The State of Utah’s Travel and Tourism Industry, 2024

Utah’s travel and tourism industry maintains a positive trajectory despite challenges such as surging inflation, high gas prices, and U.S. recession fears.

February 2024
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Analysis in Brief

Utah’s travel and tourism industry is a key contributor to the state’s economy, fostering job creation, supporting local businesses, and generating tax revenue. The industry consists of private and public entities that promote leisure and business travel and provide tourism-related goods and services. The state’s commitment to preserving its unique natural and cultural heritage ensures that its travel industry not only enriches the lives of its visitors but also sustains the economic vitality of the region.

Visitors spent a record $11.98 billion in Utah’s economy in 2022, generating 98,600 direct travel-related jobs and $1.37 billion in direct state and local tax revenue. State visitation remained strong despite surging inflation, high gas prices, and fears about a possible recession.

Key Findings

- **Spending** – Visitors spent a record $11.98 billion in 2022, which led to $23.38 billion in total output for Utah’s economy when combined with indirect and induced effects.

- **Jobs** – Utah’s travel and tourism industry generated 98,600 direct jobs in 2022. The industry’s economic activity supported an additional 53,200 jobs through indirect and induced effects. About 9.0% of Utah’s total jobs were either directly or indirectly supported by visitor spending.

- **Tax Revenue** – Utah’s $11.98 billion in direct visitor spending, which led to $23.38 billion in total output, resulted in an estimated $2.12 billion in total tax revenue, including $1.09 billion in state and $1.03 billion in local tax revenue.

- **Accommodations** – Year-over transient room tax revenue increased an estimated 5.2% in 2023. Year-over hotel occupancy remained flat while hotel capacity increased 2.3%. Average daily hotel room rates and revenue per available room were up 3.9% and 3.2%, respectively.

- **Park Visitation** – Utah’s Mighty 5 national parks reported 10.6 million visitors, and state parks reported a record 12.0 million visitors in 2023. In addition, Utah’s national places, including monuments, recreation areas, and historic sites, reported a record 7.3 million visitors in 2023. Utah’s year-over national park and state park visitation were up 1.2% and 20.7%, respectively.

- **Ski Industry** – Utah boasted record snowfall (903”), skier days (7.1 million), and spending ($2.64 billion) during the 2022-2023 ski season.
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Introduction

Utah’s travel and tourism industry thrived over the past two years despite facing challenges like inflation, surging gas prices, and recession fears. Visitors spent a record $11.98 billion in 2022, which led to $23.38 billion in total output for Utah’s economy when combined with indirect and induced effects. The industry generated 98,600 direct travel and tourism-related jobs and indirectly supported an additional 53,200 jobs, comprising about 9.0% of Utah’s total employment. Visitor spending resulted in an estimated $2.12 billion in state and local tax revenue.

Utah’s accommodations sector maintained an upward trend in 2023. Year-over transient room tax revenue increased an estimated 5.2% in 2023. Year-over hotel occupancy remained flat while hotel capacity increased 2.3%. Average daily hotel room rates and revenue per available room were up 3.9% and 3.2%, respectively.

The state’s travel and tourism industry reached several milestones in 2023. Utah’s ski resorts experienced record snowfall, skier days, and spending during the 2022-2023 season. In addition, Utah’s national places, including monuments, recreation areas, and historic sites, reported a record 7.3 million visitors in 2023. Utah’s Mighty 5 national parks reported 10.6 million visitors, and state parks reported a record 12.0 million visitors in 2023. Utah’s year-over national park and state park visitation were up 1.2% and 20.7%, respectively.

These data demonstrate how Utah’s travel and tourism industry remained resilient in the face of recent economic challenges.

Various data years are referenced throughout the report, reflecting the latest available data for each respective data point.

Sources for information included in each report section are listed under the tables and figures or included in the report’s references section.

Overview and Outlook

Overview

All key areas of Utah’s tourism and hospitality sectors experienced positive performance over the past two years, including transient room tax revenue increases, employment growth, ski industry success, park visitation stability, and a rebound in urban travel.

From January to November 2023, county transient room tax revenue (TRT) increased 5.2% over the same period in 2022, and 21 of Utah’s 29 counties experienced year-over increases in TRT. Auto short-term leasing tax revenue increased 10.0% and restaurant tax revenue increased 8.7%. Year-over taxable leisure and hospitality sales increased 8.8% in the first half of 2023.

Preliminary employment data for the first half of 2023 indicates an estimated 7.2% year-over increase in Utah’s private leisure and hospitality sector jobs. Private museum and park jobs had the greatest percent increase (10.8%), followed by accommodations (9.6%), amusement and recreation (9.2%), performing arts (8.6%), and restaurants (6.3%).

The Salt Lake City International Airport reported a record number of passengers in 2023, despite general industry volatility due to escalating fuel prices, inflation, and a deceleration in domestic air travel. On November 1, 2023, airport officials announced the completion of Phase 2 of the airport’s redesign and unveiled 13 new Delta gates and 12 new restaurants.

Utah national and state park visitation trends varied by quarter in 2023. Year-over national park visitation fell 20.2% in the first quarter of the year, flattened during the second quarter, grew 7.0% by the third quarter, and was up 9.8% in quarter four. State park visitation started strong in 2023 (up 31.1% in the first quarter) and then decelerated the remainder of the year; however, 2023 was still a record year for state park visitation. By year’s end, national park visitation was up 1.2% from 2022, and state park visitation was up 20.7%.

Utah’s ski industry reported a record 7.1 million skier days and $2.64 billion in skier spending during the 2022-2023 ski season, up 21.7% and 11.0% respectively from the previous season. Record-setting snowfall in Utah’s mountains likely contributed to the unprecedented ski season.

Urban travel continued to rebound in 2023 compared with 2022. Downtown Salt Lake City’s hotel occupancy rate grew from 65.6% in 2022 to 67.6% in 2023, with a 3.5% year-over increase in average daily rates (ADR) and a 3.2% increase in revenue per available room (RevPAR). Hotel occupancy rates, ADR, and RevPAR were up in all four Wasatch Front counties in 2023. Visit Salt Lake reports that conference and convention delegate spending in Salt Lake County grew 31.7% in the first three quarters of 2023 compared to the same period in 2022 ($303 million vs. $230 million).

