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The Role of Recreation and Leisure Travel in Idaho's Economy

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Executive Summary

Research examining the importance of recreation and leisure travel in the Idaho economy in 1987 found that leisure travel ranked fourth among the state's natural-resource-based industries in terms of the proportion of Idaho's income produced. Agriculture ranked first, with food processing and timber (including wood processing) ranking second and third.

However, the research also revealed that, while agriculture and timber are currently the mainstays of the Idaho economy, they have remained flat in recent years. In recent decades, agriculture, mining and timber have experienced no real growth, while other sectors of Idaho's economy are expanding (Bureau of Economic Analysis 1990). While these traditional industries will certainly continue to play a major role in the state's economy (particularly in certain communities), the relative importance of other industries, including leisure travel, will continue to increase as the Idaho economy diversifies.

This trend will be especially significant in regions of Idaho dependent on traditional industries, which are impacted by price and supply/demand volatility. For example, employment in the state's timber industry, which has been an especially important industry in the north and central regions of Idaho, has been cyclical over the last decade, with a ten-year high of 15,095 jobs in 1981 and a ten-year low of 12,159 jobs in 1982 (Idaho Division of Financial Management & Economic Analysis Bureau 1990). Further, employment in that sector in 1990 was 14,898 jobs, or 7 percent above the average of 13,909 jobs per year during the decade. Employment in the mining and agricultural sectors also has remained flat over the last decade: employment in mining in 1990, for example, was about 5 percent above the average number of jobs per year during the decade.

In contrast, total employment in the service sectors of the economy has grown fairly steadily from 258,317 jobs in 1981 to 304,407 jobs in 1990: this change represents an increase of 18 percent over the decade, with the number of jobs in services in 1990 about 12 percent higher than the average number of jobs per year during the decade. (Service industries include retail trade, finance, insurance and real estate, state and local government, and "services," which include health-care, legal, business, social and educational services.)

The service sector, which includes the tourism industry, is now the predominant component of the U.S. economy. According to statistics gathered by Rasker (1991), 71 percent of the U.S. work force was employed in the service sector in 1986 (Quinn and Gagnon 1986), and by 1990 that sector produced 68 percent of real Gross National Product and accounted for 76 percent of all employment in the nation (Sinai 1990). The importance of the service economy becomes even more pronounced when one considers that 91 percent of the increase in the nation's employment since the 1982 recession was in service industries (Reich 1990). The Bureau of Labor Statistics (1985) predicted that this trend of service industries providing most of the new jobs would continue through 1995.

By all indications, tourism has been a part of the growth in Idaho's service economy. The tourism infrastructure and industry have expanded significantly since 1987, resulting in a 49-percent increase statewide just in lodging receipts between 1987 and 1991. Significantly, because a major part of that growth has occurred in northern Idaho, it can help offset the economic impacts of reduced timber harvests forecast for that region.

For example, a decline in Idaho's timber supply is expected in the coming year that will accelerate the decreasing relative importance of that industry in the Idaho economy. Recent estimates suggest a 25-percent reduction in tree harvesting next year in northern Idaho, where timber ranked as the region's leading industry in 1987. In contrast, based on lodging receipts, the travel industry has grown about 64 percent in the region between 1987 and 1991. A rough-and-ready evaluation of these changes suggests that, all else remaining the same, the gross regional product of northern Idaho would remain nearly the same, but timber's contribution to the region's economy would drop by 11.1 percent, from 44.5 percent to 33.4 percent, while the share contributed by recreation-based travel would increase 4.3 percent, from 6.7 percent to 11 percent.

Our research emphasizes that the importance of these changes doesn't stem simply from their primary economic impacts. No one seriously proposes that loggers are going to become busboys and tour guides. The important point is that secondary industries benefit when the businesses that the timber or recreation industries buy their goods and services from, like stores, gas stations and other local businesses, benefit when a growing industry helps replace the dollars generated by another that is

in decline. Further, the purchases of those businesses and their employees from still other businesses have a rippling effect throughout the region's economy that helps support it.

The research also indicates that income from leisure travel is generated throughout the state, extending its benefits to all regions -- both geographically and throughout the various sectors of the Idaho economy. These findings support the idea that developing Idaho's tourism infrastructure will have benefits throughout the state. The fact that tourism represents one of the state's greatest opportunities for future economic development assumes added importance with the recognition that, to date, this tourism development has occurred primarily in certain communities, such as Boise, Coeur d'Alene, Sandpoint, and Sun Valley.

This situation has two major implications. One is that the economic benefits of tourism are being realized by particular communities, for whom the industry is critical from the perspective of the local economy. A second implication is that efforts to expand tourism industry in other communities in Idaho can spread these benefits and help diversify and strengthen their and, ultimately, the state's economy.

Two additional facts often are overlooked by analysts. First, many of the state's tourism businesses are not publicly owned corporations, as are many firms in other industries. Much of the income attributed to those publicly owned firms may flow out of the state as corporate profits and payments to shareholders, while tourism enterprises are predominantly small-scale businesses whose income is likely to be proprietary income that remains within the state.

Second, the Idaho tourism industry also includes a great deal of business and convention travel, which was not examined in the present study. We estimate that when this component is added to the recreation and leisure travel component, Idaho's tourism industry may be almost twice the size of that portion identified in this study.

Introduction

Recreation and other leisure travel spending appear to be increasingly significant contributors to Idaho's economic health. This is especially true in particular communities and subregions in the state, such as Sandpoint, Coeur d'Alene, McCall, Sun Valley, and travel corridors such as those in southeastern Idaho that access the Yellowstone-Teton complex.

This study considers spending by recreation and leisure travelers in Idaho and the contribution of this spending to the state through economic diversification and rural economic development. We first present the framework for our analysis, including Idaho's economic base, spatial features of the Idaho economy, and the economic role of recreation and leisure travel in Idaho. The discussion of that role requires an understanding of the importance of both basic and service industries in Idaho's amenity economy. That economy includes the spending by "traditional tourists" (out-of-region visitors traveling for recreation or pleasure), convention travelers, and residents from particular Idaho regions active in leisure and recreation pursuits within those regions, as well as retirees, the independently wealthy and residents who are "footloose," or location-independent in their occupations. Finally, that economy also includes interstate trade generated by amenity resources in Idaho's economy.

We then focus on our assessment of the extent to which expenditures by traditional tourists, in-region leisure travelers and convention travelers contribute to the Idaho economy, describing the results of a study conducted to collect these expenditure data and their use in three models of Idaho's regional economies. The report concludes with a discussion of the major conclusions that can be drawn from our research.

Framework for Analysis

■Idaho's Economic Base

Historically, the economic base of Idaho has been agriculture, timber and mining. However, this economic base has expanded in recent years to include a diversity of new industries or income sources, including medium and high-tech manufacturing, food products manufacturing, the federal government, and services such as tourism. For this research, tourism was defined as recreation and leisure travel, and did not include business, convention and meeting travel.

Like other components of the economic base, tourism brings outside monies to a region (say, the state of Idaho) when out-of-state visitors spend part of their money in the state. These monies enrich the state as they are re-spent in resident-serving, non-export industries, much as monies brought in through agricultural crops or timber sales.

However, tourism differs from other export, or outside-income earning, industries. Unlike the timber or mining industries, the tourism industry is not associated with a particular business or line of industrial activity. Instead, the tourism industry represents part of the business activity of numerous diverse businesses: specifically, that portion deriving income from visitors from outside the region. The tourism industry includes not only a significant share of hotel-motel and restaurant trade, but also a wide array of retailing, including the sale of gasoline, apparel, recreation equipment, and other goods and services. The industry also includes a host of service

activities--boat, recreational vehicle and auto rental; campgrounds; touring; and outfitting and guiding. To the extent that tourists purchase items manufactured in Idaho, a portion of manufacturing is also part of the tourism industry.

An important point is that, in modeling Idaho's recreation and leisure travel economy, we are really measuring a part of Idaho's larger "amenity economy." Components of this amenity economy include those groups drawn to the state by Idaho's amenities and making a contribution to its economy. We discuss the various dimensions of Idaho's amenity economy below. But first it is useful to introduce the role of the spatial features of Idaho's economy, which are critical for accurate economic modeling in general and for modeling the state's tourism economy in particular.

■Spatial Features of the Idaho Economy

It is sometimes said that Idaho really has three capitals, only one of which is located in Idaho (see Figure 1). This perception reflects a fundamental feature of Idaho's economy. Idaho is economically comprised of three regions: one region centered on Spokane, Washington, in the north; a second region centered on Boise in the southwest; and a third region centered on Salt Lake City, Utah, in the southeast. Trade relationships in northern Idaho, which extends from roughly the Salmon River Gorge north, are dominated by the urban center of Spokane. The region of southwestern Idaho, including Twin Falls, is trade-dominated by the urban center of Salt Lake City. Boise trade dominates all of southwestern Idaho as well as a large part of southeastern Oregon. The importance of Idaho's three-region structure is that in modeling the Idaho economy, at least three models are necessary to correctly capture the trade flows and their impacts on that economy.

■The Role of Service Industries in Idaho's Amenity Economy

As discussed above, regional economic analysis typically focuses on those industries comprising a region's economic base, where basic industries are those bringing out-of-region dollars into the region.

Research by ourselves and others (Robison et al. 1991) found that, in 1987, recreation and leisure travel ranked fourth among the state's natural-resource-based industries in terms of the proportion of Idaho's income produced. Agriculture ranked first, with food processing and timber (including wood processing) ranking second and third. As export dollars from these industries are spent and re-spent by businesses and households in the region, they further stimulate the region's economy.

However, in the past, economic-base theory has viewed only the traditional export-earning sectors of the economy, including agriculture, timber, mining, and manufacturing and processing, as basic industries and the major determinants of a region's growth (North 1955). Further, a common interpretation of traditional economic-base theory is that service industries expand to support the growth in basic industries, and so services will also decline when basic industries do.

Service industries are defined here to include retail trade, finance, insurance and real estate, state and local government, and "services" (SIC Codes 70 through 89), which include health-care, legal, business, and social and educational services. However, some researchers have defined the service economy even more broadly in the literal sense of "goods and services" to include "all output that does not come from the four goods-producing sectors: agriculture, mining, manufacturing and construction" (Ginzberg and Vojta 1981, p. 48).

In the U.S., this service sector is the predominant component of the nation's economy. According to statistics gathered by Rasker (1991), 71 percent of the U.S. work force was employed in the service sector in 1986 (Quinn and Gagnon 1986), and by 1990 that sector produced 68 percent of real Gross National Product and accounted for 76 percent of all employment in the nation (Sinai 1990). The importance of the service economy becomes even more pronounced when one considers that 91 percent of the increase in the nation's employment since the 1982 recession was in service industries (Reich 1990). The Bureau of Labor Statistics (1985) predicted that this trend of service industries providing most of the new jobs would continue through 1995.

Some economists argue that economic-base theory, as it is commonly interpreted, overlooks the importance of services as basic industries (Boyers et al. 1985, Goe and Shannon 1990, Rasker 1991). They note that, although the products of service industries are intangible, they bring outside dollars into a region's economy and are therefore part of its economic base. In addition, local services play an important role in a region's economy through import substitution (that is, the consumption of locally produced goods and services instead of those that would otherwise have to be produced outside the region and imported into it). Powers (1988) argues that businesses providing these local services diversify the economy and keep the region's dollars from leaking out; in so doing, they protect the regional economy from the influences of external economic forces.

