

QUARTERLY PULSE

2025-Q4 of Utah's Tourism Industry

Statewide Trends

The Quarterly Pulse of Utah's Tourism Industry captures timely, on-the-ground perspectives from tourism professionals statewide. Each quarter, industry participants complete a short online survey covering recent visitation and revenue trends, staffing and labor conditions, and expectations for the next quarter, complemented by open-ended "pulse check" responses on emerging issues.

2025 Quarter 4 Response

The 2025 Quarter 4 Quarterly Pulse survey received 137 responses from 25 of Utah's 29 counties, with strong participation from Garfield, Davis, and Grand Counties (15 responses each). Input spanned key tourism segments, led by lodging (23), destination marketing organizations (21), and outfitter & guiding businesses (15), with additional representation from food & beverage (9) and arts & culture (6). This breadth provides a statewide snapshot of operating conditions and near-term expectations.

Changes in Visitation and Gross Revenues

Across Utah, respondents reported softer conditions in 2025-Q4 (Fig. 1). Compared with both 2025-Q3 and 2024-Q4, more businesses indicated declines in visitor/customer volume and gross revenues than increases, suggesting a broad-based cooling in demand.

Changes by Visitor Origin

Respondents most frequently attributed the slowdown to weakening nonresident demand (Fig. 2). International visitation declined for a majority of operators (59% quarter-over-quarter), and more than one-third reported decreases in out-of-state visitors (38%).

Staffing and Workforce Conditions

Workforce constraints remained significant in 2025-Q4 (Fig. 3). Over two in five respondents (41%) reported staffing struggles, even amid softer demand. Employment experiences were led by increased labor costs (27%) and difficulty finding seasonal workers (23%), with additional challenges tied to retention (13%) and reduced hours due to shortages (10%) (Fig. 4).

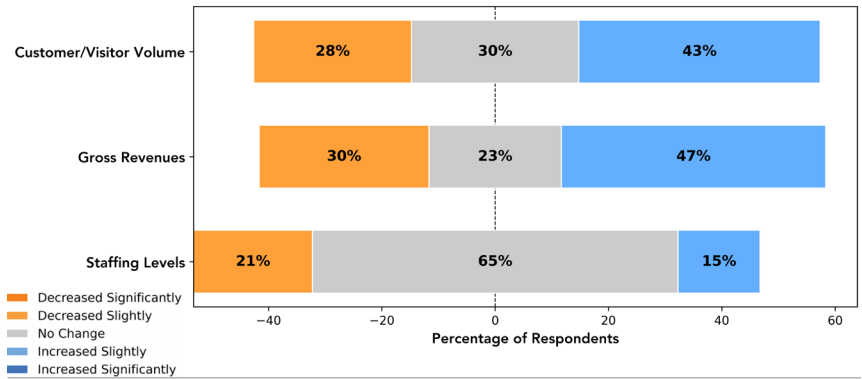


Fig. 1. Change in Visitor/Customer Volume and Revenue.

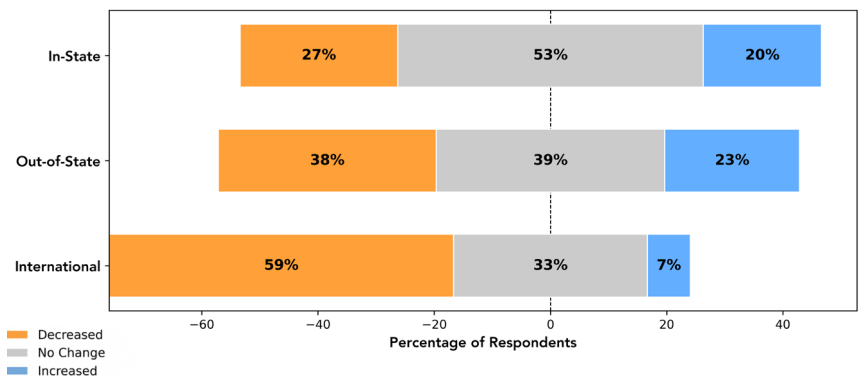


Fig. 2. Change in Visitor/Customer Origin.

