

The Economic Impact of Travel in Pennsylvania

Tourism Satellite Account
Calendar Year 2017



TOURISM
ECONOMICS

AN OXFORD ECONOMICS COMPANY

Table of Contents

Key Definitions.....	3
State Overview	7
Detailed Pennsylvania Results.....	13
PA’s Domestic Travel & Tourism Market.....	25
PA’s Travel & Tourism <u>Industry</u> Impacts.....	35
PA’s Travel & Tourism Economy	41
PA’s Travel & Tourism <u>Economy</u> Impacts	47
Regional and County Results.....	58
Explanations, Data Sources, and Methodology.....	146
Background.....	153

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.

State Overview



TOURISM
ECONOMICS

AN OXFORD ECONOMICS COMPANY

The number of travelers and travel-related spending rose in 2017 as economic conditions continued to help spur travel to/within Pennsylvania.

Key facts about Pennsylvania's travel industry

The total number of domestic + international travelers reached a record high 204.4 million in 2017.

Total traveler spending rose 4.2% in 2017 to \$43.3 billion.

Traveler spending continued to support 6.6% of all jobs in PA.

Travel and tourism generated \$4.5 billion in PA state and local taxes in 2017.

Key travel industry impacts in Pennsylvania, 2017

Dollar amounts in billions

Traveler spending	\$43.326
Total jobs supported by travel industry	509,073
Jobs directly supported by travel	325,554
Income supported by travel industry	\$22.057
Taxes generated by travel industry	\$9.281
Federal	\$4.763
State	\$2.460
Local	\$2.058

Source: Tourism Economics

State Overview

- Spending by Pennsylvania travelers and tourists grew to \$43.3 billion in 2017 – the eighth consecutive year of growth. *(Note: Total traveler spending is also presented in the report as “travel & tourism industry sales.”)*
- Traveler spending accelerated in 2017, growing 4.2% from 2016 – a rate of increase that was 2.3 times the 1.8% rate of increase in 2016.
 - An estimated 204.4 million visitors traveled to and/or within Pennsylvania in 2017, a 2.6% increase from the 199.2 million in 2016. (Note: Total includes both leisure and business travel, as well as domestic and international segments, measured in “person-trips.”)
 - The increase in the number of U.S. travelers was largely responsible for the 4.2% increase in traveler spending, with both the business and leisure travel segments contributing to the increased spending.
 - The generally low inflation environment and the stronger economy in terms of job gains were responsible for the strong increase in traveler spending.
- Spending by travelers and travel-related businesses generated an estimated \$74.7 billion in total economic activity (including indirect and induced impacts) throughout all industries in Pennsylvania in 2017.

Key Impacts

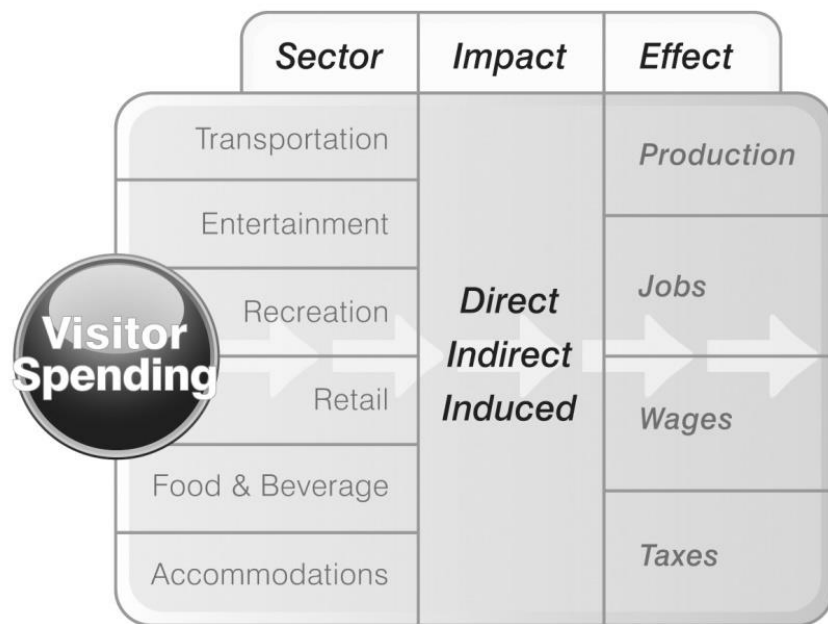
- Travel and tourism-related economic activity supported an estimated 509,100 PA jobs in total (*i.e., includes direct, indirect and induced jobs*) in 2017 – up 1.2% from 2016 and representing 6.6% of the state’s total employment.
- After far outpacing the growth rate of total non-farm jobs in the state in the past several years, the 1.2% growth rate for Pennsylvania’s travel-related (direct) and travel-supported (indirect and induced) jobs in 2017 was just slightly above the rate of increase for all other non-farm jobs in the state.
- The state’s travel and tourism sector was directly responsible for an estimated \$17.9 billion of the state’s 2017 Gross Domestic Product (GDP) – a 5.3% increase from 2016.
- Including indirect and induced impacts, PA’s travel and tourism industry generated \$4.5 billion in state & local taxes and \$4.8 billion in federal taxes.

Spending from every
400 travelers supports
one PA job

PA’s travel and tourism
industry supports one out of
every 15 PA workers

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**.

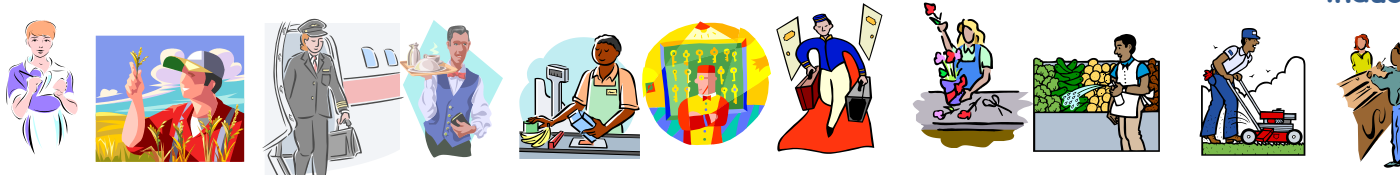
Wages paid to employees



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**.



Detailed State Results

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



**TOURISM
ECONOMICS**

AN OXFORD ECONOMICS COMPANY

Key Travel Trends in 2017

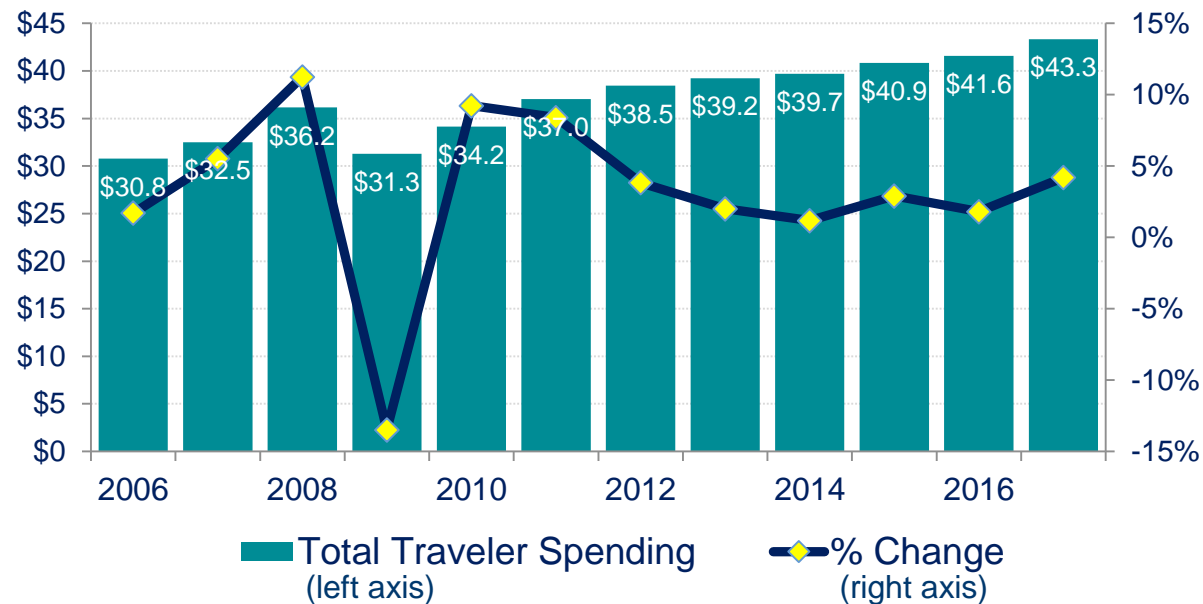
- Travel and tourism continued to be an integral part of Pennsylvania's economy in 2017, with traveler spending (*aka, "industry sales"*) directly injecting \$43.3 billion into the state's economy – a 4.2% increase from 2016 and new record high.
- In contrast to 2016, the 4.2% increase in total spending was derived from both the leisure and business travel segments with both contributing roughly equal amounts in dollar terms to 2017's strong growth in traveler spending.
- In percentage terms, the increase in spending by the business travel segment was especially strong, growing by nearly 14% in 2017 compared to the 2.5% growth rate in leisure travel spending.
- Spending increases were strong across the board with all industry sectors – from recreation (4.8%) to lodging (3.8%) to air transportation (5.1%) – posting strong year-over-year gains from 2016.
- In contrast to the previous three years when there was a continual drop in the total amount spent by travelers on transportation as the result of the drop in fuel prices, traveler spending on transportation rebounded in 2017 to a new record high (in nominal dollars).

Traveler Spending in PA Reaches New Record High in 2017

- Total spending by U.S. and international travelers and tourists in Pennsylvania reached a record high \$43.3 billion in 2017 – the eighth straight year total spending grew (includes spending by both business and leisure travelers, overnight and day-trip).
- Spending was up 4.2% from 2016 and, in contrast to recent years where growth was largely limited to the leisure segment, both leisure and business travel (overnight and day-trip) contributed to the increase in 2017.

Total traveler spending in Pennsylvania

(in billions of U.S. dollars)



Includes spending by both domestic and international travelers and business and leisure travel segments.

Source: Tourism Economics

PA 2017 Traveler Spending by Market Segment

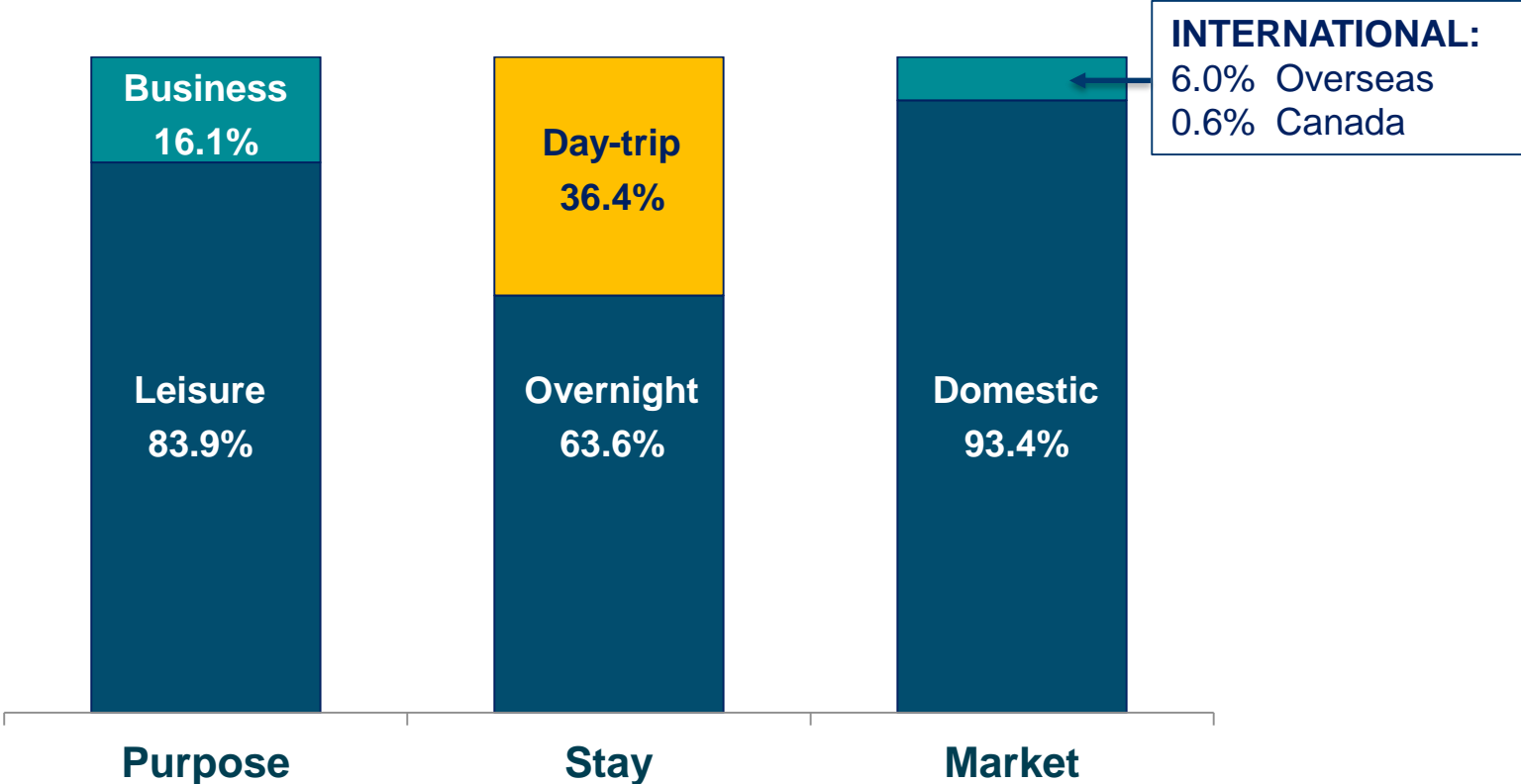
- In contrast to the last several years when spending by business travelers was largely unchanged, the growth in spending by PA's business travel segment in 2017 was far stronger than that of the leisure segment in percentage terms.
- Overnight travelers outspent day-trip travelers by \$11.8 billion in 2017, or by a factor of \$1.75 to \$1.00 – the same ratio as in 2016.

2017 Traveler Spending* by Segment					
(in billions of U.S. dollars)					
Purpose		Stay		Market	
Leisure	\$36.3	Overnight	\$27.6	U.S. Domestic	\$40.4
Business	\$ 7.0	Day-trip	\$15.8	Overseas	\$ 2.6
				Canada	\$ 0.3
Total	\$43.3	Total	\$43.3	Total	\$43.3
Growth Rate					
Leisure	2.5%	Overnight	4.8%	U.S. Domestic	4.3%
Business	13.8%	Day-trip	3.1%	Overseas	3.2%
Total	4.2%	Total	4.2%	Canada	0.0%
Market Share					
Leisure	83.9%	Overnight	63.6%	U.S. Domestic	93.4%
Business	16.1%	Day-trip	36.4%	Overseas	6.0%
				Canada	0.6%

*Includes the portion of travel expenses incurred getting to and from Pennsylvania and attributable to PA (e.g., gasoline purchased out of state but used in PA or portion of an airline ticket accruing to a PA airport along with the PA portion of the ticket a traveler bought leaving the state) as calculated by the Tourism Satellite Account (TSA) model. As such, the total for domestic spend on this slide is higher than the amount reported in the "Domestic Travel Market in Detail" section of this report.

Distribution of Traveler Spending by Market Segment

- As in prior years, U.S. domestic, total leisure, and total overnight travel remained the dominant segments for PA's travel and tourism industry in 2017.
- The share of total PA traveler spending attributable to the business travel segment rose almost a percentage point from the segment's share in 2016 as a result of the segment's exceptionally strong year-over-year increase.



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

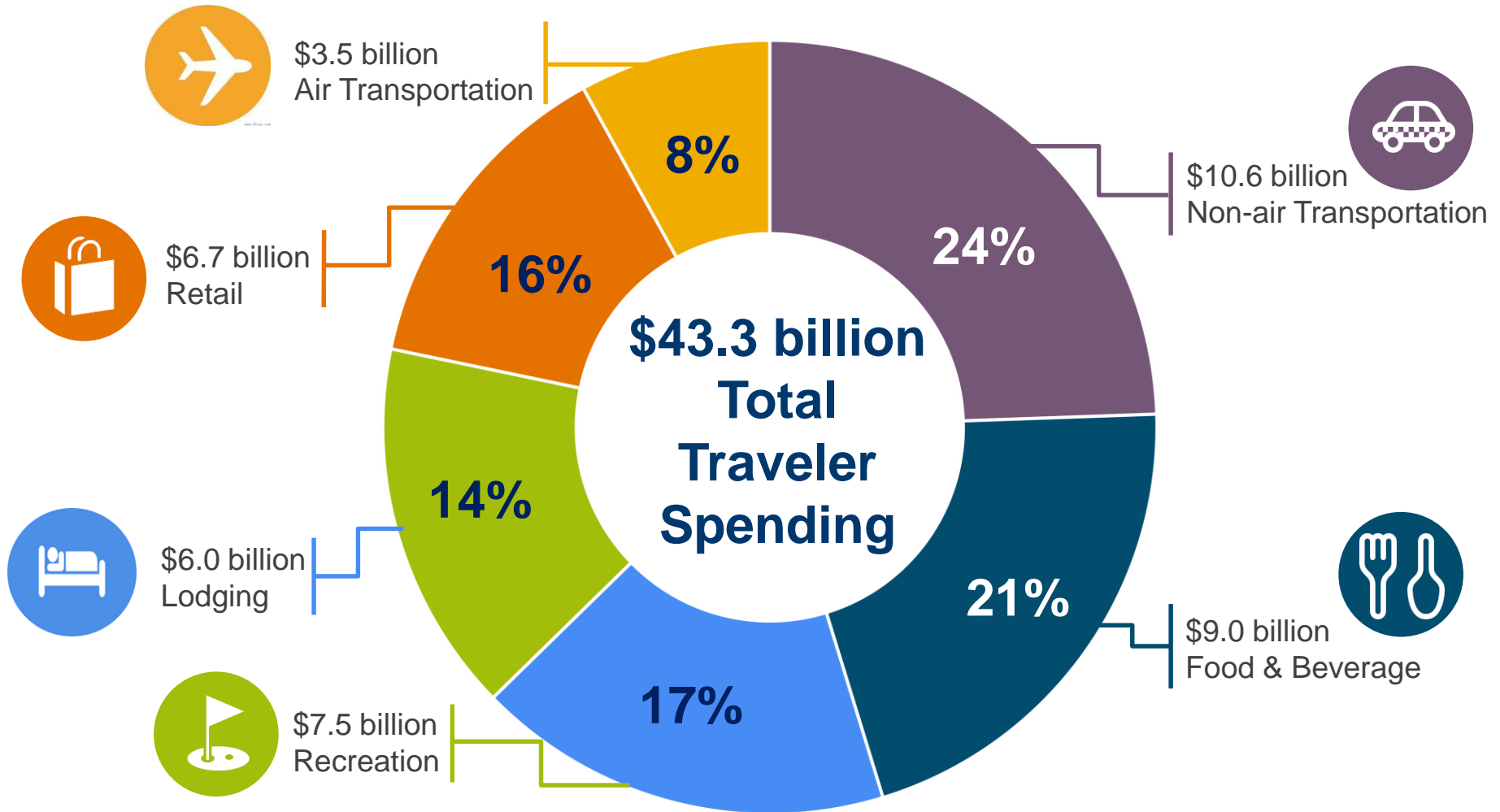
2017 Traveler Spending by Spending Category

- Total traveler spending rose 4.2% in 2017 – roughly 2.3 times the 1.8% pace of 2016, with all categories reaching new record highs in nominal dollars.
- The Compound Annual Growth Rate, or CAGR, is provided for the period 2011-2017. The CAGR shows the average (mean) annual growth rate for the period. The lodging sector had the strongest average growth rate for the period, followed by the recreation and food & beverage sectors.

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

Sector	2011	2012	2013	2014	2015	2016	2017	% Change	% CAGR Change
Lodging	\$4.792	\$4.955	\$5.047	\$5.283	\$5.528	\$5.737	\$5.953	3.8%	3.1%
Food & Beverage	\$7.400	\$7.529	\$7.822	\$8.093	\$8.399	\$8.622	\$9.021	4.6%	2.9%
Recreation	\$6.133	\$6.365	\$6.575	\$6.702	\$6.915	\$7.194	\$7.542	4.8%	3.0%
Retail	\$5.811	\$6.110	\$6.165	\$6.324	\$6.496	\$6.587	\$6.745	2.4%	2.2%
Non-Air Transportation	\$10.076	\$10.525	\$10.529	\$10.201	\$10.267	\$10.142	\$10.597	4.5%	0.7%
Air Transportation	\$2.881	\$2.968	\$3.085	\$3.085	\$3.248	\$3.299	\$3.467	5.1%	2.7%
TOTAL	\$37.034	\$38.453	\$39.224	\$39.688	\$40.854	\$41.581	\$43.326	4.2%	2.3%
% Change	8.4%	3.8%	2.0%	1.2%	2.9%	1.8%	4.2%		

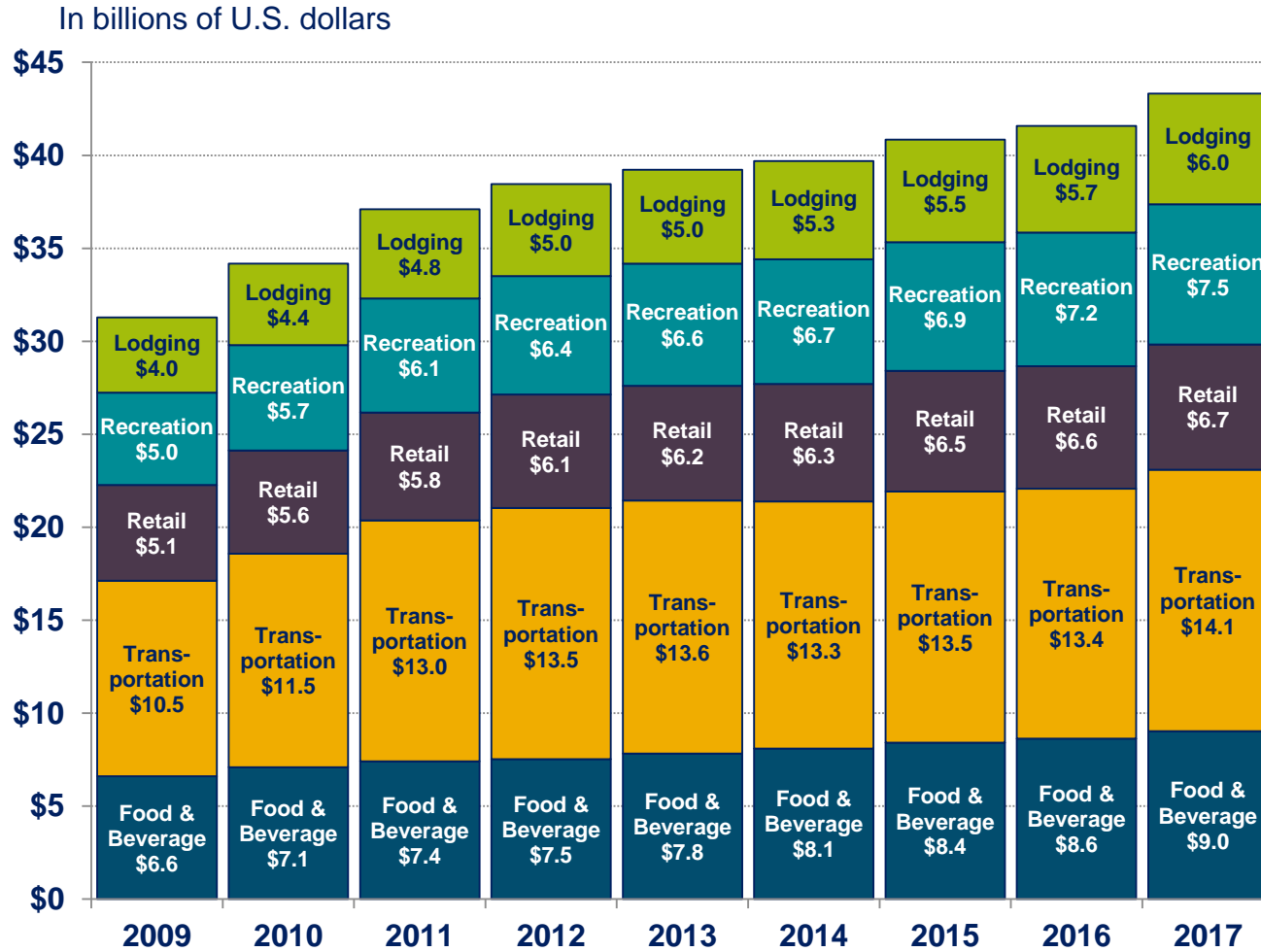
2017 Traveler Spending by Spending Category



Includes spending by all domestic and international travelers and travel segments (i.e., business and leisure, day-trip and overnight). "Recreation" includes spending at attractions and on activities including both indoor (e.g., bowling) and outdoor (e.g., hiking).

Source: *Tourism Economics*

PA Traveler Spending by Spending Category, 2009-2017

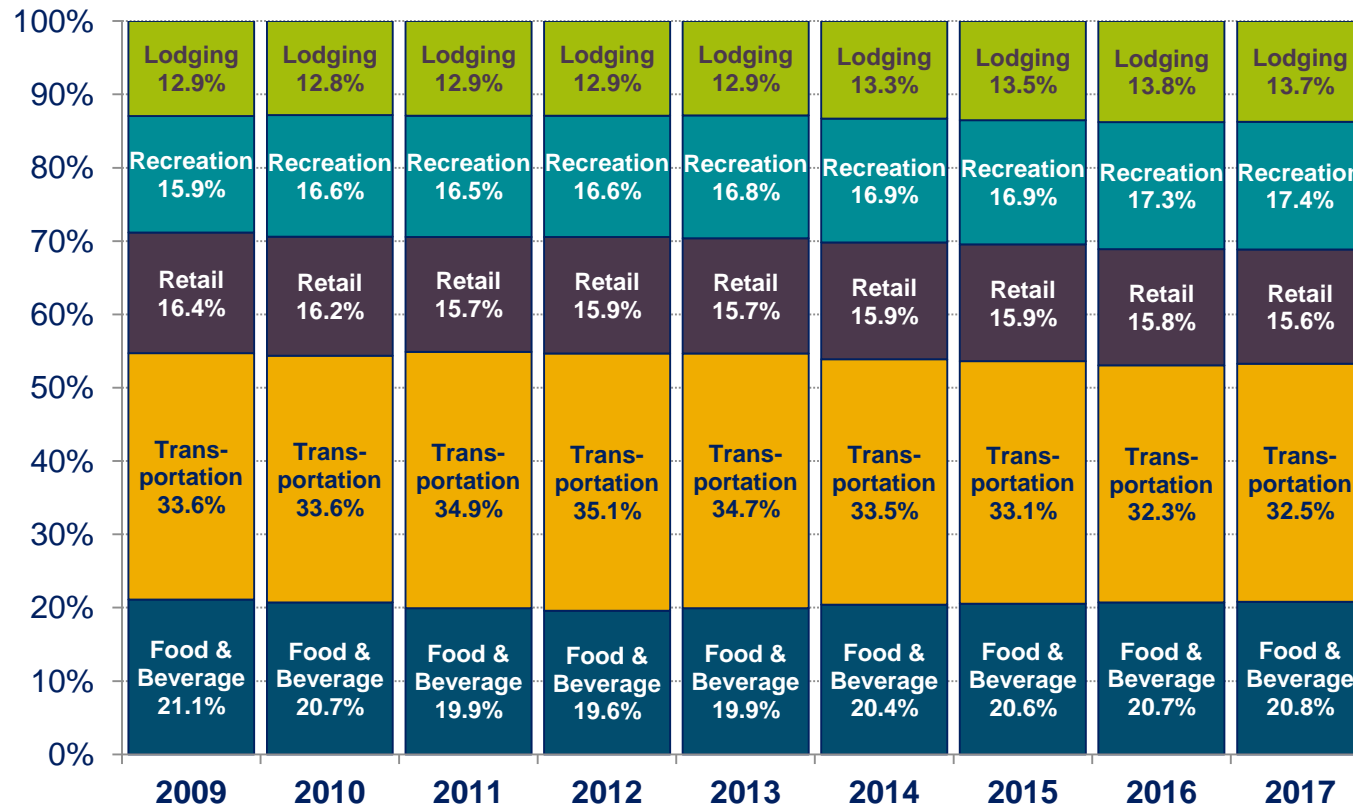


- Buoyed by strong employment gains and continuing to feel positive about their personal finances, consumers increased their spending on every travel category in 2017.
- Travelers continued to spend an increasing portion of their travel budgets on recreation with the sector growing by \$2.6 billion, or 52%, between 2009 and 2017. In percentage terms, this was the strongest growth of the five major categories of traveler spending during the period, followed by lodging (+47%).

Includes spending by domestic and international travelers, business and leisure segments.

Source: Tourism Economics

Share of Total Traveler Spending by Category, 2009-2017



- The recreation segment continued to capture an increased share of traveler spending – reaching a new high of 17.4% in 2017 – gaining almost a percentage point from 2009.
- Lodging was the only other industry that had a larger share of travelers’ budgets vs. 2009 of the five main categories of travel spending due to both rate increases and increased demand.
- Transportation continued to account for the largest share of traveler dollars in 2017, responsible for roughly a third of travelers’ trip budgets.

Includes spending by domestic and international travelers, business and leisure segments.

Source: Tourism Economics

Traveler Spending by Type of Visitor, 2016 & 2017

- The increase in total traveler spending in 2017 was derived from both the leisure and business travel segments.
- When measured in dollar terms, the increases were essentially the same for the two segments (\$0.9 billion), but the business segment far outpaced the leisure segment when the increases are measured in percentage terms.

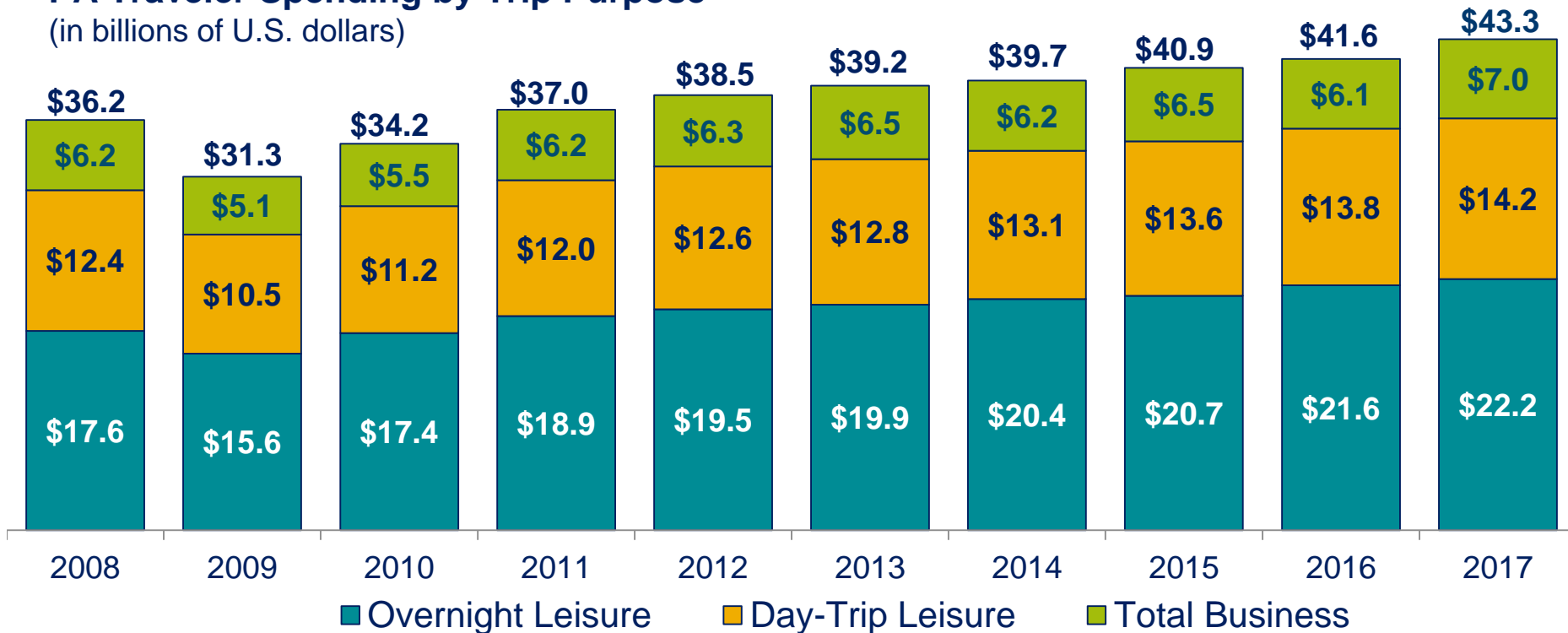
Traveler Spending by Visitor Type (in billions of U.S. dollars)			
2017	Leisure	Business	Total
Overnight	\$22.2	\$5.4	\$27.6
Day-Trip	\$14.2	\$1.6	\$15.8
Total	\$36.3	\$7.0	\$43.3
2016			
Overnight	\$21.6	\$4.7	\$26.3
Day-Trip	\$13.8	\$1.4	\$15.3
Total	\$35.4	\$6.1	\$41.6
Percent Change			
Overnight	2.7%	14.8%	4.8%
Day-Trip	2.3%	10.6%	3.1%
Total	2.5%	13.8%	4.2%

Total Traveler Spending by Trip Purpose, 2008 - 2017

- Leisure and business travelers were equally responsible for the increase in total traveler spending in 2017, though in percentage terms the business segment far outpaced leisure.
- The overnight segment was responsible for more than 75% of the \$1.7 billion increase in total traveler spending in 2017.

