

# QUARTERLY PULSE

## 2026-Q1 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.

#### 2026 Quarter 1 Response

The survey received 113 responses representing 26 of Utah's 29 counties, along with a set of statewide respondents. Participation was strongest in Salt Lake County (17) and Garfield County (15), with additional concentrations among statewide respondents (12), Davis County (11), and Grand County (10). Responses spanned key tourism segments, led by "other" organizations (24), destination marketing organizations (DMOs) (21), and the lodging industry (18). Additional input came from retailers (10), arts & culture (9), outfitter & guide businesses (9), food & beverage (8), and chambers of commerce (6).

#### Changes in Visitation and Gross Revenues

Across Utah, respondents reported more positive conditions in 2026-Q1 compared to the previous quarter (Fig. 1). For visitor/customer volume, 50% of respondents reported an increase, 35% reported a decrease, and 15% reported no change. For gross revenues, responses were more tilted negative: 47% reported a decrease, 40% reported an increase, and 13% reporting no change.

When compared to the same quarter in 2025, respondents tended to report that both visitor/customer volume and revenues have improved (Fig. 1). For visitor/customer volume, 51% of respondents reported an increase, 32% reported a decrease, and 17% reported no change. Similar percentages were reported for revenues (46% reporting an increase, 37% reporting a decrease, and 17% reporting no change).

#### Changes by Visitor Origin

Respondents reported stable to increasing customer/visitor volume from in-state and out-of-state markets in 2026-Q1 compared to the previous quarter (Fig. 2). For in-state visitors, 38% reported an increase, 21% reported a decrease, and 41% reported no change. For out-of-state visitors, results were similar, with 41% reporting an increase, 18% reporting a decrease, and 41% reporting no change. In contrast, international

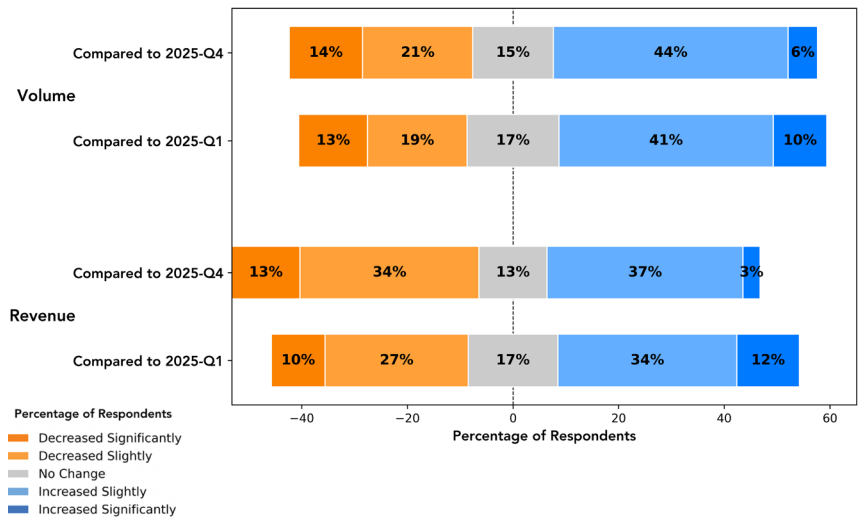


Fig. 1. Change in Visitor/Customer Volume and Revenue.

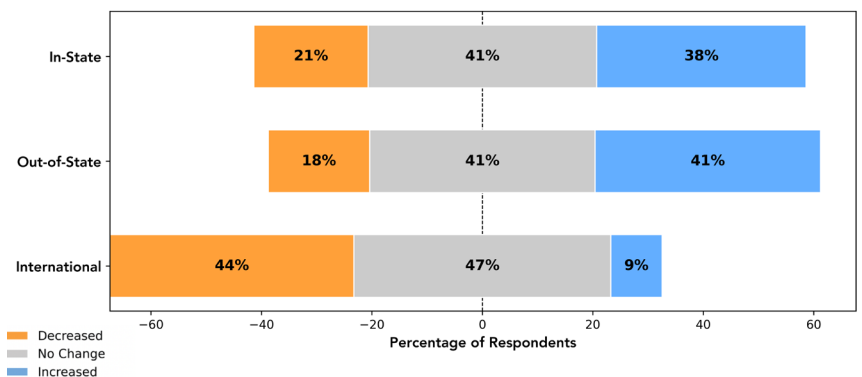


Fig. 2. Change in Visitor/Customer Origin Compared to the Previous Quarter (2025-Q4).

