

The Economic Impact of Travel and Tourism in Pennsylvania

County Data

Tourism Satellite Account
Calendar Year 2016



TOURISM
ECONOMICS

AN OXFORD ECONOMICS COMPANY

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 U.S. travelers. The state level data also includes estimates of the spending by international travelers from Canada and overseas markets in the total(s).
6. **Direct Sales:** The term used to portray visitor spending for the major categories of travel-related expenditures and equates to visitor/traveler spending.

Key definitions

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

Key Definitions

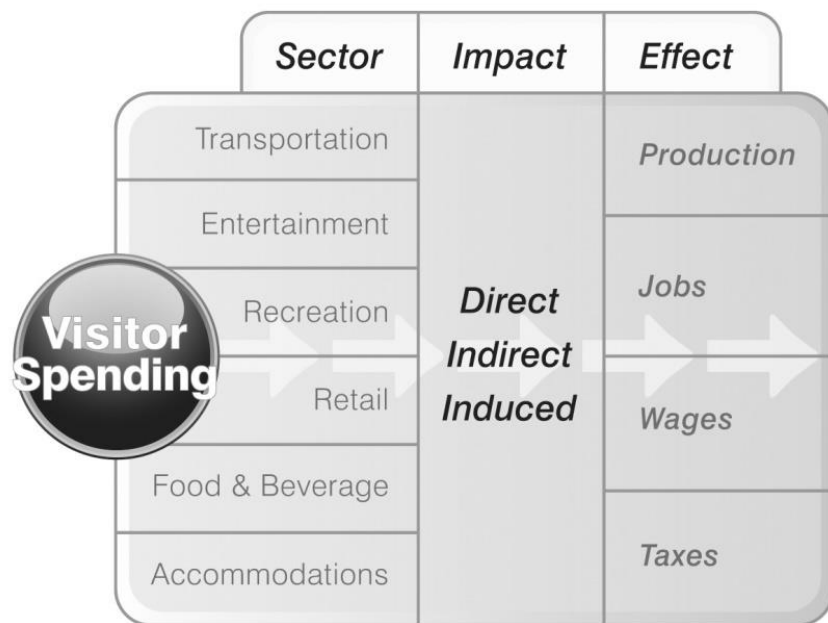
- 11. Jobs/Employment:** Estimates of the number of jobs – both full-time and part-time – supported by travel and tourism, reflecting the annual average number of monthly jobs supported by travel and tourism throughout the year and includes wage and salary jobs, sole proprietorships, and individual general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

Key Definitions – Spending Categories

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

How travel and tourism generates impact

How traveler spending generates economic impact and benefits



Tourism spending flows through the economy and generates economic benefit through multiple channels.

The analysis of the travel and tourism industry's impact on Pennsylvania's economy starts with actual spending by travelers and the downstream effects of this injection of spending into the local economy. To determine the total economic impact of travel and tourism in Pennsylvania, the estimated amount of total traveler spending is input into a model of the state's economy created in IMPLAN. This model calculates three distinct types of impact: direct, indirect, and induced.

- Traveler spending creates an amount of **direct** economic value within a discrete group of sectors (e.g. recreation, lodging, transportation, etc.). This spending supports a number of jobs, wages, taxes, and GDP within each sector.
- Each business with a direct interaction with travelers purchases goods and services from other types of businesses (e.g., food wholesalers, utilities, landscapers, banks, etc.) that do not have a direct interaction with travelers, but benefit from traveler spending nevertheless. These impacts are called **indirect** impacts.
- Lastly, the **induced** impact is generated when employees whose wages are generated, either directly or indirectly, by travel and tourism spend those wages in the local economy.

The effect of traveler spending on business sales, jobs, wages, and taxes are calculated for all three levels of impact.

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 Directly Interacting With Travelers



The businesses that directly interact with travelers 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 businesses directly interacting with travelers and their suppliers whose wages are either direct or indirectly derived from traveler spending, in turn spend their wages at local businesses. This is the **induced impact**.



Travel Economy Impact vs. Travel Industry Impact

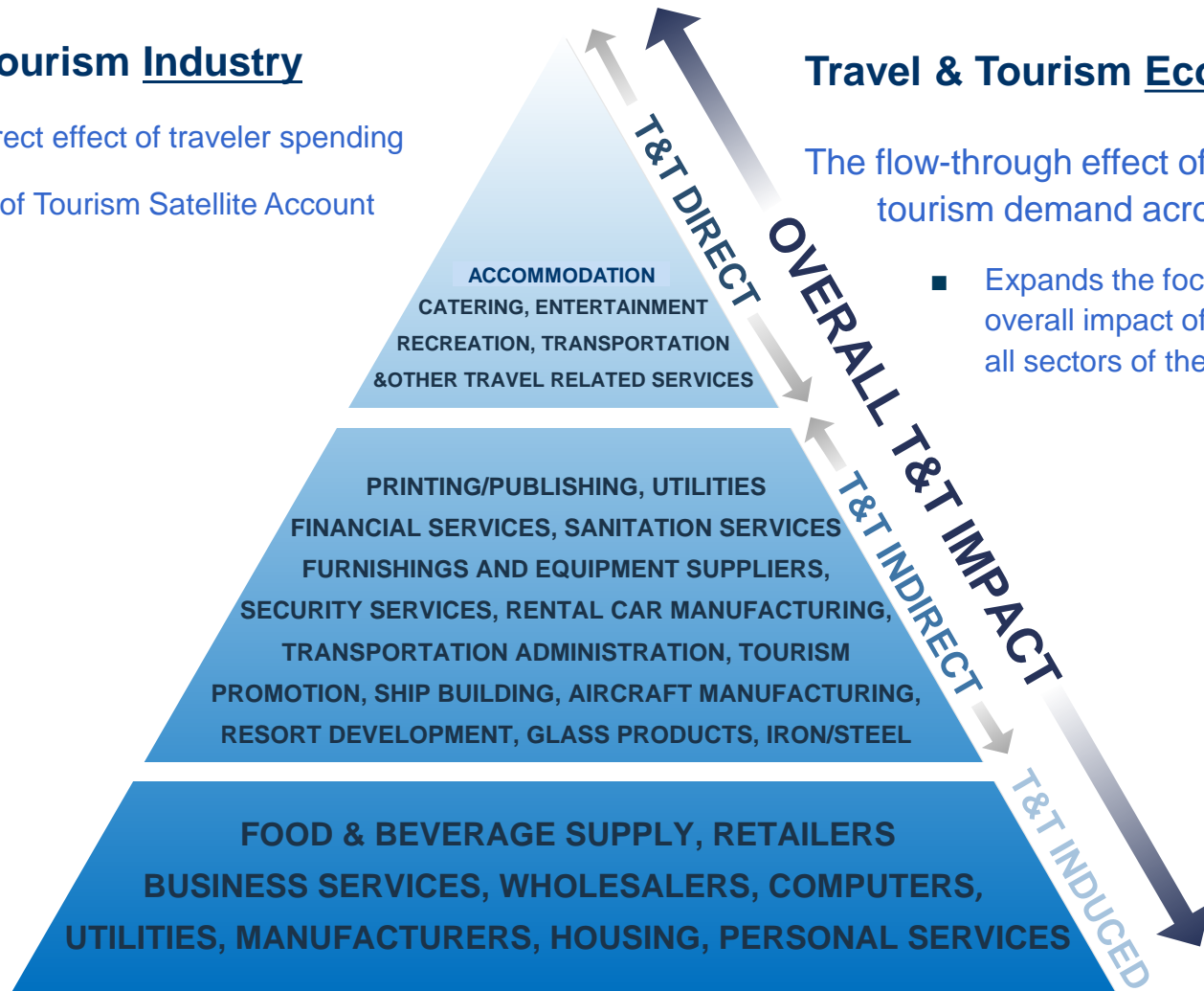
Travel & Tourism Industry

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

Travel & Tourism Economy

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

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



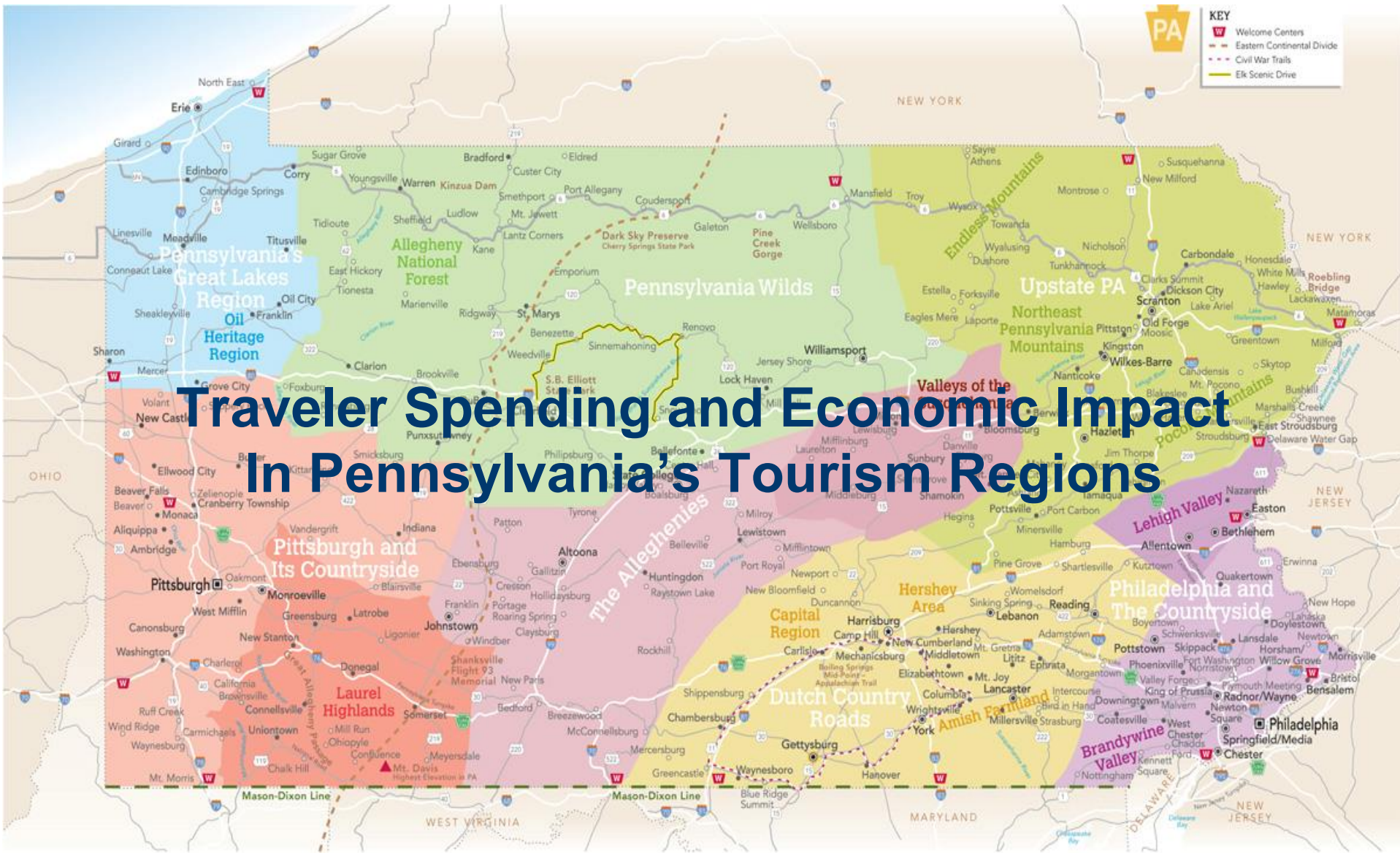
Pennsylvania's Tourism Regions

2016 Traveler Spending and Economic Impact By Region and County



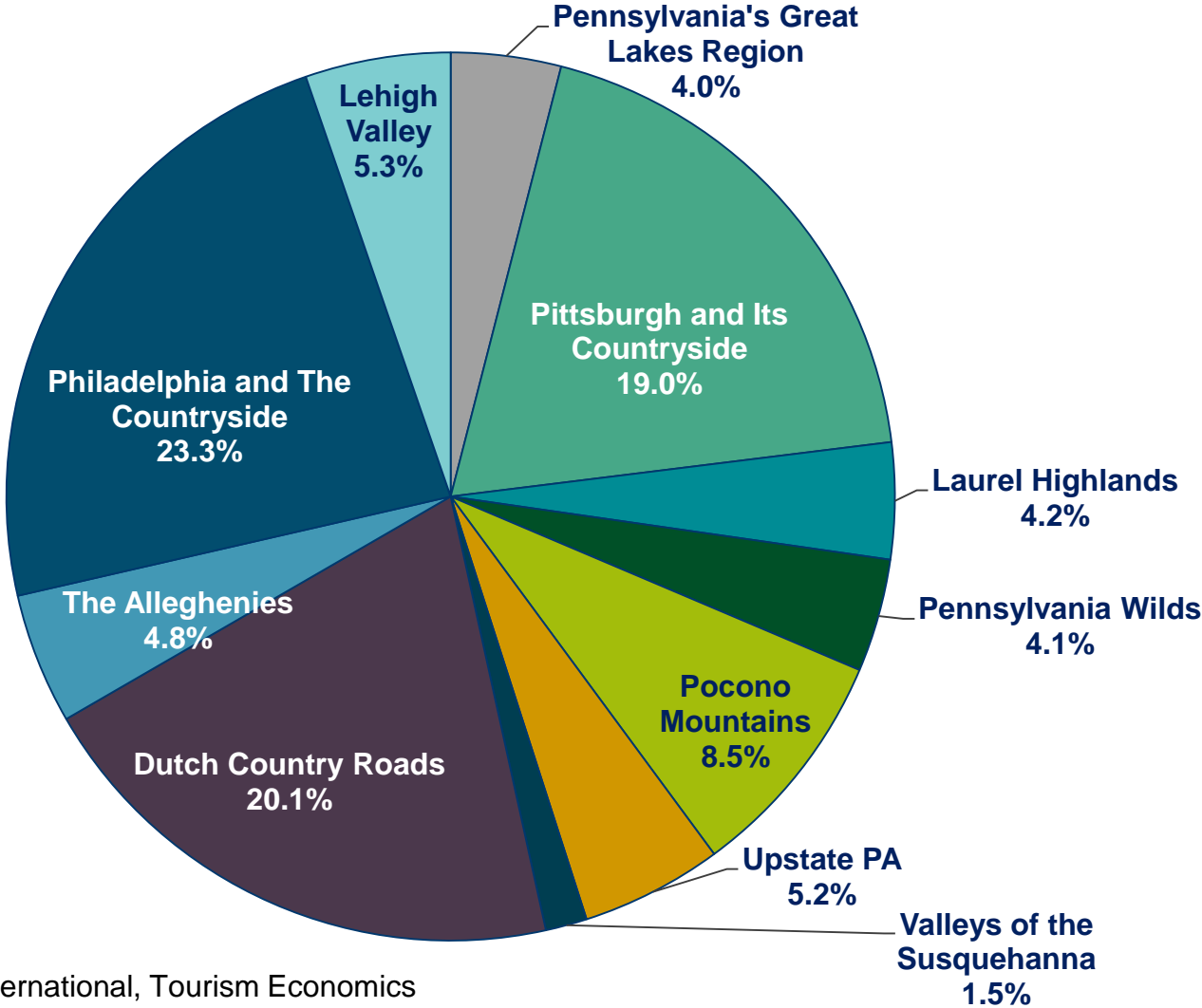
**TOURISM
ECONOMICS**

AN OXFORD ECONOMICS COMPANY



Percent of Traveler Spending by PA Region, 2016

Share of Total 2016 Visitor Spending in PA by Region

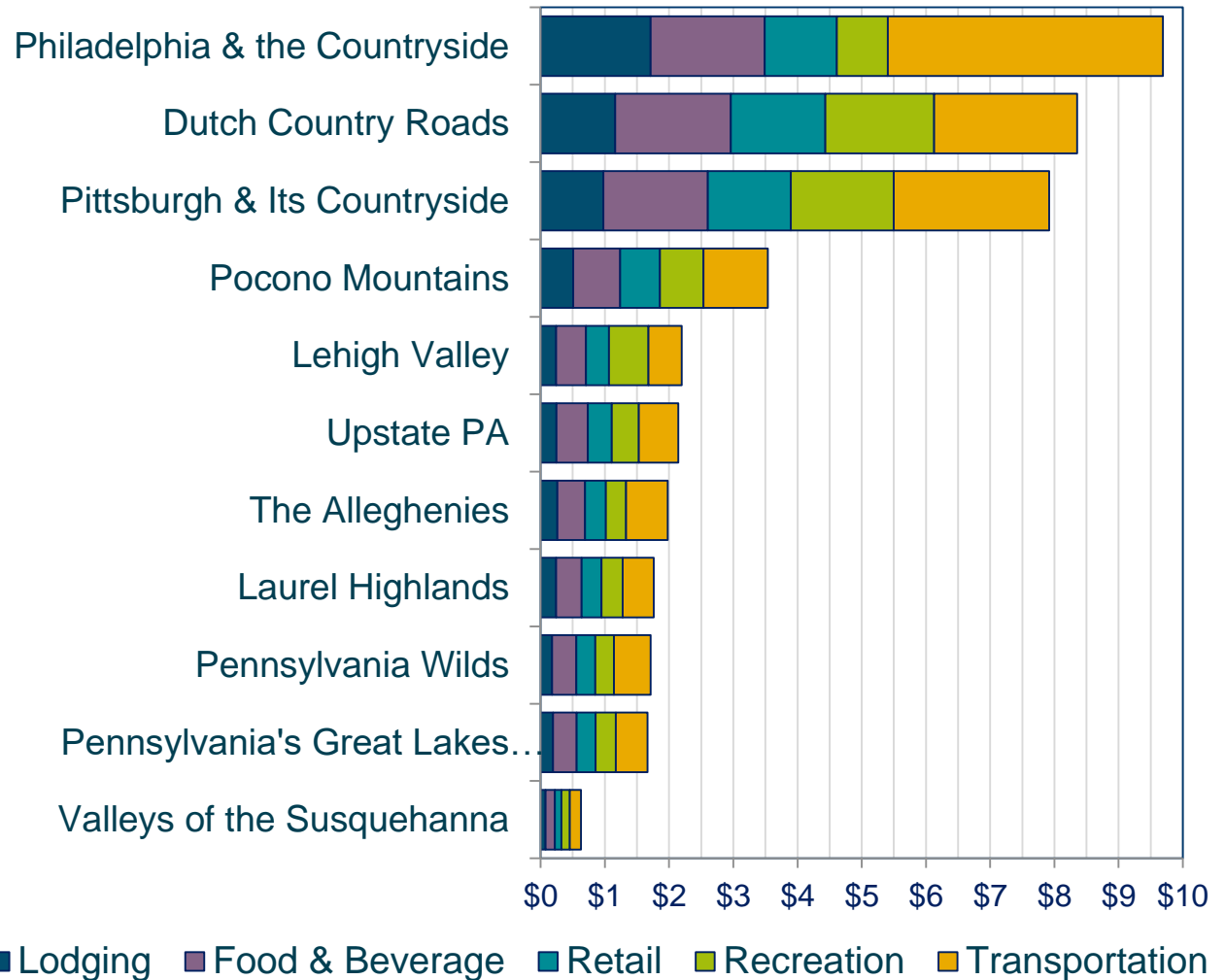


Source: Longwoods International, Tourism Economics

Traveler Spending in PA Regions by Category, 2016

- Over the past several years, travelers have devoted an increasing share of their travel budgets to recreation, with those visiting the Lehigh Valley, Valleys of the Susquehanna, Dutch Country Roads, and Pittsburgh regions spending 20% or more of their trip dollars on recreation in 2016.
- Travelers to the Philadelphia & Its Countryside region spent far more of their travel budgets on transportation than travelers to the state's other tourism regions.

