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An Economic Analysis of Utah's Direct Selling Industry

Utah's established direct selling industry anchored over 38,000 well-paying jobs and added significantly to state and local tax revenues as part of its 2020 statewide economic impacts.

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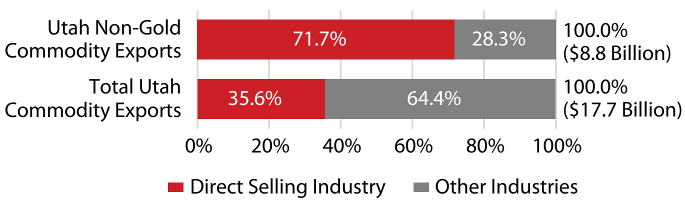
Analysis in Brief

Utah's established direct selling industry anchored over 38,000 well-paying jobs and added significantly to state and local tax revenues as part of its 2020 statewide economic impacts. Direct selling companies market and distribute products through independent sales representatives and their personal networks. Utah is a global hub for the direct selling business model. The industry comprises 91 direct selling companies and 66 key suppliers. Ten of these direct selling companies with Utah headquarters provided more than $10.3 billion in goods and services to their customers around the world, 6.1% of industry sales from all states and countries.

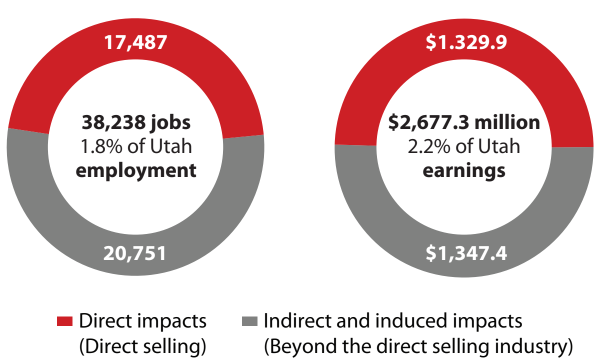
Exports from Utah Direct Selling Companies, 2020
(Share of Statewide Exports for 10 Direct Selling Companies, Which Reported a Combined $6.3 Billion in Exports)



Note: Commodities exclude services. Statewide gold exports were $8.9 billion. Trade data not available for 81 of Utah's 91 direct selling companies.

Source: Dorsey & Whitney LLP; U.S. Census Bureau, USA Trade Online

Economic Impacts of Utah's Direct Selling Industry, 2020



Note: Percentages equal Utah's total economic impacts from the direct selling industry divided by total statewide employment and earnings for all industries. Besides the in-state operations of direct selling companies and selected suppliers, 2020 impacts incorporate average annual economic activity from direct selling conventions held between 2015 and 2019.

Source: Kem C. Gardner Policy Institute analysis of data from the Utah Department of Workforce Services using REMI PI+ economic model

Key Findings

- **Economic Impacts**—The direct selling industry employed 17,487 Utah residents, and industry activity indirectly supported another 20,751 jobs.
- **High Wages**—At $63,652 per employee, direct selling companies paid their Utah employees an average of 18.4% more than companies in other industries in 2020.
- **Exports**—International sales of $6.3 billion from selected direct selling companies in Utah made up 71.7% of the state's non-gold commodity exports in 2020.
- **Entrepreneurship**—In 2020, 10 large direct selling companies had 21,457 independent sales representatives in Utah, predominantly women. Their median self-employment earnings (before expenses) ranged from $70 to $3,000 per year.
- **Business Travelers**—Out-of-state visitors who attended direct selling conventions in Utah spent an estimated $41.6 million annually from 2015 to 2019.

Largest Utah Employers in Direct Selling Industry, 2020
(Companies with at Least 100 Employees)

100 to 249 Jobs	250 to 749 Jobs	750 Jobs or More
ASEA Global	4Life Research	doTERRA
LifeVantage	Aptive Environmental	Nu Skin
Modere	Blue Raven Solar	USANA Health Sci.
Plunder Design	Nature's Sunshine	Young Living
SupraNaturals	NewAge	
Thrive Life	Paparazzi Accessories	
Unicity International	Stampin' Up	
Xyngular	Younique	
Zyia Active		

Note: Disclosure limitations prevent the reporting of exact employment counts by company. In addition, Utah employment at direct selling companies does not include independent sales representatives.

Source: Utah Department of Workforce Services, FirmFind

Section 1: Utah Economic Impacts

A few metrics outline the direct selling industry's economic footprint in Utah. In 2020, direct selling companies and suppliers with headquarters and other offices in the state provided 17,487 jobs (see Table 1).[1] Economy-wide impacts from the spending of direct selling companies and their suppliers and workers included $2.7 billion in earnings, 2.2% of the state total for all residents, and $182.8 million in annual state and local tax revenue. Of 91 direct selling companies, 10 responded to a survey for this study and indicated they collectively provide a self-employment opportunity for more than 21,000 independent sales representatives in Utah.[2] Before the COVID-19 pandemic, out-of-state visitors spent an estimated $41.6 million per year while attending direct selling conventions in Utah. Section 6 lists companies included in the direct selling industry definition for Utah.

What is Direct Selling?

Direct selling is unique among retail channels because of the way in which products and services are marketed to customers. Instead of relying on traditional retail outlets or online marketplaces, direct selling companies maintain a sales force of independent entrepreneurs. Companies market a wide variety of goods and services, such as nutritional supplements, essential oils, cosmetics, sportswear, jewelry, cookware, housewares, energy, and insurance. Sales representatives of direct selling companies may market products or services through one-to-one communication, in-home demonstrations, or social media sharing. With U.S. roots in the late nineteenth century, the industry now serves markets around the world.[6]

Statewide Economic Impacts: Over 38,000 Jobs Connected to Direct Selling Industry

In 2020, direct selling companies generated 38,238 Utah jobs and $2.7 billion in statewide earnings (see Figure 1). This significant economic activity constituted 1.8% of Utah employment in all sectors and 2.2% of its residents' earnings.

Direct impacts within the direct selling industry were 17,487 jobs and $1.3 billion in earnings.[3] As indirect and induced effects rippled through interconnected industries and populations, each direct selling job supported another 1.2 Utah jobs on average, which added 20,751 jobs to the industry's employment impacts. Retail made up nearly one-fourth of direct selling total employment impacts, followed by manufacturing, construction and business services (see Figure 2).[4] In each of 13 Utah industries, at least 1,000 jobs came from direct selling activity in the state.

The economic impacts in this section are based on Utah employment and wages generated by 157 companies in the direct selling industry in 2020. Section 2 provides an analysis of 91 direct selling companies and 66 direct selling suppliers. Direct impacts for this analysis also include estimates of spending by visitors who attended direct selling conventions, which were based on historical averages since pandemic measures limited in-person meetings in 2020 (see Section 5). One element of the indirect and induced effects Gardner Institute researchers modeled is the income earned by independent sales representatives for companies surveyed in this study.[5]

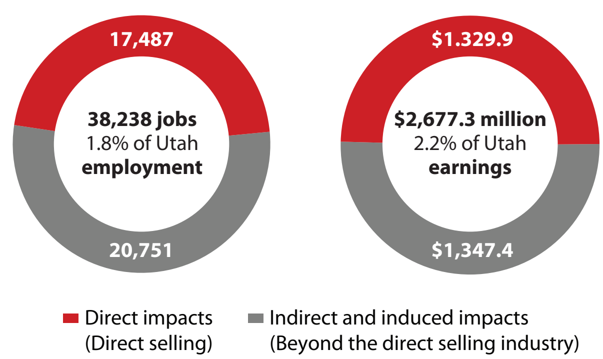
Table 1: Utah Direct Selling Industry Components, 2020

Component	Companies	Employment (Jobs)
Direct Selling Companies	91	11,678
Selected Suppliers	66	5,312
Convention Visitation	NA	497
Total	**157**	**17,487**

Note: Of 91 direct selling companies, 10 firms with 6,143 jobs participated in a detailed survey for this study. Employment at direct selling companies does not include independent sales representatives. Direct selling companies have many suppliers besides the 66 within the industry. Economic modeling provides employment estimates but not company counts for in-state business activity from the spending of out-of-state visitors to Utah direct selling conventions.

Source: Kem C. Gardner Policy Institute industry definition with input from the Utah Direct Selling Coalition and Dorsey & Whitney LLP

Figure 1: Economic Impacts of Utah's Direct Selling Industry, 2020

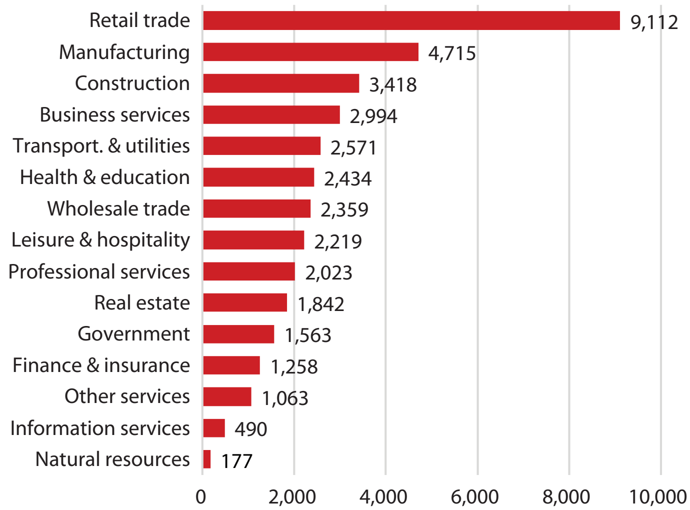


Note: Percentages equal Utah's total economic impacts from the direct selling industry divided by total statewide employment and earnings for all industries. Besides the in-state operations of direct selling companies and selected suppliers, 2020 impacts incorporate average annual economic activity from direct selling conventions held between 2015 and 2019.

Source: Kem C. Gardner Policy Institute analysis of data from the Utah Department of Workforce Services using REMI PI+ economic model

Figure 2: Utah Direct Selling Economic Impacts by Sector, 2020

(Jobs Generated by the Direct Selling Industry)



Note: Total employment impact of 38,238 jobs includes direct selling companies, selected suppliers and in-state industry conventions (17,487 jobs), as well as indirect and induced impacts outside the direct selling industry (20,751 jobs).

Source: Kem C. Gardner Policy Institute analysis of data from the Utah Department of Workforce Services using REMI PI+ economic model

Economic Impact Terms

Employment is a measure of the average number of full-time and part-time jobs held by employees and self-employed workers. Companies report their employment to the Utah Department of Workforce Services by place of work, not by place of residence.

Wages represent the amount companies pay their employees on an hourly or salary basis. Employee benefits and self-employment income are not included in wages; these forms of worker income are part of personal income.

Earnings consist of employee compensation and proprietors' income from self-employment. Employee compensation is the sum of wage and salary disbursements, and supplements to wages and salaries (employee benefits).

