

The State of Utah's Travel and Tourism Industry 2017

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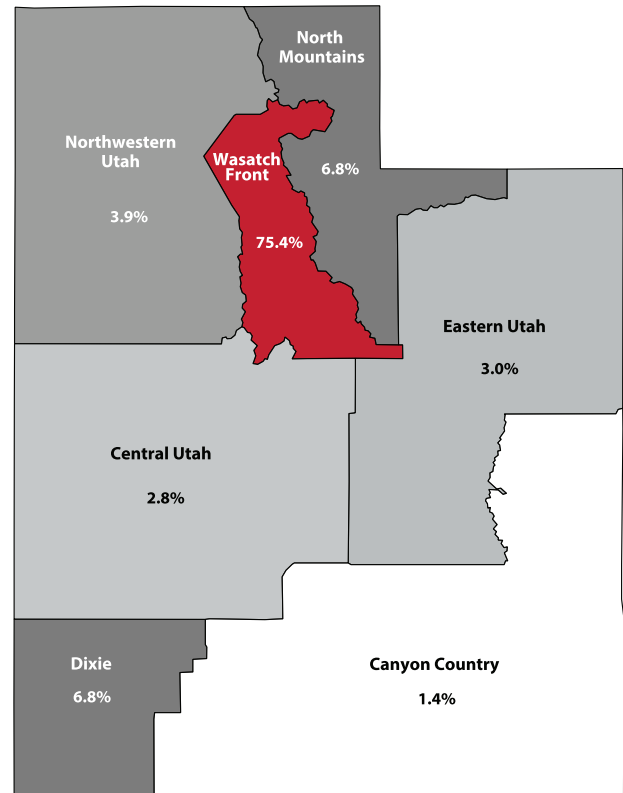
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Introduction

Utah’s diverse travel and tourism industry generates jobs and income for Utah residents and produces tax revenue for the state. Domestic and international travelers and tourists are drawn to Utah’s natural, cultural and historical assets. Utah has 14 ski resorts, 10 of which are less than an hour from Salt Lake City International Airport, as well as five national parks, eight national monuments, two national recreation areas, one national historic site and 43 state parks. Throughout the year, Utah hosts several arts events, such as the Sundance Film Festival, Utah Shakespeare Festival, Utah Festival Opera, Tuacahn theater series, Moab Music Festival and Utah Arts Festival. In addition, Utah holds well-attended athletic events, meetings, conventions and trade shows that attract athletes and business travelers from outside of the state. While traveling in and around Utah, travelers spend their money on a variety of goods and services. This report provides a comprehensive overview of travel and tourism-related

Figure 1
Census Population Shares by Utah Travel Region, 2015



Source: Kem C. Gardner Policy Institute analysis of Utah Population Estimates Committee data

visitation, spending, employment, wages, sales, tax revenue and industry performance in Utah.

In 2015, travelers spent a record \$8.17 billion in Utah, generating an estimated \$1.15 billion in total state and local tax revenue.¹ Travel and tourism generated an estimated 142,500 total jobs in 2015 and \$4.28 billion in wages.² Utah’s 14 ski resorts and five national parks experienced record visitation and Utah visitors purchased more hotel rooms and spent more money on arts, entertainment, recreation and restaurants in Utah than ever before.

This report includes the most recent travel and tourism data available at the time of publication; in most cases, data reflect 2015 activity.

Utah Travel Regions

For purposes of this report, the Kem C. Gardner Policy Institute defined and divided Utah into seven travel regions, organized by geographic areas and counties. Figure 1 shows each Utah travel region with its share of the state's 2015 population. The Wasatch Front, Utah's metropolitan hub, and home to three-quarters of the state's population, is bordered by mountains on the east and lakes on the west.³ In general, travelers visit the Wasatch Front to ski, attend arts and cultural events, visit local attractions, attend conventions and trade shows, and shop and dine. The North Mountains region includes large portions of Wasatch-Cache and Uinta National Forests, mountain topography and eight state parks.⁴ Eastern Utah offers fly fishing, boating and river rafting opportunities in and around Flaming Gorge National Recreation Area, as well as abundant paleontological, archaeological and geological sites.⁵ Northwestern Utah provides basin and range geography, with rugged mountains, endless vistas and the unique Great Salt Lake ecosystem.⁶ Central Utah, located in the "heart" of the state, comprises rolling hills, agricultural lands, historic sites and popular ATV trail systems.⁷ Canyon Country, which is home to four of Utah's five national parks, attracts visitors to its unique redrock geology, recreational opportunities and scenic beauty.⁸ Dixie, in southwestern Utah, is the gateway to Zion National Park and has the warmest climate in the state, making it a fine area for year-round golf, outdoor theater and general recreation and leisure.⁹

Utah Travel and Tourism in a National Context

In 2015, domestic and international visitation increased to record levels, both nationally and statewide, due in large part to a healthy economy and relatively low gas prices. In 2015, national travel research firm TNS Global (TNS) reported a 20 percent year-over-year increase in domestic person-trips (leisure and business) to Utah. In addition, Utah national park visitation—a good indicator of international traveler activity—grew 16 percent from 2014 to 2015.

Looking ahead, the U.S. Department of Commerce predicts that international overnight visitors to the U.S. will reach a record 78.6 million in 2017 (up 2.4 percent from 2016). In addition, the Commerce Department predicts a 3.3 percent annual increase in international visitor volume with Mexico, China and Canada accounting for a majority of that inbound U.S. travel. In regards to high-growth markets, visitation from China is forecasted to increase more than 120 percent in the U.S. by 2021, followed by India (+70 percent) and Argentina,

Table 1
Western States' Share of Private Leisure and Hospitality Employment, 2015

Place	Private Leisure & Hospitality Employment	Total Private Employment	% Share
United States	15,100,935	118,307,717	12.8%
Montana	62,611	365,786	17.1%
Wyoming	36,132	215,998	16.7%
Colorado	312,338	2,097,611	14.9%
Arizona	297,600	2,224,536	13.4%
New Mexico	93,378	626,624	14.9%
California	1,815,830	13,916,502	13.0%
Oregon	191,300	1,509,012	12.7%
Idaho	67,817	551,238	12.3%
Utah	133,616	1,122,545	11.9%
Washington	305,403	2,589,020	11.8%

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

South Korea and Taiwan (+40 percent). As for international visitation to Utah, the Salt Lake City International Airport reported a 5 percent year-over-year increase in deplaned international visitors in 2015, most likely attributable to the addition of a Delta nonstop flight from Amsterdam that began in the spring of 2015.

According to the U.S. Travel Association (USTA), in 2015 domestic and international leisure and business travelers directly spent an estimated \$947.1 billion in the U.S., generating 8.1 million direct jobs, \$231.6 billion in payroll and \$147.9 billion in tax revenue (2 to 3 percent year-over-year increases). USTA notes that, in 2015, one out of nine jobs in the U.S. was dependent on travel and tourism, making travel among the top 10 industries in 49 states and D.C. in terms of employment. In a national and regional context, Utah's 12 percent share of private leisure and hospitality employment to total private employment is consistent with the U.S. (13 percent) and other western states (see Table 1).

Utah Visitor Spending and Profile

The travel and tourism industry contributes significantly to Utah's state and local economies. TNS and USTA provide the Utah Office of Tourism (UOT) with ongoing Utah visitor spending and demographic profile information. According to USTA, in calendar year 2015, travelers spent a record \$8.17 billion in Utah. Figure 2 shows USTA visitor spending estimates from 2011 to 2015. When adjusted for inflation, visitor spending increased 12 percent from 2011 to 2015 and 2 percent from 2014 to 2015. One reason visitor spending did not keep pace with Utah visitation was the price of gasoline,

Figure 2
Total Visitor Spending (Millions of 2015 Dollars)



Source: Kem C. Gardner Policy Institute analysis of TNS Global and USTA data

which was at its lowest since 2005.¹⁰ The \$8.17 billion in spending included direct nonresident (\$6.98 billion) and resident (\$1.19 billion) leisure and business traveler spending. According to TNS, nonresident travelers spend, on average, two to three times as much money during their Utah visit than resident travelers. Understanding who visits Utah from outside of the state and what motivates them to visit informs domestic and international tourism marketing.