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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## 2026-Q1

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visitation remained weaker: 44% of respondents reported a decrease, 47% reported no change, and only 9% reported an increase.

#### Staffing and Workforce Conditions

Workforce constraints remained significant in 2026-Q1 (Fig. 3). Reported employment experiences were led by increased labor costs (35%) and difficulty finding seasonal workers (21%), followed by difficulty retaining employees (17%). Operational impacts were also reported, with 9% indicating reduced hours due to staffing shortages. A smaller share of respondents reported no labor challenges (12%), and 6% described other experiences.

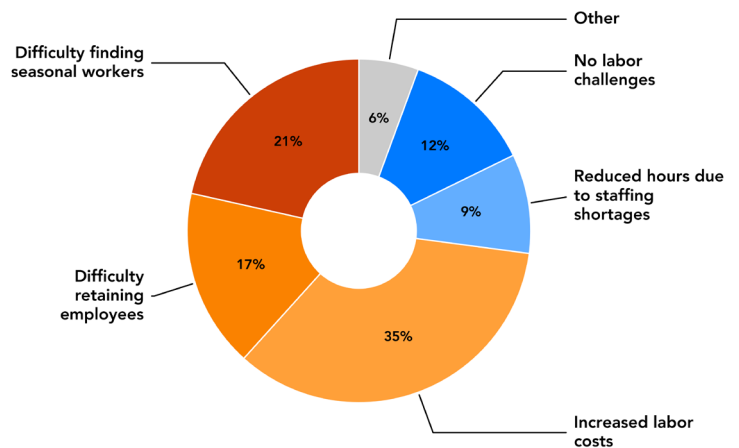


Fig. 3. Employment Experiences This Quarter (2026-Q1).

#### Expectations for 2026 Quarter 2

Respondents expressed strong optimism for the upcoming quarter (Fig. 4). Nearly three-quarters expect increases in customer/visitor volume (74%), with 21% anticipating no change and 5% expecting decreases. Expectations for gross revenues were similarly positive, with 77% projecting increases, 16% anticipating no change, and 7% expecting declines. Staffing expectations were more stable: 66% expect staffing levels to remain unchanged, 25% expect increases, and 8% expect decreases.

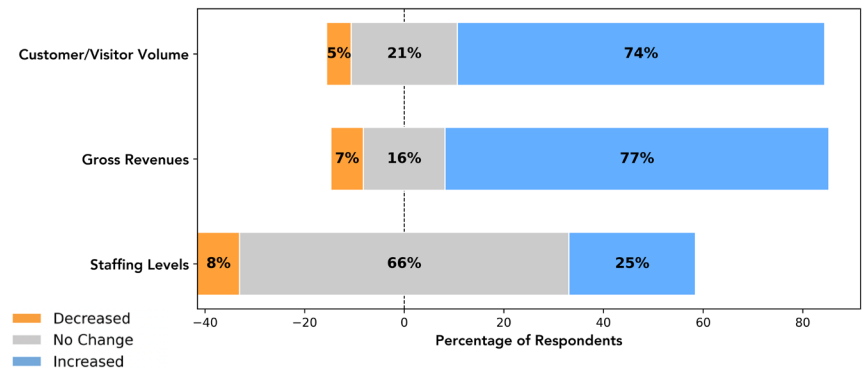


Fig. 4. Expectations For the Upcoming Quarter (2026-Q2).

