

**TRI VALLEY, CALIFORNIA  
TRAVEL IMPACTS, 2012-2016P**

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*Prepared for*

Visit Tri-Valley  
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## Introduction

Travel and tourism are an important component of the economy in the Tri Valley Region of Alameda and Contra Costa Counties in California. This region is defined as the communities of Dublin, Livermore and Pleasanton in Alameda County and Danville in Contra Costa County. The attractive landscape, pleasant weather, established visitor services and attractive features such as gourmet wine and food bring both overnight and day visitors to the area. This research describes the economic benefits of these visitors, with primary findings covering the period 2012 through 2016.

Findings include travel-generated sales, employment and payroll that these sales support, and the associated state and local tax receipts. In addition there are estimates of overnight visitor volume and the associated average spending.

## Methodology Overview

The figures for Tri Valley are prepared from research for Alameda and Contra Costa Counties that is prepared for Visit California, augmented with the most recent data available for the Tri Valley Region. Figures representing 2016 are preliminary in that certain data involved in the analysis are not available in final form until after this report is prepared; for analysis purposes these are estimated on the basis of previous year data and trends. Overall findings typically vary little when final data are available.

## Region Definition and Population

The Tri Valley Region consists largely of four communities, Livermore, Pleasanton and Dublin in Alameda County and Danville in Contra Costa County. The Tri Valley area represents about 13% of Alameda County and somewhat under 7% of Contra Costa County. The dominant portions of these counties abut San Francisco Bay and are very oriented to the economic activity of the East and South Bay region.

Population, Alameda and Contra Costa Counties and Tri Valley Portions

Location	Population 2015			
	Alameda County		Contra Costa County	
	Number	Percent	Number	Percent
Tri Valley	217,145	13.3%	75,591	6.7%
Remainder	1,421,070	86.7%	1,047,640	93.3%
Total County	1,638,215	100.0%	1,123,231	100.0%
Source: US Census				

## Commercial Lodging

Commercial lodging is somewhat more concentrated in the Tri Valley area than is population, as appears in the table below. About 16% of commercial lodging units of the two counties are located in the Tri Valley Region.

Commercial Lodging Inventory, Alameda and Contra Costa Counties, Tri Valley Region

Location	Commercial Lodging Units					
	Alameda County		Contra Costa County		Total	
	Number	Percent	Number	Percent	Number	Percent
Tri Valley	3,683	21.2%	62	1.0%	3,745	15.7%
Remainder	13,677	78.8%	6,435	99.0%	20,112	84.3%
Total County	17,360	100.0%	6,497	100.0%	23,857	100.0%
Source: STR, Dean Runyan Associates						

## Lodging Sales

Lodging sales in the Region have grown substantially since 2012 but are concentrated in the Tri Valley Region in a manner very similar to lodging units, with the Region representing somewhat under 16% of all sales in the two-county area.

Lodging Sales, Alameda and Contra Costa Counties, Tri Valley Region

Location	Annual Sales (\$M)				
	2012	2013	2014	2015	2016
Alameda County	367.9	423.4	483.6	567.0	647.6
Tri Valley Portion	76.5	86.8	95.3	112.3	129.1
Percent	20.8%	20.5%	19.7%	19.8%	19.9%
Contra Costa County	118.3	132.2	152.6	169.9	188.0
Tri Valley Portion	1.5	1.7	1.9	1.9	2.3
Percent	1.3%	1.3%	1.2%	1.1%	1.2%
Total Region	486.2	555.6	636.1	736.9	835.6
Tri Valley portion	78.0	88.5	97.2	114.1	131.4
Percent	16.0%	15.9%	15.3%	15.5%	15.7%
Source: STR, Dean Runyan Associates					

## Camping

Campground capacity in Alameda County is concentrated in the Tri Valley Region, while most Contra Costa County camping is outside the area.

Campground Units, Alameda and Contra Costa Counties, Tri Valley Region

Location	Campground Units			
	Alameda County		Contra Costa County	
	Number	Percent	Number	Percent
Tri Valley	268	70.0%	60	18.8%
Remainder	115	30.0%	260	81.3%
Total County	383	100.0%	320	100.0%
Source : Woodalls, Dean Runyan Associates				

