

Tourism, Travel, and Recreation

Overview

The lingering effects of 9/11, the war with Iraq, SARS, and difficult economic conditions presented a challenging set of circumstances for the travel industry in 2003. The increase in destination skiers, gains in the restaurant sector, and increases from regional and discount airlines helped the amount of spending and employment related to travel and tourism to improve slightly. A successful 2002 Olympic Winter Games played a significant role in attracting more destination skiers to the state in 2003. However, research has shown that people need to be reminded that the Olympics were held here. Without that reminder and an invitation to visit, potential travelers still revert back to old stereotypes when thinking about the state. As the economy improves, the amount of tourism, travel, and recreation in Utah should increase if people are reminded of what Utah has to offer.

2003 Summary

Utah Bucks the National Trend -- Again. Similar to 2002, Utah's travel and tourism sector performed quite well, considering the difficult year it has been for tourism nationally. Non-resident tourism arrivals to Utah nearly matched 2002 (Olympic-year) levels, decreasing only 0.6% to 17.2 million. The number of domestic travelers lowered scarcely, while international visitation fell 3.3%. Visitation reports indicated a minimal decrease in vehicle traffic along Utah's interstates and slightly less visitors at national parks and state-operated welcome centers. Hotel occupancies were 59.3% in 2003, a small decline of 2.8% from 2002. Despite falling prices nationally, statewide room rates decreased only slightly when compared to 2002, indicating somewhat less demand in the state's lodging sector. Hotel room rents declined 12% when compared to 2002, but that was expected due to uncharacteristically high hotel room rents for the Olympic Winter Games. Hotel room rents for 2003 surpassed room rents for 2001, continuing an upward trend that has lasted over 20 years (if 2002 is considered an outlier). The downturn in air travel continued throughout the nation in 2003, but the number of passengers at the Salt Lake International Airport basically equaled those of 2002. The long-lasting drought continued difficulties at many state parks and prompted a 22.4% decline in state park visitation during the year. A year after the Olympics, the number of skier days increased 5.6%. Destination skiers, who viewed Utah and the Olympics on television, salvaged what could have been one of the worst seasons in decades. Local skiers stayed off the slopes due to the lack of snowfall to which they have grown accustomed.¹

In 2001, consumers began retrenching, given the increase in economic uncertainty related to employment, income growth, and the stock market. Reactions to the terrorist events of September 11th prompted further changes in travel behavior. Continued economic uncertainty, combined with the war on terrorism, further embedded those changes in 2002. The war with Iraq, SARS, and a weak economy caused the trends of 2002 to continue in 2003. The most salient changes in travel behavior from 9/11 to the present include:

- ▶ Shorter trips closer to home
- ▶ Booking/reserving within two weeks of trip
- ▶ Less business travel

- ▶ Online requests for information and online booking
- ▶ Spending less
- ▶ More interest in making connections--with family, nature, heritage, and culture
- ▶ More interest in outdoor recreation activities and travel to rural America

Utah was well positioned to benefit from many of the changing travel patterns among domestic leisure visitors. Utah's gains among domestic leisure travelers, combined with the after-effects of the Olympics and a good convention year, helped offset declines in business and international travel. The increases in destination skiers and in the restaurant sector helped total traveler spending rise 1.7% in 2003 to \$4.3 billion. Total state and local taxes generated by travel spending totaled \$341 million in 2003, or \$486 per Utah household. Increases from regional and discount airlines prompted travel-related employment to increase slightly in 2003. Total travel-related employment was 107,500 in 2003, accounting for 10% of total Utah nonfarm jobs.

Perceptions of Utah and Advertising Effectiveness a Year After the 2002 Olympic Winter Games

Despite the significant gains for the state's tourism industry during the Olympic period, research indicated that part of the 2002 Olympic Winter Games legacy could be in increased tourism opportunities in the future. A survey among U.S. residents shortly after the conclusion of the event identified the following changes in Utah's domestic image:²

- ▶ Utah's image improved slightly as a result of the 2002 Olympic Winter Games
- ▶ 7.1 million more adults say they are likely to vacation in Utah than before the Games
- ▶ Utah is more recognized today for its scenic beauty, mountains, winter sports, ski resorts, cleanliness, and friendly people after exposure through the Games
- ▶ Utah's high quality workforce is more recognized by executives around the country following the Games

One can look back on 2003 and see that the Olympic Winter Games definitely had a positive affect on Utah's ski season and helped the tourism industry nearly maintain 2002 levels in spite of many obstacles. However, Utah's Olympics will become old news once the torch is lit for the 2004 Games. Additionally, the 7.1 million adults who say they are likely to vacation in Utah as a result of the Olympics are potential marginal gain directly attributed to the Olympics. Whether or not they will actually come remains to be seen. In 2003, focus groups were conducted "to determine the most appropriate message opportunity evolving from the post-Olympic afterglow into the next phase of attracting additional visitors" to the state.³ Results showed that without reminding people that the Olympics were here, people still have the following perceptions of Utah:

¹ Visitation reports collected from Salt Lake City Department of Airports, National Park Service, Utah Division of Travel Development, Utah Division of State Parks, Utah Department of Transportation, Ski Utah and the Rocky Mountain Lodging Report.

