

Economic Impacts of Travel

Island County, WA 2021 Preliminary

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Travel Impacts / Island County, Washington

Interpretation

- Economic impact measurements reported represent only direct economic effects.
- 2021 estimates are preliminary due to incomplete source data.
- Employment estimates reflect full and part-time jobs, not employed individuals.



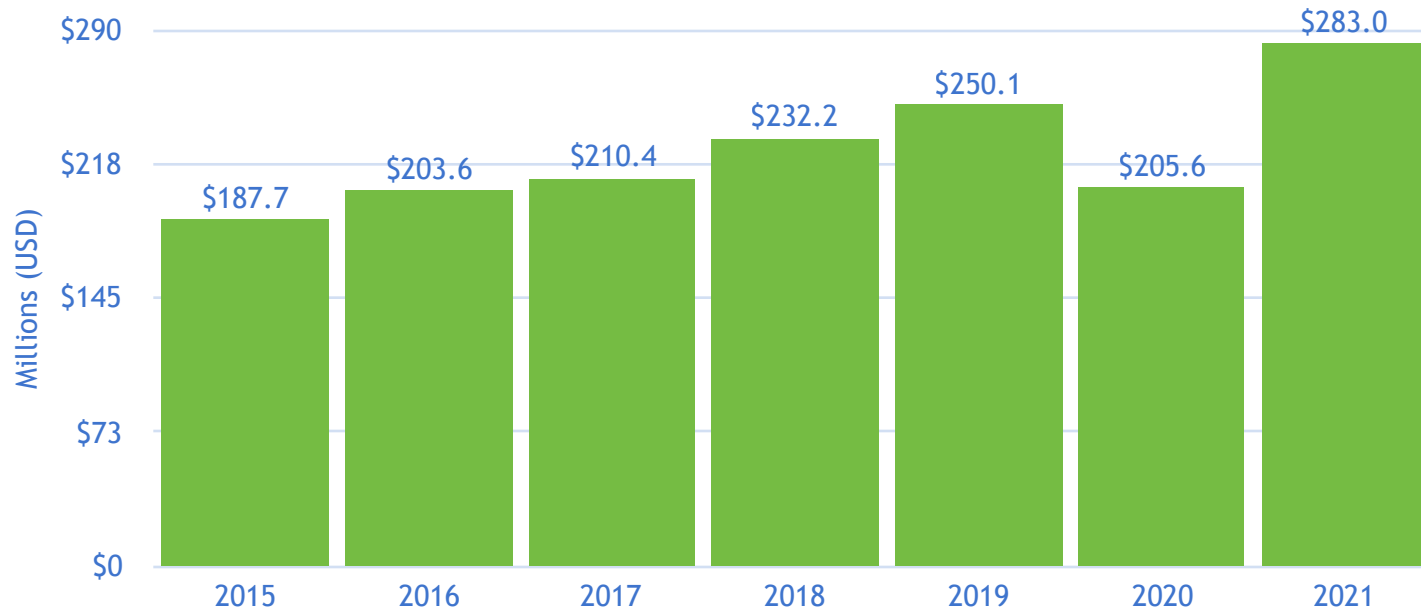
Spending



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Island County

Direct Travel Spending



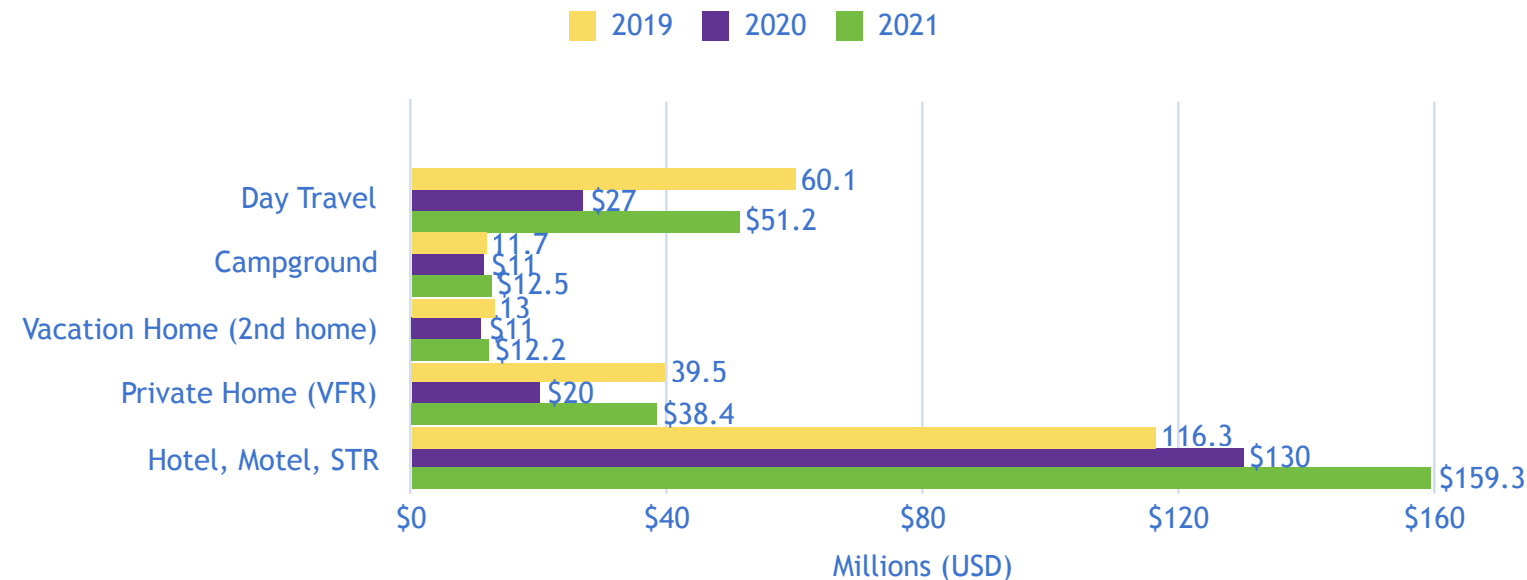
OBSERVATIONS

Direct travel spending increased 37.6% in 2021, exceeding 2019 levels of activity.

