

The Economic Impact of Travel

Seattle Southside

2025 Preliminary Estimates

March, 2026

PREPARED FOR
Seattle Southside RTA

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The Economic Impact of Travel in Seattle Southside, Washington

2025 Preliminary Estimates

Seattle Southside RTA

3/18/2026

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Photo by Seattle Southside RTA

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Seattle Southside, WA

2025p

Direct Travel Impacts

Summary, 2025p

Seattle Southside—which includes SeaTac, Tukwila, and Des Moines—offers convenient access to major attractions like the Museum of Flight, scenic waterfront parks, and diverse global cuisine, all just minutes from Sea-Tac Airport. In 2025, overnight visitor volume was up 2.8%, which ultimately contributed to a 1.8% increase in visitor spending compared to the previous year.

- **Overnight Visitor volume** (person-trips) decreased 2.8% from 1,894,900 visitors in 2024 to 1,842,600 visitors in 2025.
- **Travel-related spending** was \$985.1 million in 2025, a 1.8% decrease compared to the previous year.
- **Direct earnings** (wages, benefits, and proprietor income generated by travel) grew 5.1%, from \$281.9 million in 2024 to \$296.2 million in 2025.
- **Direct travel generated employment** gained approximately 50 jobs in 2025, a 1.0% increase compared to the previous year.
- **Local tax receipts** generated by visitor spending totaled \$64.1 million in 2025, a 1.5% decrease compared to 2024. In 2025, local tax revenue generated approximately \$2,003 per resident household.

In 2025, visitors spent **\$985.1 million, a 1.8% decrease** compared to the previous year.



Photo by Seattle Southside RTA

Note: This report describes the travel impacts within Seattle Southside. These estimates are subject to revision if more comprehensive data becomes available.

Direct Travel Impacts

Historical Trend Tables

Direct Impact Summary

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR* 16-25
Spending (\$Millions)												
Visitor	684.3	713.9	761.9	779.5	357.9	625.2	920.7	968.6	992.4	974.9	-1.8%	4.0%
Transportation	112.3	118.4	127.3	129.6	62.1	133.4	191.2	186.7	186.7	188.1	0.8%	5.9%
Non-Transportation	572.1	595.4	634.7	649.9	295.8	491.7	729.5	781.9	805.7	786.8	-2.4%	3.6%
Other	6.2	7.3	8.4	8.4	5.6	8.8	11.3	11.1	10.3	10.2	-0.3%	5.8%
Total	690.5	721.2	770.3	787.9	363.6	633.9	932.0	979.7	1,002.7	985.1	-1.8%	4.0%
Earnings (\$Millions)												
Earnings	203.2	211.8	230.0	240.3	157.3	220.1	265.2	269.1	281.9	296.2	5.1%	4.3%
Employment (Jobs)												
Employment	4,900	4,940	5,110	5,100	3,210	4,080	4,820	5,140	5,240	5,290	1.0%	0.9%
Tax Revenue (\$Millions)												
Local	44.4	45.6	47.6	47.8	23.7	42.2	62.1	64.1	65.0	64.1	-1.5%	4.2%
State	48.0	49.5	52.0	52.7	27.3	47.4	60.1	62.0	63.6	63.1	-0.8%	3.1%
Total	92.4	95.1	99.6	100.5	51.1	89.7	122.2	126.1	128.6	127.1	-1.1%	3.6%

Note: Employment rounded to the nearest 10.

*CAGR stands for Compound Annual Growth Rate and shows the average rate of growth each year over a certain period.

