



PROSPERITY PARTNERSHIP REGIONAL ECONOMIC STRATEGY

TOURISM AND VISITOR WORKING GROUP MEETING #2

Preliminary Data Analysis

1.0 EMPLOYMENT AND WAGES BY INDUSTRY

Exhibit 1 Tourism & Visitor Cluster Employment by Industry, 2006-2007

NAICS Code	Industry Description	Employment		% of Cluster Emp. In 2007	Emp. Change, 2006-07	
		2006	2007		Number Jobs	% Change
722100	Full-Service Restaurants	56,117	58,379	53.7%	2,262	4%
721110	Hotels (except Casino Hotels) and Motels	14,491	15,321	14.1%	830	6%
713210	Casinos (except Casino Hotels)	6,031	6,600	6.1%	569	9%
713290	Other Gambling Industries	4,811	4,442	4.1%	-369	-8%
561500	Travel Arrangement and Reservation Services	4,591	4,616	4.2%	25	1%
722400	Drinking Places (Alcoholic Beverages)	4,424	4,485	4.1%	61	1%
713910	Golf Courses and Country Clubs	2,748	2,860	2.6%	112	4%
711100	Performing Arts Companies	2,670	2,652	2.4%	-18	-1%
712000	Museums, Hist. Sites, Similar Institutions*	1,742	1,796	1.7%	54	3%
713990	All Other Amusement and Rec. Industries	1,665	2,366	2.2%	701	42%
711200	Spectator Sports	1,486	1,502	1.4%	16	1%
485900	Other Transit and Ground Passenger Transp.	1,231	1,451	1.3%	220	18%
713100	Amusement Parks and Arcades	497	484	0.4%	-13	-3%
487000	Scenic and Sightseeing Transportation*	359	713	0.7%	354	99%
711500	Independent Artists, Writers, and Performers	353	351	0.3%	-2	-1%
713930	Marinas	330	318	0.3%	-12	-4%
721200	RV Parks and Recreational Camps	230	261	0.2%	31	13%
721199	All Other Traveler Accommodation	63	79	0.1%	16	25%
721191	Bed-and-Breakfast Inns	44	61	0.1%	17	39%
Total Tourism & Visitor Cluster		103,883	108,766	100.0%	4,883	5%

Source: Puget Sound Regional Council, 2008

Notes: Employment totals represent covered employment for the month of March each year. The unit of measurement is jobs and part-time and temporary positions are included. 2007 employment numbers are preliminary and subject to revision.

* Small portions of employment in these two industries have been suppressed for confidentiality.

- Overall, the Tourism & Visitor Cluster has almost 109,000 jobs and grew by almost 5,000 jobs between 2006 and 2007.
- Over 58,000 jobs at full-service restaurants comprise the majority of cluster employment (54%).
- Industries experiencing significant growth include Sightseeing Transportation (354 jobs/99% increase), Other Amusement and Recreation (701 jobs/42% increase), and several of the smaller accommodations industries.

- The largest numbers of new jobs were created in Full-Service Restaurants (2,262 jobs), Hotels (830 jobs), and Casinos (569 jobs).
- The industry that experienced the most significant decline in jobs was Other Gambling, which declined by 8% (369 jobs).

**Exhibit 2
Tourism & Visitor Cluster Wages by Industry, 2006**

NAICS Code	Industry Description	Total Wages 2006	Avg. Annual Wage/Emp.
711200	Spectator Sports	\$ 351,161,000	\$ 236,300
561500	Travel Arrangement and Reservation Services	\$ 339,051,000	\$ 73,900
487000	Scenic and Sightseeing Transportation	\$ 15,756,000	\$ 43,900
711500	Independent Artists, Writers, and Performers	\$ 14,142,000	\$ 40,100
713210	Casinos (except Casino Hotels)	\$ 207,402,000	\$ 34,400
712000	Museums, Hist. Sites, Similar Institutions	\$ 57,550,000	\$ 33,000
711100	Performing Arts Companies	\$ 85,352,000	\$ 32,000
485900	Other Transit and Ground Passenger Transp.	\$ 33,562,000	\$ 27,300
713930	Marinas	\$ 8,776,000	\$ 26,600
713910	Golf Courses and Country Clubs	\$ 71,005,000	\$ 25,800
713290	Other Gambling Industries	\$ 123,769,000	\$ 25,700
721110	Hotels (except Casino Hotels) and Motels	\$ 366,902,000	\$ 25,300
713100	Amusement Parks and Arcades	\$ 10,319,000	\$ 20,800
721200	RV Parks and Recreational Camps	\$ 4,717,000	\$ 20,500
713990	All Other Amusement and Rec. Industries	\$ 31,390,000	\$ 18,900
721199	All Other Traveler Accommodation	\$ 1,182,000	\$ 18,800
722100	Full-Service Restaurants	\$ 1,002,770,000	\$ 17,900
721191	Bed-and-Breakfast Inns	\$ 674,000	\$ 15,300
722400	Drinking Places (Alcoholic Beverages)	\$ 63,700,000	\$ 14,400
Total Tourism & Visitor Cluster		\$ 2,789,179,000	\$ 26,800

Source: Puget Sound Regional Council, 2008

Note: Some totals may not sum exactly due to rounding.