Source: Dean Runyan Associates

Island County

2019-2021 Spending by Accommodation Type

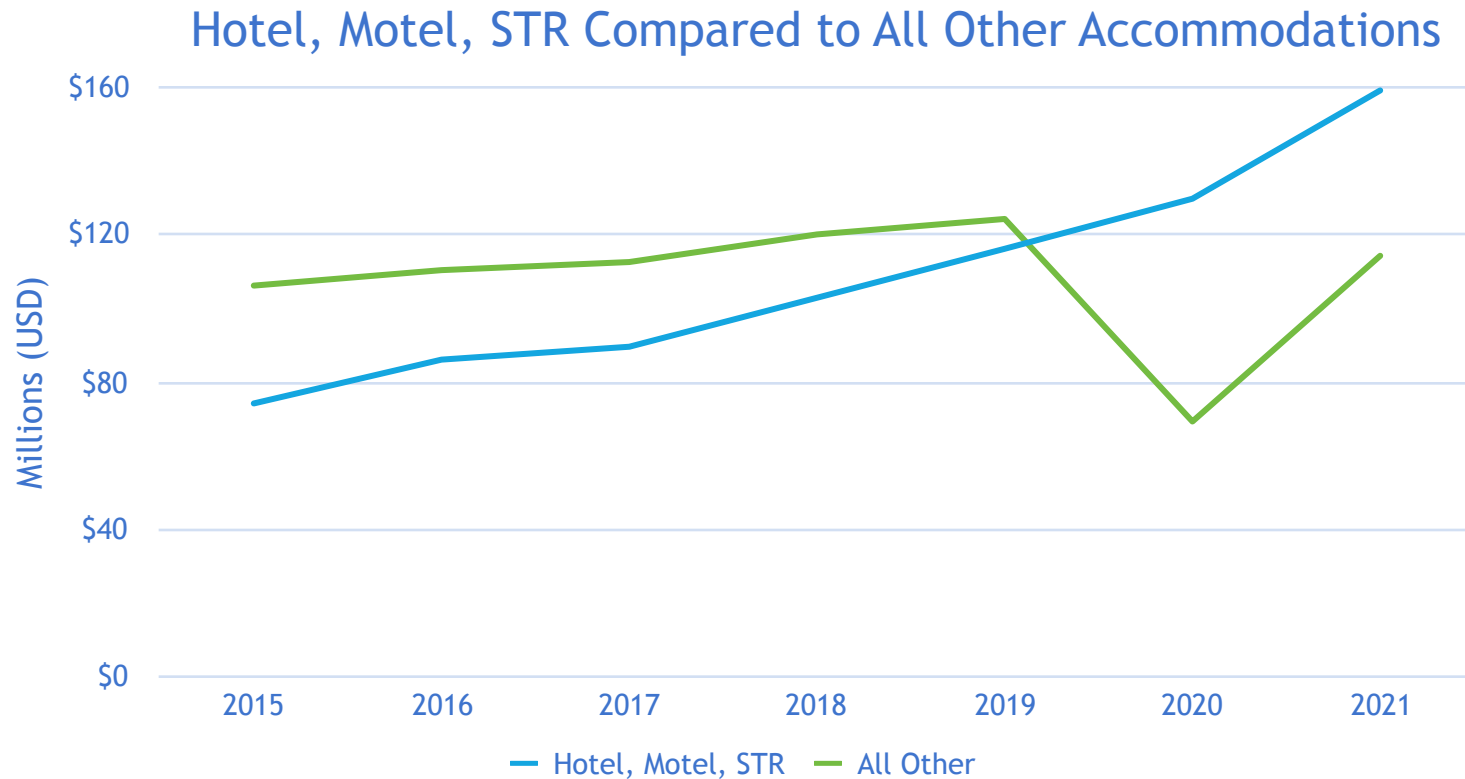


OBSERVATIONS

Visitors who stay in Hotels, Motels, or Short Term Rentals contribute 58% of spending in 2021

