

# Accommodations

**T**axable accommodation sales indicate trends in spending by travelers and tourists across the state. In 2017 visitors spent \$1.93 billion on accommodations in the state of Utah, a 9 percent year-over-year increase and a 39 percent increase from 2013. Accommodations include hotels, motels, bed and breakfasts, Airbnbs, campgrounds, and similar businesses.

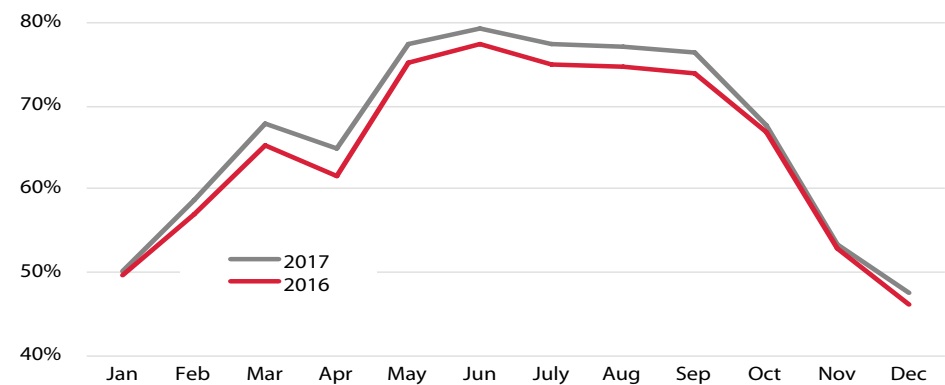
Based on hotel and lodging data provided by Smith Travel Research, Utah's statewide average occupancy rates experienced annual increases in all months of 2017, with the greatest increases reported in March, April, and September. Utah hotels' average daily room rates increased 4 percent and average revenue per available room increased 7 percent from the previous year.

## Average Daily Room Rates by Top Travel and Tourism Counties

| County                  | 2016     | 2017     | % Change |
|-------------------------|----------|----------|----------|
| Garfield-San Juan-Wayne | \$107.68 | \$114.24 | 6.1%     |
| Grand                   | \$145.74 | \$154.00 | 5.7%     |
| Salt Lake               | \$107.41 | \$113.19 | 5.4%     |
| Summit-Wasatch          | \$245.57 | \$252.71 | 2.9%     |
| Washington              | \$112.08 | \$115.70 | 3.2%     |

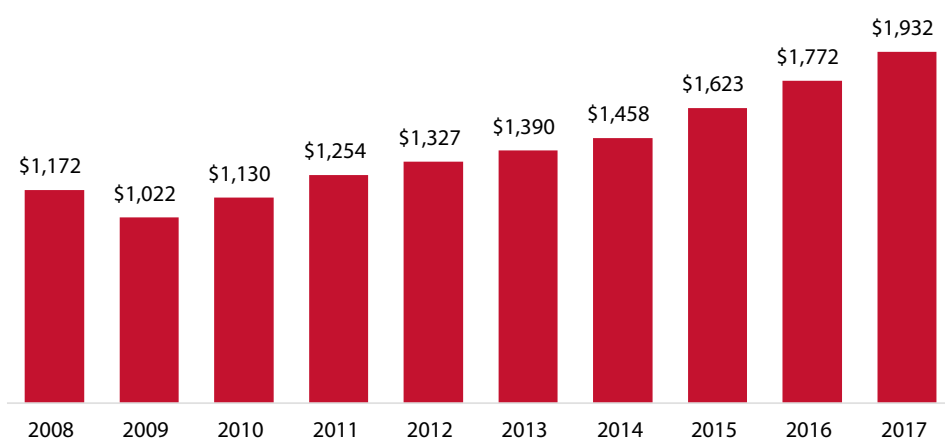
Source: STR, Inc. Republication or other pre-use of this data without the express written permission of STR is strictly prohibited.

