

Island County Travel Impact 2015-2021p

	2015	2016	2017	2018	2019	2020	2021p
Total Direct Travel Spending (\$Million)							
Destination Spending	180.6	196.7	202.4	223.2	240.7	199.3	273.7
Other Travel*	7.1	6.8	7.9	9.1	9.4	6.3	9.3
Total Direct Spending	187.7	203.6	210.4	232.2	250.1	205.6	283.0
Visitor Spending by Type of Traveler Accommodation (\$Million)							
Hotel, Motel, STR	74.3	86.2	89.7	103.0	116.3	129.9	159.3
Private Home (VFR)	34.8	35.7	36.2	38.6	39.5	20.2	38.4
Campground	11.6	11.9	12.3	12.8	13.0	11.0	12.5
Vacation Home	10.4	10.8	11.0	11.4	11.7	11.4	12.2
Day Travel	49.5	52.1	53.2	57.4	60.1	26.8	51.2
Destination Spending	180.6	196.7	202.4	223.2	240.7	199.3	273.7
Visitor Spending by Type of Commodity Purchased (\$Million)							
Accommodations	28.3	31.9	32.7	35.5	39.6	39.1	57.2
Food Service	61.1	68.6	71.5	80.7	88.8	80.3	102.2
Food Stores	23.7	24.5	24.4	25.7	26.9	17.6	26.4
Local Tran. & Gas	15.9	16.1	17.8	20.7	21.1	12.9	21.2
Arts, Ent. & Rec.	23.6	25.7	26.1	28.5	30.3	24.5	31.7
Retail Sales	28.1	29.9	29.9	32.1	33.9	24.9	35.1
Destination Spending	180.6	196.7	202.4	223.2	240.7	199.3	273.7
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	33.3	37.5	43.3	48.0	51.5	41.3	47.7
Arts, Ent. & Rec.	12.9	14.0	14.2	16.1	17.1	14.5	15.6
Retail**	9.2	9.6	10.0	10.9	11.5	10.6	11.7
Transportation	2.3	2.4	2.6	3.1	3.2	2.3	2.5
Other Travel*	0.4	0.4	0.4	0.4	0.5	0.4	0.4
Total Direct Earnings	58.0	64.0	70.6	78.5	83.8	69.2	77.8
Industry Employment Generated by Travel Spending (Thousand Jobs)							
Accom. & Food Serv.	1,250	1,360	1,450	1,490	1,510	1,200	1,260
Arts, Ent. & Rec.	920	990	930	1,020	1,040	810	810
Retail**	350	350	360	380	390	340	370
Ground Tran.	70	70	70	70	80	70	60
Other Travel*	10	10	10	10	10	10	10
Total Direct Employment	2,600	2,780	2,820	2,970	3,030	2,430	2,510
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	5.8	6.5	6.6	7.1	7.4	7.0	9.0
State Tax Receipts	12.4	13.9	14.4	15.5	16.4	14.2	18.5

*Other travel includes travel arrangement services and transportation spending to leave the destination

**Retail includes gasoline stations.

ISLAND COUNTY VISITOR VOLUME AND VISITOR SPENDING

Visitor Spending by type of Accommodation (\$Millions)

	2015	2016	2017	2018	2019	2020	2021p
Total Destination Spending	180.6	196.7	202.4	223.2	240.7	199.3	273.7
All Overnight	131.1	144.6	149.3	165.7	180.5	172.5	222.5
Hotel, Motel, STR	74.3	86.2	89.7	103.0	116.3	129.9	159.3
Private Home (VFR)	34.8	35.7	36.2	38.6	39.5	20.2	38.4
Other Overnight	22.0	22.6	23.3	24.1	24.7	22.4	24.8
Day Travel	49.5	52.1	53.2	57.4	60.1	26.8	51.2

Note: Other Overnight includes camping and vacation homes (2nd homes)

