

Taxable accommodation sales indicate trends in spending by travelers and tourists across the state. In 2018, Utah accommodation sales exceeded \$2.0 billion for the first time, a 3.2 percent year-over-year increase and a 38.5 percent increase from 2014. Accommodations include hotels, motels, bed and breakfasts, campgrounds, and similar businesses.<sup>2</sup>

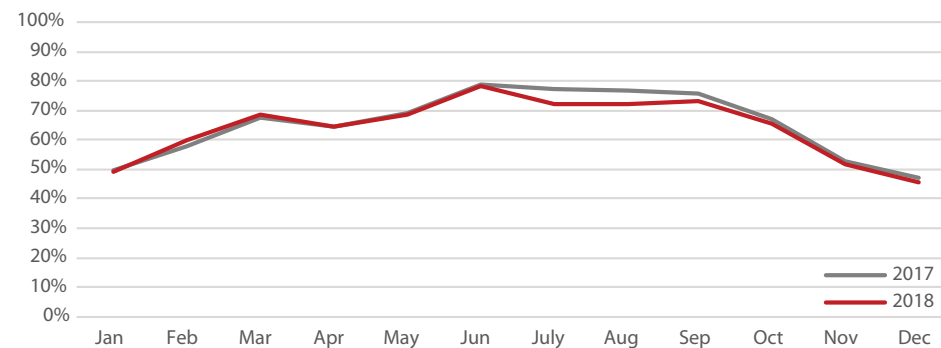
The average annual statewide occupancy rate in 2018 (64.1 percent) was slightly lower than in 2017 (65.3 percent); likewise, average daily room rates and revenue per available room on a statewide basis remained flat. Possible explanations for these temperate year-over-year numbers could be the result of more visitors staying in short-term rentals (vs. hotels) and/or a larger 2018 hotel room supply (vs. 2017). However, although year-over-year rates remained flat on a statewide basis, that was not necessarily the case on a countywide basis (see examples in table below).

### Percent Change in Average Daily Room Rates by Select Counties

County	2017	2018	% Change
Garfield-San Juan-Wayne	\$114.85	\$120.28	4.7%
Grand	\$148.13	\$152.79	3.1%
Kane	\$172.91	\$186.12	7.6%
Salt Lake	\$112.77	\$114.25	1.3%
Summit	\$250.33	\$256.18	2.3%
Washington	\$113.56	\$108.33	-4.6%

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### Statewide Occupancy Rates by Month, 2017 vs. 2018



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

### Taxable Accommodations Sales (millions of 2018 dollars)



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

Statewide Indicators	2017	2018	Change 2017-2018
Utah Population (Kem C. Gardner Policy Institute)	3,113,983	3,166,647	1.7%
Employment, All Industries <sup>3</sup> (Private Sector)	1,224,812	1,269,686	3.7%
Wages, All Industries <sup>4</sup> (Private Sector)	\$56,449	\$60,947	8.0%

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

Estimated Traveler Spending	\$9,148	\$9,745	6.5%
Total Tourism-Related Employment <sup>5</sup>	129,400	133,000	2.8%
Total Tourism-Related Wages <sup>6</sup>	\$4,634	\$4,812	3.8%
Direct Leisure & Hospitality Employment (Private Sector)	143,027	148,530	3.8%
Direct Leisure & Hospitality Wages (Private Sector)	\$2,792	\$2,989	7.1%
Leisure & Hospitality Share of Total Employment (Private Sector)	11.7%	11.6%	-0.7%
Total Leisure & Hospitality Taxable Sales	\$7,721	\$8,191	6.1%

### Utah Accommodations Industry

Hotel/Motel Occupancy Rates <sup>7</sup>	65.3%	64.1%	-1.8%
Hotel/Motel Average Daily Rate <sup>8</sup>	\$121.89	\$122.74	0.7%
Hotel/Motel Revenue Per Available Room <sup>9</sup>	\$79.30	\$78.55	-0.9%
Accommodations Industry Employment (Private)	20,555	21,142	2.9%
Accommodations Industry Wages (Private, Millions)	\$529	\$565	6.8%
Accommodations Taxable Sales (Millions)	\$1,933	\$2,039	5.5%

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

Total TRCC Tax Revenue	\$71.0	\$73.1	3.0%
Total TRT Tax Revenue (County & Municipality)	\$71.3	\$78.1	9.5%
Total Motor Vehicle Rental Tax Revenue	\$6.3	\$6.7	6.3%
Total Resort Communities Sales Tax	\$24.6	\$25.6	4.1%

