

Utah Visitor Profile & Insights

Calendar Year 2025 Report



Prepared for:
Utah Office of Tourism
July 2026



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Key Takeaways

More travelers chose Utah in 2025 (+8%) – that's real, and it matters. But the growth is coming from out-of-state visitors who already know Utah, are staying for shorter trips, and spending less while they visit. First-timers – the lifeblood of long-term destination growth – shrank as part of the mix.

The headline number is good. The story underneath it is a call to action.

Utah has successfully positioned itself as a go-to repeat destination for out-of-state travelers. The next challenge is converting that familiarity into longer, richer, higher-value visits – and rebuilding the pipeline of first-timers who become the repeat visitors of tomorrow.

The strategic question for 2026 isn't how to get more people to think of Utah. It's how to get the people already thinking of Utah to do more when they arrive.

Results Summary



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A Deeper Dive

Utah had a strong year for visitors. The opportunity is making those visits count for more.

Utah attracted more out-of-state visitors in 2025 than any year in recent memory, and total person trips rose 8%. That's a real win. But the visitors driving that growth weren't the same kind of visitors Utah has historically relied on to generate economic impact – and the difference shows up clearly in the numbers.

The 2025 out-of-state visitor increasingly looks like this: someone who has been to Utah before, drove in from a neighboring state, spent a long weekend visiting family or friends, and came back specifically for an outdoor experience they already knew they loved. VFR jumped from 30% to 36% as a top motivation. Personal vehicle arrivals rose from 56% to 61%. More visitors took overnight trips – 91% versus 84% the prior year – but average nights fell from 4.3 to 3.9, the footprint of a long weekend rather than a vacation. Stays with family and friends rose; hotel stays fell. Outdoor activities climbed as a motivation; exploring somewhere new declined.

All of this flows directly into the spending number. Per-party spending fell from \$1,022 to \$897 – not because Utah lost its appeal, but because the visitor mix shifted toward the lower-spending traveler archetype. Visitors who drive in, stay with family, and return to a known experience don't generate as much hotel revenue, don't build multi-destination itineraries, and don't need much convincing to come back. They're already sold on Utah. They're just not spending deeply when they get here.

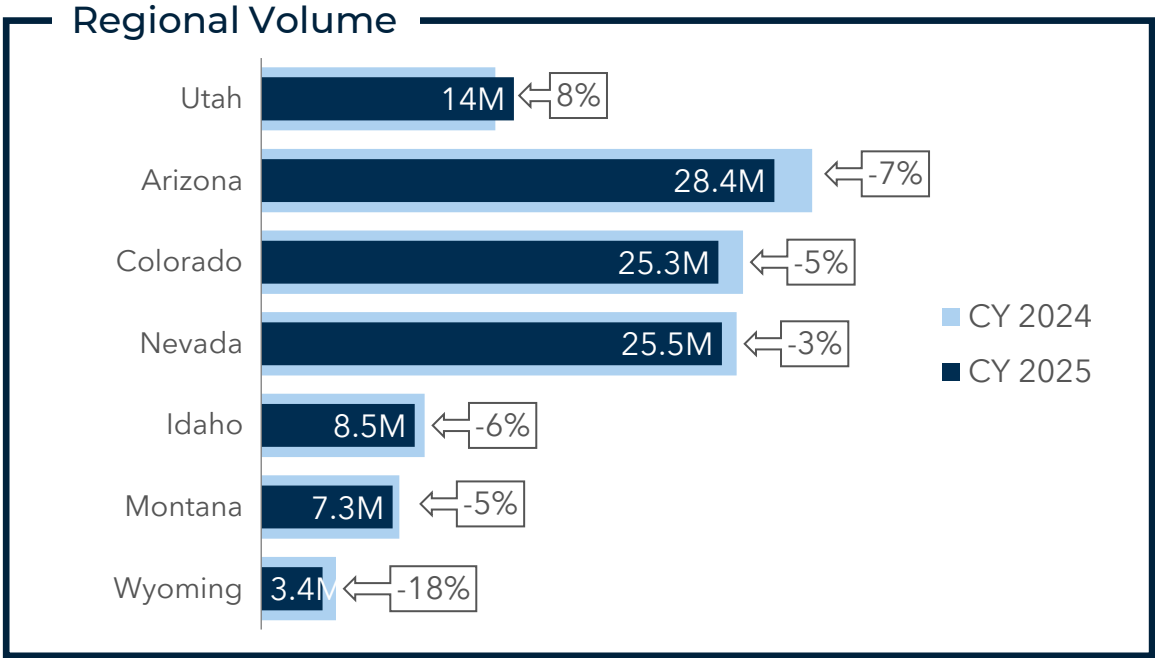
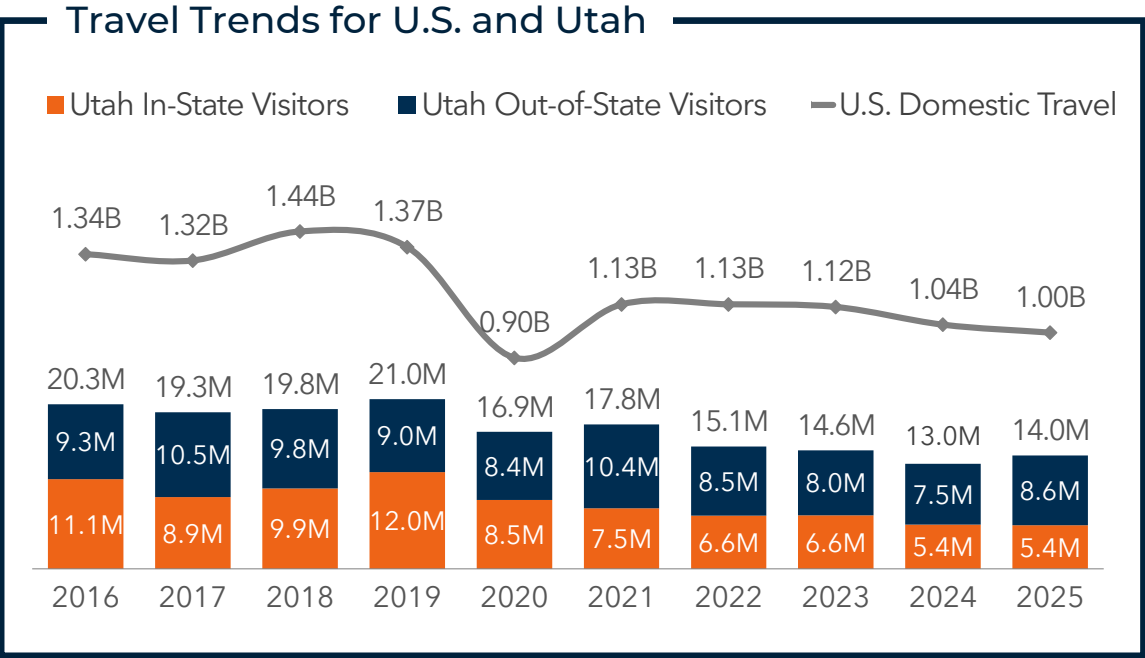
The strategic opportunity is clear: Utah has built a loyal audience. The next step is converting that loyalty into longer, richer, higher-value visits – and rebuilding the pipeline of first-timers who become tomorrow's returning visitors.

Utah doesn't have an awareness problem. It has a depth problem. And that's a marketing challenge with very actionable solutions.

As overall domestic travel pulls back, Utah visitation grows

Despite a decline in national domestic travel (-4%), Utah saw an 8% increase in visitation in 2025. Not only did Utah grow its visitor volume amid a backdrop of national decline, it outperformed neighboring states as well. From Nevada (-3%) to Wyoming (-18%), Utah outpaced its regional competitors in terms of visitor volume growth for 2025.

Furthermore, Utah’s growth in visitor volume was driven entirely by out-of-state visitation. Utah in-state visitation for 2025 remained flat compared to 2024, while out-of-state visitation climbed by roughly 1 million visits.



Utah residents left home more in 2025, but still found time to vacation within their home state

Utah's growth in 2025 was driven by increased arrivals from California, Nevada, Idaho, Texas, New York, and Arizona, nearly all of which posted double-digit year-over-year increases in travel to Utah.

In addition to increased visitor volume to the state, Utah residents also traveled more in 2025 than they did the year before, showing an 8% increase in outbound trips.

Utah Person-Trips by Origin State

	2024	2025		Difference	% Change
Utah	5.4M	5.4M ▼		-70K	-1%
California	1.3M	1.6M ▲		+295K	+22%
Colorado	785K	533K ▼		-252K	-32%
Nevada	755K	987K ▲		+232K	+31%
Idaho	617K	911K ▲		+294K	+48%
Wyoming	441K	279K ▼		-162K	-37%
Texas	390K	424K ▲		+34K	+9%
Washington	387K	113K ▼		-274K	-71%
Florida	337K	284K ▼		-53K	-16%
Illinois	325K	229K ▼		-96K	-30%
New York	307K	393K ▲		+86K	+28%
Arizona	254K	646K ▲		+392K	+154%

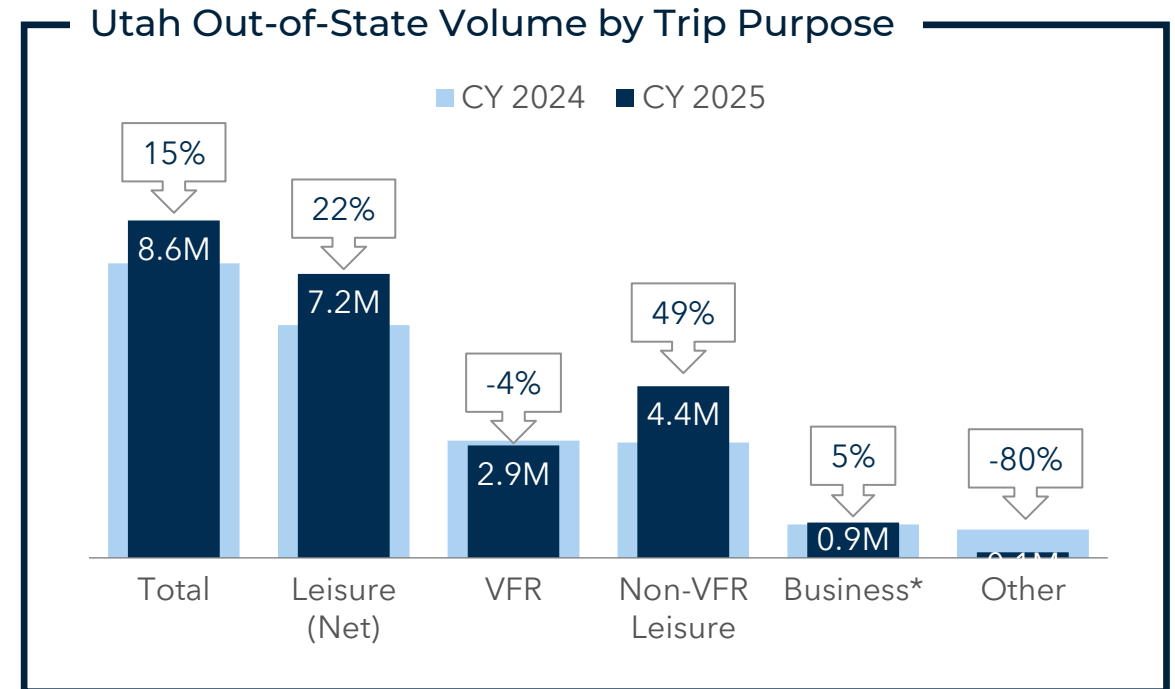
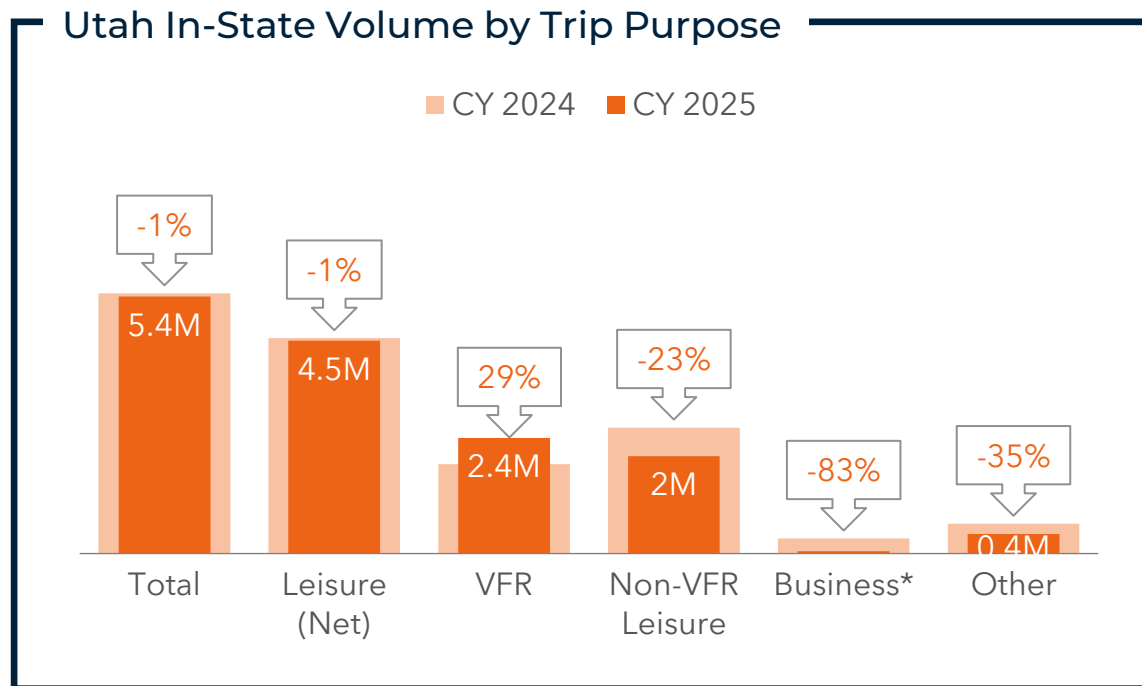
Outbound Person-Trips from Select States

	2024	2025		Difference	% Change
Utah	10.9M	11.8M ▲		+918K	+8%
California	123M	118M ▼		-5.8M	-5%
Colorado	21.6M	18.2M ▼		-3.4M	-16%
Nevada	6.5M	8.8M ▲		+2.4M	+37%
Idaho	6.1M	5.8M ▼		-308K	-5%
Wyoming	2.4M	2.1M ▼		-308K	-13%
Texas	89.5M	86.9M ▼		-2.5M	-3%
Washington	26.0M	23.5M ▼		-2.5M	-10%
Florida	59.2M	62.9M ▲		+3.7M	+6%
Illinois	36.3M	34.7M ▼		-1.6M	-4%
New York	54.5M	52.9M ▼		-1.6M	-3%
Arizona	21.0M	20.2M ▼		-786K	-4%

Non-VFR leisure from Out-of-State visitors drives overall growth in 2025 visitor volume

In-state volume remained largely flat for 2025, but shifts did occur between VFR and Non-VFR leisure travel. Business travel for 2025 decreased significantly year-over-year (-83%), but this did not move the needle much for total in-state volume.

Among out-of-state visitors, volume increased by 15% in 2025. This increase was driven by a 49% increase in Non-VFR leisure travel, contributing to a 22% increase in net leisure travel.

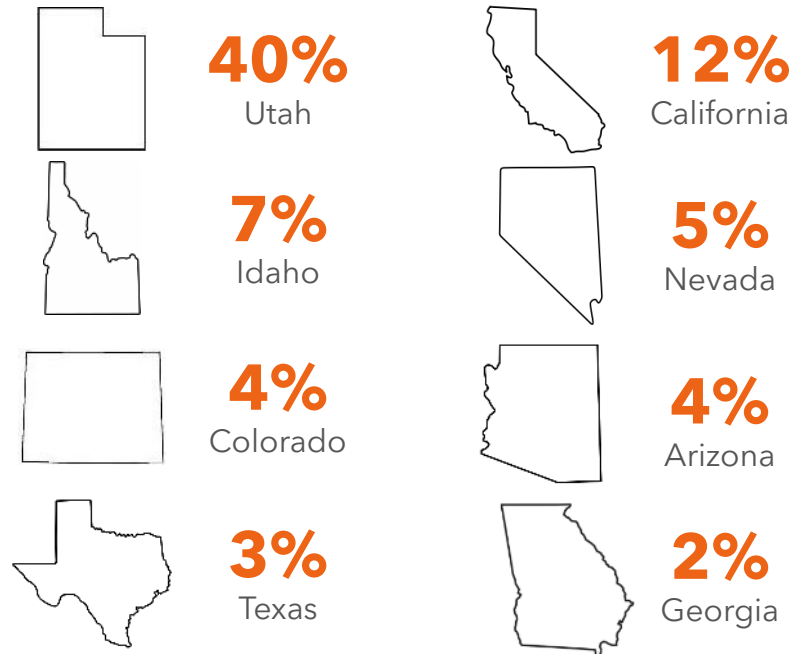


*Sample Size <30.

Two-thirds of Utah's visitors travel reside in nearby markets

Although Utah's visitor base is dominated by those residing from Utah or nearby states, shifts in visitation still occur. Residents of the Salt Lake City DMA continue to lead Utah travel, making up 41% of all trips to the state, down slightly from the previous year. Utah saw increased visitation from Texas and Georgia in 2025, making up a combined 5% of visits.

Top Utah Visitor Source Markets



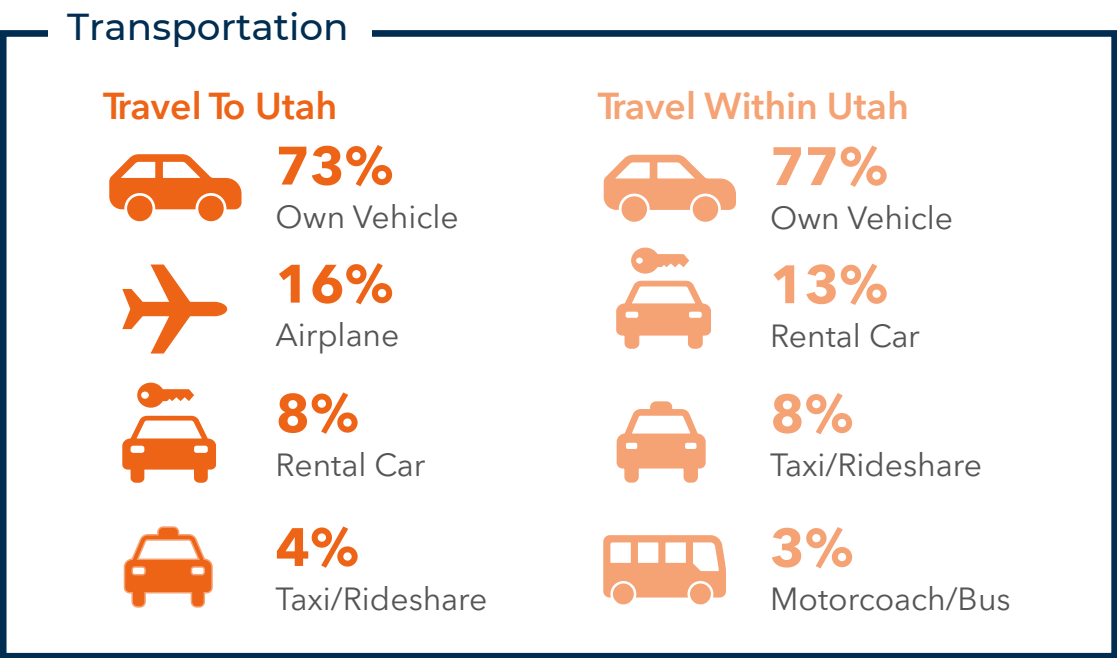
Top Origin DMAs

1	Salt Lake City	41%
2	Los Angeles	6%
3	Las Vegas	4%
4	Idaho Falls-Pocatello	4%
5	Phoenix	3%
6	Denver	3%
7	Dallas-Fort Worth	2%

With so many visitors residing in nearby states, nearly three-quarters traveled to Utah in their personal vehicle

Most travelers to Utah arrived in their own vehicle (73%), while 16% flew to their destination. When traveling within the state, their own vehicle (77%), a rental car (13%), and taxi/rideshare (8%) were the most popular modes of transportation.

Many of Utah’s top destinations attracted a lower proportion of visitors than the prior year. Likely contributing factors to the decline is that visitors were less likely to visit multiple Utah destinations on their trip.



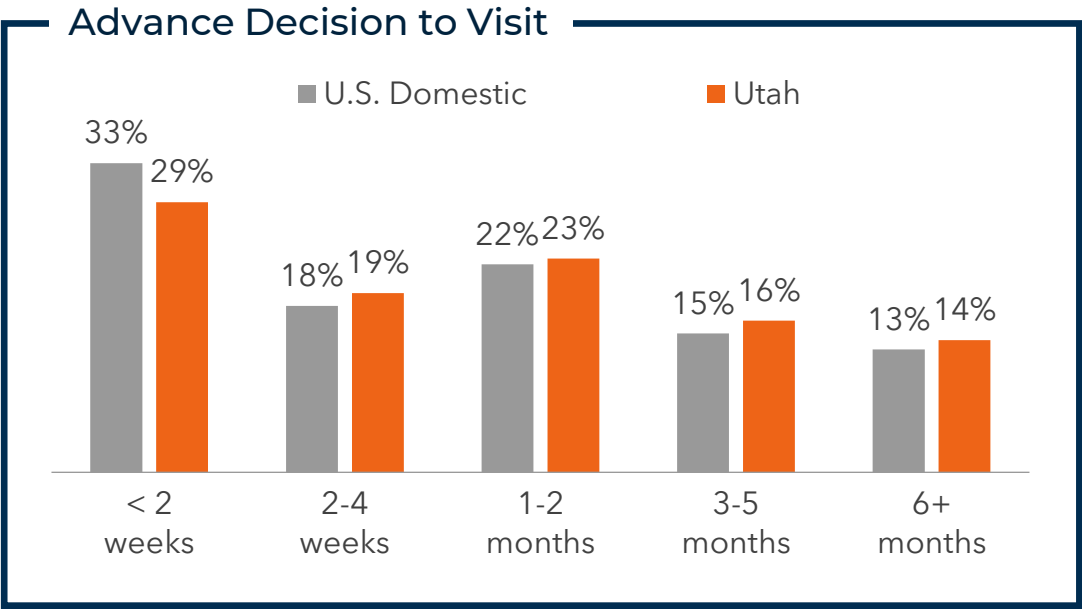
Top Utah Destinations

	CY 2024	CY 2025
 Salt Lake City	32%	30%
 St. George	13%	15%
 Park City	11%	9%
 Provo/Orem	11%	10%
 Moab	9%	10%
 Zion/Springdale	8%	8%
 Bryce Canyon	8%	7%

Travel decision timing holds steady among Utah visitors, while their top planning sources begin to stabilize

Around half of Utah and overall domestic visitors made the decision to travel less than a month before their trip, on par with prior year levels. Despite little year-over-year change with trip timing, there was some movement around the top trip planning sources.

Utah visitors were more likely to use their own experience (+7 pts) in trip planning than in the previous year. Among overall domestic travelers, there was little movement at all compared to the previous year.

