

QUARTERLY PULSE

2026-Q2 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 2 Response

The 2026 second-quarter survey received 82 responses from 20 Utah counties. Respondents represented lodging (34%), guides and outfitters (26%), destination marketing organizations (16%), food and beverage businesses (14%), and retailers (10%). The sample also covered a broad range of business sizes: 25% had 1–5 employees, 23% had 6–20, 20% had 21–50, 10% had 51–100, and 23% had more than 100.

Changes in Visitation and Gross Revenue

Statewide performance was mixed compared with the first quarter but clearly softer than a year earlier. For customer/visitor volume, 37% reported a quarter-over-quarter decrease, while 42% reported an increase and 21% reported no change. The year-over-year comparison was less favorable: 54% reported lower volume than in 2025-Q2, compared with 30% reporting an increase and 16% reporting no change. Revenue followed a similar pattern. Compared with 2026-Q1, 45% reported a decrease, 42% an increase, and 12% no change. Compared with 2025-Q2, 53% reported lower revenue, 41% higher revenue, and 6% no change (Figure 1). Together, the results suggest a polarized quarter alongside broad year-over-year pressure.

Changes by Visitor Origin

In-state travel was the most resilient market: 39% reported an increase, 16% a decrease, and 45% no change from 2026-Q1. Out-of-state visitation was nearly balanced, with 35% reporting growth, 32% reporting a decline, and 32% reporting no change. International visitation was the clearest weakness; 67% reported a decrease, while only 17% reported an increase and 17% saw no change (Figure 2).

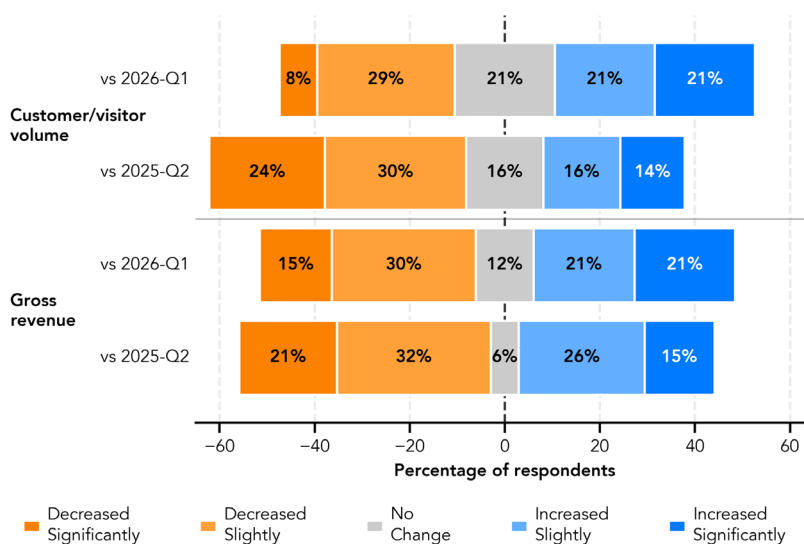


Fig. 1. Change in Visitor/Customer Volume and Revenue.

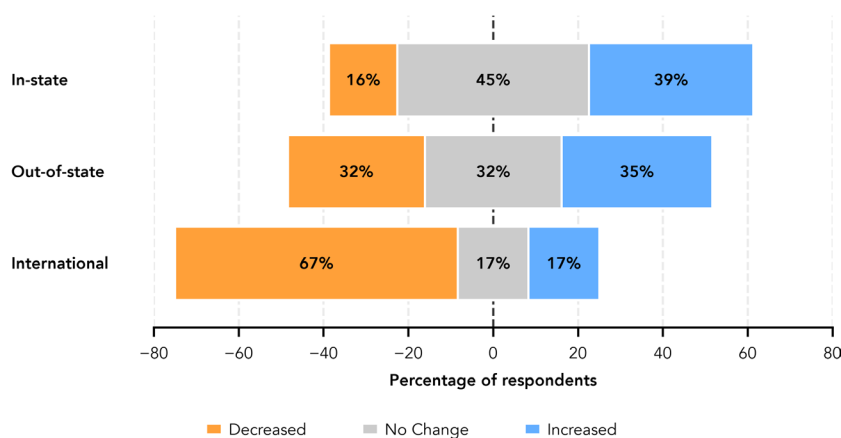


Fig. 2. Change in Visitor/Customer Origin Compared to the Previous Quarter (2026-Q1).

