

Travel & Tourism in Idaho



Travel, Tourism & the Outdoor Recreation Economy

An Outdoor Recreation Destination

Each year, the abundance of outdoor recreation opportunities draws millions of visitors to Idaho. In fact, the Idaho Commerce Tourism Development group reports that 88 percent of day trips and 86 percent of overnight trips in 2013 were made for the primary purpose of leisure. This report was clear to acknowledge the increasing importance of outdoor trips and experiences for Idaho's tourism, as six of the top ten most popular activities for travelers are dependent on natural, historic and cultural resources.

Economic Impact

The significance of Idaho's destination recreation opportunities on local (and statewide) economies is becoming more and more apparent. Travel and tourism in Idaho, heavily based on outdoor recreation, is supported by more than 77,000 private industry employees across the state. As travel to and within Idaho increases, employment numbers grow accordingly. Between 1998 and 2009, employment in the travel and tourism industry increased by 21 percent. According to the Outdoor Industry Association, outdoor recreation in Idaho generated \$6.3 billion in consumer spending in 2013, with a resulting \$461 million in local and state tax revenues.

It is clear that outdoor recreation is an economic driver in the state of Idaho, and the provision of these opportunities will be an essential part of the continuation of Idaho's economic success. The impact of tourism in Idaho adds to the importance of maintaining these opportunities and adapting to regional and national trends in outdoor recreation. Additionally, recreation providers should seek ways to promote the connection between outdoor recreation, tourism and the resulting economic benefits as a way to strengthen support for investments in outdoor recreation infrastructure.



Travel & Tourism Employment

Which industries include travel & tourism jobs?

What do we measure on this page?

This page describes the number of jobs (full and part-time) and the share of total jobs in industries that include travel and tourism.

Travel and Tourism: Consists of sectors that provide goods and services to visitors to the local economy, as well as to the local population. These industries are: retail trade; passenger transportation; arts, entertainment, and recreation; and accommodation and food. It is not known, without additional research such as surveys, what exact proportion of the jobs in these sectors is attributable to expenditures by visitors, including business and pleasure travelers, versus by local residents. Some researchers refer to these sectors as "tourism-sensitive." They could also be called "travel and tourism-potential sectors" because they have the potential of being influenced by expenditures by non-locals. In this report, they are referred to as "industries that include travel and tourism."

The information on this page is useful for explaining whether sectors that are likely to be associated with travel or tourism exist, and whether there are differences between geographies. It is less useful as a measure of the absolute size of employment in travel and tourism. To know this would require detailed knowledge, obtained through surveys and other means, of the proportion of a sector's employment that is directly attributable to travelers.

Employment in Travel & Tourism, 2009

	Idaho	U.S.
Total Private Employment	500,226	114,509,626
Travel & Tourism Related	77,574	17,038,626
Retail Trade	14,499	3,124,994
Gasoline Stations	6,062	855,915
Clothing & Accessory Stores	4,744	1,535,923
Misc. Store Retailers	3,693	733,156
Passenger Transportation	1,068	460,000
Air Transportation	1,038	438,336
Scenic & Sightseeing Transport	30	21,664
Arts, Entertainment, & Recreation	8,658	2,010,339
Performing Arts & Spectator Sports	1,208	428,958
Museums, Parks, & Historic Sites	172	128,641
Amusement, Gambling, & Rec.	7,278	1,452,740
Accommodation & Food	53,349	11,443,293
Accommodation	10,225	1,838,641
Food Services & Drinking Places	43,124	9,604,652
Non-Travel & Tourism	422,652	97,471,000

Percent of Total

Travel & Tourism Related	15.5%	14.9%
Retail Trade	2.9%	2.7%
Gasoline Stations	1.2%	0.7%
Clothing & Accessory Stores	0.9%	1.3%
Misc. Store Retailers	0.7%	0.6%
Passenger Transportation	0.2%	0.4%
Air Transportation	0.2%	0.4%
Scenic & Sightseeing Transport	0.0%	0.0%
Arts, Entertainment, & Recreation	1.7%	1.8%
Performing Arts & Spectator Sports	0.2%	0.4%
Museums, Parks, & Historic Sites	0.0%	0.1%
Amusement, Gambling, & Rec.	1.5%	1.3%
Accommodation & Food	10.7%	10.0%
Accommodation	2.0%	1.6%
Food Services & Drinking Places	8.6%	8.4%
Non-Travel & Tourism	84.5%	85.1%

The major industry categories (retail trade; passenger transportation; arts, entertainment, and recreation; and accommodation and food) in the table above are the sum of the sub-categories underneath them and as shown here do not represent NAICS codes. The data does not include employment in government, agriculture, railroads, or the self-employed because these are not reported by County Business Patterns. Estimates for data that were not disclosed are shown in italics in the table above.

Data Sources

U.S. Department of Commerce. 2011. Census Bureau, County Business Patterns, Washington, D.C.

Why is this Important?

Public lands can play a key role in stimulating local employment by providing opportunities for recreation. Communities adjacent to public lands can benefit economically from visitors who spend money in hotels, restaurants, ski resorts, gift shops, and elsewhere. While the information in this report is not an exact measure of the size of the travel and tourism sectors, and it does not measure the type and amount of recreation on public lands, it can be used to understand whether travel and tourism-related economic activity is present, how it has changed over time, and whether there are differences between geographies.

Methods

There is no single industrial classification for travel and tourism under the North American Industrial Classification System (NAICS). However, there are sectors that, at least in part, provide goods and services to visitors to a local economy. We reviewed the published literature to discern how others identified industries that are part of travel and tourism. These industries, which follow generally accepted standards, include (identified by 3-digit NAICS codes in parenthesis):

Components of Retail Trade: Gasoline Stations (447), Clothing and Accessory Stores (448), Miscellaneous Store Retailers (453; includes Gift, Novelty, and Souvenir)

Components of Passenger Transportation: Air Transportation (481), Scenic and Sightseeing Transportation (487)

Components of Arts, Entertainment, and Recreation: Performing Arts and Spectator Sports (711); Museums, Parks, and Historical Sites (712; includes National Parks, Conservation Areas); Amusement, Gambling, and Recreation (713; includes Golf Courses, Alpine and Cross Country Skiing Facilities)

Components of Accommodation and Food: Accommodation (721; includes ski resorts, hotels, casino hotels, campgrounds, guest ranches), Food Services and Drinking Places (722)

Data on this page were obtained from County Business Patterns. We use this source because, compared to other sources, it has fewer data gaps (instances when the federal government will not release information to protect confidentiality of individual businesses). It also includes both full and part-time employment. The disadvantage of County Business Patterns data is that it does not include employment in government, agriculture, railroads, or the self-employed and as a result under-count the size of industry sectors. Also, County Business Patterns data are based on mid-March employment and do not take into account seasonal fluctuations. For these reasons, the data are most useful for showing long-term trends, displaying differences between geographies, and showing the relationship between sectors over time.

Some data are withheld by the federal government to avoid the disclosure of potentially confidential information. Headwaters Economics uses data from the U.S. Department of Commerce to estimate these data gaps. These are indicated in italics in tables.

Additional Resources

The list of NAICS codes associated with travel and tourism were obtained from: Marcouiller, D.W. and X. Xia. 2008. "Distribution of Income from Tourism-Sensitive Employment." *Tourism Economics*. 14(3): 545-565. See: <http://www.ingentaconnect.com/content>. For a similar definition of travel and tourism, see: Wilkerson, C. 2003. "Travel and Tourism: An Overlooked Industry in the U.S. and Tenth District." *Economic Review*. Federal Reserve Bank of Kansas City. Third Quarter: 45-71. See: <http://kansascityfed.com/publicat/econrev/PDF/3q03wilk.pdf>.

Documentation explaining methods developed by Headwaters Economics for estimating disclosure gaps is available at www.headwaterseconomics.org/eps-hdt.

Because of space limitations, additional travel and tourism resources are listed on subsequent pages.