Source: Dean Runyan Associates

Island County



OBSERVATIONS

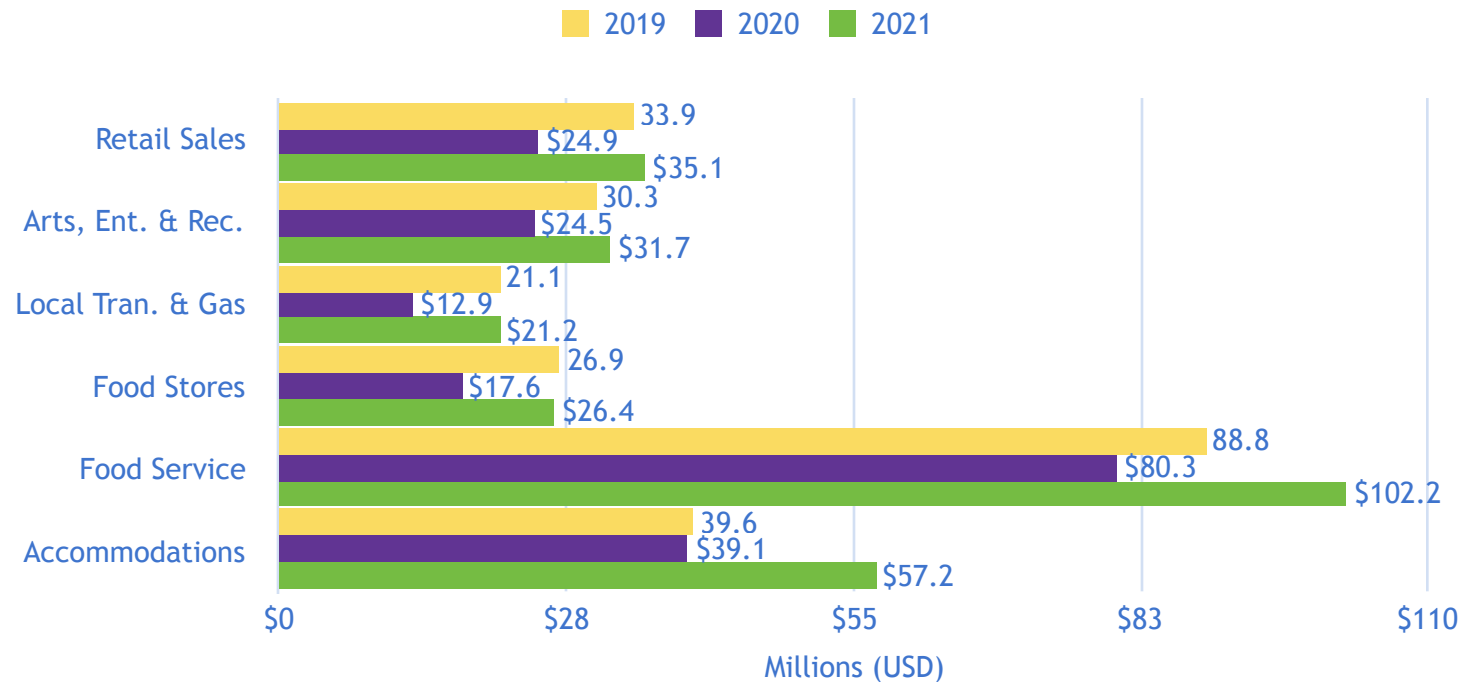
Hotel, Motel, STR visitors spent **more** in 2021. Year over year growth of **22%**.