#### Opportunities and Challenges for 2026 Quarter 2

The strongest opportunities for the upcoming quarter were seen in local events and festivals (31%) and emerging markets/customers (27%), followed by expanded online marketing (21%) and capital improvements (16%) (Fig. 5). The principal challenges cited were rising costs (36%), weather and environmental conditions (17%), and labor shortages (15%), with reduced demand (14%) and regulatory or policy changes (12%) also noted.

Overall, respondents reported improved volume and slightly improved revenues in 2026-Q1 relative to 2025-Q4, continued softness in international visitation, persistent workforce cost and hiring pressures, and strong optimism for 2026-Q2 despite rising costs remaining the most-cited challenge.

“Operating costs and staffing shortages have played a significant role in making it harder for businesses to keep workers employed and enough staff to keep revenue flowing.”

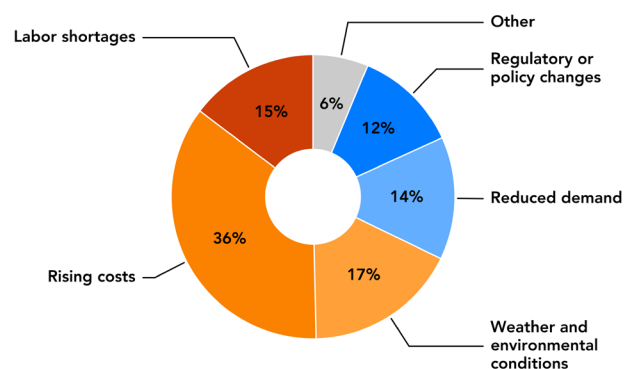
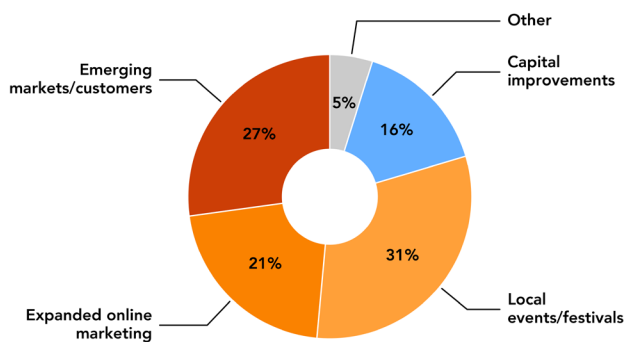


Fig. 5. Biggest Opportunities and Challenges for the Upcoming Quarter (2026-Q2).

# QUARTERLY PULSE

## 2026-Q1 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

A regional comparison of visitation and gross revenues shows stronger results for visitor/customer volume than for gross revenues (Fig. 6). Compared to the previous quarter, both Northern and Southern Utah reported 50% increases in volume, while declines were slightly more common in Southern Utah (39%) than Northern Utah (31%). In contrast, gross revenues compared to the previous quarter tilted negative in both regions (Northern: 45% down vs. 39% up; Southern: 50% down vs. 42% up).

Compared to the same quarter in 2025, volume was up in both Northern Utah (57% up, 24% down) and Southern Utah (46% up, 37% down). Revenues, by contrast, were closer to balanced in both regions of the state (Northern Utah: 45% up, 42% down; Southern Utah: 46% up, 35% down).

#### Changes by Visitor Origin

Changes in visitor origin relative to the previous quarter differed by region (Fig. 7). Northern Utah was characterized by high shares of respondents reporting no change for in-state (45%) and out-of-state (48%) markets, alongside modest net gains. Southern Utah reported clearer gains for both in-state (47% reporting an increase) and out-of-state (50% reporting an increase) visitors. International visitation remained the clearest weakness, particularly in Southern Utah (55% reporting decreases); Northern Utah reported mostly no change (76%).

#### Staffing and Workforce Conditions

Workforce constraints remained prominent in both regions. A majority of respondents characterized current staffing as understaffed (58% Northern; 69% Southern). Reported employment experiences were led by increased labor costs (37% in both regions) (Fig. 8). Southern Utah more frequently reported difficulty finding seasonal workers (31% vs. 15%), difficulty retaining employees (25% vs. 13%), and reduced hours due to staffing shortages (14% vs. 4%) than Northern Utah.

