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Rhode Island Tourism 2013

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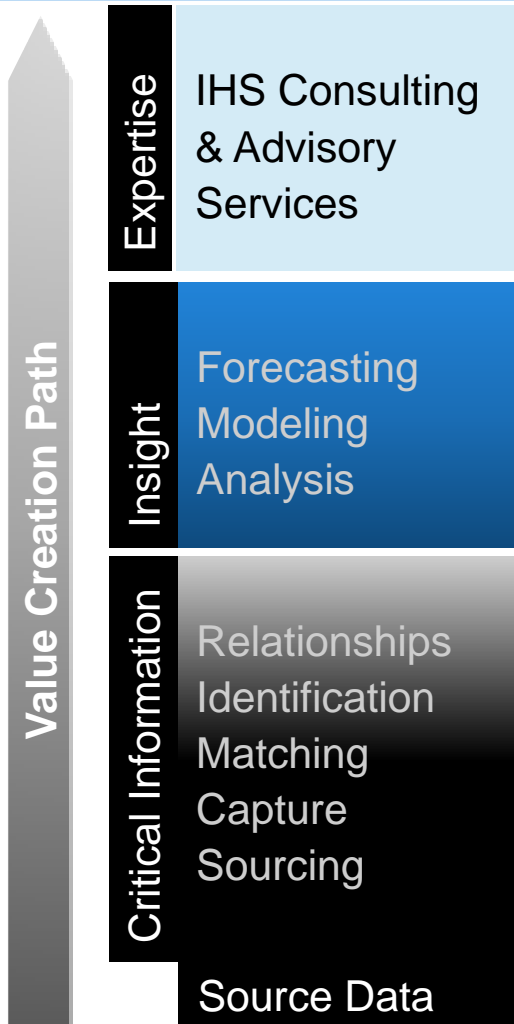
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Core Capabilities for Government Consulting



- **Economic Impact Analysis**

- Key themes: effects of public policy on the economy, jobs, incomes, tax revenues

- **Economic Development Strategy**

- Key themes: national investment, industrial development, cluster analysis, tourism analysis

- **Market Sizing & Forecasting**

- Key themes: Product line forecasting, market size, market segmentation

- **Fraud, Waste & Abuse Analytics**

- Key themes: predictive modeling, data mining, fraud detection

Tourism Satellite Accounting



- The **Tourism Satellite Account** is the international (UN/WTO, OECD) standard for measuring the contribution of tourism to an economy
- Measuring the industry “tourism” is difficult:
 - Tourism industry is not measured in standard economic accounting systems.
 - Most industries are accounted via the *supply-side*: firms are categorized into NAICS codes and asked about jobs, revenues, costs.
 - But tourism is a *demand-side* activity: the focus is on what the traveler buys before and during a trip. As a result, tourism touches many industries
- 4Cs: Credibility, Comprehensiveness, Comparability, Consistency

TSA and Tourism Economic Impact: Client Examples



Tourism Satellite Account

- Rhode Island
- South Dakota
- North Dakota
- Kansas
- New Jersey
- Bahamas
- Delaware
- Maryland
- Israel
- Dubai
- Abu Dhabi
- Guam
- North Carolina
- Alaska
- South Carolina
- Virginia
- Utah

Economic Impact

- Idaho
- Pennsylvania
- Indiana

City Tourism Impact

- | | |
|------------------|----------------|
| • Washington, DC | • Tulsa |
| • NYC | • St. Louis |
| • Dallas | • Kansas City |
| • Boston | • Battle Creek |
| • Arlington, TX | • Durham, NC |
| • Sacramento | • Savannah |
| • Baltimore | • Pittsburgh |
| • Philadelphia | • Austin |
| • Orlando | • Indianapolis |
| • Camden & SNJ | • Omaha |

Tourism Economic Impact: Definitions

- **Visitor:** GT 50 miles, non-commuting; All overnight trips
- **Resident Outbound:** Outbound purchases made in advance of a trip only. Resident usage of RI tourism assets are not included.

- **Tourism Expenditures:** A TSA concept, includes all spending by all constituents on travel made in the state (RI), including tourism related investments
- **Visitor Spending:** Spending in the jurisdiction by visitors (see above) (on accommodations, food & beverage, shopping, transportation, entertainment,...)
- **Economic Impact:** “GDP” definition...spending less value of supply chain purchases made outside RI. The amount retained in the RI economy.
- **Import Leakages:** The value of supply chain purchases made outside of RI.

- **Direct Spending/Jobs/Wages/Taxes:** Industries that “touch” the visitor (e.g. hotels, restaurants, museums,...)
- **Indirect Spending/Jobs/Wages/Taxes:** Industries that supply those that touch the visitor
- **Induced Spending/Jobs/Wages/Taxes:** Workers of industries that touch or supply spend their wages locally

Rhode Island Tourism Economic Impact - Definitions



Approach

- **TSA**: Results (spending, economic impact, jobs,...) conform strictly to the TSA definition (*e.g. 50mile+overnight visitor definition*).
- **TSA + Under 50 Mile**: TSA results, plus those coming from visitors traveling less than the 50 mile threshold. This classification is both historically consistent with previous studies and arguably more applicable to Rhode Island.