### Statewide Visitation Counts

Utah Skier Visits	4,145,321	5,125,441	23.6%
Total National Park Recreation Visits	10,507,960	10,630,144	1.2%
Arches National Park	1,539,028	1,663,557	8.1%
Bryce Canyon National Park	2,571,684	2,679,478	4.2%
Canyonlands National Park	742,271	739,449	-0.4%
Capitol Reef National Park	1,150,165	1,227,627	6.7%
Zion National Park	4,504,812	4,320,033	-4.1%
Total National Place Recreation Visits <sup>10</sup>	7,207,373	6,762,377	-6.2%
Total Utah State Park Recreation Visits (FY)	5,673,484	6,675,981	17.7%
Salt Lake International Airport - Total Passengers	24,199,351	25,554,244	5.6%

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

### Endnotes:

- Based on \$9.75 billion in direct visitor spending plus \$6.19 billion in indirect and induced spending effects. State tax revenue includes sales, personal income, fuel, corporate income, and other taxes and fees; local tax revenues include sales, property, and other taxes.
- Does not include short-term rentals (e.g. Airbnb, HomeAway/VRBO, etc.).
- Employment includes annual average employee full- and part-time private jobs (does not include sole proprietors).
- Wages includes annual average full- and part-time employee wages (does not include sole proprietors).
6. Consists of direct, indirect, and induced jobs and wages.
- 7, 8, 9. Kem C. Gardner Policy Institute analysis of STR, Inc., data; REPUBLICATION OR OTHER RE-USE OF THIS DATA WITHOUT THE EXPRESS WRITTEN PERMISSION OF STR IS STRICTLY PROHIBITED.
10. Visitation data for Flaming Gorge NRA and Bears Ears NM are not included.

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# The State of Utah's Travel and Tourism Industry



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**POLICY INSTITUTE**  
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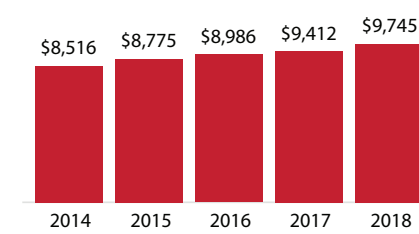
# Visitors and Spending

In 2018, travelers and tourists spent a record \$9.75 billion in Utah. Nonresident visitors spent \$8.38 billion of that total, with the largest shares spent on transportation (including gasoline purchases, car rentals, transportation fares, parking), lodging, 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 California, Nevada, and Idaho. Utah's largest international markets were Canada, China, and Germany. While Asian and Western European visitor spending declined in 2018, spending by visitors from Australia, Brazil, and Mexico increased.

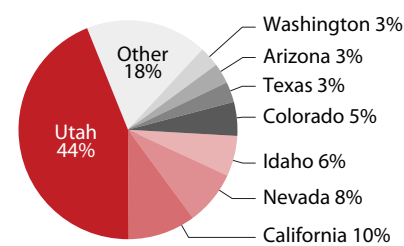
Utah's national parks, state parks, and ski resorts all reported record visitation in 2018 with 10.6 million national park visits, 6.7 million state park visits, and 5.1 million skier days.

## Direct Visitor Spending (millions of 2018 dollars)



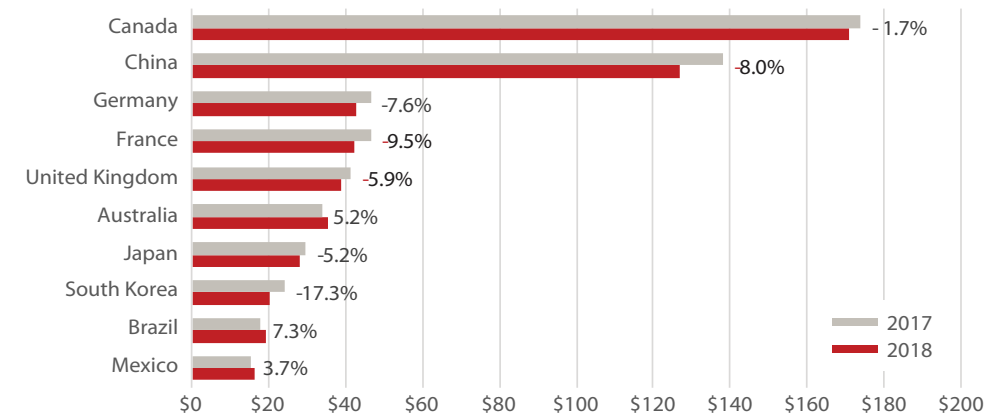
Note: Includes resident, domestic nonresident, and international visitor spending  
Source: U.S. Travel Association

