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The State of Utah's Travel and Tourism Industry

Utah's travel and tourism industry moderated in 2025 after years of post-pandemic expansion. Visitor spending, tourism employment, and urban sector travel remained strong despite dips in visitation, air travel, and accommodation sector indicators.

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Analysis in Brief

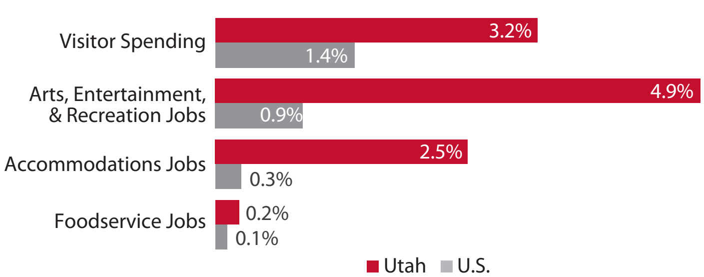
Utah's travel and tourism industry remains a major sector in the state's economy, supporting job creation, local businesses, and state and local tax revenue. Visitors spent a record $13.7 billion in Utah's economy in 2025, generating approximately 107,500 direct travel- and tourism-related jobs and $1.6 billion in direct state and local tax revenue.

Utah's tourism industry experienced mixed performance in 2025, reflecting possible normalization following several years of strong post-pandemic growth. Key indicators such as airport travel, park visitation, and skier days declined; however, tourism-related employment and visitor-generated tax revenue continued to grow. The industry includes private and public entities that facilitate leisure and business travel and provide tourism-related goods and services.

Key Findings:

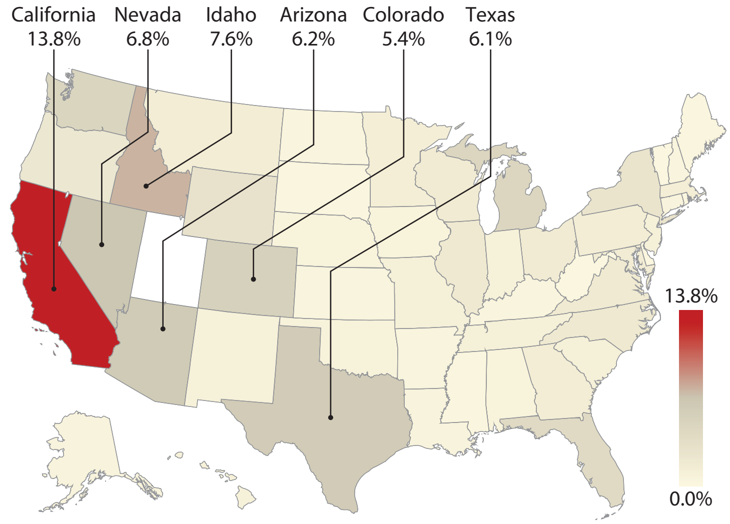
- **Spending –** Visitors spent $13.7 billion in Utah's economy in 2025, a 0.6% increase from 2024 (adjusting for inflation).
- **Jobs –** Utah's travel and tourism industry directly generated 107,500 jobs in 2025. The industry's economic activity supported an additional 59,700 jobs through indirect and induced effects, bringing the total to 167,200. This equates to approximately 1 in 10 Utah jobs.
- **Tax Revenue –** Visitor spending produced an estimated $1.6 billion in direct state and local tax revenue in 2025. This increases to $2.7 billion when including indirect and induced effects.

Year-Over Change in Travel Indicators, Utah vs. U.S., 2025



Source: Kem C. Gardner Policy Institute analysis of Tourism Economics, U.S. Travel Association, and U.S. Bureau of Labor Statistics data

Visa Card Spending Shares by Utah's Top Domestic Markets, 2025



Note: Includes consumer and business Visa card spending; does not include international visitor spending.
Source: Kem C. Gardner Policy Institute analysis of Visa Destination Insights data

- **Accommodations –** Year-over county transient room tax revenue was flat in 2025 (+0.2% after adjusting for inflation). Statewide hotel occupancy declined by 1.1 percentage points to 64.0%, while average daily rates declined by 0.8% (inflation-adjusted). Short-term rental inventory continued to expand, though demand softened mid-year leading to declining occupancy rates in the second and third quarters of 2025.
- **Airport Travel –** Salt Lake City International Airport received 28.2 million passengers in 2025, a slight decrease (-0.7%) from 2024's passengers (28.4 million).
- **Park Visitation –** Utah's national park visitation totaled approximately 10.6 million visits in 2025, a 4.5% decline from 2024. State park visitation declined 5.8% to 12.2 million visits, reflecting moderation after all-time high visitation in prior years.
- **Ski Industry –** Utah documented 4.8 million skier days during the 2025/26 ski season, a 26.5% decline from 2024/25 due largely to a record low snow season. Skier spending totaled $2.1 billion (down 17.8%), with spending per skier ($392) at an all-time high despite the drop in skier days.

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Introduction

Utah's travel and tourism industry appeared to normalize in 2025 after years of post-pandemic growth, with strong overall economic performance despite softer visitation, air travel, and accommodation trends.

Visitors spent a record $13.7 billion in 2025 representing a 0.6% inflation-adjusted increase over the prior year. This spending directly supported approximately 107,500 jobs, with the industry's economic activity sustaining an additional 59,700 jobs through indirect and induced effects. This equates to a total of 167,200 jobs—or roughly 1 in 10 statewide. Visitor activity also generated $1.6 billion in direct state and local tax revenue, which increases to $2.7 billion when including total economic impacts.

In 2025, several tourism indicators shifted toward more moderate growth. County transient room tax revenue increased across most of the state. At the same time, hotel performance softened, with statewide hotel occupancy rates declining from 65.1% to 64.0% and the average daily room rate (ADR) declining after adjusting for inflation (-0.8%). Short-term rental supply continued to expand, though short-term rental occupancy rates weakened mid-year suggesting slower demand relative to prior years.

Other tourism indicators also showed declines. Utah's ski industry recorded 4.8 million skier days in the 2025/26 season, down 26.5% from the previous year. The industry also saw declines in skier spending. National park visitation fell 4.5% to 10.6 million visits, while state park visitation declined 5.8% to 12.2 million visits. Air travel through Salt Lake City International Airport decreased slightly from 28.4 million to 28.2 million passengers, although these passenger volumes remained high compared to previous years.

These trends may reflect a transition from ongoing post-pandemic growth to a more stable and normalized tourism environment.

Travel and Tourism 2025 Overview

County transient room tax revenue increased in the majority of Utah's counties in 2025. Taxable sales in the leisure and hospitality sectors also continued to expand, indicating sustained visitor spending activity.

Growth in employment, however, was more mixed. Tourism employment had modest growth of 1.2% in 2025. Growth was strongest in the spectator sports, performing arts, and museums and parks sectors, while a variety of transportation-related industries (travel arrangements, gas stations, and transit and ground passenger sectors) experienced declines.

Passenger volumes at the Salt Lake City International Airport fell slightly from 28.4 to 28.2 million in 2025 but remained historically high. The airport's ongoing redevelopment projects—including expanded gate capacity, new amenities, and improved efficiency—strengthened its role as a key western hub positioned for future growth.

Utah's public lands remain a cornerstone of the state's tourism economy. The state's five national parks welcomed approximately 10.6 million visitors in 2025, a modest decline from 2024 but consistent with long-term trends of relatively high visitation. State park visitation declined 5.8% to 12.2 million visits following several years of significant growth.

Utah's ski industry also experienced a significant decline in 2025/26 (down 26.5%), with 4.8 million skier days and $2.1 billion in spending. This drop in ski visitation coincided with Utah's lowest snowfall on record.

Urban travel trends along the Wasatch Front were mixed in 2025, with Salt Lake County standing out among the Wasatch Front counties. Downtown Salt Lake City's hotel occupancy rates, average daily room rates (ADRs), and revenue per available room (RevPAR) all increased, supported by strong convention, sporting event, and business travel activity. Salt Lake City's investments in tourism infrastructure, including convention center redevelopment, sports and entertainment district establishment, and destination marketing initiatives have positioned the downtown area for continued growth.

Finally, Utah's Board of Tourism Development allocated nearly $4.2 million in traditional cooperative marketing matching funds in 2025. 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 various statewide destinations and events. The Board also allocated over $1 million in U.S. Economic Development Administration grant money to 20 communities across the state for 30 Destination Development projects that address destination resilience.

Travel and Tourism 2026 Outlook

The 2026 travel outlook reflects moderate but uneven growth in the United States, with forecasts indicating modest increases in both domestic and international visitation.

Continued advances in innovation, sustainability, and traveler personalization will shape the year ahead. AI is now a regular part of trip planning and booking, as well as travel destination experiences. New tourism-related fees, taxes, and incentives will also influence how and where people travel. Destinations across the country are increasingly adopting management tools such as visitor caps, timed-entry systems, and permit requirements, as well as broader strategies focused on sustainability and resident quality of life.

Projections show international visitation to the United States rebounding modestly in 2026 after falling 6.3% in 2025. According to the U.S. Travel Association's (USTA's) most recent forecast, international arrivals from overseas will rise 3.7% in 2026, partly due to the United States hosting major events like the FIFA World Cup. USTA also projects that domestic air travel, leisure travel, and business travel will grow around 2.0%. Recovery remains uneven across different international markets, however, and below pre-pandemic levels in some key areas (e.g., visitation from Canada, China, and Western Europe). Auto travel will continue to be the dominant mode of transportation, with an expected 2.0% year-over growth.

Travelers are increasingly prioritizing value such as taking shorter trips, pursuing off-peak travel, and seeking more budget-conscious options. Ongoing economic uncertainty, including inflationary pressures, interest rate changes, and potential policy shifts, may also influence both leisure and business travel in 2026. For example, global trade tensions, rising fuel costs, evolving visa requirements, and potential changes to airport security funding could affect travel flows and airport congestion. Ongoing labor constraints in the hospitality and transportation sectors may also have an effect.

Travel and Tourism: Visitor Spending and Profile

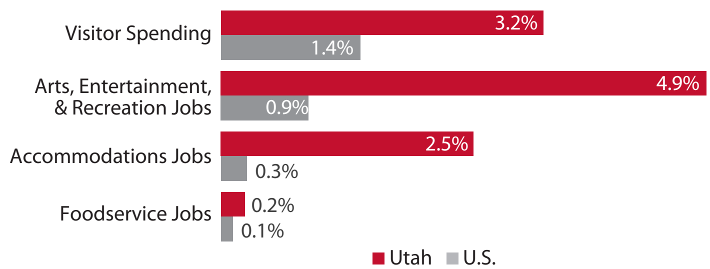
Utah outperformed the nation in year-over visitor spending growth, as well as arts/entertainment/recreation and accommodation job growth; however, Utah's food service industry remained flat year-over-year, mirroring national industry trends (Figure 1).

Tourism Economics (TE) estimates that visitors directly spent $13.7 billion in Utah in 2025, representing a 4.6% year-over nominal increase, or 0.6% after adjusting for inflation (Figure 2). The international share of visitor spending dropped from 7.9% to 7.2% in 2025, breaking from the upward post-pandemic trend over the past three years (Figure 3). Additionally, TE preliminary projections from May 2026 show a 6.1% year-over decline in Utah international visitor spending in 2025, including a 21.9% decrease in Canadian visitor spending.

Domestic nonresidents consistently dominated Utah's visitor mix from 2019 to 2025, though the share fluctuated over time (Figure 4). After accounting for 75.2% of visitors in 2019, this group peaked at 80.3% in 2021, which was likely due to post-pandemic effects, before hovering around 75% over the past few years. In contrast, resident traveler shares increased to 21.0% in 2020, suggesting a shift toward more in-state travel due to COVID-19, and then stabilized in the mid-to-high teens through 2025. The data reflects a temporary pandemic-driven shift toward more localized travel, followed by a gradual post-pandemic rebalancing.

Business travel accounted for 7.7% of total visitor spending in Utah in 2025 (down from 8.3%), while leisure travel represented 92.3% (Figure 5). More specifically, business travel spending accounted for 8.2% of nonresident and 5.6% of Utah resident visitor spending. Overall, spending by nonresident domestic and international visitors exceeded that of resident travelers by more than four-to-one.