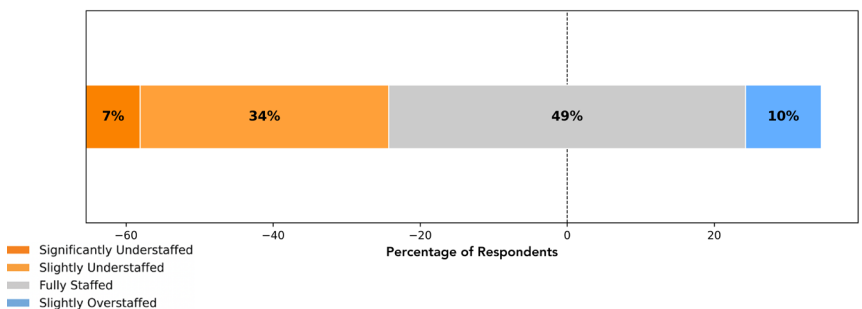


Fig. 3. Concerns Over Staffing.

This quarterly survey and report is a collaborative effort, produced by the Institute of Outdoor Recreation and Tourism at Utah State University on behalf of the Utah Office of Tourism.



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2025-Q4

Statewide Trends

Expectations for 2026 Quarter 1

Despite Q4 softness, respondents expressed cautious optimism for 2026-Q1 (Fig. 5). A larger share expects increases in visitor/customer volume (42.6%) than decreases (28%), and nearly half anticipate revenue growth (47% vs. 30% expecting declines). Staffing outlooks are more constrained: 21% expect staffing levels to decrease and only 15% expect increases.

Opportunities and Challenges for 2026 Quarter 1

Respondents identified the strongest opportunities in emerging markets/customers (28.4%) and expanded online marketing (28%), followed by local events/festivals (17.6%) and capital improvements (15%) (Fig. 6). The principal challenges cited were labor shortages (28%) and reduced demand (23%), with regulatory or policy changes (19%) and weather/environmental conditions (13%) also noted.

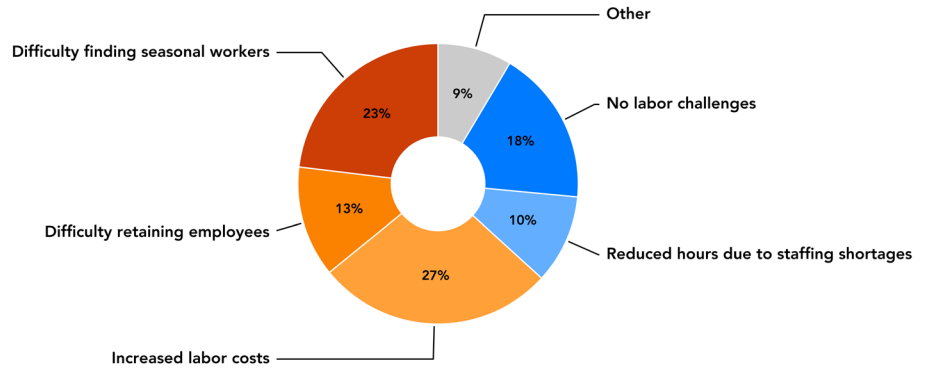


Fig. 4. Employment Experiences in 2025-Q4.

“ [We’re] in an odd chicken/egg situation for deciding whether to stay open during the slow season (this December is SLOW!!!), and encouraging more year-round visitation, or closing up shop,... ”

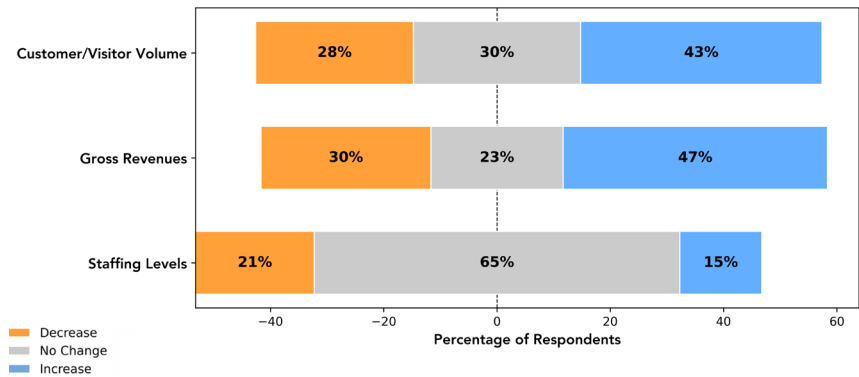


Fig. 5. Expectations For 2026-Q1.

