

Accommodations

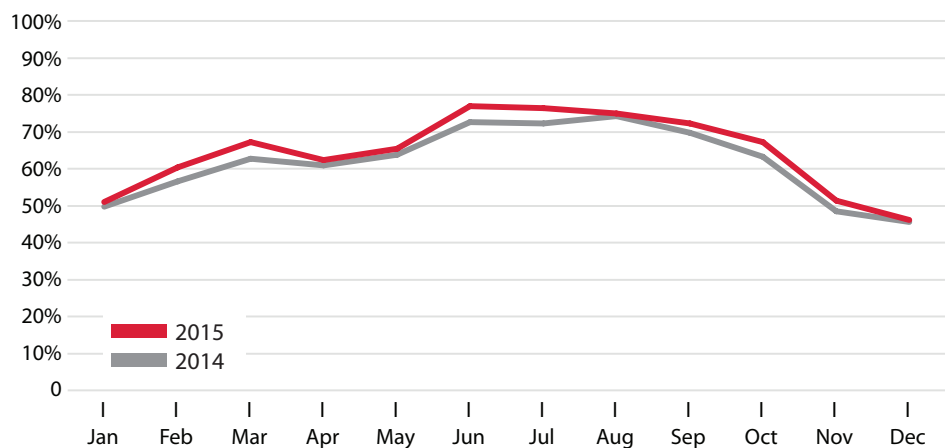
Taxable accommodation sales indicate trends in spending by travelers and tourists across the state. In 2014, \$1.4 billion was spent on accommodations in the state of Utah, a 66 percent increase from 2006. Accommodations include hotels, motels, bed and breakfasts, campgrounds, and similar businesses.

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

Average Daily Room Rates by Top Travel and Tourism Counties

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

Average Statewide Occupancy Rates by Month



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Total Taxable Accommodations Sales (millions)



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

2016

STATEWIDE INDICATORS	2013	2014	Change 2013-2014
Utah Population (U.S. Census Bureau)	2,900,872	2,942,902	1.4%

Employment, Spending & Wages (Dollar Amounts Are Millions of Constant 2014 Dollars)	2013	2014	Change 2013-2014
Estimated Traveler Spending	\$7,606	\$7,805	2.6%
Total Employment, All Industries ¹ (Private Sector)	1,064,440	1,097,554	3.1%
Total Wages, All Industries ² (Private Sector)	\$43,900	\$46,649	6.3%
Total Tourism-Related Employment	132,700	137,200	3.4%
Total Tourism-Related Wages	\$3,765	\$3,936	4.5%
Total Leisure & Hospitality Employment (Private Sector)	123,521	128,088	3.7%
Total Leisure & Hospitality Wages (Private Sector)	\$2,061	\$2,195	6.5%
Leisure & Hospitality Share of Total Private Employment	11.6%	11.7%	0.1%
Total Leisure & Hospitality Taxable Sales	\$5,649	\$6,035	6.8%

Utah Accommodations Industry (Dollar Amounts Are Constant 2014 Dollars)	2013	2014	Change 2013-2014
Hotel/Motel Occupancy Rates	58.5%	60.1%	1.6%
Hotel/Motel Average Daily Rate (ADR)	\$93.31	\$96.09	3.0%
Hotel/Motel Revenue Per Available Room (RevPAR)	\$54.61	\$57.64	5.5%
Accommodations Industry Employment (Private)	18,633	19,270	3.4%
Accommodations Industry Wages (Private, Millions)	\$418	\$446	6.6%
Accommodations - Taxable Sales (Millions)	\$1,341	\$1,406	4.9%

Tourism-Related Tax Revenues (Dollar Amounts Are Millions of Constant 2014 Dollars)	2013	2014	Change 2013-2014
Total Motor Vehicle Rental Tax Revenue	\$4.8	\$5.4	13.4%
Total Resort Communities Sales Tax	\$14.6	\$18.9	29.5%
Total TRCC Tax Revenue	\$53.8	\$58.3	8.4%
Total TRT Tax Revenue (County & Municipality)	\$46.8	\$51.0	8.9%