PA Traveler Spending by Trip Purpose

(in billions of U.S. dollars)



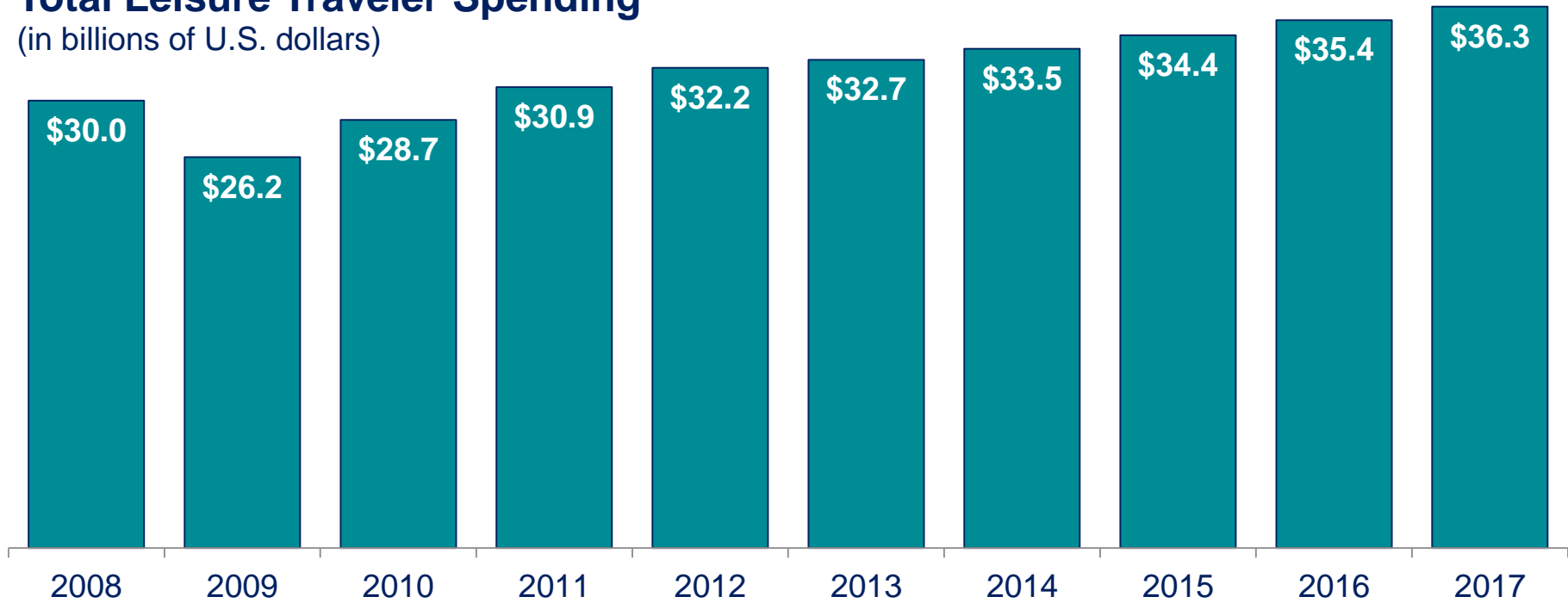
Source: Tourism Economics

Total Leisure Traveler Spending, 2008 - 2017

- Total leisure traveler spending (includes domestic & international, business & leisure, overnight & day-trip segments) grew 2.5% (or by \$0.9 billion) to \$36.3 billion in 2017 – a new record high (in dollars not adjusted for inflation).
- While both overnight and day-trip leisure segments registered increases in 2017, the strongest increase in both dollar and percentage terms was by overnight travelers.

Total Leisure Traveler Spending

(in billions of U.S. dollars)



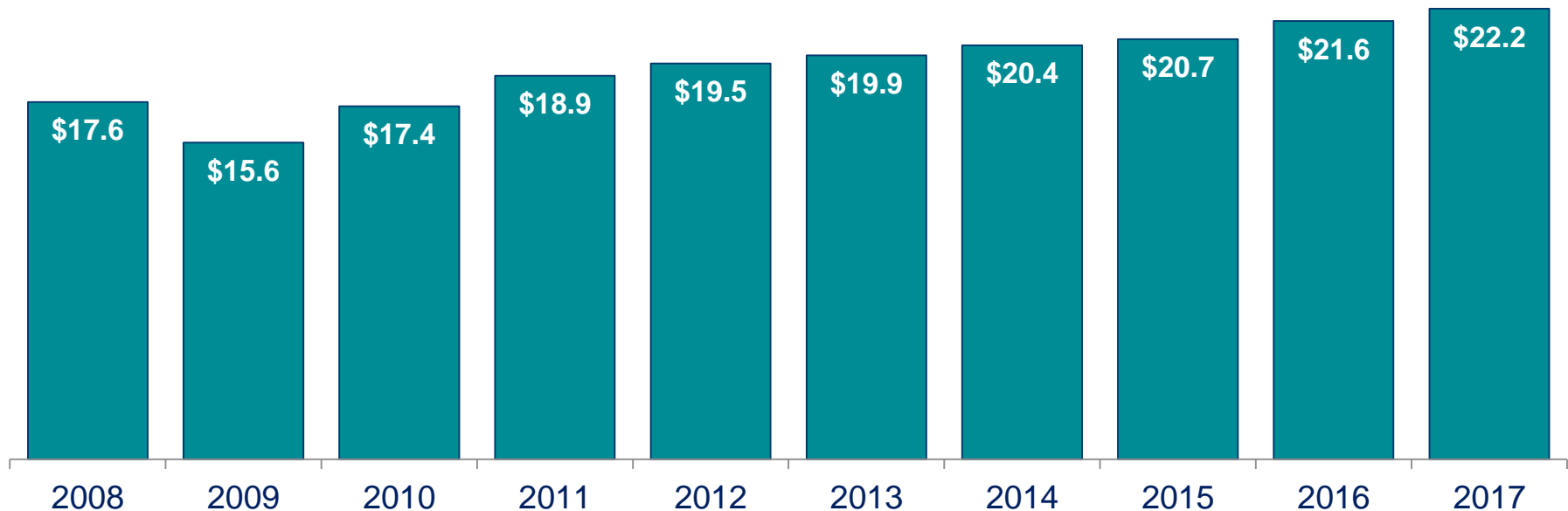
Source: *Tourism Economics*

Total Overnight Leisure Traveler Spend, 2008 - 2017

- Total spending by the state's overnight leisure travelers (includes domestic & international, business & leisure, overnight & day-trip segments) reached a new record high of \$22.2 billion in 2017.
- Spending by Pennsylvania's overnight leisure travelers rose 2.7% in 2017 – due to increases in both the number of travelers and their per trip spending and the continuing trend of steady year-over-year increases since 2010.

Total Overnight Leisure Traveler Spending

(in billions of U.S. dollars)



Source: Tourism Economics

The Domestic Travel Market in Detail

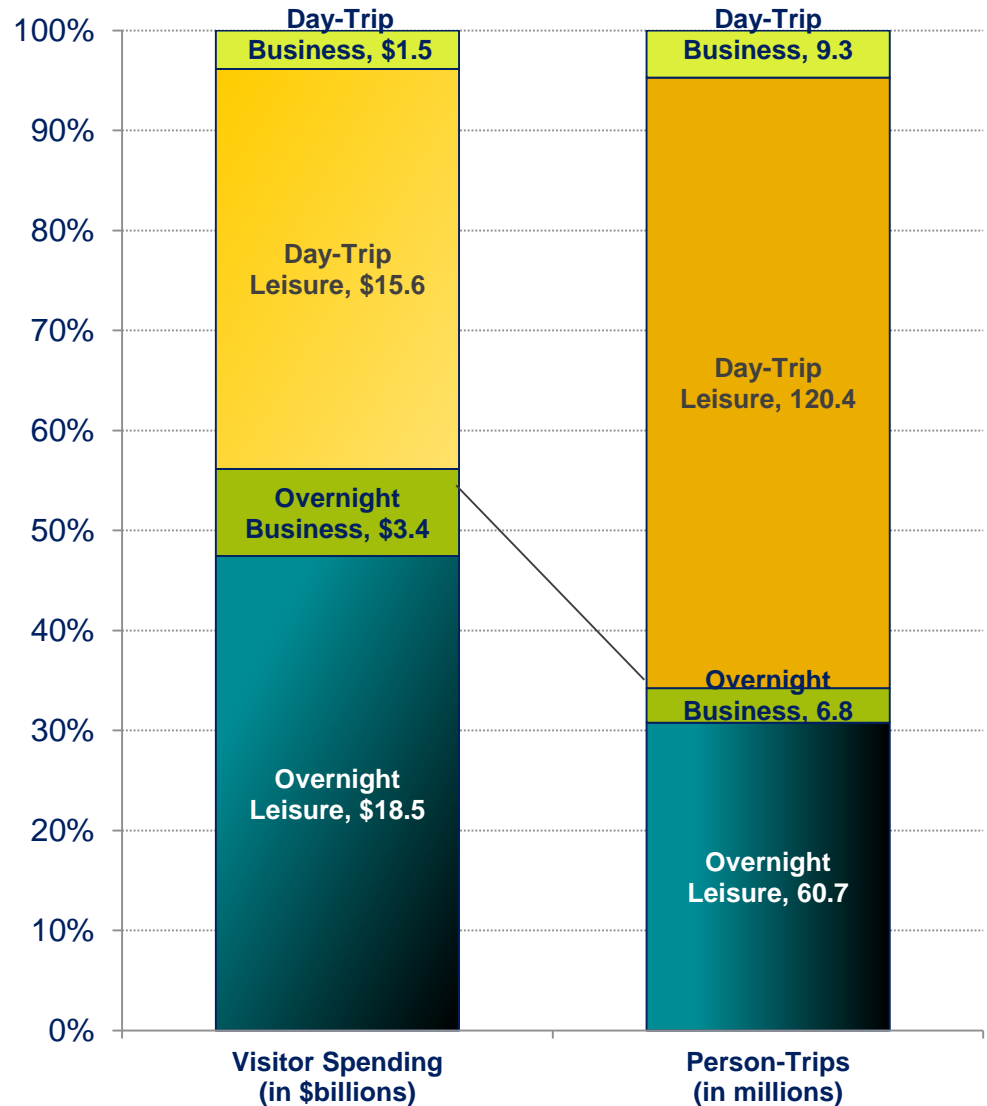
Domestic Visits and Traveler Spending

- Pennsylvania hosted an estimated 202.1 million U.S. (*i.e., domestic*) travelers in 2017 (*as measured in “person-trips”*) – a 2.7% increase.
- The increase in the number of U.S. travelers coupled with a 2.5% increase in their average per trip spending resulted in a 5.2% increase in total domestic traveler spending in Pennsylvania equal to an estimated \$41.1 billion in 2017.
- Slightly more than a third of travelers (69.6 million, up 4.1%) stayed overnight during their 2017 Pennsylvania trip, while an estimated 132.5 million day-trips were taken to and/or within Pennsylvania – a 1.9% increase from 2016.
- Two-thirds of the increase in spending was from the overnight segments, especially the business overnight segment.
- Average per person-trip spending in 2017 rose by 2.5% to \$203.

(It is important to note the figures in the following tables are based solely on self-reported consumer survey responses and exclude certain spending attributable to Pennsylvania and detailed in other sections of this report, but not captured in the consumer survey. As such, the totals presented in this section for domestic travelers will differ slightly from those presented in the other sections, but nevertheless provide valuable insight into the spending behaviors of the state’s U.S. visitors.)

2017 Domestic Traveler Spending vs. Person-Trips

- This chart compares the relative shares of traveler spending vs. trips for the four major trip types, i.e., overnight leisure, day-trip leisure, overnight business, and day-trip business. *Note: The chart excludes those whose trip was for combined business-leisure purposes since the survey does not separate out the amount of trip costs attributable to the business portion vs. the leisure portion.*
- PA's Overnight Leisure segment accounted for 30% of all person-trips in 2017 and a far higher 45% share of total domestic visitor spending, while Day-Trip Leisure accounted for 60% of domestic person-trips, but just 38% of total spending. In contrast, business travelers accounted for a far higher share of visitor spending than of trips.



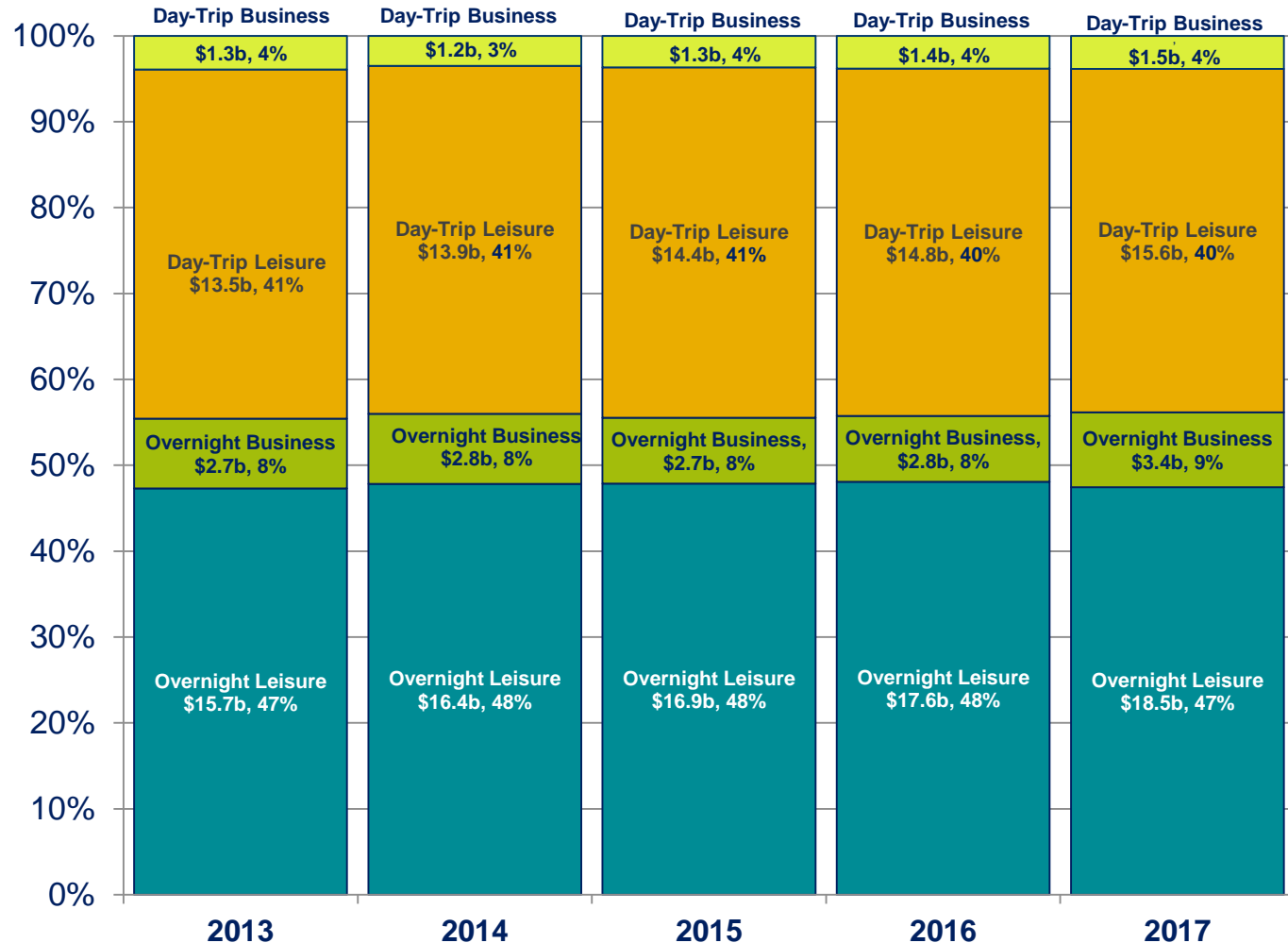
Source: Longwoods International

Domestic Spending Trends by Trip Type, 2013-2017

- Excluding the business-leisure category, leisure travelers accounted for close to 90% of Pennsylvania's domestic traveler spending in 2017.
- Increases in both per trip spending and the number of business travelers drove the increase in overnight business's share of traveler spending.
- The share of total traveler dollars spent by the various categories of traveler are extremely stable with just small shifts seen from year to year.

Domestic traveler spending by trip type

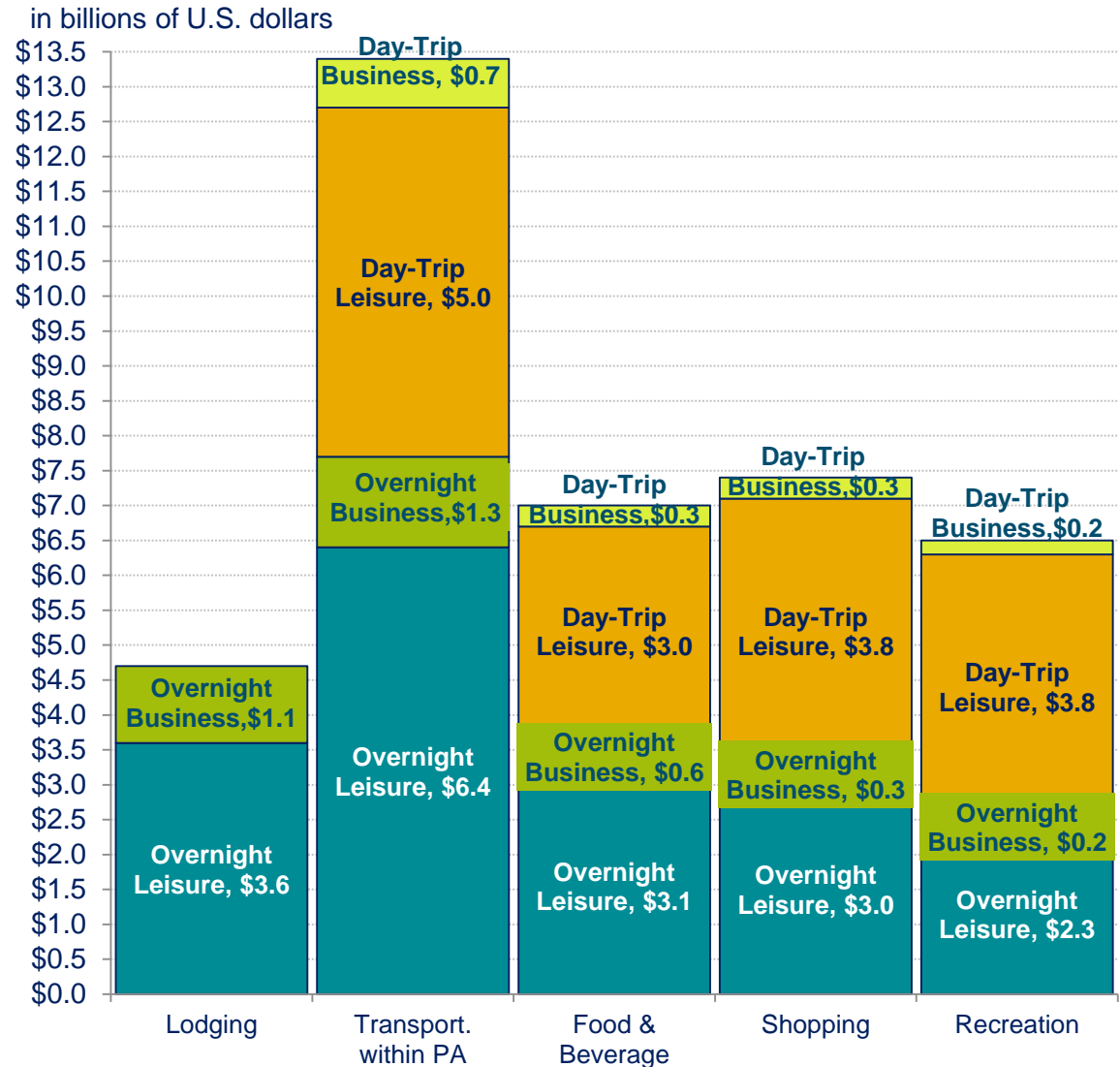
In billions of U.S. dollars and as Percent of total spending



Source: Longwoods International, DCED calculations

2017 Domestic Traveler Spending by Category and Trip Type

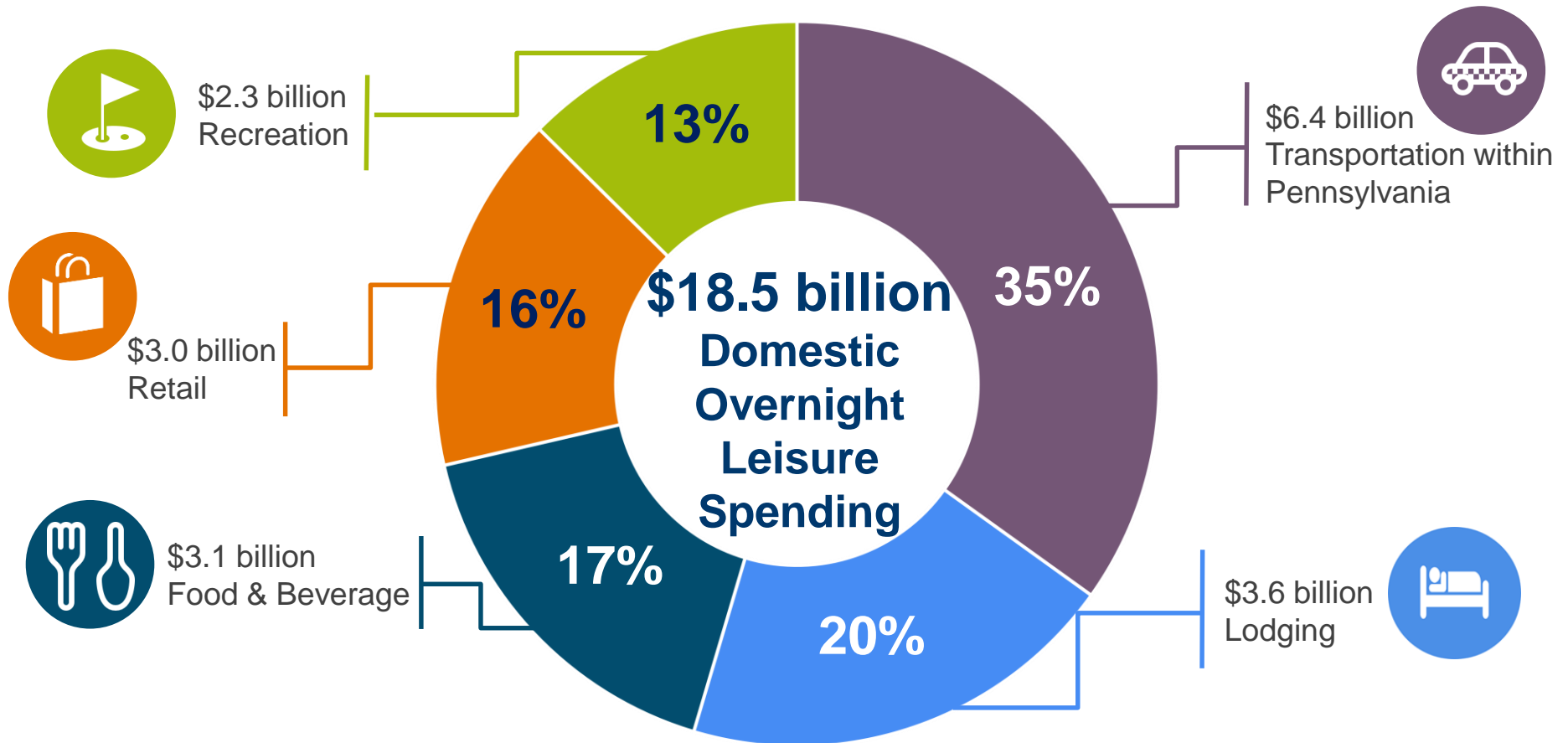
- Leisure travelers accounted for 84% of PA's total 2017 domestic traveler spending and for 77% of spending on lodging.
- Business overnight's 23% share of lodging spending was more than double the segment's 10% share of PA's total overnight person-trips, with lodging continuing to account for just under a third of the segment's total spend in 2017.
- Day-Trip leisure visitors continued to account for close to 60% of domestic visitor spending on recreation in PA in 2017.



Source: Longwoods International

2017 Domestic Overnight Leisure Traveler Spending by Category

PA's estimated 60.7 million overnight leisure travelers (as measured in person-trips) spent an average of \$304 per trip in 2017.

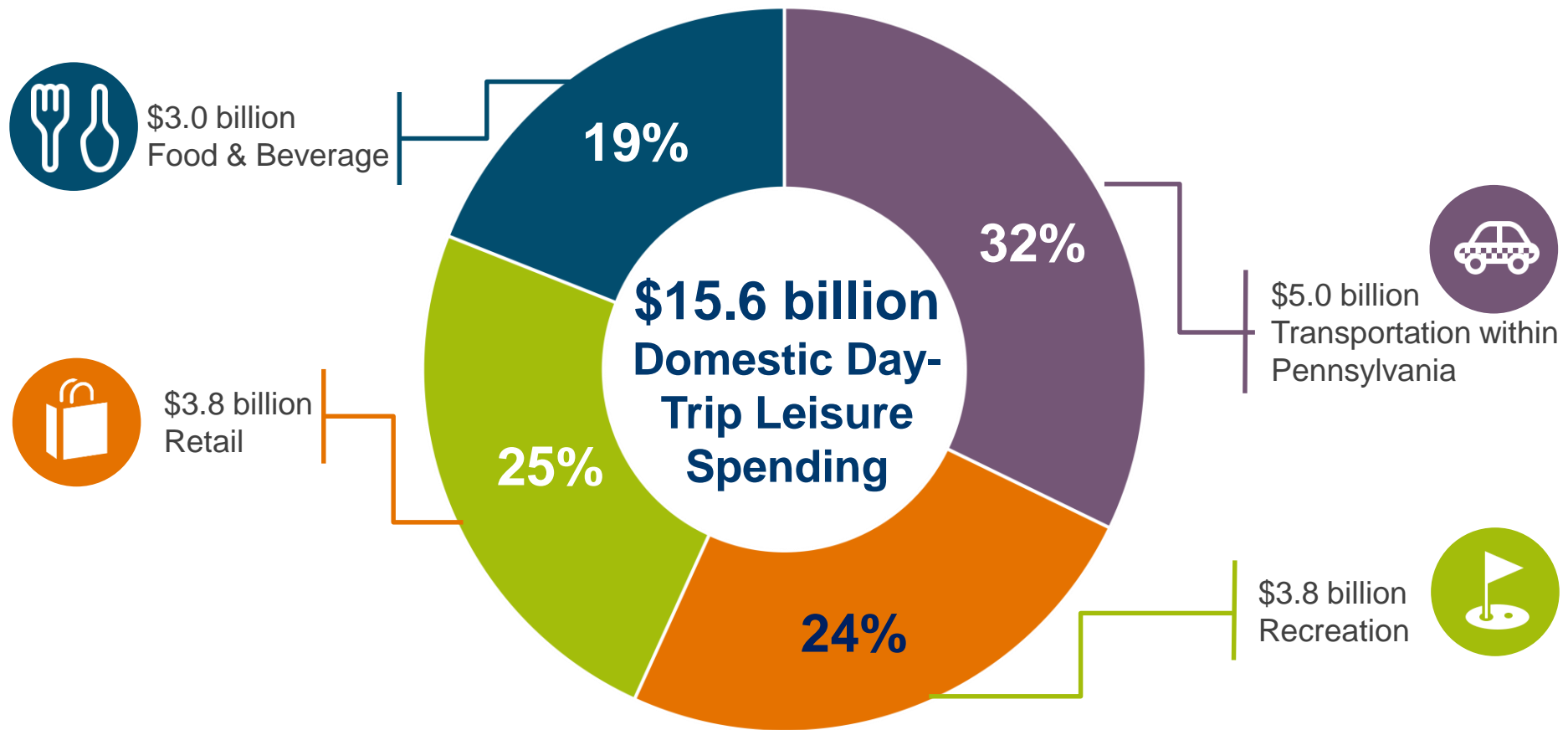


"Recreation" includes spending at attractions and on activities including both indoor (e.g., bowling) and outdoor (e.g., hiking).

Source: Longwoods International

2017 Domestic Day-Trip Leisure Traveler Spending by Category

PA's 120.4 million day-trip leisure travelers spent an average of \$129 per trip in 2017, spending almost an identical amount on recreation and retail purchases.

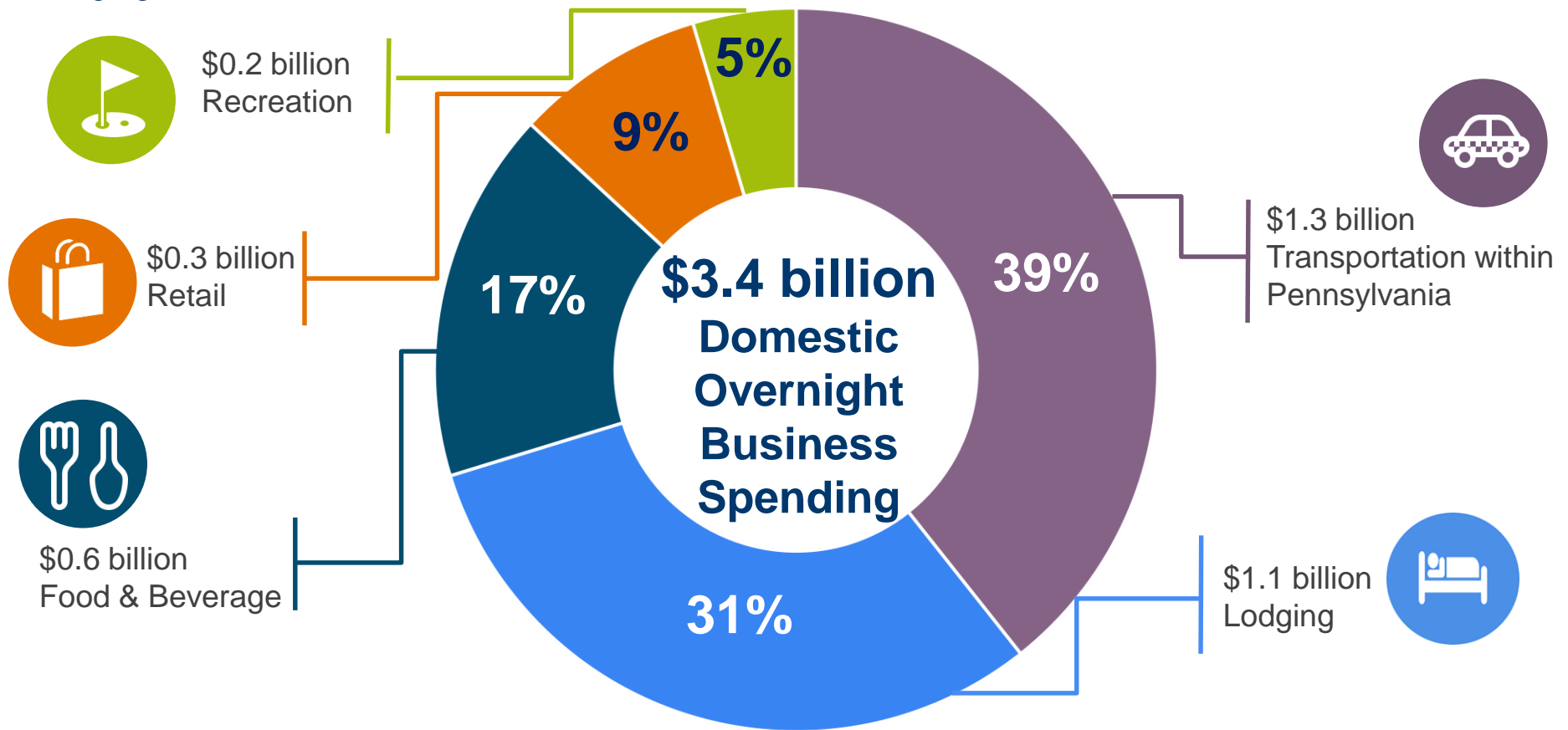


“Recreation” includes spending at attractions and on activities including both indoor (e.g., bowling) and outdoor (e.g., hiking).

Source: Longwoods International

2017 Domestic Business Overnight Traveler Spending by Category

PA's estimated 6.8 million business overnight travelers spent an average of \$506 per trip in 2017, up from \$480 in 2016 but still below the \$535 average of 2015.

