The Economic Impact of Travel in Pennsylvania

Tourism Satellite Account
Calendar Year 2013

January 2015

TOURISM ECONOMICS
AN OXFORD ECONOMICS COMPANY

Table of Contents

State Overview

TOURISM ECONOMICS

AN OXFORD ECONOMICS COMPANY

Recent trends

- The Pennsylvania travel and tourism economy expanded for the fourth straight year in 2013, with travel & tourism industry sales (i.e., traveler spending) rising 2.0% to $39.2 billion from $38.5 billion in 2012. *(Note: The total for 2012 was revised slightly upward from $38.4 billion in the 2012 report.)*
  - The number of travelers visiting Pennsylvania posted a slight increase to 192.9 million domestic and international travelers combined in 2013, with growth once again largely concentrated in the day-trip segment.
  - Overnight visitation grew modestly with hotel room nights up 0.1% compared to 2012.
  - Per trip spending increased slightly – a combination of higher prices in several key sectors along with improving consumer confidence shown by travelers' willingness to open their wallets a bit more.
- Traveler spending generated an estimated $68.4 billion in total economic activity throughout all industries in Pennsylvania in 2013.

Key results

- Travel and tourism-related economic activity supported 478,888 jobs in total (direct and indirect jobs) in PA in 2013, representing 6.5% of total employment.
- Employment growth in PA's travel and tourism industry was nearly three times PA's overall employment growth rate for 2013.
- The state's travel and tourism sector was directly responsible for an estimated $15.3 billion of the state's 2013 Gross Domestic Product (GDP) – a 4.4% increase from 2012.
- Including indirect and induced impacts, PA's travel and tourism industry generated $4.13 billion in state and local taxes and $4.16 billion in Federal taxes in 2013.

On average, the spending of every 418 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

Why quantify the tourism economy?

- By monitoring the impact of PA's travel and tourism industry's on the state's economy, policymakers can make informed decisions regarding the funding and prioritization of tourism development.

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

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

Why is this a challenge?

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

The Tourism Satellite Account

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

Benefits of the Tourism Satellite Account

Benefits of using the TSA methodology include:

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

Key definitions

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

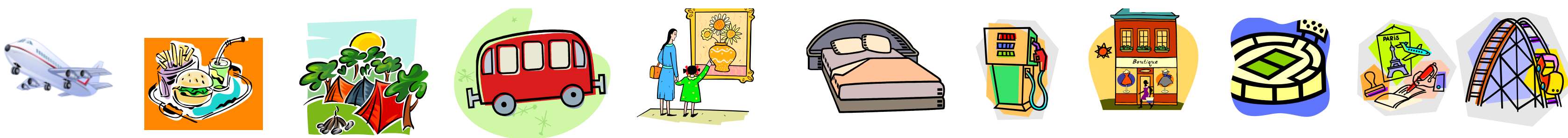
Key definitions

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

Spending Impacts

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

Businesses Catering to the Traveling Public



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

Wages paid to employees

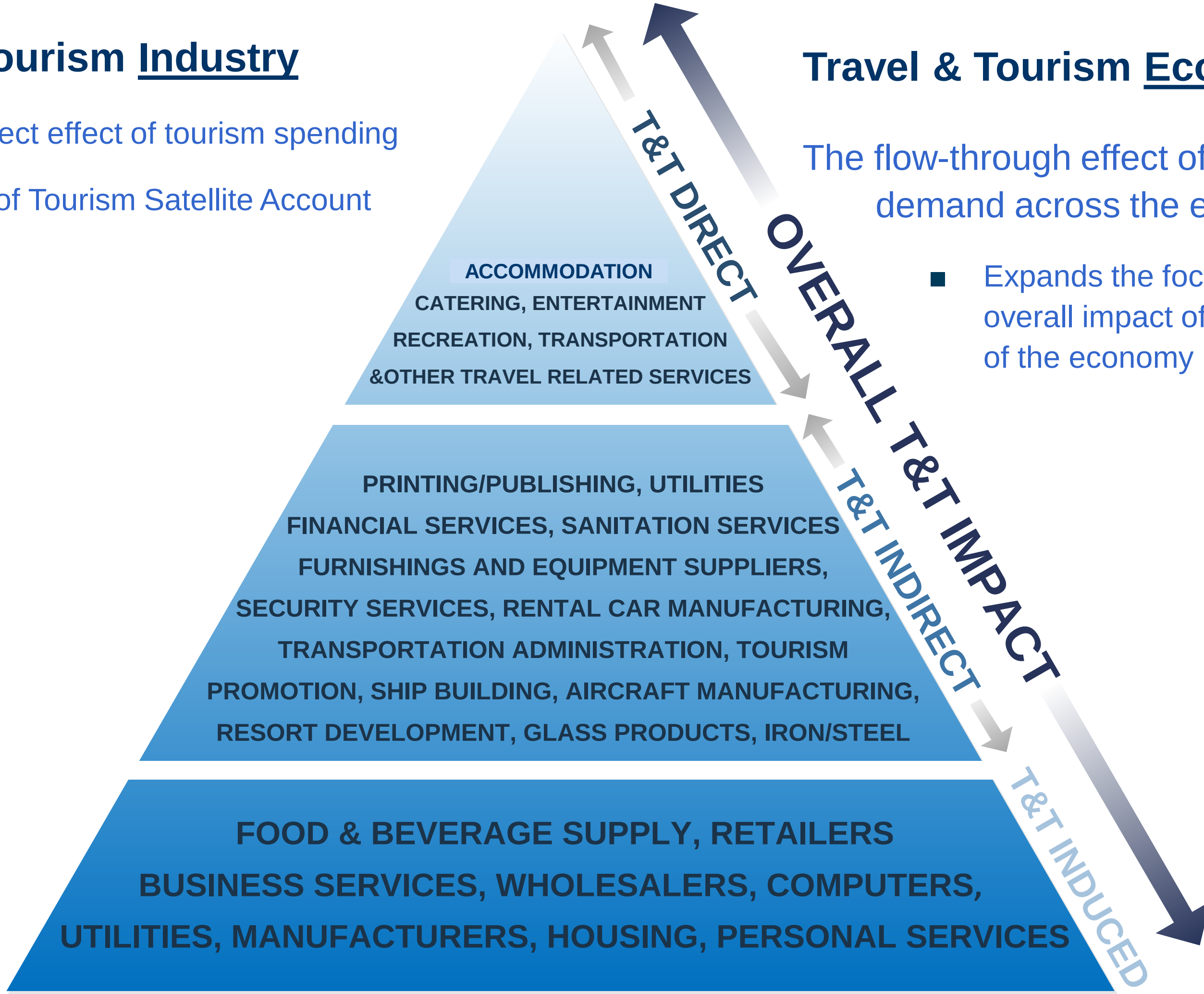
Manufacturers, Supplier and Support Businesses

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

Illustrating the concepts

Travel & Tourism Industry

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



Travel & Tourism Economy

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

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

Detailed State Results

Total US & International Traveler Spending

Key Trends

Travel Segments

Spending Categories

TOURISM ECONOMICS
AN OXFORD ECONOMICS COMPANY

Key travel trends in 2013

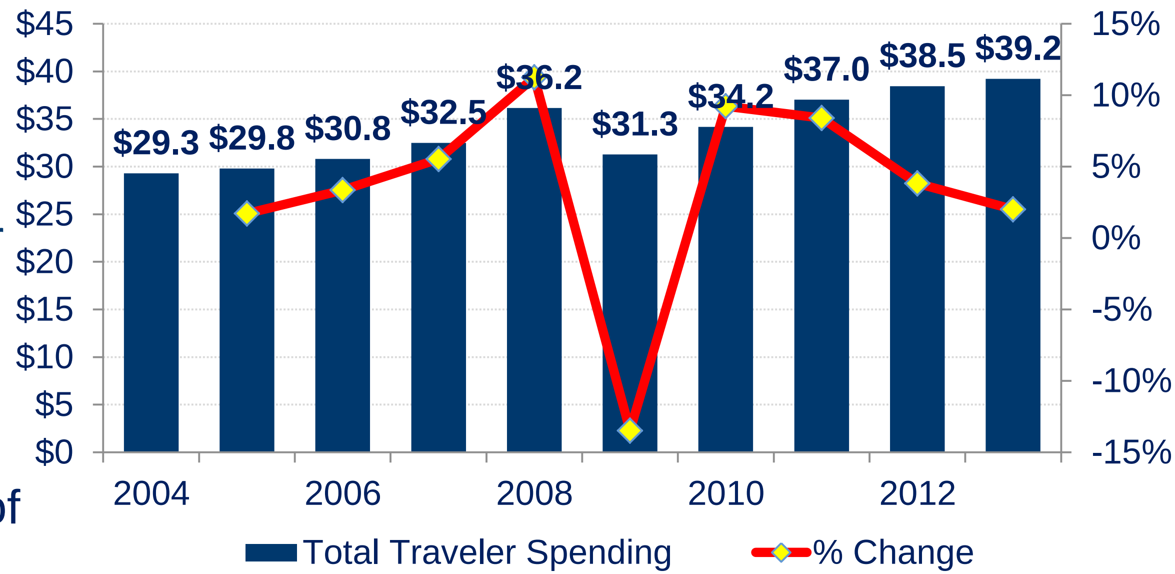
- Travel and tourism continued to be an integral component of the PA economy, with visitor spending (aka "industry sales") directly injecting $39.2 billion into the economy in 2013 – a 2.0% increase.
- Much of the increase was the result of greater spending by travelers since there was little change in the number of travelers from 2012.
- Spending increases were strongest in the food & beverage and recreation sectors – the two sectors whose recovery lagged that of other sectors following the recession. For the most part, these two sectors can be considered more closely linked to discretionary spending than transportation. As consumers gain confidence in their personal finances and price increases in the transportation sector moderate, travelers are able to spend more on discretionary goods and services.
- With continued spending increases, PA's travel- and tourism-related businesses hired people at nearly three times the rate of businesses overall in the state.

Continued growth in PA traveler spending

- Pennsylvania's total visitor spending (i.e., spending by both domestic and international travelers) reached $39.2 billion in 2013 – a new record high.
- 2013 marked the fourth straight year of PA traveler spending and visitation gains.
- Day-trip travel once again posted the strongest rate of increase in spending (+2.9%), especially compared to the 1.5% spending increase by PA's overnight travel segment.

Total traveler spending in Pennsylvania

in billions of US dollars



Includes spending by both domestic and international travelers

Source: Tourism Economics

PA 2013 traveler spending by market segment

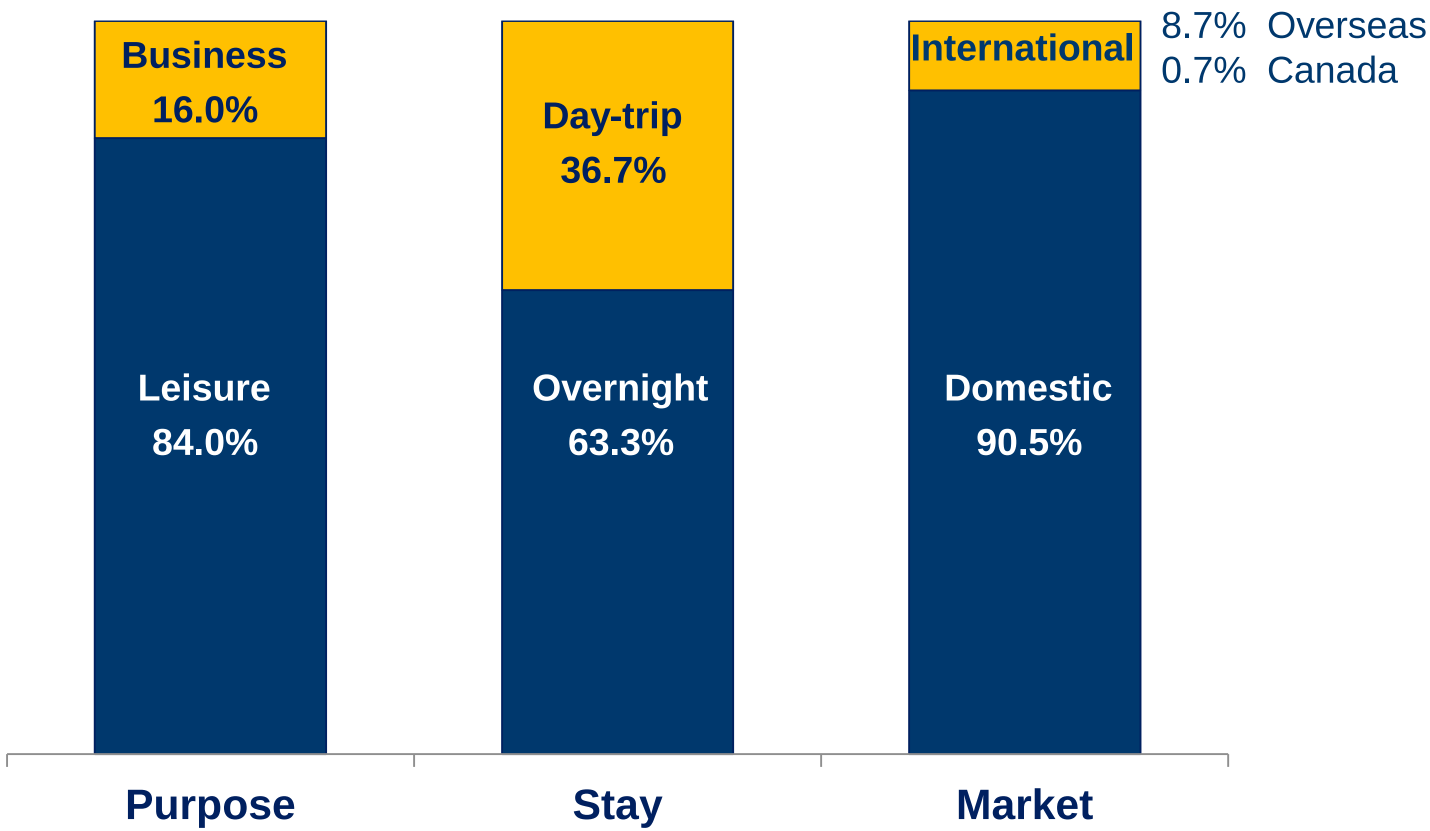
- With business travel down slightly from 2012, the growth rate in spending by PA's leisure travel segment was once again much stronger than that of the business travel segment.
- While the growth rate in spending by PA's overnight segment was roughly half that of the day-trip segment in 2013, total spending by overnight travelers was $10.4 billion more than that of the state's day-trip travelers and accounted for 63% of total traveler spending.

2013 Traveler Spending by Segment (in billions of US dollars)					
Purpose		**Stay**		**Market**	
Leisure	$32.9	Overnight	$24.8	US Domestic	$35.5
Business	$ 6.3	Day-trip	$14.4	Overseas	$ 3.4
				Canada	$ 0.3
Total	**$39.2**	**Total**	**$39.2**	**Total**	**$39.2**
Growth Rate					
Leisure	2.4%	Overnight	1.5%	US Domestic	2.1%
Business	-0.2%	Day-trip	2.9%	Overseas	1.4%
Total	**2.0%**	**Total**	**2.0%**	Canada	2.5%
Market Share					
Leisure	84.0%	Overnight	63.3%	US Domestic	90.5%
Business	16.0%	Day-trip	36.7%	Overseas	8.7%
				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) and calculated using the TSA model.

Distribution of traveler spending by market segment

- US domestic, leisure, and overnight travel remained the dominant segments for PA's travel and tourism industry in 2013. The larger growth rate in spending by domestic (US) travelers resulted in a drop in the market share of international travel compared to prior years.



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

Traveler spending by visitor type, 2012 & 2013

- The increase in traveler spending in 2013 was derived solely from leisure travel, with business travelers spending slightly less (-0.2%) than in 2012.
- As in the previous two years, the leisure segment accounted for nearly 84% of total visitor spending in PA in 2013.

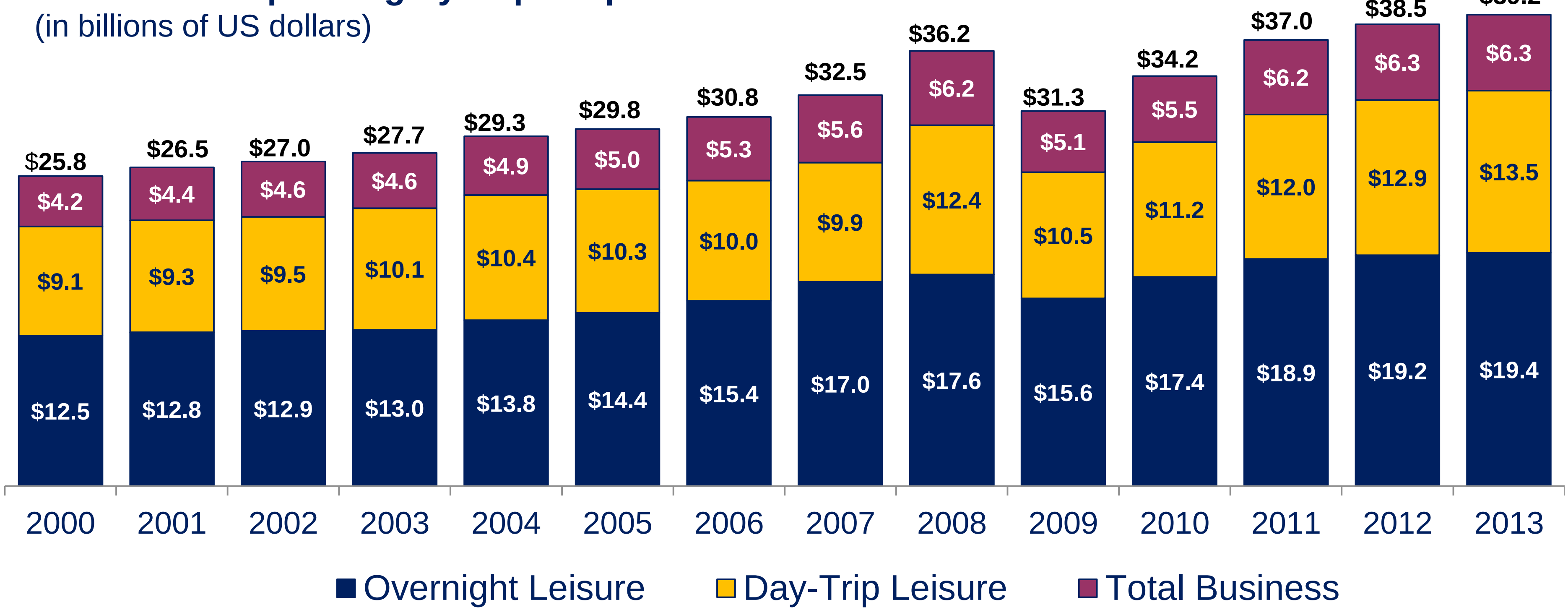
Traveler Spending by Visitor Type
(in billions of US dollars)

2013	Leisure	Business	Total
Overnight	$19.4	$5.1	$24.8
Day-Trip	$13.5	$1.2	$14.4
Total	$32.9	$6.3	$39.2
2012			
Overnight	$19.2	$5.2	$24.5
Day-Trip	$12.9	$1.1	$14.0
Total	$32.2	$6.3	$38.5
Percent Change			
Overnight	1.0%	-1.9%	1.5%
Day-Trip	4.5%	7.5%	2.9%
Total	2.4%	-0.2%	2.0%

Total traveler spending by trip purpose, 2000 - 2013

- As in 2012, the day-trip segment -- both leisure and business – drove much of the increase in total traveler spending in 2013, with the day-trip leisure segment responsible for an estimated 85% of the increase in total dollars spent by travelers.
- The business overnight travel segment was the only segment to experience a decrease in traveler spending, dropping 1.9% from 2012.

PA Traveler Spending by Trip Purpose
(in billions of US dollars)



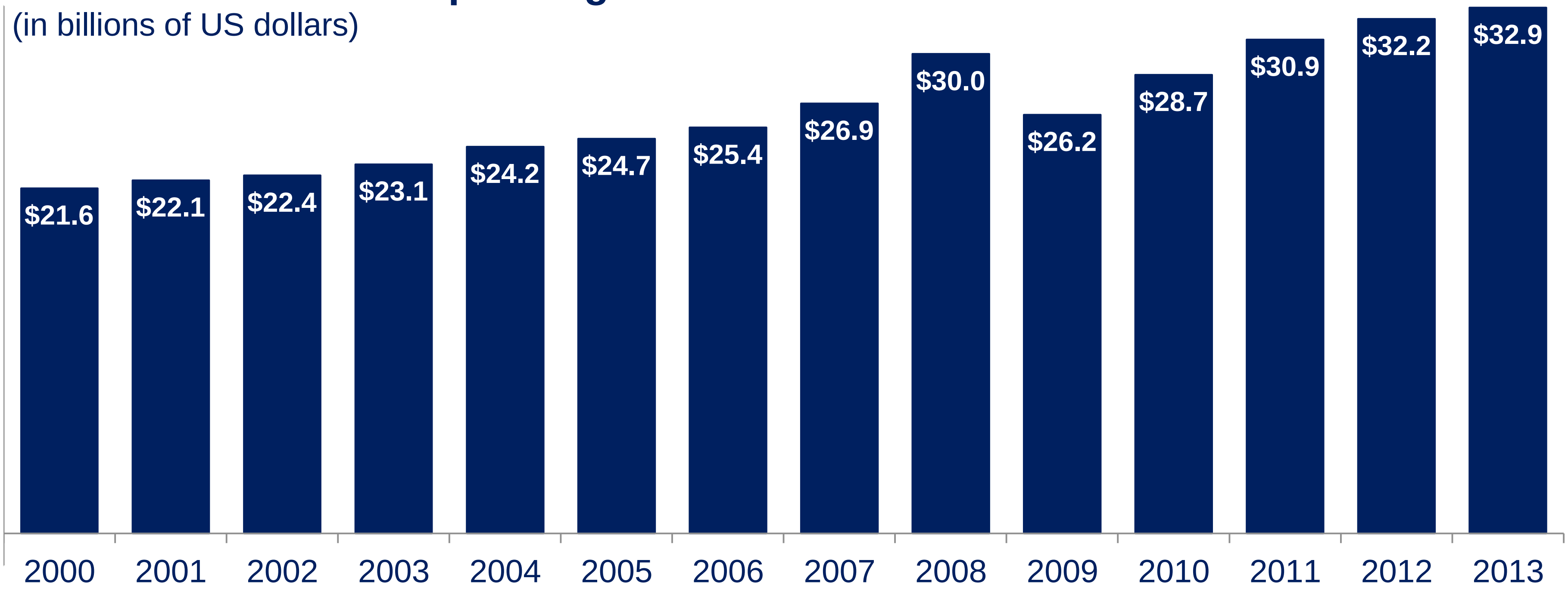
Source: Tourism Economics

TOURISM ECONOMICS

Total leisure traveler spending, 2000 - 2013

- Total leisure traveler spending grew by $0.7 billion in 2013, or 2.4%, to reach a new record high of $32.9 billion.
- As in 2012, both overnight and day-trip segments registered increases in 2013, but the strongest increase in both dollar and percentage terms was from the day-trip travel segment.

Total leisure traveler spending
(in billions of US dollars)

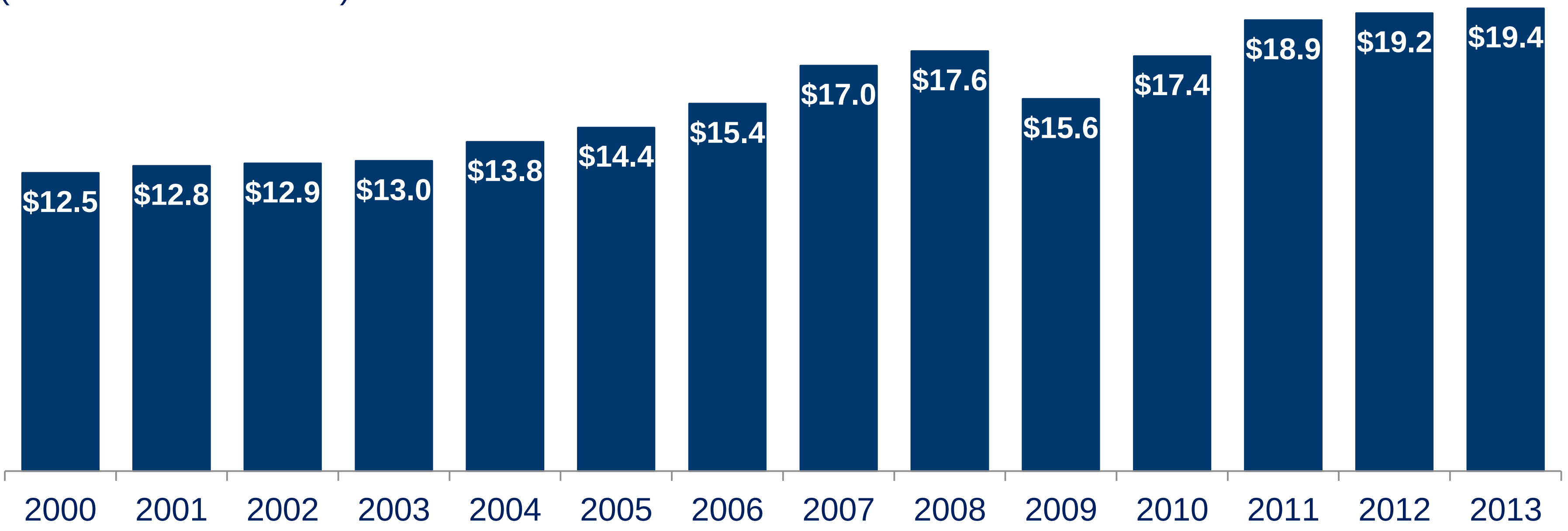


Source: Tourism Economics

Overnight leisure traveler spending, 2000 - 2013

- Spending by PA's overnight leisure travelers rose 1.0% in 2013 – the second year of subdued growth.
- Nevertheless, total overnight leisure spending in 2013 was the highest level on record in non-inflation-adjusted dollars.

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



Source: Tourism Economics

2013 traveler spending by spending category

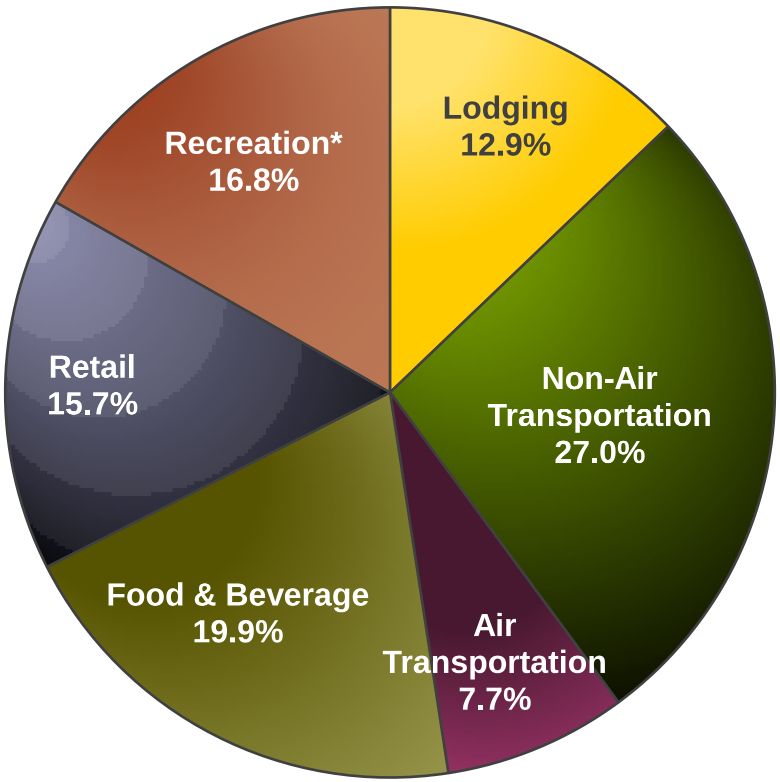
- Driven mainly by increased per visitor spending, total visitor spending rose 2.0% in 2013 – a rate of increase well below that of the prior post-recession years and the slowest pace since 2005.
- The strongest increases in terms of both dollars and in percentage terms in 2013 were in the food & beverage and recreation spending categories. The 1.8% increase in spending on lodging was largely derived from the increase in room rates since the number of rooms sold was little changed from 2012.