- Overall, the average annual wage for a job in the Tourism & Visitor Cluster is \$26,800.
- The highest paying industries in the cluster include Spectator Sports (\$236,300) and Travel Arrangement and Reservation Services (\$73,900).
- The lowest average wages are found in several of the food services and accommodations industries, which likely include a higher concentration of part-time, temporary, and lower hourly wage jobs.

2.0 EMPLOYMENT AND WAGES BY COUNTY

Exhibit 3 Tourism & Visitor Cluster Employment and Wages by Industry, 2006-2007

	Employment		% of Cluster Emp. In 2007	Emp. Change, 2006-07		Total Wages 2006	Avg. Annual Wage/Emp.
	2006	2007		Number Jobs	% Change		
King County	69,194	73,374	67.5%	4,180	6.0%	\$2,110,005,000	\$30,500
Pierce County	15,580	15,824	14.5%	244	1.6%	\$293,149,000	\$18,800
Snohomish County	13,729	14,137	13.0%	408	3.0%	\$289,640,000	\$21,100
Kitsap County	5,380	5,431	5.0%	51	0.9%	\$96,384,000	\$17,900
Region Total	103,883	108,766	100.0%	4,883	4.7%	\$2,789,178,000	\$26,800
Washington State	155,720	160,880		5,160	3.3%	\$3,657,620,610	\$23,500

Source: Puget Sound Regional Council, 2008; Washington Employment Security Department, 2008

- Overall, the region has grown at a faster pace (4.7%) than the State (3.3%) and has an average wage (\$26,800) that is higher than the statewide average (\$23,500).
- King County comprises the majority of Tourism & Visitor jobs in the region (67%), has grown by the most in the past year (4,180 jobs at 6% growth rate), and has the highest average wages (\$30,500).