Average Expenditures for Overnight Visitors, 2021p

	Travel Party		Person		Party Size	Length of Stay (Nights)
	Day	Trip	Day	Trip		
Hotel, Motel, STR	\$496	\$779	\$198	\$311	2.5	1.6
Private Home (VFR)	\$73	\$157	\$30	\$65	2.4	2.2
Other Overnight	\$167	\$456	\$60	\$164	2.8	2.7
All Overnight	\$223	\$442	\$89	\$177	2.5	2.0

Overnight Visitor Volume, 2019-2021p

	Person-Nights (000)			Party-Nights (000)		
	2019	2020	2021p	2019	2020	2021p
Hotel, Motel, STR	688	756	803	275	302	321
Private Home (VFR)	1,422	719	1,286	583	295	527
Other Overnight	435	392	411	157	141	148
All Overnight	2,545	1,867	2,500	1,014	738	996

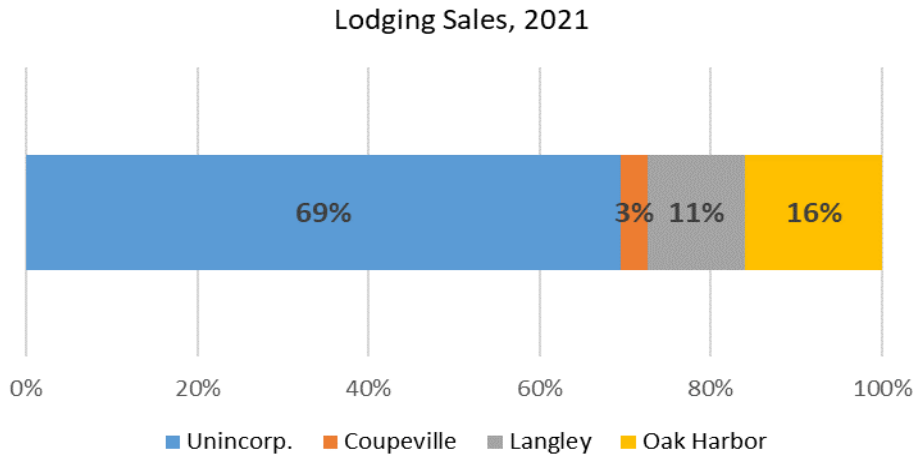
	Person-Trips (000)			Party-Trips (000)		
	2019	2020	2021p	2019	2020	2021p
Hotel, Motel, STR	438	482	512	175	193	205
Private Home (VFR)	659	333	596	270	136	244
Other Overnight	159	144	151	57	52	54
All Overnight	1,256	959	1,259	503	381	503

