The Economic Impact of Travel and Tourism in Pennsylvania

Tourism Satellite Account
Calendar Year 2010

February 2012

TOURISM ECONOMICS
AN OXFORD ECONOMICS COMPANY

Table of Contents

Model and Data Revisions

The goal of every economic forecasting model is to provide the most precise and accurate representation of the economy. As data is revised and additional knowledge and insight about the economy and the interaction of its many components is gained, revisions are made to the model and data inputs that result in changes to previous results.

Several updates and revisions have been incorporated for Pennsylvania's 2010 economic impact of travel and tourism report. As a result, some figures presented in this report differ from those in the 2009 report.

The improvements have resulted in minimal changes to the estimates of state tourism spending and the year-over-year changes between travel segments and spending categories. The state-level results provide more market segment spending detail and revisions to the tourism impact from adjustments to accommodations sector employment.

Further refinements were made to the county model including the incorporation of additional data influencing the county results. The county-level estimates presented in the 2009 report have been revised and are incorporated in this report.

Challenges in measuring tourism economy

Explanation of Tourism Satellite Account

Key Definitions

TOURISM ECONOMICS

AN OXFORD ECONOMICS COMPANY

Why quantify the travel and tourism economy?

- By monitoring and quantifying travel and tourism'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, travel and tourism must be measured in the same categories as other economic sectors – i.e., tax generation, employment, wages, and gross domestic product.

Why 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 is different 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.

The Tourism Satellite Account

- The TSA/TTSA deals with the challenge of measuring tourism in two important ways:
  - Defines the size and scope of the travel and tourism economy.
  - Provides a methodology for calculating the contributions of the travel and tourism industry to a state's or nation's gross domestic product (GDP) in a way consistent with the national economic accounts.
- The TSA can be used to:
  - Determine the shares of goods and services sold to travelers versus the shares sold to local residents.
  - Assess the effects of travel and tourism on an area's economy.
  - Examine the relationship among the various travel and tourism sectors.
  - Compare the travel and tourism industry to other industries in a manner consistent with the way in which the other industries are measured.

The Tourism Satellite Account

Benefits of using the TSA methodology include:

- Enables comparisons of the importance of 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 tourism over time.
- Monitors strength by tracking 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 sales made to travelers.
4. **Travel and Tourism Economy:** The value of traveler activity plus government spending and capital investment in support of 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 tourism activity within a specific geographic area to identify changes in sales, tax revenues, income and jobs derived from traveler activity.
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 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.

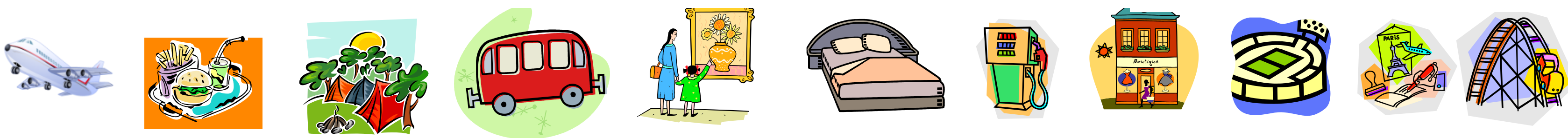
Key definitions

7. **Total Impact:** The sum of the direct, indirect and induced impacts.
8. **Visitor:** Used interchangeably with the term “traveler.”

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**.

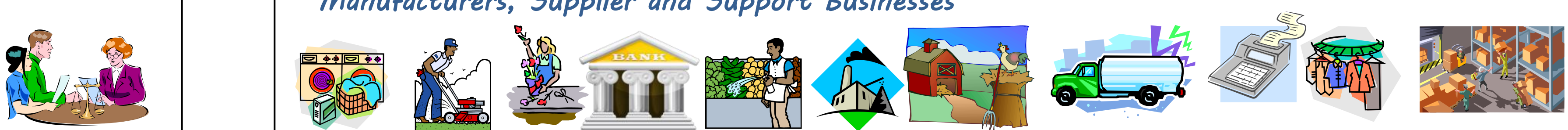
Businesses Catering to the Traveling Public



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**.

Wages paid to employees

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**.

State Overview

Pennsylvania's key economic impact results

- Tourism is an integral component of the Pennsylvania economy.
- Visitor spending totaled $34.2 billion in 2010, a 9.2% increase from 2009.
- The 2010 increase in visitor spending recovered roughly 60% of the nearly $5 billion drop in sales during the 2008-2009 recession.
- The **total** impact of Pennsylvania's travel and tourism industry was an estimated $35.9 billion, with capital investment, government spending, and personal consumption expenditures related to tourism included.
- Pennsylvania's tourism economy supported 452,340 jobs in total, representing 6.34% of total employment compared to 6.27% in 2009.
- Including indirect and induced impacts, tourism in Pennsylvania generated $3.6 billion in state and local taxes and $3.7 billion in federal taxes last year.
- The state's travel industry directly accounted for $13.4 billion of Pennsylvania's 2010 gross domestic product (GDP).

General 2010 travel themes

- 2010 proved to be a classic recovery year for the US travel and tourism industry. With affordable travel prices and a bit more economic stability, travel rebounded along with spending per trip.
- Visits reached record highs and spending among all industry sectors rose above and beyond trip growth – meaning people spent more when they were travelling – but spending was still below the level last seen in 2008.
- Pennsylvania's domestic (US travelers) trip count rose 3.8%, offsetting the 3.6% decline in 2009.
- As in most recoveries, employment growth did not match spending growth. Business sales may have recovered but the still uncertain economic environment subdued tourism sector hiring and investing with businesses hesitant to add workers or make substantial investments in plants and equipment until they are more certain the economic recovery is going to last.

Detailed State Results:

Total US & International Traveler Spending

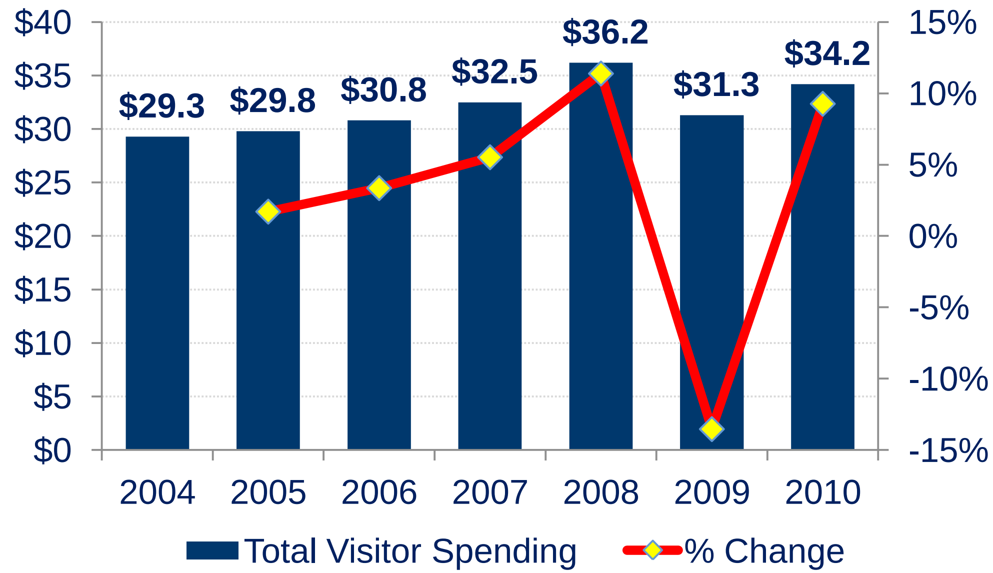
- Trends
- Travel Segments
- Spending Categories

TOURISM ECONOMICS
AN OXFORD ECONOMICS COMPANY

Key trends in 2010

- Spending by PA's leisure and business travelers rose 9.2% to $34.2 billion in 2010, but remained $2 billion below 2008's record high.
- Business day-trip travel registered the strongest spending increase percentage-wise in 2010, while overnight leisure travel had the largest increase in dollar terms.
- Several factors drove spending growth:
  - Visitation increases
  - Price increases, e.g., gasoline
  - Spending increases separate from price increases, i.e., travelers purchased more goods and services and/or bought more expensive items.

Traveler Spending
In billions of US dollars



Includes spending by both domestic and international travelers.

Traveler spending by visitor type, 2009 & 2010

- Overnight leisure travel is PA's dominant market segment in terms of the total dollar amount of spending, as well as the growth in total dollars ($1.8 billion) spent between 2009 and 2010.

Traveler Spending by Visitor Type (in billions of US dollars)			
2010	**Leisure**	**Business**	**Total**
Overnight	$17.4	$4.4	$21.8
Day-Trip	$11.2	$1.1	$12.3
Total	$28.7	$5.5	$34.2
2009			
Overnight	$15.6	$4.2	$19.8
Day-Trip	$10.5	$0.9	$11.5
Total	$26.2	$5.1	$31.3
Percent Change			
Overnight	11.3%	$6.0%	10.2%
Day-Trip	6.9%	16.1%	7.6%
Total	9.5%	7.9%	9.2%

Includes total spending by both domestic and international traveleers.

2010 Traveler spending by market segment

- Leisure travelers accounted for 84% of PA's total visitor spending in 2010.
- Overnight visitors spent $21.8 billion in PA, or close to two-thirds of the total.
- International travelers from Canada and overseas markets spent $3.5 billion in PA in 2010, or 10% of all visitor spending.

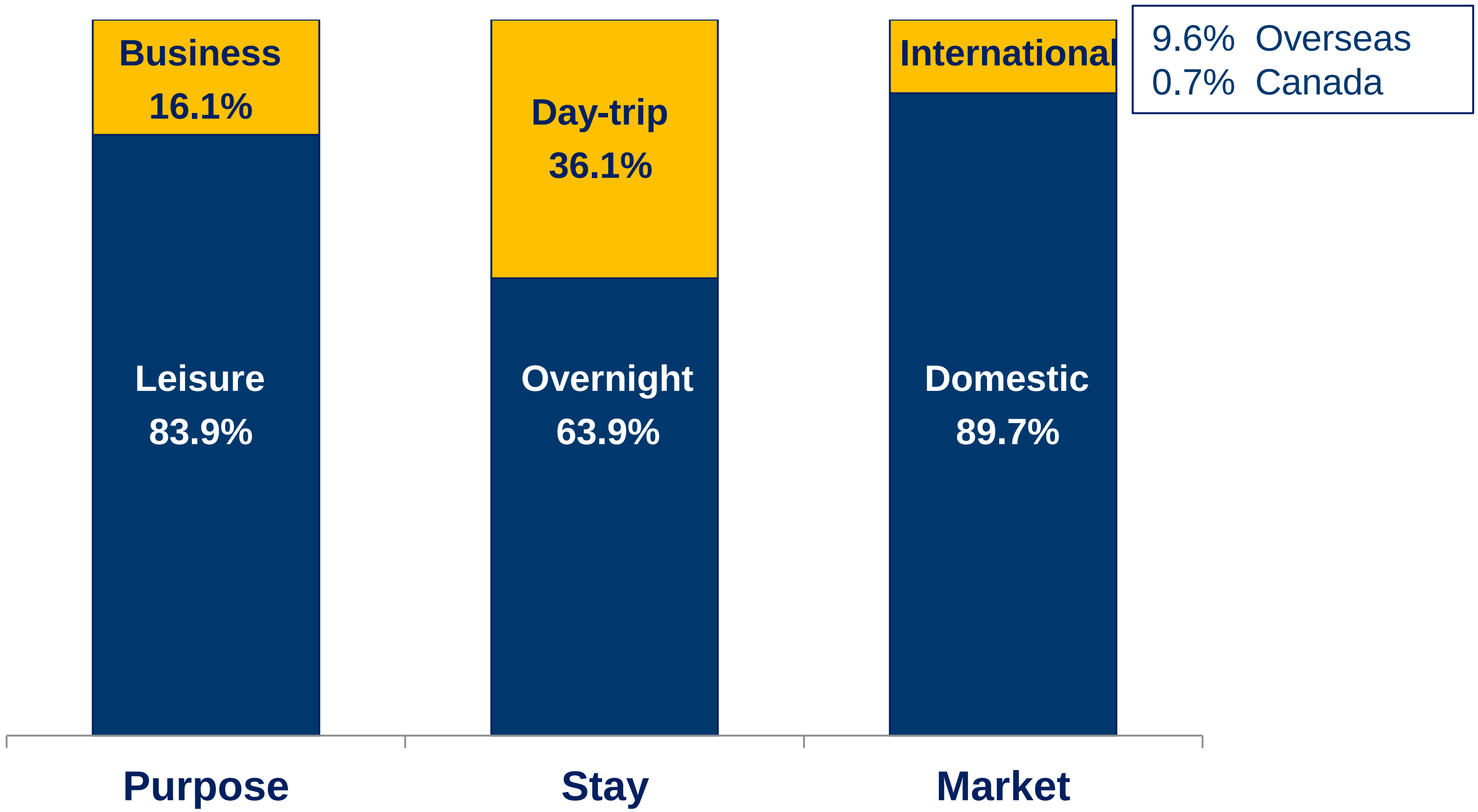
2010 Traveler Spending by Segment
(in billions of US dollars)

Purpose		Stay		Market	
Leisure	$28.7	Overnight	$21.8	US Domestic	$30.6
Business	$ 5.5	Day-trip	$12.3	Overseas	$ 3.3
				Canada	$ 0.2
Growth Rate					
Leisure	9.5%	Overnight	10.2%	US Domestic	9.2%
Business	7.9%	Day-trip	7.6%	Overseas	7.2%
				Canada	52.7%
Market Share					
Leisure	83.9%	Overnight	66.5%	US Domestic	89.7%
Business	16.1%	Day-trip	33.5%	Overseas	9.6%
				Canada	0.7%

Includes total spending by both domestic and international travelers.

Traveler spending by market segment

- US domestic, leisure, and overnight travel were the dominant segments for PA's travel and tourism industry in 2010.



Includes spending by both domestic and international travelers.

Trends in traveler spending by spending category

- Spending rose in all the major categories of traveler spending in 2010, with the strongest percentage increase in spending for recreation goods and services, with spending on non-air transportation registering the strongest dollar increase.
- PA's hotel room demand rose 9.4% in 2010, but the increase in lodging spending was constrained to a certain degree by the continued softness in rates.
- PA's spending per trip grew 5.1%, while the number of visitors rose 3.9% indicating the increase in total spending was due to more than just the increase in the number of travelers (e.g., travelers stayed longer and/or spent more during their trip).

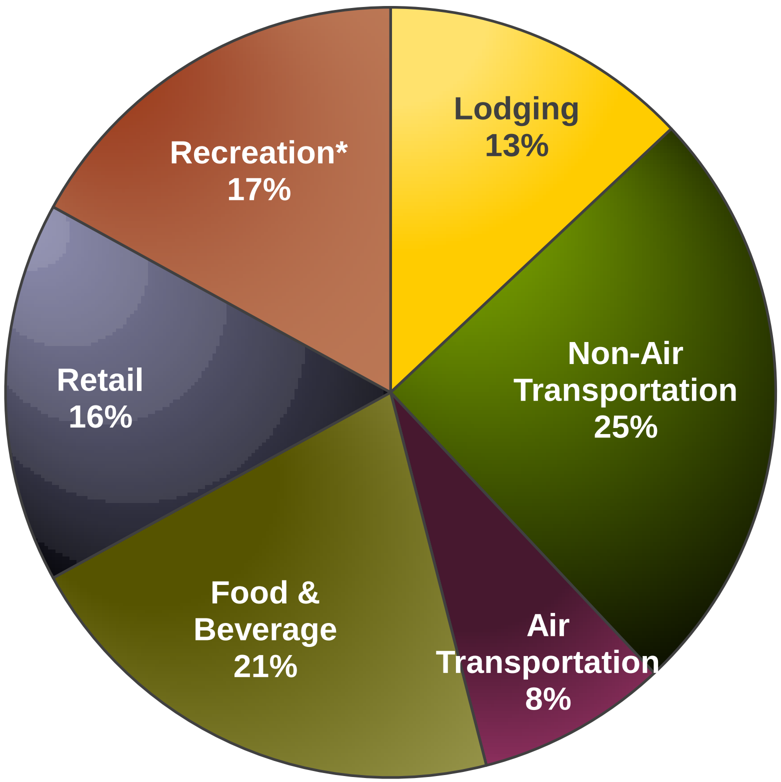
Traveler Spending by Category
(in billions of US dollars)

Spending Category	2008	2009	2010	% Change
Lodging	$4.604	$4.046	$4.380	8.2%
Non-Air Transportation	$9.755	$7.970	$8.803	10.4%
Air Transportation	$2.637	$2.544	$2.681	5.4%
Food & Beverage	$7.442	$6.602	$7.084	7.3%
Retail	$6.079	$5.145	$5.551	7.9%
Recreation	$5.637	$4.971	$5.666	14.0%
TOTAL	**$36.154**	**$31.278**	**$34.165**	**9.2%**

Includes spending by both domestic and international travelers.

2010 Traveler spending by spending category

Traveler Spending by Category

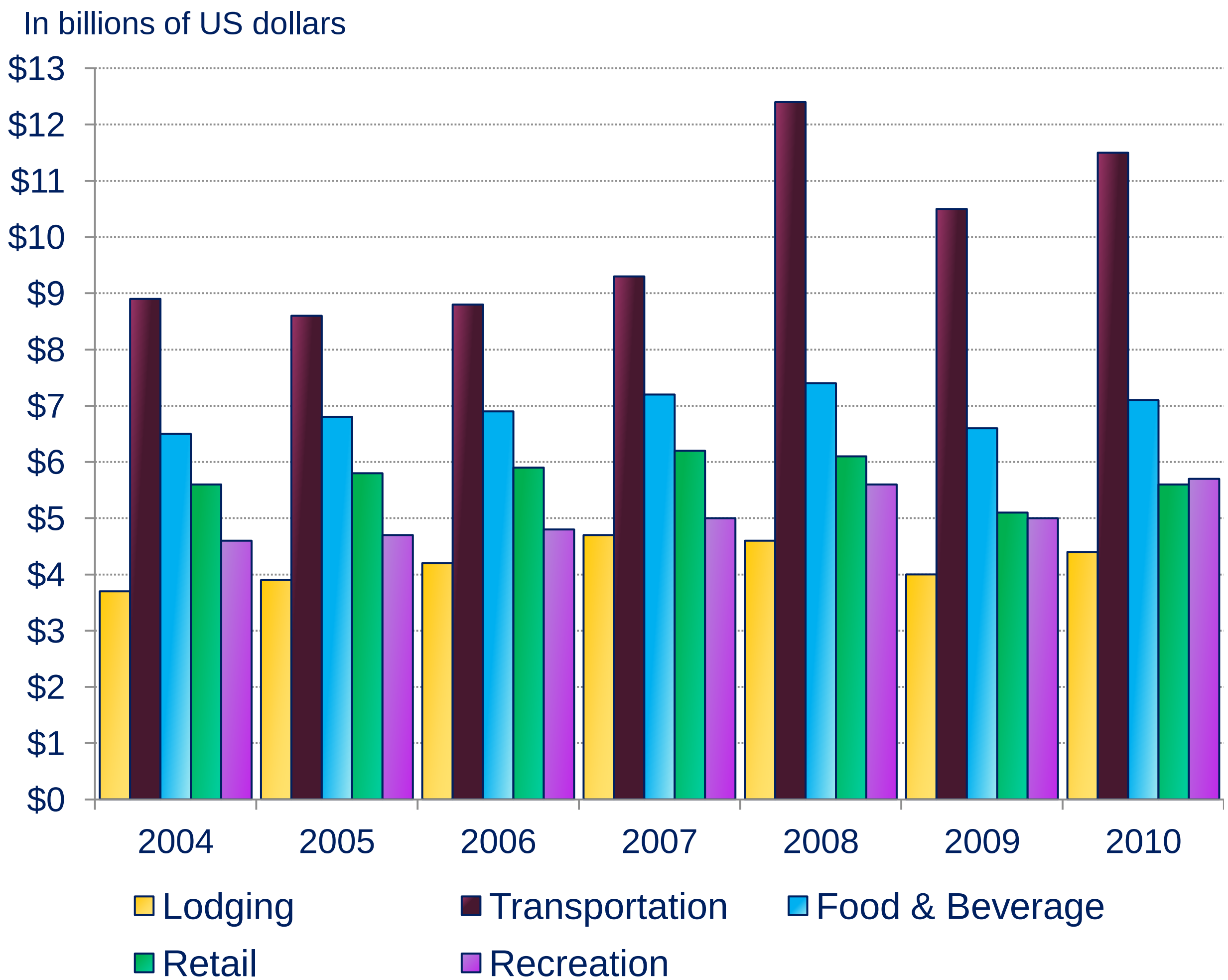


Recreation includes spending at attractions and on activities including both indoor (e.g., bowling) and outdoor (e.g., hiking).

Includes spending by both domestic and international travelers.

- Air and non-air transportation combined accounted for roughly a third of traveler spending in PA in 2010.
- PA travelers spent a little over one-fifth of their total travel budgets on Food & Beverages in 2010 – about the same share as in the preceding two years.
- The share of traveler spending on recreational activities increased over the prior two years – from 15.6% in 2008 and 15.9% in 2009 to16.6% in 2010.

Traveler spending by spending category

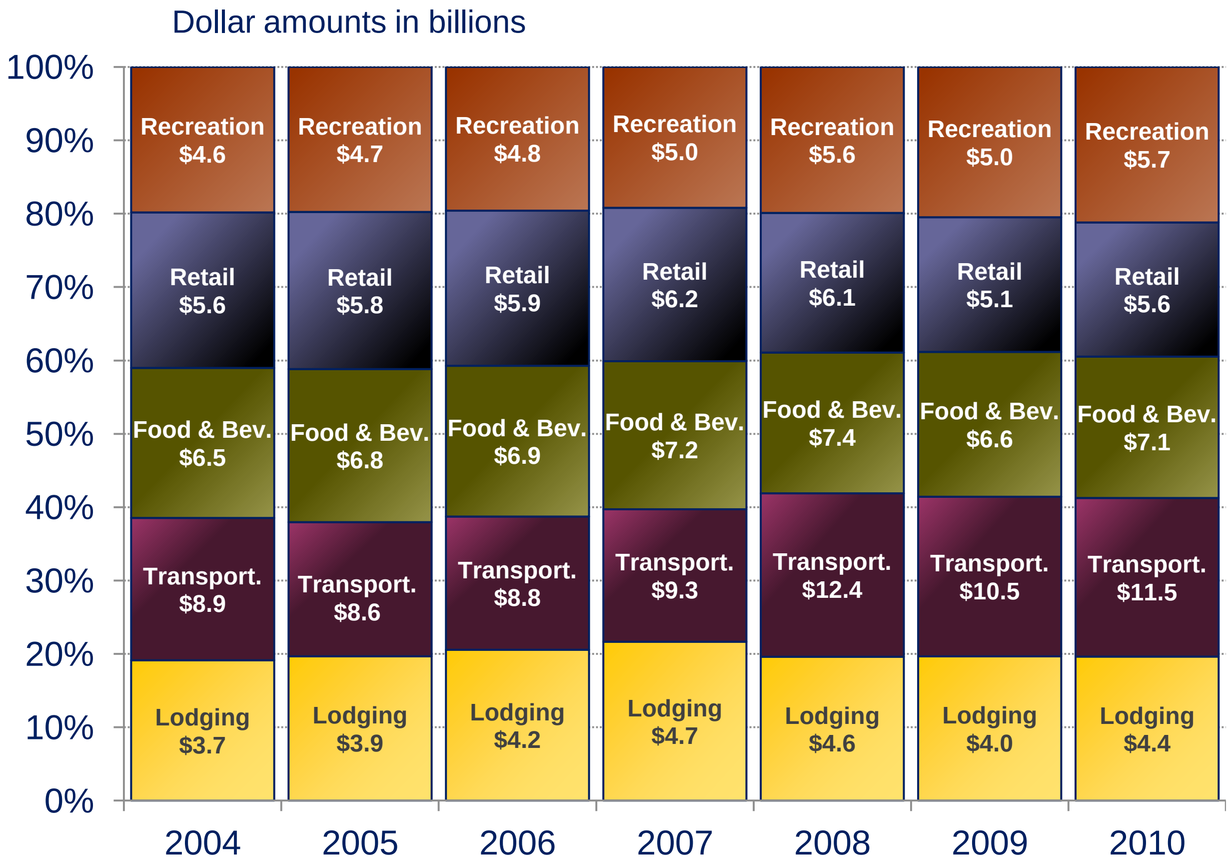


Includes spending by both domestic and international travelers.

- Recreation sector spending levels rose to record levels in 2010 – the only spending category to exceed 2008's record levels.
- Fuel prices were a major factor in the increase in total spending in 2008, the fall in 2009, and the increase again in 2010, with the transportation category registering the largest changes, in dollar terms.

Source: Longwoods International, Tourism Economics, and US Office of Travel and Tourism Industries (OTTI)

Percent of total spending by spending category



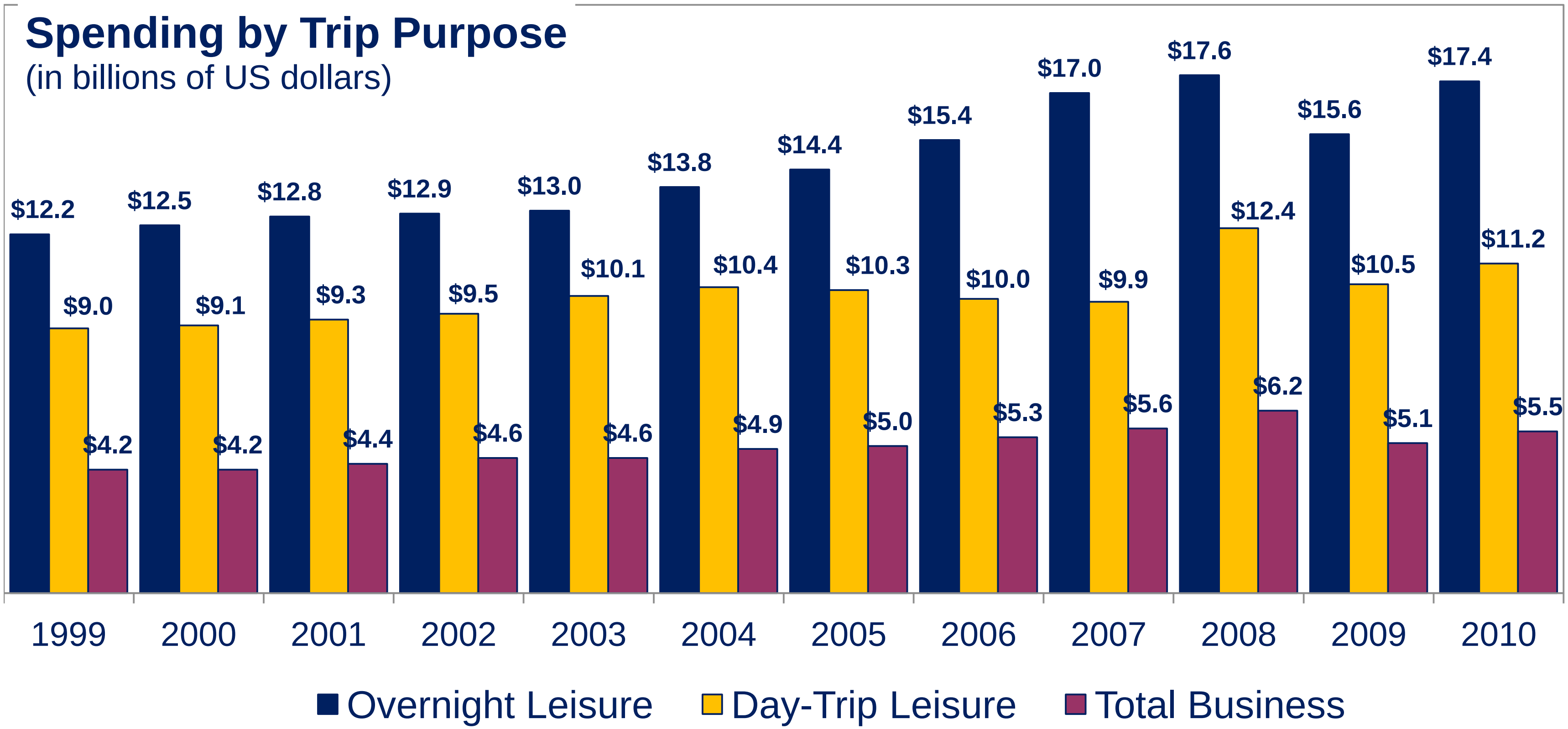
Includes spending by both domestic and international travelers.