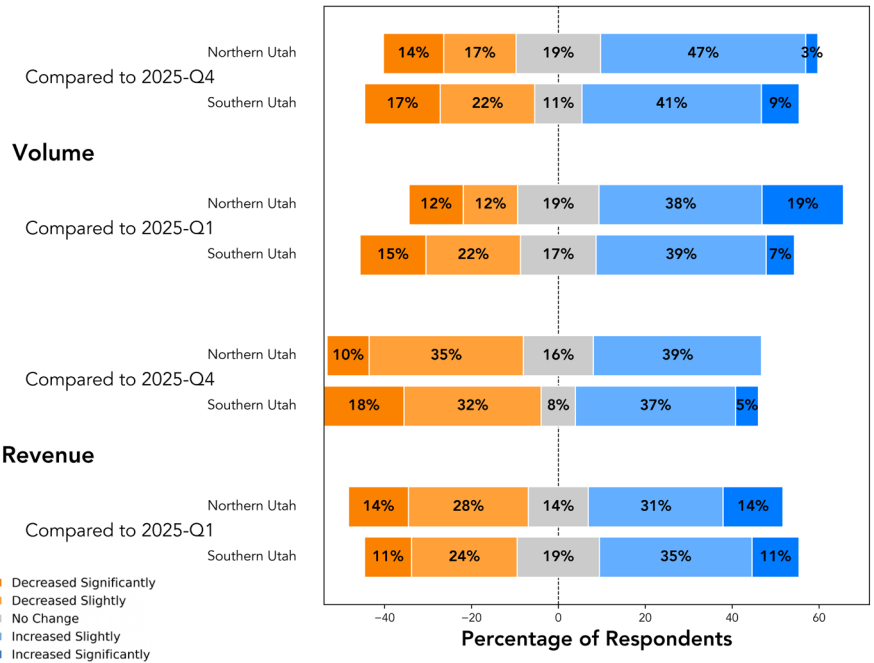


Fig. 6. Change in Visitor/Customer Volume and Revenue.

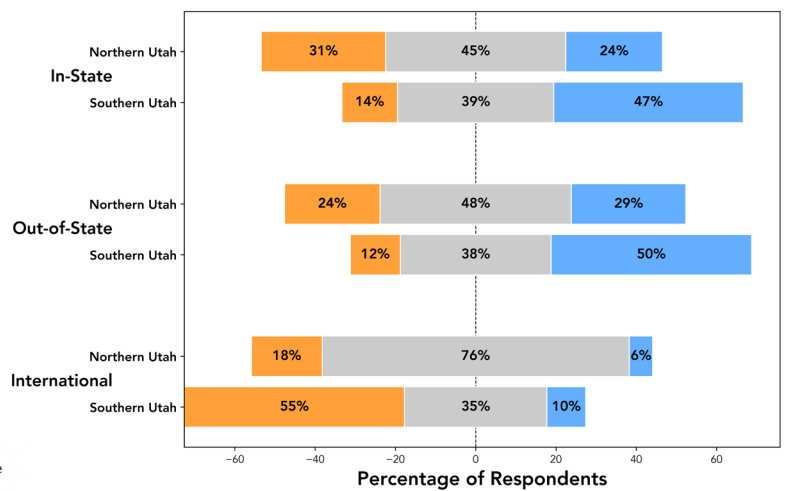


Fig. 7. Change in Visitor/Customer Origin Compared to the Previous Quarter (2025-Q4).

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## 2026-Q1

### Regional Trends

#### Expectations for 2026 Quarter 2

Expectations for the upcoming quarter (2026-Q2) were strongly positive across both regions (Fig. 9). For customer/visitor volume, 66% of Northern Utah and 79% of Southern Utah respondents expect increases, with relatively few expecting decreases (7% and 5%, respectively). Revenue expectations were similarly positive (74% Northern; 79% Southern). Staffing expectations were more stable, with most anticipating no change (57% Northern; 73% Southern).