Spending by other visitor types recovered to **92%** of 2019 levels of activity.

Source: Dean Runyan Associates

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Spending by Commodity Type



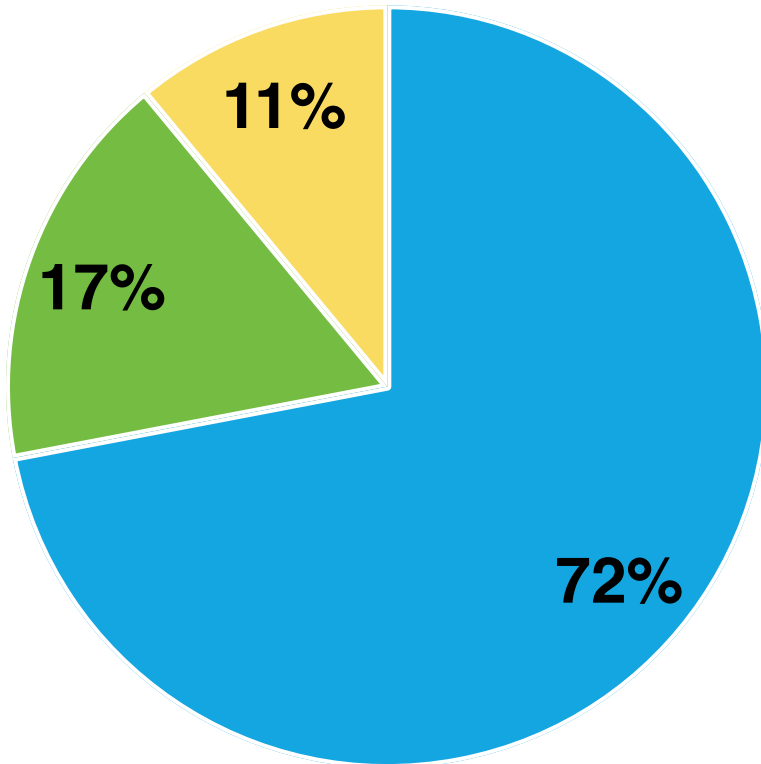
OBSERVATIONS

In 2021 an additional \$74.4 million was spent compared to 2020. Approximately 54% of that gain came from accommodations and food service sales.

Source: Dean Runyan Associates

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2021 Spending



OBSERVATIONS

Hotel, Motel, Short Term Rental visitors continue to have a higher share of spend, 72% in 2021. (Hotel, Motel, STR was 64% of spend in 2019, Private Home (VFR) was 22%)