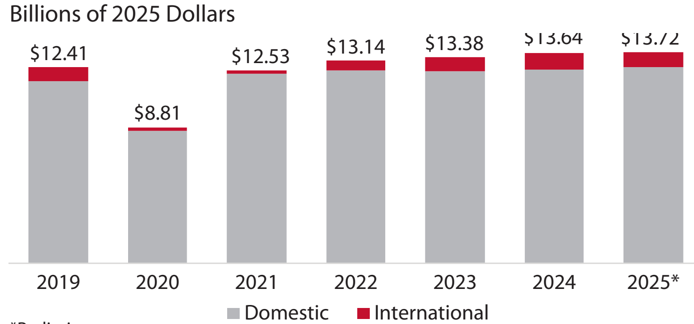
Figure 1: Year-Over Change in Travel Indicators, Utah vs. U.S., 2025



Source: Kem C. Gardner Policy Institute analysis of Tourism Economics, U.S. Travel Association, and U.S. Bureau of Labor Statistics data

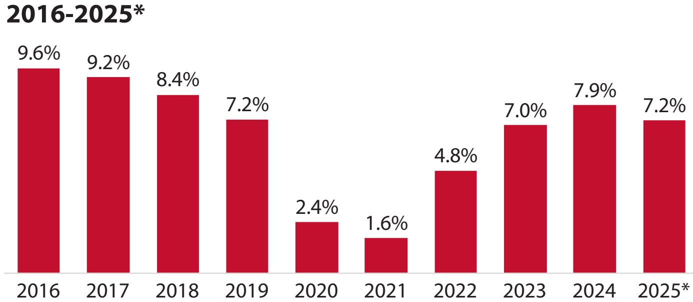
Figure 2: Direct Visitor Spending, 2019-2025*

Billions of 2025 Dollars



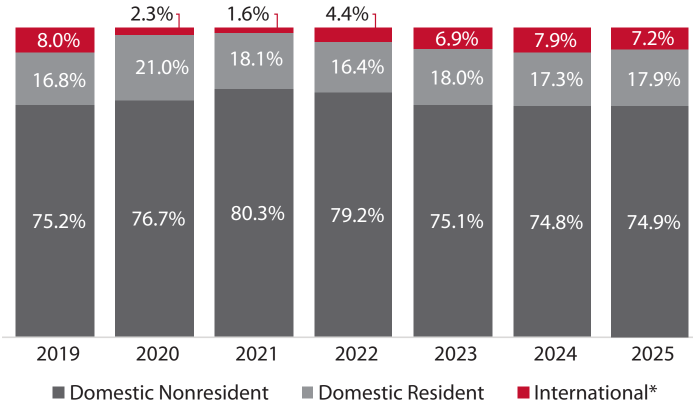
*Preliminary
Note: Includes resident, domestic nonresident, and international visitor spending.
Source: Tourism Economics

Figure 3: International Share of Direct Visitor Spending, 2016-2025*



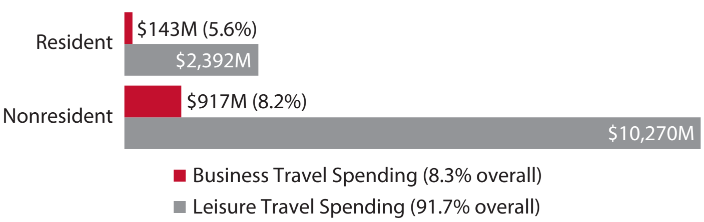
*Preliminary
Source: Kem C. Gardner Policy Institute analysis of Tourism Economics data

Figure 4: Spending Share by Visitor Type, 2019-2025



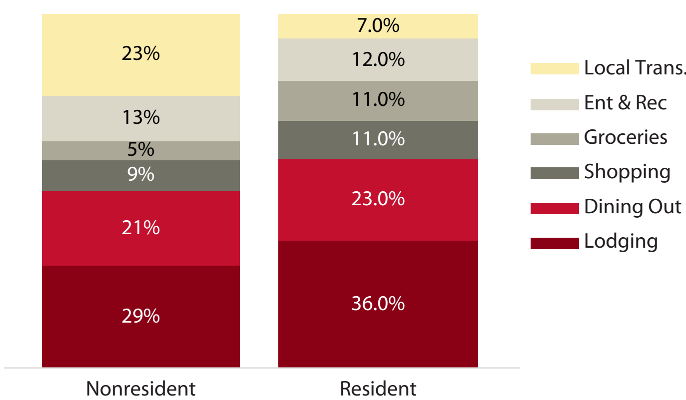
*Preliminary
Source: Kem C. Gardner Policy Institute analysis of Tourism Economics data

Figure 5: Direct Spending by Visitor Type, 2025



Source: Kem C. Gardner Policy Institute analysis of Omnitrak and Tourism Economics data

Figure 6: Direct Spending Shares by Category and Visitor Type, 2025

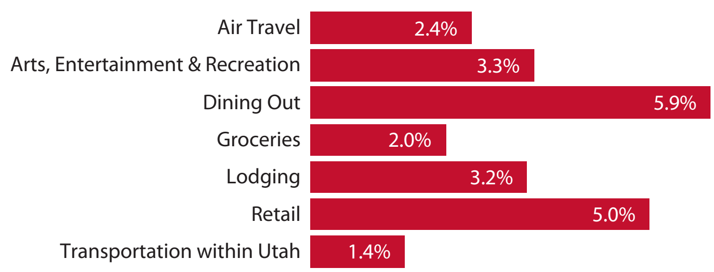


Note: Air transportation spending has been removed.
Source: Kem C. Gardner Policy Institute analysis of Tourism Economics data

Spending patterns in 2025 differed between nonresident visitors and Utah resident travelers. The largest shares of nonresident spending were lodging, local transportation, and dining out, while Utah resident travelers primarily spent their money on lodging, dining out, and entertainment and recreation (Figure 6). Spending on dining out experienced the strongest year-over growth among all tourism-related categories, followed by retail spending (Figure 7).

Taxable sales in Utah's leisure and hospitality sector in 2025 experienced a 4.0% year-over increase (Table 1). The sectors with the largest year-over change were performing arts/spectator sports and RV parks and camps. Sales in the museums/historical sites/zoos/parks sector had the greatest year-over decrease. Five counties—Salt Lake, Utah, Summit, Washington, and Davis—generated over three-quarters of Utah's total leisure and hospitality taxable sales in 2025 (Table 2). Morgan,

Figure 7: Year-Over Change in Visitor Spending by Spending Category, 2025



Source: Kem C. Gardner Policy Institute analysis of Tourism Economics data

Table 2: Leisure and Hospitality Taxable Sales, Top Ten Counties, 2025
Millions of Dollars

County	Taxable Sales 2025	County	Taxable Sales 2025
Salt Lake	$5.4	Weber	$0.7
Utah	$1.8	Grand	$0.3
Summit	$1.4	Cache	$0.3
Washington	$1.2	Wasatch	$0.3
Davis	$1.0	Iron	$0.2

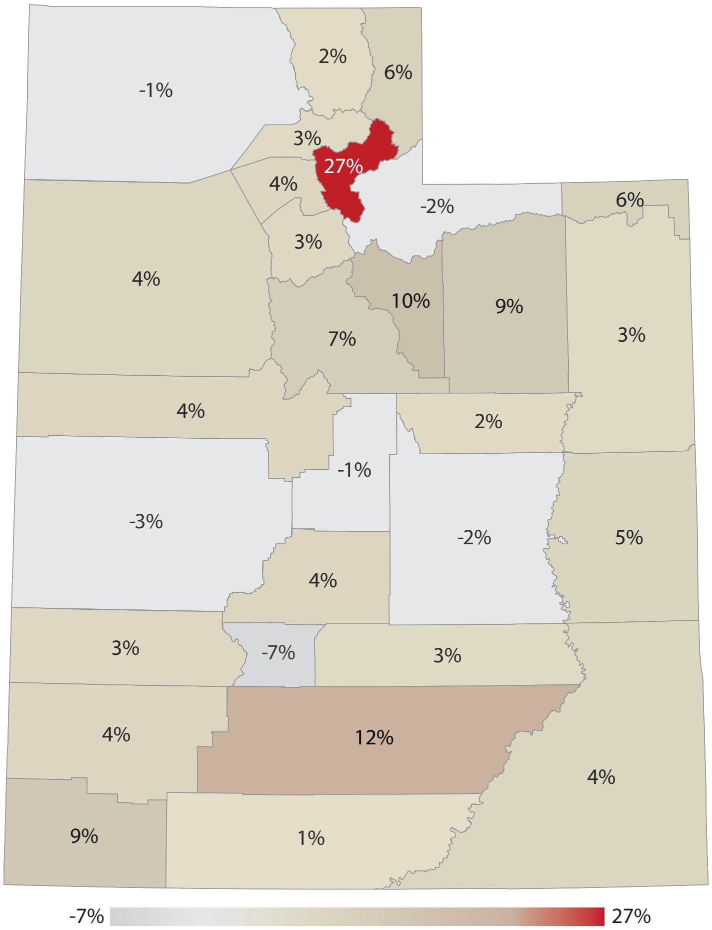
Source: Kem C. Gardner Policy Institute analysis of Tourism Economics and Utah State Tax Commission data

Table 1: Year-Over Change in Leisure and Hospitality Taxable Sales, 2025
Millions of Dollars

Industry	2024	2025	2024-2025 Change
Performing Arts, Spectator Sports, Related	$293	$325	10.7%
Museums, Historical Sites, Zoos, Parks, Similar	$93	$85	-9.0%
Amusement & Recreation	$1,159	$1,161	0.2%
Hotels, Motels, B&Bs, Resorts, Other	$3,385	$3,470	2.5%
RV Parks, Camps	$95	$101	6.7%
Restaurants & Other Eating Places	$7,241	$7,611	5.1%
Special Food Services, Food Carts	$653	$688	5.3%
Drinking Places (alcoholic beverages)	$245	$244	-0.2%
Total	$13,164	$13,685	4.0%

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

Figure 8: Year-Over Change in Leisure and Hospitality Taxable Sales, 2025



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

Garfield, Wasatch, Washington, and Duchesne counties reported the most significant year-over increases (Figure 8). Conversely, Piute, Millard, Emery, Summit, and Sanpete counties experienced the greatest year-over decreases.

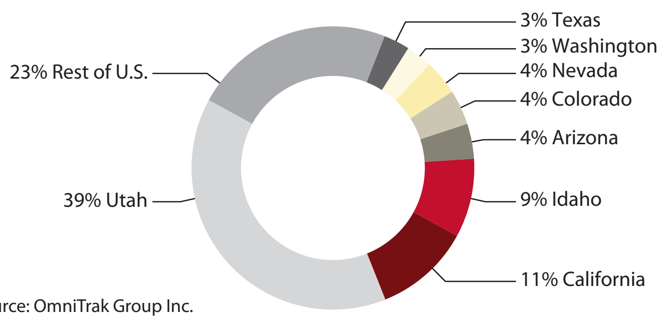
Utah residents accounted for 39% of all domestic travelers within the state in 2025. Among domestic nonresident visitors, approximately one-quarter originated from three western states: California, Idaho, and Arizona (Figure 9). Visitors from Canada led international arrivals, followed by travelers from France and Mexico (Figure 10).

According to Visa Destination Insights, total domestic nonresident visitor Visa card spending was $4.3 billion in 2025 (up 7.6% from $4.0 billion in 2024). Visitors from California generated the highest level of spending at $593 million, followed by Idaho ($324 million) and Nevada ($292 million) (Figure 11). Together, these three states accounted for nearly one-third of all out-of-state Visa card spending in Utah.

International Visa card spending ($185 million) declined 6.1% (or $12 million) in 2025 (Figure 12).[1] This decline was largely due to a drop in Canadian visitors—Utah's largest international market (Figure 13). Visa card spending by visitors from Mexico and France declined by 2% and increased by 4%, respectively. Visa card spending was also up for visitors from the United Kingdom, Australia, and Peru. China, Canada, and Germany had the largest year-over spending declines.

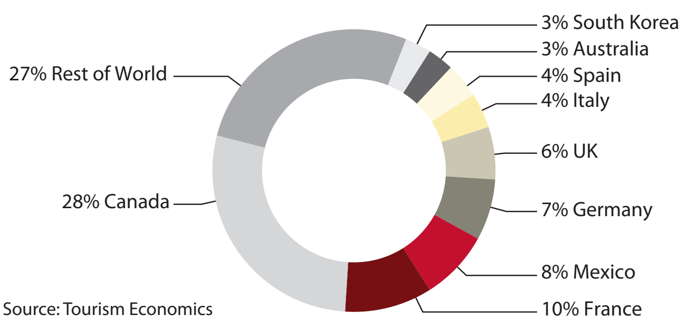
In terms of absolute dollars, Visa card spending by Italian visitors increased by nearly $1 million, followed by the United Kingdom (+$716,000) and Argentina (+$637,000).

Figure 9: Share of Domestic Visitors by State, 2025



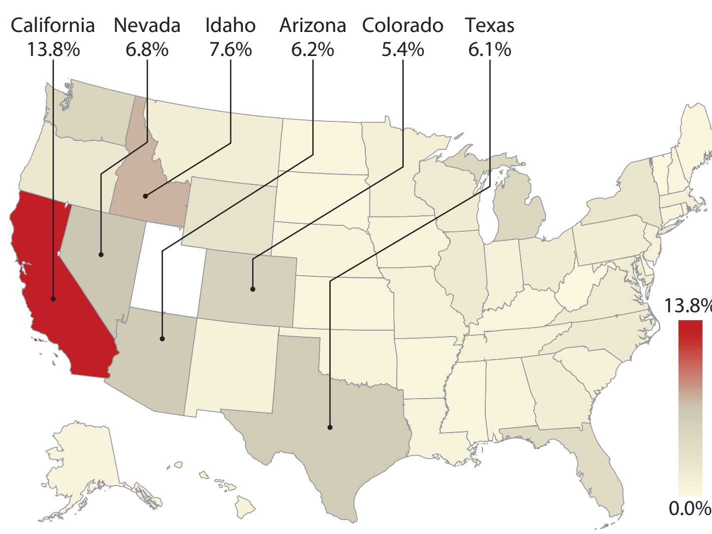
Source: OmniTrak Group Inc.