Utah’s Board of Tourism Development allocated over $4.7 million in traditional cooperative marketing matching funds in 2023. Cooperative marketing programs enable destination marketing organizations such as convention and visitor bureaus, county tourism offices, and nonprofit organizations to combine their marketing dollars with Utah Office of Tourism (UOT) matching funds to promote a wide variety of statewide destinations and events. The Office also approved over $1.2 million in grant money from the U.S. Economic Development Administration to 25 communities for 33 destination development projects across the state to enhance destination resilience.
Outlook

The 2024 travel outlook is robust as consumers continue to prioritize travel. Emerging markets such as China are poised to generate fresh travel demands long term. Other factors such as aging populations, economic cyclic shifts, public and private industry initiatives, climate change, and sustainability awareness will continue to shape travel demand and behavior globally. Future travelers will likely exhibit a growing desire for unique, personalized, and authentic experiences.

U.S. Travel Association forecasts a 5.2% year-over increase in domestic air travel in 2024, along with a 17.8% year-over increase in international travel. Domestic leisure travel is expected to grow 3.9% and domestic business travel 7.8%. Auto travel will continue to be the preferred transportation mode in 2024 with an expected 3.8% year-over increase.

While the 2024 travel and tourism forecast shows promising growth in various sectors, it is important to consider that global economic uncertainties such as inflationary trends, shifting economic policies, geopolitical tensions, international market volatility, and the re-initiation of student loan payments in the U.S. could impact travel costs and patterns.

Spending & Visitation

Utah’s travel and tourism industry fared better than the industry at the national level in 2022. While Utah’s 2022 statewide visitor spending was up 13.4% from 2021, U.S. travel spending was down 12.8%. In addition, growth in Utah’s leisure and hospitality sector jobs, which includes the arts, entertainment, and recreation sector along with accommodations and foodservice, was higher than leisure and hospitality sector job growth at the national level (Figure 1).

Tourism Economics (TE) reports that visitors directly spent $11.98 billion in Utah’s economy in 2022, which constitutes a 4.8% year-over increase after adjusting for inflation (Figure 2). Domestic visitors contributed 95.6% and international visitors 4.4% of this total spending, which was around half the international

<table>
<thead>
<tr>
<th>Figure 2: Direct Visitor Spending, 2018-2022</th>
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<tbody>
<tr>
<td>(Billions of 2022 Dollars)</td>
</tr>
<tr>
<td>2018</td>
</tr>
<tr>
<td>$10.54</td>
</tr>
<tr>
<td>Domestic</td>
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</tbody>
</table>

Note: Includes resident, domestic nonresident, and international visitor spending. Source: Tourism Economics

<table>
<thead>
<tr>
<th>Figure 3: Visitor Spending by Visitor Type, 2019-2022</th>
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<tbody>
<tr>
<td>(Billions of 2022 Dollars)</td>
</tr>
<tr>
<td>2019</td>
</tr>
<tr>
<td>$8.02</td>
</tr>
<tr>
<td>Domestic Resident</td>
</tr>
<tr>
<td>16.8%</td>
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<tr>
<td>75.2%</td>
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<tr>
<td>-8.0%</td>
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</tbody>
</table>

Note: Includes resident, domestic nonresident, and international visitor spending. Source: Kem C. Gardner Policy Institute analysis of Tourism Economics data

<table>
<thead>
<tr>
<th>Figure 4: Direct Visitor Spending by Visitor Type, 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Millions of Dollars)</td>
</tr>
<tr>
<td>Nonresident</td>
</tr>
<tr>
<td>$855.3</td>
</tr>
<tr>
<td>$8,863.9</td>
</tr>
<tr>
<td>Business Travel Spending (8.3% overall)</td>
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</table>

Source: Tourism Economics

<table>
<thead>
<tr>
<th>Figure 5: Direct Visitor Spending Shares by Category, 2022</th>
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</thead>
<tbody>
<tr>
<td>Nonresident</td>
</tr>
<tr>
<td>Shopping</td>
</tr>
<tr>
<td>25.1%</td>
</tr>
<tr>
<td>Entertainment &amp; Rec.</td>
</tr>
<tr>
<td>23.6%</td>
</tr>
<tr>
<td>Groceries</td>
</tr>
<tr>
<td>35.6%</td>
</tr>
<tr>
<td>Lodging</td>
</tr>
<tr>
<td>25.8%</td>
</tr>
<tr>
<td>Local Transportation</td>
</tr>
<tr>
<td>13.3%</td>
</tr>
<tr>
<td>Foodservice Jobs</td>
</tr>
<tr>
<td>16.4%</td>
</tr>
<tr>
<td>Accommodations Jobs</td>
</tr>
<tr>
<td>9.7%</td>
</tr>
<tr>
<td>Arts, Ent. &amp; Rec. Jobs</td>
</tr>
<tr>
<td>20.7%</td>
</tr>
<tr>
<td>U.S.</td>
</tr>
<tr>
<td>13.6%</td>
</tr>
<tr>
<td>Utah</td>
</tr>
<tr>
<td>7.6%</td>
</tr>
<tr>
<td>-14.4%</td>
</tr>
<tr>
<td>-8.5%</td>
</tr>
</tbody>
</table>

Note: Air travel spending has been removed. Source: Kem C. Gardner Policy Institute analysis of Tourism Economics data

spending share in pre-pandemic 2019 (8.0%) (Figure 3). Leisure travelers contributed 91.7% of the total spending and business travelers contributed 8.3% (Figure 4). Nonresident travelers spent the largest relative shares of their visitor dollars on lodging, local transportation, dining out, and entertainment/admissions (Figure 5). Utah resident travelers spent the largest relative shares of their visitor dollars on lodging, dining out, and entertainment/admissions (76.7%).

Business travelers contributed 8.3% (overall). Nonresident travelers contributed 8.5% (Figure 4). Nonresident travelers contributed 8.5% (Figure 4). Nonresident travelers contributed 8.5% (Figure 4). Nonresident travelers contributed 8.5% (Figure 4). Nonresident travelers contributed 8.5% (Figure 4). Nonresident travelers contributed 8.5% (Figure 4). Nonresident travelers contributed 8.5% (Figure 4).