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

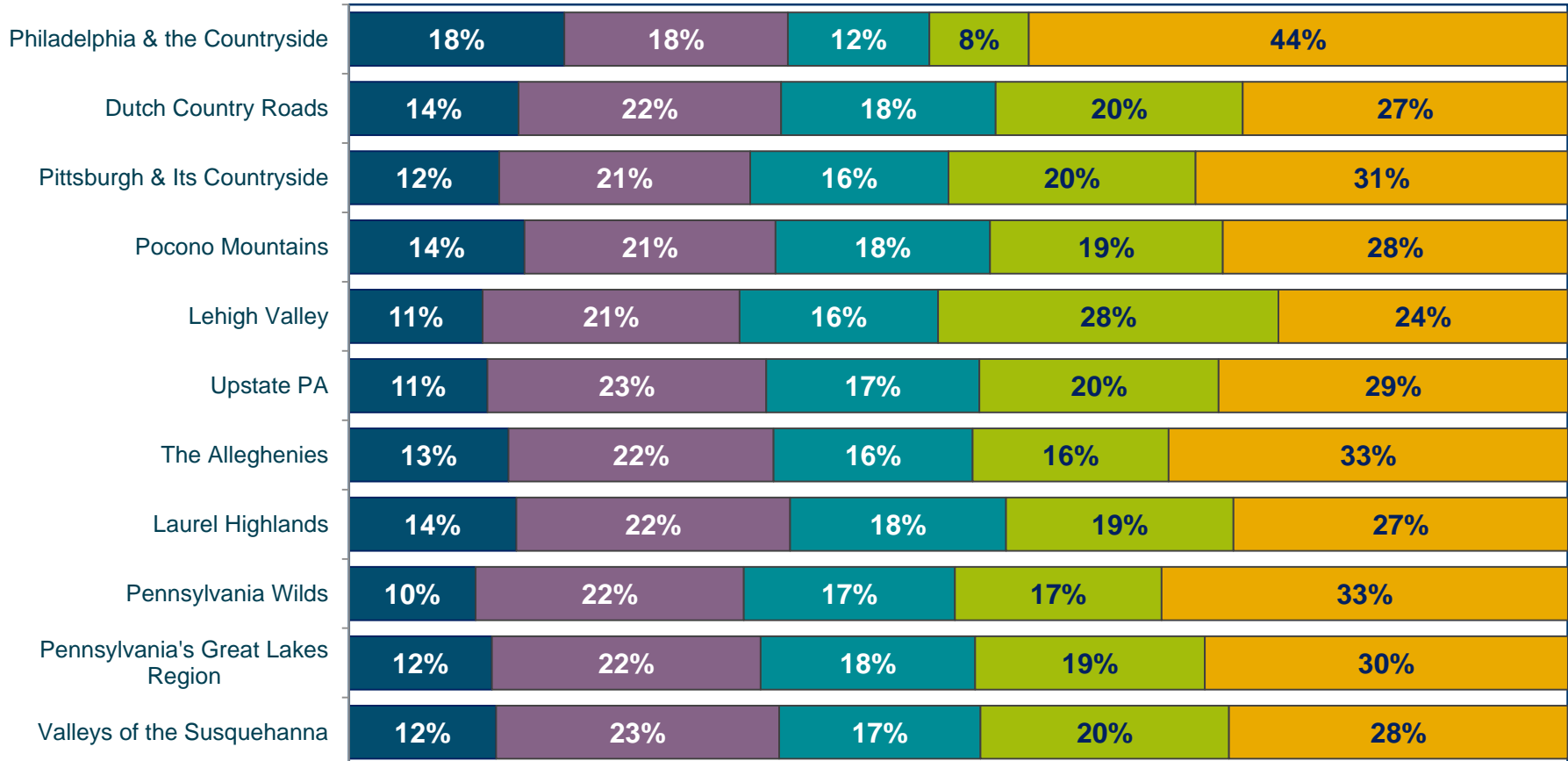


2016 Spending by Category -- % of Region Total

- While still capturing the largest share of traveler dollars, the share going to transportation costs once again dropped in each region in 2016 as a result of the decline in fuel costs.

2016 Traveler Spending by Category and Region

Percent of Region Total



■ Lodging
 ■ Food & Beverage
 ■ Retail
 ■ Recreation
 ■ Transportation

PA Total Travel ECONOMY Employment & Intensity, 2016

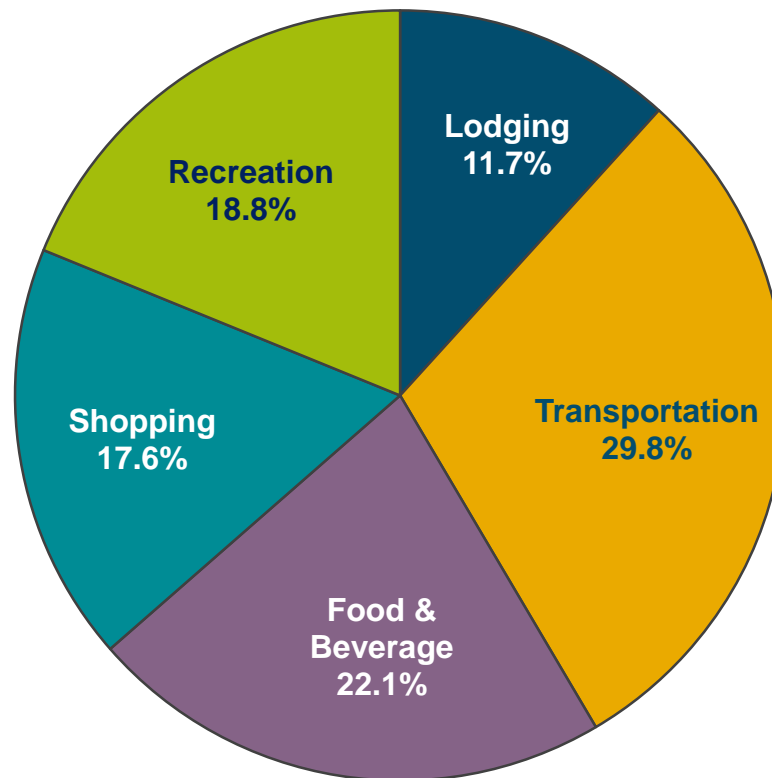
- Travel Employment Intensity is a measure of each county's reliance on the travel industry for jobs. As in prior years, the Philadelphia region had the highest number of travel-related jobs in 2016, but the Pocono Mountains region was by far the most dependent on the travel industry as a job provider, distantly followed by the Laurel Highlands and Pennsylvania Wilds regions.
- With its highly diverse economic base, the Philadelphia and its Countryside region was once again the least dependent on travel and tourism for jobs in the region.



Pennsylvania's Great Lakes Region

- Pennsylvania's Great Lakes region is comprised of Crawford, Erie, Mercer and Venango counties.
- Travelers spent close to \$1.67 billion in the region in 2016 – slightly below 2015's record high reflecting a small (0.8%) decrease from 2015.
- As in the two prior years, the region ranked 4th among the state's 11 tourism regions in the proportion of traveler dollars spent on food and beverage purchases in 2016.

Pennsylvania's Great Lakes Region 2016 Spending by Category

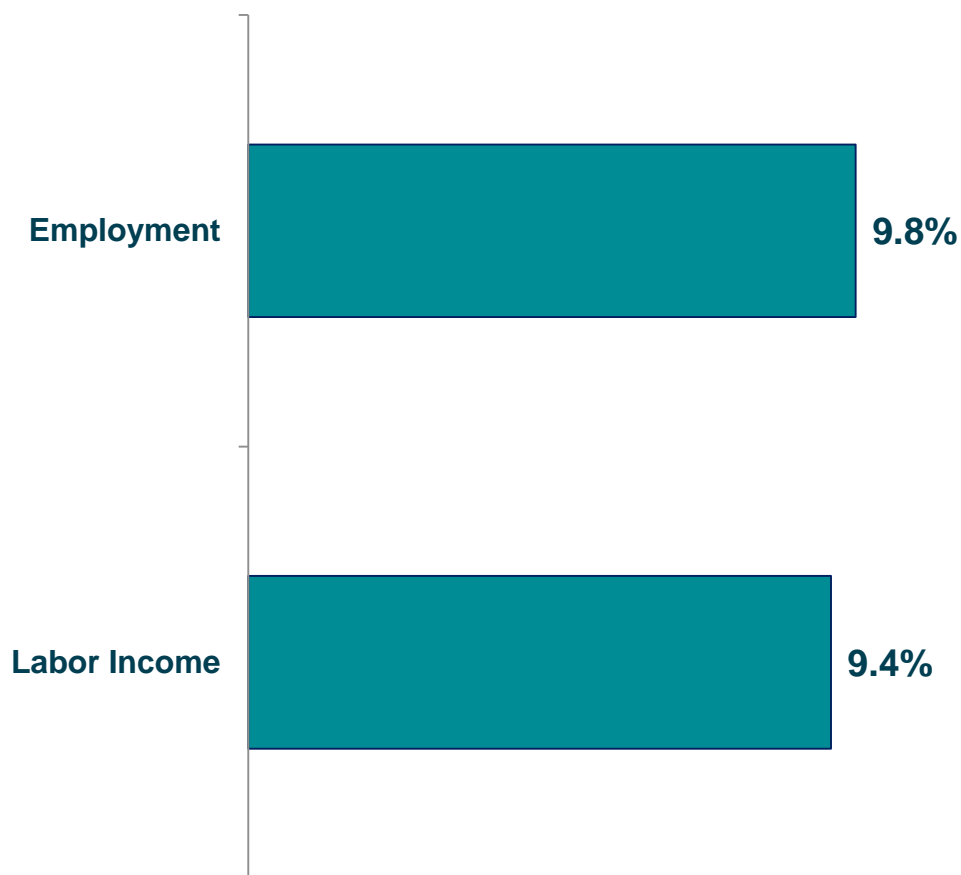


Source: Tourism Economics

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.
- Travel and tourism's share of the region's employment has shown steady growth over the past several years reaching 9.8% in 2016 compared to 9.2% in 2012.
- Pennsylvania's Great Lakes Region continued to rank 9th in the number of travel-supported jobs among PA's 11 tourism regions, but rose to 4th in employment intensity in 2016.

Travel Industry Share of Regional Economy



PA's Great Lakes Region – Traveler Spending & Employment Timelines

PENNSYLVANIA'S GREAT LAKES REGION TRAVELER SPENDING, 2006 – 2016 (dollar amounts in millions)

County	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Crawford	\$260.0	\$258.4	\$274.9	\$219.7	\$241.5	\$250.9	\$260.3	\$265.6	\$259.0	\$258.1	\$248.1
Erie	733.7	778.8	876.0	741.2	829.4	897.7	930.7	925.4	941.0	960.9	969.4
Mercer	241.1	243.2	279.8	233.2	256.0	279.8	304.9	319.9	315.9	315.4	307.4
Venango	116.1	118.7	130.2	108.7	118.3	123.0	132.1	130.9	132.5	144.9	140.3
Region Total	\$1,350.9	\$1,399.0	\$1,560.8	\$1,302.7	\$1,445.2	\$1,551.4	\$1,628.1	\$1,641.9	\$1,648.4	\$1,679.2	\$1,665.2
% Change	0.3%	3.6%	11.6%	-16.5%	10.9%	7.4%	4.9%	0.8%	0.4%	1.9%	-0.8%

PENNSYLVANIA'S GREAT LAKES REGION TRAVEL INDUSTRY EMPLOYMENT, 2006 – 2016

County	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Crawford	2,254	2,261	2,237	2,091	2,160	2,171	2,122	2,150	2,151	2,166	2,156
Erie	7,150	7,114	7,095	6,674	7,004	7,181	7,347	7,516	7,639	7,715	7,768
Mercer	2,571	2,537	2,513	2,343	2,417	2,485	2,557	2,614	2,640	2,627	2,584
Venango	1,146	1,171	1,191	1,113	1,138	1,153	1,143	1,158	1,166	1,188	1,196
Region Total	13,121	13,084	13,036	12,221	12,719	12,989	13,169	13,437	13,596	13,696	13,704
% Change	0.6%	-0.3%	-0.4%	-6.3%	4.1%	2.1%	1.4%	2.0%	1.2%	0.7%	0.1%

PA's Great Lakes Region – Traveler Spending by Category

PENNSYLVANIA'S GREAT LAKES REGION TRAVELER SPENDING BY CATEGORY, 2015 and 2016 (dollar amounts in millions)

2016	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Crawford	\$17.1	\$60.4	\$43.6	\$39.9	\$87.1	\$248.1
Erie	127.2	211.0	164.6	202.7	263.9	969.4
Mercer	39.9	72.0	63.7	52.7	79.1	307.4
Venango	11.0	23.8	21.1	18.4	65.9	140.3
Region Total	\$195.3	\$367.3	\$293.0	\$313.7	496.0	\$1,665.2
% Change	-0.4%	-0.1%	-0.5%	0.8%	-2.7%	-0.8%

2015	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Crawford	\$18.4	\$62.5	\$44.7	\$40.8	\$91.6	\$258.1
Erie	123.8	206.9	162.6	197.3	270.3	960.9
Mercer	41.9	73.4	65.2	52.8	82.0	315.4
Venango	11.9	25.0	21.9	20.1	66.0	144.9
Region Total	\$196.1	\$367.7	\$294.5	\$311.1	\$509.9	\$1,679.2

PA's Great Lakes Region – Tourism Satellite Account

PENNSYLVANIA'S GREAT LAKES REGION TOURISM SATELLITE ACCOUNT CATEGORIES, 2015 and 2016 (dollar amounts in millions)

2016	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Crawford	\$248.1	\$0.4	\$11.0	\$259.6
Erie	969.4	5.3	43.0	1,017.7
Mercer	307.4	0.9	13.6	321.9
Venango	140.3	0.2	6.2	146.7
Region Total	\$1,665.2	\$6.8	\$73.9	\$1,745.9
% Change	-0.8%	2.9%	-16.1%	-1.6%

2015	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Crawford	\$258.1	\$0.4	\$13.5	\$272.0
Erie	960.9	5.2	50.4	1,016.5
Mercer	315.4	0.8	16.6	332.8
Venango	144.9	0.2	7.6	152.7
Region Total	\$1,679.2	\$6.6	\$88.2	\$1,774.0

*Non-Traveler Personal Consumption Expenditures represent travel-related consumer durable purchases, such as an RV, boat, or furniture for a vacation home.

PA's Great Lakes Region – Travel Industry Impacts, 2015 & 2016

PENNSYLVANIA'S GREAT LAKES REGION TRAVEL INDUSTRY IMPACTS, 2015 and 2016 (dollar amounts in millions)

2016	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Crawford	\$248.1	2,156	\$50.9	\$13.0	\$11.9
Erie	969.4	7,768	207.1	55.2	47.7
Mercer	307.4	2,584	56.3	15.8	13.8
Venango	140.3	1,196	29.9	7.5	6.9
Region Total	\$1,665.2	13,704	\$344.2	\$91.4	\$80.3
% Change	-0.8%	0.1%	0.9%	-0.7%	1.3%

2015	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Crawford	\$258.1	2,166	\$51.5	\$13.4	\$12.1
Erie	960.9	7,715	203.3	54.8	46.5
Mercer	315.4	2,627	56.1	16.1	13.8
Venango	144.9	1,188	30.3	7.7	7.0
Region Total	\$1,679.2	13,696	\$341.2	\$92.1	\$79.3

PA's Great Lakes Region –Travel Economy Impacts, 2015 & 2016

PENNSYLVANIA'S GREAT LAKES REGION TRAVEL ECONOMY IMPACTS, 2015 and 2016 (dollar amounts in millions)

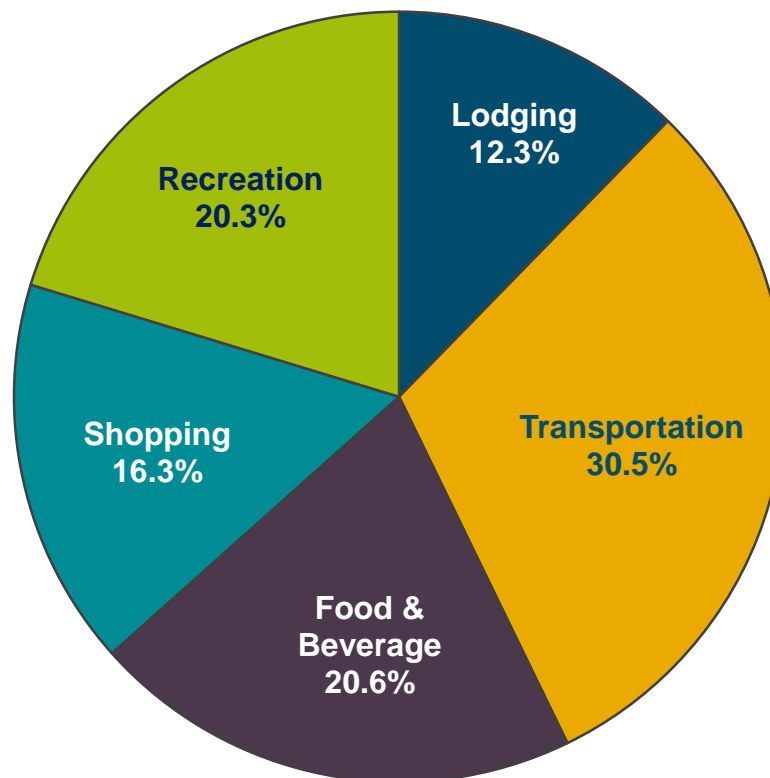
2016	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Crawford	\$259.6	3,445	\$99.7	\$22.9	\$24.0
Erie	1,017.7	12,017	403.8	94.5	96.0
Mercer	321.9	4,083	109.5	27.5	27.8
Venango	146.7	1,914	58.3	13.1	13.9
Region Total	\$1,745.9	21,459	\$671.4	\$158.1	\$161.7
% Change	-1.6%	0.2%	0.8%	-1.0%	1.3%

2015	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Crawford	\$272.0	3,456	\$107.6	\$23.7	\$24.3
Erie	1,016.5	11,923	396.6	94.1	93.6
Mercer	332.8	4,140	118.8	28.2	27.8
Venango	152.7	1,903	62.4	13.6	14.0
Region Total	\$1,774.0	21,422	\$685.3	\$159.6	\$159.6

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 \$7.9 billion in the region in 2016 - a 1.9% decrease from 2015. As in prior years, the region had the third highest level of traveler spending level of the state's 11 tourism regions.
- The region had the third highest share of traveler dollars spent on recreation and the fourth highest share spent on transportation among the state's tourism regions in 2016.

Pittsburgh and Its Countryside Region 2016 Spending by Category

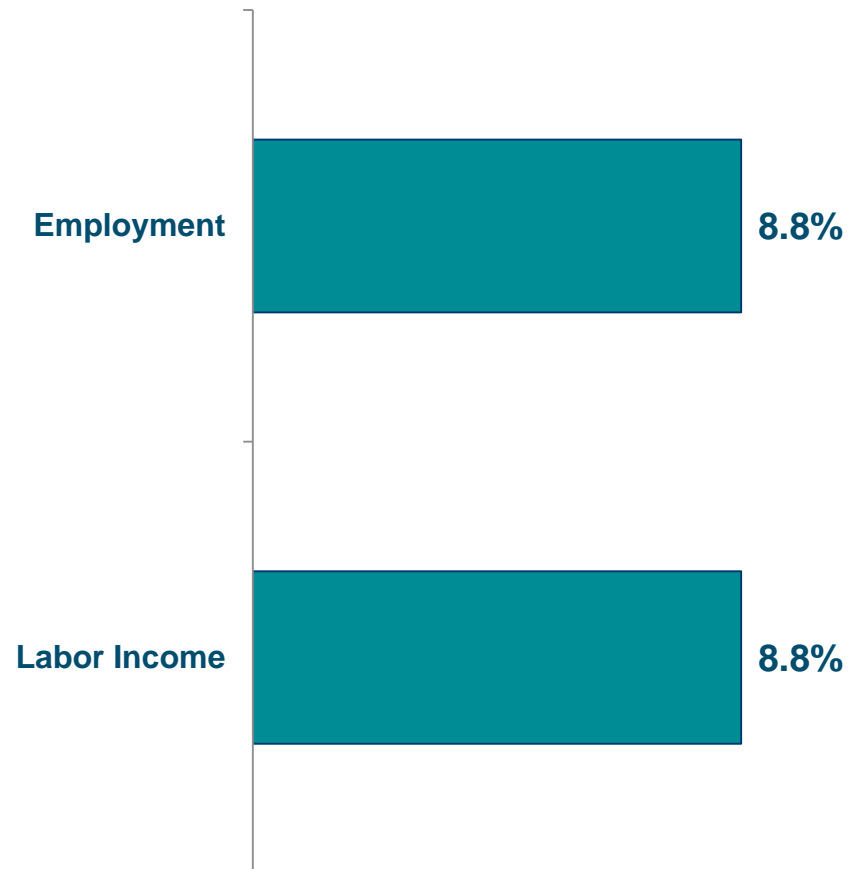


Source: Tourism Economics

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 8.8% in 2016, the same percentage as the industry's share of the region's employment base.
- As in prior years, the region had the 3rd highest number of travel-supported jobs of the state's 11 tourism regions and ranked 7th in the industry's employment intensity in 2016.

