

Jennifer Leaver
Senior Research Analyst

The State of Utah's Travel and Tourism Industry 2021

Utah's travel and tourism industry has experienced a healthy post-pandemic recovery, yet continues to face a service industry labor shortage, stunted international visitation, and inflationary headwinds.

February 2023

The State of Utah's Travel and Tourism Industry 2021

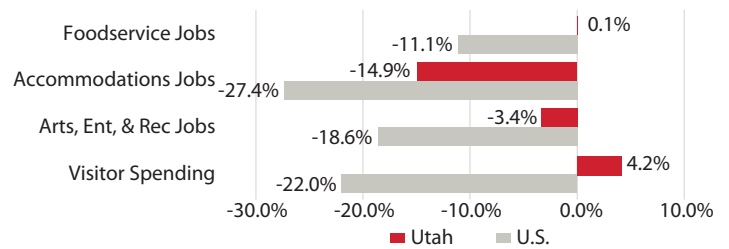
Analysis in Brief

In 2021, direct visitor spending totaled a record \$10.56 billion in Utah, a 42.5% increase from 2020. As a result, Utah travel and tourism spending supported 130,600 jobs and generated \$1.81 billion in total tax revenue. Despite COVID's disruptive impact on travel in 2020, Utah's parks, ski resorts, and business travel sector returned to—if not surpassed—baseline 2019 numbers in 2021. Increases in regional auto travel, short-term rental bookings, and rural exploration spurred during the pandemic continued in 2021 and into 2022. However, elevated gas prices and inflation generally, a strong US Dollar, and concerns of a potential recession in the United State led to softening in Utah's travel and tourism industry beginning in the late spring of 2022 and persisting throughout the summer.

Key Findings:

- **Spending** – visitors spent a record \$10.56 billion in the Utah economy in 2021, a 42.5% increase from 2020.
- **Jobs** – Utah's travel and tourism industry provided 89,600 jobs in Utah in 2021. The industry's economic activity led to indirect and induced effects, supporting an additional 41,000 jobs. About 5.9% of Utah jobs were supported by visitor spending in 2021, either directly or indirectly.
- **Tax Revenue** – \$10.56 billion in direct visitor spending and \$9.12 billion in additional indirect and induced spending generated an estimated \$1.81 billion in total tax revenue.
- **Accommodations** – taxable sales in the accommodations sector totaled \$2.62 billion in 2021, a 53.3% year-over increase from 2020 and a 12.3% increase from 2019; in addition, average statewide occupancy rates increased 32.3% and daily room rates were up 23.5%.
- **Visitation** – Utah's national and state parks experienced record visitation in 2021, with year-over increases of 45.0% and 9.8%, respectively; additionally, national park visits were up 5.5% and state parks were up 45.5% from 2019 baseline visitation.

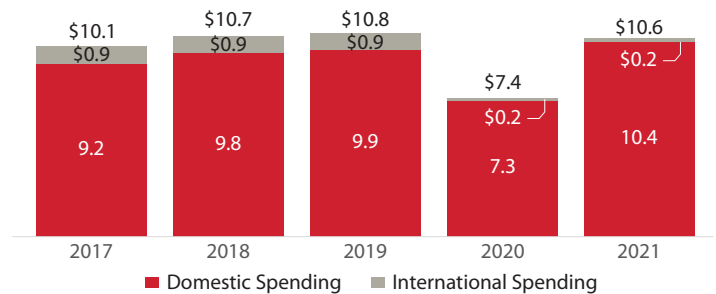
U.S. vs. Utah Travel Indicators, Two-Year Change (2019-2021)



Source: Kem C. Gardner Policy Institute analysis of Tourism Economics, U.S. Travel Association and U.S. Bureau of Labor Statistics data

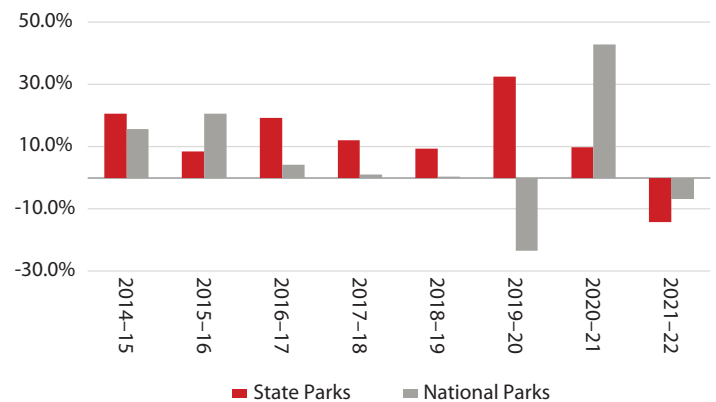
Direct Visitor Spending, 2017-2021

(Billions of 2021 Dollars)



Note: Includes resident, domestic nonresident, and international visitor spending. Source: Kem C. Gardner Policy Institute analysis of Tourism Economics data

Year-Over Change in Park Visitation, 2014-2022



Source: Kem C. Gardner Policy Institute analysis of National Park Service and Utah State Parks data

Table of Contents

Introduction	3
Utah’s Travel & Tourism Industry—Overview and Outlook ...	3
2021 Overview	4
Travel and Tourism Outlook	4
Travel & Tourism: Spending & Visitation	5
Park Visitation	7
Ski Industry	9
Conferences & Conventions	11
Sundance Film Festival	12
Travel & Tourism Employment	12
Tax Revenue	13
Hotel Occupancy & Rates	13
Short-Term Rentals	15
Travel & Tourism Industry — Other Indicators	17
Research Methods	18
References	19

FIGURES

Figure 1: U.S. vs. Utah Travel Indicators, Two-Year Change (2019-2021)	5
Figure 2: Direct Visitor Spending, 2017-2021	5
Figure 3: Visitor Spending by Visitor Type, 2019-2021	5
Figure 4: Direct Visitor Spending by Visitor Type, 2021	5
Figure 5: Direct Visitor Spending Shares by Category, 2021	6
Figure 6: Two-Year Change in Leisure & Hospitality Taxable Sales, 2019-2021	6
Figure 7: Share of Domestic Visitors by State, 2021	7
Figure 8: Share of International Visitors by Country, 2021	7
Figure 9: Change in International Arrivals from Top International Markets, 2019-2021	7
Figure 10: Salt Lake City International Airport Total Passengers, 2021 and 2022 vs. 2019 Baseline	7
Figure 11: Utah National Park Annual Visitor Spending, 2014-2021	7
Figure 12: Utah National Park Visitor Spending by Spending Category, 2021	7
Figure 13: Utah National Park Recreation Visitation, 2004–2022	8
Figure 14: Utah National Park Recreation Visitation, 2021 and 2022 vs. 2019 Baseline	8
Figure 15: Year-Over Change in National Park Visitation by Quarter, 2021	8
Figure 16: Utah National Place Recreation Visitation, 2004-2021	8
Figure 17: Year-Over Change in Park Visitation, 2014-2022	9
Figure 18: Utah Skier/Snowboarder Spending, 2002/03–2021/22	11

Figure 19: Utah Skier/Snowboarder Spending, 2010/11-2021/22	11
Figure 20: Skier/Snowboarder Accommodations Share by Lodging Type, 2021-2022 Season	11
Figure 21: Private Recreation-Related Jobs, Salt Lake and Summit Counties, Winter 2018-2022	11
Figure 22: Downtown Salt Lake City Hotel Occupancy, 2021 and 2022 vs. 2019 Baseline	12
Figure 23: Summit County Hotel Occupancy Rates, Sundance Film Festival, 2020-2022	12
Figure 24: Utah Travel and Tourism Jobs, 2017–2021	12
Figure 25: Direct Travel & Tourism Jobs by Job Type, 2021 vs. 2019	13
Figure 26: Percent Change in Private Leisure & Hospitality Jobs, 2019-2021	13
Figure 27: Total Travel and Tourism-Generated Tax Revenue by Tax Type, 2021	13
Figure 28: Percent Change in County Transient Room Tax Revenue by County, 2019-2021	14
Figure 29: County Transient Room Tax Revenue Gains, 2019-2021	14
Figure 30: Statewide Hotel Occupancy, 2021 and 2022 vs. 2019 Baseline	14
Figure 31: Average Daily Room Rate (ADR) by County, 2021	15
Figure 32: Percent Change in Average Daily Room Rate by County, 2019–2021	15
Figure 33: Utah Short Term Rental Supply by Listing Type, 2022	16
Figure 34: Utah’s Short-Term Rental Supply	16
Figure 35: Percent Change in Short Term Rental Listings by County, 2019-2022	16
Figure 36: Percent Change in Utah Accommodation Capacity by Type, 2019-2022	16
Figure 37: Utah Hotel and Short-Term Rental Occupancy Rates, 2019-2022	16

TABLES

Table 1: Leisure and Hospitality Taxable Sales in Utah, 2019–2021	6
Table 2: Leisure and Hospitality Taxable Sales Top Ten Counties, 2021	6
Table 3: Utah National Park Recreation Visitation by Park, 2019-2021	8
Table 4: Utah National Place Recreation Visitation by Site, 2019-2021	9
Table 5: Utah State Park Visitation by Park, 2019-2021	10
Table 6: Utah’s Passenger Air Industry, 2017–2021	17
Table 7: Utah’s Arts, Entertainment, and Recreation Industry, 2019–2021	17
Table 8: Utah’s Accommodations Industry, 2019–2021	17
Table 9: Utah’s Food Services Industry, 2019–2021	17

This research was sponsored by the Utah Office of Tourism.

Introduction

Utah is home to mountains, forests, red rock and Great Basin deserts, and the largest saltwater lake in the Western Hemisphere. In addition to its year-round outdoor recreation opportunities, Utah has a Native American history and pioneer heritage, a growing arts and culture scene, and a variety of conference and convention venues, all of which attract leisure and business visitors annually.

Although Utah experienced record visitor spending in the amount of \$10.56 billion nominal dollars in 2021, visitor spending was still shy of the \$10.82 billion in 2019 and \$10.67 billion in 2018, when adjusting spending in those years for inflation. This highlights the continued, yet subtle, pandemic impacts on Utah tourism. A large aspect contributing to the tourism industry's delayed rebound is the international travel ban, which was not lifted until November 2021. In fact, Utah's share of international visitor spending has steadily declined since 2019 (from 8.2% to 1.6%). Business travel has experienced a similar downward trend from 10.0% share in 2019 to 7.6% in 2021. Similarly, air travel has yet to fully rebound to pre-pandemic levels, with SLC International Airport passenger counts hovering 1%-10% below 2019 baseline counts up until September 2022. Despite continued pandemic-influenced losses in international visitation and business travel, Utah's domestic, leisure travel market remained strong throughout 2021.

While Utah's national parks, state parks, and ski resorts experienced record visitation in 2021, tourism-related employment continued to lag below baseline, putting pressure on Utah's service-related businesses. Overall, Utah tourism jobs were down 5.8% from 2019. Hotels, restaurants, travel services, and other travel-related industries continued to experience the crunch of the leisure and hospitality labor shortage prompted by the COVID pandemic. However, during the first half of 2022, Utah leisure and hospitality employment surpassed 2019 baseline employment, up 4.5% compared to the first six months of 2019.

As for fiscal impacts, a combination of inflation and increased tax types and rates, 2021 visitor spending generated healthy fiscal impacts to the tune of \$1.81 billion in total tax revenue. Visitor spending spurred increases in every tax type, including state and local sales, income, corporate profits, property and other taxes and fees.

Finally, short-term rentals have been a hot topic over the past few years. They saw a surge in popularity due to their perceived safety during a global health pandemic. While short-term rental capacity has continued to climb since 2019, recent data suggests that short-term rental occupancy rates began to decline in 2022. In contrast, hotel occupancy rates have continued to climb since 2020 and into 2022, suggesting that the short-term rental market may have reached saturation in Utah, though only time will tell.

Utah's Travel & Tourism Industry – Overview and Outlook

2021 Overview

From 2020 to 2021, all of Utah's 29 counties experienced year-over increases in county transient room tax revenue (TRT) and all counties (except San Juan and Salt Lake) collected more TRT in 2021 than in 2019. Additionally, year-over taxable sales in the leisure and hospitality sector increased 32.6% from 2020 to 2021, and were up 10.9% from baseline 2019. Taxable sales in the RV parks and camps sector had the greatest percent increase from 2019 (49.8%), followed by drinking places (22.5%), and restaurants (12.8%). Conversely, taxable sales in the performing arts, spectator sports, and related cultural arts industries still lagged below baseline 2019 (down 26.5%).

