
- As in prior years, the region had the 3rd highest number of travel-supported jobs of the state's 11 tourism regions and ranked 7th in the industry's employment intensity in 2015.

Travel Industry Share of Regional Economy



Pittsburgh & Its Countryside – Traveler Spending & Employment Timelines

PITTSBURGH AND ITS COUNTRYSIDE TRAVELER SPENDING, 2005 – 2015 (dollar amounts in millions)

County	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Allegheny	\$4,010.2	\$4,096.5	\$4,360.9	\$4,979.8	\$4,354.6	\$4,828.1	\$5,232.6	\$5,494.0	\$5,575.1	\$5,675.2	\$5,987.7
Armstrong	67.1	68.3	71.2	75.3	58.6	71.3	84.1	89.8	91.3	90.8	88.9
Beaver	189.9	185.0	197.6	226.9	196.0	217.2	237.5	244.9	249.8	256.2	267.0
Butler	367.2	377.9	406.5	455.5	406.1	440.6	485.9	578.8	582.1	597.3	604.2
Greene	58.5	56.4	60.8	65.3	58.7	68.9	73.8	80.4	91.9	94.7	89.2
Indiana	129.5	124.7	135.3	152.6	144.5	154.2	169.8	184.3	179.1	175.3	162.0
Lawrence	89.0	92.0	95.0	101.4	83.7	98.6	113.5	118.9	117.9	119.6	120.1
Washington	404.7	415.0	451.2	497.1	482.3	582.7	668.7	740.7	755.3	760.0	747.0
Region Total	\$5,316.3	\$5,415.8	\$5,778.4	\$6,554.1	\$5,784.5	\$6,461.7	\$7,065.9	\$7,531.8	\$7,642.5	\$7,769.2	\$8,066.0
% Change	---	1.9%	6.7%	13.4%	-11.7%	11.7%	9.4%	6.6%	1.5%	1.7%	3.8%

PITTSBURGH AND ITS COUNTRYSIDE TRAVEL INDUSTRY EMPLOYMENT, 2005 – 2015

County	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Allegheny	35,655	35,650	36,767	37,591	36,188	37,302	38,112	39,094	39,964	40,254	40,888
Armstrong	532	525	517	530	484	554	559	568	573	576	584
Beaver	2,121	2,106	2,125	2,109	1,977	1,965	1,975	1,997	2,048	2,070	2,096
Butler	3,624	3,708	3,789	3,739	3,664	3,740	3,828	3,941	3,996	4,050	4,048
Greene	391	400	410	417	419	479	479	483	485	488	487
Indiana	1,296	1,297	1,320	1,342	1,347	1,351	1,381	1,427	1,450	1,460	1,426
Lawrence	831	842	854	863	806	873	877	896	907	917	909
Washington	4,625	4,824	4,877	4,995	5,026	5,570	5,740	5,840	5,949	5,953	5,948
Region Total	49,075	49,353	50,658	51,586	49,911	51,834	52,952	54,246	55,374	55,767	56,388
% Change	---	0.6%	2.6%	1.8%	-3.2%	3.9%	2.2%	2.4%	2.1%	0.7%	1.1%

Pittsburgh & Its Countryside – Traveler Spending by Category

PITTSBURGH AND ITS COUNTRYSIDE TRAVELER SPENDING BY CATEGORY, 2014 and 2015 (dollar amounts in millions)

2015	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Allegheny	\$777.0	\$1,195.1	\$949.7	\$1,156.6	\$1,916.3	\$5,987.7
Armstrong	4.0	17.5	11.8	25.8	29.9	88.9
Beaver	19.1	56.5	43.8	41.9	105.8	267.0
Butler	84.2	133.7	111.4	100.1	174.7	604.2
Greene	13.0	20.3	15.0	13.8	27.0	89.2
Indiana	18.4	38.9	29.7	27.2	48.0	162.0
Lawrence	7.5	27.9	23.6	23.7	37.4	120.1
Washington	94.5	151.2	117.2	186.2	197.9	747.0
Region Total	\$1,010.6	\$1,641.0	\$1,302.2	\$1,575.3	\$2,537.0	\$8,066.0
% Change	4.3%	4.3%	2.2%	4.0%	4.0%	3.8%

2014	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Allegheny	\$719.4	\$1,129.2	\$916.1	\$1,099.4	\$1,811.0	\$5,675.2
Armstrong	4.0	17.0	13.3	25.7	30.8	90.8
Beaver	18.6	54.3	43.6	40.4	99.3	256.2
Butler	83.0	131.0	108.2	97.7	177.4	597.3
Greene	14.6	21.1	15.8	14.6	28.5	94.7
Indiana	21.9	40.9	32.7	28.6	51.3	175.3
Lawrence	7.3	27.3	23.6	23.5	38.0	119.6
Washington	100.5	152.1	120.9	184.5	202.0	760.0
Region Total	\$969.3	\$1,572.9	\$1,274.2	\$1,514.4	\$2,438.3	\$7,769.2

Pittsburgh & Its Countryside – Tourism Satellite Account

PITTSBURGH AND ITS COUNTRYSIDE TOURISM SATELLITE ACCOUNT CATEGORIES, 2014 and 2015 (dollar amounts in millions)

2015	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Allegheny	\$5,987.7	\$37.2	\$314.4	\$6,339.3
Armstrong	88.9	0.1	4.7	93.7
Beaver	267.0	0.5	14.0	281.5
Butler	604.2	1.8	31.7	637.7
Greene	89.2	0.3	4.7	94.1
Indiana	162.0	0.4	8.5	170.9
Lawrence	120.1	0.2	6.3	126.6
Washington	747.0	2.1	39.2	788.3
Region Total	\$8,066.0	\$42.6	\$423.5	\$8,532.2
% Change	3.8%	6.9%	5.8%	3.9%

2014	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Allegheny	\$5,675.2	\$34.5	\$292.3	\$6,002.0
Armstrong	90.8	0.1	4.7	95.6
Beaver	256.2	0.4	13.2	269.8
Butler	597.3	1.8	30.8	629.9
Greene	94.7	0.3	4.9	99.9
Indiana	175.3	0.5	9.0	184.9
Lawrence	119.6	0.2	6.2	126.0
Washington	760.0	2.1	39.1	801.2
Region Total	\$7,769.2	\$39.9	\$400.1	\$8,209.2

*Non-Traveler Personal Consumption Expenditures represent travel-related consumer durable purchases, such as an RV, boat, or furniture for a vacation home.

Pittsburgh & Its Countryside – Travel Industry Impacts, 2014 & 2015

PITTSBURGH AND ITS COUNTRYSIDE TRAVEL INDUSTRY IMPACTS, 2014 and 2015 (dollar amounts in millions)

2015	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Allegheny	\$5,987.7	40,888	\$1,542.7	\$372.5	\$327.2
Armstrong	88.9	584	14.6	4.3	3.7
Beaver	267.0	2,096	58.7	14.5	13.2
Butler	604.2	4,048	108.8	31.2	26.6
Greene	89.2	487	11.7	4.2	3.3
Indiana	162.0	1,426	33.4	8.7	7.7
Lawrence	120.1	909	23.7	6.3	5.6
Washington	747.0	5,948	178.9	42.6	39.0
Region Total	\$8,066.0	56,388	\$1,972.6	\$484.3	\$426.4
% Change	3.8%	1.1%	6.3%	3.5%	5.4%

2014	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Allegheny	\$5,675.2	40,254	\$1,440.4	\$355.5	\$307.3
Armstrong	90.8	576	14.0	4.4	3.7
Beaver	256.2	2,070	56.0	14.0	12.6
Butler	597.3	4,050	106.7	31.2	26.2
Greene	94.7	488	11.3	4.4	3.4
Indiana	175.3	1,460	32.4	9.2	7.8
Lawrence	119.6	917	23.0	6.3	5.5
Washington	760.0	5,953	171.7	43.0	38.2
Region Total	\$7,769.2	55,767	\$1,855.5	\$468.1	\$404.7

Pittsburgh & Its Countryside – Travel Economy Impacts, 2014 & 2015

PITTSBURGH AND ITS COUNTRYSIDE TRAVEL ECONOMY IMPACTS, 2014 and 2015 (dollar amounts in millions)

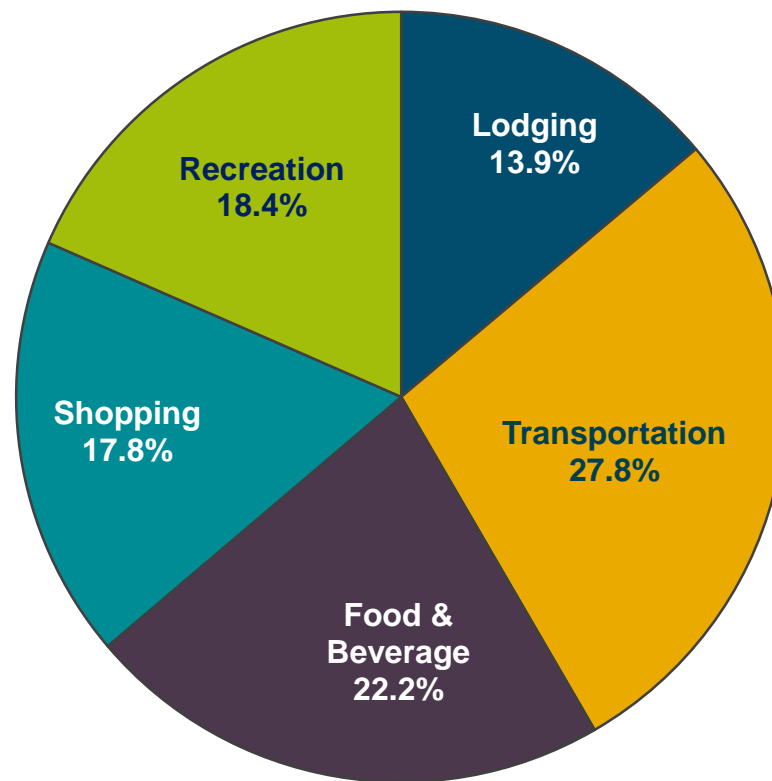
2015	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Allegheny	\$6,339.3	61,384	\$2,725.2	\$638.5	\$660.0
Armstrong	93.7	1,175	40.4	7.6	7.5
Beaver	281.5	3,676	131.4	25.6	26.6
Butler	637.7	6,409	217.8	54.5	53.5
Greene	94.1	883	28.9	7.3	6.7
Indiana	170.9	2,382	74.5	15.2	15.5
Lawrence	126.6	1,703	59.0	11.0	11.2
Washington	788.3	9,130	336.5	74.8	78.6
Region Total	\$8,532.2	86,741	\$3,613.6	\$834.5	\$859.7
% Change	3.9%	2.0%	5.1%	3.3%	5.4%

2014	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Allegheny	\$6,002.0	59,977	\$2,571.9	\$610.7	\$619.7
Armstrong	95.6	1,142	39.4	7.7	7.4
Beaver	269.8	3,584	127.3	24.8	25.4
Butler	629.9	6,334	214.7	54.5	52.7
Greene	99.9	870	28.3	7.7	6.8
Indiana	184.9	2,391	73.1	16.1	15.8
Lawrence	126.0	1,682	57.9	11.1	11.0
Washington	801.2	9,037	325.8	75.5	77.1
Region Total	\$8,209.2	85,016	\$3,438.4	\$808.1	\$815.8

Laurel Highlands

- The Laurel Highlands in southwestern PA is comprised of the following counties: Fayette, Somerset, and Westmorland.
- Travelers spent over \$1.8 billion in the region in 2015 – down slightly (-0.9%) from 2014. The decrease was largely tied to a drop in spending on lodging and transportation that offset an increase in purchases of food and beverages and on recreation.
- The region continued to have the second highest proportion of traveler dollars going to lodging despite the decrease in spending, and the third highest share of trip dollars on food & beverage purchases and shopping among the state's tourism regions.

**Laurel Highlands Region
2015 Spending by Category**

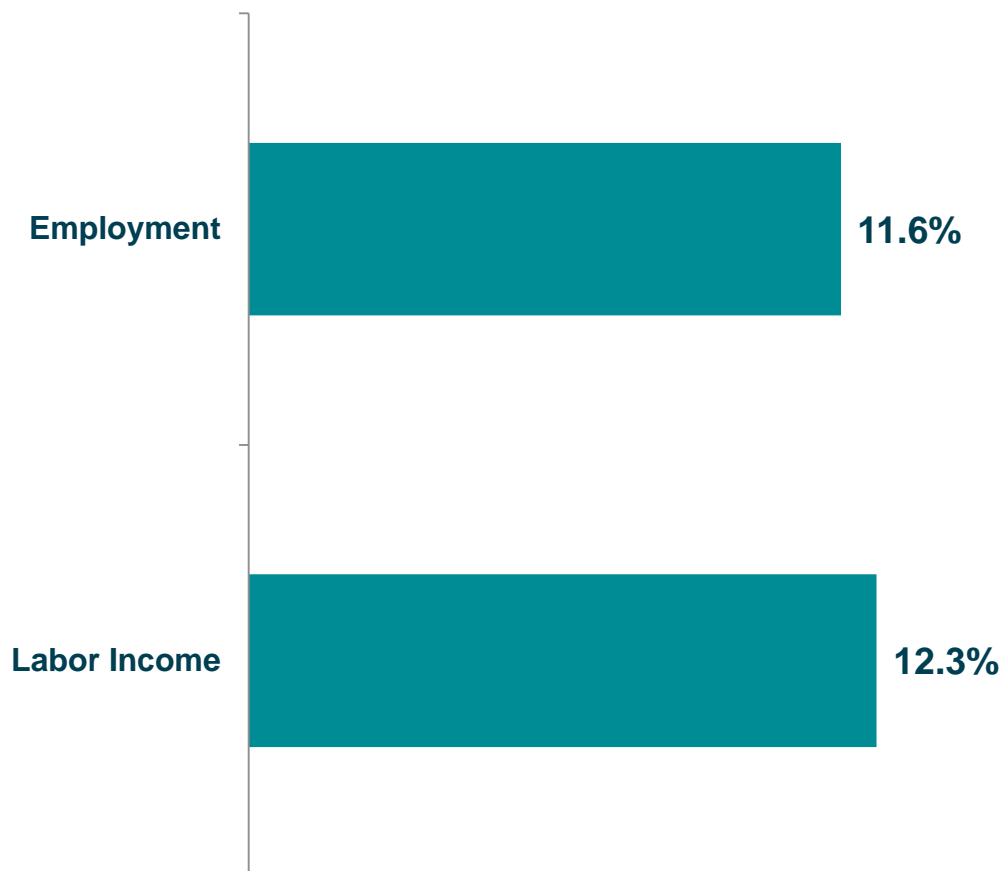


Source: Tourism Economics

Laurel Highlands

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- The travel industry's share of the Laurel Highlands region total labor income was 12.3% in 2015 – a small increase from 2014.
- The travel industry supported 11.6% of the region's total job count – the same percentage as in the previous two years. As in 2013 and 2014, this was the second highest percentage of travel-supported jobs among the state's tourism regions. The region ranked 7th in the actual number of travel-supported jobs.