- Hotel, Motel, STR
- Private Home (VFR)
- Other Overnight

Source: Dean Runyan Associates

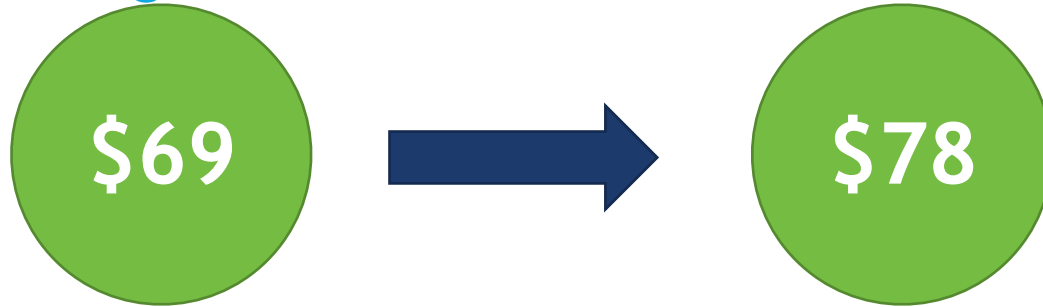


Employment & Earnings

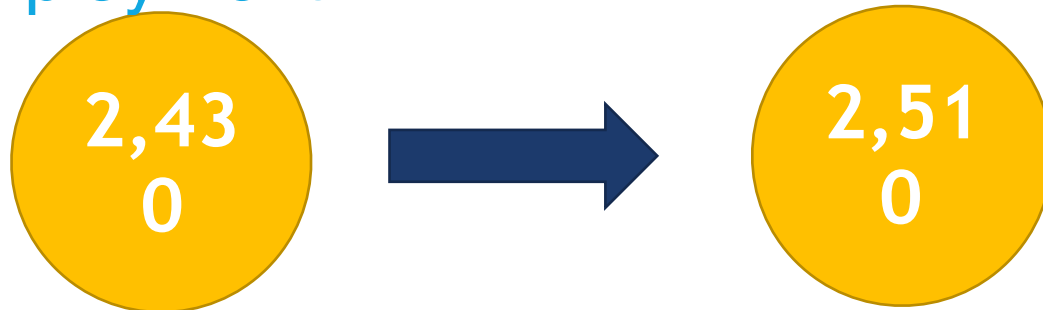
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Earnings



Employment



Source: Dean Runyan Associates

OBSERVATIONS

Employee and sole proprietor earnings increased 13%.

Employment increased 3%.
Approximately 80 jobs were gained.

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Employment

Industry	2019	2020	2021	Chg. 20/21	Chg. 19/21
Accommodations & Food Service	1,510	1,200	1,260	5%	-17%
Arts, Ent. & Rec.	1,040	810	810	0%	-22%
Retail**	390	340	370	9%	-5%
Transportation	80	70	60	-14%	-25%
Other Travel	10	10	10	-16%	-20%

Source: Dean Runyan Associates, Bureau of Labor Statistics
Percent calculated on unrounded figures



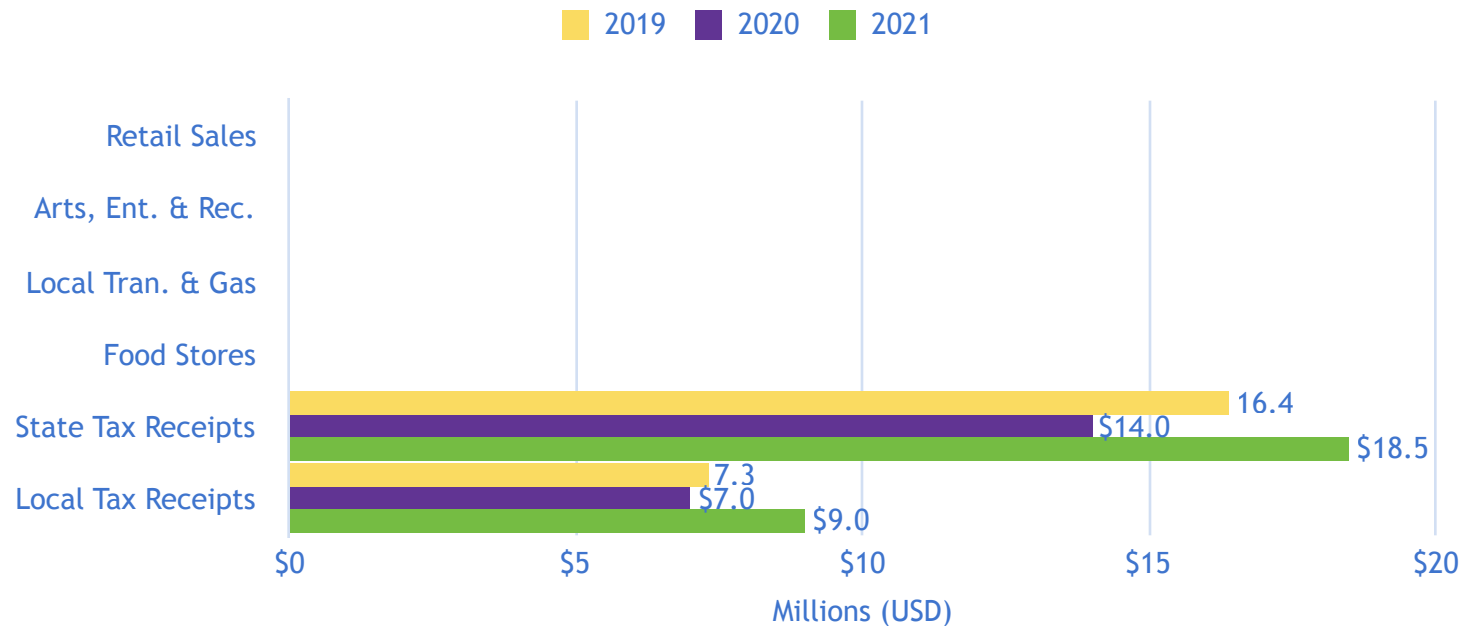


Tax Receipts

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Tax Receipts Generated by Travel Spending