## Statewide Occupancy Rates by Month



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

## Total Taxable Accommodations Sales (\$ millions of 2017 dollars)



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

| Statewide Indicators  | 2016      | 2017      | Change 2016-2017 |
|---|-----------|-----------|------------------|
| Utah Population   | 3,054,806 | 3,123,607 | 2.3%             |
| Employment, All Industries <sup>1</sup> (Private Sector)      | 1,187,620 | 1,224,812 | 3.1%             |
| Wages, All Industries <sup>2</sup> (Private Sector, Millions) | \$53,182  | \$56,449  | 6.1%             |

## Employment, Spending & Wages (Dollar Amounts Are Millions of Dollars)

|  |         |         |      |
|--|---------|---------|------|
| Estimated Traveler Spending                                      | \$8,535 | \$9,148 | 7.2% |
| Total Tourism-Related Employment <sup>3</sup>                    | 143,600 | 147,800 | 2.9% |
| Total Tourism-Related Wages <sup>4</sup>                         | \$4,749 | \$5,103 | 7.5% |
| Direct Leisure & Hospitality Employment (Private Sector)         | 138,626 | 143,027 | 3.2% |
| Direct Leisure & Hospitality Wages (Private Sector)              | \$2,584 | \$2,792 | 8.0% |
| Leisure & Hospitality Share of Total Employment (Private Sector) | 11.7%   | 11.7%   | 0.0% |
| Total Leisure & Hospitality Taxable Sales                        | \$7,196 | \$7,721 | 7.3% |

## Utah Accommodations Industry

|  |          |          |       |
|--|----------|----------|-------|
| Hotel/Motel Occupancy Rates <sup>5</sup>                 | 63.7%    | 65.4%    | 2.7%  |
| Hotel/Motel Average Daily Rate <sup>6</sup>              | \$116.50 | \$121.30 | 4.1%  |
| Hotel/Motel Revenue Per Available Room <sup>7</sup>      | \$74.22  | \$79.38  | 7.0%  |
| Accommodations Industry Employment (Private Sector)      | 19,937   | 20,555   | 3.1%  |
| Accommodations Industry Wages (Private Sector, Millions) | \$503    | \$529    | 5.2%  |
| Accommodations - Taxable Sales (Millions)                | \$1,732  | \$1,933  | 11.6% |

## Tourism-Related Tax Revenues (Dollar Amounts Are Millions of Dollars)

|   |        |        |       |
|---|--------|--------|-------|
| Total TRCC Tax Revenue                        | \$66.9 | \$71.0 | 6.1%  |
| Total TRT Tax Revenue (County & Municipality) | \$62.8 | \$71.3 | 13.5% |
| Total Motor Vehicle Rental Tax Revenue        | \$5.9  | \$6.3  | 6.8%  |
| Total Resort Communities Sales Tax            | \$22.2 | \$24.6 | 10.8% |

## Statewide Visitation Counts

|   |            |            |       |
|---|------------|------------|-------|
| Utah Skier Visits   | 4,584,658  | 4,145,321  | -9.6% |
| Total National Park Recreation Visits                     | 10,087,077 | 10,507,960 | 4.2%  |
| Arches National Park                                      | 1,585,718  | 1,539,028  | -2.9% |
| Bryce Canyon National Park                                | 2,365,110  | 2,571,684  | 8.7%  |
| Canyonlands National Park                                 | 776,218    | 742,271    | -4.4% |
| Capitol Reef National Park                                | 1,064,904  | 1,150,165  | 8.0%  |
| Zion National Park  | 4,295,127  | 4,504,812  | 4.9%  |
| Total National Place Recreation Visits <sup>8</sup>       | 5,752,498  | 7,016,010  | 22.0% |
| Total Utah State Park Recreation Visits                   | 5,321,308  | 6,350,166  | 19.3% |
| Salt Lake International Airport - Total Passengers        | 23,155,527 | 24,199,351 | 4.5%  |
| Utah Amtrak Passenger Rail - Total Ridership (Federal FY) | 51,379     | 49,625     | -3.4% |