Travel Industry Share of Regional Economy



Laurel Highlands – Traveler Spending & Employment Timelines

LAUREL HIGHLANDS TRAVELER SPENDING, 2005 – 2015 (dollar amounts in millions)

County	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Fayette	\$543.4	\$562.1	\$563.6	\$618.4	\$538.2	\$595.7	\$636.1	\$643.9	\$663.8	\$677.5	\$667.2
Somerset	322.0	309.6	325.2	357.2	306.9	330.1	371.2	378.7	380.2	387.7	399.9
Westmoreland	609.9	621.0	623.5	706.4	587.6	651.6	724.9	745.9	742.6	772.2	753.9
Region Total	\$1,475.3	\$1,492.8	\$1,512.2	\$1,682.0	\$1,432.6	\$1,577.3	\$1,732.2	\$1,768.5	\$1,786.6	\$1,837.4	\$1,821.1
% Change	---	1.2%	1.3%	11.2%	-14.8%	10.1%	9.8%	2.1%	1.0%	2.8%	-0.9%

LAUREL HIGHLANDS TRAVEL INDUSTRY EMPLOYMENT, 2005 – 2015

County	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Fayette	5,275	5,273	5,272	5,241	5,047	5,219	5,295	5,417	5,808	5,836	5,834
Somerset	3,466	3,449	3,431	3,449	3,255	3,234	3,257	3,193	3,285	3,331	3,322
Westmoreland	5,512	5,510	5,539	5,582	5,243	5,369	5,476	5,632	5,716	5,764	5,661
Region Total	14,253	14,232	14,242	14,272	13,544	13,822	14,028	14,242	14,809	14,932	14,817
% Change	---	-0.1%	0.1%	0.2%	-5.1%	2.1%	1.5%	1.5%	4.0%	0.8%	-0.8%

Laurel Highlands – Traveler Spending by Category

LAUREL HIGHLANDS TRAVELER SPENDING BY CATEGORY, 2014 and 2015 (dollar amounts in millions)

2015	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Fayette	\$116.1	\$148.4	\$115.0	\$129.1	\$158.7	\$667.2
Somerset	57.8	89.8	66.0	71.5	114.9	399.9
Westmoreland	78.7	165.5	142.4	135.4	231.9	753.9
Region Total	\$252.6	\$403.7	\$323.4	\$335.9	\$505.4	\$1,821.1
% Change	-1.2%	0.8%	-1.5%	0.6%	-2.6%	-0.9%

2014	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Fayette	\$117.7	\$149.0	\$117.6	\$127.8	\$165.5	\$677.5
Somerset	55.6	85.8	64.6	67.6	114.0	387.7
Westmoreland	82.5	165.7	146.0	138.6	239.3	772.2
Region Total	\$255.8	\$400.6	\$328.3	\$334.0	\$518.8	\$1,837.4

Laurel Highlands – Tourism Satellite Account

LAUREL HIGHLANDS TOURISM SATELLITE ACCOUNT CATEGORIES, 2014 and 2015 (dollar amounts in millions)

2015	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Fayette	\$667.2	\$1.4	\$35.0	\$703.6
Somerset	399.9	1.0	21.0	421.9
Westmoreland	753.9	1.6	39.6	795.1
Region Total	\$1,821.1	\$4.0	\$95.6	\$1,920.7
% Change	-0.9%	1.3%	1.0%	-0.8%

2014	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Fayette	\$677.5	\$1.3	\$34.9	\$713.8
Somerset	387.7	1.0	20.0	408.6
Westmoreland	772.2	1.6	39.8	813.6
Region Total	\$1,837.4	\$3.9	\$94.6	\$1,936.0

*Non-Traveler Personal Consumption Expenditures represent travel-related consumer durable purchases, such as an RV, boat, or furniture for a vacation home.

Laurel Highlands – Travel Industry Impacts, 2014 & 2015

LAUREL HIGHLANDS TRAVEL INDUSTRY IMPACTS, 2014 and 2015 (dollar amounts in millions)

2015	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Fayette	\$667.2	5,834	\$170.0	\$38.5	\$36.2
Somerset	399.9	3,322	89.1	22.1	20.0
Westmoreland	753.9	5,661	138.4	38.6	33.6
Region Total	\$1,821.1	14,817	\$397.5	\$99.2	\$89.7
% Change	-0.9%	-0.8%	1.9%	-1.2%	0.8%

2014	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Fayette	\$677.5	5,836	\$163.9	\$38.9	\$35.6
Somerset	387.7	3,331	88.2	21.9	19.6
Westmoreland	772.2	5,764	138.0	39.7	33.8
Region Total	\$1,837.4	14,932	\$390.1	\$100.5	\$89.0

Laurel Highlands – Travel Economy Impacts, 2014 & 2015

LAUREL HIGHLANDS TRAVEL ECONOMY IMPACTS, 2014 and 2015 (dollar amounts in millions)

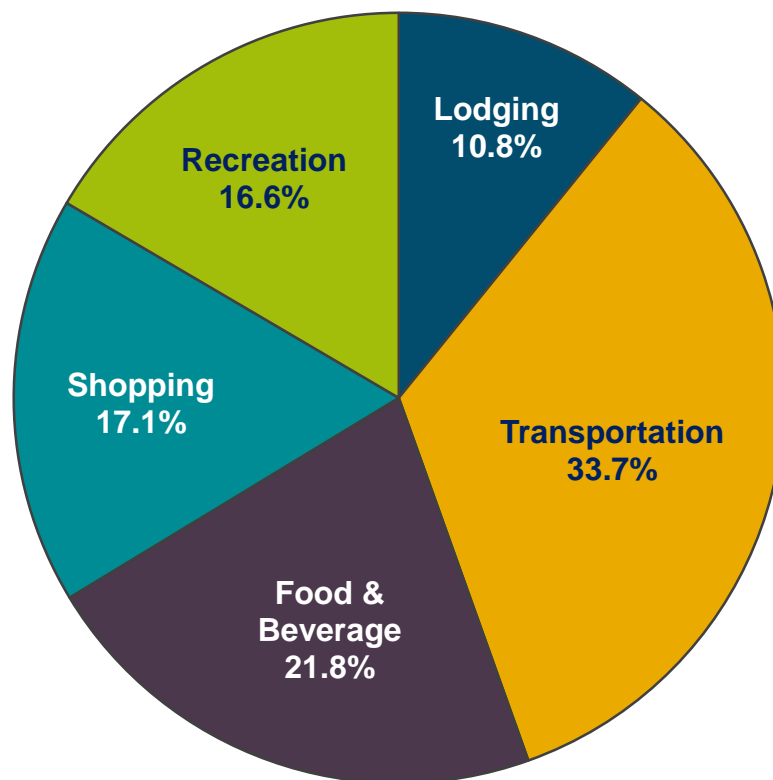
2015	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Fayette	\$703.6	8,373	\$297.1	\$68.0	\$73.0
Somerset	421.9	4,922	164.2	38.8	40.2
Westmoreland	795.1	9,613	311.4	67.8	67.6
Region Total	\$1,920.7	22,908	\$772.8	\$174.6	\$180.8
% Change	-0.8%	0.5%	1.4%	-1.4%	0.8%

2014	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Fayette	\$713.8	8,308	\$288.0	\$68.7	\$71.7
Somerset	408.6	4,888	162.9	38.5	39.5
Westmoreland	813.6	9,604	310.8	69.8	68.1
Region Total	\$1,936.0	22,800	\$761.7	\$176.9	\$179.3

Pennsylvania Wilds

- The Pennsylvania Wilds region is comprised of the following northern tier counties: Cameron, Clarion, Clearfield, Clinton, Elk, Forest, Jefferson, Lycoming, McKean, Potter, Tioga, and Warren.
- Travelers spent well over \$1.7 billion in the Pennsylvania Wilds region in 2015 – a 0.8% increase from 2014.
- As in 2014, the region had the second highest proportion of traveler dollars spent on transportation and the third lowest amount spent on recreation in 2015 – reflecting the continued impact of those who travel to the region for work related to Marcellus Shale.

Pennsylvania Wilds Region 2015 Spending by Category

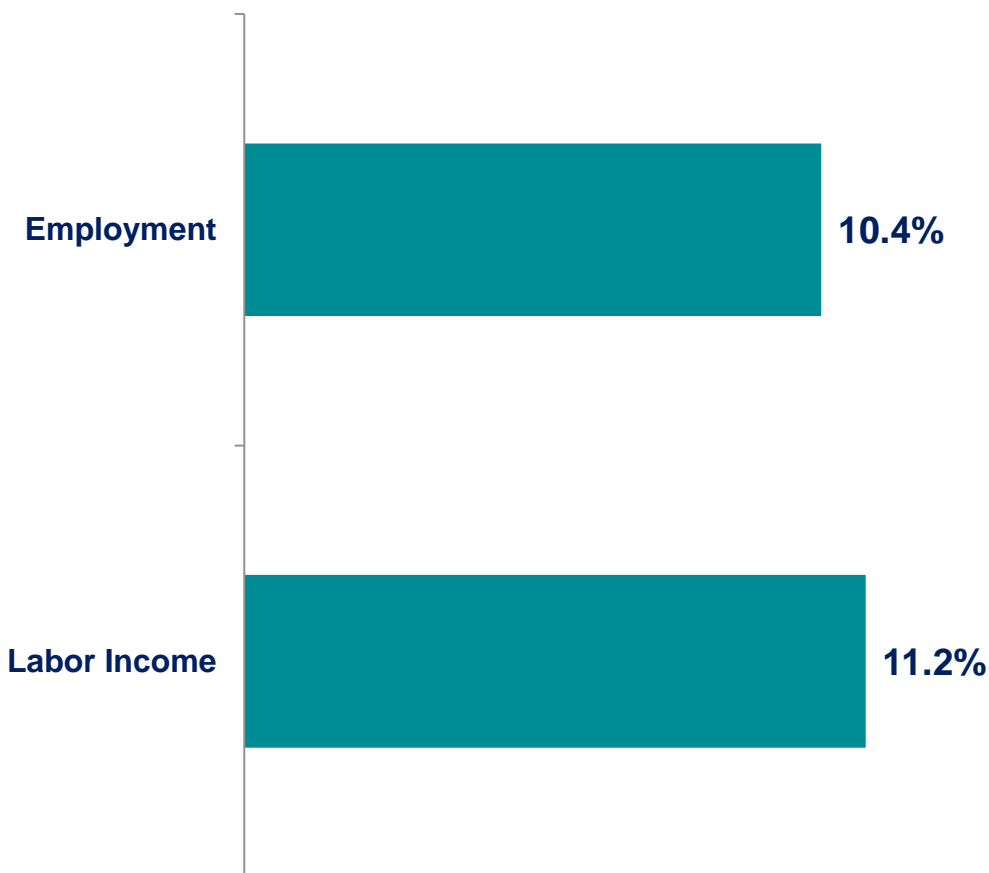


Source: Tourism Economics

Pennsylvania Wilds

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- The travel industry was responsible for 11.2% of the labor income earned in the Pennsylvania Wilds region in 2015 – a proportion that was above the industry's employment share of 10.4% - with both showing slight increases from 2014.
- As in 2013 and 2014, the region ranked tenth among the state's 11 tourism regions in the number of travel-supported jobs, and third in the industry's employment intensity in 2015.

Travel Industry Share of Regional Economy



Pennsylvania Wilds – Traveler Spending Timeline

PENNSYLVANIA WILDS TRAVELER SPENDING, 2005 – 2015 (dollar amounts in millions)

County	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Cameron	\$7.8	\$7.9	\$8.4	\$9.3	\$7.8	\$9.0	\$9.5	\$9.6	\$9.6	\$9.4	\$9.7
Clarion	90.1	94.3	101.7	112.0	93.5	108.1	112.5	118.6	121.5	115.4	117.7
Clearfield	222.6	227.5	233.5	250.3	212.3	248.9	261.8	264.3	265.5	276.5	270.0
Clinton	109.8	108.9	111.1	123.2	108.0	136.6	151.4	153.9	150.6	147.5	147.7
Elk	47.9	47.8	51.5	57.9	47.2	52.3	61.4	66.1	66.0	69.3	74.7
Forest	18.2	18.6	19.7	21.2	18.5	20.4	23.7	22.6	23.4	23.2	27.0
Jefferson	93.0	90.3	92.6	97.8	82.2	102.9	109.9	113.6	115.1	115.1	119.1
Lycoming	231.2	241.5	255.6	293.1	269.3	308.7	384.4	398.2	405.9	391.3	382.5
McKean	119.6	120.0	126.1	138.9	123.2	158.9	164.0	173.4	174.5	174.7	174.7
Potter	24.6	25.1	26.6	29.3	27.0	30.1	36.6	34.3	34.5	35.4	38.8
Tioga	144.1	139.5	149.1	159.1	139.5	171.2	192.3	193.4	187.6	190.9	195.2
Warren	121.5	127.9	137.0	157.8	137.7	149.3	162.5	169.4	169.3	173.8	178.6
Region Total	\$1,230.4	\$1,249.3	\$1,312.9	\$1,450.1	\$1,266.2	\$1,496.4	\$1,670.0	\$1,717.3	\$1,723.4	\$1,722.4	\$1,735.7
% Change	---	1.5%	5.1%	10.4%	-12.7%	18.2%	11.6%	2.8%	0.4%	-0.1%	0.8%

Pennsylvania Wilds – Employment Timeline

PENNSYLVANIA WILDS TRAVEL INDUSTRY EMPLOYMENT, 2005 – 2015

County	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Cameron	75	76	78	79	73	74	75	75	76	76	76
Clarion	956	952	947	963	899	972	993	1,022	1,046	1,051	1,071
Clearfield	1,499	1,553	1,594	1,623	1,594	1,770	1,793	1,775	1,778	1,817	1,799
Clinton	805	802	818	835	798	952	990	993	1,040	1,045	1,064
Elk	487	494	495	496	462	488	509	531	554	557	573
Forest	124	125	129	131	124	135	136	137	137	138	138
Jefferson	699	714	719	732	683	747	762	785	804	807	821
Lycoming	2,504	2,497	2,553	2,573	2,538	2,707	2,790	2,901	2,973	2,961	2,952
McKean	999	988	1,008	997	943	1,112	1,130	1,114	1,138	1,144	1,164
Potter	186	188	193	197	195	206	216	229	241	242	246
Tioga	1,272	1,260	1,250	1,253	1,215	1,387	1,451	1,462	1,530	1,535	1,573
Warren	1,128	1,123	1,142	1,154	1,123	1,133	1,149	1,120	1,141	1,147	1,156
Region Total	10,733	10,772	10,926	11,032	10,648	11,684	11,993	12,142	12,456	12,519	12,632
% Change	---	0.4%	1.4%	1.0%	-3.5%	9.7%	2.6%	1.2%	2.6%	0.5%	0.9%

Pennsylvania Wilds – 2015 Traveler spending by category

PENNSYLVANIA WILDS TRAVELER SPENDING BY CATEGORY, 2015 (dollar amounts in millions)

2015	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Cameron	\$0.6	\$1.8	\$1.7	\$2.5	\$3.1	\$9.7
Clarion	14.5	26.6	21.3	21.4	33.9	117.7
Clearfield	28.5	58.3	50.7	43.4	89.0	270.0
Clinton	14.1	33.1	23.6	25.6	51.3	147.7
Elk	9.2	18.2	14.1	12.6	20.6	74.7
Forest	4.1	5.6	5.8	4.7	6.8	27.0
Jefferson	9.2	21.9	17.1	21.7	49.3	119.1
Lycoming	50.0	89.7	65.4	56.8	120.6	382.5
McKean	19.5	36.0	26.7	28.4	64.2	174.7
Potter	5.7	8.1	6.7	6.9	11.4	38.8
Tioga	23.8	43.0	34.0	34.2	60.2	195.2
Warren	8.9	35.6	30.2	29.3	74.7	178.6
Region Total	\$188.0	\$378.1	\$297.3	\$287.3	\$585.1	\$1,735.7
% Change	0.0%	2.6%	1.0%	3.0%	-1.3%	0.8%

Pennsylvania Wilds – 2014 Traveler spending by category

PENNSYLVANIA WILDS TRAVELER SPENDING BY CATEGORY, 2014 (dollar amounts in millions)

2014	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Cameron	\$0.5	\$1.7	\$1.7	\$2.4	\$3.1	\$9.4
Clarion	14.3	25.7	21.0	19.8	34.6	115.4
Clearfield	31.0	58.9	51.9	44.3	90.4	276.5
Clinton	14.2	32.2	23.7	25.0	52.3	147.5
Elk	8.2	17.0	13.4	10.5	20.1	69.3
Forest	3.2	4.9	4.8	4.1	6.2	23.2
Jefferson	8.8	20.9	16.7	22.5	46.2	115.1
Lycoming	52.0	89.6	67.5	55.8	126.3	391.3
McKean	18.2	34.1	26.6	27.2	68.4	174.7
Potter	5.0	7.5	6.0	5.7	11.2	35.4
Tioga	23.2	41.1	33.7	32.8	60.2	190.9
Warren	9.3	34.7	27.1	28.8	73.9	173.8
Region Total	\$188.0	\$368.4	\$294.2	\$278.8	\$592.9	\$1,722.4

Pennsylvania Wilds – Tourism Satellite Account, 2015

PENNSYLVANIA WILDS TOURISM SATELLITE ACCOUNT CATEGORIES, 2015 (dollar amounts in millions)				
2015	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Cameron	\$9.7	\$0.0	\$0.5	\$10.3
Clarion	117.7	0.3	6.2	124.1
Clearfield	270.0	0.7	14.2	284.9
Clinton	147.7	0.3	7.8	155.7
Elk	74.7	0.2	3.9	78.7
Forest	27.0	0.1	1.4	28.5
Jefferson	119.1	0.2	6.3	125.6
Lycoming	382.5	1.0	20.1	403.5
McKean	174.7	0.3	9.2	184.2
Potter	38.8	0.1	2.0	40.9
Tioga	195.2	0.5	10.3	205.9
Warren	178.6	0.2	9.4	188.2
Region Total	\$1,735.7	\$3.8	\$91.1	\$1,830.7
% Change	0.8%	2.3%	2.7%	0.9%

*Non-Traveler Personal Consumption Expenditures represent travel-related consumer durable purchases, such as an RV, boat, or furniture for a vacation home.