Brought to you by Whidbey & Camano Islands Tourism

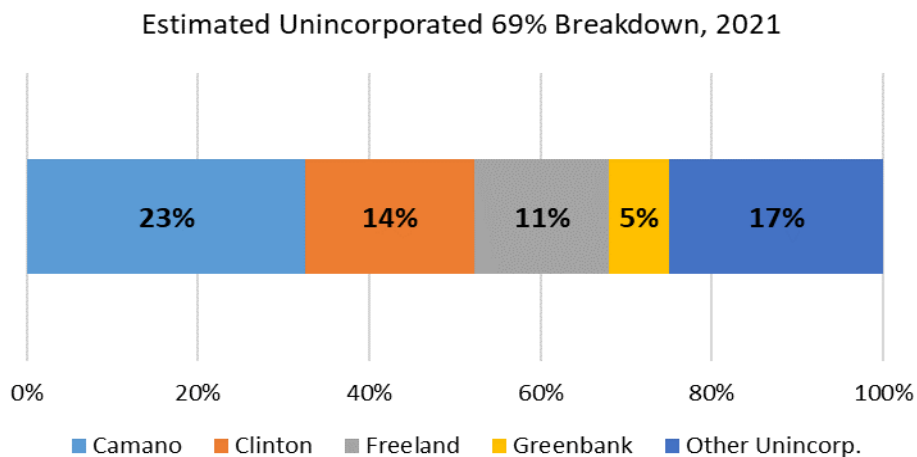
TRAVEL IMPACTS WITHIN ISLAND COUNTY

Summary breakouts for eight areas and both islands within Island County are reported in this section. Based on room tax receipts and sales tax figures from the Washington Department of Revenue, zip code county business pattern data from the U.S. Census Bureau, and short-term lodging data from AirDNA, these figures are reasonable estimates of the distribution of travel impacts within the county. As small area estimates are necessarily less precise than countywide estimates, detailed breakouts by accommodation, commodity, and industry are not shown. Visitors do not necessarily recognize geographic boundaries and may visit multiple places during their stay, due to this nature the economic impacts should be interpreted as approximate estimates.

The unincorporated section of the islands had 69 percent of the taxable lodging sales in 2021, similar to 2020. This is a 7% increase in share over 2019 (62%).



Source: Washington Department of Revenue



Source: Dean Runyan Associates, AirDNA

Areas defined as: Greenbank, zip code 98253; Freeland, zip code 98249; Clinton, zip code 98236; Camano, zip code 98282; Other Unincorp., unincorporated areas of zip codes 98260, 98239, 98277, 98278.

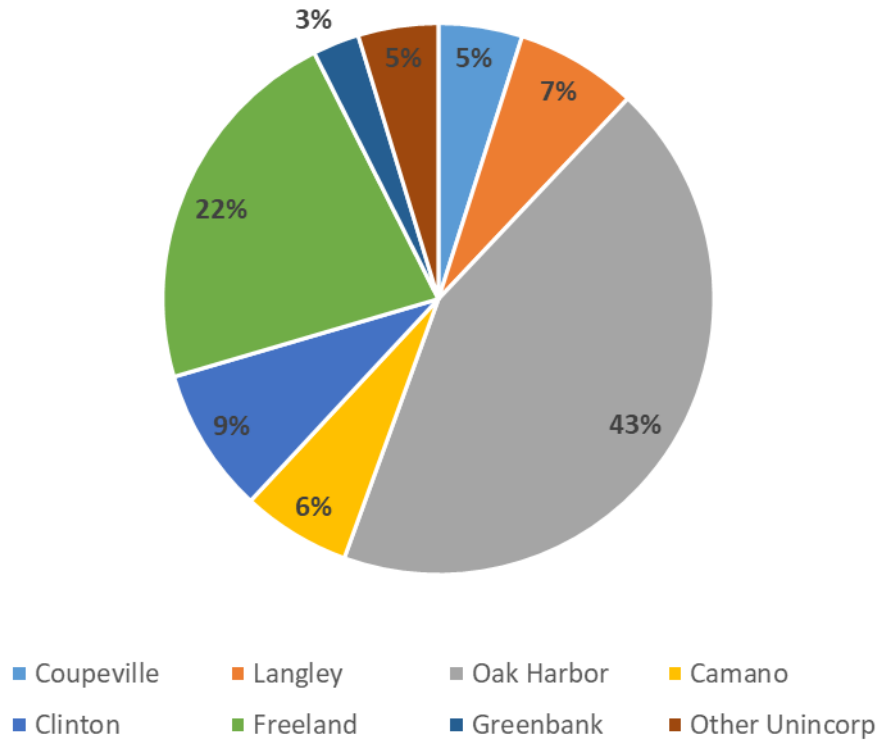
Brought to you by Whidbey & Camano Islands Tourism

Travel Impacts within Island County, 2021p

	Spending	Earnings	Employment	Tax Receipts (\$M)		
	(\$Million)	(\$Million)	Jobs	Local	State	Total
Total	273.7	77.8	2,510	9.0	18.5	27.5
Incorporated Areas	152.0	42.7	1,300	5.0	10.3	15.3
Coupeville	13.4	3.7	110	0.4	0.9	1.4
Langley	19.5	5.8	170	0.6	1.3	2.0
Oak Harbor	119.0	33.1	1,020	3.9	8.1	12.0
Unincorporated Areas	121.7	35.2	1,210	4.0	8.2	12.2
Clinton	23.3	7.3	220	0.8	1.6	2.3
Freeland	60.5	17.1	600	2.0	4.1	6.1
Greenbank	7.5	2.7	100	0.2	0.5	0.8
Other Unincorp.	12.9	4.0	110	0.4	0.9	1.3
Camano Island	17.4	4.1	180	0.6	1.2	1.8
Camano	17.4	4.1	180	0.6	1.2	1.8

