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The State of Utah's Travel and Tourism Industry

Utah's travel and tourism industry remained resilient in 2024 as inflation and gas prices calmed and recession fears dissipated over the course of the year.

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DAVID ECCLES SCHOOL OF BUSINESS



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Analysis in Brief

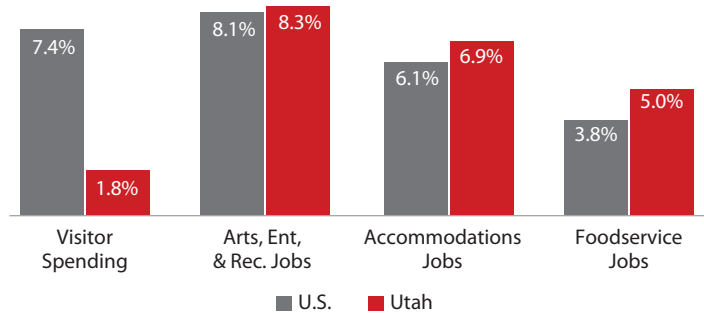
Utah's travel and tourism industry is a significant contributor to the state's economy, fostering job creation, supporting local businesses, and generating tax revenue. The industry comprises private and public entities that promote leisure and business travel and provide tourism-related goods and services.

Visitors spent a record \$12.71 billion in Utah's economy in 2023, generating 103,800 direct travel-related jobs and \$1.90 billion in direct state and local tax revenue. All key areas of Utah's tourism and hospitality sectors experienced positive performance during this time period, including visitor spending, tourism employment, tax revenue, airport travel, and state park visitation.

Key Findings

- **Spending**—Visitors spent \$12.71 billion in Utah's economy in 2023, a 1.8% increase from 2022 after adjusting for inflation.
- **Jobs**—Utah's travel and tourism industry generated 103,800 direct jobs in 2023. The industry's economic activity supported an additional 56,000 jobs through indirect and induced effects. This equates to visitor spending supporting 1 in 11 Utah jobs.
- **Tax Revenue**—The \$12.71 billion in direct visitor spending resulted in an estimated \$1.90 billion in direct state and local tax revenue in 2023. Visitor-generated tax revenue increases to \$2.35 billion with the inclusion of indirect and induced fiscal impacts.
- **Accommodations**—Year-over transient room tax revenue increased 3.9% in 2024. While hotel occupancy remained flat, the average daily rates (ADR) of hotel rooms were up 4.0%. Year-over short-term rental occupancy increased 1.7% with a 17.4% increase in ADR.
- **Airport Travel**—Utah's Salt Lake City International Airport reported a record 28.4 million passengers in 2024.
- **Park Visitation**—Utah's year-over national park and state park visitation was up 4.9% and 7.5% in 2024, respectively.
- **Ski Industry**—Utah boasted 6.7 million skier days and record spending (\$2.67 billion) during the 2023-2024 ski season.

U.S. vs. Utah Travel Indicators, Year-over Change, 2023

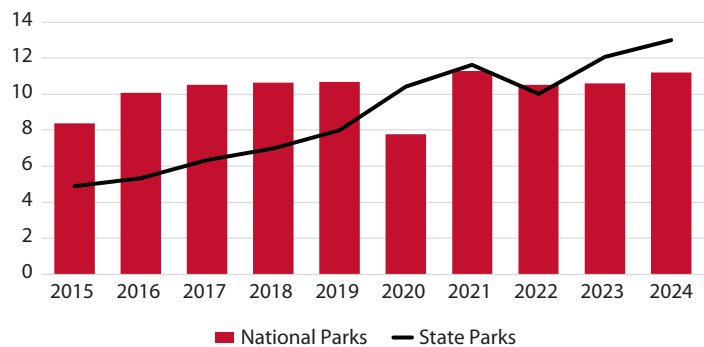


Note: Visitor spending is adjusted for inflation.

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

National Park and State Park Visitation, 2015-2024

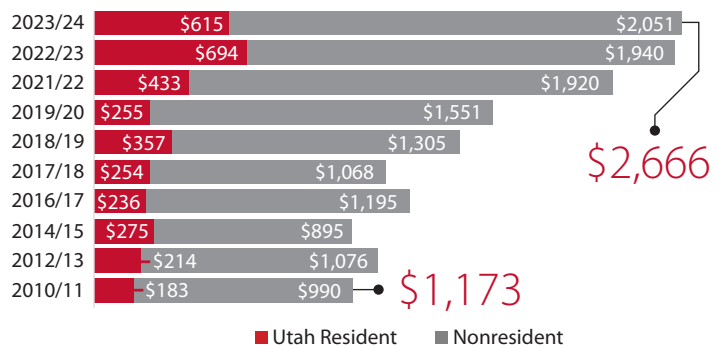
(In Millions of Visitors)



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

Utah Skier/Snowboarder Spending, 2010/11-2023/24

(In Millions of 2024 Dollars)



Note: RRC changed from biennial to annual research beginning in 2016/17; research halted in 2020/21 due to the COVID-19 pandemic.

Source: Kem C. Gardner Policy Institute analysis of RRC Associates data

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Introduction

Utah's travel and tourism industry remained resilient in 2023 and 2024 as inflation and gas prices calmed and recession fears dissipated. Visitors spent a record \$12.71 billion in 2023, a 1.8% increase from the previous year when adjusted for inflation. The industry generated 103,800 direct travel- and tourism-related jobs and indirectly supported an additional 56,000 jobs, accounting for approximately 1 in 11 Utah jobs. Visitor spending resulted in an estimated \$1.90 billion in direct state and local tax revenue. Visitor-generated tax revenue increases to \$2.35 billion with the inclusion of indirect and induced fiscal impacts.

Year-over transient room tax revenue increased an estimated 3.9% in 2024. While hotel occupancy remained flat, the average daily rates (ADR) of hotel rooms grew 4.0%. Year-over short-term rental occupancy increased 1.7% with a 17.4% increase in ADR.

Utah's ski resorts experienced the second-highest number of skier days and record spending during the 2023-2024 ski season. Utah's year-over national park and state park visitation were up 4.9% and 7.5% in 2024, respectively. Utah's Salt Lake City International Airport reported a record 28.4 million passengers in 2024.

Travel and Tourism Overview

All key areas of Utah's tourism and hospitality sectors experienced positive performance from 2023 to 2024, including transient room tax revenue, employment growth, ski industry success, park visitation growth, and international visitation.

Year-over county transient room tax revenue (TRT) increased 3.9% in 2024, and 21 of Utah's 29 counties experienced positive TRT growth. Auto short-term leasing tax revenue increased 1.8%, and restaurant tax revenue increased 4.6%. Year-over taxable leisure and hospitality sales increased 4.5% in the first three quarters of 2024.

Preliminary employment data for the first three-quarters of 2024 indicate an estimated 1.8% year-over increase in Utah's private leisure and hospitality sector jobs. Private performing arts and spectator sports jobs had the most significant percentage increase (11.1%), followed by museums and parks (8.9%), accommodations (2.3%), recreation (2.2%), and restaurants (1.0%).

The Salt Lake City International Airport experienced another record year in 2024 with 28.4 million passengers, a 5.2% year-over increase. The airport opened a new central tunnel ("River Tunnel") in fall 2024, reducing the walk from security to Concourse B by one-third of a mile. Construction is underway on Phase 4 of the airport renovation, including 16 new gates on the east side of Concourse B and a dozen new shops and

restaurants. The airport acquired two new carriers (Hawaiian and Avelo) and will welcome WestJet with service to Edmonton, Alberta, as well as its first nonstop Delta flight to Asia (Seoul/Incheon) in 2025.

Utah National Parks had the second-highest number of visitors (11.2 million) on record in 2024, and Utah State Parks set a record with 13.0 million visitors. Utah's state parks experienced record visitation in eight of the past 10 years. While state park visitation rapidly climbed in recent years, national park visitation has remained between 10.5 and 11.3 million visitors. Utah's national park visitation's annualized rate of change from 2015 to 2024 was 2.8% while state parks visitation increased at nearly five times that rate (13.7%).

Utah's ski industry reported 6.7 million skier days and a record \$2.67 billion in skier spending during the 2023-2024 ski season. Skier days were down 4.9% from the previous season (although still the second highest skier visitation on record) and skier spending was up 12.1%.

Urban travel to Salt Lake City increased in 2024. Downtown Salt Lake City's average annual hotel occupancy rate increased from 67.6% in 2023 to 71.5% in 2024, with a 6.5% year-over increase in revenue per available room (RevPAR). However, occupancy rates were down, ADR was up, and RevPAR was down or flat in the other three Wasatch Front counties (Davis, Utah, and Weber).

Utah's Board of Tourism Development allocated nearly \$4.6 million in traditional cooperative marketing matching funds in 2024. 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 the Utah Office of Tourism (UOT) matching funds to promote various statewide destinations and events. The Board also approved over \$1.2 million in grant money from the U.S. Economic Development Administration to 25 communities across the state for 33 Destination Development projects that address destination resilience.

Travel and Tourism Outlook

The 2025 travel outlook is uncertain. In January 2025, U.S. Travel Association (USTA) forecasted a 2.2% year-over increase in domestic air travel and a 8.9% year-over increase in international arrivals; however, in March 2025, international travel forecasts softened and even hinted at a decline due to global economic unpredictability, including inflationary trends, shifting economic policies, declining consumer confidence, geopolitical tensions, and international market volatility.

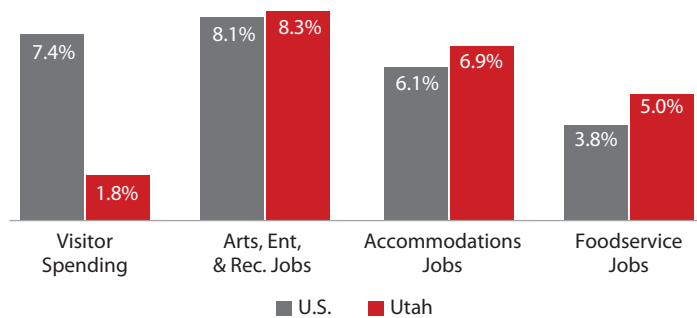
Travel and Tourism: Visitor Spending and Profile

Growth in Utah's leisure and hospitality sector jobs, including arts, entertainment, and recreation, along with accommodations and foodservice, was more significant than the sector's growth nationally, which has yet to return to pre-pandemic levels. While the leisure and hospitality employment sector fared better in Utah than at the national level, U.S. visitor spending grew at a faster rate than in Utah in 2023 (Figure 1). Year-over visitor spending rose 7.4% nationally, while visitor spending grew 1.8% in Utah. This is due to Utah visitor spending rebounding from post-pandemic 2021 and 2022 more quickly than the rest of the nation.

Tourism Economics (TE) reports that visitors directly spent \$12.71 billion in Utah's economy in 2023, constituting a 1.8% year-over increase after adjusting for inflation (Figure 2). The international share of visitor spending was 6.9% in 2023, up from 4.4% in 2022 and 1.6% in 2021, indicating a continued post-pandemic rebound in international visitor spending (Figure 3).