3.0 LOCATION QUOTIENT ANALYSIS

Exhibit 4 Tourism & Visitor Cluster Location Quotients by Industry, 2007

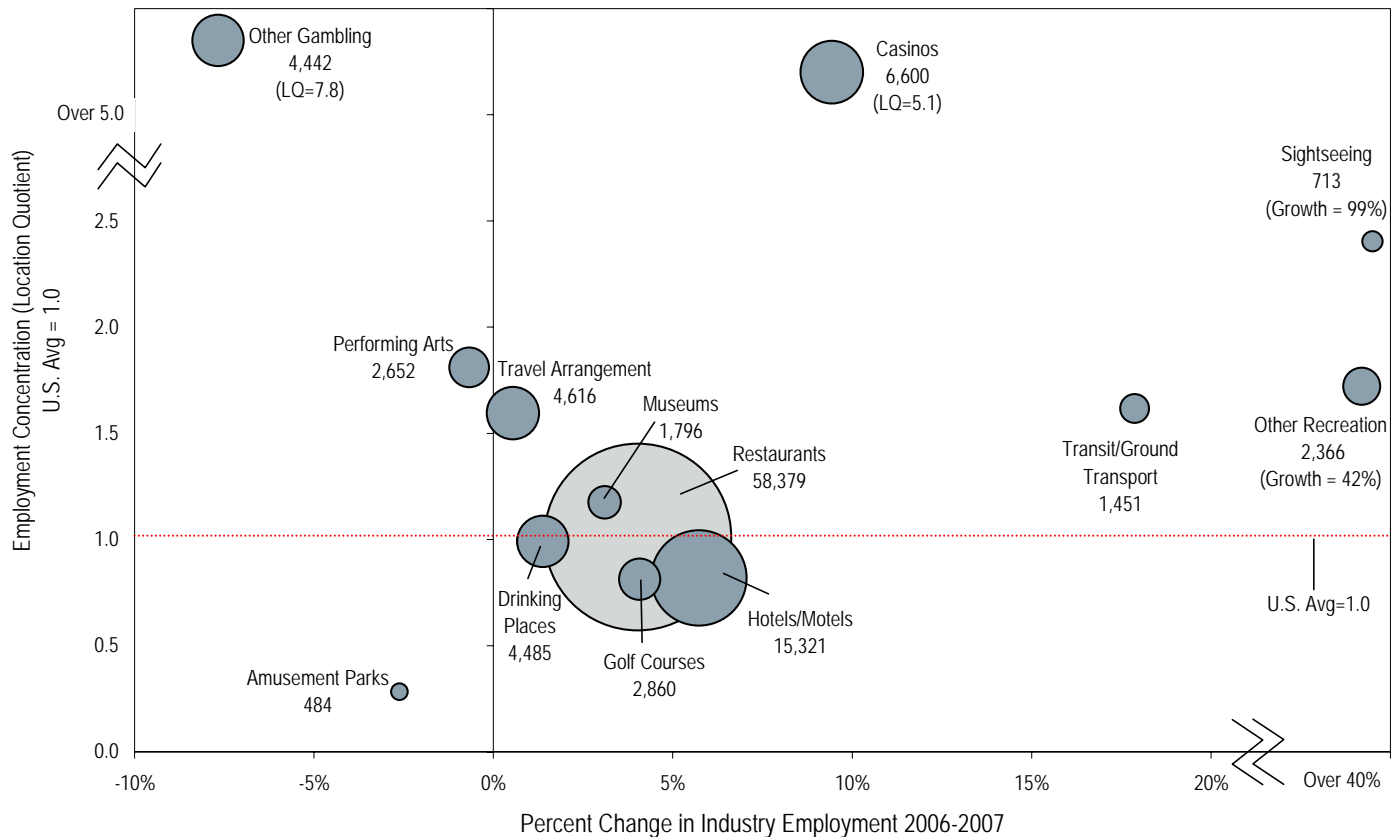
NAICS Code	Industry Description	Jobs 2007		Location Quotient Region vs. Nation
		Puget Sound	Nation	
713290	Other Gambling Industries	4,442	44,400	7.8
713210	Casinos (except Casino Hotels)	6,600	100,000	5.1
487000	Scenic and Sightseeing Transportation*	713	23,000	2.4
711100	Performing Arts Companies	2,652	113,600	1.8
713990	All Other Amusement and Rec. Industries	2,366	106,600	1.7
485900	Other Transit and Ground Passenger Transp.	1,451	69,600	1.6
561500	Travel Arrangement and Reservation Services	4,616	224,400	1.6
712000	Museums, Hist. Sites, Similar Institutions*	1,796	118,500	1.2
722100	Full-Service Restaurants	58,379	4,475,600	1.0
711200	Spectator Sports	1,502	117,200	1.0
722400	Drinking Places (Alcoholic Beverages)	4,485	351,000	1.0
713930	Marinas	318	27,000	0.9
721110	Hotels (except Casino Hotels) and Motels	15,321	1,452,400	0.8
713910	Golf Courses and Country Clubs	2,860	273,000	0.8
711500	Independent Artists, Writers, and Performers	351	47,100	0.6
721200	RV Parks and Recreational Camps	261	35,300	0.6
721199	All Other Traveler Accommodation	79	19,000	0.3
721191	Bed-and-Breakfast Inns	61	14,900	0.3
713100	Amusement Parks and Arcades	484	132,700	0.3
Total Tourism Cluster		108,766	7,745,300	1.1

Source: Puget Sound Regional Council, 2008; Bureau of Labor Statistics, 2008

Location quotients (LQs) are an index measure comparing the concentration of a particular industry in an area with the concentration of the same industry in a larger reference area. In **Exhibit 4**, the concentration of Tourism & Visitor industries (measured in jobs) in the four-county Central Puget Sound Region are compared to the concentration of Tourism & Visitor industries nationwide. If a LQ value is higher than 1.0 it indicates that the regional concentration of industries is greater than the national concentration.

- The Casinos and Other Gambling industries have extremely high LQs over 5.0, likely due to the large number of tribal gaming institutions in the state.
- Sightseeing Transportation, Performing Arts, Other Recreation, and Travel Arrangement Services all have strong LQs above 1.5.
- Several of the accommodation-related industries have relatively low LQ values ranging from 0.3 to 0.8.

Exhibit 5
Tourism & Visitor Cluster Employment Concentration, Change, and Size by Industry, 2006-2007



Source: Puget Sound Regional Council, 2008; Bureau of Labor Statistics, 2008

Note: Tourism & Visitor industries with fewer than 400 employees were not included in the chart.

- **Exhibit 5** presents industry concentration (in terms of LQs), change in jobs, and size (in terms of jobs) graphically.
- The majority of Tourism & Visitor industries experienced employment growth between 2006 and 2007. As mentioned earlier, only Other Gambling experienced a significant loss of jobs during this time period.
- Several of the largest industries like Restaurants and Hotels/Motels have LQs at or below the national average. Casinos and Other Gambling are the most highly concentrated larger industries in the Cluster.