Tourism Marketing

Utah Tourism Marketing Performance Fund

The Utah Tourism Marketing Performance Fund (TMPF) was established in 2005 by the Utah State Legislature. The TMPF is a performance-based fund tied to annual sales tax increases in 20 tourism-related industries. Funds are allocated to the UOT annually for tourism advertising and marketing in order to “increase the national and international awareness, inquiries, and tourism visits to Utah.”¹¹ Appropriations since fiscal year 2006 have ranged between \$6.95 million (FY2011) and \$15 million (FY2015).¹² In years that the TMPF tourism industry tax revenue grows by 3 percent or more, or more than the Consumer Price Index, the UOT is able to receive up to an additional \$3 million in funding. Annual allocations are divided between the UOT’s statewide tourism advertising program (70 percent), the UOT’s local co-op program (20 percent) and the Utah Sports Commission (10 percent).¹³

Winter Campaign

In Fall 2015, the UOT utilized the TMPF to implement its winter marketing campaign, which was an updated continuation of their Find Your Greatest campaign (first launched Fall 2014). According to Strategic Marketing and Research Insights (SMARI), the 2015-2016 campaign was “successful at communicating several key messages,” received higher evaluative creative ratings than the prior year and rated

stronger than concurrent winter advertising from Colorado, California, Wyoming and Montana.¹⁴ At the end of the winter campaign’s second phase, SMARI found that UOT’s 2015-2016 winter advertising campaign influenced travel from all markets and generated \$246 million in visitor spending.

Three-Season Campaign

In Spring 2016, the UOT placed a variety of three-season Mighty 5[®] campaign ads nationwide. Similar to the previous year, SMARI reported that this round of ads continued to communicate well that Utah has beautiful and dramatic scenery, outdoor adventure opportunities and many national parks. SMARI also discovered that Utah’s three-season ads performed better than their competitors of Arizona, Colorado and Wyoming, had a positive impact in “less proximate” and “less familiar” markets and produced a “halo effect” in regards to outsiders’ perception of Utah.¹⁵ In 2016, the UOT’s three-season marketing campaign generated \$1.48 billion in Utah visitor spending.

Domestic Visitation

TNS reported that in calendar year 2015 the majority of TravelsAmerica survey respondents visited Utah for leisure, drove their own vehicle (vs. flew) and stayed three to four nights on average. According to TNS, Utah visitors were the most likely to travel with children compared to those who ventured to surrounding western states. TNS noted that in 2015, Utah visitors stayed longer (3.7 nights) compared to 2014 (3.2 nights). In addition, more nonresident visitors participated in outdoor recreation than resident visitors, and young visitors were more likely to pursue participatory activities like outdoor recreation and adventure sports. The largest segment of nonresident travelers visited Utah to see friends and family and, although they spent the least amount of money per travel party size, they collectively spent the most money in Utah. In addition to visiting friends and family, the majority of nonresident respondents explored rural Utah, shopped, visited national and state parks, skied and snowboarded (in the winter months) and visited historic sites and churches.

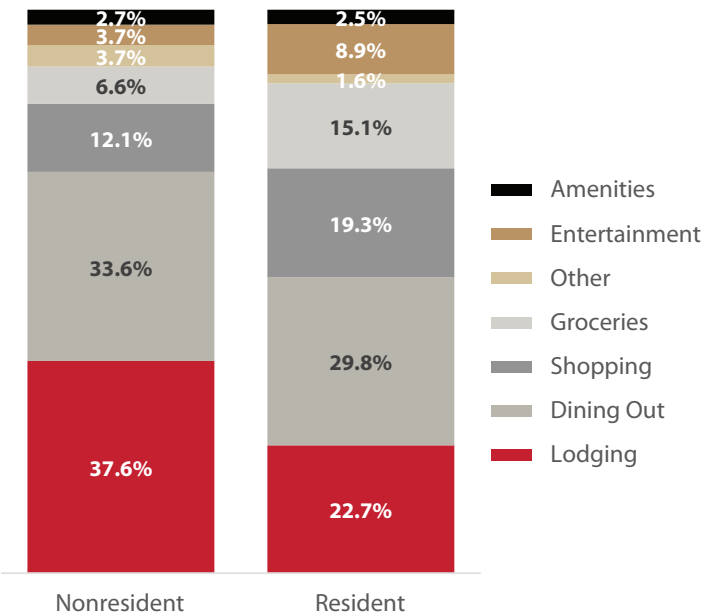
Table 2 shows total domestic and international, resident and nonresident, and business and leisure spending by spending category. Both nonresident and resident travelers spent the most money on transportation, whether auto-based or public (airline, rail, bus). If transportation costs are removed, visitors from out-of-state spent the largest shares of their total spending on lodging and dining out. Resident travelers, on the other hand, spent relatively larger shares on groceries, shopping and entertainment compared to their nonresident counterparts (see Figure 3).

Table 2
Total Utah Visitor Spending by Spending Category, 2015
(Millions of Dollars)

Spending Category	Nonresident	Resident	Total
Auto Transportation (gasoline, car rental, parking, etc.)	\$1,977	\$514	\$2,491
Public Transportation (airfare, train, bus, taxi, etc.)	\$1,611	\$123	\$1,734
Lodging	\$1,277	\$125	\$1,402
Food/Beverage/Dining (excluding groceries)	\$1,141	\$164	\$1,304
Shopping/Gifts/Souvenirs	\$412	\$106	\$518
Groceries	\$224	\$83	\$307
Entertainment/Admissions	\$124	\$49	\$173
Other	\$127	\$9	\$136
Amenities (golf fees, spa, health club, ski passes, etc.)	\$90	\$14	\$104
Total	\$6,982	\$1,186	\$8,169

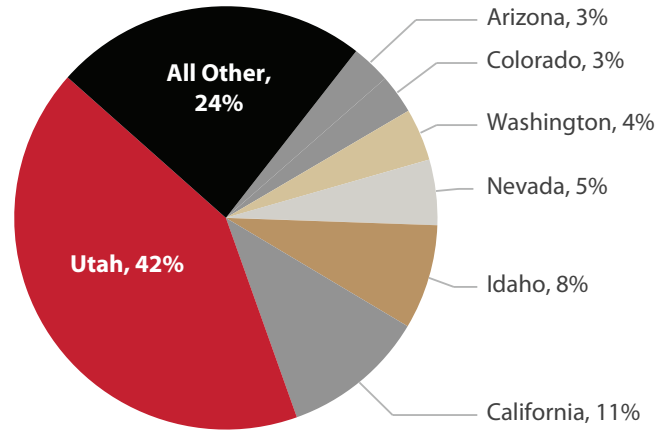
Source: TNS Global

Figure 3
Utah Visitor Spending Shares by Spending Category, 2015



Note: Transportation spending has been removed.
Source: Kem C. Gardner Policy Institute analysis of TNS Global data

Figure 4
Share of Total Utah Visitors by State, 2015



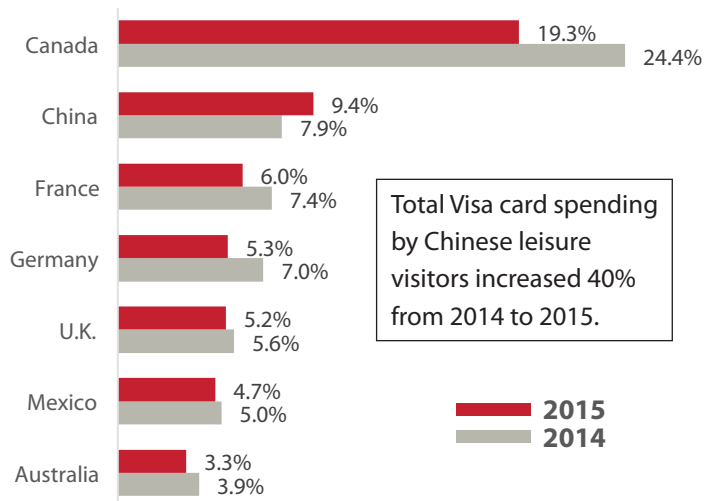
Source: TNS Global

In their 2015 Utah TravelsAmerica Visitor Profile report, TNS highlighted the fact that not all of Utah's key domestic source markets border Utah (e.g. California and Washington), which is unique for a western state (see Figure 4). Compared to the last few years, visitation from Texans decreased while visitation from Washington residents increased. According to TNS, the greatest numbers of nonresident visitors originated from Los Angeles, Idaho Falls/Pocatello, Spokane, Las Vegas and Denver. Survey data also indicated that Salt Lake City and Provo attracted the most visitors overall. Nonresident travelers visited more areas in Utah (1.9 areas) than resident travelers (1.4 areas) during their stay. Despite how or where they traveled, 91 percent of nonresident, and 92 percent of resident, visitors surveyed reported being "extremely/very satisfied" with their Utah travel experience, up 5 to 6 percentage points from last year and the highest marks ever received from Utah visitors on TravelsAmerica surveys.

