

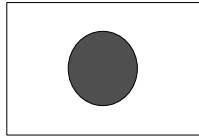
International Visitors To Washington State 1991-1995



Canada



United Kingdom



Japan



West Germany

January 1997



**WASHINGTON STATE
COMMUNITY, TRADE AND
ECONOMIC DEVELOPMENT**

Building Foundations for the Future

Tim Douglas, Director

International Visitors To Washington State 1991-1995

Prepared by

Dean Runyan Associates
815 SW Second Avenue, Suite 620
Portland, Oregon 97204
(503) 226-2973

Prepared for

Washington State Department of Community
Trade and Economic Development
Washington State Tourism Division
(360) 753-5601

January 1997



The Place You've Been Trying To Get To.™

Robin Pollard, Director
Washington State Tourism Division

101 General Administration Building
PO Box 42500
Olympia, Washington 98504-2500

INTERNATIONAL VISITORS TO WASHINGTON STATE

TOTAL INTERNATIONAL ARRIVALS

Approximately 12.5 million international travelers visited Washington State during 1995. Canadians accounted for the majority of international travelers with over 11.9 million visitors. Visitors from Canada staying one or more nights in Washington totaled nearly 1.9 million arrivals, while same day visitors totaled 10.1 million. Overseas travelers visiting Washington totaled 599,000.

International Visitors to Washington State 1991-1995

	1995	1994	1993	1992	1991
<i># of Visitors (000)</i>					
Canada	11,935	12,043	14,290	16,532	18,141
Overnight Visitors	1,856	1,849	2,134	2,321	2,670
Same Day Visitors	10,079	10,194	12,157	14,210	15,471
Overseas	599	443	392	409	501
Total Foreign Visitors	12,533	12,486	14,682	16,941	18,642

Note: details may not add to totals due to rounding.

Sources: Office of Tourism Industries, International Trade Administration; US Travel Data Center, Travel Industry Association; and Statistics Canada.

In aggregate, the volume of international visitors has been falling steadily over the past 5 years. However, this decrease has been driven mainly by the decline in Canadian visitation. Visitation from overseas countries, on the other hand, has been on the rise for the past couple of years. The volume of overseas visitors to the state of Washington spiked in 1995, reaching 599,000 visitors and surpassing 1991 levels.

WASHINGTON'S MARKET SHARE

In addition to understanding the total volume of visitation to Washington, it is also important to understand the state's competitive position in regard to other destination states. This competitive position can be viewed in terms of Washington's market share, which is determined by comparing international visitors to Washington State as a percentage of total international visitors to the United States.

CANADIAN MARKET

According to the U.S. Department of Commerce's Office of Tourism Industries (formerly the United States Travel and Tourism Administration), Washington State recorded 1.9 million Canadian overnight visitors, representing 12.7% of total Canadian overnight visits to the United States in 1995. Washington State surpassed Florida, which had 1.7 million Canadian overnight visitors, to rank second in the nation. Washington also passed Michigan (1.4 million), California(827,000), Maine (797,000) and Vermont (786,000) as a leading destination for Canadians staying one or more nights in the United States.

Washington was also an important destination for Canadians visiting for the day only, garnering over one-fourth (26.9%) of all Canadian day visitors to the United States.

Washington's Share of the International Visitor Market, 1995

	WA	U.S.	Market Share
<i># of Visitors (000)</i>			
Canada	11,935	52,154	22.9%
Overnight Visitors	1,856	14,663	12.7%
Same Day Visitors	10,079	37,491	26.9%
Overseas	599	20,639	2.9%
Total Foreign Visitors	12,533	72,792	17.2%

Note: details may not add to totals due to rounding.

Sources: Office of Tourism Industries, International Trade Administration; US Travel Data Center, Travel Industry Association; and Statistics Canada.

OVERSEAS MARKET

Washington ranked 11th in the volume of visitors from overseas countries with 599,000 visitors in 1995. This level of visitation is comparable to that reached by Georgia, New Jersey and Pennsylvania and is greater than that reached in Colorado, Louisiana, Michigan and Utah. Overseas visitors to Washington State increased 35% in the last year, one of the largest gains experienced in any of the 50 states or the District of Columbia during 1995.

INTERNATIONAL TRAVELER SPENDING

International traveler spending is estimated to have reached \$1.2 billion in 1995. The largest share of spending by international visitors in Washington State comes from overseas visitors. These visitors spent an estimated \$806 million in Washington during 1995, or approximately \$171 per visitor per day. Visitors from overseas countries spent an average of 7.9 days in Washington State and spent an average of \$1,347 per trip in 1995.