“ We’re carefully monitoring the new national park fee increases to if and how that will impact visitation and visitor sentiment. ”

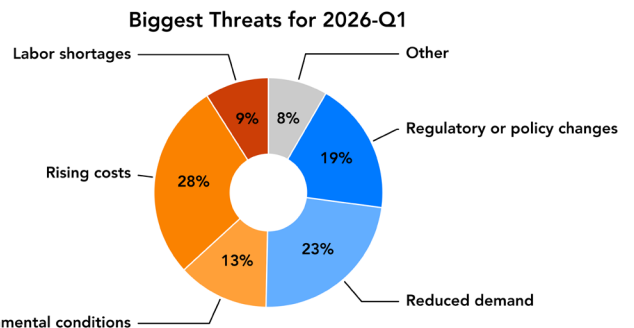
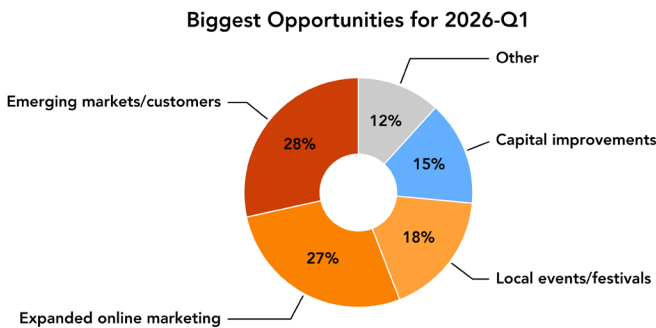


Fig. 6. Biggest Opportunities and Challenges for the Upcoming Quarter.

QUARTERLY PULSE

2025-Q4 of Utah's Tourism Industry

Regional Trends

The Quarterly Pulse of Utah's Tourism Industry captures timely, on-the-ground perspectives from tourism professionals statewide. Each quarter, industry participants complete a short online survey covering recent visitation and revenue trends, staffing and labor conditions, and expectations for the next quarter, complemented by open-ended "pulse check" responses on emerging issues.

Changes in Visitation and Gross Revenues

Regional results point to softer conditions overall, with Southern Utah reporting more widespread declines than Northern Utah (Fig. 7). Compared to 2025-Q3, Northern Utah was evenly split (38% reporting decreases and 38% reporting increases), while Southern Utah leaned negative (44% decreases versus 27% increases). Year-over-year patterns were similar: compared to 2024-Q4, Northern Utah again skewed toward declines (42% down; 38% up), and Southern Utah reported more decreases than increases (38% down; 31% up).

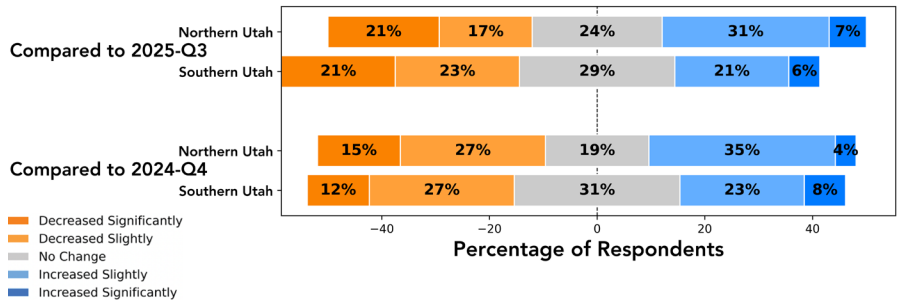


Fig. 7. Change in Visitor/Customer Volume and Revenue.

