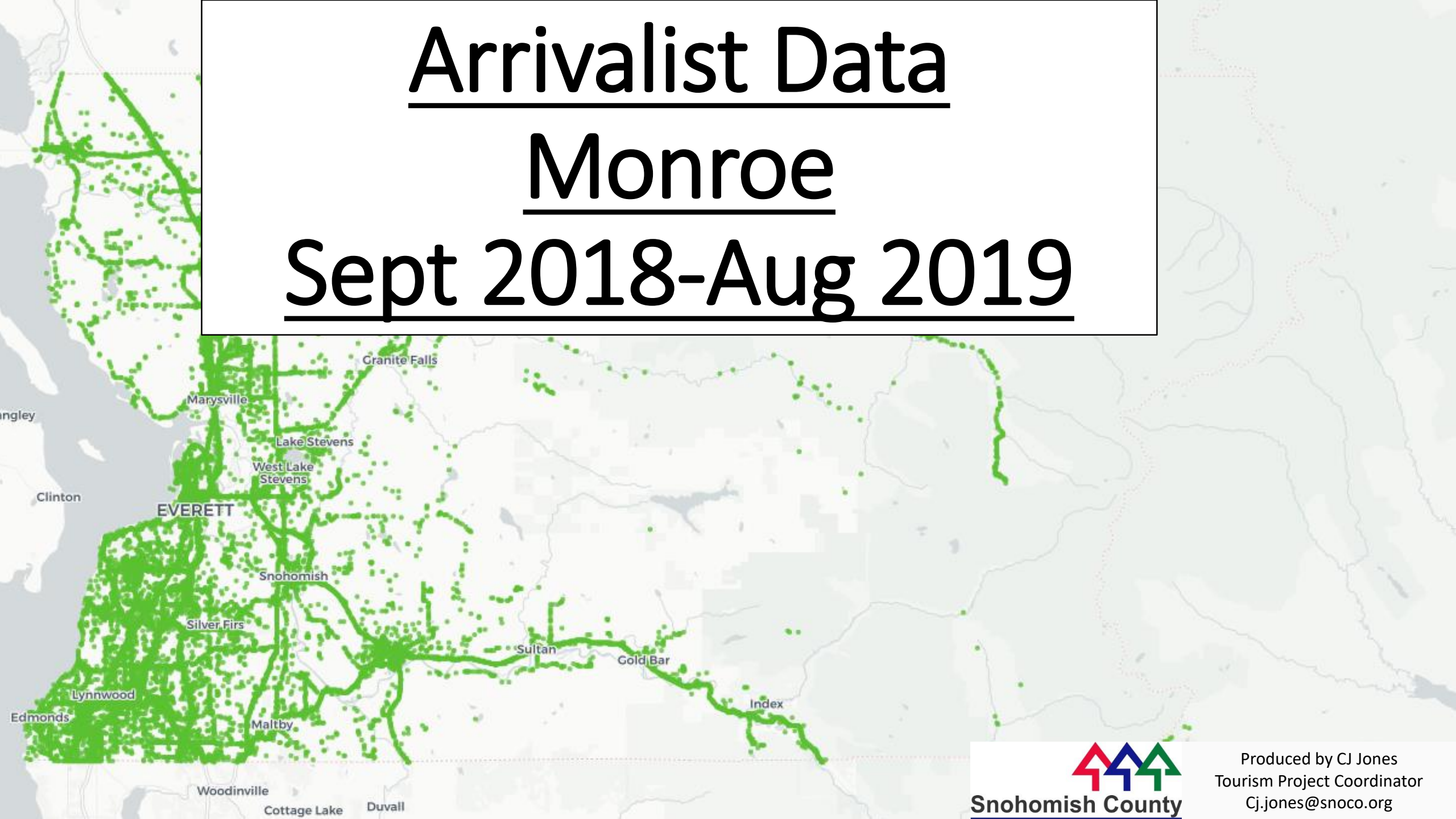
Arrivalist Data
Monroe
Sept 2018-Aug 2019



Snohomish County

Produced by CJ Jones
Tourism Project Coordinator
Cj.jones@snoco.org

Data Gathered on Behalf of Destination

- Data collected from mobile aps
- Accuracy
  - Accurate within 30 ft
- Measures
  - Origin Market Insights – where people come from
  - In-County Travel: where they go
  - Most popular Points of Interest (POI)
  - Duration of stay
  - Cross Visitation – where do they go next?
  - POI visits over time

What is a Point of Interest (POI)?

- Areas geofenced in the county
  - 19 cities and towns, four experiential visitor regions, 65+ attractions
- Helps Arrivalist determine:
  - Time spent in the POI
  - Cross visitation between like POIs (city to city, etc)
  - Visitation trends
  - Where people are from

Sample Criteria

- Any traveler must meet these criteria to be added to the sample:
  - Live in the United States
    - No foreign data at this time
  - Traveled more than ten miles from their home
    - Must be from outside the county – no locals
  - Arrived within the county
  - Spent at least two hours within the county
  - Does not repeat this pattern more than once every two weeks
    - This weeds out commuters; wanting to capture unique trips
  - The traveler returns home
    - Prevent the addition of people moving to the county

Sample Size – The First Year

- Collected between September 1, 2018 and August 31, 2019
  - Collection started September 1, 2018
  - Data is continuing to be collected and updated every month
- 164,683 visitors to Snohomish County
- 9,542 visitors to Monroe

What are Washington's Designated Market Areas (DMA)?

DMAs (Designated Market Areas) are the geographic areas in the United States in which local television viewing is measured by Nielsen. It is also used for other media marketing purposes.

