

The Economic Impacts of The Kripalu Center for Yoga & Health

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May 2018

Summary of Findings

- The Kripalu Center for Yoga & Health attracts over 30,000 guests per year to its facilities and programming and based on budget is the fifth largest not-for-profit organization group in Berkshire County.
- The Kripalu Center and its guests directly or indirectly generate about \$64 million in total economic output in Massachusetts, about \$56 million of it concentrated in Berkshire County.
- The Center directly or indirectly generates about \$27 million in labor income, \$22 million of which is concentrated in Berkshire County.
- The labor income generated supports as many as 670 part-time and full-time jobs in hundreds of economic sectors, with the largest number in educational services, lodging, retailing, real estate and restaurants.
- The average annual earnings by those employed is estimated to be between \$33 and \$42 thousand per year, with actual amounts depending on the sector and location of employment.
- Each year, the Kripalu Center directly and indirectly generates about \$7.5 million in increased tax revenues for state and local governments. This includes more than \$2.2 million in residential property taxes paid by Kripalu guests who have purchased and maintain homes to be near to the Center.



A. Introduction

The Kripalu Center for Yoga and Health is in the Berkshire Hills of western Massachusetts, roughly equidistant from Boston and New York City. The Stockbridge location was originally the Shadowbrook estate and mansion, built in 1893 and later acquired by Andrew Carnegie in 1917. Carnegie died in the mansion in 1919, and the property was subsequently sold to the Jesuits who used the property as a novitiate and training center. The mansion was destroyed by fire in 1956 and replaced by a large and functional (although less grand) building and used by the religious order until 1970. In 1983 the Kripalu Yoga Fellowship purchased the property, relocated from Pennsylvania and opened the Kripalu Center for Yoga and Health.

The Kripalu Center operated officially as a religious order, offering training and residential accommodation to more than 350 members. In 1999 Kripalu reorganized as a non-religious 501(c)(3) non-profit organization that receives more than a third of its revenues from contributions, donations and receipts related to its exempt (charitable) functions. It is classified by the National Center for Charitable Statistics as a provider of “Personal Social Services” and describes itself as the largest and most established retreat center for yoga, health and holistic living in North America. The Center offers more than 700 programs annually ranging from one-day retreats, seminars, and classes to 1000-hour



yoga instructor certification programs. Each year more than 30,000 guests visit the Center, which has an annual operating budget of between \$34 and \$35 million. The Center has about 460 active employees and total assets exceeding \$50 million. In 2010 the Center opened an annex providing 80 additional guest rooms that won awards for its architectural design. The Center now has accommodation for about 650 overnight guests.

Over the past three decades, the Kripalu Center has become an integral and important part of the Massachusetts economy, particularly in Berkshire County. This report presents an evaluation of the impact of the Center on the level of economic activity, employment, labor earnings, and tax revenues.

B. Measuring economic Impact

To understand the economic impact of the Kripalu Center, we need to begin with a clear definition of the geographic area that we take as defining the *local economy*, the structure of economic interactions within this area and between the local economy and the wider economy that contains it, and the period over which the impacts are to be estimated.

We consider and present economic impact estimates for two areas that can be taken to define the local economy. The larger area is the state of Massachusetts. Kripalu data for 2017 indicates that about 28% of Kripalu visitors come from within Massachusetts, and many of the top 100 vendors of goods and services purchased by Kripalu are based in Massachusetts. We also consider the smaller local economy of Berkshire County, where Kripalu is located. While a very small share of total Kripalu visitors (about 3%) come from this relatively small county, a large fraction (nearly 79%) of Kripalu employees reside in the county and many Berkshire County communities directly benefit from increased economic activity that originates with Kripalu.

The alternative geographies of the economy are illustrated in Figure 1 below, superimposed over zip code areas that are colored to illustrate the number of guests in 2017 who reside in each zip code area. While the map in the figure is centered on the northeastern US, Kripalu

visitors come from a wide range of locations in the US, Canada and beyond. The map shows the state of Massachusetts outlined in black, with Berkshire County also outlined in the far western edge of the state. The location of the Kripalu Center is indicated by the star near the western border with New York.

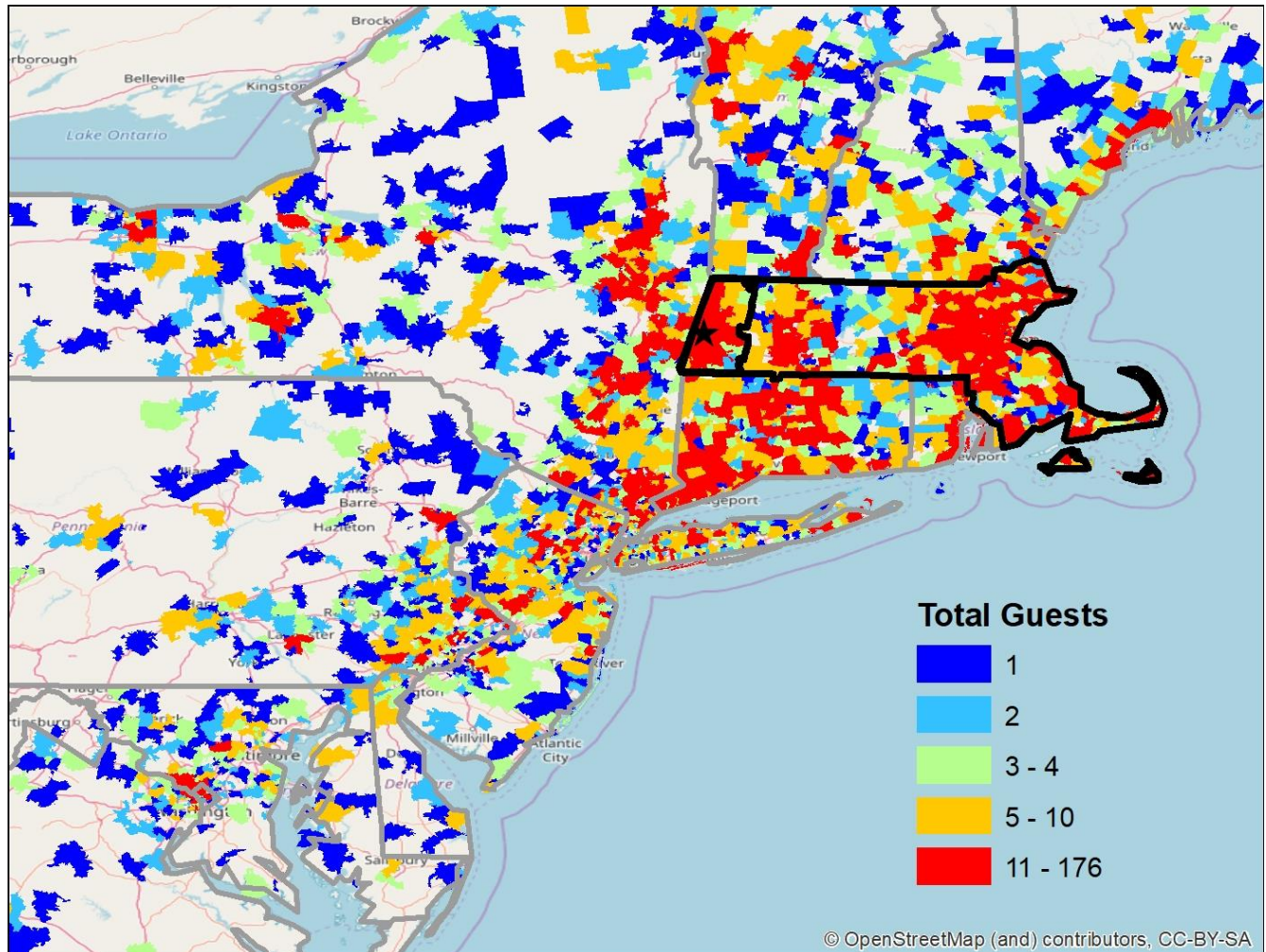
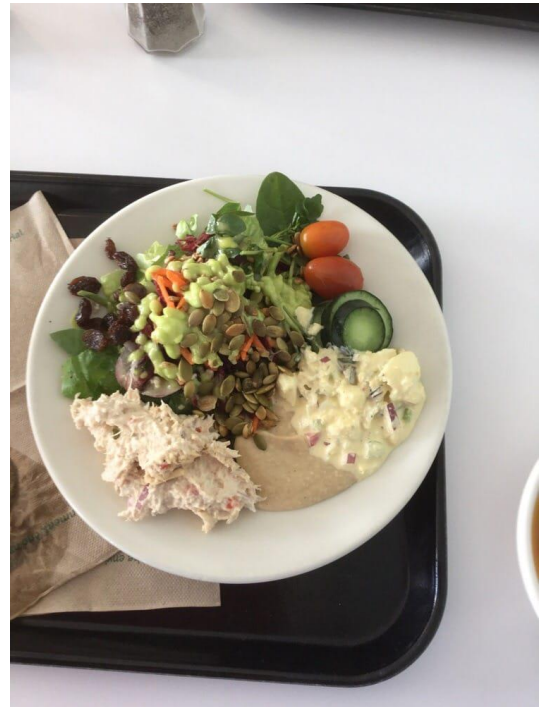


