

# The Economic Impact of Travel in Pennsylvania

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Tourism Satellite Account  
Calendar Year 2014



TOURISM  
ECONOMICS

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# State Overview



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# Recent trends

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- Spending by Pennsylvania travelers and tourists grew for the fifth straight year in 2014, albeit at the slowest rate of increase (1.2%) in the past decade (*excluding the steep drop in 2009 from the Great Recession*). Total traveler spending (presented at times in the report as “*travel & tourism industry sales*”) grew to \$39.7 billion in 2014, up from \$39.2 billion in 2013.
  - The number of travelers visiting Pennsylvania was essentially unchanged from 2013 with 192.8 million domestic and international visitors traveling to and/or within Pennsylvania in 2014.
  - Overnight visitation showed a modest increase with the number of hotel room nights sold (i.e., demand) up 1.7% compared to 2013.
  - Per trip spending increased slightly – a combination of higher prices, especially for lodging, as well as improved consumer confidence and travelers’ willingness to spend more at restaurants, attractions, and retail establishments.
- Traveler spending generated an estimated \$69.6 billion in total economic activity (including indirect and induced impacts) throughout all industries in Pennsylvania in 2014 – a 1.8% increase from 2013.

# Key results

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- Travel and tourism-related economic activity supported 482,524 PA jobs in total (*i.e., includes direct, indirect and induced jobs*) in 2014, a slight increase (0.7%) from 2013 and equal to 6.5% of the state's total employment count.
- After outpacing the state's average employment growth rate for all non-farm industries over the past several years, the growth rate for travel-related and supported jobs in 2014 matched the state average.
- The state's travel and tourism sector was directly responsible for an estimated \$16.9 billion of the state's 2014 Gross Domestic Product (GDP) – a 3.5% increase from 2013.
- Including indirect and induced impacts, PA's travel and tourism industry generated \$4.2 billion in state and local taxes and \$4.3 billion in federal taxes in 2014.

On average, the  
spending of every 400  
travelers to and/or within  
supports one PA job.

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

**Why quantify the tourism economy**

**Challenges in measuring tourism economy**

**Explanation of Tourism Satellite Account (TSA)**

**Key definitions**



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# Why quantify the tourism economy?

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

# Why is this a challenge?

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



# The Tourism Satellite Account

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

# Benefits of the Tourism Satellite Account

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Benefits of using the TSA methodology include:

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

# Key definitions

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

# Key definitions

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

# Key definitions

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

# Key definitions

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

# Spending Impacts



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

## *Businesses Catering to the Traveling Public*



Wages  
paid to  
employees

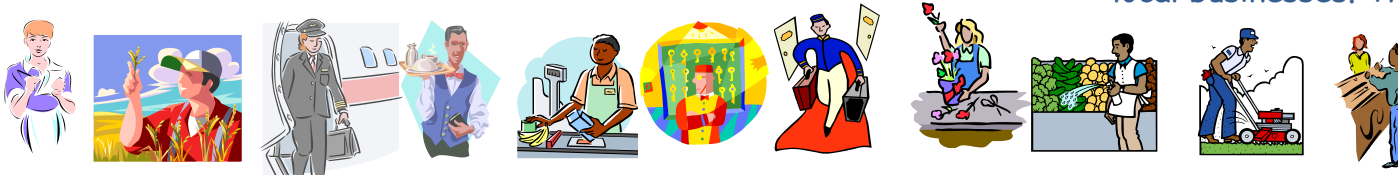


The businesses that directly cater to the traveling public purchase a wide variety of goods and services from suppliers, manufacturers, and service companies. This is the **indirect impact**.

## *Manufacturers, Supplier and Support Businesses*



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



# Illustrating the concepts

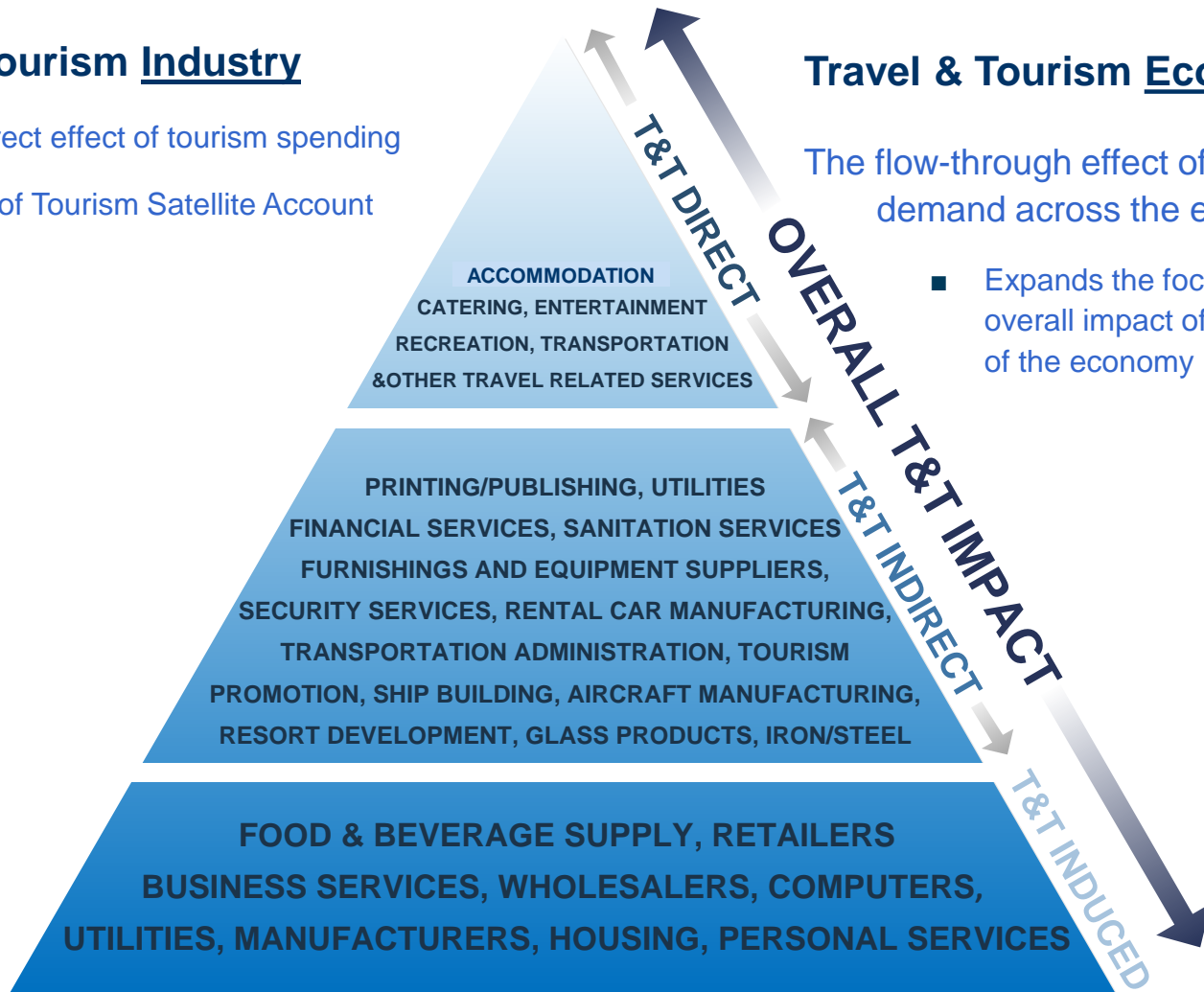
## Travel & Tourism Industry

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

## Travel & Tourism Economy

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

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





# **Detailed State Results**

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



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# Key travel trends in 2014

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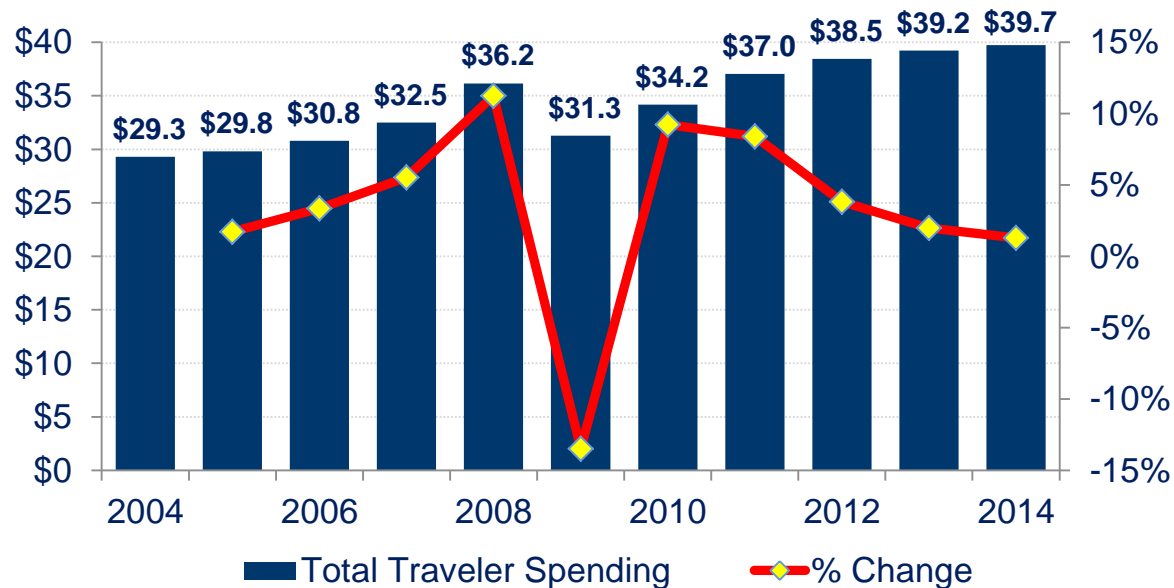
- Travel and tourism continued to be an integral component of the PA economy, with visitor spending (*aka “industry sales”*) directly injecting \$39.7 billion into the economy in 2014 – a 1.2% increase from 2013 and a new record high.
- Much of the increase was the result of greater spending by individual travelers since there was little change in the total number of travelers from 2013.
- A drop in transportation costs largely contributed to the increase in spending for other categories of traveler spending in 2014 – categories that typically have a greater impact on the overall economy.
- Spending increases were strongest in the lodging (4.7%) and food & beverage sectors (3.5%). The increased spending on lodging was largely due to rate increases, while travelers appeared to splurge a little on their food and beverage purchases.

# Continued modest growth in PA traveler spending

- Pennsylvania's total visitor spending (i.e., spending by both domestic and international travelers) reached \$39.7 billion in 2014 – a new record high.
- 2014 marked the fifth straight year of increases in traveler spending amid modest gains in visitation.
- 2014 also marked the first time since 2009 that the growth in spending by PA's overnight travelers (1.3%) outpaced that of the day-trip segment (1.1%).

## Total traveler spending in Pennsylvania

(in billions of U.S. dollars)



*Includes spending by both domestic and international travelers*

*Source: Tourism Economics*

# PA 2014 traveler spending by market segment

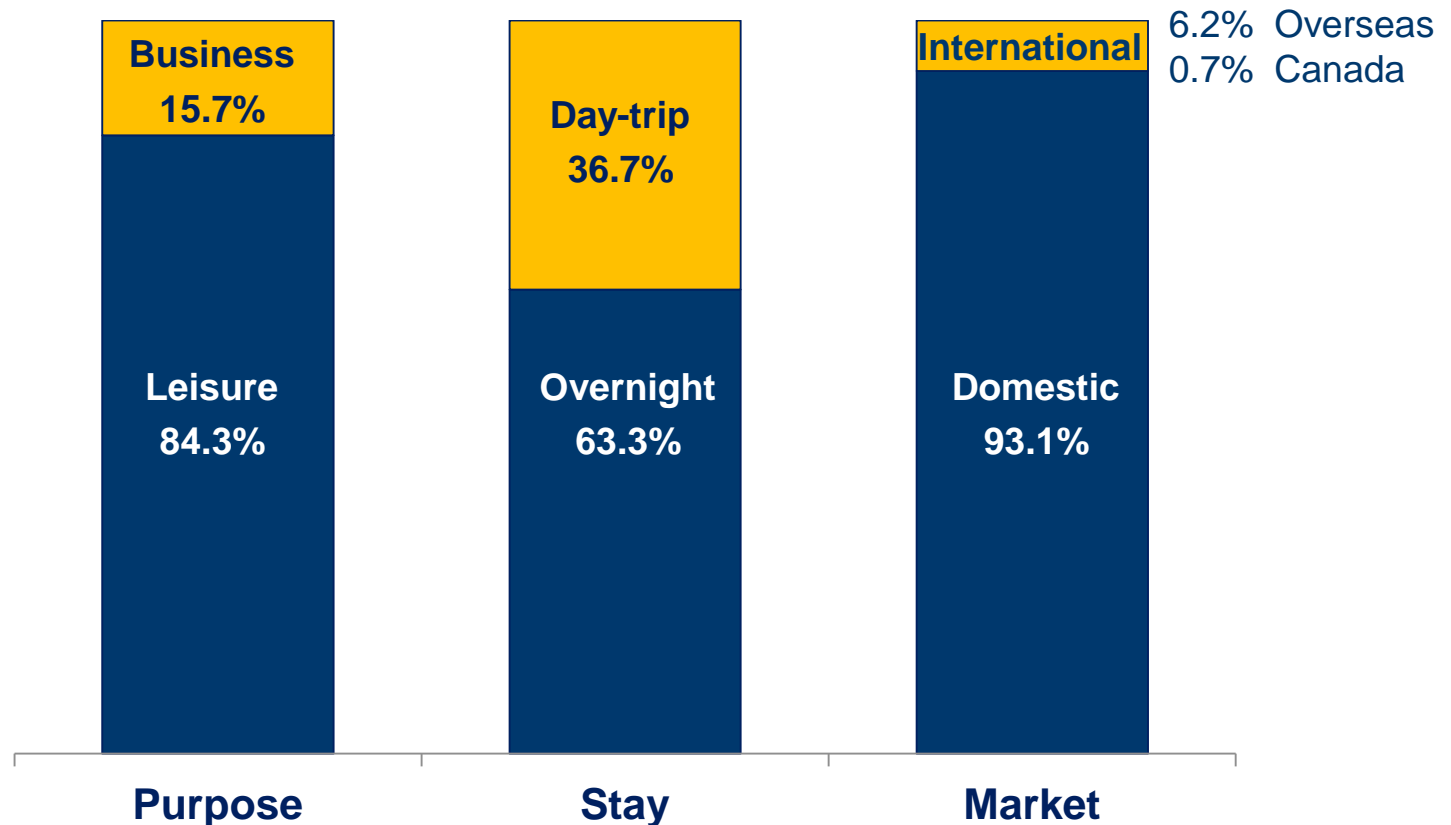
- With spending by business travelers down slightly again, the rate of increase in spending by PA's leisure travel segment was stronger than that of the business travel segment in 2014.
- While the growth rate in spending by PA's overnight segment was just slightly above that of the day-trip segment, total spending by overnight travelers was \$10.6 billion more than that of the state's day-trip travelers, accounting for 63% of the state's total traveler spending in 2014.

2014 Traveler Spending* by Segment (in billions of U.S. dollars)					
Purpose		Stay		Market	
Leisure	\$33.5	Overnight	\$25.2	U.S. Domestic	\$37.0
Business	\$ 6.2	Day-trip	\$14.6	Overseas	\$ 2.4
				Canada	\$ 0.3
<b>Total</b>	<b>\$39.7</b>	<b>Total</b>	<b>\$39.7</b>	<b>Total</b>	<b>\$39.7</b>
Growth Rate					
Leisure	1.6%	Overnight	1.3%	U.S. Domestic	1.2%
Business	-0.5%	Day-trip	1.1%	Overseas	3.2%
<b>Total</b>	<b>1.2%</b>	<b>Total</b>	<b>1.2%</b>	Canada	-6.3%
Market Share					
Leisure	84.3%	Overnight	63.3%	U.S. Domestic	93.1%
Business	15.7%	Day-trip	36.7%	Overseas	6.2%
				Canada	0.7%

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

# Distribution of traveler spending by market segment

- As in previous years, U.S. domestic, total leisure, and total overnight travel remained the dominant segments for PA's travel and tourism industry in 2014.  
*(Note: The estimates for international travel have been revised downward from those presented in prior reports as additional data has become available.)*



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

# Traveler spending by visitor type, 2013 & 2014

- The increase in total traveler spending in 2014 was derived solely from leisure travel, with spending by business travelers down slightly (-0.5%) from 2013.
- The drop in business traveler spending was completely due to the day-trip segment, with spending by overnight business travelers rising 4.1% – the strongest of the four travel segments.

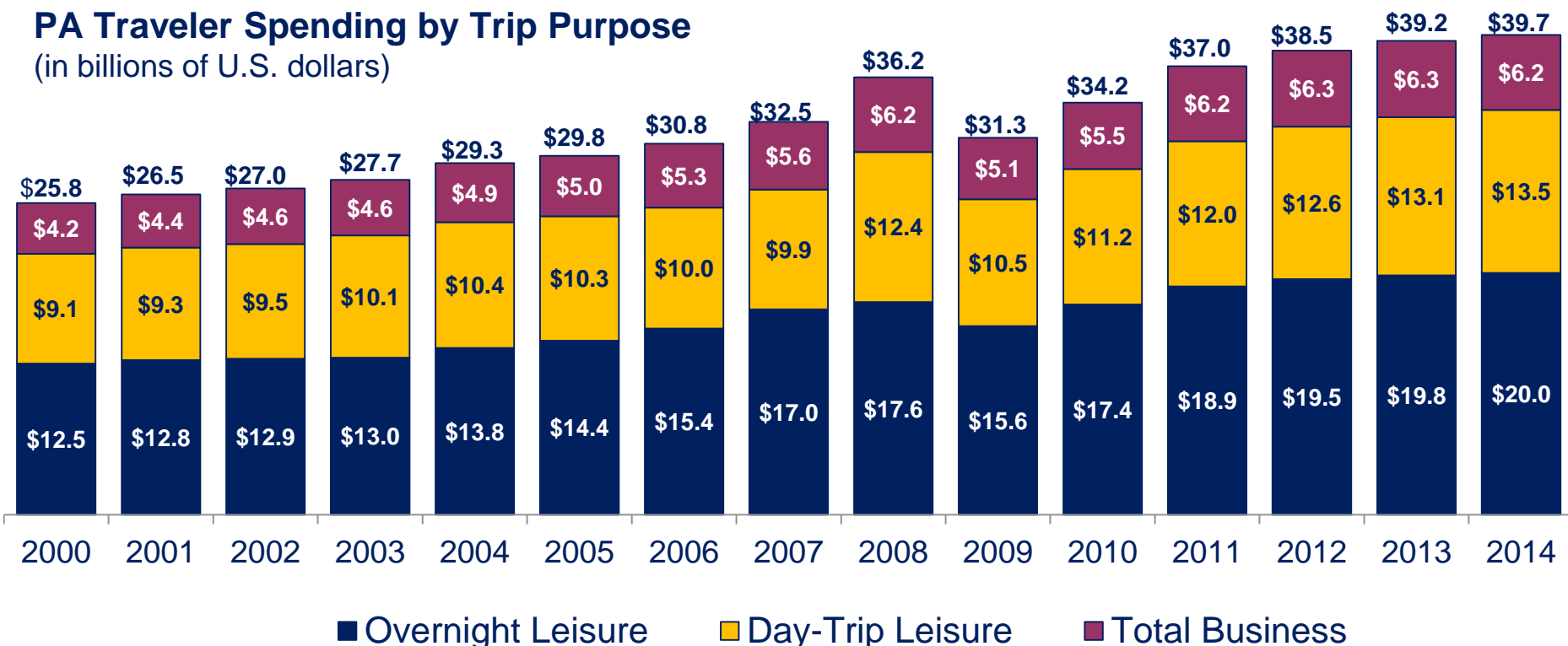
Traveler Spending by Visitor Type (in billions of U.S. dollars)			
2014	Leisure	Business	Total
Overnight	\$20.0	\$5.2	\$25.2
Day-Trip	\$13.5	\$1.1	\$14.6
Total	\$33.5	\$6.2	\$39.7
2013			
Overnight	\$19.8	\$5.0	\$24.8
Day-Trip	\$13.1	\$1.3	\$14.4
Total	\$32.9	\$6.3	\$39.2
Percent Change			
Overnight	0.6%	4.1%	1.3%
Day-Trip	3.0%	-18.1%	1.1%
Total	1.6%	-0.5%	1.2%

# Total traveler spending by trip purpose, 2000 - 2014

- The overnight segment – both leisure and business – drove much of the increase in total traveler spending in 2014 accounting for an estimated 80% of the increase in total dollars spent by travelers.
- The business day-trip segment was the only travel segment to experience a decrease in traveler spending in 2014, dropping an estimated \$200 million, or 18.1%, from 2013.

## PA Traveler Spending by Trip Purpose

(in billions of U.S. dollars)



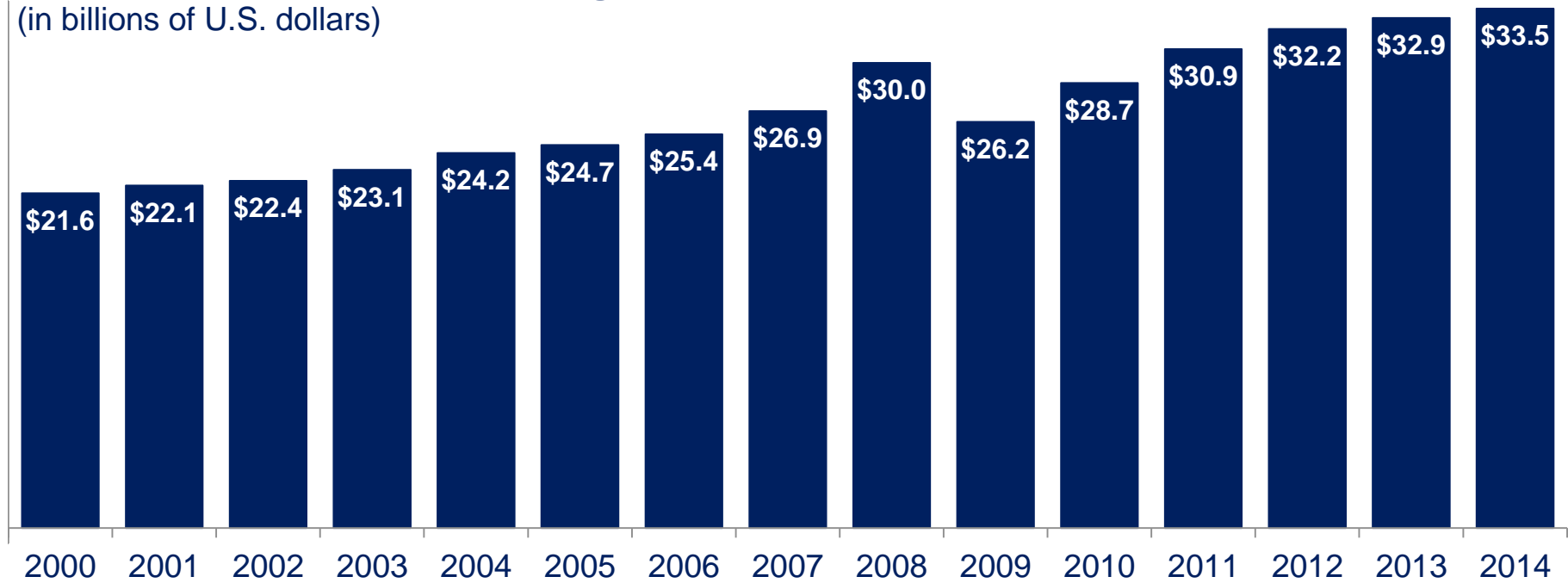
Source: Tourism Economics

# Total leisure traveler spending, 2000 - 2014

- Total leisure traveler spending grew by \$0.6 billion in 2014, or 1.6%, to reach a new record high of \$33.5 billion (in dollars not adjusted for inflation).
- As in the two prior years, both overnight and day-trip leisure segments registered increases in 2014, but the strongest increase in both dollar and percentage terms was by the day-trip segment.

## Total leisure traveler spending

(in billions of U.S. dollars)



Source: *Tourism Economics*

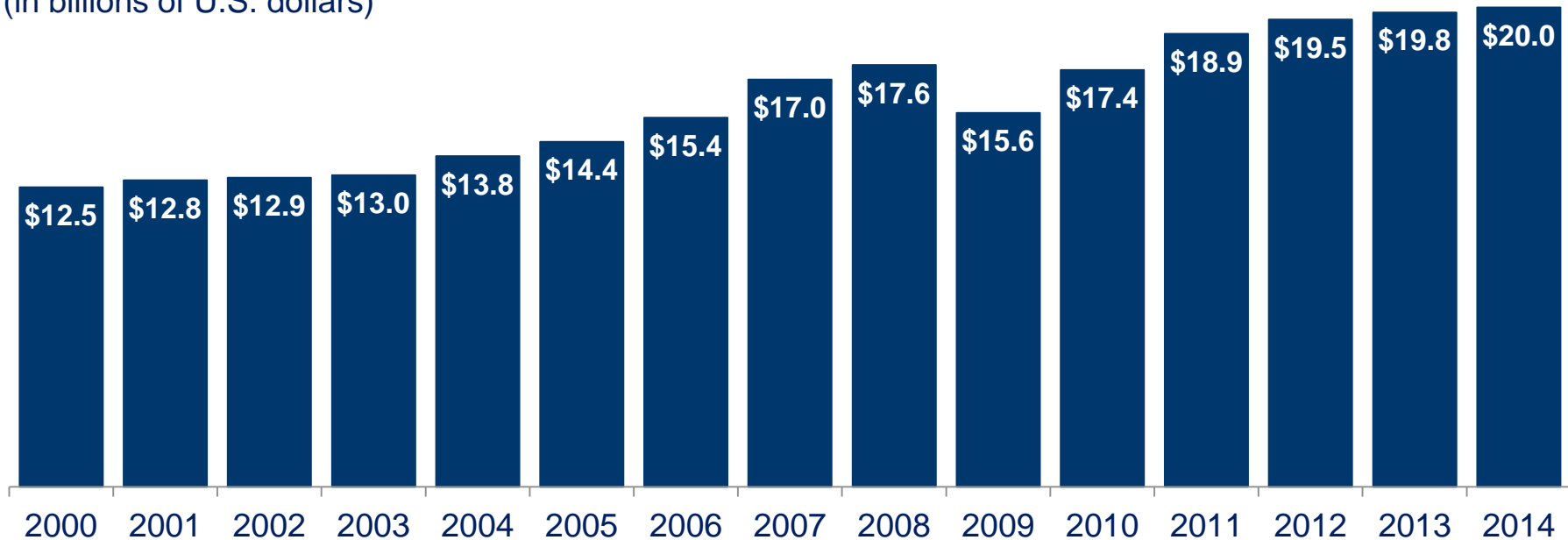


# Overnight leisure traveler spending, 2000 - 2014

- Spending by PA's overnight leisure travelers rose 0.6% in 2014 – the segment's third year of subdued growth.
- Nevertheless, total spending by the state's overnight leisure travelers reached a new record high in 2014 (in non-inflation-adjusted dollars).

## **Total overnight leisure traveler spending**

(in billions of U.S. dollars)



Source: *Tourism Economics*

# 2014 Traveler spending by spending category

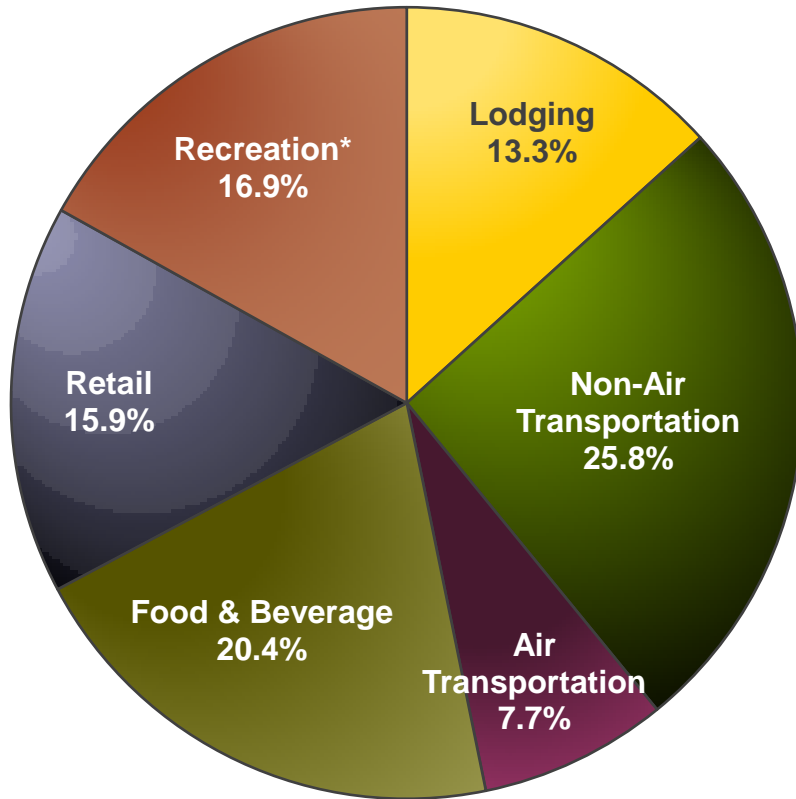
- Total visitor spending rose 1.2% in 2014 – a rate of increase well below that of the post-recession years and the slowest pace in at least the past 10 years. With only a marginal increase in the number of travelers, the increase was primarily due to an increase in spending by individual travelers.
- The strongest increases in both dollar and percentage terms in 2014 were in the food & beverage and lodging categories. The increase in lodging was largely driven by rate increases, while travelers appeared to splurge a bit more on their food and beverage purchases since inflation remained relatively subdued.

