The Economic Impact of Travel and Tourism in Pennsylvania

Tourism Satellite Account
Calendar Year 2012

December 2013

TOURISM ECONOMICS
AN OXFORD ECONOMICS COMPANY

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State Overview

Key themes for 2012

- The Pennsylvania travel and tourism economy continued to expand in 2012 with travel and tourism industry sales (i.e., traveler spending) rising 3.8% to $38.4 billion compared to the $37.0 billion spent in 2011.
    - The number of travelers visiting Pennsylvania posted the highest growth rate since the recession, with the state hosting an estimated 192.3 million domestic and international travelers in 2012, with growth concentrated in the day-trip segment.
    - Overnight visitation expanded with hotel room nights increasing 1.1% in 2012.
    - Per trip spending fell slightly – a result of fewer people traveling to Pennsylvania by air.
- Traveler spending generated $67.0 billion in total economic activity throughout all industries in Pennsylvania in 2012.

Key results

- Travel- and tourism-related economic activity supported 470,953 jobs in total – both directly and indirectly, representing 6.5% of the state's total employment.
- The growth in travel-supported employment was nearly twice the state's overall employment growth rate for 2012.
- The state's travel and tourism sector directly represented $14.7 billion of the state's 2012 Gross Domestic Product (GDP), up 4.5% from 2011.
- Including direct, indirect and induced impacts, PA's travel and tourism industry generated $4.0 billion in state and local taxes and $4.0 billion in federal taxes in 2012.

On average, the dollars spent by 415 travelers supports one PA job.

One out of every 16 workers 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

Why quantify the tourism economy?

- By monitoring the travel and tourism industry's economic impact, policymakers can make informed decisions regarding the funding and prioritization of tourism development.
- Monitoring and quantifying 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 categories as other economic sectors – i.e., tax generation, employment, wages, and gross domestic product.

What is this a challenge?

- Most industry sectors, such as financial services, insurance, manufacturing, construction, and health care, for example, are easily defined within a country's national accounts statistics, with economic data specific to that industry calculated and provided according 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 for each of these industries attributable to travelers versus the amount attributable to local residents. The share attributable to travelers differs for each industry.

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 US, as well as a growing number of US States.
- The US Bureau of Economic Analysis (BEA) uses the TSA methodology to determine the economic contributions of business and leisure travelers to the US economy, issuing quarterly and annual estimates for 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 estimates of output and employment generated by US travel and tourism-related industries.

Benefits of the Tourism Satellite Account

Benefits of using the TSA methodology include:

- Enables comparisons of the importance of travel and tourism relative to other sectors of the economy in terms of Gross Domestic Product (GDP), employment, and income.
- Allows for benchmarking to other destinations.
- Tracks the economic contribution of the travel and tourism industry over time.
- Monitors strength by tracking travel- and tourism-related capital investment.
- Allows for analysis of the full impact of travel and tourism, which includes 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 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 US 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.

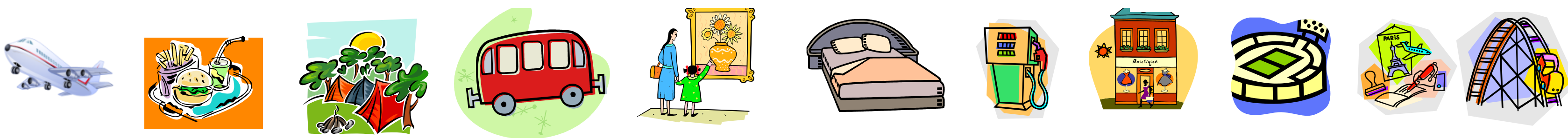
Key definitions

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 a hotel desk clerk using the wages he earned to pay for his groceries or the accountant who works for a company that supplies napkins to a restaurant frequented by travelers using her wages to purchase flowers from her local florist.

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**.

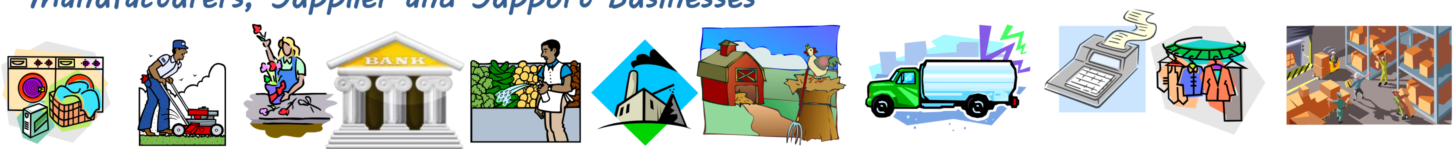
Businesses Catering to the Traveling Public



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

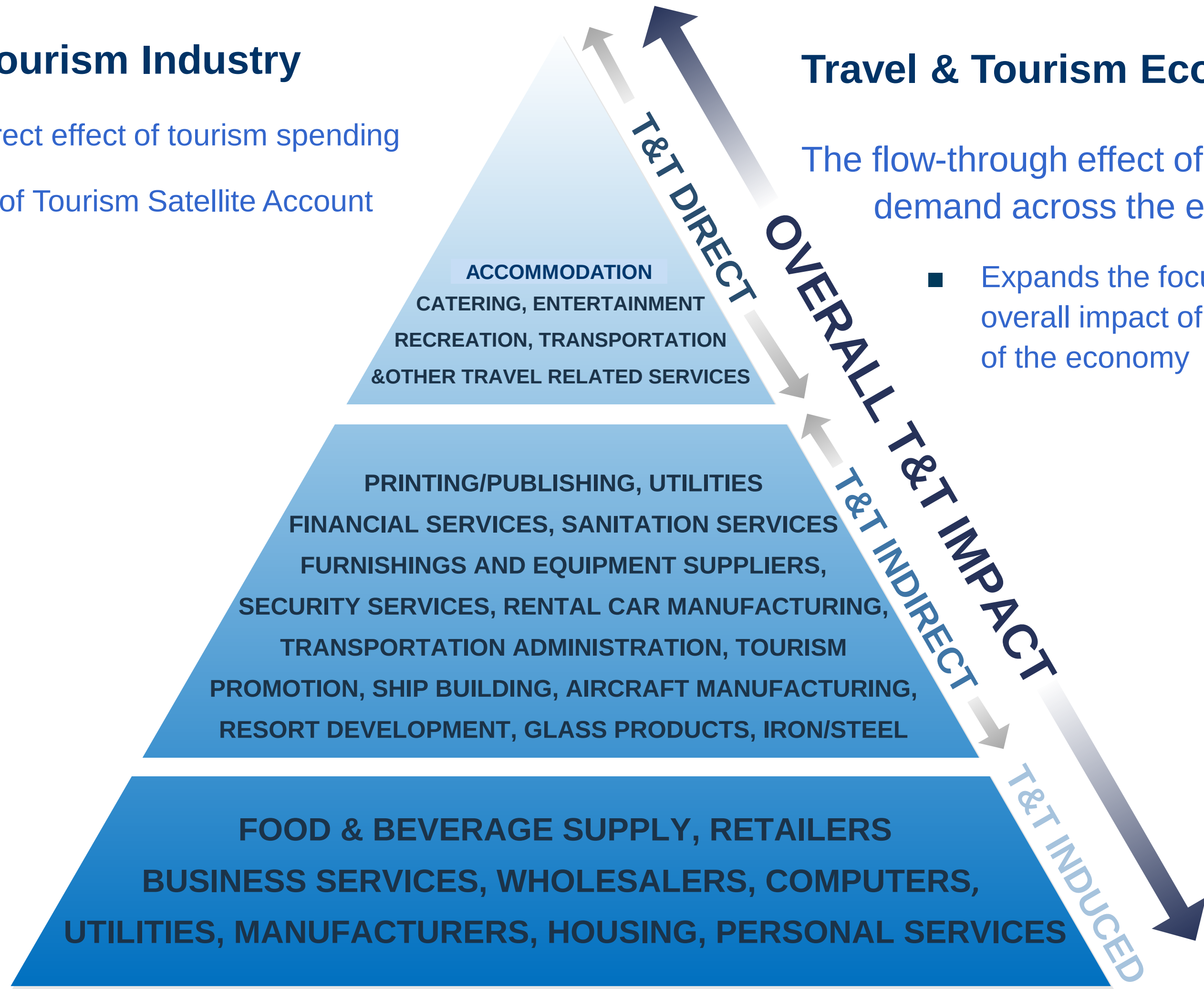
Travel & Tourism Industry

- 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 US & International Traveler Spending

- Trends
- Travel Segments
- Spending Categories

Key trends in 2012

- Travel and tourism is an integral component of Pennsylvania's economy.

- Pennsylvania tourism industry sales rose 3.8% to $38.4 billion in 2012. Spending increases were strongest in the retail and transportation sectors, with the growth in the number of day-trip travelers outpacing that of the overnight segment.

- There were several factors driving growth:
  - Domestic trip growth in 2012 was the strongest since the recession ended.
  - Much of the trip growth was by day-trip travelers.
  - The number of hotel rooms sold and average room rate both rose in 2012.
  - Gas prices were less volatile in 2012 than in prior years.

- With the sustained spending increases, PA travel- and tourism-related businesses hired employees at nearly twice the rate of PA businesses overall.

A new peak in traveler spending

- Spending by travelers to and/or within PA rose 3.8% to $38.4 billion in 2012 – marking the third straight year of increase.
- Day-trip travel posted the strongest growth in spending (+7.3%) with strong increases from both leisure and business travel segments, and compared to the 2.0% increase in spending by overnight travelers.
- Several factors drove the spending growth:
  - Increase in number of travelers
  - Price increases
  - Spending increases as travelers purchased more goods and services and/or more expensive items.

Includes spending by both U.S. and international travelers.

Source: Tourism Economics

Traveler spending by visitor type, 2011 & 2012

- Leisure travel spending outpaced the growth of business travel spending in 2012.
- As in 2011, the leisure segment accounted for nearly 84% of total visitor spending in PA in 2012.

Traveler Spending by Visitor Type
(in billions of US dollars)

2012	Leisure	Business	Total
Overnight	$19.3	$5.2	$24.4
Day-Trip	$12.8	$1.1	$14.0
Total	$32.1	$6.3	$38.4
2011			
Overnight	$18.9	$5.1	$24.0
Day-Trip	$12.0	$1.1	$13.1
Total	$30.9	$6.2	$37.0
Percent Change			
Overnight	2.1%	1.4%	2.0%
Day-Trip	7.3%	5.6%	7.1%
Total	4.1%	2.1%	3.8%

Traveler spending by market segment

- The growth rate in spending for PA's leisure travel segment outpaced that of business travel by a factor of close to 2 to 1 in 2012.
- While the growth rate in spending by the overnight segment was substantially below that of the day-trip segment in 2012, total spending by overnight travelers was $10 billion more than that of PA's day-trip travelers, accounting for close to two-thirds of total traveler spending.

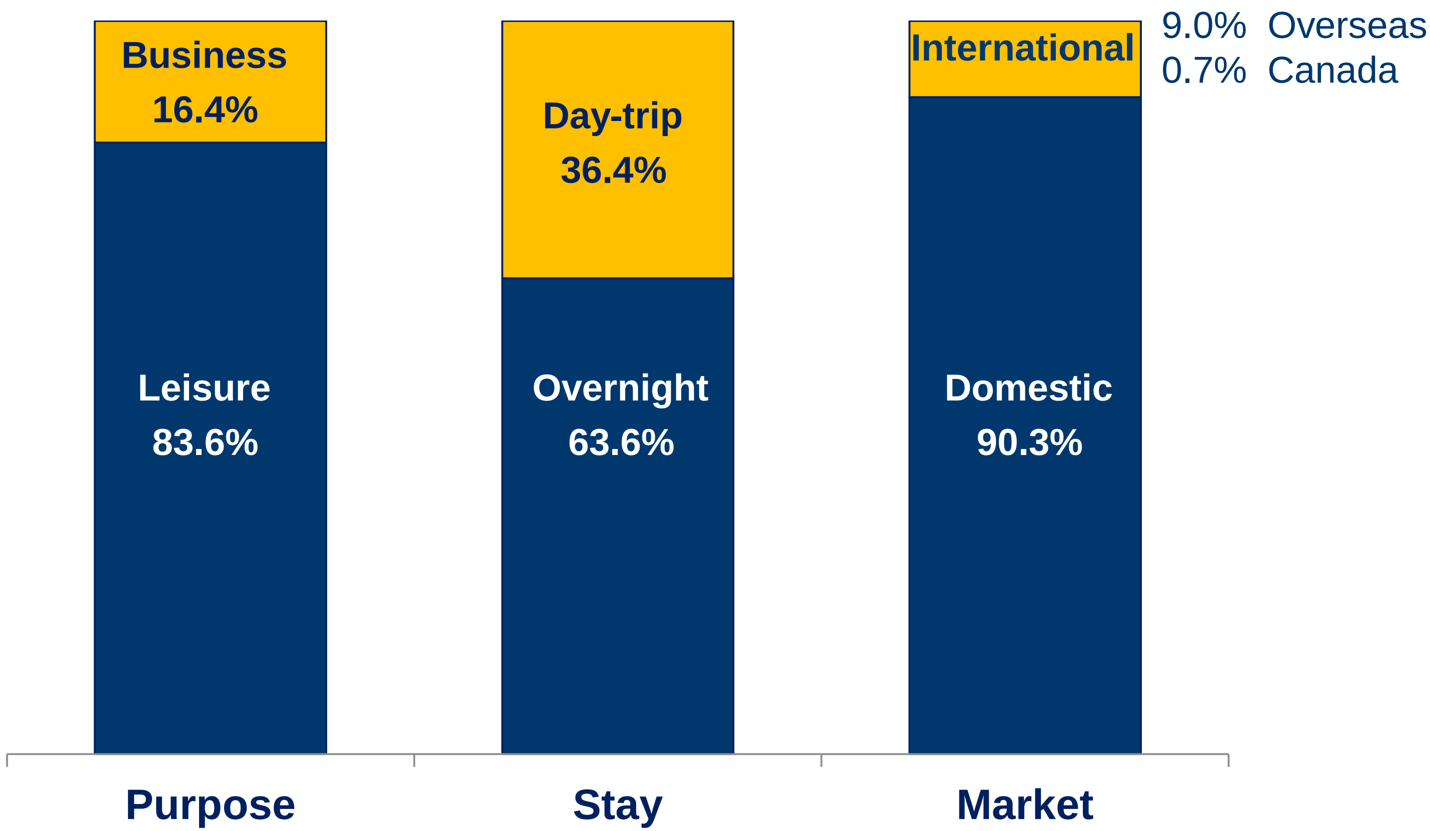
2012 Traveler Spending by Segment
(in billions of US dollars)

Purpose		Stay		Market	
Leisure	$32.1	Overnight	$24.4	US Domestic	$34.7
Business	$ 6.3	Day-trip	$14.0	Overseas	$ 3.5
				Canada	$ 0.3
Total	**$38.4**	**Total**	**$38.4**	**Total**	**$38.4**
Growth Rate					
Leisure	4.1%	Overnight	2.0%	US Domestic	3.8%
Business	2.1%	Day-trip	7.1%	Overseas	3.7%
Total	**3.8%**	**Total**	**3.8%**	Canada	2.5%
Market Share					
Leisure	83.6%	Overnight	63.6%	US Domestic	90.3%
Business	16.4%	Day-trip	36.4%	Overseas	9.0%
				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 visitor ticket accruing to a PA airport, along with the PA portion of the ticket a traveler bought leaving the state).

Distribution of traveler spending by market segment

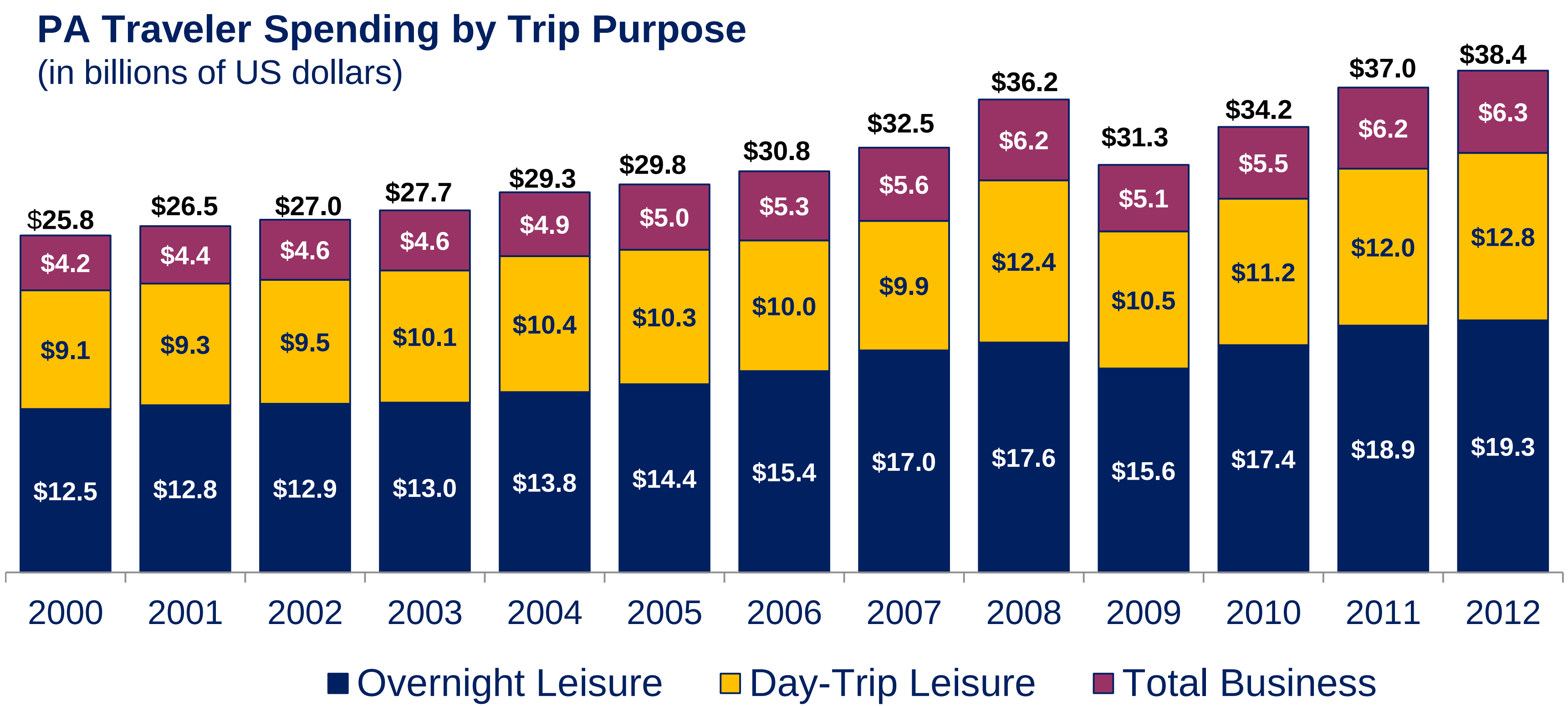
- US domestic, leisure, and overnight travel remained the dominant segments for PA's travel and tourism industry in 2012. The larger growth rate in spending by domestic (US) travelers resulted in a drop in the market share of international travel compared to 2011.



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

Total traveler spending by trip purpose, 2000 - 2012

- The day-trip segment -- both leisure and business – drove much of the increase in total traveler spending in 2012, with the day-trip leisure travel segment accounting for close to 60% of the increase in the total dollar amount of traveler spending.
- The business overnight travel segment registered the smallest percentage increase in traveler spending at roughly two-thirds the 2.1% rate for overnight leisure.

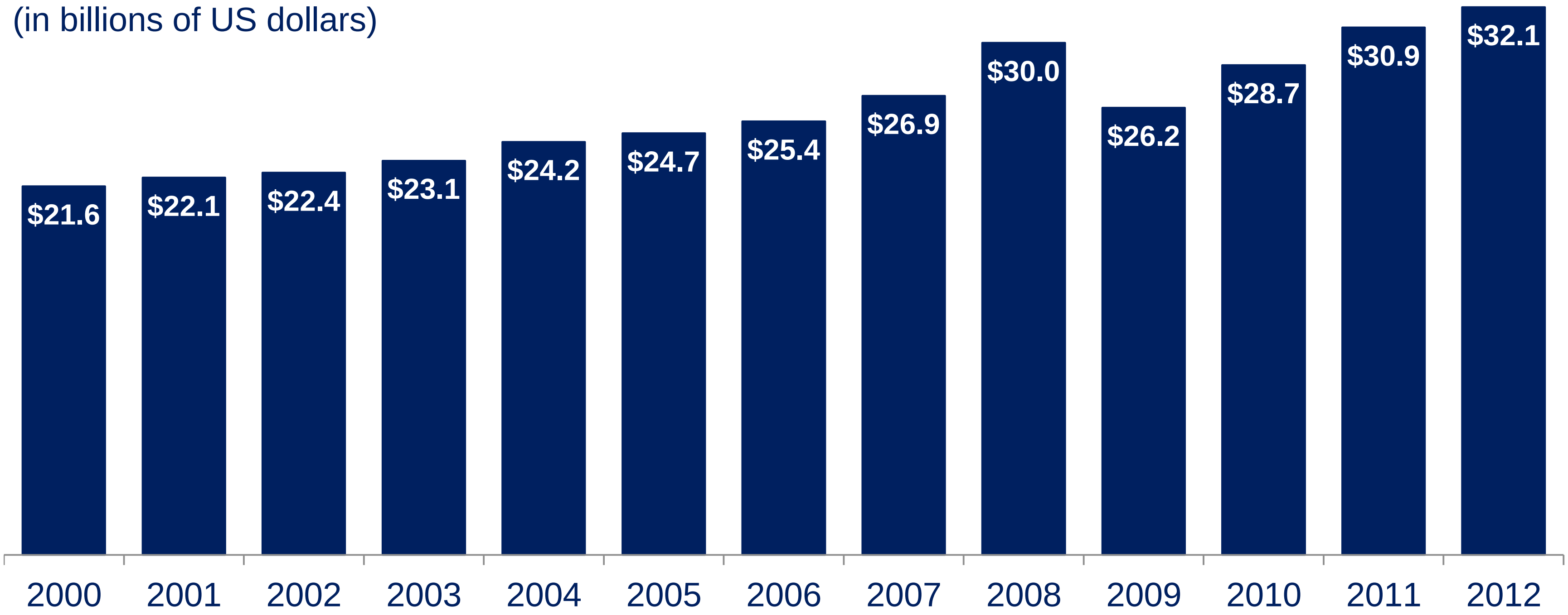


Source: Tourism Economics

Total leisure traveler spending, 2000 - 2012

- Total leisure traveler spending grew by $1.2 billion in 2012, or 4.1%, reaching a new record high.
- As noted above, both overnight and day-trip segments registered increases in 2012, but the strongest increase in both dollar and percentage terms was from the day-trip travel segment.

Total leisure traveler spending
(in billions of US dollars)

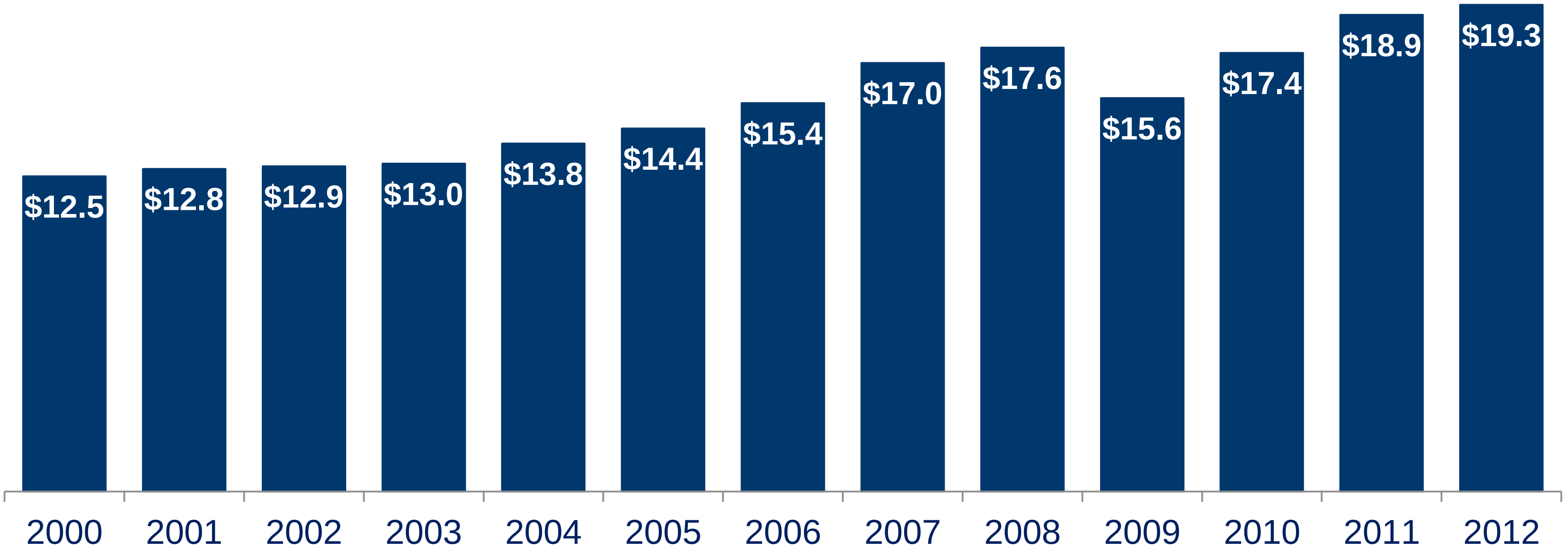


Source: Tourism Economics

Overnight leisure traveler spending, 2000 - 2012

- Spending by PA's overnight leisure travelers rose 2.1% in 2012 after two years of well-above-average growth following the recession.
- Total overnight leisure spending in 2012 was the highest level on record in non-inflation-adjusted dollars – approaching $20 billion.

Total overnight leisure traveler spending
(in billions of US dollars)



Source: Tourism Economics

2012 traveler spending by spending category

- The growth in total traveler spending returned to lower, but more sustainable levels in 2012 following the end of the recession, growing 3.8% overall in 2012.
- The nearly 4% increase in lodging revenue was derived from the 1.1% growth in lodging demand as well as higher room rates.
- Travelers spent more on shopping (i.e., retail purchases) in 2012 with a 5.5% growth rate that outpaced the 3.8% average in total traveler spending.

