

State Snapshot



Tourism & Hospitality Services is Washington's fourth largest cluster. As of March 2010, nearly 349,000 people worked in Washington's Tourism & Hospitality Services cluster.¹ In 2009, the cluster brought in \$14.2 billion, marking a nearly 8% decrease from 2008. As with the larger United States travel industry, a substantial portion of this decrease was due to lower room rates and gasoline prices. In constant (inflation-adjusted) dollars, travel spending only decreased just shy of 2%, less than the national average. Local and state tax revenues directly generated by travel spending were \$958 million in 2009, with travel spending generating an additional \$776 million in federal tax receipts. An estimated 5.6 million domestic air passengers arrived in Washington in 2009. King, Pierce, and Snohomish Counties are the top three counties for travel spending in the state; job growth in these counties is also greater than in other areas of Washington.²

More than half of visitor spending is from residents of other states and countries; these visitors helped Seattle earn the eighteenth spot on the list of top twenty U.S. tourist destinations.³ Visitors from outside of Washington generated \$235 of tax revenue for each Washington household. Resident travel within the state generated an additional \$140 of tax revenue per household. International visitors accounted for 10% of all visitor spending in the state, while residents from other states accounted for 53% of all travel spending. Visitors who stayed overnight in commercial lodging spent \$6 billion in 2009. This represents more than one-half of all visitor spending.⁴

In February 2010, local hoteliers, attractions, and city and county representatives joined 200 industry professionals and colleagues from across Washington to convene in the state capital. They advocated for the industry in an attempt to stop proposed cuts to the state's 2009-2011 Washington State Tourism budget, which would make the state the only one in the nation without a tourism promotion budget. Efforts are currently underway to demonstrate that Tourism & Hospitality Services is a growing cluster that can produce quick economic benefit.⁵ As this report will show, tourism can create and sustain jobs and lead to major economic impact in every community. Further, it is an excellent cluster in which to begin and grow a career due to its direct and straightforward career ladder. In short, Tourism & Hospitality Services is worth checking into.

¹ (Economic Modeling Speciliasts, Inc, 2010): Not available without a paid subscription

² (Dean Runyan Associates, 2007): http://deanrunyan.com/doc_library/WAImp09pSt.pdf

³ (Puget Sound Business Journal, 2008): <http://seattle.bizjournals.com/seattle/stories/2008/07/28/daily8.html>

⁴ (Dean Runyan & Associates, 2010): http://deanrunyan.com/doc_library/WAImp09pSt.pdf

⁵ (Snohomish County Tourism Bureau, 2010): http://www.snohomish.org/files/documents/Tourism_Today_0310_All_pages.pdf

Snohomish County Snapshot

Tourism & Hospitality Services Defined

The North American Industrial Classification System (NAICS) is the current industry classification standard in the United States. NAICS breaks Tourism & Hospitality Services into two broad categories: 1) arts, entertainment, and recreation, and 2) accommodation and food services. The arts, entertainment, and recreation industry includes a wide range of establishments that operate facilities or provide services to meet cultural, entertainment, and recreational interests of customers. This includes facilities and services such as live performances, events, exhibits, historic and cultural sites, amusement, hobby, and leisure-time interests. The accommodation and food services industry includes establishments providing customers with lodging and/or preparing meals, snacks, and beverages for immediate consumption. Also included in this cluster are convention and visitor bureaus. The table below depicts 2007 NAICS codes for the Tourism & Hospitality Services cluster.⁶

NAICS Code	Industry Title
561591	Convention and visitors bureaus
7111	Performing arts companies (theater, dance, music, other)
7112	Spectator sports (sports teams, clubs, racetracks, other)
7113	Promoters of performing arts, sports, and similar events
7114	Agents and managers for artists, athletes, entertainers, and other public figures
7115	Independent artists, writers, performers
7121	Museums, historical sites, and similar institutions (including zoos, gardens, parks)
7131	Amusement parks and arcades
7132	Gambling industries
7139	Other amusement and recreation industries (golf, skiing, marinas, fitness, bowling, other)
7211	Traveler accommodation (hotels, casino hotels, bed-and-breakfast inns, other)
7212	Recreational vehicle parks and recreational camps
7213	Rooming and boarding houses
7221	Full-service restaurants
7222	Limited-service eating places (cafeterias, buffets, snack and beverage bars)
7223	Special food services (food service contractors, caterers, mobile food services)
7224	Drinking places (alcoholic beverages)