² *Measuring the Impact of the Olympic Winter Games on Utah's Image*, Wirthlin Worldwide, Spring 2002.

³ *Utah Travel Council Research Report*, Riestler-Robb, August 2003.

- ▶ Very closely associated with the Mormon religion
- ▶ More conservative than Colorado
- ▶ Limited nightlife available
- ▶ Limited activities available
- ▶ Described as desert-like, red-rocks

Once these same people were reminded that the Olympics were held in Utah, their perceptions of Utah quickly changed to talking about Utah's beauty, mountains, and sports. They remembered seeing people having fun at night during the Olympics and talked about Utah being a fun place with lots to do. The logical conclusion is that Utah's tourism industry needs to continue to remind potential visitors about the Olympics and what Utah has to offer. With some aided awareness, Utah may still benefit from the afterglow of the Olympics. Advertising is crucial as the time frame to accomplish this task is quickly narrowing.

In 2003, an advertising effectiveness study was also conducted.⁴ This was the first study of its kind for the State of Utah. One of the goals of the study was to determine the ROI for the State's advertising in 2003. Using a conservative approach, the study demonstrated that the State's advertising generated a return on investment of over \$30 million in tax revenue in 2003. Additionally, \$8 in tax revenue are generated for each \$1 spent on advertising.

2004 Outlook -- Cautious Optimism

Despite a fair amount of uncertainty, the outlook for 2004 is cautiously optimistic. Factors such as the economy, consumer confidence, the stock market, shifting travel preferences, our continued presence in Iraq, and the ever-present possibility of another major terrorist attack could cloud the view. Nonetheless, Utah tourism is expected to increase in 2004. Slow but steady growth in domestic leisure travel should occur, especially if the economy continues to improve. Business travel is predicted to remain weak, but as more and more signs point to a healthier economy, business travel may eventually increase. International travel is expected to grow despite new government security policies that discourage travel to the U.S. The federal government will spend \$50 million to promote international travel to the U.S. While \$50 million is a small amount when promoting the U.S. to the entire world, one may hope that some promotions will include Utah destinations and/or an emphasis on Western heritage and national parks. Additionally, the Travel Industry Association of America and others are actively promoting the nation's national parks, and Utah should benefit. Early snowfall allowed most Utah ski resorts to open early, and optimism is high for a successful ski year.

Competition among nearby destinations for the local and regional markets will continue to intensify as marketers continue to focus their priorities towards close-to-home markets and quick getaways. Many western states spend much more on marketing and advertising than Utah to attract their visitors, and the battle for market share is constant. National trends highlight opportunities in key segments of the travel market including adventure travel, cultural and heritage tourism, nature-based travel, and family travel. Utah is well positioned to attract visitors seeking a higher quality, more unique experience.

⁴ FY03 Utah Advertising Effectiveness Study, NFO Plog Research, August 2003.

Tourism Methodology Overview

Estimating traveler and tourist spending in Utah, and the number of jobs that result from it, is an inexact science. This is because travel and tourism is not an industry in the traditional sense, i.e., an industry classification by which employment, wages, and output are reported and measured. Rather, it is an array of goods and services associated with the activity of travel. In the late 1980s to early 1990s, due to data limitations and timeliness, estimates of the Utah travel and tourism industry were made using proxies such as highway traffic counts, national park visitations, and national traveler surveys. As data has become better and more timely, specifically at the state level, estimates of travel and tourism spending and related employment are no longer primarily based on aggregating secondary data such as visitor counts. These techniques have given way to using employment and wage, and taxable sales and services reports to estimate the size of both the state-level and county-level travel and tourism industry, yielding what are felt to be much more reliable estimates. In addition, 2001 marked the change-over from the old Standard Industry Classification (SIC) to the North American Industrial Classification System (NAICS) for reporting industry employment and wages. This change-over has prompted the recalculation of travel and tourism related employment and spending in Utah, based on NAICS-defined industry location quotients¹ for employment.

Defining the Travel and Tourism Industry

The definition developed by the World Travel and Tourism Council is now the one generally used when assessing the size of the travel and tourism industry. Travel and tourism is defined as the "activities of persons traveling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes." In addition, a distance component, 75 miles from home, is generally added to provide a boundary for "usual environment." While this definition is intended to exclude, for example, commuting to and from work, it does include spending resulting from both business and leisure activities, regardless of the duration of the trip (less than a year). Unfortunately, it also includes activities like "shopping" trips outside one's "usual environment." Also, necessarily, this definition does not distinguish between a non-resident traveler and a Utah resident. The single largest problem when trying to measure travel and tourism, however, is that it is not an industry in the strict sense, but an array of goods and services associated with an activity, and which generally constitute a share of other, defined industries. That is, the share of an industry's output that goes to travel and tourism is difficult to determine directly on the supply side (e.g., employment and wages), since travel and tourism is a demand-side concept.