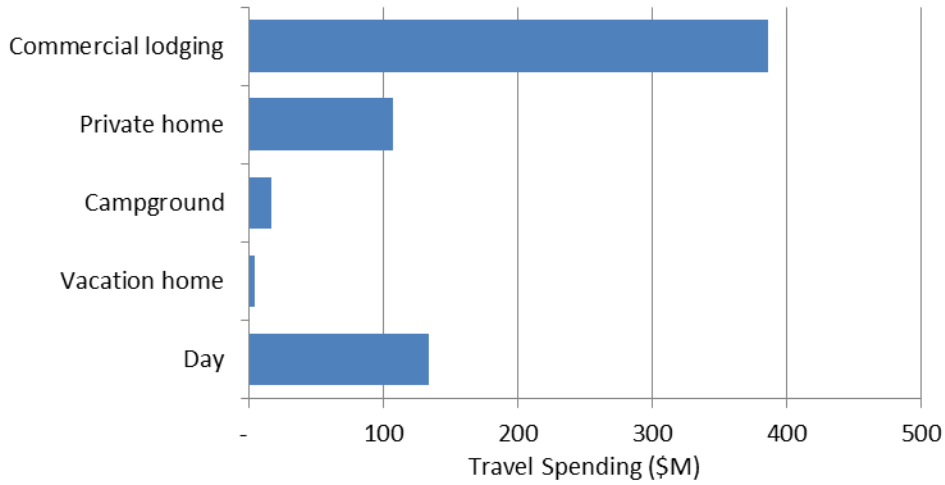
## Travel Spending

Tri Valley travel spending has increased steadily since 2012, rising from \$557 million to \$646 million, an annual average increase of approximately 3.8%. Most of this growth is attributable to visitors staying in commercial lodging.

Tri Valley Travel Spending, 2012 – 2016p

Category	Travel Spending (\$M)				
	2012	2013	2014	2015	2016p
Commercial lodging	312	328	335	364	386
Private home	100	101	103	105	106
Campground	5	11	17	16	17
Vacation home	4	4	4	4	4
Day	136	135	131	132	133
Total	557	579	589	621	646
Source: Dean Runyan Associates					

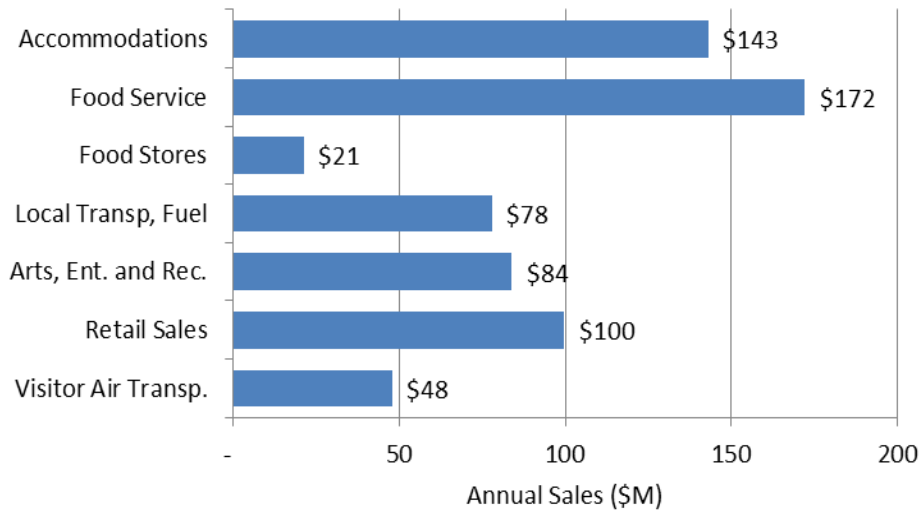
### Travel Spending by Type of Visitor Accommodation, 2016p



### Commodities Purchased

Travelers to the Tri Valley Region spent the most on food service and accommodations, with substantial spending on retail as well. Purchases of visitor air transportation relate to the location of the Oakland International Airport in Alameda County.

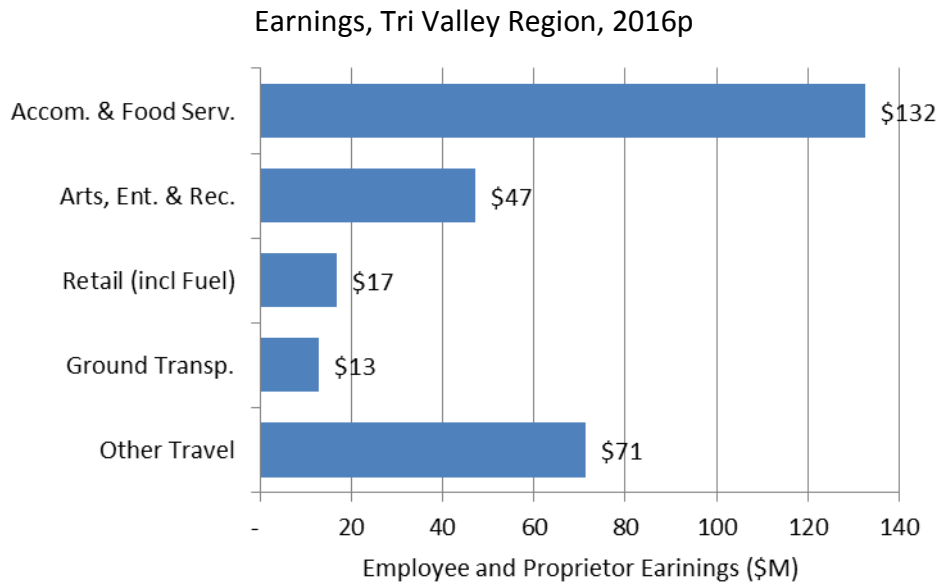
### Visitor Spending by Commodity Category, 2016p