From 2020 to 2021, Utah's private leisure and hospitality jobs increased 11.0%, but were still down 3.4% from pre-pandemic 2019. For comparison, all other private sector jobs increased 4.4% from 2020 and 4.3% from 2019. Duchesne County experienced the greatest percent increase in leisure and hospitality jobs from 2019 (20.5%), followed by Beaver County (17.3%), and Uintah County (13.0%). Conversely, San Juan County leisure and hospitality jobs were still down 25.2%, Daggett County jobs remained down 10.1%, and Salt Lake County jobs were still down 9.1% from baseline.

During 2021, Utah's national and state parks experienced record post-pandemic visitation, with particularly strong visitation in winter and the shoulder seasons (early spring/late fall). National park visits landed at 11.3 million in calendar year 2021, a 45.0% increase from pandemic year 2020, and 5.5% above baseline 2019. Utah state parks recorded a record 11.6 million visitors in 2021, up 9.8% from 2020 and up 45.5% from 2019. Beginning in the spring of 2022, however, national park visitation began to decline and state park visitation began to decelerate due to surging food and gas prices, talk of a U.S. recession, a strong US Dollar, and other related issues.

Utah's ski and snowboard industry also experienced a record year with a reported 5.8 million skier days during the 2021-2022 season, a 10.0% year-over increase and up 32.8% from the 2019-2020 season. Utah ski and snowboard visitors spent a record \$2.35 billion in the Utah economy during the 2021-2022 ski season, with out-of-state skiers spending nearly four times as much as local skiers.

In 2022, Utah's Board of Tourism Development allocated nearly \$4.8 million in traditional cooperative marketing matching funds, as well as nearly \$543,000 in additional matching funds for projects incorporating Forever Mighty responsible tourism messaging. Cooperative marketing programs enable destination marketing organizations such as

convention and visitor bureaus, county tourism offices, and nonprofit organizations to combine their marketing dollars with Utah Office of Tourism (UOT) matching funds to promote a wide variety of statewide destinations and events. Additionally, the office awarded \$97,500 in destination development grants to four destinations for six projects. The Office also used \$125,000 in grant money from the U.S. Economic Development Administration to produce a nine-part webinar series focused on destination resilience. The webinars garnered over 800 views.

Visit Salt Lake reports that conference and convention delegate spending in Salt Lake County in the amount of \$143.6 million during the first half of 2022 was down only 2.7% from delegate spending in the amount of \$147.6 million during the first half of 2019, reflecting a near return to pre-pandemic spending. In addition, Salt Lake City's newest convention hotel, the Hyatt Regency, opened to guests in October 2022, paving the way for even larger and more Salt Lake City-based conferences, conventions, and meetings.

In the fall of 2022, the New SLC airport celebrated its 2nd anniversary, acknowledging the 12 million craft hours its over 700 employees have put into airport redevelopment since the project started in July 2014. Phases 2 and 3 of the airport redevelopment are currently underway.

Travel and Tourism Outlook

Softening of Utah's travel market will likely continue in 2023. However, a return of business travel will help blunt the effects of the softening environment. That said, a strong U.S. Dollar will continue to negatively impact international travel to the United States, meaning an international travel post-pandemic rebound remains unlikely until 2024. U.S. Travel Association forecasts that in 2023, domestic air travel will increase an estimated 3.0% above the 2019 baseline, while international air travel will remain 18.0% below baseline, but up an estimated 22.0% from 2022. Additionally, while leisure travel in the United States rebounded to pre-pandemic levels in 2022, business travel is not expected to rebound until 2024. Overall, auto travel is anticipated to continue to be the preferred transportation mode in 2023 with a 5.0% year-over increase. Air travel in 2023 is forecasted to not only increase an estimated 11.0% from 2022, but also return to pre-pandemic 2019 levels.

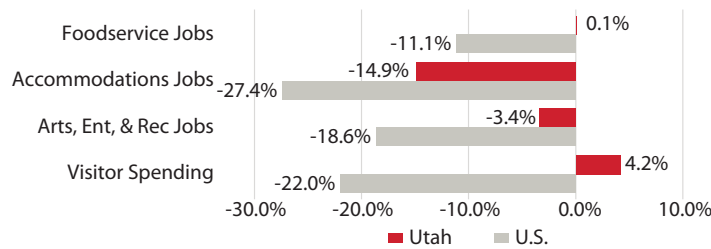
Travel & Tourism: Spending & Visitation

In 2021, Utah's travel and tourism industry fared better than the industry on a national basis. For instance, while Utah visitor spending was up 4.2% from baseline 2019, spending was still down 22.0% nationwide. Although leisure and hospitality employment continued to lag nationally, it has also fared better in Utah than in the rest of the U.S. (Figure 1).

Tourism Economics (TE) reported that Utah travelers directly spent \$10.56 billion in the state's economy in 2021, which constitutes a 42.5% year-over increase. Although this is a record in terms of nominal dollars spent, in terms of real dollars this \$10.56 billion is still 2.4% lower than spending in 2019 (Figure 2).

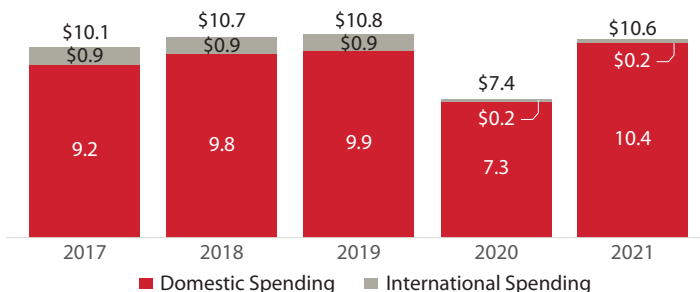
According to TE, domestic visitors contributed 98.4% and international visitors 1.6% of this total spending amount. Utah's international visitor spending share has declined since 2019 when it was 8.2% (Figure 3). In addition, leisure travelers contributed 92.6% of the spending and business travelers contributed 7.4%—a share which has also been dropping since 2019 when it was 10.0% (Figure 4). In 2021, nonresident travelers spent the largest relative shares of visitor dollars on lodging, local transportation, and dining out. Utah resident travelers spent the largest relative shares of visitor dollars on lodging, dining out, and arts, entertainment, and recreation, as well as a smaller relative share on in-state transportation compared with their out-of-state counterparts (Figure 5). TE spending estimates show that spending in all spending categories experienced

Figure 1: U.S. vs. Utah Travel Indicators, Two-Year Change (2019-2021)



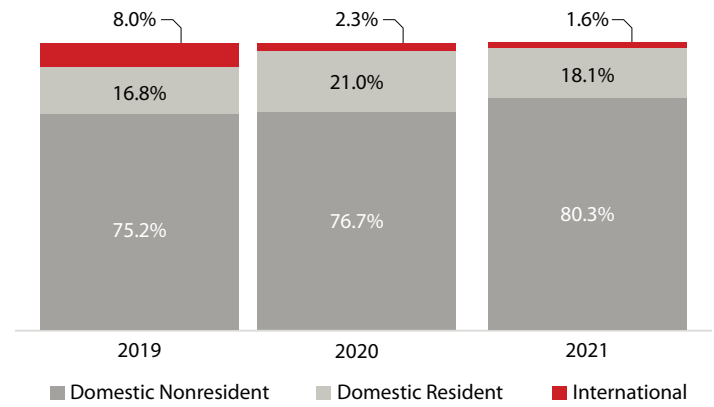
Source: Kem C. Gardner Policy Institute analysis of Tourism Economics, U.S. Travel Association and U.S. Bureau of Labor Statistics data

Figure 2: Direct Visitor Spending, 2017-2021 (Billions of 2021 Dollars)



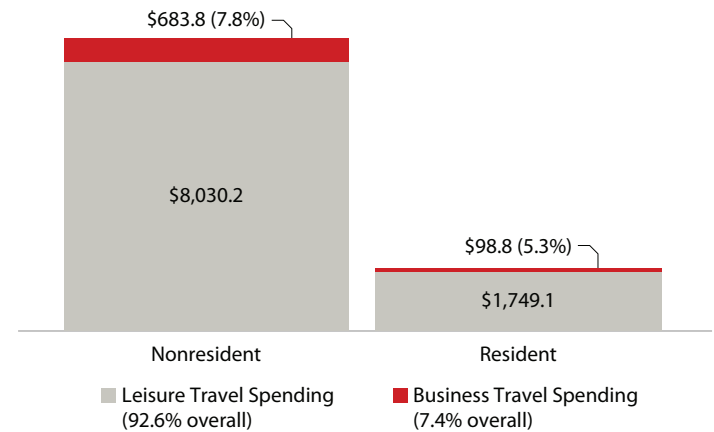
Note: Includes resident, domestic nonresident, and international visitor spending. Source: Kem C. Gardner Policy analysis of Tourism Economics data

Figure 3: Visitor Spending by Visitor Type, 2019-2021



Source: Kem C. Gardner Policy Institute analysis of Tourism Economics data

Figure 4: Direct Visitor Spending by Visitor Type, 2021 (Millions of 2021 Dollars)



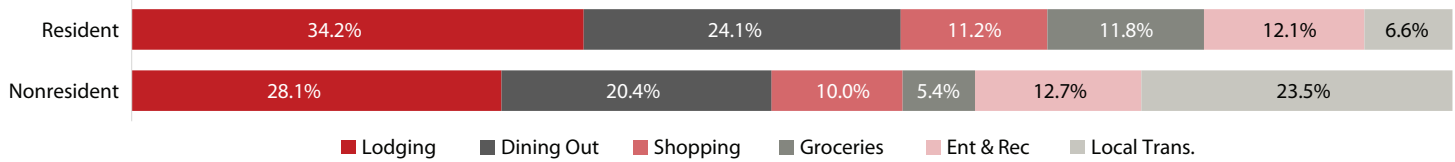
Source: Tourism Economics

healthy increases from 2020. When compared to baseline year 2019, however, there was more variability. For instance, accommodations spending had increased 22.9% from 2019, while 2021 air travel spending was still down 14.5%.

Taxable sales in Utah's leisure and hospitality sector—which includes arts, entertainment, recreation, accommodations, and foodservice—experienced a 32.6% year-over increase and 10.9% increase from baseline year 2019 (adjusted for inflation) (Table 1). In 2021, 59.3% of all leisure and hospitality sales took place in the top three counties of Salt Lake, Utah, and Summit (Table 2). Piute, Rich, and Grand counties reported the greatest percent increase in tourism-related sales from baseline 2019; meanwhile, San Juan County was the only county with 2021 total sales below 2019 (Figure 6).

In 2021, the largest shares of domestic nonresident visitors came from the states of California, Idaho, and Nevada (Figure 7). Canada continued to hold the number one spot for international arrivals, followed by Mexico and China (Figure 8).

Figure 5: Direct Visitor Spending Shares by Category, 2021



Note: Air travel spending has been removed.
 Source: Kem C. Gardner Policy Institute analysis of Tourism Economics data

Table 1: Leisure and Hospitality Taxable Sales in Utah, 2019–2021
 (Millions of 2021 Dollars)

Industry	2019	2020	2021	2019-2021 Change	2020-2021 Change
Performing Arts, Spectator Sports, Related	\$163.56	\$48.55	\$120.2	-26.5%	147.6%
Museums, Historical Sites, Zoos, Parks, Similar	\$66.30	\$47.75	\$71.3	7.5%	49.3%
Amusement & Recreation	\$825.40	\$672.27	\$908.7	10.1%	35.2%
Hotels, Motels, B&Bs, Resorts, Other	\$2,278.80	\$1,649.59	\$2,539.8	11.5%	54.0%
RV Parks, Camps	\$51.99	\$58.18	\$77.9	49.8%	33.9%
Restaurants & Other Eating Places	\$5,130.29	\$4,690.18	\$5,786.6	12.8%	23.4%
Special Food Services, Food Carts	\$579.71	\$459.90	\$562.3	-3.0%	22.3%
Drinking Places (alcoholic beverages)	\$150.97	\$106.15	\$185.0	22.5%	74.3%
Total	\$9,247.03	\$7,732.56	\$10,251.8	10.9%	32.6%