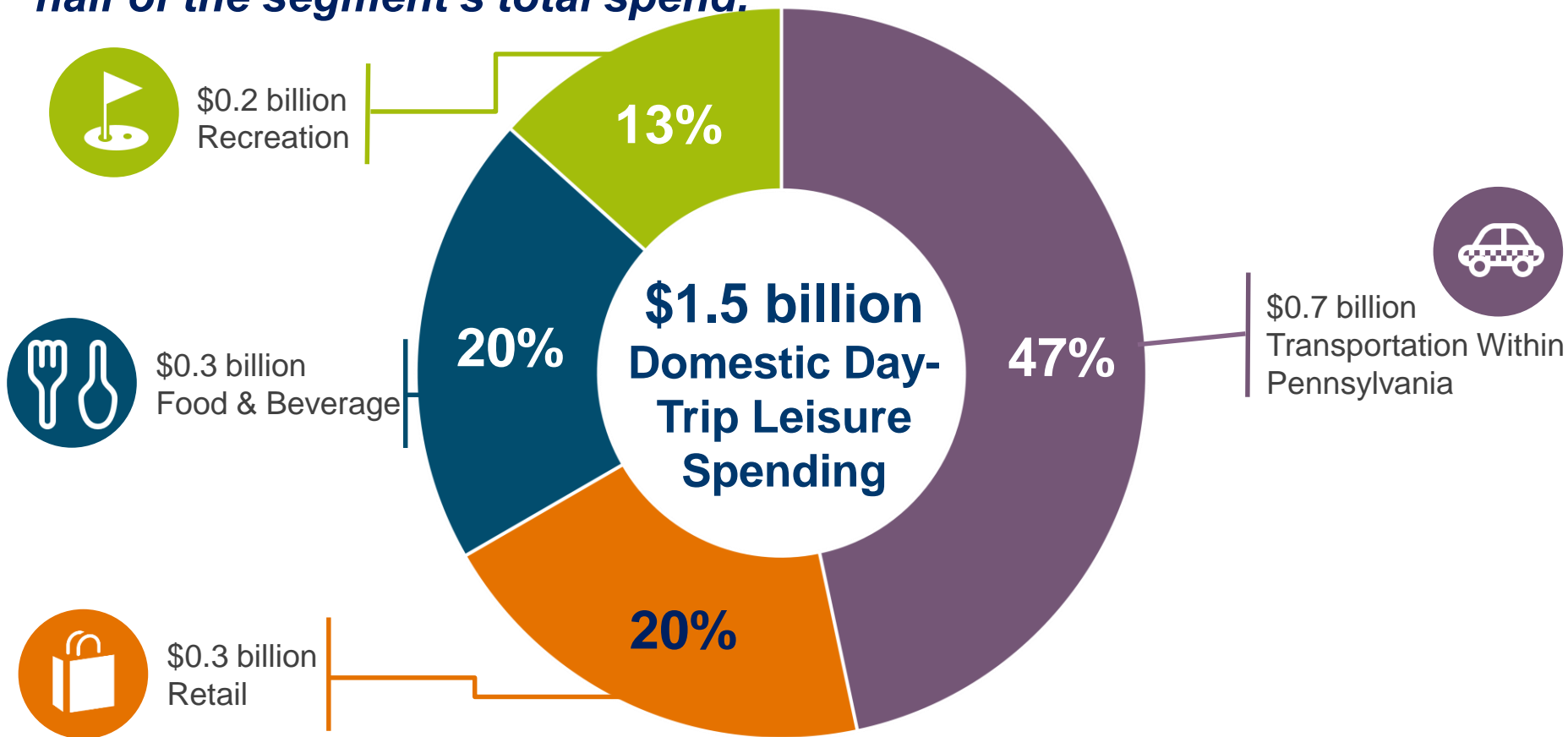


“Recreation” includes spending at attractions and on activities including both indoor (e.g., bowling) and outdoor (e.g., hiking).

Source: Longwoods International

2017 Domestic Day-Trip Business Traveler Spending by Category

PA's 9.3 million day-trip business travelers spent an average of \$161 per trip in 2017 with transportation continuing to account for roughly half of the segment's total spend.



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

Source: Longwoods International

State Tourism Industry Impacts

(Direct Impacts)



TOURISM
ECONOMICS

AN OXFORD ECONOMICS COMPANY

Travel and Tourism Industry Impact on PA GDP and Jobs, 2017

2017 PA Travel and Tourism Spending Impacts		
Industry	GDP (in billions)	Employment
Agriculture, Fishing, Mining	--	--
Construction and Utilities	--	--
Manufacturing	--	--
Wholesale Trade	--	--
Air Transportation	\$1.908	9,897
Non-Air Transportation	\$2.127	27,892
Retail Trade	\$1.571	35,215
Gasoline Stations	\$0.238	8,098
Communications	--	--
Fire, Insurance, and Real Estate (FIRE)	\$1.144	5,307
Business Services	\$0.095	1,193
Education and Health Care	--	--
Recreation and Entertainment	\$2.532	47,141
Lodging	\$3.836	59,680
Food & Beverage	\$4.037	123,639
Personal Services	\$0.397	7,494
Government	--	--
Total	\$17.885	325,554
Percent Change	5.3%	1.1%

- Travel and tourism industry impacts include only the direct value of the goods and services purchased by travelers and, as such, exclude capital investment and general government support of travel and tourism. This definition is consistent with the national economic accounts.
- PA's travel and tourism industry was responsible for close to \$18 billion of the state's gross domestic product (GDP) in 2017 – a 5.3% increase from 2016 and representing 2.4% of the state total.
- Spending by travelers within PA directly supported 325,554 PA jobs – a 1.1% increase from 2016 and continuing to represent 4.4% of the state's total employment.

Why Spending and GDP Differ

- Total traveler spending in Pennsylvania totaled \$43.3 billion in 2017, yet the industry's contribution to the state's Gross Domestic Product was equal to just \$17.9 billion. Why are the figures so different?
- GDP (gross domestic product) is less than traveler spending, or “sales,” because GDP measures only the locally produced value of goods and services consumed by travelers.
 - This includes the local labor, capital depreciation, and the profits of travel-related companies that are based in Pennsylvania.
 - The costs of imported goods (e.g., gasoline, food, retail goods, etc.) that come from out-of-state are excluded from the GDP calculation.
 - In addition, business profits from out-of-state companies are also excluded. For example, Wal-Mart profits leave the state and would not be included in PA's GDP.

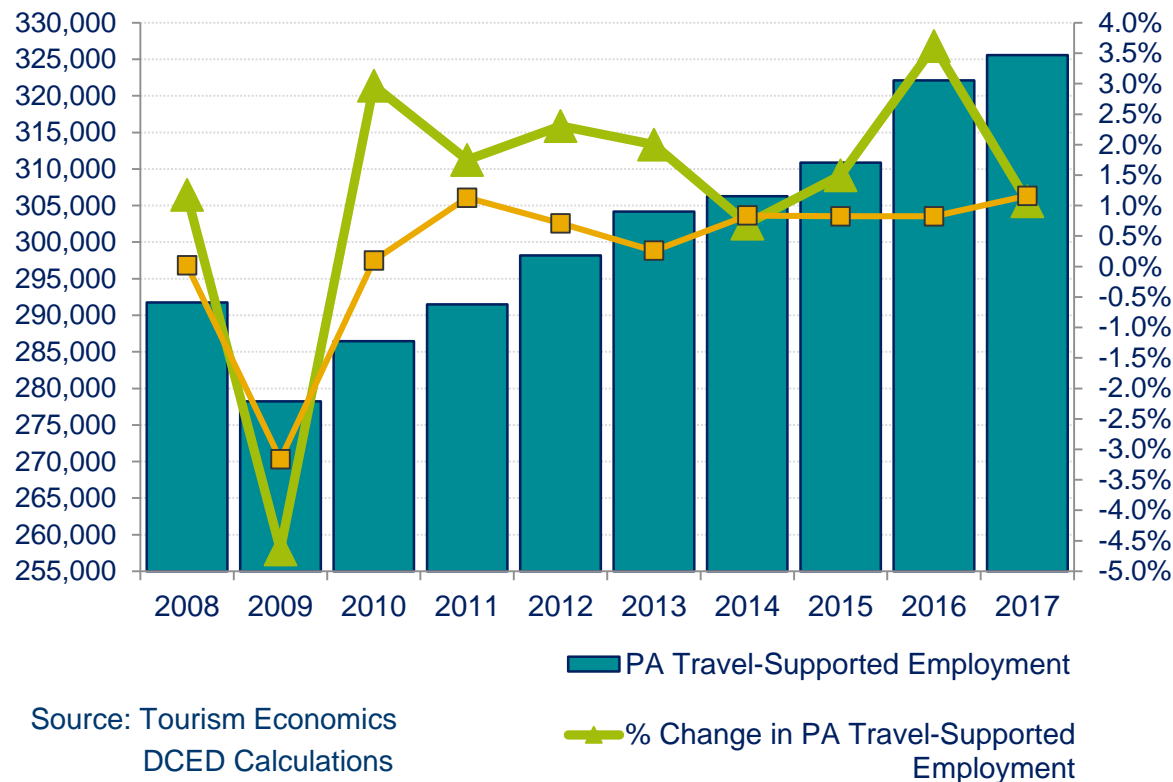
Because of these reasons, traveler spending (i.e., “sales” made to travelers) will always be substantially higher than the industry's contribution to the state's GDP.

PA's Travel-Related Employment, 2008-2017

PA Employment Supported By Travel and Tourism

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Employment	291,774	278,223	286,474	291,479	298,193	304,155	306,290	310,870	322,108	325,554
% Change	1.2%	-4.6%	3.0%	1.7%	2.3%	2.0%	0.7%	1.5%	3.6%	1.1%

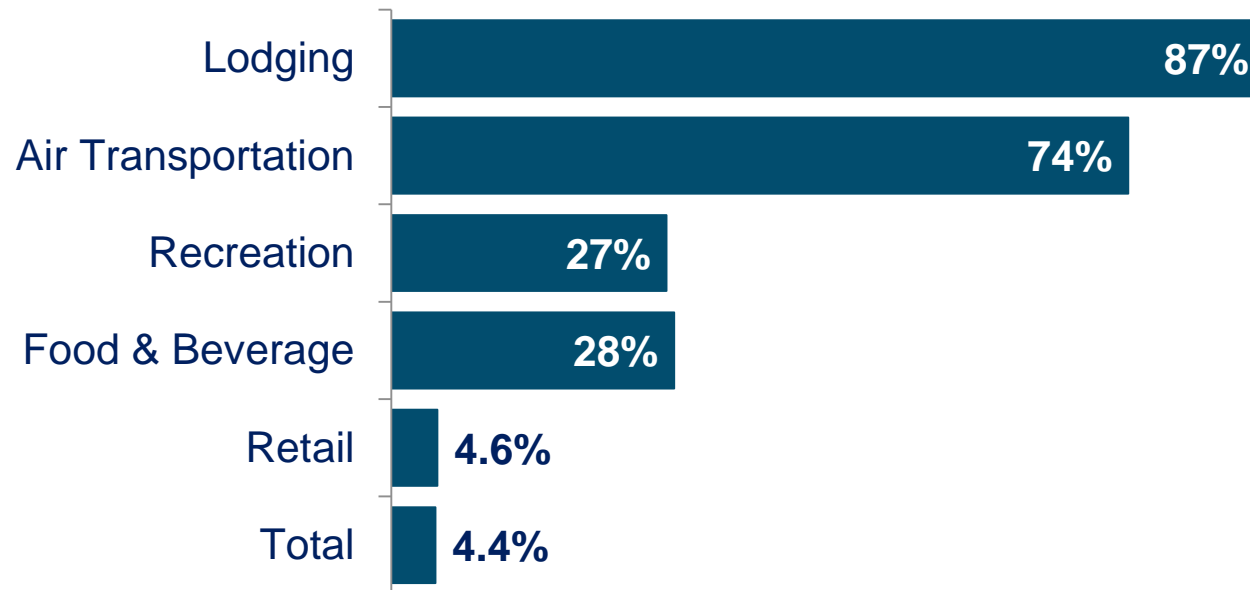
- The number of PA jobs directly supported by travel and tourism reached a new record high of 325,554 in 2017.
- After surpassing the growth in PA's total employment number over the past several years, the 1.1% growth in the state's travel-supported employment number was just slightly below the 1.2% increase in PA's total employment count.



PA Travel-Related Employment Intensity by Industry, 2017

- Pennsylvania's travel and tourism industry continued to represent a significant portion of employment in the state's lodging, air transportation, food & beverage, and recreation sectors, and an estimated 4.4% of the state total in 2017.
- The proportion of jobs for the various industries derived from travel & tourism in 2017 was little changed from the previous year.

Travel and Tourism-Related Employment Intensity by Industry, 2017



Source: Tourism Economics, U.S. Bureau of Economic Analysis

Ranking PA's Travel-Generated Employment, 2017

Travel and tourism dropped to 11th in a ranking of Pennsylvania's largest industries by employment in 2017, surpassed by the transportation and warehousing industry. *(Note: Travel and tourism does not have an official NAICS "industry code," but is responsible for a portion of jobs for industries with specified codes (e.g., accommodation and food services, retail trade, transportation, etc.).)*

Employment Ranking – Private Sector Commonwealth of Pennsylvania, 2017

Ranking	Industry	Employment
1	Health care and social assistance	1,102,335
2	Retail Trade	765,259
3	Manufacturing	596,360
4	Professional, scientific, and technical services	520,193
5	Accommodation and food services	506,732
6	Other services, except public administration	424,977
7	Finance and insurance	414,519
8	Administrative and waste management services	395,780
9	Construction	394,210
10	Transportation and warehousing	340,462
11	Real estate and rental and leasing	308,227
12	Educational services	304,510
13	Wholesale trade	238,702
14	Arts, entertainment, and recreation	171,642
15	Management of companies and enterprises	148,149
16	Information	101,126

**PA Jobs Directly
Supported by Travel
325,554**

Source: U.S. Bureau of Economic Analysis, "SAEMP25N Total Full-Time and Part-Time Employment by NAICS Industry" ; Tourism Economics

Pennsylvania's Total Travel & Tourism Economy

Tourism Satellite Account Measures

Translating Sales (*Visitor Spending*) into 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



Spending on Travel & Tourism by Category, 2013-2017

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

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

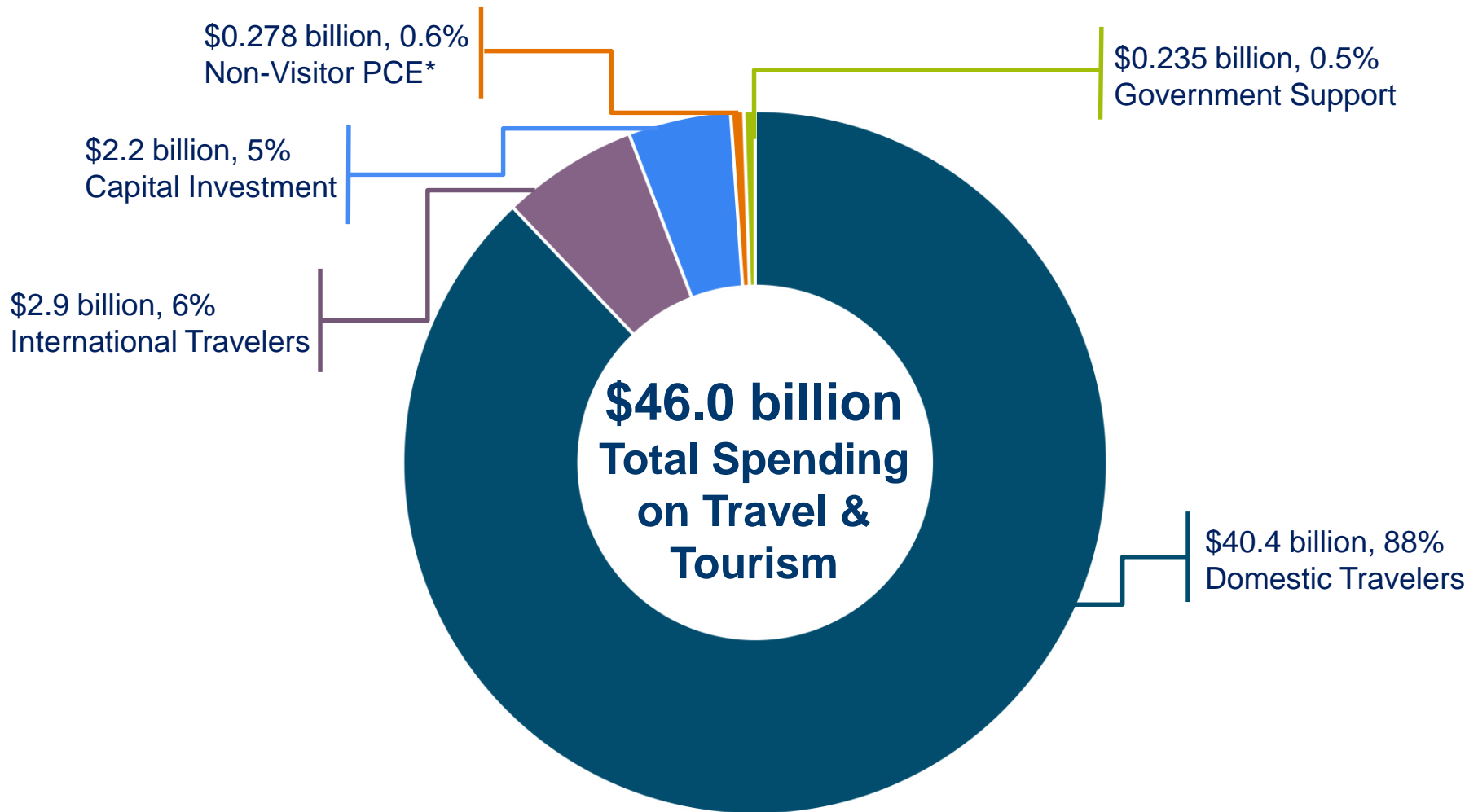
Calendar Year	Domestic Visitor Spending	International Visitor Spending	Non-Visitor PCE*	Government Support ⁺	Capital Investment [#]	Total
2017	\$40.446	\$2.880	\$0.278	\$0.235	\$2.168	\$46.006
2016	\$38.783	\$2.798	\$0.258	\$0.215	\$1.589	\$43.642
2015	\$38.134	\$2.720	\$0.207	\$0.195	\$1.941	\$43.197
2014	\$37.031	\$2.657	\$0.237	\$0.180	\$1.923	\$42.027
2013	\$36.595	\$2.629	\$0.238	\$0.173	\$1.541	\$41.176
% Change, 2016-2017	4.3%	2.9%	7.9%	9.4%	36.4%	5.4%
CAGR, 2013 - 2017	2.0%	1.8%	3.1%	6.3%	7.1%	2.2%

*Non-visitor private consumption expenditures (PCE) represent travel-related consumer durable goods purchases, such as an RV, boat, or furniture for a vacation home.

⁺Government support for travel and tourism includes the budget for the state tourism office and local tourism and local tourism promotion agencies derived from the local room tax and other government support, state-supported attractions (e.g., the State Museum), security, and other items in broad support of the industry.

[#]Capital investment includes construction travel-related infrastructure and equipment.

2017 Total Spending on Travel and Tourism by Category



*Non-visitor private consumption expenditures (PCE) represent travel-related consumer durable goods purchases, such as an RV, boat, or furniture for a vacation home.

Source: Tourism Economics

Travel & Tourism Industry Capital Investment in PA, 2008-2017

Travel- and Tourism-Related Capital Investment (in millions of U.S. dollars)

Capital Investments	2008		2013	2014	2015	2016	2017	2016-17 % Change	2013-16 CAGR
Construction	\$1,282		\$ 613.4	\$ 983.3	\$ 975.3	\$ 606.2	\$1,144.7	88.8%	13.3%
Machinery & Equipment	808		927.6	\$ 939.5	965.3	\$ 982.6	1,023.1	4.1%	2.0%
Total	\$2,089		\$1,540.9	\$1,922.8	\$1,940.6	\$1,588.8	\$2,167.8	36.4%	7.1%
% Change			-2.1%	24.8%	0.9%	-18.1%	36.4%		

- The travel and tourism industry invested close to \$2.2 billion in capital-intensive construction and machinery and equipment projects in Pennsylvania in 2017 – a 36% increase and the strongest level of investment since at least 2008.
- Investments in both machinery and equipment and construction projects in 2017 were at their highest levels since at least 2008. Over the past several years, investments in machinery and equipment have been relatively constant with annual increases ranging between 1% and 4%. In contrast, investments in construction projects have varied greatly – from a high of 89% in 2017 to a 38% drop between 2015 and 2016.

2017 Sales to Travelers in PA & Tourism Satellite Account

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

2017 PA Traveler Spending vs. Total Impact By Expenditure Category (in billions of U.S. dollars)		
Industry	Total Traveler Spending	Total Economy Impact
Non-Air Transportation	\$10.597	\$10.597
Food and Beverage	9.021	9.021
Recreation	7.542	7.542
Shopping	6.745	6.745
Lodging	5.953	5.953
Air Transportation	3.467	3.467
Capital Investment	0	2.168
Non-Visitor Personal Consumption Exp.	0	0.278
Government	0	0.235
Total	\$43.326	\$46.006

State Travel and Tourism Economy Impacts

(Direct, Indirect, and Induced Impacts)

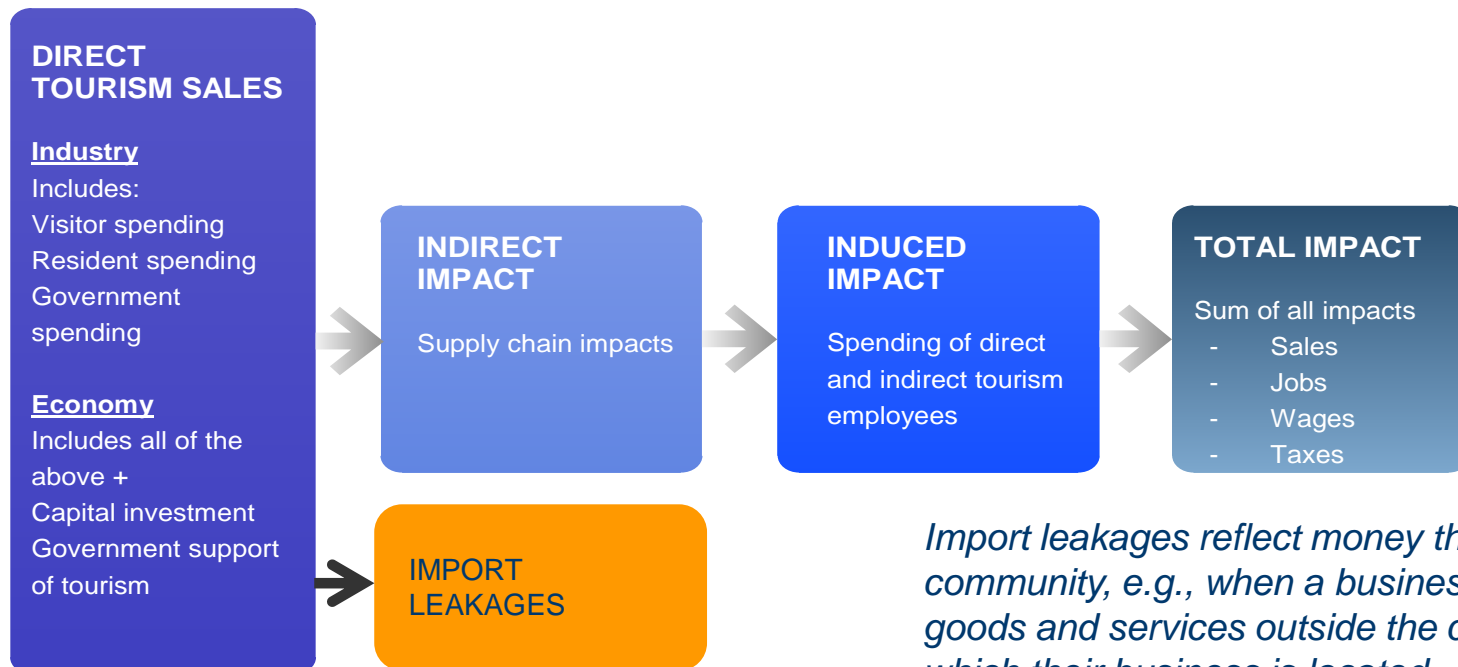


TOURISM
ECONOMICS

AN OXFORD ECONOMICS COMPANY

Translating Sales into Impact

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



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

PA Travel Economy – GDP Impact by Industry, 2017

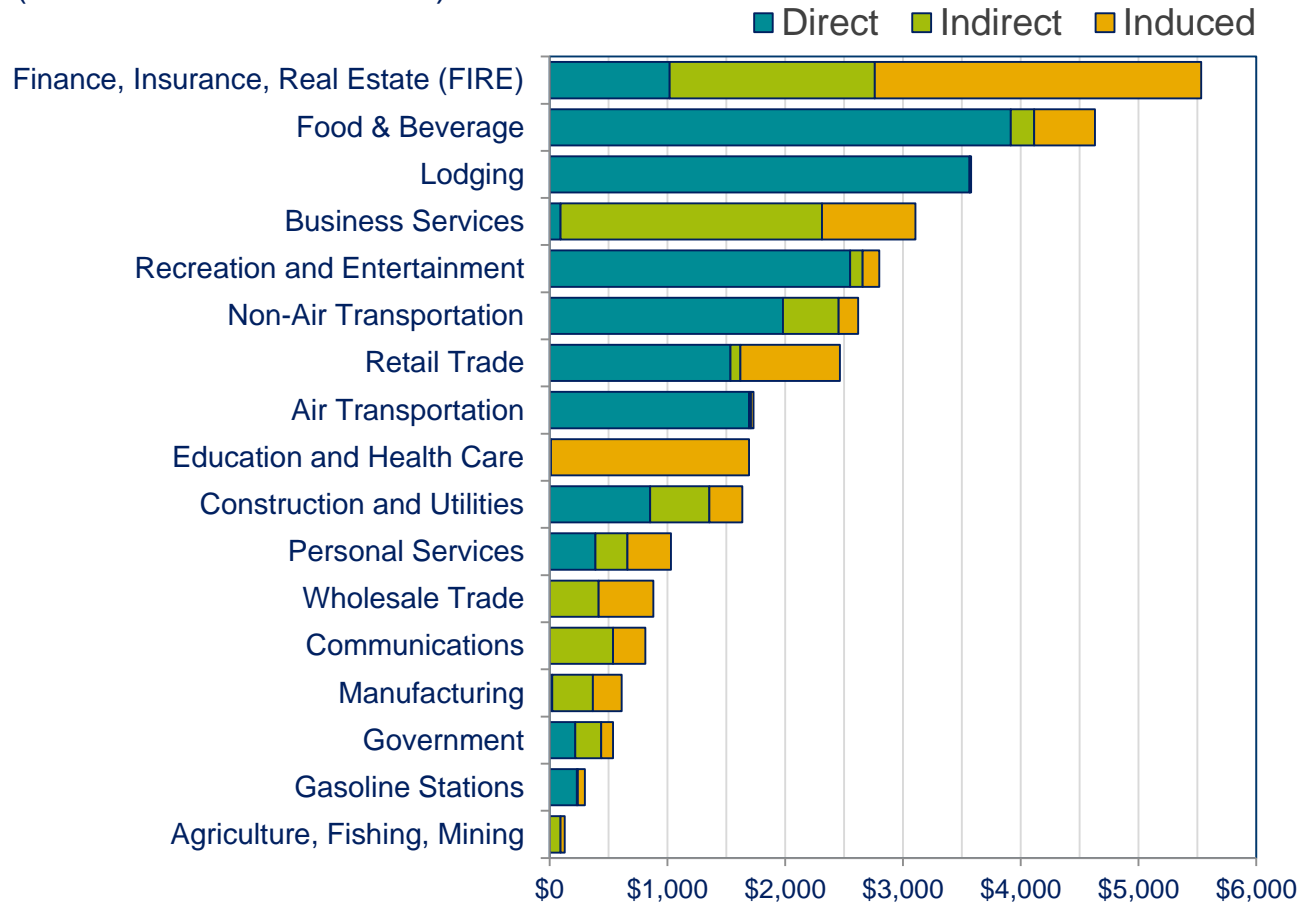
- The following table shows the direct, indirect, and induced impact of travel and tourism on Pennsylvania's GDP for various industry sectors.
- PA's travel and tourism industry directly generated more than \$19 billion in Gross Domestic Product (GDP) for the state in 2017 and close to \$36 billion under the broadest Economy measure – a figure equivalent to 4.8% of Pennsylvania's total GDP.

2017 PA Travel Economy GDP (Value Added) (in millions of U.S. dollars)				
Industry	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	\$ --	\$107.1	\$40.3	\$147.4
Construction and Utilities	910.5	514.8	284.9	1,710.2
Manufacturing	23.9	357.1	253.6	634.6
Wholesale Trade	--	436.5	486.3	922.8
Air Transportation	1,907.8	17.3	26.3	1,951.4
Non-Air Transportation	2,127.3	488.8	171.5	2,787.7
Retail Trade	1,571.0	86.9	864.4	2,522.3
Gasoline Stations	237.9	7.3	60.8	306.1
Communications	--	555.1	282.9	838.0
Finance, Insurance, Real Estate (FIRE)	1,144.2	1,882.8	2,998.5	6,025.4
Business Services	95.4	2,304.1	821.4	3,220.8
Education and Health Care	--	13.0	1,749.8	1,762.8
Recreation and Entertainment	2,531.6	105.6	138.1	2,775.3
Lodging	3,836.4	7.3	8.4	3,852.2
Food & Beverage	4,037.2	205.4	533.9	4,776.6
Personal Services	396.5	272.6	376.0	1,045.1
Government	222.5	225.6	100.9	548.9
Total	\$19,042.1	\$7,587.3	\$9,198.0	35,827.4
Percent Change from 2016	5.4%	4.6%	4.9%	5.1%

PA Travel Economy – GDP Impact by Industry, 2017

- Including the indirect and induced supply chain and income effects, travel and tourism benefits a broad spectrum of industries.
- The recreation & entertainment sector continued to account for nearly \$2.8 billion of PA's GDP in 2017, with 91% derived directly from visitor spending – behind only lodging and air transportation in terms of the percentage of direct impact relative to the total (direct, indirect, and induced) Economy impacts.

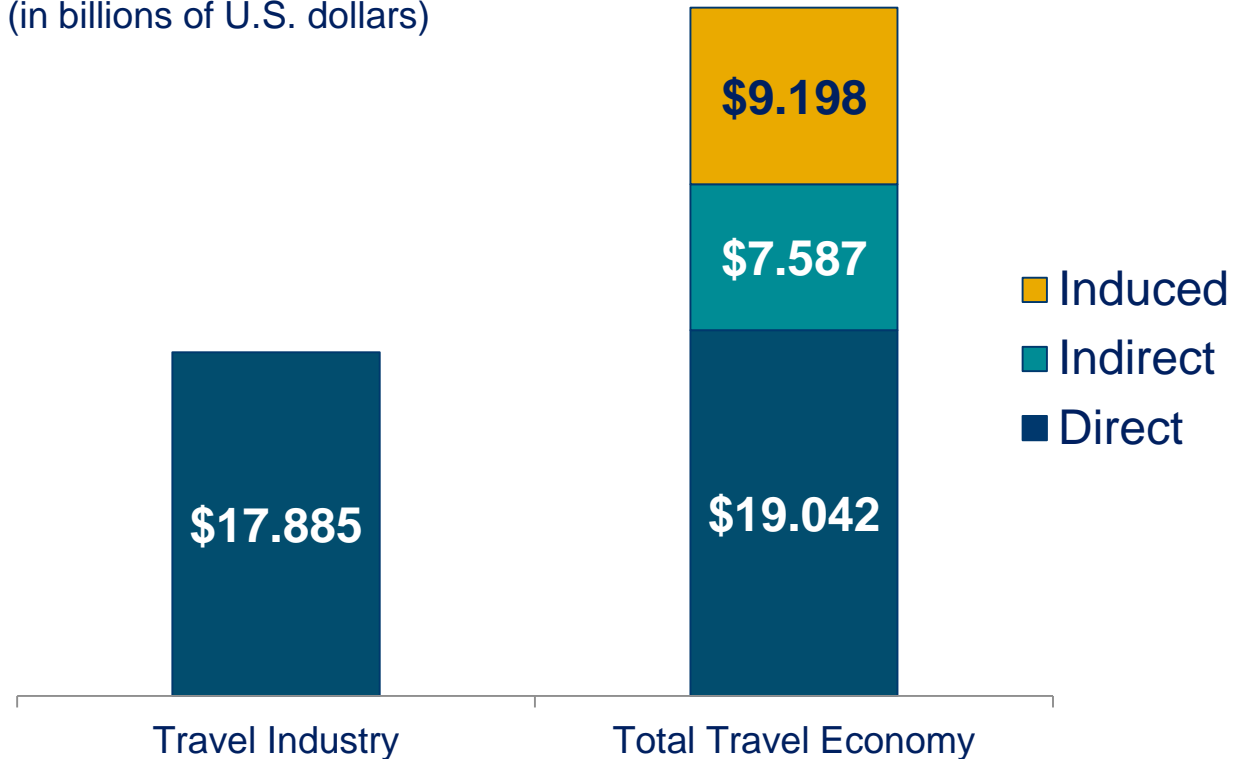
Impact on PA GDP by Travel Economy, 2017
(in millions of U.S. dollars)



PA's Travel and Tourism Industry: Industry Impact vs. Economy Impact on GDP, 2017

- Pennsylvania's travel and tourism industry directly contributed nearly \$18 billion to the state's gross domestic product (GDP) in 2017 (i.e., industry impact).
- The state's total travel and tourism economy (including direct, indirect, and induced impacts) generated close to \$36 billion to PA's GDP in 2017 – a figure equivalent to 4.8% of the state total or twice the direct industry share.