Direct Travel Impacts

Historical Trend Tables

Direct Spending Summary

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR* 16-25
Spending (\$Millions)												
Visitor	684.3	713.9	761.9	779.5	357.9	625.2	920.7	968.6	992.4	974.9	-1.8%	4.0%
Other	6.2	7.3	8.4	8.4	5.6	8.8	11.3	11.1	10.3	10.2	-0.3%	5.8%
Total	690.5	721.2	770.3	787.9	363.6	633.9	932.0	979.7	1,002.7	985.1	-1.8%	4.0%
Visitor Spending by Type of Traveler Accommodation (\$Millions)												
Hotel, Motel, STVR	640.6	668.7	714.2	730.4	321.8	576.4	862.0	906.3	927.8	907.9	-2.1%	4.0%
Private Home (VFR)	16.8	17.3	18.2	18.7	18.7	20.8	22.1	23.4	24.5	25.3	3.3%	4.7%
Seasonal Home (2nd Home)	0.5	0.5	0.5	0.5	0.5	0.5	0.6	0.6	0.6	0.6	1.9%	3.7%
Day Travel	25.0	25.9	27.5	28.4	16.0	25.9	34.4	36.6	37.9	39.4	3.9%	5.2%
Total	684.3	713.9	761.9	779.5	357.9	625.2	920.7	968.6	992.4	974.9	-1.8%	4.0%
Visitor Spending by Commodity Purchased (\$Millions)												
Accommodations	262.8	275.7	294.9	295.9	106.1	171.8	330.3	351.0	354.4	335.1	-5.4%	2.7%
Food Service	192.7	201.7	216.6	228.0	122.7	207.9	245.9	270.3	288.1	290.3	0.8%	4.7%
Food Stores	17.0	17.0	17.8	18.3	10.3	16.7	24.4	26.1	26.9	27.0	0.4%	5.3%
Arts, Ent. & Rec.	38.0	39.0	40.9	41.9	22.4	36.4	44.0	47.3	48.7	48.5	-0.5%	2.7%
Retail Sales	61.5	62.0	64.4	65.8	34.4	58.8	84.9	87.2	87.7	85.9	-2.0%	3.8%
Local Tran. & Gas	112.3	118.4	127.3	129.6	62.1	133.4	191.2	186.7	186.7	188.1	0.8%	5.9%
Total	684.3	713.9	761.9	779.5	357.9	625.2	920.7	968.6	992.4	974.9	-1.8%	4.0%

Note: Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

*CAGR stands for Compound Annual Growth Rate and shows the average rate of growth each year over a certain period.

For more information, see Glossary on page 17.



Direct Travel Impacts

Historical Trend Tables

Direct Impact Detail

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	% Chg. 24-25	CAGR* 16-25
Earnings (\$Millions)												
Accom. & Food Serv.	154.3	161.6	175.9	184.9	107.6	144.5	191.9	194.7	206.3	218.4	5.8%	3.9%
Arts, Ent. & Rec.	19.4	19.9	20.7	21.2	19.2	28.1	29.9	28.6	29.6	30.8	4.0%	5.3%
Retail**	11.6	11.8	12.8	13.1	9.6	14.7	14.4	16.6	16.1	16.4	1.9%	4.0%
Ground Trans. & Other Travel	17.9	18.6	20.6	21.1	20.9	32.7	29.0	29.2	29.8	30.6	2.8%	6.1%
Total	203.2	211.8	230.0	240.3	157.3	220.1	265.2	269.1	281.9	296.2	5.1%	4.3%
Employment (Jobs)												
Accom. & Food Serv.	3,670	3,710	3,870	3,870	2,280	2,810	3,460	3,680	3,750	3,800	1.3%	0.4%
Arts, Ent. & Rec.	460	450	470	460	390	550	610	630	660	660	0.0%	4.1%
Retail**	250	250	250	250	150	220	230	250	240	230	-4.2%	-0.9%
Ground Trans. & Other Travel	530	530	530	530	380	510	520	580	600	600	0.0%	1.4%
Total	4,900	4,940	5,110	5,100	3,210	4,080	4,820	5,140	5,240	5,290	1.0%	0.9%
Tax Revenue (\$Millions)												
Local	44.4	45.6	47.6	47.8	23.7	42.2	62.1	64.1	65.0	64.1	-1.5%	4.2%
State	48.0	49.5	52.0	52.7	27.3	47.4	60.1	62.0	63.6	63.1	-0.8%	3.1%
Total	92.4	95.1	99.6	100.5	51.1	89.7	122.2	126.1	128.6	127.1	-1.1%	3.6%

Note: Employment rounded to the nearest 10.