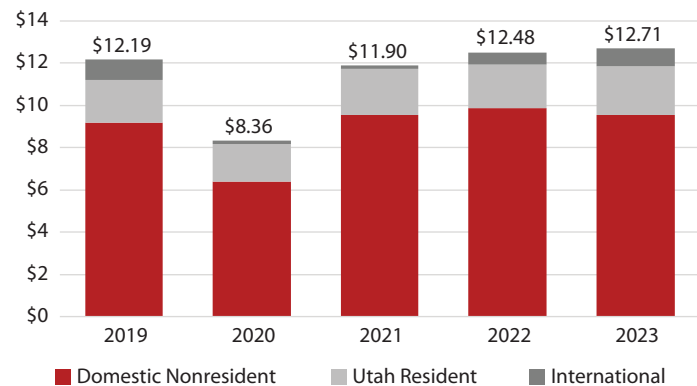
Leisure travelers contributed 92.2% of Utah's total visitor spending in 2023, and business travelers contributed 7.8%

Figure 1: U.S. vs. Utah Travel Indicators, Year-over Change, 2023



Note: Visitor spending is adjusted for inflation.
Source: Kem C. Gardner Policy Institute analysis of Tourism Economics, U.S. Travel Association, and U.S. Bureau of Labor Statistics data

Figure 2: Visitor Spending, 2019-2023

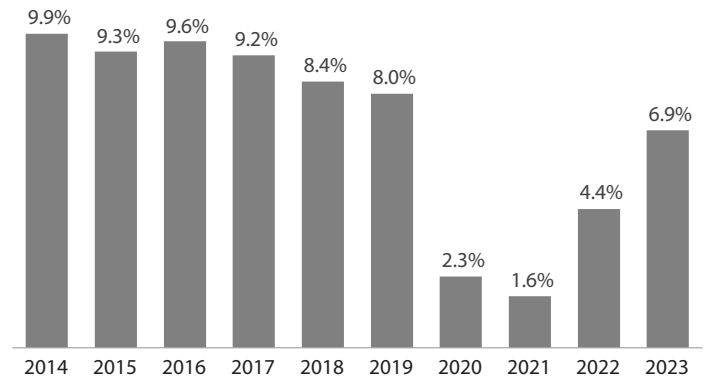


Note: Includes resident, domestic nonresident, and international visitor spending.
Source: Tourism Economics

(Figure 4). Nonresident visitor spending was nearly five times that of resident traveler spending.

Nonresident visitors and Utah resident travelers had different spending patterns in 2023. Nonresident visitors spent the largest relative dollar shares on lodging, local transportation, dining out, and entertainment and recreation (Figure 5). Utah resident travelers spent most of their dollars on lodging, dining

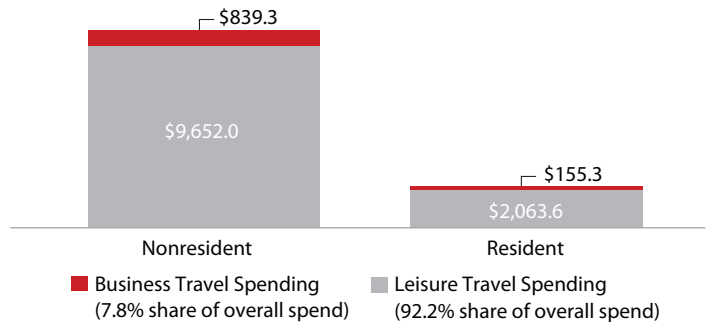
Figure 3: International Share of Visitor Spending, 2014-2023



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

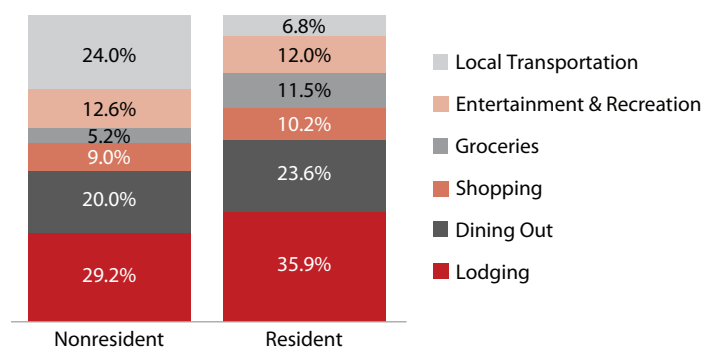
Figure 4: Visitor Spending by Visitor Type, 2023

(In Millions of Dollars)



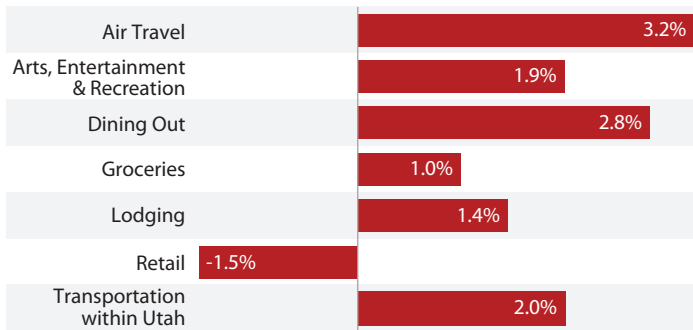
Source: Kem C. Gardner Policy Institute analysis of Omnitrak and Tourism Economics data

Figure 5: Visitor Spending Shares by Spending Category, 2023



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

Figure 6: Year-over Change in Visitor Spending by Spending Category, 2022-2023



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

Table 1: Leisure and Hospitality Taxable Sales in Utah, 2023-2024

(In Millions of Dollars)

Industry	2023 (Q1-3)	2024 (Q1-3)	2023-2024 Change
Performing Arts, Spectator Sports, Related	\$161	\$188	16.6%
Museums, Historical Sites, Zoos, Parks, Similar	\$66	\$64	-2.0%
Amusement & Recreation	\$876	\$929	6.0%
Hotels, Motels, B&Bs, Resorts, Other	\$2,563	\$2,668	4.1%
RV Parks, Camps	\$70	\$77	9.7%
Restaurants & Other Eating Places	\$5,241	\$5,482	4.6%
Special Food Services, Food Carts	\$485	\$489	0.7%
Drinking Places (alcoholic beverages)	\$184	\$186	1.3%
Total	\$9,646	\$10,083	4.5%

Note: Includes January through October sales of each year.

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

Table 2: Leisure & Hospitality Taxable Sales, Top Ten Counties, 2024 (Q1-Q3)

(In Millions of Dollars)

County	Taxable Sales (Q1-Q3)	County	Taxable Sales (Q1-Q3)
Salt Lake	\$3,904.1	Weber	\$555.8
Utah	\$1,286.5	Grand	\$240.2
Summit	\$1,129.2	Cache	\$222.0
Washington	\$801.1	Wasatch	\$201.1
Davis	\$712.8	Iron	\$162.6

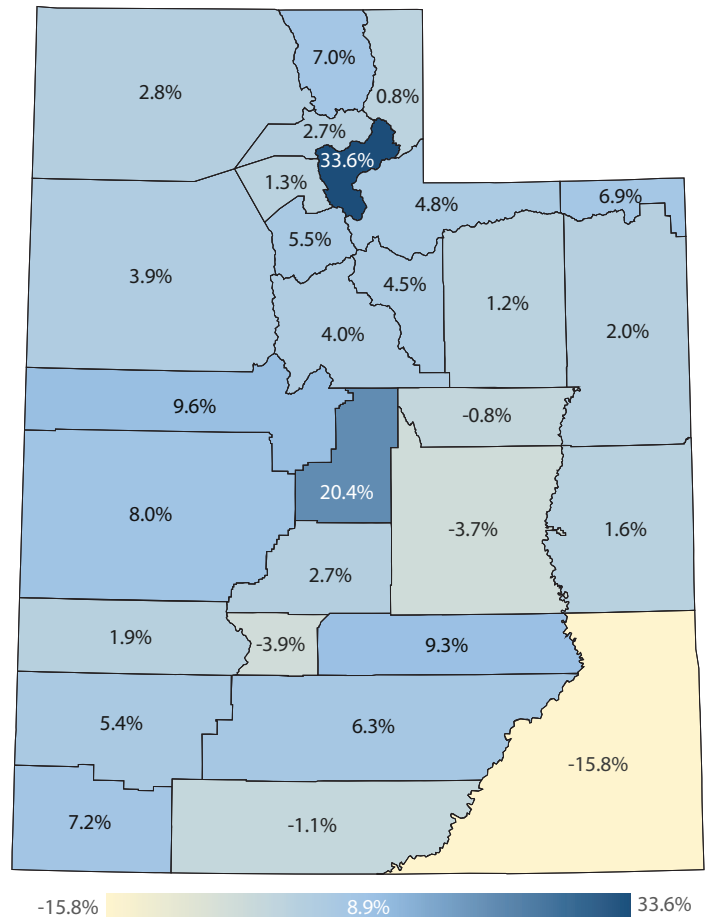
Note: Includes January through October 2024 taxable sales data only.

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

out, entertainment and recreation, and groceries. After adjusting for inflation, overall visitor spending on air travel experienced the greatest year-over increase, followed by dining out and transportation within Utah (Figure 6).

Taxable sales in Utah’s leisure and hospitality sector experienced a 4.5% year-over increase (Table 1). The sectors with the largest year-over change were performing arts and spectator sports, followed by RV parks and camps, and amusement and recreation (Table 1).

Figure 7: Year-over Percent Change in Leisure & Hospitality Taxable Sales, 2024



Note: Includes Q1-Q3 data only.

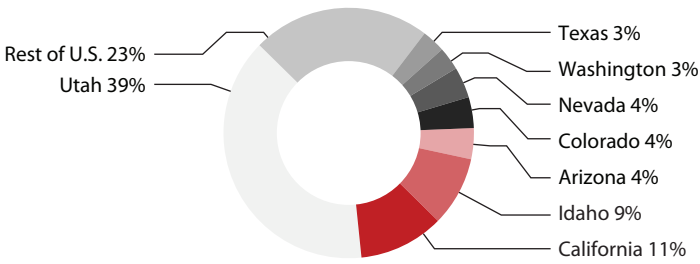
Source: Kem C. Gardner Policy Institute analysis of Utah State Tax Commission data

Five counties—Salt Lake, Utah, Summit, Washington, and Davis—generated over three-quarters of Utah’s total leisure and hospitality taxable sales during the first three quarters of 2024 (Table 2). Morgan, Sanpete, Juab, Wayne, and Millard counties reported the most significant year-over increases in leisure and hospitality taxable sales (Figure 7). Conversely, San Juan, Piute, Emery, Kane, and Carbon counties experienced the greatest year-over percentage decreases during the first three quarters of 2024.

Utah residents constituted 39% of domestic travelers in 2023. A quarter of Utah’s domestic nonresident visitors came from the three states of California, Idaho, and Arizona (Figure 8). The largest share of international arrivals came from Canada, followed by France and Mexico (Figure 9).

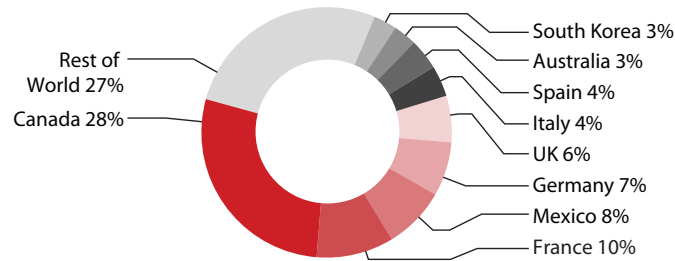
According to Visa Destination Insights, California visitors led Utah’s nonresident consumer spending in 2023 at \$499 million, followed by visitors from Idaho (\$262 million) and Nevada (\$238 million) (Figure 10). Visa card spending by visitors from these three states combined accounted for a third of all out-of-state visitor Visa credit card spending in Utah. In addition,

Figure 8: Share of Domestic Visitors by State, 2023



Source: OmniTrak Group Inc.