Travel Industry Share of Regional Economy



Pittsburgh & Its Countryside – Traveler Spending & Employment Timelines

PITTSBURGH AND ITS COUNTRYSIDE TRAVELER SPENDING, 2006 – 2016 (dollar amounts in millions)

County	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Allegheny	\$4,096.5	\$4,360.9	\$4,979.8	\$4,354.6	\$4,828.1	\$5,232.6	\$5,494.0	\$5,575.1	\$5,675.2	\$5,987.7	\$5,951.0
Armstrong	68.3	71.2	75.3	58.6	71.3	84.1	89.8	91.3	90.8	88.9	88.5
Beaver	185.0	197.6	226.9	196.0	217.2	237.5	244.9	249.8	256.2	267.0	270.5
Butler	377.9	406.5	455.5	406.1	440.6	485.9	578.8	582.1	597.3	604.2	592.1
Greene	56.4	60.8	65.3	58.7	68.9	73.8	80.4	91.9	94.7	89.2	76.1
Indiana	124.7	135.3	152.6	144.5	154.2	169.8	184.3	179.1	175.3	162.0	155.4
Lawrence	92.0	95.0	101.4	83.7	98.6	113.5	118.9	117.9	119.6	120.1	120.2
Washington	415.0	451.2	497.1	482.3	582.7	668.7	740.7	755.3	760.0	747.0	662.7
Region Total	\$5,415.8	\$5,778.4	\$6,554.1	\$5,784.5	\$6,461.7	\$7,065.9	\$7,531.8	\$7,642.5	\$7,769.2	\$8,066.0	7,916.4
% Change	1.9%	6.7%	13.4%	-11.7%	11.7%	9.4%	6.6%	1.5%	1.7%	3.8%	-1.9%

PITTSBURGH AND ITS COUNTRYSIDE TRAVEL INDUSTRY EMPLOYMENT, 2006 – 2016

County	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Allegheny	35,650	36,767	37,591	36,188	37,302	38,112	39,094	39,964	40,254	40,888	41,529
Armstrong	525	517	530	484	554	559	568	573	576	584	594
Beaver	2,106	2,125	2,109	1,977	1,965	1,975	1,997	2,048	2,070	2,096	2,111
Butler	3,708	3,789	3,739	3,664	3,740	3,828	3,941	3,996	4,050	4,048	4,074
Greene	400	410	417	419	479	479	483	485	488	487	483
Indiana	1,297	1,320	1,342	1,347	1,351	1,381	1,427	1,450	1,460	1,426	1,421
Lawrence	842	854	863	806	873	877	896	907	917	909	927
Washington	4,824	4,877	4,995	5,026	5,570	5,740	5,840	5,949	5,953	5,948	5,856
Region Total	49,353	50,658	51,586	49,911	51,834	52,952	54,246	55,374	55,767	56,388	56,994
% Change	0.6%	2.6%	1.8%	-3.2%	3.9%	2.2%	2.4%	2.1%	0.7%	1.1%	1.1%

Pittsburgh & Its Countryside – Traveler Spending by Category

PITTSBURGH AND ITS COUNTRYSIDE TRAVELER SPENDING BY CATEGORY, 2015 and 2016 (dollar amounts in millions)

2016	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Allegheny	\$766.8	\$1,202.4	\$953.1	\$1,195.4	\$1,833.3	\$5,951.0
Armstrong	3.8	17.6	11.8	26.2	29.0	88.5
Beaver	19.7	57.7	44.1	43.1	105.9	270.5
Butler	81.0	132.4	110.3	101.1	167.3	592.1
Greene	9.4	17.6	12.6	12.0	24.4	76.1
Indiana	17.2	38.1	28.9	26.5	44.8	155.4
Lawrence	7.5	28.3	23.9	23.3	37.2	120.2
Washington	71.3	135.0	103.4	176.6	176.2	662.7
Region Total	\$976.7	\$1,629.2	\$1,288.2	\$1,604.3	\$2,418.1	\$7,916.4
% Change	-3.4%	-0.7%	-1.1%	1.8%	-4.7%	-1.9%

2015	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Allegheny	\$777.0	\$1,195.1	\$949.7	\$1,156.6	\$1,916.3	\$5,987.7
Armstrong	4.0	17.5	11.8	25.8	29.9	88.9
Beaver	19.1	56.5	43.8	41.9	105.8	267.0
Butler	84.2	133.7	111.4	100.1	174.7	604.2
Greene	13.0	20.3	15.0	13.8	27.0	89.2
Indiana	18.4	38.9	29.7	27.2	48.0	162.0
Lawrence	7.5	27.9	23.6	23.7	37.4	120.1
Washington	94.5	151.2	117.2	186.2	197.9	747.0
Region Total	\$1,010.6	\$1,641.0	\$1,302.2	\$1,575.3	\$2,537.0	\$8,066.0

Pittsburgh & Its Countryside – Tourism Satellite Account

PITTSBURGH AND ITS COUNTRYSIDE TOURISM SATELLITE ACCOUNT CATEGORIES, 2015 and 2016 (dollar amounts in millions)

2016	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Allegheny	\$5,951.0	\$38.0	\$264.2	\$6,253.2
Armstrong	88.5	0.1	3.9	92.5
Beaver	270.5	0.5	12.0	283.0
Butler	592.1	2.2	26.3	620.6
Greene	76.1	0.2	3.4	79.7
Indiana	155.4	0.5	6.9	162.8
Lawrence	120.2	0.2	5.3	125.8
Washington	662.7	1.7	29.4	693.7
Region Total	7,916.4	\$43.5	\$351.5	\$8,311.4
% Change	-1.9%	2.0%	-17.0%	-2.6%

2015	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Allegheny	\$5,987.7	\$37.2	\$314.4	\$6,339.3
Armstrong	88.9	0.1	4.7	93.7
Beaver	267.0	0.5	14.0	281.5
Butler	604.2	1.8	31.7	637.7
Greene	89.2	0.3	4.7	94.1
Indiana	162.0	0.4	8.5	170.9
Lawrence	120.1	0.2	6.3	126.6
Washington	747.0	2.1	39.2	788.3
Region Total	\$8,066.0	\$42.6	\$423.5	\$8,532.2

*Non-Traveler Personal Consumption Expenditures represent travel-related consumer durable purchases, such as an RV, boat, or furniture for a vacation home.

Pittsburgh & Its Countryside – Travel Industry Impacts, 2015 & 2016

PITTSBURGH AND ITS COUNTRYSIDE TRAVEL INDUSTRY IMPACTS, 2015 and 2016 (dollar amounts in millions)

2016	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Allegheny	\$5,951.0	41,529	\$1,585.0	\$373.7	\$335.6
Armstrong	88.5	594	15.0	4.3	3.8
Beaver	270.5	2,111	60.0	14.6	13.6
Butler	592.1	4,074	110.1	31.2	26.9
Greene	76.1	483	11.5	3.7	3.1
Indiana	155.4	1,421	33.3	8.5	7.7
Lawrence	120.2	927	24.4	6.3	5.7
Washington	662.7	5,856	178.2	39.2	37.6
Region Total	7,916.4	56,994	\$2,017.5	\$481.5	\$433.9
% Change	-1.9%	1.1%	2.3%	-0.6%	1.8%

2015	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Allegheny	\$5,987.7	40,888	\$1,542.7	\$372.5	\$327.2
Armstrong	88.9	584	14.6	4.3	3.7
Beaver	267.0	2,096	58.7	14.5	13.2
Butler	604.2	4,048	108.8	31.2	26.6
Greene	89.2	487	11.7	4.2	3.3
Indiana	162.0	1,426	33.4	8.7	7.7
Lawrence	120.1	909	23.7	6.3	5.6
Washington	747.0	5,948	178.9	42.6	39.0
Region Total	\$8,066.0	56,388	\$1,972.6	\$484.3	\$426.4

Pittsburgh & Its Countryside – Travel Economy Impacts, 2015 & 2016

PITTSBURGH AND ITS COUNTRYSIDE TRAVEL ECONOMY IMPACTS, 2015 and 2016 (dollar amounts in millions)

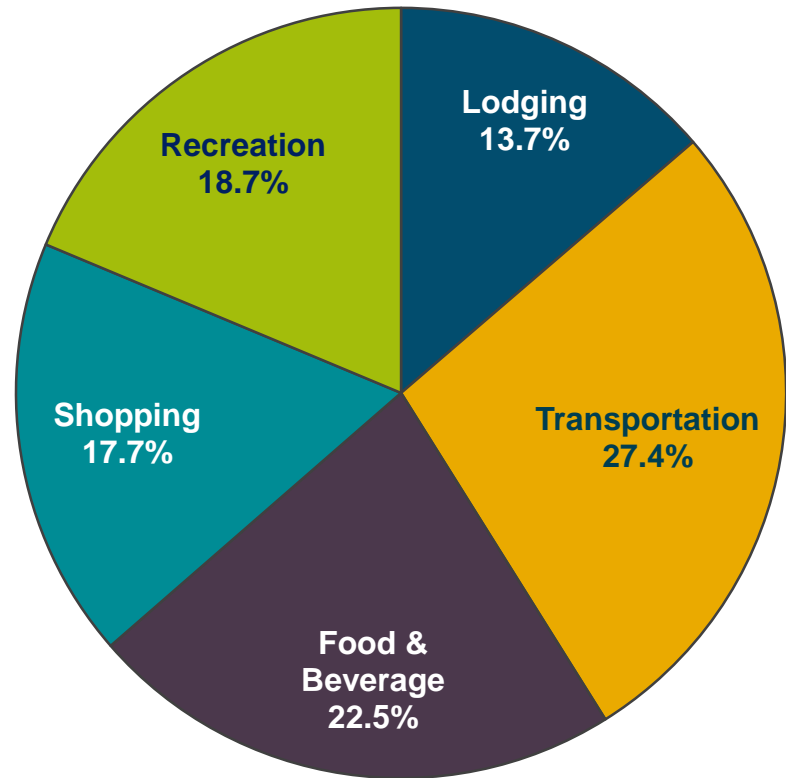
2016	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Allegheny	\$6,253.2	62,397	\$3,075.6	\$639.2	\$676.7
Armstrong	92.5	1,191	28.8	7.6	7.7
Beaver	283.0	3,700	116.9	25.8	27.4
Butler	620.6	6,468	215.6	53.9	54.1
Greene	79.7	863	21.8	6.4	6.2
Indiana	162.8	2,380	65.5	14.8	15.4
Lawrence	125.8	1,725	47.3	11.1	11.5
Washington	693.7	9,028	346.8	68.9	75.8
Region Total	\$8,311.4	87,753	\$3,918.3	\$827.7	\$874.8
% Change	-2.6%	1.2%	1.8%	-0.8%	1.8%

2015	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Allegheny	\$6,339.3	61,384	\$3,011.7	\$638.5	\$660.0
Armstrong	93.7	1,175	28.5	7.6	7.5
Beaver	281.5	3,676	114.6	25.6	26.6
Butler	637.7	6,409	212.4	54.5	53.5
Greene	94.1	883	22.9	7.3	6.7
Indiana	170.9	2,382	65.1	15.2	15.5
Lawrence	126.6	1,703	46.3	11.0	11.2
Washington	788.3	9,130	349.3	74.8	78.6
Region Total	\$8,532.2	86,741	\$3,850.8	\$834.5	\$859.7

Laurel Highlands

- The Laurel Highlands in southwestern PA is comprised of the following counties: Fayette, Somerset, and Westmorland.
- Travelers spent \$1.76 billion in the region in 2016 – down 3.3% overall from 2015. The decrease was broadly based with every spending category showing a decrease.
- The region had the second highest share of travelers' trip budgets spent on food & beverage purchases and fourth in the share of travel budgets spent on lodging among the state's 11 tourism regions.

Laurel Highlands Region 2016 Spending by Category

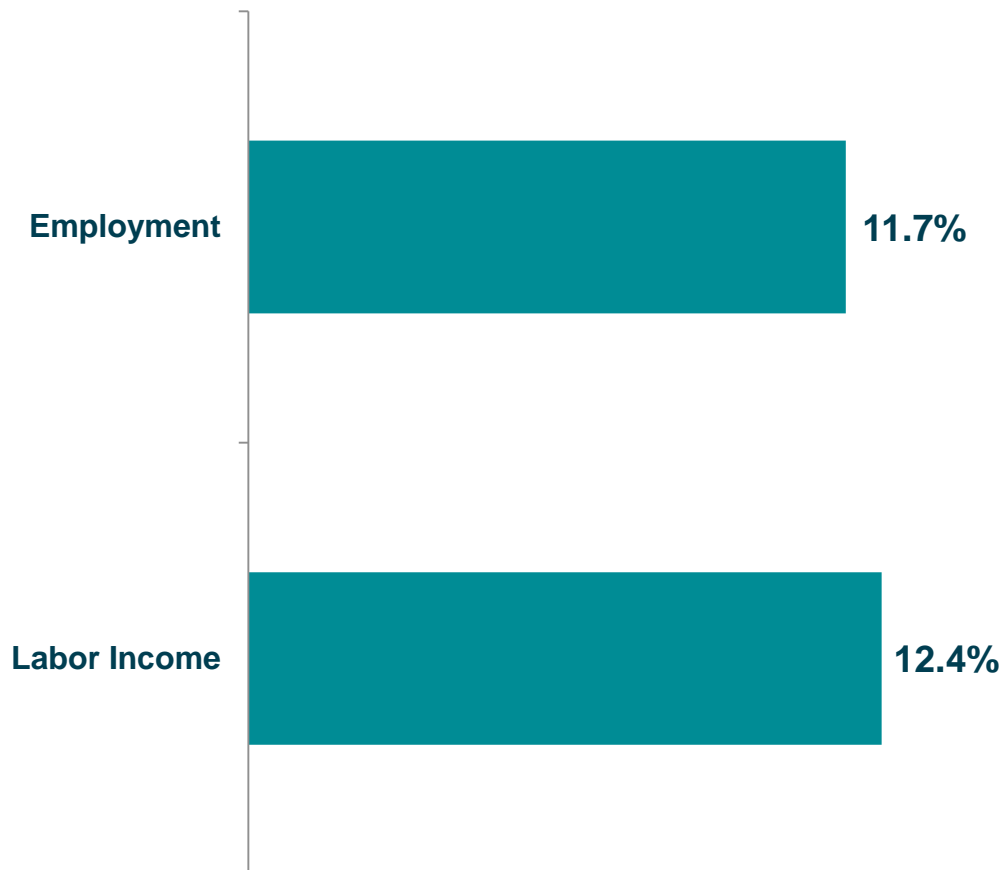


Source: Tourism Economics

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 supported 11.7% of the region's total job count – a slight increase (0.1 percentage point) from the previous two years. The region continued to have the second highest percentage of travel-supported jobs among the state's 11 tourism regions, while ranking 7th in the actual number of travel-supported jobs.
- The travel industry's share of the Laurel Highlands region total labor income was 12.4% in 2016 – a small increase from 2015.

Travel Industry Share of Regional Economy



Laurel Highlands – Traveler Spending & Employment Timelines

LAUREL HIGHLANDS TRAVELER SPENDING, 2006 – 2016 (dollar amounts in millions)

County	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Fayette	\$562.1	\$563.6	\$618.4	\$538.2	\$595.7	\$636.1	\$643.9	\$663.8	\$677.5	\$667.2	\$661.8
Somerset	309.6	325.2	357.2	306.9	330.1	371.2	378.7	380.2	387.7	399.9	377.4
Westmoreland	621.0	623.5	706.4	587.6	651.6	724.9	745.9	742.6	772.2	753.9	721.3
Region Total	\$1,492.8	\$1,512.2	\$1,682.0	\$1,432.6	\$1,577.3	\$1,732.2	\$1,768.5	\$1,786.6	\$1,837.4	\$1,821.1	\$1,760.5
% Change	1.2%	1.3%	11.2%	-14.8%	10.1%	9.8%	2.1%	1.0%	2.8%	-0.9%	-3.3%

LAUREL HIGHLANDS TRAVEL INDUSTRY EMPLOYMENT, 2006 – 2016

County	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Fayette	5,273	5,272	5,241	5,047	5,219	5,295	5,417	5,808	5,836	5,834	5,852
Somerset	3,449	3,431	3,449	3,255	3,234	3,257	3,193	3,285	3,331	3,322	3,233
Westmoreland	5,510	5,539	5,582	5,243	5,369	5,476	5,632	5,716	5,764	5,661	5,649
Region Total	14,232	14,242	14,272	13,544	13,822	14,028	14,242	14,809	14,932	14,817	14,734
% Change	-0.1%	0.1%	0.2%	-5.1%	2.1%	1.5%	1.5%	4.0%	0.8%	-0.8%	-0.6%

Laurel Highlands – Traveler Spending by Category

LAUREL HIGHLANDS TRAVELER SPENDING BY CATEGORY, 2015 and 2016 (dollar amounts in millions)

2016	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Fayette	\$117.9	\$149.6	\$111.2	\$129.5	\$153.6	\$661.8
Somerset	52.8	86.3	62.3	68.4	107.7	377.4
Westmoreland	71.2	159.4	138.4	130.6	221.6	721.3
Region Total	\$241.9	\$395.4	\$311.9	\$328.5	\$482.9	\$1,760.5
% Change	-4.3%	-2.1%	-3.6%	-2.2%	-4.5%	-3.3%

2015	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Fayette	\$116.1	\$148.4	\$115.0	\$129.1	\$158.7	\$667.2
Somerset	57.8	89.8	66.0	71.5	114.9	399.9
Westmoreland	78.7	165.5	142.4	135.4	231.9	753.9
Region Total	\$252.6	\$403.7	\$323.4	\$335.9	\$505.4	\$1,821.1

Laurel Highlands – Tourism Satellite Account

LAUREL HIGHLANDS TOURISM SATELLITE ACCOUNT CATEGORIES, 2015 and 2016 (dollar amounts in millions)

2016	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Fayette	\$661.8	\$1.5	\$29.4	\$692.6
Somerset	377.4	1.0	16.8	395.1
Westmoreland	721.3	1.9	32.0	755.2
Region Total	\$1,760.5	\$4.3	\$78.2	\$1,843.0
% Change	-3.3%	7.5%	-18.2%	-4.0%

2015	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Fayette	\$667.2	\$1.4	\$35.0	\$703.6
Somerset	399.9	1.0	21.0	421.9
Westmoreland	753.9	1.6	39.6	795.1
Region Total	\$1,821.1	\$4.0	\$95.6	\$1,920.7

*Non-Traveler Personal Consumption Expenditures represent travel-related consumer durable purchases, such as an RV, boat, or furniture for a vacation home.

Laurel Highlands – Travel Industry Impacts, 2015 & 2016

LAUREL HIGHLANDS TRAVEL INDUSTRY IMPACTS, 2015 and 2016 (dollar amounts in millions)

2016	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Fayette	\$661.8	5,852	\$170.7	\$38.3	\$36.6
Somerset	377.4	3,233	88.7	22.1	19.7
Westmoreland	721.3	5,649	139.7	37.6	33.5
Region Total	\$1,760.5	14,734	\$399.0	\$97.0	\$89.7
% Change	-3.3%	-0.6%	0.4%	-2.2%	0.0%

2015	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Fayette	\$667.2	5,834	\$170.0	\$38.5	\$36.2
Somerset	399.9	3,322	89.1	22.1	20.0
Westmoreland	753.9	5,661	138.4	38.6	33.6
Region Total	\$1,821.1	14,817	\$397.5	\$99.2	\$89.7

Laurel Highlands – Travel Economy Impacts, 2015 & 2016

LAUREL HIGHLANDS TRAVEL ECONOMY IMPACTS, 2015 and 2016 (dollar amounts in millions)

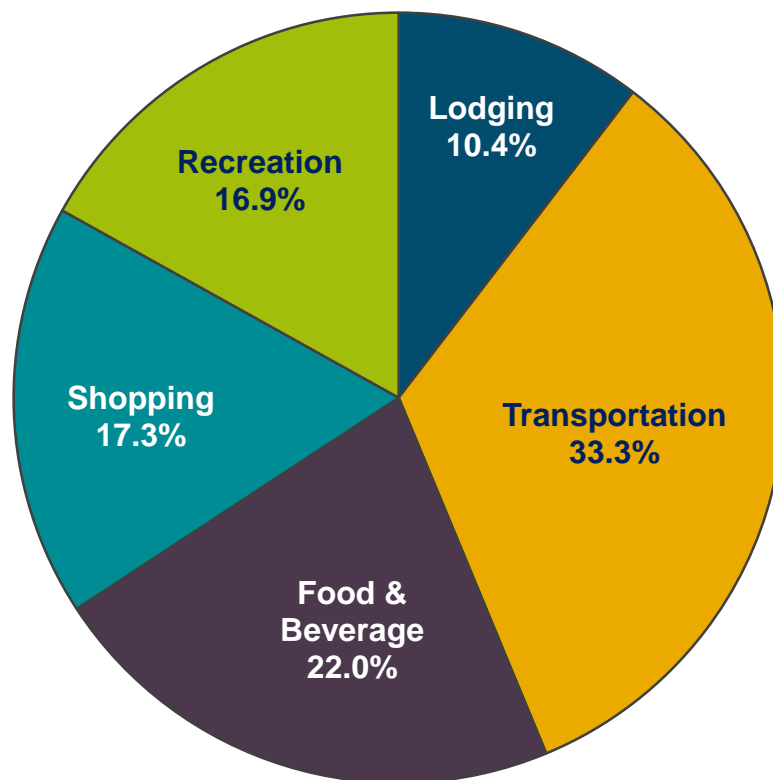
2016	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Fayette	\$692.6	8,417	\$332.4	\$67.4	\$73.7
Somerset	395.1	4,808	173.3	37.1	39.6
Westmoreland	755.2	9,643	273.2	65.8	67.4
Region Total	\$1,843.0	22,869	\$778.9	\$170.2	\$180.7
% Change	-4.0%	-0.2%	0.4%	-2.5%	0.0%

2015	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Fayette	\$703.6	8,373	\$331.8	\$68.0	\$73.0
Somerset	421.9	4,922	174.0	38.8	40.2
Westmoreland	795.1	9,613	270.2	67.8	67.6
Region Total	\$1,920.7	22,908	\$776.0	\$174.6	\$180.8

Pennsylvania Wilds

- The Pennsylvania Wilds region is comprised of the following northern tier counties: Cameron, Clarion, Clearfield, Clinton, Elk, Forest, Jefferson, Lycoming, McKean, Potter, Tioga, and Warren.
- Travelers spent more than \$1.7 billion in the Pennsylvania Wilds region in 2016 – a 1.4% decrease from 2015.
- As in prior years, the region had the second highest proportion of travelers' trip budgets spent on transportation in 2016 among the state's 11 tourism regions. The region also had the smallest proportion of trip dollars spent on lodging.