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.

QUARTERLY PULSE of Utah's Tourism Industry

2026-Q2

Statewide Trends

Staffing and Workforce Conditions

Workforce pressures remained widespread. Only 24% selected none of the listed employment experiences, meaning 76% identified at least one issue or condition. Increased labor costs were most common at 30%, followed by difficulty retaining employees at 22%. Other responses accounted for 10%, difficulty finding seasonal workers for 8%, and reduced hours caused by staffing shortages for 6% (Figure 3). Labor cost and retention concerns therefore accounted for more than half of responses combined.

Expectations, Opportunities, and Threats for 2026-Q3

Expectations for 2026-Q3 were mixed. The visitor-volume outlook leaned slightly positive: 45% expected an increase, 42% a decrease, and 12% no change. Revenue expectations leaned slightly negative, with 48% anticipating a decrease, 42% an increase, and 9% no change. Staffing appeared considerably more stable: 69% expected no change, while 23% expected a decrease and 9% an increase (Figure 4). Respondents also identified practical paths to growth. Expanded online marketing led at 34%, followed by emerging markets or customers at 26%, local events and festivals at 20%, and capital improvements at 16%; 4% named other opportunities. On the threat side, rising costs ranked first at 28%, followed by reduced demand at 21%, regulatory or policy changes at 19%, weather or environmental conditions at 15%, labor shortages at 11%, and other concerns at 7% (Figure 5). The pattern combines an outward focus on demand generation with a defensive focus on costs and market softness.

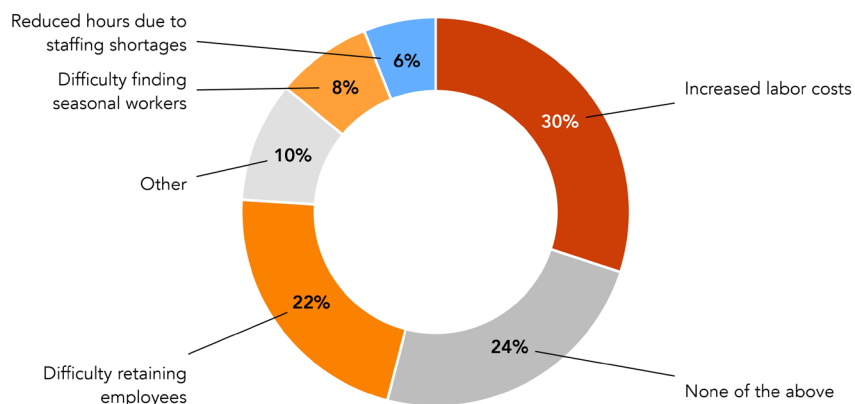


Fig. 3. Employment Experiences This Quarter (2026-Q2).