Total Traveler Spending by Category (in millions of US dollars)

Sector	2008	2009	2010	2011	2012	2013	% Change
Non-Air Transportation	$9,212	$7,970	$8,803	$10,076	$10,525	$10,598	0.7%
Food & Beverage	$7,442	$6,602	$7,084	$7,400	$7,529	$7,822	3.9%
Recreation	$5,637	$4,971	$5,666	$6,133	$6,366	$6,575	3.3%
Retail	$6,079	$5,145	$5,551	$5,811	$6,110	$6,166	0.9%
Lodging	$4,604	$4,046	$4,380	$4,792	$4,955	$5,045	1.8%
Air Transportation	$3,180	$2,544	$2,681	$2,821	$2,968	$3,017	1.6%
TOTAL	$36,154	$31,278	$34,165	$37,034	$38,454	$39,223	2.0%
% Change	---	-13.5%	9.2%	8.4%	3.8%	2.0%	

2013 traveler spending by spending category

Relative distribution of PA traveler spending



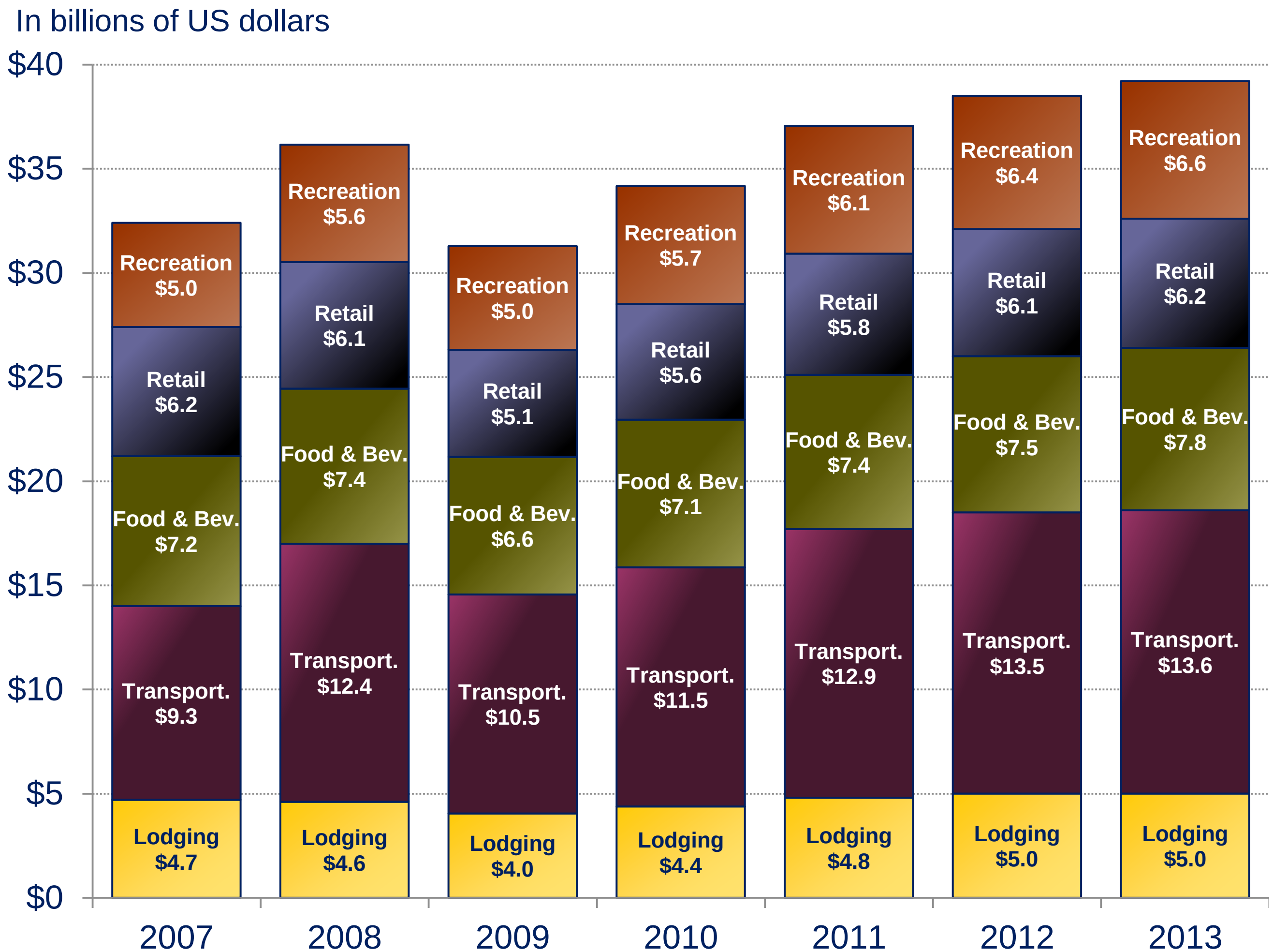
Includes spending by both domestic and international travelers.

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

Source: Tourism Economics

- There were some slight changes in the relative distribution of dollars spent by travelers in PA in 2013, with spending on food & beverages and recreation purchases up 0.4 and 0.2 percentage points, respectively.
- Transportation costs in total (both air transportation and all other transportation) accounted for more than a third of traveler spending in 2013, but down from the peak 35.1% in 2012.
- Lodging costs, while substantial and totaling over $5 billion, accounted for less than 13% of total traveler spending in PA in 2012, which was roughly the same percentage of prior years.

PA traveler spending by spending category

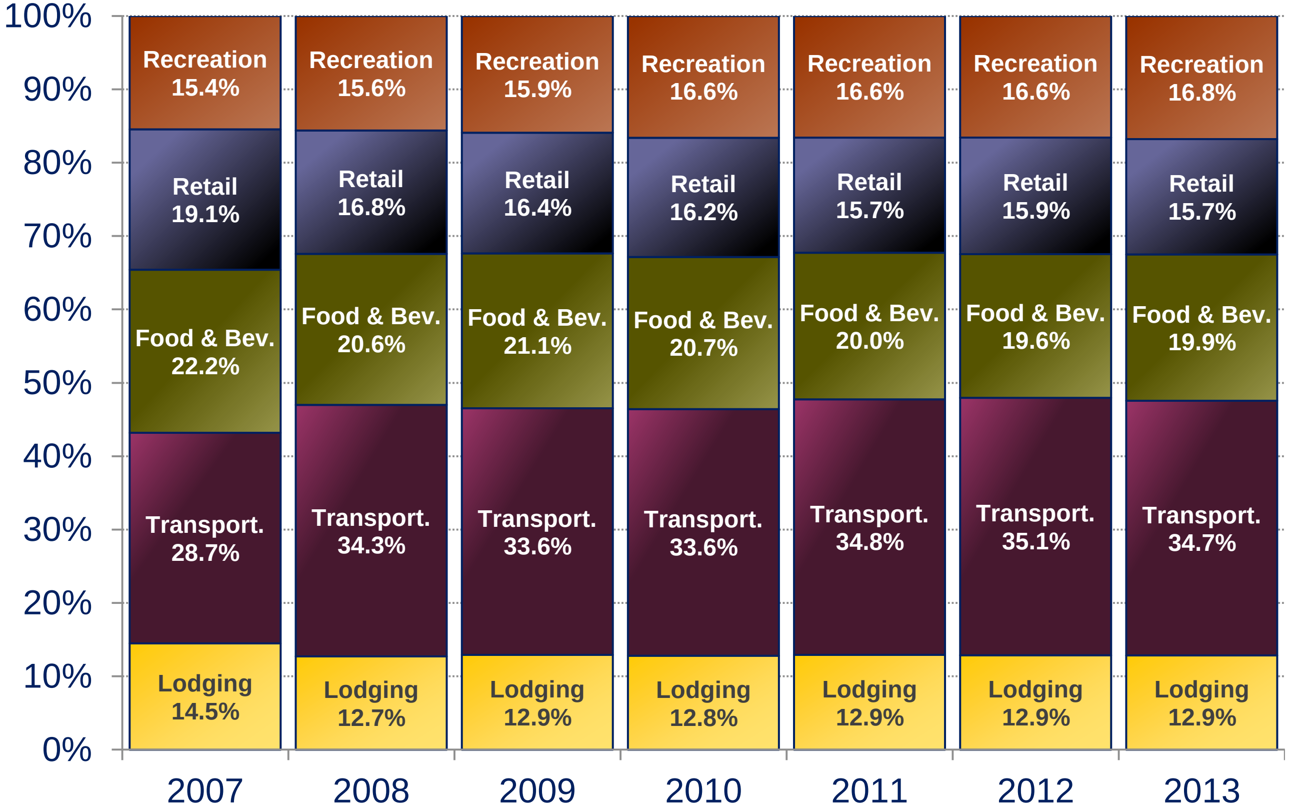


Source: Tourism Economics, Longwoods International, US Office of Travel & Tourism Industries

- While traveler spending on total transportation costs reached a record high $13.6 billion in 2013, spending on air transportation was $163 million below the segment's 2008 level despite increased spending each year.
- Traveler purchases on recreational goods and services grew by nearly a third between 2007 and 2013.
- Spending on retail purchases finally matched pre-recession levels *(in nominal dollars)* in 2013.

TOURISM ECONOMICS

Share of total traveler spending by category



Includes spending by both domestic and international travelers.

- The share of traveler spending going to recreation and food & beverage purchases increased in 2013, and was unchanged for the lodging sector.
- The share of traveler dollars going to the recreation and retail segments essentially flipped between 2008 and 2013, as spending on recreation goods and services outpaced that of retail items by more than $400 million in 2013.

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

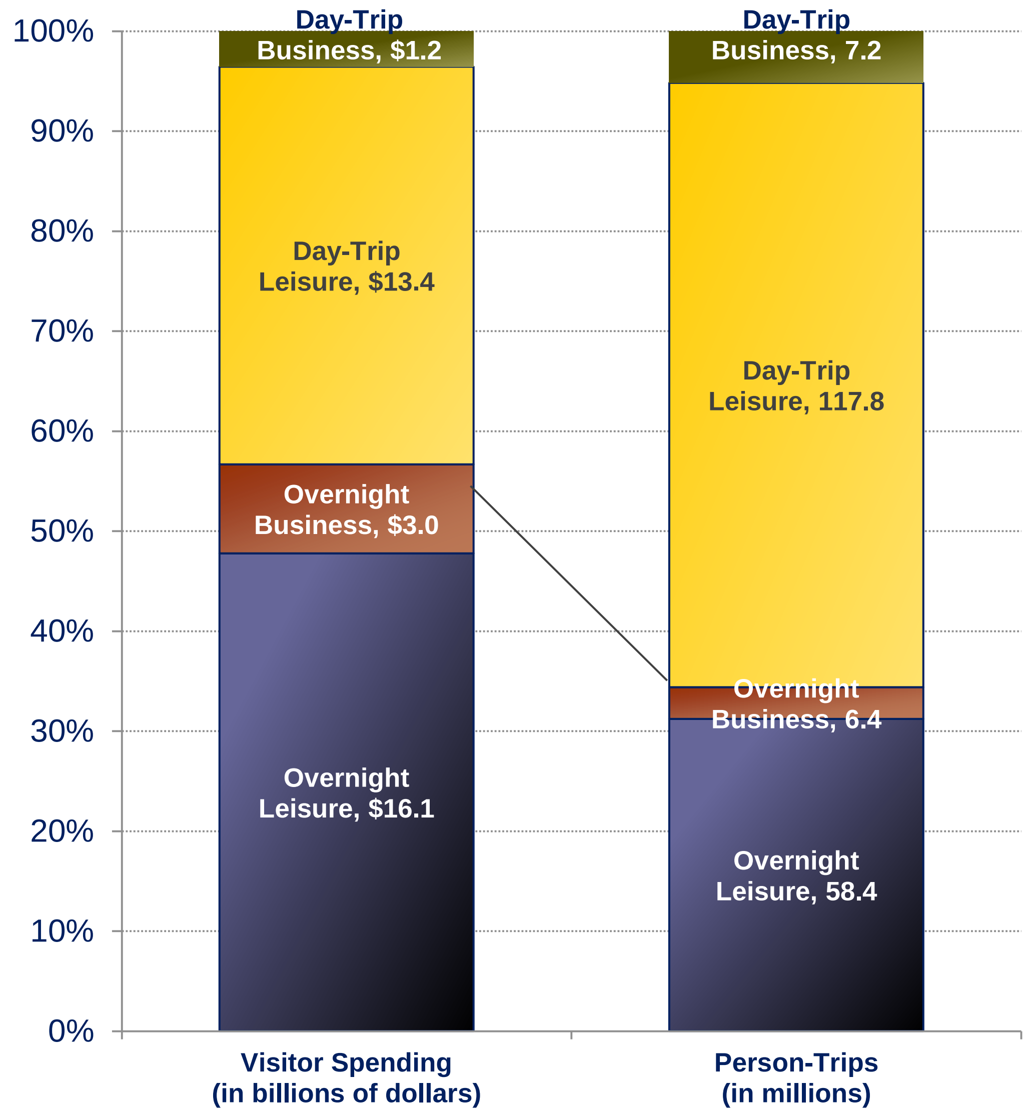
The Domestic Travel Market in Detail

Domestic visits and traveler spending

- PA's total domestic visits of 189.8 million person-trips showed a marginal increase (+0.3%) in 2013. *(Total domestic visits represent US travelers only, i.e., excludes travelers from Canada and overseas markets.)*
- Overnight visits were down 0.4% to 64.8 million person trips.
- Day trips rose 0.6% to 125.0 million.
- Domestic <u>in-state</u> visitor spending rose 3.7% to $33.7 billion in 2013. *(It is important to note this figure and the following charts do not include any 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 PA and then home again, or the portion of an airline ticket of out-of-state travelers attributable to just the part of their flight that occurs in PA. The following tables are based on traveler survey responses that do not break out the amount of an airline ticket or gasoline purchase attributable to each state.)*
- Per person-trip spending rose 3.3%, after posting almost no growth in 2012.
- With the number of person-trips showing only marginal growth, most of the increase in PA's 2013 total domestic spending was the result of higher spending by travelers as they felt more confident in their personal financial well-being.

2013 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.
- As in 2012, the Overnight Leisure segment accounted for 31% of all person-trips, but a far higher share (48%) of PA's total domestic visitor spending.



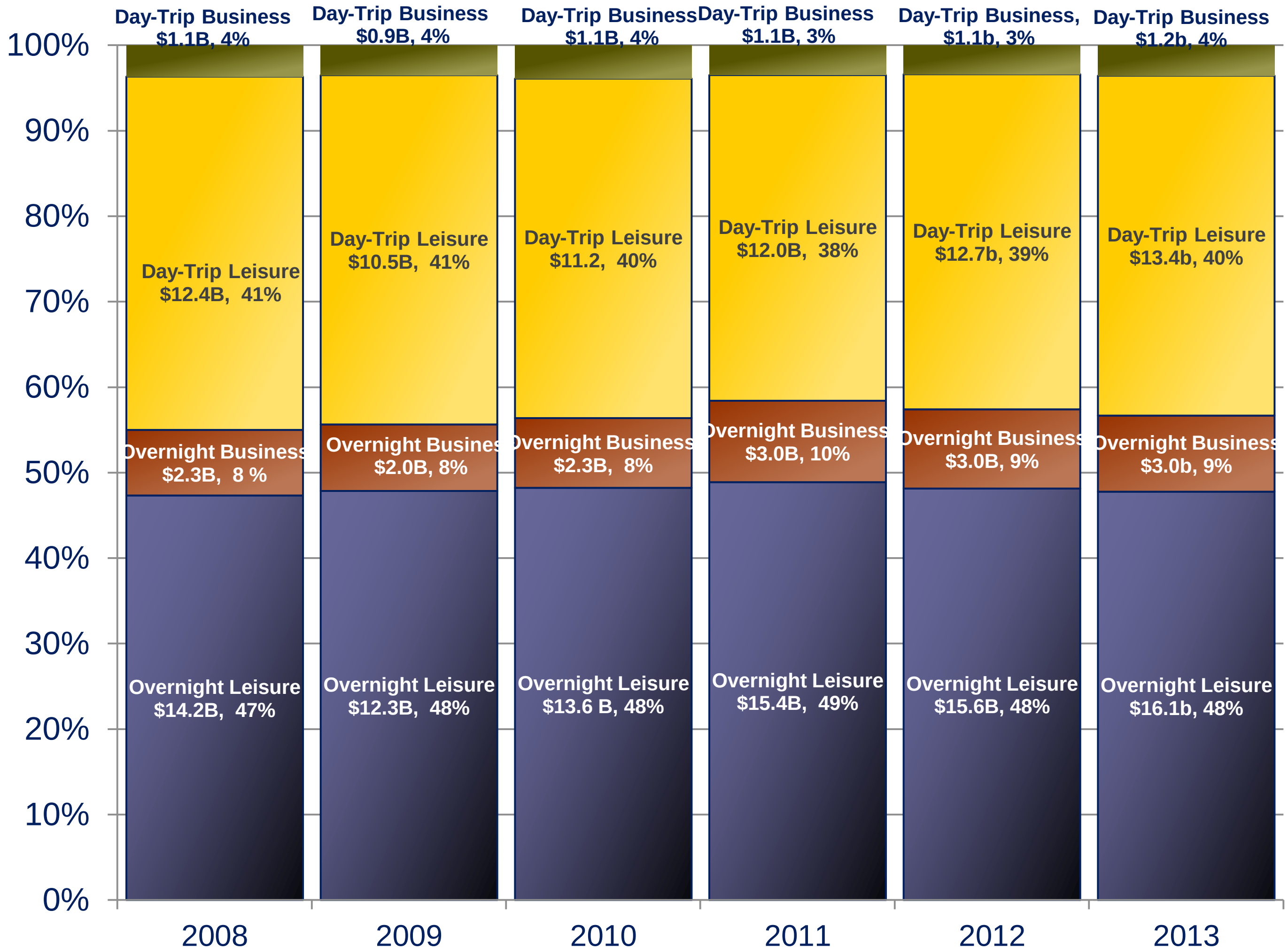
TOURISM ECONOMICS

Domestic spending trends by trip type

- The share of day-trip visitor spending rose to close to 40% in 2013 – roughly the same percentage as in 2010.
- As in 2012, the shares of both overnight travel sectors fell slightly in 2013.
- Nevertheless, nearly 57% of PA domestic traveler spending was by overnight business and leisure travelers in 2013.

Domestic traveler spending by trip type

In billions of US dollars and as Percent of total spending

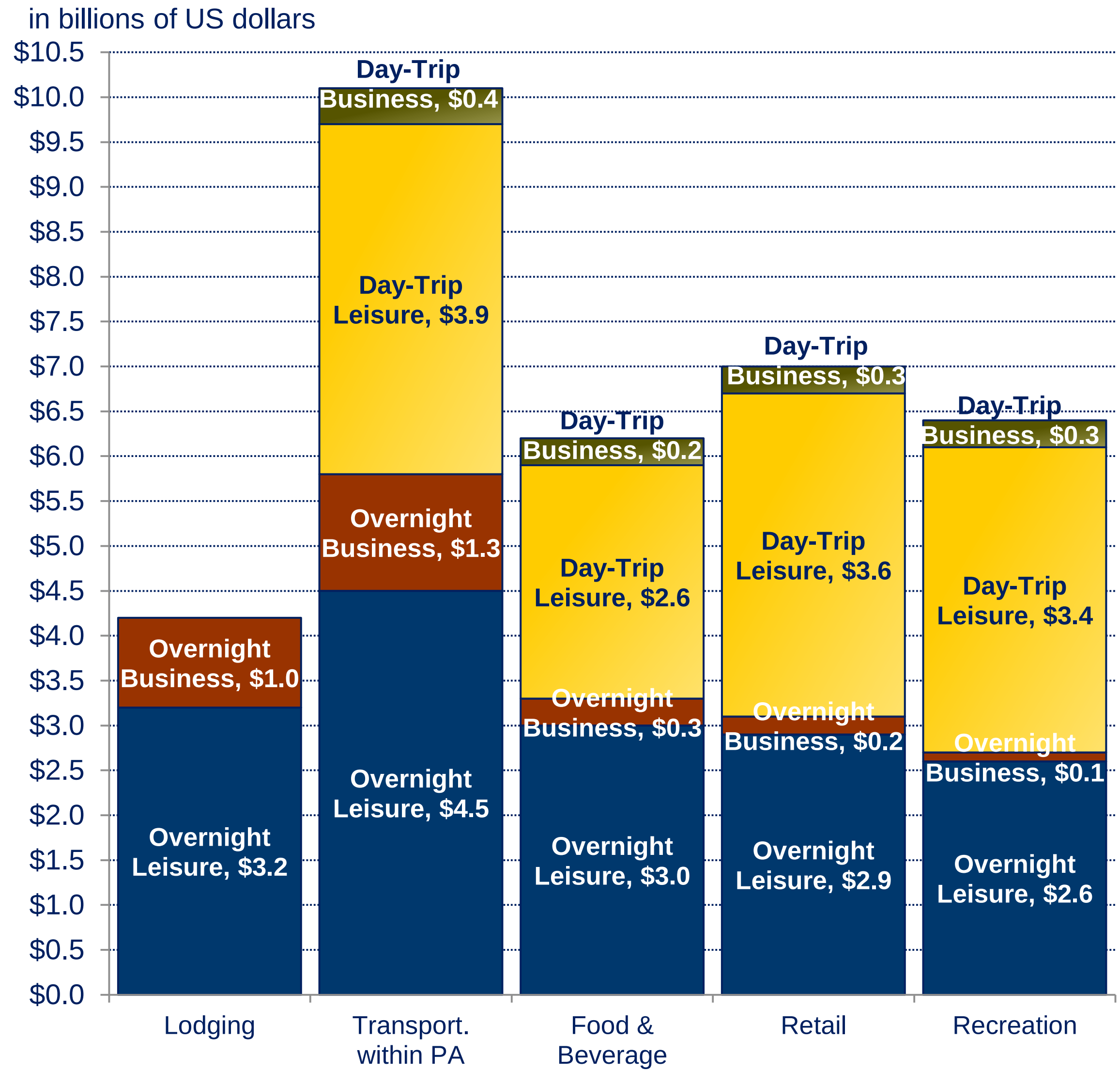


Source: Longwoods International

TOURISM ECONOMICS

2013 domestic traveler spending by spending category and trip type

- Overnight leisure travelers accounted for 76% of PA's total domestic traveler 2013 spending on lodging – a slight decrease from 2012.
- Business overnight's 24% share of lodging spending was far higher than the segment's 9% share of PA's total overnight person-trips, with lodging accounting for a third of the segment's total spending in 2013.
- Day-trip leisure visitors accounted for 53% of all domestic visitor spending on recreation in PA in 2013.

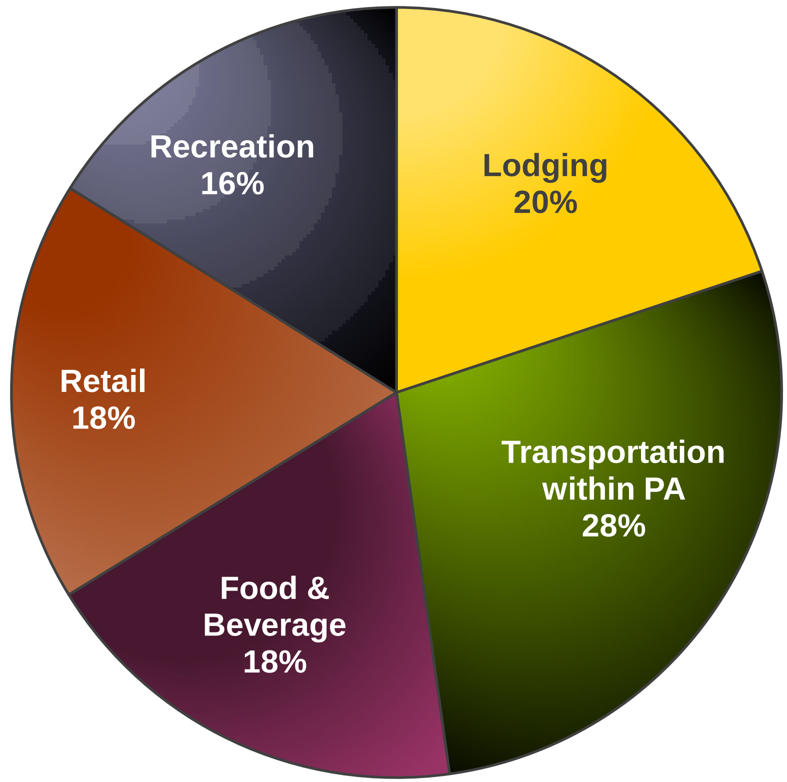


Source: Longwoods International

Overnight leisure traveler spending by category

- Pennsylvania hosted an estimated 58.4 million domestic overnight leisure travelers in 2013 (as measured in person-trips).
- These visitors spent \$16.1 billion in PA in 2013 – a \$0.5 billion increase from 2012.
- Each visitor spent an estimated \$275 per trip.
- Travelers increased their spending on recreation in 2013 both in dollar terms and proportionally, while the shares of all other spending categories were either unchanged (retail) or down compared to 2012.

2013 Overnight Leisure Traveler Spending by Category



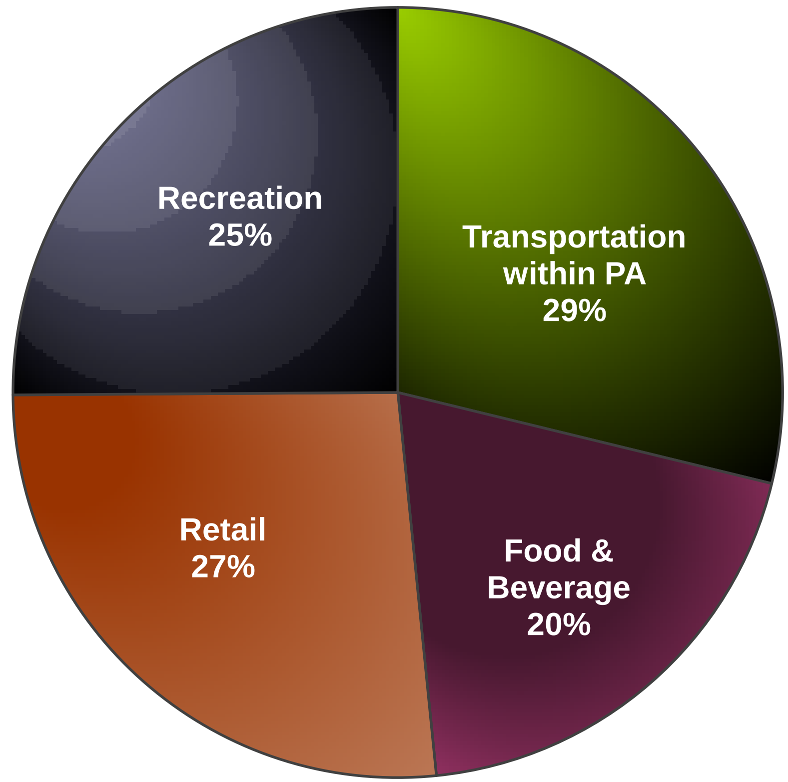
Source: Longwoods International

TOURISM ECONOMICS

Day-trip leisure traveler spending by category

- PA hosted an estimated 117.8 million day-trip leisure travelers (as measured in person-trips) in 2013.
- These visitors spent an estimated $13.4 billion in PA in 2013.
- Each visitor spent an average of $114 per trip – up from an estimated $111 in 2012.
- Travelers spent proportionally more of their total day-trip expenditures on food & beverage and retail purchases compared to 2012.

2013 Day-Trip Leisure Traveler Spending by Category

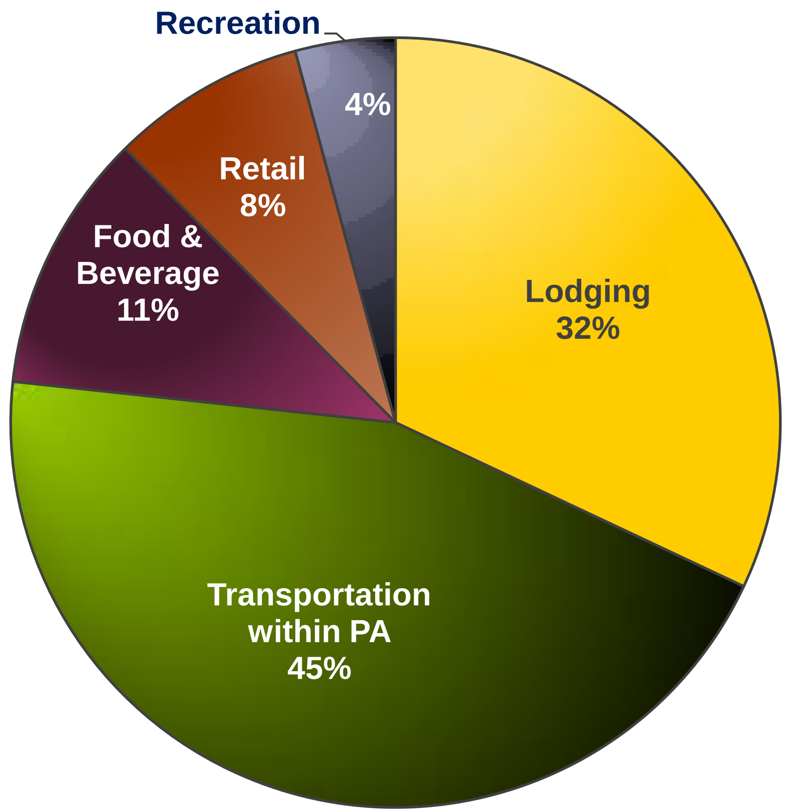


Source: Longwoods International

Overnight business traveler spending by category

- PA hosted an estimated 6.4 million domestic overnight business travelers in 2013 (as measured in person-trips).
- These visitors spent $3.0 billion in total in Pennsylvania in 2013 – essentially the same amount as in 2011 and 2012.
- Each visitor spent an average of $467 per trip – the highest of any trip type, with transportation and lodging together accounting for over three quarters of their total trip expenditures.

