

Island County County Travel Impacts and Visitor Volume

Visitor Spending Impacts

Amount of Visitor Spending that supports 1 Job	\$75,260
Employee Earnings generated by \$100 Visitor Spending	\$35
Local Tax Revenues generated by \$100 Visitor Spending	\$3.17

Visitor Volume

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$4,879
Additional employment if each resident household encouraged one additional overnight visitor	65

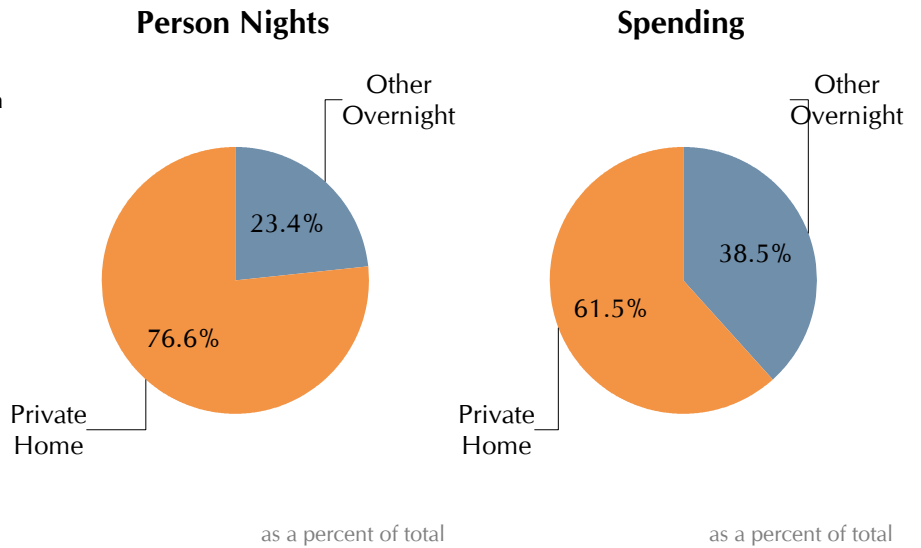
Visitor Shares

Travel Share of Total Employment (2017)*	8.0 %
Visitor Share of Taxable Sales (2017)**	13.1 %
Overnight Visitor Share (2018p)***	7.9 %

Overnight Visitor Spending and Volume

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.
 **Annual Overnight Visitor Days divided by (Resident Population) *365.

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging typically have the greatest economic impact. There is substantial variation among destinations, however. Most rural and suburban areas have high shares of private home visitation. Urban areas tend to have greater shares of hotel/motel stays.



	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (\$Millions)
Private Home	654.9	1,413.7	38.6
Other Overnight	157.5	430.9	24.1
All Overnight	1,200.8	2,453.9	165.7
Others	388.4	609.2	103.0

Note: Person Trips and Person Nights are in Thousands. Visitor Spending is in \$Millions. Details may not round to total due to rounding

Island County Direct Travel Impacts, 2010-2018p

							Ave. Annual Chg.	
Spending	2010	2012	2014	2016	2017	2018	17-18	10-18
Total (Current \$)	150.8	170.9	179.1	203.6	210.4	232.2	10.4%	5.5%
Other	8.3	9.8	8.9	6.8	7.9	9.0	13.3%	1.0%
Visitor	142.5	161.0	170.1	196.7	202.4	223.2	10.2%	5.8%
Non-transportation	126.3	141.9	152.0	180.6	184.7	202.5	9.7%	6.1%
Transportation	16.2	19.1	18.1	16.1	17.8	20.7	16.2%	3.1%
Earnings								
Earnings (Current \$)	43.0	48.6	54.8	64.0	70.6	78.5	11.2%	7.8%
Employment								
Employment	2,240	2,430	2,630	2,790	2,820	2,980	5.6%	3.6%
Tax Revenue								
Total (Current \$)	14.1	15.5	16.8	20.4	20.9	22.6	8.0%	6.1%
Local Tax Receipts	4.3	4.8	5.3	6.5	6.6	7.1	7.3%	6.3%
Visitor	2.4	2.8	3.0	3.7	3.8	4.2	10.1%	7.0%
Business or Employee	1.9	2.0	2.3	2.8	2.8	2.9	3.6%	5.3%
State Tax Receipts	9.7	10.7	11.5	13.9	14.3	15.5	8.3%	6.0%
Visitor	7.3	8.0	8.5	10.2	10.6	11.6	9.4%	5.9%
Business or Employee	2.4	2.7	3.0	3.7	3.8	4.0	5.2%	6.3%

Other spending includes resident air travel, travel arrangement and reservation services, and convention and trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental, other local ground transportation and one-way fares.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes, sales taxes, auto rental taxes and airport passenger facility charges paid by visitors, and the property tax payments and sales tax payments attributable to the travel industry income of employees and businesses.

State tax revenue includes lodging, sales and motor fuel tax payments of visitors, and the income tax and sales tax payments attributable to the travel industry income of businesses and employees.

Federal tax revenue includes motor fuel excise taxes and airline ticket taxes paid by visitors, and the payroll and income taxes attributable to the travel industry income of employees and businesses.