- As fuel prices increased in the latter half of the decade, transportation accounted for a higher share of total traveler spending.
- The share of traveler spending on lodging dropped in the latter half of the decade as lodging prices lagged during the economic recovery despite strong demand.

Source: Longwoods International, Tourism Economics, and US Office of Travel and Tourism Industries (OTTI)

Total traveler spending by trip purpose

- Overnight leisure travel largely drove the increase in total traveler spending in 2010 with a spending level just below 2008's record high.
- Day-trip leisure and business overnight travel grew in 2010, but remained below 2008's record high totals.

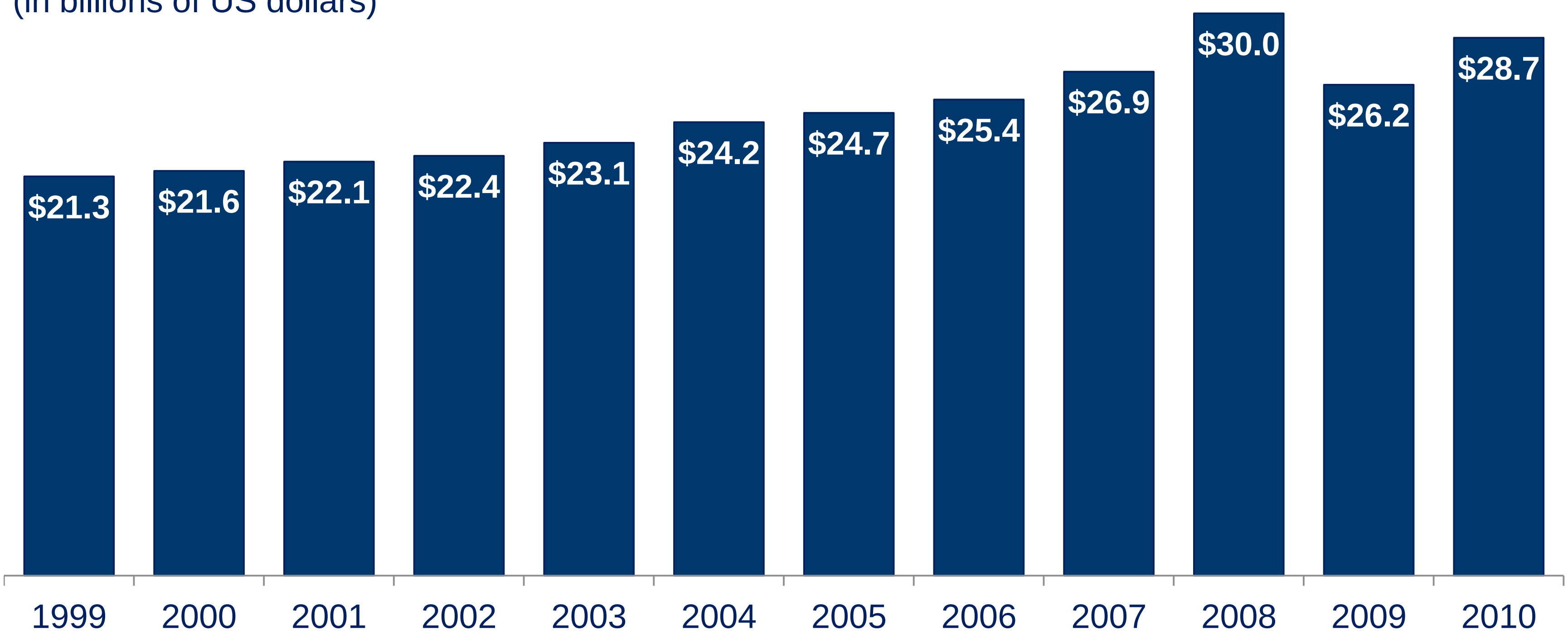


Includes spending by both US domestic and international travelers.

Total leisure traveler spending

- Total leisure traveler spending rebounded in 2010, growing by 9.5% and offsetting roughly two-thirds of the $3.8 billion drop in 2009.
- Total leisure spending in 2010 was the second highest level on record.

Total leisure traveler spending
(in billions of US dollars)

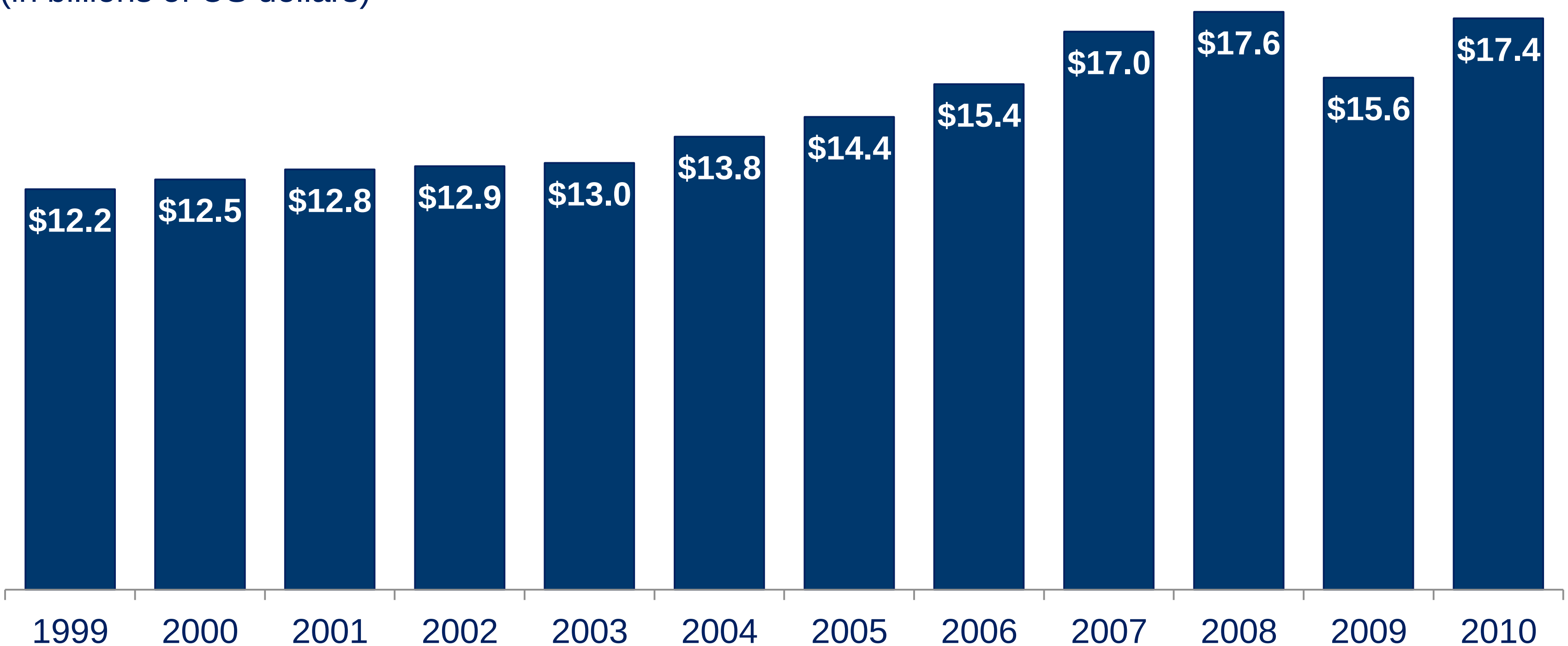


Includes spending of both US domestic and international travelers.

Overnight leisure traveler spending

- Total spending by overnight leisure travelers rose 11.3% in 2010, offsetting 90% of the $2.0 billion drop in 2009.
- Total overnight leisure spending in 2010 was the second highest level on record.

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

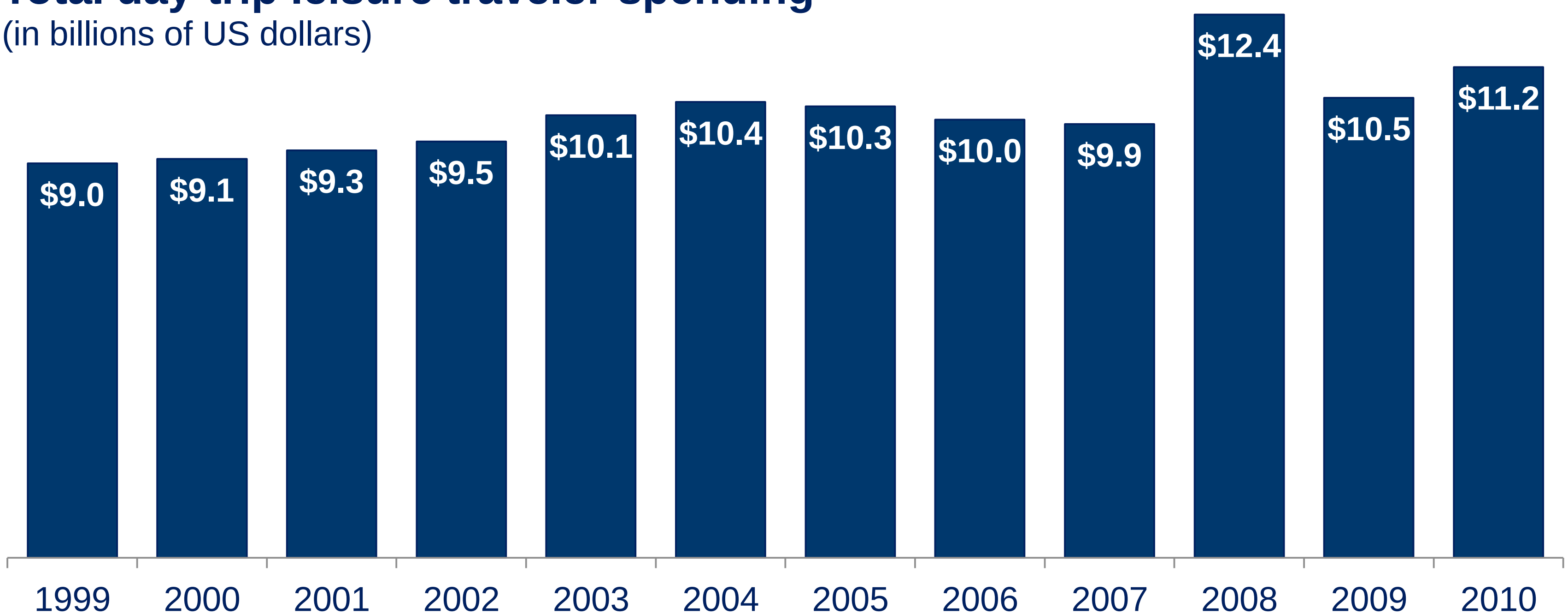


Includes spending of both US domestic and international travelers.

Day-trip leisure traveler spending

- Total spending by PA's day-trip leisure travelers rose 6.8% in 2010, offsetting close to 40% of the $1.9 billion drop in 2009.
- Total day-trip leisure spending in 2010 was the second highest level on record.

Total day-trip leisure traveler spending
(in billions of US dollars)



Includes spending of both US domestic and international travelers.

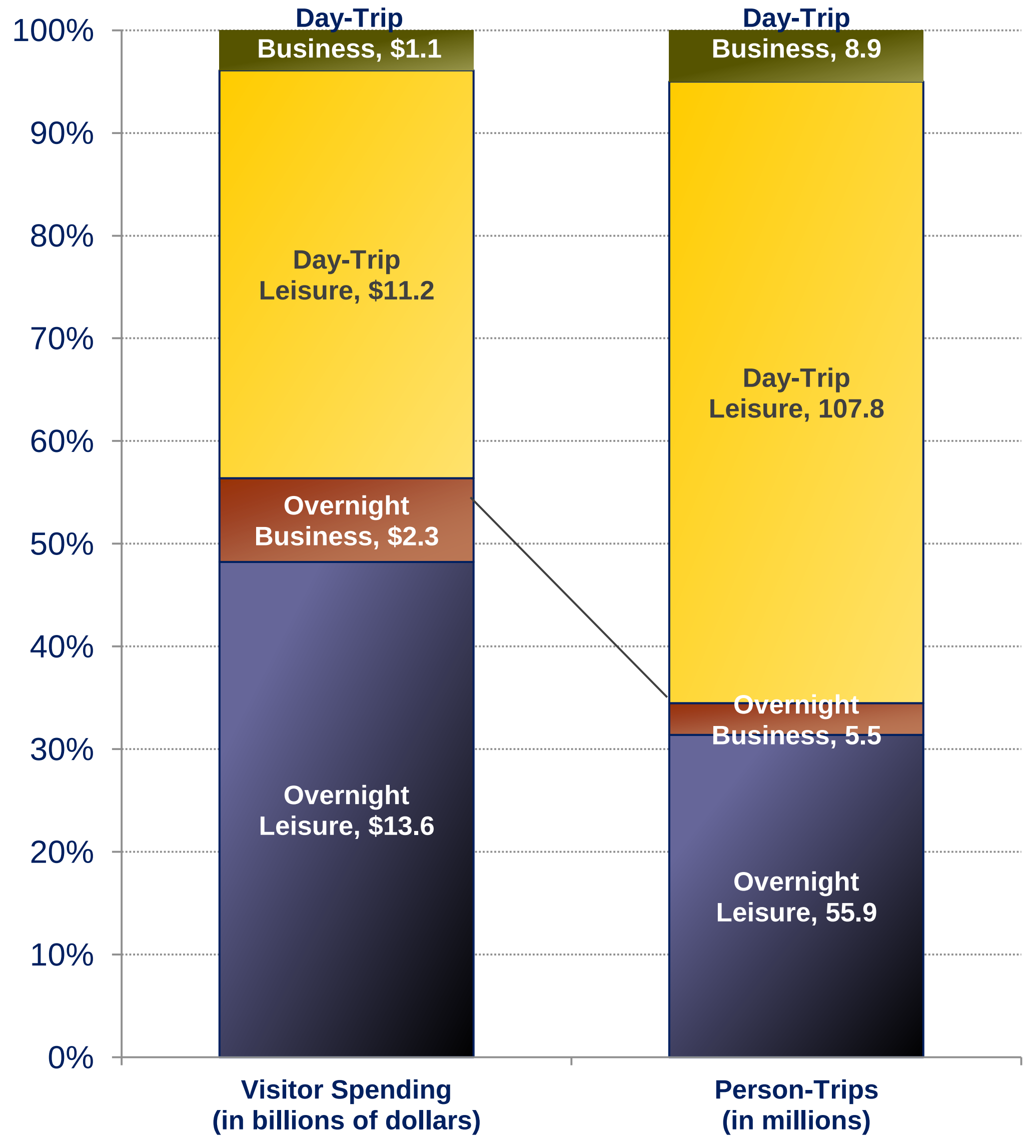
The Domestic Market in Detail

Domestic travelers

- PA's total domestic (US travelers) visits rose 3.8% to 179 million person-trips in 2010.
- Overnight visits rose 3.6% to just under 62 million person-trips.
- Day-trips rose 3.9% after falling 4.1% in 2009.
- Domestic spending rose 9.2% to $30.2 billion in 2010, after falling 14% between 2008 and 2009. *(It is important to note the following charts do not include the portion of travel expenses incurred by visitors in traveling to Pennsylvania, but is nonetheless attributable to Pennsylvania, e.g., the portion of an airline visitor ticket that accrues to PA airports, along with the PA portion of the ticket a traveler bought leaving the state. The following tables are based on survey responses that do not capture this portion of transportation costs since the visitor spending survey cannot break out where the airline ticket spending should apply.)*
- Per person-trip spending rose 5.6%.
- Both the number of trips and spending per trip showed healthy growth in 2010.

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, overnight business, day-trip leisure, and day-trip business.
- While Overnight Leisure visits comprised 31% of all visits in 2010, they accounted for a far higher share (48%) of PA's total domestic visitor spending.



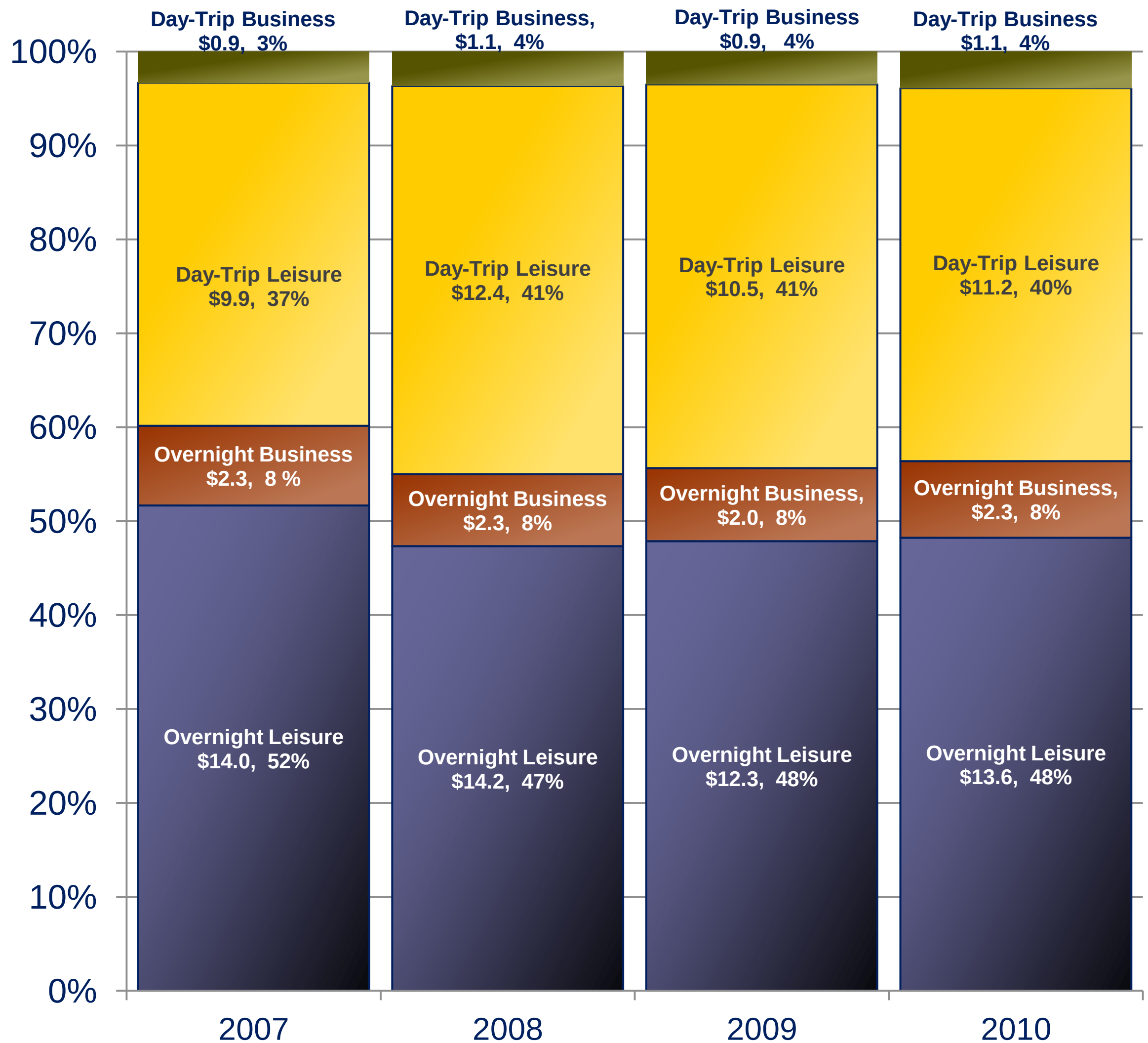
Source: Longwoods International

Domestic spending trends by trip type

- Overnight leisure travelers continued to account for nearly half of PA's total domestic traveler spending in 2010.
- Overnight leisure's share of domestic traveler spending rose over the past two years.
- The two overnight sectors (business and leisure) had slight gains in share in 2010.

Domestic traveler spending by trip type

In billions of US dollars

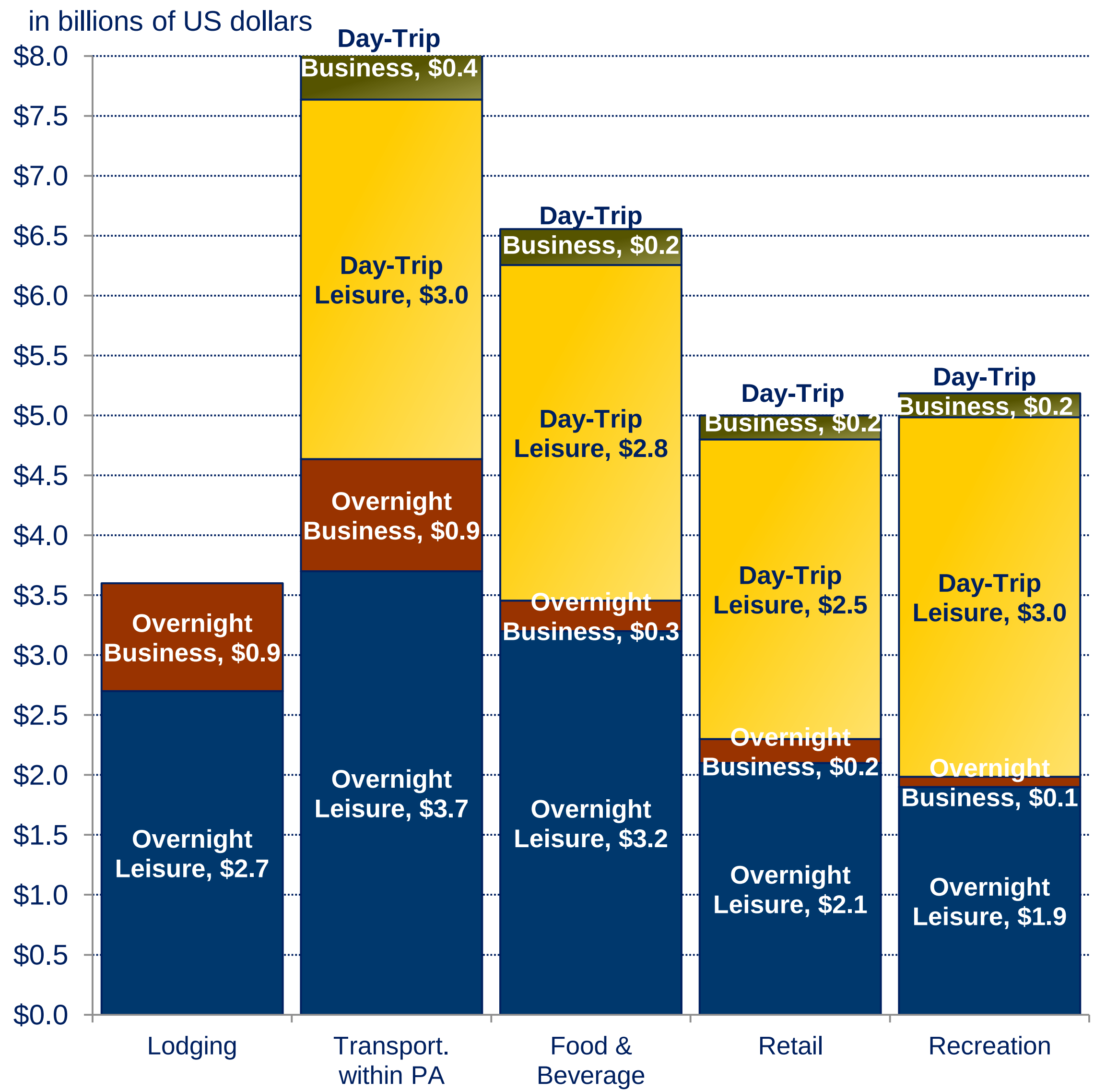


Source: Longwoods International

TOURISM ECONOMICS

2010 domestic traveler spending by spending category and trip type

- Overnight leisure travelers accounted for 76% of PA's total domestic traveler 2010 spending on lodging.
- Overnight leisure travelers accounted for the highest share of total domestic traveler spending on lodging, transportation, and food & beverage.
- Business overnight's 24% share of lodging spending was far higher than the segment's 9% share of overnight person-trips; over a third of the segment's total trip dollars was spent on lodging.
- Without having to pay the cost of lodging, day-trip leisure travelers spent a larger share of their dollars on retail, food & beverage, and recreation than the other travel segments.



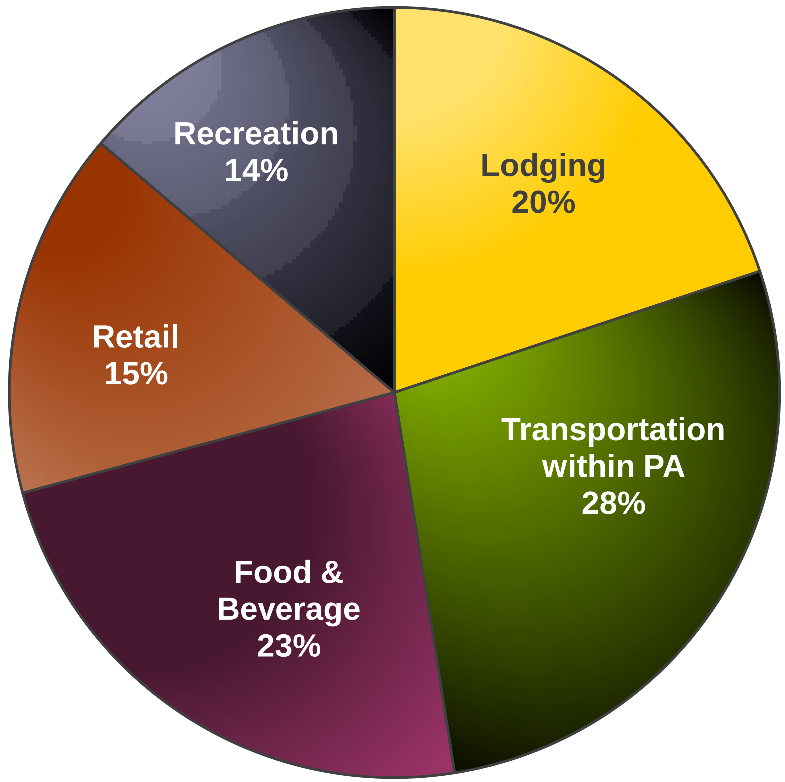
Source: Longwoods International

TOURISM ECONOMICS

Overnight leisure traveler spending by category

- Pennsylvania hosted an estimated 56 million domestic overnight leisure travelers (as measured in person-trips) in 2010.
- These visitors spent $13.6 billion in PA.
- Each visitor spent an estimated $244 per trip.
- Top spending categories included transportation, food & beverage, and lodging.