Travel & Tourism Employment

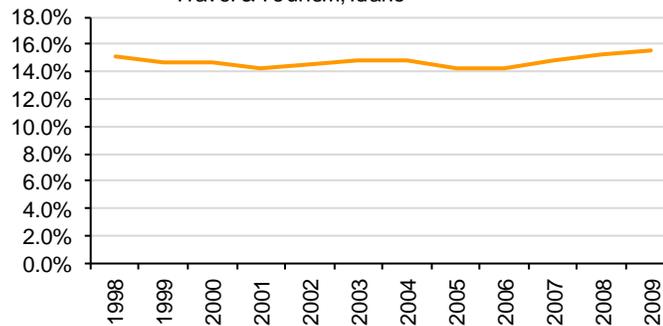
How have industries that include travel and tourism changed?

What do we measure on this page?

This page describes trends in industries that include travel and tourism as a percent of all jobs and compares industries containing travel and tourism to the rest of the economy. It also shows jobs in industries that include travel and tourism as a percent of total employment.

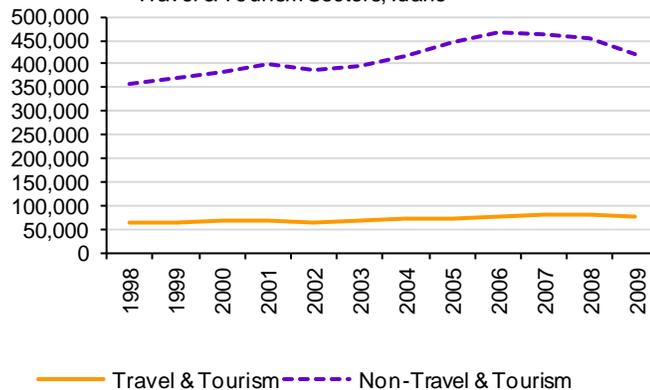
The figures on this page that show industries that include travel and tourism as a percent of total jobs do not indicate the size of all travel and tourism related activity. Rather, they show the size of sectors that generally contain travel and tourism as a component of the overall economy. The share of the sectors shown here that corresponds to travel and tourism activities will vary between geographies.

Percent of Total Private Employment in Industries that Include Travel & Tourism, Idaho



In 1998, travel & tourism represented 15.13% of total employment. By 2009, travel & tourism represented 15.51% of total employment.

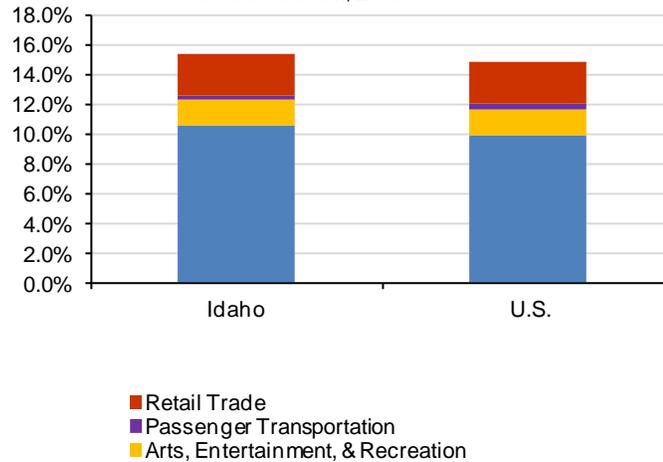
Total Jobs in Industries that Include Travel & Tourism and Non-Travel & Tourism Sectors, Idaho



From 1998 to 2009, travel & tourism employment grew from 64,104 to 77,574 jobs, a 21% increase.

From 1998 to 2009, non-travel & tourism employment grew from 359,511 to 422,652 jobs, a 17.6% increase.

Percent of Total Private Employment in Industries that Include Travel & Tourism, 2009



In, 2009, Idaho had the largest percent of total travel & tourism employment (15.5%), and U.S. had the smallest (14.9%).

Data Sources

U.S. Department of Commerce. 2011. Census Bureau, County Business Patterns, Washington, D.C.

Why is it important?

In some geographies travel and tourism is a significant driver of the economy. This can be true for "resort" economies but also for other areas that have abundant natural and social amenities, and offer recreational opportunities. Public land resources are a primary draw for pleasure travelers in many of these geographies. In some of these places, travel and tourism-related employment is growing faster than overall employment. While pleasure travel and recreation are important economic activities in and of themselves, they also stimulate other forms of economic development when visitors move families and businesses to communities they first visited as tourists.

Methods

This page reports on data and trends in sectors that are most likely to include travel and tourism. The information is useful to understand whether sectors that are likely to be associated with travel and tourism are growing or declining. It is less useful as a measure of the absolute size of employment in travel and tourism. A detailed knowledge, obtained through surveys and other means, is required to determine the proportion of a sector's employment that is due to local expenditures versus expenditures from visitors. It may be useful to supplement the information in this report with surveys and data from: (1) state tourism offices, which sometimes track indicators such as tourism employment, hotel receipts, bed taxes, etc.; (2) local Chambers of Commerce and tourism promotion groups; and (3) Forest Service, Bureau of Land Management, Fish and Wildlife Service, and National Park Service offices. In addition, it may be useful to supplement published statistics with computer models such as IMPLAN.

The top two figures on this page start in 1998 because that is the year the Census Bureau (and County Business Patterns) shifted to using the new North American Industrial Classification System (NAICS). The major industry categories (retail trade; passenger transportation; arts, entertainment, and recreation; and accommodation and food) in the bottom figure are the sum of the sub-categories from the initial page of this report and as shown here do not represent NAICS codes. Some data are withheld by the federal government to avoid the disclosure of potentially confidential information. Headwaters Economics uses data from the U.S. Department of Commerce to estimate these data gaps.

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Additional Resources

Daniel Stynes at the University of Michigan provides a web-based resource for how to measure the impacts of tourism, including surveys and computer models such as IMPLAN, as well as links to a number of useful databases and publications. See: <http://web4.canr.msu.edu/MGM2/econ>.

The Census Bureau conducts an Economic Census every five years for selected industries (the latest was in 2007). This database allows a user to search the 2002 and 2007 Economic Census for information on the number of establishments, sales, employees, and payroll, by selected industries at the county level for selected states. See: <http://www.census.gov/econ/census07>.

The Forest Service collects information on visitor satisfaction and use. Annual summary reports and individual forest and grassland reports are available from: <http://www.fs.fed.us/recreation/programs/nvum>.

The U.S. Department of Commerce developed the U.S. Travel and Tourism Satellite Accounts to estimate the proportion of every sector in the economy that is attributable to travel and tourism at the national level. This information is useful for detecting sectors that have a higher potential to serve the needs of non-locals. The resulting ratios should not be applied to local economies. For more information, see: <http://www.bea.gov/industry/iedguide.htm#ttsa>.

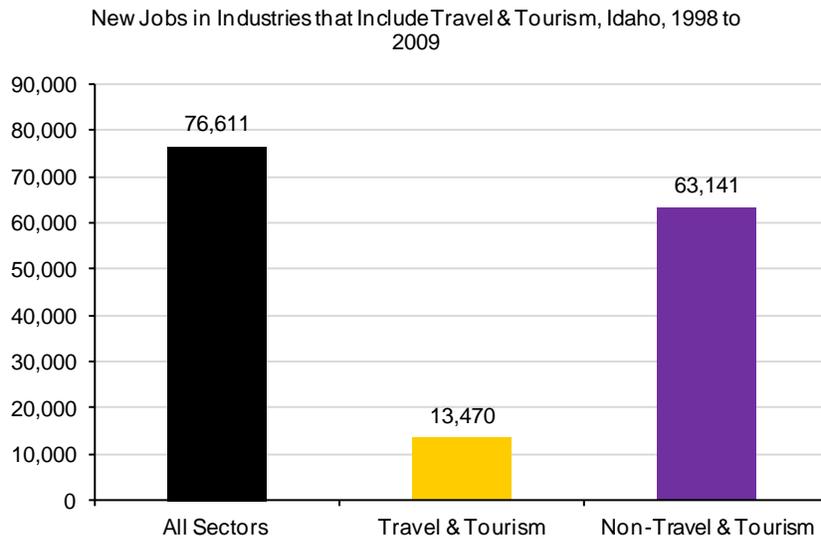
For more information on amenity-led migration, see the EPS-HDT Amenities report.