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

Taxable sales in Utah’s leisure and hospitality sector experienced a 15.3% year-over increase (Table 1). The sectors with the greatest year-over change were performing arts and spectator sports (77.0%), followed by sales in drinking places (20.6%) and paid accommodations (19.9%). The proportion of sales in the “drinking places-alcoholic beverages” category has consistently increased over the last two decades. In 2020, sales in this category constituted half of total sales in the food services sector (Figure 6).

Five counties generated over three-quarters of Utah’s total leisure and hospitality taxable sales in 2022 (76.4%): Salt Lake, Utah, Summit, Washington, and Davis. Twenty-two of Utah’s 29 counties reported year-over increases in leisure and hospitality sales. Summit (25.1%), Salt Lake (22.2%), Carbon (20.6%), and San Juan (19.6%) counties reported the greatest year-over increases in tourism-related sales (Figure 7). Piute (-8.9%), Grand (-2.7%), and Kane (-2.6%) experienced the greatest year-over decreases in sales.

A quarter of Utah’s domestic nonresident visitors came from three states in 2022: California, Idaho, and Arizona (Figure 8). About one-in-three travelers were Utah residents. The largest share of international arrivals came from Canada (28%), followed by France (10%), and Mexico (8%) (Figure 9).
There was a 135.8% year-over increase in the number of international visitors to Utah in 2022 and a 195.6% year-over increase in international spending. Figure 10 shows the countries with significant year-over spending increases in Utah from 2021 to 2022. France tops the list (French visitors spent $50 million more dollars in 2022 than the previous year) followed by Canada, Germany, and the U.K. Spending by Chinese visitors dropped by $8.5 million dollars from 2021 to 2022. This is not uncommon as international spending shares fluctuate over time. For example, Asian visitor spending shares grew in Utah from 16.0% in 2009 to 31.0% in 2019 and then dropped to 15.0% post-pandemic (Figure 12). Similarly, European visitor shares dropped from 52.0% in 2009 to 13.0% in post-pandemic 2021, and rebounded to 54.0% in 2022.

Although international visitor spending did not reach the pre-pandemic levels of $700-800 million in 2022, Tourism Economics forecasts it will return to upwards of $700 million in 2023 (Figure 11).
SLC International Airport and Air Travel

Salt Lake City International Airport’s steady growth continued in 2023 with a 4.6% year-over-year increase in total passengers and a record 26.9 million passengers (Figure 13). The New SLC also completed Phase 2 of its Airport Redevelopment Project (ARP), which included facility updates to accommodate increased passenger flow and address safety and security needs. The ARP’s projected economic impact is $5.5 billion and the creation of over 3,300 jobs.

The New SLC’s Phase 2 included a 47.8% increase in gates (increasing from 46 gates in 2020 to 68 gates in 2023). These additional gates allow for new international routes and increased access to global markets. Total year-over international departures grew 5.3% in 2023 alone and was the greatest number ever reported. The new gates also accommodate larger aircraft, which is critical to the airport’s growth given the continuing trend of moving away from smaller regional flights. Increasing the use of larger aircraft also allows for more seats per flight. The airport’s number of seats per departure grew from 120 to 137—a 14.2% increase in five years (Figure 14). The New SLC’s expansion and air travel improvements offer Utah’s tourism industry a competitive edge and support economic growth statewide.

Park Visitation

Utah’s abundant parks—including five national parks, 11 national places, and 46 state parks—draw resident and nonresident visitors to the state year-round. According to the National Park Service (NPS), park visitors spent a record $1.7 billion in the Utah economy in 2022, a 2.9% year-over increase from 2021. This visitor spending generated 23,300 jobs, $863 million in labor income, and $2.6 billion in total economic output (Figure 15). Utah’s national park visitors spent the largest dollar shares on lodging, restaurants, and gasoline (Figure 16). Utah’s five national parks received a combined 10.6 million recreation visits in 2023, a 1.2% year-over increase. Prior to the pandemic, national park visitation hovered around 10.5 million visitors. In 2020, visitation dropped to 7.2 million due to park

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**Figure 13: Salt Lake City International Airport Total Passengers, 2019-2023**
(Millions of Passengers)

<table>
<thead>
<tr>
<th>Year</th>
<th>Domestic</th>
<th>International</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>26.8</td>
<td>26.8</td>
</tr>
<tr>
<td>2020</td>
<td>12.6</td>
<td>12.6</td>
</tr>
<tr>
<td>2021</td>
<td>22.4</td>
<td>22.4</td>
</tr>
<tr>
<td>2022</td>
<td>25.8</td>
<td>25.8</td>
</tr>
<tr>
<td>2023</td>
<td>26.9</td>
<td>26.9</td>
</tr>
</tbody>
</table>

Source: Kem C. Gardner Policy Institute analysis of Salt Lake City International Airport data

**Figure 14: SLC International Airport Seats Per Departure, 2014-2023**

<table>
<thead>
<tr>
<th>Year</th>
<th>The New SLC Phase 1</th>
<th>The New SLC Phase 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>105</td>
<td>120</td>
</tr>
<tr>
<td>2015</td>
<td>111</td>
<td>120</td>
</tr>
<tr>
<td>2016</td>
<td>113</td>
<td>124</td>
</tr>
<tr>
<td>2017</td>
<td>116</td>
<td>120</td>
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<tr>
<td>2018</td>
<td>120</td>
<td>120</td>
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<tr>
<td>2019</td>
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<td>120</td>
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<tr>
<td>2020</td>
<td>124</td>
<td>131</td>
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<tr>
<td>2021</td>
<td>131</td>
<td>137</td>
</tr>
<tr>
<td>2022</td>
<td>137</td>
<td></td>
</tr>
<tr>
<td>2023</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: The New SLC Phase 1 and 2 refer to airport renovation and expansion phases. Source: Kem C. Gardner Policy analysis of Salt Lake City International Airport data

**Figure 15: Utah National Park Annual Visitor Spending, 2014-2022**
(Billions of 2022 Dollars)

<table>
<thead>
<tr>
<th>Year</th>
<th>Spending</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>$0.2</td>
</tr>
<tr>
<td>2015</td>
<td>$0.4</td>
</tr>
<tr>
<td>2016</td>
<td>$0.6</td>
</tr>
<tr>
<td>2017</td>
<td>$1.0</td>
</tr>
<tr>
<td>2018</td>
<td>$1.4</td>
</tr>
<tr>
<td>2019</td>
<td>$1.7</td>
</tr>
<tr>
<td>2020</td>
<td>$2.0</td>
</tr>
<tr>
<td>2021</td>
<td>$2.3</td>
</tr>
<tr>
<td>2022</td>
<td>$2.7</td>
</tr>
</tbody>
</table>

