Washington County
Temporary Resident Population Estimates, 2023

Washington County’s blend of outdoor recreation opportunities and retirement communities contribute to a large number of temporary residents in addition to the permanent resident population.

May 2024
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Washington County Temporary Resident Population Estimates, 2023

Analysis in Brief

Washington County’s blend of outdoor recreation opportunities and retirement communities contribute to a large number of temporary residents. We estimate there were 64,235 temporary residents in Washington County on an average day in addition to the already estimated 198,533 permanent residents. This research offers an update to the initial 2017 temporary resident work.

- The 64,235 temporary residents equate to an additional third of the 198,533 permanent resident population. The two sum to estimate the 2023 total peak population of 262,768.

- This is an average daily count that varies daily and seasonally. We measure overnight visitors and seasonal residents in Washington County on an average day, but the number may be higher in the fall and lower in the winter.

- The temporary resident population is comprised of two distinct populations: overnight visitors and seasonal residents. Overnight visitors stay in commercial or private accommodations, and seasonal residents stay in secondary homes.

- We identified seasonal patterns in the overnight visitor population in addition to the average. We estimate 33,565 overnight visitors during the peak season in the fall, and 17,576 during the low season in the winter, with a maximum capacity of approximately 51,429 overnight visitors.

- Washington County has a large share of secondary homes, approximately 20 percent of the county’s total housing units. We translate those secondary housing units into people, and estimate 38,664 seasonal residents in 2023.

Temporary Resident Population by Type in Washington County, 2023

<table>
<thead>
<tr>
<th>Temporary Resident Population Type</th>
<th>Average Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Seasonal Residents</td>
<td>38,664</td>
</tr>
<tr>
<td>Total Overnight Visitors</td>
<td>25,571</td>
</tr>
<tr>
<td>Hotel</td>
<td>13,548</td>
</tr>
<tr>
<td>Bed and Breakfast</td>
<td>808</td>
</tr>
<tr>
<td>Private Home</td>
<td>7,357</td>
</tr>
<tr>
<td>Campground/RV Site</td>
<td>3,858</td>
</tr>
<tr>
<td>2023 Total Temporary Resident Population</td>
<td>64,235</td>
</tr>
</tbody>
</table>

Sources: Utah Population Committee; Kem C. Gardner Policy Institute analysis of STR, Inc., Omnisrait, Lighthouse, Washington County Assessor, and Census Bureau data.

Total Average Population Estimates by Resident Type in Washington County, 2023

<table>
<thead>
<tr>
<th>Temporary Residents</th>
<th>Permanent Residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>64,235</td>
<td>198,533</td>
</tr>
<tr>
<td>Total</td>
<td>262,768</td>
</tr>
</tbody>
</table>

2023 Total Average Population

Sources: Utah Population Committee; Kem C. Gardner Policy Institute analysis of STR, Inc., Omnisrait, Lighthouse, Washington County Assessor, and Census Bureau data.

How Should we Interpret These Numbers?

Washington County has an estimated 64,235 overnight visitors and seasonal residents on an average day. In reality, this estimate can vary daily and seasonally. This is distinct from and in addition to the UPC permanent resident population estimate of 198,533—the two sum to estimate the 2023 total average population of 262,768.
Overview

At the 2023 seasonal peak, new estimates indicate 64,235 seasonal residents and overnight visitors in Washington County, Utah. The county’s blend of outdoor recreation opportunities and retirement communities contribute to many seasonal residents and overnight visitors. This estimate equates to an additional 32% of the 198,533 permanent residents, resulting in 262,768 average permanent and temporary residents during the year. The Gardner Institute utilized multiple local data sources to estimate the seasonal residents and temporary visitors and performed a supplemental analysis of short-term rental data (such as Airbnb, HomeAway, and VRBO).

An accurate estimate of this population is vital information for infrastructure and service planning because these temporary residents utilize resources that typically are based around full-time resident populations. Traditional population estimates, such as those produced by the Census Bureau and the Utah Population Committee (UPC), measure the permanent residents who live in Washington County for most of the year. These official estimates do not include temporary or seasonal residents. This research updates previous temporary resident estimates with new and updated data and methodologies.

How Many Temporary Residents Are in Washington County on the Average Day?

An estimated 64,235 temporary residents were in Washington County on an average day in 2023. A temporary resident is any visitor or seasonal resident who stays at least one night in Washington County.