Impact of Travel & Tourism on PA GDP, 2017
(in billions of U.S. dollars)



PA Travel Economy – Employment Impact by Industry, 2017

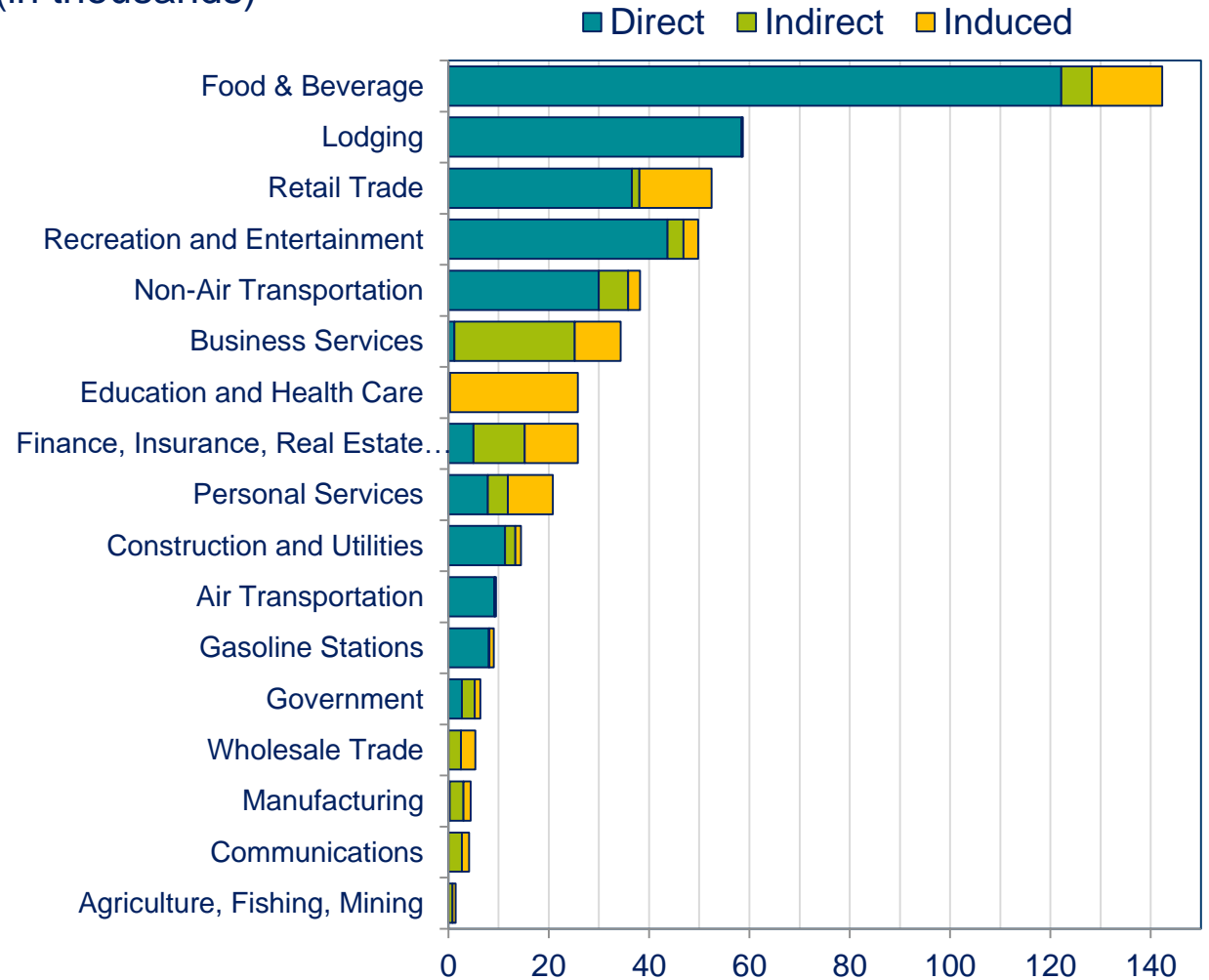
- Pennsylvania’s travel and tourism industry supported an estimated 509,073 jobs when all impacts – direct, indirect, and induced – are included, or 6.6% of PA’s total job count in 2017.
- The total presented below reflects the broadest measurement of employment, i.e., includes businesses directly serving the traveling public and their support industries, as well as jobs supported by government spending, capital investment, and private consumption expenditures.

2017 PA Travel-Related Employment (<i>Value Added</i>)				
Industry	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	--	888	656	1,543
Construction and Utilities	11,915	2,208	1,189	15,312
Manufacturing	273	2,761	1,445	4,479
Wholesale Trade	--	2,366	2,623	4,989
Air Transportation	9,897	104	162	10,163
Non-Air Transportation	27,892	6,649	2,674	37,215
Retail Trade	35,215	1,493	14,090	50,798
Gasoline Stations	8,098	128	883	9,110
Communications	--	2,724	1,379	4,103
Finance, Insurance, Real Estate (FIRE)	5,307	10,571	10,952	26,829
Business Services	1,193	24,171	9,200	34,564
Education and Health Care	--	319	25,925	26,244
Recreation and Entertainment	47,141	3,401	3,012	53,553
Lodging	59,680	110	129	59,919
Food & Beverage	123,639	6,131	14,008	143,777
Personal Services	7,494	3,914	8,670	20,077
Government	2,677	2,592	1,126	6,396
Total	340,419	70,529	98,124	509,073
Percent Change from 2016	1.2%	2.1%	0.7%	1.2%

PA Travel Economy – Employment Impact by Industry, 2017

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

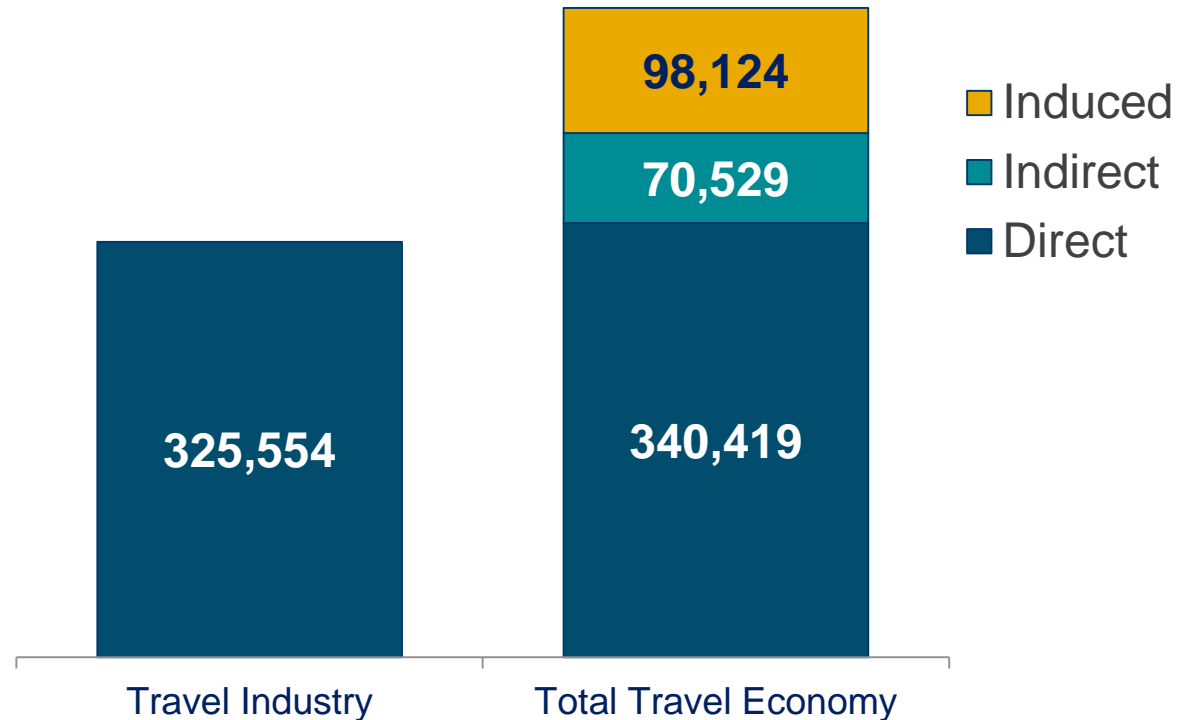
Impact on PA Employment by Travel Economy, 2017
(in thousands)



PA's Travel and Tourism Industry: Industry Impact vs. Economy Impact on Jobs, 2017

- Traveler spending directly supported 325,554 jobs in Pennsylvania in 2017 (*i.e., the travel and tourism industry impact*).
- The travel and tourism economy (*i.e., includes direct, indirect, and induced impacts*) supported 509,073 jobs in Pennsylvania in 2017 or 6.6% of all jobs in the state.

Impact of Travel & Tourism on PA Employment, 2017



PA Travel Economy – Labor Income Impact by Industry, 2017

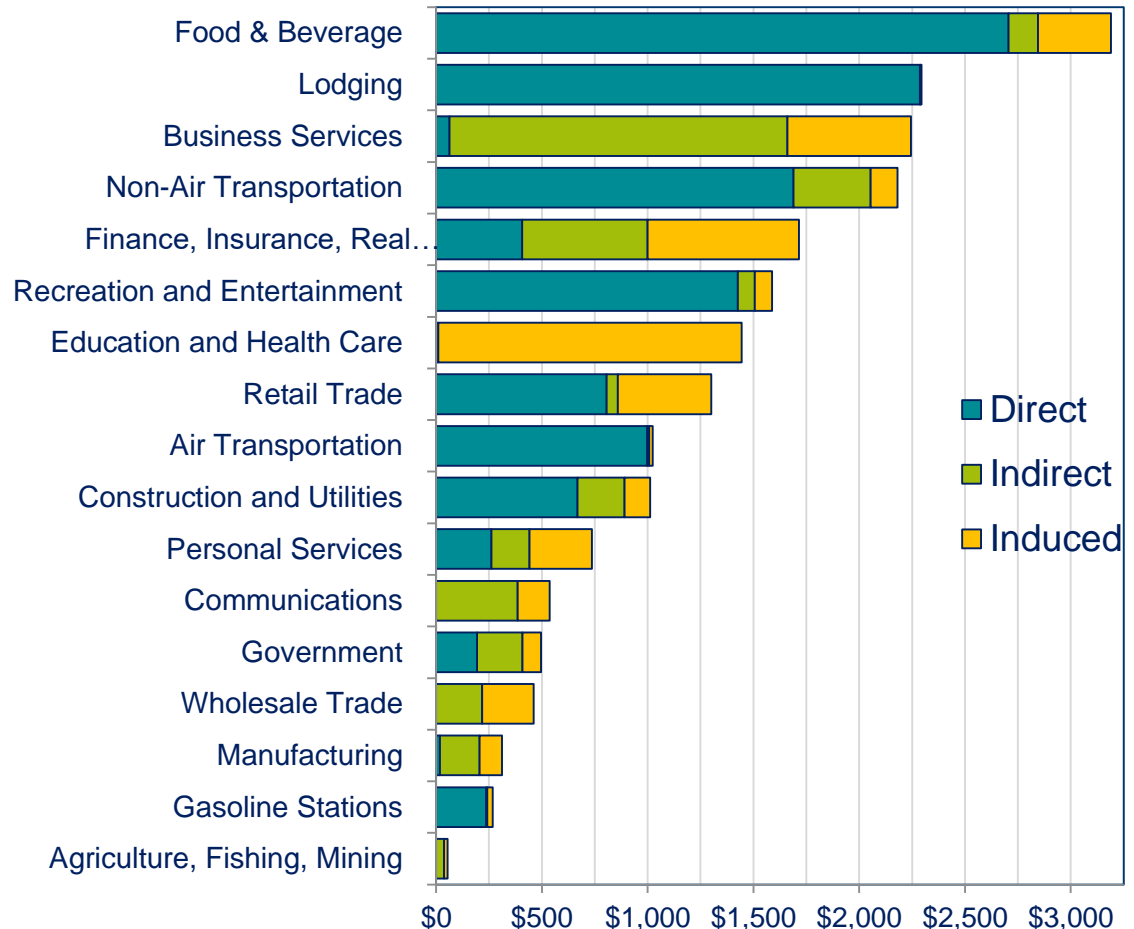
Traveler spending generated more than \$22 billion in income for persons employed by Pennsylvania businesses that were supported in some way – either directly or indirectly – by the state’s travel and tourism industry in 2017.

2017 PA Travel-Related Labor Income (Compensation) <i>(in millions of U.S. dollars)</i>				
Industry	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	\$ --	\$39.7	\$16.5	\$56.2
Construction and Utilities	720.2	231.6	126.1	1,077.9
Manufacturing	18.0	197.3	110.9	326.2
Wholesale Trade	--	221.3	245.8	467.1
Air Transportation	1,147.3	11.5	18.2	1,177.0
Non-Air Transportation	1,790.0	396.4	137.3	2,323.7
Retail Trade	822.4	51.6	450.4	1,324.4
Gasoline Stations	233.3	4.0	25.6	262.8
Communications	--	427.7	172.1	599.9
Finance, Insurance, Real Estate (FIRE)	428.0	632.2	765.1	1,825.3
Business Services	67.8	1,707.9	629.7	2,405.5
Education and Health Care	--	11.0	1,498.7	1,509.7
Recreation and Entertainment	1,637.3	90.4	95.4	1,823.2
Lodging	2,322.8	3.8	4.5	2,331.1
Food & Beverage	2,804.4	142.0	349.0	3,295.3
Personal Services	267.6	181.4	299.5	748.5
Government	196.4	217.5	89.1	503.0
Total	\$12,455.6	\$4,567.4	\$5,033.9	\$22,056.9
Percent Change from 2015	5.9%	6.2%	5.0%	5.8%

PA Travel Economy – Labor Income Impact by Industry, 2017

- Traveler spending generated more than \$22 billion for the state’s business owners and their employees, with the direct impact led by traveler intensive industries, i.e., restaurants, lodging, and transportation.
- Business owners and employees of business services and finance, insurance & real estate companies continued to derive substantial benefit from the state’s travel and tourism industry, primarily as service suppliers to the industry in 2017.

Impact on PA Labor Income by Travel Economy, 2017
(in millions)



PA Travel Economy – Tax Generation, 2011-2017

- Travelers were directly and indirectly responsible for more than \$4.5 billion in Pennsylvania state and local tax revenues and nearly \$4.8 billion in federal taxes in 2017.
- Pennsylvania’s state and local governments would have to tax each PA household an additional \$900 per year to replace the taxes generated by travel and tourism.

Traveler-Generated Taxes, 2011 - 2017

(in millions of U.S. dollars)

Tax Type	2011	2012	2013	2014	2015	2016	2017	% Change
Federal Taxes	\$3,856.4	\$4,007.8	\$4,163.9	\$4,312.3	\$4,499.5	\$4,637.3	\$4,762.6	2.7%
Corporate	387.1	405.3	411.8	418.2	431.4	484.1	484.1	0.0%
Indirect Business	368.3	385.7	391.8	397.9	410.5	409.6	409.6	0.0%
Personal Income	1,137.0	1,179.5	1,232.1	1,281.92	1,341.1	1,407.5	1,453.5	3.3%
Social Insurance	1,964.0	2,037.3	2,128.2	2,214.3	2,316.5	2,336.0	2,415.4	3.4%
State and Local Taxes	\$3,799.2	\$4,023.6	\$4,132.6	\$4,223.8	\$4,366.5	\$4,409.7	\$4,518.7	2.5%
Corporate	250.5	265.9	270.2	274.4	283.0	259.4	252.1	-2.8%
Personal Income	357.0	370.3	386.9	402.5	421.1	435.8	455.7	4.6%
Sales	1,441.5	1,507.6	1,533.6	1,553.4	1,595.9	1,611.3	1,656.7	2.8%
Hotel Occupancy	133.1	143.6	152.9	160.0	170.4	183.4	200.2	9.2%
Property	1,066.9	1,155.6	1,195.5	1,227.1	1,259.5	1,317.7	1,349.0	2.4%
Excise and Fees	519.1	548.3	559.9	571.4	599.9	567.6	568.9	0.2%
PA Unemployment	31.1	32.2	33.7	35.0	36.6	34.5	35.9	4.1%
TOTAL	\$7,655.7	\$8,031.4	\$8,296.5	\$8,536.1	\$8,866.1	\$9,047.0	\$9,281.3	2.6%

Pennsylvania's Tourism Regions

2017 Traveler Spending and Economic Impact By Region and County



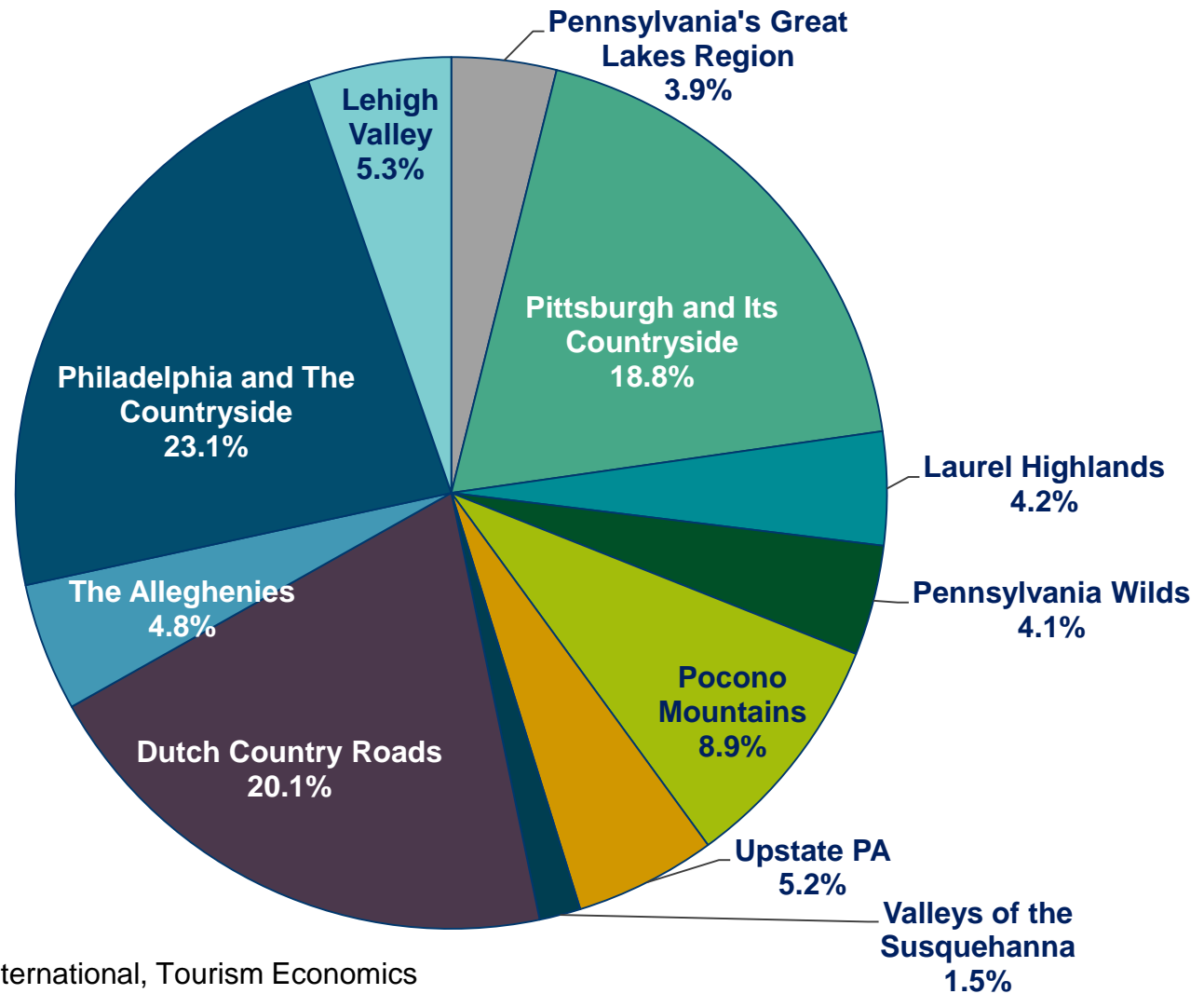
**TOURISM
ECONOMICS**

AN OXFORD ECONOMICS COMPANY



Traveler Spending and Economic Impact In Pennsylvania's Tourism Regions

Share of Total Traveler Spending by PA Region, 2017



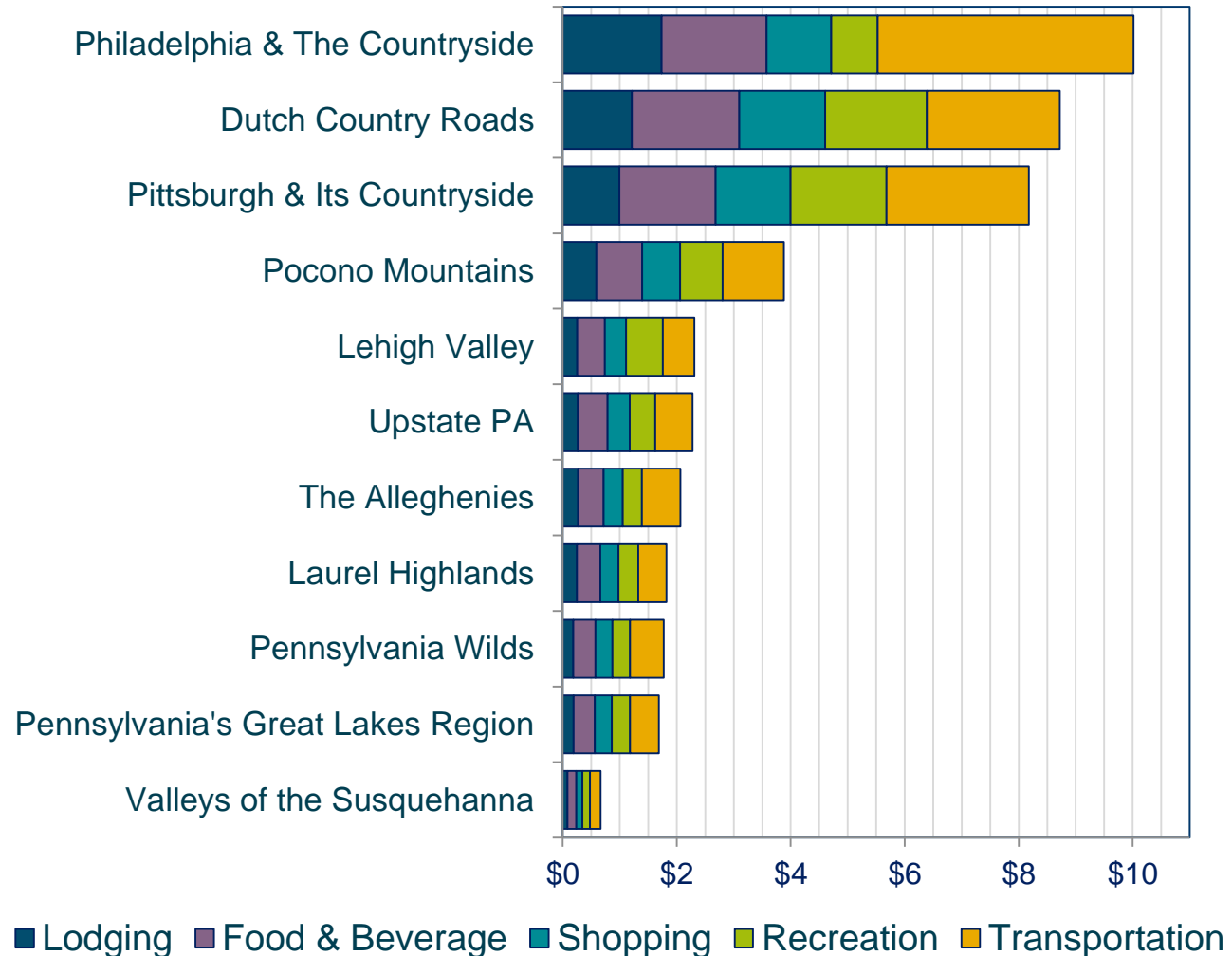
Source: Longwoods International, Tourism Economics

Traveler Spending in PA Regions by Category, 2017

- 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.
- Travelers continued to devote an increased share of their travel budgets to recreation in 2017. As in the previous year, those visiting the Lehigh Valley, Valleys of the Susquehanna, Dutch Country Roads, and Pittsburgh regions spent 20% or more of their trip dollars on recreation in 2017.

Traveler Spending by Category and Region

(in billions of U.S. dollars)

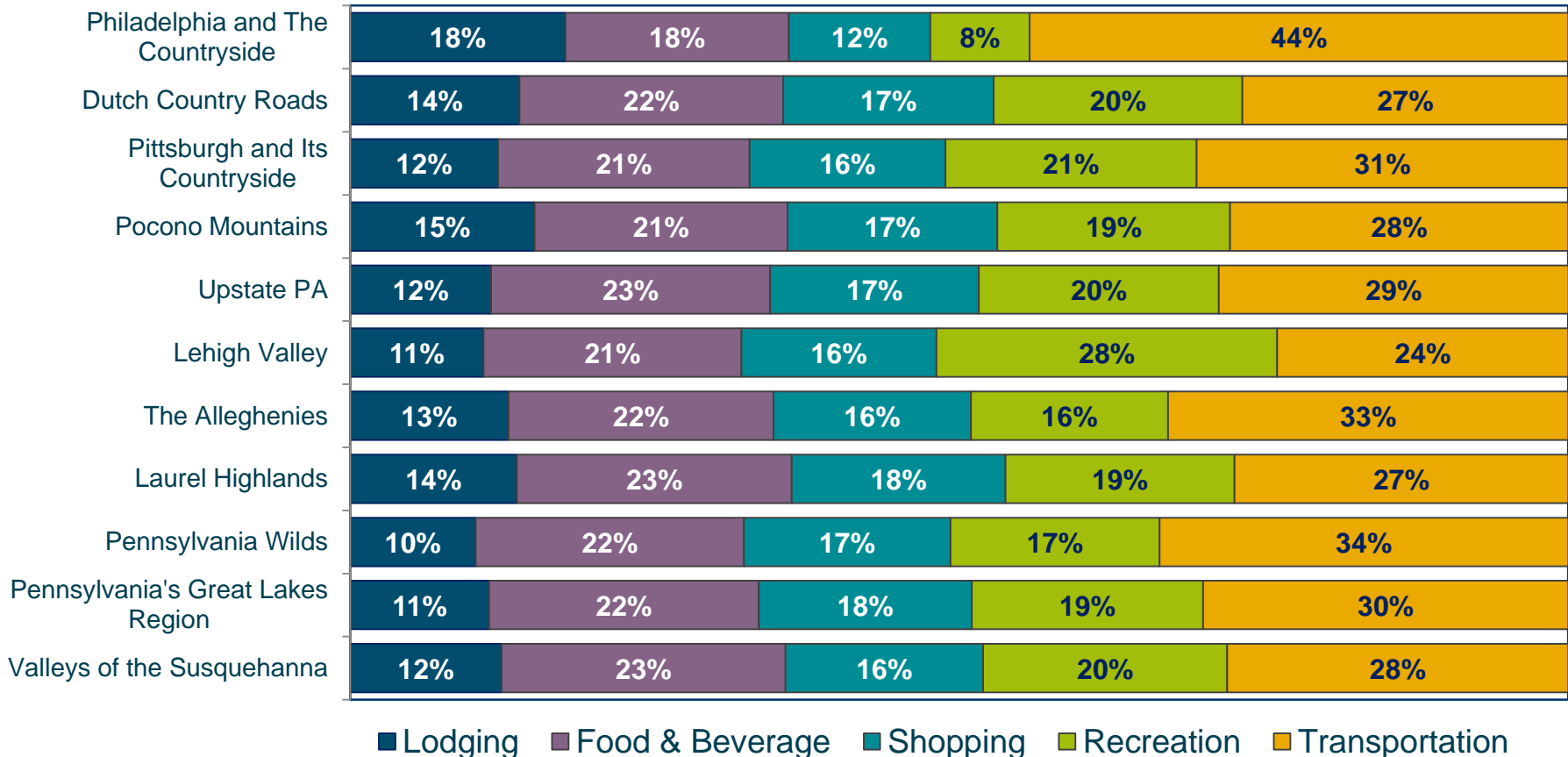


2017 Spending by Category -- % of Region Total

- Albeit with certain exceptions, the allocation of trip budgets by travelers and tourists is similar across the regions especially in terms of food & beverage, lodging, and retail (shopping).

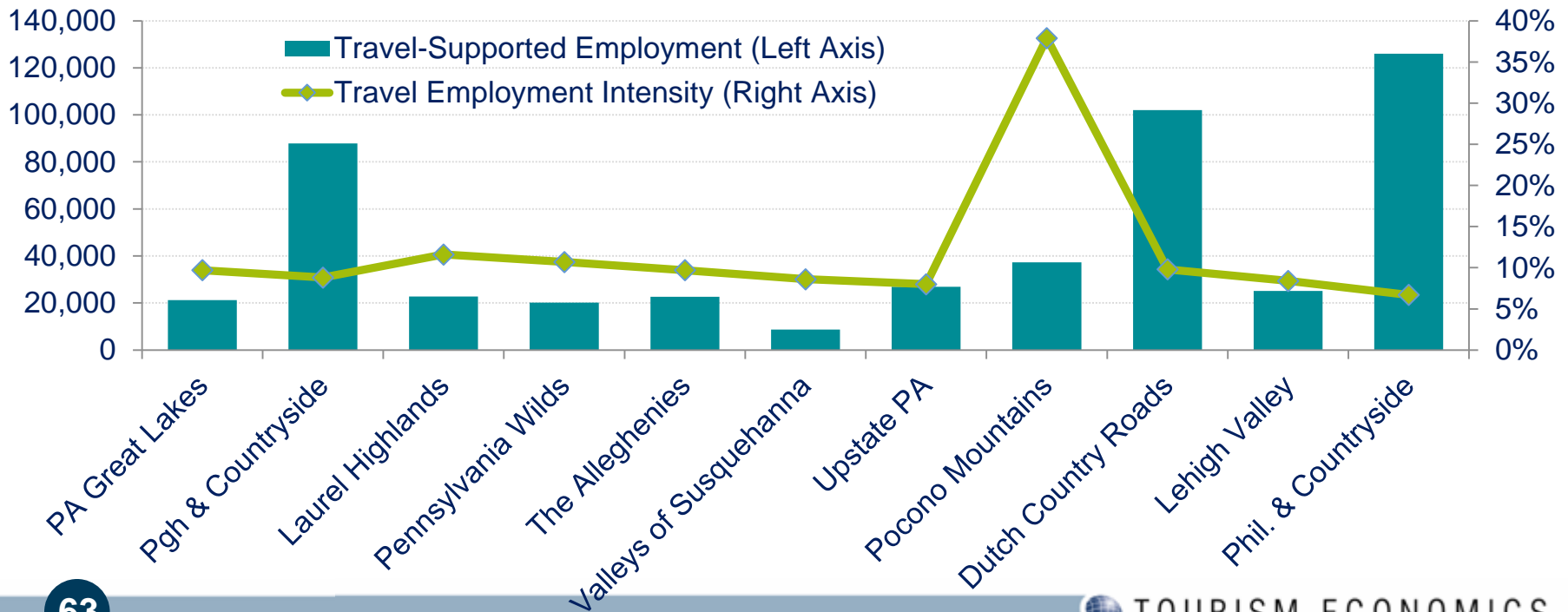
2017 Traveler Spending by Category and Region

Percent of Region Total



PA Total Travel ECONOMY Employment & Intensity, 2017

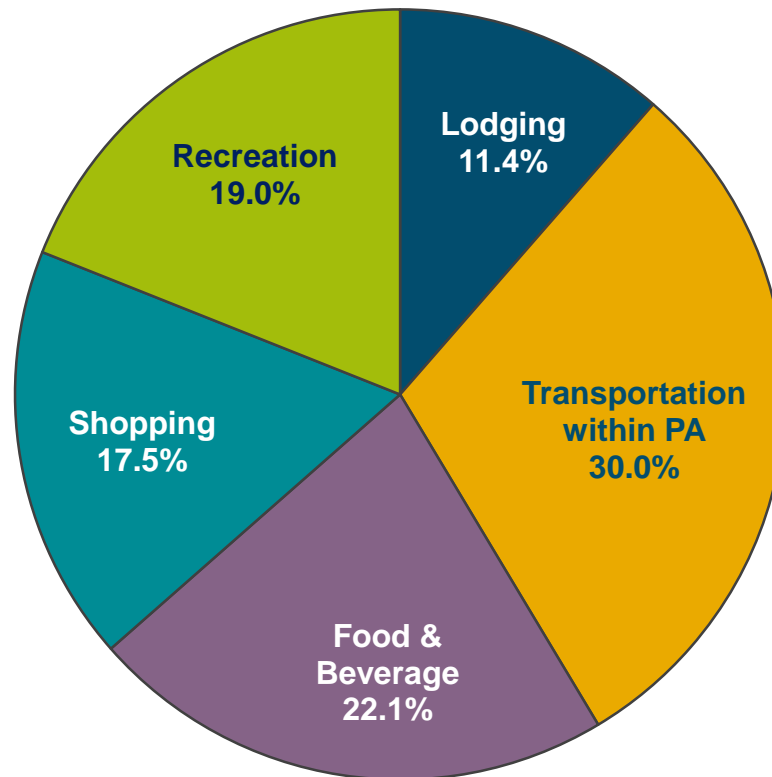
- Travel Employment Intensity is a measure of each county's reliance on the travel industry for jobs. As in prior years, the Philadelphia region had the highest number of travel-related jobs in 2017, but the Pocono Mountains region was by far the most dependent on the travel industry as a job provider, distantly followed by the Laurel Highlands, Pennsylvania Wilds, and Dutch Country Roads 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 \$1.7 billion in the region in 2017 – offsetting the small (0.9%) decrease of 2016 to reach a new record high.
- Shopping was a clear draw for travelers to the Pennsylvania Great Lakes Region in 2017, with the region ranking second among the state's 11 tourism regions in the percentage of total expenditures the region's travelers allocated for shopping/retail purchases, but 9th in the percentage spent on lodging.