Economic impacts refer to the economic activity in a geographic region generated by a given source—in this case, the direct selling industry. The Gardner Institute estimated four components: direct impacts, which involve employee compensation and other spending by companies in Utah's direct selling industry; indirect impacts, which include the relevant portion of spending at companies that provide inputs to companies in the direct selling industry; induced impacts, which include the household spending of direct selling industry employees and the relevant portion of spending by workers at companies that are part of the indirect impacts; and fiscal impacts, which include tax revenue and government expenditures associated with the combined direct, indirect, and induced impacts.

Table 2: Utah Direct Selling Industry State and Local Fiscal Impacts, 2020

(Millions of Dollars)

Category	State	Local	Total
Tax revenues	$127.1	$64.3	$191.4
Government operating expenditures	$38.1	$8.5	$46.6
Net state and local revenue	**$89.0**	**$55.8**	**$144.7**

Note: Totals may not match exactly due to rounding. These impacts include total revenues and operating expenditures from Tables 2 and 3.

Source: Kem C. Gardner Policy Institute fiscal impact modelling

Table 3: Direct Selling State Fiscal Impacts in Utah, 2020

(Millions of Dollars)

Impact	Amount
Sales tax revenues	$57.2
Personal income tax revenues	$58.8
Corporate income tax revenues	$11.1
Total State Revenues	**$127.1**
Non-Education expenditures	$13.4
Public education expenditures	$13.7
Higher education expenditures	$11.0
Total state operating expenditures	**$38.1**
Net state revenue	**$89.0**

Note: Totals may not match exactly due to rounding.

Source: Kem C. Gardner Policy Institute fiscal impact modeling

Fiscal Impacts: Direct Selling Companies Generate $191.4 Million in State and Local Tax Revenue

Taxable economic activity connected to direct selling companies helps fund state and local governments, including schools. The Gardner Institute estimated government revenues generated by the direct selling industry's economic impacts in Utah; in 2020, government entities received an estimated $191.4 million in tax revenues from the economic activity associated with the 38,238 jobs that the industry created or indirectly sustained (see Table 2).[7] These revenues far exceeded government expenses, estimated at $46.6 million, for services to residents whose jobs depended on direct selling companies. The net fiscal impact was a $144.7 million annual flow.

At the state level, 2020 net tax revenue from direct selling industry activity in Utah was $89.0 million (see Table 3). An estimated 91.3% of $127.1 million in state revenue came from sales ($57.2 million) and personal income taxes ($58.8 million). Those who paid these taxes included direct selling employees, independent sales representatives and workers in other industries supported by the direct selling industry. The remaining 8.7% ($11.1 million) of state revenue came from corporate income taxes paid by direct selling companies and other companies that were part of the industry's indirect and induced impacts.

Government expenditures fund services for the population of adults and children who live in Utah because of work opportunities that direct selling companies generate. Public and higher education expenditures reached a combined total of $24.7 million, which was nearly two-thirds of total state operating expenditures related to the direct selling industry in 2020. Non-education expenditures, on the other hand, amounted to $13.4 million.

As for local governments, the net fiscal impact of Utah's direct selling industry was $55.8 million in 2020 (see Table 4). This included an estimated $64.3 million in tax revenues and $8.5 million in operating expenditures for counties and school districts. Most local tax revenues came from property taxes, which amounted to $53.9 million. The local portion of sales tax collections was $10.3 million. As for local government expenditures, public K–12 education spending were an estimated $5.1 million, and other county expenditures amounted to $3.4 million.

Table 4: Direct Selling Local Fiscal Impacts in Utah, 2020
(Millions of Dollars)

Impact	Amount
Property tax revenues	$53.9
Sales tax revenues	$10.3
Total local revenues	**$64.3**
Non-Education expenditures	$3.4
Public education expenditures	$5.1
Total local operating expenditures	**$8.5**
Net local revenue	**$55.8**

Note: Totals may not match exactly due to rounding. Local revenues and operating expenditures include counties and school districts. Cities and towns are not included.

Source: Kem C. Gardner Policy Institute fiscal impact modeling

Section 2: Industry Employment and Wages

The direct selling industry provided 17,487 Utah jobs in 2020, with an average wage ($63,652) above the state's average (53,891). In 2020, direct selling companies staffed 11,678 jobs at large and small businesses.[8] Suppliers to these companies include manufacturers and service providers in and beyond the industry's center in Utah County and Salt Lake County. Selected suppliers provided 5,312 additional jobs. Besides employment at direct selling companies and selected suppliers, visitor spending from direct selling conventions accounts for nearly 497 jobs in the industry. Utah industries with employment levels similar to the direct selling industry include agriculture, accommodation, military and publishing (see Figure 3). Section 6 describes the direct selling industry definition and identifies the companies included.

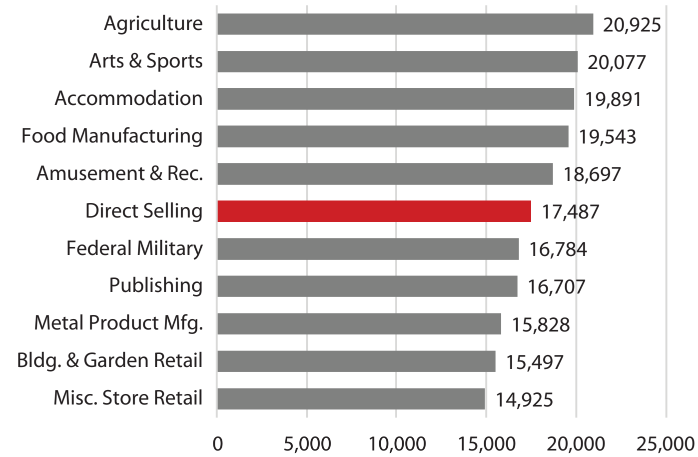
In 2020, 91 direct selling companies and 66 suppliers directly provided 16,990 Utah jobs and paid employees $1,081.5 million annually.[9] The average wage per job was $63,652 industry-wide, which was 18.4% above the statewide average of $53,782 for all other industries (see Figure 4). Compensation at Utah direct selling companies and suppliers also included employer benefits estimated at $13,766 per job, on average. Wages and benefits add to $77,418 per job and total compensation of $1,315.3 million for all employees in the industry. These wage data do not reflect employment for direct selling conventions.

Direct Selling Company Segmentation by Product and Employment

Among the goods and services that Utah direct selling companies provide, the "health and wellness" segment is the most dominant. In the five-category classification system shown in Figure 5, 56% of Utah direct selling companies have health and wellness offerings, which include things such as vitamins, nutritional supplements and weight-loss products. The second-largest segment, "beauty and fashion," represents 20% of companies and includes skin care, hair care and apparel products. The share of companies providing "services" or "essential oils" are 10% and 7%, respectively. Services include financial services, pest control and cyber risk management. "Food and beverage" companies and other tangible product sellers round out the industry. "Other products" includes solar panels and windows, home organization and décor items, technology devices, cleaning products, craft supplies, and stationery. Of the 91 total companies, nine participate in two or more segments.

In 2020, 91 direct selling companies provided 11,678 Utah jobs and paid their employees a cumulative $802.6 million annually. At direct selling companies (not including suppliers in the industry), the average wage per job was $68,727, which

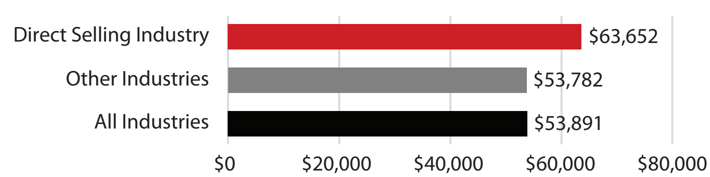
Figure 3: Direct Selling and Industries With Similar Employment, 2020
(Utah Jobs)



Note: Includes industries within 3,500 jobs of direct selling, ranking from 36th to 46th by employment among 92 disaggregated industries. Agriculture includes crop and animal activity, but not support activities for agriculture. Arts and sports include performing arts, spectator sports, and related industries. The publishing industry includes print formats and software, but not internet publishing. Metal product manufacturing involves fabricated products, not primary metals. The building and garden industry includes building material and garden equipment and supplies. Miscellaneous retail includes brick-and-mortar florists; office supplies, stationery and gift stores; used merchandise; pet supplies; art dealers; and manufactured home dealers.

Source: U.S. Bureau of Economic Analysis, Interactive Data Table SAEMP25N Total Full-Time and Part-Time Employment by NAICS Industry

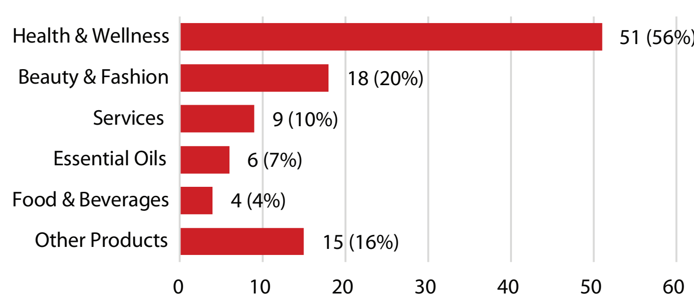
Figure 4: Average Annual Wages per Employee, 2020



Note: Employee wages do not include benefits or income from self-employment.

Source: Utah Department of Workforce Services, information request

Figure 5: Utah Direct Selling Companies by Segment, 2020
(Number of Companies; Share of 91 Companies)



Note: Other products include home improvement, household, craft, and other tangible goods. Shares add to more than 100% because nine of these companies belong in two or more categories.

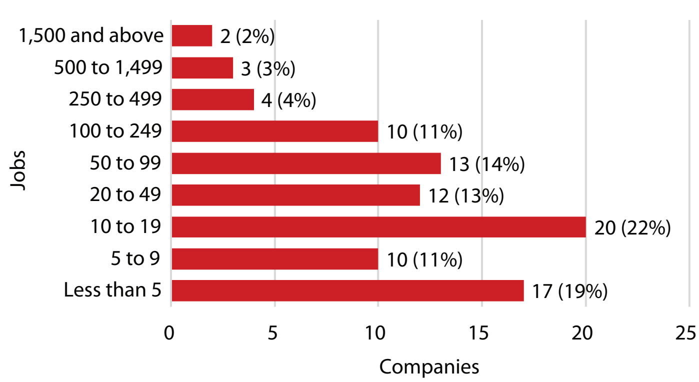
Source: Kem C. Gardner Policy Institute analysis of data from Dorsey & Whitney LLP was 27.8% above the statewide average of $53,778 for all other companies. Compensation at Utah direct selling companies also included employer benefits estimated at $13,766 per job, on average. Wages and benefits added to $77,418 per job and total compensation of $963.2 million for all direct selling company employees.

Utah's direct selling companies vary significantly in size (see Figure 6). In 2020, nearly one-fifth (17 of 91 companies) were small businesses with fewer than five employees, and 79% of the industry (72 companies) had fewer than 100 employees. The five largest direct sellers in Utah each provided at least 500 jobs.

