

# Washington State Tourism – Travel Economic Impacts and Visitor Data,

Washington State Transportation,  
Commission,  
July 14, 2009,





# Washington State's Tourism Industry

# Definition of a “Tourist”

- Travels more than 50 miles one way  
*(not including a regular business commute)*

• **OR**

- Stays overnight



# Why the Tourism Industry Matters in Washington

- Tourism can help Washington recover from the economic downturn.
- \$15.7 billion in direct travel spending.
- 150,000 tourism-related jobs.
- \$1 billion in state and local taxes = without tourism, additional \$400 in annual taxes per WA family.

# Percentage of Visitor Spending by Commodity 2008

- Lodging- 18%,
- Food and Beverage- 23%,
- Ground Trans. And Motor Fuel- 26%,
- Arts, Entertainment & Recreation- 11%,
- Retail Sales and Food Stores- 17%,
- Other – 5%,



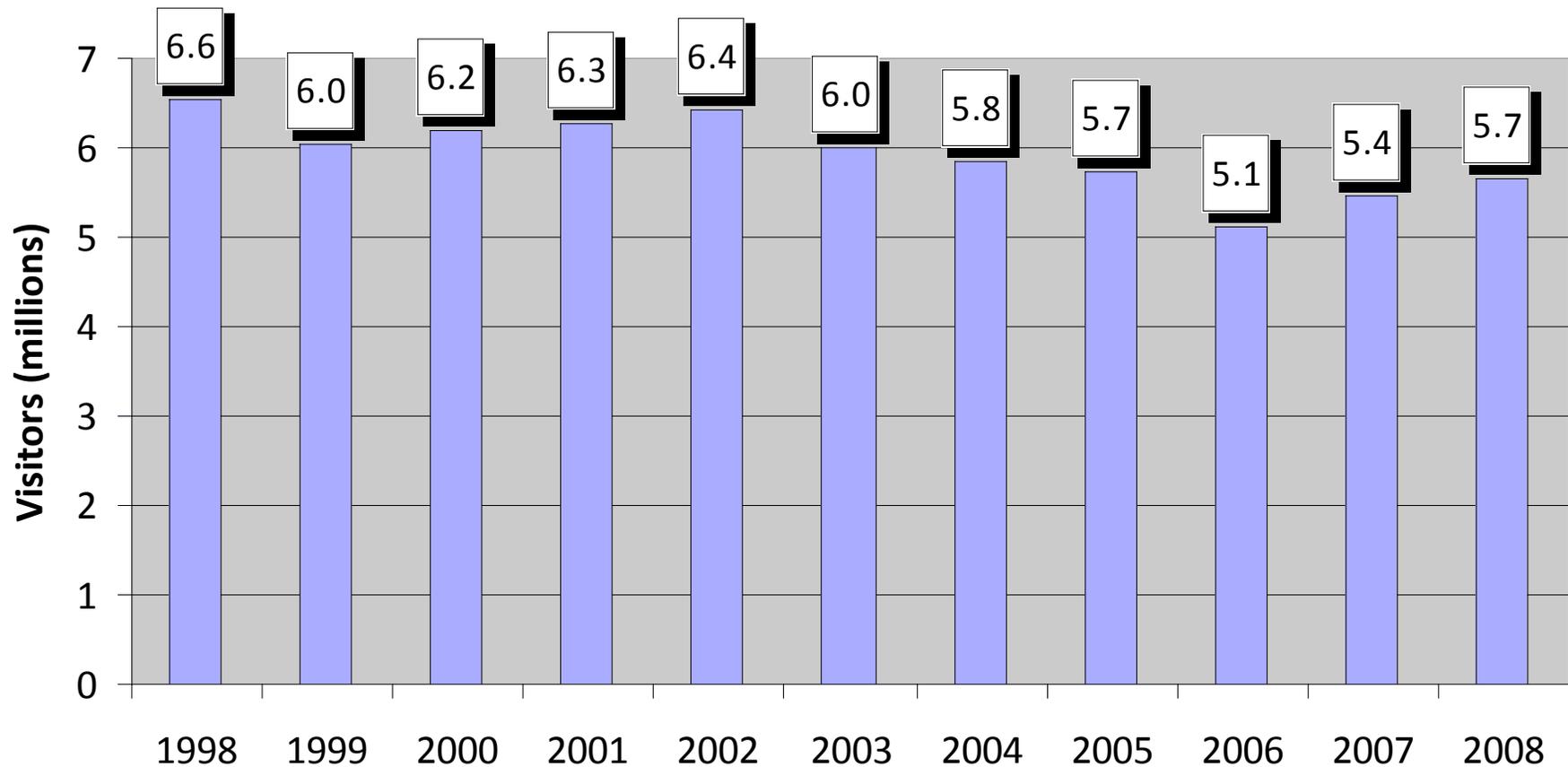
# Travel Impact Data- 2008

- Total tourism tax generation represents roughly 5% of total local and state sales tax collection and generated \$171 Million in state fuel taxes
- Represents 3% of all jobs and 2.1% of all earnings in the state
- 6 of 10 travel-generated jobs are in 5 most urbanized counties (Clark King, Pierce, Snohomish and Spokane). However, non-urban counties are more dependant on travel industry for employment.

# Why Do They Come Here?



# Estimated Visits to Washington State National Parks, 1998 - 2008



Source: U.S. National Park Service, [www.nps.gov](http://www.nps.gov)