Moreover, when measuring the impact of travel and tourism, a major concern is to determine the "export" sector of travel and tourism, that is, the new spending that is brought to a country, state, or county from non-resident visitors. From a county perspective, money spent by a tourist

¹ Location Quotient (LQ) is state industry employment as a percent of total state nonfarm employment compared to U.S. industry employment as a percent of total U.S. nonfarm employment.

$$LQ = (Es_i / Es_{Tot}) / (EUS_i / EUS_{Tot})$$

E = Employment

s = State (Utah)

i = Industry (NAICS Code)

% export related = (LQ-1) / LQ Tot = Total Travel and Tourist Related Employment

from another part of Utah is no different than money spent by a visitor from another state. From a state perspective, however, tourism is an export activity only when the spending is by a non-Utah resident. Likewise, international travel is a primary concern for national travel and tourism organizations. For this reason, in the past, the Department of Community and Economic Development and Utah Travel Council used two different sets of data for assessing statewide versus county-based tourism.

Estimating Statewide Travel and Tourism Employment

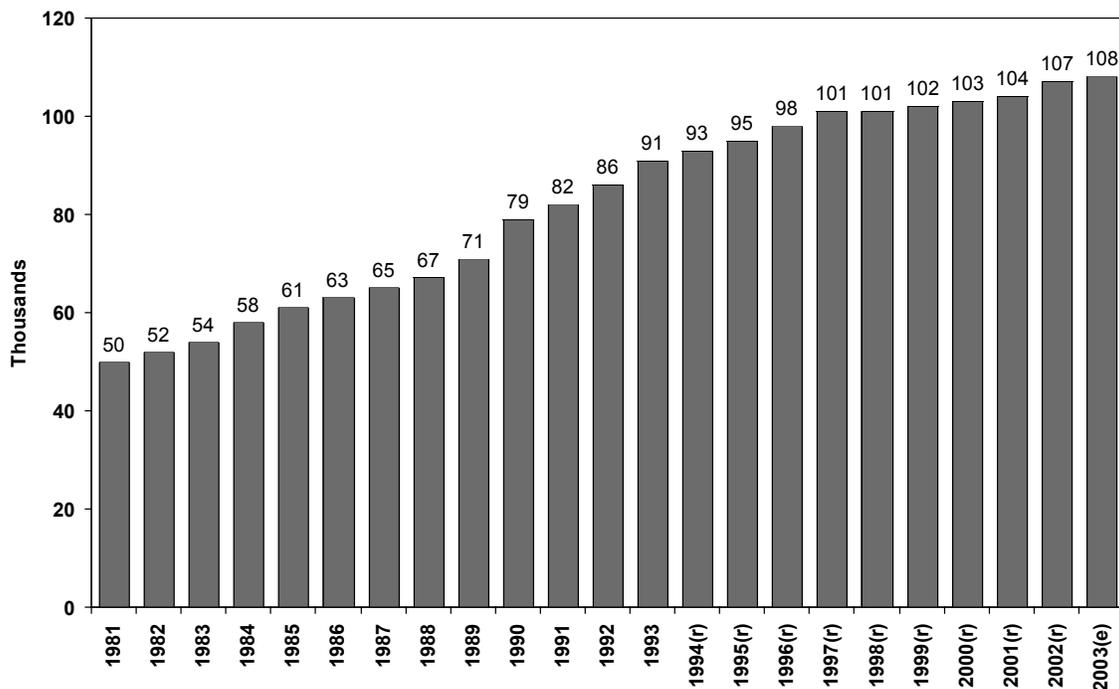
Originally, the statewide estimates of travel and tourism-related employment were simply the aggregated county figures which, as noted, were estimates based on such things as traffic counts on major highways around the state and national park visitation figures. Among the flaws in this approach, however, was that this estimate of travel and tourist related employment did not provide any data to distinguish between Utah residents' in-state travel, and non-resident travelers. Also, it resulted in estimates for some counties that were counter-intuitive. A new model was developed in 1995 based on an analysis of SIC employment data at the four-digit level. A list of 95 SIC defined travel and tourism-affected industries were selected by a workgroup of economists from the Utah Department of Workforce Services, the Department of Community and Economic Development, and the Governor's Office of Planning and Budget. Location quotients (the ratio of employment in each industry compared to the national average) were calculated for the 95 selected industries. Additional adjustments were made for a few industries, such as airlines, that could be considered almost completely tourism and travel dependent. In order to simplify the analysis, the ratio of travel and tourism employment (as defined by the

location quotient) to total nonagricultural employment was combined as a weighted average to 19 broader categories at the two-digit SIC codes. Because significant fluctuations in the location quotients were considered unlikely, these ratios have been used to calculate tourism-related employment in subsequent years. Periodic recalculations were planned for approximately every five years.