Statewide Visitation Counts	2013	2014	Change 2013-2014
Utah Skier Visits	4,161,585	3,946,762	-5.2%
Total National Park Recreation Visits	6,328,040	7,239,149	14.4%
Arches National Park	1,082,866	1,284,767	18.6%
Bryce Canyon National Park	1,311,875	1,435,741	9.4%
Canyonlands National Park	462,242	542,431	17.3%
Capitol Reef National Park	663,670	786,514	18.5%
Zion National Park	2,807,387	3,189,696	13.6%
Total National Place Recreation Visits ³	3,786,357	4,577,570	20.9%
Utah Welcome Center Visits ⁴	442,408	384,161	-13.2%
Salt Lake International Airport - Total Passengers	20,186,474	21,141,610	4.7%
Utah Amtrak Passenger Rail - Total Ridership	55,283	51,470	-6.9%

Sources: U.S. Census Bureau, TNS Global, U.S. Bureau of Labor Statistics, Smith Travel Research, Bureau of Land Management, Utah State Tax Commission, Ski Utah, National Park Service, Utah Office of Tourism, S.L.C. International Airport, Amtrak, Utah Department of Workforce Services, VisaVue® Travel

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. Visitation data for Flaming Gorge NRA is not included.
4. 2014 visitation data is not complete.

*All dollar figures in this document are adjusted for inflation and in 2014 dollars

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 AN INITIATIVE OF THE DAVID ECCLES SCHOOL OF BUSINESS

The State of Utah's Travel and Tourism Industry

Kem C. Gardner
POLICY INSTITUTE
 THE UNIVERSITY OF UTAH

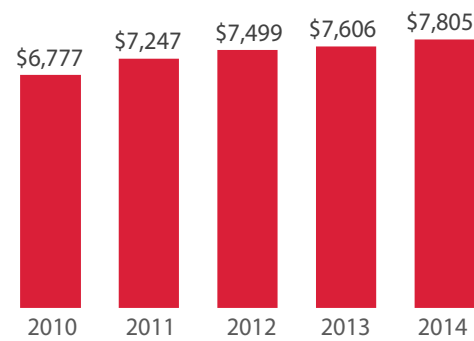
Visitors and Spending

In 2014, resident and nonresident tourists and travelers spent a record \$7.8 billion in Utah's economy. Of that \$7.8 billion, \$6.7 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, and dining out. 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 comes from western states. In 2014, Utah's largest international markets were Canada, China, and France.

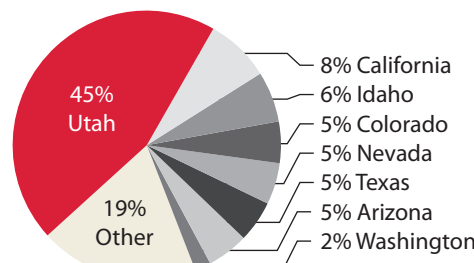
Total skier days have hovered around 4 million over the past ten years. Utah's "Mighty Five" national parks received a record 7.2 million recreation visits in 2014.

Total Direct Visitor Spending, (millions)



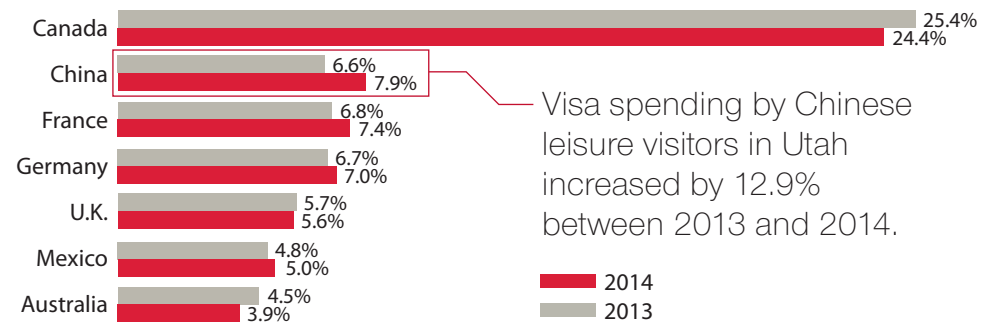
Source: Kem C. Gardner Policy Institute analysis of TNS Global data

