



PROSPERITY PARTNERSHIP REGIONAL ECONOMIC STRATEGY

Tourism and Visitor Working Group
Meeting #3, September 10, 2008

Employment Data Analysis, Part II

Employment by Industry, 2002-2007

NAICS Code	Industry Description	Employment		% of Cluster Emp. In 2007	Emp. Change, 2002-07	
		2002	2007		Number Jobs	Annual Avg % Change
722100	Full-Service Restaurants	49,611	58,379	53.7%	8,768	3%
721110	Hotels (except Casino Hotels) and Motels	13,454	15,321	14.1%	1,867	3%
713210	Casinos	5,953	6,600	6.1%	647	2%
561500	Travel Arrangement and Reservation Services	3,879	4,616	4.2%	737	4%
722400	Drinking Places (Alcoholic Beverages)	4,157	4,485	4.1%	328	2%
713290	Other Gambling Industries	1,252	4,442	4.1%	3,190	29%
713910	Golf Courses and Country Clubs	2,559	2,860	2.6%	301	2%
711100	Performing Arts Companies	2,904	2,652	2.4%	-252	-2%
713990	All Other Amusement and Rec. Industries	1,906	2,366	2.2%	460	4%
712000	Museums, Hist. Stes, Similar Institutions	1,584	1,824	1.7%	240	3%
711200	Spectator Sports	1,224	1,502	1.4%	278	4%
485900	Other Transit and Ground Passenger Transp.	1,459	1,451	1.3%	-8	0%
487000	Scenic and Sightseeing Transportation	349	714	0.7%	365	15%
713100	Amusement Parks and Arcades	577	484	0.4%	-93	-3%
711500	Independent Artists, Writers, and Performers	458	351	0.3%	-107	-5%
713930	Marinas	264	318	0.3%	54	4%
721200	RV Parks and Recreational Camps	172	261	0.2%	89	9%
721199	All Other Traveler Accommodation	56	79	0.1%	23	7%
721191	Bed-and-Breakfast Inns	85	61	0.1%	-24	-6%
Total Tourism & Visitor Cluster		91,903	108,766	100.0%	16,863	3%

- Other Gambling employment actually increased significantly
- Performing Arts lost 252 jobs over the six-year period