Pennsylvania Wilds – Tourism Satellite Account, 2014

PENNSYLVANIA WILDS TOURISM SATELLITE ACCOUNT CATEGORIES, 2014 (dollar amounts in millions)				
2014	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Cameron	\$9.4	\$0.0	\$0.5	\$9.9
Clarion	115.4	0.3	5.9	121.6
Clearfield	276.5	0.7	14.2	291.5
Clinton	147.5	0.3	7.6	155.4
Elk	69.3	0.1	3.6	73.0
Forest	23.2	0.1	1.2	24.4
Jefferson	115.1	0.2	5.9	121.2
Lycoming	391.3	0.9	20.1	412.3
McKean	174.7	0.3	9.0	184.0
Potter	35.4	0.1	1.8	37.3
Tioga	190.9	0.4	9.8	201.2
Warren	173.8	0.2	8.9	183.0
Region Total	\$1,722.4	\$3.7	\$88.7	\$1,814.8

*Non-Traveler Personal Consumption Expenditures represent travel-related consumer durable purchases, such as an RV, boat, or furniture for a vacation home.

Pennsylvania Wilds –Travel Industry Impacts, 2015

PENNSYLVANIA WILDS TRAVEL INDUSTRY IMPACTS, 2015 (dollar amounts in millions)

2015	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Cameron	\$9.7	76	\$1.5	\$0.5	\$0.4
Clarion	117.7	1,071	24.6	6.3	5.6
Clearfield	270.0	1,799	49.5	13.9	12.0
Clinton	147.7	1,064	28.8	7.7	6.8
Elk	74.7	573	12.2	3.7	3.1
Forest	27.0	138	3.7	1.3	1.0
Jefferson	119.1	821	23.9	6.2	5.6
Lycoming	382.5	2,952	79.6	20.6	18.3
McKean	174.7	1,164	31.5	8.9	7.7
Potter	38.8	246	5.9	1.9	1.6
Tioga	195.2	1,573	40.4	10.5	9.3
Warren	178.6	1,156	27.5	8.5	7.2
Region Total	\$1,735.7	12,632	\$329.1	\$89.9	\$78.7
% Change	0.8%	0.9%	3.2%	0.3%	2.2%

Pennsylvania Wilds –Travel Industry Impacts, 2014

PENNSYLVANIA WILDS TRAVEL INDUSTRY IMPACTS, 2014 (dollar amounts in millions)

2014	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Cameron	\$9.4	76	\$1.5	\$0.5	\$0.4
Clarion	115.4	1,051	23.6	6.2	5.5
Clearfield	276.5	1,817	48.6	14.3	12.0
Clinton	147.5	1,045	28.0	7.7	6.7
Elk	69.3	557	11.5	3.5	2.9
Forest	23.2	138	3.7	1.2	1.0
Jefferson	115.1	807	22.5	6.1	5.3
Lycoming	391.3	2,961	79.0	21.1	18.4
McKean	174.7	1,144	29.8	8.8	7.5
Potter	35.4	242	5.8	1.8	1.5
Tioga	190.9	1,535	38.3	10.3	8.9
Warren	173.8	1,147	26.5	8.4	7.0
Region Total	\$1,722.4	12,519	\$318.9	\$89.7	\$77.0

Pennsylvania Wilds –Travel Economy Impacts, 2015

PENNSYLVANIA WILDS TRAVEL ECONOMY IMPACTS, 2015 (dollar amounts in millions)

2015	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Cameron	\$10.3	131	\$3.7	\$0.8	\$0.8
Clarion	124.1	1,686	50.9	11.1	11.4
Clearfield	284.9	2,923	101.7	24.4	24.2
Clinton	155.7	1,678	57.3	13.6	13.7
Elk	78.7	944	27.5	6.5	6.3
Forest	28.5	234	8.1	2.3	2.1
Jefferson	125.6	1,394	50.8	11.0	11.2
Lycoming	403.5	4,630	157.4	36.1	36.9
McKean	184.2	1,812	61.6	15.6	15.5
Potter	40.9	419	13.4	3.3	3.1
Tioga	205.9	2,343	75.6	18.4	18.8
Warren	188.2	1,836	57.0	15.0	14.5
Region Total	\$1,830.7	20,030	\$665.2	\$157.9	\$158.4
% Change	0.9%	2.0%	2.3%	0.2%	2.2%

Pennsylvania Wilds –Travel Economy Impacts, 2014

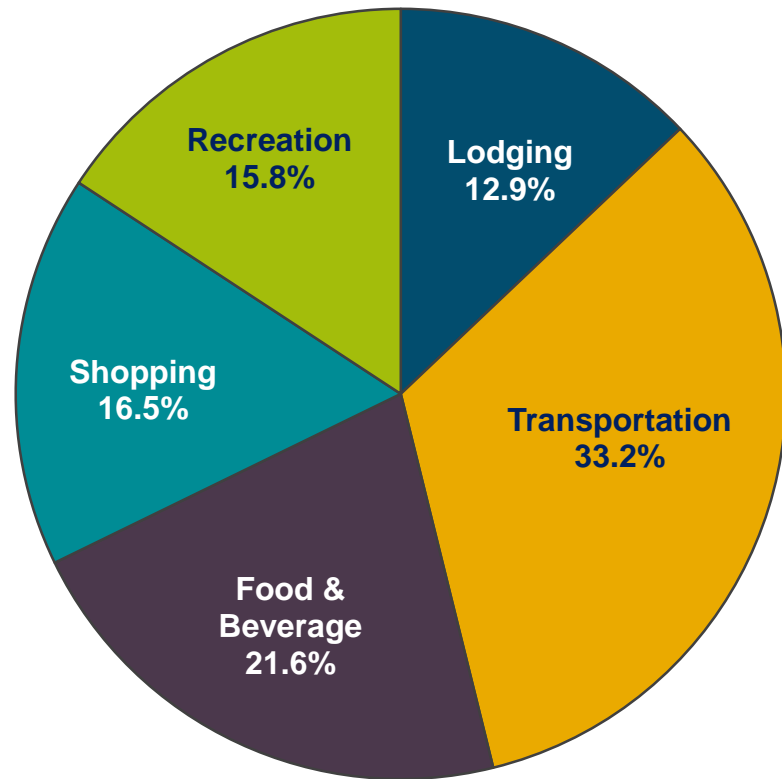
PENNSYLVANIA WILDS TRAVEL ECONOMY IMPACTS, 2014 (dollar amounts in millions)

2014	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Cameron	\$9.9	129	\$3.7	\$0.8	\$0.8
Clarion	121.6	1,640	49.4	11.0	11.0
Clearfield	291.5	2,908	100.3	25.0	24.2
Clinton	155.4	1,634	56.1	13.6	13.5
Elk	73.0	911	26.6	6.1	5.9
Forest	24.4	231	8.1	2.0	1.9
Jefferson	121.2	1,356	48.8	10.7	10.7
Lycoming	412.3	4,588	156.4	37.0	37.0
McKean	184.0	1,765	59.1	15.5	15.0
Potter	37.3	408	13.3	3.1	3.0
Tioga	201.2	2,274	72.5	18.0	18.0
Warren	183.0	1,802	55.6	14.8	14.1
Region Total	\$1,814.8	19,646	\$649.9	\$157.7	\$155.0

The Alleghenies

- The Alleghenies is comprised of the following counties: Bedford, Blair, Cambria, Centre, Fulton, Huntingdon, Juniata, and Mifflin.
- Travelers spent well over \$1.9 billion in The Alleghenies region in 2015 – a 2.3% increase from 2014.
- As in 2013 and 2014, visitors to the region continued to spend a relatively high percentage of their trip dollars on transportation – ranking third among the state’s tourism regions in the share of dollars spent on this category, and far less on retail and recreation purchases with rankings of 9th and 10th, respectively.

The Alleghenies Region 2015 Spending by Category

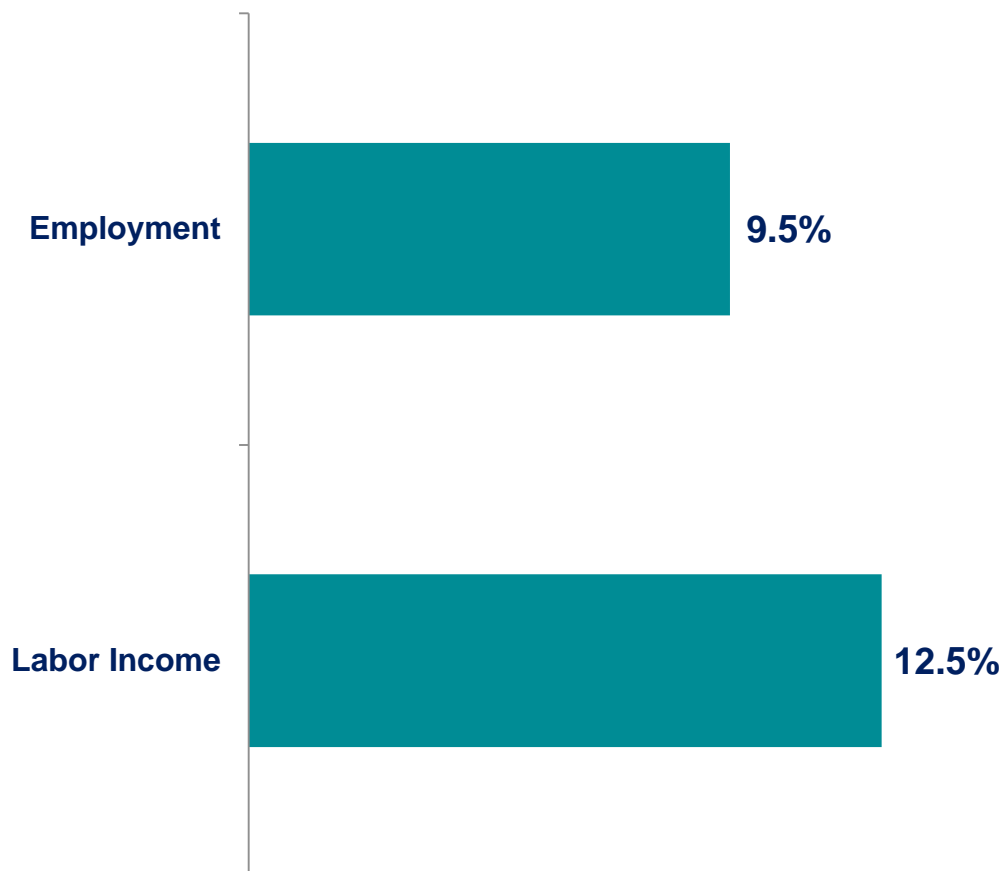


Source: Tourism Economics

The Alleghenies

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- The travel industry was responsible for 12.5% of the labor income earned in The Alleghenies region in 2015 – the second highest share of the stat's tourism regions and well above the region's travel industry employment share of 9.3%, which was unchanged from 2014.
- The region continued to rank 6th among the state's tourism regions in the share of travel-supported jobs relative to the region's total employment.

Travel Industry Share of Regional Economy



The Alleghenies – Traveler Spending & Employment Timelines

THE ALLEGHENIES TRAVELER SPENDING, 2005 – 2015

County	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Bedford	\$244.2	\$243.5	\$259.6	\$286.0	\$239.0	\$263.0	\$274.7	\$280.2	\$282.9	\$283.9	\$284.9
Blair	257.8	260.4	278.1	296.8	249.3	271.2	295.3	307.4	309.6	312.9	324.9
Cambria	235.2	232.3	244.3	280.9	238.5	257.6	290.5	303.4	301.0	302.9	308.1
Centre	498.7	511.2	531.4	616.4	545.6	588.7	649.3	654.3	694.1	720.2	741.8
Fulton	18.8	19.2	20.4	22.4	17.4	19.3	21.7	23.7	23.5	23.2	23.3
Huntingdon	129.5	125.7	135.3	146.6	129.1	144.1	153.1	162.8	161.7	160.4	163.9
Juniata	28.0	28.6	30.3	33.4	28.5	31.0	34.8	36.3	36.8	36.5	37.2
Mifflin	57.6	58.4	60.8	67.0	54.4	58.9	62.8	63.5	64.9	65.2	65.2
Region Total	\$1,469.8	\$1,479.2	\$1,560.1	\$1,749.6	\$1,501.9	\$1,633.9	\$1,782.3	\$1,831.6	\$1,874.4	\$1,905.2	\$1,949.2
% Change	---	0.6%	5.5%	12.1%	-14.2%	8.8%	9.1%	2.8%	2.3%	1.6%	2.3%

THE ALLEGHENIES TRAVEL INDUSTRY EMPLOYMENT, 2005 – 2015

County	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Bedford	1,993	2,044	2,113	2,151	1,977	2,026	2,015	1,967	1,978	2,004	2,042
Blair	2,389	2,449	2,512	2,582	2,446	2,499	2,544	2,554	2,609	2,588	2,665
Cambria	2,190	2,173	2,155	2,109	2,021	2,005	2,021	2,064	2,053	2,042	2,025
Centre	4,701	4,635	4,657	4,782	4,641	4,705	4,765	4,835	4,923	4,875	4,935
Fulton	146	148	152	154	143	152	152	154	155	156	158
Huntingdon	1,168	1,209	1,224	1,244	1,221	1,273	1,308	1,292	1,329	1,335	1,356
Juniata	237	240	247	251	239	218	219	222	223	224	226
Mifflin	577	588	599	610	567	583	589	598	605	608	618
Region Total	13,400	13,486	13,658	13,883	13,254	13,460	13,614	13,687	13,876	13,833	14,024
% Change	---	0.6%	1.3%	1.6%	-4.5%	1.6%	1.1%	0.5%	1.4%	-0.3%	1.4%

The Alleghenies – Traveler Spending by Category

THE ALLEGHENIES TRAVELER SPENDING BY CATEGORY, 2014 and 2015 (dollar amounts in millions)

2015	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Bedford	\$43.1	\$57.1	\$43.6	\$44.7	\$96.4	\$284.9
Blair	31.7	68.5	54.0	51.8	119.0	324.9
Cambria	24.2	61.4	49.1	49.5	123.9	308.1
Centre	128.8	167.5	124.7	109.5	211.3	741.8
Fulton	2.1	4.9	4.1	4.4	7.9	23.3
Huntingdon	14.3	36.6	27.2	30.7	55.2	163.9
Juniata	1.8	8.4	6.3	7.8	12.9	37.2
Mifflin	5.9	17.3	12.0	8.9	21.1	65.2
Region Total	\$251.8	\$421.7	\$320.9	\$307.2	\$647.6	\$1,949.2
% Change	2.6%	3.8%	0.9%	4.2%	1.0%	2.3%

2014	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Bedford	\$42.6	\$55.4	\$43.5	\$43.9	\$98.6	\$283.9
Blair	30.6	65.4	54.4	49.0	113.6	312.9
Cambria	23.8	59.6	48.3	47.9	123.2	302.9
Centre	125.1	160.3	122.3	103.9	208.6	720.2
Fulton	2.0	4.8	4.1	4.6	7.8	23.2
Huntingdon	13.4	35.5	27.1	29.7	54.7	160.4
Juniata	1.9	8.2	6.2	7.3	13.0	36.5
Mifflin	6.0	17.0	12.1	8.6	21.5	65.2
Region Total	\$245.4	\$406.1	\$317.9	\$294.8	\$641.0	\$1,905.2

The Alleghenies – Tourism Satellite Account

THE ALLEGHENIES TOURISM SATELLITE ACCOUNT CATEGORIES, 2014 and 2015 (dollar amounts in millions)				
2015	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Bedford	\$284.9	\$0.6	\$15.0	\$300.4
Blair	324.9	0.7	17.1	342.7
Cambria	308.1	0.6	16.2	324.8
Centre	741.8	2.2	38.9	783.0
Fulton	23.3	0.0	1.2	24.6
Huntingdon	163.9	0.3	8.6	172.8
Juniata	37.2	0.0	2.0	39.2
Mifflin	65.2	0.1	3.4	68.7
Region Total	\$1,949.2	\$4.5	\$102.3	\$2,056.1
% Change	2.3%	3.7%	4.3%	2.4%

2014	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Bedford	\$283.9	\$0.6	\$14.6	\$299.1
Blair	312.9	0.7	16.1	329.7
Cambria	302.9	0.5	15.6	319.0
Centre	720.2	2.1	37.1	759.4
Fulton	23.2	0.0	1.2	24.5
Huntingdon	160.4	0.3	8.3	168.9
Juniata	36.5	0.0	1.9	38.5
Mifflin	65.2	0.1	3.4	68.7
Region Total	\$1,905.2	\$4.4	\$98.1	\$2,007.7

*Non-Traveler Personal Consumption Expenditures represent travel-related consumer durable purchases, such as an RV, boat, or furniture for a vacation home.