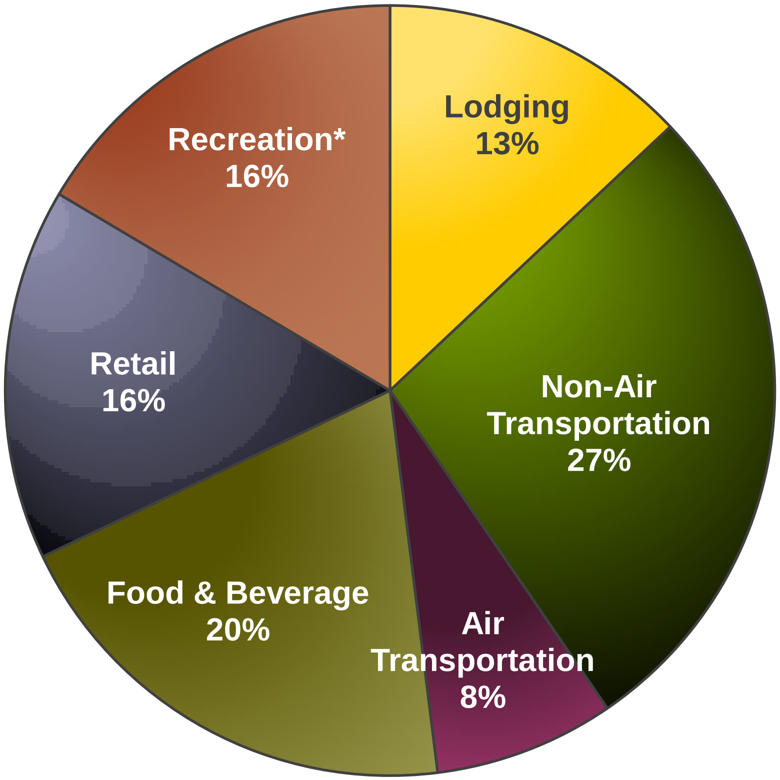
Tourism Industry Sales

(US$ Million)

Sector	2008	2009	2010	2011	2012	% Change
Lodging	$4,604	$4,046	$4,380	$4,792	$4,974	3.8%
Other Transport	$9,212	$7,970	$8,803	$10,078	$10,445	3.6%
Air	$3,180	$2,544	$2,681	$2,821	$2,968	5.2%
Food & bev.	$7,442	$6,602	$7,084	$7,400	$7,545	2.0%
Retail	$6,079	$5,145	$5,551	$5,811	$6,129	5.5%
Recreation	$5,637	$4,971	$5,666	$6,133	$6,378	4.0%
TOTAL	$36,154	$31,278	$34,165	$37,036	$38,440	3.8%
% Change		-13.5%	9.2%	8.4%	3.8%	

2012 traveler spending by spending category

Relative distribution of PA traveler spending



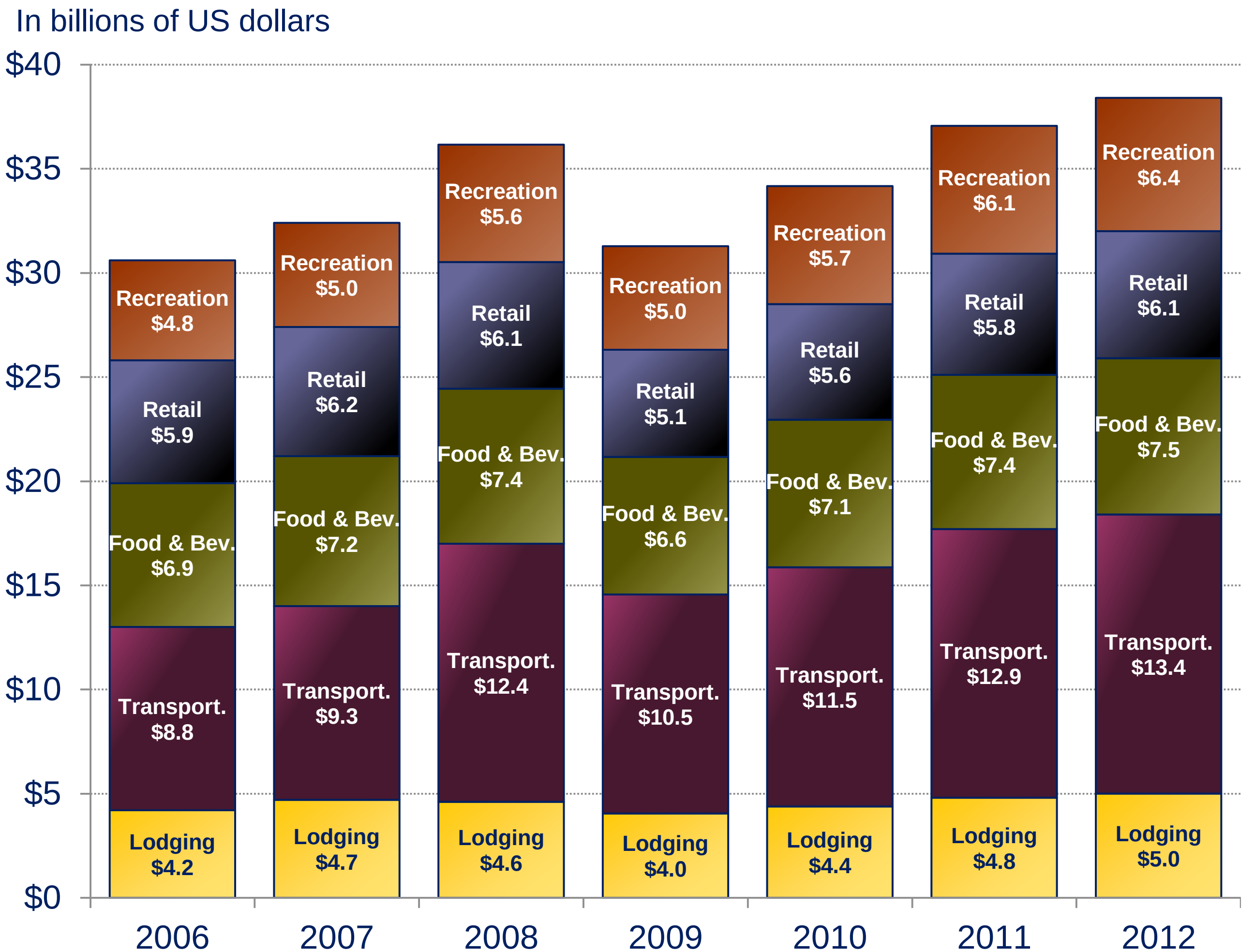
Includes spending by both domestic and international travelers.

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

Source: Tourism Economics

- There was little change in the relative distribution of dollars spent by travelers in PA in 2012 compared to 2011, with spending on retail and food & beverage purchases just slightly higher than in 2011.
- Transportation costs represented more than a third of traveler spending in PA in 2012 – the same proportion as in 2011.
- Food & Beverage was the second largest spending category, accounting for 20% of the total dollars spent by domestic and international travelers in PA in 2012.

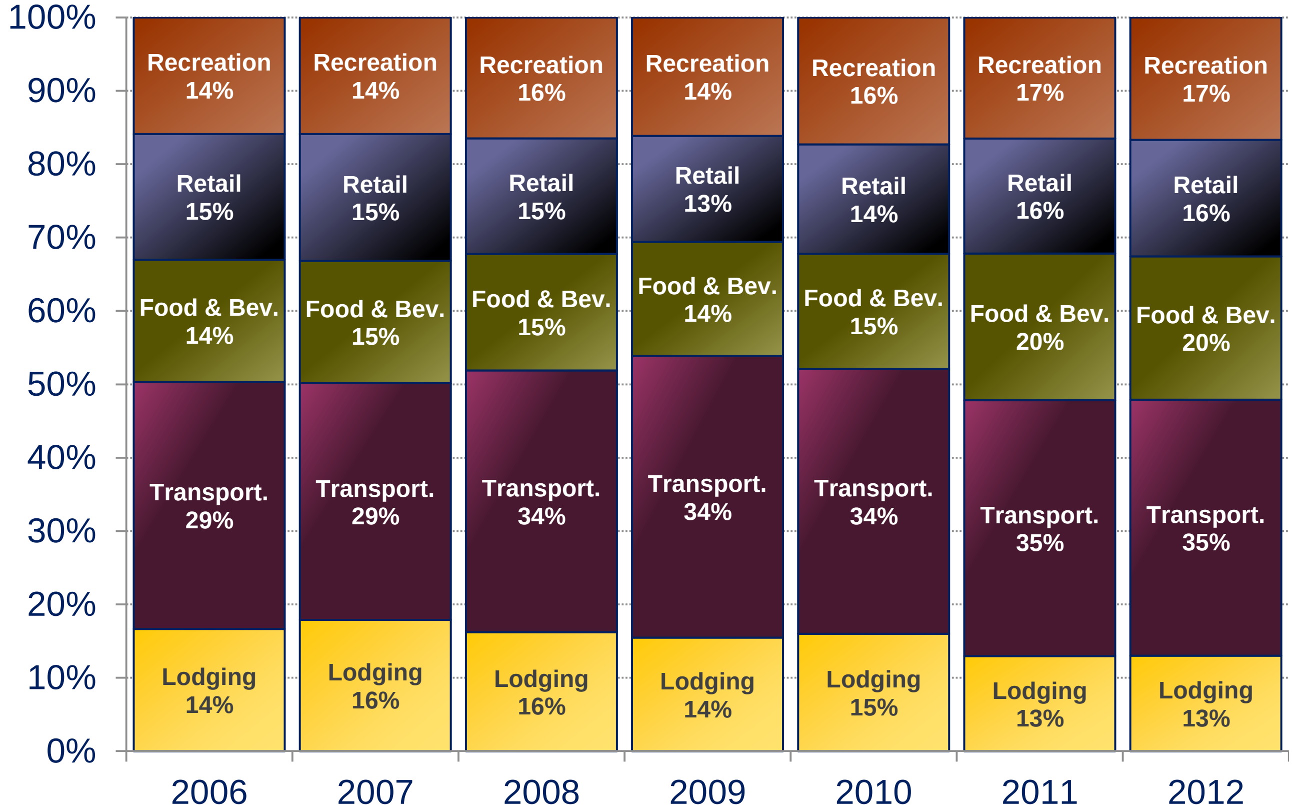
Traveler spending by spending category



Source: Tourism Economics, Longwoods International, US Office of Travel & Tourism Industries

- With the exception of the retail sector, traveler spending reached new record high levels for all the major spending categories in 2012 – including food & beverage, which had lagged the other spending categories during the post-recession recovery.
- Retail was the only sector that had yet to surpass its pre-recession record level (set in 2007) as of 2012.

Share of total traveler spending by category



Includes spending by both domestic and international travelers.

Source: Tourism Economics, Longwoods International, US Office of Travel & Tourism Industries

- After several years of volatility, the pattern of visitor spending in 2012 largely reflected that of 2011 travelers.
- Lodging and recreational spending maintained shares of 13% and 17%, respectively.
- The share of the visitor dollar spent on retail items grew 0.2 percentage points to 16%, an encouraging sign despite the fact total spending for retail is still below pre-recession levels.

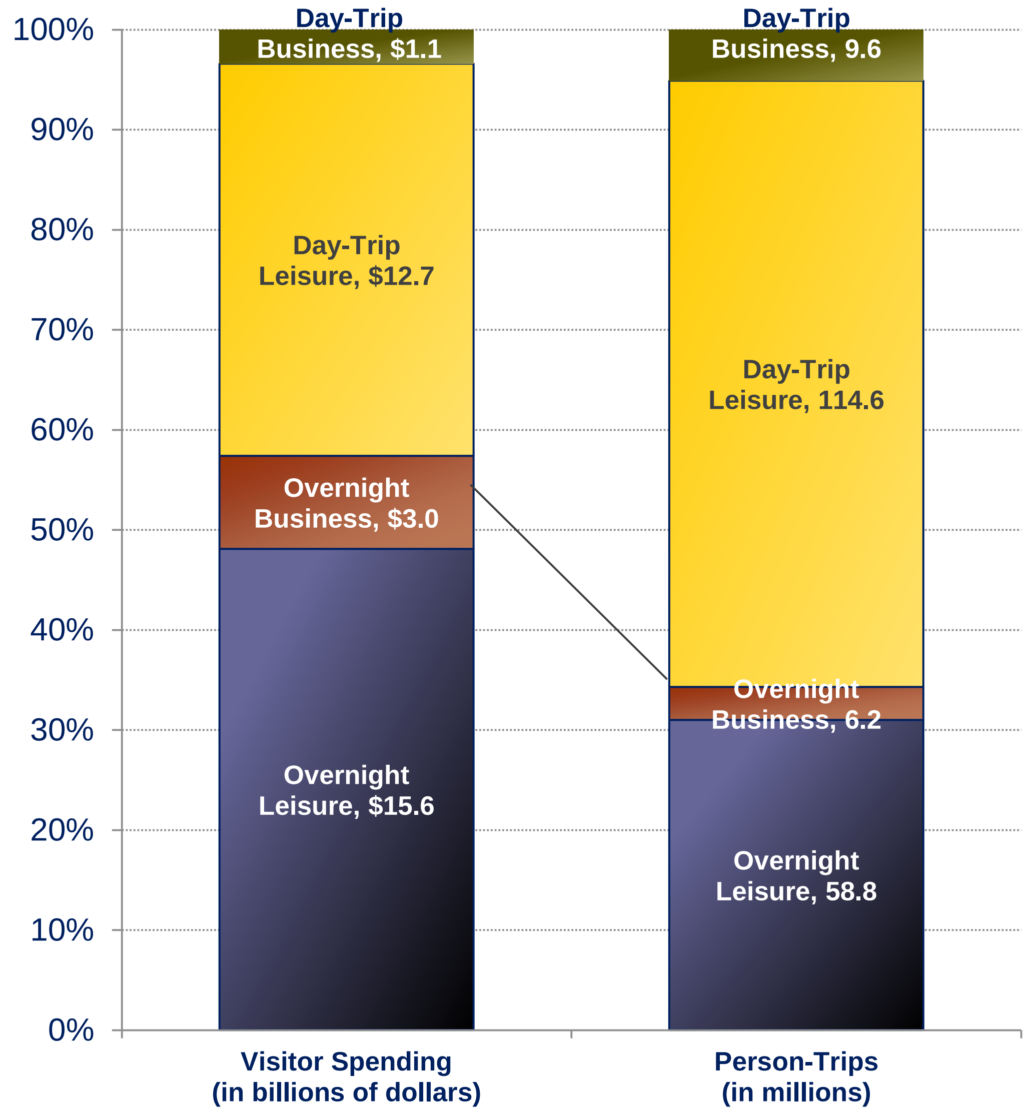
The Domestic Market in Detail

Domestic visits and traveler spending

- PA's total domestic visits (i.e., US travelers only, excludes travelers from Canada and overseas markets) rose 4.1% to 189 million person-trips in 2012.
- Overnight visits rose 1.3% to 65 million person trips.
- Day trips jumped after a flat 2011, increasing 5.7% to 124.2 million.
- Domestic in-state visitor spending rose 3.8% to $34.7 billion in 2012, following a 9.8% increase in 2011. *(It is important to note the following charts do not include the portion of travel expenses incurred by visitors in getting to and from Pennsylvania, but is nonetheless attributable to PA, e.g., the portion of an airline visitor ticket accruing to PA airports, along with the PA portion of the ticket a traveler bought leaving the state. The following tables are based on traveler survey responses that do not capture this portion of transportation costs since the survey cannot break out where the airline ticket spending should apply.)*
- Per person trip spending rose marginally by 0.1%.
- Increases in the number of person-trips provided much of the increase behind the domestic spending increases in 2012.

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.
- The Overnight Leisure segment accounted for 31% of all person-trips, but a far higher share (48%) of PA's total domestic visitor spending.



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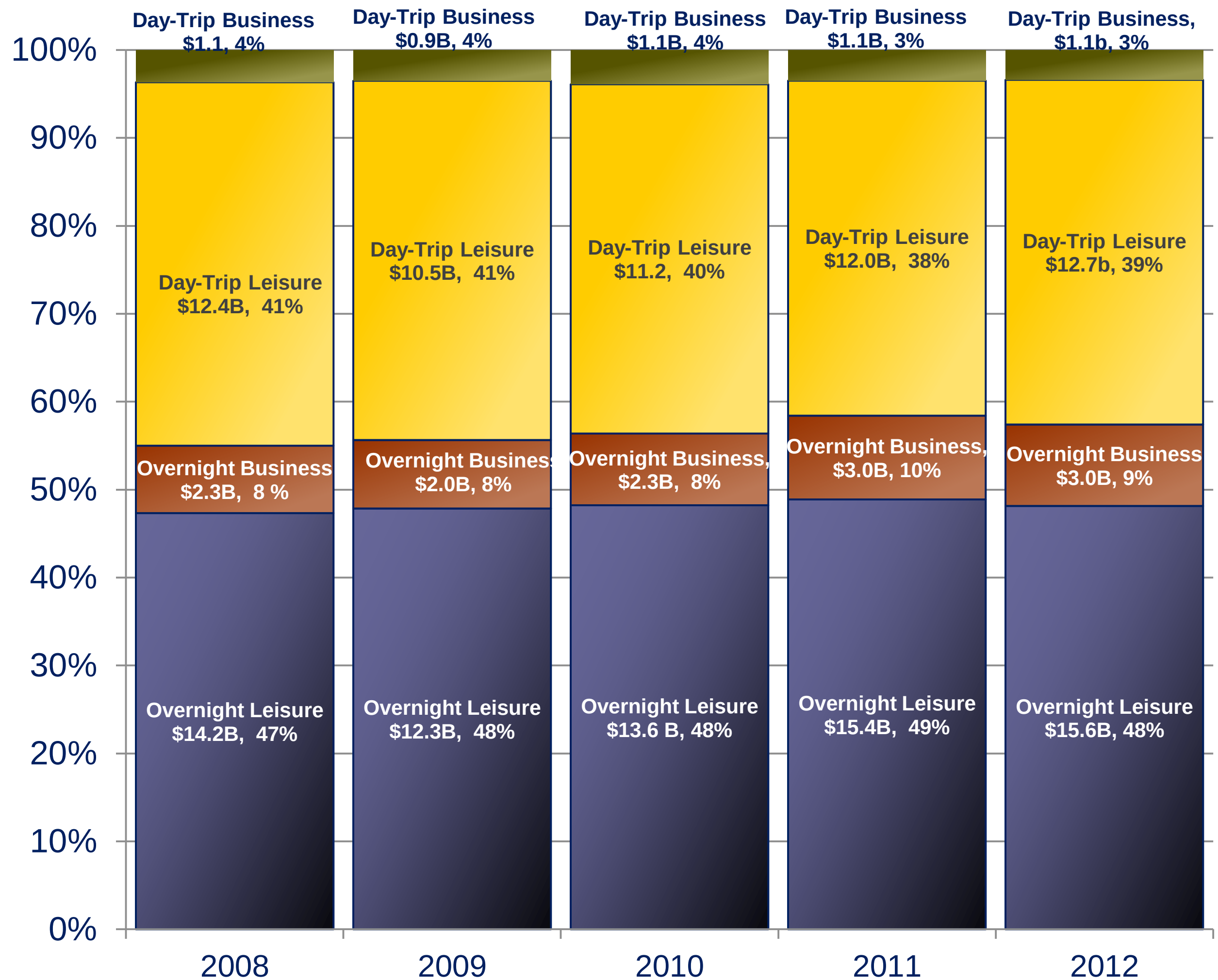
Domestic spending trends by trip type

- The share of day-trip visitor spending grew in 2012 – the first time since the recession ended.
- The shares of both overnight travel sectors fell slightly in 2012 – their first declines since the recession ended.
- More than 57% of PA domestic traveler spending was by overnight travelers in 2012.

Domestic traveler spending by trip type

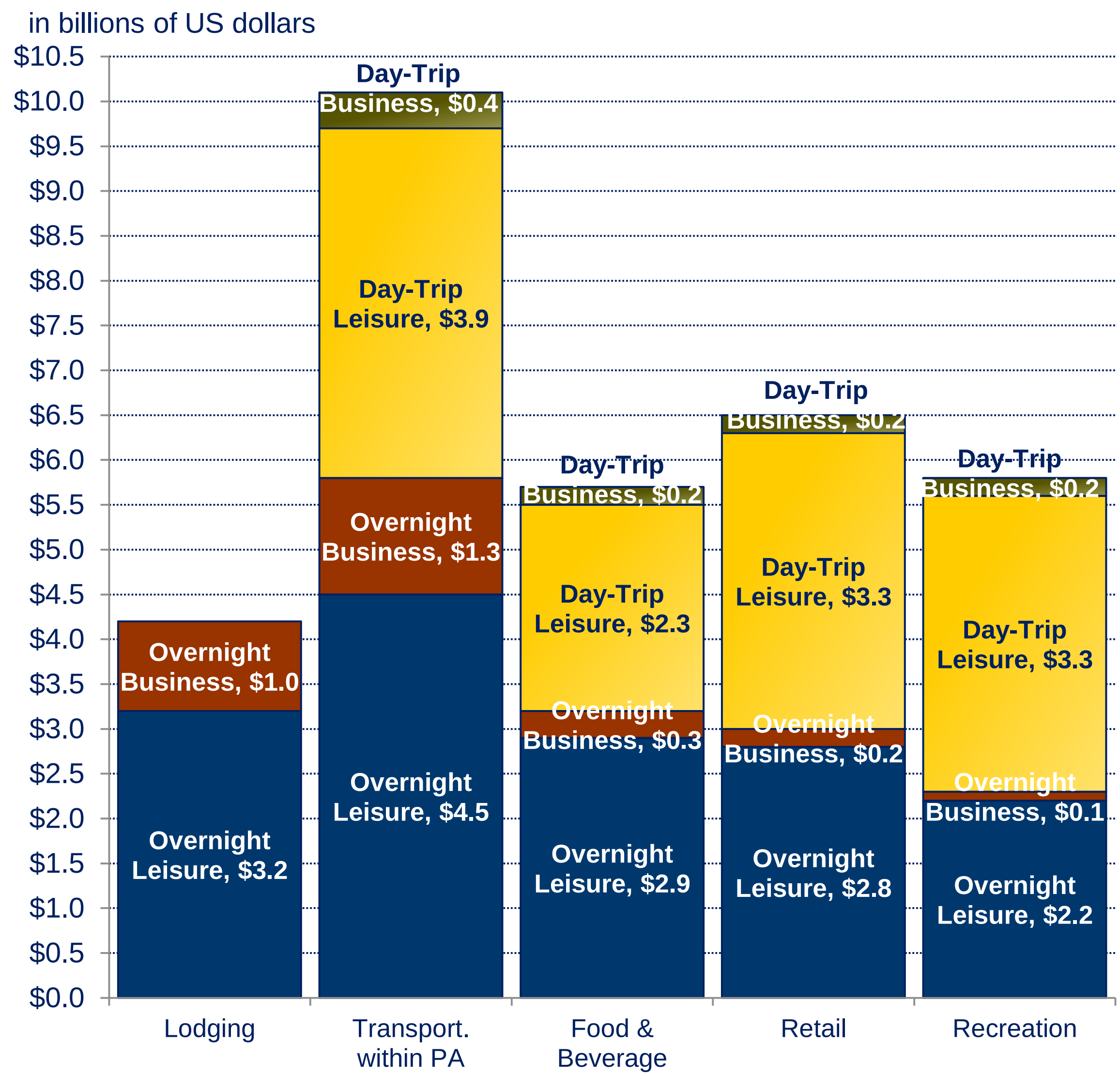
In billions of US dollars and as Percent of total spending



Source: Longwoods International

2012 domestic traveler spending by spending category and trip type

- Overnight leisure travelers accounted for 77% of PA's total domestic traveler 2012 spending on lodging – unchanged from 2011.
- Business overnight's 24% share of lodging spending was far higher than the segment's 9% share of PA's total overnight person-trips, with roughly a third of the segment's total trip dollars spent on lodging in 2012.
- Day-trip leisure visitors accounted for 57% of all domestic visitor spending on recreation in PA in 2012.



Source: Longwoods International

TOURISM ECONOMICS

Overnight leisure traveler spending by category

- Pennsylvania hosted an estimated 58.8 million domestic overnight leisure travelers in 2012 (as measured in person-trips).
- These visitors spent $15.6 billion in PA in 2012 – a slight increase from 2011.
- Each visitor spent an estimated $265 per trip – a small increase from the $263 per trip spend in 2011.
- Travelers spent proportionally more on lodging, transportation, and retail purchases than in 2011.

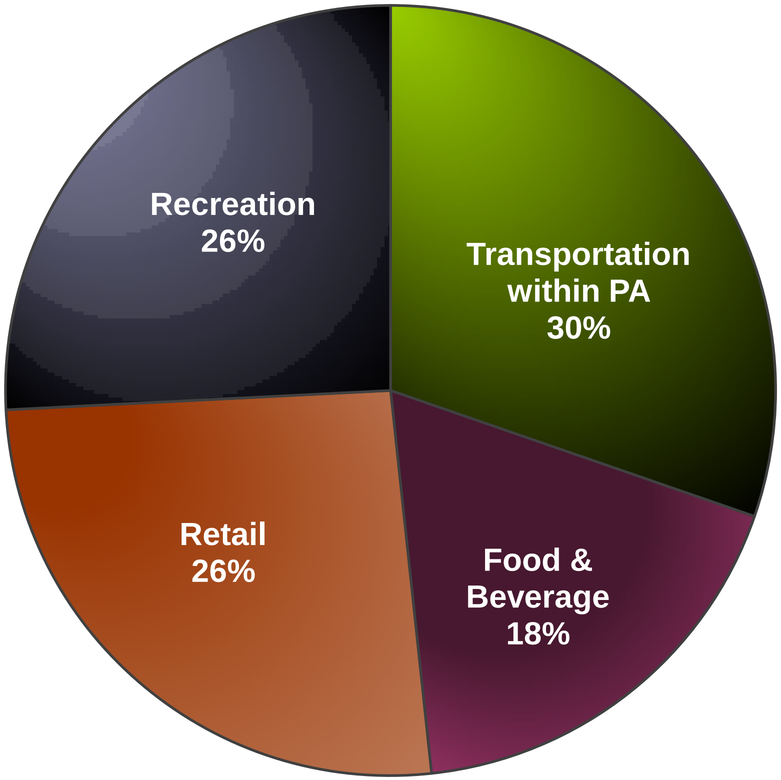
2012 Overnight Leisure Traveler Spending by Category

Source: Longwoods International

Day-trip leisure traveler spending by category

- PA hosted an estimated 114 million day-trip leisure travelers (as measured in person-trips) in 2012.
- These visitors spent an estimated $12.7 billion in PA in 2012.
- Each visitor spent an average of $111 per trip – a nearly 3% increase from 2011.
- Travelers spent proportionally more of their total day-trip expenditures on transportation, food & beverage, and retail purchases compared to 2011.

2012 Day-Trip Leisure Traveler Spending by Category

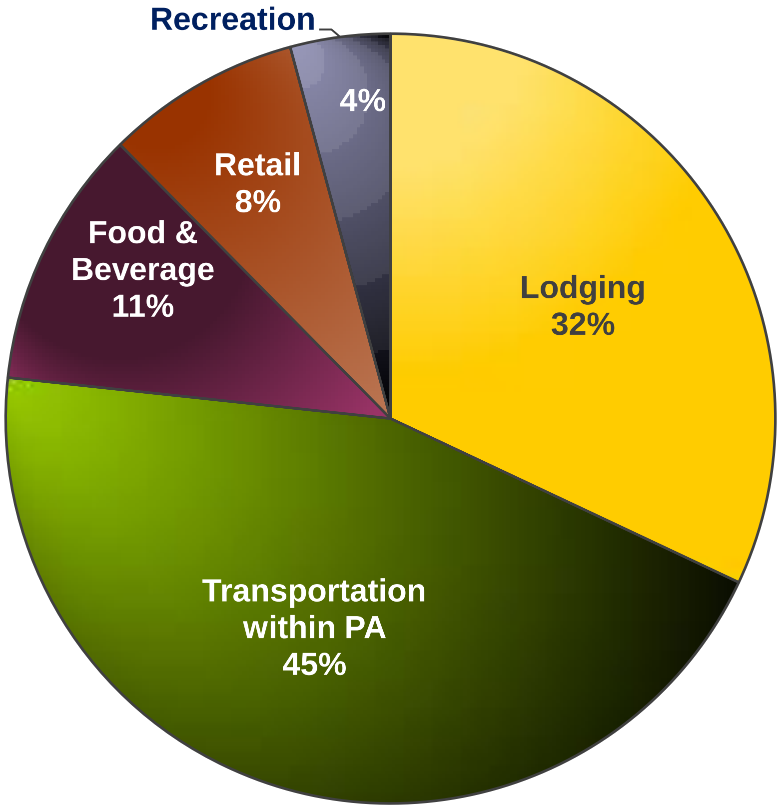


Source: Longwoods International

Overnight business traveler spending by category

- PA hosted an estimated 6.2 million domestic overnight business travelers in 2012 (as measured in person-trips).
- These visitors spent $3.0 billion in total in Pennsylvania in 2012 – essentially the same amount as in 2011.
- Each visitor spent an average of $485 per trip – the highest of any trip type, with transportation and lodging together accounting for over three quarters of their total trip expenditures.

2012 Domestic Overnight Business Traveler Spending by Category



Source: Longwoods International

Pennsylvania's Total Travel and Tourism Economy

- Tourism Satellite Account Measures
- Translating Sales into Impact

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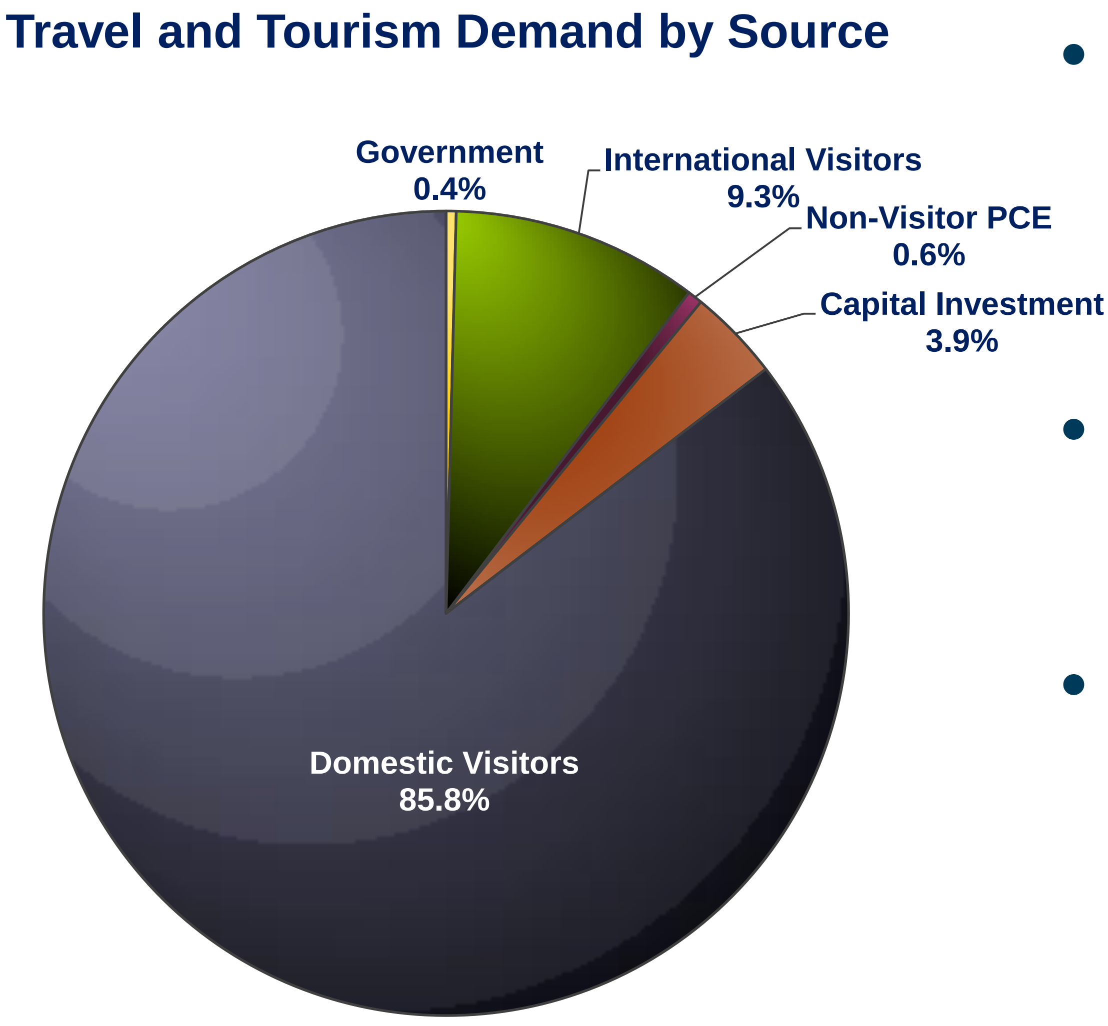
Tourism Satellite Account & total tourism demand

- The Tourism Satellite Account looks at a broader range of travel-related expenditures beyond visitor spending.