General Overview - Visitor Regions

Snohomish County

Date Range : 9.01.18 – 8.31.19

Arrivalist®

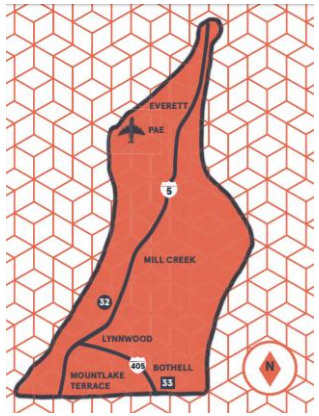
URBAN
BASECAMP

SALISH SEA
COASTAL
COMMUNITIES

SKYKOMISH
RIVER VALLEYS
SNOHOMISH

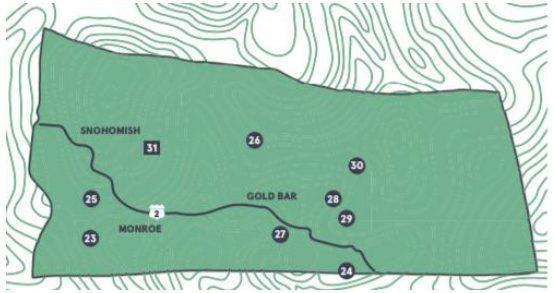
STILLAGUAMISH
SAUK
RIVER VALLEYS

Regions | Definitions

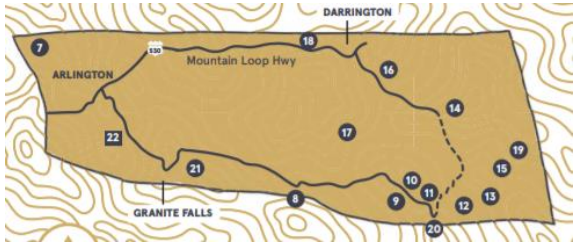


Urban Basecamp

Coastal Communities
Of The Salish Sea



Skykomish - Snohomish River Valleys



Stillaguamish - Sauk River Valleys

45.4% of all Arrivals

14 Hrs. on Avg. in Snohomish County

25.4% of all Arrivals

14 Hrs. on Avg

21.3% of all Arrivals

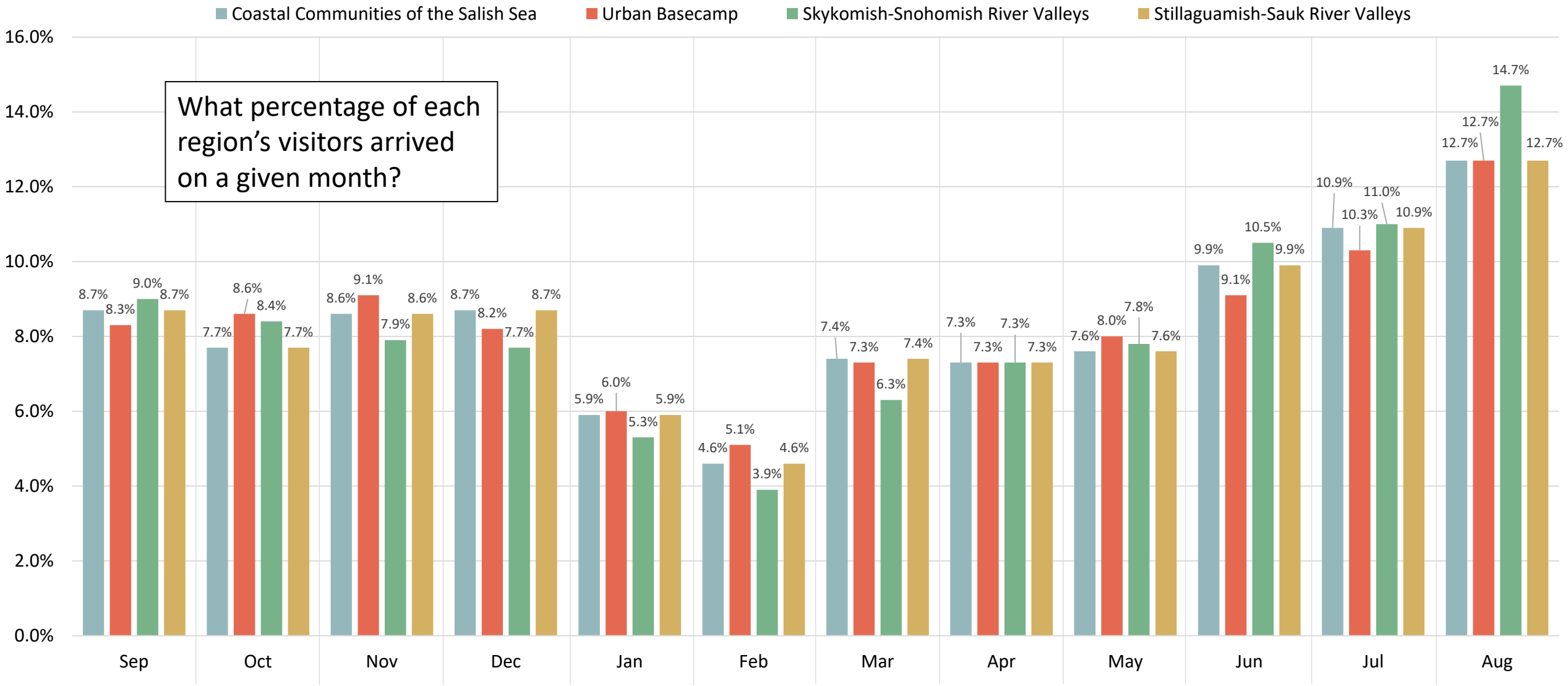
15 Hrs. on Avg.

7.9% of all Arrivals

15 Hrs. on Avg.

Date Range : 9.01.18 – 8.31.19 Greater Regions Reports, Universe Panel, Visited Locations ALL

Visits to Each Region by Month



Date Range : 9.01.18 – 8.31.19

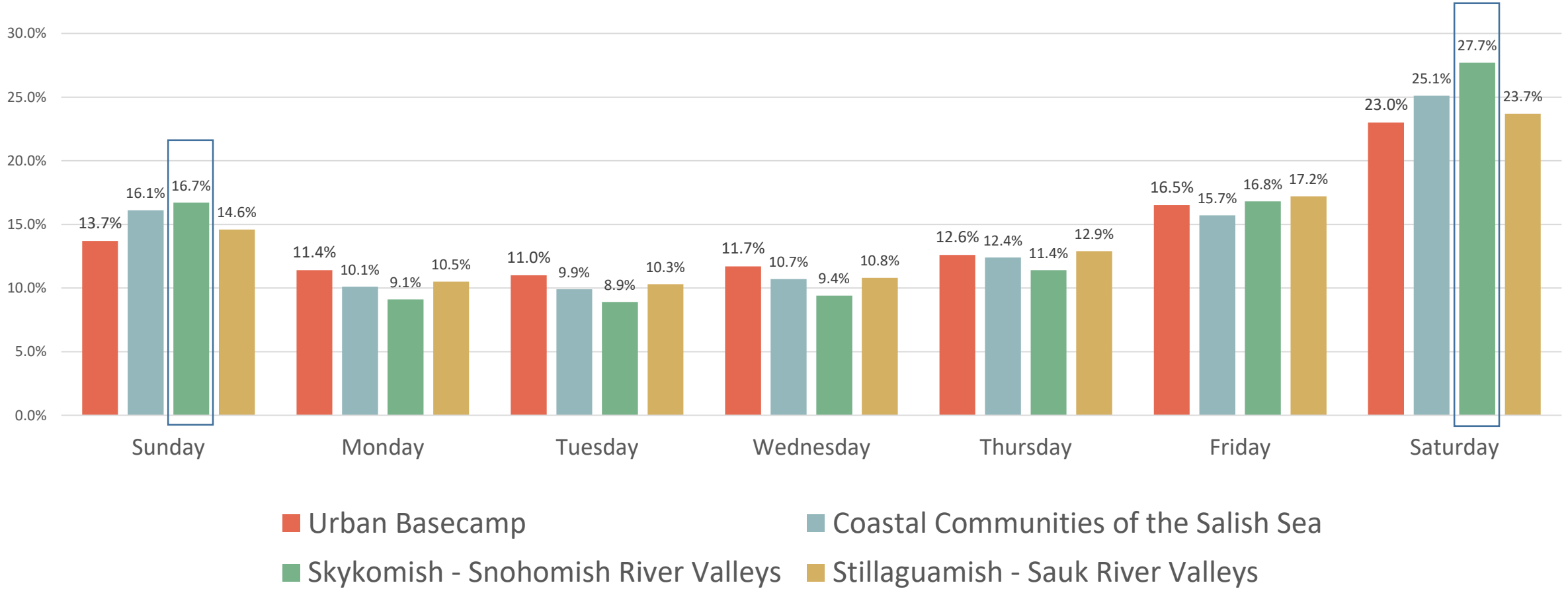
Visits by Regions by Day of the Week

Urban Basecamp Gets Highest % of Mid-Week Arrivals

What percentage of each region's total visitors arrived on what day?