The Alleghenies –Travel Industry Impacts, 2014 & 2015

THE ALLEGHENIES TRAVEL INDUSTRY IMPACTS, 2014 and 2015 (dollar amounts in millions)

2015	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Bedford	\$284.9	2,042	\$56.6	\$15.0	\$13.3
Blair	324.9	2,665	76.3	18.2	16.7
Cambria	308.1	2,025	68.1	16.7	15.3
Centre	741.8	4,935	148.0	39.7	34.6
Fulton	23.3	158	3.7	1.1	1.0
Huntingdon	163.9	1,356	34.8	8.8	7.9
Juniata	37.2	226	5.0	1.7	1.4
Mifflin	65.2	618	14.4	3.5	3.2
Region Total	\$1,949.2	14,024	\$407.0	\$104.7	\$93.5
% Change	2.3%	1.4%	4.5%	1.7%	3.6%

2014	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Bedford	\$283.9	2,004	\$53.9	\$14.9	\$12.9
Blair	312.9	2,588	71.9	17.7	15.9
Cambria	302.9	2,042	66.0	16.6	14.9
Centre	720.2	4,875	142.5	38.9	33.5
Fulton	23.2	156	3.7	1.1	1.0
Huntingdon	160.4	1,335	33.2	8.6	7.7
Juniata	36.5	224	4.7	1.7	1.4
Mifflin	65.2	608	13.8	3.5	3.2
Region Total	\$1,905.2	13,833	\$389.7	\$103.0	\$90.3

The Alleghenies –Travel Economy Impacts, 2014 & 2015

THE ALLEGHENIES
TRAVEL ECONOMY IMPACTS, 2014 and 2015
(dollar amounts in millions)

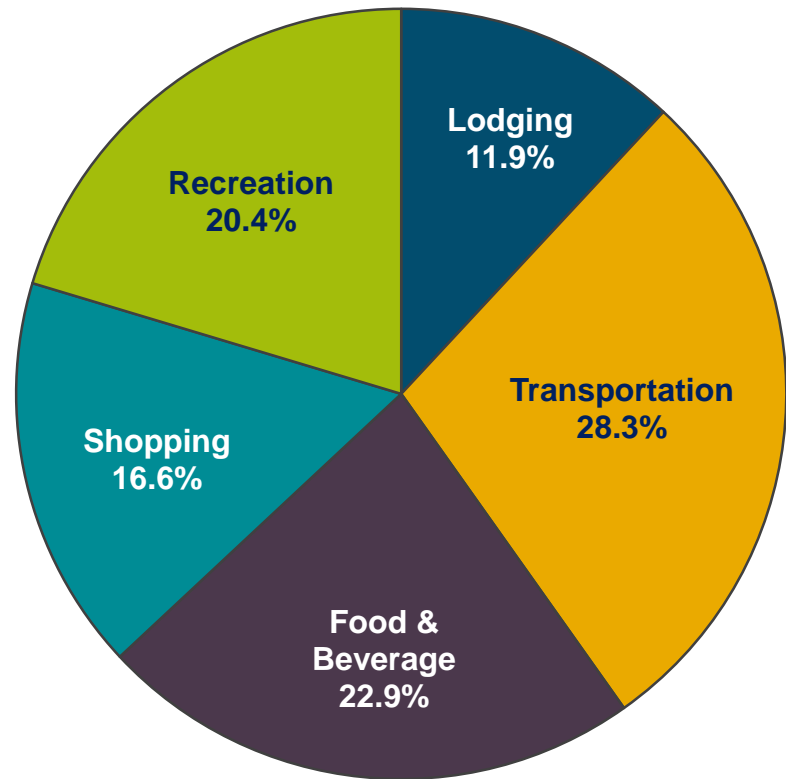
2015	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Bedford	\$300.4	3,034	\$104.0	\$26.3	\$26.7
Blair	342.7	4,246	151.6	32.1	33.8
Cambria	324.8	3,540	143.7	29.6	30.8
Centre	783.0	7,520	276.2	69.3	69.8
Fulton	24.6	292	9.5	2.0	1.9
Huntingdon	172.8	2,090	68.1	15.5	16.0
Juniata	39.2	463	15.1	3.0	2.8
Mifflin	68.7	1,087	34.5	6.3	6.5
Region Total	\$2,056.1	22,272	\$802.7	\$184.0	\$188.3
% Change	2.4%	2.3%	3.3%	1.5%	3.6%

2014	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Bedford	\$299.1	2,958	\$100.0	\$26.2	\$25.9
Blair	329.7	4,098	144.9	31.1	32.1
Cambria	319.0	3,507	140.6	29.4	30.0
Centre	759.4	7,365	267.9	68.1	67.4
Fulton	24.5	285	9.4	2.0	1.9
Huntingdon	168.9	2,041	65.7	15.2	15.4
Juniata	38.5	451	14.6	2.9	2.7
Mifflin	68.7	1,057	33.6	6.3	6.4
Region Total	\$2,007.7	21,761	\$776.8	\$181.2	\$181.8

Valleys of the Susquehanna

- The Valleys of the Susquehanna region is comprised of the following counties: Columbia, Montour, Northumberland, Snyder, and Union.
- Travelers spent nearly \$620 million in the region in 2015 – a small increase (0.4%) from 2014.
- As in prior years, the Valleys of the Susquehanna region continued to have the highest proportion of traveler dollars spent on food & beverages among the state's 11 tourism regions and the second highest share spent on recreation – with both categories posting relatively strong increases from 2014.

Valleys of the Susquehanna Region 2015 Spending by Category

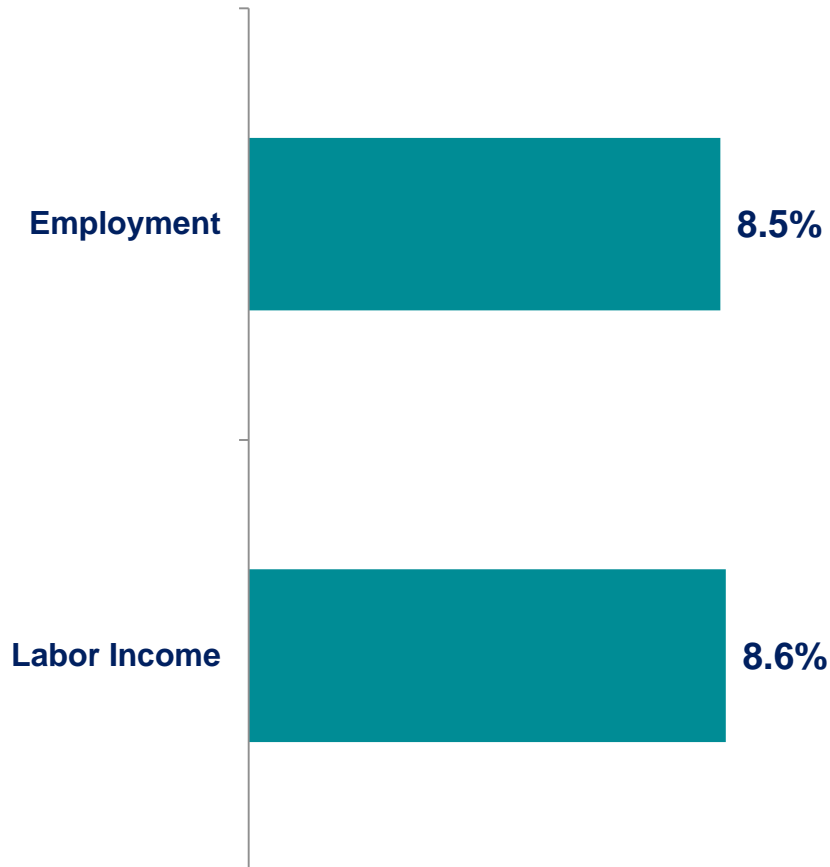


Source: Tourism Economics

Valleys of the Susquehanna

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- The travel industry was responsible for 8.6% of the region's labor income and 8.5% of the region's employment in 2015.
- The region continued to have the smallest number of travel-supported jobs among the state's 11 tourism, with the travel industry's employment share continuing to rank 8th among the regions and its travel-supported labor income share ranking 9th in 2015.

Travel Industry Share of Regional Economy



Valleys of the Susquehanna – Traveler Spending & Employment Timelines

VALLEYS OF THE SUSQUEHANNA TRAVELER SPENDING, 2005 – 2015 (dollar amounts in millions)

County	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Columbia	\$114.5	\$117.8	\$125.5	\$140.3	\$114.5	\$127.6	\$150.5	\$150.6	\$153.7	\$153.8	\$151.9
Montour	84.8	84.5	84.9	93.5	79.2	88.0	97.3	105.3	102.3	97.2	96.1
Northumberland	96.5	99.5	102.9	114.4	99.1	113.3	118.3	118.3	124.3	125.0	129.8
Snyder	79.8	81.0	84.3	90.3	74.9	83.5	90.6	90.2	95.3	98.8	99.3
Union	110.2	113.4	118.0	136.7	115.7	124.3	147.8	157.5	149.2	142.7	142.6
Region Total	\$485.7	\$496.1	\$515.6	\$575.2	\$483.3	\$536.6	\$604.6	\$622.0	\$624.7	\$617.5	\$619.8
% Change	---	2.1%	3.9%	11.6%	-16.0%	11.0%	12.7%	2.9%	0.4%	-1.2%	0.4%

VALLEYS OF THE SUSQUEHANNA TRAVEL INDUSTRY EMPLOYMENT, 2005 – 2015

County	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Columbia	1,082	1,111	1,147	1,163	1,141	1,171	1,217	1,258	1,291	1,290	1,292
Montour	861	865	863	850	800	823	839	863	884	889	902
Northumberland	953	984	980	997	943	988	1,013	1,050	1,066	1,078	1,101
Snyder	667	687	690	702	665	691	702	722	740	744	764
Union	1,040	1,063	1,098	1,116	1,098	1,126	1,152	1,188	1,224	1,229	1,216
Region Total	4,603	4,710	4,777	4,828	4,647	4,799	4,924	5,081	5,205	5,229	5,275
% Change	---	2.3%	1.4%	1.1%	-3.7%	3.3%	2.6%	3.2%	2.4%	0.5%	0.9%

Valleys of the Susquehanna – Traveler Spending by Category

VALLEYS OF THE SUSQUEHANNA TRAVELER SPENDING BY CATEGORY, 2014 and 2015 (dollar amounts in millions)

2015	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Columbia	\$20.3	\$38.0	\$24.8	\$25.8	\$42.9	\$151.9
Montour	14.7	20.4	15.1	18.9	27.0	96.1
Northumberland	4.2	23.2	16.4	41.6	44.4	129.8
Snyder	11.7	23.7	19.8	20.2	23.9	99.3
Union	23.0	36.3	26.7	19.7	36.9	142.6
Region Total	\$73.9	\$141.7	\$102.9	\$126.2	\$175.2	\$619.8
% Change	0.6%	2.9%	-1.6%	2.4%	-1.9%	0.4%

2014	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Columbia	\$20.7	\$37.2	\$26.0	\$26.0	\$43.9	\$153.8
Montour	14.7	20.0	15.4	19.2	27.9	97.2
Northumberland	4.3	22.7	16.5	36.9	44.7	125.0
Snyder	11.3	22.8	20.1	19.8	24.8	98.8
Union	22.5	35.1	26.6	21.4	37.2	142.7
Region Total	\$73.5	\$137.7	\$104.5	\$123.2	\$178.6	\$617.5

Valleys of the Susquehanna – Tourism Satellite Account

VALLEYS OF THE SUSQUEHANNA TOURISM SATELLITE ACCOUNT CATEGORIES, 2014 and 2015 (dollar amounts in millions)				
2015	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Columbia	\$151.9	\$0.4	\$8.0	\$160.3
Montour	96.1	0.3	5.0	101.5
Northumberland	129.8	0.1	6.8	136.8
Snyder	99.3	0.3	5.2	104.8
Union	142.6	0.5	7.5	150.6
Region Total	\$619.8	\$1.6	\$32.5	\$653.9
% Change	0.4%	3.2%	2.3%	0.5%

2014	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Columbia	\$153.8	\$0.4	\$7.9	\$162.1
Montour	97.2	0.3	5.0	102.5
Northumberland	125.0	0.1	6.4	131.5
Snyder	98.8	0.2	5.1	104.1
Union	142.7	0.4	7.4	150.5
Region Total	\$617.5	\$1.5	\$31.8	\$650.8

*Non-Traveler Personal Consumption Expenditures represent travel-related consumer durable purchases, such as an RV, boat, or furniture for a vacation home.

Valleys of the Susquehanna – Travel Industry Impacts, 2014 & 2015

VALLEYS OF THE SUSQUEHANNA TRAVEL INDUSTRY IMPACTS, 2014 and 2015 (dollar amounts in millions)

2015	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Columbia	\$151.9	1,292	\$30.3	\$8.1	\$7.1
Montour	96.1	902	22.3	5.5	4.9
Northumberland	129.8	1,101	31.7	7.2	6.9
Snyder	99.3	764	16.7	5.0	4.2
Union	142.6	1,216	30.5	7.9	6.9
Region Total	\$619.8	5,275	\$131.5	\$33.6	\$30.0
% Change	0.4%	0.9%	4.5%	0.5%	2.9%

2014	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Columbia	\$153.8	1,290	\$29.2	\$8.2	\$7.0
Montour	97.2	889	21.0	5.4	4.8
Northumberland	125.0	1,078	29.5	7.0	6.5
Snyder	98.8	744	16.0	4.9	4.1
Union	142.7	1,229	30.1	7.9	6.9
Region Total	\$617.5	5,229	\$125.8	\$33.4	\$29.2

Valleys of the Susquehanna – Travel Economy Impacts, 2014 & 2015

VALLEYS OF THE SUSQUEHANNA TRAVEL ECONOMY IMPACTS, 2014 and 2015 (dollar amounts in millions)

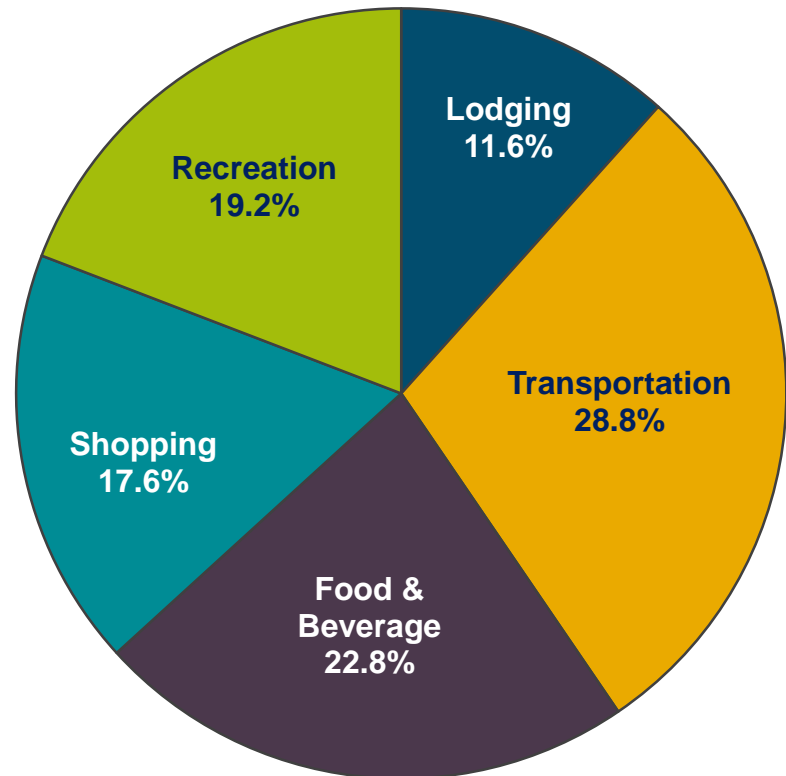
2015	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Columbia	\$160.3	2,097	\$65.0	\$14.2	\$14.3
Montour	101.5	1,315	40.9	9.6	9.9
Northumberland	136.8	1,970	72.0	12.8	13.8
Snyder	104.8	1,249	37.0	8.7	8.5
Union	150.6	1,887	60.5	13.7	14.0
Region Total	\$653.9	8,518	\$275.3	\$59.0	\$60.5
% Change	0.5%	2.0%	3.2%	0.4%	2.9%

2014	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Columbia	\$162.1	2,067	\$63.4	\$14.3	\$14.0
Montour	102.5	1,287	38.9	9.5	9.6
Northumberland	131.5	1,908	68.7	12.4	13.0
Snyder	104.1	1,208	35.9	8.7	8.2
Union	150.5	1,882	59.9	13.8	13.9
Region Total	\$650.8	8,351	\$266.8	\$58.7	\$58.8

Upstate PA

- The Upstate PA region is comprised of the following counties: Bradford, Lackawanna, Luzerne, Schuylkill, Sullivan, Susquehanna, and Wyoming.
- Travelers spent close to \$2.2 billion in the Upstate PA region in 2015 – a 0.8% decrease and just below 2014's record high.
- As in prior years, the Upstate PA region continued to have the second highest share of spending by travelers on food & beverage purchases among the state's 11 tourism regions in 2015.