Note: Includes Arches, Bryce Canyon, Canyonlands, Capitol Reef, and Zion National Parks. Source: National Park Service

**Figure 16: Utah National Park Visitor Spending by Spending Category, 2022**
(Billions of 2022 Dollars)

- 40.5% Lodging
- 16.1% Restaurants
- 7.5% Recreation Industries
- 6.4% Groceries
- 6.9% Retail/Shopping
- 3% Camping
- 8.6% Transportation
- 11.0% Gasoline

Note: Includes Arches, Bryce Canyon, Canyonlands, Capitol Reef, and Zion National Parks. Source: National Park Service
closures and restrictions, which was followed by a significant rebound in 2021 to a record 11.2 million visitors. National park visitation returned to pre-pandemic visitation levels in 2022 and 2023 (Figure 17).

During the first five months of 2023 (January through May), national park visitation was below 2022 levels; however, it increased in the remainder of the year (June through December). By the end of the year, four of Utah’s national parks, Arches, Bryce, Capitol Reef, and Canyonlands, experienced year-over-year visitation increases of 2.0%-4.0%, while Zion experienced a slight decline (down 1.5%) (Table 2).

Visitation to Utah’s national places set a new record in 2023 with 7.3 million combined visits (Figure 18). This record was due in large part to Glen Canyon National Recreation Area’s 83.2% year-over-year increase from 2.8 million to 5.2 million visitors (Table 3). The increase was prompted by higher-than-average snowpack that resulted in raised Lake Powell water levels, as well as newly enacted non-motorized boating permit requirements. The significant spring runoff allowed enhanced operations at multiple boat ramps within the monument—particularly Bullfrog Marina. Additionally, the non-motorized watercraft permitting system introduced in June 2023 helped track recreationists using pontoons, paddleboards, and kayaks on Lake Powell, thereby boosting annual Glen Canyon visitation counts.
Half of Utah’s other national places experienced a year-over decline in visitation, including Cedar Breaks, Dinosaur, Grand Staircase-Escalante, and Timpanogos national monuments.

Forty-four of Utah’s 46 state parks track monthly and annual visitation. These 44 state parks reported a record 12.0 million combined visitors in 2023, with annual total visits up 20.7% from the previous year (Table 4). Sand Hollow welcomed the largest number of annual visitors (1.4 million), followed by Dead Horse Point (1.1 million), and Snow Canyon (954,000), while Echo, Gunlock, and Piute state parks experienced the greatest year-over percent increases in visitation. Conversely, Red Fleet, Point of the Mountain Sky Park, and Camp Floyd experienced the greatest year-over percent decreases. Willard Bay had the largest year-over increase in actual number of visitors (339,000), while Red Fleet, historic Flight Path State Recreation Area, Historic Union Pacific Rail Trail, and This is the Place Heritage Park experienced the largest year-over percent decreases. Willard Bay State Park had the largest year-over percent increases in visitation. Conversely, Red Fleet, Point of the Mountain Sky Park, and Camp Floyd experienced the greatest year-over percent decreases. Willard Bay had the largest year-over increase in actual number of visitors (339,000), while Red Fleet, historic Flight Path State Recreation Area, Historic Union Pacific Rail Trail, and This is the Place Heritage Park experienced the largest year-over percent decreases.

Growth in Utah’s national park, national place, and state park visitation rates have diverged since 2017, with state park visitation climbing rapidly in recent years and national park and national place visitation flattening (Figure 19). Prior to 2017, national park, national place, and state park visitation growth rates were similar.

Ski Industry

Utah is home to 15 ski resorts, 10 of which are located within a one-hour radius of Salt Lake City International Airport. Utah celebrated both record snowfall and a banner ski season during the 2022-2023 winter. Alta Ski Resort recorded 903” of snow, which was 20.7% higher than the previous snow record set in 1981–1982 (748”) (Figure 20). Winter sports research firm RRC Associates (RRC) reported that Utah’s ski industry not only had the greatest number of skier days in history (7.1 million), but also the highest total skier spending ($2.64 billion) (Figures 21-22).
After adjusting for inflation, 2022-2023 skier spending was 5.8% greater than in 2021-2022, and nearly 32.1% higher than pre-pandemic 2019-2020.

Per-visit expenditures by skiers also reached their highest point in the 2022-2023 season, marking the most significant increase in at least a decade. RRC found that short term rentals were the most common lodging choice (34.0%), followed by traditional commercial lodging (29.0%), and staying with friends or family (18.0%) (Figure 23). There was a notable rise in the proportion of visits lasting seven nights or more, resulting in an average of 6.3 nights per overnight visit.

Utah residents accounted for most of Utah’s ski visitors (44.0%), with significant portions of nonresident visitors from California (8.3%), New York (4.2%), and Florida (3.2%). The share of international skiers (12.1%)—while larger than recent years—was still below the pre-pandemic share (15.6% in 2019-2020). This indicates that international travel has not yet fully recovered from the pandemic, which makes Utah’s banner 2022-2023 ski season even more impressive.

Finally, winter recreation employment in Salt Lake, Summit, and Weber counties grew 9.1% from 2022 to 2023 and 7.2% from pre-pandemic levels. This indicates a narrowing of the pandemic-impacted recreation employment gap that challenged Utah’s ski industry over the past few years (Figure 24).

Note: Biennial RRC research changed to annual research beginning in 2016/17; research halted in 2020/21 due to the COVID pandemic.
Source: Kem C. Gardner Policy Institute analysis of RRC Associates data

Note: First quarter (Jan-Mar) jobs only; jobs include full- and part-time private employment; self-proprieters are not included; Summit County jobs include leisure and hospitality sector; Salt Lake and Weber Counties include recreation jobs only.
Conferences & Conventions

Utah’s conference and convention industry experienced a period of recovery and strategic development in 2022. Visit Salt Lake’s 2022 annual report revealed that Salt Lake County’s conference and convention sector not only met but surpassed its objectives for the year. The achievement included booking 889,000 hotel room nights, exceeding its goal by 13.0%. The cumulative count of convention delegates, show and meeting attendees, and visitors to sporting and special events reached close to 575,000, contributing an estimated $226.4 million to Salt Lake County’s economy. This marked a substantial 234.6% increase from 2020.

