



STATE OF WASHINGTON  
DEPARTMENT OF COMMUNITY,  
TRADE AND ECONOMIC DEVELOPMENT

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# Washington State Statewide Travel Impacts & Visitor Volume 1991-2003p

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## PREFACE

The purpose of this study is to document the economic significance of the travel industry in Washington state from 1991-2003. The estimates for 2003 are preliminary and subject to revision. These findings show the level of travel spending by those traveling to and through the state and the impact this spending has on the economy in terms of earnings, employment, and tax revenue.

This study was prepared for the Washington State Business and Tourism Development Unit of the Department of Community, Trade and Economic Development (CTED). Among the other Washington state agencies that contributed to this effort were the Department of Employment Security, Parks and Recreation Commission, and Department of Revenue. Special thanks are due to Betsy Gabel, Consumer Marketing Manager and the liaison for this project, and Peter McMillin, Managing Director of Business and Tourism Development, for their support and assistance.

## EXECUTIVE SUMMARY

This report describes the economic impacts of travel in Washington state from 1991 to 2003. The estimates for 2003 are preliminary:

- Travel spending in Washington state in 2003 is estimated at \$11.2 billion, generating \$3.5 billion in earnings and 139,200 jobs.
- Travel spending increased by 3.9 percent in 2003 over the preceding year. This is the first increase in visitor spending since 2000. Room sales increased by 3.8 percent, while spending on ground transportation and motor fuel increased by 13 percent, primarily due to higher gasoline prices.
- Room sales data (see graph on page 17) indicates that most of the increase in accommodation spending occurred in Seattle. The Seattle metro area experienced the steepest decline in travel spending following the drop in air travel and the events of September 11. Travel spending has remained essentially flat in the remainder of the state over this same period. In terms of inflation-adjusted constant dollars, travel spending in Washington state is still slightly below 2000 levels.
- Visitors staying in commercial accommodations such as hotels, motels, bed and breakfasts, and resorts spent more money than all other types of visitors. In 2003, these travelers spent \$4.4 billion in the state, almost half of all spending at visitor destinations.
- In 2003, visitors to Washington spent \$2.5 billion on food and beverages in restaurants, fast food establishments, and taverns. Visitors spent \$1.6 billion on retail purchases and \$1.5 billion on accommodations.
- In 2003, travel spending generated an estimated \$215 million in local tax revenue (room, sales, and auto rental taxes) and \$594 million in state tax revenues (sales, gasoline, auto rental, and business and occupation taxes).
- Total room tax collections in Washington state are estimated at \$83.5 million for the year 2003, up from \$79.9 million in 2002. The state-shared 2 percent tax accounted for 33 percent of the total, additional hotel/motel taxes levied by local governments accounted for 22 percent of the total, and the King County Convention Center Tax accounted for the remaining 45 percent.
- In 2003, visitors to Washington made 66.6 million trips and spent 146.9 million days in the state.
- In general, rural counties are more dependent on tourism than urban counties, even though the latter have higher absolute levels of tourism spending and travel-generated employment. The top ten counties with the highest proportion of travel-generated employment are rural.

## I. INTRODUCTION

This report describes the economic impacts of travel to and through the State of Washington from 1991 to 2003. The estimates for 2003 are preliminary and subject to revision. These estimates of the direct impacts associated with traveler spending in Washington were produced using the Regional Travel Impact Model (RTIM) developed by Dean Runyan Associates. The input data used to detail the economic impacts of the Washington travel industry were derived from various local, state, and federal sources. A primary objective of this research is to provide reliable, detailed figures that allow comparisons from year-to-year at the state and county levels. A description of the RTIM methodology is included in Appendix A.

### REVISIONS TO IMPACT ESTIMATES

There are two revisions to this year's report. Both are a consequence of the incorporation of the 1997 North American Industry Classification System (NAICS) into the RTIM methodology. NAICS is now used by the Bureau of Labor Statistics (BLS) to report payroll statistics and by the Bureau of Economic Analysis (BEA) to report earnings and total employment.<sup>1</sup> Prior to 2001, the 1997 Standard Industrial Classification (SIC) was the reporting scheme used by federal and state agencies. The conversion to NAICS has changed both our estimates of employment and earnings, and the way in which we now report our findings.

### Estimates of Employment and Earnings

The conversion to NAICS does not affect our estimates of travel spending. Our estimates of the tax receipts generated by travel spending are only minimally affected. However, the conversion to this system has altered our estimates of the employment and earnings generated by travel spending. The fact that specific industry groups under the NAICS scheme are not always comparable to those under SIC is one reason for the revised estimates. A second, more important reason is that the new classification scheme permits more reliable estimates from the BEA's employment and earnings data.

Because of these changes, all of our estimates of employment and earnings have been adjusted. Prior years have been revised to reflect these more current estimates. In general, employment is now somewhat lower, while earnings (and average annual earnings) are now somewhat higher. This is particularly true of the Accommodation and Food Services industry. Some other estimates, specific to particular industries and locales have also been adjusted.

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<sup>1</sup> The NAICS industries that comprise travel impact industries are defined in the appendix.

## Reporting Format

The format of the detailed impact tables has been changed this year to reflect the conversion to the NAICS system and to provide more meaningful industry estimates of earnings and employment.

The first three sections, *Visitor Spending by Type of Traveler Accommodation*, *Visitor Spending by Commodity Purchased*, and *Total Direct Travel Spending* provide the same information on visitor spending as in previous reports. Only the headings and organization have changed.

- *Visitor Spending by Type of Traveler Accommodation* refers to the total direct spending of each category of visitor at that destination (county or state). For example, the spending of visitors that stayed at hotels, motels, or B&B's includes their spending on accommodations, food & beverage service, recreation, and all other visitor related commodities.
- *Visitor Spending by Commodity Purchased* refers to the total spending on each commodity for all types of visitors. For example, the total spending on Food & Beverage Services includes spending by visitors staying in hotels, private campgrounds, private homes, and the other types of accommodation. The total spending on commodities is identical to the total spending by type of accommodation.
- *Total Direct Travel Spending* includes the total visitor spending at destination, described above, plus spending on air transportation. Total direct travel spending does not include secondary (indirect and induced) effects.

The next two sections, *Direct Travel-Generated Earnings by Industry* and *Direct Travel-Generated Employment by Industry*, provide estimates of travel-generated earnings and employment that are based on an industry, rather than a commodity, classification. A business that is classified in a particular industry may include more than one commodity. For example, a resort that is classified in the accommodation industry may provide accommodations, food and beverages, and recreation.

- *Direct Travel-Generated Earnings by Industry* includes the payroll, other earned benefits, and proprietor income of all employees in that industry classification.
- *Direct Travel-Generated Employment by Industry* includes all full- and part-time employees. This includes payroll employees covered by unemployment insurance and those that are not, as well as proprietors.

The final section, *Tax Revenues Generated by Travel Spending*, is identical to last year's report. Local taxes include all room taxes, local sales taxes, and local auto rental taxes. State taxes include the state sales tax, the state motor fuel tax, the state auto-rental tax, and the business and occupation tax.

## **TYPES OF TRAVEL IMPACTS INCLUDED**

Most of the travel that occurs in Washington is included in the scope of this analysis. All trips to Washington state by U.S. residents and foreign visitors are included. The travel of Washington residents to other destinations within Washington is included, provided that it is neither commuting nor other routine travel. Travel to non-Washington destinations by Washington residents is not included as a component of destination spending. Outbound air travel impacts are included in the air transportation category.

The impacts associated with both overnight and day travel are included if the travelers remain at the destination overnight or the destination is over 50 miles, one-way, from the traveler's home. These definitions are used to screen and, if necessary, to interpret and adjust local data used for travel impact measurements. The most conservative interpretation is employed where data limitations cause deviations from the above definition.

The terms “traveler” and “visitor” are used interchangeably in this report. Both represent a person who is traveling in the State of Washington, away from his or her home, on a trip as defined above. The purpose of such travel can be for business, pleasure, shopping, to attend meetings, or for personal, medical, or educational purposes.

## **AIR TRANSPORTATION AND TRAVEL ARRANGEMENT**

This analysis focuses on travel and tourism as a component of local and statewide economies, and therefore focuses on destination-specific impacts. However, some impacts associated with non-destination specific spending and employment are included. These non-destination-specific industries are air transportation and travel arrangement (travel agents and tour operators). These industries are classified as non-destination-specific because they provide services for travel to, through, and from specific destinations. It is important to note, however, that the impacts of these industries (e.g., employment) occur within specific geographic areas, primarily those with commercial airport facilities.

Fifteen counties in Washington had scheduled passenger air transportation in 2002. The associated employment impacts are allocated in this report to the county in which the employment is based. The associated spending impacts are also allocated to that county as non-destination spending. However, it is important to recognize that the benefits from air travel also extend to those counties that do not provide air transportation. This might include, for example, an overnight visitor in Jefferson County that traveled by air from Chicago to Seattle.

Because air transportation facilities provide travel services that benefit businesses throughout the state, it is appropriate to include air transportation as a component of the travel industry. But because of the regional character of air travel, it is sometimes useful to exclude this sector when analyzing local economic impacts. These considerations are, of course, most relevant with respect to King County, which

receives more than 95 percent of all direct, local impacts associated with air travel in the state.

### **DIRECT AND SECONDARY IMPACTS**

Economic impact measurements reported herein represent only direct economic impacts. Direct economic impacts include only the spending by travelers and the employment generated by that spending. Secondary effects related to the additional spending of businesses and employees are not included.

### **PRELIMINARY ESTIMATES**

Preliminary estimates for 2003 were prepared at the state level only. These estimates take advantage of the most current state level data for Washington and provide the timeliest measure of travel spending and the associated impacts in the state. While based on a consistent methodology and comparable data sources, full-year data was not available from all sources. In these cases, projections of state-level travel activity were made based on partial-year data.

Estimates produced using the state estimation method can differ from final county level impacts. The estimates produced by each method should be generally close, but not identical. Differences exist due to the availability of detailed county level data. Dean Runyan Associates and Washington State Business and Tourism Development may revise these estimates in the future as additional information relating to travel and its economic impact in 2003 becomes available.

### **IMPACT CATEGORIES**

The specific categories of travel impacts included in this analysis are as follows:

Impact Category	Description
Expenditures	Purchases by travelers during their trip, including lodging taxes and other applicable local and state taxes, paid by the traveler at the point of sale.
Total Earnings	The earnings (wage and salary disbursements, earned benefits, and proprietor income) of employees and owners of businesses that receive travel expenditures. Only the earnings attributable to travel expenditures are included; this typically is only a portion of all business receipts.
Employment	Employment associated with the above earnings; this includes both full- and part-time positions of wage and salary workers and proprietors.
Local Tax Receipts	Counties and municipal taxes levied on applicable travel-related purchases. Includes local sales taxes, auto rental taxes, and all transient occupancy taxes, including the 2 percent state shared tax, additional hotel/motel taxes, and the King County Convention Center tax (which is technically a state tax).
State Tax Receipts	State excise taxes such as sales, auto rental, and gasoline taxes attributable to travel expenditures, and business taxes levied on travel industry firms (i.e., B&O taxes).

