The Economic Impact of Travel and Tourism in Pennsylvania

Tourism Satellite Account
Calendar Year 2011

December 2012

TOURISM ECONOMICS
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State Overview

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Key themes for 2011

- The Pennsylvania travel and tourism economy accelerated in 2011, with travel industry sales (i.e., visitor spending) within the state up 8.9%.
  - Visitor volumes rose 1.4%, as the Commonwealth hosted 184.7 million domestic and international travelers in total in 2011.
  - Overnight visitation led the expansion with a 3.7% increase in visitor volume and hotel room demand rising 5.7% -- directly translating into higher spending amounts in total and for the lodging segment.
  - Per trip spending also increased, with particular strength in lodging and entertainment.
- Visitors spent $37.2 billion in Pennsylvania in 2011, up from $34.2 billion in 2010.
- This economic activity supported 461,249 jobs, both directly and indirectly, representing 6.4% of the state's total employment.

Key results

- The travel and tourism sector directly represented $14.0 billion of state GDP in 2011.
- Including indirect and induced impacts, travel in Pennsylvania generated $3.8 billion in state and local taxes and $3.9 billion in federal taxes in 2011.

On average, spending from 400 travelers supports one PA job.

One out of every 16 workers in Pennsylvania is supported by travel.

Why quantify the tourism economy

Challenges in measuring tourism economy

Explanation of Tourism Satellite Account (TSA)

Key definitions

Why quantify the tourism economy?

- By monitoring tourism's economic impact, policy makers can make informed decisions regarding the funding and prioritization of tourism development.

- Monitoring and quantifying tourism's economic impact also enables policymakers and those involved in the industry to carefully monitor the industry's successes and determine future needs.

- In order to do this, tourism must be measured in the same categories as other economic sectors – i.e., tax generation, employment, wages, and gross domestic product.

What is this a challenge?

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

Benefits of 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.

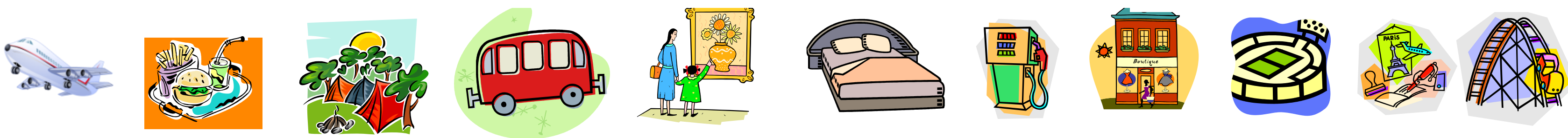
Key definitions

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.

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**.

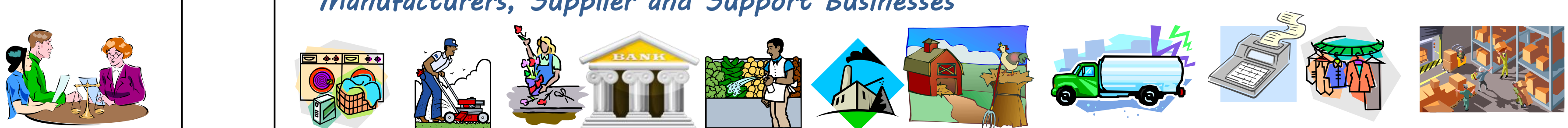
Businesses Catering to the Traveling Public



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**.

Illustrating the concepts

Travel & Tourism Industry

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

Travel & Tourism Economy

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

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

Detailed State Results

Total US & International Traveler Spending

Trends

Travel Segments

Spending Categories

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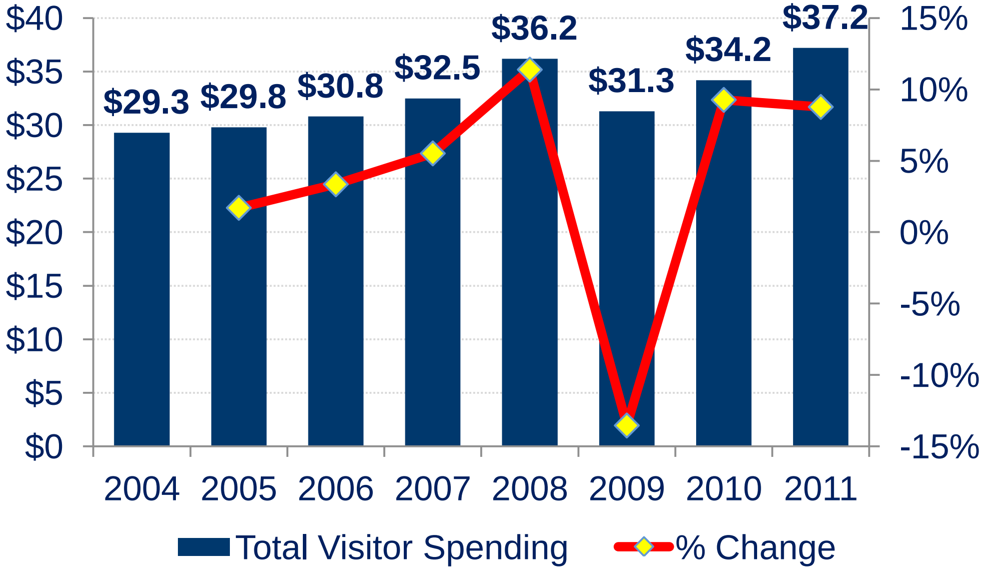
Key trends in 2011

- Tourism is an integral component of the Pennsylvania economy.
- Pennsylvania tourism industry sales rose 8.9% to $37.2 billion in 2011, just below the 9.2% increase in 2010. Spending increases were highest in the transportation and lodging sectors with the continued strength in the growth of the overnight segment.
- The total impact of Pennsylvania's travel and tourism industry was an estimated $39.1 billion when capital investment, government spending, and personal consumption expenditures related to tourism are added to visitor spending.
- Pennsylvania's tourism economy supported 461,250 jobs in total, representing 6.4% of total employment compared to 6.3% in 2010.
- Including indirect and induced impacts, tourism in Pennsylvania generated $3.8 billion in state and local taxes and $3.9 billion in federal taxes in 2011.
- The state's travel industry directly accounted for $14 billion of Pennsylvania's 2011 gross domestic product (GDP).

A new peak in visitor spending

- Spending by PA's leisure & business travelers rose 8.9% to $37.2 billion in 2011, finally surpassing 2008's record high – at least in nominal dollars.
- Once again, business day-trip travel registered the strongest percentage increase in spending in 2011 (+16%), while overnight leisure travel posted the strongest increase in dollar terms (+$1.6 billion).
- Several factors drove spending growth:
  - Visitation increases
  - Price increases, e.g., gasoline and hotels
  - Spending increases independent of price increases as travelers purchased more goods and services and/or more expensive items.

Traveler Spending in Pennsylvania
In billions of US dollars



Includes spending by both domestic and international travelers.

Source: Tourism Economics

A new peak in visitor spending

- The 8.9% growth rate in visitor spending in 2011 reflected increases in all categories, with the transportation, lodging, and recreation sectors posting the strongest increases.
- Both lodging demand and spending per available room grew, supporting the lodging sector's 9.5% growth in sales.
- The amount spent per visitor grew by over 5% in 2011 as the increase in demand enabled travel industry providers to increase their prices.

Traveler spending by visitor type, 2010 & 2011

- Overnight leisure travel is PA's dominant market segment in terms of the total dollar amount of spending, representing 51% of total visitor spending in 2011.

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

2011	Leisure	Business	Total
Overnight	$19.0	$5.1	$24.1
Day-Trip	$12.0	$1.1	$13.1
Total	$31.0	$6.2	$37.2
2010			
Overnight	$17.4	$4.6	$22.0
Day-Trip	$11.2	$0.9	$12.2
Total	$28.7	$5.5	$34.2
Percent Change			
Overnight	9.3%	11.4%	9.8%
Day-Trip	6.6%	16.1%	7.3%
Total	8.2%	12.2%	8.9%

Includes total spending by both domestic and international travelers.

2011 Traveler spending by market segment

- Leisure travelers accounted for 83% of PA's total visitor spending in 2011.
- Overnight visitors spent $24.1 billion in PA, or close to two-thirds of the total.
- International travelers from Canada and overseas markets spent a total of $3.9 billion in PA in 2011, or over 10% of the state's total visitor spending.

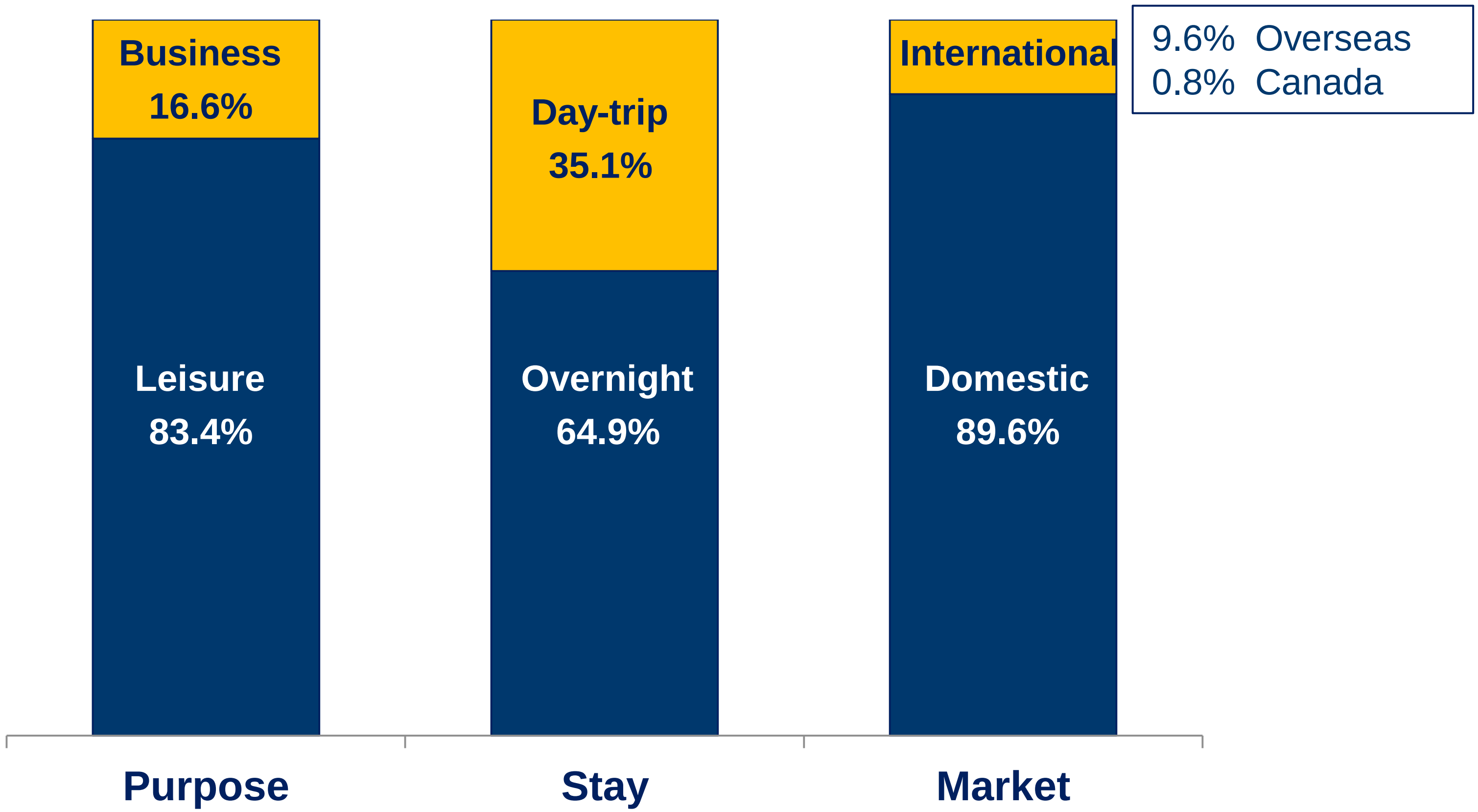
2011 Traveler Spending by Segment
(in billions of US dollars)

Purpose		Stay		Market	
Leisure	$31.0	Overnight	$24.1	US Domestic	$33.3
Business	$ 6.2	Day-trip	$13.1	Overseas	$ 3.6
				Canada	$ 0.3
Growth Rate					
Leisure	8.2%	Overnight	10.5%	US Domestic	8.8%
Business	12.2%	Day-trip	5.9%	Overseas	9.2%
				Canada	14.0%
Market Share					
Leisure	83.4%	Overnight	64.9%	US Domestic	89.6%
Business	16.6%	Day-trip	35.1%	Overseas	9.6%
				Canada	0.8%

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

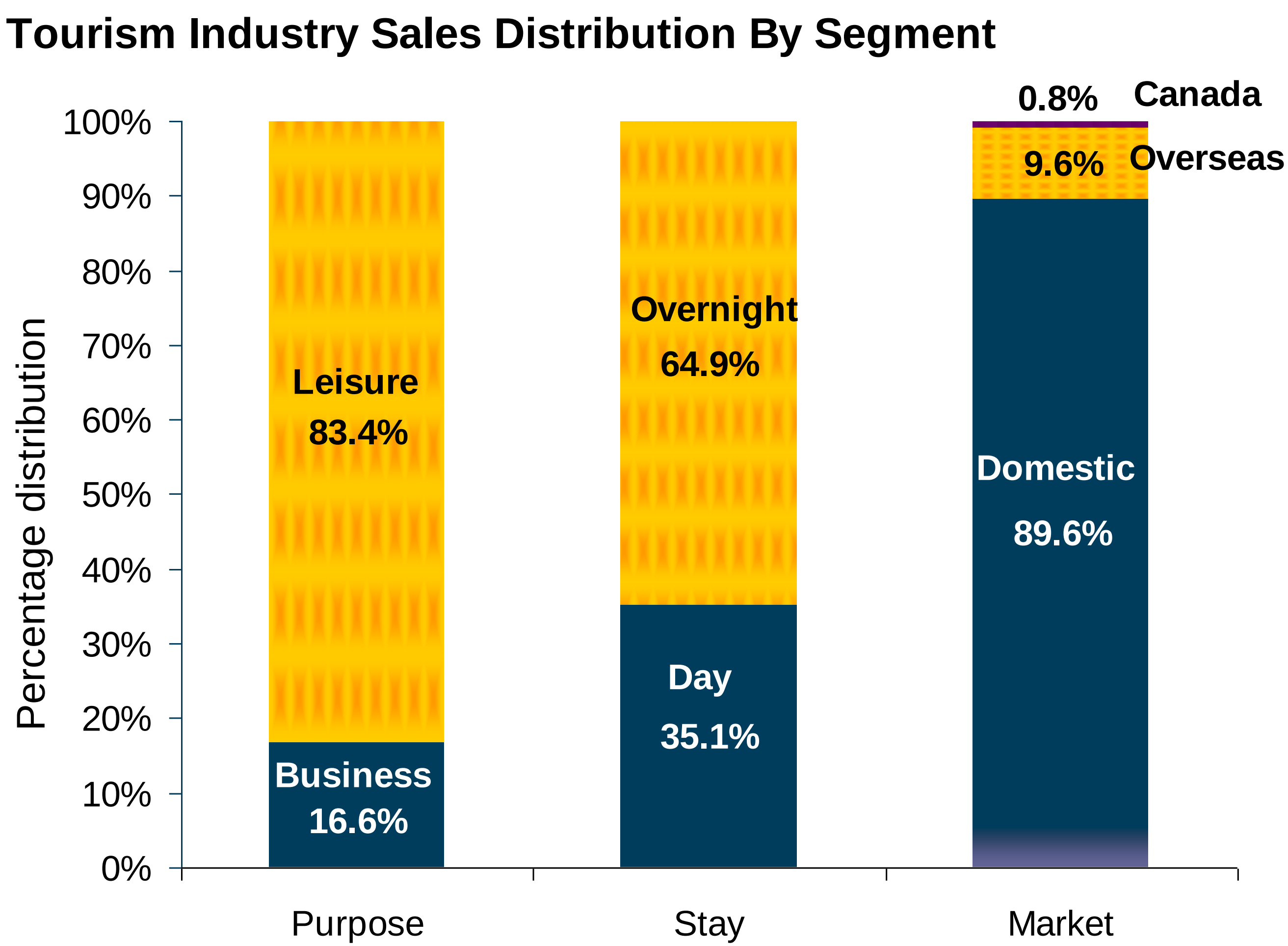
Traveler spending by market segment

- US domestic, leisure, and overnight travel remained the dominant segments for PA's travel and tourism industry in 2011, although international travel showed a slight gain in market share.



Includes spending by both domestic and international travelers.

Tourism industry sales by market segment



Source : Tourism Economics

Trends in traveler spending by spending category

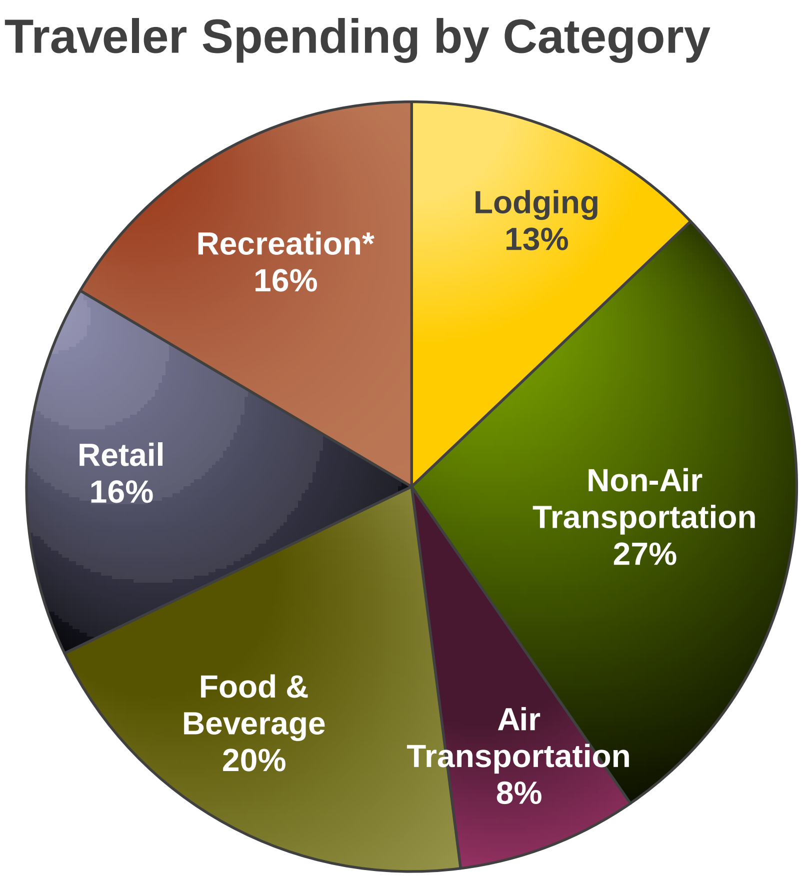
- Spending rose in all the major categories of traveler spending in 2011, with the strongest percentage increase in spending for non-air transportation, lodging, and recreation goods and services.
- PA's hotel room demand rose 9.5% in 2011, which drove much of the increase in total visitor spending on lodging.
- PA's spending per trip grew 5%, while the number of visitors rose 1.4% indicating the increase in total spending was due to more than just the increase in the number of travelers (i.e., travelers stayed longer and/or spent more on travel-related goods and services during their trip).

Traveler Spending by Category
(in billions of US dollars)

Spending Category	2008	2009	2010	2011	% Change
Lodging	$4.604	$4.046	$4.380	$4.798	9.5%
Non-Air Transportation	$9.212	$7.970	$8.803	$10.226	16.2%
Air Transportation	$3.180	$2.544	$2.681	$2.821	5.2%
Food & Beverage	$7.442	$6.602	$7.084	$7.404	4.5%
Retail	$6.079	$5.145	$5.551	$5.816	4.8%
Recreation	$5.637	$4.971	$5.666	$6.136	8.3%
TOTAL	**$36.154**	**$31.278**	**$34.165**	**$37.201**	**8.9%**

Includes spending by both domestic and international travelers.

2011 Traveler spending by spending category

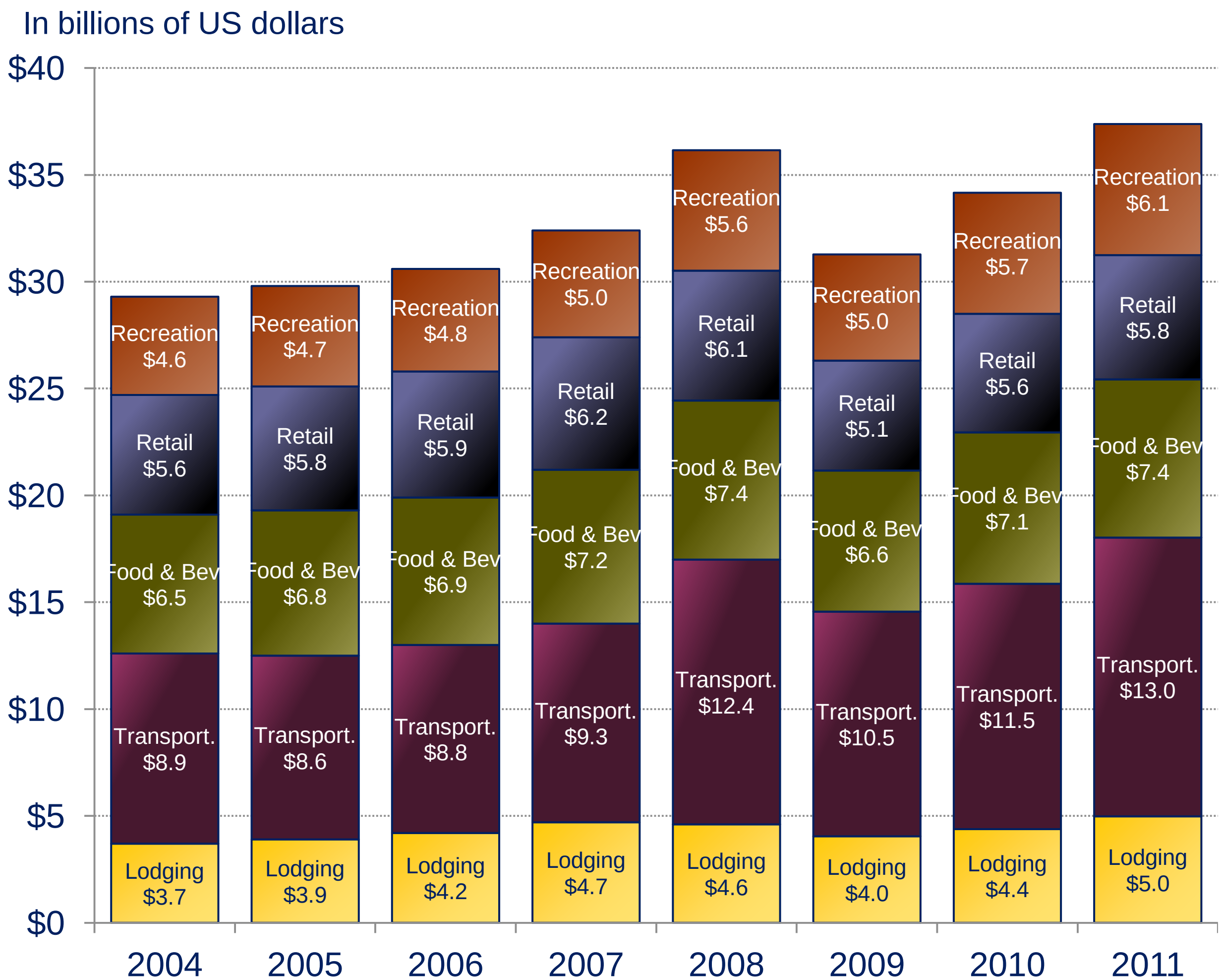


Recreation includes spending at attractions and on activities including both indoor (e.g., bowling) and outdoor (e.g., hiking).

Includes spending by both domestic and international travelers.

- Air and non-air transportation combined accounted for more than a third of traveler spending in PA in 2011.
- PA travelers spent a little over one-fifth of their total travel budgets on Food & Beverages in 2011 – about the same share as in the preceding three years.
- The share of traveler spending on recreational activities decreased slightly to 16.5% from 16.6% in 2010, but remaining well above the 15.6% in 2008 and 15.9% in 2009.

Traveler spending by spending category

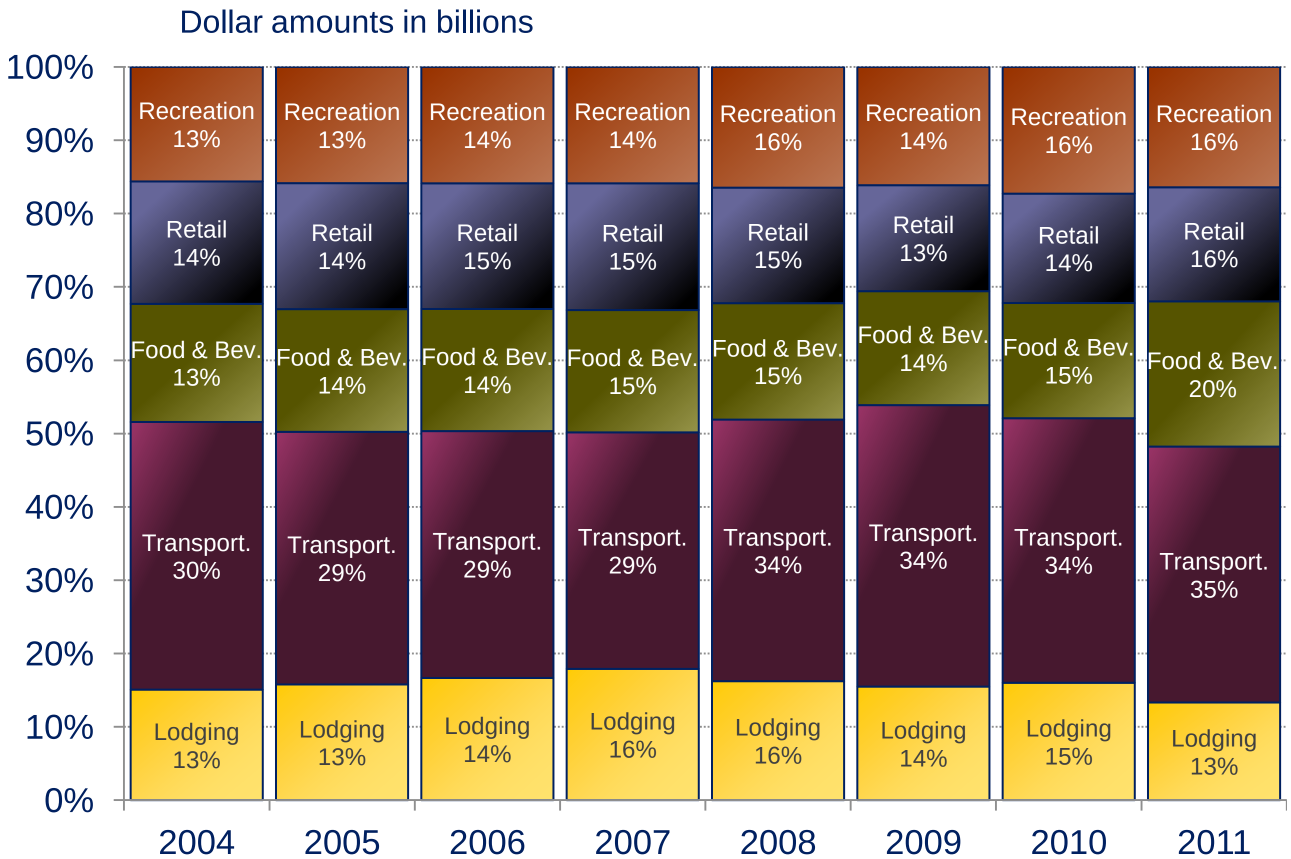


Includes spending by both domestic and international travelers.