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

Sector	2008	2009	2010	2011	2012	2013	2014	% Change
Non-Air Transportation	\$9,212	\$7,970	\$8,803	\$10,076	\$10,525	\$10,598	\$10,249	-3.3%
Food & Beverage	\$7,442	\$6,602	\$7,084	\$7,400	\$7,529	\$7,822	\$8,093	3.5%
Recreation	\$5,637	\$4,971	\$5,666	\$6,133	\$6,365	\$6,570	\$6,700	1.9%
Retail	\$6,079	\$5,145	\$5,551	\$5,811	\$6,110	\$6,165	\$6,324	2.6%
Lodging	\$4,604	\$4,046	\$4,380	\$4,792	\$4,955	\$5,047	\$5,283	4.7%
Air Transportation	\$3,180	\$2,544	\$2,681	\$2,821	\$2,968	\$3,017	\$3,066	1.6%
<b>TOTAL</b>	<b>\$36,154</b>	<b>\$31,278</b>	<b>\$34,165</b>	<b>\$37,034</b>	<b>\$38,453</b>	<b>\$39,224</b>	<b>\$39,714</b>	<b>1.2%</b>
% Change	---	-13.5%	9.2%	8.4%	3.8%	2.0%	1.2%	

# 2014 Traveler spending by spending category

## Distribution of total PA traveler spending



*Includes spending by both domestic and international travelers.*

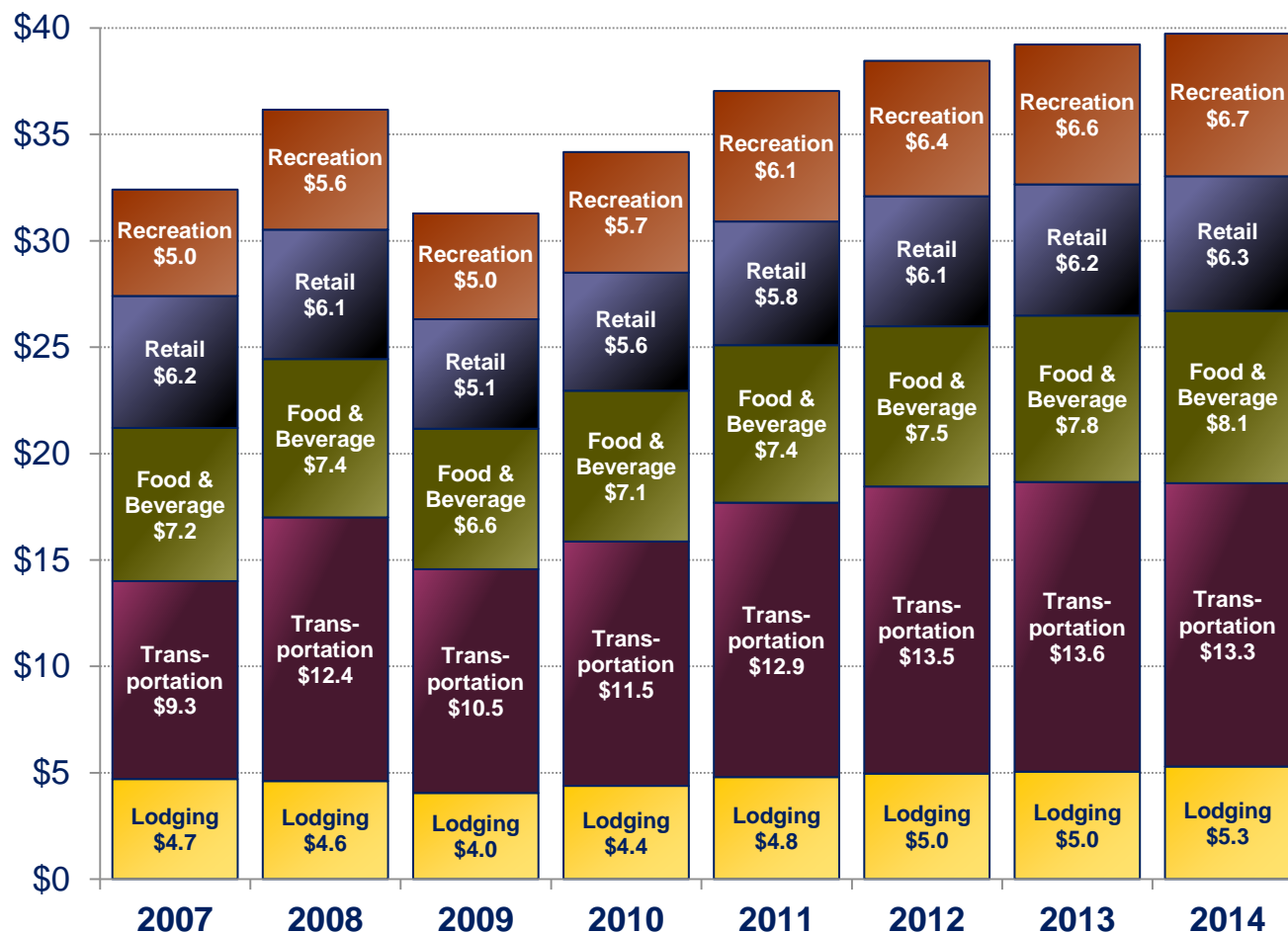
“Recreation” includes spending at attractions and on activities including both indoor (e.g., bowling) and outdoor (e.g., hiking).

Source: *Tourism Economics*

- There were a number of small shifts in traveler spending in PA in 2014. Travelers spent relatively more of their travel budgets on all types of goods and services except transportation, where its share of total traveler spending fell 1.2 percentage points from 2013 as the cost of fuel declined.
- Nevertheless, total spending on air and all other transportation combined accounted for more than a third of traveler spending in 2014 -- down from 2012's peak of 35.1% and 34.7% in 2013.
- Lodging costs accounted for 13% of total traveler spending – the category's highest share since at least 2008 reflecting the strong rate increases the industry has enjoyed with the improvement in the overall economy.

# PA Traveler spending by spending category

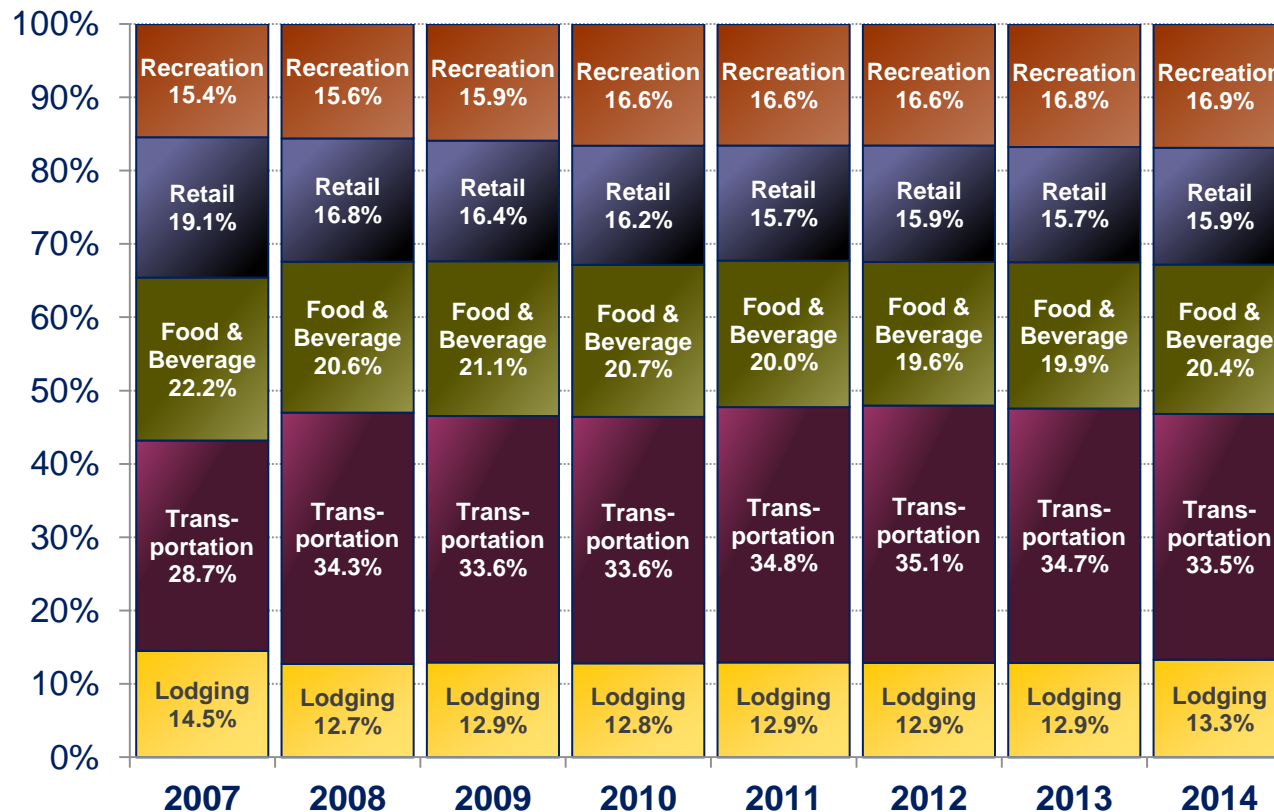
In billions of U.S. dollars



- Travelers continued to dedicate an increasing share of their travel budgets to recreation goods and services, with the sector growing by over \$1 billion, or almost 20%, between 2008 and 2014.
- The drop in fuel prices enabled travelers to spend more of their trip dollars on dining, retail, lodging, and recreation.
- With the exception of transportation, traveler spending for all other categories reached new record high levels (*in nominal dollars*) in 2014.

Source: *Tourism Economics, Longwoods International, U.S. Office of Travel & Tourism Industries*

# Share of total traveler spending by category



- While traveler spending on transportation declined in 2014, the sector still claimed a third of traveler dollars or roughly the same proportion as 2009 and 2010.
- The share of traveler dollars going to the recreation segment continued its steady climb, with spending on recreational goods and services in 2014 at its highest level since at least 2007.

*Includes spending by both domestic and international travelers.*

*Source: Tourism Economics, Longwoods International, U.S. Office of Travel & Tourism Industries*

# The Domestic Travel Market in Detail

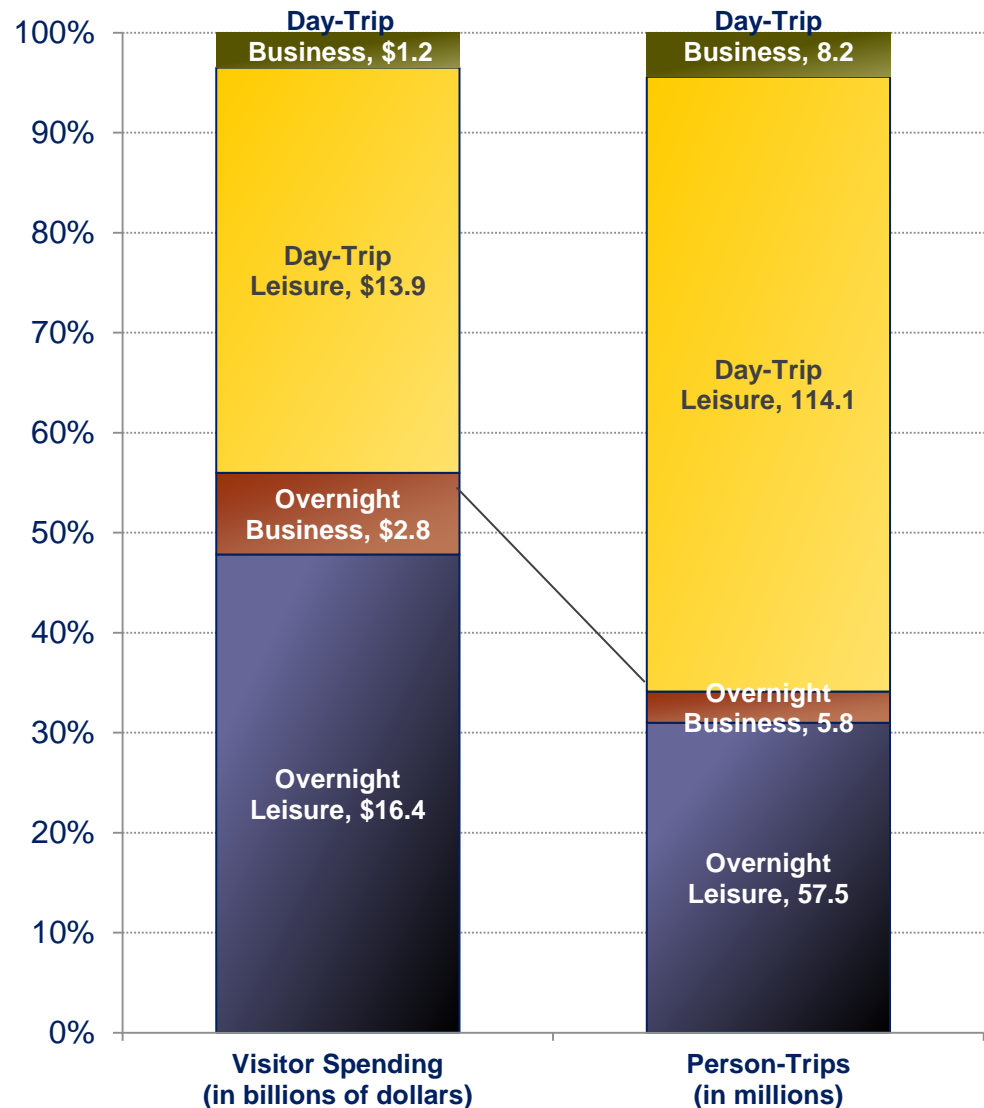
# Domestic visits and traveler spending

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- Pennsylvania hosted an estimated 190.4 million U.S. travelers in 2014 (*as measured in “person-trips”*) – a 0.3% increase and the same percentage increase as in 2013.
- Overnight visits grew 1.0% to 65.4 million person-trips.
- The number of day-trip travelers was unchanged at 125.0 million person-trips.
- Domestic visitor spending in PA rose 2.2% to \$34.4 billion in 2014. (*It is important to note this figure and the following charts do not include the trip-related costs incurred by out-of-state travelers getting to and from Pennsylvania, but are nonetheless attributable to PA (e.g., gasoline bought out-of-state by a person who then travels into and within PA and then home again, or the portion of an airline ticket attributable to just the part of the flight that occurs in PA. The following tables are based on traveler survey responses that do not apportion the amount of airline tickets or gas purchase attributable to each state.)*)
- Per person trip spending rose 1.9% overall, or an increase of \$10 - \$11 per traveler depending on the travel segment.
- With the number of person-trips showing only marginal growth, most of the increase in PA's 2014 total domestic spending was the result of higher spending levels of individual travelers.

# 2014 Domestic traveler spending vs. person-trips

- This chart compares the relative shares of spending and person-trips for the four major trip types, i.e., overnight leisure, day-trip leisure, overnight business, and day-trip business. Note: Data for travelers whose trip was for both business and leisure purposes is not included in this chart.
- The Overnight Leisure segment accounted for 30% of all person-trips, but a far higher share (48%) of PA's total domestic visitor spending in 2014, while the Day-Trip Leisure segment accounted for 60% of domestic person-trips but 41% of total spend.



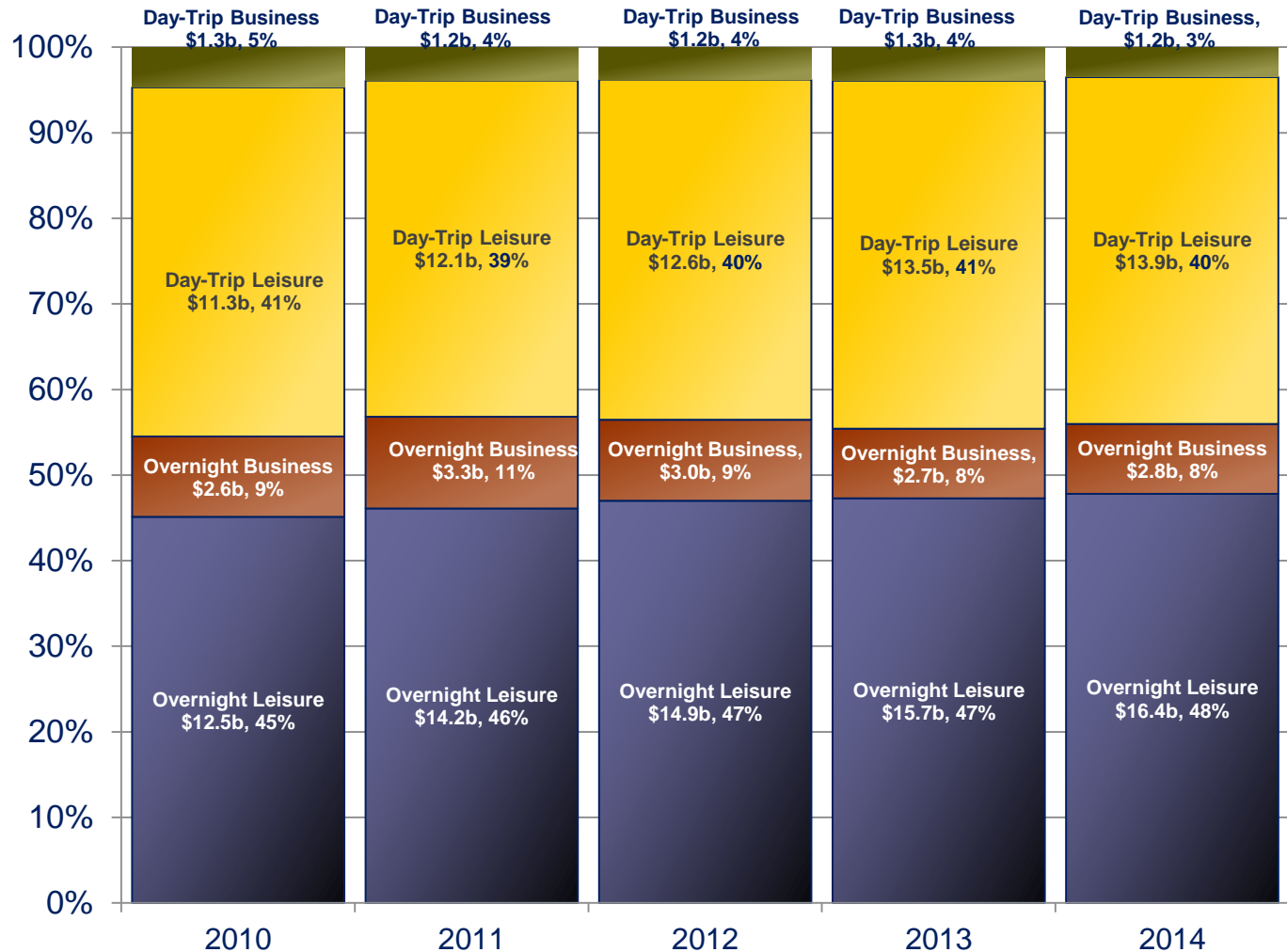


# Domestic spending trends by trip type

- The share of overnight leisure spending rose to 48% in 2014 – the highest percentage since at least 2010.
- The share of U.S. leisure day-trip traveler spending was 40% in 2014.
- An estimated 56% of domestic traveler spending was by overnight travelers (business and leisure combined).
- Note: Chart does not include data on those whose trip was for both leisure and business.

## Domestic traveler spending by trip type

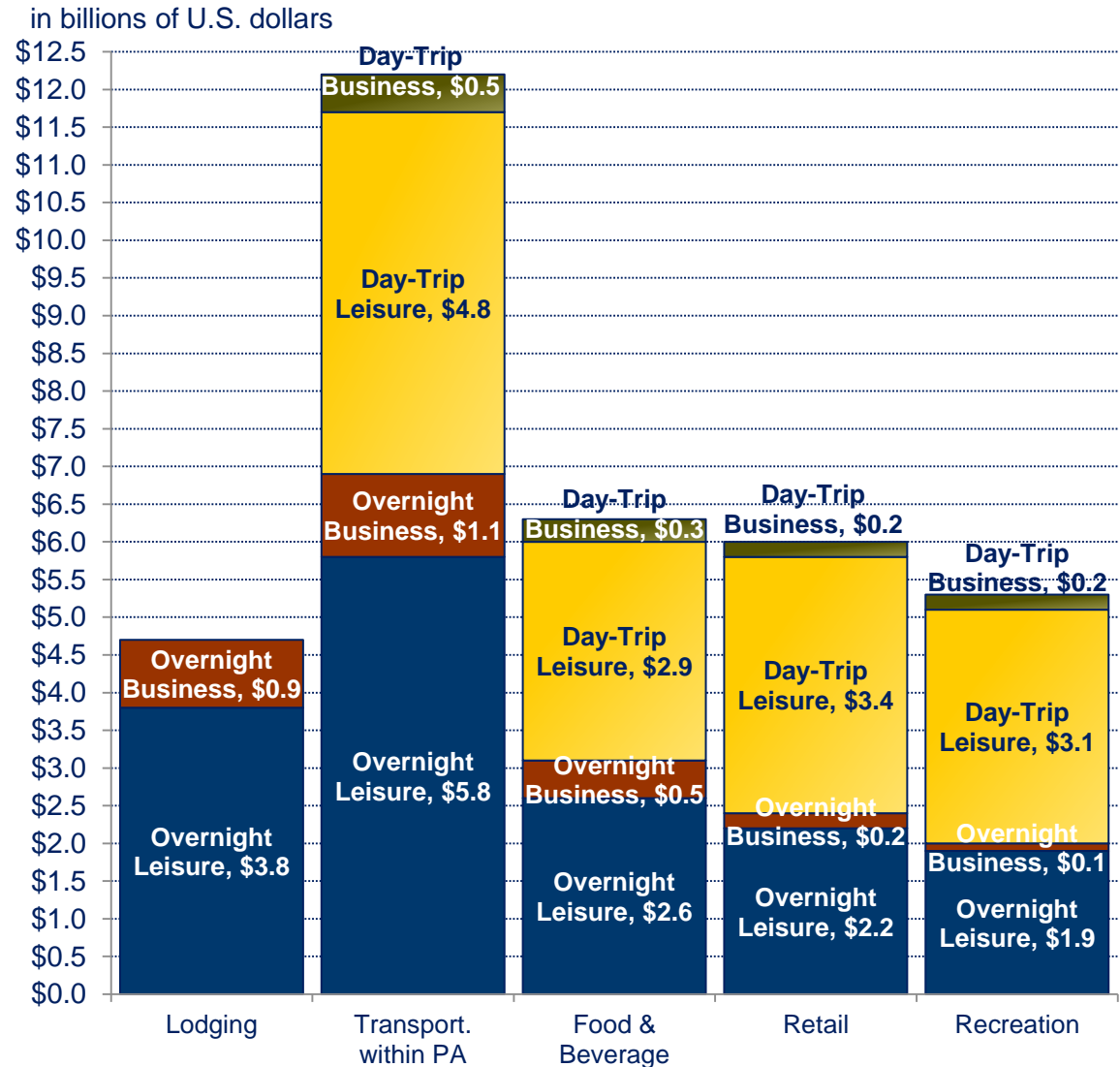
In billions of U.S. dollars and as Percent of total spending



Source: Longwoods International

# 2014 Domestic traveler spending by spending category and trip type

- Leisure travelers accounted for 81% of PA's total 2014 domestic traveler spending on lodging.
- Business overnight's 19% share of lodging spending was far higher than the segment's 10% share of PA's total overnight person-trips, with lodging accounting for just under a third of the segment's total spend in 2014.
- Day-trip leisure visitors accounted for 58% of all domestic visitor spending on recreation in PA in 2014.

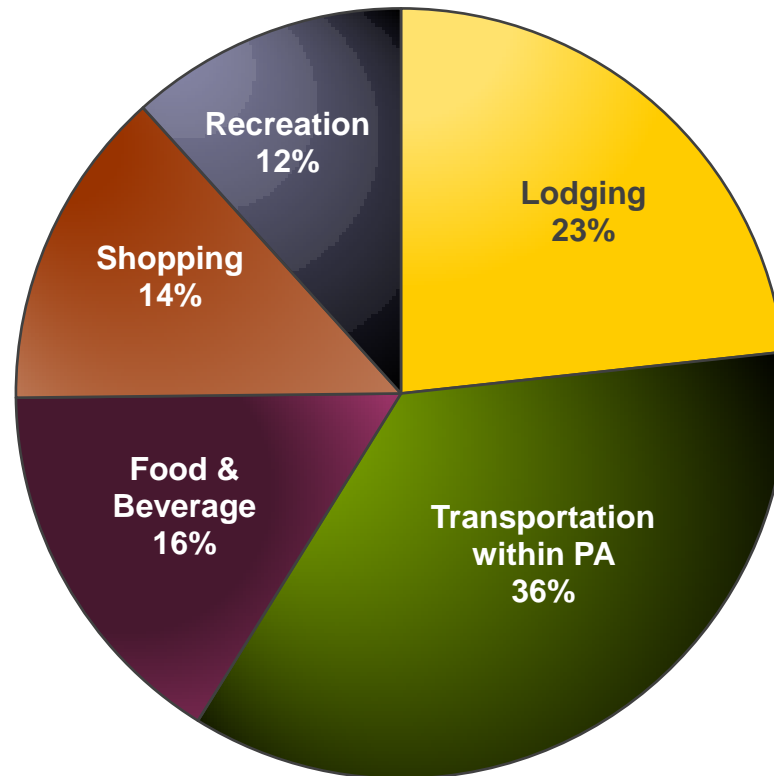


Source: Longwoods International

# Overnight leisure traveler spending by category

- Pennsylvania hosted an estimated 57.5 million domestic overnight leisure travelers in 2014 (as measured in person-trips).
- These visitors spent an estimated \$16.4 billion in PA in 2014 – a \$0.7 billion increase from 2013.
- Each visitor spent an estimated \$285 per trip.
- Lodging and transportation together accounted for close to 60% of the segment's total expenditures, or roughly \$10 billion.

**2014 Domestic Overnight Leisure Traveler Spending by Category**

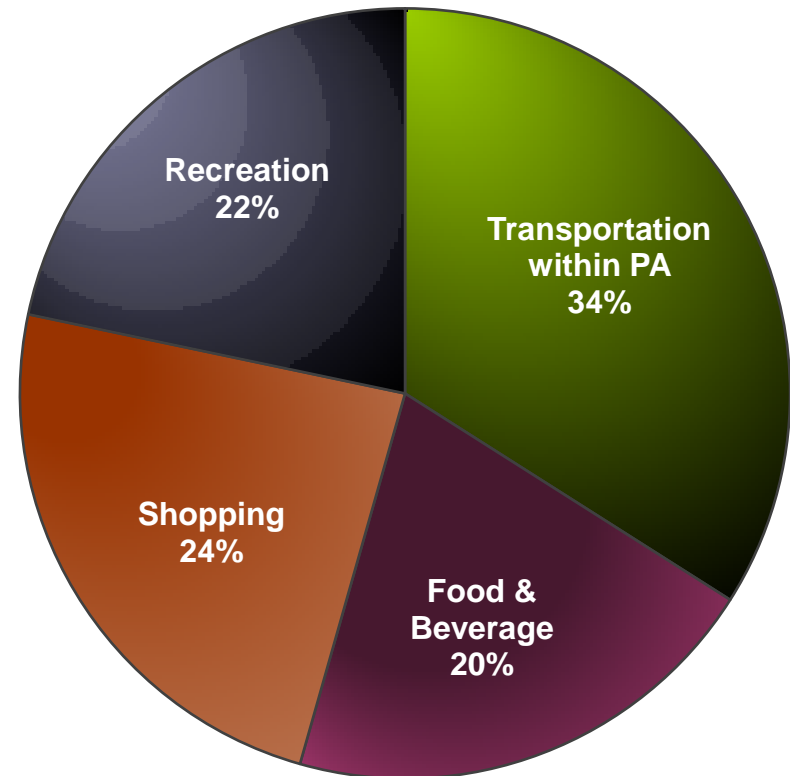


Source: Longwoods International

# 2014 Day-trip leisure traveler spending by category

- PA hosted an estimated 114.1 million day-trip leisure travelers (as measured in person-trips) in 2014.
- These visitors spent an estimated \$13.9 billion in Pennsylvania in 2014.
- Each visitor spent an average of \$122 per trip in 2014.
- Day-trip leisure travelers spent almost two-thirds of their trip dollars on recreation, shopping, and food and beverage purchases in 2014.

**2014 Domestic Day-Trip Leisure Traveler Spending by Category**

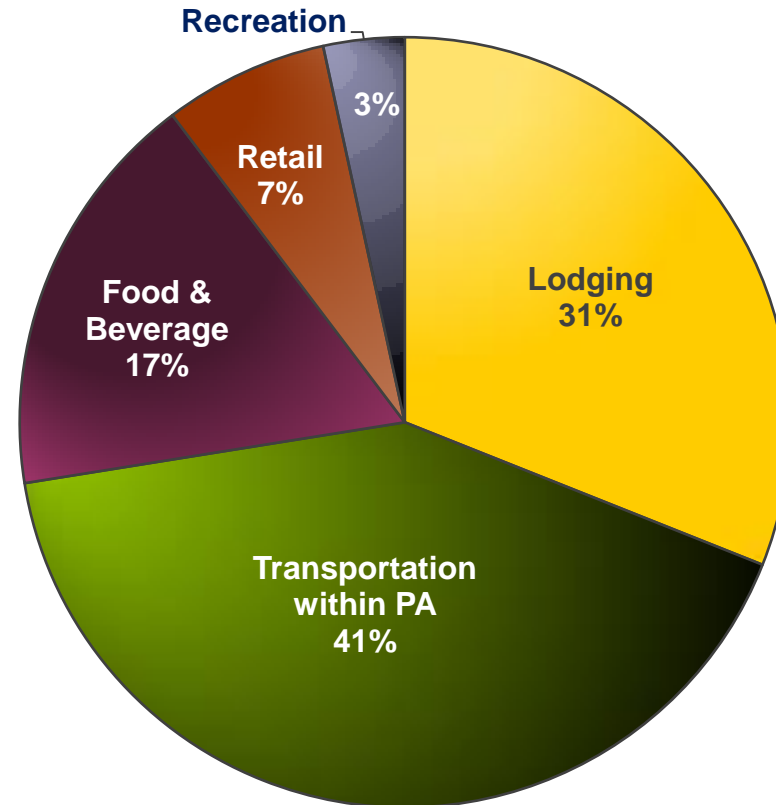


Source: Longwoods International

# 2014 Overnight business traveler spending by category

- PA hosted an estimated 5.8 million domestic overnight business travelers in 2014 (as measured in person-trips).
- These visitors spent an estimated \$2.8 billion in Pennsylvania in 2014.
- Each visitor spent an average of \$478 per trip – the highest of any trip type, with transportation and lodging together accounting for almost three-fourths of the segment's total trip expenditures.

## 2014 Domestic Overnight Business Traveler Spending by Category



Source: Longwoods International

# **Pennsylvania's Total Travel & Tourism Economy**

**Tourism Satellite Account Measures**

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

# Tourism Satellite Account & total tourism demand

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

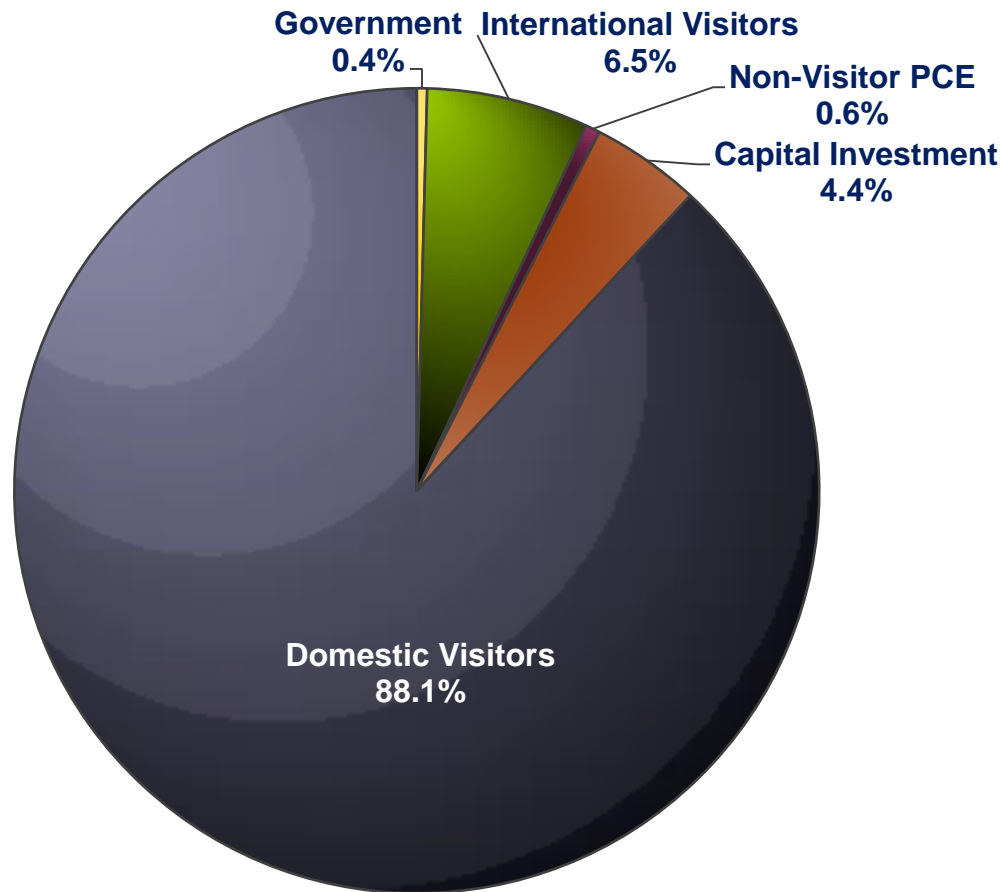
## Total Spending by Category – Tourism Satellite Account (in billions of U.S. dollars)

Calendar Year	Domestic Visitor Spending	International Visitor Spending	Non-Visitor PCE	Government Support	Capital Investment	Total
2014	\$36.99	\$2.72	\$0.24	\$0.18	\$1.84	\$41.97
2013	\$36.56	\$2.66	\$0.24	\$0.17	\$1.54	\$41.17
2012	\$35.82	\$2.64	\$0.24	\$0.16	\$1.57	\$40.43
2011	\$34.42	\$2.61	\$0.24	\$0.16	\$1.53	\$38.95
2010	\$31.59	\$2.58	\$0.24	\$0.16	\$1.35	\$35.91
% Change, 2013-2014	1.2%	2.3%	0.0%	5.9%	19.5%	1.9%

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

# 2014 PA travel and tourism demand by source

## 2014 Travel and Tourism Demand by Source



- At nearly 90%, domestic traveler spending continued to comprise the majority of all spending directly related to travel and tourism in Pennsylvania in 2014.
- International visitor spending accounted for 6.5% of PA's total travel-related sales in 2014.
- Capital investment in travel-related construction and machinery & equipment represented 4.4% of the state's total travel economy sales in 2014.