Domestic Overnight Leisure Traveler Spending by Category

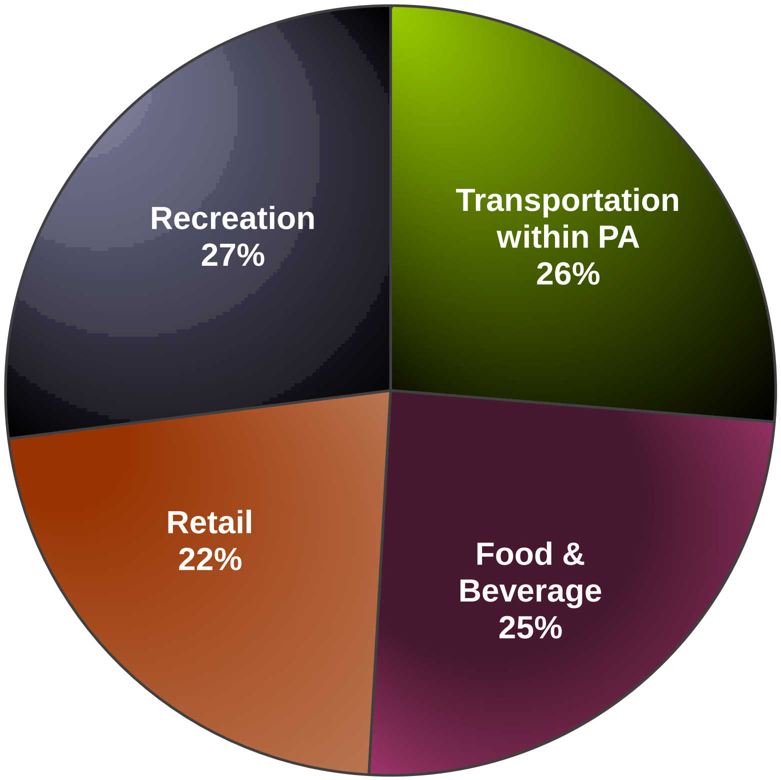


Source: Longwoods International

Day-trip leisure traveler spending by category

- PA hosted an estimated 108 million day-trip leisure travelers (as measured in person-trips) in 2010.
- These visitors spent $11.2 billion in total in Pennsylvania in 2010.
- Each visitor spent an estimated $104 per trip.
- Top spending categories include transportation, recreation, and food & beverages.

Day-Trip Leisure Traveler Spending by Category

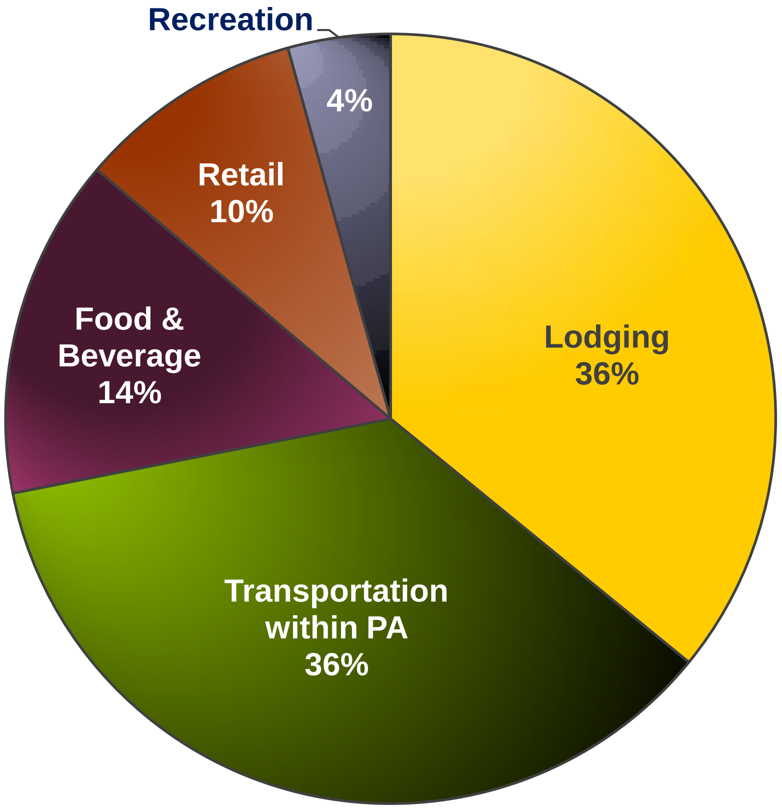


Source: Longwoods International

Overnight business traveler spending by category

- PA hosted an estimated 5.5 million overnight business travelers (as measured in person-trips) in 2010.
- These visitors spent $2.3 billion in total in Pennsylvania in 2010.
- Each visitor spent an estimated $420 per trip – the highest of any trip type.
- Together, lodging and transportation costs accounted for nearly three-fourths of total spending.

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

OXFORD ECONOMICS

Tourism Satellite Account & total tourism demand

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

Tourism Satellite Account 2010 Spending (in billions of US dollars)					
Domestic Traveler Spending	International Traveler Spending	Non-Visitor PCE	Government Support	Capital Investment (CAPEX)	Total*
$30.6	$3.5	$0.2	$0.2	$1.3	$35.9

- 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.

Sales to travelers and total economy impact

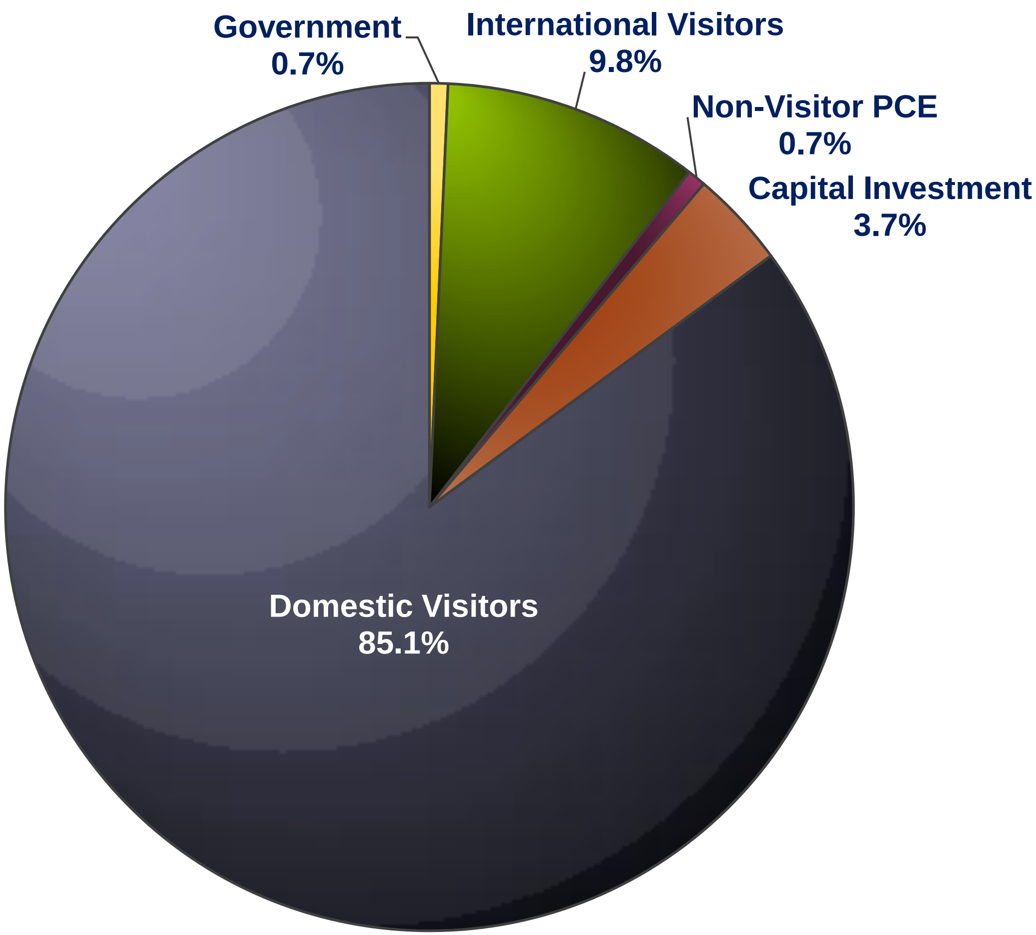
- The primary impact of travel and tourism is driven by sales made to travelers. This allows for apples-to-apples comparisons with other industries.
- The <u>total</u> economic impact of travel and tourism includes capital investment in support of travel, government spending and non-visitor private consumption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

2010 PA Traveler Spending and Total Impact By Expenditure Category
(in millions of US dollars)

Industry	Total Visitor Spending	Total Economy Impact
Non-Air Transportation	$8,802.6	$8,802.6
Food and Beverage	$7,083.5	$7,083.5
Recreation	$5,666.5	$5,666.5
Shopping	$5,551.2	$5,551.2
Lodging	$4,379.9	$4,379.9
Air Transportation	$2,681.1	$2,681.1
Investment	$0	$1,336.9
Government	$0	$243.0
Non-Visitor Personal Consumption Exp.	$0	$237.1
Total	$34,164.7	$35,981.7

Travel and tourism demand by source

Travel and Tourism Demand by Source



- Domestic visitor markets comprised the majority (85%) of PA's travel and tourism sales in 2010.
- International visitor markets contributed close to 10% of PA's travel and tourism sales.
- Capital investment in construction and machinery & equipment related to travel and tourism represented just under 4% of PA's 2010 travel and tourism economy sales.

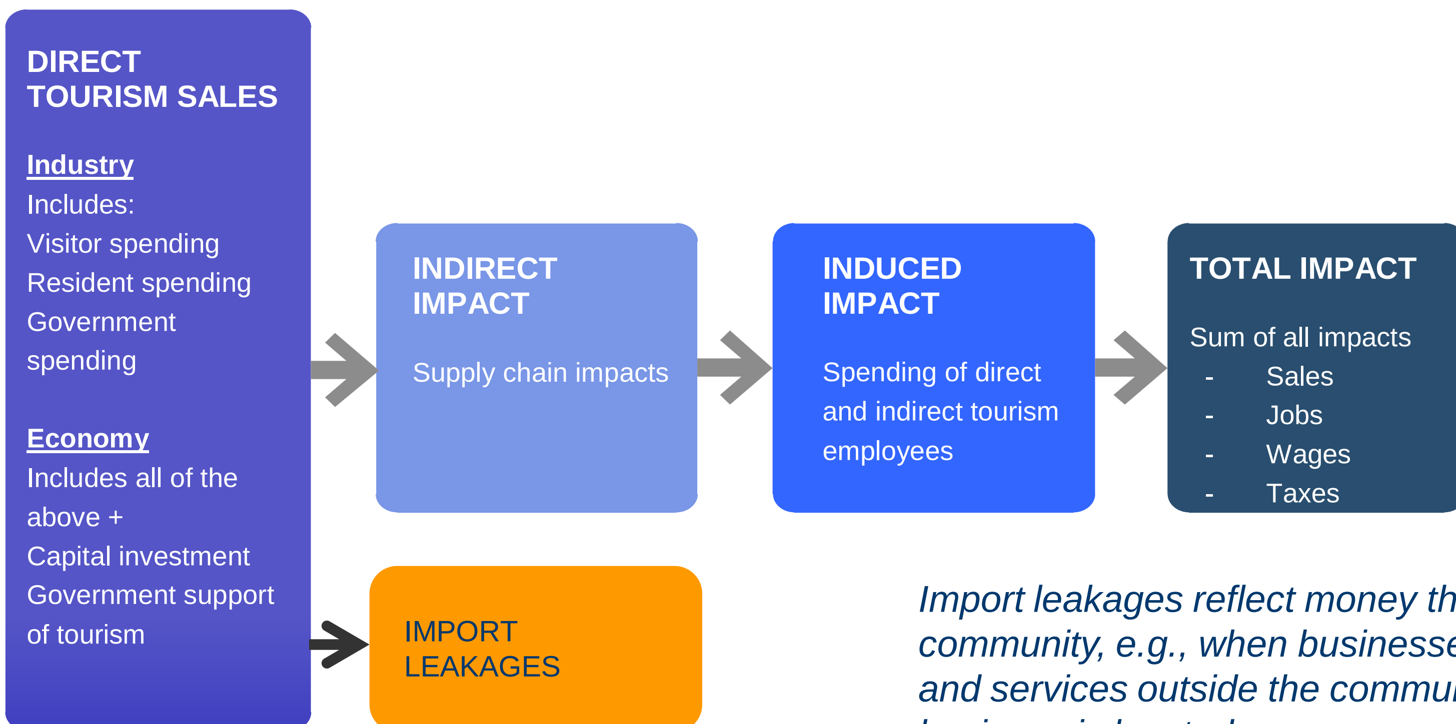
Capital investment

Travel and Tourism Capital Investment (in millions of US dollars)			
	2008	2009	2010
Construction	$1,282	$619	$544
Machinery & Equipment	$ 808	$727	$796
Total	$2,089	$1,346	$1,340

- Over $1.3 billion was invested in Pennsylvania by the travel industry in 2010.
- These investments included hotels, recreational facilities, and related government capital outlays.

Translating sales into impact

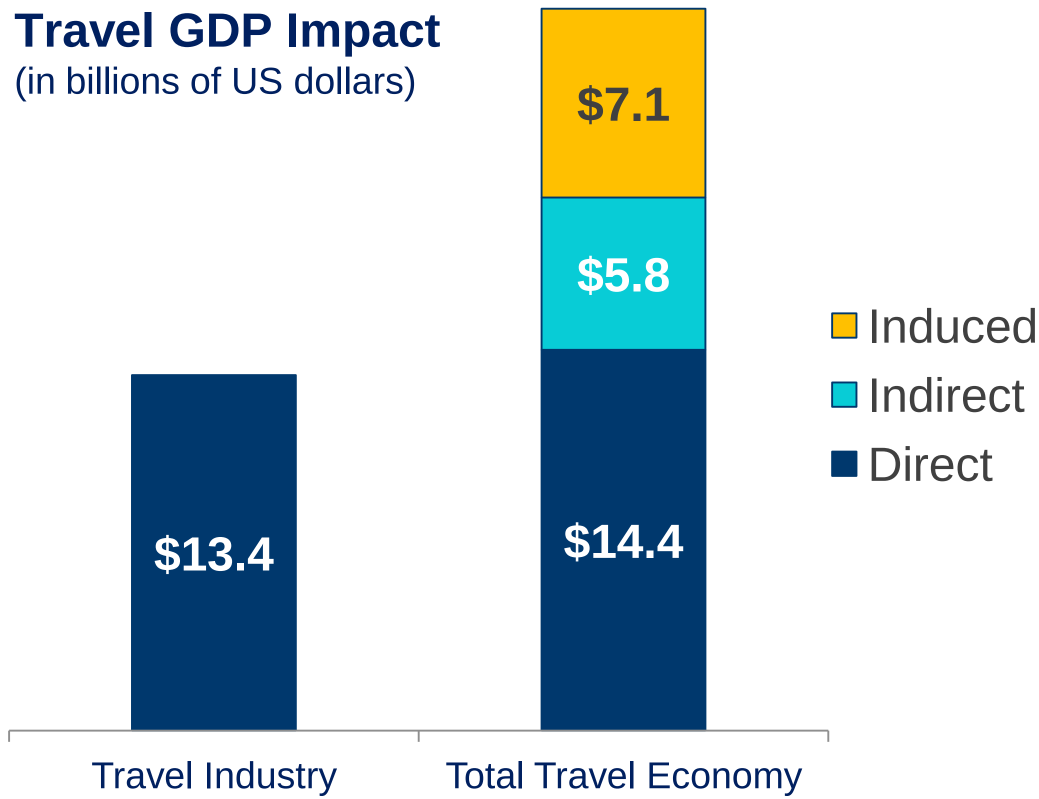
- Direct travel sales flow through the PA economy, generating gross domestic product, jobs, wages, and taxes.
- The indirect impacts measure supply chain (b2b) activity generated by sales.
- The induced impacts measure the effects of travel-generated incomes spent within the state.



Import leakages reflect money that leaves the community, e.g., when businesses buy goods and services outside the community where their business is located.

Travel and tourism GDP impact summary

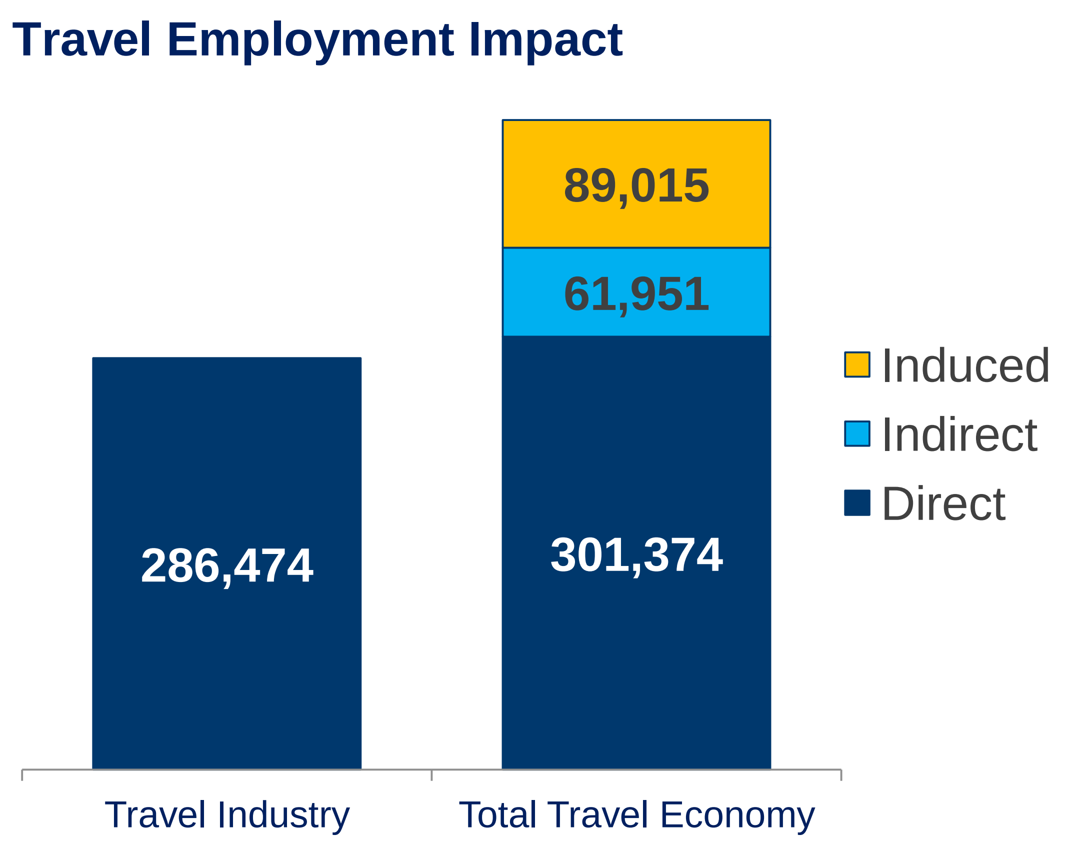
- Pennsylvania's travel and tourism industry directly generated $13.4 billion in the state's gross domestic product (GDP) in 2010.
- The state's entire travel and tourism economy (including direct, indirect and induced impacts) generated $27.3 billion in GDP in 2010, or 4.8% of the state's economy.



TOURISM ECONOMICS

Travel and tourism employment impact summary

- Traveler spending directly supported 286,474 jobs in Pennsylvania in 2010.
- The travel economy, including direct, indirect and induced impacts, supported 452,340 jobs. This is 6.34% of all jobs in the state.



State Travel and Tourism <u>Industry</u> Impacts

(Direct)

TOURISM ECONOMICS

AN OXFORD ECONOMICS COMPANY

Travel and tourism industry spending impacts

2010 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	$1,047.9	9,300
Non-Air Transportation	$1,787.5	23,714
Retail Trade	$1,316.5	33,809
Gasoline Stations	$501.3	7,888
Communications	--	--
Fire, Insurance, and Real Estate (FIRE)	$936.7	3,994
Business Services	--	--
Education and Health Care	--	--
Recreation and Entertainment	$1,934.5	42,124
Lodging	$2,576.8	48,949
Food & Beverage	$3,030.3	109,483
Personal Services	$299.8	7,214
Government	--	--
Total	$13,431.3	286,474

- Travel and tourism GDP is the value added of those sectors directly interacting with travelers.
- The narrow definition of the industry counts only travel consumption, which excludes capital investment and general government support of travel. This definition is consistent with US economic accounts.
- On this basis, PA's travel industry GDP was $13.4 billion in 2010, or 2.25% of the state total.

Travel and tourism industry spending impacts

2010 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	$1,047.9	9,300
Non-Air Transportation	$1,787.5	23,714
Retail Trade	$1,316.5	33,809
Gasoline Stations	$501.3	7,888
Communications	--	--
Fire, Insurance, and Real Estate (FIRE)	$936.7	3,994
Business Services	--	--
Education and Health Care	--	--
Recreation and Entertainment	$1,934.5	42,124
Lodging	$2,576.8	48,949
Food & Beverage	$3,030.3	109,483
Personal Services	$299.8	7,214
Government	--	--
Total	$13,431.3	286,474

- Traveler spending supported 286,474 jobs, or 4.0% of all employment within Pennsylvania.
- The food & beverage sector is a major beneficiary of traveler spending, which supported close to 109,500 jobs in this sector and contributed more than $3.0 billion of the $13.4 billion in travel industry GDP.
- Lodging is the second largest spending category in terms of employment and GDP impact.
- Recreation, non-air transportation and retail trade each individually added more than $1 billion to PA's state GDP.

Why spending and GDP differ

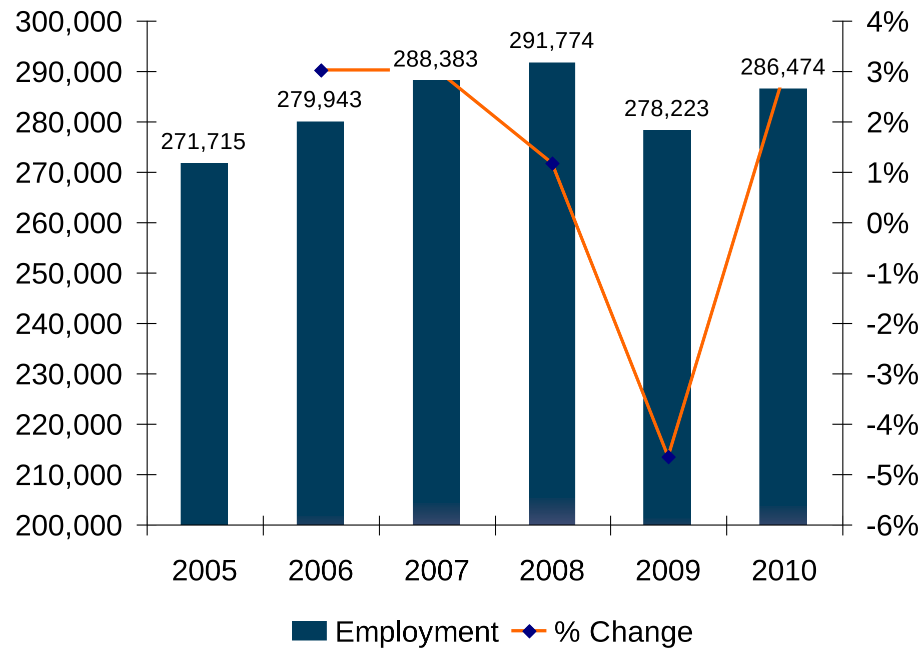
- Traveler spending in Pennsylvania equals $34.2 billion yet the industry's contribution to the state's Gross Domestic Product only measures $13.4 billion. Why are the figures so different?
- GDP (gross domestic product) is less than spending because GDP measures only the locally produced value of goods 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 (gasoline, food or retail goods) 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 lags in recovery

Tourism Employment						
	2005	2006	2007	2008	2009	2010
Employment	271,715	279,943	288,383	291,774	278,223	286,474
% Change		3.0%	3.0%	1.2%	-4.6%	3.0%

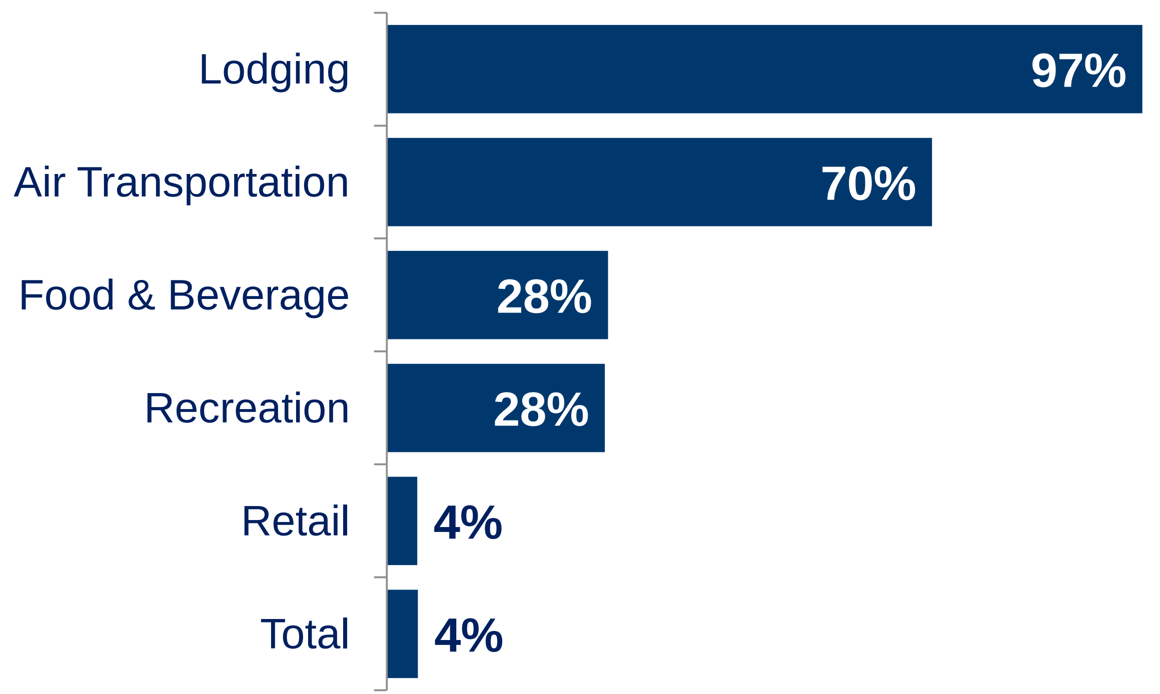
- Travel-related employment grew by 3.0% in 2010 – outpacing the growth in PA's total.
- The travel-related employment growth rate was well below the 9.2% increase in traveler spending.



Travel industry employment shares

- Travel 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 jobs reported for industries with official NAICS codes (e.g., accommodations, food & beverage, retail trade, transportation, etc.). Travel and tourism ranked as PA's 10th largest employer in 2010 with direct travel-related employment of 286,474 jobs.

Tourism Employment

Rank	Industry	2010
1	Health care and social assistance	994,574
2	Retail trade	764,889
3	Manufacturing	589,342
4	Professional, scientific, and technical services	458,314
5	Accommodation and food services	445,077
6	Finance and insurance	397,060
7	Other services, except public administration	387,550
8	Administrative and waste management services	356,553
9	Construction	354,542
10	Educational services	270,838
11	Transportation and warehousing	254,607
12	Real estate and rental and leasing	248,654

Tourism-generated employment: 286,474

State Travel and Tourism Economy Impacts

(direct, indirect, and induced)

TOURISM ECONOMICS

AN OXFORD ECONOMICS COMPANY

Travel economy GDP – total impact by industry

- Pennsylvania's travel and tourism industry generated more than $27 billion in total impact to the state's Gross Domestic Product (GDP) in 2010.
- The following table shows the direct, indirect, and induced impact of travel and tourism on the GDP for the diverse industry sectors.