2013 Domestic Overnight Business Traveler Spending by Category



Source: Longwoods International

Pennsylvania's Total Tourism Economy

Tourism Satellite Account Measures

Translating Sales *(Visitor Spending) into Impact*

OXFORD ECONOMICS

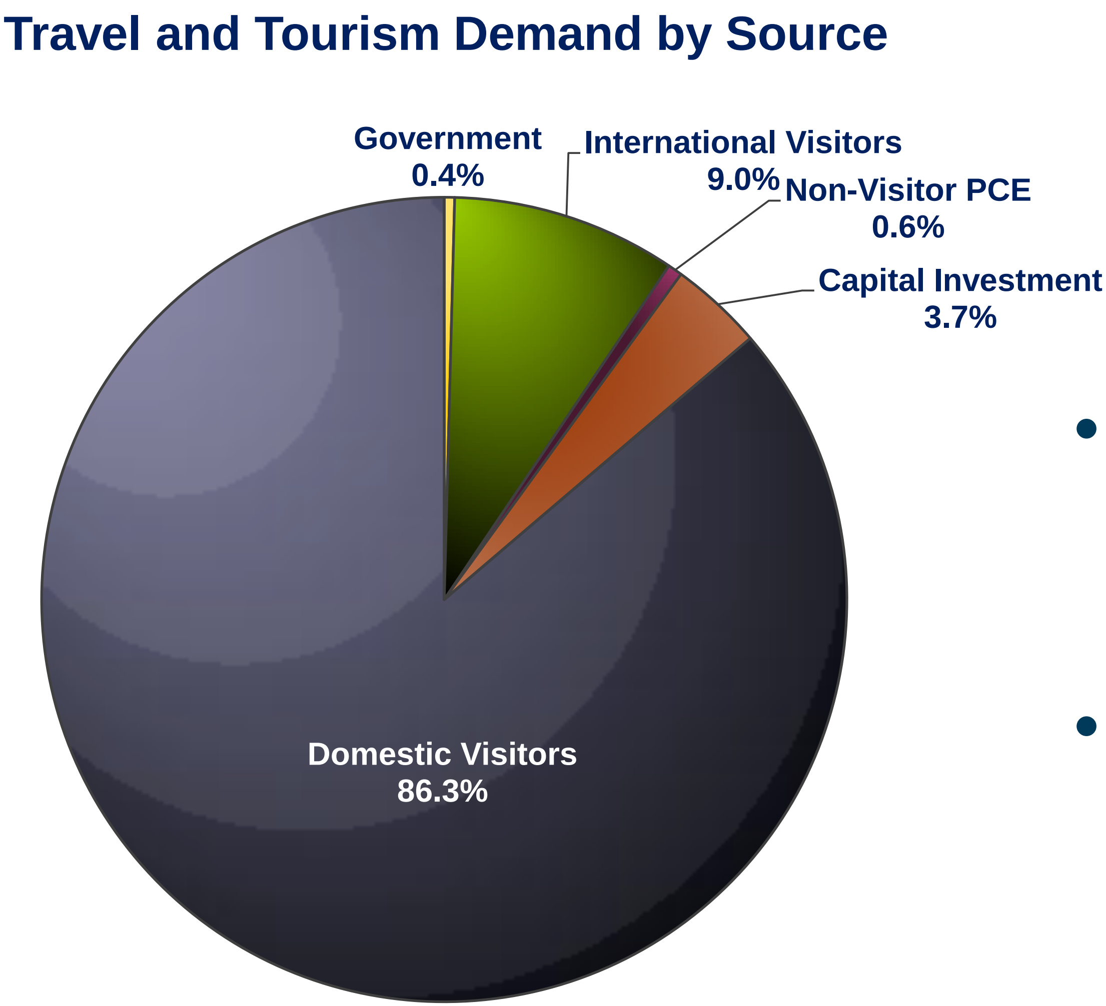
Tourism Satellite Account & total tourism demand

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

Tourism Satellite Account Total Spending by Category (in billions of US dollars)						
Calendar Year	Domestic Visitor Spending	International Visitor Spending	Non-Visitor PCE	Government Support	Capital Investment	Total
2013	$35.51	$3.71	$0.24	$0.17	$1.54	$41.17
2012	$34.79	$3.66	$0.24	$0.16	$1.57	$40.42
2011	$33.42	$3.61	$0.24	$0.16	$1.53	$38.95
2010	$30.64	$3.53	$0.24	$0.16	$1.35	$35.91
% Change, 2012-2013	2.1%	1.3%	-0.6%	5.8%	-2.1%	1.8%

- 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.

PA travel and tourism demand by source



- Domestic traveler spending continued to comprise the majority of travel- and tourism-related sales (86.3%) in PA in 2013, with the share rising 0.2 of a percentage point between 2012 and 2013, and by almost a full percentage point since 2010.
- International visitor spending accounted for 9.0% of PA total travel-related sales in 2013, down from 9.1% in 2012 and from a 9.8% share in 2010.
- Capital investment in travel-related construction and machinery & equipment represented 3.7% of travel economy sales in 2013 – down from 3.9% in 2011 and 2012.

Travel & tourism industry capital investment in PA

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

- More than $1.5 billion was invested by the travel sector in PA capital projects in 2013 – a 2.1% decrease from 2012*. (It is important to note that as more complete data became available, the estimated capital investment figures for 2011 and 2012 were revised upward and the same may be true for 2013 data in subsequent reports.*
- Increases in investment by the hotel/motel segment of approximately $60 million offset the decline in construction by the amusement and social & recreation facilities segments, which had experienced a strong investment year in 2012.

Sales to travelers in PA and total economy impact

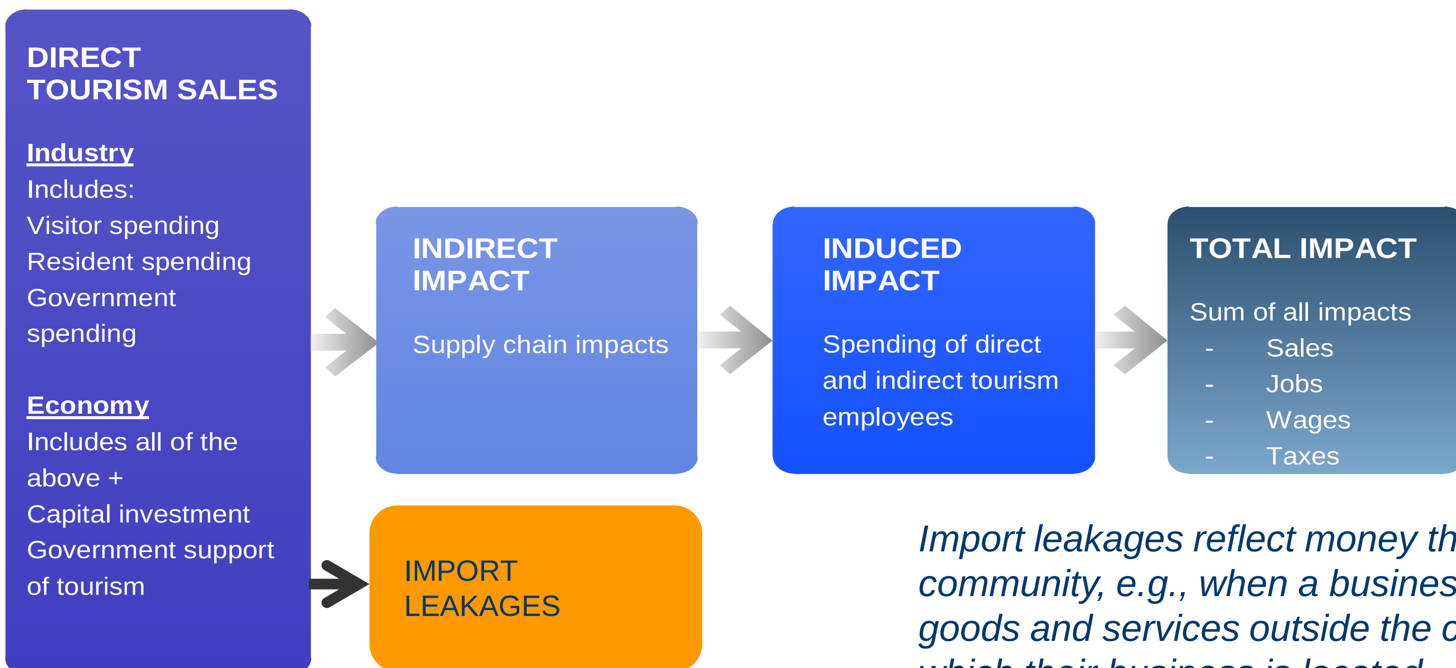
- The primary and direct impact of travel and tourism is driven by sales made to travelers. Measuring sales allows for apples-to-apples comparisons with other industries.
- The total economy/ economic_impact of travel and tourism includes capital investment in support of travel and tourism, government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

2013 PA Traveler Spending vs. Total Impact By Expenditure Category
(in millions of US dollars)

Industry	Total Traveler Spending	Total Economy Impact
Non-Air Transportation	$10,598.2	$10,598.2
Food and Beverage	$7,822.2	$7,822.2
Recreation	$6,575.1	$6,575.1
Shopping	$6,166.0	$6,166.0
Lodging	$5,045.0	$5,045.0
Air Transportation	$3,016.6	$3,016.6
Capital Investment	$0	$1,540.9
Non-Visitor Personal Consumption Exp.	$0	$ 236.6
Government	$0	$ 174.2
Total	**$39,223.2**	**$41,174.9**

Translating sales into impact

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

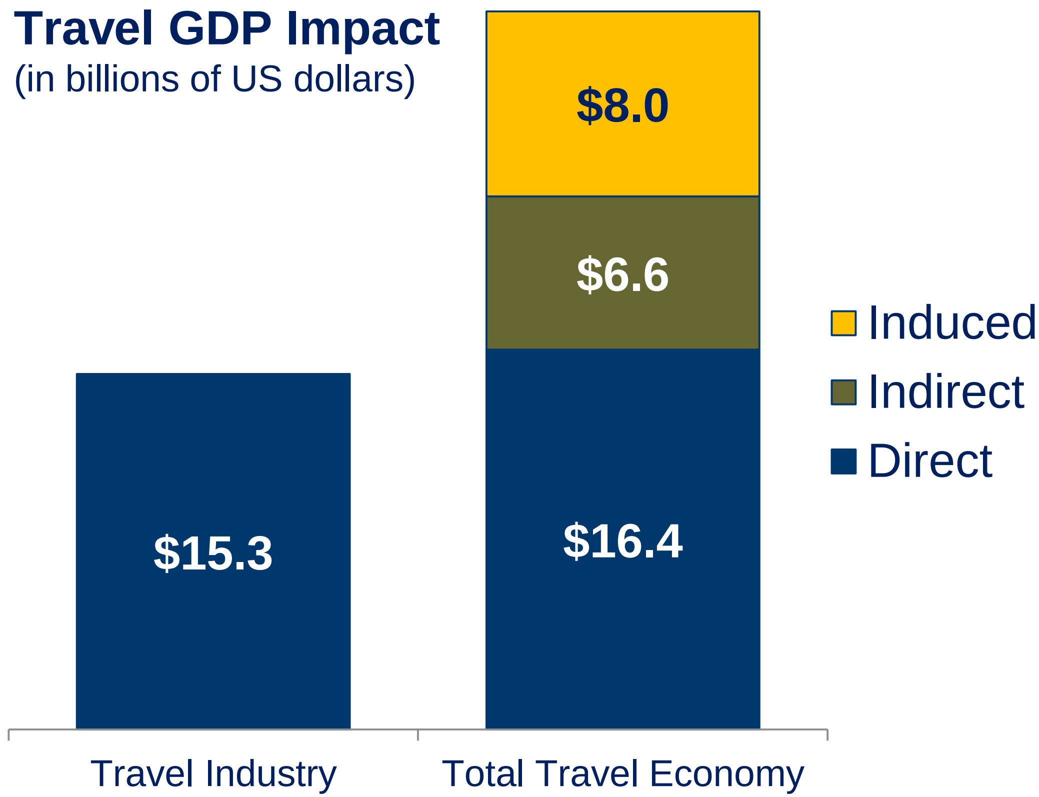


Import leakages reflect money that leaves the community, e.g., when a business purchases goods and services outside the community in which their business is located.

Impact of travel and tourism on PA's GDP

- Pennsylvania's travel and tourism industry directly contributed nearly $15.3 billion to the state's gross domestic product (GDP) in 2013.

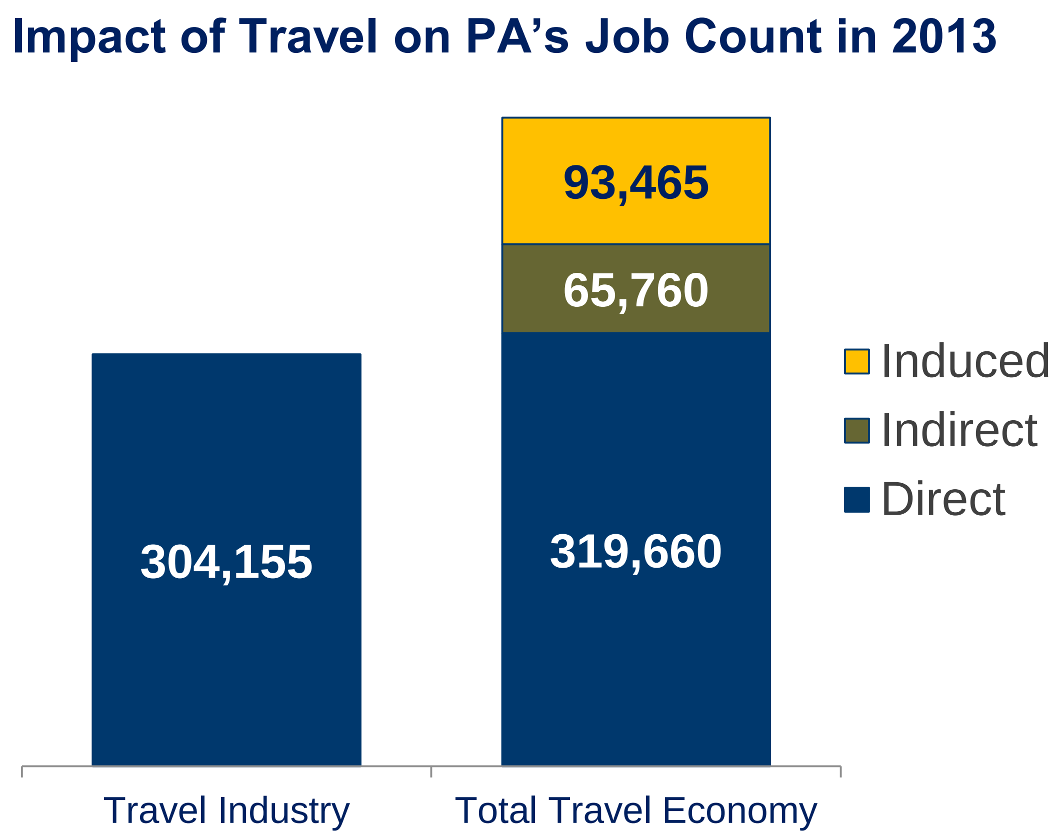
- The tourism economy (including direct, indirect and induced impacts) generated $30.9 billion in GDP in 2013 – a figure equivalent to 4.8% of the state's economy.



TOURISM ECONOMICS

Travel and tourism impact summary

- Traveler spending directly supported 304,155 jobs in Pennsylvania in 2013 (i.e., the travel and tourism industry impact).
- The travel and tourism economy (i.e., includes direct, indirect, and induced impacts) supported nearly 478,900 jobs in PA in 2013, or 6.5% of all jobs in the state – the same proportion as in 2012.



TOURISM ECONOMICS

State Tourism Industry Impacts

(Direct Impacts)

TOURISM ECONOMICS
AN OXFORD ECONOMICS COMPANY

Travel and tourism <u>industry</u> impact on GDP and jobs

2013 PA Travel and Tourism Spending Impacts (in millions of US dollars)		
Industry	**GDP (in millions)**	**Employment**
Agriculture, Fishing, Mining	--	--
Construction and Utilities	--	--
Manufacturing	--	--
Wholesale Trade	--	--
Air Transportation	$1,146	9,229
Non-Air Transportation	$1,954	25,626
Retail Trade	$1,406	33,601
Gasoline Stations	$539	8,138
Communications	--	--
Fire, Insurance, and Real Estate (FIRE)	$1,005	4,217
Business Services	--	--
Education and Health Care	--	--
Recreation and Entertainment	$2,226	44,485
Lodging	$3,136	55,103
Food & Beverage	$3,583	116,243
Personal Services	$321	7,515
Government	--	--
Total	$15,316	304,155
Percent Change	4.4%	2.0%

- Travel and tourism industry impacts include only the direct value of travel consumption and, as such, excludes capital investment and general government support of travel and tourism. This definition is consistent with national economic accounts.
- On this basis, PA's travel and tourism <u>industry</u> generated $15.3 billion to the state's gross domestic product (GDP) in 2013, or 2.4% of the state's total GDP.
- Travel and tourism spending supported 304,155 PA jobs, or 4.15% of the state's total employment number.

Why spending and GDP differ

- Traveler spending in Pennsylvania equaled $39.2 billion in 2013, yet the industry's contribution to the state's Gross Domestic Product measured just $15.3 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.

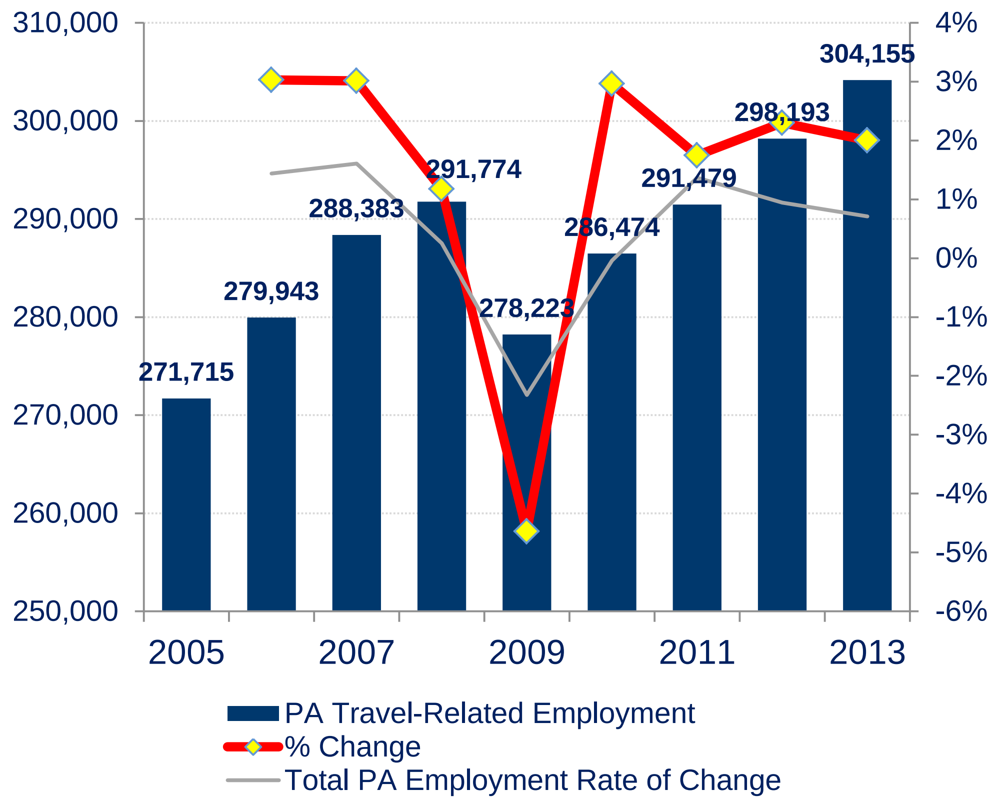
Because of these reasons, visitor spending (i.e., "sales" made to travelers) will always be substantially higher than GDP.

PA's travel-related employment rose in 2013

PA Employment Supported By Travel and Tourism									
	2005	2006	2007	2008	2009	2010	2011	2012	2013
Employment	271,715	279,943	288,383	291,774	278,223	286,474	291,479	298,193	304,155
% Change		3.0%	3.0%	1.2%	-4.6%	3.0%	1.7%	2.3%	2.0%

- The relatively strong increase in visitor spending in 2013 helped support the 2.0% increase in employment at PA's travel- and tourism-related businesses.

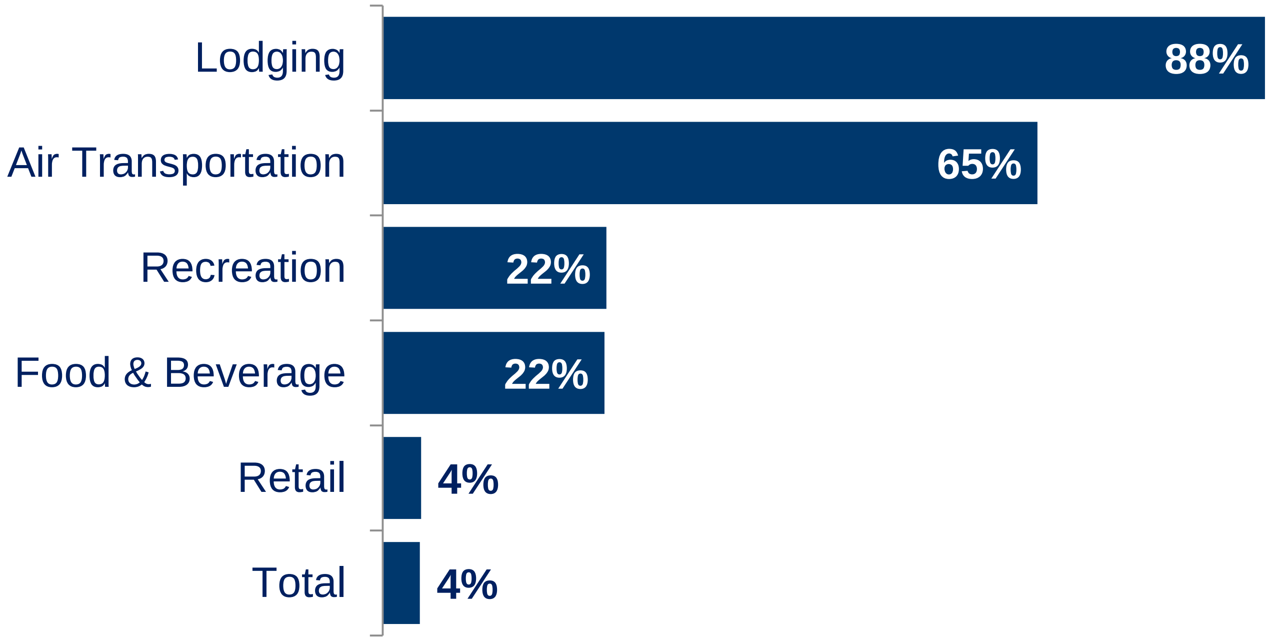
- The 2.0% increase in PA's travel- and tourism-related employment number was nearly three times the 0.7% rate of growth in overall state employment growth in 2013.



PA travel-related employment intensity by industry

- Travel and tourism represents a significant portion of employment in the lodging, air transportation, food & beverage, and recreation sectors, and roughly 4% of the state total.
- These proportions are relatively unchanged from 2012.

Travel and Tourism-Related Employment Intensity by Industry



Ranking tourism-generated employment

- Travel and tourism continued to rank as PA's 10th largest employer in 2013 with a direct travel-related employment number of 304,155. (*Note: Travel and tourism does not have an official "industry code," but is responsible for a portion of jobs reported for industries with official NAICS codes (e.g., accommodations, food & beverage, retail trade, transportation, etc.).*

Tourism-generated employment: 304,155

Employment Ranking - Private Sector State of Pennsylvania		
Rank	**Industry**	**2013**
1	Health care and social assistance	1,030,071
2	Retail trade	771,432
3	Manufacturing	593,373
4	Professional, scientific, and technical services	483,036
5	Accommodation and food services	472,614
6	Other services, except public administration	416,383
7	Finance and insurance	402,442
8	Administrative and waste management services	378,568
9	Construction	366,086
10	Educational services	277,372
11	Transportation and warehousing	271,063
12	Wholesale trade	246,521
13	Real estate and rental and leasing	239,465
14	Arts, entertainment, and recreation	163,430
15	Management of companies and enterprises	138,605

State Travel and Tourism Economy Impacts

(Direct, Indirect, and Induced Impacts)

TOURISM ECONOMICS
AN OXFORD ECONOMICS COMPANY

PA's travel economy – GDP impacts by industry

- Pennsylvania's travel and tourism industry generated nearly $31 billion in total to the state's Gross Domestic Product (GDP) in 2013 -- a 3.4% increase from 2012.
- The following table shows the direct, indirect, and induced impact of travel and tourism on Pennsylvania's GDP for the various industry sectors.

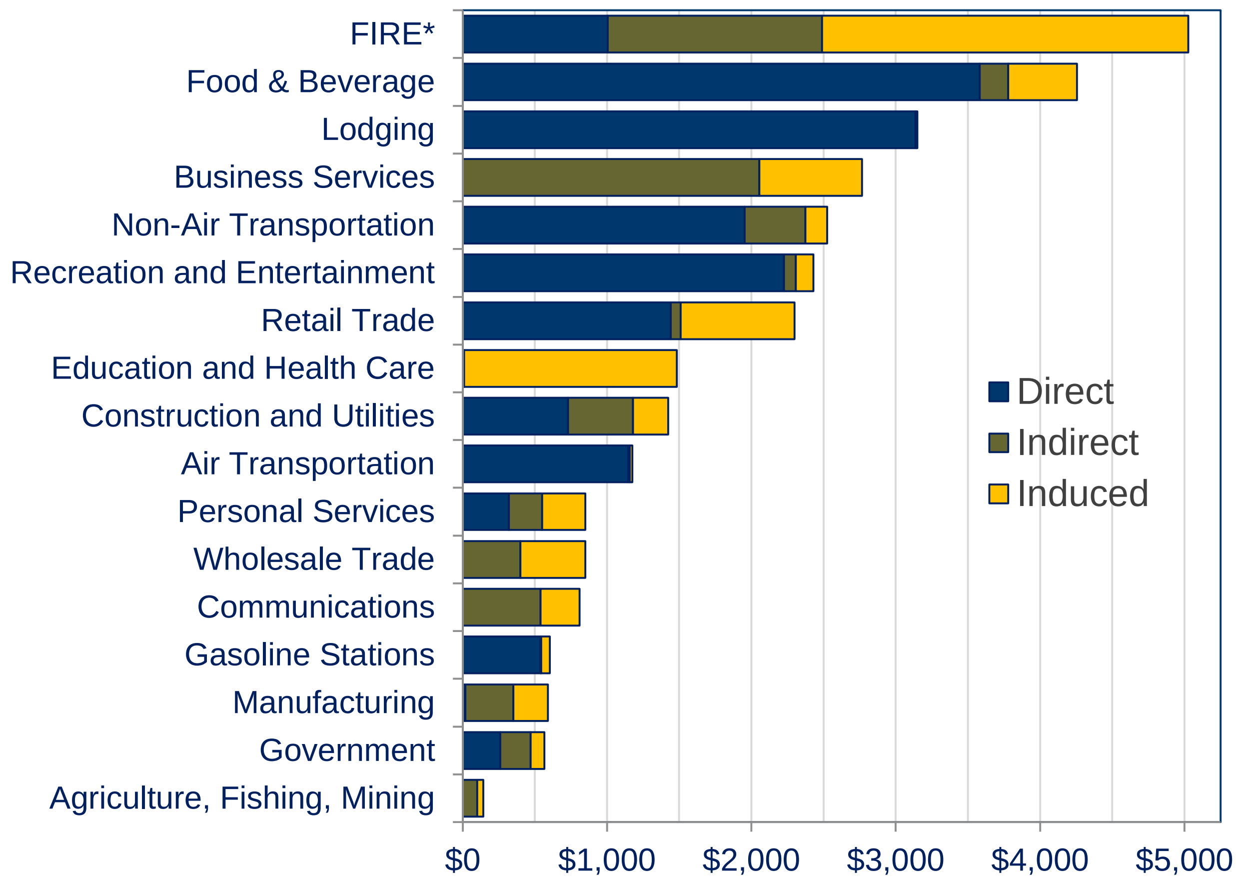
2013 PA Travel Economy GDP (*Value Added)*
(in millions of US dollars)

Industry	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	$ --	$100	$43	$143
Construction and Utilities	730	450	243	1,424
Manufacturing	19	333	238	589
Wholesale Trade	--	401	448	849
Air Transportation	1,146	11	19	1,176
Non-Air Transportation	1,954	421	149	2,525
Retail Trade	1,441	70	788	2,299
Gasoline Stations	539	6	59	605
Communications	--	540	269	809
Finance, Insurance, Real Estate (FIRE)	1,005	1,485	2,536	5,027
Business Services	--	2,056	710	2,766
Education and Health Care	--	10	1,474	1,484
Recreation and Entertainment	2,226	82	121	2,430
Lodging	3,136	6	7	3,149
Food & Beverage	3,583	197	475	4,255
Personal Services	321	230	298	849
Government	261	209	95	566
Total	$16,362	$6,608	$7,974	$30,944
Percent Change from 2012	4.2%	2.9%	2.4%	3.4%

PA's travel economy – GDP impacts by industry

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

2013 Travel Economy GDP Impact by Industry
(in millions of US dollars)



*Finance, Insurance, Real Estate

TOURISM ECONOMICS

PA travel <u>economy</u> – employment impacts by industry

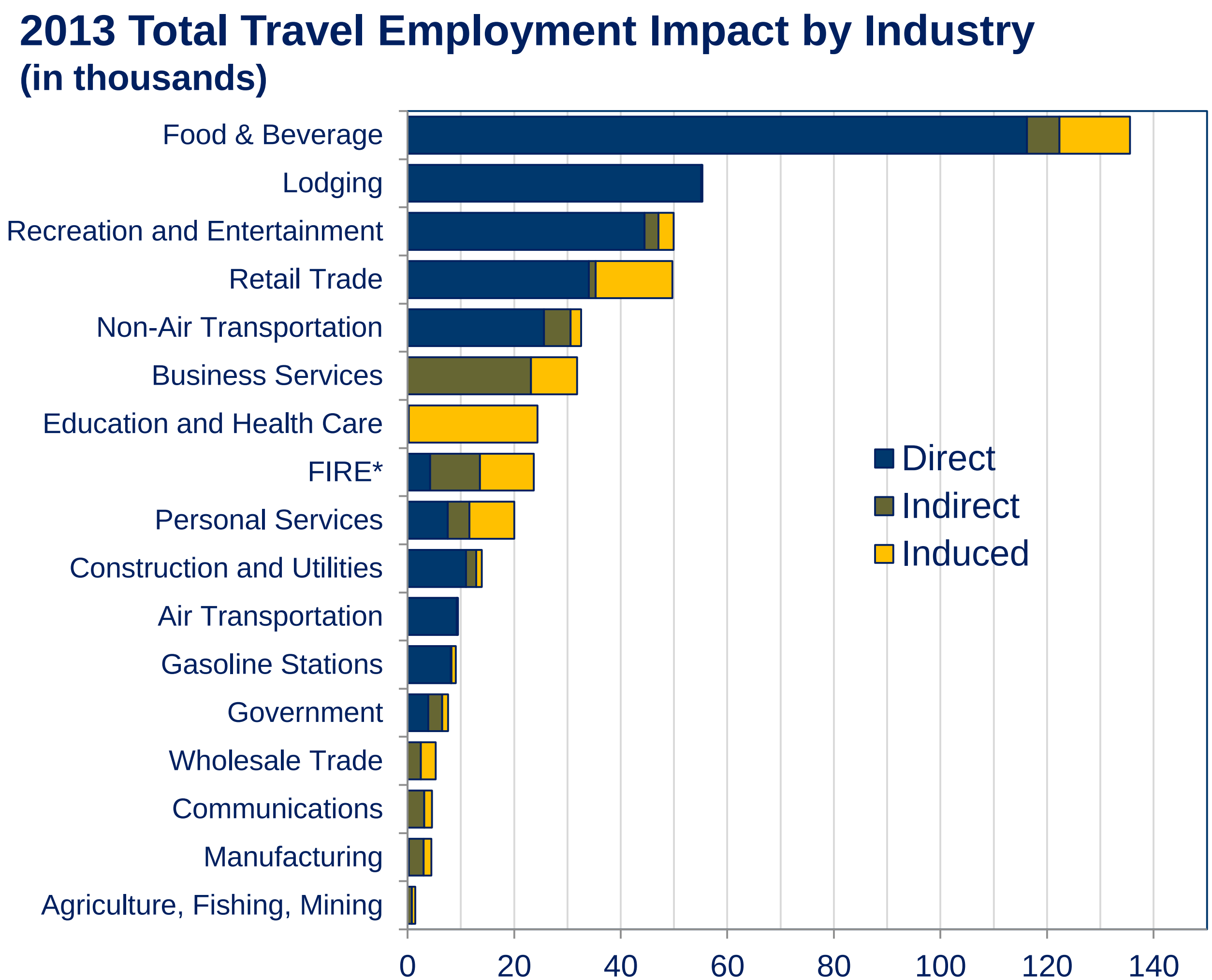
- Pennsylvania's travel and tourism industry supported 478,888 jobs in total, or 6.5% of PA's total employment in 2013, a proportion that was unchanged from 2012.
- The total presented below reflects the broadest measurement of employment, i.e., includes businesses directly serving the traveling public and their support industries, as well as jobs supported by government spending, capital investment, and private consumption expenditures.