Travel & Tourism Employment

Which industries that include travel and tourism are changing the fastest?

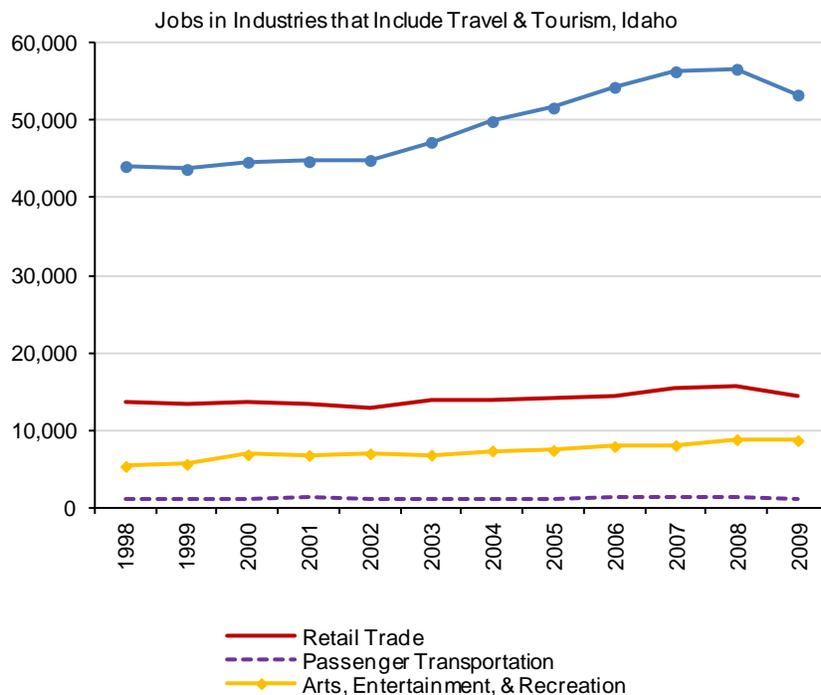
What do we measure on this page?

This page describes the change in employment in sectors that include travel and tourism compared to the change in other sectors, and compares how the various industries that include travel and tourism have changed over time.



From 1998 to 2009, travel & tourism employment grew by 13,470 jobs.

From 1998 to 2009, non-travel & tourism employment grew by 63,141 jobs.



From 1998 to 2009, retail trade grew from 13,554 to 14,499 jobs, a 7% increase.

From 1998 to 2009, passenger transportation shrank from 1,116 to 1,068 jobs, a 4.3% decrease.

From 1998 to 2009, arts, entertainment, & recreation grew from 5,328 to 8,658 jobs, a 62.5% increase.

From 1998 to 2009, accommodation & food services grew from 44,106 to 53,349 jobs, a 21% increase.

Data Sources

U.S. Department of Commerce. 2011. Census Bureau, County Business Patterns, Washington, D.C.

Why is it important?

In some geographies travel and tourism is a significant driver of the economy. This can be true for "resort" economies but also for areas that have abundant natural and social amenities, and offer recreational opportunities. Public land resources are a primary draw for pleasure travelers in many of these geographies. In some of these places, travel and tourism-related employment is growing faster than overall employment. While pleasure travel and recreation are important economic activities in and of themselves, they also stimulate other forms of economic development when visitors move families and businesses to communities they first visited as tourists.

Methods

This page reports on data and trends in sectors that are most likely to include travel and tourism. The information is useful to understand whether sectors that are likely to be associated with travel and tourism are growing or declining. It is less useful as a measure of the absolute size of employment in travel and tourism. A detailed knowledge, obtained through surveys and other means, is required to determine the proportion of a sector's employment that is due to local expenditures versus expenditures from visitors.

Data on this page were obtained from County Business Patterns. We use this source because, compared to other sources, it has fewer data gaps (instances when the federal government will not release information to protect confidentiality of individual businesses). It also includes both full and part-time employment. The disadvantage of County Business Patterns data is that it does not include employment in government, agriculture, railroads, or the self-employed and as a result under-count the size of industry sectors. Also, County Business Patterns data are based on mid-March employment and do not take into account seasonal

fluctuations. For these reasons, the data are most useful for showing long-term trends, displaying differences between geographies, and showing the relationship between sectors over time.

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Additional Resources

The Economic Research Service of the U.S. Department of Agriculture has developed a widely used classification system for identifying non-metropolitan recreation counties. See Johnson, K.M. and C.L. Beale. 2002. "Non-Metro Recreation Counties: Their Identification and Rapid Growth." *Rural America*. 17(4):12-19; available at: <http://www.ers.usda.gov/publications/ruralamerica/ra174/ra174b.pdf>.

A number of resources exist that help explain the importance of travel and tourism. See, for example: Reeder, R.J. and D.M. Brown. 2005. *Recreation, Tourism, and Rural Well-Being*. U.S. Department of Agriculture, Economic Research Service. ERR-7. 33 pp. <http://www.ers.usda.gov/publications/err7/err7.pdf>. Redder and Brown found that, compared to non-tourism dependent counties, those counties dependent on tourism have double the rate of employment growth; significantly higher levels of income and earnings per job; higher rates of population growth; lower rates of poverty; higher rates of education; better access to health care; but more expensive housing and higher rates of crime.

English, D.B.K., D.W. Marcouiller, and H.K. Cordell. 2000. "Tourism Dependence in Rural America: Estimates and Effects." *Society and Natural Resources*. 13 (3): 185-202. English et al. found that counties relatively dependent on tourism, when compared to non-tourism dependent counties, have the following characteristics: higher growth in per capita income; less economic diversity, with fewer employed in manufacturing, in particular in wood products sectors; housing that is more expensive; faster population growth; and higher levels of education. They also found that the average household income in tourism dependent counties was about the same as in nondependent counties.

The Federal Reserve Bank of Kansas City has defined travel and tourism as consisting of: hotels, air travel, and amusement and recreation services. See Wilkerson, C. 2003. "Travel and Tourism: An Overlooked Industry in the U.S. and Tenth District." *Economic Review*. Federal Reserve Bank of Kansas City. Third Quarter: 45-71. <http://kansascityfed.com/publicat/econrev/PDF/3q03wilk.pdf>. Wilkerson points out that travel and tourism related sectors outperformed the nation, including during recessions. Snepenger D., J. Johnson and R. Rasker. 1994. "Travel Stimulated Entrepreneurial Migration." *Journal of Travel Research*. Vol. 34(1): 40-44. Snepenger et al. found that tourism can stimulate permanent migration of entrepreneurs.