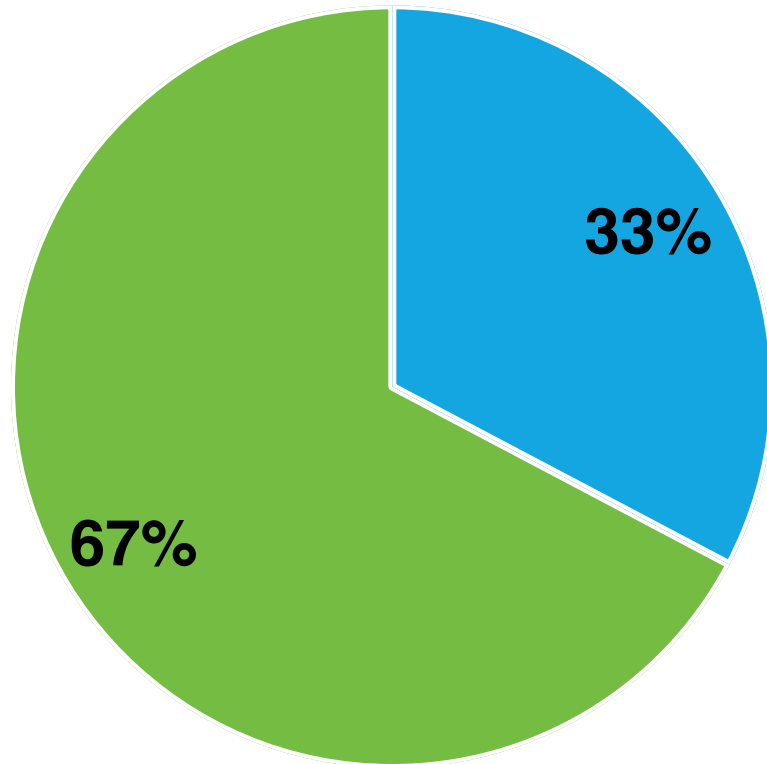
OBSERVATIONS

Local taxes increased 29%, supported by general increases in visitor spending in **2021**.

Source: Dean Runyan Associates

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2021 Travel Tax Receipts



OBSERVATIONS

Local tax receipts make up 33% of all tax receipts generated by travel spending. In 2019 local tax receipts was 31% of generated taxes.