Figure 10: Share of International Arrivals by Country, 2025



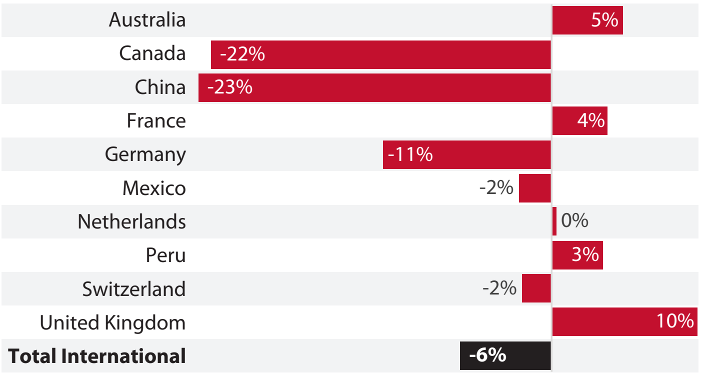
Source: Tourism Economics

Figure 11: Visa Card Spending Shares by Utah's Top Domestic Markets, 2025



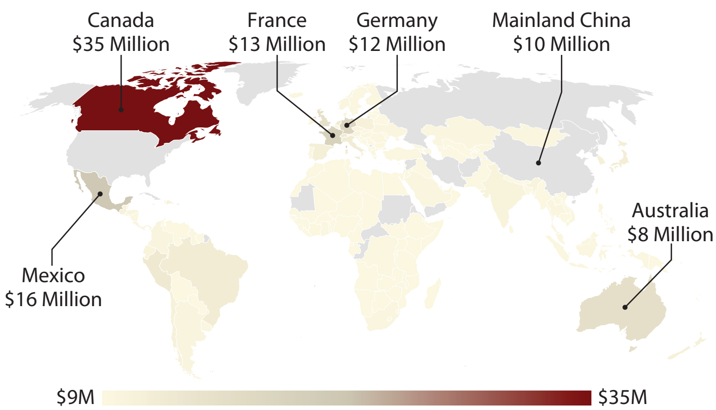
Note: Includes consumer and business Visa spending; does not include international visitor spending.
Source: Kem C. Gardner Policy Institute analysis of Visa Destination Insights data

Figure 12: Year-Over Change in Visa Card Spending by Utah's Top International Markets, 2025*



*Preliminary
Source: Kem C. Gardner Policy Institute analysis of Visa Destination Insights data

Figure 13: Visa Card Spending by Utah's Top International Markets, 2025



Note: Includes consumer and business Visa card spending; does not include domestic visitor spending.
Source: Kem C. Gardner Policy Institute analysis of Visa Destination Insights data

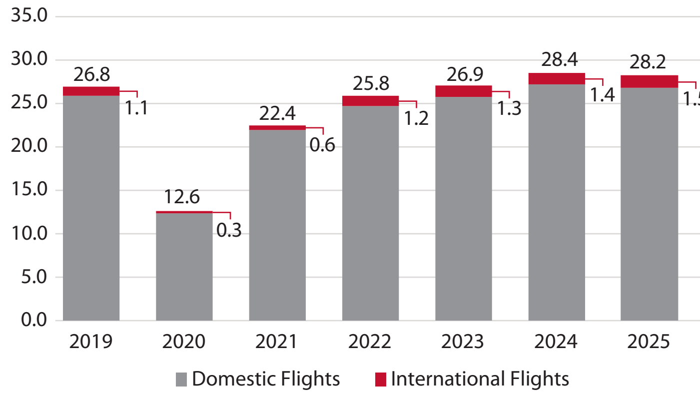
SLC International Airport and Air Travel

Salt Lake City International Airport (SLC) reported 28.2 million passengers in 2025, representing a slight year-over decline (-0.7%) (Figure 14). Despite this modest dip, overall passenger volumes remain historically high, reflecting continued strength in regional travel demand.

AirHelp ranked SLC International Airport as the #1 airport in the United States in 2025 and #8 globally based on metrics including on-time performance, customer service, and claims processing (Figure 15).[2] This recognition highlights SLC's operational performance and passenger experience, aided by its continued improvements during its ongoing redevelopment. By early 2026, SLC completed its Phase 3 expansion, including a concourse buildout, expanded gate capacity, and enhanced passenger amenities.[3] These improvements increased efficiency, reduced congestion, and supported future growth in both domestic and international travel.

Figure 14: Salt Lake City International Airport, Total Passengers, 2019-2025

Millions of Passengers



Source: Salt Lake City International Airport

SLC continues to grow as a prominent western hub, particularly for Delta Air Lines, with incremental additions to routes and frequencies. While international service remains below pre-pandemic levels in some long-haul markets, SLC gradually rebuilt and expanded international connectivity by adding its first direct flights to Asia (Seoul, South Korea in June 2025) and South America (Lima, Peru in December 2025).[4,5]

SLC's redevelopment focused on technology and passenger convenience, including biometric screening options, improved security, and enhanced digital wayfinding tools. Sustainability initiatives, such as energy-efficient infrastructure and long-term plans for reduced emissions, remain a key component of the airport's development strategy.[6]

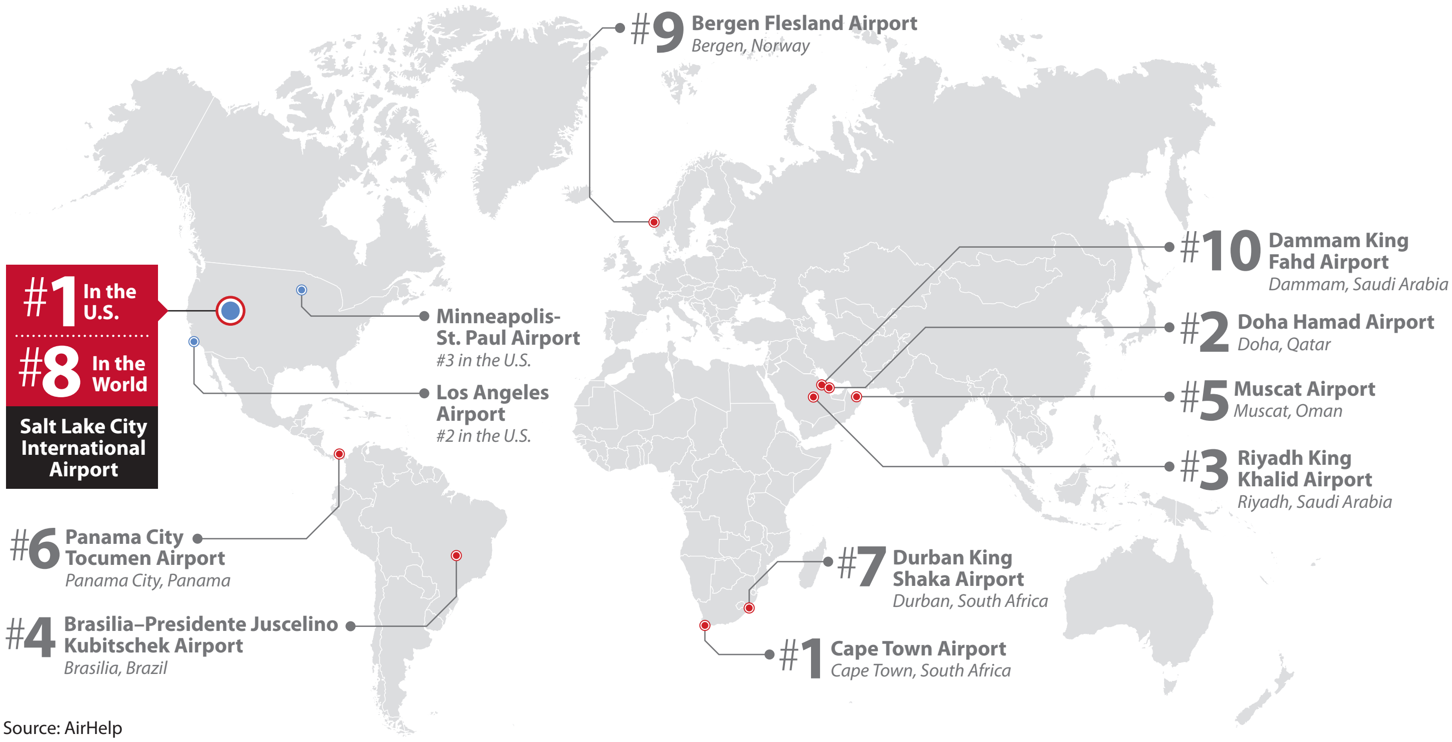
National Park Visitation

Utah's extensive system of public lands—including five national parks and 13 national places—continues to attract resident, nonresident, and international visitors year-round (Figure 16).

According to the National Park Service (NPS), visitors to Utah's national parks and places spent a record $2.0 billion in the state's economy in 2024, which is the most current data (Figure 17). This represents the third-highest level of national park-related spending in the United States, behind California and North Carolina. This spending supported an estimated 21,500 jobs, generated $957 million in labor income, and contributed $3.1 billion in total economic output.[7] Spending on lodging, restaurants, and gasoline accounted for the largest shares of national park visitor spending (Figure 18).

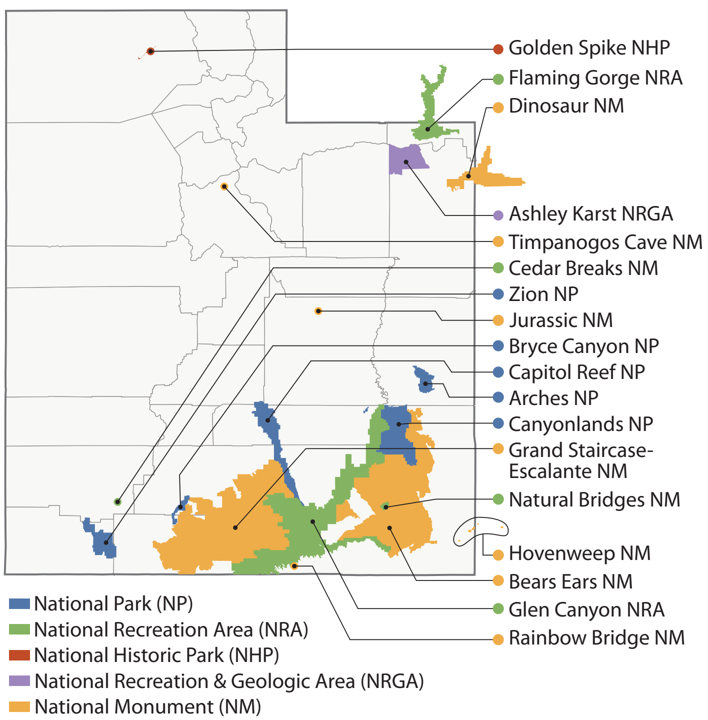
Utah's five national parks welcomed approximately 10.6 million visitors in 2025, a 4.5% year-over decline (Figure 19). Excluding 2020 due to pandemic-effects, annual visitation remained relatively stable between 10.5 million and 11.3 million visitors since 2017, which is nearly double the level recorded two decades ago (5.2 million).

Figure 15: International Airports Ranked, 2025



Source: AirHelp

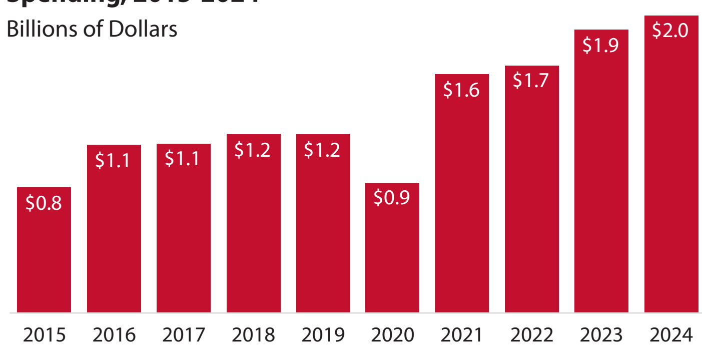
Figure 16: Utah's National Parks and Places, 2025



Source: National Park Service

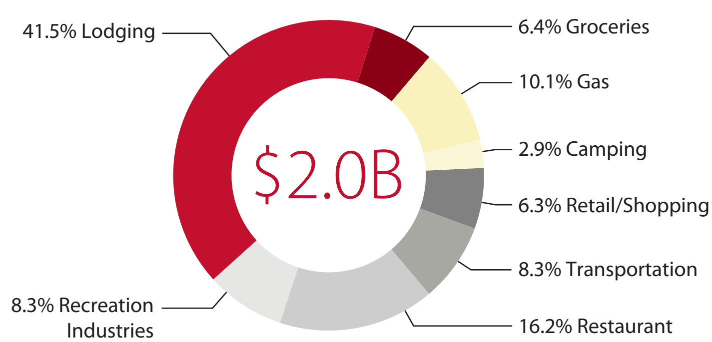
Figure 17: Utah National Parks and Places Annual Visitor Spending, 2015-2024

Billions of Dollars



Note: Includes visitor spending at national parks (Arches, Bryce Canyon, Canyonlands, Capitol Reef, and Zion) and national places (Cedar Breaks NM, Dinosaur NM, Glen Canyon NRA, Golden Spike NHS, Hovenweep NM, Natural Bridges NM, Rainbow Bridge NM, and Timpanogos NM).
Source: National Park Service

Figure 18: Utah National Parks and Places Visitor Spending by Spending Category, 2024

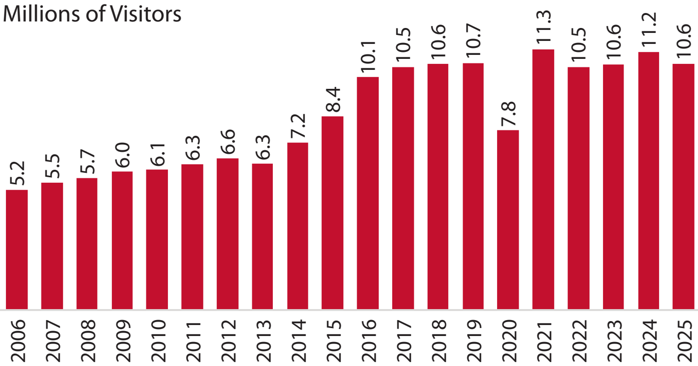


Note: Includes visitor spending at national parks (Arches, Bryce Canyon, Canyonlands, Capitol Reef, and Zion) and national places (Cedar Breaks NM, Dinosaur NM, Glen Canyon NRA, Golden Spike NHS, Hovenweep NM, Natural Bridges NM, Rainbow Bridge NM, and Timpanogos NM).
Source: National Park Service

NPS policy changes reflect an evolving approach to managing high park visitation levels. From 2022 to 2025, Arches National Park used a seasonal timed-entry reservation system during peak months (April through October) to reduce congestion.[8] For the 2026 season, however, NPS eliminated timed-entry requirements at Arches, allowing unrestricted entry during operating hours.[9]

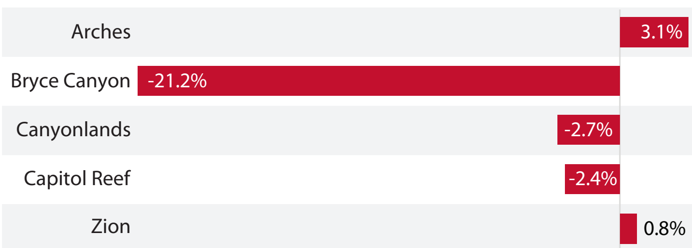
Figure 19: Utah National Park Recreation Visitation, 2006–2025

Millions of Visitors



Note: Includes Arches, Bryce Canyon, Canyonlands, Capitol Reef, and Zion National Parks.
Source: Kem C. Gardner Policy Institute analysis of National Park Service data

Figure 20: Year-Over Change in Utah's National Park Visitation, 2025



Note: Bryce Canyon revised its visitation methodology in 2025 to count unique visitors rather than total shuttle boardings, resulting in a more accurate (but lower) reported visitation total. The change in visitation would have been a 2.4% decline using the park's prior methodology, similar to Utah's other national parks.
Source: Kem C. Gardner Policy Institute analysis of National Park Service data

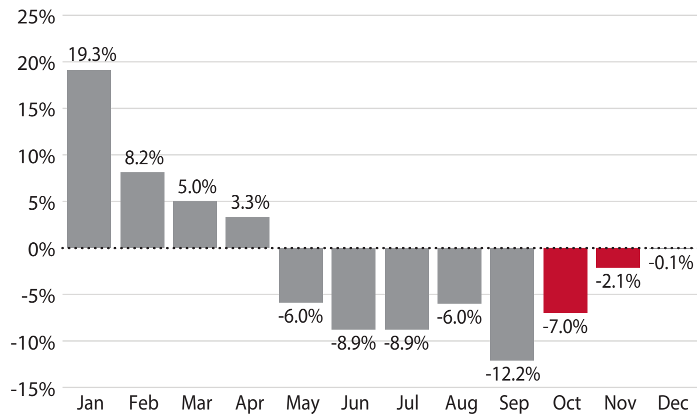
Table 3: Utah National Park Recreation Visitation by Park, 2024-2025

Millions of Visitors

Utah National Parks	2024	2025	2024-2025	Visitation Shares
Arches	1,466,528	1,511,740	3.1%	13%
Bryce Canyon	2,498,075	1,967,367	-21.2%	22%
Canyonlands	818492	796057	-2.7%	7%
Capitol Reef	1,422,490	1,388,476	-2.4%	13%
Zion	4,946,592	4,984,525	0.8%	44%
Total National Park Visitors	11,152,177	10,648,165	-4.5%	100%

Source: Kem C. Gardner Policy Institute analysis of National Park Service data

Figure 21: Year-Over Change in Utah's National Park Visitation by Month, 2025



Source: Kem C. Gardner Policy Institute analysis of National Park Service data

Zion National Park continues to rely on a hybrid visitor management approach that includes both permits and transportation controls rather than a park-wide reservation system. Zion manages high visitation through permits for high-use trails (e.g., Angels Landing, The Narrows, and The Subway) and its seasonal shuttle system, which restricts private vehicle access along Zion Canyon Scenic Drive.