Figure 1: Local areas for analysis, with zip codes indicating guest origins in 2017

The area taken as defining the local economy is important for at least two reasons. First, total economic impacts arise not only from the economic activities of Kripalu, but from the spending being recirculated in the local economy to contribute again and again to total economic activity. This *multiplier effect* is larger in a larger economy (like all of Massachusetts) because there is less “leakage” and more opportunity for spending to remain local. The second reason is that in

evaluating the local economic impacts of visitors to Kripalu, we consider only the local spending generated by guests who come from outside of the local area. The rationale for this approach is to avoid the concern that when a local resident visits Kripalu and makes local expenditures outside of Kripalu, these expenditures might well have taken place near another spa, yoga or other venue. The observed expenditures may simply be displaced from one part of the local area to another and not provided a net increase in the local economy. To provide the most careful estimate possible and to avoid trying to estimate how many local visitors were persuaded to remain local rather than travel for recreation and learning outside of the region, we simply assume that all local visitor spending is displaced spending and do not count it as part of local economic activity.



Beyond a definition of the local area, we need a model of the full range of interactions that comprise the local economy. For this we make use of a widely-used *inter-industry* modeling approach – one for Berkshire County and one for Massachusetts. This approach divides the economy up into hundreds of economic sectors and uses data collected regularly by the US Bureau of Economic Analysis to measure the flows of purchases of goods and services between these economic sectors, the wider outside economy, and local households. This approach allows us to provide a measure of the change in the local economy that would be expected if the Kripalu Center were not offering lodging, meals, courses, seminars and other experiences to guests, but other aspects of the local economy remained as they are. We use the model to provide measures of the associated change in total economic output, total employment (full and part time), total labor earnings, and total tax revenues attributable to the Kripalu Center.

The models are tuned to the current structure of the Berkshire or Massachusetts local economy. Not all sectors of the local economy are active in each location. The Berkshire County local economy has about 235 distinct sectors in the model, and the larger Massachusetts local economy has about 465 distinct sectors operating and producing output.

We make use of data for total expenditures by the Kripalu Center and total numbers of visitors and visitor origins for the 2017 calendar year, projected to 2018 to estimate total economic impacts.



Part of these calculations requires estimating average local area expenditures made outside of Kripalu by each visitor, along with the expected duration of their visit to the region. For these we undertook an e-mail survey requesting information from relatively recent visitors and adjusted their reported expenditures to reflect inflation. This provided an estimate of typical local expenditures made during 2017 in each of five economic sectors: hotels/lodging, restaurants, retail, transportation (primarily fuel for automobiles), and local services including child care. The average expenditures in these sectors are applied to obtain an estimate of total impact of visitors from outside of the local economy for 2018. Details about the survey

responses and other data sources used as inputs into the economic models are presented in section E below.

The models produce several types of estimated impacts, including impacts on total output, employment, labor income and tax revenues collected by federal, state and local governments. These impacts are produced for the aggregate of the local economy, and impacts on output, employment and labor income are calculated for each active sector in the local economy. For

each of these, the models calculate the *direct* impacts, which are the changes in the economy that are due to the direct actions Kripalu or those visitors who make purchases in the local economy. These direct actions would include production of educational services, production of lodging and meals for guests, and operation of a retail store. These direct actions then lead to two types of additional impacts. The *indirect* impacts arise because Kripalu, in the process of producing educational services or lodging and meals for guests makes some purchases from other sectors of the local economy (such as electricity, banking, or food supply) and causes them to expand. The *direct* production expansion at Kripalu as well as the *indirect* local expansion increases local employment and generates an increase in local income. This generates the third type of impact known as *induced* impacts. These arise because the increases in local income leads to increased purchases from a variety of local sectors - from automobile dealerships to grocery stores to real estate and residential construction. The *indirect* and *induced* impacts are sometimes referred to as the multiplier effect, and the greater is the tendency for purchases to be made locally, the greater will be the multiplier effect and hence the total impact on the local economy.



These impacts are intended to be interpreted as the *impact of current operations* of Kripalu, not a forecast of change or expansion in the local economy. The estimated impacts are best thought of as the amount by which the local economy would shrink if the current operations of Kripalu were to cease (and not be replaced by a similar organization). In this sense, they provide an estimate of the share of the local economy that is attributable to or based upon the operation of Kripalu and the expenditures of its guests visiting the area.

The estimates can be used as the basis for predicting modest changes. For example, if total visitors to Kripalu were to increase by 20% to approximately 36,000 per year, and if in response

Kripalu were to expand its budget proportionally by 20% to about \$42 million per year, then the total impacts on the local economy (provided and discussed below) could be expected to increase by about 20%.

C. Economic Impact on the Massachusetts economy

Taking Massachusetts as our definition of the *local area*, we use the inter-industry model of the economy to obtain estimates of the economic impact on all of Massachusetts. Combining impacts in all sectors of the economy together, the impact on total economic output in Massachusetts attributable to Kripalu operations and guests whose residence is outside of Massachusetts is shown in Table 1.

Table 1: Impacts of Kripalu on economic output in Massachusetts

Massachusetts	Direct	Indirect+Induced	Total
Operations	\$34,568,751	\$27,777,751	\$62,346,503
Visitors	\$928,886	\$761,298	\$1,690,184
Combined Impact	\$35,497,637	\$28,539,050	\$64,036,686

Altogether, the Massachusetts economy is \$64 million larger than it would be without Kripalu. The increase in the Massachusetts economy arises from \$35.5 million in direct impacts, which are concentrated in the hospitality, educational services, restaurant, retail and transport sectors. These direct impacts are augmented by about \$28.5 million in indirect and induced impacts, which are felt in hundreds of sectors ranging from Real Estate and Hospitals to Veterinary Services. The impacts on total employment are shown in Table 2.

Table 2: Impacts on employment in Massachusetts

Massachusetts	Direct	Indirect+Induced	Total
Operations	457	171	628
Visitors	14	5	19
Combined Impact	471	176	647

The models estimate a net increase of 647 jobs throughout Massachusetts attributable to Kripalu operations and visitors. These are estimates of total employees, some of whom will work part time.

Table 3: Impacts on labor income in Massachusetts

Massachusetts	Direct	Indirect+Induced	Total	Average Income
Operations	\$15,685,607	\$10,730,387	\$26,415,994	\$42,059
Visitors	\$466,918	\$288,412	\$755,330	\$40,281
Combined Impact	\$16,152,525	\$11,018,799	\$27,171,324	\$42,008

Table 3 provides estimates of the impacts on total labor income. The results show that Kripalu operations and spending by guests increase income to workers by more than \$27 million.

Table 4: Industrial sectors associated with the largest employment impacts

Industrial sector	Jobs	Ave Income
Total	647	\$42,008
Educational services	259	\$26,118
Hotels and motels	167	\$49,847
Retail - Miscellaneous stores	45	\$22,527
Real estate	10	\$36,414
Full-service restaurants	9	\$27,650
Other food and drinking places	7	\$33,353
Hospitals	7	\$89,634
Child day care services	6	\$32,019
Services to buildings	6	\$31,863
Limited-service restaurants	5	\$23,314
Retail - Food and beverage	4	\$29,839
Employment services	4	\$53,976
Wholesale trade	4	\$108,688
Offices of physicians	3	\$117,594
Individual and family services	3	\$30,902
Management of companies	3	\$163,591
Retail - General merchandise	3	\$29,222
Management consulting services	3	\$109,937
Maintenance of nonresidential structures	3	\$67,015
Junior colleges, colleges, universities	3	\$74,178
Home health care services	3	\$51,585

Combining this information with the estimated total impact on employment, we can calculate the average income paid to workers whose employment is supported directly or indirectly by Kripalu. Averaged over all workers in all economic sectors the annual earnings are approximately \$42 thousand. These incomes are earned in a variety of sectors of the economy, and Table 4 shows the total employment impacts and average worker income for the 20 sectors that experience the largest increases in employment. These averages are calculated over workers in each sector and are not adjusted for hours worked. Economic sectors where part-time employment is more frequent will have lower average incomes even if the hourly rate of pay were the same.

