

Accommodations

Taxable accommodation sales indicate trends in traveler and tourist spending across the state. In 2015, \$1.57 billion was spent on accommodations in the state of Utah, a 40 percent increase from 2007. Accommodations include hotels, motels, bed and breakfasts, campgrounds and similar businesses.

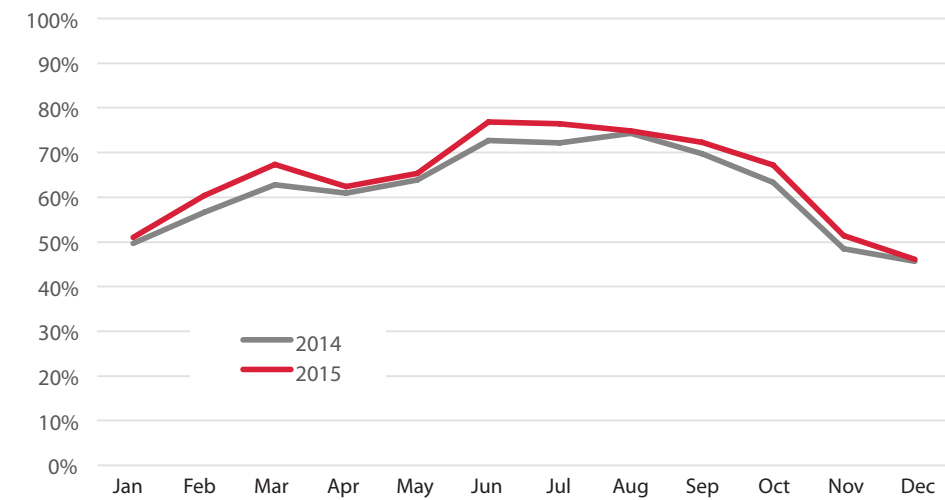
Based on hotel and lodging data provided by Smith Travel Research, Utah's average occupancy rates experienced year-over-year increases in all 12 months of 2015, with the greatest increases reported in March, June and July. Utah hotels' average daily rates and revenue per available room surpassed 2014 figures as well.

Average Daily Room Rates by Top Travel and Tourism Counties

| County | 2015 | 2014 | % Change |
|-------------------------|----------|----------|----------|
| Garfield-San Juan-Wayne | \$100.04 | \$96.73 | 3.4% |
| Grand | \$132.99 | \$121.25 | 9.7% |
| Salt Lake | \$104.52 | \$98.06 | 6.6% |
| Summit-Wasatch | \$230.72 | \$217.71 | 6.0% |
| Washington | \$100.93 | \$97.65 | 3.4% |

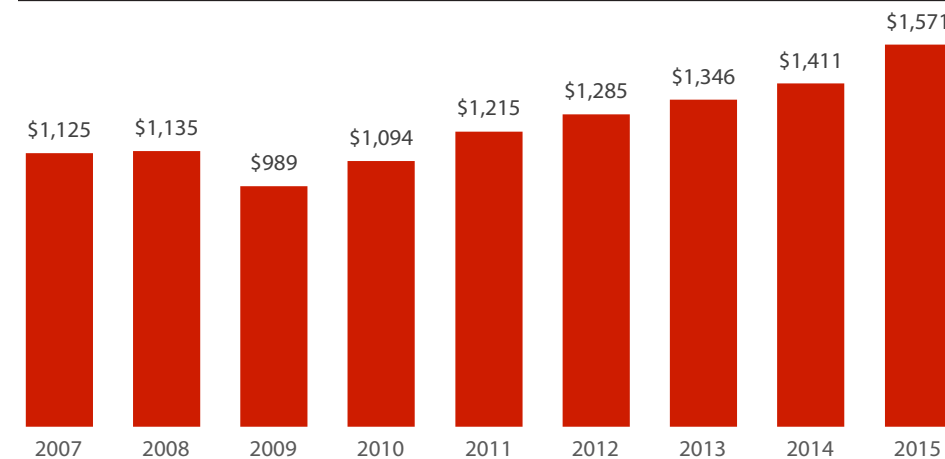
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Average Statewide Occupancy Rates by Month



Source: STR, Inc. Reproduction or other pre-use of this data without the express written permission of STR is strictly prohibited.