Beginning June 7, 2026, NPS will prohibit large vehicles from traveling through the historic tunnel on the east end of the Zion–Mount Carmel Highway.[10] Oversized vehicles will instead be required to use alternative routes. This change aims to reduce traffic delays and improve safety by eliminating oneway traffic controls for large vehicles.

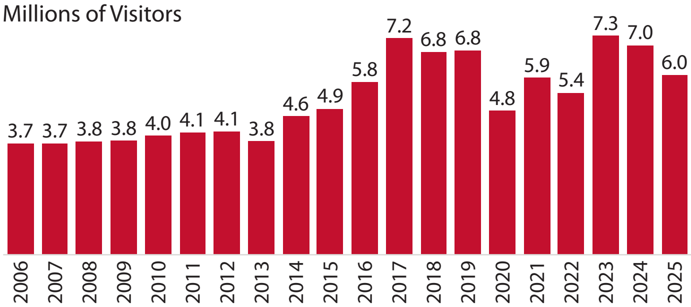
The Interior Department also introduced new national park prices for international visitors in 2026.[11] Beginning January 1, 2026, non-U.S. visitors must pay a $100 per-person entrance fee at 11 of the most-visited parks—including Utah's Bryce Canyon National Park and Zion National Park—unless they purchase the "America the Beautiful" annual pass, which will cost $250 for international visitors compared to $80 for U.S. residents (international and domestic visitors previously paid the same entrance fees). The policy is projected to generate more than $90 million annually. International visitors will also not have access to newly designated fee-free days reserved for U.S. residents, while standard entrance fees—currently collected at only a portion of National Park Service sites—will continue to support park maintenance and visitor services.[10]

Visitation trends varied across Utah's national parks in 2025 (Table 3 and Figure 20). Arches National Park recorded a 3.1% increase in visitation, while Zion National Park's visitation remained relatively flat (+0.8%). In contrast, Bryce Canyon National Park experienced the largest decline (-21.2%), followed by Canyonlands National Park (-2.7%) and Capitol Reef National Park (-2.4%). It is important to note that Bryce Canyon revised its visitation methodology in 2025 to count unique visitors rather than total shuttle boardings, resulting in a more accurate (but lower) reported visitation total.[12] The change in visitation would have been a 2.4% decline using the park's prior methodology, similar to Utah's other national parks.

The 2025 U.S. federal government shutdown impacted Utah's national parks and monuments during what is typically the parks' peak fall visitation period. During the October 1–November 12,

Figure 22: Utah National Place Recreation Visitation, 2006-2025

Millions of Visitors



Note: Ashley-Karst NRGA, Bears Ears NM, Flaming Gorge NRA, and Jurassic NM visitation data not included.
Source: Kem C. Gardner Policy Institute analysis of National Park Service and Bureau of Land Management data

Table 4: Utah National Place Recreation Visitation by Site, 2024-2025

Utah National Places	2024	2025	2024-2025	Visitation Shares
Cedar Breaks NM	722,834	718,014	-0.7%	12.0%
Dinosaur NM	322,113	315,725	-2.0%	5.3%
Glen Canyon NRA	4,725,610	3,729,502	-21.1%	62.2%
Golden Spike NHS	55,285	53,696	-2.9%	0.9%
Grand Staircase–Escalante NM	935,628	982,409	5.0%	16.4%
Hovenweep NM	31,471	26,616	-15.4%	0.4%
Natural Bridges NM	75,680	70,400	-7.0%	1.2%
Rainbow Bridge NM	17,488	11,404	-34.8%	0.2%
Timpanogos Cave NM	114,034	92,031	-19.3%	1.5%
Total National Place Visits	7,000,143	5,999,797	-14.3%	100.0%

Note: Ashley-Karst NRGA, Bears Ears NM, Flaming Gorge NRA, and Jurassic NM visitation data not included.
Source: Kem C. Gardner Policy Institute analysis of National Park Service and Bureau of Land Management data

2025 shutdown, Utah's national parks and monuments remained largely open, supported by coordinated efforts from the Utah Office of Tourism, local governments, and nonprofit partners in gateway communities.[13] NPS reportedly lost an estimated $1 million per day in revenue nationally during the shutdown.[14] Similar pressures affected Utah's parks and gateway communities, although not as much as expected. For instance, while year-over Utah national park visitation was down in October (-7.0%) and November (-2.1%), visitation was similarly down 6%-12% in the months leading up to the shutdown (Figure 21).

Visitation to Utah's national places—including monuments, historic sites, and recreation areas—declined by 14.3% in 2025 (Table 4 and Figure 22). All sites experienced year-over visitation decreases, except for Grand Staircase-Escalante National Monument. The largest declines in visitation occurred at Rainbow Bridge National Monument, Glen Canyon National Recreation Area, and Timpanogos Cave National Monument.

State Park Visitation

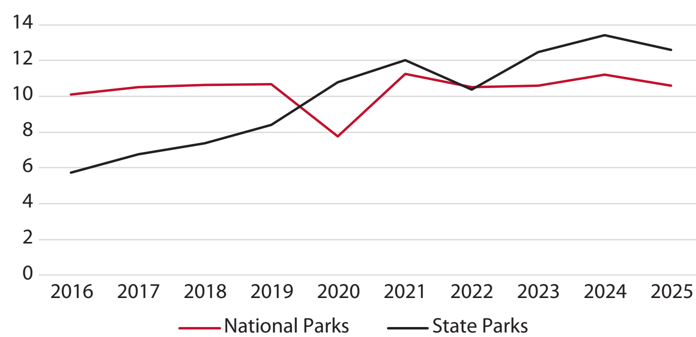
Forty-four of Utah's 46 state parks track monthly and annual visitation. These parks recorded a combined 12.2 million visitors in 2025, representing a 5.8% decline from the prior year, which saw a high of 13.0 million visitors (Table 5). Despite the overall decline, trends varied significantly across individual parks. Red Fleet experienced a substantial increase in visitation following its reopening after multi-year construction closures, and Utahraptor, which opened May 23, 2025, recorded 70,679 visitors during its first year of operation. In contrast, Territorial Statehouse, Steinaker, and Gunlock saw the largest percentage declines. Excluding Red Fleet, Palisade posted the largest gain in total visitors, while Sand Hollow recorded the largest decline.

Both state and national park visitation moderated in 2025, reflecting a possible normalization following several years of post-pandemic growth (Figure 23). Over the past decade (2016–2025), Utah's state parks experienced strong long-term expansion, with an annualized growth rate of 9.7%. This rate is significantly higher compared to the annualized growth rate of Utah's national parks over the same period.

Seasonal trends in 2025 further highlight differences between the two park systems (Figure 24). In the first quarter of 2025 (Jan-Mar), national park visitation increased 7.9%, while state

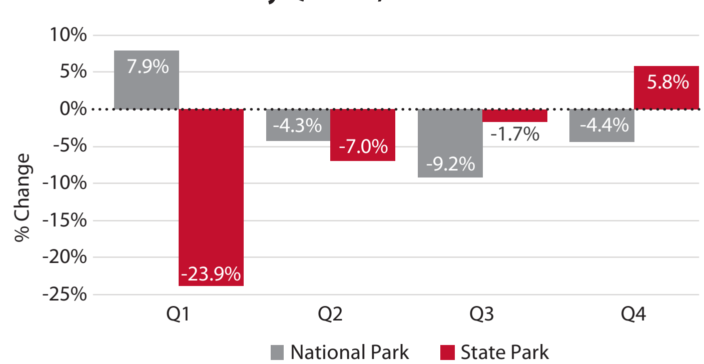
Figure 23: National Park and State Park Visitation, 2016-2025

Millions of Visitors



Source: Kem C. Gardner Policy Institute analysis of National Park Service and Utah State Parks data

Figure 24: Year-Over Change in Utah National Park and State Park Visitation by Quarter, 2025



Source: Kem C. Gardner Policy Institute analysis of National Park Service and Utah State Parks data

Table 5: Utah State Parks Visitation, 2024-2025

Utah State Park	2024	2025	2024-2025	Visitor Change
Anasazi Indian Village	787	1,201	52.6%	414
Antelope Island	1,047,499	912,091	-12.9%	-135,408
Bear Lake	665,667	650,819	-2.2%	-14,848
Camp Floyd - Stage Coach Inn	11,683	13,574	16.2%	1,891
Coral Pink Sand Dunes	307,823	328,730	6.8%	20,907
Dead Horse Point	1,140,267	1,090,799	-4.3%	-49,468
Deer Creek	702,398	663,397	-5.6%	-39,001
East Canyon	244,207	240,324	-1.6%	-3,883
Echo	131,692	113,293	-14.0%	-18,399
Edge Of The Cedars	13,301	13,578	2.1%	277
Escalante Petrified Forest	147,720	137,735	-6.8%	-9,985
Fred Hayes at Starvation	158,248	144,878	-8.4%	-13,370
Fremont Indian	46,260	38,131	-17.6%	-8,129
Frontier	14,555	12,567	-13.7%	-1,988
Goblin Valley	503,676	483,792	-3.9%	-19,884
Goosenecks	61,028	51,993	-14.8%	-9,035
Great Salt Lake Marina	268,651	304,671	13.4%	36,020
Green River	113,197	110,023	-2.8%	-3,174
Gunlock	165,979	116,889	-29.6%	-49,090
Huntington	40,850	37,608	-7.9%	-3,242
Hyrum	146,026	141,387	-3.2%	-4,639
Jordan River OHV	108,528	104,831	-3.4%	-3,697
Jordanelle	916,404	863,823	-5.7%	-52,581
Kodachrome Basin	184,139	179,182	-2.7%	-4,957
Lost Creek	25,462	20,728	-18.6%	-4,734
Millsite	26,189	19,930	-23.9%	-6,259
Otter Creek	52,522	50,843	-3.2%	-1,679
Palisade	274,715	324,887	18.3%	50,172
Piute	1,864	1,712	-8.2%	-152
Point of the Mountain Sky Park	3,837	5,941	54.8%	2,104
Quail Creek	368,835	343,954	-6.7%	-24,881
Red Fleet	6,296	87,272	1286.1%	80,976
Rockport	196,258	180,803	-7.9%	-15,455
Sand Hollow	1,530,337	1,370,202	-10.5%	-160,135
Scofield	47,550	42,321	-11.0%	-5,229
Snow Canyon	994,796	840,624	-15.5%	-154,172
Steinaker	94,449	58,004	-38.6%	-36,445
Territorial Statehouse	17,296	8,531	-50.7%	-8,765
Utah Field House Of Natural History	72,355	72,649	0.4%	294
Utah Lake	296,201	262,046	-11.5%	-34,155
Utah Raptor	25,688	70,679	175.1%	44,991
Wasatch Mountain	800,135	830,939	3.8%	30,804
Willard Bay	818,539	693,237	-15.3%	-125,302
Yuba	174,584	180,685	3.5%	6,101
Total	12,970,517	12,223,328	-5.8%	-747,189

Note: Flight Path State Recreation Area, Historic Union Pacific Rail Trail, and This is the Place Heritage Park visitation data are not included; Red Fleet was closed for construction in 2024 and Utahraptor State Park officially opened in May of 2025.
Source: Kem C. Gardner Policy Institute analysis of Utah State Parks data

park visitation declined 23.9%. In the fourth quarter (Oct-Dec), state parks posted a 5.8% increase in visitation, while national parks declined 4.4%. Both systems experienced year-over declines during the second and third quarters (Apr-Sept), reflecting mid-year softening.

Ski Industry

Utah is home to 15 ski resorts, including 10 resorts within an hour's drive of the Salt Lake City International Airport. Utah's ski industry recorded 4.8 million skier days and $2.1 billion in skier spending during the 2025/26 ski season (Figures 25 and 26). According to RRC Associates, skier days declined 26.5% compared with the prior season, while nominal skier spending (not adjusted for inflation) fell 17.8%. Year-over per capita spend per skier visit, however, was up from $350 to a record high of $392 (+12.0%). While the 2025/26 economic contributions from skier spending have not been calculated yet, the Gardner Institute estimates that $2.5 billion in skier spending in the previous season supported approximately 31,800 direct Utah jobs and generated an estimated $345 million in state and local tax revenue.[15]

The average length of stay of skiers/snowboarders decreased from 6.3 nights last season to 6.0 nights this season. As for modes of local transportation used by nonresident skiers/snowboarders, nearly half rented a vehicle, while one-in-five used a rideshare service (Figure 27).

