

Tourism & Visitors Cluster Profile

Central Puget Sound Region of King, Kitsap, Pierce & Snohomish Counties



2014 Regional Employment Estimate¹: 116,306 Location Quotient: 0.96

The Tourism & Visitors cluster consists of a broad range of services and attractions that help draw tourists to the region. The **Arts, Culture & Sports, Recreation, Casinos,** and **Water Passenger Transportation** subsectors offer attractive activities that benefit both visitors and residents, increasing the regional quality of life. The **Lodging** subsector provides services for those visiting the region, and the **Travel Services** subsector helps facilitate visits to the region. The **Restaurants & Bars** subsector offers eating and drinking establishments that are supported by both visitors and residents.

Subsectors & Employment

Workers in the Restaurants & Bars subsector make up nearly half of the employment in this cluster. The Arts, Culture & Sports subsector is the second largest employer, accounting for nearly a quarter of the sector's employment. The vast majority of workers in the cluster perform food service roles, making up more than two-thirds of total employment and working across many of the cluster's subsectors. Other workers in this cluster perform support roles for the businesses and associated facilities.

Tourism & Visitors Subsector
➤ Restaurants & Bars - Full service restaurants and drinking establishments
➤ Arts, Culture & Sports - Establishments involved in the performing arts, cultural institutions, and spectator sports
➤ Lodging - Hotels, bed and breakfast inns, and recreational vehicle parks and campgrounds
➤ Recreation - Outdoor recreation facilities, including golf and country clubs, skiing facilities, marinas, amusement parks, etc.
➤ Travel Services - Travel agencies, tour operators, and convention and visitors bureaus
➤ Casinos - Casinos and gambling facilities
➤ Water Passenger Transportation ² - Transportation of people over water for travel and sightseeing purposes

Cluster Employment by Subsector³

Subsector	%
Restaurants & Bars	48%
Arts, Culture & Sports	23%
Lodging	12%
Recreation	8%
Travel Services	4%
Casinos	3%
Water Passenger Transportation ²	2%

Cluster Employment by Occupation⁴

Occupation	%
Food Service	69%
Other	9%
Personal Care	6%
Building Maintenance	5%
Administrative Support	4%
Sales	4%
Management	3%

¹ Source: PSRC Covered Employment Estimates, See 2012 Regional Economic Strategy for complete industry cluster definition

² Water Passenger Transportation subsector also related to Maritime and Transportation & Logistics clusters

³ Source: EMSI 2011 complete employment estimates

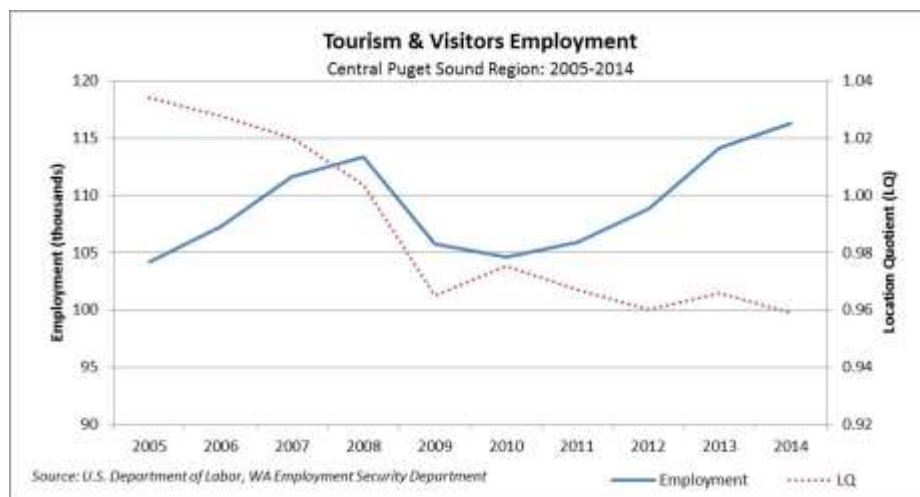
⁴ Source: WA ESD 2013 estimates

Competitiveness

The region is below national averages for employment levels in the Restaurants & Bars and Lodging subsectors. Because these two subsectors account for nearly two-thirds of total cluster employment, this drives overall location quotient for the cluster, being slightly below the national average. However for more traditional “attraction” based subsectors, the region stands out. Water Passenger Transportation, Casinos, and Recreation, show significant regional employment concentrations and the region is a top MSA for each. In addition, all three of these subsectors are projected to see double digit employment growth in the U.S. between 2012 and 2022.

LQ ⁵	Subsector	Top 6 U.S. MSAs ⁶
0.99	Restaurants & Bars U.S. jobs in the “Food services and drinking places” sector are projected to increase in the U.S. by 9% ⁷	<ul style="list-style-type: none"> • New York, NY • Los Angeles, CA • Chicago, IL • Dallas, TX • Washington, DC • Houston, TX
1.07	Arts, Culture & Sports U.S. jobs in the “Arts, entertainment, and recreation” sector are projected to increase by 11% ⁷	<ul style="list-style-type: none"> • Las Vegas, NV • New York, NY • Los Angeles, CA • Orlando, FL • Miami, FL • Chicago, IL
0.68	Lodging U.S. jobs in the “Accommodation” sector are projected to increase by 10% ⁷	<ul style="list-style-type: none"> • Las Vegas, NV • New York, NY • Los Angeles, CA • Miami, FL • Orlando, FL • Chicago, IL
1.52	Recreation U.S. jobs in the “Amusement, gambling, and recreation industries” sector are projected to increase by 12% ⁷	<ul style="list-style-type: none"> • New York, NY • Sacramento, CA • Summit Park, UT • Los Angeles, CA • Seattle, WA • Chicago, IL
1.93	Travel Services U.S. jobs in the “Travel arrangement and reservation services” sector are projected to decrease by 12% ⁷	<ul style="list-style-type: none"> • Phoenix, AZ • Miami, FL • New York, NY • Los Angeles, CA • Dallas, TX • Orlando, FL
4.95	Casinos U.S. jobs in the “Amusement, gambling, and recreation industries” sector are projected to increase by 12% ⁷	<ul style="list-style-type: none"> • Seattle, WA • Los Angeles, CA • Chicago, IL • Riverside, CA • Las Vegas, NV • San Diego, CA
7.11	Water Passenger Transportation² U.S. jobs in “Water transportation” and in “Scenic and sightseeing transportation and support activities for transportation” are each projected to increase by 19% ⁷	<ul style="list-style-type: none"> • Miami, FL • Los Angeles, CA • Seattle, WA • Honolulu, HI • New York, NY • Orlando, FL

■ = Concentration > U.S. Average ■ = Concentration < U.S. Average



⁵ Source - 2012 Location Quotients: U.S. Cluster Mapping (<http://clustermapping.us>), Institute for Strategy and Competitiveness, Harvard Business School. Copyright © 2014 President and Fellows of Harvard College. All rights reserved. Research funded in part by the U.S. Department of Commerce, Economic Development Administration.

⁶ Source - 2012 Employment Totals, Top 6 MSAs by total employment: U.S. Cluster Mapping

⁷ Source - 2012-2022 Employment Projections: U.S. Bureau of Labor & Statistics