

The Economic Impact of Motorcoach Tourism in Southwestern Pennsylvania



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**Prepared for
The American Bus Association Foundation
Pittsburgh and Its Countryside**

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Executive Summary

- ❖ About 270 companies sent as many as 4,100 motorcoaches to Pittsburgh and Its Countryside in 2006. These buses carried about 43,000 overnight guests and 108,000 day-trippers.
- ❖ A total of \$39.3 million was spent on or by guests coming to Pittsburgh by bus in 2006. Of this, \$12.1 million was spent on retail purchases, \$11.5 million on food and beverages, \$7.1 million on admissions fees to attractions and over \$6.5 million on accommodations.
- ❖ In addition to this spending, motorcoach operators spend as much as \$1.7 million in Southwestern Pennsylvania on operational expenses like fuel, parking or repairs.
- ❖ The direct spending supported as many as 1,030 jobs in the local economy (see table below). The total economic impact of motorcoach tourism was nearly \$34 million.

Summary of Total Economic Impact¹ by Industry Motorcoach Tourism in Pittsburgh and Its Countryside²

Industry	Employment	Value Added	Compensation
Total Impact	1,032.3	\$ 33,872,540	\$ 20,695,342
Retail Trade	287.9	\$ 10,992,891	\$ 6,491,029
Food services and drinking places	272.4	\$ 6,201,494	\$ 4,252,676
Performing arts companies	177.0	\$ 2,172,061	\$ 1,619,281
Lodging and Hotels	103.3	\$ 4,917,789	\$ 2,532,385
Museums, Historical Sights Etc	51.4	\$ 1,209,128	\$ 1,480,189
Transit and ground passenger transportation	44.1	\$ 1,308,283	\$ 889,128
All Other	96.2	\$ 7,070,895	\$ 3,430,653

- ❖ It is estimated that \$4.2 million in state and local tax revenues were generated from motorcoach based tourism in the Pittsburgh area. Of this \$1.5 million came from property taxes, nearly \$1.4 million from sales and use taxes and about \$460,000 from income taxes.

Summary of Total Economic Impact by Tour Type

Trip Type	Average Number of Passengers	Average Package Price	Additional Spending Per Passenger	Local Percentage	Total Impact
Day Trip	36.87	\$ 108.44	\$ 18.38	68%	\$ 3,159.68
One Night Trip	36.23	\$ 258.90	\$ 209.70	69%	\$ 11,660.11
Two Night Trip	36.23	\$ 517.80	\$ 419.41	69%	\$ 23,320.22
Three Night Trip	36.23	\$ 776.70	\$ 629.11	69%	\$ 34,980.34
Four Night Trip	36.23	\$ 1,035.60	\$ 838.81	69%	\$ 46,640.45

- ❖ The average day trip to Pittsburgh and Its Countryside brings about \$3,100 to the local economy, while the average overnight bus trip generates an impact of just under \$11,700.
- ❖ Even though the economic impact of motorcoach tourism is concentrated, 83 different industries are significantly impacted by either motorcoach based tourists or bus operations.
- ❖ The jobs supported by motorcoach tourism tend to be those held by many of Pittsburgh's lower income residents. In fact, over 26 percent of the jobs are in the restaurant and bar sector, an area that tends to employ many people who are just entering the labor force.

¹ Value added is not always equal to spending. For example, if a tourist purchases a t-shirt from a Butler County retailer for \$10, it is likely that most of the actual value of the item was generated in another location. For example, if the shirt was manufactured in North Carolina, designed in New York City and warehoused in Cleveland only the part of the \$10 added by the retailer (likely about \$2.50) is included in this \$33.8 million figure. Employee compensation is included in value added. Compensation is equal to wages and benefits to employees in the defined industry.

² Defined as the 12 County region surrounding Pittsburgh. The counties are: Allegheny, Armstrong, Beaver, Butler, Greene, Indiana, The Laurel Highlands (Fayette, Somerset and Westmoreland), Lawrence, Mercer and Washington.

Introduction

With nearly 2.4 million residents, Southwestern Pennsylvania, comprises the nation's 21st largest Metropolitan Statistical Area. Comprised of the City of Pittsburgh and the surrounding 12 counties, Pittsburgh and Its Countryside is home to some of the nation's premier tourism destinations including Fallingwater, the Carnegie Museums, and Historic Harmony. In addition Pittsburgh and Its Countryside is home to 3 major professional sports teams, over 29 colleges and universities and the headquarters of 6 Fortune 500 corporations including United States Steel and H.J. Heinz.

It has been estimated that the Pittsburgh area hosts over 10 million visitors per year. According to the CVB, the travel industry in Allegheny County alone generates some 50,000 jobs and provides \$3 billion to the local economy.³

One of the ways that tourists visit Pittsburgh and Its Countryside is by motorcoach. In fact, based on the analysis presented in this paper, it is estimated that over 151,000 tourists visit the region on a motorcoach based tour each year (either on a day-trip or as an overnight visitor). This does not count passengers on intra-city based tours (for example those traveling from the Fallingwater to Kentuck Knob on a local tour bus).

Tourists visiting attractions and events in the Pittsburgh region can provide significant economic benefits to local businesses, generate sales and excise tax revenues for the cities and the county, and provide needed attendees for local cultural attractions also frequented by area residents. All of these activities serve to stimulate the local economy.

The purpose of this report is to quantify the linkages between motorcoach based tourism and the regional economy and to document their economic contributions to the people of Pittsburgh and Its Countryside. In order to examine this impact, telephone interviews were conducted with motorcoach carriers to collect data on the number and duration of tours, lodging information, and other spending. These data were combined with information collected from a self-administered survey of visitors, and analyzed using a regional input-output model developed by the Minnesota IMPLAN Group to calculate the full economic impact of the motorcoach tourism in the Pittsburgh area.

The results suggest that these visitors make a significant contribution to the regional economy both in terms of outputs and jobs. They bring in a substantial number of visitors who stay in local hotels, make purchases including admissions tickets, food, gasoline, and general merchandise. This initial spending amounts to nearly \$40 million. The economic impact of this spending on Pittsburgh and Its Countryside is nearly \$34 million, generating as many as 1,030 regional jobs and almost \$8 million in tax revenues.⁴

³ See: *Pittsburgh by the Numbers*, online at: www.visitpittsburgh.com/static/index.cfm?contentID=586.

⁴ Full-time equivalent positions.

Background

This report focuses on the economic impact of motorcoach based tourism in Pittsburgh, Pennsylvania and in the twelve surrounding counties (hereafter referred to as Pittsburgh). GuerrillaEconomics, LLC was commissioned by Pittsburgh and Its Countryside and the American Bus Association Foundation to conduct this research in the fall of 2006. This analysis is based on data collected from a telephone survey of 36 bus operators, and user initiated surveys of passengers on tours to Pittsburgh. Data were collected during the fall and early winter of 2006.

This is the fourth in a series of reports sponsored by the ABA Foundation examining the economic impact of motorcoach tourism on specific destination markets. The first, which was released in January 2002, examined the impact in Washington, D.C., Lancaster, Pennsylvania, and New York City. The second report, which was released in June 2005, examined data for Chicago Illinois. Both of these reports were conducted by students and professors from the George Washington University, and presented data on total spending by motorcoach tourists in each of the venues. In the summer of 2006, we presented the results from a report examining the economic benefits of motorcoach based tourism on the Greater Cleveland area. The analysis presented in this report is similar to that research.

This analysis, examines similar data for the City of Pittsburgh and the 12 surrounding counties. It is based on extensive surveys of motorcoach operators and passengers in the market. The data are then imported into an input-output model of the southwestern Pennsylvania economy and estimates of total economic impact, employment, wages and tax revenues are calculated. The analysis uses a comprehensive input-output modeling framework first developed by the US Government and now maintained by the Minnesota IMPLAN Group. This is one of the standard methodologies used in economic impact modeling.

Data gathered from the surveys conducted by GuerrillaEconomics staff, along with additional information from: Pittsburgh and Its Countryside, the American Bus Association Foundation, Dun & Bradstreet, and other sources were used in this analysis. Statistical tests were performed on data and models to insure consistency and accuracy. Summary results were compared to prior surveys of motorcoach tourism to Cleveland and to the Chicago area to insure that they were within normal parameters. The table below compares estimates of total sales from the projected number of motorcoach tourists from three different sources. The results from this study are slightly higher than estimates from a 2005 study done for the Greater Cleveland CVB, and lower than those found in a George Washington University analysis of tourism in the Chicago market.⁵

Comparative Sales Statistics

	Day Trip Sales	Overnight Sales	Total Sales
Chicago GWU Study	\$ 33,793,411	\$ 15,423,473	\$ 49,216,884
Greater Cleveland Study (Guerrilla Economics)	\$ 19,866,748	\$ 4,819,471	\$ 24,686,219
Pittsburgh and Its Countryside (GE Estimate)	\$ 12,135,516	\$ 20,445,194	\$ 32,580,710

This analysis also conforms to provisions outlined in the economic literature pertaining to the

⁵ Neirotti, Lisa Delpy, Bus Tours and Bus Passengers: Impact on Chicago's Economy, prepared for the American Bus Association Foundation, Washington, D.C. May 2005.

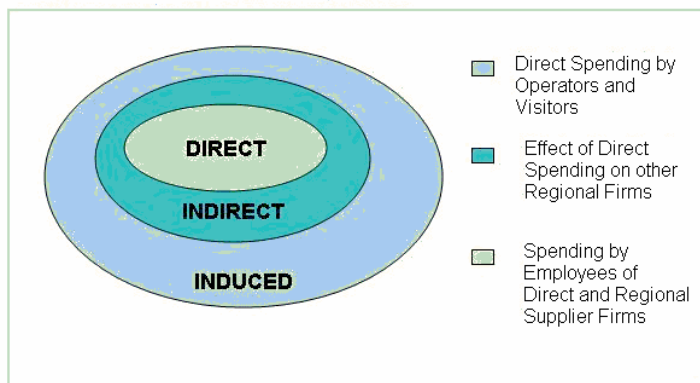
impact of the tourism industry. Generally, tourism is defined as a set of socio-economic activities carried out either by or for tourists. Tourism is primarily a consumption activity. Therefore, the size of tourism in an economy is often measured by total expenditure in the economy for tourism purposes.⁶ Tourism has both a demand side and a supply side; however, to correctly measure the size of tourism and estimate tourism's contribution to GDP, an input-output framework should be used.

⁶ See: Han, Xiaoli, and Bingsong Fang, *Measuring the size of tourism and its impact in an economy*, Statistical Journal of the UN Economic Commission for Europe; Vol. 14, Issue 4, 1997 and Vaughn, D.R., et. al., *Estimating and interpreting the local economic benefits of visitor spending: an explanation*, Leisure Studies, Volume 19, 2000.

Methodology

The economic impact analysis of motorcoach tourism in Pittsburgh and Its Countryside begins with an accounting of spending in the various sectors of the economy. Tourism is not a defined industry like steelmaking, or publishing, but rather encompasses a wide range of companies in many parts of the economy. As such, the definition of tourism can be interpreted differently depending on the context of the analysis.

In this case, the motorcoach tourism industry is defined as all spending by non-scheduled motorcoach operators and passengers on visits to the 12-county region. The analysis does not include spending by passengers to Pittsburgh on scheduled service by common carriers or on intra-regional travel such as on transit busses. The analysis includes spending on operations, lodging, food and beverages, admissions and incidentals in the City of Pittsburgh and the surrounding 12 county region; however, it only includes spending directly related to passengers. If, for example a carrier has a regional repair facility located in Pittsburgh, while this certainly generates jobs, taxes and economic activity in the city, these impacts are not included in this particular analysis.



The data are based on responses to telephone based surveys with tour operators and mail-in surveys of passengers.

It is sometimes mistakenly thought that initial spending accounts for all of the impact of an economic activity or a product. For example, at first glance it may appear that consumer expenditures for say lunch at a

restaurant are the sum total of the impact on the local economy. However, one economic activity always leads to a ripple effect whereby other sectors and industries benefit from this initial spending. This inter-industry effect of an economic activity can be assessed using multipliers from regional input-output modeling.

The economic activities of events are linked to other industries in the state and national economies. The activities required to produce a lunch, from obtaining foodstuffs, to shipping, to purchasing natural gas for the stove generate the direct effects on the economy. Regional (or indirect) impacts occur when these activities require purchases of goods and services such as building materials from local or regional suppliers. Additional, induced impacts occur when workers involved in direct and indirect activities spend their wages in the region. The ratio between total economic and direct impact is termed the multiplier. The framework in the chart on the prior page illustrates these linkages.

There are a number of methods available for conducting an economic impact analysis; however, we believe that the input-output methodology is both the most appropriate and the easiest to understand. Unfortunately, this type of analysis is easily abused, and many studies are published

that present totally inflated and unrealistic “multiplier effects” of an industry or activity.⁷ In this analysis we are careful to not only include the appropriate impacts, but are very cautious in our application of industry multipliers.

This method of analysis allows the impact of local production activities to be quantified in terms of final demand, earnings, and employment in the state and the Pittsburgh region.

Once the direct impact of the industry has been calculated, the input-output methodology discussed below is used to calculate the contribution of the supplier sector and of the re-spending in the economy by employees in the industry and its suppliers. This induced impact is the most controversial part of economic impact studies and is often quite inflated. In the case of the motorcoach model, only the most conservative estimate of the induced impact has been used.

⁷

We have reviewed a large number of other studies that present the economic impact of an activity as a series of spending cycles. When this is done, the direct and supplier impacts (often called induced impacts) are calculated in much the same way as we have in this study. The difference lies in the calculation of the induced impacts (the multiplier effect). While we conservatively define the induced impact to be solely the result of re-spending by the employees counted in the direct and supplier impact, many other analysts include round after round of supplier re-spending. In other words, if we were to calculate the economic impact of automobile manufacturing, we would include the production of glass for the windows and the re-spending on say household items by workers in the glass factory. We would not, however, include the economic impact of the sand and natural gas that went into the production of the glass, for this is not the economic impact of the automobile industry, but rather of the glass industry.

Model Description and Data

This Economic Impact (Model) was developed by GuerrillaEconomics, LLC based on data provided by D&B, Inc., Pittsburgh and Its Countryside, The American Bus Association Foundation and the federal government. The analysis utilizes the Minnesota IMPLAN Group Model in order to quantify the economic impact of the motorcoach based tourism on the state of Pennsylvania and the Pittsburgh area. The model adopts an accounting framework through which the relationships between different inputs and outputs across industries and sectors are computed. This model can show the impact of a given economic decision – such as a factory opening or operating a sports facility – on a pre-defined, geographic region. It is based on the national income accounts generated by the US Department of Commerce, Bureau of Economic Analysis (BEA).⁸

Every economic impact analysis begins with a description of the industry being examined. In the case of this model, the motorcoach tourism industry is defined as to incorporate firms in the following economic sectors:

- ❖ **Motorcoach Transportation:** Including firms that transport individuals from outside of the 12-county region into the area. The Motorcoach Transportation sector also includes company-owned offices and operations located within the region.
- ❖ **Lodging:** This includes hotels, motels, hostels and other operations involved in housing visitors to Pittsburgh and Its Countryside.
- ❖ **Eating and Drinking Places:** This includes all restaurant and bars selling food and beverages to visitors while in the Pittsburgh area. Sales may be made directly to the carrier and be included in the package price, or may be made directly to the visitor themselves.
- ❖ **Retailing:** This includes firms involved in the sale of retail goods to motorcoach visitors. Model limitations preclude the inclusion of ABC stores, military stores, colleges, or other government owned outlets as part of the retailing sector.
- ❖ **Attractions and Events:** This includes firms involved in either the entertainment or educational industry. Organizations such as Fallingwater, museums, amusement arcades and parks, theaters are also included in this sector. This also includes all firms involved in either the visual or performing arts. It only includes spending by visitors, as all admissions fees are included in the Amusement sector. Finally, visitors to professional, amateur and semi-professional sporting teams, and firms providing sports services to visitors such as private tennis courts or bowling alleys are included.