In 2023, the Utah Population Committee (UPC) estimated 198,533 permanent residents in Washington County. Figure 1 shows the two estimates (permanent and temporary residents). Adding the permanent and temporary resident populations resulted in a total peak Washington County population estimate of 262,768. Past research estimated that Washington County accommodated an extra 26% above the residential population estimates in 2017, but updated results indicate that number is now closer to 32%.

Why Are These Estimates Important?

This work creates a data-driven analysis to answer the question: How many people reside in Washington County on an average day? These average temporary visitor population estimates provide an important foundation for understanding the Washington County population. This research and these estimates offer a much more comprehensive view and definition of population that may be more helpful for planning purposes in a high-tourism area such as Washington County.

Table 1: Temporary Resident Population by Type in Washington County, 2023

<table>
<thead>
<tr>
<th>Temporary Resident Population Type</th>
<th>Average Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Seasonal Residents</td>
<td>38,664</td>
</tr>
<tr>
<td>Total Overnight Visitors</td>
<td>25,571</td>
</tr>
<tr>
<td>Hotel</td>
<td>13,548</td>
</tr>
<tr>
<td>Bed and Breakfast</td>
<td>808</td>
</tr>
<tr>
<td>Private Home</td>
<td>7,357</td>
</tr>
<tr>
<td>Campground/RV Site</td>
<td>3,858</td>
</tr>
<tr>
<td><strong>2023 Total Temporary Resident Population</strong></td>
<td><strong>64,235</strong></td>
</tr>
</tbody>
</table>


Figure 1: Total Average Population Estimates by Resident Type in Washington County, 2023

<table>
<thead>
<tr>
<th>Temporary Residents</th>
<th>Permanent Residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>64,235</td>
<td>198,533</td>
</tr>
<tr>
<td>262,768</td>
<td>2023 Total Average Population</td>
</tr>
</tbody>
</table>


Determining Temporary Resident Population

The temporary resident population is the sum of two distinct groups: overnight visitors and seasonal residents. Overnight visitors utilize varying paid and free accommodations such as hotels, motels, bed and breakfasts, resorts, campgrounds, and RV parks. The Gardner Institute utilized overnight stay accommodation data and applied occupancy rates and average travel party size by each accommodation type to estimate this population. Seasonal residents stay longer than the typical overnight visitor, usually in their second homes or timeshares for a few months at a time. The Gardner Institute estimated the seasonal population by applying the 2020 Census household occupancy rates and household size data to Washington County Assessor data records marked as non-primary homes. Figure 1 shows the 2023 population estimates by type.

The Seasonal Resident Population

In 2023, there were an estimated 38,664 seasonal residents, accounting for an additional 20% of Washington County’s 2023 resident population.

At the end of 2023, approximately 21% of the total housing units in Washington County Assessor Data were designated as “Non-Primary” or secondary homes. The Census Bureau defines these non-primary homes as vacant if they are occupied by individuals who live somewhere else for more than six months.
months of the year. This assumption is correct for estimating the permanent resident population but is problematic when estimating the total number of people residing in the county on a nightly basis, regardless of residency.

This analysis estimated the seasonal population by applying 2020 Census household occupancy rates and household size to all non-primary residential parcels in Washington County. These calculations were made at the census tract level to account for geographic rate variation across the county. They were then summed to provide a total county estimate (see Appendix A for Washington County census tract boundaries). Tables 2 and 3 show the number of non-primary housing units and the resulting seasonal population for 2020 and 2023.

Washington County added 2,258 new non-primary housing units to their records since the end of 2020, totaling 17,239 non-primary units at the end of 2023. Those housing units are translated into people using an 84% peak seasonal occupancy rate, resulting in an estimated 38,664 seasonal residents in 2023. This accounts for an additional 20% of Washington County’s 2023 resident population.

This peak seasonal analysis assumes occupancy patterns are the same for both seasonal and permanent residents, though the expectation is that, in reality, overnight visitors have slightly lower and less consistent occupancy trends than permanent residents.

This analysis also estimated maximum capacity of these secondary homes by assuming 100% occupancy. Figure 2 compares seasonal peak population estimates and seasonal home maximum capacity. These data show that if all the seasonal units were occupied in 2023, there would be approximately 49,026 seasonal residents rather than the peak estimate of approximately 38,664.