2013 PA Travel-Related Employment (*Value Added)*

Industry	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	--	811	651	1,462
Construction and Utilities	10,975	1,883	1,048	13,906
Manufacturing	248	2,772	1,444	4,464
Wholesale Trade	--	2,489	2,783	5,272
Air Transportation	9,229	90	150	9,469
Non-Air Transportation	25,626	4,948	2,016	32,590
Retail Trade	34,026	1,293	14,368	49,686
Gasoline Stations	8,138	94	845	9,076
Communications	--	3,117	1,452	4,568
Finance, Insurance, Real Estate (FIRE)	4,217	9,370	10,101	23,688
Business Services	--	23,161	8,662	31,823
Education and Health Care	--	237	24,145	24,382
Recreation and Entertainment	44,485	2,606	2,860	49,951
Lodging	55,103	102	121	55,325
Food & Beverage	116,243	6,083	13,239	135,565
Personal Services	7,515	4,094	8,438	20,047
Government	3,858	2,612	1,141	7,612
Total	319,661	65,762	93,465	478,888
Percent Change from 2012	1.9%	1.5%	1.0%	1.7%

PA travel economy – employment impacts by industry

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



*Finance, Insurance, Real Estate

Travel economy – labor income impacts by industry

Traveler spending generated close to $19 billion in income for persons employed by PA businesses supported in some way by travel and tourism in 2013.

2013 PA Travel-Related Labor Income (Compensation)
(in millions of US dollars)

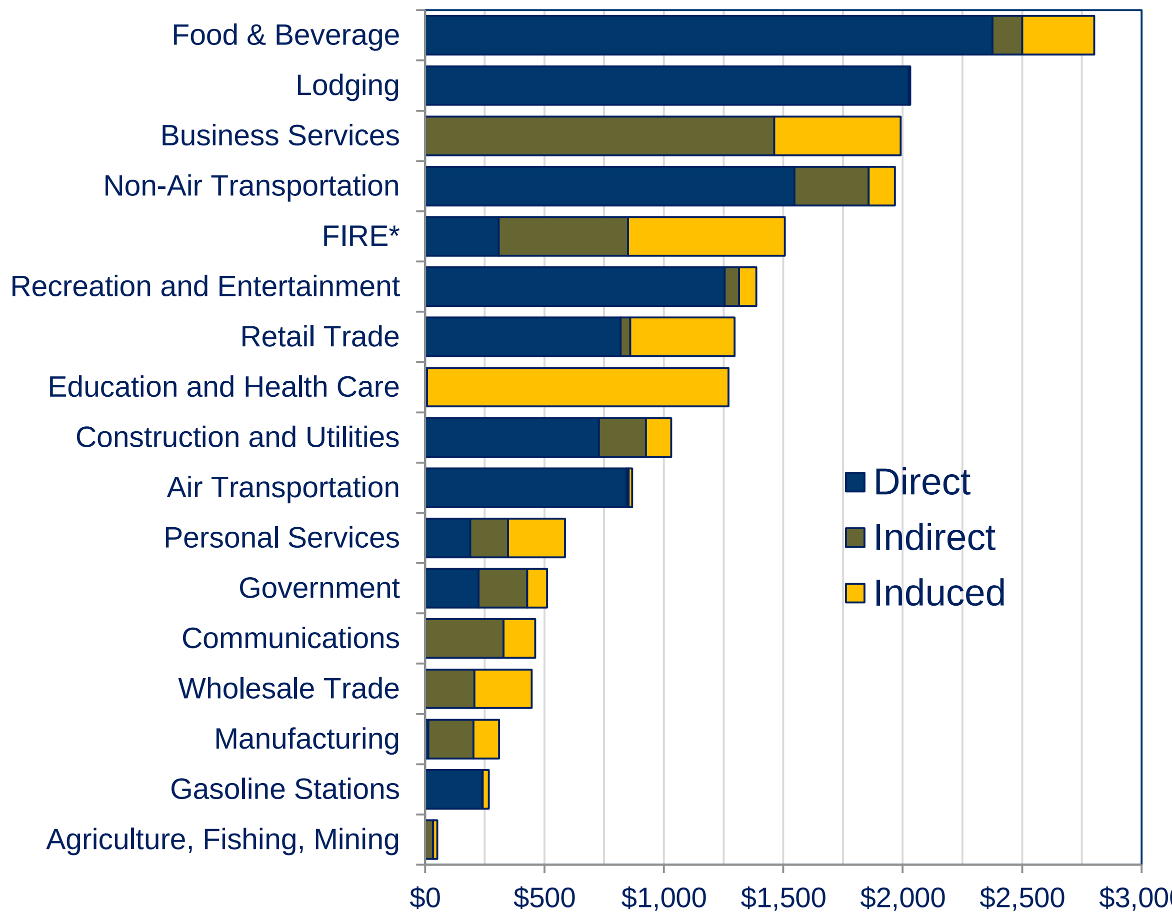
Industry	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	$ --	$34.4	$17.7	$52.1
Construction and Utilities	727.7	197.3	106.3	1,029.3
Manufacturing	14.6	187.9	107.6	310.1
Wholesale Trade	--	207.6	239.0	446.6
Air Transportation	845.2	8.1	13.9	867.2
Non-Air Transportation	1,547.0	310.0	110.0	1967.0
Retail Trade	819.1	39.7	436.9	1,295.7
Gasoline Stations	238.5	2.8	25.7	267.0
Communications	--	328.3	133.8	462.1
Finance, Insurance, Real Estate (FIRE)	309.3	541.3	656.3	1,506.9
Business Services	--	1,461.8	529.1	1,990.9
Education and Health Care	--	8.4	1,261.6	1,270.0
Recreation and Entertainment	1,254.3	60.5	72.0	1,386.8
Lodging	2,025.0	3.2	4.0	2,032.2
Food & Beverage	2,375.6	124.7	301.2	2,801.5
Personal Services	190.0	157.1	238.6	585.7
Government	224.4	203.3	83.9	511.6
Total	$10,568.8	$3,876.6.3	$4,337.5	$18,782.8
Percent Change from 2012	5.2%	3.6%	3.4%	4.5%

Travel economy – labor income impacts by industry

- Traveler spending generated close to $19 billion in labor income in 2013, with the direct impact led by traveler intensive industries, i.e., restaurants, lodging, and transportation.

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

2013 Total Labor Income Impact by Industry
(in millions of US dollars)



*Finance, Insurance, Real Estate

TOURISM ECONOMICS

Travel economy – tax generation

- Travelers were responsible for more than $4.1 billion in state and local tax revenues and an additional $4.2 billion in federal taxes in 2013.
- Pennsylvania's state and local governments would have to tax each PA household an additional $835 per year to replace the taxes generated by travel and tourism.

2013 Traveler-Generated Taxes
(in millions of US dollars)

Tax Type	2009	2010	2011	2012	2013	% Change
Federal Taxes	**$3,505.1**	**$3,681.6**	**$3,856.4**	**$4,007.8**	**$4,163.9**	**3.9%**
Corporate	349.2	369.5	387.1	405.3	411.8	1.6%
Indirect Business	332.3	351.6	368.3	385.7	391.8	1.6%
Personal Income	1,035.3	1,085.5	1,137.0	1,179.5	1,232.1	4.5%
Social Security	1,788.3	1,875.0	1,964.0	2,037.3	2,128.2	4.5%
State and Local Taxes	**$3,378.5**	**$3,572.6**	**$3,799.2**	**$4,023.6**	**$4,132.6**	**2.8%**
Corporate	214.7	235.9	250.5	265.9	270.2	1.6%
Personal Income	325.1	340.8	357.0	370.3	386.9	4.5%
Sales	1,199.7	1,316.7	1,441.5	1,507.6	1,533.6	1.9%
Hotel Occupancy	112.2	121.7	133.1	143.6	152.9	6.5%
Property	1,030.2	1,032.3	1,066.9	1,155.6	1,195.5	3.4%
Excise and Fees	468.3	495.6	519.1	548.3	559.9	2.1%
PA Unemployment	28.3	29.6	31.1	32.2	33.7	4.5%
TOTAL	**$6,883.5**	**$7,254.3**	**$7,655.7**	**$8,031.4**	**$8,296.5**	**3.3%**

Pennsylvania’s Tourism Regions

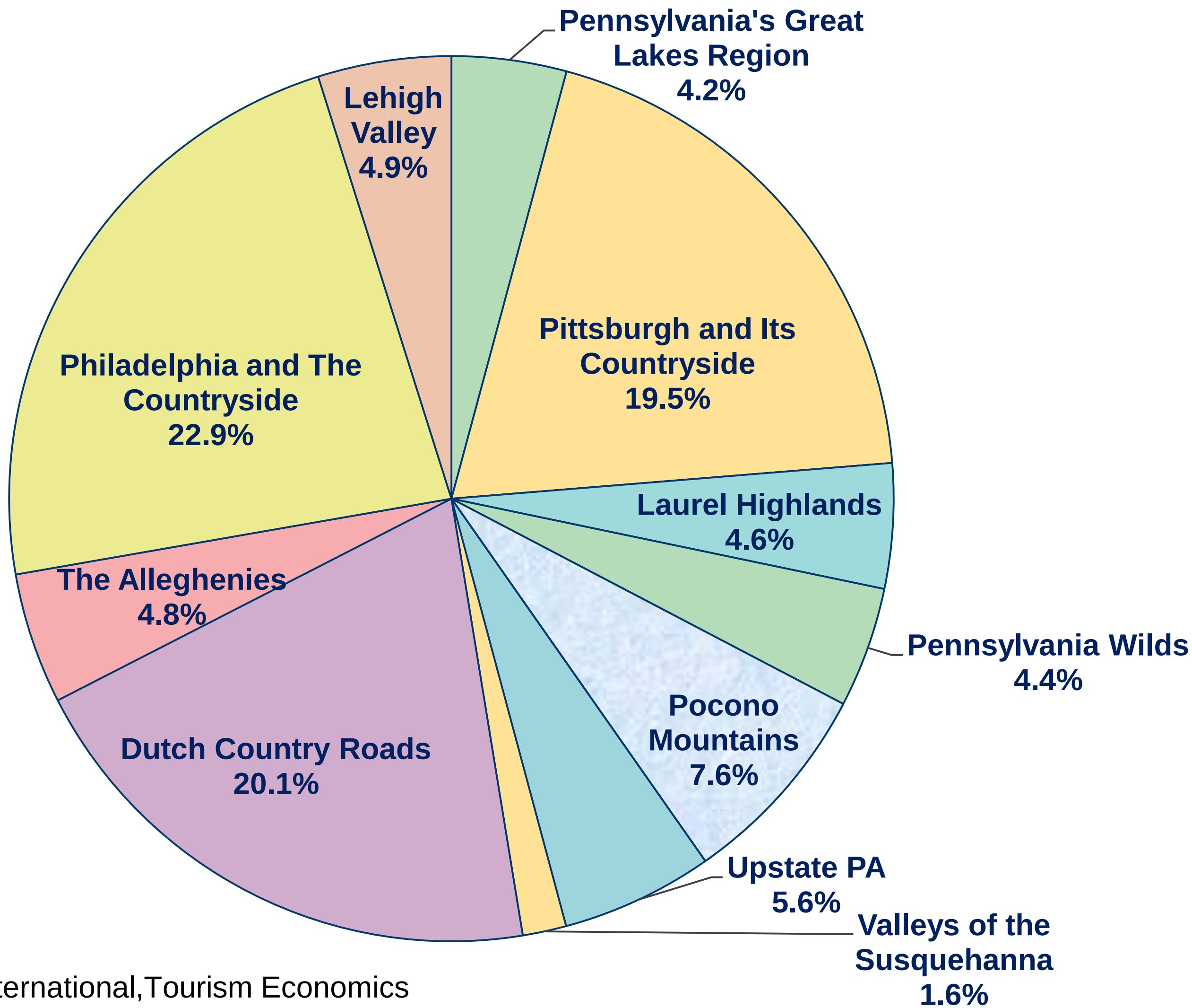
2013 Traveler Spending and Economic Impact By Region and County

TOURISM ECONOMICS
AN OXFORD ECONOMICS COMPANY

Regional Spending

Regional Spending Shares

Share of Total 2013 Visitor Spending in PA by Region

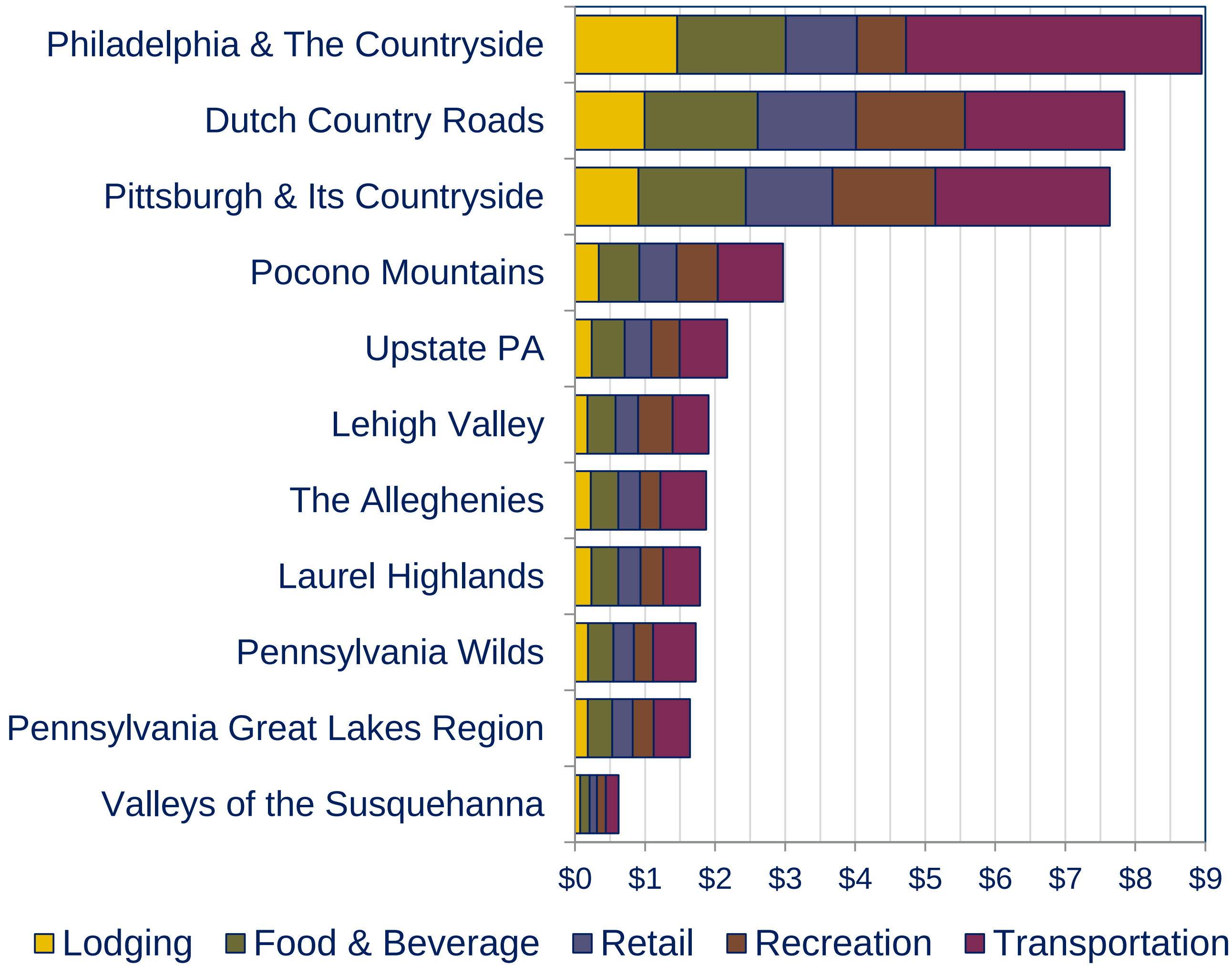


Source: Longwoods International,Tourism Economics

2012 Regional spending by category

- Travelers to the Lehigh Valley, Dutch Country Roads, Pocono Mountains, and Pittsburgh regions spent proportionally far more on recreation in 2013 than travelers to other regions.
- Travelers to the Philadelphia & Its Countryside region spent far more of their travel dollars on transportation than travelers to other regions.

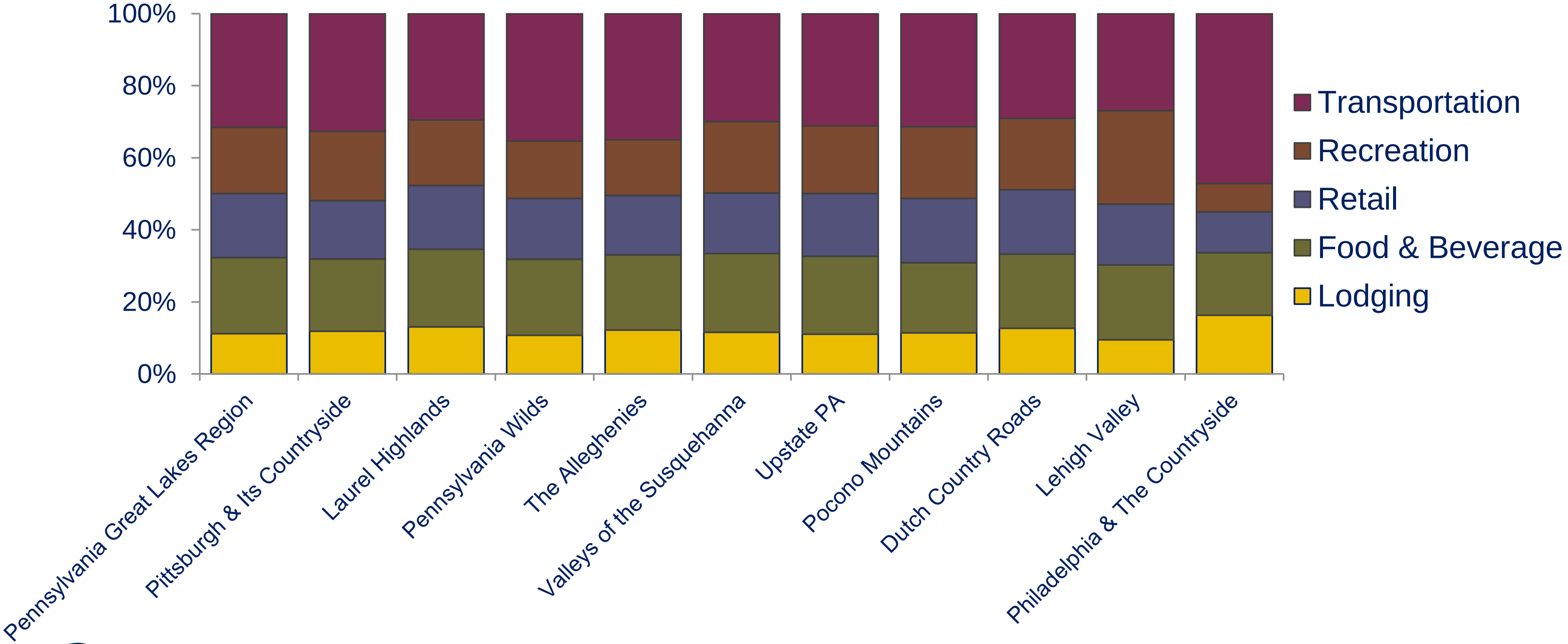
Traveler Spending by Category and Region
(in billions of US dollars)



PA spending by category -- % of region total

- Travelers to the Philadelphia & Its Countryside, Pennsylvania Wilds, and The Alleghenies regions spent proportionally far more of their travel dollars on transportation than travelers to PA's other tourism regions in 2013.

2013 Traveler Spending by Category and Region
Percent of Region Total



TOURISM ECONOMICS

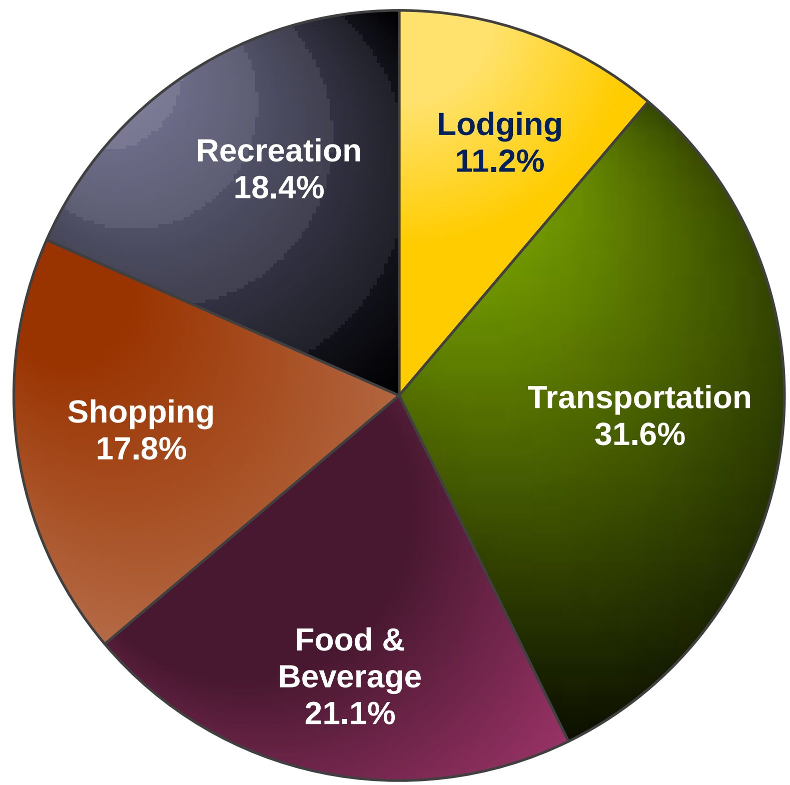
Total travel economy employment & intensity

- Travel Employment Intensity is a measure of each county's dependence on the travel industry for jobs. All PA tourism regions saw an increase in the measure in 2013.
- The Pocono Mountains region is by far the most dependent of all PA tourism regions on the travel industry as a job provider, with the Laurel Highlands region a distant second.
- The Philadelphia region has the highest number of travel-related jobs, but the region's highly diverse economic base makes the region the least dependent on travel.

Pennsylvania's Great Lakes Region

- Pennsylvania's Great Lakes region is comprised of Crawford, Erie, Mercer and Venango counties.
- Travelers spent nearly $1.64 billion in the region in 2013 – a 0.8% increase from 2012's spending level.
- As in 2012, the region had the 3rd highest proportion of its travel and tourism dollars spent on shopping among Pennsylvania's 11 tourism regions in 2013.

Pennsylvania's Great Lakes Region
2013 Spending by Category

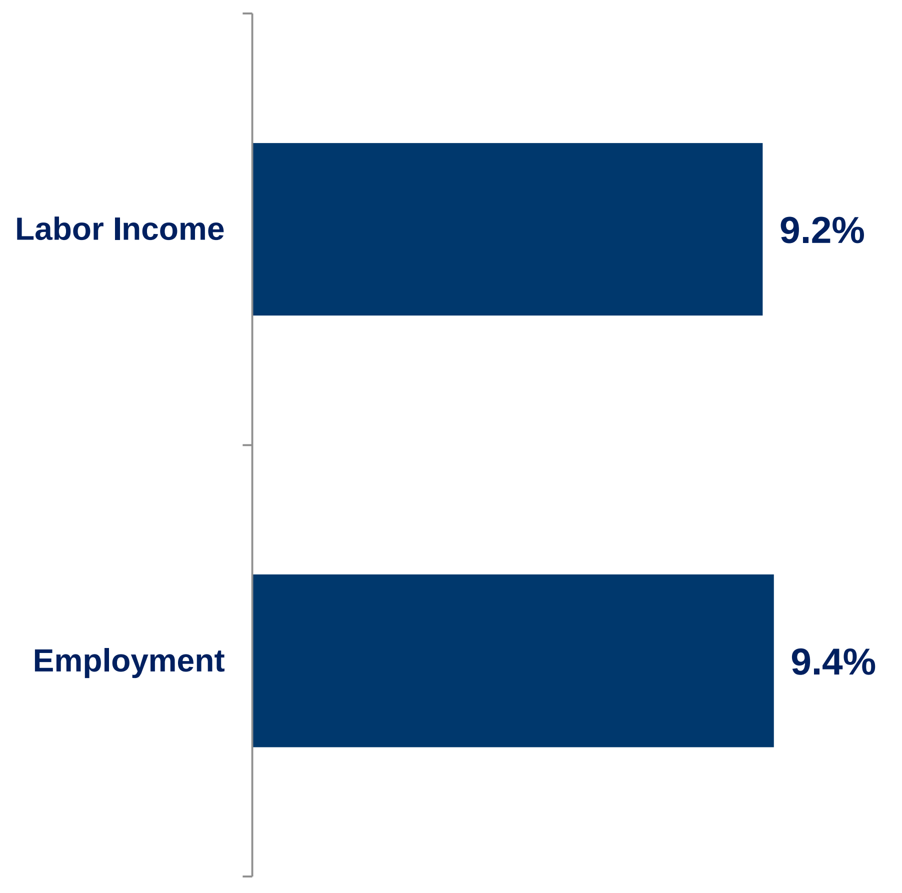


Source: Tourism Economics

Pennsylvania's Great Lakes Region

- The chart shows the travel economy's share (includes direct, indirect and induced impacts) of the region's total for both labor income and employment.
- The travel industry's labor income share for the region was 9.2% in 2013, up from 9.0% in 2012.
- The region ranked 9th in the number of travel-supported jobs among PA's 11 tourism regions in 2013, but ranked 5th in employment intensity.