In Idaho, developing service industries represent a major contributor to growth in the state's economy. In the last two decades, growth in agriculture, mining and timber has been flat, while other sectors of Idaho's economy are expanding (Bureau of Economic Analysis 1990). While these

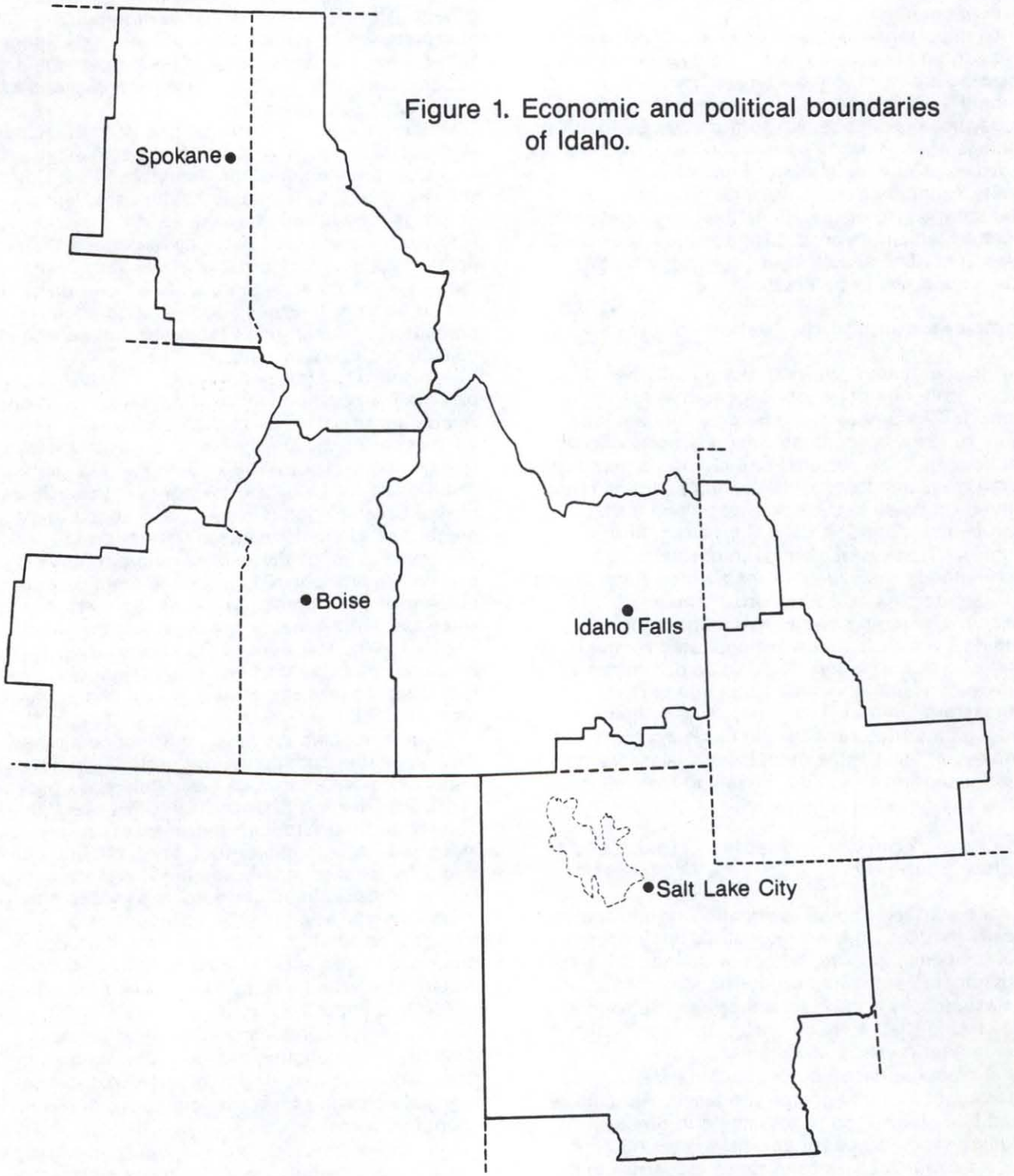


Figure 1. Economic and political boundaries of Idaho.

traditional industries continue to play a major role in the state's economy -- particularly in certain communities -- the relative importance of other industries will continue to increase as the Idaho economy diversifies.

This trend is especially important in regions of the state dependent on traditional industries, which are impacted by price and supply-demand volatility: North Idaho is particularly dependent on timber, and this industry, as well as agriculture, is of major importance in central Idaho; southern Idaho also has traditionally been dependent on agriculture. For example, employment in the logging and wood products industries, which have been especially important in the north and central regions of Idaho, has been cyclical over the last decade, with a ten-year high of 15,095 in 1981 and a ten-year low of 12,159 in 1982 (Idaho Division of Financial Management & Economic Analysis Bureau 1990); further, employment in that sector in 1990 was 14,898 jobs, or 7 percent above the average of 13,909 jobs per year during the decade. Similarly, employment in the mining and agricultural sectors has remained flat over the last decade. For example, employment in mining in 1990 was about 5 percent above the average number of jobs per year during the decade.

In contrast, total employment in the service sectors of the economy has grown fairly steadily from 258,317 jobs in 1981 to 304,407 jobs in 1990. This change represents an increase of 18 percent over the decade, with the number of jobs in services in 1990 about 12 percent higher than the average number of jobs per year during the decade.

The relative importance of service industries also can be expected to increase in regions of the state having easy access to amenity resources. As one example, Rasker (1991) found that in counties in the Yellowstone area, major areas of economic growth were in local service sectors. He reports that from 1969 to 1988, about 77 percent of all new jobs in the Yellowstone region and 69 percent of all increases in personal income were attributable to service industries (Bureau of Economic Analysis 1990). In contrast, the numbers of jobs and dollars of income provided in 1988 by extractive industries were half as large as the proportions of jobs and income recorded for 1969.

This trend away from employment in traditional, extractive industries is not unique to the Yellowstone region, but reflects two national trends: (1) increased efficiencies in production technology and automation that has reduced demand for manual labor; and (2) the relative saturation of markets for the products of these industries, coupled with the proliferation of businesses producing those products. In contrast, markets for service products continue to expand. In sum, these trends suggest that Idaho's service economy represents a vital component of the state's growing amenity economy.

■A Taxonomy for Analyzing the Components of an Amenity Economy

Components of Idaho's amenity economy include those groups that are drawn to the state by Idaho's amenities and make a contribution to its economy. They include retired persons as well as leisure-seeking residents of the state as well as traditional tourists and in-region travelers. Interstate trade generated by amenity resources in other states also plays a role in Idaho's amenity economy.

Retired, Leisurely, and Footloose Residents. One element of the amenity economy is a growing group of residents that includes retirees, the independently-wealthy, and residents who are "footloose" (i.e., location-independent in their occupations). Like the traditional tourist, persons classified as members of this group are drawn to a region or state by its amenities and natural attractions. And, like the traditional tourist, they bring monies to the area from outside. We consider the members of this group one at a time.

One important trend is that of retired persons seeking out amenity-rich places like Idaho to spend their retirement years (Salazar et al. 1986). This group is not actively involved in the local economy as producers, but they do consume, and the income and employment their spending generates can be an important part of a region's economic base. Individuals over 65 years of age comprised 11.8 percent of Idaho's population in 1988 (Idaho Dept. of Health and Welfare 1989), and the state is actively trying to attract more of this group to Idaho. Our 1987 survey data suggest that retired individuals also are an important group of travelers in the state (Harris et al. 1987): 22.3 percent of all trips taken in 1987 for the purpose of recreation and leisure travel in Idaho were taken by retirees who reside in the state -- almost double their proportion of the Idaho population and a reflection of their greater discretionary time and, in some cases, income. Significantly, retirees (both resident and nonresident) account for 31.6 percent of all trips taken in 1987 by nonresidents for the purpose of recreation and leisure travel in Idaho.

The other two groups contributing to Idaho's amenity economy are the independently wealthy and footloose. By "independently wealthy" persons, we mean the fortunate few who can afford a second home in some amenity-rich place like Idaho and take up residence in the state independent of the need to support themselves from funds earned in Idaho.

Finally, there are those whom we have called the "footloose." These are the members of a growing class of location-independent entrepreneurs who, because of advances in telecommunications and computer technology, are able to set up their business operations just about anywhere they choose. They work out of their homes and transmit

the products of this work via modem, fax or mail to their home offices or clients located far distant. Futurists tell us this group is growing, and their locational decision is based not on the familiar criteria of raw materials location, transportation or market, but on the amenities of an area (Toffler 1991). The importance of these groups as a part of what we have been describing as the amenity economy has been documented by Rudzitis and Johansen (1991), who conducted a national survey of 2670 residents of counties containing federally designated wilderness. Their findings included that the presence of wilderness was an important reason for 53 percent of these residents choosing to move to or live in the area, while 81 percent felt wilderness areas were important to their counties.

The Traditional Tourist. We all have a picture of the traditional tourist: folks dressed in brightly colored outfits and draped with photo bags, with loads of luggage stacked on top of their vehicles. Whatever their appearance, the traditional tourist is a resident of some other region or state who is traveling to or through the region for recreation and leisure. The role of nonresident tourists as contributors to the economic base is easiest to imagine. The monies they spend in-region are monies generated outside the region. Those monies are outside income and thus clear elements of the regional economic base.

As discussed above, we have divided Idaho into three sub-regions for reasons having to do with spatial structure and the economic relationship of those regions in terms of flows of goods, services and dollars. For the purposes of portraying the economic base of each of these regions, traditional tourists in any particular region of Idaho include not only out-of-state visitors, but visitors from other regions of Idaho itself. Our purpose in classifying tourists and leisure travelers, it must be recalled, is to determine their role in the regional economic base. For example, a resident of southwestern Idaho who travels to northern Idaho on vacation contributes to the economic base in northern Idaho through his spending there. From the perspective of northern Idaho, the southwestern Idaho visitor plays an economic role equivalent to that of any nonresident tourist from, say, California or Washington. To the extent that Idaho residents spend their leisure time at home enjoying Idaho resource-based amenities rather than traveling elsewhere, monies stay in state rather than flowing out to other states, and these stay-at-home monies circulate and enrich the economy in much the same way they would if they had come from some other state.

The In-Region Leisure Traveler. The spending in Coeur d'Alene of a California resident, or for that matter a resident of southwestern Idaho, is clearly part of northern Idaho's economic base -- it brings outside monies to northern Idaho. But what about in-region spending (say, spending in Coeur d'Alene by a Moscow or Lewiston resident)? According to economic base theory, in-region leisure travel spending is not part of the economic base. The argument runs as follows. The leisure spending of regional residents, leisure or otherwise, is attributable to the regional industry in which those residents earned their income. If residents had not chosen to spend a portion of their discretionary income on leisure travel, they would have spent their money on some other regional endeavor (perhaps buying a VCR, going to the movies, or making some other purchase). The argument rests, in other words, on the notion that the monies would have been spent in-region anyway, and so should not be counted as part of the tourism-leisure travel economic base.

However, it can be counter-argued that, in large measure, we are modeling not simply tourism, but the total of economic activity generated by the state's amenity endowment -- Idaho's amenity economy. Like the visitor from outside the state, the resident leisure traveler is drawn to the region's amenity resources. If that amenity resource were not there, the resident leisure traveler might very well travel out-of-state instead. The spending thus diverted out-of-state would reduce the region's economic base and income. In the economic literature, this phenomenon is termed "import-substitution" (Richardson 1979). Our research examined the spending of both in-region and out-of-region leisure travelers and tracked their respective economic roles.

The Convention Traveler. Travel for conventions, conferences and professional meetings is another source of economic income that can be included as part of the amenity economy if we assume that convention attendance is typically accompanied by additional leisure travel and recreation activities. These activities may be as simple as shopping for souvenirs for one's children or as expensive and time-consuming as adding several days on to one's trip to tour or recreate in nearby areas rich in outdoor-amenity resources. Our 1987 research (Harris et al. 1987) found that conventions brought in a minimal percentage (2%) of outside visitors to the state in 1987.

The Role of Interstate Trade Generated by Amenity Resources in Idaho's Economy. Another way in which recreation and leisure travel impacts Idaho's economy is through the interstate trade that is generated by amenity-based travel. For example, Idaho Falls' trade-dominance extends beyond communities in the Upper Snake River Basin to Teton County and the state of Wyoming -- specifically, the valley of Jackson Hole. Trade dominance of Jackson Hole by Idaho Falls means that consumption, both by tourists and businesses in the Jackson Basin, generates additional jobs and income in Idaho Falls

and other parts of southeastern Idaho. Some portion of southeastern Idaho's economic base is determined by its role as a trade center serving Jackson Hole and Teton County. Given that a large portion of that economy is dependent on the tourism and amenity resources of that area, a portion of southeastern Idaho's economic base is tied to recreation and leisure travel in Jackson and the Teton-Yellowstone complex. This economic activity affects the economic health of Idaho Falls and other parts of southeastern Idaho. It is another part -- albeit one step removed -- of Idaho's amenity economy.