Urban and business travel also increased in 2023. Downtown Salt Lake City’s hotel occupancy rate grew from 65.6% in 2022 to 67.6% in 2023, with a 3.5% year-over increase in average daily rates (ADR) and a 6.5% increase in revenue per available room (RevPAR). Downtown Salt Lake City’s monthly occupancy rate fluctuates with highs in Feb/March, June, and September (Figure 25). All four Wasatch Front counties experienced an increase in hotel occupancy rates, ADR, and RevPAR in 2023. Visit Salt Lake reports that conference and convention delegate spending in Salt Lake County ($303 million during the first three quarters of 2023) grew 31.7% from delegate spending during the first three quarters of 2022.

Visit Salt Lake anticipates a swift economic recovery for this sector, boosted by the Hyatt Regency, a new 26-story, 700-room hotel at the Salt Palace Convention Center that opened in fall 2022. The Hyatt Regency positions Visit Salt Lake to secure more and larger events. Visit Salt Lake also created a new division in 2021 called Sports Salt Lake (SSL). SSL was instrumental in bringing the NBA All-Star Game to Salt Lake City in 2023, as well as securing two rounds of the Men’s NCAA Division 1 Basketball Championships in 2024. By attracting large sporting events to Salt Lake City, SSL exceeded their goal of booking 270,000 hotel room nights in 2023 and have set a new goal of booking 330,000 room nights in 2024 (Figure 26).

On June 13, 2023, Salt Lake County established its first Convention and Tourism Assessment Area (CTAA). Participating hotels within this area imposed a 2% assessment on gross revenue from short term guest room rentals beginning October 1, 2023. Projections indicate that this assessment will contribute to a 50% boost in Salt Lake County’s annual budget, specifically earmarked to bolster endeavors to attract large conferences, conventions, meetings, and sporting events. This includes the development of new visitor profile research programs, both domestic and international marketing campaigns, expansion of marketing communication channels, growth in global travel trade and media outreach, as well as support for community programs. The Salt Lake County CTAA will be operational for five years.

Sundance Film Festival

The Sundance Film Festival started in Park City, Utah almost 40 years ago and is a popular event among locals and visitors. According to Y2 Analytics’ 2023 Sundance Film Festival economic impact report, over 86,800 people attended the festival in January 2023, and one-quarter of attendees were nonresidents. These out-of-state visitors spent an estimated $97.0 million in Utah during the festival. In total, the Sundance Film Festival contributed 1,600 jobs, 12.8 million in state and local tax revenue, $63.0 million in Utah wages, and $118.3 million in Utah gross domestic product.

The Sundance Film Festival was significantly impacted by the COVID-19 pandemic, but not until after the 2020 festival, which predated public event restrictions. Following 2020, Sundance developed an online version of the festival to accommodate attendees unable to travel to Utah. This resulted in more than 285,000 online views and associated ticket sales in 2023.

Figure 27 illustrates the pandemic’s impact on Summit County hotel and short term rental occupancy rates from 2020.
to 2023. The average Summit County hotel occupancy rate for the first week of the 2020 in-person festival (pre-COVID) was 62.2%. Post-pandemic, occupancy rates dropped for a few years before rebounding in 2023. Summit County short term rental data demonstrates a similar trend. Short term rental occupancy during the first week of the 2020 in-person film festival was 63.7%, followed by 49.6% and 54.6% in subsequent years. In January 2023, short term rental occupancy rates rebounded to pre-pandemic rates (62.6%) even when considering the 15.6% growth in Summit County’s short term rental inventory from 2020 to 2023.

Travel & Tourism Employment

Utah’s travel and tourism industry contributed to the creation of 98,600 direct jobs in 2022, propelling its statewide rank as a prominent industry sector from 8th to 7th based on job counts (Table 5). The industry’s economic impact supported an additional 53,200 jobs through indirect and induced effects (Figure 28). Table 6 delineates the top ten direct, indirect, and induced jobs in Utah supported by visitor spending across various sectors. This underscores how visitor spending plays a crucial role in sustaining employment beyond direct hotel, restaurant, and recreation visitor spending.

Utah’s tourism-related job sectors with the most significant year-over percent increases were amusement and recreation (20.4%), support activities for transportation (19.2%), and air transportation (15.1%) (Figure 29). These three sectors had the largest number of actual job increases compared with 2021, each adding approximately 1,500 to 2,000 jobs on a net basis. Conversely, the transit and ground transportation sector was the only travel and tourism-related sector to experience year-over job losses (-4.6%).

Table 5: Utah’s Top Ten Industry Sectors by Average Annual Number of Jobs, 2022

<table>
<thead>
<tr>
<th>Rank</th>
<th>Major Sector</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Health care and Social Assistance</td>
<td>193,520</td>
</tr>
<tr>
<td>2</td>
<td>Retail trade</td>
<td>174,460</td>
</tr>
<tr>
<td>3</td>
<td>Education services</td>
<td>173,700</td>
</tr>
<tr>
<td>4</td>
<td>Manufacturing</td>
<td>151,600</td>
</tr>
<tr>
<td>5</td>
<td>Construction</td>
<td>132,260</td>
</tr>
<tr>
<td>6</td>
<td>Professional &amp; Scientific &amp; Technical Svc</td>
<td>130,370</td>
</tr>
<tr>
<td>7</td>
<td>Travel &amp; Tourism</td>
<td>98,600</td>
</tr>
<tr>
<td>8</td>
<td>Admin., Support, Waste Mgmt, Remediation</td>
<td>96,300</td>
</tr>
<tr>
<td>9</td>
<td>Public Administration</td>
<td>85,730</td>
</tr>
<tr>
<td>10</td>
<td>Transportation and Warehousing</td>
<td>80,530</td>
</tr>
</tbody>
</table>

Note: Includes public and private full- and part-time employment, and sole-proprietors.
Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Economic Analysis data

Table 6: Utah’s Top Ten Direct, Indirect, and Induced Tourism Jobs by Sector, 2022