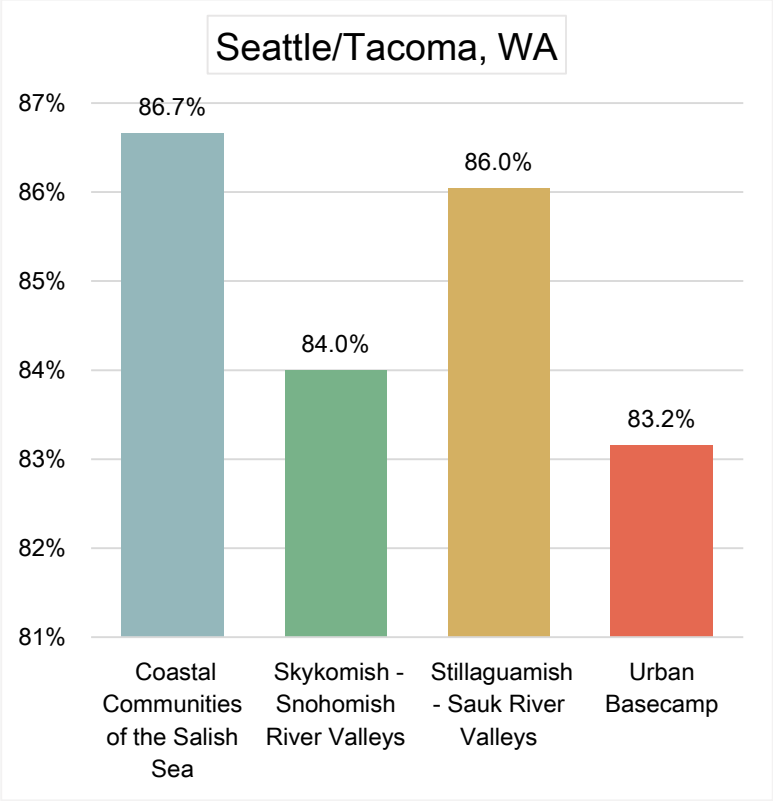
Mid-Week (Monday through Thursday):

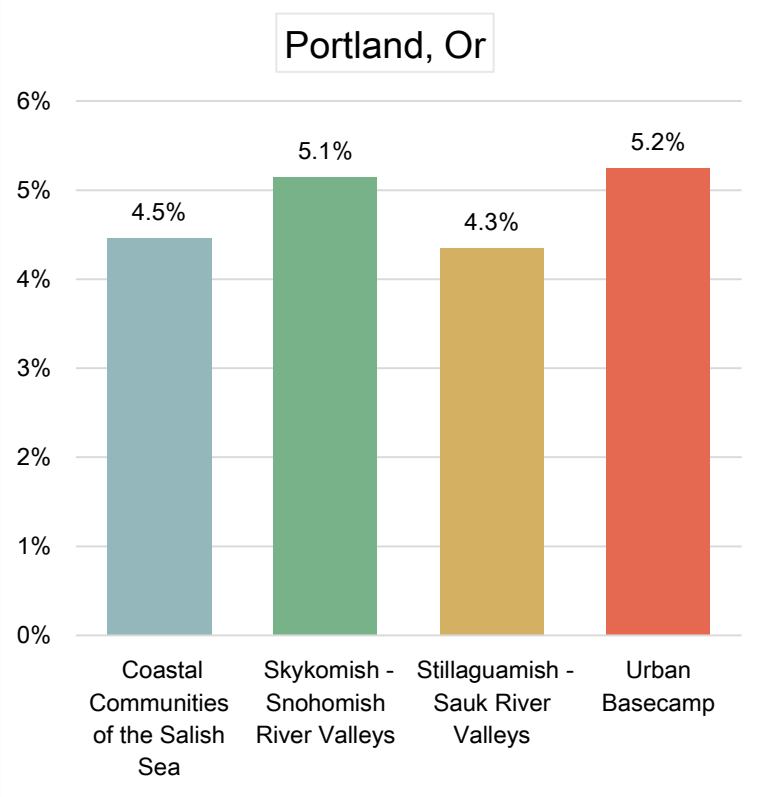
Urban Basecamp	46.7%
Coastal Communities	43.1%
Skykomish – Snohomish River Valleys	38.8%
Stillaguamish – Sauk River Valleys	44.5%

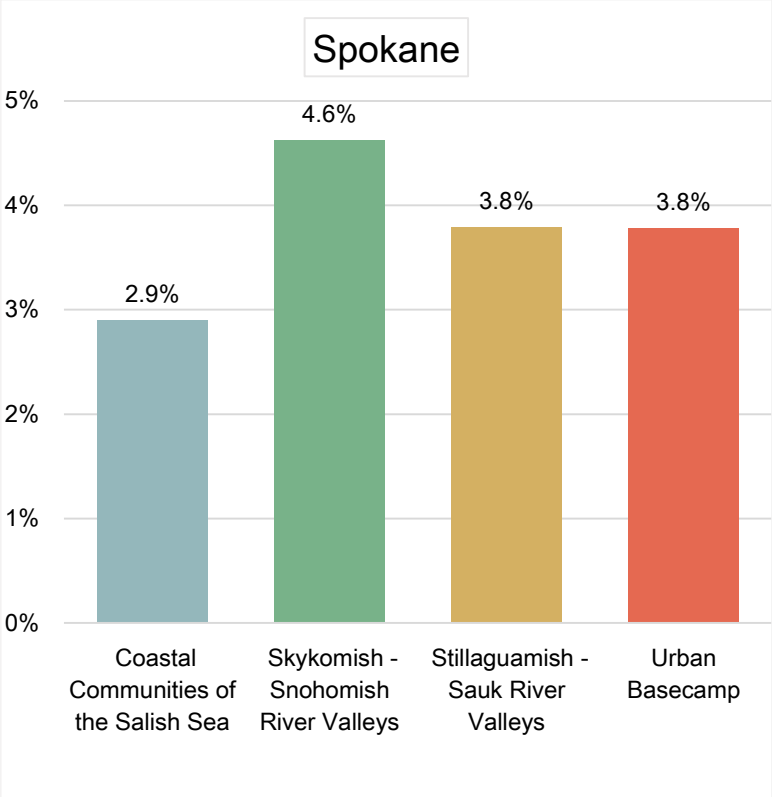


Date Range : 9.01.18 – 8.31.19 Greater Regions Reports, Universe Panel, Visited Locations ALL