International Visitation

International travelers and tourists visit Utah each year to ski, explore national parks, visit cultural sites and attend conventions, trade shows and conferences.¹⁶ In 2015, Utah's top international leisure markets were Canada, China, France, Germany, United Kingdom, Mexico and Australia, in that order (see Figure 5).¹⁷ VisaVue® spending records revealed a 40 percent year-over-year increase in total Chinese leisure visitor Visa card spending in 2015, while Mexico visitor card spending was up 11 percent and U.K. visitor card spending was up 9 percent. In contrast, visitors from Australia, Canada, France and Germany spent less total dollars on their Visa cards in Utah than the previous year.

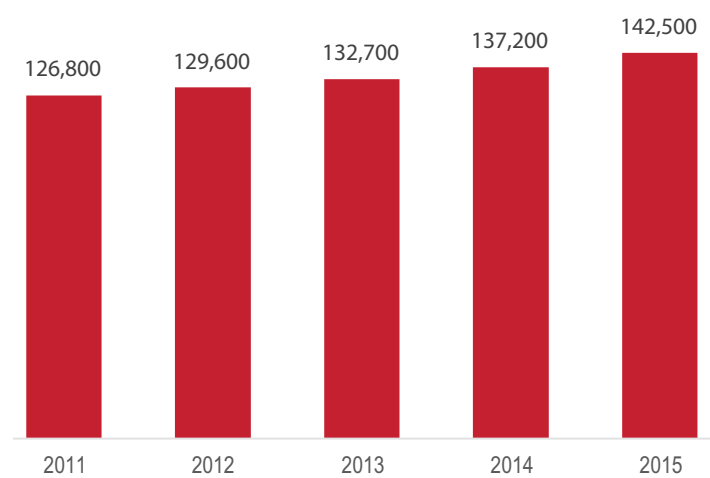
Figure 5
Share of Visitor Visa Card Spending by Country, 2014-2015



Note: Estimates are based on and extrapolated from aggregate depersonalized card usage data provided for the calendar years of 2014 and 2015 and include consumer card accounts only.

Source: Kem C. Gardner Policy Institute analysis of VisaVue® Travel data

Figure 6
Total Employment Generated by Travel Spending in Utah*



Note: *Direct, indirect and induced

Source: Kem C. Gardner Policy Institute analysis of Utah Department of Workforce Services data

Travel-Generated Employment

Travel and tourism spending supports a significant number of Utah jobs; however, defining travel-generated employment is complex because travel and tourism is not a distinct industry such as manufacturing or construction. Instead, travel and tourism is an assortment of industries, comprised of goods and services purchased by the traveler prior to, during and even after a trip. The travel and tourism industry can be characterized as an export industry in that its goods and services, produced across multiple and diverse industry sectors, are purchased with income earned outside of the region.

In 2015, nonresident and resident travel and tourism spending supported an estimated 142,500 direct, indirect and induced jobs, as well as \$4.3 billion in payroll (see Figure 6). Direct travel- and tourism-generated employment (travel jobs) includes jobs where the employee is involved firsthand in the travel and tourism industry (e.g. travel agents, tour guides, hoteliers, restaurant servers, taxi drivers). Indirect travel jobs support direct travel jobs, such as hotel product wholesalers and recreational gear manufacturers. Induced employment includes jobs created when direct and indirect employees spend their paychecks in the local economy (e.g. grocery store clerks, bank tellers, pharmacists).

The Gardner Policy Institute estimated total travel-generated employment in Utah by selecting public and private jobs in nationally-recognized travel-related industries, weighting them for Utah and applying RIMS II multipliers.¹⁸ Travel-generated employment considered in this report includes jobs

in accommodations, automotive and equipment rental (car, RV, and recreational gear), transportation (air, bus, taxi, rail, shuttle and scenic), travel arrangements, arts, entertainment, recreation, foodservice, parking lots, auto repair and retail (shopping, gas stations and groceries). Total travel-generated jobs grew 12 percent from 2011 to 2015 and 4 percent from 2014 to 2015. Travel-generated wages, however, increased at nearly twice the rate as jobs. Inflation-adjusted wages increased 20 percent from 2011 to 2015 and 8 percent from 2014 to 2015.

Private Leisure and Hospitality Employment by Region

Travel-generated job and wage data by detailed travel-related subsector (e.g. air transportation, car rental, charter bus, taxi and limousine and recreational gear rental) are often not disclosed at the local level by state and national institutions in order to ensure employer confidentiality. Because detailed county employment data is widely unavailable, it is difficult to make consistent comparisons among Utah travel regions and counties using the same methodology. However, it is possible to make region-to-region and county-to-county employment and wage comparisons for the larger “leisure and hospitality” sector.¹⁹

Calculating a region’s share of private leisure and hospitality jobs to total private jobs is one way to estimate the economic significance of the travel and tourism industry to a Utah region or county. When comparing the number of private leisure and hospitality jobs to total private jobs in Utah’s seven travel regions, there are significant differences between the regions. For instance, in 2015, 41 percent of all jobs in Canyon Country were in the leisure and hospitality sector, followed by 21 percent in the North Mountains region and 18 percent in the

Dixie region. It is interesting to note that four of Utah's five national parks are in Canyon Country and the fifth national park is in Dixie.²⁰ Likewise, the North Mountains region is home to six ski resorts, eight state parks and large tracts of national forest.

Annual private leisure and hospitality jobs increased in six of seven Utah travel regions from 2011 to 2015. The Wasatch Front region experienced the greatest post-recession growth in the leisure and hospitality sector (19 percent) followed by the Dixie region (17 percent) and the North Mountains (13 percent). Only the Northwest region experienced a small decrease in annual leisure and hospitality jobs over the past five years. Between 2011 and 2015, statewide leisure and hospitality employment grew 17 percent while all other statewide employment grew at a lesser rate of 16 percent.

Private Leisure and Hospitality Jobs by County

At the county level, Garfield County and Daggett County had the greatest private leisure and hospitality job shares (56 and 49 percent, respectively), followed by Grand, Kane, Summit and Wayne counties (see Figure 7).

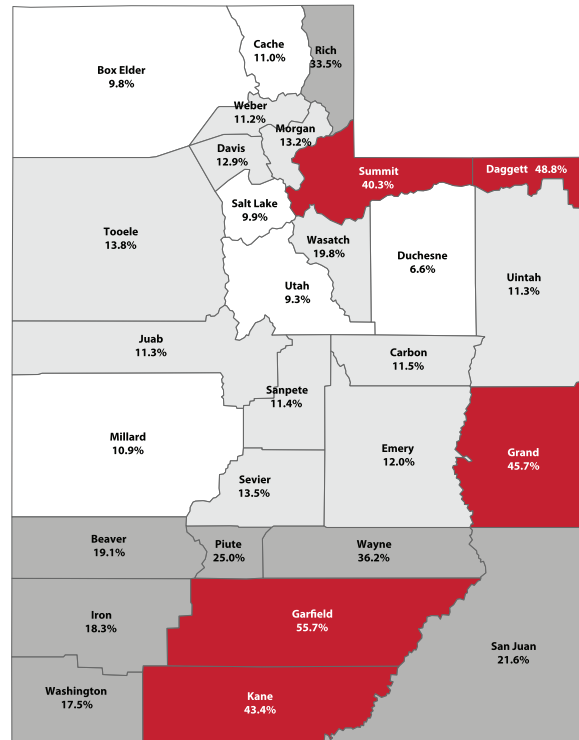
From 2011 to 2015, private leisure and hospitality employment grew more than 10 percent in 17 of Utah's 29 counties. Rich County experienced the greatest private leisure and hospitality employment growth (30 percent) over the past five years, followed by Morgan (29 percent), Utah and Daggett (27 percent each), and Kane (25 percent). Rich County, which had the greatest relative increase in annual leisure and hospitality jobs, added 27 accommodation jobs and 12 foodservice jobs from 2011 to 2015. Overall, Utah County added the most leisure and hospitality jobs over the past five years (3,814), including 3,305 foodservice jobs, 307 arts, entertainment and recreation jobs and 202 accommodations jobs.