## VISITOR CATEGORIES

Travelers are classified according to the type of accommodation in which they stay. The types of visitors are as follows:

Type of Visitor	Description
Hotel/Motel/B&B Guest	Travelers staying in hotels, motels, resorts, bed & breakfast establishments, and other commercial accommodations, excluding campgrounds, where a transient lodging tax is collected.
Private Camper	Travelers staying in a privately owned (i.e., commercial) campground.
Public Camper	Travelers staying in a publicly managed campground such as those managed by the Washington State Parks and Recreation Commission, the U.S. Forest Service, or the National Park Service.
Private Home Visitor	Travelers staying as guests with friends or relatives.
Vacation Home Visitor	Travelers using their own vacation home or timeshare and those borrowing or renting a vacation home where transient lodging tax is not collected.
Day Visitor	Both in-state and out-of-state residents whose trip does not include an overnight stay at a destination in Washington.

## INTERPRETATION OF IMPACT ESTIMATES

Users of this report should be aware of several issues regarding the interpretation of the impact estimates contained herein:

- When comparing the impact estimates associated with different locations or different time periods, it is more appropriate to focus on *spending at destination spending* (which excludes air transportation) rather than total travel spending.
- The estimates in this report are expressed in *current* dollars with the exception of the graph on page 9. There is no adjustment for inflation for all other spending estimates in this report.
- The employment estimates in this report are estimates of the total number of full- and part-time number of jobs directly generated by travel spending, rather than the number of individuals employed. Both payroll and self-employment is included in these estimates. Caution should therefore be used in comparing these estimates with other employment data series.
- In general, estimates of small geographic areas (e.g., rural counties) are less reliable than estimates for regions or metropolitan counties. Trend analysis and comparisons of counties with relatively low levels of travel related economic activity should therefore be interpreted cautiously.

- The estimates contained in this report are based on the most current data available and supersede all previous estimates of travel impacts.
- The estimates of travel impacts published in this report will necessarily differ somewhat from estimates generated from different models, methodologies, and data sources. Nonetheless, it should be emphasized that all credible estimates of direct travel impacts at the state level, including those of Dean Runyan Associates, are of similar magnitude.

## II. THE STATE



The multi-billion dollar travel industry in Washington is a vital part of the state and local economies. The industry is represented primarily by retail and service firms, including lodging establishments, restaurants, retail stores, gasoline service stations, and other types of businesses that sell their products and services to travelers. The money that visitors spend on various goods and services while in Washington produces business receipts at these firms, which in turn employ Washington residents and pay their wages and salaries. State and local government units benefit from travel as well. The state government collects taxes on the gross receipts of businesses operating in the state, as well as sales and use taxes levied on the sale of goods and services to travelers. Local governments also collect sales and use taxes generated from traveler purchases.

During 2003, visitor spending in Washington State increased by 3.9 percent over the preceding year (preliminary estimate). This is the first increase in visitor spending since 2000. Room sales increased by 3.8 percent, while spending on ground transportation and motor fuel increased by 13 percent, primarily due to higher gasoline prices. Room sales data (see graph on page 17) indicates that most of the increase in accommodation spending occurred in Seattle. The Seattle metro area experienced the steepest decline in travel spending following the drop in air travel and the events of September 11. Travel spending has remained essentially flat in the remainder of the state over this same period. In terms of inflation-adjusted constant dollars, travel spending in Washington state is still slightly below 2000 levels.

### Washington State Direct Travel Impacts, 1991-2003p

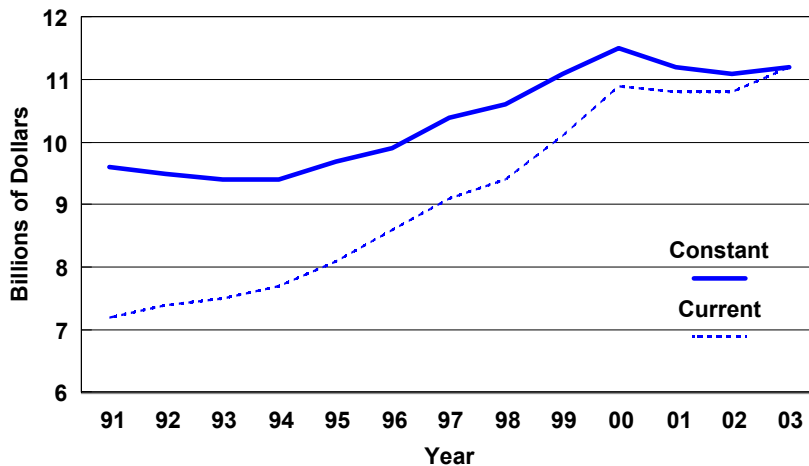
	Spending (\$ Billion)	Earnings (\$ Billion)	Employment (Thousand)	Tax Receipts (\$ Million)	
				Local	State
1991	7.2	2.1	130.2	91	359
1992	7.4	2.1	129.4	94	366
1993	7.5	2.2	131.3	101	390
1994	7.7	2.3	131.6	108	400
1995	8.1	2.4	134.6	118	431
1996	8.6	2.5	133.9	134	452
1997	9.1	2.7	137.7	155	479
1998	9.4	2.9	139.5	171	509
1999	10.1	3.1	142.4	187	533
2000	10.9	3.4	144.0	209	565
2001	10.8	3.4	145.0	208	572
2002	10.8	3.4	142.0	208	587
2003p	11.2	3.5	139.2	215	594
<i>Annual Percentage Change</i>					
02-03p	3.9	1.6	-2.0	3.3	1.1
91-03p	3.7	4.4	0.6	7.5	4.3

Note: p = preliminary. The percent change for 1991-2003p refers to the average annual percentage change. Direct Travel Impacts do not include secondary (indirect and induced) impacts. Airfares are included. Total Earnings include wage and salary disbursements, other earned income, and proprietor income. Employment includes full- and part-time payroll employees and proprietors.

Preliminary estimates of earnings show growth of only 1.6 percent over the past year. The low earnings growth is due to the prolonged recession and job contractions in travel-related businesses, as well as the fact that some travel dollars were spent on higher priced gasoline. Travel-generated employment declined for the second straight year primarily due to continuing employment reductions in the lodging industry and air transportation.

Despite the mixed picture for the travel industry in 2003, the modest increase in room sales and travel spending is encouraging. Future growth in travel spending and employment will fundamentally depend on the magnitude and duration of the recent expansion of the larger economy.

### Direct Travel Spending in Washington Adjusted for Inflation 1991-2003p

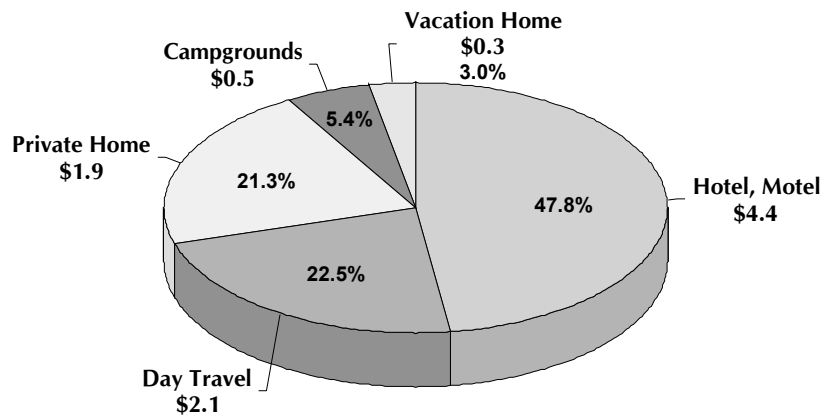


Note: Travel spending was deflated by a composite of price indices for the West Urban CPI and room rates reported by Wolfgang Rood Hospitality Consulting. The average annual increase in constant dollars for 1991-2003p is 1.3 percent. Direct travel spending includes airfares.

## VISITOR SPENDING BY TYPE OF TRAVELER ACCOMMODATION

Overnight travelers to Washington spend the night in a variety of accommodations, including resorts, hotels, motels, bed & breakfast establishments, campgrounds, vacation homes, and in the homes of friends and relatives. Travel impacts reported by the type of accommodation in which travelers stay reveal the relative contribution of each traveler type to total travel impacts.

### Visitor Spending at Washington State Destinations by Type of Accommodation, 2003p



Typically, the largest portion of total travel expenditures stems from visitors staying in commercial accommodations such as hotels, motels, and bed & breakfast establishments. As shown above, this is the case for travelers to Washington. In 2003, these travelers spent \$4.4 billion in the state, or 47.8 percent of spending at visitor destinations in the state. (Airfares are not included in this total.)

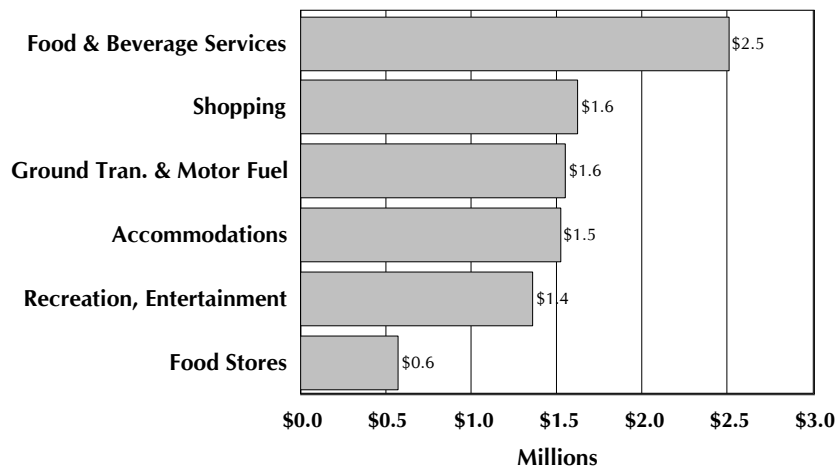
It is also important to note that private home visitors and day travelers – both of which require no paid overnight accommodations – made significant contributions to the state's economy. In 2003, spending associated with visitors staying with friends and relatives contributed \$1.9 billion to the state and local economies, and accounted for 21.3 percent of destination spending by travelers. Day travelers accounted for an additional 22.5 percent of destination spending.

Spending by campers and vacation home users, though less than that of other overnight visitors, is nonetheless significant in many rural areas of the state where camping is typically found. Campers staying in both public and private campgrounds spent \$500 million during 2003. Visitors staying in vacation homes or time-shares spent \$300 million in the state.

**VISITOR SPENDING BY COMMODITY PURCHASED**

Washington’s travel industry is composed primarily of retail and service firms representing a variety of businesses ranging from hotels, restaurants, airports, attractions, and car rental firms, to gasoline service stations, public transportation companies, museums, and grocery stores. Travel impacts, broken out by the type of business in which the travel expenditures occur, show the types of businesses in which visitors make their purchases.