Visitor Share from Top 3 DMAs & Avg Time Spent in Snohomish County





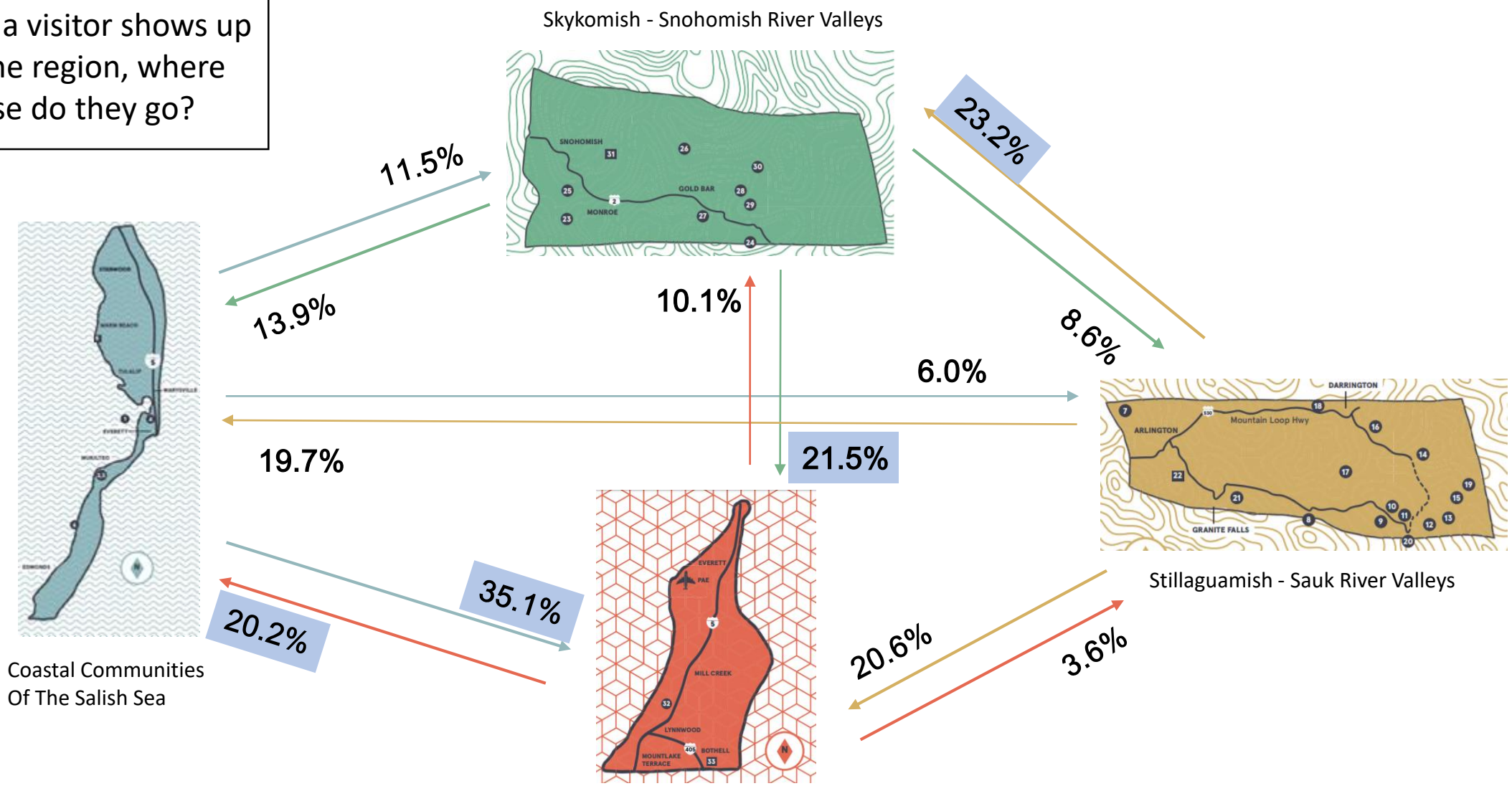


Avg. Time Spent in Snohomish County	Coastal Communities of the Salish Sea	Skykomish - Snohomish River Valleys	Stillaguamish - Sauk River Valleys	Urban Basecamp
Seattle/Tacoma	11 Hours, 36 Minutes	13 Hours, 22 Minutes	13 Hours, 47 Minutes	11 Hours, 4 Minutes
Portland-Or	1 Days, 18 Hours, 59 Minutes	1 Days, 13 Hours, 58 Minutes	1 Days, 16 Hours, 44 Minutes	1 Days, 11 Hours, 40 Minutes
Spokane	2 Days, 1 Hours, 27 Minutes	1 Days, 22 Hours, 24 Minutes	2 Days, 4 Hours, 1 Minutes	1 Days, 10 Hours, 54 Minutes

Date Range : 9.01.18 – 8.31.19

Cross Visits Between the Regions

When a visitor shows up in one region, where else do they go?