Figure 9: Share of International Arrivals by Country, 2023



Source: Tourism Economics

Figure 10: Nonresident Visa Spending in Utah by State Spending Share, 2023

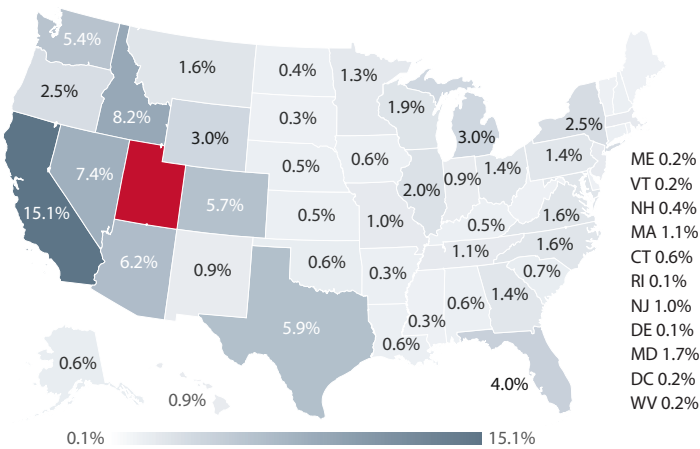
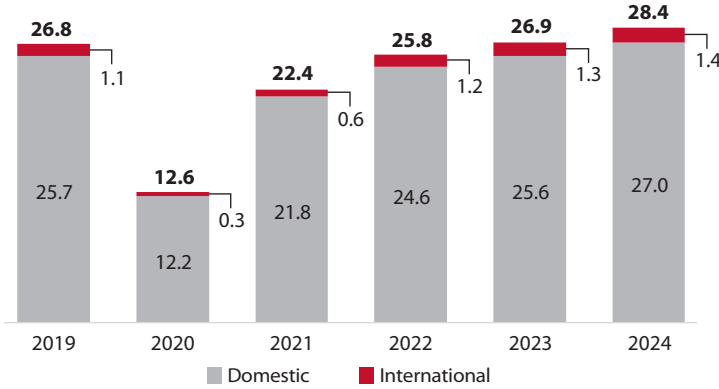


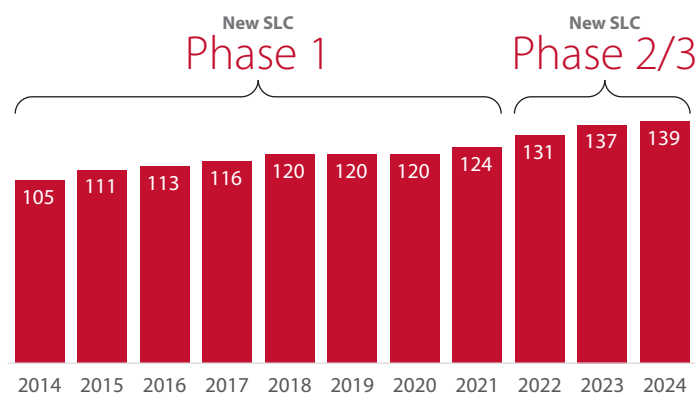
Figure 13: Salt Lake City International Airport Total Passengers, 2019-2024

(Millions of Passengers)



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

Figure 14: Salt Lake City International Airport Seats Per Departure, 2014-2024



Note: New SLC Phases 1, 2, and 3 refer to airport renovation and expansion phases; Phase 1 and 2 overlapped during 2021 and Phases 2 and 3 overlapped during 2024.
Source: Salt Lake City International Airport

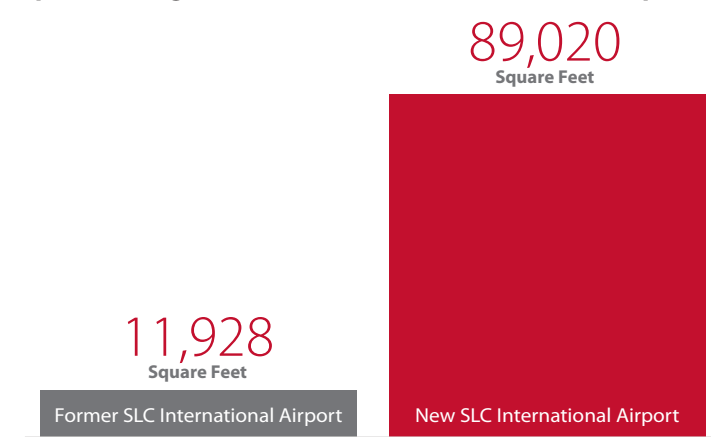
improved access to global markets. The new gates also accommodate larger aircraft, continuing the airport’s trend of moving away from smaller regional flights. The use of larger aircraft also increased seat capacity per departure. Seats per departure grew from 105 in 2014 to 139 in 2024, or a 32.4% increase (Figure 14). The airport’s lounge square footage also increased, growing from 11,928 square feet of lounge area in the former airport to 89,020 square feet in the new airport (Figure 15).

National Park Visitation

Utah’s abundant parks—including five national parks and 13 national places—draw resident and nonresident visitors to the state year-round (Figure 16).

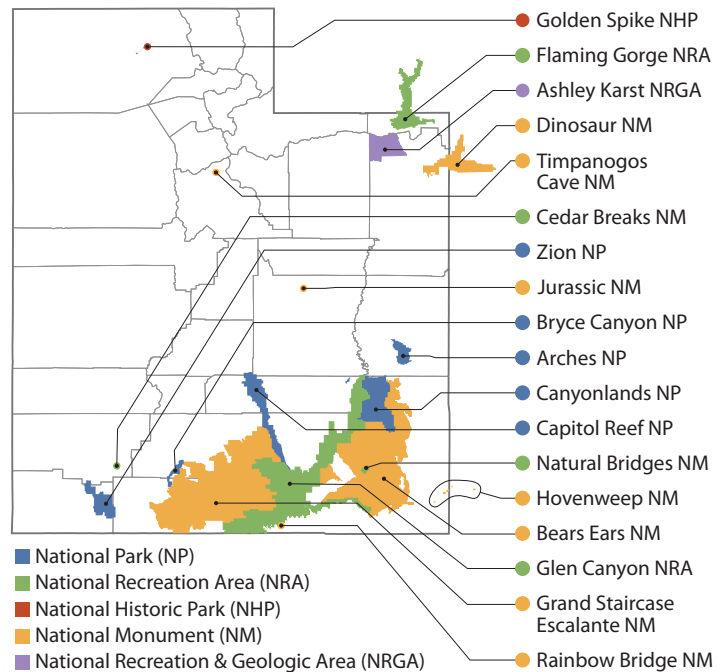
According to the National Park Service (NPS), park visitors spent a record \$1.9 billion in the Utah economy in 2023 (Figure 17), a 14.8% year-over increase from 2022. This was the third highest national park spending in the United States after California and North Carolina. National Park visitor spending in

Figure 15: Salt Lake City International Airport Lounge Square Footage, Former vs. New SLC International Airport



Source: Salt Lake City International Airport

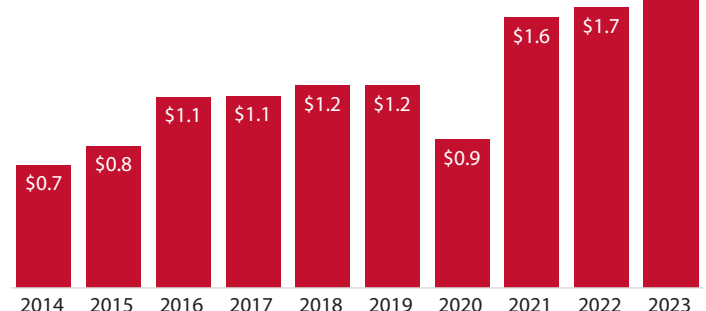
Figure 16: Utah’s National Parks & Places, 2024



Source: Kem C. Gardner Policy Institute analysis of National Park Service, Bureau of Land Management, U.S. Forest Service, and Utah Geospatial Resource Center (2024) data

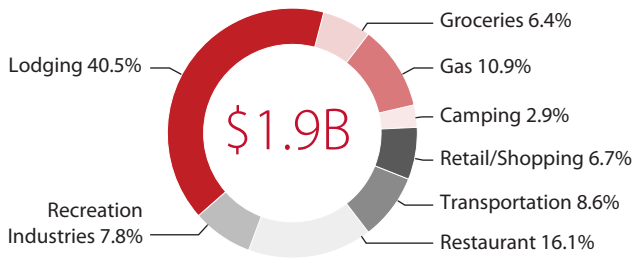
Figure 17: Utah National Park Annual Visitor Spending, 2014-2023

(In Billions of 2023 Dollars)



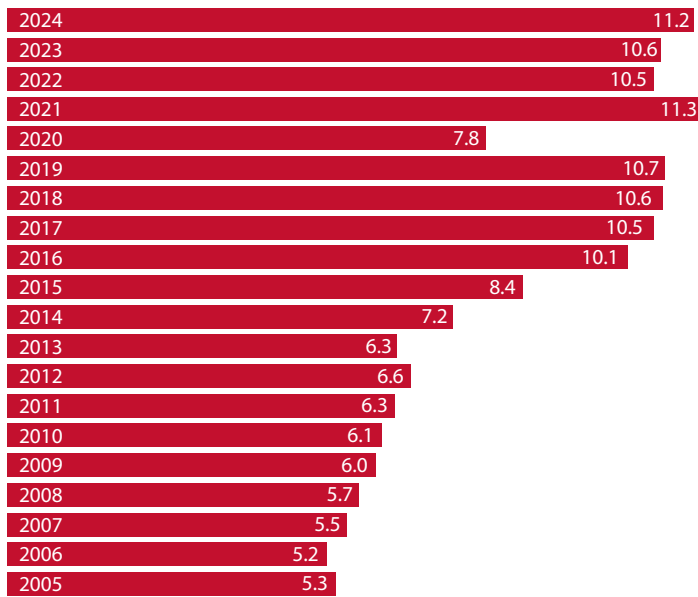
Source: National Park Service

Figure 18: Utah National Park Visitor Spending by Spending Category, 2023



Note: Includes all Utah national parks and places managed by the National Park Service.
Source: National Park Service

Figure 19: Utah National Park Recreation Visitation, 2005–2024
(Millions of Visitors)



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

Utah generated 23,300 jobs, \$985 million in labor income, and \$3.0 billion in total economic output. Utah’s national park visitors spent most of their dollars on lodging, restaurants, and gasoline (Figure 18).

Close to 11.2 million visitors recreated in Utah’s five national parks in 2024, a 4.9% year-over increase (Figure 19). Not counting 2020, national park visitation has remained between 10.5 and 11.3 million visitors since 2017. However, that is still twice the number of visitors compared to 20 years ago.

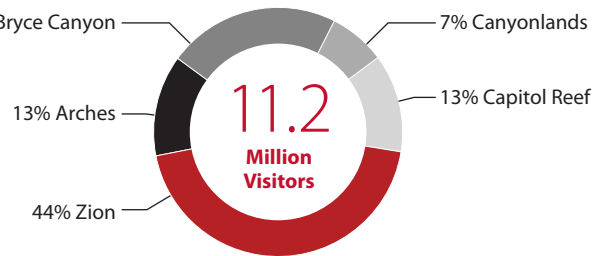
Four of Utah’s five national parks experienced year-over visitation growth in 2024 (Table 3 and Figure 20). Arches National Park was the only park to receive fewer visitors in 2024 than in 2023, with visitation down 1.0%. Zion National Park had the greatest share of national park visitors, followed by Bryce Canyon and Arches. In terms of visitor numbers, Zion had the largest year-over increase with over 300,000 more visitors in 2024 than in 2023.

Table 3: Utah National Park Recreation Visitation by Park, 2023-2024

Utah National Parks	2023	2024	2023-2024
Arches	1,482,045	1,466,528	-1.0%
Bryce Canyon	2,461,269	2,498,075	1.5%
Canyonlands	800,322	818,492	2.3%
Capitol Reef	1,268,861	1,422,490	12.1%
Zion	4,623,238	4,946,592	7.0%
Total National Park Visitors	10,635,735	11,152,177	4.9%

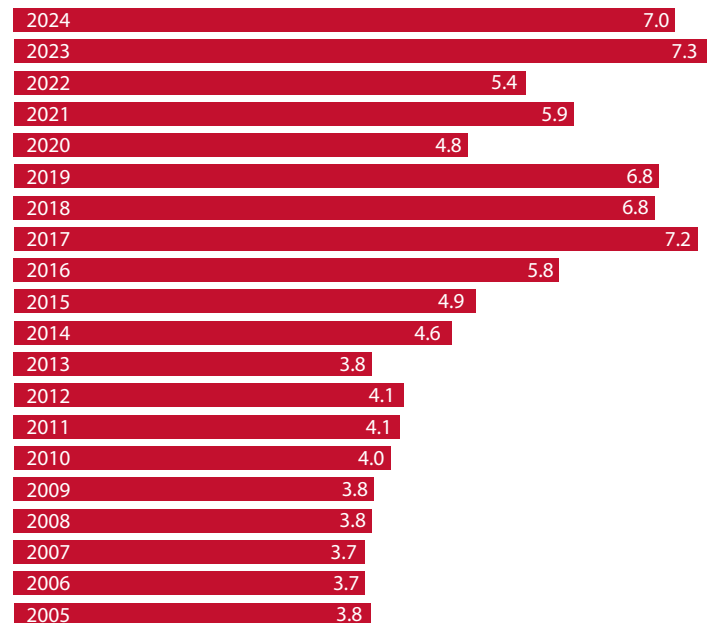
Source: Kem C. Gardner Policy Institute analysis of National Park Service data

Figure 20: Visitation Share by National Park, 2024



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

Figure 21: Utah National Place Recreation Visitation, 2005-2024
(Millions of Visitors)



Note: Visitor counts for Ashley Karst NPGA, Bears Ears NM, Flaming Gorge NRA, Jurassic NM, and Rainbow Bridge NM are not included.