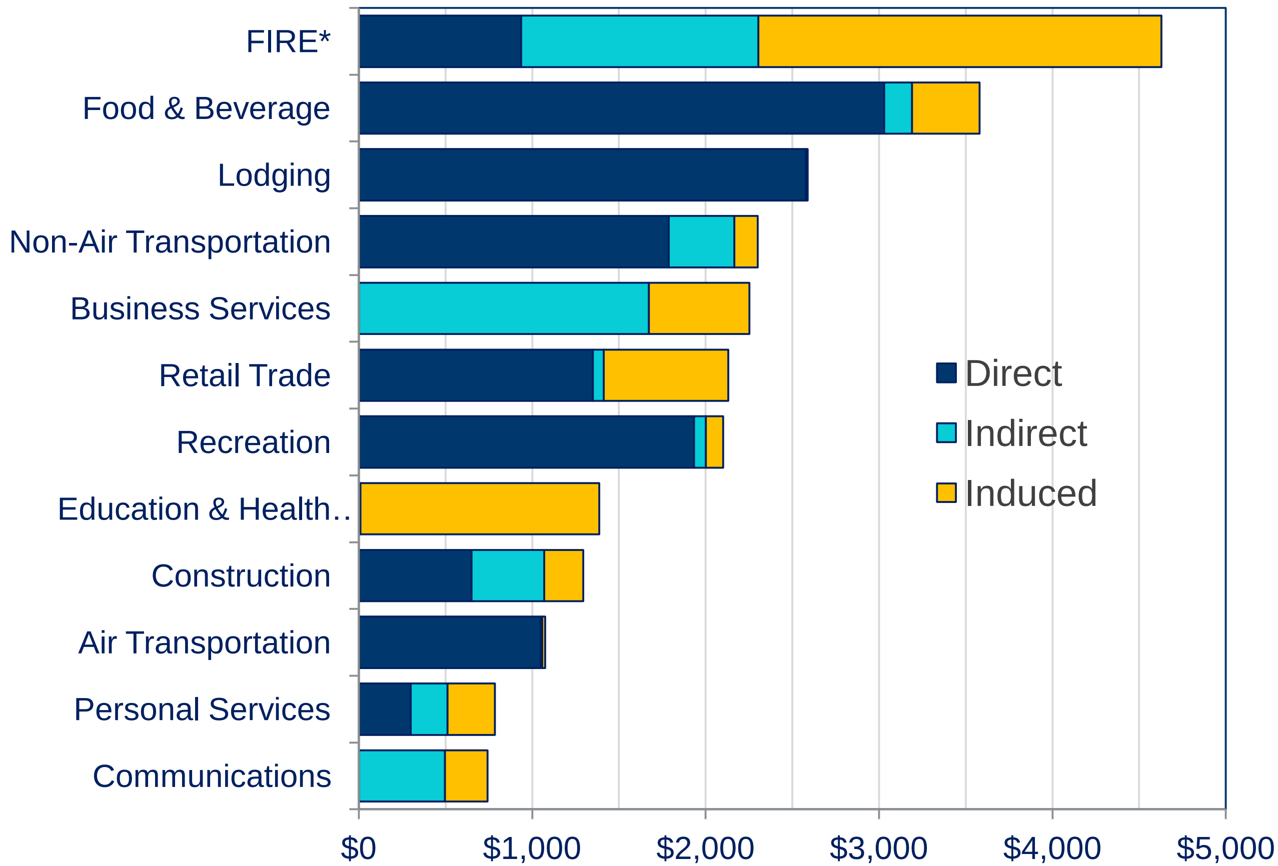
2010 PA Travel Industry GDP (*Value Added)*
(dollar amounts in millions)

Industry	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	--	$69	$30	$100
Construction and Utilities	$650	419	226	1,294
Manufacturing	17	279	200	496
Wholesale Trade	--	336	376	712
Air Transportation	1,048	10	17	1,075
Non-Air Transportation	1,788	378	134	2,300
Retail Trade	1,350	63	717	2,131
Gasoline Stations	501	6	54	561
Communications	--	496	247	743
Fire, Insurance, and Real Estate (FIRE)	937	1,368	2,323	4,628
Business Services	--	1,672	581	2,252
Education and Health Care	--	9	1,377	1,386
Recreation and Entertainment	1,934	68	100	2,102
Lodging	2,577	5	6	2,587
Food & Beverage	3,030	161	388	3,579
Personal Services	300	211	274	784
Government	252	200	91	543
Total	$14,383	$5,750	$7,140	$27,273
Percent Change from 2009	6.5%	4.5%	5.6%	5.8%

Travel economy GDP – impacts by industry

- Including supply chain and income effects, travel and tourism benefits a broad spectrum of industries.
- Almost $2.0 billion of the finance, insurance, and real estate (FIRE) industry's GDP in 2010 was generated by travel and tourism activity.

Total Travel GDP Impact by Industry
in millions of US dollars



* FIRE – Finance, Insurance, and Real Estate

Travel economy employment – total impact

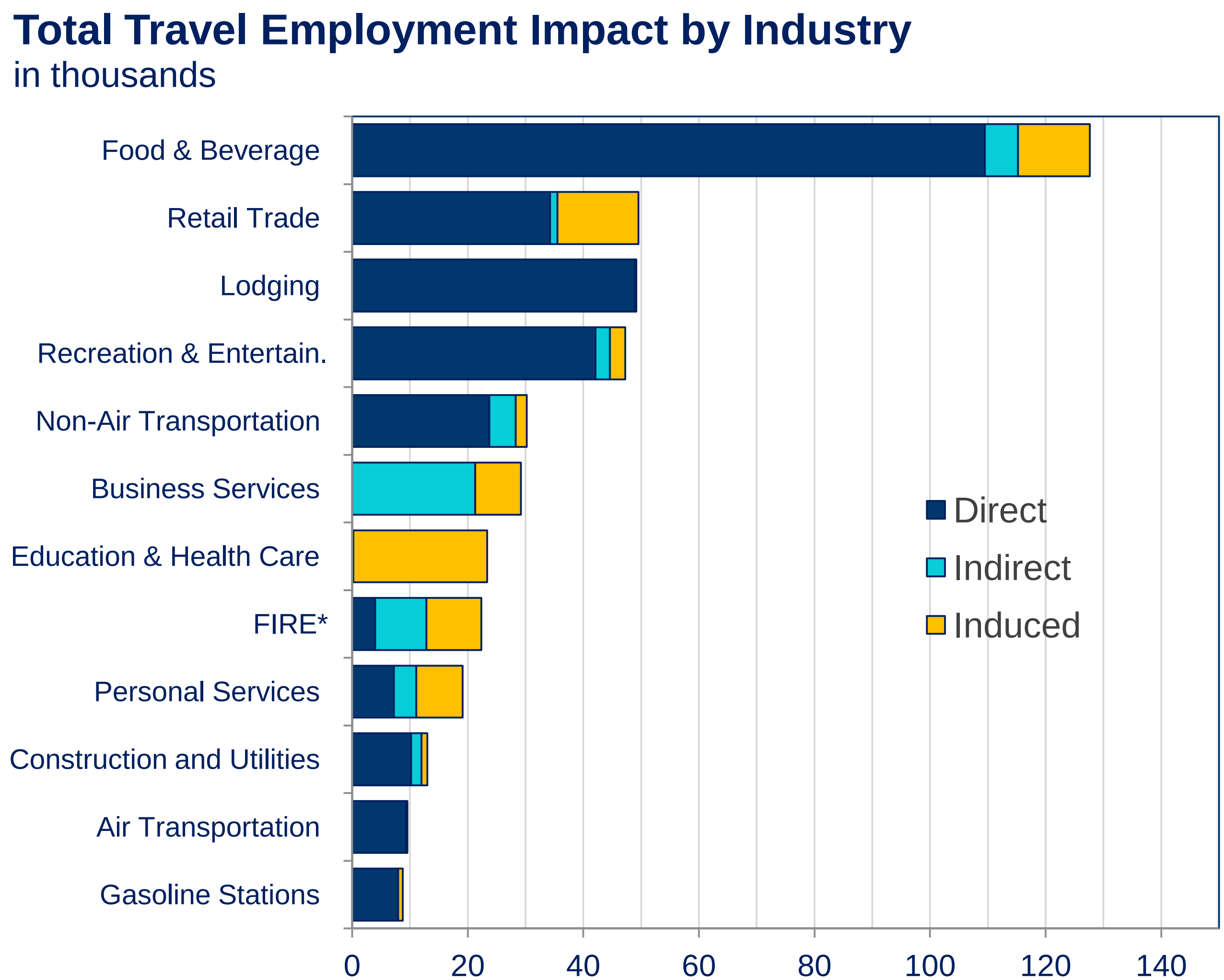
- Pennsylvania's travel and tourism industry supported 452,340 jobs in total, a number equivalent to 6.34% of all employment in Pennsylvania in 2010. The total is for the broadest measurement, i.e., includes businesses directly serving the traveling public and their support industries, as well as jobs supported by government spending, capital investment, and private consumption expenditures.

2010 PA Travel-Related Employment (*Value Added)*

Industry	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	--	717	577	1,295
Construction and Utilities	10,181	1,817	1,021	13,018
Manufacturing	246	2,651	1,409	4,306
Wholesale Trade	--	2,389	2,714	5,102
Air Transportation	9,300	87	149	9,536
Non-Air Transportation	23,714	4,610	1,865	30,189
Retail Trade	34,237	1,264	14,050	49,551
Gasoline Stations	7,888	89	812	8,790
Communications	--	3,108	1,473	4,581
Fire, Insurance, and Real Estate (FIRE)	3,994	8,844	9,521	22,359
Business Services	--	21,306	7,885	29,151
Education and Health Care	--	227	23,121	23,349
Recreation and Entertainment	42,124	2,473	2,684	47,280
Lodging	48,949	93	108	49,150
Food & Beverage	109,483	5,721	12,421	127,624
Personal Services	7,214	3,877	8,037	19,128
Government	4,046	2,678	1,166	7,891
Total	301,374	61,951	89,015	452,340
Percent Change from 2009	1.7%	0.2%	0.7%	1.3%

Travel economy employment – impacts by industry

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



* FIRE – Finance, Insurance, and Real Estate

Travel economy labor income – total impact

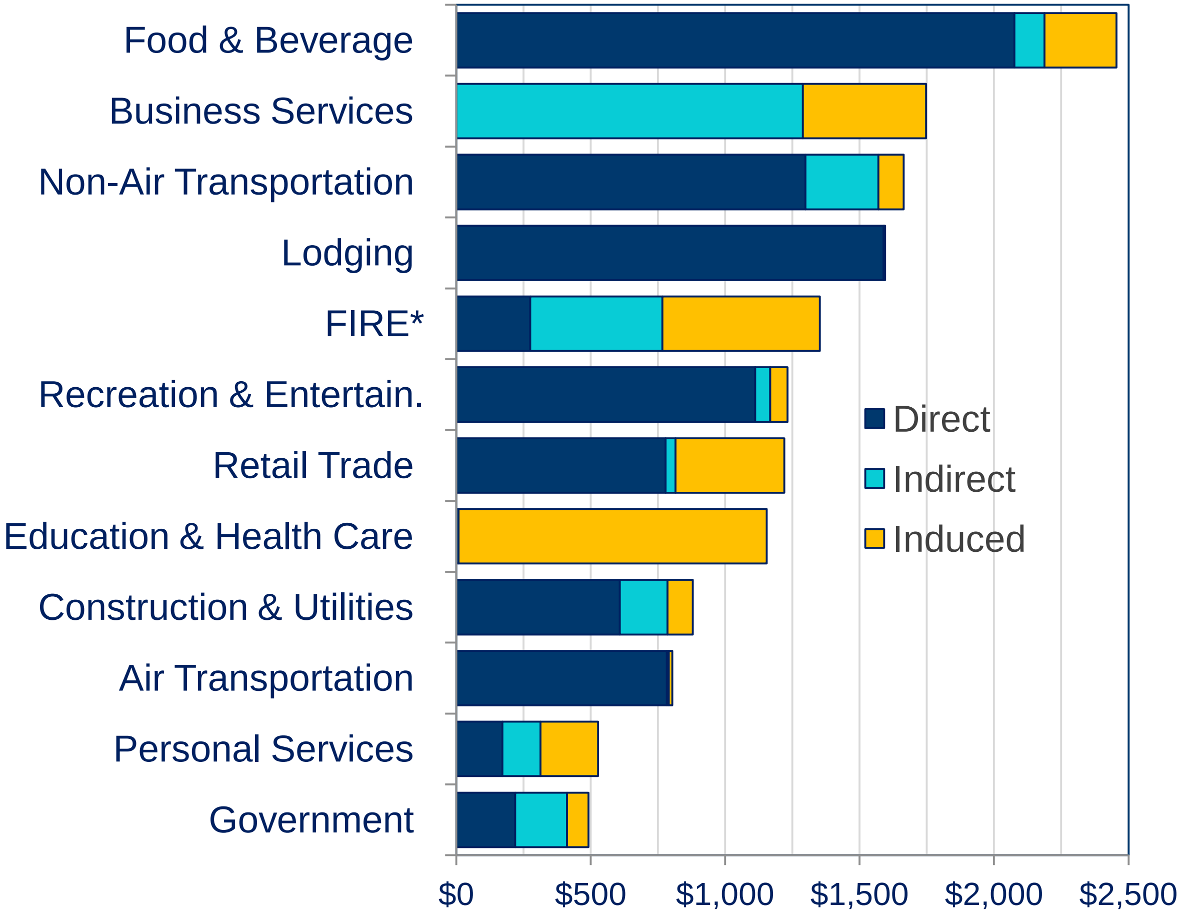
Traveler spending generated $16.5 billion in income for persons who were employed by businesses supported by travel and tourism in 2010.

2010 PA Travel-Related Labor Income (in millions of US dollars)				
Industry	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	$--	$29	$15	$45
Construction and Utilities	608	178	94	880
Manufacturing	14	174	100	288
Wholesale Trade	--	188	215	403
Air Transportation	783	7	13	804
Non-Air Transportation	1,299	271	94	1,664
Retail Trade	778	37	405	1,220
Gasoline Stations	219	3	24	245
Communications	--	316	129	445
Fire, Insurance, and Real Estate (FIRE)	275	492	585	1,353
Business Services	--	1,289	458	1,746
Education and Health Care	--	8	1,147	1,155
Recreation and Entertainment	1,112	56	64	1,232
Lodging	1,589	3	3	1,595
Food & Beverage	2,076	112	267	2,455
Personal Services	171	142	214	527
Government	219	193	79	491
Total	$9,143	$3,498	$3,907	$16,548
Percent Change from 2009	6.4%	2.8%	3.1%	4.8%

Travel economy labor income – impact by industry

- Traveler spending generated $16.5 billion in labor income in 2010, with the direct impact led by traveler intensive industries, i.e., restaurants, lodging, and transportation.
- Employees of business services and finance, insurance & real estate (FIRE) companies benefited substantially as suppliers to PA's travel and tourism industry.

Total Labor Income Impact by Industry
in millions of US dollars



* FIRE – Finance, Insurance, and Real Estate

Tax generation

Traveler Generated Taxes (in millions of US dollars)			
Tax Type	**2009**	**2010**	**% Change**
Federal Taxes	**$3,505.1**	**$3,681.6**	**5.0%**
Corporate	$ 349.2	$ 369.5	5.8%
Indirect Business	$ 332.3	$ 351.6	5.8%
Personal Income	$1,035.3	$1,085.5	4.8%
Social Security	$1,788.3	$1,875.0	4.8%
State and Local Taxes	**$3,378.1**	**$3,572.6**	**5.8%**
Corporate	$ 214.7	$ 235.9	9.9%
Personal Income	$ 325.1	$ 340.8	4.8%
Sales	$1,199.7	$1,316.7	9.8%
Hotel Occupancy	$ 111.8	$ 121.7	8.8%
Property	$1,030.2	$1,032.3	0.2%
Excise and Fees	$ 468.3	$ 495.6	5.8%
State Unemployment	$ 28.3	$ 29.6	4.8%
TOTAL	**$6,883.2**	**$7,254.3**	**5.4%**

- Travelers were responsible for nearly $3.6 billion in state and local tax revenues and an additional $3.7 billion in federal taxes in 2010.
- Pennsylvania's state and local governments would have to tax each PA household an additional $725 per year to continue to provide the current level of services now paid from the taxes generated by travel and tourism.

Pennsylvania’s Tourism Regions

Economic Impact of Travel

By Region and County

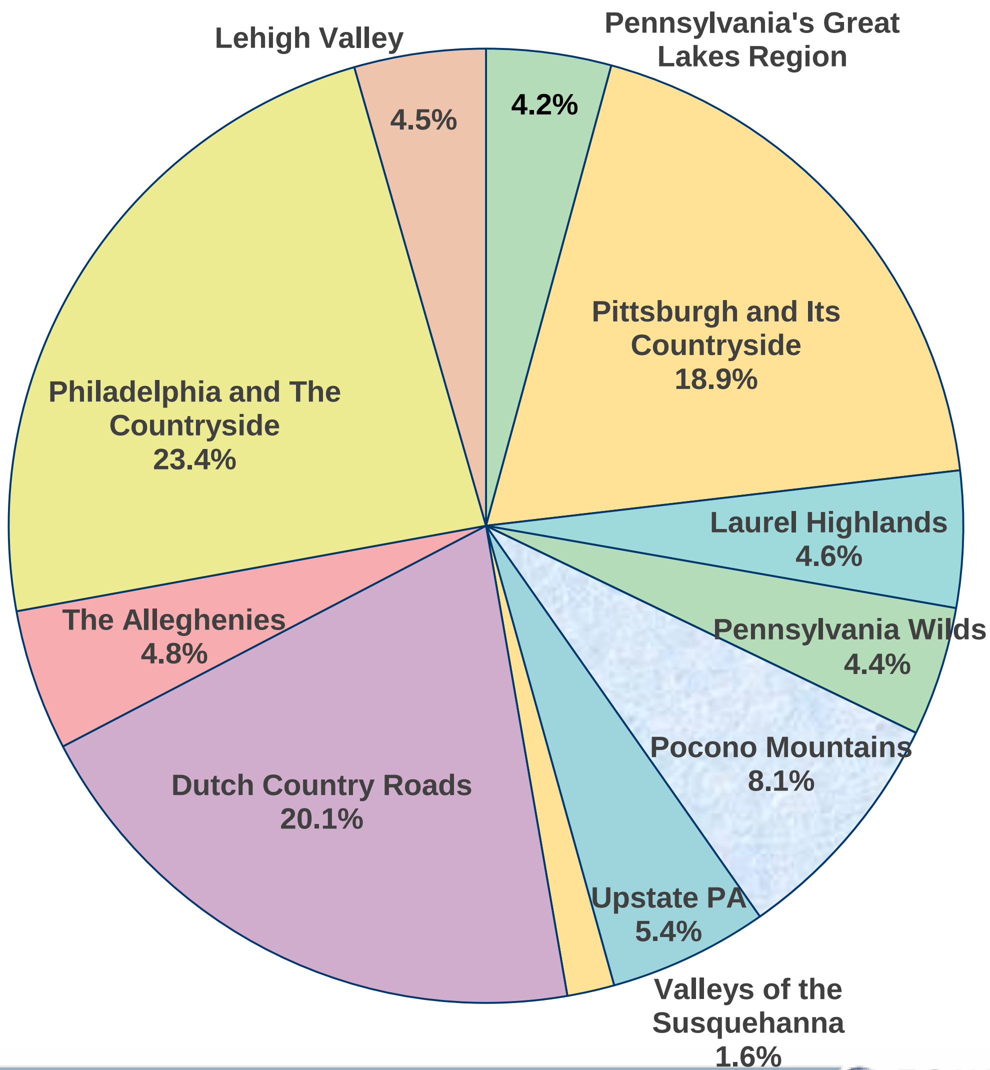
TOURISM ECONOMICS

AN OXFORD ECONOMICS COMPANY

Pennsylvania Regions

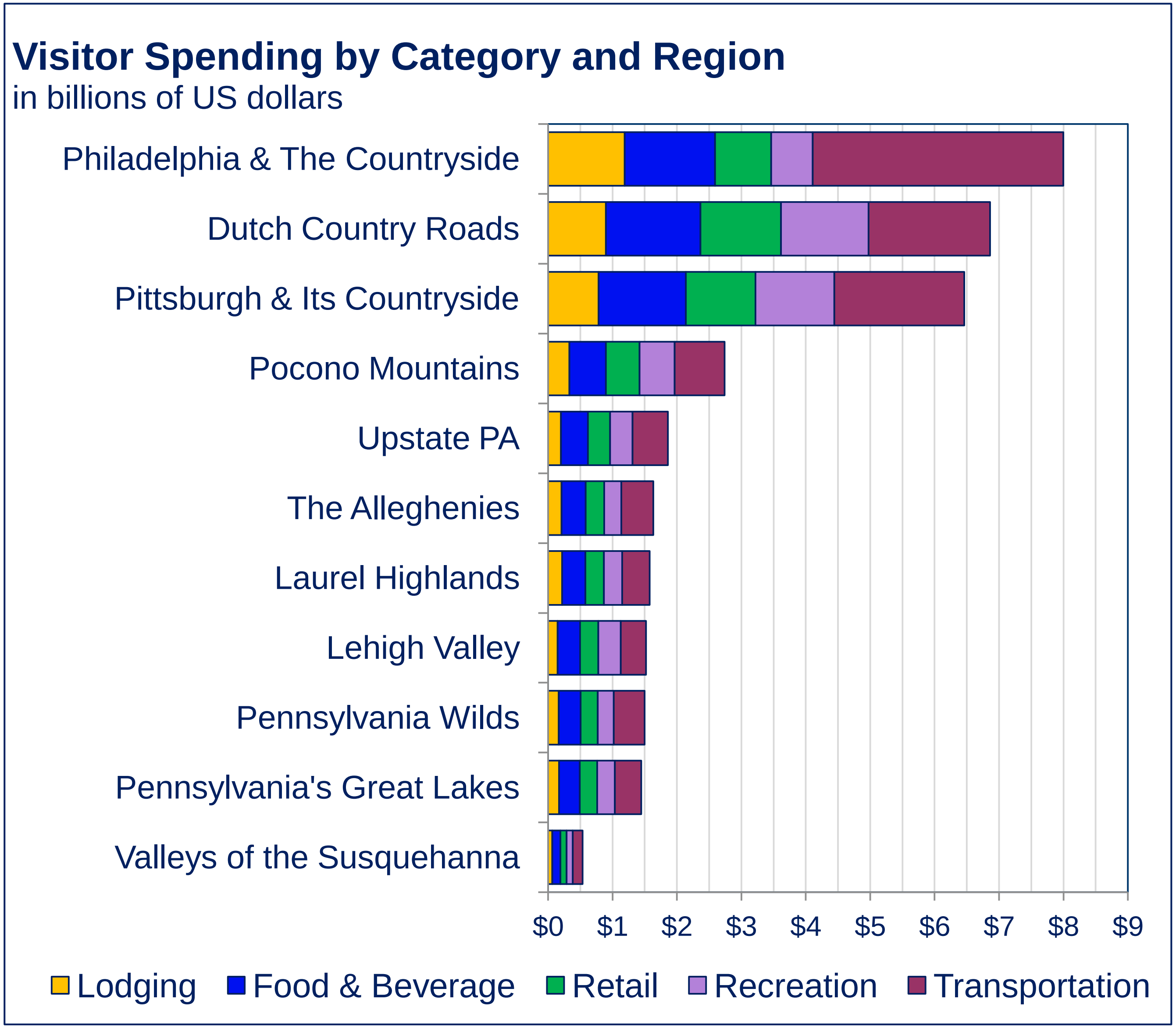
Regional Spending Shares

Share of Total Visitor Spending by Region



Regional spending by category

- Airports increased the transportation spending in both the Philadelphia and Pittsburgh regions.
- Travelers to the Dutch Country Roads and Pittsburgh regions spent far more on recreation than travelers to other regions.

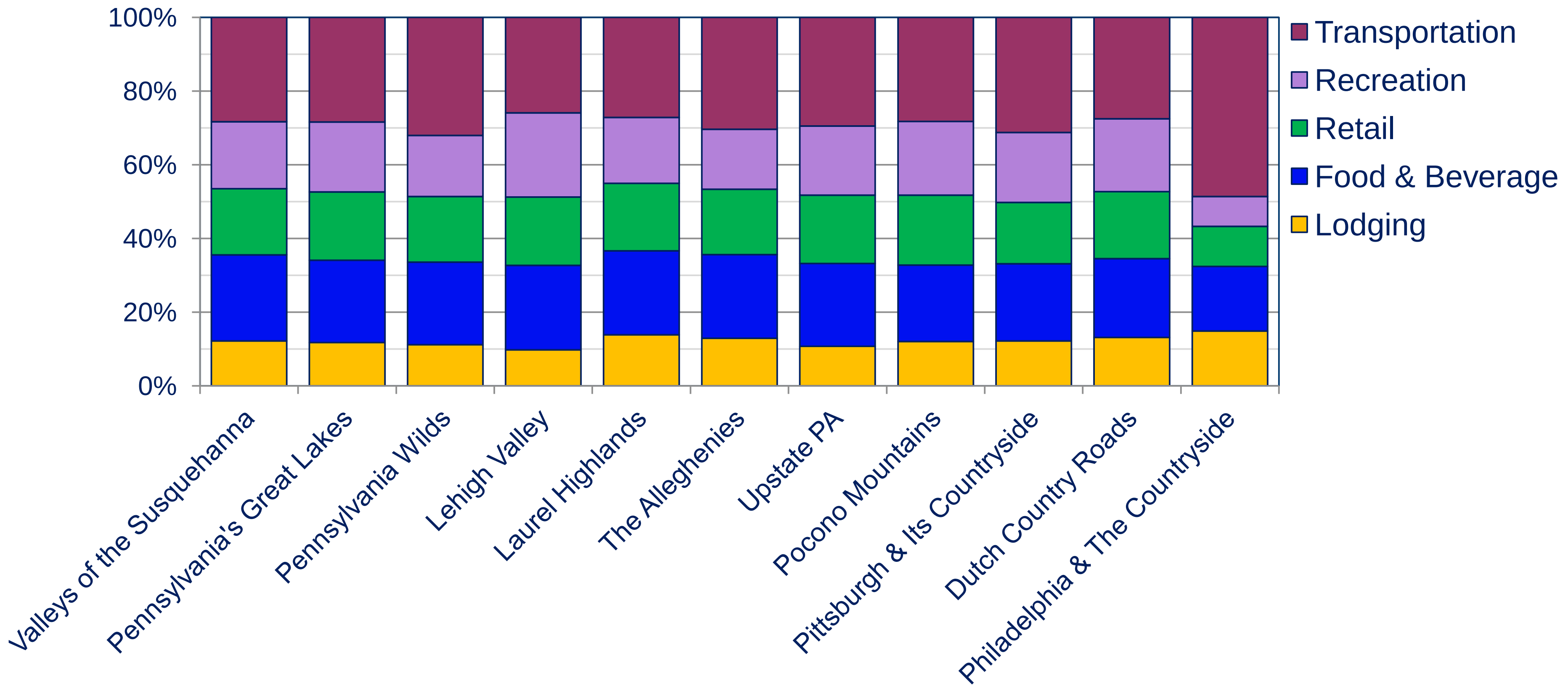


Regional spending by category -- % of total

- Spending on recreation is strong in Lehigh Valley and Pocono Mountains regions.
- Philadelphia and Laurel Highlands regions have the highest lodging shares.