However, this consensus was reached before either the full effects of the boom economy in the 1990s or the 2002 Olympic Winter Games were realized. Moreover, 2001 began the conversion from SIC based industry codes to the new NAICS. Consequently, the Department of Community and Economic Development has converted the old travel and tourism SIC codes to the new NAICS coding and updated the location quotients used to determine travel and tourism related employment. Because it now seems that travel and tourism related employment and spending may fluctuate more than previously thought, and because state and national data is available on an increasingly timely basis, the hope is to update the state and county location quotients at least every other year.

In addition to the direct travel related employment figures, statewide indirect and induced tourism employment are calculated based on RIMS II employment multipliers for the included industries. Whereas direct tourism employment represents jobs immediately created by tourism spending, indirect and induced employment represent additional employment that occurs as the initial spending spreads through the economy. Indirect and induced jobs are created as travel industry businesses purchase goods and services from local suppliers or as travel and tourism employees spend their salaries on local goods and services.

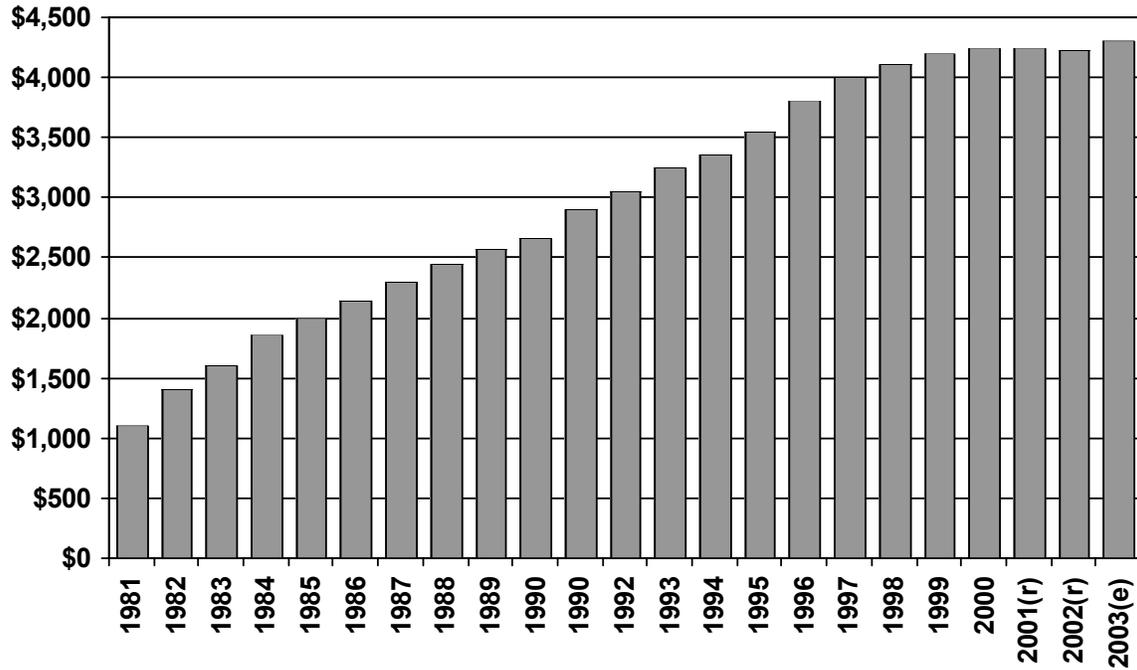
Figure 63
Utah Tourism Indicators -- Travel-Related Employment (Thousands of Jobs)



Source: Utah Department of Community and Economic Development

r = revised
e = estimate

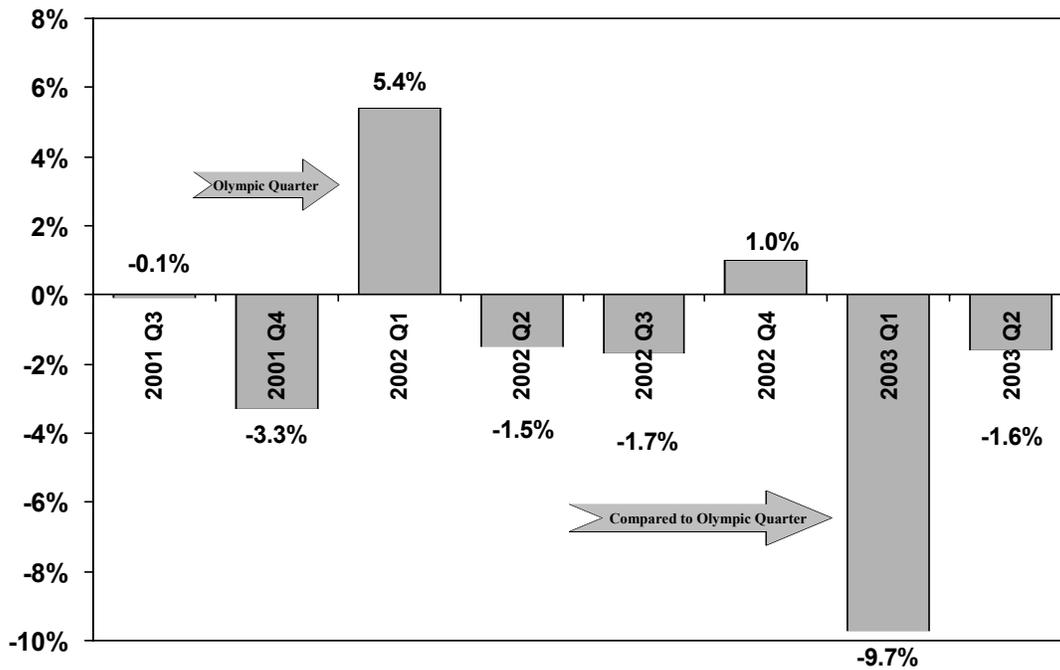
Figure 64
Utah Tourism Indicators -- Traveler Spending (Millions of Current Dollars)