Tourism Satellite Account 2012 Spending (in billions of US dollars)						
	Domestic Traveler Spending	International Traveler Spending	Non-Visitor PCE	Government Support	Capital Investment (CAPEX)	Total*
2012	$34.7	$3.7	$0.2	$0.2	$1.5	$40.4
2011	$33.4	$3.6	$0.2	$0.2	$1.5	$39.0
2010	$30.6	$3.5	$0.2	$0.2	$1.4	$35.9
% Change	3.8%	3.4%	0.4%	4.7%	1.0%	3.6%

- Non-visitor private consumption expenditures (PCE) represent tourism consumer durable goods, such as an RV, boat, or furniture for a vacation home.
- Government support for travel and tourism includes the budget for the PA Tourism Office and the budgets of local tourism promotion agencies derived from the local room tax and other government support, tourism attractions, security, and other budget items in broad support of the travel and tourism industry.
- Capital investment (CAPEX) includes construction of hotels and attractions, as well as travel-related infrastructure and equipment.

Travel and tourism demand by source



- Domestic visitor markets comprised the majority (86%) of travel-related sales in PA in 2012 – a slight increase from 2010 and 2011.
- International visitor markets contributed 9.3% of PA travel-related sales in 2012, down from 9.9% in 2011.
- Capital investment in tourism-related construction and machinery & equipment represented 3.9% of travel economy sales in 2012 – up from 3.7% in 2011.

Capital investment in travel and tourism

Travel and Tourism Capital Investment (in millions of US dollars)					
	2008	2009	2010	2011	2012
Construction	$1,282	$619	$556	$654	$630
Machinery & Equipment	$ 808	$727	$796	$872	$912
Total	$2,089	$1,346	$1,353	$1,526	$1,542
% Change		-35.6%	0.5%	12.8%	1.0%

- More than $1.5 billion was invested by the travel sector in capital projects in 2012 – a modest 1% increase from 2011 that was well below 2011's (revised upward) nearly 13% growth in travel and tourism-related capital investment projects and remaining more than $0.5 billion below 2008's $2.1 billion record level of investment.

- Increases in investment by PA's amusement industry in 2012 offset most of the drop in investment in hotel/motel properties (which had experienced an exceptionally strong year of investment in 2011).

Sales to travelers and total economy impact

- The primary and direct impact of travel and tourism is driven by sales made to travelers. This allows for apples-to-apples comparisons with other industries.
- The total economy impact of travel and tourism includes capital investment in support of travel and tourism, government spending and non-visitor private consumption expenditures (PCE).

2012 PA Traveler Spending and Total Impact By Expenditure Category
(in millions of US dollars)

Industry	Total Visitor Spending	Total Economy Impact
Non-Air Transportation	$10,444.9	$10,444.9
Food and Beverage	$7,544.7	$7,544.7
Recreation	$6,378.4	$6,378.4
Shopping	$6,128.9	$6,128.9
Lodging	$4,974.5	$4,974.5
Air Transportation	$2,968.5	$2,968.5
Investment	$0	$1,542.1
Non-Visitor Personal Consumption Exp.	$0	$ 238.0
Government	$0	$ 164.7
Total	$38,439.9	$40,384.7

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 tourism-generated incomes spent within the state.

DIRECT TOURISM SALES

Industry
Includes:
Visitor spending
Resident spending
Government spending

Economy
Includes all of the above +
Capital investment
Government support of tourism

INDIRECT IMPACT

Supply chain impacts

INDUCED IMPACT

Spending of direct and indirect tourism employees

TOTAL IMPACT

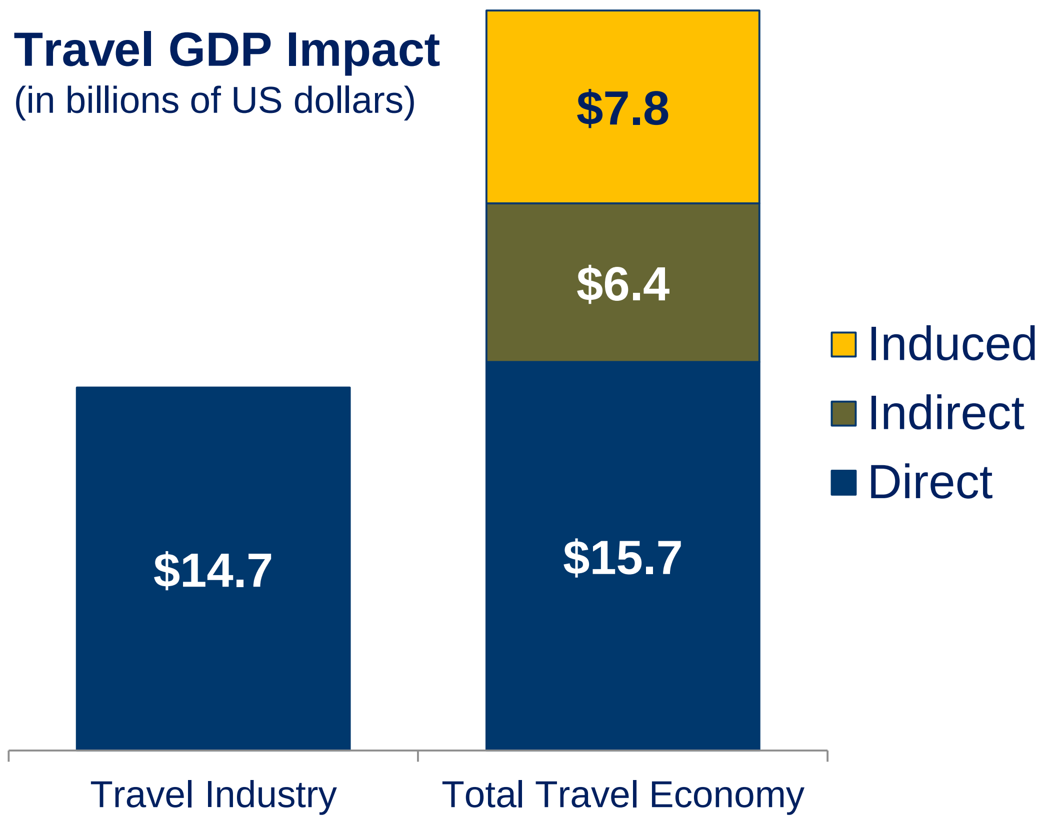
Sum of all impacts
- Sales
- Jobs
- Wages
- Taxes

IMPORT LEAKAGES

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.

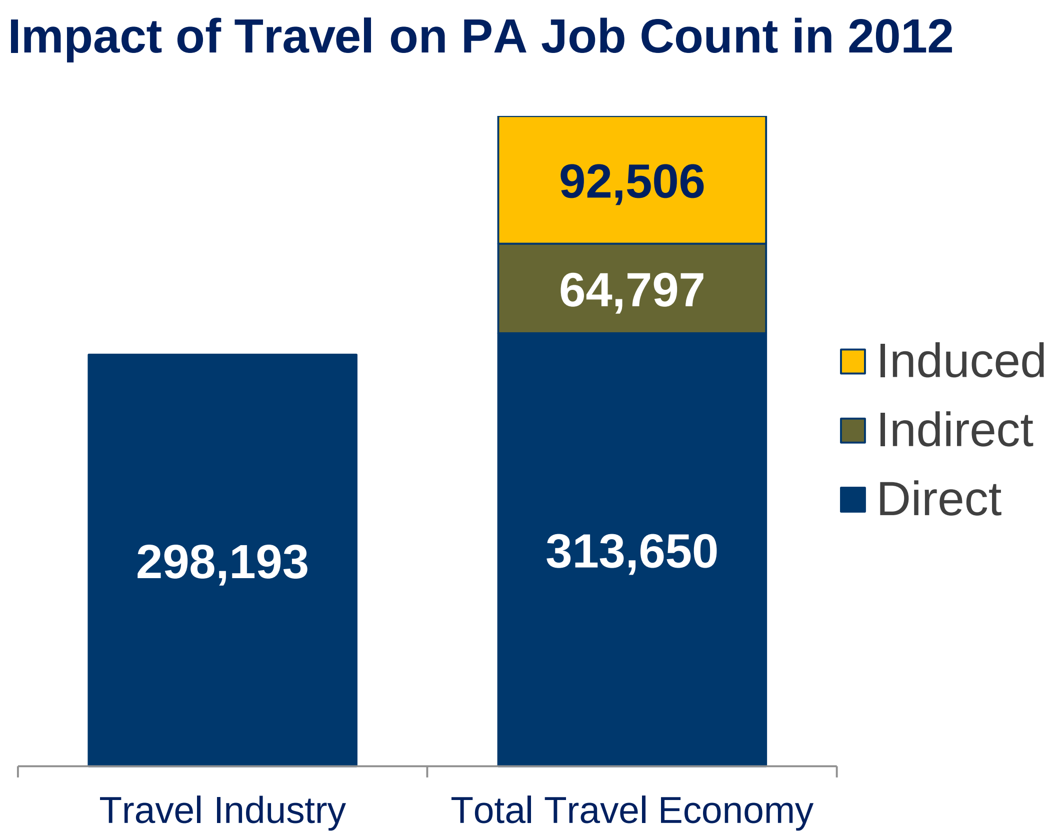
Impact of travel and tourism on PA's GDP

- Pennsylvania's travel and tourism industry directly generated nearly $14.7 billion to the state's gross domestic product (GDP) in 2012 – a 4.5% increase from 2011.
- The state's entire travel and tourism economy (including direct, indirect and induced impacts) generated $29.9 billion in GDP in 2012, or 5.0% of PA's economy.



Impact of travel and tourism on PA Jobs

- Traveler spending directly supported 298,193 jobs in Pennsylvania in 2012.
- The travel and tourism economy, including direct, indirect and induced impacts, supported 470,953 jobs in PA in 2012, or 6.5% of all jobs in the state.



TOURISM ECONOMICS

State Tourism Industry Impacts

(Direct Impacts)

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Travel and tourism industry impacts on GDP and jobs

2012 PA Travel and Tourism Spending Impacts (in millions of US dollars)		
Industry	**GDP (in millions)**	**Employment**
Agriculture, Fishing, Mining	--	--
Construction and Utilities	--	--
Manufacturing	--	--
Wholesale Trade	--	--
Air Transportation	$1,108	9,074
Non-Air Transportation	$1,891	24,713
Retail Trade	$1,389	34,193
Gasoline Stations	$529	8,063
Communications	--	--
Fire, Insurance, and Real Estate (FIRE)	$974	4,164
Business Services	--	--
Education and Health Care	--	--
Recreation and Entertainment	$2,182	44,483
Lodging	$2,900	51,717
Food & Beverage	$3,383	114,357
Personal Services	$315	7,429
Government	--	--
Total	$14,672	298,193
Percent Change	4.5%	2.3%

- Travel and tourism industry impacts include only the direct value of travel consumption and, as such, excludes capital investment and general government support of travel and tourism. This definition is consistent with national economic accounts.
- On this basis, PA's travel and tourism industry generated $14.7 billion for the state's gross domestic product in 2012, or 2.4% of the state's total GDP.
- Travel and tourism spending supported 298,193 jobs in 2012, or 4.1% of the state's total employment number – a small increase in the industry's share compared to 2011.

Why spending and GDP differ

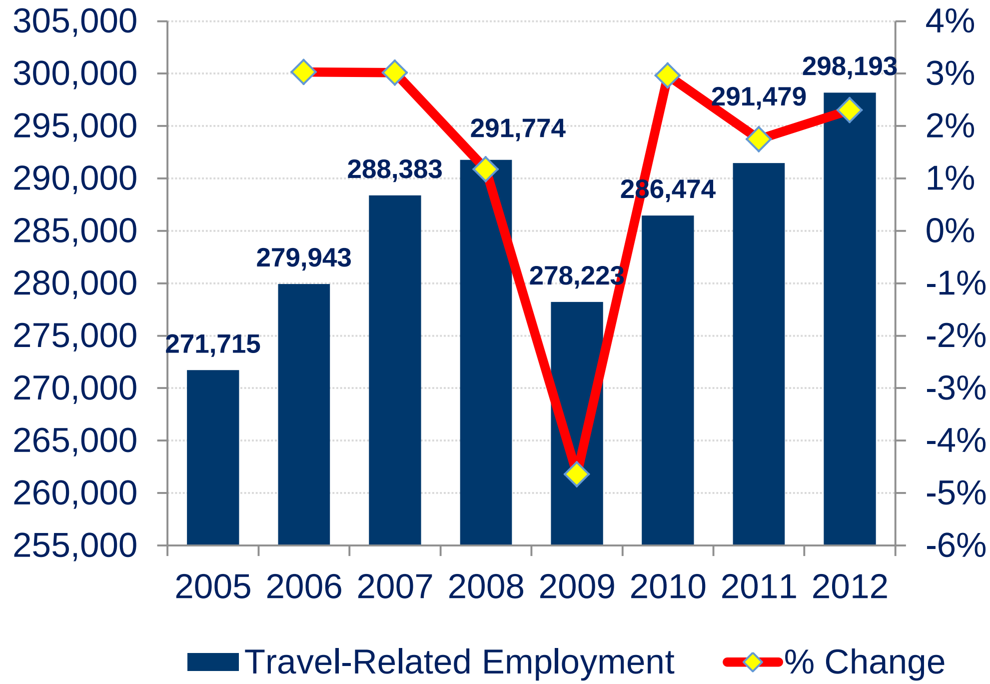
- Traveler spending in Pennsylvania equaled $38.4 billion in 2012, yet the industry's contribution to the state's Gross Domestic Product measured just $14.7 billion. Why are the figures so different?
- GDP (gross domestic product) is less than spending, or "sales," because GDP measures only the locally 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.

Because of these reasons, visitor spending (i.e., "sales" made to travelers) will always be higher than GDP.

Travel-related employment picked up in 2012

Travel-related Employment							
	2006	2007	2008	2009	2010	2011	2012
Employment	279,943	288,383	291,774	278,223	286,474	291,479	298,193
% Change	3.0%	3.0%	1.2%	-4.6%	3.0%	1.7%	2.3%

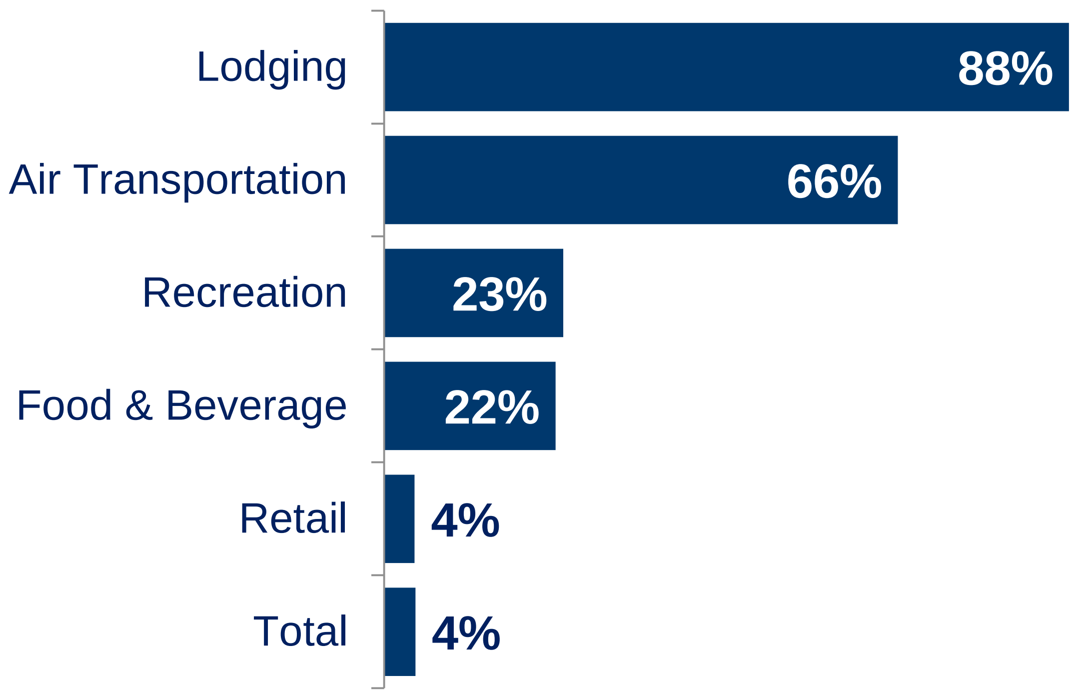
- The relatively strong growth in visitor spending in 2012 supported the 2.3% increase in travel-related employment.
- The 2.3% growth in the number of travel-related jobs in 2012 was nearly double PA's 1.2% increase in total employment.



Travel-related employment intensity by industry

- Travel and tourism represents a significant portion of employment in the lodging, air transportation, food & beverage, and recreation sectors, and roughly 4% of the state total.

Travel-Related Employment Intensity by Industry



Ranking travel-generated employment

- Travel and tourism is responsible for a portion of direct jobs reported for industries with official NAICS codes (e.g., accommodations, food & beverage, retail trade, transportation, etc.). Travel and tourism continued to rank as PA's 10th largest employer in 2012 with direct travel-related employment of 298,193.

Tourism-generated employment: 298,193

Employment Ranking - Private Sector State of Pennsylvania		
Rank	**Industry**	**2012**
1	Health care and social assistance	1,026,964
2	Retail trade	773,601
3	Manufacturing	593,957
4	Professional, scientific, and technical services	476,255
5	Accommodation and food services	466,319
6	Other services, except public administration	414,516
7	Finance and insurance	406,889
8	Administrative and waste management services	371,754
9	Construction	358,198
10	Educational services	276,935
11	Transportation and warehousing	266,329
12	Wholesale trade	250,277
13	Real estate and rental and leasing	248,200
14	Arts, entertainment, and recreation	161,646
15	Management of companies and enterprises	134,282

State Travel and Tourism Economy Impacts

(Direct, Indirect, and Induced Impacts)

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Travel economy – GDP impacts by industry

- Pennsylvania's travel and tourism industry generated close to $30 billion in total impact to the state's Gross Domestic Product (GDP) in 2012 -- a 4.7% increase.
- The following table shows the direct, indirect, and induced impact of travel and tourism on Pennsylvania's GDP for the various industry sectors.

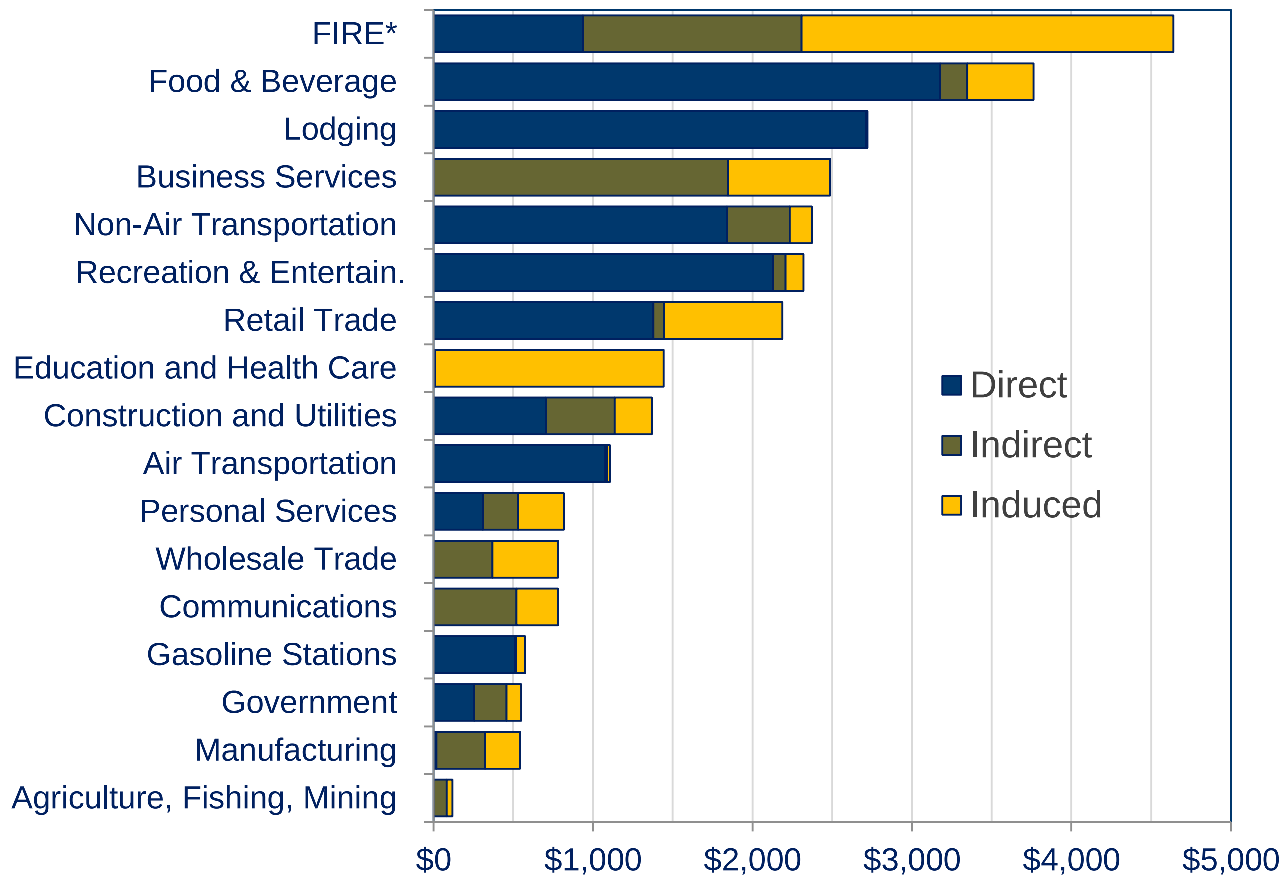
2012 PA Travel Economy GDP (*Value Added*)
(in millions of US dollars)

Industry	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	--	$81	$35	$116
Construction and Utilities	$717	443	239	1,399
Manufacturing	19	332	237	588
Wholesale Trade	--	392	438	829
Air Transportation	1,108	11	18	1,137
Non-Air Transportation	1,891	407	145	2,443
Retail Trade	1,424	69	772	2,265
Gasoline Stations	529	6	58	593
Communications	--	537	268	805
Fire, Insurance, and Real Estate (FIRE)	974	1,442	2,454	4,870
Business Services	--	1,989	690	2,680
Education and Health Care	--	10	1,477	1,487
Recreation and Entertainment	2,182	80	117	2,378
Lodging	2,900	6	6	2,912
Food & Beverage	3,383	186	448	4,017
Personal Services	315	226	293	835
Government	258	207	94	559
Total	$15,702	$6,422	$7,790	$29,914
Percent Change from 2010	4.3%	5.5%	4.8%	4.7%

Travel economy – GDP impacts by industry

- Including supply chain and income effects, travel and tourism benefits a broad spectrum of industries.
- Almost $2.4 billion of Pennsylvania's total GDP is generated by tourism activity in the recreation and entertainment sector.

2012 Travel Economy GDP Impact by Industry
(in millions of US dollars)



* FIRE – Finance, Insurance, Real Estate

Travel economy – employment impacts by industry

- Pennsylvania's travel and tourism industry supported 470,953 jobs in total, or 6.5% of PA's total employment in 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.

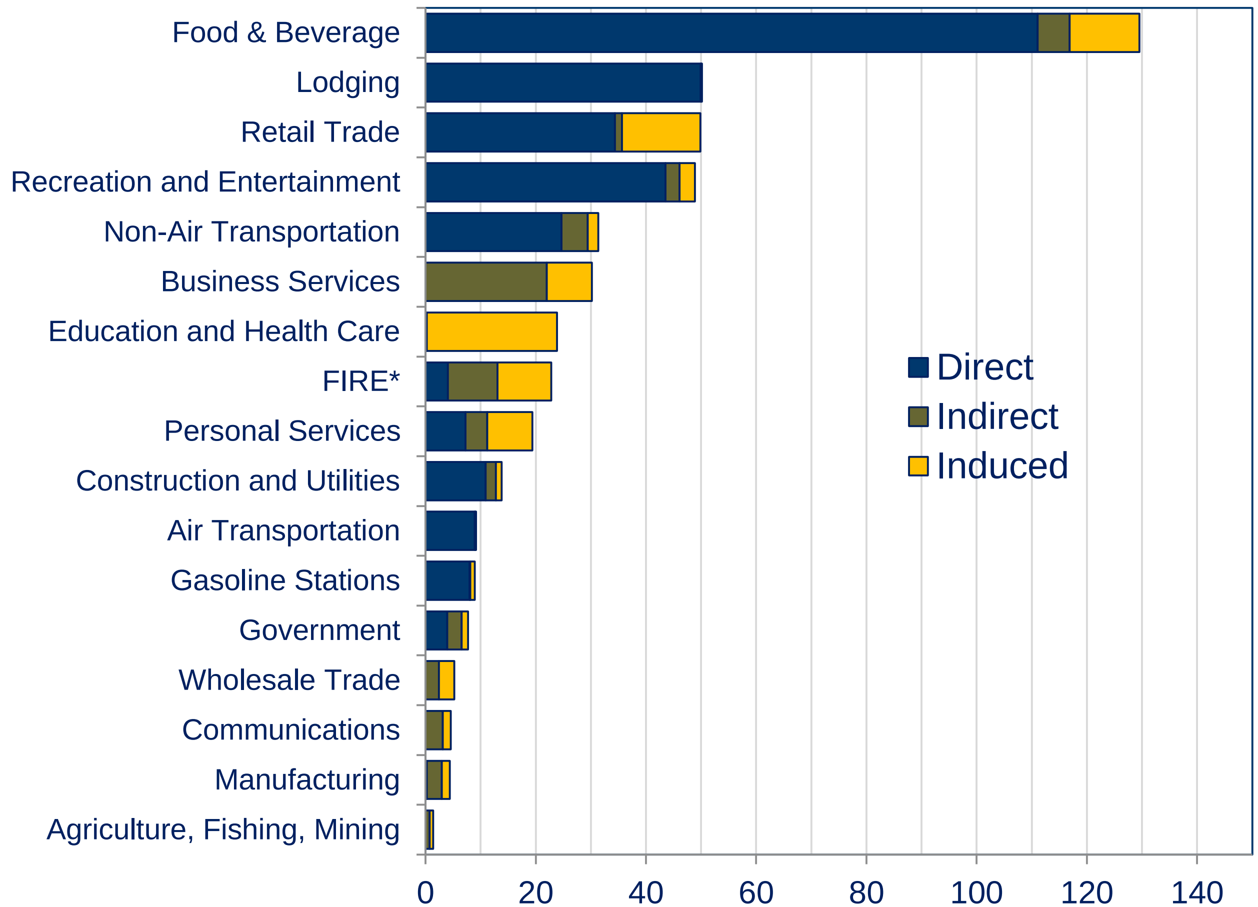
2012 PA Travel-Related Employment (*Value Added)*

Industry	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	--	798	641	1,440
Construction and Utilities	10,918	1,867	1,043	13,827
Manufacturing	249	2,749	1,441	4,438
Wholesale Trade	--	2,475	2,790	5,266
Air Transportation	9,074	88	148	9,310
Non-Air Transportation	24,713	4,813	1,951	31,478
Retail Trade	34,625	1,306	14,351	50,283
Gasoline Stations	8,063	93	837	8,993
Communications	--	3,141	1,465	4,606
Fire, Insurance, and Real Estate (FIRE)	4,164	9,232	9,965	23,361
Business Services	--	22,697	8,482	31,179
Education and Health Care	--	236	23,956	24,192
Recreation and Entertainment	44,483	2,594	2,837	49,915
Lodging	51,717	97	114	51,928
Food & Beverage	114,357	5,977	13,018	133,351
Personal Services	7,429	4,032	8,329	19,789
Government	3,858	2,602	1,137	7,597
Total	313,650	64,797	92,506	470,953
Percent Change from 2009	2.2%	2.2%	1.9%	2.1%

Travel economy – employment impacts by industry

- The restaurant, recreation, and lodging sectors employed the most persons in the travel and tourism sector.
- Secondary benefits are realized across the entire economy through the supply chain and business owner and employee incomes as they are spent.