<table>
<thead>
<tr>
<th>Rank</th>
<th>Direct</th>
<th>Indirect</th>
<th>Induced</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Full-service restaurants</td>
<td>All other food &amp; drinking places</td>
<td>Limited service restaurants</td>
</tr>
<tr>
<td>2</td>
<td>Hotels</td>
<td>Other real estate</td>
<td>Hospitals</td>
</tr>
<tr>
<td>3</td>
<td>Other amusement &amp; recreation</td>
<td>Company/enterprise management</td>
<td>Full-service restaurants</td>
</tr>
<tr>
<td>4</td>
<td>Miscellaneous store retailers</td>
<td>Scenic &amp; sightseeing transportation/support</td>
<td>Other real estate</td>
</tr>
<tr>
<td>5</td>
<td>Air transportation</td>
<td>Employment services</td>
<td>General merchandise retailers</td>
</tr>
<tr>
<td>6</td>
<td>Transit and ground passenger transportation</td>
<td>Services to buildings</td>
<td>Physician offices</td>
</tr>
<tr>
<td>7</td>
<td>Grocery stores</td>
<td>Warehousing and storage</td>
<td>Grocery stores</td>
</tr>
<tr>
<td>8</td>
<td>Performing arts companies</td>
<td>Accountant, tax preparation, bookkeeping</td>
<td>Nonstore (internet-based) retailers</td>
</tr>
<tr>
<td>9</td>
<td>Gas Stations</td>
<td>Management consulting services</td>
<td>Individual &amp; family services</td>
</tr>
<tr>
<td>10</td>
<td>Museums, historical sites, zoos &amp; parks</td>
<td>Landscape &amp; horticultural services</td>
<td>All other food &amp; drinking places</td>
</tr>
</tbody>
</table>

Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Economic Analysis data
Private leisure and hospitality employment grew in every county throughout Utah in 2022, except for Emery, Juab, San Juan, Sanpete, Uintah, and Wayne. Juab County experienced the most significant year-over decline in leisure and hospitality jobs, followed by Emery County (Figure 30). The top three counties that contributed the most to the increase in leisure and hospitality jobs were Salt Lake, Utah, and Davis.

The counties with the highest proportions of private leisure and hospitality jobs to total private employment were Daggett (52.1%), Garfield (49.7%), Grand (46.4%), Kane (42.1%), and Summit (37.7%) (Figure 31).
Tax Revenue

The $11.98 billion in direct visitor spending, which led to $23.38 billion in total output for Utah’s economy when combined with indirect and induced effects, generated an estimated $2.12 billion in total state and local tax revenue. This was a 17.1% increase from 2021 (Figure 32).

Twenty-one of Utah’s 29 counties experienced positive year-over growth in county transient room tax (TRT) revenue from 2022 to 2023. Salt Lake County experienced the greatest increase in year-over TRT revenue ($2.2 million), followed by Summit County ($923,000), and Utah County ($459,000) (Figure 33). Grand, Kane, Rich, Garfield, Daggett, and Summit counties had the highest TRT revenue per household in 2022 (Figure 34).

Figure 33: Year-over Change in County Transient Room Tax Revenue by County, 2023
(Thousands of Dollars)

Figure 34: Transient Room Tax Revenue Per Household by County 2022

Note: Household data come from 2021 ACS 5-Year estimates.
Source: Kem C. Gardner Policy Institute analysis of Utah State Tax Commission and U.S. Census Bureau data
Hotel Occupancy & Rates

Utah’s average annual hotel occupancy rate in 2023 (64.1%) remained flat compared to the previous year (64.3%); however, Utah’s hotel capacity increased 2.3% during that same period. Year-over statewide hotel occupancy rates increased in January and July 2023, remained unchanged in May, June, September, and October, and experienced slight decreases in all other months. Occupancy rates in the past two years have exceeded the 2019 baseline during the winter and spring seasons, fallen below the baseline during the summer, and remained consistent with the baseline during the fall months (Figure 35).

Davis County had the highest average hotel occupancy rate of any county in 2023 (70.5%), while Wasatch County recorded the lowest (50.3%). Uintah County saw the most significant year-over increase in occupancy rates (6.6%), followed by Iron County (5.7%) and Millard-Juab (4.6%). Conversely, Carbon County experienced the most notable decline in occupancy rates (-11.0%), followed by Garfield-San Juan-Wayne (-6.7%) and Weber County (-5.0%).

Average hotel daily rates (ADRs) increased by 3.9% in 2023. Wasatch County reported the highest average annual ADR of $446, up from $368 in 2022, while Beaver County had the lowest at $98 (Figure 37). Among the 24 counties reporting ADRs, 13 observed year-over increases (Figure 37). Wasatch County saw the most significant percent increase from 2022 at 21.4%, followed by Millard-Juab with an 11.1% increase. In terms of absolute value, the largest year-over ADR increase occurred in Wasatch County, where the average annual ADR rose by $79 per nightly hotel stay.

Figure 36: Average Daily Room Rate (ADR) by County, 2023

Figure 37: Year-over Change in ADR by County, 2023

Note: No data exists for counties shaded light grey; Millard-Juab, Garfield-San Juan-Wayne, and Cache-Rich county rates are combined and averaged. Republication or other re-use of this data without the express written permission of STR is strictly prohibited.

Source: Kem C. Gardner Policy Institute analysis of STR, Inc. data
Short term Rentals

According to Lighthouse (formerly Transparent), a research firm specializing in short term rentals, there were 16,656 available short term rental properties statewide in 2019 and 26,459 in 2023. This marked a significant increase of 58.9% over the span of five years, with an annualized growth rate of 12.5% (Figure 38). Figure 39 illustrates the percentage growth in short term rental listings by county from 2022 to 2023, while Figure 40 shows the year-over change in the number of unique short term rental listings by county for the same period. The average number of short term rental listings increased from 2022 to 2023 in every county except Juab.

It is noteworthy that Utah experienced a substantial increase in short term rental capacity between 2019 and 2023, with an annualized growth rate of 12.5%, whereas the state’s hotel room capacity saw a much slower annualized growth rate of 1.5%. That said, short term rental occupancy declined in every quarter of 2023 while hotel occupancy either rose or remained stable (Figure 41). This suggests that Utah’s short term rental market may be reaching saturation.

Figure 42, which shows Utah’s short term rental owner/property manager distribution, reveals that approximately one-third of short term rental owners/managers listed one property in 2023, while one-third listed 2-20 properties, and one-third 21+ properties.