Pennsylvania Wilds Region 2016 Spending by Category

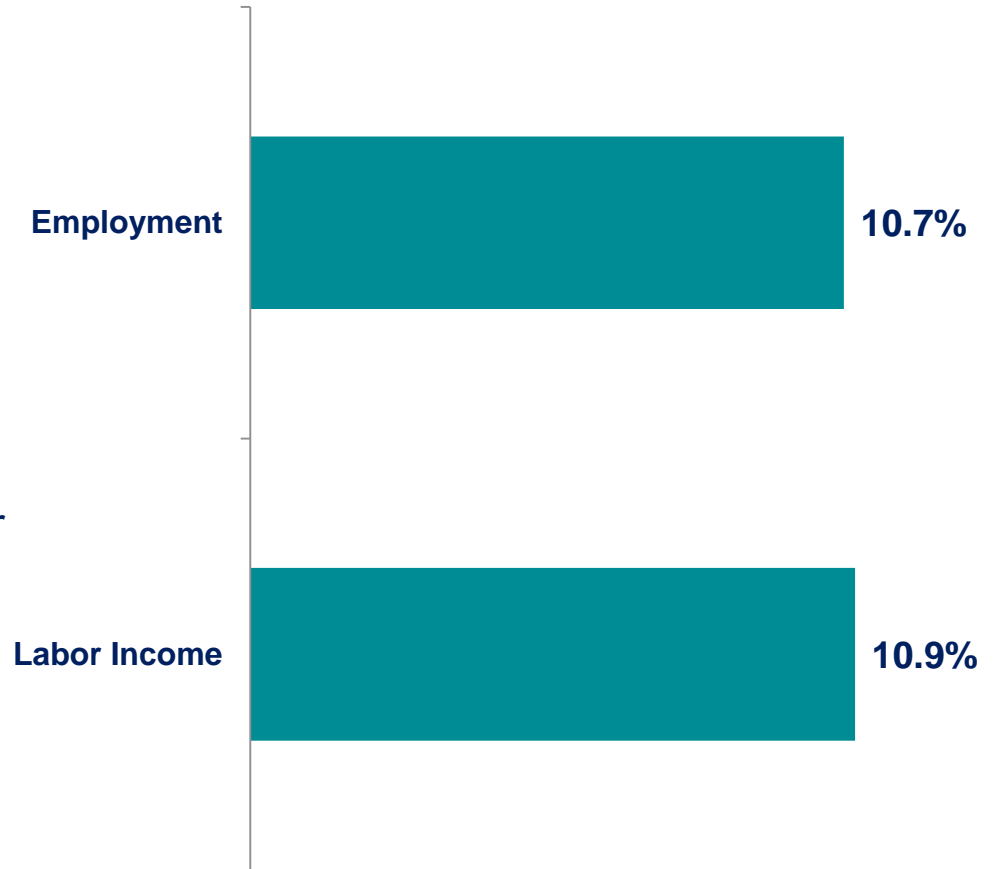


Source: Tourism Economics

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.
- As in prior years, the region continued to rank tenth among the state's 11 tourism regions in the number of travel-supported jobs, but third in the industry's employment intensity in 2016.
- The travel industry was responsible for 10.9% of the labor income earned in the Pennsylvania Wilds region in 2016 – a proportion that was above the industry's share of the region's employment.

Travel Industry Share of Regional Economy



Pennsylvania Wilds – Traveler Spending Timeline

PENNSYLVANIA WILDS TRAVELER SPENDING, 2006 – 2016 (dollar amounts in millions)

County	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Cameron	\$7.9	\$8.4	\$9.3	\$7.8	\$9.0	\$9.5	\$9.6	\$9.6	\$9.4	\$9.7	\$10.1
Clarion	94.3	101.7	112.0	93.5	108.1	112.5	118.6	121.5	115.4	117.7	118.9
Clearfield	227.5	233.5	250.3	212.3	248.9	261.8	264.3	265.5	276.5	270.0	266.2
Clinton	108.9	111.1	123.2	108.0	136.6	151.4	153.9	150.6	147.5	147.7	140.6
Elk	47.8	51.5	57.9	47.2	52.3	61.4	66.1	66.0	69.3	74.7	78.0
Forest	18.6	19.7	21.2	18.5	20.4	23.7	22.6	23.4	23.2	27.0	26.3
Jefferson	90.3	92.6	97.8	82.2	102.9	109.9	113.6	115.1	115.1	119.1	116.0
Lycoming	241.5	255.6	293.1	269.3	308.7	384.4	398.2	405.9	391.3	382.5	370.6
McKean	120.0	126.1	138.9	123.2	158.9	164.0	173.4	174.5	174.7	174.7	171.8
Potter	25.1	26.6	29.3	27.0	30.1	36.6	34.3	34.5	35.4	38.8	37.7
Tioga	139.5	149.1	159.1	139.5	171.2	192.3	193.4	187.6	190.9	195.2	193.3
Warren	127.9	137.0	157.8	137.7	149.3	162.5	169.4	169.3	173.8	178.6	182.3
Region Total	\$1,249.3	\$1,312.9	\$1,450.1	\$1,266.2	\$1,496.4	\$1,670.0	\$1,717.3	\$1,723.4	\$1,722.4	\$1,735.7	\$1,711.7
% Change	1.5%	5.1%	10.4%	-12.7%	18.2%	11.6%	2.8%	0.4%	-0.1%	0.8%	-1.4%

Pennsylvania Wilds – Employment Timeline

PENNSYLVANIA WILDS TRAVEL INDUSTRY EMPLOYMENT, 2006 – 2016

County	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Cameron	76	78	79	73	74	75	75	76	76	76	77
Clarion	952	947	963	899	972	993	1,022	1,046	1,051	1,071	1,110
Clearfield	1,553	1,594	1,623	1,594	1,770	1,793	1,775	1,778	1,817	1,799	1,812
Clinton	802	818	835	798	952	990	993	1,040	1,045	1,064	1,069
Elk	494	495	496	462	488	509	531	554	557	573	591
Forest	125	129	131	124	135	136	137	137	138	138	139
Jefferson	714	719	732	683	747	762	785	804	807	821	816
Lycoming	2,497	2,553	2,573	2,538	2,707	2,790	2,901	2,973	2,961	2,952	2,930
McKean	988	1,008	997	943	1,112	1,130	1,114	1,138	1,144	1,164	1,172
Potter	188	193	197	195	206	216	229	241	242	246	245
Tioga	1,260	1,250	1,253	1,215	1,387	1,451	1,462	1,530	1,535	1,573	1,623
Warren	1,123	1,142	1,154	1,123	1,133	1,149	1,120	1,141	1,147	1,156	1,167
Region Total	10,772	10,926	11,032	10,648	11,684	11,993	12,142	12,456	12,519	12,632	12,751
% Change	0.4%	1.4%	1.0%	-3.5%	9.7%	2.6%	1.2%	2.6%	0.5%	0.9%	0.9%

Pennsylvania Wilds – 2016 Traveler spending by category

PENNSYLVANIA WILDS TRAVELER SPENDING BY CATEGORY, 2016 (dollar amounts in millions)

2016	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Cameron	\$0.7	\$1.9	\$1.8	\$2.6	\$3.2	\$10.1
Clarion	14.7	26.9	21.4	22.3	33.6	118.9
Clearfield	26.5	58.2	51.1	43.7	86.8	266.2
Clinton	12.1	31.8	22.9	24.7	49.1	140.6
Elk	10.0	19.1	14.6	13.3	20.9	78.0
Forest	4.0	5.5	5.4	4.7	6.7	26.3
Jefferson	8.6	21.2	16.9	20.8	48.4	116.0
Lycoming	47.0	88.5	63.9	57.2	114.1	370.6
McKean	17.8	35.6	26.9	28.3	63.2	171.8
Potter	5.4	7.9	6.5	6.8	11.0	37.7
Tioga	22.6	43.1	33.8	34.8	59.0	193.3
Warren	8.8	36.7	31.4	30.8	74.5	182.3
Region Total	\$178.0	\$376.5	\$296.6	\$290.1	\$570.6	\$1,711.7
% Change	-5.3%	-0.4%	-0.2%	1.0%	-2.5%	-1.4%

Pennsylvania Wilds – 2015 Traveler spending by category

PENNSYLVANIA WILDS TRAVELER SPENDING BY CATEGORY, 2015 (dollar amounts in millions)

2015	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Cameron	\$0.6	\$1.8	\$1.7	\$2.5	\$3.1	\$9.7
Clarion	14.5	26.6	21.3	21.4	33.9	117.7
Clearfield	28.5	58.3	50.7	43.4	89.0	270.0
Clinton	14.1	33.1	23.6	25.6	51.3	147.7
Elk	9.2	18.2	14.1	12.6	20.6	74.7
Forest	4.1	5.6	5.8	4.7	6.8	27.0
Jefferson	9.2	21.9	17.1	21.7	49.3	119.1
Lycoming	50.0	89.7	65.4	56.8	120.6	382.5
McKean	19.5	36.0	26.7	28.4	64.2	174.7
Potter	5.7	8.1	6.7	6.9	11.4	38.8
Tioga	23.8	43.0	34.0	34.2	60.2	195.2
Warren	8.9	35.6	30.2	29.3	74.7	178.6
Region Total	\$188.0	\$378.1	\$297.3	\$287.3	\$585.1	\$1,735.7

Pennsylvania Wilds – Tourism Satellite Account, 2016

PENNSYLVANIA WILDS TOURISM SATELLITE ACCOUNT CATEGORIES, 2016 (dollar amounts in millions)				
2016	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Cameron	\$10.1	\$0.0	\$0.4	\$10.5
Clarion	118.9	0.3	5.3	124.5
Clearfield	266.2	0.7	11.8	278.7
Clinton	140.6	0.4	6.2	147.2
Elk	78.0	0.2	3.5	81.6
Forest	26.3	0.1	1.2	27.5
Jefferson	116.0	0.2	5.2	121.4
Lycoming	370.6	1.0	16.5	388.1
McKean	171.8	0.4	7.6	179.8
Potter	37.7	0.1	1.7	39.5
Tioga	193.3	0.4	8.6	202.3
Warren	182.3	0.3	8.1	190.6
Region Total	\$1,711.7	\$3.9	\$76.0	\$1,791.6
% Change	-1.4%	1.8%	-16.6%	-2.1%

*Non-Traveler Personal Consumption Expenditures represent travel-related consumer durable purchases, such as an RV, boat, or furniture for a vacation home.

Pennsylvania Wilds – Tourism Satellite Account, 2015

PENNSYLVANIA WILDS TOURISM SATELLITE ACCOUNT CATEGORIES, 2015 (dollar amounts in millions)				
2015	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Cameron	\$9.7	\$0.0	\$0.5	\$10.3
Clarion	117.7	0.3	6.2	124.1
Clearfield	270.0	0.7	14.2	284.9
Clinton	147.7	0.3	7.8	155.7
Elk	74.7	0.2	3.9	78.7
Forest	27.0	0.1	1.4	28.5
Jefferson	119.1	0.2	6.3	125.6
Lycoming	382.5	1.0	20.1	403.5
McKean	174.7	0.3	9.2	184.2
Potter	38.8	0.1	2.0	40.9
Tioga	195.2	0.5	10.3	205.9
Warren	178.6	0.2	9.4	188.2
Region Total	\$1,735.7	\$3.8	\$91.1	\$1,830.7

*Non-Traveler Personal Consumption Expenditures represent travel-related consumer durable purchases, such as an RV, boat, or furniture for a vacation home.

Pennsylvania Wilds –Travel Industry Impacts, 2016

PENNSYLVANIA WILDS TRAVEL INDUSTRY IMPACTS, 2016 (dollar amounts in millions)

2016	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Cameron	\$10.1	77	\$1.5	\$0.5	\$0.4
Clarion	118.9	1,110	25.6	6.4	5.9
Clearfield	266.2	1,812	50.1	13.7	12.2
Clinton	140.6	1,069	28.4	7.4	6.7
Elk	78.0	591	12.6	3.8	3.3
Forest	26.3	139	3.8	1.2	1.0
Jefferson	116.0	816	24.1	6.1	5.6
Lycoming	370.6	2,930	78.0	19.9	18.1
McKean	171.8	1,172	31.4	8.7	7.7
Potter	37.7	245	5.8	1.8	1.5
Tioga	193.3	1,623	41.4	10.4	9.5
Warren	182.3	1,167	27.8	8.6	7.4
Region Total	\$1,711.7	12,751	\$330.3	\$88.6	\$79.3
% Change	-1.4%	0.9%	0.4%	-1.4%	0.8%

Pennsylvania Wilds –Travel Industry Impacts, 2015

PENNSYLVANIA WILDS TRAVEL INDUSTRY IMPACTS, 2015 (dollar amounts in millions)

2015	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Cameron	\$9.7	76	\$1.5	\$0.5	\$0.4
Clarion	117.7	1,071	24.6	6.3	5.6
Clearfield	270.0	1,799	49.5	13.9	12.0
Clinton	147.7	1,064	28.8	7.7	6.8
Elk	74.7	573	12.2	3.7	3.1
Forest	27.0	138	3.7	1.3	1.0
Jefferson	119.1	821	23.9	6.2	5.6
Lycoming	382.5	2,952	79.6	20.6	18.3
McKean	174.7	1,164	31.5	8.9	7.7
Potter	38.8	246	5.9	1.9	1.6
Tioga	195.2	1,573	40.4	10.5	9.3
Warren	178.6	1,156	27.5	8.5	7.2
Region Total	\$1,735.7	12,632	\$329.1	\$89.9	\$78.7

Pennsylvania Wilds –Travel Economy Impacts, 2016

PENNSYLVANIA WILDS TRAVEL ECONOMY IMPACTS, 2016 (dollar amounts in millions)

2016	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Cameron	\$10.5	133	\$2.9	\$0.8	\$0.8
Clarion	124.5	1,747	50.5	11.3	11.8
Clearfield	278.7	2,950	97.7	24.0	24.5
Clinton	147.2	1,688	55.7	13.0	13.5
Elk	81.6	968	24.6	6.7	6.6
Forest	27.5	236	7.3	2.2	2.1
Jefferson	121.4	1,393	47.0	10.8	11.3
Lycoming	388.1	4,608	151.5	34.9	36.4
McKean	179.8	1,826	61.2	15.3	15.5
Potter	39.5	420	11.4	3.2	3.1
Tioga	202.3	2,416	79.9	18.3	19.2
Warren	190.6	1,851	54.5	15.1	15.0
Region Total	\$1,791.6	20,237	\$644.2	\$155.3	\$159.7
% Change	-2.1%	1.0%	0.3%	-1.6%	0.8%

Pennsylvania Wilds –Travel Economy Impacts, 2015

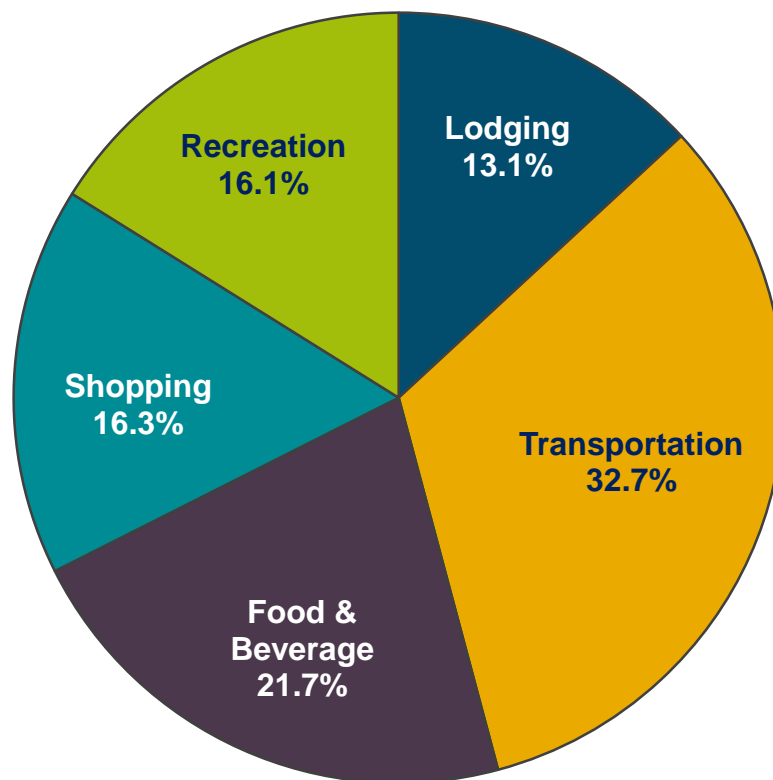
PENNSYLVANIA WILDS TRAVEL ECONOMY IMPACTS, 2015 (dollar amounts in millions)

2015	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Cameron	\$10.3	131	\$2.9	\$0.8	\$0.8
Clarion	124.1	1,686	48.0	11.1	11.4
Clearfield	284.9	2,923	96.7	24.4	24.2
Clinton	155.7	1,678	56.2	13.6	13.7
Elk	78.7	944	23.8	6.5	6.3
Forest	28.5	234	7.3	2.3	2.1
Jefferson	125.6	1,394	46.6	11.0	11.2
Lycoming	403.5	4,630	155.4	36.1	36.9
McKean	184.2	1,812	61.5	15.6	15.5
Potter	40.9	419	11.5	3.3	3.1
Tioga	205.9	2,343	78.8	18.4	18.8
Warren	188.2	1,836	53.7	15.0	14.5
Region Total	\$1,830.7	20,030	\$642.4	\$157.9	\$158.4

The Alleghenies

- The Alleghenies is comprised of the following counties: Bedford, Blair, Cambria, Centre, Fulton, Huntingdon, Juniata, and Mifflin.
- Travelers spent nearly \$2.0 billion in The Alleghenies region in 2016 – a 1.6% increase from 2015.
- As in prior years, visitors to the region continued to spend a relatively high percentage of their trip dollars on transportation – ranking third among the state’s tourism regions in the share of dollars spent on this category, and far less on retail and recreation purchases with rankings of 8th and 10th, respectively.

The Alleghenies Region 2016 Spending by Category

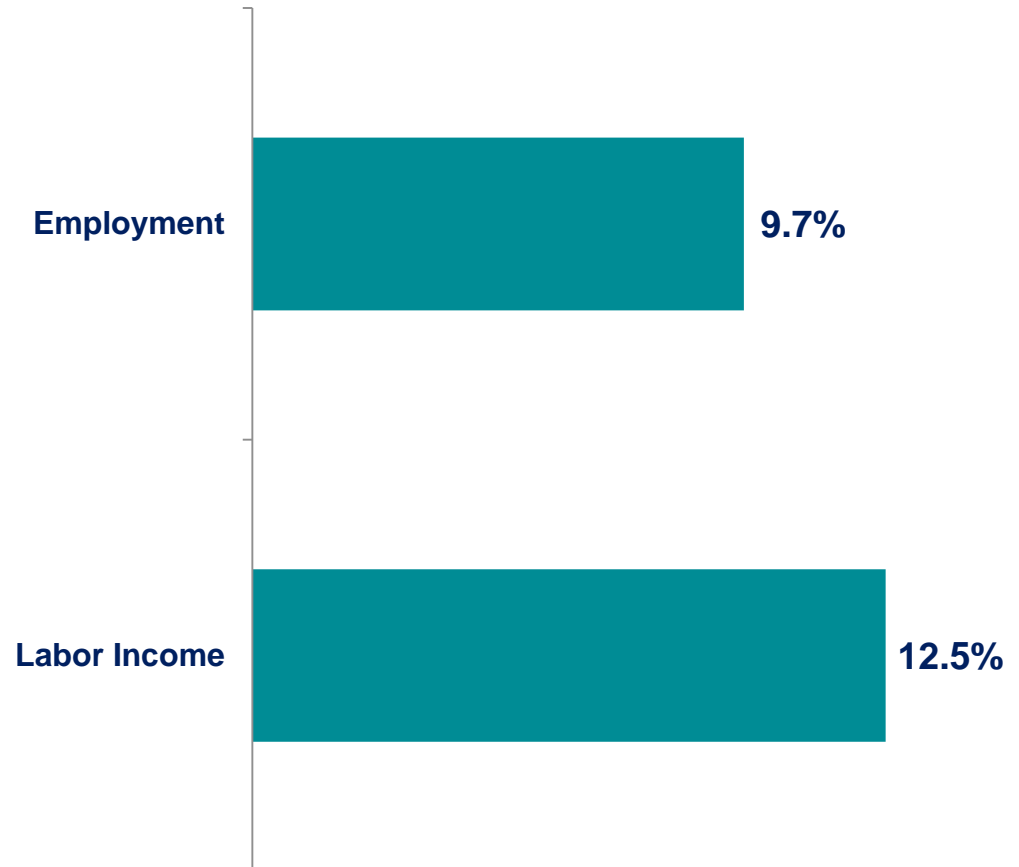


Source: Tourism Economics

The Alleghenies

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- The region rank 5th among the state's tourism regions in the share of travel-supported jobs relative to the region's total employment number.
- The travel industry was responsible for 12.5% of the labor income earned in The Alleghenies region in 2016 – the second highest share of the state's tourism regions and well above the region's travel industry employment share of 9.7%, which was up 0.2 of a percentage point from 2015.