Source: Utah Division of Travel Development

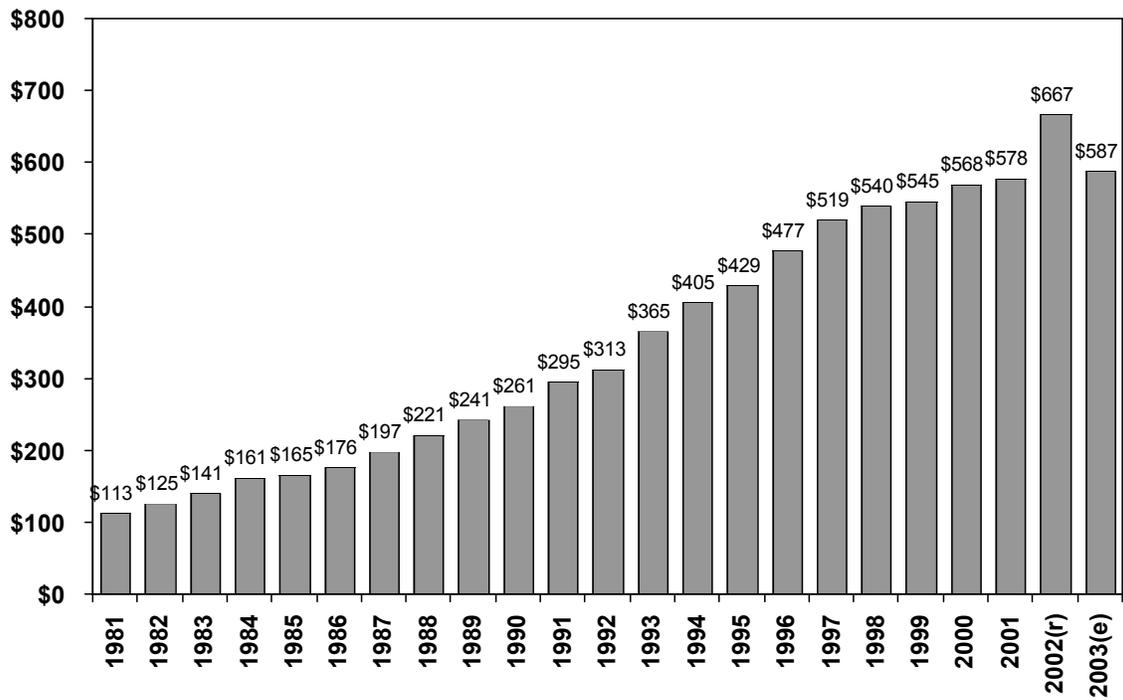
r = revised
 e = estimate

Figure 65
Utah Tourism Indicators -- Tourism Sector Taxable Sales, Percent Change: FY 2002 - FY 2003



Source: Utah State Tax Commission

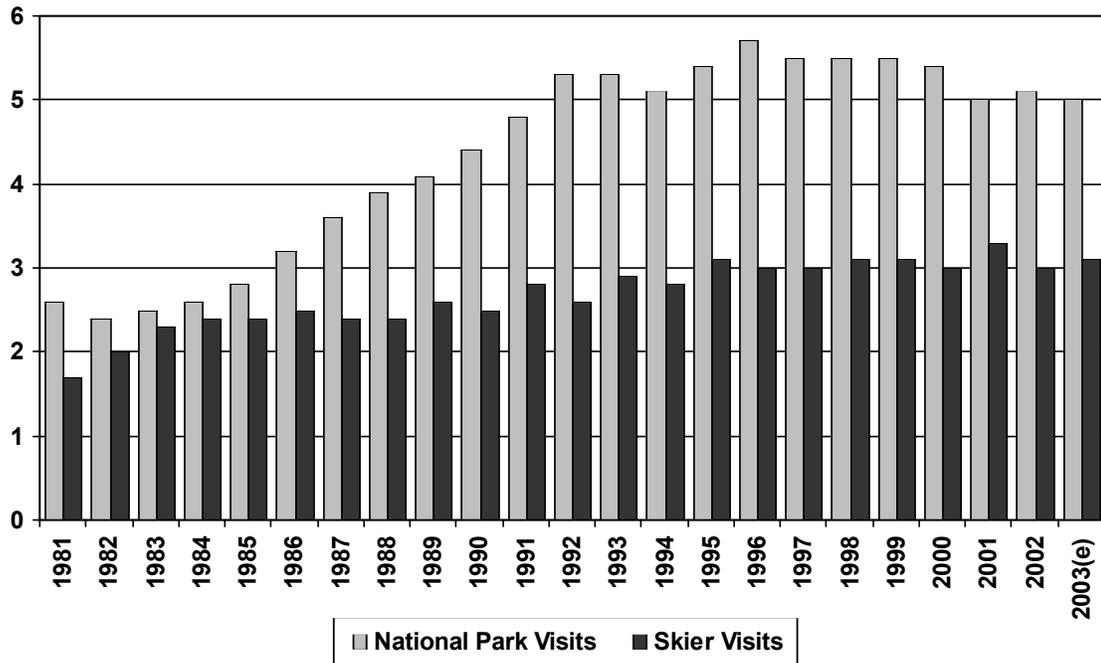
Figure 66
Utah Tourism Indicators -- Hotel Room Rents (Millions of Current Dollars)