Highest cross visit %

Date Range : 9.01.18 – 8.31.19

Snohomish Municipal Areas - Monroe Analysis

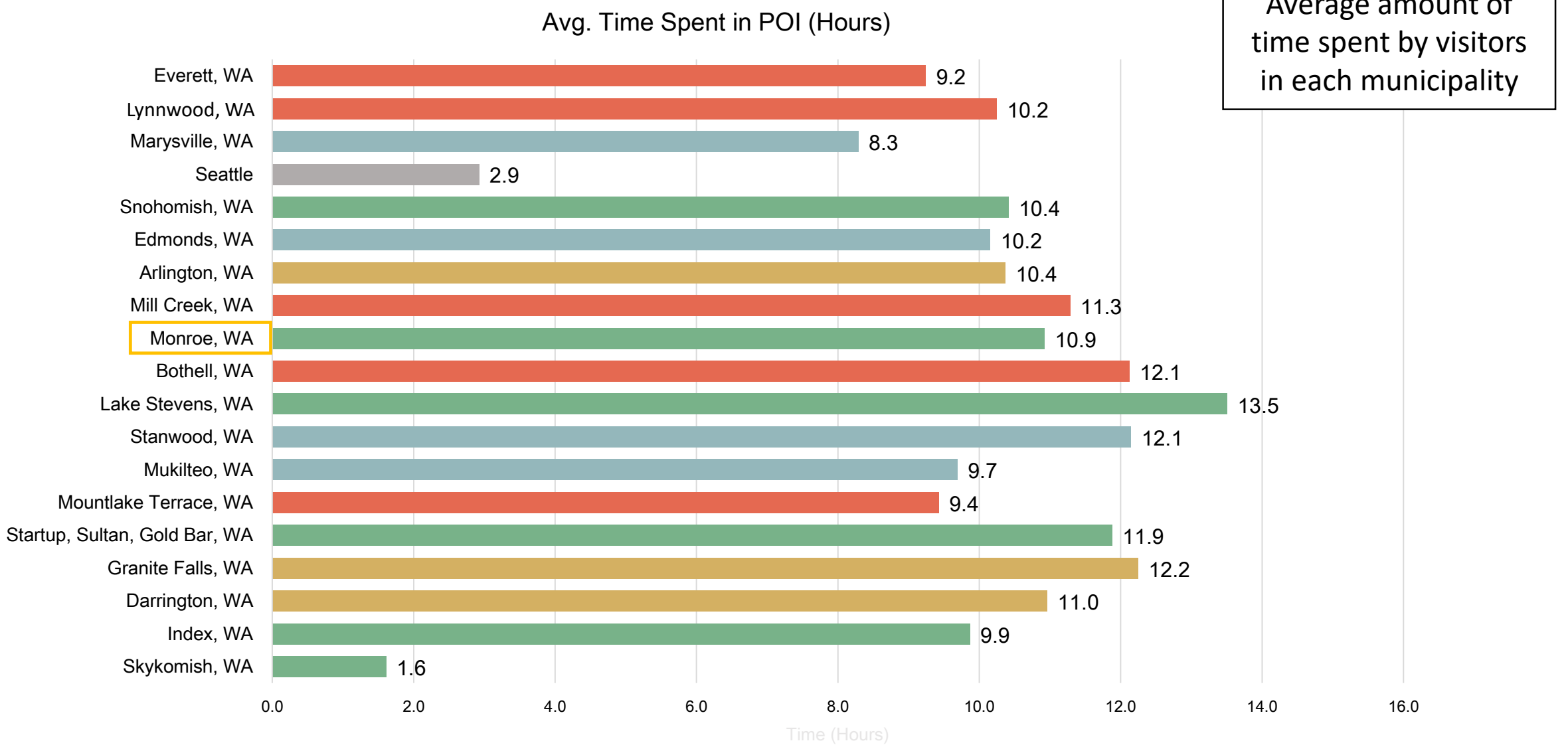
Snohomish County

Date Range : 9.01.18 – 8.31.19

Arrivalist®

Length of Stay for Monroe Compared to Other Municipalities

Average amount of time spent by visitors in each municipality



Date Range : 9.01.18 – 8.31.19

Monroe| Origin Markets & Length of Stay

Origin DMA	% Visits	Avg. LOS	Repeat Visits
Seattle/Tacoma	80.7%	7 Hours 7 Min	30.8%
Spokane	5.2%	15 Hours 27 Min	23.1%
Portland	4.8%	16 Hours 19 Min	28.0%
Yakima/Pasco	3.1%	13 Hours 12 Min	29.5%
Los Angeles	0.5%	17 Hours	2.0%
San Francisco/Oakl	0.3%	20 Hours 23 Min	10.7%
Eugene	0.3%	18 Hours	7.7%
Boise	0.2%	12 Hours 32 Min	17.4%
Sacramento/Stockt	0.2%	22 Hours 29 Min	5.0%
Dallas/Fort Worth	0.2%	17 Hours 25 Min	0.0%

Date Range : 9.01.18 – 8.31.19

Sample Size: 9,542

LOS = Length of Stay

Visitation Analysis | Snohomish County as Primary or Secondary Destination

% of Visitors who make
Snohomish County their Primary Destination
69.4%

% of Visitors who make
Snohomish County their *Secondary* Destination
30.6%
"Secondary" meaning the device spent more time on its trip in a destination other than Snohomish County

When Snohomish County is the Primary Destination

10 hours in Monroe
18 hours in Snohomish County

***SECONDARY* Destination**

4 hours in Monroe
8 hours in Snohomish County

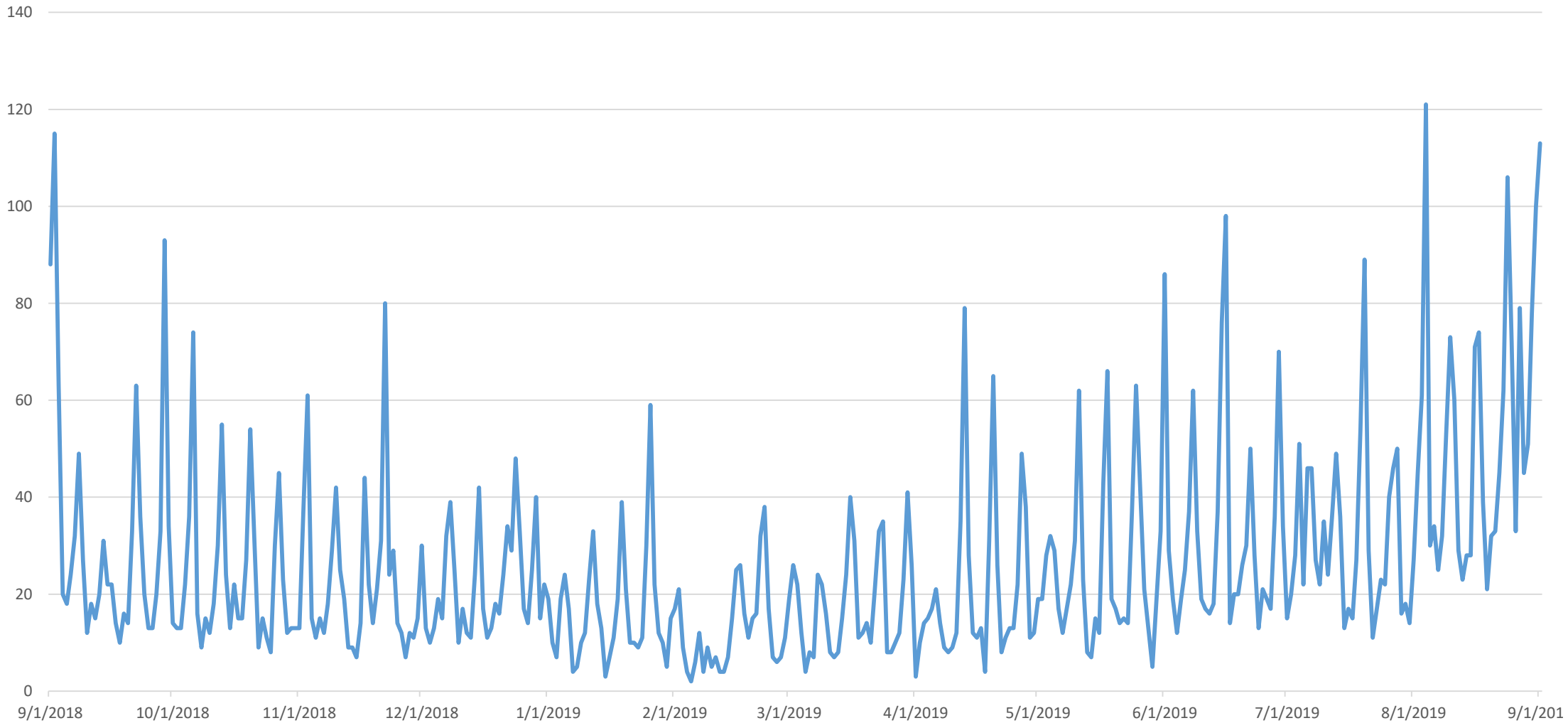
Date Range : 9.01.18 – 8.31.19

Trips Outward To Other Cities

Secondary Arrival	% of Cross Visitation
Sultan, Startup, Gold Bar	15.7%
Snohomish	13.8%
Seattle	9.0%
Everett	6.7%
Skykomish	5.9%
Marysville	4.6%
Lynnwood	3.7%
Arlington	2.6%
Lake Stevens	2.6%
Edmonds	2.2%
Mill Creek	1.7%
Bothell	1.4%
Index	1.2%
Granite Falls	0.9%
Mukilteo	0.5%
Stanwood	0.5%
Mountlake Terrace	0.5%
Darrington	0.1%