Table 5 presents an estimate of the tax revenues collected by federal, state and local government. It is a common misperception that not-for-profit organizations pay no taxes whatever. While it is true that in Massachusetts they pay no property taxes on properties that are directly used in charitable activity, they do pay property taxes on property that is not directly used for charitable purposes. In addition, they collect sales taxes, pay the employer's share of FICA and other associated taxes on labor employment. They also indirectly generate tax revenues through payment of incomes to employees and supporting expansion in other parts of the economy.

Table 5: Impacts on tax revenues

Massachusetts	<i>Tax Impacts</i>		
	State/Local	Federal	Total
Operations	\$5,080,728	\$6,532,520	\$11,613,248
Property taxes on second homes	\$2,216,955		\$2,216,955
Visitors	\$124,261	\$182,170	\$306,431
Combined Impact	\$7,421,944	\$6,714,690	\$14,136,634

Our model estimates the increase in tax revenues that are collected because of Kripalu operations and local spending by visitors who come to the state as guests. Our models do not directly calculate the increase in property taxes paid to local governments because of second homes that are purchased in the area to be near to Kripalu. Using the same survey used to collect information about spending by guests visiting the area, we estimated the number of

Kripalu guests who own second homes in the area and identified the subset of these who indicated that proximity to Kripalu was a primary or secondary reason for purchase of the property. The property taxes paid on these residences is another source of tax revenue that is generated by the presence of Kripalu and the amount is reflected in Table 5. Altogether, Table 5 indicates that government revenues of \$14 million per year are generated by Kripalu operations and guest visitors. This provides over \$7.4 million to state and local governments and generates \$6.7 million in federal tax payments and underscores the observation that there are many pathways for an organization to contribute to or “pay” taxes.

D. Economic impact on Berkshire County

With a population of just under 128,000 that has been slowly declining for more than 50 years, Berkshire County is certainly a smaller local economy than the entire state of which it is a part. During these decades it has experienced continued erosion of its traditional base of light to medium manufacturing and associated business services. This has meant the closure of some of the pillars of the local economy such as General Electric, Sprague Electric, and the KB Toys corporate headquarters. At the same time, the region has managed to retain some more specialized or technical production where competition was perhaps less intense. Crane & Company, Petricca Industries/Unistress, General Dynamics, Interprint, and a variety of smaller specialty firms such as Boyd Technologies and Berkshire Sterile Manufacturing. Despite these successes, employment in manufacturing and business services as a share of the Berkshire local economy has declined steadily over the past several decades.

As the transition to a post-industrial economy has proceeded, the region has demonstrated continued strength in economic sectors dominated by not-for-profit organizations including higher education, health care, arts and recreation, and social/personal services. This stability and growth has resulted in growth of the relative importance of related sectors such as lodging and hospitality, restaurants and drinking places, and a variety of specialty retail sectors. The Berkshire local economy has transformed from one that is less dependent on producing goods

that are transported to markets distant from western Massachusetts to one that increasingly produces services consumed by markets that travel to western Massachusetts to benefit from and experience them. The guests and visitors who come for these services and experiences must be transported, accommodated, fed and cared for during their visit.

The Kripalu Center is a premier example of such an organization that is, increasingly, serving as a stable building block of the Berkshire local economy. Viewed in terms of total expenditures, Kripalu is the fifth largest non-profit group in Berkshire County, after the enormous Berkshire Health Systems group, Williams College, Tanglewood, and the Berkshire School. While the number of non-local visitors who come to Kripalu is less than the major cultural venues of Tanglewood, MASS MoCA, the Clark Art Institute or the Norman Rockwell Museum, it is similar to or larger than several other organizations such as Williamstown Theatre Festival, Mahaiwe Performing Arts Center or The Mount.

Using the audited financial data from Kripalu to allocate Kripalu budgeted expenditures among three economic sectors as described in the preceding section, and the estimated local spending by non-local visitors we can calculate the impact on total economic output in the Berkshire local economy. The results are presented in Table 6.

Table 6: Impacts on economic output in Berkshire

Berkshire County	<i>Total Economic Output</i>		
	Direct	Indirect+Induced	Total
Operations	\$34,568,751	\$19,498,073	\$54,066,824
Visitors	\$1,333,074	\$766,110	\$2,099,185
Combined Impact	\$35,901,825	\$20,264,184	\$56,166,009

It may be instructive to compare the analysis presented in Table 6 with Table 1 above. Here we see that the total impact from visitors is over 24% larger. This is because while 72% of Kripalu guests reside outside of Massachusetts, nearly all of them – about 97% - reside outside of Berkshire County. This means an additional 7500 guests are generating local economic impacts.

On the other hand, the economic impacts from Kripalu operations are nearly \$8.3 million less. As mentioned above, this happens because the Berkshire economy is smaller so the expenditures that Kripalu makes in the course of producing its services are more quickly spent outside of the local economy.

The estimated total number of jobs viewed from the perspective of the Berkshire economy is not reduced but is slightly larger than for all of Massachusetts. This happens because of how the employment impacts are estimated. The model starts by estimating the total change in output for each economic sector, and from that estimates the change in employment. Because wages in Berkshire County are somewhat lower than the average for all of Massachusetts, a given dollar value expansion in the economy will support more total workers. The estimated impacts are given in Table 7.

Table 7: Impacts on employment in Berkshire

Berkshire County	<i>Employment</i>		
	Direct	Indirect+Induced	Total
Operations	486	160	646
Visitors	22	6	28
Combined Impact	508	167	675

As was the case in estimating impacts for the entire Massachusetts economy, the jobs that are supported by Kripalu operations and guests visiting the area occur in a variety of sectors of the local economy. Table 8 summarizes the total labor income generated and the average income earned by workers whose job opportunities are attributable to Kripalu.

Table 8: Impacts on labor income in Berkshire

Berkshire County	<i>Total Labor Income</i>			
	Direct	Indirect+Induced	Total	Average Income
Operations	\$14,576,114	\$6,791,610	\$21,367,724	\$33,059
Visitors	\$608,656	\$263,320	\$871,976	\$30,751
Combined Impact	\$15,184,771	\$7,054,930	\$22,239,701	\$32,962

As with the estimated impact on total economic output in the local area, the total labor income generated is lower than that estimated for the entire state of Massachusetts. This reflects both the fact that the larger economy has a larger multiplier effect and that market values for labor income are greater at the state level than in Berkshire County.

The average income earned by Berkshire County workers whose jobs are directly or indirectly generated by Kripalu is just under \$33 thousand. This average, however, obscures the wide range of incomes earned in different sectors of the economy. Table 9 shows the total employment impacts and average incomes for the 20 sectors that are associated with the largest increases in Berkshire County employment.

Table 9: Industrial sectors associated with the largest employment impacts

Industrial sector	Jobs	Ave Income
Total	675	\$32,962
Educational services	257	\$26,456
Hotels and motels	197	\$36,830
Retail – Miscellaneous stores	50	\$20,023
Full-service restaurants	11	\$21,594
Real estate	10	\$38,422
All other food and drinking places	8	\$26,850
Child day care services	8	\$27,448
Hospitals	6	\$91,775
Services to buildings	5	\$13,945
Limited-service restaurants	5	\$19,663
Retail - Food and beverage stores	4	\$30,167
Retail - General merchandise stores	4	\$27,201
Maintenance of nonresidential structures	3	\$51,893
Individual and family services	3	\$24,610
Monetary authorities and credit	3	\$81,535
Offices of physicians	3	\$117,590
Landscape and horticultural services	3	\$25,846
Accounting, tax, bookkeeping, and payroll	3	\$42,860
Retail - Clothing and accessories stores	3	\$24,513

Table 10 presents an estimate of the tax revenues generated at the local, state and federal level by the increased economic activity in Berkshire County generated by the Kripalu Center and its guests. As before, we have included a separate estimate of the increased property taxes

collected on residences that have been purchased by Kripalu visitors who have purchased second homes in the region and who have indicated that proximity was the primary or secondary reason for purchase of the home.