- Traveler spending on lodging, transportation, and recreation in PA reached record high levels in 2011, with these three sectors posting the strongest increases in both percentage and dollar terms.
- Traveler spending on food & beverage and retail purchases, while up in 2011, remained constrained and below the record highs of 2008.

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

Percent of total spending by spending category



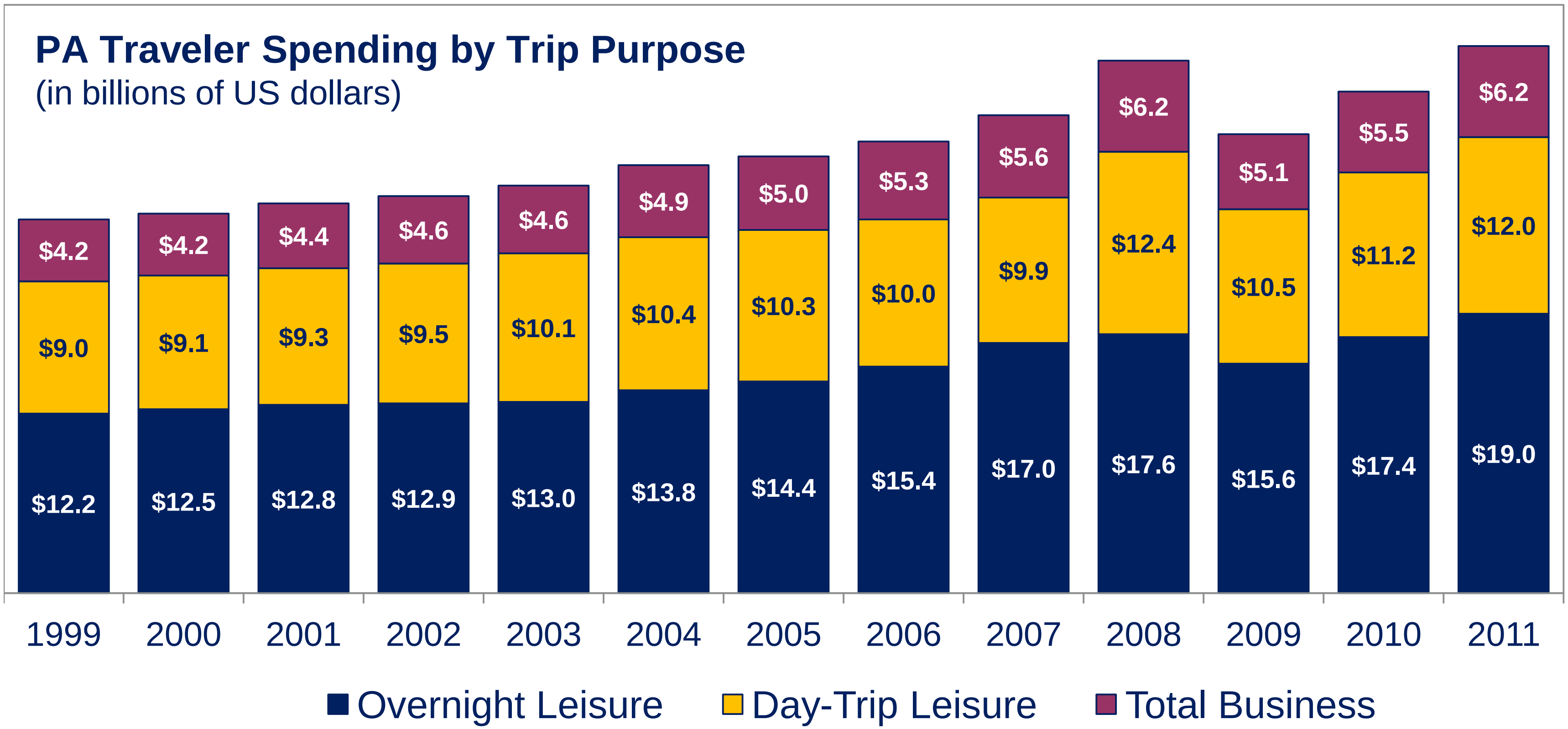
- As fuel prices have increased over the past several years, transportation has accounted for a greater share of total traveler spending.
- Increases in lodging prices have lagged other sectors in recent years despite strong demand.

Includes spending by both domestic and international travelers.

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

Total traveler spending by trip purpose

- Once again, overnight leisure travel drove much of the increase in total traveler spending in 2011, accounting for over 50% of the dollar increase.
- Business overnight and day-trip travel both posted strong percentage increases in 2011 – higher than either leisure sector, -- to equal 2008's record high total.

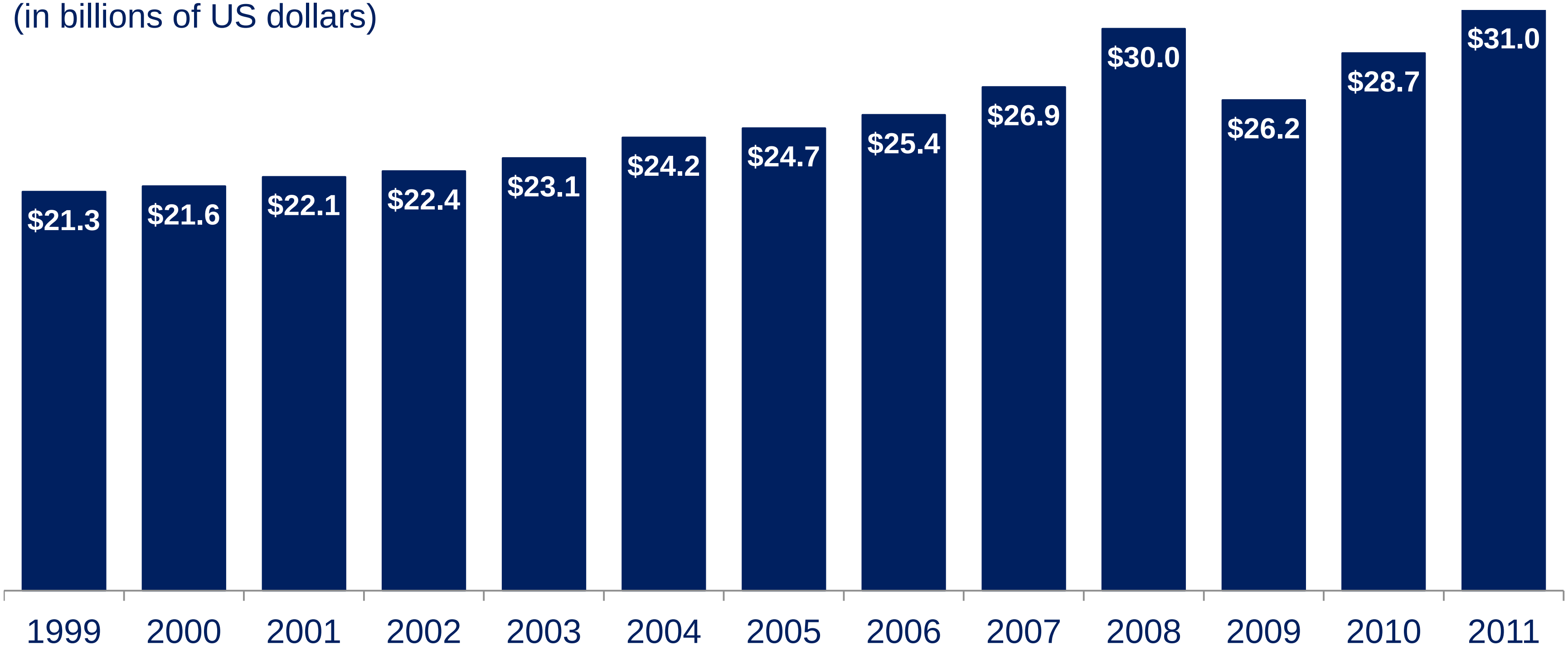


Includes spending by both US domestic and international travelers.

Total leisure traveler spending

- Total leisure traveler spending grew by $2.3 billion in 2011, or by 8.2%, to finally exceed the previous record high set in 2008.
- As noted above, both day-trip and overnight segments contributed to the increase as travelers spent more in all categories of traveler spending.

Total leisure traveler spending
(in billions of US dollars)



Includes spending of both US domestic and international travelers.

Overnight leisure traveler spending

- Spending by PA's overnight leisure travelers registered another strong increase in 2011, rising 9.3% – just slightly below 2010's growth rate of 11.4%.
- Total overnight leisure spending in 2011 was the highest level on record in nominal dollars.

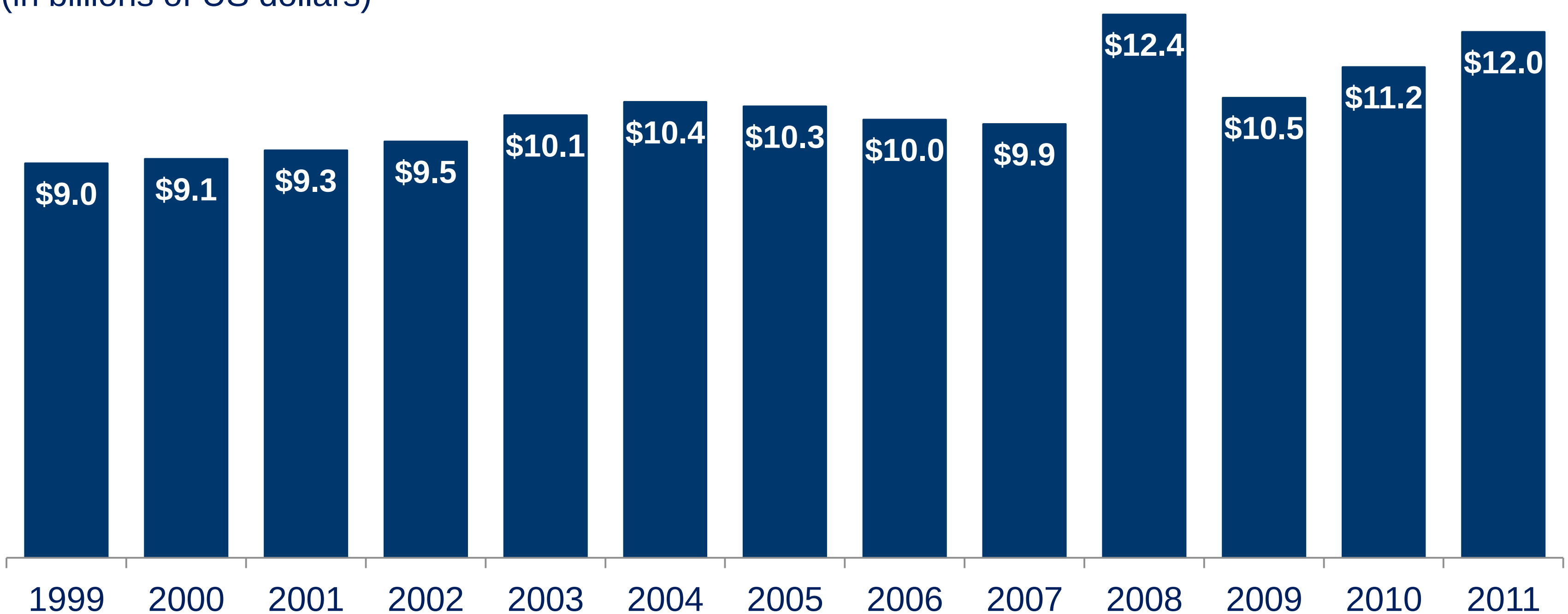
Total overnight leisure traveler spending
(in billions of US dollars)

Includes spending of both US domestic and international travelers.

Day-trip leisure traveler spending

- Total spending by PA's day-trip leisure travelers rose 6.6% in 2011 – the smallest increase of the four major travel segments (i.e., overnight leisure, overnight business, day-trip business, and day-trip leisure).
- Total day-trip leisure spending in 2011 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 Travel Market in Detail

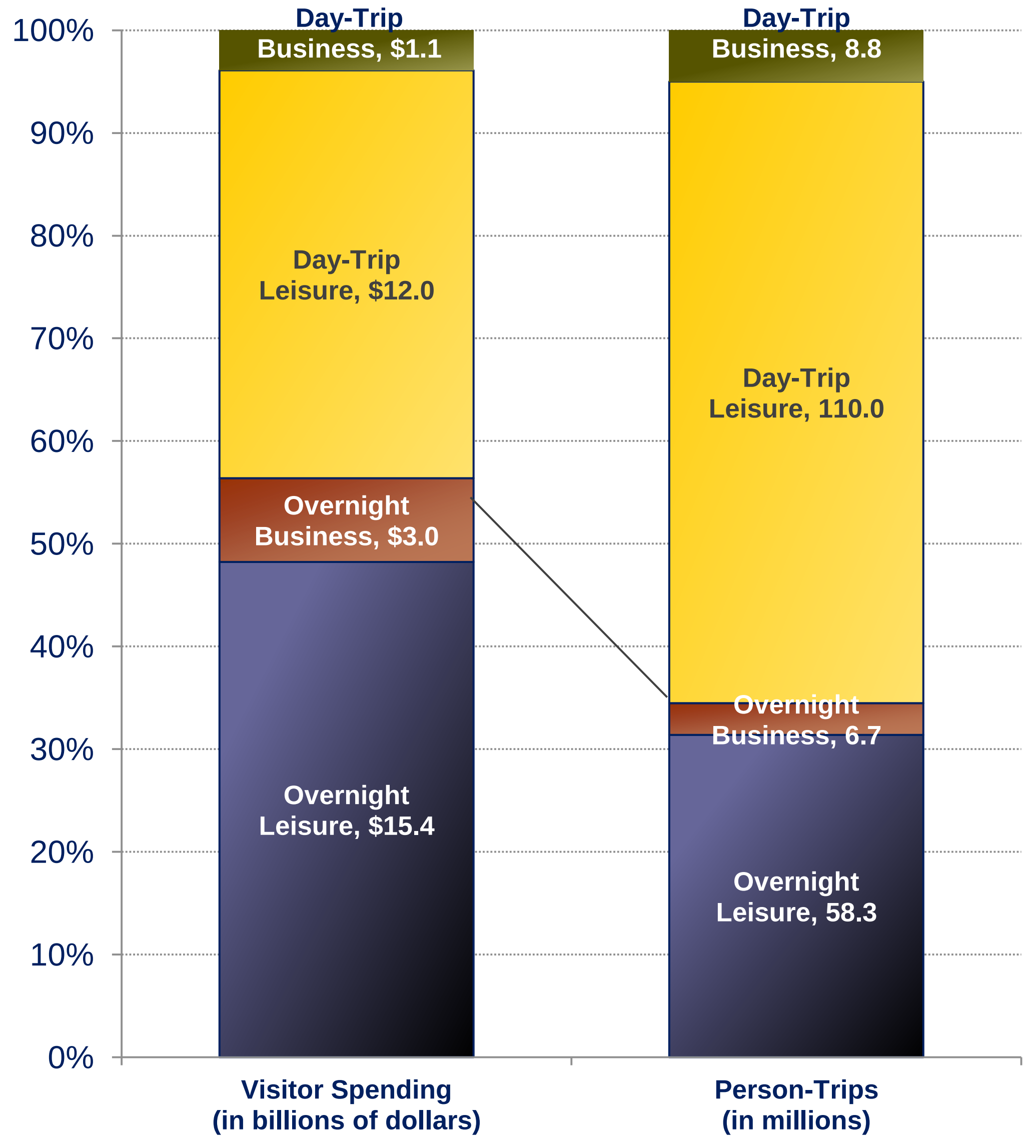
Domestic visits

- PA's total domestic visits (i.e., only US travelers) rose 1.4% to 181.7 million person-trips in 2011.
- Overnight visits rose 3.7% to 64.2 million person trips.
- Day trips were essentially flat, increasing only 0.2% to 117.5 million.
- Domestic in-state visitor spending rose 9.5% to $31 billion between 2010 and 2011 following the 9.6% gain in 2010. *(It is important to note the following charts do not include the portion of travel expenses incurred by visitors in getting to and from Pennsylvania, but is nonetheless attributable to PA, e.g., the portion of an airline visitor ticket accruing to PA airports, along with the PA portion of the ticket a traveler bought leaving the state. The following tables are based on traveler survey responses that do not capture this portion of transportation costs since the survey cannot break out where the airline ticket spending should apply.)*
- Per person-trip spending rose 8%.
- Per visitor spending increases were responsible for much of the gain in 2011's strong domestic spending increases, and primarily from the overnight segment.

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 2011, they accounted for a far higher share (48%) of PA's total domestic visitor spending – unchanged from 2010.



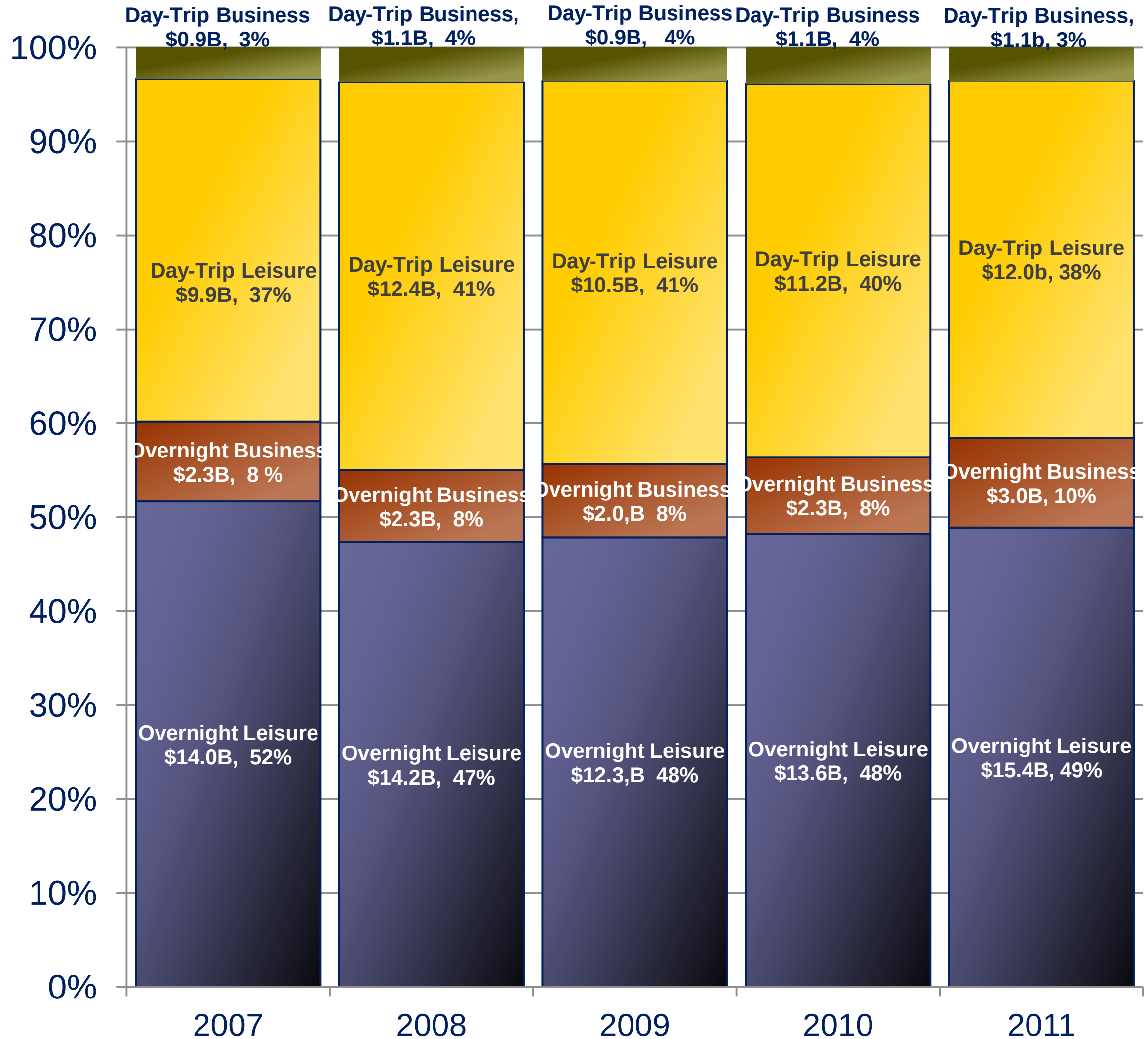
Source: Longwoods International

Domestic spending trends by trip type

- Overnight leisure travel accounted for nearly half of PA's total 2011 domestic traveler spending, with the share rising for the third straight year to 49%.
- Business overnight travel was responsible for $10 out of every $100 spent by domestic travelers in PA in 2011 – a strong gain in share from 2010.
- The share of domestic traveler spending by day-trip travelers fell in 2011 for both leisure and business travel.

Domestic traveler spending by trip type

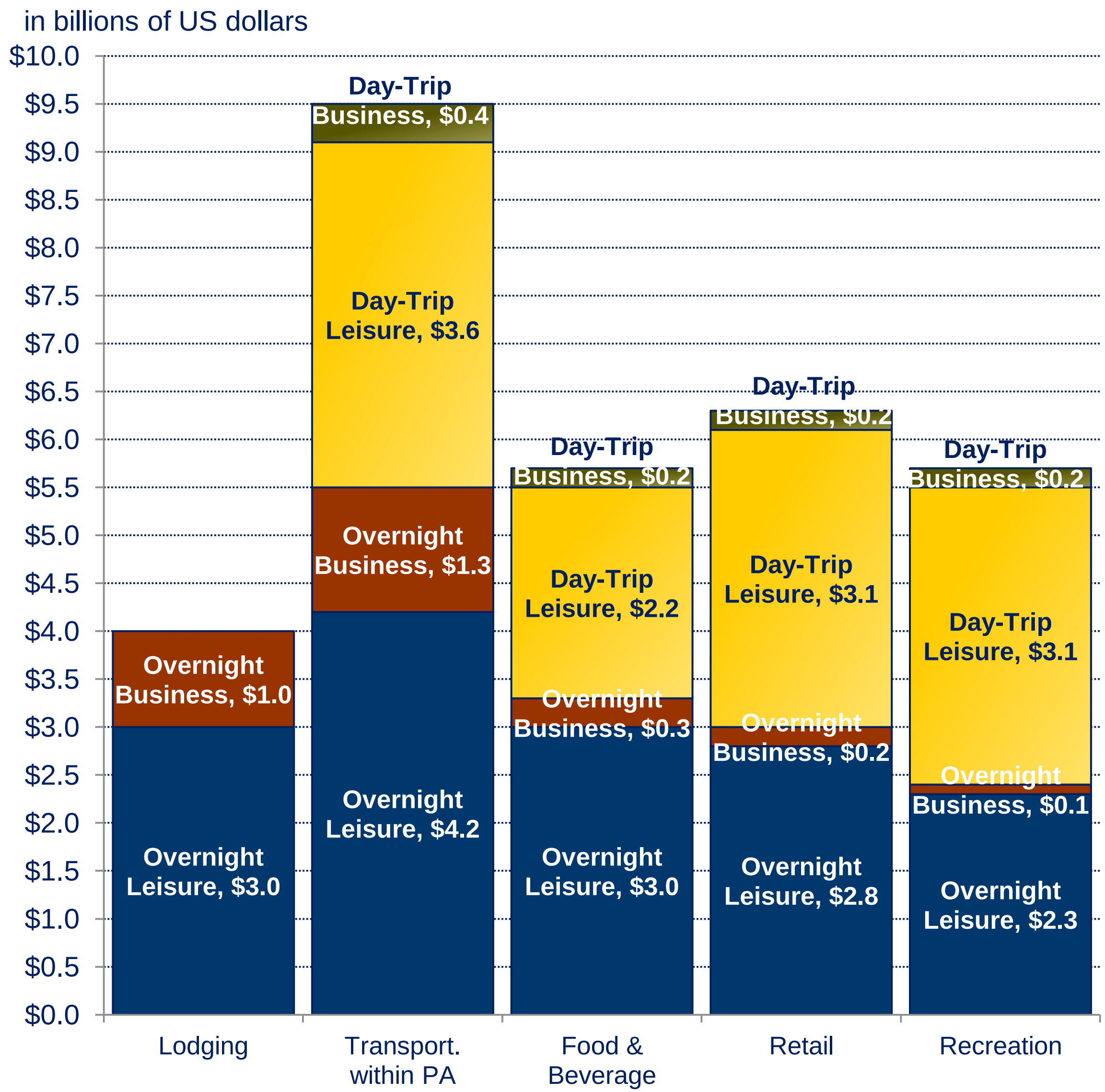
In billions of US dollars and as Percent of total spending



Source: Longwoods International

2011 domestic traveler spending by spending category and trip type

- Overnight leisure travelers accounted for 76% of PA's total domestic traveler 2011 spending on lodging – the same share as in 2010.
- Business overnight's 24% share of lodging spending was far higher than the segment's 10% share of overnight person-trips; over a third of the segment's total trip dollars was spent on lodging.
- Nearly 80% of business overnight traveler spending was on lodging and transportation – compared to under 50% for the leisure overnight segment.
- Without having to pay the cost of lodging, day-trip leisure travelers collectively spent more on retail and recreation than leisure travelers who stayed overnight.