Travel Industry Share of Regional Economy



The Alleghenies – Traveler Spending & Employment Timelines

THE ALLEGHENIES TRAVELER SPENDING, 2006 – 2016

County	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Bedford	\$243.5	\$259.6	\$286.0	\$239.0	\$263.0	\$274.7	\$280.2	\$282.9	\$283.9	\$284.9	\$287.3
Blair	260.4	278.1	296.8	249.3	271.2	295.3	307.4	309.6	312.9	324.9	335.2
Cambria	232.3	244.3	280.9	238.5	257.6	290.5	303.4	301.0	302.9	308.1	310.9
Centre	511.2	531.4	616.4	545.6	588.7	649.3	654.3	694.1	720.2	741.8	748.5
Fulton	19.2	20.4	22.4	17.4	19.3	21.7	23.7	23.5	23.2	23.3	23.5
Huntingdon	125.7	135.3	146.6	129.1	144.1	153.1	162.8	161.7	160.4	163.9	166.5
Juniata	28.6	30.3	33.4	28.5	31.0	34.8	36.3	36.8	36.5	37.2	36.7
Mifflin	58.4	60.8	67.0	54.4	58.9	62.8	63.5	64.9	65.2	65.2	72.0
Region Total	\$1,479.2	\$1,560.1	\$1,749.6	\$1,501.9	\$1,633.9	\$1,782.3	\$1,831.6	\$1,874.4	\$1,905.2	\$1,949.2	\$1,980.7
% Change	0.6%	5.5%	12.1%	-14.2%	8.8%	9.1%	2.8%	2.3%	1.6%	2.3%	1.6%

THE ALLEGHENIES TRAVEL INDUSTRY EMPLOYMENT, 2006 – 2016

County	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Bedford	2,044	2,113	2,151	1,977	2,026	2,015	1,967	1,978	2,004	2,042	2,054
Blair	2,449	2,512	2,582	2,446	2,499	2,544	2,554	2,609	2,588	2,665	2,758
Cambria	2,173	2,155	2,109	2,021	2,005	2,021	2,064	2,053	2,042	2,025	2,061
Centre	4,635	4,657	4,782	4,641	4,705	4,765	4,835	4,923	4,875	4,935	5,004
Fulton	148	152	154	143	152	152	154	155	156	158	161
Huntingdon	1,209	1,224	1,244	1,221	1,273	1,308	1,292	1,329	1,335	1,356	1,394
Juniata	240	247	251	239	218	219	222	223	224	226	231
Mifflin	588	599	610	567	583	589	598	605	608	618	641
Region Total	13,486	13,658	13,883	13,254	13,460	13,614	13,687	13,876	13,833	14,024	14,306
% Change	0.6%	1.3%	1.6%	-4.5%	1.6%	1.1%	0.5%	1.4%	-0.3%	1.4%	2.0%

The Alleghenies – Traveler Spending by Category

THE ALLEGHENIES TRAVELER SPENDING BY CATEGORY, 2015 and 2016 (dollar amounts in millions)

2016	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Bedford	\$43.7	\$57.7	\$44.2	\$46.6	\$95.2	\$287.3
Blair	32.8	70.6	54.6	54.0	123.2	335.2
Cambria	26.4	61.9	48.6	50.3	123.7	310.9
Centre	130.7	170.6	125.3	112.9	208.9	748.5
Fulton	2.2	5.0	4.1	4.5	7.7	23.5
Huntingdon	14.7	37.5	27.5	32.0	54.7	166.5
Juniata	1.7	8.4	6.3	7.8	12.6	36.7
Mifflin	7.4	18.8	12.9	10.3	22.6	72.0
Region Total	\$259.5	\$430.6	\$323.5	\$318.6	\$648.6	\$1,980.7
% Change	3.0%	2.1%	0.8%	3.7%	0.1%	1.6%

2015	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Bedford	\$43.1	\$57.1	\$43.6	\$44.7	\$96.4	\$284.9
Blair	31.7	68.5	54.0	51.8	119.0	324.9
Cambria	24.2	61.4	49.1	49.5	123.9	308.1
Centre	128.8	167.5	124.7	109.5	211.3	741.8
Fulton	2.1	4.9	4.1	4.4	7.9	23.3
Huntingdon	14.3	36.6	27.2	30.7	55.2	163.9
Juniata	1.8	8.4	6.3	7.8	12.9	37.2
Mifflin	5.9	17.3	12.0	8.9	21.1	65.2
Region Total	\$251.8	\$421.7	\$320.9	\$307.2	\$647.6	\$1,949.2

The Alleghenies – Tourism Satellite Account

THE ALLEGHENIES TOURISM SATELLITE ACCOUNT CATEGORIES, 2015 and 2016 (dollar amounts in millions)				
	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
2016				
Bedford	\$287.3	\$0.6	\$12.8	\$300.7
Blair	335.2	0.8	14.9	350.9
Cambria	310.9	0.8	13.8	325.5
Centre	748.5	2.4	33.2	784.1
Fulton	23.5	0.0	1.0	24.6
Huntingdon	166.5	0.3	7.4	174.2
Juniata	36.7	0.0	1.6	38.4
Mifflin	72.0	0.2	3.2	75.4
Region Total	\$1,980.7	\$5.1	\$87.9	\$2,073.8
% Change	1.6%	13.1%	-14.1%	0.9%
2015				
Bedford	\$284.9	\$0.6	\$15.0	\$300.4
Blair	324.9	0.7	17.1	342.7
Cambria	308.1	0.6	16.2	324.8
Centre	741.8	2.2	38.9	783.0
Fulton	23.3	0.0	1.2	24.6
Huntingdon	163.9	0.3	8.6	172.8
Juniata	37.2	0.0	2.0	39.2
Mifflin	65.2	0.1	3.4	68.7
Region Total	\$1,949.2	\$4.5	\$102.3	\$2,056.1

*Non-Traveler Personal Consumption Expenditures represent travel-related consumer durable purchases, such as an RV, boat, or furniture for a vacation home.

The Alleghenies –Travel Industry Impacts, 2015 & 2016

THE ALLEGHENIES TRAVEL INDUSTRY IMPACTS, 2015 and 2016 (dollar amounts in millions)

2016	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Bedford	\$287.3	2,054	\$56.9	\$15.0	\$13.5
Blair	335.2	2,758	77.9	18.7	17.3
Cambria	310.9	2,061	68.4	16.9	15.6
Centre	748.5	5,004	149.7	39.9	35.4
Fulton	23.5	161	3.7	1.1	1.0
Huntingdon	166.5	1,394	35.4	8.9	8.2
Juniata	36.7	231	5.1	1.7	1.4
Mifflin	72.0	641	14.6	3.8	3.4
Region Total	\$1,980.7	14,306	\$411.7	\$106.0	\$95.8
% Change	1.6%	2.0%	1.1%	1.2%	2.5%

2015	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Bedford	\$284.9	2,042	\$56.6	\$15.0	\$13.3
Blair	324.9	2,665	76.3	18.2	16.7
Cambria	308.1	2,025	68.1	16.7	15.3
Centre	741.8	4,935	148.0	39.7	34.6
Fulton	23.3	158	3.7	1.1	1.0
Huntingdon	163.9	1,356	34.8	8.8	7.9
Juniata	37.2	226	5.0	1.7	1.4
Mifflin	65.2	618	14.4	3.5	3.2
Region Total	\$1,949.2	14,024	\$407.0	\$104.7	\$93.5

The Alleghenies –Travel Economy Impacts, 2015 & 2016

THE ALLEGHENIES TRAVEL ECONOMY IMPACTS, 2015 and 2016 (dollar amounts in millions)

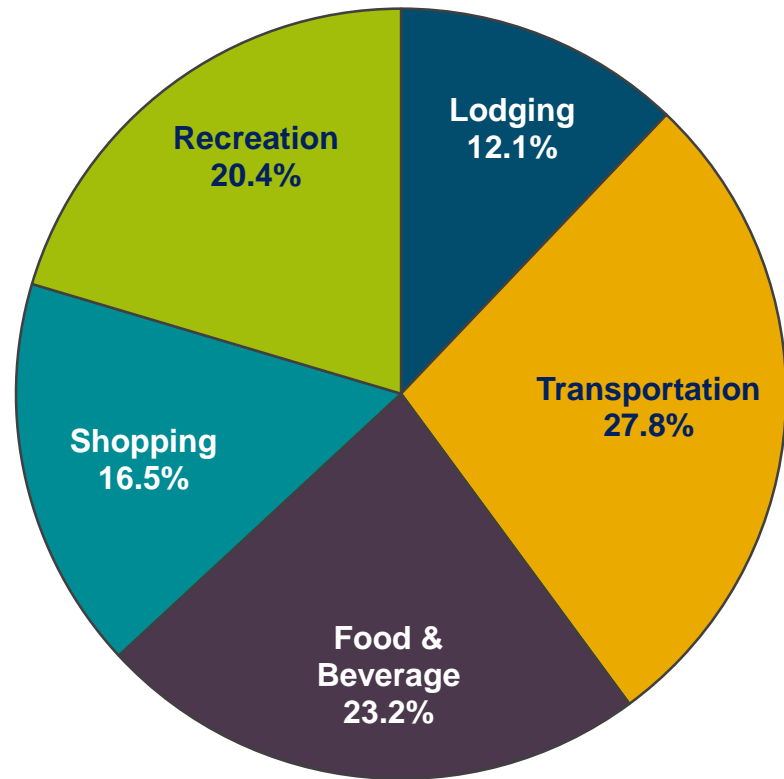
2016	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Bedford	\$300.7	3,057	\$110.4	\$26.3	\$27.2
Blair	350.9	4,375	151.6	32.7	34.9
Cambria	325.5	3,575	132.8	29.7	31.3
Centre	784.1	7,648	293.7	69.5	71.3
Fulton	24.6	296	7.3	2.0	2.0
Huntingdon	174.2	2,149	69.4	15.6	16.4
Juniata	38.4	475	9.9	3.0	2.9
Mifflin	75.4	1,121	28.7	6.7	6.9
Region Total	\$2,073.8	22,696	\$803.9	\$185.4	\$192.9
% Change	0.9%	1.9%	1.2%	0.8%	2.4%

2015	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Bedford	\$300.4	3,034	\$110.4	\$26.3	\$26.7
Blair	342.7	4,246	149.0	32.1	33.8
Cambria	324.8	3,540	133.0	29.6	30.8
Centre	783.0	7,520	289.0	69.3	69.8
Fulton	24.6	292	7.3	2.0	1.9
Huntingdon	172.8	2,090	68.0	15.5	16.0
Juniata	39.2	463	9.9	3.0	2.8
Mifflin	68.7	1,087	28.1	6.3	6.5
Region Total	\$2,056.1	22,272	\$794.6	\$184.0	\$188.3

Valleys of the Susquehanna

- The Valleys of the Susquehanna region is comprised of the following counties: Columbia, Montour, Northumberland, Snyder, and Union.
- Travelers spent \$627 million in the region in 2016 – a 1.2% increase from 2015.
- As in prior years, the Valleys of the Susquehanna region continued to have the highest proportion of traveler dollars spent on food & beverages among the state's 11 tourism regions and the second highest share spent on recreation – with both categories posting relatively strong increases from 2015.

**Valleys of the Susquehanna Region
2016 Spending by Category**

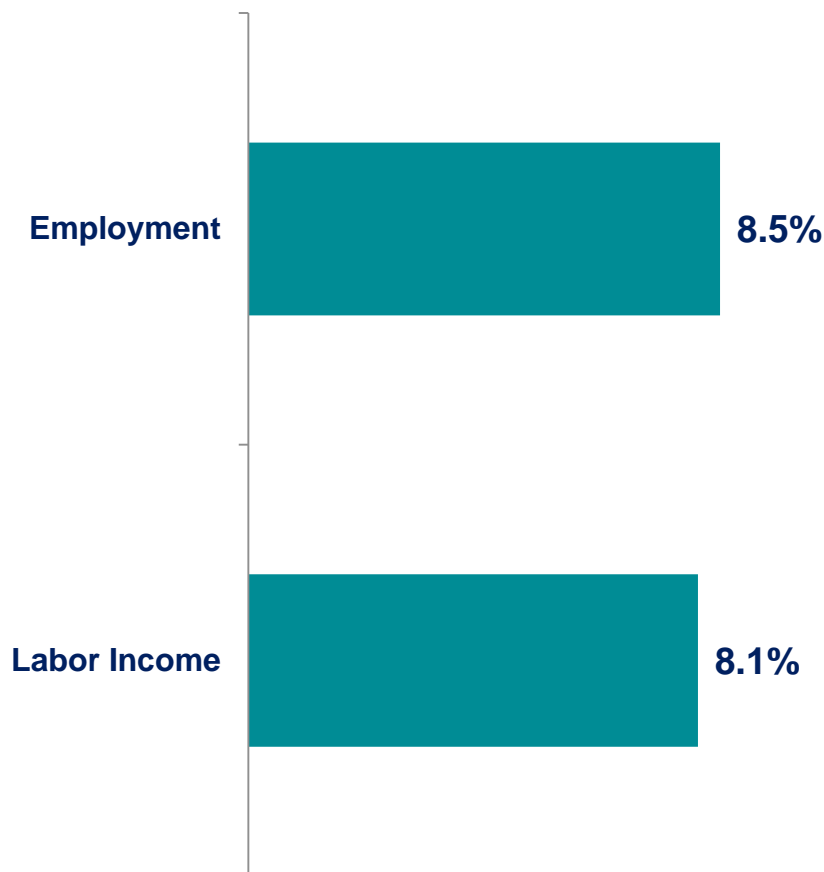


Source: Tourism Economics

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 region continued to have the smallest number of travel-supported jobs among the state's 11 tourism, with the travel industry's employment share continuing to rank 8th among the regions and its travel-supported labor income share dropping to 10th in 2016.
- The travel industry was responsible for 8.5% of the region's labor income and 8.1% of the region's employment in 2016.

Travel Industry Share of Regional Economy



Valleys of the Susquehanna – Traveler Spending & Employment Timelines

VALLEYS OF THE SUSQUEHANNA TRAVELER SPENDING, 2006 – 2016 (dollar amounts in millions)

County	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Columbia	\$117.8	\$125.5	\$140.3	\$114.5	\$127.6	\$150.5	\$150.6	\$153.7	\$153.8	\$151.9	\$154.2
Montour	84.5	84.9	93.5	79.2	88.0	97.3	105.3	102.3	97.2	96.1	94.4
Northumberland	99.5	102.9	114.4	99.1	113.3	118.3	118.3	124.3	125.0	129.8	133.1
Snyder	81.0	84.3	90.3	74.9	83.5	90.6	90.2	95.3	98.8	99.3	103.5
Union	113.4	118.0	136.7	115.7	124.3	147.8	157.5	149.2	142.7	142.6	142.0
Region Total	\$496.1	\$515.6	\$575.2	\$483.3	\$536.6	\$604.6	\$622.0	\$624.7	\$617.5	\$619.8	\$627.2
% Change	2.1%	3.9%	11.6%	-16.0%	11.0%	12.7%	2.9%	0.4%	-1.2%	0.4%	1.2%

VALLEYS OF THE SUSQUEHANNA TRAVEL INDUSTRY EMPLOYMENT, 2006 – 2016

County	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Columbia	1,111	1,147	1,163	1,141	1,171	1,217	1,258	1,291	1,290	1,292	1,302
Montour	865	863	850	800	823	839	863	884	889	902	926
Northumberland	984	980	997	943	988	1,013	1,050	1,066	1,078	1,101	1,107
Snyder	687	690	702	665	691	702	722	740	744	764	776
Union	1,063	1,098	1,116	1,098	1,126	1,152	1,188	1,224	1,229	1,216	1,243
Region Total	4,710	4,777	4,828	4,647	4,799	4,924	5,081	5,205	5,229	5,275	5,353
% Change	2.3%	1.4%	1.1%	-3.7%	3.3%	2.6%	3.2%	2.4%	0.5%	0.9%	1.5%

Valleys of the Susquehanna – Traveler Spending by Category

VALLEYS OF THE SUSQUEHANNA TRAVELER SPENDING BY CATEGORY, 2015 and 2016 (dollar amounts in millions)

2016	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Columbia	\$20.7	\$38.6	\$24.9	\$26.6	\$43.5	\$154.2
Montour	14.6	20.5	14.9	18.6	25.9	94.4
Northumberland	4.3	24.0	16.7	42.3	45.7	133.1
Snyder	13.0	25.1	20.4	21.0	24.0	103.5
Union	23.2	37.4	26.7	19.5	35.2	142.0
Region Total	\$75.8	\$145.6	\$103.6	\$127.9	\$174.3	\$627.2
% Change	2.5%	2.8%	0.7%	1.4%	-0.5%	1.2%

2015	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Columbia	\$20.3	\$38.0	\$24.8	\$25.8	\$42.9	\$151.9
Montour	14.7	20.4	15.1	18.9	27.0	96.1
Northumberland	4.2	23.2	16.4	41.6	44.4	129.8
Snyder	11.7	23.7	19.8	20.2	23.9	99.3
Union	23.0	36.3	26.7	19.7	36.9	142.6
Region Total	\$73.9	\$141.7	\$102.9	\$126.2	\$175.2	\$619.8

Valleys of the Susquehanna – Tourism Satellite Account

VALLEYS OF THE SUSQUEHANNA TOURISM SATELLITE ACCOUNT CATEGORIES, 2015 and 2016 (dollar amounts in millions)				
2016	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Columbia	\$154.2	\$0.4	\$6.8	\$161.5
Montour	94.4	0.3	4.2	98.9
Northumberland	133.1	0.1	5.9	139.1
Snyder	103.5	0.3	4.6	108.4
Union	142.0	0.5	6.3	148.8
Region Total	\$627.2	\$1.6	\$27.8	\$656.6
% Change	1.2%	4.3%	-14.4%	0.4%
2015	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Columbia	\$151.9	\$0.4	\$8.0	\$160.3
Montour	96.1	0.3	5.0	101.5
Northumberland	129.8	0.1	6.8	136.8
Snyder	99.3	0.3	5.2	104.8
Union	142.6	0.5	7.5	150.6
Region Total	\$619.8	\$1.6	\$32.5	\$653.9

*Non-Traveler Personal Consumption Expenditures represent travel-related consumer durable purchases, such as an RV, boat, or furniture for a vacation home.

Valleys of the Susquehanna – Travel Industry Impacts, 2015 & 2016

VALLEYS OF THE SUSQUEHANNA TRAVEL INDUSTRY IMPACTS, 2015 and 2016 (dollar amounts in millions)

2016	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Columbia	\$154.2	1,302	\$31.3	\$8.2	\$7.4
Montour	94.4	926	22.8	5.4	5.0
Northumberland	133.1	1,107	31.3	7.2	6.9
Snyder	103.5	776	16.8	5.1	4.4
Union	142.0	1,243	31.3	7.9	7.1
Region Total	\$627.2	5,353	\$133.6	\$33.9	\$30.8
% Change	1.2%	1.5%	1.6%	0.7%	2.6%

2015	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Columbia	\$151.9	1,292	\$30.3	\$8.1	\$7.1
Montour	96.1	902	22.3	5.5	4.9
Northumberland	129.8	1,101	31.7	7.2	6.9
Snyder	99.3	764	16.7	5.0	4.2
Union	142.6	1,216	30.5	7.9	6.9
Region Total	\$619.8	5,275	\$131.5	\$33.6	\$30.0

Valleys of the Susquehanna – Travel Economy Impacts, 2015 & 2016

VALLEYS OF THE SUSQUEHANNA TRAVEL ECONOMY IMPACTS, 2015 and 2016 (dollar amounts in millions)

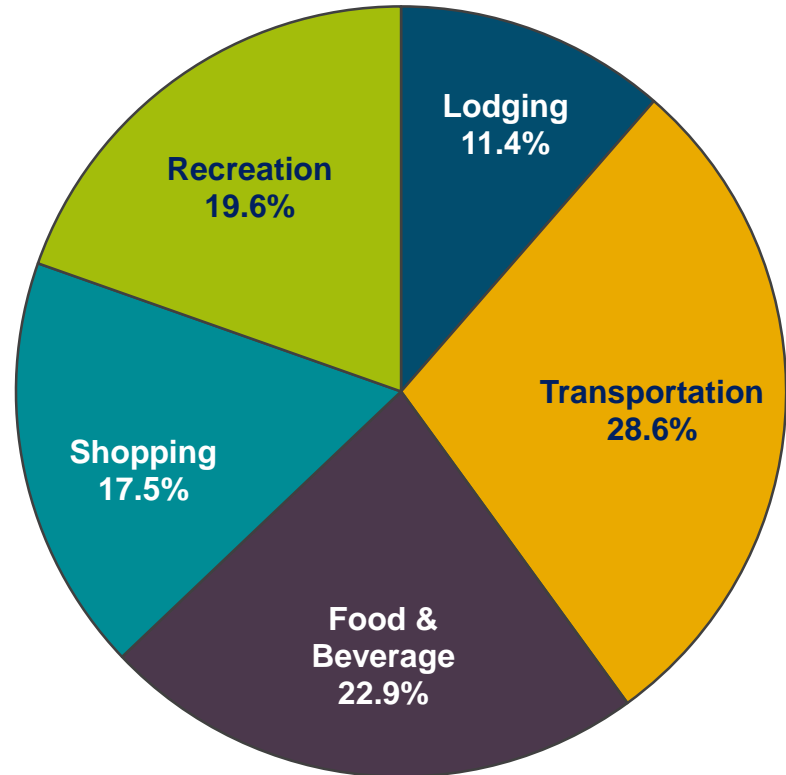
2016	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Columbia	\$161.5	2,115	\$60.7	\$14.3	\$14.8
Montour	98.9	1,351	44.6	9.4	10.1
Northumberland	139.1	1,984	61.0	12.9	14.0
Snyder	108.4	1,275	33.5	8.9	8.8
Union	148.8	1,935	61.5	13.7	14.3
Region Total	\$656.6	8,660	\$261.3	\$59.3	\$62.0
% Change	0.4%	1.7%	1.8%	0.5%	2.5%

2015	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Columbia	\$160.3	2,097	\$59.1	\$14.2	\$14.3
Montour	101.5	1,315	43.6	9.6	9.9
Northumberland	136.8	1,970	61.9	12.8	13.8
Snyder	104.8	1,249	32.6	8.7	8.5
Union	150.6	1,887	59.5	13.7	14.0
Region Total	\$653.9	8,518	\$256.6	\$59.0	\$60.5

Upstate PA

- The Upstate PA region is comprised of the following counties: Bradford, Lackawanna, Luzerne, Schuylkill, Sullivan, Susquehanna, and Wyoming.
- Travelers spent well over \$2.1 billion in the Upstate PA region in 2016 – a 0.8% decrease and the same percentage decline as in 2015.
- As in prior years, the Upstate PA region continued to have the second highest share of spending by travelers on food & beverage purchases among the state's 11 tourism regions in 2015, but ranked 9th in the share of travel dollars spent on lodging.

