

Washington State
Travel Impacts & Visitor Volume
2010 - 2018p

May 2019

Prepared for the

Washington Tourism Alliance

Snohomish County County Travel Impacts and Visitor Volume

Visitor Spending Impacts

Amount of Visitor Spending that supports 1 Job	\$98,473
Employee Earnings generated by \$100 Visitor Spending	\$30
Local Tax Revenues generated by \$100 Visitor Spending	\$3.38

Visitor Volume

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$81,148
Additional employment if each resident household encouraged one additional overnight visitor	824

Visitor Shares

Travel Share of Total Employment (2017)*	2.7 %
Visitor Share of Taxable Sales (2017)**	4.7 %
Overnight Visitor Share (2018p)***	2.7 %

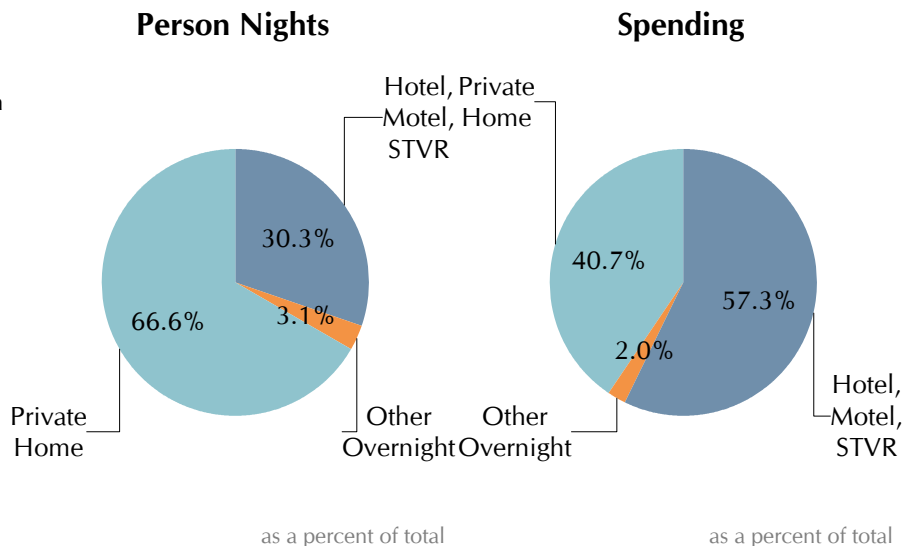
Overnight Visitor Spending and Volume

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Annual Overnight Visitor Days divided by (Resident Population)

*365.

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging typically have the greatest economic impact. There is substantial variation among destinations, however. Most rural and suburban areas have high shares of private home visitation. Urban areas tend to have greater shares of hotel/motel stays.



	Person Trips (000)	Person Nights (000)	Visitor Spending (\$Millions)
Hotel, Motel, STVR	1,170.7	2,469.3	441.8
Private Home	1,654.0	5,422.1	313.5
Other Overnight	88.0	253.1	15.7
All Overnight	2,912.7	8,144.5	771.1

Note: Person Trips and Person Nights are in Thousands. Visitor Spending is in \$Millions. Details may not round to total due to rounding

Snohomish County Direct Travel Impacts, 2010-2018p

							Ave. Annual Chg.	
Spending	2010	2012	2014	2016	2017	2018	17-18	10-18
Total (Current \$)	822.5	897.1	989.0	1,036.8	1,101.6	1,167.2	6.0%	4.5%
Other	80.7	97.1	94.3	77.8	90.5	102.1	12.9%	3.0%
Visitor	741.8	800.0	894.8	959.0	1,011.2	1,065.1	5.3%	4.6%
Non-transportation	613.2	658.6	743.2	811.4	850.5	890.2	4.7%	4.8%
Transportation	128.6	141.4	151.6	147.6	160.7	174.9	8.9%	3.9%
Earnings								
Earnings (Current \$)	208.8	231.6	256.6	283.1	304.4	327.1	7.5%	5.8%
Employment								
Employment	9,510	9,850	10,370	10,610	10,740	11,050	2.9%	1.9%
Tax Revenue								
Total (Current \$)	77.7	83.7	93.7	105.3	109.5	113.0	3.2%	4.8%
Local Tax Receipts	24.2	27.2	30.8	34.3	35.1	36.0	2.4%	5.1%
Visitor	14.7	17.1	19.9	21.7	22.7	23.6	4.0%	6.1%
Business or Employee	9.6	10.1	11.0	12.6	12.4	12.4	-0.4%	3.3%
State Tax Receipts	53.4	56.6	62.9	71.0	74.4	77.0	3.6%	4.7%
Visitor	41.6	43.9	48.7	54.5	57.8	60.3	4.3%	4.7%
Business or Employee	11.8	12.7	14.2	16.5	16.6	16.7	1.2%	4.5%

Other spending includes resident air travel, travel arrangement and reservation services, and convention and trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental, other local ground transportation and one-way fares.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes, sales taxes, auto rental taxes and airport passenger facility charges paid by visitors, and the property tax payments and sales tax payments attributable to the travel industry income of employees and businesses.

State tax revenue includes lodging, sales and motor fuel tax payments of visitors, and the income tax and sales tax payments attributable to the travel industry income of businesses and employees.

Federal tax revenue includes motor fuel excise taxes and airline ticket taxes paid by visitors, and the payroll and income taxes attributable to the travel industry income of employees and businesses.