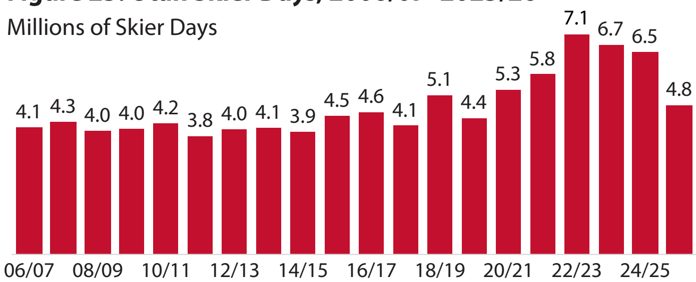
Utah residents accounted for most ski visits, while nonresident skiers primarily came from California, New York, and Florida (Figure 28). A historic low of around 85,000 international skiers visited Utah resorts in 2025/26, composing a 2% share that is down from 3% the previous season.

Utah's ski resorts continue to receive strong national recognition. *SKI* Magazine ranked seven of Utah's 15 resorts among the "Top 30" ski resorts in the Western United States in 2026, with Snowbasin, Alta, and Deer Valley ranking in the top 10 (3rd, 6th, and 9th, respectively).[16] Snowbird, Solitude, Powder Mountain, and Park City Mountain also earned spots on the Top 30 list.

Deer Valley Resort debuted the largest ski area expansion in history during the 2025/26 season.[17] The resort more than doubled its terrain from about 2,050 to 4,300 acres with the addition of former Mayflower Resort land and 10 new lifts

Figure 25: Utah Skier Days, 2006/07–2025/26

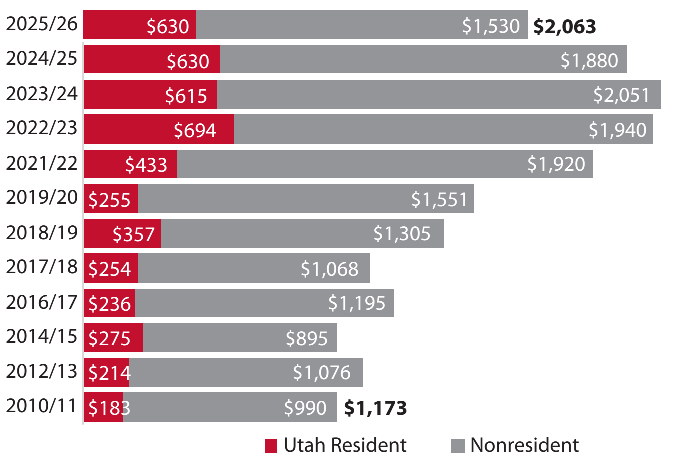
Millions of Skier Days



Source: Kem C. Gardner Policy Institute analysis of Ski Utah data

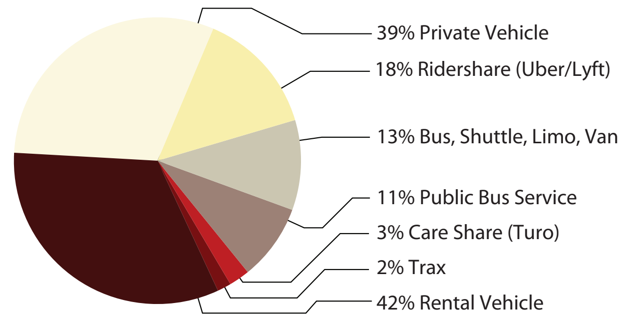
Figure 26: Utah Skier/Snowboarder Spending, 2010/11-2025/26

Millions of Dollars



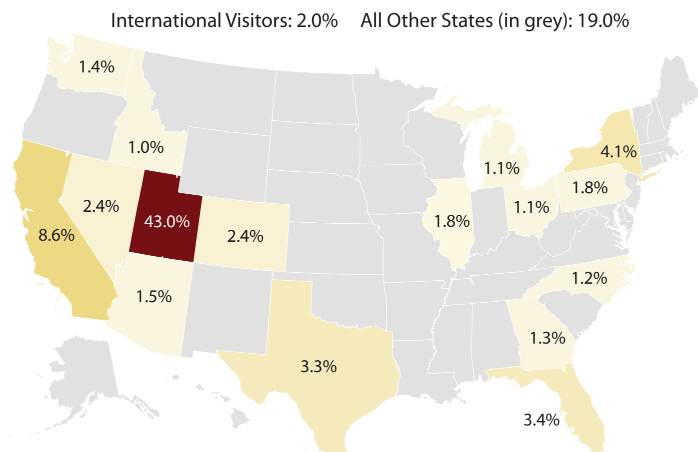
Note: Biennial RRC research changed to annual research beginning in 2016/17; research halted in 2020/21 due to COVID pandemic.
Source: RRC Associates

Figure 27: Skier/Snowboarder Local Transportation Share by Type, 2025/26



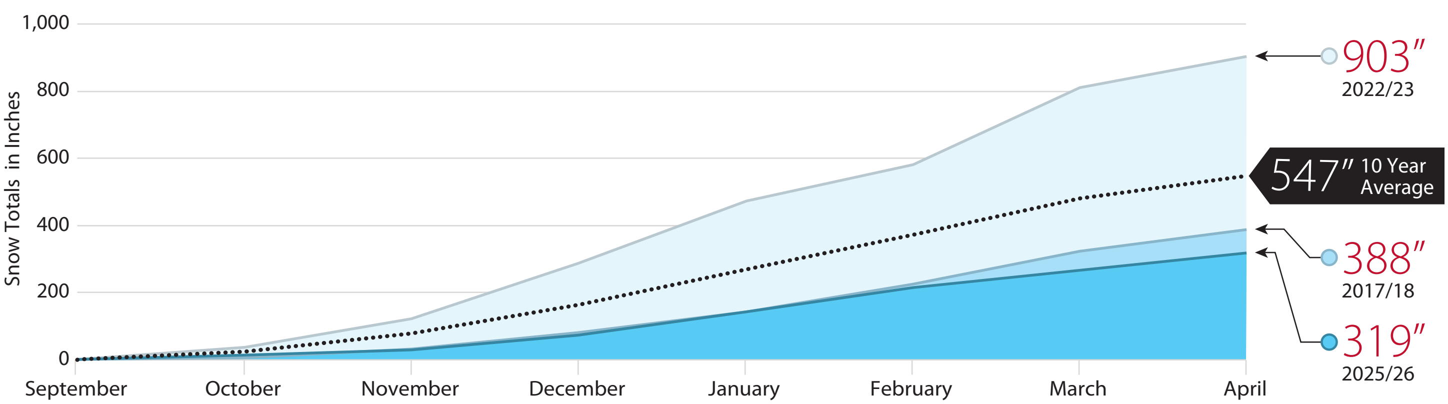
Source: RRC Associates

Figure 28: Utah Skiers/Snowboarders by Origin, Top States, 2025/26



Source: RRC Associates

Figure 29: Ski Season Snow Totals, 2016/17-2025/26



Source: Alta Ski Resort

between winter 2024 and spring 2026, including a major two-state gondola. The expansion includes Utah's longest run, Green Monster, stretching 4.85 miles with 2,600 vertical feet.

The 2025/26 ski season struggled with one of the weakest snow years in recent history (Figure 29). A warm, dry start delayed openings at several Utah resorts, limiting early-season and holiday-period activity. Statewide snowpack fell to record or near-record lows by early February following well below-average precipitation.[18] While several storm cycles in January provided temporary improvements—including healthy snowfall in the Cottonwood Canyons—conditions remained inconsistent and short-lived.[19] As a result, many resorts relied heavily on snowmaking or operated with reduced terrain, and some experienced temporary disruptions due to insufficient snowpack. Warming temperatures accelerated melt later in the season, leading to early closures and weaker spring conditions.

Urban Travel

Salt Lake City's visitor economy continued to grow in 2025. Downtown Salt Lake City hotel occupancy rates increased from 71.5% in 2024 to 72.1%, with year-over gains recorded in six months of the year (Figure 30). Average daily room rates (ADRs) rose to $176, up 2.4% from $172 in 2024, while revenue per available room (RevPAR) increased 3.5%. Salt Lake County (as opposed to Salt Lake City) also posted year-over increases in hotel occupancy rates, ADR, and RevPAR.

Three other urban counties—Davis, Utah, and Weber—generally experienced declines in many hotel performance metrics. Exceptions include an increase in occupancy rates in Weber County and growth in both hotel ADR and RevPAR in Utah County.

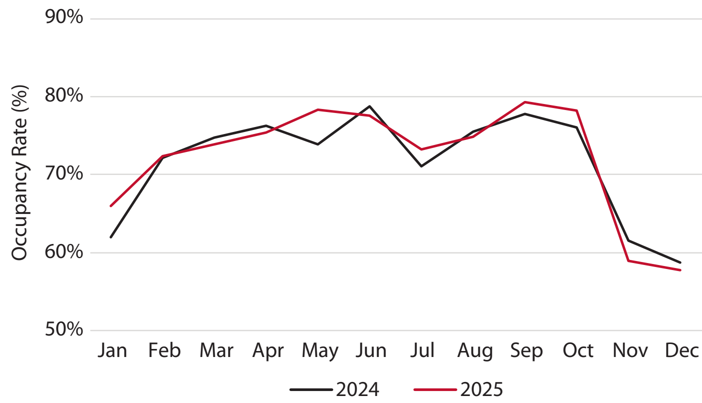
Conferences and Conventions — Visit Salt Lake's 2025 annual report indicates that the county's convention and meetings sector exceeded its annual targets. The organization secured one million room nights, surpassing its goal by 2.0%. Total attendance—including convention delegates, meeting participants, and visitors to sporting and special events—reached nearly 880,000 in 2025, a 13.4% increase from 2024. These attendees generated an estimated $522 million in economic impact for Salt Lake County.

Sporting Events — Since the launch of Sports Salt Lake in January 2021, Salt Lake City's sports tourism sector continued to expand alongside broader growth in the national sports event market. Sports Salt Lake bookings accounted for more than 30% of Visit Salt Lake's total room-night production in 2025, reflecting sustained demand from major sporting events and tournaments (Figure 31).

Special Tax Districts — On June 13, 2023, Salt Lake County established its first Convention and Tourism Assessment Area (CTAA), which is operational for five years (2023–2028). Effective October 1, 2023, hotels in three participating districts began imposing a 2.0% assessment on gross short-term guest room rental revenue. Revenue generated through the CTAA directly supports tourism development efforts by funding destination marketing, event recruitment, and regional visitor economy improvements. Since its implementation, the CTAA generated $7.8 million in 2024, $8.3 million in 2025, and is expected to see $9.5 million in 2026.[20] This funding supports both near-term visitation and long-term destination growth.

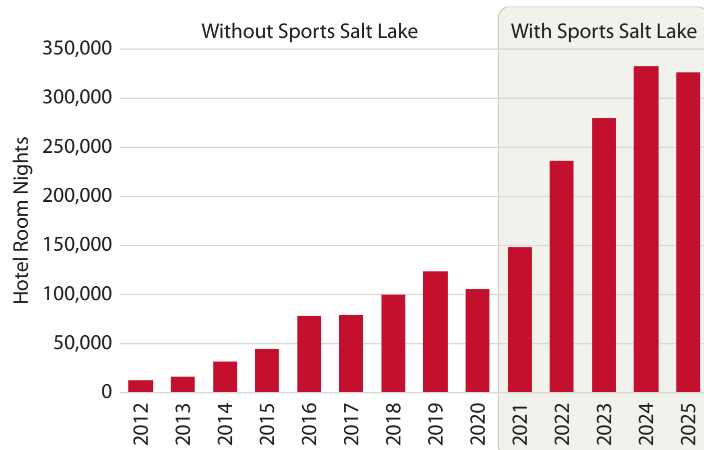
Salt Lake City also approved Smith Entertainment Group's proposal to allocate a 0.5% sales tax increase to fund the Sports, Entertainment, Culture, and Convention (SECC) District in 2024. Revenue from this fund supports revitalization of the Delta Center and historic Japantown, public art financing, affordable and family-sized housing, and workforce development.[21] On April 29, 2025, a 6.5-acre portion of the Salt Palace Convention

Figure 30: Downtown Salt Lake City Hotel Occupancy, 2024 and 2025



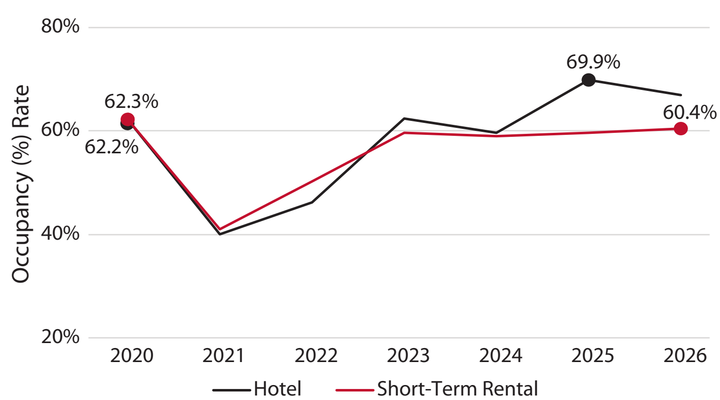
Note: Republication or other re-use of this data without the express written permission of Smith Travel Research (a CoStar Company) is strictly prohibited.
Source: Kem C. Gardner Policy Institute analysis of STR, Inc., data

Figure 31: Salt Lake Sports Market: History of Hotel Room Night Production, 2012-2025



Source: Sports Salt Lake

Figure 32: Summit County Hotel and Short Term Rental Occupancy Rates, Sundance Film Festival, 2020-2026



Note: Occupancy rates include first seven days of the film festival averaged; in January 2020, the festival took place prior to the COVID-19 pandemic. Republication or other re-use of this data without the express written permission of Smith Travel Research (a CoStar Company) is strictly prohibited.
Source: Kem C. Gardner Policy Institue analysis of Lighthouse and STR, Inc., data

Center was sold to Smith Entertainment Group for $55.4 million, a first step in advancing the vision for the SECC District surrounding the Delta Center.[22] Salt Lake County is selecting key private partners (Construction Control Corporation/RLB and MHTN/Populous) to lead critical aspects of the convention center's renovation.[23]

Sundance Film Festival

Although 2024 marked the 40th anniversary of the Sundance Film Festival in Park City, 2026 is its final year in Utah. In March 2025, the Sundance Institute announced that Boulder, Colorado, would become the festival's new host location from 2027 through 2036. While acknowledging the festival's long-standing cultural and economic importance, local leadership expressed confidence that Park City's economy remains well-positioned for continued stability. For example, Park City's mayor noted that tax revenues have continued to grow with or without the festival.[24]

According to Y2 Analytics' 2025 Sundance Film Festival Economic Impact Report, the festival attracted 85,472 attendees, with approximately 33% coming from out of state. These nonresident visitors generated an estimated $162.4 million in spending over the 10-day event. Overall, the festival supported 2,697 jobs and contributed $103.3 million in wages, $21.1 million in state and local tax revenue, and $196.1 million to Utah's GDP.