**Visitor Spending at Washington State Destinations  
by Commodity Purchased, 2003p**

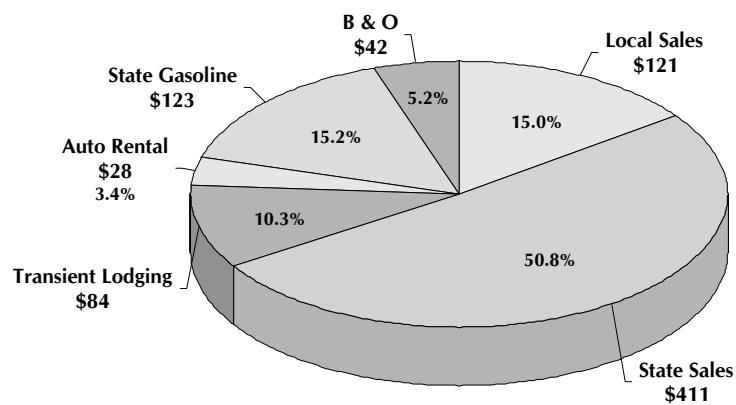


The largest share of travel spending occurred for food and beverage services. In 2003, visitors to Washington spent \$2.5 billion on food and beverages in restaurants, fast food establishments, and taverns. Spending on retail purchases by visitors was \$1.6 billion. Visitors also spent \$1.5 billion on accommodations (hotel and motel rooms, campgrounds, bed & breakfasts, vacation home rentals, and time-shares). Visitors spent \$1.6 billion on ground transportation, such as buses, taxis, rental cars, and motor fuel. Spending on recreation and entertainment (\$1.4 billion) includes outdoor activities, cultural events, and a variety of other types of entertainment.

## LOCAL AND STATE TAX REVENUES GENERATED BY TRAVEL SPENDING

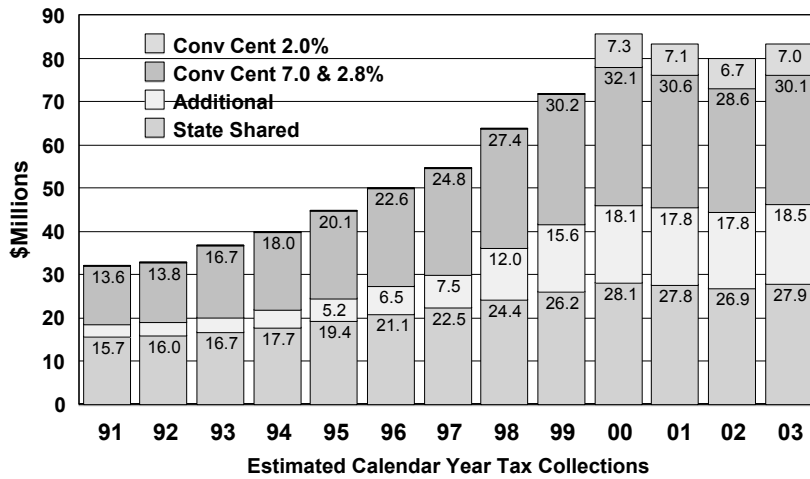
Tax receipts generated from travel spending totaled \$809 million in 2003. More than half of these tax receipts were attributable to the state sales tax (\$411 million). Local sales tax receipts (\$121 million) were the second highest category. Receipts from the state fuel tax on gasoline purchases (\$123 million) and room taxes (\$84 million) were also important sources of tax revenue.

**Tax Revenues Attributable to Travel Spending, 2003p**  
(\$ Million)



Tax collections on lodging are shown in the following graph. The state-shared 2 percent Hotel/Motel tax comprised about one-third of all room tax receipts in the state in 2003. The greatest portion of room tax receipts can be attributed to King County Convention Center taxes (44 percent). However, the special or additional room taxes levied by cities and counties have increased by the greatest amount in recent years. (A detailed breakout of room tax receipts by city and county can be found in the WASHINGTON STATE 1991-2002 COUNTY TRAVEL IMPACTS report.)

## Transient Lodging Tax Receipts in Washington State (1991-2003p Calendar Years)



Source: Washington State Department of Revenue and Dean Runyan Associates.

### EMPLOYMENT AND EARNINGS

Detailed earnings and employment estimates are shown in the table on page 14. The industry categories correspond to the NAICS scheme (see Appendix C). The industry estimates provided here generally correspond to the employment and earnings series reported by the U.S. Bureau of Economic Analysis' Regional Economic Information System (REIS), with some exceptions. Government employment is included in the industry categories listed here, whereas it is reported separately under REIS. This is particularly important for the arts, entertainment, and recreation category. In addition, the accommodation and food services industry, as defined here, includes real estate management services associated with commercial lodging and vacation home rentals. Finally, because the estimates of travel-generated earnings and employment are derived from the *spending* reported by visitors on *commodities*, there will necessarily be some divergence from earnings and employment as reported by *industry*.

## Detailed Travel-Generated Earnings and Employment Washington State, 2003p

Industry	Earnings (Millions)	Employment (Thousands)	Ave. Annual Earnings
Accommodations & Food Service	\$1,505.7	69.1	\$21,790
Accommodations	\$748.4	29.8	\$25,080
Food Service	\$606.7	32.3	\$18,760
Other Accom & Food Serv*	\$150.6	6.9	\$21,790
Arts, Entertainment & Recreation	\$677.0	36.2	\$18,700
Performing Arts, Spectator Sports	\$207.0	12.7	\$16,250
Museums	\$22.1	0.8	\$29,210
Amusement, Gambling	\$244.8	11.9	\$20,660
Other Entertain & Rec**	\$203.1	10.9	\$18,700
Retail	\$323.2	14.7	\$22,030
Food & Beverage Stores	\$92.5	3.3	\$28,120
Gasoline Stations	\$75.3	3.1	\$24,540
Other Retail***	\$155.4	8.3	\$18,690
Air Transportation	\$655.4	11.2	\$58,390
Travel Arrange. & Reserv. Services	\$264.9	5.9	\$45,210
Local Transportation	\$54.7	2.1	\$25,520
Auto Rental	\$35.6	1.3	\$27,680
Other Local Transportation	\$19.1	0.9	\$22,290
<b>All Direct Travel-Generated</b>	<b>\$3,481.0</b>	<b>139.2</b>	<b>\$25,010</b>

Note: \*Other Accommodations & Food Services includes real estate management services and government.

\*\*Other Entertainment & Recreation includes government.

\*\*\*Other Retail includes general merchandise stores; clothing stores; sporting goods stores; hobby, book and music stores; and miscellaneous retail stores.

## Washington State Direct Travel Impacts 1991-1997

	1991	1992	1993	1994	1995	1996	1997
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>							
Hotel, Motel, B&B	2,266	2,321	2,414	2,551	2,778	3,022	3,223
Private Campground	258	257	248	219	225	240	286
Public Campground	114	122	119	122	123	123	131
Private Home	1,219	1,290	1,345	1,392	1,447	1,516	1,576
Vacation Home	183	190	196	200	206	214	220
Day Travel	1,260	1,308	1,351	1,392	1,465	1,548	1,645
Spending at Destination	5,300	5,489	5,673	5,876	6,244	6,663	7,080
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	867	887	924	974	1,061	1,148	1,228
Food & Beverage Services	1,480	1,512	1,556	1,607	1,698	1,795	1,921
Food Stores	338	342	352	365	389	415	448
Ground Tran. & Motor Fuel	789	820	854	888	944	1,001	1,062
Recreation, Entertainment	796	828	861	894	950	1,007	1,070
Shopping	1,031	1,101	1,125	1,149	1,203	1,298	1,350
Spending at Destination	5,300	5,489	5,673	5,876	6,244	6,663	7,080
<b>Total Direct Travel Spending (\$Million)</b>							
Visitor Spending at Destination	5,300	5,489	5,673	5,876	6,244	6,663	7,080
Air Transportation	1,917	1,912	1,859	1,813	1,836	1,888	2,031
Total Direct Spending	7,217	7,401	7,532	7,689	8,080	8,551	9,111
<b>Travel-Generated Earnings by Industry (\$Million)</b>							
Accommodation & Food Services	853	872	900	935	1,000	1,071	1,132
Arts, Entertainment & Recreation	395	410	426	443	471	500	531
Retail (incl. Motor Fuel)	199	209	213	218	230	244	256
Air Transportation	487	489	490	490	490	485	521
Travel Arrangement Services	117	125	133	147	165	172	193
Auto Rental & other ground tran.	25	28	31	35	40	44	49
Total Direct Earnings	2,076	2,133	2,193	2,267	2,396	2,516	2,682
<b>Travel-Generated Employment by Industry (Thousand Jobs)</b>							
Accommodations & Food Service	63.5	62.9	63.7	63.4	65.4	65.5	67.0
Arts, Entertainment & Recreation	34.0	34.0	34.9	35.4	35.3	33.5	34.8
Retail (incl. Motor Fuel)	13.9	13.8	13.8	13.5	13.9	14.3	14.3
Air Transportation	11.1	11.0	10.8	10.6	10.7	10.6	11.1
Travel Arrangement Services	6.1	6.0	6.4	6.9	7.0	7.7	8.1
Auto Rental & other ground tran.	1.6	1.6	1.7	1.9	2.1	2.3	2.5
Total Direct Employment	130.2	129.4	131.3	131.6	134.6	133.9	137.7
<b>Tax Revenues Generated by Travel Spending (\$Million)</b>							
Local Taxes	91	94	101	108	118	134	155
State Taxes	359	366	390	400	431	452	479
Total Direct Taxes	449	460	491	508	549	586	634

Details may not add to totals due to rounding.