Table 10: Impacts on tax revenues

Source	State/Local	Federal	Total
Operations	\$5,283,310	\$5,400,947	\$10,684,257
Property taxes on second homes	\$2,216,955		\$2,216,955
Other taxes paid by visitors	\$182,013	\$214,505	\$396,518
Combined Impact	\$7,682,278	\$5,615,452	\$13,297,730

Table 10 indicates that the total tax revenues collected by state and local government from the increased economic activity in Berkshire County is essentially the same as would be generated by the increased economic activity in all of Massachusetts. The revenues collected by the federal government are less, with the difference reflecting in part the fact that some increase in economic activity would be expected to occur within Massachusetts but outside of Berkshire County, and the tax revenues generated by these activities are not being included in Table 10.

Table 11: Berkshire activities supported by Kripalu visitors

Institution or Activity	Percent
Lee Outlet Stores	6.53%
Outdoors (Hiking, Skiing, etc.)	4.93%
Tanglewood	4.86%
Norman Rockwell Museum	3.66%
Other	2.93%
MASS MoCA	2.47%
Clark Art Institute	2.27%
Theaters	2.13%
Jacob's Pillow	1.87%

The guests who come to Berkshire County to visit the Kripalu Center have the opportunity during an extended stay in the region to visit other destinations and engage in other activities that are part of the Berkshire County economy. A list of the most frequently mentioned other venues supported by visitors and the percent of survey respondents who said they engaged in this activity is presented in Table 11.

We have not undertaken a separate evaluation of the economic impact of support for these other institutions and amenities, although they play an important role in defining the identity of Berkshire County as a destination and are important to the local economy. Clearly it can be said that the presence of the Kripalu Center in the area is helping to sustain the broader constellation of institutions and activities that make the region attractive.

E. Detailed analytics and basis for evaluation

The estimates presented above are based on a level of operation and service production at the Kripalu Center that characterizes the baseline or *status quo*. This means that we must provide as input to the models a value of production and an industry or industries in which this production takes place.

To obtain this, we examined audited financial budgets for 2016 and 2017 provided by Kripalu. These suggest a current level of production and programming sustained by a 2017 budget of \$35,858,337. This budget allows the Center to produce several types of programs and services. Some are similar to the lodging and meals that would be produced in one of the other hotels and spas that are in Berkshire County. Other components of programming are essentially educational services providing training, inspiration, or information to participants. In addition to these functions and services the Center has an extensive retail facility that provides books, supplies, and decorative arts that are specially curated to appeal to Kripalu guests.

This identifies three economic sectors: Hotels (including spa hotels), Educational services, and Retail stores that are taken to be the sectors in which Kripalu production takes place. Through

analysis of the budget and employment data, we determined the split that is presented below in Table 12.

Table 12: Organization expenditures by industry sector

Sector	2016 Audit	2017 Estimate	Cost Share	Employee Share
Hotels and spas	\$22,012,525	\$22,393,342	62.45%	72.41%
Educational services	\$10,258,778	\$10,436,255	29.10%	20.26%
Retail - Miscellaneous	\$2,977,234	\$3,028,741	8.45%	7.33%
Total	\$35,248,537	\$35,858,337	100%	100%

Table 12 presents, in the column headed 2017 Estimate, the allocation of budgeted production in each economic sector used in the models above. These amounts were estimated using the descriptive allocations of budget detail provided in the audited financial reports.

The allocation to the retail sector is the most straightforward, being derived from the cost of goods sold in the retail shop, plus share of total employee salaries and benefits appropriate for the organization. The column headed Employee Share indicates the percentage of total employees in each economic sector, and the retail cost share and share of active employees correspond reasonably well.

The allocation to educational services is somewhat more complex because some of the costs of producing seminars and other programming arises from facilities and staff who are Kripalu employees, plus a significant additional cost arising from paying guest speakers and lecturers who provide some of the hundreds of programs made available at Kripalu. Because many of these speakers are not Kripalu employees, it is natural that the cost share for production of educational services is greater than the percentage of total active employees who appear to be primarily employed in this sector.

Finally, the cost share for production in the hotels and spas sector begins with the residual of all expenses not allocated to retail and production of educational services. Adjustments are

then made to this total to allocate some fraction of general administration and development costs to the other two sectors.

Such allocation inevitably involves some guesswork, and without detailed time logs for all employees it is impossible to tell with perfect accuracy what expenditure shares go to each economic sector. Modest differences in the allocation, however, make almost no difference to the estimated total output, employment and labor income impacts.

To evaluate the impacts of audience visitors we need to specify the number of guests coming to Kripalu from outside of the local economy. Fortunately, this can be done with relative accuracy because Kripalu provided counts of numbers of guests coming from each zip or postal code in 2017. This allows us to provide a very accurate count of the total number of visitors, the total number coming from outside of Massachusetts, and the total number coming from outside of Berkshire County.

Having determined the total number of guests from outside of the local economy, we need to be able to specify the impact of these visitors on the local economy. This is done by estimating local spending per visitor day in the local economy, and the average number of days spent in Berkshire County (and hence in Massachusetts) during their visit. We estimated this using an e-mail survey sent to a subset of 50,000 e-mail addresses drawn from the Kripalu database of participants and guests who have provided an e-mail for contact. The survey was sent out in late February of 2018 and valid responses were received over a 4-week period, although a majority of responses came in the first week.

The spatial distribution of responses from the survey is illustrated in Figure 2 below. This map shows the location of respondents from North America. There were a modest number of responses also received from Hawaii, Europe, the Far East and the Middle East. Altogether we received slightly more than 1700 responses for a response rate of just over 3.4%. While this is relatively low it is not unusual for e-mail surveys that have no payment associated with them.