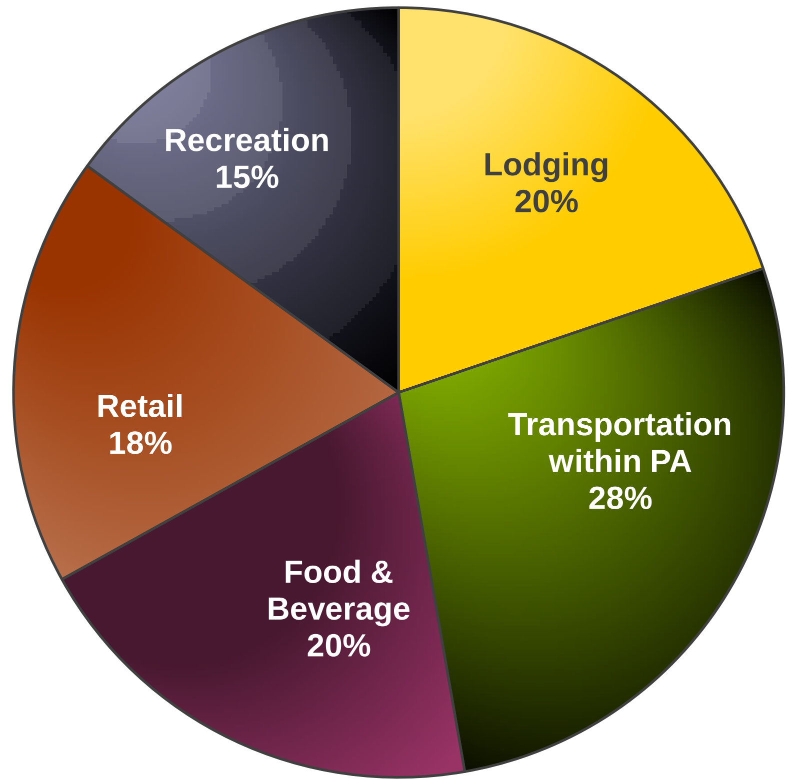


Source: Longwoods International

Overnight leisure traveler spending by category

- Pennsylvania hosted an estimated 58.3 million domestic overnight leisure travelers in 2011 (as measured in person-trips).
- These visitors spent $15.4 billion in PA – a 13% increase from 2010.
- Each visitor spent an estimated $263 per trip – an 8% increase from 2010.
- Travelers spent proportionally more on recreation and retail purchases than in 2010, while the share of spending on food & beverage purchases fell.

Domestic Overnight Leisure Traveler Spending by Category



Source: Longwoods International

Day-trip leisure traveler spending by category

- PA hosted an estimated 110 million day-trip leisure travelers (as measured in person-trips) in 2011.
- These visitors spent $12.0 billion in PA in 2011.
- Each visitor spent an estimated $108 per trip.
- Transportation took a bigger share of day-trip leisure travel budgets than in 2010, with travelers also spending proportionally more on retail purchases but less on food & beverage and recreation purchases.
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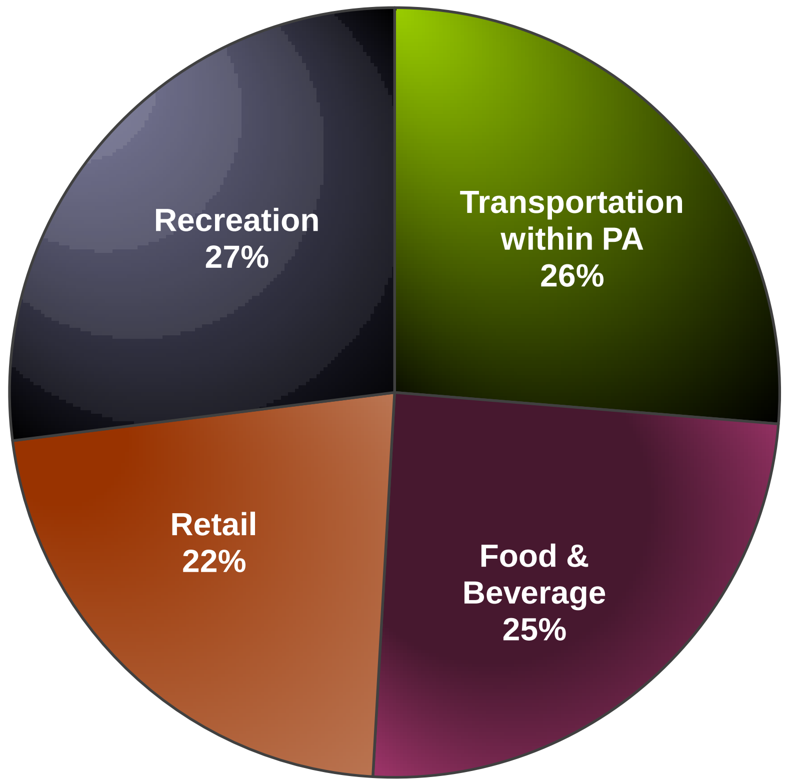
Day-Trip Leisure Traveler Spending by Category

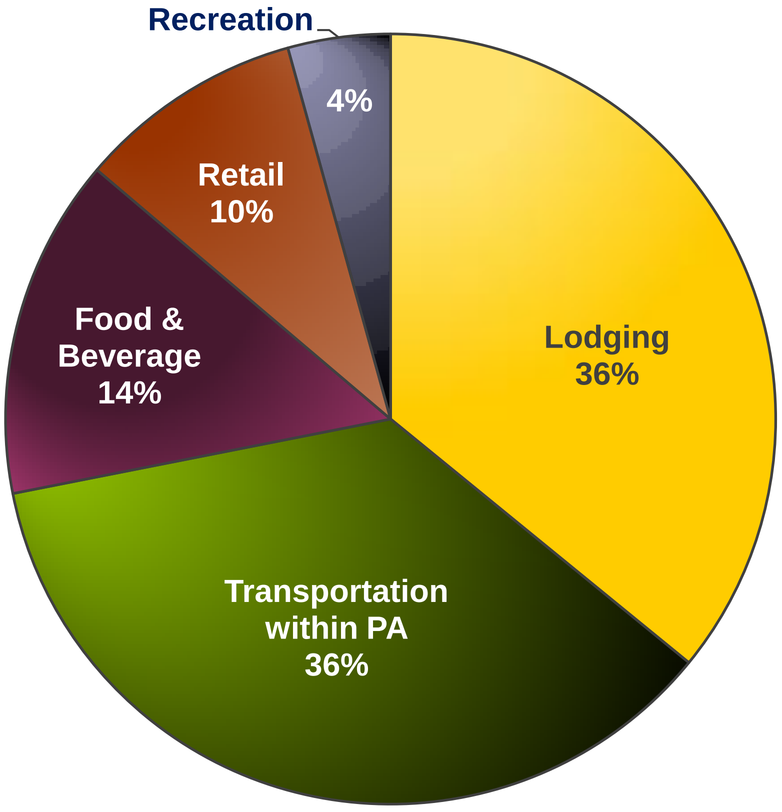


Source: Longwoods International

Overnight business traveler spending by category

- PA hosted an estimated 6.7 million overnight business travelers in 2011 (as measured in person-trips).
- These visitors spent $3.0 billion in total in Pennsylvania in 2011 – a 30% increase from 2010, largely due to the increase in the number of travelers and to a lesser extent the increase in per traveler spending.
- Each visitor spent an estimated $440 per trip – the highest of any trip type and 5% above 2010's level.

Domestic Overnight Business Traveler Spending by Category



Source: Longwoods International

Pennsylvania’s Total Travel and Tourism Economy

- ❖ Tourism Satellite Account Measures
- ❖ Translating Sales into Impact

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Tourism Satellite Account & total tourism demand

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

Tourism Satellite Account 2011 Spending (in billions of US dollars)						
	Domestic Traveler Spending	International Traveler Spending	Non-Visitor PCE	Government Support	Capital Investment (CAPEX)	Total*
2011	$33.3	$3.9	$0.2	$0.2	$1.5	$39.1
2010	$30.6	$3.5	$0.2	$0.2	$1.4	$35.9
% Change	8.8%	9.6%	0.0%	-0.7%	8.2%	8.8%

- 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

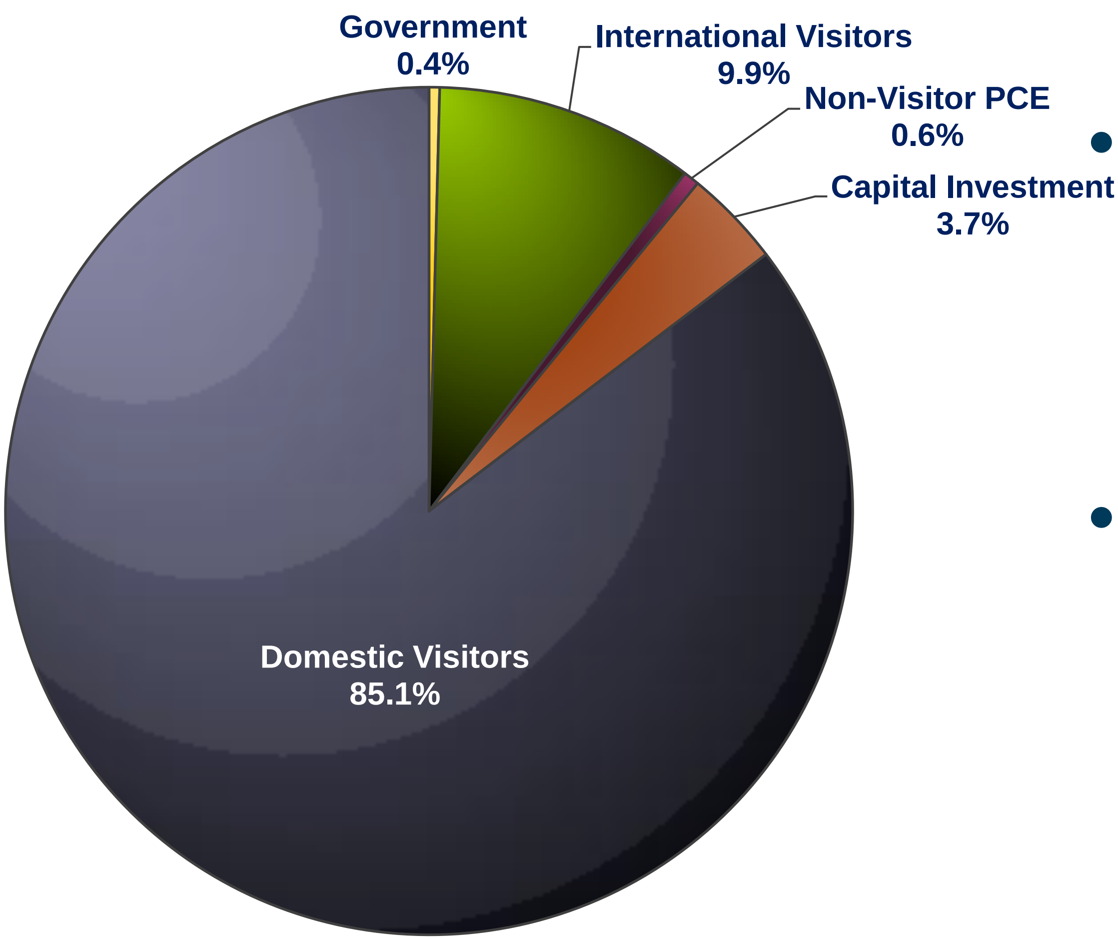
- The primary impact of travel and tourism is driven by sales made to travelers. This allows for apples-to-apples comparisons with other industries.
- The total economic impact of travel and tourism includes capital investment in support of travel and tourism, government spending and non-visitor private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

2011 PA Traveler Spending and Total Impact By Expenditure Category
(in millions of US dollars)

Industry	Total Visitor Spending	Total Economy Impact
Non-Air Transportation	$10,226.0	$10,226.0
Food and Beverage	$7,403.9	$7, 403.9
Recreation	$6,136.2	$6,136.2
Shopping	$5,815.6	$5,815.6
Lodging	$4,797.8	$4,797.8
Air Transportation	$2,821.1	$2,821.1
Investment	$0	$1,463.3
Non-Visitor Personal Consumption Exp.	$0	$237.1
Government	$0	$157.2
Total	$37,200.6	$39,058.2

Travel and tourism demand by source

Travel and Tourism Demand by Source



- As in 2010, domestic visitor markets comprised the majority (85%) of PA's travel and tourism sales in 2011.
- International visitor markets contributed close to 10% of PA's travel and tourism sales, up slightly (0.1 percentage point) from 2010.
- Capital investment in construction and machinery & equipment related to travel and tourism represented just under 4% of PA's 2011 travel and tourism economy sales.

Capital investment in travel and tourism

Travel and Tourism Capital Investment (in millions of US dollars)				
	2008	2009	2010	2011
Construction	$1,282	$619	$556	$654
Machinery & Equipment	$ 808	$727	$796	$809
Total	$2,089	$1,346	$1,353	$1,463
% Change		-35.6%	0.5%	8.2%

- Nearly $1.5 billion was invested in Pennsylvania by the travel and tourism industry in capital projects in 2011 – a substantial increase from 2010, but still well below the nearly $2.1 billion in capital investments made in travel and tourism-related capital projects in 2008.
- These investments included hotels/motels, recreational facilities, and related government capital outlays, but the majority of the 2011 increase was due to the construction of hotels and motels.

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.

DIRECT TOURISM SALES

Industry
Includes:
Visitor spending
Resident spending
Government spending

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

INDIRECT IMPACT

Supply chain impacts

INDUCED IMPACT

Spending of direct and indirect tourism employees

TOTAL IMPACT

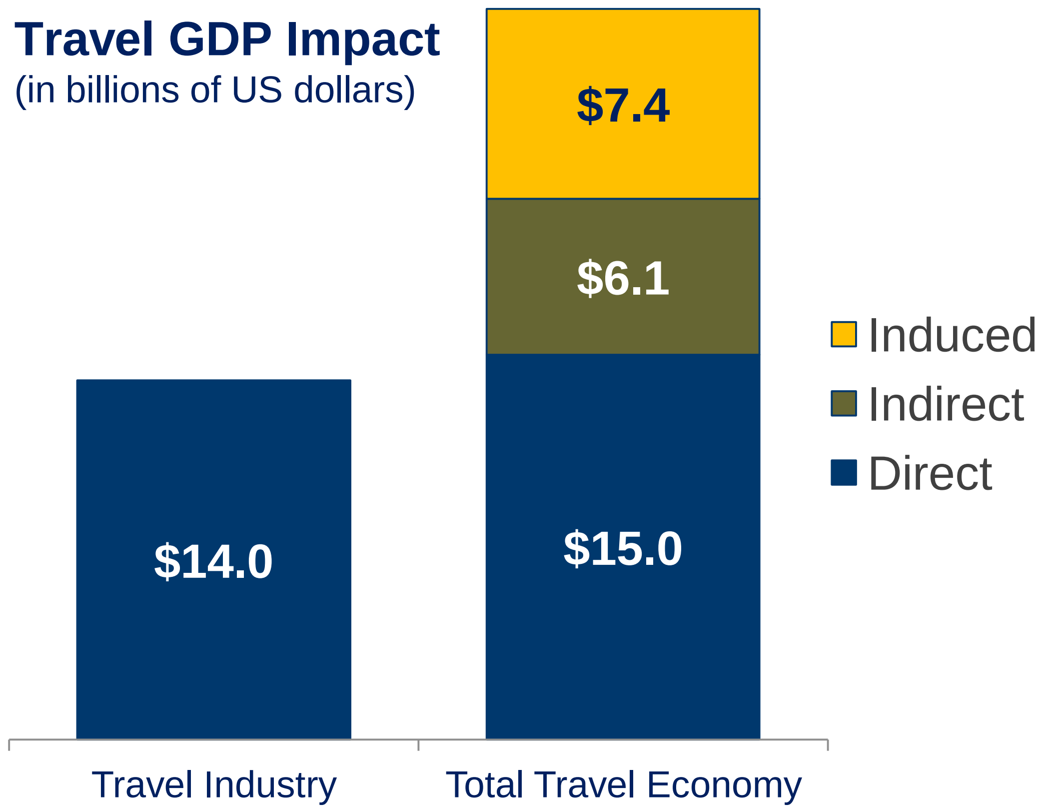
Sum of all impacts
- Sales
- Jobs
- Wages
- Taxes

IMPORT LEAKAGES

Import leakages reflect money that leaves the community, e.g., when 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 $14.0 billion in the state's gross domestic product (GDP) in 2011.
- The state's entire travel and tourism economy (including direct, indirect and induced impacts) generated $28.6 billion in GDP in 2011, or 4.9% of the state's economy.



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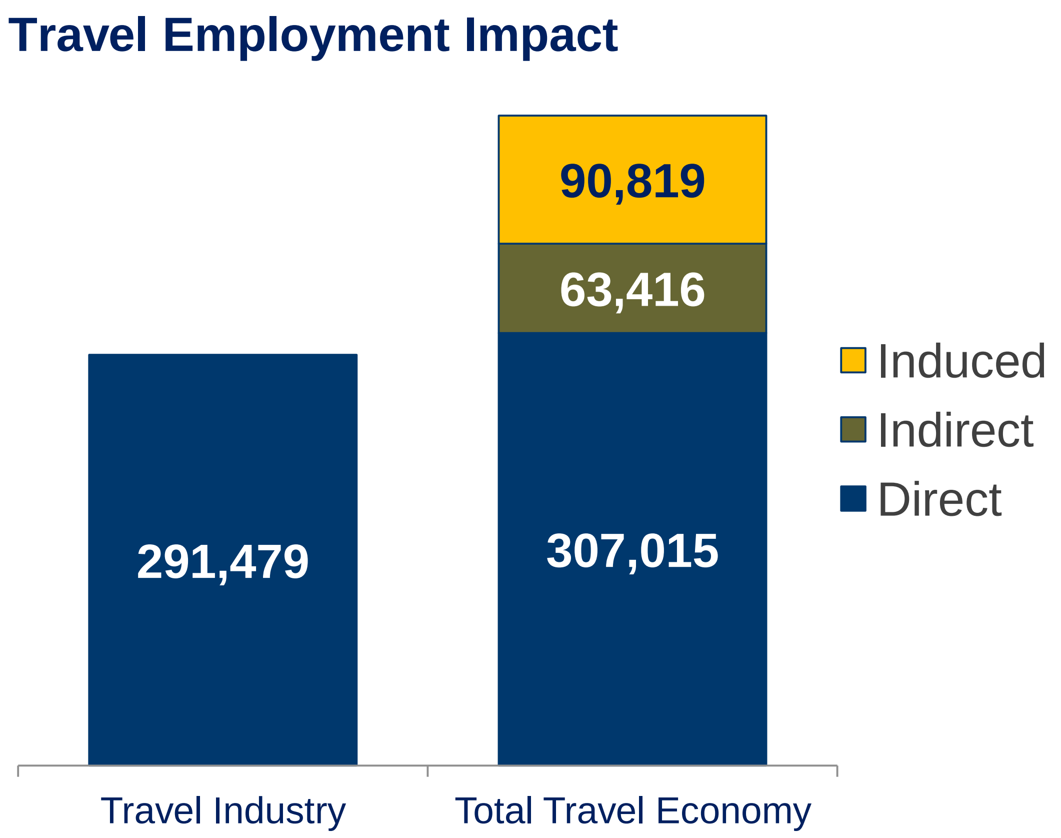
Travel and tourism employment impact summary

- Traveler spending directly supported 291,479 jobs in Pennsylvania in 2011.
- The travel and tourism economy, including direct, indirect and induced impacts, supported 461,249 jobs. This is 6.4% of all jobs in the state.



State Travel and Tourism Industry Impacts

(Direct Impact)

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Travel and tourism industry spending impact on GDP

2011 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	$1,078.3	8,959
Non-Air Transportation	$1,839.5	24,661
Retail Trade	$1,345.5	33,950
Gasoline Stations	$512.4	8,031
Communications	--	--
Fire, Insurance, and Real Estate (FIRE)	$936.4	4,058
Business Services	--	--
Education and Health Care	--	--
Recreation and Entertainment	$2,129.3	43,549
Lodging	$2,710.5	49,937
Food & Beverage	$3,176.5	111,066
Personal Services	$309.5	7,267
Government	--	--
Total	$14,037.9	291,479
Percent Change	4.5%	1.7%

- 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 $14.0 billion in 2011, or 2.43% of the state's total GDP – up from the industry's 2.25% contribution to PA GDP in 2010.

Travel and tourism industry spending impact on jobs

2011 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	$1,078.3	8,959
Non-Air Transportation	$1,839.5	24,661
Retail Trade	$1,345.5	33,950
Gasoline Stations	$512.4	8,031
Communications	--	--
Fire, Insurance, and Real Estate (FIRE)	$936.4	4,058
Business Services	--	--
Education and Health Care	--	--
Recreation and Entertainment	$2,129.3	43,549
Lodging	$2,710.5	49,937
Food & Beverage	$3,176.5	111,066
Personal Services	$309.5	7,267
Government	--	--
Total	$14,037.9	291,479
Percent Change	4.5%	1.7%

- Traveler spending supported 291,479 jobs, or 4.0% of all employment within Pennsylvania – the same share as in 2010.
- The food & beverage sector is a major beneficiary of traveler spending, which supported close to well over 111,000 jobs in this sector and contributed nearly $3.2 billion, or close to a quarter of the $14.0 billion in travel industry GDP.
- Non-air transportation had the largest percentage increase in jobs derived from traveler spending in 2011 (+4.0%), while the food & beverage had the largest increase in number of jobs.

Why spending and GDP differ

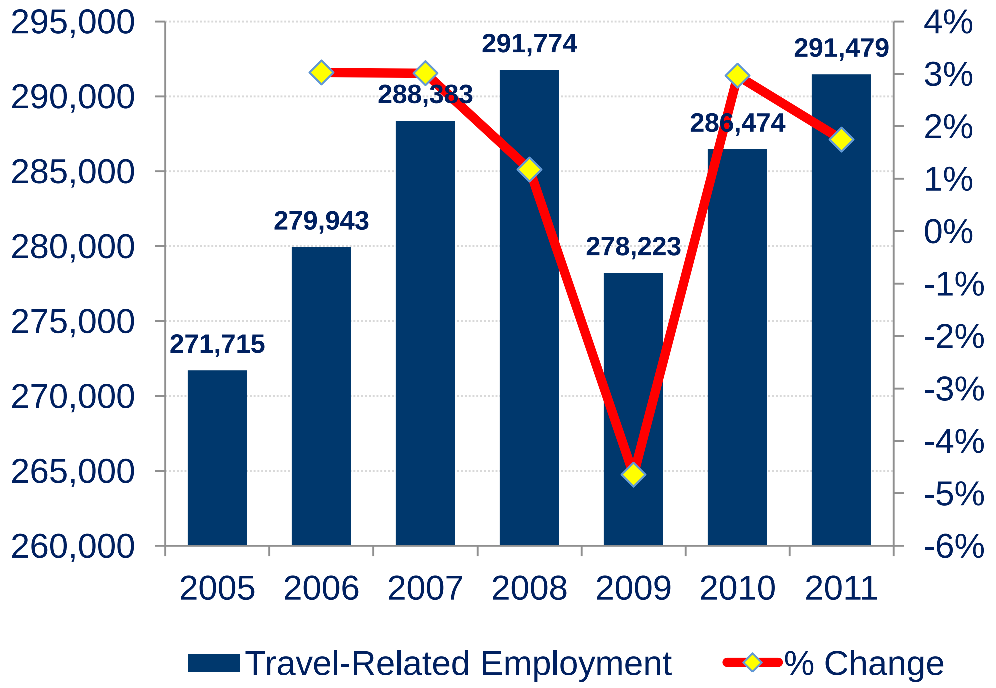
- Traveler spending in Pennsylvania equaled $37.2 billion in 2011, yet the industry's contribution to the state's Gross Domestic Product measured just $14.0 billion. Why are the figures so different?
- GDP (gross domestic product) is less than spending, or "sales" because GDP measures only the locally produced value of goods and services consumed by travelers.
  - This includes the local labor, capital depreciation, and the profits of travel-related companies that are based in Pennsylvania.
  - The costs of imported goods (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

Travel-related Employment							
	2005	2006	2007	2008	2009	2010	2011
Employment	271,715	279,943	288,383	291,774	278,223	286,474	291,479
% Change		3.0%	3.0%	1.2%	-4.6%	3.0%	1.7%

- With visitor spending recovering strongly in 2011 travel-related employment rose 1.7% in 2011 – outpacing the growth in PA's total job count.
- Nevertheless, the travel-related employment growth rate was well below the 8.9% increase in traveler spending.