## Washington State Direct Travel Impacts 1998-2003p

	1998	1999	2000	2001	2002	2003p
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>						
Hotel, Motel, B&B	3,419	3,720	4,072	4,093	4,053	4,370
Private Campground	285	305	331	329	325	340
Public Campground	128	132	144	149	150	156
Private Home	1,601	1,698	1,842	1,907	1,924	1,947
Vacation Home	223	234	247	257	261	274
Day Travel	1,703	1,812	1,958	2,014	2,045	2,054
Spending at Destination	7,358	7,900	8,593	8,749	8,758	9,142
<b>Visitor Spending by Commodity Purchased (\$Million)</b>						
Accommodations	1,325	1,423	1,522	1,514	1,469	1,525
Food & Beverage Services	2,042	2,157	2,289	2,356	2,447	2,510
Food Stores	475	498	526	547	560	571
Ground Tran. & Motor Fuel	1,123	1,187	1,440	1,433	1,372	1,552
Recreation, Entertainment	1,131	1,196	1,276	1,316	1,340	1,362
Shopping	1,264	1,439	1,540	1,584	1,569	1,622
Spending at Destination	7,358	7,900	8,593	8,749	8,758	9,142
<b>Total Direct Travel Spending (\$Million)</b>						
Visitor Spending at Destination	7,358	7,900	8,593	8,749	8,758	9,142
Air Transportation	2,045	2,168	2,341	2,085	2,005	2,045
Total Direct Spending	9,403	10,069	10,934	10,834	10,763	11,188
<b>Travel-Generated Earnings by Industry (\$Million)</b>						
Accommodation & Food Services	1,235	1,324	1,430	1,435	1,495	1,506
Arts, Entertainment & Recreation	561	594	633	652	663	677
Retail (incl. Motor Fuel)	248	280	312	318	310	323
Air Transportation	555	582	647	660	643	655
Travel Arrangement Services	201	218	272	303	260	265
Auto Rental & other ground tran.	54	53	58	57	55	55
Total Direct Earnings	2,855	3,051	3,352	3,425	3,426	3,481
<b>Travel-Generated Employment by Industry (Thousand Jobs)</b>						
Accommodations & Food Service	68.3	69.5	69.9	70.2	71.1	69.1
Arts, Entertainment & Recreation	35.7	36.1	35.7	37.3	36.9	36.2
Retail (incl. Motor Fuel)	13.4	14.4	15.3	15.4	14.4	14.7
Air Transportation	11.3	12.0	12.5	12.5	11.6	11.2
Travel Arrangement Services	8.2	8.0	8.1	7.2	5.9	5.9
Auto Rental & other ground tran.	2.6	2.4	2.5	2.5	2.2	2.1
Total Direct Employment	139.5	142.4	144.0	145.0	142.0	139.2
<b>Tax Revenues Generated by Travel Spending (\$Million)</b>						
Local Taxes	171	187	209	208	208	215
State Taxes	509	533	565	572	587	594
Total Direct Taxes	680	720	773	780	795	809

Details may not add to totals due to rounding.

### III. THE REGIONS



Washington state naturally defines itself into three regions based on climate, geography, and other factors – the Coastal, Western, and Eastern regions. Because King County accounts for approximately two-thirds of the travel spending in the Western region, it is shown separately in order to provide a more meaningful picture of regional patterns.

Some of the important regional similarities and differences are:

- Campgrounds and vacation homes are most important in the Coastal Region – a reflection of the availability of outdoor recreation opportunities and scenic settings found in this region.
- The Western Region has the highest proportion of travel spending by those staying in the private home of a friend or relative – a function of the high population density of this region.
- More than six out of ten visitor dollars spent in King County are attributable to leisure and business travelers who stayed in commercial lodging such as hotels and motels – a reflection of the large volume of business and convention travel in King County.
- The Eastern Region of Washington is the most similar to the state as a whole in terms of the distribution of destination spending by type of accommodation.
- Spending by day travelers is roughly similar in all four regions of the state. This is a reflection of the urbanized areas that generate day travelers to the other regions (Seattle-Tacoma; Portland, OR; and Vancouver, B.C.) and the fact that King County is itself an area that attracts day travel.

Detailed travel impacts for the four regions from 1991 through 2002 follow. (Preliminary estimates for 2003 are not available at the regional and county levels due to data limitations.)

## Direct Coastal Region Travel Impacts 1991-2002

	1991	1997	1998	1999	2000	2001	2002
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>							
Hotel, Motel, B&B	192.0	219.3	241.2	251.2	262.9	274.4	285.6
Private Campground	53.4	71.3	75.0	75.7	83.6	83.8	82.1
Public Campground	28.2	34.3	35.0	34.1	37.3	38.5	40.7
Private Home	96.0	122.6	123.5	132.0	143.1	147.6	148.3
Vacation Home	50.1	58.1	58.2	60.8	63.2	65.4	66.2
Day Travel	88.7	109.6	114.9	118.6	126.6	130.4	133.9
Spending at Destination	508.5	615.2	647.7	672.5	716.8	740.0	756.8
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	91.6	108.7	120.6	123.1	126.7	130.7	133.8
Food & Beverage Services	142.8	169.2	182.8	186.2	194.1	201.8	212.6
Food Stores	39.8	50.4	54.4	54.7	57.5	59.9	61.9
Ground Tran. & Motor Fuel	46.1	55.2	57.5	62.3	78.3	77.9	74.6
Recreation, Entertainment	76.0	95.7	102.8	104.8	110.6	114.7	118.2
Shopping	112.2	136.0	129.5	141.5	149.5	155.0	155.7
Spending at Destination	508.5	615.2	647.7	672.5	716.8	740.0	756.8
<b>Total Direct Travel Spending (\$Million)</b>							
Visitor Spending at Destination	508.5	615.2	647.7	672.5	716.8	740.0	756.8
Air Transportation	2.9	2.6	3.0	2.0	2.1	1.7	1.6
Total Direct Spending	511.4	617.9	650.8	674.5	718.9	741.7	758.4
<b>Travel-Generated Earnings by Industry (\$Million)</b>							
Accommodation & Food Services	87.4	103.2	115.1	118.1	124.4	127.2	135.9
Arts, Entertainment & Recreation	36.3	45.6	49.0	49.9	52.7	54.7	56.3
Retail (incl. Motor Fuel)	21.4	26.3	25.8	28.1	31.0	31.8	31.5
Air Transportation	0.7	0.7	0.8	0.5	0.6	0.5	0.5
Travel Arrangement Services	2.5	3.4	3.5	3.5	2.9	2.4	2.1
Auto Rental & other ground tran.	0.5	1.1	1.2	1.2	1.3	1.3	1.2
Total Direct Earnings	148.8	180.3	195.4	201.4	212.9	217.9	227.5
<b>Travel-Generated Employment by Industry (Thousand Jobs)</b>							
Accommodations & Food Service	7.8	7.5	8.0	8.1	8.0	7.9	8.1
Arts, Entertainment & Recreation	4.0	3.9	4.1	3.9	4.0	4.5	4.5
Retail (incl. Motor Fuel)	1.7	1.7	1.6	1.7	1.8	1.8	1.7
Air Transportation	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Travel Arrangement Services	0.2	0.3	0.3	0.3	0.2	0.2	0.1
Auto Rental & other ground tran.	0.0	0.1	0.1	0.1	0.1	0.1	0.1
Total Direct Employment	13.8	13.4	14.1	14.0	14.1	14.4	14.5
<b>Tax Revenues Generated by Travel Spending (\$Million)</b>							
Local Taxes	6.7	9.2	10.1	11.4	11.9	12.3	12.9
State Taxes	32.8	39.1	41.8	42.8	45.2	46.3	48.3
Total Direct Taxes	39.5	48.3	51.9	54.2	57.1	58.7	61.2

Details may not add to totals due to rounding. *n.d.* denotes not disclosed.  
 Estimates for 1992 through 1996 available from Dean Runyan Associates. The Coastal counties are Clallam, Grays Harbor, Jefferson, Kitsap, Mason, Pacific, and Wahkiakum.

## Direct Western Region Travel Impacts 1991-2002

	1991	1997	1998	1999	2000	2001	2002
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>							
Hotel, Motel, B&B	452	616	652	697	801	798	797
Private Campground	84	99	97	105	112	119	114
Public Campground	39	46	44	45	47	51	51
Private Home	451	587	597	641	700	732	742
Vacation Home	69	82	83	87	92	96	98
Day Travel	501	649	668	710	772	804	817
Spending at Destination	1,596	2,079	2,141	2,284	2,524	2,599	2,620
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	187	258	277	291	323	322	320
Food & Beverage Services	472	610	644	673	722	751	782
Food Stores	112	150	158	165	175	185	189
Ground Tran. & Motor Fuel	245	294	306	331	417	415	397
Recreation, Entertainment	268	361	379	398	427	447	456
Shopping	312	407	377	426	460	479	475
Spending at Destination	1,596	2,079	2,141	2,284	2,524	2,599	2,620
<b>Total Direct Travel Spending (\$Million)</b>							
Visitor Spending at Destination	1,596	2,079	2,141	2,284	2,524	2,599	2,620
Air Transportation	42	49	47	43	68	42	40
Total Direct Spending	1,638	2,128	2,188	2,327	2,592	2,641	2,660
<b>Travel-Generated Earnings by Industry (\$Million)</b>							
Accommodation & Food Services	236	308	334	354	389	397	420
Arts, Entertainment & Recreation	114	153	160	168	181	189	192
Retail (incl. Motor Fuel)	64	82	80	89	100	103	101
Air Transportation	11	13	13	11	19	13	13
Travel Arrangement Services	18	36	39	34	42	34	29
Auto Rental & other ground tran.	3	5	6	6	6	6	6
Total Direct Earnings	445	596	632	663	736	742	760
<b>Travel-Generated Employment by Industry (Thousand Jobs)</b>							
Accommodations & Food Service	19.9	21.0	21.7	21.9	22.4	21.9	22.6
Arts, Entertainment & Recreation	13.3	13.7	13.7	13.7	14.3	15.5	14.6
Retail (incl. Motor Fuel)	4.7	4.9	4.7	5.0	5.3	5.3	5.0
Air Transportation	0.2	0.3	0.3	0.2	0.4	0.2	0.2
Travel Arrangement Services	1.2	1.9	2.0	1.7	1.7	1.4	1.1
Auto Rental & other ground tran.	0.2	0.3	0.3	0.3	0.3	0.3	0.3
Total Direct Employment	39.6	41.9	42.6	42.8	44.3	44.7	43.8
<b>Tax Revenues Generated by Travel Spending (\$Million)</b>							
Local Taxes	19	29	32	35	38	39	41
State Taxes	112	142	150	156	169	173	179
Total Direct Taxes	131	171	182	191	207	211	221

Details may not add to totals due to rounding. *n.d.* denotes not disclosed.

Estimates for 1992 through 1996 available from Dean Runyan Associates.

The Western counties are Clark, Cowlitz, Island, Lewis, Pierce, San Juan, Skagit, Skamania, Snohomish, Thurston, and Whatcom.