Figure 32 illustrates Sundance's influence on Summit County hotel and short-term rental occupancy from 2020 to 2026. Hotel occupancy rates during the first week of the 2020 in-person festival (pre-COVID) averaged 62.2%. Following a decline in 2021 (when the festival operated in a hybrid model), occupancy rates gradually recovered, peaking at 69.9% in 2025 before decreasing slightly in 2026. The short-term rental market followed a similar trajectory, falling from a 62.3% occupancy rate in 2020 to roughly 40% in 2021, then steadily rebounding to about 60% in the past two years.

It is important to note that this recovery occurred alongside significant inventory growth: Summit County hotel supply increased by 22.7% and short-term rental inventory by 29.4% between 2020 and 2026.

Travel and Tourism Employment

Utah's travel and tourism industry generated a record 107,500 direct jobs in 2025. The industry's economic activity supported an additional 59,700 jobs across the state through indirect and induced effects (Figure 33). Direct jobs are those created by businesses that serve visitors (e.g., hotels, restaurants, attractions, and transportation providers), indirect jobs are supported through purchases made by those tourism businesses from suppliers, and induced jobs result from household spending by employees whose incomes are supported directly or indirectly by travel and tourism.

Tourism-related industry sectors with the fastest year-over employment growth include spectator sports, performing arts, and museums/parks (Figure 34). The sectors with the largest number of absolute job gains include accommodations, spectator sports, and amusement/recreation. In contrast, the travel arrangements/reservation services, transit and ground transportation, and miscellaneous retail sectors experienced a decline of approximately 400 combined jobs.

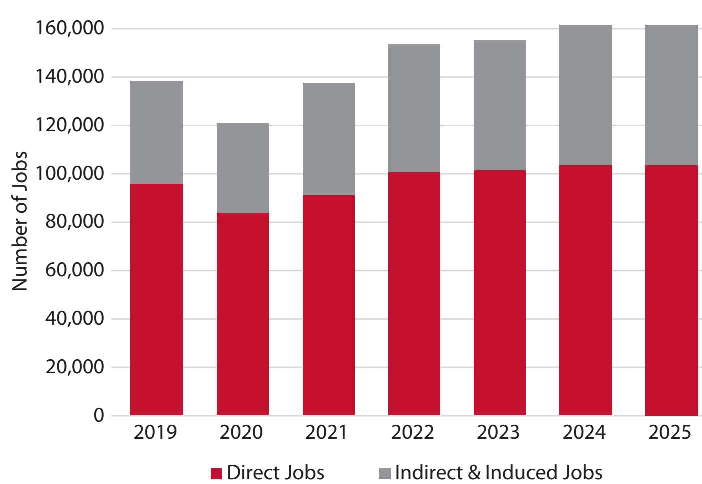
Food service and accommodations accounted for roughly one in four tourism-related jobs in 2025, while arts/entertainment/recreation accounted for about one in five (Figure 35).

At the county level, leisure and hospitality employment increased in about half of Utah's counties, remained flat in two counties, and decreased in the remaining counties in 2025 (Figure 36). San Juan, Sanpete, and Daggett experienced the greatest percent year-over job growth, while Rich, Millard, and Morgan counties had the greatest year-over percent declines in leisure and hospitality employment.

The leisure and hospitality sector touches all 29 of Utah's counties (Figure 37). Six of the top 10 counties with the largest shares of leisure and hospitality jobs are ski resort and national park gateway counties.

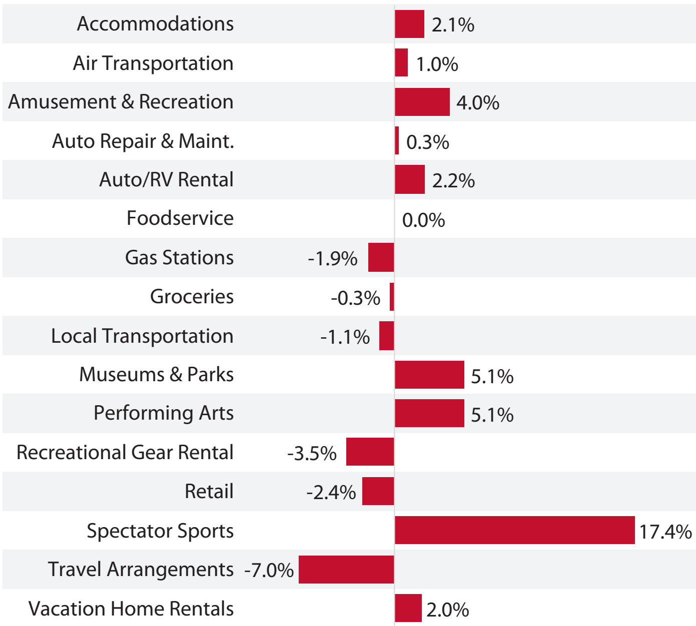
Leisure and hospitality employment grew by 1.4% from 2024 to 2025, which was close to the average growth rate of all Utah jobs combined (1.5%) (Figure 39).

Figure 33: Utah Travel and Tourism Jobs, 2019-2025



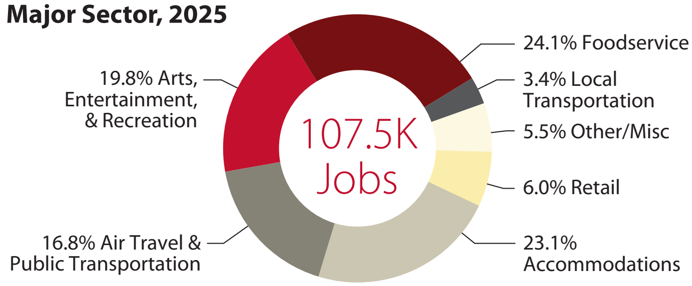
Note: Includes public and private full- and part-time jobs, and proprietors.
Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics and U.S. Bureau of Economic Analysis data

Figure 34: Year-Over Change in Tourism Jobs by Industry, 2025



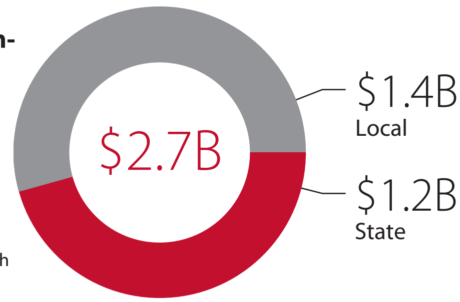
Note: Includes private full- and part-time jobs; excludes proprietors.
Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics and U.S. Bureau of Economic Analysis data

Figure 35: Travel and Tourism Employment Shares by Major Sector, 2025



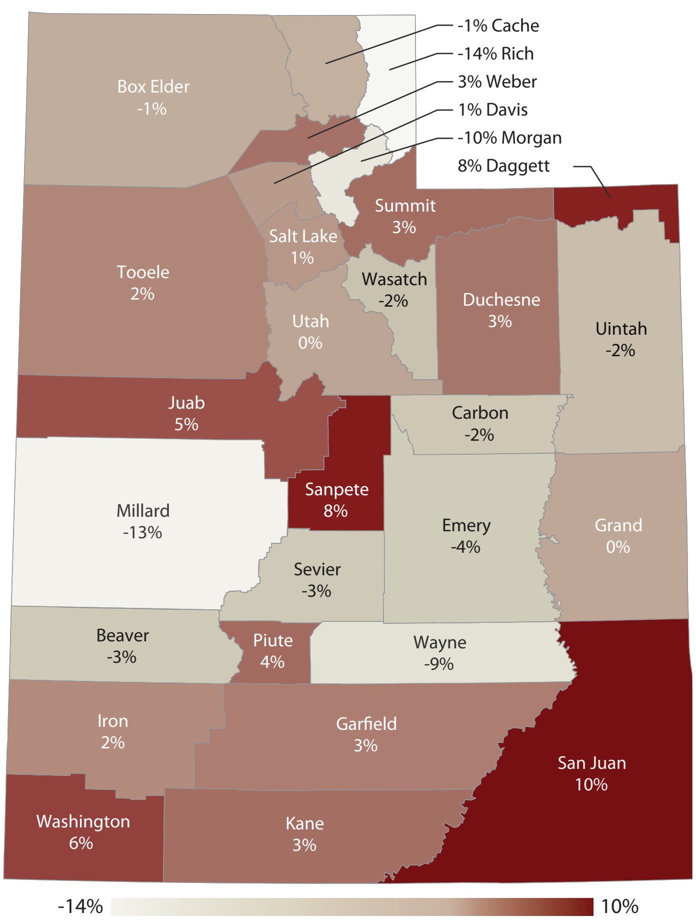
Note: Includes 103,600 direct private and public jobs and proprietors; Local Transportation sector includes car and RV rental, auto repair, and parking lots; Retail sector includes grocery stores and gas stations.
Source: Kem C. Gardner Policy Institute analysis of Bureau of Labor Statistics and Bureau of Economic Analysis data

Figure 38: Total Travel and Tourism-Generated Tax Revenue, 2025



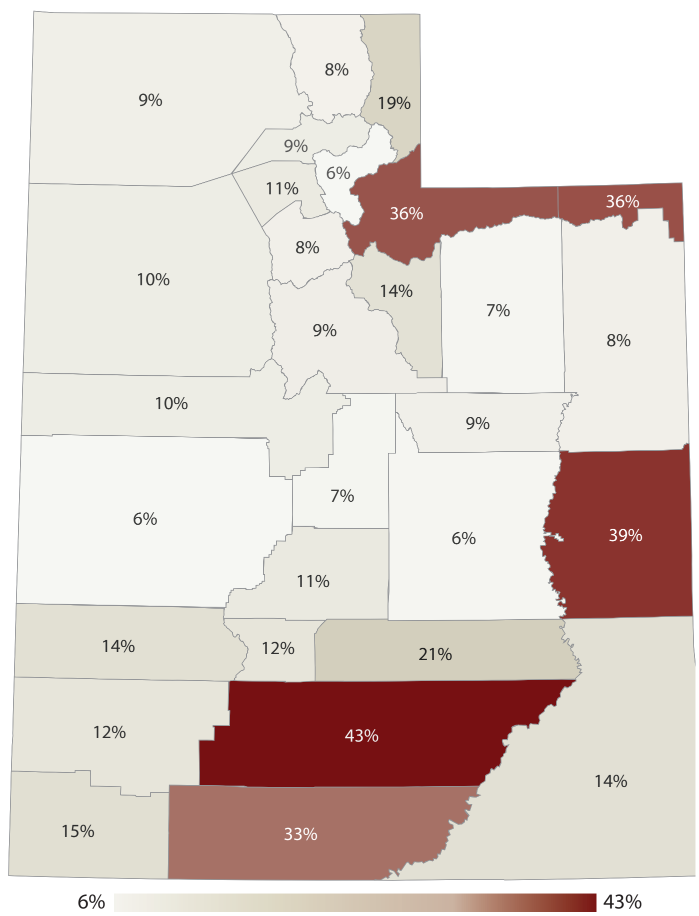
Note: Includes economic multiplier effects.
Source: Kem C. Gardner Policy Institute analysis of Tourism Economics and Utah State Tax Commission data

Figure 36: Year-Over Change in Leisure and Hospitality Jobs, 2025



Note: Includes private full- and part-time jobs; excludes proprietors.
Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics data

Figure 37: Leisure and Hospitality Sector Job Share by County, 2025



Note: Includes private full- and part-time jobs; excludes proprietors.
Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics data

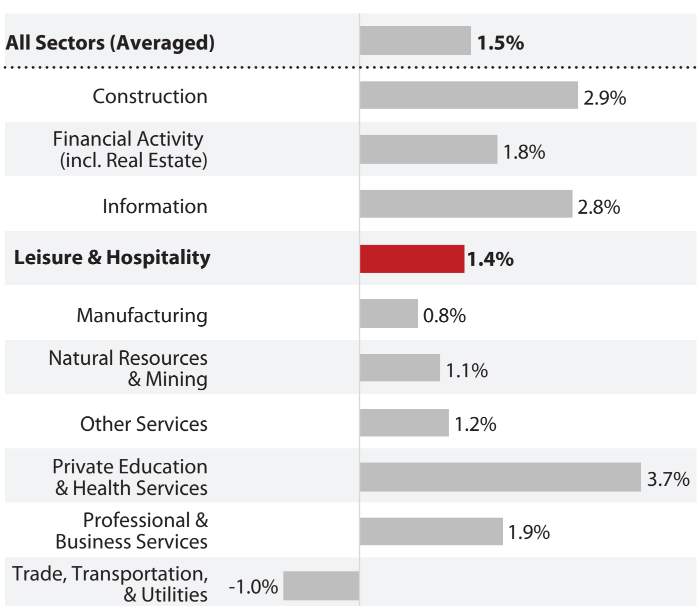
Tax Revenue

Visitors spent $13.7 billion in 2025, which generated an estimated $1.6 billion in direct state and local tax revenue and $2.7 billion in total tax revenue when including indirect and induced effects (Figure 38).