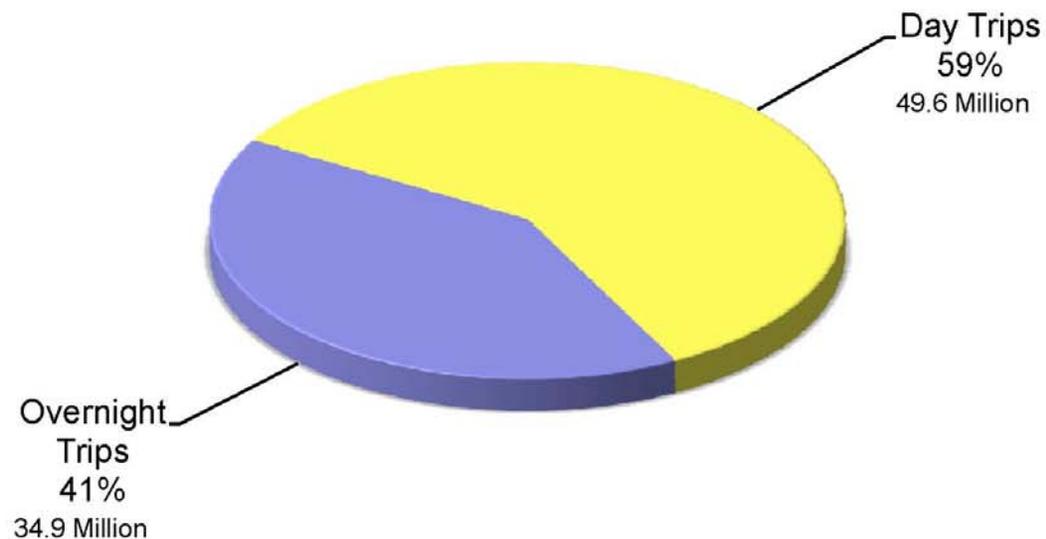


**CTED** | Community, Trade and Economic Development

# Total Size of Washington State's Travel Market



**Total Person-Trips\* = 84.5 Million**

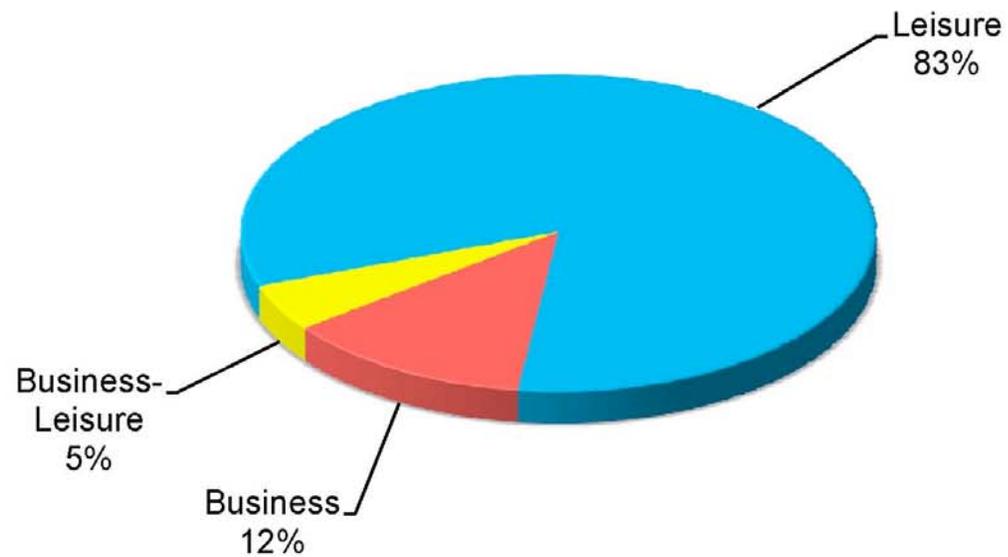


\*Total volume includes both adults and children

# Washington State's Overnight Travel Market — by Trip Purpose



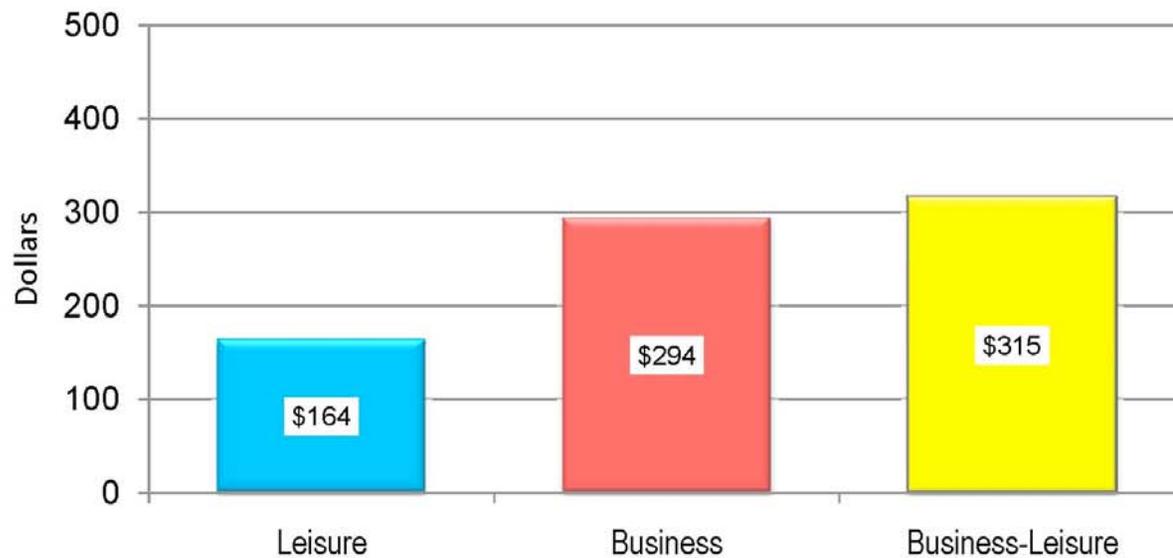
Base: Adult Overnight Person-Trips to Washington State