Source: National Park Service and Bureau of Land Management

Visitation to Utah's national places declined 4.8% in 2024, following record visitation in 2023 (Table 4 and Figure 21). Cedar Breaks National Monument (NM) reported the greatest year-over growth (17.7%) and increase in number of visitors (108,500). Grand Staircase-Escalante NM and Golden Spike National Historic Park (NHP) reported more modest visitation increases (4.8% and 4.3%, respectively). Five of Utah's national places reported a decline in visitation, including Dinosaur NM, Glen Canyon National Recreation Area (NRA), Hovenweep NM, Natural Bridges NM, and Timpanogos NM. Ashley Karst National Recreation and Geologic Area (NRGA), Bears Ears NM, Flaming Gorge NRA, and Rainbow Bridge NM visitors counts are not available.

State Park Visitation

Forty-four of Utah's 46 state parks track monthly and annual visitation. These 44 state parks reported a record 13.0 million combined visitors in 2024, with yearly visits up 7.5% from the previous year (Table 5). Notably, Utah state parks have experienced record visitation in eight of the past 10 years. Sand Hollow, Dead Horse Point, and Antelope Island welcomed the most annual visitors with over a million at each park. Lost Creek, Territorial Statehouse, Escalante Petrified Forest, and Great Salt Lake Marina state parks experienced the highest year-over-percent visitation increases (+50%). Conversely, Anasazi Indian Village, Red Fleet, Gunlock, and Utah Lake experienced the largest year-over-percent decreases. Wasatch Mountain had the largest increase in number of visitors (122,000 in 2024), while Gunlock reported 103,000 fewer visitors than the prior year.

While state park visitation rapidly climbed in recent years, national park visitation moderated (Figure 22). National park visitation's annualized rate of change from 2015 to 2024 was 2.8%, while state parks visitation increased at nearly five times that rate (13.7%).

Table 4: Utah National Place Recreation Visitation by Site, 2023–2024

Utah National Places	2023	2024	2023-2024
Cedar Breaks NM	614,292	722,834	17.7%
Dinosaur NM	326,529	322,113	-1.4%
Glen Canyon NRA	5,206,934	4,725,610	-9.2%
Golden Spike NHP	53,015	55,287	4.3%
Grand Staircase–Escalante NM	892,499	935,628	4.8%
Hovenweep NM	35,231	31,473	-10.7%
Natural Bridges NM	83,760	75,680	-9.6%
Timpanogos NM	120,656	114,034	-5.5%
Total National Place Visits	7,332,916	6,982,659	-4.8%

Note: NM = National Monument, NRA = National Recreation Area, NHP = National Historic Park. Visitor counts for Bears Ears NM, Flaming Gorge NRA, and Rainbow Bridge NM are not included.

Source: National Park Service and Bureau of Land Management

Table 5: Utah State Park Visitation by Park, 2023–2024

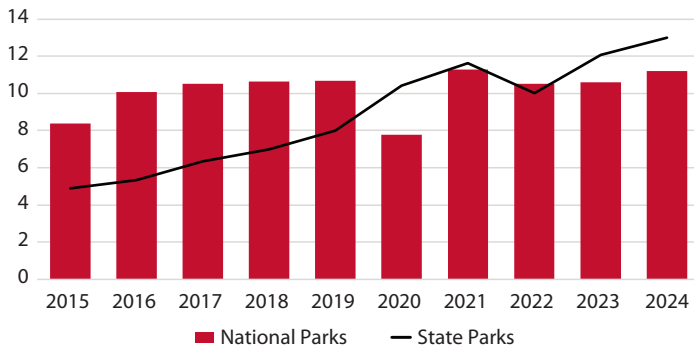
Utah State Park	2023	2024	2023-2024
Anasazi Indian Village State Park	19,950	787	-96.1%
Antelope Island State Park	936,147	1,047,499	11.9%
Bear Lake State Park	569,903	665,667	16.8%
Camp Floyd - Stage Coach Inn State Park	12,240	11,683	-4.6%
Coral Pink Sand Dunes State Park	229,004	307,823	34.4%
Dead Horse Point State Park	1,080,536	1,140,267	5.5%
Deer Creek State Park	702,504	702,398	-0.0%
East Canyon State Park	232,674	244,207	5.0%
Echo State Park	133,435	131,692	-1.3%
Edge Of The Cedars State Park	13,616	13,301	-2.3%
Escalante Petrified Forest State Park	90,822	147,720	62.6%
Fred Hayes State Park at Starvation	153,539	158,248	3.1%
Fremont Indian State Park	51,605	46,260	-10.4%
Frontier State Park	15,289	14,555	-4.8%
Goblin Valley State Park	398,961	503,676	26.2%
Goosenecks State Park	56,368	61,028	8.3%
Great Salt Lake Marina State Park	169,376	268,651	58.6%
Green River State Park	90,002	113,197	25.8%
Gunlock State Park	269,604	165,979	-38.4%
Huntington State Park	42,125	40,850	-3.0%
Hyrum State Park	152,787	146,026	-4.4%
Jordan River OHV State Park	113,728	108,528	-4.6%
Jordanelle State Park	829,945	916,404	10.4%
Kodachrome Basin State Park	152,777	184,139	20.5%
Lost Creek State Park	13,382	25,462	90.3%
Millsite State Park	23,829	26,189	9.9%
Otter Creek State Park	47,820	52,522	9.8%
Palisade State Park	257,874	274,715	6.5%
Piute State Park	1,321	1,864	41.1%
Point of the Mountain Sky Park	3,828	3,837	0.2%
Quail Creek State Park	336,675	368,835	9.6%
Red Fleet State Park	14,009	6,296	-55.1%
Rockport State Park	206,575	196,258	-5.0%
Sand Hollow State Park	1,415,555	1,530,337	8.1%
Scofield State Park	45,497	47,550	4.5%
Snow Canyon State Park	954,572	994,796	4.2%
Steinaker State Park	79,300	94,449	19.1%
Territorial Statehouse State Park	9,519	17,296	81.7%
Utah Field House Of Natural History State Park	60,704	72,355	19.2%
Utah Lake State Park	342,886	296,201	-13.6%
Utah Raptor State Park	17,570	25,688	46.2%
Wasatch Mountain State Park	678,082	800,135	18.0%
Willard Bay State Park	880,332	818,539	-7.0%
Yuba State Park	152,987	174,584	14.1%
Total	12,059,254	12,968,493	7.5%

Note: Historic Union Pacific Rail Trail and This is the Place Heritage Park visitor counts are not included; year-over declines in visitation can often be the result of park construction projects that hampered visitation.

Source: Utah State Parks

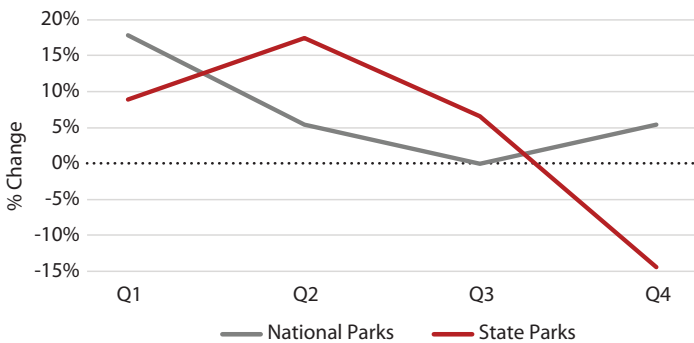
Figure 22: National Park and State Park Visitation, 2015–2024

(In Millions of Visitors)



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

Figure 23: Year-over Percent Change in Utah National Park & State Park Visitation by Quarter, 2024



Note: Q1 = Jan, Feb, Mar; Q2 = Apr, May, Jun; Q3 = Jul, Aug, Sept; Q4 = Oct, Nov, Dec.
Source: Kem C. Gardner Policy Institute analysis of National Park Service and Utah State Parks data

In 2024, Utah's national and state parks showed slightly different patterns in quarterly year-over-year visitation trends. During the first two quarters, both national and state parks saw increased visitation compared to 2023. However, over the summer, national park visits held steady year-over-year, while state park visits rose by 6%. In contrast, there was a 14% decline in state park visitation in the fall, while national park visitation increased by 5%.

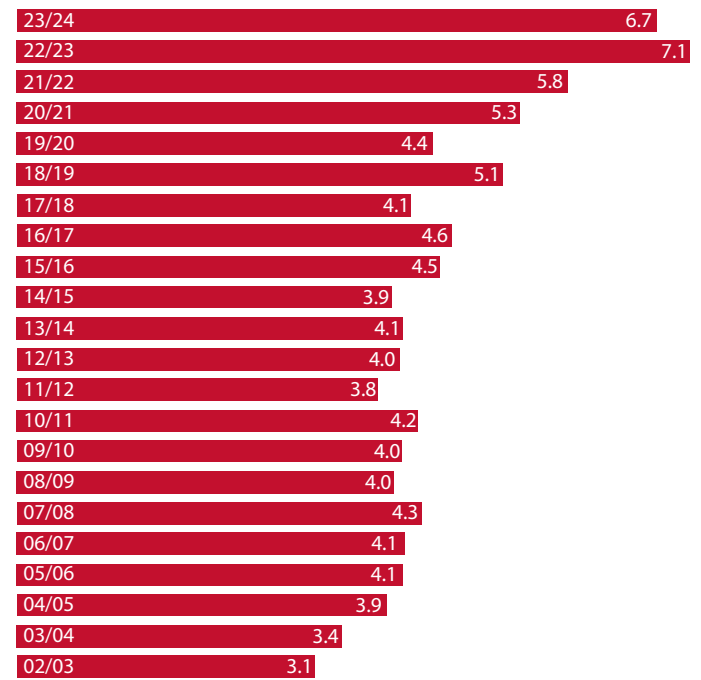
Ski Industry

According to the U.S. Bureau of Economic Analysis, Utah ranked 3rd in the nation for winter sports in 2023, and seven of Utah's 15 ski resorts are top-ranked in the Western United States. Utah's ski industry reported 6.7 million skier days and a record \$2.67 billion in skier spending during the 2023-2024 ski season (Figures 24 and 25). RRC Associates data show Utah skier days dropped 4.9% from the previous season, yet nominal skier spending (not adjusted for inflation) increased 1.1% (Figure 25).

Per capita skier expenditures increased 19.0%, with an average per-capita spend of \$445 in the 2023-2024 ski season

Figure 24: Utah Skier Days, 2002/03–2023/24

(Millions of Skier Days)



Source: Ski Utah

compared with \$374 in the previous year. RRC found that short-term rentals were the most common lodging choice of Utah skiers/snowboarders (33.0%), followed by traditional commercial lodging (30.0%), and staying with friends or family (17.0%) (Figure 26). The average length of stay for skiers and snowboarders remained at 6.2 nights.