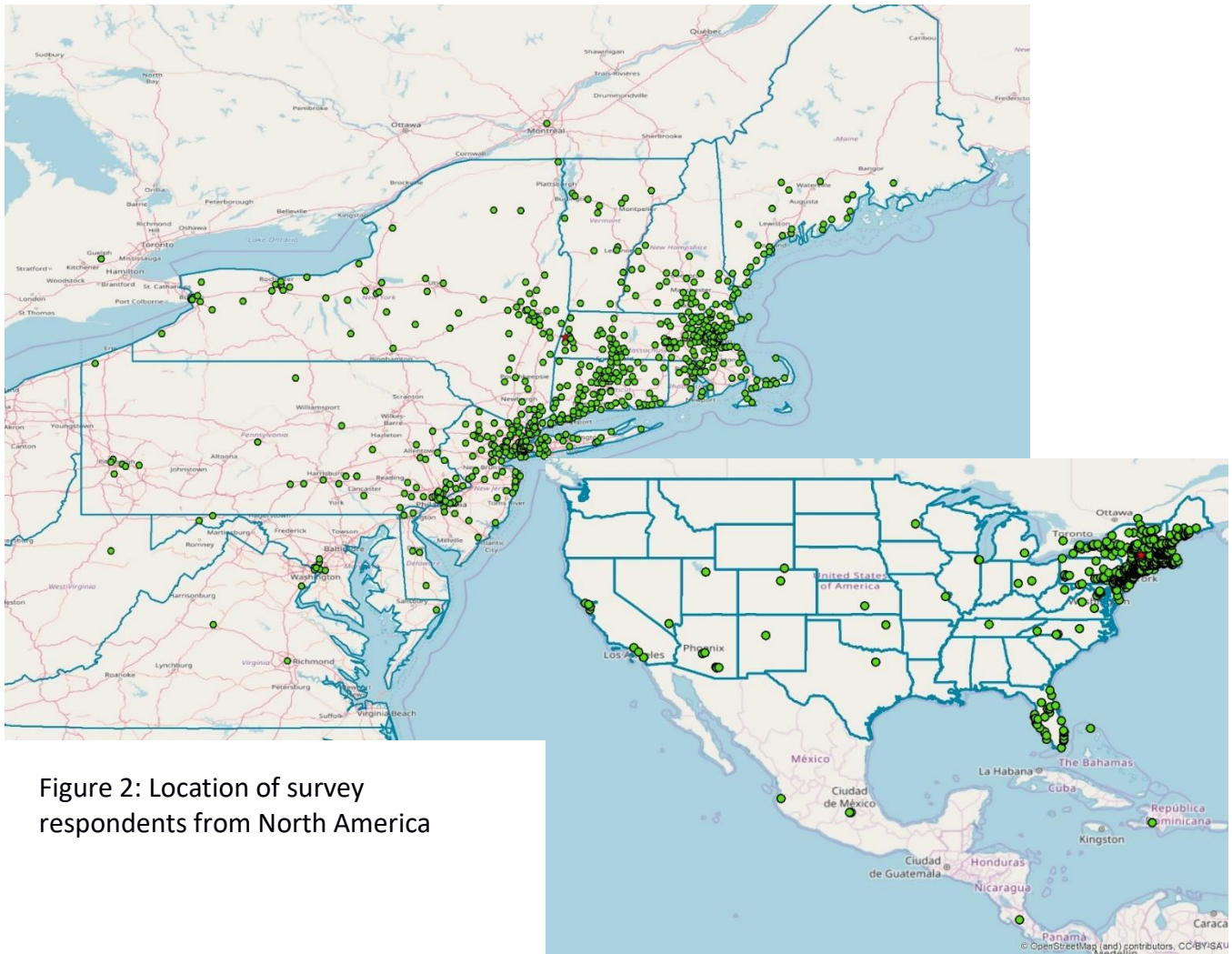


Figure 2: Location of survey respondents from North America

Table 13: Share of audience coming from outside of region

	All visitors	Outside MA	Outside Berkshire
Persons in Group	1.61	1.64	1.65
Visitor Days	4.31	4.75	4.68
Days in Berkshire	2.67	2.89	2.84
Percent (Survey)	100%	65%	96%
Percent (Kripalu)	100%	72%	97%
Total visitors	30553	21998	29735

The most relevant consideration is the extent to which the sample of survey respondents is representative of visitors to Kripalu. We have two observations to make that suggest the survey has provided a reasonably representative sample. First, as indicated in Table 13, the share of survey respondents coming from outside of the local economy comes relatively close to the

matching the spatial distribution of guests based on Kripalu's guest visitor database. The match is almost perfect (within 1%) for visitors from outside of Berkshire County. The match is reasonably close (a 7% difference) for respondents coming from outside of Massachusetts. Survey recipients from within the state seemed to have a somewhat higher propensity to respond (perhaps because they have an interest in the economic impact of Kripalu, which was identified as the reason for the survey).

A second indication that the survey is reasonably representative of visitor impact on the local economy arises through comparison with similar surveys of local visitor spending. The Kripalu guest survey estimated average guest spending in 5 categories summarized in Table 14. These figures are adjusted for average group size and average length of stay reported in Table 13, and provide our best estimate of local spending outside of Kripalu by guests coming to visit the Center.

Table 14: Expenditures per audience member

Category	<i>Source of visitor</i>		
	All	Outside MA	Outside Berkshire
Lodging	\$16.23	\$17.35	\$19.01
Meals	\$4.11	\$4.92	\$4.89
Retail	\$12.62	\$13.87	\$14.56
Service	\$8.85	\$10.23	\$10.81
Transport	\$18.96	\$22.63	\$23.02
Total	\$60.77	\$69.00	\$72.29

These calculations correspond well to figures collected on visitor spending and length of stay for Tanglewood visitors in a survey conducted for the BSO in 2017. That survey indicated that the typical Tanglewood audience member remained in the Berkshires for slightly longer than the typical Kripalu visitor, with a Tanglewood guest staying just over 3 days on average compared to the 2.8 to 2.9 days spent by a Kripalu guest.

Of course, we expect the average Tanglewood visitor to spend somewhat more per visit outside of Tanglewood itself, since Tanglewood is not providing accommodation as part of the Tanglewood concert. The Tanglewood survey estimated that the average Tanglewood

audience member spends about \$125 per visit, including \$90 per visit on food and lodging. If the average Kripalu guest spent this much on food and lodging outside of Kripalu, their spending per visit would be over \$135 per visit, slightly more than is spent by the average Tanglewood visitor but, adjusting for inflation, well within a reasonable margin of error.

In calculating the impacts of Kripalu visitors, then, we use the expenditures per guest in the 5 economic sectors reported in Table 14, multiplied by the number of visitors from outside of the local economy, reported in the final row of Table 13.

A final remark is in order concerning the accuracy of the overall modeling approach used in this analysis. Several papers have compared the inter-industry approach that we take (and the data sources we use) with alternative modeling approaches and data sources. These include both alternative commercial products and data providers, as well as direct use of data collected by the Bureau of Economic Analysis (whose periodic surveys of establishments and input purchases are the original source for the data on the structure of the local economy). These surveys have found that the approach we use is equal or superior to alternative approaches in terms of accuracy. Furthermore, when our modeling approach is used to evaluate and predict the impact of changes in employment that would be associated with an expansion of a cultural facility or contraction of a health care organization, the predictions have been within 5% - 10% of the change in employment measured for the surrounding local economy. Since local changes in total employment are measured with greater accuracy than local incomes or total economic output, this is a good way to evaluate the reliability of the modeling approach.

What does this mean in the current application? Analysis such as presented above is an estimate based on a model. Its accuracy is dependent on the quality of the data used and the appropriateness of



the model. Based on experience of application in this region with somewhat similar organizations, it is reasonable to expect that the impacts are within +/- 5% of those estimated and reported. We can be virtually certain that the true impacts would be within +/- 10%.

F. Conclusion

The Kripalu Center for Yoga & Health has gained a regional and national reputation providing training, seminars, and therapy on the practice of yoga and several other approaches to well-being and health. This reputation has allowed the Center to grow and develop to provide extensive programming and experiences to over 30,000 guests who travel to the facility in Berkshire County, Massachusetts. This growth and the demand for the experience and programming have made the Kripalu Center the fifth largest not-for-profit organization in a local economy where such organizations are playing an increasingly foundational role in providing employment and generating economic output.

Analysis of the impacts of the Kripalu Center indicates that it is directly or indirectly generating over \$64 million per year in total economic output, approximately \$56 million in the Berkshire County local economy and the residual in the state of Massachusetts. Kripalu is the direct or indirect source of employment for as many as 670 persons, generating \$27 million in labor income for the Massachusetts economy and \$22 million in Berkshire County itself. These jobs occur in hundreds of economic sectors ranging from restaurants and lodging providers to health care, real estate, and business services.

The Kripalu Center directly or indirectly generates tax revenues, providing about \$7.5 million each year for state and local governments including over \$2.2 million in local property taxes on residences that have been purchased and are maintained in whole or in part to be close to the Center. Kripalu guests also visit and thereby help to support several local cultural and recreational resources.

Comparisons between different organizations with different missions and budget constraints should be approached with caution, but it may provide some context to compare the estimated impacts of the Kripalu Center with those of other important not-for-profit organizations in Berkshire County. The estimates presented above are 10%-15% larger than those estimated for the Massachusetts Museum of Contemporary Art and its visitors in 2017. Kripalu's economic impact would also be larger than would be expected for the Normal Rockwell Museum or the Austen Riggs Center.

Of course, the ultimate goals of the Kripalu Center and these other important institutions go well beyond the impact on the local economy. The comparative context is provided only to remind us that in the ways described in this report, the Kripalu Center is helping to promote and sustain the well-being of its community as well as the guests who come to visit.

G. Appendix: Impacts by individual sector

This appendix presents tables with individual sector impacts for the Massachusetts local economy and for the Berkshire local economy. The two tables present results for the 100 sectors with the largest impacts on total employment, sorted in decreasing order of impact.

For each sector, the tables list a brief description of the production that takes place in the sector, followed by the total output and employment impacts of Kripalu operations. This is followed in columns 4 and 5 by the output and employment impacts of non-local guests who travel to Kripalu. Finally, columns 6 through 9 list the combined impacts of operations and guest spending, providing measures of impact on total economic output, total labor income in the sector, total jobs, and the average income paid per worker in the sector.

The totals presented in the two tables are the sum of direct, indirect and induced impacts associated with the operations of the Kripalu Center, the guests who come to the Center, or the combination of the two.