2012 Total Travel Employment Impact by Industry (in thousands)



* FIRE – Finance, Insurance, Real Estate

Travel economy – labor income impacts by industry

Traveler spending generated nearly $18 billion in income for persons employed by PA businesses supported in some way by travel and tourism in 2012.

2012 PA Travel-Related Labor Income (Compensation)
(in millions of US dollars)

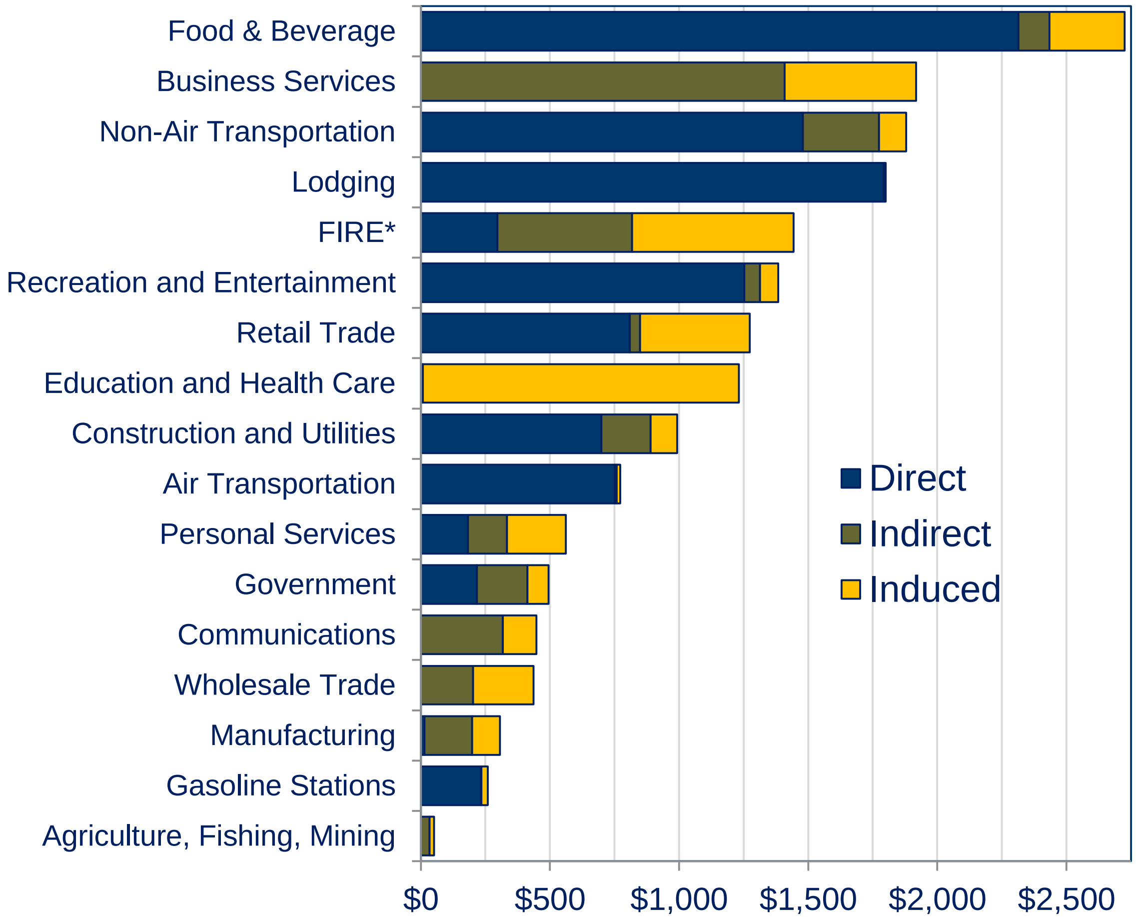
Industry	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	--	$33.9	$17.4	$51.2
Construction and Utilities	$699.8	190.3	102.5	992.5
Manufacturing	14.5	184.8	107.1	306.3
Wholesale Trade	--	202.0	234.3	436.3
Air Transportation	751.7	7.4	12.8	771.9
Non-Air Transportation	1,479.3	295.5	105.2	1,880.0
Retail Trade	809.9	38.7	425.7	1,274.3
Gasoline Stations	232.4	2.7	25.0	260.1
Communications	--	317.4	130.1	447.5
Fire, Insurance, and Real Estate (FIRE)	296.4	521.2	625.9	1,443.5
Business Services	--	1,409.5	507.9	1,917.4
Education and Health Care	--	8.1	1,224.3	1,232.4
Recreation and Entertainment	1,252.7	60.4	71.2	1,384.3
Lodging	1,793.3	2.9	3.7	1,799.9
Food & Beverage	2,313.8	120.7	291.6	2,726.1
Personal Services	183.2	150.7	228.2	562.1
Government	217.4	196.1	80.9	494.4
Total	$10,044.4	$3,742.3	$4,193.5	$17,980.3
Percent Change from 2009	3.8%	3.7%	3.6%	3.7%

Travel economy – labor income impacts by industry

- Traveler spending generated nearly $18 billion in labor income in 2012, with the direct impact led by traveler intensive industries, i.e., restaurants, lodging, and transportation.

- Employees of business service and finance, insurance & real estate (FIRE) companies also benefited substantially as suppliers to the tourism industry.

2012 Total Labor Income Impact by Industry
(in millions of US dollars)



Travel economy – tax generation

- Travelers were responsible for more than $4 billion in state and local tax revenues and an additional $4 billion in federal taxes in 2012.
- Pennsylvania's state and local governments would have to tax each PA household an additional $810 per year to replace the taxes generated by travel and tourism.

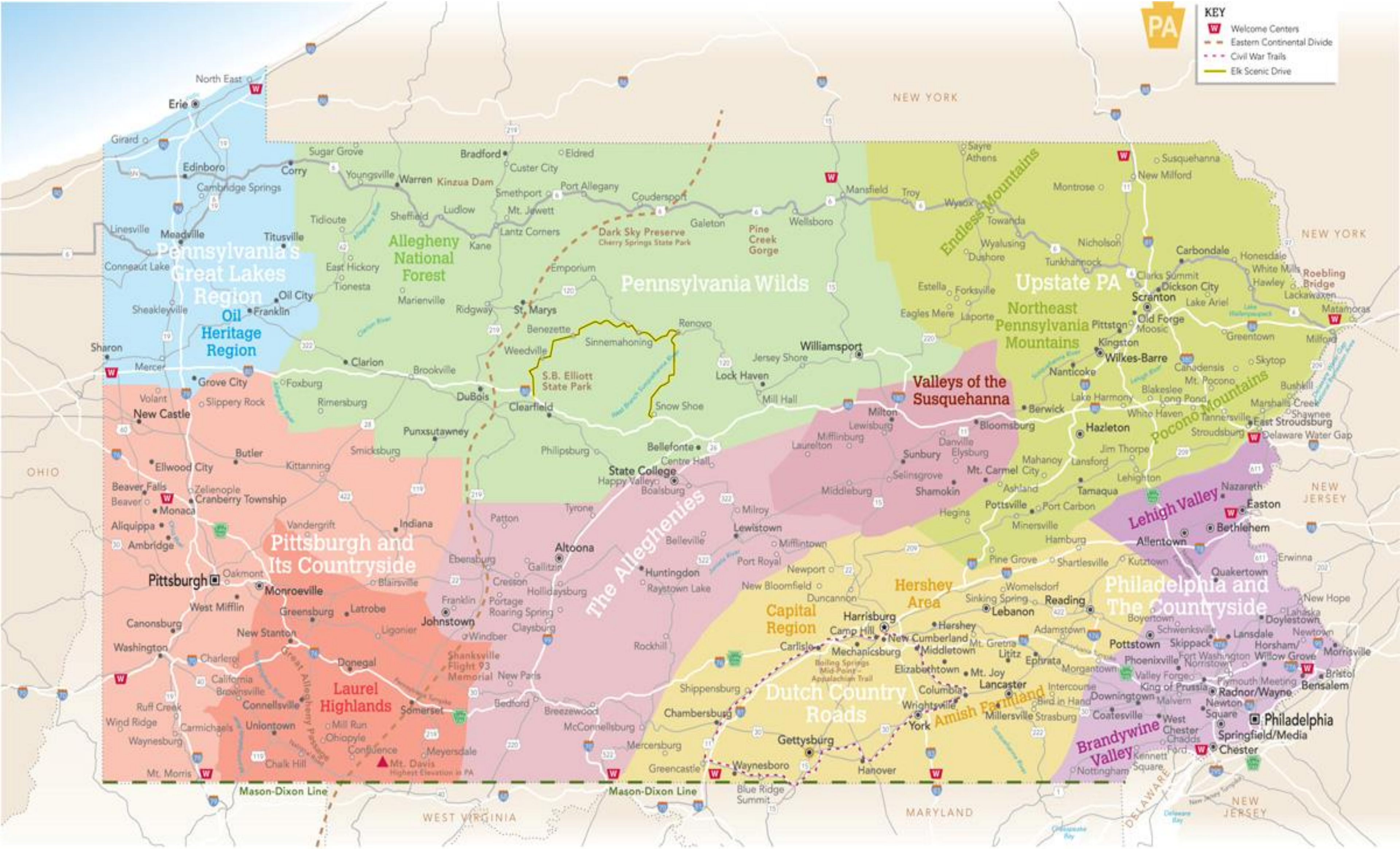
2012 Traveler-Generated Taxes
(in millions of US dollars)

Tax Type	2009	2010	2011	2012	% Change
Federal Taxes	**$3,505.1**	**$3,681.6**	**$3,856.4**	**$4,007.8**	**3.9%**
Corporate	349.2	369.5	387.1	405.3	4.7%
Indirect Business	332.3	351.6	368.3	385.7	4.7%
Personal Income	1,035.3	1,085.5	1,137.0	1,179.5	3.7%
Social Security	1,788.3	1,875.0	1,964.0	2,037.3	3.7%
State and Local Taxes	**$3,378.5**	**$3,572.6**	**$3,799.2**	**$4,023.6**	**5.9%**
Corporate	214.7	235.9	250.5	265.9	6.2%
Personal Income	325.1	340.8	357.0	370.3	3.7%
Sales	1,199.7	1,316.7	1,441.5	1,507.6	4.6%
Hotel Occupancy	112.2	121.7	133.1	143.6	7.9%
Property	1,030.2	1,032.3	1,066.9	1,155.6	8.3%
Excise and Fees	468.3	495.6	519.1	548.3	5.6%
PA Unemployment	28.3	29.6	31.1	32.2	3.7%
TOTAL	**$6,883.5**	**$7,254.3**	**$7,655.7**	**$8,031.4**	**4.9%**

Pennsylvania's Tourism Regions

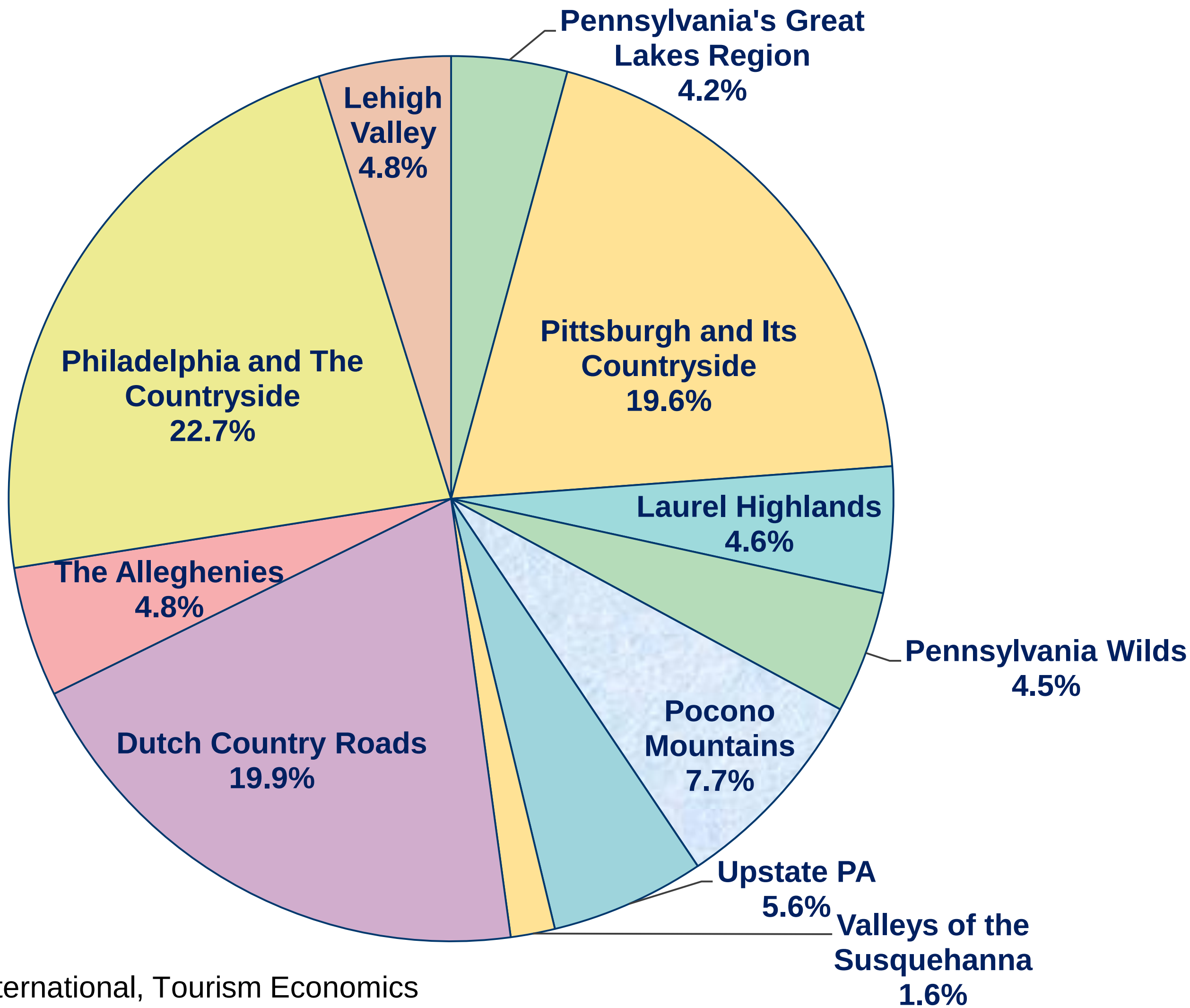
2012 Traveler Spending and Economic Impact
By Region and County

2012 Traveler spending and economic impact



Regional Spending Shares

Share of Total 2012 Visitor Spending in PA by Region

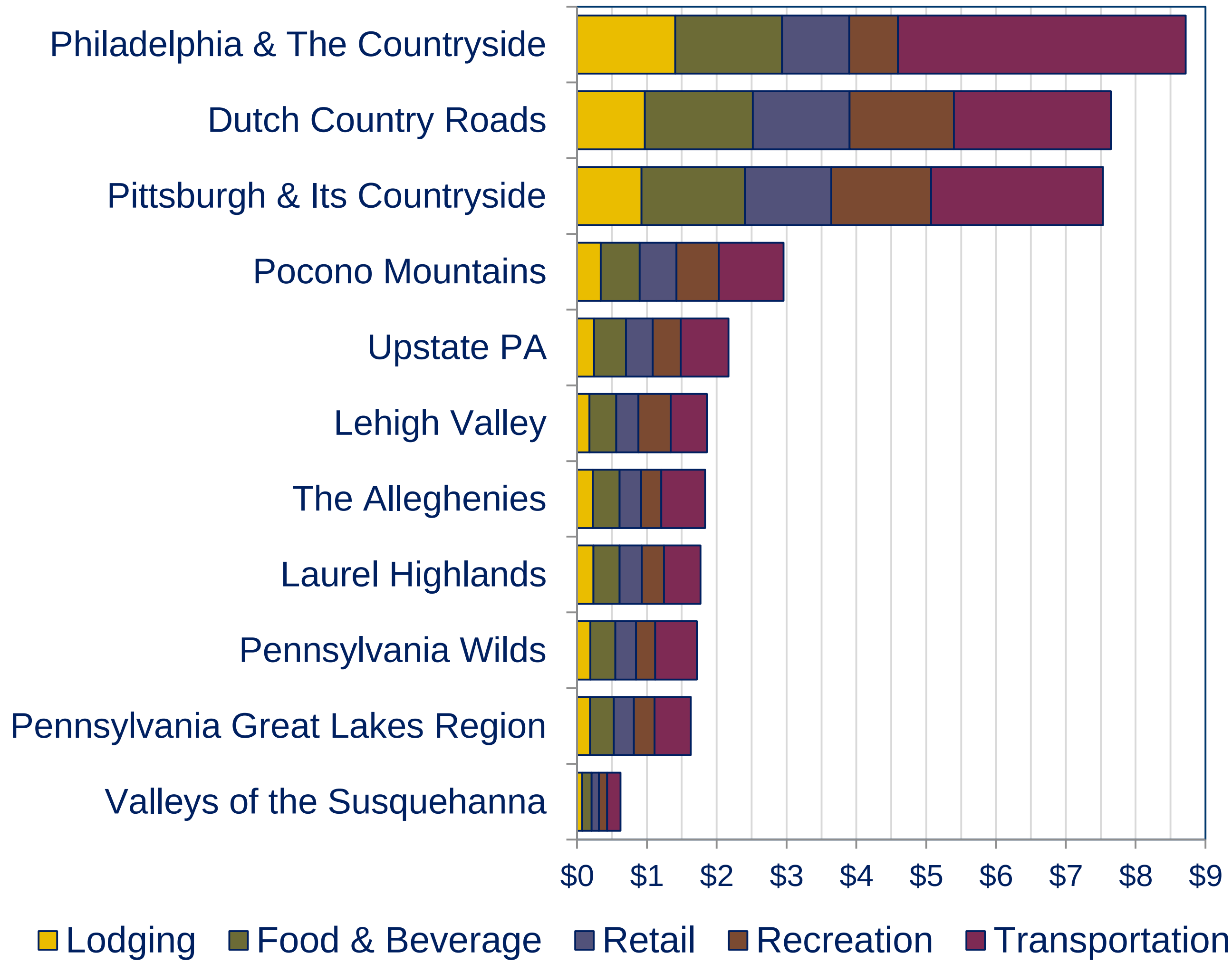


Source: Longwoods International, Tourism Economics

2012 Regional spending by category

- As in 2011, travelers to the Dutch Country Roads and Pittsburgh regions spent far more on recreation in 2012 than travelers to other regions when measured in dollar terms.
- Travelers to the Pittsburgh, Philadelphia, and Dutch County Roads regions spent more of their travel dollars on transportation than travelers to other regions.

Traveler Spending by Category and Region
(in billions of US dollars)

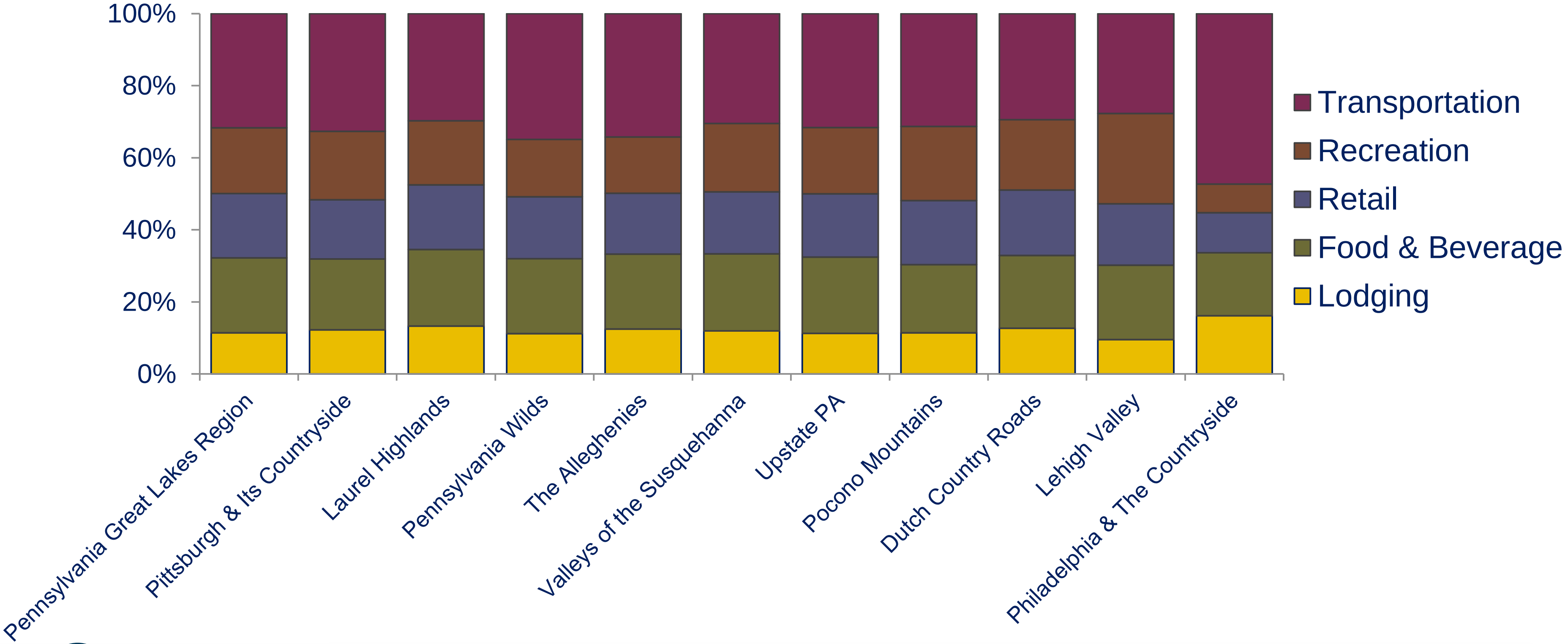


PA spending by category -- % of region total

- While travelers to the Dutch Country Roads and Pittsburgh regions spent more on recreation when measured in dollar terms, travelers to the Lehigh Valley and Pocono Mountains regions devoted proportionally more of their travel budget to recreation in comparison to the other tourism regions.

2012 Traveler Spending by Category and Region

Percent of Region Total



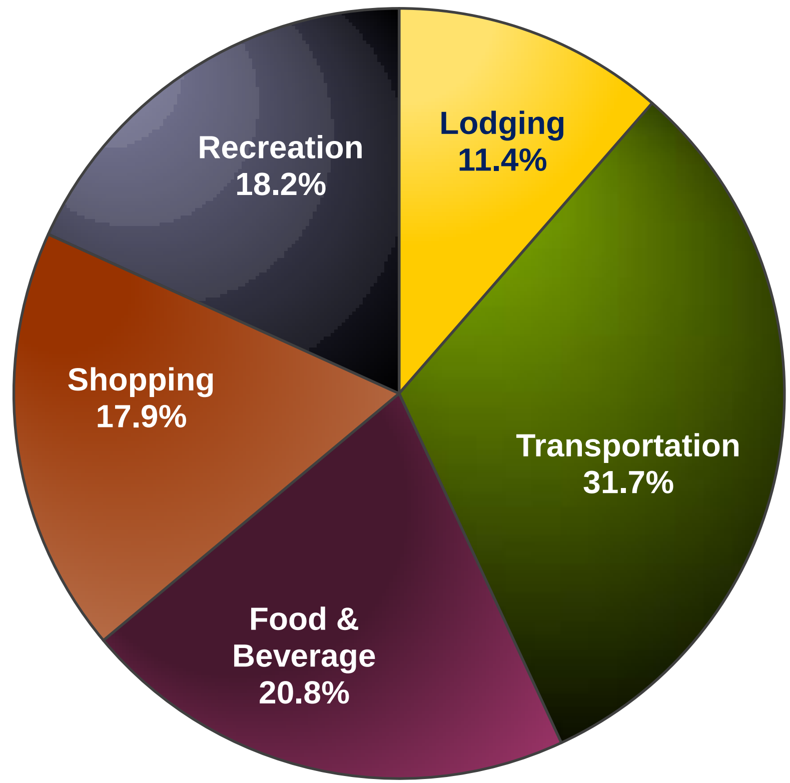
Total travel economy employment & intensity

- Travel Employment Intensity is the measure of each county's dependence on the travel industry for jobs.
- The Laurel Highlands and Pocono Mountains regions are the most dependent of all PA tourism regions on the travel industry as a job provider.
- The Philadelphia region has the highest number of travel-related jobs, but the region's highly diverse economic base makes the region the least dependent on travel.

Pennsylvania's Great Lakes Region

- Pennsylvania's Great Lakes region is comprised of Crawford, Erie, Mercer and Venango counties.
- Travelers spent nearly $1.63 billion in the region in 2012 – a 4.9% increase from 2011's spending level.
- The region had the 3rd highest proportion of its travel and tourism dollars derived from shopping among Pennsylvania's 11 tourism regions in 2012.

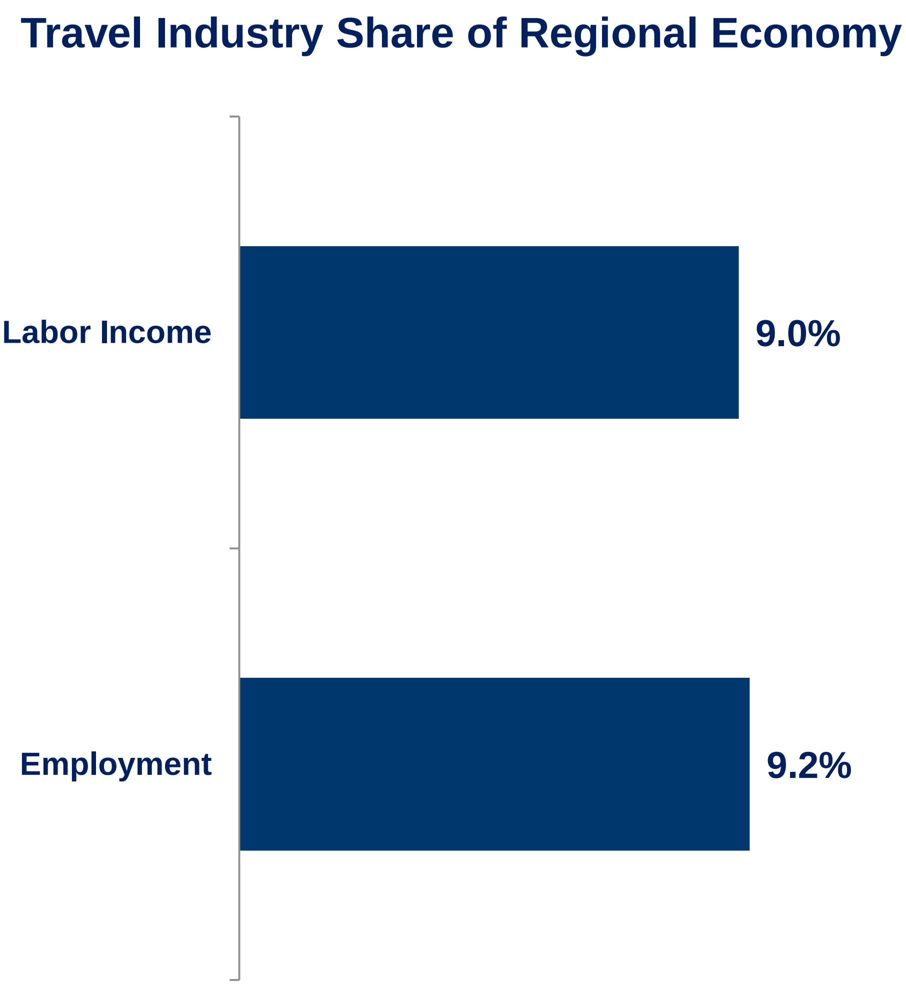
Pennsylvania's Great Lakes Region 2012 Spending by Category



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 labor income share for the region was 9.0% in 2012.
- The region ranked 9th in the number of travel-supported jobs among PA's 11 tourism regions in 2012, but ranked 6th in employment intensity.