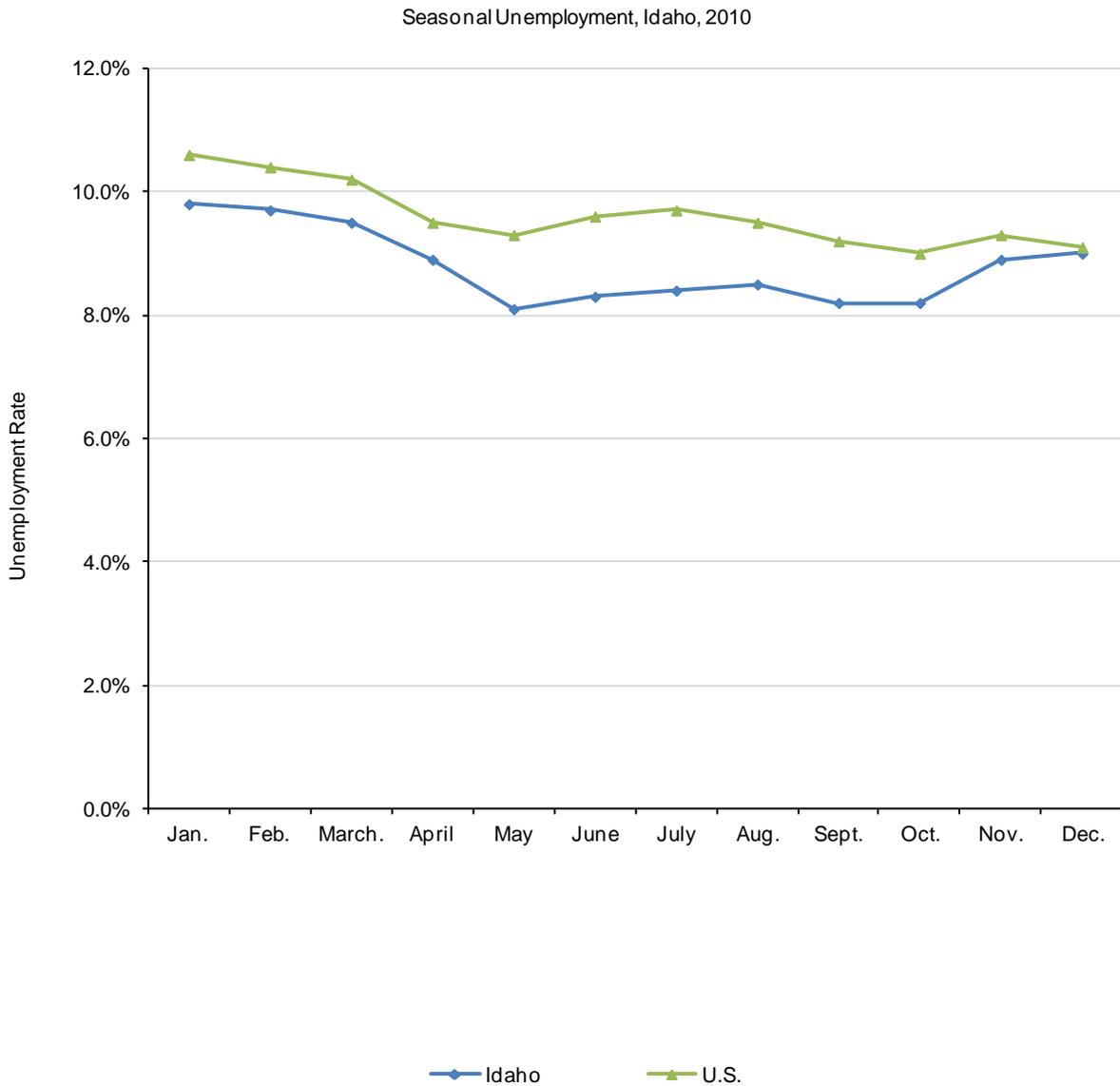
To what extent is overall employment seasonal or part time?

What do we measure on this page?

This page describes differences in the seasonality of employment and part-time work for all industries.

People with jobs (full or part-time) are employed; people who are jobless, looking for jobs, and available for work are unemployed; and people who are neither employed or unemployed are not in the labor force.

Note: If many geographies are selected, it may be difficult to read the top figure on this page.



Data Sources

U.S. Department of Labor. 2012. Bureau of Labor Statistics, Local Area Unemployment Statistics, Washington, D.C.

Why is it important?

Unemployment rate fluctuations reflect not only normal seasonal weather patterns that tend to be repeated year after year, but also the hiring and layoff patterns that accompany regular events such as the winter holiday and summer vacation season. It is possible that some seasonal workers may not live in the geography selected and therefore do not show in the unemployment figures. And seasonal unemployment also occurs in places that have a relatively high concentration in construction, fishing, and agriculture sectors.

Methods

The Bureau of Labor Statistics measures the seasonality of unemployment by tracking the change in month-to-month unemployment.

The County Business Patterns data used elsewhere in this report are based on mid-March employment and do not take into account seasonal fluctuations. March is a "shoulder" season for a number of tourism activities.

Additional Resources

For further analysis on long-term trends in unemployment, run the EPS-HDT Socioeconomic Measures report.

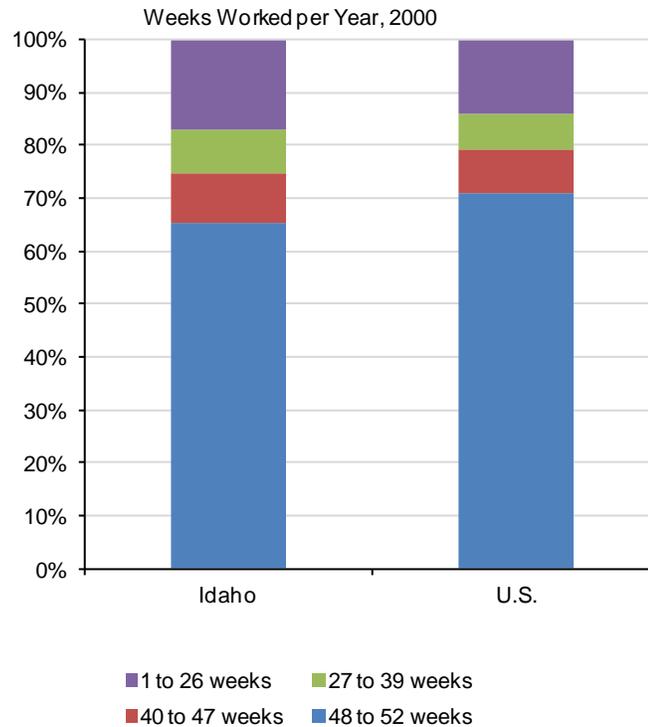
For detailed information on how the government measures unemployment, see: http://www.bls.gov/cps/cps_htgm.htm.

To what extent is overall employment seasonal or part time?

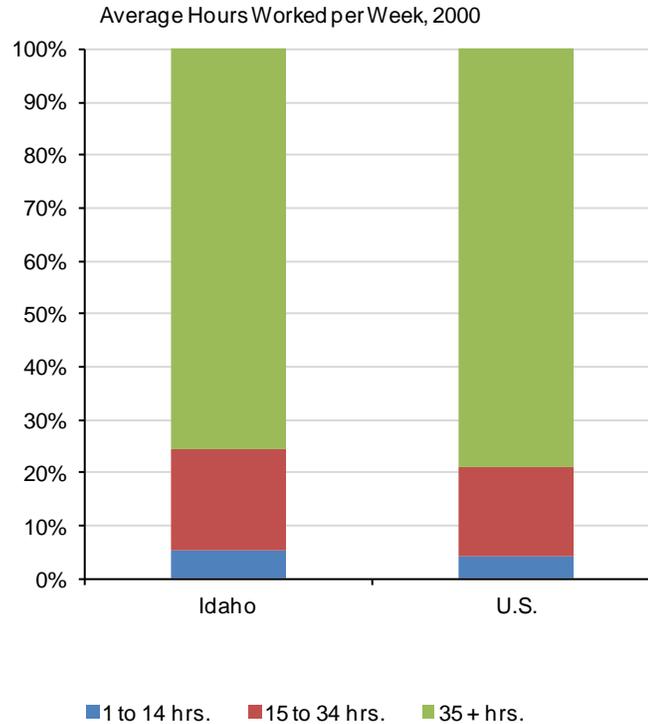
What do we measure on this page?

This page describes differences in the seasonality of employment and part-time work for all industries.

Seasonal jobs are those that vary from season to season (for example, people working in ski resorts are often seasonal workers; as are farm workers who help with seasonal harvests). This is different from part-time workers, who may or may not be seasonal but who work less than 40 hours per week.



In 2000, 25.3 percent of workers in Idaho worked less than 40 weeks over the course of the year, compared to 20.9 percent for the nation.



In 2000, 24.5 percent of workers in Idaho worked less than 35 hours per week on average, compared to 21 percent for the nation.

Data Sources

U.S. Department of Commerce. 2000. Census Bureau, Systems Support Division, Washington, D.C.

Why is it important?

Places that rely economically on tourism can have higher rates of seasonal unemployment and more part-time workers. While seasonal and part-time indicators by themselves are not measures of tourism, they can be used to complement other data in this report and from elsewhere to evaluate the nature and extent of tourism activities.

Methods

The Census Bureau provides two standard measures of part-time work: weeks worked per year and average hours worked per week. Values reported are those of individuals who reported working during 1999 and, therefore, do not include retirees, those unemployed for the entire year of 1999, or other individuals not seeking employment.

The County Business Patterns data used elsewhere in this report are based on mid-March employment and do not take into account seasonal fluctuations. March is a "shoulder" season for a number of tourism activities.