Table 15: Sector impacts for Massachusetts

Description	Operations		Visitors		Combined			
	Output	Jobs	Output	Jobs	Output	Labor Income	Jobs	Ave Income
Total	\$62,346,503	628	\$1,690,184	19	\$64,036,686	\$27,171,324	647	\$42,008
Other educational services	\$10,793,007	259	\$2,571	0	\$10,795,578	\$6,761,364	259	\$26,118
Hotels and motels, including casino hotels	\$22,583,597	164	\$385,303	3	\$22,968,900	\$8,332,198	167	\$49,847
Retail - Miscellaneous store retailers	\$1,519,504	41	\$148,074	4	\$1,667,578	\$1,021,166	45	\$22,527
Real estate	\$2,455,139	9	\$85,684	0	\$2,540,823	\$357,766	10	\$36,414
Full-service restaurants	\$377,571	7	\$120,817	2	\$498,389	\$256,993	9	\$27,650
All other food and drinking places	\$332,426	7	\$7,324	0	\$339,750	\$234,473	7	\$33,353
Hospitals	\$1,044,583	7	\$29,830	0	\$1,074,413	\$600,312	7	\$89,634
Child day care services	\$80,064	2	\$229,023	4	\$309,087	\$191,043	6	\$32,019
Services to buildings	\$267,879	5	\$6,762	0	\$274,641	\$176,218	6	\$31,863
Limited-service restaurants	\$433,241	4	\$12,082	0	\$445,323	\$107,582	5	\$23,314
Retail - Food and beverage stores	\$256,464	4	\$7,241	0	\$263,705	\$131,800	4	\$29,839
Employment services	\$375,947	4	\$8,725	0	\$384,673	\$234,687	4	\$53,976
Wholesale trade	\$1,140,457	4	\$35,487	0	\$1,175,944	\$469,117	4	\$108,688
Offices of physicians	\$518,145	3	\$14,810	0	\$532,955	\$402,030	3	\$117,594
Individual and family services	\$117,766	3	\$3,370	0	\$121,135	\$97,312	3	\$30,902
Management of companies and enterprises	\$832,740	3	\$25,454	0	\$858,194	\$499,200	3	\$163,591
Retail - General merchandise stores	\$176,915	3	\$4,716	0	\$181,631	\$83,870	3	\$29,222
Management consulting services	\$421,005	3	\$8,819	0	\$429,824	\$305,043	3	\$109,937
Maintenance and repair of nonresidential structures	\$464,273	3	\$12,263	0	\$476,536	\$185,901	3	\$67,015
Colleges, universities, and professional schools	\$330,900	3	\$9,789	0	\$340,689	\$192,760	3	\$74,178
Home health care services	\$120,611	3	\$3,454	0	\$124,065	\$133,030	3	\$51,585
Advertising, public relations, and related services	\$623,538	2	\$14,866	0	\$638,404	\$218,386	2	\$88,478
Monetary authorities and depository credit intermediation	\$705,470	2	\$18,554	0	\$724,025	\$289,413	2	\$120,576
Accounting, bookkeeping, and payroll services	\$292,231	2	\$8,053	0	\$300,284	\$205,247	2	\$89,025
Other financial investment activities	\$541,186	2	\$17,796	0	\$558,982	\$260,276	2	\$117,943
Personal care services	\$74,492	2	\$2,129	0	\$76,621	\$69,947	2	\$31,745
Retail - Clothing and clothing accessories stores	\$156,523	2	\$4,260	0	\$160,783	\$63,059	2	\$30,020
Landscape and horticultural services	\$145,921	2	\$3,720	0	\$149,641	\$90,868	2	\$43,353
Insurance carriers	\$940,564	2	\$25,033	0	\$965,596	\$275,216	2	\$133,410

Description	Operations		Visitors		Combined			Ave Income
	Output	Jobs	Output	Jobs	Output	Labor Income	Jobs	
Nursing and community care facilities	\$140,880	2	\$4,024	0	\$144,904	\$88,900	2	\$45,138
Automotive repair and maintenance, except car washes	\$181,518	2	\$5,314	0	\$186,831	\$116,128	2	\$60,910
Legal services	\$395,529	2	\$10,287	0	\$405,817	\$186,843	2	\$100,037
Postal service	\$215,359	2	\$5,229	0	\$220,589	\$185,617	2	\$100,234
Insurance agencies, brokerages, and related activities	\$367,054	2	\$8,406	0	\$375,460	\$152,960	2	\$83,433
Other personal services	\$57,753	2	\$1,587	0	\$59,340	\$58,519	2	\$33,069
Independent artists, writers, and performers	\$65,351	2	\$2,414	0	\$67,765	\$37,840	2	\$21,602
Retail - Nonstore retailers	\$253,717	2	\$7,094	0	\$260,811	\$83,527	2	\$48,908
Retail - Gasoline stores	\$49,360	1	\$63,742	1	\$113,101	\$75,260	2	\$44,621
Offices of other health practitioners	\$155,331	2	\$4,443	0	\$159,774	\$104,508	2	\$64,363
Private households	\$23,916	2	\$684	0	\$24,601	\$24,581	2	\$15,203
Retail - Health and personal care stores	\$128,137	2	\$3,509	0	\$131,647	\$72,186	2	\$45,718
Retail - Building material and garden and supplies stores	\$142,760	1	\$3,850	0	\$146,610	\$73,667	1	\$49,576
Investigation and security services	\$81,098	1	\$1,772	0	\$82,870	\$58,566	1	\$40,014
Internet publishing and broadcasting and web search portals	\$780,874	1	\$11,899	0	\$792,773	\$228,370	1	\$162,243
Retail - Motor vehicle and parts dealers	\$143,733	1	\$4,167	0	\$147,900	\$89,087	1	\$67,366
Elementary and secondary schools	\$86,295	1	\$2,475	0	\$88,770	\$72,941	1	\$57,698
Offices of dentists	\$166,243	1	\$4,750	0	\$170,993	\$88,423	1	\$71,042
Transit and ground passenger transportation	\$91,346	1	\$2,416	0	\$93,761	\$42,930	1	\$34,863
Waste management and remediation services	\$267,941	1	\$5,774	0	\$273,715	\$96,972	1	\$79,057
Marketing research and all other misc services	\$104,475	1	\$2,917	0	\$107,392	\$81,028	1	\$68,389
Labor and civic organizations	\$78,193	1	\$2,230	0	\$80,424	\$30,207	1	\$25,697
Fitness and recreational sports centers	\$52,620	1	\$1,353	0	\$53,973	\$20,626	1	\$18,028
Other amusement and recreation industries	\$77,383	1	\$2,040	0	\$79,423	\$31,902	1	\$27,934
Couriers and messengers	\$109,368	1	\$3,150	0	\$112,518	\$39,466	1	\$35,673
Outpatient care centers	\$190,051	1	\$5,433	0	\$195,484	\$80,650	1	\$74,566
Retail - Sporting goods, hobby, musical instrument and book	\$50,182	1	\$1,374	0	\$51,556	\$26,160	1	\$26,785
Architectural, engineering, and related services	\$174,753	1	\$4,439	0	\$179,192	\$102,138	1	\$105,232
Printing	\$177,364	1	\$3,671	0	\$181,035	\$69,027	1	\$74,410
Nondepository credit intermediation and related activities	\$186,405	1	\$4,889	0	\$191,294	\$105,983	1	\$116,153
Dry-cleaning and laundry services	\$55,926	1	\$1,437	0	\$57,363	\$31,179	1	\$35,680
Residential mental health, substance abuse and other	\$40,016	1	\$1,144	0	\$41,160	\$36,511	1	\$42,179
Environmental and other technical consulting services	\$88,618	1	\$1,877	0	\$90,494	\$90,140	1	\$105,799
Truck transportation	\$146,178	1	\$4,828	0	\$151,006	\$55,929	1	\$66,441