⁸ RIMS II is a product developed by the U.S. Department of Commerce, Bureau of Economic Analysis as a policy and economic decision analysis tool. IMPLAN was originally developed by the US Forest Service, the Federal Emergency Management Agency and the Bureau of Land Management. It was converted to a user-friendly model by the Minnesota IMPLAN Group in 1993.

- ❖ **Local Transportation:** This sector includes firms providing intra-regional transportation services to (mostly) overnight visitors. Firms operating taxicabs, local jitneys, or limousines would be included in this sector.
- ❖ **Personal Services:** This includes firms providing personal services to (mostly) overnight guests. Firms in this sector would include hair stylists, health clubs, dry cleaners, laundries and shoe shine stands.

Data were gathered from two separate surveys. The first consisted of an extensive telephone interview with 36 motorcoach operators. This is 13 percent of the estimated 274 carriers that operate tours in Pittsburgh.⁹ This survey was enhanced with a self-administered survey of visitors to Pittsburgh taken over a three month period from October 2006 to December 2006. The data were statistically validated and entered into our model of the Pennsylvania economy. More detail on the surveys and copies of the instruments are presented as an appendix to this report.

In addition to spending on or by tourists, estimates of motorcoach-company operating expenses were developed based on the multipliers and margins included in the IMPLAN model of the state of Pennsylvania. The model contains estimates of all of the components used in providing each dollar of motorcoach transportation. For example, 4.8 percent of each dollar generated by motorcoach operators is attributable to petroleum refining, and 3.3 percent to automotive parts and accessories. Since only part of this spending by carriers will be spent in the Pittsburgh area, the total must be adjusted to reflect the percentage of each sector of the state economy located in the 12 counties. This is done using data from Dun and Bradstreet. Businesses in Pennsylvania are located by zip code, and the percentage in each industry located in each county is calculated. These percentages are applied to each margin in the analysis. The final result is that about 13 percent of the motorcoach operational spending will be in the region.¹⁰

The IMPLAN Group model is designed to run based on the input of specific direct economic factors. It uses a detailed methodology (see Methodology section) to generate estimates of the direct, supplier and induced impacts, as well as federal, state and local tax collections resulting from the spending described above. In the case of this model, sales from motorcoach tourism and tourists are used as a base starting point for the analysis. Sales are estimated based on the results of the two surveys outlined in the Appendix. This data was supplemented by information provided to GuerrillaEconomics by Dun & Bradstreet, Inc. as of December 2006. Dun & Bradstreet data is recognized nationally as a premier source of micro industry data. The D&B database contains information on over 15 million businesses in the United States.¹¹ It is used extensively for credit reporting, and according to the vendor, encompasses about 98 percent of all business enterprises in the country. This data is gathered at the facility level; therefore, a

⁹ This is the total number of carriers operating in Pittsburgh as defined by the ABA plus all additional carriers located within 600 miles of Pittsburgh.

¹⁰ Note that the percentage of each dollar reportedly spent on operations from the Pittsburgh survey was significantly less than the percentage that we found from Cleveland.

¹¹ The D&B information database updates over 1 million times a day, over 350 million payment experiences are processed annually, and over 110 million phone calls are made to businesses. In addition, D&B uses a patented matching technology and over 2,000 information computer validations to ensure a high standard of data quality.

company with a retail store, warehouse and sales office would have three facilities, each with separate employment counts.

The initial inputs for the model come from the spending estimates that come from the two surveys. This includes spending by motorcoach companies on services like lodging, food and beverages and admissions, as well as consumer spending on food, retail purchases, entertainment, personal services etc. In addition, the estimate of spending on motorcoach operations in Pittsburgh directly resulting from the transportation of tourists is included. These spending estimates are entered into the appropriate industries in the model and either household (personal spending) or industry (company spending) margins are applied. All data and models are adjusted by inflation to 2006 dollars.¹²

Once the initial direct spending figures have been established, they are entered into a model linked to the IMPLAN database, with the appropriate marginal adjustments taken to ensure that the model is working solely off of consumer spending estimates. The IMPLAN data are used to generate estimates of direct wages and output in each of the sectors in the motorcoach tourism industry. Wages are derived from data from the U.S. Department of Labor's ES-202 reports that are used by IMPLAN to provide annual average wage and salary establishment counts, employment counts and payrolls at the county level. Since this data only covers payroll employees, it is modified to add information on independent workers, agricultural employees, construction employees, and certain government employees. Data are then adjusted to account for counties where non-disclosure rules apply. Wage data include not only cash wages, but health and life insurance payments, retirement payments and other non-cash compensation. It includes all income paid to workers by employers.

Total output is the value of production by industry in a given state. It is estimated by IMPLAN from sources similar to those used by the BEA in its RIMS II series. Where no Census or government surveys are available, IMPLAN uses models such as the Bureau of Labor Statistics Growth model to estimate the missing output.

The model also includes information on income received by the Federal, State and Local Governments, and produces estimates for the following taxes at the Federal Level: Corporate Income; Payroll, Personal Income, Estate and Gift, and Excise taxes, Customs Duties; and Fines, Fees, etc. State and local tax revenues include estimates of: Corporate Profits, Property, Sales, Severance, Estate and Gift and Personal Income Taxes; Licenses and Fees and certain Payroll Taxes.

While IMPLAN is used to calculate the state level impacts, Dun and Bradstreet data provide the basis for regional estimates. Publicly available data at the county level is limited by disclosure restrictions, especially for smaller sectors of the economy like motorcoach operations. This model therefore uses actual physical location data provided by Dun and Bradstreet in order to allocate jobs – and the resulting economic activity – by county. Pittsburgh and Its Countryside is assumed to be the 12 county region comprised of: Allegheny, Armstrong, Beaver, Butler, Greene, Indiana, The Laurel Highlands (Fayette, Somerset and Westmoreland), Lawrence, Mercer and Washington Counties in Pennsylvania. Job allocations are based on the percentage

¹² Please note that the actual model relationships are as of 2003.

of total jobs physically located in each county. Physical locations are based on either actual address of the facility, or the zip code of the facility, with facilities placed randomly throughout the zip code area. All supplier and indirect jobs are allocated based on the percentage of a state's employment in that sector in each of the counties. Again, these percentages are based on Dun and Bradstreet data.

The results of the model are presented in the following four sections of this report, and individual county breakdowns are included as an Appendix.

Direct Impacts

Direct economic impacts are best defined as activities that one can actually count. Therefore, the direct economic impact of motorcoach tourism in Pittsburgh consists of those jobs and the economic activity generated by the initial spending by the 151,000 visitors and 4,100 buses. The spending itself is not equal to the economic impact as much of the money will be paid out to regional, national or even international suppliers and will not stay in the regional economy.

Summary of the Size of the Motorcoach Tourism Industry Pittsburgh and Its Countryside

Data Element	Value
Number of Companies	274
Number of Buses	4,112
Number of Visitors	150,855
Daytrip	107,765
Overnight	43,090
Spending By Category	
Lodging	\$ 6,523,330
Food and Beverage	\$ 11,487,395
Transportation	\$ 222,446
Retail Purchases	\$ 12,146,195
Arts and Admissions	\$ 7,141,065
Personal Services	\$ 22,322
Total Tourist Spending	\$ 37,542,753
Bus Company (fuel etc.)*	\$ 1,716,520
Total Spending in Pittsburgh and Its Countryside	\$ 39,259,273
Spending Per Person	\$ 248.87
Bus Per Person	\$ 11.38

Note: Bus Company Spending Allocated to Pittsburgh and Its Countryside: 13.1%

The table above outlines the \$39 million in actual spending by motorcoach operators and tourists in Pittsburgh. About a third of this went for retail purchases and will not generate a great deal of activity in Pittsburgh proper. Other sectors such as spending on food and beverages, on the arts, or on lodging will have a greater impact on the local economy. On average, each visitor (or the company on a visitor's behalf) spent about \$250 in Pittsburgh and Its Countryside. In addition, the motorcoach operators spent about \$11 on each passenger for items such as fuel, parking, or other supplies in the region.

The \$39 million in spending generated a direct economic impact in Pittsburgh and Its Countryside of nearly \$26 million, and almost 900 jobs. Of these, about a third (31 percent) were with local retailers, about a quarter (27.5 percent) were in local restaurants and bars, and a quarter in entertainment venues (see table on the following page).

Economic Impact Motorcoach Tourism in Pittsburgh and Its Countryside - Direct Effects

Industry	Employment	Value Added	Compensation
Total Impact	896.8	\$ 25,783,939	\$ 16,597,737
General merchandise stores	281.5	\$ 10,750,862	\$ 6,348,117
Food services and drinking places	246.6	\$ 5,613,930	\$ 3,849,754
Performing arts companies	173.8	\$ 2,133,045	\$ 1,590,196
Hotels and motels- including casino hotels	101.4	\$ 4,825,419	\$ 2,484,820
Museums- historical sites- zoos- and parks	51.2	\$ 1,203,478	\$ 1,473,272
Transit and ground passenger transportation	42.1	\$ 1,247,237	\$ 847,640
Other personal services	0.2	\$ 9,968	\$ 3,937

Supplier and Induced Impacts

Economic activity started by motorcoach tourists generates output (and jobs) in hundreds of other industries, often in states far removed from the original economic activity. The impact of supplier firms, and the “Induced Impact” of the re-spending by employees of industry and supplier firms, is calculated using an input/output model of the United States.

The model methodology is designed to calculate these impacts for the State of Pennsylvania. Since this analysis examines only the impact in a 12 county region, the results are multiplied by the percentage of jobs in each industry located in each of the counties in the southwestern Pennsylvania area. Because of this the multiplier effect of motorcoach tourism in Pittsburgh and Its Countryside is fairly small. For example, there are about 40 supplier jobs in the region. This represents just about 37 percent of total supplier jobs in the state of Pennsylvania. The largest suppliers in the region are in the wholesaling industry, food services and the arts.

Economic Impact Motorcoach Tourism in Pittsburgh and Its Countryside Supplier Effects

Industry	Employment	Value Added	Compensation
Total Impact	40.3	\$ 2,661,308	\$ 1,397,797
Wholesale trade	5.6	\$ 656,886	\$ 353,103
Food services and drinking places	4.6	\$ 103,795	\$ 71,177
Independent artists- writers- and performers	3.4	\$ 65,822	\$ 43,632
Promoters of performing arts and sports and agents	2.5	\$ 52,315	\$ 21,360
Performing arts companies	2.2	\$ 27,112	\$ 20,212
Truck transportation	1.5	\$ 93,931	\$ 56,875
Transit and ground passenger transportation	1.3	\$ 39,830	\$ 27,069
Drycleaning and laundry services	1.2	\$ 40,543	\$ 26,680
Warehousing and storage	1.1	\$ 76,481	\$ 50,367
Real estate	1.1	\$ 156,653	\$ 15,876
Maintenance and repair of nonresidential buildings	1.0	\$ 54,146	\$ 37,783
Newspaper publishers	0.9	\$ 58,998	\$ 39,908
Power generation and supply	0.8	\$ 394,548	\$ 97,542
Food and beverage stores	0.7	\$ 27,979	\$ 16,469
Other State and local government enterprises	0.7	\$ 45,545	\$ 39,368
Management consulting services	0.7	\$ 55,207	\$ 39,959
General merchandise stores	0.6	\$ 21,769	\$ 12,854
Hotels and motels- including casino hotels	0.6	\$ 30,008	\$ 15,452
Spectator sports	0.6	\$ 33,689	\$ 23,371
State and local government passenger transit	0.6	\$ 3,381	\$ 30,415
Other Industries	8.7	622,672.5	358,323.3

Induced jobs are the result of re-spending in the local economy by employees of direct and supplier firms. For example, an employee of a hotel serving motorcoach tourists will purchase products like food, telephone services and housing in the local economy. This re-spending creates a “multiplier” effect and produces induced impacts in Pittsburgh and Its Countryside. As with the supplier effects, the induced impacts are calculated for the entire state of Pennsylvania and must be adjusted to reflect only those in each of the counties. For example, there are about 95 induced jobs in Pittsburgh and Its Countryside. This represents about 52 percent of the total induced jobs in Pennsylvania.

Economic Impact Motorcoach Tourism in Pittsburgh and Its Countryside Induced Effects

Industry	Employment	Value Added	Compensation
Total Impact	95.1	\$ 5,427,293	\$ 2,699,809
Food services and drinking places	21.2	\$ 483,769	\$ 331,745
Food and beverage stores	6.9	\$ 276,429	\$ 162,719
Wholesale trade	6.5	\$ 766,553	\$ 412,054
General merchandise stores	5.8	\$ 220,260	\$ 130,059
Motor vehicle and parts dealers	4.6	\$ 333,415	\$ 193,668
Miscellaneous store retailers	3.9	\$ 85,749	\$ 50,255
Private households	3.4	\$ 36,575	\$ 20,752
Clothing and clothing accessories stores	3.1	\$ 125,670	\$ 65,698
Building material and garden supply stores	2.6	\$ 145,679	\$ 81,897
Health and personal care stores	2.5	\$ 121,696	\$ 72,021
Other amusement- gambling- and recreation industri	2.5	\$ 97,139	\$ 49,750
Nonstore retailers	2.4	\$ 116,373	\$ 46,216
Hospitals	2.0	\$ 110,514	\$ 103,567
Gasoline stations	1.9	\$ 77,067	\$ 35,387
Personal care services	1.9	\$ 54,718	\$ 32,253
Offices of physicians- dentists- and other health	1.7	\$ 141,840	\$ 97,385
Sporting goods- hobby- book and music stores	1.6	\$ 56,544	\$ 32,048
Hotels and motels- including casino hotels	1.3	\$ 62,362	\$ 32,113
Furniture and home furnishings stores	1.2	\$ 72,033	\$ 37,100
Truck transportation	1.1	\$ 73,474	\$ 44,488
Other Industries	16.9	1,969,434.9	668,634.7

Total Impacts

The table on the following page presents details of the total impact of motorcoach tourism in Pittsburgh and Its Countryside. The firms most reliant on this activity are local retailers and restaurants. Over 54 percent of the jobs and 51 percent of total economic activity is in this sector. Other industries that receive significant business from motorcoach tourism are service stations, amusement services, transportation firms and wholesalers and hotels. Manufacturing industries are impacted as tourists and the companies involved in the tourism industry purchase goods manufactured by Southeastern Pennsylvania based firms.

The total economic impact (presented here as value added) is lower than the actual spending in the Pittsburgh area. That is because much of this spending is on retail goods, and most of the value embedded in these products comes from other states (or other countries) and does not add value to the Pittsburgh economy. For example, if a visitor purchases a t-shirt for \$10 from a local vendor, only a small fraction of that \$10 is attributable to local activities (mainly wholesaling, retailing, financing, etc.) The shirt itself may have been manufactured in North Carolina, or China, and the economic impact of that activity is properly allocated to that specific geography.