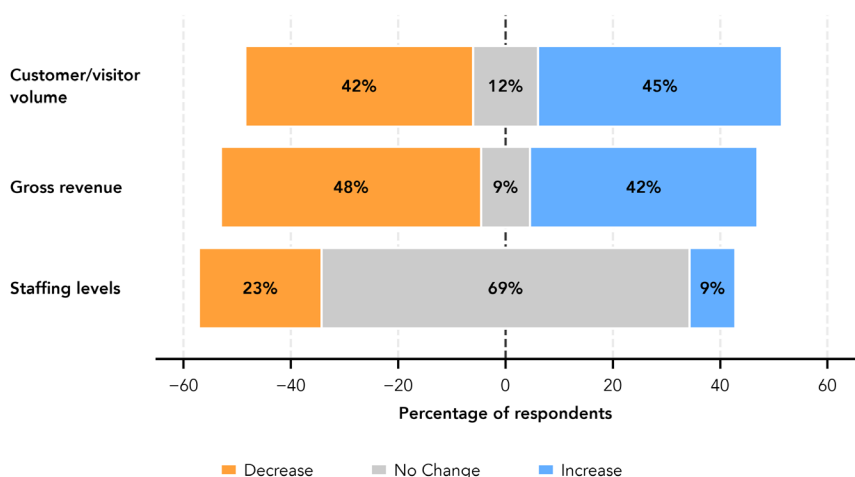
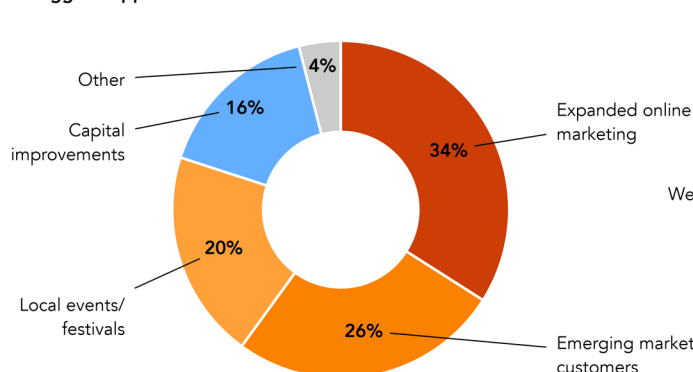


Fig. 4. Expectations For the Upcoming Quarter (2026-Q3).

Biggest Opportunities for 2026-Q3



Biggest Challenges for 2026-Q3

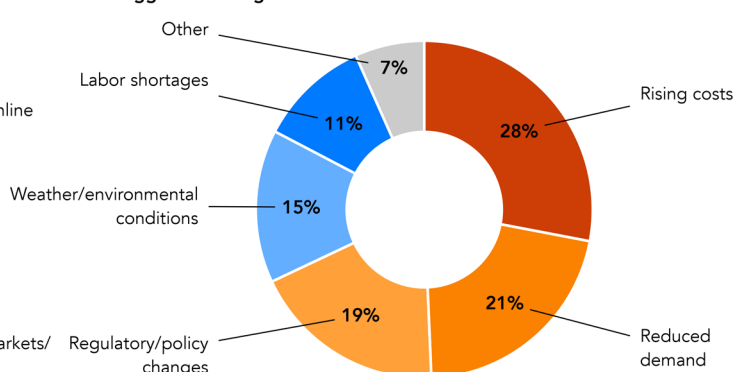


Fig. 5. Biggest Opportunities and Challenges for the Upcoming Quarter (2026-Q3).

QUARTERLY PULSE

2026-Q2 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 Revenue

Quarter-over-quarter results diverged by region. In Northern Utah, 50% reported lower visitor volume and 36% reported growth; in Southern Utah, only 32% reported a decline while 43% reported an increase. The year-over-year view reversed that advantage: 46% of Northern Utah respondents reported lower volume, compared with 59% in Southern Utah. Revenue was also weaker in the north from 2026-Q1, with 54% reporting a decrease and 36% an increase. Southern Utah revenue was evenly split, with 43% reporting a decrease and 43% an increase. Relative to 2025-Q2, 54% in both regions reported lower revenue, while increases were reported by 45% in the north and 38% in the south (Figure 6).

Visitor Origin and Workforce Conditions

Southern Utah's quarter-over-quarter strength came largely from nearby markets. In-state visitation increased for 45% of Southern Utah respondents and decreased for 14%; Northern Utah respondents were evenly divided at 27% increased and 27% decreased. Out-of-state visitation rose for 45% in Northern Utah, while Southern Utah respondents were split at 36% increased and 36% decreased. International visitation declined for 44% in the north and 74% in the south (Figure 7). Workforce findings were directionally similar but more acute in Northern Utah: 46% cited higher labor costs and 46% difficulty retaining employees, versus 37% and 30%, respectively, in Southern Utah. One-third of Southern Utah respondents selected none of the listed conditions, compared with 23% in the north (Figure 8).

