

**Jennifer Leaver**  
Senior Research Analyst

# 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**



# The State of Utah's Travel and Tourism Industry, 2024

## Analysis in Brief

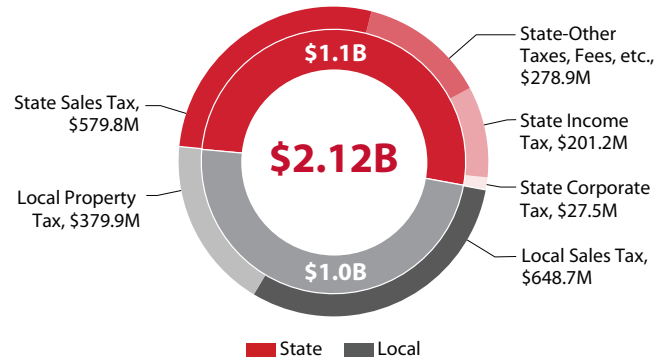
Utah's travel and tourism industry is a key contributor to the state's economy, fostering job creation, supporting local businesses, and generating tax revenue. The industry consists of private and public entities that promote leisure and business travel and provide tourism-related goods and services. 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.
- **Airport Travel** – Utah's Salt Lake City International Airport reported a record 26.9 million passengers in 2023.

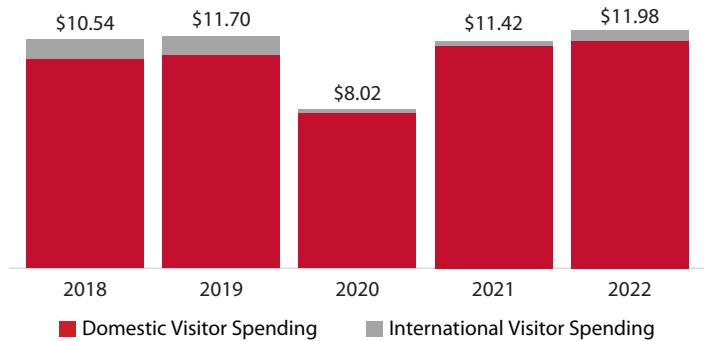
### Travel and Tourism-Generated Tax Revenue by Tax Type, 2022



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

### Direct Visitor Spending, 2018–2022

(Billions of 2022 dollars)



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

- **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.

# Table of Contents

- Introduction** ..... 3
- Overview and Outlook** ..... 3
  - Overview..... 3
  - Outlook ..... 4
- Spending & Visitation** ..... 4
  - SLC International Airport and Air Travel..... 7
  - Park Visitation ..... 7
  - Ski Industry ..... 9
- Conferences & Conventions** ..... 11
  - Sundance Film Festival ..... 11
- Travel & Tourism Employment** ..... 12
- Tax Revenue** ..... 14
- Hotel Occupancy & Rates** ..... 15
- Additional Travel & Tourism Topics** ..... 17
- Research Methods** ..... 18
  - Terms ..... 18
  - Modeling Economic and Fiscal Impacts..... 19
- References** ..... 20

## Figures

- Figure 1: Year-over Change in U.S. vs. Utah Travel Indicators, 2022 ..... 4
- Figure 2: Direct Visitor Spending, 2018-2022 ..... 4
- Figure 3: Visitor Spending by Visitor Type, 2019-2022 ..... 4
- Figure 4: Direct Visitor Spending by Visitor Type, 2022 ..... 4
- Figure 5: Direct Visitor Spending Shares by Category, 2022 ..... 4
- Figure 6: “Drinking Places-Alcoholic Beverages” Taxable Sales as Share of Total Food Service Sector Taxable Sales, 2003-2022 ... 5
- Figure 7: Year-over Change in Leisure & Hospitality Taxable Sales by County, 2022 ..... 5
- Figure 8: Share of Domestic Visitors by State, 2022 ..... 6
- Figure 9: Share of International Visitors by Country, 2022..... 6
- Figure 10: Change in International Visitor Spending in Utah by Country, 2021-2022 ..... 6
- Figure 11: International Visitor Spending in Utah, 2007-2023(f)... 6
- Figure 12: Shares of International Spending in Utah by Continent, 2007-2023(f)..... 6
- Figure 13: Salt Lake City International Airport Total Passengers, 2019-2023 ..... 7
- Figure 14: SLC International Airport Seats Per Departure, 2014-2023 ..... 7
- Figure 15: Utah National Park Annual Visitor Spending, 2014-2022..... 7
- Figure 16: Utah National Park Visitor Spending by Spending Category, 2022..... 7
- Figure 17: Utah National Park Recreation Visitation, 2004–2023... 8
- Figure 18: Utah National Place Recreation Visitation, 2005-2023 .. 8
- Figure 19: Total Visitation by Utah National Park, National Place, and State Park, 2014-2023..... 9
- Figure 20: Utah Snowfall and Skier Days, 2004/05 through 2022/23 Ski Seasons..... 10
- Figure 21: Utah Skier Days, 2002/03 through 2022/23 Ski Seasons ..... 10
- Figure 22: Utah Skier/Snowboarder Spending, 2012/11 through 2022/23 Ski Seasons ..... 10

- Figure 23: Skier/Snowboarder Accommodations Share by Lodging Type, 2022/23 Ski Season ..... 10
- Figure 24: Private Recreation-Related Jobs in Salt Lake and Summit Counties, Winter 2019-2023 ..... 10
- Figure 25: Downtown Salt Lake City Hotel Occupancy, 2021 and 2022 vs. 2019 Baseline..... 11
- Figure 26: Salt Lake Sports Market: Hotel Room Night Production, 2012-2023 ..... 11
- Figure 27: Summit County Hotel & Short Term Rental Occupancy Rates during the Sundance Film Festival, 2020-2023..... 12
- Figure 28: Utah Travel and Tourism Jobs, 2018-2022..... 12
- Figure 29: Year-over Change in Utah’s Direct Travel & Tourism Jobs by Job Type, 2022..... 13
- Figure 30: Year-over Change in Private Leisure & Hospitality Jobs by County, 2022..... 13
- Figure 31: Private Leisure & Hospitality Job Share of Total Private Jobs by County, 2022 ..... 13
- Figure 32: Total Travel and Tourism-Generated Tax Revenue, 2022 ..... 14
- Figure 33: Year-over Change in County Transient Room Tax Revenue by County, 2023 ..... 14
- Figure 34: Transient Room Tax Revenue Per Household by County, 2022 ..... 14
- Figure 35: Statewide Hotel Occupancy, 2022 and 2023 vs. 2019 Baseline ..... 15
- Figure 36: Average Daily Room Rate (ADR) by County, 2023 ..... 15
- Figure 37: Year-over Change in ADR by County, 2023..... 15
- Figure 38: Utah’s Short-Term Rental Supply, 2019-2023..... 16
- Figure 39: Short Term Rental Share of Total Housing Units by County, 2022 ..... 16
- Figure 40: Year-over Change in Number of Short Term Rental Listings by County, 2023..... 16
- Figure 41: Year-Over Change in Statewide Hotel and Short Term Rental Occupancy Rates by Quarter, 2023 ..... 17
- Figure 42: Short Term Rental Owner Distribution, 2023..... 17
- Figure 43: Occupancy Rates in Annular Eclipse Pathway Counties (Second Weekend in October), 2018-2022 Average vs. 2023 ..... 18

## Tables

- Table 1: Leisure and Hospitality Taxable Sales by Industry, 2021-2022 ..... 5
- Table 2: Utah National Park Recreation Visitation by Park, 2022-2023 ..... 8
- Table 3: Utah National Place Recreation Visitation by Site, 2021-2022 ..... 8
- Table 4: Total Visitation by Utah State Park, 2022-2023 ..... 9
- Table 5: Utah’s Top Ten Industry Sectors by Average Annual Number of Jobs, 2022..... 12
- Table 6: Utah’s Top Ten Direct, Indirect, and Induced Tourism Jobs by Sector, 2022 ..... 12
- Table 7: Utah’s Passenger Air Industry, 2018-2022 ..... 17
- Table 8: Utah’s Arts, Entertainment, and Recreation Industry, 2021-2022 ..... 17
- Table 9: Utah’s Accommodations Industry, 2021-2022..... 17
- Table 10: Utah’s Food Services Industry, 2021-2022 ..... 17

## 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.

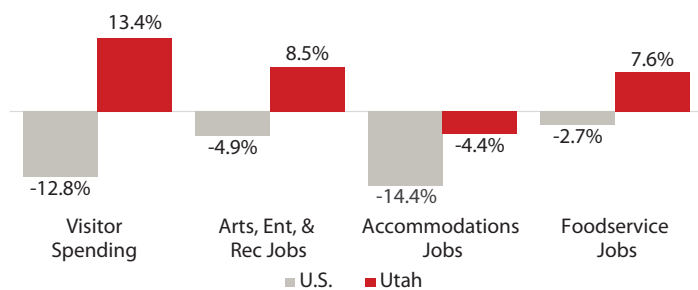
While the 2024 travel and tourism forecast shows promising growth in various sectors, it is important to consider that global economic uncertainties such as inflationary trends, shifting economic policies, geopolitical tensions, international market volatility, and the re-initiation of student loan payments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

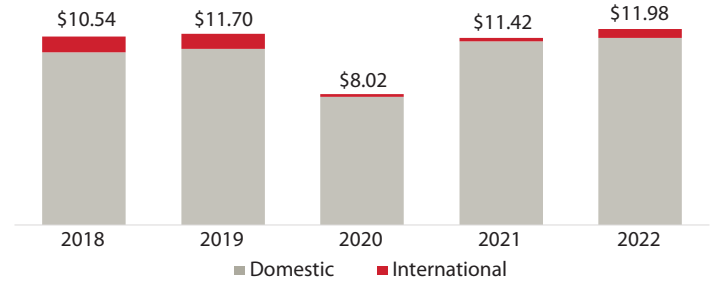
Tourism Economics (TE) reports that visitors directly spent \$11.98 billion in Utah's economy in 2022, which constitutes a 4.8% year-over increase after adjusting for inflation (Figure 2). Domestic visitors contributed 95.6% and international visitors 4.4% of this total spending, which was around half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

**Figure 1: Year-over Change in U.S. vs. Utah Travel Indicators, 2022**



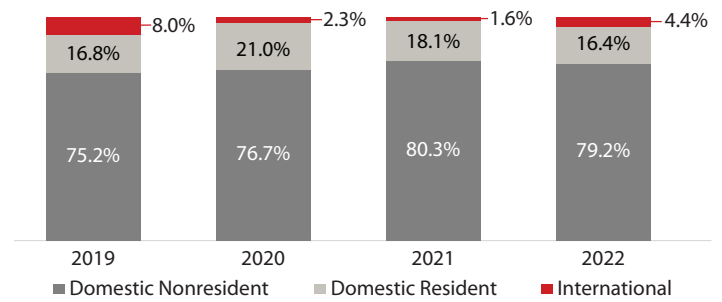
Source: Kem C. Gardner Policy Institute analysis of Tourism Economics, U.S. Travel Association and U.S. Bureau of Labor Statistics data