Travel & Tourism Industry — Other Indicators

Year-over, public and private jobs and wages across all travel and tourism industries grew in 2022 (Tables 7-10).
Figure 41: Year-Over Change in Statewide Hotel and Short Term Rental Occupancy Rates by Quarter, 2023
(Compared to Previous 12 Months)

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Hotel</th>
<th>Short Term Rental</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1 2023</td>
<td>-9.0%</td>
<td>-11.1%</td>
</tr>
<tr>
<td>Q2 2023</td>
<td>-6.5%</td>
<td>-3.3%</td>
</tr>
<tr>
<td>Q3 2023</td>
<td>0.2%</td>
<td>-0.6%</td>
</tr>
<tr>
<td>Q4 2023</td>
<td>-0.2%</td>
<td>0.5%</td>
</tr>
</tbody>
</table>

Note: Short term rentals include unique listings on Airbnb, VRBO, HomeAway, Booking, and TripAdvisor; rentals listed as “other” and subtypes listed as “shared room” have been omitted.
Source: Lighthouse (formerly Transparent)

Figure 42: Short Term Rental Owner Distribution, 2023

- 34.6%, One unit
- 20.6%, 2 to 5 units
- 8.3%, 21 to 50 units
- 7.1%, 51 to 100 units
- 6.2%, 11 to 20 units
- 7.2%, 6 to 10 units
- 7.1%, 100+

Source: Lighthouse (formerly Transparent)

Table 7: Utah’s Passenger Air Industry, 2018-2022

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Deplaned Passengers</th>
<th>Annual Change</th>
<th>Annual Change</th>
<th>Jobs</th>
<th>Annual Change</th>
<th>Wages (Millions)</th>
<th>Annual Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>12,777,748</td>
<td>5.6%</td>
<td>6,868</td>
<td>2.4%</td>
<td>$619</td>
<td>10.5%</td>
<td></td>
</tr>
<tr>
<td>2019</td>
<td>13,413,771</td>
<td>5.0%</td>
<td>7,415</td>
<td>8.0%</td>
<td>$723</td>
<td>16.7%</td>
<td></td>
</tr>
<tr>
<td>2020</td>
<td>6,273,574</td>
<td>-53.2%</td>
<td>6,598</td>
<td>-11.0%</td>
<td>$689</td>
<td>-4.7%</td>
<td></td>
</tr>
<tr>
<td>2021</td>
<td>11,197,049</td>
<td>78.5%</td>
<td>7,280</td>
<td>10.3%</td>
<td>$627</td>
<td>-9.0%</td>
<td></td>
</tr>
<tr>
<td>2022</td>
<td>12,882,012</td>
<td>15.0%</td>
<td>8,511</td>
<td>16.9%</td>
<td>$757</td>
<td>20.7%</td>
<td></td>
</tr>
</tbody>
</table>

Note: Jobs include full- and part-time employment; does not include proprietors.
Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics and Salt Lake City International Airport data

Table 8: Utah’s Arts, Entertainment, and Recreation Industry, 2021-2022

<table>
<thead>
<tr>
<th>Year</th>
<th>2021</th>
<th>2022</th>
<th>2021-2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private Employment</td>
<td>25,805</td>
<td>28,176</td>
<td>9.2%</td>
</tr>
<tr>
<td>Private Wages (Millions)</td>
<td>$794</td>
<td>$997</td>
<td>25.6%</td>
</tr>
<tr>
<td>Public Employment</td>
<td>7,175</td>
<td>7,454</td>
<td>3.9%</td>
</tr>
<tr>
<td>Public Wages (Millions)</td>
<td>$140</td>
<td>$153</td>
<td>8.9%</td>
</tr>
<tr>
<td>Taxable Sales (Millions)</td>
<td>$1,100</td>
<td>$1,343</td>
<td>22.1%</td>
</tr>
</tbody>
</table>

Note: Includes full- and part-time employment; does not include proprietors.

Table 9: Utah’s Accommodations Industry, 2021-2022

<table>
<thead>
<tr>
<th>Year</th>
<th>2021</th>
<th>2022</th>
<th>2019-2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employment</td>
<td>18,622</td>
<td>20,924</td>
<td>12.4%</td>
</tr>
<tr>
<td>Wages (Millions)</td>
<td>$575</td>
<td>$720</td>
<td>25.3%</td>
</tr>
<tr>
<td>Taxable Sales (Millions)</td>
<td>$2,617</td>
<td>$3,127</td>
<td>19.5%</td>
</tr>
</tbody>
</table>

Note: Includes full- and part-time employment; does not include proprietors.

Table 10: Utah’s Food Services Industry, 2021-2022

<table>
<thead>
<tr>
<th>Year</th>
<th>2021</th>
<th>2022</th>
<th>2021-2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employment</td>
<td>104,610</td>
<td>113,639</td>
<td>8.6%</td>
</tr>
<tr>
<td>Wages (Millions)</td>
<td>$2,129</td>
<td>$2,481</td>
<td>16.5%</td>
</tr>
<tr>
<td>Taxable Sales (Millions)</td>
<td>$6,534</td>
<td>$7,352</td>
<td>12.5%</td>
</tr>
</tbody>
</table>

Note: Includes full- and part-time employment; does not include proprietors.

Additional Travel & Tourism Topics

**Agritourism**

When agricultural businesses, such as farms and ranches, invite, entertain, and educate visitors as a way to generate income, it is called “agritourism.” Agritourists often participate in hands-on activities that allow them to experience and learn from agricultural operations. Several farms and ranches throughout the state of Utah have benefited from agritourism, as it provides additional income for owners and helps promote the protection of local farms. Agritourism can help benefit rural economies throughout the state of Utah by providing job opportunities, adding additional income for owners through recreational and educational activities, and increasing tourism traffic for other businesses in the region.

**Astrotourism**

Astrotourism includes travel that involves viewing celestial objects and events. Utah has the highest concentration of certified International Dark Sky Parks and Communities in the world, with 25 accredited dark sky places, including Utah’s five national parks, 10 state parks, and the three towns of Springdale, Helper, and Torrey. Utah has many areas where the Milky Way and starry skies are clearly visible, offering tourists the opportunity to star-gaze, look through telescopes, and photograph the beautiful night skies. Astrotourism is becoming more popular and is being widely promoted in the state of Utah as an additional type of tourism that could benefit the state’s economy.