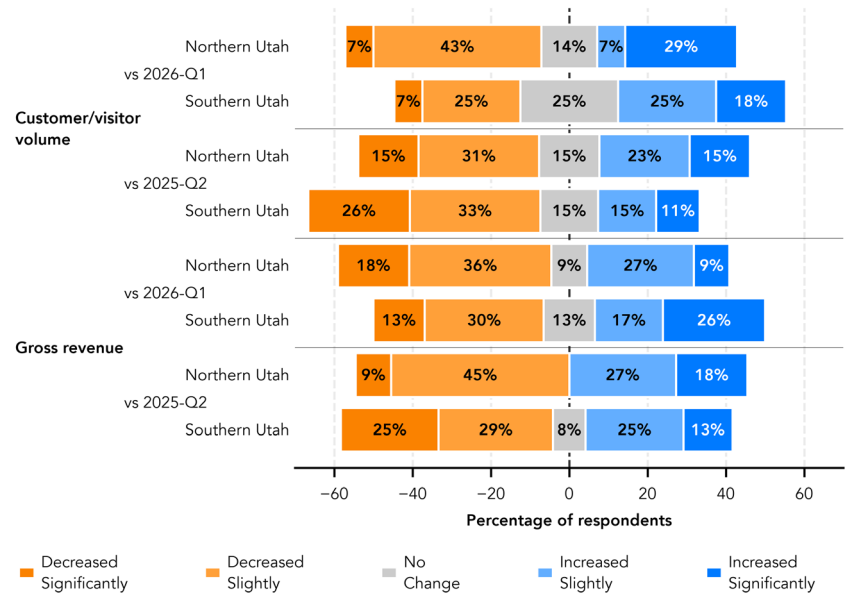


Fig. 6. Change in Visitor/Customer Volume and Revenue.

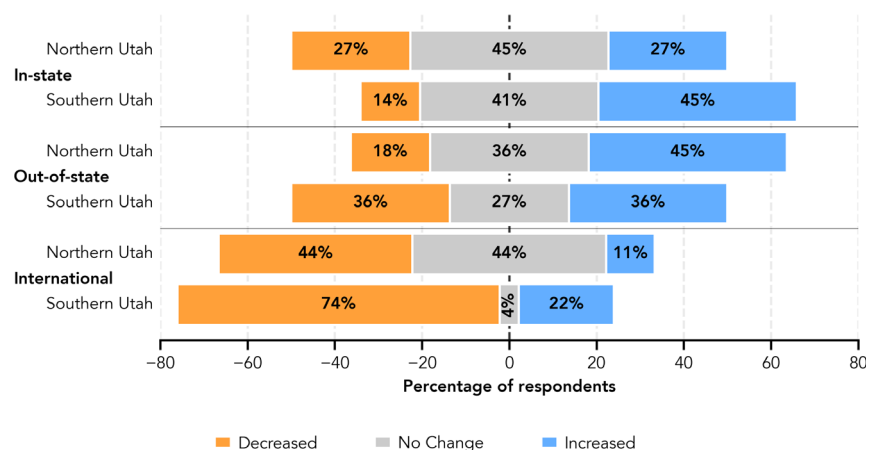


Fig. 7. Change in Visitor/Customer Origin Compared to the Previous Quarter (2026-Q1).