■The Portion of Idaho's Amenity Economy Examined in This Study

We have identified several components of Idaho's amenity economy. In detailing the role of recreation and leisure travel spending in Idaho's economy below, we rely on our 1987 Survey of Recreation and Leisure Travel (Harris et al. 1987). It should be noted that the 1987 study did not track every facet of the amenity economy. Accordingly, it is important to understand that our economic portrayal below tracks only part of Idaho's amenity economy.

Explicitly included in our analysis is the economic impact of the traditional tourist, the in-region leisure traveler, and convention travelers visiting in part for recreation and leisure. Excluded from our analysis is the economic role of the retired, leisurely and footloose, except for those who traveled for recreation and leisure in 1987. We also excluded all business and meeting travel that was not combined with the pursuit of leisure activities. Finally, interstate trade-related impacts, such as the impact of amenity-related economic activity in Jackson Hole as discussed above, were not included in this analysis.

Surveying Leisure Travelers to Collect Data on Tourism Spending in Idaho

■The 1987 Idaho Leisure Travel and Recreation Study

The 1987 Idaho Leisure Travel and Recreation Study (ILTRS) consisted of a survey of leisure travelers contacted en route in Idaho (for details about this survey research, see Harris et al. 1987). The purpose of this statewide, year-round study was to determine who Idaho's travelers are, what they do, and how they think about and make travel decisions. Information for the study was collected from people on recreational or pleasure trips who were contacted as they were traveling between mid-June 1986, and mid-June 1987. The study's goals included: (1) To assemble a comprehensive data base on Idaho's tourists and outdoor recreationists using scientifically rigorous methods that provide accurate and representative statistics on the scope and nature of leisure travel and outdoor recreation in Idaho; and (2) to identity the extent of the impacts of the travel and tourism industry on Idaho's economy.

The study examined all trips taken for recreation or leisure in Idaho during the study year. The sampling sites for the study were segments selected from all 20-mile segments of interstate, federal and state highways in the state. A number of survey instruments were used to collect data, including a front-end interview form used to collect information from leisure travelers contacted at one of the study's 36 roadside interview sites. If the vehicle was found to contain leisure travelers, each person in the vehicle completed a questionnaire. Each group received trip diaries to complete, including a record of its trip expenditures over a two-day period. Travelers at two selected airports were also surveyed. Details on the methodology of the data-collection, analysis, and expenditure estimation procedures used in this study are provided in Appendix A.

Data on traveler expenditures from the 1987 Idaho Leisure Travel and Recreation Survey were thus available that could be broken out by traveler origin, location of expenditure, and other variables. These data were analyzed in a variety of ways, based on: the region in which the expenditure was made (including a "non-Idaho region"), the importance of resident versus nonresident expenditures, and those sectors of the economy that benefit most from travelers originating in different regions, including outside the state.

■Major Results of the ILTRS

A total of 16,413 groups of travelers were contacted over the four-season study period. Of these groups, 34 percent (5366 groups) was traveling in Idaho for leisure or pleasure and was extensively interviewed. Table 1 shows the estimated total number of leisure or recreation trips taken by persons traveling from their home community in or through Idaho during the study year. It shows the breakdown of this total estimate by region and season. As Table 1 shows, over 7.14 million trips were taken, of which 91,143 (1.3%) were trips involving air travel. The vast majority of the trips in the state were thus "rubber-tire," or vehicular travel on Idaho's highways.

■Estimating Total Expenditures from Recreation and Leisure Travel in Idaho

The total dollar amount of expenditures by parties traveling for recreation or leisure (or "leisure-travel expenditures") was calculated in terms of both the region in which that spending occurred

Table 1. Estimated number of leisure travel recreation trips in Idaho in 1987, by region and season.

REGION OF IDAHO	Season				TOTAL
	Summer	Fall	Winter	Spring	
1	855,180	297,847	175,463	393,854	1,722,344
	(50%)[1]	(17%)	(10%)	(23%)	(24%)[2]
	(29%)[2]	(26%)	(18%)	(20%)	
2	347,407	201,993	110,986	130,162	790,548
	(44%)	(26%)	(14%)	(16%)	(11%)
	(12%)	(17%)	(11%)	(7%)	
3	463,014	192,715	192,359	486,635	1,334,723
	(35%)	(14%)	(14%)	(37%)	(19%)
	(15%)	(17%)	(20%)	(25%)	
4	545,206	108,422	142,542	569,027	1,365,197
	(40%)	(8%)	(10%)	(42%)	(19%)
	(18%)	(9%)	(15%)	(30%)	
5	264,631	179,002	160,358	138,983	742,974
	(35%)	(24%)	(22%)	(19%)	(11%)
	(9%)	(15%)	(17%)	(7%)	
6	517,289	176,394	187,775	215,297	1,096,755
	(49%)	(16%)	(17%)	(20%)	(16%)
	(17%)	(15%)	(19%)	(11%)	
Air Travel					91,143
TOTAL	2,992,727	1,156,373	969,483	1,933,958	7,143,684
	(43%)[1]	(16%)	(14%)	(27%)	

[1]Percentage of the total for region (row percent).
[2]Percentage of the total for season (column percent).

and the region in which a given party's trip originated. This series of calculations provided an estimate of the total amount of leisure-travel dollars spent in each of the three regions of Idaho (northern, southwestern, and southeastern Idaho), plus all non-Idaho (or "Outside Idaho"). These regional expenditures were also analyzed in terms of the origins of the travel parties (i.e., the three regions of Idaho and all origins outside Idaho).

The estimates of expenditures for recreation and leisure travel in northern, southwestern, and southeastern Idaho for specific expenditure items are broken out by origin in Tables 2, 3 and 4, respectively. These tables are aggregated from more detailed data extracted from the ILTRS database. These detailed data appear in Appendix B, Tables B1 through B3.

As Table 2 shows, approximately $145.3 million were estimated to have been spent in northern Idaho by parties traveling for recreation or leisure, while $99.6 million in leisure-travel expenditures were made in southwestern Idaho (Table 3), and $131.3 million were spent in southeastern Idaho (Table 4) -- for a total of $376.2 million for the entire state. Spending by parties traveling for recreation or leisure in northern Idaho accounted for the largest proportion of all spending in the state (39%; Figure 2), with southeastern Idaho representing nearly as large a proportion (35%), and southwestern Idaho accounting for only about a fourth (25%) of all leisure travel spending.

Figures 3 through 5 are based on dollar amounts and percentages reported in the fifth column in Tables 2 through 4, which show the total leisure-travel dollars spent in each of the three regions of Idaho (northern, southwestern, and southeastern Idaho) in terms of the origins of the trips taken by those parties (the three regions and all origins outside Idaho). Figures 3 through 5 show the proportion of total expenditures made in five major categories of goods or services: lodging, food and beverage, transportation, retail trade, and other expenses (e.g., services, licenses and fees). Although those proportions vary somewhat from region to region, in general about 15 percent was spent on lodging, about 33 percent on food and beverages, 25 percent on transportation, about 15 percent on retail trade and about 10 percent on other goods and services.

Figures 6 through 8 are also based on the data reported in Tables 2 through 4. They show the proportion of dollars spent in each regional economy by travelers originating in each of the other regions. In the case of northern Idaho (Figure 6), nearly three-quarters (72%) of all the leisure-travel dollars spent there were made by parties originating from outside Idaho, while 19 percent of those dollars was spent by travelers from the region itself (northern Idaho). Much smaller proportions of total leisure-travel expenditures were found for parties originating from southwestern Idaho (6%) and southeastern Idaho (2%).

Figure 7 shows that a much smaller percentage of the leisure-travel expenditures made in southwestern Idaho were made by parties originating from outside Idaho (61%), relative to those in northern Idaho. Thirty-one percent of all leisure-travel dollars spent in southwestern Idaho was spent by leisure travelers from that region. Again, much smaller proportions of total leisure-travel expenditures were made by parties from the other two regions: northern Idaho (4%) and southeastern Idaho (4%).

In the case of southeastern Idaho (Figure 8), nearly three-quarters (74%) of all the leisure-travel dollars spent there were made by parties originating from outside Idaho, as was the case in northern Idaho. And, as in northern Idaho, 20 percent of those dollars was spent by travelers from the region itself (southeastern Idaho), with much smaller proportions of total leisure-travel expenditures spent by parties originating from southwestern Idaho (4%) and northern Idaho (2%).

The results reported in columns 1 through 4 of Tables 2 through 4 are also revealing. For example, the results for nonresidents of Idaho (travelers originating from "Outside Idaho") for all three regional economies indicate the relatively greater share of expenditures contributed by these travelers in the various spending categories of Idaho's regional economies, and also the differences in the relative proportions. In northern Idaho, for example, those impacts are fairly evenly distributed among four of the spending categories (around 11 to 14%); however, a relatively much greater proportion was estimated for food and beverage (24%) and a relatively much smaller proportion was estimated for lodging (10%) in that region. In contrast, nonresidents overall accounted for smaller proportions of total spending in southwestern and southeastern Idaho, and much larger proportions of all spending were found for transportation in southwestern Idaho and transportation, food and beverage and lodging in southeastern Idaho. The figures for spending by Idaho residents show that very small proportions were estimated for those residents of Idaho not originating from the region itself. In the case of all three regions, the spending of these travelers accounted for only 1 to 2 percent of the total expenditures in the region.

The spending of travelers originating from the region in which the spending occurred reflects import substitution. That is, we are making the assumption that if the recreation opportunities in the region were not there as well as convenient, the individuals traveling would have gone elsewhere and the income kept within the region thereby lost to it. In all three regions, the largest proportion of spending was, not surprisingly, in food and beverage. Even in this case, the claim of import substitution is not totally specious: the authors' personal experience is that,

Table 2. Total recreation and travel spending in northern Idaho, by major expenditure category and origin.

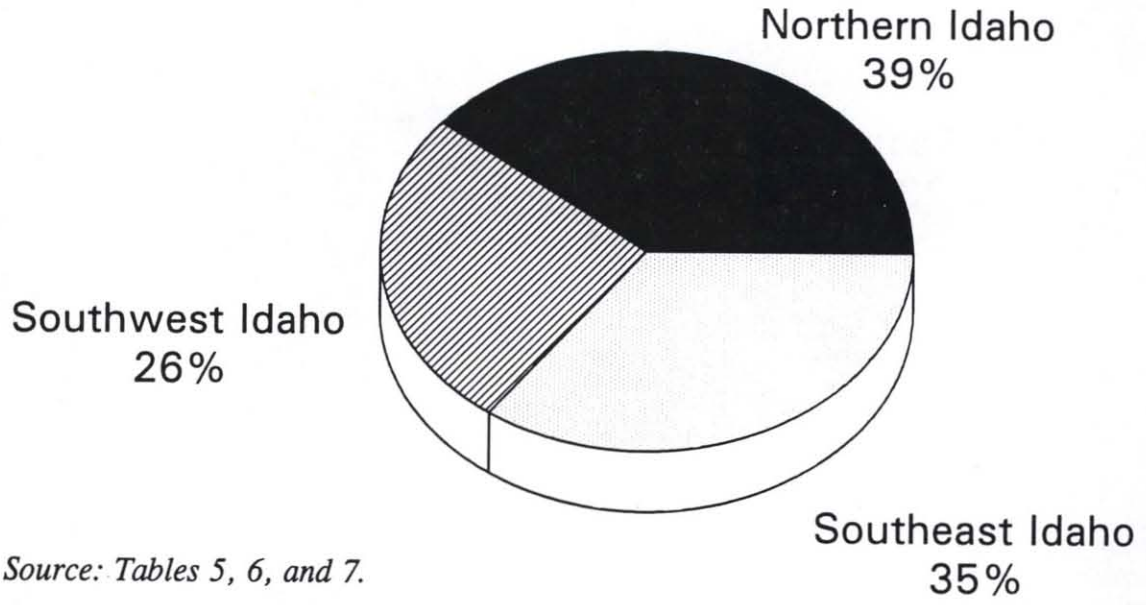
ORIGINS Expenditure Category	North Idaho	Southwest Idaho	Southeast Idaho	Outside Idaho	Total Expenditure
	- - -	(Millions 1987 $)		- - -	
Lodging	$3.629 2.50%	$1.618 1.11%	$0.751 0.52%	$14.042 9.66%	$20.040 13.79%
Food & Beverage	$10.869 7.48%	$3.269 2.25%	$1.056 0.73%	$34.836 23.97%	$50.030 34.43%
Transportation	$5.430 3.74%	$1.741 1.20%	$1.003 0.69%	$20.041 13.79%	$28.215 19.42%
Retail Trade	$3.810 2.62%	$2.154 1.48%	$0.463 0.32%	$19.871 13.67%	$26.298 18.10%
Other Expenditures	$4.430 3.05%	$0.393 0.27%	$0.224 0.15%	$15.689 10.80%	$20.735 14.27%
Total all Expenditures	$28.167 19.38%	$9.175 6.31%	$3.497 2.41%	$104.478 71.90%	$145.316 100.00%
Grand Total					$145.316

Table 3. Total recreation and travel spending in southwestern Idaho, by major expenditure category and origin.