Tax revenue generated by nonresident visitor spending helps support Utah public services such as transportation, education, health and human services, and public safety.[25] A 2025 analysis by the Gardner Institute estimates that in FY2024, visitor spending accounted for approximately 10% of state sales tax and 14% of local sales tax revenue, and helped fund over 100 outdoor recreation projects through statewide transient room tax revenue. (Figure 40). Most visitor-generated revenue in FY2024 came from the Greater Salt Lake Region, while rural counties (Grand, Garfield, and Kane) had the highest visitor-generated tax revenue per household.

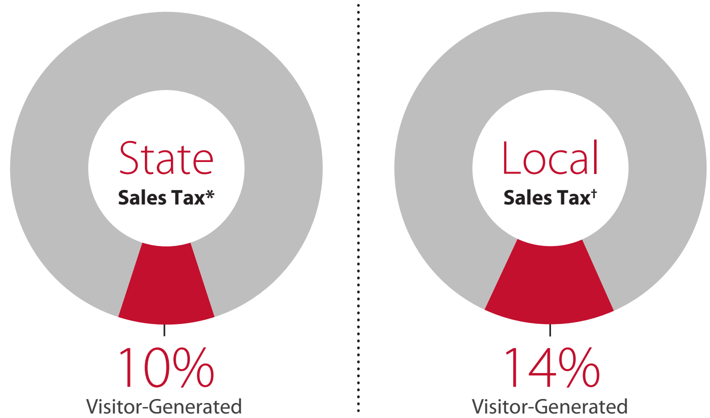
County transient room tax (TRT) grew 2.8% year-over-year, although it remained relatively flat after adjusting for inflation (+0.2%). Twenty of Utah's 29 counties recorded positive year-over nominal growth, but only 17 counties experienced real-growth in TRT (inflation-adjusted)(Figure 41). Salt Lake County, Washington County, and Utah County had the largest year-over absolute increases in county TRT. In contrast, Summit County, Davis County, and Cache County experienced the largest year-over declines.

Figure 39: Year-Over Change in Utah Employment by Major Sector, 2025



Note: Includes private full- and part-time jobs; excludes proprietors.
Source: U.S. Bureau of Labor Statistics

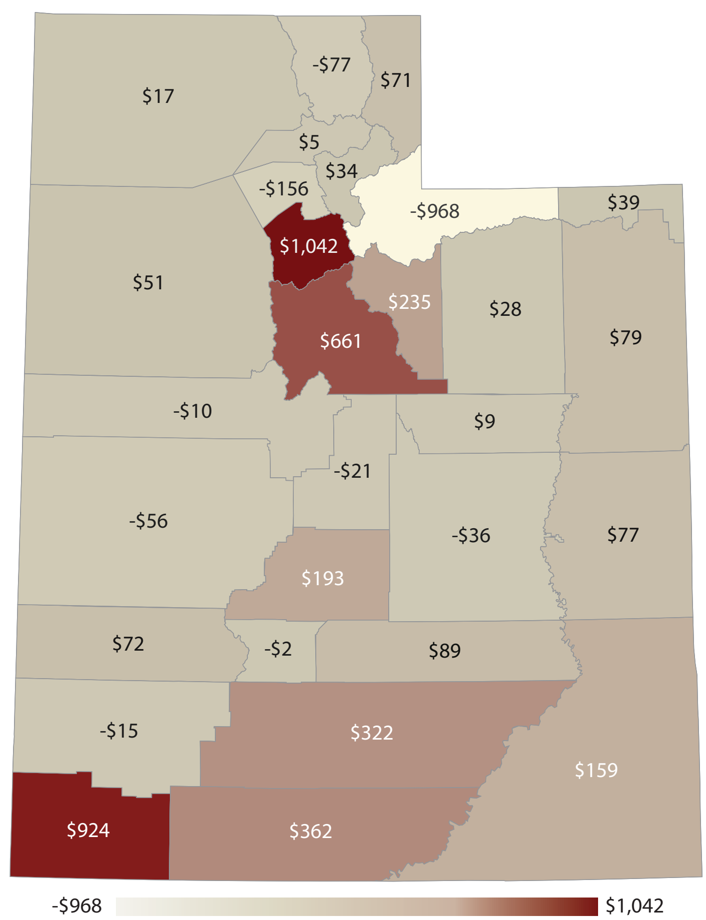
Figure 40: Visitor-Generated Tax Revenue Shares of Total Statewide Tax Revenue, FY2024



* Non-earmarked state sales tax.
† Local 9-11, Liquor, Muni Telecom, and Municipal Energy tax revenues have been omitted.
Source: Kem C. Gardner Policy Institute analysis of Tourism Economics and Utah State Tax Commission data

Figure 41: Year-Over Change in County Transient Room Tax (TRT) Revenue, 2025

Thousands of Dollars



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

Hotels and Short Term Rentals

Utah's average annual hotel occupancy rate declined 1.1 percentage points from 65.1% in 2024 to 64.0% in 2025. Occupancy peaked during the busy summer months of May, June, and August. Compared with 2019 pre-pandemic patterns, 2025 occupancy rates remained notably lower in the summer but otherwise followed a similar seasonal trajectory (Figure 42).

At the county level, Salt Lake County recorded the highest average annual occupancy rate at 69.6% in 2025, while Wasatch County recorded the lowest at 46.8%. Compared with 2024, occupancy rates declined in all but three counties (Emery, Utah, and Iron) (Figure 43). Summit and Millard/Juab counties saw the largest declines.

Average hotel daily rates (ADRs) declined 0.8% in 2025, after adjusting for inflation. Wasatch County recorded the highest ADR at $483, up from $419 in 2024, while Beaver County recorded the lowest at $104 (Figure 44). Of the 24 counties reporting ADR data, only eight experienced year-over increases (Figure 46). Wasatch County posted the largest increase, followed by Summit, Tooele, and Salt Lake counties. In absolute terms, Wasatch County also saw the largest gain, with ADR rising by $64 per night.

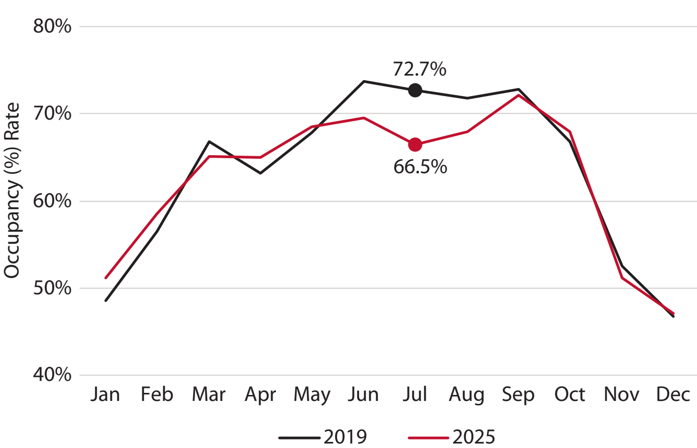
Between 2019 and 2025, Utah's hotel room inventory expanded by 11.0% statewide, with particularly strong growth in resort and recreation counties (Figure 45, Table 6). Salt Lake County added nearly 1,600 rooms, a 7.9% increase, while Wasatch, Garfield, San Juan, Kane, Grand, and Summit counties experienced increases of 20% or more. These increases reflect continued investment in high-demand tourism destinations. In contrast, Sevier, Tooele, and Weber counties saw modest declines, while Carbon County remained unchanged.

Utah's average annual number of unique short-term rental units increased from 18,595 in 2019 to 30,491 in 2025, a 64.0% increase, according to data from Lighthouse, a research firm specializing in short-term rental data (Table 6).

Growth in Utah's short-term rental units has consistently outpaced hotel room growth over the 2019–2025 period. Short-term rental inventory grew significantly in 2022 and remained elevated in 2023 before moderating in 2024 and 2025. In contrast, hotel room growth was minimal or negative throughout the period, declining slightly in 2020, followed by small increases in 2021 and growing just 1–2% annually from 2022 through 2025 (Figure 47). These data show Utah's short-term rental market rapidly expanded and subsequently normalized, while hotel room supply grew slowly and steadily over recent years.

Figure 48 shows divergent quarterly trends in occupancy rates between hotels and short-term rentals in 2025. Short-term rental occupancy rates begin with modest growth in Q1, but then decline, falling roughly 3.2% in Q2 and dropping again in Q3 before slightly improving in Q4. In contrast, hotel occupancy rates follow a more stable trajectory, remaining positive throughout the year and increasing from around 2.2% in Q1 to approximately 3.8% in Q4. This highlights a mid-year contraction in short-term rental activity relative to the prior year, while hotels experienced occupancy gains as the year progressed. These trends are consistent with broader statewide patterns in which hotel occupancy declined modestly overall, while short-term rental performance softened in line with changing demand conditions.

Figure 42: Statewide Hotel Occupancy, 2025 vs. 2019 Baseline



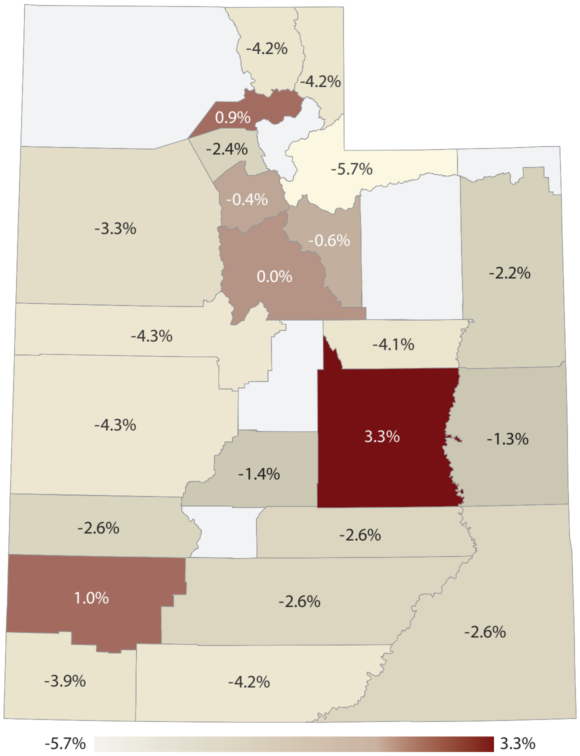
Note: Republication or other re-use of this data without the express written permission of Smith Travel Research (a CoStar Company) is strictly prohibited.
Source: Kem C. Gardner Policy Institute analysis of Smith Travel Research, Inc. data

Table 6: Hotel Room Inventory and Short Term Rental Units, 2019-2025

Year	Hotel Rooms	% Change	Short Term Rentals	% Change
2019	54,813	NA	18,595	NA
2020	54,489	-0.6%	18,767	0.9%
2021	56,514	3.7%	19,639	4.6%
2022	57,065	1.0%	23,599	20.2%
2023	58,370	2.3%	27,358	15.9%
2024	59,584	2.1%	29,681	8.5%
2025	60,881	2.2%	30,491	2.7%
2019-2025	6,068	11.1%	11,897	64.0%

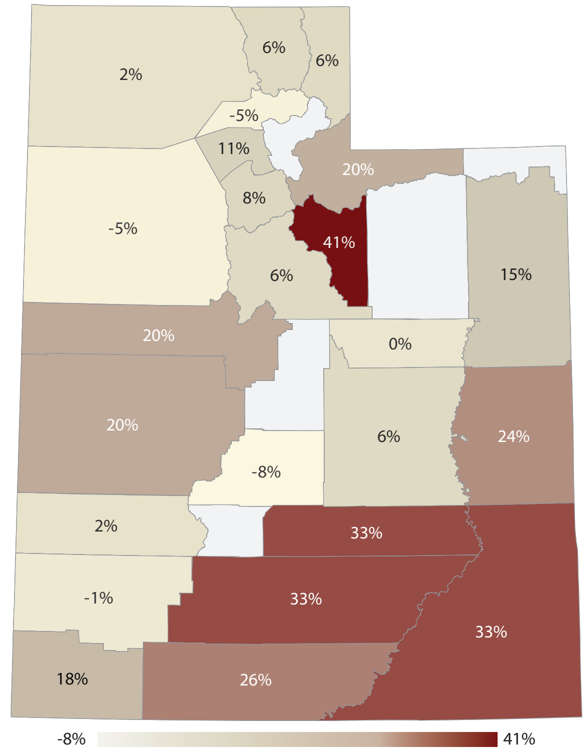
Note: Short-term Rentals include Airbnb, HomeAway, and VRBO rentals; listing type "Shared Room" has been omitted.
Source: Kem C. Gardner Policy Institute analysis of Smith Travel Research, Inc., and Lighthouse data

Figure 43: Year-Over Change in Hotel Occupancy Rate by County, 2025



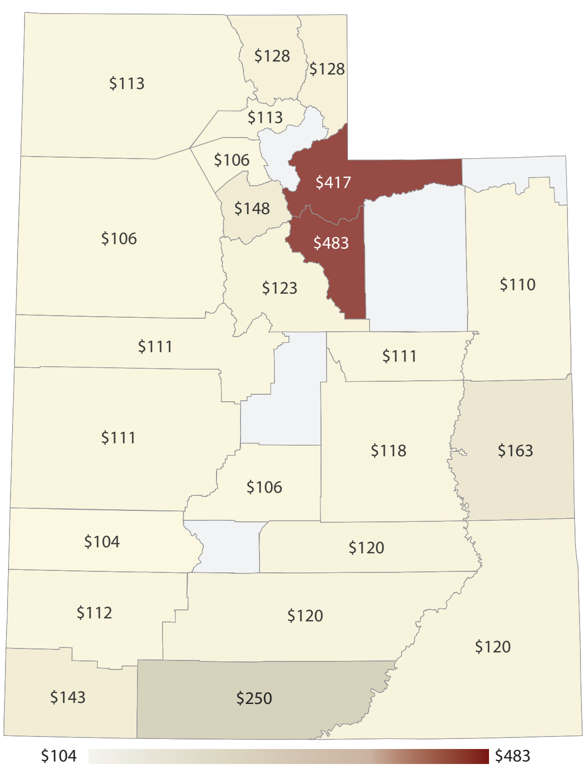
Note: no data exists for counties shaded light grey. Republication or other re-use of this data without the express written permission of Smith Travel Research (a CoStar Company) is strictly prohibited.
Source: Kem C. Gardner Policy Institute analysis of Smith Travel Research, Inc. data