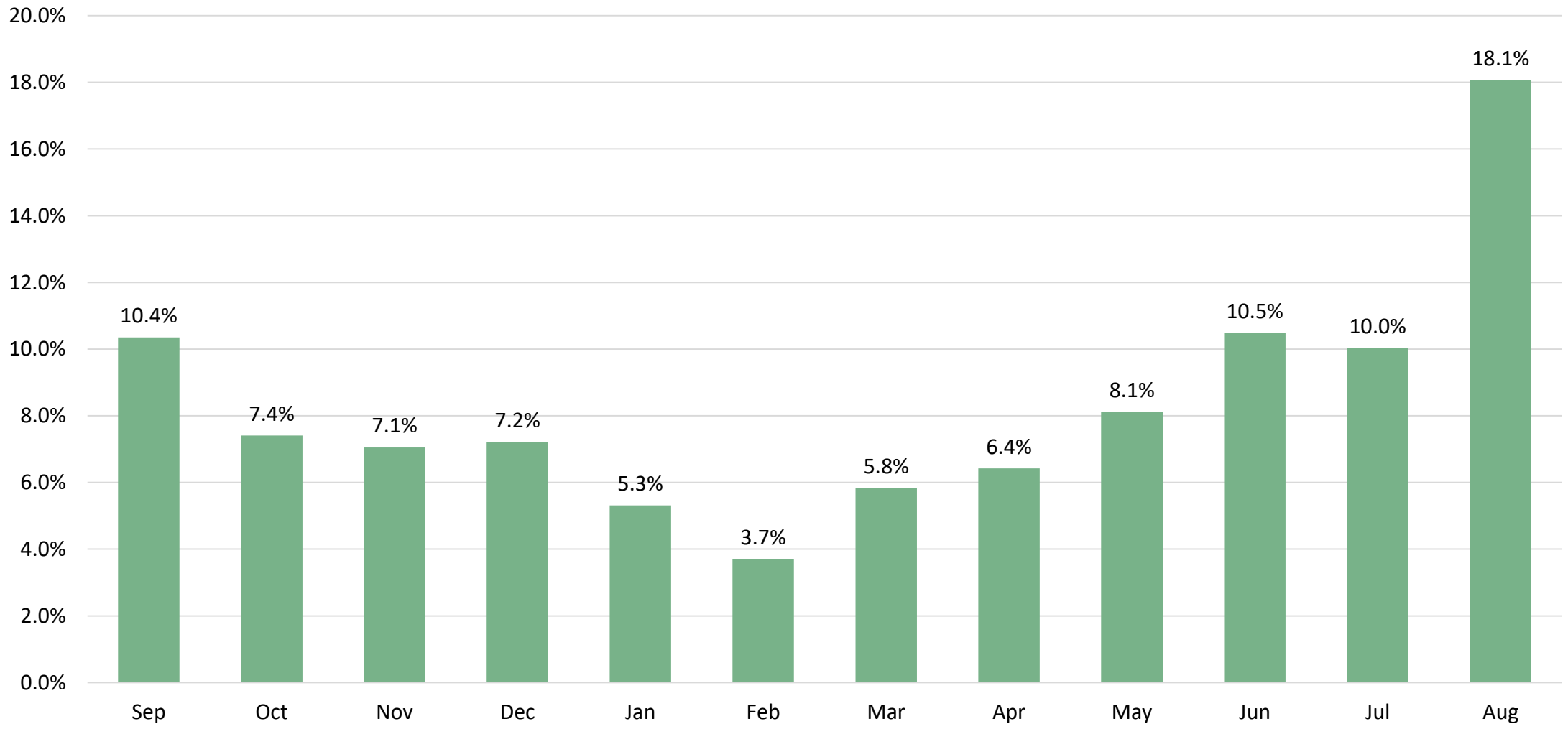
Date Range : 9.01.18 – 8.31.19

Visitors by Day for Monroe - Sept 2018–Aug 2019



Date Range : 9.01.18 – 8.31.19

Visitors by Month for Monroe – Sept 2018–Aug 2019



Date Range : 9.01.18 – 8.31.19

Overview

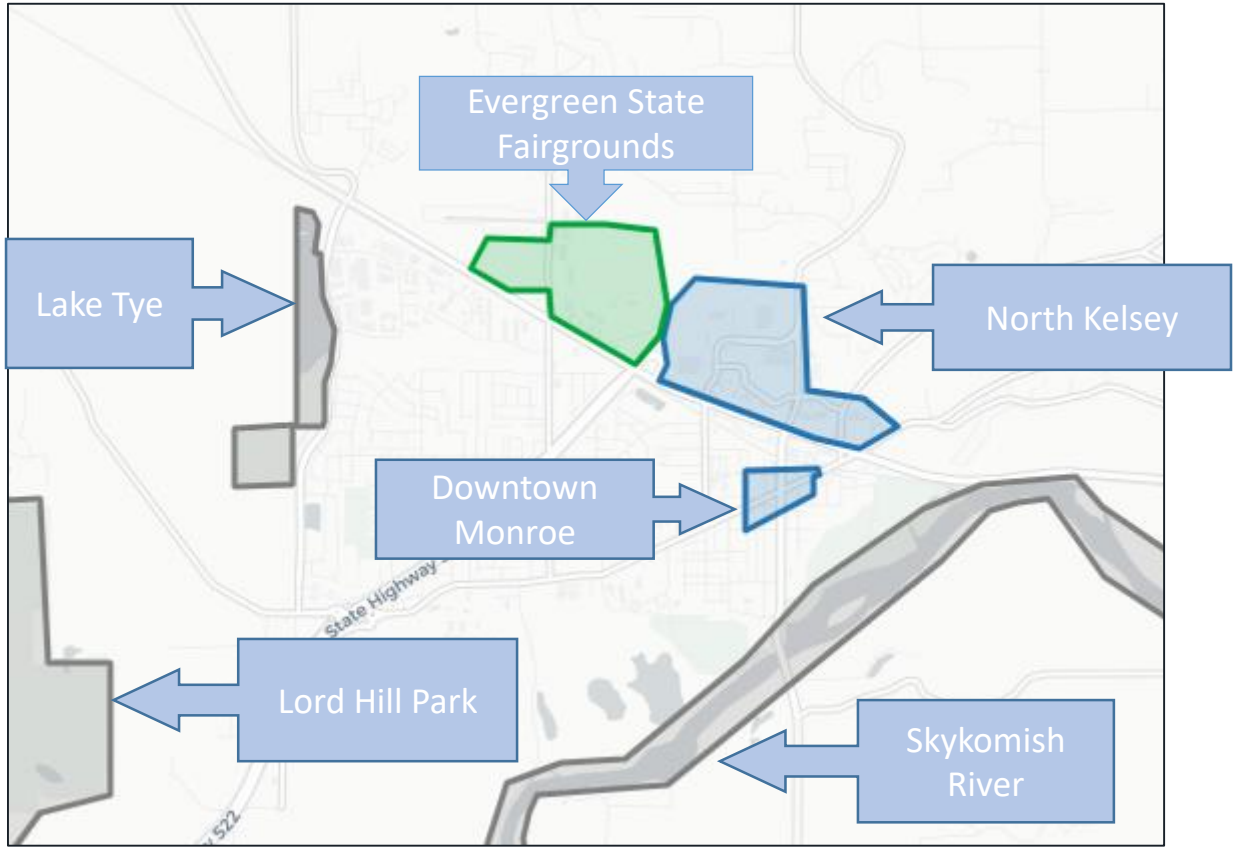
- The summer months are the biggest for Monroe, with a spike in August
  - Likely tied to the fair
  - Seasonal access to recreation important
- Monroe has a strong connection to other parts of the Snohomish-Skykomish Valley
  - Natural partners along Highway 2
- Less cross visitation with Seattle
  - More important for people visiting Snohomish County as their primary destination
- Weekend spikes reflect leisure travelers
- Stronger than average connection with Spokane over Portland
  - Typical of the Sky Valley, not of the county as a whole