Principal Utah employers in the direct selling industry include 21 direct selling companies with at least 100 employees (see Table 5). The companies were founded between 1972 and 2017. In 2020, nine of them provided 100 to 249 in-state jobs. The largest two employers, doTERRA and Young Living, each provided more than 1,500 jobs, and the three companies rounding out the top five were Nu Skin, USANA Health Sciences, and Nature's Sunshine. Note that the Utah Department of Workforce Services does not release exact employment for individual companies.

Most of Utah's direct selling companies identify as retail or wholesale trade companies (see Figure 7). In 2020, half of the industry's employment, 5,953 jobs, was in the retail trade sector—commonly classified as nonstore retailers, although a portion was in e-commerce or miscellaneous retail sales.[10] On the other hand, over one-tenth of industry employment came from companies in wholesale trade––primarily classified as pharmaceutical, which includes vitamins, other nutraceuticals and certain cosmetic products. Besides retail and wholesale trade, most of the remaining employment at direct selling companies was either

Figure 6: Utah Direct Selling Companies by Size, 2020
(Companies Grouped by Number of Jobs)



Note: Employment at direct selling companies does not include independent sales representatives (direct sellers). The category "20 to 49" includes Activz, which has 21 to 53 employees. Additionally, seven larger companies may belong in either of two employment ranges: Nature's Sunshine, Aptive Environmental, Blue Raven Solar, NewAge, 4Life Research USA , Stampin' Up, and Younique (see Table 5 for their employment).

Source: Utah Department of Workforce Services, FIrmFind

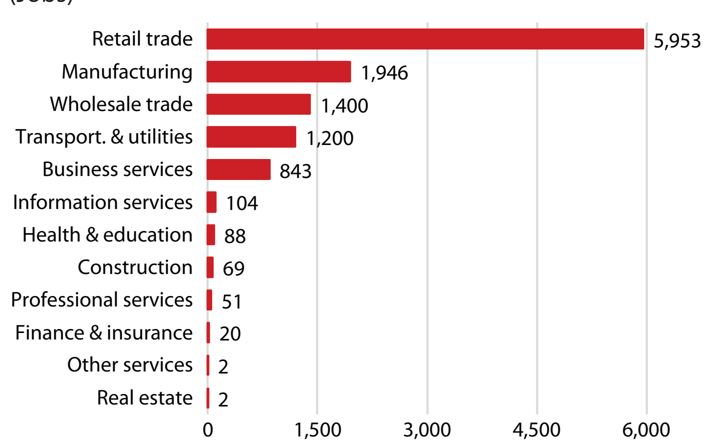
Table 5: Utah's Largest Employers Among Direct Selling Companies, 2020
(Companies with at Least 100 Employees)

Company	Jobs[1]	Year Established[2]
doTERRA	2,265 to 3,526	2008
Young Living	1,505 to 3,007	1993
Nu Skin	606 to 1,260	1984
USANA Health Sciences	520 to 1,048	1992
Nature's Sunshine	370 to 797	1972
Stampin' Up	300 to 598	1988
Younique	300 to 598	2012
Aptive Environmental	270 to 548	2015
Paparazzi Accessories	250 to 499	2011
4Life Research USA	205 to 405	1998
Blue Raven Solar	170 to 397	2014
NewAge[3]	161 to 371	2016
ASEA Global	100 to 249	2010
LifeVantage	100 to 249	2003
Modere	100 to 249	1987
Plunder Design	100 to 249	2014
SupraNaturals	100 to 249	2004
Thrive Life	100 to 249	2005
Unicity International	100 to 249	2005
Xyngular	100 to 249	2009
Zyia Active	100 to 249	2017

Note:
1. Disclosure limitations prevent the reporting of exact employment counts by company. In addition, Utah employment at direct selling companies does not include independent sales representatives (direct sellers).
2. Companies have reorganized and renamed themselves over the years. Some had significant precursors before the founding year given.
3. In July 2020, NewAge acquired ARIIX, which accounts for 50 to 99 of the jobs at NewAge.

Source: Utah Department of Workforce Services and company websites

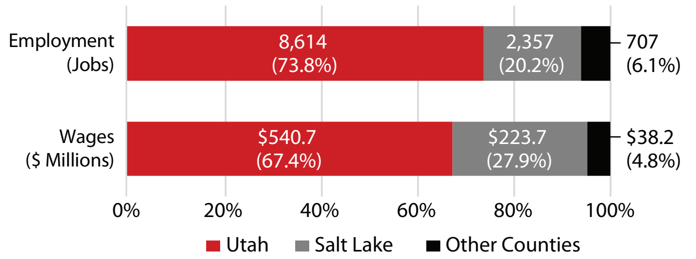
Figure 7: Utah Direct Selling Company Employment by Sector, 2020
(Jobs)



Note: Employment does not include suppliers to direct selling companies or industry conventions. Sectors follow the North American Industry Classification System (NAICS). Other industries include natural resources, real estate and other services.

Source: Utah Department of Workforce Services, information request

Figure 8: Direct Selling Company Employment and Wages by County, 2020



Note: Other counties include Davis, Washington, Duchesne, Kane, Tooele and Weber, each with one to four direct selling establishments. Disclosure limitations prevent the reporting of exact employment counts for these counties. Totals are 11,678 jobs and $802.6 million in wages.

Source: Utah Department of Workforce Services, FirmFind and information request

in manufacturing (1,946 jobs primarily under pharmaceutical manufacturing), transportation and utilities (1,200 jobs primarily under warehousing and storage), or business services (843 jobs primarily under pest control or telemarketing).

Direct selling companies are located in five counties, with a noticeable concentration in Utah County. Several of these 91 companies may have multiple establishments, which are commonly located at different addresses from their respective company headquarters. Of 114 in-state direct selling establishments operating in 2020, 55% were in Utah County, 34% were in Salt Lake County, and the remaining 11% were in Washington, Davis, Kane, Weber and Duchesne counties.

Based on average employment, Utah County's 63 direct selling establishments were larger than those in other counties. While direct selling headquarters and other establishments coalesce in the Wasatch Front, their Utah suppliers and the companies sustained by the industry's economic impacts are more widely distributed across the state. Over 8,600 direct selling jobs were in Utah County, nearly three-fourths (73.8%) of the industry's statewide total (see Figure 8). Salt Lake County was home to more than 2,350 direct selling jobs, and the remaining 707 jobs were in Washington, Davis, Kane, Weber and Duchesne counties.

More than two-thirds of the statewide employee wages from direct selling companies, or $540.7 million, went to people working in Utah County. Salt Lake County followed with wages of $223.7 million from direct selling companies, 27.9% of the state's total, which was well above its 20.2% share of employment and reflected relatively well-paying jobs. Finally, companies in Washington, Davis, Kane, Weber and Duchesne counties paid a cumulative $38.2 million to direct selling company employees, 6.1% of the statewide total.

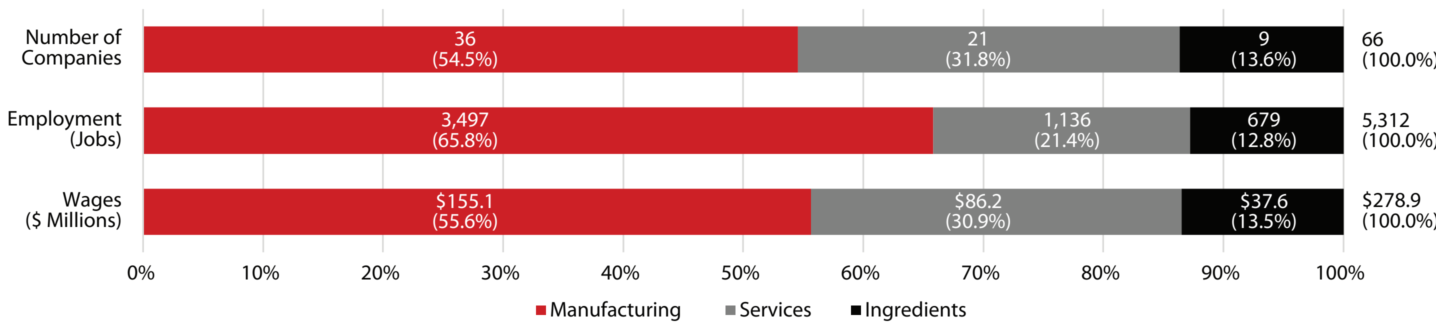
Suppliers Include Utah Manufacturers and Service Providers in Eight Counties

A large number of Utah workers and companies earn income by supplying inputs to direct selling companies. The Gardner Institute analyzed the employment, wages and locations of 66 noteworthy suppliers in eight counties.[11] The firm Dorsey & Whitney selected these in-state suppliers from Utah's direct sales industry by compiling and corroborating responses from individuals in the industry. The guiding principle for inclusion was that a company's primary line of business be supplying inputs to direct selling companies. This list of suppliers is not intended to be comprehensive of all Utah suppliers that make large or small, occasional or frequent sales to Utah's direct selling companies.[12] See Section 6 for further details.

The 66 Utah suppliers to direct selling companies identified for this study are manufacturers, service providers or ingredient suppliers (see Figure 9).[13] Manufacturers for direct selling companies provided 3,497 Utah jobs in 2020, nearly two-thirds of the supplier total of 5,312 full-time and part-time jobs. In the same year, service providers paid $86.2 million in wages, nearly one-third of the supplier total. Companies that provided ingredients to direct selling companies accounted for 12.8% to 13.6% of suppliers' company count, employment and wages.

In 2020, the 66 selected suppliers in the direct selling industry paid employees an aggregate $278.9 million annually. Among these suppliers (not including direct selling companies in the industry), the average wage per job was $52,497, which was within 3% of the average of $53,896 for all other employment in the state. Compensation at Utah direct selling suppliers also included employer benefits estimated at $13,801 per job, on average. Wages and benefits added to $66,298 per job and $352.2 million in total compensation for supplier employees.

Figure 9: Employment and Wages of Selected Direct Selling Suppliers by Type, 2020



Source: Utah Department of Workforce Services, FirmFind and information request

Supplier activity in the direct selling industry is more evenly distributed statewide than direct selling companies themselves. While nearly nine out of 10 direct selling establishments were in the industry's two leading counties, Utah County and Salt Lake County, only 69% of supplier establishments were located there in 2020 (see Table 6). Three other counties, Weber, Davis and Washington, were home to multiple suppliers to direct selling companies. Additionally, at least one supplier operated in Cache, Emery and Millard counties, which feature large rural areas.

Table 6: Selected Utah Suppliers to Direct Selling Companies by County, 2020

County	Establishments	Share of Total
Utah	26	36.6%
Salt Lake	23	32.4%
Weber	9	12.7%
Davis	7	9.9%
Washington	3	4.2%
Cache	1	1.4%
Emery	1	1.4%
Millard	1	1.4%
State Total	**71**	**100.0%**

Note: These 71 Utah establishments represent 66 companies, three of which had two or more business locations within the same county, and one had two or more business locations in different counties.