⁶ (U.S. Census Bureau, 2007): <http://www.census.gov/naics/2007/NAICOD07.HTM#N72>

Employment in Tourism & Hospitality Services

The number of workers in the Snohomish County Tourism & Hospitality Services cluster totaled over 28,000 as of March 2010. Employment within the cluster grew 34% since 2002 and decreased slightly from 2008 as a result of national and statewide drops in travel spending. The top twenty occupations in Tourism & Hospitality Services are listed in the table below.⁷

SOC Code	Occupation Title	Jobs	% of Industry
35-3021	Combined food preparation and serving workers	4,519	16%
35-3031	Waiters and waitresses	3,700	13%
35-3022	Counter attendants, cafeteria, concession, coffee shop	1,937	7%
35-2014	Cooks, restaurant	1,864	7%
35-1012	First-line supervisors of food preparers servers	1,276	5%
35-3011	Bartenders	809	3%
35-9031	Hosts and hostesses, restaurant, lounge, and coffee shop	736	3%
35-9021	Dishwashers	725	3%
11-9051	Food service managers	695	2%
35-2021	Food preparation workers	679	2%
35-9011	Dining room and cafeteria attendants, bartender helpers	664	2%
41-2011	Cashiers, except gaming	576	2%
39-9031	Fitness trainers and aerobics instructors	573	2%
27-3043	Writers and authors	553	2%
35-2011	Cooks, fast food	544	2%
39-3011	Gaming dealers	517	2%
27-2042	Musicians and singers	363	1%
39-3091	Amusement and recreation attendants	354	1%
53-3031	Driver/sales workers	325	1%
37-2012	Maids and housekeeping cleaners	287	1%

Tourism & Hospitality Services Spending and Activity

The Snohomish County Tourism & Hospitality Services cluster has generated a spark in recent years that is not fading anytime soon. Population increases have resulted in a sudden boom in hotel, motel, and restaurant construction. Occupancy is lower than usual, but new construction continues due to strong projections for future growth.

Recent studies have shown tourism to be a \$911.6 million industry in Snohomish County, up 5.9% from 2008. Tourism alone generates 9,610 jobs, \$203.2 million in payroll, \$14.7 million in local taxes, and \$51.6 million in state taxes. The Tourism & Hospitality Services cluster is economic development.

⁷ (Economic Modeling Speciliasts, Inc, 2010): Not available without a paid subscription

Snohomish County currently ranks third out of 39 counties in the state in terms of visitor spending, behind King and Pierce Counties. Urban areas present world-class attractions and hotels, while rural areas provide for exceptional nature-based tourism opportunities and wildlife viewing. This cluster is an achievable means to economic strength and diversity for the whole county.⁸

Unlike the other Snohomish County Blueprint 2015 clusters, comprehensive and detailed spending and activity updates for this cluster can be found by visiting one convenient source. The Snohomish County Tourism Bureau publishes quarterly Tourism Today newsletters, each offering nearly twenty pages of spending and activity updates ranging from accommodation developments and new restaurants to eco-tourism and agri-tourism. These newsletters are the best source of this information and, rather than cutting and pasting the information into this report, readers are instead encouraged to visit the Snohomish County Tourism Bureau website at <http://www.snohomish.org> for the latest news in this area.

Snohomish County Outlook

Tourism & Hospitality Services Forecast

The Tourism & Hospitality Services cluster represents over nine percent of jobs in Snohomish County. The industry must remain vibrant to maintain a good economic balance in the region. Forecast data indicates growth within this industry in the next five years, as shown in the table below.⁹

NAICS Code	Industry Title	2010 Jobs	2015 Jobs	% Change	Earnings Per Worker
561591	Convention and Visitors Bureaus	19	21	11%	\$41,190
7111	Performing Arts Companies (theater, dance, music, other)	449	503	12%	\$18,569
7112	Spectator Sports (sports teams, clubs, racetracks, other)	707	829	17%	\$15,047
7113	Promoters of Performing Arts, Sports, and Similar Events	370	423	14%	\$19,919
7114	Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures	91	100	10%	\$30,452
7115	Independent Artists, Writers, Performers	1,900	2,124	12%	\$10,483
7121	Museums, Historical Sites, and Similar Institutions (including zoos, gardens, parks)	75	90	20%	\$25,182
7131	Amusement Parks and Arcades	70	85	21%	\$7,882
7132	Gambling Industries	982	1,226	25%	\$30,358