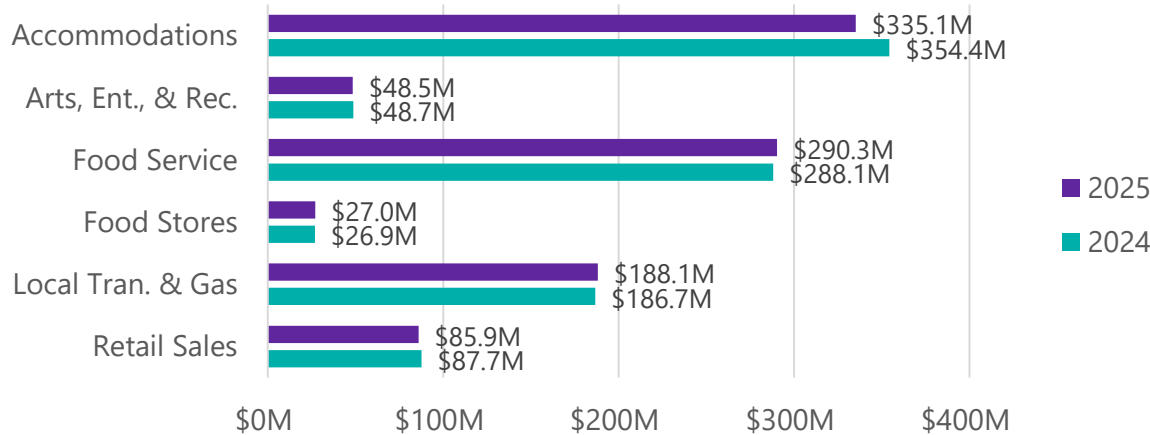
*CAGR stands for Compound Annual Growth Rate and shows the average rate of growth each year over a certain period.

**Retail includes gasoline station employment and earnings.

For more information, see Glossary on page 17.

Direct Spending

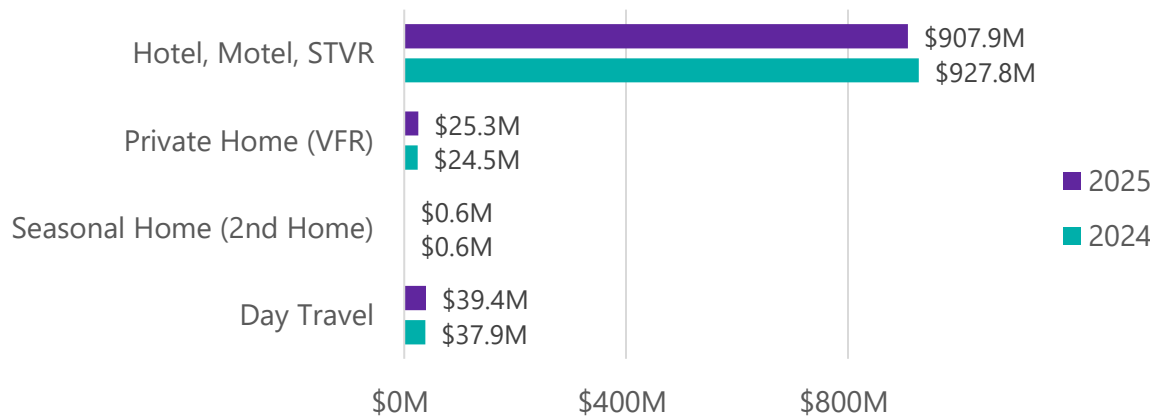
Visitor Spending by Commodity Purchased



Visitors spent \$335.1 million on accommodations in 2025, a **\$19.3 million or 5.4% decrease** compared to the previous year.