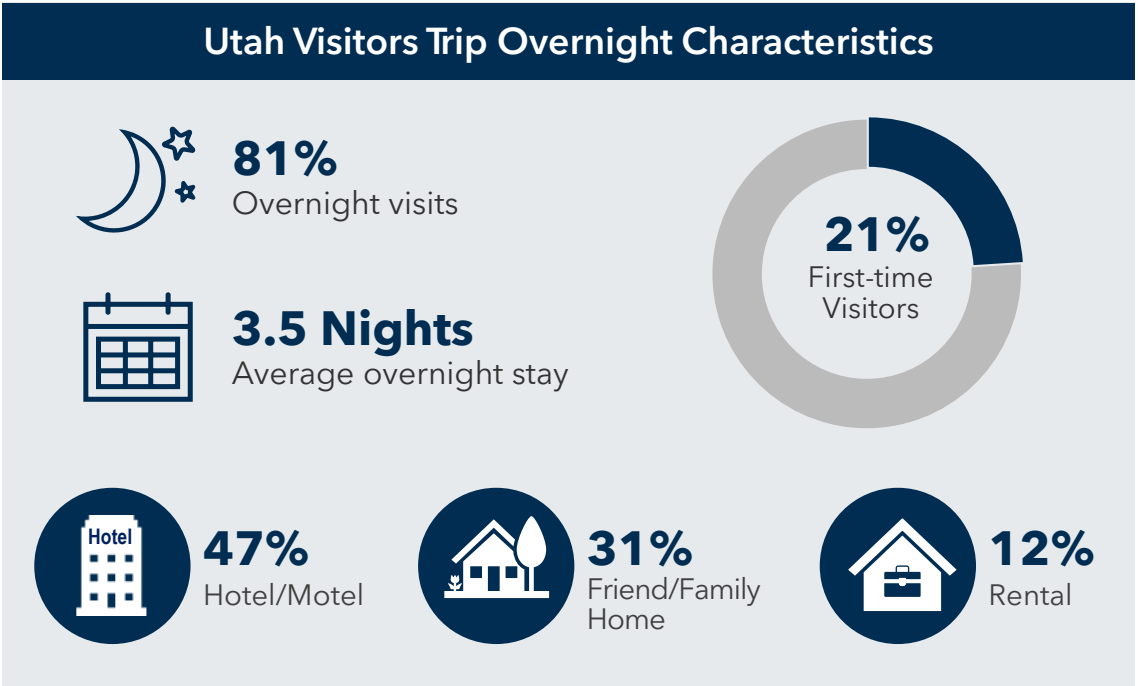
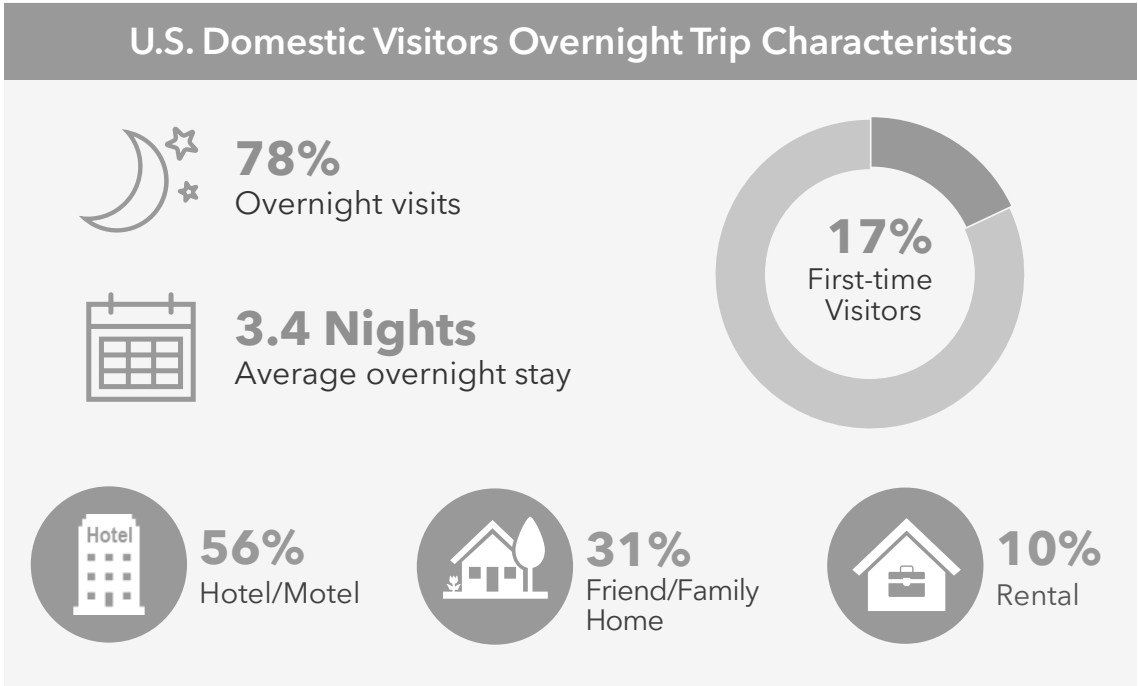


Top Trip Planning Sources

	U.S. Domestic	Utah
1 Own experience	35%	39%
2 Friends/relatives	35%	37%
3 No plans made	23%	20%
4 Search engines	14%	18%
5 Destination website	8%	8%
6 Online Travel Agency	6%	6%
7 Social media platforms	6%	5%
8 Someone else planned, don't know	4%	4%

Utah visitors carry their 2024 travel habits into the new year

Utah’s overnight visitors averaged 3.5 nights in the destination, putting it on par with the national average of 3.4 nights. Despite the slight downturn in length of stay compared to the prior year (-0.2 nights), accommodation type usage in 2025 matched 2024 across all types.



Note: Hotel/motel includes B&B.

Utah visitors increase their outdoor activity participation, continuing to outpace U.S. domestic travelers

Utah visitors were more likely than overall domestic travelers to travel with a spouse and with friends, which contributed to a greater average travel party size (3.0 vs 2.6) than the U.S.

During their trip, Utah visitors engaged in a wider variety of outdoor activities– such as visiting National/State parks, hiking/backpacking, and rural sightseeing– than U.S. domestic travelers.

Travel Party Composition		U.S. Domestic	Utah
	Alone	22%	19%
	Spouse/Significant Other	54%	59%
	Children	36%	36%
	Friend(s)	11%	11%
	Other family members	18%	18%
	Other	2%	2%
Average Party Size		2.6	3.0

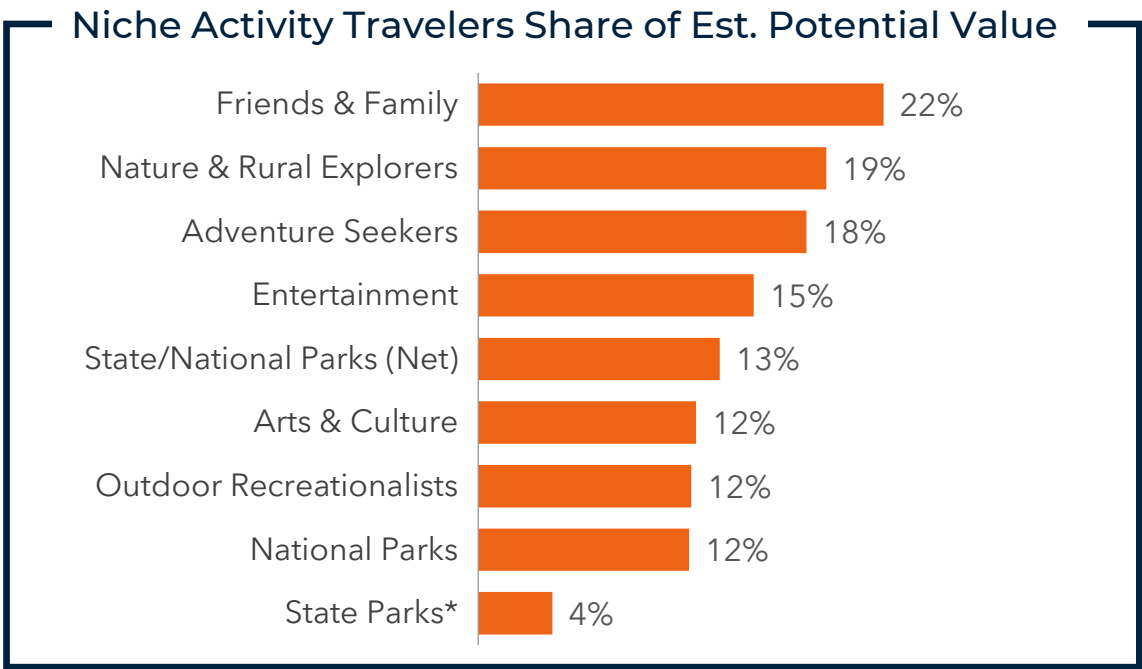
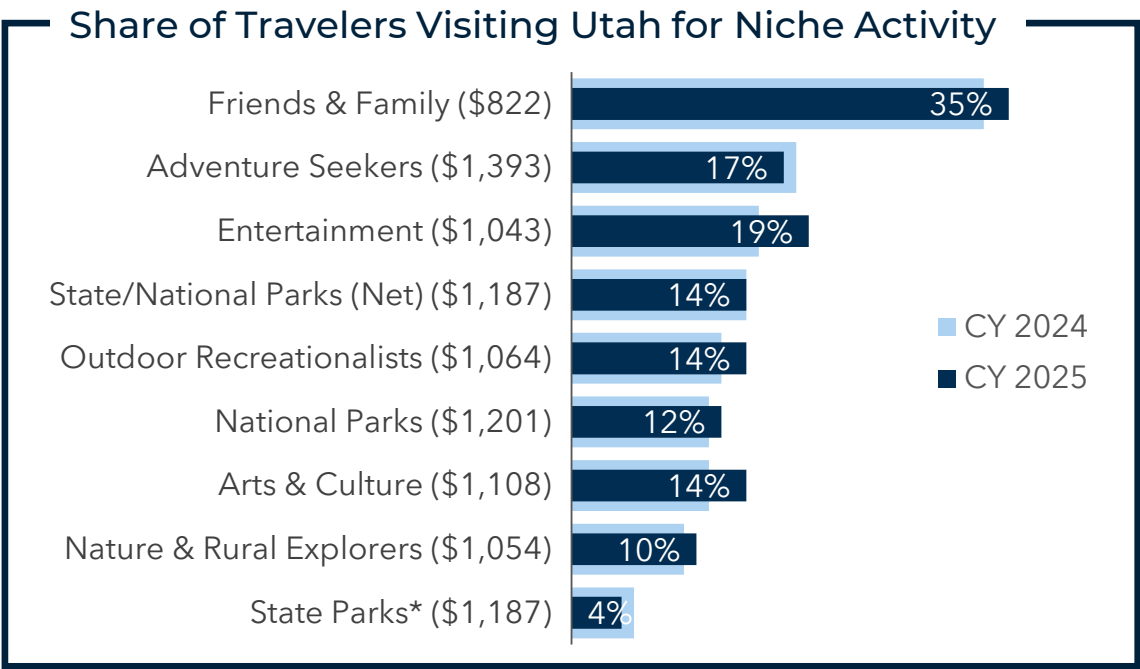
Top Activities		U.S. Domestic	Utah
	Visiting friends/relatives	33%	34%
	Hiking/Backpacking	9%	21%
	National park/Monument/Rec areas	7%	19%
	Shopping	20%	16%
	Historic sites	14%	15%
	Rural sightseeing	10%	14%
	State park/Monument/Rec areas	8%	11%
	Wildlife viewing	7%	11%

Note: Travel party composition is not mutually exclusive.

Most of Utah's niche activity visitors spent more on average in CY 2025

Average travel party spend eclipsed \$1,000 in CY 2025 for all but one of the niche segments—Friends & Family.

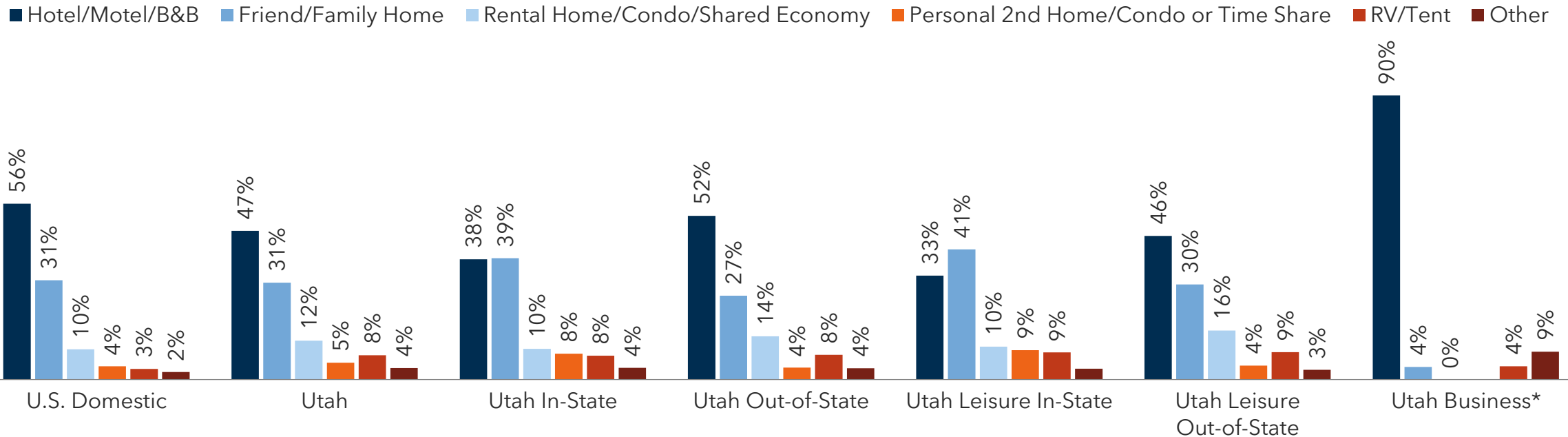
Despite having the lowest average spend among the segments, the group's significant share of travelers led to them having the highest potential value, followed closely by Nature & Rural Explorers and Adventure Seekers.



Note: Since it's possible for an activity as a primary or secondary reason for visiting to fall in different niche activity groups (see glossary for niche category definitions), some overlap will exist.
**Sample <30*

Utah overnight visitors use hotels less than U.S. domestic travelers, opting instead to stay in RVs and tents

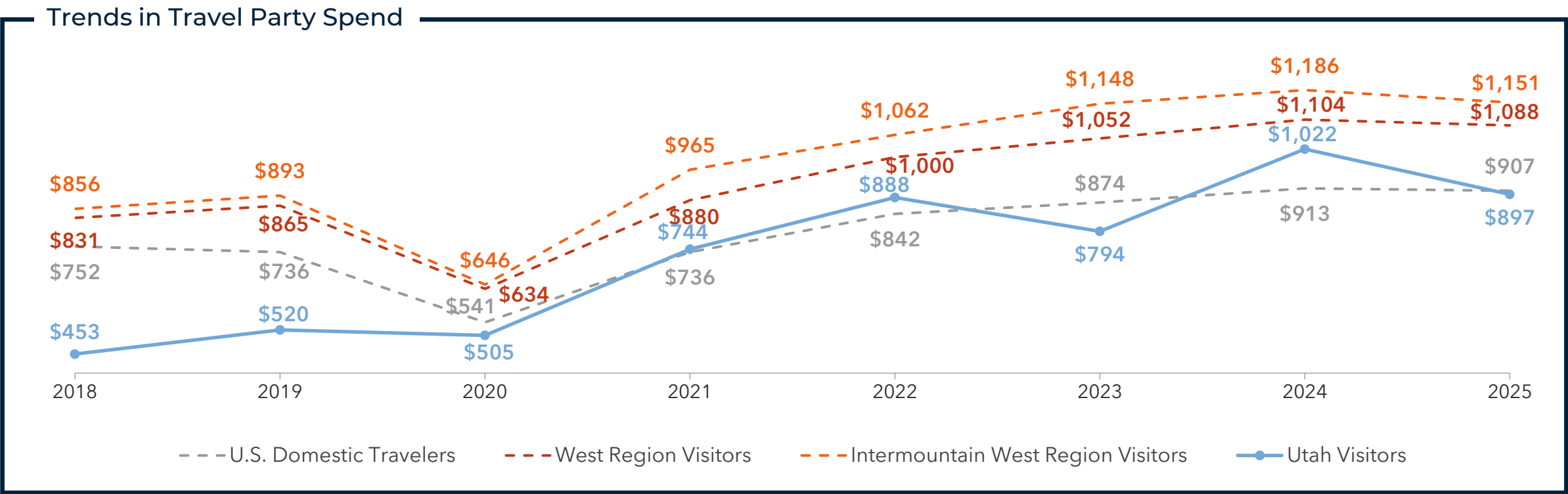
Overnight Visitor Accommodations



*Sample Size <30.

Compared to the prior year, Utah travel party spending eased in 2025, falling in line with overall U.S. domestic traveler spending

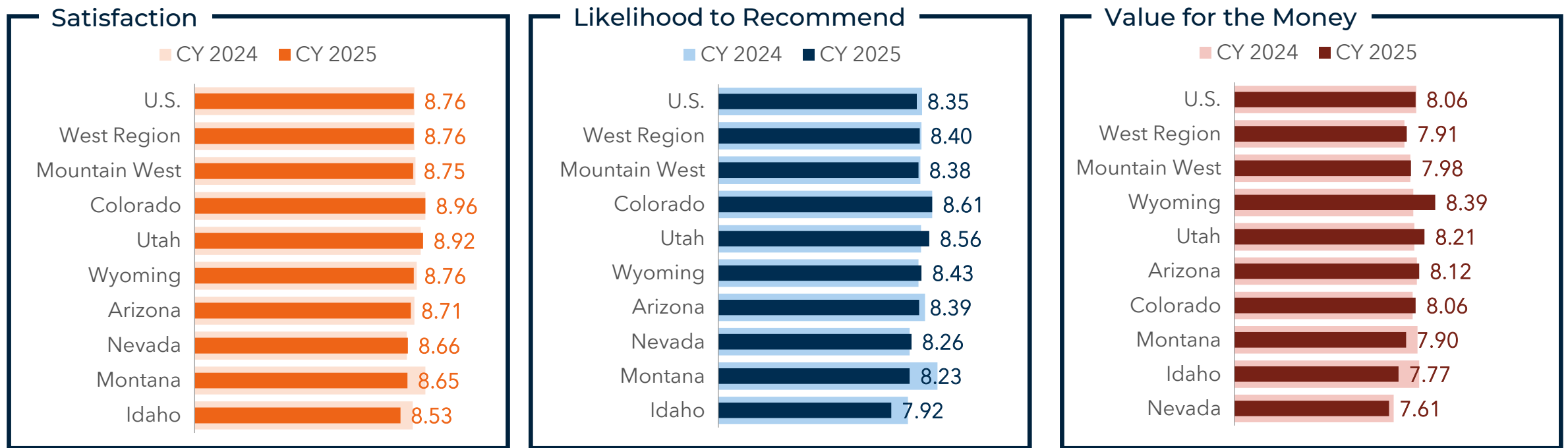
Among Utah visitors, travel party spend averaged \$897, which was \$125 less than the prior year. Spend decreased among overall domestic travelers, West Region, and Intermountain West Region visitors, although not as much as Utah visitor spend.



Utah's trip satisfaction, likelihood to recommend, and value for the money ratings land near the top among competitors

Utah saw year-over-year increases in 2025 for ratings of satisfaction, likelihood to recommend and value for the money, and out-performed ratings for the U.S. overall, West Region, and Mountain West.

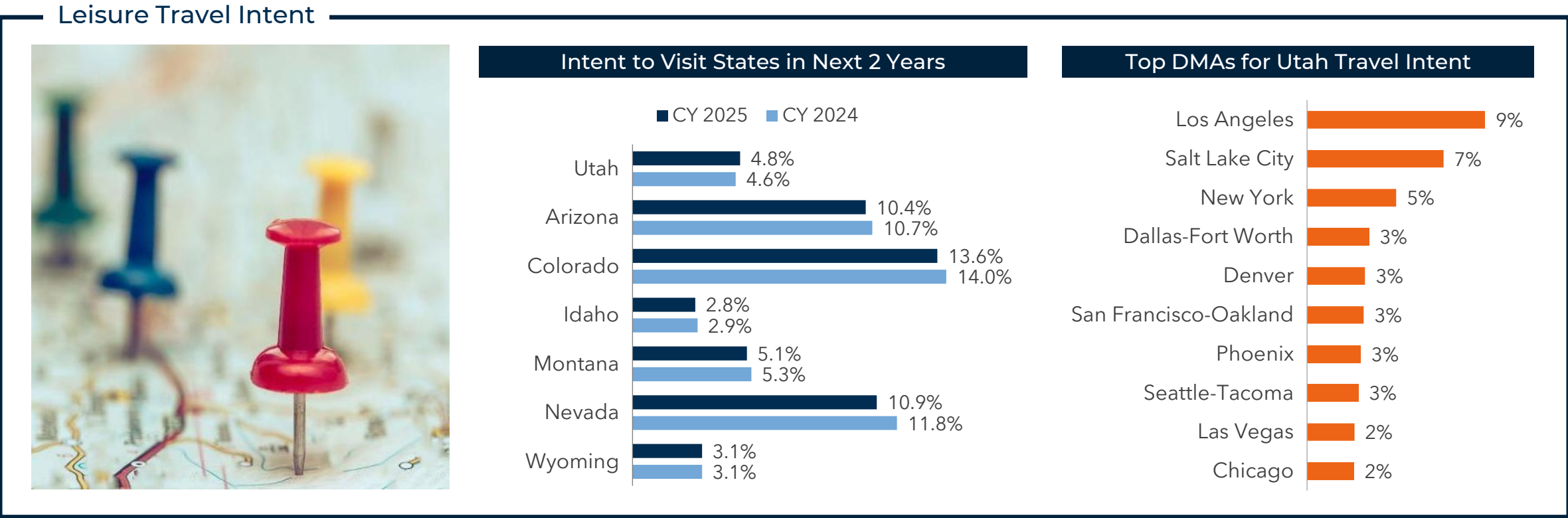
Compared to its competitive set, Utah ranked second for trip satisfaction, likelihood to recommend, and value for the money.



Note: Performance indicators are based on leisure trips to the destination.

Leisure travel intent to Utah continues to hover around 5%

Utah leisure travel intent increased from 4.6% to 4.8% in 2025 among U.S. travelers. Future leisure travel intent for Utah was highest among residents of nearby DMAs, such as Los Angeles (9%) and Salt Lake City (7%).



Note: San Francisco-Oakland-San Jose shortened to San Francisco-Oakland.