⁸ (Snohomish County Tourism Bureau, 2010): http://www.snohomish.org/files/documents/Tourism_Today_0310_All_pages.pdf

⁹ (Economic Modeling Speciliasts, Inc, 2010): Not available without a paid subscription

7139	Other Amusement and Recreation Industries (golf, skiing, marinas, fitness, bowling, other)	3,258	3,467	6%	\$14,107
7211	Traveler Accommodation (hotels, casino hotels, bed-and-breakfast inns, other)	1,044	1,055	1%	\$22,030
7212	Recreational Vehicle Parks and Recreational Camps	106	102	(-1%)	\$27,077
7213	Rooming and Boarding Houses	79	84	6%	\$16,418
7221	Full-Service Restaurants	8,094	7,611	(-6%)	\$16,418
7222	Limited-Service Eating Places (cafeterias, buffets, snack and beverage bars)	9,136	9,150	0%	\$14,356
7223	Special Food Services (food service contractors, caterers, mobile food services)	1,211	1,380	14%	\$23,040
7224	Drinking Places (alcoholic beverages)	652	692	6%	\$18,028
		28,223	28,921	2%	\$17,501

Of all Tourism & Hospitality Services occupations, those in culinary arts (most specifically special food services) are projected for the most growth through 2015. Over 25% of all visitor spending was done as restaurants in 2009. The culinary arts industry is broad, covering occupations from front-line cooks and servers to food service managers and head chefs. Education for these occupations ranges from technical center programs in commercial food arts to community college programs in baking and culinary management to 4-year degree programs in supervision and hospitality management. In all of its forms, the culinary arts aspect of the Snohomish County Tourism & Hospitality Services cluster employs over 19,000 people, making up over half of the entire cluster and reinforcing its power and importance in this cluster.¹⁰ The impact of culinary arts in Snohomish County and the state is so strong that Washington State Tourism, in partnership with Washington State Department of Agriculture and the Cascade Loop Association, are working to position Washington as a premiere culinary arts destination. Communities near the Cascade Mountain Range are being targeted as areas for high growth in culinary arts. Snohomish County is a big player in this movement and expects to see results that are a win for businesses, workers, and visitors.¹¹

In an overall comparison of major industry clusters within Snohomish County, Tourism & Hospitality Services ranks lowest in earning per workers, but is showing job growth through 2015, as shown in the figure below (light yellow).¹²

¹⁰ (Economic Modeling Speciliasts, Inc, 2010): Not available without a paid subscription

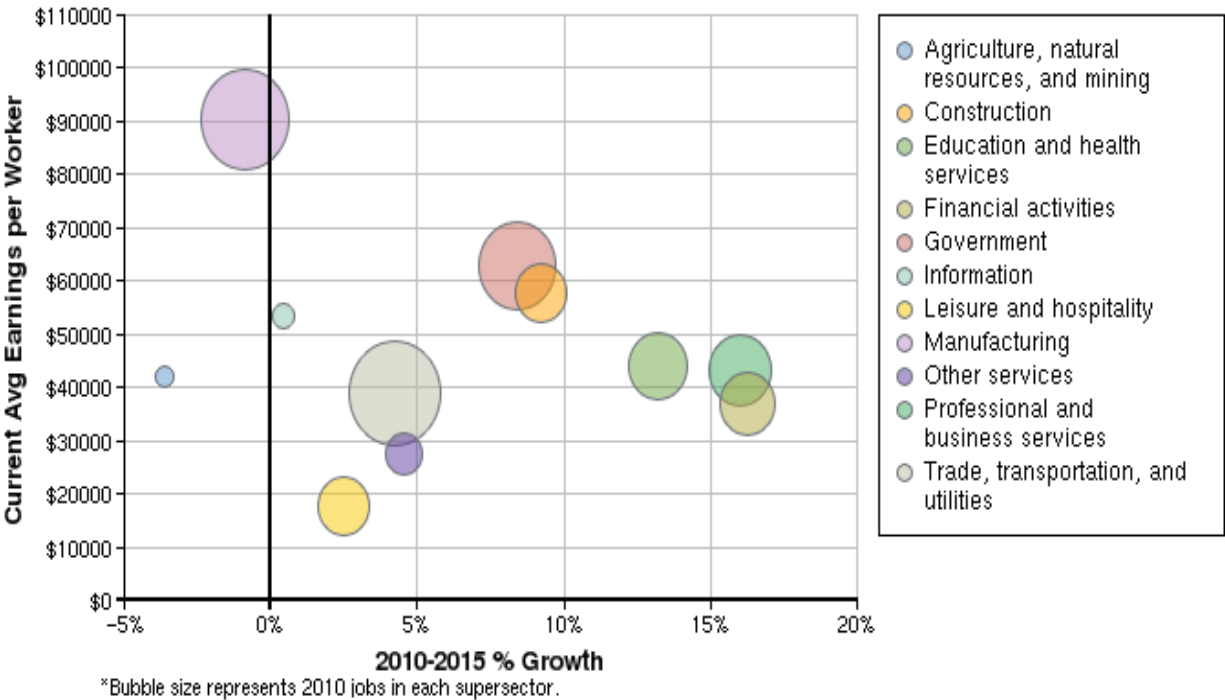
¹¹ (Snohomish County Tourism Bureau, 2010):