#### Opportunities and Challenges for 2026 Quarter 2

Respondents identified local events/festivals as the leading opportunity for growth in the upcoming quarter (Northern Utah: 43%; Southern Utah: 27%) (Fig. 10). Emerging markets/customers was seen as a bigger opportunity for Southern Utah (34%), than Northern Utah (22%). The leading challenge in both regions was rising costs (52% Northern; 54% Southern) (Fig. 10), followed by weather/environmental conditions and labor shortages.

Taken together, these results underscore tourism's continued importance to Utah's economy while highlighting differences in near-term conditions and constraints across Northern and Southern Utah.

“Using tourism taxes for establishing and promoting tourism [has generated] an immediate uptick in visitors bringing our falling hotel occupancy back up, or at least stopped the decline.”

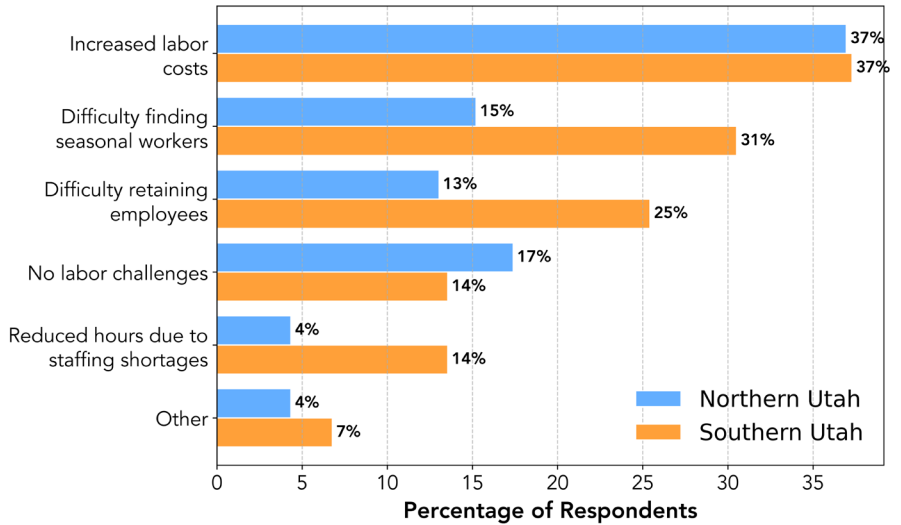


Fig. 8. Employment Experiences This Quarter (2026-Q1).

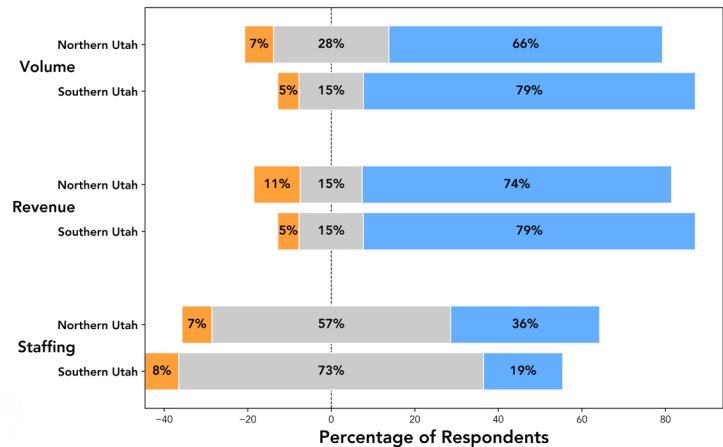
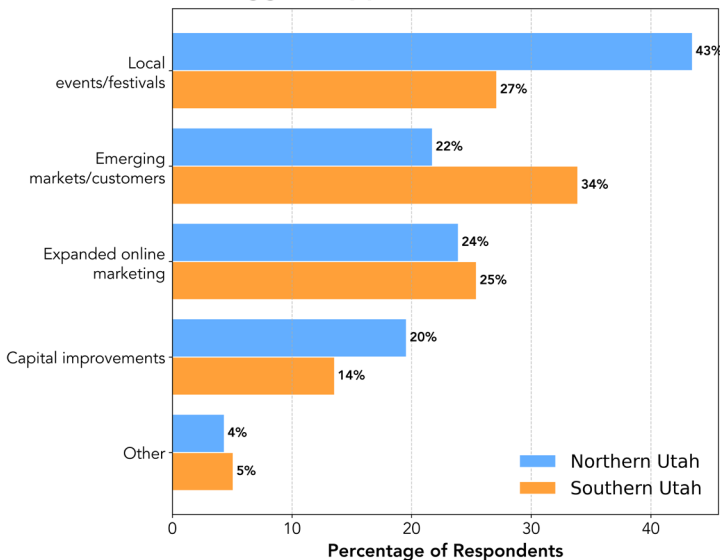