Source: Dorsey & Whitney LLP and Utah Department of Workforce Services

Section 3: Sales at Home and Abroad

Exceptional levels of in-state production for domestic and international markets marked Utah's role in the direct selling industry. Utah, a state with under 0.1% of the world's population, provided more than 6% of the industry's global sales in 2020. While Utah produces just under 1% of U.S. GDP, it provided at least 10% of direct selling products bought nationwide. At the same time, in-state purchases in Utah exceeded the national average of sales per capita.

A 2021 industry survey of several large companies headquartered in Utah informs Sections 3 and 4. The survey supplements a state government dataset on the full set of companies addressed in Sections 1 and 2, as well as previously published findings from national surveys of direct selling companies. The firm Dorsey & Whitney collected detailed information on sales and sales representatives from 10 of the 91 direct selling Utah companies.[14] The surveyed companies operated in one or more industry segments: health and wellness (10 companies), beauty and fashion (four), and other products (one).[15] These companies provided more than half (57.5%) of industry employment statewide in 2020, and their 6,143 employee jobs paid $410.2 million in annual wages. Due to their importance in the Utah, national and international direct selling landscape, parts of Section 3 and 4 reference survey results from companies' sales and sales representatives.

State Comparisons: Utah Provides More Direct Selling Products Than It Consumes

Utah is a significant market for the retail activity of direct selling companies headquartered either within or outside Utah. State comparisons suggest Utah consumers have a moderately high affinity for direct selling products and networks. In 2020, Utah ranked ninth in terms of direct sales per capita.[16] At $215 per adult living in the state, Utah spending exceeded the $155 U.S. average. The nationwide Direct Selling Association, which represents the industry, surveyed a sample of direct selling companies and estimated that there were $498.8 million in Utah retail purchases in 2020.[17]

Besides being a market for direct sellers, Utah is an established industry hub, and a significant portion of the $40.1 billion in 2020 direct selling nationwide originated in the state.[18] Utah's nationwide direct product sales far exceed those from within the state. While Utah consumers accounted for 1.2% of U.S. retail sales in the industry, Utah direct selling companies provided over 10.0% of direct selling nationwide.[19]

Sales From Utah Direct Selling Companies Exceed $10 Billion, Mostly International Exports

Ten large Utah direct selling companies surveyed reported a total of $10.3 billion in global sales during 2020, 3.0% of total industry sales from Utah (see Table 7).[20] From a state with 0.04% of the world's population, these companies represented 6.1% of the industry's global sales of $168.3 billion.[21] Including all companies in the industry, not just the 10 survey participants, Utah direct selling companies generated substantially more than 3.0% of statewide sales in all industries combined, and more than 6.1% of global sales in the direct selling industry itself.[22] Of total sales from the 10 companies surveyed, most were international exports: 61.1% or $6.3 billion. In 2020, these direct selling exports represented 35.6% of Utah's total international exports of $17.7 billion in commodities (see Figure 10).[23] Direct selling companies accounted for 71.7% of Utah's $8.8 billion in non-gold commodity exports. The remaining 38.9% of the selected companies' global sales, $4.0 billion, were domestic sales in Utah and other states. Total sales ranged from $0.2 billion to $2.6 billion for individual companies, and their international shares ranged from 13.3% to 90.6% of total sales. The extent of out-of-state distribution from this Utah

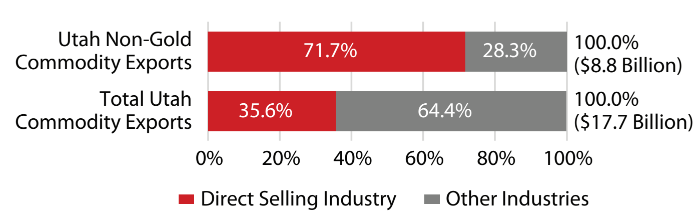
Table 7: Sales by Destination for Selected Utah Direct Selling Companies, 2020
(Billions of Dollars)

Destination	Sales	Share
Domestic (U.S.)	$4.0	38.9%
International (Exports)	$6.3	61.1%
Total	**$10.3**	**100.0%**

Note: Data aggregated from the survey responses of 10 companies headquartered in Utah.

Source: Dorsey & Whitney LLP, 2021 direct selling industry survey

Figure 10: Exports from Utah Direct Selling Companies, 2020
(Share of Statewide Exports for 10 Direct Selling Companies, Which Reported a Combined $6.3 Billion in Exports)



Note: Commodities exclude services. Statewide gold exports were $8.9 billion. Trade data not available for 81 of Utah's 91 direct selling companies.

Source: Dorsey & Whitney LLP; U.S. Census Bureau, USA Trade Online industry brings substantial income and employment into the state. In contrast, in-state sales do not add significant economic impacts, although they are associated with economic activity because resources are used and recirculated within the state.

The $4.0 billion in direct selling from these Utah companies made up 10.0% of the estimated $40.1 billion in domestic sales from all companies in the U.S. industry.[24] By the comparison, the state's share of nationwide GDP across all industries is just under 1%. This percentage understates Utah's outsized participation in the industry by all Utah direct selling companies. For example, the 10 companies made up only 57.5% of total employment at all 91 direct selling companies included in this report.

Section 4: Sales Representatives

The direct selling industry's network of independent contractors connect with consumers and support product distribution. These self-employed sales representatives are more common in Utah than most other states. Typical incomes, which vary widely by company and individual, are below $10,000. People involved in direct selling in the U.S. are disproportionately female, White, and Hispanic or Latino. Many of these entrepreneurs fall within demographic cross-sections with below-average incomes, rates of business ownership, and labor-force participation. As of 2020, nearly 230,000 non-employee sales representatives and discount buyers in Utah were involved with direct selling companies. Worldwide, direct selling companies headquartered in Utah had at least 4.9 million independent sales representatives.

Direct Selling Terms

People involved in direct selling include sales representatives and discount buyers, each defined below. This nomenclature for industry participants who are not employees follows the conventions of the Direct Selling Association (DSA), a nationwide industry advocate and trade association.

Sales representatives are people who create a business selling consumer goods or services, either alone or with their team. They are independent contractors, not employees of direct selling companies. Sales representatives may also be called direct sellers, affiliates, participants, distributors, or consultants.

Discount buyers or *preferred customers* are the terms the industry uses to describe customers who purchase products and services at a discount and do not participate in the business opportunity. Discount buyers have signed an agreement that makes them eligible to sell to consumers and sponsor team members. In their responses to DSA's Growth and Outlook Survey, companies often do not distinguish between active sales representatives and discount buyers eligible to sell who have $0 in current-year sales.[25] For example, just under one-third of sales representatives who are independent contractors for a large Utah company documented any sales in 2020.

Employees at direct selling companies are counted separately from self-employed sales representatives or other people involved in direct selling. Sections 1 and 2 provide employment measures for the direct selling industry.

People Involved in Direct Selling: Nearly 230,000 Sales Representatives and Discount Buyers in Utah

Direct selling companies provide opportunities for self-employed independent contractors throughout the state. In 2020, besides direct selling employees, an estimated 229,797 people in Utah participated in the industry as sales representatives (independent contractors operating their own businesses) or discount buyers (preferred customers who do not make sales), together 9.9% of the adult population reported by the U.S. Census Bureau (Direct Selling Association, 2021b). Utah's share was well above the national average of 6.5%, and Utah ranks ninth among all states and DC in this regard.[26]

Several large companies headquartered in Utah responded to a 2021 industry survey conducted for this study. According to responses, nine Utah direct selling companies created entrepreneurship opportunities for 21,457 in-state sales representatives in 2020 (see Table 8), 9.3% of the estimated statewide total of 229,797 sales representatives and discount buyers.[27] One company had at least one sales representative in every county of the state, and more than 100 jobs for sales representatives in six Utah counties.[28]

The vast majority of independent sales representatives who contract with Utah direct selling companies surveyed lived and worked outside the state. In 2020, nearly 4.9 million sales representatives were affiliated with nine large Utah companies that responded to an industry survey.[29] Three-fourths of these independent direct sellers were outside the U.S., 3.7 million; one-fourth were in the U.S., 1.2 million sales representatives. Less than 1% of the global sales force lived and worked in Utah.

Table 8: Sales Representatives for Selected Utah Direct Selling Companies, 2020

Location	Independent Sales Representatives	Share
Utah	21,457	0.4%
Other States	1,195,861	24.6%
International	3,634,667	74.9%
Total	**4,851,985**	**100.0%**

Note: Sales representatives are independent contractors who are self-employed. Data represents nine companies with a combined $7.9 billion in global sales. One company provided Utah and U.S. counts without information on any international sales representatives the company may have had.

Source: Dorsey & Whitney LLP, 2021 direct selling industry survey

Self-Employment Income as Independent Sales Representatives Varies

Six Utah direct selling companies with a combined $4.9 billion in global sales reported the income earned by their in-state sales representatives.[30] In 2020, their 15,322 sales representatives earned a collective $94.8 million in documented commissions and related income. The mean of annual earnings from direct selling (before expenses) was $6,186 per representative, and company-specific means ranged from $574 to $10,650 per representative.[31] Naturally, top performers influenced these means: company medians for their sales representatives' annual earnings ranged from $70 to $3,000 before expenses. Companies' income disclosure statements provide further details.[32]

A prior nationwide survey noted direct selling income variability, with 7% of sales representatives reaching cumulative profits above $10,000, and 47% losing money by their participation over the years before 2017, after subtracting expenses.[33] In a position as flexible as that of an independent contractor, the time and effort they devote to selling varies widely by sales representative. Moreover, many sales representatives purchase products primarily for personal use rather than developing their networks and promoting the goods and services of direct selling companies.

Direct Seller Demographics: Nationwide Participation Among Women and Racial and Ethnic Groups

Direct selling companies offer flexible entrepreneurial opportunities that attract independent sales representatives from broad Utah demographic groups, including those with low incomes and below-average rates of business ownership and labor-force participation.[34] Nationwide, people involved with direct selling in 2020 were disproportionately female, White, or Hispanic or Latino.[35] Women's strong position in direct selling is significant because on average, median income for women in the state was 57% lower than for men from 2015 to 2019. Apart from direct selling companies' employees, people involved in direct selling include independent sales representatives and discount buyers in the U.S.[36] Separate Utah demographic data for the industry is lacking for the 229,797 people involved in direct selling in the state.

In 2020, U.S. women were much more likely than men to be involved with direct selling and accounted for 75% of the group, well above women's business ownership rates in other industries (see Table 9).[37] Direct selling companies created entrepreneurial opportunities for women in Utah, and their labor-force participation rate of 62.1% was 17.2 percentage points below men's from 2015 to 2019.[38] This direct selling gender dynamic favoring women was similar in 2015, but likely less pronounced historically.[39] Furthermore, it is not uncommon for women to fill prominent roles in Utah's direct selling industry.