The Seasonal Nature of Travel and Tourism in Utah

Utah's travel and tourism industry is seasonal in nature due to Utah's geography, climate and natural amenities. In the winter, skiers and snowboarders are drawn to Utah's 14 ski resorts, 10 of which are located less than an hour from Salt Lake City International Airport. During the spring, summer and fall, travelers and tourists visit and explore Utah's national parks, monuments and other wilderness areas.

To highlight the seasonality of the travel and tourism industry at the regional or county level, the Gardner Policy Institute examined several years of leisure and hospitality jobs by quarter. Based on quarterly employment data provided by Utah's Department of Workforce Services, Summit County,

Figure 7
Private Leisure and Hospitality Sector Jobs as a Percent of Total Private Employment, 2015

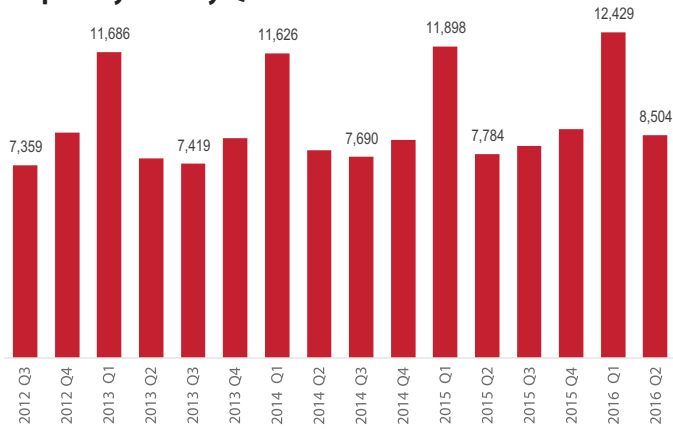


Source: Kem C. Gardner Policy Institute analysis of Utah Department of Workforce Services data

in the North Mountains travel region, experiences well-defined winter seasonality. Summit County has two ski resorts (including Deer Valley and Park City Mountain—the latter of which is currently the largest ski resort in the United States) and several winter recreation activity venues. In addition, Park City (Summit County's largest city) hosts the annual Sundance Film Festival, which has been held every January since 1985 and attracts upwards of 30,000 nonresident attendees (Meppen and Tennert 2016). Kem C. Gardner Policy Institute's economic impact study of the 2016 Sundance Film Festival estimated 31,200 nonresident attendees spent a total of \$51.3 million in Utah (an average of \$286 per person per day), the majority of which (84 percent) was spent on lodging, meals, and retail shopping. The report also estimated that the festival generated approximately 1,400 Utah jobs, \$43 million in wages, \$72 million in gross domestic output and nearly \$8 million in state and local tax revenue.

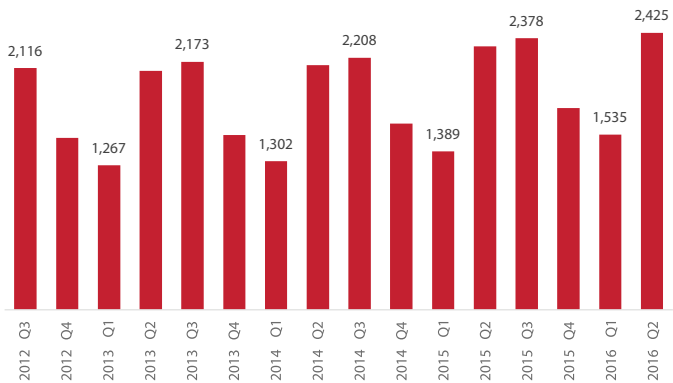
As Figure 8 shows, leisure and hospitality jobs spike in Summit County during peak skiing and snowboarding season in the first quarter (January through March) of each year. Even though Summit County clearly exhibits winter seasonality, summer leisure and hospitality employment in the county has been increasing at a faster rate than winter employment as Park City continues to develop its off-season travel markets.

Figure 8
Summit County: Average Private Leisure and Hospitality Jobs by Quarter



Source: Utah Department of Workforce Services

Figure 9
Grand County: Average Private Leisure and Hospitality Jobs by Quarter



Source: Utah Department of Workforce Services

For instance, Summit County’s winter employment has grown 9 percent over the past five years while its off-season summer employment has grown 16 percent.

In contrast to winter tourism seasonality, Grand County, located in the Canyon Country travel region, is a Utah county that experiences warm weather seasonality. Grand County is home to two national parks, whitewater rafting, mountain biking, rock climbing, athletic events, art and music festivals, jeep safari and many other local seasonal attractions that run from late March through early November. Utah Department of Workforce Services data in Figure 9 illustrates how leisure and hospitality jobs in Grand County peak in quarters two and three, or April through September, with a significant drop in the number of jobs during quarters four and one, or October through March. Similar to Summit County, however, Grand County’s off-season (fall and winter) leisure and hospitality employment sector has been growing at a faster average annual rate than spring and summer employment. Over the past five years, its winter

employment has grown 33 percent while its spring and summer employment (combined) has grown 19 percent. Possible explanations for Grand County’s relative growth in off-season leisure and hospitality employment include increasing numbers of resident travelers visiting Grand County during the off-season to avoid seasonal crowds and/or to take advantage of milder winter temperatures.

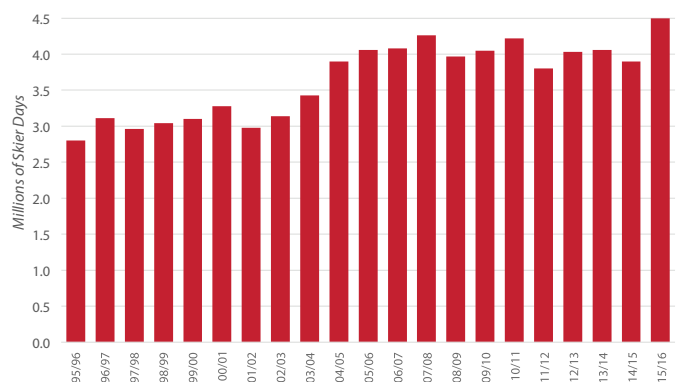
Skiing and Snowboarding in Utah

Utah’s skiing and snowboarding industry experienced a couple of firsts during the 2015-2016 season. It was the first season that Utah operated the largest resort in the U.S. (Park City Mountain) and the first season Ski Utah reported 4.5 million skier days—a new record. Although better than the previous season, 2015-2016 snowfall was nowhere near record levels; however, that did not stop visitors from skiing and snowboarding in high numbers at Utah resorts.

According to Ski Utah’s 2016 “What’s New…” report: Snowbird Ski and Summer Resort recently spent \$35 million on improvements, including a reconstruction of its Creekside Lodge (considered the base of resort operations), which will triple its square footage; Powder Mountain Resort continued to limit its annual ticket sales and season passes in order to keep down skier density; Ogden Valley opened Whisper Ridge Cat Skiing, a new private facility that offers single- to multi-day cat skiing tours and heli-skiing; Sundance Resort replaced a triple chair with a quad chair (Arrowhead Lift); and Cherry Peak opened for its second season.

During the 2016-2017 ski season, marketing research firm RRC Associates plans to conduct their next on-mountain survey at all 14 Utah ski resorts. Their previous survey research, which was conducted during the 2014-2015 ski season, showed that the economic impact of Utah ski resort visitors was around \$1.3 billion.