Pennsylvania's Great Lakes Timeline

Tourism Industry Spending (Millions of dollars)								
County	2005	2006	2007	2008	2009	2010	2011	2012
Crawford	259.7	260.0	258.4	274.9	219.7	241.5	250.8	260.3
Erie	726.9	733.7	778.8	876.0	741.2	829.4	897.4	930.7
Mercer	240.8	241.1	243.2	279.8	233.2	256.0	279.7	304.9
Venango	119.2	116.1	118.7	130.2	108.7	118.3	124.0	132.1
Great Lakes	1,346.6	1,350.9	1,399.0	1,560.8	1,302.7	1,445.2	1,551.8	1,628.1
Percent Change		0.3%	3.6%	11.6%	-16.5%	10.9%	7.4%	4.9%

Tourism Industry Employment Impacts								
County	2005	2006	2007	2008	2009	2010	2011	2012
Crawford	2,224	2,254	2,261	2,237	2,091	2,160	2,171	2,122
Erie	7,134	7,150	7,114	7,095	6,674	7,004	7,181	7,347
Mercer	2,574	2,571	2,537	2,513	2,343	2,417	2,485	2,557
Venango	1,108	1,146	1,171	1,191	1,113	1,138	1,153	1,143
Great Lakes	13,040	13,121	13,084	13,036	12,221	12,719	12,989	13,169
Percent Change		0.6%	-0.3%	-0.4%	-6.3%	4.1%	2.1%	1.4%

Tourism Direct Sales – Tourism Industry

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2012						
Crawford	18.5	58.8	47.6	41.4	94.0	260.3
Erie	115.8	189.4	159.0	187.9	278.7	930.7
Mercer	39.6	67.5	62.9	50.6	84.4	304.9
Venango	11.8	23.6	21.3	16.6	58.7	132.1
Great Lakes	185.7	339.3	290.8	296.6	515.8	1,628.1
Percent Change	3.4%	2.1%	5.0%	2.7%	8.7%	4.9%
2011						
Crawford	18.0	57.3	46.8	40.0	88.7	250.8
Erie	113.6	187.2	152.6	185.2	258.7	897.4
Mercer	35.8	63.3	56.6	46.4	77.5	279.7
Venango	12.2	24.4	20.9	17.2	49.4	124.0
Great Lakes	179.6	332.3	276.9	288.8	474.3	1,551.8

Pennsylvania's Great Lakes TSA Spending

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2012				
Crawford	260.3	1.0	12.1	273.4
Erie	930.7	5.9	43.1	979.7
Mercer	304.9	1.5	14.1	320.6
Venango	132.1	0.6	6.1	138.8
Great Lakes	1,628.1	9.0	75.4	1,712.5
Percent Change	4.9%	0.7%	1.2%	4.7%
2011				
Crawford	250.8	1.0	12.0	263.9
Erie	897.4	5.9	43.1	946.3
Mercer	279.7	1.5	13.4	294.6
Venango	124.0	0.6	6.0	130.5
Great Lakes	1,551.8	9.0	74.5	1,635.3

Pennsylvania's Great Lakes Impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State &	Federal
2012					
Crawford	260.3	2,122	48.2	13.6	11.6
Erie	930.7	7,347	181.5	52.0	43.0
Mercer	304.9	2,557	53.0	15.9	13.1
Venango	132.1	1,143	28.0	7.4	6.4
Great Lakes	1,628.1	13,169	310.7	88.9	74.2
Percent Change	4.9%	1.4%	4.2%	6.9%	4.9%
2011					
Crawford	250.8	2,171	48.4	13.0	11.4
Erie	897.4	7,181	171.7	48.9	40.9
Mercer	279.7	2,485	50.5	14.4	12.3
Venango	124.0	1,153	27.7	6.9	6.2
Great Lakes	1,551.8	12,989	298.2	83.2	70.7

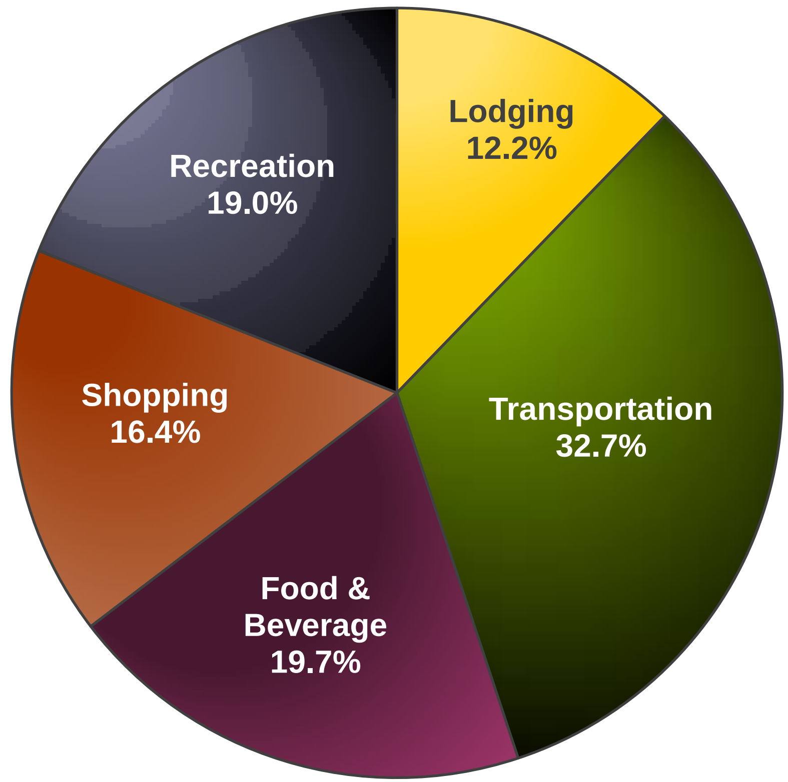
Pennsylvania's Great Lakes Impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2012					
Crawford	273.4	3,370	103.3	24.2	23.4
Erie	979.7	11,366	366.2	90.4	86.5
Mercer	320.6	4,017	114.8	27.8	26.4
Venango	138.8	1,829	59.3	13.1	13.0
Great Lakes	1,712.5	20,582	643.6	155.4	149.3
Percent Change	4.7%	1.0%	2.8%	6.9%	4.8%
2011					
Crawford	263.9	3,435	103.7	23.0	23.0
Erie	946.3	11,168	352.3	84.9	82.3
Mercer	294.6	3,930	111.2	25.3	24.7
Venango	130.5	1,843	58.9	12.2	12.5
Great Lakes	1,635.3	20,376	626.1	145.4	142.4

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 more than $7.5 billion in the region in 2012 - a nearly 7% increase from 2011, which was the strongest increase of PA's 11 tourism regions.
- As in 2010 and 2011, the region had the third highest level of traveler spending behind Philadelphia and The Countryside and the Dutch Country Roads regions.

Pittsburgh and Its Countryside Region 2012 Spending by Category

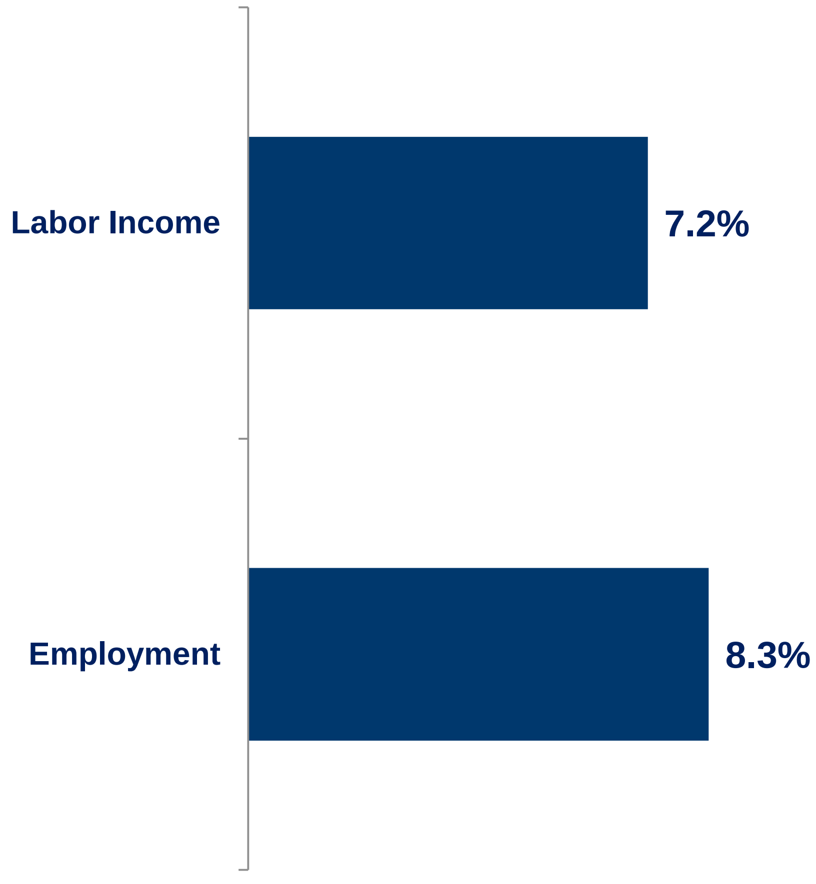


Source: Tourism Economics

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 labor income share for the Pittsburgh region was 7.2% in 2012, while the industry's share of the region's employment base was higher at 8.3%.
- The region had the 3rd highest number of travel-supported jobs of PA's 11 tourism regions, but ranked 7th for travel industry employment intensity in 2012.

Travel Industry Share of Regional Economy



Tourism Timeline – Pittsburgh & Its Countryside

Tourism Industry Spending (Millions of dollars)								
County	2005	2006	2007	2008	2009	2010	2011	2012
Allegheny	4,010.2	4,096.5	4,360.9	4,979.8	4,354.6	4,828.1	5,231.2	5,494.0
Armstrong	67.1	68.3	71.2	75.3	58.6	71.3	84.0	89.8
Beaver	189.9	185.0	197.6	226.9	196.0	217.2	237.4	244.9
Butler	367.2	377.9	406.5	455.5	406.1	440.6	485.7	578.8
Greene	58.5	56.4	60.8	65.3	58.7	68.9	74.6	80.4
Indiana	129.5	124.7	135.3	152.6	144.5	154.2	169.7	184.3
Lawrence	89.0	92.0	95.0	101.4	83.7	98.6	113.4	118.9
Washington	404.7	415.0	451.2	497.1	482.3	582.7	668.4	740.7
Pittsburgh and Its Countryside	5,316.3	5,415.8	5,778.4	6,554.1	5,784.5	6,461.7	7,064.4	7,531.8
Percent Change		1.9%	6.7%	13.4%	-11.7%	11.7%	9.3%	6.6%

Tourism Industry Employment Impacts								
County	2005	2006	2007	2008	2009	2010	2011	2012
Allegheny	35,655	35,650	36,767	37,591	36,188	37,302	38,112	39,094
Armstrong	532	525	517	530	484	554	559	568
Beaver	2,121	2,106	2,125	2,109	1,977	1,965	1,975	1,997
Butler	3,624	3,708	3,789	3,739	3,664	3,740	3,828	3,941
Greene	391	400	410	417	419	479	479	483
Indiana	1,296	1,297	1,320	1,342	1,347	1,351	1,381	1,427
Lawrence	831	842	854	863	806	873	877	896
Washington	4,625	4,824	4,877	4,995	5,026	5,570	5,740	5,840
Pittsburgh and Its Countryside	49,075	49,353	50,658	51,586	49,911	51,834	52,952	54,246
Percent Change		0.6%	2.6%	1.8%	-3.2%	3.9%	2.2%	2.4%

Tourism Direct Sales – Pittsburgh & Its Countryside

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2012						
Allegheny	694.3	1,075.1	890.4	1,029.9	1,804.4	5,494.0
Armstrong	3.7	16.0	13.1	25.1	31.9	89.8
Beaver	16.9	50.7	41.5	38.8	97.0	244.9
Butler	72.5	118.1	101.1	90.8	196.3	578.8
Greene	10.6	17.5	13.5	12.4	26.4	80.4
Indiana	24.0	40.9	34.1	30.2	55.1	184.3
Lawrence	7.3	25.7	24.1	22.4	39.4	118.9
Washington	91.8	140.9	117.0	180.2	210.9	740.7
Pittsburgh and Its Countryside	921.1	1,484.9	1,234.8	1,429.7	2,461.3	7,531.8
Percent Change	6.2%	3.5%	8.1%	5.8%	8.5%	6.6%
2011						
Allegheny	668.7	1,047.3	832.4	982.7	1,700.0	5,231.2
Armstrong	3.3	16.4	12.9	20.4	31.0	84.0
Beaver	17.5	50.1	39.5	37.8	92.5	237.4
Butler	61.3	106.7	87.0	79.8	150.9	485.7
Greene	9.4	16.9	12.5	11.7	24.1	74.6
Indiana	21.9	38.8	30.3	28.6	50.1	169.7
Lawrence	7.1	25.2	23.0	21.4	36.7	113.4
Washington	78.1	133.0	104.6	168.6	184.0	668.4
Pittsburgh and Its Countryside	867.3	1,434.5	1,142.3	1,351.1	2,269.2	7,064.4

Pittsburgh & Its Countryside TSA Spending

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2012				
Allegheny	5,494.0	41.8	254.4	5,790.2
Armstrong	89.8	0.3	4.2	94.3
Beaver	244.9	1.0	11.3	257.3
Butler	578.8	2.8	26.8	608.3
Greene	80.4	0.4	3.7	84.5
Indiana	184.3	0.9	8.5	193.7
Lawrence	118.9	0.4	5.5	124.9
Washington	740.7	3.4	34.3	778.5
Pittsburgh and Its Countryside	7,531.8	51.1	348.8	7,931.7
Percent Change	6.6%	1.3%	2.8%	6.4%
2011				
Allegheny	5,231.2	41.6	251.2	5,524.0
Armstrong	84.0	0.3	4.0	88.4
Beaver	237.4	1.0	11.4	249.8
Butler	485.7	2.5	23.3	511.6
Greene	74.6	0.4	3.6	78.6
Indiana	169.7	0.9	8.1	178.7
Lawrence	113.4	0.4	5.4	119.3
Washington	668.4	3.3	32.1	703.8
Pittsburgh and Its Countryside	7,064.4	50.4	339.3	7,454.2

Pittsburgh & Its Countryside Impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State &	Federal
2012					
Allegheny	5,494.0	39,094	1,307.1	339.9	285.5
Armstrong	89.8	568	13.0	4.4	3.6
Beaver	244.9	1,997	53.3	13.7	12.1
Butler	578.8	3,941	98.2	29.8	24.5
Greene	80.4	483	10.5	3.9	3.0
Indiana	184.3	1,427	30.2	9.5	7.7
Lawrence	118.9	896	21.1	6.1	5.2
Washington	740.7	5,840	164.6	42.5	37.1
Pittsburgh and Its Countryside	7,531.8	54,246	1,698.0	449.9	378.5
Percent Change	6.6%	2.4%	4.1%	7.5%	5.1%
2011					
Allegheny	5,231.2	38,112	1,261.7	320.0	274.2
Armstrong	84.0	559	12.2	3.9	3.3
Beaver	237.4	1,975	51.3	12.9	11.6
Butler	485.7	3,828	90.5	25.5	21.7
Greene	74.6	479	9.7	3.5	2.7
Indiana	169.7	1,381	29.5	8.7	7.3
Lawrence	113.4	877	20.2	5.7	4.9
Washington	668.4	5,740	156.5	38.0	34.3
Pittsburgh and Its Countryside	7,064.4	52,952	1,631.5	418.3	360.1

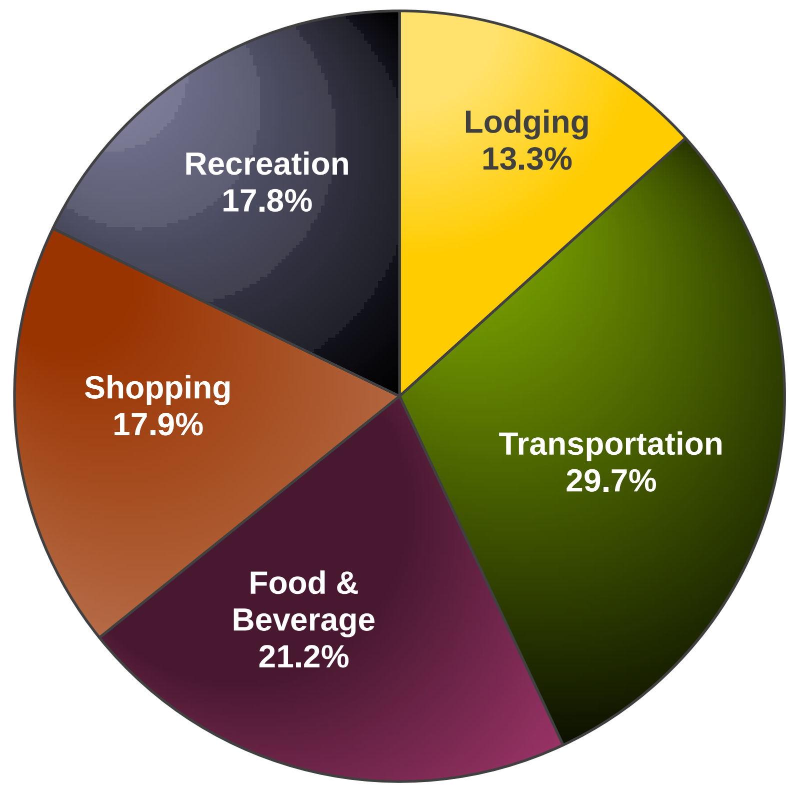
Pittsburgh & Its Countryside Impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2012					
Allegheny	5,790.2	58,727	2,388.1	585.0	575.5
Armstrong	94.3	1,134	38.2	7.8	7.2
Beaver	257.3	3,504	124.1	24.2	24.3
Butler	608.3	6,219	203.1	52.1	49.2
Greene	84.5	866	27.2	6.8	6.0
Indiana	193.7	2,357	70.1	16.7	15.5
Lawrence	124.9	1,661	55.2	10.8	10.4
Washington	778.5	8,927	317.2	74.8	74.6
Pittsburgh and Its Countryside	7,931.7	83,394	3,223.1	778.3	762.7
Percent Change	6.4%	1.9%	3.0%	7.5%	5.1%
2011					
Allegheny	5,524.0	57,547	2,325.7	550.8	552.9
Armstrong	88.4	1,125	36.9	7.0	6.6
Beaver	249.8	3,479	121.2	22.9	23.4
Butler	511.6	6,082	191.9	44.7	43.7
Greene	78.6	861	26.1	6.1	5.5
Indiana	178.7	2,301	69.1	15.2	14.6
Lawrence	119.3	1,638	54.1	10.1	9.9
Washington	703.8	8,811	305.6	67.1	69.2
Pittsburgh and Its Countryside	7,454.2	81,843	3,130.6	723.9	725.8

Laurel Highlands

- The Laurel Highlands in southwestern PA is comprised of the following counties: Fayette, Somerset, and Westmorland.
- Travelers spent nearly $1.8 billion in the Laurel Highlands region in 2012 –a 2.1% increase from 2011.
- The region had the second highest proportion of travelers' dollars going towards lodging, food & beverages, and shopping among the state's 11 tourism regions, and the third lowest share spent on transportation.

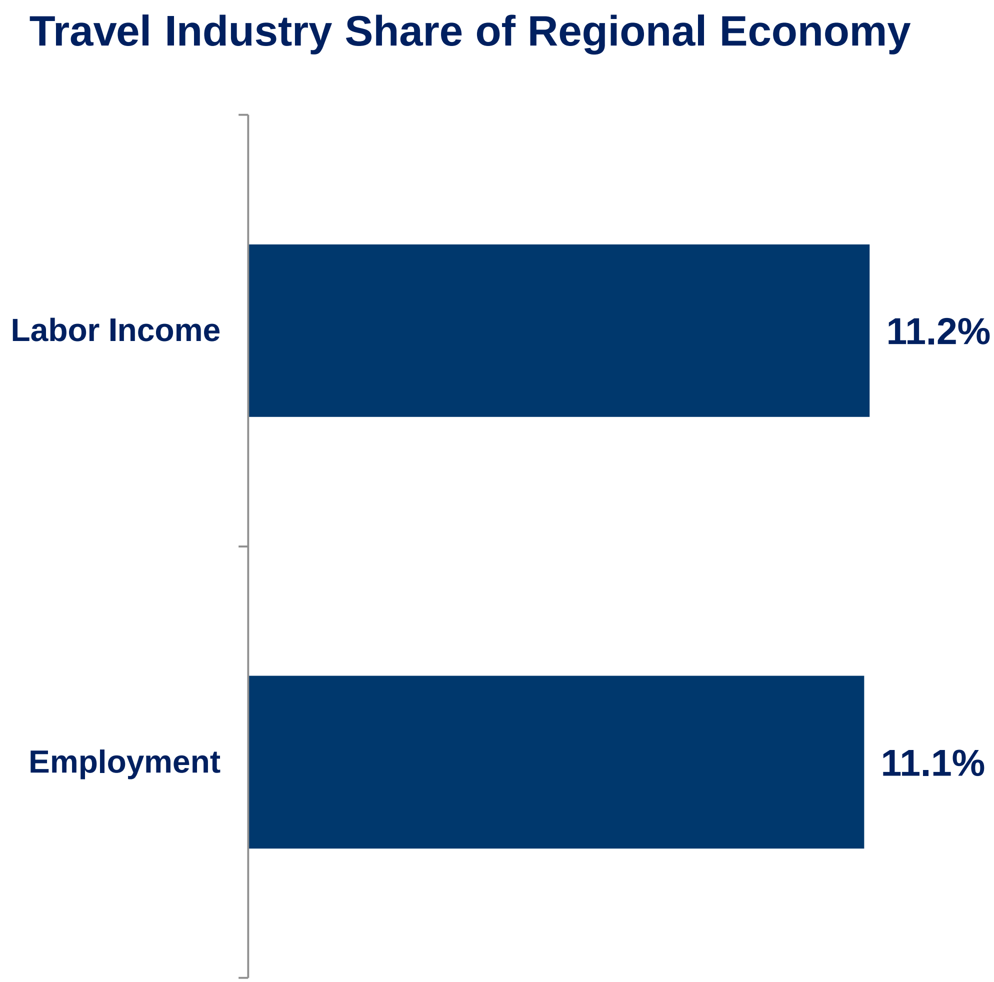
Laurel Highlands Region 2012 Spending by Category



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 labor income for the Laurel Highlands region was 11.2% in 2012, just slightly higher than the industry's employment share of 11.1%.
- As in 2011, the travel industry supported 11.1% of the region's total job count – the second highest proportion of PA's 11 tourism regions, while ranking 7th in the count of total travel-supported jobs.



Tourism Timeline – Laurel Highlands

Tourism Industry Spending (Millions of dollars)								
County	2005	2006	2007	2008	2009	2010	2011	2012
Fayette	543.4	562.1	563.6	618.4	538.2	595.7	636.0	643.9
Somerset	322.0	309.6	325.2	357.2	306.9	330.1	371.0	378.7
Westmoreland	609.9	621.0	623.5	706.4	587.6	651.6	724.7	745.9
Laurel Highlands	1,475.3	1,492.8	1,512.2	1,682.0	1,432.6	1,577.3	1,731.7	1,768.5
Percent Change		1.2%	1.3%	11.2%	-14.8%	10.1%	9.8%	2.1%

Tourism Industry Employment Impacts								
County	2005	2006	2007	2008	2009	2010	2011	2012
Fayette	5,275	5,273	5,272	5,241	5,047	5,219	5,295	5,417
Somerset	3,466	3,449	3,431	3,449	3,255	3,234	3,257	3,193
Westmoreland	5,512	5,510	5,539	5,582	5,243	5,369	5,476	5,632
Laurel Highlands	14,253	14,232	14,242	14,272	13,544	13,822	14,028	14,242
Percent Change		-0.1%	0.1%	0.2%	-5.1%	2.1%	1.5%	1.5%

Tourism Direct Sales – Laurel Highlands

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2012						
Fayette	107.8	137.8	112.6	116.8	168.9	643.9
Somerset	51.7	80.8	63.1	65.6	117.5	378.7
Westmoreland	76.2	156.3	141.7	133.0	238.7	745.9
Laurel Highlands	235.6	375.0	317.3	315.4	525.2	1,768.5
Percent Change	0.1%	0.0%	4.5%	1.1%	3.8%	2.1%
2011						
Fayette	108.8	139.5	109.6	116.5	161.7	636.0
Somerset	51.7	80.0	61.5	64.9	112.9	371.0
Westmoreland	75.1	155.5	132.5	130.5	231.2	724.7
Laurel Highlands	235.5	375.0	303.6	311.9	505.7	1,731.7

Laurel Highlands TSA Spending

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2012				
Fayette	643.9	2.9	29.8	676.6
Somerset	378.7	1.9	17.5	398.1
Westmoreland	745.9	3.3	34.5	783.7
Laurel Highlands	1,768.5	8.1	81.9	1,858.5
Percent Change	2.1%	-1.0%	-1.5%	1.9%
2011				
Fayette	636.0	2.9	30.5	669.5
Somerset	371.0	1.9	17.8	390.8
Westmoreland	724.7	3.3	34.8	762.8
Laurel Highlands	1,731.7	8.2	83.2	1,823.0

Laurel Highlands Impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State &	Federal
2012					
Fayette	643.9	5,417	136.9	35.7	31.2
Somerset	378.7	3,193	83.3	21.5	18.7
Westmoreland	745.9	5,632	127.2	38.2	31.7
Laurel Highlands	1,768.5	14,242	347.4	95.4	81.7
Percent Change	2.1%	1.5%	2.8%	4.5%	2.8%
2011					
Fayette	636.0	5,295	129.9	34.0	30.0
Somerset	371.0	3,257	85.7	21.0	18.9
Westmoreland	724.7	5,476	122.5	36.3	30.6
Laurel Highlands	1,731.7	14,028	338.1	91.3	79.5

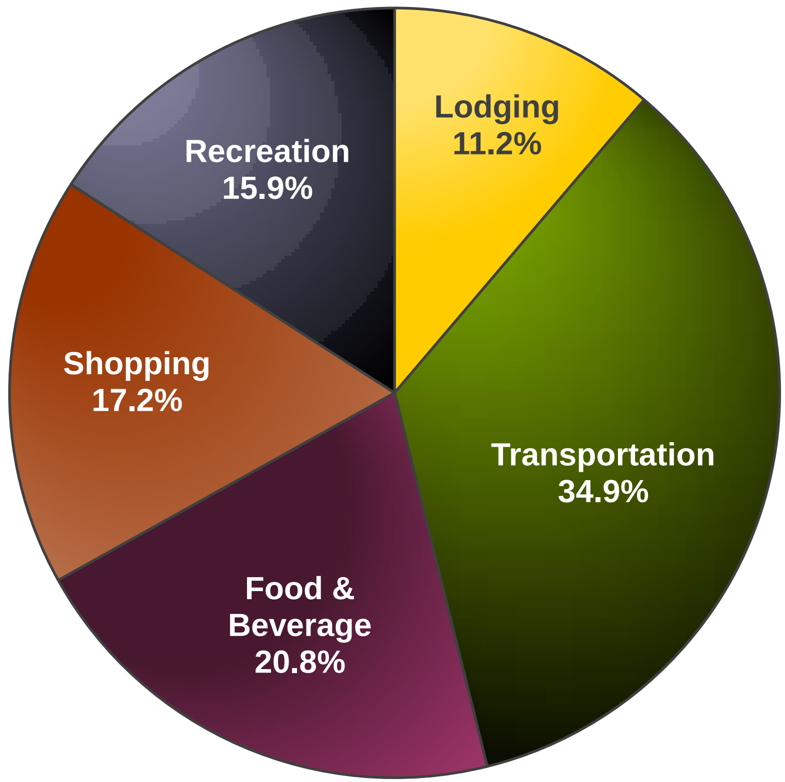
Laurel Highlands Impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2012					
Fayette	676.6	7,808	249.2	63.1	62.9
Somerset	398.1	4,731	156.5	37.8	37.7
Westmoreland	783.7	9,468	296.3	67.2	63.9
Laurel Highlands	1,858.5	22,008	702.0	168.1	164.4
Percent Change	1.9%	1.1%	1.8%	4.5%	2.8%
2011					
Fayette	669.5	7,663	239.2	60.0	60.4
Somerset	390.8	4,818	160.7	37.0	38.0
Westmoreland	762.8	9,279	289.7	63.9	61.6
Laurel Highlands	1,823.0	21,760	689.6	160.9	160.0

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 more than $1.7 billion in the Pennsylvania Wilds region in 2012 – a 2.8% increase from 2011.