**Economic Impact Motorcoach Tourism in Pittsburgh and Its Countryside
Total Effects**

Industry	Employment	Value Added	Compensation
Total Impact	1,032.3	\$ 33,872,540	\$ 20,695,342
General merchandise stores	287.9	\$ 10,992,891	\$ 6,491,029
Food services and drinking places	272.4	\$ 6,201,494	\$ 4,252,676
Performing arts companies	177.0	\$ 2,172,061	\$ 1,619,281
Hotels and motels- including casino hotels	103.3	\$ 4,917,789	\$ 2,532,385
Museums- historical sites- zoos- and parks	51.4	\$ 1,209,128	\$ 1,480,189
Transit and ground passenger transportation	44.1	\$ 1,308,283	\$ 889,128
Wholesale trade	12.1	\$ 1,423,439	\$ 765,157
Food and beverage stores	7.6	\$ 304,408	\$ 179,188
Motor vehicle and parts dealers	5.1	\$ 366,302	\$ 212,771
Miscellaneous store retailers	4.3	\$ 94,604	\$ 55,445
Independent artists- writers- and performers	3.5	\$ 67,862	\$ 44,985
Clothing and clothing accessories stores	3.4	\$ 138,436	\$ 72,371
Private households	3.4	\$ 36,575	\$ 20,752
Promoters of performing arts and sports and agents	3.0	\$ 63,274	\$ 25,835
Building material and garden supply stores	2.9	\$ 160,097	\$ 90,003
Health and personal care stores	2.8	\$ 134,347	\$ 79,507
Truck transportation	2.6	\$ 167,406	\$ 101,363
Nonstore retailers	2.6	\$ 127,864	\$ 50,780
Other amusement- gambling- and recreation industri	2.6	\$ 102,094	\$ 52,288
Gasoline stations	2.1	\$ 86,063	\$ 39,518
Other Industries	38.1	3,798,124.9	1,640,691.0

The distribution of the impacts can also be looked at on a “per bus” or per-trip basis. Examining the data this way shows that the average day trip to Pittsburgh brings about \$3,100 to the local economy, while the average overnight bus trip generates an impact of just under \$12,000. Again, it should be noted that the impact on the Pittsburgh economy is equal to about 69 percent of the actual amount spent on a trip, or in other words, for each dollar that a motorcoach tourist spends in Pittsburgh and Its Countryside, about 69-cents stays in the local economy.

Summary of Total Economic Impact by Tour Type

Trip Type	Average Number of Passengers	Average Package Price	Additional Spending Per Passenger	Local Percentage	Total Impact
Day Trip	36.87	\$ 108.44	\$ 18.38	68%	\$ 3,159.68
One Night Trip	36.23	\$ 258.90	\$ 209.70	69%	\$ 11,660.11
Two Night Trip	36.23	\$ 517.80	\$ 419.41	69%	\$ 23,320.22
Three Night Trip	36.23	\$ 776.70	\$ 629.11	69%	\$ 34,980.34
Four Night Trip	36.23	\$ 1,035.60	\$ 838.81	69%	\$ 46,640.45

Estimated Tax Impacts

The study also estimates taxes paid by the industry and its employees. Federal taxes include industry-specific excise taxes, business and personal income taxes, FICA, and unemployment insurance paid by those companies that make up the motorcoach tourism industry in Pittsburgh and their employees. State and local tax systems vary widely, and the IMPLAN model makes aggregated estimates. Direct state and local taxes consist primarily of sales based taxes, property taxes and income taxes from industry employees. As would be expected in an industry made up mainly of consumption based activities, sales taxes account for a large percentage of state and local tax revenue generated and equal about 3.5 percent of total sales to both consumers and motorcoach carriers.

In sum, motorcoach tourism is expected to generate about \$7.9 million in taxes in 2006, about half of which are federal taxes. Looking at it another way, taxes account for about 23 percent of the industry impact, and state and local governments receive \$28.20 in tax revenues per passenger visiting Pittsburgh and Its Countryside.

Summary of Economic Impact Motorcoach Tourism in Pittsburgh and Its Countryside Fiscal Effects

	Annual Estimate	Percent
Federal Taxes	\$ 3,677,412.95	46.4%
State and Local Taxes	\$ 4,254,022.44	53.6%
Sales Taxes	\$ 1,378,246.44	17.4%
Property Taxes	\$ 1,497,822.95	18.9%
Income Taxes	\$ 462,061.51	5.8%
Corporate Profit Taxes	\$ 246,927.29	3.1%
Other State and Local Taxes	\$ 668,964.24	8.4%
Total Taxes	\$ 7,931,435.39	100.0%

Appendix Telephone Interviews of Companies

GuerrillaEconomics, LLC contacted over 73 tour-bus operating companies and conducted extensive interviews with 36. Of these, 5 were identified by the ABA as being companies with extensive operations in the Pittsburgh area, and most of the remaining firms were members of the organization. All told, it is estimated that 274 companies operate tour-buses in the Pittsburgh area.¹³

Data from these surveys was used to generate estimates of total spending by bus operating companies on visitors to Pittsburgh and Its Countryside for 2006. The average number of busses operated by the companies was 22.4 (the data were however highly skewed with the median number being 14). The companies averaged just under 46 employees.

The survey questions are presented below.

Good morning/afternoon. My name is _____. I am calling on behalf of Pittsburgh and its Countryside and the American Bus Association. We are conducting a survey of tour operators who carry passengers in the Southwestern Pennsylvania area. The survey will take no more than 10 minutes. Can you help me with this, or can I speak with someone who might be able to assist us.

<< Get appropriate person on the phone >>

Thank you. Just to let you know, I work for the firm GuerrillaEconomics. We have been selected by Pittsburgh and its Countryside and the American Bus Association to conduct this survey. Pittsburgh and Its Countryside is an organization comprised of ten Tourism Promotion Agencies that work together to market southwestern Pennsylvania to motor coach groups, the leisure/consumer market, and international travelers. All of your answers to these questions will be aggregated with those of other respondents – and all information will be kept strictly confidential.

First, I need to ask you, do you or have you in the past year operated buses in the Pittsburgh or Southwestern Pennsylvania area? By this I mean the City of Pittsburgh and the surrounding region (Allegheny, Armstrong, Beaver, Butler, Greene, Indiana, Lawrence, Mercer and Washington Counties as well as the Laurel Highlands)

IF No>>

Are there any reasons that you could give to me why you do not operate tours in Southwestern Pennsylvania?

<<Record any reasons given>

Thank you for your time.

If Yes>>

¹³ Based on data from Dun and Bradstreet, 2005. There are 104 tour bus operating companies with operations within a 10 hour drive of the center of the 12 county region. This figure is used as a proxy for total operators, and the resulting total number of passengers calculated is about 40 percent greater than a 2005 estimate of room nights by the CVB.

1. How many people in general do you carry on the average bus tour to Pittsburgh and its Countryside?

Enter Number of people:

2. About how much do you charge per person (Daytrip/Overnight)?

Enter Dollar amount for package price per person:

3. For overnight packages, are accommodations included in the tour?

If yes, indicate dollar amount.

4. Were food and beverages included in package?

If yes, indicate dollar amount.

5. Are admissions and other incidentals included in the package price?

If yes, indicate dollar amount

6. About how many tours do you book to Pittsburgh and its Countryside per year?

Please enter number of tours.

7. What percentage of your passengers on tours to Pittsburgh and its Countryside are:

Please indicate:

- Seniors,
- Students,
- General Population
- Baby Boomers
- Families
- Grandparent/grandchildren
- Guys and gals weekends

8. What percentage of your passengers on tours to Pittsburgh and its Countryside are:

- Daytrip
- Overnight

9. Can you tell me what percentage of your tour attractions, overnight stays or meals are purchased in the following Counties. I will give you an example of the destinations and hotels in each county as an example.

County	Hotels	Destinations	Percent of Spending in Area		
			Hotel	Attractions	Meals
Allegheny	Best Western Parkway Center Holiday Inn Greentree	Downtown Pittsburgh Carnegie Museums Cultural District			
Armstrong	Quality Inn Royle Comfort Inn Kittanning	Tour-Ed Mine Kiski Railroad			
Beaver	Hampton Inn Beaver Vly Holiday Inn Beaver Falls	Raccoon Creek Park Old Economy Village			

Butler	Amerisuites Cranberry Fairfield Inn Butler	Historic Harmony Lernerville Speedway			
Greene	Super 8 Waynesburg Econolodge Waynesburg	WA Young Foundry High Point Raceway			
Indiana	Super 8 Indiana Pantall Hotel	Jimmy Stewart Museum Downtown Indiana			
Laurel Highlands	Knights Inn Greensburg Quality Inn New Stanton Ramada Inn Ligonier	Fallingwater Quecreek Mine Laurel Caverns			
Lawrence	Comfort Inn New Castle Hampton Inn New Castle	Amish Country Shops at Volant			
Mercer	Tara Radisson Sharon	Prime Outlets Tara			
Washington	Holiday Inn Meadowlands Hilton Garden Inn Canonsburg	Meadowcroft Museum Trolley Museum			

10. Is Pittsburgh and its Countryside a Destination or a pass-through city for daytrips/overnight trips?

Enter destination or pass through or both

11. Do you serve Pittsburgh and its Countryside Seasonally?

If Yes>>

11a. What percent of your riders to the area come in the:

- Summer
- Winter
- Spring
- Fall

Now I'd like to ask you a little about Pittsburgh and its Countryside as it pertains to your operating environment

12. What is your preferred method to receive information about Pittsburgh and its Countryside?

- Direct mail
- E-mail
- CD
- Phone

13. Which type of Group Tour Guide best fits your business?

- Hard Cover
- CD
- Downloadable (PDF, MP3)
- Other

14. Are FAMs important in introducing new destinations to you and your clients?

If Yes:

14a. What time of year is best to bring a FAM to Pittsburgh and its Countryside

14b. What type of FAMS work best for you

Group Leader FAM
Invitational FAM only to you and your staff

15. Are Facilities for motorcoaches in Pittsburgh adequate or inadequate?

If inadequate get details

16. Are Motorcoach parking facilities adequate in Pittsburgh and the surrounding region?

17. What facilities/infrastructure would you like to see improved?

18. Can you identify any new trends or interests that Pittsburgh and its Countryside should be looking to develop as a destination?

19. What helps drive Pittsburgh and its Countryside as a destination?

Events
Marketing
Cost
Demand

Now I just need to ask a few questions about your company

20. How many busses do you operate by size?

21. Can you tell me how many employees you have?

Thank you so much for your help. The American Bus Association will be making a copy of our final report available to you, and Pittsburgh and its Countryside will receive the information on how they can improve your operating environment.

In addition, we will be sending you a supply of survey cards within the next week or so. These cards should be distributed to passengers visiting Pittsburgh. They will allow us to collect information about the city and its countryside from your passengers. We will enter them in a drawing for a special prize to reward them for taking the survey with.

22. Would you be willing to assist us in this passenger survey?

Thank you once again for your assistance with our survey.

Appendix

Questionnaire Used for Personal Interviews

In conducting this analysis for the ABA and Pittsburgh and Its Countryside, GuerrillaEconomics, LLC, conducted a survey of motorcoach passengers on trips to the Pittsburgh area. We sent over 1000 surveys to passengers through the companies that we surveyed, and through specific venues including Fallingwater and the Heinz History Center. Unfortunately, the response rate was not as high as we had expected. Only 70 completed surveys were received, representing a response rate of about 7 percent. Based on our estimate of the number of passengers visiting Pittsburgh and Its Countryside during the survey period, the response rate was just 2-tenths of a percent.¹⁴

The survey instrument used in the study is presented below.

ECONOMIC IMPACT STUDY Pittsburgh Passenger Questionnaire

Thank you for visiting Pittsburgh and Its Countryside. We hope our unique blend of big city excitement and small town fun made for the perfect group tour experience, and that you will make a return visit to Southwestern Pennsylvania very soon.

This survey, which will only take a couple of minutes of your time to complete, will help us to better serve visitors to our area. Please enter your responses below, and drop the completed survey into one of our convenient drop box locations (located at information desks at Fallingwater, Prime Outlets, the Heinz History Center, and the Visitor Information Center on Liberty Ave., just off the Ft. Pitt Bridge), or if instructed by your driver return it to them.

You will automatically be entered to win a fantastic prize courtesy of Pittsburgh and its Countryside.

Please remember, except where indicated, all of the answers should apply to you personally, not to other members of your party. The data collected will not be used for marketing purposes and your individual responses will not be shared with anyone.

Thank you in advance for your assistance.

1. Was this a day trip or an overnight one?

1. Daytrip
2. Overnight

2. How many people were in your party? _____

3. How would you describe the group that you traveled with?

1. Student

¹⁴ Based on our estimate of 150,855 visitors per year, about 12,570 tourists would visit Pittsburgh each month, or 37,700 during the three month survey period. Since only 70 surveys were returned, this represents 0.18 percent of all travelers. This is a lower response rate than we would like; however, we have based our analysis on these responses, along with data from our survey of motorcoach operators.

2. Senior
3. Bank travel club
4. Culture and heritage tour
5. Reunion
6. Individual/private

Thank you – The answers to the following questions should apply to you personally. If you have children, or are responsible for someone else’s spending decisions, please answer these questions for you only.

4. How much did the tour package cost per person? Dollar amount: _____

5. Outside of the package price, how much did you spend on food and beverages during this trip?

Dollar amount: _____

6. Outside of the package price, how much did you spend on retail purchases other than food and beverages on this trip?

Dollar amount: _____

7. Other than transportation included in the package price, how much did you spend on other transportation once in the city (for example, taxicabs)?

Dollar amount: _____

8. Other than what was included in the package price, how much did you spend on personal services such as salons, spa, internet, valet or dry cleaning during this trip?

Dollar amount: _____

9. Outside of what was included in the package price, how much did you spend on amusements and entertainments attractions on this trip?

Dollar amount: _____

10. Did Pittsburgh and its Countryside:

1. Meet your expectations
2. Exceed your expectations
3. Disappoint you

11. Would you recommend Pittsburgh and its Countryside as a destination to your friends (Yes / No)?

12. Did you choose Pittsburgh and its Countryside as a destination because of:

1. The Tour package
2. It’s a new Destination
3. Repeat visitor

13. What was your favorite attraction in Pittsburgh and its Countryside?

14. How old are you? _____

15. Please enter your income in round numbers: _____

16. What is your education level?

1. Less than High School
2. High School
3. Some College
4. College Graduate
5. Graduate Degree

17. Where can we reach you to contact you about the drawing (email or phone):

Thank you once again for taking our survey.

We will contact you at the above email address or phone number if you are the winner of a prize. A drawing from all of the survey forms that we receive will be made at the end of November.

Please Remember to Leave Your Survey in a Drop-Box or Return it to Your Driver

Appendix IMPLAN Methodology:¹⁵

Francoise Quesnay one of the fathers of modern economics, first developed the analytical concept of inter-industry relationships in 1758. The concept was actualized into input-output analysis by Wassily Leontief during the Second World War, an accomplishment for which he received the 1973 Nobel Prize in Economics.

Input-Output analysis is an econometric technique used to examine the relationships within an economy. It captures all monetary market transactions for consumption in a given period and for a specific geography. The IMPLAN model uses data from many different sources – as published government data series, unpublished data, sets of relationships, ratios, or as estimates. The Minnesota IMPLAN group gathers this data, converts it into a consistent format, and estimates the missing components.

There are three different levels of data generally available in the United States: Federal, state and county. Most of the detailed data is available at the county level, and as such there are many issues with disclosure, especially in the case of smaller industries, such as brewing. IMPLAN overcomes these disclosure problems by combining a large number of datasets and by estimating those variables that are not found from any of them. The data is then converted into national input-output matrices (Use, Make, By-products, Absorption and Market Shares) as well as national tables for deflators, regional purchase coefficients and margins.