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

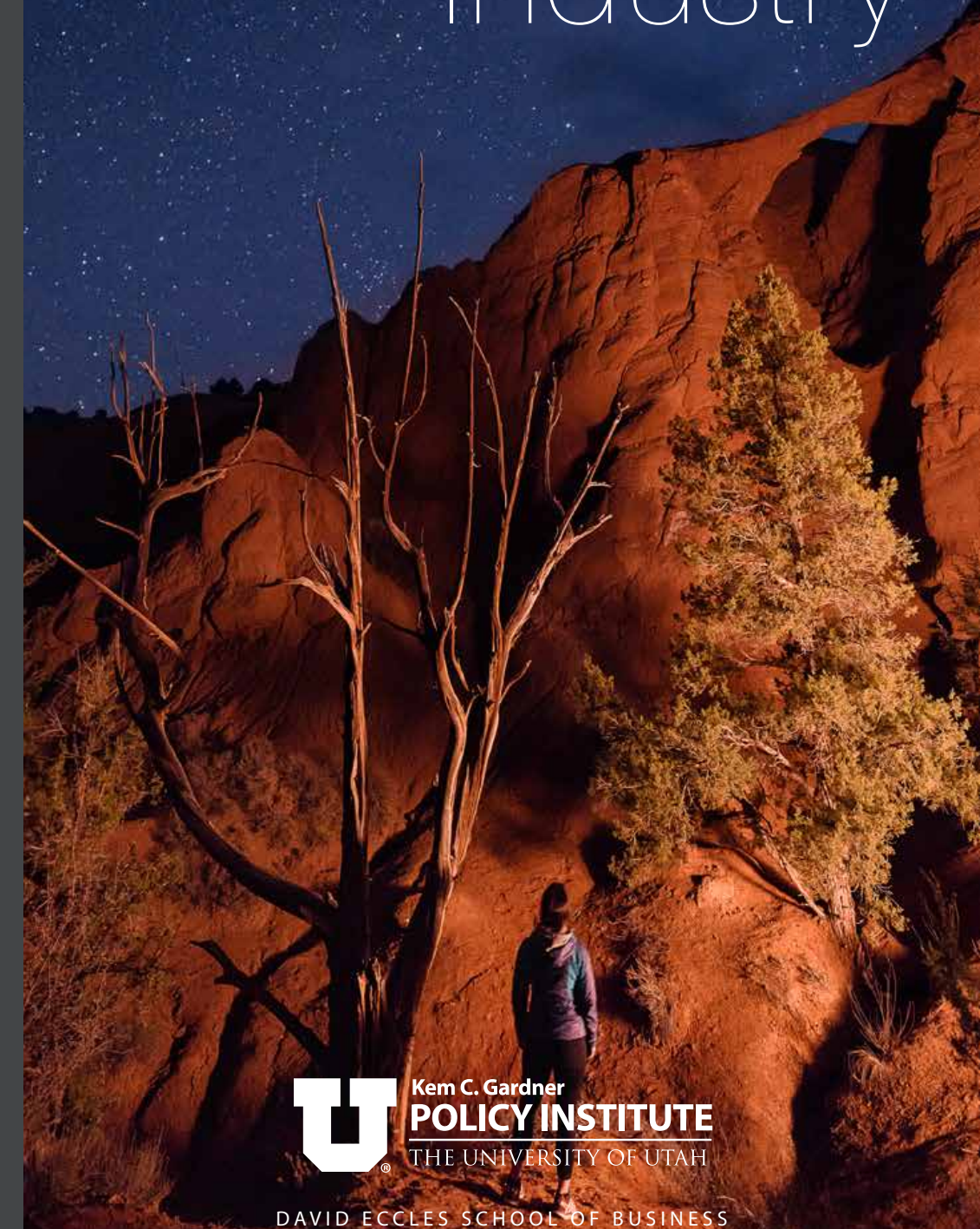
- 1 Employment includes annual average employee full- and part-time private jobs (does not include proprietors).
- 2 Wages includes annual average full- and part-time employee wages (does not include proprietors).
- 3, 4 Includes multipliers (e.g. indirect and induced effects).
- 5, 6, 7 Kem C. Gardner Policy Institute analysis of STR, Inc., data; REPUBLICATION OR OTHER PRE-USE OF THIS DATA WITHOUT THE EXPRESS WRITTEN PERMISSION OF STR IS STRICTLY PROHIBITED.
- 8 Visitation data for Flaming Gorge NRA and Bears Ears NM is not included.

