

MAY 2018



HOSPITALITY & TOURISM

ANNUAL STATISTICAL REPORT



PACIFIC MOUNTAIN
WORKFORCE
DEVELOPMENT

building community prosperity



The Hospitality and Tourism sector includes lodging, restaurants, casinos, arts, entertainment and recreation.¹

Recent Developments

Tumwater Craft District mixed-use project breaks ground at Olympia Brewery site

Oyhut Bay Fresh Market opens in Ocean Shores

Adrift Hotels, Inc. renovates and reopens Shelburne Hotel in Seaview

Total Sector Employment:
22,006 jobs²

Number of worksites: 1,390³

Gross Domestic Product:
\$972,794,000⁴

Average Annual Wage:
\$22,118⁵

One out of every five Pacific County workers is employed in the tourism industry.⁶

The Alderbrook Resort & Spa hosts over 500 business meetings a year.⁷

MAJOR INDUSTRIES—HOSPITALITY & TOURISM SECTOR PACMTN 2017

Industry	Number of Worksites (establishments)	GDP (economic output)	Jobs	Average Annual Wage	Location Quotient ⁸
Accommodation	179	\$220,513,000	2,973	\$23,883	1.13
Food Services	1,011	\$457,334,000	13,153	\$18,726	0.89
Arts, Entertainment & Recreation	184	\$292,656,000	5,830	\$28,821	1.52

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INDUSTRY TRENDS

Data analysis done in 2017 shows some interesting trends in this sector, please see the tables below for a data snapshot of industries within the Hospitality & Tourism sector.

GAMBLING ESTABLISHMENTS & CASINO HOTELS ⁹		
Year	GDP	Jobs
2015	\$202,979,000	2,964
2016	\$209,140,000	3,003
2017	Not Available	227

As tribal casinos have developed into multi-feature recreation destinations, the gaming industry has become a major employer in the PacMtn region.

SNACK & NONALCOHOLIC BEVERAGE BARS		
Year	GDP	Jobs
2015	\$35,902,000	1,319
2016	\$38,123,000	1,390
2017	Not Available	1,406

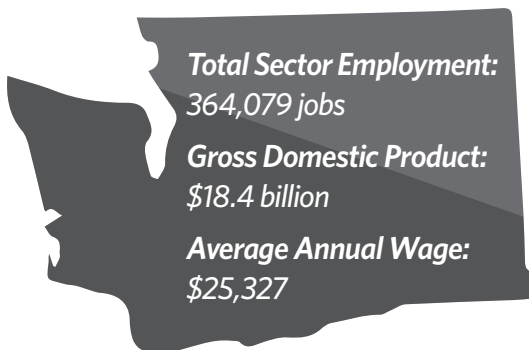
Lewis County in particular has experienced recent growth in this category as retail develops in Centralia and Chehalis. Included are coffee cafes and ice cream vendors.

NATURE PARKS		
Year	GDP	Jobs
2015	\$14,294,000	184
2016	\$16,938,000	284
2017	Not Available	584

Acquisition of new properties by several jurisdictions in the PacMtn region has spurred hiring for development and maintenance.

FITNESS & RECREATIONAL SPORTS CENTERS		
Year	GDP	Jobs
2015	\$26,469,000	761
2016	\$29,164,000	837
2017	Not Available	946

Fitness center employment has grown by 186 jobs in two years in Thurston County alone .



Learn more at www.pacmtn.org

Grays Harbor, Lewis, Mason, Pacific, Thurston Counties

WorkSource Washington and PacMtn are equal opportunity employers/programs. Auxiliary aids and services are available upon request to individuals with disabilities. WA Relay 711



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FOOTNOTES

1. The Hospitality and Tourism sector is defined by the following NAICS-coded industries: Accommodation and Food Services (72), Scenic and Sightseeing Transportation (487) and Arts, Entertainment and Recreation (71).

2. Employment data is derived from the federal Quarterly Census of Employment and Wages (QCEW). The QCEW quarterly and annual data is derived from a complete count of employer tax records and unemployment insurance records. Industry data only includes workers who work for an employer who designates the hospitality industry as their primary industry.

3. The U.S. Census Bureau defines "establishments" as "a single physical location where business is conducted or where services or industrial operations are performed." The term "worksites" is used interchangeably here with "establishments."

4. Regional Gross Domestic Product (GDP) is adapted from the U.S. Bureau of Economic Analysis (BEA) RIMS II chart of accounts and applied to data from the combined five-county PacMtn region. The BEA defines GDP as "the value of the goods and services produced by the [region's] economy less the value of the goods and services used up in production." Regional GDP is not the same as aggregate gross sales and is meant to track output that benefits the local area.

5. Average annual wage data is from Quarterly Census of Employment and Wages (QCEW) annualized averages

6. Decker, K., (2015) Sea Grant Washington presentation on Pacific County tourism. of quarterly wage earnings.

7. Patterson, L. (2018, April 23). Better Business Meetings Happen Off-Site. South Sound Magazine. Retrieved from <https://southsoundmag.com/better-business-meetings-alderbrook/>

8. "Location Quotient" is the share of the region's employment in a particular industry relative to the national average. The base is 1. Therefore, if an industry in the PacMtn area has an LQ of 2.50, that means that the local percentage of jobs in that industry in this region is two-and-a-half times greater than the national average.

9. This table combines the NAICS categories Gambling Industries (7132) and Casino Hotels (712120).