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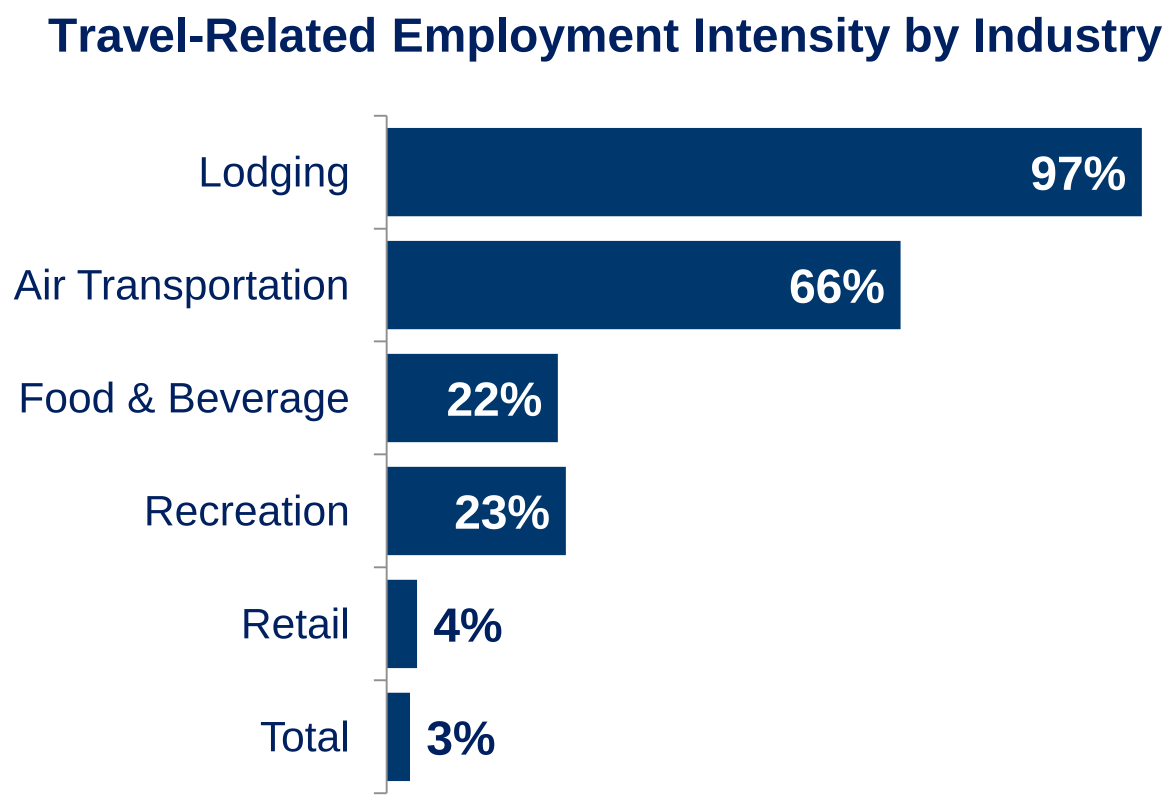
Travel industry employment shares

- Travel represents a significant portion of employment in the lodging, air transportation, food & beverage, and recreation sectors, and roughly 3% of the state total.



Ranking tourism-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 continued to rank as PA's 10th largest employer in 2011 with direct travel-related employment of 291,479 jobs.

Tourism-generated employment: 291,479

Employment Ranking - Private Sector		
State of Pennsylvania		
Rank	Industry	2011
1	Health care and social assistance	1,009,780
2	Retail trade	764,440
3	Manufacturing	590,713
4	Professional, scientific, and technical services	468,632
5	Accommodation and food services	452,764
6	Other services, except public administration	392,868
7	Finance and insurance	390,487
8	Administrative and waste management services	376,087
9	Construction	357,938
10	Educational services	278,953
11	Real estate and rental and leasing	265,242
12	Transportation and warehousing	262,455
13	Wholesale trade	247,963
14	Arts, entertainment, and recreation	158,236
15	Management of companies and enterprises	128,064

State Travel and Tourism Economy Impacts

(direct, indirect, and induced)

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Travel economy GDP – total impact by industry

- Pennsylvania's travel and tourism industry generated close to $28.6 billion in total impact to the state's Gross Domestic Product (GDP) in 2011.
- The following table shows the direct, indirect, and induced impact of travel and tourism on the GDP for the diverse industry sectors.

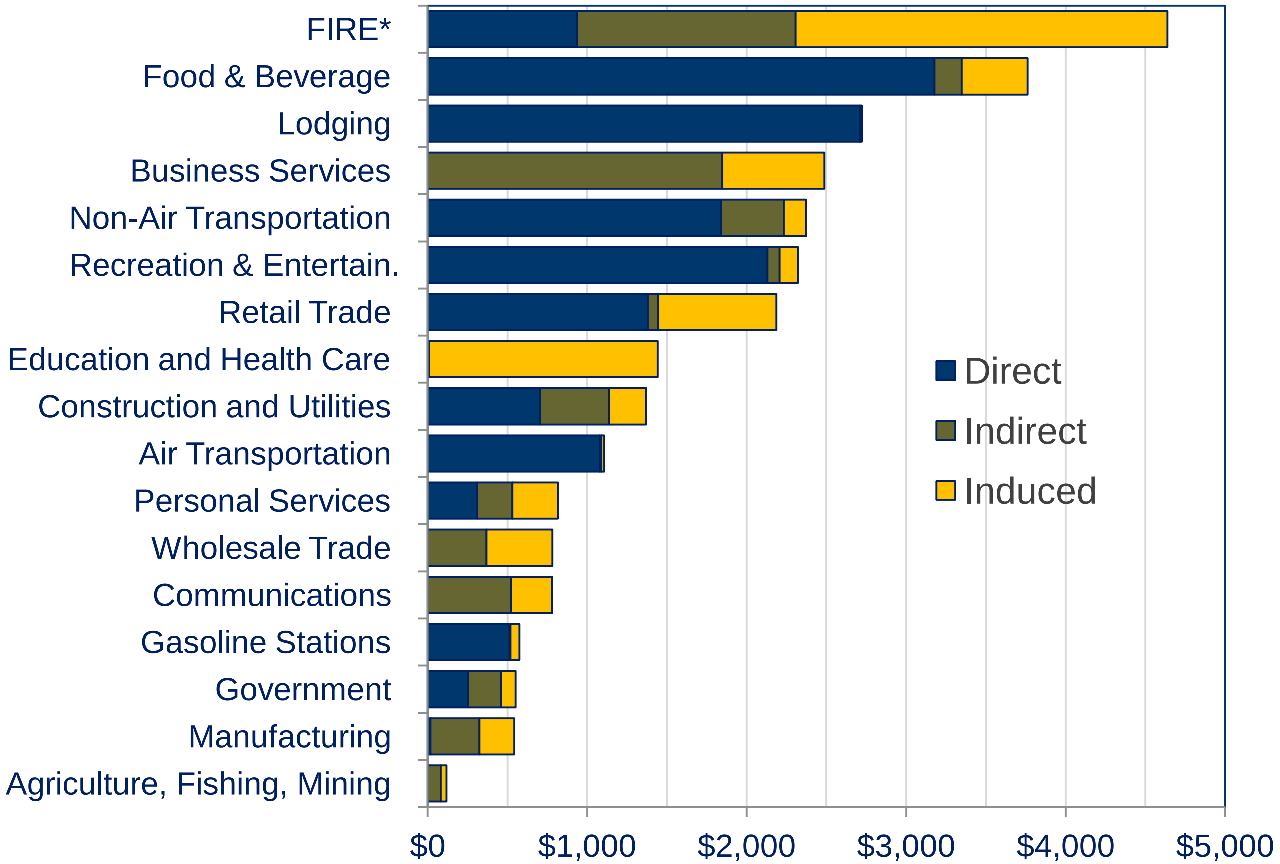
2011 PA Travel Economy GDP (*Value Added)*
(in millions of US dollars)

Industry	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	--	$82.1	$35.7	$117.8
Construction and Utilities	$703.8	432.1	233.5	1,369.4
Manufacturing	18.0	305.5	218.4	541.8
Wholesale Trade	--	369.0	412.5	781.4
Air Transportation	1,078.3	10.3	17.7	1,106.4
Non-Air Transportation	1,839.5	393.4	139.6	2,372.5
Retail Trade	1,379.6	66.0	740.9	2,186.4
Gasoline Stations	512.4	6.1	55.7	574.1
Communications	--	520.3	259.7	779.9
Fire, Insurance, and Real Estate (FIRE)	936.4	1,370.6	2,331.7	4,638.7
Business Services	--	1,846.1	640.6	2,486.7
Education and Health Care	--	9.7	1,432.9	1,442.6
Recreation and Entertainment	2,129.3	77.1	113.3	2,319.7
Lodging	2,710.5	5.1	5.9	2,721.5
Food & Beverage	3,176.5	171.3	413.7	3,761.5
Personal Services	309.5	220.7	286.4	816.7
Government	254.7	203.1	92.4	550.2
Total	$15,048.5	$6,088.4	$7,430.4	$28,567.3
Percent Change from 2010	4.6%	5.9%	4.1%	4.8%

Travel economy GDP – impacts by industry

- Including supply chain and income effects, travel and tourism benefits a broad spectrum of industries.
- Almost $5.0 billion of the finance, insurance, and real estate (FIRE) industry's total GDP in 2011 was generated by travel and tourism activity, with .

2011 Travel Economy GDP Impact by Industry
(in millions of US dollars)



* FIRE – Finance, Insurance, and Real Estate

TOURISM ECONOMICS

Travel economy employment – impacts by industry

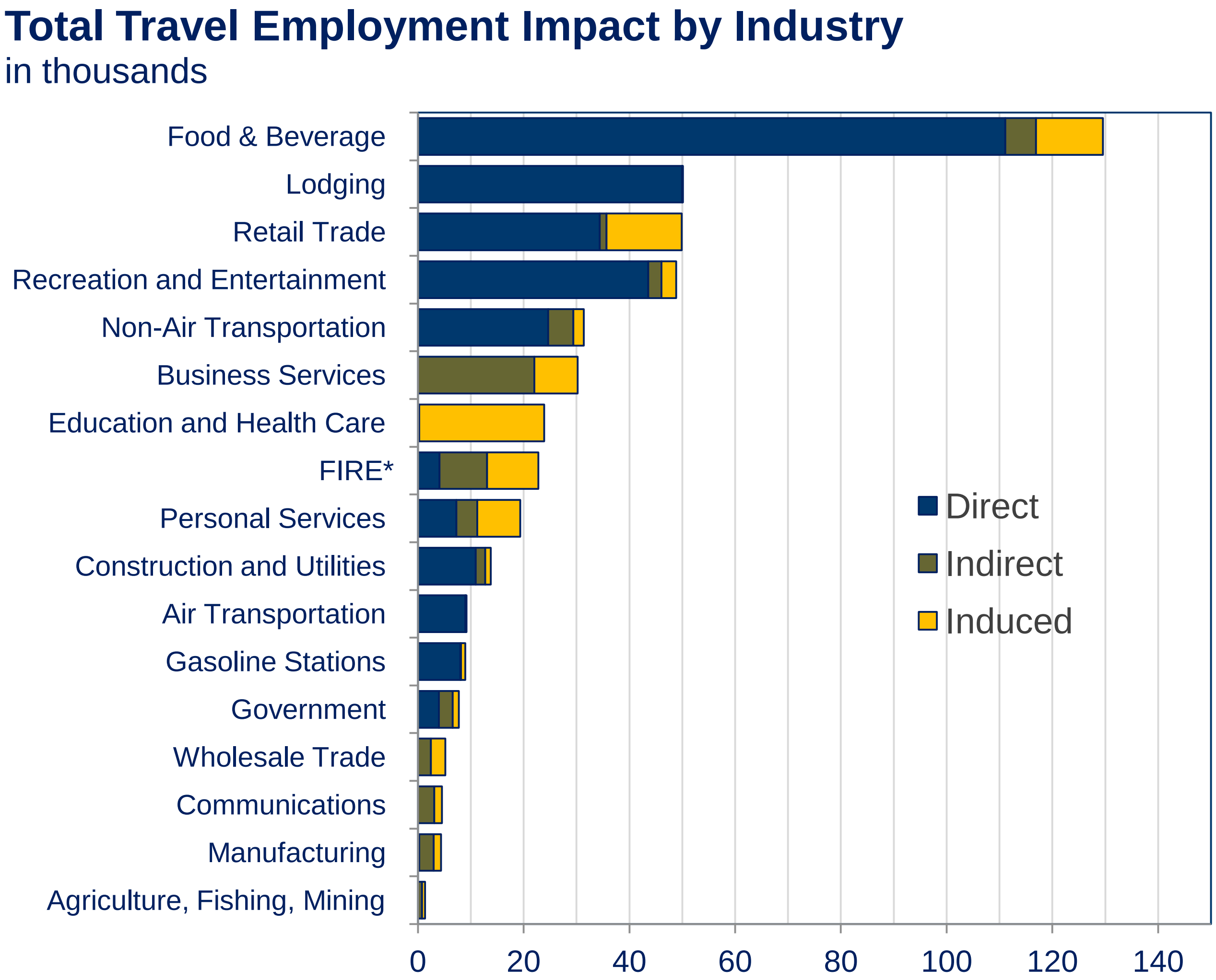
- Pennsylvania's travel and tourism industry supported 461,249 jobs, or 6.4% of PA's total employment in 2011.
- The total presented below reflects the broadest measurement of employment, i.e., includes businesses directly serving the traveling public and their support industries, as well as jobs supported by government spending, capital investment, and private consumption expenditures.

2011 PA Travel-Related Employment (*Value Added*)

Industry	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	--	767	616	1,384
Construction and Utilities	10,913	1,846	1,038	13,798
Manufacturing	248	2,714	1,430	4,392
Wholesale Trade	--	2,444	2,769	5,213
Air Transportation	8,959	87	146	9,191
Non-Air Transportation	24,661	4,757	1,939	31,358
Retail Trade	34,379	1,293	14,208	49,881
Gasoline Stations	8,031	92	831	8,954
Communications	--	3,110	1,461	4,570
Fire, Insurance, and Real Estate (FIRE)	4,058	9,017	9,720	22,796
Business Services	--	22,014	8,181	30,195
Education and Health Care	--	232	23,627	23,859
Recreation and Entertainment	43,549	2,539	2,777	48,866
Lodging	49,937	95	111	50,143
Food & Beverage	111,066	5,827	12,663	129,556
Personal Services	7,267	3,945	8,148	19,360
Government	3,945	2,637	1,152	7,734
Total	307,015	63,416	90,819	461,249
Percent Change from 2009	1.9%	2.4%	2.0%	2.0%

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 – impacts by industry

Traveler spending generated $17.3 billion in income for persons who were employed by businesses supported in some way by travel and tourism in 2011.

2011 PA Travel-Related Labor Income
(in millions of US dollars)

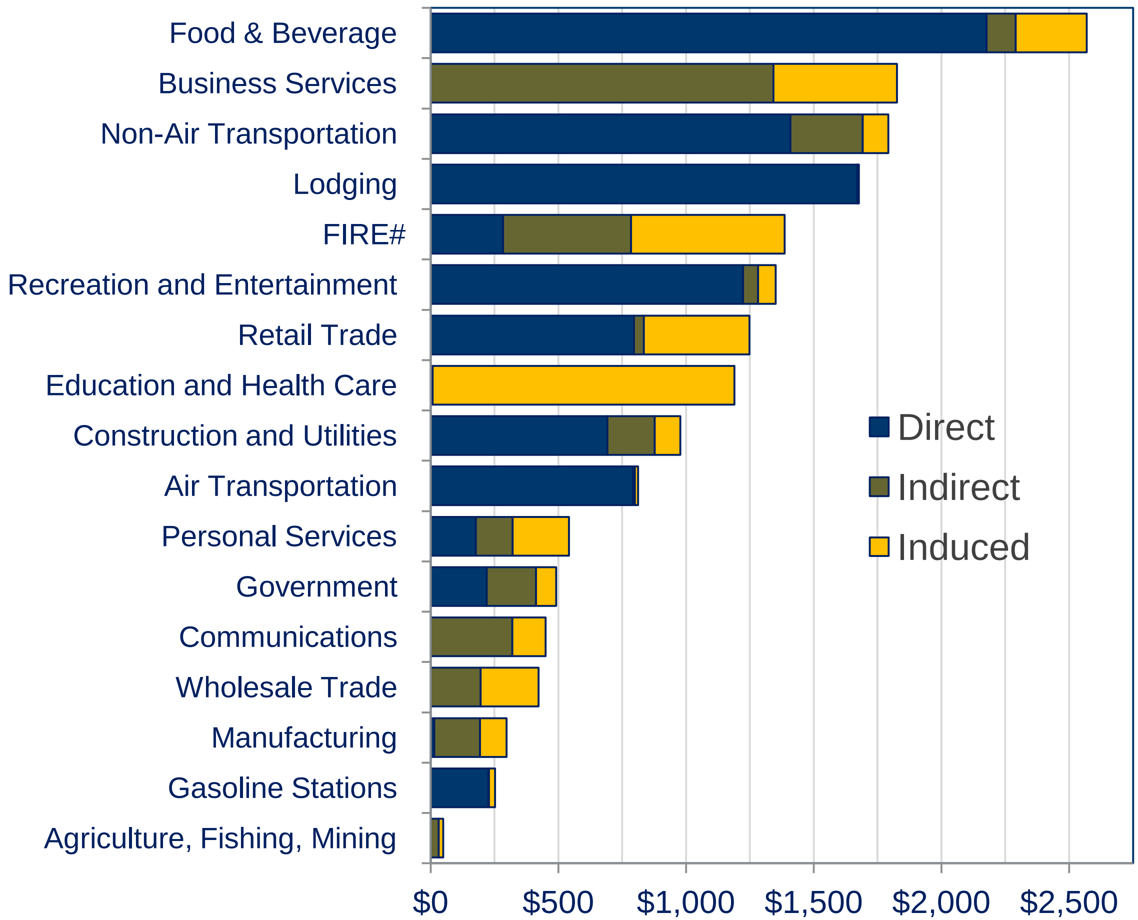
Industry	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	$--	$32.1	$16.5	$48.5
Construction and Utilities	691.6	185.7	100.0	977.3
Manufacturing	14.2	179.4	104.0	297.5
Wholesale Trade	--	195.4	226.6	422.0
Air Transportation	792.1	7.5	12.9	812.5
Non-Air Transportation	1,408.7	283.0	100.8	1,792.5
Retail Trade	796.5	37.7	414.3	1,248.5
Gasoline Stations	225.5	2.6	24.2	252.3
Communications	--	319.7	131.0	450.6
Fire, Insurance, and Real Estate (FIRE)	283.9	500.6	601.2	1,385.7
Business Services	--	1,342.5	483.8	1,826.3
Education and Health Care	--	7.9	1,181.2	1,189.1
Recreation and Entertainment	1,223.3	58.6	69.1	1,351.0
Lodging	1,671.1	2.8	3.5	1,677.4
Food & Beverage	2,176.2	114.9	277.6	2,568.7
Personal Services	176.4	145.1	219.8	541.4
Government	219.1	193.2	79.7	492.0
Total	$9,678.6	$3,608.7	$4,046.0	$17,333.3
Percent Change from 2009	5.9%	3.2%	3.6%	4.7%

Travel economy labor income – impact by industry

- Traveler spending generated $17.3 billion in labor income in 2011, 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	2011	% Change
Federal Taxes	**$3,505.1**	**$3,681.6**	**$3,856.4**	**4.7%**
Corporate	349.2	369.5	387.1	4.7%
Indirect Business	332.3	351.6	368.3	4.7%
Personal Income	1,035.3	1,085.5	1,137.0	4.7%
Social Security	1,788.3	1,875.0	1,964.0	4.7%
State and Local Taxes	**$3,378.1**	**$3,572.6**	**$3,798.4**	**6.3%**
Corporate	$ 214.7	$ 235.9	$250.5	6.2%
Personal Income	$ 325.1	$ 340.8	$357.0	4.7%
Sales	$1,199.7	$1,316.7	$1,438.6	9.3%
Hotel Occupancy	$ 111.8	$ 121.7	$133.1	9.4%
Property	$1,030.2	$1,032.3	$1,068.9	3.6%
Excise and Fees	$ 468.3	$ 495.6	$519.1	4.7%
State Unemployment	$ 28.3	$ 29.6	$31.1	4.7%
TOTAL	**$6,883.2**	**$7,254.3**	**$7,654.8**	**5.5%**

- Travelers were responsible for nearly $3.8 billion in state and local tax revenues and an additional $3.9 billion in federal taxes in 2011.
- Pennsylvania’s state and local governments would have to tax each PA household an additional $770 per year to replace the taxes generated by travel and tourism.

Pennsylvania's Tourism Regions

Economic Impact of Travel
By Region and County

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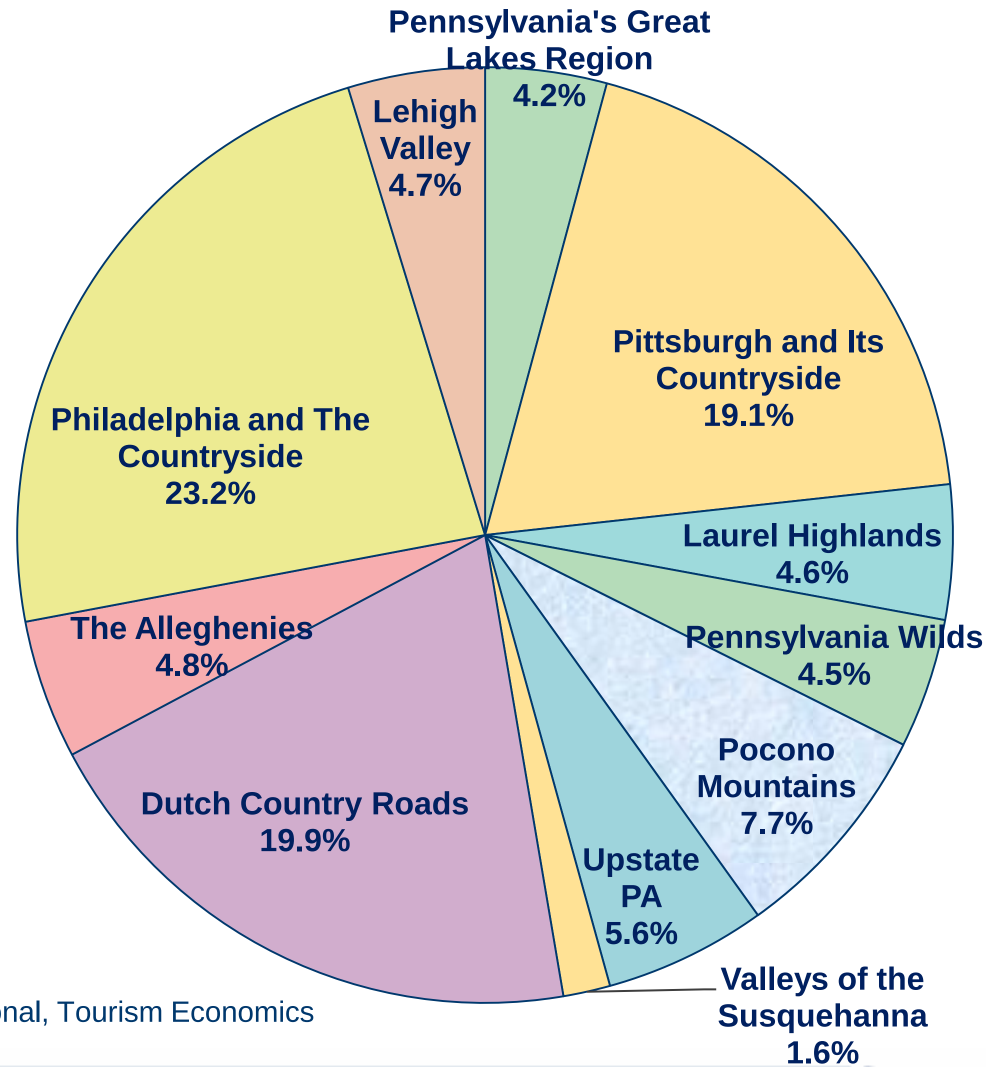
Pennsylvania Regions

Regional Spending Shares

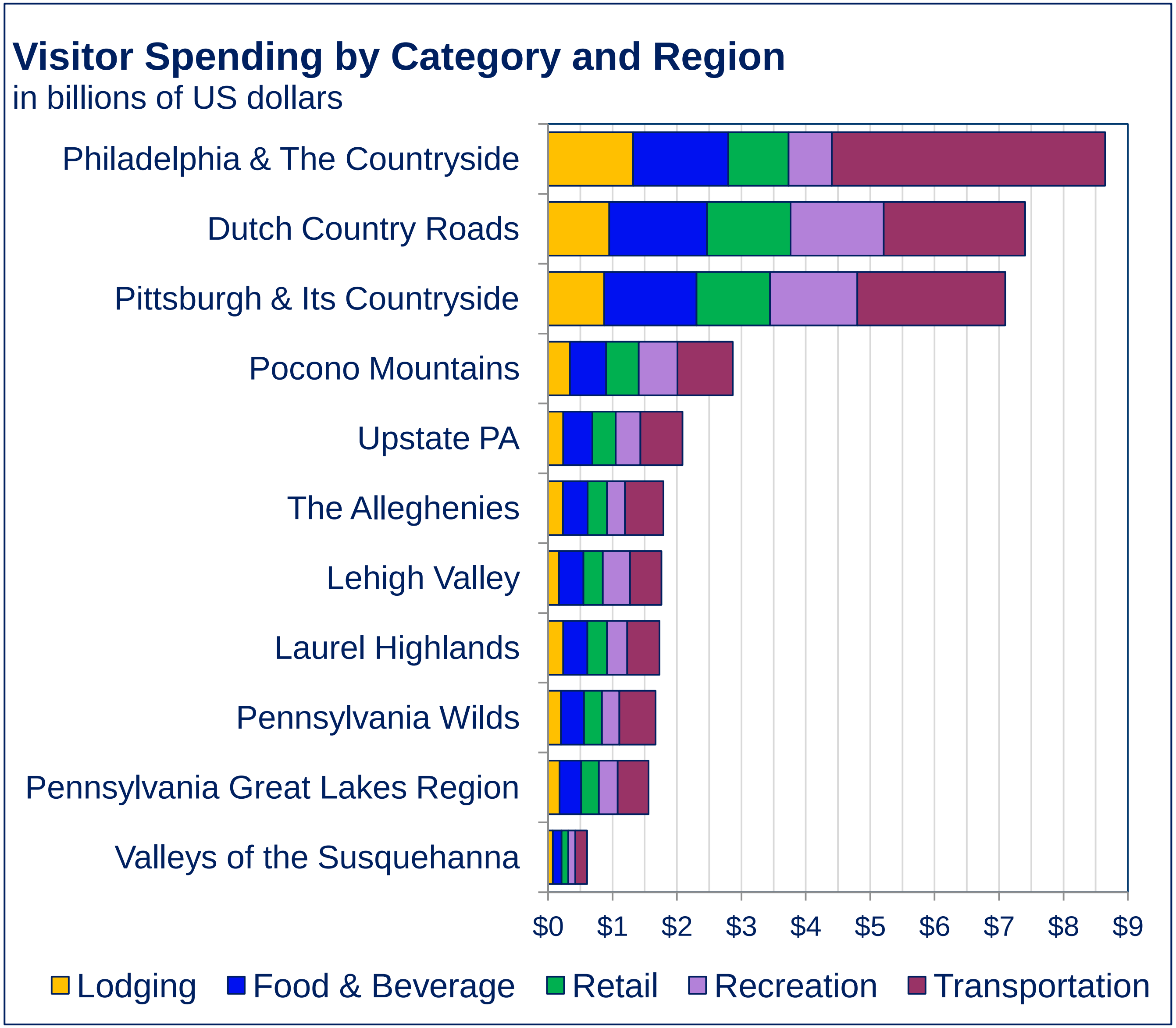
Share of Total Visitor Spending by Region