## Direct King County Travel Impacts 1991-2002

	1991	1997	1998	1999	2000	2001	2002
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>							
Hotel, Motel, B&B	1,164	1,795	1,909	2,114	2,290	2,284	2,223
Private Campground	13	20	21	19	20	21	20
Public Campground	2	3	4	4	4	4	4
Private Home	438	565	573	597	639	656	662
Vacation Home	12	18	19	21	23	24	25
Day Travel	391	546	571	612	658	671	677
Spending at Destination	2,021	2,947	3,096	3,367	3,633	3,661	3,611
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	399	620	672	740	780	761	710
Food & Beverage Services	547	762	816	879	933	953	982
Food Stores	104	150	161	172	181	187	190
Ground Tran. & Motor Fuel	320	489	524	542	633	630	603
Recreation, Entertainment	276	396	421	453	483	494	500
Shopping	374	530	502	582	623	636	625
Spending at Destination	2,021	2,947	3,096	3,367	3,633	3,661	3,611
<b>Total Direct Travel Spending (\$Million)</b>							
Visitor Spending at Destination	2,021	2,947	3,096	3,367	3,633	3,661	3,611
Air Transportation	1,752	1,891	1,905	2,034	2,157	1,980	1,904
Total Direct Spending	3,773	4,838	5,001	5,401	5,791	5,641	5,515
<b>Travel-Generated Earnings by Industry (\$Million)</b>							
Accommodation & Food Services	338	488	535	586	630	622	632
Arts, Entertainment & Recreation	156	222	237	254	271	277	281
Retail (incl. Motor Fuel)	65	90	87	100	112	113	109
Air Transportation	445	485	517	546	597	626	610
Travel Arrangement Services	83	135	141	162	208	247	212
Auto Rental & other ground tran.	19	37	41	40	44	43	42
Total Direct Earnings	1,105	1,457	1,558	1,689	1,861	1,929	1,886
<b>Travel-Generated Employment by Industry (Thousand Jobs)</b>							
Accommodations & Food Service	19.3	22.4	21.7	22.7	22.6	24.0	23.6
Arts, Entertainment & Recreation	7.4	8.2	8.6	9.5	8.9	8.7	9.3
Retail (incl. Motor Fuel)	3.6	4.1	3.8	4.0	4.1	4.4	4.1
Air Transportation	10.2	10.3	10.5	11.3	11.5	11.8	11.0
Travel Arrangement Services	3.8	5.1	5.1	5.3	5.4	5.0	4.0
Auto Rental & other ground tran.	1.2	1.9	2.0	1.8	1.8	1.8	1.7
Total Direct Employment	45.6	52.0	51.6	54.5	54.3	55.8	53.7
<b>Tax Revenues Generated by Travel Spending (\$Million)</b>							
Local Taxes	50	95	106	116	131	129	124
State Taxes	133	199	212	226	234	236	238
Total Direct Taxes	183	294	318	341	366	365	362

Details may not add to totals due to rounding. *n.d.* denotes not disclosed.  
Estimates for 1992 through 1996 available from Dean Runyan Associates.

## Direct Eastern Region Travel Impacts 1991-2002

	1991	1997	1998	1999	2000	2001	2002
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>							
Hotel, Motel, B&B	458	593	617	657	718	737	747
Private Campground	108	96	92	105	115	106	108
Public Campground	45	47	46	49	56	55	54
Private Home	233	302	307	328	359	371	372
Vacation Home	52	61	62	65	69	71	72
Day Travel	280	340	349	372	402	409	417
Spending at Destination	1,175	1,438	1,474	1,576	1,718	1,749	1,771
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	189	241	255	269	291	300	305
Food & Beverage Services	317	380	398	418	440	450	471
Food Stores	81	97	101	107	112	115	118
Ground Tran. & Motor Fuel	178	224	235	252	312	311	297
Recreation, Entertainment	176	218	228	240	255	260	267
Shopping	233	277	255	290	308	314	313
Spending at Destination	1,175	1,438	1,474	1,576	1,718	1,749	1,771
<b>Total Direct Travel Spending (\$Million)</b>							
Visitor Spending at Destination	1,175	1,438	1,474	1,576	1,718	1,749	1,771
Air Transportation	120	88	90	90	114	62	59
Total Direct Spending	1,295	1,527	1,563	1,666	1,832	1,810	1,830
<b>Travel-Generated Earnings by Industry (\$Million)</b>							
Accommodation & Food Services	192	233	250	265	287	289	307
Arts, Entertainment & Recreation	88	110	115	121	129	131	134
Retail (incl. Motor Fuel)	49	58	56	63	69	70	69
Air Transportation	31	23	24	24	31	20	19
Travel Arrangement Services	14	19	18	18	19	20	17
Auto Rental & other ground tran.	3	6	6	6	6	6	6
Total Direct Earnings	376	448	470	497	542	536	552
<b>Travel-Generated Employment by Industry (Thousand Jobs)</b>							
Accommodations & Food Service	16.4	16.1	16.9	16.8	17.0	16.4	16.7
Arts, Entertainment & Recreation	9.4	9.0	9.3	9.1	8.6	8.6	8.5
Retail (incl. Motor Fuel)	3.8	3.6	3.4	3.7	4.0	3.9	3.6
Air Transportation	0.6	0.5	0.5	0.5	0.6	0.4	0.3
Travel Arrangement Services	0.9	0.9	0.8	0.8	0.7	0.7	0.6
Auto Rental & other ground tran.	0.2	0.3	0.3	0.3	0.3	0.3	0.2
Total Direct Employment	31.2	30.4	31.3	31.1	31.2	30.2	30.0
<b>Tax Revenues Generated by Travel Spending (\$Million)</b>							
Local Taxes	15	22	23	25	27	28	29
State Taxes	81	99	104	109	116	117	122
Total Direct Taxes	96	121	128	134	144	145	151

Details may not add to totals due to rounding. *n.d.* denotes not disclosed.

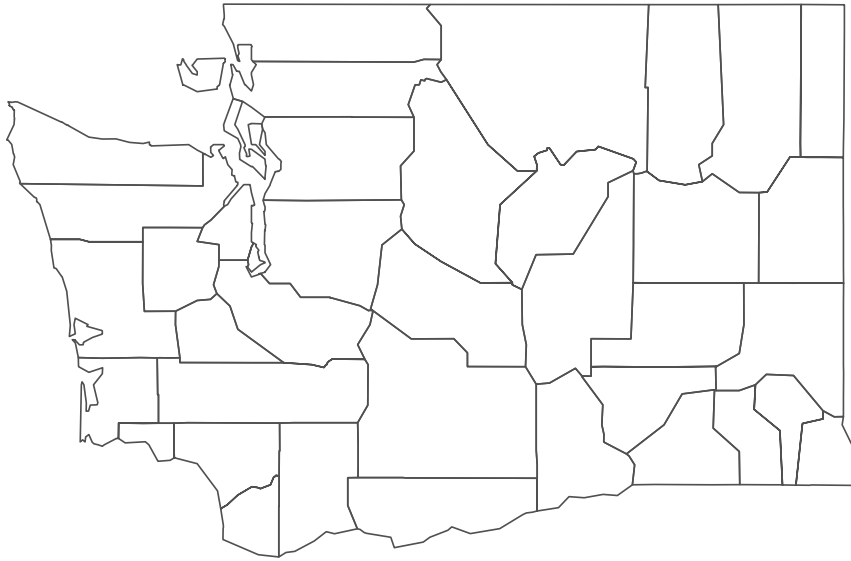
Estimates for 1992 through 1996 available from Dean Runyan Associates. The Eastern counties are Adams, Asotin, Benton, Chelan, Douglas, Ferry, Franklin, Garfield, Grant, Lincoln, Kittitas, Okanogan, Pend Oreille, Spokane, Stevens, Walla Walla, Whitman, and Yakima.

## Washington State Regions Direct Travel Impacts, 2002

	Coastal	Western	King Co.	Eastern	State Total
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>					
Hotel, Motel, B&B	286	797	2,223	747	4,053
Private Campground	82	114	20	108	325
Public Campground	41	51	4	54	150
Private Home	148	742	662	372	1,924
Vacation Home	66	98	25	72	261
Day Travel	134	817	677	417	2,045
Spending at Destination	757	2,620	3,611	1,771	8,758
<b>Visitor Spending by Commodity Purchased (\$Million)</b>					
Accommodations	134	320	710	305	1,469
Food & Beverage Services	213	782	982	471	2,447
Food Stores	62	189	190	118	560
Ground Tran. & Motor Fuel	75	397	603	297	1,372
Recreation, Entertainment	118	456	500	267	1,340
Shopping	156	475	625	313	1,569
Spending at Destination	757	2,620	3,611	1,771	8,758
<b>Total Direct Travel Spending (\$Million)</b>					
Visitor Spending at Destination	757	2,620	3,611	1,771	8,758
Air Transportation	2	40	1,904	59	2,005
Total Direct Spending	758	2,660	5,515	1,830	10,763
<b>Travel-Generated Earnings by Industry (\$Million)</b>					
Accommodation & Food Services	136	420	632	307	1,495
Arts, Entertainment & Recreation	56	192	281	134	663
Retail (incl. Motor Fuel)	31	101	109	69	310
Air Transportation	1	13	610	19	643
Travel Arrangement Services	2	29	212	17	260
Auto Rental & other ground tran.	1	6	42	6	55
Total Direct Earnings	228	760	1,886	552	3,426
<b>Travel-Generated Employment by Industry (Thousand Jobs)</b>					
Accommodations & Food Service	8.1	22.6	23.6	16.7	71.1
Arts, Entertainment & Recreation	4.5	14.6	9.3	8.5	36.9
Retail (incl. Motor Fuel)	1.7	5.0	4.1	3.6	14.4
Air Transportation	0.0	0.2	11.0	0.3	11.6
Travel Arrangement Services	0.1	1.1	4.0	0.6	5.9
Auto Rental & other ground tran.	0.1	0.3	1.7	0.2	2.2
Total Direct Employment	14.5	43.8	53.7	30.0	142.0
<b>Tax Revenues Generated by Travel Spending (\$Million)</b>					
Local Taxes	13	41	124	29	208
State Taxes	48	179	238	122	587
Total Direct Taxes	61	221	362	151	795

Details may not add to totals due to rounding. *n.d.* denotes not disclosed.

#### IV. THE COUNTIES



The analysis of travel impacts at the county level provides a valuable overview of how the economic benefits of travel and tourism are distributed throughout Washington state.

Urban areas, such as King, Spokane and Pierce counties, tend to have highly developed travel industry infrastructure consisting of large inventories of amusement/recreation opportunities, commercial accommodations facilities, and well-developed transportation centers. Hotel/motel guests are important to these areas and, hence, a large proportion of travel expenditures are spent on overnight lodging.

Rural areas, on the other hand, tend to offer scenic and outdoor recreational opportunities. Campers and vacation home users are important to the local economies in these areas, and visitors tend to spend the greatest portion of their travel dollars on food and beverages and ground transportation, particularly motor fuel.

Other types of travelers are notable for other areas. Day visitors are significant in cities and counties close to recreation areas, wilderness areas, lakes, and beaches. The importance of day visitors to these areas also increases with the proximity to major population centers, such as the Puget Sound area in Washington, the Portland metropolitan area in Oregon, and Vancouver and Victoria in British Columbia. Coastal communities such as those on the North Olympic Peninsula are prime examples of areas where day visitors account for a large share of total traveler spending.

Shopping destination areas also receive a higher proportion of day visitation and visitors tend to spend a higher proportion of their total spending on retail expenditures. This is seen in both Bellingham/Whatcom County and in Spokane County and relates particularly to Canadian visitation.

#### **TRAVEL GENERATED EMPLOYMENT**

Although travel impacts are largest in absolute terms in Washington's more populated areas, the significance of the visitor industry to local economies can be very substantial in some of the state's rural areas. A useful measure of the relative significance of the visitor industry in each region is the number of travel-generated jobs in relation to the total employment of the county. (See the table on page 11.) A high percentage of travel-generated employment indicates a relatively high reliance on income from the visitor industry. In general, the most highly tourism-dependent counties in Washington are rural. The counties with more than ten percent travel generated employment in 2001 were Grays Harbor, Jefferson, Pacific, Pend Oreille, San Juan, and Skamania.