Changes by Visitor Origin

Shifts in nonresident travel appear to be a primary driver of regional performance (Fig. 8). In-state visitation was more stable but still tilted toward declines in both regions (Northern Utah: 31% down vs. 23% up; Southern Utah: 26% down vs. 18% up). The strongest weakness was in out-of-state and international markets. Northern Utah reported substantial out-of-state declines (46% down; 17% up) and pronounced international contraction (46% down; 5% up). Southern Utah also saw notable out-of-state softness (32% down; 26% up), with the sharpest international declines (63% down; 11% up).

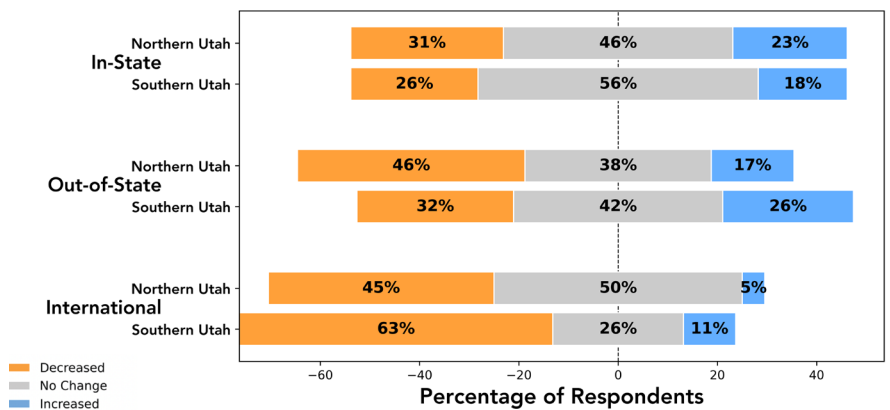


Fig. 8. Change in Visitor/Customer Origin.

Staffing and Workforce Conditions

Workforce capacity remained a binding constraint in both regions, with identical shares reporting they were understaffed (Northern Utah: 41%; Southern Utah: 41%) (Fig. 9). Respondents in both regions also frequently cited increased labor costs (over one-third) and difficulty finding seasonal workers (over one-quarter) (Fig. 10). These workforce conditions persisted even as some operators reported softer demand.

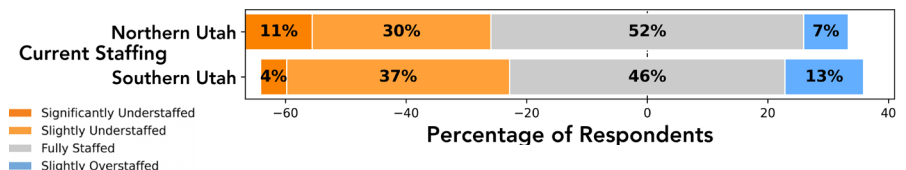


Fig. 9. Concerns Over Staffing.

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2025-Q4

Regional Trends

Expectations for 2026 Quarter 1

Outlooks for 2026-Q1 diverge meaningfully by region (Fig. 11). Northern Utah respondents were more optimistic, with 60% expecting increased visitor/customer volume and 73% expecting increased revenues. Southern Utah expectations were more cautious, with 33% anticipating decreased volume and 36% anticipating decreased revenues. Only small shares in both regions expect staffing levels to change.

Opportunities and Challenges for 2026 Quarter 1

Across both regions, respondents aligned on near-term opportunities in demand generation (Fig. 12): over one-quarter identified emerging markets/customers and expanded online marketing as leading opportunities. At the same time, over one-third in both regions identified rising costs, reduced demand, and regulatory or policy change as key threats.

Taken together, these findings reinforce tourism's role as a cornerstone of Utah's economy, supporting jobs, small businesses, and community vitality statewide.