Travel Spending by International Visitors in Washington State, 1994 and 1995 estimates

	International Traveler Spending (\$ Million)		Avg. Visitor Spending in Washington State (\$ per visitor)	
	1995p	1994	per day	per trip
Canada	404.7	404.8		
Overnight Visitors	197.6	194.1	\$39	\$106
Same Day Visitors	207.1	210.7	\$21	\$21
Overseas	806.1	592.7	\$171	\$1,347
Total Foreign Visitors	\$1,210.8	\$997.5		

p = preliminary

Sources: Dean Runyan Associates; Office of Tourism Industries, International Trade Administration; US Travel Data Center, Travel Industry Association; and Statistics Canada.

Same day travel by Canadian visitors to the State of Washington totaled nearly 10.1 million visits in 1995, over five times as large a market as Canadian overnight visitors. Although the volume of visitation is much greater for same day visitors from Canada, their per capita spending is much less. Day visitors spent on average \$21 per day, while overnight visitors spent an average of \$39 per day. Since Canadian overnight visitors stayed an average of 2.7 nights in the State of Washington, the average trip spending for overnight visitors equates to \$106 per trip. Travel spending associated with day visitors from Canada totaled \$207.1 million, while overnight visitors spent \$197.6 million in Washington during 1995.

It should be noted that the 1995 estimates are preliminary and subject to change. Statistics Canada was able to supply 1995 spending estimates for Canadian travel to Washington State, but the total overseas visitor spending data was not yet available from the Office of Tourism Industries and the U.S. Travel Data Center.

Dean Runyan Associates, therefore, made estimates based on the 1995 overseas arrivals figures and spending estimates derived from the Office of Tourism Industries' 1995 *In-Flight Survey of International Air Travelers*. These estimates are subject to revision when final expenditure figures are released from the Office of Tourism Industries and the U.S. Travel Data Center.

TOP OVERSEAS MARKETS

Estimates of overseas visitation were obtained from the Office of Tourism Industries' *In-Flight Survey of International Air Travelers* and represent travel by overseas residents to the United States via scheduled international air carriers. All overseas travelers to the United States staying for one night or longer are reported in these estimates.

During 1995, a total of 598,500 residents from overseas countries visited Washington State. This represents an increase of 35% from the 443,000 overseas visitors the prior year and compares to an increase in total overseas visitors to the United States of 11.8%.

The majority of Washington State's overseas visitors originate from two regions: Europe and the Far East. Approximately 288,000 visitors arrived from Europe, accounting for approximately half of all overseas arrivals to Washington in 1995. Overseas visitors from the Far East (Japan, Korea, China, Taiwan, Hong Kong and the Philippines) accounted for 39% of all overseas visitors, or 231,600 visitors to Washington State. In terms of countries, Japan represented the largest share (20.7%) of Washington's overseas visitor arrivals with 124,100 visitors. Other key overseas markets for Washington are the United Kingdom with 63,500 visitors and Germany with 57,300 visitors during 1995.

The table on the following page (Overseas Travelers to Washington State: 1991-1995) shows the number of overseas visitors to Washington State by country of origin. The main purpose of providing these country estimates is to look at the major markets and their relative sizes over time. The annual numbers should not be used as absolute levels of visitation or absolute indicators of increases or decreases from year-to-year.

For instance, the United Kingdom and Germany are the major markets in Western Europe. The number of German visitors to Washington State has fluctuated from 46,000 visitors in 1991 to 31,000 in 1993 and to 57,000 in 1995. The relative size of this market is approximately 50,000. It also appears that the German market has been growing over the five-year time period covering 1991-1995. However, the large year-to-year increases and decreases may be reflecting fluctuations in sample sizes, participating airlines and other factors, not necessarily absolute travel trends in those years. These fluctuations will tend to even out over the years and over a longer period of time, trends can actually be determined.

The country estimates provided below should be used to determine the relative size of overseas markets and to determine trends over the five-year time period. They should not be used to determine the absolute size of each market or the absolute rate of change at any one point in time.

