

TEMECULA VALLEY VISITOR IMPACTS 2010 - 2018P

	2010	2011	2012	2013	2014	2015	2016	2017	2018P
Visitor Spending by Type of Traveler Accommodation (\$Million)									
Hotel, Motel	356	384	396	401	412	429	428	462	565
STVR*	-	-	-	-	-	4	18	80	141
Other Overnight**	64	70	70	68	69	68	66	71	77
Day	174	186	189	189	193	200	209	231	281
Total Visitor Spending	594	640	655	659	674	702	721	844	1,064
Visitor Spending by Type of Commodity Purchased (\$Million)									
Accommodations	57	61	64	66	70	75	79	95	117
Food & Beverage Services	103	107	111	112	117	126	134	157	198
Off Premise Food & Beverage***	74	81	80	81	85	90	92	103	127
Arts, Entertainment & Recreation	222	234	241	244	250	264	275	323	409
Retail	69	71	73	73	74	78	80	89	107
Local Transportation**	69	86	87	83	77	70	62	77	106
Total Visitor Spending	594	640	655	659	674	702	721	844	1,064
Industry Earnings Generated by Visitor Spending (\$Million)									
Leisure & Hospitality	139	146	155	161	168	179	195	233	249
All Other****	31	33	34	34	35	36	37	42	42
Total Earnings	170	178	188	195	203	216	232	275	291
Industry Employment Generated by Visitor Spending									
Leisure & Hospitality	5,170	5,280	5,550	5,750	5,870	6,080	6,290	7,260	7,530
All Other****	1,110	1,120	1,150	1,160	1,200	1,180	1,150	1,300	1,290
Total Employment	6,280	6,400	6,710	6,910	7,070	7,260	7,440	8,560	8,830
Tax Revenue Generated by Visitor Spending (\$Million)									
Local Tax Receipts	5.7	6.1	6.4	6.6	7.1	7.7	8.1	10.4	10.9
State Tax Receipts	21.3	22.1	21.4	22.2	22.3	22.4	22.3	25.2	33.9
Total Local & State Tax Revenue	27.0	28.2	27.8	28.8	29.3	30.1	30.3	35.6	44.9

STVR* Short-term Vacation Rentals
 Other Overnight** accommodations includes campsites, vacation homes, and unpaid overnight stays in the private homes of friends or relatives.
 Spending on Off Premise Food & Beverage** includes wine sales
 The Leisure and Hospitality industry includes accommodations, food services, and all arts, entertainment and recreation establishments.
 All Other**** industries includes retail, transportation, tour and winery establishments.

TEMECULA VALLEY VISITOR TRENDS 2010 - 2018P
 (MONETARY VALUES IN MILLIONS)

	Spending	Earnings	Employment	Tax Receipts		
				Local	State	Total
2010	\$594	\$170	6,280	\$5.7	\$21.3	\$27.0
2011	\$640	\$178	6,400	\$6.1	\$22.1	\$28.2
2012	\$655	\$188	6,710	\$6.4	\$21.4	\$27.8
2013	\$659	\$195	6,910	\$6.6	\$22.2	\$28.8
2014	\$674	\$203	7,070	\$7.1	\$22.3	\$29.3
2015	\$702	\$216	7,260	\$7.7	\$22.4	\$30.1
2016	\$721	\$232	7,440	\$8.1	\$22.3	\$30.3
2017	\$844	\$275	8,560	\$10.4	\$25.2	\$35.6
2018P	\$1,064	\$291	8,830	\$10.9	\$33.9	\$44.9
Average Annual Percentage Change*						
17-18P	26.1	5.8	3.2	5.5	34.4	26.0
10-18P	7.6	6.9	4.4	8.6	6.0	6.6

*Annual Change for 2010 - 2018P is the average annual percentage change



2018 TRAVEL IMPACTS

The Travel & Tourism Industry is a strong economic engine in the Temecula Valley and an important creator of jobs and economic opportunity.



TEMECULA VALLEY TRAVEL SPENDING



15 YEARS OF GROWTH

\$641 MILLION | **139.7%** PERCENT



17-18 ANNUAL PERCENT CHANGE



MONETARY VALUES IN MILLIONS

EARNINGS

2004 - \$132 | 2018 - \$291



EMPLOYMENT

2004 - 5,280 | 2018 - 8,830



LOCAL TAX

2004 - \$3.8 | 2018 - \$10.9



RETAIL

2004 - \$56 | 2018 - \$107



STATE TAX

2004 - \$14.2 | 2018 - \$33.9



FOOD & BEV on site

2004 - \$68 | 2018 - \$198



TOTAL TAX

2004 - \$18.0 | 2018 - \$44.9



FOOD & BEV off site

2004 - \$48 | 2018 - \$127



3,060,110 visitors (+14.4%)

TRAVEL MEANS
JOBS, BUSINESS & NEW EXPERIENCES

NUMBERS REFLECTED IN GRAPHICS ABOVE ARE REFERRED TO IN TEMECULA VALLEY VISITOR TRENDS 2000 - 2018P



TEMECULA VALLEY TRAVEL & TOURISM INDUSTRY

is expected to continue growing – bringing more benefits to the city, county and state economy

TEMECULA VALLEY VISITOR VOLUME, 2018P

	Person - Days			Party - Days		
	2016	2017	2018P	2016	2017	2018P
Hotel, Motel, STVR	1,482,290	1,694,830	2,113,300	667,030	847,420	1,056,650
Other Overnight	1,747,230	1,616,940	1,621,900	449,290	461,980	463,400
All Overnight	3,229,520	3,311,770	3,735,200	1,116,320	1,309,400	1,520,050
Day	1,331,563	1,365,476	1,540,060	665,782	682,738	770,030
Day & Overnight	4,561,083	4,677,246	5,275,260	1,782,102	1,992,138	2,290,080
Annual Percentage Change		2.5%	12.8%		11.8%	15.0%

	Person - Trips			Party - Trips		
	2016	2017	2018P	2016	2017	2018P
Hotel, Motel, STVR	741,145	847,415	1,056,650	333,520	423,710	528,320
Other Overnight	499,209	461,983	463,400	128,370	132,000	132,400
All Overnight	1,240,354	1,309,398	1,520,050	461,880	541,380	660,720
Day	1,331,563	1,365,476	1,540,060	665,782	682,738	770,030
Day & Overnight	2,571,917	2,674,874	3,060,110	1,127,662	1,224,118	1,430,750
Annual Percentage Change		4.0%	14.4%		8.6%	16.9%

TEMECULA VALLEY AVERAGE SPENDING, 2018P

Accommodation	Spending (Millions)	Travel Party		Person		Party Size	Length of Stay (nights)
		per day	per trip	per day	per trip		
Overnight	\$783	\$463	\$1,066	\$189	\$469	2.5	2.3
Hotel/Motel/STVR	\$705	\$601	\$1,201	\$300	\$601	2.0	2.0
Other Overnight	\$77	\$161	\$564	\$46	\$174	3.5	3.5
Day	\$281	\$420	\$420	\$210	\$210	2.0	1.0
Day & Overnight	\$1,064	\$451	\$788	\$194	\$338	2.4	1.7

Notes: Party size refers to the average number of persons in the travel party. Length of Stay refers to the average number of nights visitors stayed within Temecula Valley. Spending refers to visitor spending made at businesses located in Temecula Valley. STVR refers to short-term vacation rental.