Table 2: Non-Primary Housing Units in Washington County, 2020-2023

<table>
<thead>
<tr>
<th>Total Units 2020</th>
<th>New Units 2021-2023</th>
<th>Total Units 2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>14,981</td>
<td>2,258</td>
<td>17,239</td>
</tr>
</tbody>
</table>

Source: Kem C. Gardner Policy Institute analysis of Washington County Assessor data

Table 3: Seasonal Resident Population Estimates for Washington County, 2020 and 2023

<table>
<thead>
<tr>
<th>Total Population 2020</th>
<th>New Population 2021-2023</th>
<th>Total Population 2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>33,374</td>
<td>5,290</td>
<td>38,664</td>
</tr>
</tbody>
</table>

Sources: Kem C. Gardner Policy Institute analysis of Washington County Assessor data and Census Bureau data

Figure 2: Seasonal Resident Population Estimates by Peak and Maximum Occupancy Rates, 2020 and 2023

The Overnight Visitor Population

The 25,600 average overnight visitors account for an additional 12% of Washington County’s 2023 residential population.

Average, low, and high-season overnight visitors are estimated, along with the maximum capacity of most of the accommodation types. Table 1 and Figure 3 display our estimates. On average, an estimated 25,600 overnight visitors stayed in Washington County, with 33,600 overnight visitors during the peak season in the fall and approximately 17,600 during the low season in the winter, with a maximum capacity of approximately 51,400 overnight visitors.

Overnight visitors stay in a variety of commercial, private, and/or free accommodations. Commercial paid accommodations could include hotels, bed and breakfasts, short term rentals, resorts, RV parks, and campgrounds. Free or not commercially taxed accommodations could include second homes (e.g.,
Table 4: Overnight Visitor Estimates for Washington County, 2023

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>Overnight Visitors (Low Season)</th>
<th>Average Overnight Visitors</th>
<th>Overnight Visitors (High Season)</th>
<th>Max Capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>17,576</td>
<td>25,571</td>
<td>33,565</td>
<td>51,429</td>
</tr>
<tr>
<td>Hotel</td>
<td>9,312</td>
<td>13,548</td>
<td>17,784</td>
<td>26,872</td>
</tr>
<tr>
<td>Bed &amp; Breakfast</td>
<td>555</td>
<td>808</td>
<td>1,060</td>
<td>1,514</td>
</tr>
<tr>
<td>Private Home</td>
<td>5,057</td>
<td>7,357</td>
<td>9,657</td>
<td>12,493</td>
</tr>
<tr>
<td>RV/Tent</td>
<td>2,652</td>
<td>3,838</td>
<td>5,064</td>
<td>10,550</td>
</tr>
</tbody>
</table>

Note: Hotel estimates do not include three hotels with a total of 315 rooms currently under construction.
Sources: Kem C. Gardner Policy Institute analysis of STR, Inc. and Omnitrak data

Figure 4: Monthly Peak Occupancy and Maximum Capacity for Washington County Hotels and Bed & Breakfasts (B&Bs), 2023

Seasonal Trends by Overnight Visitor Accommodation
Washington County visitation peaks in the fall and is lowest in the winter. This research identified these seasonal patterns in the occupancy rates across different types of overnight accommodations.

The largest share of Washington County overnight visitors stay in hotels and bed and breakfasts. Figure 4 shows a distinct seasonality, with the highest occupancy reported in September and October, and the lowest in December and January.

What is Driving Washington County’s Temporary Resident Population?
Washington County’s seasonal population and overnight visitor growth trends are intertwined with the robust regional resident population and economic expansion that began in the late 1960s. Washington County is the 5th most populous county in the state, growing from 13,900 in 1970 to 198,533 in 2023, with an absolute growth of 184,633 residents and a greater than thirteenfold increase. The Census Bureau recognized the St. George Metropolitan Statistical Area (Washington County) as the fastest-growing MSA in the nation in 2021 and 7th fastest growing in 2022.

The county’s proximity to I-15 between Salt Lake City and Las Vegas, regional economic growth and development, and the county’s unique recreational opportunities—including Zion National Park and four state parks—have all combined to strengthen its renown within the western United States as both a place to live and visit. Washington County has developed an economic structure that serves resident and visiting populations with industry concentrations in residential construction, services, retail trade, leisure and hospitality, and healthcare and medical service industries.