*(Note: The travel generated employment estimates are for jobs directly generated by travel. These estimates are for 2001, the most recent year for which total employment estimates are available from the Bureau of Economic Analysis, U.S. Department of Commerce.)*

## Washington State Direct Travel Impacts by County, 2002

	Travel			Tax Receipts		
	Spending (\$Million)	Earnings (\$Million)	Employment (jobs)	Local (\$000)	State (\$000)	Total (\$000)
Adams	16.6	3.3	250	185	1,333	1,518
Asotin	21.7	6.3	380	231	1,348	1,580
Benton	168.2	46.0	2,610	3,143	11,749	14,892
Chelan	230.1	73.2	4,400	4,982	13,664	18,645
Clallam	133.0	39.2	2,700	2,287	8,248	10,534
Clark	265.6	78.5	3,960	3,034	19,182	22,216
Columbia	5.6	1.4	110	55	375	431
Cowlitz	97.1	25.9	1,630	1,200	6,455	7,655
Douglas	23.7	5.3	280	270	1,908	2,177
Ferry	14.2	3.6	310	158	869	1,028
Franklin	79.1	17.8	1,050	1,484	6,039	7,523
Garfield	1.5	0.6	30	13	88	101
Grant	130.6	36.9	2,220	1,822	8,980	10,801
Grays Harbor	194.6	63.8	3,900	3,635	12,399	16,034
Island	108.4	38.2	2,600	1,694	6,506	8,200
Jefferson	80.4	22.8	1,550	1,486	4,736	6,222
King	5,514.9	1,886.0	53,690	124,378	237,774	362,151
Kitsap	185.0	51.4	3,070	2,807	12,897	15,705
Kittitas	75.8	21.0	1,390	931	5,589	6,521
Klickitat	24.0	6.4	430	176	1,615	1,791
Lewis	132.4	34.2	2,150	1,533	9,493	11,026
Lincoln	12.8	4.0	220	100	964	1,064
Mason	68.2	24.1	1,360	1,101	4,327	5,428
Okanogan	93.4	28.2	1,570	1,437	6,176	7,613
Pacific	94.5	25.4	1,890	1,579	5,544	7,123
Pend Oreille	21.5	6.1	410	205	1,306	1,510
Pierce	624.6	177.0	10,180	13,509	41,565	55,074
San Juan	110.8	37.4	1,910	1,696	6,555	8,250
Skagit	171.4	47.9	2,770	2,074	11,991	14,064
Skamania	42.1	11.4	650	475	2,431	2,906
Snohomish	579.2	158.4	8,480	9,213	40,346	49,559
Spokane	547.5	190.3	8,220	8,656	35,566	44,223
Stevens	43.8	14.1	1,050	469	2,870	3,339
Thurston	188.5	52.6	2,680	2,842	13,084	15,925
Wahkiakum	2.7	0.8	60	25	169	194
Walla Walla	53.4	15.5	910	828	3,390	4,218
Whatcom	339.6	99.0	6,790	4,191	21,585	25,776
Whitman	37.3	11.2	830	447	2,377	2,825
Yakima	229.6	60.8	3,350	3,586	15,987	19,573
State Total	10,763	3,426	142,030	207,900	587,500	795,400

**Washington State**  
**Direct Travel Spending by County, 1991-1997**  
**Air transportation included**  
(\$Millions)

	<b>1991</b>	<b>1992</b>	<b>1993</b>	<b>1994</b>	<b>1995</b>	<b>1996</b>	<b>1997</b>
Adams	12.3	12.9	13.2	13.6	13.0	13.6	13.9
Asotin	13.5	14.1	14.3	16.3	16.8	16.8	17.3
Benton	85.9	93.0	101.3	123.7	117.9	118.8	127.1
Chelan	136.7	140.0	143.8	137.5	161.0	162.1	176.8
Clallam	92.4	100.2	102.4	100.6	106.2	110.2	115.4
Clark	143.4	149.9	156.0	163.9	175.5	187.8	200.0
Columbia	3.3	3.4	3.6	4.6	5.0	4.5	4.9
Cowlitz	70.6	70.5	71.9	72.8	78.1	80.5	86.5
Douglas	17.4	18.5	18.0	18.1	19.2	19.8	21.0
Ferry	11.2	11.6	11.4	11.1	12.0	11.8	11.7
Franklin	61.6	64.0	67.4	69.9	75.8	70.4	71.4
Garfield	1.1	1.2	1.2	1.2	1.3	1.3	1.3
Grant	122.2	122.3	123.8	117.8	133.2	99.7	106.6
Grays Harbor	122.5	129.1	130.9	132.0	141.3	148.3	153.4
Island	87.5	91.3	94.5	94.5	96.3	98.9	105.7
Jefferson	55.9	56.8	61.8	59.8	63.6	69.2	67.2
King	3,772.9	3,833.4	3,853.6	3,937.9	4,133.7	4,475.5	4,838.0
Kitsap	125.1	127.7	125.6	128.0	133.3	138.6	142.6
Kittitas	51.9	54.7	55.8	57.5	59.1	63.6	63.9
Klickitat	16.3	16.7	17.4	16.7	18.3	18.0	18.7
Lewis	86.9	89.9	88.5	86.9	91.6	92.9	99.3
Lincoln	9.9	10.1	10.1	10.2	9.4	9.5	10.0
Mason	51.7	53.0	54.7	54.3	56.3	57.7	59.8
Okanogan	62.5	65.0	66.9	63.6	70.4	71.3	78.3
Pacific	62.2	66.2	66.9	67.7	71.2	73.3	77.4
Pend Oreille	15.7	16.1	15.8	15.9	18.2	18.7	18.6
Pierce	393.2	408.9	421.1	430.6	450.3	469.8	499.2
San Juan	50.3	57.9	63.0	65.0	75.3	83.0	81.6
Skagit	116.1	118.7	116.2	120.0	123.3	126.2	138.4
Skamania	13.6	14.4	34.4	39.0	32.9	33.8	35.7
Snohomish	343.0	358.3	371.9	377.0	405.2	428.8	471.4
Spokane	406.0	420.3	425.2	434.6	446.4	478.3	485.1
Stevens	33.9	34.8	34.3	35.5	36.0	37.0	37.1
Thurston	103.4	110.3	114.8	123.3	127.9	140.7	143.4
Wahkiakum	1.5	1.6	1.6	1.6	2.0	2.0	2.1
Walla Walla	36.8	38.7	37.9	40.5	43.7	41.9	43.6
Whatcom	229.6	240.3	235.7	235.4	240.1	253.3	267.2
Whitman	24.0	23.1	24.4	25.5	29.9	29.7	29.4
Yakima	173.3	162.2	180.6	185.4	189.8	193.7	190.0
<b>State Total</b>	<b>7,217.4</b>	<b>7,401.3</b>	<b>7,531.8</b>	<b>7,689.4</b>	<b>8,080.2</b>	<b>8,551.0</b>	<b>9,111.0</b>

**Washington State**  
**Direct Travel Spending by County, 1998-2002**

Air transportation included

(\$Millions)

	1998	1999	2000	2001	2002	*Annual Change
Adams	14.3	15.0	16.9	17.2	16.6	2.8%
Asotin	17.4	19.5	21.1	21.4	21.7	4.4%
Benton	130.1	138.2	152.9	161.6	168.2	6.3%
Chelan	184.8	206.8	219.4	223.7	230.1	4.9%
Clallam	121.1	121.6	126.8	132.0	133.0	3.4%
Clark	221.0	229.9	251.6	261.4	265.6	5.8%
Columbia	4.7	5.2	5.4	5.6	5.6	5.0%
Cowlitz	86.1	91.3	93.9	99.3	97.1	2.9%
Douglas	20.0	21.7	24.0	24.7	23.7	2.9%
Ferry	11.1	12.4	14.0	13.9	14.2	2.2%
Franklin	73.2	72.5	80.7	80.5	79.1	2.3%
Garfield	1.3	1.4	1.5	1.5	1.5	2.7%
Grant	109.5	115.7	133.6	126.8	130.6	0.6%
Grays Harbor	167.7	174.2	186.6	192.7	194.6	4.3%
Island	108.3	97.6	103.6	112.3	108.4	2.0%
Jefferson	70.9	73.2	77.3	77.3	80.4	3.4%
King	5,000.8	5,401.1	5,790.7	5,641.3	5,514.9	3.5%
Kitsap	149.2	157.9	169.0	176.3	185.0	3.6%
Kittitas	61.4	70.4	73.5	75.2	75.8	3.5%
Klickitat	19.0	21.1	21.7	23.6	24.0	3.6%
Lewis	103.5	110.3	121.6	128.6	132.4	3.9%
Lincoln	10.1	11.1	12.5	12.8	12.8	2.3%
Mason	59.4	62.6	65.7	67.8	68.2	2.6%
Okanogan	82.0	90.3	97.6	98.7	93.4	3.7%
Pacific	80.3	82.6	91.0	93.1	94.5	3.9%
Pend Oreille	18.3	20.7	22.0	21.1	21.5	2.9%
Pierce	506.3	555.6	626.4	612.4	624.6	4.3%
San Juan	90.9	93.7	104.2	115.9	110.8	7.4%
Skagit	143.5	163.9	178.0	173.0	171.4	3.6%
Skamania	34.7	37.9	43.3	41.5	42.1	10.8%
Snohomish	478.0	508.3	570.2	577.2	579.2	4.9%
Spokane	501.1	522.1	583.2	542.7	547.5	2.8%
Stevens	36.5	40.4	42.9	42.7	43.8	2.4%
Thurston	147.7	158.0	174.8	185.0	188.5	5.6%
Wahkiakum	2.1	2.3	2.5	2.5	2.7	5.3%
Walla Walla	43.0	44.8	50.2	52.9	53.4	3.5%
Whatcom	268.3	280.7	324.4	334.1	339.6	3.6%
Whitman	35.0	31.9	37.7	37.0	37.3	4.1%
Yakima	190.7	204.6	221.3	226.7	229.6	2.6%
State Total	9,403	10,069	10,934	10,834	10,763	3.7%

\*Annual Change is the average annual percentage change from 1991-2002.