Upstate PA Region 2015 Spending by Category

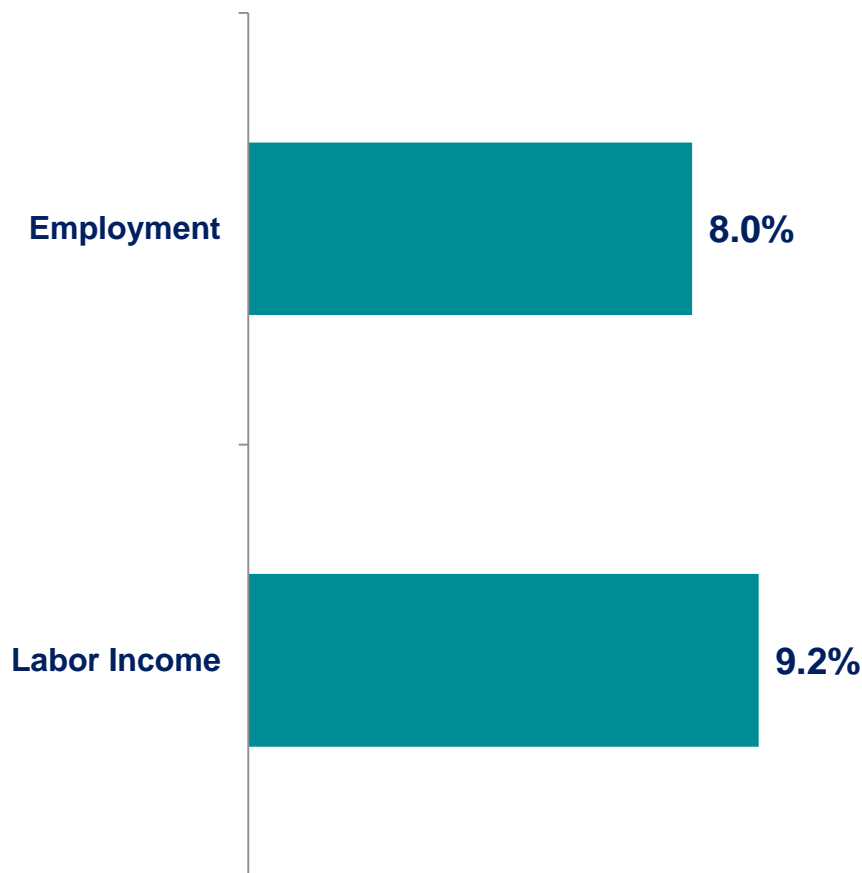


Source: Tourism Economics

Upstate PA

- The chart shows the travel economy's share (including indirect and induced impacts) of the regional total for both labor income and employment.
- The travel-related labor income share for the Upstate PA region was 9.2% in 2015, well above the region's 8.0% employment share.
- As in the previous three years, the travel industry's share of the region's employment was the second lowest of the state's 11 tourism regions, while the region continued to rank 5th in the actual number of jobs supported by travel.

Travel Industry Share of Regional Economy



Upstate PA – Traveler Spending & Employment Timelines

UPSTATE PA TRAVELER SPENDING, 2005 – 2015 (dollar amounts in millions)

County	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Bradford	\$125.2	\$126.4	\$134.7	\$148.3	\$136.3	\$170.0	\$200.5	\$225.3	\$223.1	\$227.6	\$211.8
Lackawanna	478.4	482.8	514.4	566.5	483.1	536.5	615.5	632.1	648.4	633.3	618.4
Luzerne	674.5	702.6	752.5	818.6	708.3	795.5	870.3	870.2	859.9	875.1	889.7
Schuylkill	164.3	168.8	177.5	195.2	158.5	159.2	176.8	195.7	196.3	198.9	206.2
Sullivan	12.7	12.3	12.9	14.4	13.1	16.0	18.7	19.7	19.1	18.6	17.6
Susquehanna	107.5	112.6	121.5	140.4	122.7	141.6	151.8	164.3	163.1	161.7	157.1
Wyoming	33.2	35.3	37.0	40.3	36.8	41.3	53.1	61.2	64.1	63.5	61.2
Region Total	\$1,596.0	\$1,640.7	\$1,750.4	\$1,923.7	\$1,658.6	\$1,860.2	\$2,086.6	\$2,168.5	\$2,174.1	\$2,178.6	\$2,161.8
% Change	---	2.8%	6.7%	9.9%	-13.8%	12.2%	12.2%	3.9%	0.3%	0.2%	-0.8%

UPSTATE PA TRAVEL INDUSTRY EMPLOYMENT, 2005 – 2015

County	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Bradford	1,017	1,014	1,011	1,031	1,037	1,252	1,326	1,333	1,402	1,410	1,408
Lackawanna	4,537	4,626	4,769	4,855	4,563	4,752	4,882	5,006	5,131	5,183	5,117
Luzerne	5,789	6,028	6,142	6,253	5,978	6,275	6,534	6,619	6,754	7,056	7,068
Schuylkill	1,207	1,215	1,254	1,287	1,187	1,165	1,177	1,203	1,219	1,225	1,221
Sullivan	109	111	116	118	117	138	148	160	173	174	167
Susquehanna	1,022	1,053	1,059	1,044	1,002	1,024	1,061	1,060	1,105	1,110	1,096
Wyoming	349	351	359	364	365	362	379	400	421	423	417
Region Total	14,030	14,399	14,709	14,952	14,250	14,967	15,507	15,781	16,205	16,580	16,494
% Change	---	2.6%	2.2%	1.7%	-4.7%	5.0%	3.6%	1.8%	2.7%	2.3%	-0.5%

Upstate PA – Traveler Spending by Category, 2014 & 2015

UPSTATE PA TRAVELER SPENDING BY CATEGORY, 2014 and 2015 (dollar amounts in millions)

2015	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Bradford	\$22.5	\$46.5	\$33.1	\$35.1	\$74.6	\$211.8
Lackawanna	77.9	146.0	124.5	109.9	160.1	618.4
Luzerne	110.5	199.8	149.5	193.0	236.9	889.7
Schuykill	18.4	50.1	35.2	32.7	69.8	206.2
Sullivan	1.8	2.9	2.3	5.5	5.0	17.6
Susquehanna	11.7	33.5	24.3	28.3	59.3	157.1
Wyoming	8.6	13.5	11.4	10.0	17.6	61.2
Region Total	\$251.5	\$492.2	\$380.3	\$414.5	\$623.4	\$2,161.8
% Change	-1.4%	1.8%	-1.0%	1.4%	-3.7%	-0.8%

2014	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Bradford	\$26.4	\$48.2	\$35.5	\$37.2	\$80.3	\$227.6
Lackawanna	81.8	145.6	127.7	110.4	167.7	633.3
Luzerne	105.7	191.0	147.3	185.8	245.4	875.1
Schuykill	17.4	47.9	34.2	31.3	68.2	198.9
Sullivan	2.2	3.1	2.6	5.4	5.3	18.6
Susquehanna	12.5	33.7	25.1	28.9	61.5	161.7
Wyoming	9.0	13.8	11.8	10.0	18.8	63.5
Region Total	\$255.0	\$483.3	\$384.2	\$408.9	\$647.2	\$2,178.6

Upstate PA – Tourism Satellite Account

UPSTATE PA TOURISM SATELLITE ACCOUNT CATEGORIES, 2014 and 2015 (dollar amounts in millions)				
2015	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Bradford	\$211.8	\$0.4	\$11.1	\$223.3
Lackawanna	618.4	3.2	32.5	654.1
Luzerne	889.7	3.2	46.7	939.5
Schuylkill	206.2	0.4	10.8	217.4
Sullivan	17.6	0.0	0.9	18.5
Susquehanna	157.1	0.2	8.2	165.6
Wyoming	61.2	0.2	3.2	64.6
Region Total	\$2,161.8	\$7.7	\$113.5	\$2,283.0
% Change	-0.8%	-1.5%	1.2%	-0.7%

2014	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Bradford	\$227.6	\$0.6	\$11.7	\$239.9
Lackawanna	633.3	3.3	32.6	669.2
Luzerne	875.1	3.0	45.1	923.2
Schuylkill	198.9	0.3	10.2	209.5
Sullivan	18.6	0.0	1.0	19.6
Susquehanna	161.7	0.3	8.3	170.2
Wyoming	63.5	0.2	3.3	67.0
Region Total	\$2,178.6	\$7.8	\$112.2	\$2,298.6

*Non-Traveler Personal Consumption Expenditures represent travel-related consumer durable purchases, such as an RV, boat, or furniture for a vacation home.

Upstate PA –Travel Industry Impacts, 2014 & 2015

UPSTATE PA TRAVEL INDUSTRY IMPACTS, 2014 and 2015 (dollar amounts in millions)

2015	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Bradford	\$211.8	1,408	\$35.8	\$10.5	\$9.0
Lackawanna	618.4	5,117	126.6	34.8	29.3
Luzerne	889.7	7,068	236.2	53.6	49.6
Schuykill	206.2	1,221	42.4	10.9	9.8
Sullivan	17.6	167	3.5	0.9	0.8
Susquehanna	157.1	1,096	24.6	7.5	6.4
Wyoming	61.2	417	10.8	3.2	2.7
Region Total	\$2,161.8	16,494	\$479.8	\$121.5	\$107.6
% Change	-0.8%	-0.5%	2.0%	-1.3%	0.9%

2014	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Bradford	\$227.6	1,410	\$34.9	\$11.2	\$9.2
Lackawanna	633.3	5,183	124.5	35.6	29.3
Luzerne	875.1	7,056	232.0	53.5	48.7
Schuykill	198.9	1,225	40.5	10.6	9.4
Sullivan	18.6	174	3.6	1.0	0.9
Susquehanna	161.7	1,110	24.1	7.8	6.4
Wyoming	63.5	423	11.0	3.3	2.7
Region Total	\$2,178.6	16,580	\$470.6	\$123.0	\$106.6

Upstate PA –Travel Economy Impacts, 2014 & 2015

UPSTATE PA TRAVEL ECONOMY IMPACTS, 2014 and 2015 (dollar amounts in millions)

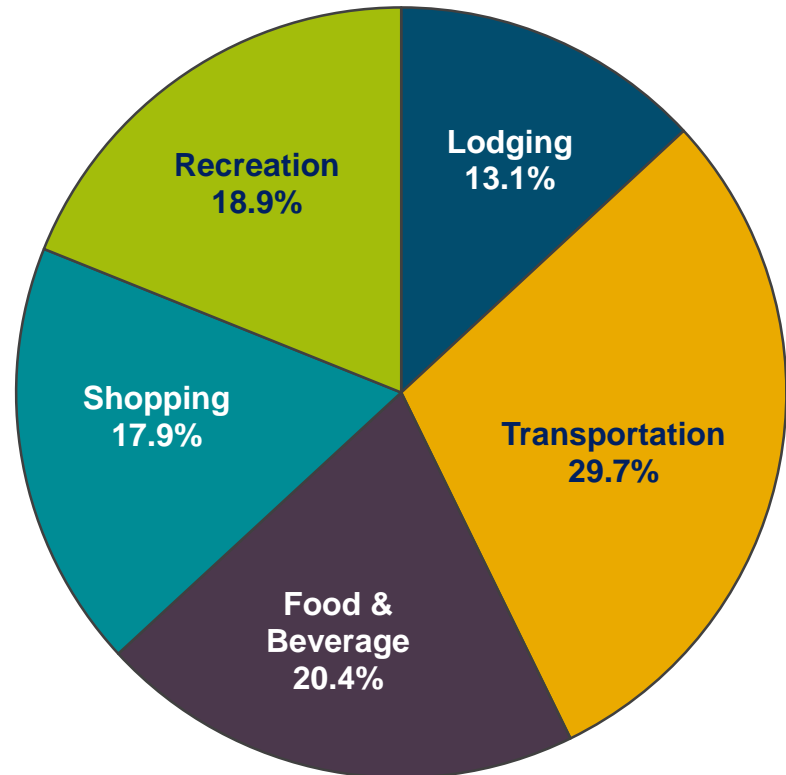
2015	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Bradford	\$223.3	2,245	\$73.4	\$18.5	\$18.1
Lackawanna	654.1	8,065	257.3	59.7	59.0
Luzerne	939.5	11,300	454.4	93.7	100.0
Schuylkill	217.4	2,446	101.8	19.3	19.7
Sullivan	18.5	253	6.9	1.6	1.6
Susquehanna	165.6	1,739	51.8	13.3	12.9
Wyoming	64.6	705	23.6	5.5	5.4
Region Total	\$2,283.0	26,752	\$969.3	\$211.6	\$216.8
% Change	-0.7%	0.9%	1.4%	-1.3%	0.9%

2014	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Bradford	\$239.9	2,220	\$72.0	\$19.6	\$18.4
Lackawanna	669.2	8,054	254.3	61.2	59.0
Luzerne	923.2	11,145	448.3	93.6	98.3
Schuylkill	209.5	2,402	98.9	18.8	18.9
Sullivan	19.6	258	7.2	1.7	1.7
Susquehanna	170.2	1,736	51.0	13.7	12.9
Wyoming	67.0	702	24.0	5.8	5.5
Region Total	\$2,298.6	26,516	\$955.6	\$214.4	\$214.8

Pocono Mountains

- The Pocono Mountains region is comprised of the following counties: Carbon, Monroe, Pike, and Wayne.
- Travelers spent over \$3.2 billion in the Pocono Mountains region in 2015 – the fourth highest of the state’s 11 tourism regions. The region’s 8.2% growth rate from 2014 was the strongest rate of increase among the regions and the third highest amount of increase in dollar terms.
- The Pocono Mountains region had the highest proportion of traveler dollars spent on shopping and the fourth highest on lodging among the state’s 11 tourism regions in 2015.