Travel Industry Share of Regional Economy



PA's Great Lakes Region – Timelines

Tourism Industry Spending (Millions of dollars)									
County	2005	2006	2007	2008	2009	2010	2011	2012	2013
Crawford	259.7	260.0	258.4	274.9	219.7	241.5	250.8	260.3	265.8
Erie	726.9	733.7	778.8	876.0	741.2	829.4	897.4	930.7	924.8
Mercer	240.8	241.1	243.2	279.8	233.2	256.0	279.7	304.9	319.6
Venango	119.2	116.1	118.7	130.2	108.7	118.3	124.0	132.1	131.0
Great Lakes	1,346.6	1,350.9	1,399.0	1,560.8	1,302.7	1,445.2	1,551.8	1,628.1	1,641.2
Percent Change		0.3%	3.6%	11.6%	-16.5%	10.9%	7.4%	4.9%	0.8%

Tourism Industry Employment Impacts									
County	2005	2006	2007	2008	2009	2010	2011	2012	2013
Crawford	2,224	2,254	2,261	2,237	2,091	2,160	2,171	2,122	2,152
Erie	7,134	7,150	7,114	7,095	6,674	7,004	7,181	7,347	7,527
Mercer	2,574	2,571	2,537	2,513	2,343	2,417	2,485	2,557	2,618
Venango	1,108	1,146	1,171	1,191	1,113	1,138	1,153	1,143	1,159
Great Lakes	13,040	13,121	13,084	13,036	12,221	12,719	12,989	13,169	13,456
Percent Change		0.6%	-0.3%	-0.4%	-6.3%	4.1%	2.1%	1.4%	2.2%

PA's Great Lakes Region – 2012 & 2013 Traveler spending

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2013						
Crawford	18.4	59.6	48.3	43.2	96.3	265.8
Erie	112.2	192.3	156.8	188.4	275.1	924.8
Mercer	42.3	71.0	65.5	53.7	87.1	319.6
Venango	10.9	23.7	20.7	16.0	59.7	131.0
Great Lakes	183.8	346.7	291.3	301.3	518.1	1,641.2
Percent Change	-1.0%	2.2%	0.2%	1.6%	0.5%	0.8%
2012						
Crawford	18.5	58.8	47.6	41.4	94.0	260.3
Erie	115.8	189.4	159.0	187.9	278.7	930.7
Mercer	39.6	67.5	62.9	50.6	84.4	304.9
Venango	11.8	23.6	21.3	16.6	58.7	132.1
Great Lakes	185.7	339.3	290.8	296.6	515.8	1,628.1

PA’s Great Lakes Region – 2012 & 2013 TSA spending

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2013				
Crawford	265.8	1.0	12.1	278.9
Erie	924.8	5.8	42.0	972.7
Mercer	319.6	1.5	14.5	335.7
Venango	131.0	0.6	5.9	137.5
Great Lakes	1,641.2	9.0	74.6	1,724.8
Percent Change	0.8%	-0.5%	-1.1%	0.7%
2012				
Crawford	260.3	1.0	12.1	273.4
Erie	930.7	5.9	43.1	979.7
Mercer	304.9	1.5	14.1	320.6
Venango	132.1	0.6	6.1	138.8
Great Lakes	1,628.1	9.0	75.4	1,712.5

PA's Great Lakes Region – 2012 & 2013 Industry impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2013					
Crawford	265.8	2,152	49.6	13.8	11.9
Erie	924.8	7,527	188.1	53.0	43.5
Mercer	319.6	2,618	55.3	16.6	13.7
Venango	131.0	1,159	28.4	7.2	6.4
Great Lakes	1,641.2	13,456	321.4	90.7	75.5
Percent Change	0.8%	2.2%	3.4%	2.5%	2.2%
2012					
Crawford	260.3	2,122	48.2	13.6	11.6
Erie	930.7	7,347	181.5	51.7	42.8
Mercer	304.9	2,557	53.0	15.9	13.1
Venango	132.1	1,143	28.0	7.3	6.4
Great Lakes	1,628.1	13,169	310.7	88.4	73.9

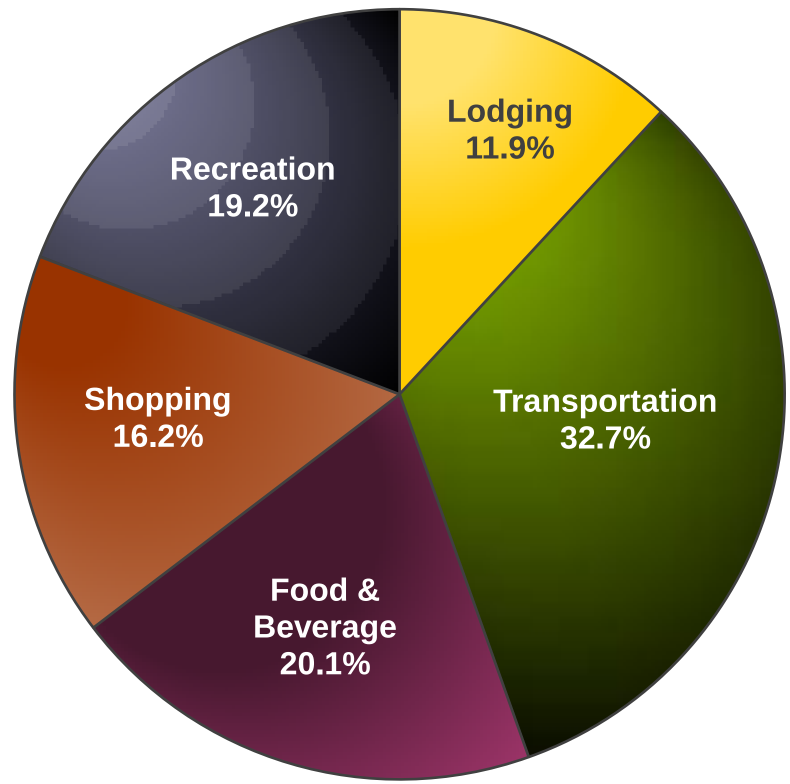
PA's Great Lakes Region – 2012 & 2013 Economy impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2013					
Crawford	278.9	3,398	104.9	24.5	23.9
Erie	972.7	11,562	374.6	91.4	87.7
Mercer	335.7	4,083	117.8	29.0	27.6
Venango	137.5	1,844	59.6	12.8	12.9
Great Lakes	1,724.8	20,887	656.8	157.7	152.1
Percent Change	0.7%	1.5%	2.1%	2.0%	2.3%
2012					
Crawford	273.4	3,370	103.3	24.0	23.4
Erie	979.7	11,366	366.2	89.9	86.1
Mercer	320.6	4,016	114.8	27.8	26.4
Venango	138.8	1,829	59.3	12.9	12.9
Great Lakes	1,712.5	20,582	643.6	154.6	148.7

Pittsburgh & Its Countryside

- Pittsburgh & Its Countryside region is comprised of the following eight counties: Allegheny, Armstrong, Beaver, Butler, Greene, Indiana, Lawrence, and Washington.
- Travelers spent more than $7.6 billion in the region in 2013 - a 1.4% increase from 2012. While this was the 5th strongest year-over-year rate of growth of PA's 11 tourism regions, the region had the second largest increase in traveler spending between 2008 and 2013.
- As in prior years, the region had the third highest level of traveler spending after Philadelphia and The Countryside and the Dutch Country Roads regions.

Pittsburgh and Its Countryside Region 2013 Spending by Category

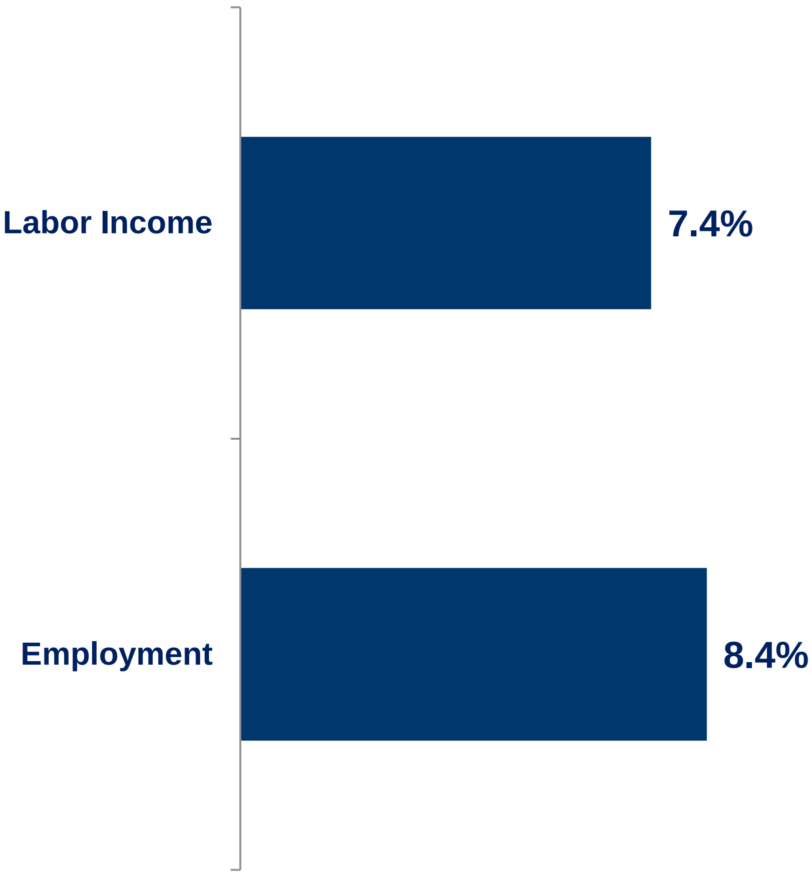


Source: Tourism Economics

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 7.4% in 2013, while the industry's share of the region's employment base was higher at 8.4%, with both showing increases from 2012.
- The region continued to have the 3rd highest number of travel-supported jobs of PA's 11 tourism regions and rank 7th in the industry's employment intensity in 2013.

Travel Industry Share of Regional Economy



Pittsburgh & Its Countryside - Timelines

Tourism Industry Spending (Millions of dollars)									
County	2005	2006	2007	2008	2009	2010	2011	2012	2013
Allegheny	4,010.2	4,096.5	4,360.9	4,979.8	4,354.6	4,828.1	5,231.2	5,494.0	5,570.1
Armstrong	67.1	68.3	71.2	75.3	58.6	71.3	84.0	89.8	91.4
Beaver	189.9	185.0	197.6	226.9	196.0	217.2	237.4	244.9	250.0
Butler	367.2	377.9	406.5	455.5	406.1	440.6	485.7	578.8	581.5
Greene	58.5	56.4	60.8	65.3	58.7	68.9	74.6	80.4	91.8
Indiana	129.5	124.7	135.3	152.6	144.5	154.2	169.7	184.3	179.0
Lawrence	89.0	92.0	95.0	101.4	83.7	98.6	113.4	118.9	118.1
Washington	404.7	415.0	451.2	497.1	482.3	582.7	668.4	740.7	754.7
Pittsburgh and Its Countryside	5,316.3	5,415.8	5,778.4	6,554.1	5,784.5	6,461.7	7,064.4	7,531.8	7,636.6
Percent Change		1.9%	6.7%	13.4%	-11.7%	11.7%	9.3%	6.6%	1.4%

Tourism Industry Employment Impacts									
County	2005	2006	2007	2008	2009	2010	2011	2012	2013
Allegheny	35,655	35,650	36,767	37,591	36,188	37,302	38,112	39,094	40,012
Armstrong	532	525	517	530	484	554	559	568	574
Beaver	2,121	2,106	2,125	2,109	1,977	1,965	1,975	1,997	2,051
Butler	3,624	3,708	3,789	3,739	3,664	3,740	3,828	3,941	4,001
Greene	391	400	410	417	419	479	479	483	486
Indiana	1,296	1,297	1,320	1,342	1,347	1,351	1,381	1,427	1,452
Lawrence	831	842	854	863	806	873	877	896	908
Washington	4,625	4,824	4,877	4,995	5,026	5,570	5,740	5,840	5,957
Pittsburgh and Its Countryside	49,075	49,353	50,658	51,586	49,911	51,834	52,952	54,246	55,439
Percent Change		0.6%	2.6%	1.8%	-3.2%	3.9%	2.2%	2.4%	2.2%

Pittsburgh & Its Countryside – 2012 & 2013 Traveler spending

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2013						
Allegheny	677.2	1,107.3	890.0	1,058.6	1,837.0	5,570.1
Armstrong	3.7	16.5	13.0	25.7	32.5	91.4
Beaver	17.0	52.7	41.7	39.9	98.7	250.0
Butler	74.0	123.9	102.2	93.8	187.6	581.5
Greene	13.2	20.2	15.1	14.3	29.0	91.8
Indiana	22.0	40.5	32.8	29.3	54.5	179.0
Lawrence	6.7	26.2	23.5	22.8	38.9	118.1
Washington	92.8	145.9	117.5	182.9	215.7	754.7
Pittsburgh and Its Countryside	906.6	1,533.0	1,235.9	1,467.2	2,493.9	7,636.6
Percent Change	-1.6%	3.2%	0.1%	2.6%	1.3%	1.4%
2012						
Allegheny	694.3	1,075.1	890.4	1,029.9	1,804.4	5,494.0
Armstrong	3.7	16.0	13.1	25.1	31.9	89.8
Beaver	16.9	50.7	41.5	38.8	97.0	244.9
Butler	72.5	118.1	101.1	90.8	196.3	578.8
Greene	10.6	17.5	13.5	12.4	26.4	80.4
Indiana	24.0	40.9	34.1	30.2	55.1	184.3
Lawrence	7.3	25.7	24.1	22.4	39.4	118.9
Washington	91.8	140.9	117.0	180.2	210.9	740.7
Pittsburgh and Its Countryside	921.1	1,484.9	1,234.8	1,429.7	2,461.3	7,531.8

Pittsburgh & Its Countryside – 2012 & 2013 TSA spending

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2013				
Allegheny	5,570.1	41.7	253.0	5,864.9
Armstrong	91.4	0.3	4.2	95.9
Beaver	250.0	1.0	11.4	262.3
Butler	581.5	2.7	26.4	610.7
Greene	91.8	0.4	4.2	96.4
Indiana	179.0	0.9	8.1	188.0
Lawrence	118.1	0.4	5.4	123.9
Washington	754.7	3.4	34.3	792.4
Pittsburgh and Its Countryside	7,636.6	51.0	346.9	8,034.5
Percent Change	1.4%	-0.2%	-0.5%	1.3%
2012				
Allegheny	5,494.0	41.8	254.4	5,790.2
Armstrong	89.8	0.3	4.2	94.3
Beaver	244.9	1.0	11.3	257.3
Butler	578.8	2.8	26.8	608.3
Greene	80.4	0.4	3.7	84.5
Indiana	184.3	0.9	8.5	193.7
Lawrence	118.9	0.4	5.5	124.9
Washington	740.7	3.4	34.3	778.5
Pittsburgh and Its Countryside	7,531.8	51.1	348.8	7,931.7

Pittsburgh & Its Countryside – 2012 & 2013 Industry impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2013					
Allegheny	5,570.1	40,012	1,383.4	348.8	296.7
Armstrong	91.4	574	13.4	4.4	3.6
Beaver	250.0	2,051	55.4	13.9	12.4
Butler	581.5	4,001	102.4	30.5	25.2
Greene	91.8	486	11.1	4.3	3.3
Indiana	179.0	1,452	31.7	9.4	7.8
Lawrence	118.1	908	21.9	6.2	5.3
Washington	754.7	5,957	167.1	42.7	37.4
Pittsburgh and Its Countryside	7,636.6	55,439	1,786.4	460.1	391.5
Percent Change	1.4%	2.2%	5.2%	2.5%	3.6%
2012					
Allegheny	5,494.0	39,094	1,307.1	339.5	285.2
Armstrong	89.8	568	13.0	4.3	3.5
Beaver	244.9	1,997	53.3	13.6	12.0
Butler	578.8	3,941	98.2	29.9	24.6
Greene	80.4	483	10.5	3.9	3.0
Indiana	184.3	1,427	30.2	9.5	7.7
Lawrence	118.9	896	21.0	6.1	5.2
Washington	740.7	5,840	164.6	42.2	36.8
Pittsburgh and Its Countryside	7,531.8	54,246	1,698.0	449.0	378.0

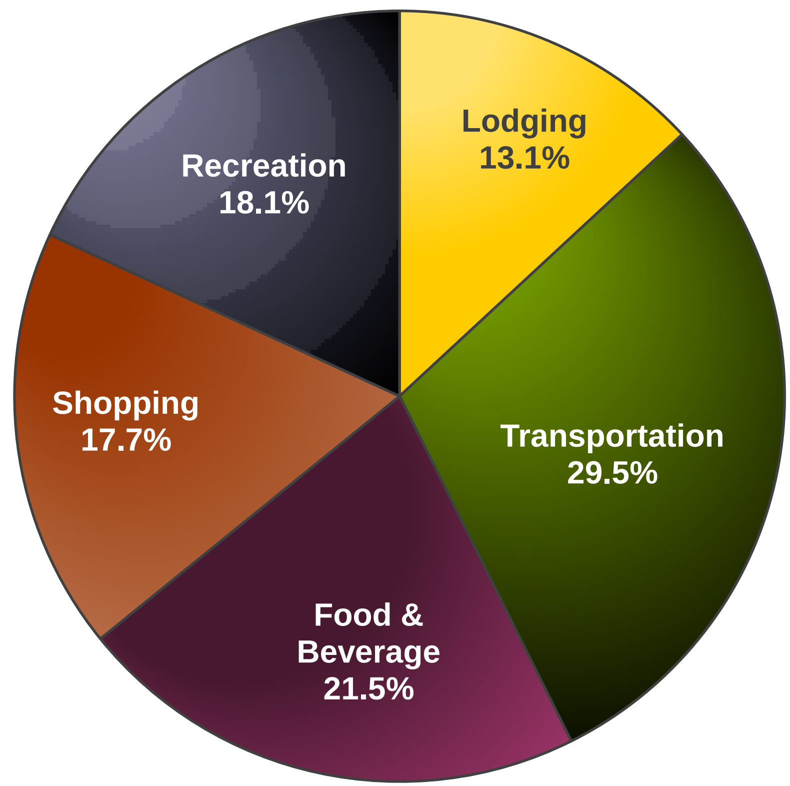
Pittsburgh & Its Countryside – 2012 & 2013 Economy impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2013					
Allegheny	5,864.9	59,715	2,491.4	600.2	598.2
Armstrong	95.9	1,139	38.7	7.7	7.2
Beaver	262.3	3,562	126.6	24.6	25.0
Butler	610.7	6,277	208.6	53.3	50.7
Greene	96.4	867	27.9	7.5	6.6
Indiana	188.0	2,382	72.1	16.4	15.6
Lawrence	123.9	1,672	56.4	10.9	10.6
Washington	792.4	9,049	319.5	75.1	75.4
Pittsburgh and Its Countryside	8,034.5	84,664	3,341.1	795.7	789.2
Percent Change	1.3%	1.5%	3.7%	2.4%	3.6%
2012					
Allegheny	5,790.2	58,727	2,388.0	584.3	575.0
Armstrong	94.3	1,134	38.2	7.6	7.0
Beaver	257.3	3,503	124.1	24.1	24.2
Butler	608.3	6,219	203.1	52.4	49.4
Greene	84.5	866	27.2	6.7	6.0
Indiana	193.7	2,357	70.1	16.5	15.4
Lawrence	124.9	1,661	55.2	10.8	10.4
Washington	778.5	8,927	317.2	74.2	74.2
Pittsburgh and Its Countryside	7,931.7	83,394	3,223.1	776.8	761.7

Laurel Highlands

- The Laurel Highlands in southwestern PA is comprised of the following counties: Fayette, Somerset, and Westmorland.
- Travelers spent nearly $1.8 billion in the Laurel Highlands region in 2013 – a 0.9% increase from 2012.
- The region had the second highest proportion of travelers' dollars going towards lodging and third highest to food & beverages among the state's 11 tourism regions, and the third lowest share spent on transportation.

Laurel Highlands Region
2013 Spending by Category

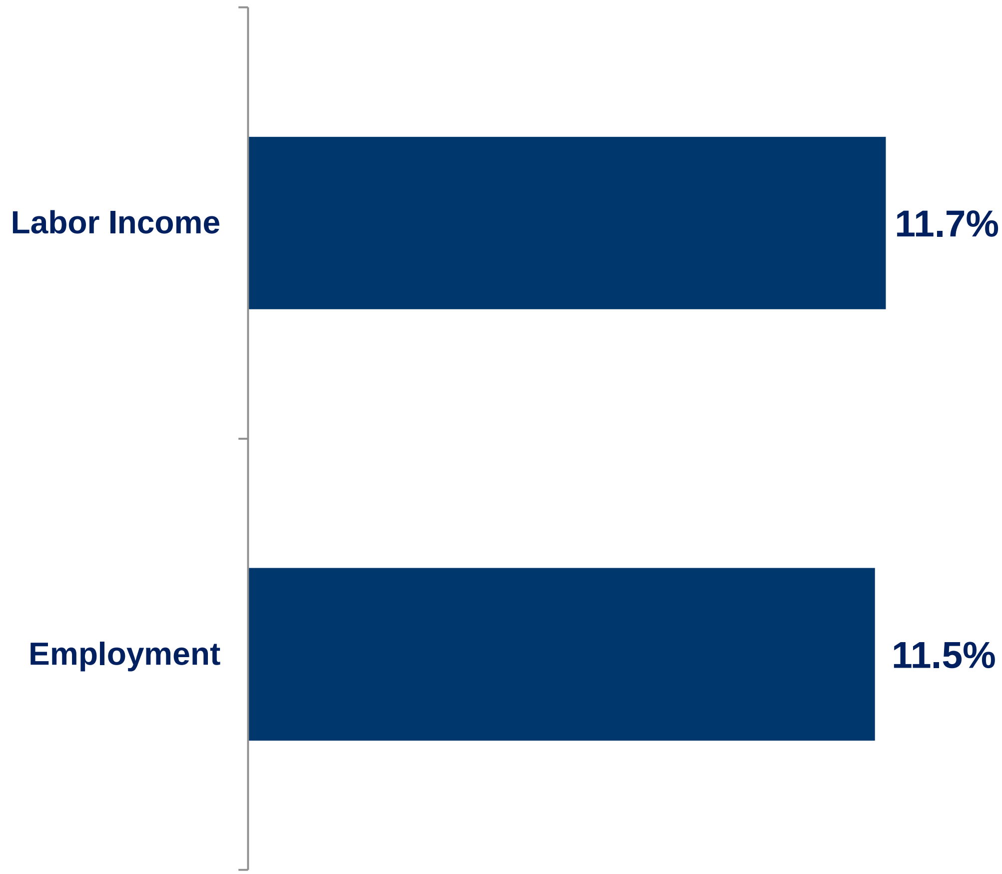


Source: Tourism Economics

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 11.7% in 2013 – a half percentage point higher than in 2012
- The travel industry supported 11.5% of the region's total job count – up from 11.1% in the two prior years and the second highest level of PA's 11 tourism regions, while ranking 6th in the actual number of total travel-supported jobs.

Travel Industry Share of Regional Economy



Laurel Highlands – Timelines

Tourism Industry Spending (Millions of dollars)									
County	2005	2006	2007	2008	2009	2010	2011	2012	2013
Fayette	543.4	562.1	563.6	618.4	538.2	595.7	636.0	643.9	661.9
Somerset	322.0	309.6	325.2	357.2	306.9	330.1	371.0	378.7	379.9
Westmoreland	609.9	621.0	623.5	706.4	587.6	651.6	724.7	745.9	742.3
Laurel Highlands	1,475.3	1,492.8	1,512.2	1,682.0	1,432.6	1,577.3	1,731.7	1,768.5	1,784.2
Percent Change		1.2%	1.3%	11.2%	-14.8%	10.1%	9.8%	2.1%	0.9%

Tourism Industry Employment Impacts									
County	2005	2006	2007	2008	2009	2010	2011	2012	2013
Fayette	5,275	5,273	5,272	5,241	5,047	5,219	5,295	5,417	5,818
Somerset	3,466	3,449	3,431	3,449	3,255	3,234	3,257	3,193	3,295
Westmoreland	5,512	5,510	5,539	5,582	5,243	5,369	5,476	5,632	5,723
Laurel Highlands	14,253	14,232	14,242	14,272	13,544	13,822	14,028	14,242	14,836
Percent Change		-0.1%	0.1%	0.2%	-5.1%	2.1%	1.5%	1.5%	4.2%

Laurel Highlands – 2012 & 2013 Traveler spending

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2013						
Fayette	109.6	143.5	114.0	123.9	170.9	661.9
Somerset	50.7	82.6	62.7	66.6	117.3	379.9
Westmoreland	73.3	158.1	139.6	132.7	238.7	742.3
Laurel Highlands	233.7	384.2	316.2	323.2	526.9	1,784.2
Percent Change	-0.8%	2.5%	-0.3%	2.5%	0.3%	0.9%
2012						
Fayette	107.8	137.8	112.6	116.8	168.9	643.9
Somerset	51.7	80.8	63.1	65.6	117.5	378.7
Westmoreland	76.2	156.3	141.7	133.0	238.7	745.9
Laurel Highlands	235.6	375.0	317.3	315.4	525.2	1,768.5

Laurel Highlands – 2012 & 2013 TSA spending

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2013				
Fayette	661.9	2.9	30.1	694.9
Somerset	379.9	1.9	17.3	399.1
Westmoreland	742.3	3.3	33.7	779.3
Laurel Highlands	1,784.2	8.0	81.1	1,873.3
Percent Change	0.9%	-0.6%	-1.0%	0.8%
2012				
Fayette	643.9	2.9	29.8	676.6
Somerset	378.7	1.9	17.5	398.1
Westmoreland	745.9	3.3	34.5	783.7
Laurel Highlands	1,768.5	8.1	81.9	1,858.5

Laurel Highlands – 2012 & 2013 Industry impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2013					
Fayette	661.9	5,818	155.5	38.0	34.0
Somerset	379.9	3,295	87.6	21.9	19.3
Westmoreland	742.3	5,723	131.3	38.3	32.2
Laurel Highlands	1,784.2	14,836	374.3	98.1	85.5
Percent Change	0.9%	4.2%	7.7%	3.0%	4.8%
2012					
Fayette	643.9	5,417	136.9	35.6	31.2
Somerset	378.7	3,193	83.3	21.5	18.7
Westmoreland	745.9	5,632	127.2	38.2	31.7
Laurel Highlands	1,768.5	14,242	347.4	95.3	81.6

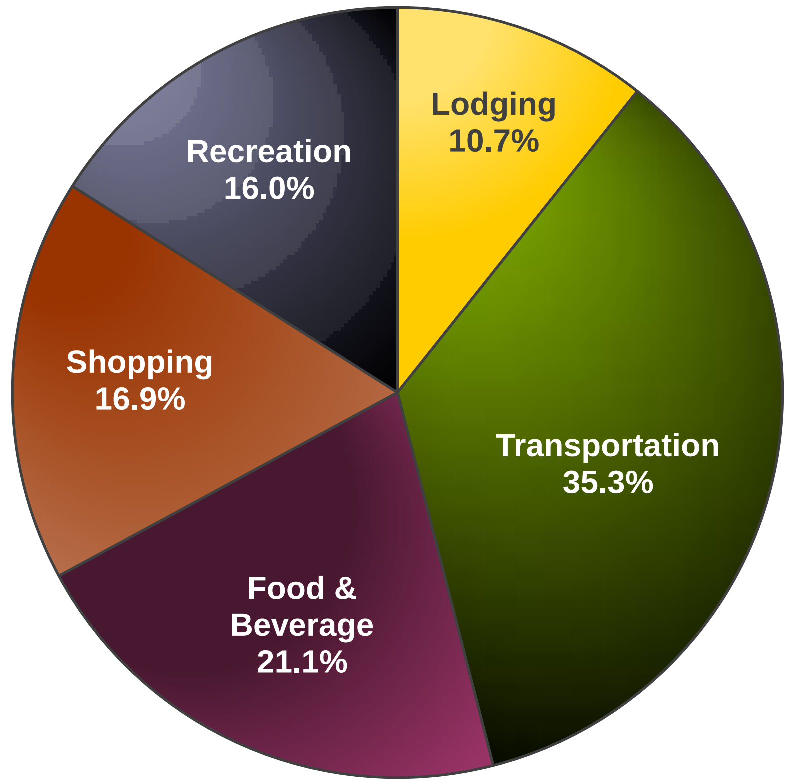
Laurel Highlands – 2012 & 2013 Economy impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2013					
Fayette	694.9	8,292	276.0	67.1	68.6
Somerset	399.1	4,846	162.2	38.4	38.9
Westmoreland	779.3	9,558	301.2	67.5	64.8
Laurel Highlands	1,873.3	22,695	739.5	173.0	172.3
Percent Change	0.8%	3.1%	5.3%	3.0%	4.9%
2012					
Fayette	676.6	7,808	249.2	63.0	62.8
Somerset	398.1	4,731	156.5	37.8	37.7
Westmoreland	783.7	9,468	296.3	67.2	63.8
Laurel Highlands	1,858.5	22,008	702.0	168.0	164.3

Pennsylvania Wilds

- The Pennsylvania Wilds region is comprised of the following northern tier counties: Cameron, Clarion, Clearfield, Clinton, Elk, Forest, Jefferson, Lycoming, McKean, Potter, Tioga, and Warren.
- Travelers spent more than $1.7 billion in the Pennsylvania Wilds region in 2013 – a 0.3% increase from 2012. While this was the second lowest year-over-year rate of increase of PA’s 11 tourism regions, the Pennsylvania Wilds registered the strongest rate of growth between 2008 and 2013.

Pennsylvania Wilds Region 2013 Spending by Category

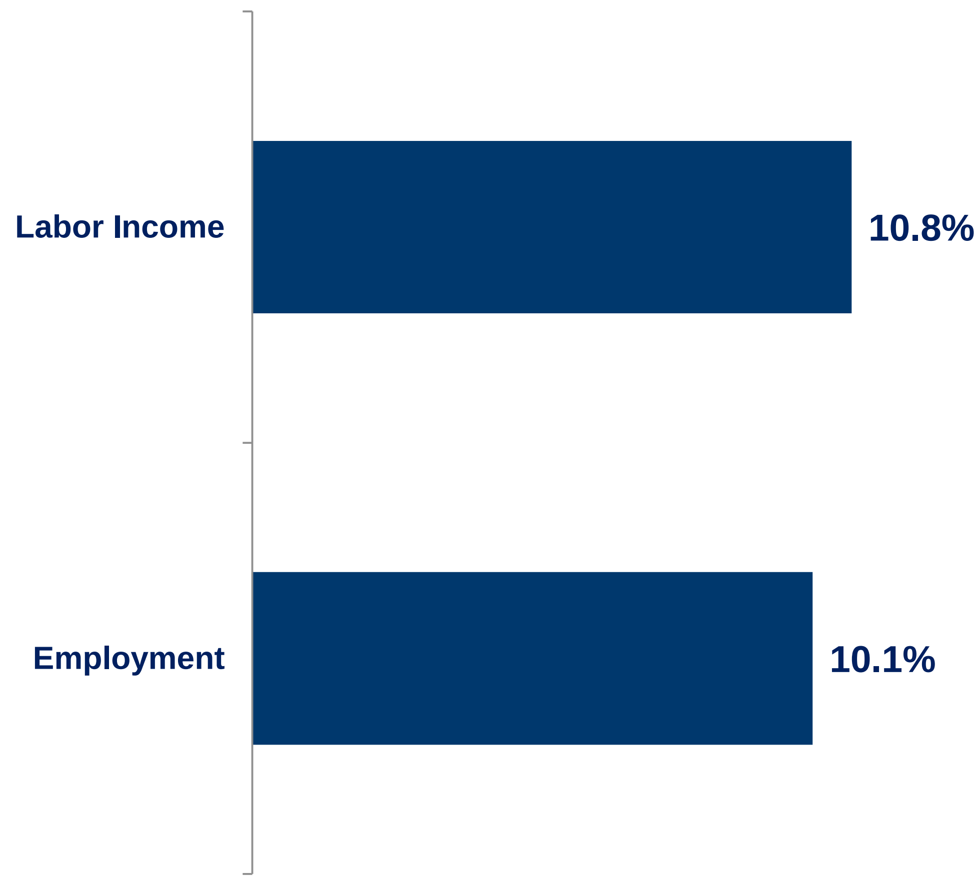


Source: Tourism Economics

Pennsylvania Wilds

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- The labor income share for the Pennsylvania Wilds region was 10.8% in 2013, above the industry's employment share of 10.1% - with both measures up from 2012.
- The region ranked 10th among PA's 11 tourism regions in the number of travel-supported jobs, but continued to rank 3rd in employment intensity in 2013.