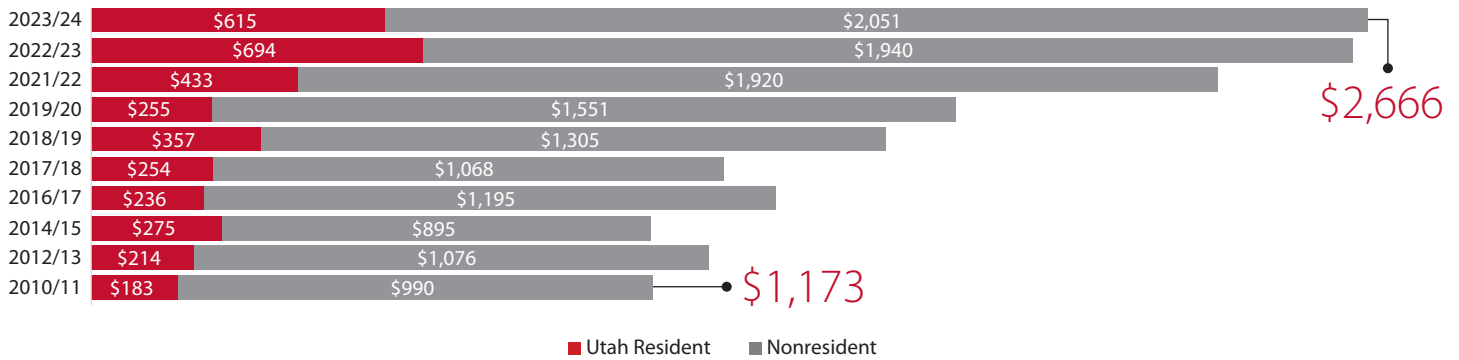
Utah residents accounted for most of Utah's ski visitors, with significant portions of nonresident visitors from California, New York, and Florida. The share of international skiers remained around 2%, which is still below the pre-pandemic share (4.2% in 2019-2020) indicating that international ski travel has not fully recovered from the pandemic.

Ski magazine named Utah's Snowbasin Resort the top ski resort in the West for its terrain, lodges, and customer service among other categories. Alta Ski Area and Solitude Mountain Resort also ranked in the West's top 10 (5th and 8th, respectively), while Snowbird, Deer Valley Resort, Brighton Resort, and Park City Mountain Resort claimed spots in the top 30.

While 2024-2025 ski season numbers are not yet available, the ski season experienced a seasonal worker strike at Park City Mountain Resort and lower-than-normal snow totals as of late January 2025. On December 27, 2024, the Park City Professional Ski Patrol Association went on strike asking for a pay increase and enhanced employment benefits. Due to the strike, Park City Ski Resort operated at a reduced capacity during the winter holiday, which prompted negative publicity. The strike ended January 9, 2025, when the Park City Mountain Resort owner (Vail Resorts) and the Park City ski patrol reached an agreement.

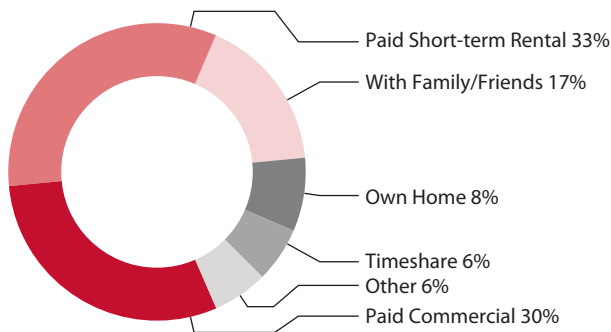
Figure 25: Utah Skier/Snowboarder Spending, 2010/11-2023/24

(In Millions of 2024 Dollars)



Note: Biennial RRC changed from biennial to annual research beginning in 2016/17; research halted in 2020/21 due to the COVID-19 pandemic.
Source: Kem C. Gardner Policy Institute analysis of RRC Associates data

Figure 26: Skier/Snowboarder Accommodations Share by Lodging Type, 2023/24 Season



Source: RRC Associates

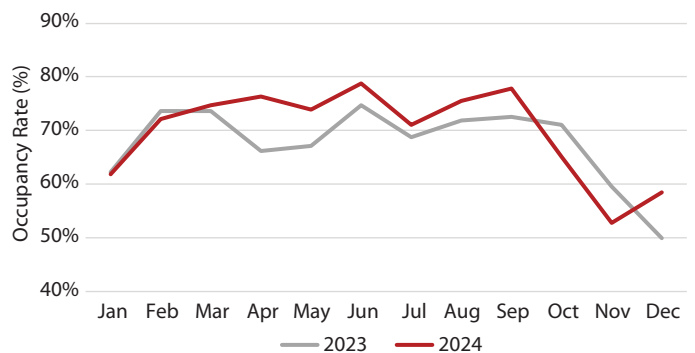
Conferences and Conventions

Urban travel to Salt Lake City made a complete post-pandemic rebound in 2024. Downtown Salt Lake City’s hotel occupancy rose from 67.6% in 2023 to 71.5% in 2024, with higher year-over rates eight months out of the year (Figure 27). While Salt Lake City’s 2024 average daily room rate (\$172.01) remained somewhat flat compared to 2023 (\$170.50), RevPAR increased 6.5%. Salt Lake County also experienced year-over increases in occupancy, ADR, and RevPAR. Conversely, the other three Wasatch Front counties—Davis, Utah, and Weber—experienced year-over ADR increases, but declines in occupancy and flat RevPARs.

Visit Salt Lake’s 2023 annual report revealed that Salt Lake County’s conference and convention sector surpassed its objectives for the year. The achievement included booking 663,700 hotel room nights, exceeding its goal by 5.0%. The cumulative count of convention delegates, show and meeting attendees, and visitors to sporting and special events reached nearly 645,000, contributing an estimated \$350.4 million to Salt Lake County’s economy.

Visit Salt Lake launched Sports Salt Lake (SSL) in January 2021 to expand sports business in the growing sports tourism market

Figure 27: Downtown Salt Lake City Hotel Occupancy, 2023 and 2024

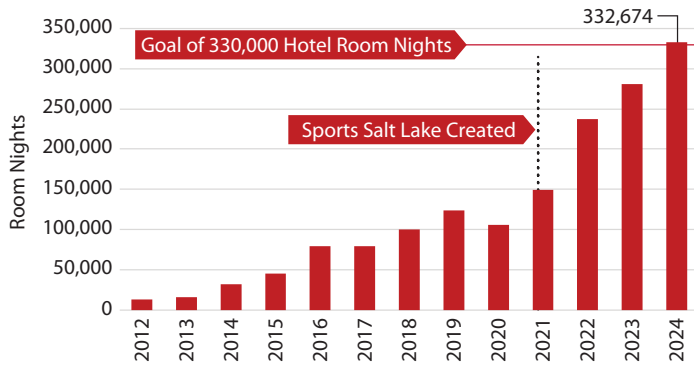


Source: Kem C. Gardner Policy Institute analysis of STR, Inc., data. Republication or other re-use of this data without the express written permission of STR is strictly prohibited.

and foster networking and collaboration within the local community. Along with promoting Utah’s sporting venues, SSL provides support services and assistance to sporting events in the city. The success of SSL was recognized when Salt Lake City won “Best Host City” by *Sports Travel* in 2023. Attendance at the city’s annual Sports Tourism Summit also continues to grow. Salt Lake City hotel room nights grew to over 330,000 in 2024, a significant increase from the pre-pandemic high of around 125,000 (Figure 28).

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. Half of the CTAA revenue will support the promotion of overnight visits, and one-third will support region-specific visitor economy improvement activities. In general, revenue supports (or funds) Salt Lake County’s efforts to attract large conferences, conventions, and sporting events and long-term tourism growth. The 2023 \$11 million increase in the Tourism, Recreation, Cultural, and Convention (TRCC) Fund is partly due to the new Salt Lake County CTAA revenue stream.

Figure 28: Salt Lake Sports Market: History of Hotel Room Night Production, 2012-2024



Note: Sports Salt Lake is a Division of Visit Salt Lake.
Source: Sports Salt Lake

Salt Lake City also approved a Sports, Entertainment, Culture, and Convention (SECC) District in 2024, supporting Smith Entertainment Group’s proposal to allocate a 0.5% sales tax increase to fund the SECC district’s revitalization. Public benefits will include the revitalization of the Delta Center, historic Japantown, public art financing, affordable and family-sized housing, and workforce development.

Sundance Film Festival

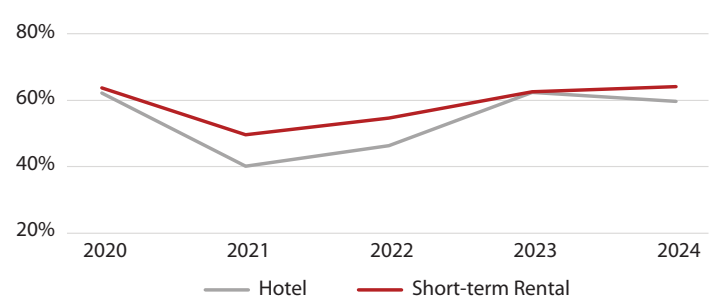
Although 2024 marked the 40th anniversary of the Sundance Film Festival in Park City, 2026 will be the festival’s final year in Utah. In September 2023, the Sundance Institute announced three finalists for hosting the film festival in 2027 and beyond. The selected cities included Boulder, Colorado; Cincinnati, Ohio; and Salt Lake City/Park City, Utah. On March 27, 2025, the Sundance Institute announced that it had selected Boulder, Colorado as the new host of the Sundance Film Festival from 2027 to 2036.

Losing the Sundance Film Festival will impact Summit County’s winter tourism economy. According to Y² Analytics’ 2024 Sundance Film Festival economic impact report, 72,840 people attended the festival in January 2024, and one-third of attendees were nonresidents. These out-of-state visitors spent an estimated \$106.4 million in Utah during the 10-day festival. The Sundance Film Festival supported 1,730 jobs and generated \$13.8 million in state and local tax revenue, \$69.7 million in Utah wages, and \$132 million in Utah gross domestic product.

Figure 29 illustrates the Sundance Film Festival’s influence on Summit County hotel and short-term rental occupancy rates from 2020 to 2024.

The average Summit County hotel occupancy rate for the first week of the 2020 in-person festival (pre-COVID) was 62.2%. Post-pandemic, hotel occupancy rates dropped for a few years before rebounding in 2023. Summit County’s short-term rental data demonstrate a similar trend. Short-term rental occupancy during the first week of the 2020 in-person film festival was

Figure 29: Summit County Hotel & Short-term Rental Occupancy Rates during the Sundance Film Festival, 2020-2024



Note: Occupancy rates include an average of the first seven days of the film festival; in January 2020, the festival took place in person prior to the COVID-19 pandemic. Source: Kem C. Gardner Policy Institute analysis of Lighthouse and STR, Inc., data. Republication or other re-use of this data without the express written permission of STR is strictly prohibited.

63.7%, followed by 49.6% and 54.6% in subsequent years. In January 2024, short-term rental occupancy rates rebounded to pre-pandemic levels (64.0%). Summit County’s short-term rental inventory grew 35.0% from 2020 to 2024.

Travel and Tourism Employment

Utah’s travel and tourism sector generated a record 103,800 direct jobs in 2023. The industry’s economic impact supported an additional 56,000 jobs through indirect and induced effects (Figure 30).

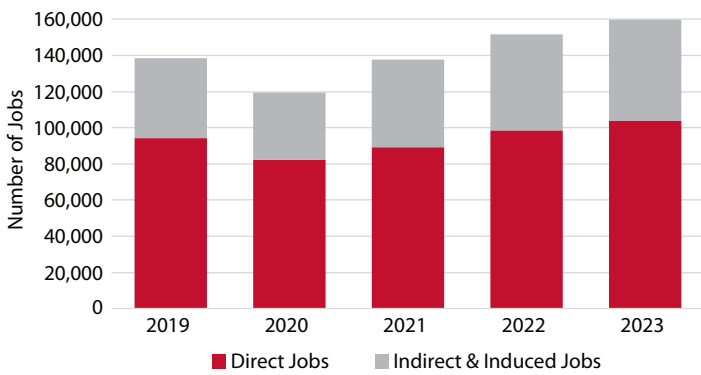
Utah’s tourism-related private industries with the most significant year-over percent increases in employment were Auto/RV leasing (12.0%), air transportation (11.5%), and performing arts (10.1%) (Figure 31). The industries that added the greatest number of jobs in 2023 included foodservice (7,100), performing arts (2,000), and accommodations (1,600). Conversely, retail and travel arrangements and reservation services experienced the most significant year-over job losses (-3,800 jobs combined).