Upstate PA Region 2016 Spending by Category

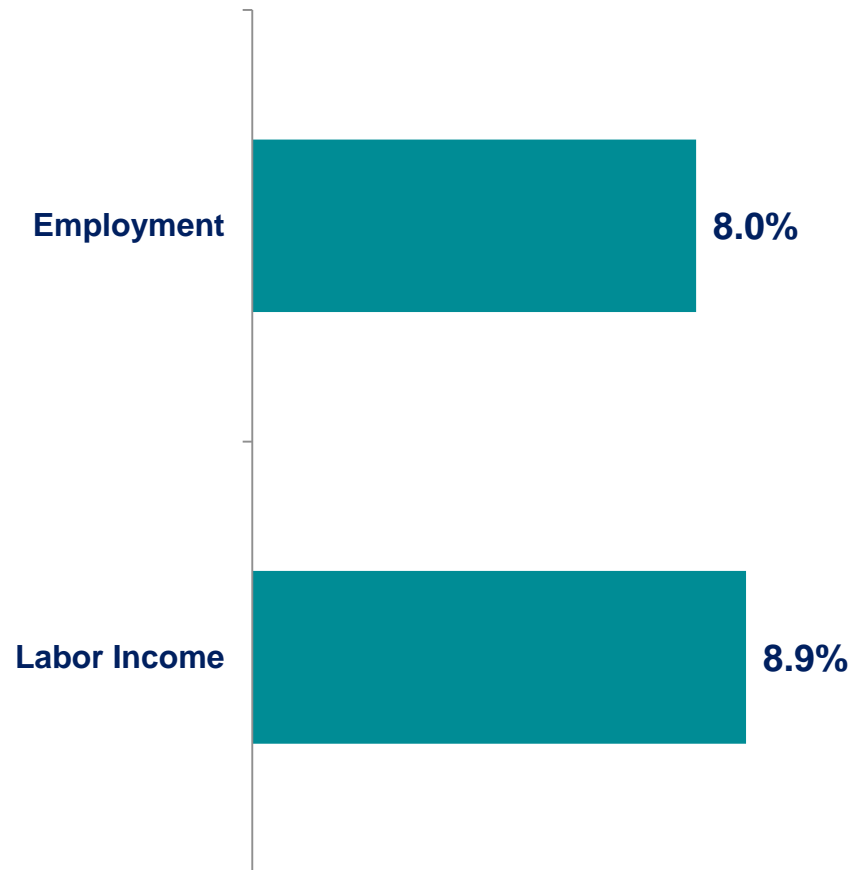


Source: Tourism Economics

Upstate PA

- The chart shows the travel economy's share (including indirect and induced impacts) of the regional total for both labor income and employment.
- As in the previous three years, the travel industry's share of the region's employment was the second lowest of the state's 11 tourism regions, despite ranking 5th in the actual number of jobs supported by travel and tourism.
- The travel-related labor income share for the Upstate PA region was 8.9% in 2016 ranking 8th among the state's tourism regions and, as in 2015, was well above the region's 8.0% employment share.

Travel Industry Share of Regional Economy



Upstate PA – Traveler Spending & Employment Timelines

UPSTATE PA TRAVELER SPENDING, 2006 – 2016 (dollar amounts in millions)

County	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Bradford	\$126.4	\$134.7	\$148.3	\$136.3	\$170.0	\$200.5	\$225.3	\$223.1	\$227.6	\$211.8	\$196.0
Lackawanna	482.8	514.4	566.5	483.1	536.5	615.5	632.1	648.4	633.3	618.4	605.8
Luzerne	702.6	752.5	818.6	708.3	795.5	870.3	870.2	859.9	875.1	889.7	914.2
Schuylkill	168.8	177.5	195.2	158.5	159.2	176.8	195.7	196.3	198.9	206.2	206.2
Sullivan	12.3	12.9	14.4	13.1	16.0	18.7	19.7	19.1	18.6	17.6	17.7
Susquehanna	112.6	121.5	140.4	122.7	141.6	151.8	164.3	163.1	161.7	157.1	153.4
Wyoming	35.3	37.0	40.3	36.8	41.3	53.1	61.2	64.1	63.5	61.2	51.6
Region Total	\$1,640.7	\$1,750.4	\$1,923.7	\$1,658.6	\$1,860.2	\$2,086.6	\$2,168.5	\$2,174.1	\$2,178.6	\$2,161.8	\$2,144.9
% Change	2.8%	6.7%	9.9%	-13.8%	12.2%	12.2%	3.9%	0.3%	0.2%	-0.8%	-0.8%

UPSTATE PA TRAVEL INDUSTRY EMPLOYMENT, 2006 – 2016

County	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Bradford	1,014	1,011	1,031	1,037	1,252	1,326	1,333	1,402	1,410	1,408	1,378
Lackawanna	4,626	4,769	4,855	4,563	4,752	4,882	5,006	5,131	5,183	5,117	5,055
Luzerne	6,028	6,142	6,253	5,978	6,275	6,534	6,619	6,754	7,056	7,068	7,151
Schuylkill	1,215	1,254	1,287	1,187	1,165	1,177	1,203	1,219	1,225	1,221	1,253
Sullivan	111	116	118	117	138	148	160	173	174	167	172
Susquehanna	1,053	1,059	1,044	1,002	1,024	1,061	1,060	1,105	1,110	1,096	1,116
Wyoming	351	359	364	365	362	379	400	421	423	417	404
Region Total	14,399	14,709	14,952	14,250	14,967	15,507	15,781	16,205	16,580	16,494	16,528
% Change	2.6%	2.2%	1.7%	-4.7%	5.0%	3.6%	1.8%	2.7%	2.3%	-0.5%	0.2%

Upstate PA – Traveler Spending by Category, 2015 & 2016

UPSTATE PA TRAVELER SPENDING BY CATEGORY, 2015 and 2016 (dollar amounts in millions)

2016	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Bradford	\$19.4	\$43.4	\$31.5	\$33.2	\$68.5	\$196.0
Lackawanna	75.3	145.6	122.5	110.9	151.5	605.8
Luzerne	112.1	202.7	150.5	200.7	248.2	914.2
Schuylkill	17.9	50.5	35.4	33.2	69.2	206.2
Sullivan	1.9	3.0	2.3	5.5	5.0	17.7
Susquehanna	11.2	33.7	22.9	28.8	56.8	153.4
Wyoming	6.1	11.7	9.9	8.7	15.2	51.6
Region Total	\$243.9	\$490.6	\$375.0	\$421.0	\$614.5	\$2,144.9
% Change	-3.0%	-0.3%	-1.4%	1.6%	-1.4%	-0.8%

2015	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Bradford	\$22.5	\$46.5	\$33.1	\$35.1	\$74.6	\$211.8
Lackawanna	77.9	146.0	124.5	109.9	160.1	618.4
Luzerne	110.5	199.8	149.5	193.0	236.9	889.7
Schuylkill	18.4	50.1	35.2	32.7	69.8	206.2
Sullivan	1.8	2.9	2.3	5.5	5.0	17.6
Susquehanna	11.7	33.5	24.3	28.3	59.3	157.1
Wyoming	8.6	13.5	11.4	10.0	17.6	61.2
Region Total	\$251.5	\$492.2	\$380.3	\$414.5	\$623.4	\$2,161.8

Upstate PA – Tourism Satellite Account

UPSTATE PA TOURISM SATELLITE ACCOUNT CATEGORIES, 2015 and 2016 (dollar amounts in millions)				
2016	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Bradford	\$196.0	\$0.4	\$8.7	\$205.1
Lackawanna	605.8	3.2	26.9	635.8
Luzerne	914.2	3.3	40.6	958.1
Schuylkill	206.2	0.4	9.2	215.8
Sullivan	17.7	0.0	0.8	18.5
Susquehanna	153.4	0.2	6.8	160.5
Wyoming	51.6	0.2	2.3	54.1
Region Total	\$2,144.9	\$7.8	\$95.2	\$2,248.0
% Change	-0.8%	1.3%	-16.1%	-1.5%

2015	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Bradford	\$211.8	\$0.4	\$11.1	\$223.3
Lackawanna	618.4	3.2	32.5	654.1
Luzerne	889.7	3.2	46.7	939.5
Schuylkill	206.2	0.4	10.8	217.4
Sullivan	17.6	0.0	0.9	18.5
Susquehanna	157.1	0.2	8.2	165.6
Wyoming	61.2	0.2	3.2	64.6
Region Total	\$2,161.8	\$7.7	\$113.5	\$2,283.0

*Non-Traveler Personal Consumption Expenditures represent travel-related consumer durable purchases, such as an RV, boat, or furniture for a vacation home.

Upstate PA –Travel Industry Impacts, 2015 & 2016

UPSTATE PA TRAVEL INDUSTRY IMPACTS, 2015 and 2016 (dollar amounts in millions)

2016	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Bradford	\$196.0	1,378	\$35.1	\$9.8	\$8.7
Lackawanna	605.8	5,055	128.0	34.2	29.6
Luzerne	914.2	7,151	236.4	54.3	50.6
Schuylkill	206.2	1,253	42.9	10.9	10.0
Sullivan	17.7	172	3.6	0.9	0.8
Susquehanna	153.4	1,116	24.9	7.4	6.5
Wyoming	51.6	404	10.5	2.8	2.5
Region Total	\$2,144.9	16,528	\$481.4	\$120.3	\$108.6
% Change	-0.8%	0.2%	0.3%	-1.0%	1.0%

2015	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Bradford	\$211.8	1,408	\$35.8	\$10.5	\$9.0
Lackawanna	618.4	5,117	126.6	34.8	29.3
Luzerne	889.7	7,068	236.2	53.6	49.6
Schuylkill	206.2	1,221	42.4	10.9	9.8
Sullivan	17.6	167	3.5	0.9	0.8
Susquehanna	157.1	1,096	24.6	7.5	6.4
Wyoming	61.2	417	10.8	3.2	2.7
Region Total	\$2,161.8	16,494	\$479.8	\$121.5	\$107.6

Upstate PA –Travel Economy Impacts, 2015 & 2016

UPSTATE PA TRAVEL ECONOMY IMPACTS, 2015 and 2016 (dollar amounts in millions)

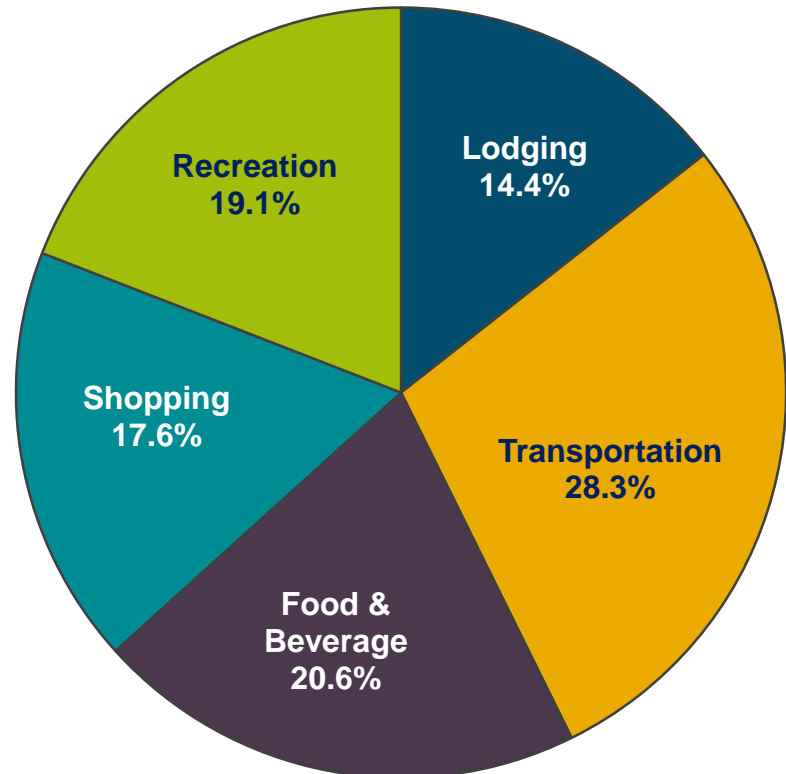
2016	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Bradford	\$205.1	2,197	\$67.9	\$17.3	\$17.5
Lackawanna	635.8	8,019	250.1	58.7	59.6
Luzerne	958.1	11,463	463.5	94.5	102.0
Schuylkill	215.8	2,498	83.8	19.2	20.1
Sullivan	18.5	258	6.8	1.6	1.7
Susquehanna	160.5	1,767	47.9	13.0	13.0
Wyoming	54.1	685	20.5	4.9	5.0
Region Total	\$2,248.0	26,888	\$940.5	\$209.1	\$218.9
% Change	-1.5%	0.5%	0.4%	-1.2%	0.9%

2015	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Bradford	\$223.3	2,245	\$69.9	\$18.5	\$18.1
Lackawanna	654.1	8,065	247.1	59.7	59.0
Luzerne	939.5	11,300	461.1	93.7	100.0
Schuylkill	217.4	2,446	82.8	19.3	19.7
Sullivan	18.5	253	6.8	1.6	1.6
Susquehanna	165.6	1,739	48.1	13.3	12.9
Wyoming	64.6	705	21.0	5.5	5.4
Region Total	\$2,283.0	26,752	\$936.7	\$211.6	\$216.8

Pocono Mountains

- The Pocono Mountains region is comprised of the following counties: Carbon, Monroe, Pike, and Wayne.
- Travelers spent well over \$3.5 billion in the Pocono Mountains region in 2016. The region's 9.7% growth rate from 2015 was the strongest rate of increase among the state's tourism regions, with the region also having the strongest dollar increase in 2016.
- The Pocono Mountains region had the second highest proportion of traveler dollars spent on shopping and on lodging among the state's 11 tourism regions in 2016.

Pocono Mountains Region 2016 Spending by Category

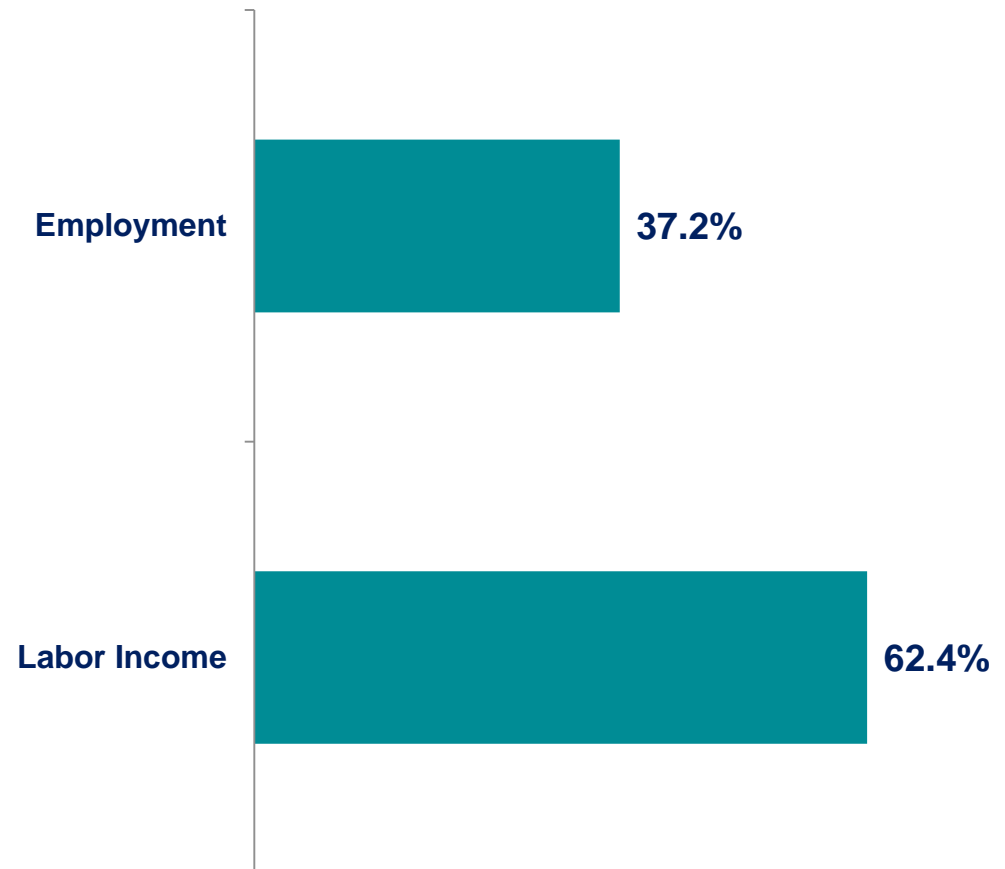


Source: Tourism Economics

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.
- As in prior years, the Pocono Mountains region continued to have, by far, the highest proportion of labor income and employment supported by travel of the state's 11 tourism regions in 2016.
- Close to two-thirds of the region's labor income was derived from travel and tourism in 2016, while the employment share grew to 37.2%.

Travel Industry Share of Regional Economy



Pocono Mountains – Traveler Spending & Employment Timelines

POCONO MOUNTAINS TRAVELER SPENDING, 2006 – 2016 (dollar amounts in millions)

County	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Carbon	\$288.8	\$303.3	\$320.2	\$294.5	\$314.7	\$332.4	\$343.7	\$345.4	\$344.8	\$366.3	393.9
Monroe	1370.7	1,472.5	1,665.3	1,372.6	1,502.1	1,552.0	1,607.5	1,596.5	1,606.3	1,788.2	2,034.8
Pike	543.5	559.6	616.5	520.7	538.0	553.5	575.1	606.0	607.0	636.6	663.7
Wayne	382.6	409.3	437.6	400.4	422.4	432.7	429.5	424.2	419.7	433.1	443.8
Region Total	\$2,585.6	\$2,744.7	\$3,039.6	\$2,588.2	\$2,777.2	\$2,870.7	\$2,955.9	\$2,972.1	\$2,977.7	\$3,224.2	3,536.2
% Change	-0.1%	6.2%	10.7%	-14.9%	7.3%	3.4%	3.0%	0.5%	0.2%	8.3%	9.7%

POCONO MOUNTAINS TRAVEL INDUSTRY EMPLOYMENT, 2006 – 2016

County	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Carbon	2,775	2,816	2,792	2,766	2,717	2,733	2,638	2,693	2,722	2,759	2,897
Monroe	13,192	13,719	13,777	12,780	12,937	13,011	12,847	12,912	12,890	13,411	14,050
Pike	5,658	5,758	5,715	5,257	4,856	4,852	4,760	4,853	4,922	5,084	5,229
Wayne	3,170	3,157	3,212	3,151	3,107	3,120	3,143	3,120	3,049	3,103	3,197
Region Total	24,794	25,451	25,496	23,954	23,617	23,717	23,388	23,579	23,582	24,358	25,374
% Change	0.6%	2.6%	0.2%	-6.0%	-1.4%	0.4%	-1.4%	0.8%	0.0%	3.3%	4.2%

Pocono Mountains – Traveler Spending by Category

POCONO MOUNTAINS TRAVELER SPENDING BY CATEGORY, 2015 and 2016 (dollar amounts in millions)

2016	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Carbon	\$48.0	\$79.6	\$56.5	\$81.3	\$128.5	\$393.9
Monroe	329.1	409.1	388.1	401.9	506.6	2,034.8
Pike	85.6	143.0	106.7	111.0	217.4	663.7
Wayne	46.6	96.5	71.5	81.0	148.3	443.8
Region Total	\$509.3	\$728.3	\$622.7	\$675.1	\$1,000.8	\$3,536.2
% Change	20.5%	10.8%	7.6%	10.7%	4.7%	9.7%

2015	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Carbon	\$40.2	\$72.5	\$54.9	\$72.2	\$126.5	\$366.3
Monroe	259.8	355.3	349.6	354.9	468.5	1,788.2
Pike	77.9	136.2	103.3	106.1	213.2	636.6
Wayne	44.7	93.1	70.7	76.7	147.9	433.1
Region Total	\$422.6	\$657.1	\$578.5	\$610.0	\$956.0	\$3,224.2

Pocono Mountains – Tourism Satellite Account

POCONO MOUNTAINS TOURISM SATELLITE ACCOUNT CATEGORIES, 2015 and 2016 (dollar amounts in millions)

2016	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Carbon	\$393.9	\$0.9	\$17.5	\$412.3
Monroe	2,034.8	7.0	90.3	2,132.1
Pike	663.7	1.6	29.5	694.8
Wayne	443.8	0.7	19.7	464.2
Region Total	\$3,536.2	\$10.2	\$157.0	\$3,703.4
% Change	9.7%	32.1%	-7.2%	8.9%

2015	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Carbon	\$366.3	\$0.7	\$19.2	\$386.2
Monroe	1,788.2	5.1	93.9	1,887.1
Pike	636.6	1.3	33.4	671.3
Wayne	433.1	0.6	22.7	456.5
Region Total	\$3,224.2	\$7.7	\$169.3	\$3,401.2

*Non-Traveler Personal Consumption Expenditures represent travel-related consumer durable purchases, such as an RV, boat, or furniture for a vacation home.