Share of Total Visitors by State, 2014



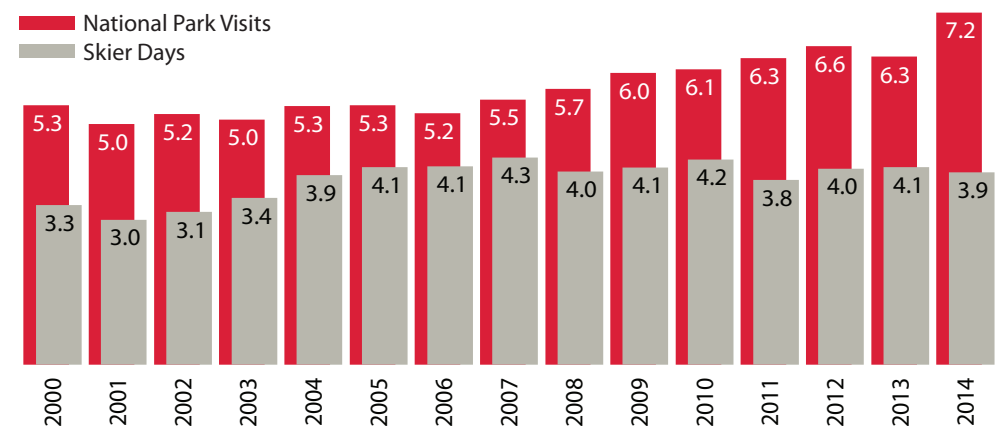
Source: TNS Global

Share of Estimated International Visitor Card Spending by Country



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 2013 and 2014.

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



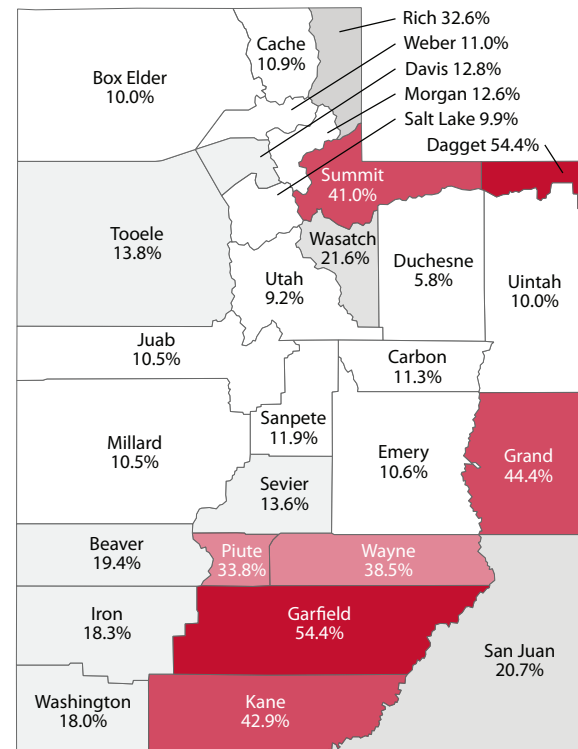
Sources: U.S. National Park Service and Ski Utah

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 2014, travel and tourism supported an estimated 73,600 direct jobs, and 137,200 total (direct, indirect and induced) jobs – a 3.4 percent increase over 2013. One out of every 10 Utah jobs can be attributed to travel and tourism.

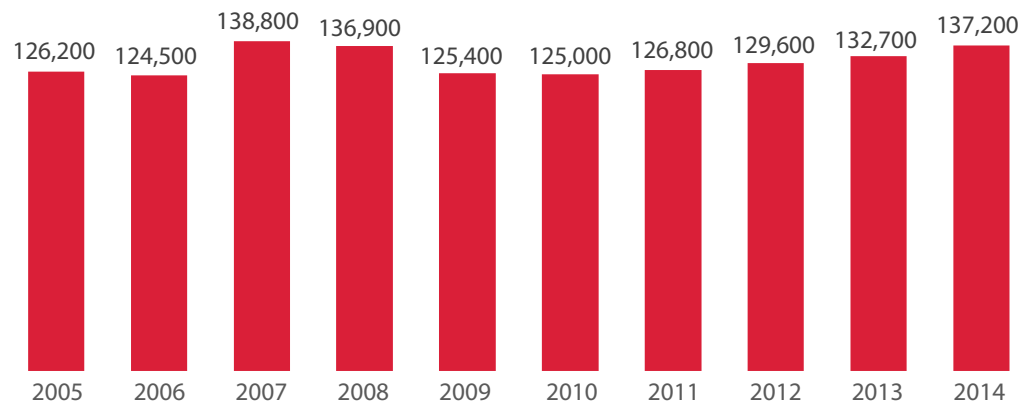
Although data are unavailable to estimate travel and tourism-related jobs on a county-by-county basis, it is possible to analyze total leisure and hospitality jobs as a share of total county jobs. In fact, around 65 percent of all travel and tourism-related jobs fall into the "leisure and hospitality" sector. In 2014, counties with the largest share of leisure and hospitality jobs were Daggett, Garfield, Grand, Kane, Summit, Wayne, and Piute. Washington County experienced the most growth in leisure and hospitality jobs between 2010 and 2014.