Impact Sources

- **Total Impact**: Total economic contribution of tourism to Rhode Island. Sum of core and non-core.
- **Core Impact**: Economic contribution of from industries directly providing goods and services to the visitor.
- **Non-core Impact**: Economic contribution from industries providing goods and services to core tourism providers. Also includes tourism investment.



2013 Rhode Island Tourism Results



State Overview: 2013 Totals at a Glance

Tourism Concept	TSA + Under 50Mile Visitors	TSA	TSA '12 – '13 Growth
<i>Visits</i>	19.02 M	9.19 M	4.8%
<i>Expenditures</i>	\$5.88 B	\$4.22 B	5.9%
<i>Total Economic Impact</i>	\$3.88 B	\$2.80 B	5.6%
<i>Core Economic Impact (GSP)</i>	\$3.32 B	\$2.38 B	5.5%
<i>Total Jobs</i>	66,616	45,162	4.6%
<i>Wages</i>	\$2.32 B	\$1.55 B	6.4%
<i>Taxes</i>	\$1,651 M	\$1,119M	5.5%

Industry Structure: Definitions



State Overview:

Tourism and Under 50Mile Visitors – 2013 vs. 2012

Measurement	2013	2012	Definition
Tourism (TSA) + Under 50Mile Visitor <u>Spending</u>	\$5.88B	\$5.67B	• <i>Spending from all tourism factors</i>
▪ Tourism Expenditures (TSA)	\$4.22B	\$3.98B	• <i>TSA Definition of State Tourism</i>
▪ Under 50Mile Visitors	\$1.66B	\$1.70B	• <i>Spending by visitors from less than 50 miles that utilize RI tourism assets</i>
Tourism + Under 50Mile Visitors Total <u>Employment</u>*	66,616	64,880	• <i>Employment required to support core RI tourism activity</i>
▪ Core Tourism (TSA) Employment*	39,849	38,082	• <i>TSA Definition of Tourism "Industry"</i>

What Revisions Were Made to the 2012 Figures



Key Measurements	2012 Original TSA	2012 Recast TSA
RI Expenditures (\$B)	\$3.97B	\$3.98B
Economic Value		
▪ Core Tourism	\$2.25B	\$2.26B
▪ Total Impact	\$2.64B	\$2.65B
Wages & Salaries		
▪ Core Tourism	\$1,197M	\$1,208M
▪ Total Impact	\$1,450M	\$1,461M
Employment ('000)		
▪ Core Tourism	37.93	38.08
▪ Total Impact	43.01	40.18
Taxes –Total Impact	\$1,059M	\$1,061M

Each year revisions to most of the historical tourism metrics must be made in order to reflect:

- New Baseline Data for IMPLAN interindustry model incorporating latest Census data
- Revisions to the BLS and BEA inputs covering employment, Gross State Product, Sales Output, and Payroll for all industries at the jurisdiction county level.
- Revision of investment data to include greater detail and new categories



Total Impact of Tourism

- In 2013, the total economic impact of travel & tourism (direct and indirect) was **\$2.80 billion**. This represents 5.3% of RI Gross State Product
- The ratio of the total impact to total expenditures reveals that **66¢ of each tourism dollar spent in** Rhode Island is retained in the state. The remainder represents import leakages. This share is fairly typical for a diversified state like Rhode Island and higher than many other states.
- **Over 45,000 jobs** – direct and indirect – were created by travel & tourism (TSA) economic activity. This accounts for **9.6% of total employment** in RI.
- **\$1.55 billion** in wages & salaries were generated by travel & tourism (TSA) in 2013.
- Tourism (TSA) generated **\$1.12 billion in federal, state, and local government taxes** in 2013, with the state and local tax contribution making up **8.9%** of all RI state government revenue.

Sources of Tourism Expenditures

- **Visitor Spending** – Expenditures by visitors who have come from greater than 50 miles or stayed overnight
 - **Business Travel** – Businesses' spending within the state economy on travel
 - **Resident Outbound** – Resident spending preparing for an out-of-state trip
 - **Government Spending** – Tourism Office Budgets, transportation functions related to tourism, publicly funded attractions and funding for security in tourism-intensive areas
 - **Investment** – Construction of hotels, attractions, tourism infrastructure, operating and transportation equipment
 - **International** – Spending of international visitors within the state
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- **Under 50Mile Visitors** – Spending by residents or non-residents who have come from under 50 miles. No commuters or local utilization. Not included in TSA definition.