As for shares of tourism jobs, one in four jobs was in the foodservice sector while arts, entertainment, and recreation, air travel and public transportation, and accommodations each constituted equal shares at around 20% (Figure 32).

Private leisure and hospitality employment grew in every county throughout Utah in 2023, except for the eight counties of Piute, Millard, Emery, Daggett, Wayne, Uintah, Garfield, and Carbon (Figure 33). Millard and Uintah counties experienced the most significant year-over decline in leisure and hospitality jobs, each with a year-over decrease of around 30 jobs. Salt Lake, Utah, and Davis were the three counties that contributed the most to the increase in leisure and hospitality jobs statewide.

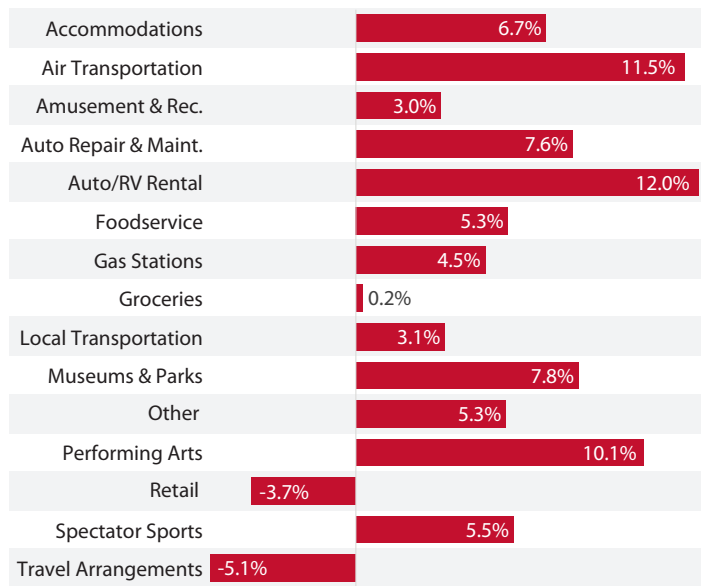
The 2024 leisure and hospitality employment numbers (which lag several months) are expected to remain flat along with several of Utah’s other major job sectors like professional and business services, manufacturing, and financial activity (Figure 34).

Figure 30: Utah Travel and Tourism Jobs, 2019-2023



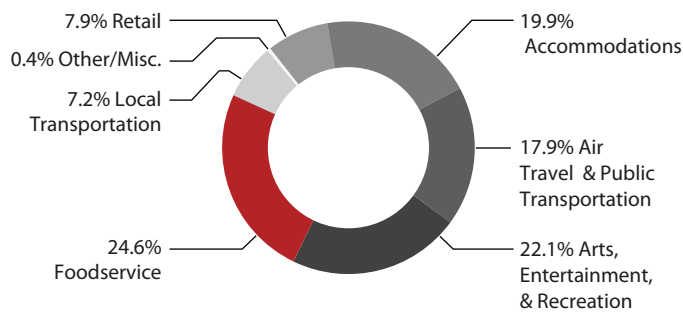
Note: Includes public and private full- and part-time jobs, and self-employed.
 Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics and U.S. Bureau of Economic Analyses data

Figure 31: Year-over Change in Private Tourism Jobs by Industry, 2023



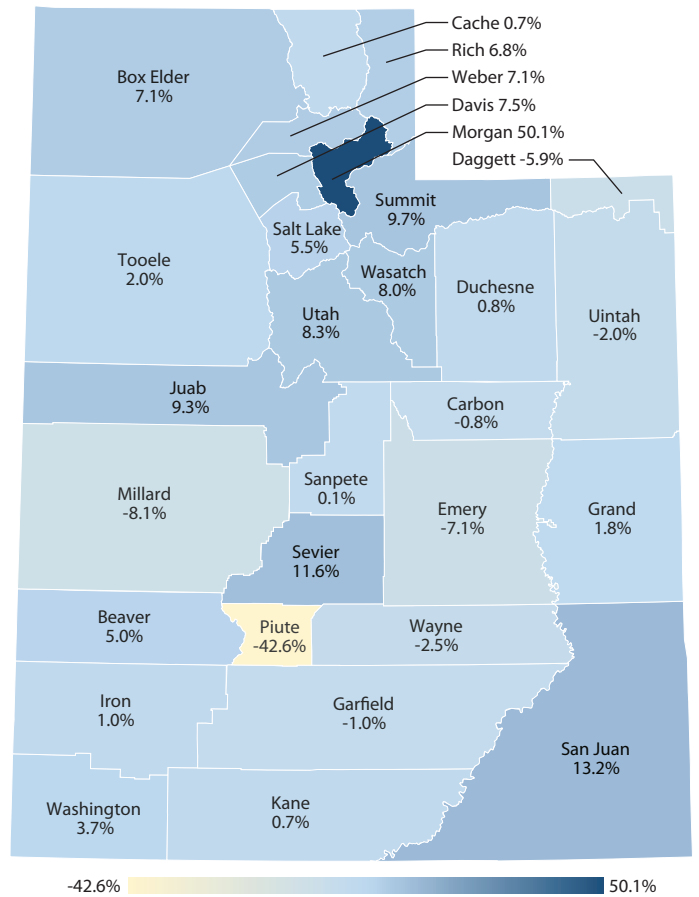
Note: Includes private full- and part-time jobs; self-employed are not included.
 Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics and U.S. Bureau of Economic Analyses data

Figure 32: Travel & Tourism Employment Shares by Sector, 2023



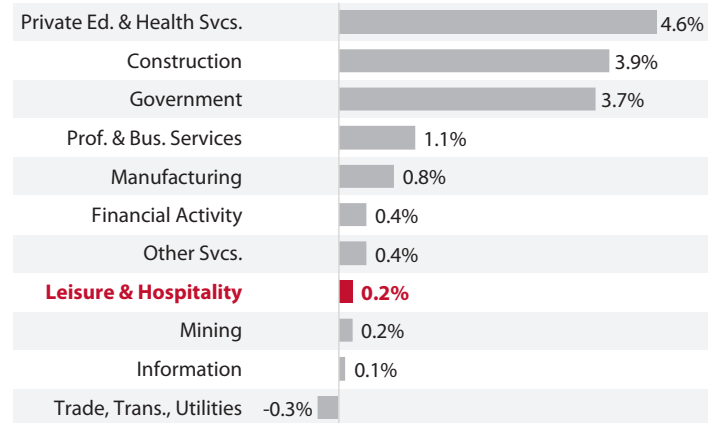
Note: Includes 103,800 direct private and public jobs and proprietors.
 Local Transportation sector includes car and RV rental, auto repair, and parking lots.
 Retail sector includes grocery stores and gas stations.
 Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics and U.S. Bureau of Economic Analysis data

Figure 33: Year-over Change in Private Leisure & Hospitality Jobs, 2023



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

Figure 34: Year-over Change in Utah Employment by Major Sector, 2024e



Note: "e" is "estimate"
 Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics data

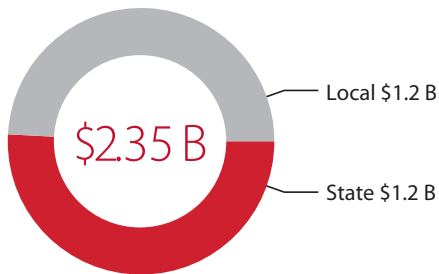
Tax Revenue

The \$12.71 billion in direct visitor spending in 2023 led to an estimated \$1.90 billion in direct state and local tax revenue and totaled \$2.35 billion with the inclusion of indirect and induced tax revenue (Figure 35).

As of October 2024, 21 of Utah's 29 counties experienced positive year-over growth in county transient room tax (County TRT) revenue. Salt Lake County had the greatest increase in year-over TRT revenue, followed by Washington County and Summit County (Figure 36).

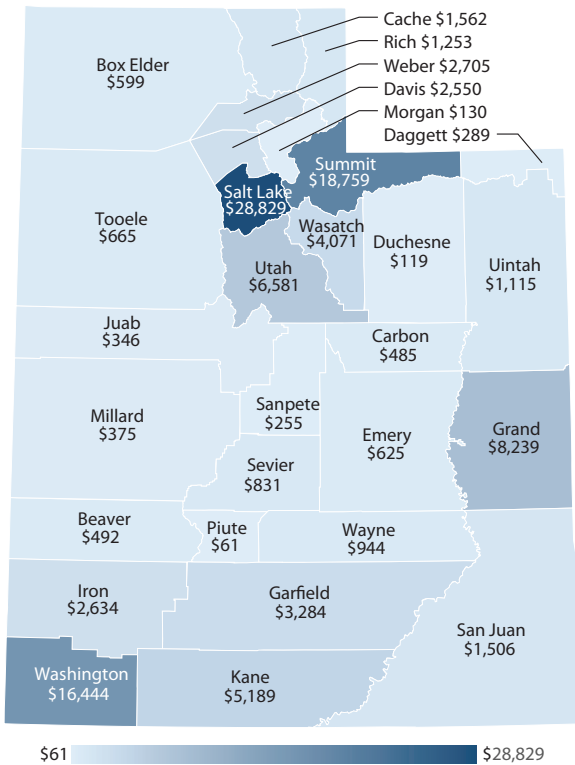
While Utah's more populous counties collected the most County TRT revenue in 2024, Utah's rural counties, including Grand, Garfield, Kane, Rich, and Summit, had the highest County TRT revenue per household (Figures 37 and 38).

Figure 35: Total Travel and Tourism-Generated Tax Revenue, 2023



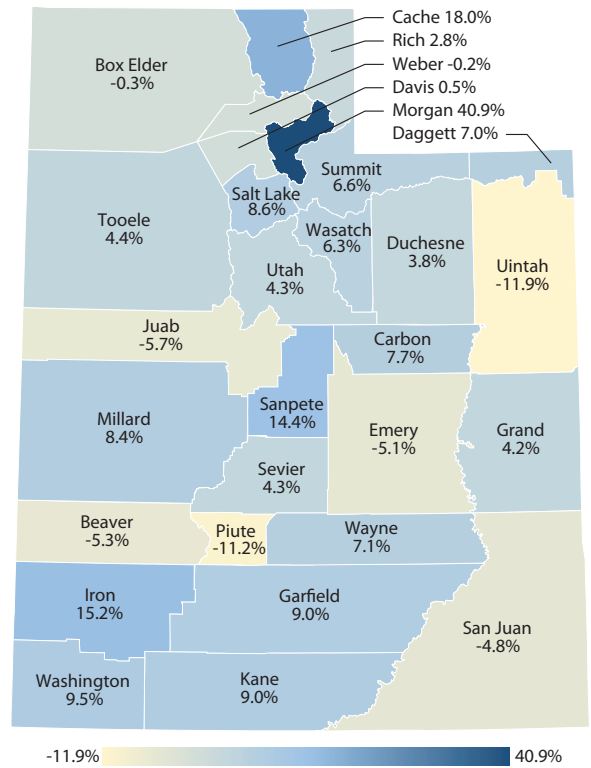
Note: Includes economic multiplier effects.
Source: Kem C. Gardner Policy Institute analysis of Tourism Economics and Utah State Tax Commission data

Figure 37: Transient Room Tax Revenue by County, 2024
(In Thousands of Dollars)