[http://www.snohomish.org/files/documents/Tourism Today 0310 All pages.pdf](http://www.snohomish.org/files/documents/Tourism_Today_0310_All_pages.pdf)

¹² (Economic Modeling Speciliasts, Inc, 2010): Not available without a paid subscription

Industry Size and Growth

2010 - 2015 Size and Growth



Training and Educational Needs

Tourism & Hospitality Services is an excellent cluster to begin a career, as it offers perhaps the most direct and straightforward career ladder, as shown below.¹³ Individuals can begin in the cluster with basic skills while simultaneously enrolling in education and training to advance their skills and earn promotions. For example, individuals who can learn basic core competencies such as customer service, personal service, food production, public safety, and communication will be able to apply for and likely receive a position in this cluster. These same individuals can then learn higher levels competencies such as supervision, reasoning, problem solving, training, and time management in order to move into managerial positions. Many culinary arts establishments offer on-the-job training and skills development in an effort to increase their talent pool and promote from within. To make Tourism & Hospitality Services even more attractive, it is natural for workers with any level of janitorial, cleaning, front desk, and reservations experience to enjoy a smooth transition into this cluster. Thus, this is one of the few cluster in which low-skill workers can start earning wages quickly while preparing themselves for higher-skill, higher-wage positions. These same workers would then have the opportunity to transition into specialty areas within Tourism & Hospitality Services, such as catering private parties, managing dining services events at sporting venues, and coordinating food preparation for eco-tourism tours.

¹³ (Workforce Development Council Snohomish County, 2007):
http://careertrees.org/history/documents/originalcareertrees_000.pdf

Hospitality and Tourism

Bachelor's Degree

(4 years)

\$23,000 - 143,000 per year

Golf Course Superintendents
Hotel & Motel Managers* (p. 29)
Restaurant Managers* (p. 30)
Umpires & Referees (p. 30)

Associate's Degree

(2 years)

\$20,000 - 146,000 per year

Golf Course Managers/Supervisors
Professional Athletes* (p. 30)

Short-Term or On-the-Job Training

(2 -12 months)

\$15,000 - 57,300 per year

Actors (p. 16)
Baggage Porters & Bellhops
Bakers* (p. 29)
Bartenders* (p. 29)
Buspeople
Casino Gaming Workers* (p. 29)
Chefs & Dinner Cooks* (p. 29)
Counter Attendants*
Dishwashers*
Fast Food Cooks* (p. 29)
Food Preparation Workers*
Food Service Workers*
Hotel Desk Clerks (p. 29)

Janitors* (p. 30)
Kitchen Helpers*
Maids & Housekeepers*
Recreation Guides (p. 30)
Reservation & Ticket Agents
Restaurant Hosts & Hostesses* (p. 30)
Short Order Cooks*
Taxi Drivers & Chauffeurs (p. 44)
Tour Guides (p. 30)
Travel Agents (p. 30)
Ushers*
Waiters & Waitresses* (p. 30)

Foundations for Success

Math

English

In addition to its strong career and technical education programs, which prepare workers for entry-level positions in a short period of time, the region is home to some of the most highly-esteemed hospitality management programs in the country. Edmonds Community College, Highline Community College, Lake Washington Technical College, and Seattle Community College all offer rigorous programs of study in hospitality management and related fields. Statewide, the Washington State University hospitality school is consistently ranked among the top ten in the country, and is number one in the nation for providing career services assistance to its students as they seek internships and jobs. All of these programs will play a critical role in preparing Snohomish County workers for lasting success as they step onto and move higher up the culinary arts career ladder.

