ICORT 2026
Moscow, ID

FY27 Lodging Collections & Visit Idaho updates

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October 20, 2026



Lodging and Tax Collections YTD

FY27 Collections through Setember 2026

FY27 statewide tax collections are **$9,817,567**, up **13.2%** YoY.
FY27 projection is 3.5%

Every Region YTD is showing an overall increase:

Region 1: **10.6%**

Region 2: **8%**

Region 3: **14.5%**

Region 4: **8.2%**

Region 5: **9.4%**

Region 6: **23.4%**

Region 7: **7.15%**

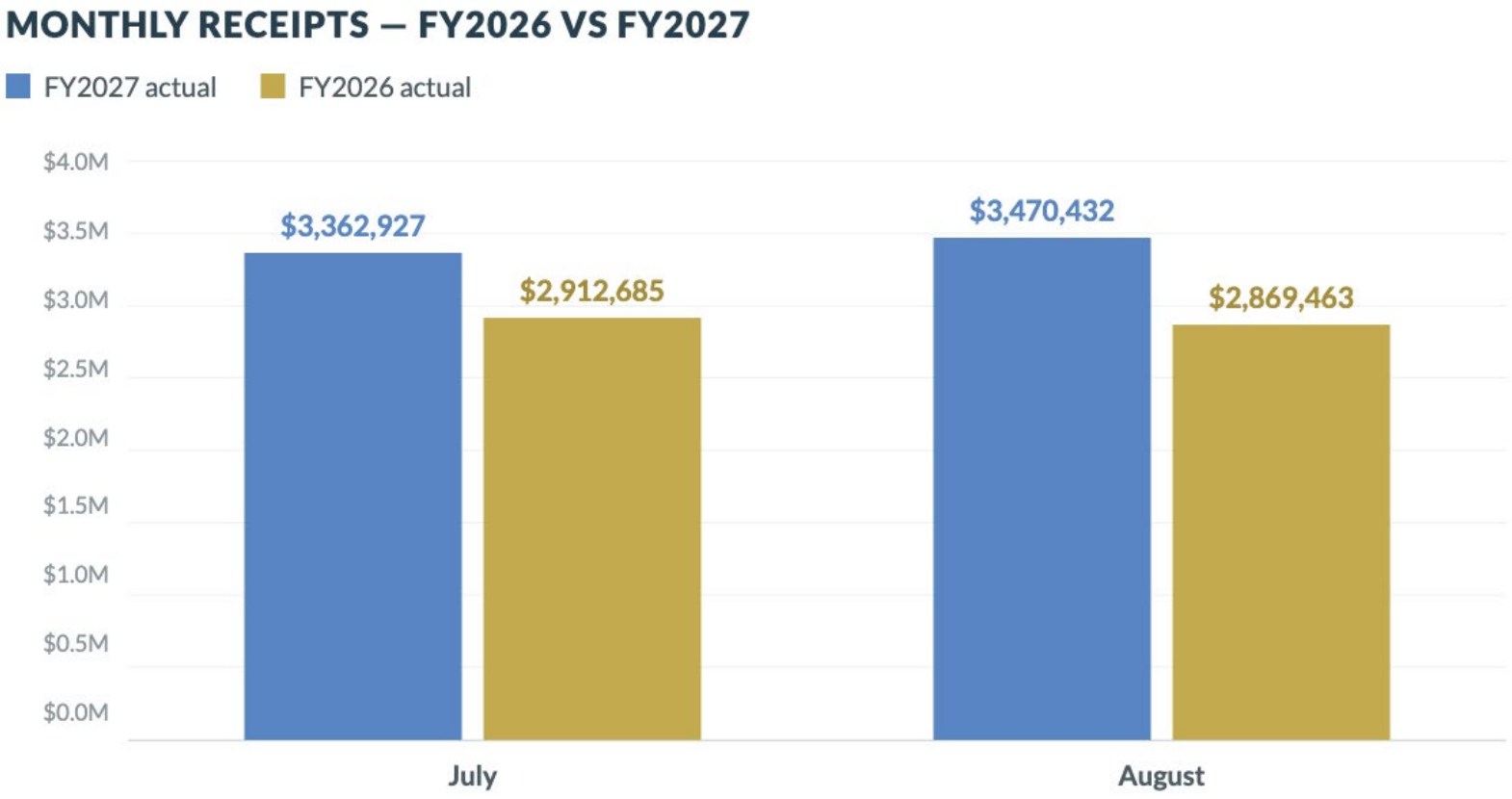
August 2026 Hotel Tax Collections

August statewide tax collections totaled **$3,470,432**, up **20.94%** from 2025.