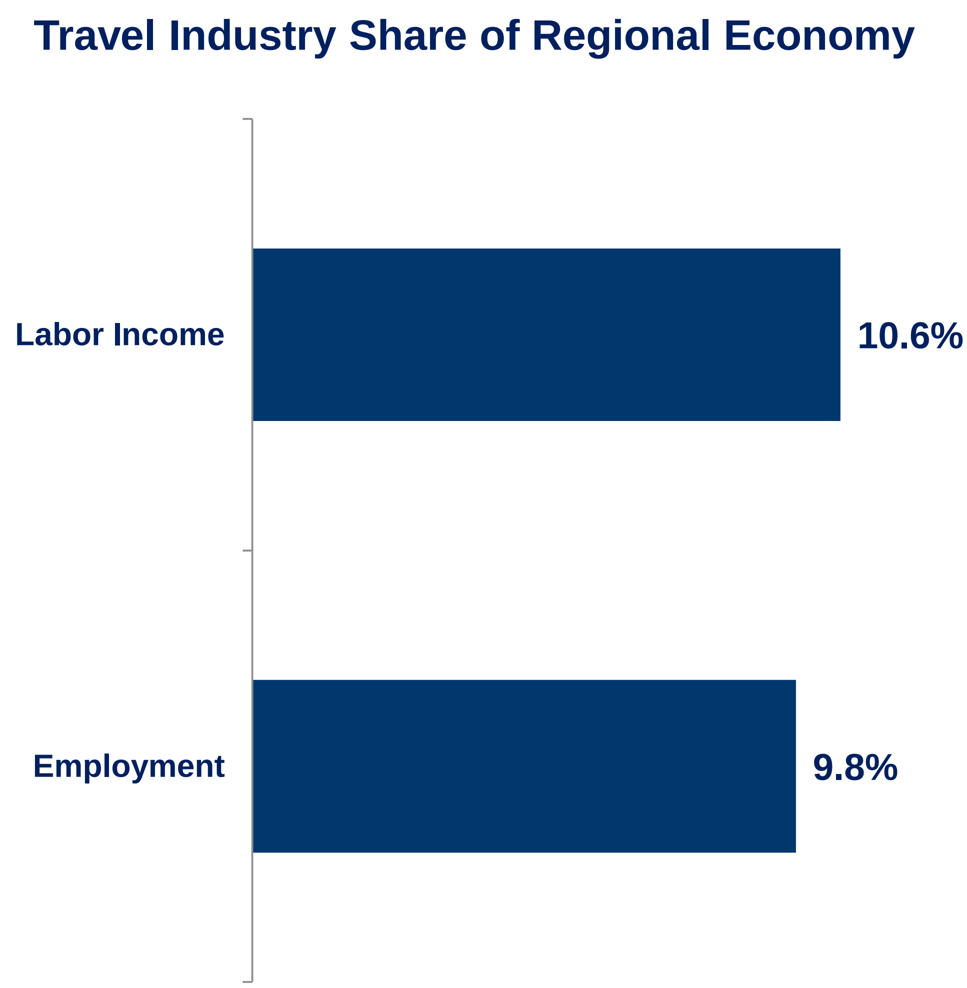
Pennsylvania Wilds Region Spending by Category



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 labor income share for the Pennsylvania Wilds region was 10.6% in 2012, above the industry's employment share of 9.8%.
- The region had the 10th highest number of travel-supported jobs of PA's 11 tourism regions, but ranked 3rd in employment intensity in 2012.



Tourism Timeline - Pennsylvania Wilds

Tourism Industry Spending (Millions of dollars)								
County	2005	2006	2007	2008	2009	2010	2011	2012
Cameron	7.8	7.9	8.4	9.3	7.8	9.0	9.5	9.6
Clarion	90.1	94.3	101.7	112.0	93.5	108.1	112.5	118.6
Clearfield	222.6	227.5	233.5	250.3	212.3	248.9	261.8	264.3
Clinton	109.8	108.9	111.1	123.2	108.0	136.6	151.4	153.9
Elk	47.9	47.8	51.5	57.9	47.2	52.3	61.4	66.1
Forest	18.2	18.6	19.7	21.2	18.5	20.4	23.7	22.6
Jefferson	93.0	90.3	92.6	97.8	82.2	102.9	109.9	113.6
Lycoming	231.2	241.5	255.6	293.1	269.3	308.7	384.4	398.2
McKean	119.6	120.0	126.1	138.9	123.2	158.9	164.0	173.4
Potter	24.6	25.1	26.6	29.3	27.0	30.1	36.6	34.3
Tioga	144.1	139.5	149.1	159.1	139.5	171.2	192.3	193.4
Warren	121.5	127.9	137.0	157.8	137.7	149.3	162.5	169.4
Pennsylvania Wilds	1,230.4	1,249.3	1,312.9	1,450.1	1,266.2	1,496.4	1,670.0	1,717.3
Percent Change		1.5%	5.1%	10.4%	-12.7%	18.2%	11.6%	2.8%

Tourism Timeline - Pennsylvania Wilds

Tourism Industry Employment Impacts								
County	2005	2006	2007	2008	2009	2010	2011	2012
Cameron	75	76	78	79	73	74	75	75
Clarion	956	952	947	963	899	972	993	1,022
Clearfield	1,499	1,553	1,594	1,623	1,594	1,770	1,793	1,775
Clinton	805	802	818	835	798	952	990	993
Elk	487	494	495	496	462	488	509	531
Forest	124	125	129	131	124	135	136	137
Jefferson	699	714	719	732	683	747	762	785
Lycoming	2,504	2,497	2,553	2,573	2,538	2,707	2,790	2,901
McKean	999	988	1,008	997	943	1,112	1,130	1,114
Potter	186	188	193	197	195	206	216	229
Tioga	1,272	1,260	1,250	1,253	1,215	1,387	1,451	1,461
Warren	1,128	1,123	1,142	1,154	1,123	1,133	1,149	1,120
Pennsylvania Wilds	10,733	10,772	10,926	11,032	10,648	11,684	11,993	12,142
Percent Change		0.4%	1.4%	1.0%	-3.5%	9.7%	2.6%	1.2%

Tourism Direct Sales - Pennsylvania Wilds

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2012						
Cameron	0.6	1.7	1.8	2.4	3.2	9.6
Clarion	15.8	26.3	21.9	19.0	35.7	118.6
Clearfield	28.2	54.4	48.2	42.9	90.5	264.3
Clinton	16.0	32.5	24.7	25.6	55.0	153.9
Elk	7.3	15.7	12.8	9.6	20.6	66.1
Forest	3.1	4.5	4.8	4.0	6.2	22.6
Jefferson	10.0	21.1	17.5	21.2	43.7	113.6
Lycoming	56.6	89.2	70.5	54.1	127.6	398.2
McKean	17.7	32.7	26.7	27.1	69.1	173.4
Potter	4.8	7.1	5.5	5.4	11.5	34.3
Tioga	23.4	39.4	34.3	32.9	63.5	193.4
Warren	9.0	32.3	26.7	28.5	72.8	169.4
Pennsylvania Wilds	192.7	356.8	295.4	272.9	599.6	1,717.3
Percent Change	-2.6%	-0.2%	5.2%	1.2%	6.2%	2.8%

Tourism Direct Sales - Pennsylvania Wilds

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2011						
Cameron	0.6	1.7	1.7	2.4	3.1	9.5
Clarion	14.6	25.5	20.6	18.1	33.7	112.5
Clearfield	30.5	55.9	45.5	43.4	86.5	261.8
Clinton	16.5	32.7	24.1	25.8	52.3	151.4
Elk	7.4	13.3	11.1	9.2	20.4	61.4
Forest	3.4	5.2	4.8	4.2	6.2	23.7
Jefferson	9.8	21.5	17.0	19.4	42.1	109.9
Lycoming	58.2	88.9	67.2	54.2	116.0	384.4
McKean	17.2	32.1	24.9	26.1	63.6	164.0
Potter	5.4	7.5	5.6	6.6	11.5	36.6
Tioga	24.6	40.6	32.8	32.4	61.9	192.3
Warren	9.7	32.6	25.4	27.9	66.9	162.5
Pennsylvania Wilds	197.9	357.5	280.7	269.6	564.3	1,670.0

Pennsylvania Wilds TSA Spending

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2012				
Cameron	9.6	0.0	0.4	10.1
Clarion	118.6	0.6	5.5	124.7
Clearfield	264.3	1.3	12.2	277.8
Clinton	153.9	0.7	7.1	161.7
Elk	66.1	0.3	3.1	69.5
Forest	22.6	0.1	1.0	23.7
Jefferson	113.6	0.5	5.3	119.4
Lycoming	398.2	1.9	18.4	418.5
McKean	173.4	0.8	8.0	182.2
Potter	34.3	0.2	1.6	36.1
Tioga	193.4	1.0	9.0	203.3
Warren	169.4	0.6	7.8	177.9
Pennsylvania Wilds	1,717.3	8.1	79.5	1,804.9
Percent Change	2.8%	-0.6%	-0.8%	2.7%

Pennsylvania Wilds TSA Spending

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2011				
Cameron	9.5	0.0	0.5	10.0
Clarion	112.5	0.6	5.4	118.5
Clearfield	261.8	1.3	12.6	275.6
Clinton	151.4	0.7	7.3	159.4
Elk	61.4	0.3	2.9	64.6
Forest	23.7	0.1	1.1	25.0
Jefferson	109.9	0.5	5.3	115.7
Lycoming	384.4	1.9	18.5	404.8
McKean	164.0	0.8	7.9	172.7
Potter	36.6	0.2	1.8	38.6
Tioga	192.3	1.0	9.2	202.5
Warren	162.5	0.6	7.8	170.9
Pennsylvania Wilds	1,670.0	8.2	80.2	1,758.3

Pennsylvania Wilds Impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2012					
Cameron	9.6	75	1.4	0.4	0.4
Clarion	118.6	1,022	22.9	6.4	5.5
Clearfield	264.3	1,775	45.8	13.8	11.4
Clinton	153.9	993	25.8	8.0	6.5
Elk	66.1	531	10.1	3.1	2.6
Forest	22.6	137	3.7	1.1	0.9
Jefferson	113.6	785	21.6	6.1	5.2
Lycoming	398.2	2,901	73.7	21.2	17.8
McKean	173.4	1,114	27.7	8.6	7.1
Potter	34.3	229	5.7	1.8	1.4
Tioga	193.4	1,461	36.4	10.3	8.7
Warren	169.4	1,120	25.5	8.1	6.7
Pennsylvania Wilds	1,717.3	12,142	300.2	88.9	74.0
Percent Change	2.8%	1.2%	4.6%	5.0%	3.9%

TOURISM ECONOMICS

Pennsylvania Wilds Impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2011					
Cameron	9.5	75	1.4	0.4	0.4
Clarion	112.5	993	22.1	6.0	5.2
Clearfield	261.8	1,793	44.9	13.2	11.1
Clinton	151.4	990	22.7	7.3	6.0
Elk	61.4	509	9.2	3.0	2.4
Forest	23.7	136	2.6	1.1	0.8
Jefferson	109.9	762	19.6	5.6	4.8
Lycoming	384.4	2,790	69.3	20.1	16.8
McKean	164.0	1,130	27.8	8.2	6.9
Potter	36.6	216	4.8	1.7	1.4
Tioga	192.3	1,451	37.1	10.2	8.8
Warren	162.5	1,149	25.7	7.9	6.6
Pennsylvania Wilds	1,670.0	11,993	287.1	84.7	71.2

Pennsylvania Wilds Impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2012					
Cameron	10.1	128	3.6	0.8	0.7
Clarion	124.7	1,609	48.7	11.3	11.0
Clearfield	277.8	2,864	96.7	24.1	22.8
Clinton	161.7	1,574	53.1	14.0	13.1
Elk	69.5	882	24.5	5.5	5.1
Forest	23.7	230	8.1	1.9	1.8
Jefferson	119.4	1,332	47.7	10.7	10.4
Lycoming	418.5	4,528	149.5	37.2	35.7
McKean	182.2	1,734	56.2	15.2	14.3
Potter	36.1	393	13.2	3.1	2.9
Tioga	203.3	2,189	70.1	18.1	17.4
Warren	177.9	1,774	54.3	14.4	13.5
Pennsylvania Wilds	1,804.9	19,236	625.7	156.2	148.8
Percent Change	2.7%	0.9%	3.0%	5.1%	3.9%

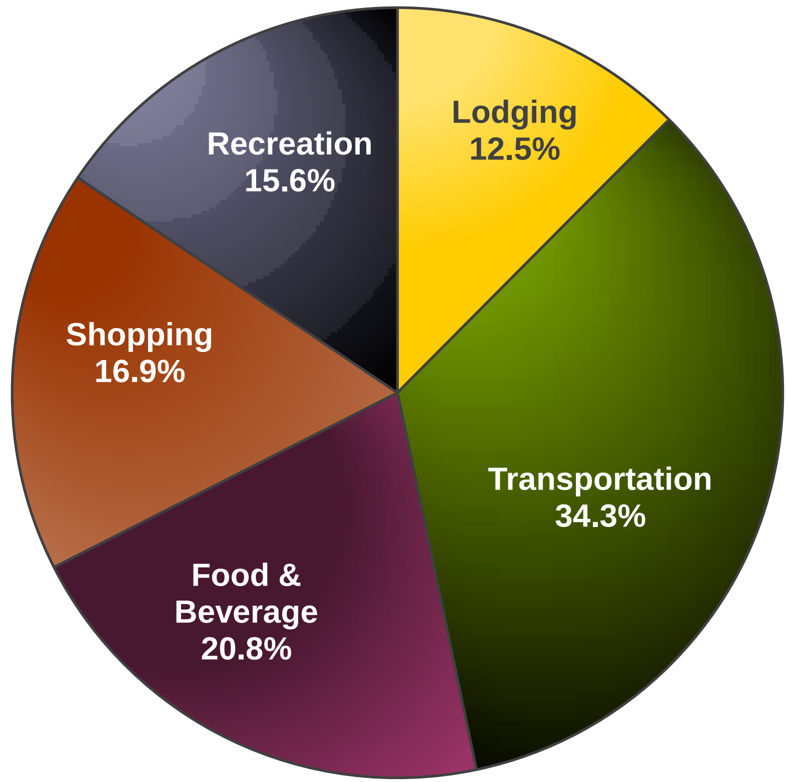
Pennsylvania Wilds Impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2011					
Cameron	10.0	128	3.6	0.8	0.7
Clarion	118.5	1,575	47.6	10.5	10.4
Clearfield	275.6	2,891	95.6	23.2	22.4
Clinton	159.4	1,572	48.5	12.8	12.0
Elk	64.6	854	23.3	5.2	4.9
Forest	25.0	229	6.4	1.9	1.6
Jefferson	115.7	1,304	44.8	9.9	9.6
Lycoming	404.8	4,392	143.1	35.0	33.9
McKean	172.7	1,756	56.5	14.4	14.0
Potter	38.6	378	11.9	3.0	2.7
Tioga	202.5	2,178	71.3	17.9	17.6
Warren	170.9	1,814	54.8	13.9	13.3
Pennsylvania Wilds	1,758.3	19,068	607.3	148.6	143.2

The Alleghenies

- The Alleghenies is comprised of the following counties: Bedford, Blair, Cambria, Centre, Fulton, Huntingdon, Juniata, and Mifflin.
- Travelers spent more than $1.8 billion in The Alleghenies region in 2012 – a 2.8% increase from 2011.
- Visitors to the region spent a relatively high percentage of their travel dollars on lodging and transportation with the region ranking 4th and 3rd, respectively, in the proportion of traveler dollars spent on these categories, but among the lowest for recreation in 2012.

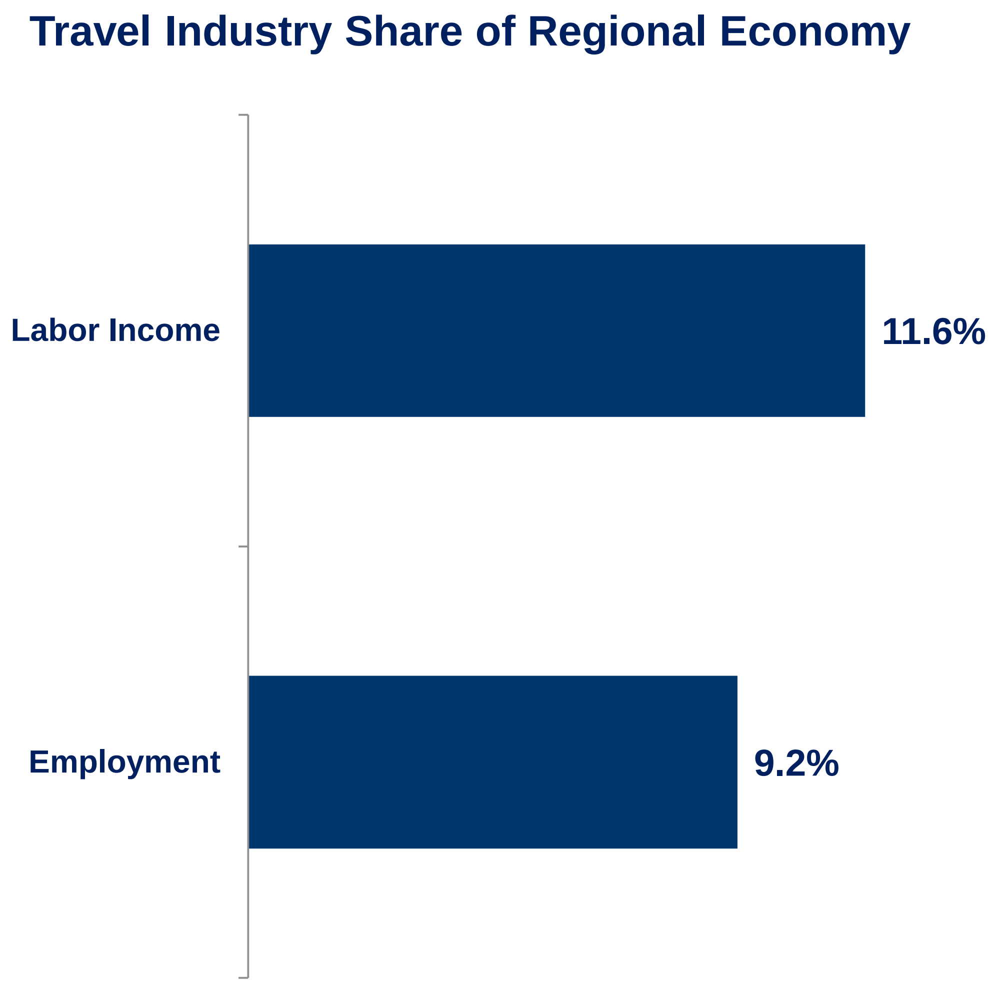
The Alleghenies Region 2012 Spending by Category



Source: Tourism Economics

The Allegheniese

- 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-related labor income share for The Alleghenies region was 11.6% in 2012, which was well above the industry's employment share of 9.2%.
- The region ranked 5th among PA's 11 tourism regions for the travel industry's share of regional employment in 2012, but 2nd for the travel industry's share of regional labor income.



Tourism Timeline – The Alleghenies

Tourism Industry Spending (Millions of dollars)								
County	2005	2006	2007	2008	2009	2010	2011	2012
Bedford	244.2	243.5	259.6	286.0	239.0	263.0	274.7	280.2
Blair	257.8	260.4	278.1	296.8	249.3	271.2	295.3	307.4
Cambria	235.2	232.3	244.3	280.9	238.5	257.6	290.5	303.4
Centre	498.7	511.2	531.4	616.4	545.6	588.7	649.3	654.3
Fulton	18.8	19.2	20.4	22.4	17.4	19.3	21.7	23.7
Huntingdon	129.5	125.7	135.3	146.6	129.1	144.1	153.1	162.8
Juniata	28.0	28.6	30.3	33.4	28.5	31.0	34.8	36.3
Mifflin	57.6	58.4	60.8	67.0	54.4	58.9	62.8	63.5
The Alleghenies	1,469.8	1,479.2	1,560.1	1,749.6	1,501.9	1,633.9	1,782.3	1,831.6
Percent Change		0.6%	5.5%	12.1%	-14.2%	8.8%	9.1%	2.8%

Tourism Industry Employment Impacts								
County	2005	2006	2007	2008	2009	2010	2011	2012
Bedford	1,993	2,044	2,113	2,151	1,977	2,026	2,015	1,967
Blair	2,389	2,449	2,512	2,582	2,446	2,499	2,544	2,554
Cambria	2,190	2,173	2,155	2,109	2,021	2,005	2,021	2,064
Centre	4,701	4,635	4,657	4,782	4,641	4,705	4,765	4,835
Fulton	146	148	152	154	143	152	152	154
Huntingdon	1,168	1,209	1,224	1,244	1,221	1,273	1,308	1,292
Juniata	237	240	247	251	239	218	219	222
Mifflin	577	588	599	610	567	583	589	598
The Alleghenies	13,400	13,486	13,658	13,883	13,254	13,460	13,614	13,686
Percent Change		0.6%	1.3%	1.6%	-4.5%	1.6%	1.1%	0.5%

Tourism Direct Sales – The Alleghenies

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2012						
Bedford	41.0	53.5	43.5	43.1	99.0	280.2
Blair	29.5	62.0	53.9	48.9	113.0	307.4
Cambria	24.5	58.1	49.0	48.4	123.4	303.4
Centre	111.0	145.1	114.5	94.9	188.9	654.3
Fulton	1.8	4.6	4.0	4.8	8.5	23.7
Huntingdon	13.0	34.3	27.1	29.9	58.5	162.8
Juniata	1.8	7.8	6.1	6.8	13.8	36.3
Mifflin	5.4	15.7	11.7	8.3	22.5	63.5
The Alleghenies	228.1	381.0	309.8	285.2	627.5	1,831.6
Percent Change	-0.3%	-0.5%	3.6%	1.7%	6.2%	2.8%
2011						
Bedford	40.0	54.7	43.0	43.0	93.9	274.7
Blair	29.2	61.8	51.6	48.1	104.6	295.3
Cambria	25.9	58.2	46.9	47.4	112.1	290.5
Centre	113.0	147.0	111.3	95.5	182.5	649.3
Fulton	1.3	4.3	3.7	4.0	8.5	21.7
Huntingdon	12.0	33.1	25.2	28.2	54.7	153.1
Juniata	1.7	8.0	5.9	6.2	12.9	34.8
Mifflin	5.7	15.8	11.4	8.2	21.7	62.8
The Alleghenies	228.8	382.9	299.1	280.6	591.0	1,782.3

The Alleghenies TSA Spending

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2012				
Bedford	280.2	1.2	13.0	294.4
Blair	307.4	1.4	14.2	323.0
Cambria	303.4	1.3	14.1	318.8
Centre	654.3	3.5	30.3	688.1
Fulton	23.7	0.1	1.1	24.9
Huntingdon	162.8	0.6	7.5	170.9
Juniata	36.3	0.1	1.7	38.1
Mifflin	63.5	0.3	2.9	66.7
The Alleghenies	1,831.6	8.5	84.8	1,924.9
Percent Change	2.8%	-0.6%	-0.9%	2.6%
2011				
Bedford	274.7	1.2	13.2	289.2
Blair	295.3	1.4	14.2	310.9
Cambria	290.5	1.3	14.0	305.7
Centre	649.3	3.6	31.2	684.1
Fulton	21.7	0.1	1.0	22.8
Huntingdon	153.1	0.6	7.4	161.1
Juniata	34.8	0.1	1.7	36.7
Mifflin	62.8	0.3	3.0	66.1
The Alleghenies	1,782.3	8.6	85.6	1,876.5

The Alleghenies Impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2012					
Bedford	280.2	1,967	51.9	14.9	12.6
Blair	307.4	2,554	69.2	17.5	15.5
Cambria	303.4	2,064	63.6	16.7	14.6
Centre	654.3	4,835	130.0	36.2	30.5
Fulton	23.7	154	3.7	1.1	0.9
Huntingdon	162.8	1,292	30.9	8.5	7.4
Juniata	36.3	222	4.6	1.7	1.3
Mifflin	63.5	598	13.2	3.5	3.0
The Alleghenies	1,831.6	13,686.5	367.2	100.1	85.8
Percent Change	2.8%	0.5%	4.6%	5.5%	4.2%
2011					
Bedford	274.7	2,015	52.6	14.5	12.6
Blair	295.3	2,544	65.5	16.4	14.7
Cambria	290.5	2,021	60.0	15.6	13.8
Centre	649.3	4,765	121.1	34.3	29.0
Fulton	21.7	152	3.8	1.1	0.9
Huntingdon	153.1	1,308	31.0	8.1	7.2
Juniata	34.8	219	4.4	1.6	1.3
Mifflin	62.8	589	12.6	3.3	2.9
The Alleghenies	1,782.3	13,613.7	351.0	94.9	82.4

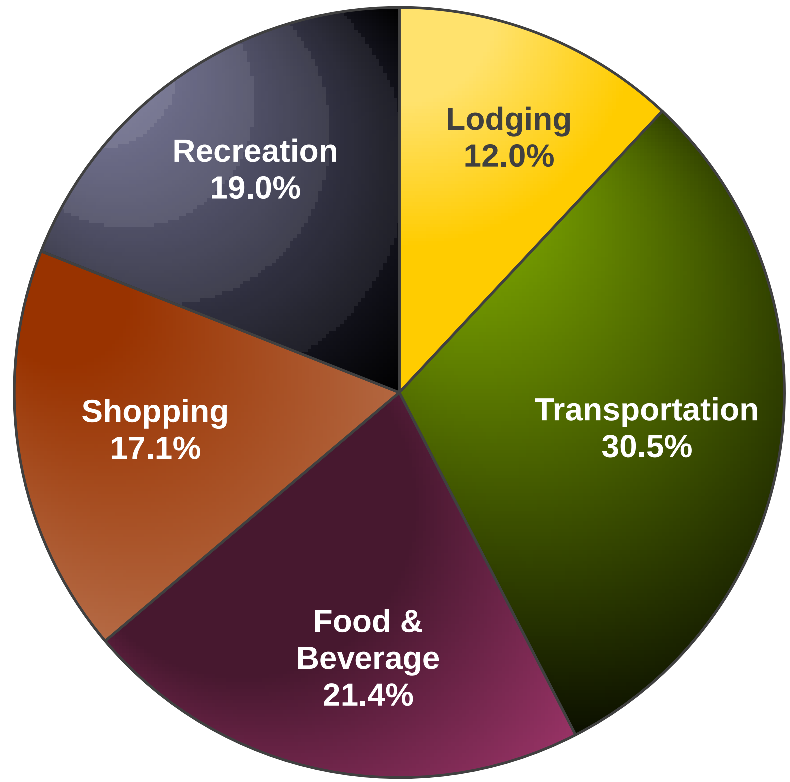
The Alleghenies Impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2012					
Bedford	294.4	2,922	97.7	26.2	25.3
Blair	323.0	4,069	141.8	30.9	31.1
Cambria	318.8	3,546	137.8	29.5	29.4
Centre	688.1	7,341	250.9	63.3	61.4
Fulton	24.9	283	9.5	#VALUE!	1.9
Huntingdon	170.9	1,994	62.7	15.1	14.8
Juniata	38.1	449	14.4	3.0	2.7
Mifflin	66.7	1,047	32.9	6.2	6.1
The Alleghenies	1,924.9	21,652.0	747.6	#VALUE!	172.8
Percent Change	2.6%	0.3%	3.1%	#VALUE!	4.2%
2011					
Bedford	289.2	2,987	99.0	25.6	25.3
Blair	310.9	4,061	136.5	28.9	29.6
Cambria	305.7	3,495	132.6	27.6	27.8
Centre	684.1	7,260	238.0	60.0	58.4
Fulton	22.8	281	9.7	1.9	1.9
Huntingdon	161.1	2,016	62.9	14.4	14.4
Juniata	36.7	447	14.2	2.8	2.5
Mifflin	66.1	1,036	32.0	5.9	5.9
The Alleghenies	1,876.5	21,583.2	724.8	167.0	165.8

Valleys of the Susquehanna

- The Valleys of the Susquehanna region is comprised of the following counties: Columbia, Montour, Northumberland, Snyder, and Union.
- Travelers spent $622 million in the Valleys of the Susquehanna region in 2012 – a 2.9% increase from 2011.
- The Valleys of the Susquehanna region continued to have the highest proportion of spending on food & beverages among the state's 11 tourism regions.

Valleys of the Susquehanna Region 2012 Spending by Category

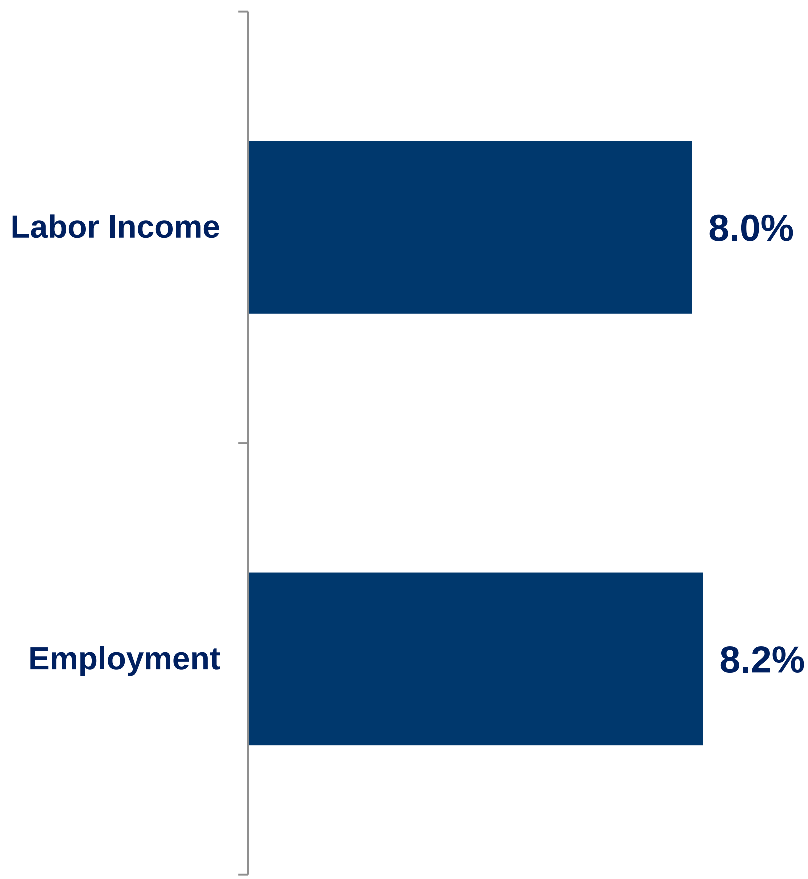


Source: Tourism Economics

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-related labor income share for the Valleys of the Susquehanna region was 8.0% in 2012, slightly below the industry's regional employment share of 8.2%.
- The region had the smallest number of travel-supported jobs among PA's 11 tourism regions, but ranked 8th for the travel industry's employment share in 2012.