# Travel & tourism industry capital investment in PA

Travel- and Tourism-Related Capital Investment (in millions of U.S. dollars)							
	2008	2009	2010	2011	2012	2013	2014
Construction	\$1,282	\$619	\$556	\$654	\$663	\$613	\$898
Machinery & Equipment	\$ 808	\$727	\$796	\$872	\$910	\$928	\$939
Total	\$2,089	\$1,346	\$1,353	\$1,526	\$1,573	\$1,541	\$1,838
% Change		-35.6%	0.5%	12.8%	3.1%	-2.1%	19.3%

- The travel and tourism industry invested more than \$1.8 billion in capital-intensive construction and machinery and equipment projects in Pennsylvania in 2014 – a nearly 20% increase compared to the previous year.
- An increase in investment by the hotel/motel segment of more than \$200 million was responsible for the vast majority of the 2014 increase, with more modest investments by the other travel-related segments.

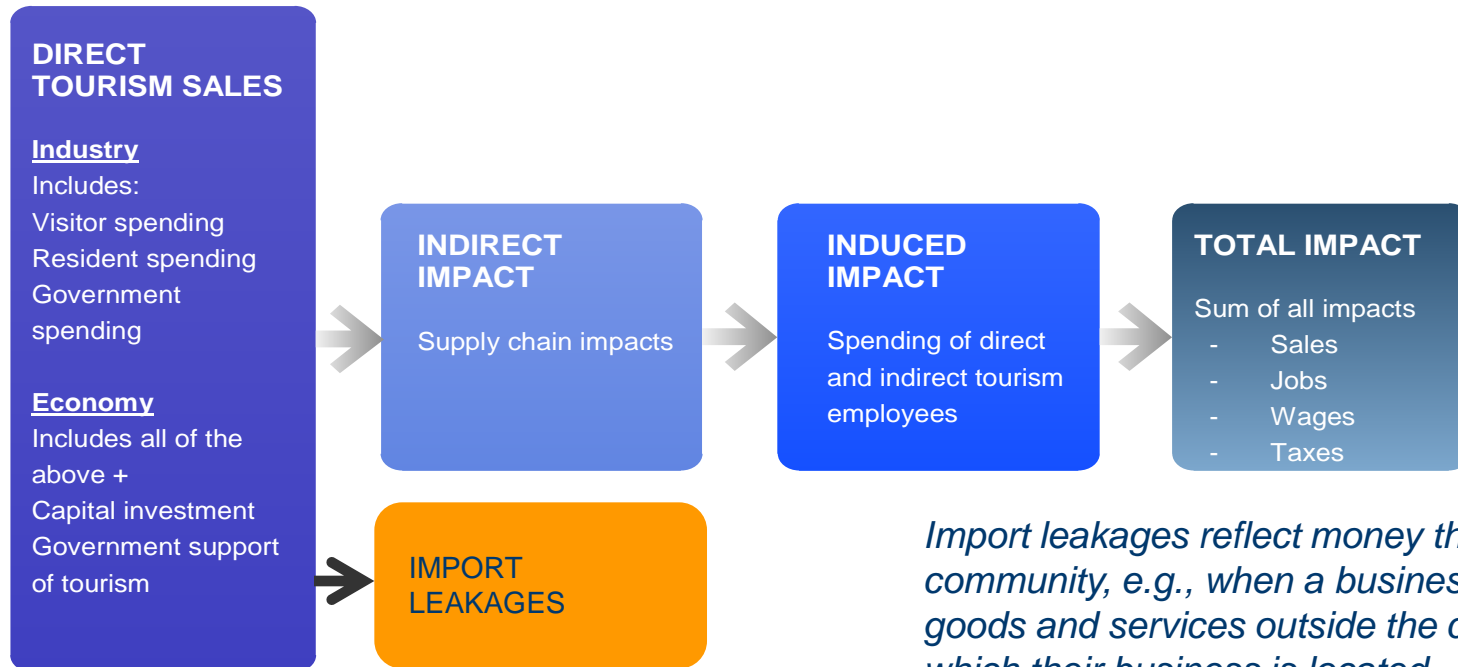
# 2014 Sales to travelers in PA and total economy impact

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

2014 PA Traveler Spending vs. Total Impact By Expenditure Category (in millions of U.S. dollars)		
Industry	Total Traveler Spending	Total Economy Impact
Non-Air Transportation	\$10,248.8	\$10,248.8
Food and Beverage	\$8,092.6	\$8,092.6
Recreation	\$6,700.1	\$6,700.1
Shopping	\$6,323.9	\$6,323.9
Lodging	\$5,282.8	\$5,282.8
Air Transportation	\$3,065.5	\$3,065.5
Capital Investment	\$0	\$1,837.6
Non-Visitor Personal Consumption Exp.	\$0	\$ 235.1
Government	\$0	\$ 180.0
<b>Total</b>	<b>\$39,713.7</b>	<b>\$41,966.5</b>

# Translating sales into impact

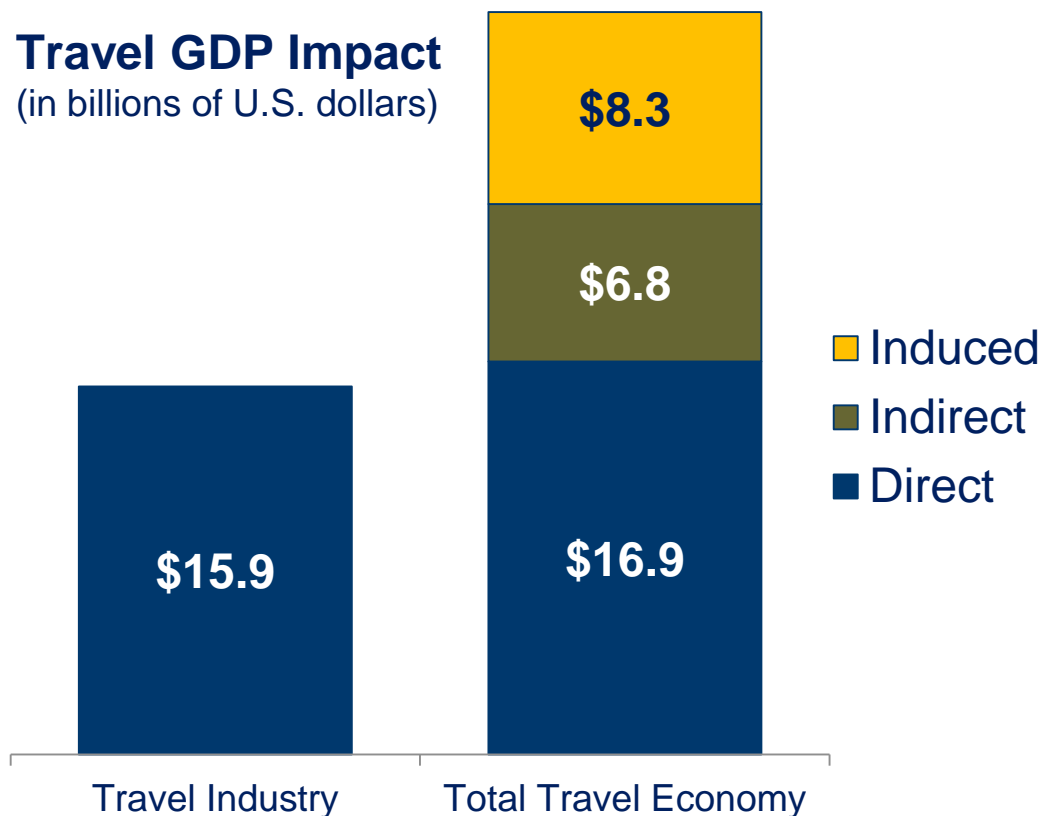
- Direct tourism sales flow through the PA economy, generating GDP, jobs, wages, and taxes.
- The indirect impacts measure supply chain (b2b) activity generated by travel and tourism sales.
- The induced impacts measure the effects of PA worker income generated by travel and tourism-related sales and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



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

# Impact of travel and tourism on PA's 2014 GDP

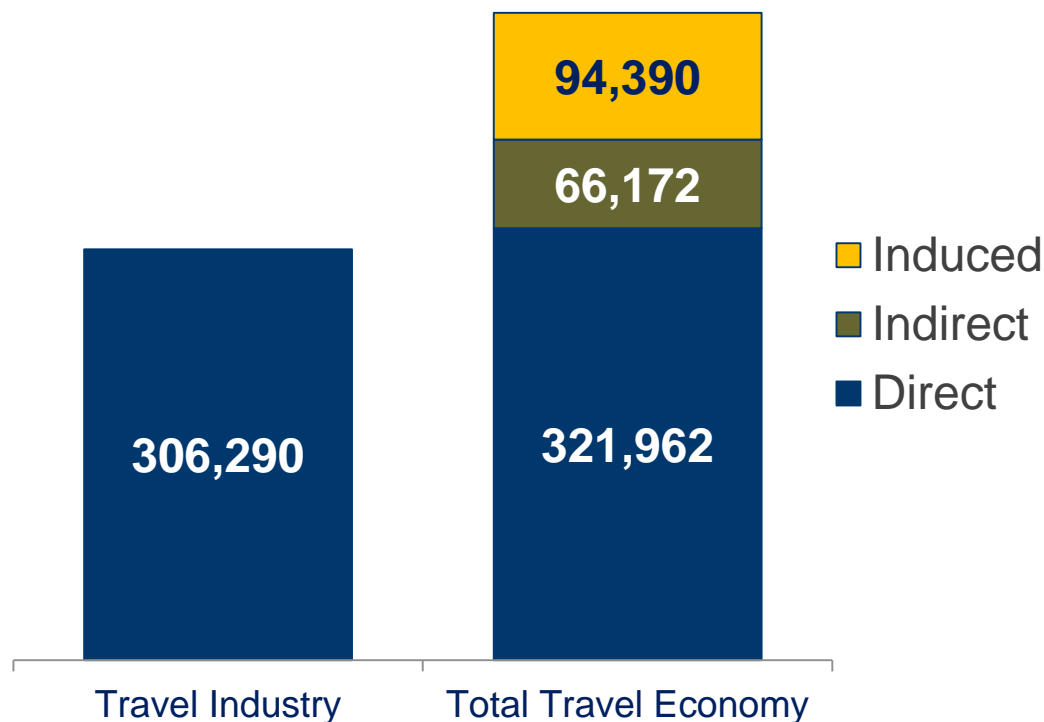
- Pennsylvania's travel and tourism industry directly contributed nearly \$16 billion to the state's gross domestic product (GDP) in 2014.
- The state's total travel and tourism economy (*including direct, indirect, and induced impacts*) generated close to \$32 billion to PA's GDP in 2014 – a figure equivalent to 4.8% of the state's economy.



# Impact of travel and tourism on PA 2014 jobs

- Traveler spending directly supported 306,290 jobs in Pennsylvania in 2014 (*i.e., the travel and tourism industry impact*).
- The travel and tourism economy (*i.e., includes direct, indirect, and induced impacts*) supported 482,520 jobs in PA in 2014, or 6.5% of all jobs in the state – the same proportion as in 2012 and 2013.

Impact of Travel on PA's Job Count in 2014



# State Tourism Industry Impacts

## (Direct Impacts)



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# Travel and tourism industry impact on 2014 GDP and jobs

2014 PA Travel and Tourism Spending Impacts (in millions of U.S. dollars)		
Industry	GDP (in millions)	Employment
Agriculture, Fishing, Mining	--	--
Construction and Utilities	--	--
Manufacturing	--	--
Wholesale Trade	--	--
Air Transportation	\$1,197	9,197
Non-Air Transportation	\$2,047	25,681
Retail Trade	\$1,447	33,323
Gasoline Stations	\$540	8,244
Communications	--	--
Fire, Insurance, and Real Estate (FIRE)	\$1,059	4,264
Business Services	--	--
Education and Health Care	--	--
Recreation and Entertainment	\$2,309	44,243
Lodging	\$3,233	55,959
Food & Beverage	\$3,690	117,777
Personal Services	\$342	7,601
Government	--	--
Total	\$15,859	306,290
Percent Change	3.5%	0.7%

- Travel and tourism industry impacts include only the direct value of the goods and services purchased by travelers and, as such, exclude capital investment and general government support of travel and tourism. This definition is consistent with the national economic accounts.
- On this basis, PA's travel and tourism industry was responsible for \$15.9 billion of the state's gross domestic product (GDP) in 2014 – a 3.5% increase from 2013 and representing 2.4% of the state total.
- Spending by travelers within PA directly supported 306,290 PA jobs – a 0.7% increase from 2013 and representing 4.1% of total employment in the state.

# Why spending and GDP differ

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- Traveler spending in Pennsylvania equaled \$39.7 billion in 2014, yet the industry's contribution to the state's Gross Domestic Product measured just \$15.9 billion. Why are the figures so different?
- GDP (gross domestic product) is less than traveler spending, or “sales,” because GDP measures only the locally produced value of goods and services consumed by travelers.
  - This includes the local labor, capital depreciation, and the profits of travel-related companies that are based in Pennsylvania.
  - The costs of imported goods (e.g., gasoline, food, retail goods, etc.) that come from out-of-state are excluded from the GDP calculation.
  - In addition, business profits from out-of-state companies are also excluded. For example, Wal-Mart profits leave the state and would not be included in PA's GDP.

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

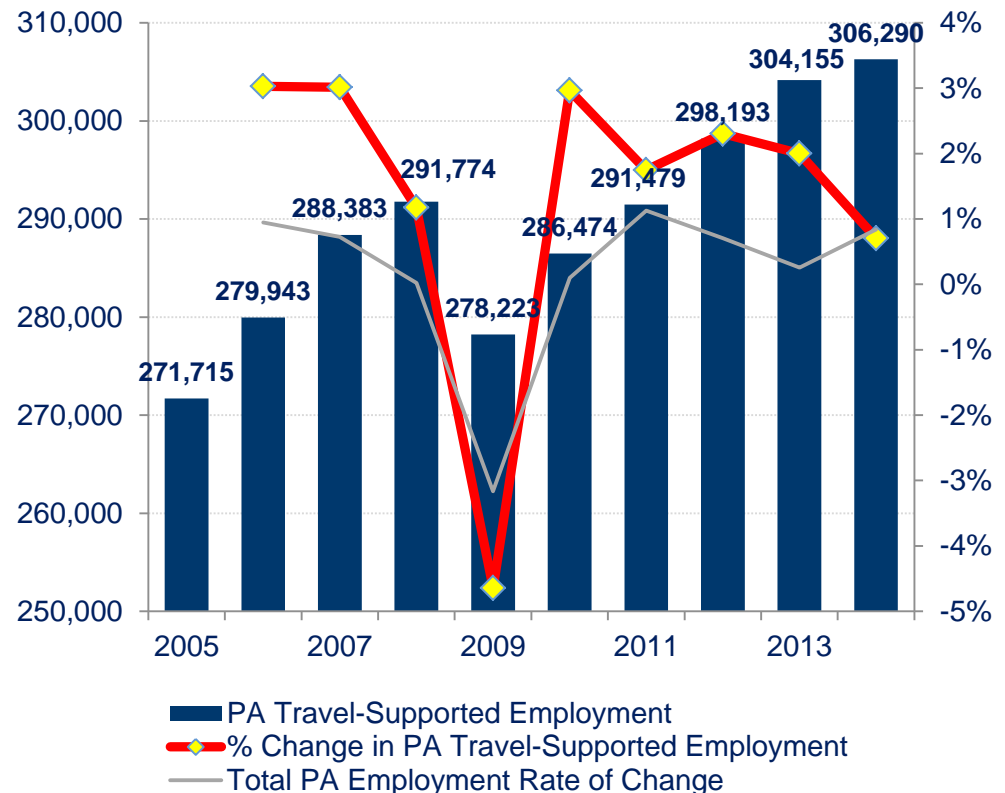


# PA's travel-related employment rose in 2014

## PA Employment Supported By Travel and Tourism

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Employment	271,715	279,943	288,383	291,774	278,223	286,474	291,479	298,193	304,155	306,290
% Change		3.0%	3.0%	1.2%	-4.6%	3.0%	1.7%	2.3%	2.0%	0.7%

- The number of PA jobs directly supported by travel and tourism reached a record high of nearly 306,300 jobs in 2014.
- After outpacing the rate of growth in PA's total non-farm job count, the 0.7% increase in the state's travel-supported employment number was essentially equal to the 0.8% rate of growth in overall state employment in 2014.

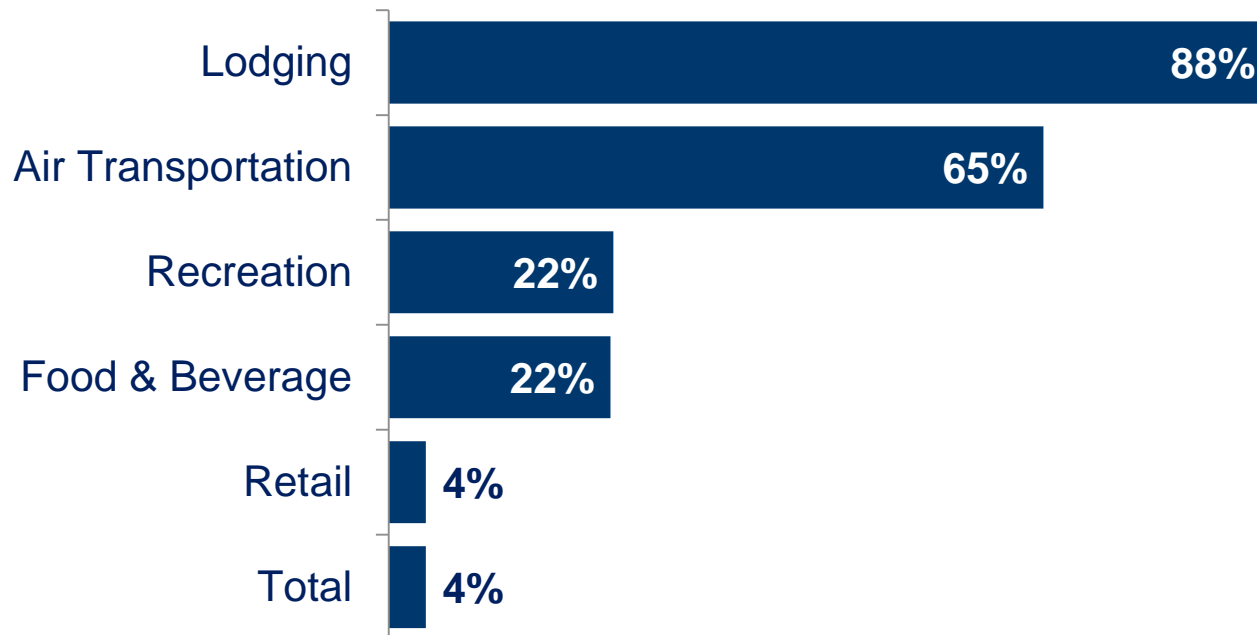


# PA 2014 travel-related employment intensity by industry

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- Travel and tourism continues to represent a significant portion of employment in the state's lodging, air transportation, food & beverage, and recreation sectors, and approximately 4% of the state total.
- These proportions have remained relatively constant over the past several years.

## Travel and Tourism-Related Employment Intensity by Industry



# Ranking PA's 2014 tourism-generated employment

- Travel and tourism continued to rank as PA's 10<sup>th</sup> largest employer in 2014, directly supporting 306,290 jobs in the state's economy. (*Note: Travel and tourism does not have an official NAICS "industry code," but is responsible for a portion of jobs reported for industries with specified codes (e.g., accommodation, food & beverage, retail trade, transportation, etc.).*)

Employment Ranking - Private Sector State of Pennsylvania		
Rank	Industry	2014
1	Health care and social assistance	1,045,457
2	Retail trade	775,562
3	Manufacturing	599,987
4	Professional, scientific, and technical services	492,383
5	Accommodation and food services	479,000
6	Other services, except public administration	421,165
7	Finance and insurance	403,050
8	Administrative and waste management services	387,863
9	Construction	373,327
10	Educational services	287,111
11	Transportation and warehousing	280,395
12	Wholesale trade	247,020
13	Real estate and rental and leasing	244,461
14	Arts, entertainment, and recreation	162,187
15	Management of companies and enterprises	138,048

**PA Jobs Directly  
Supported by Travel:  
306,290**

# State Travel and Tourism Economy Impacts

(Direct, Indirect, and Induced Impacts)



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# PA's travel economy – 2014 GDP impacts by industry

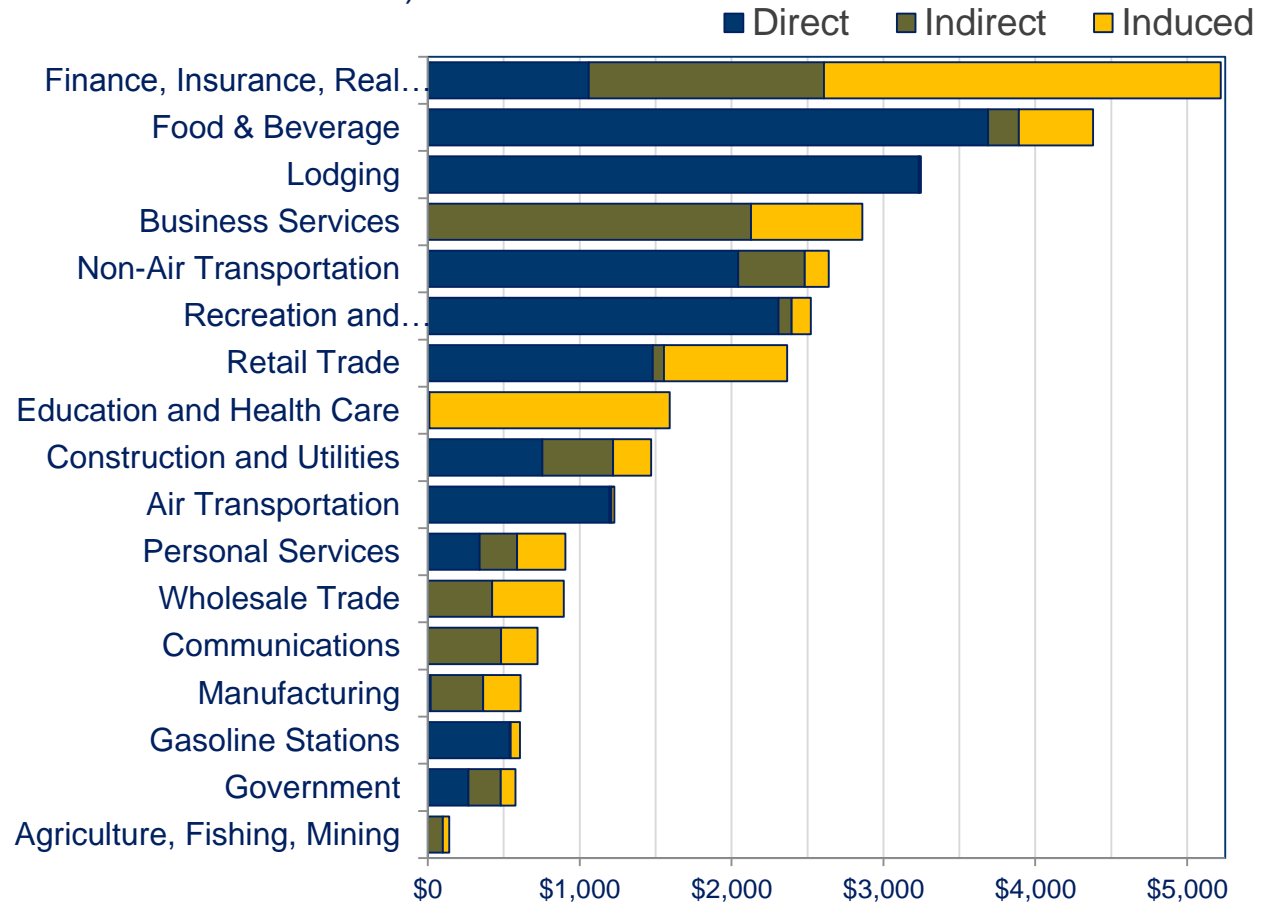
- The following table shows the direct, indirect, and induced impact of travel and tourism on Pennsylvania's GDP for various industry sectors.
- Under the broader economy impact measure, the state's travel and tourism industry generated close to \$32 billion in Gross Domestic Product (GDP) for PA in 2014 – a 3.4% increase from 2013.

2014 PA Travel Economy GDP ( <i>Value Added</i> ) (in millions of U.S. dollars)				
Industry	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	\$ --	\$99	\$43	\$142
Construction and Utilities	754	465	251	1,470
Manufacturing	20	345	246	611
Wholesale Trade	--	423	473	896
Air Transportation	1,197	12	20	1,229
Non-Air Transportation	2,043	440	156	2,639
Retail Trade	1,482	72	813	2,367
Gasoline Stations	540	6	60	606
Communications	--	482	241	723
Finance, Insurance, Real Estate (FIRE)	1,059	1,550	2,612	5,221
Business Services	--	2,127	735	2,862
Education and Health Care	--	11	1,581	1,592
Recreation and Entertainment	2,309	86	127	2,522
Lodging	3,233	6	7	3,247
Food & Beverage	3,690	202	489	4,381
Personal Services	342	245	318	904
Government	267	213	97	577
<b>Total</b>	<b>\$16,936</b>	<b>\$6,786</b>	<b>\$8,269</b>	<b>31,991</b>
<b>Percent Change from 2013</b>	<b>3.5%</b>	<b>2.7%</b>	<b>3.7%</b>	<b>3.4%</b>

# PA's travel economy – 2014 GDP impacts by industry

- Including the indirect and induced supply chain and income effects, travel and tourism benefits a broad spectrum of industries.
- Over 90% of the \$2.5 billion of PA's GDP generated by travel and tourism activity in the recreation and entertainment sector was the direct impact of visitor spending. This is a sector that has shown strong growth over the past several years.

**2014 Travel Economy GDP Impact by Industry**  
(in millions of U.S. dollars)



\*Finance, Insurance, Real Estate

# PA travel economy – 2014 employment impacts by industry

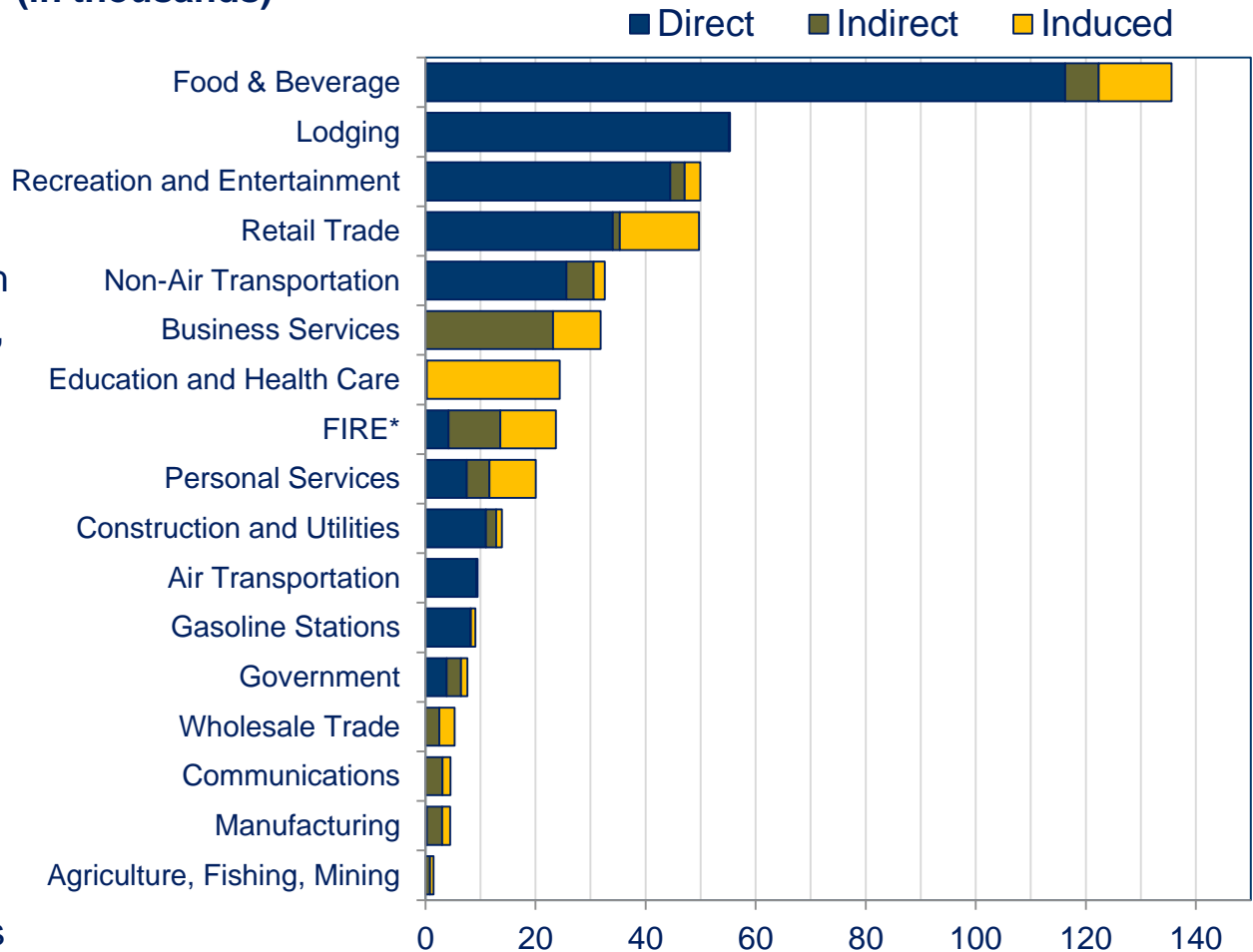
- Pennsylvania's travel and tourism industry supported 482,524 jobs in total, or 6.5% of PA's total employment number in 2014, a proportion that was remained relatively constant since 2012.
- The total presented below reflects the broadest measurement of employment, i.e., includes businesses directly serving the traveling public and their support industries, as well as jobs supported by government spending, capital investment, and private consumption expenditures.