Total Taxable Accommodations Sales (\$ millions of 2015 dollars)



Source: Kem C. Gardner Policy Institute analysis of Utah State Tax Commission data

| STATEWIDE INDICATORS | 2014 | 2015 | Change 2014-2015 |
|----------------------|-----------|-----------|------------------|
| Utah Population | 2,997,404 | 3,054,806 | 1.9% |

| Employment, Spending & Wages | 2014 | 2015 | Change 2014-2015 |
|--|-----------|-----------|------------------|
| Estimated Traveler Spending | \$7,982 | \$8,169 | 2.3% |
| Total Employment, All Industries ¹ (Private Sector) | 1,097,465 | 1,144,235 | 4.3% |
| Total Wages, All Industries ² (Private Sector, \$ millions) | \$46,645 | \$50,177 | 7.6% |
| Total Tourism-Related Employment | 137,200 | 142,500 | 3.9% |
| Total Tourism-Related Wages (\$ millions) | \$3,936 | \$4,280 | 8.7% |
| Total Leisure & Hospitality Employment (Private Sector) | 128,067 | 133,660 | 4.4% |
| Total Leisure & Hospitality Wages (Private Sector, \$ millions) | \$2,195 | \$2,407 | 9.7% |
| Leisure & Hospitality Share of Total Employment (Private Sector) | 11.7% | 11.7% | 0.0% |
| Total Leisure & Hospitality Taxable Sales (\$ millions) | \$6,035 | \$6,833 | 13.2% |

| Utah Accommodations Industry | 2014 | 2015 | Change 2014-2015 |
|--|----------|----------|------------------|
| Hotel/Motel Occupancy Rates ³ | 61.8% | 64.4% | 4.2% |
| Hotel/Motel Average Daily Rate ⁴ | \$102.05 | \$107.80 | 5.6% |
| Hotel/Motel Revenue Per Available Room ⁵ | \$62.26 | \$68.44 | 9.9% |
| Accommodations Industry Employment (Private) | 19,270 | 19,802 | 2.8% |
| Accommodations Industry Wages (Private, \$ millions) | \$446 | \$487 | 9.2% |
| Accommodations - Taxable Sales (\$ millions) | \$1,406 | \$1,571 | 11.7% |