## Kem C. Gardner Policy Institute

411 East South Temple | Salt Lake City, UT 84111 | [www.gardner.utah.edu](http://www.gardner.utah.edu)

DAVID ECCLES SCHOOL OF BUSINESS

# The State of Utah's 2018 Travel and Tourism Industry



**Kem C. Gardner**  
**POLICY INSTITUTE**  
THE UNIVERSITY OF UTAH

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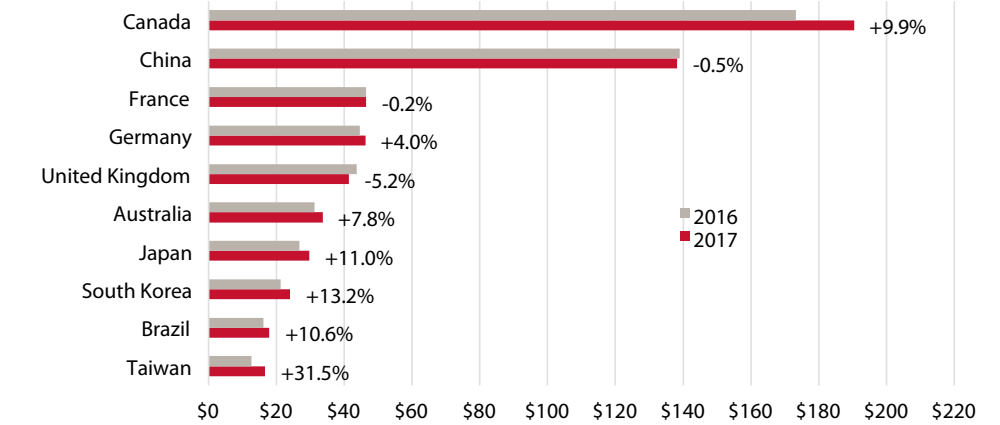
# Visitors and Spending

In 2017, tourists and travelers spent a record \$9.15 billion in Utah. Of that total spending, \$7.91 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 Colorado. Utah's largest international markets were Canada, China, and France. While Chinese visitor spending remained flat in 2017, there were increases in Utah spending by Asian visitors from Japan, South Korea, and Taiwan.

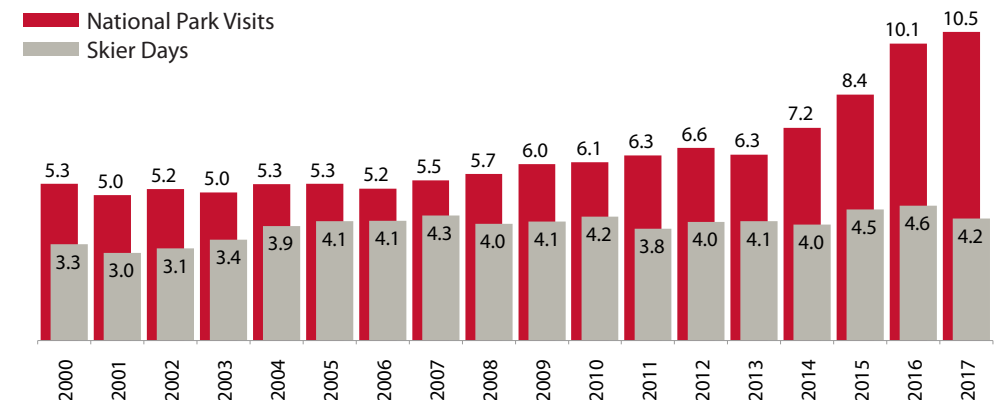
Despite lower-than-average snowfall, Utah's ski resorts reported 4.2 million skier days during the 2017-2018 ski season and Utah's five national parks experienced a record 10.5 million visits in 2017—a 4 percent annual increase.