Table 9: Demographics of People Involved in Direct Selling, 2020

(Share of All Sales Representatives and Discount Buyers)

	Direct Selling[1]	Adult Population	
Group	**U.S.**	**U.S.**	**Utah**
Sex			
Women	75%	51%	50%
Men	25%	49%	50%
Race[3]			
Black or African American	8%	12%	1%
Asian	3%	6%	3%
Native Hawaiian or Other Pacific Islander[5]	1%	0%	1%
White	87%	64%	80%
Some Other Race[4]	2%	9%	8%
Two or More Races[3]	NA	9%	7%
Ethnicity			
Hispanic or Latino	22%	17%	17%
Some Other Ethnicity	78%	83%	83%

Note:
1. Direct selling estimates for Utah are not available.
2. Race comparisons with the U.S. population are tentative. Direct selling companies responded to the Growth & Outlook Survey that assigned multiracial individuals to a single race group. In contrast, the Census Bureau uses a "Two or More Races" category based on how people self-identify, and its other adult population shares constitute single-race groups.
3. "Some Other Race" in the Growth & Outlook Survey combines responses of "American Indian and Alaska Native," "Not Identified," and "Other (please describe)." The adult population numbers shown here include American Indians and Alaska Natives.
4. U.S. adult population share for Native Hawaiian or Other Pacific Islander rounds down from 0.2% to 0%.

Source: Direct Selling Association, 2021 Growth & Outlook Survey; U.S. Census Bureau, 2020 Decennial Census Redistricting Data and 2020 American Community Survey, Integrated Public Use Microdata Series

Of 19 direct selling companies with at least 100 Utah employees in 2020, five companies were women-led, and women were among the founders of at least eight. The direct selling industry includes pervasive and prominent examples of female business owners and leaders, balancing gender equity in a state where women solely owned 16.9% of Utah firms of any size in 2018 (while men owned 59.0%). Adding in co-ownership with men, the female share rose to 41.0% (versus 83.1% for men), still far below the 75% outcome for independent sales representatives in direct selling.[40]

Three ethnic or racial groups were overrepresented among independent sales representatives for whom direct selling became a potential source of additional income in 2020: Hispanic or Latino, Native Hawaiian or Other Pacific Islander, and White. Two of the three groups had statewide median incomes well below those of Utahns who were White and not Hispanic or Latino—24% lower for Hispanic or Latino people and 20% lower for individuals who were Native Hawaiian or Other Pacific Islander—based on averages from 2015 to 2019.[41] Nationwide, Hispanic or Latino people made up 22% of individuals involved with direct selling, compared with their 17% adult population share. The Hispanic or Latino share rose from 20% to 22% in 2015.[42] The second overrepresented group, Native Hawaiian or Other Pacific Islander, likewise made up a larger share in the direct selling industry (1%) than in the U.S. adult population (0%, rounded down from 0.2%). Finally, people who identified as White constituted 87% of individuals involved in direct selling nationwide, but only 64% of the U.S. adult population.

Other racial minorities were underrepresented among direct selling entrepreneurs and discount buyers. For example, 8% of the people involved in direct selling in 2020 were Black or African American, well below their 12% share of the adult population. This disparity was smaller in 2015 when 11% of people involved in direct selling were Black or African American, compared with their 12% share of the U.S. adult population.[43] In 2020, the largest difference between direct selling and the general population was among people belonging to racial groups that were not itemized (i.e., "Some Other Race") or "Two or More Races." Differences in survey questions and methods likely account for some disparities, particularly in these two groups. Available data does not address Utah demographic dynamics for direct selling participants.

Section 5: Conventions

Direct selling companies have held large events in Utah on a regular basis. Each year, direct selling conventions bring an estimated $41.6 million in consumer spending to Utah from out-of-state visitors, based on visitation and spending patterns from 2011 to 2019—before pandemic irregularities began. This section analyzes conventions hosted by 10 large companies in Utah's direct selling industry, although events held by other companies in the industry likely attracted additional visitors and spending to the state.

Event Characteristics: 10 Multi-Day Conventions Annually Averaging Nearly 6,200 Attendees

The companies that responded to a 2021 industry survey held a combined total of 51 conventions in Utah from 2015 to 2019 (see Table 10). Each convention attracted an average of 6,198 attendees, and companies in this prominent industry subset held a total of 7 to 14 events per year. Visitors typically stayed an average of 3.8 days in Utah based on attendance figures and the duration of events that were 1 to 10 days in length.

For direct selling conventions where company survey responses named a venue or city, 99.7% of convention attendance was at Salt Lake City events. The remaining 0.3% of attendees went to events in Lehi, Midway, Park City and Sandy. Companies specified a venue or city for 46 conventions, accounting for more than half (60.1%) of total attendance at direct selling conventions from 2015 to 2019.

Visitation From Over 310,000 Domestic and International Attendees Across Five Years

Most attendees to conventions held by Utah direct selling companies were from outside the state. From 2015 to 2019, at least 316,116 visitors attended these industry events (see Table 11). Average annual attendance totaled 63,223 people, including 58,887 out-of-state visitors. An estimated 93.1% of attendees visited from another state or country, and the remaining 6.9% were from Utah (see Figure 11).

Table 10: Selected Conventions Direct Selling Companies Held in Utah, 2015–2019

Year	Number of Conventions	Average per Convention	
		Attendance	Duration (Days)
2015	7	6,792	3.7
2016	14	4,119	3.9
2017	12	6,393	4.4
2018	9	7,159	3.4
2019	9	7,751	3.4
All Years	**51 (10.2 per year)**	**6,198**	**3.8**

Note: Average duration calculated as an attendance-weighted mean. Event duration was missing for six conventions: two in 2015 and one per year from 2016 to 2019. The Gardner Institute imputed their duration from the weighted mean of the 45 conventions for which duration was specified. Those 45 conventions accounted for more than half (59.5%) of total attendance.

Source: Kem C. Gardner Policy Institute analysis of data from a 2021 direct selling industry survey by Dorsey & Whitney LLP

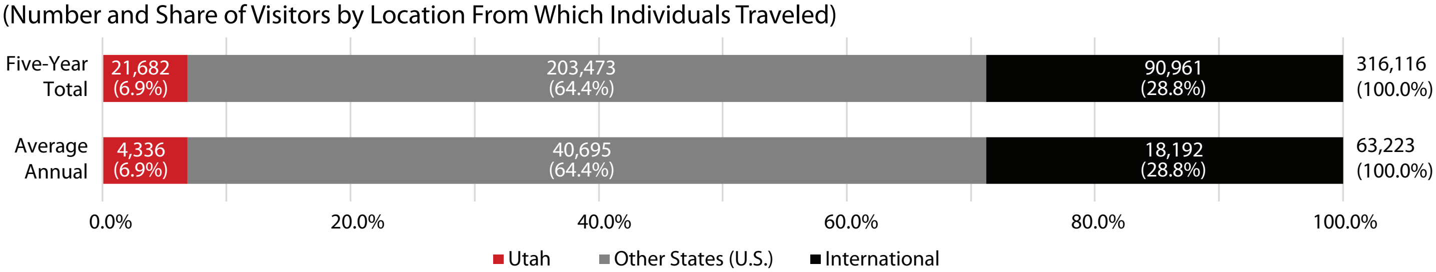
Table 11: Annual Attendance at Selected Direct Selling Conventions in Utah, 2015–2019
(Attendance by Location From Which Individuals Traveled)

Year	Utah	Other States	International	Total
2015	2,888	25,516	19,141	47,545
2016	4,247	40,431	12,984	57,662
2017	4,997	50,027	21,690	76,714
2018	5,012	45,194	14,229	64,435
2019	4,538	42,305	22,917	69,760
Total	**21,682**	**203,473**	**90,961**	**316,116**
Annual Average	**4,336**	**40,695**	**18,192**	**63,223**

Note: For five conventions with limited data on visitor origin, the Gardner Institute apportioned attendance by location based on attendance-weighted averages of the 46 conventions from companies that provided more attendance details. The heading "Other States" refers to out-of-state domestic attendees from the U.S.

Source: Kem C. Gardner Policy Institute analysis of data from a 2021 direct selling industry survey by Dorsey & Whitney LLP

Figure 11: Attendance at Selected Direct Selling Conventions in Utah, 2015–2019
(Number and Share of Visitors by Location From Which Individuals Traveled)



Source: Kem C. Gardner Policy Institute analysis of data from a 2021 direct selling industry survey by Dorsey & Whitney LLP

Convention Visitor Spending for Economic Impact Analysis: At Least $41.6 Million per Year From Outside the State

Visitor spending from conventions held by Utah direct selling companies attracted an estimated $41.6 million per year to the state (see Table 12). This lower-bound estimate from direct selling events held from 2015 to 2019 represents the activity of 10 significant companies selected to participate in an industry survey. The leisure and hospitality sector earned most of this visitor spending as out-of-state attendees spent an average of $423 per person on lodging, restaurants, entertainment, etc. Retail purchases followed with an average of $219 per trip. Local transportation earned the least at $64 per person, less than 10% of the total.

The spending of guests traveling to Utah from another state or country constitutes an economic impact. In contrast, the spending of local attendees represents money that they likely would have otherwise spent in Utah. The $41.6 million in out-of-state visitor spending is part of the results for the industry's footprint in Section 1. Direct impacts from this spending include 497 jobs, of which more than two-thirds are in the leisure and hospitality sector and one-fourth are in retail trade. Direct personal income impacts include $14.6 million in employee compensation.

Table 12: Non-Local Visitor Spending From Selected Direct Selling Conventions in Utah, 2015–2019
(2020 Dollars)

Spending Category	Average per Visitor	Annual Total	Share of Total
Leisure & Hospitality	$423	$24,898,908	59.9%
Retail Trade	$219	$12,894,077	31.0%
Transportation*	$64	$3,779,299	9.1%
Total	**$706**	**$41,572,284**	**100.0%**

*Transportation spending includes transit, rentals and parking, but not airfare, since an unknown portion of that spending directly benefits Utah's economy for flights originating from other states and countries.

Source: Kem C. Gardner Policy Institute and Dorsey & Whitney LLP

Section 6: Research Methods

This report depends on multiple data sources and estimation methods to illuminate a single-year snapshot of a significant Utah industry. The Gardner Institute relied on administrative employment and wage data for named direct selling companies in the industry in 2020. An industry survey in 2021 supplemented this data for a subset of companies by providing details on sales, sales representatives and conventions. These sources provided key inputs for economic and fiscal impact modeling. However, data limitations precluded systematic historical comparisons and trend analyses.