Pocono Mountains – Travel Industry Impacts, 2015 & 2016

POCONO MOUNTAINS TRAVEL INDUSTRY IMPACTS, 2015 and 2016 (dollar amounts in millions)

2016	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Carbon	\$393.9	2,897	\$70.2	\$19.8	\$17.5
Monroe	2,034.8	14,050	464.8	114.5	104.2
Pike	663.7	5,229	177.6	39.1	37.5
Wayne	443.8	3,197	100.6	24.1	22.6
Region Total	\$3,536.2	25,374	\$813.2	\$197.6	\$181.8
% Change	9.7%	4.2%	5.2%	8.1%	8.0%

2015	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Carbon	\$366.3	2,759	\$66.6	\$18.6	\$16.2
Monroe	1,788.2	13,411	433.2	102.6	94.0
Pike	636.6	5,084	174.2	37.9	36.2
Wayne	433.1	3,103	98.8	23.7	21.9
Region Total	\$3,224.2	24,358	\$772.8	\$182.8	\$168.3

Pocono Mountains – Travel Economy Impacts, 2015 & 2016

POCONO MOUNTAINS TRAVEL ECONOMY IMPACTS, 2015 and 2016 (dollar amounts in millions)

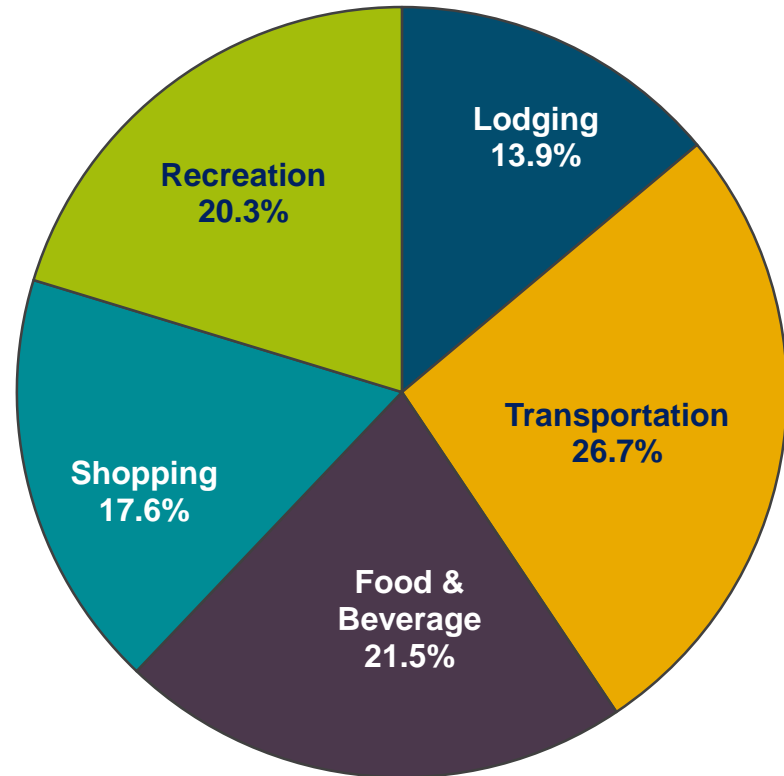
2016	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Carbon	\$412.3	4,299	\$136.0	\$34.7	\$35.1
Monroe	2,132.1	20,169	896.3	199.4	209.9
Pike	694.8	7,422	347.8	68.8	75.7
Wayne	464.2	4,746	196.3	42.5	45.6
Region Total	\$3,703.4	36,636	\$1,576.4	\$345.4	\$366.3
% Change	8.9%	4.3%	4.5%	7.4%	8.0%

2015	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Carbon	\$386.2	4,091	\$129.9	\$32.7	\$32.6
Monroe	1,887.1	19,237	845.7	180.0	189.4
Pike	671.3	7,207	340.1	67.0	73.0
Wayne	456.5	4,605	193.0	41.9	44.2
Region Total	\$3,401.2	35,140	\$1,508.7	\$321.6	\$339.3

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 nearly \$8.4 billion in the Dutch Country Roads region in 2016, a new record high and a 2.4% increase from 2015 – the fourth highest increase of the state’s 11 tourism regions and third highest in dollar terms.
- The region had the third highest proportion of traveler dollars spent on lodging and on shopping of the state’s 11 tourism regions in 2016 and the second lowest share spent on transportation, while ranking fourth in the percentage of traveler budgets allocated to recreation.

Dutch Country Roads Region 2016 Spending by Category

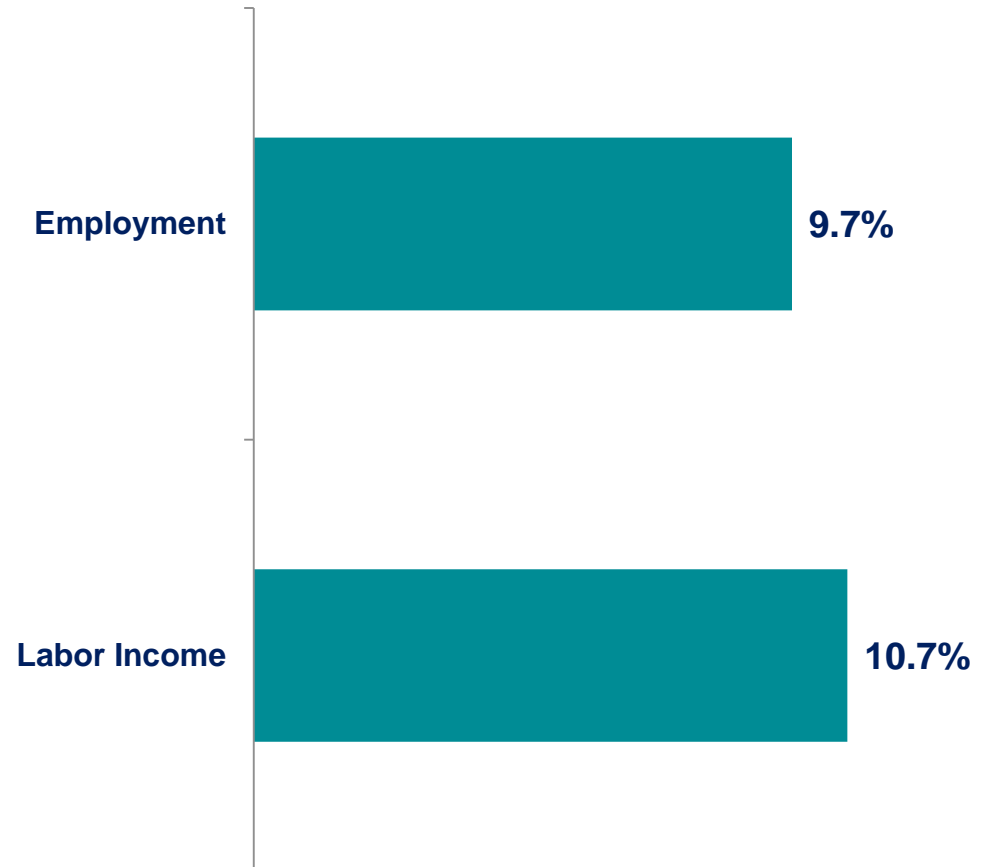


Source: Tourism Economics

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 region continued to have the second highest number of jobs supported by the travel industry among the state's 11 tourism regions in 2016. The region ranked 5th in terms of the industry's share of regional employment.
- The proportion of labor income attributed to the region's travel and tourism industry in 2016 rose to 10.7% -- the 5th highest of PA's 11 tourism regions, while the employment share remained at 9.7%.

Travel Industry Share of Regional Economy



Dutch Country Roads – Traveler Spending & Employment Timelines

DUTCH COUNTRY ROADS TRAVELER SPENDING, 2006 – 2016 (dollar amounts in millions)

County	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Adams	\$502.2	\$535.1	\$602.8	\$520.9	\$555.8	\$608.0	\$628.8	\$671.8	\$666.0	\$686.7	\$691.2
Berks	650.6	668.1	746.9	623.7	687.7	762.7	794.8	807.3	795.8	824.4	857.0
Cumberland	657.6	674.9	774.2	628.3	677.8	726.7	749.8	760.3	774.0	816.6	838.7
Dauphin	1,801.6	1,867.7	2,142.4	1,878.7	2,013.3	2,135.1	2,213.7	2,286.3	2,314.8	2,335.9	2,356.2
Franklin	259.6	280.8	322.2	270.2	286.5	298.0	314.8	323.4	324.3	326.7	317.6
Lancaster	1,464.4	1,498.0	1,706.5	1,523.1	1,669.7	1,792.7	1,817.5	1,854.9	1,919.9	1,975.4	2,065.6
Lebanon	154.8	158.9	182.2	159.9	170.9	185.6	192.6	193.9	200.9	201.4	205.6
Perry	42.9	44.2	48.6	40.6	43.6	48.7	46.8	46.9	47.4	47.9	48.3
York	741.2	764.3	829.2	706.5	753.5	850.2	885.1	907.5	923.0	943.7	973.6
Region Total	\$6,274.7	\$6,491.9	\$7,355.2	\$6,351.8	\$6,858.9	\$7,407.6	\$7,643.8	\$7,852.4	\$7,966.1	\$8,158.8	\$8,353.9
% Change	3.5%	3.5%	13.3%	-13.6%	8.0%	8.0%	3.2%	2.7%	1.4%	2.4%	2.4%

DUTCH COUNTRY ROADS TRAVEL INDUSTRY EMPLOYMENT, 2006 – 2016

County	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Adams	4,830	4,972	5,063	4,835	4,771	4,788	4,866	5,080	5,074	5,105	5,199
Berks	6,182	6,401	6,490	6,067	6,173	6,238	6,468	6,577	6,564	6,622	6,828
Cumberland	6,280	6,327	6,408	5,909	5,812	5,935	6,068	6,152	6,215	6,239	6,304
Dauphin	17,769	18,141	18,282	17,583	17,735	17,887	18,533	18,724	18,709	18,846	19,036
Franklin	2,385	2,462	2,473	2,298	2,276	2,288	2,352	2,438	2,438	2,444	2,513
Lancaster	14,637	14,696	14,766	14,381	14,640	14,753	15,239	15,478	15,731	15,853	16,310
Lebanon	1,636	1,636	1,627	1,544	1,534	1,562	1,609	1,654	1,667	1,655	1,695
Perry	301	304	309	296	302	310	321	327	328	340	347
York	7,560	7,741	7,656	7,213	7,038	7,165	7,421	7,525	7,637	7,709	7,912
Region Total	61,580	62,680	63,074	60,127	60,281	60,927	62,877	63,955	64,363	64,814	66,145
% Change	2.1%	1.8%	0.6%	-4.7%	0.3%	1.1%	3.2%	1.7%	0.6%	0.7%	2.1%

Dutch Country Roads – Traveler Spending by Category

DUTCH COUNTRY ROADS TRAVELER SPENDING BY CATEGORY, 2015 and 2016 (dollar amounts in millions)

2016	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Adams	\$92.9	\$141.1	\$126.8	\$165.0	\$165.4	\$691.2
Berks	92.0	195.6	159.5	150.9	259.0	857.0
Cumberland	124.6	199.3	143.0	142.5	229.3	838.7
Dauphin	386.5	458.1	360.3	571.3	580.0	2,356.2
Franklin	35.6	75.4	54.0	59.5	93.1	317.6
Lancaster	298.8	440.3	402.0	387.4	537.0	2,065.6
Lebanon	17.9	51.1	42.0	36.1	58.5	205.6
Perry	2.1	12.1	8.9	7.9	17.4	48.3
York	112.3	226.9	174.1	171.6	288.6	973.6
Region Total	\$1,162.8	\$1,799.9	\$1,470.7	\$1,692.2	\$2,228.4	\$8,353.9
% Change	4.3%	3.2%	1.0%	3.9%	0.6%	2.4%

2015	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Adams	\$91.4	\$139.7	\$127.7	\$159.6	\$168.3	\$686.7
Berks	85.2	187.3	155.2	143.6	253.1	824.4
Cumberland	119.5	192.5	142.6	135.3	226.7	816.6
Dauphin	375.9	448.1	359.1	558.5	594.3	2,335.9
Franklin	36.7	74.8	56.3	59.0	99.9	326.7
Lancaster	281.6	422.1	394.6	368.3	508.9	1,975.4
Lebanon	17.1	49.9	41.2	35.1	58.1	201.4
Perry	2.1	11.8	8.8	7.4	17.9	47.9
York	105.4	217.6	170.2	162.5	288.1	943.7
Region Total	\$1,114.9	\$1,743.7	\$1,455.5	\$1,629.4	\$2,215.3	\$8,158.8

Dutch Country Roads – Tourism Satellite Account

DUTCH COUNTRY ROADS TOURISM SATELLITE ACCOUNT CATEGORIES, 2015 and 2016 (dollar amounts in millions)				
	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
2016				
Adams	\$691.2	\$2.8	\$30.7	\$724.8
Berks	857.0	2.9	38.1	898.0
Cumberland	838.7	2.6	37.2	878.5
Dauphin	2,356.2	12.7	104.6	2,473.6
Franklin	317.6	0.8	14.1	332.6
Lancaster	2,065.6	9.3	91.7	2,166.6
Lebanon	205.6	0.5	9.1	215.3
Perry	48.3	0.0	2.1	50.5
York	973.6	3.2	43.2	1,020.0
Region Total	\$8,353.9	\$34.9	\$370.9	\$8,759.8
% Change	2.4%	10.6%	-13.4%	1.6%
2015				
Adams	\$686.7	\$2.7	\$36.1	\$725.5
Berks	824.4	2.6	43.3	870.3
Cumberland	816.6	2.3	42.9	861.7
Dauphin	2,335.9	12.1	122.6	2,470.6
Franklin	326.7	0.8	17.2	344.7
Lancaster	1,975.4	8.5	103.7	2,087.7
Lebanon	201.4	0.4	10.6	212.3
Perry	47.9	0.0	2.5	50.5
York	943.7	2.2	49.5	995.4
Region Total	\$8,158.8	\$31.6	\$428.4	\$8,618.8

*Non-Traveler Personal Consumption Expenditures represent travel-related consumer durable purchases, such as an RV, boat, or furniture for a vacation home.

Dutch Country Roads – Travel Industry Impacts, 2015 & 2016

DUTCH COUNTRY ROADS TRAVEL INDUSTRY IMPACTS, 2015 and 2016 (dollar amounts in millions)

2016	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Adams	\$691.2	5,199	\$146.7	\$38.3	\$33.9
Berks	857.0	6,828	200.7	48.7	44.6
Cumberland	838.7	6,304	175.1	45.3	40.7
Dauphin	2,356.2	19,036	645.6	147.4	135.3
Franklin	317.6	2,513	68.8	17.3	15.7
Lancaster	2,065.6	16,310	437.3	115.2	101.0
Lebanon	205.6	1,695	54.7	12.1	11.6
Perry	48.3	347	8.0	2.3	2.1
York	973.6	7,912	225.2	54.9	50.2
Region Total	\$8,353.9	66,145	\$1,962.0	\$481.5	\$435.1
% Change	2.4%	2.1%	3.0%	2.5%	3.8%

2015	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Adams	\$686.7	5,105	\$144.4	\$38.1	\$33.1
Berks	824.4	6,622	195.2	47.2	42.7
Cumberland	816.6	6,239	170.7	44.3	39.2
Dauphin	2,335.9	18,846	627.9	145.3	131.2
Franklin	326.7	2,444	68.2	17.6	15.7
Lancaster	1,975.4	15,853	419.2	110.7	95.7
Lebanon	201.4	1,655	53.7	11.8	11.3
Perry	47.9	340	8.0	2.3	2.0
York	943.7	7,709	217.9	52.6	48.1
Region Total	\$8,158.8	64,814	\$1,905.3	\$469.9	\$419.0

Dutch Country Roads – Travel Economy Impacts, 2015 & 2016

DUTCH COUNTRY ROADS TRAVEL ECONOMY IMPACTS, 2015 and 2016 (dollar amounts in millions)

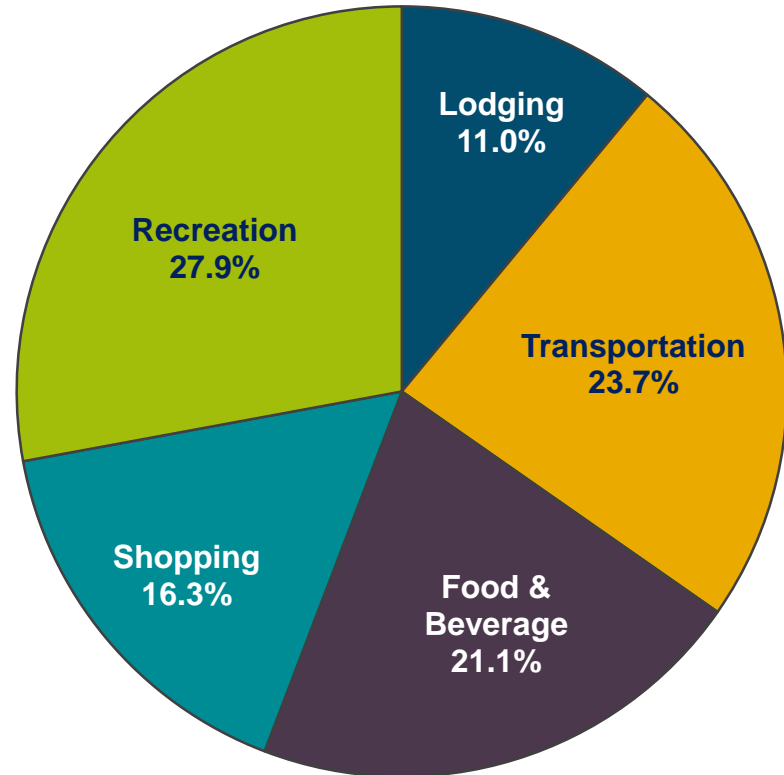
2016	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Adams	\$724.8	7,858	\$287.0	\$66.3	\$68.2
Berks	898.0	11,369	390.9	84.8	89.8
Cumberland	878.5	9,754	340.9	79.0	81.9
Dauphin	2,473.6	26,926	1,256.6	253.9	272.9
Franklin	332.6	4,207	134.7	30.2	31.7
Lancaster	2,166.6	24,754	844.8	198.6	203.4
Lebanon	215.3	3,002	106.9	21.3	23.4
Perry	50.5	740	15.8	4.1	4.2
York	1,020.0	12,968	439.4	95.7	101.2
Region Total	\$8,759.8	101,579	\$3,816.9	\$833.9	\$876.7
% Change	1.6%	2.1%	2.6%	2.0%	3.8%

2015	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Adams	\$725.5	7,707	\$281.8	\$66.1	\$66.6
Berks	870.3	11,049	381.1	82.5	86.1
Cumberland	861.7	9,652	333.3	77.5	79.0
Dauphin	2,470.6	26,605	1,225.8	251.1	264.7
Franklin	344.7	4,099	133.1	30.9	31.6
Lancaster	2,087.7	24,060	818.4	191.6	192.8
Lebanon	212.3	2,940	104.8	20.9	22.7
Perry	50.5	723	15.6	4.1	4.1
York	995.4	12,627	425.4	92.6	97.0
Region Total	\$8,618.8	99,462	\$3,719.3	\$817.2	\$844.5

Lehigh Valley

- The Lehigh Valley region is comprised the following counties: Lehigh and Northampton.
- Travelers spent nearly \$2.2 billion in the Lehigh Valley region in 2016 – a new record high and a 4.3% increase from 2015, which was once again the second largest percentage increase of the state’s 11 tourism regions and the fourth largest in dollar terms.
- With its close proximity to the NY and NJ markets, a strong day-trip market, and numerous regional attractions, the Lehigh Valley region continued to have the highest proportion of traveler spending on recreation among PA’s tourism regions and the lowest share spent on transportation in 2016.