Source: Dean Runyan Associates, Washington State Department of Revenue

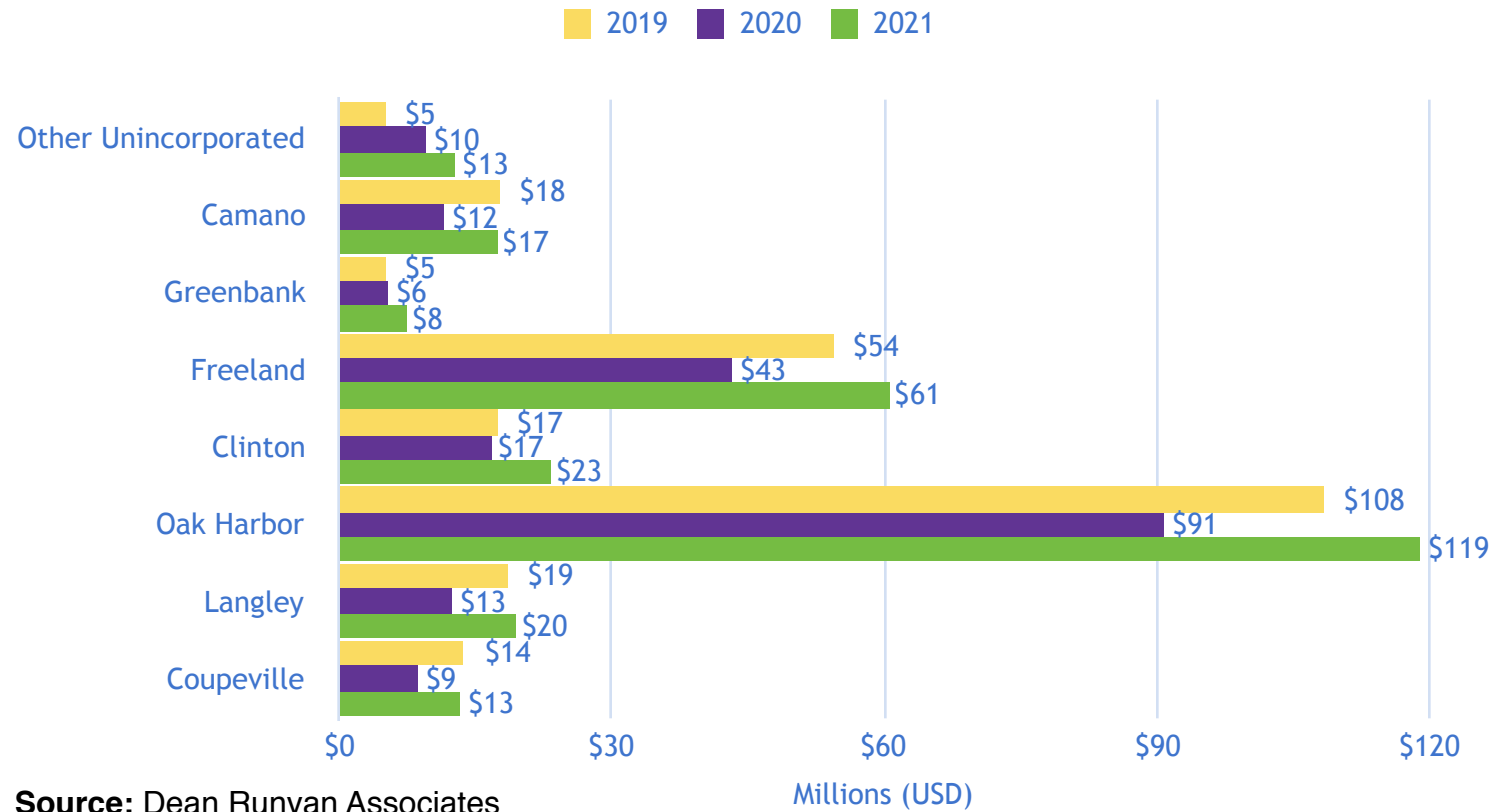
Travel Impacts within Island County

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Three white diagonal bars of increasing height, positioned in the bottom right corner of the slide, creating a sense of upward movement or growth.