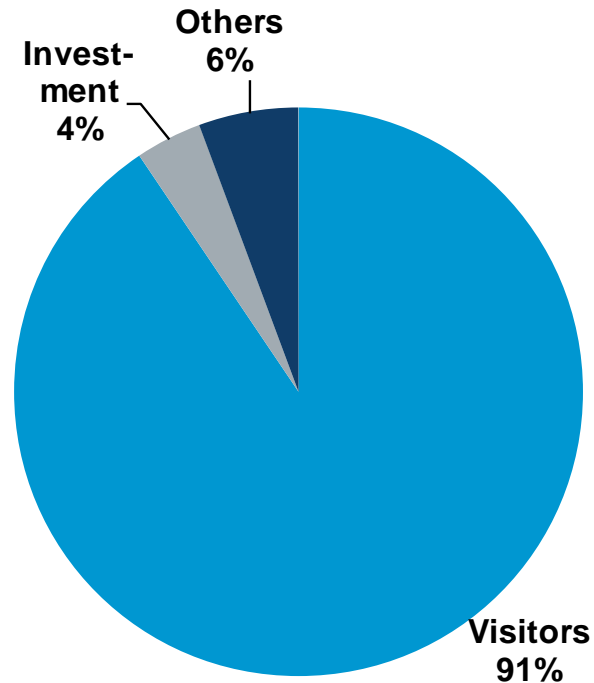
Breaking Down Tourism Expenditures – \$4.22 Billion



Growth in expenditures was seen in all categories, but investment activity and resident outbound travel outpaced visitor spending within the state.

	Million \$	Share Of Total	'12 – '13 Growth
Investment	160	3.8%	8.3%
Visitors	3,822	90.6%	6.2%
Other	239	5.7%	0.3%
Total	4,221	100%	5.9%

Source: IHS

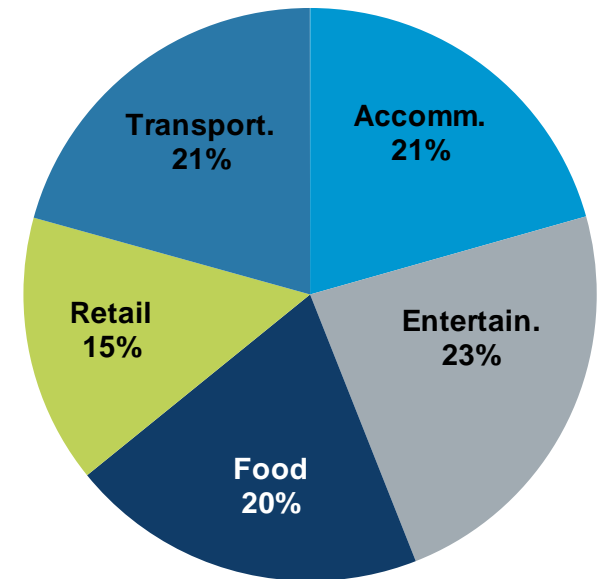


Category Distribution of Expenditures

In 2013, visitor spending increased across all categories. Entertainment spending growth led the way with an 8.7% improvement over 2012.

	2013 <50Mile Million \$	2013 TSA Million \$	TSA '12 – '13 Growth
Entertainment**	1,457	949	8.7%
Accommodation	836	836	7.2%
Transportation	864	839	1.3%
Food	1,706	817	7.5%
Shopping	1,020	615	4.1%
Total *	5,884	4,056	5.8%

TSA Expenditure Shares



* Direct and Indirect Tourism Expenditures (w/o construction & investment)

Source: IHS

** Entertainment category includes all marina and boating activity

Entertainment Spending Detail - TSA + Under 50Mile



The Entertainment category includes a wide array of industries, from gaming to recreation sports to movies. Total Entertainment spending grew 6.3% in 2013.

	2013 (\$000)	2012 (\$000)
Amusement Parks & Arcades	4,690	3,950
Gambling Industries	545,658	527,300
Independent Artists, Writers, & Performers	10,735	9,923
Motion Picture & Video Industries	134,146	144,172
Museums & Historical Sites	68,844	63,067
Other Amusement & Rec. Services**	499,915	449,581
Performing Arts Companies	83,818	72,660
Spectator Sports	109,611	100,890
Total Entertainment Spending	1,457,416	1,371,543

Source: IHS

** NAICS 7139 defined as: establishments primarily engaged in operating golf courses (whether or not in conjunction with dining facilities (country clubs); skiing facilities; Marinas; fitness and recreational sports centers; bowling centers; and all other amusement and recreation industries. Included in this industry group are public swimming pools, miniature golf courses and riding stables.



Entertainment Spending Detail - TSA

The Entertainment category includes a wide array of industries, from gaming to recreation sports to movies. Total Entertainment spending grew 8.7% in 2013.

	2013 (\$000)	2012 (\$000)
Amusement Parks & Arcades	4,456	2,830
Gambling Industries	267,303	258,800
Independent Artists, Writers, & Performers	7,514	6,946
Motion Picture & Video Industries	13,415	14,417
Museums & Historical Sites	34,422	31,533
Other Amusement & Rec. Services**	499,915	449,581
Performing Arts Companies	67,055	58,128
Spectator Sports	54,805	50,445
Total Entertainment Spending	948,884	872,654

Source: IHS

** NAICS 7139 defined as: establishments primarily engaged in operating golf courses (whether or not in conjunction with dining facilities (country clubs); skiing facilities; Marinas; fitness and recreational sports centers; bowling centers; and all other amusement and recreation industries. Included in this industry group are public swimming pools, miniature golf courses and riding stables.