Figure 10
Utah Total Skier Days



Source: Ski Utah

Park Visitation in Utah

Utah has a unique topography consisting of Rocky Mountain, Colorado Plateau and basin and range geography. A large percent of Utah’s dramatic landscape and relics of its Native American and pioneer heritage are organized into federal and state parks that aim to preserve and educate visitors about Utah’s natural, cultural and historical assets. Utah has five national parks, eight national monuments (including Bears Ears National Monument, designated December 2016), two national recreation areas, one national historic site, 43 state parks, 23 million acres of BLM land, 26 scenic byways, five state-operated welcome centers and over 8 million acres of national forest, offering a variety of opportunities to travelers and recreationists.

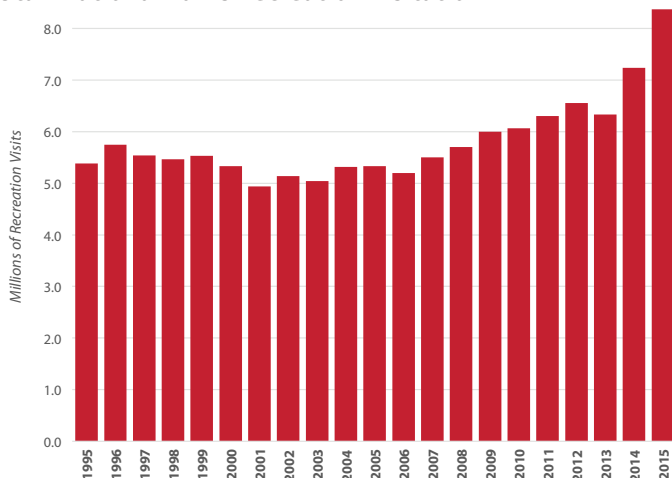
National Parks and Places

In June 2016, the National Park Service (NPS) issued its annual “Visitor Spending Effects” report detailing non-local visitation to Utah parks and places in federal fiscal year 2015 and resultant spending, supported jobs, labor income, value added and economic output.²¹ According to the NPS analysis, over 12 million recreation visits to Utah’s national parks and places generated \$844.2 million in spending, the majority of which supported the economies of Utah’s rural gateway communities. In fact, the NPS report estimates that visitor spending supported more than 14,000 Utah jobs, \$435.9 million in labor income, \$706.2 million in value added and \$1.3 billion in economic output in the Utah economy.

National Parks

According to the most recent NPS visitation numbers, 2015 was another record year for Utah national parks, with 8.4 million recreation visits (up 16 percent from 2014). Visitation to Utah’s national parks has been on a steady uphill climb for the

Figure 11
Utah National Parks Recreation Visitation



Source: U.S. National Park Service

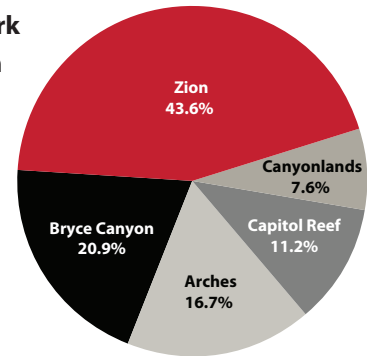
Table 3

Utah National Park Recreation Visitation by Park

Utah National Parks	2014	2015	% Change
Arches NP	1,284,767	1,399,247	8.9%
Bryce Canyon NP	1,435,741	1,745,804	21.6%
Canyonlands NP	542,431	634,607	17.0%
Capitol Reef NP	786,514	941,029	19.6%
Zion NP	3,189,696	3,648,846	14.4%
Total NP Visits	7,239,149	8,369,533	15.6%

Source: U.S. National Park Service

Figure 12
Share of National Park Recreation Visitation by Park, 2015



Source: U.S. National Park Service

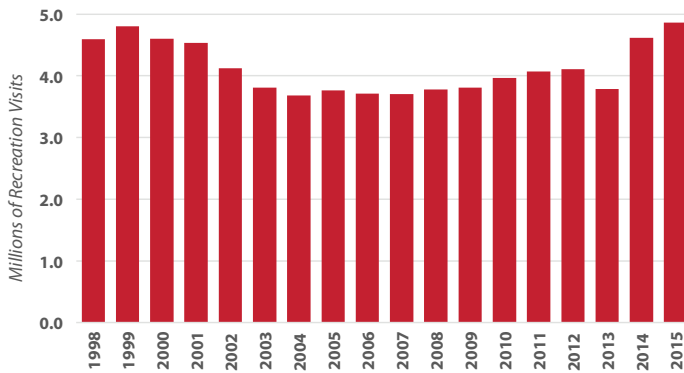
past 10 years, but has made significant year-over-year leaps in 2014 and 2015 (see Figure 11). Preliminary NPS data indicates there were more than 10 million recreation visits to Utah national parks in 2016—another record year.

Based on NPS visitation data, while all Utah national parks experienced increased visitation post-recession (since 2011), Arches experienced the greatest increase (27 percent), followed by Canyonlands (24 percent) and Zion (20 percent). Table 3 shows 2014 and 2015 Utah national park recreation visitation, including year-over-year percent changes. In 2015, Zion National Park reported the largest share of visitors at nearly 44 percent (see Figure 12).

National Places

In 2015, the NPS and BLM reported a 5 percent year-over-year increase in total national place visitation and a 20 percent increase in visitation from 2011 to 2015 (see Figure 13). Golden Spike National Historic Site reported the greatest year-over-year increase in visitation (34 percent), followed by Hovenweep National Monument (31 percent) and Rainbow Bridge National Monument (23 percent) (see Table 4). At the time of publication, visitation data for Flaming Gorge National Recreation Area and the new Bears Ears National Monument were not available.

Figure 13
Utah National Place Recreation Visitation



Source: U.S. National Park Service
*Does not include Flaming Gorge NRA or Bears Ears NM data

Table 4
Utah National Place Visitation by Place

Utah National Places	2014	2015	% Change
Cedar Breaks NM	762,907	793,601	4.0%
Dinosaur NM	250,625	291,799	16.4%
Glen Canyon NRA	2,368,452	2,495,093	5.3%
Golden Spike NHS	44,125	59,147	34.0%
Grand Staircase-Escalante NM	917,320	912,055	-0.6%
Hovenweep NM	26,808	35,117	31.0%
Natural Bridges NM	87,119	94,797	8.8%
Rainbow Bridge NM	62,910	77,270	22.8%
Timpanogos NM	95,679	104,023	8.7%
Total NM, NRA, and NHS Area Visits	4,615,945	4,862,902	5.4%

Source: U.S. National Park Service
*Does not include Flaming Gorge NRA or Bears Ears NM data

State Parks

Utah’s Division of State Parks manages 43 state parks and administers the Utah off-highway-vehicle, boating and trails program. Although records of state park visitation have been kept as far back as 1980, several state parks have been decommissioned or created since then. Table 7 shows state park visitation for 39 of Utah’s 43 state parks for fiscal years 2015 and 2016. According to state park data, Sand Hollow, Dead Horse Point, Jordanelle, Antelope Island, Great Salt Lake Marina and Wasatch Mountain state parks recorded the most visitation at well over 300,000 visitors per year. Goosenecks, Millsite, Great Salt Lake Marina, Gunlock Reservoir, Goblin Valley and Wasatch Mountain state parks all experienced at least 25 percent year-over-year increases in visitation; only Piute Reservoir reported a greater than 25 percent year-over-year decrease in visitation. Overall, there was a 16 percent increase in total Utah state park visitation (see Table 5, next page).

Meetings, Conventions and Trade Shows

Throughout the year, Utah hosts numerous meetings, conventions and trade shows that attract nonresident visitors (attendees) to Utah and new dollars to its economy.

Salt Lake County is home to Salt Lake City, Utah’s largest city and one of the state’s most popular tourist destinations (Salt Lake’s Historic Temple Square is Utah’s most-visited attraction). It is also home to Utah’s two largest convention centers, the Salt Palace and the South Towne Expo Center. Salt Lake County conventions and similar events draw more than 300,000 out-of-town attendees annually and drive an estimated one million visitor days.²²

According to STR, Inc., Salt Lake County hotel revenues were more than \$515 million in 2016, an almost 4 percent year-over-year increase from record revenues in 2015. This represents a \$140 million increase in annual hotel income since 2012. Attendees that stayed in downtown Salt Lake City hotels were a significant generator of increased revenues. Visit Salt Lake notes that downtown hotel room “compression” forces room rates up and pushes many visitors outside of the city center to accommodations in Sandy, West Valley and other Salt Lake County cities. During their event, attendees patronize local restaurants and bars, participate in city nightlife, shop around town and pursue different forms of culture, entertainment and recreation. In 2016, attendees spent around \$300 million dollars in the Salt Lake County economy, generating jobs as well as state and local tax dollars.²³

Outside of Salt Lake County, Davis, Grand, Iron, Summit, Uintah, Utah, Washington and Weber counties also have conference centers. Although conference and meeting venues outside of Utah’s capital city do not generate as much annual hotel revenue as Salt Lake County venues, they do attract an additional portion of overnight business travelers who participate in the local culture and spend money in the local economy.