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QUARTERLY PULSE of Utah's Tourism Industry

2026-Q2

Regional Trends

Expectations, Opportunities, and Threats for 2026-Q3

Northern Utah respondents were more optimistic about 2026-Q3: 55% expected increases in both visitor volume and revenue, while 27% expected decreases in each. In Southern Utah, 42% expected visitor growth versus 46% expecting a decline; for revenue, 38% expected growth and 54% a decline. Staffing was expected to hold steady by 58% in the north and 73% in the south (Figure 9). Southern Utah respondents placed more emphasis on online marketing (57% versus 36%) and new markets (43% versus 36%), while Northern Utah respondents emphasized events and festivals (45% versus 26%). Rising costs dominated threats to respondents in Northern Utah at 91%, compared with 52% in the southern portion of the state. Southern Utah respondents were more likely to cite reduced demand (52% versus 27%), policy or regulatory change (44% versus 27%), and weather or environmental conditions (36% versus 18%) (Figure 10).

“I have the few international guests who are traveling to our area tell me on a regular basis that it is “VERY UNPOPULAR” to travel in the United States right now. I hope that the state of Utah realizes what an economic driver tourism is to this state, especially in this underdeveloped area and will take steps to help us rebuild our country’s reputation as being one that welcoming and desirable to international travel.”

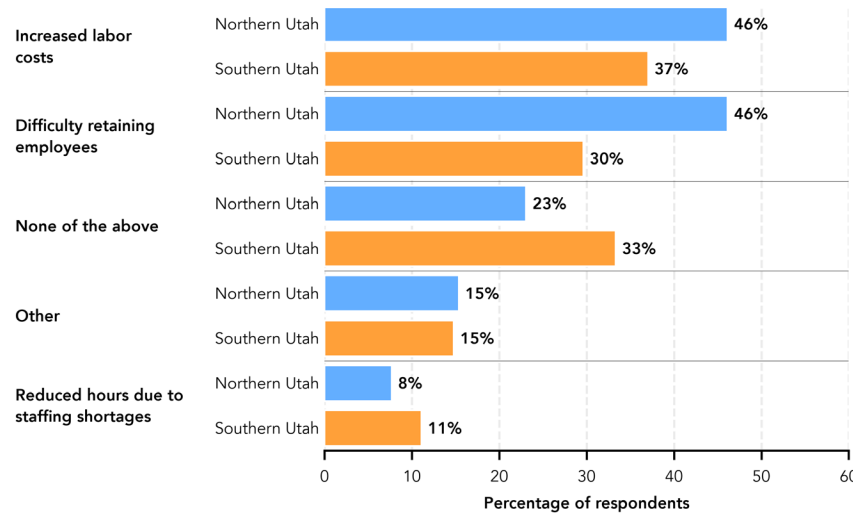


Fig. 8. Employment Experiences This Quarter (2026-Q2).

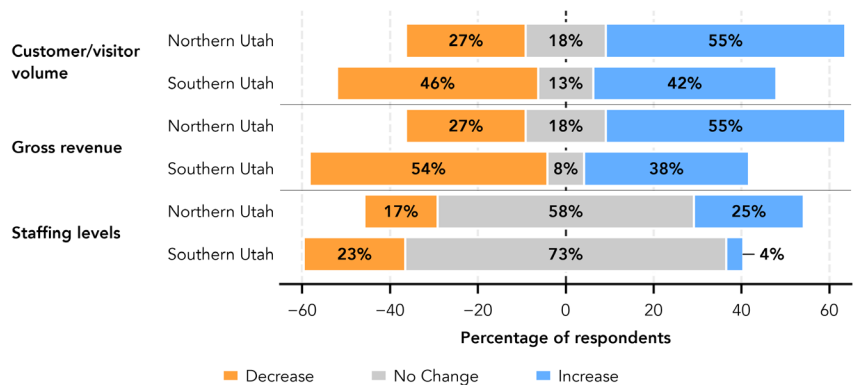


Fig. 9. Expectations For the Upcoming Quarter (2026-Q3).