Source: Longwoods International, Tourism Economics

Regional spending by category

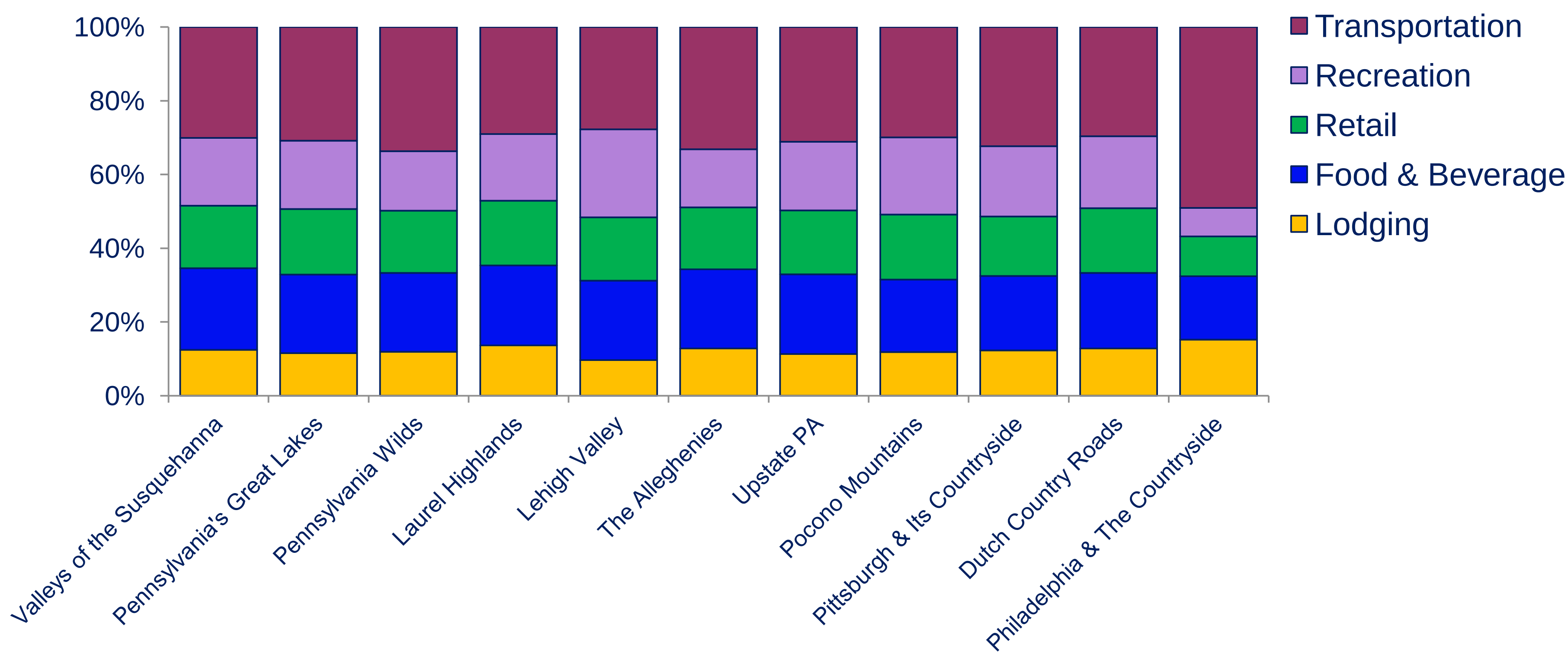
- Airports increased the transportation spending in both the Philadelphia and Pittsburgh regions.
- As in 2010, travelers to the Dutch Country Roads and Pittsburgh regions in 2011 spent far more on recreation than travelers to other regions.



Regional spending by category -- % of total

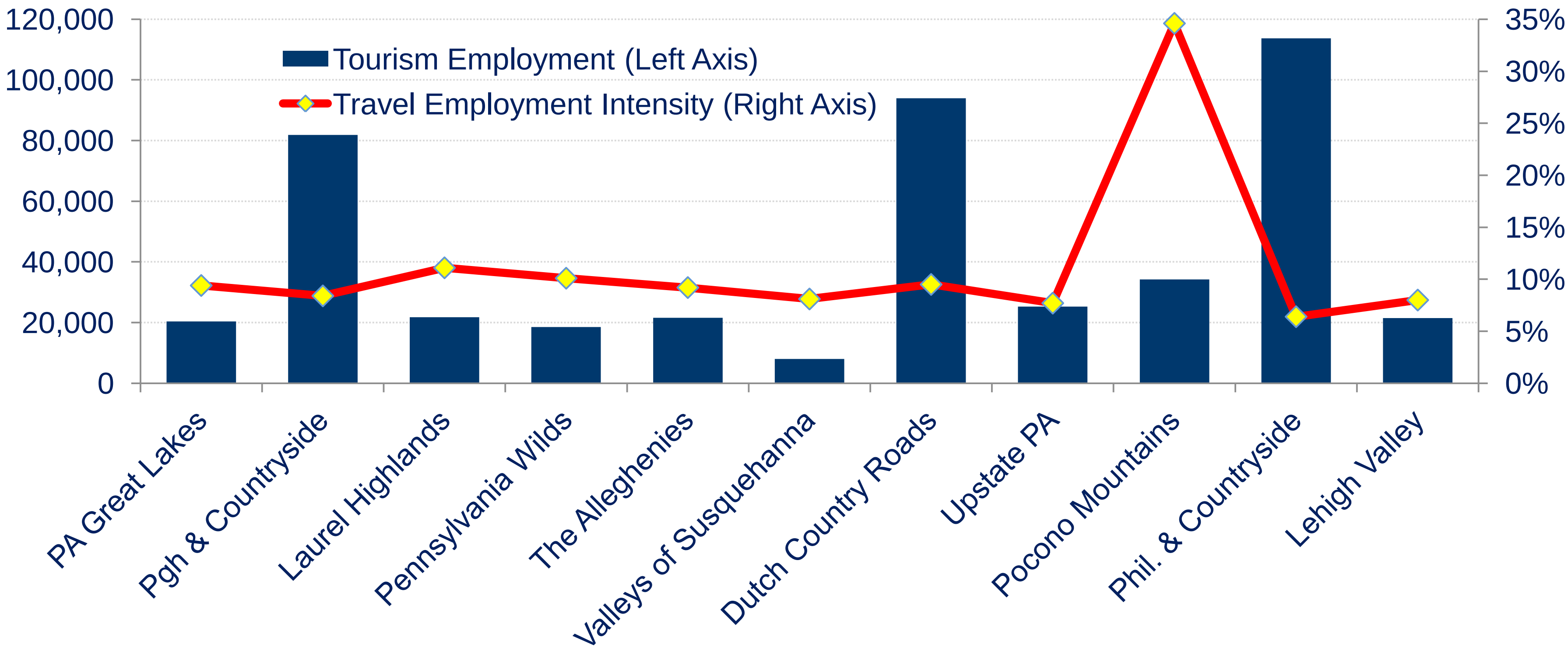
- On a proportional basis, spending on recreation was strongest in the Lehigh Valley and Pocono Mountains regions in 2011 and 2010.
- Visitors to the Philadelphia & The Countryside and Laurel Highlands regions spent proportionally more on lodging than visitors to PA's other tourism regions.

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 dependent of all the regions on travel.
- The Philadelphia region has the highest number of travel-related jobs, but the region's highly diverse economic base makes the region the least dependent on travel.



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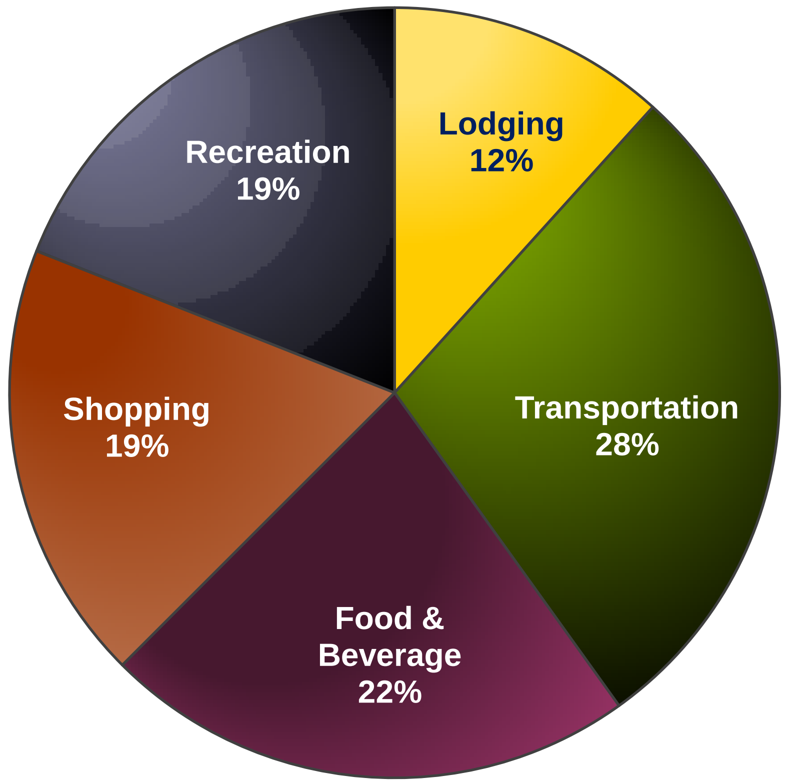
Pennsylvania's Great Lakes Region

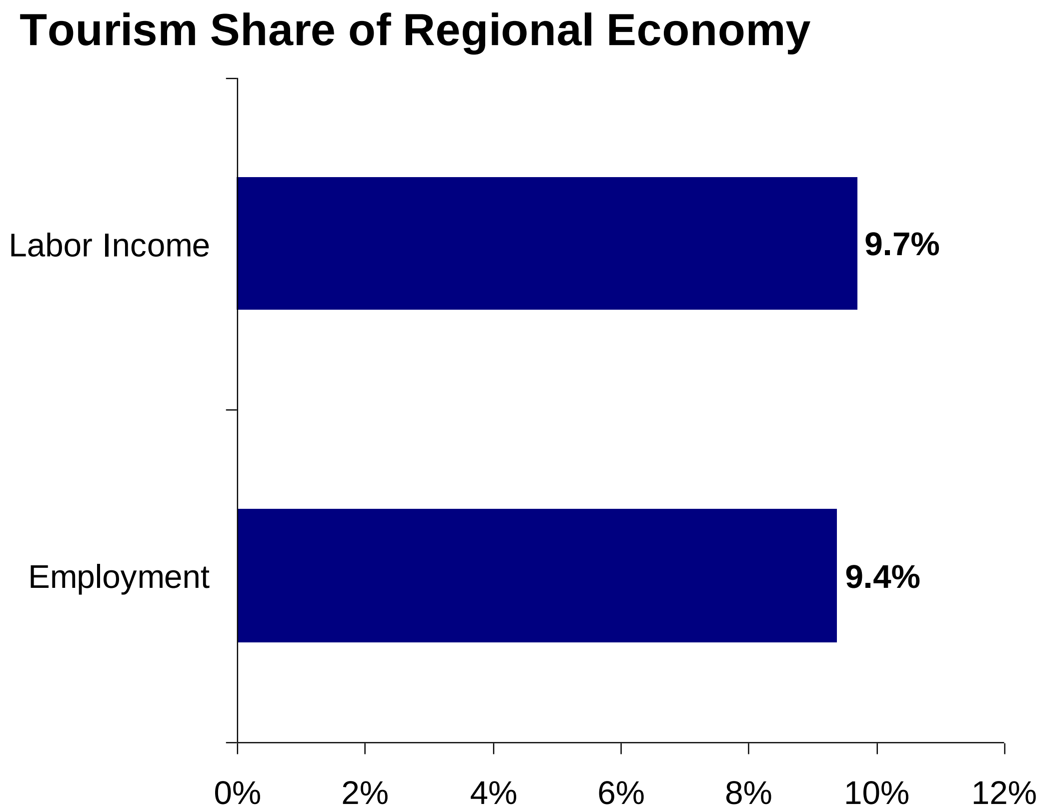
- Pennsylvania's Great Lakes region is comprised of Crawford, Erie, Mercer and Venango counties.
- Visitors spent nearly $1.6 Billion in the region in 2011.
- The region had the highest proportion of its travel and tourism dollars spent on shopping among Pennsylvania's 11 tourism regions.

Pennsylvania's Great Lakes Region Spending by Category



Pennsylvania's Great Lakes Region

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- The travel industry's labor income share for the region rose from 9.3% in 2010 to 9.7% in 2011, due in part to the slight increase in the travel industry's employment share from 9.2% to 9.4%.
- The region ranked 9^{th} in the number of travel-supported jobs among PA's 11 tourism regions, but ranked 5^{th} in employment intensity.



Pennsylvania's Great Lakes Region - Timelines

Tourism Industry Spending (Millions of dollars)							
County	2005	2006	2007	2008	2009	2010	2011
Crawford	259.7	260.0	258.4	274.9	219.7	241.5	249.7
Erie	726.9	733.7	778.8	876.0	741.2	829.4	905.4
Mercer	240.8	241.1	243.2	279.8	233.2	256.0	279.2
Venango	119.2	116.1	118.7	130.2	108.7	118.3	125.2
Great Lakes	1,346.6	1,350.9	1,399.0	1,560.8	1,302.7	1,445.2	1,559.5
Percent Change		0.3%	3.6%	11.6%	-16.5%	10.9%	7.9%

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

Pennsylvania's Great Lakes Region – Visitor Spending by Category

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2011						
Crawford	18.0	57.4	46.8	40.0	87.4	249.7
Erie	113.8	187.4	152.7	185.3	266.3	905.4
Mercer	35.9	63.3	56.7	46.5	76.8	279.2
Venango	12.2	24.4	20.9	17.2	50.5	125.2
Great Lakes	179.9	332.4	277.1	289.0	481.1	1,559.5
Percent Change	6.1%	2.9%	3.6%	5.2%	17.2%	7.9%
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

Pennsylvania's Great Lakes Region – Tourism Satellite Account

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2011				
Crawford	249.7	1.0	11.4	262.1
Erie	905.4	5.9	41.4	952.7
Mercer	279.2	1.5	12.8	293.4
Venango	125.2	0.6	5.7	131.5
Great Lakes	1,559.5	9.0	71.3	1,639.8
Percent Change	7.9%	-0.5%	6.9%	7.8%
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

Pennsylvania's Great Lakes Region – Travel Industry Impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State &	Federal
2011					
Crawford	249.7	2,171	48.4	13.0	11.4
Erie	905.4	7,181	171.7	48.9	40.9
Mercer	279.2	2,485	50.5	14.4	12.3
Venango	125.2	1,153	27.7	6.9	6.2
Great Lakes	1,559.5	12,989	298.2	83.2	70.7
Percent Change	7.9%	2.1%	4.9%	5.5%	4.1%
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

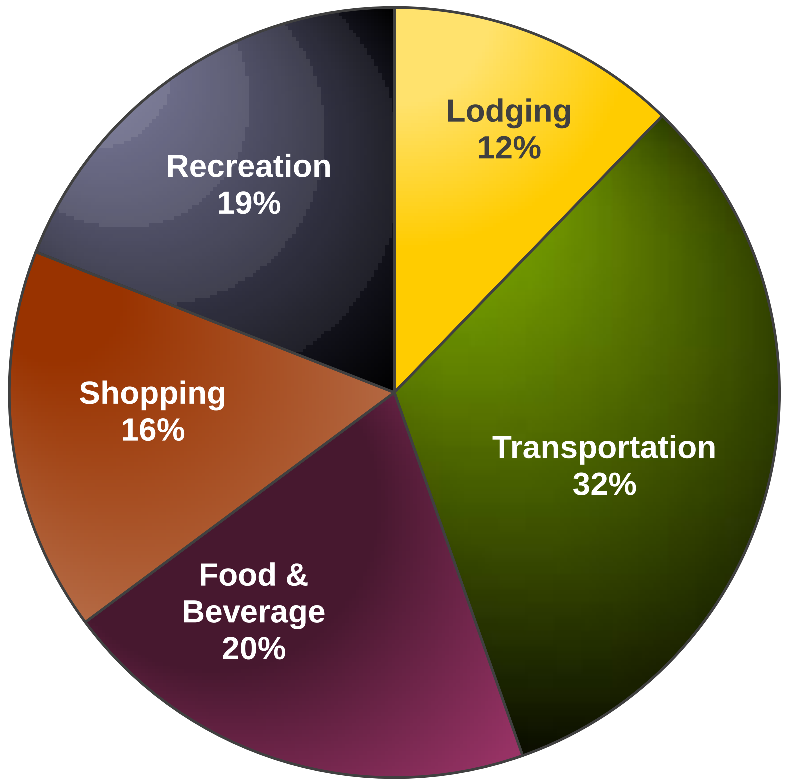
Pennsylvania's Great Lakes Region – Travel Economy Impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2011					
Crawford	262.1	3,435	103.7	23.0	23.0
Erie	952.7	11,168	352.3	84.9	82.3
Mercer	293.4	3,930	111.2	25.3	24.7
Venango	131.5	1,843	58.9	12.2	12.5
Great Lakes	1,639.8	20,376	626.1	145.4	142.4
Percent Change	7.8%	2.1%	4.0%	5.5%	4.1%
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

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 nearly $7.1 billion in the region in 2011.
- As in 2010, the region had the third highest level of traveler spending behind Philadelphia and The Countryside and the Dutch Country Roads regions.

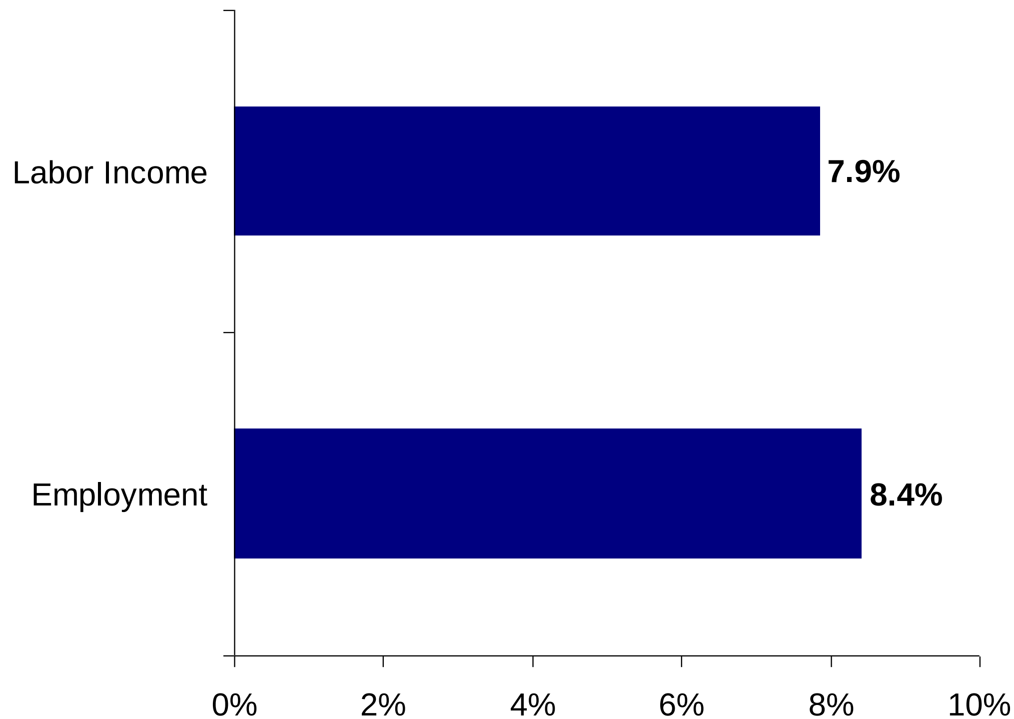
Pittsburgh and Its Countryside Region Spending by Category



Pittsburgh & Its Countryside

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- The travel industry's labor income share for the Pittsburgh region rose from 7.5% in 2010 to 7.9% in 2011, due in part to the increase in the travel industry's employment share from 8.2% to 8.4% in 2011.
- The region had the 3rd highest number of travel-supported jobs of PA's 11 tourism regions, but ranked 7th in employment intensity.

Tourism Share of Regional Economy



Pittsburgh & Its Countryside - Timelines

Tourism Industry Spending (Millions of dollars)							
County	2005	2006	2007	2008	2009	2010	2011
Allegheny	4,010.2	4,096.5	4,360.9	4,979.8	4,354.6	4,828.1	5,259.9
Armstrong	67.1	68.3	71.2	75.3	58.6	71.3	84.1
Beaver	189.9	185.0	197.6	226.9	196.0	217.2	237.6
Butler	367.2	377.9	406.5	455.5	406.1	440.6	486.2
Greene	58.5	56.4	60.8	65.3	58.7	68.9	74.5
Indiana	129.5	124.7	135.3	152.6	144.5	154.2	169.4
Lawrence	89.0	92.0	95.0	101.4	83.7	98.6	113.1
Washington	404.7	415.0	451.2	497.1	482.3	582.7	669.2
Pittsburgh and Its Countryside	5,316.3	5,415.8	5,778.4	6,554.1	5,784.5	6,461.7	7,094.0
Percent Change		1.9%	6.7%	13.4%	-11.7%	11.7%	9.8%

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

Pittsburgh & Its Countryside – Visitor Spending by Category

Tourism Direct Sales
(Millions of dollars)

County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2011						
Allegheny	669.8	1,048.0	833.2	983.1	1,725.9	5,259.9
Armstrong	3.3	16.4	13.0	20.4	31.0	84.1
Beaver	17.5	50.1	39.5	37.8	92.7	237.6
Butler	61.4	106.8	87.1	79.8	151.1	486.2
Greene	9.4	16.9	12.5	11.8	23.9	74.5
Indiana	21.9	38.9	30.3	28.6	49.6	169.4
Lawrence	7.2	25.2	23.0	21.4	36.3	113.1
Washington	78.2	133.1	104.7	168.7	184.4	669.2
Pittsburgh and Its Countryside	868.7	1,435.3	1,143.3	1,351.7	2,295.0	7,094.0
Percent Change	10.6%	6.1%	5.9%	10.5%	13.6%	9.8%
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

Pittsburgh & Its Countryside TSA Spending

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2011				
Allegheny	5,259.9	41.6	240.4	5,541.9
Armstrong	84.1	0.3	3.8	88.3
Beaver	237.6	1.0	10.9	249.5
Butler	486.2	2.5	22.2	511.0
Greene	74.5	0.4	3.4	78.2
Indiana	169.4	0.9	7.7	178.0
Lawrence	113.1	0.4	5.2	118.7
Washington	669.2	3.3	30.6	703.0
Pittsburgh and Its Countryside	7,094.0	50.5	324.3	7,468.7
Percent Change	9.8%	0.4%	8.7%	9.7%
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

Pittsburgh & Its Countryside Impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State &	Federal
2011					
Allegheny	5,259.9	38,112	1,261.7	320.0	274.2
Armstrong	84.1	559	12.2	3.9	3.3
Beaver	237.6	1,975	51.3	12.9	11.6
Butler	486.2	3,828	90.5	25.5	21.7
Greene	74.5	479	9.7	3.5	2.7
Indiana	169.4	1,381	29.5	8.7	7.3
Lawrence	113.1	877	20.2	5.7	4.9
Washington	669.2	5,740	156.5	38.0	34.3
Pittsburgh and Its Countryside	7,094.0	52,952	1,631.5	418.3	360.1
Percent Change	9.8%	2.2%	6.2%	7.5%	5.5%
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

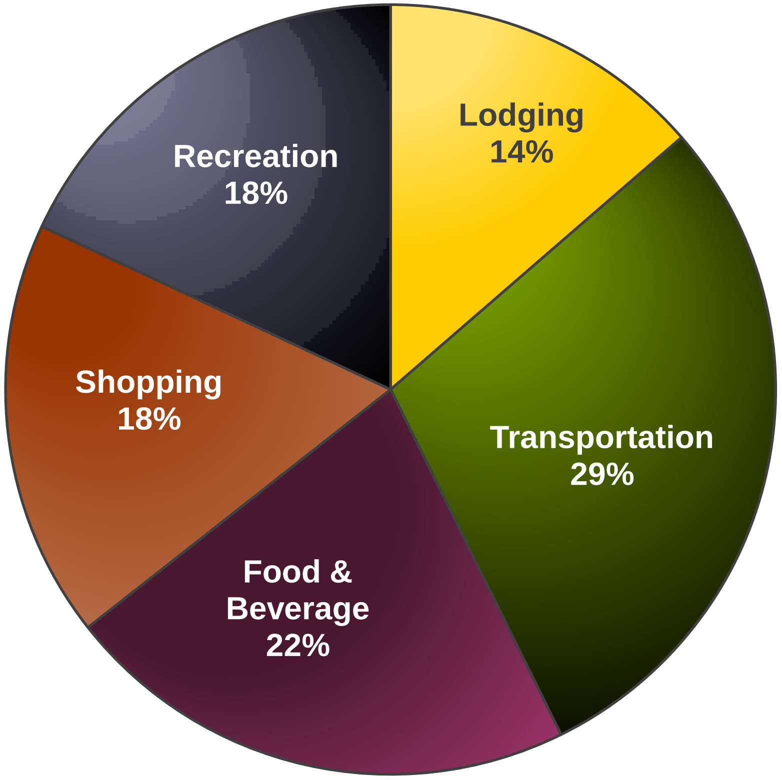
Pittsburgh & Its Countryside – Travel Economy Impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2011					
Allegheny	5,541.9	57,547	2,325.7	550.8	552.9
Armstrong	88.3	1,125	36.9	7.0	6.6
Beaver	249.5	3,479	121.2	22.9	23.4
Butler	511.0	6,082	191.9	44.7	43.7
Greene	78.2	861	26.1	6.1	5.5
Indiana	178.0	2,301	69.1	15.2	14.6
Lawrence	118.7	1,638	54.1	10.1	9.9
Washington	703.0	8,811	305.6	67.1	69.2
Pittsburgh and Its Countryside	7,468.7	81,843	3,130.6	723.9	725.8
Percent Change	9.7%	2.4%	5.4%	7.3%	5.5%
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

Laurel Highlands

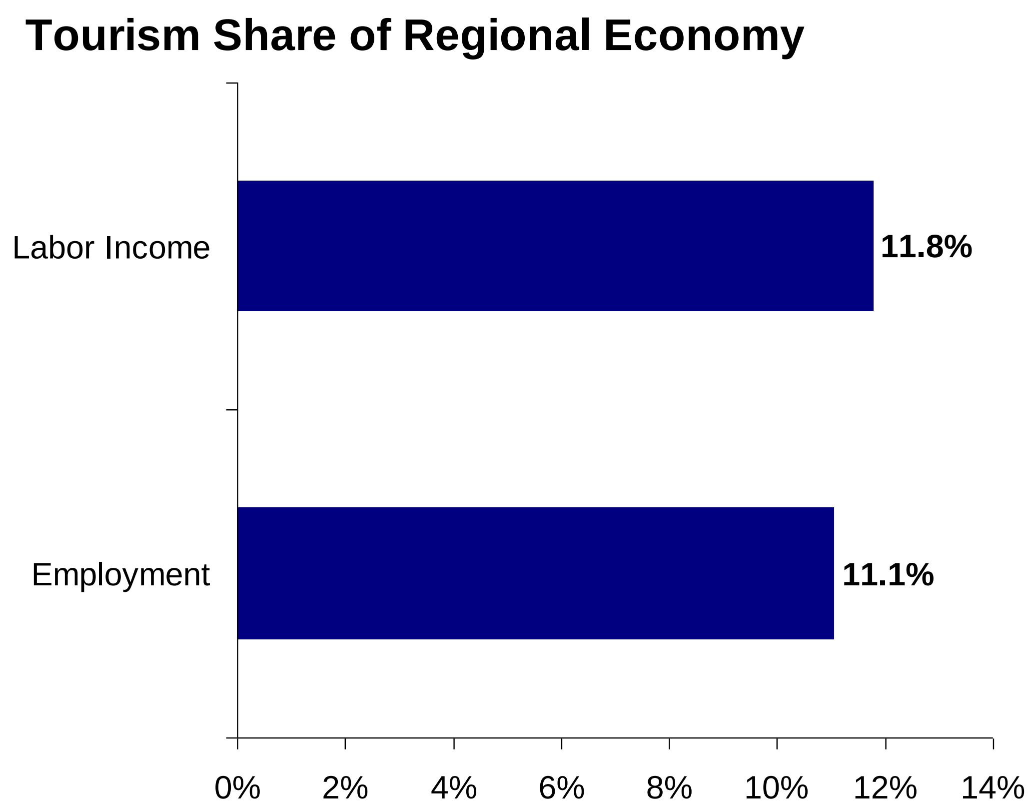
- The Laurel Highlands, in southwestern PA is comprised of the following counties: Fayette, Somerset, and Westmorland.
- Travelers spent over $1.7 billion in the Laurel Highlands region in 2011.
- The region had the second highest share of travelers' dollars going towards lodging and food & beverage costs among the state's 11 tourism regions, and the second lowest share spent on transportation.