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

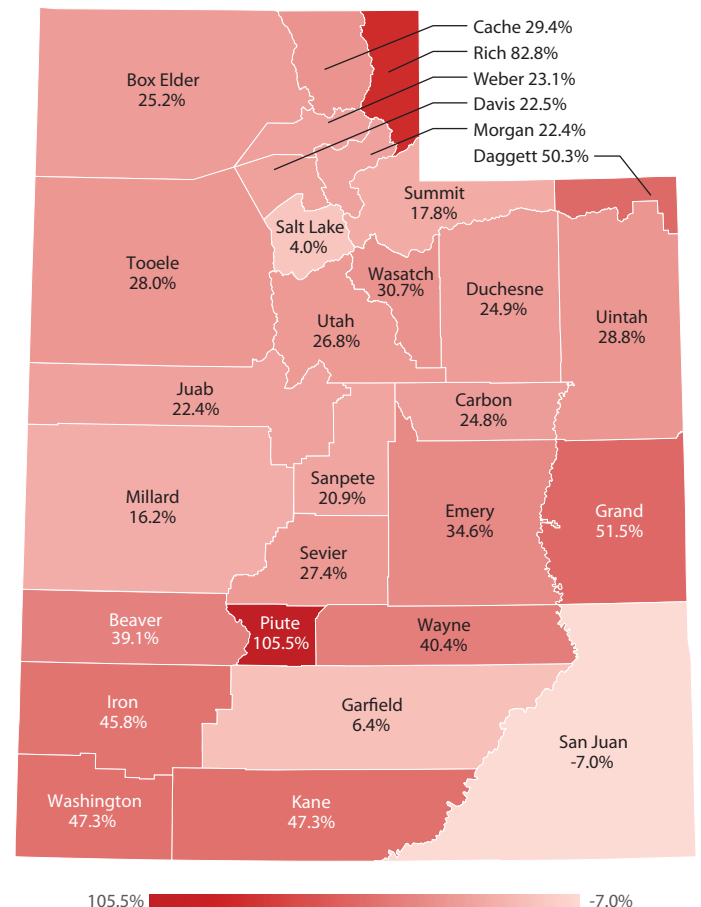
Table 2: Leisure and Hospitality Taxable Sales Top Ten Counties, 2021

County	Amount
Salt Lake	\$3,706,434,092
Utah	\$1,332,350,610
Summit	\$1,042,914,517
Washington	\$894,918,983
Davis	\$781,320,134
Weber	\$579,458,506
Grand	\$306,847,242
Cache	\$248,601,317
Kane	\$213,321,113
Wasatch	\$200,220,878

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

COVID-related travel restrictions, which remained in place until November 8, 2021, negatively impacted Utah’s top international visitor markets in 2021, including a loss of 219,000 Canadian visitors, 68,000 Chinese visitors, and 42,000 German visitors compared to 2019 (Figure 9). Despite lasting travel restrictions and subsequent loss in international visitation, Utah air travel nearly returned to pre-pandemic baseline in July of 2021 and has hovered just under baseline levels ever since (Figure 10).

Figure 6: Two-Year Change in Leisure & Hospitality Taxable Sales, 2019-2021



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

Figure 7: Share of Domestic Visitors by State, 2021



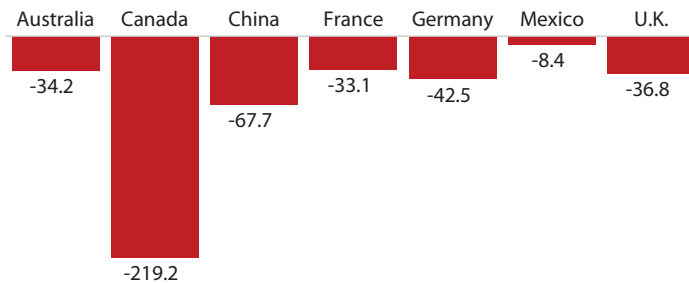
Source: OmniTrak Group Inc.

Figure 8: Share of International Visitors by Country, 2021



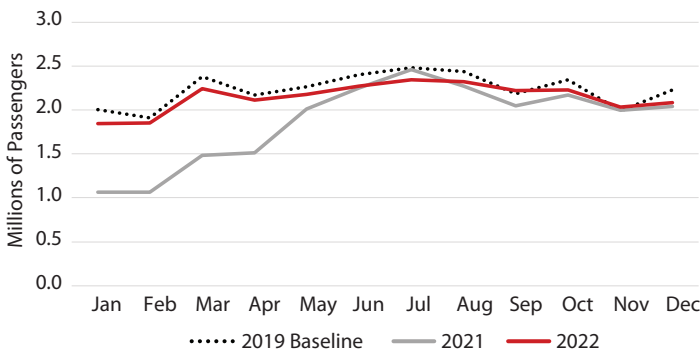
Source: Tourism Economics

Figure 9: Change in International Arrivals from Top International Markets, 2019-2021
(In Thousands of Arrivals)



Source: Kem C. Gardner Policy Institute analysis of Tourism Economics data

Figure 10: Salt Lake City International Airport Total Passengers, 2021 and 2022 vs. 2019 Baseline



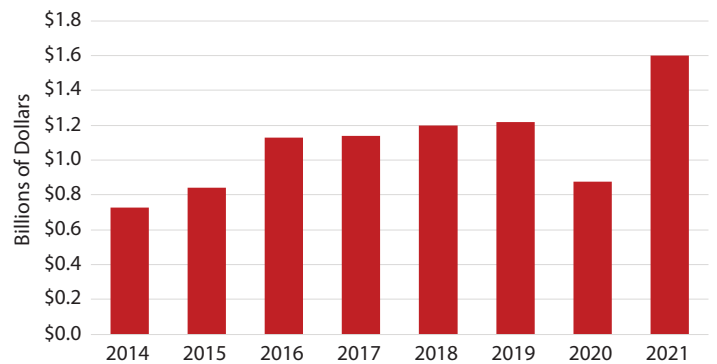
Source: Kem C. Gardner Policy Institute analysis of Salt Lake City International Airport data

Park Visitation

Utah’s parks—including its national parks and monuments (“national places”) and state parks—draw resident and nonresident visitors annually. According to the National Park Service (NPS), visitors spent a record \$1.6 billion (up 33% from 2019) in the Utah economy in 2021, which generated 22,900 jobs, \$822 million in labor income, and \$2.5 billion in total economic output (Figure 11). As in previous years, Utah national park visitors spent the largest dollar shares on lodging, restaurants, and gasoline (Figure 12).

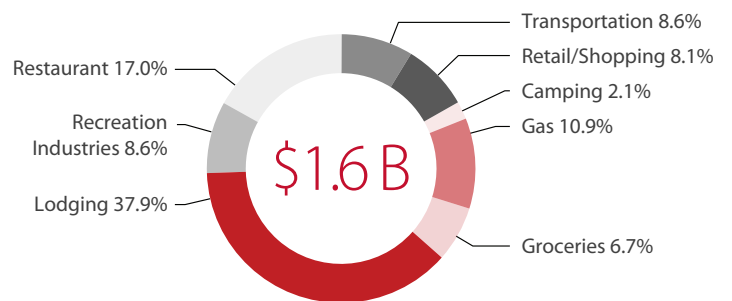
In 2021, Utah’s five national parks received a record 11.3 million recreation visits, a 45.0% increase from 2020 and a 5.5% increase from 2019 (Figure 13). Although 2021 reflected a significant “rebound-effect” following COVID-influenced park restrictions in 2020, recent data suggests that national park visitation began softening in late spring of 2022. In fact, during the first four months of 2022, national park visitation was up above 2019 baseline visitation, but in May, visitation dropped below baseline and summer park visitation continued to soften. By October 2022, park visitation regained some footing as gas prices continued to decrease (Figure 14).

Figure 11: Utah National Park Annual Visitor Spending, 2014-2021



Note: Includes Arches, Bryce Canyon, Canyonlands, Capitol Reef, and Zion National Parks. Source: National Park Service

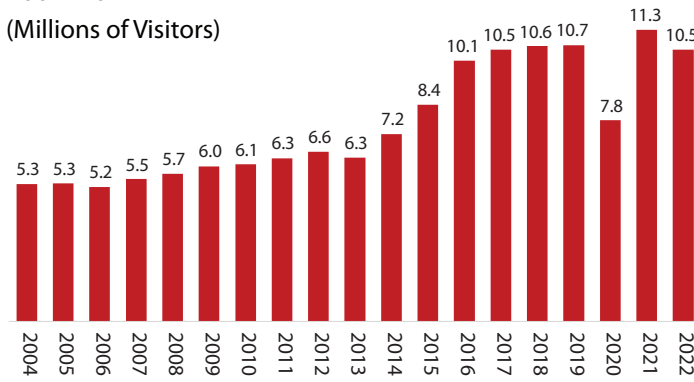
Figure 12: Utah National Park Visitor Spending by Spending Category, 2021



Note: Includes Arches, Bryce Canyon, Canyonlands, Capitol Reef, and Zion National Parks. Source: National Park Service

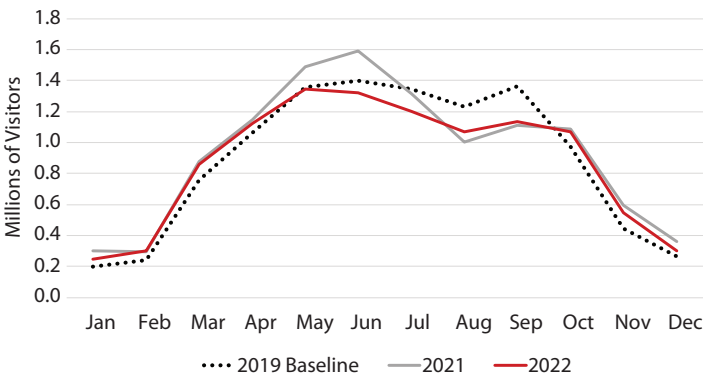
Figure 13: Utah National Park Recreation Visitation, 2004–2022

(Millions of Visitors)



Note: Includes Arches, Bryce Canyon, Canyonlands, Capitol Reef, and Zion National Parks. Source: Kem C. Gardner Policy Institute analysis of National Park Service data

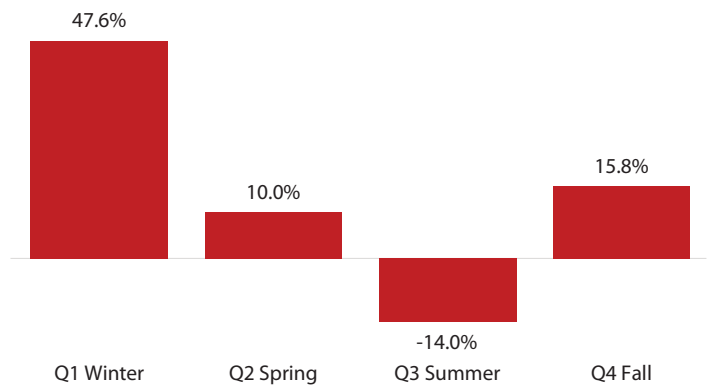
Figure 14: Utah National Park Recreation Visitation, 2021 and 2022 vs. 2019 Baseline



Note: Includes Arches, Bryce Canyon, Canyonlands, Capitol Reef, and Zion National Parks. Source: Kem C. Gardner Policy Institute analysis of National Park Service data

National park visitation patterns in 2021 deviated from previous years with increases during the winter and shoulder seasons (early spring/late fall) and decreases during the parks' typical high tourist season (summer). Figure 15 shows the significant differences in 2021 quarterly visitation patterns compared with those in 2019. Specifically, winter visitation was up 47.6%, while spring and fall visitation were up 10.0% and 15.8%, respectively. Summer visitation, on the other hand, was down 14.0%. This visitation shortfall during high tourist season was impacted by America's continued international travel ban, which was not lifted until November 8, 2021.

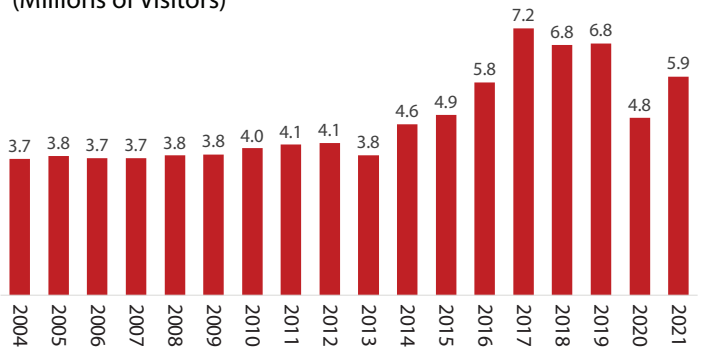
Figure 15: Year-Over Change in National Park Visitation by Quarter, 2021



Note: Includes Arches, Bryce Canyon, Canyonlands, Capitol Reef, and Zion National Parks. Source: Kem C. Gardner Policy Institute analysis of National Park Service data

Figure 16: Utah National Place Recreation Visitation, 2004-2021

(Millions of Visitors)



Note: Includes Arches, Bryce Canyon, Canyonlands, Capitol Reef, and Zion National Parks. Source: Kem C. Gardner Policy Institute analysis of National Park Service data

National park visitation in 2022 was lower than visitation in 2021 in every month except for February, August, and September. Annual 2022 national park visitation (10.5 million visitors) was down 6.7% from 2021 visitation (11.3 million visitors).