Core Tourism

- Answers the question “How does tourism compare with other industries?”
- Core Tourism measures the size of the industry directly providing goods & services to the visitor.
- Indirect effects are excluded – these are part of other supplier industries such as wholesalers. The impact of capital investment is also excluded.
- Core Tourism generated \$2.38 billion in economic value in 2012. This ranks core tourism as the 9th largest private industry in RI in terms of Gross State Product.



Core Tourism Impact – Composition

The retail sector provides 15% of visitor spending, but the industry does not provide as much value to the local economy, so that spending doesn't translate as strongly towards economic contribution as those sectors make up only 5% of the economic impact.

Composition of Core Tourism				
Rank	Industry	\$ Value (Millions)	'12-'13 Growth	% of Total
1	Other amusement and recreation industries	622	7.3%	26.1%
2	Food services and drinking places	464	7.2%	19.5%
3	Real estate establishments	333	1.9%	14.0%
4	Hotels and motels, including casino hotels	279	10.7%	11.7%
5	Travel arrangement and reservation services	248	6.9%	10.4%
6	Automotive equipment rental and leasing	203	-4.7%	8.5%
7	Transport by air	41	3.8%	1.7%
8	Retail Stores - Food and beverage	39	8.1%	1.6%
9	Retail Stores - Clothing and clothing accessories	33	9.2%	1.4%
10	Performing arts companies	27	15.2%	1.1%
11	Spectator sports companies	23	8.2%	1.0%
12	Retail Stores - Miscellaneous	21	11.2%	0.9%
13	Retail Stores - Gasoline stations	16	-2.3%	0.7%
14	Transit and ground passenger transportation	12	-16.1%	0.5%
15	Retail Stores - General merchandise	9	1.6%	0.4%
	Other Industries	16	-0.2%	0.7%
	Total	2,385	5.5%	100.0%



Core Tourism – Employment

- Core Tourism is the 4th largest private sector employer in Rhode Island with more than **39,800 tourism supported jobs** in 2013.
- Core Tourism generated **9.7% of private sector employment** in 2013.
- Core Tourism jobs provided **\$1.3 billion in wages & salaries** in 2013.
- Core Tourism's **average annual wage** reached **\$32,273** in 2013.



Ranking Core Tourism – Employment

Travel & tourism is RI's 4th largest private sector employer.

Rank	Industry	Reported Employment (Thousands)	2012-2013 Growth	% of State	Tourism-Extracted Employment (Thousands)
1	Health Care and Social Assistance	80.5	1.4%	17.1%	80.5
2	Retail Trade	46.6	-0.7%	9.9%	43.4
3	Accommodation and Food Services	45.1	2.1%	9.6%	26.9
4	Manufacturing, Durables	26.5	4.7%	5.6%	26.5
5	Finance and Insurance	25.6	-0.7%	5.4%	25.6
6	Administrative and Waste Services	25.4	5.2%	5.4%	22.5
7	Educational Services	24.1	1.0%	5.1%	24.1
8	Other Services	22.6	0.0%	4.8%	20.2
9	Professional, Scientific, and Technical Services	21.9	2.0%	4.6%	21.9
10	Wholesale Trade	16.7	-1.3%	3.5%	16.7
11	Construction	16.1	0.3%	3.4%	16.1
12	Manufacturing, Nondurables	14.4	0.5%	3.1%	14.4
13	Information	11.3	18.1%	2.4%	11.3
14	Management of Companies and Enterprises	10.8	2.8%	2.3%	10.8
15	Transportation and Warehousing	9.0	-16.7%	1.9%	8.4
	Other Industries	14.4	5.7%	3.1%	1.8
	Total Nonfarm Private	411.0	1.2%	100.0%	371.1
	Government	60.2	0.1%		60.2
	Travel & Tourism	39.8	4.6%	9.7%	39.8

Core Tourism represented 39,849 jobs in 2013.

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Source: Bureau of Labor Statistics and IHS