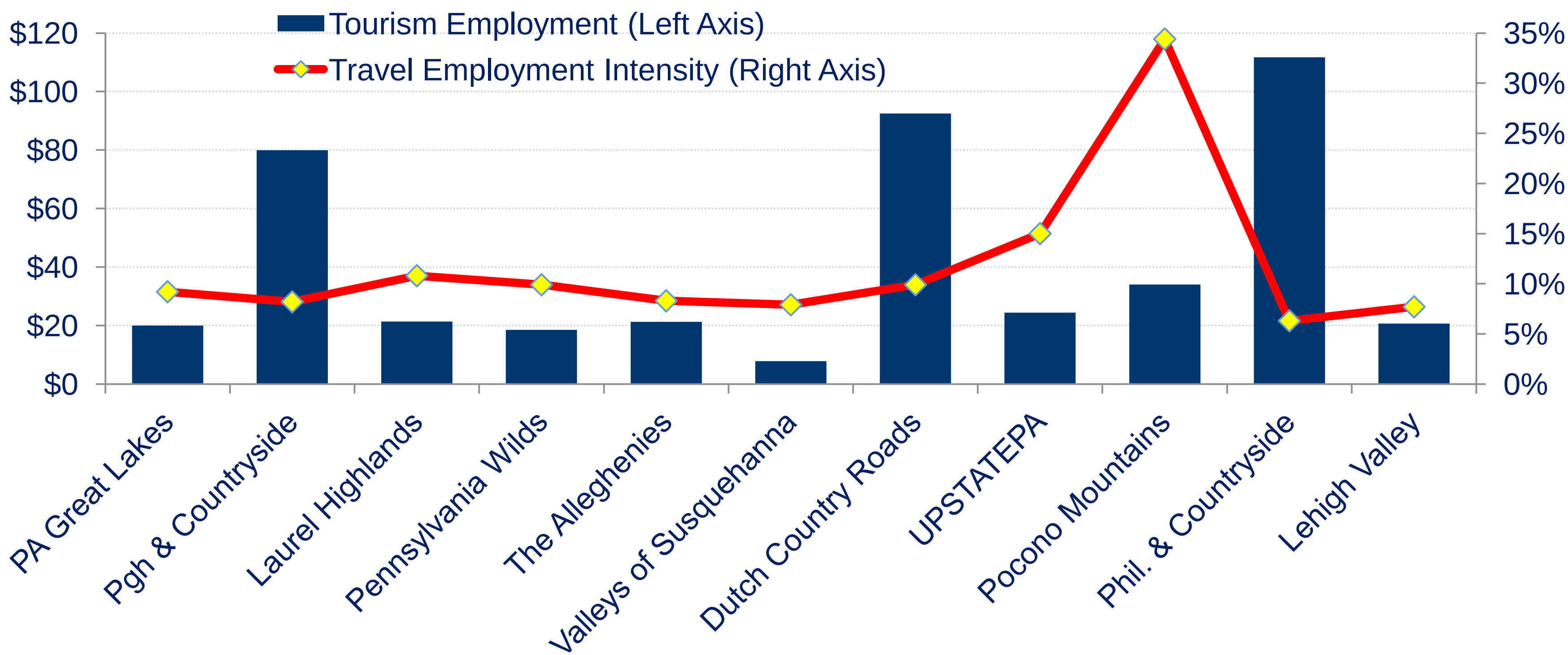
Visitor Spending by Category and Region

Percent of Total



Travel employment and intensity by region

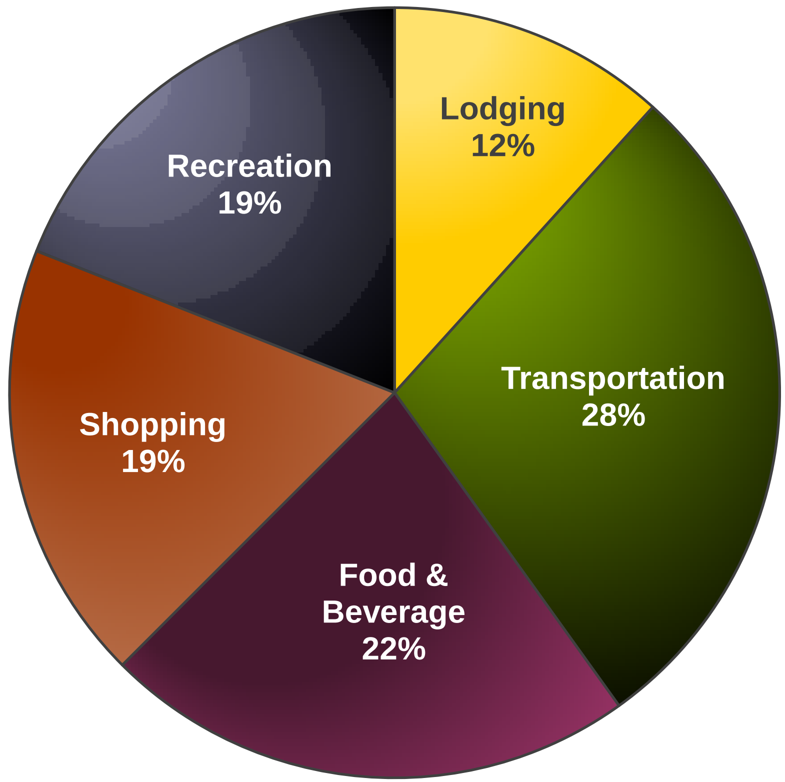
- Travel Employment Intensity is the measure of each county's dependence on the travel industry for jobs.
- The Pocono Mountains region is the most travel dependent of all the regions.
- The Philadelphia region has the most travel-related employment, but with the region's highly diverse economic base the region is the least dependent on travel.



Pennsylvania's Great Lakes Region

- Pennsylvania's Great Lakes region is comprised of Crawford, Erie, Mercer and Venango counties.
- Visitors spent $1.5 Billion in the region in 2010.
- The region's share of tourism dollars spent on shopping ranks 4th among the eleven regions of the state.

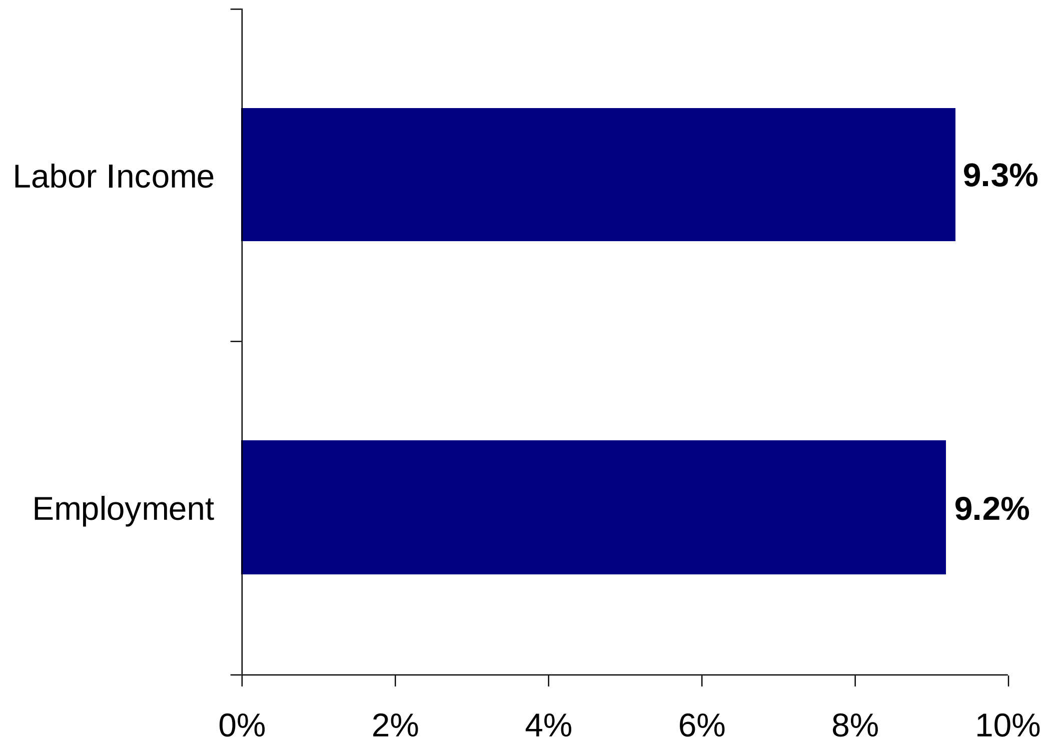
Pennsylvania's Great Lakes Region Spending by Category



Pennsylvania's Great Lakes Region

- Spending grew 11% in 2010, faster than the state average.
- The chart shows the tourism economy (including indirect and induced impacts) share of the total region economy.
- Travel-supported employment comprised 9.2% of the total regional economy.

Tourism Share of Regional Economy



Pennsylvania's Great Lakes Region - Timeline

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

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

Pennsylvania's Great Lakes Region - Direct Sales

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2010						
Crawford	16.9	57.7	47.3	40.9	78.7	241.5
Erie	106.7	180.7	145.0	173.5	223.5	829.4
Mercer	34.1	60.5	54.5	43.8	63.1	256.0
Venango	11.9	24.1	20.6	16.6	45.0	118.3
Great Lakes	169.6	323.1	267.4	274.8	410.4	1,445.2
Percent Change	11.7%	8.0%	10.1%	17.0%	9.8%	10.9%
2009						
Crawford	14.6	53.5	44.1	36.4	71.1	219.7
Erie	95.1	166.6	129.1	145.2	205.1	741.2
Mercer	31.0	56.3	50.6	38.8	56.5	233.2
Venango	11.1	22.7	19.3	14.6	41.1	108.7
Great Lakes	151.8	299.1	243.0	235.0	373.9	1,302.7

Pennsylvania's Great Lakes Region - TSA Spending

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2010				
Crawford	241.5	1.1	11.1	253.7
Erie	829.4	5.9	38.3	873.6
Mercer	256.0	1.5	11.8	269.3
Venango	118.3	0.6	5.5	124.3
Great Lakes	1,445.2	9.0	66.7	1,520.9
Percent Change	10.9%	2.0%	1.2%	10.4%
2009				
Crawford	219.7	1.1	11.1	231.9
Erie	741.2	5.6	37.5	784.3
Mercer	233.2	1.5	11.8	246.4
Venango	108.7	0.6	5.5	114.8
Great Lakes	1,302.7	8.8	65.9	1,377.5

Pennsylvania's Great Lakes Region - Industry Impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State &	Federal
2010					
Crawford	241.5	2,160	46.0	12.6	11.1
Erie	829.4	7,004	163.7	46.0	39.1
Mercer	256.0	2,417	47.8	13.6	11.7
Venango	118.3	1,138	26.7	6.6	6.0
Great Lakes	1,445.2	12,719	284.2	78.8	68.0
Percent Change	10.9%	4.1%	10.6%	6.4%	5.1%
2009					
Crawford	219.7	2,091	43.1	11.9	10.6
Erie	741.2	6,674	146.1	43.2	37.2
Mercer	233.2	2,343	43.0	12.8	11.1
Venango	108.7	1,113	24.7	6.3	5.8
Great Lakes	1,302.7	12,221	256.9	74.1	64.7

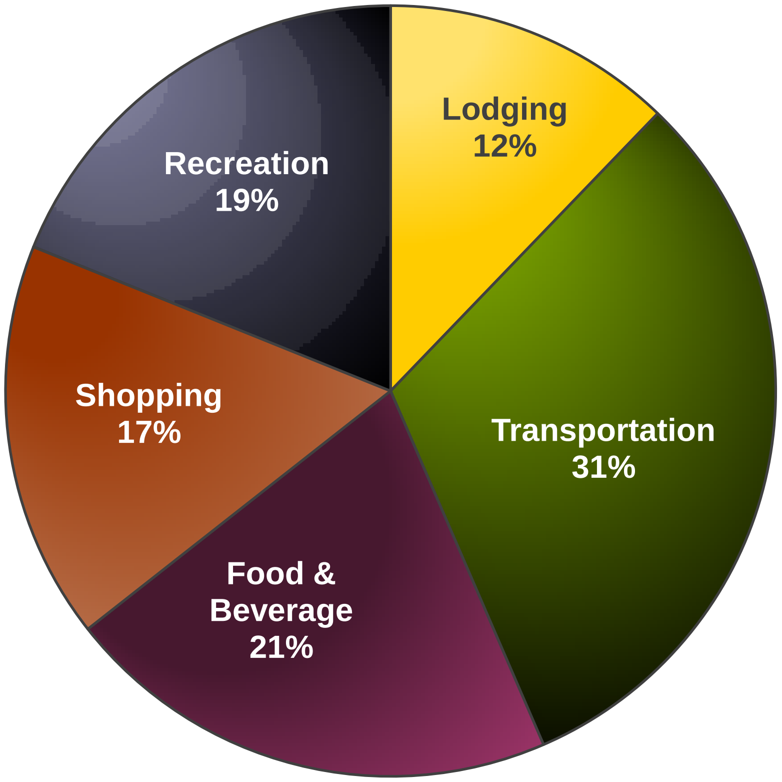
Pennsylvania's Great Lakes Region - Economy Impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2010					
Crawford	253.7	3,419	100.0	22.3	22.4
Erie	873.6	10,893	338.2	79.9	78.7
Mercer	269.3	3,827	106.3	23.8	23.5
Venango	124.3	1,819	57.3	11.8	12.2
Great Lakes	1,520.9	19,957	601.8	137.8	136.8
Percent Change	10.4%	3.2%	7.5%	6.2%	5.1%
2009					
Crawford	231.9	3,333	95.6	21.0	21.3
Erie	784.3	10,478	311.4	75.2	74.9
Mercer	246.4	3,733	98.9	22.4	22.4
Venango	114.8	1,787	54.1	11.1	11.6
Great Lakes	1,377.5	19,332	560.0	129.7	130.2

Pittsburgh and Its Countryside

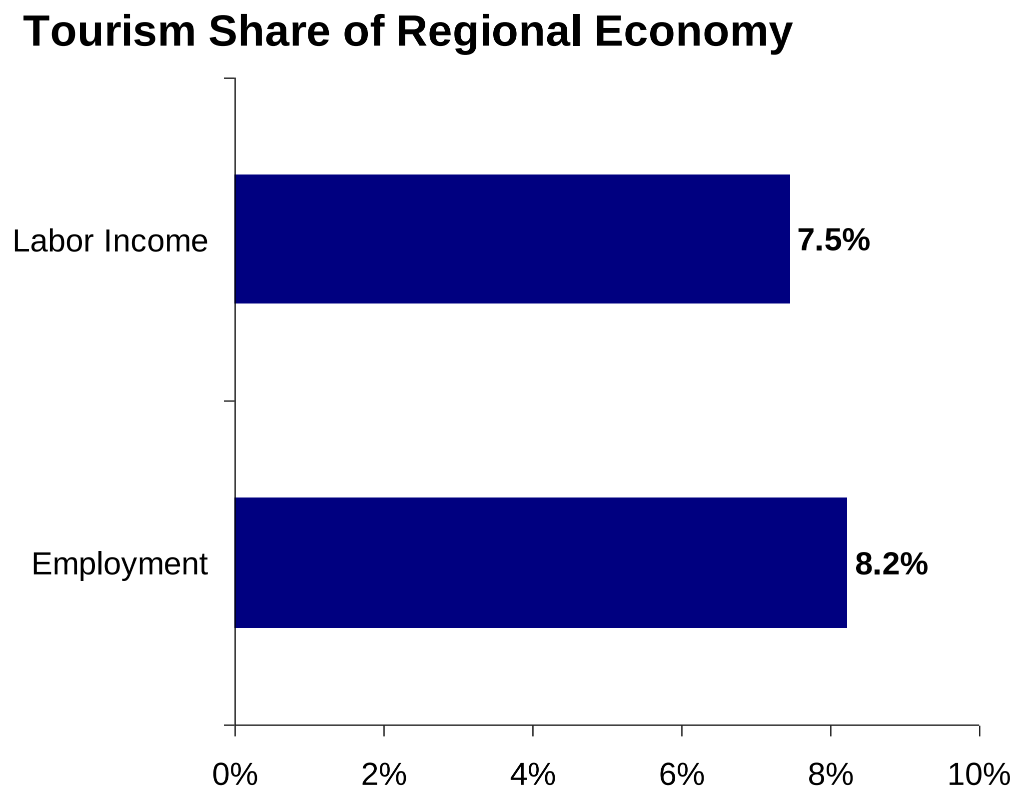
- Pittsburgh & Its Countryside region is comprised of the following eight counties: Allegheny, Armstrong, Beaver, Butler, Greene, Indiana, Lawrence, and Washington.
- Travelers spent $6.5 billion in the region in 2010.
- The region had the third highest traveler spending, behind Philadelphia and The Countryside and Dutch Country Roads regions.

Pittsburgh and Its Countryside Region Spending by Category



Pittsburgh & Its Countryside

- Traveler spending grew 11.7% in the region.
- Spending grew over 20% in Washington County.
- The chart shows the travel economy (including indirect and induced impacts) share of the total region economy.
- Travel-supported employment comprised 8.2% of the total regional economy.



Pittsburgh & Its Countryside – Timeline

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

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

Pittsburgh & Its Countryside – Tourism Direct Sales

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2010						
Allegheny	611.1	993.0	793.2	894.1	1,536.9	4,828.1
Armstrong	2.4	14.9	11.9	16.1	26.0	71.3
Beaver	16.1	48.2	38.1	36.3	78.6	217.2
Butler	53.0	97.3	81.4	72.2	136.7	440.6
Greene	8.8	16.5	12.2	11.1	20.2	68.9
Indiana	19.8	36.9	28.3	26.8	42.3	154.2
Lawrence	5.7	24.2	20.4	19.0	29.2	98.6
Washington	68.3	122.1	94.2	147.6	150.6	582.7
Pittsburgh and Its Countryside	785.1	1,353.0	1,079.7	1,223.3	2,020.5	6,461.7
Percent Change	12.7%	8.9%	9.8%	18.2%	10.6%	11.7%
2009						
Allegheny	547.6	914.6	727.6	760.8	1,404.0	4,354.6
Armstrong	2.2	13.8	9.8	9.2	23.6	58.6
Beaver	14.9	45.3	36.3	32.3	67.1	196.0
Butler	46.7	89.3	76.8	63.4	129.8	406.1
Greene	7.0	14.5	10.6	9.1	17.5	58.7
Indiana	19.0	35.4	26.6	24.8	38.8	144.5
Lawrence	4.5	22.2	14.5	16.8	25.7	83.7
Washington	54.6	106.9	80.9	119.0	120.9	482.3
Pittsburgh and Its Countryside	696.5	1,242.1	983.3	1,035.3	1,827.4	5,784.5

Pittsburgh & Its Countryside – TSA Spending Categories

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2010				
Allegheny	4,828.1	41.6	222.8	5,092.6
Armstrong	71.3	0.3	3.3	74.9
Beaver	217.2	1.0	10.0	228.3
Butler	440.6	2.5	20.3	463.4
Greene	68.9	0.4	3.2	72.4
Indiana	154.2	0.9	7.1	162.2
Lawrence	98.6	0.4	4.6	103.6
Washington	582.7	3.2	26.9	612.8
Pittsburgh and Its Countryside	6,461.7	50.3	298.2	6,810.2
Percent Change	11.7%	2.5%	1.9%	11.2%
2009				
Allegheny	4,354.6	40.5	220.4	4,615.5
Armstrong	58.6	0.3	3.0	61.9
Beaver	196.0	1.0	9.9	207.0
Butler	406.1	2.5	20.6	429.2
Greene	58.7	0.4	3.0	62.1
Indiana	144.5	1.0	7.3	152.8
Lawrence	83.7	0.4	4.2	88.4
Washington	482.3	2.9	24.4	509.7
Pittsburgh and Its Countryside	5,784.5	49.0	292.8	6,126.4

Pittsburgh & Its Countryside – Industry Impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State &	Federal
2010					
Allegheny	4,828.1	37,302	1,193.9	299.4	261.4
Armstrong	71.3	554	11.4	3.5	3.0
Beaver	217.2	1,965	49.9	12.2	11.2
Butler	440.6	3,740	85.1	23.6	20.5
Greene	68.9	479	9.4	3.3	2.7
Indiana	154.2	1,351	28.2	8.1	6.9
Lawrence	98.6	873	18.8	5.1	4.6
Washington	582.7	5,570	140.3	33.9	31.0
Pittsburgh and Its Countryside	6,461.7	51,834	1,537.0	389.1	341.3
Percent Change	11.7%	3.9%	9.0%	6.0%	5.0%
2009					
Allegheny	4,354.6	36,188	1,104.0	282.6	248.8
Armstrong	58.6	484	9.7	3.3	2.8
Beaver	196.0	1,977	49.0	11.6	10.7
Butler	406.1	3,664	78.9	22.3	19.5
Greene	58.7	419	7.9	3.1	2.5
Indiana	144.5	1,347	26.9	7.7	6.6
Lawrence	83.7	806	16.4	4.8	4.3
Washington	482.3	5,026	117.7	32.0	29.5
Pittsburgh and Its Countryside	5,784.5	49,911	1,410.5	367.2	324.9

Pittsburgh & Its Countryside – Economy Impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2010					
Allegheny	5,092.6	56,237	2,214.1	516.6	527.0
Armstrong	74.9	1,104	34.9	6.2	6.0
Beaver	228.3	3,448	118.1	21.7	22.6
Butler	463.4	5,922	181.6	41.5	41.3
Greene	72.4	858	25.4	5.8	5.3
Indiana	162.2	2,250	66.5	14.2	14.0
Lawrence	103.6	1,621	51.2	9.1	9.2
Washington	612.8	8,523	278.2	59.8	62.5
Pittsburgh and Its Countryside	6,810.2	79,963	2,970.1	674.8	687.9
Percent Change	11.2%	3.1%	6.6%	5.9%	5.0%
2009					
Allegheny	4,615.5	54,859	2,086.9	488.1	501.7
Armstrong	61.9	1,014	32.1	5.8	5.7
Beaver	207.0	3,462	116.4	20.5	21.5
Butler	429.2	5,826	172.2	39.1	39.3
Greene	62.1	782	22.9	5.4	5.1
Indiana	152.8	2,245	64.4	13.4	13.3
Lawrence	88.4	1,534	47.1	8.6	8.7
Washington	509.7	7,837	244.2	56.5	59.5
Pittsburgh and Its Countryside	6,126.4	77,558	2,786.2	637.3	654.9

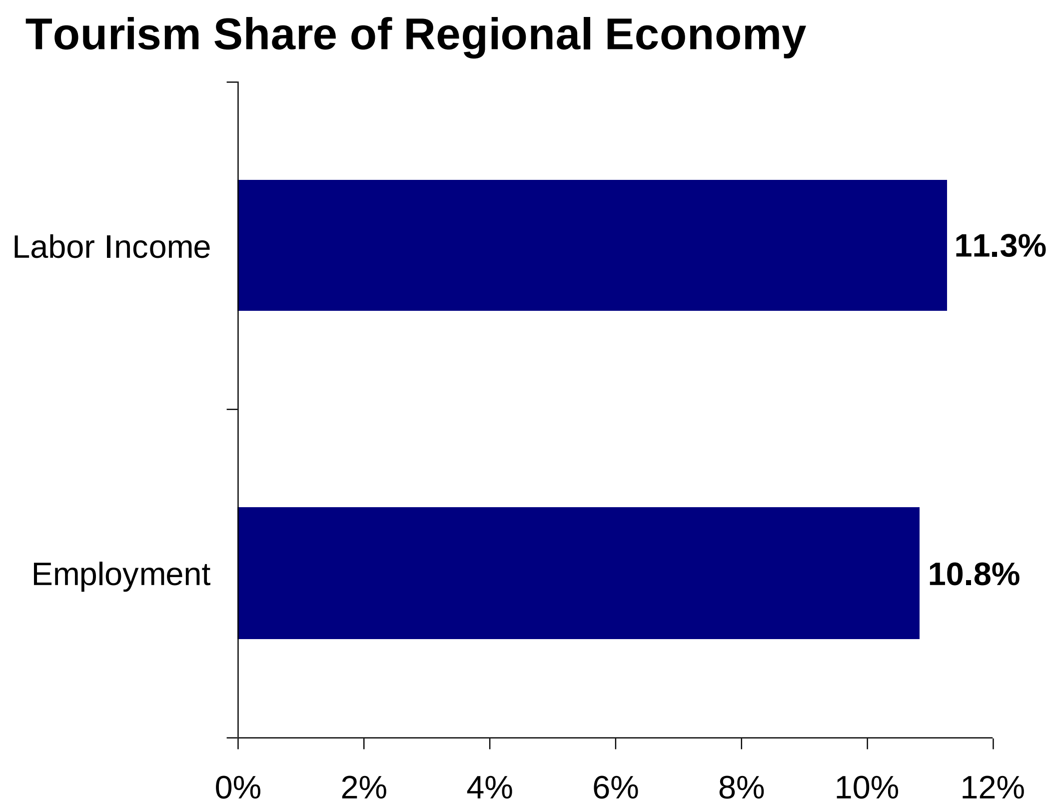
Laurel Highlands

- The Laurel Highlands, in southwestern PA is comprised of the following counties: Fayette, Somerset, and Westmorland.
- Travelers spent $1.6 billion in the Laurel Highlands in 2010.
- In the region, spending on recreational activities led growth, up 13.6% in 2010.

Laurel Highlands Region Spending by Category

Laurel Highlands

- Overall, the region grew 10% in 2011.
- The chart shows the travel economy (including indirect and induced impacts) share of the total region economy.
- Travel-supported employment comprised10.8% of the total regional economy.