Lehigh Valley Region 2016 Spending by Category

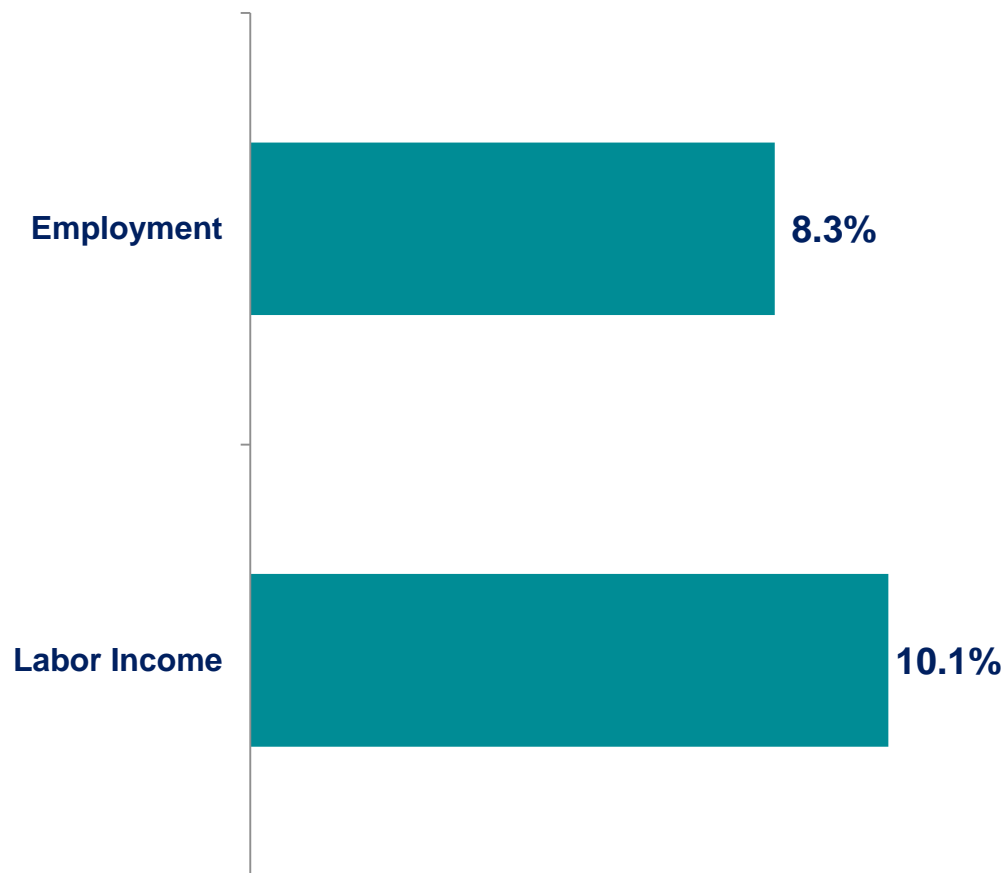


Source: Tourism Economics

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.
- As in 2015, the region ranked 6th among the state's 11 tourism regions in the actual number of travel-supported jobs and 9th in terms of the industry's share of regional employment in 2016.
- The travel industry was responsible for 10.1% of the region's labor income in 2016 – almost a percentage point above the industry's 9.2% share in 2015.

Travel Industry Share of Regional Economy



Lehigh Valley – Traveler Spending & Employment Timelines

LEHIGH VALLEY TRAVELER SPENDING, 2006 – 2016 (dollar amounts in millions)

County	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Lehigh	\$891.2	\$952.9	\$1,061.4	\$872.1	\$925.4	\$996.3	\$1,030.7	\$1,041.7	\$1,054.4	\$1,127.8	\$1,169.4
Northampton	494.2	517.7	581.2	518.3	596.1	761.4	827.0	863.9	921.8	981.5	1,029.6
Region Total	\$1,385.4	\$1,470.6	\$1,642.6	\$1,390.4	\$1,521.4	\$1,757.7	\$1,857.7	\$1,905.6	\$1,976.2	\$2,109.4	\$2,199.1
% Change	3.4%	6.2%	11.7%	-15.4%	9.4%	15.5%	5.7%	2.6%	3.7%	6.7%	4.3%

LEHIGH VALLEY TRAVEL INDUSTRY EMPLOYMENT, 2006 – 2016

County	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Lehigh	8,160	8,242	8,274	7,732	7,555	7,624	7,838	7,970	7,983	8,119	8,356
Northampton	4,938	5,111	5,208	5,074	5,448	5,816	6,180	6,789	6,920	7,127	7,407
Region Total	13,098	13,353	13,482	12,806	13,003	13,440	14,018	14,760	14,903	15,246	15,763
% Change	0.4%	1.9%	1.0%	-5.0%	1.5%	3.4%	4.3%	5.3%	1.0%	2.3%	3.4%

Lehigh Valley –Traveler Spending by Category

LEHIGH VALLEY TRAVELER SPENDING BY CATEGORY, 2015 and 2016 (dollar amounts in millions)

2016	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Lehigh	\$134.5	\$279.0	\$228.3	\$235.2	\$292.5	\$1,169.4
Northampton	106.7	184.6	130.0	378.9	229.4	1,029.6
Region Total	\$241.2	\$463.6	\$358.3	\$614.1	\$521.9	\$2,199.1
% Change	4.8%	4.4%	2.1%	8.4%	0.8%	4.3%

2015	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Lehigh	\$127.2	\$265.8	\$222.1	\$222.6	\$290.1	\$1,127.8
Northampton	102.9	178.2	128.7	343.9	227.8	981.5
Region Total	\$230.1	\$444.0	\$350.8	\$566.6	\$517.9	\$2,109.4

Lehigh Valley – Tourism Satellite Account

LEHIGH VALLEY TOURISM SATELLITE ACCOUNT CATEGORIES, 2015 and 2016 (dollar amounts in millions)				
2016	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Lehigh	\$1,169.4	\$3.7	\$51.9	\$1,225.0
Northampton	1,029.6	3.2	45.7	1,078.5
Region Total	\$2,199.1	\$6.8	\$97.6	\$2,303.5
% Change	4.3%	6.8%	-11.8%	3.5%
2015	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Lehigh	\$1,127.8	\$3.5	\$59.2	\$1,190.5
Northampton	981.5	2.9	51.5	1,036.5
Region Total	\$2,109.4	\$6.4	\$110.8	\$2,226.5

*Non-Traveler Personal Consumption Expenditures represent travel-related consumer durable purchases, such as an RV, boat, or furniture for a vacation home.

Lehigh Valley –Travel Industry Impacts, 2015 & 2016

LEHIGH VALLEY TRAVEL INDUSTRY IMPACTS, 2015 and 2016 (dollar amounts in millions)

2016	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Lehigh	\$1,169.4	8,356	\$260.9	\$64.9	\$59.0
Northampton	1,029.6	7,407	329.3	66.4	65.6
Region Total	\$2,199.1	15,763	\$590.2	\$131.1	\$124.6
% Change	4.3%	3.4%	4.4%	3.8%	5.4%

2015	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Lehigh	\$1,127.8	8,119	\$247.2	\$62.6	\$55.7
Northampton	981.5	7,127	318.0	64.0	62.6
Region Total	\$2,109.4	15,246	\$565.2	\$126.6	\$118.3

Lehigh Valley –Travel Economy Impacts, 2015 & 2016

LEHIGH VALLEY TRAVEL ECONOMY IMPACTS, 2015 and 2016 (dollar amounts in millions)

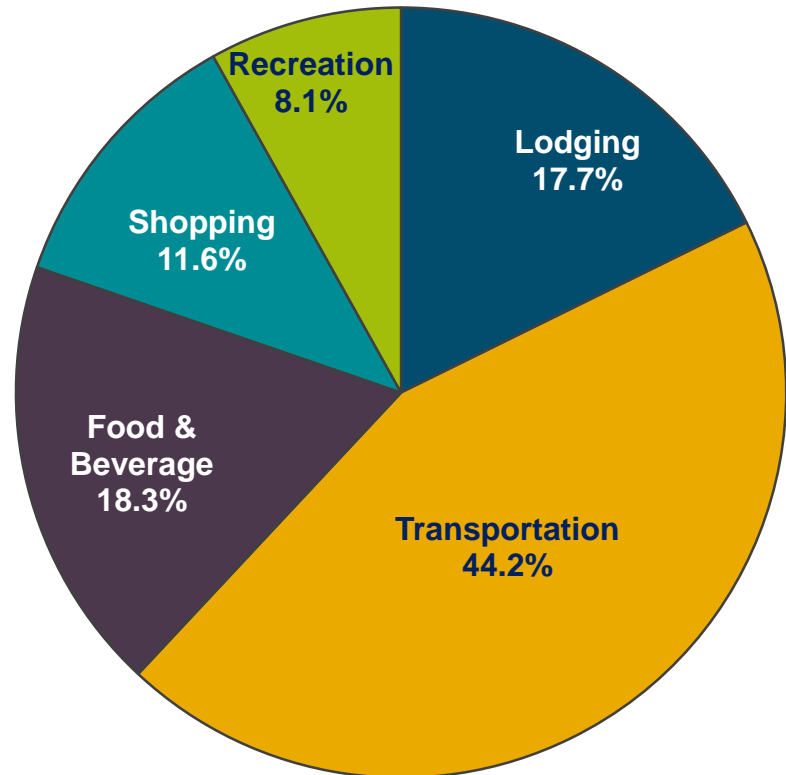
2016	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Lehigh	\$1,225.0	13,195	\$506.3	\$113.2	\$118.9
Northampton	1,078.5	11,555	638.8	116.6	132.4
Region Total	\$2,303.5	24,750	\$1,145.2	\$229.8	\$251.3
% Change	3.5%	3.3%	3.8%	3.5%	5.3%

2015	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Lehigh	\$1,190.5	12,836	\$479.5	\$109.3	\$112.2
Northampton	1,036.5	11,120	566.7	112.6	126.3
Region Total	\$2,226.5	23,956	\$1,046.2	\$221.9	\$238.6

Philadelphia & The Countryside

- Philadelphia and The Countryside region is comprised of the following counties: Bucks, Chester, Delaware, Montgomery, and Philadelphia.
- Travelers spent nearly \$9.7 billion in the Philadelphia & The Countryside region in 2016 – a new record high and a 3.3% increase from 2015.
- As in prior years, the region continued to have the highest proportion of traveler spending on transportation and lodging and the lowest proportions on recreation, food & beverages, and shopping of the state's 11 tourism regions in 2016.

**Philadelphia & The Countryside Region
2016 Spending by Category**

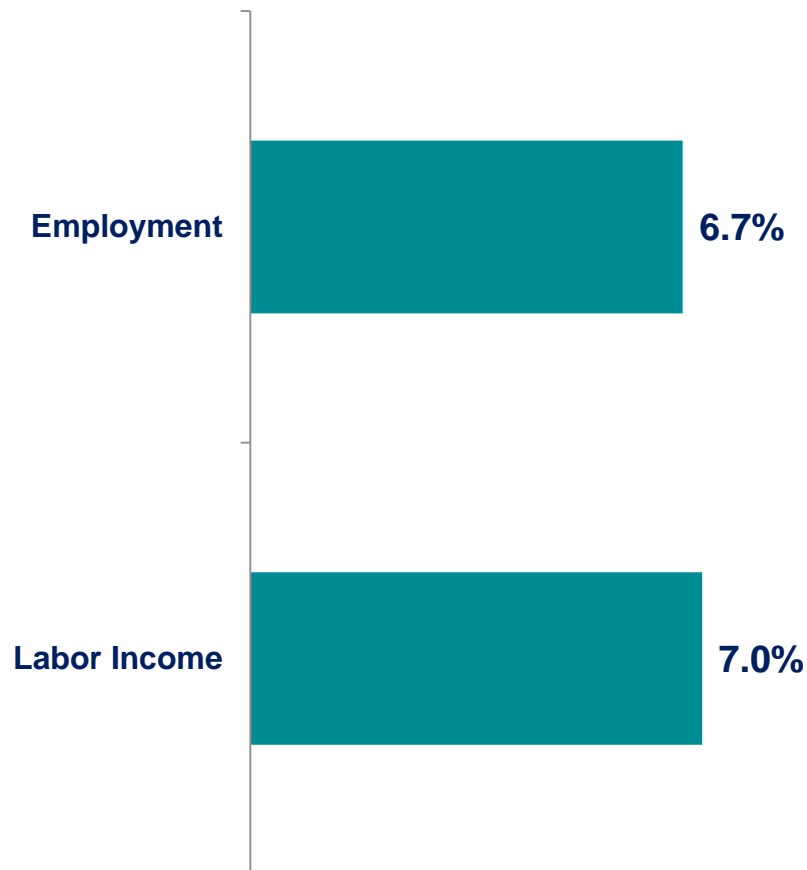


Source: Tourism Economics

Philadelphia and The Countryside

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total economy.
- The region continued to have the highest number of jobs supported by the travel industry among the state's tourism regions in 2016, but the industry's contributions to labor income and employment were the smallest of the state's tourism regions due to the size and great diversity of the region's economy.
- The travel-supported labor income share for the Philadelphia and the Countryside region was 7.0% in 2016 – a 0.4 percentage point increase from 2015, and above the industry's share of the region's employment base.

Travel Industry Share of Regional Economy



Philadelphia & The Countryside – Traveler Spending & Employment Timelines

PHILADELPHIA AND THE COUNTRYSIDE TRAVELER SPENDING, 2006 – 2016 (dollar amounts in millions)

County	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Bucks	\$602.8	\$640.3	\$704.5	\$629.2	\$673.2	\$728.0	\$743.6	\$742.1	\$759.9	\$795.5	\$813.9
Chester	557.7	595.5	680.1	608.2	646.7	684.2	713.8	730.4	735.6	760.1	772.6
Delaware	510.7	558.2	613.9	530.4	564.5	654.5	645.8	642.1	655.4	658.6	667.9
Montgomery	1,014.0	1,079.3	1,176.2	1,014.2	1,070.8	1,180.2	1,221.8	1,244.9	1,271.9	1,327.0	1,360.9
Philadelphia	4,673.9	4,879.8	5,334.7	4,736.2	5,044.0	5,290.9	5,389.9	5,590.6	5,683.1	5,836.8	6,074.4
Region Total	\$7,359.0	\$7,753.2	\$8,509.5	\$7,518.1	\$7,999.1	\$8,537.9	\$8,714.9	\$8,950.1	\$9,105.9	\$9,378.1	\$9,689.7
% Change	5.0%	5.4%	9.8%	-11.7%	6.4%	6.7%	2.1%	2.7%	1.7%	2.8%	3.3%

PHILADELPHIA AND THE COUNTRYSIDE TRAVEL INDUSTRY EMPLOYMENT, 2006 – 2016

County	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Bucks	8,280	8,545	8,795	8,482	8,389	8,568	8,717	8,776	8,850	8,999	9,161
Chester	6,944	7,172	7,286	6,983	6,823	6,879	7,052	7,176	7,288	7,397	7,499
Delaware	6,965	6,931	6,936	6,701	6,697	6,936	7,158	7,360	7,486	7,535	7,696
Montgomery	12,822	12,909	12,983	12,380	12,159	12,337	13,008	13,366	13,430	13,618	13,965
Philadelphia	32,640	33,719	33,755	31,929	32,221	32,669	33,628	34,415	34,803	35,577	36,361
Region Total	67,651	69,275	69,755	66,474	66,289	67,390	69,563	71,093	71,857	73,127	74,682
% Change	2.0%	2.4%	0.7%	-4.7%	-0.3%	1.7%	3.2%	2.2%	1.1%	1.8%	2.1%

Philadelphia & The Countryside – Traveler Spending by Category

PHILADELPHIA AND THE COUNTRYSIDE TRAVELER SPENDING BY CATEGORY, 2015 and 2016 (dollar amounts in millions)

2016	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Bucks	\$144.7	\$181.5	\$120.4	\$86.7	\$280.7	\$813.9
Chester	144.5	174.0	120.0	82.2	251.9	772.6
Delaware	106.7	157.2	97.4	76.0	230.6	667.9
Montgomery	350.5	264.7	171.5	98.7	475.5	1,360.9
Philadelphia	965.7	1,000.1	615.8	445.8	3,046.9	6,074.4
Region Total	\$1,712.2	\$1,777.4	\$1,125.1	\$789.4	\$4,285.6	\$9,689.7
% Change	6.9%	4.4%	3.2%	5.4%	1.2%	3.3%

2015	Lodging	Food & Beverage	Retail	Recreation	Transportation	Total
Bucks	\$139.0	\$175.8	\$119.3	\$82.3	\$279.0	\$795.5
Chester	135.5	167.7	115.6	77.4	263.9	760.1
Delaware	102.0	152.0	94.8	73.4	236.3	658.6
Montgomery	330.8	254.8	165.9	93.6	481.9	1,327.0
Philadelphia	893.9	952.1	594.5	422.5	2,973.9	5,836.8
Region Total	\$1,601.2	\$1,702.5	\$1,090.2	\$749.2	\$4,235.0	\$9,378.1

Philadelphia & The Countryside – Tourism Satellite Account

PHILADELPHIA AND THE COUNTRYSIDE TOURISM SATELLITE ACCOUNT CATEGORIES, 2015 and 2016 (dollar amounts in millions)

	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
2016				
Bucks	\$813.9	\$3.5	\$36.1	\$853.5
Chester	772.6	3.4	34.3	810.4
Delaware	667.9	2.9	29.7	700.4
Montgomery	1,360.9	5.3	60.4	1,426.6
Philadelphia	6,074.4	68.1	269.7	6,412.1
Region Total	\$9,689.7	\$83.2	\$430.2	\$10,203.1
% Change	3.3%	12.5%	-12.6%	2.6%

	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
2015				
Bucks	\$795.5	\$3.2	\$41.8	\$840.5
Chester	760.1	3.1	39.9	803.2
Delaware	658.6	2.7	34.6	695.9
Montgomery	1,327.0	4.9	69.7	1,401.6
Philadelphia	5,836.8	60.0	306.5	6,203.3
Region Total	\$9,378.1	\$73.9	\$492.4	\$9,944.4

Philadelphia & The Countryside – Travel Industry Impacts, 2015 & 2016

PHILADELPHIA AND THE COUNTRYSIDE TRAVEL INDUSTRY IMPACTS, 2015 and 2016 (dollar amounts in millions)

2016	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Bucks	\$813.9	9,161	\$281.6	\$55.5	\$54.8
Chester	772.6	7,499	262.9	52.4	51.4
Delaware	667.9	7,696	288.7	51.0	52.8
Montgomery	1,360.9	13,965	519.2	96.8	98.2
Philadelphia	6,074.4	36,361	1,912.6	438.5	382.8
Region Total	\$9,689.7	74,682	\$3,265.0	\$694.3	\$640.0
% Change	3.3%	2.1%	1.9%	3.2%	3.2%

2015	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Bucks	\$795.5	8,999	\$271.8	\$54.0	\$52.6
Chester	760.1	7,397	254.7	51.2	49.6
Delaware	658.6	7,535	280.1	49.9	51.1
Montgomery	1,327.0	13,618	503.3	94.3	94.6
Philadelphia	5,836.8	35,577	1,894.3	423.4	372.4
Region Total	\$9,378.1	73,127	\$3,204.1	\$672.9	\$620.3

Philadelphia & The Countryside – Travel Economy Impacts, 2015 & 2016

PHILADELPHIA AND THE COUNTRYSIDE TRAVEL ECONOMY IMPACTS, 2015 and 2016 (dollar amounts in millions)

2016	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Bucks	\$853.5	16,174	\$547.9	\$96.8	\$110.6
Chester	810.4	13,081	511.0	91.3	103.8
Delaware	700.4	13,633	559.9	89.3	106.8
Montgomery	1,426.6	23,838	1,002.8	169.6	198.4
Philadelphia	6,412.1	58,304	3,748.4	732.2	772.8
Region Total	\$10,203.1	125,030	\$6,370.0	\$1,179.2	\$1,292.5
% Change	2.6%	2.3%	1.8%	2.5%	3.1%

2015	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Bucks	\$840.5	15,835	\$530.6	\$94.5	\$106.3
Chester	803.2	12,805	497.2	89.5	100.2
Delaware	695.9	13,360	546.7	87.6	103.3
Montgomery	1,401.6	23,246	982.5	165.7	191.2
Philadelphia	6,203.3	56,945	3,697.9	712.8	752.1
Region Total	\$9,944.4	122,191	\$6,254.8	\$1,150.1	\$1,253.1

Explanations
Data Sources
Methodology
Tourism Economics



**TOURISM
ECONOMICS**

AN OXFORD ECONOMICS COMPANY

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 manner as other economic sectors – i.e., tax generation, employment, wages, and gross domestic product.

Why is this a challenge?

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

The Tourism Satellite Account

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

Benefits of the Tourism Satellite Account

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.

Data Sources

- Domestic traveler expenditure estimates are derived from a representative survey of U.S. travelers provided by Longwoods International. The estimates are broken out by sectors (lodging, transport at destination, food & beverage, retail, and recreation), by purpose (business and leisure), and by type of stay (day and overnight).
- Tourism Economics (TE) then adjusts these levels of spending based on a range of known measures of travel and tourism activity:
 - Overseas traveler spending (source: National Travel and Tourism Office, TE)
 - Canadian traveler 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: U.S. Bureau of Economic Analysis, U.S. Bureau of Labor Statistics, U.S. Census Bureau)

Methodology

- An IMPLAN model was compiled for the Commonwealth of Pennsylvania, tracing the flow of traveler-related expenditures through the local economy and their effects on employment, wages, and taxes. The IMPLAN model also provides estimates of the indirect (supplier) and induced (income) impacts of travel and tourism.
- All results are benchmarked and cross-checked and adjusted based on the following:
 - U.S. Bureau of Labor Statistics and Bureau of Economic Analysis (employment and wages by industry)
 - U.S. Census (business sales by industry)
- Employment rankings are based on U.S. Bureau of Labor Statistics employment statistics (ES202/QCEW) data.

About Tourism Economics

Tourism Economics is an Oxford Economics company with a singular objective: combine an understanding of tourism dynamics with rigorous economics in order to answer the most important questions facing destinations, developers, and strategic planners. By combining quantitative methods with industry knowledge, Tourism Economics designs custom market strategies, destination recovery plans, tourism forecasting models, tourism policy analysis, and economic impact studies.

With over four decades of experience of our principal consultants, it is our passion to work as partners with our clients to achieve a destination's full potential.

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 enjoys a reputation for high quality, quantitative analysis and evidence-based advice. For this, it draws on its own staff of more than 120 professional economists; a dedicated data analysis team; global modeling tools, and a range of partner institutions in Europe, the US and in the United Nations Project Link. Oxford Economics has offices in London, Oxford, Dubai, Philadelphia, and Belfast.

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