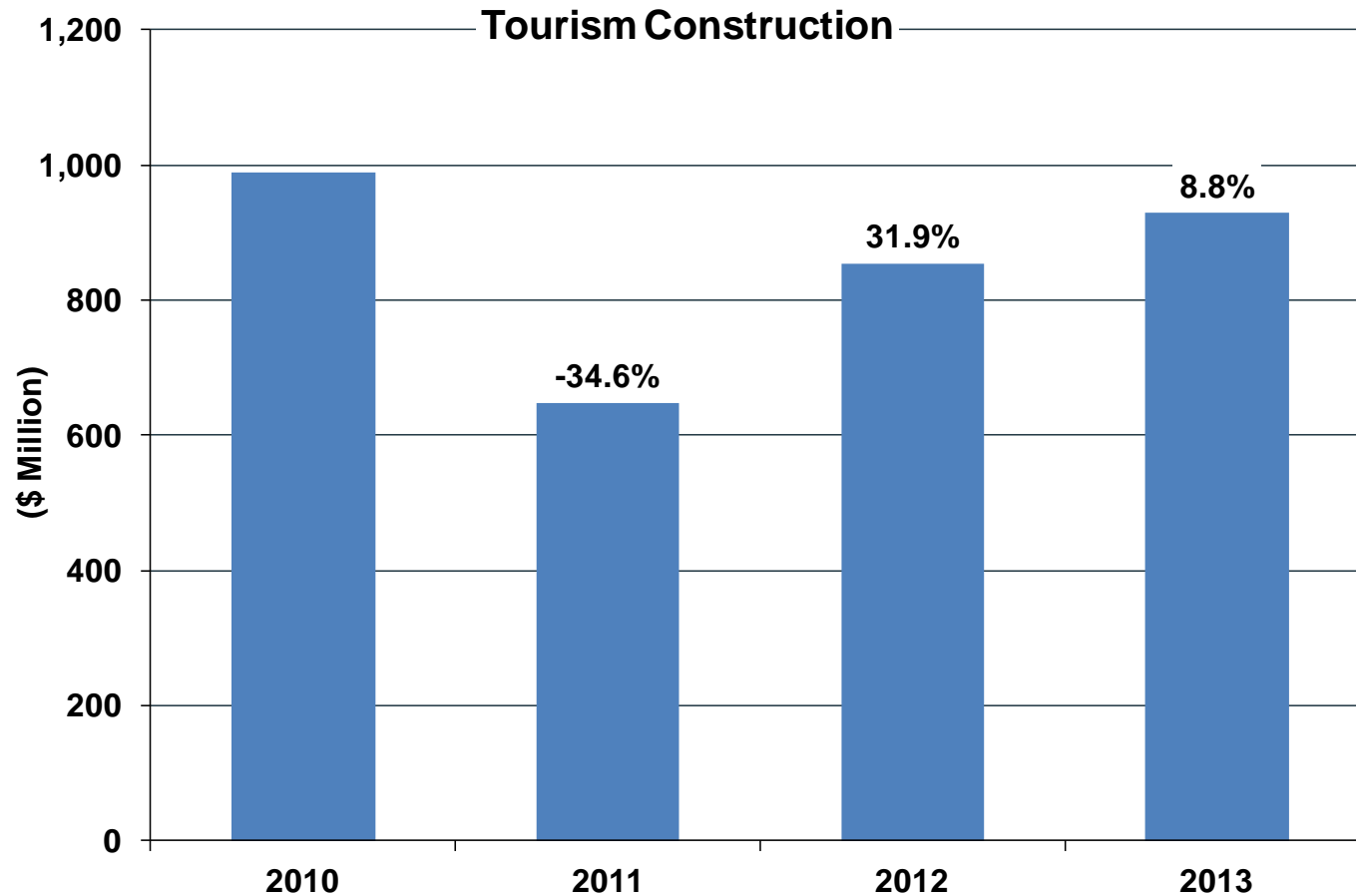


Non-Core Tourism – Indirect Benefits

Excluding Investment, non-core tourism grew 5.3% in 2013

Indirect Benefits of Tourism				
Rank	Industry	\$ Value (Millions)	'12-'13 Growth	% of Total
1	Real estate establishments	59	5.9%	12.0%
2	Monetary authorities and depository credit intermediation activities	34	2.2%	6.8%
3	Insurance carriers	27	4.6%	5.5%
4	Electric power generation, transmission, and distribution	18	7.1%	3.6%
5	Food services and drinking places	18	6.2%	3.6%
6	Maintenance and repair construction of nonresidential structures	16	5.5%	3.2%
7	Wholesale trade businesses	14	5.4%	2.8%
8	Telecommunications	14	6.0%	2.8%
9	Accounting, tax preparation, bookkeeping, and payroll services	13	6.8%	2.6%
10	Management of companies and enterprises	13	4.6%	2.6%
11	Legal services	9	6.0%	1.9%
12	Insurance agencies, brokerages, and related activities	8	5.3%	1.6%
13	Advertising and related services	7	6.9%	1.5%
14	US Postal Service	6	7.1%	1.3%
15	Employment services	6	6.5%	1.3%
	Other Industries	68	4.9%	13.6%
	Investment	165	8.0%	33.2%
	Total	496	6.2%	100.0%

Non-Core Tourism – Construction Benefits



Source: McGraw Hill Construction

Data is “Value of Construction Contracts”, measuring the value of government and private construction at the time when work begins, encompassing total value for entire projects which start or break ground in a given year, excluding ancillary costs such as land acquisition.