Figure 45: Year-Over Change in Hotel Room Inventory by County, 2025



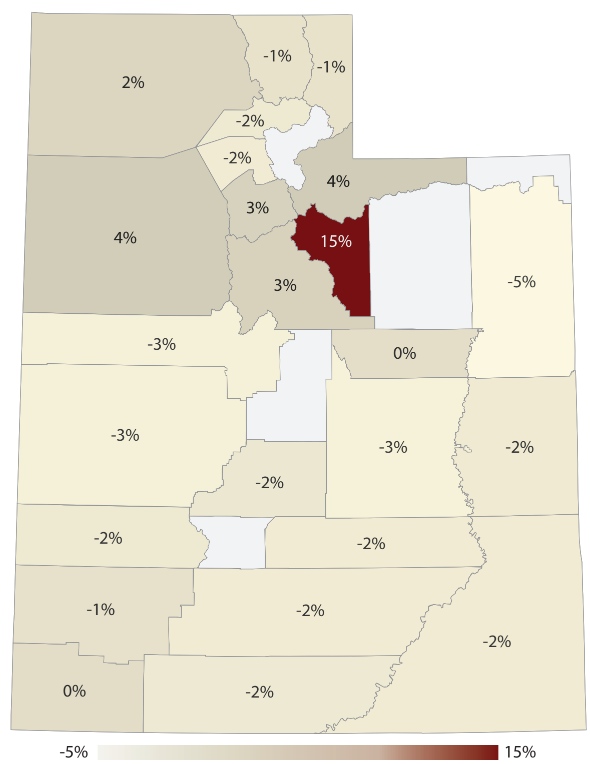
Note: no data exists for counties shaded light grey. Republication or other re-use of this data without the express written permission of Smith Travel Research (a CoStar Company) is strictly prohibited.
Source: Kem C. Gardner Policy Institute analysis of Smith Travel Research, Inc. data

Figure 44: Hotel Average Daily Room Rate (ADR) by County, 2025



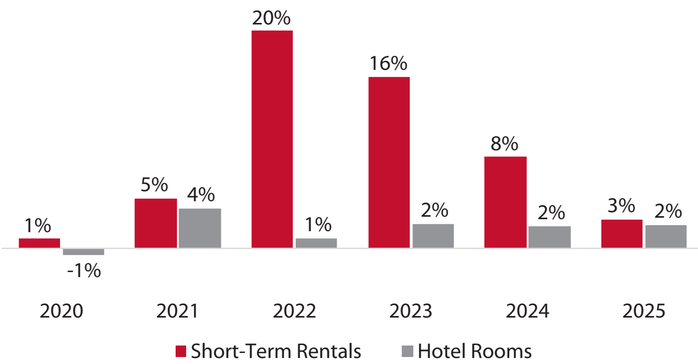
Note: no data exists for counties shaded light grey. Republication or other re-use of this data without the express written permission of Smith Travel Research (a CoStar Company) is strictly prohibited.
Source: Kem C. Gardner Policy Institute analysis of Smith Travel Research, Inc. data

Figure 46: Year-Over Change in Hotel Average Daily Room Rate (ADR) by County, 2025



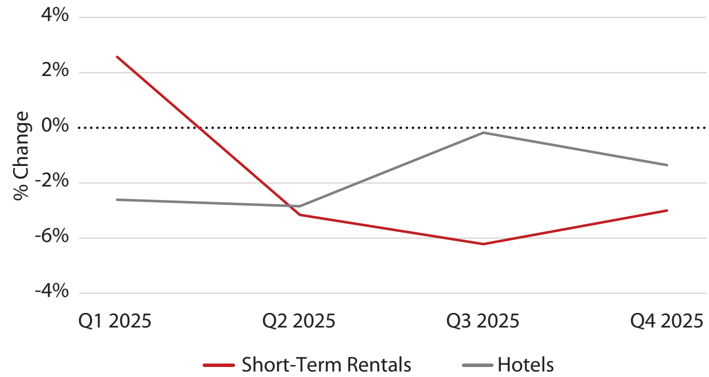
Note: no data exists for counties shaded light grey. Republication or other re-use of this data without the express written permission of Smith Travel Research (a CoStar Company) is strictly prohibited.
Source: Kem C. Gardner Policy Institute analysis of Smith Travel Research, Inc. data

Figure 47: Year-Over Change in Utah Hotel Room Inventory and Short Term Rental Units, 2019-2025



Note: Short Term Rentals include Airbnb, HomeAway, and VRBO rentals; listing type "Shared Room" has been omitted.
Source: Kem C. Gardner Policy Institute analysis of Smith Travel Research, Inc., and Lighthouse data

Figure 48: Year-Over Change in Hotel and Short Term Rental Occupancy by Quarter, 2025



Note: Includes Airbnb, HomeAway, and VRBO rentals; listing type "Shared Room" has been omitted.
Source: Kem C. Gardner Policy Institute analysis of Smith Travel Research and Lighthouse data

Travel and Tourism Industry – Other Indicators

Aside from a slight decline in airline passengers, employment, wages, and taxable sales in all major leisure and hospitality sectors grew in 2025 (Tables 7-10).

Table 7: Utah's Passenger Air Industry, 2019-2025

Year	Total Passengers	Annual Change
2019	26,808,014	5.0%
2020	12,559,026	-53.2%
2021	22,378,989	78.5%
2022	25,752,783	15.1%
2023	26,952,752	4.7%
2024	28,364,610	5.2%
2025	28,158,007	-0.7%

Year	Employment	Annual Change
2019	7,236	8.3%
2020	6,418	-11.3%
2021	7,060	10.0%
2022	8,228	16.5%
2023	9,180	11.6%
2024	9,351	1.9%
2025	9,441	1.0%

Year	Wages (Millions)	Annual Change
2019	$707	16.9%
2020	$674	-4.7%
2021	$606	-9.0%
2022	$726	19.8%
2023	$978	34.7%
2024	$1,097	12.2%
2025	$1,224	11.6%

Note: includes private full- and part-time employment; excludes proprietors.
Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics and SLC Airport data

Table 8: Utah's Arts, Entertainment, and Recreation Industry, 2024-2025

Year	2024	2025	2024-2025
Private Employment	32,268	33,837	4.9%
Private Wages ($Millions)	$1,187	$1,320	11.2%
Public Employment	8,426	8,632	2.4%
Public Wages ($Millions)	$190	$195	2.5%
Taxable Sales ($Millions)	$1,558	$1,571	0.8%

Note: includes full- and part-time employment; excludes proprietors.
Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics and Utah State Tax Commission data

Table 9: Utah's Accommodations Industry, 2024-2025

Year	2024	2025	2024-2025
Employment	23,014	23,598	2.5%
Wages (Millions)	$857	$915	6.8%
Taxable Sales (Millions)	$3,513	$3,572	1.7%

Note: includes private full- and part-time employment; excludes proprietors.
Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics and Utah State Tax Commission data

Table 10: Utah's Food Services Industry, 2024-2025

Year	2024	2025	2024-2025
Employment	120,486	120,766	0.2%
Wages (Millions)	$2,819	$2,909	3.2%
Taxable Sales (Millions)	$8,205	$8,543	4.1%

Note: includes private full- and part-time employment; excludes proprietors.
Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics and Utah State Tax Commission data

Travel and Tourism – In the News

2034 Olympics Preparation

Utah is preparing to host the 2034 Winter Olympic Games, with strong support from state leaders and local communities who view the Games as both a unifying force and a source of pride—especially given over 30% of U.S. Winter Olympians have ties to the state.[26] Early preparation efforts include school-based initiatives promoting Olympic values across urban and rural districts, as well as sending a large delegation to study the 2026 Winter Olympics in Italy to gather key insights on transportation, climate preparedness, athlete experience, and event logistics.[27] Games planners are also working to secure roughly $4 billion in funding—largely through private sources like sponsorships, broadcasting, and ticket sales—while early donations help support initial planning. These efforts highlight Utah's commitment to delivering well-executed Games that make a positive impression globally.

2034 Olympics Research Center

The University of Utah is moving to establish a new Olympic-focused research center as part of its broader efforts to expand its global academic influence ahead of the 2034 Winter Olympic Games.[28] Building on Salt Lake City's legacy from the 2002 Winter Olympics, the proposed center would study the economic, environmental, and social impacts of hosting large-scale sporting events while positioning the university to gain official recognition from the International Olympic Committee. If approved, the center would join a small but growing network of U.S.-based Olympic research centers. Faculty have expressed support while also encouraging broader research into areas like athlete mental health and community impacts. These efforts reflect the university's aim to play a central role in both the academic and operational dimensions of the upcoming Games.

Dark Sky Tourism/Astrotourism

Utah continues to lead the nation in dark sky preservation with 26 certified International Dark Sky Places, which is the highest concentration in the world.[29] On June 24, 2025, Bluff, Utah officially earned certification as an International Dark Sky Community, reflecting its commitment to protecting natural night skies. This recognition is part of broader statewide efforts to encourage travelers to plan visits that protect the surrounding natural environment, especially in destinations like Goblin Valley and Dead Horse Point. Communities such as Moab and Castle Valley are also reinforcing Utah's position as a global leader in astrotourism.

MICHELIN Guide Expands to Utah

The *MICHELIN Guide Southwest* included Utah's Wasatch region—including Visit Salt Lake, Visit Park City, and Sundance Mountain Resort—in its newest edition alongside Arizona, Nevada, and New Mexico. This is a major milestone recognizing the area's rapidly growing culinary scene.[30] The guide will debut its first rankings in 2026, with anonymous inspectors already evaluating restaurants for distinctions like Michelin Stars and Bib Gourmand awards. Local leaders see the announcement as global validation of the region's food culture, creativity, and hospitality, bringing increased visibility to chefs and restaurants across the Wasatch Front and Back.

Rail Tourism - Canyon Spirit

Rail travel is gaining traction as a unique way to experience Utah. Beginning in 2026, the Canyon Spirit—a luxury, glass-dome rail experience—will offer a 350-mile, three-day journey through the American Southwest, connecting Denver, Moab, and Salt Lake City.[31] Large panoramic windows allow passengers to view some of the most dramatic landscapes in the country. More traditional rail experiences continue to be popular in Utah as well, like the Heber Valley Railway through Provo Canyon, which transforms into a Polar Express–themed experience during the winter season.

Responsible Tourism

Utah is helping to advance a growing responsible tourism movement alongside destinations like Colorado, New Hampshire, Jackson Hole, and Santa Monica.[32] Responsible tourism encourages travel, minimizes environmental harm, respects local cultures, and directly benefits the destination communities. Utah plans to support this effort through expanded education, targeted initiatives, and deeper local engagement. The goal is to ensure tourism continues to thrive without compromising the places people come to experience.

Utah Film Trail

Launched in Spring 2025, the Utah Film Trail highlights the state's long-standing role in the film industry. Utah's landscapes shaped some of Hollywood's most recognizable scenes, and this initiative invites visitors to experience those locations firsthand by following a series of physical markers across the state.[33]

Travel and Tourism - Potential Costs

While this report emphasizes the economic benefits of travel and tourism, it is also important to recognize the associated costs and impacts. Increased visitation can contribute to environmental degradation, higher automobile and pedestrian traffic, and elevated levels of air, water, light, and noise pollution, all of which can negatively affect natural habitats, wildlife, and local ecosystems. In high-demand destinations, overcrowding may also strain infrastructure, resulting in traffic congestion, housing affordability and accessibility issues, pressure on public services, and increased demand on waste management and emergency response systems. These challenges can be mitigated through strategic planning and effective visitor management, which help support sustainable resource use, reduce strain on local infrastructure, minimize environmental impacts, and maximize long-term economic benefits for communities.

Research Methods

This section details the Gardner Institute's analysis. The Gardner Institute defines key terms for conceptual clarity and explains the economic impact and tax revenue modeling used in this report.

Terms

- ***Employment*** – 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 sector jobs and self-employment, unless noted otherwise. An industry is a category for grouping similar types of companies. For uniformity, government agencies and researchers in the United States 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. The travel and tourism industry is not a single industry but rather an assortment of industries, comprising goods and services purchased before, during, and even after a trip.
- ***Leisure and Hospitality Employment*** – Per the U.S. Bureau of Labor Statistics, the leisure and hospitality employment sector comprises the arts, entertainment, recreation, accommodation, and food service 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 industries (e.g., transportation, real estate, rental and leasing, retail, personal services, etc.).
- ***Traveler Types*** – Utah visitors fall into two categories: residents and nonresidents. Resident travelers are Utahns who travel at least 50 miles from home (one-way) for work or leisure 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 United States.

Modeling Economic and Fiscal Impacts

Total economic impacts include direct, indirect, and induced impacts. Direct effects occur when Utah visitors purchase from Utah businesses, including purchases that support employees and their earnings. These businesses purchase inputs from local companies, which may in turn purchase from other local businesses. These rounds of activity produce indirect effects on employment and earnings. Then, direct and indirect employees spend some of their earnings in the local economy, spurring additional "induced" effects. A direct spending example in the tourism industry 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 and linen company employees spending their paychecks in the local community on rent, groceries, health care, and other goods and services.

Tourism Economics provided the Utah Office of Tourism with direct visitor spending numbers. The Gardner Institute customized a travel and tourism economic impact model for Utah to estimate this direct activity's indirect and induced impacts. This "customized" model utilizes 2026 IMPLAN economic impact software and U.S. Bureau of Labor Statistics and U.S. Bureau of Economic Analysis data.

The Gardner Institute utilizes IMPLAN economic modeling software and a customized Gardner Institute fiscal impacts calculator to estimate tax revenue impacts. The Gardner Institute's fiscal calculator uses effective tax rates and Utah State Tax Commission data to estimate the tax revenue 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). 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 assumes that federal spending in the state is largely independent of economic activity in Utah's industries, including travel- and tourism–related industries.

Endnotes

1. Visa card spending includes Visa credit and debit cards; spending by visitors from U.S. territories, including Guam, Northern Mariana Islands, Puerto Rico, and U.S. Virgin Islands, is not included.

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