All five of Utah's national parks received more visitors in 2021 than in the two previous years, except for Bryce Canyon which experienced a 21.5% decline in visitation in 2021 compared to 2019, due in part to decreased international visitation (Table 3).

In addition to five national parks, Utah is home to 11 national places, nine of which track visitation data. Of these nine, Glen

Table 3: Utah National Park Recreation Visitation by Park, 2019-2021

Utah National Parks	2019	2020	2021	2020-2021	2019-2021
Arches NP	1,663,557	1,238,083	1,806,865	45.9%	8.6%
Bryce Canyon NP	2,679,478	1,464,655	2,104,600	43.7%	-21.5%
Canyonlands NP	739,449	493,914	911,594	84.6%	23.3%
Capitol Reef NP	1,227,627	981,038	1,405,353	43.3%	14.5%
Zion NP	4,320,033	3,591,254	5,039,835	40.3%	16.7%
Total National Park Visitors	10,630,144	7,768,944	11,268,247	45.0%	6.0%

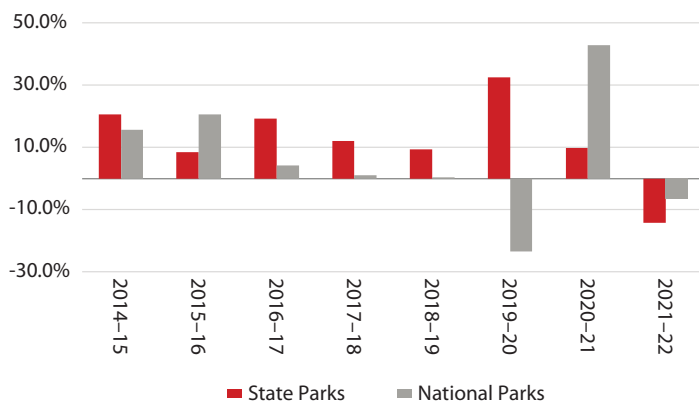
Source: Kem C. Gardner Policy Institute analysis of National Park Service data

Table 4: Utah National Place Recreation Visitation by Site, 2019-2021

Utah National Places	2019	2020	2021	2019-2021 % Change
Cedar Breaks NM	579,861	845,867	772,886	-8.6%
Dinosaur NM	298,965	264,145	359,560	36.1%
Glen Canyon NRA	4,330,563	2,553,392	3,144,318	23.1%
Golden Spike NHS	108,154	53,106	52,910	-0.4%
Grand Staircase-Escalante NM	1,118,102	959,234	1,371,036	42.9%
Hovenweep NM	35,400	19,856	26,710	34.5%
Natural Bridges NM	88,090	52,542	73,484	39.9%
Rainbow Bridge NM	115,108	3,573	3,290	-7.9%
Timpanogos NM	103,512	92,481	122,551	32.5%
Total National Place Visits	6,777,755	4,844,196	5,926,745	22.3%

Note: Flaming Gorge and Bears Ears visitation data not included.
 Source: Kem C. Gardner Policy Institute analysis of National Park Service and Bureau of Land Management data

Figure 17: Year-Over Change in Park Visitation, 2014-2022



Source: Kem C. Gardner Policy Institute analysis of National Park Service and Utah State Parks data

Canyon had the greatest visitation in 2021 (3.1 million), while Grand Staircase-Escalante experienced the largest year-over increase in visitation (42.9%) along with a record 1.4 million visitors. Conversely, Cedar Breaks was the only national place to experience a year-over decrease in visitation, down 8.6%, or 73,000 fewer visitors. Overall, Utah national place visitation increased 22.3% from 2020, but was still down 12.5% from baseline 2019 (Figure 16, Table 4).

In calendar year 2021, Utah state parks reported a record 11.6 million recreation visits with annual total visits increasing 9.8% from the previous year and 45.5% from baseline year 2019 (Table 5). As for year-over change, Sand Hollow experienced the greatest total visitation with a record 1.5 million visitors, including over 215,000 more visitors than the previous year. Dead Horse Point, however, welcomed close to 475,000 additional visitors in 2021, with a record of nearly 1.3 million visitors. Antelope Island and Snow Canyon came in second and third, adding 259,000 and 243,000 visitors in 2021, respectively. Willard Bay, Jordanelle, and Rockport reported the largest loss in visitors, ranging from a decline of over 150,000 visitors (Willard Bay and Jordanelle each) to a decline of 79,000 (Rockport).

Newly designated Point of the Mountain Sky Park in Utah County had the fastest year-over visitation growth at 388.2%.

Steinaker, Quail Creek, and Antelope Island all experienced over 100% two-year growth in visitation from 2019 to 2021, while Camp Floyd, Goosenecks, and Echo had the greatest percent declines. Sand Hollow in Washington County had the largest increase in visitation, welcoming over a half-million additional visitors (666,000) from 2019 to 2021.

Data show that both national park and state park visitation increased at similar rates in 2015, but have trended differently since, with state park popularity climbing rapidly in recent years (Figure 17).

Ski Industry

The winter of 2021-2022 was a banner season for Utah ski industry growth. Winter sports research firm RRC Associates reported that Utah’s ski industry set new records in 2021-2022 for both highest skier visitation in Utah (5.8 million) and highest total skier spending (\$2.35 billion) (Figures 18-19). This new skier spending record is \$800 million greater than 2019-2020 and nearly \$700 million greater than the previous record in 2018-2019. Unsurprisingly, per-visit skier spending was also the highest its ever been in 2021-2022 and experienced the greatest one-season leap in at least ten years. RRC Associates reported that the most common lodging types were short-term rentals (38%), followed by traditional commercial lodging (27%), and visitors staying with friends or family (17%) (Figure 20). Aside from Utah residents (38%), top domestic sources of nonresident visitors came from California (8.2%), New York (4.8%), and Florida (4.7%). International visitation was halved from 4.0% during the pre-pandemic 2019-2020 season to 2.0% during the 2021-2022 season, showing that international travel has yet to recover from the pandemic, but making Utah’s ski industry growth in 2021-2022 all the more impressive. Despite these increases in skier visitation and spending, first quarter 2022 private recreation employment data for Salt Lake, Summit,

Table 5: Utah State Park Visitation by Park, 2019-2021

Utah State Park Visitation	2019	2020	2021	2020-2021	2019-2021
Anasazi Indian Village State Park	19,477	14,235	21,639	52.0%	11.1%
Antelope Island State Park	528,866	815,445	1,074,570	31.8%	103.2%
Bear Lake State Park	458,343	638,798	603,297	-5.6%	31.6%
Camp Floyd - Stage Coach Inn State Park	16,933	6,278	7,968	26.9%	-52.9%
Coral Pink Sand Dunes State Park	128,559	177,655	252,624	42.2%	96.5%
Dead Horse Point State Park	978,380	792,099	1,265,221	59.7%	29.3%
Deer Creek State Park	433,856	707,836	688,619	-2.7%	58.7%
East Canyon State Park	159,883	252,272	190,084	-24.7%	18.9%
Echo State Park	55,488	77,726	44,513	-42.7%	-19.8%
Edge Of The Cedars State Park	12,733	5,195	12,401	138.7%	-2.6%
Escalante Petrified Forest State Park	66,731	57,669	86,047	49.2%	28.9%
Fred Hayes State Park at Starvation	NA	98,704	143,786	45.7%	0.0%
Fremont Indian State Park	32,490	45,317	52,422	15.7%	61.3%
Frontier State Park	12,385	8,276	14,668	77.2%	18.4%
Goblin Valley State Park	305,325	309,039	453,936	46.9%	48.7%
Goosenecks State Park	66,312	25,258	49,386	95.5%	-25.5%
Great Salt Lake Marina State Park	94,687	118,118	149,194	26.3%	57.6%
Green River State Park	82,336	84,413	120,653	42.9%	46.5%
Gunlock State Park	71,052	114,923	73,334	-36.2%	3.2%
Huntington State Park	36,804	63,789	55,579	-12.9%	51.0%
Hyrum State Park	109,971	146,846	139,554	-5.0%	26.9%
Jordan River OHV State Park	55,123	94,154	92,673	-1.6%	68.1%
Jordanelle State Park	652,705	977,252	821,720	-15.9%	25.9%
Kodachrome Basin State Park	132,201	150,146	199,555	32.9%	50.9%
Millsite State Park	13,347	17,633	19,388	10.0%	45.3%
Otter Creek State Park	38,222	54,732	50,946	-6.9%	33.3%
Palisade State Park	173,422	218,091	188,488	-13.6%	8.7%
Piute State Park	1,407	2,681	1,633	-39.1%	16.1%
Point of the Mountain Sky Park	NA	3,055	14,914	388.2%	0.0%
Quail Creek State Park	169,139	295,290	356,761	20.8%	110.9%
Red Fleet State Park	56,331	68,781	59,481	-13.5%	5.6%
Rockport State Park	153,245	253,103	173,965	-31.3%	13.5%
Sand Hollow State Park	864,751	1,315,668	1,531,295	16.4%	77.1%
Scofield State Park	28,250	46,863	32,287	-31.1%	14.3%
Snow Canyon State Park	509,347	597,883	841,529	40.8%	65.2%
Starvation State Park	112,752	66,631	NA	0.0%	0.0%
Steinaker State Park	16,686	47,260	42,737	-9.6%	156.1%
Territorial Statehouse State Park	10,118	3,803	11,214	194.9%	10.8%
Utah Field House Of Natural History State Park	57,382	45,995	70,644	53.6%	23.1%
Utah Lake State Park	150,475	266,967	246,631	-7.6%	63.9%
Wasatch Mountain State Park	360,274	476,968	529,133	10.9%	46.9%
Willard Bay State Park	645,382	881,287	723,142	-17.9%	12.0%
Yuba State Park	124,471	153,377	128,825	-16.0%	3.5%
Total	7,995,641	10,597,511	11,636,456	9.8%	45.5%

Note: Calendar year visitation; Flight Path State Recreation Area, Historic Union Pacific Rail Trail, and This is the Place Heritage Park visitation data are not included.

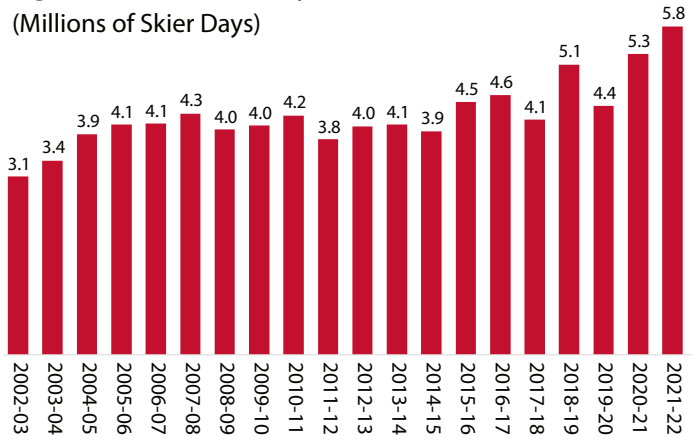
Source: Kem C. Gardner Policy Institute analysis of Utah State Parks data

and Weber counties shows a continued lag compared to earlier years, which puts pressure on ski resorts to fill their open positions (Figure 21).