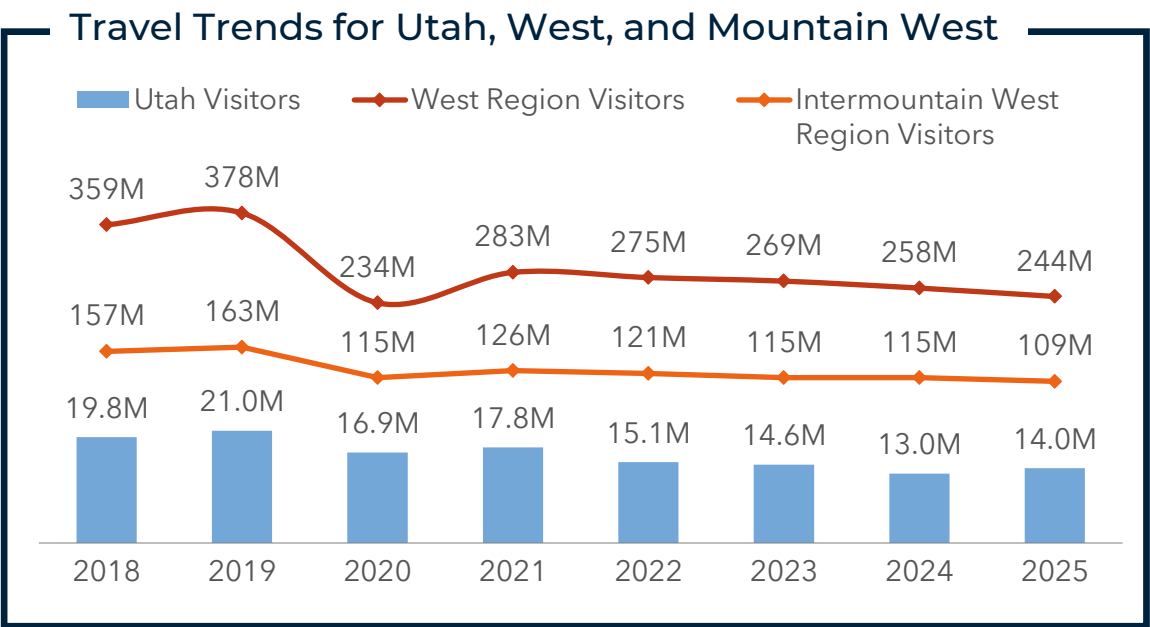
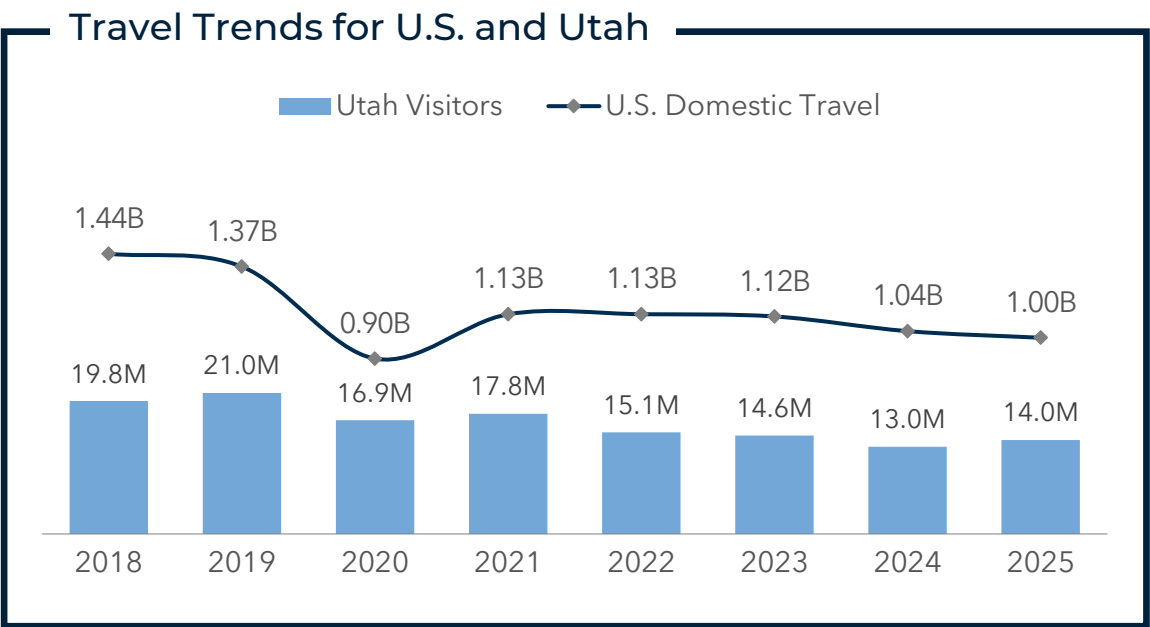
Detailed Results

Share of Visitors & Source Markets



As overall domestic travel pulls back, Utah visitation grows

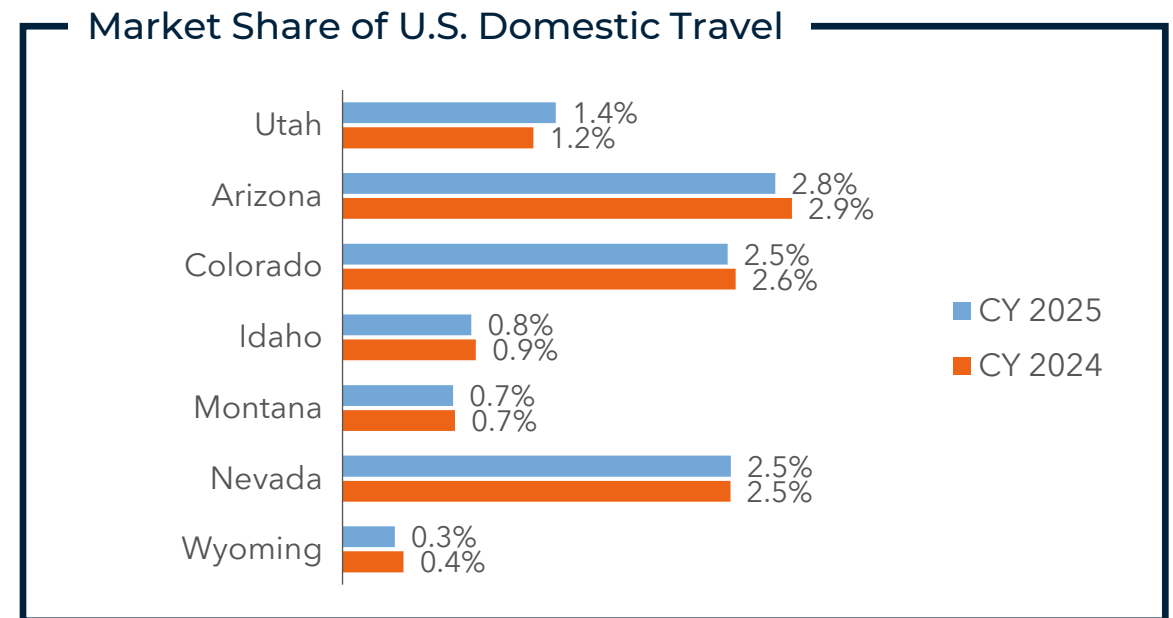
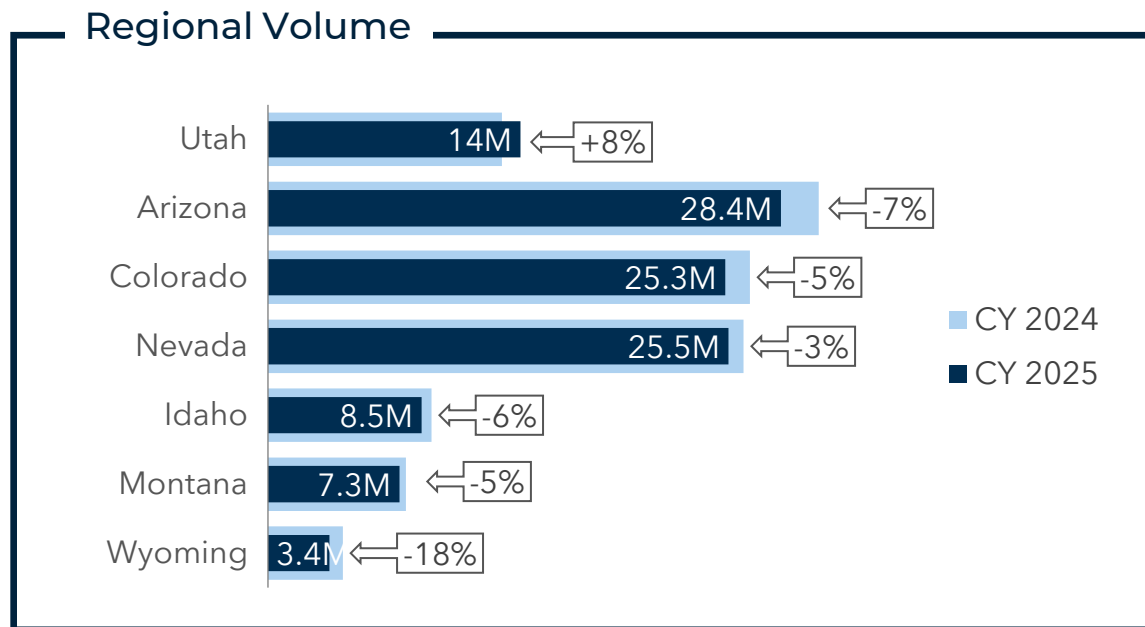
Against a backdrop of overall domestic travel decreases (-4%) compared to the previous year, Utah grew its visitor volume by 8% from 13 million to 14 million visitors in 2025. Utah managed to generate gains in visitor volume even as visitation to both the West Region and Intermountain West declined by 5% compared to the prior year.



Utah grows visitor volume and market share compared to 2024

Within its competitive set, Utah saw 8% growth in visitor volume even as its competitors saw declines. Utah was the fourth most visited destination among the competitive set, behind Arizona, Nevada, and Colorado.

Travel to Utah accounted for 1.4% of national domestic travel in 2025, up 0.2 points from 2024. Additionally, Utah was the only state in the competitive set to see an increase in market share.



Sources: TravelTrak America - Q4a. U.S. state(s) visited (in person-trips)

Proximity matters, Utah visitors primarily reside in nearby states

Although Utah's visitor base is dominated by those residing in Utah or from nearby states, shifts in visitation still occur. Among the top origin markets for Utah, there was an increase in travelers from California, Idaho, and Arizona compared to the previous year. Among the top DMAs, Los Angeles, Las Vegas, and Idaho Falls saw gains over the previous year.

Top Origin States for Utah Visitors by Year

		2022	2023	2024	2025
1	Utah	39%	40%▲	40%	40%
2	California	11%	10%▼	10%	12%▲
3	Idaho	9%	6%▼	5%▼	7%▲
4	Nevada	4%	4%	5%▲	5%
5	Colorado	4%	8%	5%▼	4%
6	Arizona	4%	3%▼	3%	4%▲
7	Texas	3%	3%	4%▲	3%▼
8	Georgia	1%	1%	1%	2%▲
9	Florida	2%	2%	3%▲	2%▼
10	Oregon	1%	1%	0%▼	2%▲

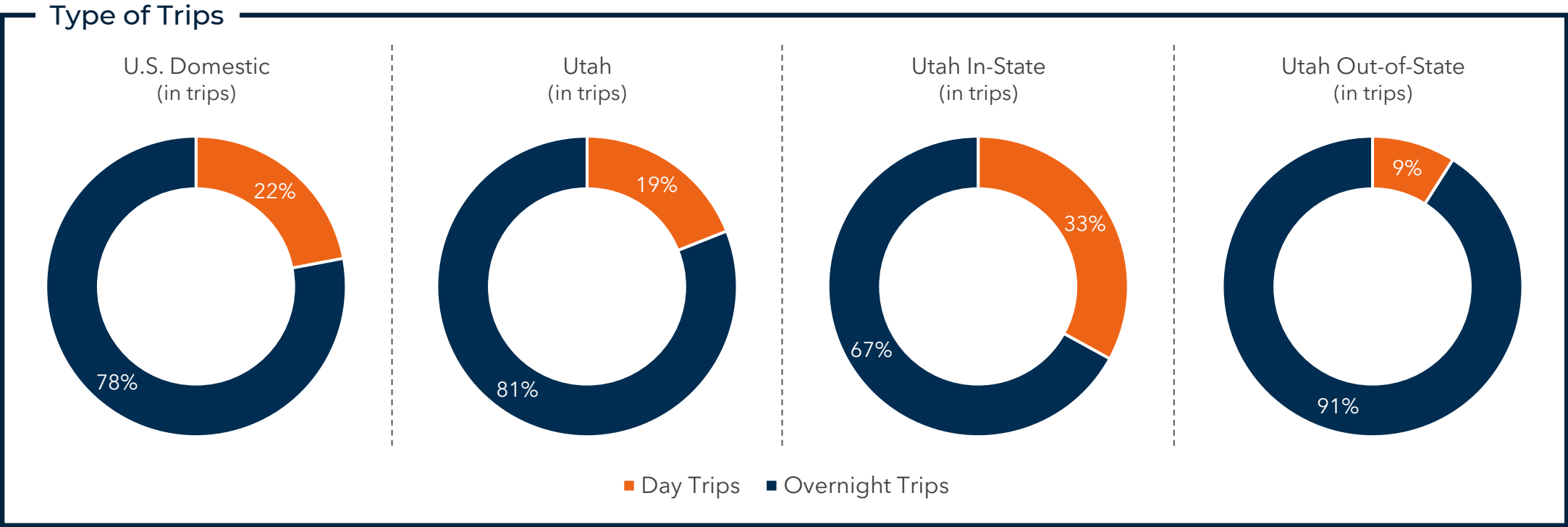
Top Origin DMAs for Utah Visitors by Year

		2022	2023	2024	2025
1	Salt Lake City	40%	42%▲	43%▲	41%▼
2	Los Angeles	5%	5%	5%	6%▲
3	Las Vegas	4%	3%▼	3%	4%▲
4	Idaho Falls-Pocatello	3%	3%	2%▼	4%▲
5	Phoenix	4%	3%▼	3%	3%
6	Denver	4%	6%▲	4%▼	3%▼
7	Dallas-Fort Worth	1%	1%	1%	2%▲
8	San Francisco-Oakland	2%	2%	2%	2%
9	Atlanta	1%	1%	1%	2%▲
10	Boise	3%	2%▼	2%	2%

Note: San Francisco-Oakland-San Jose shortened to San Francisco-Oakland.

As person trips grew, overnight trips captured a larger share of the Utah travel market

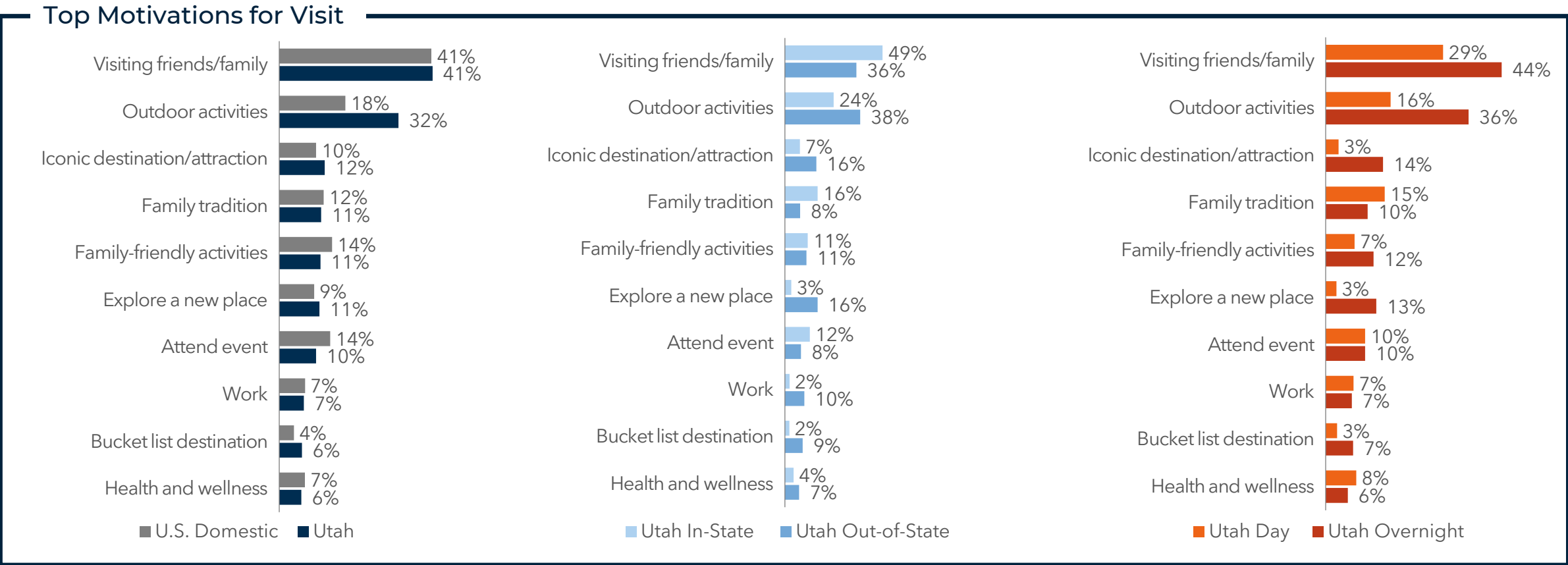
Year-over-year, day trips decreased as a share of Utah's total trips in 2025 (19%, -8 pts from 2024). Utah saw less day trips overall than the national average of 22%, and this was driven by a decrease in day trips both for in-state and out-of-state visitors.



Travel Motivations, Decision Timing & Trip Planning



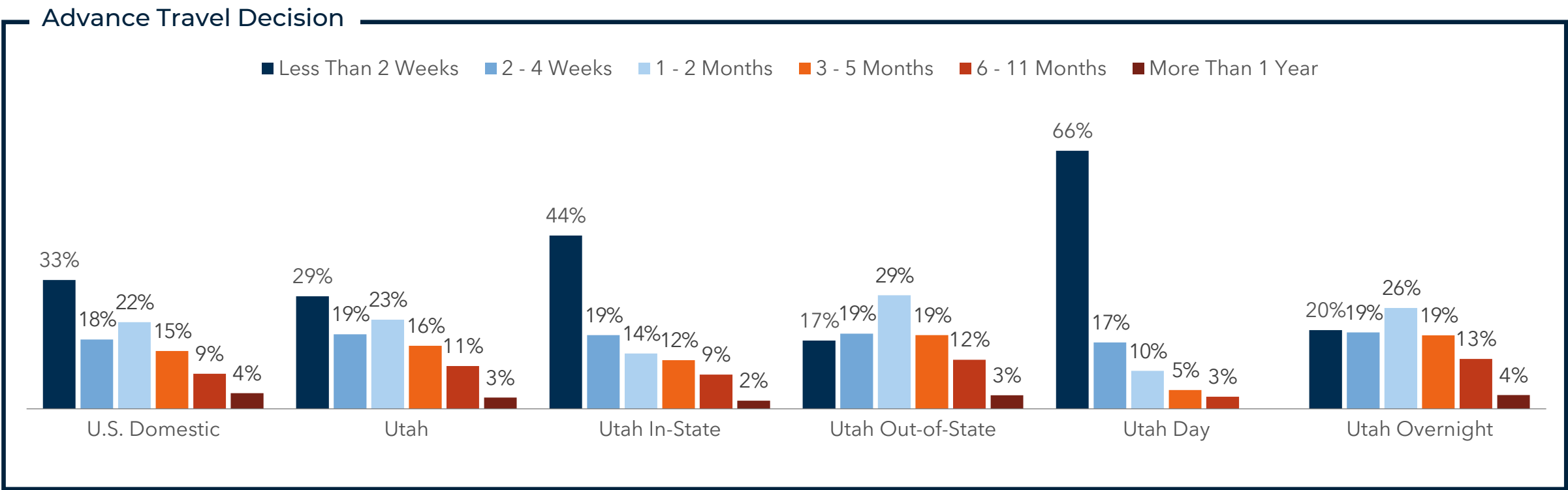
Utah visitors came to enjoy the outdoors, with nearly double the portion indicating it as their top motivation for visiting Utah (32%) compared to the national average (18%)



Note: Motivations for Visit differs from Activities as Primary/Secondary Reason for Visit.

Utah visitors trip decision timing aligned with overall domestic travelers

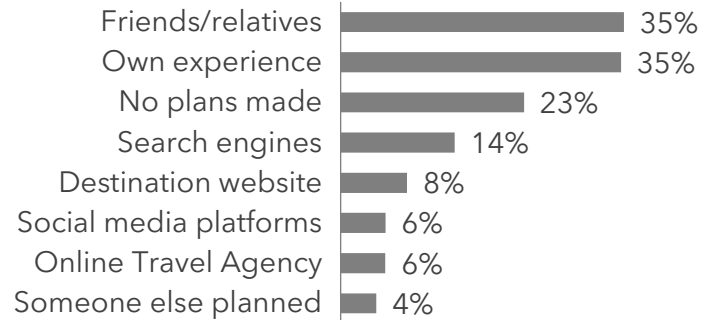
Visitors to Utah in 2025 were less impulsive than in the previous year, with only 29% deciding within 2 weeks of their trip compared to 33% of U.S. domestic travelers. Although Utah visitors overall took more time than last year to decide on their trip, Utah In-State travelers (44%) and Day trippers (66%) needed little time to make their decision.



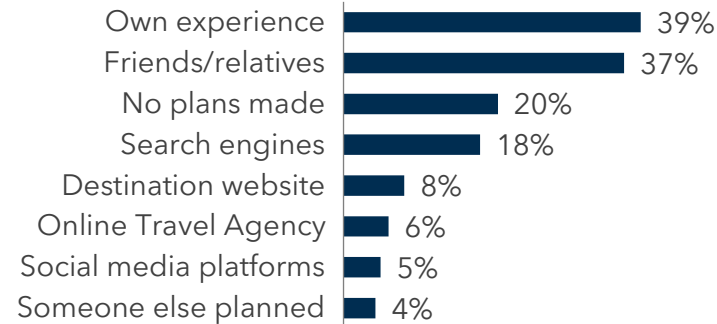
Domestic and Utah travelers leaned more on friends/relatives and their own experience when planning a trip than any other resource

Top Trip Planning Sources by Visitor Segment

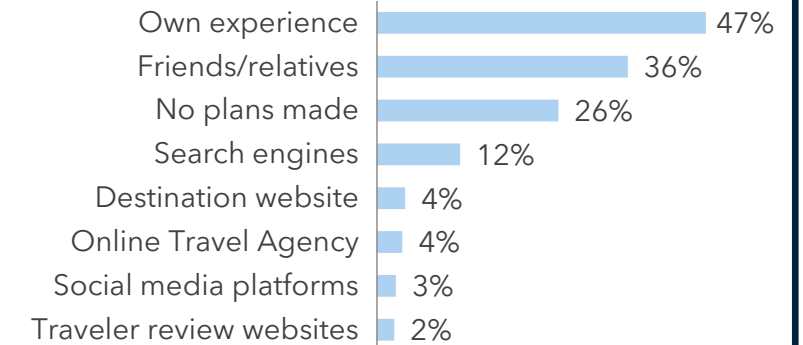
U.S. Domestic Travel



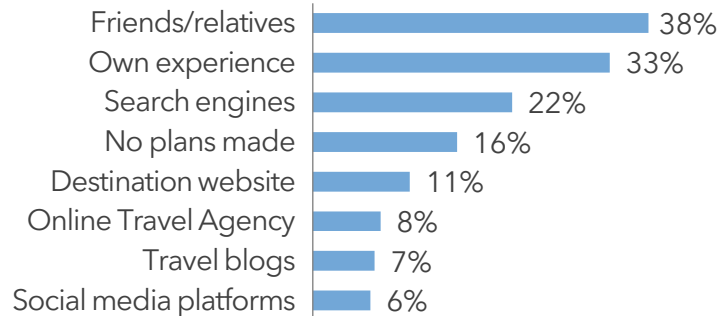
Utah



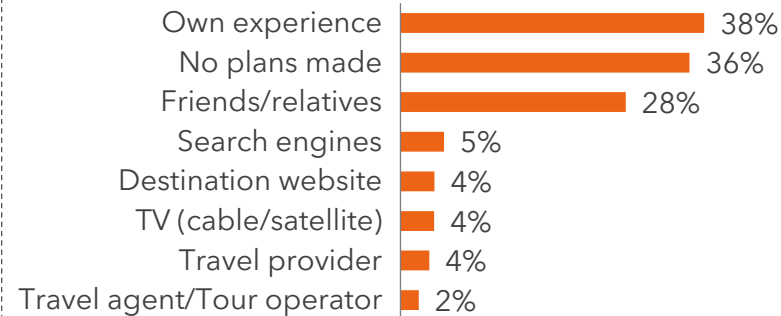
Utah In-State



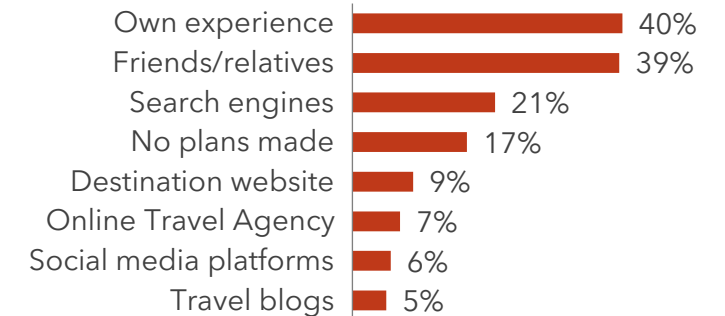
Utah Out-of-State



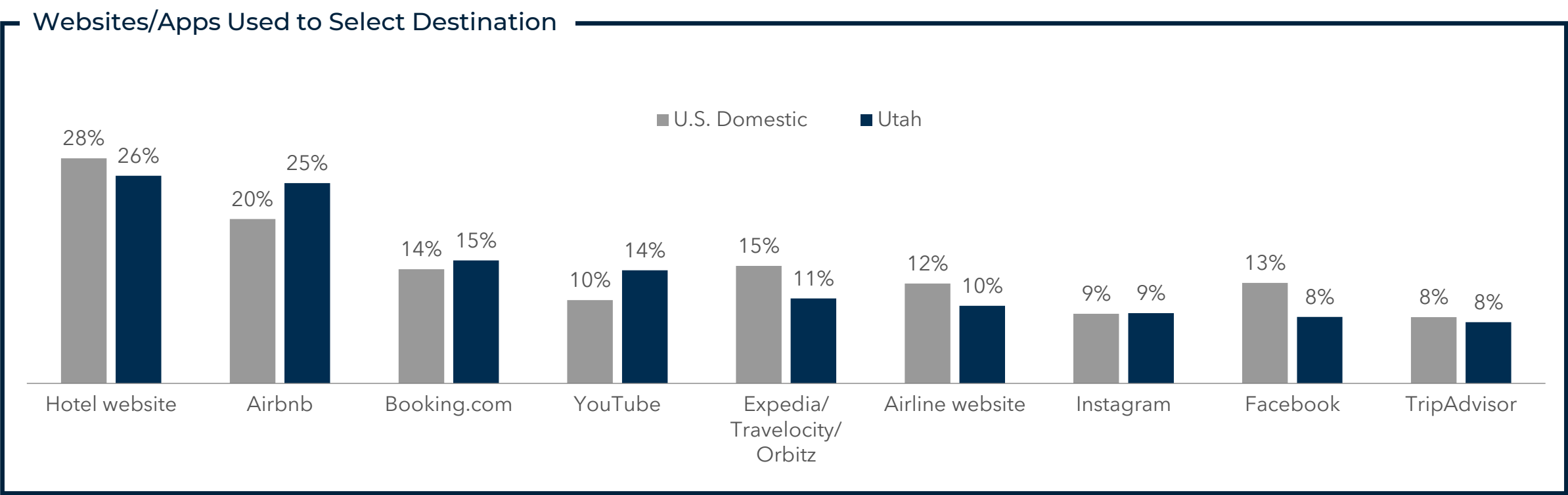
Utah Day



Utah Overnight

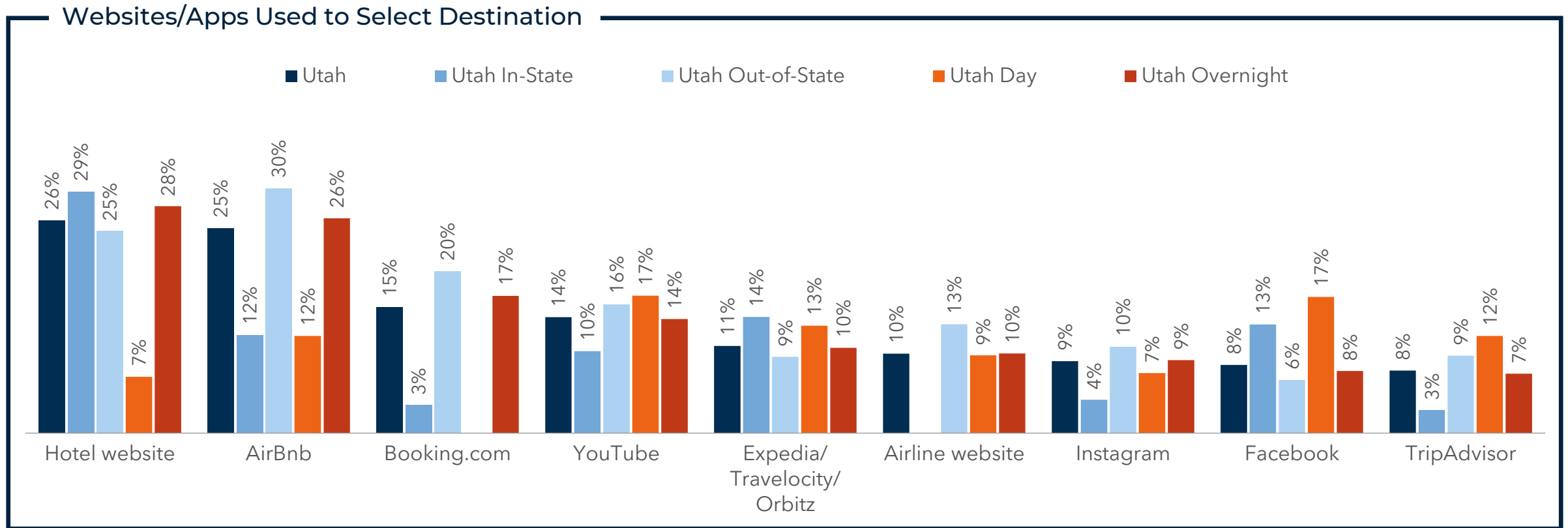


Hotel websites (+8 pts) reemerged as the most popular website/app used to select a destination among Utah visitors, though Airbnb remains more popular than the national average



Note: Figures shown reflect websites/apps chosen as being used to select destination.