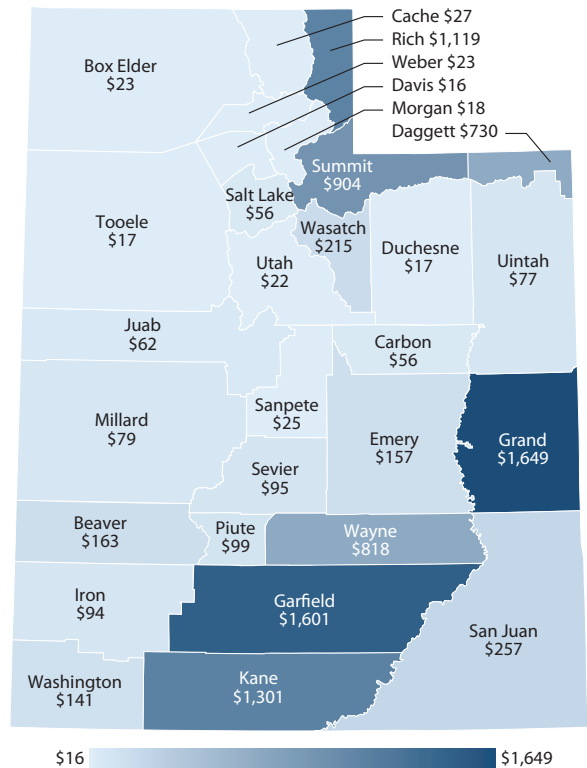
Note: County transient room tax (TRT) revenue only; does not include municipal TRT.
Source: Kem C. Gardner Policy Institute analysis of Utah State Tax Commission data

Figure 36: Year-over Change in Transient Room Tax Revenue by County, 2024



Note: County transient room tax (TRT) revenue only; does not include municipal TRT.
Source: Kem C. Gardner Policy Institute analysis of Utah State Tax Commission data

Figure 38: Transient Room Tax Revenue Per Household, 2024



Note: County transient room tax (TRT) revenue only; does not include municipal TRT.
Source: Kem C. Gardner Policy Institute analysis of Utah State Tax Commission and U.S. Census Bureau data

Hotel Occupancy, Rates, and Capacity

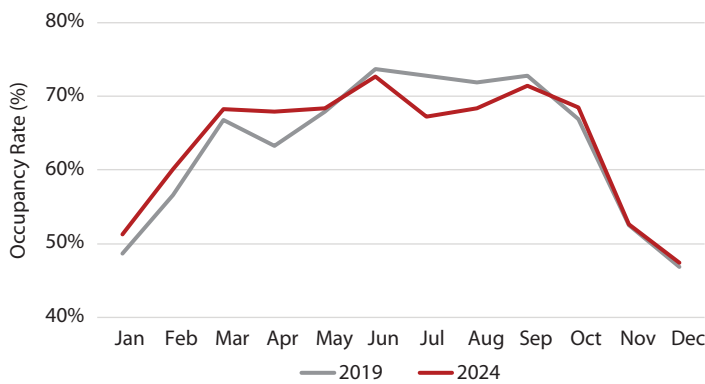
Utah’s average annual hotel occupancy rate in 2024 (63.7%) fell from 64.1% in 2023. Hotel occupancy rates peaked in June, September, and October. Compared to pre-pandemic 2019 occupancy trends, 2024 occupancy was higher in winter and spring, lower in summer, and followed a similar downward trend from September through December (Figure 39).

Statewide, Salt Lake County had the highest average hotel occupancy rate at 69.9% in 2024, while Wasatch County recorded the lowest at 47.1%. Compared with 2023, Garfield, San Juan, and Wayne counties (combined) experienced the most significant increase in occupancy rates, followed by Iron and Beaver counties (Figure 40). Conversely, Millard and Juab counties (combined) experienced the most notable decline in occupancy rates, followed by Uintah and Wasatch counties.

Utah hotel average daily rates (ADRs) increased 4.0% in 2024. Wasatch County reported the highest average annual ADR of \$419, down from \$446 in 2023, while Tooele County had the lowest at \$102 (Figure 41). Among the 24 counties reporting ADRs, 22 observed year-over increases (Figure 42). Emery County had the most significant year-over increase at 17.5%, followed by Garfield, San Juan, and Wayne counties (combined) with a 15.0% increase. In terms of absolute value, the largest ADR increase occurred in Emery County, where the average annual ADR rose \$18 per nightly hotel stay from 2023 to 2024.

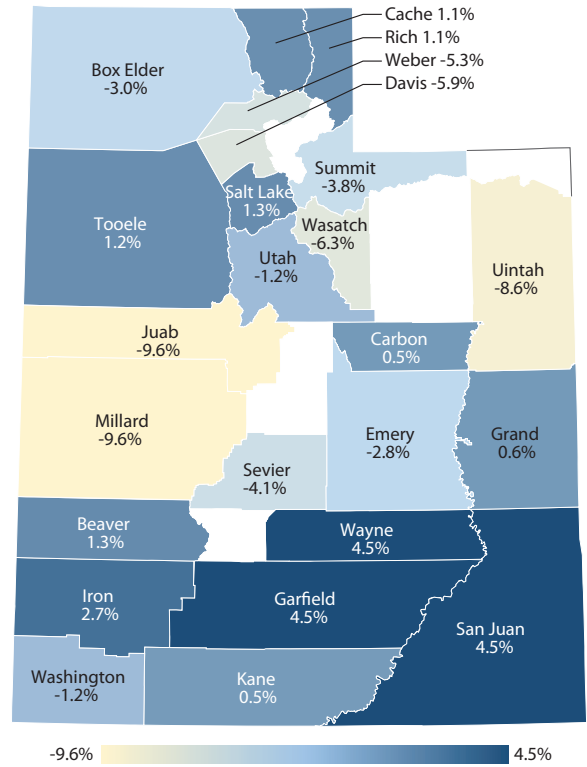
As for hotel room capacity changes, Summit County reported a 7.7% year-over increase in hotel rooms, followed by Wasatch County with a 6.8% increase in hotel room capacity (Figure 43). Of the 24 reporting counties, 10 reported a hotel capacity increase of 2.0% or more. Summit County experienced the most significant increase in average annual hotel rooms, followed by Salt Lake County and Washington County.

Figure 39: Statewide Hotel Occupancy, 2024 vs. 2019 Baseline



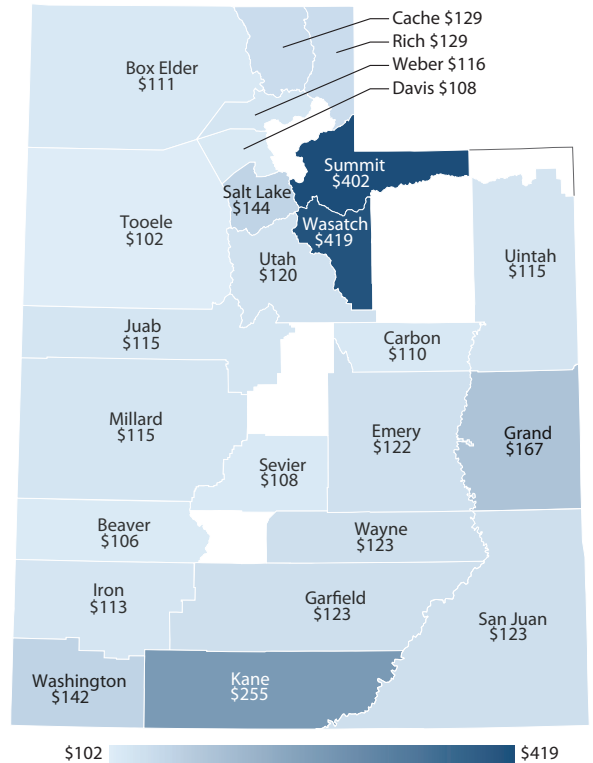
Source: Kem C. Gardner Policy Institute analysis of STR, Inc. data. Republication or other re-use of this data without the express written permission of STR is strictly prohibited.

Figure 40: Year-over Change in Hotel Occupancy Rate by County, 2024



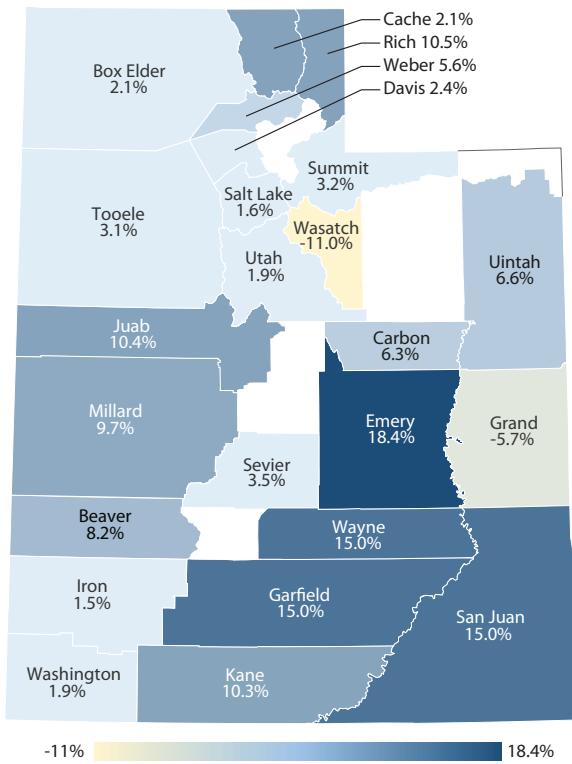
Note: No data exists for counties shaded white. Source: Kem C. Gardner Policy Institute analysis of STR, Inc. data. Republication or other re-use of this data without the express written permission of STR is strictly prohibited.

Figure 41: Average Daily Room Rate (ADR) by County, 2024



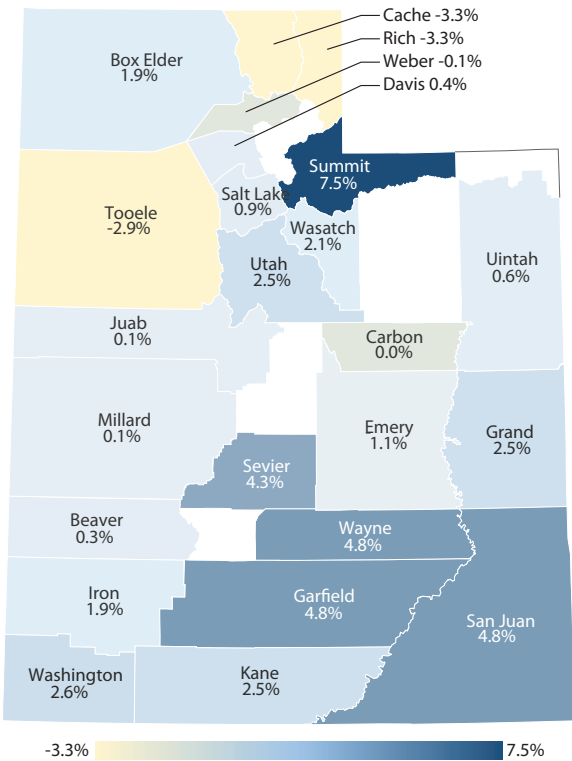
Note: No data exists for counties shaded white. Source: Kem C. Gardner Policy Institute analysis of STR, Inc. data. Republication or other re-use of this data without the express written permission of STR is strictly prohibited.

Figure 42: Year-over Change in ADR by County, 2024



Note: No data exists for counties shaded white.
 Source: Kem C. Gardner Policy Institute analysis of STR, Inc. data. Republication or other re-use of this data without the express written permission of STR is strictly prohibited.

Figure 43: Year-over Change in Hotel Capacity by County, 2024



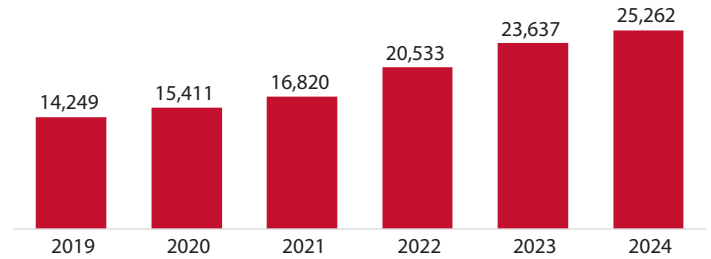
Note: No data exists for counties shaded white.
 Source: Kem C. Gardner Policy Institute analysis of STR, Inc. data. Republication or other re-use of this data without the express written permission of STR is strictly prohibited.