## Share of Domestic Visitors by State, 2018



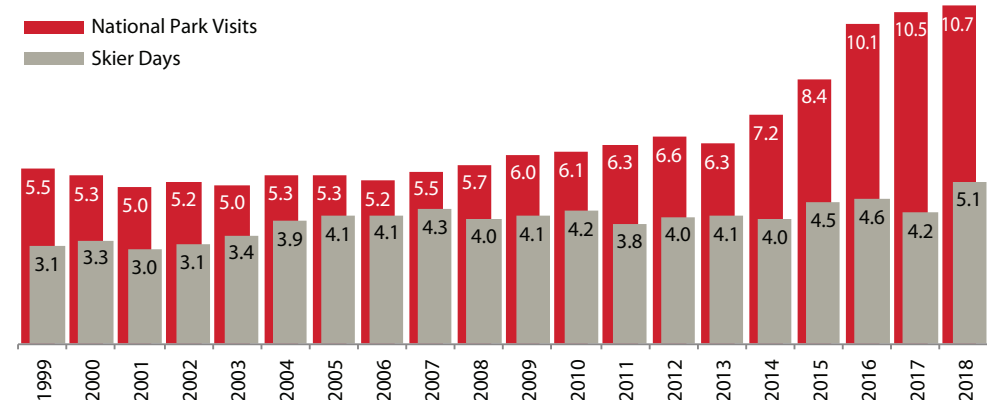
Source: Kem C. Gardner Policy Institute analysis of U.S. Travel Association data

## International Visitor Spending by Country, 2017 vs. 2018



Source: Tourism Economics

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



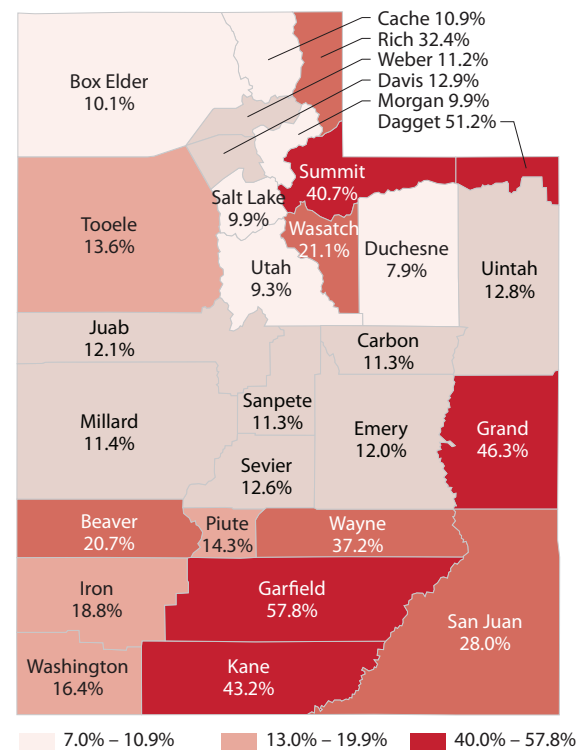
Note: Skier days include season that begins with year shown and goes through following year (e.g. 2017 = 2017-2018 ski season)  
Source: Ski Utah and the U.S. National Park Service

# Travel and Tourism-Related Employment

Travel and tourism-related employment includes jobs in accommodations, arts, entertainment, foodservice, leasing, real estate, recreation, retail, and transportation. In 2018, visitor spending supported 133,000 Utah jobs—a 2.8 percent increase over 2017. Based on these numbers, travel and tourism ranked eighth as a major industry in Utah. In 2018, the foodservice, accommodations, and transportation sectors added the most travel and tourism jobs.

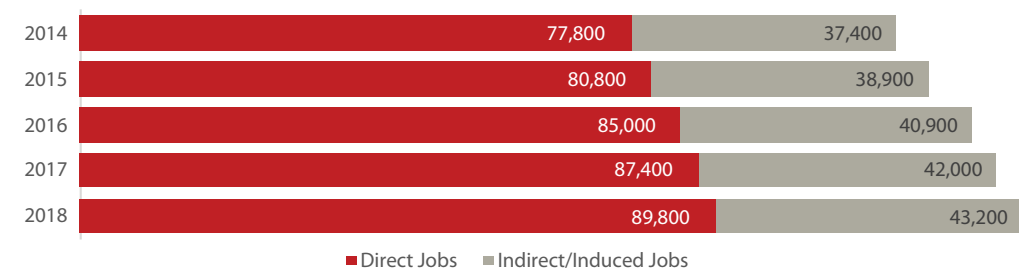
Around 65 percent of all travel and tourism jobs are part of the leisure and hospitality sector, which includes arts, entertainment, recreation, accommodations, and foodservice. In 2018, over a quarter of all private jobs in San Juan, Rich, Wayne, Summit, Kane, Grand, Daggett, and Garfield counties were in the leisure and hospitality sector.