Pennsylvania's Great Lakes Region 2017 Spending by Category

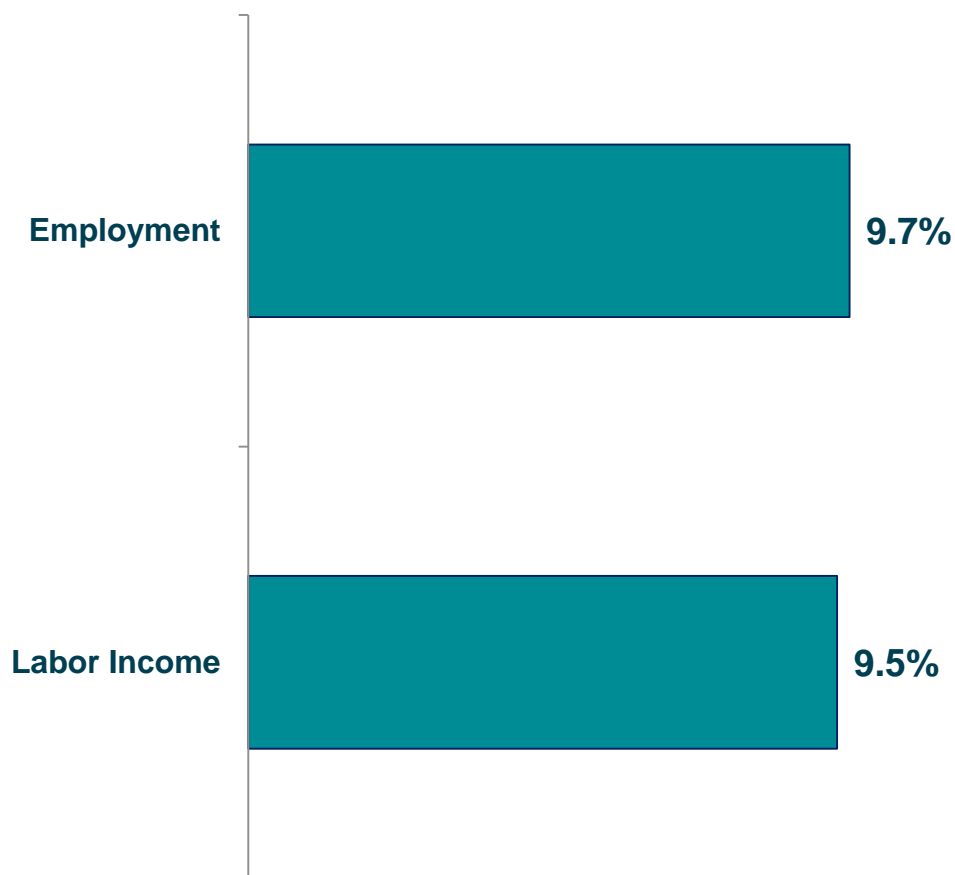


Source: Tourism Economics

Pennsylvania's Great Lakes Region

- The chart shows the travel economy's share (includes direct, indirect and induced impacts) of the region's total for both labor income and employment.
- The travel industry's share of the region's employment dropped slightly to 9.7% in 2017 from 9.8% in 2016, but was still higher than the 9.6%, 9.4%, and 9.2% shares of the three preceding years, respectively.
- Pennsylvania's Great Lakes Region continued to rank 9th in the number of jobs directly supported by tourism among PA's 11 tourism regions, but 5th in employment intensity in 2017.

Travel Industry Share of Regional Economy



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

PENNSYLVANIA'S GREAT LAKES REGION TRAVELER SPENDING, 2007 – 2017 (dollar amounts in millions)

County	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Crawford	\$258.4	\$274.9	\$219.7	\$241.5	\$250.8	\$260.3	\$265.6	\$259.0	\$258.1	\$248.1	\$251.7
Erie	778.8	876.0	741.2	829.4	897.4	930.7	925.4	941.0	960.9	969.1	988.8
Mercer	243.2	279.8	233.2	256.0	279.7	304.9	319.9	315.9	315.4	307.6	305.7
Venango	118.7	130.2	108.7	118.3	124.0	132.1	130.9	132.5	144.9	139.2	141.1
Region Total	\$1,399.0	\$1,560.8	\$1,302.7	\$1,445.2	\$1,551.8	\$1,628.1	\$1,641.9	\$1,648.4	\$1,679.2	\$1,664.0	\$1,687.3
% Change	3.6%	11.6%	-16.5%	10.9%	7.4%	4.9%	0.8%	0.4%	1.9%	-0.9%	1.4%

PENNSYLVANIA'S GREAT LAKES REGION TRAVEL INDUSTRY EMPLOYMENT, 2007 – 2017

County	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Crawford	2,261	2,237	2,091	2,160	2,171	2,122	2,150	2,151	2,166	2,156	2,123
Erie	7,114	7,095	6,674	7,004	7,181	7,347	7,516	7,639	7,715	7,765	7,796
Mercer	2,537	2,513	2,343	2,417	2,485	2,557	2,614	2,640	2,627	2,588	2,561
Venango	1,171	1,191	1,113	1,138	1,153	1,143	1,158	1,166	1,188	1,196	1,192
Region Total	13,084	13,036	12,221	12,719	12,989	13,169	13,437	13,596	13,696	13,706	13,672
% Change	-0.3%	-0.4%	-6.3%	4.1%	2.1%	1.4%	2.0%	1.2%	0.7%	0.1%	-0.2%

PA's Great Lakes Region – Traveler Spending by Category

PENNSYLVANIA'S GREAT LAKES REGION TRAVELER SPENDING BY CATEGORY, 2016 and 2017 (dollar amounts in millions)

2017	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Crawford	\$16.2	\$60.1	\$43.8	\$41.3	\$90.2	\$251.7
Erie	127.7	217.4	168.5	206.8	268.4	988.8
Mercer	38.4	72.0	62.4	53.1	79.8	305.7
Venango	10.3	23.8	20.6	18.9	67.5	141.1
Region Total	\$192.6	\$373.3	\$295.3	\$320.1	505.9	\$1,687.3
% Change	-1.4%	1.6%	0.8%	2.1%	2.2%	1.4%

2016	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Crawford	\$17.1	\$60.4	\$43.6	\$39.8	\$87.1	\$248.1
Erie	127.1	210.9	164.6	202.6	263.9	969.1
Mercer	40.0	72.0	63.7	52.7	79.1	307.6
Venango	11.0	23.8	21.1	18.4	64.9	139.2
Region Total	\$195.3	\$367.2	\$293.0	\$313.5	495.0	\$1,664.0

PA's Great Lakes Region – Tourism Satellite Account

PENNSYLVANIA'S GREAT LAKES REGION TOURISM SATELLITE ACCOUNT CATEGORIES, 2016 and 2017 (dollar amounts in millions)

2017	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Crawford	\$251.7	\$0.4	\$10.7	\$262.8
Erie	988.8	5.3	42.1	1,036.2
Mercer	305.7	0.8	13.0	319.6
Venango	141.1	0.2	6.0	147.4
Region Total	\$1,687.3	\$6.8	\$71.8	\$1,765.9
% Change	1.4%	-0.4%	-2.8%	1.2%

2016	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Crawford	\$248.1	\$0.4	\$11.0	\$259.5
Erie	969.1	5.3	43.0	1,017.4
Mercer	307.6	0.9	13.7	322.1
Venango	139.2	0.2	6.2	145.6
Region Total	\$1,664.0	\$6.8	\$73.9	\$1,744.7

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

PA's Great Lakes Region – Travel Industry Impacts, 2016 & 2017

PENNSYLVANIA'S GREAT LAKES REGION TRAVEL INDUSTRY IMPACTS, 2016 and 2017 (dollar amounts in millions)

2017	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Crawford	\$251.7	2,123	\$51.9	\$13.0	\$11.8
Erie	988.8	7,796	218.8	56.0	48.3
Mercer	305.7	2,561	58.3	15.7	13.7
Venango	141.1	1,192	31.5	7.5	6.9
Region Total	\$1,687.3	13,672	\$360.4	\$92.2	\$80.7
% Change	1.4%	-0.2%	4.7%	0.9%	0.4%

2016	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Crawford	\$248.1	2,156	\$50.9	\$13.0	\$11.9
Erie	969.1	7,765	207.1	55.2	47.7
Mercer	307.6	2,588	56.4	15.8	13.8
Venango	139.2	1,196	29.9	7.5	6.9
Region Total	\$1,664.0	13,706	\$344.2	\$91.4	\$80.3

PA's Great Lakes Region –Travel Economy Impacts, 2016 & 2017

PENNSYLVANIA'S GREAT LAKES REGION TRAVEL ECONOMY IMPACTS, 2016 and 2017 (dollar amounts in millions)

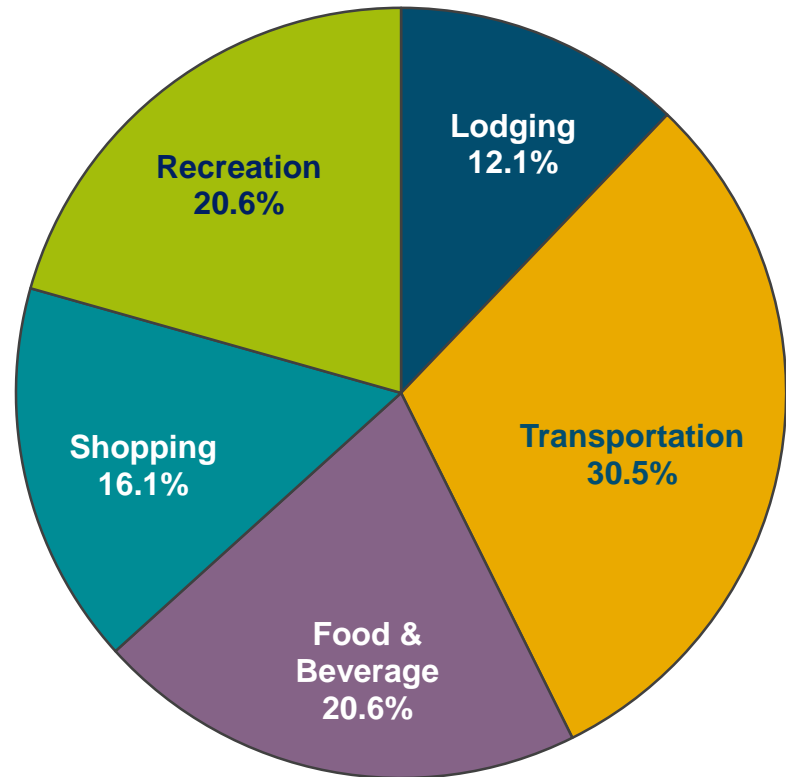
2017	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Crawford	\$262.8	3,366	\$99.0	\$22.9	\$23.7
Erie	1,036.2	11,928	412.3	96.1	97.3
Mercer	319.6	3,994	109.2	27.3	27.5
Venango	147.4	1,886	58.7	13.2	14.0
Region Total	\$1,765.9	21,175	\$679.2	\$159.6	\$162.5
% Change	1.2%	-1.3%	1.2%	1.0%	0.5%

2016	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Crawford	\$259.5	3,445	\$99.8	\$22.9	\$24.0
Erie	1,017.4	12,014	403.7	94.5	96.0
Mercer	322.1	4,087	109.5	27.5	27.8
Venango	145.6	1,914	58.3	13.1	13.9
Region Total	\$1,744.7	21,461	\$671.3	\$158.1	\$161.7

Pittsburgh & Its Countryside

- Pittsburgh & Its Countryside region is comprised of the following eight counties: Allegheny, Armstrong, Beaver, Butler, Greene, Indiana, Lawrence, and Washington.
- Travelers spent nearly \$8.2 billion in the region in 2017 – a new record high and a 3.2% increase that erased 2016's 1.8% drop. As in prior years, the region had the third highest level of traveler spending level of the state's tourism regions.
- Recreation was a big draw for travelers to the region in 2017. The region ranked second among the state's tourism regions for both the total amount travelers spent on, and the share of total travel budgets devoted to, recreational purchases.

Pittsburgh & Its Countryside Region 2017 Spending by Category

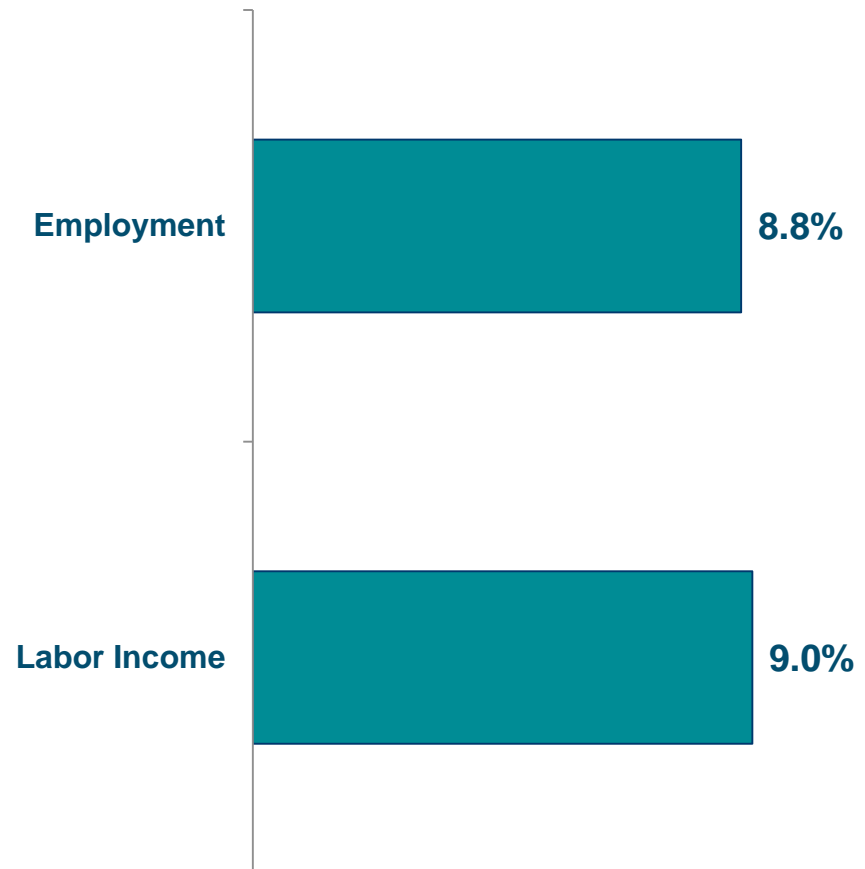


Source: Tourism Economics

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 employment remained at 8.8% in 2017, while the industry's share of the region's labor income rose 0.2 percentage point from 2016's level.
- As in prior years, the region continued to have the 3rd highest number of travel-supported jobs of the state's 11 tourism regions and to rank 7th in the industry's employment intensity in 2017.

Travel Industry Share of Regional Economy



Pittsburgh & Its Countryside – Traveler Spending & Employment Timelines

PITTSBURGH AND ITS COUNTRYSIDE TRAVELER SPENDING, 2007 – 2017 (dollar amounts in millions)

County	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Allegheny	\$4,360.9	\$4,979.8	\$4,354.6	\$4,828.1	\$5,231.2	\$5,494.0	\$5,575.1	\$5,675.2	\$5,987.7	\$5,950.2	\$6,137.9
Armstrong	71.2	75.3	58.6	71.3	84.0	89.8	91.3	90.8	88.9	88.4	92.4
Beaver	197.6	226.9	196.0	217.2	237.4	244.9	249.8	256.2	267.0	270.5	283.4
Butler	406.5	455.5	406.1	440.6	485.7	578.8	582.1	597.3	604.2	592.1	593.7
Greene	60.8	65.3	58.7	68.9	74.6	80.4	91.9	94.7	89.2	76.1	78.5
Indiana	135.3	152.6	144.5	154.2	169.7	184.3	179.1	175.3	162.0	155.4	162.1
Lawrence	95.0	101.4	83.7	98.6	113.4	118.9	117.9	119.6	120.1	126.5	126.8
Washington	451.2	497.1	482.3	582.7	668.4	740.7	755.3	760.0	747.0	662.7	703.7
Region Total	\$5,778.4	\$6,554.1	\$5,784.5	\$6,461.7	\$7,064.4	\$7,531.8	\$7,642.5	\$7,769.2	\$8,066.1	7,921.8	8,178.6
% Change	6.7%	13.4%	-11.7%	11.7%	9.3%	6.6%	1.5%	1.7%	3.8%	-1.8%	3.2%

PITTSBURGH AND ITS COUNTRYSIDE TRAVEL INDUSTRY EMPLOYMENT, 2007 – 2017

County	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Allegheny	36,767	37,591	36,188	37,302	38,112	39,094	39,964	40,254	40,888	41,529	42,295
Armstrong	517	530	484	554	559	568	573	576	584	594	608
Beaver	2,125	2,109	1,977	1,965	1,975	1,997	2,048	2,070	2,096	2,111	2,124
Butler	3,789	3,739	3,664	3,740	3,828	3,941	3,996	4,050	4,048	4,074	4,073
Greene	410	417	419	479	479	483	485	488	487	483	486
Indiana	1,320	1,342	1,347	1,351	1,381	1,427	1,450	1,460	1,426	1,422	1,443
Lawrence	854	863	806	873	877	896	907	917	909	927	933
Washington	4,877	4,995	5,026	5,570	5,740	5,840	5,949	5,953	5,948	5,856	5,875
Region Total	50,658	51,586	49,911	51,834	52,952	54,246	55,374	55,767	56,388	56,996	57,838
% Change	2.6%	1.8%	-3.2%	3.9%	2.2%	2.4%	2.1%	0.7%	1.1%	1.1%	1.5%

Pittsburgh & Its Countryside – Traveler Spending by Category

PITTSBURGH AND ITS COUNTRYSIDE TRAVELER SPENDING BY CATEGORY, 2016 and 2017 (dollar amounts in millions)

2017	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Allegheny	\$776.4	\$1,243.0	\$973.4	\$1,253.2	\$1,891.9	\$6,137.9
Armstrong	4.1	18.6	12.2	27.2	30.4	92.4
Beaver	20.3	60.0	44.8	44.8	113.5	283.4
Butler	78.8	135.3	108.5	103.2	168.0	593.7
Greene	9.8	18.3	12.9	12.7	24.9	78.5
Indiana	18.1	39.9	29.5	28.4	46.2	162.1
Lawrence	6.9	28.8	23.8	23.9	37.4	126.8
Washington	79.0	144.0	110.1	187.1	183.5	703.7
Region Total	\$993.4	\$1,687.9	\$1,315.1	\$1,686.4	\$2,495.8	8,178.6
% Change	1.7%	3.6%	2.1%	4.7%	3.2%	3.2%

2016	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Allegheny	\$766.6	\$1,202.2	\$953.0	\$1,194.9	\$1,833.5	\$5,950.2
Armstrong	3.8	17.6	11.8	26.2	29.0	88.4
Beaver	19.7	57.7	44.1	43.0	106.0	270.5
Butler	80.9	132.5	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	29.7	37.2	126.5
Washington	71.3	135.1	103.5	176.6	176.2	662.7
Region Total	\$976.4	\$1,629.0	\$1,288.0	\$1,610.0	\$2,418.4	7,921.8

Pittsburgh & Its Countryside – Tourism Satellite Account

PITTSBURGH AND ITS COUNTRYSIDE TOURISM SATELLITE ACCOUNT CATEGORIES, 2016 and 2017 (dollar amounts in millions)

2017	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Allegheny	\$6,137.9	\$38.0	\$261.2	\$6,437.1
Armstrong	92.4	0.1	3.9	96.5
Beaver	283.4	0.5	12.1	296.0
Butler	593.7	2.2	25.3	621.2
Greene	78.5	0.2	3.3	82.1
Indiana	162.1	0.5	6.9	169.5
Lawrence	126.8	0.2	5.4	132.4
Washington	703.7	1.7	29.9	735.3
Region Total	8,178.6	\$43.4	\$348.0	\$8,570.1
% Change	3.2%	-0.1%	-1.1%	3.0%

2016	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Allegheny	\$5,950.2	\$38.0	\$264.2	\$6,252.4
Armstrong	88.4	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	162.7
Lawrence	126.5	0.2	5.6	132.3
Washington	662.7	1.7	29.4	693.8
Region Total	7,921.8	\$43.5	\$351.8	\$8,317.1

*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, 2016 & 2017

PITTSBURGH AND ITS COUNTRYSIDE TRAVEL INDUSTRY IMPACTS, 2016 and 2017 (dollar amounts in millions)

2017	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Allegheny	\$6,137.9	42,295	\$1,689.8	\$383.7	\$343.8
Armstrong	92.4	608	16.1	4.5	3.9
Beaver	283.4	2,124	62.9	15.1	13.9
Butler	593.7	4,073	115.0	31.2	26.8
Greene	78.5	486	12.1	3.8	3.1
Indiana	162.1	1,443	35.3	8.7	7.8
Lawrence	126.8	933	25.9	6.5	5.9
Washington	703.7	5,875	194.1	41.4	39.5
Region Total	8,178.6	57,838	\$2,151.1	\$494.8	\$444.7
% Change	3.2%	1.5%	6.6%	2.8%	2.5%

2016	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Allegheny	\$5,950.2	41,529	\$1,584.9	\$373.7	\$335.6
Armstrong	88.4	594	15.0	4.3	3.8
Beaver	270.5	2,111	60.0	14.6	13.6
Butler	592.1	4,074	110.2	31.2	26.9
Greene	76.1	483	11.5	3.7	3.1
Indiana	155.4	1,422	33.3	8.5	7.7
Lawrence	126.5	927	24.4	6.3	5.7
Washington	662.7	5,856	178.4	39.2	37.6
Region Total	7,921.8	56,996	\$2,017.6	\$481.5	\$433.9

Pittsburgh & Its Countryside – Travel Economy Impacts, 2016 & 2017

PITTSBURGH AND ITS COUNTRYSIDE TRAVEL ECONOMY IMPACTS, 2016 and 2017 (dollar amounts in millions)

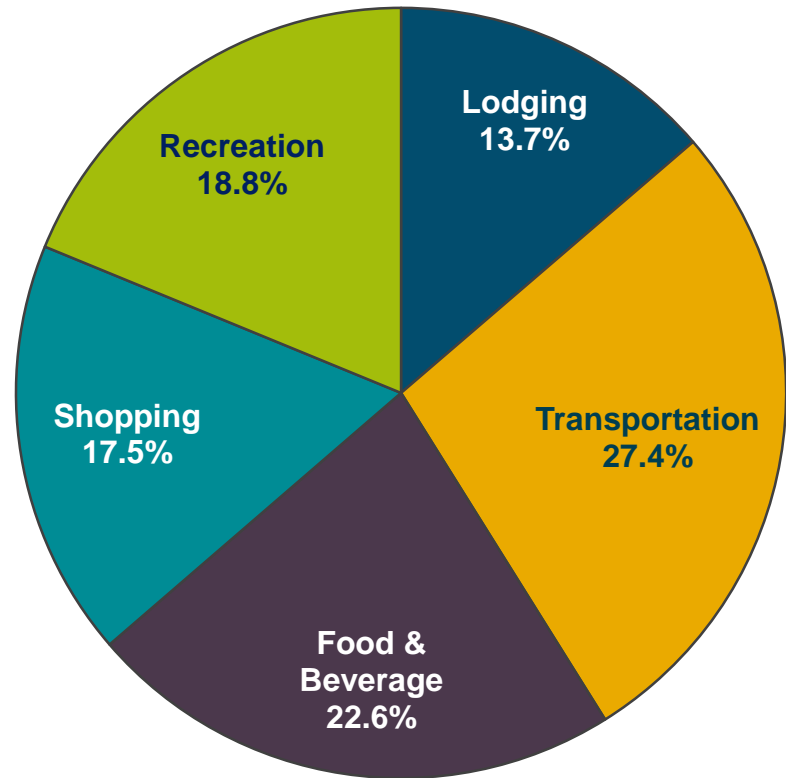
2017	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Allegheny	\$6,437.1	62,718	\$3,144.5	\$657.7	\$693.6
Armstrong	96.5	1,198	29.4	7.9	7.9
Beaver	296.0	3,674	118.3	26.6	27.9
Butler	621.2	6,416	219.0	54.0	54.0
Greene	82.1	841	21.5	6.5	6.3
Indiana	169.5	2,375	67.4	15.3	15.8
Lawrence	132.4	1,713	48.0	11.5	11.9
Washington	735.3	8,926	360.2	72.8	79.6
Region Total	\$8,570.1	87,862	\$4,008.3	\$852.2	\$896.9
% Change	3.0%	0.1%	2.3%	3.0%	2.5%

2016	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Allegheny	\$6,252.4	62,397	\$3,075.7	\$639.2	\$676.7
Armstrong	92.5	1,192	28.8	7.6	7.7
Beaver	283.0	3,700	116.9	25.8	27.4
Butler	620.6	6,469	215.6	53.9	54.1
Greene	79.7	863	21.8	6.4	6.2
Indiana	162.7	2,380	65.5	14.8	15.4
Lawrence	132.3	1,725	47.3	11.1	11.5
Washington	693.8	9,029	346.8	68.9	75.8
Region Total	\$8,317.1	87,756	\$3,918.4	\$827.7	\$874.8

Laurel Highlands

- The Laurel Highlands in southwestern PA is comprised of the following counties: Fayette, Somerset, and Westmorland.
- Travelers spent more than \$1.8 billion in the region in 2017, just off the record high seen in 2014 – with a 3.5% increase that completely offset the 3.4% drop in 2016.
- Travelers to the region liked to shop with the region posting the highest share of travelers' trip budgets spent on shopping and the third highest on food & beverage purchases among the state's 11 tourism regions in 2017.

Laurel Highlands Region 2017 Spending by Category

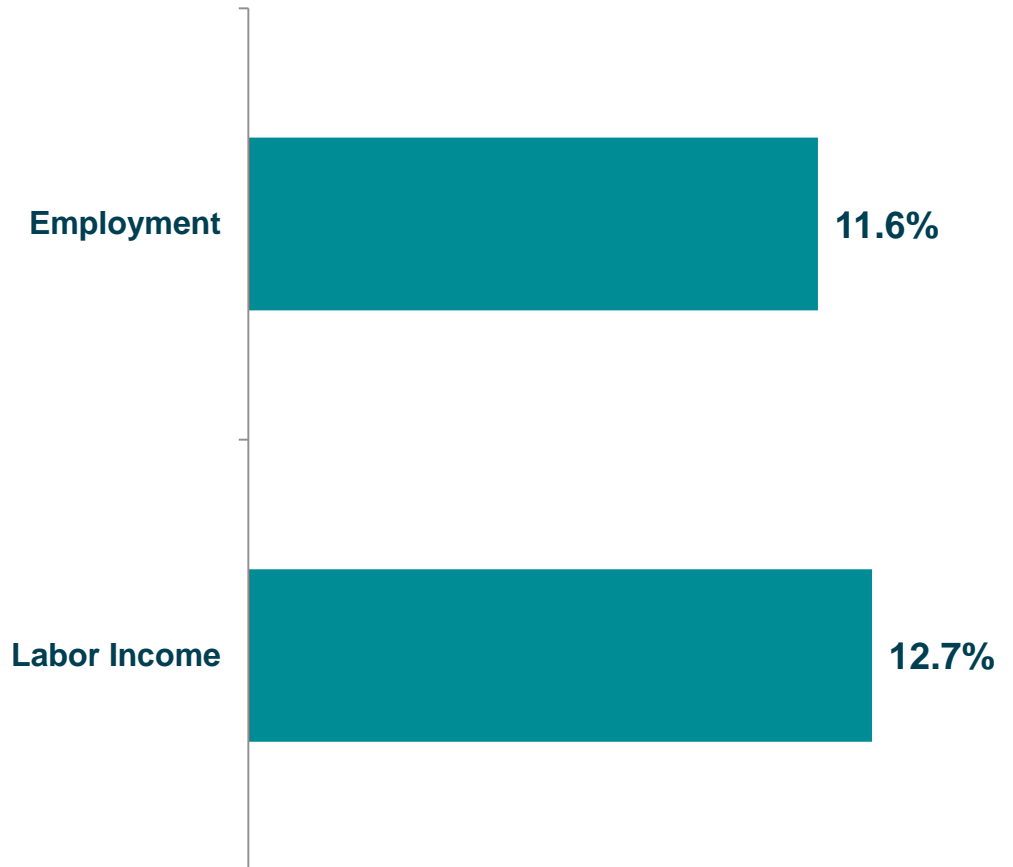


Source: Tourism Economics

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 11.6% of regional employment in 2017. The region continued to have the second highest percentage of travel-supported jobs among the state's 11 tourism regions and to rank 7th in the actual number of travel-supported jobs.
- The travel industry's share of the Laurel Highlands region total labor income was 12.7% in 2017 – a small increase from 2016.

Travel Industry Share of Regional Economy



Laurel Highlands – Traveler Spending & Employment Timelines

LAUREL HIGHLANDS TRAVELER SPENDING, 2007 – 2017 (dollar amounts in millions)

County	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Fayette	\$563.6	\$618.4	\$538.2	\$595.7	\$636.0	\$643.9	\$663.8	\$677.5	\$667.2	\$661.5	\$684.8
Somerset	325.2	357.2	306.9	330.1	371.0	378.7	380.2	387.7	399.9	377.3	392.0
Westmoreland	623.5	706.4	587.6	651.6	724.7	745.9	742.6	772.2	753.9	721.1	745.4
Region Total	\$1,512.2	\$1,682.0	\$1,432.6	\$1,577.3	\$1,731.7	\$1,768.5	\$1,786.6	\$1,837.4	\$1,821.1	\$1,759.9	\$1,822.2
% Change	1.3%	11.2%	-14.8%	10.1%	9.8%	2.1%	1.0%	2.8%	-0.9%	-3.4%	3.5%

LAUREL HIGHLANDS TRAVEL INDUSTRY EMPLOYMENT, 2007 – 2017

County	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Fayette	5,272	5,241	5,047	5,219	5,295	5,417	5,808	5,836	5,834	5,852	5,914
Somerset	3,431	3,449	3,255	3,234	3,257	3,193	3,285	3,331	3,322	3,232	3,261
Westmoreland	5,539	5,582	5,243	5,369	5,476	5,632	5,716	5,764	5,661	5,648	5,703
Region Total	14,242	14,272	13,544	13,822	14,028	14,242	14,809	14,932	14,817	14,732	14,878
% Change	0.1%	0.2%	-5.1%	2.1%	1.5%	1.5%	4.0%	0.8%	-0.8%	-0.6%	1.0%

Laurel Highlands – Traveler Spending by Category

LAUREL HIGHLANDS TRAVELER SPENDING BY CATEGORY, 2016 and 2017 (dollar amounts in millions)

2017	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Fayette	\$121.8	\$155.6	\$114.2	\$135.0	\$158.2	\$684.8
Somerset	54.9	90.1	63.7	71.8	111.5	392.0
Westmoreland	72.9	165.4	141.6	135.7	229.8	745.4
Region Total	\$249.6	\$411.0	\$319.5	\$342.5	\$499.5	\$1,822.2
% Change	3.3%	4.0%	2.5%	4.4%	3.4%	3.5%

2016	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Fayette	\$117.8	\$149.6	\$111.1	\$129.3	\$153.6	\$661.5
Somerset	52.8	86.3	62.3	68.3	107.7	377.3
Westmoreland	71.2	159.4	138.4	130.5	221.6	721.1
Region Total	\$241.8	\$395.3	\$311.8	\$328.1	\$482.9	\$1,759.9

Laurel Highlands – Tourism Satellite Account

LAUREL HIGHLANDS TOURISM SATELLITE ACCOUNT CATEGORIES, 2016 and 2017 (dollar amounts in millions)

2017	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Fayette	\$684.8	\$1.5	\$29.1	\$715.4
Somerset	392.0	1.0	16.7	409.6
Westmoreland	745.4	1.9	31.7	779.0
Region Total	\$1,822.2	\$4.3	\$77.5	\$1,904.0
% Change	3.5%	-0.2%	-0.8%	3.3%

2016	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Fayette	\$661.5	\$1.5	\$29.4	\$692.4
Somerset	377.3	1.0	16.8	395.0
Westmoreland	721.1	1.9	32.0	755.0
Region Total	\$1,759.9	\$4.3	\$78.2	\$1,842.4

*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, 2016 & 2017

LAUREL HIGHLANDS TRAVEL INDUSTRY IMPACTS, 2016 and 2017 (dollar amounts in millions)

2017	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Fayette	\$684.8	5,914	\$180.6	\$39.3	\$37.3
Somerset	392.0	3,261	92.8	21.6	20.0
Westmoreland	745.4	5,703	148.5	38.6	34.2
Region Total	\$1,822.2	14,878	\$422.0	\$99.6	\$91.5
% Change	3.5%	1.0%	5.8%	2.6%	2.0%

2016	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Fayette	\$661.5	5,852	\$170.6	\$38.3	\$36.6
Somerset	377.3	3,232	88.6	22.1	19.7
Westmoreland	721.1	5,648	139.6	37.6	33.5
Region Total	\$1,759.9	14,732	\$398.8	\$97.0	\$89.7

Laurel Highlands – Travel Economy Impacts, 2016 & 2017

LAUREL HIGHLANDS TRAVEL ECONOMY IMPACTS, 2016 and 2017 (dollar amounts in millions)

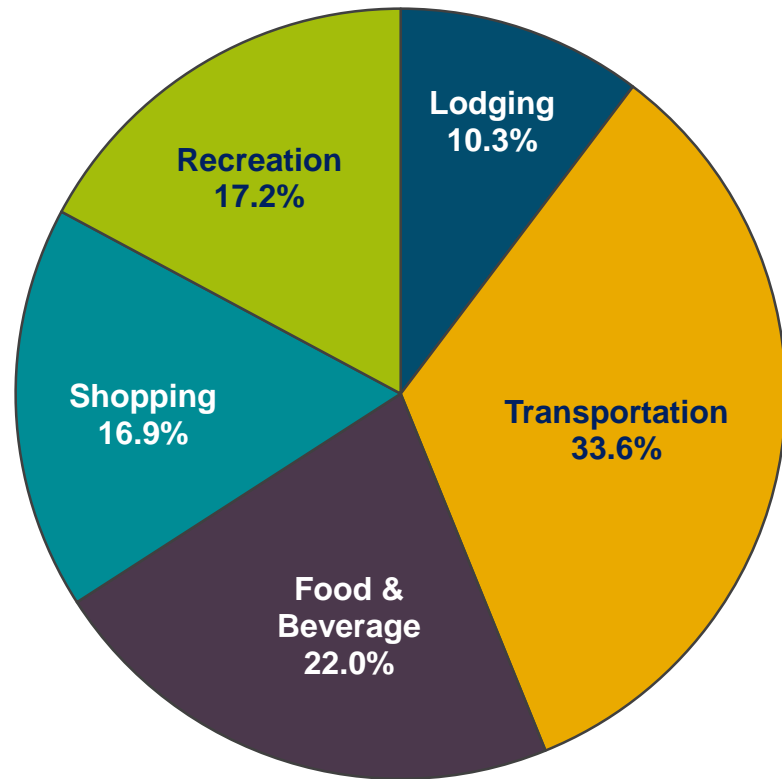
2017	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Fayette	\$715.4	8,396	\$340.2	\$69.3	\$75.2
Somerset	409.6	4,754	175.4	38.0	40.2
Westmoreland	779.0	9,617	281.2	67.6	69.1
Region Total	\$1,904.0	22,768	\$796.8	\$174.8	\$184.3
% Change	3.3%	-0.4%	2.3%	2.7%	2.0%

2016	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Fayette	\$692.4	8,417	\$332.3	\$67.4	\$73.7
Somerset	395.0	4,807	173.2	37.1	39.6
Westmoreland	755.0	9,642	273.1	65.8	67.4
Region Total	\$1,842.4	22,866	\$778.6	\$170.2	\$180.7

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 nearly \$1.8 billion in the Pennsylvania Wilds region in 2017 – a new record high reflecting a 3.6% increase that more than offset the 1.3% drop in 2016.
- As in prior years, travelers to the region spent a relatively large share of their trip budgets on transportation and small proportion on lodging, with the region ranking 2nd and 11th among the state’s tourism regions for these spending categories.