Tourism Generated \$1,119M in Total Tax Revenue in 2013

- Tourism activity generated \$682 million in state and local government revenue in 2013, a 5.2% increase over 2012.
- In 2013, \$431 million in state tax revenue was generated by the travel & tourism sector in Rhode Island. Indirect business tax (sales tax) and the gaming taxes are the two largest contributors.
- Tourism contributes disproportionately to state & local tax revenue. While Total Tourism is responsible for 5.5% of total RI GSP, it contributed 8.9% of state government revenue in 2013.
- If tourism didn't exist, each RI household would pay \$1,597 more in taxes to maintain the current level of state and local tax receipts.



State and Local Government Revenue

Tax Revenues from Tourism (TSA)	2013 (\$Million)	'12-'13 Growth
Federal Government		
Corporate Profits Tax	112.1	4.9%
Personal Income	121.6	6.4%
Social Security & Other Taxes	204.0	6.4%
Federal Total	437.7	6.0%
State Government		
Corporate Profits Tax	10.5	4.5%
Personal Income	37.1	6.4%
Sales	153.3	5.5%
Licenses & Fees	28.4	6.3%
Gaming Tax	178.8	3.3%
Other Taxes	12.7	5.7%
State Share of Occupancy Tax*	9.8	13.6%
State Total	430.6	4.9%
Local Government		
Local Share of Occupancy Taxes	8.7	13.6%
Property Taxes	242.4	5.6%
Local Total	251.1	5.8%
Total	1,119.4	5.5%

Source: IHS

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* Remainder of Room Tax not distributed back to local towns and cities.

How Important?

TSA + UNDER 50MILE VISITORS

Gross State Product: \$3.88 billion
7.3 % of **GSP**
Total Employment: 66,616 jobs
14.1% of **Employment**

TOTAL TSA:

Gross State Product: \$2.80 billion
5.3% of **GSP**
Total Employment: 45,162 jobs
9.6% of **Employment**

CORE TOURISM

Core GSP: \$2.38 billion
4.5% of **GSP**
Core Employment: 39,849 jobs
8.5% of **Employment**

**Total Tourism-
related
spending of
\$5.88 billion**



Talking Points: What Do *Visitors* Mean to RI?



- ✓ If tourism didn't exist, each household would pay \$1,597 more in taxes to maintain the current level of state and local tax receipts
- ✓ Each visitor creates about \$122 in tax receipts, \$74 of which goes to state & local authorities
- ✓ It takes only 214 visitors to pay for one Rhode Island public school student for one year
- ✓ Each RI visitor/traveler generates about \$459 in expenditures, \$45 of which goes to RI businesses that do not directly "touch" that visitor
- ✓ Every 203 visitors creates a new RI job
- ✓ Each visitor adds about \$259 to RI Gross State Product

Regional Distribution of Tourism

Rhode Island is divided into eight regions in the analysis:

Blackstone Valley

- Burrillville
- Central Falls
- Cumberland
- Gloucester
- Lincoln
- North Smithfield
- Pawtucket
- Smithfield
- Woonsocket

Providence

- Providence
- East Providence

Warwick

- Warwick

Block Island

- Block Island

Balance of State

- Cranston
- Foster
- Johnston
- North Providence
- Scituate
- West Warwick

Newport County

- Little Compton
- Middletown
- Newport
- Portsmouth
- Tiverton
- Jamestown

South County

- Charlestown
- Coventry
- East Greenwich
- Exeter
- Hopkinton
- Narragansett
- North Kingstown
- Richmond
- South Kingstown
- Westerly
- West Greenwich

East Bay

- Barrington
- Bristol
- Warren





Regional TSA + Under 50Mile Expenditures

Regional Expenditures by Category (\$M) - 2013

	Accommodations	Entertainment	Food	Retail	Transportation	Total
Balance of State	10.51	49.41	218.32	80.16	87.47	445.87
Blackstone Valley	27.99	545.56	256.01	68.02	88.37	985.96
Block Island	100.88	64.64	27.66	53.73	19.73	266.64
East Bay	6.10	27.50	61.16	41.98	11.24	147.98
Newport	245.89	200.77	245.99	90.99	45.84	829.47
Providence	147.02	399.21	427.22	413.68	320.94	1,708.07
South County	230.25	96.89	274.82	173.78	50.50	826.23
Warwick	67.54	73.44	195.12	97.93	239.95	673.97
Total	836.17	1,457.42	1,706.30	1,020.27	864.04	5,884.19

Entertainment data includes gaming, spectator sports boating and marina activity and other categories.



Regional TSA Tourism Expenditures

Regional Expenditures by Category (\$M) - 2013

	Accommodations	Entertainment	Food	Retail	Transportation	Total
Balance of State	10.51	34.62	91.81	44.38	91.21	272.53
Blackstone Valley	27.99	248.75	119.28	40.97	88.78	525.78
Block Island	100.88	59.13	27.67	31.35	15.17	234.20
East Bay	6.10	26.43	32.78	26.15	10.62	102.08
Newport	245.89	135.19	115.47	57.28	29.69	583.53
Providence	147.02	303.34	218.54	242.48	310.79	1,222.16
South County	230.25	94.92	122.31	102.04	42.15	591.67
Warwick	67.54	46.49	89.10	70.62	250.78	524.52
Total	836.17	948.88	816.95	615.28	839.18	4,056.48

Accommodation data includes seasonal second home rentals, which creates significant differences in share from state room tax data. As the TSA definition of tourism includes any overnight stay, accommodations results are the same for TSA and TSA + Under 50Mile.