Migration has become a dependable mainstay of Washington County population growth, contributing over 80% of the county’s population increase since 2010. Over the last half-century, Washington County has gone from net out-migration across all age groups to net in-migration of virtually every age group.

houses, timeshares, and condominiums) and family or friends’ private residences. These estimates exclude overnight visitors who stay in short term rentals (e.g., Airbnb), camp on BLM land, sleep in cars, or day visitors.

This research indicates that there remains significant capacity within the existing overnight accommodations to support more overnight visitors. Overnight visitors are estimated based on monthly or quarterly trends, which do not identify actual daily peaks or variations.

Note: maximum capacity is estimated using four guests to one hotel room and two guests to one B&B room.
Sources: Kem C. Gardner Policy Institute analysis of Omnitrak and STR, Inc., data
Short Term Rental Supplemental Analysis

This analysis is separate from and not included in the temporary visitor population estimates. This data on short term rentals, while an important type of overnight accommodation, was intentionally left out of the official estimates due to potential overlap. An unknown number of these rentals are potentially non-primary homes used in the seasonal resident estimates or are primary homes included in the UPC primary residential estimates. There is insufficient data to understand these estimates’ potential overlap, so they are kept separate.

Based on Lighthouse short term rental data, there were an average of 4,335 unique short term rental listings in Washington County in 2023, a 15.0% year-over increase. Total short term rental listings grew 83% from 2019 to 2023, while total hotel rooms increased 10%. It is also notable that average annual hotel occupancy grew from 62.0% in 2019 to 64.4% in 2023, despite capacity growth, while short term rental occupancy decreased from 50.5% to 48.6% during the same time frame. These patterns indicate that visitors are more likely to stay in traditional overnight accommodations like hotels than home-sharing accommodations.

Short term rentals include a variety of accommodations that have been growing in number and popularity in Washington County. Each month, analytics firm Lighthouse (formerly Transparent) scrapes short term rental data from a variety of platforms, including Airbnb, VRBO, HomeAway, TripAdvisor, and Booking.

Short term rental occupancy patterns are similar to the hotel and bed and breakfast data. Peak occupancy occurs in April and October, and the lowest in January and February. The real story is found when occupancy is compared to maximum capacity. The Lighthouse data shows extremely low occupancy compared to rental capacities listed by property owners. For example, in October, there was room for approximately 43,000 visitors, but only 8,500 stayed in a short-term rental. That equates to roughly 20% occupancy during peak season. Figure 6 shows the monthly occupancy and total capacity data.

For more detail on short term rental geographic concentrations within Washington County see Appendix C and D.

Figure 5: Washington County Short Term Rental Monthly Listing Data, 2018-2023

Figure 6: Washington County Overnight Short Term Rental Guests vs. Maximum Short Term Rental Capacity, 2023

Note: Includes all short term rental listing types, except for “shared room;” includes all listing subtypes except for “bed & breakfast,” “dorm,” and “RV;” listings have been averaged by quarter and de-duplicated.

Source: Kem C. Gardner Policy Institute analysis of Lighthouse data

Note: Includes all short term rental listing types, except for “shared room;” includes all listing subtypes except for “bed & breakfast,” “dorm,” and “RV;” “100% Occupancy” represents every available listing booked with 3.36 visitors per listing and “100% Capacity” represents every available listing booked and every available bed filled. In cases where the listing capacity was left blank, the average travel party size of 3.36 visitors was used.

While the average short term rental listing capacity is 9.8 people, average overnight visitors and 100% occupancy estimates were calculated using the average travel party size in Washington County of 3.36 visitors per listing.

Source: Kem C. Gardner Policy Institute analysis of Lighthouse and Omnitrak data
Methodology

We created two distinct methodologies for the temporary resident estimates, one for overnight visitors and one for seasonal residents. Each method uses different data and assumptions. The following sections provide detailed information on the data, methods, and assumptions.

Seasonal Resident Population Estimate Data and Methods

We used the Housing Unit Method (HUM) of population estimation to estimate the seasonal resident population for Washington County. The method takes residential non-primary units from Washington County parcel data, then multiplies them by tract-level occupancy rates and a county-level average household size to estimate the seasonal resident population. Existing data sources do not allow for an estimate of when or how many nights these residents stay in the county.