Laurel Highlands – Timeline

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

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

Laurel Highlands – Travel Direct Sales

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2010						
Fayette	103.1	136.7	108.2	110.3	137.3	595.7
Somerset	49.0	76.6	56.0	54.3	94.2	330.1
Westmoreland	66.6	145.5	124.5	117.4	197.5	651.6
Laurel Highlands	218.8	358.9	288.7	282.0	428.9	1,577.3
Percent Change	9.5%	7.7%	7.6%	13.6%	12.0%	10.1%
2009						
Fayette	93.9	126.5	100.1	95.5	122.1	538.2
Somerset	45.6	72.7	53.0	48.7	86.9	306.9
Westmoreland	60.3	134.2	115.2	104.1	173.8	587.6
Laurel Highlands	199.7	333.3	268.4	248.3	382.9	1,432.6

Laurel Highlands – Tourism Satellite Account

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2010				
Fayette	595.7	3.0	27.5	626.1
Somerset	330.1	1.9	15.2	347.2
Westmoreland	651.6	3.3	30.1	684.9
Laurel Highlands	1,577.3	8.1	72.8	1,658.2
Percent Change	10.1%	7.4%	0.4%	9.6%
2009				
Fayette	538.2	2.3	27.2	567.7
Somerset	306.9	2.0	15.5	324.4
Westmoreland	587.6	3.3	29.7	620.7
Laurel Highlands	1,432.6	7.6	72.5	1,512.7

Laurel Highlands – Industry Impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State &	Federal
2010					
Fayette	595.7	5,219	124.7	32.5	29.1
Somerset	330.1	3,234	83.4	19.7	18.1
Westmoreland	651.6	5,369	114.3	33.4	28.7
Laurel Highlands	1,577.3	13,822	322.5	85.5	75.9
Percent Change	10.1%	2.1%	8.4%	7.0%	5.1%
2009					
Fayette	538.2	5,047	111.8	29.9	27.7
Somerset	306.9	3,255	80.1	18.6	17.3
Westmoreland	587.6	5,243	105.6	31.4	27.3
Laurel Highlands	1,432.6	13,544	297.5	80.0	72.2

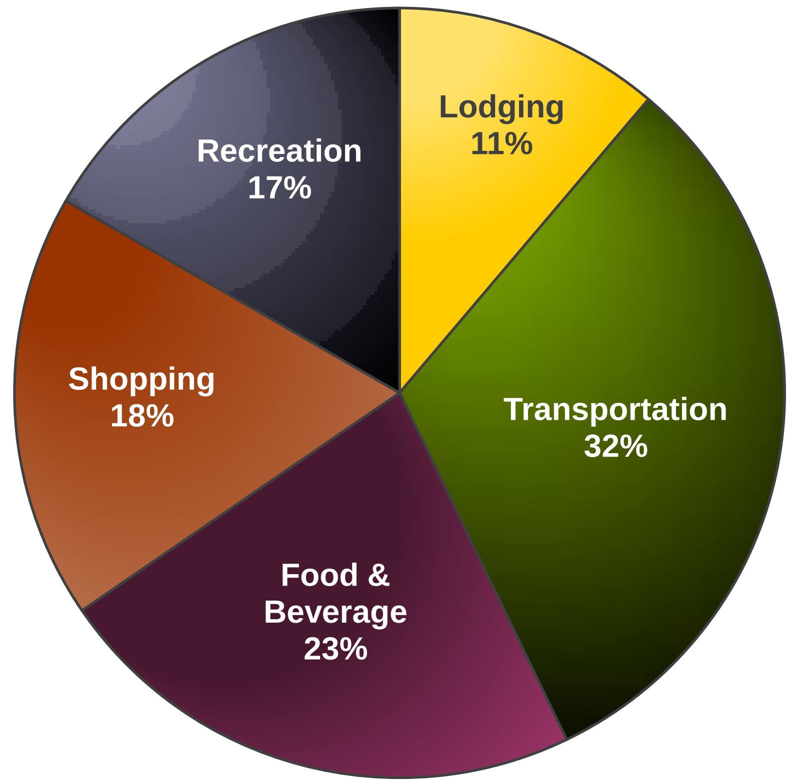
Laurel Highlands – Economy Impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2010					
Fayette	626.1	7,541	230.8	57.4	58.6
Somerset	347.2	4,724	154.6	34.7	36.5
Westmoreland	684.9	9,078	274.0	58.8	57.7
Laurel Highlands	1,658.2	21,343	659.5	150.9	152.8
Percent Change	9.6%	1.6%	6.0%	6.5%	5.1%
2009					
Fayette	567.7	7,329	212.0	53.4	55.7
Somerset	324.4	4,755	150.3	32.8	34.8
Westmoreland	620.7	8,916	259.9	55.4	54.9
Laurel Highlands	1,512.7	21,000	622.2	141.6	145.5

Pennsylvania Wilds

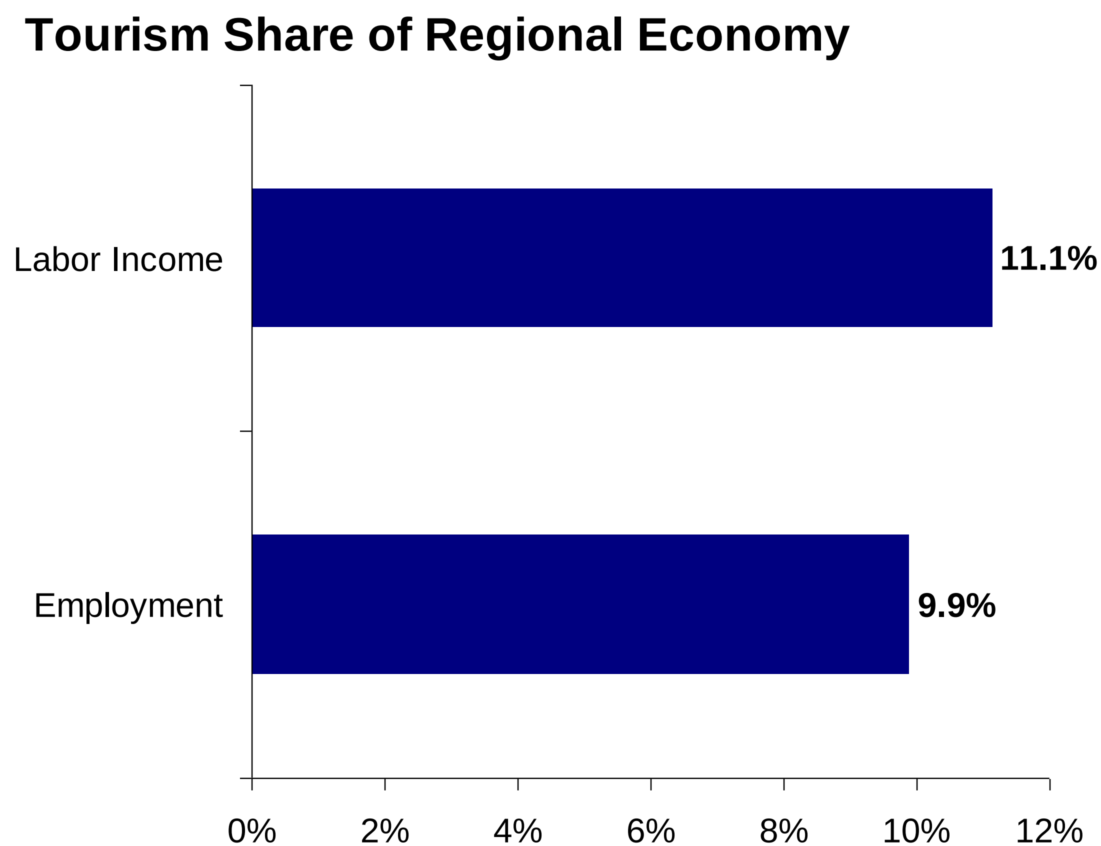
- The Pennsylvania Wilds region is comprised of the following counties: Cameron, Clarion, Clearfield, Clinton, Elk, Forest, Jefferson, Lycoming, McKean, Potter, Tioga, and Warren.
- Visitors spent $1.5 billion in the Pennsylvania Wilds region in 2010.

Pennsylvania Wilds Region Spending by Category



Pennsylvania Wilds

- The Pennsylvania Wilds region travel industry grew 18% in 2010, the fastest growth of any region in the state.
- The chart shows the travel economy (including indirect and induced impacts) share of the total region economy.
- With 9.9% of employment dependant on the travel industry, the travel industry is important to this region.



Pennsylvania Wilds – Traveler Spending Timeline

Tourism Industry Spending (Millions of dollars)						
County	2005	2006	2007	2008	2009	2010
Cameron	7.8	7.9	8.4	9.3	7.8	9.0
Clarion	90.1	94.3	101.7	112.0	93.5	108.1
Clearfield	222.6	227.5	233.5	250.3	212.3	248.9
Clinton	109.8	108.9	111.1	123.2	108.0	136.6
Elk	47.9	47.8	51.5	57.9	47.2	52.3
Forest	18.2	18.6	19.7	21.2	18.5	20.4
Jefferson	93.0	90.3	92.6	97.8	82.2	102.9
Lycoming	231.2	241.5	255.6	293.1	269.3	308.7
McKean	119.6	120.0	126.1	138.9	123.2	158.9
Potter	24.6	25.1	26.6	29.3	27.0	30.1
Tioga	144.1	139.5	149.1	159.1	139.5	171.2
Warren	121.5	127.9	137.0	157.8	137.7	149.3
Pennsylvania Wilds	1,230.4	1,249.3	1,312.9	1,450.1	1,266.2	1,496.4
Percent Change		1.5%	5.1%	10.4%	-12.7%	18.2%

Pennsylvania Wilds – Travel Industry Employment Timeline

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

Pennsylvania Wilds – 2010 Direct Sales

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2010						
Cameron	0.6	1.7	1.7	2.2	2.7	9.0
Clarion	14.4	25.6	21.0	17.6	29.6	108.1
Clearfield	28.0	56.1	46.3	42.4	76.2	248.9
Clinton	13.3	31.0	23.1	23.7	45.5	136.6
Elk	6.5	11.7	9.7	8.5	15.9	52.3
Forest	2.9	4.7	4.3	3.6	4.9	20.4
Jefferson	9.4	21.0	16.7	18.1	37.6	102.9
Lycoming	42.6	75.5	57.6	44.9	88.2	308.7
McKean	16.7	32.1	24.7	25.6	59.8	158.9
Potter	4.4	6.7	4.9	5.0	9.2	30.1
Tioga	20.3	38.0	31.2	29.8	51.9	171.2
Warren	7.4	32.1	25.1	26.8	57.9	149.3
Pennsylvania Wilds	166.5	336.1	266.2	248.2	479.4	1,496.4
Percent Change	29.3%	15.0%	11.7%	22.2%	18.8%	18.2%

Pennsylvania Wilds – 2009 Direct Sales

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2009						
Cameron	0.6	1.6	1.6	1.9	2.2	7.8
Clarion	11.7	22.7	18.5	14.5	26.1	93.5
Clearfield	23.3	48.8	42.0	34.7	63.5	212.3
Clinton	7.7	25.1	18.6	18.0	38.6	108.0
Elk	6.0	10.9	9.0	7.5	13.9	47.2
Forest	2.8	4.1	4.2	3.2	4.1	18.5
Jefferson	8.9	19.8	15.5	11.3	26.6	82.2
Lycoming	32.3	65.2	55.2	41.2	75.4	269.3
McKean	9.8	25.5	19.0	18.8	50.1	123.2
Potter	3.9	6.1	4.5	4.4	8.1	27.0
Tioga	14.3	32.3	26.7	23.8	42.3	139.5
Warren	7.4	30.4	23.6	23.8	52.5	137.7
Pennsylvania Wilds	128.7	292.3	238.4	203.2	403.5	1,266.2

Pennsylvania Wilds – 2010 TSA Spending

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2010				
Cameron	9.0	0.0	0.4	9.4
Clarion	108.1	0.6	5.0	113.8
Clearfield	248.9	1.3	11.5	261.7
Clinton	136.6	0.7	6.3	143.6
Elk	52.3	0.3	2.4	55.0
Forest	20.4	0.1	0.9	21.5
Jefferson	102.9	0.5	4.7	108.1
Lycoming	308.7	1.8	14.2	324.7
McKean	158.9	0.9	7.3	167.1
Potter	30.1	0.2	1.4	31.7
Tioga	171.2	1.0	7.9	180.1
Warren	149.3	0.6	6.9	156.9
Pennsylvania Wilds	1,496.4	8.0	69.1	1,573.5
Percent Change	18.2%	7.9%	7.8%	17.6%

Pennsylvania Wilds – 2009 TSA Spending

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2009				
Cameron	7.8	0.0	0.4	8.3
Clarion	93.5	0.6	4.7	98.9
Clearfield	212.3	1.3	10.7	224.4
Clinton	108.0	0.6	5.5	114.1
Elk	47.2	0.3	2.4	49.9
Forest	18.5	0.1	0.9	19.5
Jefferson	82.2	0.5	4.2	86.8
Lycoming	269.3	1.7	13.6	284.6
McKean	123.2	0.7	6.2	130.1
Potter	27.0	0.2	1.4	28.6
Tioga	139.5	0.8	7.1	147.3
Warren	137.7	0.7	7.0	145.4
Pennsylvania Wilds	1,266.2	7.4	64.1	1,337.7

Pennsylvania Wilds – 2010 Industry Impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2010					
Cameron	9.0	74	1.3	0.4	0.4
Clarion	108.1	972	21.1	5.8	5.1
Clearfield	248.9	1,770	43.5	12.8	10.9
Clinton	136.6	952	21.2	6.7	5.6
Elk	52.3	488	8.9	2.7	2.3
Forest	20.4	135	2.5	1.0	0.7
Jefferson	102.9	747	18.5	5.3	4.6
Lycoming	308.7	2,707	63.1	16.9	14.9
McKean	158.9	1,112	26.6	8.1	6.8
Potter	30.1	206	4.5	1.5	1.2
Tioga	171.2	1,387	33.8	9.2	8.1
Warren	149.3	1,133	24.5	7.4	6.3
Pennsylvania Wilds	1,496.4	11,684	269.5	77.8	66.9
Percent Change	18.2%	9.7%	17.0%	6.7%	5.1%

Pennsylvania Wilds – 2009 Industry Impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2009					
Cameron	7.8	73	1.2	0.4	0.3
Clarion	93.5	899	18.3	5.5	4.8
Clearfield	212.3	1,594	37.5	12.0	10.4
Clinton	108.0	798	16.9	6.3	5.4
Elk	47.2	462	7.5	2.5	2.2
Forest	18.5	124	2.1	0.9	0.7
Jefferson	82.2	683	16.2	5.0	4.4
Lycoming	269.3	2,538	54.7	15.9	14.1
McKean	123.2	943	21.4	7.5	6.5
Potter	27.0	195	4.0	1.4	1.2
Tioga	139.5	1,215	27.4	8.6	7.7
Warren	137.7	1,123	23.1	6.9	6.0
Pennsylvania Wilds	1,266.2	10,648	230.3	72.9	63.7

Pennsylvania Wilds – 2010 Economy Impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2010					
Cameron	9.4	127	3.4	0.8	0.7
Clarion	113.8	1,546	46.0	10.2	10.2
Clearfield	261.7	2,862	93.5	22.5	22.0
Clinton	143.6	1,522	46.1	11.8	11.3
Elk	55.0	810	22.0	4.7	4.6
Forest	21.5	226	6.1	1.7	1.5
Jefferson	108.1	1,283	42.9	9.4	9.2
Lycoming	324.7	4,234	131.5	29.7	29.9
McKean	167.1	1,727	54.5	14.2	13.7
Potter	31.7	360	11.1	2.6	2.4
Tioga	180.1	2,093	66.2	16.2	16.2
Warren	156.9	1,788	52.8	13.0	12.7
Pennsylvania Wilds	1,573.5	18,576	576.2	136.8	134.6
Percent Change	17.6%	7.6%	11.7%	6.5%	5.1%

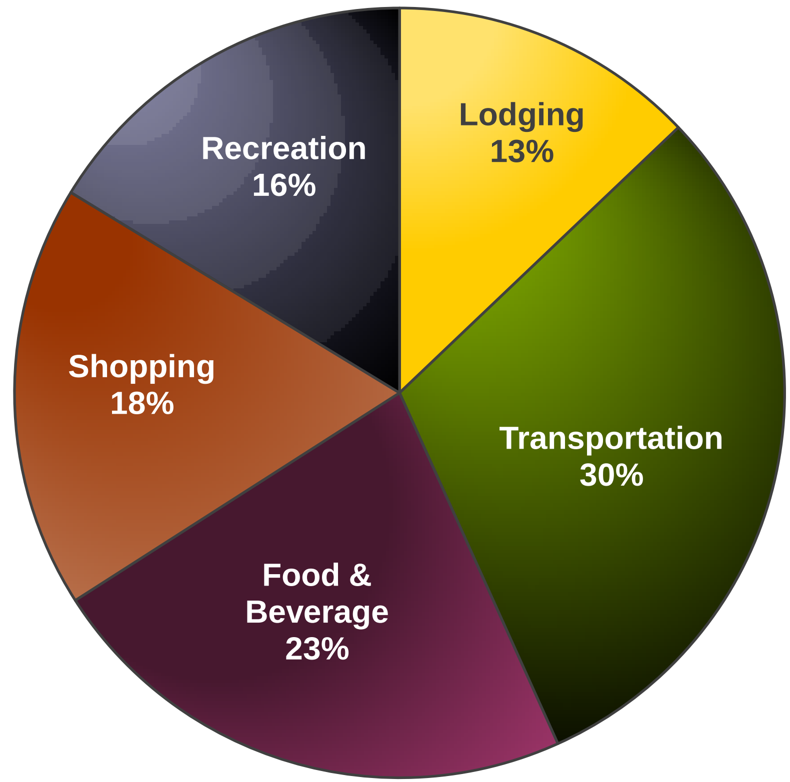
Pennsylvania Wilds – 2009 Economy Impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2009					
Cameron	8.3	125	3.2	0.7	0.7
Clarion	98.9	1,454	41.6	9.6	9.7
Clearfield	224.4	2,638	84.1	21.2	21.0
Clinton	114.1	1,326	39.5	11.1	10.8
Elk	49.9	776	19.7	4.4	4.3
Forest	19.5	211	5.5	1.6	1.4
Jefferson	86.8	1,200	39.3	8.8	8.8
Lycoming	284.6	4,022	118.7	27.9	28.5
McKean	130.1	1,513	46.6	13.2	13.1
Potter	28.6	346	10.3	2.4	2.3
Tioga	147.3	1,876	56.7	15.2	15.5
Warren	145.4	1,775	50.7	12.3	12.1
Pennsylvania Wilds	1,337.7	17,263	516.0	128.5	128.1

The Allegheny

- The Alleghenies is comprised of the following counties: Bedford, Blair, Cambria, Centre, Fulton, Huntingdon, Juniata, and Mifflin.
- Visitors spent $1.6 billion in The Alleghenies region in 2010.

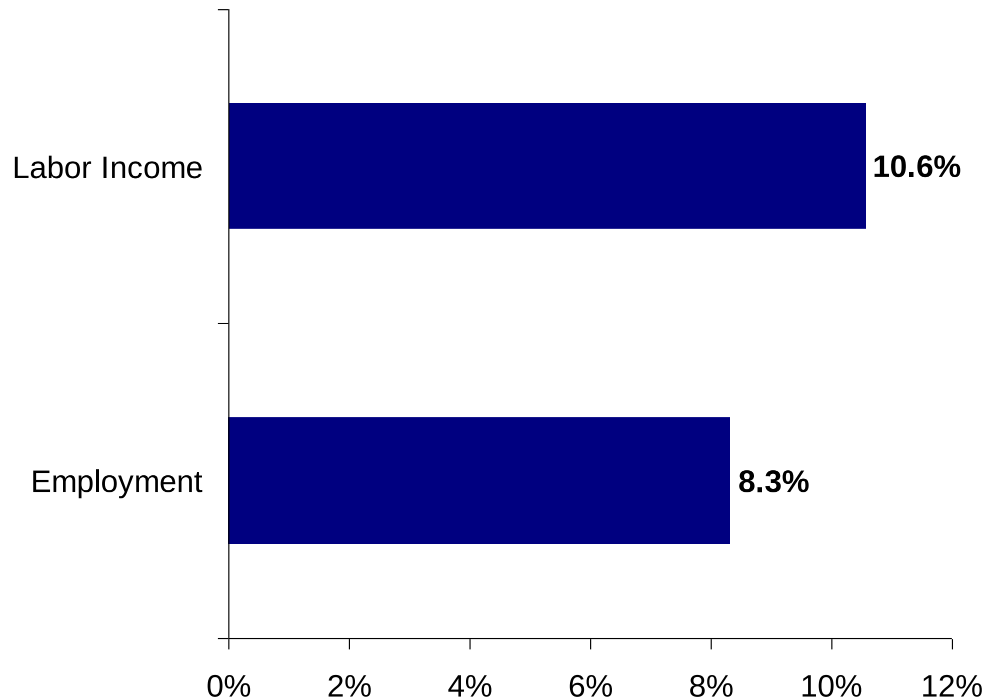
The Alleghenies Region Spending by Category



The Alleghenies

- The tourism industry grew 8.8% in 2010.
- The chart shows the travel economy (including indirect and induced impacts) share of the total region economy.
- Travel supported employment makes up 8.3% of the total regional economy.

Tourism Share of Regional Economy



The Alleghenies – Timeline

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

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

The Alleghenies – Tourism Direct Sales

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2010						
Bedford	38.5	55.2	43.3	43.0	83.1	263.0
Blair	27.6	60.4	51.4	45.4	86.5	271.2
Cambria	24.4	56.4	44.4	44.8	87.6	257.6
Centre	101.7	139.1	105.5	88.2	154.2	588.7
Fulton	1.2	3.9	3.5	3.6	7.1	19.3
Huntingdon	10.1	32.8	25.1	27.3	48.8	144.1
Juniata	1.6	7.7	5.6	5.3	10.8	31.0
Mifflin	5.6	15.7	11.3	8.2	18.2	58.9
The Alleghenies	210.6	371.2	290.0	265.8	496.3	1,633.9
Percent Change	6.9%	6.6%	6.9%	13.9%	9.8%	8.8%
2009						
Bedford	34.7	51.1	39.8	37.3	76.1	239.0
Blair	25.6	56.2	49.2	39.8	78.7	249.3
Cambria	23.1	53.7	41.3	39.8	80.6	238.5
Centre	95.8	131.1	99.0	77.5	142.1	545.6
Fulton	1.1	3.5	3.3	3.2	6.4	17.4
Huntingdon	9.7	30.2	22.9	23.8	42.5	129.1
Juniata	1.6	7.4	5.3	4.7	9.5	28.5
Mifflin	5.5	14.9	10.6	7.3	16.2	54.4
The Alleghenies	197.1	348.0	271.3	233.3	452.2	1,501.9

The Alleghenies – TSA Spending

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2010				
Bedford	263.0	1.3	12.1	276.4
Blair	271.2	1.4	12.5	285.1
Cambria	257.6	1.3	11.9	270.8
Centre	588.7	3.5	27.2	619.4
Fulton	19.3	0.1	0.9	20.2
Huntingdon	144.1	0.6	6.7	151.3
Juniata	31.0	0.1	1.4	32.6
Mifflin	58.9	0.3	2.7	61.9
The Alleghenies	1,633.9	8.5	75.4	1,717.8
Percent Change	8.8%	-6.2%	-0.8%	8.2%
2009				
Bedford	239.0	1.3	12.1	252.4
Blair	249.3	1.5	12.6	263.4
Cambria	238.5	1.4	12.1	252.0
Centre	545.6	3.7	27.6	576.9
Fulton	17.4	0.1	0.9	18.4
Huntingdon	129.1	0.7	6.5	136.3
Juniata	28.5	0.1	1.4	30.1
Mifflin	54.4	0.3	2.8	57.5
The Alleghenies	1,501.9	9.1	76.0	1,587.0

The Alleghenies – Industry Impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2010					
Bedford	263.0	2,026	52.3	14.0	12.4
Blair	271.2	2,499	61.8	15.3	13.9
Cambria	257.6	2,005	56.9	14.4	13.0
Centre	588.7	4,705	117.0	32.1	27.9
Fulton	19.3	152	3.4	1.0	0.8
Huntingdon	144.1	1,273	28.7	7.6	6.8
Juniata	31.0	218	4.4	1.4	1.2
Mifflin	58.9	583	12.1	3.2	2.8
The Alleghenies	1,633.9	13,460.3	336.6	89.0	79.0
Percent Change	8.8%	1.6%	7.5%	5.6%	5.1%
2009					
Bedford	239.0	1,977	47.5	13.3	11.8
Blair	249.3	2,446	57.5	14.5	13.3
Cambria	238.5	2,021	54.8	13.6	12.4
Centre	545.6	4,641	108.2	30.3	26.5
Fulton	17.4	143	3.0	0.9	0.8
Huntingdon	129.1	1,221	25.9	7.3	6.5
Juniata	28.5	239	4.9	1.4	1.2
Mifflin	54.4	567	11.2	3.0	2.7
The Alleghenies	1,501.9	13,253.8	313.0	84.3	75.2

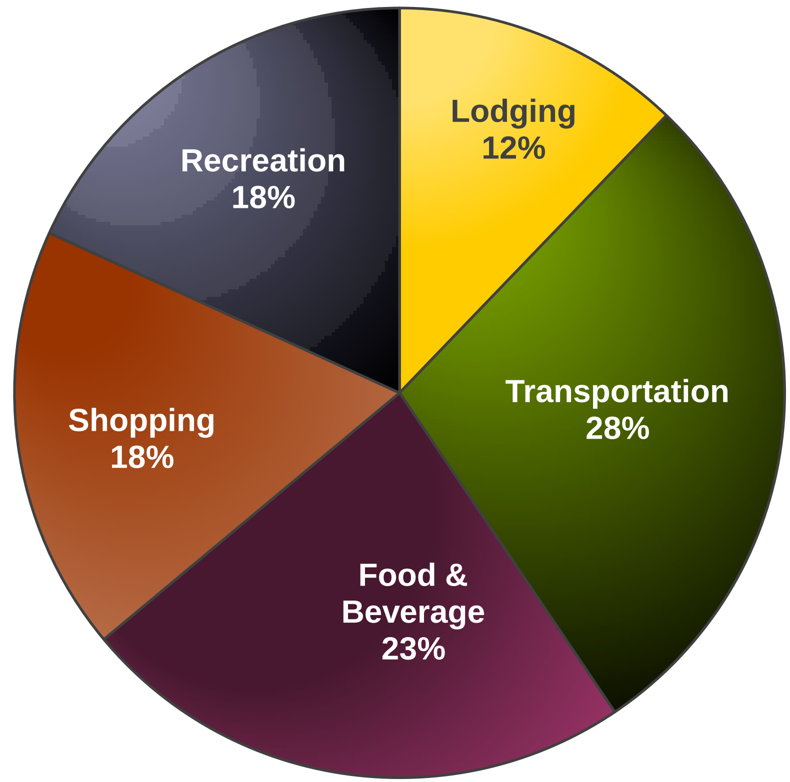
The Alleghenies – Economy Impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2010					
Bedford	276.4	2,995	98.5	24.8	25.1
Blair	285.1	3,990	130.3	27.1	28.1
Cambria	270.8	3,452	126.8	25.4	26.2
Centre	619.4	7,137	229.9	56.2	56.1
Fulton	20.2	278	8.9	1.7	1.7
Huntingdon	151.3	1,967	59.3	13.5	13.8
Juniata	32.6	443	13.9	2.6	2.4
Mifflin	61.9	1,023	31.0	5.6	5.7
The Alleghenies	1,717.8	21,285.8	698.7	156.9	159.0
Percent Change	8.2%	1.2%	5.3%	5.8%	5.1%
2009					
Bedford	252.4	2,936	91.6	23.4	23.8
Blair	263.4	3,923	123.9	25.6	26.7
Cambria	252.0	3,471	123.4	24.0	24.9
Centre	576.9	7,060	217.0	53.1	53.4
Fulton	18.4	267	8.3	1.6	1.6
Huntingdon	136.3	1,901	55.1	12.8	13.1
Juniata	30.1	468	14.7	2.4	2.3
Mifflin	57.5	1,003	29.4	5.3	5.5
The Alleghenies	1,587.0	21,029.8	663.3	148.4	151.4

Valleys of the Susquehanna

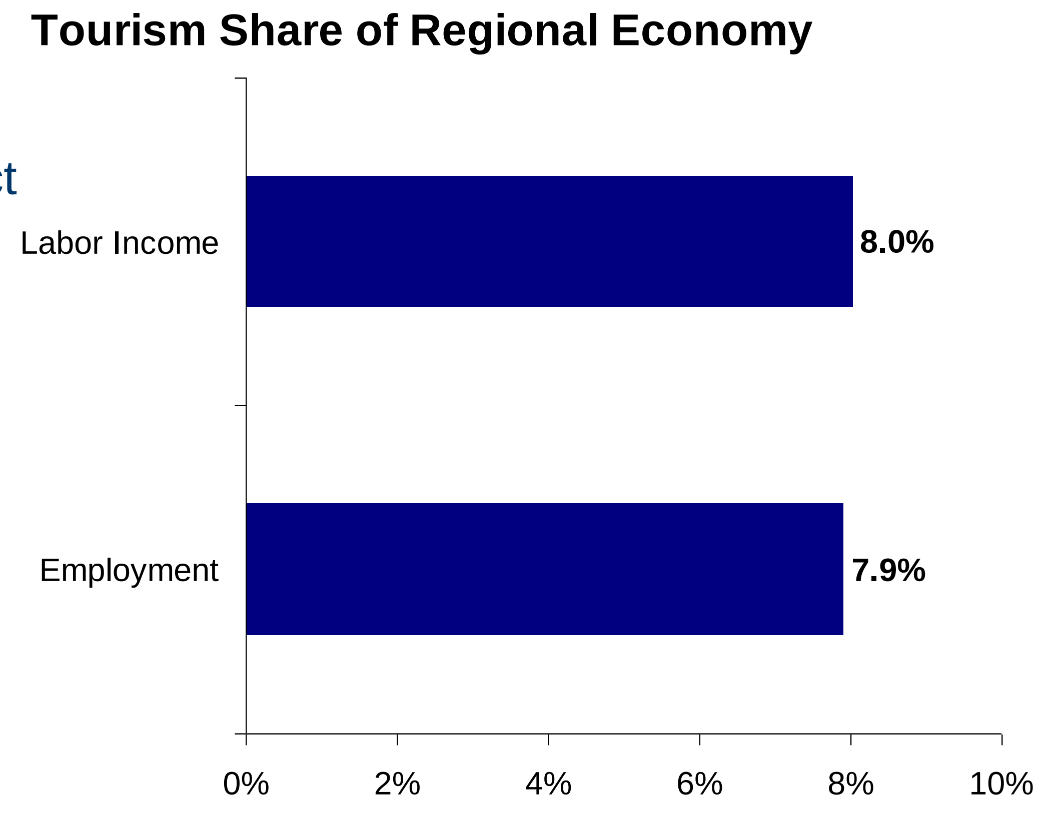
- The Valleys of the Susquehanna region is comprised of the following counties: Columbia, Montour, Northumberland, Snyder, and Union.
- Visitors spent $537 million in this region in 2010.
- In share terms, the Valleys of the Susquehanna had the highest spending in Food & Beverage than in any other region.