Industry Definition: Identifying Direct Selling Companies and Their Suppliers

Utah's direct selling industry consists of direct selling companies and a variety of suppliers that provide them with essential inputs and services. Research for this report relied on industry feedback regarding which companies belonged in these two categories in 2020. The direct selling company list aims at comprehensiveness, while the supplier company list is insightful without attempting to catalogue the myriad small and large enterprises from which direct selling companies purchase inputs.

With input from the Utah Direct Selling Coalition, the professional firm Dorsey & Whitney LLP identified 91 direct selling companies in Utah during 2020 (see Table 13). The criteria for inclusion in this point-in-time industry definition were that a company have employees working in Utah, not just customers, and that a company primarily use direct selling methods that rely on the entrepreneurship and personal networks of independent sales representatives. Researchers verified the companies' presence and employment activity in Utah using the Utah Department of Workforce Services' (DWS) public dataset FirmFind. Subsequently, DWS economists reviewed and processed the final list of companies after meeting with Gardner Institute researchers about their information request.

Some product segments within Utah's direct selling industry overlap; one in 10 companies belong to more than one segment. Classification by researchers involved judgment calls, such as deciding whether a company's products primarily fit in the Health & Wellness category versus Beauty & Fashion. Dorsey & Whitney staff addressed determinations like these, and Gardner Institute researchers reviewed product segment classifications.

Dorsey & Whitney identified 66 in-state suppliers that provide both goods and services inputs to direct selling companies (see Table 14). The firm compiled and corroborated recommendations from individuals in Utah's direct selling industry for this list. The guiding principle for inclusion was that a company's primary line of business be supplying inputs to direct selling companies. Access to business customers in the industry must be seen as a major or sole reason for their presence in the state. Without Utah's established direct selling industry, these suppliers would likely not be viable in Utah, at least not at the level at which they operated in 2020. To corroborate personal judgments by professionals about whether a particular candidate met the criteria for the list of Utah suppliers for this study, Dorsey & Whitney selected only companies with two or more mentions from either representatives of direct selling companies or an industry expert.

Survey Methods: 2021 Data Collection From Leading Utah Companies

Dorsey & Whitney LLP created an industry survey for companies to report direct sales amounts, sales representatives and in-state conventions. The Gardner Institute collaborated with the firm to create the questionnaire. Dorsey & Whitney invited 12 Utah direct selling companies to participate in the industry survey (see Table 13). In May and June of 2021, 10 companies submitted responses. Dorsey & Whitney compiled their responses and de-identified companies before transmitting the data securely to the author. Gardner Institute researchers then analyzed and interpreted the survey results.

Convention estimates in Section 5 involved additional analysis. The Gardner Institute began with survey data it previously collected regarding spending patterns from 2011 to 2019 for non-local attendees to six Salt Lake City conventions of direct selling companies: doTERRA (two conventions), Melaluca, USANA, Xango and Young Living. Attendance ranged from about 5,000 to 30,000 people, and event duration was four to seven days. Visitor spending averaged $830 per person per trip in inflation-adjusted 2020 dollars. To calculate single-year aggregate spending, visitor spending by category was multiplied by the average number of out-of-state visitors to direct selling events from 2015 to 2019, based on an industry survey conducted in 2021.[44] Calculations for the results in Table 12 required an adjustment for convention duration, which was slightly longer for the events driving the estimates of spending per visitor (4.4 days) than it was for the events driving the out-of-state attendance estimate (3.8 days). Hence, the average spending per visitor of $706 total for 2015–2019 differs from the $830 total for 2011–2019 convention attendee surveys.

Table 13: Utah Direct Selling Companies

(Office Location and Average Employment in 2020)

Company[1]	County	Employment[2]	Surveyed[3]
4Life Research USA	Salt Lake	205 to 405	Yes
Activz	Salt Lake	21 to 53	No
AddieJade's	Duchesne	10 to 19	No
Agnes & Dora	Utah	10 to 19	No
Anovite Inc.	Salt Lake	10 to 19	No
Apex Energy Solutions	Washington	0	No
Aptive Environmental	Utah	270 to 548	No
Arego Life	Utah	5 to 9	No
ASEA Global	Utah	100 to 249	Yes
Beauty Industry Group	Salt Lake	50 to 99	No
BeneYOU	Utah	20 to 49	No
Blue Raven Solar	Utah	170 to 397	No
Caliber Smart	Utah	20 to 49	No
Chalk Couture	Salt Lake	50 to 99	No
Clad & Cloth	Utah	10 to 19	No
Close to My Heart	Utah	50 to 99	No
Coseva	Utah	Less than 5	No
doTERRA	Utah	2,265 to 3,526	Yes
E. Excel International	Salt Lake	20 to 49	No
Engage Global	Utah	10 to 19	No
Enjoy Technology	Salt Lake	5 to 9	No
Epicure	Salt Lake	10 to 19	No
Forever Green	Utah	10 to 19	No
GRENX	Salt Lake	10 to 19	No
In a Pikle	Salt Lake	Less than 5	No
Invisus	Utah	10 to 19	No
Jeunesse	Salt Lake	50 to 99	No
Joy to Live	Salt Lake	Less than 5	No
Juuva	Utah	5 to 9	No
Kuvera Global	Davis	10 to 19	No
LGCY Power	Utah	20 to 49	No
LifeVantage	Salt Lake	100 to 249	Yes
LifeWave	Salt Lake	10 to 19	No
Limbic Arc	Utah	Less than 5	No
Limitless Worldwide	Salt Lake	Less than 5	No
LIV International	Utah	5 to 9	No
LivElite[4]	Salt Lake	Less than 5	No
LurraLife	Davis	10 to 19	No
Max International	Salt Lake	20 to 49	No
Modere	Utah	100 to 249	Yes
Modexus	Salt Lake	Less than 5	No
MojiLife	Utah	10 to 19	No
Nature's Sunshine	Utah	370 to 797	Yes
NewAge[5]	Utah	161 to 371	Yes
New U Life	Utah	50 to 99	No
NineFold Marketing	Weber	20 to 49	No
Nu Skin	Utah	606 to 1,260	Yes
Paparazzi Accessories	Washington	250 to 499	No
Perfectly Posh	Salt Lake	20 to 49	No
Pixingo	Salt Lake	Less than 5	No
Plunder Design	Utah	100 to 249	No
Puratae	Utah	Less than 5	No
Q Sciences	Utah	50 to 99	No
Rain International	Utah	20 to 49	No
Renatus	Davis	10 to 19	No
Rocky Mountain Oils	Utah	10 to 19	No
Seint	Washington	50 to 99	No
SendOutCards	Salt Lake	50 to 99	No
Shaklee	Salt Lake	5 to 9	No
Shine Cosmetics	Utah	5 to 9	No
Sibu Beauty	Salt Lake	Less than 5	No
Sisel International	Utah	20 to 49	No
Solle Naturals	Utah	10 to 19	No
SPX Nutrition	Salt Lake	1 to 4	No
Stampin' Up[6]	Utah	300 to 598	No
SupraNaturals	Utah	100 to 249	No
Thrive Life	Utah	100 to 249	No
Tranont	Salt Lake	5 to 9	No
TruIQ Global	Salt Lake	1 to 4	No
Truvy	Salt Lake	50 to 99	No
Unicity International	Utah	100 to 249	No
United Financial Freedom	Salt Lake	10 to 19	No
Uppercase Living	Salt Lake	5 to 9	No
USANA Health Sciences	Salt Lake	520 to 1,048	Yes
Vantage Marketing Group	Utah	10 to 19	No
Vasayo	Utah	20 to 49	No
VIIVA	Utah	5 to 9	No
Vísi	Utah	10 to 19	No
Vitatrade Group	Salt Lake	20 to 49	No
Wanae USA	Salt Lake	1 to 4	No
Wink Naturals	Utah	Less than 5	No
Xyngular	Utah	100 to 249	No
Yoli	Salt Lake	50 to 99	No
Young Living	Utah	1,505 to 3,007	Yes
Youngevity	Utah	20 to 49	No
Younique	Utah	300 to 598	Yes
Zallevo[7]	Washington	10 to 19	No
Zija International	Utah	Less than 5	No
Zrii	Salt Lake	5 to 9	No
Zyia Active	Salt Lake	100 to 249	Yes
ZYTO Corp	Utah	Less than 5	No

Note:

1. Companies doing business under the name given here may also identify in 2020 employment and wage data by an alias, a former name, or that of a subsidiary or parent company. Prominent examples include BioMedical Research Laboratories (4Life Research), Immune Tree (Anovite), Synergy Worldwide (Nature's Sunshine), Morinda and ARIIX (NewAge), Maskcara (Seint), First Green House Investment (TruIQ), Worth Unlimited (United Financial Freedom), Hale & Wood (Uppercase Living), BRS Field Ops (Blue Raven), and Warr Productions (Clad & Cloth).
2. Disclosure limitations prevent the reporting of exact employment counts by company. Utah employment at direct selling companies does not include independent sales representatives (direct sellers).
3. In 2021, Dorsey & Whitney conducted a company survey of 12 direct selling companies addressing sales, sales representatives and conventions; 10 companies responded to at least one question.
4. LivElite was formerly Syntec Global.
5. NewAge has three offices in Utah County and one in Davis County.
6. Stampin' Up also has a Kane County location, but most of its employment is in Utah County.
7. Zallevo operated as HealthSync Global until September 2020.

Source: Dorsey & Whitney LLP (company list) and Utah Department of Workforce Services (location and employment)

Table 14: Selected Utah Suppliers to Direct Selling Companies
(Office Location and Average Employment in 2020)