Leisure and Hospitality Sector Jobs as a Percent of Total Private Employment, 2014



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

Total Tourism-Generated Jobs



Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics data

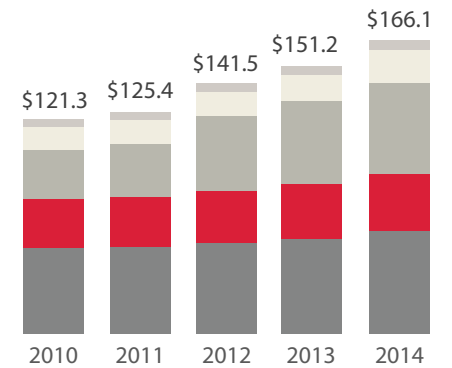
Tax Revenue

Direct visitor spending of \$7.8 billion in 2014 generated a record \$1.07 billion in estimated total tax revenue for Utah. Of the over \$1 billion in estimated direct, indirect, and induced tax revenue, \$611.1 million was state and \$461.5 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 sales 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 10 percent between 2013 and 2014 and has grown 37 percent since 2010.

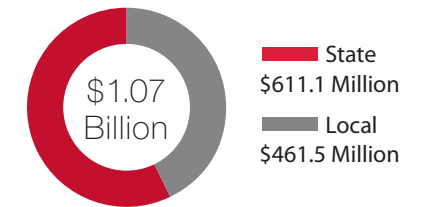
Utah counties with the largest shares of tourism-related sales tax revenue were rural counties, including Garfield, Grand, Kane, Daggett, Wayne and Rich. Rich County experienced the greatest tourism-related sales tax revenue growth between 2010 and 2014.

Total Tourism-Related Tax Revenue (millions)

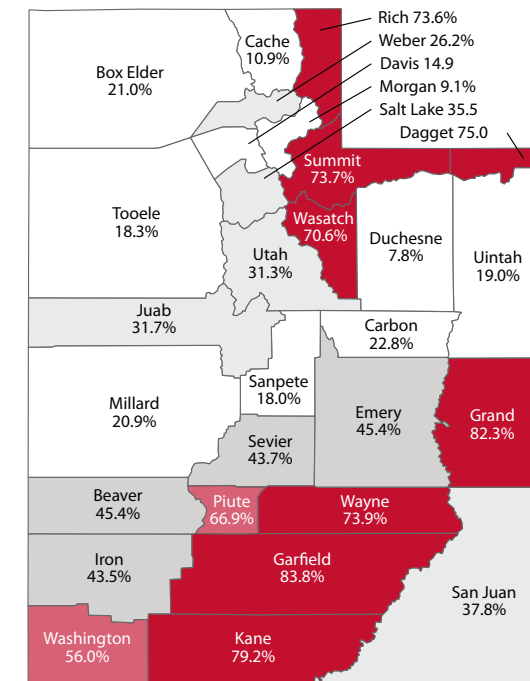


Legend for Total Tourism-Related Tax Revenue (millions):
 - Statewide Motor Vehicle Rental Tax
 - Resort Communities Sales Tax
 - Transient Room Tax
 - Zoo, Arts, Parks Tax
 - Tourism, Recreation, Cultural, and Convention Tax

Total Tourism-Generated Tax Revenue, 2014



Share of Sales Tax Revenue that is Tourism-Related, 2013



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

Growth in Tourism-Related Sales Tax Revenue, Top Ten Counties, 2010-2014

Rich	177.8%
Utah	140.8%
Duchesne	99.2%
Kane	69.0%
Morgan	66.7%
Uintah	62.9%
Grand	58.4%
Daggett	52.0%
Wasatch	48.5%
Davis	41.1%