**Figure 2: Direct Visitor Spending, 2018-2022**  
(Billions of 2022 Dollars)



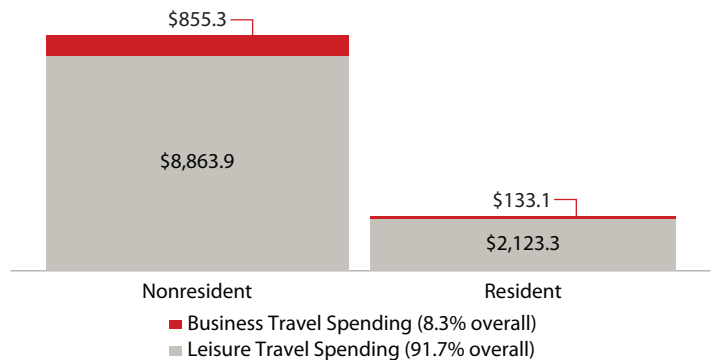
Note: Includes resident, domestic nonresident, and international visitor spending.  
Source: Tourism Economics

**Figure 3: Visitor Spending by Visitor Type, 2019-2022**



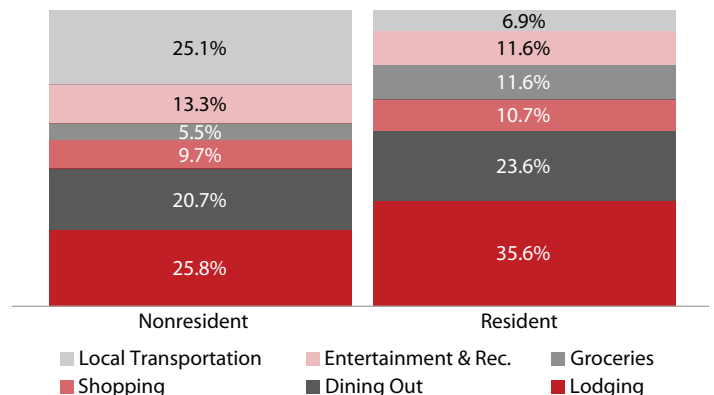
Source: Kem C. Gardner Policy Institute analysis of Tourism Economics data

**Figure 4: Direct Visitor Spending by Visitor Type, 2022**  
(Millions of Dollars)



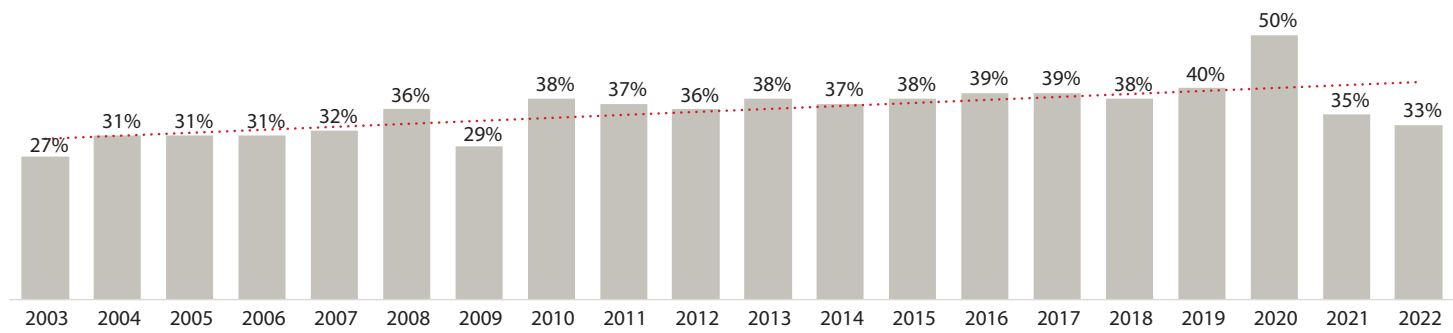
Source: Tourism Economics

**Figure 5: Direct Visitor Spending Shares by Category, 2022**



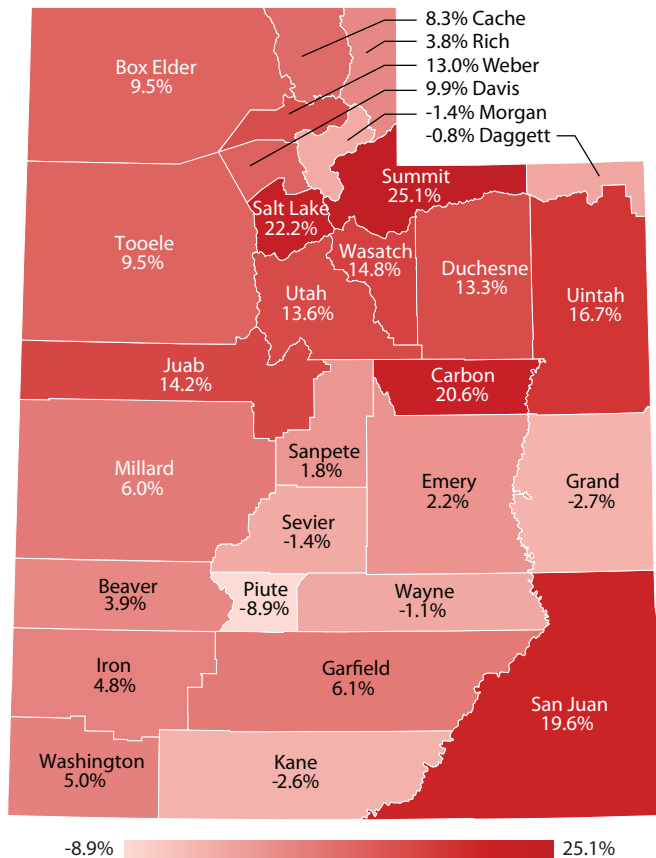
Note: Air travel spending has been removed.  
Source: Kem C. Gardner Policy Institute analysis of Tourism Economics data

**Figure 6: “Drinking Places-Alcoholic Beverages” Taxable Sales as Share of Total Food Service Sector Taxable Sales, 2003-2022**



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

**Figure 7: Year-over Change in Leisure & Hospitality Taxable Sales by County, 2022**



Source: Kem C. Gardner Policy Institute analysis of Utah State Tax Commission 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, groceries, and local transportation. Visitor spending on lodging experienced the greatest year-over increase (17.6%), followed by air travel (15.5%) and local transportation (14.9%).

**Table 1: Leisure and Hospitality Taxable Sales by Industry, 2021-2022**

Industry	2021	2022	2021-2022 Change
Performing Arts, Spectator Sports, Related	\$120.2	\$212.7	77.0%
Museums, Historical Sites, Zoos, Parks, Similar	\$71.3	\$82.0	15.0%
Amusement & Recreation	\$908.7	\$1,048.8	15.4%
Hotels, Motels, B&Bs, Resorts, Other	\$2,538.6	\$3,044.3	19.9%
RV Parks, Camps	\$77.9	\$82.5	5.9%
Restaurants & Other Eating Places	\$5,785.3	\$6,505.5	12.4%
Special Food Services, Food Carts	\$562.3	\$622.9	10.8%
Drinking Places (alcoholic beverages)	\$185.0	\$223.1	20.6%
Total	\$10,249.3	\$11,821.8	15.3%

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

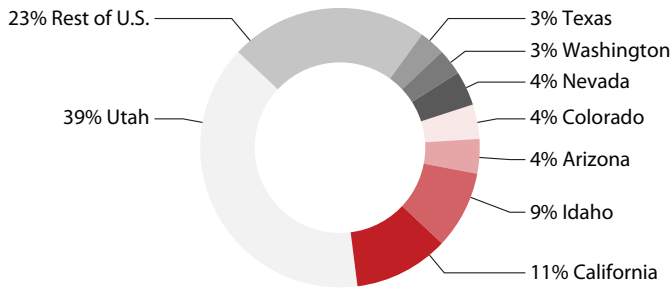
Taxable sales in Utah’s leisure and hospitality sector experienced a 15.3% year-over increase (Table 1). The sectors with the greatest year-over change were performing arts and spectator sports (77.0%), followed by sales in drinking places (20.6%) and paid accommodations (19.9%). The proportion of sales 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).

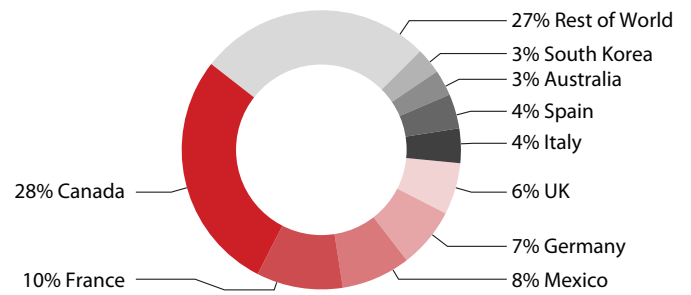


**Figure 8: Share of Domestic Visitors by State, 2022**



Source: OmniTrak Group Inc.

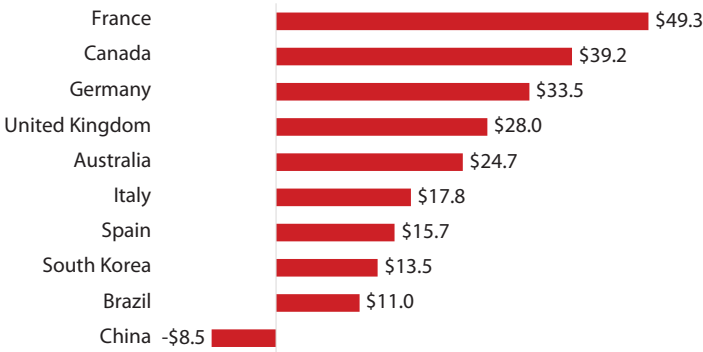
**Figure 9: Share of International Visitors by Country, 2022**



Source: Tourism Economics

**Figure 10: Change in International Visitor Spending in Utah by Country, 2021-2022**

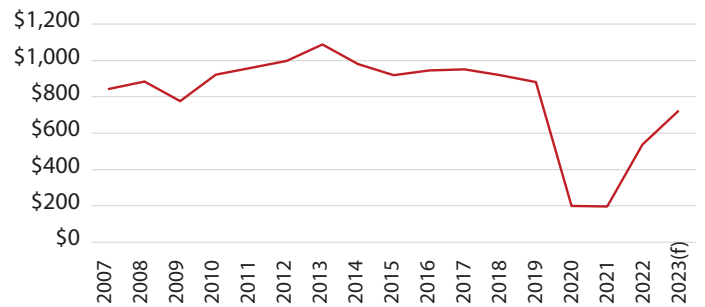
(Millions of Dollars)