## Private Leisure and Hospitality Sector Jobs as a Percent of Total Private Employment, 2018



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

## Travel and Tourism-Supported Jobs



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

## Growth in Private Leisure and Hospitality Employment, Top Ten Counties, 2014-2018

San Juan	43.9%
Rich	34.4%
Utah	27.3%
Wasatch	27.1%
Iron	26.3%
Juab	26.2%
Grand	24.0%
Box Elder	23.0%
Millard	20.8%
Garfield	17.3%

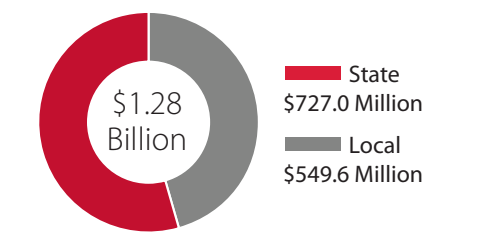
# Tax Revenue

Total economic activity associated with \$9.75 billion in direct visitor spending in 2018 generated \$1.28 billion in total state and local tax revenue.<sup>1</sup>

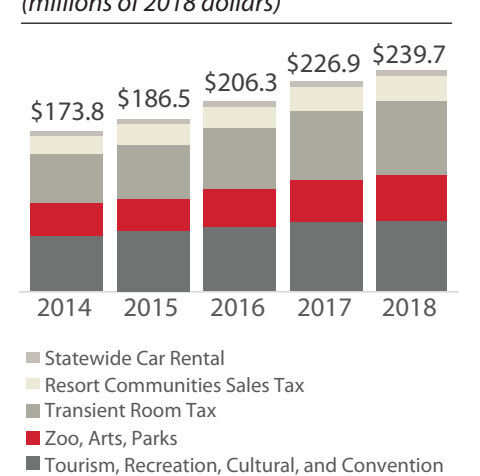
Tourism-related state and local sales tax revenues include Utah's Tourism, Recreation, Cultural, and Convention Tax (the combination of restaurant, motor vehicle leasing, and Salt Lake County room rental taxes); Transient Room Tax (both county and municipal); a statewide Motor Vehicle Rental Tax; the Zoo, Arts and Parks Tax; and Resort Communities Sales Tax. Total tourism-related sales tax revenue grew 5.6 percent between 2017 and 2018 and has increased 37.9 percent since 2014.

In 2018, the counties of Piute, Wasatch, Rich, Carbon, San Juan, Daggett, and Cache had the greatest year-over-year percent increases in county transient room tax receipts. Salt Lake County collected the most transient room tax revenues (\$20.4 million), followed by Summit County (\$9.9 million), and Washington County (\$8.6 million).

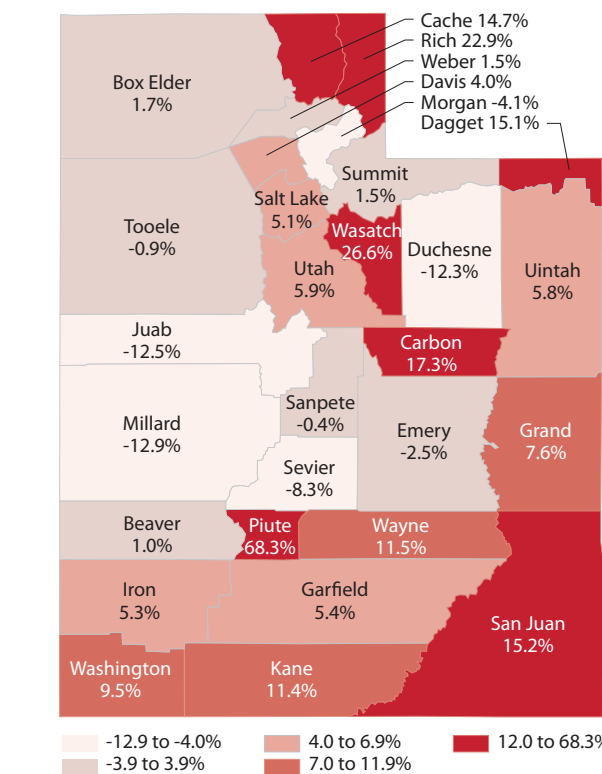
## Total Travel and Tourism-Generated Tax Revenue, 2018



## Select Tourism-Related Sales Tax Revenues (millions of 2018 dollars)



## Percent Change in Transient Room Tax Revenue by County, 2017-2018



## County Transient Room Tax Revenue (in \$ millions), Top Ten Counties, 2018

Salt Lake	\$20.4
Summit	\$9.9
Washington	\$8.6
Grand	\$5.4
Utah	\$3.8
Kane	\$3.0
Garfield	\$2.3
Wasatch	\$2.2
Davis	\$1.9
Weber	\$1.7

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