Valleys of the Susquehanna Region Spending by Category



Valleys of the Susquehanna

- The tourism industry grew 11% in 2010, outpacing the state.
- The chart shows the travel economy (including indirect and induced impacts) share of the total region economy.
- Travel supported employment comprised 7.9% of the total regional economy.



Valleys of the Susquehanna – Timeline

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

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

Valleys of the Susquehanna – Travel Direct Sales

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2010						
Columbia	16.5	32.2	23.0	22.1	33.8	127.6
Montour	14.9	19.9	15.5	18.8	18.9	88.0
Northumberland	4.2	21.4	14.9	26.0	46.8	113.3
Snyder	9.6	20.4	18.4	13.2	21.8	83.5
Union	20.2	31.4	24.2	17.5	30.9	124.3
Valleys of the Susquehanna	65.4	125.4	96.0	97.6	152.1	536.6
Percent Change	10.2%	7.2%	7.3%	15.7%	14.3%	11.0%
2009						
Columbia	14.7	30.0	21.1	19.1	29.6	114.5
Montour	13.4	18.4	14.2	16.1	17.0	79.2
Northumberland	4.1	20.2	13.9	22.0	38.9	99.1
Snyder	8.5	18.7	17.3	11.5	18.8	74.9
Union	18.7	29.6	23.0	15.7	28.7	115.7
Valleys of the Susquehanna	59.4	117.0	89.5	84.4	133.1	483.3

Valleys of the Susquehanna – TSA Spending

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2010				
Columbia	127.6	0.7	5.9	134.2
Montour	88.0	0.5	4.1	92.6
Northumberland	113.3	0.4	5.2	119.0
Snyder	83.5	0.4	3.9	87.8
Union	124.3	0.8	5.7	130.8
Valleys of the Susquehanna	536.6	2.9	24.8	564.3
Percent Change	11.0%	-1.3%	1.2%	10.5%
2009				
Columbia	114.5	0.7	5.8	121.0
Montour	79.2	0.5	4.0	83.7
Northumberland	99.1	0.5	5.0	104.6
Snyder	74.9	0.5	3.8	79.1
Union	115.7	0.8	5.9	122.3
Valleys of the Susquehanna	483.3	3.0	24.5	510.7

Valleys of the Susquehanna – Industry Impacts

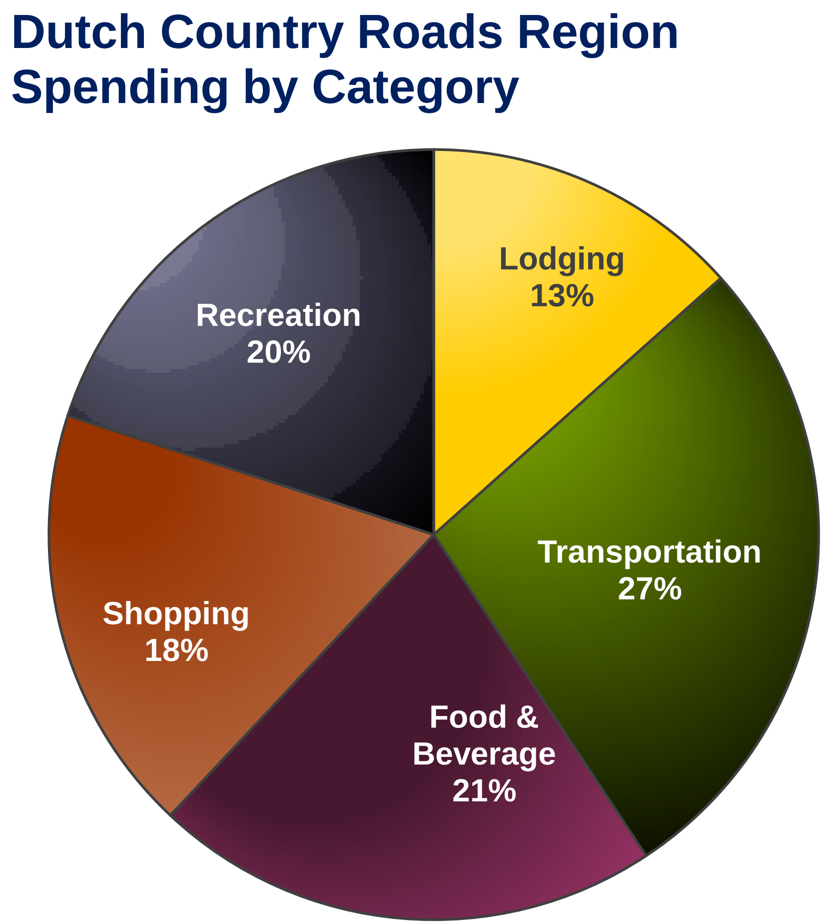
Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2010					
Columbia	127.6	1,171	24.1	6.8	5.9
Montour	88.0	823	18.8	4.9	4.3
Northumberland	113.3	988	25.2	6.2	5.7
Snyder	83.5	691	14.5	4.3	3.7
Union	124.3	1,126	25.9	6.9	6.0
Valleys of the Susquehanna	536.6	4,798.8	108.5	29.1	25.7
Percent Change	11.0%	3.3%	10.9%	6.0%	5.1%
2009					
Columbia	114.5	1,141	22.6	6.4	5.6
Montour	79.2	800	17.3	4.7	4.1
Northumberland	99.1	943	22.5	5.9	5.5
Snyder	74.9	665	12.9	4.0	3.5
Union	115.7	1,098	22.5	6.5	5.8
Valleys of the Susquehanna	483.3	4,647.2	97.8	27.5	24.4

Valleys of the Susquehanna – Economy Impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2010					
Columbia	134.2	1,910	55.5	11.9	11.8
Montour	92.6	1,202	35.6	8.7	8.8
Northumberland	119.0	1,794	62.3	11.1	11.6
Snyder	87.8	1,139	33.6	7.5	7.3
Union	130.8	1,747	53.5	12.1	12.2
Valleys of the Susquehanna	564.3	7,792.4	240.5	51.3	51.6
Percent Change	10.5%	2.5%	7.4%	6.0%	5.1%
2009					
Columbia	121.0	1,872	53.1	11.2	11.2
Montour	83.7	1,175	33.6	8.2	8.3
Northumberland	104.6	1,736	57.8	10.5	11.0
Snyder	79.1	1,106	31.2	7.1	7.0
Union	122.3	1,712	48.3	11.4	11.6
Valleys of the Susquehanna	510.7	7,600.5	223.9	48.4	49.2

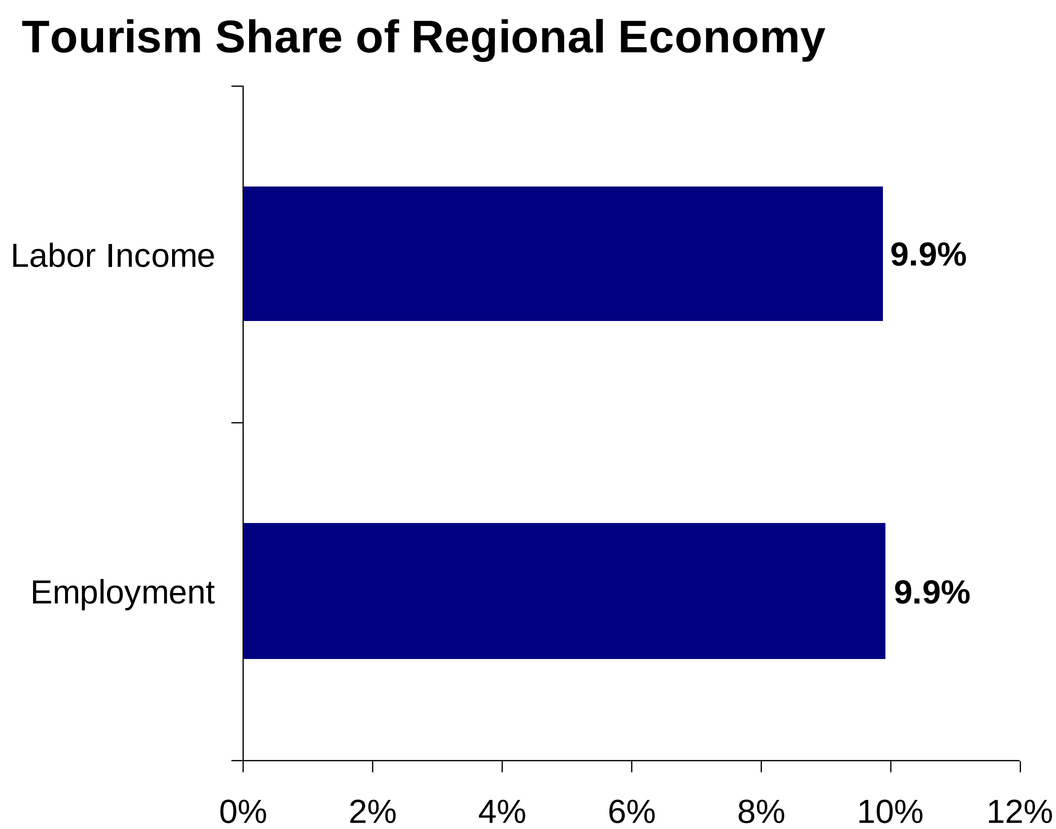
Dutch Country Roads

- The Dutch Country Roads region is comprised of the following counties: Adams, Cumberland, Dauphin, Franklin, Lancaster, Lebanon, Perry, and York.
- Visitors spent $6.9 billion in the Dutch Country Roads region in 2010.



Dutch Country Roads

- Traveler spending in the region grew 8.0% in 2010, led by growth in Lancaster County.
- The chart shows the travel economy (including indirect and induced impacts) share of the total region economy.
- Travel supported nearly 10% of both employment and labor income in the region.



Dutch Country Roads – Timeline

Tourism Industry Spending (Millions of dollars)						
County	2005	2006	2007	2008	2009	2010
Adams	479.1	502.2	535.1	602.8	520.9	555.8
Berks	643.8	650.6	668.1	746.9	623.7	687.7
Cumberland	634.4	657.6	674.9	774.2	628.3	677.8
Dauphin	1,704.3	1,801.6	1,867.7	2,142.4	1,878.7	2,013.3
Franklin	248.3	259.6	280.8	322.2	270.2	286.5
Lancaster	1,436.6	1,464.4	1,498.0	1,706.5	1,523.1	1,669.7
Lebanon	152.4	154.8	158.9	182.2	159.9	170.9
Perry	43.0	42.9	44.2	48.6	40.6	43.6
York	720.2	741.2	764.3	829.2	706.5	753.5
Dutch Country Roads	6,062.2	6,274.7	6,491.9	7,355.2	6,351.8	6,858.9
Percent Change		3.5%	3.5%	13.3%	-13.6%	8.0%

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

Dutch Country Roads – Travel Direct Sales

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2010						
Adams	76.2	116.2	106.4	124.9	132.1	555.8
Berks	67.7	155.8	137.0	124.4	202.9	687.7
Cumberland	95.8	160.4	123.0	112.2	186.4	677.8
Dauphin	307.9	387.0	316.3	469.8	532.4	2,013.3
Franklin	29.5	62.6	48.5	51.0	94.9	286.5
Lancaster	227.4	358.8	332.3	303.4	447.8	1,669.7
Lebanon	14.2	41.7	34.8	30.1	50.0	170.9
Perry	1.8	10.2	7.3	9.6	14.5	43.6
York	76.7	175.6	145.1	131.1	225.0	753.5
Dutch Country Roads	897.3	1,468.3	1,250.6	1,356.5	1,886.1	6,858.9
Percent Change	6.2%	5.6%	6.9%	11.4%	9.1%	8.0%
2009						
Adams	73.2	111.2	102.1	112.2	122.1	520.9
Berks	63.1	147.8	127.0	113.3	172.4	623.7
Cumberland	90.1	151.4	115.7	99.5	171.7	628.3
Dauphin	292.1	367.9	299.4	420.6	498.7	1,878.7
Franklin	29.8	60.7	46.4	47.5	85.8	270.2
Lancaster	206.0	332.6	301.9	267.1	415.4	1,523.1
Lebanon	14.2	39.9	33.0	27.2	45.5	159.9
Perry	1.6	9.6	6.8	9.9	12.7	40.6
York	74.5	168.7	137.6	120.5	205.2	706.5
Dutch Country Roads	844.7	1,389.9	1,169.9	1,217.8	1,729.5	6,351.8

Dutch Country Roads – TSA Spending

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2010				
Adams	555.8	3.2	25.7	584.6
Berks	687.7	3.9	31.7	723.3
Cumberland	677.8	3.9	31.3	713.0
Dauphin	2,013.3	15.5	92.9	2,121.8
Franklin	286.5	1.5	13.2	301.2
Lancaster	1,669.7	11.8	77.1	1,758.6
Lebanon	170.9	0.8	7.9	179.6
Perry	43.6	0.2	2.0	45.8
York	753.5	4.0	34.8	792.3
Dutch Country Roads	6,858.9	44.8	316.6	7,220.2
Percent Change	8.0%	-2.6%	-1.5%	7.5%
2009				
Adams	520.9	3.4	26.4	550.6
Berks	623.7	3.9	31.6	659.2
Cumberland	628.3	3.8	31.8	663.9
Dauphin	1,878.7	16.0	95.1	1,989.8
Franklin	270.2	1.7	13.7	285.6
Lancaster	1,523.1	11.8	77.1	1,612.0
Lebanon	159.9	0.9	8.1	168.9
Perry	40.6	0.2	2.1	42.8
York	706.5	4.3	35.8	746.6
Dutch Country Roads	6,351.8	46.0	321.5	6,719.3

Dutch Country Roads – Industry Impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2010					
Adams	555.8	4,771	122.4	31.4	28.0
Berks	687.7	6,173	154.6	39.0	35.1
Cumberland	677.8	5,812	137.5	37.1	32.5
Dauphin	2,013.3	17,735	514.4	124.7	111.3
Franklin	286.5	2,276	56.7	15.4	13.5
Lancaster	1,669.7	14,640	345.4	94.2	80.9
Lebanon	170.9	1,534	43.8	10.1	9.5
Perry	43.6	302	6.9	2.1	1.8
York	753.5	7,038	168.8	42.5	38.3
Dutch Country Roads	6,858.9	60,281	1,550.4	396.3	350.9
Percent Change	8.0%	0.3%	5.7%	5.7%	5.1%
2009					
Adams	520.9	4,835	118.3	29.7	26.6
Berks	623.7	6,067	140.1	36.9	33.4
Cumberland	628.3	5,909	134.7	34.8	30.9
Dauphin	1,878.7	17,583	485.1	118.3	106.0
Franklin	270.2	2,298	53.5	14.6	12.9
Lancaster	1,523.1	14,381	323.5	88.8	77.0
Lebanon	159.9	1,544	41.8	9.6	9.0
Perry	40.6	296	6.7	2.0	1.7
York	706.5	7,213	162.5	40.2	36.5
Dutch Country Roads	6,351.8	60,127	1,466.3	374.9	334.0

Dutch Country Roads – Economy Impacts

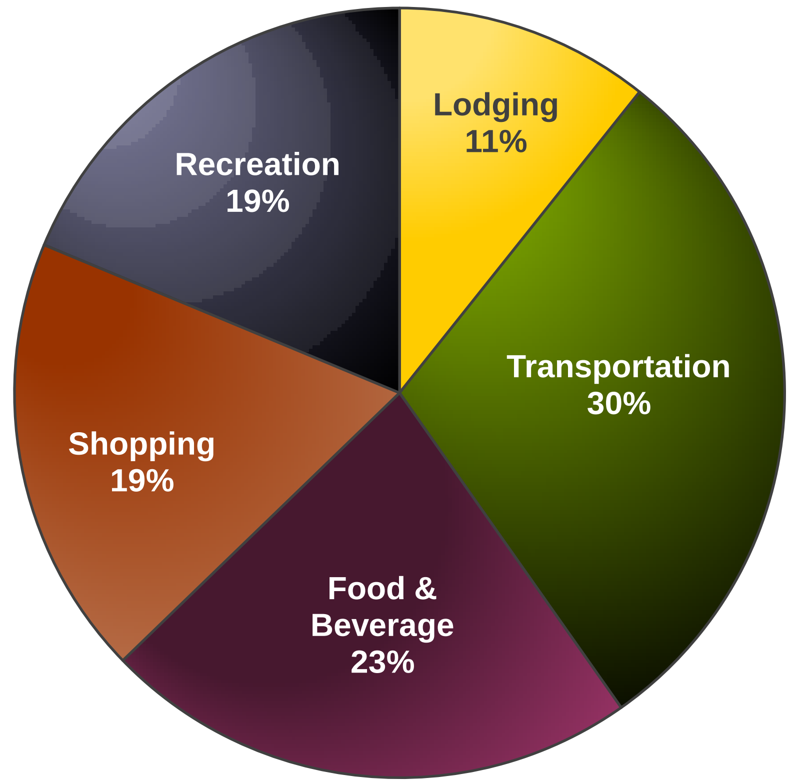
Total Tourism Economy Impacts
(Millions of dollars - except Employment, in Units)

County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2010					
Adams	584.6	7,157	235.4	55.1	56.4
Berks	708.8	10,300	344.4	68.7	70.6
Cumberland	713.0	8,993	281.0	65.1	65.4
Dauphin	2,121.8	25,056	897.6	216.6	224.5
Franklin	301.2	3,823	127.6	27.1	27.2
Lancaster	1,758.6	22,240	688.4	163.7	162.9
Lebanon	179.6	2,724	101.0	17.9	19.1
Perry	45.8	657	22.5	3.7	3.6
York	792.3	11,579	374.1	74.9	77.2
Dutch Country Roads	7,205.7	92,528	3,071.9	692.8	707.0
Percent Change	1.0%	0.2%	4.1%	5.8%	5.0%
2009					
Adams	550.6	7,244	230.0	52.1	53.7
Berks	1,072.7	10,165	321.8	64.9	67.2
Cumberland	663.9	9,121	277.3	61.2	62.2
Dauphin	1,989.8	24,893	859.1	205.4	213.7
Franklin	285.6	3,850	122.6	25.7	25.9
Lancaster	1,612.0	21,925	656.5	154.4	155.1
Lebanon	168.9	2,735	97.7	17.0	18.2
Perry	42.8	648	21.9	3.5	3.5
York	746.6	11,801	364.2	70.9	73.5
Dutch Country Roads	7,132.8	92,383	2,951.3	655.0	673.0

Upstate PA

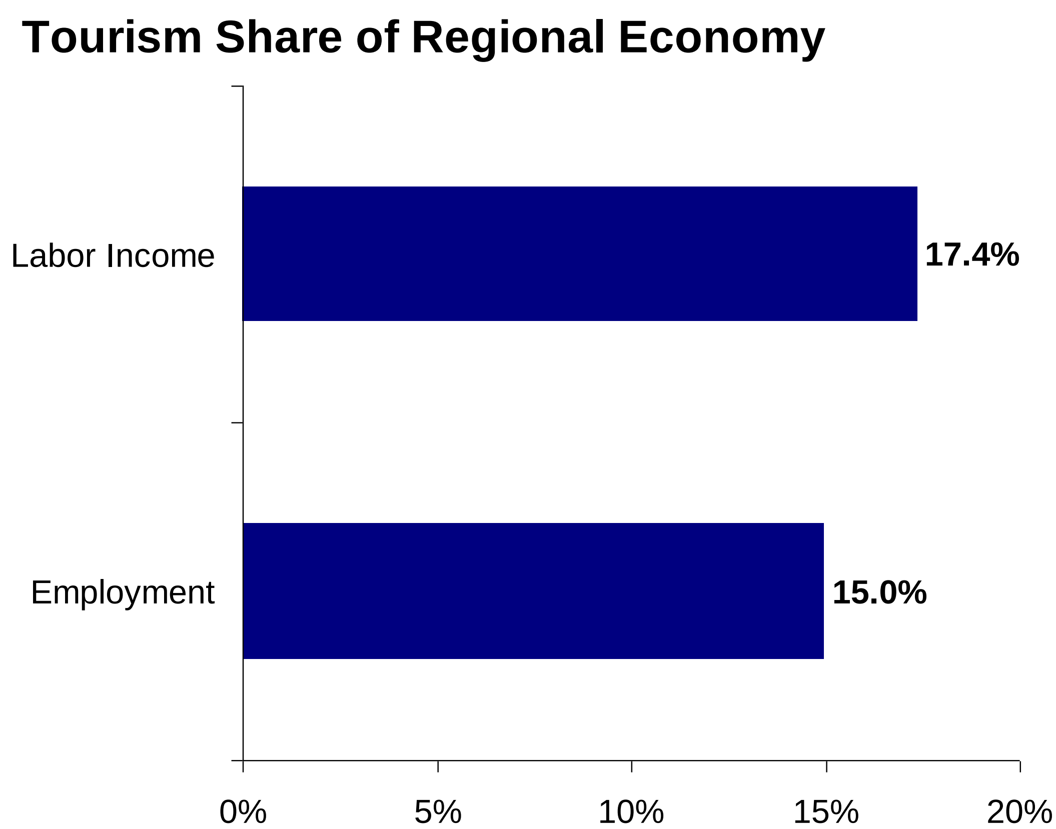
- The Upstate PA region is comprised of the following counties: Bradford, Lackawanna, Luzerne, Schuylkill, Sullivan, Susquehanna, and Wyoming.
- Visitors spent $1.9 billion in the Upstate PA region in 2010.
- Traveler spending in the region rebounded strongly in 2010.

Upstate PA Region Spending by Category



Upstate PA

- Overall, the tourism industry grew 9.3% in 2010, in step with the state.
- The chart shows the tourism economy (including indirect and induced impacts) share of the total region economy.
- This region of the state has the highest tourism share among all the regions.



Upstate PA – Timeline

Tourism Industry Spending (in millions of dollars)						
County	2005	2006	2007	2008	2009	2010
Bradford	125.2	126.4	134.7	148.3	136.3	170.0
Lackawanna	478.4	482.8	514.4	566.5	483.1	536.5
Luzerne	674.5	702.6	752.5	818.6	708.3	795.5
Schuylkill	164.3	168.8	177.5	195.2	158.5	159.2
Sullivan	12.7	12.3	12.9	14.4	13.1	16.0
Susquehanna	107.5	112.6	121.5	140.4	122.7	141.6
Wyoming	33.2	35.3	37.0	40.3	36.8	41.3
Upstate PA	1,596.0	1,640.7	1,750.4	1,923.7	1,658.6	1,860.2
Percent Change		2.8%	6.7%	9.9%	-13.8%	12.2%

Tourism Industry Employment Impacts						
County	2005	2006	2007	2008	2009	2010
Bradford	1,017	1,014	1,011	1,031	1,037	1,252
Lackawanna	4,537	4,626	4,769	4,855	4,563	4,752
Luzerne	5,789	6,028	6,142	6,253	5,978	6,275
Schuylkill	1,207	1,215	1,254	1,287	1,187	1,165
Sullivan	109	111	116	118	117	138
Susquehanna	1,022	1,053	1,059	1,044	1,002	1,024
Wyoming	349	351	359	364	365	362
Upstate PA	14,030	14,399	14,709	14,952	14,250	14,967
Percent Change		2.6%	2.2%	1.7%	-4.7%	5.0%

Upstate PA – Visitor Spending

Tourism Direct Sales (in millions of dollars)						
County	**Lodging**	**Food & beverage**	**Retail**	**Recreation**	**Transport**	**Total**
2010						
Bradford	16.2	37.8	27.6	28.6	60.0	170.0
Lackawanna	67.6	125.5	118.2	96.8	128.4	536.5
Luzerne	88.0	171.0	137.7	159.6	239.2	795.5
Schuylkill	12.1	40.4	29.2	24.9	52.5	159.2
Sullivan	2.0	2.8	2.2	4.6	4.4	16.0
Susquehanna	8.4	31.2	22.7	26.8	52.4	141.6
Wyoming	5.4	9.6	7.0	6.8	12.5	41.3
Upstate PA	199.8	418.3	344.6	348.1	549.3	1,860.2
Percent Change	14.3%	7.9%	11.1%	18.7%	11.5%	12.2%
2009						
Bradford	11.9	31.6	23.0	22.4	47.4	136.3
Lackawanna	60.6	116.3	106.1	85.7	114.5	483.1
Luzerne	77.2	161.5	125.0	130.4	214.2	708.3
Schuylkill	12.1	39.0	28.0	22.6	56.7	158.5
Sullivan	1.5	2.5	1.9	3.8	3.5	13.1
Susquehanna	6.8	27.9	20.0	22.6	45.4	122.7
Wyoming	4.8	8.8	6.3	5.8	11.0	36.8
Upstate PA	174.9	387.5	310.2	293.3	492.7	1,658.6

Upstate PA – TSA

Tourism Satellite Account Categories (in millions of dollars)				
County	Visitor Spending	Government	Investment & Non-visitor PCS	Total Tourism Demand
2010				
Bradford	170.0	0.9	7.8	178.8
Lackawanna	536.5	3.3	24.8	564.6
Luzerne	795.5	5.0	36.7	837.2
Schuylkill	159.2	0.8	7.3	167.3
Sullivan	16.0	0.1	0.7	16.8
Susquehanna	141.6	0.6	6.5	148.7
Wyoming	41.3	0.2	1.9	43.5
Upstate PA	1,860.2	10.8	85.9	1,956.8
Percent Change	12.2%	0.9%	2.3%	11.6%
2009				
Bradford	136.3	0.8	6.9	144.0
Lackawanna	483.1	3.3	24.5	510.9
Luzerne	708.3	4.8	35.8	749.0
Schuylkill	158.5	0.9	8.0	167.3
Sullivan	13.1	0.1	0.7	13.8
Susquehanna	122.7	0.6	6.2	129.5
Wyoming	36.8	0.2	1.9	38.9
Upstate PA	1,658.6	10.7	83.9	1,753.3

Upstate PA – Industry Impacts

Tourism Industry Impacts ***(in millions of dollars - except Employment, in Units)***					
County	**Visitor Spend**	**Employment**	**Labor Income**	**Taxes**	
				State & Local	**Federal**
2010					
Bradford	170.0	1,252	26.6	8.4	7.0
Lackawanna	536.5	4,752	109.7	29.6	25.8
Luzerne	795.5	6,275	160.0	43.8	37.9
Schuylkill	159.2	1,165	33.1	8.6	7.7
Sullivan	16.0	138	3.0	0.8	0.7
Susquehanna	141.6	1,024	19.4	6.6	5.5
Wyoming	41.3	362	7.2	2.1	1.8
Upstate PA	1,860.2	14,967	359.0	100.0	86.5
Percent Change	12.2%	5.0%	10.8%	6.2%	5.1%
2009					
Bradford	136.3	1,037	20.7	7.9	6.7
Lackawanna	483.1	4,563	100.2	28.0	24.6
Luzerne	708.3	5,978	142.1	41.2	36.1
Schuylkill	158.5	1,187	32.1	8.2	7.4
Sullivan	13.1	117	2.3	0.8	0.7
Susquehanna	122.7	1,002	19.2	6.2	5.2
Wyoming	36.8	365	7.4	2.0	1.7
Upstate PA	1,658.6	14,250	324.0	94.2	82.3