AUGUST 2026 COLLECTIONS

$3.47M

▲ **20.94% YoY**

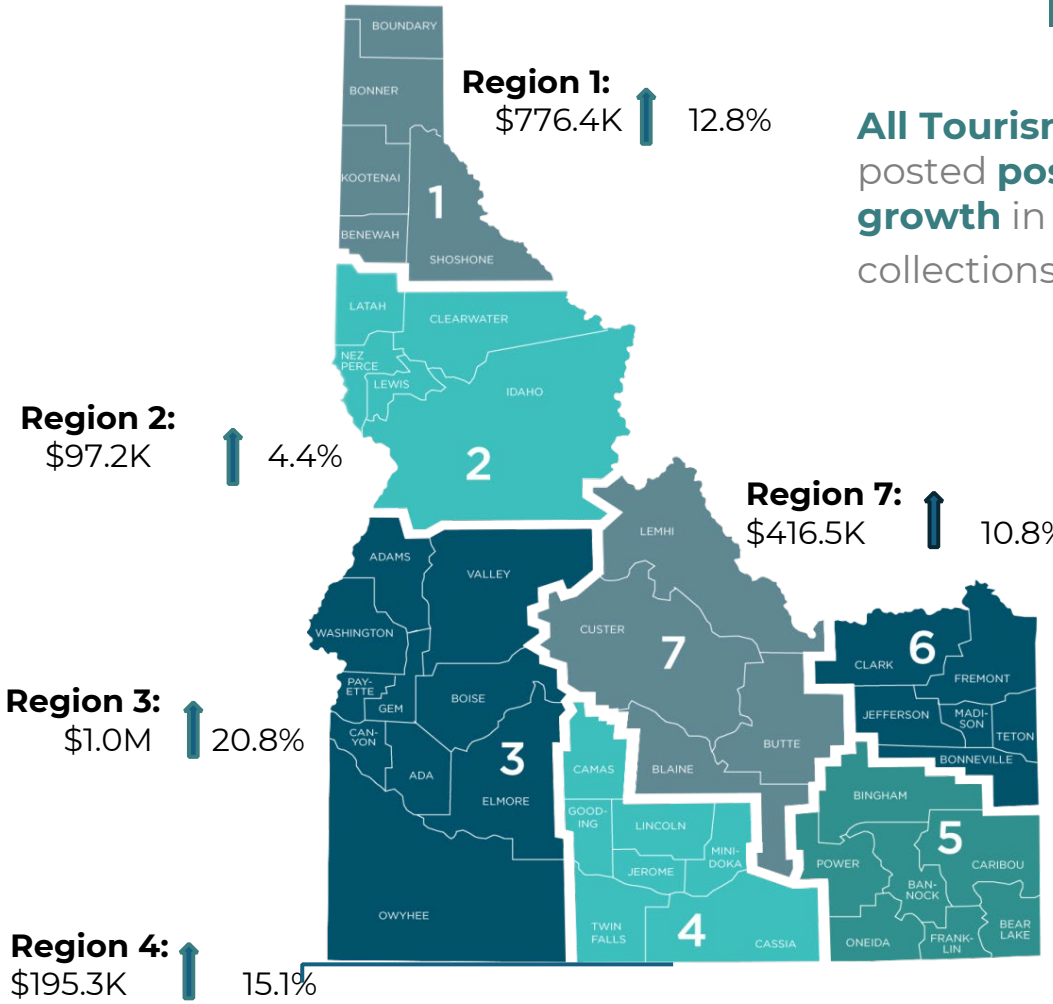


ITC Monthly Collection Report (Rainbow Report)

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August 2026 Hotel Tax Collections

Hotel Tax Collection



Region 1: $776.4K ↑ 12.8%

Region 2: $97.2K ↑ 4.4%

Region 3: $1.0M ↑ 20.8%

Region 4: $195.3K ↑ 15.1%

Region 5: $165.2K ↑ 11.3%

Region 6: $789.9K ↑ 26.3%

Region 7: $416.5K ↑ 10.8%

All Tourism Regions posted **positive YoY growth** in hotel tax collections.