“ We had a much better October than in previous years. The shoulder season here is expanding it would help to push skiers this way for day hikes! ”

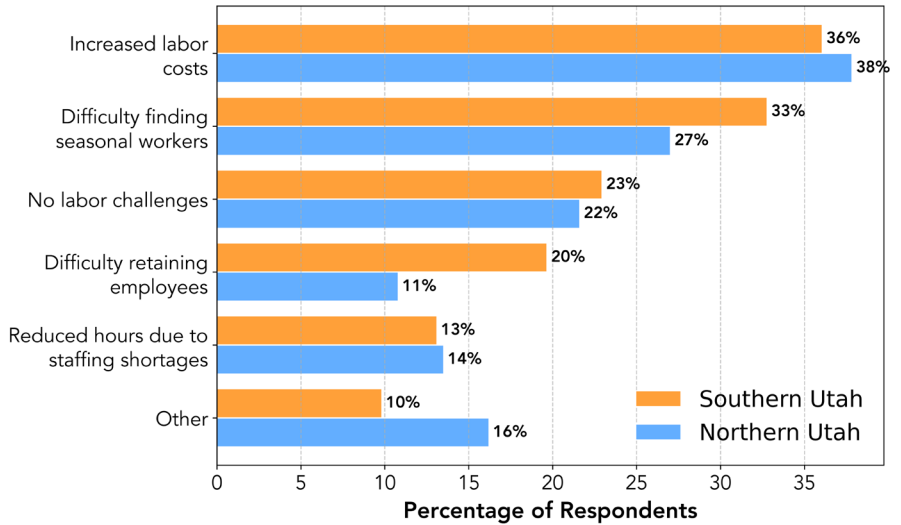


Fig. 10. Employment Experiences in 2025-Q4.

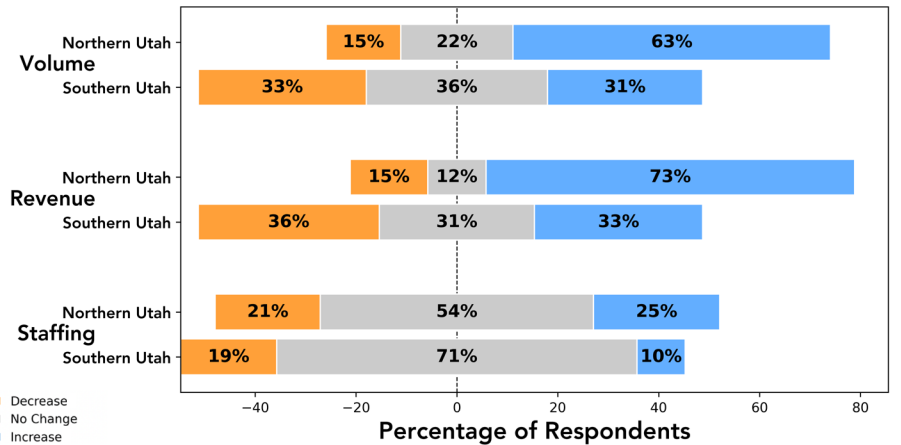
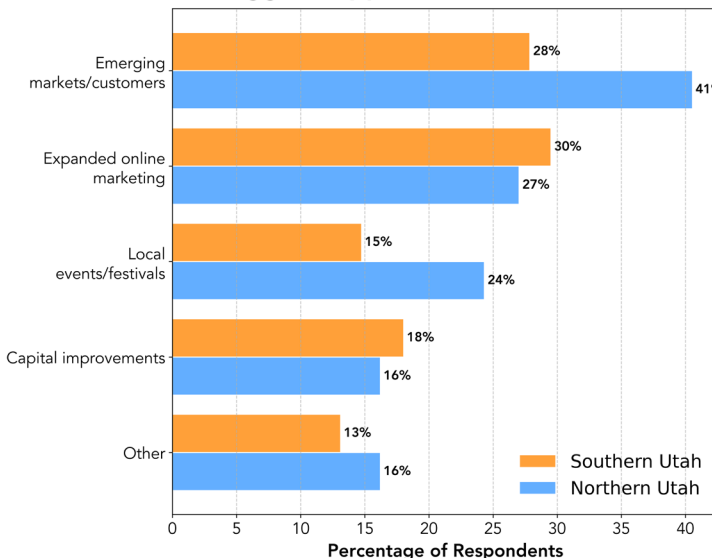


Fig. 11. Expectations For 2026-Q1.