2014 PA Travel-Related Employment ( <i>Value Added</i> )				
Industry	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	--	828	665	1,492
Construction and Utilities	11,176	1,912	1,067	14,155
Manufacturing	251	2,797	1,459	4,507
Wholesale Trade	--	2,501	2,792	5,292
Air Transportation	9,197	90	150	9,437
Non-Air Transportation	25,681	4,971	2,023	32,675
Retail Trade	33,744	1,286	14,444	49,475
Gasoline Stations	8,244	95	856	9,195
Communications	--	3,063	1,424	4,487
Finance, Insurance, Real Estate (FIRE)	4,264	9,411	10,204	23,880
Business Services	--	23,398	8,766	32,165
Education and Health Care	--	241	24,507	24,749
Recreation and Entertainment	44,243	2,600	2,849	49,692
Lodging	55,959	103	122	56,184
Food & Beverage	117,777	6,145	13,398	137,321
Personal Services	7,601	4,132	8,528	20,261
Government	3,824	2,597	1,135	7,556
<b>Total</b>	<b>321,962</b>	<b>66,172</b>	<b>94,390</b>	<b>482,524</b>
Percent Change from 2013	0.7%	0.6%	1.0%	0.8%

# PA travel economy – 2014 employment impacts by industry

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

**2014 Total Travel Employment Impact by Industry**  
(in thousands)



\*Finance, Insurance, Real Estate



# Travel economy – 2014 labor income impacts by industry

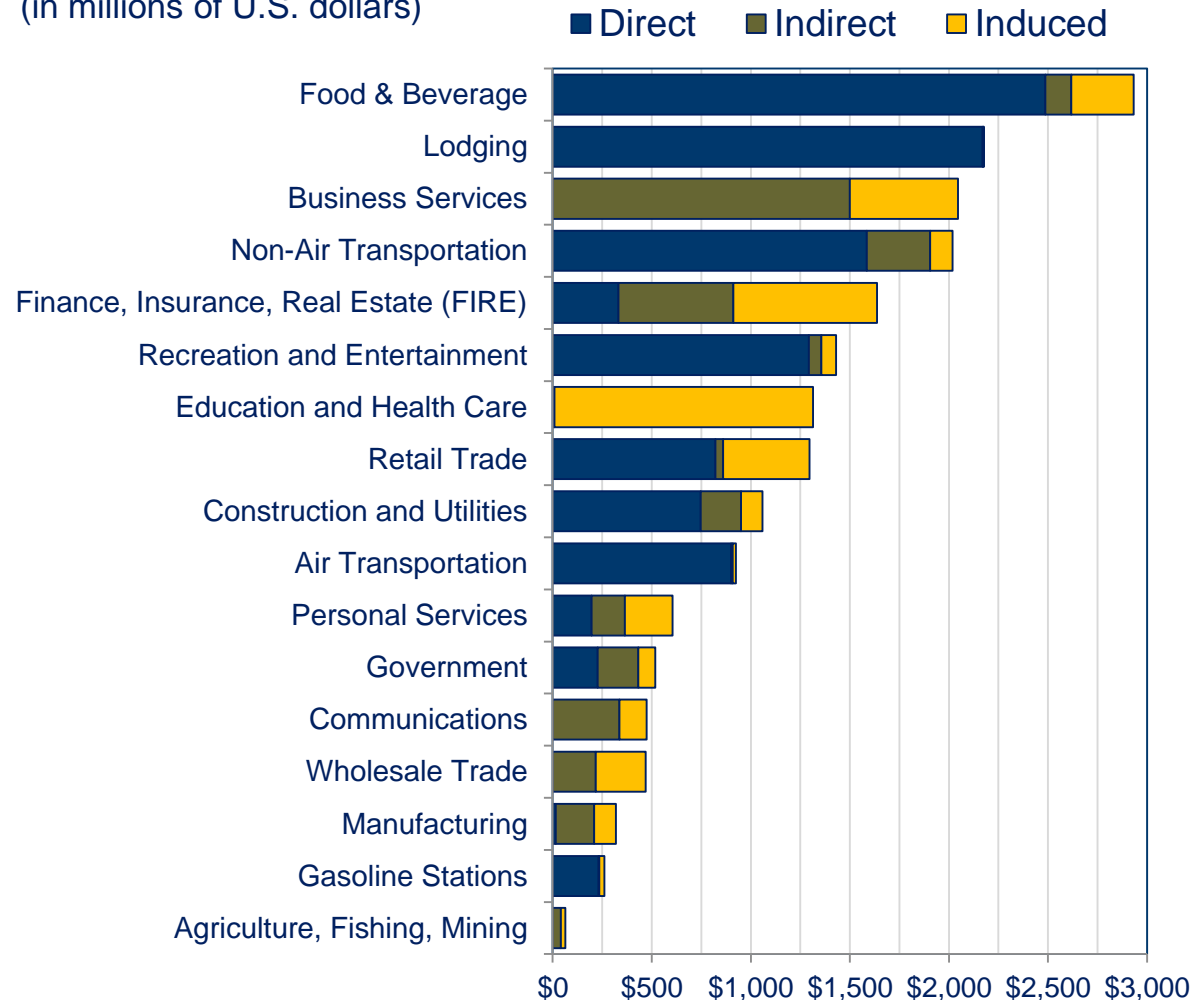
Traveler spending generated over \$19.5 billion in income for persons employed by PA businesses supported in some way by travel and tourism in 2014.

2014 PA Travel-Related Labor Income (Compensation) (in millions of U.S. dollars)				
Industry	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	\$ --	\$42.0	\$21.5	\$63.5
Construction and Utilities	746.8	203.1	109.4	1,059.2
Manufacturing	15.0	193.8	110.6	319.3
Wholesale Trade	--	217.7	251.1	468.9
Air Transportation	900.9	8.5	14.7	924.1
Non-Air Transportation	1,585.1	320.2	112.7	2,018.0
Retail Trade	821.2	39.7	436.1	1,297.0
Gasoline Stations	232.8	2.8	25.0	260.6
Communications	--	337.5	136.9	474.3
Finance, Insurance, Real Estate (FIRE)	332.0	579.3	725.4	1,636.8
Business Services	--	1,500.1	545.4	2,045.6
Education and Health Care	--	8.7	1,305.6	1,314.2
Recreation and Entertainment	1,293.0	62.4	74.4	1,429.8
Lodging	2,169.5	3.4	4.2	2,177.1
Food & Beverage	2,486.4	130.4	314.9	2,931.6
Personal Services	196.8	167.1	241.1	605.0
Government	227.1	205.4	84.7	517.2
<b>Total</b>	<b>\$11,006.6</b>	<b>\$4,021.8</b>	<b>\$4,513.9</b>	<b>\$19,542.2</b>
<b>Percent Change from 2013</b>	<b>4.1%</b>	<b>3.7%</b>	<b>4.1%</b>	<b>4.0%</b>

# Travel economy – 2014 labor income impacts by industry

- Traveler spending generated well over \$19.5 billion for the state's business owners and their employees, with the direct impact led by traveler intensive industries, i.e., restaurants, lodging, and transportation.
- Business owners and employees of business services and finance, insurance & real estate (FIRE) companies also benefited substantially as suppliers to the state's travel and tourism industry.

**2014 Total Labor Income Impact by Industry**  
(in millions of U.S. dollars)



# Travel economy – 2014 tax generation

- Travelers were responsible for more than \$4.2 billion in state and local tax revenues and an additional \$4.3 billion in federal taxes in 2014.
- Pennsylvania's state and local governments would have to tax each PA household an additional \$855 per year to replace the taxes generated by travel and tourism.

Traveler-Generated Taxes, 2009 - 2014 (in millions of U.S. dollars)							
Tax Type	2009	2010	2011	2012	2013	2014	% Change
<b>Federal Taxes</b>	<b>\$3,505.1</b>	<b>\$3,681.6</b>	<b>\$3,856.4</b>	<b>\$4,007.8</b>	<b>\$4,163.9</b>	<b>\$4,312.3</b>	<b>3.6%</b>
Corporate	349.2	369.5	387.1	405.3	411.8	418.2	1.6%
Indirect Business	332.3	351.6	368.3	385.7	391.8	397.9	1.6%
Personal Income	1,035.3	1,085.5	1,137.0	1,179.5	1,232.1	1,281.92	4.0%
Social Security	1,788.3	1,875.0	1,964.0	2,037.3	2,128.2	2,214.3	4.0%
<b>State and Local Taxes</b>	<b>\$3,378.5</b>	<b>\$3,572.6</b>	<b>\$3,799.2</b>	<b>\$4,023.6</b>	<b>\$4,132.6</b>	<b>\$4,223.7</b>	<b>2.2%</b>
Corporate	214.7	235.9	250.5	265.9	270.2	274.4	1.6%
Personal Income	325.1	340.8	357.0	370.3	386.9	402.5	4.0%
Sales	1,199.7	1,316.7	1,441.5	1,507.6	1,533.6	1,553.3	1.3%
Hotel Occupancy	112.2	121.7	133.1	143.6	152.9	160.0	4.7%
Property	1,030.2	1,032.3	1,066.9	1,155.6	1,195.5	1,227.1	2.6%
Excise and Fees	468.3	495.6	519.1	548.3	559.9	571.4	2.1%
PA Unemployment	28.3	29.6	31.1	32.2	33.7	35.0	4.0%
<b>TOTAL</b>	<b>\$6,883.5</b>	<b>\$7,254.3</b>	<b>\$7,655.7</b>	<b>\$8,031.4</b>	<b>\$8,296.5</b>	<b>\$8,536.0</b>	<b>2.9%</b>

# **Pennsylvania's Tourism Regions**

## **2014 Traveler Spending and Economic Impact By Region and County**



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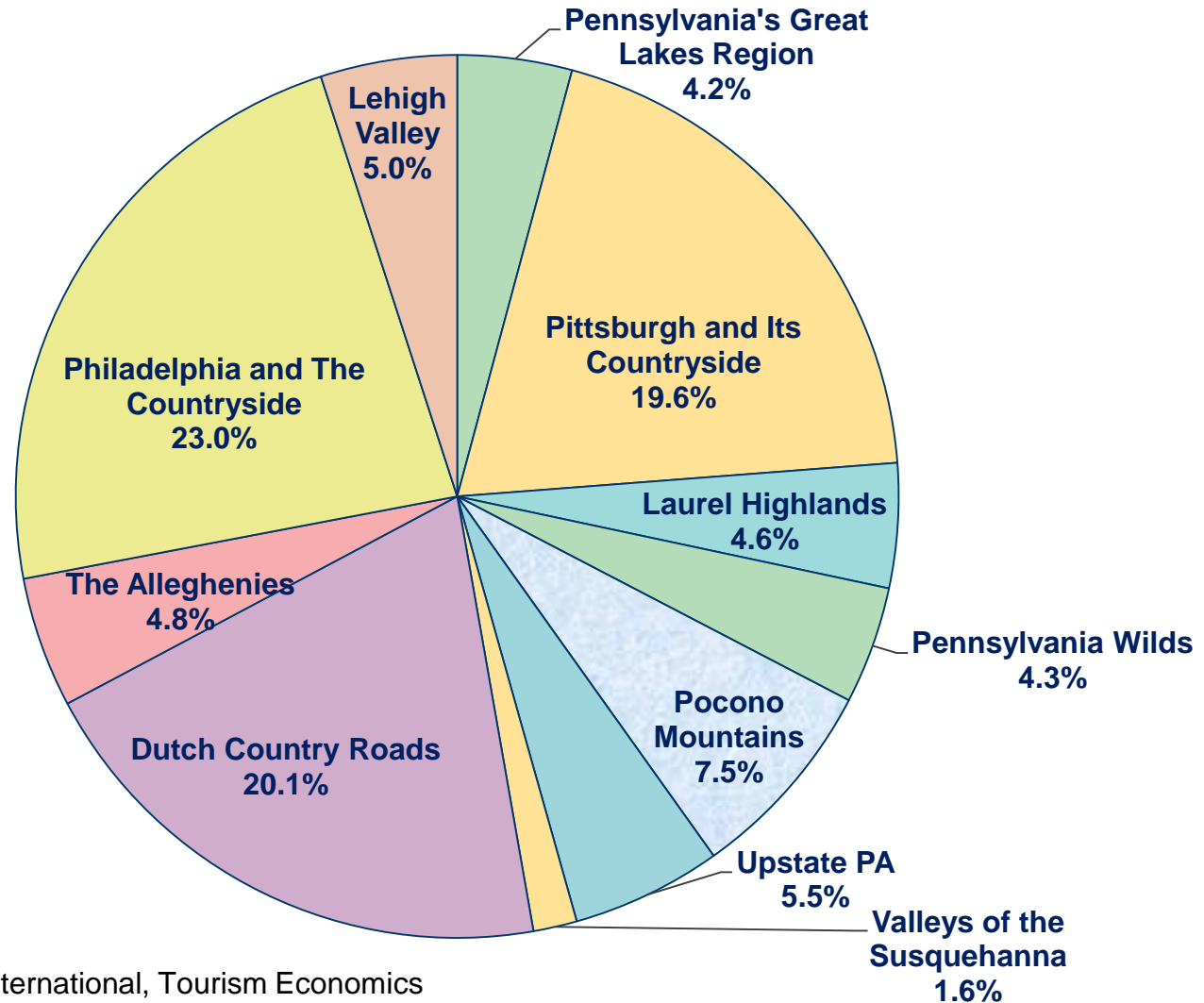
# Regional Spending





# Percent of 2014 traveler spending by PA region

## Share of Total 2014 Visitor Spending in PA by Region

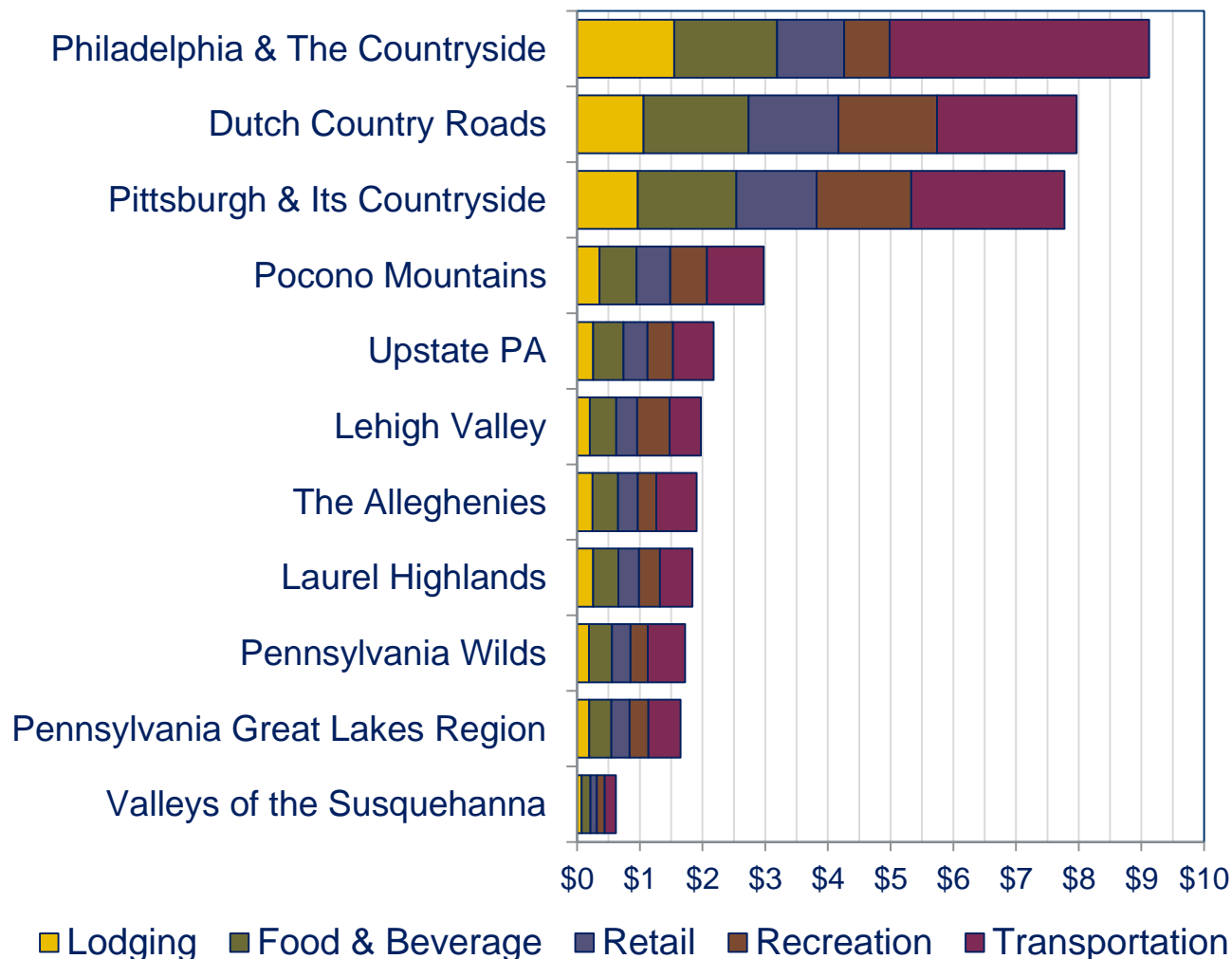


Source: Longwoods International, Tourism Economics

# 2014 Traveler spending in PA regions by category

- Travelers to the Lehigh Valley, Dutch Country Roads, Pocono Mountains, Valleys of the Susquehanna, and Pittsburgh regions spent proportionally more on recreation in 2014 than travelers to other regions.
- As in prior years, travelers to the Philadelphia & Its Countryside region spent far more of their trip dollars on transportation than travelers to other regions.

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

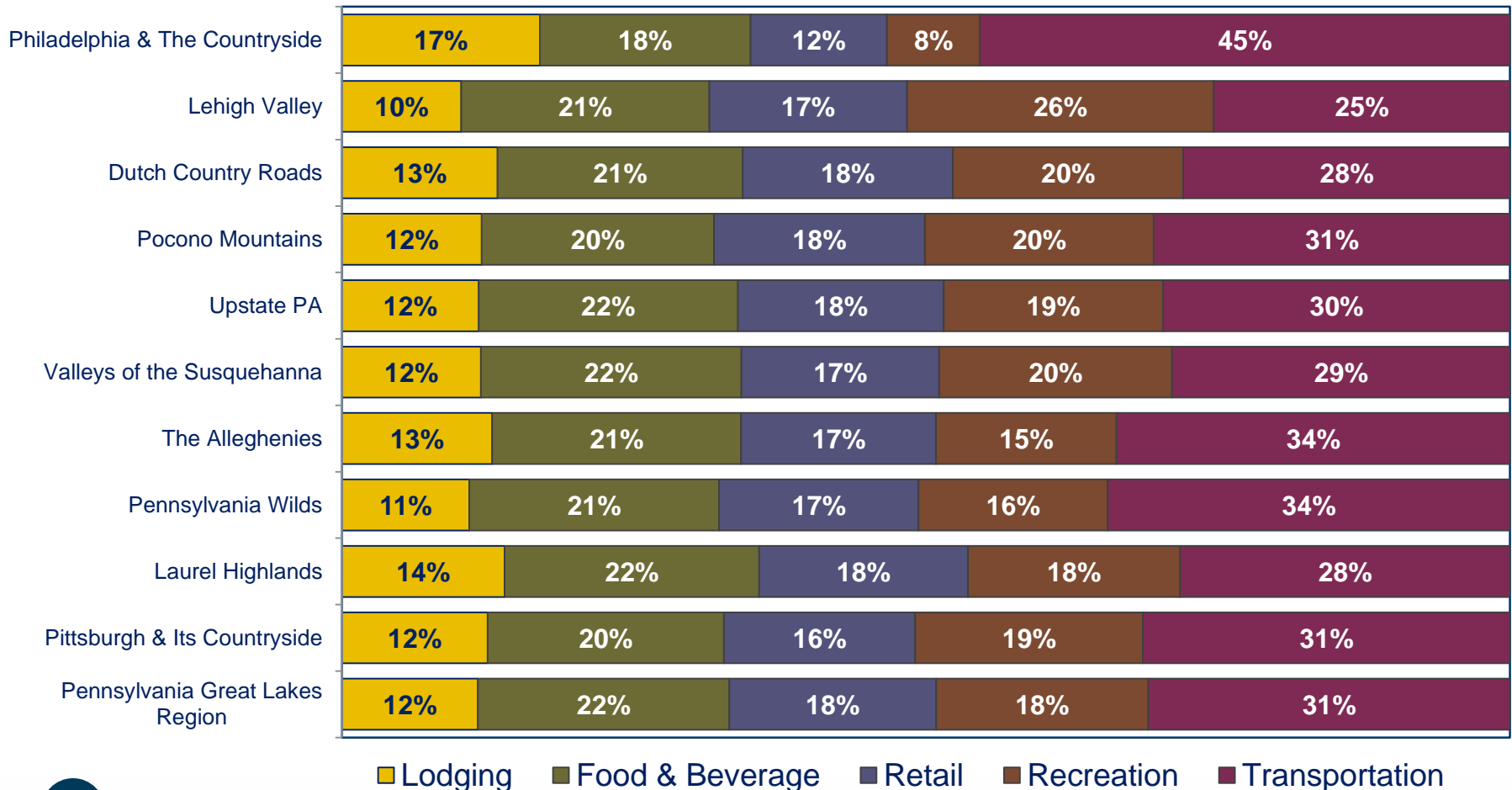


# 2014 PA spending by category -- % of region total

- While still capturing the largest share of traveler dollars, the share going to transportation costs dropped in 2014 as a result of the overall decrease in fuel costs.

## 2014 Traveler Spending by Category and Region

Percent of Region Total





# 2014 Total travel economy employment & intensity

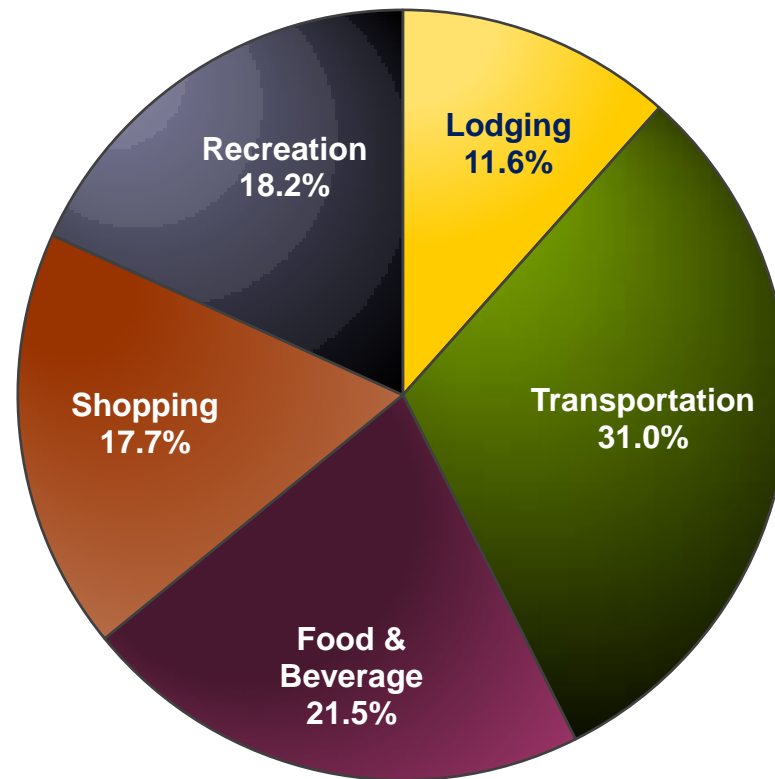
- Travel Employment Intensity is a measure of each county's dependence on the travel industry for jobs. The Pocono Mountains region is by far the most dependent of all PA tourism regions on the travel industry as a job provider, followed by the Laurel Highlands region as a distant second and then the Pennsylvania Wilds region in 2014.
- 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 followed by the Upstate PA and Lehigh Valley regions in 2014.



# Pennsylvania's Great Lakes Region

- Pennsylvania's Great Lakes region is comprised of Crawford, Erie, Mercer and Venango counties.
- Travelers spent nearly \$1.65 billion in the region in 2014 – a 0.4% increase from 2013's spending level and a new record high (*in nominal dollars*).
- The region ranked 4<sup>th</sup> among the state's 11 tourism regions in the proportion of traveler dollars spent on shopping and food and beverage purchases in 2014.

**Pennsylvania's Great Lakes Region  
2014 Spending by Category**

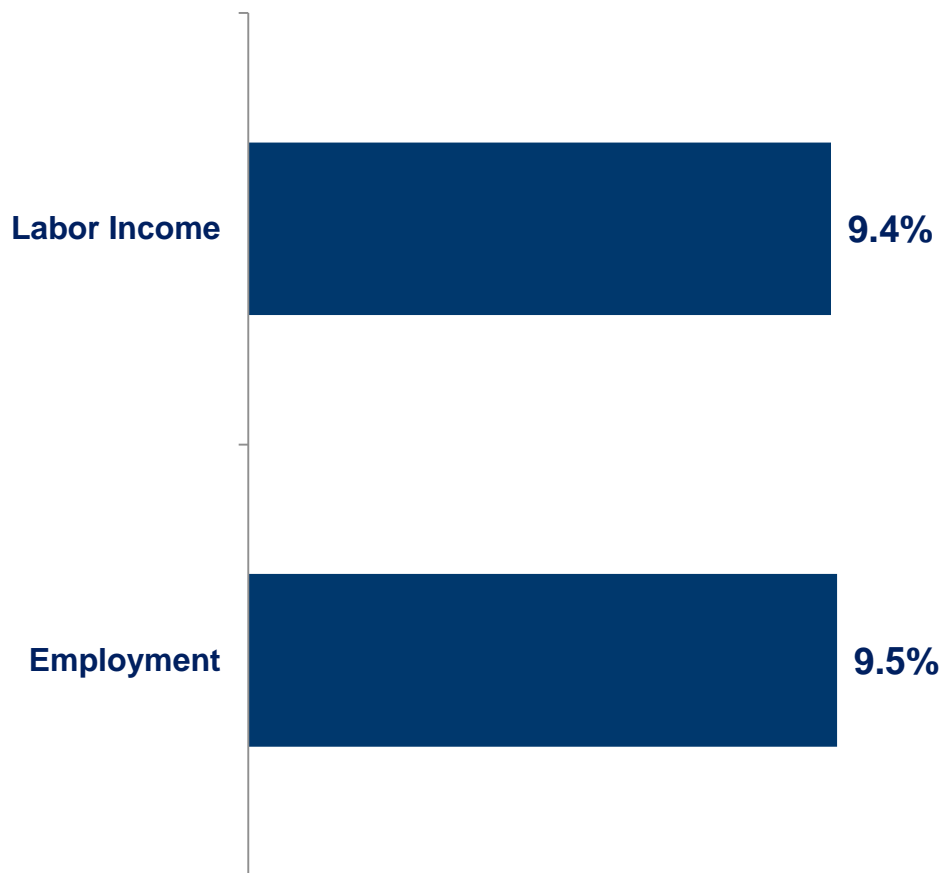


Source: Tourism Economics

# Pennsylvania's Great Lakes Region

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

**Travel Industry Share of Regional Economy**



# PA's Great Lakes Region – Traveler spending & employment timelines

## Tourism Industry Spending

(Millions of dollars)

County	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Crawford	259.7	260.0	258.4	274.9	219.7	241.5	250.9	260.3	265.6	259.0
Erie	726.9	733.7	778.8	876.0	741.2	829.4	897.7	930.7	925.4	941.2
Mercer	240.8	241.1	243.2	279.8	233.2	256.0	279.8	304.9	319.9	315.9
Venango	119.2	116.1	118.7	130.2	108.7	118.3	123.0	132.1	130.9	132.6
Great Lakes	1,346.6	1,350.9	1,399.0	1,560.8	1,302.7	1,445.2	1,551.4	1,628.1	1,641.9	1,648.7
Percent Change		0.3%	3.6%	11.6%	-16.5%	10.9%	7.4%	4.9%	0.8%	0.4%

## Tourism Industry Employment Impacts

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

# PA's Great Lakes Region – Traveler spending by category

<b>Tourism Direct Sales</b>						
<b>(Millions of dollars)</b>						
<b>County</b>	<b>Lodging</b>	<b>Food &amp; beverage</b>	<b>Retail</b>	<b>Recreation</b>	<b>Transport</b>	<b>Total</b>
<b>2014</b>						
<b>Crawford</b>	<b>19.2</b>	<b>61.3</b>	<b>45.9</b>	<b>40.5</b>	<b>92.1</b>	<b>259.0</b>
<b>Erie</b>	<b>118.9</b>	<b>197.9</b>	<b>160.3</b>	<b>190.2</b>	<b>273.9</b>	<b>941.2</b>
<b>Mercer</b>	<b>42.7</b>	<b>71.7</b>	<b>64.8</b>	<b>52.7</b>	<b>84.0</b>	<b>315.9</b>
<b>Venango</b>	<b>11.2</b>	<b>23.8</b>	<b>21.0</b>	<b>15.8</b>	<b>60.9</b>	<b>132.6</b>
<b>Great Lakes</b>	<b>192.0</b>	<b>354.6</b>	<b>292.0</b>	<b>299.3</b>	<b>510.8</b>	<b>1,648.7</b>
<b>Percent Change</b>	<b>3.8%</b>	<b>2.3%</b>	<b>0.3%</b>	<b>-0.6%</b>	<b>-1.4%</b>	<b>0.4%</b>
<b>2013</b>						
<b>Crawford</b>	<b>18.5</b>	<b>59.6</b>	<b>48.2</b>	<b>43.2</b>	<b>96.1</b>	<b>265.6</b>
<b>Erie</b>	<b>112.9</b>	<b>192.3</b>	<b>156.8</b>	<b>188.3</b>	<b>275.0</b>	<b>925.4</b>
<b>Mercer</b>	<b>42.5</b>	<b>71.0</b>	<b>65.5</b>	<b>53.7</b>	<b>87.1</b>	<b>319.9</b>
<b>Venango</b>	<b>11.0</b>	<b>23.6</b>	<b>20.7</b>	<b>16.0</b>	<b>59.6</b>	<b>130.9</b>
<b>Great Lakes</b>	<b>185.0</b>	<b>346.6</b>	<b>291.2</b>	<b>301.2</b>	<b>517.8</b>	<b>1,641.9</b>