Travel Industry Share of Regional Economy



TOURISM ECONOMICS

Pennsylvania Wilds - Timelines

Tourism Industry Spending (Millions of dollars)									
County	2005	2006	2007	2008	2009	2010	2011	2012	2013
Cameron	7.8	7.9	8.4	9.3	7.8	9.0	9.5	9.6	9.6
Clarion	90.1	94.3	101.7	112.0	93.5	108.1	112.5	118.6	121.4
Clearfield	222.6	227.5	233.5	250.3	212.3	248.9	261.8	264.3	265.5
Clinton	109.8	108.9	111.1	123.2	108.0	136.6	151.4	153.9	150.6
Elk	47.9	47.8	51.5	57.9	47.2	52.3	61.4	66.1	66.0
Forest	18.2	18.6	19.7	21.2	18.5	20.4	23.7	22.6	23.3
Jefferson	93.0	90.3	92.6	97.8	82.2	102.9	109.9	113.6	115.2
Lycoming	231.2	241.5	255.6	293.1	269.3	308.7	384.4	398.2	405.5
McKean	119.6	120.0	126.1	138.9	123.2	158.9	164.0	173.4	174.5
Potter	24.6	25.1	26.6	29.3	27.0	30.1	36.6	34.3	34.5
Tioga	144.1	139.5	149.1	159.1	139.5	171.2	192.3	193.4	187.5
Warren	121.5	127.9	137.0	157.8	137.7	149.3	162.5	169.4	169.5
Pennsylvania Wilds	1,230.4	1,249.3	1,312.9	1,450.1	1,266.2	1,496.4	1,670.0	1,717.3	1,723.1
Percent Change		1.5%	5.1%	10.4%	-12.7%	18.2%	11.6%	2.8%	0.3%

Tourism Industry Employment Impacts									
County	2005	2006	2007	2008	2009	2010	2011	2012	2013
Cameron	75	76	78	79	73	74	75	75	76
Clarion	956	952	947	963	899	972	993	1,022	1,048
Clearfield	1,499	1,553	1,594	1,623	1,594	1,770	1,793	1,775	1,780
Clinton	805	802	818	835	798	952	990	993	1,041
Elk	487	494	495	496	462	488	509	531	555
Forest	124	125	129	131	124	135	136	137	137
Jefferson	699	714	719	732	683	747	762	785	805
Lycoming	2,504	2,497	2,553	2,573	2,538	2,707	2,790	2,901	2,978
McKean	999	988	1,008	997	943	1,112	1,130	1,114	1,139
Potter	186	188	193	197	195	206	216	229	241
Tioga	1,272	1,260	1,250	1,253	1,215	1,387	1,451	1,462	1,532
Warren	1,128	1,123	1,142	1,154	1,123	1,133	1,149	1,120	1,142
Pennsylvania Wilds	10,733	10,772	10,926	11,032	10,648	11,684	11,993	12,142	12,473
Percent Change		0.4%	1.4%	1.0%	-3.5%	9.7%	2.6%	1.2%	2.7%

Pennsylvania Wilds – 2013 Traveler spending

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2013						
Cameron	0.5	1.7	1.7	2.4	3.2	9.6
Clarion	16.0	27.1	22.0	20.4	35.9	121.4
Clearfield	27.2	55.4	48.1	42.9	91.9	265.5
Clinton	14.7	32.5	23.7	25.5	54.2	150.6
Elk	7.1	16.1	12.7	9.8	20.3	66.0
Forest	3.2	4.8	4.8	4.1	6.4	23.3
Jefferson	9.2	21.0	17.0	21.9	46.1	115.2
Lycoming	56.3	92.4	69.9	55.4	131.5	405.5
McKean	17.1	33.6	26.4	27.3	70.2	174.5
Potter	4.6	7.2	5.8	5.3	11.6	34.5
Tioga	20.7	38.8	33.0	32.2	62.7	187.5
Warren	8.3	32.6	25.9	28.0	74.7	169.5
Pennsylvania Wilds	185.0	363.1	290.9	275.3	608.7	1,723.1
Percent Change	-4.0%	1.8%	-1.5%	0.9%	1.5%	0.3%

Pennsylvania Wilds – 2012 Traveler spending

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

Pennsylvania Wilds – 2013 TSA spending

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2013				
Cameron	9.6	0.0	0.4	10.1
Clarion	121.4	0.6	5.5	127.5
Clearfield	265.5	1.3	12.1	278.8
Clinton	150.6	0.7	6.8	158.1
Elk	66.0	0.3	3.0	69.3
Forest	23.3	0.1	1.1	24.5
Jefferson	115.2	0.5	5.2	120.9
Lycoming	405.5	1.9	18.4	425.9
McKean	174.5	0.8	7.9	183.3
Potter	34.5	0.2	1.6	36.2
Tioga	187.5	0.9	8.5	197.0
Warren	169.5	0.6	7.7	177.8
Pennsylvania Wilds	1,723.1	8.0	78.3	1,809.4
Percent Change	0.3%	-0.9%	-1.6%	0.2%

Pennsylvania Wilds – 2012 TSA Spending

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

Pennsylvania Wilds – 2013 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	121.4	1,048	23.4	6.5	5.5
Clearfield	265.5	1,780	47.0	13.8	11.5
Clinton	150.6	1,041	27.1	7.8	6.6
Elk	66.0	555	10.7	3.3	2.7
Forest	23.3	137	3.7	1.2	1.0
Jefferson	115.2	805	22.3	6.1	5.3
Lycoming	405.5	2,978	76.8	21.9	18.3
McKean	174.5	1,139	29.2	8.8	7.4
Potter	34.5	241	5.8	1.8	1.5
Tioga	187.5	1,532	38.7	10.2	8.9
Warren	169.5	1,142	26.3	8.3	6.9
Pennsylvania Wilds	1,723.1	12,473	312.5	90.2	75.9
Percent Change	0.3%	2.7%	4.1%	1.2%	2.4%

Pennsylvania Wilds – 2012 Industry impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2012					
Cameron	9.6	75	1.4	0.5	0.4
Clarion	118.6	1,022	22.9	6.4	5.4
Clearfield	264.3	1,775	45.8	13.7	11.3
Clinton	153.9	993	25.8	7.9	6.5
Elk	66.1	531	10.1	3.3	2.6
Forest	22.6	137	3.7	1.1	0.9
Jefferson	113.6	785	21.6	6.0	5.1
Lycoming	398.2	2,901	73.7	21.2	17.8
McKean	173.4	1,114	27.7	8.7	7.1
Potter	34.3	229	5.7	1.8	1.4
Tioga	193.4	1,462	36.4	10.4	8.7
Warren	169.4	1,120	25.5	8.2	6.7
Pennsylvania Wilds	1,717.3	12,142	300.2	89.1	74.1

Pennsylvania Wilds – 2013 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	127.5	1,637	49.2	11.5	11.2
Clearfield	278.8	2,863	98.1	24.2	23.2
Clinton	158.1	1,630	54.8	13.8	13.3
Elk	69.3	909	25.4	5.8	5.5
Forest	24.5	230	8.1	2.1	1.9
Jefferson	120.9	1,354	48.6	10.8	10.6
Lycoming	425.9	4,613	153.5	38.2	36.8
McKean	183.3	1,761	58.3	15.5	14.8
Potter	36.2	408	13.3	3.1	2.9
Tioga	197.0	2,271	73.3	18.1	17.9
Warren	177.8	1,797	55.4	14.6	13.8
Pennsylvania Wilds	1,809.4	19,602	641.6	158.4	152.7
Percent Change	0.2%	1.9%	2.5%	1.2%	2.4%

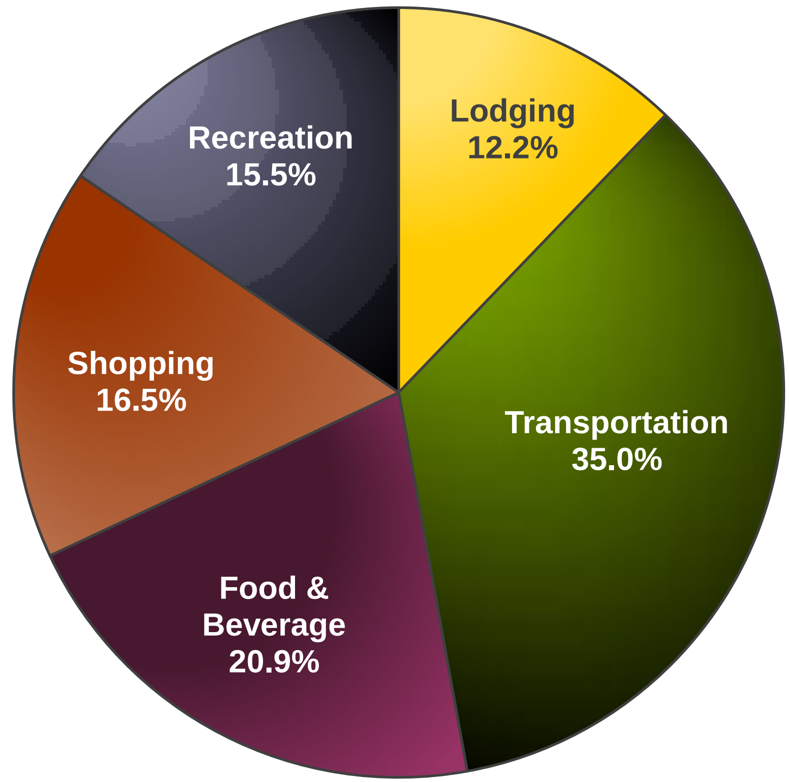
Pennsylvania Wilds – 2012 Economy impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2012					
Cameron	10.1	128	3.6	0.8	0.8
Clarion	124.7	1,609	48.7	11.2	10.9
Clearfield	277.8	2,864	96.7	24.1	22.8
Clinton	161.7	1,574	53.1	13.8	13.0
Elk	69.5	882	24.5	5.7	5.3
Forest	23.7	230	8.1	2.0	1.9
Jefferson	119.4	1,332	47.7	10.6	10.3
Lycoming	418.5	4,528	149.5	37.2	35.7
McKean	182.2	1,734	56.2	15.2	14.3
Potter	36.1	393	13.2	3.1	2.9
Tioga	203.3	2,189	70.1	18.2	17.5
Warren	177.9	1,774	54.3	14.5	13.5
Pennsylvania Wilds	1,804.9	19,237	625.7	156.5	149.1

The Alleghenies

- The Alleghenies is comprised of the following counties: Bedford, Blair, Cambria, Centre, Fulton, Huntingdon, Juniata, and Mifflin.
- Travelers spent close to $1.9 billion in The Alleghenies region in 2013 – a 2.8% increase from 2012.
- Visitors to the region continued to spend a relatively high percentage of their travel dollars on transportation and lodging with the region ranking 3rd and 4th, respectively, in the proportion of traveler dollars spent on these categories, but was among the lowest for recreation in 2013.

The Alleghenies Region
2013 Spending by Category

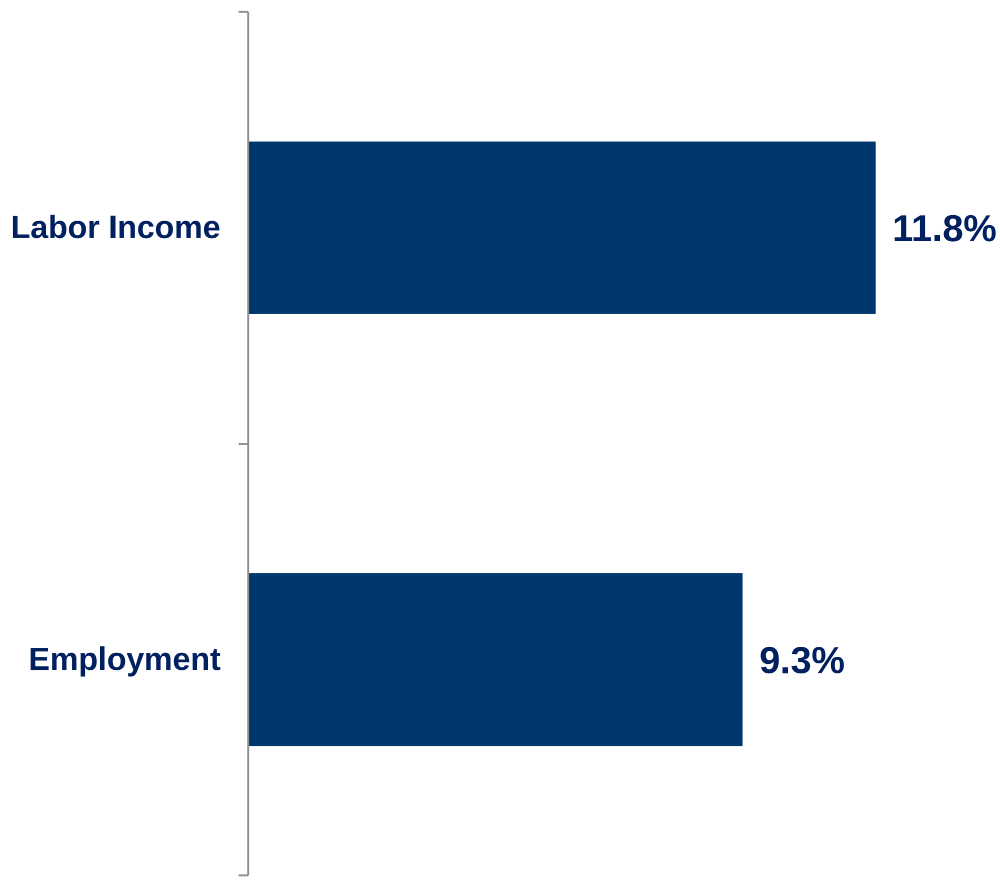


Source: Tourism Economics

The Allegheines

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- The travel-related labor income share for The Alleghenies region was 11.8% in 2013 – the second highest share of PA's 11 tourism regions and well above the region's travel industry employment share of 9.3%.
- The region dropped from 5th to 6th among PA's 11 tourism regions in the travel industry share of regional employment in 2013.

Travel Industry Share of Regional Economy



The Allegheniies – Timelines

Tourism Industry Spending (Millions of dollars)									
County	2005	2006	2007	2008	2009	2010	2011	2012	2013
Bedford	244.2	243.5	259.6	286.0	239.0	263.0	274.7	280.2	282.6
Blair	257.8	260.4	278.1	296.8	249.3	271.2	295.3	307.4	309.5
Cambria	235.2	232.3	244.3	280.9	238.5	257.6	290.5	303.4	301.1
Centre	498.7	511.2	531.4	616.4	545.6	588.7	649.3	654.3	693.0
Fulton	18.8	19.2	20.4	22.4	17.4	19.3	21.7	23.7	23.5
Huntingdon	129.5	125.7	135.3	146.6	129.1	144.1	153.1	162.8	161.8
Juniata	28.0	28.6	30.3	33.4	28.5	31.0	34.8	36.3	36.8
Mifflin	57.6	58.4	60.8	67.0	54.4	58.9	62.8	63.5	64.9
The Alleghenies	1,469.8	1,479.2	1,560.1	1,749.6	1,501.9	1,633.9	1,782.3	1,831.6	1,873.3
Percent Change		0.6%	5.5%	12.1%	-14.2%	8.8%	9.1%	2.8%	2.3%

Tourism Industry Employment Impacts									
County	2005	2006	2007	2008	2009	2010	2011	2012	2013
Bedford	1,993	2,044	2,113	2,151	1,977	2,026	2,015	1,967	1,983
Blair	2,389	2,449	2,512	2,582	2,446	2,499	2,544	2,554	2,611
Cambria	2,190	2,173	2,155	2,109	2,021	2,005	2,021	2,064	2,056
Centre	4,701	4,635	4,657	4,782	4,641	4,705	4,765	4,835	4,930
Fulton	146	148	152	154	143	152	152	154	155
Huntingdon	1,168	1,209	1,224	1,244	1,221	1,273	1,308	1,292	1,331
Juniata	237	240	247	251	239	218	219	222	223
Mifflin	577	588	599	610	567	583	589	598	606
The Alleghenies	13,400	13,486	13,658	13,883	13,254	13,460	13,614	13,687	13,895
Percent Change		0.6%	1.3%	1.6%	-4.5%	1.6%	1.1%	0.5%	1.5%

The Alleghenies – 2012 & 2013 Traveler spending

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2013						
Bedford	39.9	53.5	42.9	43.4	102.8	282.6
Blair	29.2	63.6	53.8	48.9	114.1	309.5
Cambria	22.7	58.1	47.9	48.0	124.5	301.1
Centre	114.0	151.6	116.0	99.3	212.1	693.0
Fulton	1.9	4.7	4.0	4.7	8.2	23.5
Huntingdon	13.0	35.4	26.5	29.7	57.1	161.8
Juniata	1.8	8.1	6.1	7.0	13.8	36.8
Mifflin	5.6	16.4	11.8	8.6	22.6	64.9
The Alleghenies	228.0	391.5	309.1	289.5	655.2	1,873.3
Percent Change	0.0%	2.7%	-0.2%	1.5%	4.4%	2.3%
2012						
Bedford	41.0	53.5	43.5	43.1	99.0	280.2
Blair	29.5	62.0	53.9	48.9	113.0	307.4
Cambria	24.5	58.1	49.0	48.4	123.4	303.4
Centre	111.0	145.1	114.5	94.9	188.9	654.3
Fulton	1.8	4.6	4.0	4.8	8.5	23.7
Huntingdon	13.0	34.3	27.1	29.9	58.5	162.8
Juniata	1.8	7.8	6.1	6.8	13.8	36.3
Mifflin	5.4	15.7	11.7	8.3	22.5	63.5
The Alleghenies	228.1	381.0	309.8	285.2	627.5	1,831.6

The Alleghenies – 2012 & 2013 TSA Spending

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2013				
Bedford	282.6	1.2	12.8	296.7
Blair	309.5	1.4	14.1	325.0
Cambria	301.1	1.3	13.7	316.1
Centre	693.0	3.6	31.5	728.1
Fulton	23.5	0.1	1.1	24.7
Huntingdon	161.8	0.6	7.4	169.7
Juniata	36.8	0.1	1.7	38.6
Mifflin	64.9	0.3	2.9	68.1
The Alleghenies	1,873.3	8.5	85.1	1,967.0
Percent Change	2.3%	0.3%	0.3%	2.2%
2012				
Bedford	280.2	1.2	13.0	294.4
Blair	307.4	1.4	14.2	323.0
Cambria	303.4	1.3	14.1	318.8
Centre	654.3	3.5	30.3	688.1
Fulton	23.7	0.1	1.1	24.9
Huntingdon	162.8	0.6	7.5	170.9
Juniata	36.3	0.1	1.7	38.1
Mifflin	63.5	0.3	2.9	66.7
The Alleghenies	1,831.6	8.5	84.8	1,924.9

The Alleghenies – 2012 & 2013 Industry impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2013					
Bedford	282.6	1,983	53.7	15.0	12.8
Blair	309.5	2,611	70.8	17.6	15.7
Cambria	301.1	2,056	64.7	16.6	14.7
Centre	693.0	4,930	136.6	37.8	32.0
Fulton	23.5	155	3.6	1.1	0.9
Huntingdon	161.8	1,331	32.4	8.8	7.5
Juniata	36.8	223	4.6	1.7	1.3
Mifflin	64.9	606	13.7	3.5	3.1
The Alleghenies	1,873.3	13,895.2	380.2	102.1	88.1
Percent Change	2.3%	1.5%	3.6%	2.4%	2.9%
2012					
Bedford	280.2	1,967	51.9	14.7	12.5
Blair	307.4	2,554	69.2	17.5	15.4
Cambria	303.4	2,064	63.6	16.7	14.6
Centre	654.3	4,835	130.0	36.0	30.4
Fulton	23.7	154	3.7	1.1	1.0
Huntingdon	162.8	1,292	30.9	8.6	7.4
Juniata	36.3	222	4.6	1.7	1.3
Mifflin	63.5	598	13.2	3.5	3.0
The Alleghenies	1,831.6	13,686.5	367.2	99.7	85.6

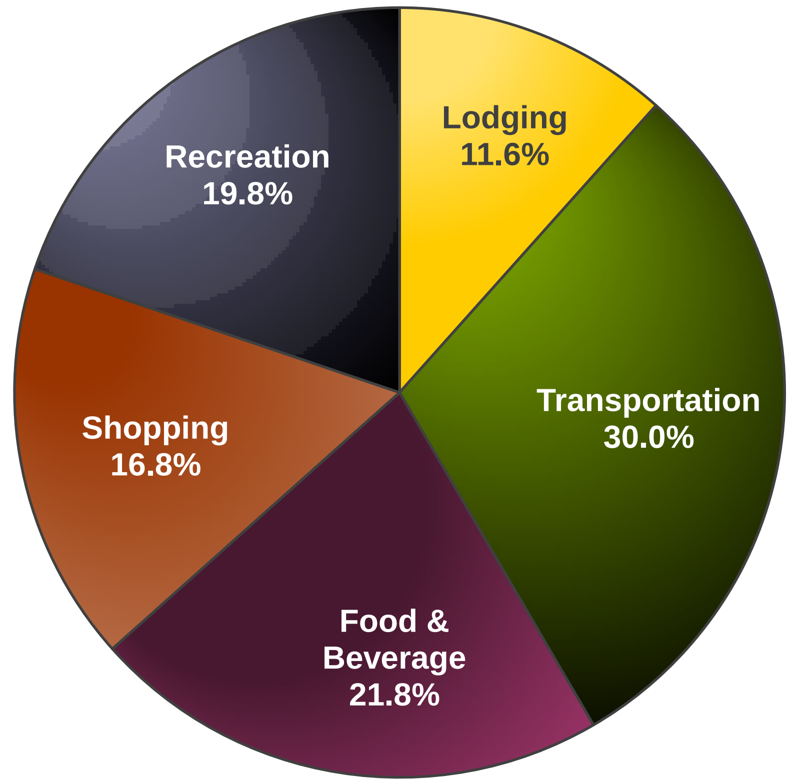
The Alleghenies – 2012 & 2013 Economy impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2013					
Bedford	296.7	2,933	99.9	26.2	25.3
Blair	325.0	4,130	143.7	31.1	31.6
Cambria	316.1	3,527	138.9	29.4	29.5
Centre	728.1	7,441	259.6	66.1	64.5
Fulton	24.7	284	9.4	2.0	1.9
Huntingdon	169.7	2,037	64.6	15.4	15.2
Juniata	38.6	450	14.4	3.0	2.7
Mifflin	68.1	1,055	33.4	6.3	6.3
The Alleghenies	1,967.0	21,855.7	764.0	179.5	176.9
Percent Change	2.2%	0.9%	2.2%	2.2%	2.7%
2012					
Bedford	294.4	2,923	97.7	26.0	25.1
Blair	323.0	4,069	141.8	30.8	31.1
Cambria	318.8	3,546	137.8	29.5	29.3
Centre	688.1	7,341	250.9	63.0	61.2
Fulton	24.9	283	9.5	2.0	1.9
Huntingdon	170.9	1,994	62.7	15.2	14.8
Juniata	38.1	449	14.4	2.9	2.6
Mifflin	66.7	1,047	32.9	6.1	6.1
The Alleghenies	1,924.9	21,652.1	747.6	175.6	172.3

Valleys of the Susquehanna

- The Valleys of the Susquehanna region is comprised of the following counties: Columbia, Montour, Northumberland, Snyder, and Union.
- Travelers spent a record high $624 million in the Valleys of the Susquehanna region in 2013 – a 0.4% increase from 2012.
- The Valleys of the Susquehanna region continued to have the highest proportion of spending on food & beverages among the state's 11 tourism regions in 2013.

Valleys of the Susquehanna Region 2013 Spending by Category

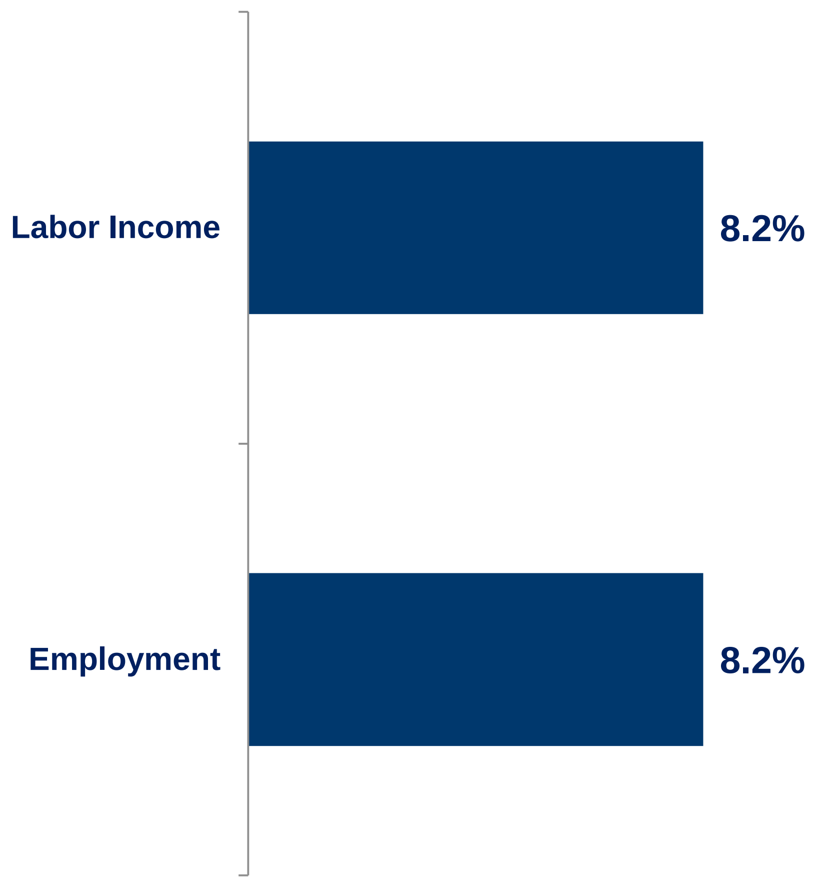


Source: Tourism Economics

Valleys of the Susquehanna

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- The travel-related labor income share for the Valleys of the Susquehanna region grew to 8.2% in 2013, equal to the industry's regional employment share that was unchanged from 2012.
- The region continued to have the smallest number of travel-supported jobs among PA's 11 tourism regions in 2013, with the travel industry's employment share dropping from 8th in 2012 to 9th.