While Hotel websites and AirBnb ranked as the top websites/apps used by overnight visitors to Utah, YouTube, Facebook and Expedia led the way for day trip visitors to the state



Note: Respondents are asked to select the websites/apps used throughout the trip planning process. Figures shown reflect websites/apps chosen as being used to select destination.

Trip Characteristics



Increases in trips to Visit Friends/Relatives increased notably among Utah In-State and Overnight Leisure Visitors

Primary Trip Purpose

	U.S. Domestic Travel		Utah Visitors	
	2024	2025	2024	2025
Leisure (net)	83%	84%	81%	84%
Visit Friends/Relatives	41%	41%	38%	40%
Outdoor Recreation	10%	10%	18%	19%
Entertainment/Sightseeing	17%	18%	12%	14%
Other Personal	15%	15%	13%	11%
Personal Business	5%	5%	5%	6%
General Business	8%	8%	10%	7%
Other	4%	3%	3%	3%

Leisure Trip Purpose Distribution

	Utah Leisure Visitors		Utah In-State Visitors		Utah Out-of-State Visitors		Utah Day Visitors		Utah Overnight Visitors	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
Leisure (net)	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Visit Friends/Relatives	47%	48%	47%	54%	47%	44%	46%	42%	46%	49%
Outdoor Recreation	22%	22%	19%	12%	24%	29%	10%	22%	26%	23%
Entertainment/Sightseeing	15%	17%	12%	14%	17%	19%	20%	14%	13%	17%
Other Personal	17%	13%	22%	20%	13%	9%	23%	24%	15%	11%

In line with national levels, most Utah visitors continue to travel to the state via personal vehicle

Transportation To

	U.S. Domestic	Utah	Utah In-State	Utah Out-of-State	Utah Day	Utah Overnight
 Personal Vehicle	73%	73%	91%	61%	85%	70%
 Airplane	16%	16%	1%	27%	2%	20%
 Rental Car	7%	8%	0%	13%	5%	8%
 Shared Economy/Taxi	4%	4%	2%	5%	2%	4%
 Motorcoach/Group Tour/Bus	3%	2%	1%	3%	2%	2%
 Camper/RV	2%	3%	1%	4%	1%	3%
 Other	7%	6%	7%	5%	13%	4%

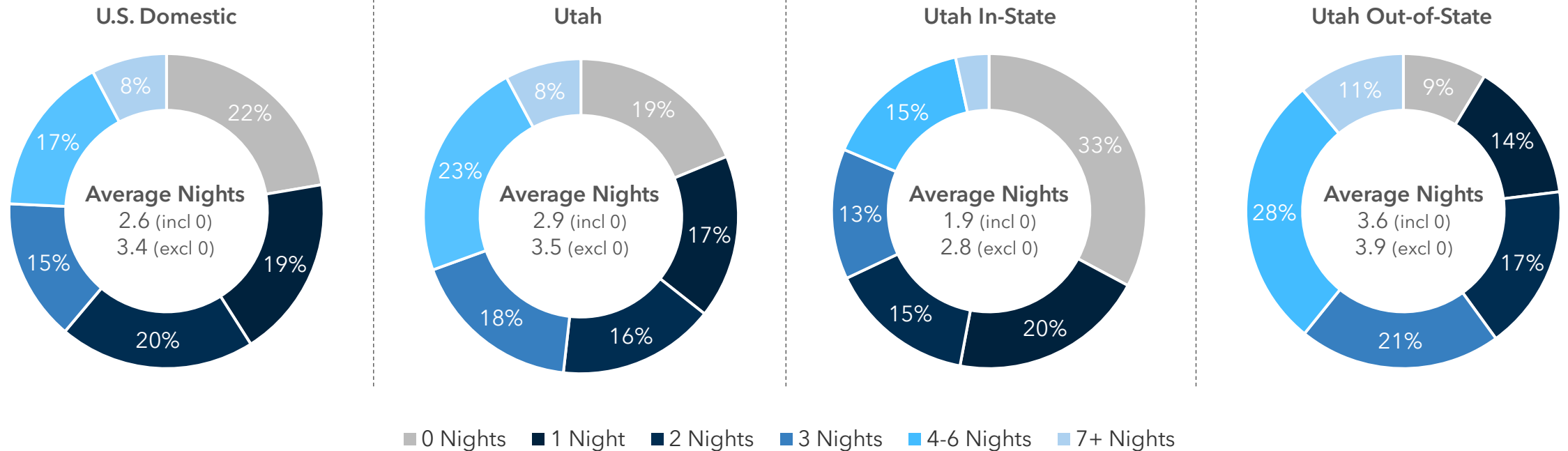
When traveling within the state, Utah visitors were more likely to use a personal vehicle compared to national levels

Transportation Within

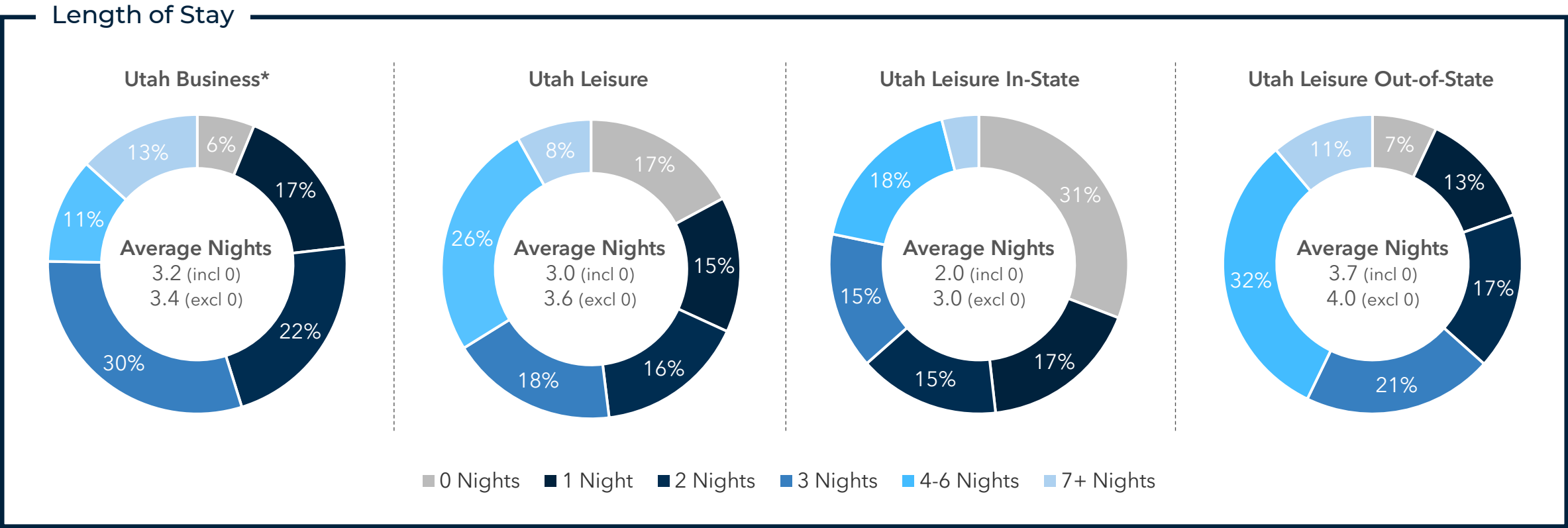
	U.S. Domestic	Utah	Utah In-State	Utah Out-of-State	Utah Day	Utah Overnight
 Personal Vehicle	75%	77%	96%	63%	89%	74%
 Rental Car	12%	13%	1%	21%	4%	15%
 Shared Economy/Taxi	10%	8%	1%	13%	2%	10%
 Motorcoach/Group Tour/Bus	4%	3%	1%	5%	3%	3%
 Camper/RV	2%	3%	2%	4%	3%	3%
 Other	9%	6%	3%	8%	9%	5%

Despite an increase in overnight trips compared to last year, overnight trip length of stay eased from 3.7 nights to 3.5 nights

Length of Stay

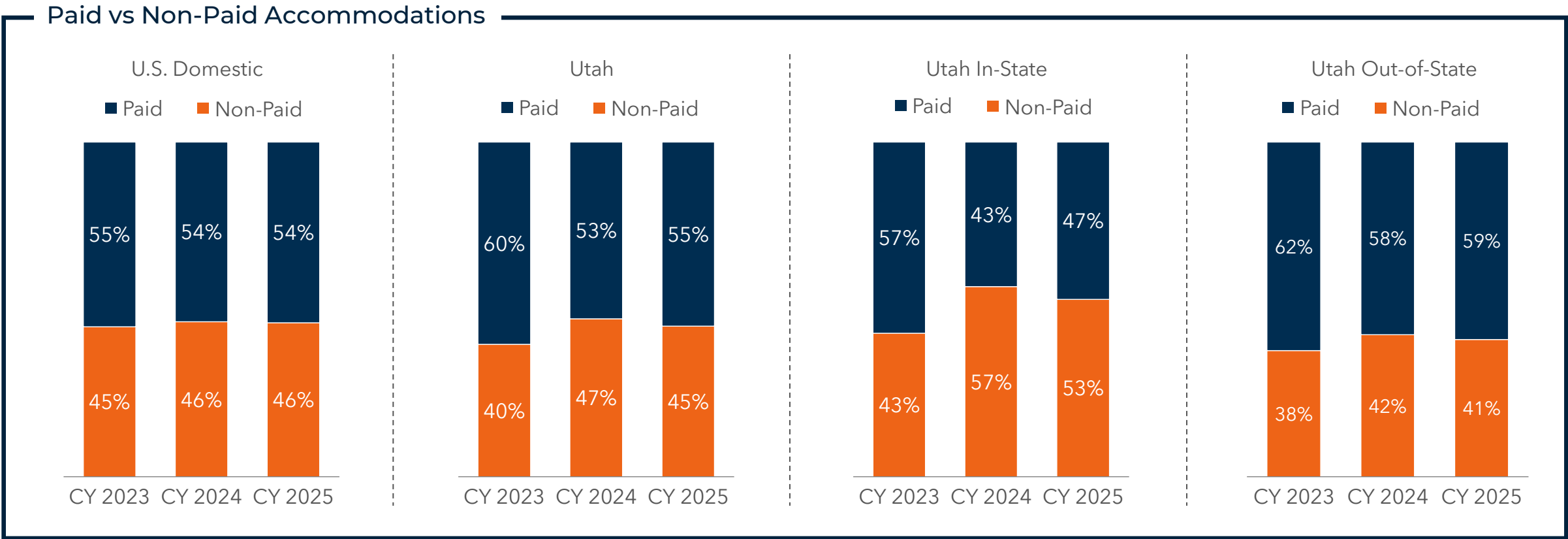


Utah leisure out-of-state visitors were influential in mitigating length of stay decreases, with an average length of stay of 3.7 nights

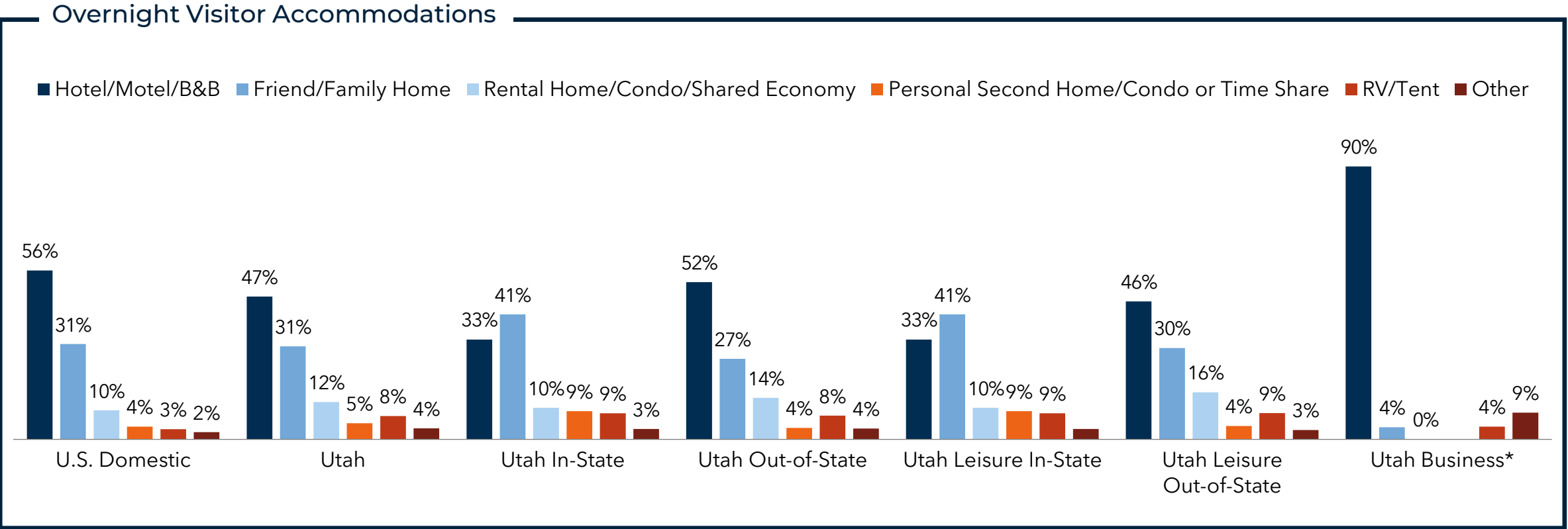


*Small sample size (n<50)

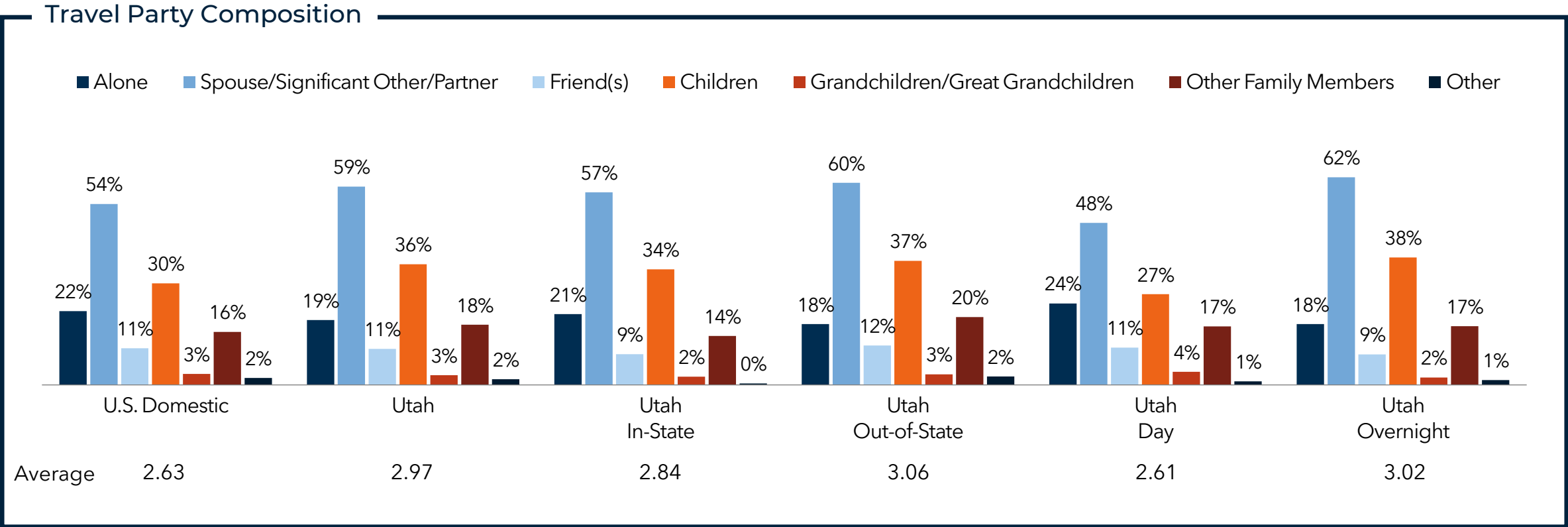
Among Utah visitors, the use of paid accommodations remained at national norms in 2025



Utah overnight visitors use hotels less frequently than U.S. domestic travelers, opting instead to stay in RVs and tents at a greater rate

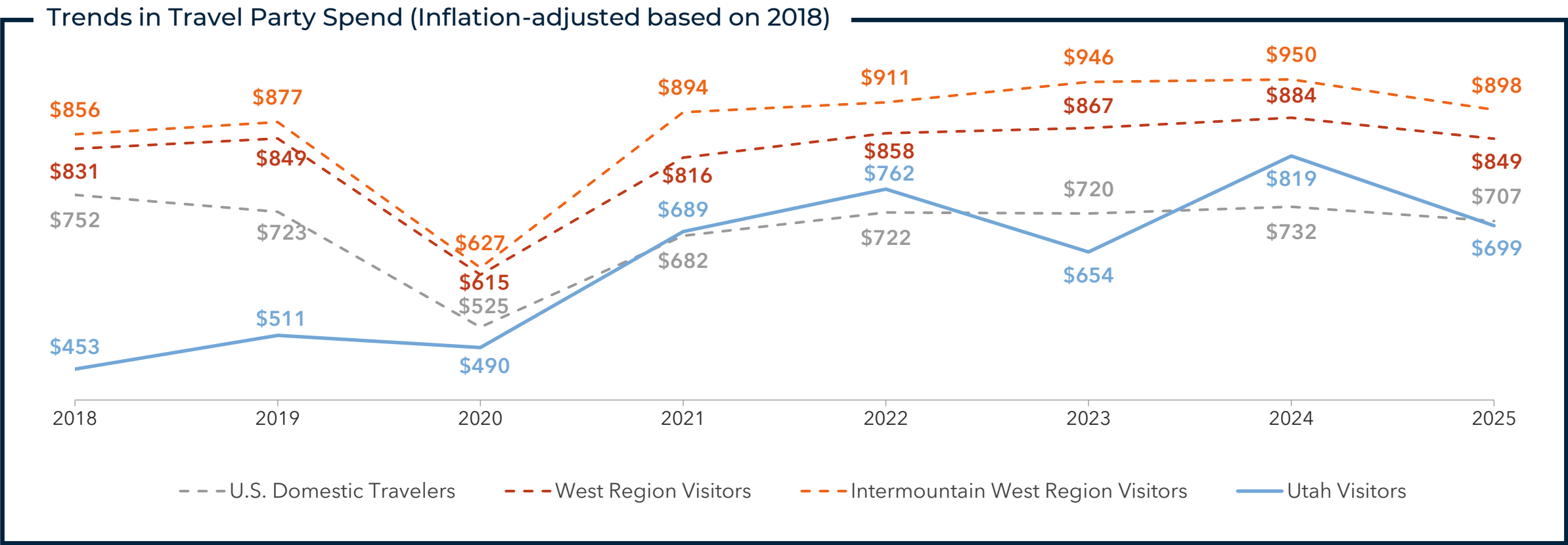


Average travel party size for Utah continues to outpace the national average, driven in part by the increased likelihood of Utah visitors to be traveling with spouses and/or children

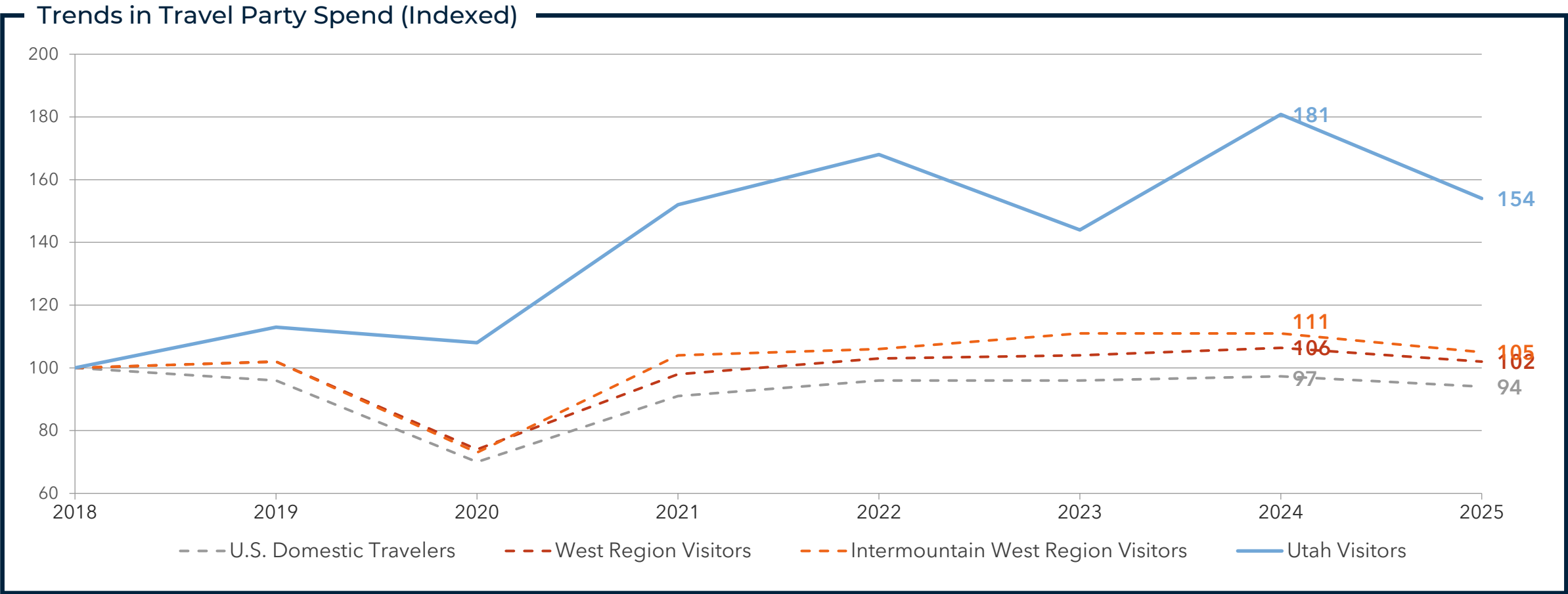


Note: Travel party composition is not mutually exclusive.