Overview - Monroe Points of Interest (POI)
Snohomish County as a Destination

Date Range : 1.01.19 – 1.01.20

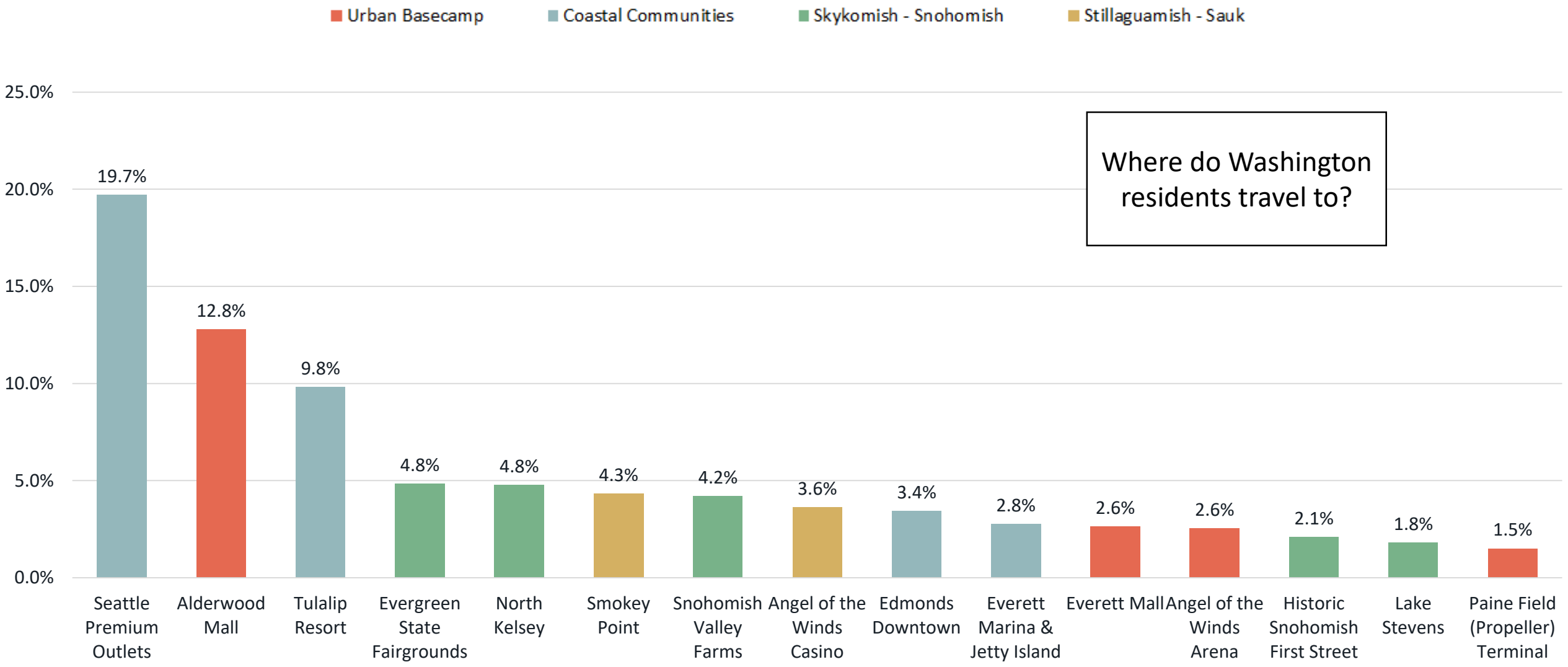
Arrivalist®

Monroe Points of Interest (POIs)