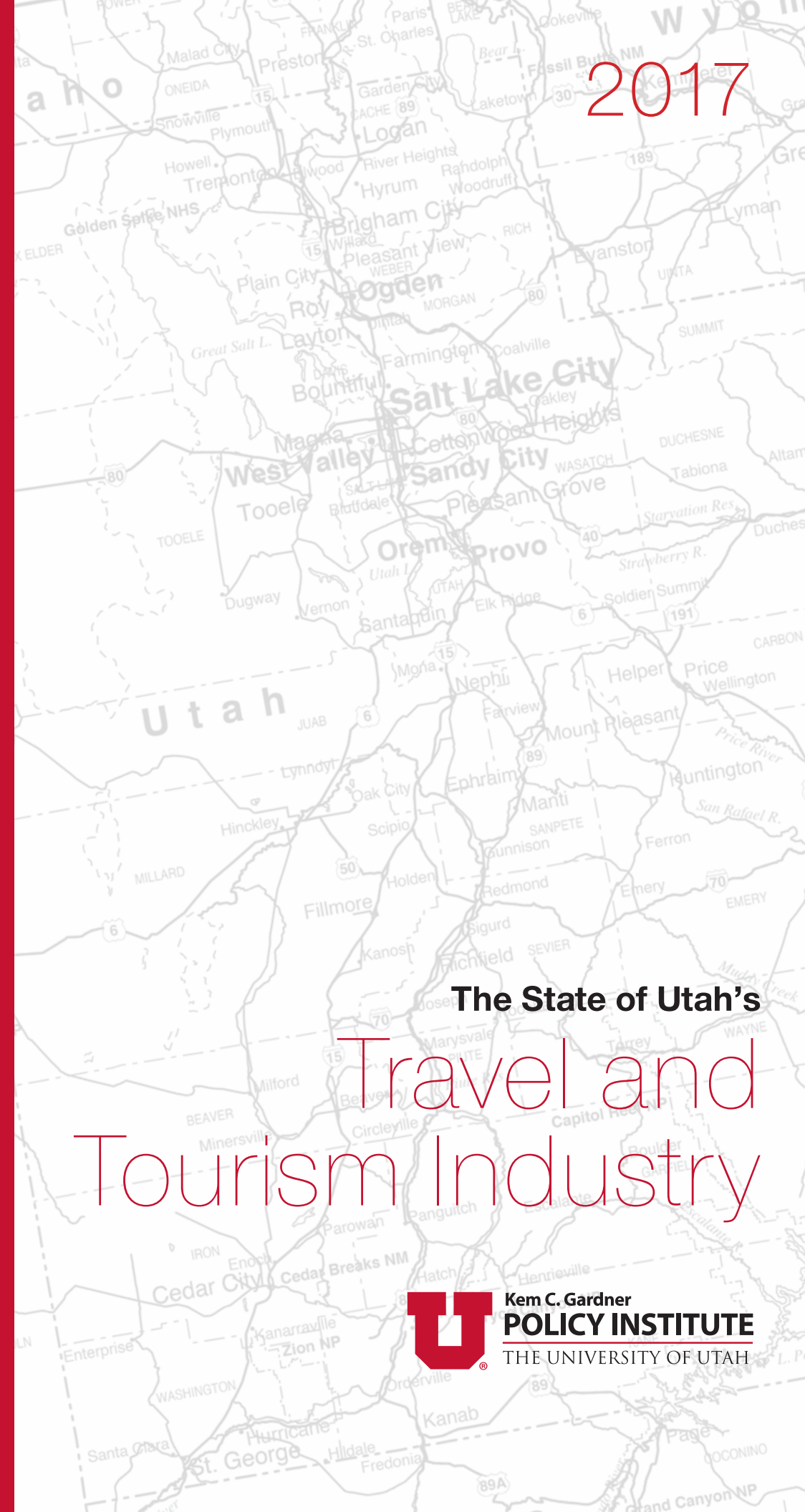
| Tourism-Related Tax Revenues (\$ millions) | 2014 | 2015 | Change 2014-2015 |
|---|--------|--------|------------------|
| Total TRCC Tax Revenue | \$58.3 | \$61.9 | 6.1% |
| Total TRT Tax Revenue (County & Municipality) | \$51.0 | \$56.3 | 10.4% |
| Total Motor Vehicle Rental Tax Revenue | \$5.3 | \$5.4 | 9.2% |
| Total Resort Communities Sales Tax Revenue | \$18.9 | \$20.4 | 8.1% |

| Statewide Visitation Counts | 2014 | 2015 | Change 2014-2015 |
|---|------------|------------|------------------|
| Utah Skier Days | 3,946,762 | 4,457,575 | 12.9% |
| Total National Park Recreation Visits | 7,239,149 | 8,369,533 | 15.6% |
| Arches National Park | 1,284,767 | 1,399,247 | 8.9% |
| Bryce Canyon National Park | 1,435,741 | 1,745,804 | 21.6% |
| Canyonlands National Park | 542,431 | 634,607 | 17.0% |
| Capitol Reef National Park | 786,514 | 941,029 | 19.6% |
| Zion National Park | 3,189,696 | 3,648,846 | 14.4% |
| Total National Place Recreation Visits ⁶ | 4,615,945 | 4,862,902 | 5.4% |
| Salt Lake International Airport - Total Passengers | 21,141,610 | 22,141,026 | 4.7% |
| Utah Amtrak Passenger Rail - Total Ridership (Federal FY) | 51,470 | 46,081 | -10.5% |

Sources: Kem C. Gardner Policy Institute, U.S. Travel Association, Utah Department of Workforce Services, STR, Inc., U.S. Bureau of Land Management, Utah State Tax Commission, Ski Utah, National Park Service, Utah Office of Tourism, S.L.C. International Airport, Amtrak.

- 1 Employment includes annual average employee full- and part-time private jobs (does not include proprietors).
- 2 Wages includes annual average full- and part-time employee wages (does not include proprietors).
- 3, 4, 5 Kem C. Gardner Policy Institute analysis of STR, Inc., data. Reproduction or other pre-use of this data without the express written permission of STR is strictly prohibited.
- 6 Visitation data for Flaming Gorge NRA is not included.