### Employment and Earnings

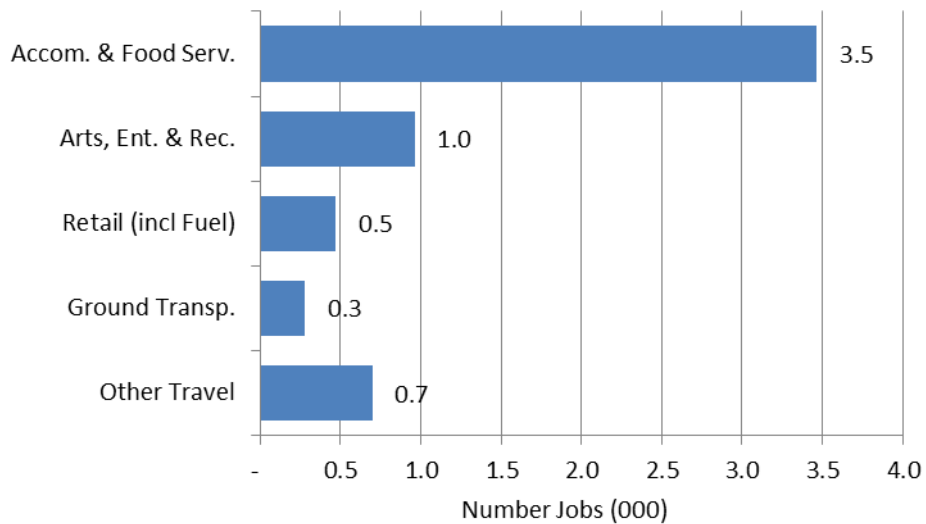
Total 2016 earnings in the Tri Valley Region that are attributable to visitor spending totaled \$281 million, with the largest portion (\$132 million) in accommodations and food service

businesses. The “Other Travel” category includes earnings for such things as air transportation, travel arrangement and visitor industry services for meetings and visitor bureaus.



Visitor spending supports a total of 5,900 jobs in the travel industry and related businesses.

**Jobs in the Tri Valley Region, by Business Category, 2016p**



**Tax Receipts**

Local 2016p tax receipts, consisting of lodging tax, plus sales, TID and property taxes, amounted to \$32.8 million. State taxes were \$34.2 million, totaling \$67 million.

## Visitor Volume and Average Expenditures

Visitor volume for the Tri Valley Region rose from 1.55 million visitors (person trips) in 2014 to 1.6 million in 2016. A substantial portion of visitors stayed with friends or relatives.

Tri Valley Visitor Volume, 2014 – 2016p

Lodging Category	Person Trips (000)			Party Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Commercial lodging	559	571	578	254	260	265
Private home	839	848	853	400	404	408
Other	160	162	164	64	65	65
Total	1,558	1,581	1,595	717	729	738
Source: Dean Runyan Associates						
Note: "Other" consists of camping and vacation home categories.						

## Average expenditures

Overall expenditures for overnight visitors averaged \$95 per person per day, and \$198 per party per day. Those staying in commercial lodging spent substantially more, \$238 per person per day and \$498 per party per day.

Average Daily Spending, 2016p

Lodging Category	Daily Spending per	
	Person	Party
Commercial lodging	\$238	\$498
Private home	\$37	\$76
Camping	\$65	\$196
Vacation Home	\$85	\$183
All Overnight	\$95	\$198
Source: Dean Runyan Associates		

## Notes Regarding Methodology

The estimates in this report are expressed in current dollars. There is no adjustment for inflation.

The economic impact measurements represent only direct economic impacts. Direct economic impacts include only the spending by travelers and the employment generated by that

spending. Secondary effects related to the additional spending of businesses and employees are not included.

The employment estimates in this report are estimates of the total number of full and part-time jobs directly generated by travel spending, rather than the number of individuals employed. Payroll and self-employment are included in these estimates.