To be added: Lewis Street Boat Launch

Top Points of Interest – Washington Travelers 2019

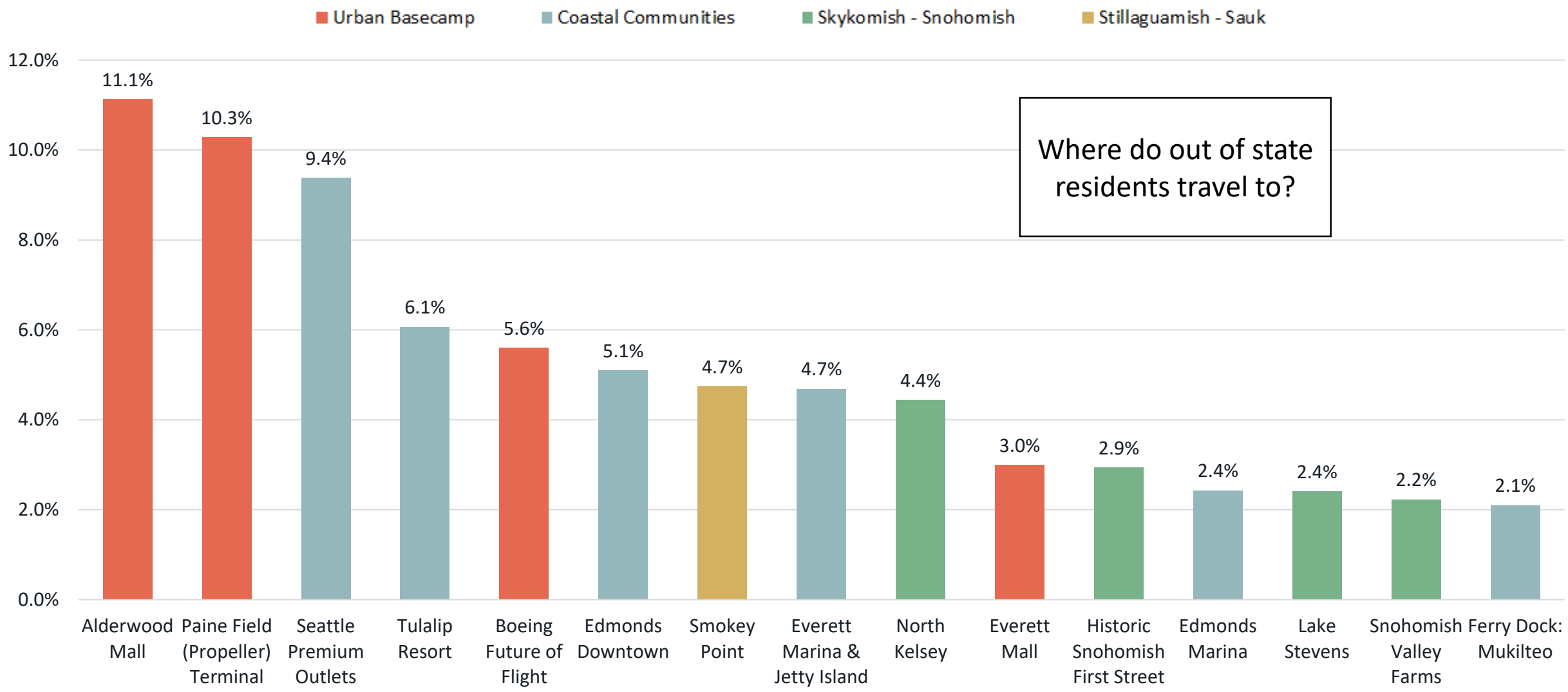


Where do Washington residents travel to?

Date Range : 1.01.19 – 12.31.19

Sample Size: 34,166

Top Points of Interest – Out of State Travelers 2019

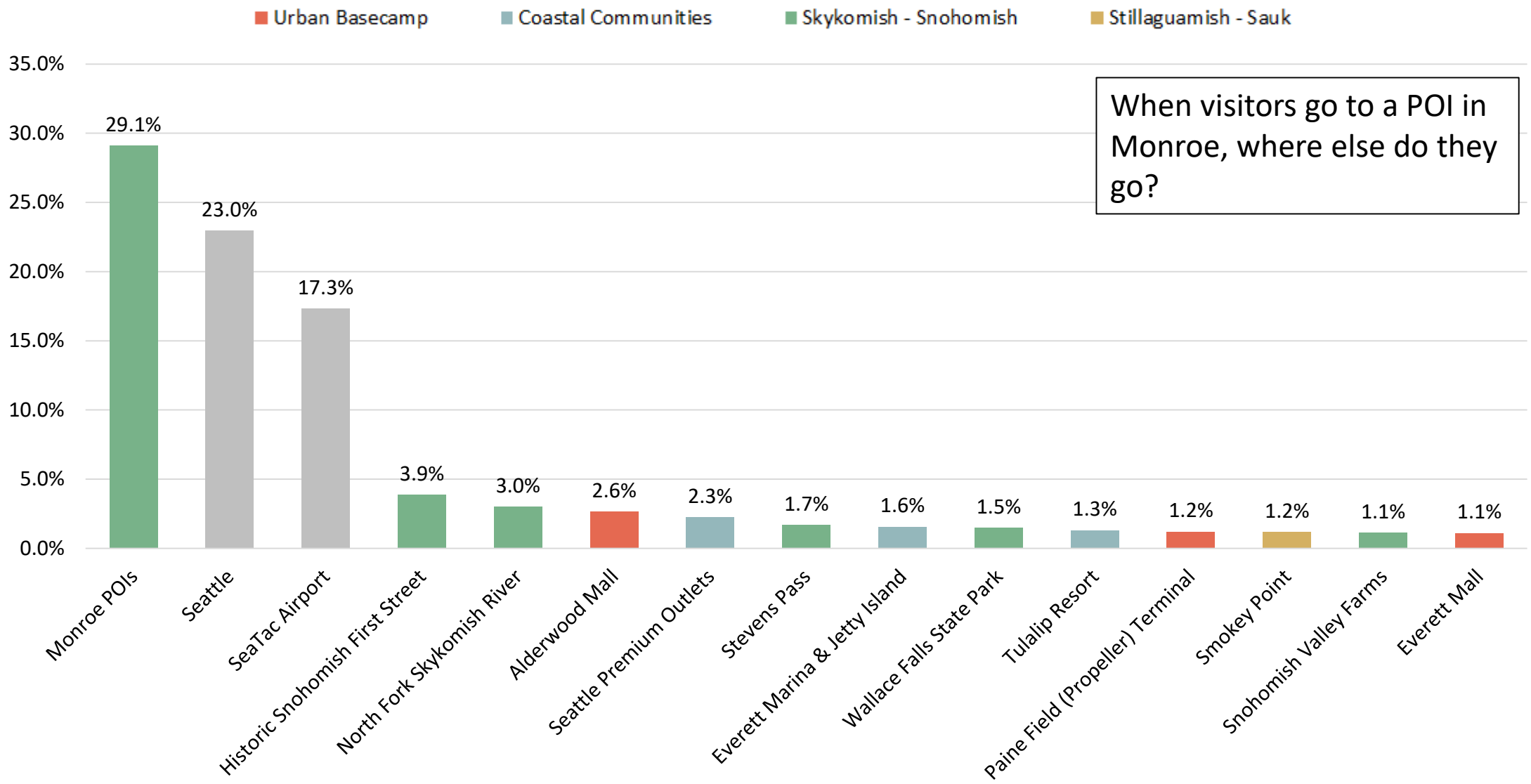


Where do out of state residents travel to?

Date Range : 1.01.19 – 12.31.19

Sample Size: 13,052

Top Monroe POI Cross Visitation in 2019



When visitors go to a POI in Monroe, where else do they go?

Date Range : 1.01.19 – 12.31.19

Monroe POI Cross Visitation 2019

	North Kelsey	Evergreen State Fairgrounds	Downtown Monroe	Lake Tye
North Kelsey		216	80	7
Evergreen State Fairgrounds	216		31	0
Downtown Monroe	80	31		1
Lake Tye	7	0	1	

When visitors go to a POI in Monroe, do they go to another POI in the city?

Date Range : 1.01.19 – 12.31.19

AirDNA for Monroe

- 78 Active rentals in Q3 of 2019
  - 76% entire homes, 24% single rooms
  - 48.7% increase in volume since Q3 of 2016
- Distinct seasons of occupancy peaking in June-July-August
  - Going back three years
  - This year saw a smaller spike compared to 2018
- Current Average Daily Rate of $119.00
  - Entire Home: $186.00, Single Room: $73.00
- Top Domestic Cities:
  - Seattle, Portland, Tacoma
- Top International Cities:
  - Vancouver, London, Langley