Source: Utah State Tax Commission

r = revised
 e = estimate

Figure 67
Utah Tourism Indicators -- National Park and Skier Visits (Millions of Visits)



Sources: National Park Service; Ski Utah

Table 81

Tourism Indicators: Impacts of the 2002 Olympic Winter Games

ECONOMIC INDICATORS	2001 Q3	2001 Q4	2002 Q1	2002 Q2	2002 Q3	2002 Q4	2003 Q1	2003 Q2
Transportation	4%	-17%	-25%	-30%	-36%	-42%	-35%	-22%
Eating & Drinking	1%	-1%	6%	3%	1%	3%	-3%	2%
Auto Rentals	-4%	-1%	-15%	-25%	-11%	-6%	-6%	-2%
Hotels & Lodging	-4%	-7%	31%	6%	2%	6%	-32%	-5%
Amusement & Recreation	1%	-6%	1%	3%	0%	-2%	-1%	-5%
Total Tourism Sector	0%	-3%	5%	-2%	-2%	0%	-10%	-2%

VOLUME INDICATORS	2001 Q3	2001 Q4	2002 Q1	2002 Q2	2002 Q3	2002 Q4	2003 Q1	2003 Q2
Airport Passengers	-9%	-8%	-6%	-5%	-1%	8%	3%	-4%
National Park Visitors	-7%	-9%	30%	12%	1%	14%	-4%	-4%
National Mon. & Rec. Area Visitors	-5%	0%	-6%	-12%	-13%	2%	-11%	-8%
State Park Visitors	-7%	-8%	42%	-11%	-10%	-15%	-51%	-3%
Welcome Center Visitors	-15%	1%	11%	0%	2%	3%	-12%	-3%
Statewide Interstate Traffic	3%	5%	8%	6%	4%	5%	-1%	0%
Statewide Hotel Occupancy Rate	-3%	-2%	4%	2%	0%	3%	-9%	-4%
Utah.com Website Visits	17%	8%	108%	58%	27%	-5%	-40%	-16%

Note: Percent changes are for the same quarter of the previous year.

Source: Utah Division of Travel Development, compiled from reporting agencies.

Table 82
Profile of the Utah Travel Industry

Category	1996(r)	1997(r)	1998(r)	1999(r)	2000(r)	2001(r)	2002(r)	2003(e)	% Change 2002-2003	AAPC
Total Spending by Travelers and Tourists (millions)	\$3,800	\$4,000	\$4,100	\$4,200	\$4,250	\$4,240	\$4,230	\$4,300	1.7%	1.9%
Total Number of Foreign and Domestic Visits (millions)	17.0	17.4	17.8	18.2	17.7	17.3	17.3	17.2	-0.6%	0.2%
Number of U.S. Visits	16.1	16.7	17.2	17.5	17.1	16.7	16.7	16.6	-0.6%	0.4%
Number of Foreign Visits	0.88	0.72	0.64	0.69	0.70	0.60	0.61	0.59	-3.3%	-5.5%
Total Travel and Recreation-Related Employment	98,300	100,800	101,200	102,200	102,900	104,000	106,700	107,500	0.7%	1.3%
Direct Travel and Recreation-Related Employment	67,400	69,100	69,400	70,100	70,600	71,300	73,200	73,700	0.7%	1.3%
Indirect Travel and Recreation-Related Employment	30,900	31,700	31,800	32,100	32,300	32,700	33,500	33,800	0.9%	1.3%
Percent of All Utah Non-Agricultural Jobs	10.3%	10.1%	9.9%	9.7%	9.6%	9.6%	9.9%	10.0%	(x)	(x)
Total Direct State and Local Taxes Generated by Travel Spending (millions)	\$304	\$320	\$328	\$336	\$340	\$336	\$335	\$341	1.8%	1.7%
State Government Portion	\$225	\$237	\$243	\$249	\$252	\$247	\$247	\$251	1.6%	1.6%
Local Government Portion	\$79	\$83	\$85	\$87	\$88	\$89	\$89	\$90	1.1%	1.9%
Total Airline Passengers at Salt Lake International Airport (millions)	21.1	21.1	20.3	19.9	19.9	18.4	18.7	18.7	0.0%	-1.7%
Total Traffic Count at Interstate Borders (millions)	18.0	18.7	19.6	20.7	21.2	21.7	22.9	22.7	-0.9%	3.5%
Total National Park Recreation Visits (millions)	5.7	5.5	5.5	5.5	5.3	4.9	5.1	5.0	-2.0%	-1.9%
Total Skier Visits (millions)	2.9	3.0	3.1	3.1	3.0	3.3	3.0	3.1	3.3%	1.0%
Total State Park Visits (millions)	7.5	7.2	6.9	6.8	6.6	6.1	5.8	4.5	-22.4%	-7.0%
Taxable Room Rents (millions)	\$477	\$519	\$540	\$545	\$568	\$578	\$667	\$587	-12.0%	3.0%
Hotel/Motel Occupancy Rates	73.1%	68.0%	63.8%	61.6%	60.9%	59.9%	62.1%	59.3%	(x)	(x)