# Average Per Person Expenditures on Overnight — by Trip Purpose



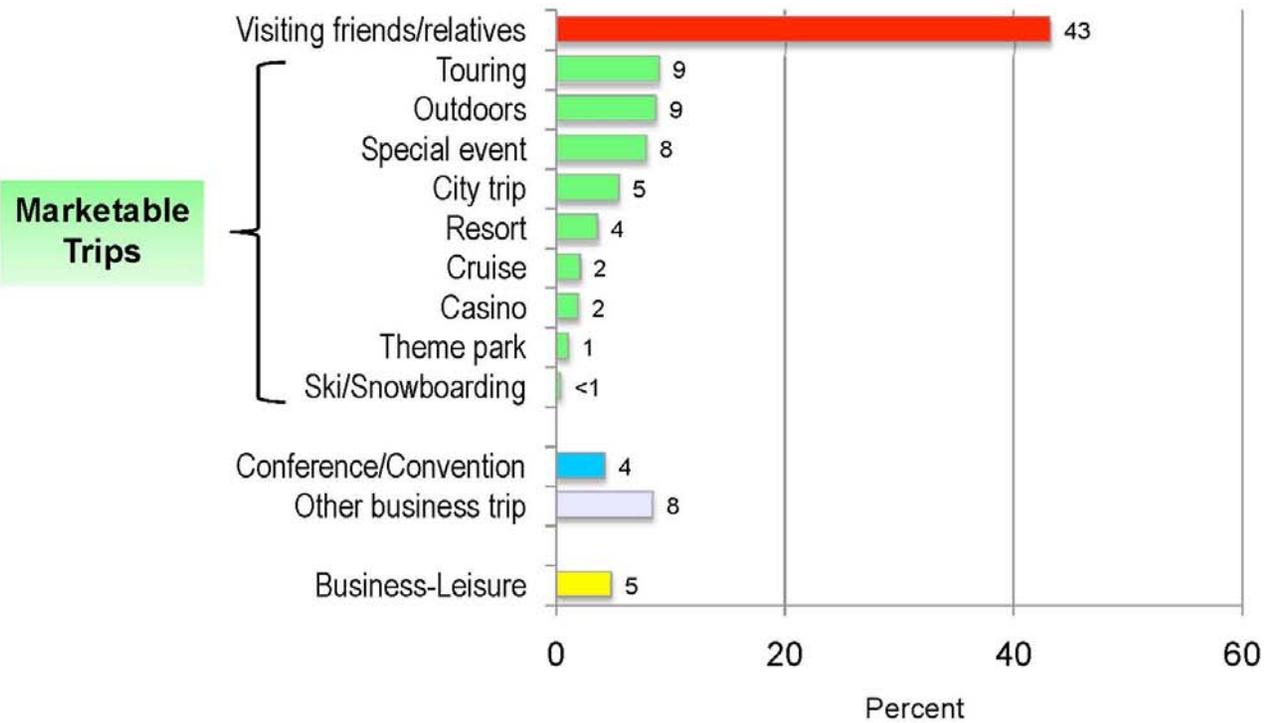
Base: Total Overnight Person-Trips to Washington State



# Main Purpose of Trip



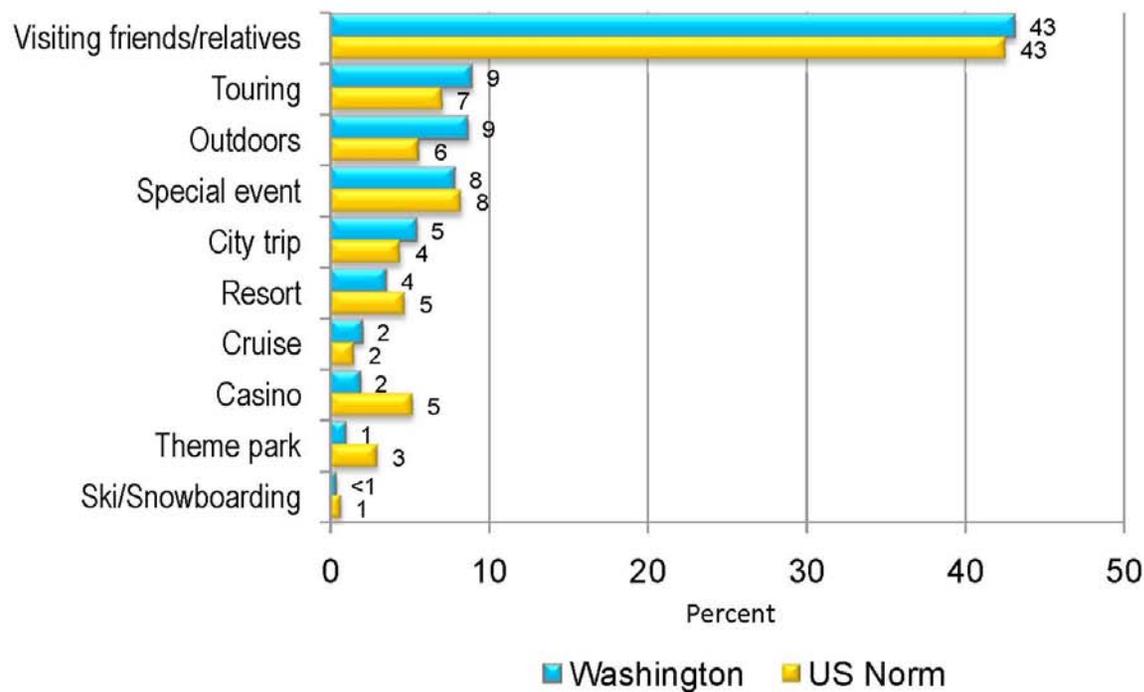
Base: Adult Overnight Person-Trips to Washington State