Travel-Related Sales and Sales Tax Revenue

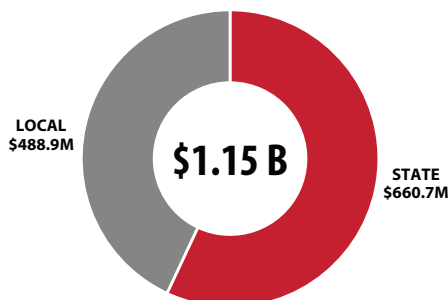
In 2015, the record \$8.17 billion in Utah visitor spending generated an estimated \$1.15 billion in state and local tax revenue (see Figure 14).²⁴ This total estimated tax revenue, composed of \$489 million in local and \$661 million in state tax revenue, is associated with all direct, indirect and induced economic activity supported by nonresident and resident visitor spending. In Utah, a large portion of total travel-related tax revenue comes from sales taxes collected on visitor purchases. Each taxable sale in Utah generates a combination

Table 5
Utah State Park Visitation by Park

Utah State Park	FY15	FY16	% Change FY15-FY16
Anasazi Indian Village State Park Museum	19,827	20,824	5.0%
Antelope Island State Park	380,611	398,147	4.6%
Bear Lake State Park	229,199	249,781	9.0%
Camp Floyd - Stage Coach Inn	15,197	13,623	-10.4%
Coral Pink Sand Dunes State Park	79,579	82,427	3.6%
Dead Horse Point State Park	383,478	403,737	5.3%
Deer Creek State Park	228,630	283,744	24.1%
East Canyon State Park	97,380	85,163	-12.5%
Edge Of The Cedars State Park Museum	10,724	9,626	-10.2%
Escalante Petrified Forest State Park	47,318	52,110	10.1%
Fremont Indian State Park	14,808	17,550	18.5%
Frontier Homestead State Park Museum	7,466	9,265	24.1%
Goblin Valley State Park	140,292	191,414	36.4%
Gooseheads State Park	20,270	51,985	156.5%
Great Salt Lake Marina	266,784	396,911	48.8%
Green River State Park	48,566	56,828	17.0%
Gunlock Reservoir	9,943	14,423	45.1%
Huntington State Park	25,191	30,708	21.9%
Hyrum State Park	67,846	75,073	10.7%
Jordanelle State Park	357,869	403,136	12.6%
Kodachrome Basin State Park	91,157	107,850	18.3%
Millsite State Park	13,075	28,805	120.3%
Otter Creek State Park	27,240	31,361	15.1%
Palisade State Park	103,979	113,713	9.4%
Piute Reservoir	2,103	1,302	-38.1%
Quail Creek State Park	75,113	83,017	10.5%
Red Fleet State Park	24,319	28,506	17.2%
Rockport State Park	105,757	118,556	12.1%
Sand Hollow State Park	351,339	433,152	23.3%
Scofield State Park	25,316	21,860	-13.7%
Snow Canyon State Park	254,730	272,041	6.8%
Starvation State Park	87,196	100,489	15.2%
Steinaker State Park	30,923	37,519	21.3%
Territorial Statehouse State Park Museum	7,308	7,957	8.9%
Utah Field House Of Natural History	50,923	58,042	14.0%
Utah Lake State Park	150,418	132,954	-11.6%
Wasatch Mountain State Park	259,390	336,230	29.6%
Willard Bay State Park	259,022	297,837	15.0%
Yuba State Park	97,022	105,819	9.1%
Total Visits	4,467,308	5,163,485	15.6%

Source: Utah State Parks

Figure 14
Total Estimated
Travel-Generated
Tax Revenue, 2015



Note: *Includes direct, indirect and induced revenue.
Source: Kem C. Gardner Policy Institute analysis of Utah State Tax Commission data

of state and local tax revenue. Although not all traveler purchases are taxable transactions (e.g. transportation fares), the majority of travel-related purchases are taxed. It must also be noted, however, that taxable sale amounts listed in this report include a portion of out-of-state sales that were charged a "use tax."²⁵

Table 6 shows total leisure and hospitality taxable sales from calendar year 2011 through 2015, as reported by the Utah State Tax Commission. When adjusted for inflation, leisure

Table 6
Leisure and Hospitality Industry Taxable Sales

(Millions of 2015 Dollars)

Industry	2011	2012	2013	2014	2015	% Change 2011-2015	% Change 2014-2015
Performing Arts, Spectator Sports, Related	\$85.1	\$103.3	\$115.4	\$109.8	\$116.8	37.2%	6.3%
Museums, Historical Sites, Zoos, Parks, Similar	\$29.4	\$34.1	\$28.1	\$36.4	\$32.8	11.7%	-9.8%
Amusement & Recreation	\$354.1	\$373.5	\$398.5	\$473.9	\$571.6	61.4%	20.6%
Hotels, Motels, B&Bs, Resorts, Other	\$1,176.6	\$1,245.1	\$1,305.8	\$1,369.0	\$1,529.7	30.0%	11.7%
RV Parks, Camps	\$28.6	\$30.0	\$30.9	\$32.8	\$38.0	32.8%	15.8%
Restaurants & Other Eating Places	\$3,049.1	\$3,196.0	\$3,339.1	\$3,539.2	\$3,876.0	27.1%	9.5%
Special Food Services, Food Carts	\$281.4	\$298.2	\$324.8	\$360.1	\$399.0	41.8%	10.8%
Drinking Places (alcoholic beverages)	\$96.7	\$103.3	\$103.0	\$109.7	\$116.1	20.1%	5.8%
Total	\$5,101.0	\$5,383.6	\$5,645.5	\$6,031.0	\$6,680.0	31.0%	10.8%

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

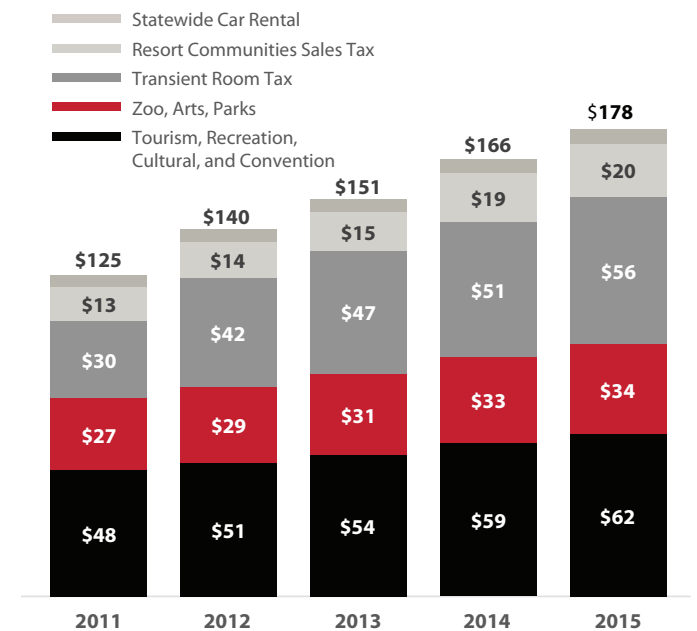
and hospitality sales, as a group, increased 31 percent over the past five years and 11 percent over the past year, with the largest year-over-year increases in amusement and recreation (21 percent), RV parks and camps (16 percent) and accommodations (12 percent). The only leisure and hospitality subsector to experience a year-over-year decrease in sales was museums, historical sites, zoos and parks (down 10 percent). Otherwise, in 2015 all other leisure and hospitality sector taxable sales experienced at least 6 percent increases.