Description	Operations		Visitors		Combined			
	Output	Jobs	Output	Jobs	Output	Labor Income	Jobs	Ave Income
Office administrative services	\$68,816	1	\$1,418	0	\$70,233	\$54,681	1	\$66,504
Warehousing and storage	\$87,795	1	\$4,568	0	\$92,363	\$46,396	1	\$56,703
Other computer related services & facilities management	\$170,382	1	\$2,579	0	\$172,962	\$112,846	1	\$139,148
Business support services	\$50,960	1	\$1,467	0	\$52,427	\$37,719	1	\$46,527
Wired telecommunications carriers	\$354,246	1	\$8,768	0	\$363,015	\$92,701	1	\$114,536
Funds, trusts, and other financial vehicles	\$223,762	1	\$6,389	0	\$230,151	\$62,262	1	\$87,226
Maintenance and repair of residential structures	\$126,821	1	\$3,719	0	\$130,540	\$48,219	1	\$67,865
Newspaper publishers	\$100,682	1	\$2,368	0	\$103,050	\$43,106	1	\$61,070
Community food, housing, and other rehabilitation services	\$57,001	1	\$1,631	0	\$58,631	\$26,986	1	\$42,152
Retail - Furniture and home furnishings stores	\$61,382	1	\$1,650	0	\$63,032	\$29,461	1	\$46,429
Personal and household goods repair and maintenance	\$54,788	1	\$1,705	0	\$56,493	\$36,725	1	\$59,467
Securities and commodity intermediation and brokerage	\$126,308	1	\$3,178	0	\$129,486	\$141,251	1	\$231,741
Scenic and sightseeing transportation and support activities	\$92,880	1	\$2,699	0	\$95,579	\$39,037	1	\$66,620
Computer systems design services	\$88,700	1	\$2,300	0	\$91,000	\$78,304	1	\$140,655
Grantmaking, giving, and social advocacy organizations	\$81,331	1	\$2,321	0	\$83,652	\$32,256	1	\$58,537
Radio and television broadcasting	\$100,358	1	\$2,406	0	\$102,764	\$53,384	1	\$100,278
Retail - Electronics and appliance stores	\$28,961	1	\$777	0	\$29,738	\$27,862	1	\$53,314
Religious organizations	\$86,577	1	\$2,474	0	\$89,051	\$25,498	1	\$49,395
Travel arrangement and reservation services	\$107,489	0	\$2,464	0	\$109,953	\$39,617	0	\$79,848
Commercial and industrial machinery repair	\$76,112	0	\$2,390	0	\$78,502	\$41,606	0	\$90,951
Performing arts companies	\$58,148	0	\$1,548	0	\$59,696	\$15,950	0	\$35,548
Other ambulatory health care services	\$47,050	0	\$1,345	0	\$48,394	\$28,076	0	\$63,130
Promoters of performing arts and agents for public figures	\$48,526	0	\$1,423	0	\$49,948	\$13,077	0	\$30,377
Periodical publishers	\$143,163	0	\$2,935	0	\$146,098	\$39,925	0	\$93,154
Other support services	\$39,604	0	\$1,057	0	\$40,661	\$23,087	0	\$54,034
Data processing, hosting, and related services	\$130,580	0	\$3,794	0	\$134,374	\$54,856	0	\$134,433
Gambling industries (except casino hotels)	\$60,967	0	\$1,741	0	\$62,708	\$17,821	0	\$44,416
Specialized design services	\$40,963	0	\$1,239	0	\$42,202	\$25,980	0	\$65,554
Veterinary services	\$39,833	0	\$1,138	0	\$40,971	\$18,784	0	\$51,858
Automotive equipment rental and leasing	\$83,395	0	\$1,983	0	\$85,377	\$20,118	0	\$55,649
Air transportation	\$148,947	0	\$3,987	0	\$152,935	\$31,663	0	\$89,975
Bread and bakery product, except frozen, manufacturing	\$42,048	0	\$1,436	0	\$43,484	\$13,717	0	\$39,314
Commercial Sports Except Racing	\$50,046	0	\$1,331	0	\$51,377	\$37,672	0	\$112,003
Medical and diagnostic laboratories	\$40,603	0	\$1,160	0	\$41,763	\$27,677	0	\$83,253

Description	<i>Operations</i>		<i>Visitors</i>		<i>Combined</i>			Ave Income
	Output	Jobs	Output	Jobs	Output	Labor Income	Jobs	
Electric power transmission and distribution	\$478,394	0	\$13,461	0	\$491,856	\$54,213	0	\$165,271
Software publishers	\$136,732	0	\$2,987	0	\$139,719	\$51,229	0	\$161,173
Business and professional associations	\$62,291	0	\$1,348	0	\$63,640	\$26,738	0	\$84,277

Table 16: Sector impacts for Berkshire County

Description	Operations		Visitors		Combined			
	Output	Jobs	Output	Jobs	Output	Labor Income	Jobs	Ave Income
Total	\$54,066,824	646	\$2,099,185	28	\$56,166,009	\$22,239,701	675	\$32,962
Other educational services	\$10,787,491	257	\$3,282	0	\$10,790,773	\$6,807,606	257	\$26,456
Hotels and motels, including casino hotels	\$22,599,452	192	\$571,573	5	\$23,171,025	\$7,262,899	197	\$36,830
Retail - Miscellaneous store retailers	\$1,524,584	44	\$210,296	6	\$1,734,881	\$1,008,192	50	\$20,023
Full-service restaurants	\$342,147	7	\$162,149	3	\$504,296	\$228,003	11	\$21,594
Real estate	\$1,492,922	10	\$76,777	0	\$1,569,699	\$384,793	10	\$38,422
All other food and drinking places	\$337,408	8	\$10,475	0	\$347,883	\$218,581	8	\$26,850
Child day care services	\$50,076	1	\$325,897	7	\$375,973	\$219,815	8	\$27,448
Hospitals	\$943,828	6	\$38,435	0	\$982,264	\$554,252	6	\$91,775
Services to buildings	\$156,428	5	\$5,673	0	\$162,101	\$74,487	5	\$13,945
Limited-service restaurants	\$452,633	5	\$17,978	0	\$470,611	\$103,826	5	\$19,663
Retail - Food and beverage stores	\$234,944	4	\$9,439	0	\$244,383	\$122,369	4	\$30,167
Retail - General merchandise stores	\$222,686	4	\$8,402	0	\$231,087	\$102,951	4	\$27,201
Maintenance and repair of nonresidential structures	\$493,475	3	\$18,738	0	\$512,213	\$175,584	3	\$51,893
Individual and family services	\$100,218	3	\$4,092	0	\$104,310	\$78,585	3	\$24,610
Monetary authorities and depository credit	\$709,847	3	\$26,896	0	\$736,743	\$255,620	3	\$81,535
Offices of physicians	\$443,824	3	\$18,094	0	\$461,919	\$348,393	3	\$117,590
Landscape and horticultural services	\$147,575	3	\$5,403	0	\$152,979	\$76,461	3	\$25,846
Accounting, bookkeeping, and payroll services	\$197,229	3	\$7,953	0	\$205,182	\$119,849	3	\$42,860
Retail - Clothing and clothing accessories stores	\$168,569	2	\$6,499	0	\$175,069	\$61,743	3	\$24,513
Home health care services	\$95,910	2	\$3,923	0	\$99,833	\$99,175	2	\$40,530
Personal care services	\$77,546	2	\$3,162	0	\$80,708	\$61,630	2	\$25,749
Automotive repair and maintenance, except car washes	\$196,158	2	\$8,223	0	\$204,381	\$114,942	2	\$48,077
Retail - Nonstore retailers	\$273,384	2	\$10,864	0	\$284,248	\$74,726	2	\$33,115
Retail - Gasoline stores	\$52,618	1	\$87,825	1	\$140,443	\$88,390	2	\$39,381
Wholesale trade	\$437,276	2	\$19,919	0	\$457,195	\$137,748	2	\$61,984
Colleges, universities, and professional schools	\$257,225	2	\$10,974	0	\$268,199	\$146,596	2	\$67,655
Other financial investment activities	\$272,796	2	\$13,287	0	\$286,084	\$36,533	2	\$16,940
Nursing and community care facilities	\$150,561	2	\$6,129	0	\$156,689	\$95,806	2	\$44,753
Postal service	\$217,655	2	\$7,500	0	\$225,155	\$185,737	2	\$88,109