Short-term Rentals

According to Lighthouse, a research firm specializing in short-term rentals, there was an average of 14,249 available short-term rental listings statewide in 2019 and 25,262 in 2024 (Figure 44). This represents a 77.3% increase over the six years, with an annual growth rate of 12.9%. Figure 45 illustrates the percentage change in short-term rental listings by county from 2023 to 2024, while Figure 46 shows the year-over change in the number of unique short-term rental listings by county for the same period. The number of short-term rental listings increased from 2023 to 2024 in every county in Utah except for Duchesne and Uintah counties (Figure 46).

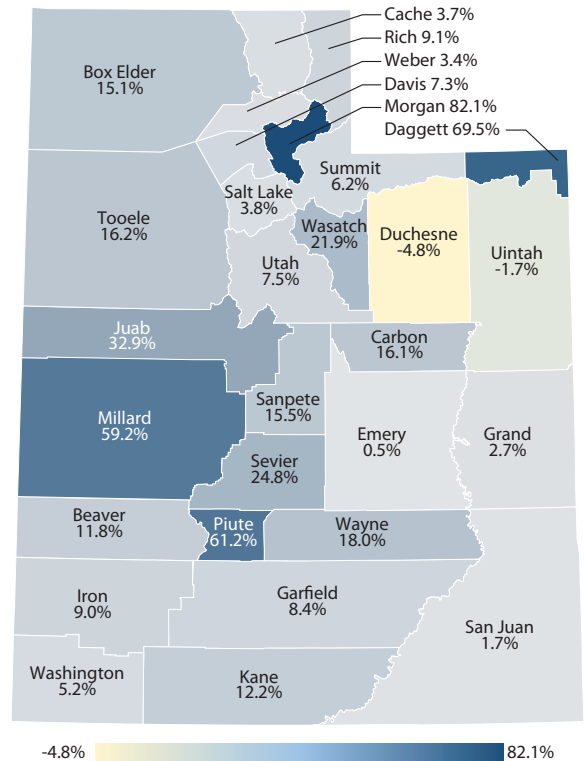
Figure 44: Utah's Short-term Rental Supply, 2019-2024

(Number of Available Listings)



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

Figure 45: Year-over Change in Short-term Rental Listings, 2024



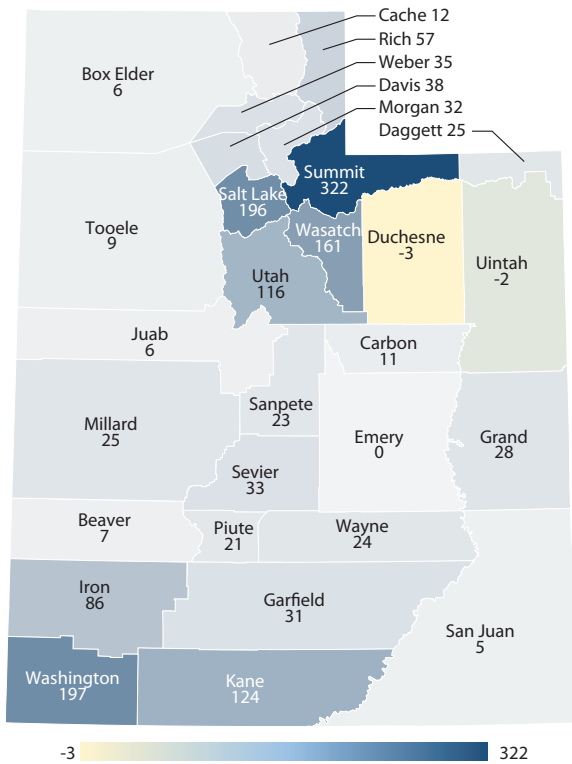
Note: Includes Airbnb, HomeAway, and VRBO rentals; listing type "Shared Room" has been omitted.
 Source: Kem C. Gardner Policy Institute analysis of Lighthouse data

In contrast, hotel room capacity experienced a slower annual growth rate of 0.7% from 2023 to 2024. Despite the continued—though decelerating—increase in short-term rental capacity, short-term rental occupancy increased in every quarter of 2024, while hotel occupancy was down in quarters one, three, and four (Figures 47 and 48).

Travel and Tourism Industry – Other Indicators

Jobs and wages in Utah's air travel and leisure and hospitality sectors grew in 2023 (Tables 6-9).

Figure 46: Year-over Change in Number of Short-term Rental Listings, 2024



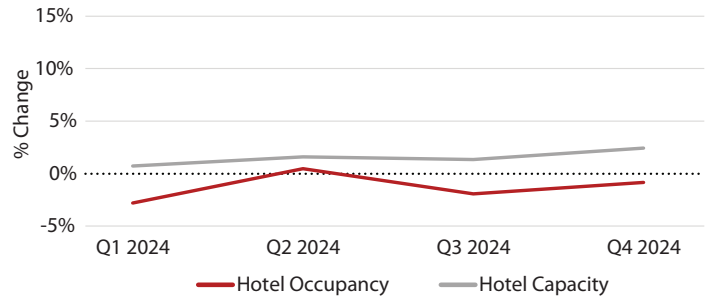
Note: Includes Airbnb, HomeAway, and VRBO rentals; listing type "Shared Room" has been omitted.
Source: Kem C. Gardner Policy Institute analysis of Lighthouse data

Table 6: Utah's Passenger Air Industry, 2019-2023

Year	Total Passengers	Annual Change	Emp.	Annual Change	Wages (Millions)	Annual Change
2019	26,808,014	5.0%	7,236	8.3%	\$707	16.9%
2020	12,559,026	-53.2%	6,418	-11.3%	\$674	-4.7%
2021	22,378,989	78.5%	7,060	10.0%	\$606	-9.0%
2022	25,752,783	15.1%	8,228	16.5%	\$726	19.8%
2023	26,952,752	4.7%	9,180	11.6%	\$978	34.7%

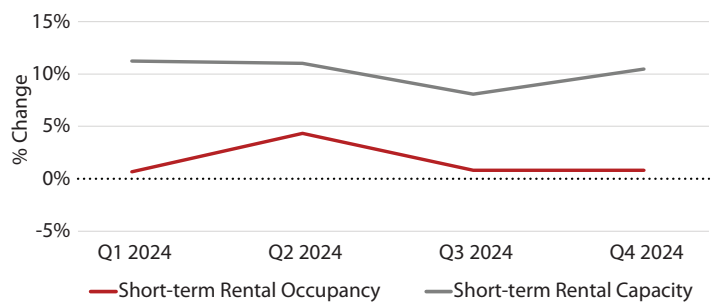
Note: Includes full- and part-time employment; does not include proprietors.
Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics and SLC International Airport data

Figure 47: Year-over Change in Hotel Occupancy Rates by Quarter, 2024



Source: Kem C. Gardner Policy Institute analysis of STR, Inc. data. Republication or other re-use of this data without the express written permission of STR is strictly prohibited.

Figure 48: Year-over Change in Short-term Rental Occupancy Rates by Quarter, 2024



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

Table 7: Utah's Arts, Entertainment, and Recreation Industry, 2022-2023

Year	2022	2023	2022-2023
Private Employment	28,176	30,511	8.3%
Private Wages (Millions)	\$997	\$1,045	4.8%
Public Employment	7,454	8,035	7.8%
Public Wages (Millions)	\$153	\$173	13.6%
Taxable Sales (Millions)	\$1,343	\$1,430	6.4%

Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics and Utah State Tax Commission data

Table 8: Utah's Accommodations Industry, 2022-2023

Year	2022	2023	2022-2023
Employment	20,924	22,360	6.9%
Wages (Millions)	\$720	\$808	12.1%
Taxable Sales (Millions)	\$3,127	\$3,365	7.6%

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 Food Services Industry, 2022-2023

Year	2022	2023	2022-2023
Employment	113,639	119,335	5.0%
Wages (Millions)	\$2,481	\$2,712	9.3%
Taxable Sales (Millions)	\$7,352	\$7,855	6.8%

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

Travel and Tourism – In the News

- **2034 Winter Olympic and Paralympic Games** – The International Olympic Committee (IOC) announced its selection of Utah as the future host of the 2034 Winter Games on July 24, 2024. The 2034 Winter Games have an operating budget of \$3.99 billion, but are expected to generate an estimated \$6.6 billion.* Although some infrastructure improvements will be funded through taxpayer dollars, the overall cost of the Games is intended to be covered by donations, ticket and merchandise sales and licensing, and IOC contributions.
- **Artificial Intelligence (AI)** – AI is becoming an increasingly important part of the travel and tourism industry. Travelers are utilizing AI to create custom travel itineraries, airports are implementing biometric screening technologies, and robotics (e.g., luggage transport, room service delivery, and cleaning), are replacing hospitality staff in select areas.
- **Air Travel** – In May 2024, President Biden signed the FAA Reauthorization Act to enhance the safety, sustainability, and accessibility of the U.S. aviation system. Airfare experienced its first decline since the pandemic in spring 2024, driven by increased airline capacity, the return to normal travel demand, growing competition from new low-cost carriers, and a small drop in jet fuel prices. The U.S. Travel Association continues to push for improvements in visa processing times, which it believes prevents millions of international visitors from traveling to the United States. Utah recently announced a partnership between the aerospace industry and an aircraft manufacturer to introduce air taxis, with plans to have them operational by the 2034 Winter Games.
- **Bleisure** – Business and corporate travel continued to grow post pandemic, largely driven by the rise of “bleisure”—a trend where business trips are extended with personal vacation days. This shift is fueled by a growing desire for work-life balance, more affordable accommodations, and the convenience of digital transportation. The U.S. Travel Association’s latest forecast suggests that business travel will fully recover and exceed pre-pandemic levels in 2026.
- **Gen Z Travelers** – According to a Bank of America online survey conducted in April 2024, the number of Gen Z travelers (age 18+, born after 1995) planning international trips, taking more vacations, extending their trips, and spending more on vacations surpassed older generations. Gen Z survey respondents reported strategies to save money, such as traveling during the shoulder season, using apps and

technology to compare prices, redeeming credit card points, or taking on side gigs to fund their travel. Notably, two in five Gen Z respondents said they would go into debt to travel.

- **Travel Trends** – The trend of combining leisure travel with events and volunteer work is growing in popularity. Sports tourism, music tourism, and voluntourism are examples where travelers blend attending sporting events, concerts, or volunteering with their leisure trips. Noctotourism—seeking destinations with dark skies for stargazing experiences—is also on the rise. Sustainable travel continues to gain traction as well as younger and more environmentally conscious travelers take trips. Amtrak recently announced an all-time ridership record in 2024 as more travelers choose carbon-friendly, slower modes of transportation like trains.

Travel and Tourism – Potential Costs

While this report highlights travel and tourism’s economic benefits, its coinciding costs and impacts must be noted and considered. Environmental degradation, increased automobile and foot traffic, pollution (air, water, light, and noise), and resource consumption can negatively impact natural habitats, wildlife, and local ecosystems. Overcrowding in popular destinations can also strain infrastructure, leading to traffic congestion, inadequate public services, and pressure on local waste management and emergency medical services. The costs of tourism can be balanced through strategic planning and effective visitor management, which helps ensure sustainable resource use, addresses burdens on local infrastructure, minimizes environmental impact, and maximizes economic benefits for local communities.

Research Methods

This section provides insight into 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

* See [Estimated Economic Impacts of the 2034 Olympic and Paralympic Winter Games \(2024\)](#) and [SLC-UT 2034 Winter Olympic Games Budget](#)

become common enough to warrant a new category. The travel and tourism industry is not one distinct industry but rather an assortment of industries, comprised of goods and services purchased before, during, and even after a trip. Because nonresident visitors purchase travel-related Utah goods and services, the travel and tourism industry is often characterized as an export industry.

- **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 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 industries (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 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 are when Utah visitors purchase from Utah businesses, including the purchases that support the employees and their earnings. These businesses purchase inputs from local companies, who may buy 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, etc.

Tourism Economics provided the Utah Office of Tourism with direct 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 2024 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, 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 assumes federal spending in the state is mainly independent of economic activity in Utah’s industries, including the travel and tourism-related industries.

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