Regional Share of Statewide TSA + Under 50Mile Expenditures



Regional Share of State Expenditures by Category - 2013

	Accommodation	Entertainment	Food	Shopping	Transportation	Total
Providence	17.6%	27.4%	25.0%	40.5%	37.1%	29.0%
Blackstone Valley	3.3%	37.4%	15.0%	6.7%	10.2%	16.8%
Newport	29.4%	13.8%	14.4%	8.9%	5.3%	14.1%
South County	27.5%	6.6%	16.1%	17.0%	5.8%	14.0%
Warwick	8.1%	5.0%	11.4%	9.6%	27.8%	11.5%
Balance of State	1.3%	3.4%	12.8%	7.9%	10.1%	7.6%
Block Island	12.1%	4.4%	1.6%	5.3%	2.3%	4.5%
East Bay	0.7%	1.9%	3.6%	4.1%	1.3%	2.5%
Total	100%	100%	100%	100%	100%	100%

Entertainment data includes gaming, spectator sports boating and marina activity and other categories.

Regional Share of Statewide TSA + Under 50Mile Expenditures



Expenditure Category Share of Regional Tourism Spending - 2013						
	Accommodation	Entertainment	Food	Shopping	Transportation	Total
Providence	8.6%	23.4%	25.0%	24.2%	18.8%	100.0%
Blackstone Valley	2.8%	55.3%	26.0%	6.9%	9.0%	100.0%
Newport	29.6%	24.2%	29.7%	11.0%	5.5%	100.0%
South County	27.9%	11.7%	33.3%	21.0%	6.1%	100.0%
Warwick	10.0%	10.9%	29.0%	14.5%	35.6%	100.0%
Balance of State	2.4%	11.1%	49.0%	18.0%	19.6%	100.0%
Block Island	37.8%	24.2%	10.4%	20.1%	7.4%	100.0%
East Bay	4.1%	18.6%	41.3%	28.4%	7.6%	100.0%
Grand Total	14.2%	24.8%	29.0%	17.3%	14.7%	100.0%

Warwick's Transportation share is very high as TF Green Airport revenue is counted here.

Regional Share of Statewide TSA Tourism

Regional Share of State Expenditures by Category - 2013

	Accommodation	Entertainment	Food	Shopping	Transportation	Total
Providence	17.6%	32.0%	26.8%	39.4%	37.0%	30.1%
South County	27.5%	10.0%	15.0%	16.6%	5.0%	14.6%
Newport	29.4%	14.2%	14.1%	9.3%	3.5%	14.4%
Blackstone Valley	3.3%	26.2%	14.6%	6.7%	10.6%	13.0%
Warwick	8.1%	4.9%	10.9%	11.5%	29.9%	12.9%
Balance of State	1.3%	3.6%	11.2%	7.2%	10.9%	6.7%
Block Island	12.1%	6.2%	3.4%	5.1%	1.8%	5.8%
East Bay	0.7%	2.8%	4.0%	4.3%	1.3%	2.5%
Total	100%	100%	100%	100%	100%	100%

Accommodation data includes seasonal second home rentals, which creates significant differences in share from state room tax data. As the TSA definition of tourism includes any overnight stay, accommodations results are the same for TSA and TSA + Under 50Mile.



Regional Share of Statewide TSA Tourism

Expenditure Category Share of Regional Tourism Spending - 2013

	Accommodation	Entertainment	Food	Shopping	Transportation	Total
Providence	12.0%	24.8%	17.9%	19.8%	25.4%	100.0%
South County	38.9%	16.0%	20.7%	17.2%	7.1%	100.0%
Newport	42.1%	23.2%	19.8%	9.8%	5.1%	100.0%
Blackstone Valley	5.3%	47.3%	22.7%	7.8%	16.9%	100.0%
Warwick	12.9%	8.9%	17.0%	13.5%	47.8%	100.0%
Balance of State	3.9%	12.7%	33.7%	16.3%	33.5%	100.0%
Block Island	43.1%	25.2%	11.8%	13.4%	6.5%	100.0%
East Bay	6.0%	25.9%	32.1%	25.6%	10.4%	100.0%
Grand Total	20.6%	23.4%	20.1%	15.2%	20.7%	100.0%



Warwick's Transportation share is very high as TF Green Airport revenue is counted here.