Biggest Opportunities for 2026-Q1



Biggest Threats for 2026-Q1

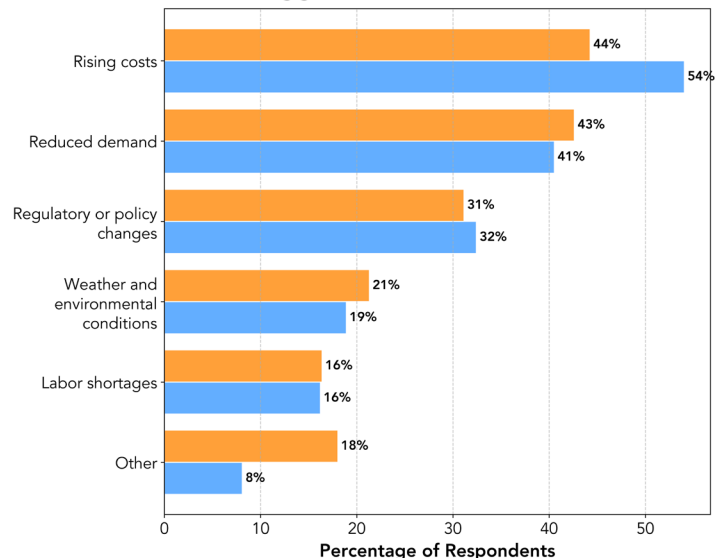


Fig. 12. Biggest Opportunities and Challenges for the Upcoming Quarter.

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Industry Trends

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Changes in Visitation and Gross Revenues

Across Arts & Culture, Food & Beverage, Lodging, and Retail, respondents reported broadly similar performance patterns (Fig. 13). Compared with 2025-Q3, each sector was split in roughly comparable proportions—about one-third indicating declines in visitor/customer volume and about two-fifths indicating increases—suggesting mixed but not sector-specific conditions. Year-over-year results were more encouraging: compared with 2024-Q4, a slight majority (approximately 55%) across sectors reported increases in revenues.

Changes by Visitor Origin

By visitor origin, sector differences were modest (Fig. 14). For both in-state and out-of-state visitors, Arts & Culture, Food & Beverage, Lodging, and Retail reported roughly equivalent shares experiencing increases and decreases, indicating that market gains and losses are being felt across the tourism value chain rather than concentrated in a single segment. International visitation, however, leaned negative across all sectors, with comparable shares reporting declines (roughly 35–55%).

“Spring 25 announcement of park ranger cutbacks reduced summer 25 bookings. Fall bookings improved due to pent up demand but did not make up for the precipitous drop-off in the heart of the spring booking season.”

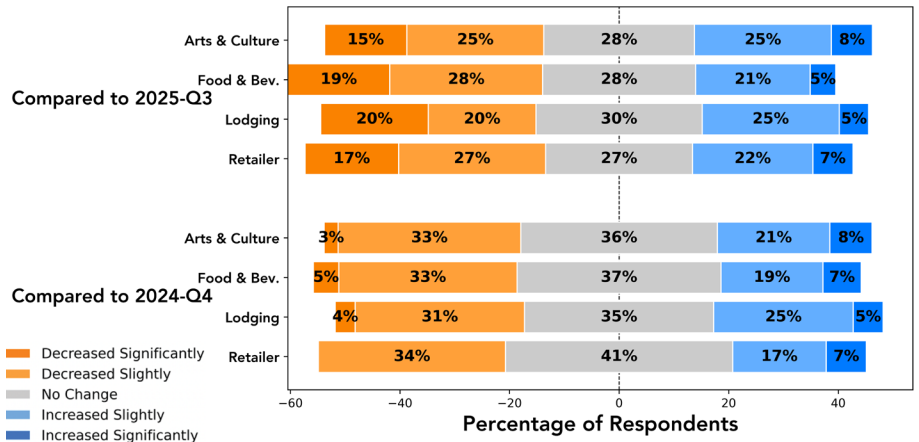


Fig. 13. Change in Visitor/Customer Volume and Revenue.