ITC Monthly Collection Report (Rainbow Report)

August Lodging Performance Summary

Hotel & STR

August lodging performance was positive across both hotels and STRs. **Revenue** growth outpaced **demand** in both segments, as **higher rates** helped strengthen overall lodging performance across the state.

Aggregated Lodging Performance

Source: CoStar & KeyData

	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
Aug 2026	68.2%	$204.86	$139.73	1.2M	850.3K	$174.2M
YOY % Change	+5.3%	+6.1%	+11.6%	-2.5%	+2.7%	+8.9%
CYTD 2026	57.1%	$178.72	$101.97	9.8M	5.6M	$994.5M
CYTD YOY % Change	+7.3%	+4.1%	+11.7%	-1.2%	+6.1%	+10.4%

Hotel Performance (Idaho-Market)

Source: CoStar

	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
Aug 2026	76.5%	$165.86	$126.87	864.7K	661.4K	$109.7M
YOY % Change	+1.0%	+4.1%	+5.1%	+1.0%	+1.9%	+6.2%
CYTD 2026	65.8%	$146.21	$96.26	6.7M	4.4M	$648.1M
CYTD YOY % Change	+4.4%	+2.5%	+7.0%	+1.1%	+5.6%	+8.2%

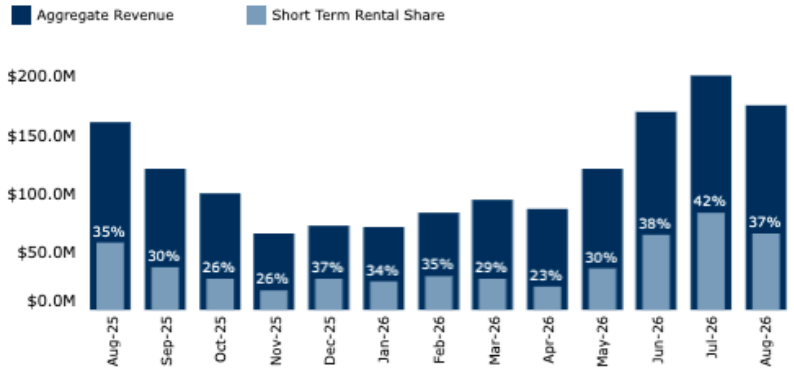
Short Term Lodging (State - Idaho)

Source: KeyData

	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
Aug 2026	49.5%	$341.45	$168.86	381.8K	188.8K	$64.5M
YOY % Change	+16.3%	+8.2%	+25.8%	-9.5%	+5.2%	+13.8%
CYTD 2026	37.5%	$306.04	$114.72	3.0M	1.1M	$346.4M
CYTD YOY % Change	+14.7%	+6.4%	+22.0%	-5.9%	+7.9%	+14.8%

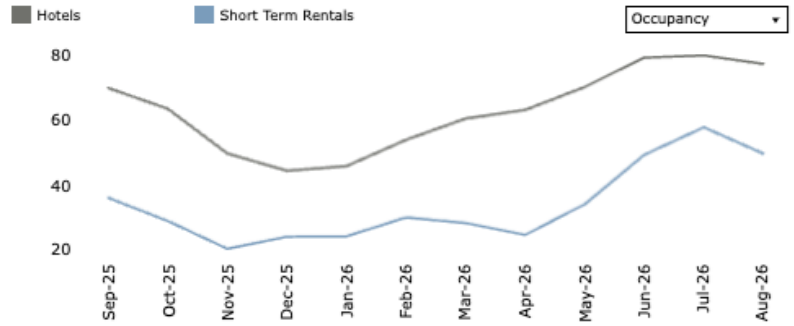
Lodging Revenue & Contribution

Hotels: Idaho-Market; Short Term Rentals: State - Idaho



Occupancy

Hotels: Idaho-Market; Short Term Rentals: State - Idaho
Last 12 Months



August 2026 Hotel Performance

August 2026 statewide room revenue reached **$109.7M**, up **6.2%** from 2025.