Laurel Highlands Region Spending by Category



Laurel Highlands

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- The travel industry's labor income share for the Laurel Highlands region rose from 11.3% in 2010 to 11.8% in 2011, due in part to the increase in the travel industry's employment share from 10.8% to 11.1% in 2011.
- The travel industry supported 11.1% of the region's total job count – the second highest percentage of PA's eleven tourism regions.



Laurel Highlands - Timelines

Tourism Industry Spending (Millions of dollars)							
County	2005	2006	2007	2008	2009	2010	2011
Fayette	543.4	562.1	563.6	618.4	538.2	595.7	634.6
Somerset	322.0	309.6	325.2	357.2	306.9	330.1	370.0
Westmoreland	609.9	621.0	623.5	706.4	587.6	651.6	725.2
Laurel Highlands	1,475.3	1,492.8	1,512.2	1,682.0	1,432.6	1,577.3	1,729.8
Percent Change		1.2%	1.3%	11.2%	-14.8%	10.1%	9.7%

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

Laurel Highlands – Visitor Spending by Category

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2011						
Fayette	108.9	139.5	109.7	116.6	159.8	634.6
Somerset	51.7	80.1	61.6	64.9	111.6	370.0
Westmoreland	75.2	155.6	132.6	130.5	231.3	725.2
Laurel Highlands	235.8	375.2	303.9	312.0	502.8	1,729.8
Percent Change	7.8%	4.5%	5.3%	10.6%	17.2%	9.7%
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

Laurel Highlands – Tourism Satellite Account

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2011				
Fayette	634.6	2.9	29.0	666.5
Somerset	370.0	1.9	16.9	388.8
Westmoreland	725.2	3.3	33.1	761.7
Laurel Highlands	1,729.8	8.1	79.1	1,817.0
Percent Change	9.7%	0.5%	8.6%	9.6%
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

Laurel Highlands – Travel Industry Impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State &	Federal
2011					
Fayette	634.6	5,295	129.9	34.0	30.0
Somerset	370.0	3,257	85.7	21.0	18.9
Westmoreland	725.2	5,476	122.5	36.3	30.6
Laurel Highlands	1,729.8	14,028	338.1	91.3	79.5
Percent Change	9.7%	1.5%	4.8%	6.7%	4.7%
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

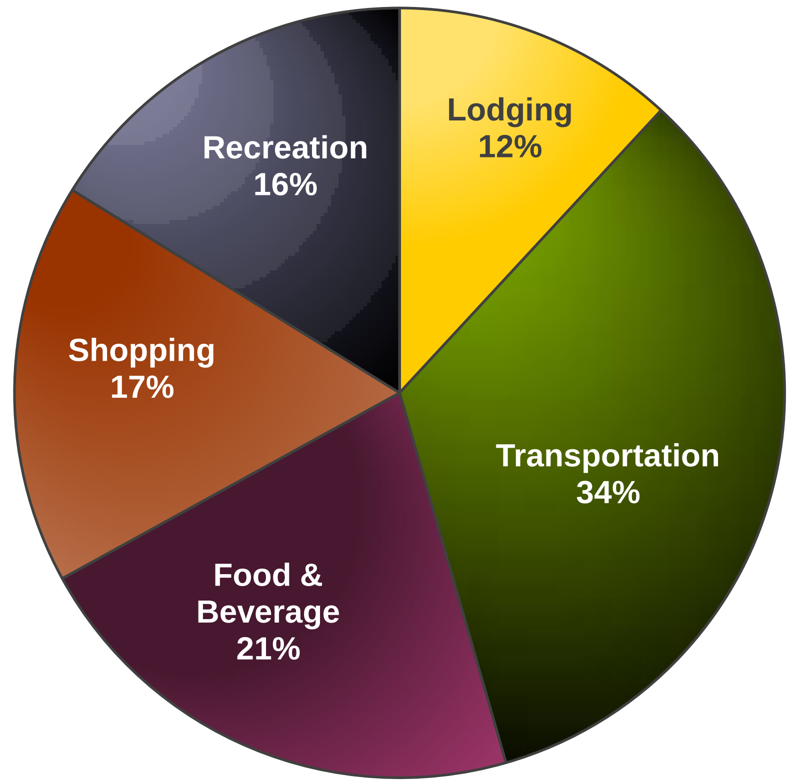
Laurel Highlands – Travel Economy Impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2011					
Fayette	666.5	7,663	239.2	60.0	60.4
Somerset	388.8	4,818	160.7	37.0	38.0
Westmoreland	761.7	9,279	289.7	63.9	61.6
Laurel Highlands	1,817.0	21,760	689.6	160.9	160.0
Percent Change	9.6%	2.0%	4.6%	6.6%	4.7%
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

Pennsylvania Wilds

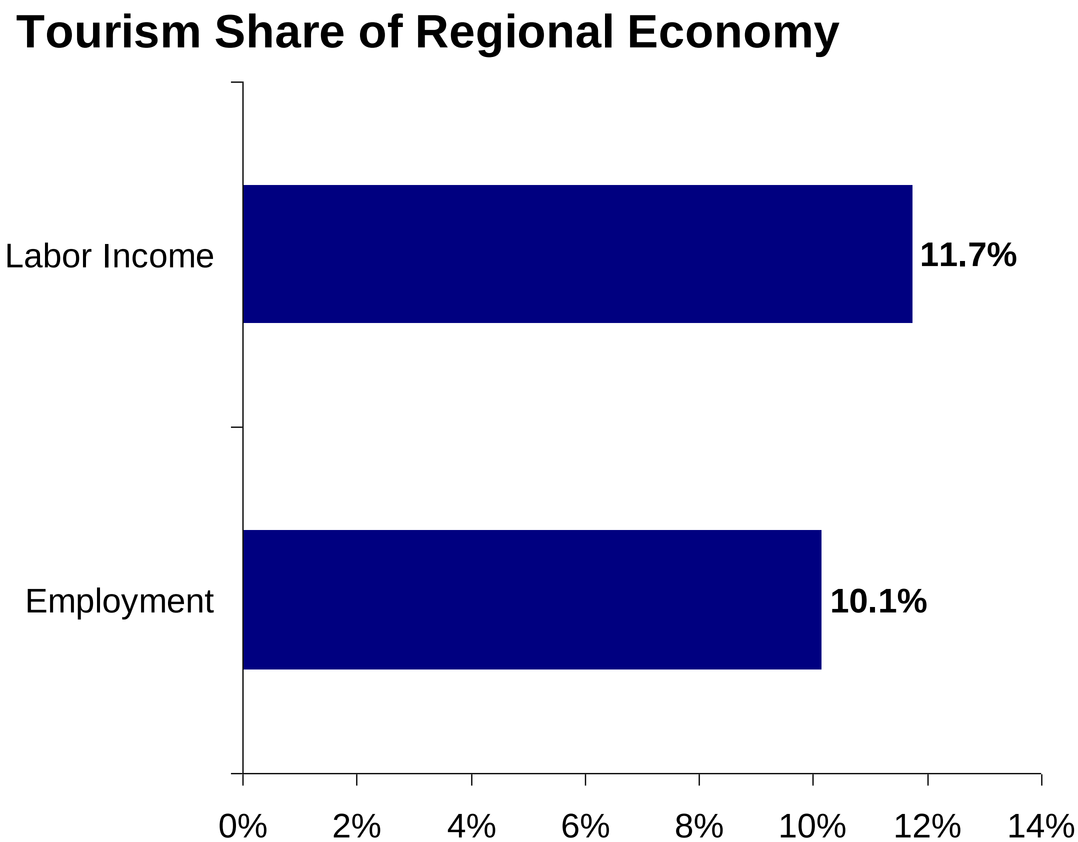
- The Pennsylvania Wilds region is comprised of the following northern tier counties: Cameron, Clarion, Clearfield, Clinton, Elk, Forest, Jefferson, Lycoming, McKean, Potter, Tioga, and Warren.
- Visitors spent nearly $1.7 billion in the Pennsylvania Wilds region in 2011 – an 11.5% rate of growth that was the fourth highest among the state's 11 tourism regions.

Pennsylvania Wilds Region Spending by Category



Pennsylvania Wilds

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- The labor income share for the Pennsylvania Wilds region rose to 11.7% in 2011 from 11.1% in 2010, while the employment share rose to 10.1% from 9.9% in 2010.
- The travel industry's support of 10.1% of the region's total job count was the third highest percentage among PA's 11 tourism regions.



Pennsylvania Wilds – Visitor Spending Timeline

Tourism Industry Spending (Millions of dollars)							
County	2005	2006	2007	2008	2009	2010	2011
Cameron	7.8	7.9	8.4	9.3	7.8	9.0	9.5
Clarion	90.1	94.3	101.7	112.0	93.5	108.1	112.3
Clearfield	222.6	227.5	233.5	250.3	212.3	248.9	261.0
Clinton	109.8	108.9	111.1	123.2	108.0	136.6	150.9
Elk	47.9	47.8	51.5	57.9	47.2	52.3	61.2
Forest	18.2	18.6	19.7	21.2	18.5	20.4	23.7
Jefferson	93.0	90.3	92.6	97.8	82.2	102.9	110.2
Lycoming	231.2	241.5	255.6	293.1	269.3	308.7	384.3
McKean	119.6	120.0	126.1	138.9	123.2	158.9	164.4
Potter	24.6	25.1	26.6	29.3	27.0	30.1	36.5
Tioga	144.1	139.5	149.1	159.1	139.5	171.2	191.7
Warren	121.5	127.9	137.0	157.8	137.7	149.3	162.4
Pennsylvania Wilds	1,230.4	1,249.3	1,312.9	1,450.1	1,266.2	1,496.4	1,668.2
Percent Change		1.5%	5.1%	10.4%	-12.7%	18.2%	11.5%

Pennsylvania Wilds – Employment Timeline

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

Pennsylvania Wilds – Visitor Spending by Category, 2011

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2011						
Cameron	0.6	1.7	1.7	2.4	3.1	9.5
Clarion	14.6	25.5	20.6	18.1	33.4	112.3
Clearfield	30.5	55.9	45.5	43.4	85.6	261.0
Clinton	16.5	32.8	24.1	25.8	51.8	150.9
Elk	7.4	13.3	11.1	9.3	20.2	61.2
Forest	3.4	5.2	4.8	4.2	6.2	23.7
Jefferson	9.8	21.5	17.0	19.5	42.4	110.2
Lycoming	58.3	88.9	67.3	54.2	115.6	384.3
McKean	17.2	32.1	24.9	26.2	64.0	164.4
Potter	5.4	7.6	5.6	6.6	11.4	36.5
Tioga	24.7	40.6	32.8	32.4	61.2	191.7
Warren	9.7	32.6	25.4	27.9	66.8	162.4
Pennsylvania Wilds	198.2	357.7	281.0	269.7	561.6	1,668.2
Percent Change	19.1%	6.4%	5.5%	8.6%	17.2%	11.5%

Pennsylvania Wilds – Visitor Spending by Category, 2010

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

Pennsylvania Wilds – Tourism Satellite Account, 2011

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2011				
Cameron	9.5	0.0	0.4	10.0
Clarion	112.3	0.6	5.1	118.0
Clearfield	261.0	1.3	11.9	274.2
Clinton	150.9	0.7	6.9	158.6
Elk	61.2	0.3	2.8	64.3
Forest	23.7	0.1	1.1	24.9
Jefferson	110.2	0.5	5.0	115.7
Lycoming	384.3	1.9	17.6	403.8
McKean	164.4	0.8	7.5	172.8
Potter	36.5	0.2	1.7	38.4
Tioga	191.7	1.0	8.8	201.4
Warren	162.4	0.6	7.4	170.5
Pennsylvania Wilds	1,668.2	8.1	76.3	1,752.6
Percent Change	11.5%	1.6%	10.4%	11.4%

Pennsylvania Wilds – Tourism Satellite Account, 2010

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

Pennsylvania Wilds – Travel Industry Impacts, 2011

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

County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2011					
Cameron	9.5	75	1.4	0.4	0.4
Clarion	112.3	993	22.1	6.0	5.2
Clearfield	261.0	1,793	44.9	13.2	11.1
Clinton	150.9	990	22.7	7.3	6.0
Elk	61.2	509	9.2	3.0	2.4
Forest	23.7	136	2.6	1.1	0.8
Jefferson	110.2	762	19.6	5.6	4.8
Lycoming	384.3	2,790	69.3	20.1	16.8
McKean	164.4	1,130	27.8	8.2	6.9
Potter	36.5	216	4.8	1.7	1.4
Tioga	191.7	1,451	37.1	10.2	8.8
Warren	162.4	1,149	25.7	7.9	6.6
Pennsylvania Wilds	**1,668.2**	**11,993**	**287.1**	**84.7**	**71.2**
Percent Change	**11.5%**	**2.6%**	**6.5%**	**8.8%**	**6.4%**

Pennsylvania Wilds – Travel Industry Impacts, 2010

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

Pennsylvania Wilds - Travel Economy Impacts, 2011

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2011					
Cameron	10.0	128	3.6	0.8	0.7
Clarion	118.0	1,575	47.6	10.5	10.4
Clearfield	274.2	2,891	95.6	23.2	22.4
Clinton	158.6	1,572	48.5	12.8	12.0
Elk	64.3	854	23.3	5.2	4.9
Forest	24.9	229	6.4	1.9	1.6
Jefferson	115.7	1,304	44.8	9.9	9.6
Lycoming	403.8	4,392	143.1	35.0	33.9
McKean	172.8	1,756	56.5	14.4	14.0
Potter	38.4	378	11.9	3.0	2.7
Tioga	201.4	2,178	71.3	17.9	17.6
Warren	170.5	1,814	54.8	13.9	13.3
Pennsylvania Wilds	1,752.6	19,068	607.3	148.6	143.2
Percent Change	11.4%	2.6%	5.4%	8.6%	6.4%

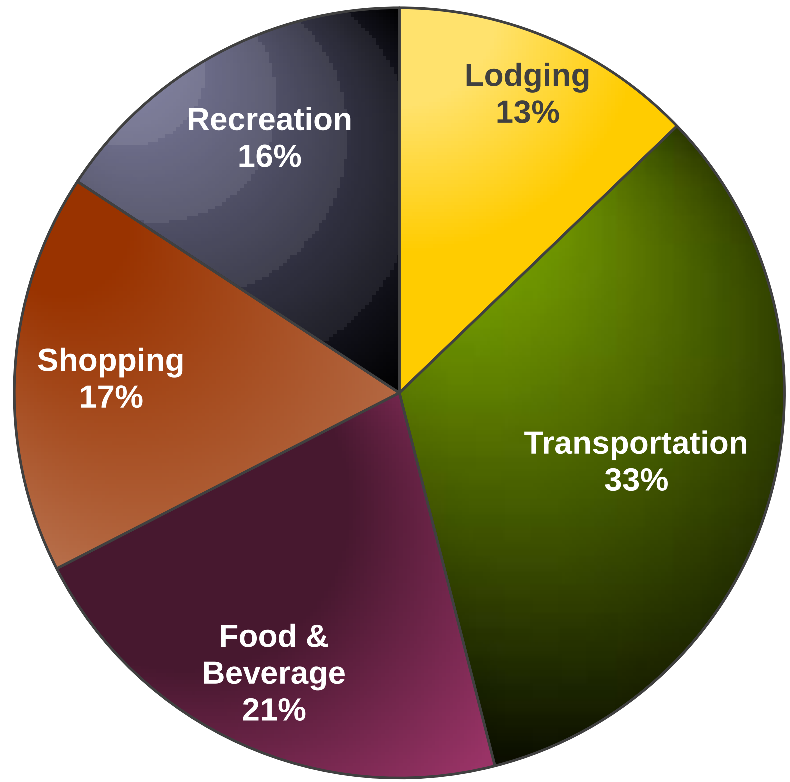
Pennsylvania Wilds – Travel Economy Impacts, 2010

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

Valleys of the Susquehanna

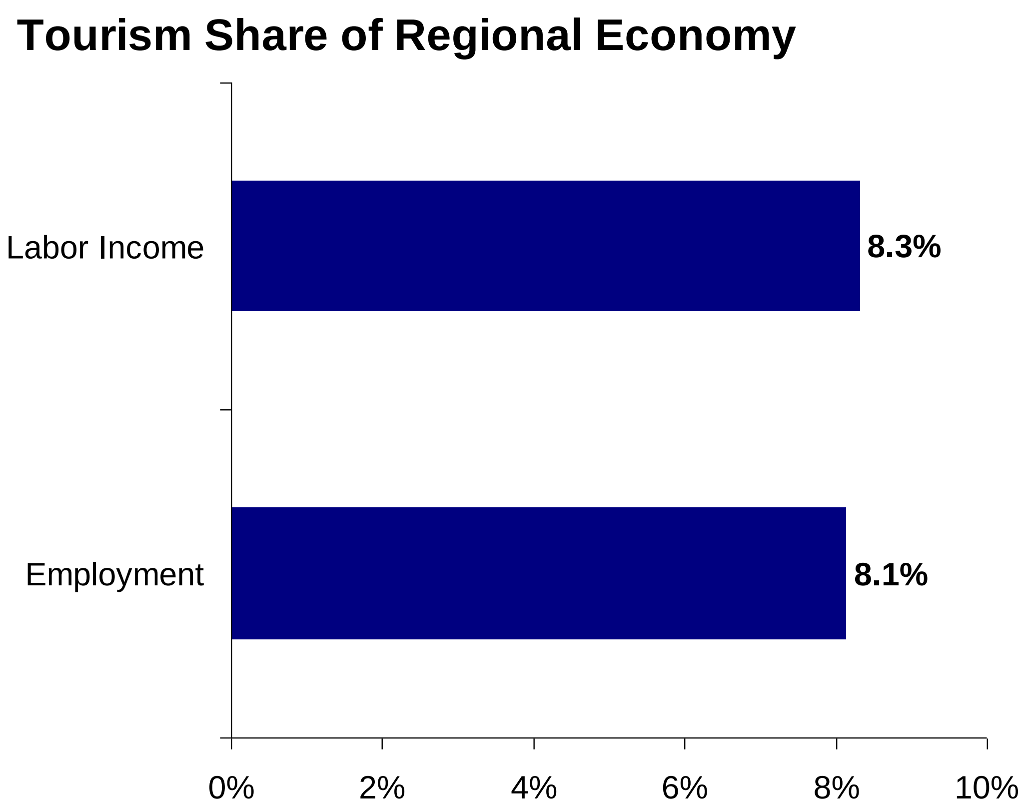
- The Valleys of the Susquehanna region is comprised of the following counties: Columbia, Montour, Northumberland, Snyder, and Union.
- Visitors spent $604 million in this region in 2011.
- The Valleys of the Susquehanna region had the highest share of spending on food & beverages among the state's 11 tourism regions.

Valleys of the Susquehanna Region Spending by Category



Valleys of the Susquehanna

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- The travel-related labor income share for the Valleys of the Susquehanna region rose to 8.3% in 2011 from 8.0% in 2010, while the employment share rose to 8.1% from 7.9% in 2010.
- The region had the smallest number of travel-supported jobs among PA's 11 tourism regions, but ranked 9th in travel's employment share.



Valleys of the Susquehanna - Timelines

Tourism Industry Spending (Millions of dollars)							
County	2005	2006	2007	2008	2009	2010	2011
Columbia	114.5	117.8	125.5	140.3	114.5	127.6	150.3
Montour	84.8	84.5	84.9	93.5	79.2	88.0	97.2
Northumberland	96.5	99.5	102.9	114.4	99.1	113.3	119.0
Snyder	79.8	81.0	84.3	90.3	74.9	83.5	90.3
Union	110.2	113.4	118.0	136.7	115.7	124.3	147.6
Valleys of the Susquehanna	485.7	496.1	515.6	575.2	483.3	536.6	604.5
Percent Change		2.1%	3.9%	11.6%	-16.0%	11.0%	12.6%

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

Valleys of the Susquehanna – Visitor Spending by Category

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2011						
Columbia	20.2	35.7	25.6	25.1	43.8	150.3
Montour	16.1	20.7	16.1	20.4	24.0	97.2
Northumberland	4.0	21.6	15.3	29.6	48.5	119.0
Snyder	10.1	20.9	18.2	15.8	25.3	90.3
Union	24.5	35.0	27.2	20.6	40.2	147.6
Valleys of the Susquehanna	74.9	134.0	102.4	111.5	181.7	604.5
Percent Change	14.4%	6.9%	6.6%	14.2%	19.4%	12.6%
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

Valleys of the Susquehanna – Tourism Satellite Account

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2011				
Columbia	150.3	0.8	6.9	158.0
Montour	97.2	0.5	4.4	102.2
Northumberland	119.0	0.4	5.4	124.9
Snyder	90.3	0.4	4.1	94.9
Union	147.6	0.8	6.7	155.1
Valleys of the Susquehanna	604.5	3.0	27.6	635.1
Percent Change	12.6%	2.2%	11.6%	12.5%
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

Valleys of the Susquehanna – Travel Industry Impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2011					
Columbia	150.3	1,217	26.2	7.7	6.5
Montour	97.2	839	18.9	5.2	4.4
Northumberland	119.0	1,013	25.9	6.4	5.8
Snyder	90.3	702	14.3	4.5	3.7
Union	147.6	1,152	27.4	7.8	6.6
Valleys of the Susquehanna	604.5	4,924.4	112.7	31.6	27.0
Percent Change	12.6%	2.6%	3.9%	8.4%	5.3%
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

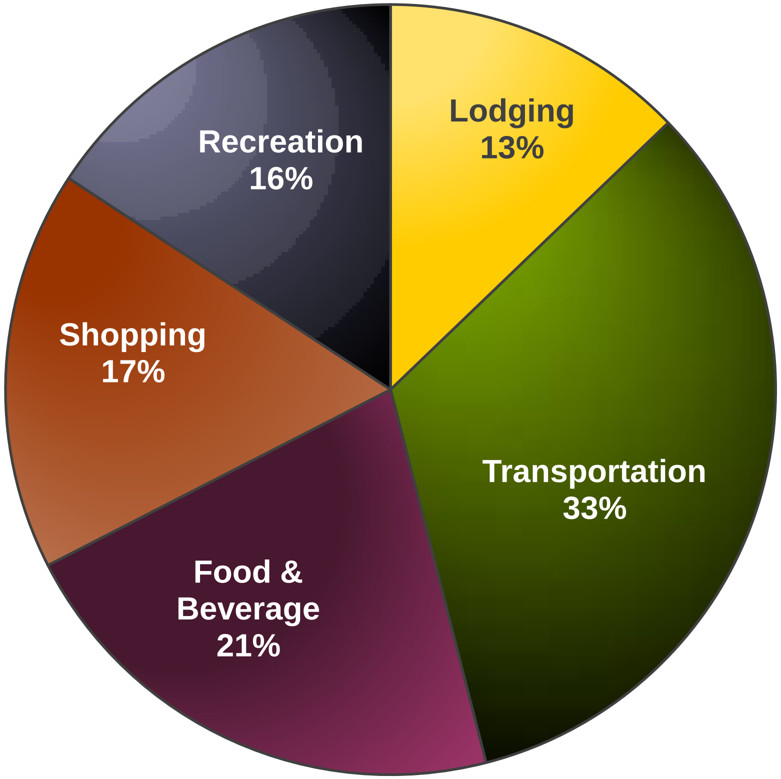
Valleys of the Susquehanna – Travel Economy Impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2011					
Columbia	158.0	1,984	59.4	13.5	13.0
Montour	102.2	1,231	36.0	9.1	9.0
Northumberland	124.9	1,834	63.7	11.4	11.8
Snyder	94.9	1,160	33.7	7.8	7.4
Union	155.1	1,793	56.3	13.6	13.2
Valleys of the Susquehanna	635.1	8,002.0	249.2	55.4	54.4
Percent Change	12.5%	2.7%	3.6%	8.1%	5.3%
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

The Allegheries

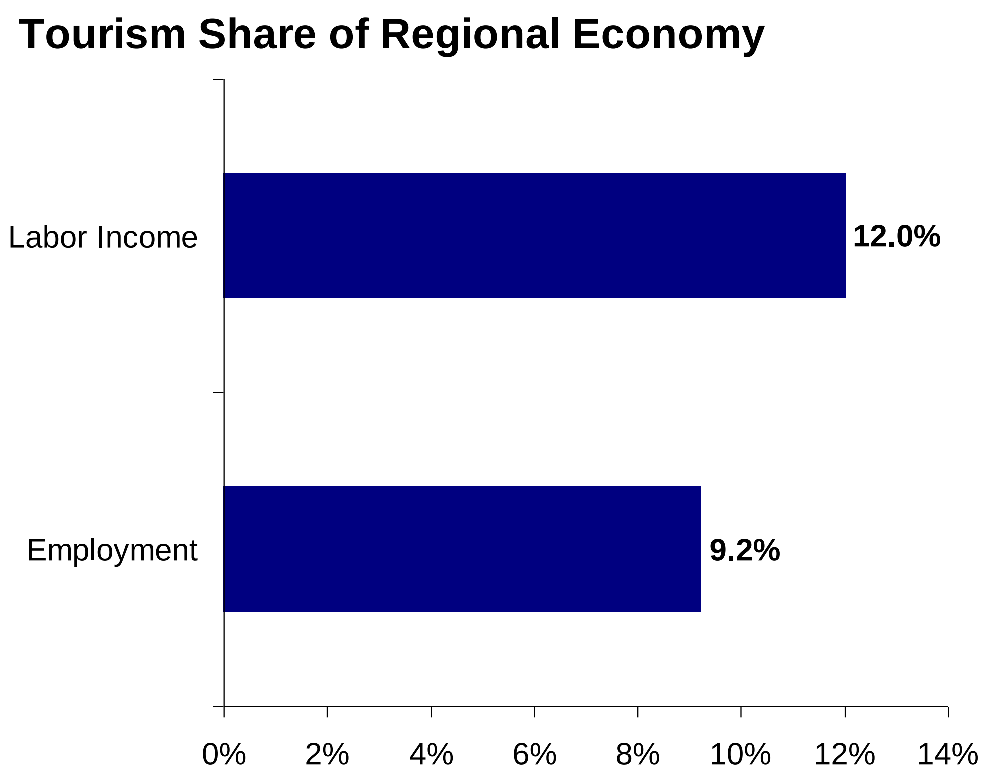
- The Allegheries is comprised of the following counties: Bedford, Blair, Cambria, Centre, Fulton, Huntingdon, Juniata, and Mifflin.
- Visitors spent nearly $1.8 billion in The Allegheries region in 2011.
- Visitors to the region spent a relatively high percentage of their travel dollars on lodging and transportation, with the region ranking 3rd in the percentage of visitor dollars spent on these categories, but among the lowest for recreation and shopping.