Adjusted for inflation 2025 travel spend decreased across the board, falling closer to 2021 and 2022 levels

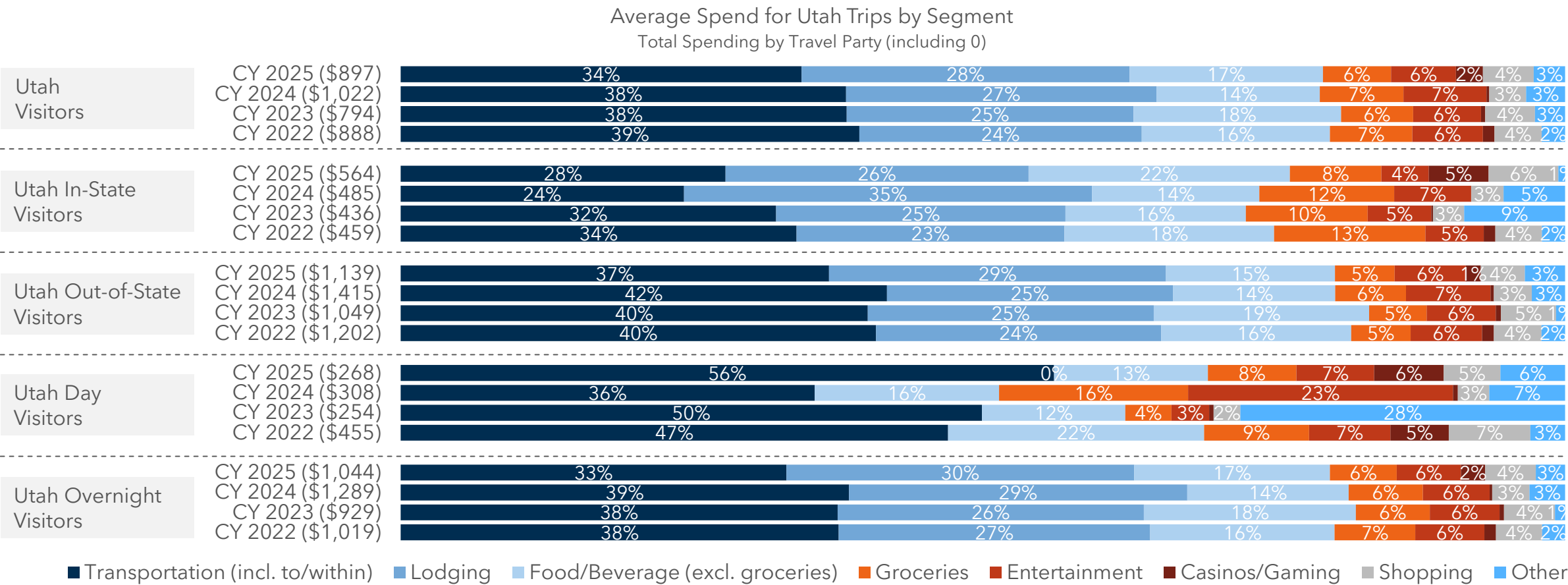


Since 2018, accounting for inflation, Utah's travel party spend has increased by 54%, which outpaces domestic and regional levels and indicates a shift to attracting high spend visitor



Note: Index is based on inflation-adjusted spend to 2018.

2025 spending decreases occurred across all segments for Utah visitors, except for in-state travelers who spent \$79 more on average



Note: Transportation includes transportation to/within the state

Despite reduced spending, Utah's out-of-state leisure visitors continue to be the state's highest spending travel parties

Average Spend for Utah Trips by Segment
Total Spending by Travel Party (including 0)

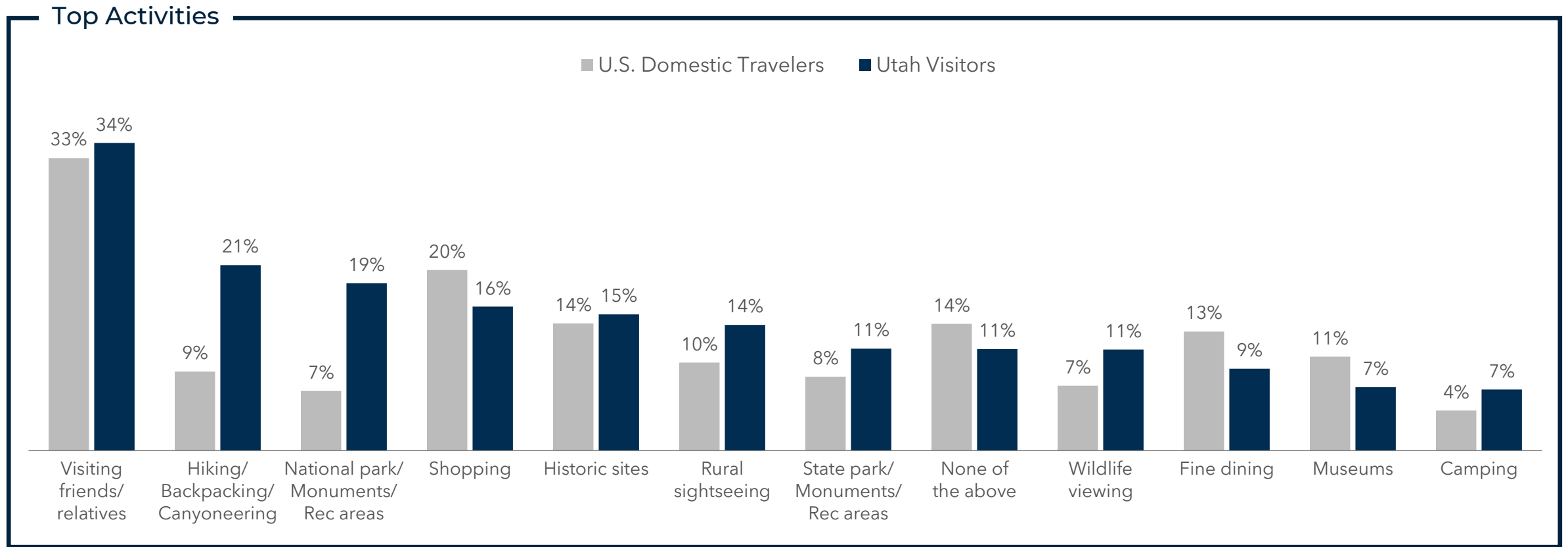


■ Transportation (incl. to/within) ■ Lodging ■ Food/Beverage (excl. groceries) ■ Groceries ■ Entertainment ■ Casinos/Gaming ■ Shopping ■ Other

Note: Transportation includes transportation to/within the state

*Sample size <50

Utah visitors' participation rates in outdoor activities, such as National/ State parks, hiking, and rural sightseeing outpace national norms



Outdoor activities remain the top activities for Utah visitors, especially among overnight visitors

Utah In-State Top Activities	Utah Out-of-State Top Activities	Utah Day Top Activities	Utah Overnight Top Activities
1 Visiting friends/relatives 42%	1 Visiting friends/relatives 29%	1 Visiting friends/relatives 31%	1 Visiting friends/relatives 35%
2 Shopping 14%	2 National park/ Monuments/Rec areas 26%	2 None of the above 22%	2 Hiking/Backpacking/ Canyoneering 24%
3 Hiking/Backpacking/ Canyoneering 14%	3 Hiking/Backpacking/ Canyoneering 26%	3 Shopping 11%	3 National park/ Monuments/Rec areas 23%
4 Historic sites 10%	4 Historic sites 19%	4 Other 10%	4 Historic sites 18%
5 Rural sightseeing 10%	5 Shopping 17%	5 Wildlife viewing 10%	5 Shopping 17%
6 National park/ Monuments/Rec areas 8%	6 Rural sightseeing 17%	6 Rural sightseeing 7%	6 Rural sightseeing 16%
7 Wildlife viewing 8%	7 State park/ Monuments/Rec areas 15%	7 Hiking/Backpacking/ Canyoneering 6%	7 State park/ Monuments/Rec areas 14%
8 None of the above 13%	8 Wildlife viewing 14%	8 Casino/Gaming 6%	8 Wildlife viewing 12%
9 Fine dining 8%	9 None of the above 10%	9 Other nature (photography, etc.) 6%	9 Fine dining 10%
10 Camping 8%	10 Fine dining 10%	10 Historic sites 5%	10 None of the above 9%

Most destinations in Utah saw roughly the same proportion of visitors that they did in 2024, but there were some notable changes. Ogden saw a 3-point increase, and St. George, Davis County, and Garden City all saw a 2-point increase compared to the previous year.

	Utah Visitors			Utah In-State Visitors			Utah Out-of-State Visitors		
	CY 2023	CY 2024	CY 2025	CY 2023	CY 2024	CY 2025	CY 2023	CY 2024	CY 2025
Utah Destinations Visited									
Salt Lake City	33%	32%	30%	18%	18%	19%	43%	43%	37%
St. George	15%	13%	15%	22%	16%	15%	10%	10%	16%
Park City	10%	11%	9%	3%	4%	7%	15%	17%	11%
Provo/Orem	14%	11%	10%	13%	9%	11%	14%	13%	10%
Moab	12%	9%	10%	6%	2%	5%	17%	13%	13%
Zion/Springdale	10%	8%	8%	4%	3%	3%	15%	11%	12%
Bryce Canyon	9%	8%	7%	2%	2%	0%	13%	12%	11%
Ogden	5%	6%	9%	3%	7%	8%	5%	6%	10%
Cedar City	7%	6%	3%	6%	7%	2%	7%	5%	4%
Logan	5%	5%	6%	5%	6%	8%	5%	5%	5%
Brigham City	2%	4%	3%	0%	7%	3%	4%	2%	2%
Monument Valley/Monticello/Bluff/Mexican Hat	4%	3%	2%	1%	1%	1%	6%	5%	3%
Kanab	4%	3%	3%	1%	0%	1%	6%	5%	5%
Torrey/Capitol Reef	4%	2%	2%	2%	1%	1%	5%	4%	2%
Davis County/Lagoon	3%	2%	4%	3%	4%	7%	4%	1%	1%
Vernal	2%	2%	1%	1%	3%	2%	3%	1%	1%
Escalante/Boulder	3%	1%	1%	1%	1%	0%	4%	1%	1%
Garden City/Bear Lake	3%	1%	3%	2%	0%	2%	3%	1%	4%
Dutch John/Flaming Gorge	1%	<1%	1%	0%	0%	0%	2%	1%	2%
Price	—	—	2%	—	—	2%	—	—	2%
Other	18%	18%	15%	27%	29%	21%	11%	9%	11%

Niche Vacation Motivations



Characteristics differ across leisure travelers driven by niche activities to visit Utah

- **Adventure Seekers:** 18% of leisure trips, highest income & spend
- **Parks:** 17% of leisure trips, older, longest stays, highest portion visiting from farther away
- **Outdoor Recreationalists:** 15% of leisure trips, youngest, highest portion of neighboring state residents
- **Nature & Rural Explorers:** 10% of leisure trips, most day trips
- **Arts & Culture:** 14% of leisure trips, lower tendency to stay overnight than most other niches
- **Entertainment:** 17% of leisure trips, three-quarters come from Utah/neighbor state, lower income than most other niches
- **Family & Friends:** 39% of leisure trips, highest % of leisure trips but lowest spend,

	Leisure Visitors	Arts & Culture	State/National Parks (Net)	State Parks*	National Parks	Adventure Seekers	Outdoor Recreationalist	Nature & Rural Explorers	Entertainment	Family & Friends
% of Leisure Trips	100%	14%	17%	5%	15%	18%	15%	10%	17%	39%
Demographics										
Average Age	46.6	42.6	48.3	52.6	48.7	42.7	41.7	45.2	43.2	48.3
Approx. Avg. Household Income	\$103,972	\$102,739	\$111,570	\$105,097	\$117,233	\$120,989	\$95,534	\$100,138	\$96,314	\$99,487
Children <18 in Household	41%	42%	35%	23%	36%	37%	46%	41%	45%	37%
Residence										
Utah Resident	43%	31%	23%	38%	21%	25%	45%	33%	43%	51%
Neighbor State Resident	23%	24%	20%	15%	23%	19%	30%	29%	23%	21%
Trip Characteristics										
Overnight Stay	83%	81%	98%	100%	98%	95%	89%	80%	84%	84%
Average Nights (excl. 0)	4.6	4.3	6.5	8.0	6.0	5.3	3.4	3.7	4.0	4.3
Average Travel Party Size	3.0	3.6	2.9	2.6	2.8	3.5	3.8	3.4	2.7	2.8
Family Travel Party	33%	31%	26%	11%	29%	32%	43%	31%	30%	27%
Average Spend (per trip/party)	\$923	\$1,108	\$1,187	\$1,216	\$1,201	\$1,393	\$1,064	\$1,054	\$1,043	\$822

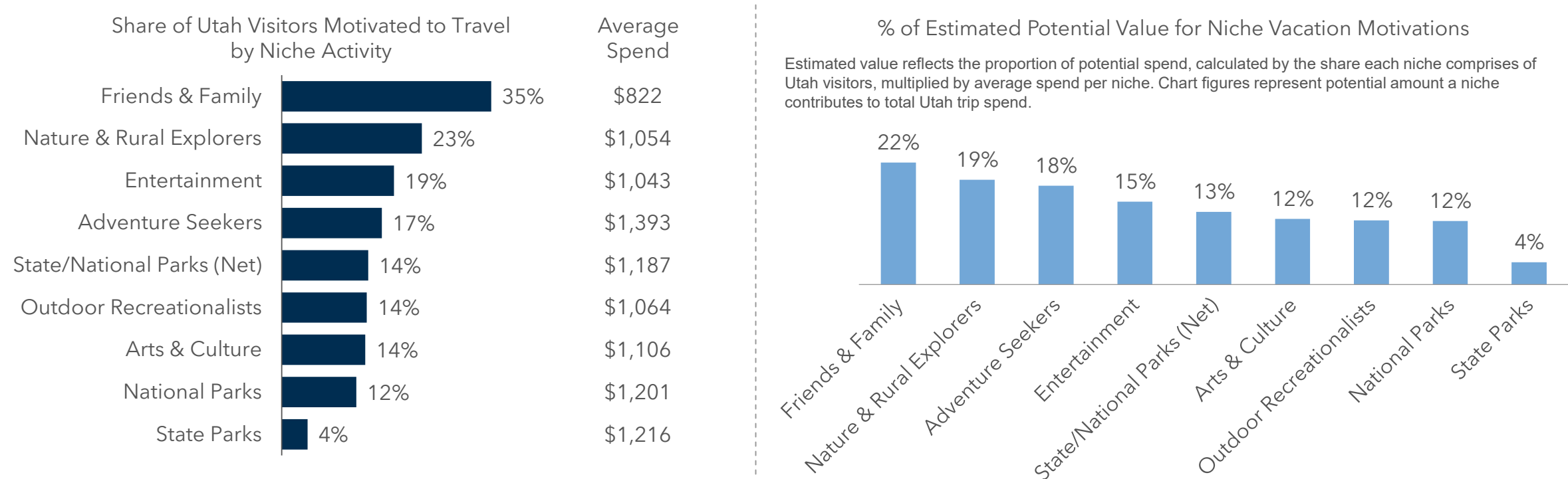
Note: Since it's possible for an activity as a primary or secondary reason for visiting to fall in different niche activity groups (see glossary for niche category definitions), some overlap will exist.

*Sample <30

Travelers motivated to visit Utah for niche activities provide value and contribute to total spending in the state

The most lucrative niche activity segments:

- The Friends & Family niche segment offers the highest estimated potential value due to the share of visitors within that segment. The Nature & Rural Explorers segment had the second highest visitor share as well as an average spend over \$1,000 which helped it land second place in terms of potential value.

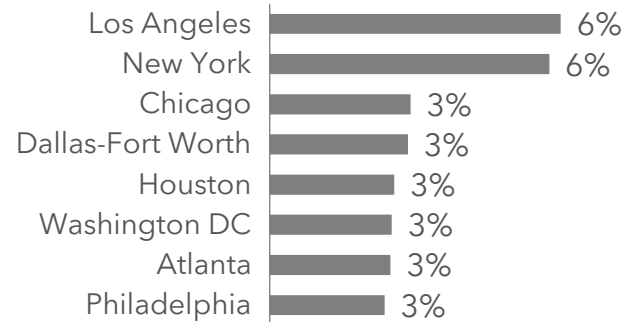


Note: Niche activity figures reflect Utah visitors who said an activity within the niche category was a primary/secondary reason for visit (see glossary for niche category definitions); since it's possible for an activity as a primary reason or secondary reason for visit to fall in different niches, some overlap will exist.

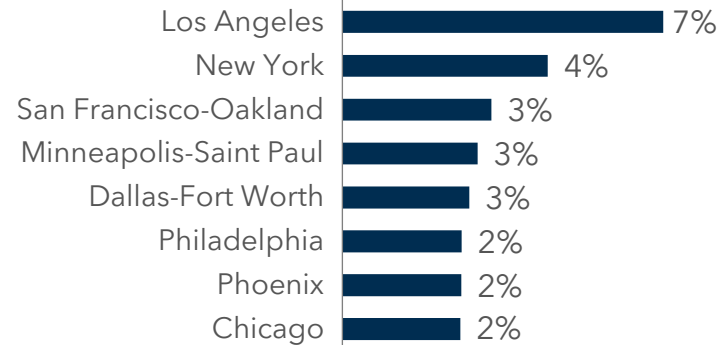
In order to build on their strong potential value, Utah could target Nature & Rural Explorers in markets like Los Angeles, New York, and Minneapolis

Top Markets for Targeting U.S. Niche Travelers

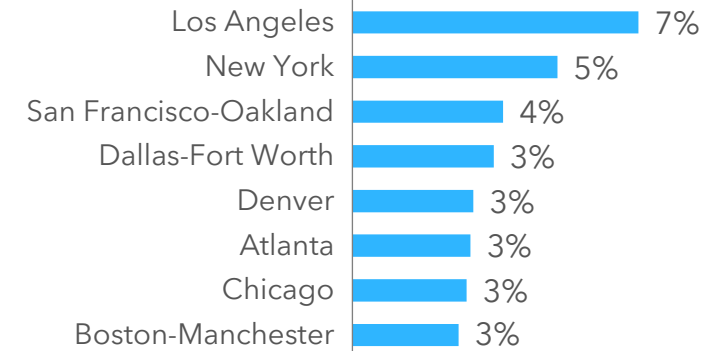
Top DMAs for Arts & Culture Travelers



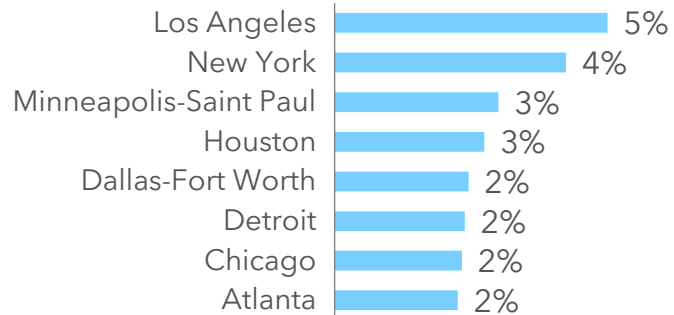
Top DMAs for State/National Parks Travelers



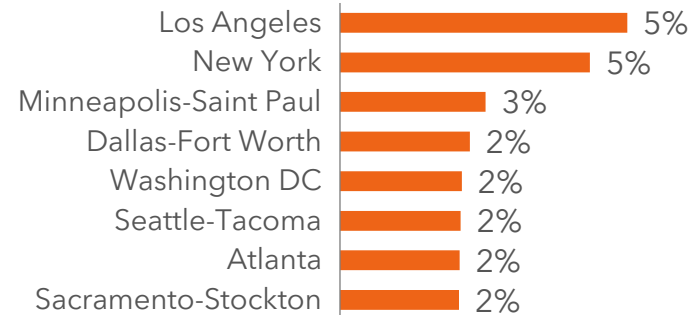
Top DMAs for Adventure Seekers



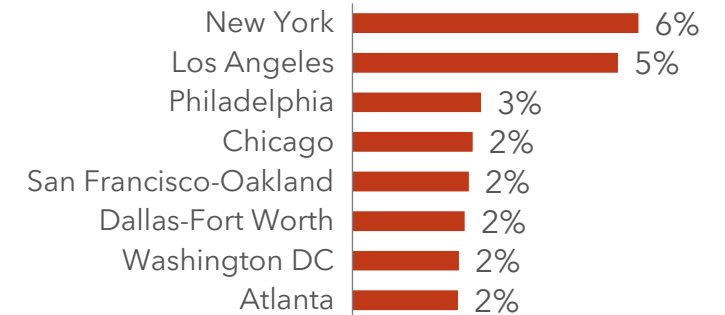
Top DMAs for Outdoor Recreationalists



Top DMAs for Nature & Rural Explorers



Top DMAs for Entertainment Travelers

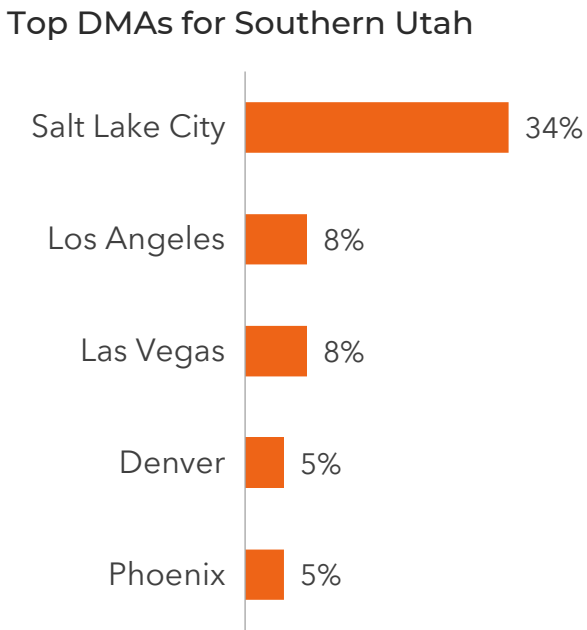
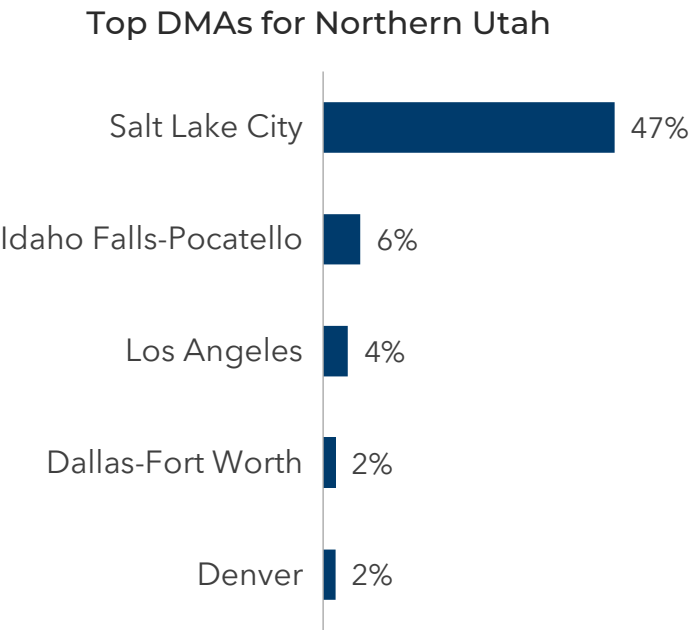


Note: San Francisco-Oakland-San Jose shortened to San Francisco-Oakland. Sacramento-Stockton-Modesto shortened to Sacramento-Stockton.