Additional Resources

Daniel Stynes at the University of Michigan provides a web-based resource for how to measure the impacts of tourism, including surveys and computer models such as IMPLAN, as well as links to a number of useful databases and publications. See: <http://web4.canr.msu.edu/MGM2/econ>.

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The Forest Service collects information on visitor satisfaction and use. Annual summary reports and individual forest and grassland reports are available from: <http://www.fs.fed.us/recreation/programs/nvum>.

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Travel & Tourism Wages

How do wages in industries that include travel and tourism compare to wages in other sectors?

What do we measure on this page?

This page describes wages (in real terms) from employment in industries that include travel and tourism, including sub-sectors, compared to wages from employment in all non-travel and tourism sectors combined. It also describes the percent of jobs in each category. These are shown together to illustrate the relative wage levels in industries that include travel and tourism, including sub-sectors, and how many people are employed in each sub-sector.

The primary purpose of this page is to compare the average annual wages between sectors and to investigate the relative number of people employed in high and low-wage sectors.

Travel and Tourism: Consists of sectors that provide goods and services to visitors to the local economy, as well as to the local population. These industries are: retail trade; passenger transportation; arts, entertainment, and recreation; and accommodation and food. It is not known, without additional research such as surveys, what exact proportion of the jobs in these sectors is attributable to expenditures by visitors, including business and pleasure travelers, versus by local residents. Some researchers refer to these sectors as "tourism-sensitive." They could also be called "travel and tourism-potential sectors" because they have the potential of being influenced by expenditures by non-locals. In this report, they are referred to as "industries that include travel and tourism."

Percent of Total Employment, 2010

	Idaho	U.S.
All Sectors		
Private	81.4%	83.1%
Travel & Tourism	12.2%	12.9%
Retail Trade	2.4%	2.3%
Gasoline Stations	1.0%	0.6%
Clothing & Accessories	0.7%	1.1%
Misc. Store Retailers	0.7%	0.6%
Passenger Transportation	0.2%	0.4%
Air Transportation	0.1%	0.4%
Scenic & Sightseeing	0.1%	0.0%
Arts, Entertainment, & Rec.	1.4%	1.5%
Performing Arts & Spectator Sports	0.2%	0.3%
Museums, Parks, & Historic Sites	0.0%	0.1%
Amusement, Gambling, & Rec.	1.2%	1.1%
Accommodations & Food	8.2%	8.7%
Accommodation	1.4%	1.4%
Food Services & Drinking Places	6.8%	7.3%
Non-Travel & Tourism	69.2%	70.2%
Government	18.6%	16.9%

Average Annual Wages, 2010 (2011 \$s)

	Idaho	U.S.
All Sectors	\$36,000	\$48,218
Private	\$35,701	\$47,917
Travel & Tourism	\$15,318	\$21,258
Retail Trade	\$18,096	\$20,557
Gasoline Stations	\$18,150	\$19,380
Clothing & Accessories	\$15,172	\$19,293
Misc. Store Retailers	\$20,930	\$24,060
Passenger Transportation	\$34,435	\$60,162
Air Transportation	\$41,300	\$62,013
Scenic & Sightseeing	\$16,111	\$28,780
Arts, Entertainment, & Rec.	\$17,292	\$33,297
Performing Arts & Spectator Sports	\$31,120	\$79,330
Museums, Parks, & Historic Sites	\$19,166	\$31,448
Amusement, Gambling, & Rec.	\$15,380	\$20,319
Accommodations & Food	\$13,718	\$17,719
Accommodation	\$16,697	\$26,744
Food Services & Drinking Places	\$13,127	\$16,034
Non-Travel & Tourism	\$39,273	\$52,804
Government	\$37,309	\$49,691

This table shows wage data from the Bureau of Labor Statistics, which does not report data for proprietors or the value of benefits; the major industry categories (retail trade, passenger transportation; arts, entertainment, and recreation; and accommodation and food) are the sum of the sub-categories underneath them and as shown here do not represent NAICS codes.

Data Sources

U.S. Department of Labor. 2011. Bureau of Labor Statistics, Quarterly Census of Employment and Wages, Washington, D.C.

Why is it important?

Industries that contain travel and tourism often pay relatively low wages, though this varies by industry sub-sector and by geography. Some important issues to consider are how travel and tourism-related industry wages compare to wages in other sectors, whether some components of the travel and tourism-related industry pay higher wages than others, and if there are significant wage differences between geographies. When comparing wage levels, it also useful to remember that many travel and tourism-related jobs are seasonal and/or part-time. Refer to the previous page of this report for more information on the extent to which work is seasonal and/or part-time.

Methods

This page reports on data in sectors that are more likely to include travel and tourism. The information is useful to understand the mix of sectors that are likely to be associated with travel and tourism. It is less useful as a measure of the absolute size of employment in travel and tourism. A detailed knowledge, obtained through surveys and other means, is required to determine the proportion of a sector's employment that is due to local expenditures versus expenditures from visitors.

The tables use wage and employment data from the Bureau of Labor Statistics, which does not report data for proprietors or the value of benefits. As a result, the employment percents may not exactly match those on earlier pages of this report from County Business Patterns.

The major industry categories (retail trade; passenger transportation; arts, entertainment, and recreation; and accommodation and food) are the sum of the sub-categories underneath them and as shown here do not represent NAICS codes. These are the same categories and sub-categories used in the initial pages of this report.

Depending on the geographies selected, some data may not be available due to disclosure restrictions.

Some data are withheld by the federal government to avoid the disclosure of potentially confidential information. Headwaters Economics uses custom data aggregations calculated from various NAICS codes. Occasionally, one or more data values underlying these aggregations are non-disclosed. These are indicated in italics in tables.

Additional Resources

For an overview of how the Bureau of Labor Statistics treats employment, see: <http://www.bls.gov/bls/employment.htm>.

For an overview of how the Bureau of Labor Statistics treats pay and benefits, see: <http://www.bls.gov/bls/wages.htm>.

Employment and wage estimates are also available from the Bureau of Labor Statistics for over 800 occupations. Looking at travel and tourism by occupation, rather than by sector or industry, is helpful since wages can vary dramatically across occupations. For more information, see: <http://www.bls.gov/oes>.

For more information on wages in non-travel and tourism industries run the EPS-HDT Socioeconomic Measures report.

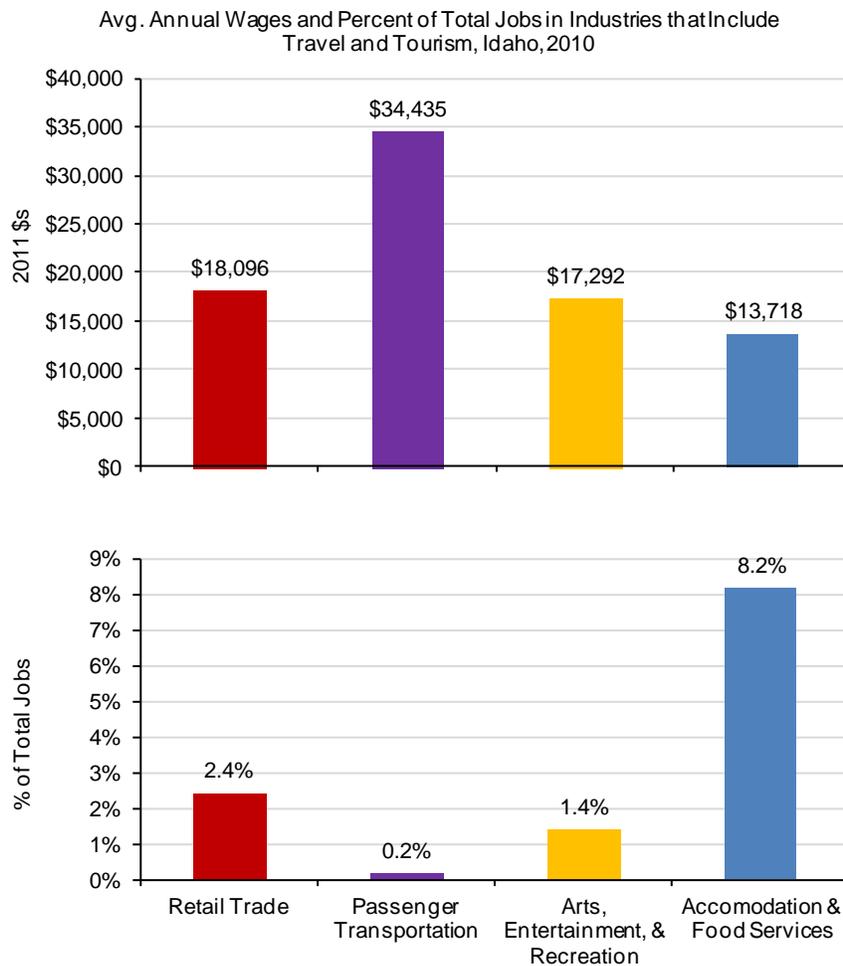
Travel & Tourism Wages

How do jobs and wages in industries that include travel and tourism compare?