The Allegheries Region Spending by Category



The Alleghenies

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- The travel-related labor income share for The Alleghenies region rose sharply from 10.6% in 2010 to 12.0% in 2011, while the employment share rose to 9.2% from 8.3% in 2010.
- The number of travel-supported jobs and related employment share for the region were both roughly in the middle for the state's 11 tourism regions.



The Alleghenies - Timelines

Tourism Industry Spending (Millions of dollars)							
County	2005	2006	2007	2008	2009	2010	2011
Bedford	244.2	243.5	259.6	286.0	239.0	263.0	279.9
Blair	257.8	260.4	278.1	296.8	249.3	271.2	296.1
Cambria	235.2	232.3	244.3	280.9	238.5	257.6	291.5
Centre	498.7	511.2	531.4	616.4	545.6	588.7	649.3
Fulton	18.8	19.2	20.4	22.4	17.4	19.3	21.6
Huntingdon	129.5	125.7	135.3	146.6	129.1	144.1	152.4
Juniata	28.0	28.6	30.3	33.4	28.5	31.0	34.7
Mifflin	57.6	58.4	60.8	67.0	54.4	58.9	62.6
The Alleghenies	1,469.8	1,479.2	1,560.1	1,749.6	1,501.9	1,633.9	1,788.2
Percent Change		0.6%	5.5%	12.1%	-14.2%	8.8%	9.4%

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

The Alleghenies – Visitor Spending by Category

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2011						
Bedford	40.1	55.3	43.9	44.0	96.6	279.9
Blair	29.3	61.8	51.7	48.1	105.2	296.1
Cambria	25.9	58.2	46.9	47.5	112.9	291.5
Centre	113.2	147.1	111.4	95.5	182.1	649.3
Fulton	1.3	4.3	3.7	4.0	8.4	21.6
Huntingdon	12.0	33.1	25.2	28.2	53.9	152.4
Juniata	1.7	8.0	5.9	6.2	12.8	34.7
Mifflin	5.7	15.8	11.5	8.2	21.5	62.6
The Alleghenies	229.2	383.6	300.2	281.7	593.5	1,788.2
Percent Change	8.8%	3.4%	3.5%	6.0%	19.6%	9.4%
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

The Allegheniies - Tourism Satellite Account

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2011				
Bedford	279.9	1.3	12.8	294.0
Blair	296.1	1.4	13.5	311.0
Cambria	291.5	1.3	13.3	306.1
Centre	649.3	3.5	29.7	682.6
Fulton	21.6	0.1	1.0	22.6
Huntingdon	152.4	0.6	7.0	160.0
Juniata	34.7	0.1	1.6	36.4
Mifflin	62.6	0.3	2.9	65.7
The Alleghenies	1,788.2	8.6	81.7	1,878.5
Percent Change	9.4%	0.3%	8.4%	9.4%
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

The Alleghenies – Industry Impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2011					
Bedford	279.9	2,015	52.6	14.5	12.6
Blair	296.1	2,544	65.5	16.4	14.7
Cambria	291.5	2,021	60.0	15.6	13.8
Centre	649.3	4,765	121.1	34.3	29.0
Fulton	21.6	152	3.8	1.1	0.9
Huntingdon	152.4	1,308	31.0	8.1	7.2
Juniata	34.7	219	4.4	1.6	1.3
Mifflin	62.6	589	12.6	3.3	2.9
The Alleghenies	1,788.2	13,613.7	351.0	94.9	82.4
Percent Change	9.4%	1.1%	4.3%	6.6%	4.3%
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

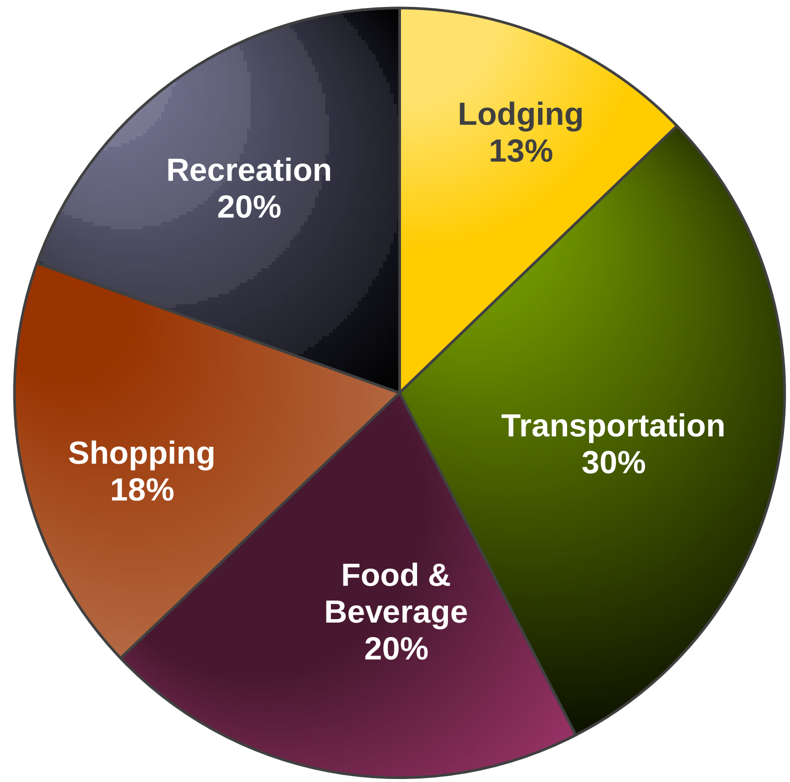
The Alleghenies – Economy Impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2011					
Bedford	294.0	2,987	99.0	25.6	25.3
Blair	311.0	4,061	136.5	28.9	29.6
Cambria	306.1	3,495	132.6	27.6	27.8
Centre	682.6	7,260	238.0	60.0	58.4
Fulton	22.6	281	9.7	1.9	1.9
Huntingdon	160.0	2,016	62.9	14.4	14.4
Juniata	36.4	447	14.2	2.8	2.5
Mifflin	65.7	1,036	32.0	5.9	5.9
The Alleghenies	1,878.5	21,583.2	724.8	167.0	165.8
Percent Change	9.4%	1.4%	3.7%	6.4%	4.3%
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

Dutch Country Roads

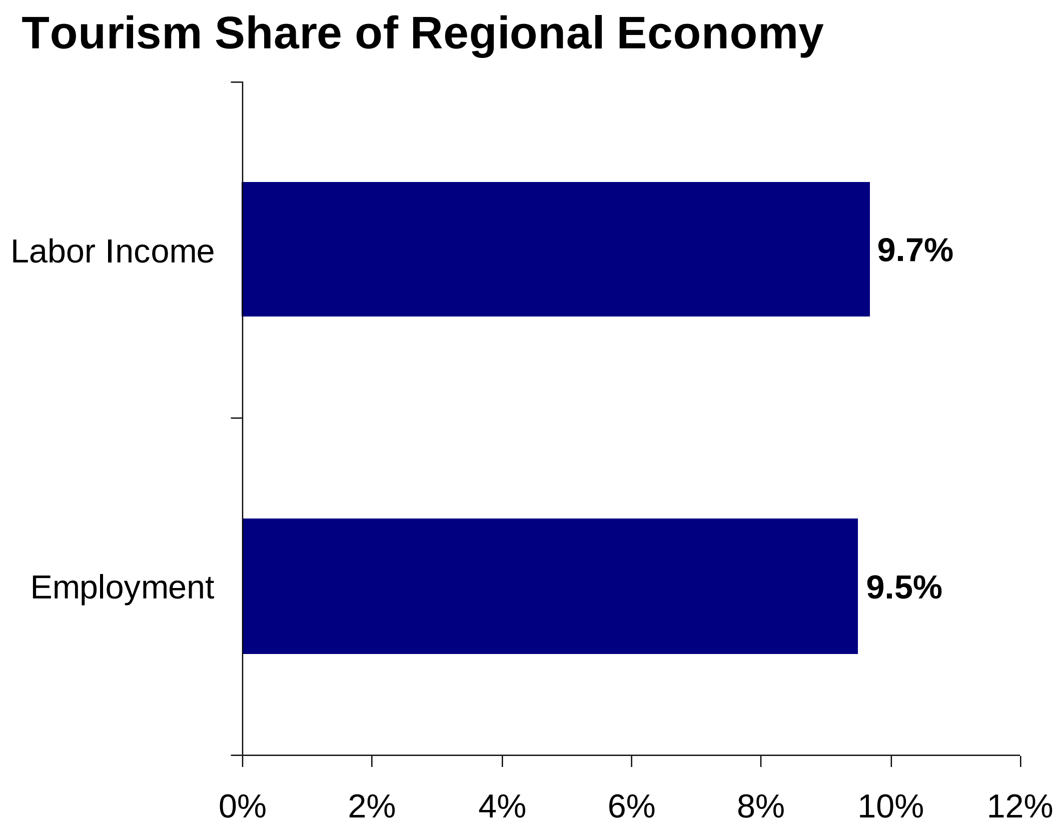
- The Dutch Country Roads region is comprised of the following counties: Adams, Cumberland, Dauphin, Franklin, Lancaster, Lebanon, Perry, and York.
- Visitors spent $7.3 billion in the Dutch Country Roads region in 2011.
- The Dutch Country Roads region had the 3rd highest share of spending on shopping and recreation, and the 4th highest share of spending on lodging among the state's 11 tourism regions.

Dutch Country Roads Region Spending by Category



Dutch Country Roads

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- The travel-related labor income share for the Dutch Country Roads region fell slightly from 9.9% in 2010 to 9.7% in 2011, while the employment share also fell – from 9.9% in 2010 to 9.5% in 2011.
- The number of travel-supported jobs was the second highest of the state's 11 tourism regions, and the region ranked 4th in employment share.



Dutch Country Roads - Timelines

Tourism Industry Spending (Millions of dollars)							
County	2005	2006	2007	2008	2009	2010	2011
Adams	479.1	502.2	535.1	602.8	520.9	555.8	605.4
Berks	643.8	650.6	668.1	746.9	623.7	687.7	761.1
Cumberland	634.4	657.6	674.9	774.2	628.3	677.8	726.1
Dauphin	1,704.3	1,801.6	1,867.7	2,142.4	1,878.7	2,013.3	2,136.2
Franklin	248.3	259.6	280.8	322.2	270.2	286.5	296.7
Lancaster	1,436.6	1,464.4	1,498.0	1,706.5	1,523.1	1,669.7	1,795.0
Lebanon	152.4	154.8	158.9	182.2	159.9	170.9	185.3
Perry	43.0	42.9	44.2	48.6	40.6	43.6	48.5
York	720.2	741.2	764.3	829.2	706.5	753.5	849.7
Dutch Country Roads	6,062.2	6,274.7	6,491.9	7,355.2	6,351.8	6,858.9	7,404.0
Percent Change		3.5%	3.5%	13.3%	-13.6%	8.0%	7.9%

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

Dutch Country Roads – Visitor Spending by Category

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2011						
Adams	77.8	120.0	110.7	140.6	156.2	605.4
Berks	74.0	163.7	144.8	135.4	243.3	761.1
Cumberland	99.5	163.9	127.2	118.0	217.5	726.1
Dauphin	322.3	392.9	320.7	496.0	604.4	2,136.2
Franklin	31.1	64.2	49.2	52.6	99.6	296.7
Lancaster	235.7	367.6	347.1	318.7	525.8	1,795.0
Lebanon	14.8	43.8	37.5	31.4	57.8	185.3
Perry	1.9	10.7	8.4	9.7	17.8	48.5
York	90.6	188.5	155.7	143.2	271.8	849.7
Dutch Country Roads	947.8	1,515.2	1,301.2	1,445.7	2,194.1	7,404.0
Percent Change	5.6%	3.2%	4.0%	6.6%	16.3%	7.9%
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

Dutch Country Roads – Tourism Satellite Account

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2011				
Adams	605.4	3.2	27.7	636.3
Berks	761.1	3.9	34.8	799.8
Cumberland	726.1	3.9	33.2	763.1
Dauphin	2,136.2	15.3	97.6	2,249.2
Franklin	296.7	1.5	13.6	311.8
Lancaster	1,795.0	11.8	82.0	1,888.8
Lebanon	185.3	0.8	8.5	194.6
Perry	48.5	0.2	2.2	50.9
York	849.7	4.1	38.8	892.6
Dutch Country Roads	7,404.0	44.6	338.4	7,787.0
Percent Change	7.9%	-0.5%	6.9%	7.9%
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

Dutch Country Roads – Travel Industry Impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2011					
Adams	605.4	4,788	127.0	33.1	29.0
Berks	761.1	6,238	165.2	42.2	37.3
Cumberland	726.1	5,935	145.4	39.0	33.8
Dauphin	2,136.2	17,887	545.4	130.9	116.0
Franklin	296.7	2,288	59.0	15.8	13.8
Lancaster	1,795.0	14,753	358.3	97.2	83.5
Lebanon	185.3	1,562	46.1	10.7	9.9
Perry	48.5	310	7.1	2.2	1.9
York	849.7	7,165	183.5	46.7	41.5
Dutch Country Roads	7,404.0	60,927	1,637.0	417.8	366.6
Percent Change	7.9%	1.1%	5.6%	5.4%	4.5%
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

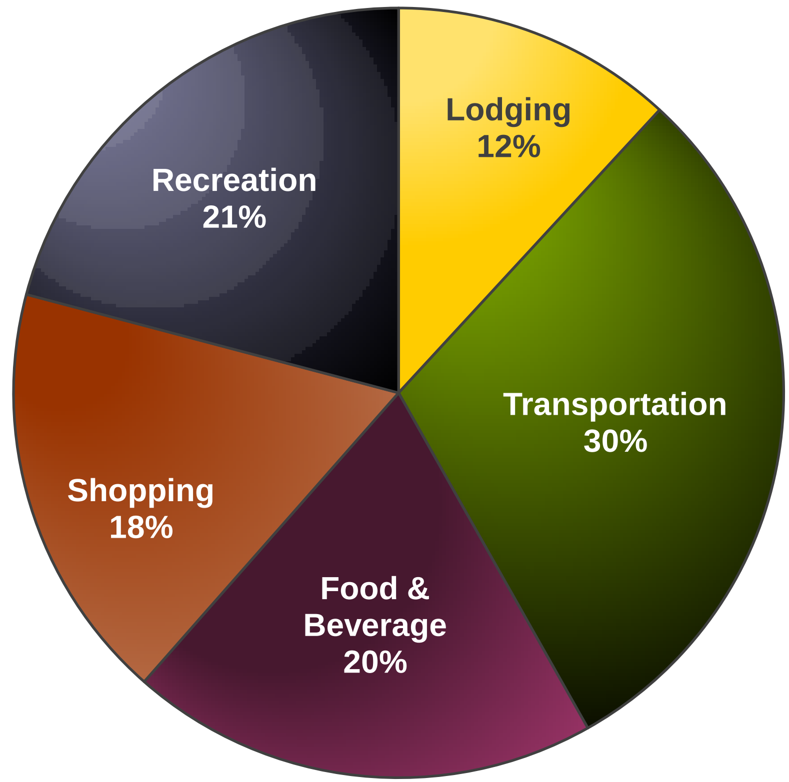
Dutch Country Roads – Travel Economy Impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2011					
Adams	636.3	7,260	245.5	58.1	58.5
Berks	765.1	10,456	364.0	74.2	75.1
Cumberland	763.1	9,204	295.3	68.5	68.2
Dauphin	2,249.2	25,329	945.5	227.3	233.9
Franklin	311.8	3,860	132.2	27.8	27.7
Lancaster	1,888.8	22,530	713.6	170.0	168.2
Lebanon	194.6	2,785	105.8	18.9	19.9
Perry	50.9	672	23.1	4.0	3.8
York	892.6	11,824	400.4	82.3	83.6
Dutch Country Roads	7,752.3	93,920	3,225.5	731.2	738.8
Percent Change	1.7%	1.5%	5.0%	5.5%	4.5%
2010					
Adams	584.6	7,157	235.4	55.1	56.4
Berks	1,127.1	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	7,624.0	92,528	3,071.9	692.8	707.0

Pocono Mountains

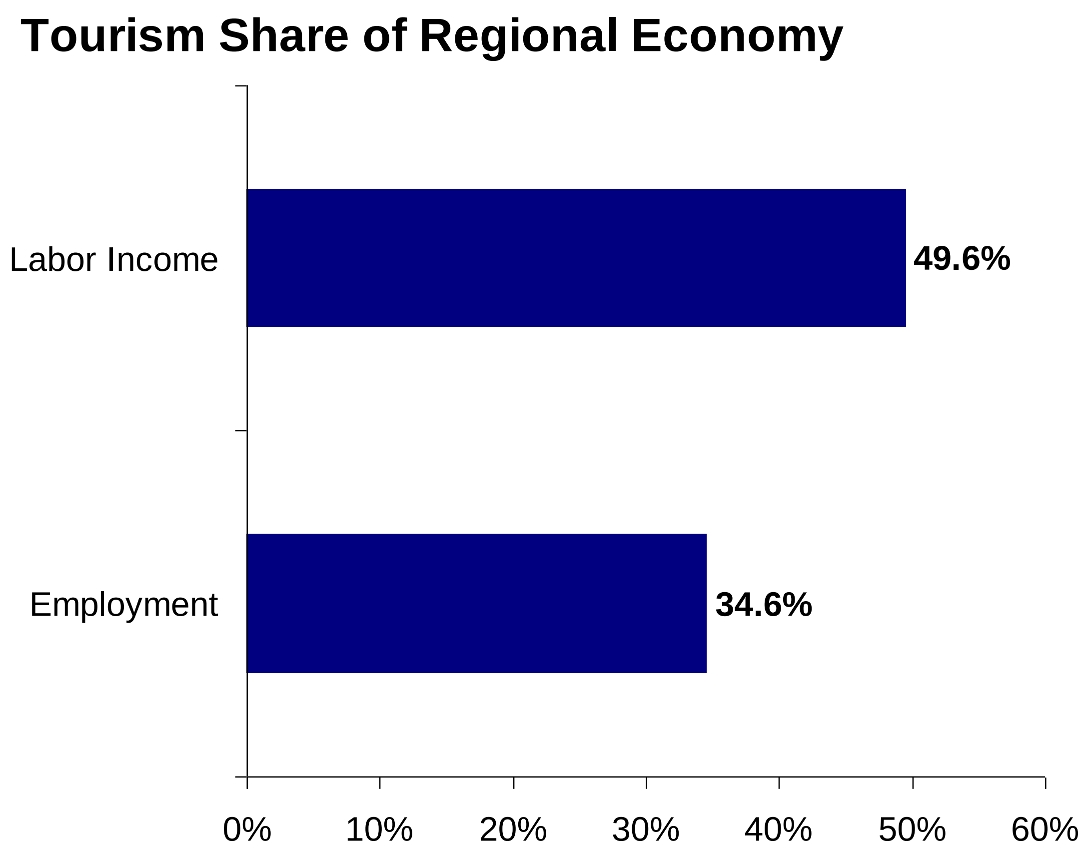
- The Pocono Mountains region is comprised of the following counties: Carbon, Monroe, Pike, and Wayne.
- Visitors spent $2.9 billion in the Pocono's region in 2011, making the region the 4th highest in terms of traveler spending among the state's eleven tourism regions.
- The Pocono Mountains region had the 2nd highest share of spending on shopping and recreation, among the state's 11 tourism regions.

Pocono Mountains Region Spending by Category



Pocono Mountains

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- Overall, the travel industry grew 3.1% in 2011.
- The Pocono Mountains region had the 4th highest number of travel-supported jobs of the state's 11 tourism region's, while the percentage of labor income and employment supported by travel was the highest of the regions.