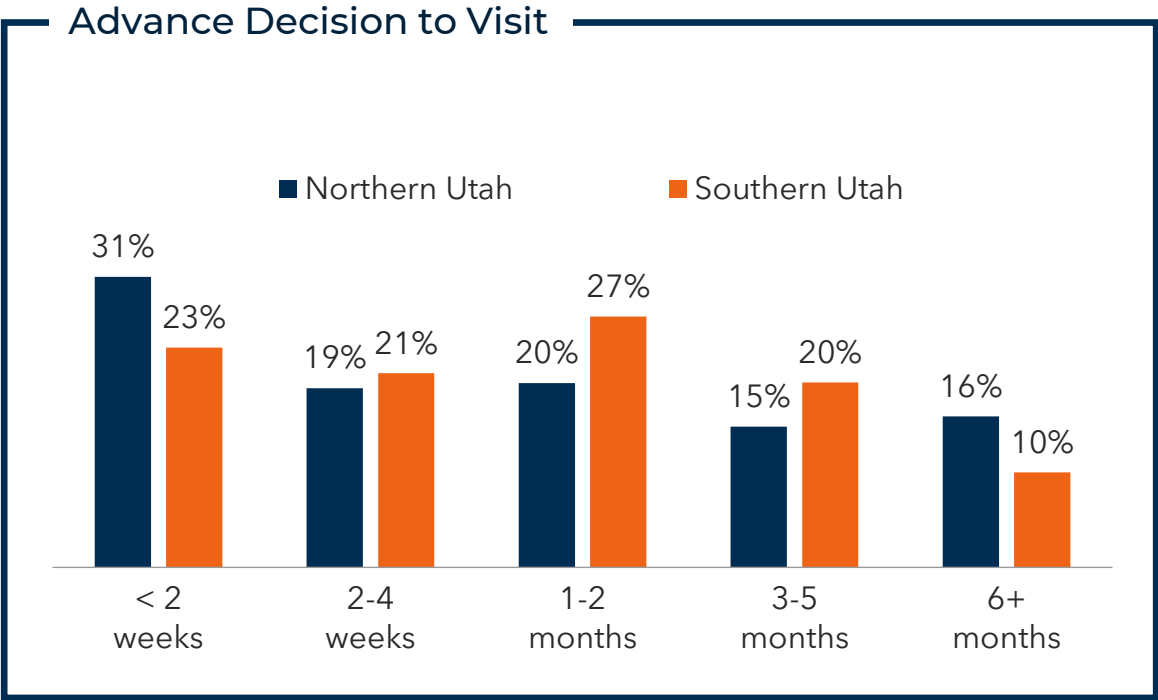
Utah Regional Snapshots

Northern Utah draws visitors from across the country, while Southern Utah visitors primarily come from the Southwest, with Salt Lake City as the notable exception.

Origin Markets

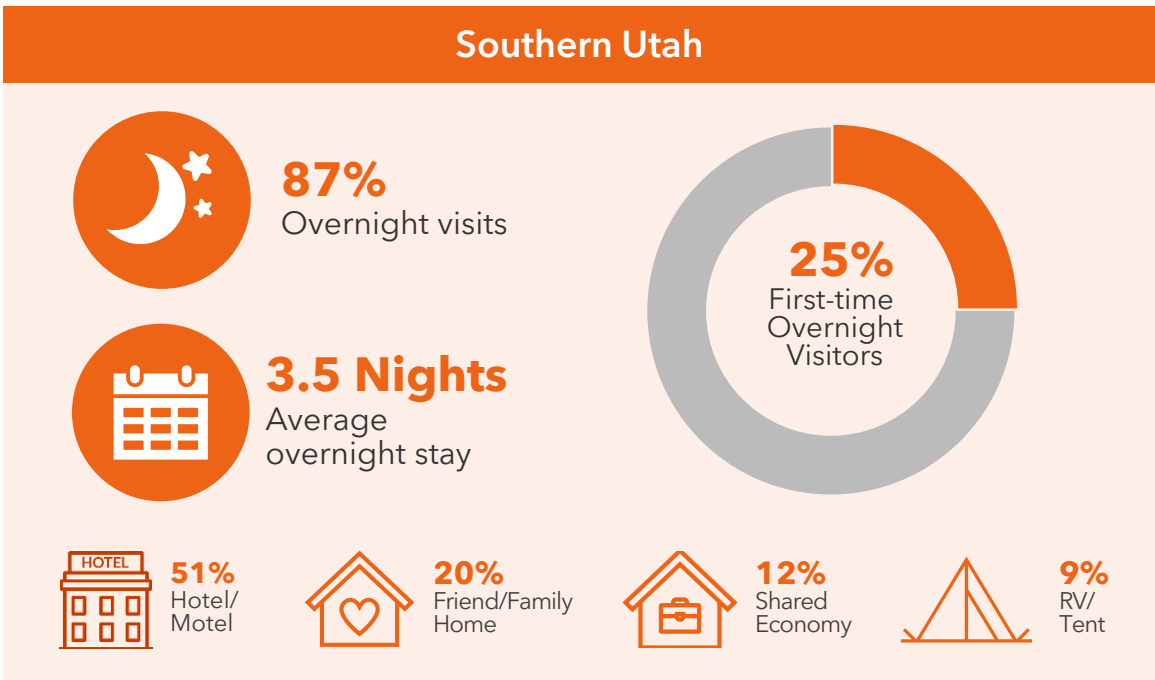
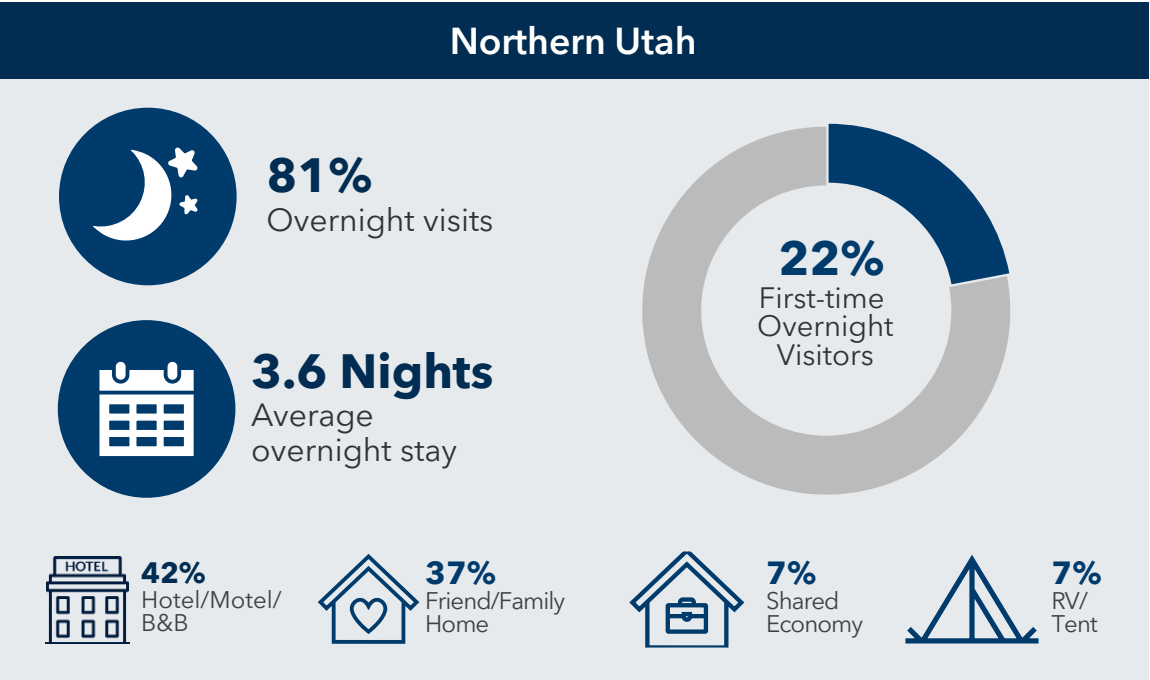


Northern Utah visitors plan more spontaneously, with 31% deciding to visit within two weeks of their trip. Southern Utah visitors plan further ahead, most commonly 1-2 months in advance (27%), likely reflecting their focus on outdoor activities and favorable weather.

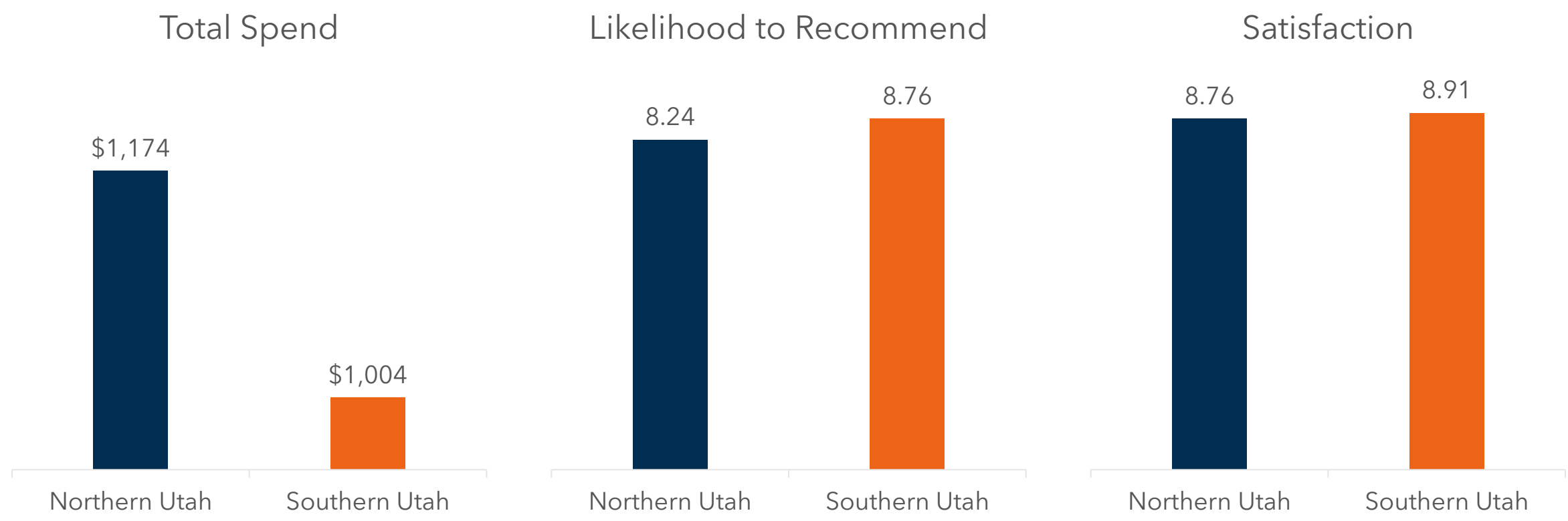


Visitors spend a similar number of nights, on average in Northern and Southern Utah (3.5 vs. 3.6), but Southern Utah visitors are more likely to stay overnight (87% vs. 81%) and be first-time visitors (25% vs. 22%).

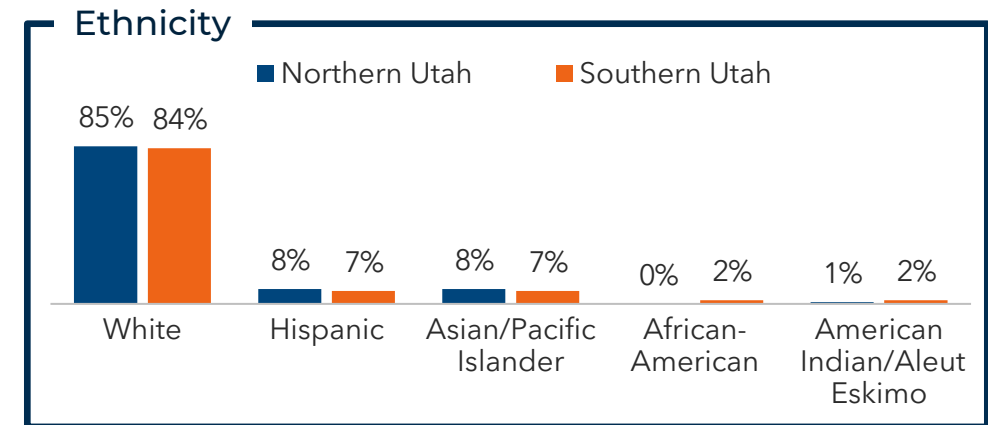
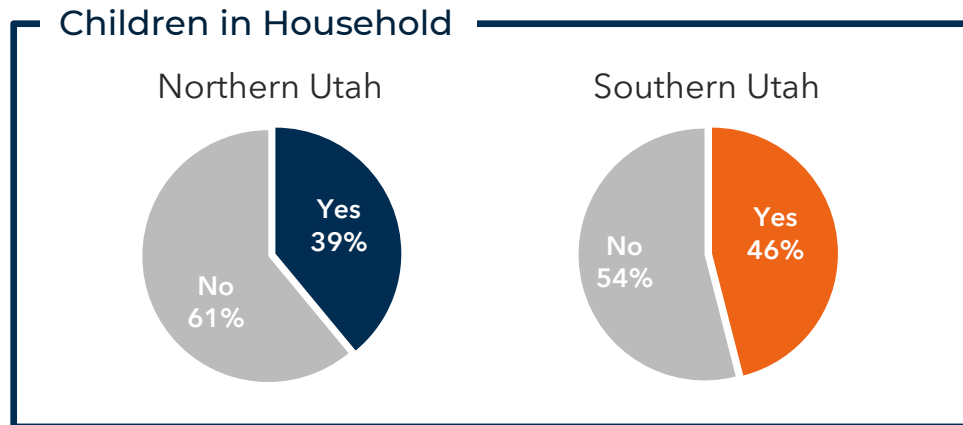
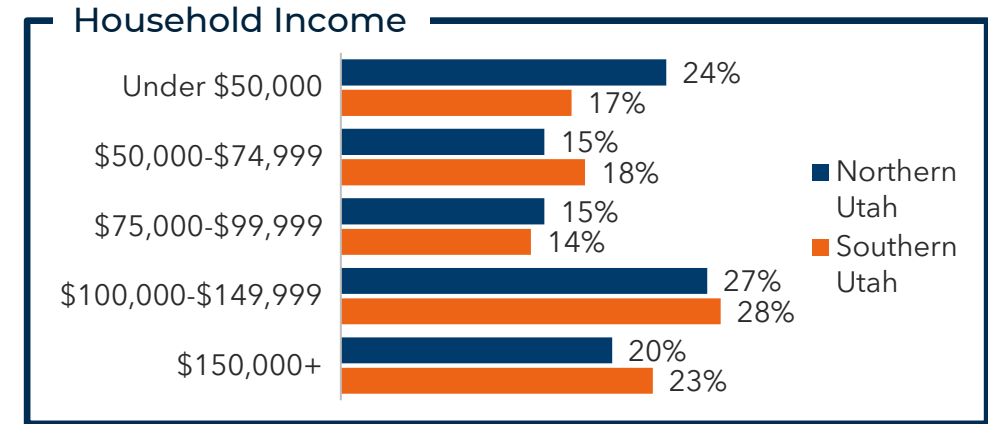
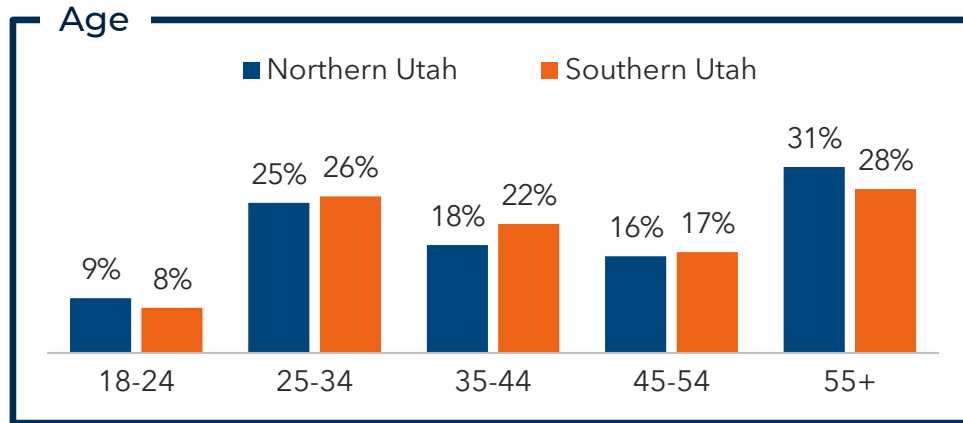
Northern Utah visitors stay with friends/family nearly as often as in hotels (37% vs. 42%). Southern Utah visitors favor hotels (51%) and are slightly more likely to camp or stay in an RV (9% vs. 7%).



Northern Utah visitors, on average spend \$170 more per trip than their Southern Utah counterparts, but Southern Utah visitors are more satisfied with their trip and more likely to recommend Utah to others.



Visitors to Northern and Southern Utah share similar demographics. Minor differences in income and children at home suggest that travel patterns are driven more by motivations and activities than by demographics.

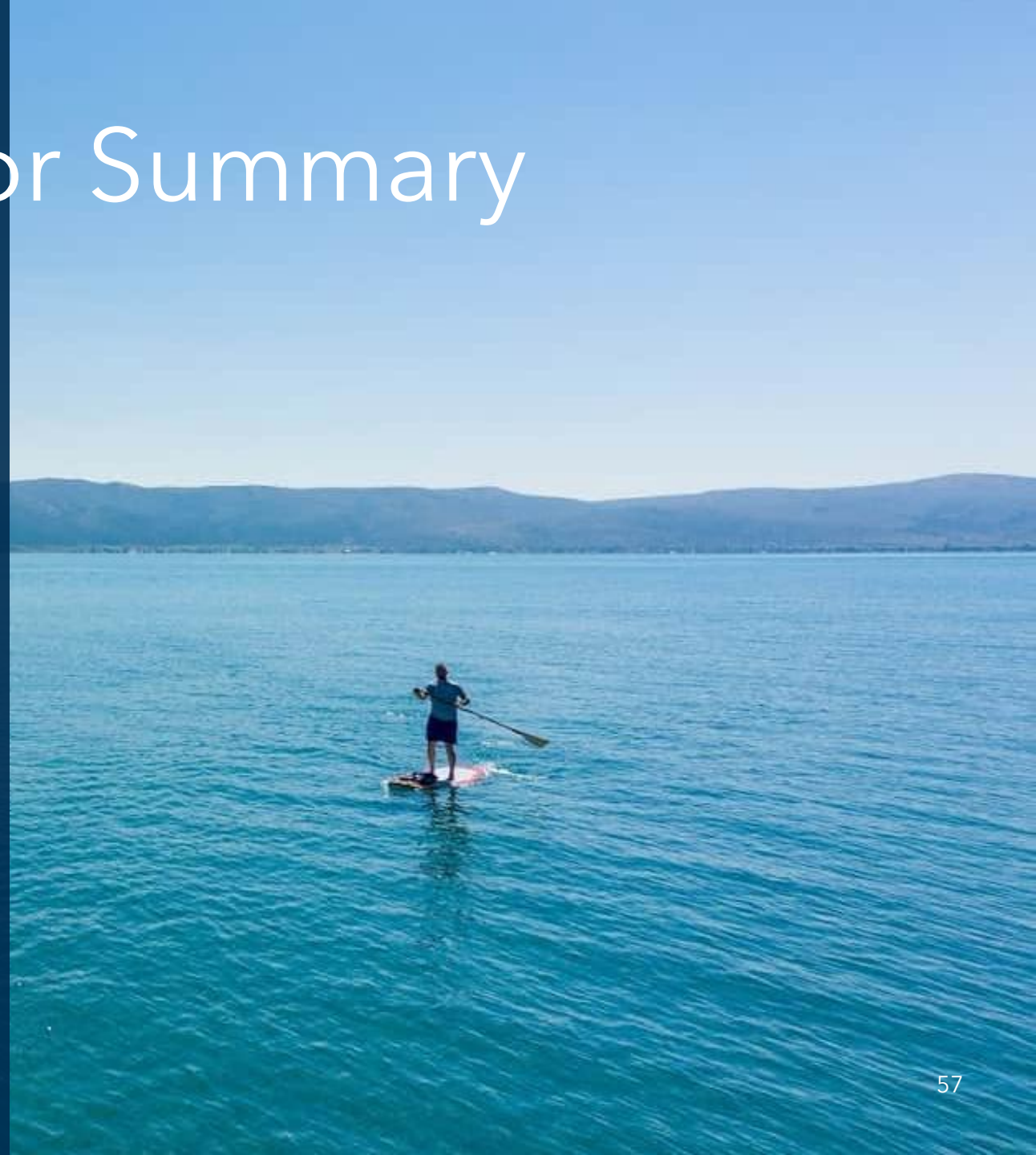


Northern Utah Visitor Summary

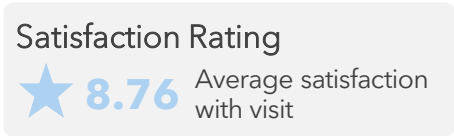
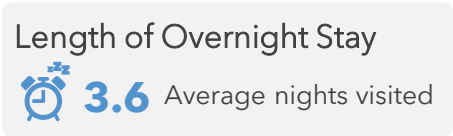
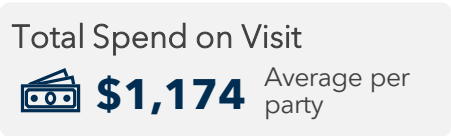
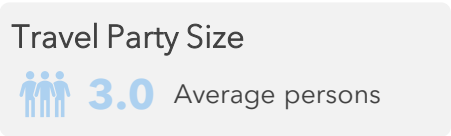
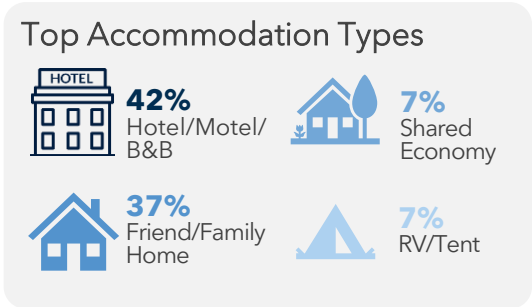
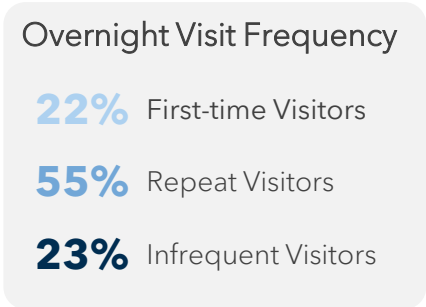
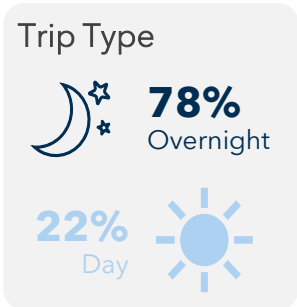
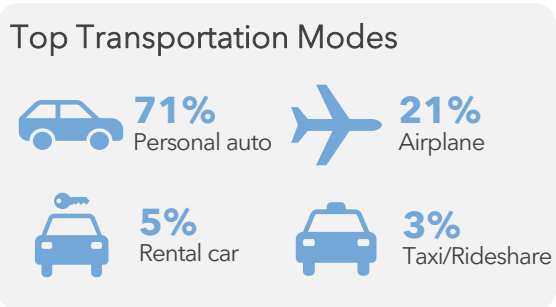
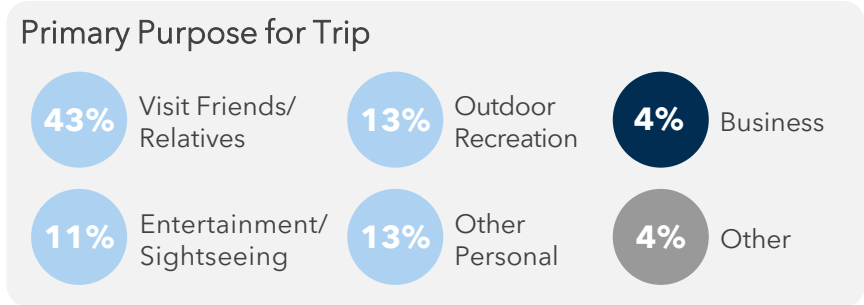
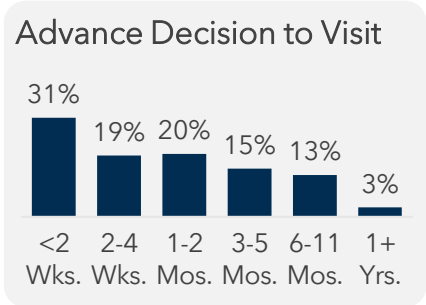
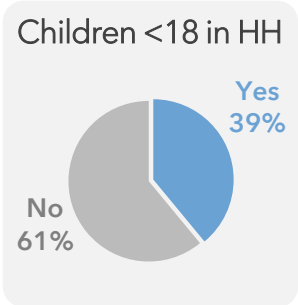
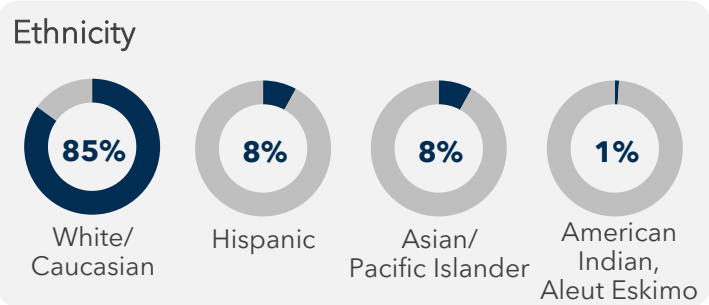
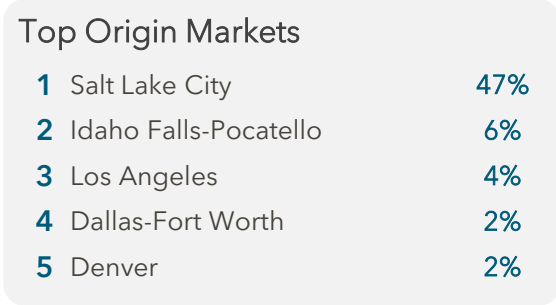
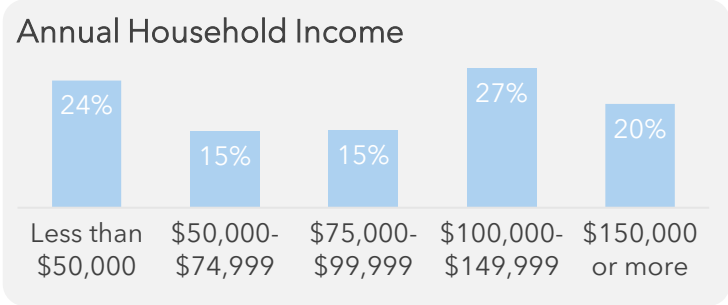
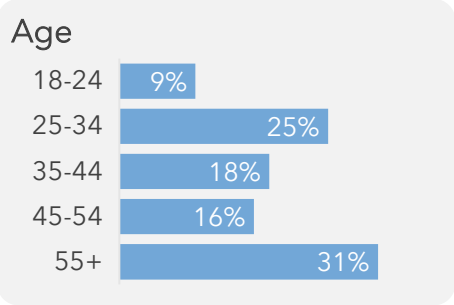
Home to Utah's largest city, Salt Lake City, a higher proportion of visitors to Northern Utah resided in Salt Lake City in 2025 than in the year prior (+3 pts). Meanwhile, a lower proportion of visitors traveled to Salt Lake City (-2 pts), which suggests that visitors wanted to visit other areas in the region.