Snohomish County

Travel Impacts, 2010-2018p

Total Direct Travel Spending (\$Million)

	2010	2012	2013	2014	2015	2016	2017	2018
Destination Spending	741.8	800.0	838.4	894.8	926.5	959.0	1,011.2	1,065.1
Other Travel*	80.7	97.1	95.7	94.3	78.3	77.8	90.5	102.1
Total	822.5	897.1	934.0	989.0	1,004.9	1,036.8	1,101.6	1,167.2

Visitor Spending By Commodity Purchased (\$Million)

	2010	2012	2013	2014	2015	2016	2017	2018
Accommodations	90.0	105.8	112.3	128.9	139.4	143.3	149.6	157.0
Food Service	235.5	253.0	268.9	288.4	305.9	323.4	344.9	366.4
Food Stores	50.4	54.4	56.8	60.5	63.1	63.8	65.4	67.3
Local Tran. & Gas	128.6	141.4	145.6	151.6	144.9	147.6	160.7	174.9
Arts, Ent. & Rec.	115.7	119.5	124.2	130.2	134.6	139.5	145.2	150.5
Retail Sales	121.6	126.0	130.5	135.2	138.6	141.3	145.4	149.2
Total	741.8	800.0	838.4	894.8	926.5	959.0	1,011.2	1,065.1

Industry Earnings Generated by Travel Spending (\$Million)

	2010	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	110.0	129.0	133.8	141.4	150.2	157.4	170.8	182.3
Arts, Ent. & Rec.	44.8	47.3	51.9	51.8	53.3	55.2	57.5	61.6
Retail**	24.3	25.2	27.3	29.1	31.2	31.6	33.9	35.8
Ground Tran.	24.0	23.9	24.9	27.0	28.6	29.9	32.8	37.4
Other Travel*	5.7	6.2	6.9	7.3	8.1	8.9	9.5	10.0
Total	208.8	231.6	244.9	256.6	271.3	283.1	304.4	327.1

Industry Employment Generated by Travel Spending (Jobs)

	2010	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	4,670	5,080	5,110	5,460	5,570	5,630	5,630	5,690
Arts, Ent. & Rec.	2,860	2,830	2,880	2,790	2,650	2,820	2,880	3,090
Retail**	950	950	1,010	1,050	1,090	1,090	1,120	1,130
Ground Tran.	840	800	830	870	880	850	880	910
Other Travel*	200	190	200	200	210	230	230	230
Total	9,510	9,850	10,030	10,370	10,410	10,610	10,740	11,050

Tax Receipts Generated by Travel Spending (\$Million)

	2010	2012	2013	2014	2015	2016	2017	2018
Local Tax Receipts	24.2	27.2	28.6	30.8	32.9	34.3	35.1	36.0
Visitor	14.7	17.1	18.1	19.9	21.0	21.7	22.7	23.6
Business or Employee	9.6	10.1	10.5	11.0	11.9	12.6	12.4	12.4
State Tax Receipts	53.4	56.6	59.4	62.9	66.6	71.0	74.4	77.0
Visitor	41.6	43.9	46.0	48.7	51.2	54.5	57.8	60.3
Business or Employee	11.8	12.7	13.4	14.2	15.4	16.5	16.6	16.7
Total Local & State Receipts	77.7	83.7	88.1	93.7	99.4	105.3	109.5	113.0

Details may not add to total due to rounding. * Other Travel includes ground transportation and air travel impacts for travel to other Washington visitor destinations and travel arrangement services. ** Retail includes gasoline. Federal tax receipts not included.

Snohomish County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2010-2018p

	2010	2012	2013	2014	2015	2016	2017	2018
Total Destination Spending	741.8	800.0	838.4	894.8	926.5	959.0	1,011.2	1,065.1
All Overnight	525.7	570.7	599.4	644.4	670.4	693.9	731.6	771.1
Hotel, Motel, STVR*	271.9	304.8	324.0	359.3	380.8	394.2	417.1	441.8
Private Home	241.4	252.5	261.8	271.1	275.3	285.1	299.3	313.5
Other Overnight	12.3	13.4	13.6	14.0	14.2	14.6	15.1	15.7
Day Travel	216.1	229.3	238.9	250.4	256.2	265.0	279.6	294.1

Average Expenditures for Overnight Visitors, 2018p

	Travel Party		Person		Party Size	Length of Stay (Nights)
	Day	Trip	Day	Trip		
Hotel, Motel, STVR*	\$377	\$805	\$179	\$377	2.1	2.1
Private Home	\$113	\$383	\$58	\$190	2.0	3.4
Other Overnight	\$153	\$440	\$62	\$178	2.5	2.9
All Overnight	\$190	\$550	\$95	\$265	2.1	2.9

Overnight Visitor Volume, 2016-2018p

	Person-Nights (000)			Party-Nights (000)		
	2016	2017	2018	2016	2017	2018
Hotel, Motel, STVR*	2,297	2,392	2,469	1,082	1,129	1,171
Private Home	5,225	5,345	5,422	2,660	2,728	2,781
Other Overnight	246	250	253	100	101	103
All Overnight	7,768	7,987	8,145	3,842	3,958	4,055

	Person-Trips (000)			Party-Trips (000)		
	2016	2017	2018	2016	2017	2018
Hotel, Motel, STVR*	1,089	1,134	1,171	507	529	549
Private Home	1,594	1,631	1,654	784	804	818
Other Overnight	86	87	88	35	35	36
All Overnight	2,768	2,851	2,913	1,326	1,368	1,403

"Hotel, Motel, STVR*" category includes all lodging where a lodging tax is collected except campgrounds. "Other Overnight" category includes campgrounds and vacation homes.