Company[1]	County	Employment[2]	Type
ABL Manufacturing	Utah	20 to 49	Manufacturing
Albion Laboratories	Davis	100 to 249	Manufacturing
All About Naturals	Salt Lake	Less than 5	Ingredients
Analytical Resource Laboratories	Utah	20 to 49	Services
Balchem Corporation	Salt Lake	10 to 19	Manufacturing
Barrington Nutritionals	Davis	5 to 9	Ingredients
Biotron Laboratories	Davis	20 to 49	Ingredients
Adaptive Health	Salt Lake	100 to 249	Manufacturing
Blue Mountain Labs	Utah	20 to 49	Manufacturing
Capstone Nutrition	Weber	250 to 499	Ingredients
CAPTEK Softgel International	Salt Lake	Less than 5	Manufacturing
CorePack Manufacturing	Utah	10 to 19	Manufacturing
CSB Nutrition	Utah	100 to 249	Manufacturing
Deseret Laboratories	Washington	100 to 249	Manufacturing
DirectScale	Utah	20 to 49	Services
Dyad Laboratories	Salt Lake	20 to 49	Manufacturing
Dynamic Blending Specialists	Utah	50 to 99	Manufacturing
Elite Manufacturing & Packaging	Utah	100 to 249	Manufacturing
Elite Ops	Utah	20 to 49	Services
Equinox Nutraceutical	Utah	50 to 99	Manufacturing
ESM Fulfillment	Salt Lake	10 to 19	Services
Flexpak	Davis	50 to 99	Ingredients
Glanbia Nutritionals	Salt Lake	Less than 5	Manufacturing
Global Access	Salt Lake	20 to 49	Services
Hudson Printing	Salt Lake	100 to 249	Services
HWR Packaging	Salt Lake	10 to 19	Manufacturing
InfoTrax Systems	Utah	100 to 249	Services
Innophos Nutrition	Davis	100 to 249	Services
Innovative Labs	Utah	250 to 499	Manufacturing
InPivota	Utah	20 to 49	Ingredients
Intermountain Nutrition	Utah	250 to 499	Manufacturing
Level 3 Nutraceuticals	Cache	Less than 5	Manufacturing
LiquaDry	Millard	50 to 99	Ingredients
Live Earth	Emery	10 to 19	Ingredients
MBI Nutraceuticals	Utah	10 to 19	Manufacturing
MeriCal	Weber	100 to 249	Manufacturing
Modern Display	Salt Lake	20 to 49	Services
Mineral Resources International	Weber	20 to 49	Manufacturing
Nellson Nutraceutical	Salt Lake	100 to 249	Manufacturing
Complete Merchant Solutions	Utah	50 to 99	Services
Nutrabrand Labs	Weber	100 to 249	Manufacturing
Nutraceutical Corporation	Weber	105 to 258	Manufacturing
Nutrix International	Salt Lake	100 to 249	Manufacturing
Origin Nutraceutical	Utah	20 to 49	Manufacturing
Paragon Fulfillment	Salt Lake	5 to 9	Services
Pharmachem	Weber	20 to 49	Ingredients
Pharmatech Labs	Utah	120 to 298	Manufacturing
Prolifix Nutrition	Washington	20 to 49	Manufacturing
ProPay	Utah	50 to 99	Services
Sabinsa Corporation	Utah	20 to 49	Manufacturing
Scientific Consumables & Instrumentation	Salt Lake	10 to 19	Services
Simplified Supplements	Salt Lake	20 to 49	Manufacturing
The HB Group	Salt Lake	10 to 19	Services
Tropical Resources	Utah	20 to 49	Manufacturing
Univar Solutions USA	Salt Lake	20 to 49	Services
UST	Davis	120 to 298	Manufacturing
Sound Concepts	Utah	50 to 99	Services
Veritiv	Salt Lake	62 to 126	Services
Vitalpax	Washington	50 to 99	Manufacturing
Vox Marketing Group	Utah	20 to 49	Services
Vox Nutrition	Salt Lake	100 to 249	Manufacturing
Wasatch Laboratories	Weber	5 to 9	Manufacturing
West Wind Litho	Salt Lake	20 to 49	Services
Western Botanicals	Utah	20 to 49	Manufacturing
Western States Calibration	Salt Lake	20 to 49	Services
Xirect Software Solutions	Utah	5 to 9	Services

Note:
1. Companies doing business under the name given here may also identify by an alias or parent company name. For example, Pharmachem is a division of Ashland Global Holdings, and Verb Technology Company acquired Sound Concepts.
2. Disclosure limitations prevent the reporting of exact employment counts by company.

Source: Dorsey & Whitney LLP (company list) and Utah Department of Workforce Services (location and employment)

Modeling Economic Impacts

The economic impacts of the direct selling industry include direct, indirect, induced and fiscal impacts. The first three make up total economic impacts. Direct impacts are from direct selling companies themselves and from convention attendees' spending at Utah businesses, while indirect and induced impacts are from individuals and companies not primarily engaged in direct selling. The Gardner Institute measures all three types of impacts in terms of jobs and personal income.

The Gardner Institute typically estimates gross domestic product (GDP) as part of its economic impact analysis for Utah industries. GDP is a measure of the total economic activity of a region and represents the value added from the creation of goods and services. GDP is calculated by subtracting the value of capital and labor inputs to production from outside the industry or state from total output (sales). In the case of direct selling, insufficient data on output and inputs to production made GDP calculations unreliable. The direct selling companies and suppliers included in the study were unlike other wholesale, retail and manufacturing companies. The primary difference was the unusually high volume of sales per employee at direct selling companies, which was likely related to the complementary work of an uncharacteristically large external sales force of independent contractors. Typical GDP estimation methods did not align with sales data reported by the 10 large companies analyzed in this report, which made up more than half of industry employment.

Direct impacts result when companies in the industry spend money on payroll for employees and purchases from suppliers. While out-of-state sales drive most company spending, even the portion of companies' activity sustained by in-state revenue counts in this economic impact analysis, which was guided by the research question "How much of Utah's economic activity would go away if the state did not have a direct selling industry?"[45] Direct impacts also include the payroll and purchases of companies where out-of-state visitors to direct selling conventions spend. To establish direct economic impacts, Gardner Institute researchers used information that direct selling companies reported to the Utah Department of Workforce Services in the Quarterly Census of Employment and Wages. To estimate spending by convention attendees, researchers used previous Gardner Institute visitor surveys at direct selling events as well as results from a 2021 industry survey that Dorsey & Whitney conducted for this report. Due to data limitations, the activity of independent sales representatives is not specifically modeled for the direct selling industry's economic impacts. However, sales operations are included in economic impacts using estimates based on averages from sectors with direct selling companies.

Quantifying indirect and induced impacts involves economic modeling. Indirect impacts result from spending by in-state companies from which direct selling companies purchase inputs; Table 14 names and describes many of these suppliers. Induced economic impacts result from in-state personal spending by workers who earn income from direct selling companies or their suppliers.

This study's direct selling industry definition includes 66 suppliers to direct selling companies as part of the direct impacts. This approach captures the indirect and induced impacts for all activity at these key suppliers, including activity in service of out-of-state direct selling companies. The Gardner Institute designed a model to avoid double-counting with supplier activity already estimated as part of indirect impacts. The model uses industry averages to estimate the 66 suppliers' portion of in-state purchases by direct selling companies. Researchers counted employment, earnings, and GDP impacts for these selected suppliers as direct impacts and removed them from indirect impacts.

To estimate indirect and induced impacts that resulted from the direct impacts of the direct selling industry, the Gardner Institute customized an economic impact model. REMI PI+ version 2.5, which was developed by Regional Economic Models, Inc., is a dynamic and multiregional simulation software package that estimates the economic, population and labor-market impacts of specific economic changes. The analytical framework incorporates input-output relationships, general equilibrium effects, inter-state migration, economic geography and econometrics.

In the REMI model for Utah used in this study, aggregation yields 23 economic sectors. Most activity in the direct selling industry occurs in the retail trade or wholesale trade sectors, but several companies belong to other sectors. Certain estimates made by the model rely on sector averages regarding business operations, such as the profile of intermediate goods purchased. The Gardner Institute calibrated the model to reflect actual wages that direct selling companies reported paying in Utah. However, the model does not precisely incorporate the activity of independent sales representatives as an element that is distinct from other individual and business contractors common in the broader sector. Data limitations prevented calibration in this respect.

Modeling Fiscal Impacts to Estimate Tax Revenues and Government Expenditures

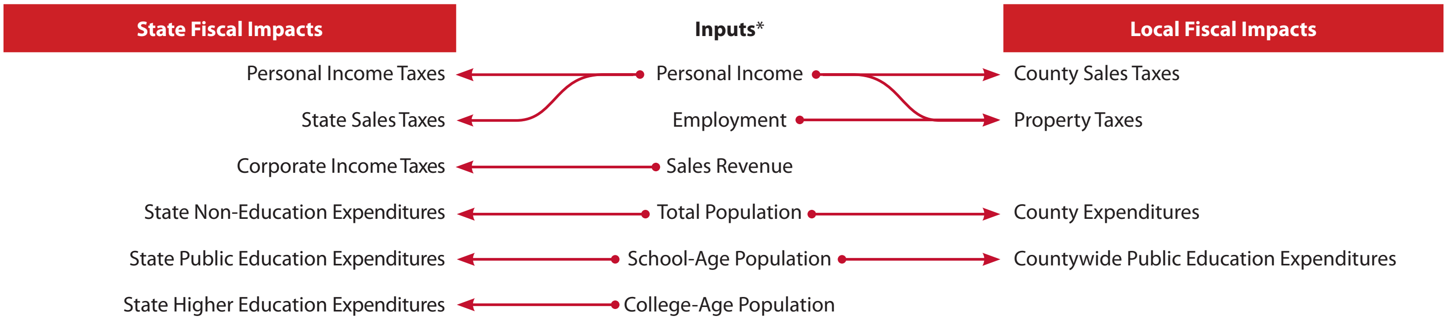
The Gardner Institute's fiscal impact calculator uses economic and demographic measures to estimate state and local revenues and expenditures associated with Utah's direct selling industry (see Figure 12). Revenues are based on ratios of historical tax payments to personal income, industry output and employment; expenditures are based on historical averages of government spending per capita. While the estimates include state and county governments and school districts, they do not include revenue to, or spending by, cities and towns due to data limitations.

Acknowledgements

The Gardner Institute research team relied on productive collaborations with professional staff at four organizations for this study. The author extends appreciation to the Utah Department of Workforce Services and the firm Dorsey & Whitney, LLP. The Utah Direct Selling Coalition and Utah Governor's Office of Economic Opportunity commissioned this study. The coalition is made up of 18 Utah-headquartered companies (12 direct selling companies and six direct selling suppliers).

The Gardner Institute warmly thanks the Utah Department of Workforce Service's David Fogerty, Bureau of Labor Statistics manager, for conducting analyses with custom aggregations

Figure 12: Diagram of Fiscal Impact Calculations



*Calculation inputs are total direct selling economic impacts, including total direct, indirect and induced effects from the REMI PI+ economic model.

Source: Kem C. Gardner Policy Institute

to support this study. Mark Knold, chief economist, and Jeremias Solaris, workforce research and analysis director, were instrumental in reviewing the data request and planning a response.

In dialogue with Gardner Institute staff and representatives of direct selling companies, the staff of Dorsey & Whitney in Salt Lake City provided the list of companies that defines the industry in this report. The firm also administered and assisted in the design of an original survey of Utah direct selling companies. Dorsey & Whitney staff facilitated industry feedback for a robust external review of the research. Gardner Institute researchers particularly recognize Troy Keller, partner, and Cloe Nixon, government affairs analyst. The data they prepared and their knowledge of the industry significantly improved the thoroughness and accuracy of the report.

The author also recognizes John Downen, senior advisor to the Gardner Institute. His research design and REMI modeling assistance was incredibly helpful, as well as his technical review of an early draft of the report.