Sources: Dean Runyan Associates, OmniTrak Group, U.S. Energy Information Administration, U.S. Bureau of Transportation Statistics

Visitor Spending by Accommodation Type

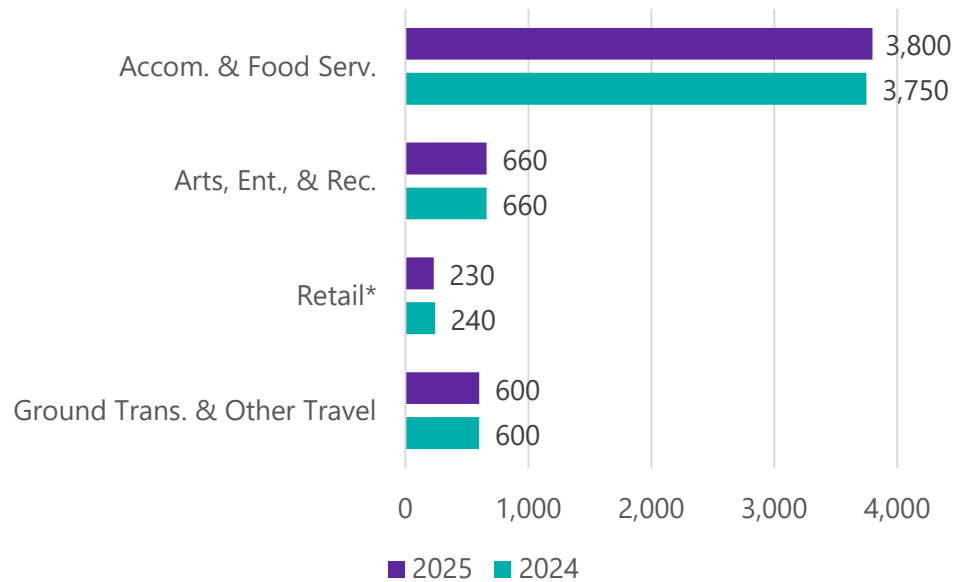


Visitors who stayed in a hotel, motel, or STVR contributed \$907.9 million of visitor spending, a **\$19.8 million or 2.1% decrease** compared to the previous year.

Sources: Dean Runyan Associates, OmniTrak Group, AirDNA, Smith Travel Research, U.S. Census Bureau

Direct Employment

Travel Industry Employment



Sources: Dean Runyan Associates, U.S. Bureau of Labor Statistics, U.S. Bureau of Economic Analysis
Note: Figures represent an annual average number of jobs rounded to the nearest 10.
 *Retail includes gasoline station employment.

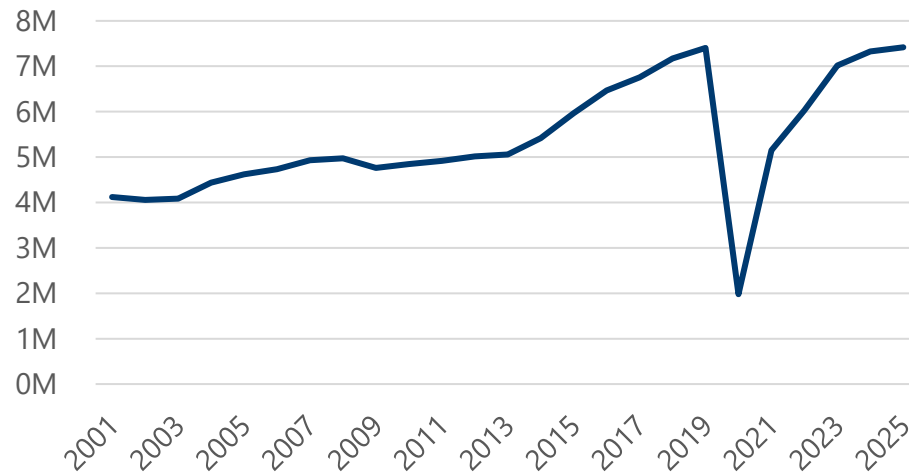


Photo by Seattle Southside RTA

The Accommodations and Food Services industry group gained **approximately 50 jobs in 2025; a 1.3% increase** compared to the previous year.