r = revised
e = estimate

AAPC = Average Annual Percent Change

Sources: Estimates are based on information gathered from a variety of sources including National Park Service, Utah State Tax Commission, Utah Department of Transportation, Utah Department of Workforce Services, Utah Department of Natural Resources, Salt Lake International Airport, U.S. Department of Commerce, Ski Utah, and the Rocky Mountain Lodging Report

Table 83
Utah Tourism Indicators

Year	Hotel Room Rents (Current \$)	National Park Visits	State Park Visits	Salt Lake Int'l. Airport Passengers	Skier Visits	Stateline Vehicle Crossings	Hotel Occupancy Rate	Travel-Related Employment	Traveler Spending (Millions)
1981	\$113,273,174	2,577,112	6,430,174	4,149,316	1,726,000	na	na	50,000	\$1,100
1982	124,787,207	2,443,787	6,436,488	5,861,477	2,038,544	na	na	52,000	1,400
1983	140,728,877	2,465,294	5,214,498	7,059,964	2,317,255	na	na	54,000	1,600
1984	161,217,797	2,616,301	4,400,103	7,514,113	2,369,901	na	na	58,000	1,850
1985	165,280,248	2,804,693	4,846,637	8,984,780	2,436,544	na	na	60,700	2,000
1986	175,807,344	3,224,694	5,387,791	9,990,986	2,491,191	na	na	62,500	2,150
1987	196,960,612	3,566,069	5,489,539	10,163,883	2,440,668	na	na	64,500	2,300
1988	220,687,694	3,941,791	5,072,123	10,408,233	2,368,985	na	na	67,000	2,450
1989	240,959,095	4,135,399	4,917,615	11,898,847	2,572,154	na	na	71,000	2,570
1990	261,017,079	4,425,086	5,033,776	11,982,276	2,500,134	14,135,400	63.8%	79,000	2,660
1991	295,490,324	4,829,317	5,425,129	12,477,926	2,751,551	14,886,000	69.4%	82,000	2,900
1992	312,895,967	5,280,100	5,908,000	13,870,609	2,560,805	15,510,600	70.3%	86,000	3,050
1993	352,445,691	5,338,707	6,950,063	15,894,404	2,850,000	15,669,500	71.9%	91,000	3,250
1994	378,024,547	5,111,400	6,953,400	17,564,149	2,800,000	16,589,300	73.7%	93,400(r)	3,350
1995	429,189,045	5,381,717	7,070,702	18,460,000	3,113,800	17,301,000	73.5%	94,600(r)	3,550
1996	477,409,577	5,749,110	7,478,764	21,088,482	2,954,690	17,963,500	73.1%	98,300(r)	3,800
1997	519,160,181	5,537,260	7,184,639	21,068,314	3,042,767	18,696,400	68.0%	100,800(r)	4,000
1998	540,424,182	5,466,090	6,943,780	20,297,371	3,101,735	19,590,300	63.8%	101,200(r)	4,100
1999	545,328,875	5,527,478	6,768,016	19,944,556	3,144,328	20,675,000	61.6%	102,200(r)	4,200
2000	567,708,954	5,322,266	6,555,299	19,900,770	2,976,769	21,191,900	60.9%	102,900(r)	4,250
2001	578,445,705	4,946,487	6,075,456	18,367,961	3,278,291	21,721,698	59.9%	104,000(r)	4,240
2002(r)	666,718,674	5,147,950	5,755,782	18,652,758	2,974,574	22,916,391	62.1%	106,700	4,230
2003(e)	586,712,433	4,980,930	4,506,777	18,671,410	3,141,212	22,710,143	59.3%	107,500	4,300
Percent Change									
1981-2003	418.0%	93.3%	-29.9%	350.0%	82.0%	60.7%	-4.5%	115.0%	290.9%
2002-2003	-12.0%	-3.2%	-21.7%	0.1%	5.6%	-0.9%	-2.8%	0.7%	1.7%
Average Annual Rate of Change									
1981-2003	7.8%	3.0%	-1.6%	7.1%	2.8%	4.0%	66.5%	3.5%	6.4%

r = revised
e = estimate

Sources: National Park Service, Utah State Tax Commission, Utah Department of Transportation, Utah Department of Workforce Services, Utah Department of Natural Resources, Salt Lake International Airport, Ski Utah, adapted by Utah Division of Travel Development