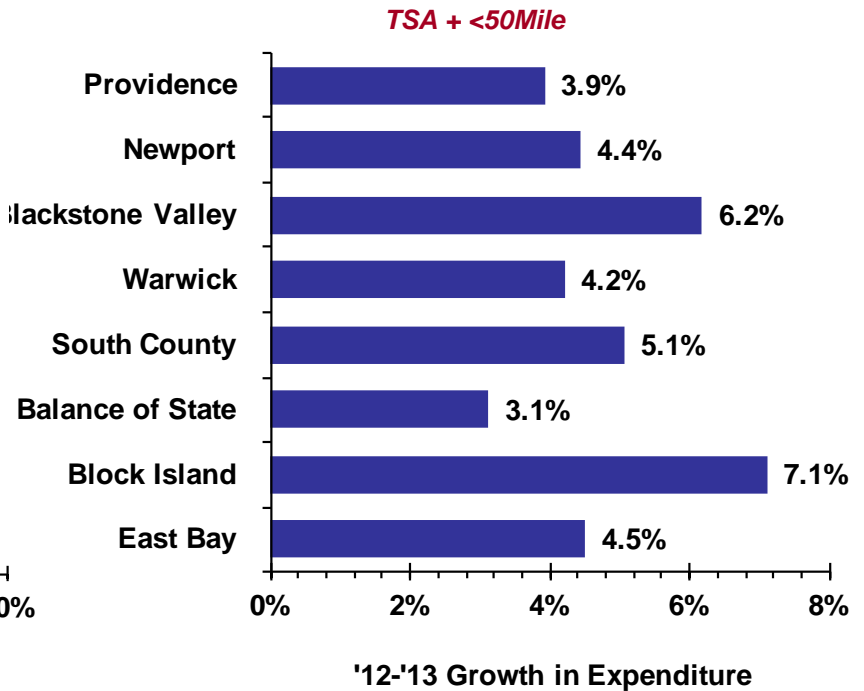
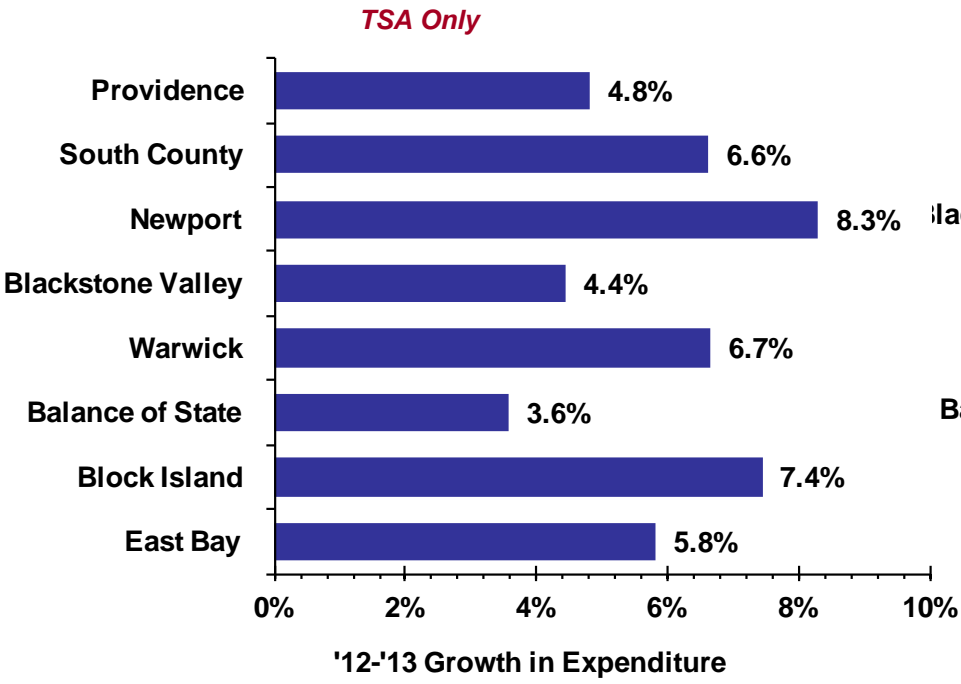
TSA + Under 50Mile Growth Rates by Region

Regional Growth Rates by Category 2012 vs. 2013						
	Accomodation	Entertainment	Food	Retail	Transportation	Grand Total
Balance of State	9.7%	4.3%	3.7%	2.3%	1.1%	3.1%
Blackstone Valley	8.8%	5.8%	4.5%	5.2%	1.1%	5.1%
Block Island	6.9%	8.8%	9.9%	5.7%	3.0%	7.1%
East Bay	13.2%	9.6%	2.8%	3.1%	2.9%	4.5%
Newport	5.7%	6.1%	3.1%	3.7%	-0.2%	4.4%
Providence	3.7%	5.6%	4.6%	3.6%	1.5%	3.9%
South County	11.3%	8.0%	4.0%	3.5%	2.0%	6.2%
Warwick	6.6%	9.3%	7.5%	3.3%	0.0%	4.2%
Grand Total	7.2%	6.3%	4.5%	3.7%	1.0%	4.6%

The transportation category was the only segment that showed significantly below average growth.



Regional Growth in Expenditures



All tourism regions within the state continue to benefit from the growth within tourism.



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