# PA's Great Lakes Region – 2013 & 2014 TSA spending

<b>Tourism Satellite Account Categories</b>				
<b>(Millions of dollars)</b>				
<b>County</b>	<b>Visitor Spending</b>	<b>Government Investment &amp; Non-visitor PCE</b>	<b>Total Tourism Demand</b>	
<b>2014</b>				
<b>Crawford</b>	<b>259.0</b>	<b>0.4</b>	<b>13.5</b>	<b>272.9</b>
<b>Erie</b>	<b>941.2</b>	<b>4.9</b>	<b>49.1</b>	<b>995.2</b>
<b>Mercer</b>	<b>315.9</b>	<b>0.8</b>	<b>16.5</b>	<b>333.2</b>
<b>Venango</b>	<b>132.6</b>	<b>0.2</b>	<b>6.9</b>	<b>139.7</b>
<b>Great Lakes</b>	<b>1,648.7</b>	<b>6.3</b>	<b>86.0</b>	<b>1,741.0</b>
<b>Percent Change</b>	<b>0.4%</b>	<b>2.1%</b>	<b>-1.1%</b>	<b>0.3%</b>
<b>2013</b>				
<b>Crawford</b>	<b>265.6</b>	<b>0.4</b>	<b>14.1</b>	<b>280.0</b>
<b>Erie</b>	<b>925.4</b>	<b>4.7</b>	<b>49.0</b>	<b>979.2</b>
<b>Mercer</b>	<b>319.9</b>	<b>0.8</b>	<b>16.9</b>	<b>337.7</b>
<b>Venango</b>	<b>130.9</b>	<b>0.2</b>	<b>6.9</b>	<b>138.1</b>
<b>Great Lakes</b>	<b>1,641.9</b>	<b>6.2</b>	<b>86.9</b>	<b>1,735.0</b>

# PA's Great Lakes Region – 2013 & 2014 Travel Industry impacts

Tourism Industry Impacts					
(Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2014					
Crawford	259.0	2,151	50.2	13.5	11.9
Erie	941.2	7,639	193.8	53.7	44.8
Mercer	315.9	2,640	56.2	16.4	13.8
Venango	132.6	1,166	29.2	7.3	6.6
Great Lakes	1,648.7	13,596	329.4	90.9	77.0
Percent Change	0.4%	1.2%	2.9%	0.3%	2.0%
2013					
Crawford	265.6	2,150	49.4	13.8	11.9
Erie	925.4	7,516	187.2	53.0	43.5
Mercer	319.9	2,614	55.0	16.6	13.7
Venango	130.9	1,158	28.3	7.2	6.4
Great Lakes	1,641.9	13,437	320.0	90.7	75.5

# PA's Great Lakes Region – 2013 & 2014 Travel Economy impacts

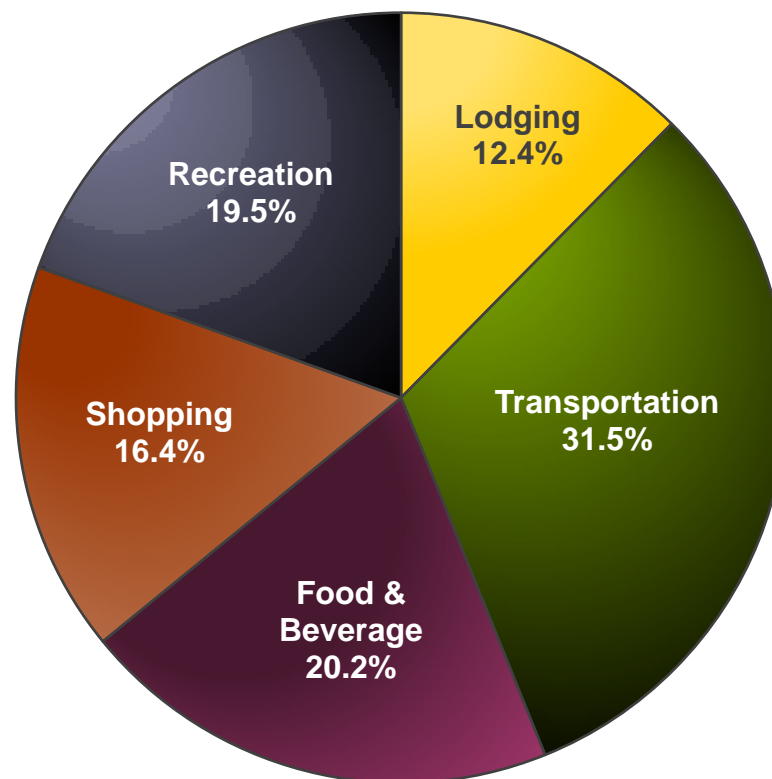
Total Tourism Economy Impacts					
(Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2014					
Crawford	272.9	3,395	105.6	23.9	23.9
Erie	995.2	11,695	382.5	92.4	90.1
Mercer	333.2	4,108	118.9	28.7	27.8
Venango	139.7	1,851	60.8	12.9	13.2
Great Lakes	1,741.0	21,049	667.7	157.9	155.1
Percent Change	0.3%	0.9%	2.0%	0.2%	2.0%
2013					
Crawford	280.0	3,395	104.7	24.5	23.9
Erie	979.2	11,548	373.3	91.4	87.7
Mercer	337.7	4,078	117.3	29.0	27.6
Venango	138.1	1,842	59.5	12.8	12.9
Great Lakes	1,735.0	20,864	654.8	157.7	152.1



# Pittsburgh & Its Countryside

- Pittsburgh & Its Countryside region is comprised of the following eight counties: Allegheny, Armstrong, Beaver, Butler, Greene, Indiana, Lawrence, and Washington.
- Travelers spent close to \$7.8 billion in the region in 2014 - a 1.7% increase from 2013. As in prior years, the region had the third highest level of traveler spending level of the state's 11 tourism regions in 2014.
- The region had the second largest increase in the dollar amount of traveler spending between 2013 and 2014, and ranked fourth in the percentage increase among the state's tourism regions.

## Pittsburgh and Its Countryside Region 2014 Spending by Category

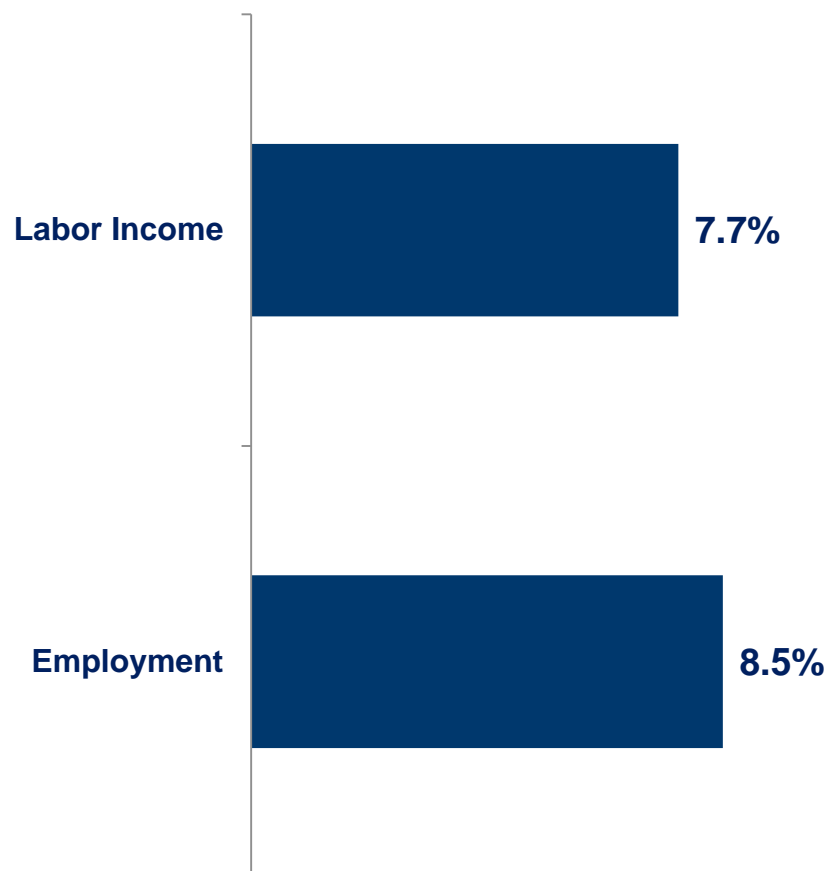


Source: Tourism Economics

# Pittsburgh & Its Countryside

- The chart shows the travel economy's share (including direct, indirect, and induced impacts) of the region's total for both labor income and employment.
- The travel industry's share of the Pittsburgh region's total labor income was 7.7% in 2014, while the industry's share of the region's employment base was higher at 8.5%, with both showing increases from 2013.
- The region continued to have the 3<sup>rd</sup> highest number of travel-supported jobs of the state's 11 tourism regions and rank 7<sup>th</sup> in the industry's employment intensity in 2014.

**Travel Industry Share of Regional Economy**



# Pittsburgh & Its Countryside – Traveler spending & employment timelines

## Tourism Industry Spending

(Millions of dollars)

County	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Allegheny	4,010.2	4,096.5	4,360.9	4,979.8	4,354.6	4,828.1	5,232.6	5,494.0	5,575.1	5,679.8
Armstrong	67.1	68.3	71.2	75.3	58.6	71.3	84.1	89.8	91.3	90.9
Beaver	189.9	185.0	197.6	226.9	196.0	217.2	237.5	244.9	249.8	256.4
Butler	367.2	377.9	406.5	455.5	406.1	440.6	485.9	578.8	582.1	597.6
Greene	58.5	56.4	60.8	65.3	58.7	68.9	73.8	80.4	91.9	94.7
Indiana	129.5	124.7	135.3	152.6	144.5	154.2	169.8	184.3	179.1	175.3
Lawrence	89.0	92.0	95.0	101.4	83.7	98.6	113.5	118.9	117.9	119.6
Washington	404.7	415.0	451.2	497.1	482.3	582.7	668.7	740.7	755.3	760.3
Pittsburgh and Its Countryside	5,316.3	5,415.8	5,778.4	6,554.1	5,784.5	6,461.7	7,065.9	7,531.8	7,642.5	7,774.5
Percent Change		1.9%	6.7%	13.4%	-11.7%	11.7%	9.4%	6.6%	1.5%	1.7%

## Tourism Industry Employment Impacts

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

# Pittsburgh & Its Countryside – Traveler Spending by category

<b>Tourism Direct Sales</b>						
<b>(Millions of dollars)</b>						
<b>County</b>	<b>Lodging</b>	<b>Food &amp; beverage</b>	<b>Retail</b>	<b>Recreation</b>	<b>Transport</b>	<b>Total</b>
<b>2014</b>						
Allegheny	719.4	1,129.2	916.1	1,099.1	1,816.0	5,679.8
Armstrong	4.0	17.0	13.3	25.7	30.8	90.9
Beaver	18.6	54.3	43.6	40.4	99.5	256.4
Butler	83.0	131.0	108.2	97.6	177.7	597.6
Greene	14.6	21.1	15.8	14.6	28.5	94.7
Indiana	21.9	40.9	32.7	28.6	51.3	175.3
Lawrence	7.3	27.3	23.6	23.5	38.0	119.6
Washington	100.5	152.1	120.9	184.5	202.3	760.3
<b>Pittsburgh and Its Countryside</b>	<b>969.3</b>	<b>1,572.9</b>	<b>1,274.2</b>	<b>1,514.0</b>	<b>2,444.1</b>	<b>7,774.5</b>
<b>Percent Change</b>	<b>6.2%</b>	<b>2.6%</b>	<b>3.1%</b>	<b>3.2%</b>	<b>-2.0%</b>	<b>1.7%</b>
<b>2013</b>						
Allegheny	681.5	1,107.3	890.2	1,058.5	1,837.6	5,575.1
Armstrong	3.7	16.5	13.0	25.6	32.5	91.3
Beaver	17.1	52.6	41.7	39.8	98.6	249.8
Butler	74.5	123.9	102.2	93.9	187.6	582.1
Greene	13.3	20.2	15.2	14.3	28.9	91.9
Indiana	22.1	40.5	32.8	29.3	54.4	179.1
Lawrence	6.8	26.1	23.4	22.8	38.8	117.9
Washington	93.4	146.0	117.5	182.8	215.7	755.3
<b>Pittsburgh and Its Countryside</b>	<b>912.4</b>	<b>1,532.9</b>	<b>1,236.0</b>	<b>1,466.9</b>	<b>2,494.3</b>	<b>7,642.5</b>

# Pittsburgh & Its Countryside – 2013 & 2014 TSA spending

<b>Tourism Satellite Account Categories</b> (Millions of dollars)				
County	Visitor Spending	Government	Investment & Non-visitor PCE	Total Tourism Demand
<b>2014</b>				
Allegheny	5,679.8	34.5	296.3	6,010.6
Armstrong	90.9	0.1	4.7	95.7
Beaver	256.4	0.4	13.4	270.2
Butler	597.6	1.8	31.2	630.5
Greene	94.7	0.3	4.9	99.9
Indiana	175.3	0.5	9.1	185.0
Lawrence	119.6	0.2	6.2	126.1
Washington	760.3	2.1	39.7	802.0
Pittsburgh and Its Countryside	7,774.5	39.9	405.6	8,220.0
Percent Change	1.7%	4.6%	0.2%	1.7%
<b>2013</b>				
Allegheny	5,575.1	33.0	295.2	5,903.3
Armstrong	91.3	0.1	4.8	96.2
Beaver	249.8	0.4	13.2	263.5
Butler	582.1	1.7	30.8	614.6
Greene	91.9	0.3	4.9	97.0
Indiana	179.1	0.5	9.5	189.0
Lawrence	117.9	0.2	6.2	124.4
Washington	755.3	1.9	40.0	797.2
Pittsburgh and Its Countryside	7,642.5	38.1	404.6	8,085.2

# Pittsburgh & Its Countryside – 2013 & 2014 Travel Industry impacts

Tourism Industry Impacts					
(Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2014					
Allegheny	5,679.8	40,254	1,440.4	355.6	307.3
Armstrong	90.9	576	14.0	4.4	3.7
Beaver	256.4	2,070	56.0	14.0	12.6
Butler	597.6	4,050	106.7	31.2	26.2
Greene	94.7	488	11.3	4.4	3.4
Indiana	175.3	1,460	32.4	9.2	7.8
Lawrence	119.6	917	23.0	6.3	5.5
Washington	760.3	5,953	171.7	43.0	38.2
Pittsburgh and Its Countryside	7,774.5	55,767	1,855.5	468.1	404.7
Percent Change	1.7%	0.7%	4.4%	1.7%	3.4%
2013					
Allegheny	5,575.1	39,964	1,377.0	348.8	296.7
Armstrong	91.3	573	13.4	4.4	3.6
Beaver	249.8	2,048	55.2	13.9	12.4
Butler	582.1	3,996	101.9	30.5	25.2
Greene	91.9	485	11.0	4.3	3.3
Indiana	179.1	1,450	31.5	9.4	7.8
Lawrence	117.9	907	21.9	6.2	5.3
Washington	755.3	5,949	166.3	42.7	37.4
Pittsburgh and Its Countryside	7,642.5	55,374	1,778.2	460.1	391.5

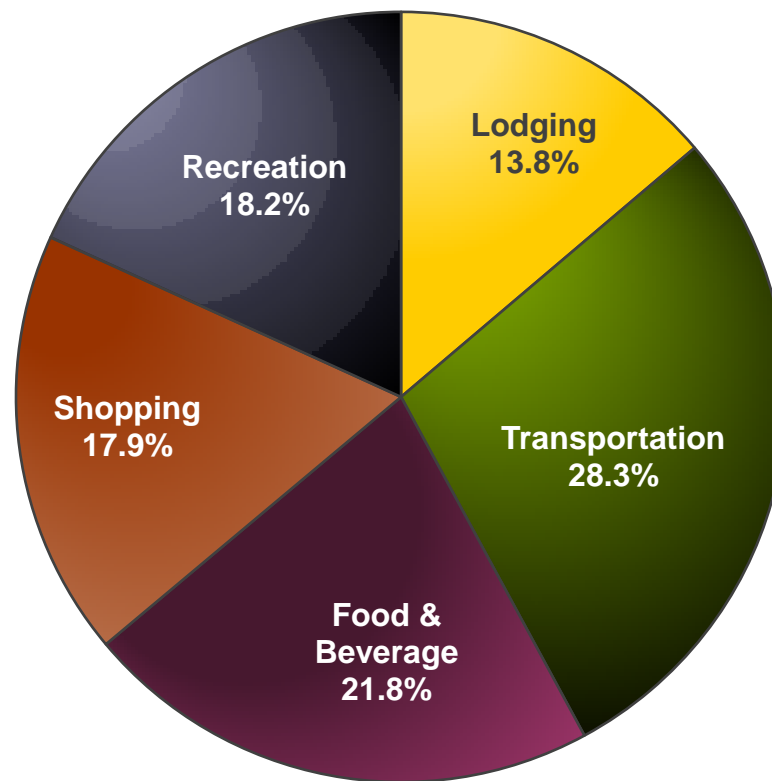
# Pittsburgh & Its Countryside – 2013 & 2014 Travel Economy impacts

Total Tourism Economy Impacts					
(Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2014					
Allegheny	6,010.6	59,977	2,571.9	610.7	619.7
Armstrong	95.7	1,142	39.4	7.7	7.4
Beaver	270.2	3,584	127.3	24.8	25.4
Butler	630.5	6,334	214.7	54.5	52.7
Greene	99.9	870	28.3	7.7	6.8
Indiana	185.0	2,391	73.1	16.1	15.8
Lawrence	126.1	1,682	57.9	11.1	11.0
Washington	802.0	9,037	325.8	75.5	77.1
Pittsburgh and Its Countryside	8,220.0	85,016	3,438.4	808.1	815.8
Percent Change	1.7%	0.5%	3.3%	1.6%	3.4%
2013					
Allegheny	5,903.3	59,655	2,481.8	600.2	598.2
Armstrong	96.2	1,138	38.6	7.7	7.2
Beaver	263.5	3,559	126.3	24.6	25.0
Butler	614.6	6,271	207.9	53.3	50.7
Greene	97.0	866	27.9	7.5	6.6
Indiana	189.0	2,380	71.9	16.4	15.6
Lawrence	124.4	1,671	56.3	10.9	10.6
Washington	797.2	9,040	318.2	75.1	75.4
Pittsburgh and Its Countryside	8,085.2	84,581	3,328.7	795.7	789.2

# Laurel Highlands

- The Laurel Highlands in southwestern PA is comprised of the following counties: Fayette, Somerset, and Westmorland.
- Travelers spent well over \$1.8 billion in the Laurel Highlands region in 2014 – a 2.8% increase from 2013 and a new record high (*in nominal dollars*). The increase was the second highest in percentage terms among the state's 11 tourism regions.
- As in 2013, the region had the second highest proportion of traveler dollars going to lodging and third highest to food & beverages and shopping among the state's tourism regions.

## Laurel Highlands Region 2014 Spending by Category



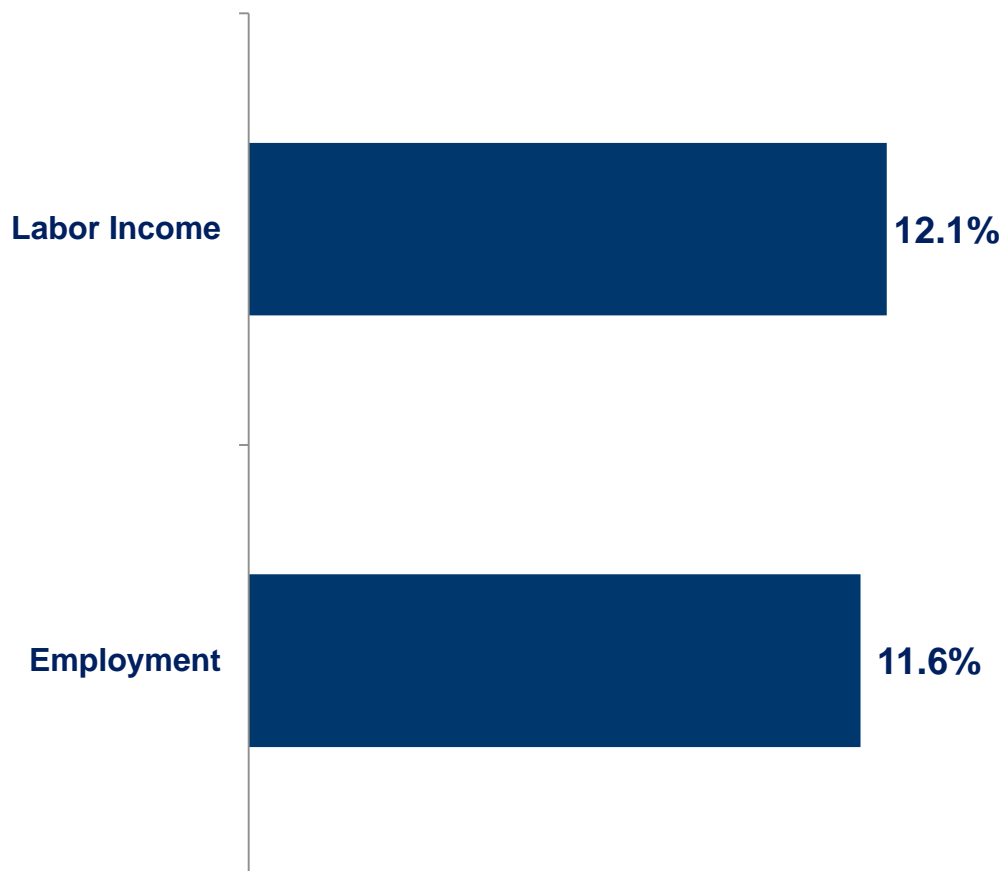
Source: Tourism Economics



# Laurel Highlands

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- The travel industry's share of the Laurel Highlands region total labor income was 12.1% in 2014 – up nearly a full percentage point since 2012.
- The travel industry supported 11.6% of the region's total job count – up from 11.5% in 2013. As in 2013, the region had the second highest percentage of travel-supported jobs among the state's tourism regions, while ranking 6<sup>th</sup> in the actual number of total travel-supported jobs.

**Travel Industry Share of Regional Economy**



# Laurel Highlands – Traveler spending & employment timelines

## Tourism Industry Spending

(Millions of dollars)

County	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Fayette	543.4	562.1	563.6	618.4	538.2	595.7	636.1	643.9	663.8	677.5
Somerset	322.0	309.6	325.2	357.2	306.9	330.1	371.2	378.7	380.2	387.6
Westmoreland	609.9	621.0	623.5	706.4	587.6	651.6	724.9	745.9	742.6	772.4
Laurel Highlands	1,475.3	1,492.8	1,512.2	1,682.0	1,432.6	1,577.3	1,732.2	1,768.5	1,786.6	1,837.5
Percent Change		1.2%	1.3%	11.2%	-14.8%	10.1%	9.8%	2.1%	1.0%	2.8%

## Tourism Industry Employment Impacts

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

# Laurel Highlands – Traveler spending by category

<b>Tourism Direct Sales</b>						
<b>(Millions of dollars)</b>						
<b>County</b>	<b>Lodging</b>	<b>Food &amp; beverage</b>	<b>Retail</b>	<b>Recreation</b>	<b>Transport</b>	<b>Total</b>
<b>2014</b>						
Fayette	117.7	149.0	117.6	127.7	165.5	677.5
Somerset	55.6	85.8	64.6	67.6	114.0	387.6
Westmoreland	82.5	165.7	146.0	138.6	239.6	772.4
<b>Laurel Highlands</b>	<b>255.8</b>	<b>400.6</b>	<b>328.3</b>	<b>333.9</b>	<b>519.0</b>	<b>1,837.5</b>
<b>Percent Change</b>	<b>8.8%</b>	<b>4.2%</b>	<b>3.8%</b>	<b>3.2%</b>	<b>-1.5%</b>	<b>2.8%</b>
<b>2013</b>						
Fayette	110.3	143.8	114.2	124.2	171.2	663.8
Somerset	51.1	82.6	62.7	66.6	117.2	380.2
Westmoreland	73.8	158.1	139.5	132.8	238.5	742.6
<b>Laurel Highlands</b>	<b>235.2</b>	<b>384.5</b>	<b>316.4</b>	<b>323.6</b>	<b>527.0</b>	<b>1,786.6</b>

# Laurel Highlands – 2013 & 2014 TSA spending

<b>Tourism Satellite Account Categories</b> (Millions of dollars)				
County	Visitor Spending	Government	Investment & Non-visitor PCE	Total Tourism Demand
<b>2014</b>				
Fayette	677.5	1.3	35.3	714.2
Somerset	387.6	1.0	20.2	408.9
Westmoreland	772.4	1.6	40.3	814.3
Laurel Highlands	1,837.5	3.9	95.9	1,937.3
Percent Change	2.8%	2.8%	1.3%	2.8%
<b>2013</b>				
Fayette	663.8	1.3	35.1	700.3
Somerset	380.2	1.0	20.1	401.3
Westmoreland	742.6	1.5	39.3	783.5
Laurel Highlands	1,786.6	3.8	94.6	1,885.1

# Laurel Highlands – 2013 & 2014 Travel Industry impacts

Tourism Industry Impacts					
(Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2014					
Fayette	677.5	5,836	163.9	38.9	35.6
Somerset	387.6	3,331	88.2	21.9	19.6
Westmoreland	772.4	5,764	138.0	39.7	33.8
Laurel Highlands	1,837.5	14,932	390.1	100.5	89.0
Percent Change	2.8%	0.8%	4.9%	2.4%	4.0%
2013					
Fayette	663.8	5,808	154.3	38.0	34.0
Somerset	380.2	3,285	86.8	21.9	19.3
Westmoreland	742.6	5,716	130.7	38.3	32.2
Laurel Highlands	1,786.6	14,809	371.8	98.1	85.5

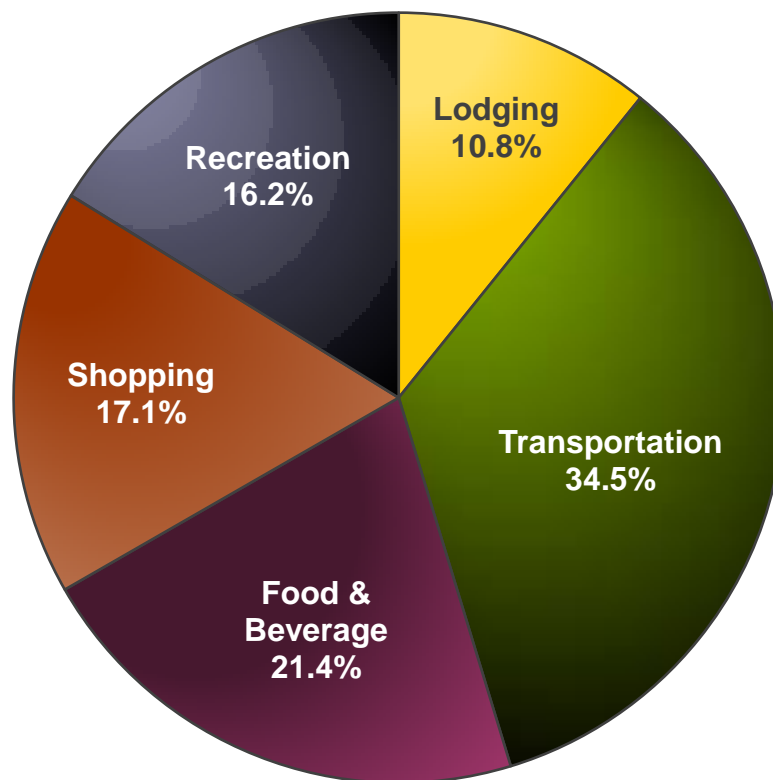
# Laurel Highlands – 2013 & 2014 Travel Economy impacts

Tourism Industry Impacts					
(Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2014					
Fayette	677.5	5,836	163.9	38.9	35.6
Somerset	387.6	3,331	88.2	21.9	19.6
Westmoreland	772.4	5,764	138.0	39.7	33.8
Laurel Highlands	1,837.5	14,932	390.1	100.5	89.0
Percent Change	2.8%	0.8%	4.9%	2.4%	4.0%
2013					
Fayette	663.8	5,808	154.3	38.0	34.0
Somerset	380.2	3,285	86.8	21.9	19.3
Westmoreland	742.6	5,716	130.7	38.3	32.2
Laurel Highlands	1,786.6	14,809	371.8	98.1	85.5

# Pennsylvania Wilds

- The Pennsylvania Wilds region is comprised of the following northern tier counties: Cameron, Clarion, Clearfield, Clinton, Elk, Forest, Jefferson, Lycoming, McKean, Potter, Tioga, and Warren.
- Travelers spent more than \$1.7 billion in the Pennsylvania Wilds region in 2014 – essentially the same amount as in 2013.
- Reflecting the relatively large impact business travel has had on the region (*related to Marcellus Shale drilling operations*), the region had the second highest proportion of traveler dollars spent on transportation and the third lowest amount spent on recreation in 2014. Source: Tourism Economics

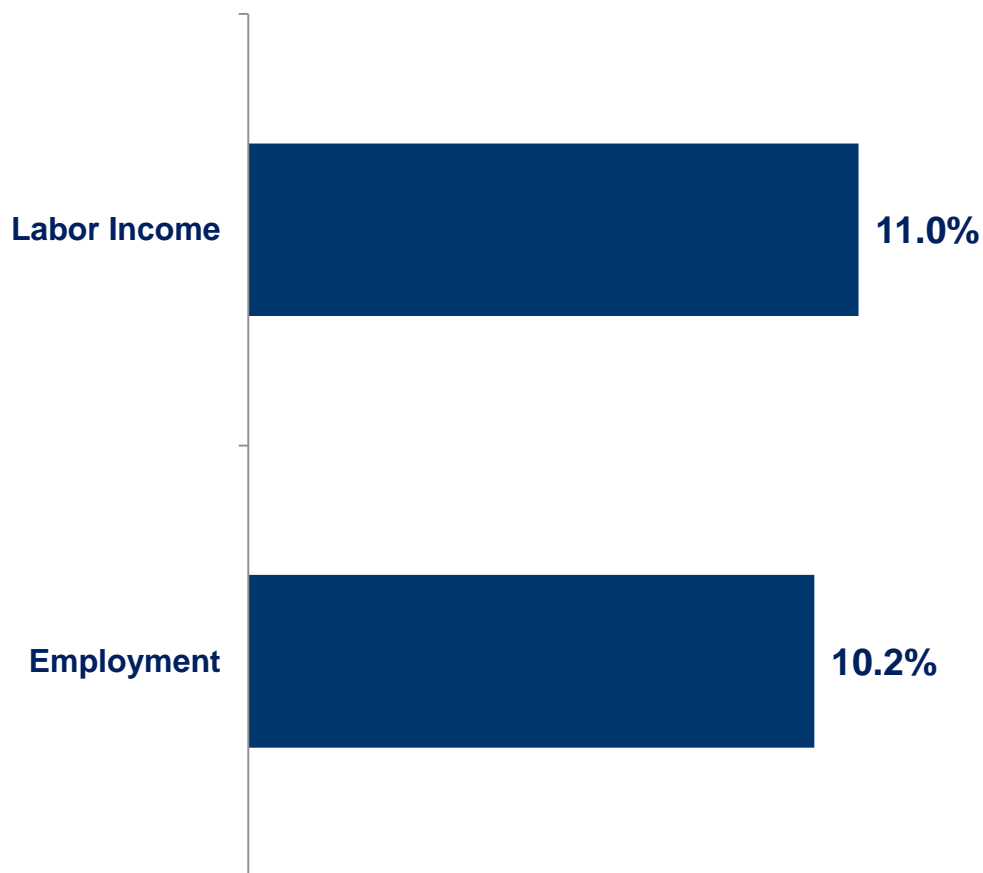
**Pennsylvania Wilds Region  
2014 Spending by Category**



# 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 travel industry was responsible for 11.0% of the labor income earned in the Pennsylvania Wilds region in 2014, which was above the industry's employment share of 10.2% - with both measures up from 2013.
- The region continued to rank tenth among PA's 11 tourism regions in the number of travel-supported jobs, and third in the industry's employment intensity in 2014.