The IMPLAN Make matrix represents the production of commodities by industry. The Bureau of Economic Analysis (BEA) Benchmark I/O Study of the US Make Table forms the bases of the IMPLAN model. The Benchmark Make Table is updated to current year prices, and rearranged into the IMPLAN sector format. The IMPLAN Use matrix is based on estimates of final demand, value-added by sector and total industry and commodity output data as provided by government statistics or estimated by IMPLAN. The BEA Benchmark Use Table is then bridged to the IMPLAN sectors. Once the re-sectoring is complete, the Use Tables can be updated based on the other data and model calculations of interstate and international trade.

In the IMPLAN model, as with any input-output framework, all expenditures are in terms of producer prices. This allocates all expenditures to the industries that produce goods and services. As a result, all data not received in producer prices is converted using margins which are derived from the BEA Input-Output model. Margins represent the difference between producer and consumer prices. As such, the margins for any good add to one. If, for example, 10 percent of the consumer price of lodging is from the purchase of electricity, then the electricity margin would be 0.1.

Deflators, which account for relative price changes during different time periods, are derived from the Bureau of Labor Statistics (BLS) Growth Model. The 224 sector BLS model is mapped to the 528 sectors of the IMPLAN model. Where data are missing, deflators from BEA's Survey of Current Businesses are used.

¹⁵ This section is paraphrased from IMPLAN Professional: Users Guide, Analysis Guide, Data Guide, Version 2.0, MIG, Inc., June 2000.

Finally, one of the most important parts of the IMPLAN model, the Regional Purchase Coefficients (RPCs) must be derived. IMPLAN is derived from a national model, which represents the “average” condition for a particular industry. Since national production functions do not necessarily represent particular regional differences, adjustments need to be made. Regional trade flows are estimated based on the Multi-Regional Input-Output Accounts, a cross-sectional database with consistent cross interstate trade flows developed in 1977. These data are updated and bridged to the 528 sector IMPLAN model. Once the databases and matrices are created, they go through an extensive validation process. IMPLAN builds separate state and county models and evaluates them, checking to ensure that no ratios are outside of recognized bounds. The final datasets and matrices are not released before extensive testing takes place.

Appendix Results for Allegheny County

A separate analysis was performed for each of the distinct geographic areas in Pittsburgh and its countryside. With a population of 1.2 million, Allegheny County is the largest in Southwestern Pennsylvania. Home to the city of Pittsburgh, Allegheny County contains 53 percent of the jobs in the region. Based on our surveys of motorcoach companies, 56 percent of bus tourism spending in the region occurs in Allegheny County.

Based on these spending patterns, and business locations throughout the 12 county region, Guerrilla Economics, estimates that about 540 of the 897 direct jobs created by motorcoach tourism are located in Allegheny County. Spending by motorcoach operators and tourists in this county generated nearly \$14.8 million in direct economic activity, and almost \$10 million in compensation to employees.

Direct Impact of Motorcoach Tourism in Allegheny County

Industry	Employment	Value Added	Compensation
Total Impact	535.9	\$ 14,781,690	\$ 9,655,624
General merchandise stores	152.8	\$ 5,836,091	\$ 3,446,066
Food services and drinking places	137.5	\$ 3,129,214	\$ 2,145,860
Performing arts companies	130.4	\$ 1,599,784	\$ 1,192,647
Hotels and motels- including casino hotels	56.5	\$ 2,689,697	\$ 1,385,043
Museums- historical sites- zoos- and parks	35.1	\$ 826,135	\$ 1,011,337
Transit and ground passenger transportation	23.5	\$ 695,212	\$ 472,476
Other personal services	0.1	\$ 5,556	\$ 2,195

In addition to the direct economic impact of motorcoach tourism in Allegheny County, suppliers to the industry generated over \$1.1 million in economic activity and about 20 additional jobs.

Supplier Impact of Motorcoach Tourism in Allegheny County

Industry	Employment	Value Added	Compensation
Total Impact	20.0	\$ 1,136,024	\$ 626,072
Food services and drinking places	2.9	\$ 65,174	\$ 44,693
Wholesale trade	2.7	\$ 319,370	\$ 171,674
Promoters of performing arts and sports and agents	2.5	\$ 52,315	\$ 21,360
Performing arts companies	1.5	\$ 17,874	\$ 13,325
Independent artists- writers- and performers	1.3	\$ 25,069	\$ 16,618
Truck transportation	1.3	\$ 79,765	\$ 48,297
Maintenance and repair of nonresidential buildings	1.0	\$ 54,146	\$ 37,783
Real estate	0.7	\$ 99,114	\$ 10,045
Other State and local government enterprises	0.5	\$ 33,123	\$ 28,631
Spectator sports	0.5	\$ 26,839	\$ 18,619
Management consulting services	0.3	\$ 27,567	\$ 19,953
General merchandise stores	0.3	\$ 10,614	\$ 6,268
Hotels and motels- including casino hotels	0.3	\$ 13,570	\$ 6,988
Warehousing and storage	0.3	\$ 18,264	\$ 12,028
Newspaper publishers	0.2	\$ 15,063	\$ 10,189
Nondepository credit intermediation and related a	0.2	\$ 38,056	\$ 20,162
Drycleaning and laundry services	0.2	\$ 6,665	\$ 4,386
Investigation and security services	0.2	\$ 5,760	\$ 4,578
Miscellaneous store retailers	0.2	\$ 4,318	\$ 2,531
Food and beverage stores	0.2	\$ 7,657	\$ 4,507
Other Industries	2.8	215,701.9	123,437.5

Induced Impact of Motorcoach Tourism in Allegheny County

Industry	Employment	Value Added	Compensation
Total Impact	47.9	\$ 2,685,025	\$ 1,216,357
Food services and drinking places	13.3	\$ 303,762	\$ 208,305
Private households	3.3	\$ 35,335	\$ 20,048
Wholesale trade	3.2	\$ 372,689	\$ 200,336
General merchandise stores	2.8	\$ 107,398	\$ 63,416
Miscellaneous store retailers	1.9	\$ 41,811	\$ 24,504
Personal care services	1.9	\$ 54,718	\$ 32,253
Food and beverage stores	1.9	\$ 75,647	\$ 44,529
Nonstore retailers	1.6	\$ 76,225	\$ 30,272
Clothing and clothing accessories stores	1.5	\$ 61,276	\$ 32,034
Hospitals	1.4	\$ 77,360	\$ 72,497
Motor vehicle and parts dealers	1.3	\$ 91,241	\$ 52,999
Other amusement- gambling- and recreation industri	1.1	\$ 40,869	\$ 20,931
Truck transportation	1.0	\$ 62,393	\$ 37,778
Gasoline stations	0.9	\$ 37,882	\$ 17,395
Sporting goods- hobby- book and music stores	0.8	\$ 27,571	\$ 15,626
Fitness and recreational sports centers	0.7	\$ 16,960	\$ 12,354
Building material and garden supply stores	0.7	\$ 39,866	\$ 22,412
Health and personal care stores	0.7	\$ 33,303	\$ 19,709
Performing arts companies	0.7	\$ 7,847	\$ 5,850
Other State and local government enterprises	0.7	\$ 39,764	\$ 34,371
Other Industries	6.7	1,081,108.4	248,738.5

Finally, about 50 jobs and \$2.7 million in economic activity was generated from the re-spending by employees in the direct and supplier sectors of the economy. In sum, motorcoach tourism was responsible for \$18.6 million in economic activity in Allegheny County, generating about 600 jobs. The most dependent sectors in Allegheny County were retailers, restaurants and bars, the performing arts, and lodging places.

Total Impact of Motorcoach Tourism in Allegheny County

Industry	Employment	Value Added	Compensation
Total Impact	603.8	\$ 18,602,738	\$ 11,498,053
General merchandise stores	155.9	\$ 5,954,103	\$ 3,515,750
Food services and drinking places	153.7	\$ 3,498,150	\$ 2,398,857
Performing arts companies	132.5	\$ 1,625,505	\$ 1,211,822
Hotels and motels- including casino hotels	57.4	\$ 2,731,468	\$ 1,406,553
Museums- historical sites- zoos- and parks	35.3	\$ 830,013	\$ 1,016,085
Transit and ground passenger transportation	23.5	\$ 697,317	\$ 473,907
Wholesale trade	5.9	\$ 692,059	\$ 372,010
Private households	3.3	\$ 35,335	\$ 20,048
Promoters of performing arts and sports and agents	3.0	\$ 63,274	\$ 25,835
Truck transportation	2.3	\$ 142,158	\$ 86,076
Miscellaneous store retailers	2.1	\$ 46,128	\$ 27,035
Food and beverage stores	2.1	\$ 83,303	\$ 49,036
Personal care services	1.9	\$ 54,718	\$ 32,253
Nonstore retailers	1.7	\$ 83,751	\$ 33,261
Clothing and clothing accessories stores	1.7	\$ 67,501	\$ 35,288
Hospitals	1.4	\$ 77,360	\$ 72,497
Motor vehicle and parts dealers	1.4	\$ 100,241	\$ 58,226
Independent artists- writers- and performers	1.3	\$ 25,846	\$ 17,133
Maintenance and repair of nonresidential buildings	1.2	\$ 68,022	\$ 47,465
Other State and local government enterprises	1.2	\$ 72,887	\$ 63,002
Other Industries	15.1	1,653,598.4	535,914.3

Appendix Results for Armstrong County

A separate analysis was performed for each of the distinct geographic areas in Pittsburgh and its countryside. With a population of 70,586, Armstrong County is the 9th largest in Southwestern Pennsylvania. Home to more than 100,000 acres of private land for hunting, 113 public and private parks, 200 miles of trails and seven golf courses, Armstrong County contains 1.4 percent of the jobs in the region. Based on our surveys of motorcoach companies, 1.6 percent of bus tourism spending in the region occurs in Armstrong County.

Based on these spending patterns, and business locations throughout the 12 county region, Guerrilla Economics, estimates that about 11 of the 897 direct jobs created by motorcoach tourism are located in Armstrong County. Spending by motorcoach operators and tourists in this county generated nearly \$348,000 in direct economic activity, and over \$220,000 in compensation to employees.

Direct Impact of Motorcoach Tourism in Armstrong County

Industry	Employment	Value Added	Compensation
Total Impact	10.8	\$ 348,137	\$ 224,155
General merchandise stores	4.0	\$ 152,801	\$ 90,225
Food services and drinking places	3.6	\$ 81,929	\$ 56,183
Hotels and motels- including casino hotels	1.5	\$ 70,422	\$ 36,263
Museums- historical sites- zoos- and parks	0.9	\$ 22,328	\$ 27,333
Transit and ground passenger transportation	0.6	\$ 18,202	\$ 12,370
Performing arts companies	0.2	\$ 2,309	\$ 1,721
Other personal services	0.0	\$ 145	\$ 57

In addition to the direct economic impact of motorcoach tourism in Armstrong County, suppliers to the industry generated about \$53,000 in economic activity and about 1 additional job.

Supplier Impact of Motorcoach Tourism in Armstrong County

Industry	Employment	Value Added	Compensation
Total Impact	1.0	\$ 52,705	\$ 27,846
General merchandise stores	0.2	\$ 6,751	\$ 3,986
Wholesale trade	0.2	\$ 18,146	\$ 9,754
Miscellaneous store retailers	0.1	\$ 2,746	\$ 1,610
Clothing and clothing accessories stores	0.1	\$ 3,959	\$ 2,070
Drycleaning and laundry services	0.1	\$ 2,777	\$ 1,827
Independent artists- writers- and performers	0.1	\$ 1,286	\$ 852
Sporting goods- hobby- book and music stores	0.1	\$ 1,755	\$ 995
Gasoline stations	0.1	\$ 2,763	\$ 1,269
Food services and drinking places	0.1	\$ 1,207	\$ 828
Real estate	0.0	\$ 3,769	\$ 382
Cattle ranching and farming	0.0	\$ 147	\$ 90
Animal production- except cattle and poultry and e	0.0	\$ 68	\$ 54
Commercial printing	0.0	\$ 653	\$ 524
Nonstore retailers	0.0	\$ 517	\$ 205
Management consulting services	0.0	\$ 672	\$ 486
Hotels and motels- including casino hotels	0.0	\$ 342	\$ 176
All other crop farming	0.0	\$ 403	\$ 61
Food and beverage stores	0.0	\$ 202	\$ 119
Monetary authorities and depository credit interme	0.0	\$ 604	\$ 206
Motor vehicle and parts dealers	0.0	\$ 237	\$ 138
Other Industries	0.0	3,700.3	2,214.1

Induced Impact of Motorcoach Tourism in Armstrong County

Industry	Employment	Value Added	Compensation
Total Impact	5.9	\$ 227,604	\$ 124,670
General merchandise stores	1.8	\$ 68,310	\$ 40,335
Miscellaneous store retailers	1.2	\$ 26,593	\$ 15,586
Clothing and clothing accessories stores	1.0	\$ 38,974	\$ 20,375
Gasoline stations	0.6	\$ 23,668	\$ 10,868
Sporting goods- hobby- book and music stores	0.5	\$ 17,536	\$ 9,939
Food services and drinking places	0.2	\$ 5,625	\$ 3,857
Wholesale trade	0.2	\$ 21,176	\$ 11,383
Nonstore retailers	0.1	\$ 5,237	\$ 2,080
Drycleaning and laundry services	0.1	\$ 1,902	\$ 1,252
Food and beverage stores	0.0	\$ 1,996	\$ 1,175
Motor vehicle and parts dealers	0.0	\$ 2,408	\$ 1,399
Building material and garden supply stores	0.0	\$ 1,052	\$ 591
Health and personal care stores	0.0	\$ 879	\$ 520
Real estate	0.0	\$ 2,223	\$ 225
Hotels and motels- including casino hotels	0.0	\$ 712	\$ 366
Furniture and home furnishings stores	0.0	\$ 520	\$ 268
Pharmaceutical and medicine manufacturing	0.0	\$ 2,953	\$ 1,134
Cattle ranching and farming	0.0	\$ 60	\$ 37
Electronics and appliance stores	0.0	\$ 501	\$ 318
Monetary authorities and depository credit interme	0.0	\$ 1,026	\$ 350
Other Industries	0.1	4,253.6	2,612.6

Finally, about 6 jobs and \$228,000 in economic activity were generated by the re-spending by the employees in the direct and supplier sectors of the economy. In sum, motorcoach tourism was responsible for \$628,500 in economic activity in Armstrong County, generating about 18 jobs. The most impacted sectors in Armstrong County were retailers, restaurants and bars, and lodging places.

Total Impact of Motorcoach Tourism in Armstrong County

Industry	Employment	Value Added	Compensation
Total Impact	17.7	\$ 628,446	\$ 376,671
General merchandise stores	6.0	\$ 227,862	\$ 134,547
Food services and drinking places	3.9	\$ 88,762	\$ 60,868
Hotels and motels- including casino hotels	1.5	\$ 71,476	\$ 36,806
Miscellaneous store retailers	1.3	\$ 29,340	\$ 17,195
Clothing and clothing accessories stores	1.1	\$ 42,933	\$ 22,445
Museums- historical sites- zoos- and parks	1.0	\$ 22,433	\$ 27,462
Gasoline stations	0.6	\$ 26,431	\$ 12,137
Transit and ground passenger transportation	0.6	\$ 18,202	\$ 12,370
Sporting goods- hobby- book and music stores	0.6	\$ 19,291	\$ 10,934
Wholesale trade	0.3	\$ 39,322	\$ 21,137
Performing arts companies	0.2	\$ 2,309	\$ 1,721
Drycleaning and laundry services	0.1	\$ 4,679	\$ 3,079
Nonstore retailers	0.1	\$ 5,754	\$ 2,285
Independent artists- writers- and performers	0.1	\$ 1,325	\$ 879
Food and beverage stores	0.1	\$ 2,198	\$ 1,294
Real estate	0.0	\$ 5,992	\$ 607
Motor vehicle and parts dealers	0.0	\$ 2,645	\$ 1,536
Cattle ranching and farming	0.0	\$ 207	\$ 127
Building material and garden supply stores	0.0	\$ 1,156	\$ 650
Health and personal care stores	0.0	\$ 970	\$ 574
Other Industries	0.2	15,158.7	8,017.2

Appendix Results for Beaver County

A separate analysis was performed for each of the distinct geographic areas in Pittsburgh and its countryside. With a population of 177,400, Beaver County is the 5th largest in Southwestern Pennsylvania. Home to dozens of cultural events and ethnic festivals held throughout the year, as well as the BeaveRun MotorSports Complex, Beaver County contains 3.9 percent of the jobs in the region. Based on our surveys of motorcoach companies, 1.1 percent of bus tourism spending in the region occurs in Beaver County.