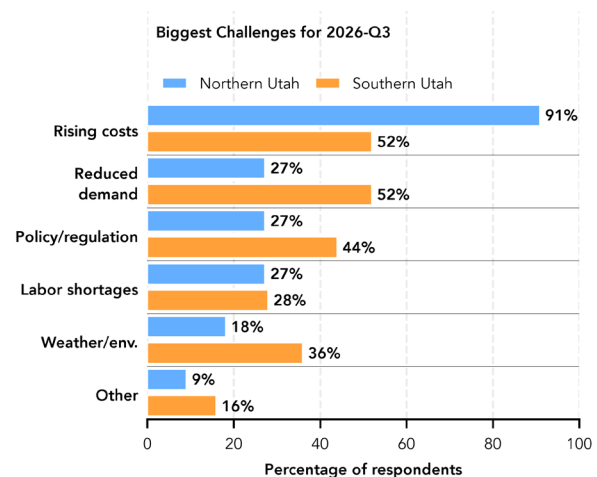
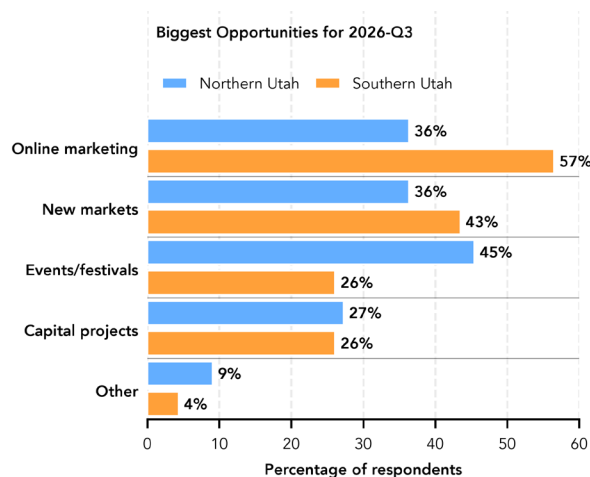


Fig. 10. Biggest Opportunities and Challenges for the Upcoming Quarter (2026-Q3).

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Industry Trends

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Industry Leader Insight

Travel has been an interesting business this year. Day tour activities are down in performance between 5 to 10% YOY. Multi-day guided tour bookings, custom tour bookings, and group bookings are up YOY—significantly up! Most of this business is domestic travelers, not international. The domestic US traveler, especially the demographic aged 45 to 75, has remained strong. This strength is evident for this year, 2026, as well as for 2027 and 2028. Inbound international travel has

been down for the year. Decreases of 30% to 50% depending on the market. The mountain west remains strong but it has still slipped overall. Post World Cup we have actually seen positive booking patterns for both last minute bookings and future bookings into 2027 and 2028.

The strongest section of the market isn't the budget traveler but the mid- to high-end luxury traveler.

- Jason Murray Southwest Adventure Tours

Changes in Visitation and Gross Revenue

Lodging was the clearest quarter-over-quarter bright spot. Forty-eight percent of lodging respondents reported increased visitor volume, compared with 31% reporting a decline, while 60% reported increased revenue and 35% reported a decline. Other sectors were softer: visitor volume decreased for 57% of arts and culture respondents, 50% of food and beverage respondents, and 59% of retailers; revenue decreased for 60%, 54%, and 70%, respectively. Year over year, visitor volume declined for 71% of arts and culture respondents, 57% of food and beverage respondents, and 59% of retailers; revenue decreased for 60%, 54%, and 70%, respectively. Year over year, visitor volume declined for 71% of arts and culture respondents, 57% of food and beverage respondents, and 59% of retailers; revenue decreased for 60%, 54%, and 70%, respectively. Revenue comparisons were more balanced: increases and decreases were each reported by 40% in arts and culture and about 45% in food and beverage; lodging posted 50% higher versus 45% lower revenue, while retail remained weakest at 60% lower versus 30% higher (Figure 11).