Fig. 9. Expectations For the Upcoming Quarter (2026-Q2).

#### Biggest Opportunities for 2026-Q2



#### Biggest Threats for 2026-Q2

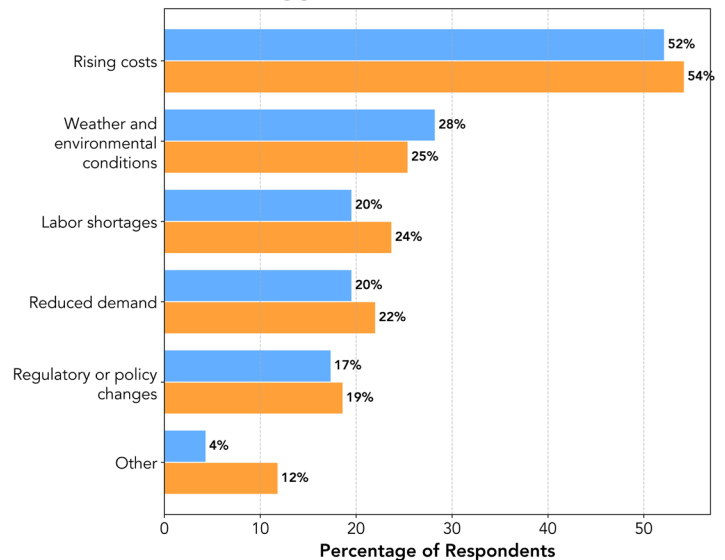


Fig. 10. Biggest Opportunities and Challenges for the Upcoming Quarter (2026-Q2).

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#### Changes in Visitation and Gross Revenues

Across Arts & Culture, Food & Beverage, Lodging, and Retail, visitor/customer volume increased more often than it decreased in 2026-Q1 (Fig. 11). Compared to the previous quarter (2025-Q4), roughly half or more of respondents in each sector reported higher volume (Arts & Culture 49%, Food & Bev. 60%, Lodging 49%, Retail 49%), with decreases ranging from 27–36%. Year-over-year (compared to 2025-Q1), the pattern was similarly positive, with major volume increases more commonly reported than in the quarter-over-quarter comparison.

By contrast, gross revenue performance was more mixed (Fig. 11). Compared to the previous quarter, Food & Bev. leaned positive (47% up vs. 43% down) and Lodging was near-balanced (44% up vs. 40% down), while Arts & Culture (42% up vs. 46% down) and Retail (38% up vs. 53% down) tilted negative. Revenues in 2026-Q1 were closer to equivalent to those generated in the same quarter of 2025.

“Visitation to [the] canyons [in Northern Utah] remains strong, driven by ongoing investment in Utah's ski industry and national visibility. This has increased demand for lodging, dining, and short term rentals, reinforcing the region's importance as a basecamp for outdoor recreation.”