ORIGINS Expenditure Category	North Idaho	Southwest Idaho	Southeast Idaho	Outside Idaho	Total Expenditure
	---		(Millions 1987 $)	---	
Lodging	$0.524 0.53%	$2.968 2.98%	$0.924 0.93%	$10.493 10.53%	$14.909 14.96%
Food & Beverage	$1.181 1.19%	$13.505 13.55%	$1.339 1.34%	$12.768 12.81%	$28.792 28.90%
Transportation	$1.095 1.10%	$4.410 4.43%	$0.638 0.64%	$21.607 21.69%	$27.750 27.85%
Retail Trade	$0.678 0.68%	$8.107 8.14%	$0.596 0.60%	$5.915 5.94%	$15.296 15.35%
Other Expenditures	$0.670 0.67%	$2.173 2.18%	$0.111 0.11%	$9.936 9.97%	$12.890 12.94%
Total all Expenditures	$4.147 4.16%	$31.163 31.28%	$3.608 3.62%	$60.718 60.94%	$99.637 100.00%
Grand Total					$99.637

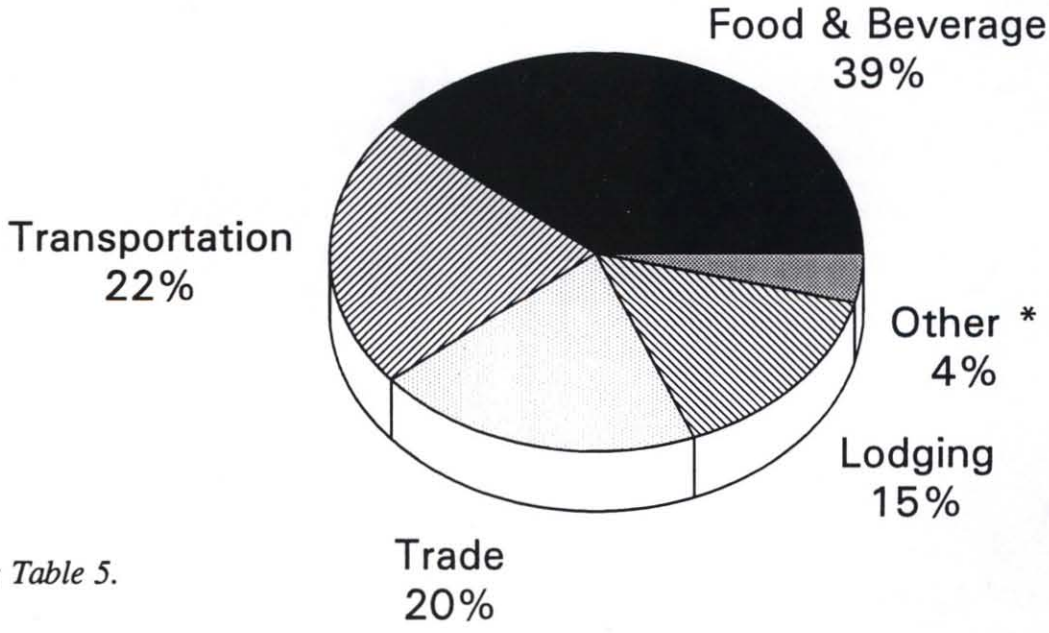
Table 4. Total recreation and travel spending in southeastern Idaho, by major expenditure category and origin.

ORIGINS Expenditure Category	North Idaho	Southwest Idaho	Southeast Idaho	Outside Idaho	Total Expenditure
	---		Millions 1987 $)	---	
Lodging	$0.081 0.06%	$1.518 1.16%	$2.496 1.90%	$17.993 13.70%	$22.088 16.81%
Food & Beverage	$0.599 0.46%	$1.799 1.37%	$8.377 6.38%	$24.061 18.32%	$34.837 26.52%
Transportation	$2.021 1.54%	$0.402 0.31%	$6.215 4.73%	$32.469 24.72%	$41.106 31.29%
Retail Trade	$0.239 0.18%	$1.121 0.85%	$2.930 2.23%	$11.071 8.43%	$15.361 11.69%
Other Expenditures	$0.137 0.10%	$0.234 0.18%	$5.829 4.44%	$11.770 8.96%	 13.68%
Total all Expenditures	$3.077 2.34%	$5.073 3.86%	$25.848 19.68%	$97.364 74.12%	$131.362 100.00%
Grand Total					$131.362



Source: Tables 5, 6, and 7.

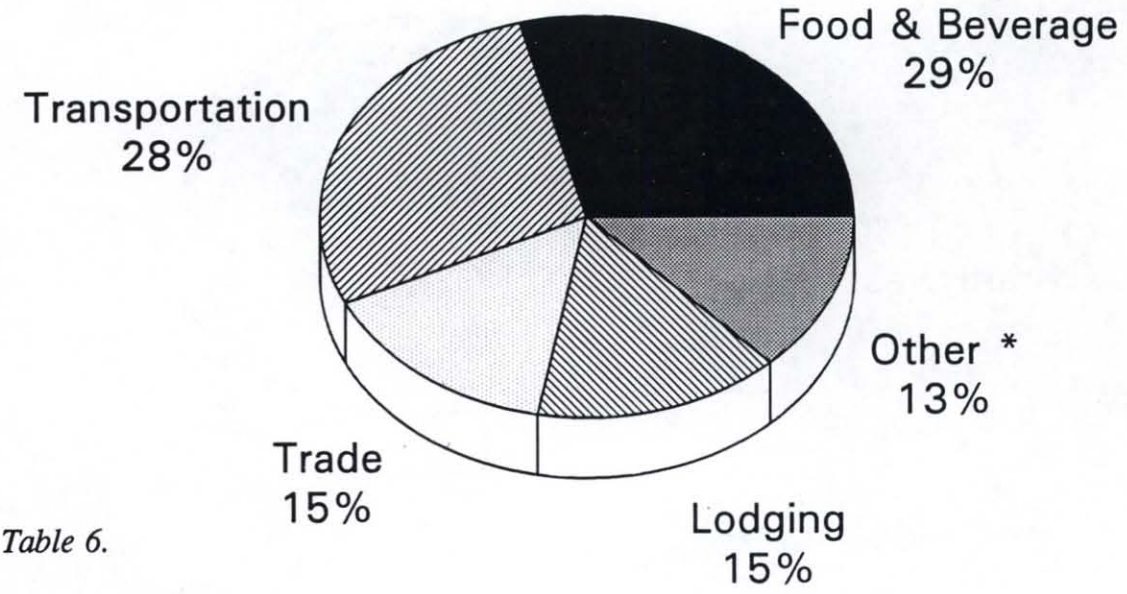
Figure 2. Recreation and leisure travel spending in Idaho by region in 1987.



Source: Table 5.

* Services, licences, & fees.

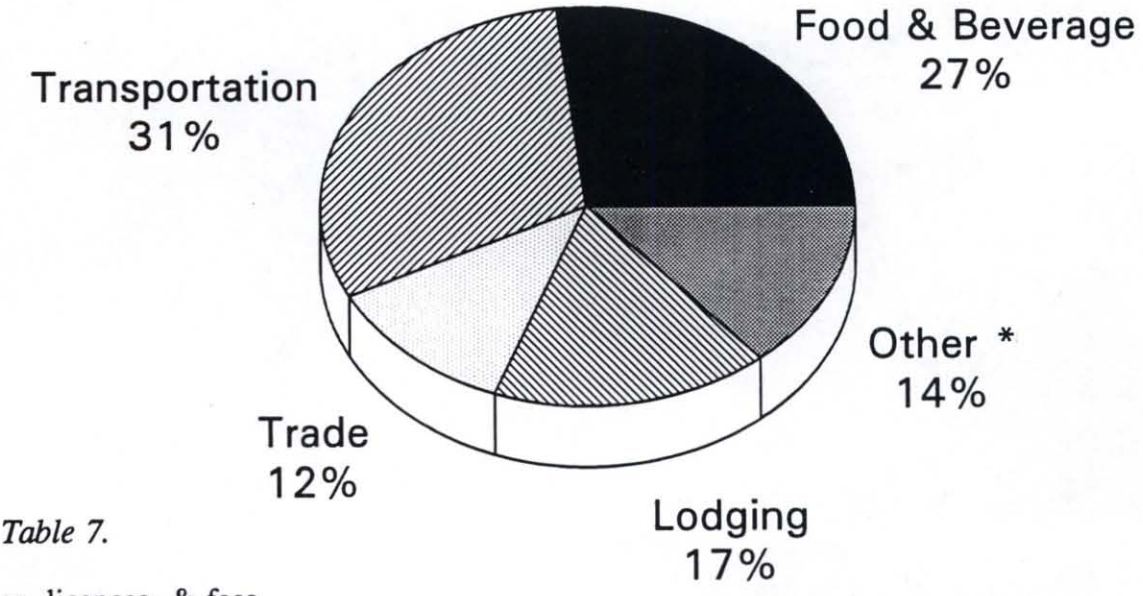
Figure 3. Recreation and leisure travel expenditures in northern Idaho.



Source: Table 6.

* Services, licences, & fees.

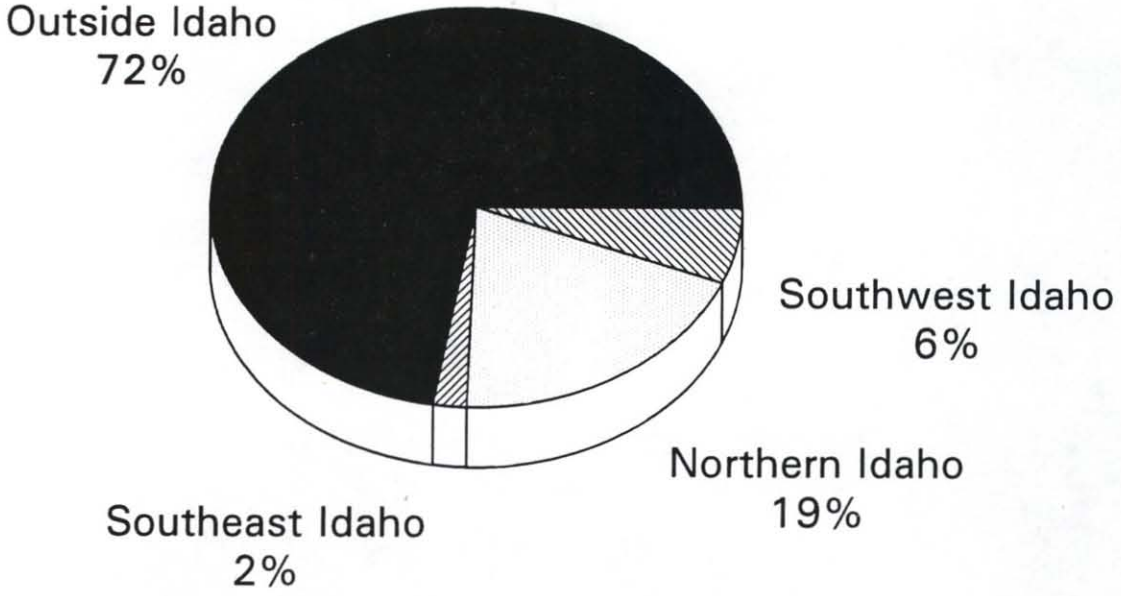
Figure 4. Recreation and leisure travel expenditures in southwest Idaho.