Overnight Visitor Volume

U.S. Air Carrier Visitor Arrivals

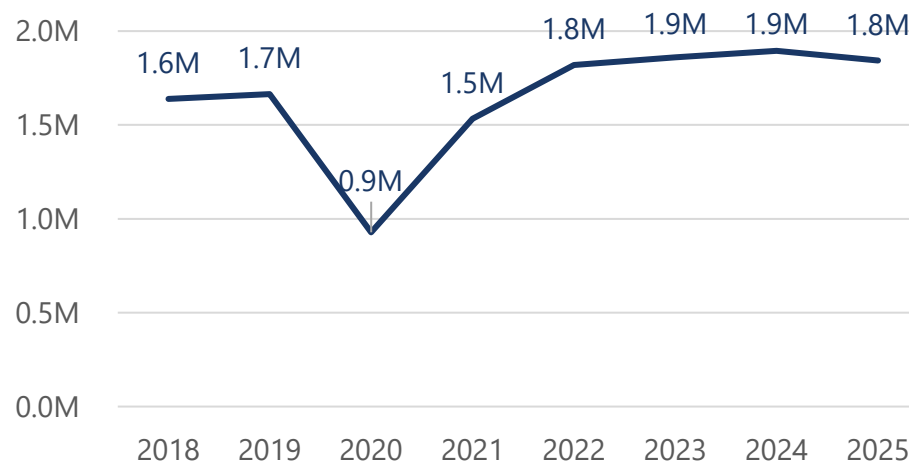


Sources: U.S. Bureau of Transportation Statistics, Dean Runyan Associates

Note: Air arrivals to the Seattle-Tacoma International Airport (SEA)

In 2025, approximately 7.4 million visitors flew into the Seattle-Tacoma International Airport (SEA), a **1.2% increase** compared to the previous year.

Overnight Visitor Volume

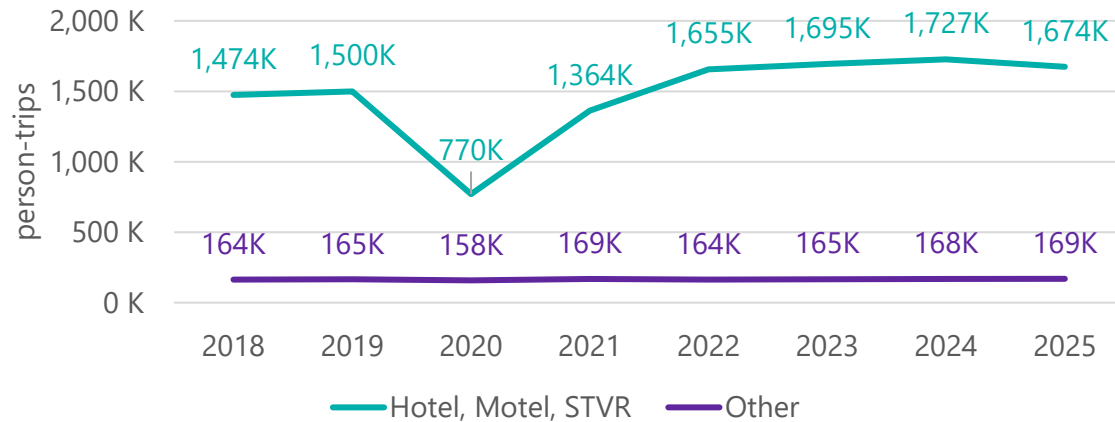


Sources: Seattle Southside RTA, NPS, Census Bureau, AirDNA, Dean Runyan Associates

Seattle Southside welcomed approximately **1.84 million** overnight visitors in 2025, a **2.8% decrease** compared to the previous year.

Overnight Visitor Volume

Visitor Volume



Approximately 1.67 million visitors stayed in a hotel, motel, or STVR in 2025, a **3.1% decrease** compared to the previous year.