Source: Tourism Economics

**Figure 11: International Visitor Spending in Utah, 2007-2023(f)**

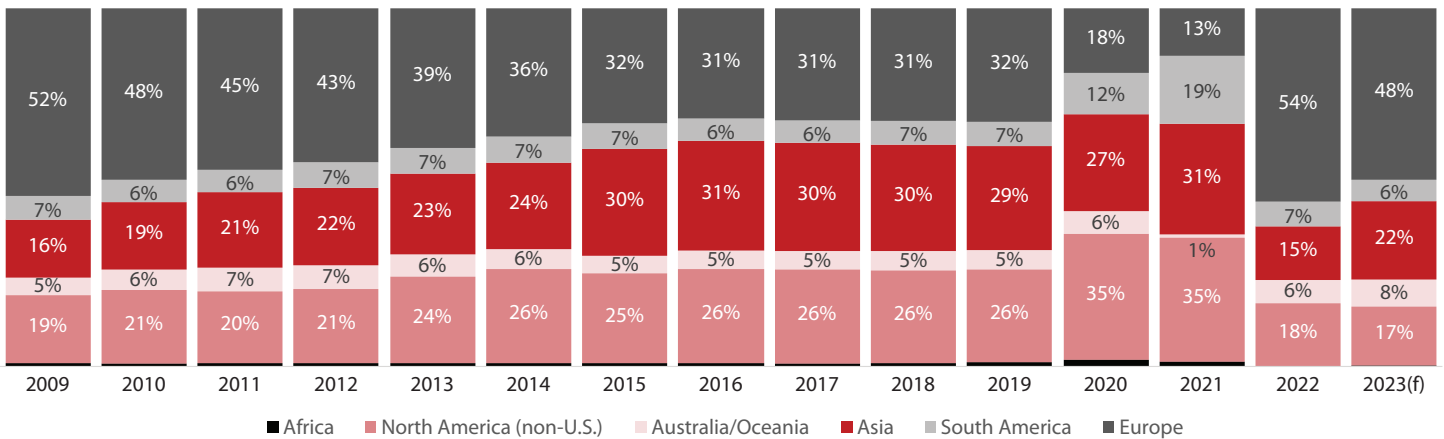
(Millions of 2023 Dollars)



Note: (f) = forecast

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

**Figure 12: Shares of International Spending in Utah by Continent, 2007-2023(f)**



Note: (f) = forecast

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

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).



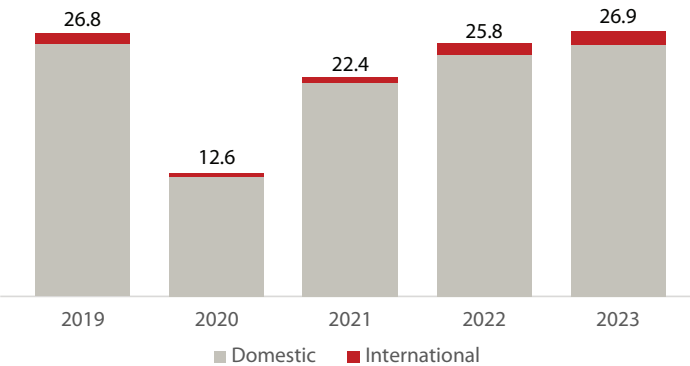
### SLC International Airport and Air Travel

Salt Lake City International Airport’s steady growth continued in 2023 with a 4.6% year-over 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

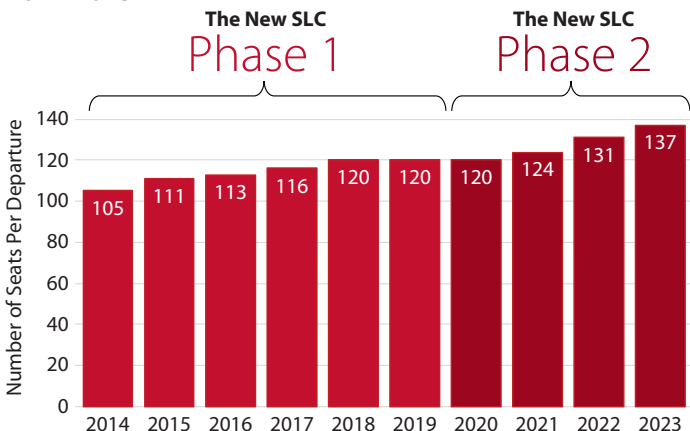
**Figure 13: Salt Lake City International Airport Total Passengers, 2019-2023**

(Millions of Passengers)



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

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



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

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.

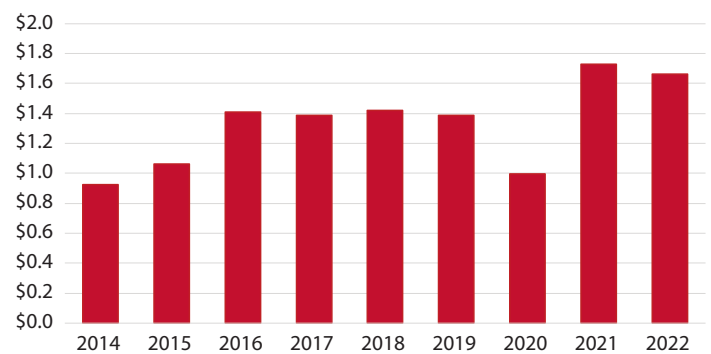
### Park Visitation

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

**Figure 15: Utah National Park Annual Visitor Spending, 2014-2022**

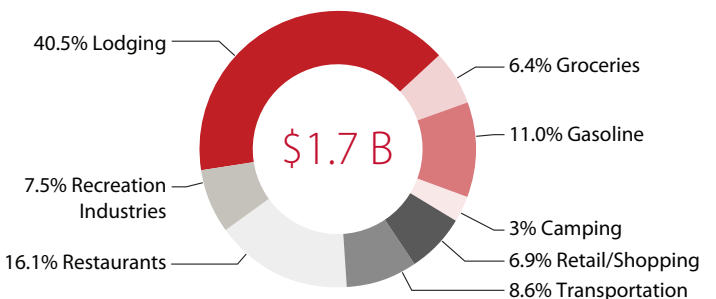
(Billions of 2022 Dollars)



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**

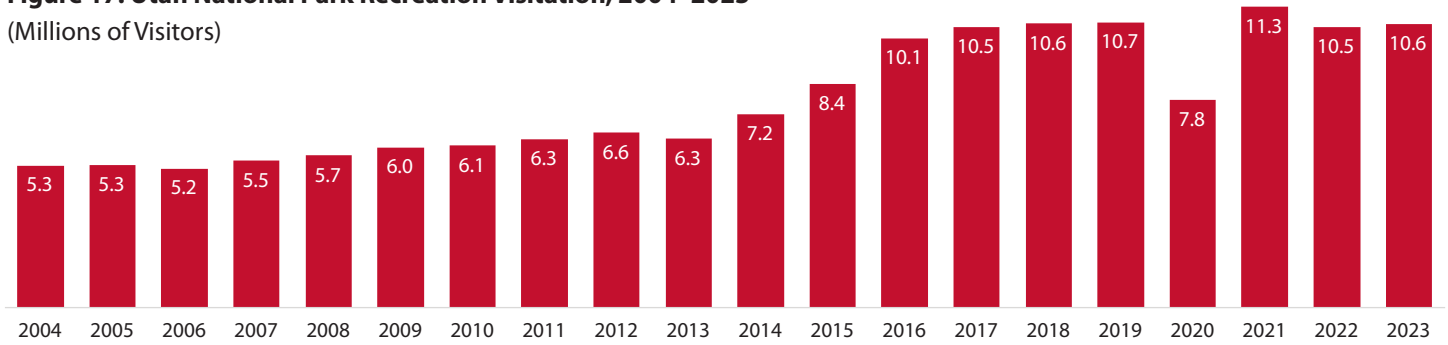
(Billions of 2022 Dollars)



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

**Figure 17: Utah National Park Recreation Visitation, 2004–2023**

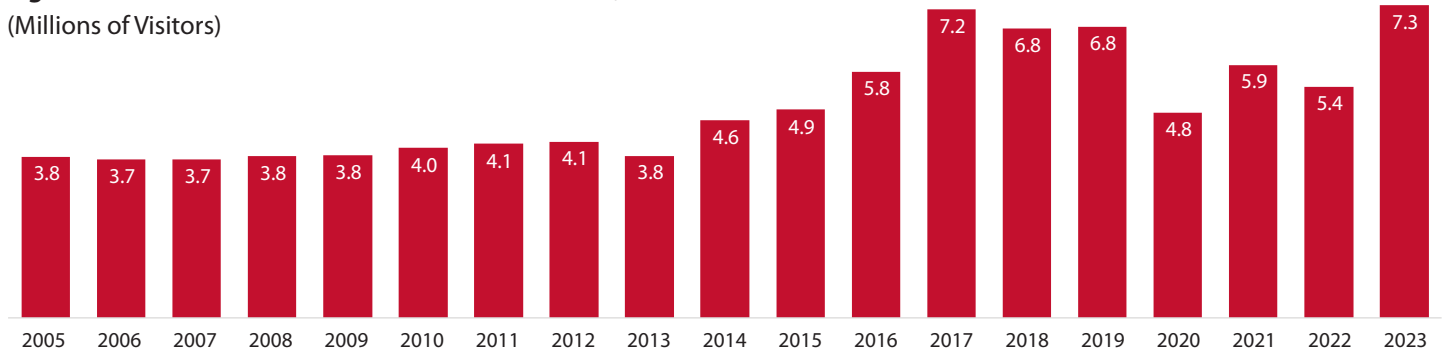
(Millions of Visitors)



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 18: Utah National Place Recreation Visitation, 2005-2023**

(Millions of Visitors)



Note: Flaming Gorge and Bears Ears visitation data are not included.  
Source: Kem C. Gardner Policy Institute analysis of National Park Service and Bureau of Land Management data

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 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 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.