Travel Industry Share of Regional Economy



Valleys of the Susquehanna - Timelines

Tourism Industry Spending (Millions of dollars)									
County	2005	2006	2007	2008	2009	2010	2011	2012	2013
Columbia	114.5	117.8	125.5	140.3	114.5	127.6	150.5	150.6	153.6
Montour	84.8	84.5	84.9	93.5	79.2	88.0	97.3	105.3	102.1
Northumberland	96.5	99.5	102.9	114.4	99.1	113.3	118.3	118.3	124.4
Snyder	79.8	81.0	84.3	90.3	74.9	83.5	90.6	90.2	95.3
Union	110.2	113.4	118.0	136.7	115.7	124.3	147.8	157.5	149.0
Valleys of the Susquehanna	485.7	496.1	515.6	575.2	483.3	536.6	604.6	622.0	624.4
Percent Change		2.1%	3.9%	11.6%	-16.0%	11.0%	12.7%	2.9%	0.4%

Tourism Industry Employment Impacts									
County	2005	2006	2007	2008	2009	2010	2011	2012	2013
Columbia	1,082	1,111	1,147	1,163	1,141	1,171	1,217	1,258	1,293
Montour	861	865	863	850	800	823	839	863	885
Northumberland	953	984	980	997	943	988	1,013	1,050	1,068
Snyder	667	687	690	702	665	691	702	722	741
Union	1,040	1,063	1,098	1,116	1,098	1,126	1,152	1,188	1,226
Valleys of the Susquehanna	4,603	4,710	4,777	4,828	4,647	4,799	4,924	5,081	5,213
Percent Change		2.3%	1.4%	1.1%	-3.7%	3.3%	2.6%	3.2%	2.6%

Valleys of the Susquehanna – 2012 & 2013 Traveler spending

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2013						
Columbia	19.6	36.2	26.3	25.9	45.6	153.6
Montour	15.0	20.4	15.8	20.4	30.4	102.1
Northumberland	4.1	22.2	16.0	35.9	46.3	124.4
Snyder	10.7	21.8	19.7	18.4	24.6	95.3
Union	22.9	35.6	27.4	23.1	40.0	149.0
Valleys of the Susquehanna	72.3	136.3	105.1	123.7	187.0	624.4
Percent Change	-2.9%	2.4%	-1.4%	4.5%	-1.3%	0.4%
2012						
Columbia	19.1	34.6	26.1	25.3	45.5	150.6
Montour	15.9	20.4	16.4	20.7	31.9	105.3
Northumberland	4.3	21.5	16.1	30.0	46.4	118.3
Snyder	9.9	20.5	18.9	17.2	23.6	90.2
Union	25.2	36.0	29.0	25.1	42.1	157.5
Valleys of the Susquehanna	74.4	133.1	106.6	118.3	189.5	622.0

Valleys of the Susquehanna – 2012 & 2013 TSA Spending

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2013				
Columbia	153.6	0.7	7.0	161.3
Montour	102.1	0.5	4.6	107.3
Northumberland	124.4	0.4	5.7	130.5
Snyder	95.3	0.4	4.3	100.1
Union	149.0	0.8	6.8	156.5
Valleys of the Susquehanna	624.4	3.0	28.4	655.7
Percent Change	0.4%	-0.9%	-1.5%	0.3%
2012				
Columbia	150.6	0.7	7.0	158.3
Montour	105.3	0.6	4.9	110.7
Northumberland	118.3	0.4	5.5	124.2
Snyder	90.2	0.4	4.2	94.8
Union	157.5	0.8	7.3	165.6
Valleys of the Susquehanna	622.0	3.0	28.8	653.7

Valleys of the Susquehanna – 2012 & 2013 Industry impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2013					
Columbia	153.6	1,293	29.1	8.2	6.9
Montour	102.1	885	20.6	5.6	4.8
Northumberland	124.4	1,068	28.9	7.0	6.4
Snyder	95.3	741	15.7	4.9	4.0
Union	149.0	1,226	29.8	8.2	6.9
Valleys of the Susquehanna	624.4	5,212.9	124.2	33.9	29.0
Percent Change	0.4%	2.6%	4.6%	1.6%	2.8%
2012					
Columbia	150.6	1,258	27.8	8.0	6.7
Montour	105.3	863	20.0	5.7	4.8
Northumberland	118.3	1,050	27.2	6.6	6.0
Snyder	90.2	722	15.2	4.6	3.8
Union	157.5	1,188	28.5	8.4	6.9
Valleys of the Susquehanna	622.0	5,080.6	118.7	33.3	28.2

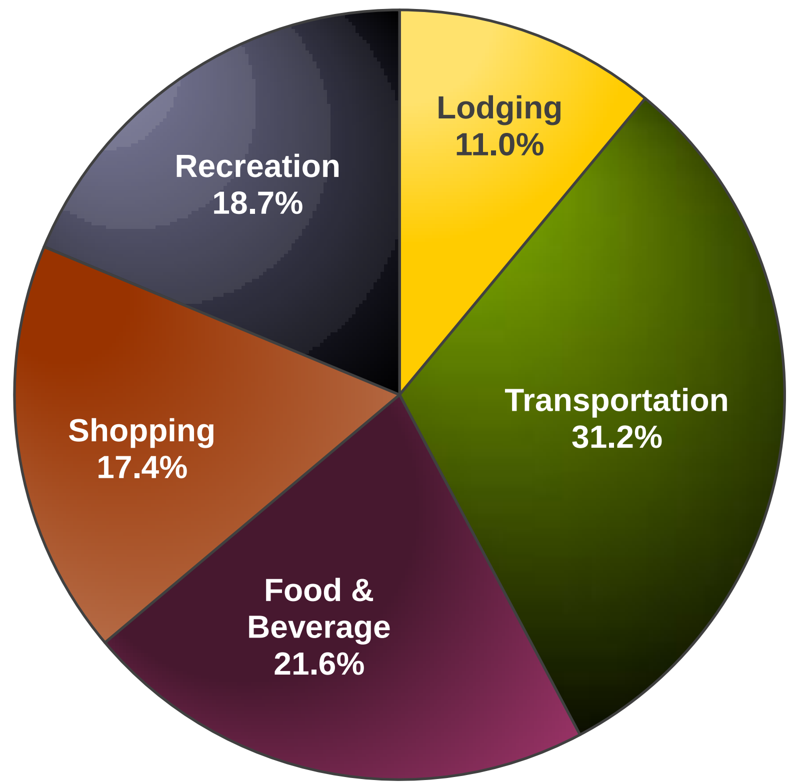
Valleys of the Susquehanna – 2012 & 2013 Economy Impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2013					
Columbia	161.3	2,072	63.4	14.4	14.0
Montour	107.3	1,284	38.4	9.9	9.6
Northumberland	130.5	1,896	68.0	12.4	12.8
Snyder	100.1	1,205	35.5	8.5	8.0
Union	156.5	1,880	59.6	14.3	14.0
Valleys of the Susquehanna	655.7	8,336.7	264.9	59.5	58.4
Percent Change	0.3%	1.8%	2.8%	1.6%	2.8%
2012					
Columbia	158.3	2,034	61.6	14.0	13.5
Montour	110.7	1,259	37.6	9.9	9.6
Northumberland	124.2	1,878	65.5	11.8	12.1
Snyder	94.8	1,184	35.0	8.1	7.7
Union	165.6	1,837	57.9	14.7	14.0
Valleys of the Susquehanna	653.7	8,191.7	257.6	58.6	56.8

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 2013 – a 0.2% increase from 2012 and a new record high.
- The Upstate PA region had the 2nd highest share of spending on food & beverages among the state's 11 tourism regions in 2013.

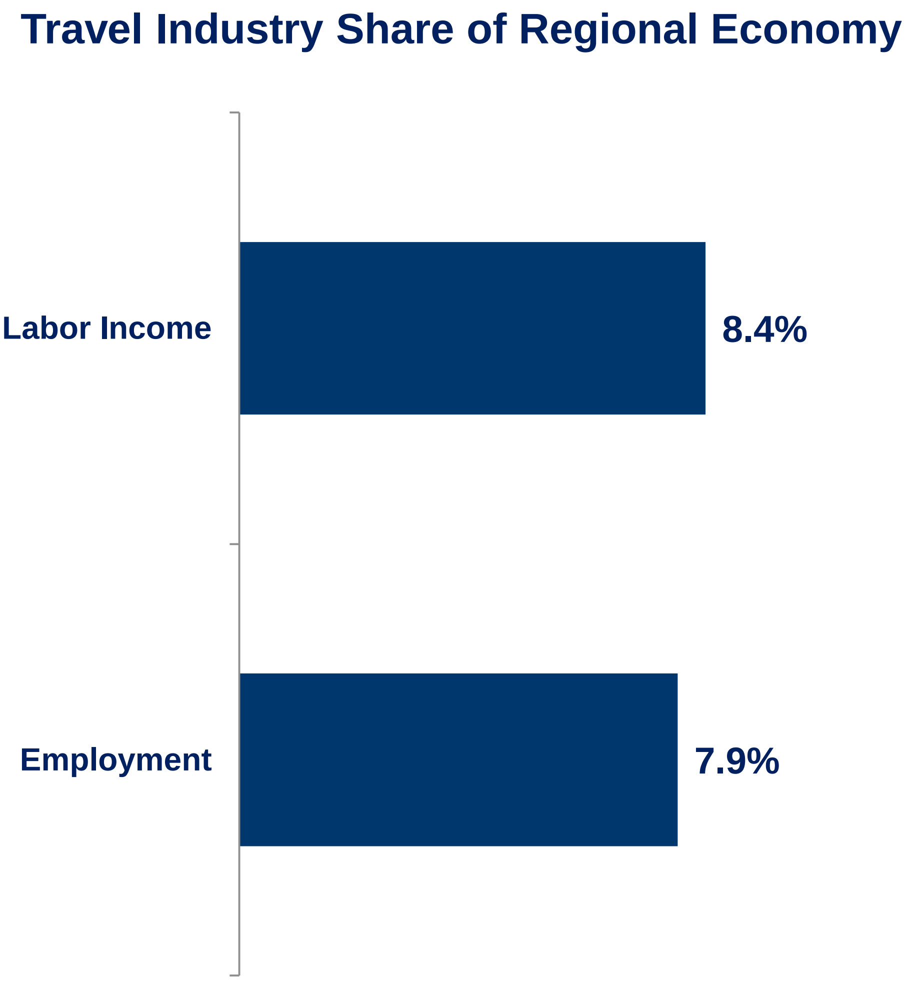
Upstate PA Region
2013 Spending by Category



Source: Tourism Economics

Upstate PA

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- The travel-related labor income share for the Upstate PA region was 8.4% in 2013, above the region's 7.9% employment share.
- As in 2012, the region's employment share was the second lowest percentage of PA's 11 tourism regions, but the region ranked 5th in the actual number of travel-supported jobs.



Upstate PA – Timelines

Tourism Industry Spending (Millions of dollars)									
County	2005	2006	2007	2008	2009	2010	2011	2012	2013
Bradford	125.2	126.4	134.7	148.3	136.3	170.0	200.5	225.3	223.1
Lackawanna	478.4	482.8	514.4	566.5	483.1	536.5	615.5	632.1	647.9
Luzerne	674.5	702.6	752.5	818.6	708.3	795.5	870.3	870.2	859.6
Schuylkill	164.3	168.8	177.5	195.2	158.5	159.2	176.8	195.7	196.4
Sullivan	12.7	12.3	12.9	14.4	13.1	16.0	18.7	19.7	19.1
Susquehanna	107.5	112.6	121.5	140.4	122.7	141.6	151.8	164.3	163.2
Wyoming	33.2	35.3	37.0	40.3	36.8	41.3	53.1	61.2	64.1
UPSTATE PA	1,596.0	1,640.7	1,750.4	1,923.7	1,658.6	1,860.2	2,086.6	2,168.5	2,173.5
Percent Change		2.8%	6.7%	9.9%	-13.8%	12.2%	12.2%	3.9%	0.2%

Tourism Industry Employment Impacts									
County	2005	2006	2007	2008	2009	2010	2011	2012	2013
Bradford	1,017	1,014	1,011	1,031	1,037	1,252	1,326	1,333	1,404
Lackawanna	4,537	4,626	4,769	4,855	4,563	4,752	4,882	5,006	5,138
Luzerne	5,789	6,028	6,142	6,253	5,978	6,275	6,534	6,619	6,765
Schuylkill	1,207	1,215	1,254	1,287	1,187	1,165	1,177	1,203	1,220
Sullivan	109	111	116	118	117	138	148	160	173
Susquehanna	1,022	1,053	1,059	1,044	1,002	1,024	1,061	1,060	1,107
Wyoming	349	351	359	364	365	362	379	400	422
UPSTATE PA	14,030	14,399	14,709	14,952	14,250	14,967	15,507	15,781	16,228
Percent Change		2.6%	2.2%	1.7%	-4.7%	5.0%	3.6%	1.8%	2.8%

Upstate PA – 2012 & 2013 Traveler spending

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2013						
Bradford	23.4	46.1	34.0	36.4	83.3	223.1
Lackawanna	82.3	145.3	129.6	113.3	177.4	647.9
Luzerne	96.3	183.0	142.8	182.7	254.8	859.6
Schuylkill	15.7	45.8	33.2	30.5	71.1	196.4
Sullivan	2.2	3.2	2.7	5.4	5.6	19.1
Susquehanna	11.5	33.4	24.1	28.8	65.5	163.2
Wyoming	8.8	13.5	11.8	10.1	19.9	64.1
UPSTATE PA	240.1	470.4	378.3	407.1	677.7	2,173.5
Percent Change	-1.7%	2.6%	-0.9%	2.1%	-1.1%	0.2%
2012						
Bradford	24.0	44.8	34.5	36.2	85.7	225.3
Lackawanna	81.2	140.3	128.5	107.5	174.5	632.1
Luzerne	100.9	181.0	146.8	181.4	260.1	870.2
Schuylkill	15.2	43.8	33.0	29.5	74.4	195.7
Sullivan	2.4	3.3	2.8	5.4	5.8	19.7
Susquehanna	12.3	32.8	24.9	29.1	65.1	164.3
Wyoming	8.2	12.7	11.2	9.5	19.6	61.2
UPSTATE PA	244.2	458.6	381.7	398.8	685.2	2,168.5

Upstate PA – 2012 & 2013 TSA spending

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2013				
Bradford	223.1	1.0	10.1	234.2
Lackawanna	647.9	3.4	29.4	680.8
Luzerne	859.6	4.8	39.1	903.5
Schuylkill	196.4	0.8	8.9	206.1
Sullivan	19.1	0.1	0.9	20.1
Susquehanna	163.2	0.6	7.4	171.3
Wyoming	64.1	0.3	2.9	67.2
UPSTATE PA	2,173.5	11.0	98.7	2,283.2
Percent Change	0.2%	-0.9%	-1.7%	0.1%
2012				
Bradford	225.3	1.0	10.4	236.7
Lackawanna	632.1	3.4	29.3	664.8
Luzerne	870.2	4.9	40.3	915.4
Schuylkill	195.7	0.8	9.1	205.6
Sullivan	19.7	0.1	0.9	20.7
Susquehanna	164.3	0.6	7.6	172.5
Wyoming	61.2	0.3	2.8	64.2
UPSTATE PA	2,168.5	11.1	100.4	2,280.0

Upstate PA – 2012 & 2013 Industry impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2013					
Bradford	223.1	1,404	34.3	11.1	9.0
Lackawanna	647.9	5,138	125.1	36.5	29.6
Luzerne	859.6	6,765	190.2	49.2	42.6
Schuylkill	196.4	1,220	38.3	10.4	9.0
Sullivan	19.1	173	3.6	1.0	0.9
Susquehanna	163.2	1,107	24.0	7.9	6.4
Wyoming	64.1	422	10.5	3.3	2.7
UPSTATE PA	2,173.5	16,228.0	426.0	119.4	100.1
Percent Change	0.2%	2.8%	6.2%	2.4%	3.6%
2012					
Bradford	225.3	1,333	31.8	10.9	8.7
Lackawanna	632.1	5,006	114.7	34.0	27.9
Luzerne	870.2	6,619	182.7	49.5	41.8
Schuylkill	195.7	1,203	36.9	10.3	8.8
Sullivan	19.7	160	3.2	1.0	0.8
Susquehanna	164.3	1,060	22.5	7.8	6.2
Wyoming	61.2	400	9.3	3.1	2.4
UPSTATE PA	2,168.5	15,780.7	401.0	116.6	96.6

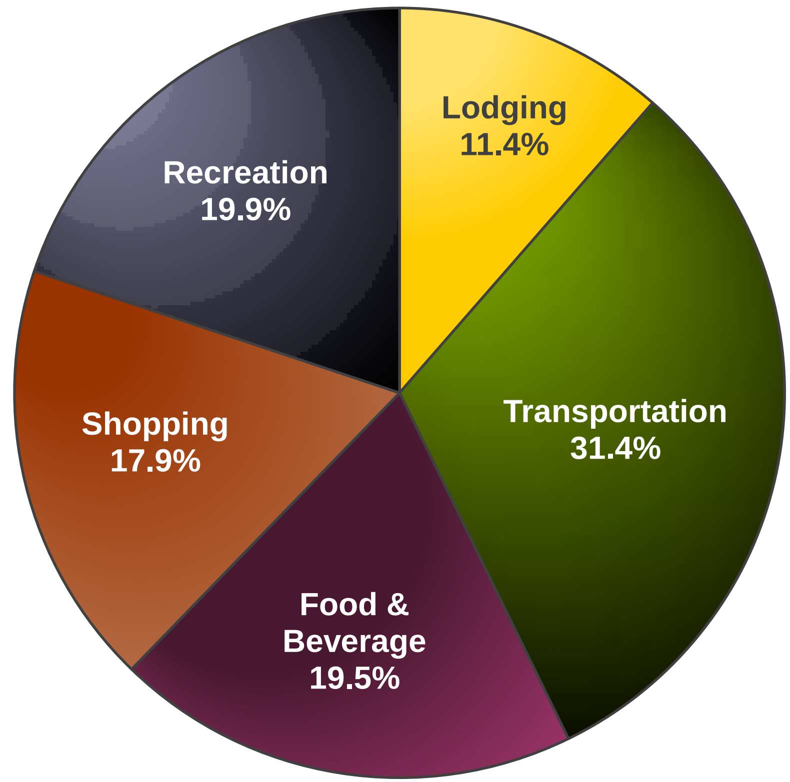
Upstate PA – 2012 & 2013 Economy impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2013					
Bradford	234.2	2,213	71.2	19.4	18.0
Lackawanna	680.8	8,003	255.6	62.8	59.5
Luzerne	903.5	10,785	386.1	86.1	85.8
Schuylkill	206.1	2,397	95.8	18.4	18.2
Sullivan	20.1	258	7.2	1.8	1.7
Susquehanna	171.3	1,732	51.0	13.9	12.9
Wyoming	67.2	701	23.3	5.8	5.4
UPSTATE PA	2,283.2	26,089.6	890.1	208.2	201.5
Percent Change	0.1%	1.9%	4.0%	2.3%	3.6%
2012					
Bradford	236.7	2,130	67.8	19.2	17.4
Lackawanna	664.8	7,858	241.0	59.2	56.1
Luzerne	915.4	10,630	376.3	86.3	84.2
Schuylkill	205.6	2,381	93.9	18.2	17.7
Sullivan	20.7	242	6.5	1.7	1.6
Susquehanna	172.5	1,678	48.9	13.7	12.5
Wyoming	64.2	675	21.6	5.4	4.9
UPSTATE PA	2,280.0	25,593.4	856.1	203.6	194.4

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 2013 – a new record high and the 4th highest in terms amount of traveler spending among PA's 11 tourism regions.
- The Pocono Mountains region had the 2nd highest share of spending on recreation and shopping among the state's 11 tourism regions in 2013.

Pocono Mountains Region
2013 Spending by Category

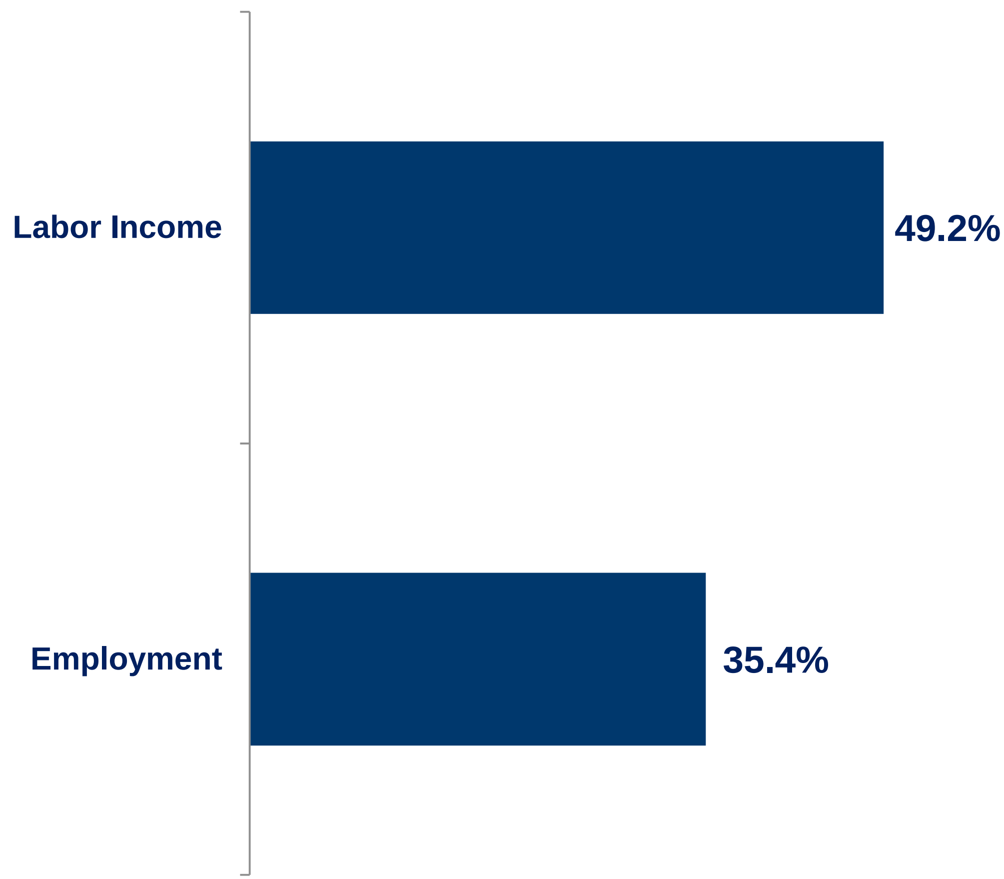


Source: Tourism Economics

Pocono Mountains

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- The region's travel-supported share of labor income was 49.2% in 2013, while the industry's employment share was 35.4% with both measures showing slightly higher concentration levels than in 2012.
- As in prior years, the Pocono Mountains region had, by far, the highest proportion of labor income and employment supported by travel of PA's 11 tourism regions.

Travel Industry Share of Regional Economy



Pocono Mountains - Timelines

Tourism Industry Spending (Millions of dollars)									
County	2005	2006	2007	2008	2009	2010	2011	2012	2013
Carbon	299.4	288.8	303.3	320.2	294.5	314.7	332.4	343.7	345.4
Monroe	1,371.4	1,370.7	1,472.5	1,665.3	1,372.6	1,502.1	1,552.0	1,607.5	1,596.0
Pike	545.4	543.5	559.6	616.5	520.7	538.0	553.5	575.1	605.9
Wayne	371.4	382.6	409.3	437.6	400.4	422.4	432.7	429.5	424.2
Pocono Mountains	2,587.5	2,585.6	2,744.7	3,039.6	2,588.2	2,777.2	2,870.7	2,955.9	2,971.3
Percent Change		-0.1%	6.2%	10.7%	-14.9%	7.3%	3.4%	3.0%	0.5%

Tourism Industry Employment Impacts									
County	2005	2006	2007	2008	2009	2010	2011	2012	2013
Carbon	2,819	2,775	2,816	2,792	2,766	2,717	2,733	2,638	2,699
Monroe	13,123	13,192	13,719	13,777	12,780	12,937	13,011	12,847	12,940
Pike	5,629	5,658	5,758	5,715	5,257	4,856	4,852	4,760	4,861
Wayne	3,072	3,170	3,157	3,212	3,151	3,107	3,120	3,143	3,127
Pocono Mountains	24,642	24,794	25,451	25,496	23,954	23,617	23,717	23,388	23,627
Percent Change		0.6%	2.6%	0.2%	-6.0%	-1.4%	0.4%	-1.4%	1.0%

Pocono Mountains – 2012 & 2013 Traveler spending

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2013						
Carbon	35.8	67.8	51.1	68.7	121.9	345.4
Monroe	191.4	296.9	310.7	343.5	453.4	1,596.0
Pike	68.4	124.8	99.2	103.1	210.3	605.9
Wayne	43.7	88.6	69.9	75.1	146.8	424.2
Pocono Mountains	339.5	578.2	530.7	590.4	932.5	2,971.3
Percent Change	0.5%	3.4%	1.1%	-3.0%	0.8%	0.5%
2012						
Carbon	37.4	66.7	51.6	66.4	121.7	343.7
Monroe	190.7	285.5	307.2	370.8	453.3	1,607.5
Pike	64.2	118.2	95.1	96.6	201.0	575.1
Wayne	45.7	89.0	70.9	74.8	149.1	429.5
Pocono Mountains	337.9	559.4	524.9	608.6	925.0	2,955.9

Pocono Mountains – 2012 & 2013 TSA spending

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2013				
Carbon	345.4	1.4	15.7	362.5
Monroe	1,596.0	7.7	72.5	1,676.1
Pike	605.9	2.6	27.5	636.0
Wayne	424.2	1.7	19.3	445.1
Pocono Mountains	2,971.3	13.3	135.0	3,119.7
Percent Change	0.5%	-0.9%	-1.4%	0.4%
2012				
Carbon	343.7	1.4	15.9	361.1
Monroe	1,607.5	7.8	74.4	1,689.8
Pike	575.1	2.5	26.6	604.3
Wayne	429.5	1.7	19.9	451.1
Pocono Mountains	2,955.9	13.4	136.9	3,106.2

Pocono Mountains – 2012 & 2013 Industry impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2013					
Carbon	345.4	2,699	62.9	17.9	15.2
Monroe	1,596.0	12,940	398.2	94.5	85.2
Pike	605.9	4,861	152.9	35.8	32.6
Wayne	424.2	3,127	95.9	23.7	21.3
Pocono Mountains	2,971.3	23,627.4	709.9	171.9	154.4
Percent Change	0.5%	1.0%	4.8%	1.7%	3.0%
2012					
Carbon	343.7	2,638	59.3	17.6	14.7
Monroe	1,607.5	12,847	376.6	93.3	82.7
Pike	575.1	4,760	145.6	34.2	31.1
Wayne	429.5	3,143	96.1	24.0	21.5
Pocono Mountains	2,955.9	23,387.9	677.6	169.0	149.9

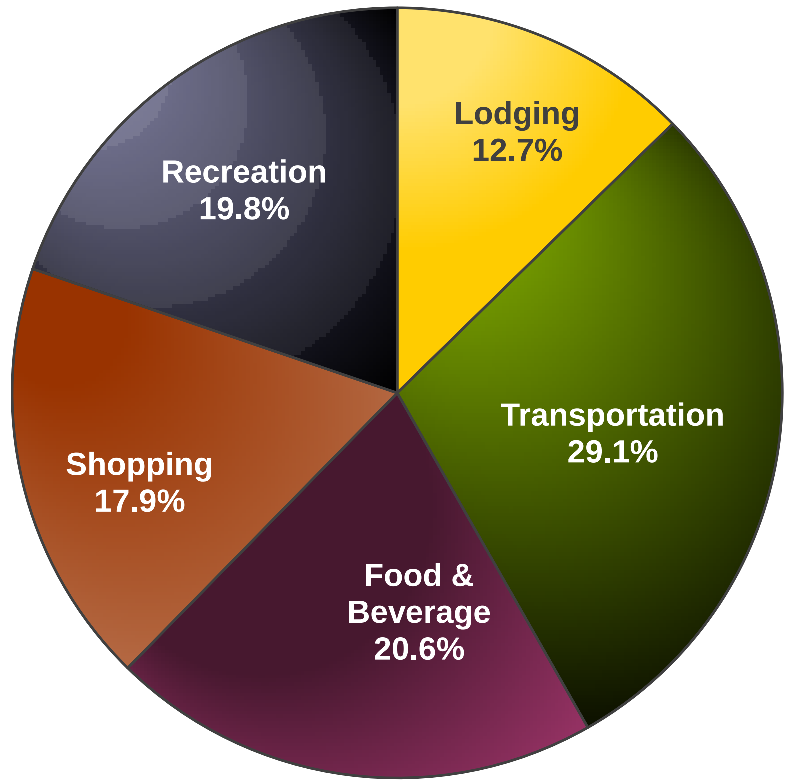
Pocono Mountains – 2012 & 2013 Economy impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2013					
Carbon	362.5	3,980	120.1	31.6	30.7
Monroe	1,676.1	18,503	695.5	166.7	171.9
Pike	636.0	6,877	263.0	63.3	65.8
Wayne	445.1	4,595	173.0	42.1	42.9
Pocono Mountains	3,119.7	33,954.6	1,251.6	303.7	311.2
Percent Change	0.4%	0.6%	3.5%	1.7%	3.0%
2012					
Carbon	361.1	3,915	115.2	31.0	29.6
Monroe	1,689.8	18,442	666.3	164.4	166.6
Pike	604.3	6,769	253.3	60.6	62.7
Wayne	451.1	4,629	174.2	42.6	43.2
Pocono Mountains	3,106.2	33,754.8	1,209.1	298.6	302.1

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 well over $7.8 billion in the Dutch Country Roads region in 2013 – the second highest level among PA's 11 tourism regions, a new record high, and a 2.6% increase from 2012.
- The Dutch Country Roads region continued to have the highest proportion of traveler spending on shopping and the 2nd lowest share on transportation of the state's 11 tourism regions in 2013.

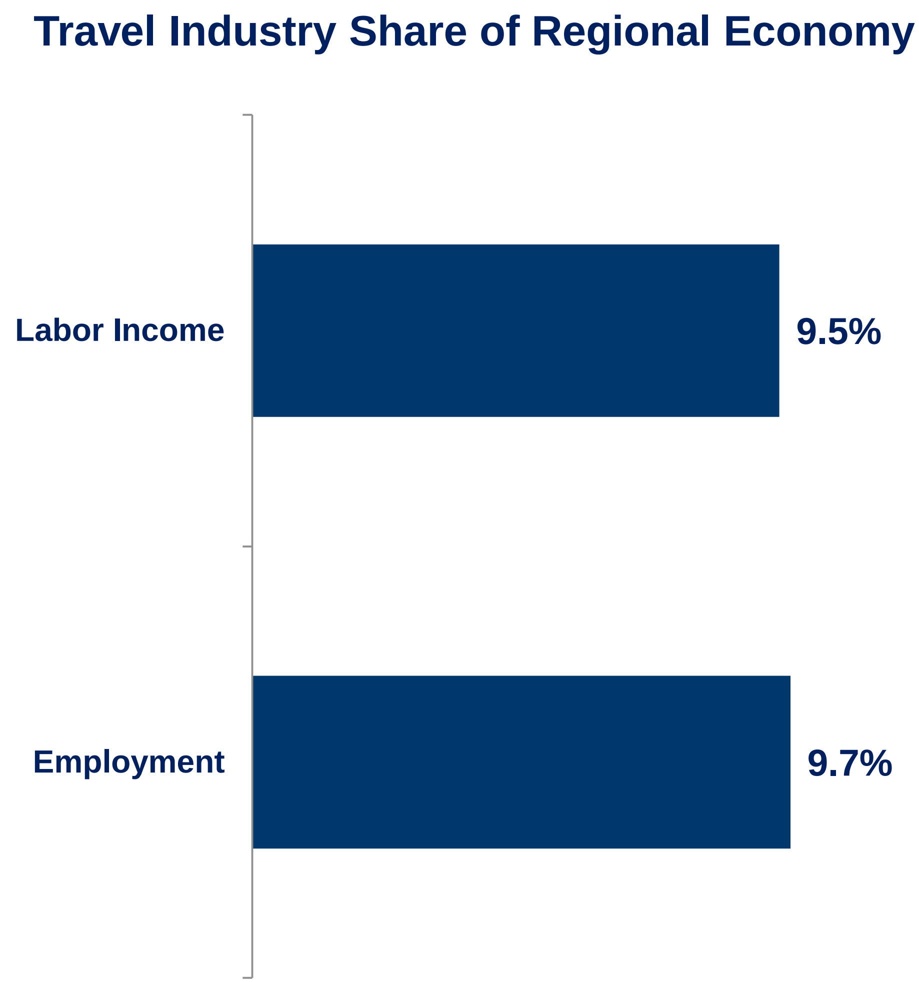
Dutch Country Roads Region 2013 Spending by Category



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 9.5% -- the 5th highest of PA's 11 tourism regions, while the employment share was unchanged at 9.7% in 2013.
- The region continued to have the 2nd highest number of travel-supported jobs among, PA's 11 tourism regions and to rank 4th in the travel industry's share of employment in the regional economy in 2013.