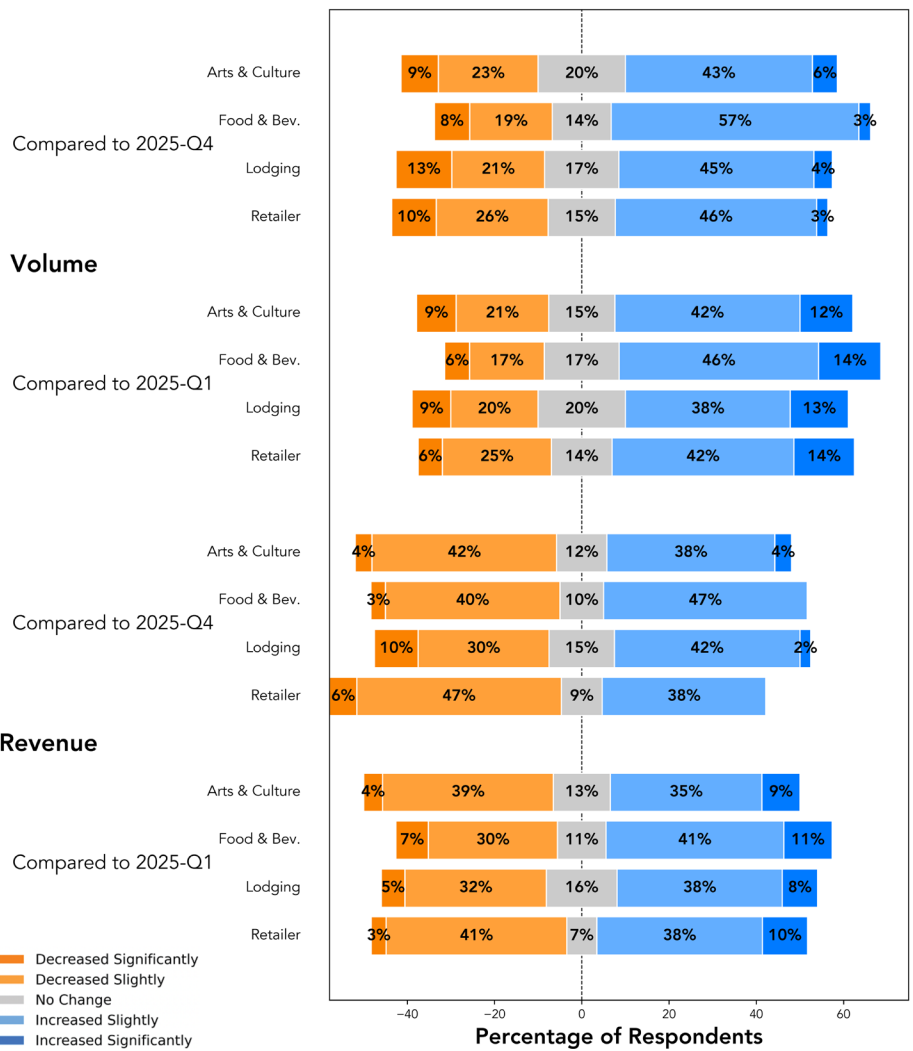


Fig. 11. Change in Visitor/Customer Volume and Revenue.