Sources: Seattle Southside RTA, U.S. Census Bureau, AirDNA, Smith Travel Research, OmniTrak Group, Dean Runyan Associates

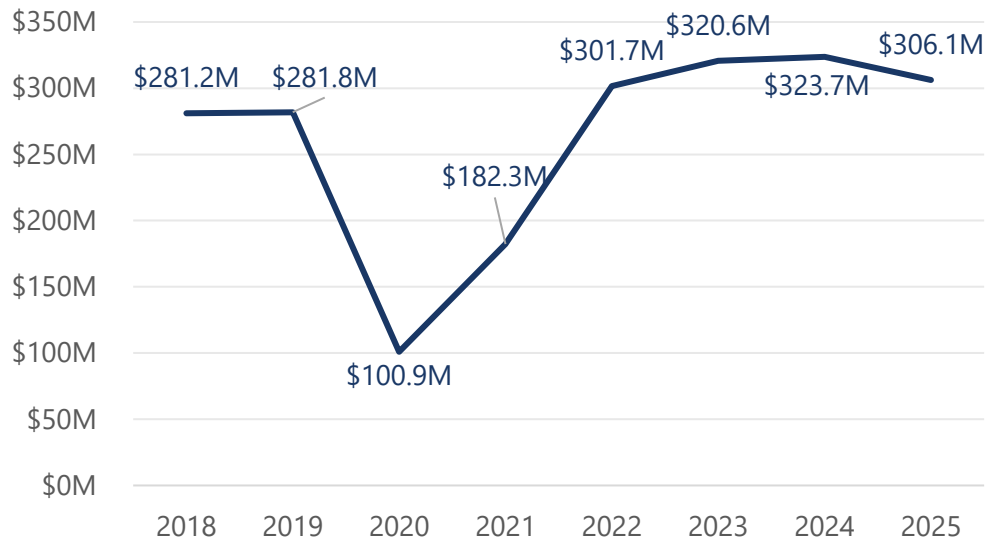
Visitor Nights and Trips

	Person			Party		
	2023	2024	2025	2023	2024	2025
Nights						
Hotel, Motel, STVR	3,977,100	4,051,200	3,926,400	1,930,600	1,966,600	1,906,000
Private Home (VFR)	560,500	572,100	575,500	254,800	260,100	261,600
Other Overnight	32,500	32,300	32,000	12,400	12,400	12,300
Total	4,570,100	4,655,600	4,534,000	2,197,800	2,239,000	2,179,900
Trips						
Hotel, Motel, STVR	1,695,300	1,726,800	1,673,700	822,900	838,300	812,500
Private Home (VFR)	153,700	156,900	157,800	69,900	71,300	71,700
Other Overnight	11,300	11,200	11,100	4,300	4,300	4,300
Total	1,860,200	1,894,900	1,842,600	897,100	913,900	888,500

Note: Estimates are rounded to the nearest hundred.

Overnight Visitor Details

Taxable Lodging Sales



Taxable lodging sales totaled \$306.1 million in 2025, a **\$17.6 million or 5.4% decrease** compared to the previous year.

Sources: Seattle Southside, Dean Runyan Associates

Overnight Trip Details

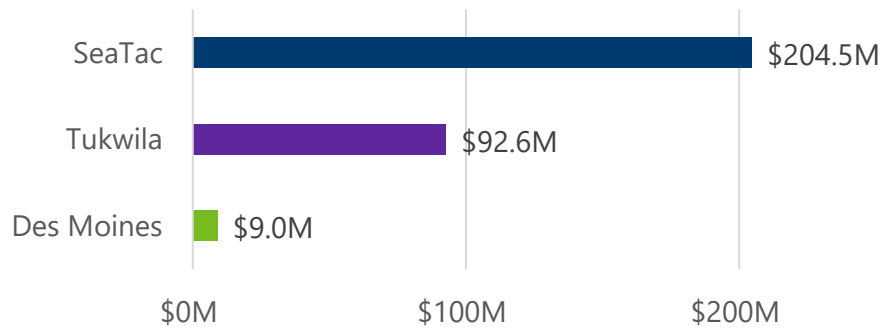
	Spending per Person		Spending per Party		Party Size	Length of Stay
	Day	Trip	Day	Trip		
Hotel, Motel, STVR	\$231	\$542	\$476	\$1,118	2.1	2.3
Private Home (VFR)	\$44	\$160	\$97	\$352	2.2	3.6
Other Overnight	\$71	\$206	\$186	\$536	2.6	2.9
All Overnight	\$206	\$508	\$429	\$1,053	2.1	2.5

On average, visitors who stayed in a hotel, motel, or STVR spent **\$231 per day and stayed approximately 2.3 days**.