Visitors to the region come mostly to visit friends/relatives. In 2025, Northern Utah visitors were more likely to stay in a friend/family home (+3 pts) and less likely in a hotel (-5 pts) than in 2024.

Visitors to Northern Utah were less spontaneous than in 2024, as seen by a 4-pt decrease in the two weeks or less advance decision category. While travel party size remained flat and length of stay declined slightly (-0.3 nights), spending increased by \$142 and both satisfaction and likelihood to recommend saw slight increases.



Northern Utah Visitor Snapshot | CY 2025



Sample Size (n) = 340

Southern Utah Visitor Summary

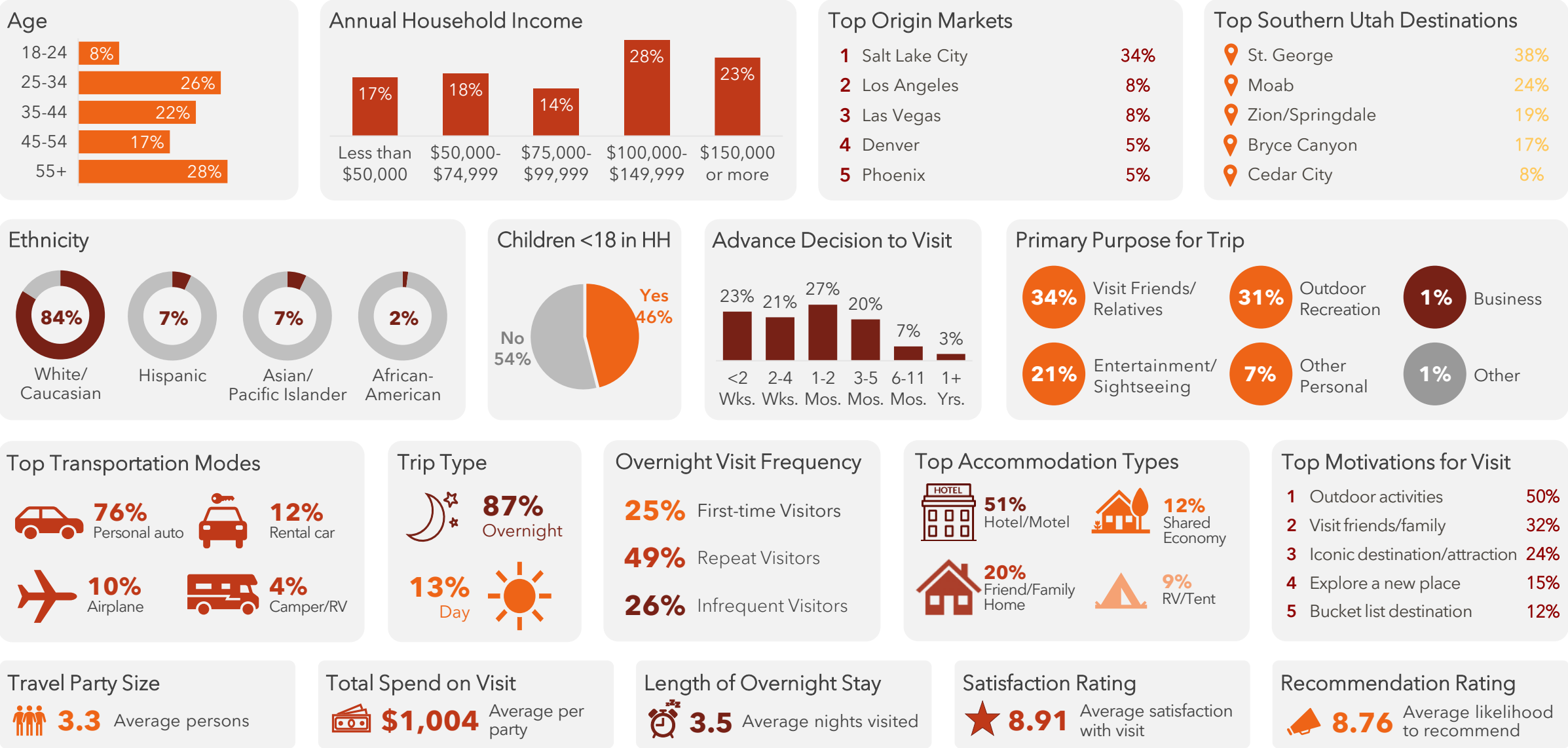
Compared to 2024, the primary trip purposes of visiting friends and family (+1 pt) and outdoor recreation (+4 pts) both saw increases.

Outdoor recreation remained the top travel motivation and increased by 10 pts year-over-year. As a result, more overnight trips to the region occurred (+5 pts) but the proportion of travelers staying in an RV or tent continued to decline (-4 pts). Average trip satisfaction and likelihood to recommend ratings both saw increases compared to last year.

Despite the growth in outdoor recreation interest, travel party size (-0.3) and spend (-\$83) saw slight decreases compared to the prior year.



Southern Utah Visitor Snapshot | CY 2025



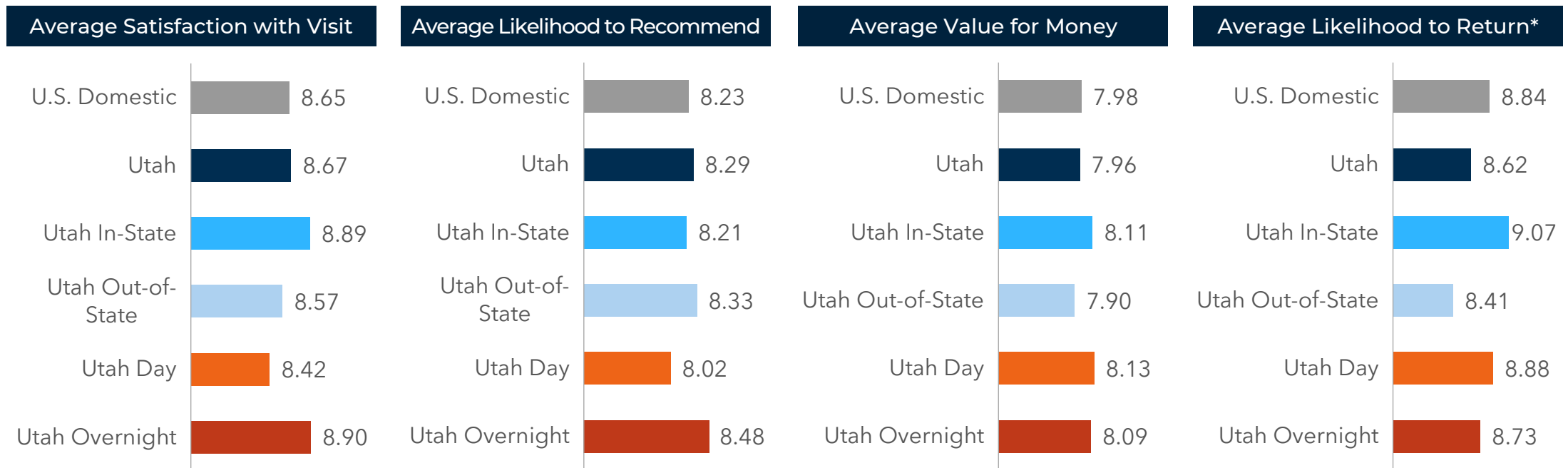
Sample Size (n) = 206

Performance Indicators



Utah outperformed the national average for trip satisfaction and likelihood to recommend, but trailed slightly for value for the money and likelihood to return

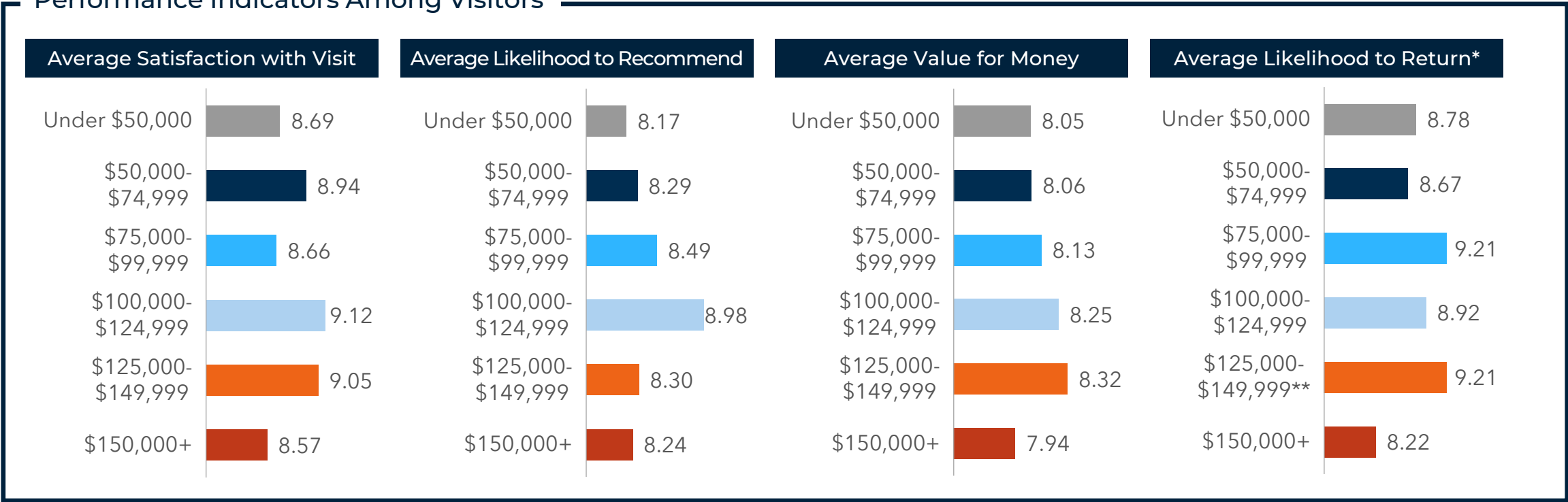
Performance Indicators Among Visitors



*Asked beginning in Q3 of 2025

Utah performed well among high income groups, receiving the highest marks for satisfaction and likelihood to recommend from the \$125k-\$150k income group and the highest marks for value from the \$125-\$150k income group

Performance Indicators Among Visitors



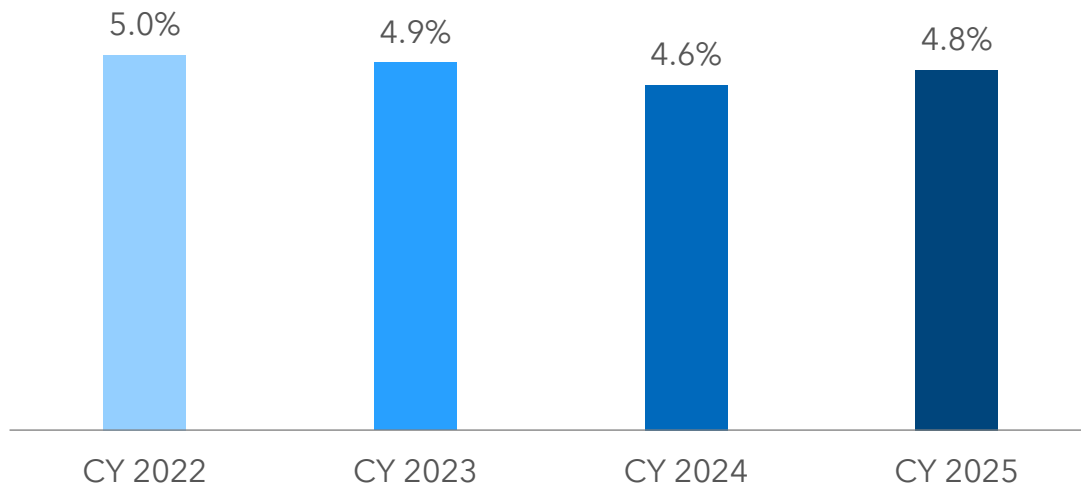
*Asked beginning in Q3 of 2025

**Sample size <30

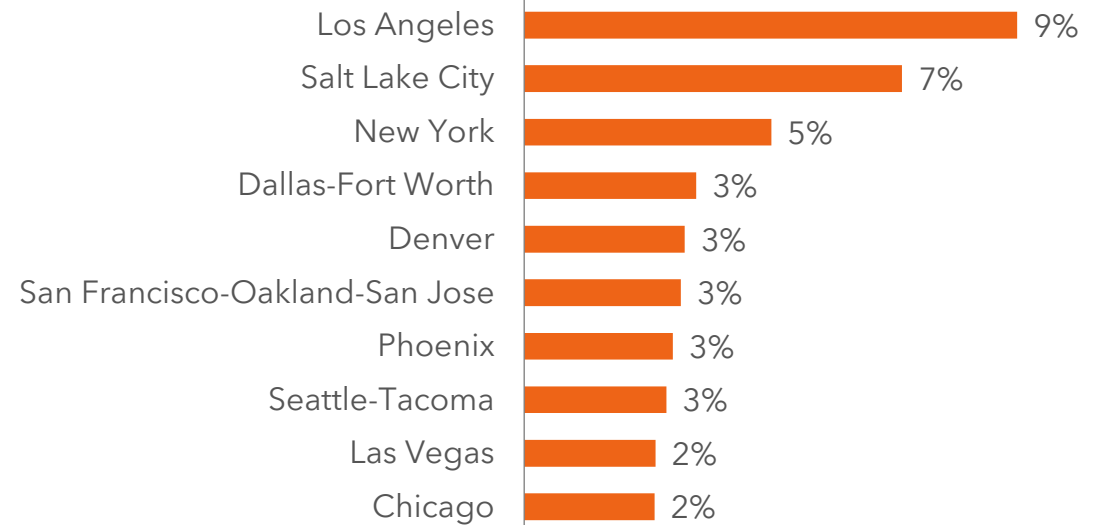
Utah leisure travel intent remains in line with levels seen in previous years and is strongest among travelers residing in large western U.S. DMAs

Leisure Travel Intent

Utah Leisure Travel Intent Next Two Years



Top DMAs for Leisure Intent to Visit Utah in Next Two Years



Visitor Demographics



Utah continues to attract younger, slightly more affluent visitors

	U.S. Domestic Travel	Utah Visitors	Utah Business Visitors*	Utah Leisure Visitors	Utah Leisure In-State Visitors	Utah Leisure Out-of-State Visitors	Utah Leisure Day Visitors	Utah Leisure Overnight Visitors
Age								
18 - 24	8%	8%	22%	6%	7%	6%	8%	7%
25 - 34	23%	25%	50%	24%	24%	24%	25%	23%
35 - 44	17%	19%	14%	20%	16%	23%	19%	21%
45 - 54	18%	16%	11%	16%	17%	16%	20%	16%
55+	35%	31%	2%	33%	36%	32%	29%	33%
Average	46.8	45.5	33.0	46.8	47.7	46.3	46.5	46.5
Income								
Less than \$50,000	23%	22%	21%	19%	21%	18%	27%	17%
\$50,000 - \$74,999	19%	16%	17%	16%	16%	16%	10%	16%
\$75,000 - \$99,999	15%	14%	4%	15%	16%	15%	16%	16%
\$100,000 - \$149,999	23%	26%	16%	29%	34%	25%	31%	28%
\$150,000 or more	20%	21%	43%	21%	14%	25%	16%	22%

*Sample size <50

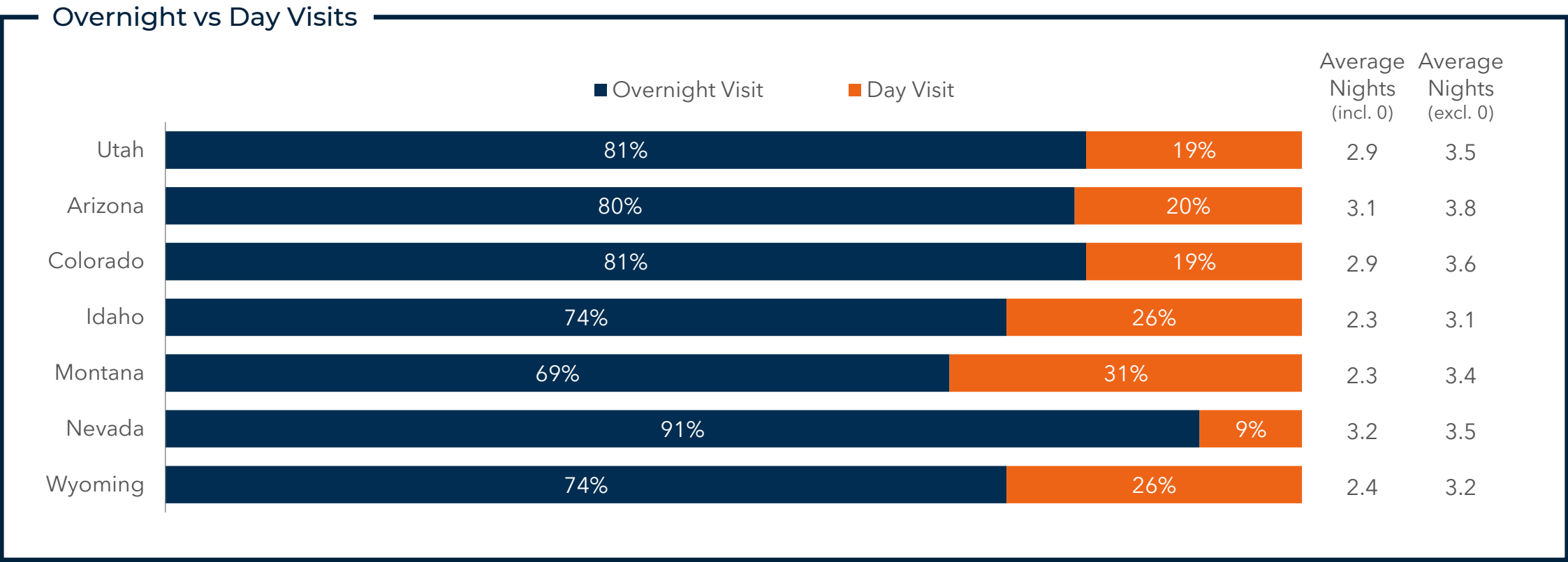
Utah visitors continue to be more likely to be married and have young children than domestic travelers

	U.S. Domestic Travel	Utah Visitors	Utah Business Visitors*	Utah Leisure Visitors	Utah Leisure In-State Visitors	Utah Leisure Out-of-State Visitors	Utah Leisure Day Visitors	Utah Leisure Overnight Visitors
Marital Status								
Now married	56%	59%	26%	62%	59%	65%	57%	62%
Never married	30%	28%	69%	24%	24%	25%	28%	25%
Household Composition								
One Person	40%	37%	66%	34%	39%	31%	41%	32%
Two People	36%	33%	18%	33%	31%	35%	33%	35%
Three People	11%	10%	7%	10%	8%	11%	5%	10%
Four People	9%	14%	6%	16%	16%	16%	15%	16%
Five or More People	3%	6%	3%	7%	7%	8%	5%	7%
Children in Household								
Have Children Under 18	35%	41%	35%	41%	42%	40%	40%	40%
Ethnicity								
White/Caucasian	81%	85%	59%	88%	95%	84%	90%	88%
African-American	8%	1%	9%	1%	0%	1%	0%	1%
Asian/Pacific Islander	6%	7%	23%	6%	3%	8%	5%	6%
Hispanic	10%	9%	14%	8%	3%	11%	8%	8%

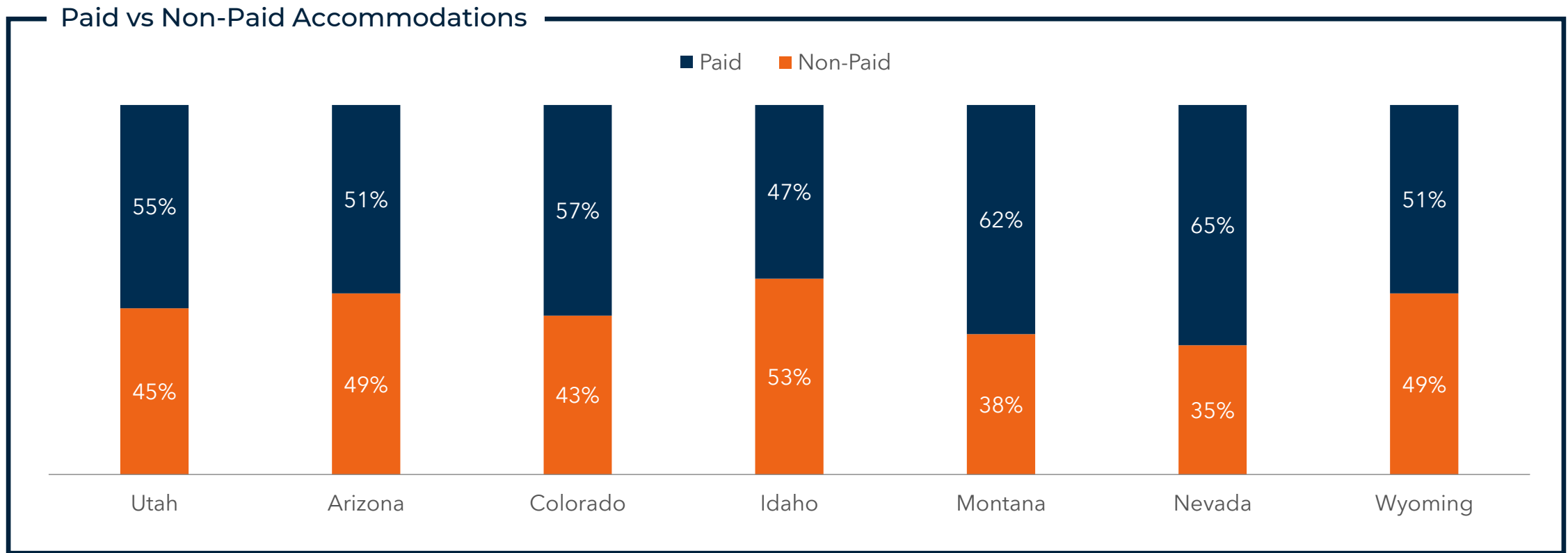
Competitive Environment



Utah's overnight visitors stayed an average of 3.5 nights on their trip, which trailed only Arizona (3.8 nights) and Colorado (3.6 nights)