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2019-2021 Spending by Area

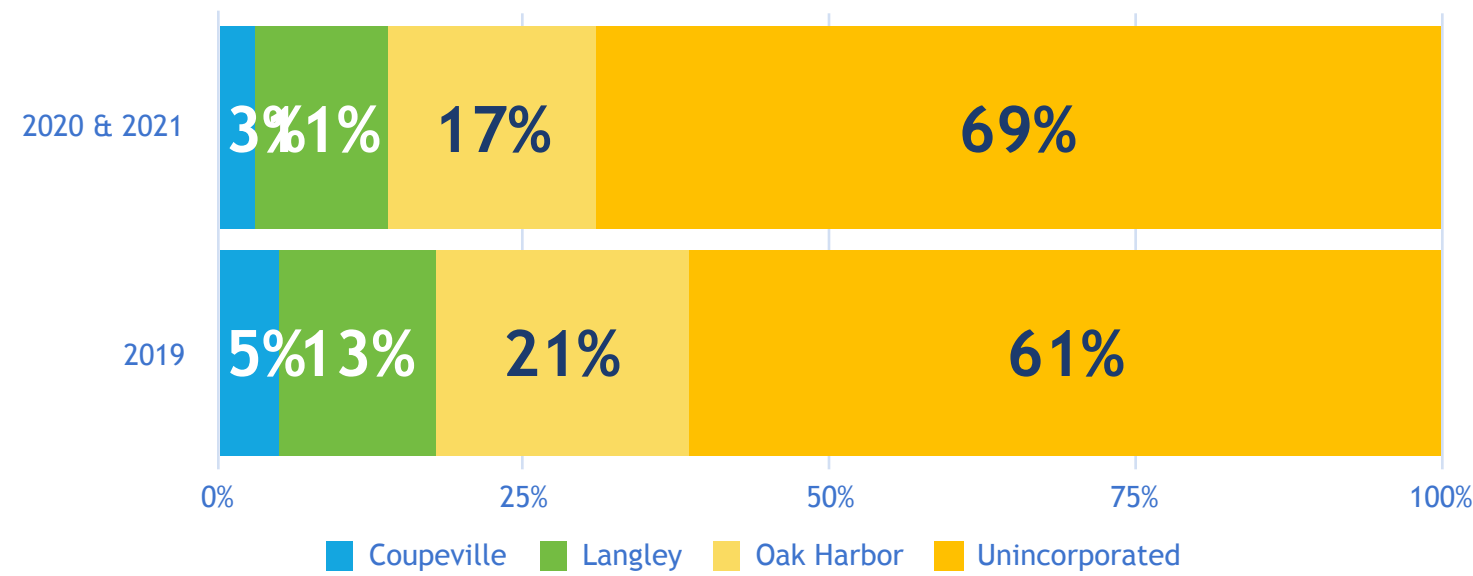


OBSERVATIONS

Travel impacts vary across both islands. In 2021 not all areas except for Coupeville and Camano saw spending activity exceed 2019.

Island County

Estimated Lodging Sales Percent by Area



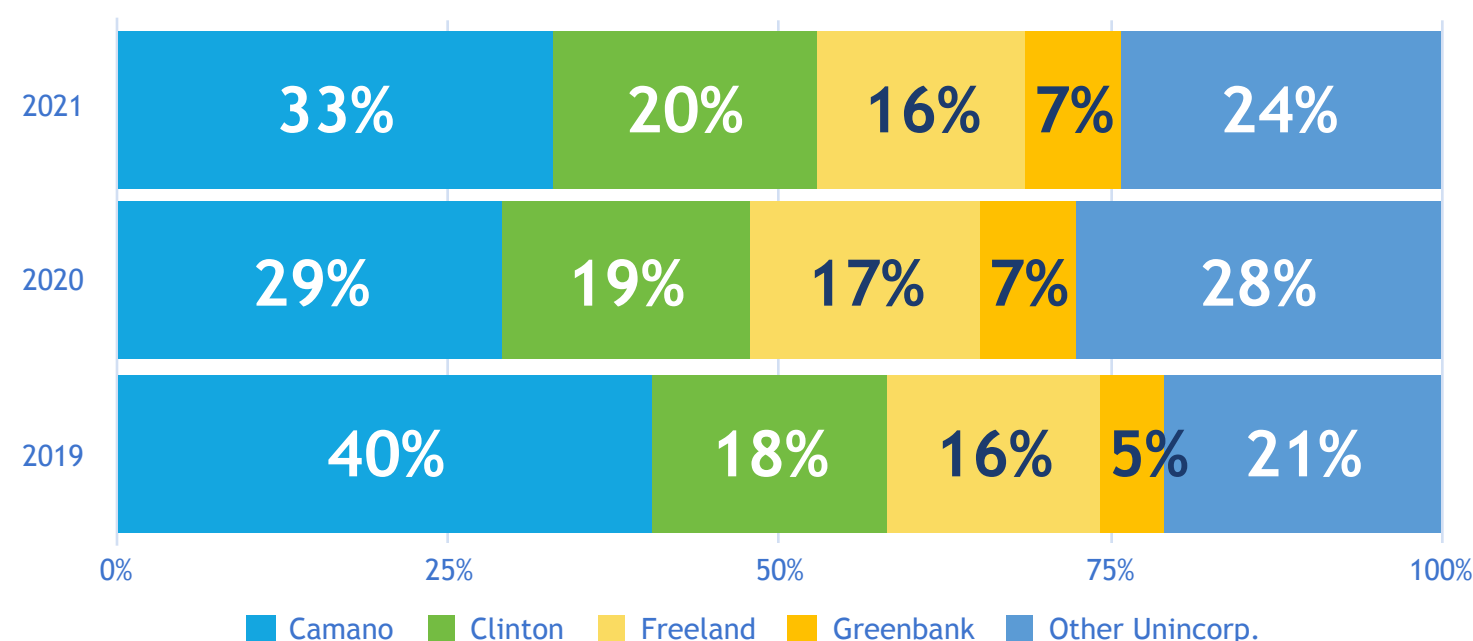
OBSERVATIONS
The share of lodging sales shifted towards the unincorporated areas in 2020 and remained similar in 2021.

Source: Dean Runyan Associates, Washington Department of Revenue



Island County

Estimated Lodging Sales Percent by Unincorporated Area



OBSERVATIONS
As seen in the estimated impacts, the Other Unincorporated areas have grown in terms of lodging sales as a percentage of all sales in Unincorporated Island County.

Source: Dean Runyan Associates, AirDNA, Washington Department of Revenue



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