Conferences & Conventions

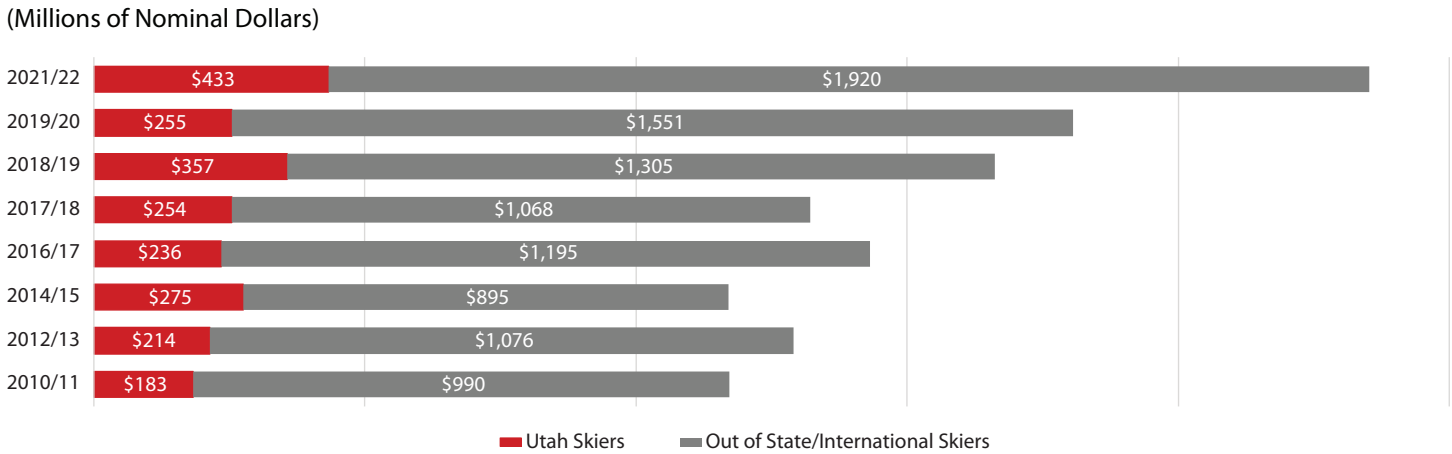
For Utah's conference and convention industry, 2021 was a year of recovery and building for the future. In their annual report, Visit Salt Lake showed that Salt Lake County's conference and convention sector either met or outperformed its goals for the year.¹ This included booking 716,710 hotel room nights, which outperformed their goal by 20,000 room nights. A combined total of 278,433 convention delegates, show and meeting attendees, and sporting/special event visitors spent an estimated \$115 million in Salt Lake County's economy—a 43.0% increase from 2020. Visit Salt Lake believes that rapid economic

Figure 18: Utah Skier Days, 2002/03–2021/22
(Millions of Skier Days)



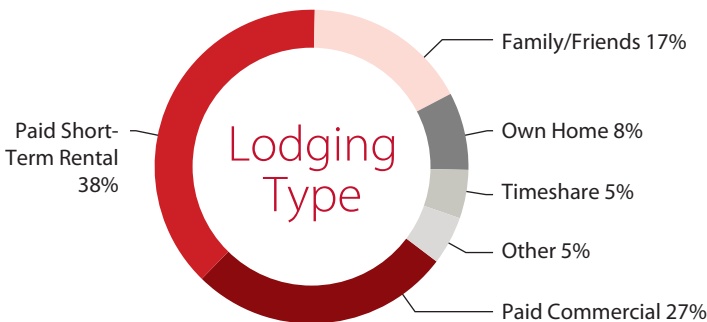
Source: Kem C. Gardner Policy Institute analysis of Ski Utah data

Figure 19: Utah Skier/Snowboarder Spending, 2010/11-2021/22
(Millions of Nominal Dollars)



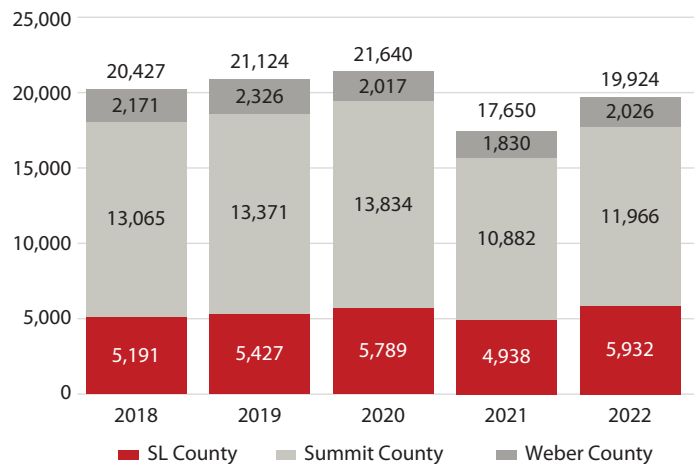
Note: Biennial RRC research changed to annual research beginning in 2016/17; research was halted in 2020/21 due to COVID pandemic.
Source: RRC Associates

Figure 20: Skier/Snowboarder Accommodations Share by Lodging Type, 2021-2022 Season



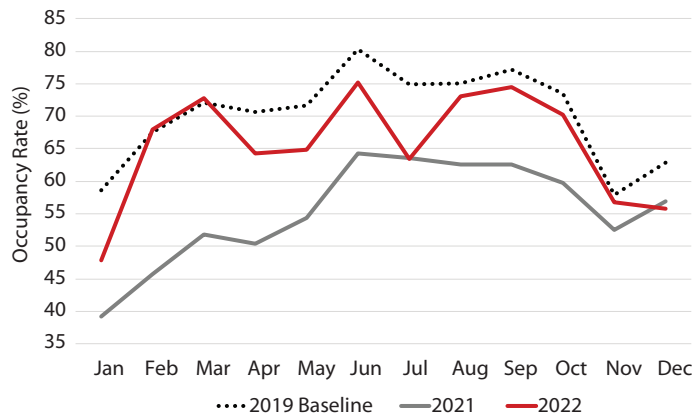
Source: RRC Associates

Figure 21: Private Recreation-Related Jobs, Salt Lake and Summit Counties, Winter 2018-2022



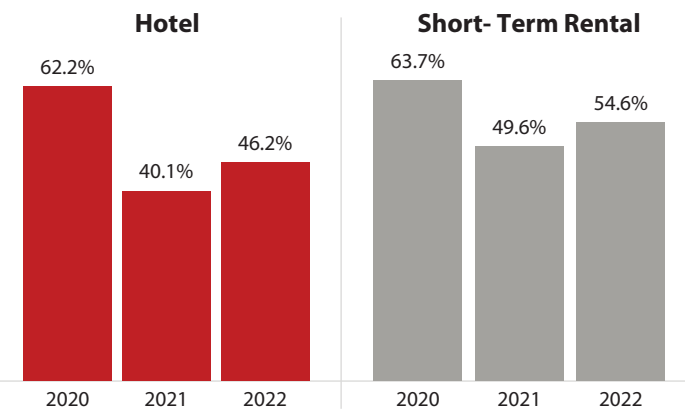
Note: First quarter (Jan-Mar) jobs only; jobs include full- and part-time private employment; self-proprietors are not included; Summit County jobs include leisure and hospitality sector; SL and Weber Counties include recreation jobs only.
Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics data

Figure 22: Downtown Salt Lake City Hotel Occupancy, 2021 and 2022 vs. 2019 Baseline



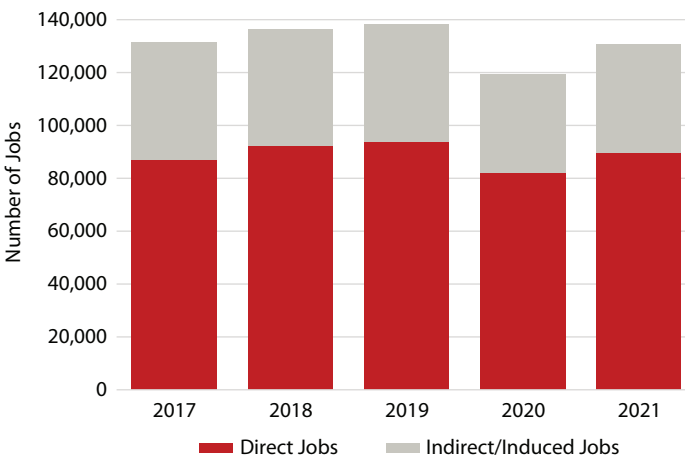
Source: Kem C. Gardner Policy Institute analysis of Ski Utah data

Figure 23: Summit County Hotel Occupancy Rates, Sundance Film Festival, 2020-2022



Note: Bars represent years 2020-2022, left to right, for each type of accommodation. Source: Kem C. Gardner Policy Institute analysis of Transparent and STR, Inc., data. Republication or other re-use of this data without the express written permission of STR is strictly prohibited.

Figure 24: Utah Travel and Tourism Jobs, 2017-2021



Note: Includes public and private full- and part-time jobs; includes proprietors. Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics and U.S. Bureau of Economic Analyses data

recovery for this sector will be further aided by the Salt Palace Convention Center's hotel, the Hyatt Regency, which opened its doors in October 2022. This 26-story, 700-room tower will allow Visit Salt Lake to secure more, and larger, future events. In addition, downtown Salt Lake City hotel occupancy, which was still down 21.2% from baseline in 2021, was only 6.6% below baseline in 2022 (Figure 22).

Sundance Film Festival

Each January, Park City's Sundance Film Festival draws a large number of out-of-state visitors to Utah. Between 2017 and 2020, Y² Analytics conducted Sundance Film Festival economic impact studies. In 2021 and 2022, the festival transitioned from an in-person event to a virtual event due to a nationwide surge in COVID cases both winters. Figure 23 compares Summit County occupancy rates by festival day for 2020, 2021, and 2022. The average hotel occupancy rate for the first week of the 2020 in-person festival was 62.2% followed by a lower 46.2% and 49.9% in subsequent years, which was likely influenced by its virtual format. Summit County short-term rental data demonstrates a similar downward trend in occupancy rates. Short-term rental occupancy during the first week of the 2020 in-person film festival was 63.7%, followed by 49.6% and 54.6%, in subsequent years. In January 2023, the Sundance Film Festival offered a hybrid festival model with films shown both in person and online.

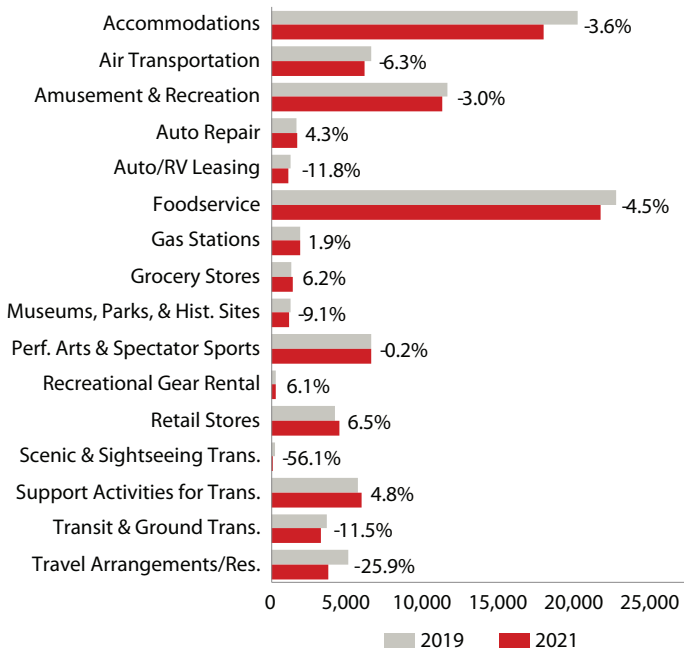
Travel & Tourism Employment

Utah's travel and tourism industry provided 89,600 jobs in Utah in 2021. The industry's economic activity led to indirect and induced effects, supporting an additional 41,000 jobs. About 5.9% of Utah jobs were supported by visitor spending in 2021, either directly or indirectly.

In 2021, the three tourism-related sectors that rebounded the most from 2019 were retail (6.5%), grocery stores (6.2%), and recreational gear rental (6.1%) (Figure 25). The support activities for transportation and retail sectors reported the greatest increases above 2019 (each adding around 270 jobs on net), followed by grocery stores (around 80 jobs on net). Conversely, accommodations jobs were still down 2,200 jobs from baseline 2019, followed by travel arrangements and reservations (down 1,300 jobs), and foodservice (down 1,000 jobs).

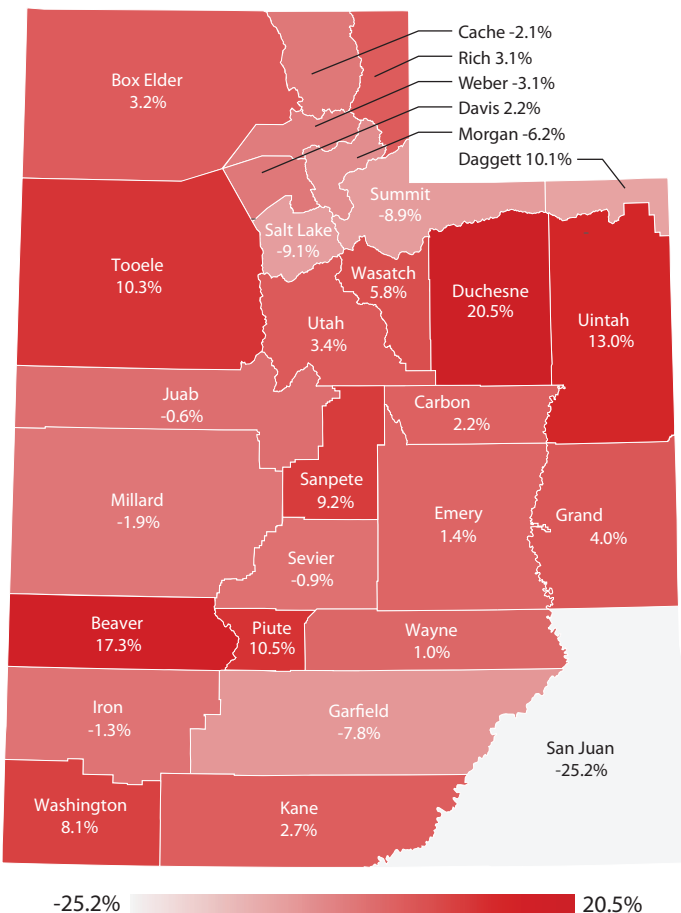
In 2021, private leisure and hospitality jobs increased in every county in Utah, except Rich and Morgan counties, from 2020. However, when compared to baseline 2019, 13 of Utah's 29 counties still lagged below baseline. Salt Lake County suffered the greatest leisure and hospitality job loss, followed by Summit County, and Weber County (Figure 26). The top three counties that added the most leisure and hospitality jobs were Washington, Utah, and Tooele.