Note: Camano, Clinton, Freeland, Greenbank, and Other Unincorp. are representative of the entire unincorporated area of Island County. These are broken out to give additional insights and are estimates based on the data available.

Share of Travel Spending



Brought to you by Whidbey & Camano Islands Tourism

APPENDICES

APPENDIX A. REGIONAL TRAVEL IMPACT MODEL (RTIM) METHODOLOGY

APPENDIX B: TRAVEL IMPACT INDUSTRIES MATCHED TO NAICS

**REGIONAL TRAVEL IMPACT MODEL (RTIM)
TRAVEL IMPACT ESTIMATION PROCEDURES**

TRAVEL SPENDING

Hotel, Motel, STVR. Spending on commercial accommodations by hotel and motel guests is estimated from transient lodging tax collections at the city/county jurisdictional level.

Campgrounds. Spending by campers using commercial campgrounds is estimated from the number of commercial campsites, the average occupancy of these campsites. Spending by campers using public campgrounds is estimated from visitor counts at federal, state, and locally managed campsites and recreation areas, and the average daily expenditures of visitor camp parties reported in survey data.

Private Home. Spending by private home guests staying with friends or family is determined from census data and visitor survey data. The average number of days per year visitors hosted by residents and the average daily spending of these visitors are estimated from visitor survey data.

Vacation Home. The estimated spending by vacation home owners is also based on census data and visitor survey data.

Day Travel. The share of day visits as a percentage of total travel is estimated from visitor survey data and applied to average daily spending estimates to produce day visitor spending.

Spending by visitors in other business categories, such as food and transportation, is estimated using spending distributions reported in the visitor survey data.

RELATED TRAVEL IMPACTS

Spending by travelers generates jobs, payroll, and state and local tax revenue.

Earnings generated directly from traveler expenditures are estimated from a payroll-to-receipts ratio obtained from the 2012 Economic Census and earnings estimates from the Bureau of Economic Analysis.

Employment in each business category is calculated from wage data supplied by the U.S. Department of Labor and earnings estimates from the Bureau of Economic Analysis.

Local Taxes consist of local room taxes and sales taxes attributable to visitor spending and property and sales taxes attributable to travel industry employees and businesses.

State Taxes consist of sales taxes and motor fuel taxes attributable to visitors and income and sales taxes attributable to travel industry employees.

TRAVEL IMPACT INDUSTRIES MATCHED TO NORTH AMERICAN INDUSTRY CLASSIFICATION SYSTEM

TRAVEL IMPACT INDUSTRY	NAICS INDUSTRIES* (code)
Accommodations & Food Services	Accommodations (721) Food Services and Drinking Places (722) Residential Property Managers (531311)
Arts, Entertainment & Recreation	Performing Arts, Spectator Sports (711) Museums (712) Amusement, Gambling (713) Scenic and Sightseeing Transportation (487) Miscellaneous Industries (see note**)
Retail	Food & Beverage Stores (445) Gasoline Stations (447) Clothing and Clothing Accessories Stores (448) Sporting Goods, Hobby, Book, and Music Stores (451) General Merchandise Stores (452) Miscellaneous Store Retailers (453)
Ground Transportation	Interurban and Rural Bus Transportation (4852) Taxi and Limousine Service (4853) Charter Bus Industry (4855) Passenger Car Rental (532111) Parking Lots and Garages (812930)

Notes: *Government enterprises (e.g., park systems) are included in this classification

**Includes parts of industries in other sectors (e.g., accommodation, charter bus).

A more detailed description of these industries can be found at <http://www.ntis.gov/naics>