ROOM REVENUE
$109.7M
▲ 6.2% YoY

ROOM NIGHTS SOLD (DEMAND)
661.4K
▲ 1.9% YoY

AVERAGE DAILY RATE
$165.86
▲ 4.1% YoY

Rate growth helped boost revenue in August, alongside more modest but still positive demand gains.

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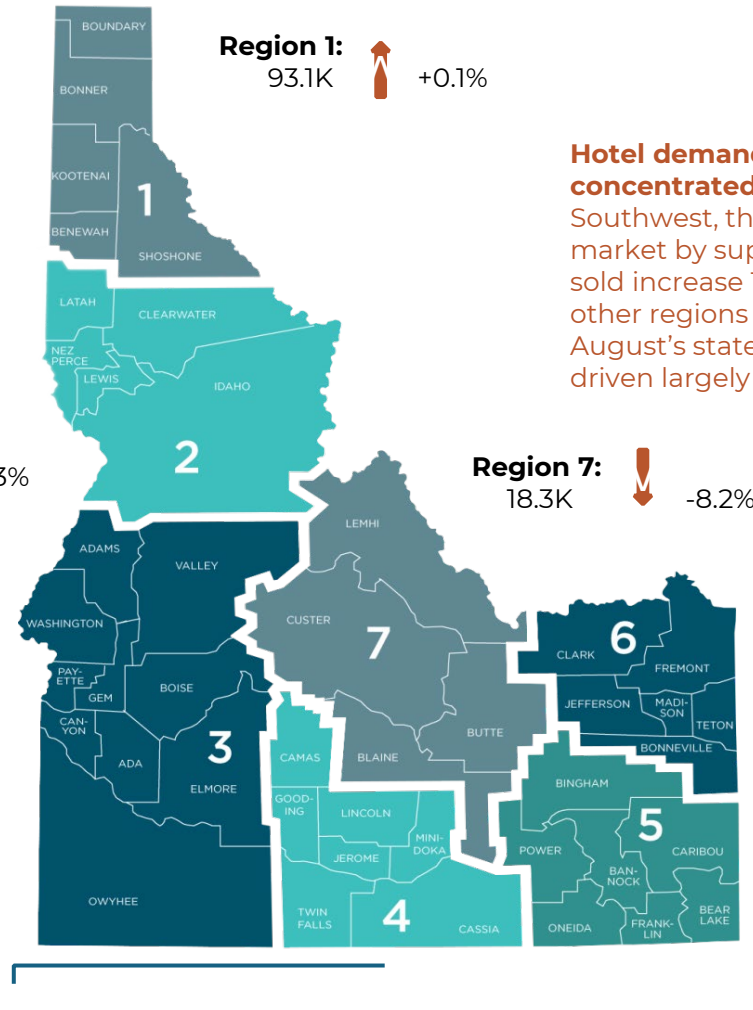
August 2026 Hotel Performance

Demand (Room nights sold)

STATEWIDE AUGUST DEMAND

661.4K

▲ 1.9% YoY



Region 1: 93.1K ▲ +0.1%

Region 2: 28.0K ▼ -6.3%

Region 3: 255.1K ▲ +10.5%

Region 4: 53.2K ▼ -1.5%

Region 5: 35.1K ▼ -3.5%

Region 6: 66.1K ▼ -3.0%

Region 7: 18.3K ▼ -8.2%

Hotel demand growth was concentrated in Southwest Idaho. Southwest, the state's largest hotel market by supply, saw room nights sold increase 10.5% YoY, while most other regions declined. As a result, August's statewide demand gain was driven largely by Southwest

Tourism Economics CoStar - August 2026

August 2026 Regional Hotel Performance Detail

August '26 statewide hotel occupancy reached **76.5%**, up **1.0%**, and ADR increased **4.1%** to **$165.86.**

Southwest paired stronger demand with higher rates to deliver the strongest overall hotel performance. The region grew room nights 10.5%, ADR 6.1% and revenue 17.3%. Elsewhere, rate growth helped soften weaker demand, particularly in Northern Idaho, where ADR rose 9.4%.