**Travel Industry Share of Regional Economy**





# Pennsylvania Wilds – Traveler Spending & Employment Timelines

## Tourism Industry Spending

(Millions of dollars)

County	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Cameron	7.8	7.9	8.4	9.3	7.8	9.0	9.5	9.6	9.6	9.4
Clarion	90.1	94.3	101.7	112.0	93.5	108.1	112.6	118.6	121.5	115.4
Clearfield	222.6	227.5	233.5	250.3	212.3	248.9	261.9	264.3	265.5	276.5
Clinton	109.8	108.9	111.1	123.2	108.0	136.6	151.4	153.9	150.6	147.5
Elk	47.9	47.8	51.5	57.9	47.2	52.3	65.5	66.1	66.0	69.3
Forest	18.2	18.6	19.7	21.2	18.5	20.4	23.7	22.6	23.4	23.2
Jefferson	93.0	90.3	92.6	97.8	82.2	102.9	109.9	113.6	115.1	115.1
Lycoming	231.2	241.5	255.6	293.1	269.3	308.7	384.6	398.2	405.9	391.4
McKean	119.6	120.0	126.1	138.9	123.2	158.9	164.0	173.4	174.5	174.8
Potter	24.6	25.1	26.6	29.3	27.0	30.1	36.6	34.3	34.5	35.4
Tioga	144.1	139.5	149.1	159.1	139.5	171.2	192.4	193.4	187.6	190.9
Warren	121.5	127.9	137.0	157.8	137.7	149.3	160.8	169.4	169.3	173.9
Pennsylvania Wilds	1,230.4	1,249.3	1,312.9	1,450.1	1,266.2	1,496.4	1,673.0	1,717.3	1,723.4	1,722.9
Percent Change		1.5%	5.1%	10.4%	-12.7%	18.2%	11.8%	2.6%	0.4%	0.0%

## Tourism Industry Employment Impacts

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

# Pennsylvania Wilds – 2014 Traveler spending by category

<b>Tourism Direct Sales</b> <b>(Millions of dollars)</b>						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2014						
Cameron	0.5	1.7	1.7	2.4	3.1	9.4
Clarion	14.3	25.7	21.0	19.8	34.6	115.4
Clearfield	31.0	58.9	51.9	44.3	90.4	276.5
Clinton	14.2	32.2	23.7	25.0	52.3	147.5
Elk	8.2	17.0	13.4	10.5	20.1	69.3
Forest	3.2	4.9	4.8	4.1	6.2	23.2
Jefferson	8.8	20.9	16.7	22.5	46.3	115.1
Lycoming	52.0	89.6	67.5	55.8	126.5	391.4
McKean	18.2	34.1	26.6	27.2	68.6	174.8
Potter	5.0	7.5	6.0	5.7	11.2	35.4
Tioga	23.2	41.1	33.7	32.8	60.2	190.9
Warren	9.3	34.7	27.1	28.7	74.0	173.9
<b>Pennsylvania Wilds</b>	<b>188.0</b>	<b>368.4</b>	<b>294.2</b>	<b>278.8</b>	<b>593.5</b>	<b>1,722.9</b>
<b>Percent Change</b>	<b>1.0%</b>	<b>1.5%</b>	<b>1.2%</b>	<b>1.2%</b>	<b>-2.4%</b>	<b>0.0%</b>

# Pennsylvania Wilds – 2013 Traveler spending by category

<b>Tourism Direct Sales</b> <b>(Millions of dollars)</b>						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2013						
Cameron	0.5	1.7	1.7	2.4	3.2	9.6
Clarion	16.1	27.1	22.0	20.4	35.9	121.5
Clearfield	27.3	55.4	48.0	42.9	91.8	265.5
Clinton	14.8	32.4	23.7	25.5	54.1	150.6
Elk	7.2	16.1	12.7	9.8	20.3	66.0
Forest	3.2	4.9	4.8	4.1	6.4	23.4
Jefferson	9.2	21.0	16.9	21.9	46.0	115.1
Lycoming	56.7	92.4	69.9	55.4	131.5	405.9
McKean	17.2	33.5	26.3	27.3	70.1	174.5
Potter	4.6	7.2	5.8	5.3	11.6	34.5
Tioga	20.9	38.8	33.0	32.2	62.7	187.6
Warren	8.4	32.5	25.9	27.9	74.6	169.3
<b>Pennsylvania Wilds</b>	<b>186.2</b>	<b>362.9</b>	<b>290.7</b>	<b>275.3</b>	<b>608.2</b>	<b>1,723.4</b>

# Pennsylvania Wilds – 2014 TSA spending

<b>Tourism Satellite Account Categories</b> (Millions of dollars)				
County	Visitor Spending	Government	Investment & Non-visitor PCE	Total Tourism Demand
2014				
Cameron	9.4	0.0	0.5	9.9
Clarion	115.4	0.3	6.0	121.7
Clearfield	276.5	0.7	14.4	291.7
Clinton	147.5	0.3	7.7	155.5
Elk	69.3	0.1	3.6	73.1
Forest	23.2	0.1	1.2	24.5
Jefferson	115.1	0.2	6.0	121.3
Lycoming	391.4	0.9	20.4	412.7
McKean	174.8	0.3	9.1	184.3
Potter	35.4	0.1	1.8	37.3
Tioga	190.9	0.4	10.0	201.3
Warren	173.9	0.2	9.1	183.2
<b>Pennsylvania Wilds</b>	<b>1,722.9</b>	<b>3.7</b>	<b>89.9</b>	<b>1,816.5</b>
<b>Percent Change</b>	<b>0.0%</b>	<b>-5.7%</b>	<b>-1.5%</b>	<b>-0.1%</b>

# Pennsylvania Wilds – 2013 TSA Spending

<b>Tourism Satellite Account Categories</b>				
<b>(Millions of dollars)</b>				
<b>County</b>	<b>Visitor Spending</b>	<b>Government</b>	<b>Investment &amp; Non-visitor PCE</b>	<b>Total Tourism Demand</b>
<b>2013</b>				
<b>Cameron</b>	<b>9.6</b>	<b>0.0</b>	<b>0.5</b>	<b>10.1</b>
<b>Clarion</b>	<b>121.5</b>	<b>0.3</b>	<b>6.4</b>	<b>128.2</b>
<b>Clearfield</b>	<b>265.5</b>	<b>0.7</b>	<b>14.1</b>	<b>280.2</b>
<b>Clinton</b>	<b>150.6</b>	<b>0.3</b>	<b>8.0</b>	<b>158.9</b>
<b>Elk</b>	<b>66.0</b>	<b>0.1</b>	<b>3.5</b>	<b>69.6</b>
<b>Forest</b>	<b>23.4</b>	<b>0.1</b>	<b>1.2</b>	<b>24.7</b>
<b>Jefferson</b>	<b>115.1</b>	<b>0.2</b>	<b>6.1</b>	<b>121.4</b>
<b>Lycoming</b>	<b>405.9</b>	<b>1.2</b>	<b>21.5</b>	<b>428.6</b>
<b>McKean</b>	<b>174.5</b>	<b>0.3</b>	<b>9.2</b>	<b>184.0</b>
<b>Potter</b>	<b>34.5</b>	<b>0.1</b>	<b>1.8</b>	<b>36.4</b>
<b>Tioga</b>	<b>187.6</b>	<b>0.4</b>	<b>9.9</b>	<b>197.9</b>
<b>Warren</b>	<b>169.3</b>	<b>0.2</b>	<b>9.0</b>	<b>178.5</b>
<b>Pennsylvania Wilds</b>	<b>1,723.4</b>	<b>4.0</b>	<b>91.2</b>	<b>1,818.6</b>

# Pennsylvania Wilds – 2014 Travel Industry impacts

Tourism Industry Impacts					
(Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2014					
Cameron	9.4	76	1.5	0.5	0.4
Clarion	115.4	1,051	23.6	6.2	5.5
Clearfield	276.5	1,817	48.6	14.3	12.0
Clinton	147.5	1,045	28.0	7.7	6.7
Elk	69.3	557	11.5	3.5	2.9
Forest	23.2	138	3.7	1.2	1.0
Jefferson	115.1	807	22.5	6.1	5.3
Lycoming	391.4	2,961	79.0	21.1	18.4
McKean	174.8	1,144	29.8	8.8	7.5
Potter	35.4	242	5.8	1.8	1.5
Tioga	190.9	1,535	38.3	10.3	8.9
Warren	173.9	1,147	26.5	8.4	7.0
Pennsylvania Wilds	1,722.9	12,519	318.9	89.7	77.0
Percent Change	0.0%	0.5%	2.5%	-0.5%	1.5%

# Pennsylvania Wilds – 2013 Travel Industry impacts

Tourism Industry Impacts					
(Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2013					
Cameron	9.6	76	1.4	0.5	0.4
Clarion	121.5	1,046	23.3	6.5	5.5
Clearfield	265.5	1,778	46.8	13.8	11.5
Clinton	150.6	1,040	26.9	7.8	6.6
Elk	66.0	554	10.7	3.3	2.7
Forest	23.4	137	3.7	1.2	1.0
Jefferson	115.1	804	22.2	6.1	5.3
Lycoming	405.9	2,973	76.4	21.9	18.3
McKean	174.5	1,138	29.1	8.8	7.4
Potter	34.5	241	5.7	1.8	1.5
Tioga	187.6	1,530	38.6	10.2	8.9
Warren	169.3	1,141	26.2	8.3	6.9
Pennsylvania Wilds	1,723.4	12,456	311.2	90.2	75.9

# Pennsylvania Wilds – 2014 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
2014					
Cameron	9.9	129	3.7	0.8	0.8
Clarion	121.7	1,640	49.4	11.0	11.0
Clearfield	291.7	2,908	100.3	25.0	24.1
Clinton	155.5	1,634	56.1	13.6	13.5
Elk	73.1	911	26.6	6.1	5.9
Forest	24.5	231	8.1	2.0	1.9
Jefferson	121.3	1,356	48.8	10.7	10.7
Lycoming	412.7	4,588	156.4	37.0	37.0
McKean	184.3	1,765	59.1	15.5	15.0
Potter	37.3	408	13.3	3.1	3.0
Tioga	201.3	2,274	72.5	18.0	18.0
Warren	183.2	1,802	55.6	14.8	14.1
Pennsylvania Wilds	1,816.5	19,646	649.9	157.6	154.9
Percent Change	-0.1%	0.3%	1.6%	-0.5%	1.5%



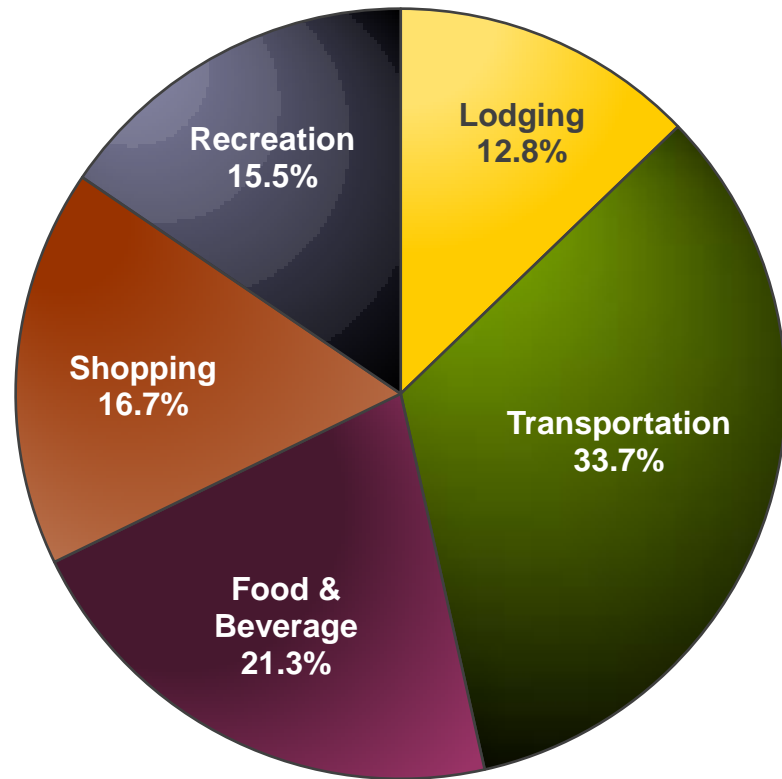
# Pennsylvania Wilds – 2013 Travel Economy impacts

Total Tourism Economy Impacts					
(Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2013					
Cameron	10.1	129	3.6	0.8	0.8
Clarion	128.2	1,635	49.1	11.5	11.2
Clearfield	280.2	2,861	97.9	24.2	23.2
Clinton	158.9	1,629	54.6	13.8	13.3
Elk	69.6	908	25.3	5.8	5.5
Forest	24.7	230	8.1	2.1	1.9
Jefferson	121.4	1,353	48.5	10.8	10.6
Lycoming	428.6	4,606	152.9	38.2	36.8
McKean	184.0	1,759	58.2	15.5	14.8
Potter	36.4	407	13.2	3.1	2.9
Tioga	197.9	2,269	73.1	18.1	17.9
Warren	178.5	1,795	55.3	14.6	13.8
Pennsylvania Wilds	1,818.6	19,581	639.6	158.4	152.7

# The Alleghenies

- The Alleghenies is comprised of the following counties: Bedford, Blair, Cambria, Centre, Fulton, Huntingdon, Juniata, and Mifflin.
- Travelers spent more than \$1.9 billion in The Alleghenies region in 2014 – a 1.7% increase from 2013.
- As in 2013, visitors to the region continued to spend a relatively high percentage of their travel dollars on transportation and lodging with the region ranking 3<sup>rd</sup> and 4<sup>th</sup>, respectively, in the share of traveler dollars spent on these categories among the state's tourism regions, and less on recreation and retail purchases.

## The Alleghenies Region 2014 Spending by Category

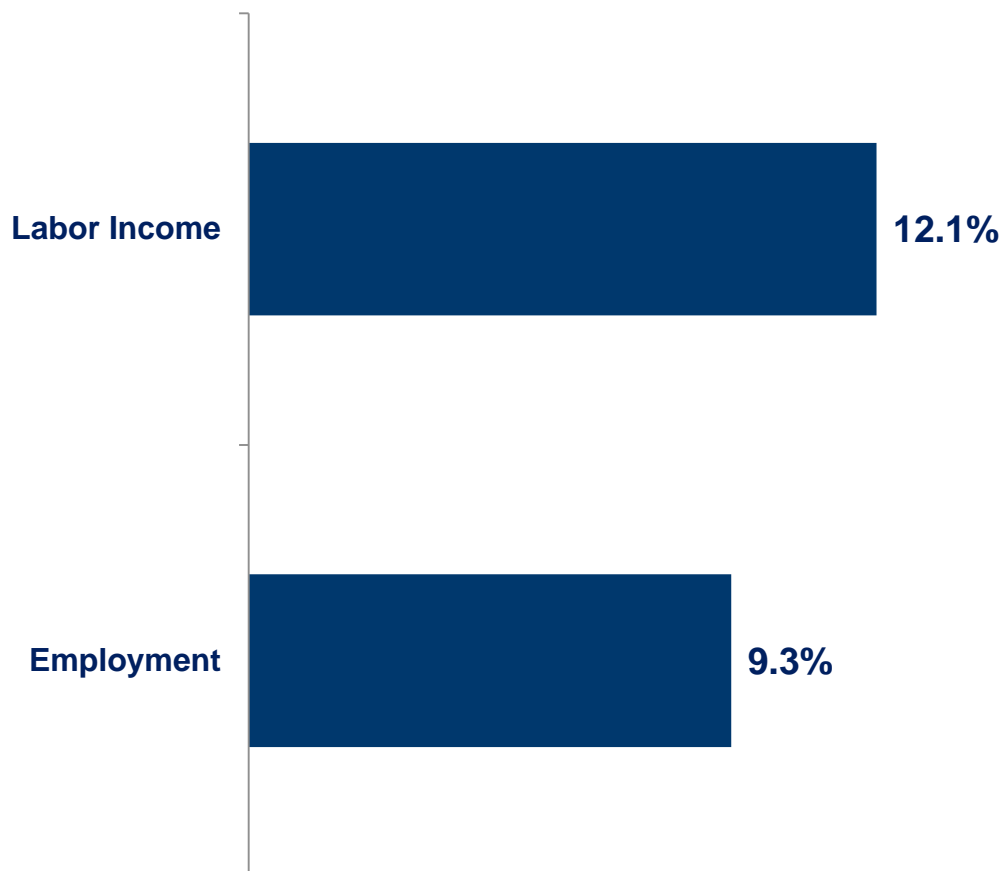


Source: Tourism Economics

# The Alleghenies

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- The travel industry was responsible for 12.1% of the labor income earned in The Alleghenies region in 2014 – the third highest share of PA's 11 tourism regions and well above the region's travel industry employment share of 9.3%.
- The region continued to rank 6<sup>th</sup> among the state's tourism regions in terms of the share of travel-supported jobs relative to the region's total employment in 2014.

## Travel Industry Share of Regional Economy



# The Alleghenies – Traveler spending & employment timelines

## Tourism Industry Spending

(Millions of dollars)

County	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Bedford	244.2	243.5	259.6	286.0	239.0	263.0	273.2	280.2	282.9	284.0
Blair	257.8	260.4	278.1	296.8	249.3	271.2	295.4	307.4	309.6	313.2
Cambria	235.2	232.3	244.3	280.9	238.5	257.6	290.9	303.4	301.0	303.2
Centre	498.7	511.2	531.4	616.4	545.6	588.7	649.5	654.3	694.1	720.4
Fulton	18.8	19.2	20.4	22.4	17.4	19.3	21.7	23.7	23.5	23.2
Huntingdon	129.5	125.7	135.3	146.6	129.1	144.1	153.2	162.8	161.7	160.4
Juniata	28.0	28.6	30.3	33.4	28.5	31.0	34.9	36.3	36.8	36.5
Mifflin	57.6	58.4	60.8	67.0	54.4	58.9	62.8	63.5	64.9	65.2
<b>The Alleghenies</b>	<b>1,469.8</b>	<b>1,479.2</b>	<b>1,560.1</b>	<b>1,749.6</b>	<b>1,501.9</b>	<b>1,633.9</b>	<b>1,781.6</b>	<b>1,831.6</b>	<b>1,874.4</b>	<b>1,906.1</b>
<b>Percent Change</b>		<b>0.6%</b>	<b>5.5%</b>	<b>12.1%</b>	<b>-14.2%</b>	<b>8.8%</b>	<b>9.0%</b>	<b>2.8%</b>	<b>2.3%</b>	<b>1.7%</b>

## Tourism Industry Employment Impacts

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

# The Alleghenies – Traveler spending by category

Tourism Direct Sales						
(Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2014						
Bedford	42.6	55.4	43.5	43.8	98.7	284.0
Blair	30.6	65.4	54.4	49.0	113.9	313.2
Cambria	23.8	59.6	48.3	47.9	123.6	303.2
Centre	125.1	160.3	122.3	103.8	208.8	720.4
Fulton	2.0	4.8	4.1	4.6	7.8	23.2
Huntingdon	13.4	35.5	27.1	29.7	54.7	160.4
Juniata	1.9	8.2	6.2	7.3	13.0	36.5
Mifflin	6.0	17.0	12.1	8.6	21.5	65.2
The Alleghenies	245.4	406.1	317.9	294.7	642.0	1,906.1
Percent Change	6.9%	3.7%	2.9%	1.8%	-2.0%	1.7%
2013						
Bedford	40.1	53.6	43.0	43.5	102.7	282.9
Blair	29.4	63.5	53.8	48.9	114.0	309.6
Cambria	22.8	58.1	47.8	47.9	124.4	301.0
Centre	114.7	151.7	116.1	99.4	212.2	694.1
Fulton	1.9	4.7	4.0	4.7	8.2	23.5
Huntingdon	13.1	35.4	26.5	29.7	57.0	161.7
Juniata	1.8	8.1	6.1	7.0	13.7	36.8
Mifflin	5.6	16.4	11.8	8.6	22.5	64.9
The Alleghenies	229.5	391.5	309.0	289.6	654.9	1,874.4

# The Alleghenies – 2013 & 2014 TSA Spending

<b>Tourism Satellite Account Categories</b>				
<b>(Millions of dollars)</b>				
<b>County</b>	<b>Visitor Spending</b>	<b>Government</b>	<b>Investment &amp; Non-visitor PCE</b>	<b>Total Tourism Demand</b>
<b>2014</b>				
Bedford	284.0	0.6	14.8	299.4
Blair	313.2	0.7	16.3	330.2
Cambria	303.2	0.5	15.8	319.5
Centre	720.4	2.1	37.6	760.1
Fulton	23.2	0.0	1.2	24.5
Huntingdon	160.4	0.3	8.4	169.0
Juniata	36.5	0.0	1.9	38.5
Mifflin	65.2	0.1	3.4	68.7
<b>The Alleghenies</b>	<b>1,906.1</b>	<b>4.4</b>	<b>99.4</b>	<b>2,009.9</b>
<b>Percent Change</b>	<b>1.7%</b>	<b>1.1%</b>	<b>0.2%</b>	<b>1.6%</b>
<b>2013</b>				
Bedford	282.9	0.6	15.0	298.5
Blair	309.6	0.7	16.4	326.6
Cambria	301.0	0.5	15.9	317.5
Centre	694.1	2.0	36.8	732.9
Fulton	23.5	0.0	1.2	24.8
Huntingdon	161.7	0.4	8.6	170.6
Juniata	36.8	0.1	1.9	38.8
Mifflin	64.9	0.1	3.4	68.4
<b>The Alleghenies</b>	<b>1,874.4</b>	<b>4.3</b>	<b>99.2</b>	<b>1,978.0</b>

# The Alleghenies – 2013 & 2014 Travel Industry impacts

Tourism Industry Impacts					
(Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2014					
Bedford	284.0	2,004	53.9	14.9	12.9
Blair	313.2	2,588	71.9	17.7	15.9
Cambria	303.2	2,042	66.0	16.6	14.9
Centre	720.4	4,875	142.5	38.9	33.5
Fulton	23.2	156	3.7	1.1	1.0
Huntingdon	160.4	1,335	33.2	8.6	7.7
Juniata	36.5	224	4.7	1.7	1.4
Mifflin	65.2	608	13.8	3.5	3.2
The Alleghenies	1,906.1	13,832.5	389.7	103.0	90.3
Percent Change	1.7%	-0.3%	2.9%	0.9%	2.5%
2013					
Bedford	282.9	1,978	53.3	15.0	12.8
Blair	309.6	2,609	70.6	17.6	15.7
Cambria	301.0	2,053	64.6	16.6	14.7
Centre	694.1	4,923	136.0	37.8	32.0
Fulton	23.5	155	3.6	1.1	0.9
Huntingdon	161.7	1,329	32.3	8.8	7.5
Juniata	36.8	223	4.6	1.7	1.3
Mifflin	64.9	605	13.6	3.5	3.1
The Alleghenies	1,874.4	13,875.5	378.6	102.1	88.1

# The Alleghenies – 2013 & 2014 Travel Economy impacts

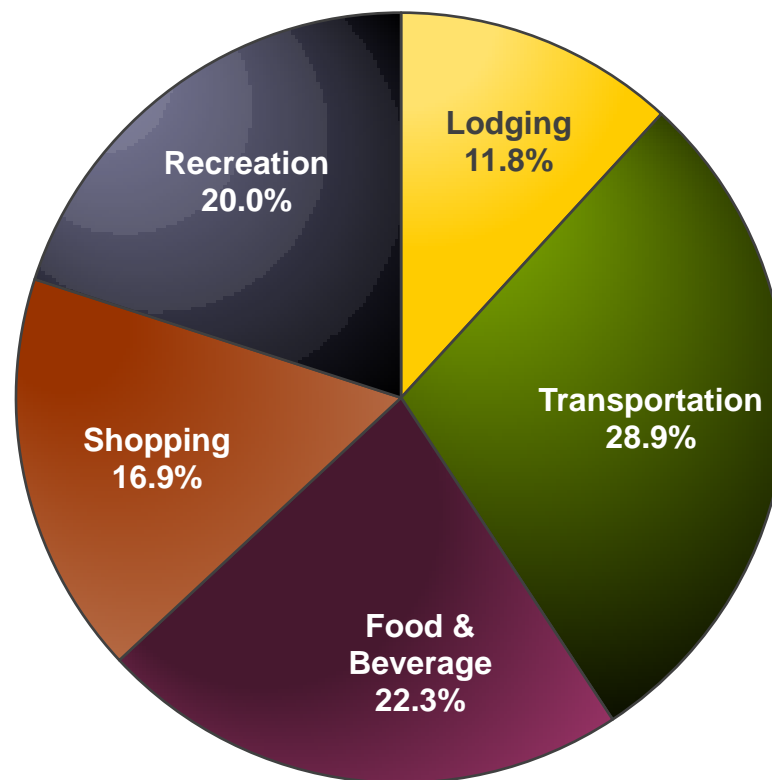
Total Tourism Economy Impacts					
(Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2014					
Bedford	299.4	2,958	100.0	26.2	25.9
Blair	330.2	4,098	144.9	31.1	32.1
Cambria	319.5	3,507	140.6	29.4	30.0
Centre	760.1	7,365	267.9	68.1	67.4
Fulton	24.5	285	9.4	2.0	1.9
Huntingdon	169.0	2,041	65.7	15.2	15.4
Juniata	38.5	451	14.6	2.9	2.7
Mifflin	68.7	1,057	33.6	6.3	6.4
The Alleghenies	2,009.9	21,761.1	776.8	181.2	181.8
Percent Change	1.6%	-0.3%	2.0%	0.9%	2.5%
2013					
Bedford	298.5	2,928	99.4	26.4	25.7
Blair	326.6	4,126	143.3	31.1	31.6
Cambria	317.5	3,523	138.6	29.4	29.5
Centre	732.9	7,431	258.7	66.1	64.5
Fulton	24.8	284	9.3	2.0	1.9
Huntingdon	170.6	2,035	64.4	15.4	15.2
Juniata	38.8	450	14.4	3.0	2.7
Mifflin	68.4	1,054	33.4	6.3	6.3
The Alleghenies	1,978.0	21,830.8	761.5	179.6	177.3



# Valleys of the Susquehanna

- The Valleys of the Susquehanna region is comprised of the following counties: Columbia, Montour, Northumberland, Snyder, and Union.
- Travelers spent \$617.6 million in the region in 2014 – the second highest amount on record despite a 1.1% decrease from 2013.
- The Valleys of the Susquehanna region continued to have the highest proportion of traveler dollars spent on food & beverages among the state's 11 tourism regions in 2014, and had the second highest share spent on recreation.

## Valleys of the Susquehanna Region 2014 Spending by Category

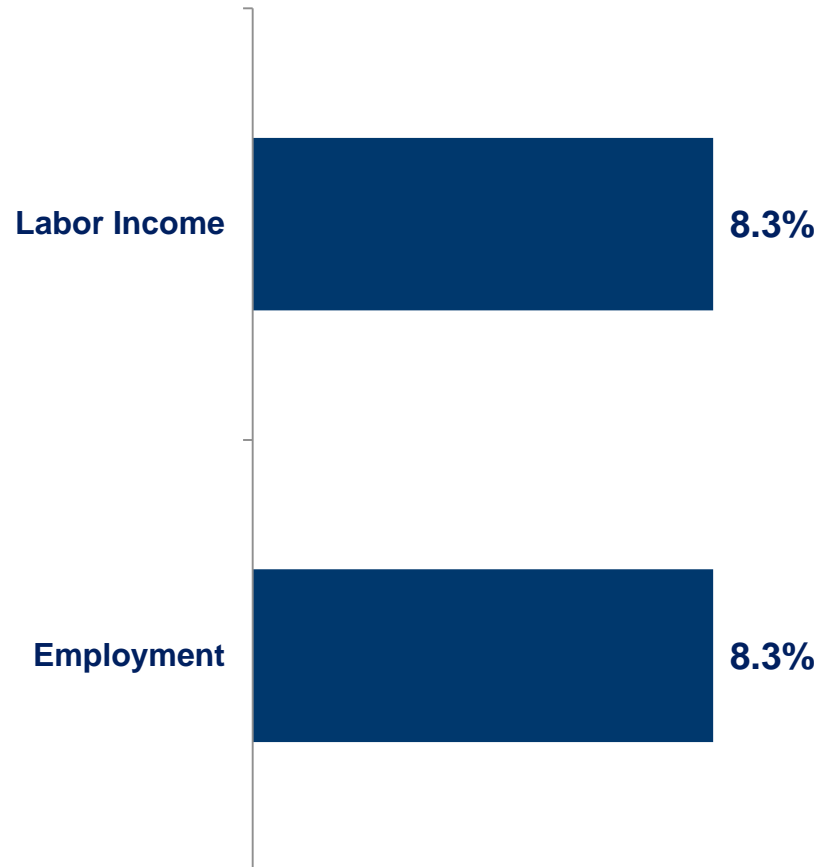


Source: Tourism Economics

# Valleys of the Susquehanna

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- The travel industry was responsible for 8.3% of the region's labor income and the same percentage of the region's employment in 2014.
- The region continued to have the smallest number of travel-supported jobs among the state's 11 tourism regions in 2014, with the travel industry's employment share ranking 8<sup>th</sup> among the regions and its travel-supported labor income share ranking 9<sup>th</sup>.