Pocono Mountains - Timelines

Tourism Industry Spending (Millions of dollars)							
County	2005	2006	2007	2008	2009	2010	2011
Carbon	299.4	288.8	303.3	320.2	294.5	314.7	331.8
Monroe	1,371.4	1,370.7	1,472.5	1,665.3	1,372.6	1,502.1	1,549.4
Pike	545.4	543.5	559.6	616.5	520.7	538.0	551.9
Wayne	371.4	382.6	409.3	437.6	400.4	422.4	431.0
Pocono Mountains	2,587.5	2,585.6	2,744.7	3,039.6	2,588.2	2,777.2	2,864.2
Percent Change		-0.1%	6.2%	10.7%	-14.9%	7.3%	3.1%

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

Pocono Mountains - Visitor Spending by Category

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2011						
Carbon	37.4	66.1	52.7	65.4	110.4	331.8
Monroe	191.4	285.2	290.2	361.6	421.0	1,549.4
Pike	61.8	119.5	90.0	93.0	187.6	551.9
Wayne	49.0	92.4	72.1	78.1	139.4	431.0
Pocono Mountains	339.5	563.2	505.0	598.1	858.5	2,864.2
Percent Change	3.2%	-1.1%	-2.7%	2.3%	10.8%	3.1%
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

Pocono Mountains – Tourism Satellite Account

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2011				
Carbon	331.8	1.4	15.2	348.5
Monroe	1,549.4	7.8	70.8	1,628.0
Pike	551.9	2.5	25.2	579.7
Wayne	431.0	1.7	19.7	452.4
Pocono Mountains	2,864.2	13.5	130.9	3,008.6
Percent Change	3.1%	-3.7%	2.1%	3.1%
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

Pocono Mountains – Travel Industry Impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2011					
Carbon	331.8	2,733	59.7	16.9	14.5
Monroe	1,549.4	13,011	373.5	89.3	81.0
Pike	551.9	4,852	146.5	32.9	30.7
Wayne	431.0	3,120	93.0	23.3	21.0
Pocono Mountains	2,864.2	23,717.0	672.7	162.3	147.3
Percent Change	3.1%	0.4%	3.8%	2.5%	1.7%
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

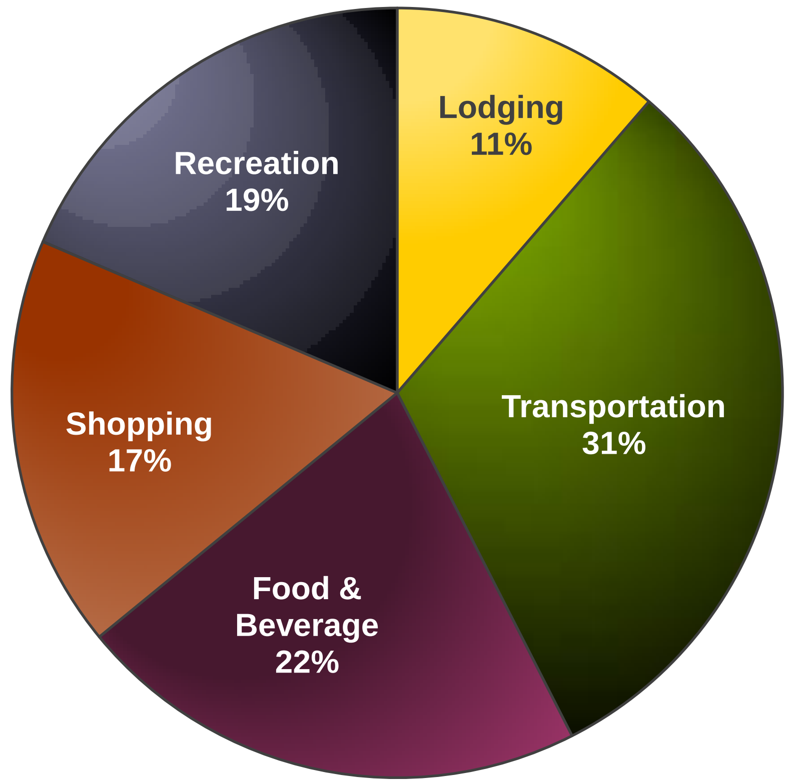
Pocono Mountains – Travel Economy Impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2011					
Carbon	348.5	4,041	116.0	29.8	29.2
Monroe	1,628.0	18,672	663.5	157.4	163.4
Pike	579.7	6,895	255.4	58.2	62.0
Wayne	452.4	4,605	170.0	41.3	42.4
Pocono Mountains	3,008.6	34,213.4	1,204.9	286.8	297.0
Percent Change	3.1%	0.5%	3.1%	2.4%	1.7%
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

Upstate PA

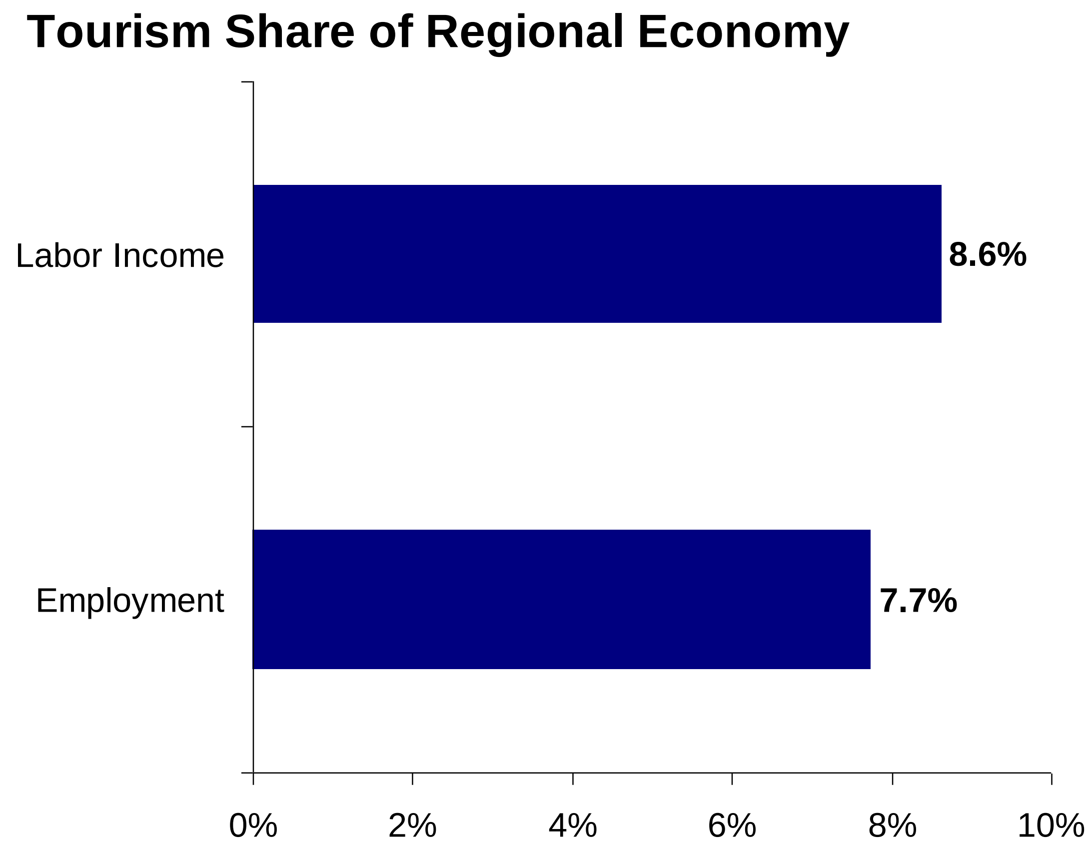
- The Upstate PA region is comprised of the following counties: Bradford, Lackawanna, Luzerne, Schuylkill, Sullivan, Susquehanna, and Wyoming.
- Travelers spent $2.1 billion in the Upstate PA region in 2011.
- Traveler spending in the region grew by 12% for the second straight year, topping $2 billion for the first time ever.
- The Upstate PA region had the 3rd highest share of spending on food & beverages among the state's 11 tourism regions.

Upstate PA Region Spending by Category



Upstate PA

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- Traveler spending directly supported 15,507 jobs in the region in 2011, and 25,272 in total when all impacts are included.
- As an indication that many jobs in the travel economy are well-paying jobs, the share of the region's total labor income supported by travel is higher than travel's share of employment.



Upstate PA - Timelines

Tourism Industry Spending (Millions of dollars)							
County	2005	2006	2007	2008	2009	2010	2011
Bradford	125.2	126.4	134.7	148.3	136.3	170.0	199.7
Lackawanna	478.4	482.8	514.4	566.5	483.1	536.5	614.1
Luzerne	674.5	702.6	752.5	818.6	708.3	795.5	871.1
Schuylkill	164.3	168.8	177.5	195.2	158.5	159.2	176.3
Sullivan	12.7	12.3	12.9	14.4	13.1	16.0	18.7
Susquehanna	107.5	112.6	121.5	140.4	122.7	141.6	151.2
Wyoming	33.2	35.3	37.0	40.3	36.8	41.3	53.0
UPSTATE PA	1,596.0	1,640.7	1,750.4	1,923.7	1,658.6	1,860.2	2,084.0
Percent Change		2.8%	6.7%	9.9%	-13.8%	12.2%	12.0%

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

Upstate PA - Visitor Spending by Category

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2011						
Bradford	20.7	41.2	29.9	32.0	76.0	199.7
Lackawanna	82.0	139.0	124.6	105.1	163.4	614.1
Luzerne	99.8	181.2	142.1	181.5	266.3	871.1
Schuylkill	14.0	42.0	30.0	27.5	62.8	176.3
Sullivan	2.2	3.2	2.4	5.1	5.8	18.7
Susquehanna	10.9	31.5	22.8	27.6	58.4	151.2
Wyoming	6.6	11.3	9.9	8.2	16.9	53.0
UPSTATE PA	236.2	449.4	361.7	387.1	649.6	2,084.0
Percent Change	18.2%	7.4%	4.9%	11.2%	18.3%	12.0%
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

Upstate PA – Tourism Satellite Account Measures

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2011				
Bradford	199.7	0.9	9.1	209.8
Lackawanna	614.1	3.4	28.1	645.5
Luzerne	871.1	5.0	39.8	915.9
Schuylkill	176.3	0.8	8.1	185.2
Sullivan	18.7	0.1	0.9	19.6
Susquehanna	151.2	0.6	6.9	158.7
Wyoming	53.0	0.2	2.4	55.6
UPSTATE PA	2,084.0	11.0	95.3	2,190.3
Percent Change	12.0%	1.7%	10.9%	11.9%
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

Upstate PA – Travel Industry Impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2011					
Bradford	199.7	1,326	31.4	9.8	8.1
Lackawanna	614.1	4,882	114.2	32.5	27.4
Luzerne	871.1	6,534	175.6	47.6	40.8
Schuylkill	176.3	1,177	35.3	9.3	8.2
Sullivan	18.7	148	2.7	0.9	0.7
Susquehanna	151.2	1,061	21.9	7.1	5.9
Wyoming	53.0	379	8.3	2.6	2.1
UPSTATE PA	2,084.0	15,506.6	389.4	109.9	93.2
Percent Change	12.0%	3.6%	8.5%	9.9%	7.8%
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	14,966.7	359.0	100.0	86.5

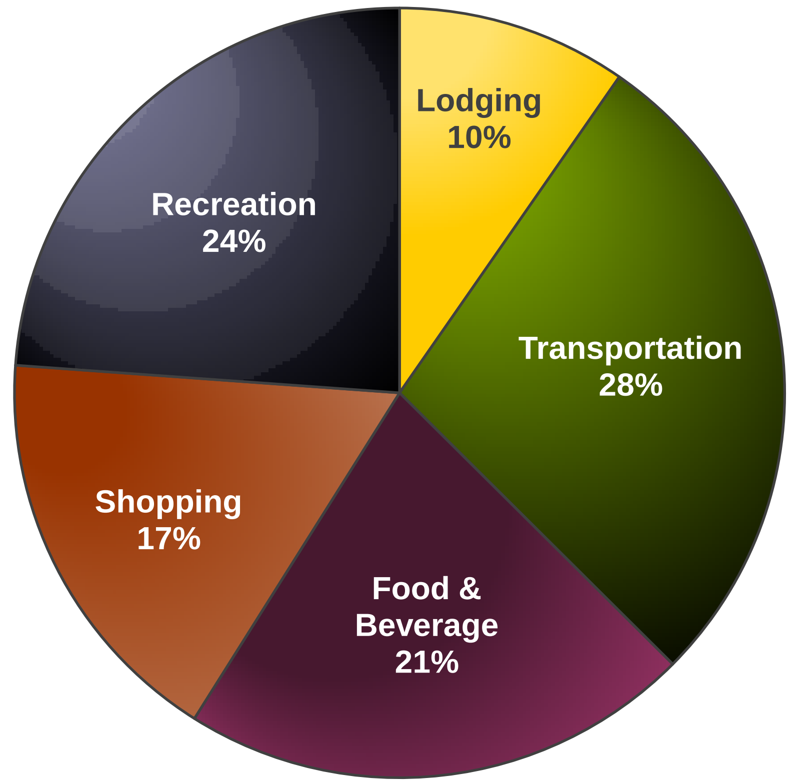
Upstate PA – Travel Economy Impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2011					
Bradford	209.8	2,124	67.3	17.2	16.3
Lackawanna	645.5	7,709	240.8	56.8	55.1
Luzerne	915.9	10,533	366.5	83.0	82.1
Schuylkill	185.2	2,350	91.8	16.5	16.5
Sullivan	19.6	226	5.9	1.6	1.5
Susquehanna	158.7	1,681	48.2	12.6	11.8
Wyoming	55.6	649	20.0	4.6	4.3
UPSTATE PA	2,190.3	25,272.3	840.5	192.3	187.7
Percent Change	11.9%	3.5%	6.8%	9.7%	7.8%
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	24,423.0	786.7	175.3	174.2

Lehigh Valley

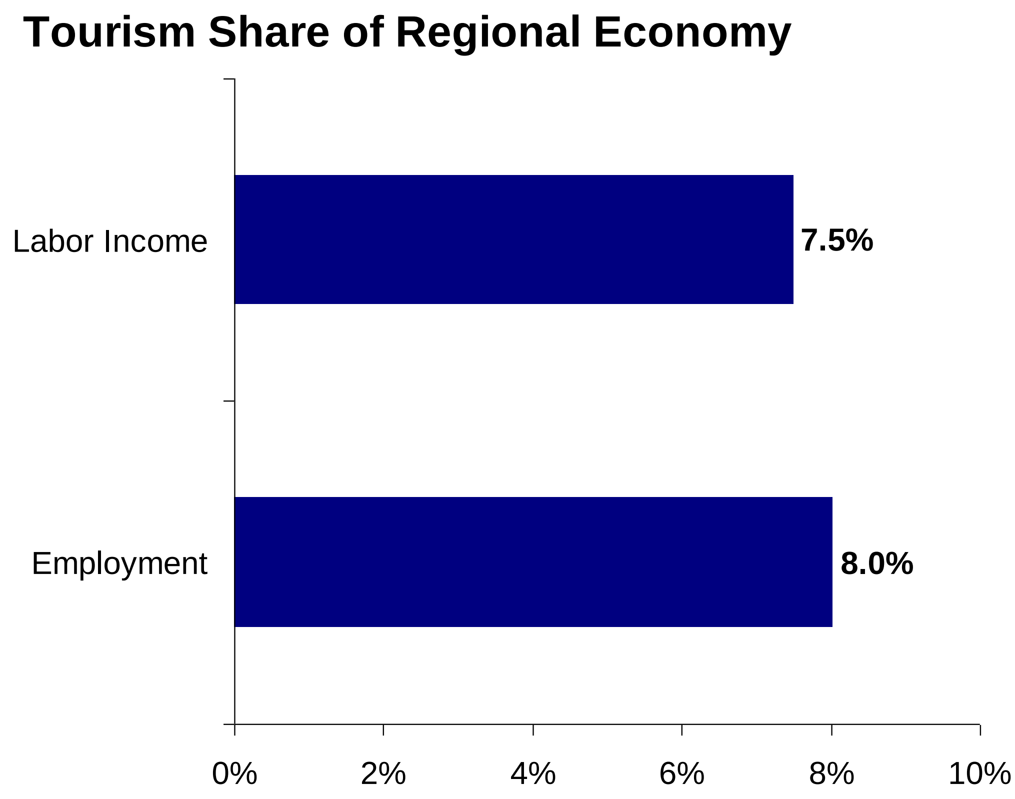
- The Lehigh Valley region is comprised the following counties: Lehigh and Northampton.
- Traveler spending in the region totaled $1.8 billion in 2011 – a nearly 16% increase from 2010.
- With a strong day-trip market and regional attractions, the Lehigh Valley region had the highest share of traveler spending on recreation spending on recreation among the state's eleven tourism regions and the lowest share on lodging.

Upstate PA Region Spending by Category



Lehigh Valley

- The chart shows the travel economy (including indirect and induced impacts) share of the total region economy.
- The 15.7% increase in traveler spending from 2010 supported the growth in labor income and employment supported by the region’s travel industry, with the share of the regional economy for labor income rising from 6.9% in 2010 to 7.5% in 2011 and the employment share growing from 7.7% to 8.0%.



Lehigh Valley - Timelines

Tourism Industry Spending (Millions of dollars)							
County	2005	2006	2007	2008	2009	2010	2011
Lehigh	867.2	891.2	952.9	1,061.4	872.1	925.4	997.6
Northampton	472.5	494.2	517.7	581.2	518.3	596.1	762.3
Lehigh Valley	1,339.7	1,385.4	1,470.6	1,642.6	1,390.4	1,521.4	1,759.8
Percent Change		3.4%	6.2%	11.7%	-15.4%	9.4%	15.7%

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

Lehigh Valley - Visitor Spending by Category

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2011						
Lehigh	99.2	231.8	194.3	190.4	281.8	997.6
Northampton	70.9	146.4	108.5	229.4	207.1	762.3
Lehigh Valley	170.1	378.2	302.7	419.8	488.9	1,759.8
Percent Change	14.9%	8.3%	7.3%	20.9%	23.9%	15.7%
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

Lehigh Valley – Tourism Satellite Account

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2011				
Lehigh	997.6	5.3	45.6	1,048.4
Northampton	762.3	3.8	34.8	800.9
Lehigh Valley	1,759.8	9.1	80.4	1,849.4
Percent Change	15.7%	3.8%	14.6%	15.6%
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

Lehigh Valley – Travel Industry Impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2011					
Lehigh	997.6	7,624	202.2	54.0	46.8
Northampton	762.3	5,816	176.2	43.4	38.8
Lehigh Valley	1,759.8	13,440.0	378.4	97.4	85.7
Percent Change	15.7%	3.4%	10.3%	12.3%	10.2%
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

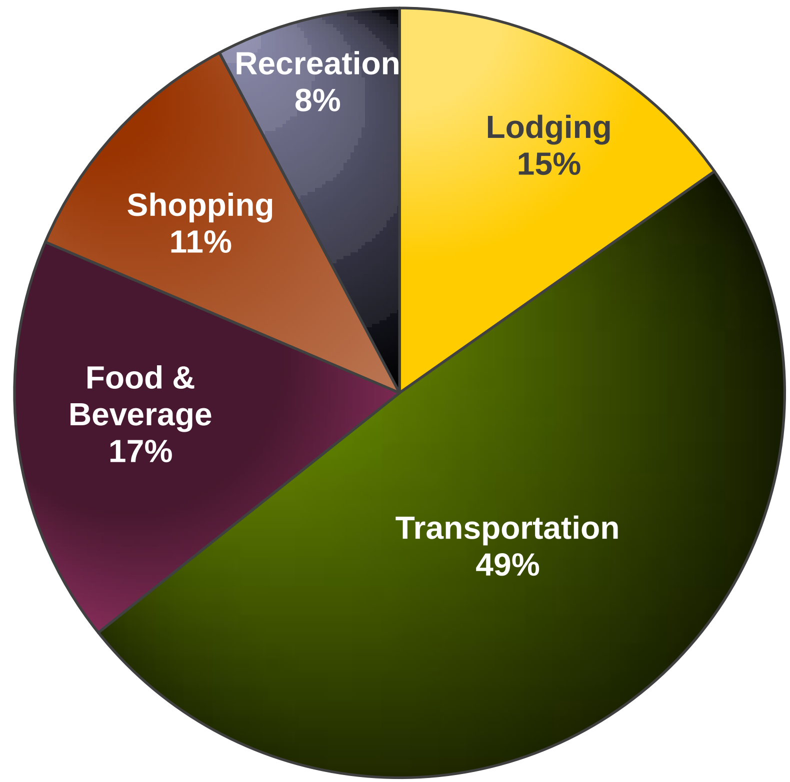
Lehigh Valley – Travel Economy Impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2011					
Lehigh	1,048.4	12,112	415.7	94.7	94.3
Northampton	800.9	9,379	356.6	76.3	78.2
Lehigh Valley	1,849.4	21,491.0	772.3	171.0	172.6
Percent Change	15.6%	3.7%	8.8%	12.2%	10.2%
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

Philadelphia & The Countryside

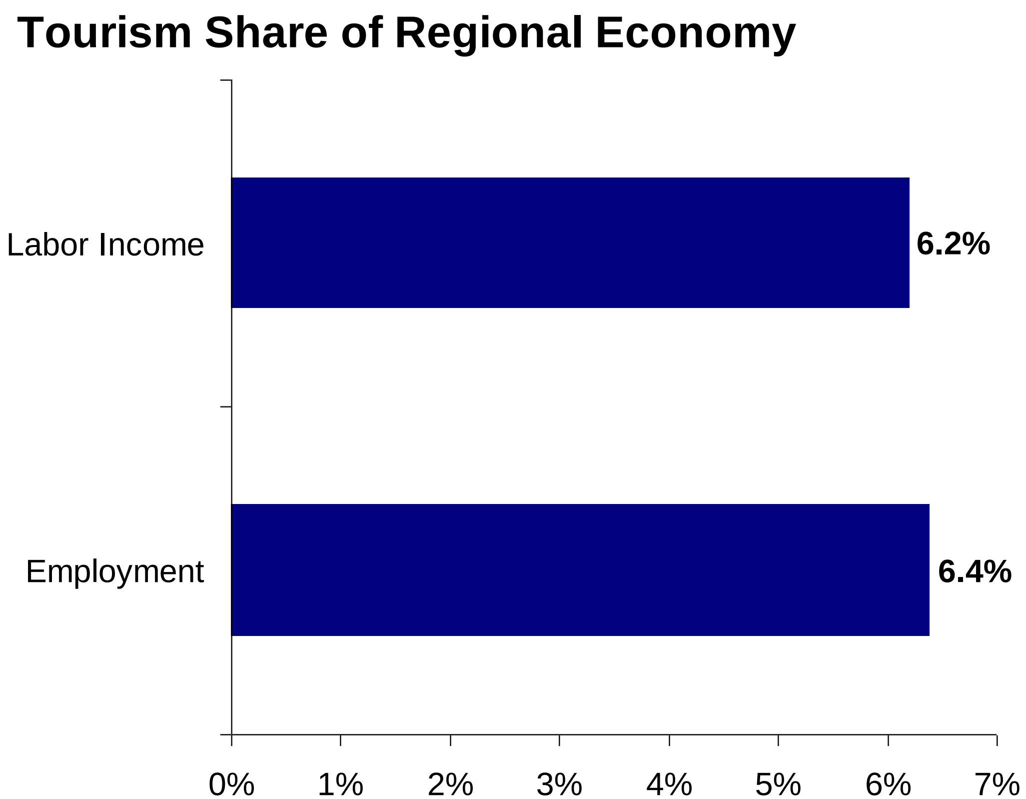
- Philadelphia and The Countryside region is comprised of the following counties: Bucks, Chester, Delaware, Montgomery, and Philadelphia.
- Travelers spent $8.6 billion in the Philadelphia & the Countryside region in 2011 – an 8.1% increase from 2010 and a new record high.
- The Philadelphia & The Countryside region had the highest shares of traveler spending on transportation and lodging, and the lowest shares on recreation, food & beverages, and shopping among the state's 11 tourism regions.

Philadelphia & The Countryside Region Spending by Category



Philadelphia & The Countryside

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total economy.
- The 8.1% increase in traveler spending contributed to slight gains in both the labor income and employment shares of the total economy supported by travel, with the labor income share growing from 6.0% in 2010 to 6.2% and the employment share rising from 6.3% to 6.4%. Despite having the largest traveler spending number, the travel industry is a smaller portion of the region's overall economy than the state's other regions.



Philadelphia & The Countryside - Timelines

Tourism Industry Spending (Millions of dollars)							
County	2005	2006	2007	2008	2009	2010	2011
Bucks	582.1	602.8	640.3	704.5	629.2	673.2	727.3
Chester	543.8	557.7	595.5	680.1	608.2	646.7	684.4
Delaware	498.1	510.7	558.2	613.9	530.4	564.5	653.6
Montgomery	985.2	1,014.0	1,079.3	1,176.2	1,014.2	1,070.8	1,178.8
Philadelphia	4,401.4	4,673.9	4,879.8	5,334.7	4,736.2	5,044.0	5,401.2
Philadelphia & The Countryside	7,010.6	7,359.0	7,753.2	8,509.5	7,518.1	7,999.1	8,645.2
Percent Change		5.0%	5.4%	9.8%	-11.7%	6.4%	8.1%

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

Philadelphia & The Countryside - Visitor Spending by Category

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2011						
Bucks	114.4	162.4	102.8	81.2	266.5	727.3
Chester	119.5	150.9	95.6	73.7	244.6	684.4
Delaware	85.4	137.3	87.0	73.7	270.2	653.6
Montgomery	271.1	224.6	142.2	84.4	456.5	1,178.8
Philadelphia	727.2	804.5	509.5	356.8	3,003.2	5,401.2
Philadelphia & The Countryside	1,317.6	1,479.7	937.1	669.8	4,241.1	8,645.2
Percent Change	10.7%	5.6%	7.4%	3.9%	9.0%	8.1%
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

Philadelphia & The Countryside – Tourism Satellite Account

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2011				
Bucks	727.3	4.6	33.2	765.1
Chester	684.4	3.7	31.3	719.3
Delaware	653.6	3.4	29.9	686.8
Montgomery	1,178.8	6.9	53.9	1,239.6
Philadelphia	5,401.2	57.8	246.9	5,705.8
Philadelphia & The Countryside	8,645.2	76.4	395.2	9,116.7
Percent Change	8.1%	-0.3%	7.0%	8.0%
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

Philadelphia & The Countryside – Travel Industry Impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2011					
Bucks	727.3	8,568	239.3	49.2	47.0
Chester	684.4	6,879	212.6	44.4	42.4
Delaware	653.6	6,936	232.2	45.7	44.6
Montgomery	1,178.8	12,337	394.8	80.1	77.1
Philadelphia	5,401.2	32,669	1,557.7	370.5	318.2
Philadelphia & The Countryside	8,645.2	67,389.8	2,636.6	589.9	529.3
Percent Change	8.1%	1.7%	4.5%	5.7%	3.9%
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

Philadelphia & The Countryside – Travel Economy Impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2011					
Bucks	765.1	15,102	551.8	86.5	94.9
Chester	719.3	12,005	468.8	78.4	85.7
Delaware	686.8	12,438	514.7	80.6	90.1
Montgomery	1,239.6	21,373	854.4	141.0	155.7
Philadelphia	5,705.8	52,802	2,872.9	629.0	642.2
Philadelphia & The Countryside	9,116.7	113,720.5	5,262.6	1,015.4	1,068.7
Percent Change	8.0%	1.8%	3.9%	5.4%	3.9%
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

Methodology and Data Sources

TOURISM ECONOMICS

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Methodology and data sources

- Domestic visitor expenditure estimates are provided by Longwoods International representative survey of US travelers. These are broken out by sectors (lodging, transport at destination, food & beverage, retail, and recreation), by purpose (business and leisure), and by length of stay (day and overnight).
- Tourism Economics then adjusts these levels of spending based on a range of known measures of tourism activity:
  - Overseas visitor spending (source: OTTI, TE)
  - Canada visitor spending (source: Statistics Canada, TE)
  - Local room tax receipts (source: PA Tourism Office as reported by county treasurer's offices)
  - State Sales tax receipts by sector and county (source: Pa Tourism Office as reported by PA Revenue Department)
  - 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, Gross Domestic Product, 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 traveler-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 Bureau (business sales by industry)
- The source of the employment and wage data is the Regional Economic Information System (REIS), Bureau of Economic Analysis, U.S. Department of Commerce. All employment rankings are based on 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.

Selected recent economic impact clients

Associations / Companies

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

DMAI (Event Impact Calculator for 80 CVBs)

US Travel Association (Impact of travel promotion)

InterContinental Hotels

States

California

Georgia

Maryland

New York

North Carolina

Ohio

Pennsylvania

Wisconsin

Cities

Baltimore, MD

Columbus, OH

Kansas City, MO

London, United Kingdom

New York City

Omaha, NE

Orlando, FL

Philadelphia, PA

Pittsburgh, PA

Rockford, IL

Countries / Provinces

Bahamas

Bermuda

Cayman Islands

Dubai

Ontario Canada

St. Lucia

United Kingdom

About Tourism Economics

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

TOURISM ECONOMICS

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For more information:

Adam Sacks, Managing Director

adam@tourismeconomics.com

Christopher Pike, Senior Economist

cpike@tourismeconomics.com