

OTHER PORT OF SEATTLE ACTIVITIES INCLUDING RECREATIONAL MARINAS



Port of Seattle is home to an extensive portfolio of real estate assets and tenants. Supported activities include recreational marinas, industrial and non industrial tenants, the moorage of tugs, barges and more.





In addition to The Northwest Seaport Alliance operations, commercial fishing, and cruise ships, the Port of Seattle is also home to an extensive portfolio of real estate assets and tenants. These activities range from recreational marinas, moorage of tugboat and barges for local common and contract carriers, the grain facility at Terminal 86, non-maritime industrial tenants, to the moorage of research vessels.

The Port of Seattle is home to four recreational marinas: Shilshole Marina, Harbor Island Marina, Salmon Bay Marina, and Bell Harbor Marina. Of these, Shilshole is the largest, with capacity for more than 1,400 vessels. Shilshole is also home to Washington's largest liveaboard community with capacity for 350 live-aboard vessels. Recreational marinas support various economic activities, including marina support staff, onsite restaurants, bars and related food services, fuel, and vessel maintenance and repair services.

Port facilities are also used for a wide variety of other activities. The Port of Seattle offers moorage for tugs and barges, as well as research vessels. Tenants at the Port of Seattle range from construction and architecture companies, to manufacturers and retailers, as well as a wide variety of services outside of those that directly handle marine cargo included under The Northwest Seaport Alliance.

Tug and barge operators provide inter-harbor and long-distance conveying of non-containerized cargo, such as building materials to and from marine construction sites, shipments to Alaska, and towing of industrial equipment. Tug and barge operators that utilize Port of Seattle facilities include Crowley Marine Services, Foss Maritime, General Construction, Manson Construction, and others. In total, tug, barge, and marine construction dockage and moorage leases generated nearly \$2.4 million in revenue for the Port of Seattle in 2017.

Research vessels mooring at Port of Seattle facilities in 2017 included three vessels operated by the National Oceanic and Atmospheric Administration, as well as the Sikuliaq, operated by the University of Alaska. These vessels depend upon Port of Seattle facilities for seasonal moorage between research missions as well as essential maintenance and inspection services. These four research vessels conduct a wide variety of research including ocean mapping and activities to support fisheries.

The Port also owns and leases industrial lands to non-maritime tenants. Examples include warehousing of non-containerized cargo, local manufacturers, retail, and services.

Exhibit 34. Estimated Direct Impacts of Port of Seattle Recreational Marinas and Other Port Business, Washington, 2017

Segment	Jobs	Business Output (mils \$)	Labor Income (mils \$)
Port of Seattle Tenants	2,400	\$514.9	\$217.6
Vessel Moorage and Barge and Tug Tenants	820	\$126.0	\$104.5
Recreational Marinas	200	\$29.6	\$13.9
Port of Seattle Staff	110	\$34.0	\$13.0
Bulk Cargo Operations	90	\$24.3	\$8.2
Total	3,620	\$728.8	\$357.2

Sources: Puget Sound Regional Council, 2019; Washington State Employment Security Department, 2018; Washington State Department of Revenue, 2018; Port of Seattle, 2018; Community Attributes Inc., 2019.

There were an estimated 200 jobs directly tied to recreational marinas, with an associated \$13.9 million in labor income and \$29.6 million in output. In total, recreational marinas and other Port of Seattle business directly supported more than 3,600 jobs, more than \$357 million in labor compensation, and nearly \$729 million in business output.

An additional 200 jobs were supported through indirect and induced impacts from recreational marina activities. Nearly all direct impacts from recreational marinas were attributed to Shilshole Marina. Factoring in indirect and induced impacts, recreational marinas at the Port of Seattle supported \$65.2 million in total business output, of which \$23.3 million was through induced impacts. Total labor income impacts summed to \$25.5 million (**Exhibit 35**).

Exhibit 35. Economic Impacts of Recreational Marinas at the Port of Seattle, Washington, 2017

	Direct	Indirect	Induced	Total
Jobs	200	100	100	400
Total Compensation (mils 2017 \$)	\$13.9	\$3.7	\$7.9	\$25.5
Business Output (mils 2017 \$)	\$29.6	\$12.3	\$23.3	\$65.2

Sources: Washington State Office of Financial Management, 2018; Community Attributes Inc., 2019.

Other port business includes industrial and non-industrial activities and Port tenants, ranging from bulk cargo handling and support services (such as the grain facility at T-86), research vessels moored at Port of Seattle facilities, construction and engineering firms with activities on Port of Seattle facilities, cargo and barge operations with barges moored on Port property, various non-industrial Port tenants and Port of Seattle staff supporting these activities. In 2017, an estimated 3,400 jobs, \$343.3 million in labor income, and \$699.2 million in business output were directly tied to these activities. The total economic impact of other port business, including indirect and induced impacts, summed to 8,400 jobs, \$616.5 million in labor income, and nearly \$1.6 billion in business output (**Exhibit 36**).

Exhibit 36. Economic Impacts of Other Port of Seattle Business, Washington, 2017

	Direct	Indirect	Induced	Total
Jobs	3,400	1,400	3,600	8,400
Total Compensation (mils 2017 \$)	\$343.3	\$82.4	\$190.8	\$616.5
Business Output (mils 2017 \$)	\$699.2	\$290.6	\$563.1	\$1,552.8

Sources: Washington State Office of Financial Management, 2018; Community Attributes Inc., 2019.

Overall, the direct and secondary impacts of recreational marinas, dockage and moorage, industrial and non-industrial Port of Seattle tenants, and all other Port of Seattle business generated \$15.2 million in state sales and use taxes in 2017. Additionally, these impacts generated \$7.7 million in other taxes and supported through direct and secondary impacts a total of nearly \$23 million in state taxes. (**Exhibit 37**)

Exhibit 37. Total Statewide Fiscal Impacts of Recreational Marinas and Other Port of Seattle Business, Washington, Mils 2017\$, 2017

	Direct	Secondary	Total
B&O	\$2.1	\$3.9	\$6.0
Sales & Use Taxes	\$6.0	\$9.2	\$15.2
Other	\$0.4	\$1.3	\$1.7
Total	\$8.5	\$14.3	\$22.9

Sources: Washington State Department of Revenue, 2018; Washington State Employment Security Department, 2018; Community Attributes Inc., 2019.