**Table 2: Utah National Park Recreation Visitation by Park, 2022-2023**

Utah National Parks	2022	2023	2022-2023
Arches	1,460,652	1,482,045	1.5%
Bryce Canyon	2,354,660	2,461,269	4.5%
Canyonlands	779,147	800,423	2.7%
Capitol Reef	1,227,608	1,268,861	3.4%
Zion	4,692,417	4,623,238	-1.5%
<b>Total National Park Visitors</b>	<b>10,514,484</b>	<b>10,635,836</b>	<b>1.2%</b>

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

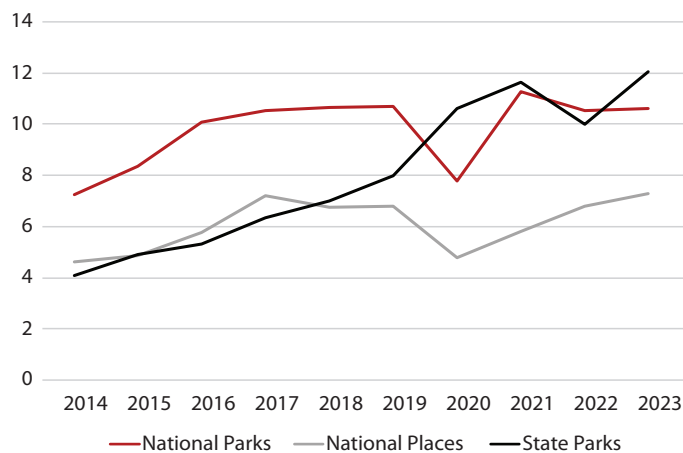
**Table 3: Utah National Place Recreation Visitation by Site, 2021-2022**

Utah National Places	2022	2023	2021-2022
Cedar Breaks NM	688,644	614,292	-10.8%
Dinosaur NM	351,019	328,123	-6.5%
Glen Canyon NRA	2,842,776	5,206,934	83.2%
Golden Spike NHS	49,042	53,017	8.1%
Grand Staircase–Escalante NM	1,182,402	892,499	-24.5%
Hovenweep NM	28,446	28,977	1.9%
Natural Bridges NM	71,249	78,752	10.5%
Timpanogos NM	155,995	120,656	-22.7%
<b>Total National Place Visits</b>	<b>5,369,573</b>	<b>7,323,250</b>	<b>36.4%</b>

Note: Flaming Gorge, Rainbow Bridge, and Bears Ears visitation data not included.  
NM = National Monument. NRA = National Recreation Area. NHS = National Historical Park.  
Source: Kem C. Gardner Policy Institute analysis of National Park Service and Bureau of Land Management data

**Figure 19: Total Visitation by Utah National Park, National Place, and State Park, 2014-2023**

(Millions of Visitors)



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

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 reported 22,000 fewer visitors than the prior year.

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).

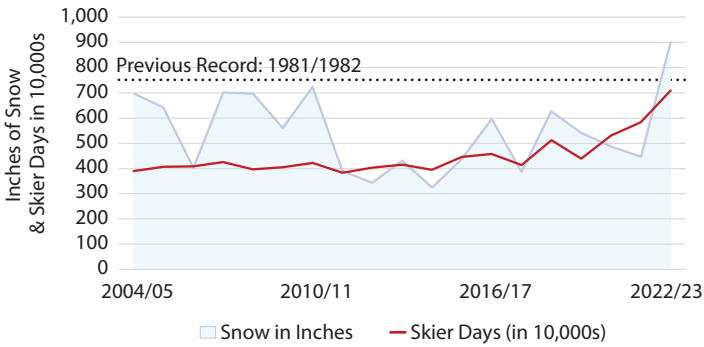
**Table 4: Total Visitation by Utah State Park, 2022-2023**

Utah State Park Visitation	2022	2023	2022-2023
Anasazi Indian Village State Park	17,301	19,950	15.3%
Antelope Island State Park	885,078	936,147	5.8%
Bear Lake State Park	539,173	569,903	5.7%
Camp Floyd - Stage Coach Inn State Park	16,149	12,240	-24.2%
Coral Pink Sand Dunes State Park	229,528	229,004	-0.2%
Dead Horse Point State Park	1,069,571	1,080,536	1.0%
Deer Creek State Park	587,053	702,504	19.7%
East Canyon State Park	205,560	232,674	13.2%
Echo State Park	25,254	133,435	428.4%
Edge Of The Cedars State Park	13,776	13,616	-1.2%
Escalante Petrified Forest State Park	73,969	90,822	22.8%
Fred Hayes State Park at Starvation	139,478	153,539	10.1%
Fremont Indian State Park	48,541	51,605	6.3%
Frontier State Park	15,039	15,289	1.7%
Goblin Valley State Park	408,342	398,961	-2.3%
Goosenecks State Park	55,660	56,368	1.3%
Great Salt Lake Marina State Park	136,170	169,376	24.4%
Green River State Park	106,154	90,002	-15.2%
Gunlock State Park	61,021	269,604	341.8%
Huntington State Park	43,231	42,125	-2.6%
Hyrum State Park	146,212	152,787	4.5%
Jordan River OHV State Park	101,398	113,728	12.2%
Jordanelle State Park	712,632	829,945	16.5%
Kodachrome Basin State Park	160,957	152,777	-5.1%
Lost Creek State Park	93	13,382	NA
Millsite State Park	18,558	23,829	28.4%
Otter Creek State Park	43,834	47,820	9.1%
Palisade State Park	184,404	257,874	39.8%
Piute State Park	534	1,321	147.4%
Point of the Mountain Sky Park	5,233	3,828	-26.8%
Quail Creek State Park	283,323	336,675	18.8%
Red Fleet State Park	36,344	14,009	-61.5%
Rockport State Park	190,420	206,575	8.5%
Sand Hollow State Park	1,089,086	1,415,555	30.0%
Scotfield State Park	35,481	45,497	28.2%
Snow Canyon State Park	735,328	954,572	29.8%
Steinaker State Park	52,931	79,300	49.8%
Territorial Statehouse State Park	6,615	9,519	43.9%
Utah Field House Of Natural History State Park	61,657	60,704	-1.5%
Utah Lake State Park	215,686	342,886	59.0%
Utah Raptor State Park	2,486	17,570	NA
Wasatch Mountain State Park	574,186	678,082	18.1%
Willard Bay State Park	540,910	880,332	62.8%
Yuba State Park	120,829	152,987	26.6%
<b>Total</b>	<b>9,995,185</b>	<b>12,059,254</b>	<b>20.7%</b>

Note: Flight Path State Recreation Area, Historic Union Pacific Rail Trail, and This is the Place Heritage Park visitation data are not included.

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

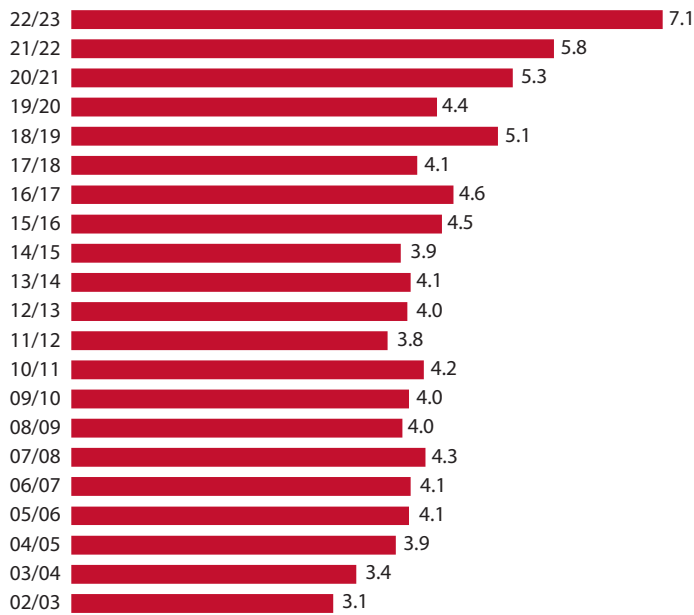
**Figure 20: Utah Snowfall and Skier Days, 2004/05 through 2022/23 Ski Seasons**



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

**Figure 21: Utah Skier Days, 2002/03 through 2022/23 Ski Seasons**

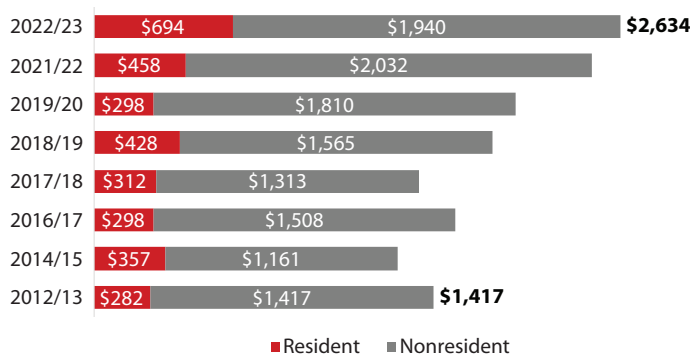
(Millions of Skier Days)



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

**Figure 22: Utah Skier/Snowboarder Spending, 2012/11 through 2022/23 Ski Seasons**

(Millions of 2022 Dollars)



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

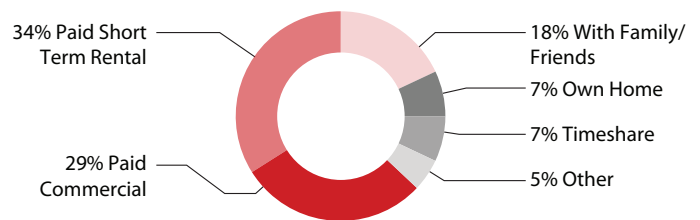
After adjusting for inflation, 2022-2023 skier spending was 5.8% greater than in 2021-2022, and nearly 32.1% higher than pre-pandemic 2019-2020.

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.

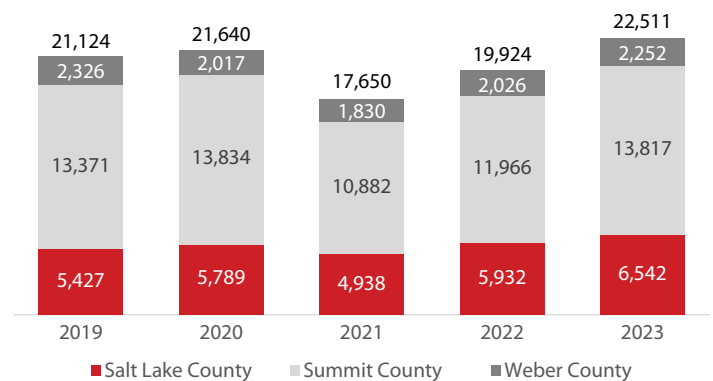
Finally, winter recreation employment in Salt Lake, Summit, and Weber counties grew 9.1% from 2022 to 2023 and 7.2% from pre-pandemic levels. This indicates a narrowing of the pandemic-impacted recreation employment gap that challenged Utah's ski industry over the past few years (Figure 24).