# Main Purpose of Leisure Trip – Washington State vs. National Norm



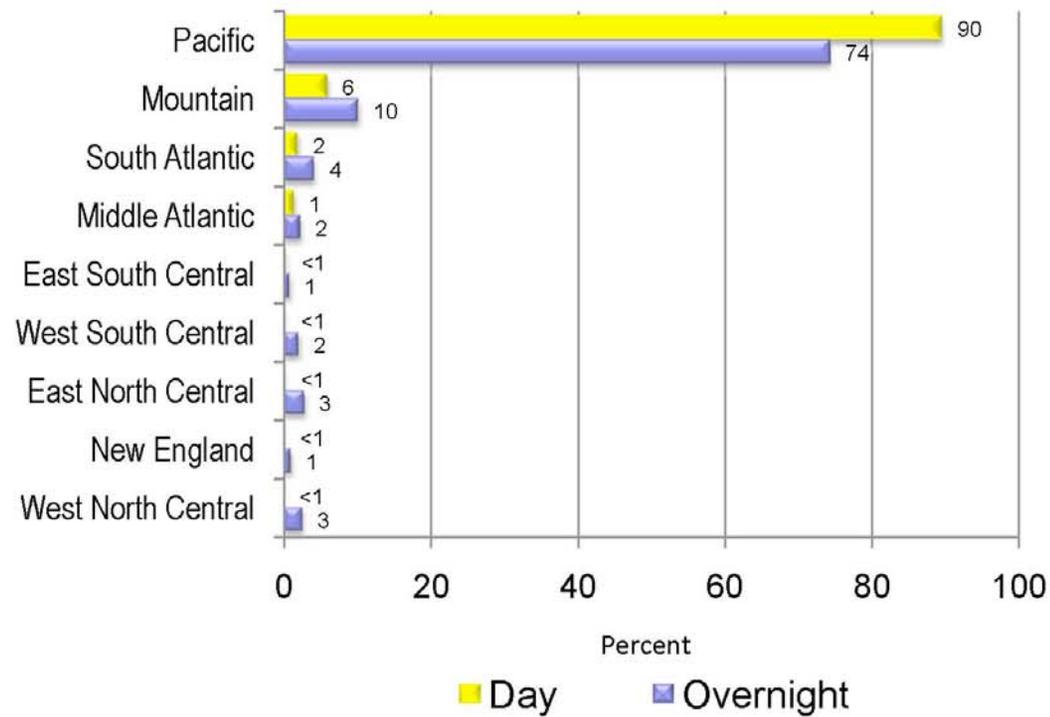
Base: Adult Overnight Person-Trips



# Region of Residence



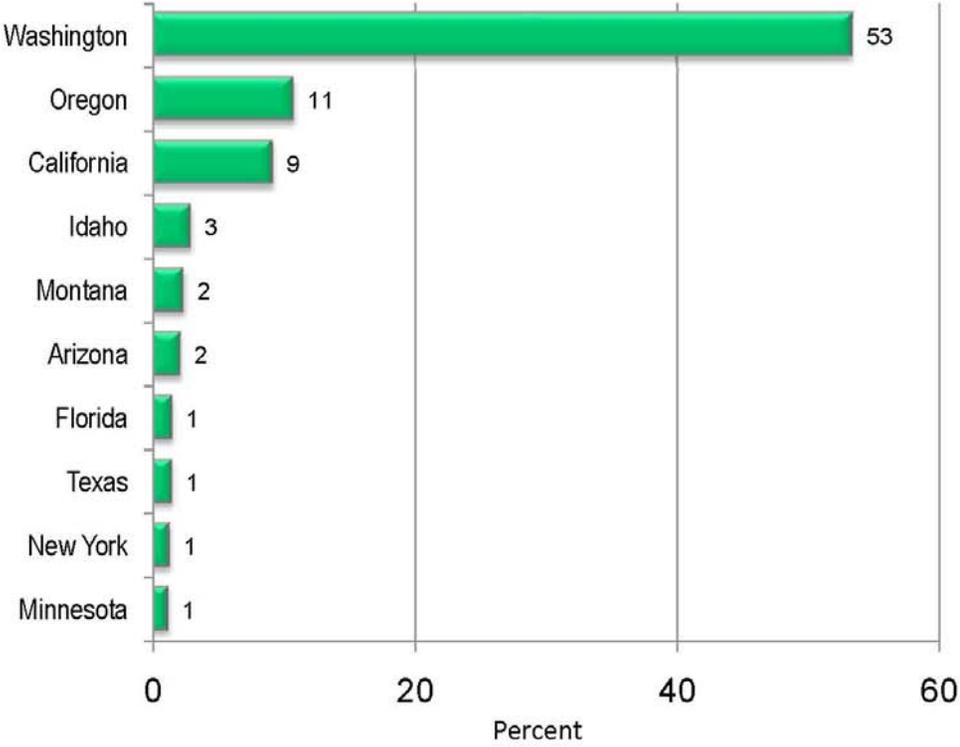
Base: Total Adult Person-Trips to Washington State



# State Origin Of Trip



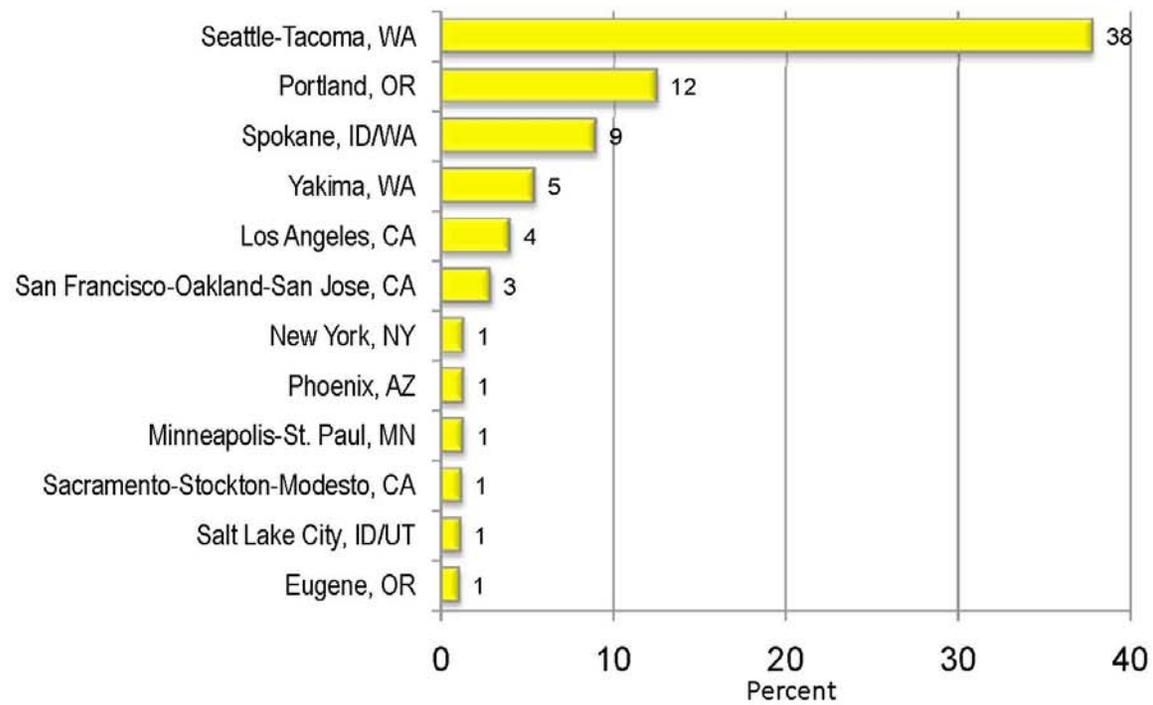
Base: Adult Overnight Person-Trips to Washington State