## International Visitor Spending by Country (\$ millions and year-over-year change shown)



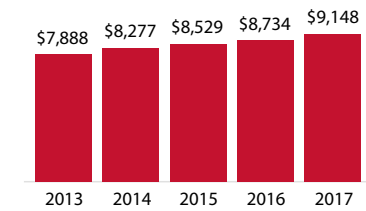
Source: Tourism Economics

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



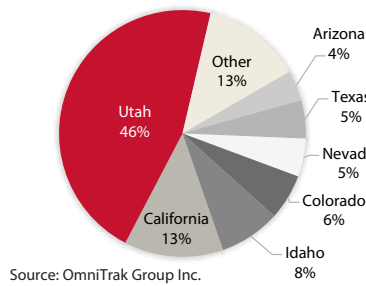
Note: Skier days include season that begins with year shown and goes through following year (e.g. 2017 = 2017-2018 ski season)  
Source: Ski Utah and the U.S. National Park Service

## Total Direct Visitor Spending (\$ millions of 2017 dollars)



Note: Includes resident, domestic nonresident and international visitor spending  
Source: U.S. Travel Association

## Share of Total Visitors by State, 2017



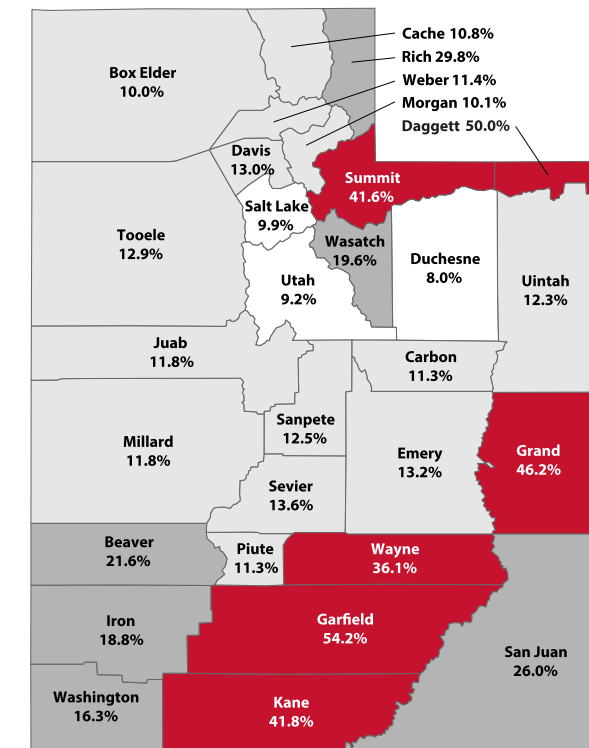
Source: OmniTrak Group Inc.

# Employment

Travel and tourism-related employment includes jobs in transportation, accommodations, restaurants, the arts, entertainment and recreation industries, and retail. In 2017, Utah reported approximately 87,400 direct travel and tourism jobs—a 3 percent increase over 2016—and travel and tourism ranked eighth as a major industry in Utah. Over the past five years, the largest annual percent increases in private travel and tourism employment were in the transit and ground passenger, recreational gear rental, and museums, parks, and historical sites sectors.

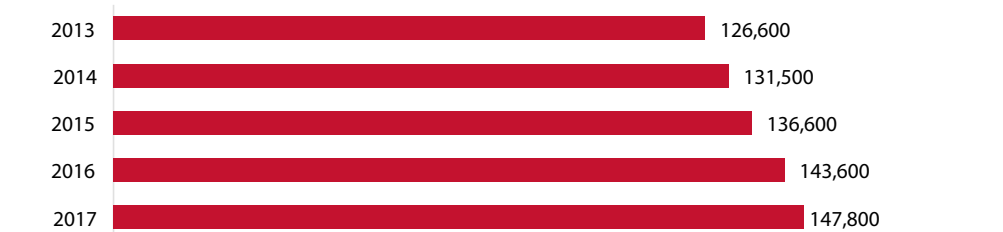
Around 65 percent of all travel and tourism jobs are part of the leisure and hospitality sector while the rest are categorized under a variety of other sectors, including retail trade, transportation, and information. In 2017, over a quarter of all private jobs in Garfield, Daggett, Grand, Kane, Summit, Wayne, Rich, and San Juan counties were in the leisure and hospitality sector. Over the past five years, the largest leisure and hospitality employment growth took place in San Juan, Utah, and Iron counties.