Pennsylvania Wilds Region 2017 Spending by Category

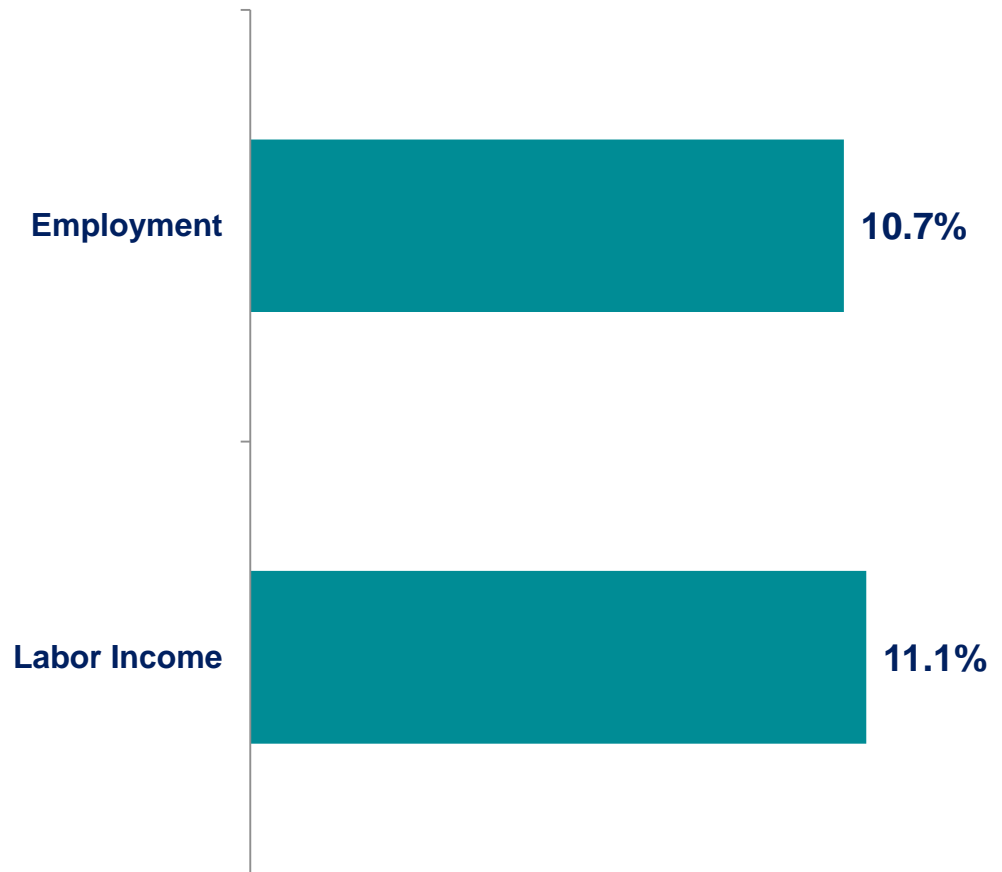


Source: Tourism Economics

Pennsylvania Wilds

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- The travel industry accounted for 10.7% of the region's employment in 2017.
- The Pennsylvania Wilds travel industry provided 11.1% of the labor income earned in the region in 2017 – 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, 2007 – 2017 (dollar amounts in millions)

County	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Cameron	\$8.4	\$9.3	\$7.8	\$9.0	\$9.5	\$9.6	\$9.6	\$9.4	\$9.7	\$10.1	\$10.1
Clarion	101.7	112.0	93.5	108.1	112.5	118.6	121.5	115.4	117.7	118.9	125.5
Clearfield	233.5	250.3	212.3	248.9	261.8	264.3	265.5	276.5	270.0	266.1	277.3
Clinton	111.1	123.2	108.0	136.6	151.4	153.9	150.6	147.5	147.7	140.5	149.9
Elk	51.5	57.9	47.2	52.3	61.4	66.1	66.0	69.3	74.7	77.9	80.2
Forest	19.7	21.2	18.5	20.4	23.7	22.6	23.4	23.2	27.0	26.3	27.2
Jefferson	92.6	97.8	82.2	102.9	109.9	113.6	115.1	115.1	119.1	116.0	124.1
Lycoming	255.6	293.1	269.3	308.7	384.4	398.2	405.9	391.3	382.5	370.6	379.3
McKean	126.1	138.9	123.2	158.9	164.0	173.4	174.5	174.7	174.6	172.9	180.0
Potter	26.6	29.3	27.0	30.1	36.6	34.3	34.5	35.4	38.8	37.7	40.2
Tioga	149.1	159.1	139.5	171.2	192.3	193.4	187.6	190.9	195.2	193.3	193.5
Warren	137.0	157.8	137.7	149.3	162.5	169.4	169.3	173.8	178.6	182.2	186.8
Region Total	\$1,312.9	\$1,450.1	\$1,266.2	\$1,496.4	\$1,670.0	\$1,717.3	\$1,723.4	\$1,722.4	\$1,735.6	\$1,712.4	\$1,774.1
% Change	5.1%	10.4%	-12.7%	18.2%	11.6%	2.8%	0.4%	-0.1%	0.8%	-1.3%	3.6%

Pennsylvania Wilds – Employment Timeline

PENNSYLVANIA WILDS TRAVEL INDUSTRY EMPLOYMENT, 2007 – 2017

County	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Cameron	78	79	73	74	75	75	76	76	76	77	77
Clarion	947	963	899	972	993	1,022	1,046	1,051	1,071	1,111	1,114
Clearfield	1,594	1,623	1,594	1,770	1,793	1,775	1,778	1,817	1,799	1,812	1,836
Clinton	818	835	798	952	990	993	1,040	1,045	1,064	1,069	1,073
Elk	495	496	462	488	509	531	554	557	573	591	596
Forest	129	131	124	135	136	137	137	138	138	136	139
Jefferson	719	732	683	747	762	785	804	807	821	816	828
Lycoming	2,553	2,573	2,538	2,707	2,790	2,901	2,973	2,961	2,952	2,930	2,951
McKean	1,008	997	943	1,112	1,130	1,114	1,138	1,144	1,164	1,166	1,197
Potter	193	197	195	206	216	229	241	242	246	245	253
Tioga	1,250	1,253	1,215	1,387	1,451	1,462	1,530	1,535	1,573	1,623	1,630
Warren	1,142	1,154	1,123	1,133	1,149	1,120	1,141	1,147	1,156	1,167	1,177
Region Total	10,926	11,032	10,648	11,684	11,993	12,142	12,456	12,519	12,632	12,743	12,872
% Change	1.4%	1.0%	-3.5%	9.7%	2.6%	1.2%	2.6%	0.5%	0.9%	0.9%	1.0%

Pennsylvania Wilds – Traveler spending by category, 2017

PENNSYLVANIA WILDS TRAVELER SPENDING BY CATEGORY, 2017 (dollar amounts in millions)

2017	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Cameron	\$0.6	\$1.9	\$1.8	\$2.7	\$3.1	\$10.1
Clarion	15.9	28.5	22.3	23.8	35.0	125.5
Clearfield	27.4	60.7	52.5	46.3	90.4	277.3
Clinton	13.6	33.9	24.0	26.6	51.8	149.9
Elk	10.3	19.9	14.9	13.8	21.4	80.2
Forest	4.2	5.7	5.3	5.0	7.1	27.2
Jefferson	9.8	22.8	17.8	22.3	51.3	124.1
Lycoming	46.7	90.7	63.4	59.8	118.7	379.3
McKean	18.8	37.1	27.1	30.1	67.0	180.0
Potter	5.9	8.5	6.9	7.2	11.7	40.2
Tioga	21.4	43.5	33.4	35.3	59.9	193.5
Warren	8.1	37.6	31.3	31.6	78.1	186.8
Region Total	\$182.8	\$390.8	\$300.6	\$304.5	\$595.5	\$1,774.1
% Change	2.5%	3.8%	1.3%	5.0%	4.3%	3.6%

Pennsylvania Wilds –Traveler spending by category, 2016

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

2016	Lodging	Food & Beverage	Shopping	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	58.1	51.1	43.6	86.8	266.1
Clinton	12.1	31.8	22.9	24.7	49.1	140.5
Elk	10.0	19.1	14.6	13.3	20.9	77.9
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	46.9	88.4	63.9	57.2	114.1	370.6
McKean	18.2	35.8	27.0	28.5	63.4	172.9
Potter	5.4	7.9	6.5	6.8	11.0	37.7
Tioga	22.6	43.1	33.8	34.7	59.0	193.3
Warren	8.8	36.7	31.4	30.7	74.5	182.2
Region Total	\$178.4	\$376.6	\$296.7	\$289.9	\$570.9	\$1,712.4

Pennsylvania Wilds – Tourism Satellite Account, 2017

PENNSYLVANIA WILDS TOURISM SATELLITE ACCOUNT CATEGORIES, 2017 (dollar amounts in millions)				
2017	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Cameron	\$10.1	\$0.0	\$0.4	\$10.6
Clarion	125.5	0.3	5.3	131.1
Clearfield	277.3	0.7	11.8	289.7
Clinton	149.9	0.4	6.4	156.6
Elk	80.2	0.2	3.4	83.8
Forest	27.2	0.1	1.2	28.5
Jefferson	124.1	0.2	5.3	129.6
Lycoming	379.3	1.0	16.1	396.4
McKean	180.0	0.4	7.7	188.1
Potter	40.2	0.1	1.7	42.0
Tioga	193.5	0.4	8.2	202.2
Warren	186.8	0.2	7.9	195.0
Region Total	\$1,774.1	\$3.9	\$75.5	\$1,853.5
% Change	3.6%	-0.2%	-0.7%	3.4%

*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, 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	124.4
Clearfield	266.1	0.7	11.8	278.6
Clinton	140.5	0.4	6.2	147.1
Elk	77.9	0.2	3.5	81.6
Forest	26.3	0.1	1.2	27.5
Jefferson	116.0	0.2	5.1	121.3
Lycoming	370.6	1.0	16.5	388.0
McKean	172.9	0.4	7.7	180.9
Potter	37.7	0.1	1.7	39.5
Tioga	193.3	0.4	8.6	202.3
Warren	182.2	0.3	8.1	190.6
Region Total	\$1,712.4	\$3.9	\$76.0	\$1,792.4

*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, 2017

PENNSYLVANIA WILDS TRAVEL INDUSTRY IMPACTS, 2017 (dollar amounts in millions)

2017	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Cameron	\$10.1	77	\$1.5	\$0.5	\$0.4
Clarion	125.5	1,114	26.6	6.6	6.0
Clearfield	277.3	1,836	53.2	14.1	12.5
Clinton	149.9	1,073	29.5	7.7	6.8
Elk	80.2	596	13.1	3.9	3.3
Forest	27.2	139	3.9	1.3	1.0
Jefferson	124.1	828	25.5	6.4	5.8
Lycoming	379.3	2,951	81.2	20.2	18.2
McKean	180.0	1,197	33.4	9.0	7.9
Potter	40.2	253	6.1	1.9	1.6
Tioga	193.5	1,630	44.4	10.5	9.7
Warren	186.8	1,177	29.4	8.7	7.5
Region Total	\$1,774.1	12,872	\$347.8	\$90.8	\$80.7
% Change	3.6%	1.0%	5.4%	2.5%	1.7%

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	1,111	25.6	6.4	5.9
Clearfield	266.1	1,812	50.1	13.7	12.2
Clinton	140.5	1,069	28.5	7.4	6.7
Elk	77.9	591	12.5	3.8	3.3
Forest	26.3	136	3.7	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	172.9	1,166	31.3	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	182.2	1,167	27.8	8.6	7.4
Region Total	\$1,712.4	12,743	\$330.1	\$88.6	\$79.3

Pennsylvania Wilds –Travel Economy Impacts, 2017

PENNSYLVANIA WILDS TRAVEL ECONOMY IMPACTS, 2017 (dollar amounts in millions)

2017	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Cameron	\$10.6	131	\$2.8	\$0.8	\$0.8
Clarion	131.1	1,749	52.0	11.6	12.0
Clearfield	289.7	2,949	100.1	24.8	25.1
Clinton	156.6	1,677	55.9	13.5	13.7
Elk	83.8	966	25.1	6.8	6.6
Forest	28.5	235	7.3	2.2	2.1
Jefferson	129.6	1,392	47.7	11.3	11.7
Lycoming	396.4	4,570	151.5	35.3	36.6
McKean	188.1	1,834	62.4	15.8	16.0
Potter	42.0	425	11.7	3.3	3.2
Tioga	202.2	2,412	81.5	18.5	19.5
Warren	195.0	1,842	55.7	15.4	15.1
Region Total	\$1,853.5	20,182	\$653.7	\$159.3	\$162.4
% Change	3.4%	-0.2%	1.5%	2.6%	1.7%

Pennsylvania Wilds –Travel Economy Impacts, 2016

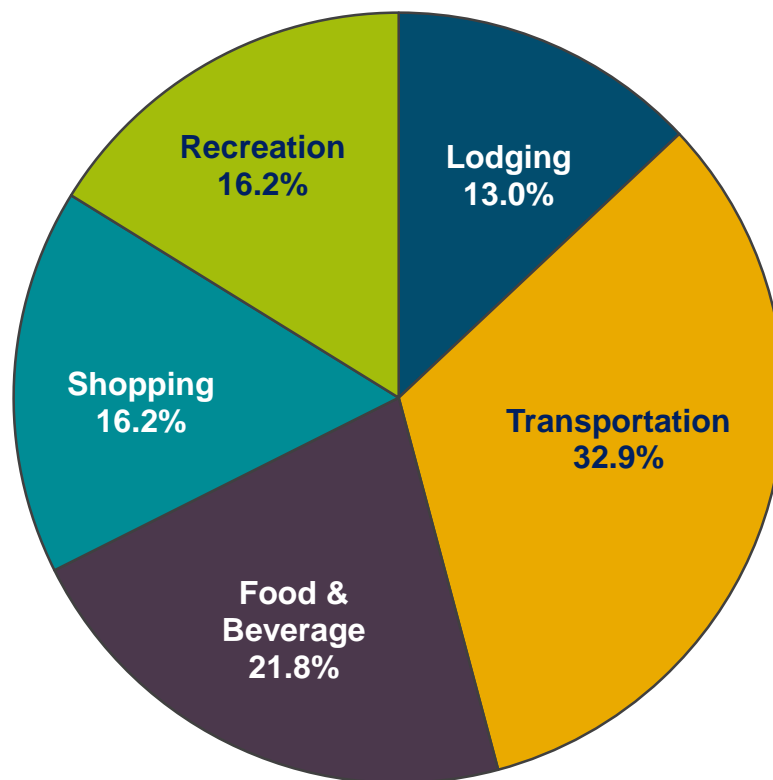
PENNSYLVANIA WILDS TRAVEL ECONOMY IMPACTS, 2016 (dollar amounts in millions)

2016	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Cameron	\$10.5	133	\$2.9	\$0.8	\$0.8
Clarion	124.4	1,747	50.5	11.3	11.8
Clearfield	278.6	2,950	97.7	24.0	24.5
Clinton	147.1	1,689	55.7	13.0	13.5
Elk	81.6	968	24.5	6.7	6.6
Forest	27.5	234	7.2	2.2	2.1
Jefferson	121.3	1,393	46.9	10.8	11.3
Lycoming	388.0	4,607	151.5	34.9	36.4
McKean	180.9	1,820	60.9	15.3	15.5
Potter	39.5	421	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	\$1,792.4	20,228	\$643.9	\$155.3	\$159.7

The Alleghenies

- The Alleghenies is comprised of the following counties: Bedford, Blair, Cambria, Centre, Fulton, Huntingdon, Juniata, and Mifflin.
- Travelers spent close to \$2.1 billion in The Alleghenies region in 2017 – a 4.7% increase from 2016 and new record high.
- 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 shopping and recreation purchases with rankings of 8th and 10th, respectively.

The Alleghenies Region 2017 Spending by Category

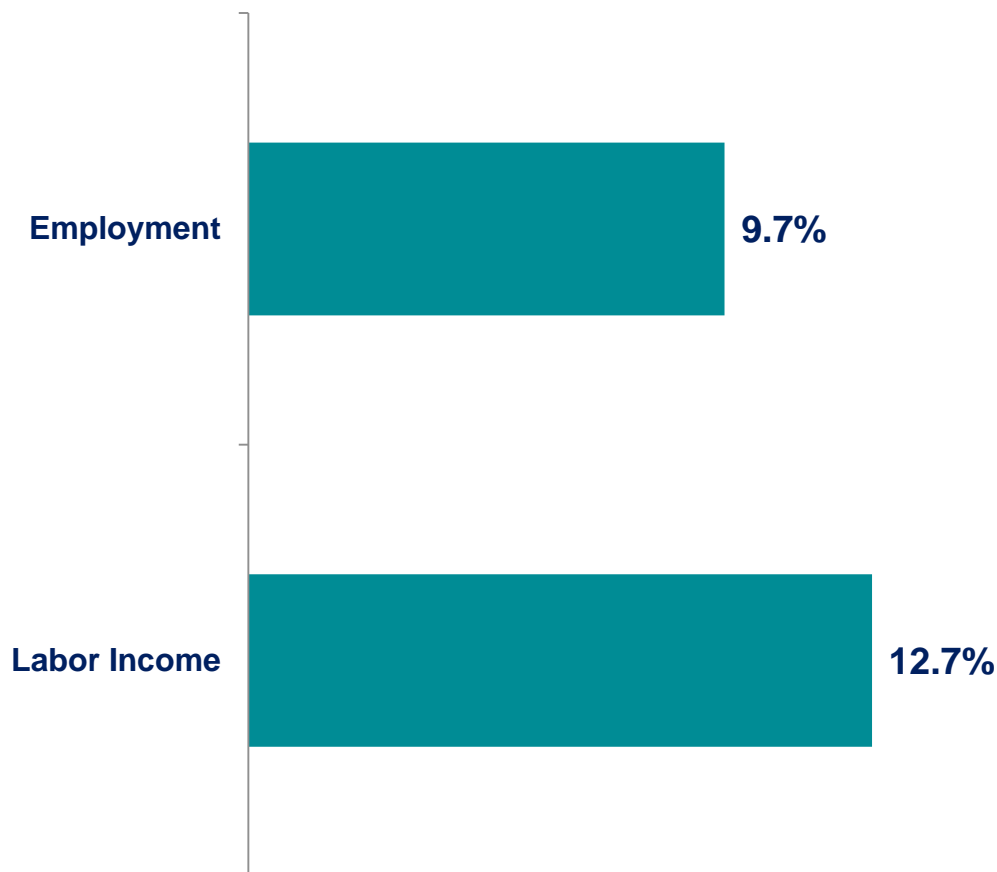


Source: Tourism Economics

The Alleghenies

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- The travel industry was responsible for 9.7% of the region's employment share – unchanged from 2016, and 12.7% of the labor income generated in the region, a 0.2 percentage point increase.
- The region ranked 8th among the state's tourism regions in the number of jobs supported by the travel and tourism industry, but 6th in employment intensity (i.e., the percentage of travel-supported jobs relative to the region's total employment number).

Travel Industry Share of Regional Economy



The Alleghenies – Traveler Spending & Employment Timelines

THE ALLEGHENIES TRAVELER SPENDING, 2007 – 2017

County	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Bedford	\$259.6	\$286.0	\$239.0	\$263.0	\$274.7	\$280.2	\$282.9	\$283.9	\$284.9	\$287.3	\$297.4
Blair	278.1	296.8	249.3	271.2	295.3	307.4	309.6	312.9	324.9	335.2	358.0
Cambria	244.3	280.9	238.5	257.6	290.5	303.4	301.0	302.9	308.1	310.9	315.8
Centre	531.4	616.4	545.6	588.7	649.3	654.3	694.1	720.2	741.8	748.4	794.2
Fulton	20.4	22.4	17.4	19.3	21.7	23.7	23.5	23.2	23.3	23.5	24.7
Huntingdon	135.3	146.6	129.1	144.1	153.1	162.8	161.7	160.4	163.9	166.5	173.0
Juniata	30.3	33.4	28.5	31.0	34.8	36.3	36.8	36.5	37.2	36.7	36.7
Mifflin	60.8	67.0	54.4	58.9	62.8	63.5	64.9	65.2	65.2	65.3	66.4
Region Total	\$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	\$1,973.7	\$2,066.1
% Change	5.5%	12.1%	-14.2%	8.8%	9.1%	2.8%	2.3%	1.6%	2.3%	1.3%	4.7%

THE ALLEGHENIES TRAVEL INDUSTRY EMPLOYMENT, 2007 – 2017

County	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Bedford	2,113	2,151	1,977	2,026	2,015	1,967	1,978	2,004	2,042	2,054	2,080
Blair	2,512	2,582	2,446	2,499	2,544	2,554	2,609	2,588	2,665	2,757	2,796
Cambria	2,155	2,109	2,021	2,005	2,021	2,064	2,053	2,042	2,025	2,061	2,047
Centre	4,657	4,782	4,641	4,705	4,765	4,835	4,923	4,875	4,935	5,005	5,049
Fulton	152	154	143	152	152	154	155	156	158	161	167
Huntingdon	1,224	1,244	1,221	1,273	1,308	1,292	1,329	1,335	1,356	1,394	1,421
Juniata	247	251	239	218	219	222	223	224	226	232	232
Mifflin	599	610	567	583	589	598	605	608	618	641	651
Region Total	13,658	13,883	13,254	13,460	13,614	13,687	13,876	13,833	14,024	14,307	14,443
% Change	1.3%	1.6%	-4.5%	1.6%	1.1%	0.5%	1.4%	-0.3%	1.4%	2.0%	0.9%

The Alleghenies – Traveler Spending by Category

THE ALLEGHENIES TRAVELER SPENDING BY CATEGORY, 2016 and 2017 (dollar amounts in millions)

2017	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Bedford	\$44.6	\$60.4	\$44.9	\$48.5	\$99.1	\$297.4
Blair	35.6	75.0	58.5	57.0	131.8	358.0
Cambria	24.9	62.4	48.9	50.9	128.6	315.8
Centre	139.3	180.9	132.4	122.3	219.3	794.2
Fulton	2.3	5.4	4.2	4.7	8.1	24.7
Huntingdon	15.0	39.0	28.1	33.8	57.0	173.0
Juniata	1.4	8.5	6.3	7.7	12.8	36.7
Mifflin	5.2	17.9	11.7	9.7	21.9	66.4
Region Total	\$268.4	\$449.6	\$334.8	\$334.5	\$678.7	\$2,066.1
% Change	4.2%	4.8%	3.9%	5.5%	4.8%	4.7%

2016	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Bedford	\$43.7	\$57.7	\$44.2	\$46.5	\$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	112.8	209.0	748.4
Fulton	2.2	5.0	4.1	4.5	7.7	23.5
Huntingdon	14.7	37.5	27.5	32.0	54.8	166.5
Juniata	1.7	8.4	6.3	7.8	12.6	36.7
Mifflin	5.5	17.3	11.8	9.3	21.4	65.3
Region Total	\$257.6	\$429.1	\$322.4	\$317.1	\$647.5	\$1,973.7

The Alleghenies – Tourism Satellite Account

THE ALLEGHENIES TOURISM SATELLITE ACCOUNT CATEGORIES, 2016 and 2017 (dollar amounts in millions)				
	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
2017				
Bedford	\$297.4	\$0.6	\$12.7	\$310.7
Blair	358.0	0.8	15.2	374.1
Cambria	315.8	0.8	13.4	330.0
Centre	794.2	2.4	33.8	830.3
Fulton	24.7	0.0	1.0	25.7
Huntingdon	173.0	0.3	7.4	180.7
Juniata	36.7	0.0	1.6	38.3
Mifflin	66.4	0.2	2.8	69.4
Region Total	\$2,066.1	\$5.1	\$87.9	\$2,159.1
% Change	4.7%	0.1%	0.3%	4.5%
2016				
Bedford	\$287.3	\$0.6	\$12.8	\$300.6
Blair	335.2	0.8	14.9	350.9
Cambria	310.9	0.8	13.8	325.5
Centre	748.4	2.4	33.2	784.0
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	65.3	0.2	2.9	68.4
Region Total	\$1,973.7	\$5.1	\$87.7	\$2,066.5

*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, 2016 & 2017

THE ALLEGHENIES TRAVEL INDUSTRY IMPACTS, 2016 and 2017 (dollar amounts in millions)

2017	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Bedford	\$297.4	2,080	\$59.3	\$15.3	\$13.7
Blair	358.0	2,796	84.3	19.7	18.2
Cambria	315.8	2,047	72.5	17.2	15.8
Centre	794.2	5,049	157.7	41.5	36.4
Fulton	24.7	167	4.0	1.1	1.0
Huntingdon	173.0	1,421	37.3	9.1	8.3
Juniata	36.7	232	5.4	1.7	1.4
Mifflin	66.4	651	15.5	3.6	3.3
Region Total	\$2,066.1	14,443	\$436.0	\$109.2	\$98.1
% Change	4.7%	0.9%	5.9%	3.1%	2.3%

2016	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Bedford	\$287.3	2,054	\$56.9	\$15.0	\$13.5
Blair	335.2	2,757	77.9	18.7	17.3
Cambria	310.9	2,061	68.4	16.9	15.6
Centre	748.4	5,005	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	232	5.1	1.7	1.4
Mifflin	65.3	641	14.6	3.8	3.4
Region Total	\$1,973.7	14,307	\$411.7	\$106.0	\$95.8

The Alleghenies –Travel Economy Impacts, 2016 & 2017

THE ALLEGHENIES TRAVEL ECONOMY IMPACTS, 2016 and 2017 (dollar amounts in millions)

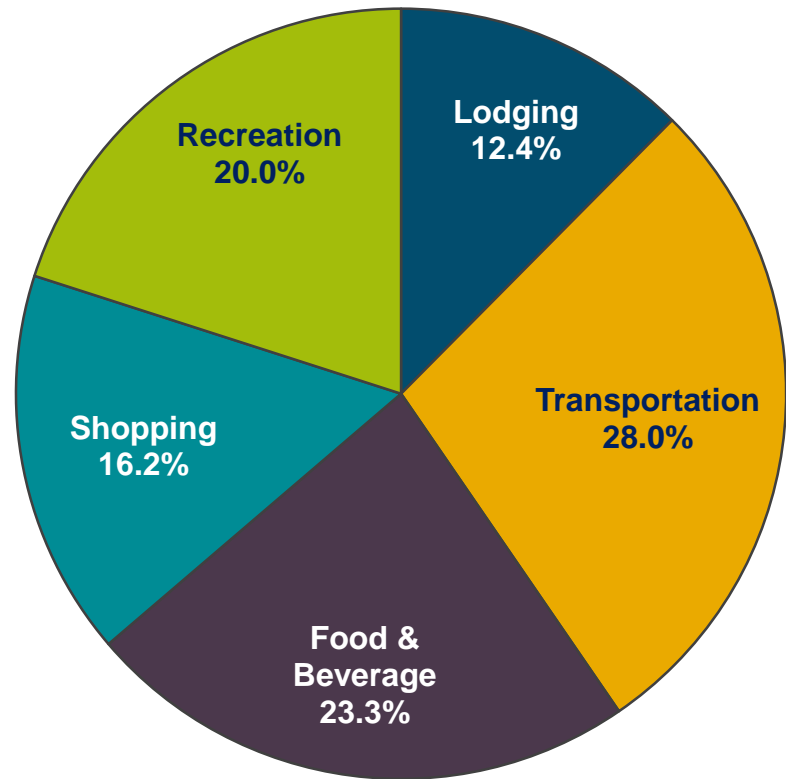
2017	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Bedford	\$310.7	3,053	\$111.0	\$26.9	\$27.5
Blair	374.1	4,389	156.8	34.6	36.6
Cambria	330.0	3,511	134.3	30.2	31.8
Centre	830.3	7,650	300.1	72.3	73.2
Fulton	25.7	299	7.5	2.0	2.0
Huntingdon	180.7	2,169	71.0	16.0	16.7
Juniata	38.3	475	10.1	3.0	2.9
Mifflin	69.4	1,126	29.5	6.4	6.7
Region Total	\$2,159.1	22,674	\$820.3	\$191.3	\$197.5
% Change	4.5%	-0.1%	2.0%	3.2%	2.3%

2016	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Bedford	\$300.6	3,057	\$110.4	\$26.3	\$27.2
Blair	350.9	4,374	151.7	32.7	34.9
Cambria	325.5	3,575	132.8	29.7	31.3
Centre	784.0	7,649	293.7	69.5	71.3
Fulton	24.6	296	7.3	2.0	2.0
Huntingdon	174.2	2,150	69.4	15.6	16.4
Juniata	38.4	475	9.9	3.0	2.9
Mifflin	68.4	1,121	28.7	6.7	6.9
Region Total	\$2,066.5	22,698	\$803.9	\$185.4	\$192.9

Valleys of the Susquehanna

- The Valleys of the Susquehanna region is comprised of the following counties: Columbia, Montour, Northumberland, Snyder, and Union.
- Travelers spent \$665 million in the region in 2017 – a 6.1% increase from 2016 and new record high.
- 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. The region also had the fourth highest share spent on recreation in 2017.

Valleys of the Susquehanna Region 2017 Spending by Category

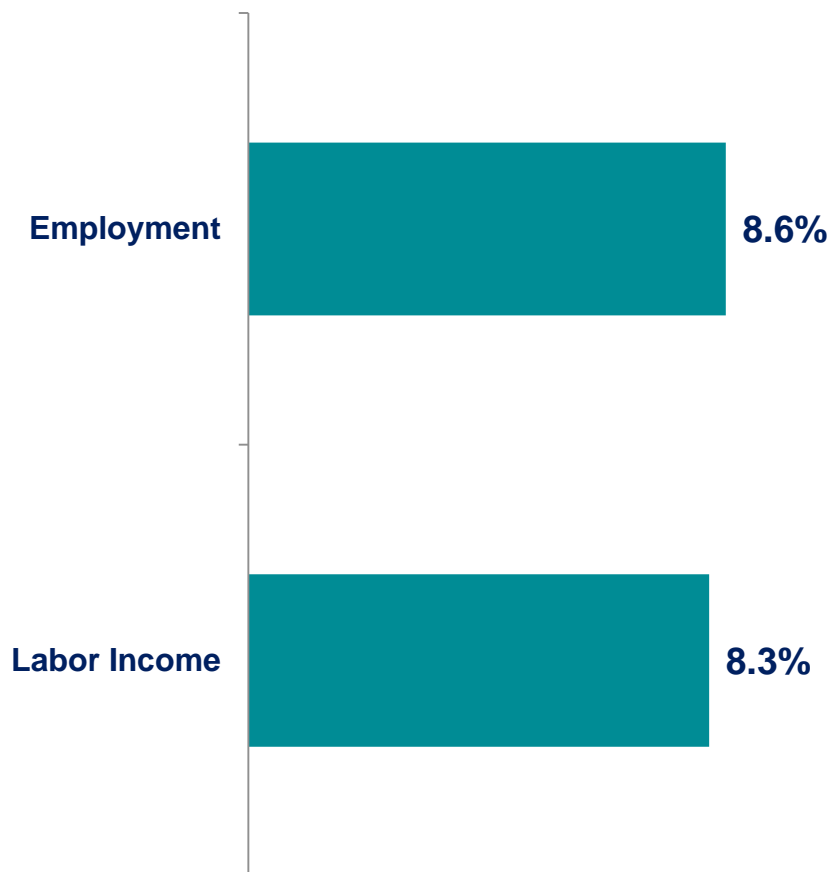


Source: Tourism Economics

Valleys of the Susquehanna

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- The travel industry was responsible for 8.3% of the region's labor income and 8.6% of the region's employment in 2017.
- 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 in 2017.