When adjusted for inflation, total travel-related tax revenues have increased 46 percent from 2011 to 2015 and 7 percent from 2014 to 2015 (see Figure 15).²⁶ Municipal transient room taxes experienced the largest year-over-year increase (12 percent), followed by county transient room taxes (10 percent) and resort communities' sales taxes (8 percent).

Travel and Tourism Industry Performance

To understand recent travel and tourism industry performance, the Gardner Policy Institute analyzed Utah's accommodations, transportation, arts, entertainment and recreation and foodservice industry data published by the U.S. Bureau of Economic Analysis (BEA) and Utah Department of Workforce Services (DWS). Because the share of total statewide visitor retail spending is relatively small (an estimated 3 to 5 percent of total retail sales are generated by travelers), the performance of the retail sector has not been included in this analysis.

Figure 15
Total Travel-Related Sales Tax Revenue
(Millions of 2015 Dollars)

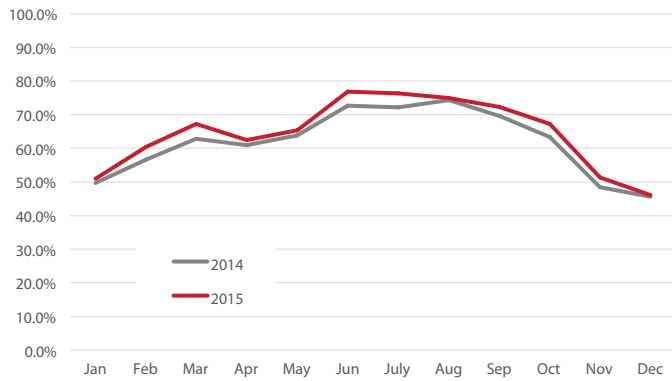


Source: Kem C. Gardner Policy Institute analysis of Utah State Tax Commission data

Accommodations Industry Performance

Taxable accommodation sales indicate trends in spending by travelers and tourists across the state. According to the Utah State Tax Commission, \$1.57 billion was spent on accommodations in the state of Utah in 2015. Accommodations include hotels, motels, bed and breakfasts, campgrounds and similar businesses. Based on hotel and lodging data provided by STR, Inc., Utah's average occupancy rates experienced year-over-year increases in all 12 months of 2015, with the greatest increases reported in March, June

Figure 16
Average Statewide Occupancy Rates by Month



Source: STR, Inc. Republication or other pre-use of this data without the express written permission of STR, Inc. is strictly prohibited.

Table 7
Average Daily Room Rates by Top Travel and Tourism Counties

County	2014	2015	% Change
Garfield-San Juan-Wayne	\$96.73	\$100.04	3.4%
Grand	\$121.25	\$132.99	9.7%
Salt Lake	\$98.06	\$104.52	6.6%
Summit-Wasatch	\$217.71	\$230.72	6.0%
Washington	\$97.65	\$100.93	3.4%

Source: STR, Inc. Republication or other pre-use of this data without the express written permission of STR, Inc. is strictly prohibited.

and July (see Figure 16). Utah hotels' average daily rates surpassed 2014 figures as well (see Table 7). The Utah State Tax Commission reported that taxable sales in the accommodations industry, adjusted for inflation, grew 29 percent from 2011 to 2015 and 11 percent from 2014 to 2015. Utah's Department of Workforce Services data shows a 3 percent increase in 2015 accommodation industry employment and a 9 percent increase in wages. In 2015, the private accommodations industry provided 19,802 average annual jobs (does not include proprietors) and \$486.8 million in wages.

Table 8
Utah's Passenger Air Industry

Year	Total Deplaned Passengers	% Annual Change	Year	Employment	% Annual Change	Year	Wages (\$Millions)	% Annual Change
2011	10,196,611	-2.5%	2011	6,553	2.9%	2011	\$373.3	10.9%
2012	10,064,456	-1.3%	2012	6,222	-5.1%	2012	\$365.6	-2.1%
2013	10,083,831	0.2%	2013	5,960	-4.2%	2013	\$388.1	6.2%
2014	10,569,675	4.8%	2014	6,141	3.0%	2014	\$391.4	0.9%
2015	11,073,700	4.8%	2015	6,053	-1.4%	2015	\$435.7	11.3%

Source: Kem C. Gardner Policy Institute analysis of Salt Lake City International Airport and U.S. Bureau of Labor Statistics data

Transportation Industry Performance

The performance of Utah's transportation industry, which includes passenger air, rail, transit and ground transportation, as well as travel arrangements and reservation services, has generally made strides in both employment and wages since the end of the recession in 2009.

Passenger Air Industry

Utah has one international airport located in Salt Lake City, as well three additional primary commercial airports.²⁷ Salt Lake City International Airport (SLC) offers direct flights to multiple domestic destinations and to 11 international destinations.²⁸ The Salt Lake City International Airport records passenger numbers on a monthly and annual basis. Passenger data show that SLC usually receives the largest volume of passengers during the months of March, June, July and August. Of total SLC passengers in 2015, approximately 2.6 percent were international travelers.²⁹

Table 8 shows the annual percent change of total deplaned passengers, as well as employment and wages for scheduled air transportation, from 2011 to 2015. While the total number of deplaned passengers grew 5 percent, employment remained flat and wages increased 11 percent. As of 2015, Utah's private airline industry provided 6,053 average annual jobs (does not include proprietors) and \$435.7 million in wages.

Passenger Rail Industry

Amtrak passenger rail serves Utah with one long-distance train, the California Zephyr, which crosses from Chicago to San Francisco daily. Utah currently has four Amtrak stations: Green River, Helper, Provo and Salt Lake City. Although Amtrak ridership in Utah was up 11.5 percent in federal fiscal year 2016, industry spending, employment and direct wages were down slightly from the previous year.³⁰ In federal fiscal year 2016, Amtrak's ridership was 51,379 and they reported spending of \$3.3 million on goods and services in Utah, most of which (\$2.8 million) was spent in Salt Lake County. Amtrak provided 45 direct Utah jobs and \$4.1 million in wages in federal fiscal year 2016.

Transit and Ground Passenger Transportation

Utah's transit and ground passenger transportation sector includes mixed-mode transit, commuter rail, bus transportation, special needs transportation, airport shuttle and other transit and ground passenger transportation.

According to Utah Department of Workforce Services data, from 2014 to 2015 private employment and wages in this sector increased 8 percent and 14 percent, respectively.

In 2015, Utah's private transit and ground passenger transportation industry supplied 1,521 annual average jobs (does not include proprietors) and \$38.1 million in wages.

Charter Bus, Taxi and Limousine

In 2015, the charter bus industry experienced a 16 percent year-over-year increase in private employment and a 30 percent increase in wages, while taxi and limousine jobs and wages grew at lesser rates of 7 and 5 percent, respectively.

These industries (private) provided a combined total of 840 average annual jobs (does not include proprietors) and \$21.3 million in wages.

Travel Arrangement and Reservation Services

From 2014 to 2015, employment in the travel arrangement and reservation services sector increased 9 percent and annual average wages increased 11 percent. This shows growth in a travel and tourism related sector that had experienced little to no growth between 2012 and 2014. In 2015, this sector reported 5,838 annual average jobs (does not include proprietors) with \$169.9 million in wages.

Arts, Entertainment and Recreation Industry Performance

Although arts, entertainment and recreation (AER) industry performance is not tied as closely to the travel and tourism industry as sectors like accommodations and transportation, traveler purchases do support a portion of jobs in the AER sector.³¹ Table 9 shows private and public employment and wages, as well as gross taxable sales data from 2014 to 2015.³² This sector includes Utah's ski industry, nature parks, museums, zoos, historical sites, amusement parks, performing arts and spectator sports. Utah's AER sector fared well in 2015, with taxable sales up over 16 percent from the previous year. Whereas last year there was a significant increase in local government amusement and recreation jobs, in 2015 private amusement and recreation jobs increased the most (5 percent). In 2015, Utah's entire AER industry supported a combined 45,372 average annual jobs (does not include proprietors) and \$934.6 million in wages.