**Figure 23: Skier/Snowboarder Accommodations Share by Lodging Type, 2022/23 Ski Season**



Source: RRC Associates

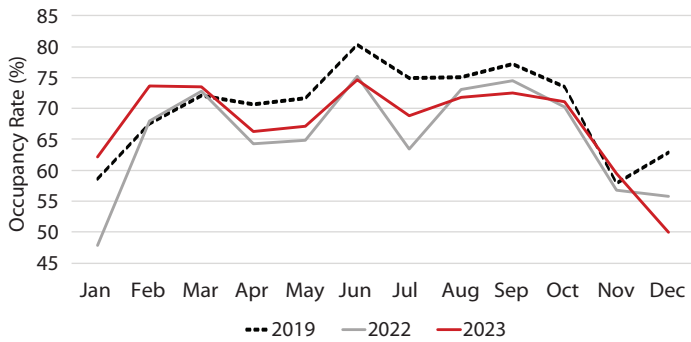
**Figure 24: Private Recreation-Related Jobs in Salt Lake and Summit Counties, Winter 2019-2023**



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

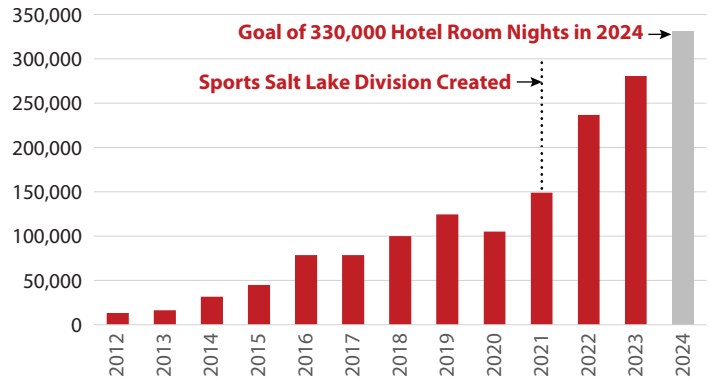
Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics data

**Figure 25: Downtown Salt Lake City Hotel Occupancy, 2021 and 2022 vs. 2019 Baseline**



Note: 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

**Figure 26: Salt Lake Sports Market: Hotel Room Night Production, 2012-2023**



Note: Sports Salt Lake is a division of Visit Salt Lake created in 2020.  
Source: Sports Salt Lake

## 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

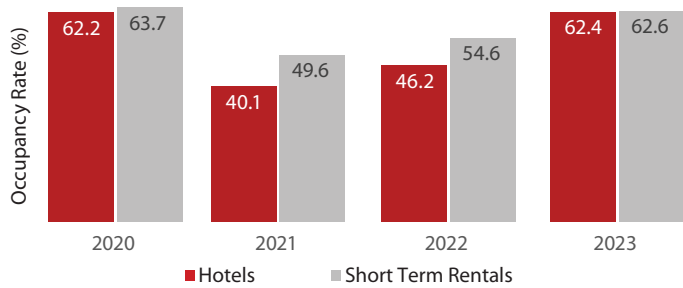
The Sundance Film Festival started in Park City, Utah almost 40 years ago and is a popular event among locals and visitors. According to Y2 Analytics’ 2023 Sundance Film Festival economic impact report, over 86,800 people attended the festival in January 2023, and one-quarter of attendees were nonresidents. 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



**Figure 27: Summit County Hotel & Short Term Rental Occupancy Rates during the Sundance Film Festival, 2020-2023**



Note: Occupancy rates include an average of the first seven days of the film festival; in January 2020, the festival took place prior to the COVID-19 pandemic. Reproduction 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 Lighthouse (formerly Transparent) and STR, Inc., data

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

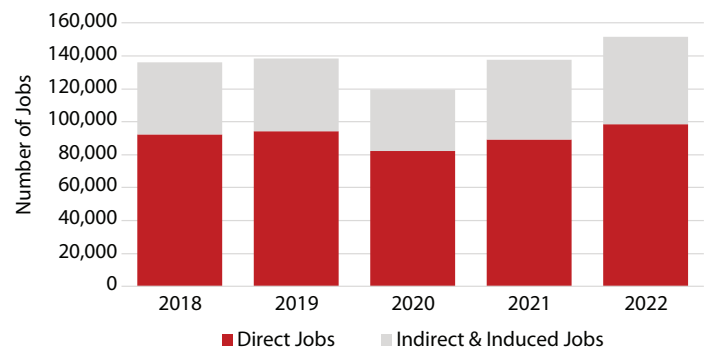
Utah's travel and tourism industry contributed to the creation of 98,600 direct jobs in 2022, propelling its statewide rank as a prominent industry sector from 8<sup>th</sup> to 7<sup>th</sup> based on job counts (Table 5). The industry's economic impact supported an additional 53,200 jobs through indirect 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.

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

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

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

**Figure 28: Utah Travel and Tourism Jobs, 2018-2022**



Note: 2021 and 2022 job counts have been revised; jobs include public and private full- and part-time jobs, and proprietors. Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Economic Analysis data

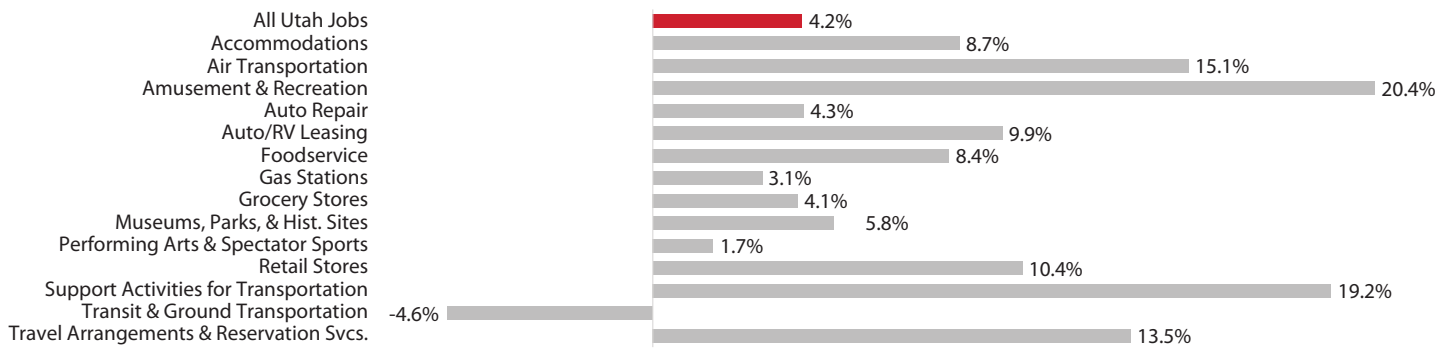
Utah's tourism-related job sectors with the most significant year-over percent increases were amusement and recreation (20.4%), support activities for transportation (19.2%), and air transportation (15.1%) (Figure 29). These three sectors had the largest number of actual job increases compared with 2021, 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 6: Utah's Top Ten Direct, Indirect, and Induced Tourism Jobs by Sector, 2022**

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

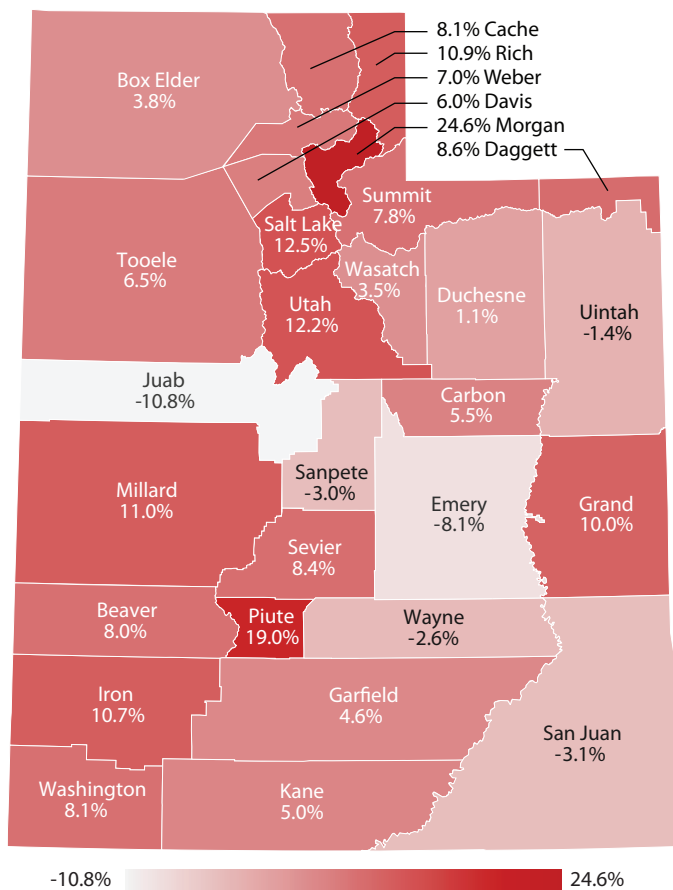
Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Economic Analysis data

**Figure 29: Year-over Change in Utah's Direct Travel & Tourism Jobs by Job Type, 2022**



Note: Includes full- and part-time public and private employment; includes self-employed. "All Utah Jobs" includes tourism and non-tourism jobs. 1,400 jobs in motion picture and video exhibition, rail travel, recreational goods rental, parking lots and garages, and vacation home rental have been omitted from this figure.  
 Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Economic Analysis data

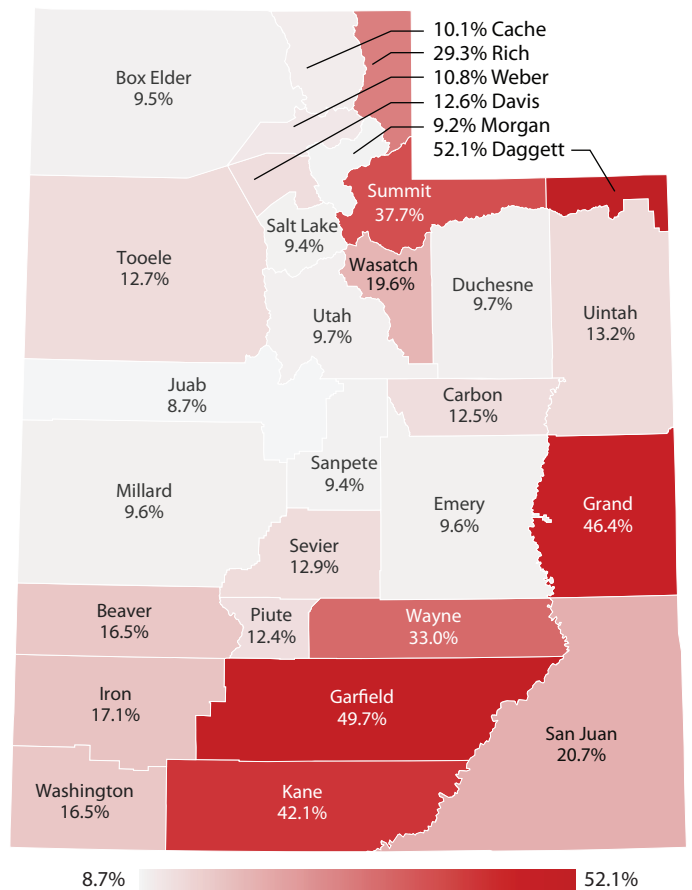
**Figure 30: Year-over Change in Private Leisure & Hospitality Jobs by County, 2022**



Note: Private full- and part-time jobs; self-employed not included.  
 Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics 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.

**Figure 31: Private Leisure & Hospitality Job Share of Total Private Jobs by County, 2022**



Note: Private full- and part-time jobs; self-employed not included.  
 Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics data

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).