Based on these spending patterns, and business locations throughout the 12 county region, Guerrilla Economics, estimates that about 9 of the 897 direct jobs created by motorcoach tourism are located in Beaver County. Spending by motorcoach operators and tourists in this county generated nearly \$276,000 in direct economic activity, and almost \$190,000 in compensation to employees.

Direct Impact of Motorcoach Tourism in Beaver County

Industry	Employment	Value Added	Compensation
Total Impact	8.8	\$ 276,417	\$ 189,135
General merchandise stores	3.0	\$ 112,882	\$ 66,654
Food services and drinking places	2.7	\$ 60,526	\$ 41,505
Museums- historical sites- zoos- and parks	1.5	\$ 35,725	\$ 43,734
Hotels and motels- including casino hotels	1.1	\$ 52,024	\$ 26,790
Transit and ground passenger transportation	0.5	\$ 13,447	\$ 9,139
Performing arts companies	0.1	\$ 1,706	\$ 1,272
Other personal services	0.0	\$ 107	\$ 42

In addition to the direct economic impact of motorcoach tourism in Beaver County, suppliers to the industry generated over \$1.1 million in economic activity and about 20 additional jobs.

Supplier Impact of Motorcoach Tourism in Beaver County

Industry	Employment	Value Added	Compensation
Total Impact	1.9	\$ 462,587	\$ 134,778
Power generation and supply	0.8	\$ 394,548	\$ 97,542
Transit and ground passenger transportation	0.2	\$ 7,554	\$ 5,134
Drycleaning and laundry services	0.2	\$ 5,554	\$ 3,655
Wholesale trade	0.1	\$ 14,517	\$ 7,803
Hotels and motels- including casino hotels	0.1	\$ 3,681	\$ 1,896
Food and beverage stores	0.1	\$ 2,547	\$ 1,499
Rail transportation	0.1	\$ 8,768	\$ 4,962
Motor vehicle and parts dealers	0.0	\$ 2,993	\$ 1,739
Real estate	0.0	\$ 5,211	\$ 528
Building material and garden supply stores	0.0	\$ 1,312	\$ 738
Health and personal care stores	0.0	\$ 1,151	\$ 681
Other amusement- gambling- and recreation industri	0.0	\$ 1,209	\$ 619
Furniture and home furnishings stores	0.0	\$ 843	\$ 434
Cattle ranching and farming	0.0	\$ 105	\$ 64
Fitness and recreational sports centers	0.0	\$ 255	\$ 186
Radio and television broadcasting	0.0	\$ 750	\$ 554
Electronic equipment repair and maintenance	0.0	\$ 676	\$ 353
Electronics and appliance stores	0.0	\$ 712	\$ 452
Car washes	0.0	\$ 250	\$ 99
Spectator sports	0.0	\$ 403	\$ 280
Other Industries	0.1	9,548.1	5,560.8

Induced Impact of Motorcoach Tourism in Beaver County

Industry	Employment	Value Added	Compensation
Total Impact	5.1	\$ 591,187	\$ 249,755
Offices of physicians- dentists- and other health	1.4	\$ 113,472	\$ 77,908
Food and beverage stores	0.6	\$ 25,160	\$ 14,810
Other amusement- gambling- and recreation industri	0.6	\$ 23,692	\$ 12,134
Power generation and supply	0.6	\$ 303,836	\$ 75,116
Motor vehicle and parts dealers	0.4	\$ 30,347	\$ 17,627
Building material and garden supply stores	0.2	\$ 13,259	\$ 7,454
Health and personal care stores	0.2	\$ 11,077	\$ 6,555
Hotels and motels- including casino hotels	0.2	\$ 7,651	\$ 3,940
Wholesale trade	0.1	\$ 16,940	\$ 9,106
Transit and ground passenger transportation	0.1	\$ 4,024	\$ 2,735
Drycleaning and laundry services	0.1	\$ 3,805	\$ 2,504
Furniture and home furnishings stores	0.1	\$ 6,556	\$ 3,377
Electronics and appliance stores	0.1	\$ 6,316	\$ 4,006
Fitness and recreational sports centers	0.1	\$ 1,202	\$ 876
Video tape and disc rental	0.0	\$ 1,298	\$ 434
Rail transportation	0.0	\$ 5,567	\$ 3,151
Nonstore retailers	0.0	\$ 1,164	\$ 462
Real estate	0.0	\$ 3,072	\$ 311
Civic- social- professional and similar organizati	0.0	\$ 573	\$ 563
Other ambulatory health care services	0.0	\$ 962	\$ 695
Other Industries	0.1	11,213.7	5,991.8

Finally, about 5 jobs and \$590,000 in economic activity were generated by the re-spending by the employees in the direct and supplier sectors of the economy. In sum, motorcoach tourism was responsible for \$1.3 million in economic activity in Beaver County, generating about 16 jobs. The most impacted sectors in Beaver County were retailers, restaurants and bars, museums and historical sights, and power generation.

Total Impact of Motorcoach Tourism in Beaver County

Industry	Employment	Value Added	Compensation
Total Impact	15.8	\$ 1,330,191	\$ 573,669
General merchandise stores	3.0	\$ 112,882	\$ 66,654
Food services and drinking places	2.7	\$ 60,526	\$ 41,505
Museums- historical sites- zoos- and parks	1.5	\$ 35,892	\$ 43,939
Power generation and supply	1.4	\$ 698,383	\$ 172,657
Offices of physicians- dentists- and other health	1.4	\$ 113,472	\$ 77,908
Hotels and motels- including casino hotels	1.3	\$ 63,357	\$ 32,625
Transit and ground passenger transportation	0.8	\$ 25,024	\$ 17,007
Food and beverage stores	0.7	\$ 27,707	\$ 16,309
Other amusement- gambling- and recreation industri	0.6	\$ 24,901	\$ 12,753
Motor vehicle and parts dealers	0.5	\$ 33,340	\$ 19,366
Drycleaning and laundry services	0.3	\$ 9,359	\$ 6,158
Wholesale trade	0.3	\$ 31,457	\$ 16,910
Building material and garden supply stores	0.3	\$ 14,572	\$ 8,192
Health and personal care stores	0.3	\$ 12,228	\$ 7,237
Performing arts companies	0.1	\$ 1,802	\$ 1,344
Furniture and home furnishings stores	0.1	\$ 7,399	\$ 3,811
Electronics and appliance stores	0.1	\$ 7,028	\$ 4,458
Rail transportation	0.1	\$ 14,336	\$ 8,113
Fitness and recreational sports centers	0.1	\$ 1,457	\$ 1,061
Real estate	0.1	\$ 8,283	\$ 839
Other Industries	0.3	26,785.8	14,821.4

Appendix Results for Butler County

A separate analysis was performed for each of the distinct geographic areas in Pittsburgh and its countryside. With a population of 182,000, Butler County is the 4th largest in Southwestern Pennsylvania. Home to historical sites, cultural events and regional festivals, plus accommodations to suit campers, business travelers or bed & breakfast romantics, Butler County contains 6.3 percent of the jobs in the region. Based on our surveys of motorcoach companies, 1.4 percent of bus tourism spending in the region occurs in Butler County.

Based on these spending patterns, and business locations throughout the 12 county region, Guerrilla Economics, estimates that about 9 of the 897 direct jobs created by motorcoach tourism are located in Butler County. Spending by motorcoach operators and tourists in this county generated over \$303,000 in direct economic activity, and \$183,000 in compensation to employees.

Direct Impact of Motorcoach Tourism in Butler County

Industry	Employment	Value Added	Compensation
Total Impact	9.2	\$ 303,083	\$ 183,092
General merchandise stores	3.7	\$ 142,143	\$ 83,932
Food services and drinking places	3.3	\$ 76,215	\$ 52,264
Hotels and motels- including casino hotels	1.4	\$ 65,510	\$ 33,734
Transit and ground passenger transportation	0.6	\$ 16,932	\$ 11,508
Performing arts companies	0.2	\$ 2,148	\$ 1,601
Other personal services	0.0	\$ 135	\$ 53
Wholesale trade	-	\$ -	\$ -

In addition to the direct economic impact of motorcoach tourism in Butler County, suppliers to the industry generated almost \$350,000 in economic activity and about 4 additional jobs.

Supplier Impact of Motorcoach Tourism in Butler County

Industry	Employment	Value Added	Compensation
Total Impact	3.9	\$ 349,207	\$ 186,721
Wholesale trade	2.4	\$ 286,707	\$ 154,117
Independent artists- writers- and performers	0.4	\$ 7,456	\$ 4,943
Performing arts companies	0.2	\$ 2,946	\$ 2,196
Transit and ground passenger transportation	0.1	\$ 4,120	\$ 2,800
All other crop farming	0.1	\$ 4,915	\$ 747
Real estate	0.1	\$ 8,426	\$ 854
Cattle ranching and farming	0.1	\$ 420	\$ 258
Food and beverage stores	0.0	\$ 1,907	\$ 1,122
Air transportation	0.0	\$ 7,141	\$ 4,313
Animal production- except cattle and poultry and e	0.0	\$ 203	\$ 162
Hotels and motels- including casino hotels	0.0	\$ 1,926	\$ 992
Motor vehicle and parts dealers	0.0	\$ 2,241	\$ 1,302
Other State and local government enterprises	0.0	\$ 2,070	\$ 1,789
Building material and garden supply stores	0.0	\$ 983	\$ 552
Health and personal care stores	0.0	\$ 862	\$ 510
Fitness and recreational sports centers	0.0	\$ 490	\$ 357
General merchandise stores	0.0	\$ 701	\$ 414
Furniture and home furnishings stores	0.0	\$ 631	\$ 325
Commercial machinery repair and maintenance	0.0	\$ 740	\$ 378
Miscellaneous store retailers	0.0	\$ 285	\$ 167
Other Industries	0.2	14,036.0	8,423.3

Induced Impact of Motorcoach Tourism in Butler County

Industry	Employment	Value Added	Compensation
Total Impact	5.8	\$ 515,591	\$ 268,752
Wholesale trade	2.8	\$ 334,573	\$ 179,847
Food and beverage stores	0.5	\$ 18,839	\$ 11,089
Motor vehicle and parts dealers	0.3	\$ 22,723	\$ 13,199
Hospitals	0.2	\$ 11,051	\$ 10,357
General merchandise stores	0.2	\$ 7,097	\$ 4,190
Building material and garden supply stores	0.2	\$ 9,928	\$ 5,581
Health and personal care stores	0.2	\$ 8,294	\$ 4,908
Miscellaneous store retailers	0.1	\$ 2,763	\$ 1,619
Performing arts companies	0.1	\$ 1,293	\$ 964
Clothing and clothing accessories stores	0.1	\$ 4,049	\$ 2,117
Fitness and recreational sports centers	0.1	\$ 2,308	\$ 1,681
Air transportation	0.1	\$ 11,277	\$ 6,810
Hotels and motels- including casino hotels	0.1	\$ 4,003	\$ 2,061
Furniture and home furnishings stores	0.1	\$ 4,909	\$ 2,528
Electronics and appliance stores	0.1	\$ 4,729	\$ 3,000
Transit and ground passenger transportation	0.1	\$ 2,195	\$ 1,492
Gasoline stations	0.1	\$ 2,459	\$ 1,129
Sporting goods- hobby- book and music stores	0.1	\$ 1,822	\$ 1,033
Other State and local government enterprises	0.0	\$ 2,485	\$ 2,148
Nonstore retailers	0.0	\$ 1,746	\$ 693
Other Industries	0.4	57,050.0	12,305.1

Finally, about 6 jobs and \$516,000 in economic activity were generated by the re-spending by the employees in the direct and supplier sectors of the economy. In sum, motorcoach tourism was responsible for \$1.16 million in economic activity in Butler County, generating about 19 jobs. The most impacted sectors in Butler County were wholesalers, retailers, restaurants and bars, and lodging places.

Total Impact of Motorcoach Tourism in Butler County

Industry	Employment	Value Added	Compensation
Total Impact	18.8	\$ 1,167,881	\$ 638,565
Wholesale trade	5.3	\$ 621,280	\$ 333,963
General merchandise stores	3.9	\$ 149,941	\$ 88,536
Food services and drinking places	3.3	\$ 76,215	\$ 52,264
Hotels and motels- including casino hotels	1.5	\$ 71,439	\$ 36,787
Transit and ground passenger transportation	0.8	\$ 23,248	\$ 15,799
Performing arts companies	0.5	\$ 6,387	\$ 4,761
Food and beverage stores	0.5	\$ 20,746	\$ 12,212
Independent artists- writers- and performers	0.4	\$ 7,688	\$ 5,096
Motor vehicle and parts dealers	0.3	\$ 24,964	\$ 14,501
Hospitals	0.2	\$ 11,051	\$ 10,357
Building material and garden supply stores	0.2	\$ 10,911	\$ 6,134
Health and personal care stores	0.2	\$ 9,156	\$ 5,418
Miscellaneous store retailers	0.1	\$ 3,048	\$ 1,786
Air transportation	0.1	\$ 18,418	\$ 11,123
Fitness and recreational sports centers	0.1	\$ 2,797	\$ 2,038
Clothing and clothing accessories stores	0.1	\$ 4,460	\$ 2,332
All other crop farming	0.1	\$ 7,176	\$ 1,091
Furniture and home furnishings stores	0.1	\$ 5,540	\$ 2,853
Real estate	0.1	\$ 13,394	\$ 1,357
Electronics and appliance stores	0.1	\$ 5,262	\$ 3,338
Other Industries	0.8	74,761.4	26,817.7

Appendix Results for Greene County

A separate analysis was performed for each of the distinct geographic areas in Pittsburgh and its countryside. With a population of 39,800, Greene County is the smallest in Southwestern Pennsylvania. Home to beautiful rural farms, steep wooded hillsides teeming with game and recreational opportunities, Greene County contains 0.7 percent of the jobs in the region. Based on our surveys of motorcoach companies, 0.9 percent of bus tourism spending in the region occurs in Greene County.

Based on these spending patterns, and business locations throughout the 12 county region, Guerrilla Economics, estimates that about 7 of the 897 direct jobs created by motorcoach tourism are located in Greene County. Spending by motorcoach operators and tourists in this county generated nearly \$218,000 in direct economic activity, and over \$144,000 million in compensation to employees.

Direct Impact of Motorcoach Tourism in Greene County

Industry	Employment	Value Added	Compensation
Total Impact	6.9	\$ 217,831	\$ 144,052
General merchandise stores	2.4	\$ 92,736	\$ 54,758
Food services and drinking places	2.2	\$ 49,724	\$ 34,098
Hotels and motels- including casino hotels	0.9	\$ 42,740	\$ 22,008
Museums- historical sites- zoos- and parks	0.9	\$ 20,095	\$ 24,600
Transit and ground passenger transportation	0.4	\$ 11,047	\$ 7,508
Performing arts companies	0.1	\$ 1,401	\$ 1,045
Other personal services	0.0	\$ 88	\$ 35

In addition to the direct economic impact of motorcoach tourism in Greene County, suppliers to the industry generated over \$3,200 in economic activity.