## Private Leisure and Hospitality Sector Jobs as a Percent of Total Private Employment, 2017



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

## Total Tourism-Generated Jobs



Note: Includes private and public jobs and economic multiplier effects.  
Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Economic Analysis, U.S. Bureau of Labor Statistics and Utah Department of Workforce Services data

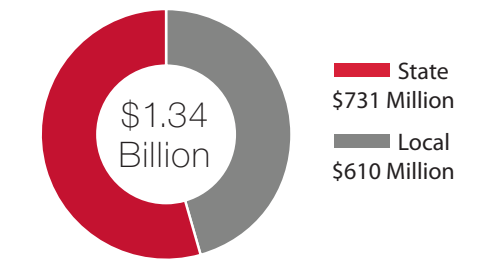
# Tax Revenue

The total economic activity supported by \$9.15 billion in direct visitor spending in 2017 generated a record \$1.34 billion in total state and local tax revenue.

Tourism-related state and local sales tax revenues 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. Total tourism-related sales tax revenue grew 7 percent between 2016 and 2017 and has grown 38 percent since 2013.

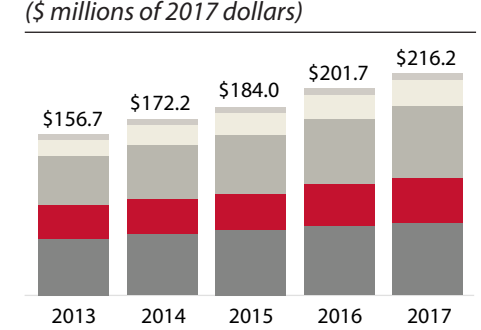
In 2017, the counties of Morgan, Daggett, Wayne, Kane, San Juan, and Wasatch had the greatest year-over-year percent increases in county transient room tax. Salt Lake County collected the most county transient room tax revenue (\$18.3 million), followed by Summit County (\$9.5 million) and Washington County (\$7.1 million).

## Total Tourism-Generated Tax Revenue, 2017



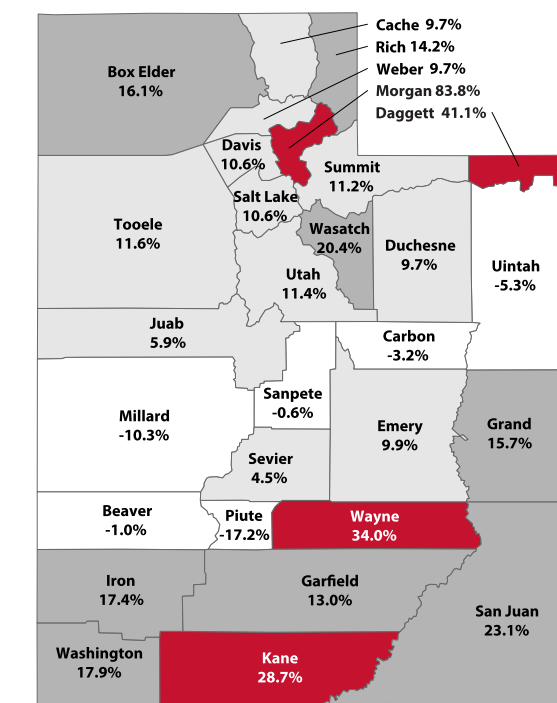
Note: Includes economic multiplier effects

## Tourism-Related Sales Tax Revenues, FY 2013-2017 (\$ millions of 2017 dollars)



Legend:  
 ■ Statewide Car Rental  
 ■ Resort Communities Sales  
 ■ Transient Room  
 ■ Zoo, Arts, Parks  
 ■ Tourism, Recreation, Cultural, and Convention

## Annual Percent Change in County Transient Room Tax Revenue, FY 2016-2017



## County Transient Room Tax Revenue, Top Ten Counties, FY 2017 (\$ millions)

|            |        |
|------------|--------|
| Salt Lake  | \$18.3 |
| Summit     | \$9.5  |
| Washington | \$7.1  |
| Grand      | \$4.7  |
| Utah       | \$3.4  |
| Kane       | \$2.5  |
| Garfield   | \$1.9  |
| Wasatch    | \$1.9  |
| Davis      | \$1.6  |
| Weber      | \$1.6  |

Source (all above figures): Kem C. Gardner Policy Institute analysis of Utah State Tax Commission data