Description	Operations		Visitors		Combined			
	Output	Jobs	Output	Jobs	Output	Labor Income	Jobs	Ave Income
Employment services	\$118,182	2	\$3,981	0	\$122,163	\$66,460	2	\$32,485
Independent artists, writers, and performers	\$61,078	2	\$3,400	0	\$64,478	\$31,382	2	\$16,117
Insurance carriers	\$779,964	2	\$29,648	0	\$809,612	\$201,466	2	\$104,071
Other personal services	\$61,864	2	\$2,414	0	\$64,279	\$44,655	2	\$24,003
Retail - Building material and garden supplies stores	\$167,054	2	\$6,375	0	\$173,429	\$86,179	2	\$48,625
Private households	\$24,180	2	\$988	0	\$25,168	\$25,148	2	\$14,201
Legal services	\$201,051	2	\$7,498	0	\$208,550	\$70,829	2	\$41,619
Insurance agencies, brokerages, and related activities	\$279,463	2	\$9,049	0	\$288,512	\$99,345	2	\$60,843
Newspaper publishers	\$166,806	2	\$5,645	0	\$172,450	\$59,650	2	\$37,407
Transit and ground passenger transportation	\$85,236	1	\$3,231	0	\$88,467	\$31,576	1	\$21,261
Offices of other health practitioners	\$124,497	1	\$5,081	0	\$129,579	\$83,008	1	\$57,029
Office administrative services	\$129,211	1	\$3,832	0	\$133,043	\$105,186	1	\$73,553
Printing	\$231,765	1	\$7,947	0	\$239,712	\$82,314	1	\$60,773
Retail - Motor vehicle and parts dealers	\$122,177	1	\$5,065	0	\$127,242	\$69,437	1	\$51,357
Retail - Health and personal care stores	\$104,307	1	\$4,054	0	\$108,362	\$58,054	1	\$43,322
Advertising, public relations, and related services	\$185,989	1	\$6,405	0	\$192,394	\$39,388	1	\$29,926
Other amusement and recreation industries	\$75,664	1	\$2,813	0	\$78,477	\$28,686	1	\$22,651
Offices of dentists	\$151,309	1	\$6,165	0	\$157,475	\$78,181	1	\$63,202
Outpatient care centers	\$165,648	1	\$6,755	0	\$172,402	\$58,440	1	\$48,242
Management consulting services	\$102,258	1	\$3,056	0	\$105,314	\$47,635	1	\$39,450
Elementary and secondary schools	\$71,745	1	\$2,940	0	\$74,686	\$58,322	1	\$48,866
Marketing research and miscellaneous technical services	\$61,632	1	\$2,504	0	\$64,136	\$33,052	1	\$27,967
Labor and civic organizations	\$71,433	1	\$2,900	0	\$74,333	\$25,252	1	\$21,396
Retail - Sporting goods, hobby, musical instrument and books	\$54,490	1	\$2,116	0	\$56,605	\$26,513	1	\$22,472
Waste management and remediation services	\$263,133	1	\$8,165	0	\$271,297	\$109,546	1	\$93,992
Religious organizations	\$172,125	1	\$7,014	0	\$179,139	\$37,073	1	\$32,105
Management of companies and enterprises	\$196,966	1	\$8,712	0	\$205,678	\$87,383	1	\$77,882
Architectural, engineering, and related services	\$162,011	1	\$5,861	0	\$167,872	\$89,763	1	\$91,210
Dry-cleaning and laundry services	\$63,814	1	\$2,326	0	\$66,140	\$37,167	1	\$38,496
Residential mental health, substance abuse and other facilities	\$37,940	1	\$1,547	0	\$39,487	\$33,556	1	\$36,406
Gambling industries (except casino hotels)	\$120,810	1	\$4,919	0	\$125,729	\$30,591	1	\$34,394
Internet publishing and broadcasting and web search portals	\$387,116	1	\$7,960	0	\$395,076	\$55,645	1	\$64,002
Wired telecommunications carriers	\$301,553	1	\$10,722	0	\$312,275	\$66,498	1	\$82,020
Personal and household goods repair and maintenance	\$62,549	1	\$2,823	0	\$65,372	\$40,146	1	\$49,610

Description	Operations		Visitors		Combined			
	Output	Jobs	Output	Jobs	Output	Labor Income	Jobs	Ave Income
Retail - Furniture and home furnishings stores	\$65,201	1	\$2,480	0	\$67,681	\$27,579	1	\$34,742
Fitness and recreational sports centers	\$29,325	1	\$1,061	0	\$30,386	\$9,744	1	\$12,501
Periodical publishers	\$195,265	1	\$5,750	0	\$201,016	\$42,485	1	\$55,078
Maintenance and repair construction of residential structures	\$112,718	1	\$4,760	0	\$117,478	\$37,666	1	\$52,303
Environmental and other technical consulting services	\$43,687	1	\$1,327	0	\$45,013	\$26,916	1	\$38,510
Couriers and messengers	\$39,464	1	\$1,650	0	\$41,113	\$4,783	1	\$7,481
Business support services	\$22,428	1	\$941	0	\$23,369	\$10,665	1	\$16,772
Grantmaking, giving, and social advocacy organizations	\$78,084	1	\$3,179	0	\$81,264	\$26,054	1	\$41,735
Travel arrangement and reservation services	\$97,759	1	\$3,090	0	\$100,849	\$24,392	1	\$39,659
Community food, housing, and rehabilitation services	\$50,522	1	\$2,062	0	\$52,584	\$23,080	1	\$37,921
Funds, trusts, and other financial vehicles	\$154,092	1	\$6,285	0	\$160,377	\$24,674	1	\$43,192
Performing arts companies	\$66,009	1	\$2,472	0	\$68,482	\$15,720	1	\$28,462
Retail - Electronics and appliance stores	\$24,597	1	\$935	0	\$25,532	\$18,340	1	\$33,258
Specialized design services	\$31,409	0	\$1,443	0	\$32,852	\$13,642	1	\$26,398
Securities and commodity contracts and brokerage	\$45,525	0	\$1,672	0	\$47,198	\$23,901	1	\$47,253
Other ambulatory health care services	\$44,273	0	\$1,805	0	\$46,078	\$24,059	0	\$48,380
Radio and television broadcasting	\$85,041	0	\$2,940	0	\$87,981	\$23,619	0	\$47,984
Promoters of performing arts and agents for public figures	\$50,389	0	\$2,161	0	\$52,551	\$12,298	0	\$25,520
Commercial Sports Except Racing	\$23,962	0	\$914	0	\$24,876	\$11,423	0	\$24,493
Truck transportation	\$72,109	0	\$3,464	0	\$75,574	\$26,417	0	\$59,121
Investigation and security services	\$13,299	0	\$419	0	\$13,718	\$7,479	0	\$18,658
Veterinary services	\$41,006	0	\$1,672	0	\$42,677	\$18,772	0	\$47,886
Other computer related services, and facilities management	\$41,699	0	\$862	0	\$42,561	\$18,425	0	\$47,790
Other local government enterprises	\$45,653	0	\$1,984	0	\$47,637	\$33,573	0	\$101,721
Amusement parks and arcades	\$18,444	0	\$599	0	\$19,043	\$7,012	0	\$22,375
Motion picture and video industries	\$41,672	0	\$1,477	0	\$43,149	\$6,404	0	\$21,700
General and consumer goods rental except video	\$31,315	0	\$1,172	0	\$32,487	\$22,595	0	\$81,296
Electric power transmission and distribution	\$356,577	0	\$14,224	0	\$370,801	\$36,584	0	\$140,339
Commercial and industrial machinery repair and maintenance	\$30,888	0	\$1,401	0	\$32,289	\$14,641	0	\$57,675
Photographic services	\$13,358	0	\$537	0	\$13,896	\$7,038	0	\$28,249
Nondepository credit intermediation and related activities	\$58,521	0	\$2,188	0	\$60,710	\$38,089	0	\$157,471
Air transportation	\$87,399	0	\$3,355	0	\$90,753	\$13,717	0	\$58,756
Bowling centers	\$8,744	0	\$340	0	\$9,084	\$2,491	0	\$12,359
Museums, historical sites, zoos, and parks	\$16,287	0	\$664	0	\$16,951	\$9,468	0	\$47,533

Description	Operations		Visitors		Combined			Ave Income
	Output	Jobs	Output	Jobs	Output	Labor Income	Jobs	
Scenic and sightseeing transportation and support activities	\$27,981	0	\$1,183	0	\$29,165	\$10,984	0	\$56,102
Computer systems design services	\$19,369	0	\$734	0	\$20,102	\$12,667	0	\$64,740