Travel Industry Share of Regional Economy



Valleys of the Susquehanna – Traveler Spending & Employment Timelines

VALLEYS OF THE SUSQUEHANNA TRAVELER SPENDING, 2007 – 2017 (dollar amounts in millions)

County	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Columbia	\$125.5	\$140.3	\$114.5	\$127.6	\$150.5	\$150.6	\$153.7	\$153.8	\$151.9	\$154.2	\$167.7
Montour	84.9	93.5	79.2	88.0	97.3	105.3	102.3	97.2	96.1	94.4	97.9
Northumberland	102.9	114.4	99.1	113.3	118.3	118.3	124.3	125.0	129.8	133.0	138.1
Snyder	84.3	90.3	74.9	83.5	90.6	90.2	95.3	98.8	99.3	103.5	111.6
Union	118.0	136.7	115.7	124.3	147.8	157.5	149.2	142.7	142.6	142.0	150.0
Region Total	\$515.6	\$575.2	\$483.3	\$536.6	\$604.6	\$622.0	\$624.7	\$617.5	\$619.8	\$627.0	\$665.4
% Change	3.9%	11.6%	-16.0%	11.0%	12.7%	2.9%	0.4%	-1.2%	0.4%	1.1%	6.1%

VALLEYS OF THE SUSQUEHANNA TRAVEL INDUSTRY EMPLOYMENT, 2007 – 2017

County	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Columbia	1,147	1,163	1,141	1,171	1,217	1,258	1,291	1,290	1,292	1,302	1,339
Montour	863	850	800	823	839	863	884	889	902	926	937
Northumberland	980	997	943	988	1,013	1,050	1,066	1,078	1,101	1,107	1,128
Snyder	690	702	665	691	702	722	740	744	764	776	790
Union	1,098	1,116	1,098	1,126	1,152	1,188	1,224	1,229	1,216	1,245	1,271
Region Total	4,777	4,828	4,647	4,799	4,924	5,081	5,205	5,229	5,275	5,355	5,465
% Change	1.4%	1.1%	-3.7%	3.3%	2.6%	3.2%	2.4%	0.5%	0.9%	1.5%	2.0%

Valleys of the Susquehanna – Traveler Spending by Category

VALLEYS OF THE SUSQUEHANNA TRAVELER SPENDING BY CATEGORY, 2016 and 2017 (dollar amounts in millions)

2017	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Columbia	\$23.4	\$41.8	\$26.6	\$29.4	\$46.6	\$167.7
Montour	15.4	21.5	15.4	18.9	26.8	97.9
Northumberland	4.5	25.1	17.0	42.3	49.2	138.1
Snyder	14.7	27.0	21.3	22.3	26.4	111.6
Union	24.8	39.7	27.6	20.6	37.3	150.0
Region Total	\$82.7	\$155.1	\$107.9	\$133.4	\$186.3	\$665.4
% Change	9.2%	6.5%	4.2%	4.4%	6.9%	6.1%

2016	Lodging	Food & Beverage	Shopping	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	42.2	45.7	133.0
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	\$75.7	\$145.6	\$103.6	\$127.8	\$174.3	\$627.0

Valleys of the Susquehanna – Tourism Satellite Account

VALLEYS OF THE SUSQUEHANNA TOURISM SATELLITE ACCOUNT CATEGORIES, 2016 and 2017 (dollar amounts in millions)

2017	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Columbia	\$167.7	\$0.4	\$7.1	\$175.3
Montour	97.9	0.3	4.2	102.4
Northumberland	138.1	0.1	5.9	144.1
Snyder	111.6	0.3	4.7	116.7
Union	150.0	0.5	6.4	156.9
Region Total	\$665.4	\$1.6	\$28.3	\$695.4
% Change	6.1%	0.4%	1.7%	5.9%

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	133.0	0.1	5.9	139.0
Snyder	103.5	0.3	4.6	108.3
Union	142.0	0.5	6.3	148.8
Region Total	\$627.0	\$1.6	\$27.8	\$656.4

*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, 2016 & 2017

VALLEYS OF THE SUSQUEHANNA TRAVEL INDUSTRY IMPACTS, 2016 and 2017 (dollar amounts in millions)

2017	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Columbia	\$167.7	1,339	\$33.4	\$8.7	\$7.7
Montour	97.9	937	23.9	5.5	5.1
Northumberland	138.1	1,128	33.4	7.5	7.1
Snyder	111.6	790	18.1	5.4	4.6
Union	150.0	1,271	32.2	8.1	7.2
Region Total	\$665.4	5,465	\$141.0	\$35.2	\$31.7
% Change	6.1%	2.0%	5.5%	4.0%	2.8%

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	133.0	1,107	31.3	7.2	6.9
Snyder	103.5	776	16.8	5.1	4.4
Union	142.0	1,245	31.3	7.9	7.1
Region Total	\$627.0	5,355	\$133.6	\$33.9	\$30.8

Valleys of the Susquehanna – Travel Economy Impacts, 2016 & 2017

VALLEYS OF THE SUSQUEHANNA TRAVEL ECONOMY IMPACTS, 2016 and 2017 (dollar amounts in millions)

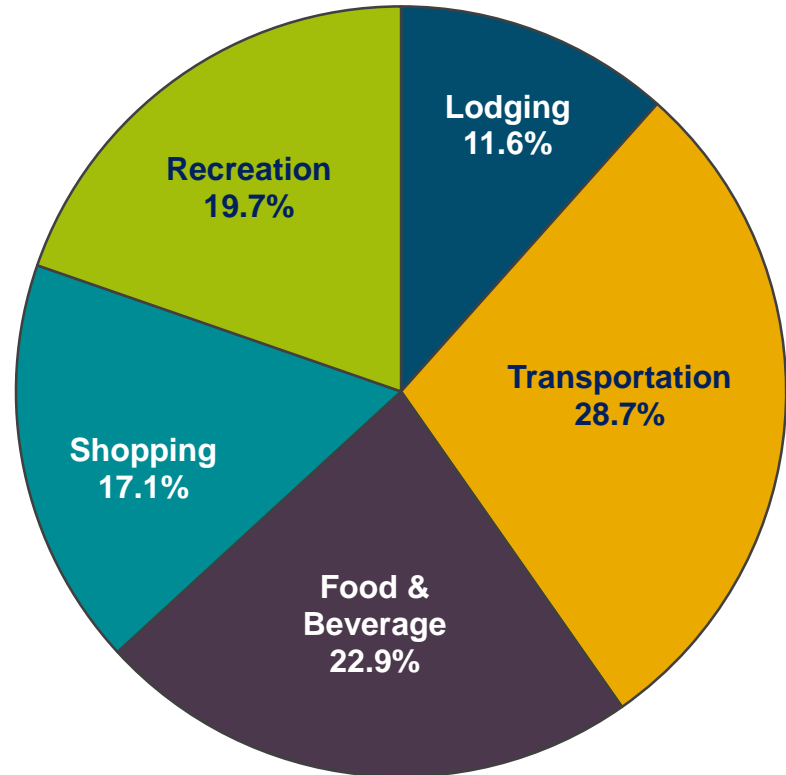
2017	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Columbia	\$175.3	2,135	\$62.4	\$15.2	\$15.5
Montour	102.4	1,355	44.8	9.7	10.2
Northumberland	144.1	1,989	62.8	13.3	14.4
Snyder	116.7	1,287	34.9	9.4	9.2
Union	156.9	1,959	60.9	14.1	14.5
Region Total	\$695.4	8,724	\$265.8	\$61.7	\$63.8
% Change	5.9%	0.7%	1.7%	4.1%	2.8%

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	139.0	1,984	61.0	12.9	14.0
Snyder	108.3	1,275	33.5	8.9	8.8
Union	148.8	1,937	61.5	13.7	14.3
Region Total	\$656.4	8,662	\$261.3	\$59.3	\$62.0

Upstate PA

- The Upstate PA region is comprised of the following counties: Bradford, Lackawanna, Luzerne, Schuylkill, Sullivan, Susquehanna, and Wyoming.
- Travelers spent close to \$2.3 billion in the Upstate PA region in 2017 – a 6.1% increase that more than offset the small decreases of the prior two years and reflecting a new record high.
- 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 2017, but ranked 8th in the share of travel dollars spent on lodging.

Upstate PA Region 2017 Spending by Category

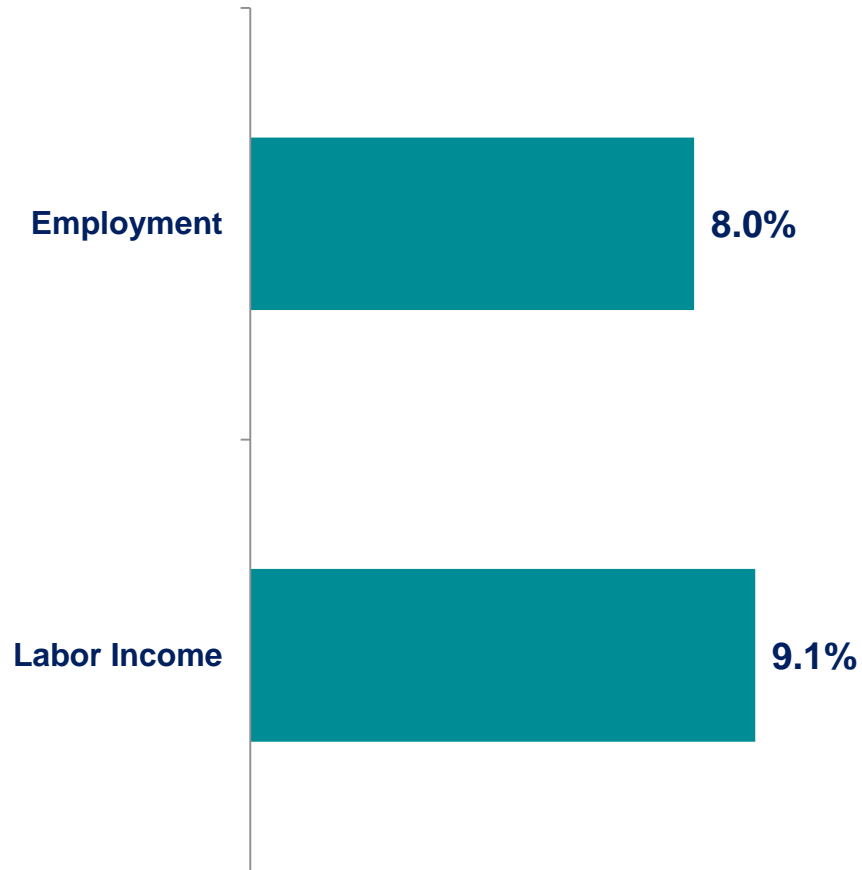


Source: Tourism Economics

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.
- At 8.0%, the travel and tourism 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 in 2017.
- The travel-related labor income share for the Upstate PA region was 9.1% in 2017 and, as in prior years, 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, 2007 – 2017 (dollar amounts in millions)

County	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Bradford	\$134.7	\$148.3	\$136.3	\$170.0	\$200.5	\$225.3	\$223.1	\$227.6	\$211.8	\$195.9	\$206.1
Lackawanna	514.4	566.5	483.1	536.5	615.5	632.1	648.4	633.3	618.4	605.7	649.9
Luzerne	752.5	818.6	708.3	795.5	870.3	870.2	859.9	875.1	889.7	913.9	965.3
Schuylkill	177.5	195.2	158.5	159.2	176.8	195.7	196.3	198.9	206.2	206.2	216.5
Sullivan	12.9	14.4	13.1	16.0	18.7	19.7	19.1	18.6	17.6	17.7	20.3
Susquehanna	121.5	140.4	122.7	141.6	151.8	164.3	163.1	161.7	157.1	153.4	157.4
Wyoming	37.0	40.3	36.8	41.3	53.1	61.2	64.1	63.5	61.2	51.6	60.1
Region Total	\$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	\$2,144.3	\$2,275.5
% Change	6.7%	9.9%	-13.8%	12.2%	12.2%	3.9%	0.3%	0.2%	-0.8%	-0.8%	6.1%

UPSTATE PA TRAVEL INDUSTRY EMPLOYMENT, 2007 – 2017

County	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Bradford	1,011	1,031	1,037	1,252	1,326	1,333	1,402	1,410	1,408	1,378	1,395
Lackawanna	4,769	4,855	4,563	4,752	4,882	5,006	5,131	5,183	5,117	5,056	5,182
Luzerne	6,142	6,253	5,978	6,275	6,534	6,619	6,754	7,056	7,068	7,151	7,227
Schuylkill	1,254	1,287	1,187	1,165	1,177	1,203	1,219	1,225	1,221	1,253	1,267
Sullivan	116	118	117	138	148	160	173	174	167	172	175
Susquehanna	1,059	1,044	1,002	1,024	1,061	1,060	1,105	1,110	1,096	1,116	1,129
Wyoming	359	364	365	362	379	400	421	423	417	404	412
Region Total	14,709	14,952	14,250	14,967	15,507	15,781	16,205	16,580	16,494	16,530	16,787
% Change	2.2%	1.7%	-4.7%	5.0%	3.6%	1.8%	2.7%	2.3%	-0.5%	0.2%	1.6%

Upstate PA – Traveler Spending by Category, 2016 & 2017

UPSTATE PA TRAVELER SPENDING BY CATEGORY, 2016 and 2017 (dollar amounts in millions)

2017	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Bradford	\$20.7	\$45.8	\$32.5	\$35.3	\$71.7	\$206.1
Lackawanna	83.4	156.9	128.1	119.6	161.8	649.9
Luzerne	118.7	214.2	155.4	212.1	264.8	965.3
Schuylkill	18.8	53.0	36.2	35.2	73.4	216.5
Sullivan	2.5	3.6	2.8	5.9	5.5	20.3
Susquehanna	10.7	34.6	23.5	30.0	58.6	157.4
Wyoming	8.5	13.1	11.4	9.8	17.1	60.1
Region Total	\$263.5	\$521.1	\$390.0	\$448.0	\$653.0	\$2,275.5
% Change	8.0%	6.2%	4.0%	6.6%	6.3%	6.1%

2016	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Bradford	\$19.4	\$43.4	\$31.5	\$33.2	\$68.5	\$195.9
Lackawanna	75.3	145.6	122.4	110.8	151.5	605.7
Luzerne	112.1	202.7	150.5	200.3	248.2	913.9
Schuylkill	17.9	50.5	35.4	33.1	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	\$420.4	\$614.5	\$2,144.3

Upstate PA – Tourism Satellite Account

UPSTATE PA TOURISM SATELLITE ACCOUNT CATEGORIES, 2016 and 2017 (dollar amounts in millions)				
2017	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Bradford	\$206.1	\$0.4	\$8.8	\$215.3
Lackawanna	649.9	3.2	27.7	680.7
Luzerne	965.3	3.3	41.1	1,009.7
Schuylkill	216.5	0.4	9.2	226.2
Sullivan	20.3	0.0	0.9	21.2
Susquehanna	157.4	0.2	6.7	164.3
Wyoming	60.1	0.2	2.6	62.8
Region Total	\$2,275.5	\$7.8	\$96.8	\$2,380.1
% Change	6.1%	0.3%	1.7%	5.9%

2016	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Bradford	\$195.9	\$0.4	\$8.7	\$205.0
Lackawanna	605.7	3.2	26.9	635.7
Luzerne	913.9	3.3	40.6	957.8
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	160.4
Wyoming	51.6	0.2	2.3	54.1
Region Total	\$2,144.3	\$7.8	\$95.2	\$2,247.3

*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, 2016 & 2017

UPSTATE PA TRAVEL INDUSTRY IMPACTS, 2016 and 2017 (dollar amounts in millions)

2017	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Bradford	\$206.1	1,395	\$37.3	\$10.2	\$9.0
Lackawanna	649.9	5,182	136.6	35.9	30.8
Luzerne	965.3	7,227	247.3	56.0	51.6
Schuylkill	216.5	1,267	45.3	11.3	10.2
Sullivan	20.3	175	3.9	1.0	0.9
Susquehanna	157.4	1,129	26.9	7.6	6.6
Wyoming	60.1	412	11.1	3.1	2.6
Region Total	\$2,275.5	16,787	\$508.4	\$125.0	\$111.7
% Change	6.1%	1.6%	5.6%	3.9%	2.9%

2016	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Bradford	\$195.9	1,378	\$35.1	\$9.8	\$8.7
Lackawanna	605.7	5,056	128.0	34.2	29.6
Luzerne	913.9	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	\$2,144.3	16,530	\$481.4	\$120.3	\$108.6

Upstate PA –Travel Economy Impacts, 2016 & 2017

UPSTATE PA TRAVEL ECONOMY IMPACTS, 2016 and 2017 (dollar amounts in millions)

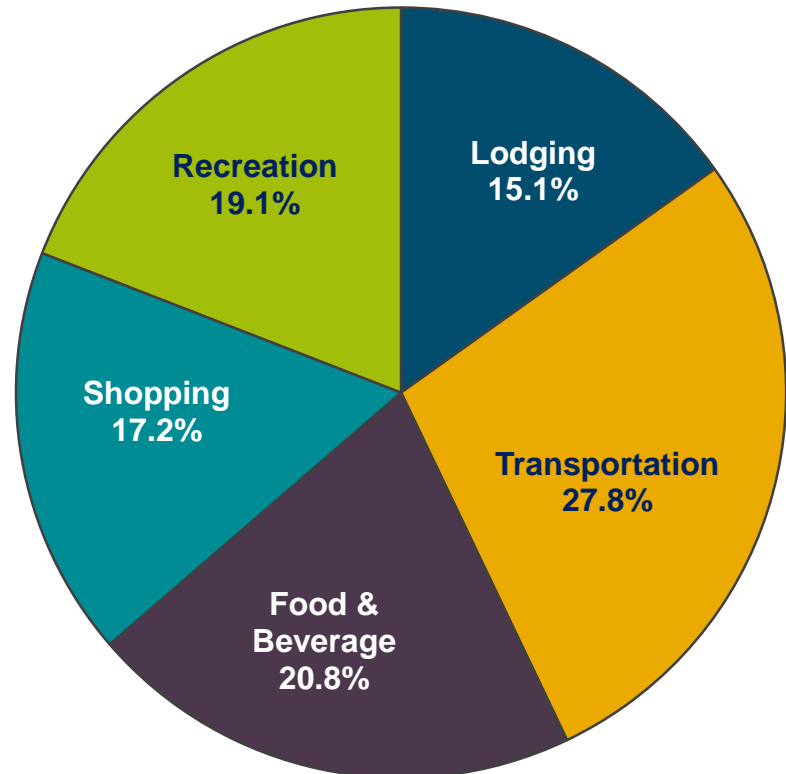
2017	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Bradford	\$215.3	2,170	\$68.3	\$17.9	\$18.0
Lackawanna	680.7	8,065	258.3	61.6	62.0
Luzerne	1,009.7	11,469	472.6	97.7	104.1
Schuylkill	226.2	2,500	85.2	19.9	20.6
Sullivan	21.2	259	6.8	1.8	1.8
Susquehanna	164.3	1,766	49.1	13.3	13.3
Wyoming	62.8	680	20.9	5.3	5.3
Region Total	\$2,380.1	26,908	\$961.1	\$217.6	\$225.1
% Change	5.9%	0.1%	2.2%	4.1%	2.9%

2016	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Bradford	\$205.0	2,197	\$67.9	\$17.3	\$17.5
Lackawanna	635.7	8,020	250.1	58.7	59.6
Luzerne	957.8	11,463	463.5	94.5	102.0
Schuylkill	215.8	2,498	83.8	19.2	20.1
Sullivan	18.5	259	6.8	1.6	1.7
Susquehanna	160.4	1,767	47.9	13.0	13.0
Wyoming	54.1	685	20.4	4.9	5.0
Region Total	\$2,247.3	26,890	\$940.5	\$209.1	\$218.9

Pocono Mountains

- The Pocono Mountains region is comprised of the following counties: Carbon, Monroe, Pike, and Wayne.
- Travelers spent nearly \$3.9 billion in the Pocono Mountains region in 2017 – the fourth highest amount among the state’s 11 tourism regions and a new record high. The 9.8% increase from 2016 was the strongest percentage increase of the regions.
- Lodging was an especially important use of travelers’ trip budgets, with the region ranking second among the state’s tourism regions in the percentage of total spending going to lodging. Travelers spent a smaller portion of their trip budgets on food & beverages than most of the other tourism regions, ranking 9th.

Pocono Mountains Region 2017 Spending by Category

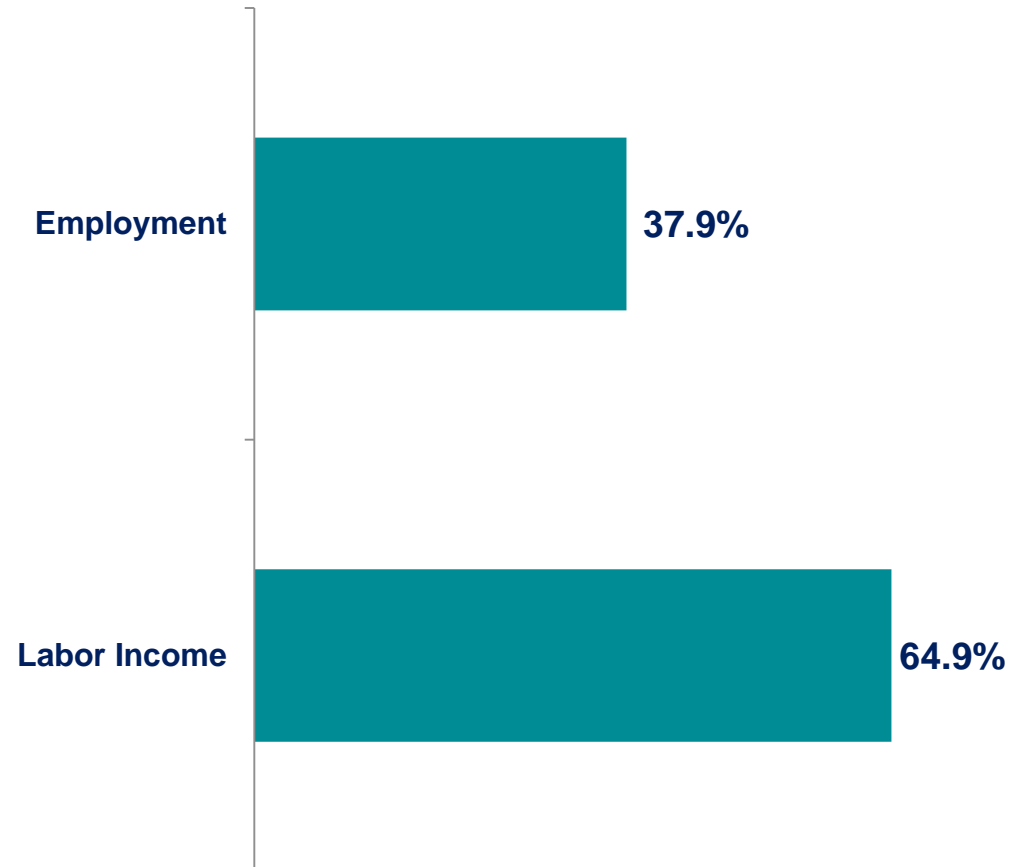


Source: Tourism Economics

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.
- Close to two-thirds of the region's labor income was derived from travel and tourism in 2017, while the employment share rose to 37.9% of the region's economy.
- As in prior years, the Pocono Mountains region continued to have the highest proportion of labor income and employment supported by travel and at rates well above those of the state's other tourism regions.

Travel Industry Share of Regional Economy



Pocono Mountains – Traveler Spending & Employment Timelines

POCONO MOUNTAINS TRAVELER SPENDING, 2007 – 2017 (dollar amounts in millions)

County	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Carbon	\$303.3	\$320.2	\$294.5	\$314.7	\$332.4	\$343.7	\$345.4	\$344.8	\$366.3	393.8	426.5
Monroe	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	2,034.2	2,300.5
Pike	559.6	616.5	520.7	538.0	553.5	575.1	606.0	607.0	636.6	663.5	691.9
Wayne	409.3	437.6	400.4	422.4	432.7	429.5	424.2	419.7	433.1	443.7	462.3
Region Total	\$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	3,535.2	3,881.2
% Change	6.2%	10.7%	-14.9%	7.3%	3.4%	3.0%	0.5%	0.2%	8.3%	9.6%	9.8%

POCONO MOUNTAINS TRAVEL INDUSTRY EMPLOYMENT, 2007 – 2017

County	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Carbon	2,816	2,792	2,766	2,717	2,733	2,638	2,693	2,722	2,759	2,897	2,947
Monroe	13,719	13,777	12,780	12,937	13,011	12,847	12,912	12,890	13,411	14,048	14,488
Pike	5,758	5,715	5,257	4,856	4,852	4,760	4,853	4,922	5,084	5,228	5,322
Wayne	3,157	3,212	3,151	3,107	3,120	3,143	3,120	3,049	3,103	3,198	3,253
Region Total	25,451	25,496	23,954	23,617	23,717	23,388	23,579	23,582	24,358	25,372	26,011
% Change	2.6%	0.2%	-6.0%	-1.4%	0.4%	-1.4%	0.8%	0.0%	3.3%	4.2%	2.5%

Pocono Mountains – Traveler Spending by Category

POCONO MOUNTAINS TRAVELER SPENDING BY CATEGORY, 2016 and 2017 (dollar amounts in millions)

2017	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Carbon	\$54.2	\$87.0	\$60.3	\$89.2	\$135.9	\$426.5
Monroe	397.8	468.8	427.1	451.6	555.2	2,300.5
Pike	87.8	148.9	108.5	115.6	231.1	691.9
Wayne	48.0	100.8	73.0	84.9	155.5	462.3
Region Total	\$587.8	805.5	\$669.0	\$741.3	\$1,077.6	\$3,881.2
% Change	15.4%	10.6%	7.4%	9.9%	7.7%	9.8%

2016	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Carbon	\$48.0	\$79.6	\$56.5	\$81.2	\$128.5	\$393.8
Monroe	329.1	409.1	388.0	401.3	506.6	2,034.2
Pike	85.5	143.0	106.7	110.8	217.4	663.5
Wayne	46.5	96.5	71.5	80.8	148.4	443.7
Region Total	\$509.2	\$728.2	\$622.6	\$674.2	\$1,000.9	\$3,535.2

Pocono Mountains – Tourism Satellite Account

POCONO MOUNTAINS TOURISM SATELLITE ACCOUNT CATEGORIES, 2016 and 2017 (dollar amounts in millions)

2017	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Carbon	426.5	\$0.9	\$18.2	\$445.6
Monroe	2,300.5	7.1	97.9	2,405.5
Pike	691.9	1.6	29.4	723.0
Wayne	462.3	0.7	19.7	482.6
Region Total	3,881.2	\$10.3	\$165.2	\$4,056.7
% Change	9.8%	1.1%	5.2%	9.6%

2016	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Carbon	393.8	\$0.9	\$17.5	\$412.2
Monroe	2,034.2	7.0	90.3	2,131.5
Pike	663.5	1.6	29.5	694.6
Wayne	443.7	0.7	19.7	464.1
Region Total	3,535.2	\$10.2	\$157.0	\$3,702.4

*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, 2016 & 2017

POCONO MOUNTAINS TRAVEL INDUSTRY IMPACTS, 2016 and 2017 (dollar amounts in millions)

2017	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Carbon	426.5	2,947	\$73.3	\$20.9	\$18.0
Monroe	2,300.5	14,488	505.5	124.8	111.9
Pike	691.9	5,322	188.8	40.4	38.5
Wayne	462.3	3,253	106.0	24.8	23.1
Region Total	3,881.2	26,011	\$873.7	\$210.9	\$191.5
% Change	9.8%	2.5%	7.5%	6.7%	5.3%

2016	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Carbon	393.8	2,897	\$70.2	\$19.8	\$17.5
Monroe	2,034.2	14,048	464.6	114.5	104.2
Pike	663.5	5,228	177.6	39.1	37.5
Wayne	443.7	3,198	100.6	24.1	22.6
Region Total	3,535.2	25,372	\$813.0	\$197.6	\$181.8

Pocono Mountains – Travel Economy Impacts, 2016 & 2017

POCONO MOUNTAINS TRAVEL ECONOMY IMPACTS, 2016 and 2017 (dollar amounts in millions)

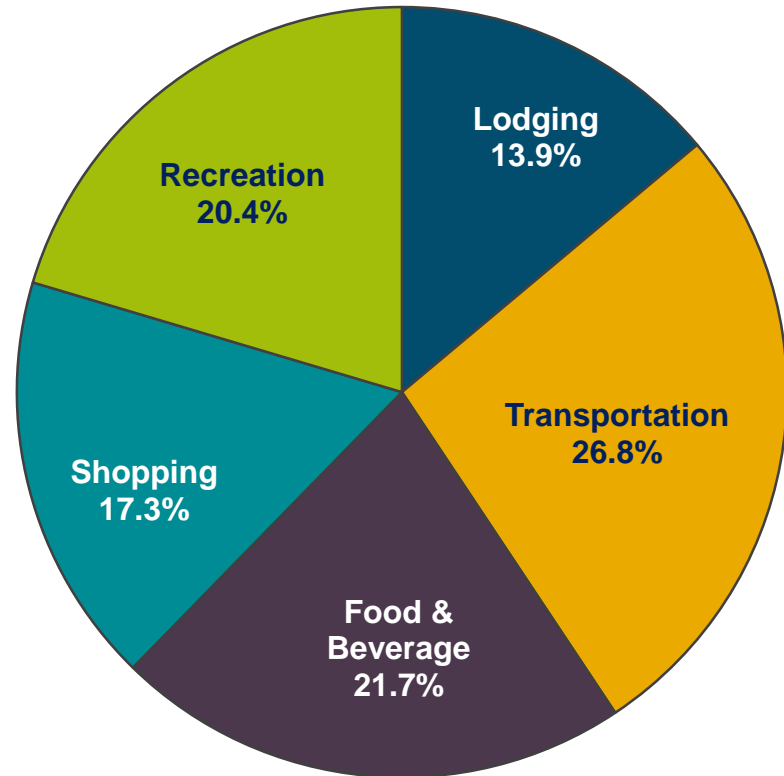
2017	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Carbon	\$445.6	4,360	\$138.6	\$36.5	\$36.3
Monroe	2,405.5	20,630	941.4	217.8	225.3
Pike	723.0	7,486	358.8	71.2	77.7
Wayne	482.6	4,784	200.6	43.8	46.5
Region Total	\$4,056.7	37,259	\$1,639.4	\$369.3	\$385.8
% Change	9.6%	1.7%	4.0%	6.9%	5.3%

2016	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Carbon	\$412.2	4,299	\$136.0	\$34.7	\$35.1
Monroe	2,131.5	20,167	896.0	199.4	209.9
Pike	694.6	7,421	347.8	68.8	75.7
Wayne	464.1	4,746	196.3	42.5	45.6
Region Total	\$3,702.4	36,633	\$1,576.2	\$345.4	\$366.3

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 well over \$8.7 billion in the Dutch Country Roads region in 2017 – the second highest amount of the state’s tourism regions, a 4.4% increase from 2016, and new record high. The region posted the largest dollar increase in traveler spending among the regions.
- Lodging, shopping, and recreation were all important to the region’s travelers with the region ranking third among the state’s tourism regions in the share of travel budgets going to these three spending categories in 2017. In contrast, the region ranked 10th in the amount of trip budgets allocated to transportation.