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## 2026-Q1

### Industry Trends

#### Opportunities and Challenges for 2026 Quarter 2

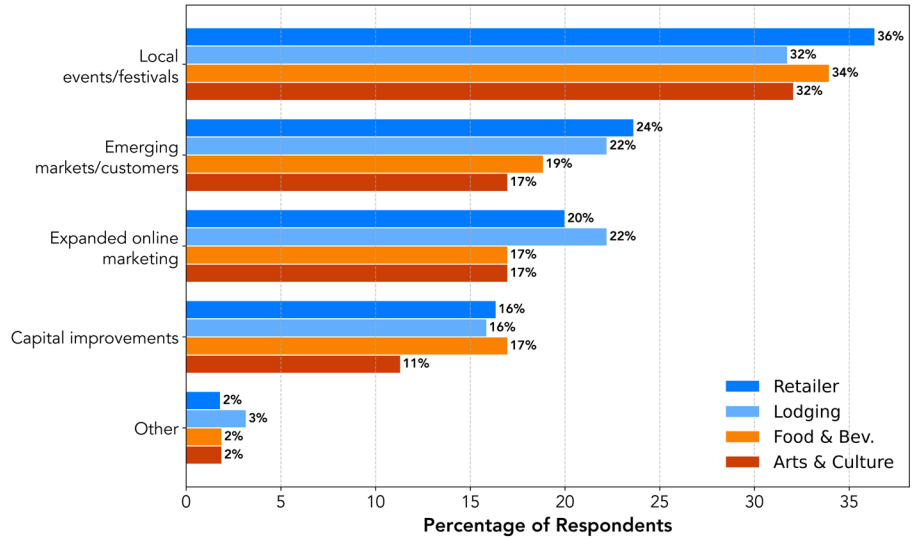
Respondents across sectors identified a consistent set of near-term opportunities and risks for the upcoming quarter (Fig. 12). Local events/festivals emerged as the most frequently cited opportunity (~32–36% across sectors), followed by emerging markets/customers (~17–24%) and expanded online marketing (~17–22%). Capital improvements were cited less frequently overall (~11–17%).

On the challenge side, rising costs dominated across all sectors (~38–49%), standing well above other concerns. A second tier of threats included weather/environmental conditions and labor shortages (generally in the low-to-mid 20% range), with regulatory/policy changes and reduced demand also cited by meaningful shares (roughly low-teens to low-20s, depending on sector).

Collectively, these industry patterns reinforce that tourism's impacts are felt across the full value chain in Utah—when volume shifts, it quickly translates into operational and revenue implications for attractions, dining, lodging, and retail.

“The number of tourists visiting the area increases each year - many wanting to relocate to the area. More housing means more water needed, which is always a concern.”

#### Biggest Opportunities for 2026-Q2



#### Biggest Threats for 2026-Q2

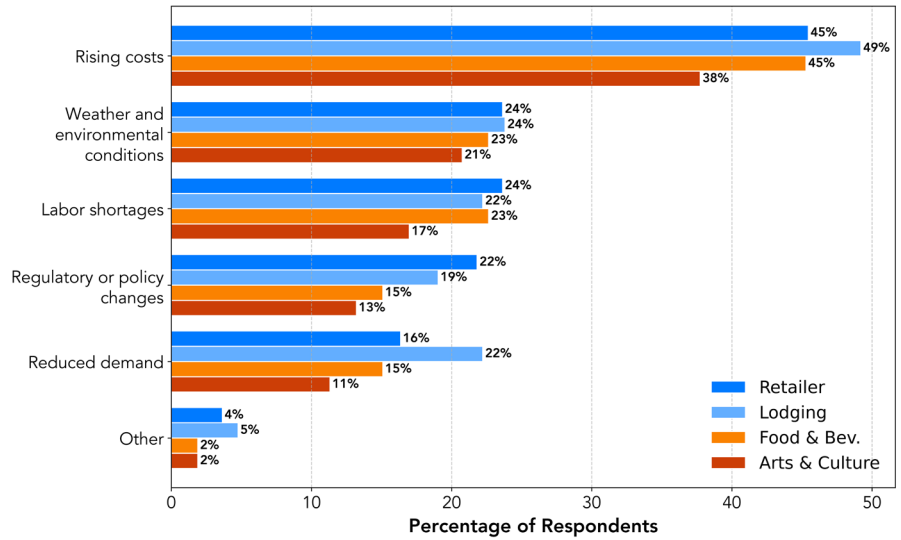


Fig. 12. Biggest Opportunities and Challenges for the Upcoming Quarter (2026-Q2).

“We had our first ever winter plunge, Freeze the Gorge. It was a small event but it went very successfully. All of our businesses struggle to remain open during the winter. (Many don't) We are focusing a lot of energy into our off season. This turned out to be a great start.”