Innovation and Entrepreneurship in Tourism & Hospitality Services

Tourism & Hospitality Services enterprises and organizations are under tremendous competitive pressures. In a global tourism market, they are constantly competing with new destinations and new ideas. For this reason, innovation in this cluster is a matter of routine.¹⁴ One Washington Tourism & Hospitality Service firm received international acclaim for its innovative processes. In 2007, the Washington State Convention & Trade Center was awarded with one of three Innovation Awards from the

¹⁴ (Keller, 2004): <http://www.oecd.org/dataoecd/55/48/34267885.pdf>

International Association of Congress Centers, the foremost international association of convention and exhibition centers. The award acknowledges the center's catering excellence and extensive use of local food and beverage products to drive an innovative and highly successful sales, marketing, and regional outreach program to increase revenues and expand partnerships.¹⁵

Small businesses account for 64% of new jobs in Snohomish County, and tourism businesses are comprised of mostly independent owner/operator businesses.¹⁶ Success within the Tourism & Hospitality Services cluster depends heavily on entrepreneurial skills, as most firms are small and word-of-mouth advertising is the primary method of attracting people to a venue or attraction. Thus, it is important for training programs to offer classes focusing on interpersonal skills and relationship building skills. In response, Edmonds Community College offers entrepreneurship modules with an emphasis on hospitality in tourism and travel.¹⁷

Sustainability in Tourism & Hospitality Services

To attract clientele and reduce costs, the Tourism & Hospitality Services cluster is moving toward a more environmentally conscious or green image.¹⁸ Many Snohomish County conference centers and meeting facilities make it easy for meeting planners to create the event they need while upholding their environmentally friendly and sustainable policies and practices. For example, the Lynnwood Convention Center uses locally grown and seasonal cuisine, green chemicals and cleaning products, compostable coffee cups and water glasses, and many energy conservation techniques. The Edward D. Hansen Conference Center at Everett Events Center uses solar and wind power, bio-based cleaning products, recycled mops, locally grown and organic produce, and bulk condiment dispensers for food service. Embassy Suites in Lynnwood, Holiday Inn Downtown Everett, and Inn at Port Gardner all rely in green initiatives in conducting daily business.¹⁹ Local agriculture businesses play a role in the success of Snohomish County's culinary arts. Many local farmers supply local restaurants with ingredients, thus further increasing the attractiveness of local culinary cuisine.²⁰

In addition to sustainable building and maintenance of Tourism & Hospitality Services venues, sustainable tourism is becoming more popular. The purpose of sustainable tourism is to allow tourism to develop in a way that is fair and equitable for host communities. Sustainable tourism is economically

¹⁵ (Seattle Convention and Visitors Bureau, 2007): http://www.visitseattle.org/news/0907/smn0907_2.html#convention

¹⁶ (Snohomish County Tourism Bureau, 2009): <http://www.snohomish.org/files/documents/2009%20annual%20report.pdf>

¹⁷ (Edmonds Community College): <http://www.edcc.edu/>

¹⁸ (Waste Reduction Resource Center, 2007): <http://www.wrrc.p2pays.org/indsectinfo.asp?INDSECT=29>

¹⁹ (Snohomish County Tourism Bureau, 2008)

²⁰ (Snohomish County Tourism Bureau, 2010): http://www.snohomish.org/files/documents/Tourism_Today_0310_All_pages.pdf

viable in the long-term and it avoids damage to tourist attractions and the physical environment.²¹ Throughout September and October, Snohomish County's many local farms open their doors to sustainable tourism activities. Farm festivals, corn mazes, pumpkin patches, hot air balloon rides, and old-fashioned country fun draw large numbers on weekends. The biggest salute to the area's pumpkin farms is the annual Snohomish Festival of Pumpkins, a day-long event in downtown Snohomish with pumpkin painting, costume contests, and other activities.²²

Conclusion

The Tourism & Hospitality Services cluster is growing across Washington State and Snohomish County. Demand for services, employees, and training programs continues to increase. In addition, the economic impact of the cluster continues to positively affect the region. With growth expected through 2015, Snohomish County is a great place for Tourism & Hospitality Services.

²¹ (Mullis, 2005): <http://www.environmentallyfriendlyhotels.com/sustainable-travel.html>

²² (Snohomish County Tourism Bureau, 2008)