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Visitors and Spending

In 2015, tourists and travelers spent a record \$8.17 billion in Utah. Of that total spending, \$6.98 billion was attributed to nonresident visitors who spent the majority of their dollars on traveling within the state (including gasoline purchases, car rentals, transportation fares and parking), lodging in paid accommodations and dining. Additional nonresident visitor purchases included retail items and groceries, as well as arts, entertainment and recreation-related activities.

The majority of Utah's domestic nonresident visitation came from western states like California, Idaho and Nevada. In 2015, Utah's largest international markets were Canada, China and France.

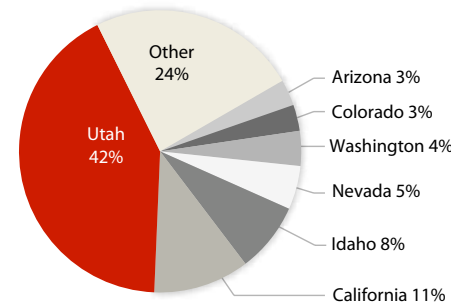
Utah's ski resorts reported a record number of skier days during the 2015-2016 ski season (4.5 million) and Utah's five national parks experienced a record 8.4 million visits in 2015. Preliminary National Park Service data indicates there were more than 10 million recreation visits to Utah national parks in 2016.

Total Direct Visitor Spending (\$ millions)



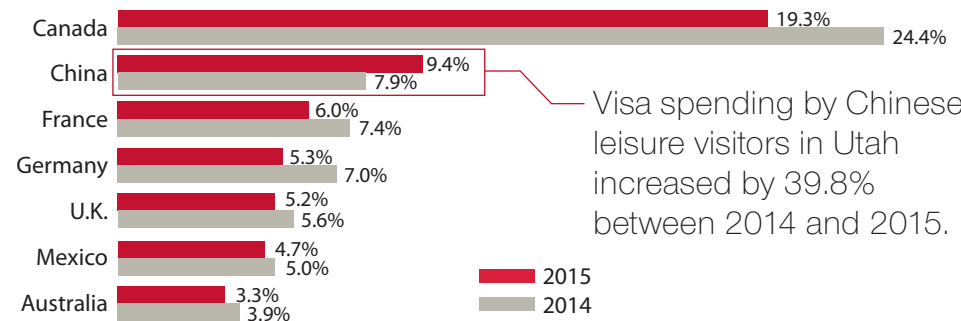
Source: U.S. Travel Association
* Includes resident, domestic nonresident and international visitors

Share of Total Visitors by State, 2015



Source: TNS Global

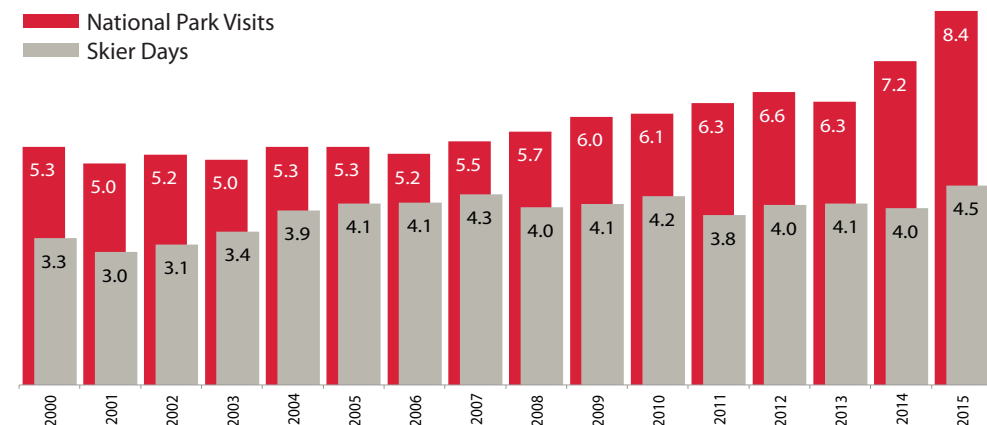
Share of Estimated International Visitor Visa Card Spending by Country



Visa spending by Chinese leisure visitors in Utah increased by 39.8% between 2014 and 2015.

Kem C. Gardner Policy Institute's estimates are based on and extrapolated from aggregate depersonalized card usage data provided by VisaVue® Travel for the calendar years of 2014 and 2015.