What do we measure on this page?

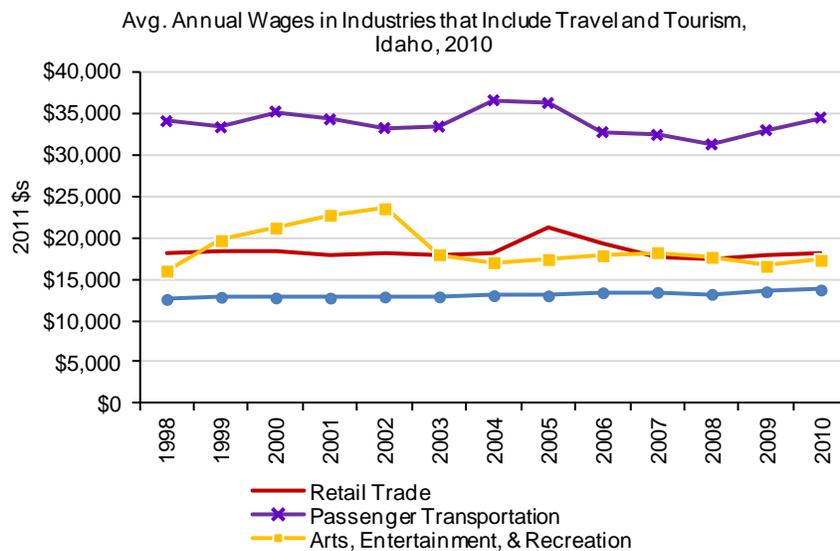
This page describes average wages (in real terms) and employment levels in industries that include travel and tourism. It also shows average wage trends (in real terms) for industries that include travel and tourism at the regional level.

The figure Avg. Annual Wages and Percent of Total Jobs in Industries that Include Travel and Tourism is useful for describing how many people are working in relatively high and low-wage travel and tourism-related industries. The figure Avg. Annual Wages in Industries that Include Travel and Tourism is useful for comparing wage trends by sector.



In 2010, travel & tourism sector average wages, from highest to lowest, were: passenger transportation (\$34,435); retail trade (\$18,096); arts, entertainment, & recreation (\$17,292); and accommodation & food services (\$13,718).

In 2010, travel & tourism sector percent of total employment, from highest to lowest, were: accommodation & food services (8.16%); retail trade (2.42%); arts, entertainment, & recreation (1.4%); and passenger transportation (0.19%).



From 1998 to 2010, the three industry sectors that include travel & tourism with the greatest change in average wages (in real terms) were: accommodation & food (\$12,581 to \$13,718, a 9% increase), arts, entertainment, & recreation (\$16,000 to \$17,292, a 8.1% increase), and passenger transportation (\$34,002 to \$34,435, a 1.3% increase).

Data Sources

U.S. Department of Labor. 2011. Bureau of Labor Statistics, Quarterly Census of Employment and Wages, Washington, D.C.

Why is it important?

While industries that include travel and tourism often pay relatively low wages, not all components of the travel and tourism-related industry pay the same wages or employ the same number of people. A significant increase in travel and tourism jobs that pay below the average for all industries will decrease overall average earnings per job. On the other hand, a significant increase in travel and tourism jobs that pay above the average for all industries will increase overall average earnings per job. A modest change in travel and tourism-related employment, especially when this is a small share of total employment, will not likely affect average earnings in a local area.

Methods

This page reports on data and trends in sectors that are more likely to include travel and tourism. The information is useful to understand whether sectors that are likely to be associated with travel and tourism are growing or declining. It is less useful as a measure of the absolute size of employment in travel and tourism. A detailed knowledge, obtained through surveys and other means, is required to determine the proportion of a sector's employment that is due to local expenditures versus expenditures from visitors.

The figures use wage and employment data from the Bureau of Labor Statistics, which does not report data for proprietors or the value of benefits. As a result, the employment percents may not exactly match those on initial pages of this report from County Business Patterns. The major industry categories (retail trade; passenger transportation; arts, entertainment, and recreation; and accommodation and food) are the sum of the sub-categories from the previous page of this report and as shown here do not represent NAICS codes. These are the same categories and sub-categories used in the initial pages of this report. The bottom figure on this page starts in 1998 to be consistent with the start date of figures on earlier pages of this report

Depending on the geographies selected, some data may not be available due to disclosure restrictions.

Additional Resources

For an overview of how the Bureau of Labor Statistics treats employment, see: <http://www.bls.gov/bls/employment.htm>.

For an overview of how the Bureau of Labor Statistics treats pay and benefits, see: <http://www.bls.gov/bls/wages.htm>.

If there are significant undisclosed data on this page, other sources for travel & tourism wage data include:

The Bureau of Labor Statistics' Quarterly Census of Employment and Wages, which has data for industries at the state level, is available at: <http://data.bls.gov:8080/PDQ/outside.jsp?survey=en>.

The Bureau of Labor Statistics' Occupational Outlook Handbook, 2010-2011 Edition, which has detailed industry earnings and wages data at the national level, is available at: <http://www.bls.gov/oco>.

The County Business Patterns database, which reports industry-level employment and payroll and can be used to estimate earnings, is available at: <http://www.census.gov/econ/cbp/index.html>.

Travel & Tourism Benchmarks

How does regional employment in industries that include travel and tourism and other measures compare to the U.S.?

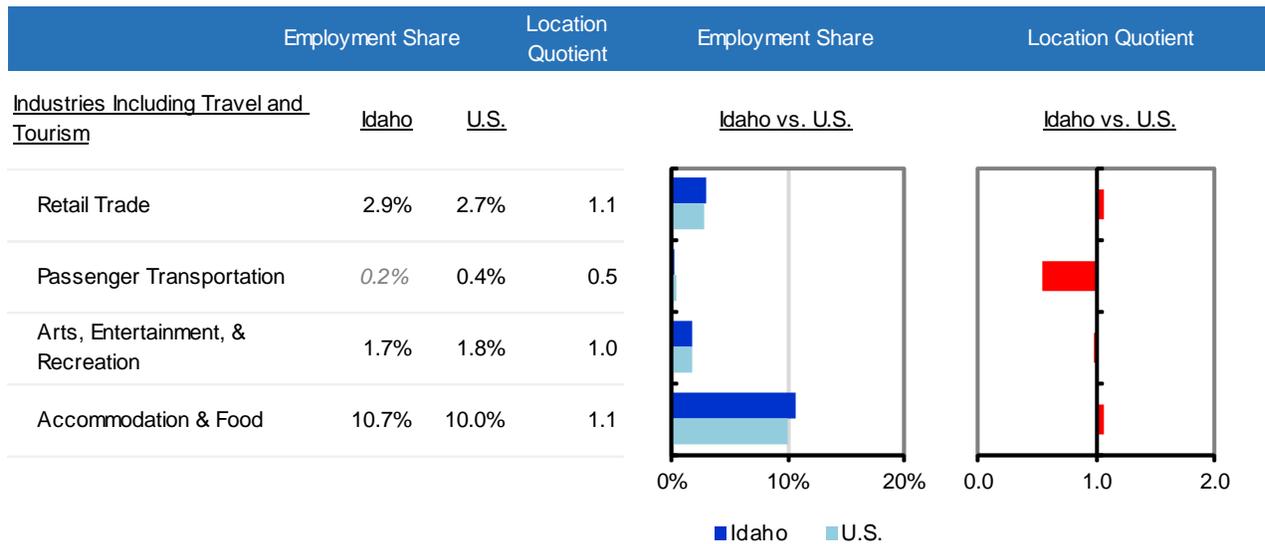
What do we measure on this page?