**Travel Industry Share of Regional Economy**



# Valleys of the Susquehanna – Traveler spending & employment timelines

## Tourism Industry Spending

(Millions of dollars)

County	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Columbia	114.5	117.8	125.5	140.3	114.5	127.6	150.6	150.6	153.7	153.7
Montour	84.8	84.5	84.9	93.5	79.2	88.0	97.4	105.3	102.3	97.3
Northumberland	96.5	99.5	102.9	114.4	99.1	113.3	118.4	118.3	124.3	125.1
Snyder	79.8	81.0	84.3	90.3	74.9	83.5	90.6	90.2	95.3	98.8
Union	110.2	113.4	118.0	136.7	115.7	124.3	144.8	157.5	149.2	142.7
Valleys of the Susquehanna	485.7	496.1	515.6	575.2	483.3	536.6	601.8	622.0	624.7	617.6
Percent Change		2.1%	3.9%	11.6%	-16.0%	11.0%	12.1%	3.4%	0.4%	-1.1%

## Tourism Industry Employment Impacts

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

# Valleys of the Susquehanna – Traveler spending by category

<b>Tourism Direct Sales</b> (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
<b>2014</b>						
Columbia	20.7	37.2	26.0	26.0	43.9	153.7
Montour	14.7	20.0	15.4	19.2	28.0	97.3
Northumberland	4.3	22.7	16.5	36.8	44.8	125.1
Snyder	11.3	22.8	20.1	19.8	24.8	98.8
Union	22.5	35.1	26.6	21.4	37.2	142.7
Valleys of the Susquehanna	73.5	137.7	104.5	123.1	178.7	617.6
Percent Change	1.0%	1.1%	-0.6%	-0.4%	-4.4%	-1.1%
<b>2013</b>						
Columbia	19.7	36.2	26.3	25.9	45.6	153.7
Montour	15.1	20.4	15.9	20.4	30.4	102.3
Northumberland	4.1	22.2	15.9	35.8	46.3	124.3
Snyder	10.7	21.8	19.7	18.4	24.6	95.3
Union	23.1	35.6	27.4	23.1	40.0	149.2
Valleys of the Susquehanna	72.7	136.2	105.1	123.7	187.0	624.7

# Valleys of the Susquehanna – 2013 & 2014 TSA Spending

<b>Tourism Satellite Account Categories</b> (Millions of dollars)				
County	Visitor Spending	Government	Investment & Non-visitor PCE	Total Tourism Demand
<b>2014</b>				
Columbia	153.7	0.4	8.0	162.2
Montour	97.3	0.3	5.1	102.6
Northumberland	125.1	0.1	6.5	131.7
Snyder	98.8	0.2	5.2	104.2
Union	142.7	0.4	7.4	150.6
Valleys of the Susquehanna	617.6	1.5	32.2	651.3
Percent Change	-1.1%	-2.6%	-2.6%	-1.2%
<b>2013</b>				
Columbia	153.7	0.4	8.1	162.2
Montour	102.3	0.3	5.4	108.0
Northumberland	124.3	0.1	6.6	130.9
Snyder	95.3	0.3	5.0	100.6
Union	149.2	0.5	7.9	157.6
Valleys of the Susquehanna	624.7	1.5	33.1	659.3

# Valleys of the Susquehanna – 2013 & 2014 Travel Industry impacts

Tourism Industry Impacts					
(Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2014					
Columbia	153.7	1,290	29.2	8.2	7.0
Montour	97.3	889	21.0	5.4	4.8
Northumberland	125.1	1,078	29.5	7.0	6.5
Snyder	98.8	744	16.0	4.9	4.1
Union	142.7	1,229	30.1	7.9	6.9
Valleys of the Susquehanna	617.6	5,228.8	125.8	33.4	29.2
Percent Change	-1.1%	0.5%	1.8%	-1.3%	0.6%
2013					
Columbia	153.7	1,291	28.9	8.2	6.9
Montour	102.3	884	20.5	5.6	4.8
Northumberland	124.3	1,066	28.8	7.0	6.4
Snyder	95.3	740	15.6	4.9	4.0
Union	149.2	1,224	29.7	8.2	6.9
Valleys of the Susquehanna	624.7	5,205.0	123.5	33.9	29.0

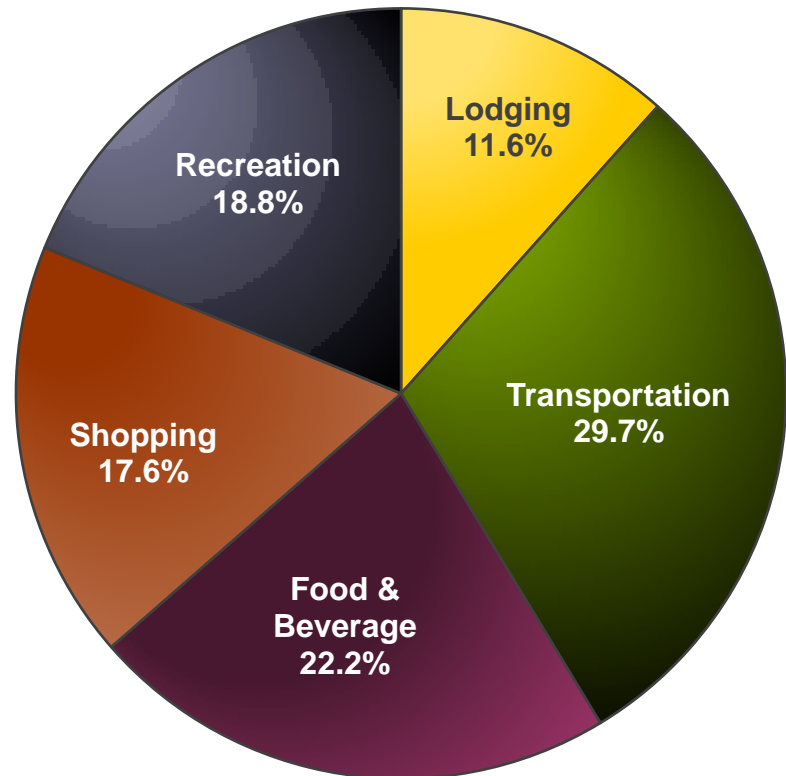
# Valleys of the Susquehanna – 2013 & 2014 Travel Economy Impacts

Total Tourism Economy Impacts					
(Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2014					
Columbia	162.2	2,067	63.4	14.3	14.0
Montour	102.6	1,287	38.9	9.5	9.6
Northumberland	131.7	1,908	68.7	12.4	13.0
Snyder	104.2	1,208	35.9	8.7	8.2
Union	150.6	1,882	59.9	13.8	13.9
Valleys of the Susquehanna	651.3	8,351.0	266.8	58.7	58.8
Percent Change	-1.2%	0.3%	1.1%	-1.4%	0.6%
2013					
Columbia	162.2	2,069	63.1	14.4	14.0
Montour	108.0	1,282	38.2	9.9	9.6
Northumberland	130.9	1,895	67.8	12.4	12.8
Snyder	100.6	1,204	35.4	8.5	8.0
Union	157.6	1,877	59.4	14.3	14.0
Valleys of the Susquehanna	659.3	8,326.7	263.9	59.5	58.4

# Upstate PA

- The Upstate PA region is comprised of the following counties: Bradford, Lackawanna, Luzerne, Schuylkill, Sullivan, Susquehanna, and Wyoming.
- Travelers spent nearly \$2.2 billion in the Upstate PA region in 2014 – a 0.2% increase from 2012 and a new record high (*in nominal dollars*).
- The Upstate PA region continued to have the second highest share of spending by travelers on food & beverages among the state's 11 tourism regions in 2014.

## Upstate PA Region 2014 Spending by Category



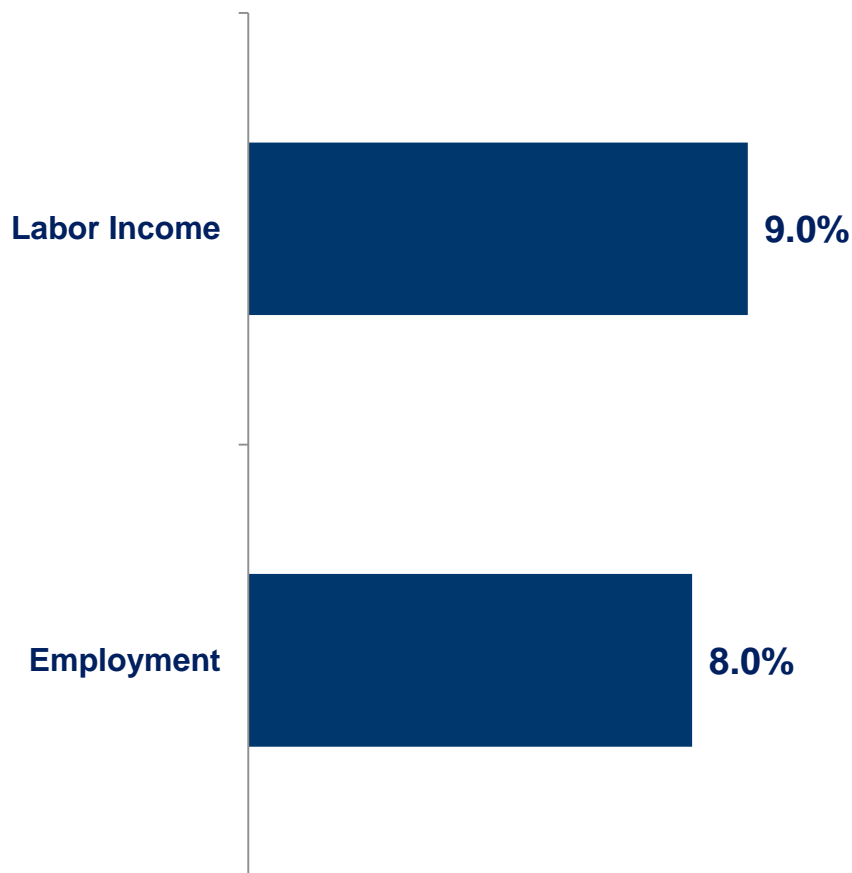
Source: Tourism Economics



# Upstate PA

- The chart shows the travel economy's share (including indirect and induced impacts) of the regional total for both labor income and employment.
- The travel-related labor income share for the Upstate PA region was 9.0% in 2014, above the region's 8.0% employment share.
- As in the previous two years, the travel industry's share of regional employment was the second lowest of the state's 11 tourism regions, while the region continued to rank 5<sup>th</sup> in the actual number of travel-supported jobs.

**Travel Industry Share of Regional Economy**



# Upstate PA – Traveler spending & employment timelines

Tourism Industry Spending										
(Millions of dollars)										
County	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Bradford	125.2	126.4	134.7	148.3	136.3	170.0	200.6	225.3	223.1	227.6
Lackawanna	478.4	482.8	514.4	566.5	483.1	536.5	615.8	632.1	648.4	633.3
Luzerne	674.5	702.6	752.5	818.6	708.3	795.5	870.6	870.2	859.9	875.1
Schuylkill	164.3	168.8	177.5	195.2	158.5	159.2	176.7	195.7	196.3	199.0
Sullivan	12.7	12.3	12.9	14.4	13.1	16.0	18.7	19.7	19.1	18.6
Susquehanna	107.5	112.6	121.5	140.4	122.7	141.6	151.9	164.3	163.1	161.6
Wyoming	33.2	35.3	37.0	40.3	36.8	41.3	53.1	61.2	64.1	63.5
UPSTATE PA	1,596.0	1,640.7	1,750.4	1,923.7	1,658.6	1,860.2	2,087.4	2,168.5	2,174.1	2,178.7
Percent Change		2.8%	6.7%	9.9%	-13.8%	12.2%	12.2%	3.9%	0.3%	0.2%
Tourism Industry Employment Impacts										
County	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Bradford	1,017	1,014	1,011	1,031	1,037	1,252	1,326	1,333	1,402	1,410
Lackawanna	4,537	4,626	4,769	4,855	4,563	4,752	4,882	5,006	5,131	5,183
Luzerne	5,789	6,028	6,142	6,253	5,978	6,275	6,534	6,619	6,754	7,056
Schuylkill	1,207	1,215	1,254	1,287	1,187	1,165	1,177	1,203	1,219	1,225
Sullivan	109	111	116	118	117	138	148	160	173	174
Susquehanna	1,022	1,053	1,059	1,044	1,002	1,024	1,061	1,060	1,105	1,110
Wyoming	349	351	359	364	365	362	379	400	421	423
UPSTATE PA	14,030	14,399	14,709	14,952	14,250	14,967	15,507	15,781	16,205	16,580
Percent Change		2.6%	2.2%	1.7%	-4.7%	5.0%	3.6%	1.8%	2.7%	2.3%

# Upstate PA – Traveler spending by category

<b>Tourism Direct Sales</b> <b>(Millions of dollars)</b>						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2014						
Bradford	26.4	48.2	35.5	37.1	80.3	227.6
Lackawanna	81.8	145.6	127.7	110.4	167.7	633.3
Luzerne	105.7	191.0	147.3	185.7	245.5	875.1
Schuylkill	17.4	47.9	34.2	31.3	68.2	199.0
Sullivan	2.2	3.1	2.6	5.4	5.3	18.6
Susquehanna	12.5	33.7	25.1	28.9	61.5	161.6
Wyoming	9.0	13.8	11.8	10.0	18.8	63.5
UPSTATE PA	255.0	483.3	384.2	408.8	647.4	2,178.7
Percent Change	5.5%	2.8%	1.6%	0.4%	-4.4%	0.2%
2013						
Bradford	23.5	46.1	34.0	36.4	83.2	223.1
Lackawanna	82.8	145.3	129.6	113.3	177.4	648.4
Luzerne	96.9	182.9	142.8	182.6	254.7	859.9
Schuylkill	15.8	45.8	33.2	30.5	71.0	196.3
Sullivan	2.2	3.2	2.7	5.4	5.6	19.1
Susquehanna	11.6	33.3	24.0	28.8	65.4	163.1
Wyoming	8.8	13.5	11.8	10.1	19.9	64.1
UPSTATE PA	241.6	470.2	378.1	407.1	677.2	2,174.1

# Upstate PA – 2013 & 2014 TSA spending

<b>Tourism Satellite Account Categories</b>				
<b>(Millions of dollars)</b>				
<b>County</b>	<b>Visitor Spending</b>	<b>Government</b>	<b>Investment &amp; Non-visitor PCE</b>	<b>Total Tourism Demand</b>
<b>2014</b>				
Bradford	227.6	0.6	11.9	240.0
Lackawanna	633.3	3.3	33.0	669.6
Luzerne	875.1	3.0	45.7	923.8
Schuylkill	199.0	0.3	10.4	209.7
Sullivan	18.6	0.0	1.0	19.6
Susquehanna	161.6	0.3	8.4	170.3
Wyoming	63.5	0.2	3.3	67.0
<b>UPSTATE PA</b>	<b>2,178.7</b>	<b>7.8</b>	<b>113.7</b>	<b>2,300.1</b>
<b>Percent Change</b>	<b>0.2%</b>	<b>3.2%</b>	<b>-1.3%</b>	<b>0.1%</b>
<b>2013</b>				
Bradford	223.1	0.5	11.8	235.5
Lackawanna	648.4	3.4	34.3	686.1
Luzerne	859.9	2.8	45.5	908.2
Schuylkill	196.3	0.3	10.4	207.0
Sullivan	19.1	0.0	1.0	20.2
Susquehanna	163.1	0.2	8.6	172.0
Wyoming	64.1	0.2	3.4	67.8
<b>UPSTATE PA</b>	<b>2,174.1</b>	<b>7.5</b>	<b>115.1</b>	<b>2,296.8</b>

# Upstate PA – 2013 & 2014 Travel Industry impacts

Tourism Industry Impacts					
(Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2014					
Bradford	227.6	1,410	34.9	11.2	9.2
Lackawanna	633.3	5,183	124.5	35.6	29.3
Luzerne	875.1	7,056	232.0	53.5	48.7
Schuylkill	199.0	1,225	40.5	10.6	9.4
Sullivan	18.6	174	3.6	1.0	0.9
Susquehanna	161.6	1,110	24.1	7.8	6.4
Wyoming	63.5	423	11.0	3.3	2.7
UPSTATE PA	2,178.7	16,579.9	470.6	123.0	106.6
Percent Change	0.2%	2.3%	11.1%	3.0%	6.5%
2013					
Bradford	223.1	1,402	34.1	11.1	9.0
Lackawanna	648.4	5,131	124.4	36.5	29.6
Luzerne	859.9	6,754	189.1	49.2	42.6
Schuylkill	196.3	1,219	38.2	10.4	9.0
Sullivan	19.1	173	3.6	1.0	0.9
Susquehanna	163.1	1,105	23.8	7.9	6.4
Wyoming	64.1	421	10.4	3.3	2.7
UPSTATE PA	2,174.1	16,204.6	423.7	119.4	100.1

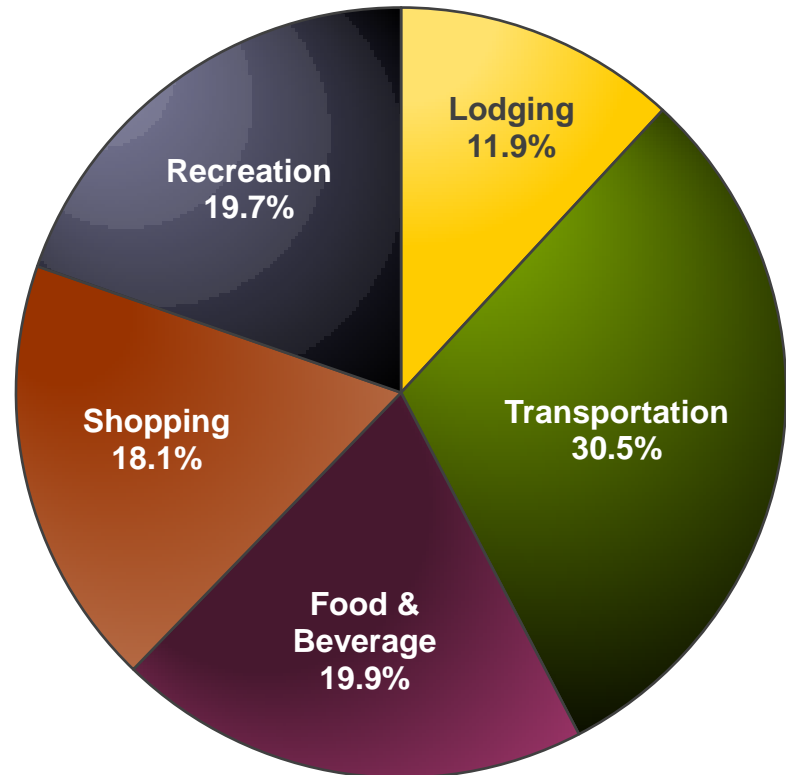
# Upstate PA – 2013 & 2014 Travel Economy impacts

Total Tourism Economy Impacts					
(Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2014					
Bradford	240.0	2,220	72.0	19.6	18.4
Lackawanna	669.6	8,054	254.3	61.2	59.0
Luzerne	923.8	11,145	448.3	93.6	98.3
Schuylkill	209.7	2,402	98.9	18.8	18.9
Sullivan	19.6	258	7.2	1.7	1.7
Susquehanna	170.3	1,736	51.0	13.7	12.9
Wyoming	67.0	702	24.0	5.8	5.5
UPSTATE PA	2,300.1	26,516.3	955.6	214.3	214.8
Percent Change	0.1%	1.8%	7.8%	3.0%	6.6%
2013					
Bradford	235.5	2,211	71.0	19.4	18.0
Lackawanna	686.1	7,993	254.6	62.8	59.5
Luzerne	908.2	10,772	384.4	86.1	85.8
Schuylkill	207.0	2,396	95.7	18.4	18.2
Sullivan	20.2	258	7.2	1.8	1.7
Susquehanna	172.0	1,730	50.8	13.9	12.9
Wyoming	67.8	700	23.2	5.8	5.4
UPSTATE PA	2,296.8	26,060.0	886.7	208.2	201.5

# Pocono Mountains

- The Pocono Mountains region is comprised of the following counties: Carbon, Monroe, Pike, and Wayne.
- Travelers spent nearly \$3.0 billion in the Pocono Mountains region in 2014 – the fourth highest amount among the state's 11 tourism regions and up 0.2% from 2013.
- The Pocono Mountains region had the highest proportion of traveler dollars spent on shopping and the fourth highest on recreation among the state's 11 tourism regions in 2014.

**Pocono Mountains Region  
2014 Spending by Category**

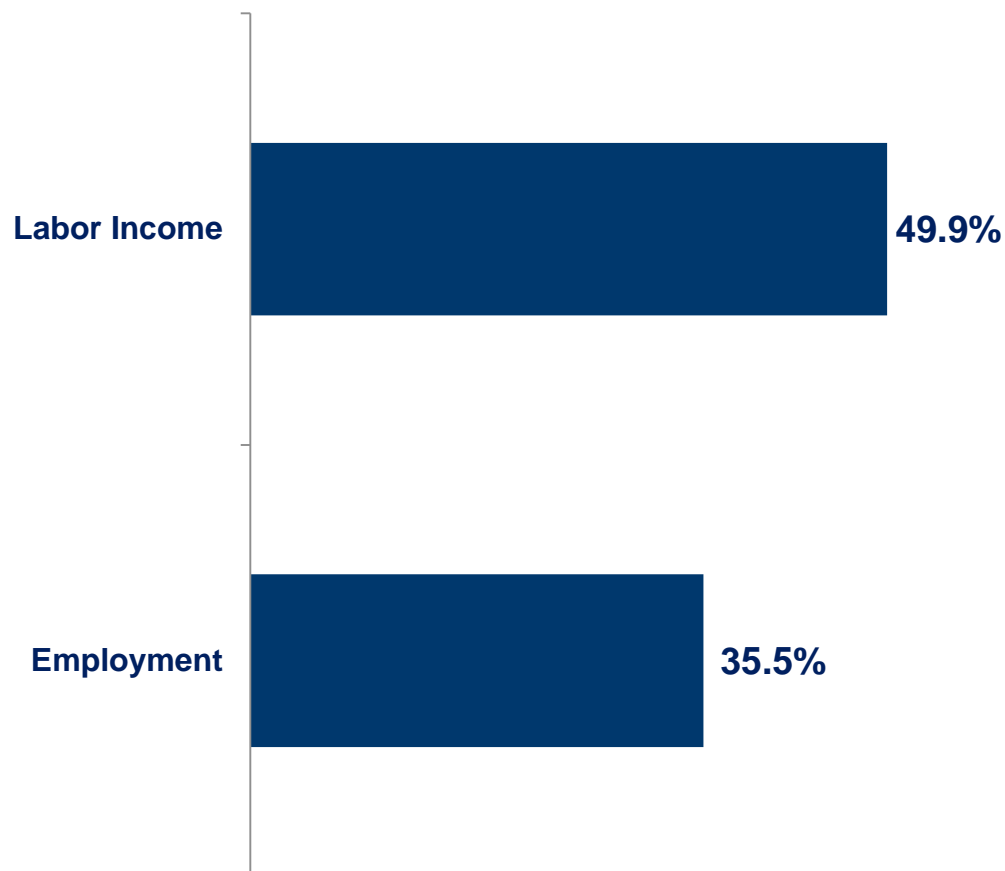


Source: Tourism Economics

# Pocono Mountains

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- The region's share of travel-supported labor income increased to 49.9% in 2014, while the employment share was 35.5%.
- As in prior years, the Pocono Mountains region continued to have, by far, the highest proportion of labor income and employment supported by travel of the state's 11 tourism regions.

**Travel Industry Share of Regional Economy**





# Pocono Mountains – Traveler spending & employment timelines

## Tourism Industry Spending

(Millions of dollars)

County	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Carbon	299.4	288.8	303.3	320.2	294.5	314.7	332.6	343.7	345.4	344.9
Monroe	1,371.4	1,370.7	1,472.5	1,665.3	1,372.6	1,502.1	1,552.5	1,607.5	1,596.5	1,606.3
Pike	545.4	543.5	559.6	616.5	520.7	538.0	550.9	575.1	606.0	607.1
Wayne	371.4	382.6	409.3	437.6	400.4	422.4	429.5	429.5	424.2	419.7
Pocono Mountains	2,587.5	2,585.6	2,744.7	3,039.6	2,588.2	2,777.2	2,865.4	2,955.9	2,972.1	2,978.0
Percent Change		-0.1%	6.2%	10.7%	-14.9%	7.3%	3.2%	3.2%	0.5%	0.2%

## Tourism Industry Employment Impacts

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

# Pocono Mountains – Traveler spending by category

<b>Tourism Direct Sales</b> (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
<b>2014</b>						
Carbon	36.4	67.4	51.4	69.1	120.6	344.9
Monroe	204.4	306.7	317.2	337.9	440.1	1,606.3
Pike	71.5	128.7	99.4	102.4	205.0	607.1
Wayne	43.7	89.7	69.5	74.2	142.6	419.7
<b>Pocono Mountains</b>	<b>356.1</b>	<b>592.5</b>	<b>537.5</b>	<b>583.6</b>	<b>908.3</b>	<b>2,978.0</b>
<b>Percent Change</b>	<b>4.2%</b>	<b>2.5%</b>	<b>1.3%</b>	<b>-1.1%</b>	<b>-2.5%</b>	<b>0.2%</b>
<b>2013</b>						
Carbon	36.1	67.8	51.0	68.7	121.8	345.4
Monroe	192.7	297.0	310.5	343.3	453.1	1,596.5
Pike	68.9	124.8	99.1	103.1	210.2	606.0
Wayne	44.0	88.6	69.8	75.1	146.7	424.2
<b>Pocono Mountains</b>	<b>341.6</b>	<b>578.1</b>	<b>530.4</b>	<b>590.1</b>	<b>931.8</b>	<b>2,972.1</b>

# Pocono Mountains – 2013 & 2014 TSA spending

<b>Tourism Satellite Account Categories</b> (Millions of dollars)				
County	Visitor Spending	Government	Investment & Non-visitor PCE	Total Tourism Demand
<b>2014</b>				
Carbon	344.9	0.6	18.0	363.5
Monroe	1,606.3	4.0	83.8	1,694.1
Pike	607.1	1.2	31.7	640.0
Wayne	419.7	0.6	21.9	442.2
<b>Pocono Mountains</b>	<b>2,978.0</b>	<b>6.4</b>	<b>155.4</b>	<b>3,139.8</b>
<b>Percent Change</b>	<b>0.2%</b>	<b>2.8%</b>	<b>-1.3%</b>	<b>0.1%</b>
<b>2013</b>				
Carbon	345.4	0.6	18.3	364.2
Monroe	1,596.5	3.9	84.5	1,684.8
Pike	606.0	1.2	32.1	639.3
Wayne	424.2	0.6	22.5	447.3
<b>Pocono Mountains</b>	<b>2,972.1</b>	<b>6.3</b>	<b>157.4</b>	<b>3,135.7</b>

# Pocono Mountains – 2013 & 2014 Travel Industry impacts

Tourism Industry Impacts					
(Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2014					
Carbon	344.9	2,722	62.8	17.7	15.3
Monroe	1,606.3	12,890	400.8	94.2	86.0
Pike	607.1	4,922	159.5	36.1	33.6
Wayne	419.7	3,049	93.9	23.1	21.0
Pocono Mountains	2,978.0	23,582.2	717.0	171.1	155.9
Percent Change	0.2%	0.0%	1.8%	-0.5%	1.0%
2013					
Carbon	345.4	2,693	62.5	17.9	15.2
Monroe	1,596.5	12,912	394.8	94.5	85.2
Pike	606.0	4,853	152.0	35.8	32.6
Wayne	424.2	3,120	95.0	23.7	21.3
Pocono Mountains	2,972.1	23,578.8	704.4	171.9	154.4

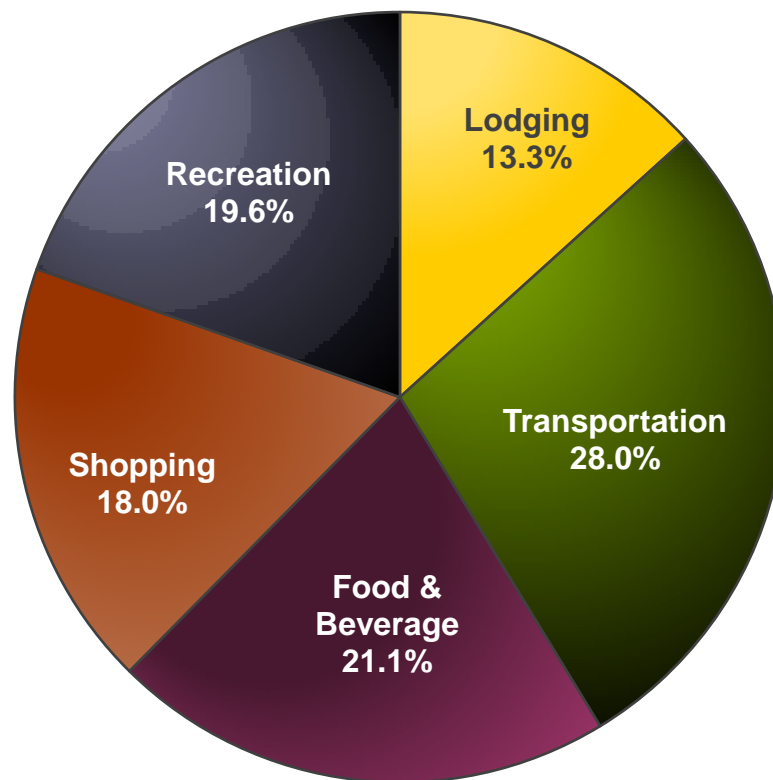
# Pocono Mountains – 2013 & 2014 Travel Economy impacts

Total Tourism Economy Impacts					
(Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2014					
Carbon	363.5	4,006	119.7	31.2	30.7
Monroe	1,694.1	18,424	697.8	165.8	173.4
Pike	640.0	6,948	272.3	63.8	67.8
Wayne	442.2	4,493	169.7	41.0	42.3
Pocono Mountains	3,139.8	33,871.3	1,259.6	301.8	314.2
Percent Change	0.1%	-0.1%	1.3%	-0.6%	1.0%
2013					
Carbon	364.2	3,973	119.5	31.6	30.7
Monroe	1,684.8	18,468	690.4	166.7	171.9
Pike	639.3	6,867	261.6	63.3	65.8
Wayne	447.3	4,586	171.8	42.1	42.9
Pocono Mountains	3,135.7	33,893.2	1,243.3	303.7	311.2

# Dutch Country Roads

- The Dutch Country Roads region is comprised of the following counties: Adams, Berks, Cumberland, Dauphin, Franklin, Lancaster, Lebanon, Perry, and York.
- Travelers spent close to \$8.0 billion in the Dutch Country Roads region in 2014 – the second highest level among PA’s 11 tourism regions, a new record high, and a 1.5% increase from 2013.
- The Dutch Country Roads region had the second highest proportion of traveler dollars spent on shopping and the 2<sup>nd</sup> lowest share on transportation, while ranking third in the percentage of traveler dollars allocated to both lodging and recreation of the state’s 11 tourism regions in 2014.

## Dutch Country Roads Region 2014 Spending by Category

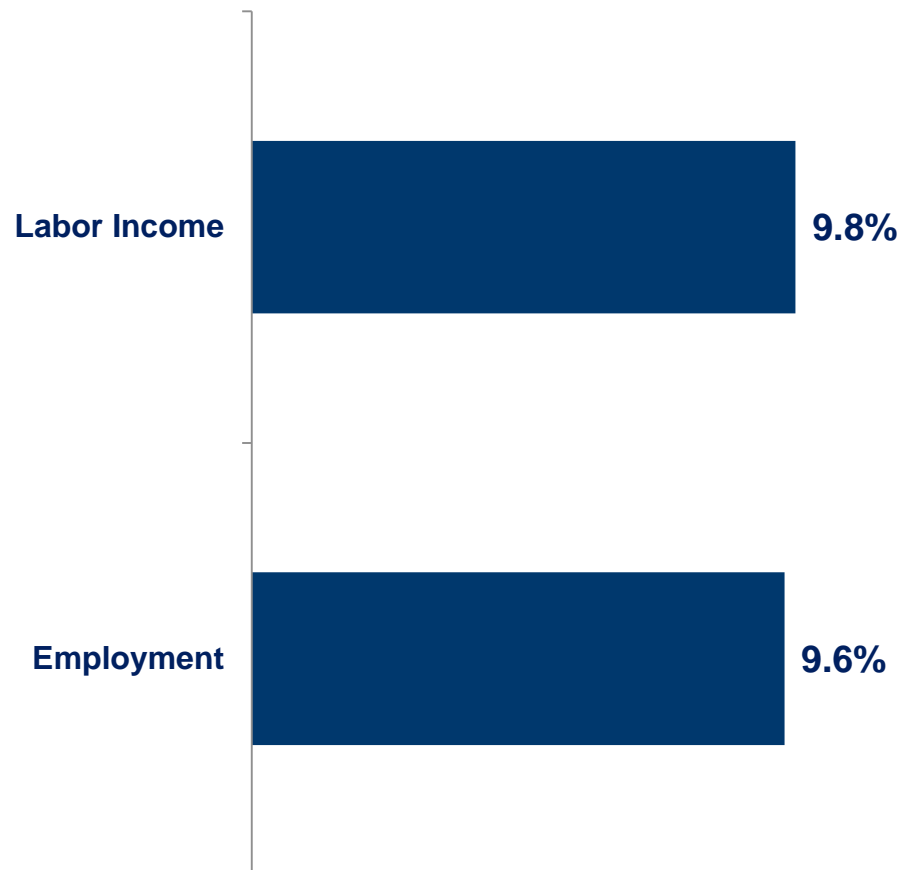


Source: Tourism Economics

# Dutch Country Roads

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- The travel-supported labor income share for the Dutch Country Roads region rose to 9.8% -- the 5<sup>th</sup> highest of PA's 11 tourism regions, while the employment share was slightly lower at 9.6% in 2014.
- The region continued to have the second highest number of jobs supported by the travel industry among the state's 11 tourism regions and to rank 4<sup>th</sup> in terms of the industry's share of the region's employment in 2014.