Utah Total Skier Days and National Park Recreation Visits (millions)



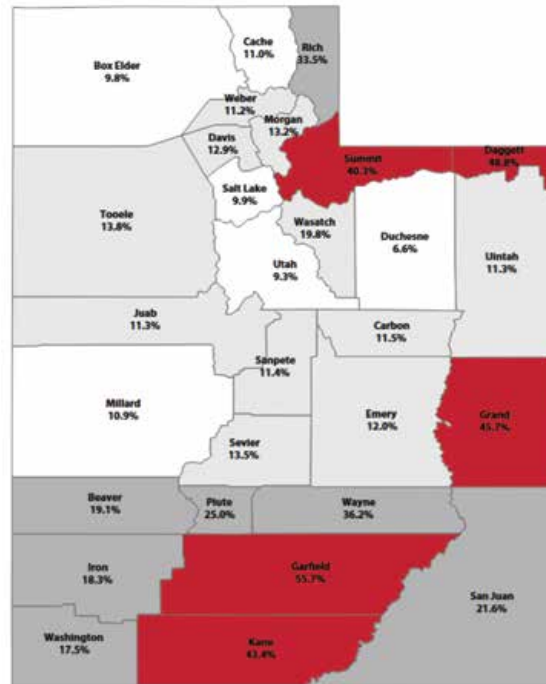
Sources: U.S. National Park Service and Ski Utah

Travel and Tourism-Related Employment

Travel and tourism-related employment includes jobs in transportation, accommodations, restaurants, the arts, entertainment and recreation industries and retail. In 2015, Utah reported approximately 76,500 direct travel and tourism jobs — a 4 percent increase over 2014 — and ranked ninth as a major industry in Utah. One out of every 10 Utah jobs was supported by tourism and travel.

Although data are unavailable to estimate travel and tourism-related jobs on a county-by-county basis, it is possible to analyze total leisure and hospitality jobs as a share of total jobs in each county. Around 65 percent of all travel and tourism jobs are part of the leisure and hospitality sector while the rest are categorized under a variety of other sectors, including retail trade, transportation and information. In 2015, counties with the largest share of private leisure and hospitality jobs to total private jobs were Garfield, Daggett, Grand, Kane, Summit, Wayne and Rich.

Private Leisure and Hospitality Sector Jobs as a Percent of Total Private Employment, 2015

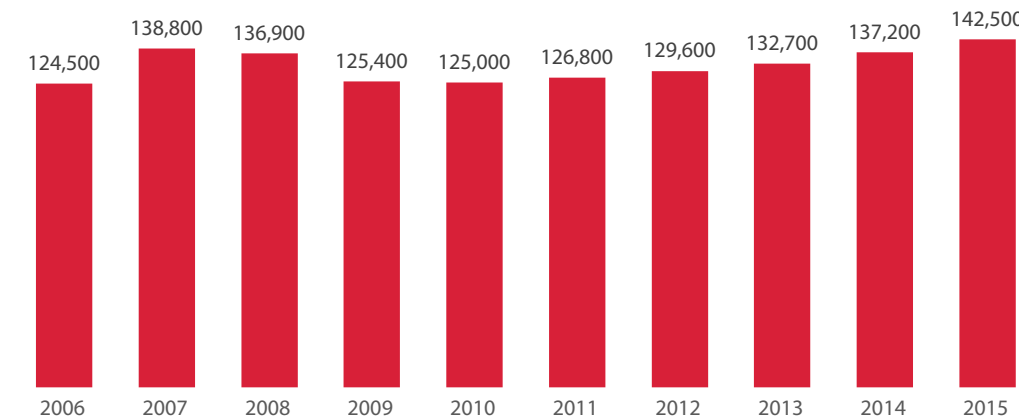


Source: Kem C. Gardner Policy Institute analysis of Utah Department of Workforce Services data

Growth in Private Leisure and Hospitality Employment, Top Ten Counties, 2011-2015

| | |
|------------|-------|
| Rich | 30.4% |
| Morgan | 29.4% |
| Utah | 27.0% |
| Daggett | 26.9% |
| Kane | 24.6% |
| Grand | 21.5% |
| Cache | 20.2% |
| Davis | 19.4% |
| Washington | 18.2% |
| Salt Lake | 17.5% |

Total Tourism-Generated Jobs



Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics data
Note: Includes private and public jobs and economic multiplier effects.