Supplier Impact of Motorcoach Tourism in Greene County

Industry	Employment	Value Added	Compensation
Total Impact	0.1	\$ 3,226	\$ 1,751
Management consulting services	0.0	\$ 1,080	\$ 781
Hotels and motels- including casino hotels	0.0	\$ 257	\$ 132
All other crop farming	0.0	\$ 338	\$ 51
Car washes	0.0	\$ 130	\$ 52
Animal production- except cattle and poultry and e	0.0	\$ 18	\$ 15
Real estate	0.0	\$ 222	\$ 22
General merchandise stores	0.0	\$ 53	\$ 31
Truck transportation	0.0	\$ 85	\$ 52
Radio and television broadcasting	0.0	\$ 100	\$ 74
Environmental and other technical consulting servi	0.0	\$ 86	\$ 49
Vegetable and melon farming	0.0	\$ 53	\$ 11
Food and beverage stores	0.0	\$ 42	\$ 25
Miscellaneous store retailers	0.0	\$ 21	\$ 13
Cattle ranching and farming	0.0	\$ 7	\$ 4
Civic- social- professional and similar organizati	0.0	\$ 23	\$ 23
Computer systems design services	0.0	\$ 51	\$ 47
Motor vehicle and parts dealers	0.0	\$ 49	\$ 29
Clothing and clothing accessories stores	0.0	\$ 31	\$ 16
Other amusement- gambling- and recreation industri	0.0	\$ 30	\$ 15
Agriculture and forestry support activities	0.0	\$ 10	\$ 8
Other Industries	0.0	\$ 539	\$ 303

Induced Impact of Motorcoach Tourism in Greene County

Industry	Employment	Value Added	Compensation
Total Impact	0.1	\$ 8,194	\$ 3,635
Video tape and disc rental	0.0	\$ 1,088	\$ 364
Other amusement- gambling- and recreation industri	0.0	\$ 592	\$ 303
General merchandise stores	0.0	\$ 531	\$ 314
Hotels and motels- including casino hotels	0.0	\$ 534	\$ 275
Food and beverage stores	0.0	\$ 416	\$ 245
Miscellaneous store retailers	0.0	\$ 207	\$ 121
Clothing and clothing accessories stores	0.0	\$ 303	\$ 158
Motor vehicle and parts dealers	0.0	\$ 502	\$ 291
Management consulting services	0.0	\$ 407	\$ 295
Gasoline stations	0.0	\$ 184	\$ 85
Car washes	0.0	\$ 132	\$ 52
Building material and garden supply stores	0.0	\$ 219	\$ 123
Sporting goods- hobby- book and music stores	0.0	\$ 136	\$ 77
Health and personal care stores	0.0	\$ 183	\$ 108
Civic- social- professional and similar organizati	0.0	\$ 98	\$ 96
Museums- historical sites- zoos- and parks	0.0	\$ 94	\$ 115
All other crop farming	0.0	\$ 156	\$ 24
Mattress manufacturing	0.0	\$ 68	\$ 44
Furniture and home furnishings stores	0.0	\$ 108	\$ 56
Electronics and appliance stores	0.0	\$ 104	\$ 66
Other Industries	0.0	\$ 2,130	\$ 421

Finally, about \$8,000 in economic activity were generated by the re-spending by the employees in the direct and supplier sectors of the economy. In sum, motorcoach tourism was responsible for \$229,000 in economic activity in Greene County, generating about 7 jobs. The most impacted sectors in Greene County were retailers, and restaurants and bars.

Total Impact of Motorcoach Tourism in Greene County

Industry	Employment	Value Added	Compensation
Total Impact	7.1	\$ 229,251	\$ 149,438
General merchandise stores	2.4	\$ 93,320	\$ 55,103
Food services and drinking places	2.2	\$ 49,724	\$ 34,098
Hotels and motels- including casino hotels	0.9	\$ 43,530	\$ 22,416
Museums- historical sites- zoos- and parks	0.9	\$ 20,190	\$ 24,716
Transit and ground passenger transportation	0.4	\$ 11,047	\$ 7,508
Performing arts companies	0.1	\$ 1,401	\$ 1,045
Video tape and disc rental	0.0	\$ 1,094	\$ 365
Management consulting services	0.0	\$ 1,487	\$ 1,076
Other amusement- gambling- and recreation industri	0.0	\$ 623	\$ 319
Food and beverage stores	0.0	\$ 458	\$ 270
Miscellaneous store retailers	0.0	\$ 228	\$ 134
Car washes	0.0	\$ 262	\$ 104
Clothing and clothing accessories stores	0.0	\$ 334	\$ 175
Motor vehicle and parts dealers	0.0	\$ 551	\$ 320
All other crop farming	0.0	\$ 494	\$ 75
Animal production- except cattle and poultry and e	0.0	\$ 25	\$ 20
Gasoline stations	0.0	\$ 206	\$ 94
Building material and garden supply stores	0.0	\$ 241	\$ 135
Sporting goods- hobby- book and music stores	0.0	\$ 150	\$ 85
Health and personal care stores	0.0	\$ 202	\$ 120
Other Industries	0.0	\$ 3,686	\$ 1,262

Appendix Results for Indiana County

A separate analysis was performed for each of the distinct geographic areas in Pittsburgh and its countryside. With a population of 88,700, Indiana County is the 8th largest in Southwestern Pennsylvania. Nestled in the foothills of the Allegheny Mountains, Indiana contains 2.9 percent of the jobs in the region. Based on our surveys of motorcoach companies, 2.8 percent of bus tourism spending in the region occurs in Indiana County.

Based on these spending patterns, and business locations throughout the 12 county region, Guerrilla Economics, estimates that about 20 of the 897 direct jobs created by motorcoach tourism are located in Indiana County. Spending by motorcoach operators and tourists in this county generated nearly \$640,000 in direct economic activity, and over \$400,000 in compensation to employees.

Direct Impact of Motorcoach Tourism in Indiana County

Industry	Employment	Value Added	Compensation
Total Impact	19.7	\$ 639,467	\$ 400,146
General merchandise stores	7.6	\$ 289,432	\$ 170,902
Food services and drinking places	6.8	\$ 155,188	\$ 106,421
Hotels and motels- including casino hotels	2.8	\$ 133,391	\$ 68,689
Transit and ground passenger transportation	1.2	\$ 34,478	\$ 23,432
Museums- historical sites- zoos- and parks	0.9	\$ 22,328	\$ 27,333
Performing arts companies	0.4	\$ 4,374	\$ 3,261
Other personal services	0.0	\$ 276	\$ 109

In addition to the direct economic impact of motorcoach tourism in Indiana County, suppliers to the industry generated over \$27,000 in economic activity and about 1 additional job.

Supplier Impact of Motorcoach Tourism in Indiana County

Industry	Employment	Value Added	Compensation
Total Impact	0.6	\$ 27,201	\$ 14,553
Drycleaning and laundry services	0.1	\$ 2,777	\$ 1,827
Independent artists- writers- and performers	0.1	\$ 1,286	\$ 852
Management consulting services	0.1	\$ 5,134	\$ 3,716
Food services and drinking places	0.1	\$ 1,207	\$ 828
Animal production- except cattle and poultry and e	0.0	\$ 203	\$ 162
Food and beverage stores	0.0	\$ 1,212	\$ 714
Cattle ranching and farming	0.0	\$ 231	\$ 142
All other crop farming	0.0	\$ 2,079	\$ 316
Real estate	0.0	\$ 3,326	\$ 337
Motor vehicle and parts dealers	0.0	\$ 1,425	\$ 828
Building material and garden supply stores	0.0	\$ 625	\$ 351
Health and personal care stores	0.0	\$ 548	\$ 324
Spectator sports	0.0	\$ 496	\$ 344
Furniture and home furnishings stores	0.0	\$ 401	\$ 207
Hotels and motels- including casino hotels	0.0	\$ 428	\$ 220
Radio and television broadcasting	0.0	\$ 567	\$ 418
Agriculture and forestry support activities	0.0	\$ 105	\$ 83
Performing arts companies	0.0	\$ 67	\$ 50
Electronics and appliance stores	0.0	\$ 339	\$ 215
Commercial printing	0.0	\$ 258	\$ 206
Other Industries	0.0	\$ 4,488	\$ 2,413

Induced Impact of Motorcoach Tourism in Indiana County

Industry	Employment	Value Added	Compensation
Total Impact	1.4	\$ 66,986	\$ 38,162
Food and beverage stores	0.3	\$ 11,977	\$ 7,050
Food services and drinking places	0.2	\$ 5,625	\$ 3,857
Motor vehicle and parts dealers	0.2	\$ 14,446	\$ 8,391
Building material and garden supply stores	0.1	\$ 6,312	\$ 3,548
Health and personal care stores	0.1	\$ 5,273	\$ 3,120
Other amusement- gambling- and recreation industri	0.1	\$ 2,369	\$ 1,213
Drycleaning and laundry services	0.1	\$ 1,902	\$ 1,252
Furniture and home furnishings stores	0.1	\$ 3,121	\$ 1,607
Electronics and appliance stores	0.0	\$ 3,007	\$ 1,907
Management consulting services	0.0	\$ 1,938	\$ 1,402
Hotels and motels- including casino hotels	0.0	\$ 890	\$ 458
Animal production- except cattle and poultry and e	0.0	\$ 72	\$ 57
All other crop farming	0.0	\$ 956	\$ 145
Real estate	0.0	\$ 1,961	\$ 199
Cattle ranching and farming	0.0	\$ 95	\$ 58
General merchandise stores	0.0	\$ 455	\$ 269
Spectator sports	0.0	\$ 445	\$ 309
Miscellaneous store retailers	0.0	\$ 177	\$ 104
Clothing and clothing accessories stores	0.0	\$ 260	\$ 136
Fitness and recreational sports centers	0.0	\$ 144	\$ 105
Other Industries	0.1	\$ 5,560	\$ 2,971

Finally, about 2 jobs and \$67,000 in economic activity were generated by the re-spending by the employees in the direct and supplier sectors of the economy. In sum, motorcoach tourism was responsible for \$733,600 in economic activity in Indiana County, generating about 22 jobs. The most impacted sectors in Indiana County were retailers, restaurants and bars, and lodging places.

Total Impact of Motorcoach Tourism in Indiana County

Industry	Employment	Value Added	Compensation
Total Impact	21.6	\$ 733,653	\$ 452,862
General merchandise stores	7.6	\$ 289,932	\$ 171,198
Food services and drinking places	7.1	\$ 162,021	\$ 111,106
Hotels and motels- including casino hotels	2.8	\$ 134,709	\$ 69,368
Transit and ground passenger transportation	1.2	\$ 34,478	\$ 23,432
Museums- historical sites- zoos- and parks	1.0	\$ 22,433	\$ 27,462
Performing arts companies	0.4	\$ 4,470	\$ 3,333
Food and beverage stores	0.3	\$ 13,189	\$ 7,764
Motor vehicle and parts dealers	0.2	\$ 15,871	\$ 9,219
Drycleaning and laundry services	0.1	\$ 4,679	\$ 3,079
Building material and garden supply stores	0.1	\$ 6,937	\$ 3,900
Health and personal care stores	0.1	\$ 5,821	\$ 3,445
Management consulting services	0.1	\$ 7,072	\$ 5,119
Independent artists- writers- and performers	0.1	\$ 1,325	\$ 879
Other amusement- gambling- and recreation industri	0.1	\$ 2,490	\$ 1,275
Furniture and home furnishings stores	0.1	\$ 3,522	\$ 1,814
Animal production- except cattle and poultry and e	0.1	\$ 275	\$ 219
Electronics and appliance stores	0.1	\$ 3,346	\$ 2,122
All other crop farming	0.0	\$ 3,035	\$ 461
Cattle ranching and farming	0.0	\$ 325	\$ 200
Real estate	0.0	\$ 5,287	\$ 536
Other Industries	0.1	\$ 12,435	\$ 6,933

Appendix Results for The Laurel Highlands

A separate analysis was performed for each of the distinct geographic areas in Pittsburgh and its countryside. With a combined population of 592,700 million, the three counties that make up the Laurel Highlands represent the 2nd largest area in Southwestern Pennsylvania. Home to historic roads and villages and natural parks and some of the nation's leading architectural masterpieces, the Laurel Highlands contain 18.6 percent of the jobs in the region. Based on our surveys of motorcoach companies, 29.5 percent of bus tourism spending in the region occurs in the Laurel Highlands.

Based on these spending patterns, and business locations throughout the 12 county region, Guerrilla Economics, estimates that about 207 of the 897 direct jobs created by motorcoach tourism are located in the Laurel Highlands. Spending by motorcoach operators and tourists in this county generated nearly \$8.8 million in direct economic activity, and almost \$4.2 million in compensation to employees.

Direct Impact of Motorcoach Tourism in The Laurel Highlands

Industry	Employment	Value Added	Compensation
Total Impact	207.4	\$ 6,761,912	\$ 4,197,011
General merchandise stores	80.8	\$ 3,086,446	\$ 1,822,470
Food services and drinking places	72.7	\$ 1,654,901	\$ 1,134,849
Hotels and motels- including casino hotels	29.9	\$ 1,422,460	\$ 732,487
Transit and ground passenger transportation	12.4	\$ 367,666	\$ 249,871
Museums- historical sites- zoos- and parks	7.7	\$ 180,857	\$ 221,401
Performing arts companies	3.8	\$ 46,643	\$ 34,772
Other personal services	0.1	\$ 2,938	\$ 1,161

In addition to the direct economic impact of motorcoach tourism in the Laurel Highlands, suppliers to the industry generated almost \$422,000 million in economic activity and about 8 additional jobs.