**Travel Industry Share of Regional Economy**



# Dutch Country Roads – Traveler spending & employment timelines

## Tourism Industry Spending

(Millions of dollars)

County	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Adams	479.1	502.2	535.1	602.8	520.9	555.8	608.7	628.8	671.8	666.0
Berks	643.8	650.6	668.1	746.9	623.7	687.7	763.0	794.8	807.3	795.9
Cumberland	634.4	657.6	674.9	774.2	628.3	677.8	727.0	749.8	760.3	774.1
Dauphin	1,704.3	1,801.6	1,867.7	2,142.4	1,878.7	2,013.3	2,135.6	2,213.7	2,286.3	2,315.3
Franklin	248.3	259.6	280.8	322.2	270.2	286.5	298.1	314.8	323.4	324.2
Lancaster	1,436.6	1,464.4	1,498.0	1,706.5	1,523.1	1,669.7	1,793.2	1,817.5	1,854.9	1,920.2
Lebanon	152.4	154.8	158.9	182.2	159.9	170.9	185.7	192.6	193.9	200.9
Perry	43.0	42.9	44.2	48.6	40.6	43.6	47.9	46.8	46.9	47.4
York	720.2	741.2	764.3	829.2	706.5	753.5	850.5	885.1	907.5	923.1
Dutch Country Roads	6,062.2	6,274.7	6,491.9	7,355.2	6,351.8	6,858.9	7,409.8	7,643.8	7,852.4	7,967.1
Percent Change		3.5%	3.5%	13.3%	-13.6%	8.0%	8.0%	3.2%	2.7%	1.5%

## Tourism Industry Employment Impacts

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



# Dutch Country Roads – Traveler spending by category

Tourism Direct Sales						
(Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2014						
Adams	87.8	133.7	125.3	153.5	165.7	666.0
Berks	79.3	177.6	152.4	136.7	250.0	795.9
Cumberland	108.7	179.9	138.6	126.3	220.7	774.1
Dauphin	363.8	432.6	355.7	544.1	619.1	2,315.3
Franklin	34.7	71.3	55.8	57.2	105.4	324.2
Lancaster	265.8	408.1	385.6	354.9	505.8	1,920.2
Lebanon	17.2	48.4	41.1	34.1	60.2	200.9
Perry	2.0	11.2	8.8	7.1	18.2	47.4
York	102.1	209.3	170.5	157.4	283.7	923.1
Dutch Country Roads	1,061.4	1,672.0	1,433.7	1,571.2	2,228.8	7,967.1
Percent Change	6.1%	3.5%	2.2%	1.2%	-2.3%	1.5%
2013						
Adams	87.3	132.3	124.3	154.9	173.1	671.8
Berks	78.9	175.1	154.8	138.9	259.8	807.3
Cumberland	101.5	173.1	136.3	123.4	226.1	760.3
Dauphin	341.9	417.6	346.5	541.6	638.7	2,286.3
Franklin	32.8	69.1	54.1	57.0	110.3	323.4
Lancaster	246.1	389.8	372.5	343.5	503.0	1,854.9
Lebanon	14.6	45.6	39.3	32.5	61.9	193.9
Perry	1.9	10.8	8.4	6.9	18.9	46.9
York	95.7	201.7	167.1	153.8	289.2	907.5
Dutch Country Roads	1,000.6	1,615.1	1,403.3	1,552.4	2,281.0	7,852.4

# Dutch Country Roads – 2013 & 2014 TSA spending

<b>Tourism Satellite Account Categories</b> (Millions of dollars)				
County	Visitor Spending	Government	Investment & Non-visitor PCE	Total Tourism Demand
2014				
Adams	666.0	1.5	34.7	702.2
Berks	795.9	2.1	41.5	839.5
Cumberland	774.1	2.1	40.4	816.6
Dauphin	2,315.3	11.8	120.8	2,447.9
Franklin	324.2	0.8	16.9	341.9
Lancaster	1,920.2	8.2	100.2	2,028.6
Lebanon	200.9	0.4	10.5	211.8
Perry	47.4	0.0	2.5	49.9
York	923.1	2.1	48.2	973.4
Dutch Country Roads	7,967.1	29.0	415.6	8,411.7
Percent Change	1.5%	1.0%	0.0%	1.4%
2013				
Adams	671.8	2.8	35.6	710.2
Berks	807.3	2.2	42.7	852.3
Cumberland	760.3	2.0	40.3	802.6
Dauphin	2,286.3	10.9	121.1	2,418.2
Franklin	323.4	0.7	17.1	341.3
Lancaster	1,854.9	7.6	98.2	1,960.8
Lebanon	193.9	0.3	10.3	204.6
Perry	46.9	0.0	2.5	49.4
York	907.5	2.1	48.0	957.6
Dutch Country Roads	7,852.4	28.7	415.8	8,296.8

# Dutch Country Roads – 2013 & 2014 Travel Industry impacts

Tourism Industry Impacts					
(Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2014					
Adams	666.0	5,074	142.1	36.5	32.3
Berks	795.9	6,564	186.5	45.6	41.0
Cumberland	774.1	6,215	164.1	42.7	37.5
Dauphin	2,315.3	18,709	607.0	144.6	128.0
Franklin	324.2	2,438	65.2	17.5	15.2
Lancaster	1,920.2	15,731	403.1	108.6	92.4
Lebanon	200.9	1,667	51.7	11.8	11.0
Perry	47.4	328	7.6	2.3	2.0
York	923.1	7,637	209.2	51.9	46.5
Dutch Country Roads	7,967.1	64,363	1,836.5	461.5	405.8
Percent Change	1.5%	0.6%	3.6%	1.0%	2.7%
2013					
Adams	671.8	5,080	139.0	38.2	32.0
Berks	807.3	6,577	179.1	45.9	40.2
Cumberland	760.3	6,152	157.9	42.1	36.3
Dauphin	2,286.3	18,724	589.3	142.9	125.2
Franklin	323.4	2,438	64.1	17.5	15.0
Lancaster	1,854.9	15,478	384.8	105.4	88.6
Lebanon	193.9	1,654	50.5	11.6	10.7
Perry	46.9	327	7.4	2.3	1.9
York	907.5	7,525	200.8	51.1	45.1
Dutch Country Roads	7,852.4	63,955	1,773.0	457.0	395.0

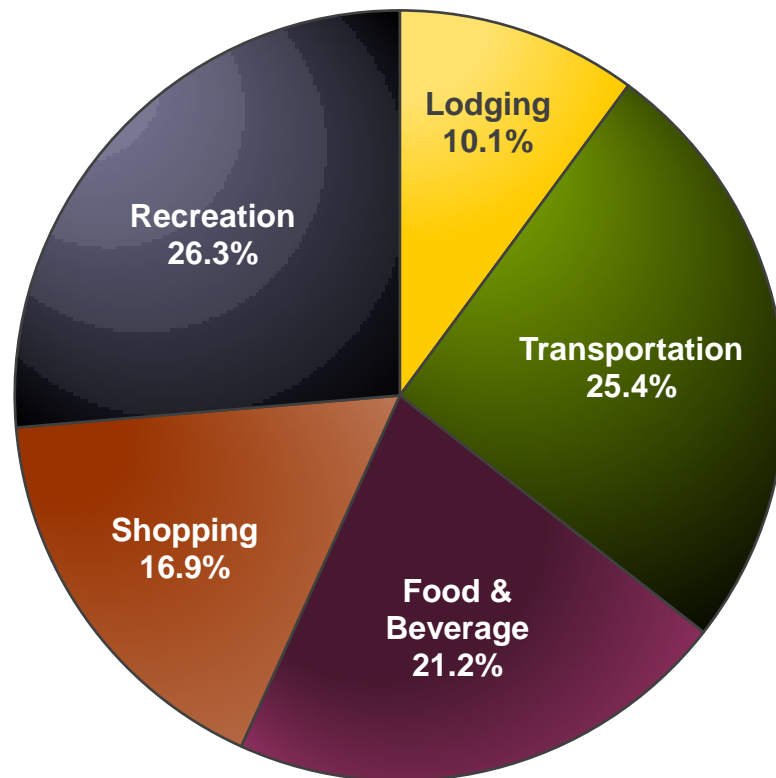
# Dutch Country Roads – 2013 & 2014 Travel Economy impacts

Total Tourism Economy Impacts					
(Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2014					
Adams	702.2	7,587	272.1	64.3	65.2
Berks	839.5	10,823	393.1	80.1	82.5
Cumberland	816.6	9,515	320.7	74.9	75.4
Dauphin	2,447.9	26,238	1,028.4	250.2	258.2
Franklin	341.9	4,033	140.4	30.7	30.6
Lancaster	2,028.6	23,659	774.6	188.2	186.1
Lebanon	211.8	2,907	113.5	20.9	22.1
Perry	49.9	692	23.9	4.1	3.9
York	973.4	12,368	435.7	91.4	93.8
Dutch Country Roads	8,411.7	97,821	3,502.3	804.8	817.8
Percent Change	1.4%	0.5%	2.7%	0.9%	2.7%
2013					
Adams	710.2	7,600	265.7	66.3	64.5
Berks	852.3	10,846	382.7	80.7	81.0
Cumberland	802.6	9,442	312.1	73.9	73.2
Dauphin	2,418.2	26,278	1,004.1	248.0	252.4
Franklin	341.3	4,036	139.1	30.8	30.3
Lancaster	1,960.8	23,356	748.6	183.0	178.5
Lebanon	204.6	2,892	111.8	20.5	21.5
Perry	49.4	691	23.5	4.0	3.8
York	957.6	12,235	423.8	90.1	90.8
Dutch Country Roads	8,296.8	97,376	3,411.3	797.4	796.0

# Lehigh Valley

- The Lehigh Valley region is comprised the following counties: Lehigh and Northampton.
- Travelers spent close to \$2.0 billion in the Lehigh Valley region in 2014 – a new record high and a 3.7% increase from 2013, which was the largest percentage increase of the state's 11 tourism regions and the fourth largest increase in dollar terms.
- With its proximity to the NY and NJ markets, a strong day-trip market, and regional attractions, the Lehigh Valley region continued to have the highest proportion of traveler spending on recreation among PA's tourism regions and the lowest share spent on transportation in 2014.

## Lehigh Valley Region 2014 Spending by Category

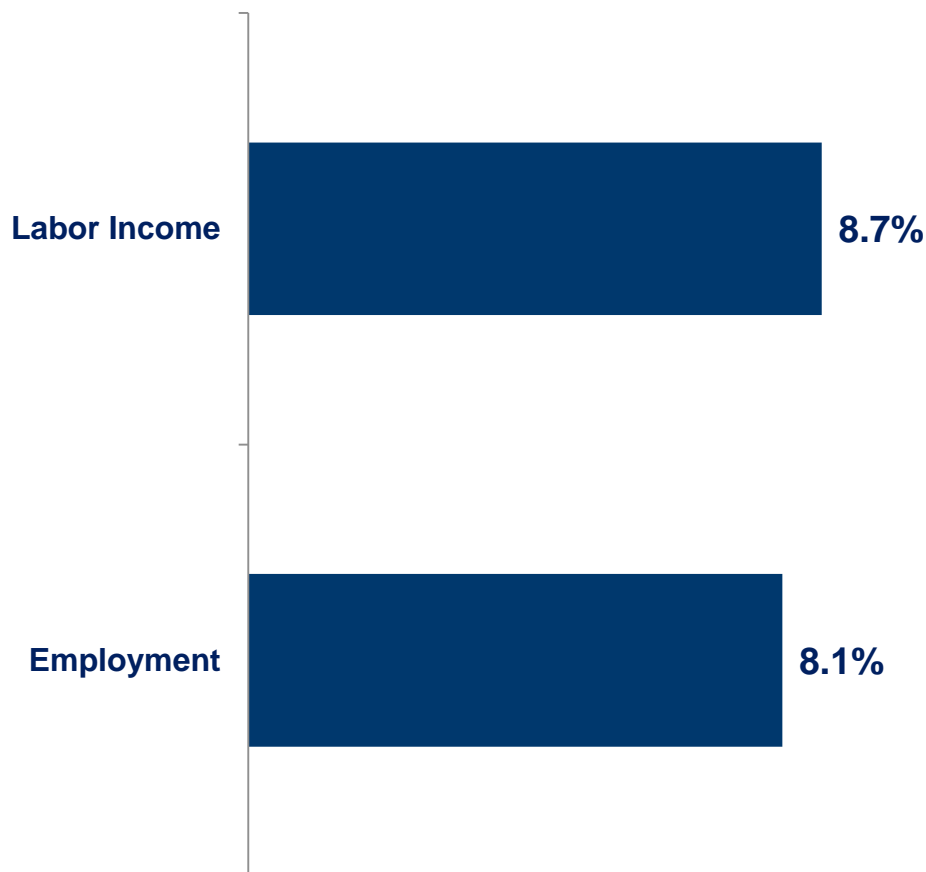


Source: Tourism Economics

# Lehigh Valley

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- The travel industry was responsible for 8.7% of the region's labor income in 2014 - up 0.3 percentage points from 2013, while the industry's share of regional employment fell slightly to 8.1% in 2014.
- The region ranked 7<sup>th</sup> in the actual number of travel-supported jobs among the state's 11 tourism regions in 2014 and 9<sup>th</sup> in terms of the industry's share of regional employment.

## Travel Industry Share of Regional Economy



# Lehigh Valley – Traveler spending & employment timelines

Tourism Industry Spending										
(Millions of dollars)										
County	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Lehigh	867.2	891.2	952.9	1,061.4	872.1	925.4	996.5	1,030.7	1,041.7	1,054.7
Northampton	472.5	494.2	517.7	581.2	518.3	596.1	761.7	827.0	863.9	922.0
Lehigh Valley	1,339.7	1,385.4	1,470.6	1,642.6	1,390.4	1,521.4	1,758.2	1,857.7	1,905.6	1,976.7
Percent Change		3.4%	6.2%	11.7%	-15.4%	9.4%	15.6%	5.7%	2.6%	3.7%
Tourism Industry Employment Impacts										
County	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Lehigh	8,079	8,160	8,242	8,274	7,732	7,555	7,624	7,838	7,970	7,983
Northampton	4,963	4,938	5,111	5,208	5,074	5,448	5,816	6,180	6,789	6,920
Lehigh Valley	13,042	13,098	13,353	13,482	12,806	13,003	13,440	14,018	14,760	14,903.0
Percent Change		0.4%	1.9%	1.0%	-5.0%	1.5%	3.4%	4.3%	5.3%	1.0%

# Lehigh Valley – 2013 & 2014 Traveler spending by category

<b>Tourism Direct Sales</b>						
<b>(Millions of dollars)</b>						
<b>County</b>	<b>Lodging</b>	<b>Food &amp; beverage</b>	<b>Retail</b>	<b>Recreation</b>	<b>Transport</b>	<b>Total</b>
<b>2014</b>						
Lehigh	107.3	252.9	210.2	207.0	277.3	1,054.7
Northampton	94.7	166.8	124.3	311.9	224.2	922.0
Lehigh Valley	202.0	419.7	334.5	518.9	501.5	1,976.7
Percent Change	11.4%	5.7%	4.1%	5.3%	-2.3%	3.7%
<b>2013</b>						
Lehigh	100.1	242.9	206.0	203.0	289.6	1,041.7
Northampton	81.2	154.0	115.3	290.0	223.5	863.9
Lehigh Valley	181.3	396.9	321.3	493.0	513.1	1,905.6



# Lehigh Valley – 2013 & 2014 TSA spending

<b>Tourism Satellite Account Categories</b>				
<b>(Millions of dollars)</b>				
<b>County</b>	<b>Visitor Spending</b>	<b>Government</b>	<b>Investment &amp; Non-visitor PCE</b>	<b>Total Tourism Demand</b>
<b>2014</b>				
<b>Lehigh</b>	<b>1,054.7</b>	<b>3.0</b>	<b>55.0</b>	<b>1,112.7</b>
<b>Northampton</b>	<b>922.0</b>	<b>2.7</b>	<b>48.1</b>	<b>972.7</b>
<b>Lehigh Valley</b>	<b>1,976.7</b>	<b>5.6</b>	<b>103.1</b>	<b>2,085.4</b>
<b>Percent Change</b>	<b>3.7%</b>	<b>5.9%</b>	<b>2.2%</b>	<b>3.7%</b>
<b>2013</b>				
<b>Lehigh</b>	<b>1,041.7</b>	<b>2.8</b>	<b>55.2</b>	<b>1,099.7</b>
<b>Northampton</b>	<b>863.9</b>	<b>2.5</b>	<b>45.7</b>	<b>912.2</b>
<b>Lehigh Valley</b>	<b>1,905.6</b>	<b>5.3</b>	<b>100.9</b>	<b>2,011.8</b>

# Lehigh Valley – 2013 & 2014 Travel Industry impacts

Tourism Industry Impacts					
(Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2014					
Lehigh	1,054.7	7,983	227.1	58.7	51.5
Northampton	922.0	6,920	299.6	61.2	58.9
Lehigh Valley	1,976.7	14,903.0	526.7	119.9	110.4
Percent Change	3.7%	1.0%	4.5%	7.5%	11.7%
2013					
Lehigh	1,041.7	7,970	218.3	58.0	50.0
Northampton	863.9	6,789	285.7	53.5	48.8
Lehigh Valley	1,905.6	14,759.6	504.0	111.5	98.9

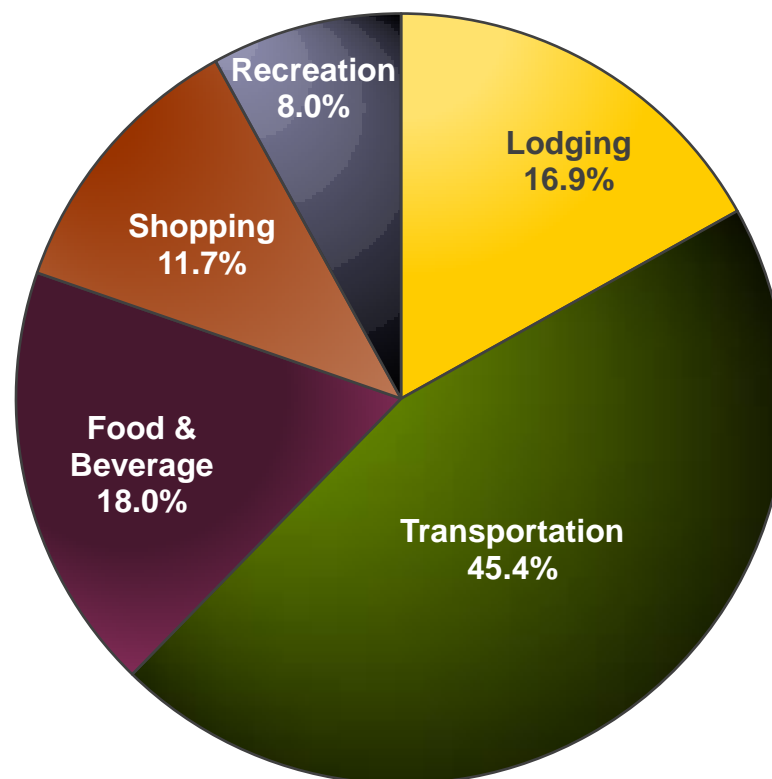
# Lehigh Valley – 2013 & 2014 Travel Economy impacts

Total Tourism Economy Impacts					
(Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2014					
Lehigh	1,112.7	12,510	449.4	102.8	103.8
Northampton	972.7	10,732	539.1	107.9	119.0
Lehigh Valley	2,085.4	23,242.3	988.6	210.7	222.8
Percent Change	3.7%	0.7%	3.4%	7.5%	11.8%
2013					
Lehigh	1,099.7	12,503	437.1	101.7	100.8
Northampton	912.2	10,574	519.2	94.2	98.5
Lehigh Valley	2,011.8	23,077.4	956.3	195.9	199.3

# Philadelphia & The Countryside

- Philadelphia and The Countryside region is comprised of the following counties: Bucks, Chester, Delaware, Montgomery, and Philadelphia.
- Travelers spent more than \$9.1 billion in the Philadelphia & The Countryside region in 2014 – a new record high and a 1.9% increase from 2013.
- As in prior years, the region continued to have the highest proportion of traveler spending on transportation and lodging and the lowest proportions on recreation, food & beverages, and shopping of the state's 11 tourism regions in 2014.

## Philadelphia & The Countryside Region 2014 Spending by Category

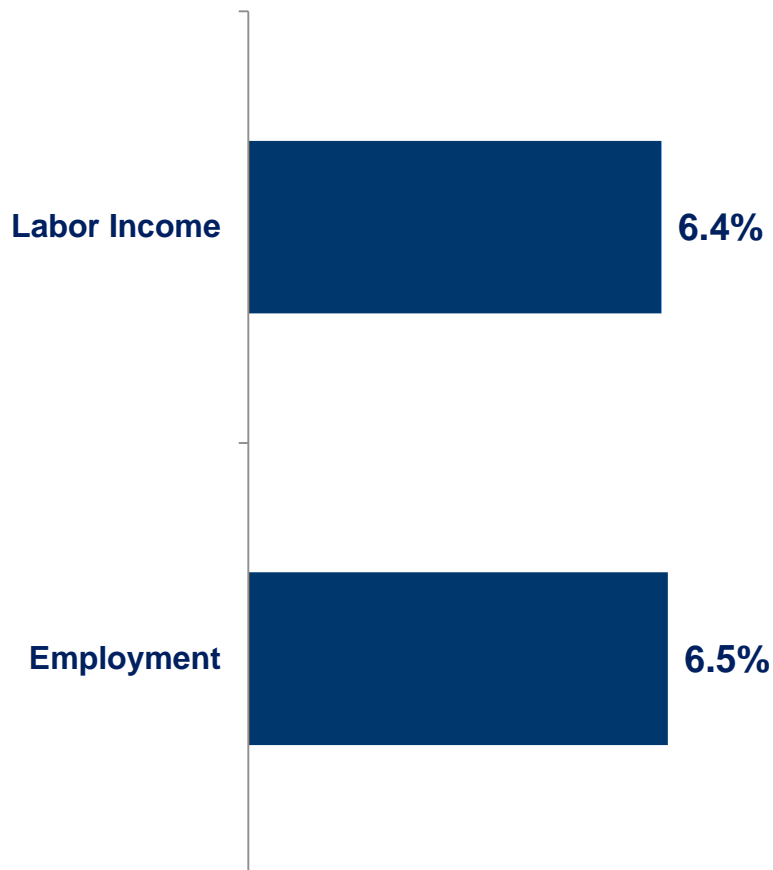


Source: Tourism Economics

# Philadelphia and The Countryside

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total economy.
- The travel-supported labor income share for the Philadelphia and The Countryside region was 6.4% in 2013 – a 0.3 percentage point increase from 2013, while the industry's share of the region's employment base was down slightly to 6.5%.
- The region continued to have the highest number of jobs supported by the travel industry among the state's tourism regions in 2014, but the industry's contributions to labor income and employment were the smallest of the state's tourism regions due to the size and great diversity of the regional economy.

**Travel Industry Share of Regional Economy**



# Philadelphia & The Countryside – Traveler spending & employment timelines

## Tourism Industry Spending

(Millions of dollars)

County	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Bucks	582.1	602.8	640.3	704.5	629.2	673.2	728.1	743.6	742.1	760.4
Chester	543.8	557.7	595.5	680.1	608.2	646.7	684.2	713.8	730.4	736.2
Delaware	498.1	510.7	558.2	613.9	530.4	564.5	654.6	645.8	642.1	655.6
Montgomery	985.2	1,014.0	1,079.3	1,176.2	1,014.2	1,070.8	1,180.4	1,221.8	1,244.9	1,272.5
Philadelphia	4,401.4	4,673.9	4,879.8	5,334.7	4,736.2	5,044.0	5,291.3	5,389.9	5,590.6	5,698.5
Philadelphia & The Countryside	7,010.6	7,359.0	7,753.2	8,509.5	7,518.1	7,999.1	8,538.6	8,714.9	8,950.1	9,123.1
Percent Change		5.0%	5.4%	9.8%	-11.7%	6.4%	6.7%	2.1%	2.7%	1.9%

## Tourism Industry Employment Impacts

County	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Bucks	8,054	8,280	8,545	8,795	8,482	8,389	8,568	8,717	8,776	8,850
Chester	6,790	6,944	7,172	7,286	6,983	6,823	6,879	7,052	7,176	7,288
Delaware	6,998	6,965	6,931	6,936	6,701	6,697	6,936	7,158	7,360	7,486
Montgomery	12,599	12,822	12,909	12,983	12,380	12,159	12,337	13,008	13,366	13,430
Philadelphia	31,855	32,640	33,719	33,755	31,929	32,221	32,669	33,628	34,415	34,803
Philadelphia & The Countryside	66,295	67,651	69,275	69,755	66,474	66,289	67,390	69,563	71,093	71,857.4
Percent Change		2.0%	2.4%	0.7%	-4.7%	-0.3%	1.7%	3.2%	2.2%	1.1%

# Philadelphia & The Countryside – Traveler spending by category

<b>Tourism Direct Sales</b>						
<b>(Millions of dollars)</b>						
<b>County</b>	<b>Lodging</b>	<b>Food &amp; beverage</b>	<b>Retail</b>	<b>Recreation</b>	<b>Transport</b>	<b>Total</b>
<b>2014</b>						
<b>Bucks</b>	130.6	168.1	115.5	78.5	267.7	760.4
<b>Chester</b>	134.4	163.0	113.4	76.3	249.1	736.2
<b>Delaware</b>	97.6	145.6	94.8	73.9	243.8	655.6
<b>Montgomery</b>	315.0	245.2	159.6	90.7	462.0	1,272.5
<b>Philadelphia</b>	868.4	922.9	583.0	406.5	2,917.7	5,698.5
<b>Philadelphia &amp; The Countryside</b>	<b>1,546.0</b>	<b>1,644.8</b>	<b>1,066.2</b>	<b>725.8</b>	<b>4,140.3</b>	<b>9,123.1</b>
<b>Percent Change</b>	<b>6.0%</b>	<b>6.0%</b>	<b>5.2%</b>	<b>3.2%</b>	<b>-1.9%</b>	<b>1.9%</b>
<b>2013</b>						
<b>Bucks</b>	122.0	160.1	111.2	75.1	273.6	742.1
<b>Chester</b>	127.3	154.2	105.9	74.5	268.5	730.4
<b>Delaware</b>	89.9	137.4	89.5	70.6	254.7	642.1
<b>Montgomery</b>	301.4	232.8	150.3	87.7	472.8	1,244.9
<b>Philadelphia</b>	818.4	867.9	556.5	395.1	2,952.8	5,590.6
<b>Philadelphia &amp; The Countryside</b>	<b>1,459.0</b>	<b>1,552.3</b>	<b>1,013.3</b>	<b>703.1</b>	<b>4,222.4</b>	<b>8,950.1</b>

# Philadelphia & The Countryside – 2013 & 2014 TSA spending

<b>Tourism Satellite Account Categories</b> (Millions of dollars)				
County	Visitor Spending	Government	Investment & Non-visitor PCE	Total Tourism Demand
<b>2014</b>				
Bucks	760.4	3.0	39.7	803.1
Chester	736.2	3.1	38.4	777.7
Delaware	655.6	2.5	34.2	692.3
Montgomery	1,272.5	4.4	66.4	1,343.3
Philadelphia	5,698.5	58.4	297.3	6,054.2
Philadelphia & The Countryside	9,123.1	71.4	476.0	9,670.5
Percent Change	1.9%	6.4%	0.4%	1.9%
<b>2013</b>				
Bucks	742.1	3.0	39.3	784.3
Chester	730.4	2.9	38.7	772.0
Delaware	642.1	2.3	34.0	678.4
Montgomery	1,244.9	4.5	65.9	1,315.4
Philadelphia	5,590.6	54.4	296.0	5,941.0
Philadelphia & The Countryside	8,950.1	67.1	473.9	9,491.1



# Philadelphia & The Countryside – 2013 & 2014 Travel Industry impacts

Tourism Industry Impacts					
(Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2014					
Bucks	760.4	8,850	257.0	52.2	50.0
Chester	736.2	7,288	244.0	50.2	47.7
Delaware	655.6	7,486	270.1	49.7	49.7
Montgomery	1,272.5	13,430	483.3	91.9	90.9
Philadelphia	5,698.5	34,803	1,779.5	413.0	354.3
Philadelphia & The Countryside	9,123.1	71,857.4	3,033.9	657.0	592.6
Percent Change	1.9%	1.1%	4.8%	2.2%	3.7%
2013					
Bucks	742.1	8,776	248.7	51.6	48.6
Chester	730.4	7,176	233.8	49.7	46.3
Delaware	642.1	7,360	254.8	48.3	47.5
Montgomery	1,244.9	13,366	472.1	91.7	89.2
Philadelphia	5,590.6	34,415	1,684.5	401.7	339.8
Philadelphia & The Countryside	8,950.1	71,092.5	2,894.0	643.0	571.4

# Philadelphia & The Countryside – 2013 & 2014 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
2014					
Bucks	803.1	15,397	574.1	91.5	100.9
Chester	777.7	12,471	512.2	87.9	96.4
Delaware	692.3	13,083	567.5	87.4	100.6
Montgomery	1,343.3	22,665	980.5	161.9	183.8
Philadelphia	6,054.2	55,262	3,178.6	695.7	715.4
Philadelphia & The Countryside	9,670.5	118,877.8	5,813.0	1,124.4	1,197.0
Percent Change	1.9%	0.8%	3.6%	1.9%	3.7%
2013					
Bucks	784.3	15,313	562.6	90.5	98.1
Chester	772.0	12,338	497.8	87.0	93.5
Delaware	678.4	12,931	545.5	85.2	96.0
Montgomery	1,315.4	22,599	965.4	161.5	180.4
Philadelphia	5,941.0	54,809	3,042.2	679.1	686.0
Philadelphia & The Countryside	9,491.1	117,990.2	5,613.5	1,103.4	1,154.0

# Methodology and Background



TOURISM  
ECONOMICS

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# Methods and data sources

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

# Methods and data sources

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

# Selected recent economic impact clients

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## Associations / Companies

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

DMAI (Event Impact  
Calculator for 80 CVBs)

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

InterContinental Hotels

## States

California

Georgia

Maryland

New York

North Carolina

Ohio

Pennsylvania

Wisconsin

## Cities

Baltimore, MD

Columbus, OH

Kansas City, MO

London, United Kingdom

New York City

Omaha, NE

Orlando, FL

Philadelphia, PA

Pittsburgh, PA

Rockford, IL

## Countries / Provinces

Bahamas

Bermuda

Cayman Islands

Dubai

Ontario Canada

St. Lucia

United Kingdom



# About Tourism Economics

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



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For more information:

Adam Sacks, Managing Director

[adam@tourismeconomics.com](mailto:adam@tourismeconomics.com)

Christopher Pike, Senior Economist

[cpike@tourismeconomics.com](mailto:cpike@tourismeconomics.com)