**Pocono Mountains Region
2015 Spending by Category**

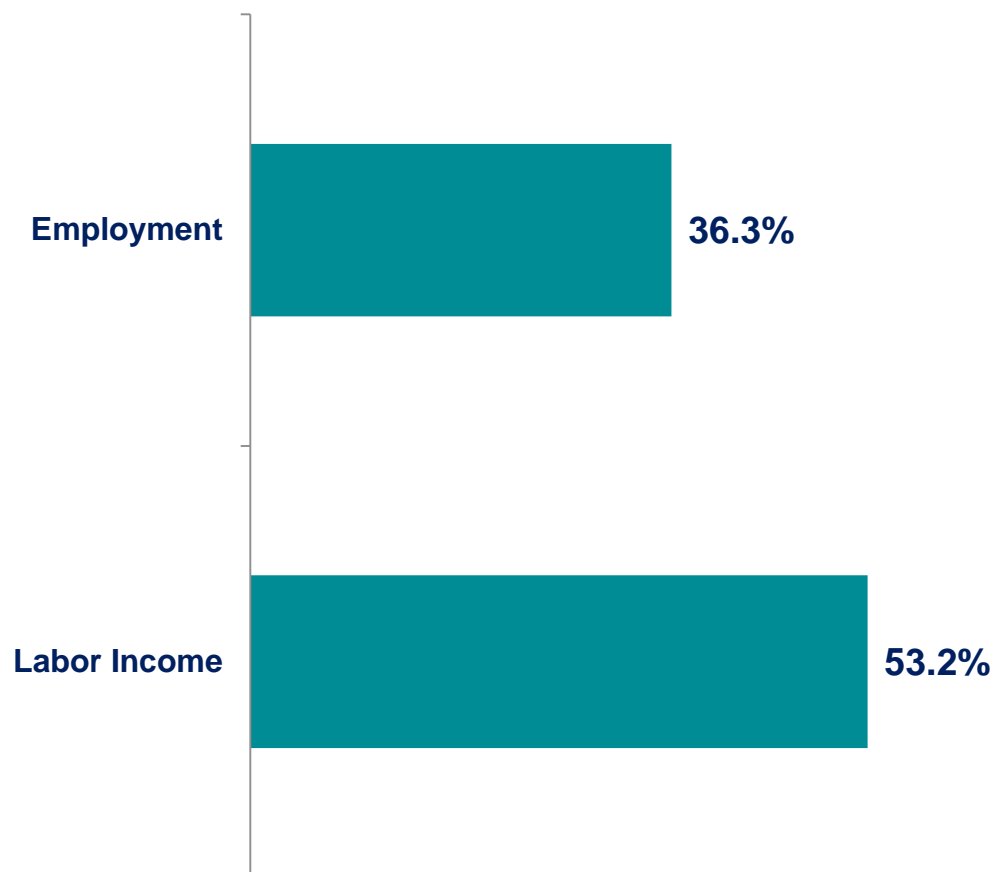


Source: Tourism Economics

Pocono Mountains

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- The region's share of travel-supported labor income topped 50% for the first time in 2015 – increasing to 53.2%, while the employment share grew to 36.3% of the region's economy.
- As in prior years, the Pocono Mountains region continued to have, by far, the highest proportion of labor income and employment supported by travel of the state's 11 tourism regions.

Travel Industry Share of Regional Economy



Pocono Mountains – Traveler Spending & Employment Timelines

POCONO MOUNTAINS TRAVEL INDUSTRY EMPLOYMENT, 2005 – 2015

County	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Carbon	2,819	2,775	2,816	2,792	2,766	2,717	2,733	2,638	2,693	2,722	2,759
Monroe	13,123	13,192	13,719	13,777	12,780	12,937	13,011	12,847	12,912	12,890	13,411
Pike	5,629	5,658	5,758	5,715	5,257	4,856	4,852	4,760	4,853	4,922	5,084
Wayne	3,072	3,170	3,157	3,212	3,151	3,107	3,120	3,143	3,120	3,049	3,103
Region Total	24,642	24,794	25,451	25,496	23,954	23,617	23,717	23,388	23,579	23,582	24,358
% Change	---	0.6%	2.6%	0.2%	-6.0%	-1.4%	0.4%	-1.4%	0.8%	0.0%	3.3%

POCONO MOUNTAINS TRAVELER SPENDING, 2005 – 2015 (dollar amounts in millions)

County	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Carbon	\$299.4	\$288.8	\$303.3	\$320.2	\$294.5	\$314.7	\$332.4	\$343.7	\$345.4	\$344.8	\$366.3
Monroe	1,371.4	1370.7	1,472.5	1,665.3	1,372.6	1,502.1	1,552.0	1,607.5	1,596.5	1,606.3	1,788.2
Pike	545.4	543.5	559.6	616.5	520.7	538.0	553.5	575.1	606.0	607.0	636.6
Wayne	371.4	382.6	409.3	437.6	400.4	422.4	432.7	429.5	424.2	419.7	433.1
Region Total	\$2,587.5	\$2,585.6	\$2,744.7	\$3,039.6	\$2,588.2	\$2,777.2	\$2,870.7	\$2,955.9	\$2,972.1	\$2,977.7	\$3,224.2
% Change	---	-0.1%	6.2%	10.7%	-14.9%	7.3%	3.4%	3.0%	0.5%	0.2%	8.3%

Pocono Mountains – Traveler Spending by Category

POCONO MOUNTAINS TRAVELER SPENDING BY CATEGORY, 2014 and 2015 (dollar amounts in millions)

2015	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Carbon	\$40.2	\$72.5	\$54.9	\$72.2	\$126.5	\$366.3
Monroe	259.8	355.3	349.6	354.9	468.5	1,788.2
Pike	77.9	136.2	103.3	106.1	213.2	636.6
Wayne	44.7	93.1	70.7	76.7	147.9	433.1
Region Total	\$422.6	\$657.1	\$578.5	\$610.0	\$956.0	\$3,224.2
% Change	18.7%	10.9%	7.6%	4.5%	5.3%	8.3%

2014	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Carbon	\$36.4	\$67.4	\$51.4	\$69.2	\$120.4	\$344.8
Monroe	204.4	306.7	317.2	338.0	440.0	1,606.3
Pike	71.5	128.7	99.4	102.4	204.9	607.0
Wayne	43.7	89.7	69.5	74.2	142.5	419.7
Region Total	\$356.1	\$592.5	\$537.5	\$583.8	\$907.8	\$2,977.7

Pocono Mountains – Tourism Satellite Account

POCONO MOUNTAINS TOURISM SATELLITE ACCOUNT CATEGORIES, 2014 and 2015 (dollar amounts in millions)

2015	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Carbon	\$366.3	\$0.7	\$19.2	\$386.2
Monroe	1,788.2	5.1	93.9	1,887.1
Pike	636.6	1.3	33.4	671.3
Wayne	433.1	0.6	22.7	456.5
Region Total	\$3,224.2	\$7.7	\$169.3	\$3,401.2
% Change	8.3%	19.8%	10.4%	8.4%

2014	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Carbon	\$344.8	\$0.6	\$17.8	\$363.1
Monroe	1,606.3	4.0	82.7	1,693.0
Pike	607.0	1.2	31.3	639.5
Wayne	419.7	0.6	21.6	441.9
Region Total	\$2,977.7	\$6.4	\$153.4	\$3,137.5

*Non-Traveler Personal Consumption Expenditures represent travel-related consumer durable purchases, such as an RV, boat, or furniture for a vacation home.

Pocono Mountains – Travel Industry Impacts, 2014 & 2015

POCONO MOUNTAINS TRAVEL INDUSTRY IMPACTS, 2014 and 2015 (dollar amounts in millions)

2015	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Carbon	\$366.3	2,759	\$66.6	\$18.6	\$16.2
Monroe	1,788.2	13,411	433.2	102.6	94.0
Pike	636.6	5,084	174.2	37.9	36.2
Wayne	433.1	3,103	98.8	23.7	21.9
Region Total	\$3,224.2	24,358	\$772.8	\$182.8	\$168.3
% Change	8.3%	3.3%	7.8%	6.8%	8.0%

2014	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Carbon	\$344.8	2,722	\$62.8	\$17.7	\$15.3
Monroe	1,606.3	12,890	400.8	94.2	86.0
Pike	607.0	4,922	159.5	36.1	33.6
Wayne	419.7	3,049	93.9	23.1	21.0
Region Total	\$2,977.7	23,582	\$717.0	\$171.1	\$155.9

Pocono Mountains – Travel Economy Impacts, 2014 & 2015

POCONO MOUNTAINS TRAVEL ECONOMY IMPACTS, 2014 and 2015 (dollar amounts in millions)

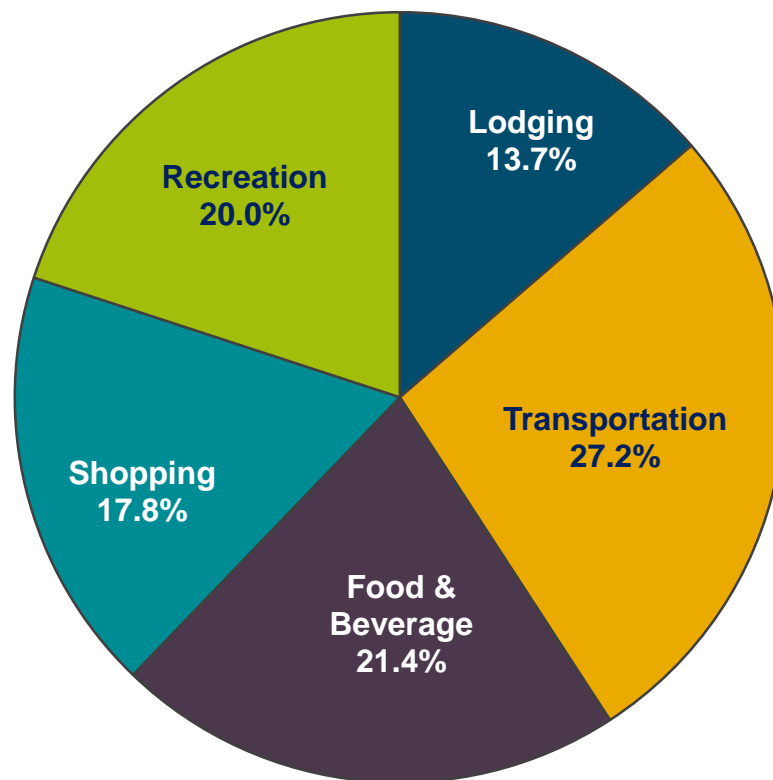
2015	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Carbon	\$386.2	4,091	\$125.3	\$32.7	\$32.6
Monroe	1,887.1	19,237	746.5	180.0	189.4
Pike	671.3	7,207	294.3	67.0	73.0
Wayne	456.5	4,605	177.1	41.9	44.2
Region Total	\$3,401.2	35,140	\$1,343.3	\$321.6	\$339.3
% Change	8.4%	3.7%	6.6%	6.5%	7.9%

2014	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Carbon	\$363.1	4,006	\$119.7	\$31.2	\$30.7
Monroe	1,693.0	18,424	697.8	165.9	173.5
Pike	639.5	6,948	272.3	63.8	67.8
Wayne	441.9	4,493	169.7	41.0	42.3
Region Total	\$3,137.5	33,871	\$1,259.6	\$301.9	\$314.3

Dutch Country Roads

- The Dutch Country Roads region is comprised of the following counties: Adams, Berks, Cumberland, Dauphin, Franklin, Lancaster, Lebanon, Perry, and York.
- Travelers spent nearly \$8.2 billion in the Dutch Country Roads region in 2015 – the second highest level among PA’s 11 tourism regions, a new record high, and a 2.4% increase from 2014.
- As in 2014, the Dutch Country Roads region had the second highest proportion of traveler dollars spent on shopping and the second lowest share on transportation, while ranking third in the percentage of traveler dollars allocated to both lodging and recreation of the state’s 11 tourism regions in 2015.

Dutch Country Roads Region 2015 Spending by Category

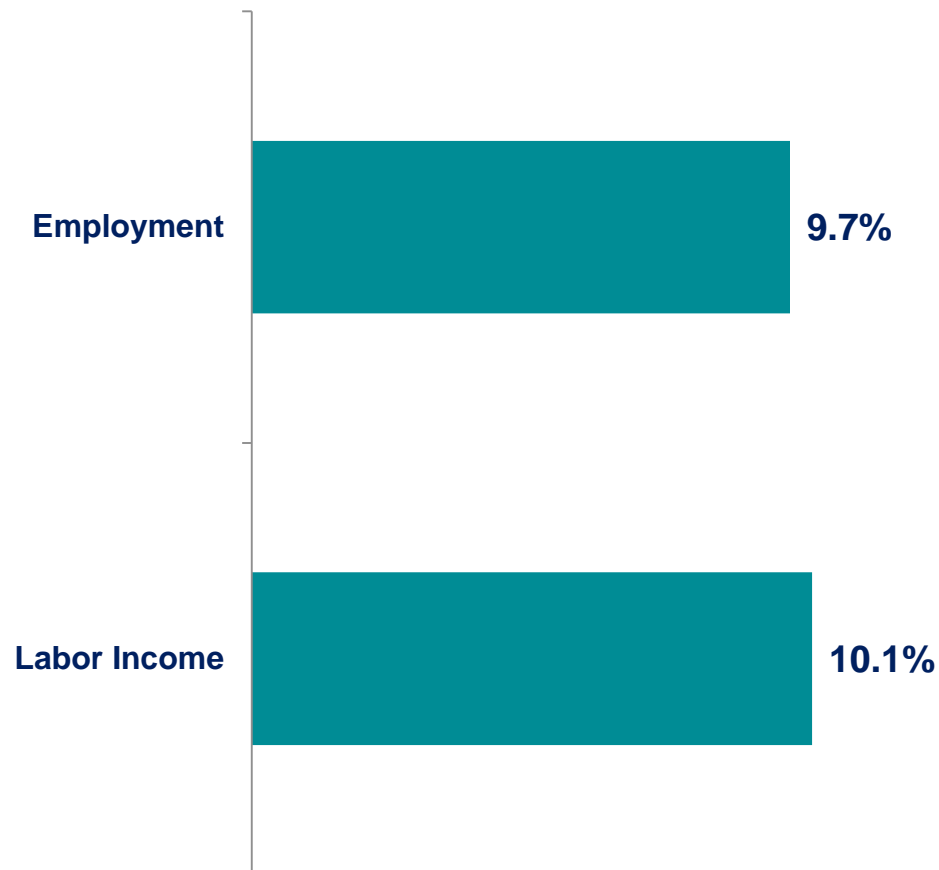


Source: Tourism Economics

Dutch Country Roads

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- The travel-supported labor income share for the Dutch Country Roads region rose to 10.1% in 2015 -- the 5th highest of PA's 11 tourism regions, while the employment share grew to 9.7%.
- The region continued to have the second highest number of jobs supported by the travel industry among the state's 11 tourism regions and to rank 4th in terms of the industry's share of regional employment in 2015.

Travel Industry Share of Regional Economy



Dutch Country Roads – Traveler Spending & Employment Timelines

DUTCH COUNTRY ROADS TRAVELER SPENDING, 2005 – 2015 (dollar amounts in millions)

County	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Adams	\$479.1	\$502.2	\$535.1	\$602.8	\$520.9	\$555.8	\$608.0	\$628.8	\$671.8	\$666.0	\$686.7
Berks	643.8	650.6	668.1	746.9	623.7	687.7	762.7	794.8	807.3	795.8	824.4
Cumberland	634.4	657.6	674.9	774.2	628.3	677.8	726.7	749.8	760.3	774.0	816.6
Dauphin	1,704.3	1,801.6	1,867.7	2,142.4	1,878.7	2,013.3	2,135.1	2,213.7	2,286.3	2,314.8	2,335.9
Franklin	248.3	259.6	280.8	322.2	270.2	286.5	298.0	314.8	323.4	324.3	326.7
Lancaster	1,436.6	1,464.4	1,498.0	1,706.5	1,523.1	1,669.7	1,792.7	1,817.5	1,854.9	1,919.9	1,975.4
Lebanon	152.4	154.8	158.9	182.2	159.9	170.9	185.6	192.6	193.9	200.9	201.4
Perry	43.0	42.9	44.2	48.6	40.6	43.6	48.7	46.8	46.9	47.4	47.9
York	720.2	741.2	764.3	829.2	706.5	753.5	850.2	885.1	907.5	923.0	943.7
Region Total	\$6,062.2	\$6,274.7	\$6,491.9	\$7,355.2	\$6,351.8	\$6,858.9	\$7,407.6	\$7,643.8	\$7,852.4	\$7,966.1	\$8,158.8
% Change	---	3.5%	3.5%	13.3%	-13.6%	8.0%	8.0%	3.2%	2.7%	1.4%	2.4%

DUTCH COUNTRY ROADS TRAVEL INDUSTRY EMPLOYMENT, 2005 – 2015

County	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Adams	4,739	4,830	4,972	5,063	4,835	4,771	4,788	4,866	5,080	5,074	5,105
Berks	6,098	6,182	6,401	6,490	6,067	6,173	6,238	6,468	6,577	6,564	6,622
Cumberland	6,121	6,280	6,327	6,408	5,909	5,812	5,935	6,068	6,152	6,215	6,239
Dauphin	17,406	17,769	18,141	18,282	17,583	17,735	17,887	18,533	18,724	18,709	18,846
Franklin	2,338	2,385	2,462	2,473	2,298	2,276	2,288	2,352	2,438	2,438	2,444
Lancaster	14,128	14,637	14,696	14,766	14,381	14,640	14,753	15,239	15,478	15,731	15,853
Lebanon	1,629	1,636	1,636	1,627	1,544	1,534	1,562	1,609	1,654	1,667	1,655
Perry	300	301	304	309	296	302	310	321	327	328	340
York	7,577	7,560	7,741	7,656	7,213	7,038	7,165	7,421	7,525	7,637	7,709
Region Total	60,336	61,580	62,680	63,074	60,127	60,281	60,927	62,877	63,955	64,363	64,814
% Change	---	2.1%	1.8%	0.6%	-4.7%	0.3%	1.1%	3.2%	1.7%	0.6%	0.7%