Data Sources

Washington County Assessor’s Data

The Washington County Assessor’s office delivered a table of detailed parcel data, which served as the primary data source for housing units in Washington County. These data were filtered to residential non-primary housing units using the ABSTRACTCODE variable (a classification of parcel type). These residential non-primary codes include 12A (Residential – Non-Primary), 12B (Planned Unit Dev – Non-Primary), 12C (Mobile Home – Non-Primary), 12D (Mixed Use Res – Non-Primary), and 12E (Other Residential – Including Multi-Family Non-Primary). The parcel data were filtered further using the BLTASCODE variable to exclude detached garages, storage garages, sheds, barns, and several other non-residential structures. This filtering resulted in a total of 17,413 residential non-primary parcels, though 565 of these parcels have 0 units associated with them.

Utah Geospatial Resource Center Parcel Data

This tabular parcel data was then joined with a shapefile of Washington County parcels retrieved from the Utah Geospatial Resource Center. A total of 89 parcels with a total of 88 units failed to join the spatial file because there was no corresponding parcel ID. However, these parcels were eventually included in the analysis.

Assumptions Used for Estimation

Timing

The year built in the assessor data (field name BLTASYEARBUILT) is the actual time the structure was completed. We assume that people occupy the structure immediately. The data do not contain a field with the month each unit is completed. As a result, estimates are made for December 31 of the given year. Growth is calculated by taking all units completed in a calendar year.

Occupancy Rates

The housing unit method assumes vacancies in some non-primary residential units. Detailed data on the vacancy rate of these non-primary residential units does not exist, so the overall rate of housing unit occupancy from the 2020 Census is used as a substitute for this occupancy rate. The overall occupancy rate is the number of housing units occupied by primary residents divided by the total housing units.

In the 2020 Census data, the source occupancy rates in this analysis, the total housing units include all occupied or vacant housing units. Occupied units are those occupied as primary residences. Vacant housing units include those usually occupied by or available as primary residences and those that are seasonal or other non-primary residences (whether occupied or not). In other words, a housing unit is considered vacant in census terminology if it is not occupied or is occupied but not by a primary resident.

This occupancy rate assumption means that non-primary residential units are assumed to have the same rates of use (occupancy) as the rate of primary residences in the overall pool of housing structures. Importantly, it is assumed that occupancy rates vary by location, so nonresident structures in a given census tract will follow the 2020 Census vacancy rate specific to that tract. Tract level occupancy rates range from 42.7% to 95.2% and average 83.7% at the county level.

Average Household Sizes (Persons Per Household)

The method assumes that permanent and seasonal residents’ average household size is the same. Average household size is applied at the county level and was equal to 2.84 in Washington County in 2020.

Parcels with Special Treatment

The 89 non-primary residential parcels that failed to join the shapefile cannot be tied to a specific tract. Consequently, these parcels received special treatment in the modeling. A county-level rate was applied rather than using tract-level occupancy rates for these parcels.
Table 5: Washington County Non-Primary Total Housing Units, Occupied Housing Units, and Seasonal Residents

<table>
<thead>
<tr>
<th>Non-Primary Housing Units</th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Seasonal Residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Units built through 2019</td>
<td>14,228</td>
<td>11,128</td>
<td>31,648</td>
</tr>
<tr>
<td>Units built 2020 through 2023</td>
<td>3,011</td>
<td>2,467</td>
<td>7,015</td>
</tr>
<tr>
<td>Units built through 2023</td>
<td>17,239</td>
<td>13,595</td>
<td>38,664</td>
</tr>
</tbody>
</table>

Sources: Kem C. Gardner Policy Institute analysis of Washington County Assessor data and Census Bureau data

Figure 7: Washington County Overnight Visitor Accommodation Type Shares, 2023

45.3% Hotel
14.5% Shared Economy*
2.7% Bed & Breakfast
12.9% RV/Tent
24.6% Private Home (With Friends/Family)

*Note: Shared Economy is not included in Overnight Visitor estimates due to overlap with temporary resident analysis. Source: Kem C. Gardner Policy Institute analysis of Omnitrak data

Overnight Visitor Population Estimate Data and Methods

We estimate the overnight visitor population and establish peak visitor periods based on Smith Travel Research (STR) hotel occupancy data, Lighthouse short term rental occupancy data, and Omnitrak traveler survey data, which captures travel party size, length of stay, and accommodation type.