Source: Table 7.

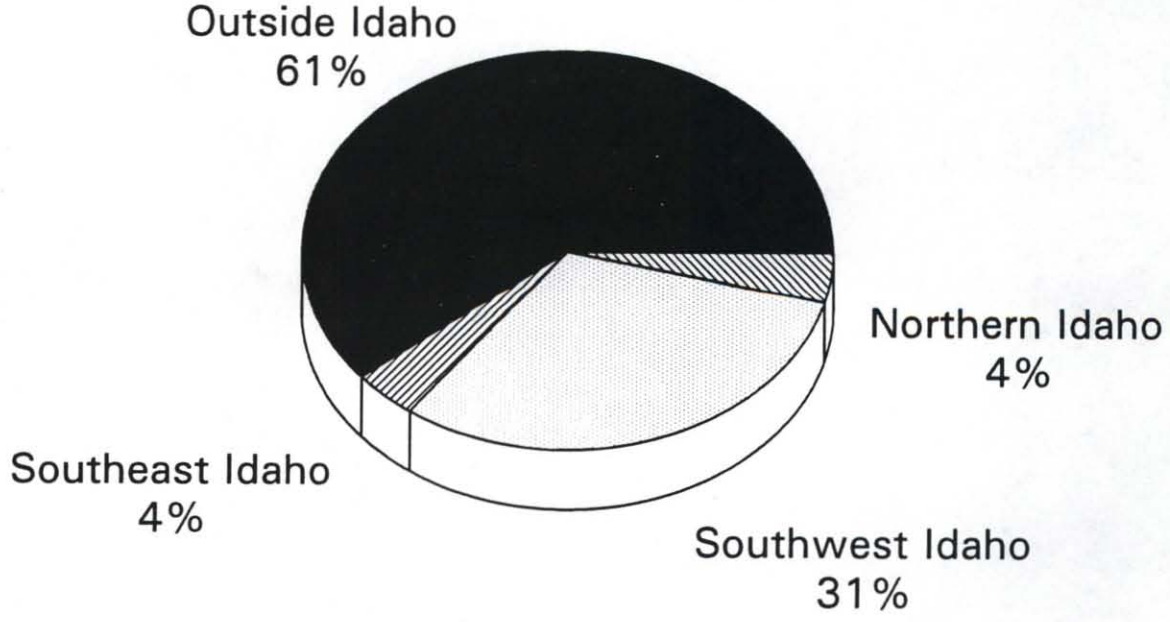
* Services, licences, & fees.

Figure 5. Recreation and leisure travel expenditures in southeast Idaho.



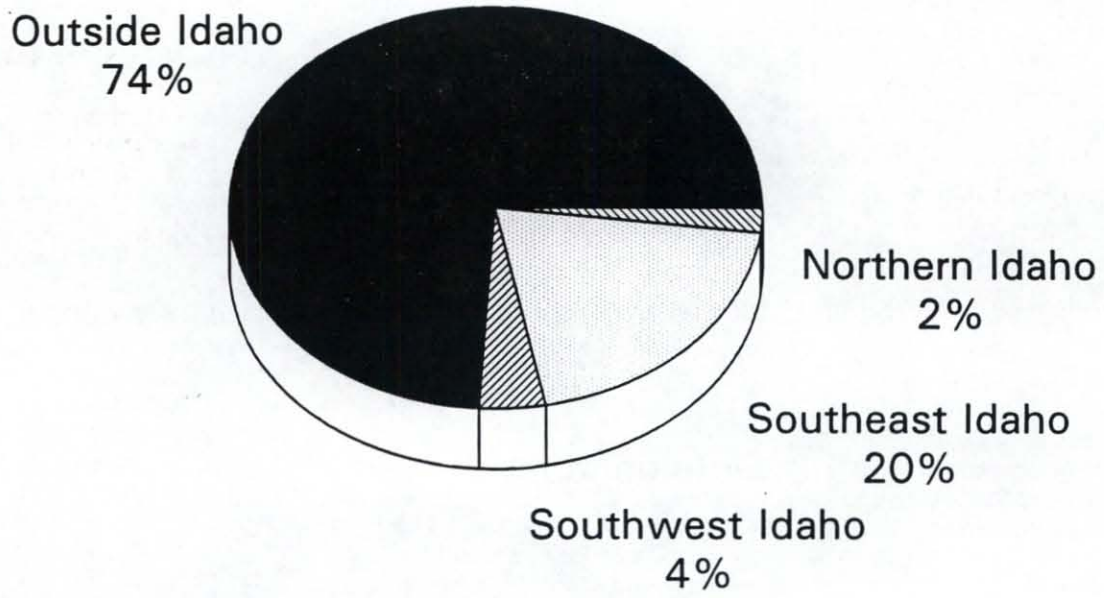
Source: Table 2.

Figure 6. Recreation and leisure travel spending in northern Idaho by trip origin.



Source: Table 3.

Figure 7. Recreation and leisure travel spending in southwest Idaho by trip origin.



Source: Table 4.

Figure 8. Recreation and leisure travel spending in southeast Idaho by trip origin.

when the kind of dining experience desired is not available in one's resident community (e.g., Moscow, Idaho), they and other Idahoans may travel to a town in another state to dine out (e.g., Pullman, Washington -- only 8 miles away, but a state away in terms of political boundaries). Interestingly, the relative proportions spent by regional residents traveling in southwestern Idaho on this sector, and also on retail trade, were much higher (14% and 8%, respectively). In contrast, in southeastern Idaho, these percentages were comparatively much smaller: only 6 percent on food and beverage, 2 percent on retail trade, and 5 percent on transportation.

The mix and magnitude of recreation and leisure travel spending have important implications for the overall economic impact of that spending. In the next section, we consider this overall economic impact with the assistance of an economic impact model constructed for Idaho's three regions.

Modeling the Role of Recreation and Leisure Travel in Idaho's Regional Economies

■Economic Models of the Idaho Economy.

A set of economic models, input-output models, have been developed for the Idaho economy (Robison et al. 1988; Robison et al. 1991). The models reflect Idaho's three economic regions, southeastern, southwestern and northern Idaho, and portray Idaho's economic base.

Our estimates of recreation and leisure travel spending were used as inputs to our three economic models of Idaho to determine the overall impact of that spending. But first the recreation and leisure travel spending had to be "bridged" from spending categories to economic model categories.

■Bridging Recreation and Leisure Travel Spending To The Idaho Economic Models

Monies from tourism spending that come from outside the state, for example, are re-spent in the Idaho economy in the provision of business and consumer goods of all kinds. These re-spent monies are received by other businesses and then re-spent again as wage payments and the purchase of still other business and consumer goods. This process of spending and re-spending continues, resulting in the multiplier effect often discussed by regional economists. The total income and employment impact of the outside tourism spending is obtained as the sum of this chain of re-spending.

To calculate the magnitude of these impacts, the expenditure data had to be transformed, or "bridged," from the form presented in Tables 2 through 4 to one appropriate for use in the models of Idaho's regional economies. To accomplish this, we developed a set of "bridge tables" for each of our models. First, bridge tables were constructed for each model to apportion the dollars spent on a type of good or service (i.e., sales) by travelers in a given region to the various industry sectors that require payments ("producer prices") for their contribution to production of that good or service (this is termed "margining"). This margining was done using U.S. Department of Commerce data.

An example will help illustrate the necessity for this bridging. Consumer-spending categories do not correspond one-to-one with the categories of an input-output model. Take the expenditure category "tires, tubes, accessories and parts." The input-output model indicates a commodity "tires and inner tubes." Yet the two refer to substantially different things. The input-output category refers to the industry output of a particular item, tires and inner tubes, while the consumption categories refer to what consumers spend on these items. In the case of a tire or inner tube, what the consumer pays is considerably different from what the manufacturer of the item receives. In particular, a large part of the consumer's expenditure goes to the retailer of the tire or tube as his mark-up. There are also transportation costs, wholesaling costs, and an assortment of indirect taxes and other items. The tire producer receives considerably less than the tire purchaser pays. The incorporation of the purchase of a tire in an input-output model requires that the purchaser's expenditure be allocated to the various economic sectors that participate in the production and delivery of the tire; it requires that the purchaser's price (the total amount of dollars spent for the tire) be "bridged" into producer's prices, or who gets what amount of the total as a result of the tire sale.

A second set of bridge tables were built that indicate the amount of the dollars linked to tourism spending that was actually paid to a particular type of producer or distributor in the state of Idaho. The remainder represents "leakage," or the flow of dollars out of the state for goods and services not produced in Idaho. Thus, these tables indicate a given region's recreation and leisure travel spending bridged to (regional) Idaho business revenues. (See Appendix B for further details on this bridging process.)

This bridging process determined that of the $145.3 million spent in 1987 on recreation and leisure travel in northern Idaho, $38.8 million left the state for the purchase of goods and services imported for tourist consumption. Similarly, of the $99.6 million spent in southwestern Idaho, $20.7 million left the state for the purchase of imports, as did $31 million of the $131.4 million spent in southwestern Idaho. In total, of the $376.2 million spent on recreation and leisure travel in Idaho in 1987, we estimate that approximately 26 percent, or

$96.5 million, left the state for the purchase of imports--leaving a total of $285.7 million in the state.

Results of the Modeling: Estimates of the Income and Employment Impacts of Tourism on the Idaho Economy

The results of the modeling are presented, first, for each region as a whole and, second, for each of the regions by each origin.

■Regionwide Estimates

Tables 5 through 7 show the amount of income and employment for major categories of Idaho industry that is linked to recreation and leisure travel spending in the three regions of Idaho, while Tables 8 through 10 show the proportion of the total income by region derived from that spending attributable to each of the various sectors of the Idaho economy. "Income" in these tables is defined in the broad sense of value added or gross state product. Income thus includes the total of all employee compensation, proprietary income, corporate profits, interest, rents, indirect business taxes, and depreciation allowances. "Baseline income" is simply the total of all income generated in each of the various sectors of the Idaho economy. Thus, northern Idaho's baseline income is approximately $2,557.3 million (Table 5); southeastern Idaho's is approximately $5,384.4 million (Table 6); and southwestern Idaho's is approximately $5,575.4 million (Table 7). The total of these, $13,517.1 million, is Idaho's gross state product, the state's contribution to gross national product.

Recreation and leisure travel spending shown in Tables 2 through 4 are revenues in the industries that receive them. Industries disperse these revenues as payments for their various inputs and other expenses, including supplies from other industries, wage payments, interest and rental expense, and direct business taxes. The remainder constitutes a business cash flow available to cover profits and depreciation expenses. The monies generated in this process, including the wage payments and business cash flow, is income linked to recreation and leisure spending.

The income-generating effects of recreation and leisure spending, however, do not end with the direct effect. Income is generated in the businesses supplying inputs to the industries directly linked to recreation and leisure spending. And much of the wages and cash flow of business is spent, leading to still other income generation. In addition, tax payments are made, thus providing income to government workers. All of these other rounds of income generation give rise to still further spending and income generation, and then to still further spending and income generation, and so on through the maze of economic interconnections that make up the Idaho economy. The Idaho economic models track this maze of interconnected spending and thereby indicate the total impact of recreation and leisure spending in the state economy.