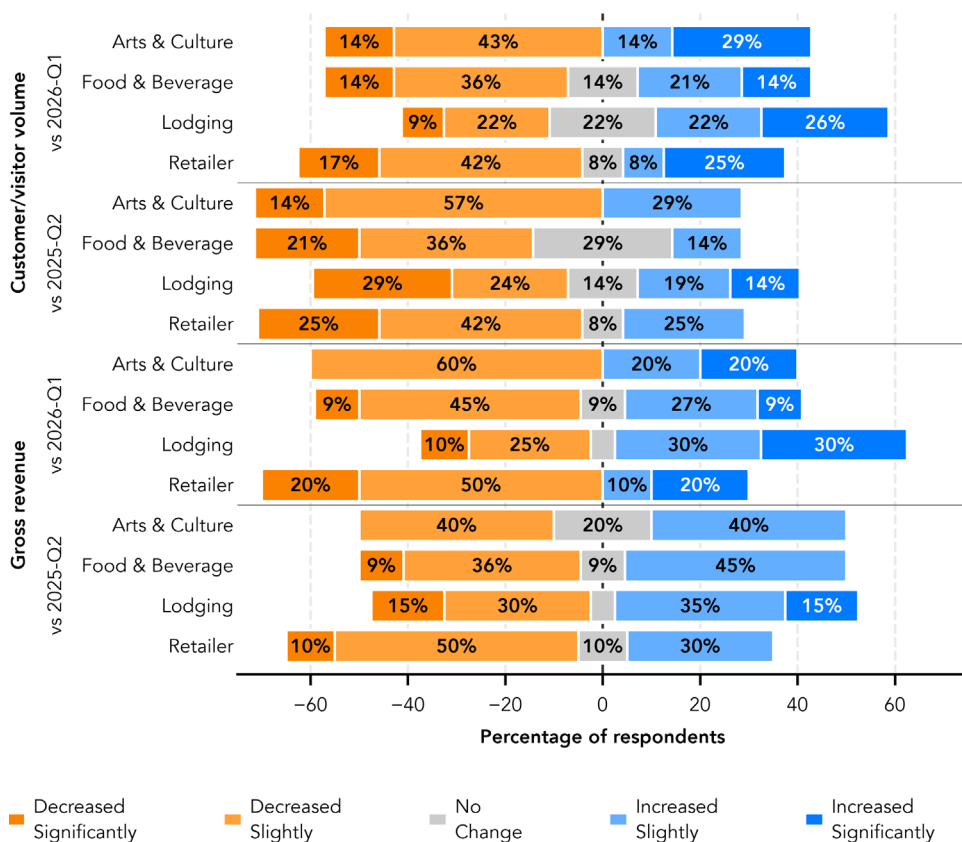


Fig. 11. Change in Visitor/Customer Volume and Revenue.

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2026-Q2

Industry Trends

Opportunities and Threats for 2026-Q3

Industry priorities varied more than the statewide averages suggest. Emerging markets and customers were selected by 83% of arts and culture respondents, 60% of retailers, 42% of food and beverage businesses, and 35% of lodging respondents. Online marketing was strongest among food and beverage businesses at 50%, followed by lodging at 45%, retail at 40%, and arts and culture at 33%. Rising costs were the leading threat in every sector, ranging from 57% in lodging to 75% in retail; food and beverage registered 69% and arts and culture 71%. Labor

shortages were especially prominent in arts and culture (57%) and retail (50%), while reduced demand was more pronounced in retail (42%), lodging (38%), and food and beverage (38%) than in arts and culture (14%) (Figure 12).

Overall, the quarter closed with uneven performance, persistent cost pressure, and a clear need for market-specific growth strategies.