Table 9

Utah's Arts, Entertainment and Recreation Industry

Key Measurement	2014	2015	% Change
Private Employment	38,760	40,852	5.4%
Private Earnings (\$Millions)	\$761.2	\$824.5	8.3%
Public Employment	6,612	6,695	1.3%
Public Wages (\$Millions)	\$107.5	\$110.1	2.4%
Taxable Sales (\$Millions)	\$620.1	\$721.3	16.3%

Source: Kem C. Gardner Policy analysis of Utah Department of Workforce Services and Utah State Tax Commission data

Table 10

Utah's Foodservice Industry

Key Measurement	2014	2015	% Change
Employment	88,809	92,747	4.4%
Wages (\$Millions)	\$1,270.0	\$1,397.8	10.1%
Taxable Sales (\$Millions)	\$4,009.0	\$4,391.1	9.5%

Source: Kem C. Gardner Policy analysis of Utah Department of Workforce Services and Utah State Tax Commission data

Foodservice Industry Performance

The food services and drinking places (foodservice) industry sector, which includes restaurants and bars, is included in the leisure and hospitality sector. While the majority of restaurant and bar patrons are often local residents, a portion of customers are usually from outside of the state.³³ Foodservice employment experienced a modest year-over-year increase of 4 percent, while wages and taxable sales experienced a 10 percent increase (see Table 10). In 2015, Utah's private foodservice industry provided 92,747 average annual jobs (does not include proprietors) and \$1.4 billion in employee wages.

Summary

Utah's diverse and seasonal travel and tourism industry has experienced steady growth over the past five years. Increased numbers of travelers, spanning a variety of ages and origins, continue to visit Utah's ski resorts, parks and other natural, cultural and historic attractions in record numbers.

Utah's economy welcomed another year of record-setting traveler spending (\$8.17 billion) and associated state and local tax revenues (\$1.15 billion). Total employment generated by traveler spending increased 12 percent over the past five years and 4 percent over the past year. Wages from those jobs increased at an even greater rate, with a 20 percent increase since 2011 and an 8 percent increase since 2014. On a regional and county basis, the share of private leisure and hospitality

jobs to total private jobs was largest in Utah's Canyon Country, North Mountains and Dixie travel regions, and, more specifically, in Garfield, Daggett and Grand counties. From 2011 to 2015, all Utah travel regions except for the Central Utah travel region, experienced at least 11 percent year-over-year employment growth in the private leisure and hospitality sector.

Utah's 14 ski resorts and its five national parks set all-time records in 2015 with 4.5 million recorded skier days and 8.4 million national park recreation visits. National places and state parks also experienced year-over-year visitation increases (5 percent and 16 percent, respectively), while convention, meeting and trade show attendance (300,000 out-of-town attendees) once again reached record levels. Increased leisure and business visitation led to increased visitor spending, which generated additional tax revenue and supported 142,500 jobs and \$4.3 billion in wages.

As for travel and tourism industry performance in 2015, the greatest year-over-year percent job growth occurred in the private charter bus industry (16 percent), the private travel arrangements and reservation services (9 percent) and the AER (5 percent) sectors. Foodservice added the most jobs from the previous year (3,938 jobs) with AER (2,092 jobs) and accommodations (528 jobs) in second and third. Year-over-year increases in total wages were greatest in the private charter bus industry (30 percent), followed by the private travel arrangements and reservation services (11 percent) and private foodservice (10 percent) sectors. Taxable sales in the amusement and recreation sector experienced the largest growth in the past year (up 21 percent), followed by RV park and camp sales (up 16 percent) and other traveler accommodations (up 12 percent).

Every type of travel-related sales tax revenue grew at least 2 percent from 2014 to 2015, which meant an additional \$11.4 million dollars in total travel-related sales tax revenue. Municipal transient room taxes experienced the largest year-over increase (12 percent), followed by county transient room taxes (10 percent) and resort communities' sales taxes (8 percent).

Looking ahead to 2017, USTA forecasts a 3 percent increase in domestic and international spending in the U.S., a 2 percent increase in domestic person-trips and a 2 to 4 percent increase in international visitation. The uncertainty surrounding the recent U.S. presidential election, sluggish global expansion, low inflation, the relative strength of the U.S. dollar and turbulent geopolitical conditions will continue to impact international visitor volume and overall business travel in 2017. Still, China and the Asia-Pacific region will remain one of the fastest growing U.S. travel markets in the coming years, meaning Utah will most likely continue to experience increased visitation from Chinese travelers. In the year ahead, it is estimated that Utah will experience a 3 percent increase in travel-generated jobs and wages, a 5 percent increase in travel-related sales and a 7 percent increase in travel-related sales tax revenues.

Utah's travel and tourism industry is an integral part of Utah's economy as it generates jobs and wages, directly and indirectly, and contributes to Utah's overall tax base. Travel-generated taxes not only help promote future tourism marketing and the maintenance of tourism facilities, but also help fund a variety of public services, including transportation, health and human services and education.

Appendix A—Endnotes

1. Includes indirect and induced effects.
2. Includes indirect and induced effects.
3. Wasatch Front travel region includes Davis, Salt Lake, Utah and Weber counties.
4. North Mountains travel region includes Cache, Morgan, Rich, Summit and Wasatch counties.
5. Eastern Utah travel region includes Carbon, Daggett, Duchesne, Emery, and Uintah counties.
6. Northwestern Utah travel region includes Box Elder and Tooele counties.
7. Central Utah travel region includes Beaver, Juab, Millard, Piute, Sanpete and Sevier counties.
8. Canyon Country travel region includes Garfield, Grand, Kane, San Juan, and Wayne counties.
9. Dixie travel region includes Iron and Washington counties.
10. U.S. Office of Energy Efficiency & Renewable Energy. (2016). *Average historical annual gasoline pump price, 1929-2015*. Retrieved from <https://energy.gov/eere/vehicles/fact-915-march-7-2016-average-historical-annual-gasoline-pump-price-1929-2015>
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12. Dave Williams, Utah Office of Tourism, personal communication, February 10, 2017.
13. Utah State Legislature. (2014).
14. Strategic Marketing and Research Insights. (2016). *2015-2016 winter advertising effectiveness wave 2 ROI*.
15. Strategic Marketing and Research Insights. (2016). *2016 three-season advertising effectiveness wave 2 ROI*.
16. Australia, Canada and the U.K. are Utah's largest international skiing/snowboarding markets.
17. Estimates are based on and extrapolated from aggregate depersonalized card usage data provided for the calendar years of 2014 and 2015 and include consumer Visa card accounts only.
18. Weights are based on the U.S. Bureau of Economic Analysis's Travel and Tourism Satellite Accounts' "tourist commodity ratios."
19. About 65 percent of all tourism-related employment in the state of Utah are included in the "leisure and hospitality" sector.
20. Arches, Bryce Canyon, Canyonlands and Capitol Reef National Parks are all in Canyon Country; Zion National Park is in Dixie.
21. The term "national places" includes federally designated and protected monuments, recreation areas and historic sites.
22. Cliff Doner, Visit Salt Lake, email message to author, February 2, 2017.
23. Ibid.
24. Includes estimated direct, indirect and induced tourism-related sales, property, corporate, income, fuel and all other tourism-related tax revenue sources and related fees.
25. The definition of Utah's "Use Tax" can be found at <http://www.tax.utah.gov/forms/pubs/pub-25.pdf>
26. In this report, tourism-related tax revenues include: tourism, recreation, culture, and convention facilities (TRCC) tax; resort communities' sales tax; transient room tax (county and municipality); zoo, arts parks (ZAP) sales tax; and statewide car rental tax.
27. Provo (PVU), St. George (SGU) and Wendover (ENV).
28. Canada, France, Mexico, Netherlands [seasonal] and England [May 2016].
29. It must be noted that domestic and international travelers also fly into Las Vegas on their way to explore southern Utah's national parks and monuments.
30. Federal fiscal year runs October 1 through September 30.
31. In 2011, the U.S. Bureau of Economic Analysis's Travel and Tourism Satellite Account program estimated that, on a national scale, 23 to 34 percent of purchases in the AER sector were attributed to travelers and tourists.
32. Public employment and wage data is included in this table to capture public park and museum jobs (e.g. national park jobs).
33. In 2011, the U.S. Bureau of Economic Analysis's Travel and Tourism Satellite Account program estimated that, on a national scale, 18 percent of purchases in the foodservice sector were attributed to travelers and tourists.

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