Island County

Travel Impacts, 2010-2018p

Total Direct Travel Spending (\$Million)

	2010	2012	2013	2014	2015	2016	2017	2018
Destination Spending	142.5	161.0	162.6	170.1	180.6	196.7	202.4	223.2
Other Travel*	8.3	9.8	9.3	8.9	7.1	6.8	7.9	9.0
Total	150.8	170.9	171.8	179.1	187.7	203.6	210.4	232.2

Visitor Spending By Commodity Purchased (\$Million)

	2010	2012	2013	2014	2015	2016	2017	2018
Accommodations	19.6	22.3	23.5	25.4	28.3	31.9	32.7	35.5
Food Service	44.2	51.1	52.2	55.5	61.1	68.6	71.5	80.7
Food Stores	19.1	21.1	21.3	22.4	23.7	24.5	24.4	25.7
Local Tran. & Gas	16.2	19.1	18.3	18.1	15.9	16.1	17.8	20.7
Arts, Ent. & Rec.	19.4	21.3	21.3	22.1	23.6	25.7	26.1	28.5
Retail Sales	24.0	26.1	26.0	26.6	28.1	29.9	29.9	32.1
Total	142.5	161.0	162.6	170.1	180.6	196.7	202.4	223.2

Industry Earnings Generated by Travel Spending (\$Million)

	2010	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	22.6	26.2	28.4	31.0	33.3	37.5	43.3	48.0
Arts, Ent. & Rec.	10.9	12.3	12.8	12.8	12.9	14.0	14.2	16.1
Retail**	7.2	7.7	8.0	8.4	9.2	9.6	10.0	10.9
Ground Tran.	2.0	2.0	2.0	2.1	2.3	2.4	2.6	3.1
Other Travel*	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4
Total	43.0	48.6	51.7	54.8	58.0	64.0	70.6	78.5

Industry Employment Generated by Travel Spending (Jobs)

	2010	2012	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	1,010	1,090	1,150	1,230	1,250	1,360	1,450	1,490
Arts, Ent. & Rec.	840	940	1,000	990	920	990	930	1,020
Retail**	300	320	330	330	350	350	360	380
Ground Tran.	70	70	70	70	70	70	70	70
Other Travel*	10	10	10	10	10	10	10	10
Total	2,240	2,430	2,550	2,630	2,610	2,790	2,820	2,980

Tax Receipts Generated by Travel Spending (\$Million)

	2010	2012	2013	2014	2015	2016	2017	2018
Local Tax Receipts	4.3	4.8	5.0	5.3	5.8	6.5	6.6	7.1
Visitor	2.4	2.8	2.9	3.0	3.3	3.7	3.8	4.2
Business or Employee	1.9	2.0	2.2	2.3	2.5	2.8	2.8	2.9
State Tax Receipts	9.7	10.7	10.9	11.5	12.4	13.9	14.3	15.5
Visitor	7.3	8.0	8.1	8.5	9.2	10.2	10.6	11.6
Business or Employee	2.4	2.7	2.8	3.0	3.3	3.7	3.8	4.0
Total Local & State Receipts	14.1	15.5	16.0	16.8	18.2	20.4	20.9	22.6

Details may not add to total due to rounding. * Other Travel includes ground transportation and air travel impacts for travel to other Washington visitor destinations and travel arrangement services. ** Retail includes gasoline. Federal tax receipts not included.

Island County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2010-2018p

	2010	2012	2013	2014	2015	2016	2017	2018
Total Destination Spending	142.5	161.0	162.6	170.1	180.6	196.7	202.4	223.2
All Overnight	99.8	114.5	116.1	122.2	131.1	144.6	149.3	165.7
Hotel, Motel, STVR*	48.6	60.0	61.8	66.4	74.3	86.2	89.7	103.0
Private Home	31.5	33.3	33.2	34.2	34.8	35.7	36.2	38.6
Other Overnight	19.7	21.2	21.1	21.6	22.0	22.6	23.3	24.1
Day Travel	42.6	46.5	46.4	47.9	49.5	52.1	53.2	57.4

Average Expenditures for Overnight Visitors, 2018p

	Travel Party		Person		Party Size	Length of Stay (Nights)
	Day	Trip	Day	Trip		
Hotel, Motel, STVR*	\$426	\$669	\$170	\$267	2.5	1.6
Private Home	\$67	\$144	\$27	\$59	2.4	2.2
Other Overnight	\$155	\$425	\$56	\$153	2.8	2.7
All Overnight	\$170	\$346	\$68	\$138	2.5	2.0

Overnight Visitor Volume, 2016-2018p

	Person-Nights (000)			Party-Nights (000)		
	2016	2017	2018	2016	2017	2018
Hotel, Motel, STVR*	521	532	605	208	213	242
Private Home	1,381	1,363	1,411	566	559	579
Other Overnight	422	425	431	152	153	155
All Overnight	2,323	2,320	2,447	926	924	975

	Person-Trips (000)			Party-Trips (000)		
	2016	2017	2018	2016	2017	2018
Hotel, Motel, STVR*	332	339	386	133	135	154
Private Home	640	631	654	262	259	268
Other Overnight	154	155	157	56	56	57
All Overnight	1,126	1,126	1,197	450	450	479

"Hotel, Motel, STVR*" category includes all lodging where a lodging tax is collected except campgrounds. "Other Overnight" category includes campgrounds and vacation homes.