Dutch Country Roads - Timelines

Tourism Industry Spending (Millions of dollars)									
County	2005	2006	2007	2008	2009	2010	2011	2012	2013
Adams	479.1	502.2	535.1	602.8	520.9	555.8	608.0	628.8	671.3
Berks	643.8	650.6	668.1	746.9	623.7	687.7	762.7	794.8	807.3
Cumberland	634.4	657.6	674.9	774.2	628.3	677.8	726.7	749.8	759.6
Dauphin	1,704.3	1,801.6	1,867.7	2,142.4	1,878.7	2,013.3	2,135.1	2,213.7	2,282.3
Franklin	248.3	259.6	280.8	322.2	270.2	286.5	298.0	314.8	323.4
Lancaster	1,436.6	1,464.4	1,498.0	1,706.5	1,523.1	1,669.7	1,792.7	1,817.5	1,853.3
Lebanon	152.4	154.8	158.9	182.2	159.9	170.9	185.6	192.6	194.1
Perry	43.0	42.9	44.2	48.6	40.6	43.6	48.7	46.8	46.9
York	720.2	741.2	764.3	829.2	706.5	753.5	850.2	885.1	907.3
Dutch Country Roads	6,062.2	6,274.7	6,491.9	7,355.2	6,351.8	6,858.9	7,407.6	7,643.8	7,845.6
Percent Change		3.5%	3.5%	13.3%	-13.6%	8.0%	8.0%	3.2%	2.6%

Tourism Industry Employment Impacts									
County	2005	2006	2007	2008	2009	2010	2011	2012	2013
Adams	4,739	4,830	4,972	5,063	4,835	4,771	4,788	4,866	5,090
Berks	6,098	6,182	6,401	6,490	6,067	6,173	6,238	6,468	6,587
Cumberland	6,121	6,280	6,327	6,408	5,909	5,812	5,935	6,068	6,161
Dauphin	17,406	17,769	18,141	18,282	17,583	17,735	17,887	18,533	18,758
Franklin	2,338	2,385	2,462	2,473	2,298	2,276	2,288	2,352	2,441
Lancaster	14,128	14,637	14,696	14,766	14,381	14,640	14,753	15,239	15,505
Lebanon	1,629	1,636	1,636	1,627	1,544	1,534	1,562	1,609	1,656
Perry	300	301	304	309	296	302	310	321	327
York	7,577	7,560	7,741	7,656	7,213	7,038	7,165	7,421	7,534
Dutch Country Roads	60,336	61,580	62,680	63,074	60,127	60,281	60,927	62,877	64,059
Percent Change		2.1%	1.8%	0.6%	-4.7%	0.3%	1.1%	3.2%	1.9%

Dutch Country Roads – 2012 & 2013 Traveler spending

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2013						
Adams	86.8	132.2	124.3	155.0	173.0	671.3
Berks	78.4	175.2	154.9	138.9	260.0	807.3
Cumberland	100.8	173.1	136.3	123.3	226.1	759.6
Dauphin	339.7	417.2	346.1	541.7	637.7	2,282.3
Franklin	32.6	69.2	54.2	57.0	110.4	323.4
Lancaster	244.5	389.7	372.6	343.4	503.0	1,853.3
Lebanon	14.5	45.7	39.4	32.5	62.0	194.1
Perry	1.9	10.8	8.4	6.9	18.9	46.9
York	95.1	201.9	167.2	153.8	289.5	907.3
Dutch Country Roads	994.2	1,614.8	1,403.4	1,552.6	2,280.6	7,845.6
Percent Change	2.6%	4.3%	1.4%	3.9%	1.4%	2.6%
2012						
Adams	78.3	121.0	118.6	146.3	164.6	628.8
Berks	76.5	169.1	154.0	137.3	257.9	794.8
Cumberland	101.4	167.5	136.4	122.3	222.2	749.8
Dauphin	328.6	400.9	339.8	516.8	627.6	2,213.7
Franklin	32.1	66.6	53.6	54.1	108.4	314.8
Lancaster	242.6	374.2	368.0	330.1	502.6	1,817.5
Lebanon	15.2	44.5	39.6	31.6	61.8	192.6
Perry	2.0	10.5	8.4	6.8	19.2	46.8
York	92.6	193.6	166.1	148.8	284.0	885.1
Dutch Country Roads	969.0	1,548.0	1,384.5	1,494.0	2,248.3	7,643.8

Dutch Country Roads – 2012 & 2013 TSA spending

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2013				
Adams	671.3	3.3	30.5	705.1
Berks	807.3	3.9	36.7	847.9
Cumberland	759.6	3.8	34.5	798.0
Dauphin	2,282.3	15.5	103.7	2,401.5
Franklin	323.4	1.5	14.7	339.5
Lancaster	1,853.3	11.6	84.2	1,949.1
Lebanon	194.1	0.8	8.8	203.7
Perry	46.9	0.1	2.1	49.2
York	907.3	4.1	41.2	952.7
Dutch Country Roads	7,845.6	44.8	356.4	8,246.7
Percent Change	2.6%	0.4%	0.7%	2.5%
2012				
Adams	628.8	3.2	29.1	661.1
Berks	794.8	3.9	36.8	835.5
Cumberland	749.8	3.9	34.7	788.4
Dauphin	2,213.7	15.4	102.5	2,331.5
Franklin	314.8	1.5	14.6	330.9
Lancaster	1,817.5	11.6	84.2	1,913.3
Lebanon	192.6	0.8	8.9	202.3
Perry	46.8	0.1	2.2	49.1
York	885.1	4.1	41.0	930.2
Dutch Country Roads	7,643.8	44.6	354.0	8,042.4

Dutch Country Roads – 2012 & 2013 Industry impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2013					
Adams	671.3	5,090	139.8	38.2	32.0
Berks	807.3	6,587	180.0	45.9	40.2
Cumberland	759.6	6,161	158.7	42.1	36.3
Dauphin	2,282.3	18,758	593.0	142.9	125.2
Franklin	323.4	2,441	64.4	17.5	15.0
Lancaster	1,853.3	15,505	387.1	105.4	88.6
Lebanon	194.1	1,656	50.6	11.6	10.7
Perry	46.9	327	7.4	2.3	1.9
York	907.3	7,534	201.7	51.1	45.1
Dutch Country Roads	7,845.6	64,059	1,782.6	457.0	395.0
Percent Change	2.6%	1.9%	4.0%	3.0%	3.3%
2012					
Adams	628.8	4,866	130.5	35.1	30.0
Berks	794.8	6,468	173.9	45.0	39.2
Cumberland	749.8	6,068	153.5	41.4	35.5
Dauphin	2,213.7	18,533	568.1	138.3	120.7
Franklin	314.8	2,352	61.7	17.0	14.5
Lancaster	1,817.5	15,239	375.4	103.4	86.4
Lebanon	192.6	1,609	48.9	11.4	10.4
Perry	46.8	321	7.2	2.2	1.9
York	885.1	7,421	194.8	50.0	43.8
Dutch Country Roads	7,643.8	62,877	1,713.8	443.9	382.3

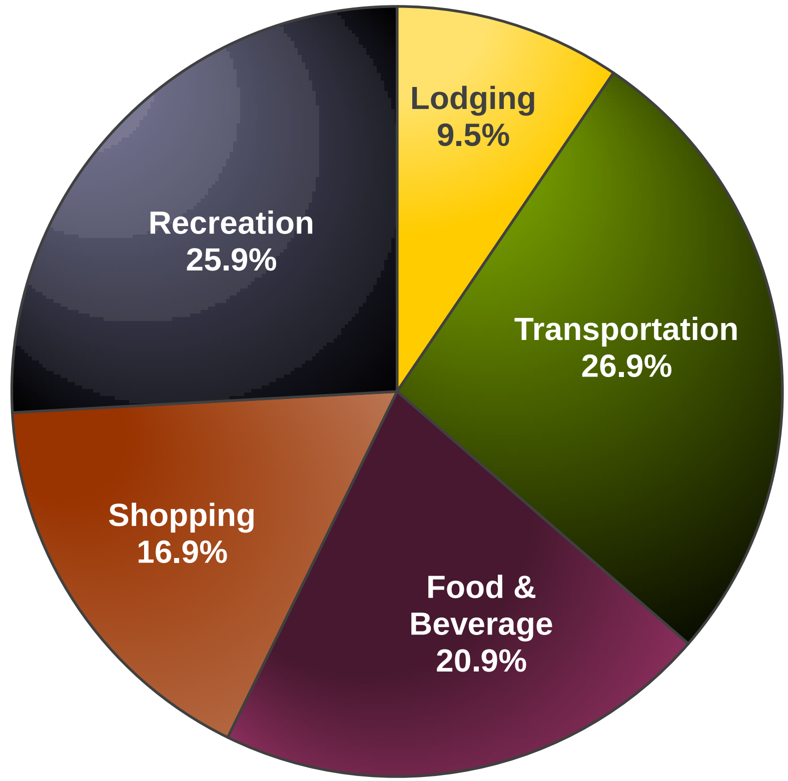
Dutch Country Roads – 2012 & 2013 Economy impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2013					
Adams	705.1	7,612	266.8	66.3	64.5
Berks	847.9	10,859	384.0	80.7	81.0
Cumberland	798.0	9,453	313.2	73.9	73.2
Dauphin	2,401.5	26,321	1,009.6	248.0	252.4
Franklin	339.5	4,040	139.5	30.8	30.3
Lancaster	1,949.1	23,391	752.0	183.0	178.5
Lebanon	203.7	2,895	112.0	20.5	21.5
Perry	49.2	692	23.5	4.0	3.8
York	952.7	12,246	425.1	90.1	90.8
Dutch Country Roads	8,246.7	97,507	3,425.7	797.4	796.0
Percent Change	2.5%	1.3%	2.7%	2.8%	3.3%
2012					
Adams	661.1	7,350	252.2	61.5	60.4
Berks	835.5	10,736	376.3	79.2	78.9
Cumberland	788.4	9,363	306.7	72.8	71.4
Dauphin	2,331.5	26,117	977.1	240.4	243.4
Franklin	330.9	3,938	136.0	29.9	29.2
Lancaster	1,913.3	23,121	737.6	179.6	174.1
Lebanon	202.3	2,843	109.8	20.3	21.0
Perry	49.1	685	23.2	4.0	3.8
York	930.2	12,136	416.5	88.1	88.2
Dutch Country Roads	8,042.4	96,290	3,335.6	775.7	770.4

Lehigh Valley

- The Lehigh Valley region is comprised the following counties: Lehigh and Northampton.
- Travelers spent more than $1.9 billion in the Lehigh Valley region in 2013 – a new record high and a 2.6% increase from 2012, which was the third highest percentage increase of PA's 11 tourism regions.
- With its proximity to the NY and NJ markets, a strong day-trip market, and regional attractions, the Lehigh Valley region continued to have the highest proportion of traveler spending on recreation among PA's 11 tourism regions and the lowest share spent on transportation.

Lehigh Valley Region
2013 Spending by Category

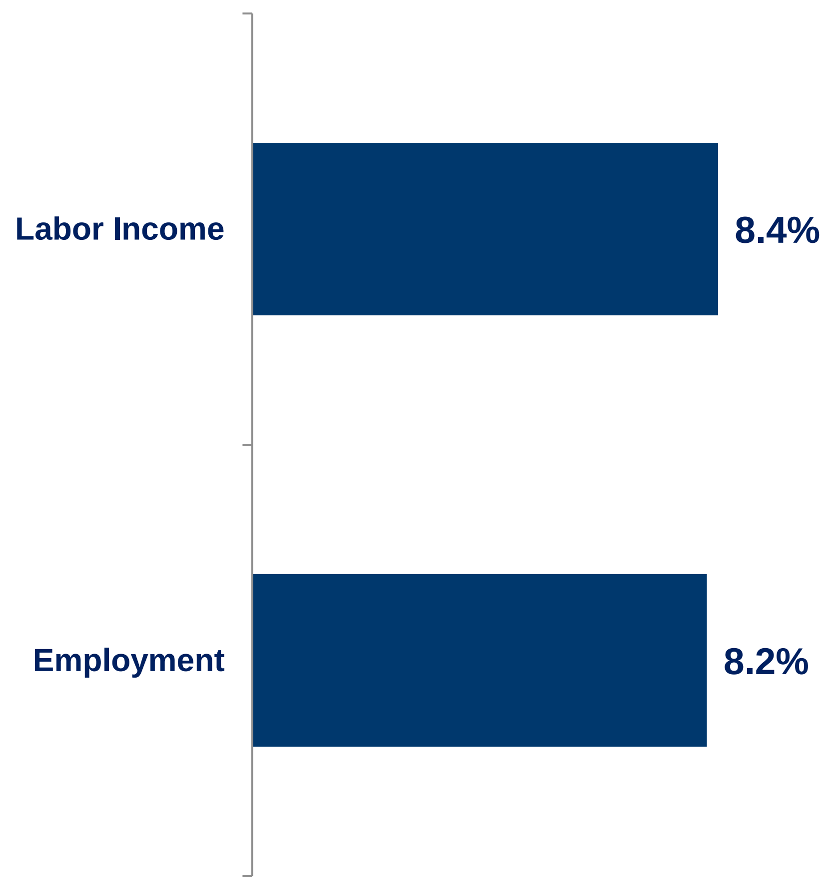


Source: Tourism Economics

Lehigh Valley

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- The travel-supported labor income share for the Lehigh Valley region was 8.4% - up 1.2 percentage points from 2012, while the industry's employment share grew to 8.2% in 2013.
- The region ranked 7th in the actual number of travel-supported jobs among PA's 11 tourism regions in 2013 and 8th in the share of travel-supported employment.

Travel Industry Share of Regional Economy



Lehigh Valley - Timelines

Tourism Industry Spending (Millions of dollars)									
County	2005	2006	2007	2008	2009	2010	2011	2012	2013
Lehigh	867.2	891.2	952.9	1,061.4	872.1	925.4	996.3	1,030.7	1,042.0
Northampton	472.5	494.2	517.7	581.2	518.3	596.1	761.4	827.0	864.0
Lehigh Valley	1,339.7	1,385.4	1,470.6	1,642.6	1,390.4	1,521.4	1,757.7	1,857.7	1,906.0
Percent Change		3.4%	6.2%	11.7%	-15.4%	9.4%	15.5%	5.7%	2.6%

Tourism Industry Employment Impacts									
County	2005	2006	2007	2008	2009	2010	2011	2012	2013
Lehigh	8,079	8,160	8,242	8,274	7,732	7,555	7,624	7,838	7,979
Northampton	4,963	4,938	5,111	5,208	5,074	5,448	5,816	6,180	6,335
Lehigh Valley	13,042.1	13,098.2	13,353.5	13,482.1	12,806.4	13,002.5	13,440.0	14,018.0	14,314.0
Percent Change		0.4%	1.9%	1.0%	-5.0%	1.5%	3.4%	4.3%	2.1%

Lehigh Valley – 2012 & 2013 Traveler spending

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2013						
Lehigh	99.4	243.4	206.3	203.2	289.7	1,042.0
Northampton	80.7	154.0	115.3	290.4	223.5	864.0
Lehigh Valley	180.2	397.4	321.6	493.6	513.3	1,906.0
Percent Change	1.1%	3.9%	1.4%	6.2%	-0.3%	2.6%
2012						
Lehigh	101.3	236.4	204.1	196.0	293.0	1,030.7
Northampton	76.8	146.2	112.9	268.9	222.1	827.0
Lehigh Valley	178.1	382.6	317.0	464.9	515.1	1,857.7

Lehigh Valley – 2012 & 2013 TSA spending

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2013				
Lehigh	1,042.0	5.2	47.3	1,094.6
Northampton	864.0	4.0	39.2	907.2
Lehigh Valley	1,906.0	9.3	86.6	2,001.9
Percent Change	2.6%	0.5%	0.6%	2.5%
2012				
Lehigh	1,030.7	5.3	47.7	1,083.7
Northampton	827.0	4.0	38.3	869.3
Lehigh Valley	1,857.7	9.2	86.0	1,952.9

Lehigh Valley – 2012 & 2013 Industry impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2013					
Lehigh	1,042.0	7,979	219.1	58.0	50.0
Northampton	864.0	6,335	235.1	53.5	48.8
Lehigh Valley	1,906.0	14,314.0	454.3	111.5	98.9
Percent Change	2.6%	2.1%	11.0%	5.3%	7.6%
2012					
Lehigh	1,030.7	7,838	211.6	57.1	48.8
Northampton	827.0	6,180	197.8	48.8	43.1
Lehigh Valley	1,857.7	14,018.0	409.4	105.9	91.9

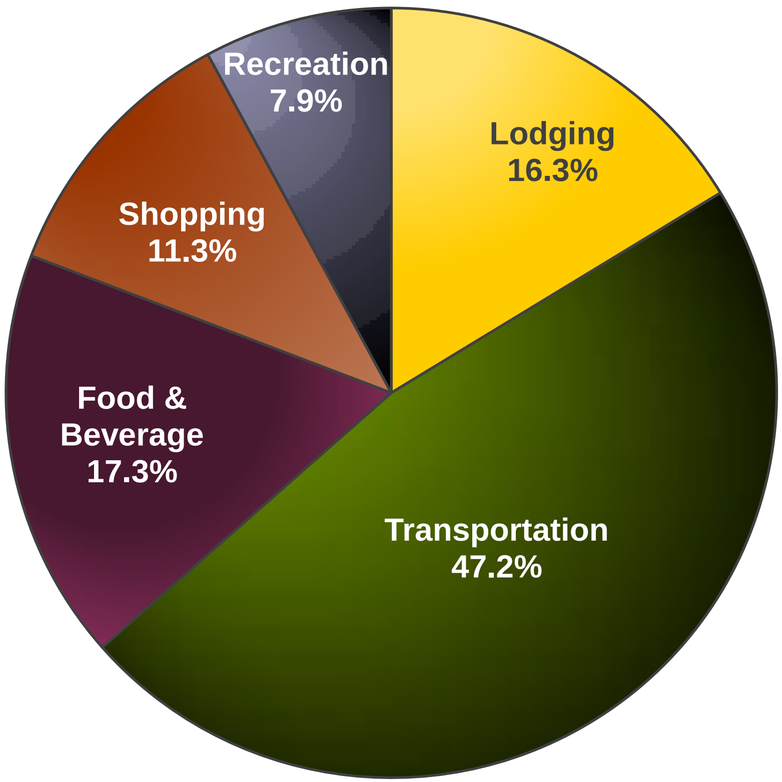
Lehigh Valley – 2012 & 2013 Economy impacts

Total Tourism Economy Impacts (Millions of dollars - except Employment, in Units)					
County	Total Tourism Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
2013					
Lehigh	1,094.6	12,515	438.3	101.7	100.8
Northampton	907.2	9,999	443.0	94.2	98.5
Lehigh Valley	2,001.9	22,513.9	881.3	195.9	199.3
Percent Change	2.5%	1.4%	7.8%	5.4%	7.6%
2012					
Lehigh	1,083.7	12,371	428.9	100.2	98.4
Northampton	869.3	9,831	388.4	85.7	86.8
Lehigh Valley	1,952.9	22,201.3	817.3	185.9	185.2

Philadelphia & The Countryside

- Philadelphia and The Countryside region is comprised of the following counties: Bucks, Chester, Delaware, Montgomery, and Philadelphia.
- Travelers spent well over $8.9 billion in the Philadelphia & The Countryside region in 2013 – a new record high and a 2.7% increase from 2012.
- The Philadelphia & The Countryside region continued to have the highest proportion of traveler spending on transportation and lodging and the lowest shares on recreation, food & beverages, and shopping of PA's 11 tourism regions in 2013.

Philadelphia & The Countryside Region 2013 Spending by Category

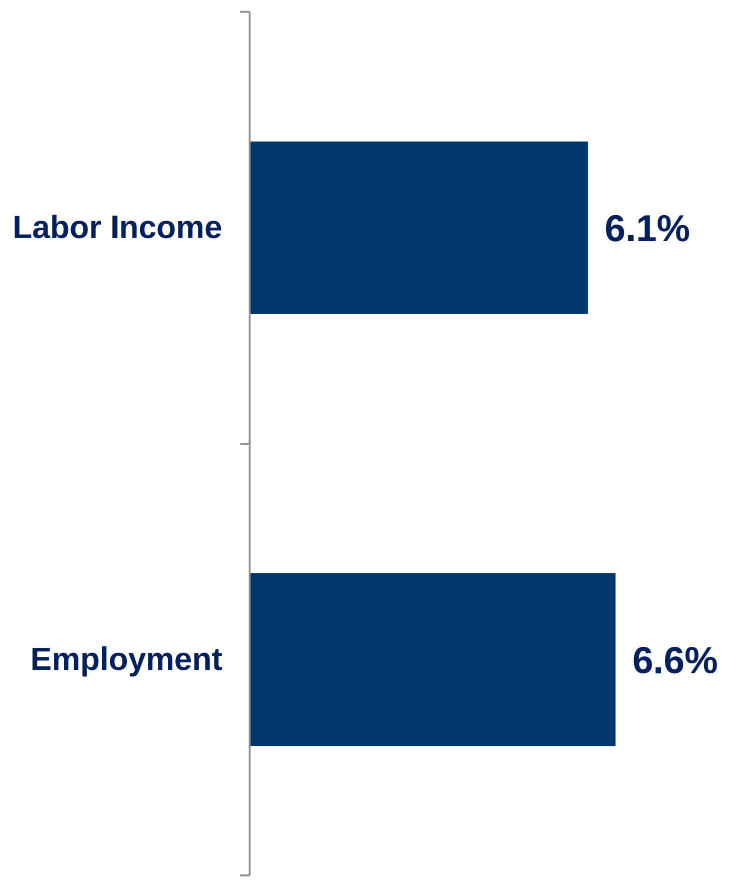


Source: Tourism Economics

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 6.1% in 2013 – a small increase from 2012, while the industry's share of the region's employment base was 6.6%.
- The region continued to have the highest number of travel-supported jobs among PA's 11 tourism regions in 2013, but the region ranked last in its travel-supported employment share as a result of the size and great diversity of its economy.

Travel Industry Share of Regional Economy



Philadelphia & The Countryside - Timelines

Tourism Industry Spending (Millions of dollars)									
County	2005	2006	2007	2008	2009	2010	2011	2012	2013
Bucks	582.1	602.8	640.3	704.5	629.2	673.2	728.0	743.6	741.8
Chester	543.8	557.7	595.5	680.1	608.2	646.7	684.2	713.8	730.1
Delaware	498.1	510.7	558.2	613.9	530.4	564.5	654.5	645.8	641.9
Montgomery	985.2	1,014.0	1,079.3	1,176.2	1,014.2	1,070.8	1,180.2	1,221.8	1,244.7
Philadelphia	4,401.4	4,673.9	4,879.8	5,334.7	4,736.2	5,044.0	5,290.9	5,389.9	5,590.2
Philadelphia & The Countryside	7,010.6	7,359.0	7,753.2	8,509.5	7,518.1	7,999.1	8,537.9	8,714.9	8,948.7
Percent Change		5.0%	5.4%	9.8%	-11.7%	6.4%	6.7%	2.1%	2.7%

Tourism Industry Employment Impacts									
County	2005	2006	2007	2008	2009	2010	2011	2012	2013
Bucks	8,054	8,280	8,545	8,795	8,482	8,389	8,568	8,717	8,789
Chester	6,790	6,944	7,172	7,286	6,983	6,823	6,879	7,052	7,188
Delaware	6,998	6,965	6,931	6,936	6,701	6,697	6,936	7,158	7,370
Montgomery	12,599	12,822	12,909	12,983	12,380	12,159	12,337	13,008	13,390
Philadelphia	31,855	32,640	33,719	33,755	31,929	32,221	32,669	33,628	34,472
Philadelphia & The Countryside	66,295.5	67,651.4	69,275.4	69,755.3	66,474.3	66,288.7	67,389.8	69,563.2	71,207.6
Percent Change		2.0%	2.4%	0.7%	-4.7%	-0.3%	1.7%	3.2%	2.4%

Philadelphia & The Countryside – 2012 & 2013 Traveler spending

Tourism Direct Sales (Millions of dollars)						
County	Lodging	Food & beverage	Retail	Recreation	Transport	Total
2013						
Bucks	122.0	160.1	111.2	75.1	273.3	741.8
Chester	127.3	154.2	105.9	74.5	268.2	730.1
Delaware	89.9	137.4	89.5	70.6	254.5	641.9
Montgomery	301.4	232.8	150.3	87.7	472.6	1,244.7
Philadelphia	818.4	867.9	556.5	395.1	2,952.4	5,590.2
Philadelphia & The Countryside	1,459.0	1,552.3	1,013.3	703.1	4,221.0	8,948.7
Percent Change	3.7%	1.7%	4.9%	1.3%	2.4%	2.7%
2012						
Bucks	123.1	160.6	105.9	76.7	277.2	743.6
Chester	123.7	151.0	98.0	74.2	267.0	713.8
Delaware	87.5	136.2	83.9	73.8	264.4	645.8
Montgomery	289.5	230.6	144.2	86.8	470.8	1,221.8
Philadelphia	783.8	847.7	534.1	382.7	2,841.6	5,389.9
Philadelphia & The Countryside	1,407.6	1,526.1	966.1	694.1	4,121.0	8,714.9

Philadelphia & The Countryside – 2012 & 2013 TSA spending

Tourism Satellite Account Categories (Millions of dollars)				
County	Visitor Spending	Governmt	Investment & Non-visitor PCE	Total Tourism Demand
2013				
Bucks	741.8	4.5	33.7	780.0
Chester	730.1	3.7	33.2	767.0
Delaware	641.9	3.2	29.2	674.3
Montgomery	1,244.7	6.9	56.5	1,308.2
Philadelphia	5,590.2	57.5	254.0	5,901.7
Philadelphia & The Countryside	8,948.7	75.9	406.5	9,431.2
Percent Change	2.7%	0.3%	0.7%	2.6%
2012				
Bucks	743.6	4.5	34.4	782.5
Chester	713.8	3.7	33.1	750.6
Delaware	645.8	3.3	29.9	678.9
Montgomery	1,221.8	6.9	56.6	1,285.3
Philadelphia	5,389.9	57.2	249.6	5,696.7
Philadelphia & The Countryside	8,714.9	75.7	403.6	9,194.1

Philadelphia & The Countryside – 2012 & 2013 Industry impacts

Tourism Industry Impacts (Millions of dollars - except Employment, in Units)					
County	Visitor Spend	Employment	Labor Income	Taxes	
				State & Local	Federal
2013					
Bucks	741.8	8,789	250.1	51.6	48.6
Chester	730.1	7,188	235.2	49.7	46.3
Delaware	641.9	7,370	256.0	48.3	47.5
Montgomery	1,244.7	13,390	475.6	91.7	89.2
Philadelphia	5,590.2	34,472	1,693.8	401.7	339.8
Philadelphia & The Countryside	8,948.7	71,207.6	2,910.6	643.0	571.4
Percent Change	2.7%	2.4%	5.9%	3.8%	4.6%
2012					
Bucks	743.6	8,717	244.0	51.4	47.9
Chester	713.8	7,052	222.3	47.3	44.4
Delaware	645.8	7,158	243.8	47.5	46.1
Montgomery	1,221.8	13,008	447.8	88.7	85.3
Philadelphia	5,389.9	33,628	1,589.4	384.6	322.5
Philadelphia & The Countryside	8,714.9	69,563.2	2,747.3	619.6	546.1

Philadelphia & The Countryside – 2012 & 2013 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					
Bucks	780.0	15,329	564.7	90.5	98.1
Chester	767.0	12,352	499.9	87.0	93.5
Delaware	674.3	12,944	547.4	85.2	96.0
Montgomery	1,308.2	22,629	970.6	161.5	180.4
Philadelphia	5,901.7	54,881	3,056.1	679.1	686.0
Philadelphia & The Countryside	9,431.2	118,135.6	5,638.6	1,103.4	1,154.0
Percent Change	2.6%	1.5%	4.1%	3.7%	4.6%
2012					
Bucks	782.5	15,276	557.8	90.1	96.8
Chester	750.6	12,212	482.4	83.5	89.6
Delaware	678.9	12,707	531.1	83.9	93.1
Montgomery	1,285.3	22,203	932.8	156.3	172.4
Philadelphia	5,696.7	53,963	2,913.0	650.5	651.0
Philadelphia & The Countryside	9,194.1	116,362.5	5,417.1	1,064.3	1,102.9

Methodology and Background

TOURISM ECONOMICS
AN OXFORD ECONOMICS COMPANY

Methods and data sources

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

Methods and data sources

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

- The source of the employment and wage data is the Regional Economic Information System (REIS), Bureau of Economic Analysis, U.S. Department of Commerce. All employment rankings are based on Bureau of Labor Statistics (ES202/QCEW) data.

Selected recent economic impact clients

Associations / Companies

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

DMAI (Event Impact Calculator for 80 CVBs)

US Travel Association (Impact of travel promotion)

InterContinental Hotels

States

California

Georgia

Maryland

New York

North Carolina

Ohio

Pennsylvania

Wisconsin

Cities

Baltimore, MD

Columbus, OH

Kansas City, MO

London, United Kingdom

New York City

Omaha, NE

Orlando, FL

Philadelphia, PA

Pittsburgh, PA

Rockford, IL

Countries / Provinces

Bahamas

Bermuda

Cayman Islands

Dubai

Ontario Canada

St. Lucia

United Kingdom

About Tourism Economics

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

TOURISM ECONOMICS

AN OXFORD ECONOMICS COMPANY

For more information:

Adam Sacks, Managing Director

adam@tourismeconomics.com

Christopher Pike, Senior Economist

cpike@tourismeconomics.com