REGION	ROOM NIGHTS SOLD	OCCUPANCY	ADR	REVPAR	REVENUE
Region 1 Northern	93,132 ▲ 0.1%	73.8% ▼ 2.3%	$206.73 ▲ 9.4%	$152.59 ▲ 7.0%	$19.3M ▲ 9.5%
Region 2 North Central	28,023 ▼ 6.3%	63.3% ▼ 9.2%	$141.79 ▼ 3.2%	$89.70 ▼ 12.1%	$4.0M ▼ 9.3%
Region 3 Southwest	255,060 ▲ 10.5%	84.9% ▲ 8.2%	$162.88 ▲ 6.1%	$138.33 ▲ 14.8%	$41.5M ▲ 17.3%
Region 4 South Central	53,170 ▼ 1.5%	78.0% ▼ 1.5%	$142.28 ▲ 0.9%	$110.97 ▼ 0.6%	$7.6M ▼ 0.6%
Region 5 Southeast	35,076 ▼ 3.5%	67.4% ▼ 3.7%	$131.36 ▲ 1.9%	$88.58 ▼ 1.8%	$4.6M ▼ 1.7%
Region 6 Eastern	66,102 ▼ 3.0%	76.0% ▼ 0.4%	$141.80 ▲ 3.0%	$107.72 ▲ 2.6%	$9.4M ▼ 0.1%
Region 7 Central	18,259 ▼ 8.2%	70.1% ▼ 8.2%	$339.25 ▲ 4.4%	$237.88 ▼ 4.2%	$6.2M ▼ 4.2%
Idaho Statewide total	661,448 ▲ 1.9%	76.5% ▲ 1.0%	$165.86 ▲ 4.1%	$126.87 ▲ 5.1%	$109.7M ▲ 6.2%

▲ YoY increase ▼ YoY decrease

August ‘26 Short Term Rental Performance

August ‘26 statewide short term rental revenue reached **$64.5M**.

REVENUE
$64.5M
▲13.8% YoY

GUEST NIGHTS (DEMAND)
188.8K
▲ 5.2% YoY

AVERAGE DAILY RATE
$341.45
▲ 8.2% YoY

STRs saw healthy growth across both demand and pricing in August. Guest nights increased 5.2% YoY, while a stronger 8.2% increase in ADR helped push revenue up 13.8%.