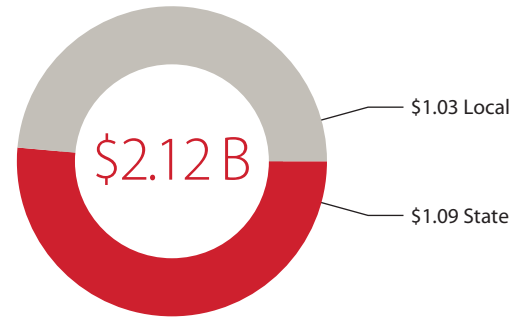


# Tax Revenue

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).

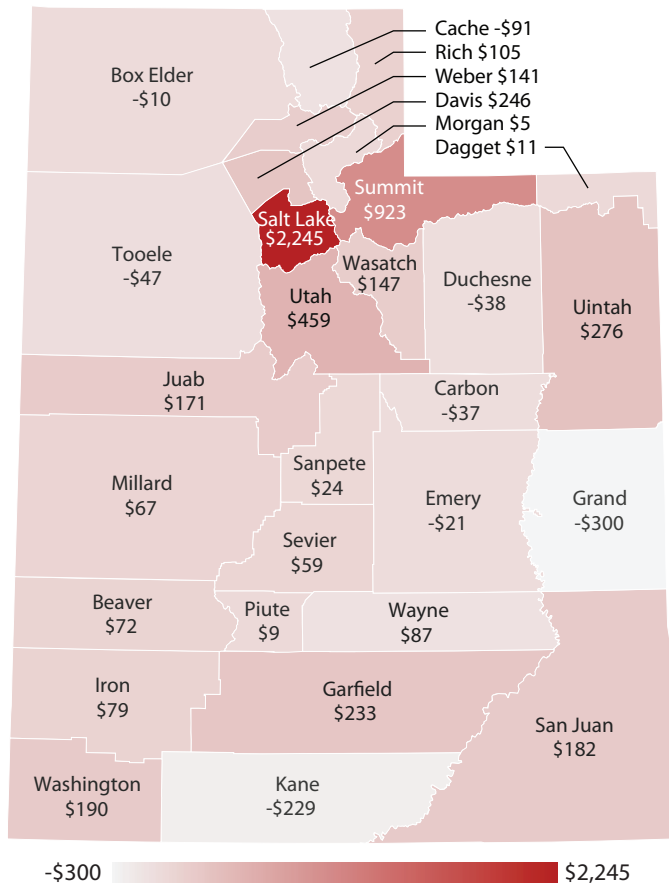
**Figure 32: Total Travel and Tourism-Generated Tax Revenue, 2022**



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

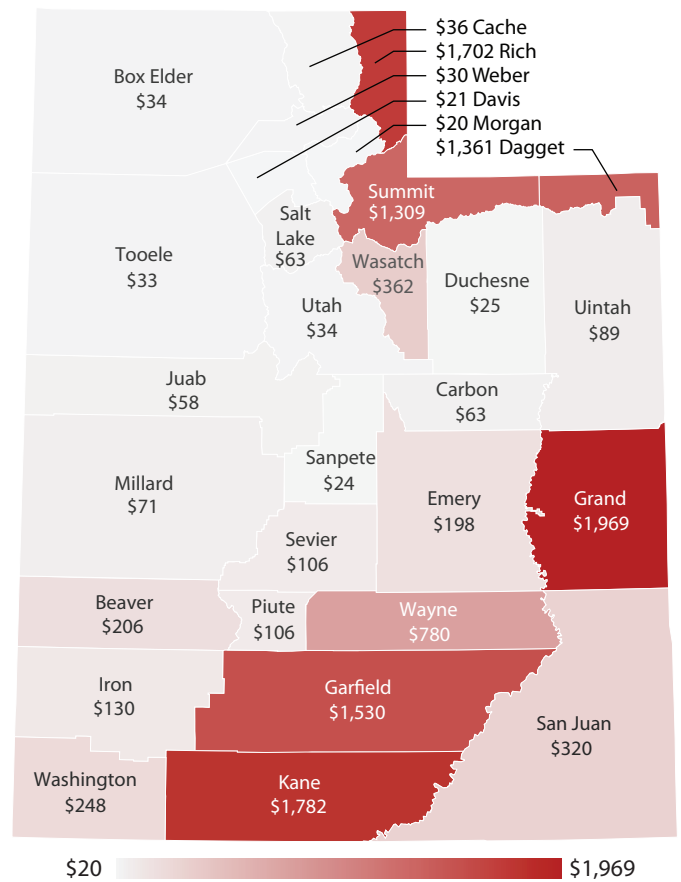
**Figure 33: Year-over Change in County Transient Room Tax Revenue by County, 2023**

(Thousands of Dollars)



Note: County transient room tax revenue include January through November data for each year.  
Source: Kem C. Gardner Policy Institute analysis of Utah State Tax Commission data

**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

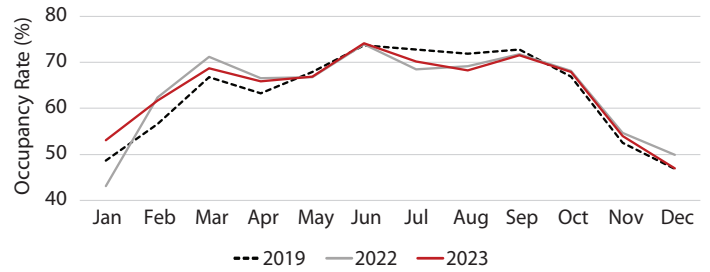
# Hotel Occupancy & Rates

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

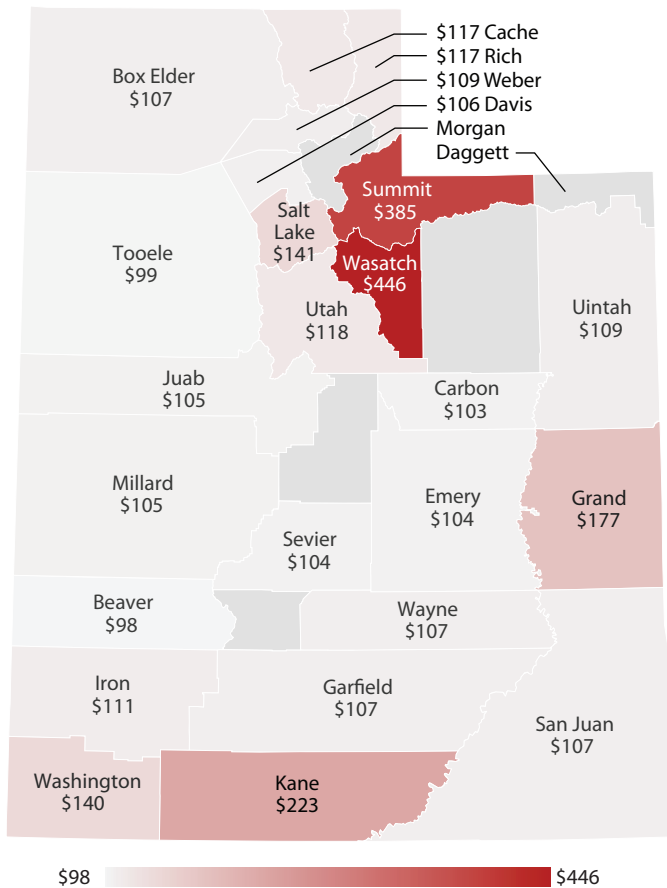
**Figure 35: Statewide Hotel Occupancy, 2022 and 2023 vs. 2019 Baseline**



Note: 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

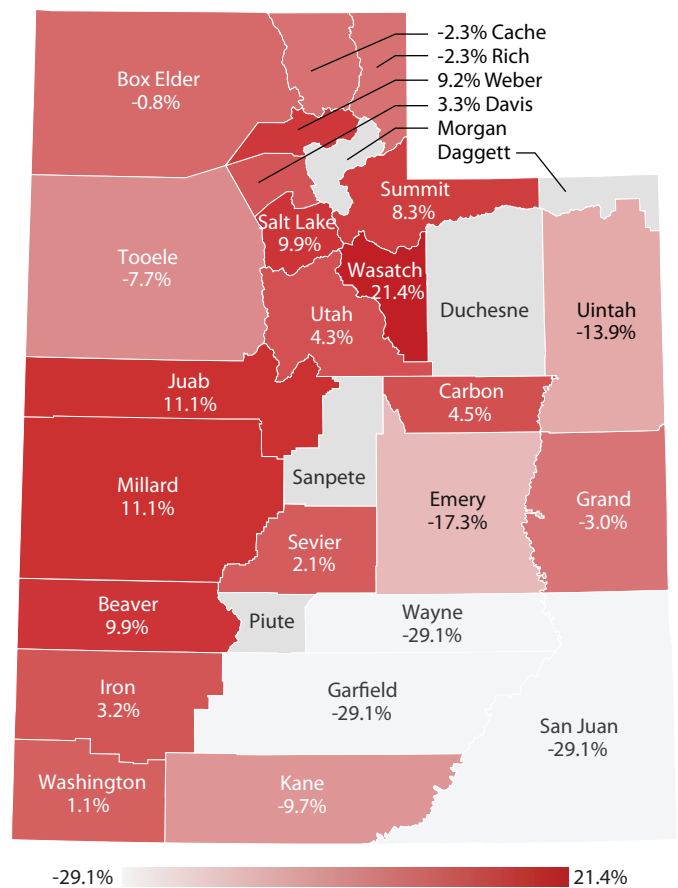
\$446, up from \$368 in 2022, while Beaver County had the lowest at \$98 (Figure 37). Among the 24 counties reporting ADRs, 13 observed year-over increases (Figure 37). Wasatch County saw the most significant percent increase from 2022 at 21.4%, followed by Millard-Juab with an 11.1% increase. In terms 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**



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

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

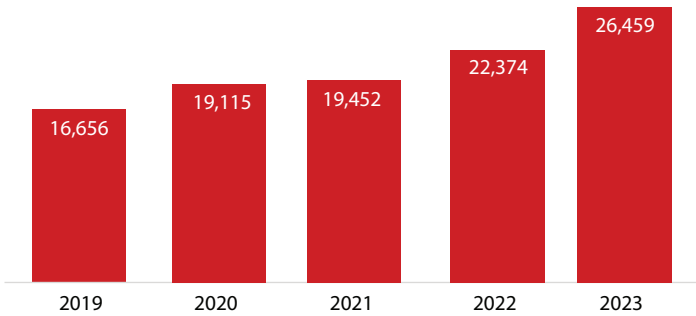


Note: No data exists for counties shaded light grey; Millard-Juab, Garfield-San Juan-Wayne, and Cache-Rich county rates are combined and averaged. Republication or other re-use of this data without the express written permission of STR is strictly prohibited.  
Source: Kem C. Gardner Policy Institute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