Dutch Country Roads – Traveler Spending by Category

DUTCH COUNTRY ROADS TRAVELER SPENDING BY CATEGORY, 2014 and 2015 (dollar amounts in millions)

2015	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Adams	\$91.4	\$139.7	\$127.7	\$159.6	\$168.3	\$686.7
Berks	85.2	187.3	155.2	143.6	253.1	824.4
Cumberland	119.5	192.5	142.6	135.3	226.7	816.6
Dauphin	375.9	448.1	359.1	558.5	594.3	2,335.9
Franklin	36.7	74.8	56.3	59.0	99.9	326.7
Lancaster	281.6	422.1	394.6	368.3	508.9	1,975.4
Lebanon	17.1	49.9	41.2	35.1	58.1	201.4
Perry	2.1	11.8	8.8	7.4	17.9	47.9
York	105.4	217.6	170.2	162.5	288.1	943.7
Region Total	\$1,114.9	\$1,743.7	\$1,455.5	\$1,629.4	\$2,215.3	\$8,158.8
% Change	5.0%	4.3%	1.5%	3.7%	-0.5%	2.4%

2014	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Adams	\$87.8	\$133.7	\$125.3	\$153.5	\$165.7	\$666.0
Berks	79.3	177.6	152.4	136.8	249.8	795.8
Cumberland	108.7	179.6	138.6	126.3	220.6	774.0
Dauphin	363.8	432.6	355.7	544.3	618.4	2,314.8
Franklin	34.7	71.3	55.8	57.2	105.4	324.3
Lancaster	265.8	408.1	385.6	355.0	505.4	1,919.9
Lebanon	17.2	48.4	41.1	34.1	60.2	200.9
Perry	2.0	11.2	8.8	7.1	18.2	47.4
York	102.1	209.3	170.5	157.5	283.6	923.0
Region Total	\$1,061.4	\$1,672.0	\$1,433.7	\$1,571.7	\$2,227.3	\$7,966.1

Dutch Country Roads – Tourism Satellite Account

DUTCH COUNTRY ROADS TOURISM SATELLITE ACCOUNT CATEGORIES, 2014 and 2015 (dollar amounts in millions)				
	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
2015				
Adams	\$686.7	\$2.7	\$36.1	\$725.5
Berks	824.4	2.6	43.3	870.3
Cumberland	816.6	2.3	42.9	861.7
Dauphin	2,335.9	12.1	122.6	2,470.6
Franklin	326.7	0.8	17.2	344.7
Lancaster	1,975.4	8.5	103.7	2,087.7
Lebanon	201.4	0.4	10.6	212.3
Perry	47.9	0.0	2.5	50.5
York	943.7	2.2	49.5	995.4
Region Total	\$8,158.8	\$31.6	\$428.4	\$8,618.8
% Change	2.4%	9.0%	4.4%	2.5%
2014				
Adams	\$666.0	\$1.5	\$34.3	\$701.8
Berks	795.8	2.1	41.0	838.9
Cumberland	774.0	2.1	39.9	816.0
Dauphin	2,314.8	11.8	119.2	2,445.8
Franklin	324.3	0.8	16.7	341.7
Lancaster	1,919.9	8.2	98.9	2,027.0
Lebanon	200.9	0.4	10.3	211.7
Perry	47.4	0.0	2.4	49.9
York	923.0	2.1	47.5	972.7
Region Total	\$7,966.1	\$29.0	\$410.3	\$8,405.3

*Non-Traveler Personal Consumption Expenditures represent travel-related consumer durable purchases, such as an RV, boat, or furniture for a vacation home.

Dutch Country Roads – Travel Industry Impacts, 2014 & 2015

DUTCH COUNTRY ROADS TRAVEL INDUSTRY IMPACTS, 2014 and 2015 (dollar amounts in millions)

2015	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Adams	\$686.7	5,105	\$144.4	\$38.1	\$33.1
Berks	824.4	6,622	195.2	47.2	42.7
Cumberland	816.6	6,239	170.7	44.3	39.2
Dauphin	2,335.9	18,846	627.9	145.3	131.2
Franklin	326.7	2,444	68.2	17.6	15.7
Lancaster	1,975.4	15,853	419.2	110.7	95.7
Lebanon	201.4	1,655	53.7	11.8	11.3
Perry	47.9	340	8.0	2.3	2.0
York	943.7	7,709	217.9	52.6	48.1
Region Total	\$8,158.8	64,814	\$1,905.3	\$469.9	\$419.0
% Change	2.4%	0.7%	3.7%	1.8%	3.2%

2014	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Adams	\$666.0	5,074	\$142.1	\$36.5	\$32.4
Berks	795.8	6,564	186.5	45.6	41.0
Cumberland	774.0	6,215	164.1	42.7	37.5
Dauphin	2,314.8	18,709	607.0	144.7	128.0
Franklin	324.3	2,438	65.2	17.5	15.2
Lancaster	1,919.9	15,731	403.1	108.7	92.4
Lebanon	200.9	1,667	51.7	11.8	11.0
Perry	47.4	328	7.6	2.3	2.0
York	923.0	7,637	209.2	51.9	46.5
Region Total	\$7,966.1	64,363	\$1,836.5	\$461.6	\$405.9

Dutch Country Roads – Travel Economy Impacts, 2014 & 2015

DUTCH COUNTRY ROADS TRAVEL ECONOMY IMPACTS, 2014 and 2015 (dollar amounts in millions)

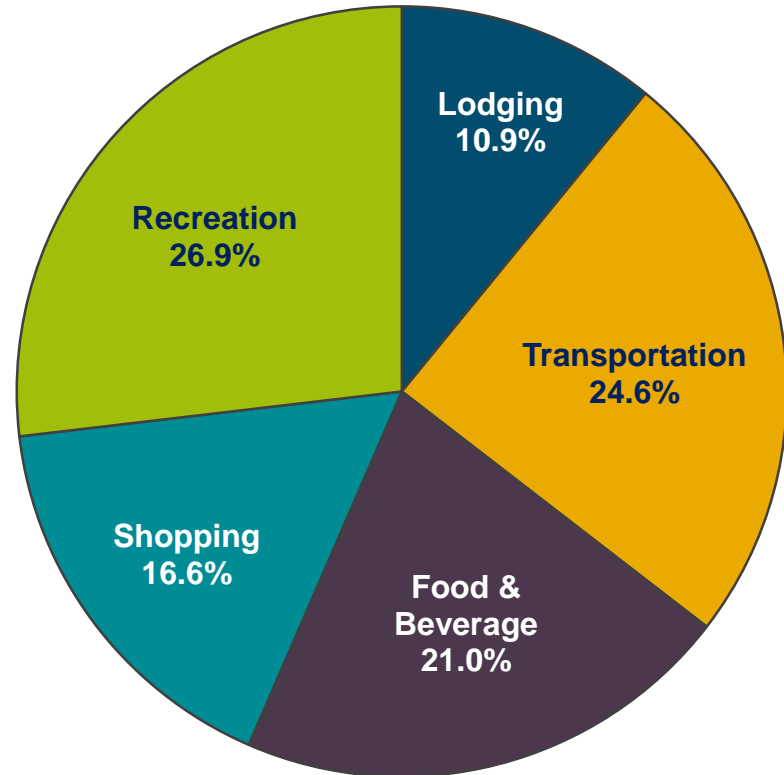
2015	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Adams	\$725.5	7,707	\$278.2	\$66.1	\$66.6
Berks	870.3	11,049	406.1	82.5	86.1
Cumberland	861.7	9,652	330.6	77.5	79.0
Dauphin	2,470.6	26,605	1,059.7	251.1	264.7
Franklin	344.7	4,099	145.0	30.9	31.6
Lancaster	2,087.7	24,060	798.7	191.6	192.8
Lebanon	212.3	2,940	116.4	20.9	22.7
Perry	50.5	723	24.4	4.1	4.1
York	995.4	12,627	448.7	92.6	97.0
Region Total	\$8,618.8	99,462	\$3,607.7	\$817.2	\$844.5
% Change	2.5%	1.7%	3.0%	1.5%	3.2%

2014	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Adams	\$701.8	7,587	\$272.1	\$64.3	\$65.2
Berks	838.9	10,823	393.1	80.2	82.6
Cumberland	816.0	9,515	320.7	74.9	75.5
Dauphin	2,445.8	26,238	1,028.4	250.3	258.2
Franklin	341.7	4,033	140.4	30.7	30.6
Lancaster	2,027.0	23,659	774.6	188.2	186.1
Lebanon	211.7	2,907	113.5	20.9	22.1
Perry	49.9	692	23.9	4.1	3.9
York	972.7	12,368	435.7	91.4	93.8
Region Total	\$8,405.3	97,821	\$3,502.3	\$805.0	\$818.0

Lehigh Valley

- The Lehigh Valley region is comprised the following counties: Lehigh and Northampton.
- Travelers spent over \$2.1 billion in the Lehigh Valley region in 2015 – a new record high and a 6.7% increase from 2014, which was the second largest percentage increase of the state's 11 tourism regions and the fifth largest dollar increase.
- With its close proximity to the NY and NJ markets, a strong day-trip market, and numerous regional attractions, the Lehigh Valley region continued to have the highest proportion of traveler spending on recreation among PA's tourism regions and the lowest share spent on transportation in 2015.

Lehigh Valley Region 2015 Spending by Category

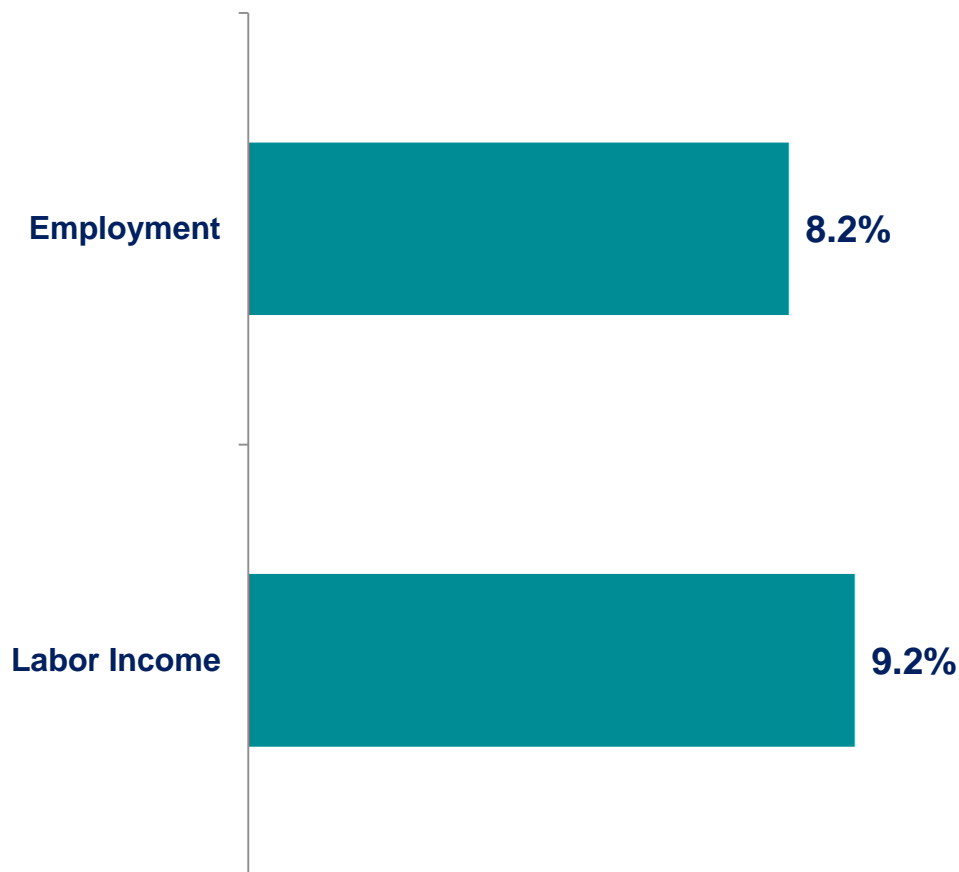


Source: Tourism Economics

Lehigh Valley

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- The travel industry was responsible for 9.2% of the region's labor income in 2015 – a percentage point above the industry's 8.1% share of the region's employment.
- The region ranked 6th among the state's 11 tourism regions in the actual number of travel-supported jobs in 2015 and 9th in terms of the industry's share of regional employment.

Travel Industry Share of Regional Economy



Lehigh Valley – Traveler Spending & Employment Timelines

LEHIGH VALLEY TRAVELER SPENDING, 2005 – 2015 (dollar amounts in millions)

County	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Lehigh	\$867.2	\$891.2	\$952.9	\$1,061.4	\$872.1	\$925.4	\$996.3	\$1,030.7	\$1,041.7	\$1,054.4	\$1,127.8
Northampton	472.5	494.2	517.7	581.2	518.3	596.1	761.4	827.0	863.9	921.8	981.5
Region Total	\$1,339.7	\$1,385.4	\$1,470.6	\$1,642.6	\$1,390.4	\$1,521.4	\$1,757.7	\$1,857.7	\$1,905.6	\$1,976.2	\$2,109.4
% Change	---	3.4%	6.2%	11.7%	-15.4%	9.4%	15.5%	5.7%	2.6%	3.7%	6.7%

LEHIGH VALLEY TRAVEL INDUSTRY EMPLOYMENT, 2005 – 2015

County	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Lehigh	8,079	8,160	8,242	8,274	7,732	7,555	7,624	7,838	7,970	7,983	8,119
Northampton	4,963	4,938	5,111	5,208	5,074	5,448	5,816	6,180	6,789	6,920	7,127
Region Total	13,042	13,098	13,353	13,482	12,806	13,003	13,440	14,018	14,760	14,903	15,246
% Change	---	0.4%	1.9%	1.0%	-5.0%	1.5%	3.4%	4.3%	5.3%	1.0%	2.3%

Lehigh Valley –Traveler Spending by Category

LEHIGH VALLEY TRAVELER SPENDING BY CATEGORY, 2014 and 2015 (dollar amounts in millions)

2015	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Lehigh	\$127.2	\$265.8	\$222.1	\$222.6	\$290.1	\$1,127.8
Northampton	102.9	178.2	128.7	343.9	227.8	981.5
Region Total	\$230.1	\$444.0	\$350.8	\$566.6	\$517.9	\$2,109.4
% Change	13.9%	5.8%	4.9%	9.1%	3.4%	6.7%

2014	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Lehigh	\$107.3	\$252.9	\$210.2	\$207.1	\$277.0	\$1,054.4
Northampton	94.7	166.8	124.3	312.0	223.9	921.8
Region Total	\$202.0	\$419.7	\$334.5	\$519.1	\$500.9	\$1,976.2

Lehigh Valley – Tourism Satellite Account

LEHIGH VALLEY TOURISM SATELLITE ACCOUNT CATEGORIES, 2014 and 2015 (dollar amounts in millions)				
2015	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Lehigh	\$1,127.8	\$3.5	\$59.2	\$1,190.5
Northampton	981.5	2.9	51.5	1,036.5
Region Total	\$2,109.4	\$6.4	\$110.8	\$2,226.5
% Change	6.7%	13.4%	8.8%	6.9%

2014	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Lehigh	\$1,054.4	\$3.0	\$54.3	\$1,111.7
Northampton	921.8	2.7	47.5	971.9
Region Total	\$1,976.2	\$5.6	\$101.8	\$2,083.6

*Non-Traveler Personal Consumption Expenditures represent travel-related consumer durable purchases, such as an RV, boat, or furniture for a vacation home.