Figure 25: Direct Travel & Tourism Jobs by Job Type, 2021 vs. 2019



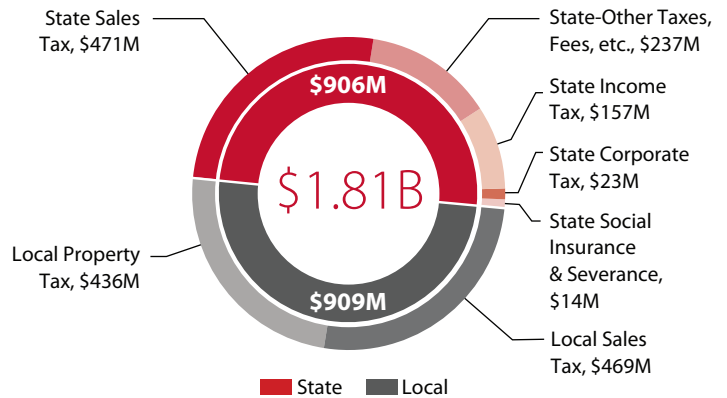
Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics and Utah Department of Workforce Services data

Figure 26: Percent Change in Private Leisure & Hospitality Jobs, 2019-2021



Note: Includes full- and part-time private employment; does not include proprietors. Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics data

Figure 27: Total Travel and Tourism-Generated Tax Revenue by Tax Type, 2021



Note: Includes economic multiplier effects. Source: Kem C. Gardner Policy Institute analysis of Tourism Economics and Utah Tax Commission data

Tax Revenue

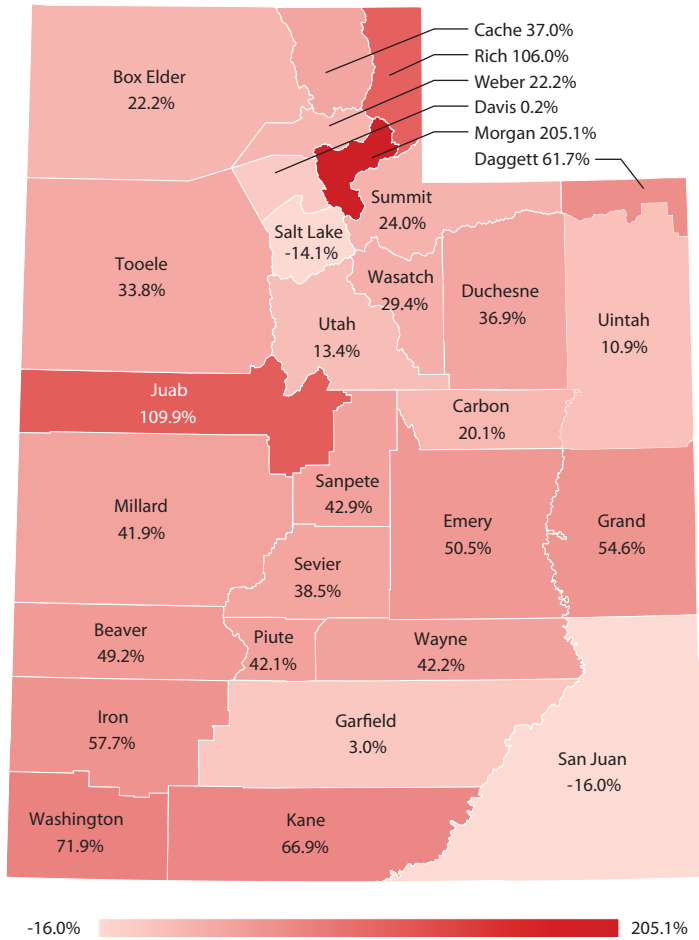
In 2021, direct visitor spending totaled \$10.56 billion. This led to an estimated additional \$9.12 billion in indirect and induced spending effects. Together, this economic activity generated an estimated \$1.81 billion in state and local tax revenues, up nearly 55.9% from pandemic-impacted 2020 and 27.9% from pre-pandemic 2019 (Figure 27). Estimated revenue growth rates exceed visitor spending growth rates due to sales and excise tax rate increases during this time period, as well as very high-income tax and property tax growth.

County transient room tax (TRT) revenue surpassed 2019 baseline levels in 2021. In fact, 28 out of 29 counties had increases in TRT from 2020, and all 29 counties except Piute County experienced TRT increases from 2019. On a countywide basis, Washington County experienced the largest two-year increase in TRT dollars at \$6.4 million. This was followed by Grand County (\$5.7 million), Summit County (\$2.7 million), and Kane County (\$2.1 million). Salt Lake County experienced the greatest shortfall from 2019, collecting \$3.0 million less in 2021 TRT, followed by San Juan County, which experienced a \$200,000 shortfall from 2019 (Figures 28-29).

Hotel Occupancy & Rates

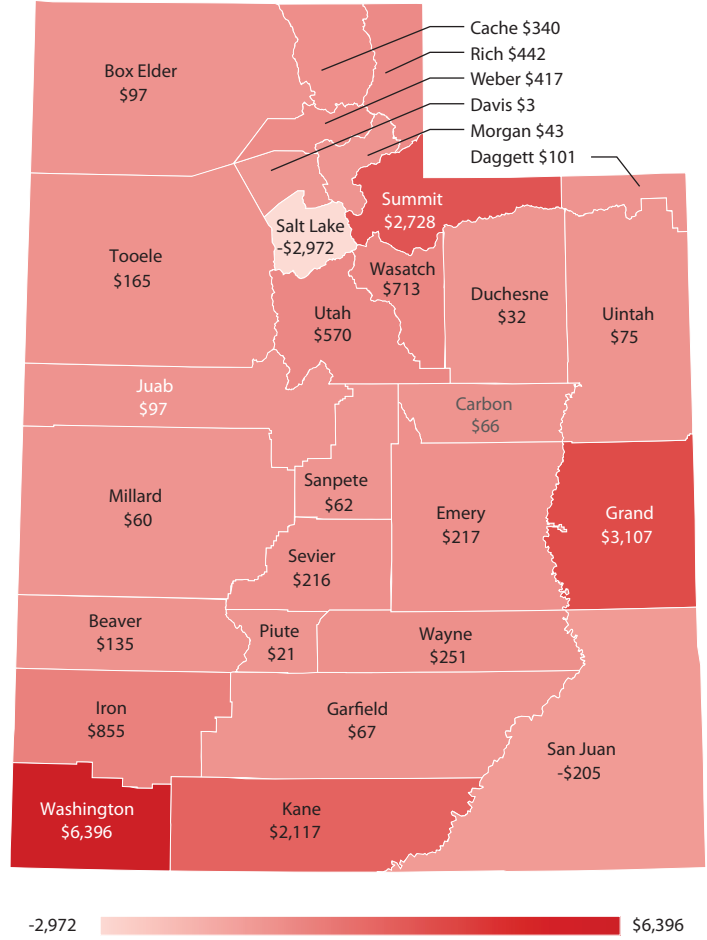
The average annual statewide hotel occupancy rate in 2021 (61.8%) was up 32.3% from 2020 (46.7%), but still down 2.6% from 2019 (63.4%). Over the past year and a half, statewide hotel occupancy was at its highest point in June 2021 at 74.6%, up 40.3% from June 2020 and up 1.2% from June 2019. Overall, Utah hotel occupancy rates returned to baseline beginning in March 2021 and have hovered near baseline ever since, with the exception of a few drops in occupancy during fall 2021 and winter 2022 due to COVID variant surges in the U.S. In addition, hotel occupancy rates dropped slightly below baseline 2019 rates in June and July of 2022 (Figure 30).

Figure 28: Percent Change in County Transient Room Tax Revenue by County, 2019-2021



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

Figure 29: County Transient Room Tax Revenue Gains, 2019-2021
(In Thousands of Dollars)

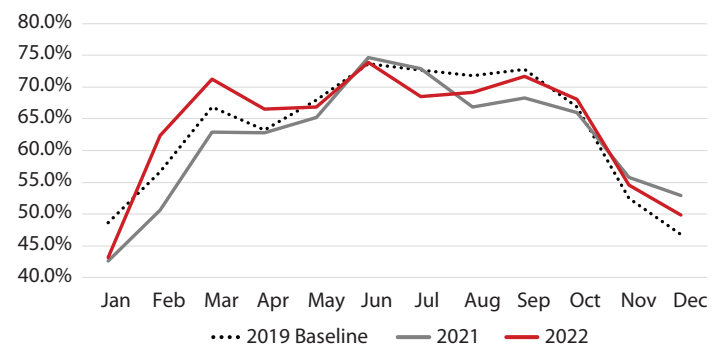


Source: Kem C. Gardner Policy Institute analysis of Utah State Tax Commission data.

In 2021, Weber County had the highest average annual occupancy rate (71.4%) and Wasatch County had the lowest (47.9%). When compared to 2019 baseline, Beaver County had the greatest increase in hotel occupancy rate (22.7%), followed by Uintah (18.6%), and Sevier (15.9%). On the other hand, Wasatch County had the greatest decline in occupancy (down 13.8%), followed by Garfield-San Juan-Wayne (down 13.5%), and Salt Lake County (down 10.2%).

Average daily hotel room rates (ADR) experienced significant increases in 2021 and were up 23.5% from 2020 and 3.9% from 2019. Summit County had the highest average annual ADR of \$304 (compared with \$270 in 2020) and Beaver County had the lowest (\$78) (Figure 31). Of the 23 counties that reported ADR, 21 counties had two-year increases between 2019 and 2021 (Figure 32). Salt Lake County's ADR, however, was still down 11.6% and Tooele County's was still down 0.4%—more or less flat—from 2019 baseline. Cache and Rich Counties, together, experienced the greatest percent increase from 2019-2021 at 78.3%, an ADR increase from \$58.59 to \$104.44 in two

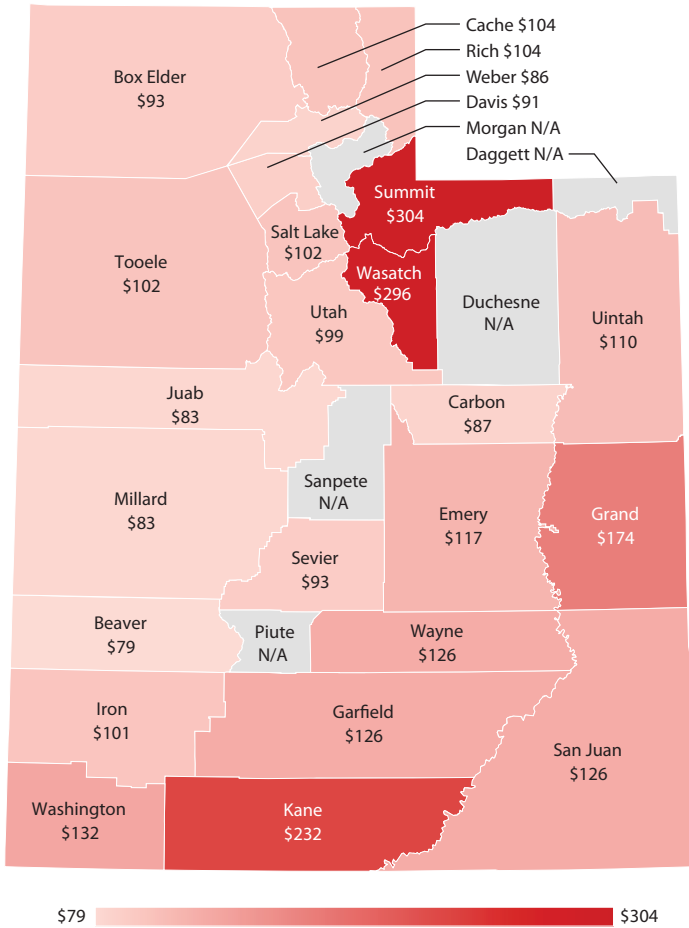
Figure 30: Statewide Hotel Occupancy, 2021 and 2022 vs. 2019 Baseline



Source: Kem C. Gardner Policy Institute analysis of STR, Inc. data
 Republication or other re-use of this data without the express written permission of STR is strictly prohibited.