It is important to note that our models of the Idaho economy provide a snapshot of one year -- in this research, 1987. If, instead of portraying a static, single-year description of the role of recreation and leisure spending in the economy, our tables were able to show the growth of industries in the economy, then the picture for the recreation and leisure economy would likely be considerably different. It appears that the recreation and leisure-linked industry is among Idaho's fastest growing industries (food processing and manufacturing is also a fast-growing industry in the state), and tourism represents one of its greatest opportunities for future development (along with sectors such as secondary processing of wood products). Unfortunately, addressing this important issue is beyond the scope of our present research, although it would be a worthwhile endeavor for future work.

First, we summarize our findings for the state as a whole. We estimate that $376.2 million were spent by recreation and leisure travelers in Idaho in 1987. However, an estimated 26 percent has left the state in payment for imported goods ultimately purchased by recreation and leisure travelers in the state. The remainder, approximately $289.5 million, are direct net revenues for Idaho businesses. Taking into account re-spending effects, and linking these recreation and leisure travel revenues, a portion of investment spending in the state, and government income, Idaho recreation and leisure travel accounts for a total of $449.7 million, or 3.3 percent of Idaho's $13,517.1 million gross state product. In comparison, Idaho's timber industry accounts for 11.9 percent, mining 2.2 percent, agriculture 21.0 percent and food processing 14.0 percent (Robison et al. 1991).

When we compare the role of tourism expenditures in generating income and employment across the three regions of Idaho, significant differences can be found in the importance of these expenditures, both in terms of the income generated and the sectors of the regional economies that most benefit from this spending.

Total income linked to recreation and leisure travel spending (termed "linked income") is indicated in the second column of Tables 5 through 7, while the third column shows the percent of an industry's income in each region that is attributable to recreation and leisure travel (termed "percent linked"). Focusing first on northern Idaho (Table 5), we can describe the pattern of industry impacts there. Hotels and motels are, not surprisingly, most impacted, with 50.9 percent of all their income linked

to recreation and leisure spending. Next are eating and drinking places, with 21.5 percent of their income linked to recreation and leisure spending, and amusements, which represents a mixed group of industries that included ski resorts, outfitters and guides, and bowling alleys, with 17.5 percent of its income linked to recreation and leisure spending. Other sectors in northern Idaho positively impacted by recreation and leisure travel spending include consumer services (15.9% of its income linked to recreation and leisure spending), food manufacturing (15.3%), and retail trade (13.3%).

In southwestern Idaho (Table 6), hotels and motels are again most impacted, with 59.2 percent of all their income linked to recreation and leisure spending. Next is eating and drinking places, with 8.0 percent of their income linked to recreation and leisure spending, and then consumer services (7.0% of its income linked to recreation and leisure spending) and amusements (5.6%).

In southeastern Idaho (Table 7), hotels and motels are again most impacted, but only 36.1 percent of all their income is linked to recreation and leisure spending. Next is eating and drinking places (12.4% of their income linked to recreation and leisure spending), and then transportation (8.8%) and amusements (6.1%).

The linkage of the above industries to recreation and leisure spending is expected. Less expected is the linkage of industries such as construction and concrete products, hospitals, utilities, logging and wood products, and mining. As indicated earlier, as with other sources of monies from outside the state or from other in-state regions, recreation and leisure spending sets in motion a whole string of income-generating activity. It stimulates much consumer activity, including new house construction, and it stimulates business investment. Housing and business investment affect the construction trades, which in turn affect industries such as concrete products, mining, and even logging and timber, to the extent that these industries supply the local building trades. Also, the many recipients of income linked to recreation and leisure spending have occasional need for hospital services, and so a portion of the income in that sector is linked to recreation and leisure spending. Accounting for all the linkages, through the most remote economic interconnections, results in a recreation and leisure spending-linked economy that affects nearly every industry in terms of the proportions shown in Tables 5 through 7.

Tables 5 through 7 also indicate the overall role of recreation and leisure spending in the Idaho economy. In northern Idaho, 6.6 percent of all income and 8.5 percent of all employment are linked to recreation and leisure spending (Table 5). In southwestern Idaho, the comparable percentages are 2.4 percent of all income and 2.8 percent of all employment (Table 6). Finally, in southeastern Idaho, 2.5 percent of all income and 3.6 percent of all employment are linked to recreation and leisure spending (Table 7).

Employment linkages of Tables 5 through 7 follow the same logic as the income linkages. The slightly higher percentage of employment than income linked to recreation and leisure spending likely reflects the generally lower wages paid in industries that are directly linked to recreation and leisure spending.

Tables 8 through 10 indicate recreation and leisure spending linkages by sector from a different perspective. While Tables 5 through 7 indicate the percentage of each industry's baseline income linked to recreation and leisure spending, Tables 8 through 10 indicate each industry's income linked to leisure travel expressed as a percentage of the total income linked to recreation and leisure travel. That same hotel and motel income accounts for only 9.0 percent of all northern Idaho income linked to recreation and leisure spending (Table 8). Other important linkages here include retail trade, accounting for 14.1 percent of all income linkages, state and local government, accounting for 12.5 percent of all income linkages, and eating and drinking, accounting for 9.9 percent of all income linkages. Retail trade is impacted directly by recreation and leisure spending and indirectly through the spending of consumer income generated in the first instance by recreation and leisure spending. State and local government and the services they provide are impacted to a small extent by licenses and fees purchased by recreation and leisure travelers, but mainly through their funding by taxes on income that is linked to leisure-travel spending.

In southwestern Idaho, that same hotel and motel income accounts for only 7.6 percent of all regional income linked to recreation and leisure spending (Table 9). More important linkages here include retail trade, accounting for 18.0 percent of all income linked to recreation and leisure travel, and F.I.R.E. (finance, insurance, and real estate), accounting for 18.0 percent of all linked income. Other important linkages here include state and local government (8.0%), transportation (7.8%) and eating and drinking (7.3%).

A different pattern was found in southeastern Idaho, although here the linked income for the hotel and motel sector accounts for only 8.6 percent of all income linked to recreation and leisure spending (Table 10). Other important linkages here include retail trade, accounting for 14.1 percent of all income linkages, state and local government (10.2%), F.I.R.E. (8.0%), and eating and drinking (9.9%).

These findings suggest that larger proportions of the income of various industries in northern Idaho were attributable to recreation and leisure travel spending than was the case for the other two regions of Idaho. However, the positive economic impacts were more evenly spread among a variety of sectors in southwestern and southeastern Idaho.

Interestingly, a majority of the income of the hotel and motel sector in northern and southwestern Idaho is accounted for by leisure travel, but only a little over a third of that sector's income was linked to leisure travel in southeastern Idaho. These findings indicate the importance of business as well as pleasure travel in the western half of the state, and they also suggest the potential for growth in this sector and its spillover benefits for other sectors, like eating and drinking throughout Idaho -- and especially in eastern Idaho.

■Estimates for Each Region by Origin

Two sets of tables present the income and employment linked to the expenditures of leisure travelers for each region broken out by the origin of those travelers. The first set provides this information in the same format as Tables 5 through 7: Tables 11 through 14 for northern Idaho, Tables 19 through 22 for southwestern Idaho, and Tables 27 through 30 for southeastern Idaho. The first table in each set shows the income and employment impacts of spending by nonresidents of Idaho ("Outside Idaho"); the remaining three tables report the impacts of travelers from each of the three Idaho regions.

The second set of tables provides this information in the same format as Tables 8 through 10: Tables 15 through 18 for northern Idaho, Tables 23 through 26 for southwestern Idaho, and Tables 31 through 34 for southeastern Idaho.

As the tables for leisure-travel spending (Tables 5 through 7) show and the above tables confirm, the vast majority of the impacts of this spending are attributable to travelers from outside Idaho. For example, in northern Idaho, 6.6 percent of the region's gross product is accounted for by recreation and leisure-travel spending, and 74.2 percent ($122.1/$169.0) of that gross product is from the spending of nonresident travelers. Similarly, in southwestern Idaho, 2.4 percent of the region's gross product is accounted for by recreation and leisure-travel spending, and 65.9 percent ($92.3/ $140.1) of that gross product is from the spending of nonresident travelers. Likewise, 2.5 percent of southeastern Idaho's gross product is accounted for by recreation and leisure-travel spending, and 75.6 percent ($106.3/ $140.6) of that gross product is from the spending of nonresident travelers.

Conclusions

Our research has produced a number of important findings. As indicated in Tables 5 through 7, recreation and leisure spending is not, in the context of these broad regions, Idaho's most important industry. Recreation and leisure spending is most important in northern Idaho, but here it still accounts for only 6.6 percent of all income and 8.5 percent of all employment. Comparable percentages for other regions are even smaller. Also, the bridging process revealed that a not insignificant proportion of direct recreation and leisure spending leaves the state through leakages in payment of purchased goods.

But some caution is in order in interpreting these findings. First, our figures represent the recreation and leisure economy as it existed in 1987, and much has happened since 1987, including the opening of the Coeur d'Alene Resort, the Silver Mountain Gondola, the Boise Convention Center, and other tourism-related development. In particular, Idaho had few facilities for large meetings, much less conventions, at the time this study was done. Now the Wallace Inn, the Coeur d'Alene Resort and the Boise Convention Center are all hosting meetings and, in the case of the second two, many conventions are bringing many more outside visitors to the state than the minimal percentage reported for 1987. As a result of recent tourism-related development in Idaho, lodging receipts across the state have increased 49 percent in the years since the data used in the present research were collected (Idaho Department of Revenues and Taxation Personal Comm.), indicating significant growth in the hotel/motel industry.

This situation has two major implications. One is that the economic benefits of tourism are being realized by particular communities, for whom the industry is critical from the perspective of the local economy. Obviously, the recreation and leisure travel industry is not evenly spread geographically across Idaho; rather, it is focused in particular places, such as Sandpoint, Coeur d'Alene, Silver Valley, McCall, Sun Valley, and others. Contrary to the picture of importance painted in Tables 5 through 7, the importance of the recreation and leisure travel industry in these places is great, although a precise determination of the extent of this dependence is beyond the scope of the research presented in this report.

A second implication is that efforts to expand tourism industry in other communities in Idaho can spread these benefits and help diversify and strengthen their economies and, ultimately, the state's economy. These findings reaffirm the idea that developing Idaho's tourism infrastructure will have benefits throughout the state.

By all indications, tourism has been an important part of the growth in Idaho's service economy. The tourism infrastructure and industry have experienced a major expansion since 1987, resulting in a 49-percent increase statewide just in lodging receipts between 1987 and 1991. Significantly, a major part of that growth has occurred in northern Idaho, where it can help offset the economic impacts of reduced timber harvests forecast for that region.

For example, a decline in Idaho's timber supply is expected in the coming year that will accelerate the

decreasing relative importance of that industry in the Idaho economy. Recent estimates suggest a 25-percent reduction in tree harvesting next year in northern Idaho, where timber ranked as the region's leading industry in 1987. In contrast, based on lodging receipts, the travel industry has grown about 64 percent in the region between 1987 and 1990. A rough-and-ready evaluation of these changes suggests that, all else remaining the same, the gross regional product of northern Idaho would remain nearly the same, but timber's contribution to the region's economy would drop by 11.1 percent, from 44.5 percent to 33.4 percent, while the share contributed by leisure travel would increase 4.3 percent, from 6.7 percent to 11 percent.

It is critical to note that the importance of these changes doesn't stem simply from their primary economic impacts. No one seriously proposes that loggers are going to become busboys and tour guides, and this suggestion misses the major point of our research results. Rather, what is important here are the secondary, indirect impacts of recreation and leisure travel, in that the businesses that the timber or recreation industries buy their goods and services from, like stores, gas stations and other local businesses, benefit when a growing travel industry helps replace the dollars generated by another industry that is purchasing fewer goods and spending less money. And the purchases of those businesses and their employees from still other businesses has a rippling effect throughout the region's economy that helps support it.