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STR Performance

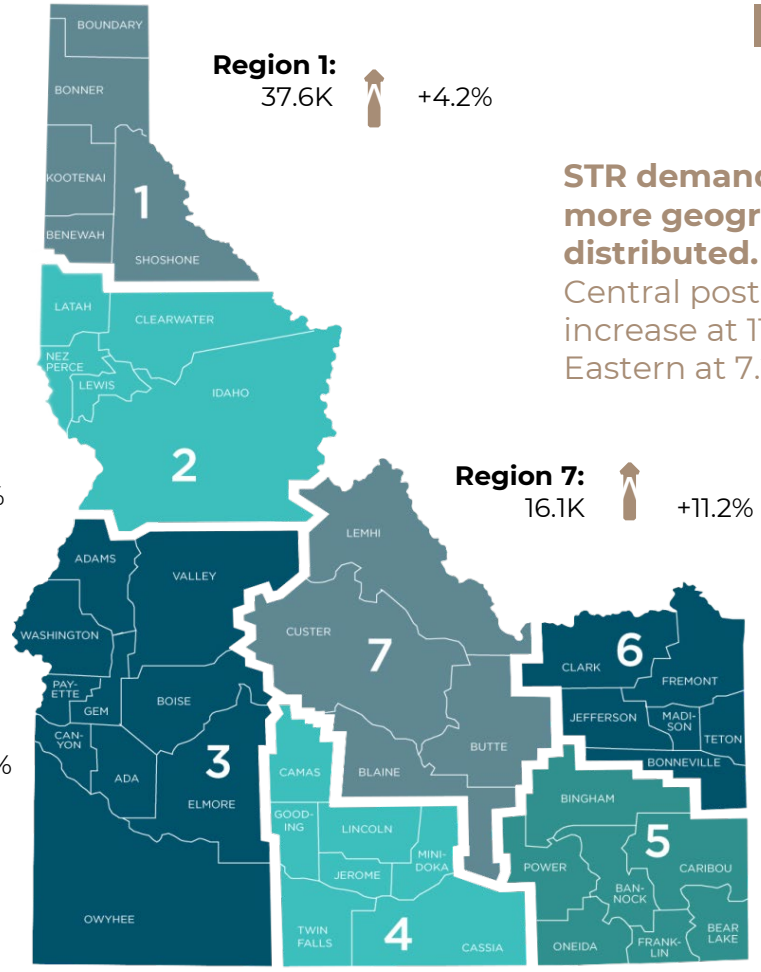
August '26 Short Term Rental Performance

Demand (Guest nights)

STATEWIDE AUGUST DEMAND

188.8K

▲ **5.2% YoY**



Region 1: 37.6K +4.2%

Region 2: 7.7K +1.1%

Region 3: 59.5K +4.5%

Region 4: 7.6K -0.5%

Region 5: 9.9K +2.2%

Region 6: 50.4K +7.2%

Region 7: 16.1K +11.2%

STR demand growth was more geographically distributed.
Central posted the strongest increase at 11.2%, followed by Eastern at 7.2%.

VISIT IDAHO UPDATES

VISIT IDAHO UPDATES

THE 3100 DOCU-SERIES- EMMY WINNER!!!



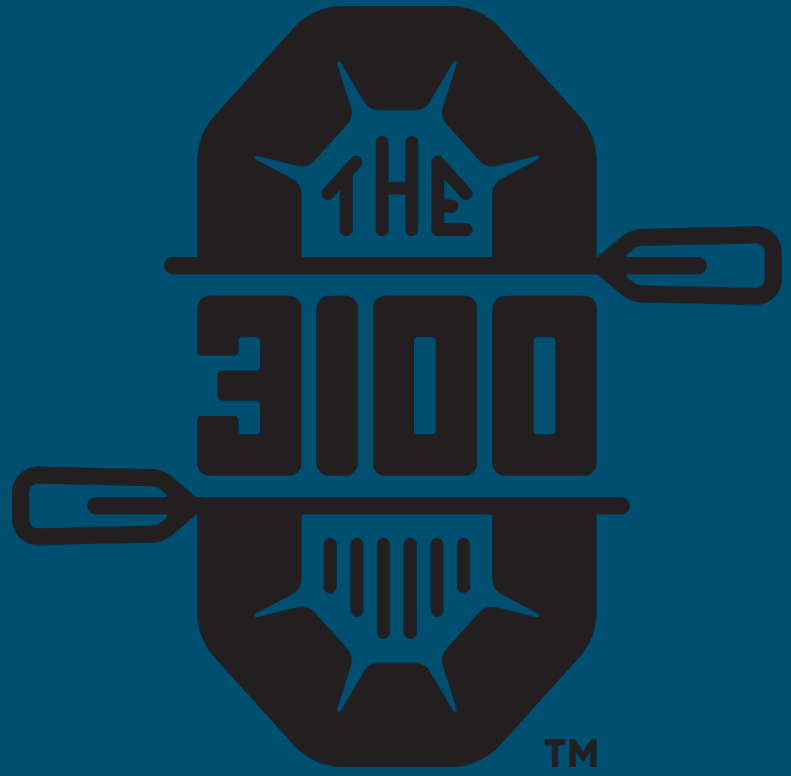
THE 3100 Featured on Idaho Today!