Sources: U.S. Census Bureau, AirDNA, Smith Travel Research, OmniTrak Group, Dean Runyan Associates

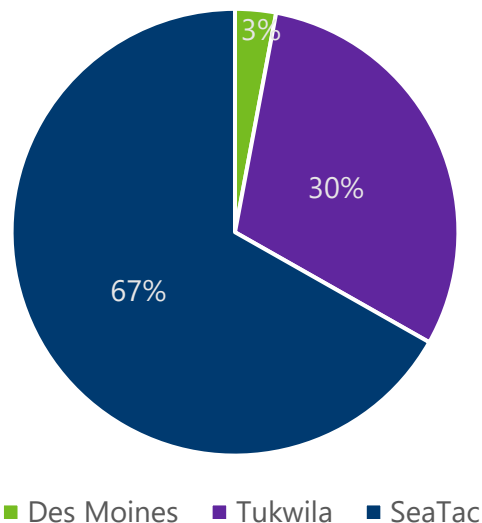
Community Impacts

Taxable Lodging sales, 2025p



SeaTac had the highest taxable lodging sales among Seattle Southside communities, generating \$204.5M in 2025.

Proportion of Taxable Lodging sales, 2025p



In 2025, SeaTac and Tukwila made up most Seattle Southside's taxable lodging sales generating 67% and 30% respectively.

Source: Washington Department of Revenue, U.S. Census Bureau

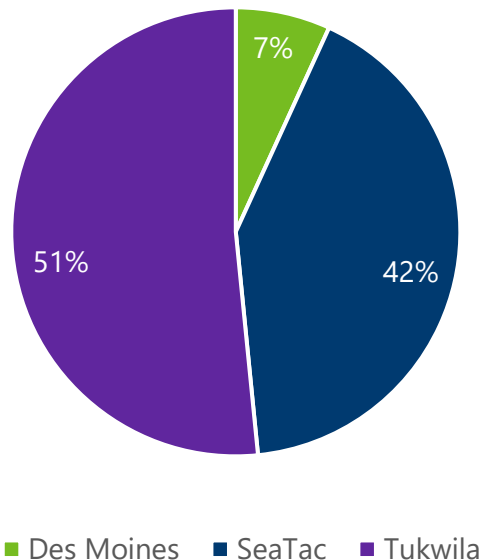
Community Impacts

Summary of Travel Impacts, 2025p

Community	Spending	Earnings	Employment	Local Tax	State Tax
Des Moines	\$67.2M	\$21.5M	390	\$3.3M	\$4.0M
SeaTac	\$409.8M	\$122.8M	2,140	\$20.0M	\$24.4M
Tukwila	\$508.1M	\$151.9M	2,770	\$24.8M	\$30.3M
Seattle Southside	\$985.1M	\$296.2M	5,290	\$48.1M	\$58.7M

Note: Visitors do not necessarily recognize geographic boundaries and may visit multiple places during their stay, because of this, the economic impacts should be interpreted as approximate estimates. The cities of SeaTac, Tukwila, and Des Moines make up Seattle Southside.

Proportion of Travel Related Spending, 2025p



Tukwila generated the largest proportion of travel related spending in Seattle Southside, contributing \$508.1 million or 51% of the regional total.