## Washington State Direct Travel Spending at County of Destination, 1991-1997

Air transportation not included

(\$Millions)

	1991	1992	1993	1994	1995	1996	1997
Adams	12.3	12.9	13.2	13.6	13.0	13.6	13.9
Asotin	13.5	14.1	14.3	16.3	16.8	16.8	17.3
Benton	85.9	93.0	101.3	123.7	117.9	118.8	127.1
Chelan	134.8	138.2	142.0	135.8	159.5	160.1	174.5
Clallam	89.5	97.3	99.5	97.8	103.6	107.1	112.7
Clark	143.4	149.9	156.0	163.9	175.5	187.8	200.0
Columbia	3.3	3.4	3.6	4.6	5.0	4.5	4.9
Cowlitz	70.6	70.5	71.9	72.8	78.1	80.5	86.5
Douglas	17.4	18.5	18.0	18.1	19.2	19.8	21.0
Ferry	11.2	11.6	11.4	11.1	12.0	11.8	11.7
Franklin	49.8	52.2	55.9	58.7	61.4	61.9	63.4
Garfield	1.1	1.2	1.2	1.2	1.3	1.3	1.3
Grant	101.4	101.6	103.6	98.1	95.1	98.0	101.1
Grays Harbor	122.5	129.1	130.9	132.0	141.3	148.3	153.4
Island	75.6	79.4	82.9	83.2	84.4	87.8	91.4
Jefferson	55.9	56.8	61.8	59.8	63.6	69.2	67.2
King	2,021.0	2,085.7	2,154.6	2,280.7	2,479.6	2,725.5	2,946.8
Kitsap	125.1	127.7	125.6	128.0	133.3	138.6	142.6
Kittitas	51.9	54.7	55.8	57.5	59.1	63.6	63.9
Klickitat	16.3	16.7	17.4	16.7	18.3	18.0	18.7
Lewis	86.9	89.9	88.5	86.9	91.6	92.9	99.3
Lincoln	9.9	10.1	10.1	10.2	9.4	9.5	10.0
Mason	51.7	53.0	54.7	54.3	56.3	57.7	59.8
Okanogan	62.5	65.0	66.9	63.6	70.4	71.3	78.3
Pacific	62.2	66.2	66.9	67.7	71.2	73.3	77.4
Pend Oreille	15.7	16.1	15.8	15.9	18.2	18.7	18.6
Pierce	388.0	403.7	416.0	425.7	444.4	465.6	495.7
San Juan	50.3	57.9	63.0	65.0	75.3	83.0	81.6
Skagit	113.1	115.7	113.3	117.2	120.3	123.2	135.2
Skamania	13.6	14.4	34.4	39.0	32.9	33.8	35.7
Snohomish	331.5	346.9	360.8	366.1	391.6	420.2	453.8
Spokane	341.9	356.4	363.0	373.9	387.9	412.2	423.6
Stevens	33.9	34.8	34.3	35.5	36.0	37.0	37.1
Thurston	103.3	110.3	114.7	123.2	127.9	140.5	143.0
Wahkiakum	1.5	1.6	1.6	1.6	2.0	2.0	2.1
Walla Walla	30.7	32.6	32.0	34.7	36.8	37.1	37.9
Whatcom	219.4	230.2	225.8	225.8	231.0	242.6	257.4
Whitman	20.5	19.6	21.0	22.2	25.8	26.9	26.6
Yakima	161.2	150.2	168.9	174.0	177.0	183.2	187.5
State Total	5,300	5,489	5,673	5,876	6,244	6,663	7,080

## Washington State Direct Travel Spending at County of Destination, 1998-2002

Air transportation not included

(\$Millions)

	1998	1999	2000	2001	2002	*Annual Change
Adams	14.3	15.0	16.9	17.2	16.6	2.8%
Asotin	17.4	19.5	21.1	21.4	21.7	4.4%
Benton	130.1	138.2	152.9	161.6	168.2	6.3%
Chelan	182.5	204.4	216.5	221.1	227.6	4.9%
Clallam	118.1	119.6	124.6	130.3	131.4	3.6%
Clark	221.0	229.9	251.6	261.4	265.6	5.8%
Columbia	4.7	5.2	5.4	5.6	5.6	5.0%
Cowlitz	86.1	91.3	93.9	99.3	97.1	2.9%
Douglas	20.0	21.7	24.0	24.7	23.7	2.9%
Ferry	11.1	12.4	14.0	13.9	14.2	2.2%
Franklin	64.9	65.7	70.3	73.4	72.3	3.5%
Garfield	1.3	1.4	1.5	1.5	1.5	2.7%
Grant	104.4	110.7	128.9	124.6	128.6	2.2%
Grays Harbor	167.7	174.2	186.6	192.7	194.6	4.3%
Island	90.7	97.6	103.6	112.3	108.4	3.3%
Jefferson	70.9	73.2	77.3	77.3	80.4	3.4%
King	3,096.0	3,367.2	3,633.3	3,660.8	3,610.6	5.4%
Kitsap	149.2	157.9	169.0	176.3	185.0	3.6%
Kittitas	61.4	70.4	73.5	75.2	75.8	3.5%
Klickitat	19.0	21.1	21.7	23.6	24.0	3.6%
Lewis	103.5	110.3	121.6	128.6	132.4	3.9%
Lincoln	10.1	11.1	12.5	12.8	12.8	2.3%
Mason	59.4	62.6	65.7	67.8	68.2	2.6%
Okanogan	82.0	90.3	97.6	98.7	93.4	3.7%
Pacific	80.3	82.6	91.0	93.1	94.5	3.9%
Pend Oreille	18.3	20.7	22.0	21.1	21.5	2.9%
Pierce	504.8	537.2	602.9	604.5	617.0	4.3%
San Juan	90.9	93.7	104.2	115.9	110.8	7.4%
Skagit	138.6	153.4	167.6	166.4	165.1	3.5%
Skamania	34.7	37.9	43.3	41.5	42.1	10.8%
Snohomish	464.2	499.7	560.9	571.4	573.7	5.1%
Spokane	437.2	456.0	498.7	499.4	505.9	3.6%
Stevens	36.5	40.4	42.9	42.7	43.8	2.4%
Thurston	147.0	156.7	174.0	185.0	188.5	5.6%
Wahkiakum	2.1	2.3	2.5	2.5	2.7	5.3%
Walla Walla	38.1	40.6	45.0	50.8	51.4	4.8%
Whatcom	259.3	276.5	300.8	312.7	319.0	3.5%
Whitman	32.2	29.6	35.3	35.2	35.5	5.1%
Yakima	188.1	201.6	217.9	224.1	227.0	3.2%
State Total	7,358	7,900	8,593	8,749	8,758	4.7%

\*Annual Change is the average annual percentage change from 1991-2002.

**Washington State Counties  
Direct Travel-Generated Employment  
as a Percentage of Total Employment  
2001**

County	*Total Employment	Travel-Generated Employment	Percent
Adams	9,280	250	2.7%
Asotin	7,900	380	4.8%
Benton	81,100	2,530	3.1%
Chelan	47,600	4,280	9.0%
Clallam	32,570	2,770	8.5%
Clark	161,150	3,920	2.4%
Columbia	2,290	110	4.8%
Cowlitz	47,710	1,660	3.5%
Douglas	11,200	290	2.6%
Ferry	2,770	270	9.7%
Franklin	26,580	1,020	3.8%
Garfield	1,430	30	2.1%
Grant	39,650	2,060	5.2%
Grays Harbor	31,840	3,870	12.2%
Island	34,770	2,720	7.8%
Jefferson	13,500	1,450	10.7%
King	1,429,300	55,760	3.9%
Kitsap	115,240	2,880	2.5%
Kittitas	17,420	1,560	9.0%
Klickitat	9,360	460	4.9%
Lewis	34,030	2,470	7.3%
Lincoln	5,370	300	5.6%
Mason	17,920	1,410	7.9%
Okanogan	22,280	2,010	9.0%
Pacific	9,490	1,930	20.3%
Pend Oreille	4,040	430	10.6%
Pierce	335,840	10,610	3.2%
San Juan	9,910	1,940	19.6%
Skagit	60,340	2,810	4.7%
Skamania	2,730	690	25.3%
Snohomish	280,470	8,740	3.1%
Spokane	252,060	7,950	3.2%
Stevens	15,760	1,040	6.6%
Thurston	112,930	2,690	2.4%
Wahkiakum	1,600	50	3.1%
Walla Walla	32,330	900	2.8%
Whatcom	94,810	6,440	6.8%
Whitman	21,670	850	3.9%
Yakima	116,450	3,470	3.0%
State Total	3,552,670	145,020	4.1%

\*All full-time and part-time payroll employees and proprietors, as reported by the Bureau of Economic Analysis for 2001.

## V. VISITOR VOLUME

The number of visitors to a state provides a very useful measure of the success of the state as a visitor attraction. Visitor volume figures for Washington are estimated from the economic findings of this report and rely on visitor profile data collected for Washington State Business and Tourism Development by Longwoods International in 1999, and by Dean Runyan Associates in 1995 and 1996. The methodology used to derive these estimates can be found in Appendix A.

Statewide estimates of average daily spending by type of accommodation for 2003 for travel parties and individuals, and the estimates of visitor volume based on these expenditures are shown below.

### Average Daily Spending in Washington State, 2003p

Destination	Ave. Daily Spending (Million)	Ave. Daily Spending (per party)	Average Party Size (persons)	Ave. Daily Spending (per person)
Hotel, Motel, B&B	\$4,370	\$287	2.5	\$115
Commercial Camp	\$340	\$119	3	\$40
Public Camp	\$156	\$117	3.1	\$38
Private Home	\$1,947	\$96	2.5	\$38
Vacation Home	\$274	\$235	3.1	\$76
Day Travel	\$2,054	\$158	3.2	\$49
Total	\$9,142	\$169	2.7	\$62

Source: Dean Runyan Associates and Longwoods International. Average daily spending does not include airfares.

### Visitor Volume in Washington State, 2003p (persons)

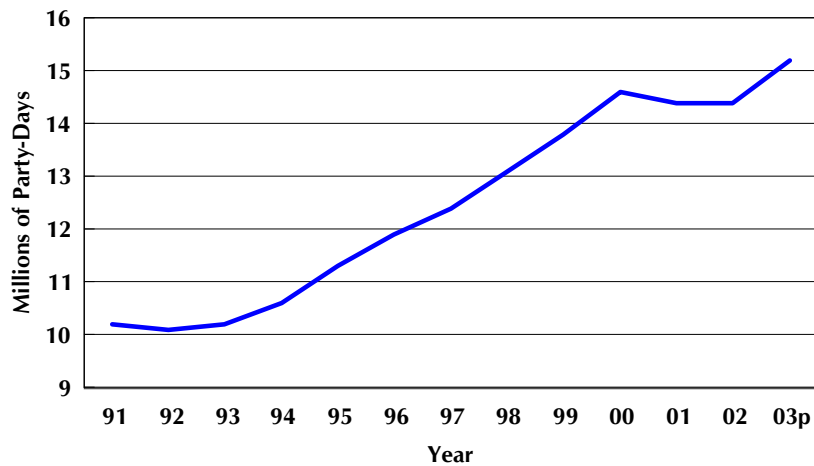
	Visitor Days (millions)	Average Stay (days)	Visits or Trips (millions)	Average # Repeat Visits	Visitors (millions)
Hotel, Motel, B&B	38.1	3.5	10.9	3.7	2.9
Commercial Camp	8.6	5.0	1.7	6.4	0.3
Public Camp	4.2	4.0	1.0	6.4	0.2
Private Home	50.9	4.7	10.8	4.3	2.5
Vacation Home	3.6	6.0	0.6	7.9	0.1
Day Travel	41.6	1.0	41.6	9.0	4.6
Total	146.9	2.2	66.6	6.3	10.6

Source: Dean Runyan Associates and Longwoods International.