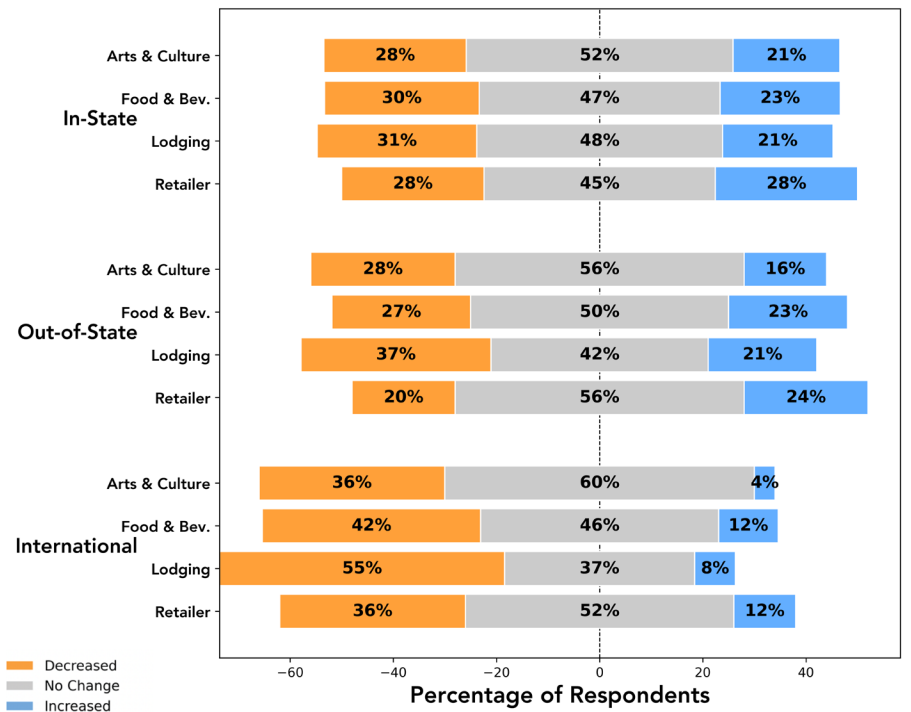


Fig. 14. Change in Visitor/Customer Origin.

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2025-Q4

Industry Trends

Staffing and Workforce Conditions

Workforce pressures remained consistent across sectors (Fig. 15). Roughly one-third of respondents in each sector reported increased labor costs, more than one-quarter reported difficulty finding seasonal workers, and about one-fifth reported challenges retaining employees. These workforce dynamics persisted across the tourism industry.

Opportunities and Challenges for 2026 Quarter 1

Respondents across all four sectors identified a similar set of near-term opportunities and risks for 2026-Q1 (Fig. 16). Around 30% identified expanding online marketing as a leading opportunity, with 20–30% pointing to emerging markets/customers and 20–25% highlighting local events and festivals. Rising costs stood out as the most common threat (over one-third across sectors), while roughly one-quarter cited regulatory or policy change and reduced demand.

Collectively, the cross-sector alignment underscores tourism's integrated role in Utah's economy: when conditions shift, they ripple across the ecosystem of experiences, services, and retail activity that supports jobs and community revenues statewide.

“Late fall into winter are typically slower times at the resort, aside from the direct holidays. Operating costs sometimes rise during this time, as we have to keep the units warm and functioning through the colder months.”

“We recently finished a renovation, and with the closing of another property, we have seen an increase in our business.”