### Short term Rentals

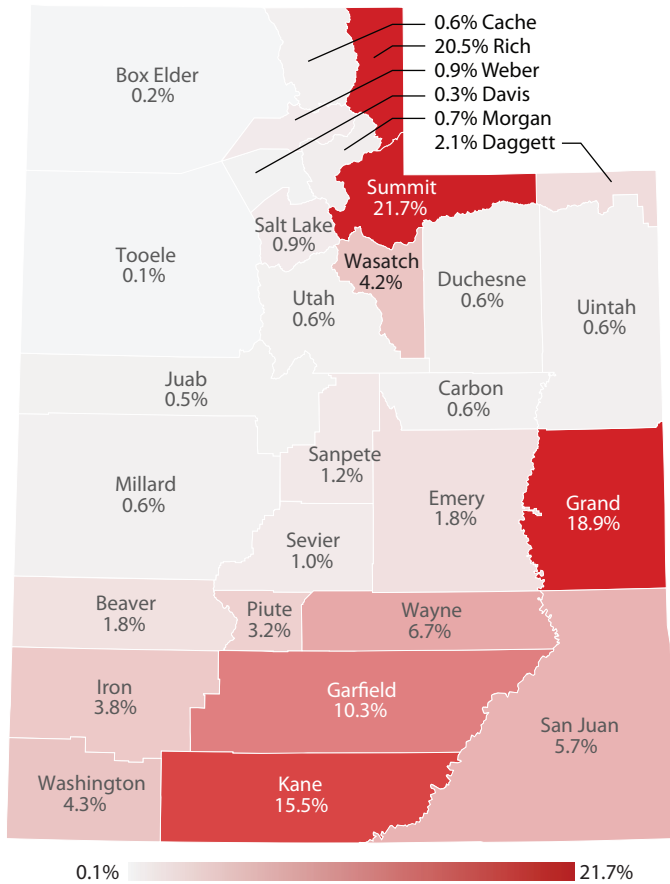
According to Lighthouse (formerly Transparent), a research firm specializing in short term rentals, there were 16,656 available short term rental properties statewide in 2019 and 26,459 in 2023. This marked a significant increase of 58.9% over the span of five years, with an annualized growth rate of 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

**Figure 38: Utah's Short-Term Rental Supply, 2019-2023**



Note: Includes Airbnb, HomeAway, and VRBO rentals; represents average of January and July listings; "Bed and Breakfast," "Dorm," and "Other" listing types have been omitted. Source: Kem C. Gardner Policy Institute analysis of Lighthouse (formerly Transparent) data

**Figure 39: Short Term Rental Share of Total Housing Units by County, 2022**



Note: Includes Airbnb, HomeAway, and VRBO rentals; represents average of January and July listings; "Bed and Breakfast," "Dorm," and "Other" listing types have been omitted. Source: Kem C. Gardner Policy Institute analysis of Lighthouse (formerly Transparent) data

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.

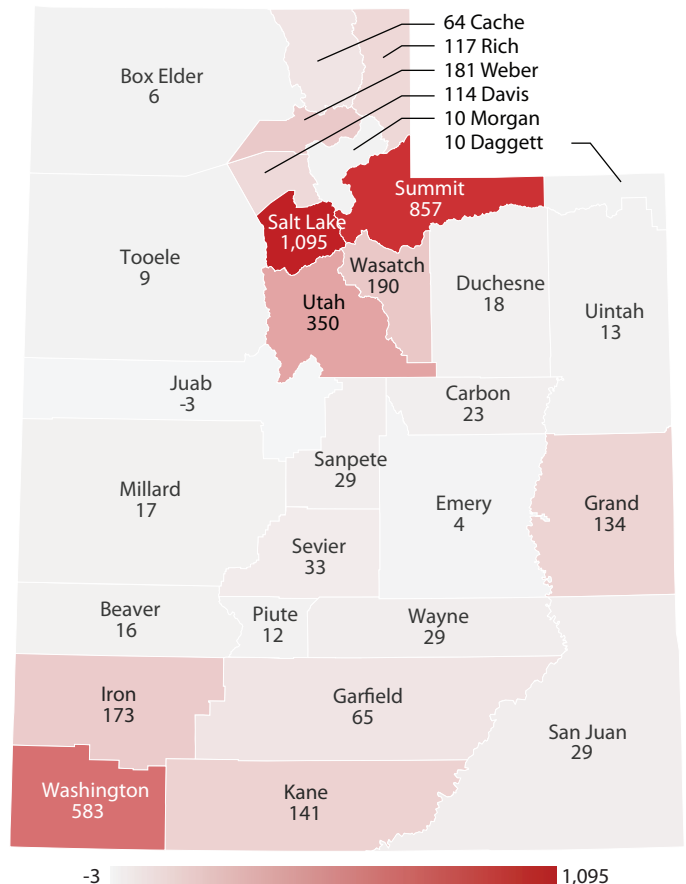
It is noteworthy that Utah experienced a substantial increase in short term rental capacity between 2019 and 2023, with an annualized growth rate of 12.5%, whereas the state's hotel room capacity saw a much slower annualized growth rate of 1.5%. That said, short term rental occupancy declined in every 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).

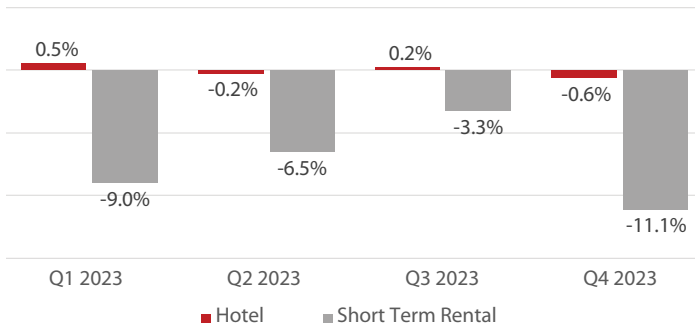
**Figure 40: Year-over Change in Number of Short Term Rental Listings by County, 2023**



Note: Includes Airbnb, HomeAway, and VRBO rentals; represents average of January and July listings; "Bed and Breakfast," "Dorm," and "Other" listing types have been omitted. Source: Kem C. Gardner Policy Institute analysis of Lighthouse (formerly Transparent) data

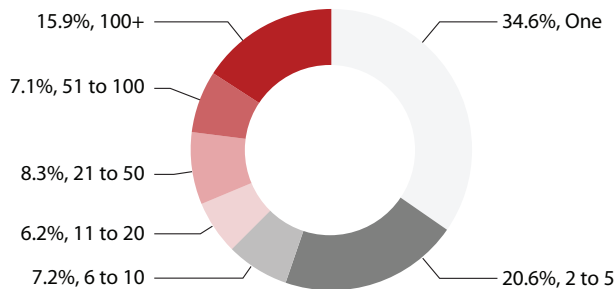
**Figure 41: Year-Over Change in Statewide Hotel and Short Term Rental Occupancy Rates by Quarter, 2023**

(Compared to Previous 12 Months)



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

**Figure 42: Short Term Rental Owner Distribution, 2023**



Source: Lighthouse (formerly Transparent)

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

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

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**

Year	2021	2022	2021-2022
Private Employment	25,805	28,176	9.2%
Private Wages (Millions)	\$794	\$997	25.6%
Public Employment	7,175	7,454	3.9%
Public Wages (Millions)	\$140	\$153	8.9%
Taxable Sales (Millions)	\$1,100	\$1,343	22.1%

Note: Includes full- and part-time employment; does not include 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, 2021-2022**

Year	2021	2022	2019-2021
Employment	18,622	20,924	12.4%
Wages (Millions)	\$575	\$720	25.3%
Taxable Sales (Millions)	\$2,617	\$3,127	19.5%

Note: Includes full- and part-time employment; does not include 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, 2021-2022**

Year	2021	2022	2021-2022
Employment	104,610	113,639	8.6%
Wages (Millions)	\$2,129	\$2,481	16.5%
Taxable Sales (Millions)	\$6,534	\$7,352	12.5%

Note: Includes full- and part-time employment; does not include proprietors. Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics and Utah State Tax Commission data

## Additional Travel & Tourism Topics

### Agritourism

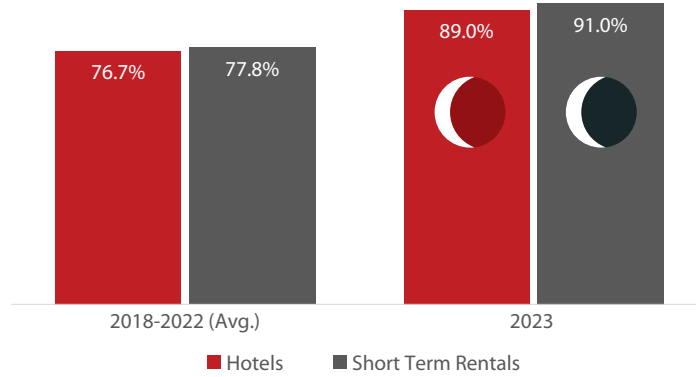
When agricultural businesses, such as a farms and ranches, invite, entertain, and educate visitors as a way to generate income, it is called "agritourism." Agritourists often participate in hands-on activities that allow them to experience and learn from agricultural operations. Several farms and ranches 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**



Source: Kem 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.