Dutch Country Roads Region 2017 Spending by Category

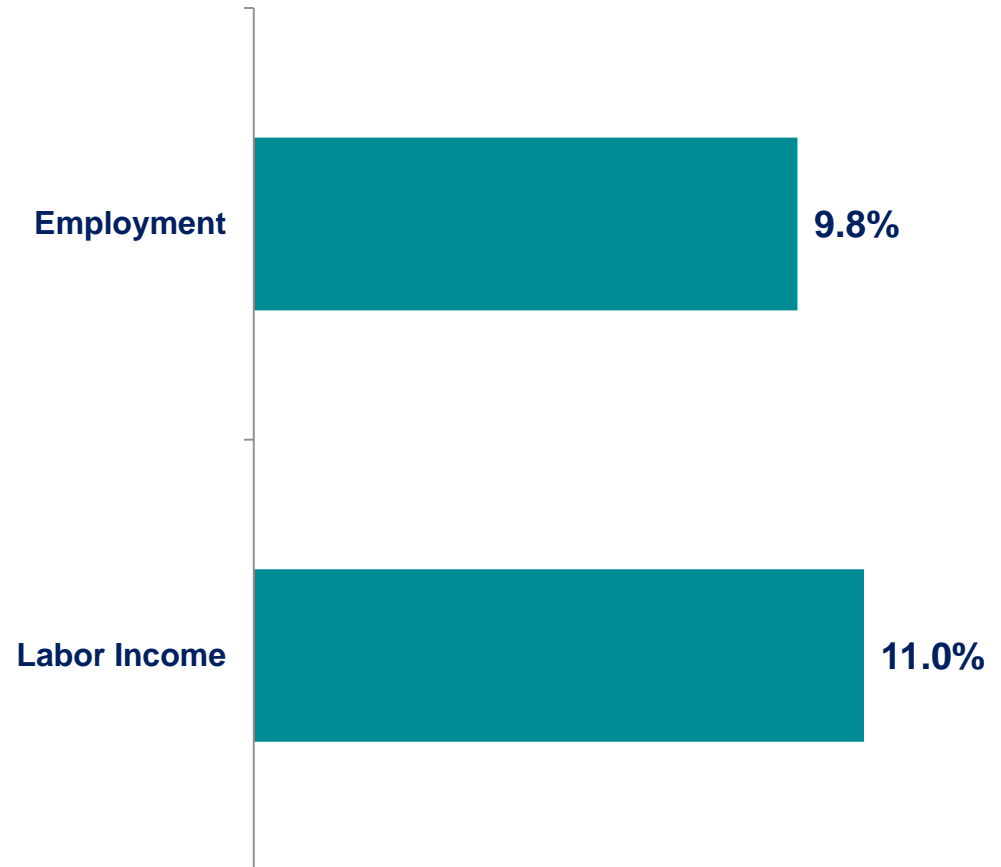


Source: Tourism Economics

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 2017. The region ranked 4th in terms of the industry's share of regional employment.
- The proportion of labor income attributed to the region's travel and tourism industry rose to 11.0% in 2017 – the 5th highest of PA's 11 tourism regions, while the employment share grew slightly to 9.8%.

Travel Industry Share of Regional Economy



Dutch Country Roads – Traveler Spending & Employment Timelines

DUTCH COUNTRY ROADS TRAVELER SPENDING, 2007 – 2017 (dollar amounts in millions)

County	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Adams	\$535.1	\$602.8	\$520.9	\$555.8	\$608.0	\$628.8	\$671.8	\$666.0	\$686.7	\$691.0	725.9
Berks	668.1	746.9	623.7	687.7	762.7	794.8	807.3	795.8	824.4	855.7	901.9
Cumberland	674.9	774.2	628.3	677.8	726.7	749.8	760.3	774.0	816.6	838.5	881.8
Dauphin	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	2,356.7	2,459.6
Franklin	280.8	322.2	270.2	286.5	298.0	314.8	323.4	324.3	326.7	317.6	327.5
Lancaster	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	2,065.4	2,138.4
Lebanon	158.9	182.2	159.9	170.9	185.6	192.6	193.9	200.9	201.4	205.4	217.8
Perry	44.2	48.6	40.6	43.6	48.7	46.8	46.9	47.4	47.9	48.3	49.6
York	764.3	829.2	706.5	753.5	850.2	885.1	907.5	923.0	943.7	973.4	1,016.3
Region Total	\$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	\$8,352.0	\$8,718.8
% Change	3.5%	13.3%	-13.6%	8.0%	8.0%	3.2%	2.7%	1.4%	2.4%	2.4%	4.4%

DUTCH COUNTRY ROADS TRAVEL INDUSTRY EMPLOYMENT, 2007 – 2017

County	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Adams	4,972	5,063	4,835	4,771	4,788	4,866	5,080	5,074	5,105	5,199	5,272
Berks	6,401	6,490	6,067	6,173	6,238	6,468	6,577	6,564	6,622	6,828	6,901
Cumberland	6,327	6,408	5,909	5,812	5,935	6,068	6,152	6,215	6,239	6,304	6,442
Dauphin	18,141	18,282	17,583	17,735	17,887	18,533	18,724	18,709	18,846	19,032	19,368
Franklin	2,462	2,473	2,298	2,276	2,288	2,352	2,438	2,438	2,444	2,513	2,533
Lancaster	14,696	14,766	14,381	14,640	14,753	15,239	15,478	15,731	15,853	16,310	16,554
Lebanon	1,636	1,627	1,544	1,534	1,562	1,609	1,654	1,667	1,655	1,694	1,714
Perry	304	309	296	302	310	321	327	328	340	348	346
York	7,741	7,656	7,213	7,038	7,165	7,421	7,525	7,637	7,709	7,914	8,010
Region Total	62,680	63,074	60,127	60,281	60,927	62,877	63,955	64,363	64,814	66,142	67,141
% Change	1.8%	0.6%	-4.7%	0.3%	1.1%	3.2%	1.7%	0.6%	0.7%	2.0%	1.5%

Dutch Country Roads – Traveler Spending by Category

DUTCH COUNTRY ROADS TRAVELER SPENDING BY CATEGORY, 2016 and 2017 (dollar amounts in millions)

2017	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Adams	\$97.6	\$148.4	\$130.1	\$174.6	\$175.2	725.9
Berks	99.6	207.3	162.9	161.6	270.5	901.9
Cumberland	130.7	210.3	147.6	152.1	241.1	881.8
Dauphin	400.4	478.2	370.1	597.7	613.3	2,459.6
Franklin	36.5	78.5	55.0	62.9	94.7	327.5
Lancaster	306.2	459.1	409.6	402.7	560.8	2,138.4
Lebanon	19.8	54.3	43.8	38.3	61.7	217.8
Perry	2.0	12.6	9.3	8.2	17.5	49.6
York	119.2	239.3	178.7	180.9	298.2	1,016.3
Region Total	\$1,212.0	\$1,887.9	\$1,507.0	\$1,779.0	\$2,332.9	\$8,718.8
% Change	4.2%	4.9%	2.5%	5.2%	4.7%	4.4%

2016	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Adams	\$92.9	\$141.1	\$126.8	\$164.8	\$165.5	\$691.0
Berks	92.0	195.6	159.5	150.7	257.9	855.7
Cumberland	124.6	199.3	143.0	142.3	229.2	838.5
Dauphin	386.4	458.1	360.3	571.5	580.4	2,356.7
Franklin	35.6	75.4	54.0	59.4	93.2	317.6
Lancaster	298.8	440.3	402.0	387.2	537.1	2,065.4
Lebanon	17.9	51.1	42.0	36.0	58.4	205.4
Perry	2.1	12.1	8.9	7.9	17.4	48.3
York	112.3	227.0	174.1	171.4	288.6	973.4
Region Total	\$1,162.8	\$1,799.9	\$1,470.6	\$1,691.2	\$2,227.7	\$8,352.0

Dutch Country Roads – Tourism Satellite Account

DUTCH COUNTRY ROADS TOURISM SATELLITE ACCOUNT CATEGORIES, 2016 and 2017 (dollar amounts in millions)				
2017	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Adams	725.9	\$2.8	\$30.9	\$759.6
Berks	901.9	2.9	38.4	943.2
Cumberland	881.8	2.6	37.5	921.9
Dauphin	2,459.6	12.7	104.7	2,577.0
Franklin	327.5	0.8	13.9	342.3
Lancaster	2,138.4	9.3	91.0	2,238.7
Lebanon	217.8	0.5	9.3	227.6
Perry	49.6	0.0	2.1	51.7
York	1,016.3	3.2	43.2	1,062.7
Region Total	\$8,718.8	\$34.9	\$371.0	\$9,124.8
% Change	4.4%	0.0%	0.0%	4.2%

2016	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Adams	\$691.0	\$2.8	\$30.7	\$724.5
Berks	855.7	2.9	38.0	896.6
Cumberland	838.5	2.6	37.2	878.3
Dauphin	2,356.7	12.7	104.7	2,474.1
Franklin	317.6	0.8	14.1	332.5
Lancaster	2,065.4	9.3	91.7	2,166.4
Lebanon	205.4	0.5	9.1	215.1
Perry	48.3	0.0	2.1	50.5
York	973.4	3.2	43.2	1,019.8
Region Total	\$8,352.0	\$34.9	\$370.9	\$8,757.8

*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, 2016 & 2017

DUTCH COUNTRY ROADS TRAVEL INDUSTRY IMPACTS, 2016 and 2017 (dollar amounts in millions)

2017	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Adams	725.9	5,272	\$158.5	\$39.9	\$35.2
Berks	901.9	6,901	212.1	50.4	45.7
Cumberland	881.8	6,442	183.2	46.7	41.5
Dauphin	2,459.6	19,368	689.4	152.4	139.4
Franklin	327.5	2,533	73.7	17.8	16.1
Lancaster	2,138.4	16,554	459.2	117.7	102.5
Lebanon	217.8	1,714	58.1	12.6	12.0
Perry	49.6	346	8.5	2.3	2.1
York	1,016.3	8,010	240.8	56.8	51.7
Region Total	\$8,718.8	67,141	\$2,083.3	\$496.7	\$446.2
% Change	4.4%	1.5%	6.2%	3.2%	2.6%

2016	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Adams	\$691.0	5,199	\$146.7	\$38.3	\$33.9
Berks	855.7	6,828	200.7	48.7	44.6
Cumberland	838.5	6,304	175.1	45.3	40.7
Dauphin	2,356.7	19,032	645.9	147.4	135.3
Franklin	317.6	2,513	68.8	17.3	15.7
Lancaster	2,065.4	16,310	437.3	115.2	101.0
Lebanon	205.4	1,694	54.6	12.1	11.6
Perry	48.3	348	8.0	2.3	2.1
York	973.4	7,914	225.2	54.9	50.2
Region Total	\$8,352.0	66,142	\$1,962.4	\$481.5	\$435.1

Dutch Country Roads – Travel Economy Impacts, 2016 & 2017

DUTCH COUNTRY ROADS TRAVEL ECONOMY IMPACTS, 2016 and 2017 (dollar amounts in millions)

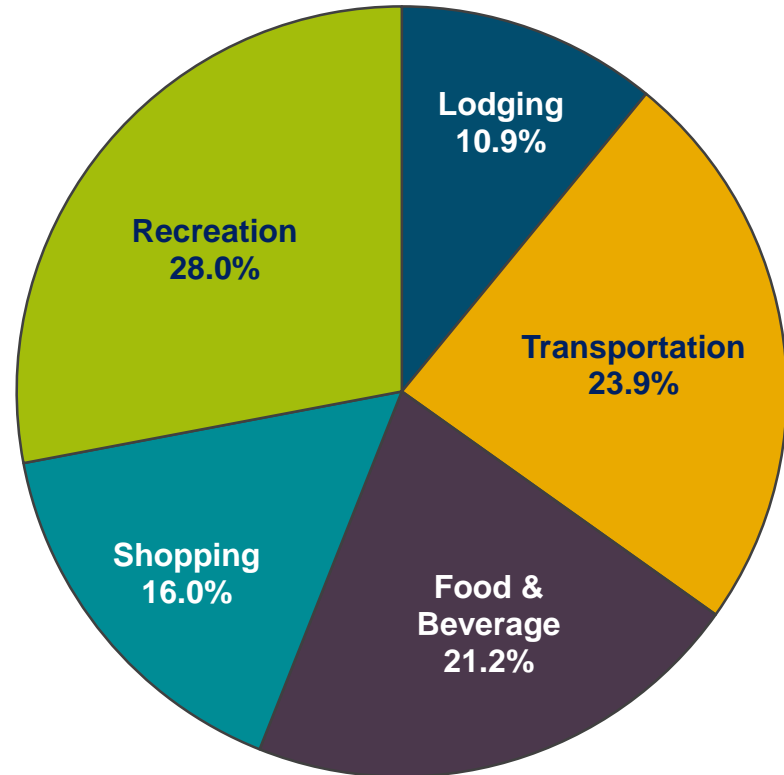
2017	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Adams	\$759.6	7,883	\$298.3	\$69.1	\$70.8
Berks	943.2	11,402	399.9	87.9	92.1
Cumberland	921.9	9,805	345.6	81.6	83.5
Dauphin	2,577.0	27,039	1,293.6	263.2	281.2
Franklin	342.3	4,210	139.0	31.1	32.5
Lancaster	2,238.7	24,902	857.8	203.3	206.5
Lebanon	227.6	3,004	109.5	22.2	24.1
Perry	51.7	740	16.1	4.2	4.2
York	1,062.7	13,031	454.7	99.2	104.3
Region Total	\$9,124.8	102,015	\$3,914.5	\$861.8	\$899.3
% Change	4.2%	0.4%	2.5%	3.3%	2.6%

2016	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Adams	\$724.5	7,858	\$286.9	\$66.3	\$68.2
Berks	896.6	11,369	390.8	84.8	89.8
Cumberland	878.3	9,754	340.9	79.0	81.9
Dauphin	2,474.1	26,922	1,257.1	253.9	272.9
Franklin	332.5	4,208	134.7	30.2	31.7
Lancaster	2,166.4	24,754	844.9	198.6	203.4
Lebanon	215.1	3,001	106.9	21.3	23.4
Perry	50.5	741	15.8	4.1	4.2
York	1,019.8	12,969	439.4	95.7	101.2
Region Total	\$8,757.8	101,575	\$3,817.4	\$833.9	\$876.7

Lehigh Valley

- The Lehigh Valley region is comprised the following counties: Lehigh and Northampton.
- Travelers spent more than \$2.3 billion in the Lehigh Valley region in 2017 – a new record high and a 5.0% increase from 2016.
- With its close proximity to the New York, Philadelphia, and New Jersey markets, a strong day-trip segment, and numerous regional attractions, the Lehigh Valley region once again posted the highest proportion of traveler spending going to recreation among the state's 11 tourism regions, the lowest share going to transportation and the second lowest share going to lodging and shopping in 2017.

Lehigh Valley Region 2017 Spending by Category

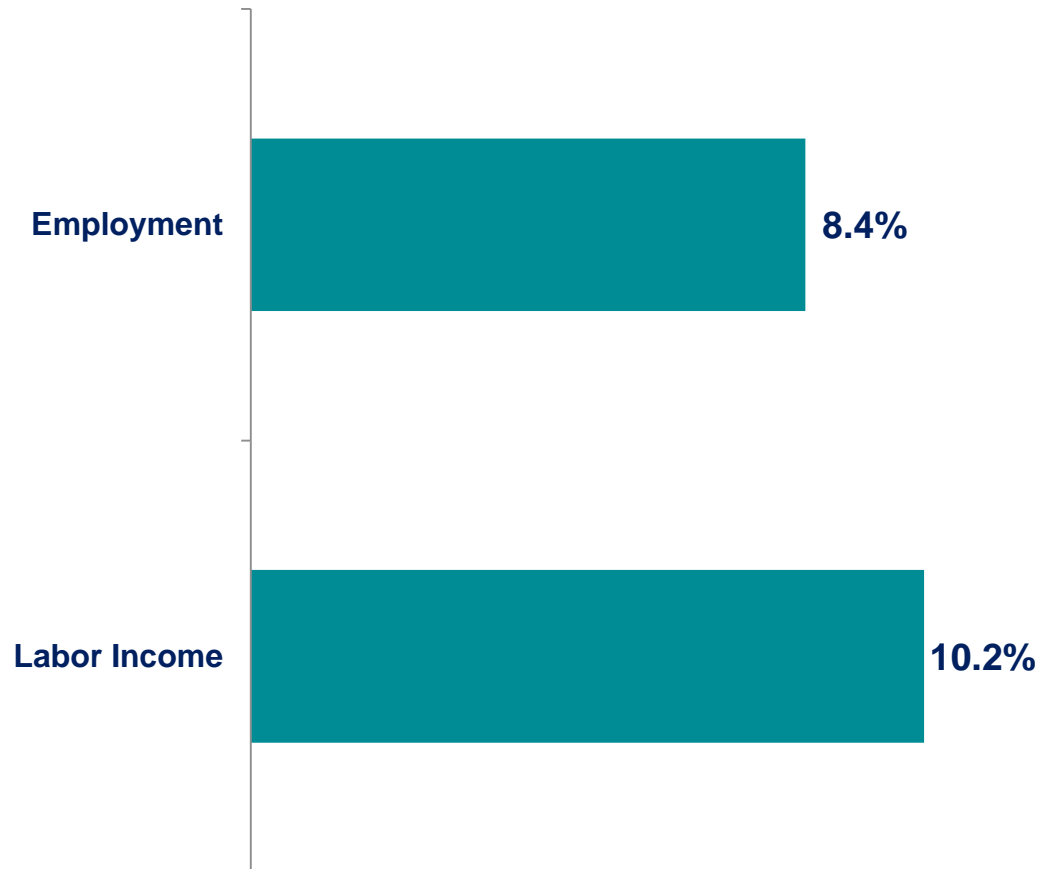


Source: Tourism Economics

Lehigh Valley

- The chart shows the travel economy's share (including indirect and induced impacts) of the region's total for both labor income and employment.
- The travel industry was responsible for 8.4% of the region's employment and 10.2% of labor income in 2017 – both up 0.1 of a percentage point from 2016.
- As in prior years, the region continued to ranked 6th among the state's 11 tourism regions in the actual number of travel-supported jobs and 9th in the industry's share of regional employment in 2017.

Travel Industry Share of Regional Economy



Lehigh Valley – Traveler Spending & Employment Timelines

LEHIGH VALLEY TRAVELER SPENDING, 2007 – 2017 (dollar amounts in millions)

County	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Lehigh	\$952.9	\$1,061.4	\$872.1	\$925.4	\$996.3	\$1,030.7	\$1,041.7	\$1,054.4	\$1,127.8	\$1,169.2	\$1,240.9
Northampton	517.7	581.2	518.3	596.1	761.4	827.0	863.9	921.8	981.5	1,029.0	1,067.3
Region Total	\$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	\$2,198.1	\$2,308.2
% Change	6.2%	11.7%	-15.4%	9.4%	15.5%	5.7%	2.6%	3.7%	6.7%	4.2%	5.0%

LEHIGH VALLEY TRAVEL INDUSTRY EMPLOYMENT, 2007 – 2017

County	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Lehigh	8,242	8,274	7,732	7,555	7,624	7,838	7,970	7,983	8,119	8,358	8,590
Northampton	5,111	5,208	5,074	5,448	5,816	6,180	6,789	6,920	7,127	7,408	7,611
Region Total	13,353	13,482	12,806	13,003	13,440	14,018	14,760	14,903	15,246	15,766	16,201
% Change	1.9%	1.0%	-5.0%	1.5%	3.4%	4.3%	5.3%	1.0%	2.3%	3.4%	2.8%

Lehigh Valley –Traveler Spending by Category

LEHIGH VALLEY TRAVELER SPENDING BY CATEGORY, 2016 and 2017 (dollar amounts in millions)

2017	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Lehigh	\$140.9	\$296.5	\$236.2	\$249.7	\$317.5	\$1,240.9
Northampton	111.6	192.5	133.1	396.0	234.1	1,067.3
Region Total	\$252.5	\$489.0	\$369.3	\$645.8	\$551.6	\$2,308.2
% Change	4.7%	5.5%	3.1%	5.3%	5.7%	5.0%

2016	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Lehigh	\$134.5	\$278.9	\$228.2	\$235.0	\$292.5	\$1,169.2
Northampton	106.7	184.6	130.0	378.3	229.4	1,029.0
Region Total	\$241.2	\$463.5	\$358.2	\$613.4	\$521.9	\$2,198.1

Lehigh Valley – Tourism Satellite Account

LEHIGH VALLEY TOURISM SATELLITE ACCOUNT CATEGORIES, 2016 and 2017 (dollar amounts in millions)

2017	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Lehigh	\$1,240.9	\$3.7	\$52.8	\$1,297.4
Northampton	1,067.3	3.2	45.4	1,115.9
Region Total	\$2,308.2	\$6.8	\$98.2	\$2,413.2
% Change	5.0%	0.1%	0.6%	4.8%

2016	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Lehigh	\$1,169.2	\$3.7	\$51.9	\$1,224.8
Northampton	1,029.0	3.2	45.7	1,077.8
Region Total	\$2,198.1	\$6.8	\$97.6	\$2,302.6

*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, 2016 & 2017

LEHIGH VALLEY TRAVEL INDUSTRY IMPACTS, 2016 and 2017 (dollar amounts in millions)

2017	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Lehigh	\$1,240.9	8,590	\$279.4	\$67.8	\$61.2
Northampton	1,067.3	7,611	332.5	66.9	64.9
Region Total	\$2,308.2	16,201	\$611.9	\$134.7	\$126.1
% Change	5.0%	2.8%	3.7%	2.6%	1.2%

2016	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Lehigh	\$1,169.2	8,358	\$260.9	\$64.9	\$59.0
Northampton	1,029.0	7,408	329.2	66.4	65.6
Region Total	\$2,198.1	15,766	\$590.2	\$131.3	\$124.6

Lehigh Valley –Travel Economy Impacts, 2016 & 2017

LEHIGH VALLEY TRAVEL ECONOMY IMPACTS, 2016 and 2017 (dollar amounts in millions)

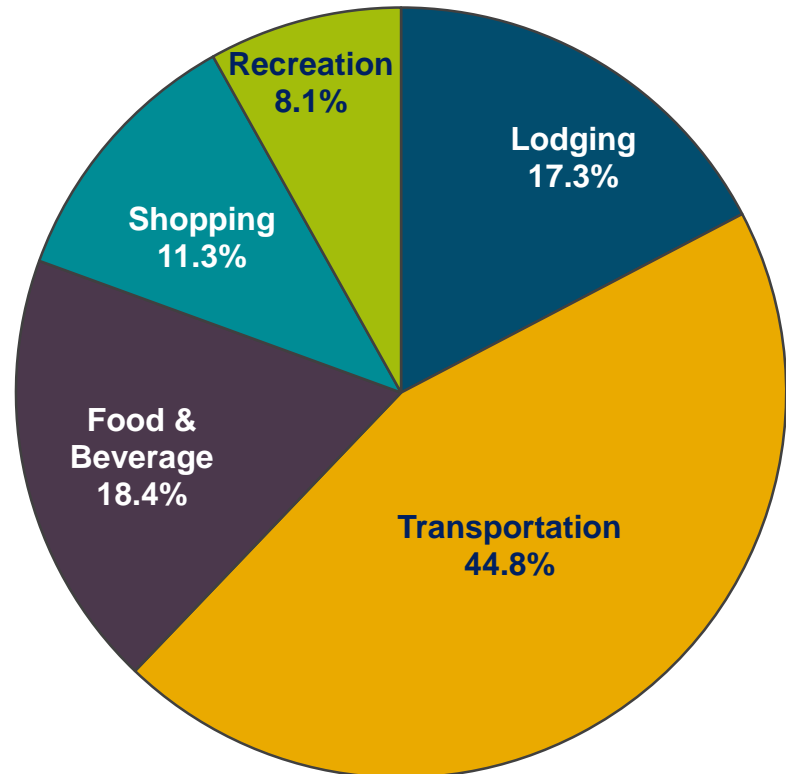
2017	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Lehigh	\$1,297.4	13,378	\$523.7	\$118.5	\$123.4
Northampton	1,115.9	11,760	632.9	117.4	131.1
Region Total	\$2,413.2	25,138	\$1,156.7	\$235.9	\$254.4
% Change	4.8%	1.6%	1.0%	2.7%	1.2%

2016	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Lehigh	\$1,224.8	13,197	\$506.4	\$113.2	\$118.9
Northampton	1,077.8	11,556	638.6	116.6	132.4
Region Total	\$2,302.6	24,752	\$1,145.0	\$229.8	\$251.3

Philadelphia & The Countryside

- Philadelphia and The Countryside region is comprised of the following counties: Bucks, Chester, Delaware, Montgomery, and Philadelphia.
- Travelers spent more than \$10.0 billion in the Philadelphia & The Countryside region in 2017 – a new record high and a 3.3% increase from 2016.
- 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 2017.

Philadelphia & The Countryside Region 2017 Spending by Category

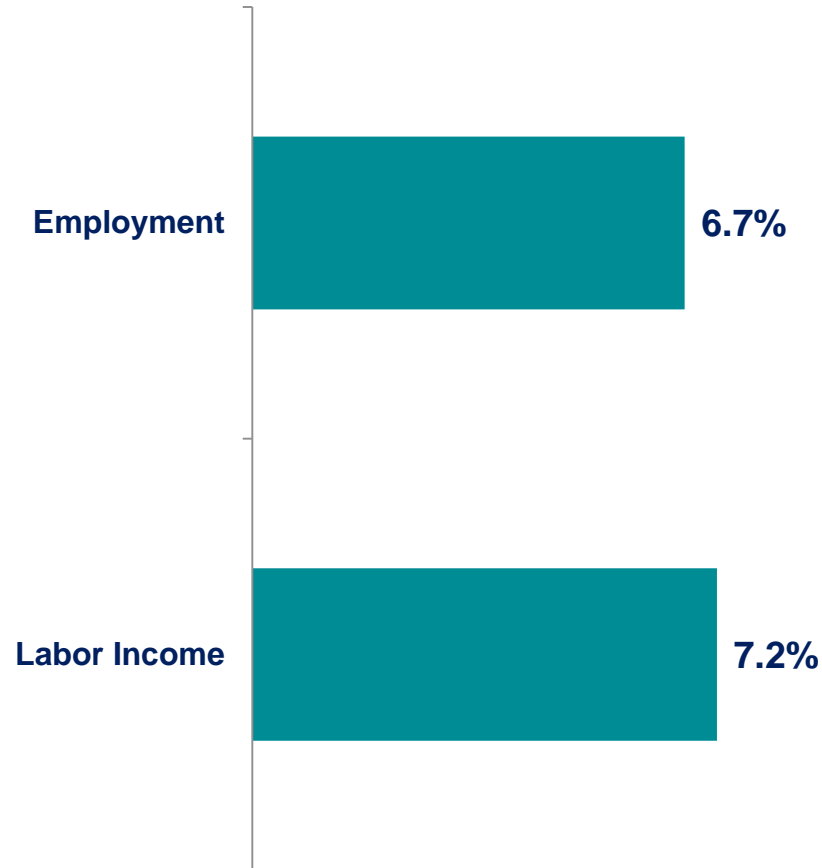


Source: Tourism Economics

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 2017, 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 7.2% in 2017 – a 0.2 percentage point increase from 2016, while the industry's share of the region's employment base was unchanged.

Travel Industry Share of Regional Economy



Philadelphia & The Countryside – Traveler Spending & Employment Timelines

PHILADELPHIA AND THE COUNTRYSIDE TRAVELER SPENDING, 2007 – 2017 (dollar amounts in millions)											
County	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Bucks	\$640.3	\$704.5	\$629.2	\$673.2	\$728.0	\$743.6	\$742.1	\$759.9	\$795.5	\$814.4	\$831.7
Chester	595.5	680.1	608.2	646.7	684.2	713.8	730.4	735.6	760.1	772.5	800.2
Delaware	558.2	613.9	530.4	564.5	654.5	645.8	642.1	655.4	658.6	667.8	692.4
Montgomery	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	1,361.1	1,390.3
Philadelphia	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	6,073.9	6,298.9
Region Total	\$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	\$9,689.8	\$10,013.5
% Change	5.4%	9.8%	-11.7%	6.4%	6.7%	2.1%	2.7%	1.7%	3.0%	3.3%	3.3%

PHILADELPHIA AND THE COUNTRYSIDE TRAVEL INDUSTRY EMPLOYMENT, 2007 – 2017											
County	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Bucks	8,545	8,795	8,482	8,389	8,568	8,717	8,776	8,850	8,999	9,161	9,235
Chester	7,172	7,286	6,983	6,823	6,879	7,052	7,176	7,288	7,397	7,500	7,679
Delaware	6,931	6,936	6,701	6,697	6,936	7,158	7,360	7,486	7,535	7,694	7,850
Montgomery	12,909	12,983	12,380	12,159	12,337	13,008	13,366	13,430	13,618	13,967	14,147
Philadelphia	33,719	33,755	31,929	32,221	32,669	33,628	34,415	34,803	35,577	36,363	37,046
Region Total	69,275	69,755	66,474	66,289	67,390	69,563	71,093	71,857	73,127	74,685	75,958
% Change	2.4%	0.7%	-4.7%	-0.3%	1.7%	3.2%	2.2%	1.1%	1.8%	2.1%	1.7%

Philadelphia & The Countryside – Traveler Spending by Category

PHILADELPHIA AND THE COUNTRYSIDE TRAVELER SPENDING BY CATEGORY, 2016 and 2017 (dollar amounts in millions)

2017	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Bucks	\$143.1	\$186.4	\$119.7	\$90.0	\$292.6	\$831.7
Chester	145.7	180.3	120.8	87.1	266.3	800.2
Delaware	110.5	163.9	99.5	80.4	238.2	692.4
Montgomery	350.0	273.1	173.5	103.7	489.9	1,390.3
Philadelphia	985.5	1,040.7	620.6	451.6	3,200.5	6,298.9
Region Total	\$1,734.9	\$1,844.3	\$1,134.0	\$812.8	\$4,487.5	\$10,013.5
% Change	1.3%	3.8%	0.8%	3.0%	4.7%	3.3%

2016	Lodging	Food & Beverage	Shopping	Recreation	Transportation	Total
Bucks	\$144.7	\$181.4	\$120.4	\$86.7	\$281.1	\$814.4
Chester	144.5	174.0	120.0	82.2	252.0	772.5
Delaware	106.7	157.1	97.4	75.9	230.6	667.8
Montgomery	350.4	264.7	171.5	98.7	475.8	1,361.1
Philadelphia	965.6	1,000.1	615.8	445.6	3,046.9	6,073.9
Region Total	\$1,711.9	\$1,777.3	\$1,125.1	\$789.0	\$4,286.5	\$9,689.8

Philadelphia & The Countryside – Tourism Satellite Account

PHILADELPHIA AND THE COUNTRYSIDE TOURISM SATELLITE ACCOUNT CATEGORIES, 2016 and 2017 (dollar amounts in millions)

2017	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Bucks	\$831.7	\$3.4	\$35.4	\$870.6
Chester	800.2	3.4	34.1	837.7
Delaware	692.4	2.9	29.5	724.8
Montgomery	1,390.3	5.3	59.2	1,454.7
Philadelphia	6,298.9	68.0	268.0	6,635.0
Region Total	\$10,013.5	\$83.1	\$426.1	\$10,522.7
% Change	3.3%	-0.1%	-1.0%	3.1%

2016	Traveler Spending	Government Expenditures	Investment & Non-Travel Personal Consumption Expenditures*	Total Travel Demand
Bucks	\$814.4	\$3.5	\$36.2	\$854.0
Chester	772.5	3.4	34.3	810.3
Delaware	667.8	2.9	29.7	700.3
Montgomery	1,361.1	5.3	60.4	1,426.9
Philadelphia	6,073.9	68.1	269.7	6,411.7
Region Total	\$9,689.8	\$83.2	\$430.3	\$10,203.3

Philadelphia & The Countryside – Travel Industry Impacts, 2016 & 2017

PHILADELPHIA AND THE COUNTRYSIDE TRAVEL INDUSTRY IMPACTS, 2016 and 2017 (dollar amounts in millions)

2017	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Bucks	\$831.7	9,235	\$296.5	\$56.5	\$55.6
Chester	800.2	7,679	275.9	53.7	52.2
Delaware	692.4	7,850	310.7	53.0	54.7
Montgomery	1,390.3	14,147	535.8	97.8	98.2
Philadelphia	6,298.9	37,046	2,073.2	454.3	397.9
Region Total	\$10,013.5	75,958	\$3,492.1	\$715.3	\$658.7
% Change	3.3%	1.7%	6.9%	3.0%	2.9%

2016	Traveler Spending	Employment	Labor Income	Taxes	
				State & Local	Federal
Bucks	\$814.4	9,161	\$281.7	\$55.5	\$54.8
Chester	772.5	7,500	262.9	52.4	51.4
Delaware	667.8	7,694	288.6	51.0	52.8
Montgomery	1,361.1	13,967	519.6	96.8	98.2
Philadelphia	6,073.9	36,363	1,912.6	438.5	382.8
Region Total	\$9,689.8	74,685	\$3,265.4	\$694.3	\$640.0

Philadelphia & The Countryside – Travel Economy Impacts, 2016 & 2017

PHILADELPHIA AND THE COUNTRYSIDE TRAVEL ECONOMY IMPACTS, 2016 and 2017 (dollar amounts in millions)

2017	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Bucks	\$870.6	16,213	\$559.4	\$98.8	\$112.3
Chester	837.7	13,273	520.1	93.6	105.5
Delaware	724.8	13,721	576.5	93.1	110.8
Montgomery	1,454.7	23,951	1,001.1	171.5	198.6
Philadelphia	6,635.0	58,803	3,878.3	761.2	803.6
Region Total	\$10,522.7	125,962	\$6,535.5	\$1,218.2	\$1,330.6
% Change	3.1%	0.7%	2.6%	3.3%	3.0%

2016	Total Travel Demand	Employment	Labor Income	Taxes	
				State & Local	Federal
Bucks	\$854.0	16,174	\$548.0	\$96.8	\$110.6
Chester	810.3	13,082	511.0	91.3	103.8
Delaware	700.3	13,631	559.8	89.3	106.8
Montgomery	1,426.9	23,840	1,003.3	169.6	198.4
Philadelphia	6,411.7	58,307	3,748.3	732.2	772.8
Region Total	\$10,203.3	125,034	\$6,370.5	\$1,179.2	\$1,292.5

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