Glossary

Term	Definition
Accommodations	Overnight lodging for travelers, vacationers, and others. Paid accommodations include hotels, motels, STVRs, bed & breakfasts, RV resorts, and campgrounds. Unpaid accommodations include seasonal homes (2nd homes) and private home visiting friends or relatives (VFR)
Arts, Ent., Rec., & Gaming	Establishments that facilitate live performances or events, preserve exhibits and sites for public viewing, or facilitate recreational leisure-time activities. Examples include event venues, non-hotel casinos, and museums
Day Travel	Greater than 50 miles traveled non-routine to the destination
Destination Spending	Interchangeable with Visitor Spending. Direct spending made by visitors in a destination
Direct Earnings	Total after-tax net income for travel. Includes wages and salary disbursements, proprietor income, and other earned income or benefits
Direct Employment	Employment generated by direct spending; includes full time, part time, seasonal, and proprietors
Direct Spending	Expenditures made by consumers; a combination of Visitor Spending and Other Spending
Food Services	Establishments that prepare food and beverages for immediate consumption on premise or off-premises
Food Stores	Retail establishments that primarily sell food and beverage products
Hotel, Motel, STVR	Accommodation types that house transient lodging activity
Local Taxes	City and county taxes generated by travel spending
Local Trans. & Gas	Local transportation includes 1) transportation by taxi, limousine, rail, water, charter bus, urban transit, or interurban and rural bus system 2) rental of a passenger car or non-commercial truck, trailer, or RV 3) parking lots and garages. Gas includes establishments who primarily sell auto fuels and oils
Other Overnight	Combination of overnight visitors who stay in RV resorts, campgrounds, or 2nd homes
Other Spending	Spending by residents on travel arrangement services, or spending on convention activities
Private Home (VFR)	Personal residences used to host visiting friends and family overnight
Retail Sales	Establishments that sell goods to the public
Seasonal home (2nd home)	Homes under private ownership for personal use as a vacation property
State Taxes	State taxes generated by travel spending
STVR	Short Term Vacation Rental. Private and semi-private lodging rented by owners or property management companies (e.g. Airbnb, VRBO)
Visitor Spending	Direct spending made by visitors in a destination

Methodology

The direct travel impacts reported in this analysis were estimated using DRA's Regional Travel Impact Model (RTIM). First developed in 1985, this model estimates direct impacts at a local level without relying on annual survey research. The "bottom up" approach of the RTIM involves modeling of private and public data at the county level, ensuring that the final findings correspond closely with the various travel indicators available for each respective county. Results are then aggregated into regions and the state or disaggregated to the city level based on relevant indicators at these geographic levels. The result is a detailed profile of taxes, employment, wages, and spending that can be tracked consistently over time.

The economic impact associated with day visitors and overnight visitors is a primary breakout included in this report. Lodging tax data and survey data on visitor expenditures inform estimates of total spending associated with overnight visitors who stay in commercial lodging in the studied region. DRA maintains its own expenditure distribution database for each state we work in, with input from multiple major survey providers. The inventory of campgrounds is collected for commercial and public sites, and occupancy is modeled based on a representative subset of sites. Sales attributable to travelers staying in their second homes are calculated from inventories from the US Census and public information on average utilization rates. Visitation of friends and relatives (VFR) is generally stable across time and geography, the primary driver for a destination being the local resident population. Estimates of visitor spending related to day travel can be driven by several factors, including proximity to nearby populous areas, opportunities for recreation and shopping, and inventory of lodging options compared to surrounding areas. Baseline estimates for day visitation is calculated as a factor of overnight visitation, the factor derived from regional results of national visitor profile data.

Spending on travel-related activities translates into jobs, earnings, and taxes. Calculation of these direct impacts relies on public data on jobs, wages, and business receipts by industry for each geographical area. State and local taxes on travel-related business also factor in triangulating direct travel impacts. DRA estimates overnight visitor volume by cross-referencing visitor surveys and lodging data. Because of this, the volume estimates reported here may not align with estimates that rely solely on visitor surveys. Visitor Spending is a more reliable metric than Visitor Volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys.

Findings in this report have been compared to various public and private data sources to ensure that the economic impacts estimates are as accurate as possible. Key private data sources used for the purposes of this analysis include AirDNA, Smith Travel Research, and OmniTrak. Public data sources include the U.S. Census Bureau, U.S. Bureau of Economic Analysis (BEA), U.S. Bureau of Labor Statistics (BLS), U.S. Energy Information Administration (EIA), U.S. Bureau of Transportation Statistics (BTS), Washington Department of Revenue, and the Seattle Southside RTA.





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