This page describes the difference in travel-and-tourism specialization between the region and the U.S. by comparing jobs in industry sectors that include travel and tourism as a share of total employment and with location quotients. It also shows other possible indicators of travel and tourism (part-time work and second homes) at the regional level.

Location quotient: A ratio that compares an industry's share of total employment in a region to the national share. More precisely, it is the percent of local employment in a sector divided by the percent employment in the same sector in the U.S. In other words, it is a ratio that measures specialization, using the U.S. as a benchmark. A location quotient of more than 1.0 means the local area is more specialized in that sector relative to the U.S. A location quotient of less than 1.0 means it is less specialized.

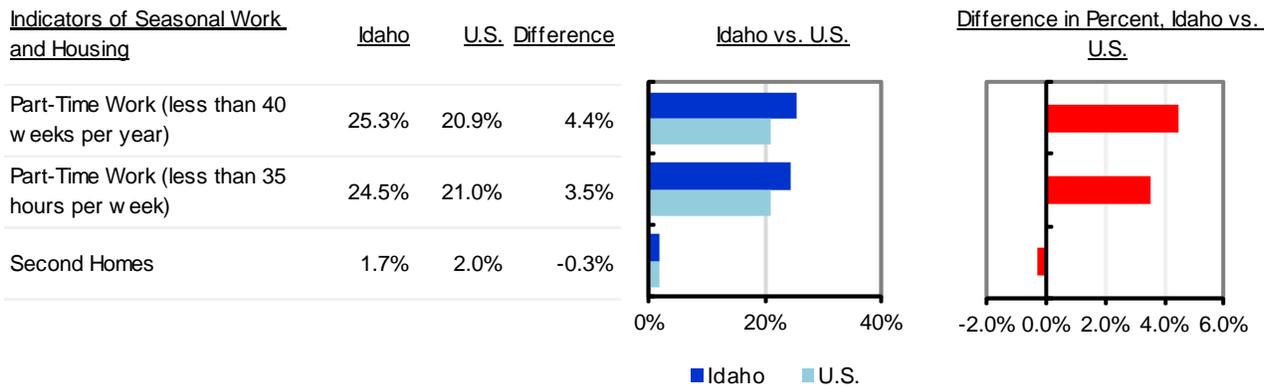
The term "benchmark" in this report should not be construed as having the same meaning as in the National Forest Management Act (NFMA).

Percent of Total Private Employment in Industry Sectors that Include Travel & Tourism, Idaho vs. U.S., 2009



In 2009, accommodation & food had the highest location quotient score (1.1) and passenger transportation had the lowest (0.5).

Other Possible Measures of the Presence of Travel and Tourism, Idaho vs. U.S., 2000



In 2000, the difference between Idaho and the U.S. in the percent of people working less than 40 weeks per year was 4.4%.

In 2000, the difference between Idaho and the U.S. in the percent of people working less than 35 hours per week was 3.5%.

In 2000, the difference between Idaho and the U.S. in the percent of homes which were second homes was -0.3%.

Data Sources

U.S. Department of Commerce. 2011. Census Bureau, County Business Patterns, Washington, D.C.; U.S. Department of Commerce. 2000. Census Bureau, Systems Support Division, Washington, D.C.

Why is it important?

Geographies with economies that focus on travel and tourism may have a competitive advantage in this area, but can also be sensitive to business cycles and other changes (e.g., a rise in fuel costs) that affect pleasure travel and recreation spending. Public lands represent a tremendous scenic and recreational resource, and travel and tourism activities related to these lands can benefit local communities and in some cases diversify rural economies that have historically been tied to commodity production. The growth of travel and tourism activities is also associated with in-migration that can lead to business relocation and new business development across a range of business sectors.

A useful way to think about location quotients is as a measure of whether a place or geography produces enough goods or services from an industry to satisfy local demand for those goods or services.

Results above or below the 1.0 standard indicate the degree to which a place or geography may import or export a good or service. Although there is no precise cutoff, location quotients above 2.0 indicate a strong industry concentration (and that an area is likely exporting goods or services) and those less than .5 indicate a weak industry concentration (and that an area is likely importing goods or services). A few caveats: (1) A large location quotient for a particular sector does not necessarily mean that sector is a significant contributor to the economy. (2) LQs greater than 1.0 only suggest potential export capacity when compared to the U.S. and do not take into account local demand. Local demand may be greater than a national average, and therefore all goods and services may be consumed locally (i.e., not exported). (3) LQs can change from year to year. (4) LQs can vary when income or wage data are used rather than employment.

Additional Resources

For a review of literature on economic diversity, see Sterling, Andrew. 1998. "On the Economics and Analysis of Diversity." Electronic Working Papers Series, University of Sussex, available at: www.sussex.ac.uk/Units/spru/publications/imprint/sewps/sewp28/sewp28.pdf.

A useful book on the evolving competitive environment for rural areas is: Gaston, William A., and Karen J. Baehler. 1995. Rural Development in the United States: Connecting Theory, Practice, and Possibilities. Washington: Island Press.

A succinct definition of a location quotient is offered by Florida State University's Department of Urban and Regional Planning: <http://mailer.fsu.edu/~tchapin/garnet-tchapin/urp5261/topics/econbase/lq.htm>.

Documentation explaining methods developed by Headwaters Economics for estimating disclosure gaps is available at www.headwaterseconomics.org/eps-hdt.

Travel & Tourism Benchmarks

How does employment in industries that include travel and tourism compare across geographies?

What do we measure on this page?

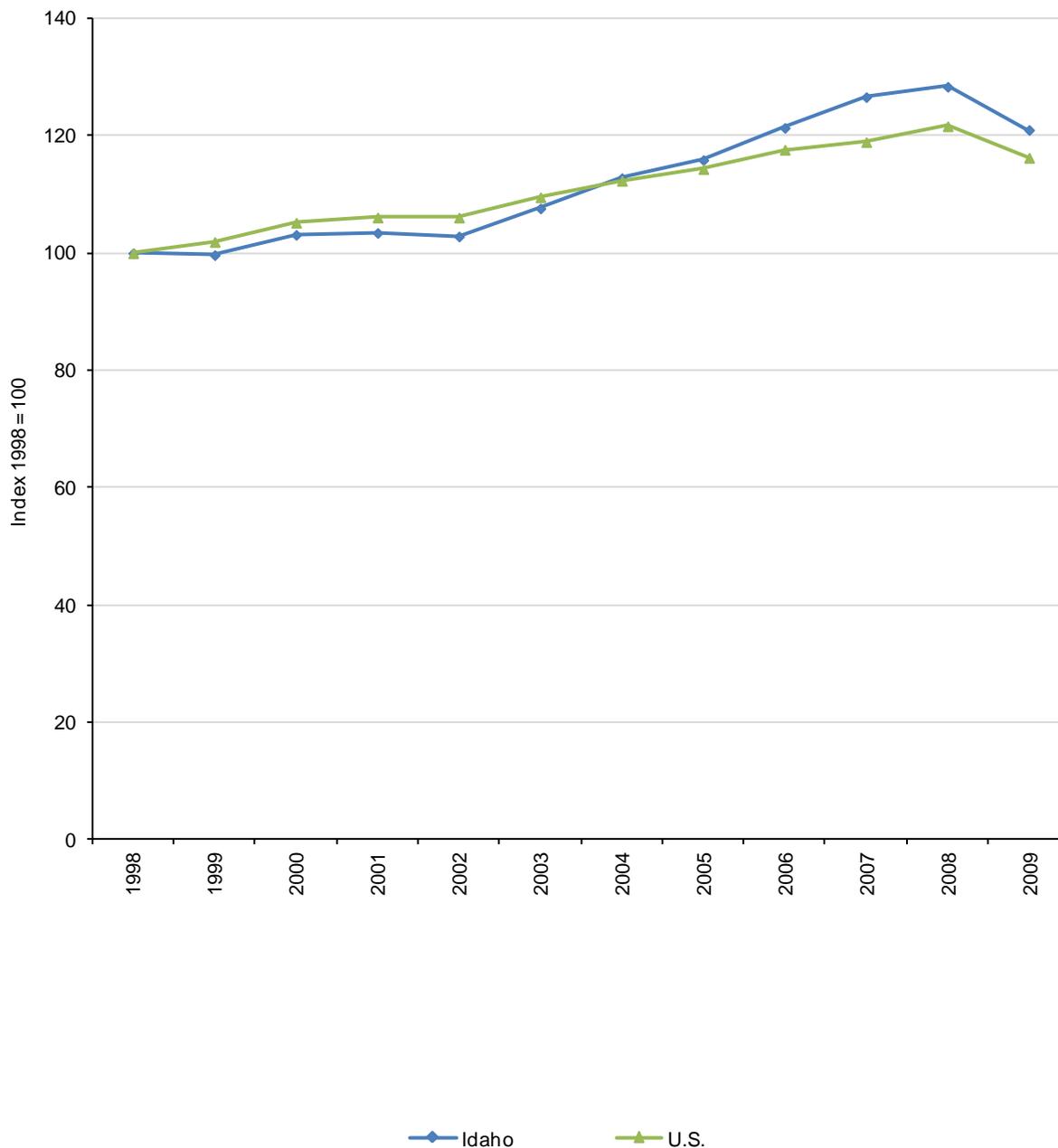
This page describes the change in employment in industries that include travel and tourism for all selected geographies and the U.S. The information is indexed (1998=100) so that data from counties with different size economies can be compared to each other, and to larger geographies. Indexing makes it easier to understand the relative rate of change in employment over time.