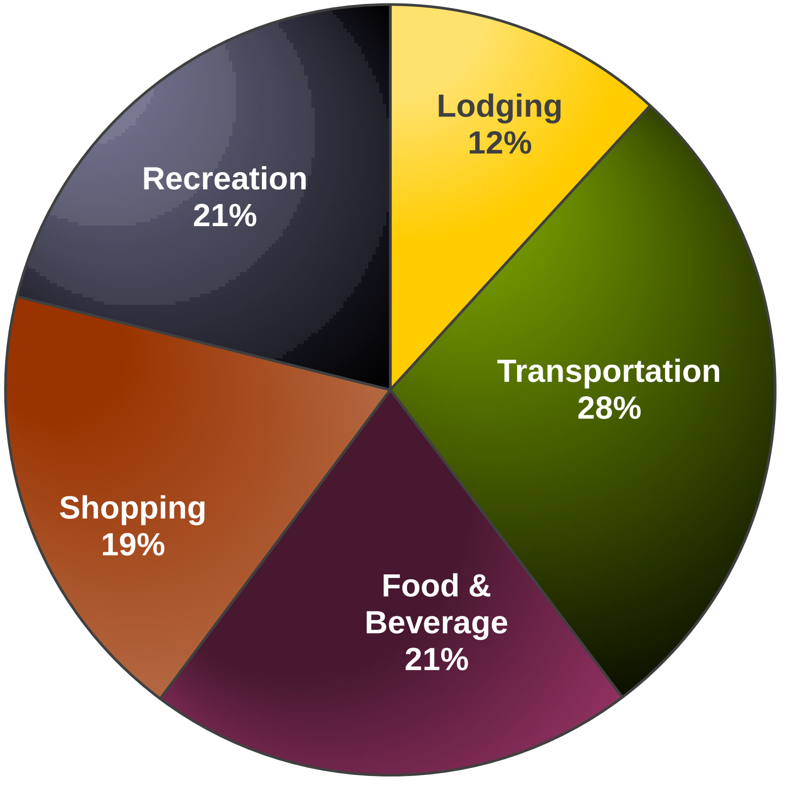
Upstate PA – Economy Impacts

Tourism Economy Impacts ***(in millions of dollars - except Employment, in Units)***					
County	**Total Tourism Demand**	**Employment**	**Labor Income**	**Taxes**	
				State & Local	**Federal**
2010					
Bradford	178.8	2,012	59.2	14.8	14.1
Lackawanna	564.6	7,492	231.7	51.9	52.0
Luzerne	837.2	10,130	339.6	76.5	76.3
Schuylkill	167.3	2,327	87.8	15.3	15.6
Sullivan	16.8	213	6.3	1.5	1.5
Susquehanna	148.7	1,636	44.4	11.7	11.0
Wyoming	43.5	613	17.8	3.7	3.7
Upstate PA	1,956.8	24,423	786.7	175.3	174.2
Percent Change	11.6%	3.9%	7.4%	6.1%	5.1%
2009					
Bradford	144.0	1,739	50.0	13.9	13.5
Lackawanna	510.9	7,255	217.3	49.0	49.5
Luzerne	749.0	9,755	312.1	72.1	72.7
Schuylkill	167.3	2,353	85.8	14.4	14.8
Sullivan	13.8	187	5.2	1.4	1.4
Susquehanna	129.5	1,609	44.1	11.0	10.4
Wyoming	38.9	616	18.0	3.5	3.5
Upstate PA	1,753.3	23,513	732.5	165.2	165.8

Pocono Mountains

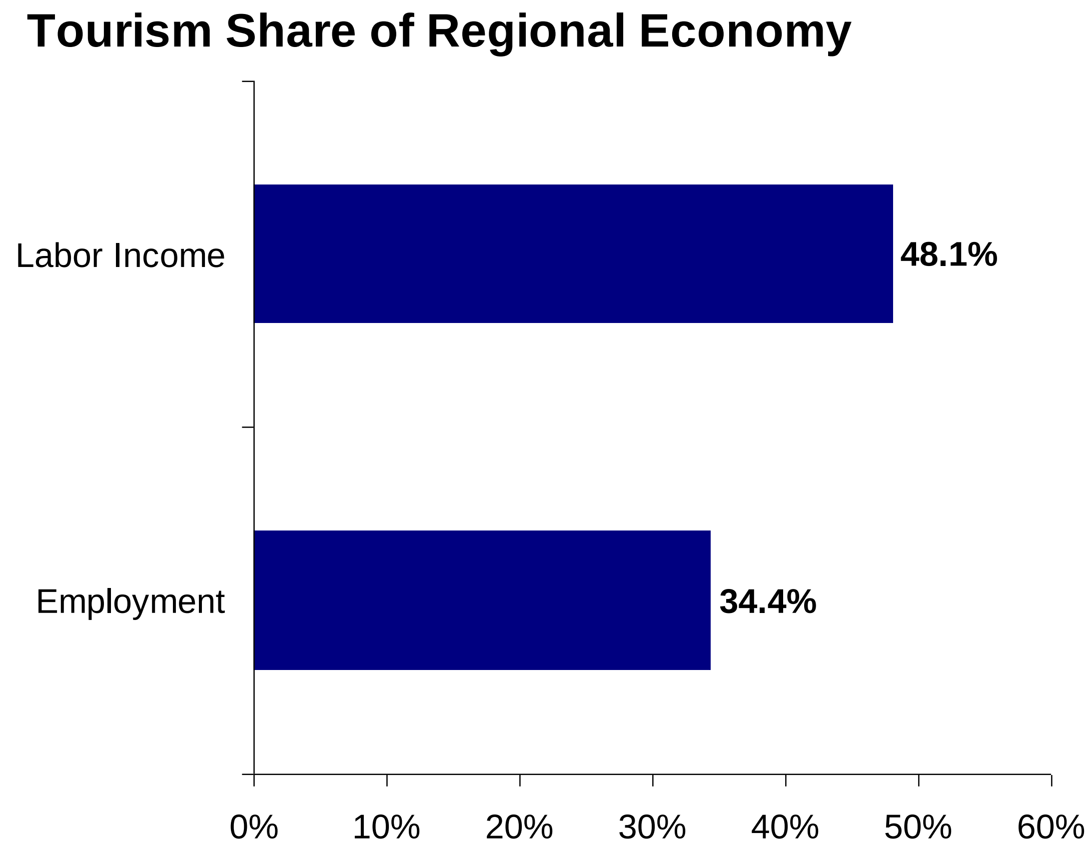
- The Pocono Mountains region is comprised of the following counties: Carbon, Monroe, Pike, and Wayne.
- Visitors spent $2.8 billion in the Pocono Mountains region in 2010, making the region the 4th largest in terms of traveler spending among the eleven regions.

Pocono Mountains Region Spending by Category



Pocono Mountains

- Overall, the travel industry grew 7.3% in 2010.
- The chart shows the travel economy (including indirect and induced impacts) share of the total region economy.
- This region of the state has the highest travel share among all the regions.



Pocono Mountains – Timeline

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

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

Pocono Mountains – Visitor Spending

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2010						
Carbon	36.2	65.4	52.3	64.2	96.7	314.7
Monroe	189.8	290.6	299.2	347.8	374.8	1,502.1
Pike	56.7	118.7	93.4	94.5	174.7	538.0
Wayne	46.3	94.9	74.2	78.2	128.8	422.4
Pocono Mountains	328.9	569.6	519.1	584.7	775.0	2,777.2
Percent Change	3.3%	3.9%	5.0%	13.5%	8.9%	7.3%
2009						
Carbon	36.5	63.3	50.0	57.8	86.9	294.5
Monroe	182.9	276.5	279.5	297.3	336.3	1,372.6
Pike	55.6	116.9	92.7	89.3	166.2	520.7
Wayne	43.4	91.7	72.0	70.8	122.5	400.4
Pocono Mountains	318.5	548.4	494.1	515.2	711.9	2,588.2

Pocono Mountains – TSA

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2010				
Carbon	314.7	1.5	14.5	330.7
Monroe	1,502.1	8.1	69.3	1,579.5
Pike	538.0	2.6	24.8	565.4
Wayne	422.4	1.8	19.5	443.8
Pocono Mountains	2,777.2	14.0	128.2	2,919.3
Percent Change	7.3%	-6.3%	-2.2%	6.8%
2009				
Carbon	294.5	1.6	14.9	311.0
Monroe	1,372.6	8.4	69.5	1,450.5
Pike	520.7	2.9	26.4	549.9
Wayne	400.4	2.0	20.3	422.7
Pocono Mountains	2,588.2	14.9	131.0	2,734.1

Pocono Mountains – Industry Impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2010					
Carbon	314.7	2,717	60.1	16.5	14.5
Monroe	1,502.1	12,937	358.2	86.9	79.5
Pike	538.0	4,856	140.0	32.0	30.1
Wayne	422.4	3,107	89.7	22.9	20.8
Pocono Mountains	2,777.2	23,617.4	648.0	158.3	144.9
Percent Change	7.3%	-1.4%	5.0%	5.8%	5.1%
2009					
Carbon	294.5	2,766	57.3	15.2	13.8
Monroe	1,372.6	12,780	328.3	82.4	75.6
Pike	520.7	5,257	145.4	30.4	28.7
Wayne	400.4	3,151	86.0	21.7	19.8
Pocono Mountains	2,588.2	23,954.3	617.0	149.6	137.9

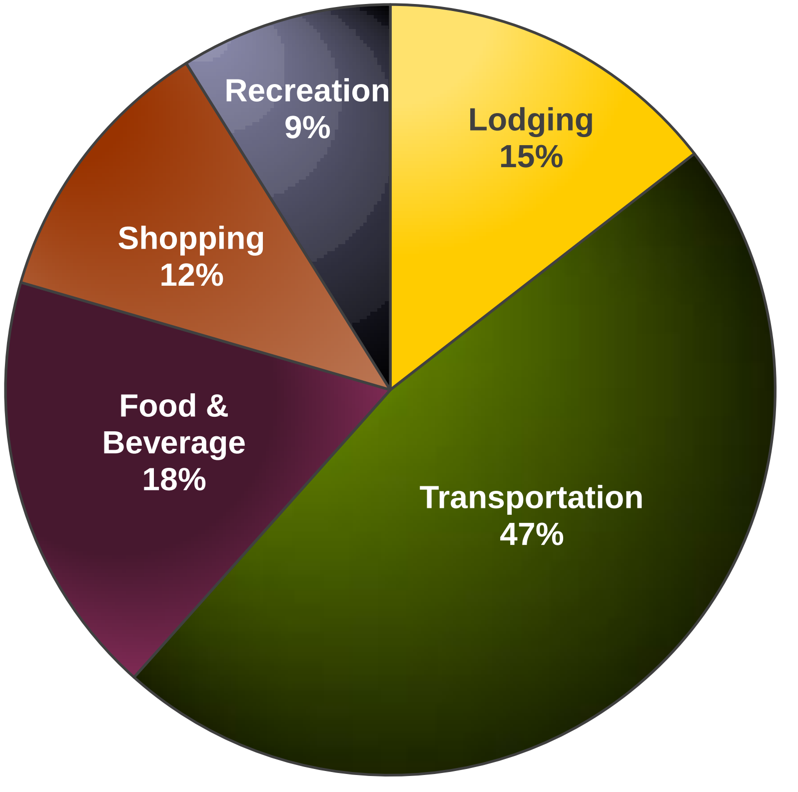
Pocono Mountains – Economy Impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2010					
Carbon	330.7	4,008	116.4	29.2	29.3
Monroe	1,579.5	18,570	641.6	153.4	160.2
Pike	565.4	6,897	246.1	56.8	60.7
Wayne	443.8	4,584	165.2	40.7	41.9
Pocono Mountains	2,919.3	34,059.0	1,169.2	280.1	292.0
Percent Change	6.8%	-1.3%	3.6%	5.8%	5.0%
2009					
Carbon	311.0	4,074	112.6	27.2	27.9
Monroe	1,450.5	18,390	599.6	145.2	152.5
Pike	549.9	7,414	256.1	53.8	57.8
Wayne	422.7	4,644	160.3	38.5	39.9
Pocono Mountains	2,734.1	34,522.9	1,128.6	264.7	278.0

Philadelphia & The Countryside

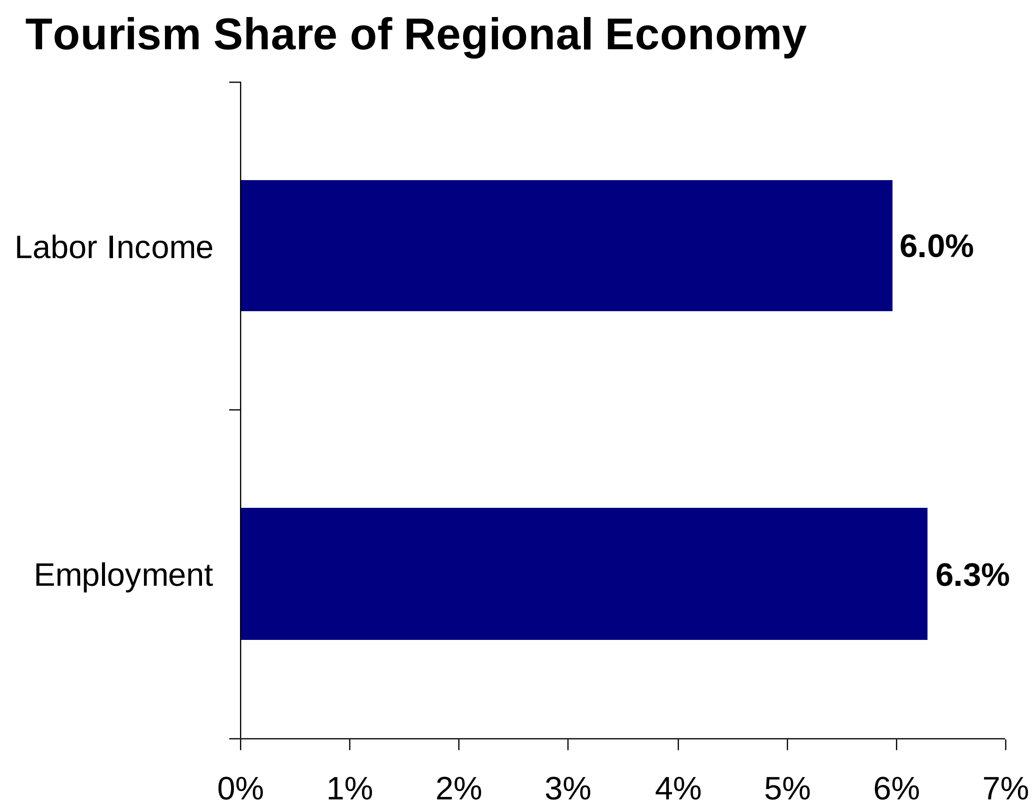
- Philadelphia and The Countryside region is comprised of the following counties: Bucks, Chester, Delaware, Montgomery, and Philadelphia.
- Visitors spent $8.0 billion in the Philadelphia & The Countryside region in 2010.
- The region ranked 1st in spending on lodging and food & beverage sales.

Philadelphia & The Countryside Region Spending by Category



Philadelphia & The Countryside

- Spending growth in 2010 measured 6.4%.
- The chart shows the tourism economy (including indirect and induced impacts) share of the total region economy.
- Despite the larger tourism spending numbers and tourism employment, the tourism industry is a smaller portion of the overall economy than found in other regions.



Philadelphia & The Countryside – Timeline

Tourism Industry Spending (Millions of dollars)						
County	2005	2006	2007	2008	2009	2010
Bucks	582.1	602.8	640.3	704.5	629.2	673.2
Chester	543.8	557.7	595.5	680.1	608.2	646.7
Delaware	498.1	510.7	558.2	613.9	530.4	564.5
Montgomery	985.2	1,014.0	1,079.3	1,176.2	1,014.2	1,070.8
Philadelphia	4,401.4	4,673.9	4,879.8	5,334.7	4,736.2	5,044.0
Philadelphia & The Countryside	7,010.6	7,359.0	7,753.2	8,509.5	7,518.1	7,999.1
Percent Change		5.0%	5.4%	9.8%	-11.7%	6.4%

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

Philadelphia & The Countryside – Visitor Spending

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2010						
Bucks	108.4	146.3	102.0	82.0	234.4	673.2
Chester	113.3	148.7	91.3	71.6	221.8	646.7
Delaware	73.8	120.7	74.2	62.6	233.2	564.5
Montgomery	241.7	214.7	131.9	82.3	400.1	1,070.8
Philadelphia	652.7	770.2	473.2	346.4	2,801.6	5,044.0
Philadelphia & The Countryside	1,189.9	1,400.6	872.6	645.0	3,891.1	7,999.1
Percent Change	4.8%	7.3%	6.6%	5.1%	6.8%	6.4%
2009						
Bucks	101.0	136.4	95.1	76.6	220.2	629.2
Chester	105.7	138.3	85.6	70.0	208.6	608.2
Delaware	69.9	109.3	67.6	57.1	226.6	530.4
Montgomery	224.6	205.9	127.4	85.9	370.3	1,014.2
Philadelphia	634.4	715.8	442.9	324.4	2,618.7	4,736.2
Philadelphia & The Countryside	1,135.5	1,305.8	818.5	613.9	3,644.4	7,518.1

Philadelphia & The Countryside - TSA

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2010				
Bucks	673.2	4.6	31.1	708.8
Chester	646.7	3.8	29.9	680.3
Delaware	564.5	3.2	26.1	593.8
Montgomery	1,070.8	6.9	49.4	1,127.1
Philadelphia	5,044.0	58.1	232.8	5,334.8
Philadelphia & The Countryside	7,999.1	76.6	369.2	8,444.9
Percent Change	6.4%	-1.2%	-3.0%	5.9%
2009				
Bucks	629.2	4.7	31.8	665.7
Chester	608.2	4.0	30.8	643.0
Delaware	530.4	3.3	26.8	560.5
Montgomery	1,014.2	7.2	51.3	1,072.7
Philadelphia	4,736.2	58.3	239.7	5,034.3
Philadelphia & The Countryside	7,518.1	77.5	380.5	7,976.1

Philadelphia & The Countryside – Industry Impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2010					
Bucks	673.2	8,389	223.8	46.3	44.5
Chester	646.7	6,823	207.5	43.1	41.7
Delaware	564.5	6,697	217.7	41.2	41.5
Montgomery	1,070.8	12,159	383.5	76.0	74.6
Philadelphia	5,044.0	32,221	1,491.0	351.8	307.3
Philadelphia & The Countryside	7,999.1	66,288.7	2,523.4	558.3	509.6
Percent Change	6.4%	-0.3%	4.2%	5.2%	5.0%
2009					
Bucks	629.2	8,482	216.1	44.0	42.4
Chester	608.2	6,983	208.9	41.0	39.7
Delaware	530.4	6,701	212.6	39.2	39.5
Montgomery	1,014.2	12,380	397.1	72.3	71.1
Philadelphia	4,736.2	31,929	1,387.4	334.3	292.6
Philadelphia & The Countryside	7,518.1	66,474.3	2,422.2	530.7	485.3

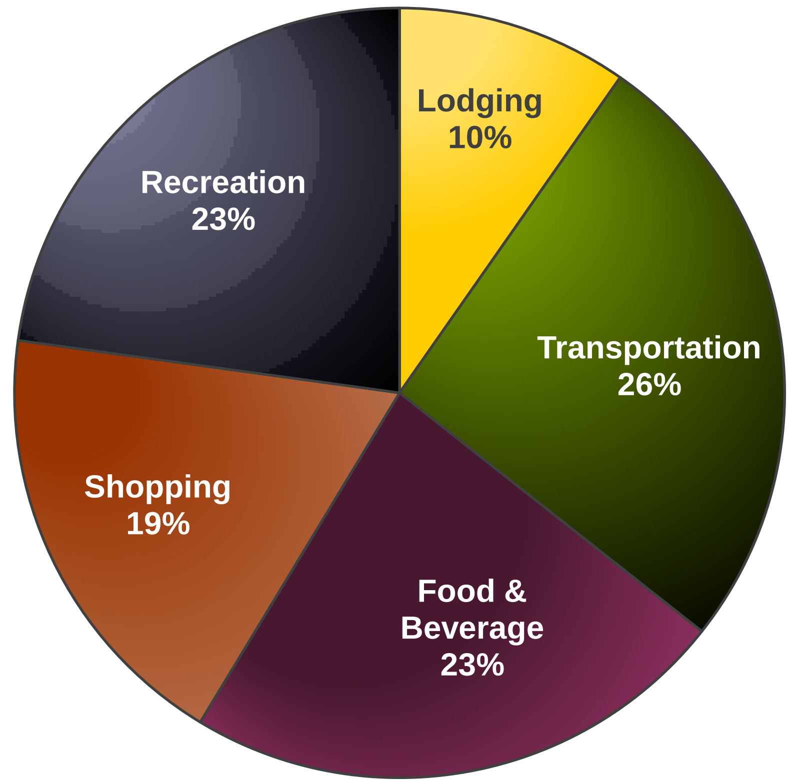
Philadelphia & The Countryside – Economy Impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2010					
Bucks	708.8	14,722	520.7	81.3	89.9
Chester	680.3	11,865	457.6	76.1	84.2
Delaware	593.8	12,044	488.1	73.1	83.9
Montgomery	1,127.1	21,045	832.2	134.0	150.8
Philadelphia	5,334.8	52,005	2,764.6	599.0	620.2
Philadelphia & The Countryside	8,444.9	111,681.4	5,063.2	963.5	1,029.1
Percent Change	5.9%	-0.2%	2.9%	5.3%	5.0%
2009					
Bucks	665.7	14,833	507.9	77.2	85.6
Chester	643.0	12,063	459.6	72.3	80.2
Delaware	560.5	12,042	479.9	69.5	80.0
Montgomery	1,072.7	21,319	853.4	127.5	143.6
Philadelphia	5,034.3	51,641	2,619.2	568.7	590.6
Philadelphia & The Countryside	7,976.1	111,899.0	4,920.0	915.2	980.0

Lehigh Valley

- The Lehigh Valley region is comprised the following counties: Lehigh and Northampton.
- Visitors spent $1.5 billion in the region in 2010.
- With a strong day-trip market and regional attractions, the Lehigh Valley has the highest share of recreation spending among Pennsylvania's tourism regions.

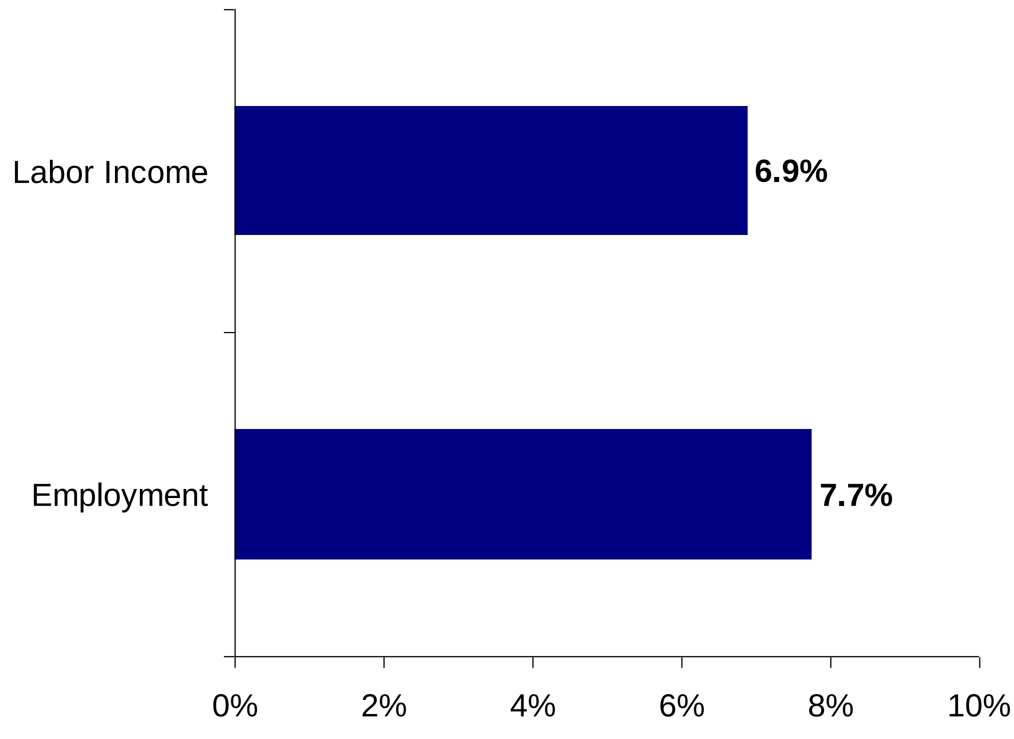
Lehigh Valley Region Spending by Category



Lehigh Valley

- Spending growth in 2010 measured 9.4%.
- The chart shows the travel economy (including indirect and induced impacts) share of the total region economy.
- Travel supported 7.7% of employment in the region.

Tourism Share of Regional Economy



Lehigh Valley – Timeline

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

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

Lehigh Valley – Visitor Spending

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2010						
Lehigh	91.3	221.9	186.3	184.1	241.8	925.4
Northampton	56.7	127.4	95.9	163.3	152.8	596.1
Lehigh Valley	148.0	349.3	282.2	347.3	394.6	1,521.4
Percent Change	6.0%	6.0%	7.0%	17.7%	8.9%	9.4%
2009						
Lehigh	88.5	212.0	174.4	171.4	225.9	872.1
Northampton	51.1	117.6	89.5	123.7	136.4	518.3
Lehigh Valley	139.6	329.6	263.9	295.1	362.3	1,390.4

Lehigh Valley – TSA

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2010				
Lehigh	925.4	5.3	42.7	973.4
Northampton	596.1	3.5	27.5	627.0
Lehigh Valley	1,521.4	8.8	70.2	1,600.4
Percent Change	9.4%	-2.1%	-0.2%	8.9%
2009				
Lehigh	872.1	5.6	44.1	921.9
Northampton	518.3	3.3	26.2	547.8
Lehigh Valley	1,390.4	9.0	70.4	1,469.8

Lehigh Valley – Industry Impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2010					
Lehigh	925.4	7,555	193.9	51.2	45.2
Northampton	596.1	5,448	149.3	35.5	32.5
Lehigh Valley	1,521.4	13,002.5	343.2	86.7	77.7
Percent Change	9.4%	1.5%	6.5%	5.8%	5.1%
2009					
Lehigh	872.1	7,732	192.6	48.4	43.0
Northampton	518.3	5,074	129.6	33.5	31.0
Lehigh Valley	1,390.4	12,806.4	322.3	81.9	74.0

Lehigh Valley – Economy Impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2010					
Lehigh	973.4	11,952	399.9	89.9	91.0
Northampton	627.0	8,780	310.0	62.5	65.6
Lehigh Valley	1,600.4	20,731.4	709.9	152.4	156.6
Percent Change	8.9%	1.2%	4.6%	5.8%	5.0%
2009					
Lehigh	921.9	12,181	398.7	85.0	86.6
Northampton	547.8	8,306	280.0	59.0	62.5
Lehigh Valley	1,469.8	20,487.2	678.8	144.0	149.1

Methodology and Background

TOURISM ECONOMICS

AN OXFORD ECONOMICS COMPANY

Methodology and data sources

- Domestic visitor expenditure estimates are provided by Longwoods International's representative survey of US travelers. These are broken out by sectors (lodging, transportation at the destination, food & beverage, retail, and recreation), by purpose (business and leisure), and by length of stay (day and overnight).
- Tourism Economics (TE) then adjusts these levels of spending based on a range of known measures of travel activity:
  - Overseas visitor spending (source: US Office of Travel and Tourism Industries, 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: US Bureau of Economic Analysis, US Bureau of Labor Statistics, US Census Bureau)

Methodology 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, US Department of Commerce. All employment rankings are based on US Bureau of Labor Statistics (Quarterly Census of Employment and Wages) data that covers 98 percent of US jobs at the county, MSA, state and national levels by industry.

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.

- For more information: info@tourismeconomics.com.

TOURISM ECONOMICS

AN OXFORD ECONOMICS COMPANY

For more information:

Adam Sacks, Managing Director

adam@tourismeconomics.com

Christopher Pike, Senior Economist

cpike@tourismeconomics.com