It should be noted that visitor volume estimates (e.g., the number of trips or visits to Washington state and the number of visitors) are extremely sensitive to survey estimates of the average length of stay and the average number of repeat visits. The number of repeat visits used in Table 5-2 is derived from a survey of visitors to Washington state in 1995 and 1996 conducted by Dean Runyan Associates for the Department of Community, Trade and Economic Development (see WASHINGTON STATE VISITOR PROFILE, March 1997).

Figure 5-1 indicates the number of party-days of visitors that stayed overnight in commercial accommodations in Washington from 1991 through 2003. This measure is useful because it is not influenced by estimates of party size or length of stay. The sharp increase in the number of days for the 2003 calendar year is a reflection of both higher room sales and depressed room rates (compared to 2001).

**Hotel/Motel Visitors in Washington State  
1991-2003p**  
(party-days)



## **APPENDICES**

*APPENDIX A. REGIONAL TRAVEL IMPACT MODEL (RTIM) METHODOLOGY*

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## REGIONAL TRAVEL IMPACT MODEL (RTIM) METHODOLOGY

### TRAVEL IMPACT ESTIMATION PROCEDURES

#### TRAVEL SPENDING

**Hotel, Motel, B&B.** Spending on commercial accommodations by hotel and motel guests is estimated from Transient Lodging Tax (TLT) collections at the city/county jurisdictional level. Spending by hotel and motel guests in other business categories, such as food and transportation, is estimated using spending distributions reported in the visitor survey data. The spending distribution shows how travelers divide their spending between lodging and other purchases.

**Private Campground.** Spending by campers using commercial campgrounds is estimated from the number of commercial campsites, the average occupancy of these campsites (derived from state sources), and the average daily expenditures of visitor camp parties reported in survey data. Spending in other business categories is estimated in the same way as for hotel guests.

**Public Campground.** Spending by campers using public campgrounds is estimated from visitor counts at national and state parks, national forests, and state and federally managed recreation areas, and then multiplying the visitation by daily spending estimates from the visitor survey.

**Private Home.** Spending by private home guests is determined from visitor survey data estimating the number of visitors staying as guests of friends and relatives, and applying these rates to the household population base in individual counties.

**Vacation Home.** Estimated spending by vacation home renters and owners is based on a ratio derived between the number of visitors staying in commercial accommodations and those staying in vacation homes and the relative expenditure levels for each type of visitor. The state total is then distributed among the counties using housing data from the U.S. Bureau of the Census.

**Day Travel.** The share of day visits as a percentage of total travel is estimated from visitor survey data and applied to average daily spending estimates to produce day visitor spending.

*Note: Longwoods International provided all visitor survey data referenced in this study under separate contract to Washington State Department of Community, Trade and Economic Development, Tourism Unit.*

**Air Transportation.** A payroll-to-receipts ratio for the airline industry is estimated from Air Transport Association (ATA) and U.S. Department of Labor data. This ratio is applied to air transportation payroll data supplied by the Washington State Employment Security Department to obtain air transportation revenue. Additional data from ATA is used to estimate U.S. passenger revenue as a share of total U.S. commercial airline operating revenue and applied to the Washington air transportation receipts to estimate air passenger receipts only. Impacts of air cargo operations are excluded.

**Travel Arrangement.** This category consists of travel agents' commissions and fees paid to tour operators. A payroll-to-receipts ratio is estimated from the *Census of Transportation*. Receipts are estimated using this ratio and payroll data from the Washington State Employment Security Department. Data supplied by the Reed Publishing Group from the *Louis Harris Travel Agency Survey* provided a breakout of travel agent receipts by type of sale (i.e., airline, hotel, rental car, cruise, other). However, these sales are included in other travel-related business categories (e.g., airline ticket sales are included in air transportation) and are not broken out separately here.

#### **RELATED TRAVEL IMPACTS**

Spending by travelers generates jobs, payroll, and state and local tax revenue.

**Total Earnings** generated directly from traveler expenditures are estimated from the payroll-to-receipts ratio obtained from the 1997 Economic Census for the State of Washington, and earnings estimates from the Bureau of Economic Analysis.

**Employment** in each business category is calculated from wage data supplied by the Washington State Employment Security Department and earnings estimates from the Bureau of Economic Analysis.

**Local Taxes** consist of local room taxes or transient lodging taxes, and local sales and use taxes applicable to traveler purchases in eating and drinking establishments, in retail stores, and on automobile rentals.

**State Taxes** consist of state sales taxes applied to traveler spending on accommodations, retail shopping, restaurant meals, entertainment, and automobile rentals, plus the state fuel tax levied on motor fuel purchases.

Business and Occupation taxes (B&O) are also included in the state tax estimates where applicable. B&O tax revenues are estimated by applying the applicable tax rate to the business receipts or sales generated from traveler spending. Personal income tax is not applicable in Washington state and, hence, is not included in the state tax revenue attributable to traveler spending.

**Transient Lodging Taxes.** The Washington State Department of Revenue reports tax distributions within two months of the time they are collected. Therefore, towards the end of the current year, approximately three-quarters of the yearly data is available covering the taxes collected on the sale or rental of hotel/motel rooms in Washington state. These tax distributions are compared to those collected during the same time period in previous years and estimates of full-year tax collections are made.

**Campground Use Statistics.** Public camp use data was updated with the most current data supplied by the National Parks Service and the Washington State Parks and Recreation Commission. This data details the attendance or campsite rentals at campgrounds managed by these public agencies.

#### **VISITOR VOLUME**

Visitor volume estimates are calculated from the economic findings of this report and rely on visitor profile data collected for Washington State Business and Tourism Development. Travel expenditures are divided by average daily expenditures per party and then multiplied by average party size to produce a yearly estimate of visitor-days in Washington. Visitor-days divided by the average length of stay produces an estimate of the total number of visits to the state. The proportion of visits, which are made by Washington residents, are subtracted leaving an estimate of the number of out-of-state visits to the state.

#### **PRELIMINARY STATE TRAVEL IMPACTS**

Preliminary estimates are prepared at the state level only and take advantage of the most current and timely Washington data that is not yet available for each county. Estimates are based on the previous year's final state impact estimates (e.g., 2000) and updated with the most current and up-to-date information collected for the state for that year (e.g., 2001). There are three key elements used that indicate the pattern and level of travel trends occurring within the state in a given year – the transient lodging tax collections, overnight visitors at public campgrounds, and price levels of various goods and services purchased by travelers.

## DEFINITION OF TERMS

**Accommodation:** Spending for lodging by hotel and motel guests, campers, and vacation home users.

**Air Transportation:** Air passenger spending attributable to travelers in and to Washington. The spending total includes air travel spending made outside Washington for travel to Washington, purchases by Washington residents who travel outside the state, and air travel within the state.

**Campers:** Travelers staying at RV parks and commercial campgrounds or at public campgrounds such as those in state or national parks.

**Day Visitor:** A traveler whose trip does not include an overnight stay and who travels out of his/her local area (50+ miles one way).

**Destination Spending:** Spending by travelers at or near their destinations. This excludes spending on air transportation and for travel arrangement. All automobile operating expenses are included in the ground transportation component of destination spending.

**Earnings:** Total earnings include wage and salary disbursements, other earned benefits, and proprietor income. Only the earnings attributable to travel expenditures are included.

**Eating, Drinking:** Businesses serving food and beverages for immediate consumption. In addition to table service restaurants, this category includes fast-food outlets and refreshment stands.

**Employment:** Industry employment (jobs) associated with the travel-generated payroll and proprietors. This includes both full- and part-time positions.

**Expenditures:** Purchases by travelers during their trip, including lodging taxes and other applicable local and state taxes paid by the traveler at the point of sale.

**Food Stores:** Grocery stores, supermarkets, fruit stands, retail bakeries, and other businesses selling food for consumption off the premises.

**Ground Transport:** Spending on car rentals, gasoline, and other vehicle operating expenses and on local transportation such as taxi, bus, and train.

**Hotel and Motel Guests:** Travelers staying in hotels, motels, resorts, bed & breakfast establishments, condominiums, and other lodging places where the transient lodging tax is collected.

**Local Tax Receipts:** Tax revenue collected by counties and municipalities, as levied on applicable travel-related businesses (includes the transient lodging and local sales taxes).

**Private Home Guests:** Travelers staying as guests with friends or relatives.

**Receipts:** Travel expenditures less the sales and excise taxes imposed on those expenditures (also referred to as business receipts).

**Recreation:** Spending on amusement and recreation, such as admissions to tourist attractions.

**Retail Sales:** Spending for gifts, souvenirs, and other items (excludes spending listed separately, such as food stores or recreation).

**Spending Distributions:** Information from visitor surveys showing how spending by each type of visitor is divided between various business categories.

**State Tax Receipts:** State sales taxes, business and occupation taxes, motor fuel taxes, and car rental taxes attributable to travel expenditures.

**Transient Lodging Tax:** A local tax charged on lodging (also referred to as room tax, transient occupancy tax, hotel tax, or bed tax).

**Travel:** A day or overnight trip that is not of a local or commuting nature. Travel may be for business or pleasure purposes.

**Travel Arrangement:** Spending for fees paid to travel agents and tour operators.

**Traveler:** A person traveling in Washington state. A traveler may be a Washington resident or a resident of another state. The terms traveler and visitor have the same meaning in this report.

**Vacation Home User:** Travelers using their own vacation home or timeshare and those renting a vacation home or privately owned cabin where transient lodging tax is not collected.

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**TRAVEL IMPACT INDUSTRIES MATCHED TO 1997 NAICS**

<b>TRAVEL IMPACT INDUSTRY</b>	<b>NAICS INDUSTRIES* (code)</b>
Accommodation & Food Services	Accommodation (721) Food Services and Drinking Places (722) Residential Property Managers (531311)
Arts, Entertainment & Recreation	Performing Arts, Spectator Sports (711) Museums (712) Amusement, Gambling (713) Scenic and Sightseeing Transportation (487) Miscellaneous Industries (see note**)
Retail	Food & Beverage Stores (445) Gasoline Stations (447) Clothing and Clothing Accessories Stores (448) Sporting Goods, Hobby, Book, and Music Stores (451) General Merchandise Stores (452) Miscellaneous Store Retailers (453)
Ground Transportation	Interurban and rural bus transportation (4852) Taxi and Limousine Service (4853) Charter Bus Industry (4855) Passenger Car Rental (532111) Parking Lots and Garages (812930)
Air Transportation	Scheduled Air Passenger Transportation (481111) Support Activities for Air Transportation (4881)
Travel Arrangement Services	Travel Arrangement and Reservation Services (5615)

Notes: \*Government enterprises (e.g., park systems) are included in this classification.

\*\*Includes parts of industries in other sectors (e.g., accommodation, charter bus).

A more detailed description of these industries can be found at <http://www.ntis.gov/naics>.