We would also note two additional facts often overlooked by analysts. First is that many of the state's tourism businesses are not publicly owned corporations, as are many firms in other industries. Much of the income attributed to those publicly owned firms may flow out of the state as corporate profits and payments to shareholders, while tourism enterprises are predominantly small-scale businesses whose income is likely to be proprietary income that remains within the state.

Second, the Idaho tourism industry also includes a great deal of business and convention travel, which was not included in this study. A rough estimate is that, when this component is added to the recreation and leisure travel component, Idaho's tourism industry may be almost twice the size of that portion identified in the current study.

The economic models of Idaho's leisure-travel economy described in this report represent the marriage of two massive research efforts, as the large number of descriptive tables in the main text and appendices reflects. Hence, this report only presents detailed results that address the two objectives of the present research: 1) To assess the impact of recreation and leisure travel spending on the Idaho economy and the three regional economies comprising it; and 2) To compare the impacts of spending by residents versus nonresidents traveling for recreation and leisure on those economies. However, in the course of meeting those objectives, a rich database has been developed that remains to be interpreted through further analyses.■

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Table 5. Income and employment in northern Idaho linked to recreation and leisure travel, from all origins.

Economic Sector	Total Income	Income Linked	Percent Linked[1]	Total Employment	Employment Linked	Percent Linked[1]
	---- (Millions 1987 $'s) ---					
Agriculture	$103.4	$1.2	1.13	1363.9	17.5	1.28
Mining	57.1	0.1	0.21	945.0	1.9	0.21
Construction	91.7	5.2	5.71	2348.7	134.3	5.72
Food Manufacturing	17.4	2.71	5.26	350.4	52.0	14.85
Apparel Manufacturing	7.7	0.4	5.11	255.3	13.4	5.25
Logging & Wood Products	532.5	1.2	0.22	9746.3	19.9	0.20
Printing & News	30.2	2.2	7.39	710.6	52.5	7.39
Concrete Product	7.9	0.4	5.03	156.9	7.9	5.04
Misc. Manufacturing	117.0	2.7	2.28	2514.5	61.5	2.44
Transportation	77.8	5.7	7.30	1453.9	106.3	7.31
Communications	90.4	5.1	5.65	1010.1	57.3	5.68
Utilities	90.2	4.4	4.89	591.6	29.0	4.90
Wholesale Trade	108.0	10.0	9.21	3013.2	277.9	9.22
Retail Trade	179.6	23.8	13.28	8919.9	1185.7	13.29
Finance, Insurance, R. & E.	235.5	15.6	6.64	2563.3	169.7	6.62
Hotels & Motels	30.0	15.3	50.94	1580.1	805.7	50.99
Consumer Services	58.6	9.3	15.92	1280.9	222.7	17.39
Business & Legal Services	100.9	9.0	8.94	2056.1	183.9	8.95
Eating & Drinking	77.5	16.7	21.50	4425.1	952.3	21.52
Amusements	30.6	5.3	17.46	810.0	141.6	17.48
Hospitals & Health	161.5	11.3	7.00	6429.2	450.4	7.01
State & Local Government	309.0	21.1	6.81	16020.6	1092.7	6.82
Federal Government	42.9	0.4	0.82	2743.3	22.5	0.82
TOTAL	$2,557.3	$169.0	6.61	71,288.9	6,058.6	8.50

[1]Percent of individual industry income (or employment) linked to recreation and leisure travel spending.

Table 6. Income and employment southwest Idaho linked to recreation and leisure travelers from all origins.

Economic Sector	Total Income	Income Linked	Percent Linked[1]	Total Employment	Employment Linked	Percent Linked[1]
	----	(Millions 1987 $'s)	---			
Agriculture	$341.1	$0.9	0.27	4907.1	9.1	0.19
Mining	21.6	0.1	0.58	257.3	1.1	0.43
Construction	201.6	5.0	2.47	5190.6	127.4	2.46
Food Manufacturing	271.5	3.4	1.24	6019.6	63.9	1.06
Apparel Manufacturing	2.1	0.1	4.01	61.7	2.5	4.04
Logging & Wood Products	153.0	0.7	0.44	3522.2	18.8	0.53
Printing & News	57.6	1.7	3.02	1364.9	41.0	3.00
Concrete Products	15.1	0.4	2.58	301.0	7.7	2.56
Misc. Manufacturing	428.5	3.5	0.82	9343.2	76.1	0.81
Transportation	224.5	11.0	4.88	4215.7	204.7	4.86
Communications	149.4	3.8	2.52	1732.0	42.1	2.43
Utilities	241.7	3.3	1.38	1593.3	22.0	1.38
Wholesale Trade	503.5	8.8	1.75	8530.5	148.7	1.74
Retail Trade	686.2	25.2	3.67	24540.2	896.2	3.65
Finance, Insurance, R. & E.	608.1	16.4	2.70	7725.5	226.3	2.93
Hotels & Motels	18.1	10.7	59.15	957.5	563.8	58.89
Consumer Services	97.2	6.8	7.02	2079.8	129.6	6.23
Business & Legal Services	213.8	7.6	3.56	4377.9	155.2	3.54
Eating & Drinking	126.9	10.2	8.00	7283.9	580.4	7.97
Amusements	43.9	2.4	5.57	1168.1	64.8	5.55
Hospitals & Health Services	261.3	6.7	2.57	10456.1	268.0	2.56
State & Local Government	414.1	11.2	2.69	21584.8	579.1	2.68
Federal Government	303.6	0.2	0.06	11480.3	12.1	0.11
TOTAL	$5,384.4	$140.1	2.39	138,693.0	4,240.6	2.82

[1]Percent of income (or employment) linked to leisure-travel spending for each economic sector.

Table 7. Income and employment southwest Idaho linked to recreation and leisure travelers from all origins.

Economic Sector	Total Income	Income Linked	Percent Linked[1]	Total Employment	Employment Linked	Percent Linked[1]
	----	(Millions 1987 $'s)	---			
Agriculture	$967.0	$0.5	0.06	9,732.6	9.5	0.10
Mining	8.0	0.0	0.51	131.6	0.6	0.49
Construction	167.9	4.4	2.63	5,178.3	137.0	2.65
Food Manufacturing	608.0	3.8	0.63	11,132.1	53.6	0.48
Apparel Manufacturing	0.7	0.0	5.18	30.5	1.4	4.56
Logging & Wood Products	111.3	0.4	0.35	2,367.1	9.5	0.40
Printing & News	44.9	1.3	2.79	1,169.5	32.9	2.82
Concrete Products	16.5	0.4	2.49	344.3	8.6	2.50
Misc. Manufacturing	322.8	2.3	0.72	5,092.6	44.2	0.87
Transportation	143.6	12.6	8.78	3,000.6	258.0	8.60
Communications	91.4	3.5	3.87	1,251.7	45.5	3.63
Utilities	170.6	4.3	2.51	1,083.3	27.5	2.54
Wholesale Trade	454.3	9.5	2.10	10,150.0	218.0	2.15
Retail Trade	466.5	19.9	4.26	22,380.6	968.3	4.33
Finance, Insurance, R. & E.	407.0	11.3	2.77	5,333.9	149.0	2.79
Hotels & Motels	33.3	12.0	36.14	2,058.2	752.3	36.55
Consumer Services	123.6	6.6	5.35	2,616.3	145.2	5.55
Business & Legal Services	370.2	8.9	2.41	7,634.1	191.1	2.50
Eating & Drinking	110.9	13.7	12.36	6,059.0	759.1	12.53
Amusements	53.3	3.3	6.13	1,555.2	97.2	6.25
Hospitals & Health Services	272.9	7.3	2.66	11,166.2	306.7	2.75
State & Local Government	436.1	14.4	3.30	24,411.0	814.5	3.34
Federal Government	194.2	0.0	0.00	7,747.0	0.1	0.00
TOTAL	$5,575.4	$140.6	2.52	141,625.6	5,029.9	3.55

[1]Percent of individual industry income (or employment) linked to recreation and leisure travel spending.

Table 8. Income in north Idaho linked to recreation and leisure travelers from all origins.

	Income Linked to Leisure Tourism (Millions 1987 $'s)	Percent of Total Leisure Travel Income[1]
Agriculture	$1.2	0.69
Mining	0.1	0.07
Construction	5.2	3.10
Food Manufacturing	2.7	1.57
Apparel Manufacturing	0.4	0.23
Logging & Wood Products	1.2	0.69
Printing & News	2.2	1.32
Concrete Products	0.4	0.24
Misc. Manufacturing	2.7	1.58
Transportation	5.7	3.36
Communications	5.1	3.02
Utilities	4.4	2.61
Wholesale Trade	10.0	5.89
Retail Trade	23.8	14.11
Finance, Insurance, R.& E.	15.6	9.25
Hotels & Motels	15.3	9.03
Consumer Services	9.3	5.52
Business & Legal Services	9.0	5.34
Eating & Drinking	16.7	9.86
Amusements	5.3	3.16
Hospitals & Health Services	11.3	6.69
State & Local Government	21.1	12.46
Federal Government	0.4	0.21
TOTAL	$169.0	100.00

[1]Percent of the total income linked to leisure-travel spending attributable to each economic sector.

Table 9. Income in southwestern Idaho linked to recreation and leisure travel, from all origins.

	Income Linked to Leisure Tourism (Millions 1987 $'s)	Percent of Total Leisure Travel Income[1]
Agriculture	$0.9	0.67
Mining	0.1	0.09
Construction	5.0	3.55
Food Manufacturing	3.4	2.41
Apparel Manufacturing	0.1	0.06
Logging & Wood Products	0.7	0.48
Printing & News	1.7	1.24
Concrete Products	0.4	0.28
Misc. Manufacturing	3.5	2.50
Transportation	11.0	7.82
Communications	3.8	2.69
Utilities	3.3	2.39
Wholesale Trade	8.8	6.30
Retail Trade	25.2	17.97
Finance, Insurance, R. & E.	16.4	11.74
Hotels & Motels	10.7	7.63
Consumer Services	6.8	4.87
Business & Legal Services	7.6	5.43
Eating & Drinking	10.2	7.25
Amusements	2.4	1.75
Hospitals & Health Services	6.7	4.80
State & Local Government	11.2	7.97
Federal Government	0.2	0.13
TOTAL	$140.1	100.00

[1]Percent of the total income linked to leisure-travel spending attributable to each economic sector.

Table 10. Income in southeast Idaho linked to recreation and leisure travelers from all origins.

	Income Linked to Leisure Tourism (Millions 1987 $'s)	Percent of Total Leisure Travel Income[1]
Agriculture	$0.5	0.39
Mining	0.0	0.03
Construction	4.4	3.14
Food Manufacturing	3.8	2.72
Apparel Manufacturing	0.0	0.03
Logging & Wood Products	0.4	0.28
Printing & News	1.3	0.89
Concrete Products	0.4	0.29
Misc. Manufacturing	2.3	1.64
Transportation	12.6	8.97
Communications	3.5	2.52
Utilities	4.3	3.04
Wholesale Trade	9.5	6.79
Retail Trade	19.9	14.14
Finance, Insurance, R. & E.	11.3	8.02
Hotels & Motels	12.0	8.57
Consumer Services	6.6	4.70
Business & Legal Services	8.9	6.35
Eating & Drinking	13.7	9.75
Amusements	3.3	2.32
Hospitals & Health Services	7.3	5.17
State & Local Government	14.4	10.23
Federal Government	0.0	0.00
TOTAL	$140.6	100.00

[1]Percent of the total income linked to leisure-travel spending attributable to each economic sector.

Table 11. Income and employment in north Idaho linked to recreation and leisure travelers from outside Idaho.