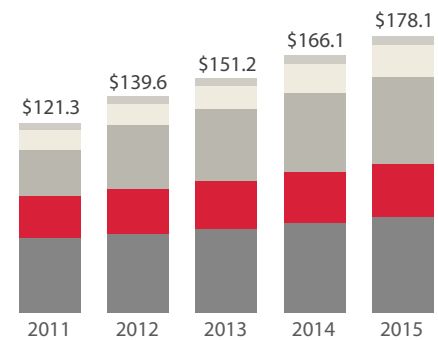
Tax Revenue

Direct visitor spending of \$8.17 billion in 2015 generated a record \$1.15 billion in estimated total tax revenue, of which \$660.7 million was state and \$488.9 million was local tax revenue.

A significant portion of Utah's total travel and tourism-generated tax revenue is composed of a variety of tourism-related state and local tax revenues. These include Utah's Tourism, Recreation, Cultural, and Convention Tax (comprising restaurant, motor vehicle leasing and Salt Lake County room rental tax); Transient Room Tax (both county and municipal); a statewide Motor Vehicle Rental Tax; the Zoo, Arts and Parks Tax; and Resort Communities Sales Tax (qualifying municipalities). Total tourism-related sales tax revenue grew 7 percent between 2014 and 2015 and has grown 46 percent since 2011.

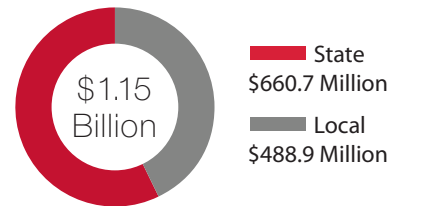
The counties of Sanpete, Weber, Tooele, Rich and Cache had the greatest year-over-year increases in transient room tax from 2014 to 2015. Salt Lake County collected the most transient room tax revenues (\$16.5 million), followed by Summit County (\$7.7 million) and Washington County (\$5.6 million).

Total Tourism-Related Tax Revenue (\$ millions of 2015 dollars)



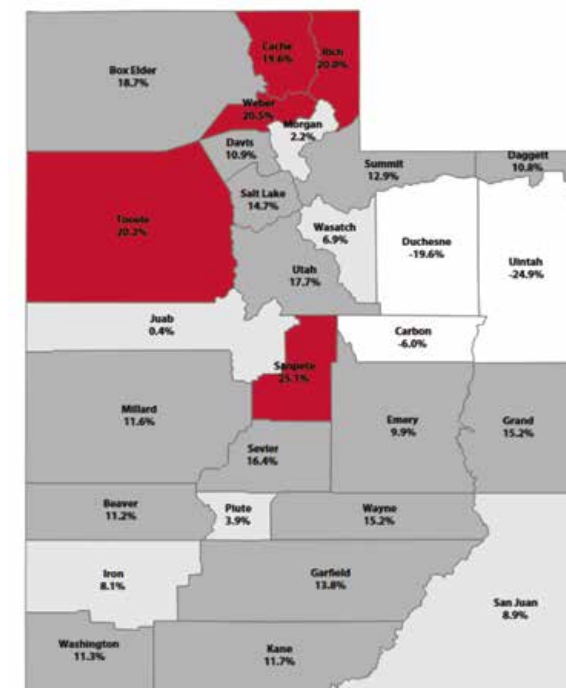
Statewide Motor Vehicle Rental Tax
Resort Communities Sales Tax
Transient Room Tax
Zoo, Arts, Parks Tax
Tourism, Recreation, Cultural, and Convention Tax

Total Tourism-Generated Tax Revenue, 2015



Note: Includes economic multiplier effects

Annual Percent Change in Transient Room Tax Revenue*, 2014-2015



Total County Transient Room Tax, Top Ten Counties, 2015 (\$ millions)

| | |
|------------|--------|
| Salt Lake | \$16.5 |
| Summit | \$7.7 |
| Washington | \$5.6 |
| Grand | \$3.9 |
| Utah | \$2.9 |
| Kane | \$1.9 |
| Garfield | \$1.6 |
| Wasatch | \$1.5 |
| Davis | \$1.5 |
| Weber | \$1.4 |

*Includes County TRT and Municipal TRT
Source (all above figures): Kem C. Gardner Policy Institute analysis of Utah State Tax Commission data