Travel Industry Share of Regional Economy



Tourism Timeline – Valleys of the Susquehanna

Tourism Industry Spending (Millions of dollars)								
County	2005	2006	2007	2008	2009	2010	2011	2012
Columbia	114.5	117.8	125.5	140.3	114.5	127.6	150.5	150.6
Montour	84.8	84.5	84.9	93.5	79.2	88.0	97.3	105.3
Northumberland	96.5	99.5	102.9	114.4	99.1	113.3	118.3	118.3
Snyder	79.8	81.0	84.3	90.3	74.9	83.5	90.6	90.2
Union	110.2	113.4	118.0	136.7	115.7	124.3	147.8	157.5
Valleys of the Susquehanna	485.7	496.1	515.6	575.2	483.3	536.6	604.6	622.0
Percent Change		2.1%	3.9%	11.6%	-16.0%	11.0%	12.7%	2.9%

Tourism Industry Employment Impacts								
County	2005	2006	2007	2008	2009	2010	2011	2012
Columbia	1,082	1,111	1,147	1,163	1,141	1,171	1,217	1,258
Montour	861	865	863	850	800	823	839	863
Northumberland	953	984	980	997	943	988	1,013	1,050
Snyder	667	687	690	702	665	691	702	722
Union	1,040	1,063	1,098	1,116	1,098	1,126	1,152	1,188
Valleys of the Susquehanna	4,603	4,710	4,777	4,828	4,647	4,799	4,924	5,081
Percent Change		2.3%	1.4%	1.1%	-3.7%	3.3%	2.6%	3.2%

Tourism Direct Sales – Valleys of the Susquehanna

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2012						
Columbia	19.1	34.6	26.1	25.3	45.5	150.6
Montour	15.9	20.4	16.4	20.7	31.9	105.3
Northumberland	4.3	21.5	16.1	30.0	46.4	118.3
Snyder	9.9	20.5	18.9	17.2	23.6	90.2
Union	25.2	36.0	29.0	25.1	42.1	157.5
Valleys of the Susquehanna	74.4	133.1	106.6	118.3	189.5	622.0
Percent Change	-0.4%	-0.6%	4.2%	6.2%	4.0%	2.9%
2011						
Columbia	20.1	35.7	25.6	25.1	44.1	150.5
Montour	16.1	20.7	16.1	20.4	24.1	97.3
Northumberland	4.0	21.6	15.3	29.6	47.8	118.3
Snyder	10.1	20.9	18.2	15.8	25.7	90.6
Union	24.5	35.0	27.2	20.6	40.5	147.8
Valleys of the Susquehanna	74.7	133.9	102.3	111.5	182.2	604.6

Valleys of the Susquehanna TSA Spending

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2012				
Columbia	150.6	0.7	7.0	158.3
Montour	105.3	0.6	4.9	110.7
Northumberland	118.3	0.4	5.5	124.2
Snyder	90.2	0.4	4.2	94.8
Union	157.5	0.8	7.3	165.6
Valleys of the Susquehanna	622.0	3.0	28.8	653.7
Percent Change	2.9%	-0.5%	-0.8%	2.7%
2011				
Columbia	150.5	0.8	7.2	158.5
Montour	97.3	0.5	4.7	102.6
Northumberland	118.3	0.4	5.7	124.4
Snyder	90.6	0.4	4.4	95.4
Union	147.8	0.8	7.1	155.8
Valleys of the Susquehanna	604.6	3.0	29.0	636.7

Valleys of the Susquehanna Impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2012					
Columbia	150.6	1,258	27.8	8.0	6.7
Montour	105.3	863	20.0	5.7	4.8
Northumberland	118.3	1,050	27.2	6.6	6.0
Snyder	90.2	722	15.2	4.7	3.9
Union	157.5	1,188	28.5	8.4	6.9
Valleys of the Susquehanna	622.0	5,080.7	118.7	33.4	28.3
Percent Change	2.9%	3.2%	5.3%	5.9%	4.7%
2011					
Columbia	150.5	1,217	26.2	7.7	6.5
Montour	97.3	839	18.9	5.2	4.4
Northumberland	118.3	1,013	25.9	6.4	5.8
Snyder	90.6	702	14.3	4.5	3.7
Union	147.8	1,152	27.4	7.8	6.6
Valleys of the Susquehanna	604.6	4,924.4	112.7	31.6	27.0

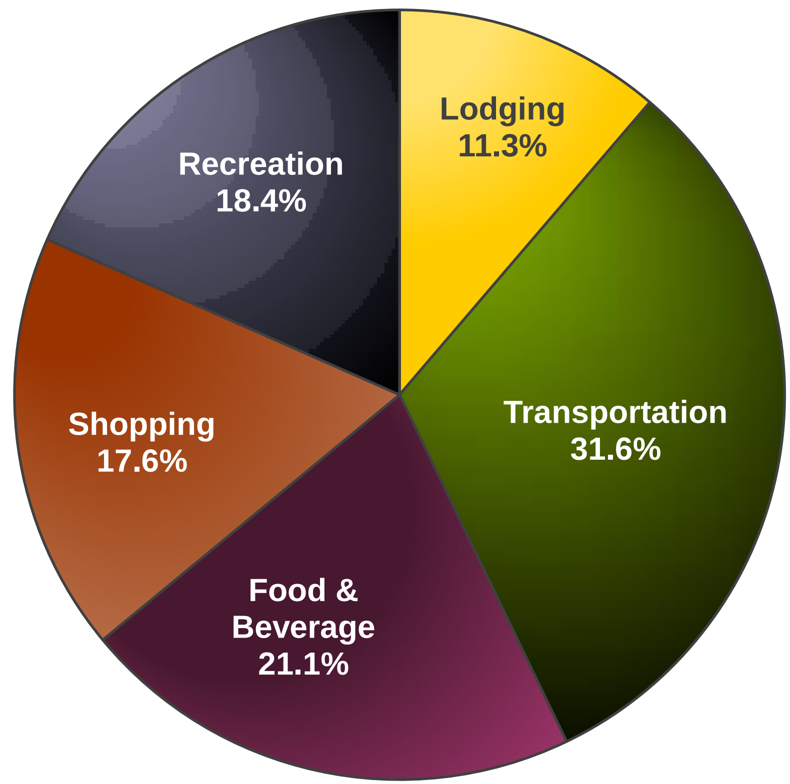
Valleys of the Susquehanna Impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2012					
Columbia	158.3	2,034	61.6	14.1	13.5
Montour	110.7	1,259	37.6	9.9	9.6
Northumberland	124.2	1,878	65.5	11.8	12.1
Snyder	94.8	1,184	35.0	8.3	7.8
Union	165.6	1,837	57.9	14.7	13.9
Valleys of the Susquehanna	653.7	8,191.8	257.6	58.8	56.9
Percent Change	2.7%	2.4%	3.4%	6.0%	4.7%
2011					
Columbia	158.5	1,984	59.4	13.5	13.0
Montour	102.6	1,231	36.0	9.1	9.0
Northumberland	124.4	1,834	63.7	11.4	11.8
Snyder	95.4	1,160	33.7	7.8	7.4
Union	155.8	1,793	56.3	13.6	13.2
Valleys of the Susquehanna	636.7	8,002.0	249.2	55.4	54.4

Upstate PA

- The Upstate PA region is comprised of the following counties: Bradford, Lackawanna, Luzerne, Schuylkill, Sullivan, Susquehanna, and Wyoming.
- Travelers spent nearly $2.2 billion in the Upstate PA region in 2012 – a 3.9% increase from 2011 and topping $2 billion for the second year in a row.
- The Upstate PA region had the 3rd highest share of spending on food & beverages among the state's 11 tourism regions in 2012.

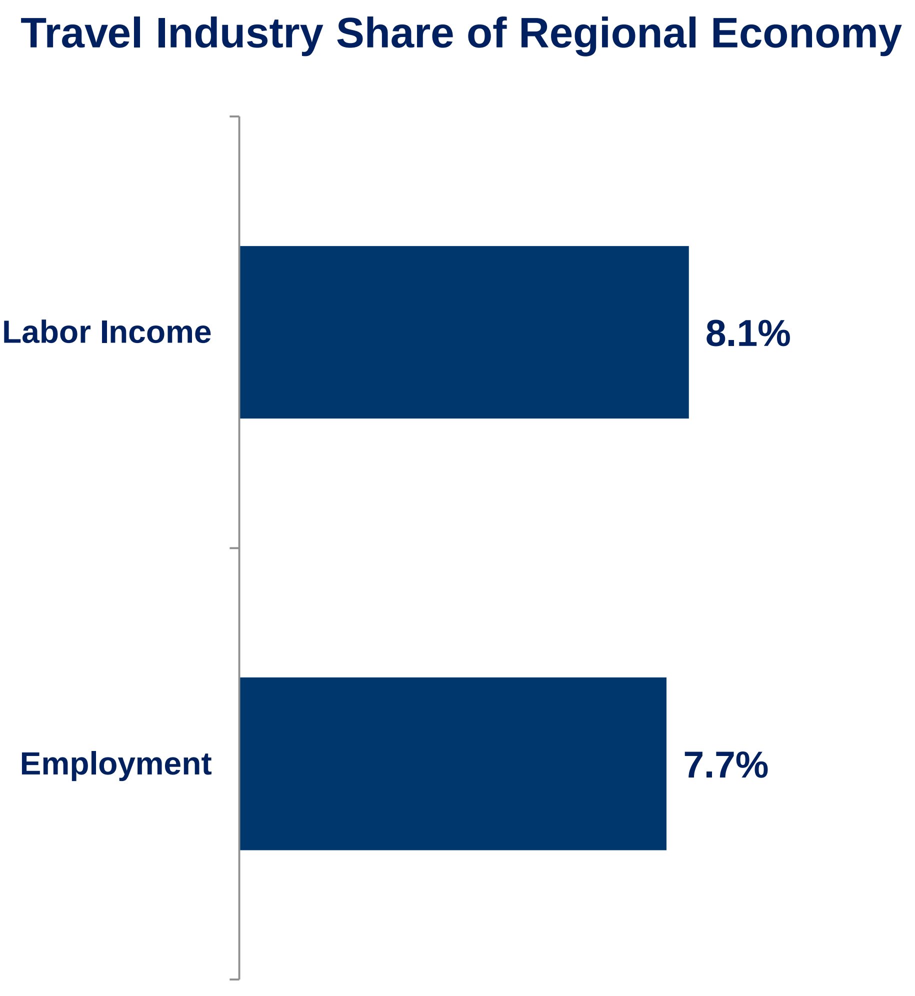
Upstate PA Region Spending by Category



Source: Tourism Economics

Upstate PA

- 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-related labor income share for the Upstate PA region was 8.1% in 2012, or somewhat above the region's 7.7% employment share.
- The region's employment share was the second lowest percentage of PA's 11 tourism regions, but the region ranked 5th in the actual number of travel-supported jobs.



Upstate PA Timeline

Tourism Industry Spending (Millions of dollars)								
County	2005	2006	2007	2008	2009	2010	2011	2012
Bradford	125.2	126.4	134.7	148.3	136.3	170.0	200.5	225.3
Lackawanna	478.4	482.8	514.4	566.5	483.1	536.5	615.5	632.1
Luzerne	674.5	702.6	752.5	818.6	708.3	795.5	870.3	870.2
Schuylkill	164.3	168.8	177.5	195.2	158.5	159.2	176.8	195.7
Sullivan	12.7	12.3	12.9	14.4	13.1	16.0	18.7	19.7
Susquehanna	107.5	112.6	121.5	140.4	122.7	141.6	151.8	164.3
Wyoming	33.2	35.3	37.0	40.3	36.8	41.3	53.1	61.2
UPSTATE PA	1,596.0	1,640.7	1,750.4	1,923.7	1,658.6	1,860.2	2,086.6	2,168.5
Percent Change		2.8%	6.7%	9.9%	-13.8%	12.2%	12.2%	3.9%

Tourism Industry Employment Impacts								
County	2005	2006	2007	2008	2009	2010	2011	2012
Bradford	1,017	1,014	1,011	1,031	1,037	1,252	1,326	1,333
Lackawanna	4,537	4,626	4,769	4,855	4,563	4,752	4,882	5,006
Luzerne	5,789	6,028	6,142	6,253	5,978	6,275	6,534	6,619
Schuylkill	1,207	1,215	1,254	1,287	1,187	1,165	1,177	1,203
Sullivan	109	111	116	118	117	138	148	160
Susquehanna	1,022	1,053	1,059	1,044	1,002	1,024	1,061	1,060
Wyoming	349	351	359	364	365	362	379	400
UPSTATE PA	14,030	14,399	14,709	14,952	14,250	14,967	15,507	15,781
Percent Change		2.6%	2.2%	1.7%	-4.7%	5.0%	3.6%	1.8%

Upstate PA Visitor Spending

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2012						
Bradford	24.0	44.8	34.5	36.2	85.7	225.3
Lackawanna	81.2	140.3	128.5	107.5	174.5	632.1
Luzerne	100.9	181.0	146.8	181.4	260.1	870.2
Schuylkill	15.2	43.8	33.0	29.5	74.4	195.7
Sullivan	2.4	3.3	2.8	5.4	5.8	19.7
Susquehanna	12.3	32.8	24.9	29.1	65.1	164.3
Wyoming	8.2	12.7	11.2	9.5	19.6	61.2
UPSTATE PA	244.2	458.6	381.7	398.8	685.2	2,168.5
Percent Change	3.5%	2.1%	5.6%	3.1%	4.9%	3.9%
2011						
Bradford	20.6	41.1	29.8	32.0	76.9	200.5
Lackawanna	81.8	138.9	124.5	105.1	165.2	615.5
Luzerne	99.7	181.1	142.0	181.4	266.0	870.3
Schuylkill	14.0	42.0	30.0	27.5	63.3	176.8
Sullivan	2.2	3.2	2.4	5.1	5.9	18.7
Susquehanna	10.9	31.5	22.8	27.5	59.1	151.8
Wyoming	6.6	11.3	9.9	8.2	17.0	53.1
UPSTATE PA	235.9	449.1	361.4	386.9	653.4	2,086.6

Upstate PA TSA

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2012				
Bradford	225.3	1.0	10.4	236.7
Lackawanna	632.1	3.4	29.3	664.8
Luzerne	870.2	4.9	40.3	915.4
Schuylkill	195.7	0.8	9.1	205.6
Sullivan	19.7	0.1	0.9	20.7
Susquehanna	164.3	0.6	7.6	172.5
Wyoming	61.2	0.3	2.8	64.2
UPSTATE PA	2,168.5	11.1	100.4	2,280.0
Percent Change	3.9%	0.1%	0.2%	3.7%
2011				
Bradford	200.5	0.9	9.6	211.1
Lackawanna	615.5	3.4	29.6	648.5
Luzerne	870.3	5.0	41.8	917.1
Schuylkill	176.8	0.8	8.5	186.0
Sullivan	18.7	0.1	0.9	19.7
Susquehanna	151.8	0.6	7.3	159.7
Wyoming	53.1	0.2	2.5	55.8
UPSTATE PA	2,086.6	11.1	100.2	2,197.9

Upstate PA Impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2012					
Bradford	225.3	1,333	31.8	10.9	8.6
Lackawanna	632.1	5,006	114.7	34.0	27.9
Luzerne	870.2	6,619	182.7	49.9	42.0
Schuylkill	195.7	1,203	36.9	10.3	8.8
Sullivan	19.7	160	3.2	1.0	0.8
Susquehanna	164.3	1,060	22.5	7.8	6.2
Wyoming	61.2	400	9.3	3.2	2.5
UPSTATE PA	2,168.5	15,780.9	401.0	117.0	96.9
Percent Change	3.9%	1.8%	3.0%	6.5%	3.9%
2011					
Bradford	200.5	1,326	31.4	9.8	8.1
Lackawanna	615.5	4,882	114.2	32.5	27.4
Luzerne	870.3	6,534	175.6	47.6	40.8
Schuylkill	176.8	1,177	35.3	9.3	8.2
Sullivan	18.7	148	2.7	0.9	0.7
Susquehanna	151.8	1,061	21.9	7.1	5.9
Wyoming	53.1	379	8.3	2.6	2.1
UPSTATE PA	2,086.6	15,506.6	389.4	109.9	93.2

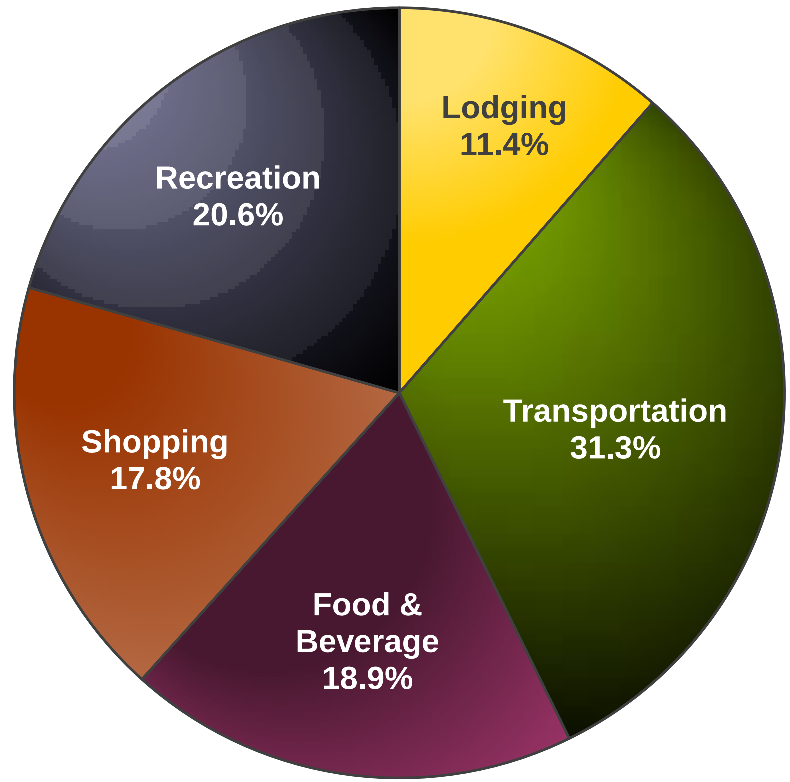
Upstate PA Impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2012					
Bradford	236.7	2,130	67.8	19.1	17.4
Lackawanna	664.8	7,859	241.0	59.2	56.1
Luzerne	915.4	10,630	376.3	86.8	84.6
Schuylkill	205.6	2,381	94.0	18.2	17.7
Sullivan	20.7	242	6.5	1.8	1.6
Susquehanna	172.5	1,678	48.9	13.7	12.5
Wyoming	64.2	675	21.6	5.6	5.1
UPSTATE PA	2,280.0	25,593.6	856.1	204.3	194.9
Percent Change	3.7%	1.3%	1.9%	6.3%	3.8%
2011					
Bradford	211.1	2,124	67.3	17.2	16.3
Lackawanna	648.5	7,709	240.8	56.8	55.1
Luzerne	917.1	10,533	366.5	83.0	82.1
Schuylkill	186.0	2,350	91.8	16.5	16.5
Sullivan	19.7	226	5.9	1.6	1.5
Susquehanna	159.7	1,681	48.2	12.6	11.8
Wyoming	55.8	649	20.0	4.6	4.3
UPSTATE PA	2,197.9	25,272.3	840.5	192.3	187.7

Pocono Mountains

- The Pocono Mountains region is comprised of the following counties: Carbon, Monroe, Pike, and Wayne.
- Travelers spent nearly $3.0 billion in the Pocono Mountains region in 2012 – the 4th highest in terms amount of traveler spending among PA's 11 tourism regions.
- The Pocono Mountains region had the 2nd highest share of spending on recreation among the state's 11 tourism regions in 2012.

Pocono Mountains Region 2012 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 travel-supported share of labor income was 47.9% in 2012, while the industry's employment share was 34.9%.
- As in prior years, the Pocono Mountains region had, by far, the highest proportion of labor income and employment supported by travel of PA's 11 tourism regions.

Pocono Mountains Timeline

Tourism Industry Spending (Millions of dollars)								
County	2005	2006	2007	2008	2009	2010	2011	2012
Carbon	299.4	288.8	303.3	320.2	294.5	314.7	332.4	343.7
Monroe	1,371.4	1,370.7	1,472.5	1,665.3	1,372.6	1,502.1	1,552.0	1,607.5
Pike	545.4	543.5	559.6	616.5	520.7	538.0	553.5	575.1
Wayne	371.4	382.6	409.3	437.6	400.4	422.4	432.7	429.5
Pocono Mountains	2,587.5	2,585.6	2,744.7	3,039.6	2,588.2	2,777.2	2,870.7	2,955.9
Percent Change		-0.1%	6.2%	10.7%	-14.9%	7.3%	3.4%	3.0%

Tourism Industry Employment Impacts								
County	2005	2006	2007	2008	2009	2010	2011	2012
Carbon	2,819	2,775	2,816	2,792	2,766	2,717	2,733	2,638
Monroe	13,123	13,192	13,719	13,777	12,780	12,937	13,011	12,848
Pike	5,629	5,658	5,758	5,715	5,257	4,856	4,852	4,758
Wayne	3,072	3,170	3,157	3,212	3,151	3,107	3,120	3,143
Pocono Mountains	24,642	24,794	25,451	25,496	23,954	23,617	23,717	23,387
Percent Change		0.6%	2.6%	0.2%	-6.0%	-1.4%	0.4%	-1.4%

Pocono Mountains Visitor Spending

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2012						
Carbon	37.4	66.7	51.6	66.4	121.7	343.7
Monroe	190.7	285.5	307.2	370.8	453.3	1,607.5
Pike	64.2	118.2	95.1	96.6	201.0	575.1
Wayne	45.7	89.0	70.9	74.8	149.1	429.5
Pocono Mountains	337.9	559.4	524.9	608.6	925.0	2,955.9
Percent Change	-0.3%	-0.6%	4.0%	1.8%	6.8%	3.0%
2011						
Carbon	37.3	66.0	52.6	65.3	111.1	332.4
Monroe	191.1	285.1	289.9	361.4	424.5	1,552.0
Pike	61.7	119.4	89.9	93.0	189.5	553.5
Wayne	48.9	92.3	72.1	78.1	141.4	432.7
Pocono Mountains	339.0	562.8	504.6	597.8	866.5	2,870.7

Pocono Mountains TSA

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2012				
Carbon	343.7	1.4	15.9	361.1
Monroe	1,607.5	7.8	74.4	1,689.8
Pike	575.1	2.5	26.6	604.3
Wayne	429.5	1.7	19.9	451.1
Pocono Mountains	2,955.9	13.4	136.9	3,106.2
Percent Change	3.0%	-0.5%	-0.7%	2.8%
2011				
Carbon	332.4	1.4	16.0	349.8
Monroe	1,552.0	7.8	74.5	1,634.4
Pike	553.5	2.5	26.6	582.6
Wayne	432.7	1.8	20.8	455.3
Pocono Mountains	2,870.7	13.5	137.9	3,022.1

Pocono Mountains Impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2012					
Carbon	343.7	2,638	59.3	17.5	14.7
Monroe	1,607.5	12,848	376.6	93.5	82.8
Pike	575.1	4,758	145.6	34.2	31.1
Wayne	429.5	3,143	96.1	24.2	21.5
Pocono Mountains	2,955.9	23,386.6	677.6	169.5	150.1
Percent Change	3.0%	-1.4%	0.7%	4.4%	1.9%
2011					
Carbon	332.4	2,733	59.7	16.9	14.5
Monroe	1,552.0	13,011	373.5	89.3	81.0
Pike	553.5	4,852	146.5	32.9	30.7
Wayne	432.7	3,120	93.0	23.3	21.0
Pocono Mountains	2,870.7	23,717.0	672.7	162.3	147.3

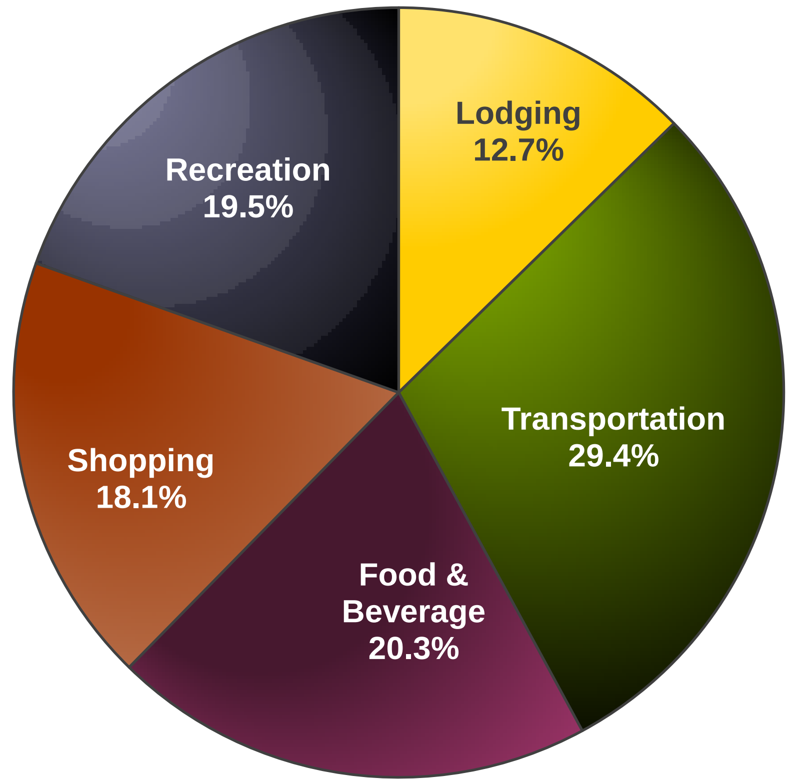
Pocono Mountains Impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2012					
Carbon	361.1	3,915	115.2	30.9	29.6
Monroe	1,689.8	18,442	666.3	164.9	166.8
Pike	604.3	6,768	253.2	60.6	62.7
Wayne	451.1	4,629	174.2	42.9	43.4
Pocono Mountains	3,106.2	33,753.1	1,208.9	299.3	302.5
Percent Change	2.8%	-1.3%	0.3%	4.4%	1.8%
2011					
Carbon	349.8	4,041	116.0	29.8	29.2
Monroe	1,634.4	18,672	663.5	157.4	163.4
Pike	582.6	6,895	255.4	58.2	62.0
Wayne	455.3	4,605	170.0	41.3	42.4
Pocono Mountains	3,022.1	34,213.4	1,204.9	286.8	297.0

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 $7.6 billion in the Dutch Country Roads region in 2012 – the second highest level among PA's 11 tourism regions and a 3.2% increase from 2011.
- The Dutch Country Roads region had the highest proportion of spending on shopping and the 2nd lowest on transportation of the state's 11 tourism regions.

Dutch Country Roads Region 2012 Spending by Category

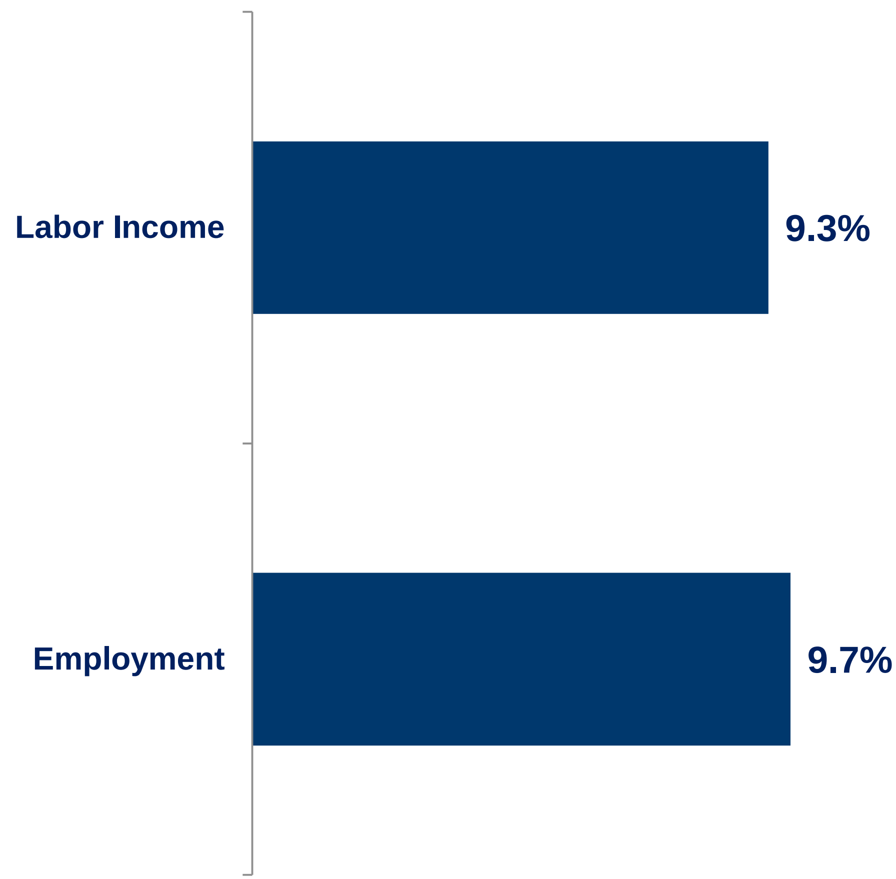


Source: Tourism Economics

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 was 9.3%, while the employment share was slightly higher at 9.7% in 2012.
- The number of travel-supported jobs was the second highest of PA's 11 tourism regions, while the region ranked 4th in the travel industry's employment share in 2012.