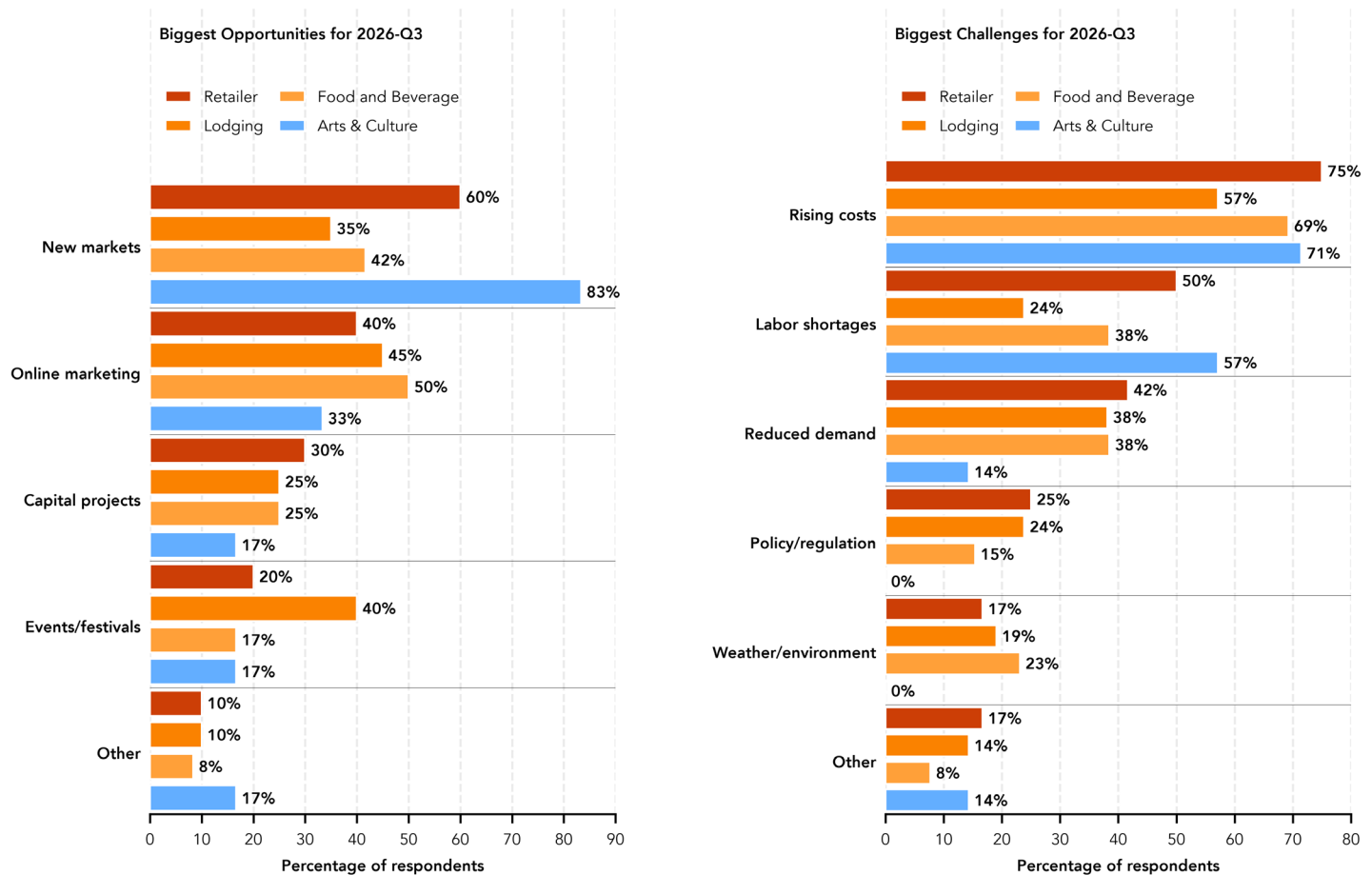


Fig. 12. Biggest Opportunities and Challenges for the Upcoming Quarter (2026-Q3).

“ Our guests from outside of Utah say their news on the fires in the west make it appear that the entire state is on fire. People overseas as well as the domestic market are getting news information that is not accurate for our area. Overseas, the message is that America is unsafe and expensive, and domestically, the message is the state is on fire. We have tried to counter those messages, but one voice out of hundreds makes it feel fruitless. ”