Methods

Omnitrak’s travel survey data was used to estimate the number of low-season and high-season visitors in all accommodation types to determine the percentage of Washington County overnight visitors that stayed in hotels (45.3%). Taking the low average overnight visitors in January (9,312) and the high average overnight visitors in October (17,783), we calculated a low of 20,556 nightly visitors in January and a high of 39,257 nightly visitors in October by dividing nightly hotel visitors by the reported hotel accommodation stay share (45.3%). Using Omnitrak’s travel survey responses regarding respondents’ overnight accommodations in Washington County, we estimated nightly visitors by all accommodation options listed on the traveler survey (see Figure 7).

Table 6: Washington County Visitor Estimates by Accommodation Type, 2023

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>Low (Jan)</th>
<th>Average</th>
<th>High (Oct)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>17,576</td>
<td>25,571</td>
<td>33,565</td>
</tr>
<tr>
<td>Hotel</td>
<td>9,312</td>
<td>13,548</td>
<td>17,784</td>
</tr>
<tr>
<td>Bed &amp; Breakfast*</td>
<td>555</td>
<td>808</td>
<td>1,060</td>
</tr>
<tr>
<td>Private Home**</td>
<td>5,057</td>
<td>7,357</td>
<td>9,657</td>
</tr>
<tr>
<td>RV/Tent**</td>
<td>2,652</td>
<td>3,858</td>
<td>5,064</td>
</tr>
</tbody>
</table>

Note: Shared Economy category is not included in the overnight population estimate. Source: Kem C. Gardner Policy Institute analysis of Omnitrak and STR, Inc., data

Table 7: Washington County Hotel Visitor Estimates, 2023

<table>
<thead>
<tr>
<th>Month (2023)</th>
<th>STR Occupancy Rate</th>
<th>Hotel Rooms</th>
<th>Occupied Rooms</th>
<th>Persons Per Room</th>
<th>Average Overnight Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
<td>42.1%</td>
<td>6,583</td>
<td>2,771</td>
<td>3.36</td>
<td>9,312</td>
</tr>
<tr>
<td>Feb</td>
<td>55.5%</td>
<td>6,583</td>
<td>3,654</td>
<td>3.36</td>
<td>12,276</td>
</tr>
<tr>
<td>Mar</td>
<td>71.2%</td>
<td>6,726</td>
<td>4,789</td>
<td>3.36</td>
<td>16,091</td>
</tr>
<tr>
<td>Apr</td>
<td>76.3%</td>
<td>6,808</td>
<td>5,195</td>
<td>3.36</td>
<td>17,454</td>
</tr>
<tr>
<td>May</td>
<td>71.0%</td>
<td>6,707</td>
<td>4,762</td>
<td>3.36</td>
<td>16,000</td>
</tr>
<tr>
<td>Jun</td>
<td>73.1%</td>
<td>6,707</td>
<td>4,903</td>
<td>3.36</td>
<td>16,473</td>
</tr>
<tr>
<td>Jul</td>
<td>65.7%</td>
<td>6,707</td>
<td>4,406</td>
<td>3.36</td>
<td>14,806</td>
</tr>
<tr>
<td>Aug</td>
<td>61.0%</td>
<td>6,707</td>
<td>4,091</td>
<td>3.36</td>
<td>13,747</td>
</tr>
<tr>
<td>Sep</td>
<td>73.4%</td>
<td>6,732</td>
<td>4,941</td>
<td>3.36</td>
<td>16,603</td>
</tr>
<tr>
<td>Oct</td>
<td>77.3%</td>
<td>6,847</td>
<td>5,293</td>
<td>3.36</td>
<td>17,784</td>
</tr>
<tr>
<td>Nov</td>
<td>61.0%</td>
<td>6,805</td>
<td>4,151</td>
<td>3.36</td>
<td>13,948</td>
</tr>
<tr>
<td>Dec</td>
<td>45.3%</td>
<td>6,704</td>
<td>3,037</td>
<td>3.36</td>
<td>10,204</td>
</tr>
</tbody>
</table>