Supplier Impact of Motorcoach Tourism in The Laurel Highlands

Industry	Employment	Value Added	Compensation
Total Impact	7.5	\$ 421,733	\$ 254,490
Food services and drinking places	0.9	\$ 20,518	\$ 14,070
Independent artists- writers- and performers	0.9	\$ 16,584	\$ 10,993
Warehousing and storage	0.8	\$ 52,510	\$ 34,580
Newspaper publishers	0.7	\$ 43,763	\$ 29,603
Postal service	0.4	\$ 30,129	\$ 30,754
Performing arts companies	0.4	\$ 4,753	\$ 3,543
Couriers and messengers	0.4	\$ 21,518	\$ 14,009
Scenic and sightseeing transportation and support	0.3	\$ 25,106	\$ 11,503
Other personal services	0.3	\$ 15,745	\$ 6,219
Real estate	0.2	\$ 24,612	\$ 2,494
Hotels and motels- including casino hotels	0.2	\$ 8,219	\$ 4,232
Other State and local government enterprises	0.2	\$ 10,351	\$ 8,947
Food and beverage stores	0.2	\$ 6,158	\$ 3,625
Drycleaning and laundry services	0.1	\$ 4,998	\$ 3,289
Motor vehicle and parts dealers	0.1	\$ 7,239	\$ 4,205
Truck transportation	0.1	\$ 6,509	\$ 3,941
Management consulting services	0.1	\$ 7,630	\$ 5,522
Spectator sports	0.1	\$ 5,021	\$ 3,483
General merchandise stores	0.1	\$ 2,828	\$ 1,670
Natural gas distribution	0.1	\$ 15,776	\$ 6,149
Other Industries	1.2	91,767.3	51,656.7

Induced Impact of Motorcoach Tourism in The Laurel Highlands

Industry	Employment	Value Added	Compensation
Total Impact	16.9	\$ 798,483	\$ 473,577
Food services and drinking places	4.2	\$ 95,629	\$ 65,577
Food and beverage stores	1.5	\$ 60,842	\$ 35,814
Motor vehicle and parts dealers	1.0	\$ 73,384	\$ 42,626
General merchandise stores	0.8	\$ 28,614	\$ 16,896
Other amusement- gambling- and recreation industri	0.7	\$ 28,431	\$ 14,561
Building material and garden supply stores	0.6	\$ 32,064	\$ 18,025
Health and personal care stores	0.6	\$ 26,785	\$ 15,852
Nonstore retailers	0.5	\$ 25,602	\$ 10,168
Miscellaneous store retailers	0.5	\$ 11,140	\$ 6,529
Other personal services	0.5	\$ 28,820	\$ 11,382
Hospitals	0.4	\$ 22,103	\$ 20,713
Clothing and clothing accessories stores	0.4	\$ 16,326	\$ 8,535
Home health care services	0.4	\$ 15,106	\$ 11,260
Hotels and motels- including casino hotels	0.4	\$ 17,081	\$ 8,796
Warehousing and storage	0.3	\$ 22,160	\$ 14,594
Offices of physicians- dentists- and other health	0.3	\$ 28,368	\$ 19,477
Furniture and home furnishings stores	0.3	\$ 15,854	\$ 8,166
Gasoline stations	0.2	\$ 9,993	\$ 4,589
Electronics and appliance stores	0.2	\$ 15,273	\$ 9,687
Other ambulatory health care services	0.2	\$ 12,984	\$ 9,380
Other Industries	2.8	211,925.0	120,949.8

Finally, about 17 jobs and \$800,000 in economic activity were generated by the re-spending by the employees in the direct and supplier sectors of the economy. In sum, motorcoach tourism was responsible for \$8 million in economic activity in the Laurel Highlands, generating about 232 jobs. The most impacted sectors in the Laurel Highlands were retailers, restaurants and bars, lodging places and transportation companies.

Total Impact of Motorcoach Tourism in The Laurel Highlands

Industry	Employment	Value Added	Compensation
Total Impact	231.7	\$ 7,982,127	\$ 4,925,079
General merchandise stores	81.6	\$ 3,117,888	\$ 1,841,036
Food services and drinking places	77.8	\$ 1,771,047	\$ 1,214,496
Hotels and motels- including casino hotels	30.4	\$ 1,447,760	\$ 745,515
Transit and ground passenger transportation	12.4	\$ 367,666	\$ 249,871
Museums- historical sites- zoos- and parks	7.7	\$ 181,706	\$ 222,440
Performing arts companies	4.4	\$ 53,483	\$ 39,871
Food and beverage stores	1.7	\$ 67,000	\$ 39,439
Motor vehicle and parts dealers	1.1	\$ 80,623	\$ 46,831
Warehousing and storage	1.1	\$ 74,670	\$ 49,174
Newspaper publishers	0.9	\$ 56,334	\$ 38,107
Independent artists- writers- and performers	0.9	\$ 17,098	\$ 11,334
Other personal services	0.8	\$ 47,503	\$ 18,762
Other amusement- gambling- and recreation industri	0.8	\$ 29,881	\$ 15,304
Building material and garden supply stores	0.6	\$ 35,237	\$ 19,809
Health and personal care stores	0.6	\$ 29,570	\$ 17,499
Postal service	0.6	\$ 44,329	\$ 45,250
Nonstore retailers	0.6	\$ 28,130	\$ 11,172
Miscellaneous store retailers	0.6	\$ 12,290	\$ 7,203
Couriers and messengers	0.5	\$ 29,742	\$ 19,363
Scenic and sightseeing transportation and support	0.5	\$ 41,481	\$ 19,006
Other Industries	6.1	448,688.3	253,595.7

Appendix Results for Lawrence County

A separate analysis was performed for each of the distinct geographic areas in Pittsburgh and its countryside. With a population of 92,800, Lawrence County is the 7th largest in Southwestern Pennsylvania. Home to historic covered bridges, a ruggedly beautiful state park and two sects of Old-Order Amish, Lawrence County contains 2.8 percent of the jobs in the region. Based on our surveys of motorcoach companies, 3 percent of bus tourism spending in the region occurs in Lawrence County.

Based on these spending patterns, and business locations throughout the 12 county region, Guerrilla Economics, estimates that about 33 of the 897 direct jobs created by motorcoach tourism are located in Lawrence County. Spending by motorcoach operators and tourists in this county generated over \$821,000 in direct economic activity, and almost \$518,000 in compensation to employees.

Direct Impact of Motorcoach Tourism in Lawrence County

Industry	Employment	Value Added	Compensation
Total Impact	32.8	\$ 821,283	\$ 517,841
Performing arts companies	12.9	\$ 158,227	\$ 117,959
General merchandise stores	8.2	\$ 313,186	\$ 184,929
Food services and drinking places	7.4	\$ 167,925	\$ 115,155
Hotels and motels- including casino hotels	3.0	\$ 144,339	\$ 74,327
Transit and ground passenger transportation	1.3	\$ 37,308	\$ 25,355
Other personal services	0.0	\$ 298	\$ 118
Drycleaning and laundry services	-	\$ -	\$ -

In addition to the direct economic impact of motorcoach tourism in Lawrence County, suppliers to the industry generated over \$47,300 in economic activity and about 1 additional job.

Supplier Impact of Motorcoach Tourism in Lawrence County

Industry	Employment	Value Added	Compensation
Total Impact	1.1	\$ 47,328	\$ 29,263
Drycleaning and laundry services	0.5	\$ 17,217	\$ 11,330
Independent artists- writers- and performers	0.3	\$ 4,885	\$ 3,238
Warehousing and storage	0.1	\$ 5,708	\$ 3,759
Wholesale trade	0.1	\$ 7,258	\$ 3,902
Cattle ranching and farming	0.0	\$ 266	\$ 163
Food and beverage stores	0.0	\$ 1,309	\$ 771
Motor vehicle and parts dealers	0.0	\$ 1,539	\$ 894
Building material and garden supply stores	0.0	\$ 675	\$ 379
Health and personal care stores	0.0	\$ 592	\$ 350
Furniture and home furnishings stores	0.0	\$ 433	\$ 223
Animal production- except cattle and poultry and e	0.0	\$ 37	\$ 29
Scientific research and development services	0.0	\$ 481	\$ 389
Other computer related services- including facilit	0.0	\$ 780	\$ 422
Electronics and appliance stores	0.0	\$ 366	\$ 232
Real estate	0.0	\$ 665	\$ 67
Hotels and motels- including casino hotels	0.0	\$ 171	\$ 88
Architectural and engineering services	0.0	\$ 208	\$ 160
Civic- social- professional and similar organizati	0.0	\$ 80	\$ 79
General merchandise stores	0.0	\$ 98	\$ 58
Nondepository credit intermediation and related a	0.0	\$ 406	\$ 215
Other Industries	0.0	4,154.5	2,515.3

Induced Impact of Motorcoach Tourism in Lawrence County

Industry	Employment	Value Added	Compensation
Total Impact	1.5	\$ 83,834	\$ 47,789
Drycleaning and laundry services	0.3	\$ 11,795	\$ 7,762
Food and beverage stores	0.3	\$ 12,934	\$ 7,613
Motor vehicle and parts dealers	0.2	\$ 15,600	\$ 9,061
Building material and garden supply stores	0.1	\$ 6,816	\$ 3,832
Health and personal care stores	0.1	\$ 5,694	\$ 3,370
Wholesale trade	0.1	\$ 8,470	\$ 4,553
Furniture and home furnishings stores	0.1	\$ 3,370	\$ 1,736
Electronics and appliance stores	0.1	\$ 3,247	\$ 2,059
Home health care services	0.0	\$ 1,678	\$ 1,251
Warehousing and storage	0.0	\$ 2,409	\$ 1,586
General merchandise stores	0.0	\$ 987	\$ 583
Miscellaneous store retailers	0.0	\$ 384	\$ 225
Cattle ranching and farming	0.0	\$ 109	\$ 67
Clothing and clothing accessories stores	0.0	\$ 563	\$ 294
Civic- social- professional and similar organizati	0.0	\$ 335	\$ 329
Gasoline stations	0.0	\$ 342	\$ 157
Child day care services	0.0	\$ 192	\$ 123
Independent artists- writers- and performers	0.0	\$ 151	\$ 100
Hotels and motels- including casino hotels	0.0	\$ 356	\$ 183
Sporting goods- hobby- book and music stores	0.0	\$ 253	\$ 144
Other Industries	0.0	8,149.2	2,760.9

Finally, about 1.5 jobs and \$84,000 in economic activity were generated by the re-spending by the employees in the direct and supplier sectors of the economy. In sum, motorcoach tourism was responsible for \$952,500 in economic activity in Lawrence County, generating about 35 jobs. The most impacted sectors in Lawrence County were the arts, retailers, and restaurants and bars.

Total Impact of Motorcoach Tourism in Lawrence County

Industry	Employment	Value Added	Compensation
Total Impact	35.4	\$ 952,445	\$ 594,894
Performing arts companies	12.9	\$ 158,227	\$ 117,959
General merchandise stores	8.2	\$ 314,270	\$ 185,569
Food services and drinking places	7.4	\$ 167,925	\$ 115,155
Hotels and motels- including casino hotels	3.0	\$ 144,866	\$ 74,598
Transit and ground passenger transportation	1.3	\$ 37,308	\$ 25,355
Drycleaning and laundry services	0.8	\$ 29,012	\$ 19,091
Food and beverage stores	0.4	\$ 14,243	\$ 8,384
Independent artists- writers- and performers	0.3	\$ 5,037	\$ 3,339
Motor vehicle and parts dealers	0.2	\$ 17,139	\$ 9,955
Building material and garden supply stores	0.1	\$ 7,491	\$ 4,211
Wholesale trade	0.1	\$ 15,729	\$ 8,455
Health and personal care stores	0.1	\$ 6,286	\$ 3,720
Warehousing and storage	0.1	\$ 8,116	\$ 5,345
Furniture and home furnishings stores	0.1	\$ 3,804	\$ 1,959
Electronics and appliance stores	0.1	\$ 3,613	\$ 2,292
Cattle ranching and farming	0.0	\$ 375	\$ 230
Home health care services	0.0	\$ 1,678	\$ 1,251
Miscellaneous store retailers	0.0	\$ 424	\$ 248
Clothing and clothing accessories stores	0.0	\$ 620	\$ 324
Civic- social- professional and similar organizati	0.0	\$ 415	\$ 408
Other Industries	0.1	15,869.0	7,046.4

Appendix Results for Mercer County

A separate analysis was performed for each of the distinct geographic areas in Pittsburgh and its countryside. With a population of 119,600, Mercer County is the 6th largest in Southwestern Pennsylvania. Home to exciting shops include Prime Outlets and Reyers, the world's largest shoe store, Mercer County contains 4.3 percent of the jobs in the region. Based on our surveys of motorcoach companies, 3.5 percent of bus tourism spending in the region occurs in Mercer County.

Based on these spending patterns, and business locations throughout the 12 county region, Guerrilla Economics, estimates that about 44 of the 897 direct jobs created by motorcoach tourism are located in Mercer County. Spending by motorcoach operators and tourists in this county generated over \$1.2 million in direct economic activity, and almost \$750,000 in compensation to employees.

Direct Impact of Motorcoach Tourism in Mercer County

Industry	Employment	Value Added	Compensation
Total Impact	43.4	\$ 1,210,315	\$ 748,922
General merchandise stores	16.9	\$ 645,052	\$ 380,887
Performing arts companies	12.9	\$ 158,227	\$ 117,959
Food services and drinking places	8.6	\$ 195,363	\$ 133,970
Hotels and motels- including casino hotels	3.5	\$ 167,923	\$ 86,471
Transit and ground passenger transportation	1.5	\$ 43,403	\$ 29,498
Other personal services	0.0	\$ 347	\$ 137
Food and beverage stores	-	\$ -	\$ -

In addition to the direct economic impact of motorcoach tourism in Mercer County, suppliers to the industry generated over \$73,000 in economic activity and about 2 additional jobs.

Supplier Impact of Motorcoach Tourism in Mercer County

Industry	Employment	Value Added	Compensation
Total Impact	1.8	\$ 73,407	\$ 55,437
Transit and ground passenger transportation	0.3	\$ 9,614	\$ 6,534
State and local government passenger transit	0.3	\$ 1,591	\$ 14,313
Food services and drinking places	0.3	\$ 6,035	\$ 4,138
Food and beverage stores	0.1	\$ 5,392	\$ 3,174
Truck transportation	0.1	\$ 6,636	\$ 4,018
Motor vehicle and parts dealers	0.1	\$ 6,338	\$ 3,681
Independent artists- writers- and performers	0.1	\$ 1,157	\$ 767
Building material and garden supply stores	0.1	\$ 2,779	\$ 1,562
Health and personal care stores	0.1	\$ 2,438	\$ 1,443
Other personal services	0.1	\$ 3,149	\$ 1,244
Furniture and home furnishings stores	0.0	\$ 1,785	\$ 919
Cattle ranching and farming	0.0	\$ 287	\$ 176
Real estate	0.0	\$ 4,989	\$ 506
Commercial printing	0.0	\$ 1,847	\$ 1,480
Management consulting services	0.0	\$ 2,543	\$ 1,841
Radio and television broadcasting	0.0	\$ 2,183	\$ 1,612
Electronics and appliance stores	0.0	\$ 1,508	\$ 956
Animal production- except cattle and poultry and e	0.0	\$ 80	\$ 64
Hotels and motels- including casino hotels	0.0	\$ 728	\$ 375
Fluid milk manufacturing	0.0	\$ 665	\$ 534
Other Industries	0.1	11,663.2	6,099.4

Induced Impact of Motorcoach Tourism in Mercer County

Industry	Employment	Value Added	Compensation
Total Impact	5.9	\$ 279,999	\$ 167,902
Food and beverage stores	1.3	\$ 53,273	\$ 31,359
Food services and drinking places	1.2	\$ 28,126	\$ 19,287
Motor vehicle and parts dealers	0.9	\$ 64,255	\$ 37,323
Building material and garden supply stores	0.5	\$ 28,075	\$ 15,783
Health and personal care stores	0.5	\$ 23,453	\$ 13,880
Furniture and home furnishings stores	0.2	\$ 13,882	\$ 7,150
Electronics and appliance stores	0.2	\$ 13,373	\$ 8,482
Transit and ground passenger transportation	0.2	\$ 5,121	\$ 3,480
State and local government passenger transit	0.1	\$ 847	\$ 7,624
Other personal services	0.1	\$ 5,764	\$ 2,276
Truck transportation	0.1	\$ 5,191	\$ 3,143
Nonstore retailers	0.1	\$ 3,491	\$ 1,386
General merchandise stores	0.1	\$ 2,656	\$ 1,569
Miscellaneous store retailers	0.0	\$ 1,034	\$ 606
Clothing and clothing accessories stores	0.0	\$ 1,516	\$ 792
Hotels and motels- including casino hotels	0.0	\$ 1,512	\$ 779
Pharmaceutical and medicine manufacturing	0.0	\$ 8,859	\$ 3,402
Gasoline stations	0.0	\$ 920	\$ 423
Real estate	0.0	\$ 2,942	\$ 298
Sporting goods- hobby- book and music stores	0.0	\$ 682	\$ 387
Other Industries	0.2	15,024.9	8,472.0

Finally, about 6 jobs and \$280,000 in economic activity were generated by the re-spending by the employees in the direct and supplier sectors of the economy. In sum, motorcoach tourism was responsible for \$1.56 million in economic activity in Mercer County, generating about 50 jobs. The most impacted sectors in Mercer County were retailers, the arts, and restaurants and bars.