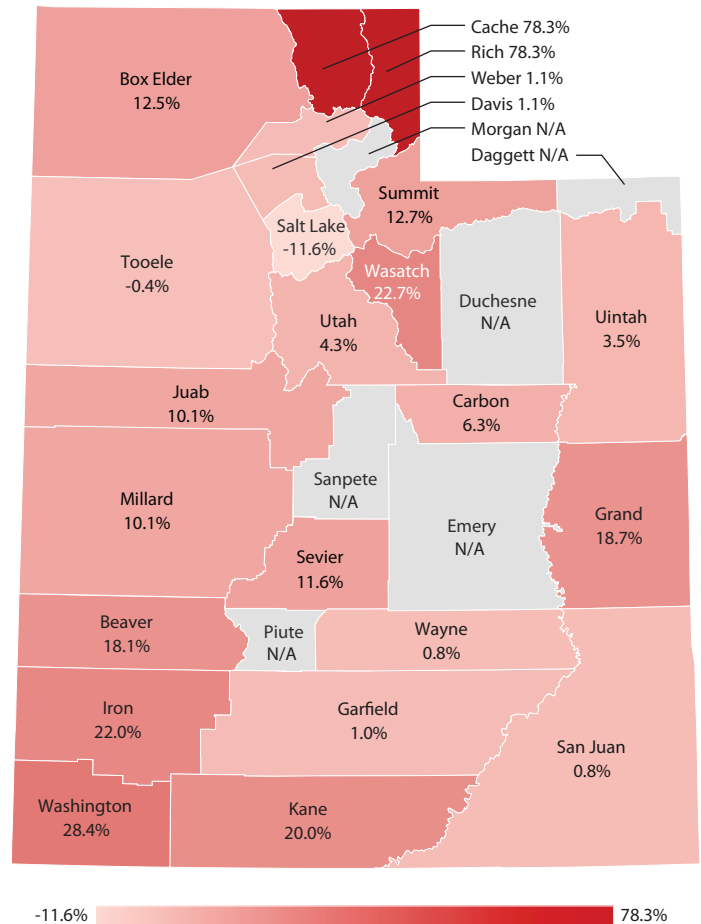
years. Dollar-wise, the largest ADR dollar increase took place in Wasatch County where the average annual ADR grew by \$54.86 per day from 2019-2021.

Figure 31: Average Daily Room Rate (ADR) by County, 2021



Note: No data exists for counties shaded light grey.
 Source: Kem C. Gardner Policy Institute analysis of STR, Inc. data
 Republication or other re-use of this data without the express written permission of STR is strictly prohibited.

Figure 32: Percent Change in Average Daily Room Rate by County, 2019–2021



Note: No data exists for counties shaded light grey.
 Source: Kem C. Gardner Policy Institute analysis of STR, Inc. data
 Republication or other re-use of this data without the express written permission of STR is strictly prohibited.

Short-Term Rentals

Over the past 10 to 15 years, short-term rentals have become popular lodging alternatives to hotels. With the rise of the internet, online marketplaces like Airbnb, HomeAway, and VRBO have allowed property owners from across the globe to advertise their rental properties to a worldwide audience. Vacation rental online marketplaces allow prospective guests to choose from a variety of rental listing types, including private rooms, apartments, entire houses, villas, RVs, and even tent spaces. Guests can reserve and pay for their rental online, including all fees and taxes. In Utah, the majority of short-term rentals are private homes (41%), followed by apartments (38%), and townhouses (12%) (Figure 33).

According to short-term rental research firm, Transparent, there were an average of 16,172 available short-term rentals statewide in 2019 and 22,918 in 2022—a 41.7% increase in four years.² Figure 33 shows percent growth in short-term rental listings by county from 2019-2022; Figure 34 shows the percent

change in short-term rental listings by county for the same time period. The average number of short-term rental listings increased in every Utah county but San Juan (down 7.4%) and Morgan (down 1.6%) from 2019 to 2022.

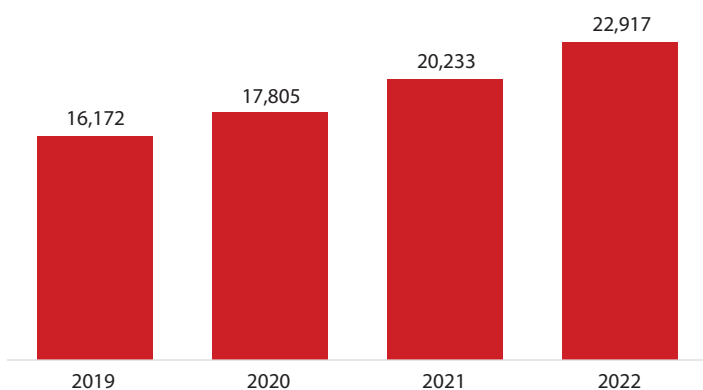
It is important to note that Utah’s short-term rental capacity has increased significantly from 2019 to 2022 (47.9%)—more than 10x the increase of Utah’s hotel capacity (4.2%) (Figure 35). However, there is a chance that the short-term rental market in Utah has hit saturation. While short-term rental occupancy has been rising despite capacity increases, beginning in 2022, occupancy began to decline. Conversely, and at the same time, hotel occupancy, which had been declining, began increasing once again (Figure 36). Over the next few years, the capacity and occupancy rates of short-term rentals could continue to change as more local governments enact rules and regulations for short-term rentals due to their potential impacts on local resident housing supply and housing affordability.

Figure 33: Utah Short-Term Rental Supply by Listing Type, 2022



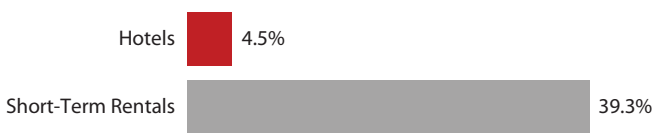
Note: Includes Airbnb, HomeAway, and VRBO rentals; represents average number of January and July listings; "Bed and Breakfast," "Dorm," and "Other" listing types have been omitted. Source: Kem C. Gardner Policy Institute analysis of Transparent data

Figure 34: Utah's Short-Term Rental Supply, 2019-2022



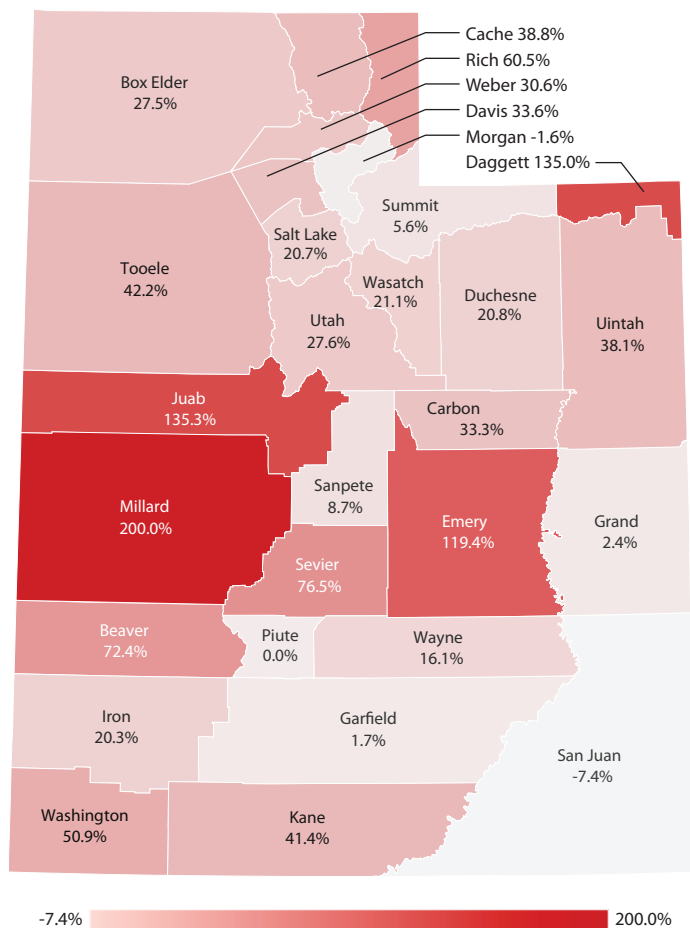
Note: Includes Airbnb, HomeAway, and VRBO rentals; represents average number of January and July listings; "Bed and Breakfast," "Dorm," and "Other" listing types have been omitted. Source: Kem C. Gardner Policy Institute analysis of Transparent data

Figure 36: Percent Change in Utah Accommodation Capacity by Type, 2019-2022



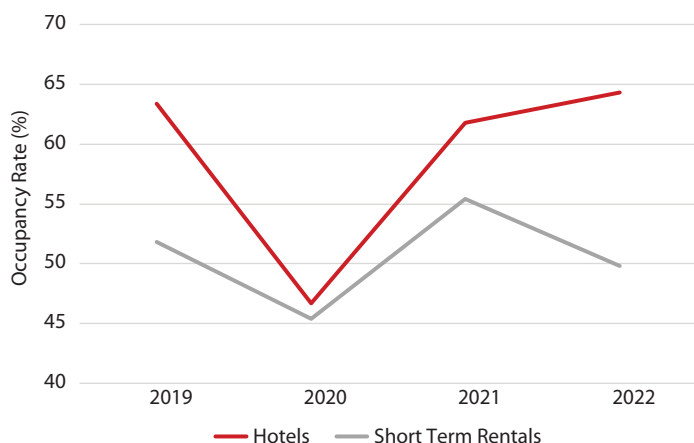
Source: Kem C. Gardner Policy Institute analysis of STR, Inc., and Transparent data. Republication or other re-use of this data without the express written permission of STR is strictly prohibited.

Figure 35: Percent Change in Short-Term Rental Listings by County, 2019-2022



Note: Includes Airbnb, HomeAway, and VRBO rentals; represents average number of January and July listings; "Bed and Breakfast," "Dorm," and "Other" listing types have been omitted. Source: Kem C. Gardner Policy Institute analysis of Transparent data

Figure 37: Utah Hotel and Short-Term Rental Occupancy Rates, 2019-2022



Note: Short-term rental subtypes listed as "Bed & Breakfast," "Dorm," and "Other" have been omitted. Source: Kem C. Gardner Policy Institute analysis of STR, Inc. and Transparent data. Republication or other re-use of this data without the express written permission of STR is strictly prohibited.

Travel & Tourism Industry — Other Indicators

In 2021, passenger airline jobs and wages still lagged below 2019 baseline. In Utah's arts, entertainment, and recreation sector, jobs returned to baseline and wages were up in both the private (5.1%) and public sectors (7.7%) compared to 2019; taxable sales were also up 11.3%. Meanwhile, the accommodations sector made strides in jobs, wages, and sales

from 2020 to 2021; however, jobs and wages in this sector continued to lag compared with baseline 2019 even though taxable sales were up nearly 20.0%. Foodservice jobs nearly rebounded to pre-pandemic numbers (down 0.9%) while wages and sales in this sector were up 15.2% and 19.3%, respectively, from 2019 (Tables 6-9).

Table 6: Utah's Passenger Air Industry, 2017–2021

Year	Total Deplaned Passengers	Annual Change	Employment	Annual Change	Wages (Millions)	Annual Change
2017	12,100,265	4.6%	6,704	7.2%	\$561	6.4%
2018	12,777,748	5.6%	6,868	2.4%	\$619	10.5%
2019	13,413,771	5.0%	7,416	8.0%	\$723	16.7%
2020	6,273,574	-53.2%	6,599	-11.0%	\$689	-4.7%
2021	11,197,049	78.5%	7,281	10.3%	\$627	-9.0%

Note: includes full- and part-time employment; does not include proprietors.

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

Table 7: Utah's Arts, Entertainment, and Recreation Industry, 2019–2021

Year	2019	2020	2021	2020-2021	2019-2021
Private Employment	25,892	20,934	25,805	23.3%	-0.3%
Private Wages (\$Millions)	\$756	\$669	\$794	18.7%	5.1%
Public Employment	7,721	6,510	7,175	10.2%	-7.1%
Public Wages (\$Millions)	\$130	\$131	\$140	7.2%	7.7%
Taxable Sales (\$Millions)	\$988	\$732	\$1,100	50.2%	11.3%

Note: includes full- and part-time employment; does not include proprietors.

Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics and Utah State Tax Commission data

Table 8: Utah's Accommodations Industry, 2019–2021

Year	2019	2020	2021	2020-2021	2019-2021
Employment	21,879	16,987	18,622	9.6%	-14.9%
Wages (Millions)	\$613	\$471	\$575	22.0%	-6.2%
Taxable Sales (Millions)	\$2,183	\$1,627	\$2,617	60.8%	19.9%

Note: includes full- and part-time employment; does not include proprietors.

Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics and Utah State Tax Commission data

Table 9: Utah's Food Services Industry, 2019–2021

Year	2019	2020	2021	2020-2021	2019-2021
Employment	105,607	95,551	104,610	9.5%	-0.9%
Wages (Millions)	\$1,848	\$1,740	\$2,129	22.4%	15.2%
Taxable Sales (Millions)	\$5,475	\$5,009	\$6,534	30.4%	19.3%

Note: includes full- and part-time employment; does not include proprietors.

Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics and Utah State Tax Commission data

Research Methods

This section provides insight regarding how the Gardner Institute conducted its analysis. The Institute defines key terms for conceptual clarity and to explain economic impact and tax revenue modeling in this report.

Terms

Employment is a measure of the average number of full-time and part-time jobs. Employment figures in this report include full- and part-time private and public jobs, and include self-employment, unless noted otherwise. An **industry** is a category for grouping similar types of companies. For uniformity, government agencies and researchers in the U.S. follow the North American Industry Classification System (NAICS), which federal agencies periodically update as new types of companies become common enough to warrant a new category. However, the **travel & tourism industry** is not one distinct industry but rather an assortment of industries, comprised of goods and services purchased prior to, during, and even after a trip. The travel and tourism industry can be characterized as an export industry when travel-related goods and services are purchased in Utah by nonresident visitors.

Leisure and Hospitality Employment. The leisure and hospitality employment sector, as per the U.S. Bureau of Labor Statistics, comprises the arts, entertainment, recreation, accommodation, and foodservice industries (e.g. NAICS 711–722). Statewide, around 65% of all travel and tourism–related jobs are in the leisure and hospitality sector, while the other 35% are in several different sectors (e.g. transportation, real estate, rental and leasing, retail, personal services, etc.).

Traveler Types. Utah visitors are divided into two categories: **residents** and **nonresidents**. Resident travelers are Utahns who travel at least 50 miles away from home (one-way) for work or leisure either for a day trip or overnight stay. Nonresident travelers comprise both **domestic** and **international** travelers. Domestic nonresident visitors are American travelers who are not Utah residents, and international visitors include all travelers from outside of the U.S.

Modeling Economic and Fiscal Impacts

The travel and tourism industry supports individuals and businesses in many different industries. Total economic impacts include direct, indirect, and induced impacts. When Utah visitors purchase from Utah businesses, these are the direct effects, including the employees and earnings that are supported by these purchases. These businesses purchase inputs from other local businesses, who in turn may purchase from other local businesses. These rounds of activity produce indirect employment and earnings effects. Then, direct and indirect employees spend a portion of their earnings in the local economy, spurring additional “induced” effects. In the tourism industry, a direct spending example would be a visitor paying their hotel bill. Indirect spending would be the hotel owner purchasing bed sheets from an in-state linen company. Induced spending would include hotel employees and linen company employees spending their paychecks on personal purchases (e.g. rent, groceries, health care, etc.).

Tourism Economics provided the Utah Office of Tourism with direct spending numbers. To estimate the indirect and induced impacts that resulted from this direct activity, the Institute customized a travel and tourism economic impact model for Utah. This customized model utilizes 2021 IMPLAN economic impact software as well as U.S. Bureau of Labor Statistics and U.S. Bureau of Economic Analysis data.

To estimate fiscal impacts, the Gardner Institute utilizes IMPLAN economic modeling software along with a customized Institute fiscal impacts calculator. The Institute’s fiscal calculator uses effective tax rates and Utah State Tax Commission data to estimate the fiscal impacts related to the travel and tourism industry.

The Gardner Institute estimated tax revenue impacts for state and local sales taxes, personal and corporate income taxes, local property taxes, and other state taxes and fees (e.g. travel and tourism portion of fuel tax revenue, boat registration fees, alcohol and tobacco taxes, etc.). The Institute limited its model to state and local governments because Utah federal tax collections have a relatively small impact on federal government receipts. Similarly, the Institute assumed federal spending in the state in a given year is largely independent of economic activity in Utah’s industries, including the travel and tourism–related industries.

References

- Bureau of Land Management. 2022. Visits and Visitor Days by Regional Management Areas (GSENM), Fiscal Year Range October 1, 2020, to September 30, 2021 (RMIS).
- Hyatt Regency Opens 700-room Salt Lake City Hotel. October 21, 2022. Business Traveler. <https://www.businessstraveller.com/business-travel/2022/10/21/hyatt-regency-opens-700-room-salt-lake-city-hotel/>
- Omnitrak. September 2022. Utah Visitor Profile and Insights Report.
- STR, Inc. 2022 Utah Hotel & Lodging Reports: January 2019–September 2022.
- Tourism Economics, An Oxford Economics Company. September 2022. International State Travel: Summary of International Travel to the U.S.
- Tourism Economics, An Oxford Economics Company. August 2022. Travelers Direct Spending in Utah, 2016-2021.
- Transparent. 2019–2022. Short-term Rental Data. Bi-Monthly Download.
- U.S. Bureau of Economic Analysis. 2022. Regional Data: GDP and Personal Income. Annual Gross Domestic Product by State. <https://www.bea.gov/itable/regional-gdp-and-personal-income/>
- U.S. Bureau of Labor Statistics. 2022. Databases, Tables & Calculators by Subject: State and County Employment and Wages (QCEW). <https://www.bls.gov/data/>
- U.S. National Park Service. 2022. 2021 National Park Spending Effects: Economic Contributions to Local Communities, States, and the Nation. <https://www.nps.gov/subjects/socialscience/vse.htm>
- U.S. National Park Service. 2022. Visitor Use Statistics. Retrieved from <https://irma.nps.gov/Stats/>
- U.S. Travel Association. May 2022. U.S. Travel Answer Sheet and Inbound International Travel Fact Sheet. <https://www.ustravel.org/research/travel-facts-and-figures>
- U.S. Travel Association. June 2022. US Travel Spending, Visitor Volume, and Travel Price Index Tables. https://www.ustravel.org/sites/default/files/2022-06/us_travel-forecast_summer2022.pdf
- Utah Department of Workforce Services. 2022. Utah Economic Data Viewer - Employment and Wages. <https://jobs.utah.gov/jsp/utalmis/#/industry>
- Utah Office of Tourism. 2022. Utah Tourism Industry Metrics. <https://travel.utah.gov/research-planning/utah-tourism-industry-metrics>
- Utah skier visits up 10% last year—sets new record. June 14, 2022. Townlift. <https://townlift.com/2022/06/utah-skier-visits-increased-10-last-season-sets-new-record/>.
- Utah State Parks. October 2022. Resources: Park Visitation. <https://stateparks.utah.gov/resources/park-visitation-data/>
- Utah State Tax Commission. 2022. Annual Report: 2021 Fiscal Year. <https://tax.utah.gov/commission/reports/fy21report.pdf>
- Visit Salt Lake. 2021 Annual Report: A Year That Was West of Conventional. https://assets.simpleviewinc.com/simpleview/image/upload/v1/clients/saltlake/2020_Annual_Report_WEB_c9faeec2-e33f-494a-b38b-0f4de4ac9870.pdf
- Y² Analytics. Economic Impact: 2020 Sundance Film Festival. <https://www.sundance.org/pdf/2020%20Sundance%20Film%20Festival%20Economic%20Impact%20Report.pdf>
- Y² Analytics. Economic Impact: 2019 Sundance Film Festival. <https://www.sundance.org/pdf/sff19-economic-impact-report.pdf>
- Y² Analytics. Economic Impact: 2018 Sundance Film Festival. <http://www.sundance.org/pdf/festival-info/sff18-economic-impact-report.pdf>
- Y² Analytics. Economic Impact: 2017 Sundance Film Festival. <https://www.sundance.org/pdf/festival-info/sff17-economic-impact-report.pdf>

Endnote

- 1 Visit Salt Lake. 2021 Annual Report: A Year That Was West of Conventional. https://assets.simpleviewinc.com/simpleview/image/upload/v1/clients/salt-lake/2020_Annual_Report_WEB_c9faeec2-e33f-494a-b38b-0f4de4ac9870.pdf
2. The average number of short-term rental listings is the average of January and July listings in each year.

Partners in the Community

The following individuals and entities help support the research mission of the Kem C. Gardner Policy Institute.

Legacy Partners

The Gardner Company
 Christian and Marie Gardner Family
 Intermountain Healthcare
 Clark and Christine Ivory Foundation
 KSL and Deseret News
 Larry H. & Gail Miller Family Foundation
 Mountain America Credit Union
 Salt Lake City Corporation
 Salt Lake County
 University of Utah Health
 Utah Governor's Office of Economic Opportunity
 WCF Insurance
 Zions Bank

Executive Partners

Mark and Karen Bouchard
 The Boyer Company
 Clyde Companies
 Salt Lake Chamber

Sustaining Partners

Dominion Energy
 Staker Parson Materials and Construction
 Wells Fargo

Kem C. Gardner Policy Institute Advisory Board

Conveners

Michael O. Leavitt
 Mitt Romney

Board

Scott Anderson, Co-Chair
 Gail Miller, Co-Chair
 Doug Anderson
 Deborah Bayle
 Roger Boyer
 Michelle Camacho
 Wilford Clyde
 Sophia M. DiCaro

Cameron Diehl
 Lisa Eccles
 Spencer P. Eccles
 Christian Gardner
 Kem C. Gardner
 Kimberly Gardner
 Natalie Gochnour
 Brandy Grace
 Rachel Hayes
 Clark Ivory
 Mike S. Leavitt
 Derek Miller
 Ann Millner

Sterling Nielsen
 Jason Perry
 Ray Pickup
 Gary B. Porter
 Taylor Randall
 Jill Remington Love
 Brad Rencher
 Josh Romney
 Charles W. Sorenson
 James Lee Sorenson
 Vicki Varela

Ex Officio (invited)

Governor Spencer Cox
 Speaker Brad Wilson
 Senate President
 Stuart Adams
 Representative Brian King
 Senator Karen Mayne
 Mayor Jenny Wilson
 Mayor Erin Mendenhall

Kem C. Gardner Policy Institute Staff and Advisors

Leadership Team

Natalie Gochnour, Associate Dean and Director
 Jennifer Robinson, Chief of Staff
 Mallory Bateman, Director of Demographic Research
 Phil Dean, Chief Economist and Senior Research Fellow
 Shelley Kruger, Accounting and Finance Manager
 Colleen Larson, Administrative Manager
 Nate Lloyd, Director of Economic Research
 Dianne Meppen, Director of Community Research
 Laura Summers, Director of Industry Research
 Nicholas Thiriot, Communications Director
 James A. Wood, Ivory-Boyer Senior Fellow

Staff

Eric Albers, Public Policy Analyst
 Samantha Ball, Senior Research Associate
 Max Becker, Public Policy Analyst
 Andrea Thomas Brandley, Senior Education Analyst
 Kara Ann Byrne, Senior Research Associate
 Mike Christensen, Scholar-in-Residence
 Nate Christensen, Research Economist
 Dejan Eskic, Senior Research Fellow and Scholar
 Enas Farag, Research Assistant
 Emily Harris, Senior Demographer
 Michael T. Hogue, Senior Research Statistician
 Mike Hollingshaus, Senior Demographer
 Thomas Holst, Senior Energy Analyst
 Jennifer Leaver, Senior Tourism Analyst

Levi Pace, Senior Research Economist
 Praopan Pratoomchat, Senior Research Economist
 Heidi Prior, Public Policy Analyst
 Natalie Roney, Research Economist
 Shannon Simonsen, Research Coordinator
 Paul Springer, Senior Graphic Designer

Faculty Advisors

Matt Burbank, College of Social and Behavioral Science
 Elena Patel, David Eccles School of Business
 Nathan Seegert, David Eccles School of Business

Senior Advisors

Jonathan Ball, Office of the Legislative Fiscal Analyst
 Silvia Castro, Suazo Business Center
 Gary Cornia, Marriott School of Business
 Wes Curtis, Community-at-Large
 John C. Downen, Camoin Associates
 Dan Griffiths, Community-at-Large
 Emma Houston, University of Utah
 Beth Jarosz, Population Reference Bureau
 Darin Mellott, CBRE
 Pamela S. Perlich, University of Utah
 Chris Redgrave, Community-at-Large
 Wesley Smith, Northbound Strategy
 Juliette Tennert, Community-at-Large