# References

- 2023 Annular Eclipse: Where and When. 2023. NASA. <https://science.nasa.gov/eclipses/future-eclipses/eclipse-2023/where-when/>
- Agritourism. 2023. U.S. Department of Agriculture, National Agricultural Library. <https://www.nal.usda.gov/human-nutrition-and-food-safety/local-foods-and-communities/agritourism#:~:text=Agritourism%20is%20a%20form%20of,%2C%20ranch%2C%20or%20business%20owner.>
- Alta Annual Snowfall Totals, 1980-2023. January 2024. Alta Ski Resort. <https://www.alta.com/weather>
- An eclipse is coming to southern Utah, and so are tourists. September 24, 2023. Salt Lake Tribune. <https://www.sltrib.com/artsliving/2023/09/24/an-eclipse-is-coming-southern-utah>
- Astrotourism Travel Guide. 2023. Utah Office of Tourism. <https://travel.utah.gov/wp-content/uploads/Astrotourism-Industry-Guide.pdf>
- Bureau of Land Management. 2023. Visits and Visitor Days by Regional Management Areas (GSENM), Fiscal Year Range October 1, 2021, to September 30, 2023 (RMIS).
- Dark Sky Parks & Places: Utah Has the Most on Earth. 2023. Utah Office of Tourism. <https://www.visitutah.com/Places-To-Go/Dark-Sky-Parks>
- Do It Like a Local: Protect & Preserve. 2023. Discover Moab. <https://www.doitlikeamoablocal.com/>
- EU Guidebook on Sustainable Development. 2023. United World Tourism Organization. <https://www.unwto.org/EU-guidebook-on-sustainable-tourism-for-development#:~:text=Expressed%20simply%2C%20sustainable%20tourism%20can,environment%2C%20and%20host%20communities>
- Here's why Garfield County wants to increase visitation to Utah's Mighty 5 during peak months. December 6, 2022. Ksltv.com. <https://ksltv.com/513744/heres-why-garfield-county-wants-to-increase-visitation-to-utahs-mighty-5-during-peak-months/>
- Lighthouse (formerly Transparent). 2019–2023. Short-term Rental Data. Bi-Monthly Download.
- Omnitrak Group, Inc. September 2023. Utah Visitor Profile and Insights Report.
- Red Emerald Strategic Plan. 2023. Utah Office of Tourism. <https://travel.utah.gov/wp-content/uploads/STRATEGIC-PLAN.pdf>
- RRC Associates. Ski Utah 2022/2023 Visitor Survey Report. June 2023. RRC Associates and Ski Utah.
- Salt Lake City International Airport. September 2018. Salt Lake City International Airport Redevelopment Program Economic Impact Analysis. <https://slairport.com/assets/pdfDocuments/The-New-SLC/Airport-EIA-Final-Report.pdf>
- Salt Lake County Forms the First Convention and Tourism Assessment Area in Utah. June 2023. Civitas Advisors. <https://civitasadvisors.com/salt-lake-county-forms-the-first-convention-and-tourism-assessment-area-in-utah/>
- Salt Lake County's hotels say a new room surcharge will help them boost overnight stays in downtown SLC and some suburban cities. April 18, 2023. Salt Lake Tribune. <https://www.sltrib.com/news/2023/04/18/guests-soon-may-pay-more-stay-sl/>
- SLC International Airport sets record as throngs of post-pandemic passengers take to the skies. January 30, 2024. Salt Lake Tribune. <https://www.sltrib.com/news/2024/01/30/salt-lake-city-airport-sets-record/>
- STR, Inc. 2023 Utah Hotel & Lodging Reports: January 2019–December 2023.
- Sustainable Development. 2023. United National World Tourism Organization. <https://www.unwto.org/sustainable-development>
- 'The outlook is optimistic': Utah's tourism industry still buzzing after record \$12B year. August 11, 2023. St. George News. <https://www.stgeorgeutah.com/news/archive/2023/08/11/the-outlook-is-optimistic-utahs-tourism-industry-still-buzzing-after-record-12b-year/>
- Tourism Economics, An Oxford Economics Company. September 2023. International State Travel: Summary of International Travel to the U.S.
- Tourism Economics, An Oxford Economics Company. August 2023. Travelers Direct Spending in Utah, 2016-2022.
- U.S. Bureau of Economic Analysis. 2023. Regional Data: GDP and Personal Income. Annual Gross Domestic Product by State. <https://www.bea.gov/itable/regional-gdp-and-personal-income/>
- U.S. Bureau of Labor Statistics. 2023. Databases, Tables & Calculators by Subject: State and County Employment and Wages (QCEW). <https://www.bls.gov/data/>
- U.S. National Park Service. 2023. 2022 National Park Spending Effects: Economic Contributions to Local Communities, States, and the Nation. <https://www.nps.gov/subjects/socialscience/vse.htm>
- U.S. National Park Service. 2023. Visitor Use Statistics. Retrieved from <https://irma.nps.gov/Stats/>
- U.S. Travel Association. January 2024. US Travel Spending, Visitor Volume, and Travel Price Index Tables. [https://www.ustravel.org/sites/default/files/2024-01/us\\_travel-forecast\\_fall2023-1.pdf](https://www.ustravel.org/sites/default/files/2024-01/us_travel-forecast_fall2023-1.pdf)
- U.S. Travel Association. June 2023. US Travel Spending, Visitor Volume, and Travel Price Index Tables. [https://www.ustravel.org/sites/default/files/2023-06/us\\_travel-forecast\\_summer2023.pdf](https://www.ustravel.org/sites/default/files/2023-06/us_travel-forecast_summer2023.pdf)
- U.S. Travel Association. April 2023. U.S. Travel Answer Sheet and Inbound International Travel Fact Sheet. <https://www.ustravel.org/research/travel-facts-and-figures>
- Utah celebrates over 700 inches of snowfall in record time and skiers are taking full advantage. March 24, 2023. Travel & Leisure. <https://www.travelandleisure.com/utah-snow-record-resort-skiing-7371129>
- Utah Department of Workforce Services. 2023. Utah Economic Data Viewer - Employment and Wages. <https://jobs.utah.gov/jsp/utalmis/#/industry>
- Utah's large-scale events industry is booming. February 23, 2023. Utah Business. <https://www.utahbusiness.com/utahs-events-industry-is-booming-economy-large-scale/>
- Utah Office of Tourism. 2023. An Industry Guide to Astrotourism. <https://travel.utah.gov/wp-content/uploads/Astrotourism-Industry-Guide.pdf>
- Utah Office of Tourism. 2023. Utah Tourism Industry Metrics. <https://travel.utah.gov/research-planning/utah-tourism-industry-metrics>
- Utah's ski resorts shatter previous visitation records with help of long winter. June 1, 2023. KSL News. <https://www.ksl.com/article/50657859/utahs-ski-resorts-shatter-previous-visitation-records-with-help-of-long-winter>
- Utah State Parks. January 2024. Resources: Park Visitation. <https://stateparks.utah.gov/resources/park-visitation-data/>
- Utah State Tax Commission. 2023. Annual Report: 2022 Fiscal Year. <https://tax.utah.gov/commission/reports/fy22report.pdf>
- Utah State University study shows broad support for Arches National Park timed entry systems. April 18, 2023. National Parks Conservation Association. <https://www.npca.org/articles/3467-utah-state-university-study-shows-broad-support-for-arches-national-park>
- Visit Salt Lake. 2022 Annual Report: Building the Future. 2022. Visit Salt Lake. <https://mydigitalpublication.com/publication/?i=786291>
- What is Sustainable Tourism? 2023. Global Sustainable Tourism Council. <https://www.gstcouncil.org/what-is-sustainable-tourism/>
- Y2 Analytics. Economic Impact: 2023 Sundance Film Festival. [https://drive.google.com/file/d/1XeKyXBNLXZAnI2FrZEJMMfXVh\\_Bn1P7F/view](https://drive.google.com/file/d/1XeKyXBNLXZAnI2FrZEJMMfXVh_Bn1P7F/view)
- Y2 Analytics. Economic Impact: 2020 Sundance Film Festival. <https://www.sundance.org/pdf/2020%20Sundance%20Film%20Festival%20Economic%20Impact%20Report.pdf>
- Y2 Analytics. Economic Impact: 2019 Sundance Film Festival. <https://www.sundance.org/pdf/sff19-economic-impact-report.pdf>
- Y2 Analytics. Economic Impact: 2018 Sundance Film Festival. <http://www.sundance.org/pdf/festival-info/sff18-economic-impact-report.pdf>
- Y2 Analytics. Economic Impact: 2017 Sundance Film Festival. <https://www.sundance.org/pdf/festival-info/sff17-economic-impact-report.pdf>





## Partners in the Community

The following individuals and entities help support the research mission of the Kem C. Gardner Policy Institute.

### Legacy Partners

The Gardner Company  
Christian and Marie Gardner Family  
Intermountain Healthcare  
Clark and Christine Ivory Foundation  
KSL and Deseret News  
Larry H. & Gail Miller Family Foundation  
Mountain America Credit Union  
Salt Lake City Corporation  
Salt Lake County  
University of Utah Health  
Utah Governor's Office of Economic Opportunity  
WCF Insurance  
Zions Bank

### Executive Partners

The Boyer Company  
Clyde Companies

### Sustaining Partners

Dominion Energy  
Salt Lake Chamber  
Staker Parson Materials and Construction  
Wells Fargo

## Kem C. Gardner Policy Institute Advisory Board

### Conveners

Michael O. Leavitt  
Mitt Romney

### Board

Scott Anderson, Co-Chair  
Gail Miller, Co-Chair  
Doug Anderson  
Deborah Bayle  
Roger Boyer  
Michelle Camacho  
Sophia M. DiCaro  
Cameron Diehl

Lisa Eccles  
Spencer P. Eccles  
Christian Gardner  
Kem C. Gardner  
Kimberly Gardner  
Natalie Gochnour  
Brandy Grace  
Jeremy Hafen  
Rachel Hayes  
Clark Ivory  
Mike S. Leavitt  
Derek Miller  
Ann Millner

Sterling Nielsen  
Jason Perry  
Ray Pickup  
Gary B. Porter  
Taylor Randall  
Jill Remington Love  
Brad Rencher  
Josh Romney  
Charles W. Sorenson  
James Lee Sorenson  
Vicki Varela

### Ex Officio (invited)

Governor Spencer Cox  
Speaker Mike Schultz  
Senate President  
Stuart Adams  
Representative  
Angela Romero  
Senator Luz Escamilla  
Mayor Jenny Wilson  
Mayor Erin Mendenhall

## Kem C. Gardner Policy Institute Staff and Advisors

### Leadership Team

Natalie Gochnour, Associate Dean and Director  
Jennifer Robinson, Chief of Staff  
Mallory Bateman, Director of Demographic Research  
Phil Dean, Chief Economist and Senior Research Fellow  
Shelley Kruger, Accounting and Finance Manager  
Colleen Larson, Administrative Manager  
Nate Lloyd, Director of Economic Research  
Dianne Meppen, Director of Community Research  
Laura Summers, Director of Industry Research  
Nicholas Thiriot, Communications Director  
James A. Wood, Ivory-Boyer Senior Fellow

### Staff

Eric Albers, Public Policy Analyst  
Samantha Ball, Senior Research Associate  
Parker Banta, Public Policy Analyst  
Melanie Beagley, Public Policy Analyst  
Preston Brightwell, Dignity Index Field Director  
Andrea Thomas Brandley, Senior Education Analyst  
Kara Ann Byrne, Senior Research Associate  
Mike Christensen, Scholar-in-Residence  
Nate Christensen, Research Economist  
Dejan Eskic, Senior Research Fellow and Scholar  
Emily Harris, Senior Demographer  
Michael T. Hogue, Senior Research Statistician  
Mike Hollingshaus, Senior Demographer  
Thomas Holst, Senior Energy Analyst  
Madeleine Jones, Dignity Index Field Director

Jennifer Leaver, Senior Tourism Analyst  
Levi Pace, Senior Research Economist  
Praopan Pratoomchat, Senior Research Economist  
Heidi Prior, Public Policy Analyst  
Natalie Roney, Research Economist  
Shannon Simonsen, Research Coordinator  
Paul Springer, Senior Graphic Designer

### Faculty Advisors

Matt Burbank, College of Social and Behavioral Science  
Elena Patel, David Eccles School of Business  
Nathan Seegert, David Eccles School of Business

### Senior Advisors

Jonathan Ball, Office of the Legislative Fiscal Analyst  
Silvia Castro, Suazo Business Center  
Gary Cornia, Marriott School of Business  
Wes Curtis, Community-at-Large  
John C. Downen, Camoin Associates  
Dan Griffiths, Community-at-Large  
Emma Houston, University of Utah  
Beth Jarosz, Population Reference Bureau  
Darin Mellott, CBRE  
Pamela S. Perlich, University of Utah  
Chris Redgrave, Community-at-Large  
Wesley Smith, Northbound Strategy  
Juliette Tennert, Community-at-Large

INFORMED DECISIONS™