In October 2023, Utah was in the unique position of having three out of its five national parks (Bryce Canyon, Canyonlands, and Capitol Reef) in the path of the annular eclipse. An annular eclipse takes place when the moon moves in front of the sun, leaving visible a thin ring of sunlight around the moon,
Figure 43: Occupancy Rates in Annular Eclipse Pathway Counties (Second Weekend in October), 2018-2022 Average vs. 2023

<table>
<thead>
<tr>
<th>County</th>
<th>2018-2022 (Avg.)</th>
<th>2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>76.7%</td>
<td>Hotels</td>
<td>77.8%</td>
</tr>
<tr>
<td>89.0%</td>
<td>Short Term Rentals</td>
<td>91.0%</td>
</tr>
</tbody>
</table>

Source: Kern C. Gardner Policy Institute analysis of STR, Inc., and Lighthouse (formerly Transparent) data

commonly referred to as the “ring of fire.” Even though an annular eclipse lasts only a few minutes, it drew significant visitation to southern Utah communities in the eclipse’s direct path. Hotel and short term rental occupancy rates in Utah’s eclipse path counties were up 12.0-13.0% compared with average rates during the same weekend in past years (Figure 43).

**Responsible Tourism**

Responsible tourism considers the current and future economic, social, and environmental impacts of the visitor economy while also addressing the needs of the visitors, industry, environment, and host communities. As Utah’s tourism economy grows, so does the threat to Utah’s natural, historical, and social assets. Responsible tourism’s pillars aim to protect visitor destinations, while at the same time increasing visitation for economic benefits. Responsible travel follows the principles of sustainable tourism and encourages tourists to benefit and protect the local environment, culture, and economy. This may include promoting greater visitor engagement in the local economy by encouraging visitors to purchase local supplies, hire local guides, eat at local restaurants, and visit popular destinations at off-peak times.

The Utah Office of Tourism’s (UOT) Red Emerald Strategic Plan promotes responsible tourism principles on a statewide basis. UOT also focuses on protecting Utah through the shared travel ethos “Forever Mighty” campaign, which encourages tourists to limit their strain on local resources and damage to the local environment, while maximizing their experience and benefitting the local economy. At a regional level, the city of Moab enacted responsible tourism initiatives such as the “Do It Like a Local” campaign, which promotes respecting the environment and reducing negative visitor impacts. Similarly, Summit County and Park City adopted a Sustainable Tourism Plan in the spring 2022 that aims to balance community and environmental benefits with economic benefits. This plan focuses on principles that support the local environment and community by mitigating tourism’s impacts, while promoting its benefits to the local community and environment. Similarly, Zion National Park developed a Green Parks Plan, which outlines ten goals to improve environmental performance. Washington County and Zion National Park are considering even more responsible travel initiatives as local water shortages and other environmental impacts are on the rise.

**Research Methods**

This section provides insight into the Gardner Institute’s analysis. The Gardner Institute defines key terms for conceptual clarity and to explain economic impact and tax revenue modeling in this report.

**Terms**

**Employment** is a measure of the average number of full-time and part-time jobs. Employment figures in this report include full- and part-time private and public jobs, and include self-employment, unless noted otherwise. An industry is a category for grouping similar types of companies. For uniformity, government agencies and researchers in the U.S. follow the North American Industry Classification System (NAICS), which federal agencies periodically update as new types of companies become common enough to warrant a new category. However, the travel & tourism industry is not one distinct industry but rather an assortment of industries, comprised of goods and services purchased prior to, during, and even after a trip. The travel and tourism industry can be characterized as an export industry when travel-related goods and services are purchased in Utah by nonresident visitors.

**Leisure and Hospitality Employment**. The leisure and hospitality employment sector, per the U.S. Bureau of Labor Statistics, comprises the arts, entertainment, recreation, accommodation, and foodservice industries (e.g. NAICS 711-722). Statewide, around 65% of all travel and tourism-related jobs are in the leisure and hospitality sector, while the other 35% are in several different sectors (e.g., transportation, real estate, rental and leasing, retail, personal services, etc.).

**Traveler Types**. Utah visitors are divided into two categories: residents and nonresidents. Resident travelers are Utahns who travel at least 50 miles away from home (one-way) for work or leisure either for a day trip or overnight stay. Nonresident travelers comprise both domestic and international travelers. Domestic nonresident visitors are American travelers who are not Utah residents, and international visitors include all travelers from outside of the U.S.
Modeling Economic and Fiscal Impacts

The travel and tourism industry supports individuals and businesses in many different industries. Total economic impacts include direct, indirect, and induced impacts. When Utah visitors purchase from Utah businesses, these are the direct effects, including the employees and earnings that are supported by these purchases. These businesses purchase inputs from other local businesses, who in turn may purchase from other local businesses. These rounds of activity produce indirect employment and earnings effects. Then, direct and indirect employees spend a portion of their earnings in the local economy, spurring additional "induced" effects. In the tourism industry, a direct spending example would be a visitor paying their hotel bill. Indirect spending would be the hotel owner purchasing bed sheets from an in-state linen company. Induced spending would include hotel employees and linen company employees spending their paychecks in the local community on things like rent, groceries, health care, etc.

Tourism Economics provided the Utah Office of Tourism with direct spending numbers. To estimate the indirect and induced impacts that resulted from this direct activity, the Gardner Institute customized a travel and tourism economic impact model for Utah. This customized model utilizes 2022 IMPLAN economic impact software as well as U.S. Bureau of Labor Statistics and U.S. Bureau of Economic Analysis data.

To estimate fiscal impacts, the Gardner Institute utilizes IMPLAN economic modeling software along with a customized Gardner Institute fiscal impacts calculator. The Institute's fiscal calculator uses effective tax rates and Utah State Tax Commission data to estimate the fiscal impacts related to the travel and tourism industry.

The Gardner Institute estimated tax revenue impacts for state and local sales taxes, personal and corporate income taxes, local property taxes, and other state taxes and fees (e.g., the travel and tourism portion of fuel tax revenue, boat registration fees, alcohol and tobacco taxes, etc.). The Gardner Institute limited its model to state and local governments because Utah federal tax collections have a relatively small impact on federal government receipts. Similarly, the Gardner Institute assumed federal spending in the state in a given year is largely independent of economic activity in Utah's industries, including the travel and tourism–related industries.
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