Total Impact of Motorcoach Tourism in Mercer County

Industry	Employment	Value Added	Compensation
Total Impact	51.1	\$ 1,563,720	\$ 972,260
General merchandise stores	17.0	\$ 647,971	\$ 382,611
Performing arts companies	12.9	\$ 158,227	\$ 117,959
Food services and drinking places	10.1	\$ 229,524	\$ 157,396
Hotels and motels- including casino hotels	3.6	\$ 170,163	\$ 87,625
Transit and ground passenger transportation	1.9	\$ 58,139	\$ 39,512
Food and beverage stores	1.5	\$ 58,665	\$ 34,533
Motor vehicle and parts dealers	1.0	\$ 70,593	\$ 41,005
Building material and garden supply stores	0.6	\$ 30,854	\$ 17,345
Health and personal care stores	0.5	\$ 25,891	\$ 15,322
State and local government passenger transit	0.4	\$ 2,438	\$ 21,937
Furniture and home furnishings stores	0.3	\$ 15,667	\$ 8,069
Electronics and appliance stores	0.2	\$ 14,881	\$ 9,439
Truck transportation	0.2	\$ 11,828	\$ 7,162
Other personal services	0.2	\$ 9,260	\$ 3,657
Nonstore retailers	0.1	\$ 3,836	\$ 1,523
Independent artists- writers- and performers	0.1	\$ 1,193	\$ 791
Real estate	0.1	\$ 7,930	\$ 804
Cattle ranching and farming	0.1	\$ 404	\$ 248
Miscellaneous store retailers	0.1	\$ 1,141	\$ 669
Management consulting services	0.0	\$ 3,503	\$ 2,535
Other Industries	0.4	41,613.7	22,119.3

Appendix Results for Washington County

A separate analysis was performed for each of the distinct geographic areas in Pittsburgh and its countryside. With a population of 206,400, Washington County is the 3rd largest in Southwestern Pennsylvania. Home to 22 covered bridges and the scenic National Road, Washington County contains 6 percent of the jobs in the region. Based on our surveys of motorcoach companies, just under 1 percent of bus tourism spending in the region occurs in Washington County.

Based on these spending patterns, and business locations throughout the 12 county region, Guerrilla Economics, estimates that about 22 of the 897 direct jobs created by motorcoach tourism are located in Washington County. Spending by motorcoach operators and tourists in this county generated nearly \$424,000 in direct economic activity, and almost \$340,000 in compensation to employees.

Direct Impact of Motorcoach Tourism in Washington County

Industry	Employment	Value Added	Compensation
Total Impact	22.1	\$ 423,805	\$ 337,757
Performing arts companies	12.9	\$ 158,227	\$ 117,959
Museums- historical sites- zoos- and parks	4.1	\$ 96,010	\$ 117,534
General merchandise stores	2.1	\$ 80,093	\$ 47,293
Food services and drinking places	1.9	\$ 42,945	\$ 29,449
Hotels and motels- including casino hotels	0.8	\$ 36,913	\$ 19,008
Transit and ground passenger transportation	0.3	\$ 9,541	\$ 6,484
Other personal services	0.0	\$ 76	\$ 30

In addition to the direct economic impact of motorcoach tourism in Washington County, suppliers to the industry generated almost \$88,000 in economic activity and about 3 additional jobs.

Supplier Impact of Motorcoach Tourism in Washington County

Industry	Employment	Value Added	Compensation
Total Impact	2.6	\$ 87,890	\$ 66,885
Transit and ground passenger transportation	0.6	\$ 17,168	\$ 11,668
Food services and drinking places	0.4	\$ 9,655	\$ 6,621
Independent artists- writers- and performers	0.4	\$ 8,099	\$ 5,369
State and local government passenger transit	0.3	\$ 1,790	\$ 16,102
Management consulting services	0.1	\$ 9,717	\$ 7,033
Performing arts companies	0.1	\$ 1,406	\$ 1,048
Other personal services	0.1	\$ 5,248	\$ 2,073
Car washes	0.0	\$ 1,303	\$ 516
Real estate	0.0	\$ 6,319	\$ 640
Animal production- except cattle and poultry and e	0.0	\$ 185	\$ 147
Food and beverage stores	0.0	\$ 1,553	\$ 914
Commercial printing	0.0	\$ 2,124	\$ 1,702
Wholesale trade	0.0	\$ 3,629	\$ 1,951
Motor vehicle and parts dealers	0.0	\$ 1,826	\$ 1,060
Building material and garden supply stores	0.0	\$ 800	\$ 450
Health and personal care stores	0.0	\$ 702	\$ 416
Drycleaning and laundry services	0.0	\$ 555	\$ 365
Cattle ranching and farming	0.0	\$ 126	\$ 77
Hotels and motels- including casino hotels	0.0	\$ 685	\$ 353
General merchandise stores	0.0	\$ 416	\$ 246
Other Industries	0.2	14,582.5	8,133.4

Induced Impact of Motorcoach Tourism in Washington County

Industry	Employment	Value Added	Compensation
Total Impact	4.6	\$ 170,392	\$ 109,209
Food services and drinking places	2.0	\$ 45,002	\$ 30,860
Food and beverage stores	0.4	\$ 15,346	\$ 9,033
Transit and ground passenger transportation	0.3	\$ 9,145	\$ 6,215
Motor vehicle and parts dealers	0.3	\$ 18,509	\$ 10,751
State and local government passenger transit	0.2	\$ 953	\$ 8,577
Other personal services	0.2	\$ 9,607	\$ 3,794
Building material and garden supply stores	0.1	\$ 8,087	\$ 4,546
Health and personal care stores	0.1	\$ 6,756	\$ 3,998
General merchandise stores	0.1	\$ 4,212	\$ 2,487
Child day care services	0.1	\$ 1,915	\$ 1,227
Miscellaneous store retailers	0.1	\$ 1,640	\$ 961
Furniture and home furnishings stores	0.1	\$ 3,999	\$ 2,060
Electronics and appliance stores	0.1	\$ 3,852	\$ 2,443
Nonstore retailers	0.1	\$ 2,909	\$ 1,155
Clothing and clothing accessories stores	0.1	\$ 2,403	\$ 1,256
Performing arts companies	0.1	\$ 617	\$ 460
Nursing and residential care facilities	0.0	\$ 1,740	\$ 1,440
Car washes	0.0	\$ 1,321	\$ 523
Management consulting services	0.0	\$ 3,667	\$ 2,654
Gasoline stations	0.0	\$ 1,460	\$ 670
Other Industries	0.4	27,252.4	14,096.9

Finally, about 5 jobs and \$170,400 in economic activity were generated by the re-spending by the employees in the direct and supplier sectors of the economy. In sum, motorcoach tourism was responsible for \$682,000 in economic activity in Washington County, generating about 30 jobs. The most impacted sectors in Washington County were artists, restaurants and bars, and museums.

Total Impact of Motorcoach Tourism in Washington County

Industry	Employment	Value Added	Compensation
Total Impact	29.2	\$ 682,087	\$ 513,852
Performing arts companies	13.1	\$ 160,250	\$ 119,467
Food services and drinking places	4.3	\$ 97,602	\$ 66,930
Museums- historical sites- zoos- and parks	4.1	\$ 96,461	\$ 118,086
General merchandise stores	2.2	\$ 84,722	\$ 50,026
Transit and ground passenger transportation	1.2	\$ 35,854	\$ 24,367
Hotels and motels- including casino hotels	0.8	\$ 39,021	\$ 20,094
State and local government passenger transit	0.5	\$ 2,743	\$ 24,679
Independent artists- writers- and performers	0.4	\$ 8,350	\$ 5,535
Food and beverage stores	0.4	\$ 16,899	\$ 9,947
Motor vehicle and parts dealers	0.3	\$ 20,335	\$ 11,812
Other personal services	0.2	\$ 14,931	\$ 5,897
Building material and garden supply stores	0.2	\$ 8,888	\$ 4,996
Management consulting services	0.2	\$ 13,384	\$ 9,687
Health and personal care stores	0.2	\$ 7,458	\$ 4,414
Car washes	0.1	\$ 2,624	\$ 1,040
Miscellaneous store retailers	0.1	\$ 1,809	\$ 1,060
Furniture and home furnishings stores	0.1	\$ 4,513	\$ 2,324
Child day care services	0.1	\$ 1,915	\$ 1,227
Real estate	0.1	\$ 10,045	\$ 1,018
Wholesale trade	0.1	\$ 7,864	\$ 4,227
Other Industries	0.8	46,419.5	27,017.7

Appendix Results for Pittsburgh

A separate analysis was performed for each of the distinct geographic areas in Pittsburgh and its countryside. With a population of 316,718, the City of Pittsburgh is the hub of the Southwestern Pennsylvania region.

Based on these spending patterns, and business locations throughout the 12 county region, Guerrilla Economics, estimates that about 339 of the 897 direct jobs created by motorcoach tourism are located in Pittsburgh. Spending by motorcoach operators and tourists in this county generated nearly \$9.55 million in direct economic activity, and almost \$6.2 million in compensation to employees.

Direct Impact of Motorcoach Tourism in Pittsburgh

Industry	Employment	Value Added	Compensation
Total Impact	339.0	\$ 9,545,836	\$ 6,183,509
Food services and drinking places	95.9	\$ 2,183,253	\$ 1,497,166
General merchandise stores	82.2	\$ 3,139,817	\$ 1,853,984
Performing arts companies	72.5	\$ 889,320	\$ 662,992
Hotels and motels- including casino hotels	46.8	\$ 2,229,221	\$ 1,147,924
Museums- historical sites- zoos- and parks	21.3	\$ 500,291	\$ 612,446
Transit and ground passenger transportation	20.2	\$ 598,856	\$ 406,991
Other personal services	0.1	\$ 5,079	\$ 2,006

In addition to the direct economic impact of motorcoach tourism in Pittsburgh, suppliers to the industry generated over \$440,000 in economic activity and about 8 additional jobs.

Supplier Impact of Motorcoach Tourism in Pittsburgh

Industry	Employment	Value Added	Compensation
Total Impact	7.6	\$ 441,256	\$ 239,625
Promoters of performing arts and sports and agents	1.2	\$ 25,990	\$ 10,612
Truck transportation	1.0	\$ 62,749	\$ 37,994
Maintenance and repair of nonresidential buildings	1.0	\$ 54,146	\$ 37,783
Food services and drinking places	0.8	\$ 18,064	\$ 12,387
Real estate	0.4	\$ 63,600	\$ 6,446
Performing arts companies	0.3	\$ 3,687	\$ 2,749
Newspaper publishers	0.2	\$ 13,123	\$ 8,877
Management consulting services	0.2	\$ 17,414	\$ 12,604
Other State and local government enterprises	0.2	\$ 13,118	\$ 11,339
Independent artists- writers- and performers	0.2	\$ 3,729	\$ 2,472
Nondepository credit intermediation	0.2	\$ 25,594	\$ 13,560
Investigation and security services	0.1	\$ 4,369	\$ 3,472
Architectural and engineering services	0.1	\$ 9,096	\$ 6,983
Spectator sports	0.1	\$ 5,846	\$ 4,055
Meat processed from carcasses	0.1	\$ 6,050	\$ 4,706
Poultry processing	0.1	\$ 5,488	\$ 3,199
Animal- except poultry- slaughtering	0.1	\$ 4,046	\$ 3,539
Food and beverage stores	0.1	\$ 2,942	\$ 1,732
Computer systems design services	0.1	\$ 4,756	\$ 4,314
Monetary authorities and depository credit interme	0.1	\$ 10,185	\$ 3,474
Other Industries	1.0	87,265.3	47,329.5

Induced Impact of Motorcoach Tourism in Pittsburgh

Industry	Employment	Value Added	Compensation
Total Impact	14.3	\$ 1,086,553	\$ 361,166
Food services and drinking places	3.7	\$ 84,192	\$ 57,735
Private households	2.0	\$ 21,931	\$ 12,443
Hospitals	0.8	\$ 42,179	\$ 39,528
Truck transportation	0.8	\$ 49,083	\$ 29,719
Food and beverage stores	0.7	\$ 29,069	\$ 17,111
Motor vehicle and parts dealers	0.5	\$ 35,062	\$ 20,366
Child day care services	0.3	\$ 8,750	\$ 5,606
Other amusement- gambling- and recreation industri	0.3	\$ 11,451	\$ 5,864
General merchandise stores	0.3	\$ 10,962	\$ 6,473
Building material and garden supply stores	0.3	\$ 15,320	\$ 8,612
Real estate	0.3	\$ 37,499	\$ 3,800
Health and personal care stores	0.3	\$ 12,798	\$ 7,574
Other State and local government enterprises	0.3	\$ 15,748	\$ 13,612
Maintenance and repair of nonresidential buildings	0.3	\$ 13,876	\$ 9,683
Nonstore retailers	0.3	\$ 12,267	\$ 4,872
Promoters of performing arts and sports and agents	0.2	\$ 5,445	\$ 2,223
Fitness and recreational sports centers	0.2	\$ 4,916	\$ 3,581
Other ambulatory health care services	0.2	\$ 11,496	\$ 8,305
Miscellaneous store retailers	0.2	\$ 4,267	\$ 2,501
Clothing and clothing accessories stores	0.2	\$ 6,254	\$ 3,270
Other Industries	2.3	653,988.5	98,287.2

Finally, about 14 jobs and \$1.1 million in economic activity were generated by the re-spending by the employees in the direct and supplier sectors of the economy. In sum, motorcoach tourism was responsible for over \$11 million in economic activity in Pittsburgh, generating about 360 jobs. The most impacted sectors in Pittsburgh were restaurants and bars, retailers and artists.

Total Impact of Motorcoach Tourism in Pittsburgh

Industry	Employment	Value Added	Compensation
Total Impact	360.9	\$ 11,073,645	\$ 6,784,299
Food services and drinking places	100.4	\$ 2,285,509	\$ 1,567,289
General merchandise stores	82.5	\$ 3,151,862	\$ 1,861,096
Performing arts companies	72.9	\$ 894,625	\$ 666,948
Hotels and motels- including casino hotels	47.0	\$ 2,235,193	\$ 1,150,999
Museums- historical sites- zoos- and parks	21.3	\$ 500,547	\$ 612,759
Transit and ground passenger transportation	20.2	\$ 598,856	\$ 406,991
Private households	2.0	\$ 21,931	\$ 12,443
Truck transportation	1.8	\$ 111,831	\$ 67,713
Promoters of performing arts and sports and agents	1.5	\$ 31,434	\$ 12,835
Maintenance and repair of nonresidential buildings	1.2	\$ 68,022	\$ 47,465
Food and beverage stores	0.8	\$ 32,011	\$ 18,843
Hospitals	0.8	\$ 42,179	\$ 39,528
Real estate	0.7	\$ 101,099	\$ 10,246
Motor vehicle and parts dealers	0.5	\$ 38,520	\$ 22,375
Other State and local government enterprises	0.5	\$ 28,866	\$ 24,951
Child day care services	0.3	\$ 8,750	\$ 5,606
Other amusement- gambling- and recreation industri	0.3	\$ 12,035	\$ 6,164
Building material and garden supply stores	0.3	\$ 16,836	\$ 9,465
Health and personal care stores	0.3	\$ 14,128	\$ 8,361
Management consulting services	0.3	\$ 23,985	\$ 17,360
All Other Industries	5.3	\$ 855,425	\$ 214,862