# DMA Origin Of Trip



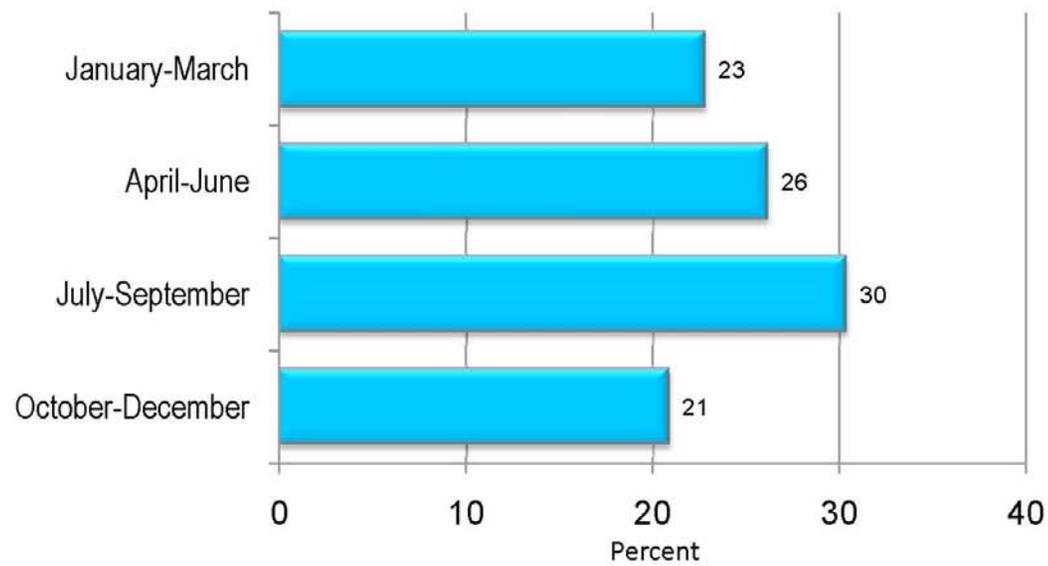
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# Season of Trip



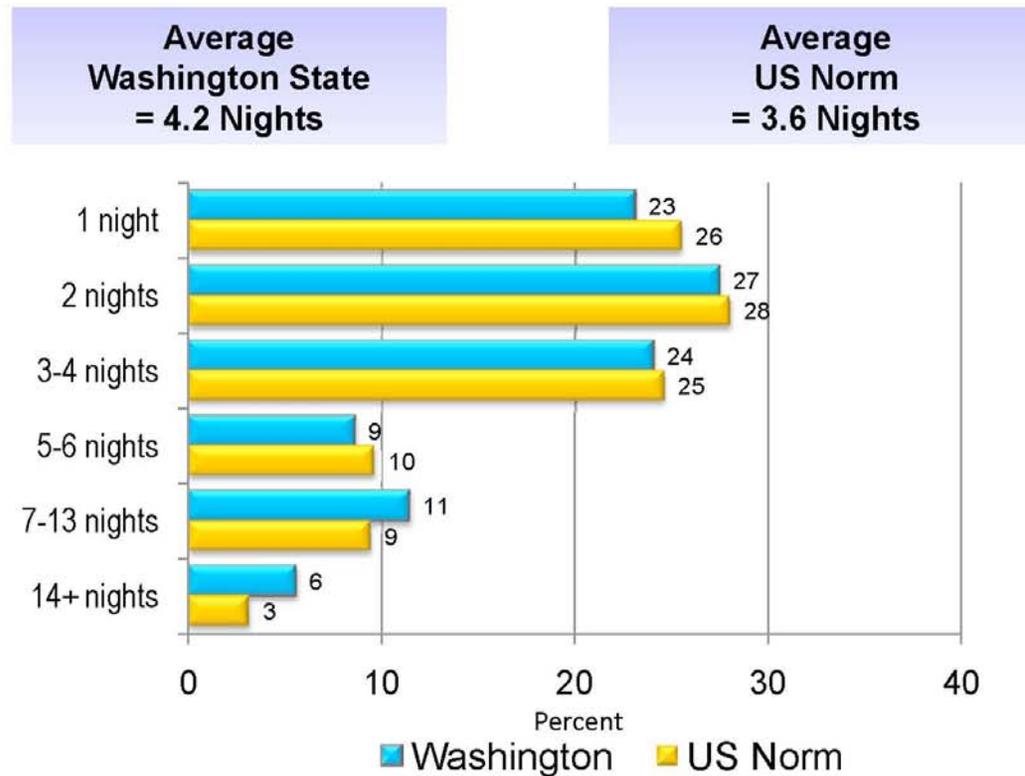
Base: Total Overnight Person-Trips to Washington State



