

Northern Tier Workforce Investment Area

Bradford, Sullivan, Susquehanna, Tioga, and Wyoming Counties

Tourism

Arts, Entertainment, and Recreation & Accommodation and Food Services

Top 5 Employing Industries

72.4% of Cluster Jobs

- Full-service restaurants
- Limited-service restaurants
- Hotels and motels, except casino hotels
- Drinking places, alcoholic beverages
- Independent artists, writers, and performers

Other Industries Included in the Tourism Cluster³

- Golf courses and country clubs
- Food service contractors
- Skiing facilities
- Snack and nonalcoholic beverage bars
- Fitness and recreational sports centers
- Sports teams and clubs
- Racetracks
- Caterers
- Rooming and boarding houses
- Bowling centers

(1) Number of individual establishments or physical locations of a certain economic activity.

(2) Location Quotient (LQ) is a statistical measure that compares the concentration of employment in a local industry cluster to the concentration of employment in the same cluster statewide or nationally. An LQ of greater than 1.0 suggests that a locale has a competitive advantage within a cluster and is producing goods or services in excess of the local consumption, thus resulting in exportation of goods or services. An LQ of less than one suggests that an industry is falling behind local demand and is importing the good or service.

(3) Not all industries may be present in each individual county.

Cluster Statistics

Based on the North American Industrial Classification System (NAICS)	Northern Tier
Employer Units ¹	421
Number of Jobs	5,627
Projected Net Change in Job Volume	112
Projected Percent Change in Job Volume	2.0%
Percent of Total Region Jobs	6.8%
Current Industry Earnings	\$13,537
Estimated Cluster Payroll	\$76,172,699
State Location Quotient ²	0.83
Projected Change in State Location Quotient	0.00
National Location Quotient ²	0.75
Projected Change in National Location Quotient	-0.01

Number of Jobs by County

Bradford	1,723
Sullivan	249
Susquehanna	1,401
Tioga	1,569
Wyoming	685

Five Most Common Occupations and Median Hourly Wages

Combined food preparation and serving workers, including fast food	\$7.27
Waiters and waitresses	\$7.48
Cooks, restaurant	\$8.11
Bartenders	\$7.36
First-line supervisors/managers of food preparation and serving workers	\$12.32

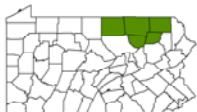
Competitive Industries by National LQ

Individual industries could demonstrate a high LQ due to the uniqueness of the business's primary function rather than competitiveness factors

Skiing facilities	9.61
Bed-and-breakfast inns	3.11
RV parks and campgrounds	2.98
Rooming and boarding houses	2.64
Mobile food services	2.44

Source: Economic Modeling Specialists, Incorporated Complete Employment-1st Quarter 2010
Changes in employment and location quotients based on projections for the 2010-2015 time period
Establishments based on 2008 estimates

Industry earnings include benefits. Occupational wages do not include benefits



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Economic Impact

Through the use of an input-output model, Economic Modeling Specialists, Incorporated is able to measure the economic impact that an industry has on a region. The impact is demonstrated through multipliers that are generated by studying the relationships between industries. Multipliers measure how important an industry is to other industries in the region, often referred to as "ripple effects." Ripple effects are measured by increasing or decreasing the employment in a single industry or grouping of industries and analyzing how that impacts all other industries. **To determine the economic impact that tourism has on the Northern Tier Region, each scenario is based on adding 100 jobs to the top employing Tourism industries, which allows better insight to which industries are important to the local economy.** The resulting multipliers are based on the direct and indirect effects of each scenario in the region only; they do not include any potential impacts that may occur in surrounding counties with businesses that may also be impacted.

Jobs Multiplier: A jobs multiplier indicates how important an industry is in regional job creation. A jobs multiplier of 3, for example, would mean that for every job created by that industry, 2 other jobs would be created in other industries (for a total of 3 jobs) throughout the region.

Earnings Multiplier: An earnings multiplier of 1.5 means that for every dollar of earnings generated by an industry gaining employment, a total of \$1.50 is paid out in wages, salaries, and other compensation throughout the local economy. This is important for understanding how a given scenario will effect not the number of jobs in the region, but the quality of those jobs.

Sales Multiplier: Sales multipliers show how "deeply-rooted" an industry is in the region. This shows how a single dollar fed into an industry from the outside propagates through the regional economy. For example, a sales multiplier of 2.8 means that a dollar of sales led to a total of \$2.80 in regional sales.

Economic Impact of Adding 100 Jobs to Tourism Industries

Full-Service Restaurants	
Jobs Change	125
Earnings Change	\$2,275,000
Earnings/Worker Change	-\$27.21
Sales Multiplier	1.44
Jobs Multiplier	1.25
Earnings Multiplier	1.45
Limited-Service Restaurants	
Jobs Change	117
Earnings Change	\$1,598,000
Earnings/Worker Change	-\$32.12
Sales Multiplier	1.43
Jobs Multiplier	1.17
Earnings Multiplier	1.44
Hotels and Motels, except Casino Hotels	
Jobs Change	139
Earnings Change	\$3,133,000
Earnings/Worker Change	-\$23.15
Sales Multiplier	1.43
Jobs Multiplier	1.39
Earnings Multiplier	1.56
Drinking Places, Alcoholic Beverages	
Jobs Change	124
Earnings Change	\$2,174,000
Earnings/Worker Change	-\$28.00
Sales Multiplier	1.44
Jobs Multiplier	1.24
Earnings Multiplier	1.45
Independent Artists, Writers, and Performers	
Jobs Change	107
Earnings Change	\$962,000
Earnings/Worker Change	-\$35.50
Sales Multiplier	1.44
Jobs Multiplier	1.07
Earnings Multiplier	1.25

The "jobs change" includes the addition of 100 jobs to each industry. The "earnings change" shows the total change in earnings for all workers throughout the local economy. In each scenario, the "earning/worker change" value is negative, which indicates that the addition of 100 jobs in that industry will lead to the creation of jobs (including the original 100) that pay less than the regional average,