The 3100 Documentary on Amazon Prime!

Launching Monday, Nov 23







The 3100 Documentary



- Whole Foods Stores:
  - 575k bags in three key markets
    - Denver, Seattle, Salt Lake

- Enter to win a 6-day rafting trip donated by Orange Torpedo

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TRAVEL WITH CARE

Travel with Care
Lake Coeur d'Alene & Tubbs Hill Clean Up





TRAVEL WITH CARE

Travel with Care & Idaho Rivers United
Boise River Clean Up





North Fork Championship June 8-10, 2026



AJGA





VISIT IDAHO

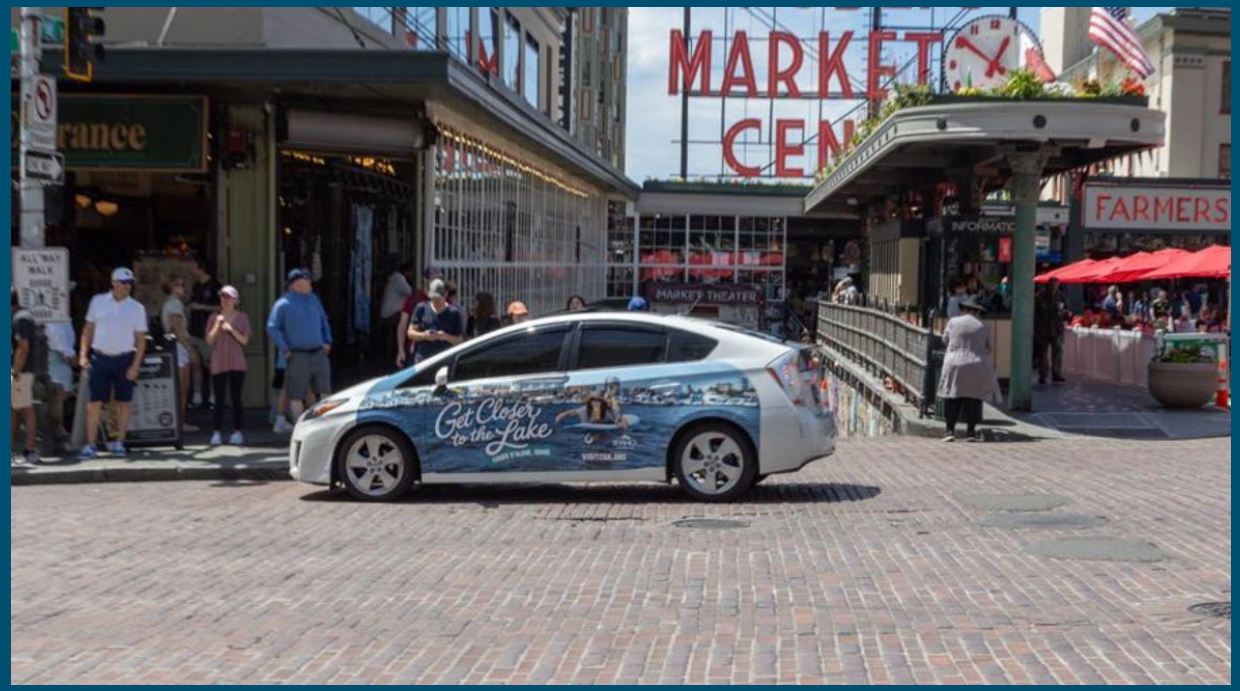
AJGA





FIFA World Cup





FIFA World Cup