Source: Kem C. Gardner Policy Institute analysis of Omnitrak and STR, Inc., data

Commercial Overnight Accommodation Data Sources

Transient room tax revenues track overall Washington County visitation trends. Washington County accommodation sales are subject to a 4.25% county transient room tax. Based on Utah State Tax Commission records, Washington County’s transient room tax revenues more than tripled between 2010 and 2023, increasing from 4.8 million to 15.5 million after adjusting for inflation (see Figure 8). The sharp increase in transient room tax revenue from 2021-2023 coincides with a wave of during and post-COVID patterns and events, such as increased parks visitation (state and national), outdoor professional athletics events such as World Ironman, and youth sports tournaments.
We estimated the average number of Washington County hotel room visitors using STR’s average monthly hotel occupancy rates and average monthly hotel room counts, along with Omnitrak’s average travel party size (see Table 7). The largest share of Washington County overnight visitors stays in hotels. In 2023, STR surveyed 59 of 84 Washington County hotels to gather occupancy rates, daily room rates, and revenue per available room. Washington County’s hotels offered an average of 6,718 available nightly rooms. From 2021 to 2023, average monthly occupancy rates in Washington County ranged from 49% in the winter months to 67% in the summer months, with a drop in August and peaks of 77% in April and October. Compared with ten years ago (2011-2013), Washington County has experienced greater visitation in the fall, winter, and spring seasons over the past three years (see Figure 9).

Each month, travel research firm Omnitrak surveys and collects data from a panel of over 50,000 American travelers. According to Omnitrak, 239 travel survey respondents stayed overnight in Washington County in 2023. This domestic visitor group’s average annual travel party size was 3.36 persons per travel party.
Appendix

Appendix A: Washington County Census Tract Boundaries, 2020

Sources: Map by Kem C. Gardner Policy Institute, U.S. Census Bureau (census tract boundaries), Utah Geospatial Resource Center (roads).
### Appendix B: Washington County Census Tracts
#### 2020 Census Occupancy Rates and Household Size

<table>
<thead>
<tr>
<th>Census Tract Number</th>
<th>Occupancy Rate</th>
<th>Average Household Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>2701.01</td>
<td>85.6%</td>
<td>2.84</td>
</tr>
<tr>
<td>2701.02</td>
<td>66.2%</td>
<td>2.84</td>
</tr>
<tr>
<td>2702</td>
<td>68.8%</td>
<td>2.84</td>
</tr>
<tr>
<td>2703.01</td>
<td>82.1%</td>
<td>2.84</td>
</tr>
<tr>
<td>2703.02</td>
<td>91.5%</td>
<td>2.84</td>
</tr>
<tr>
<td>2704.01</td>
<td>85.4%</td>
<td>2.84</td>
</tr>
<tr>
<td>2704.02</td>
<td>75.2%</td>
<td>2.84</td>
</tr>
<tr>
<td>2706.01</td>
<td>81.6%</td>
<td>2.84</td>
</tr>
<tr>
<td>2705.01</td>
<td>82.7%</td>
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<tr>
<td>2705.02</td>
<td>88.4%</td>
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<tr>
<td>2706.02</td>
<td>42.7%</td>
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<td>2707.01</td>
<td>80.2%</td>
<td>2.84</td>
</tr>
<tr>
<td>2707.02</td>
<td>76.2%</td>
<td>2.84</td>
</tr>
</tbody>
</table>

Note: Average household size is calculated at the county level
Source: U.S. Census Bureau, Demographic and Housing Characteristics File: 2020

### Appendix C: Washington County Short Term Rentals by Census Tract, 2023

Source: Kem C. Gardner Policy Institute analysis of Lighthouse data
Appendix D: Washington County Short Term Rentals by Density, 2023

Endnotes
3. Omnitrak
8. The notable rise in Washington County transient room tax revenue from 2021 to 2023, as opposed to 2020 and previous years, stems from the establishment of numerous new hotels, resorts, and short term rentals, higher visitation rates at state parks, an uptick in hosting larger sporting events and business conferences, the filming of a new web series within the county, and strong attendance at the Tuacahn Center for the Arts.
9. Private homes include homes owned by a visitors’ friends and/or family.
10. Campground/RV Site includes visitors who stayed in their own or a rented recreation vehicle or tent, at either a public or private campground, or on public or private property.
11. Bed and breakfasts (B&Bs) are lodging establishments that offer guests overnight accommodations and breakfast.
12. Hotel room counts includes include total hotel room census in 2023, regardless of whether or not they were surveyed by STR.
14. Omnitrak does not survey international travelers.
15. Travel party size includes both those who live in and outside of survey respondent’s household.
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