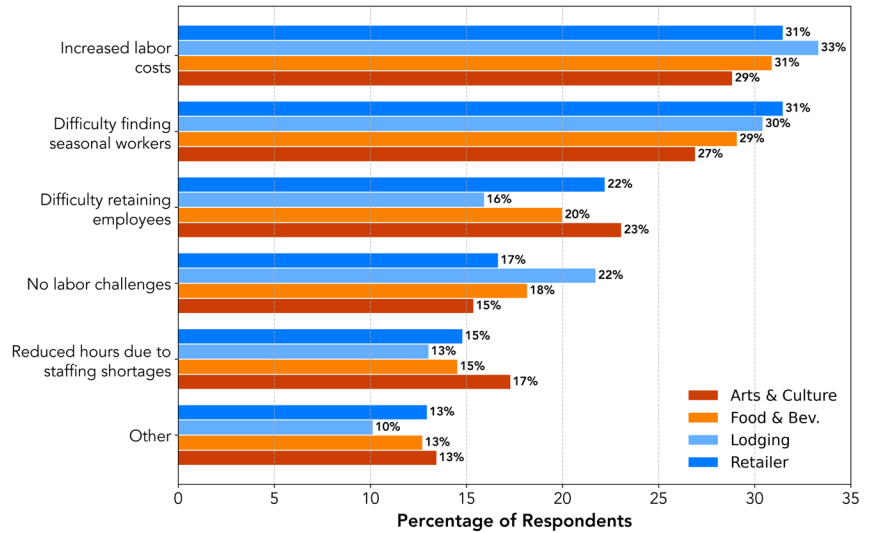
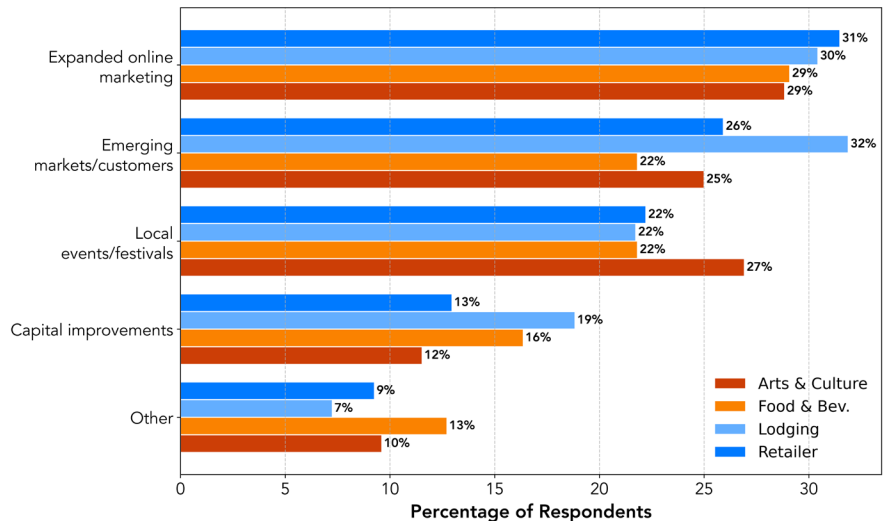


Fig. 15. Employment Experiences in 2025-Q4.

Biggest Opportunities for 2026-Q1



Biggest Threats for 2026-Q1

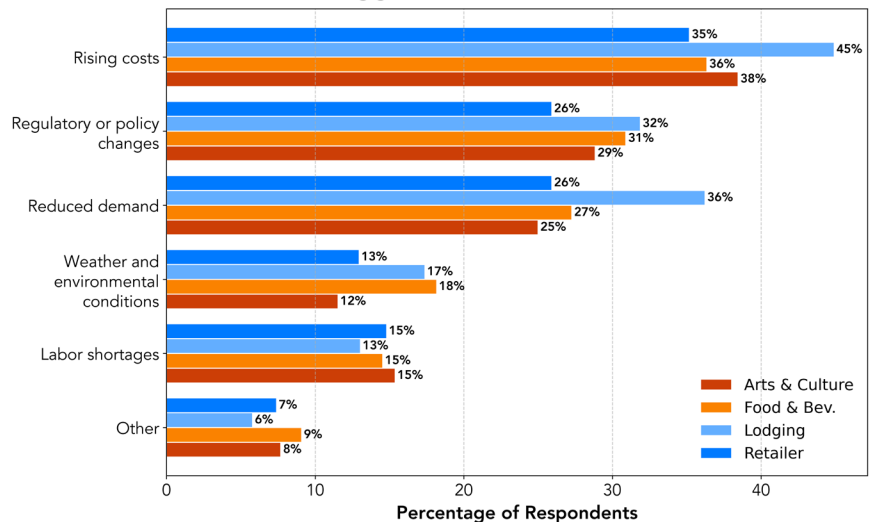


Fig. 16. Biggest Opportunities and Challenges for the Upcoming Quarter.