Endnotes

1. Economic impacts include selected suppliers within the direct selling industry definition for Utah. Analysis methods avoid double-counting supplier activity in direct impacts that is also part of the indirect impacts. Section 6 provides more details on economic impact modeling for Section 1 results.
2. For all Utah and out-of-state direct selling companies, the Direct Selling Association estimates nearly 230,000 independent sales representatives and discount buyers lived in Utah. See Direct Selling Association. (2021a). *Direct Selling in the United States: 2020 Industry Overview.* www.dsa.org/statistics-insights/overview.
3. The 17,487 jobs in Utah's direct selling industry include 11,678 jobs at direct selling companies, 5,312 jobs at selected suppliers in the direct selling industry, and 497 jobs from the direct economic impacts of visitor spending from direct selling conventions in Utah. All three components are also present in direct earnings impacts.
4. Retail impacts include direct selling as well as the purchase of direct sales workers. Manufacturing and business services primarily include suppliers to direct selling companies. Construction includes commercial projects for offices and facilities for both the direct selling industry and other Utah companies supported by spending from direct selling companies and their employees. Construction also includes residential projects at the homes of workers in direct selling and other industries that are part of direct selling's economic impacts.
5. Economic impact modeling addresses sales representatives for 91 direct selling companies in Utah based on industry averages for supplier and customer linkages. In addition, income data in Section 3 incorporates Utah-specific metrics for sales representatives at 10 companies that responded to a detailed survey.
6. Historically, some direct selling companies have incorporated multilevel marketing, a type of direct marketing with incentives for sales representatives to recruit and train other salespeople. The direct sales industry today is defined by its person-to-person retail channels.
7. Fiscal impact results reflect the 157 direct selling companies and suppliers included in this study's industry definition.
8. Direct selling company employment includes employees and does not include independent sales representatives in Utah who are self-employed.
9. Section 2 does not analyze direct selling industry employment that is part of the direct economic impacts of convention visitor spending. Adding 497 jobs from conventions to the 11,678 jobs at direct selling companies and 5,312 jobs at selected suppliers in 2020 yields the total of 17,487 jobs in the direct selling industry shown in Figure 1 (also see Table 1 in Section 1).
10. In the North American Industry Classification System (NAICS), the "nonstore retailers" segment of the retail trade sector includes "direct selling" (NAICS code 4543) based on a much broader definition than the one used for this study. Under NAICS, direct selling includes many business approaches that do not involve person-to-person sales or multilevel marketing, such as the delivery of fuel, bottled water and newspapers. Meanwhile, companies in NAICS categories for e-commerce (retail or wholesale), manufacturing, and a variety of other services incorporate the type of person-to-person direct selling that is a criterion for this economic analysis. However, these companies are not found under "direct selling" or "nonstore retailers" in the NAICS retail trade sector.
11. SupraNaturals is both a direct selling company and a supplier to other companies in the industry. To avoid double-counting, the Gardner Institute does not include the company among suppliers.
12. Economic impact modeling in Section 1 attempts to estimate the value of all in-state direct selling supplier relationships. The 66 suppliers addressed in Section 2 are part of the direct effects, and many other suppliers are part of the indirect effects, that add to the industry's total impact on Utah's economy.
13. Manufacturers also supply ingredients and other materials for direct selling products, aside from transforming these inputs to add value. In

contrast, companies classified as ingredient suppliers primarily provide inputs that are not yet finished products. Direct selling companies further process these inputs.
14. Two of 12 surveyed companies did not respond, which brought the response rate to 83.3% for most questions. Companies selected for the survey were generally larger than other Utah companies in the direct selling industry.
15. The total is 15 because one of the 12 companies that were sent the survey questionnaire participated in three industry segments, and one company participated in two segments.
16. Direct Selling Association. (2021b). *Impact of Direct Selling by State, 2020.* Accessed May 18, 2022. https://www.dsa.org/statistics-insights/factsheets
17. Among all states, Utah ranked 27th in direct selling volume (aggregate dollar amounts), slightly ahead of the Utah economy's size, which was 29th in terms of GDP, according to the U.S. Bureau of Economic Analysis.
18. Direct Selling Association. (2021b). *Impact of Direct Selling by State, 2020.* www.dsa.org/docs/default-source/industry-fact-sheets/2020statestatsfactsheet.pdf
19. The 10.0% lower bound estimate of the share of U.S. direct selling originating from Utah is based on 2020 sales reported by 10 large direct selling companies operating in Utah. Since the 10 companies represent only 57.5% of employment at direct selling companies, sales from all 91 Utah direct selling companies in this study would be higher than 10.0%.
20. In 2020, total sales (gross output) were $343.5 billion for all industries in Utah. See Regional Economic Models, Inc. (2021). REMI PI+ economic model v. 2.5, regional control. https://www.remi.com/wp-content/uploads/2021/07/Model-Overview.pdf
21. The Business Research Company. (2021, May). *Direct Selling Establishments Global Market Report 2021.* www.researchandmarkets.com/reports/5323289/direct-selling-establishments-global-market; U.S. Census Bureau. (2021, July). *Quick Facts: Utah.* www.census.gov/quickfacts/UT; U.S. Census Bureau. (2021, December). *International Database: World Quick Facts (2020)*. www.census.gov/data-tools/demo/idb
22. The 3.0% and 6.5% shares represent 10 of 91 direct selling companies in the industry.
23. International Trade Administration. (2022, March). *State Economy and Trade Factsheets.* U.S. Department of Commerce. https://www.trade.gov/data-visualization/state-economy-and-trade-factsheets
24. Direct Selling Association (2021b)
25. Direct Selling Association. (2020). *DSA 2020 Growth and Outlook Report* (p. 47).
26. In 2020, an estimated 16.7 million people in the U.S. were direct sales representatives or discount buyers. The 6.5% share in 2020 was lower than the 2015 share of 8.2% of the adult population involved in direct selling. See Direct Selling Association. (2021a). *Direct Selling in the United States: 2020 Industry Overview.* www.dsa.org/statistics-insights/overview and Direct Selling Association. (2016). *Direct Selling in 2015: An Overview.* www.dsa.org/docs/default-source/research/growth-outlook/dsa_2016gandofactsheet.pdf.
27. Many sales representatives in Utah work for the remaining in-state direct selling companies or for out-of-state companies that participate in the Utah market. In-state and out-of-state companies may have more discount buyers in Utah than sales representatives.
28. Of 12 Utah companies surveyed, one response offered independent sales representative counts aggregated by county.
29. Of 12 Utah companies surveyed, six responses were complete for questions about independent sales representatives incomes.
30. Aggregated industry-wide information about independent sales representatives' income from direct selling is limited. Of 12 companies surveyed, six provided income details for independent direct sellers in Utah. Also, companies do not always know how much of the products sales representatives and discount buyers order are resold, and pricing may vary.
31. Reporting varied in terms of whether companies included individuals eligible to sell with no income in 2020 in companies' average or median calculations. Another method was to use the larger average for the subset of eligible sales representatives who made sales that year. For example, in one company, just under one-third of eligible sales representatives made sales that were tracked. Removing sales representatives with zero sales from the calculation increased the average by 216% for one company and 653% for another company. The remaining three companies that responded provided averages that included individuals with $0 in 2020 sales.
32. Examples of income disclosure statements are DoTERRA. (2019). *Opportunity and Earnings Disclosure Summary.* https://media.doterra.com/us/en/flyers/opportunity-and-earnings-disclosure-summary.pdf; Young Living. (2020). *Income Disclosure Statement.* https://www.youngliving.com/us/en/income-disclosure; Nu Skin. (n.d.). *2020 Brand Affiliate Sales Compensation Summary: U.S. Market.* https://www.nuskin.com/content/dam/office/n_america/US/en/business_materials/distearnings.pdf; and USANA Health Sciences. (n.d.) *2020 Income Disclosure Statement.* https://www.usana.com/static/images/na/Training/ComplianceCorner/IncomeDisclosureStatement-US-EN.pdf.
33. The 2017 survey received responses from 601 current and former participants in the U.S. direct selling industry regarding their cumulative profit (income minus expenses) to date, without an explicit inflation adjustment. See DeLiema, M., Shadel, D., Nofziger, A., & Pak, K. (2018). *AARP Study of Multilevel Marketing: Profiling Participants and their Experiences in Direct Sales.* AARP Foundation. www.aarp.org/content/dam/aarp/aarp_foundation/2018/pdf/AARP%20Foundation%20MLM%20Research%20Study%20Report%2010.8.18.pdf.
34. Backlund, M., Bateman, M., Brandley, A., Christensen, M., Dean, P., Downen, J., Dejan, E., Gochnour, N., Hogue, M., Hollingshaus, M., Pace, L., Perlich, P. S., Robinson, J., Springer, P., Summers, L., & Wood, J. (2021, May 6). *Diversity in Utah: Race, Ethnicity, and Sex (Data Book)*. Kem C. Gardner Policy Institute (pp. 11 & 14). https://gardner.utah.edu/diversity-in-utah-data-book/
35. Direct Selling Association (2021a)
36. In 2020, direct selling companies estimated that 16.7 million people participated in direct selling nationwide. Of that number, 7.7 million (46.1%) were direct sellers and 9.0 million (53.9%) were discount buyers. These figures may count people affiliated with multiple companies more than once.
37. Limited Utah data suggests women's representation in direct selling in the state may exceed the national average. A 2021 industry survey of selected Utah direct selling companies gathered responses from five companies with a collective $4.3 billion in 2020 sales; of their 14,178 sales representatives, 88.9% were women. Besides the small Utah sample size, this high percentage is not directly comparable to the 75% average nationwide because the latter share includes discount buyers who did not direct sell in 2020.
38. Backlund et al. (2021, May 6). See endnote 34 for full citation.
39. Women's share was similar in 2015, making up 77% of people involved in direct selling (independent sales representatives and discount buyers) . Two years later, a 2017 survey of current and former direct sales representatives found that 60% were women, which suggested that inclusion of women among direct selling entrepreneurs has trended upwards. However, this finding for the "multilevel marketing" industry is not directly comparable to single-year 2015 or 2020 survey results from the Direct Selling Association. See DeLiema, M., Shadel, D., Nofziger, A., & Pak, K. (2018) and Direct Selling Association (2016)
40. Backlund et al. (2021, May 6)
41. Backlund et al. (2021, May 6)
42. Direct Selling Association (2016)
43. Another source found an even smaller racial disparity among current and former direct sales representatives in the U.S. who were surveyed in 2017; in that year, 13% were Black or African American, slightly above their 12% share of the general adult population. This finding is not directly comparable to single-year 2015 or 2020 survey results from the Direct Selling Association because the 2017 survey describes people involved in the "multilevel marketing" industry at any point in their lives. See DeLiema, M., Shadel, D., Nofziger, A., & Pak, K. (2018).
44. This study's analysis of direct selling industry conventions estimates economic impacts of visitors from outside Utah. However, estimates of spending per visitor are for visitors from outside Salt Lake County. Presumably, visitors from outside Utah spend at least as much as visitors from outside Salt Lake County, some of whom commuted to a venue close to home.
45. In the absence of Utah direct selling companies, in-state consumption of their products would be diverted to alternative sources of these products or substitutes, many of them from outside the state.

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