Overseas Travelers to Washington State: 1991-1995

Area and Country of Residence	1995	1994	1993	1992	1991
Western Europe	280,200	220,200	176,300	201,000	236,000
Benelux*	23,400	17,900	9,300	8,000	3,000
France*	18,400	25,500	11,800	6,000	15,000
Germany	57,300	47,100	31,100	49,000	46,000
Italy*	13,700	12,100	8,300	4,000	8,000
Spain*	0	1,900	0	14,000	7,000
Sweden*	32,900	14,500	13,200	25,000	21,000
Switzerland*	10,700	6,600	23,900	7,000	8,000
United Kingdom	63,500	72,100	51,000	54,000	75,000
Eastern Europe*	7,800	9,400	1,600	2,000	NA
Middle East*	10,000	13,300	23,900	9,000	17,000
Oceania	0	0	0	26,000	28,000
Australia	28,000	21,200	21,100	18,000	19,000
New Zealand*	0	7,000	5,400	7,000	8,000
South America*	12,200	10,600	10,100	16,000	19,000
Argentina*	3,400	800	1,500	2,000	2,000
Brazil*	4,200	2,600	5,600	5,000	8,000
Columbia*	2,000	700	900	1,000	4,000
Central America*	3,100	1,500	2,700	1,000	11,000
Caribbean*	0	8,200	1,100	4,000	12,000
Africa*	3,200	3,800	3,500	12,000	13,000
Far East	231,600	144,300	139,500	127,000	147,000
Hong Kong*	14,300	10,700	12,900	11,000	25,000
Japan	124,100	79,900	77,900	69,000	80,000
South Korea*	40,300	16,900	7,800	7,000	10,000
Philippines*	4,300	3,100	6,800	3,000	3,000
P.R. of China*	9,700	11,700	6,800	4,000	7,000
Rep. of China (Taiwan)*	21,100	11,800	12,300	22,000	10,000
Total Overseas Visitors	598,500	443,000	391,900	409,000	501,000

* Estimates should be used with extreme caution; small sample sizes can cause wide fluctuations.

NA = Not Available

Source: Compiled by Dean Runyan Associates from data provided by the Office of Tourism Industries, International Trade Administration, and Statistics Canada.

METHODOLOGY

The estimates used in this report were drawn from one main source, the International Trade Administration, Office of Tourism Industries and supplemented with additional information on Canadian travelers from Statistics Canada.

OVERSEAS TRAVEL

The International Trade Administration, Office of Tourism Industries (formerly the United States Travel and Tourism Administration) collects market research information on international travel to and from the United States. In particular they conduct a comprehensive survey of overseas visitors to the United States via scheduled international air carriers. This survey is entitled the *Survey of International Air Travelers*. The survey information is collected from passengers through questionnaires covering information on the traveler, the air trip, activities and places visited and air travel expenditures. Survey results are expanded to represent all international air travelers to the United States.

The survey is conducted voluntarily by selected major airlines on a sample of their international flights departing from U.S. airports. Data are collected monthly through in-flight passenger surveys conducted on a sample of the participating airline's scheduled international flights that depart from the United States. Airline cabin personnel distribute the self-administered questionnaires to all adult passengers and collect completed forms prior to debarkation. The survey questionnaire is available in English, French, German, Italian, Japanese, Spanish, Korean and Chinese. Passengers on charter flights and persons traveling by air between the U.S. and Canada are excluded. The *Survey of International Air Travelers* also collects information on Mexicans visiting the United States by air.

Since airline participation is voluntary and changes from quarter to quarter, country level data should be viewed cautiously. For example, if a major carrier for a particular country was unable to participate for a quarter, the data for that country may not fully represent the country's international travel.

With the exception of the number of respondents, all the data presented in the survey tables are statistical estimates, based on responses to the survey and supplemented with data from the Immigration and Naturalization Service (INS). Estimates are therefore subject to a certain amount of error resulting from sampling, data collection and estimation processes. Because of the complicated nature of the sample design and the resulting computational burden, sampling variability has not been calculated for the estimates.

Instead, an indication of the reliability of a set of related estimates is given by the number of respondents to the relevant questionnaire items. The reader must exercise judgment in determining the amount of confidence to place in an estimate and in its proper use. For example, an estimate based on 500 respondents is more reliable than an estimate based on 100 respondents.

CANADIAN VISITATION

Data on Canadian travel to the United States are obtained through Statistics Canada's *International Travel Survey of Canadian Residents*. This survey details Canadian travel to the United States in total and by individual states visited in the United States. In addition, data on market size (person visits, person nights, traveler expenditures), traveler demographics (age, income, province of residence) and trip characteristics (purpose of trip, mode of transportation, length of stay) is supplied. All Canadian travelers to the United States staying one night or longer are reported in these estimates.

In addition to looking at the visitation reported for Canadians staying one or more nights in the United States and Washington, we also investigated the patterns in same day travel between the two countries. This data is not typically reported and required a special run from the Statistics Canada database to provide it for this analysis.