FIFA World Cup





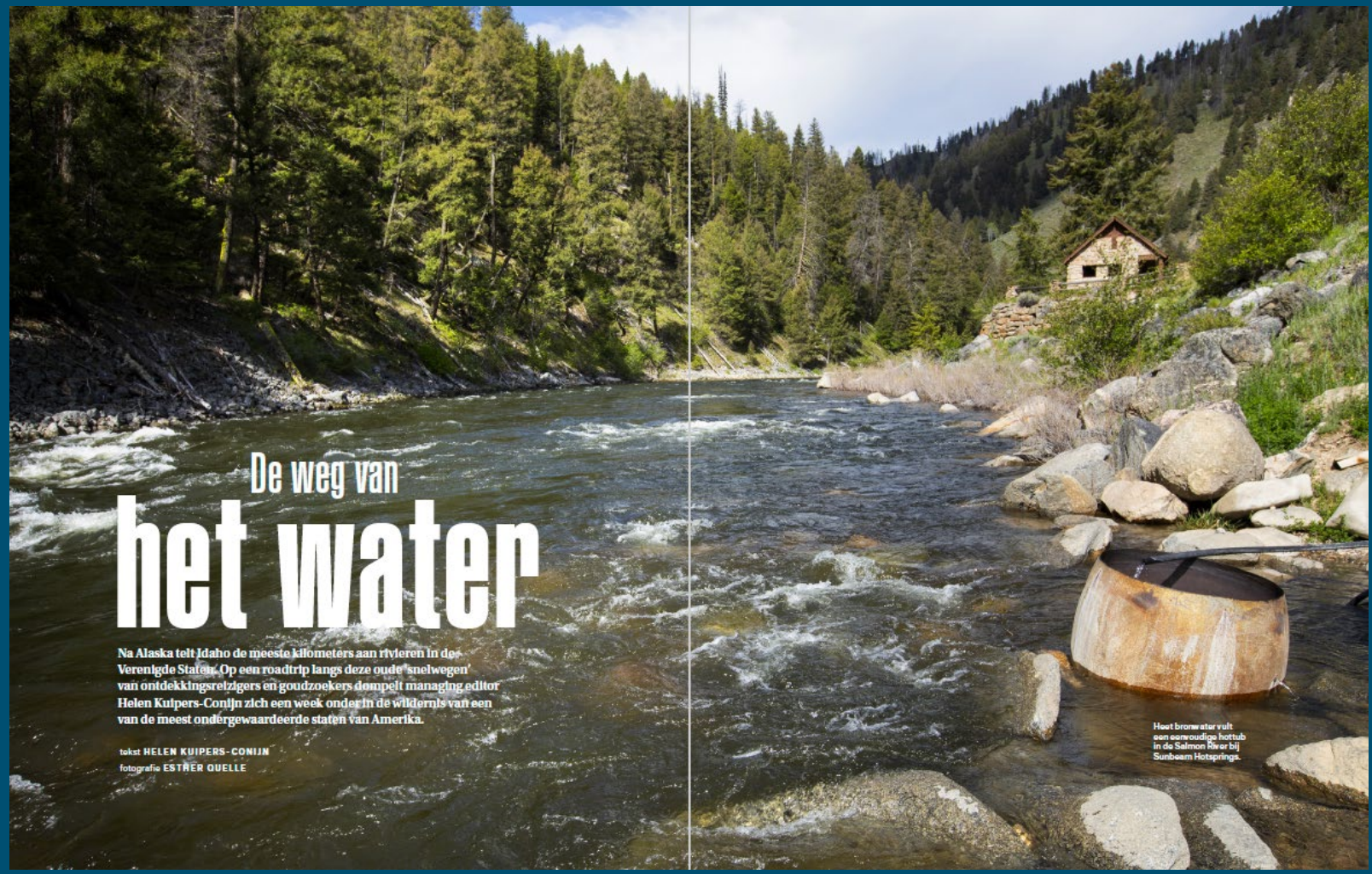
INTERNATIONAL UPDATE

- Hosted six international travel trade and media FAMs from six countries
  - Visited every region in the state!
  - Feature in National Geographic Traveler Magazine
- Sales Mission to Benelux, Germany & UK



INTERNATIONAL UPDATE





VISIT IDAHO

IPW (International Pow Wow)





BRAND USA TRAVEL WEEK, AMSTERDAM





UPCOMING EVENTS

- Tourism Talks 2027
  - March/Early April
- ITC 2027 Meeting Schedule To Be Announced Soon
- First ITC Quarterly Roundtable early February
- International Round Up (IRU) Idaho Falls, April 20-23, 2027

THANK YOU!