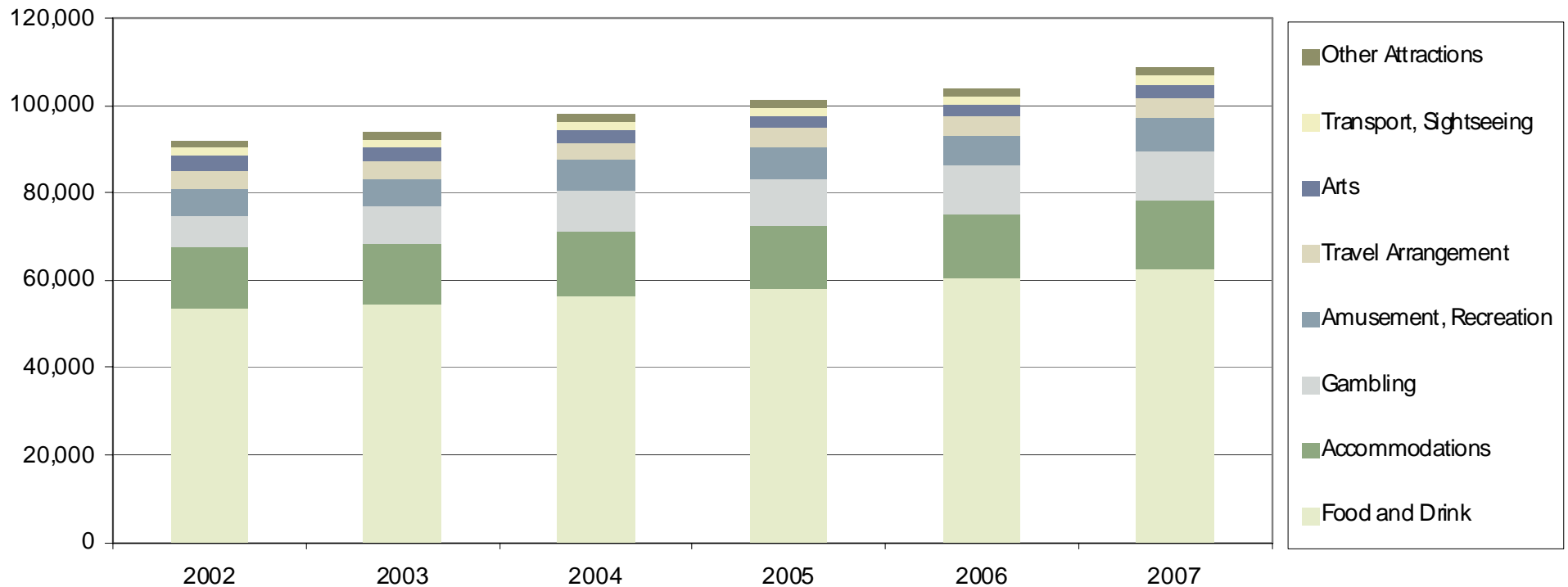
Aggregated Industry Employment

Industry	Employment in the Puget Sound Region						Avg. Annual Growth Rate
	2002	2003	2004	2005	2006	2007	2002-2007
Food and Drink	53,768	54,370	56,401	58,088	60,541	62,864	3.2%
Accommodations	13,767	14,226	14,614	14,498	14,828	15,722	2.7%
Gambling	7,205	8,362	9,569	10,842	10,842	11,042	8.9%
Amusement, Recreation	6,530	6,551	6,989	7,153	6,726	7,530	2.9%
Travel Arrangement	3,879	3,715	3,820	4,308	4,591	4,616	3.5%
Arts	3,362	3,076	3,014	2,933	3,023	3,003	-2.2%
Transport, Sightseeing	1,808	1,846	1,920	1,820	1,590	2,165	3.7%
Other Attractions	1,584	1,692	1,911	1,776	1,742	1,824	2.9%
Total Cluster	91,903	93,838	98,238	101,418	103,883	108,766	3.4%

- Gambling grew by about 3,800 employees – almost 9% annually
- Overall the cluster grew faster (3.4% annual avg.) than total employment in the Central Puget Sound (1.8%) and Tourism & Visitor industries statewide (2.8%)

Aggregated Industry Employment

Employment



Employment and Wages by County, 2002-2007

	Employment		% of Cluster Emp. in 2007	Emp. Change, 2002-07		Total Wages 2006	Avg. Annual Wage/ Emp.
	2002	2007		Number Jobs	Avg. Annual % Change		
King County	62,896	73,374	67%	10,478	3.1%	\$2,110,005,000	\$30,500
Pierce County	13,498	15,824	15%	2,326	3.2%	\$293,149,000	\$18,800
Snohomish County	11,174	14,137	13%	2,963	4.8%	\$289,640,000	\$21,100
Kitsap County	4,335	5,431	5%	1,096	4.6%	\$96,384,000	\$17,900
Region Total	91,903	108,766	100%	16,863	3.4%	\$2,789,178,000	\$26,800
Washington State	139,984	160,880		20,896	2.8%	\$3,657,620,610	\$23,500

- In contrast to the 2006-07 table, Snohomish and Kitsap saw the most significant employment growth rates between 2002 and 2007
- The regional Cluster grew by almost 17,000 jobs over the six-year period

Location Quotients, 2002-2007

Industry	Location Quotient - Region vs. Nation						Avg. Annual Growth Rate
	2002	2003	2004	2005	2006	2007	2002-2007
Food and Drink	1.01	1.01	1.01	1.02	1.02	1.01	0.0%
Accommodations	0.77	0.79	0.81	0.79	0.79	0.80	0.8%
Gambling	4.32	5.17	5.63	6.19	6.29	5.94	6.6%
Amusement, Recreation	0.88	0.88	0.92	0.93	0.85	0.89	0.3%
Travel Arrangement	1.21	1.24	1.35	1.55	1.62	1.60	5.7%
Arts	1.72	1.56	1.57	1.54	1.52	1.45	-3.4%
Transport, Sightseeing	1.92	1.89	1.90	1.75	1.46	1.82	-1.1%
Other Attractions	1.18	1.25	1.41	1.27	1.22	1.20	0.3%
Total Cluster	1.05	1.06	1.09	1.10	1.09	1.09	0.7%

- ❑ Gambling and Travel Arrangement exhibited the fastest rates of LQ growth
- ❑ The Arts and Transportation/Sightseeing have strong LQs but have seen LQs decline since 2002

Industry Concentration, Growth and Size, 2002-2007