# Total Nights Away on Trip



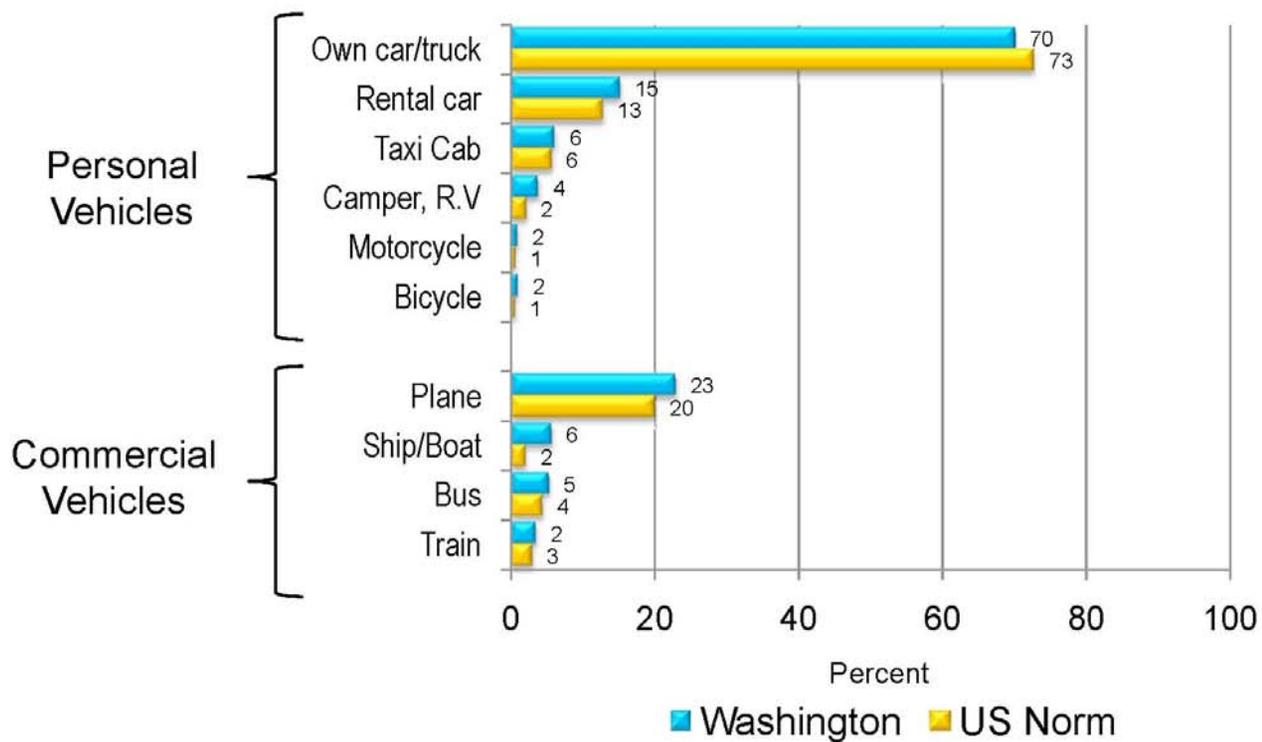
Base: Adult Overnight Person-Trips



# Transportation



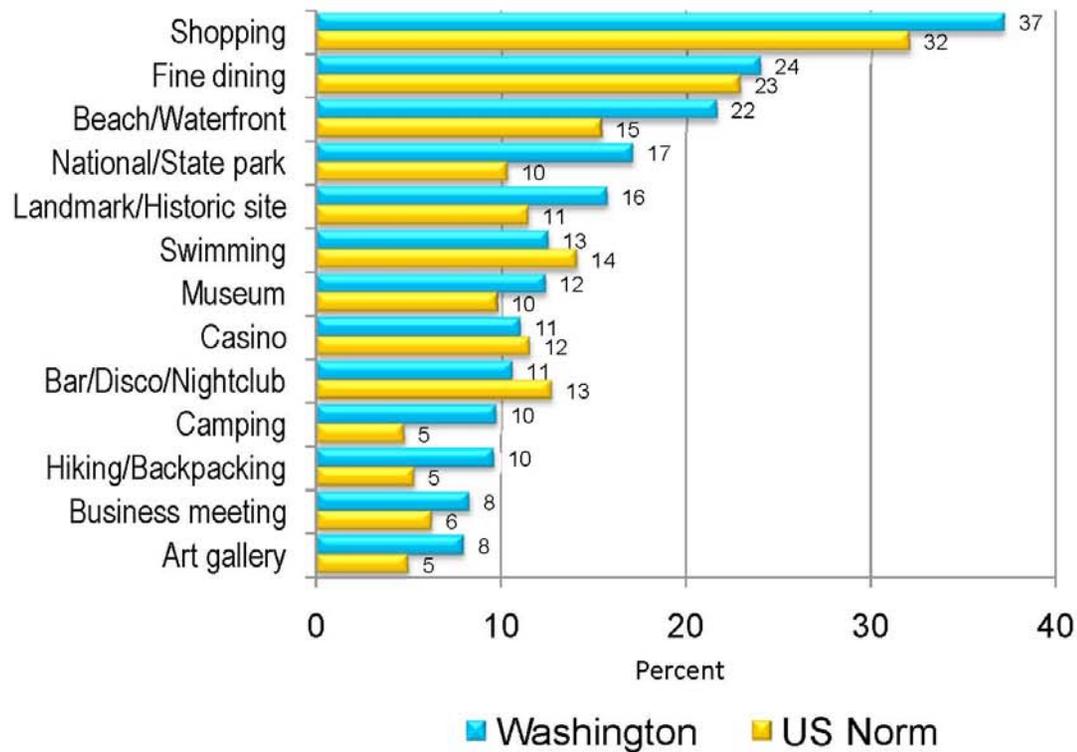
Base: Adult Overnight Person-Trips



# Activities and Experiences



Base: Adult Overnight Person-Trips



# Trends in Tourism

## 1.h Technology Rules from Destination Planning to in-Destination Decisionsh

- Americans Demand Instant Information from Qualified Sources
- Social Media Influences Travel Decisions

## 2.h Short Trips and Long Weekends are the New Norm

## 3.h Travelers Expect Personalization

## 4.h Increased Development of Niche Markets

- Culinary Tourism on the Rise
- Geo-Tourism
- “Volun-Tourism”
- Sports/Destination Events
- Multi-Generational Travel

## 5.h Travelers Search for Health and Well Being

- Americans are weary

## 6.h Outdoor Recreation is Flat or Declining

## 7.h Seniors are Staying Active

## 8.h Active Sports Demand Growing Near Urban Areas

## 9.h Growing Interest in Traveling “Green”



# Washington State Scenic Byways

- Key component of the state's marketing effort in close collaboration with WSDOT's Scenic Byways Program
- Provides the vehicle to "tell the story" of this diverse state
- Captures the history, culture and lifestyle of each region
- WSDOT's Scenic Byways program honored for "best practices" in the nation for 2008 by AASHTO