Economic Sector	Total Income	Income Linked	Percent Linked[1]	Total Employment	Employment Linked	Percent Linked[1]
	----	(Millions 1987 $'s)	---			
Agriculture	$103.4	$0.8	0.78	1363.9	12.1	0.88
Mining	57.1	0.1	0.15	945.0	1.4	0.15
Construction	91.7	3.8	4.09	2348.7	96.2	4.10
Food Manufacturing	17.4	1.8	10.38	350.4	35.5	10.14
Apparel Manufacturing	7.7	0.3	3.67	255.3	9.6	3.78
Logging & Wood Products	532.5	0.8	0.16	9746.3	14.3	0.15
Printing & News	30.2	1.6	5.31	710.6	37.7	5.31
Concrete Product	7.9	0.3	3.63	156.9	5.7	3.64
Misc. Manufacturing	117.0	2.0	1.68	2514.5	45.5	1.81
Transportation	77.8	4.3	5.54	1453.9	80.6	5.54
Communications	90.4	3.7	4.14	1010.1	41.9	4.15
Utilities	90.2	3.2	3.56	591.6	21.1	3.56
Wholesale Trade	108.0	7.1	6.59	3013.2	198.7	6.59
Retail Trade	179.6	17.2	9.58	8919.9	855.5	9.59
Finance, Insurance, R. & E.	235.5	11.3	4.80	2563.3	122.3	4.77
Hotels & Motels	30.0	10.5	35.18	1580.1	556.4	35.22
Consumer Service	58.6	7.4	12.57	1280.9	180.9	14.12
Business & Legal	100.9	6.5	6.48	2056.1	133.3	6.48
Eating & Drinking	77.5	12.2	15.79	4425.1	699.3	15.80
Amusements	30.6	3.9	12.86	810.0	104.3	12.87
Hospitals & Health Services	161.5	8.2	5.05	6429.2	324.9	5.05
State & Local Government	309.0	15.0	4.84	16020.6	776.5	4.85
Federal Government	42.9	0.1	0.12	2743.3	3.4	0.12
TOTAL	$2,557.3	$122.1	4.77	71,288.9	4,357.2	6.11

[1]Percent of individual industry income (or employment) linked to recreation and leisure travel spending.

Table 12. Income and employment in north Idaho linked to recreation and leisure travelers from north Idaho.

Economic Sector	Total Income	Income Linked	Percent Linked[1]	Total Employment	Employment Linked	Percent Linked[1]
	----	(Millions 1987 $'s)	---			
Agriculture	$103.4	$0.3	0.29	1363.9	4.6	0.33
Mining	57.1	0.0	0.04	945.0	0.4	0.04
Construction	91.7	1.0	1.13	2348.7	26.5	1.13
Food Manufacturing	17.4	0.6	3.67	350.4	12.3	3.52
Apparel Manufacturing	7.7	0.1	0.97	255.3	2.6	1.00
Logging & Wood Products	532.5	0.2	0.04	9746.3	3.9	0.04
Printing & News	30.2	0.4	1.48	710.6	10.5	1.48
Concrete Product	7.9	0.1	0.96	156.9	1.5	0.96
Misc. Manufacturing	117.0	0.5	0.42	2514.5	11.1	0.44
Transportation	77.8	1.0	1.24	1453.9	18.1	1.24
Communications	90.4	1.0	1.11	1010.1	11.3	1.12
Utilities	90.2	0.8	0.91	591.6	5.4	0.91
Wholesale Trade	108.0	2.0	1.83	3013.2	55.3	1.84
Retail Trade	179.6	4.5	2.51	8919.9	224.0	2.51
Finance, Insurance, R. & E.	235.5	3.0	1.27	2563.3	32.5	1.27
Hotels & Motels	30.0	2.9	9.83	1580.1	155.4	9.84
Consumer Service	58.6	1.3	2.23	1280.9	29.8	2.33
Business & Legal	100.9	1.8	1.78	2056.1	36.5	1.78
Eating & Drinking	77.5	2.8	3.64	4425.1	161.2	3.64
Amusements	30.6	1.1	3.59	810.0	29.1	3.59
Hospitals & Health Services	161.5	2.3	1.42	6429.2	91.2	1.42
State & Local Government	309.0	4.3	1.38	16020.6	222.0	1.39
Federal Government	42.9	0.3	0.70	2743.3	19.2	0.70
TOTAL	$2,557.3	$32.4	1.27	71,288.9	1,164.4	1.63

[1]Percent of individual industry income (or employment) linked to recreation and leisure travel spending.

Table 13. Income and employment in north Idaho linked to recreation and leisure travelers from southwest Idaho.

Economic Sector	Total Income	Income Linked	Percent Linked[1]	Total Employment	Employment Linked	Percent Linked[1]
	---- (Millions 1987 $'s) ---					
Agriculture	$103.4	$0.0	0.04	1363.9	0.6	0.04
Mining	57.1	0.0	0.01	945.0	0.1	0.01
Construction	91.7	0.3	0.35	2348.7	8.2	0.35
Food Manufacturing	17.4	0.2	0.88	350.4	3.0	0.86
Apparel Manufacturing	7.7	0.0	0.33	255.3	0.9	0.34
Logging & Wood Products	532.5	0.1	0.01	9746.3	1.2	0.01
Printing & News	30.2	0.1	0.42	710.6	3.0	0.42
Concrete Product	7.9	0.0	0.31	156.9	0.5	0.31
Misc. Manufacturing	117.0	0.2	0.13	2514.5	3.6	0.14
Transportation	77.8	0.3	0.38	1453.9	5.5	0.38
Communications	90.4	0.3	0.29	1010.1	2.9	0.29
Utilities	90.2	0.3	0.30	591.6	1.8	0.30
Wholesale Trade	108.0	0.6	0.58	3013.2	17.5	0.58
Retail Trade	179.6	1.6	0.89	8919.9	79.4	0.89
Finance, Insurance, R. & E.	235.5	1.0	0.42	2563.3	10.6	0.41
Hotels & Motels	30.0	1.2	4.05	1580.1	64.1	4.06
Consumer Service	58.6	0.4	0.64	1280.9	7.3	0.57
Business & Legal Services	100.9	0.5	0.49	2056.1	10.2	0.49
Eating & Drinking	77.5	1.2	1.60	4425.1	71.0	1.60
Amusements	30.6	0.2	0.79	810.0	6.4	0.80
Hospitals & Health	161.5	0.6	0.38	6429.2	24.6	0.38
State & Local Government	309.0	1.3	0.41	16020.6	65.1	0.41
Federal Government	42.9	0.0	0.00	2743.3	0.0	0.00
TOTAL	$2,557.3	$10.4	0.41	71,288.9	387.6	0.54

[1]Percent of individual industry income (or employment) linked to recreation and leisure travel spending.

Table 14. Income and employment in north Idaho linked to recreation and leisure travelers from southeast Idaho.

Economic Sector	Total Income	Income Linked	Percent Linked[1]	Total Employment	Employment Linked	Percent Linked[1]
	----	(Millions 1987 $'s)	---			
Agriculture	$103.4	$0.0	0.02	1363.9	0.2	0.02
Mining	57.1	0.0	0.01	945.0	0.0	0.01
Construction	91.7	0.1	0.15	2348.7	3.4	0.15
Food Manufacturing	17.4	0.1	0.33	350.4	1.1	0.32
Apparel Manufacturing	7.7	0.0	0.14	255.3	0.4	0.14
Logging & Wood Products	532.5	0.0	0.01	9746.3	0.5	0.00
Printing & News	30.2	0.1	0.17	710.6	1.2	0.17
Concrete Product	7.9	0.0	0.13	156.9	0.2	0.13
Misc. Manufacturing	117.0	0.1	0.05	2514.5	1.3	0.05
Transportation	77.8	0.1	0.15	1453.9	2.2	0.15
Communications	90.4	0.1	0.12	1010.1	1.2	0.12
Utilities	90.2	0.1	0.12	591.6	0.7	0.12
Wholesale Trade	108.0	0.2	0.21	3013.2	6.4	0.21
Retail Trade	179.6	0.5	0.30	8919.9	26.8	0.30
Finance, Insurance, R. & E.	235.5	0.4	0.16	2563.3	4.2	0.16
Hotels & Motels	30.0	0.6	1.87	1580.1	29.5	1.87
Consumer Service	58.6	0.3	0.48	1280.9	4.8	0.37
Business & Legal Services	100.9	0.2	0.19	2056.1	3.9	0.19
Eating & Drinking	77.5	0.4	0.47	4425.1	20.7	0.47
Amusements	30.6	0.1	0.23	810.0	1.8	0.23
Hospitals & Health Services	161.5	0.2	0.15	6429.2	9.7	0.15
State & Local Government	309.0	0.6	0.18	16020.6	29.1	0.18
Federal Government	42.9	0.0	0.00	2743.3	0.0	0.00
TOTAL	$2,557.3	$4.1	0.16	71,288.9	149.3	0.21

[1]Percent of individual industry income (or employment) linked to recreation and leisure travel spending.

Table 15. Income in north Idaho linked to recreation and leisure travelers from outside Idaho.

	Income Linked to Leisure Tourism (Millions 1987 $'s)	Percent of Total Leisure Travel Income[1]
Agriculture	0.8	0.66
Mining	0.1	0.07
Construction	3.8	3.07
Food Manufacturing	1.8	1.48
Apparel Manufacturing	0.3	0.23
Logging & Wood Products	0.8	0.69
Printing & News	1.6	1.31
Concrete Products	0.3	0.24
Misc. Manufacturing	2.0	1.61
Transportation	4.3	3.53
Communications	3.7	3.06
Utilities	3.2	2.63
Wholesale Trade	7.1	5.83
Retail Trade	17.2	14.09
Finance, Insurance, R. & E.	11.3	9.25
Hotels & Motels	10.5	8.63
Consumer Services	7.4	6.03
Business & Legal Services	6.5	5.35
Eating & Drinking	12.2	10.02
Amusements	3.9	3.23
Hospitals & Health Services	8.2	6.68
State & Local Government	15.0	12.25
Federal Government	0.1	0.04
TOTAL	$122.1	100.00

[1]Percent of total income linked to leisure-travel spending attributable to each economic sector.

Table 16. Income in north Idaho linked to recreation and leisure travelers from north Idaho.

	Income Linked to Leisure Tourism (Millions 1987 $'s)	Percent of Total Leisure Travel Income[1]
Agriculture	$0.3	0.92
Mining	0.0	0.07
Construction	1.0	3.19
Food Manufacturing	0.6	1.97
Apparel Manufacturing	0.1	0.23
Logging & Wood Products	0.2	0.71
Printing & News	0.4	1.38
Concrete Products	0.1	0.24
Misc. Manufacturing	0.5	1.52
Transportation	1.0	2.98
Communications	1.0	3.10
Utilities	0.8	2.53
Wholesale Trade	2.0	6.12
Retail Trade	4.5	13.90
Finance, Insurance, R. & E.	3.0	9.22
Hotels & Motels	2.9	9.09
Consumer Services	1.3	4.03
Business & Legal Services	1.8	5.53
Eating & Drinking	2.8	8.71
Amusements	1.1	3.39
Hospitals & Health Services	2.3	7.07
State & Local Government	4.3	13.20
Federal Government	0.3	0.92
TOTAL	$32.4	100.00

[1]Percent of the total income linked to leisure-travel spending attributable to each economic sector.

Table 17. Income in north Idaho linked to recreation and leisure travelers from southwest Idaho.

	Income Linked to Leisure Tourism (Millions 1987 $'s)	Percent of Total Leisure Travel Income[1]
Agriculture	$0.0	0.41
Mining	0.0	0.07
Construction	0.3	3.07
Food Manufacturing	0.2	1.47
Apparel Manufacturing	0.0	0.24
Logging & Wood Products	0.1	0.68
Printing & News	0.1	1.23
Concrete Products	0.0	0.23
Misc. Manufacturing	0.2	1.50
Transportation	0.3	2.81
Communications	0.3	2.54
Utilities	0.3	2.62
Wholesale Trade	0.6	6.03
Retail Trade	1.6	15.35
Finance, Insurance, R. & E.	1.0	9.39
Hotels & Motels	1.2	11.67
Consumer Services	0.4	3.63
Business & Legal Services	0.5	4.79
Eating & Drinking	1.2	11.94
Amusements	0.2	2.34
Hospitals & Health Services	0.6	5.94
State & Local Government	1.3	12.05
Federal Government	0.0	0.00
TOTAL	$10.4	100.00

[1]Percent of the total income linked to leisure-travel spending attributable to each economic sector.