Table 84
National Parks' Recreation Visits

Year	Arches	Bryce Canyon	Canyonlands	Capitol Reef	Zions	Total National Parks
1981	326,508	474,092	89,915	397,789	1,288,808	2,577,112
1982	339,415	471,517	97,079	289,486	1,246,290	2,443,787
1983	287,875	472,633	100,022	331,734	1,273,030	2,465,294
1984	345,180	495,104	102,533	296,230	1,377,254	2,616,301
1985	363,464	500,782	116,672	320,503	1,503,272	2,804,693
1986	419,444	578,018	172,987	383,742	1,670,503	3,224,694
1987	468,916	718,342	172,384	428,808	1,777,619	3,566,069
1988	520,455	791,348	212,100	469,556	1,948,332	3,941,791
1989	555,809	808,045	257,411	515,278	1,998,856	4,135,399
1990	620,719	862,659	276,831	562,477	2,102,400	4,425,086
1991	705,882	929,067	339,315	618,056	2,236,997	4,829,317
1992	799,831	1,018,174	395,698	675,837	2,390,626	5,280,166
1993	773,678	1,107,951	434,844	610,707	2,392,580	5,319,760
1994	777,178	1,028,134	429,921	605,324	2,270,871	5,111,428
1995	859,374	994,548	448,769	648,864	2,430,162	5,381,717
1996	856,016	1,269,600	447,527	678,012	2,498,001	5,749,156
1997	858,525	1,174,824	432,697	625,680	2,445,534	5,537,260
1998	837,161	1,166,331	436,524	656,026	2,370,048	5,466,090
1999	869,980	1,081,521	446,160	680,153	2,449,664	5,527,478
2000	786,429	1,099,275	401,558	612,656	2,432,348	5,332,266
2001	754,026	1,068,619	368,592	527,760	2,227,490	4,946,487
2002(r)	769,672	886,436	375,549	523,458	2,592,835	5,147,950
2003(e)	761,206	901,505	392,073	533,927	2,442,451	5,031,162

Percent Change

1981-2003	133.1%	90.2%	336.0%	34.2%	89.5%	95.2%
2002-2003	-1.1%	1.7%	4.4%	2.0%	-5.8%	-2.3%

Average Annual Rate of Change

1981-2003	3.9%	3.0%	6.9%	1.3%	2.9%	3.1%
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r = revised

e = estimate

Source: National Park Service

Table 85
Travel and Tourist Related NAICS Codes

Retail Trade:

- 441 Motor Vehicle and Parts Dealers - location quotient employment
- 442 Furniture and Home Furnishings Stores - location quotient employment
- 443 Electronics and Appliance Stores - location quotient employment
- 444 Building Material, Garden Equipment and Supplies - location quotient employment
- 445 Food and Beverage Stores - location quotient employment
- 446 Health and Personal Care Stores - location quotient employment
- 447 Gasoline Stations - location quotient employment
- 448 Clothing and Clothing Accessories Stores - location quotient employment
- 451 Sporting Goods, Hobby, Book, and Music Stores - location quotient employment
- 452 General Merchandise Stores - location quotient employment
- 453 Miscellaneous Store Retailers - location quotient employment

Transportation and Warehousing:

- 481 Air Transportation - all employment
- 482 Rail Transportation - location quotient employment
- 483 Water Transportation - location quotient employment
- 485 Transit and Ground Passenger Transportation - location quotient employment
- 487 Scenic and Sightseeing Transportation - location quotient employment
- 488 Support Activities for Transportation - location quotient employment

Real Estate and Rental and Leasing:

- 531 Real Estate - location quotient employment
- 532 Rental and Leasing Services - location quotient employment

Administrative, Support, Waste Management and Remediation Services:

- 561 Administrative and Support Services - all travel agencies, tour operators, convention bureaus

Health Care and Social Assistance:

- 621 Ambulatory Health Care Services - location quotient employment

Arts, Entertainment, and Recreation:

- 711 Performing Arts and Spectator Sports - location quotient employment
- 712 Museums, Historical Sites, and Similar Institutions - all employment
- 713 Amusement, Gambling, and Recreation Industries - location quotient employment

Accommodation and Food Services:

- 721 Accommodation - location quotient employment
- 722 Food Services and Drinking Places - higher of location quotient or 25% of total employment

Other Services (except Public Administration):

- 811 Repair and Maintenance - location quotient employment
- 812 Personal and Laundry Services - location quotient employment

Public Administration:

- 922 Justice, Public Order, and Safety Activities - location quotient employment
- 924 Administration of Environmental Quality Programs - location quotient employment