# Preliminary Forecast for Washington State Tourism Industry

- Domestic travelers:
  - More close-in travel (local, regional)
  - Shorter booking window
  - Looking for ease and value
- International travelers:
  - Pacific Northwest less severely impacted than mass-market destinations
  - Asia markets have been reactive to Swine Flu pandemic
  - Washington is an “experienced traveler” destination – not mass-market
- Cruise business:
  - Mature market for Seattle
  - Expected to remain healthy
  - Good opportunity for growth of pre/post
- 2010 Winter Olympics:
  - Increased national and international visibility
  - Expected benefit is 12-18 months following the Games



# Washington State Tourism Consumer Website

**[www.experiencewa.com](http://www.experiencewa.com)**

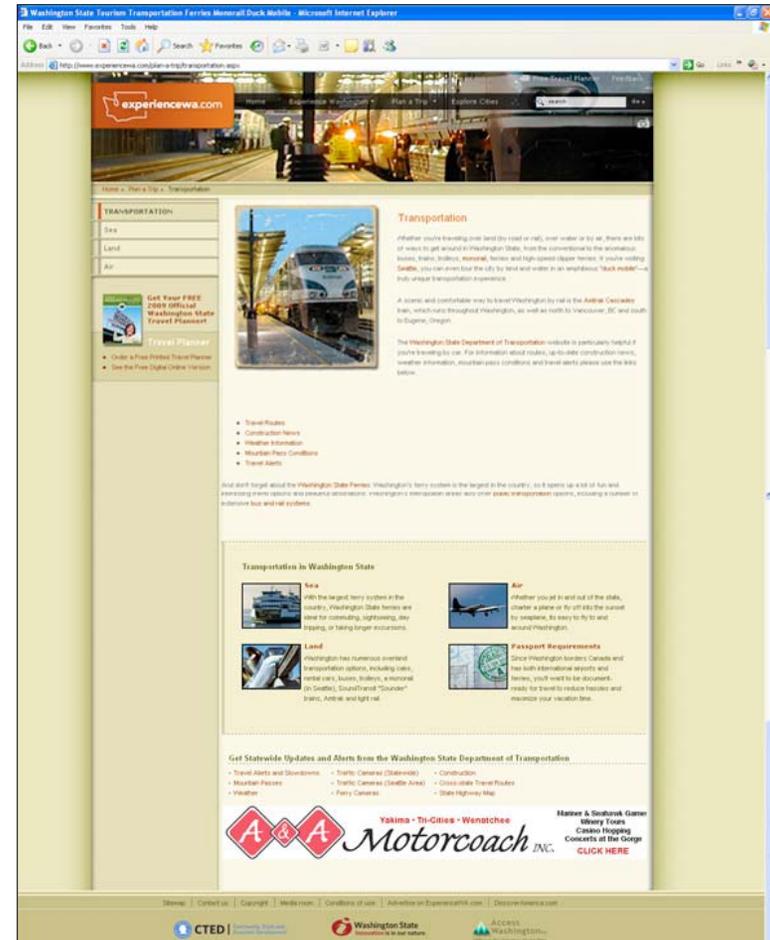
# Washington State Scenic Byways

- Key component of tourism marketing effort into close collaboration with WSDOT's Scenic Byways Program.
- Ideal vehicle to tell the story of the history, culture and lifestyle of this very diverse state.
- WSDOT's Scenic Byways Program honored for "best practices" in the nation for 2009 by AASHTO

# Scenic Byway Home Page

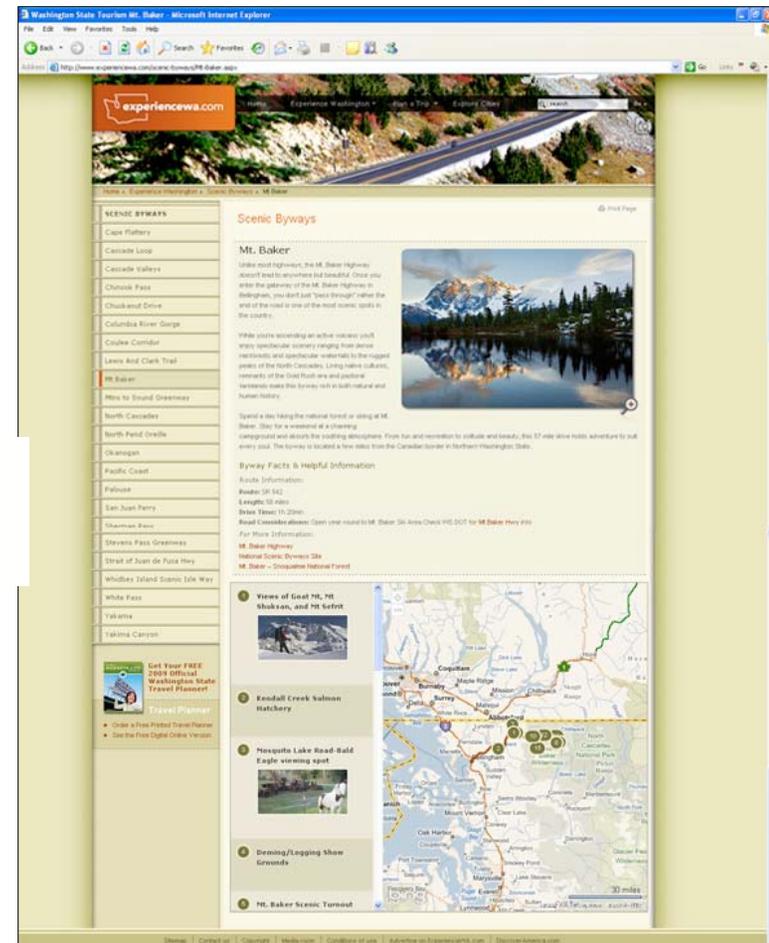
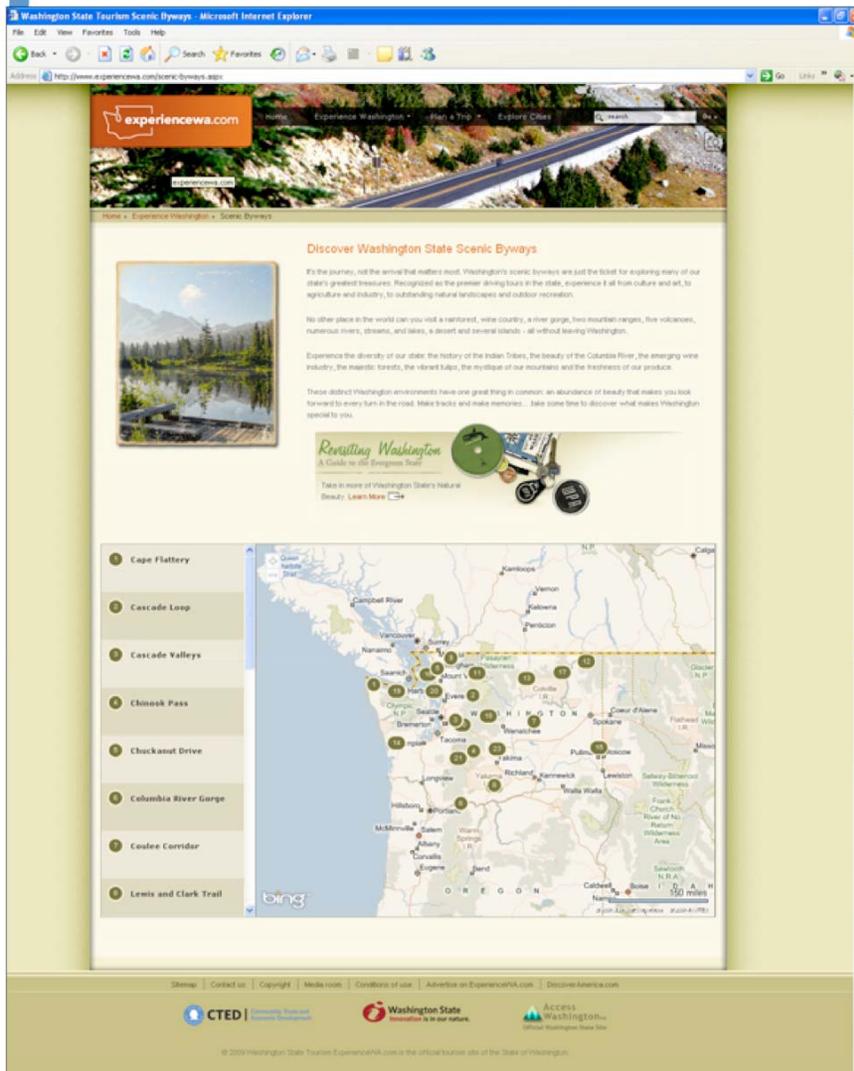