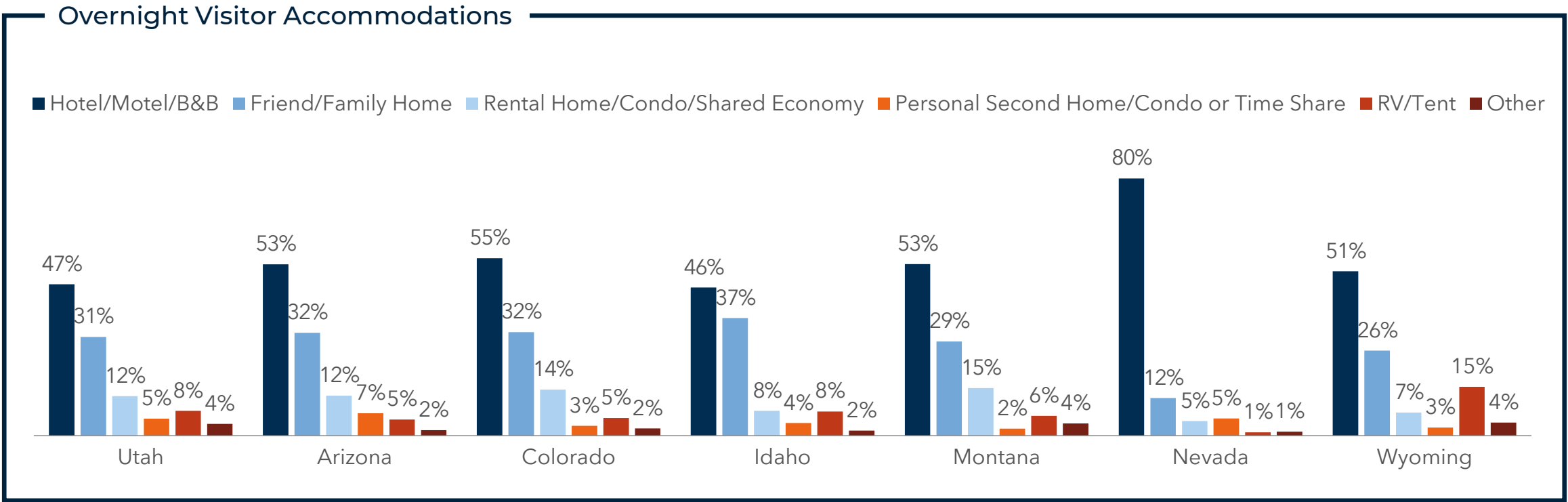


55% of visitors to Utah choose to stay in paid accommodations, putting Utah in the middle of the competitive set

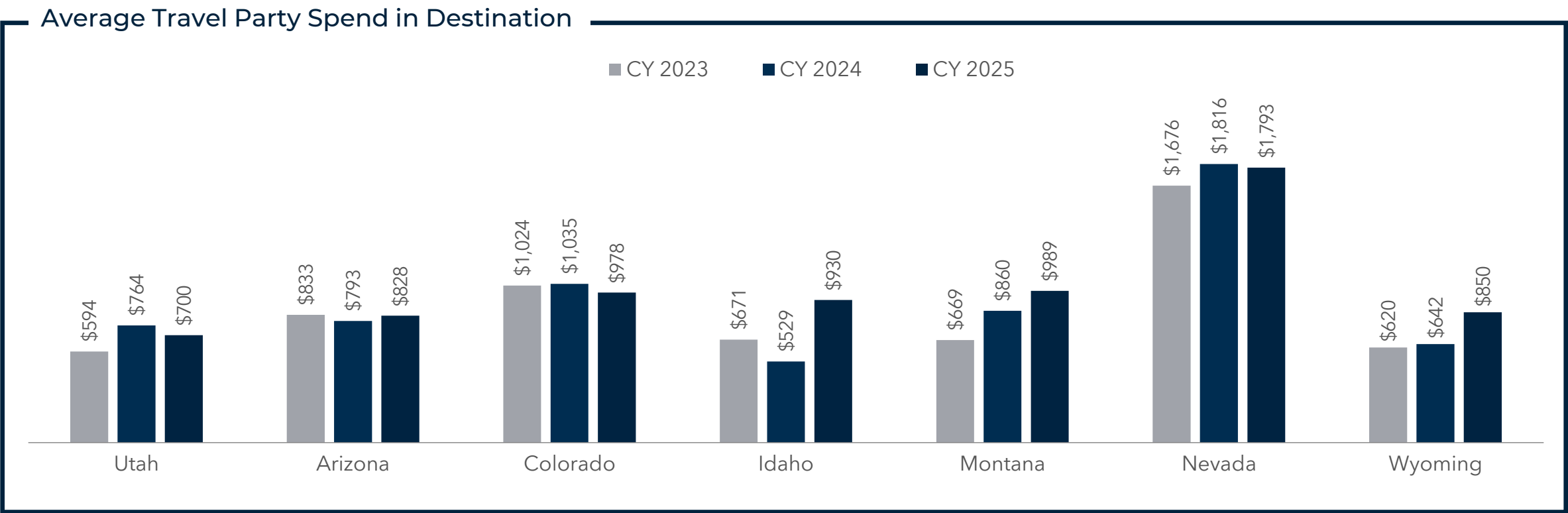


Utah ranks 2nd to last among competitors for proportion of hotel/motel/B&B stays

Utah doesn't dominate in any particular accommodation type; it has a higher proportion of hotel and VFR stays than the more rugged destinations (Montana, Wyoming) and a higher proportion of RV/Tent stays than the more urban destinations (Colorado, Nevada). Overall, the accommodation breakdown demonstrates Utah's ability to appeal to a diverse audiences.

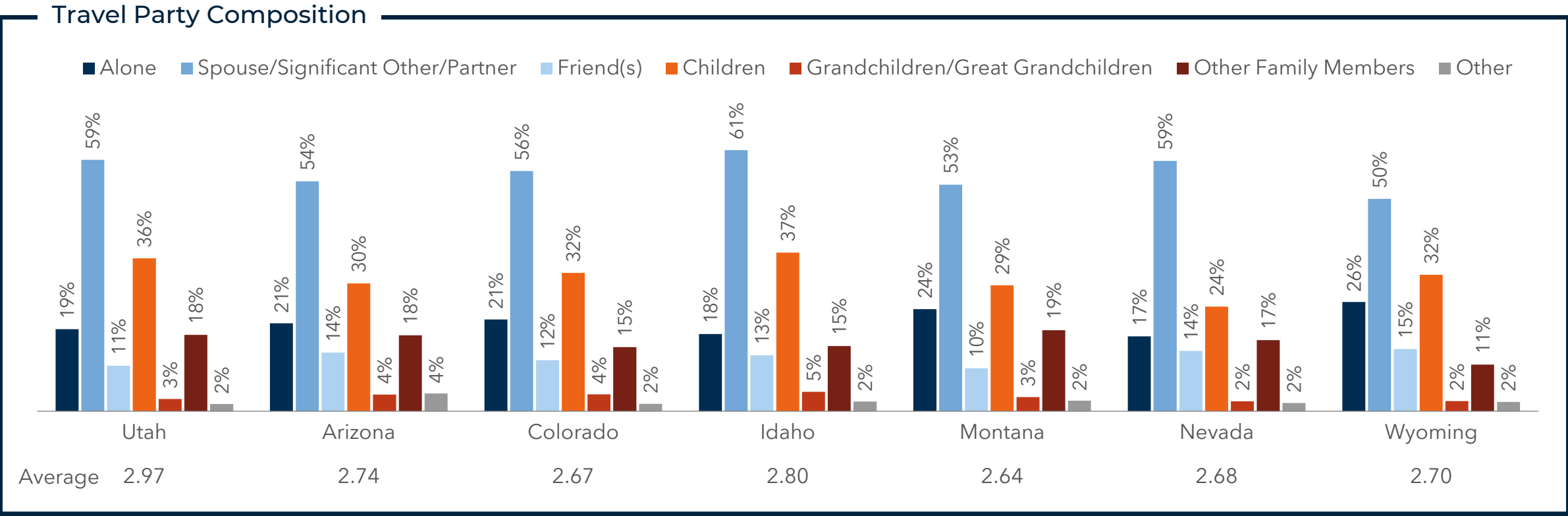


Average travel party spend in Utah decreased by 8% year-over-year, but remains significantly higher than 2023 levels



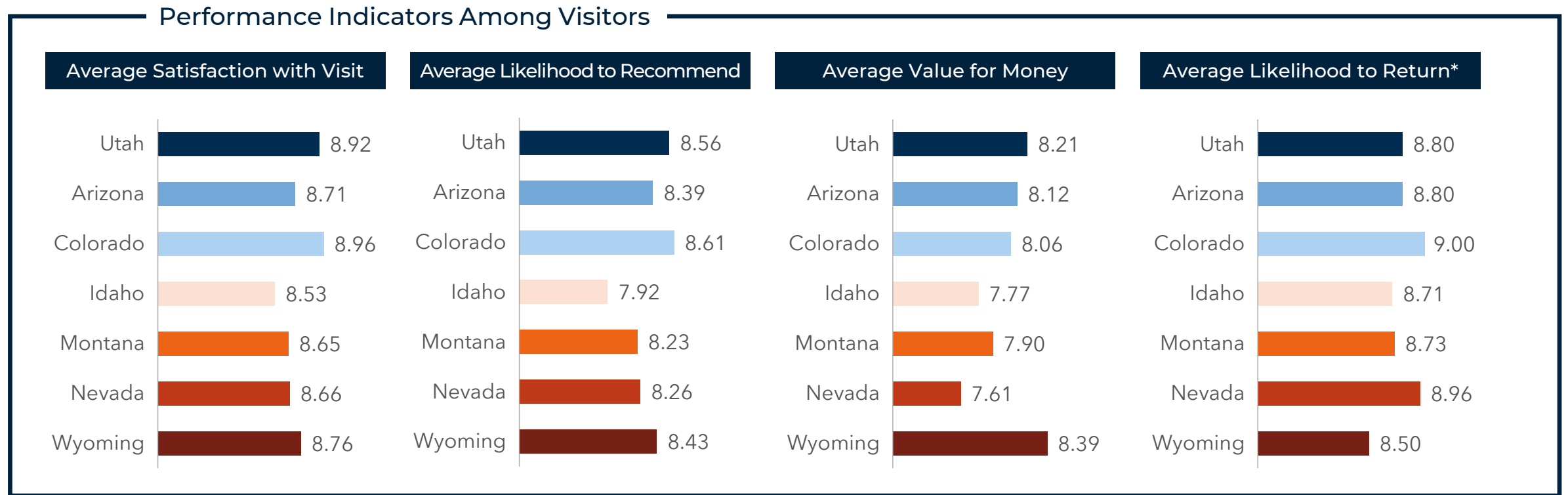
Note: Spend within state excludes amount spent on transportation to get to the state.

Utah and Idaho visitors were most likely to travel with children or other family members, driving higher travel party sizes



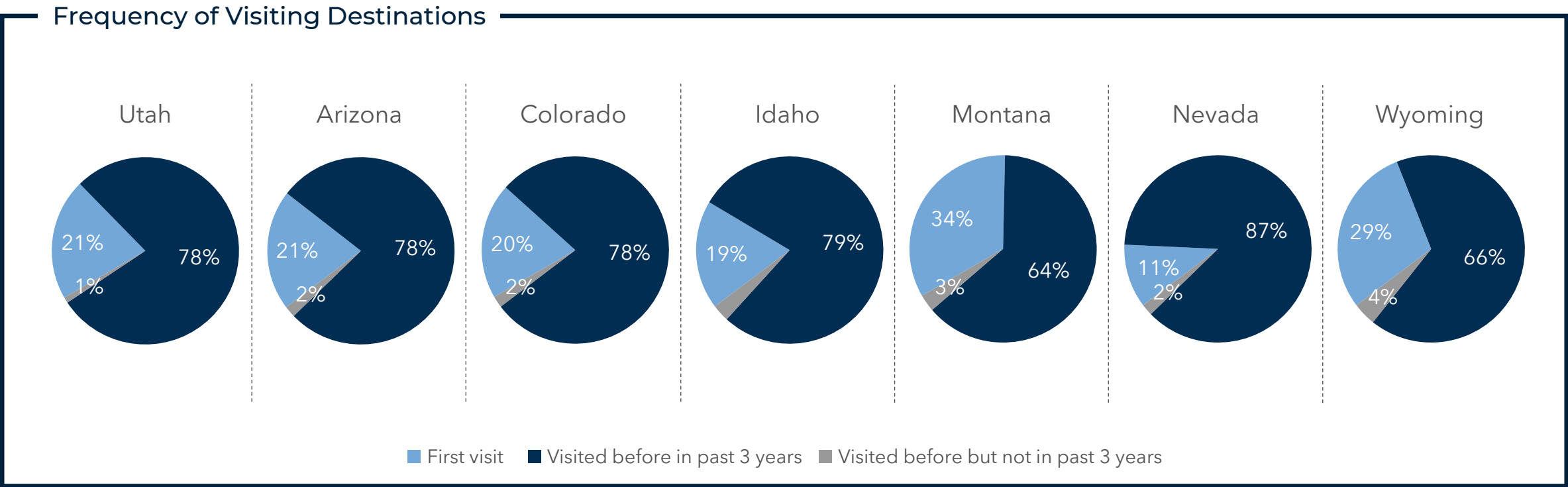
Note: Travel party composition is not mutually exclusive.

Utah ranks 2nd across three performance indicators, trailing only Colorado for satisfaction and likelihood to recommend, and Wyoming for value for the money



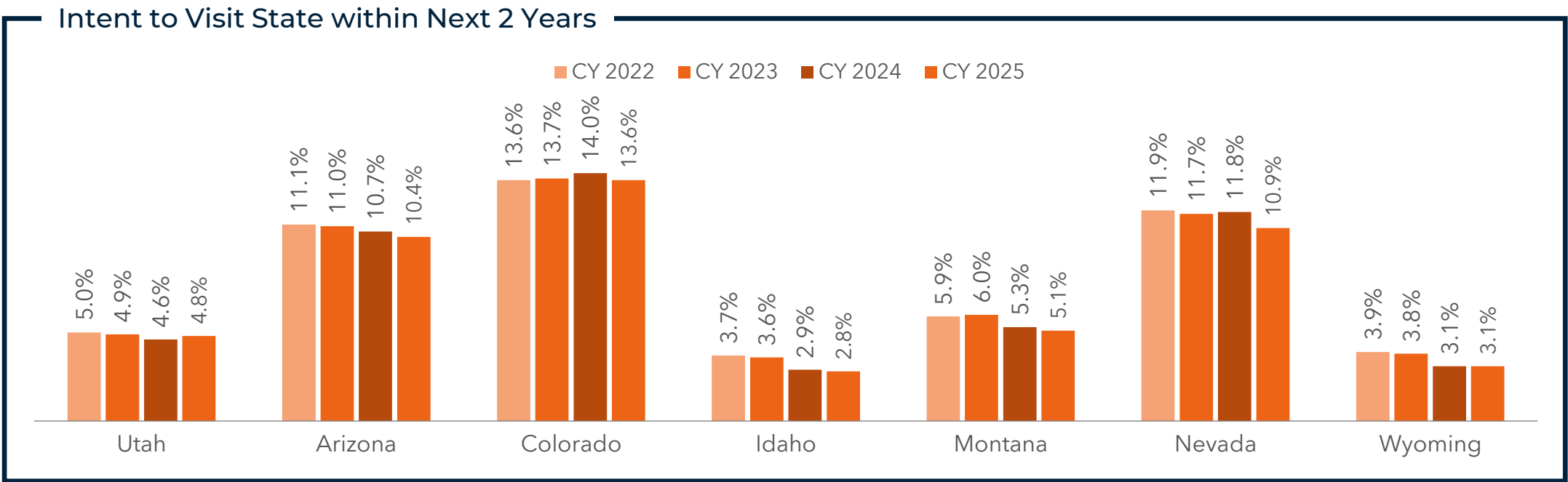
**Asked beginning in Q3 of 2025*
Notes: Ratings for satisfaction, likelihood to recommend, likelihood to return, and value for money filtered to only reflect leisure visitors.

Utah's proportion of first-time visitors ranks 3rd in its competitive set, trailing only Montana and Wyoming



Note: Ratings only reflect leisure, overnight visitors.

Utah's leisure travel intent remains close to 5%, as it has in prior years



Note: Figures based on all respondents qualifying as a traveler for the survey by having traveled in the past year.

47% of Utah visitors were from households with an income of \$100k or greater, trailing Nevada by just one point

	Utah Visitors	Arizona Visitors	Colorado Visitors	Idaho Visitors	Montana Visitors	Nevada Visitors	Wyoming Visitors
Age							
18 - 24	8%	11%	8%	8%	7%	5%	9%
25 - 34	25%	25%	27%	28%	21%	20%	27%
35 - 44	19%	16%	19%	18%	20%	18%	15%
45 - 54	16%	17%	18%	19%	19%	18%	16%
55+	31%	30%	28%	27%	33%	39%	34%
Average	45.5	45.0	44.8	44.2	46.1	48.7	45.3
Income							
Less than \$50,000	22%	25%	22%	28%	30%	19%	34%
\$50,000 - \$74,999	16%	18%	15%	20%	21%	20%	16%
\$75,000 - \$99,999	14%	13%	17%	15%	11%	13%	16%
\$100,000 - \$149,999	26%	24%	24%	17%	19%	25%	20%
\$150,000 or more	21%	20%	22%	20%	18%	23%	14%

Utah visitors were more likely to be married, have young children, and live in a household with at least four people than all competitors

	Utah Visitors	Arizona Visitors	Colorado Visitors	Idaho Visitors	Montana Visitors	Nevada Visitors	Wyoming Visitors
Marital Status							
Now married	59%	52%	55%	56%	58%	56%	54%
Never married	28%	35%	31%	28%	28%	33%	27%
Household Composition							
One Person	37%	40%	39%	36%	47%	39%	43%
Two People	33%	36%	35%	37%	32%	40%	37%
Three People	10%	12%	12%	14%	10%	10%	10%
Four People	14%	9%	9%	7%	10%	8%	9%
Five or More People	6%	3%	4%	6%	2%	3%	2%
Children in Household							
Have Children Under 18	41%	36%	40%	40%	38%	31%	38%
Ethnicity							
White/Caucasian	85%	79%	85%	85%	82%	72%	88%
African-American	1%	7%	5%	5%	4%	9%	2%
Asian/Pacific Islander	7%	6%	6%	4%	4%	14%	5%
Hispanic	9%	19%	12%	6%	4%	15%	8%

A large, layered rock formation with distinct horizontal strata dominates the background. The rock is a warm, reddish-brown color. Several small, dark, circular openings are visible in the upper part of the rock face. In the foreground, a group of people are kayaking on a body of water. One person is in a blue kayak, and another is in a purple kayak. The water is a calm, greenish-brown color. The sky is a clear, pale blue. The overall scene is a peaceful outdoor activity in a natural setting.

Methodology



Omnitrak
UNEARTH AHA! INSIGHTS. MASTER YOUR MARKET.

TravelTrakAmerica Syndicated Research

TravelTrakAmerica is a comprehensive national travel study of U.S. households focusing on domestic travel. The study collects general information on U.S. travelers and detailed information about their trips taken.



Methodology:

Omnitrak sources survey respondents from a single managed panel provider to administer the monthly TravelTrakAmerica survey to a nationally representative sample of U.S. households.

Each month a variety of general information (e.g., demographics, perceptions, travel intent, etc.) is collected from more than 9,000 U.S. travelers. “Travelers” are defined as having taken one or more trip(s) more than 50 miles from home (each-way, excluding commuters) during the past 12 months.

Details about trips taken during the past-month are collected from approximately 4,000 travelers who took at least one trip in the prior month. To ensure the survey captures all destinations visited to the best of its ability, when asked where they went in a state, respondents are provided with an option to type in the destination they visited.

Glossary

Term	Definition
Origin DMA	Designated Market Area: Areas where respondents live that share the same primary TV broadcast signals (210 DMAs in US).
Person-Trip	Total person-trips are all trips taken by all people; i.e., a couple taking three trips counts as six (two people, each taking three trips).
Trip	Travel 50+ miles (one-way) away from home or overnight. Excludes commuters or commercial travel (i.e., flight attendants, commercial vehicle operator).
U.S. Travelers	U.S. residents who have taken at least one "trip" during the past 12 months.
U.S. Domestic Travel	U.S. residents who visited at least one U.S. destination on a "trip".
Utah Visitor	A U.S. traveler who visited Utah during the specified time period.
Niche Vacation Motivation	An activity or group of activities a Utah visitor participated in during their visit, where the niche activity or at least one activity within the niche activity group was a primary or secondary reason for their visit. Niche vacation motivations listed below with activities defining each.
Outdoor Recreationalists	Activities include camping, biking, fishing, horse riding, kayaking/canoeing/paddleboarding, sailing, ATV/4-wheeling, golf, boating, other snow activities
Adventure Seekers	Activities include hang gliding/skydiving/base jumping, hiking/backpacking/canyoneering, mountain biking, mountain climbing, skiing/snowboarding, whitewater rafting, water skiing, windsurfing/kiteboarding
Nature & Rural Explorers	Activities include bird watching, nature travel/eco-touring, wildlife viewing, other nature, farms/agri-tours, rural sightseeing
Arts & Culture	Activities include art galleries, historic sites, Native American ruins, museums, theater, symphony/concert, music festival, local/folk art/craft, TV/movie location
Entertainment	Activities include urban sightseeing, zoos/aquariums, attractions, fine dining, unique local cuisine, gardens, nightclubs/dancing, wine tasting/winery, craft breweries, special event, major professional sports, amateur/collegiate/other sports events (spectator), shopping, spa/health club, motor sports
State/National Parks	Activities include state park/monument/recreation areas, national park/monument/recreation area
Family/Friends	Activities include visiting friends/relatives, family reunion
Visit Frequency	Frequent visitors have visited more than once before in the past 3 years and infrequent have visited before but not in the past 3 years.

TravelTrakAmerica Sample and Margin of Error

The sample size table below indicates unweighted and demographic weighted sample sizes for the corresponding visitor segments in 2024 and 2025.

The margin of error table below indicates how much the results in the report for each visitor segment might differ from the true population proportion. For example, 10% of Utah visitors reported using an airline website to select a destination in 2025. Since the sample size of Utah visitors was 550, then we can say with a 95% level of confidence that the true proportion is between 7.5% and 12.5%.

Sample Size	2024 Unweighted	2024 Demographic Weighted	2025 Unweighted	2025 Demographic Weighted
Total U.S. Travelers Respondents	108,240	112,675	108,240	112,950
Total U.S. Domestic Travelers	42,287	44,844	42,331	44,865
Total Utah Visitors	460	519	496	550
Utah In-State Visitors	185	209	199	219
Utah Out-of-State Visitors	275	310	297	331

Margin of Error	2025 Sample Size	At 5% or 95%	At 10% or 90%	At 20% or 80%	At 30% or 70%	At 50%
Total U.S. Domestic Travelers	44,865	0.2%	0.3%	0.4%	0.4%	0.5%
Total Utah Visitors	550	1.8%	2.5%	3.3%	3.8%	4.2%
Utah In-State Visitors	219	2.9%	4.0%	5.3%	6.1%	6.6%
Utah Out-of-State Visitors	331	2.3%	3.2%	4.3%	4.9%	5.4%