Travel Industry Share of Regional Economy



TOURISM ECONOMICS

Dutch Country Roads Timeline

Tourism Industry Spending (Millions of dollars)								
County	2005	2006	2007	2008	2009	2010	2011	2012
Adams	479.1	502.2	535.1	602.8	520.9	555.8	608.0	628.8
Berks	643.8	650.6	668.1	746.9	623.7	687.7	762.7	794.8
Cumberland	634.4	657.6	674.9	774.2	628.3	677.8	726.7	749.8
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
Franklin	248.3	259.6	280.8	322.2	270.2	286.5	298.0	314.8
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
Lebanon	152.4	154.8	158.9	182.2	159.9	170.9	185.6	192.6
Perry	43.0	42.9	44.2	48.6	40.6	43.6	48.7	46.8
York	720.2	741.2	764.3	829.2	706.5	753.5	850.2	885.1
Dutch Country Roads	6,062.2	6,274.7	6,491.9	7,355.2	6,351.8	6,858.9	7,407.6	7,643.8
Percent Change		3.5%	3.5%	13.3%	-13.6%	8.0%	8.0%	3.2%

Tourism Industry Employment Impacts								
County	2005	2006	2007	2008	2009	2010	2011	2012
Adams	4,739	4,830	4,972	5,063	4,835	4,771	4,788	4,866
Berks	6,098	6,182	6,401	6,490	6,067	6,173	6,238	6,468
Cumberland	6,121	6,280	6,327	6,408	5,909	5,812	5,935	6,068
Dauphin	17,406	17,769	18,141	18,282	17,583	17,735	17,887	18,533
Franklin	2,338	2,385	2,462	2,473	2,298	2,276	2,288	2,352
Lancaster	14,128	14,637	14,696	14,766	14,381	14,640	14,753	15,239
Lebanon	1,629	1,636	1,636	1,627	1,544	1,534	1,562	1,609
Perry	300	301	304	309	296	302	310	321
York	7,577	7,560	7,741	7,656	7,213	7,038	7,165	7,421
Dutch Country Roads	60,336	61,580	62,680	63,074	60,127	60,281	60,927	62,877
Percent Change		2.1%	1.8%	0.6%	-4.7%	0.3%	1.1%	3.2%

Tourism Direct Sales – Dutch Country Roads

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2012						
Adams	78.3	121.0	118.6	146.3	164.6	628.8
Berks	76.5	169.1	154.0	137.3	257.9	794.8
Cumberland	101.4	167.5	136.4	122.3	222.2	749.8
Dauphin	328.6	400.9	339.8	516.8	627.6	2,213.7
Franklin	32.1	66.6	53.6	54.1	108.4	314.8
Lancaster	242.6	374.2	368.0	330.1	502.6	1,817.5
Lebanon	15.2	44.5	39.6	31.6	61.8	192.6
Perry	2.0	10.5	8.4	6.8	19.2	46.8
York	92.6	193.6	166.1	148.8	284.0	885.1
Dutch Country Roads	969.0	1,548.0	1,384.5	1,494.0	2,248.3	7,643.8
Percent Change	2.4%	2.2%	6.4%	3.3%	2.2%	3.2%
2011						
Adams	77.7	120.0	111.4	141.3	157.6	608.0
Berks	73.9	163.6	144.6	135.3	245.2	762.7
Cumberland	99.3	163.8	127.0	118.0	218.6	726.7
Dauphin	321.8	392.6	320.4	495.8	604.5	2,135.1
Franklin	31.1	64.2	49.1	52.6	101.0	298.0
Lancaster	235.4	367.4	346.8	318.6	524.5	1,792.7
Lebanon	14.7	43.8	37.5	31.4	58.2	185.6
Perry	1.9	10.7	8.3	9.7	18.0	48.7
York	90.4	188.4	155.5	143.1	272.7	850.2
Dutch Country Roads	946.3	1,514.4	1,300.8	1,445.8	2,200.3	7,407.6

Dutch Country Roads TSA Spending

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2012				
Adams	628.8	3.2	29.1	661.1
Berks	794.8	3.9	36.8	835.5
Cumberland	749.8	3.9	34.7	788.4
Dauphin	2,213.7	15.4	102.5	2,331.5
Franklin	314.8	1.5	14.6	330.9
Lancaster	1,817.5	11.6	84.2	1,913.3
Lebanon	192.6	0.8	8.9	202.3
Perry	46.8	0.1	2.2	49.1
York	885.1	4.1	41.0	930.2
Dutch Country Roads	7,643.8	44.6	354.0	8,042.4
Percent Change	3.2%	-0.3%	-0.5%	3.0%
2011				
Adams	608.0	3.2	29.2	640.4
Berks	762.7	3.9	36.6	803.2
Cumberland	726.7	3.9	34.9	765.4
Dauphin	2,135.1	15.4	102.5	2,253.0
Franklin	298.0	1.5	14.3	313.7
Lancaster	1,792.7	11.8	86.1	1,890.5
Lebanon	185.6	0.8	8.9	195.3
Perry	48.7	0.2	2.3	51.2
York	850.2	4.1	40.8	895.1
Dutch Country Roads	7,407.6	44.7	355.8	7,808.0

Dutch Country Roads Impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2012					
Adams	628.8	4,866	130.5	35.0	30.0
Berks	794.8	6,468	173.9	45.1	39.2
Cumberland	749.8	6,068	153.5	41.4	35.5
Dauphin	2,213.7	18,533	568.1	138.3	120.7
Franklin	314.8	2,352	61.7	16.9	14.5
Lancaster	1,817.5	15,239	375.3	103.7	86.6
Lebanon	192.6	1,609	48.9	11.6	10.5
Perry	46.8	321	7.2	2.3	1.9
York	885.1	7,421	194.8	50.0	43.8
Dutch Country Roads	7,643.8	62,877	1,713.9	444.3	382.6
Percent Change	3.2%	3.2%	4.7%	6.4%	4.4%
2011					
Adams	608.0	4,788	127.0	33.1	29.0
Berks	762.7	6,238	165.2	42.2	37.3
Cumberland	726.7	5,935	145.4	39.0	33.8
Dauphin	2,135.1	17,887	545.4	130.9	116.0
Franklin	298.0	2,288	59.0	15.8	13.8
Lancaster	1,792.7	14,753	358.3	97.2	83.5
Lebanon	185.6	1,562	46.1	10.7	9.9
Perry	48.7	310	7.1	2.2	1.9
York	850.2	7,165	183.5	46.7	41.5
Dutch Country Roads	7,407.6	60,927	1,637.0	417.8	366.6

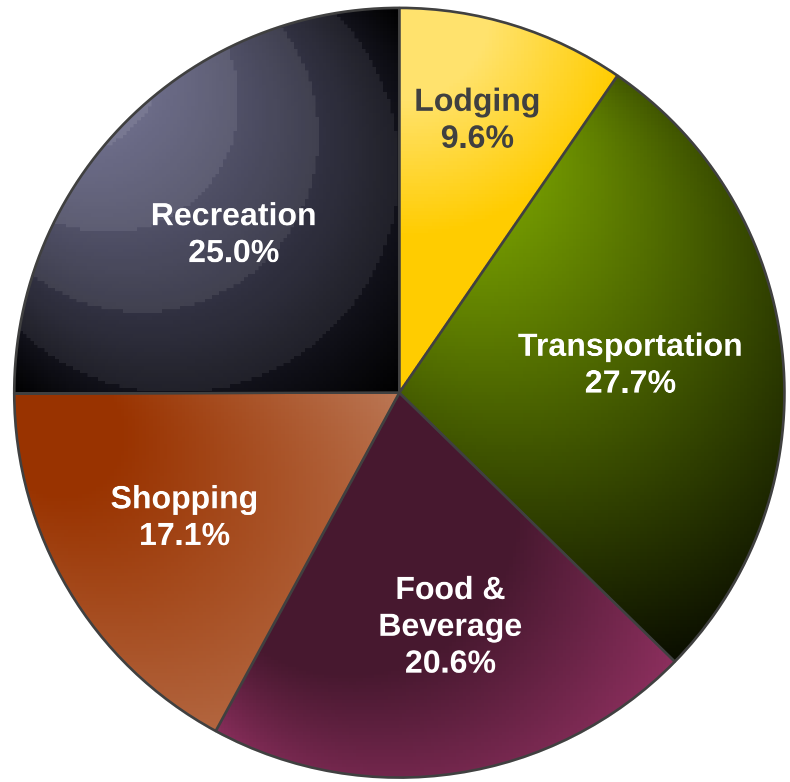
Dutch Country Roads Impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2012					
Adams	661.1	7,350	252.2	61.4	60.3
Berks	782.5	10,736	376.4	79.2	78.9
Cumberland	788.4	9,363	306.7	72.8	71.4
Dauphin	2,331.5	26,118	977.1	240.5	243.4
Franklin	330.9	3,938	136.0	29.8	29.2
Lancaster	1,913.3	23,121	737.6	180.2	174.5
Lebanon	202.3	2,843	109.8	20.5	21.2
Perry	49.1	685	23.2	4.1	3.8
York	930.2	12,136	416.5	88.1	88.2
Dutch Country Roads	7,989.4	96,290	3,335.6	776.5	770.9
Percent Change	-3.1%	2.5%	3.4%	6.2%	4.3%
2011					
.	640.4	7,260	245.5	58.1	58.5
Berks	1,243.8	10,456	364.0	74.2	75.1
Cumberland	765.4	9,204	295.3	68.5	68.2
Dauphin	2,253.0	25,329	945.5	227.3	233.9
Franklin	313.7	3,860	132.2	27.8	27.7
Lancaster	1,890.5	22,530	713.6	170.0	168.2
Lebanon	195.3	2,785	105.8	18.9	19.9
Perry	51.2	672	23.1	4.0	3.8
York	895.1	11,824	400.4	82.3	83.6
Dutch Country Roads	8,248.6	93,920	3,225.5	731.2	738.8

Lehigh Valley

- The Lehigh Valley region is comprised the following counties: Lehigh and Northampton.
- Traveler spending in the region was close to $1.9 billion in 2012 – a 5.7% increase from 2011, which was the second highest percentage increase of PA's 11 tourism regions.
- With its proximity to the NY and NJ markets, a strong day-trip market, and regional attractions, the Lehigh Valley region had the highest proportion of traveler spending on recreation among PA's 11 tourism regions and the lowest share spent on transportation.

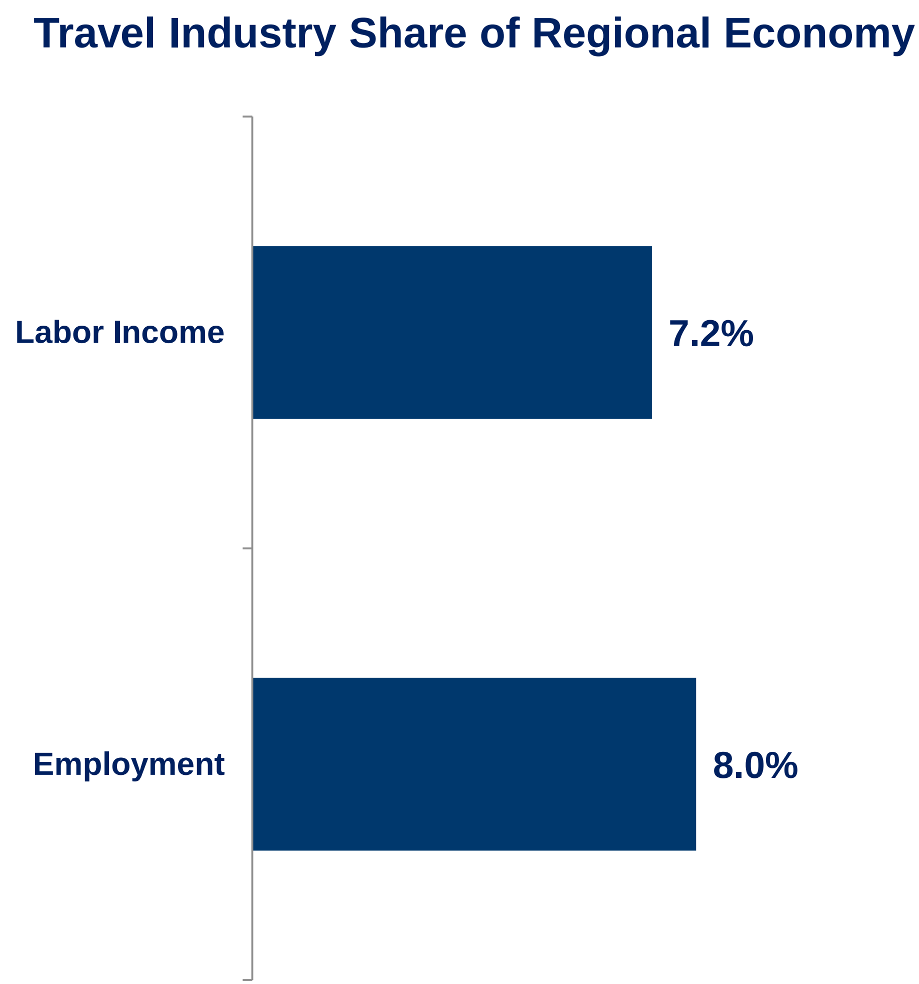
Lehigh Valley Region
2012 Spending by Category



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-supported labor income share for the Lehigh Valley region was 7.2%, while the industry's employment share was at 8.0% in 2012.
- The region ranked 6th in the actual number of travel-supported jobs among PA's 11 tourism regions in 2012, but 9th in the share of travel-supported employment.



Lehigh Valley Timeline

Tourism Industry Spending (Millions of dollars)								
County	2005	2006	2007	2008	2009	2010	2011	2012
Lehigh	867.2	891.2	952.9	1,061.4	872.1	925.4	996.3	1,030.7
Northampton	472.5	494.2	517.7	581.2	518.3	596.1	761.4	827.0
Lehigh Valley	1,339.7	1,385.4	1,470.6	1,642.6	1,390.4	1,521.4	1,757.7	1,857.7
Percent Change		3.4%	6.2%	11.7%	-15.4%	9.4%	15.5%	5.7%

Tourism Industry Employment Impacts								
County	2005	2006	2007	2008	2009	2010	2011	2012
Lehigh	8,079	8,160	8,242	8,274	7,732	7,555	7,624	7,838
Northampton	4,963	4,938	5,111	5,208	5,074	5,448	5,816	6,180
Lehigh Valley	13,042.1	13,098.2	13,353.5	13,482.1	12,806.4	13,002.5	13,440.0	14,018.1
Percent Change		0.4%	1.9%	1.0%	-5.0%	1.5%	3.4%	4.3%

Lehigh Valley Visitor Spending

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2012						
Lehigh	101.3	236.4	204.1	196.0	293.0	1,030.7
Northampton	76.8	146.2	112.9	268.9	222.1	827.0
Lehigh Valley	178.1	382.6	317.0	464.9	515.1	1,857.7
Percent Change	4.9%	1.2%	4.8%	10.8%	5.6%	5.7%
2011						
Lehigh	99.0	231.7	194.1	190.4	281.1	996.3
Northampton	70.8	146.3	108.4	229.3	206.7	761.4
Lehigh Valley	169.8	378.0	302.5	419.6	487.7	1,757.7

Lehigh Valley TSA

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2012				
Lehigh	1,030.7	5.3	47.7	1,083.7
Northampton	827.0	4.0	38.3	869.3
Lehigh Valley	1,857.7	9.2	86.0	1,952.9
Percent Change	5.7%	1.2%	1.9%	5.5%
2011				
Lehigh	996.3	5.3	47.8	1,049.4
Northampton	761.4	3.8	36.6	801.8
Lehigh Valley	1,757.7	9.1	84.4	1,851.2

Lehigh Valley Impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2012					
Lehigh	1,030.7	7,838	211.6	57.1	48.9
Northampton	827.0	6,180	197.8	49.4	43.4
Lehigh Valley	1,857.7	14,018.1	409.4	106.5	92.3
Percent Change	5.7%	4.3%	8.2%	9.4%	7.7%
2011					
Lehigh	996.3	7,624	202.2	54.0	46.8
Northampton	761.4	5,816	176.2	43.4	38.8
Lehigh Valley	1,757.7	13,440.0	378.4	97.4	85.7

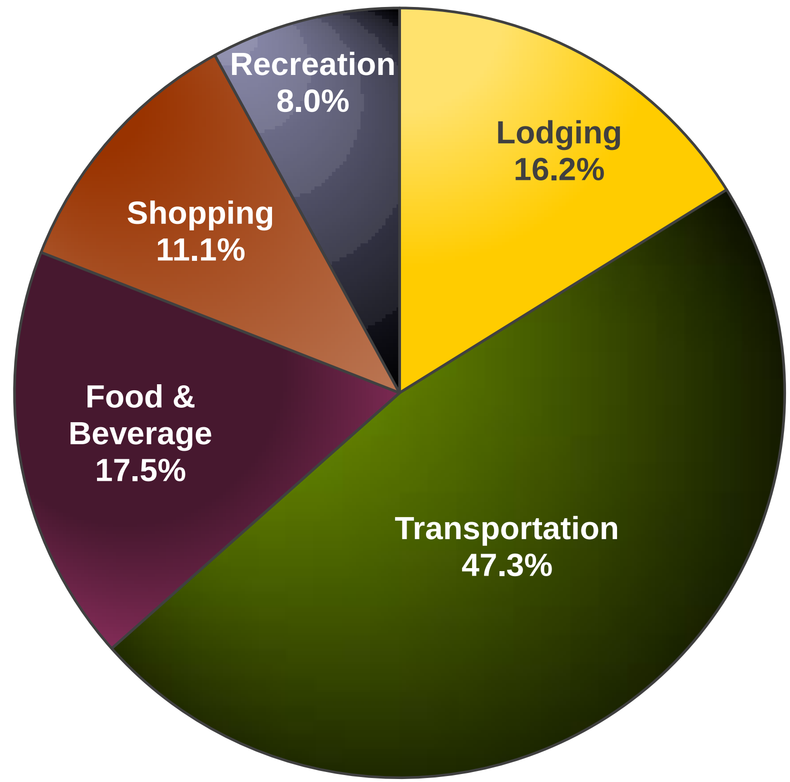
Lehigh Valley Impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2012					
Lehigh	1,083.7	12,371	428.9	100.3	98.4
Northampton	869.3	9,831	388.4	86.7	87.5
Lehigh Valley	1,952.9	22,201.5	817.3	187.0	185.9
Percent Change	5.5%	3.3%	5.8%	9.4%	7.7%
2011					
Lehigh	1,049.4	12,112	415.7	94.7	94.3
Northampton	801.8	9,379	356.6	76.3	78.2
Lehigh Valley	1,851.2	21,491.0	772.3	171.0	172.6

Philadelphia & The Countryside

- Philadelphia and The Countryside region is comprised of the following counties: Bucks, Chester, Delaware, Montgomery, and Philadelphia.
- Travelers spent $8.7 billion in Philadelphia & The Countryside region in 2012 – a 2.1% increase from 2011 and a new record high.
- The Philadelphia & The Countryside region had the highest proportion of traveler spending on transportation and lodging, and the lowest shares on recreation, food & beverages, and shopping of PA's 11 tourism regions.

Philadelphia & The Countryside Region Spending by Category

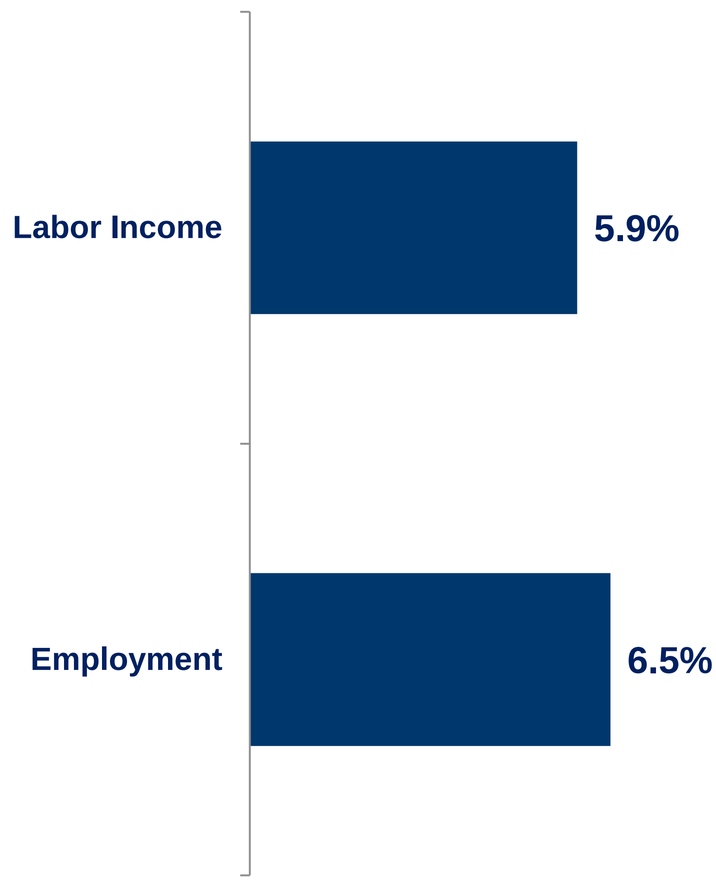


Source: Tourism Economics

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 5.9% in 2012, while the industry's share of the region's employment base was 6.5%.
- The region had the highest number of travel-supported jobs among PA's 11 tourism regions, but the region ranked last in travel-supported employment share as a result of the size and great diversity of its economy.

Travel Industry Share of Regional Economy



Philadelphia & The Countryside Timeline

Tourism Industry Spending (Millions of dollars)								
County	2005	2006	2007	2008	2009	2010	2011	2012
Bucks	582.1	602.8	640.3	704.5	629.2	673.2	728.0	743.6
Chester	543.8	557.7	595.5	680.1	608.2	646.7	684.2	713.8
Delaware	498.1	510.7	558.2	613.9	530.4	564.5	654.5	645.8
Montgomery	985.2	1,014.0	1,079.3	1,176.2	1,014.2	1,070.8	1,180.2	1,221.8
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
Philadelphia & The Countryside	7,010.6	7,359.0	7,753.2	8,509.5	7,518.1	7,999.1	8,537.9	8,714.9
Percent Change		5.0%	5.4%	9.8%	-11.7%	6.4%	6.7%	2.1%

Tourism Industry Employment Impacts								
County	2005	2006	2007	2008	2009	2010	2011	2012
Bucks	8,054	8,280	8,545	8,795	8,482	8,389	8,568	8,717
Chester	6,790	6,944	7,172	7,286	6,983	6,823	6,879	7,052
Delaware	6,998	6,965	6,931	6,936	6,701	6,697	6,936	7,158
Montgomery	12,599	12,822	12,909	12,983	12,380	12,159	12,337	13,008
Philadelphia	31,855	32,640	33,719	33,755	31,929	32,221	32,669	33,629
Philadelphia & The Countryside	66,295.5	67,651.4	69,275.4	69,755.3	66,474.3	66,288.7	67,389.8	69,563.8
Percent Change		2.0%	2.4%	0.7%	-4.7%	-0.3%	1.7%	3.2%

Philadelphia & The Countryside Visitor Spending

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2012						
Bucks	123.1	160.6	105.9	76.7	277.2	743.6
Chester	123.7	151.0	98.0	74.2	267.0	713.8
Delaware	87.5	136.2	83.9	73.8	264.4	645.8
Montgomery	289.5	230.6	144.2	86.8	470.8	1,221.8
Philadelphia	783.8	847.7	534.1	382.7	2,841.6	5,389.9
Philadelphia & The Countryside	1,407.6	1,526.1	966.1	694.1	4,121.0	8,714.9
Percent Change	6.8%	3.1%	3.1%	3.6%	-0.3%	2.1%
2011						
Bucks	114.4	162.4	102.8	81.2	267.3	728.0
Chester	119.5	150.9	95.6	73.7	244.4	684.2
Delaware	85.4	137.3	87.0	73.7	271.1	654.5
Montgomery	271.1	224.6	142.2	84.4	457.9	1,180.2
Philadelphia	727.2	804.5	509.5	356.8	2,893.0	5,290.9
Philadelphia & The Countryside	1,317.6	1,479.7	937.1	669.8	4,133.7	8,537.9

Philadelphia & The Countryside TSA

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2012				
Bucks	743.6	4.5	34.4	782.5
Chester	713.8	3.7	33.1	750.6
Delaware	645.8	3.3	29.9	678.9
Montgomery	1,221.8	6.9	56.6	1,285.3
Philadelphia	5,389.9	57.2	249.6	5,696.7
Philadelphia & The Countryside	8,714.9	75.7	403.6	9,194.1
Percent Change	2.1%	-0.6%	-1.6%	1.9%
2011				
Bucks	728.0	4.6	35.0	767.6
Chester	684.2	3.7	32.9	720.7
Delaware	654.5	3.4	31.4	689.3
Montgomery	1,180.2	6.9	56.7	1,243.8
Philadelphia	5,290.9	57.5	254.1	5,602.5
Philadelphia & The Countryside	8,537.9	76.1	410.0	9,024.0

Philadelphia & The Countryside Impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2012					
Bucks	743.6	8,717	244.0	51.1	47.8
Chester	713.8	7,052	222.3	47.2	44.3
Delaware	645.8	7,158	243.8	47.5	46.0
Montgomery	1,221.8	13,008	447.8	88.0	84.9
Philadelphia	5,389.9	33,629	1,589.4	382.1	321.1
Philadelphia & The Countryside	8,714.9	69,563.8	2,747.4	615.9	544.0
Percent Change	2.1%	3.2%	4.2%	4.4%	2.8%
2011					
Bucks	728.0	8,568	239.3	49.2	47.0
Chester	684.2	6,879	212.6	44.4	42.4
Delaware	654.5	6,936	232.2	45.7	44.6
Montgomery	1,180.2	12,337	394.8	80.1	77.1
Philadelphia	5,290.9	32,669	1,557.7	370.5	318.2
Philadelphia & The Countryside	8,537.9	67,389.8	2,636.6	589.9	529.3

Philadelphia & The Countryside Impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2012					
Bucks	782.5	15,277	557.8	89.6	96.5
Chester	750.6	12,212	482.4	83.2	89.4
Delaware	678.9	12,707	531.1	83.8	93.0
Montgomery	1,285.3	22,203	932.8	155.1	171.6
Philadelphia	5,696.7	53,964	2,913.0	646.1	648.2
Philadelphia & The Countryside	9,194.1	116,363.2	5,417.1	1,057.8	1,098.7
Percent Change	1.9%	2.3%	2.9%	4.2%	2.8%
2011					
Bucks	767.6	15,102	551.8	86.5	94.9
Chester	720.7	12,005	468.8	78.4	85.7
Delaware	689.3	12,438	514.7	80.6	90.1
Montgomery	1,243.8	21,373	854.4	141.0	155.7
Philadelphia	5,602.5	52,802	2,872.9	629.0	642.2
Philadelphia & The Countryside	9,024.0	113,720.5	5,262.6	1,015.4	1,068.7

Methodology and Background

TOURISM ECONOMICS
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Methods and data sources

- Domestic visitor expenditure estimates are provided by Longwoods International representative survey of US travelers. These are broken out by sectors (lodging, transport at destination, food & beverage, retail, and recreation), by purpose (business and leisure), and by length of stay (day and overnight).
- Tourism Economics then adjusts these levels of spending based on a range of known measures of tourism activity:
    - Overseas visitor spending (source: OTTI, TE)
    - Canada visitor 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: BEA, BLS, Census)

Methods and data sources

- An IMPLAN model was compiled for the State of Pennsylvania. This traces the flow of visitor-related expenditures through the local economy and their effects on employment, wages, and taxes. IMPLAN also quantifies the indirect (supplier) and induced (income) impacts of tourism.
- All results are benchmarked and cross-checked and adjusted based on the following:
    - US Bureau of Labor Statistics and Bureau of Economic Analysis (employment and wages by industry)
    - US 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 Bureau of Labor 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)

US 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 US and in the United Nations Project Link.
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