Index: Indexed numbers are compared with a base value. In the line chart, employment in 1998 is the base value, and is set to 100. The employment values for subsequent years are expressed as 100 times the ratio to the base value. The indexing used in the line chart enables easier comparisons between geographies over time.

The term "benchmark" in this report should not be construed as having the same meaning as in the National Forest Management Act (NFMA).

Note: If many geographies are selected, it may be difficult to read the figure on this page.

Employment in Industries that Include Travel & Tourism



From 1998 to 2009, Idaho had the fastest rate of change in travel & tourism employment, and the U.S. had the slowest.

Data Sources

U.S. Department of Commerce. 2011. Census Bureau, County Business Patterns, Washington, D.C.

Why is it important?

Not all geographies have attracted or lost travel and tourism-related employment at the same rate. An index makes it clear where the rate of travel and tourism-related growth or decline has been the fastest. Lines above 100 indicate positive absolute growth

while those below 100 show absolute decline. The steeper the curve the faster the rate of change. It may be helpful to look for large year-to-year rises or dips in figure lines to identify rapid employment changes. If the reasons behind these fluctuations are not evident, it may be helpful to talk with regional experts or locals to learn more about what caused abrupt changes.

Geographies with economies that focus on travel and tourism may have a competitive advantage in this area, but can also be sensitive to business cycles and other changes (e.g., a rise in fuel costs) that affect pleasure travel and recreation spending. Public lands represent a tremendous scenic and recreational resource, and travel and tourism activities related to these lands can benefit local communities and in some cases diversify rural economies that have historically been tied to commodity production. The growth of travel and tourism activities is also associated with in-migration that can lead to business relocation and new business development across a range of business sectors.

Methods

This page reports on trends in sectors that are more likely to include travel and tourism. The information is useful to understand whether sectors that are likely to be associated with travel and tourism are growing or declining. It is less useful as a measure of the absolute size of employment in travel and tourism. A detailed knowledge, obtained through surveys and other means, is required to determine the proportion of a sectors' employment that is due to local expenditures versus expenditures from visitors. The figure begins in 1998 because that is the year the Census Bureau (and County Business Patterns) shifted to using the new North American Industrial Classification System (NAICS). Some data are withheld by the federal government to avoid the disclosure of potentially confidential information. Headwaters Economics uses data from the U.S. Department of Commerce to estimate these data gaps.

Additional Resources

The Economic Research Service of the U.S. Department of Agriculture has developed a widely-used classification system for identifying non-metropolitan recreation counties. See Johnson, K.M. and C.L. Beale. 2002. "Non-Metro Recreation Counties: Their Identification and Rapid Growth." *Rural America*. 17(4): 12-19 ; available at: <http://www.ers.usda.gov/publications/ruralamerica/ra174/ra174b.pdf>.

Reeder, R.J. and D.M. Brown. 2005. Recreation, Tourism, and Rural Well-Being. U.S. Department of Agriculture, Economic Research Service. ERR-7. 33 pp. <http://www.ers.usda.gov/publications/err7/err7.pdf>. Redder and Brown found that, compared to non-tourism dependent counties, those counties dependent on tourism have double the rate of employment growth; significantly higher levels of income and earnings per job; higher rates of population growth; lower rates of poverty; higher rates of education; better access to health care; but more expensive housing and higher rates of crime.

English, D.B.K., D.W. Marcouiller, and H.K. Cordell. 2000. "Tourism Dependence in Rural America: Estimates and Effects." *Society and Natural Resources*. 13 (3): 185-202. English et al. found that counties relatively dependent on tourism, when compared to non-tourism dependent counties, have the following characteristics: higher growth in per capita income; less economic diversity, with fewer employed in manufacturing, in particular in wood products sectors; housing that is more expensive; faster population growth; and higher levels of education. They also found that the average household income in tourism dependent counties was about the same as in nondependent counties.

Snepenger D., J. Johnson and R. Rasker. 1994. "Travel Stimulated Entrepreneurial Migration." *Journal of Travel Research*. Vol. 34(1): 40-44. Snepenger et al. found that tourism can stimulate permanent migration of entrepreneurs.

Documentation explaining methods developed by Headwaters Economics for estimating disclosure gaps is available at www.headwaterseconomics.org/eps-hdt.

Data Sources & Methods

Data Sources

EPS-HDT uses published statistics from government sources that are available to the public and cover the entire country. All data used in EPS-HDT can be readily verified by going to the original source. The contact information for databases used in this profile is:

County Business Patterns

Bureau of the Census, U.S. Department of Commerce

<http://www.census.gov/epcd/cbp/view/cbpview.html>

Tel. 301-763-2580

Quarterly Census of Employment and Wages

Bureau of Labor Statistics, U.S. Department of Labor

<http://www.bls.gov/cew>

Tel. 202-691-6567

Local Area Unemployment Statistics

Bureau of Labor Statistics, U.S. Department of Labor

<http://www.bls.gov/lau>

Tel. 202-691-6392

2000 Decennial Census

Bureau of the Census, U.S. Department of Commerce

<http://www.census.gov>

Tel. 303-969-7750

Methods

EPS-HDT core approaches

EPS-HDT is designed to focus on long-term trends across a range of important measures. Trend analysis provides a more comprehensive view of changes than spot data for select years. We encourage users to focus on major trends rather than absolute numbers.

EPS-HDT displays detailed industry-level data to show changes in the composition of the economy over time and the mix of industries at points in time.

EPS-HDT employs cross-sectional benchmarking, comparing smaller geographies such as counties to larger regions, states, and the nation, to give a sense of relative performance.

EPS-HDT allows users to aggregate data for multiple geographies, such as multi-county regions, to accommodate a flexible range of user-defined areas of interest and to allow for more sophisticated cross-sectional comparisons.

Adjusting dollar figures for inflation

Because a dollar in the past was worth more than a dollar today, data reported in current dollar terms should be adjusted for inflation. The U.S. Department of Commerce reports personal income figures in terms of current dollars. All income data in EPS-HDT are adjusted to real (or constant) dollars using the Consumer Price Index. Figures are adjusted to the latest date for which the annual Consumer Price Index is available.

Data gaps and estimation

Some data are withheld by the federal government to avoid the disclosure of potentially confidential information. Headwaters Economics uses supplemental data from the U.S. Department of Commerce to estimate these data gaps. These are indicated in italics in tables. Documentation explaining methods developed by Headwaters Economics for estimating disclosure gaps is available at www.headwaterseconomics.org/eps-hdt.