Lehigh Valley –Travel Industry Impacts, 2014 & 2015

LEHIGH VALLEY TRAVEL INDUSTRY IMPACTS, 2014 and 2015 (dollar amounts in millions)

2015	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Lehigh	\$1,127.8	8,119	\$247.2	\$62.6	\$55.7
Northampton	981.5	7,127	318.0	64.0	62.6
Region Total	\$2,109.4	15,246	\$565.2	\$126.6	\$118.3
% Change	6.7%	2.3%	7.3%	5.6%	7.1%

2014	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Lehigh	\$1,054.4	7,983	\$227.1	\$58.7	\$51.5
Northampton	921.8	6,920	299.6	61.2	58.9
Region Total	\$1,976.2	14,903	\$526.7	\$119.9	\$110.5

Lehigh Valley –Travel Economy Impacts, 2014 & 2015

LEHIGH VALLEY TRAVEL ECONOMY IMPACTS, 2014 and 2015 (dollar amounts in millions)

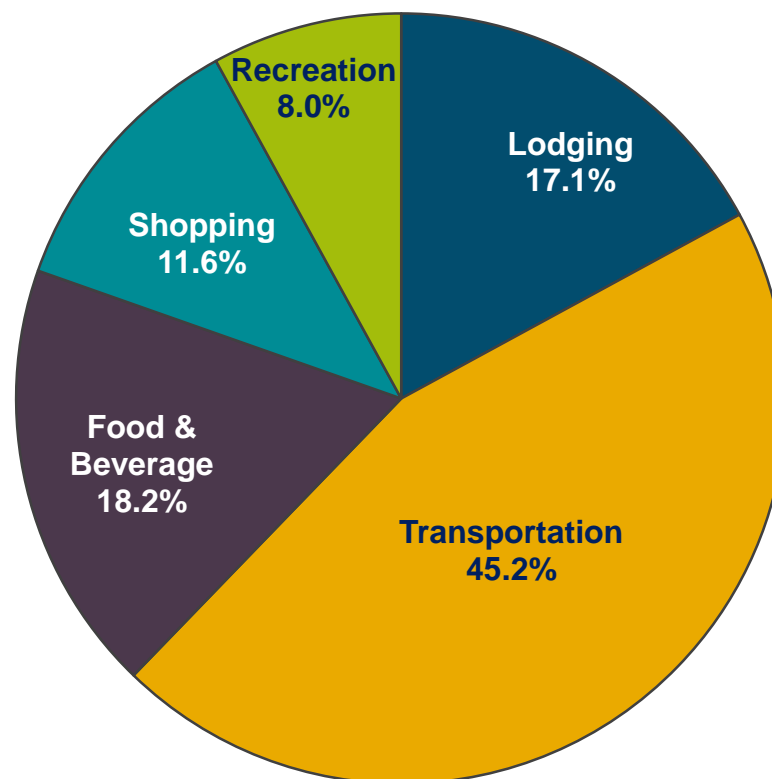
2015	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Lehigh	\$1,190.5	12,836	\$479.5	\$109.3	\$112.2
Northampton	1,036.5	11,120	566.7	112.6	126.3
Region Total	\$2,226.5	23,956	\$1,046.2	\$221.9	\$238.6
% Change	6.9%	3.1%	5.8%	5.3%	7.1%

2014	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Lehigh	\$1,111.7	12,510	\$449.4	\$102.9	\$103.8
Northampton	971.9	10,732	539.1	107.9	119.0
Region Total	\$2,083.6	23,242	\$988.6	\$210.7	\$222.8

Philadelphia & The Countryside

- Philadelphia and The Countryside region is comprised of the following counties: Bucks, Chester, Delaware, Montgomery, and Philadelphia.
- Travelers spent nearly \$9.4 billion in the Philadelphia & The Countryside region in 2015 – a new record high and a 3.0% increase from 2014.
- As in prior years, the region continued to have the highest proportion of traveler spending on transportation and lodging and the lowest proportions on recreation, food & beverages, and shopping of the state's 11 tourism regions in 2015.

Philadelphia & The Countryside Region 2015 Spending by Category

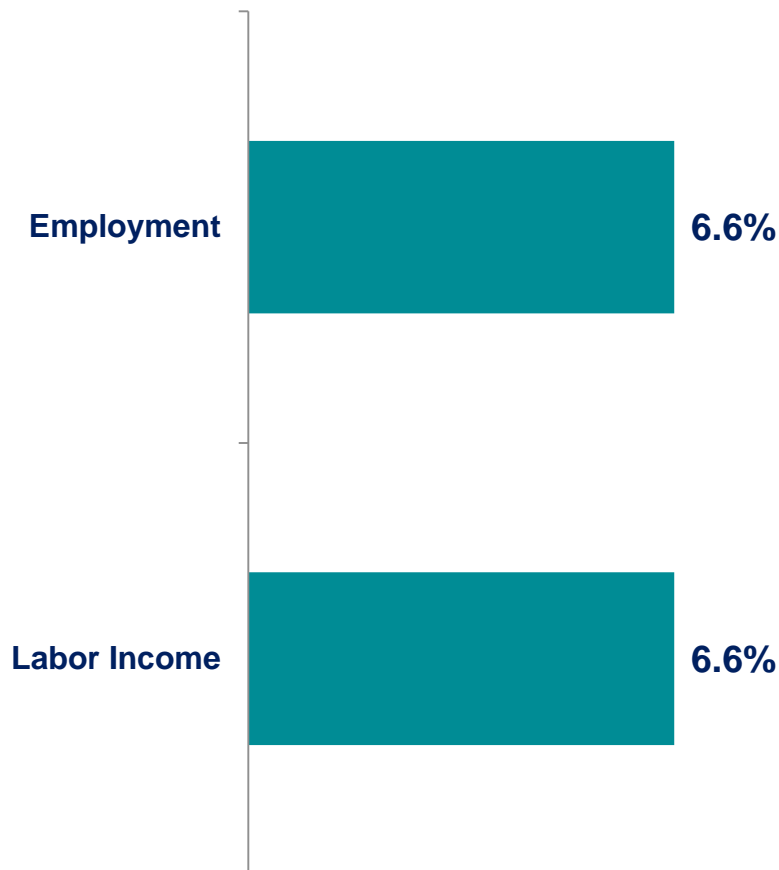


Source: Tourism Economics

Philadelphia and The Countryside

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total economy.
- The travel-supported labor income share for the Philadelphia and The Countryside region was 6.6% in 2015 – a 0.2 percentage point increase from 2013, matching the industry's share of the region's employment base.
- The region continued to have the highest number of jobs supported by the travel industry among the state's tourism regions in 2015, but the industry's contributions to labor income and employment were the smallest of the state's tourism regions due to the size and great diversity of the regional economy.

Travel Industry Share of Regional Economy



Philadelphia & The Countryside – Traveler Spending & Employment Timelines

PHILADELPHIA AND THE COUNTRYSIDE TRAVELER SPENDING, 2005 – 2015 (dollar amounts in millions)

County	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Bucks	\$582.1	\$602.8	\$640.3	\$704.5	\$629.2	\$673.2	\$728.0	\$743.6	\$742.1	\$759.9	\$795.5
Chester	543.8	557.7	595.5	680.1	608.2	646.7	684.2	713.8	730.4	735.6	760.1
Delaware	498.1	510.7	558.2	613.9	530.4	564.5	654.5	645.8	642.1	655.4	658.6
Montgomery	985.2	1,014.0	1,079.3	1,176.2	1,014.2	1,070.8	1,180.2	1,221.8	1,244.9	1,271.9	1,327.0
Philadelphia	4,401.4	4,673.9	4,879.8	5,334.7	4,736.2	5,044.0	5,290.9	5,389.9	5,590.6	5,683.1	5,836.8
Region Total	\$7,010.6	\$7,359.0	\$7,753.2	\$8,509.5	\$7,518.1	\$7,999.1	\$8,537.9	\$8,714.9	\$8,950.1	\$9,105.9	\$9,378.1
% Change	---	5.0%	5.4%	9.8%	-11.7%	6.4%	6.7%	2.1%	2.7%	1.7%	3.0%

PHILADELPHIA AND THE COUNTRYSIDE TRAVEL INDUSTRY EMPLOYMENT, 2005 – 2015

County	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Bucks	8,054	8,280	8,545	8,795	8,482	8,389	8,568	8,717	8,776	8,850	8,999
Chester	6,790	6,944	7,172	7,286	6,983	6,823	6,879	7,052	7,176	7,288	7,397
Delaware	6,998	6,965	6,931	6,936	6,701	6,697	6,936	7,158	7,360	7,486	7,535
Montgomery	12,599	12,822	12,909	12,983	12,380	12,159	12,337	13,008	13,366	13,430	13,618
Philadelphia	31,855	32,640	33,719	33,755	31,929	32,221	32,669	33,628	34,415	34,803	35,577
Region Total	66,295	67,651	69,275	69,755	66,474	66,289	67,390	69,563	71,093	71,857	73,127
% Change	---	2.0%	2.4%	0.7%	-4.7%	-0.3%	1.7%	3.2%	2.2%	1.1%	1.8%

Philadelphia & The Countryside – Traveler Spending by Category

PHILADELPHIA AND THE COUNTRYSIDE TRAVELER SPENDING BY CATEGORY, 2014 and 2015 (dollar amounts in millions)

2015	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Bucks	\$139.0	\$175.8	\$119.3	\$82.3	\$279.0	\$795.5
Chester	135.5	167.7	115.6	77.4	263.9	760.1
Delaware	102.0	152.0	94.8	73.4	236.3	658.6
Montgomery	330.8	254.8	165.9	93.6	481.9	1,327.0
Philadelphia	893.9	952.1	594.5	422.5	2,973.9	5,836.8
Region Total	\$1,601.2	\$1,702.5	\$1,090.2	\$749.2	\$4,235.0	\$9,378.1
% Change	3.6%	3.5%	2.2%	3.2%	2.7%	3.0%

2014	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Bucks	\$130.6	\$168.1	\$115.5	\$78.5	\$267.3	\$759.9
Chester	1134.4	163.0	113.4	76.3	248.6	735.6
Delaware	97.6	145.6	94.8	73.9	243.6	655.4
Montgomery	315.0	245.2	159.6	90.7	461.3	1,271.9
Philadelphia	868.4	922.9	583.0	406.5	2,902.3	5,683.1
Region Total	\$1,546.0	\$1,644.8	\$1,066.2	\$725.8	\$4,123.1	\$9,105.9

Philadelphia & The Countryside – Tourism Satellite Account

PHILADELPHIA AND THE COUNTRYSIDE TOURISM SATELLITE ACCOUNT CATEGORIES, 2014 and 2015 (dollar amounts in millions)				
2015	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Bucks	\$795.5	\$3.2	\$41.8	\$840.5
Chester	760.1	3.1	39.9	803.2
Delaware	658.6	2.7	34.6	695.9
Montgomery	1,327.0	4.9	69.7	1,401.6
Philadelphia	5,836.8	60.0	306.5	6,203.3
Region Total	\$9,378.1	\$73.9	\$492.4	\$9,944.4
% Change	3.0%	3.5%	5.0%	3.1%

2014	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Bucks	\$759.9	\$3.0	\$39.1	\$802.1
Chester	735.6	3.1	37.9	776.6
Delaware	655.4	2.5	33.8	691.7
Montgomery	1,271.9	4.4	65.5	1,341.7
Philadelphia	5,683.1	58.4	292.7	6,034.2
Region Total	\$9,105.9	\$71.4	\$469.0	\$9,646.3

Philadelphia & The Countryside – Travel Industry Impacts, 2014 & 2015

PHILADELPHIA AND THE COUNTRYSIDE TRAVEL INDUSTRY IMPACTS, 2014 and 2015 (dollar amounts in millions)

2015	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Bucks	\$795.5	8,999	\$271.8	\$54.0	\$52.6
Chester	760.1	7,397	254.7	51.2	49.6
Delaware	658.6	7,535	280.1	49.9	51.1
Montgomery	1,327.0	13,618	503.3	94.3	94.6
Philadelphia	5,836.8	35,577	1,894.3	423.4	372.4
Region Total	\$9,378.1	73,127	\$3,204.1	\$672.9	\$620.3
% Change	3.0%	1.8%	5.6%	2.5%	4.7%

2014	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Bucks	\$759.9	8,850	\$257.0	\$52.2	\$50.0
Chester	735.6	7,288	244.0	50.2	47.7
Delaware	655.4	7,486	270.1	49.7	49.7
Montgomery	1,271.9	13,430	483.3	91.9	90.9
Philadelphia	5,683.1	34,803	1,779.5	412.6	354.0
Region Total	\$9,105.9	71,857	\$3,033.9	\$656.7	\$592.4

Philadelphia & The Countryside – Travel Economy Impacts, 2014 & 2015

PHILADELPHIA AND THE COUNTRYSIDE TRAVEL ECONOMY IMPACTS, 2014 and 2015 (dollar amounts in millions)

2015	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Bucks	\$840.5	15,835	\$596.3	\$94.5	\$106.3
Chester	803.2	12,805	528.2	89.5	100.2
Delaware	695.9	13,360	582.5	87.6	103.3
Montgomery	1,401.6	23,246	1,010.3	165.7	191.2
Philadelphia	6,203.3	56,945	3,350.4	712.8	752.1
Region Total	\$9,944.4	122,191	\$6,067.6	\$1,150.1	\$1,253.1
% Change	3.1%	2.8%	4.4%	2.3%	4.7%

2014	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Bucks	\$802.1	15,397	\$574.1	\$91.5	\$100.9
Chester	776.6	12,471	512.2	87.9	96.4
Delaware	691.7	13,083	567.5	87.4	100.6
Montgomery	1,341.7	22,665	980.5	161.9	183.8
Philadelphia	6,034.2	55,262	3,178.6	695.0	714.9
Region Total	\$9,646.3	118,878	5,813.0	\$1,123.7	\$1,196.6

Methodology and Background



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Methods and Data Sources

- Domestic traveler expenditure estimates are derived from a representative survey of U.S. travelers provided by Longwoods International. The estimates are broken out by sectors (lodging, transport at destination, food & beverage, retail, and recreation), by purpose (business and leisure), and by type of stay (day and overnight).
- Tourism Economics (TE) then adjusts these levels of spending based on a range of known measures of travel and tourism activity:
 - Overseas traveler spending (source: National Travel and Tourism Office, TE)
 - Canadian traveler spending (source: Statistics Canada, TE)
 - Bed tax receipts
 - Sales tax by sector
 - Spending on air travel which accrues to all airports and locally-based airlines
 - Gasoline purchases by visitors (source: TE calculation)
 - Smith Travel Research data on hotel revenues
 - Construction Value by McGraw-Hill Construction
 - Industry data on employment, wages, GDP, and sales (source: U.S. Bureau of Economic Analysis, U.S. Bureau of Labor Statistics, U.S. Census Bureau)

Methods and Data Sources

- An IMPLAN model was compiled for the Commonwealth of Pennsylvania, tracing the flow of traveler-related expenditures through the local economy and their effects on employment, wages, and taxes. The IMPLAN model also provides estimates of the indirect (supplier) and induced (income) impacts of travel and tourism.
- All results are benchmarked and cross-checked and adjusted based on the following:
 - U.S. Bureau of Labor Statistics and Bureau of Economic Analysis (employment and wages by industry)
 - U.S. Census (business sales by industry)
- The source of the employment and wage data is the Regional Economic Information System (REIS), Bureau of Economic Analysis, U.S. Department of Commerce. All employment rankings are based on U.S. Bureau of Labor Statistics employment statistics (ES202/QCEW) data.

Selected Recent Economic Impact Clients

Associations / Companies

Center for Exhibition Industry
Research (Economic Impact
of Visa Restrictions)

DMAI (Event Impact
Calculator for 80 CVBs)

U.S. Travel Association
(Impact of travel promotion)

InterContinental Hotels

States

California

Georgia

Maryland

New York

North Carolina

Ohio

Pennsylvania

Wisconsin

Cities

Baltimore, MD

Columbus, OH

Kansas City, MO

London, United Kingdom

New York City

Omaha, NE

Orlando, FL

Philadelphia, PA

Pittsburgh, PA

Rockford, IL

Countries / Provinces

Bahamas

Bermuda

Cayman Islands

Dubai

Ontario Canada

St. Lucia

United Kingdom



About Tourism Economics

- Tourism Economics, headquartered in Philadelphia, is an Oxford Economics company dedicated to providing high value, robust, and relevant analyses of the tourism sector that reflects the dynamics of local and global economies. By combining quantitative methods with industry knowledge, Tourism Economics designs custom market strategies, project feasibility analysis, tourism forecasting models, tourism policy analysis, and economic impact studies.
- Our staff have worked with over 100 destinations to quantify the economic value of tourism, forecast demand, guide strategy, or evaluate tourism policies.
- Oxford Economics is one of the world's leading providers of economic analysis, forecasts and consulting advice. Founded in 1981 as a joint venture with Oxford University's business college, Oxford Economics is founded on a reputation for high quality, quantitative analysis and evidence-based advice. For this, it draws on its own staff of 40 highly-experienced professional economists; a dedicated data analysis team; global modeling tools; close links with Oxford University, and a range of partner institutions in Europe, the U.S. and in the United Nations Project Link.
- For more information: info@tourismeconomics.com.



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