# Transportation Page



# Scenic Byways Landing Page

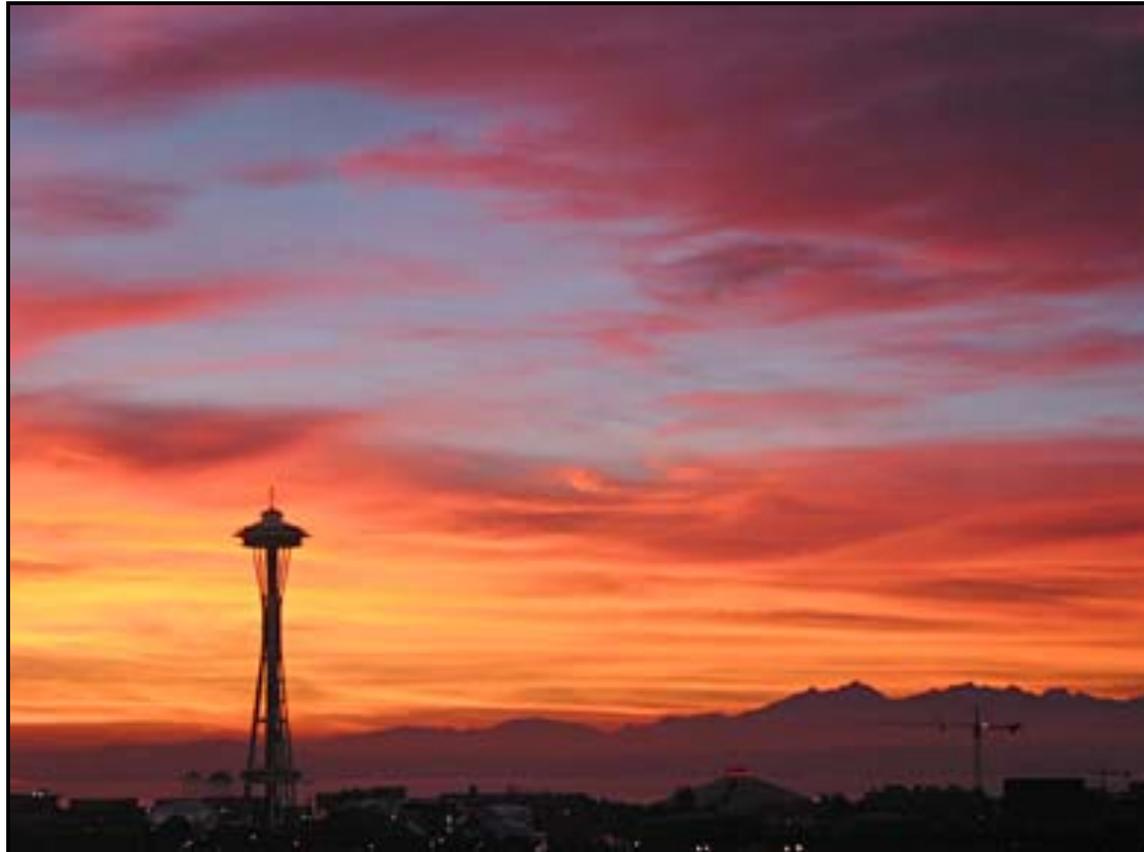
## Mt Baker Scenic Byway



# Washington State Tourism- Industry Website

- For a copy of the full reports highlighted in this presentation....and more:
- **[www.experiencewa.com/industry](http://www.experiencewa.com/industry)**

Thank you



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