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The State of Utah's Travel and Tourism Industry 2019

Travel and tourism is one of Utah's top ten industries, supporting one in 11 Utah jobs and generating over a billion dollars in state and local tax revenue annually.

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The State of Utah's Travel and Tourism Industry, 2019

Analysis in Brief

Domestic and international travelers and tourists visit Utah year-round to participate in a wide range of activities. Since 2015, visitor spending in Utah's economy has increased by an average 5.1% annually. In 2019, travelers directly spent a record \$10.06 billion in Utah, generating an estimated 141,500 total Utah jobs, and \$1.34 billion in state and local tax revenue. Utah's national parks and state parks experienced record visitation in 2019 as well.

This report presents a high-level review of Utah's travel and tourism industry for 2019. It captures visitor spending and visitation trends, employment and wages, fiscal impacts, lodging data, and a snapshot of general tourism industry indicators. This report also recaps 2019 travel and tourism news events and provides an industry outlook, including a discussion regarding COVID-19's impact on the travel and tourism industry in 2020 and beyond.

Key Points include the following:

- **Spending** – Visitors directly spent a record \$10.06 billion in the Utah economy in 2019, a 3.3% year-over-year increase.
- **Jobs** – Utah's travel and tourism industry accounted for an estimated 141,500 total jobs in 2019, a 4.0% year-over-year increase. Approximately 1 in 11 Utah jobs is supported by visitor spending, either directly or indirectly.
- **Tax Revenue** – The \$10.06 billion in direct visitor spending—leading to \$16.52 billion in total visitor-related spending—generated an estimated \$1.34 billion in total tax revenue.
- **Accommodations** – Taxable sales in the accommodations sector neared \$2.2 billion in 2019, a 5.2% year-over-year increase; however, for the second consecutive year, average statewide occupancy rates and daily room rates remained flat.
- **Visitation** – Utah's national parks and state parks experienced record visitation in 2019.

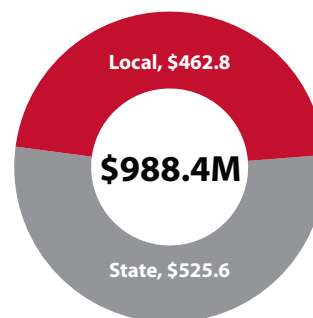


1 in 12 Utah visitors are of international origin

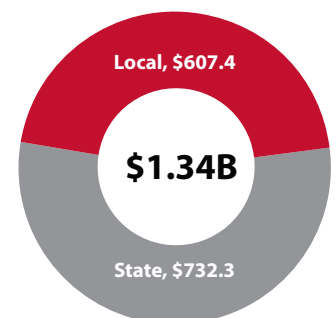
Tourism Ranks Eighth

based on the number of Utah jobs

Travel and Tourism–Generated Tax Revenue, 2019



Direct Tax Revenue
 (\$10.06 B in visitor spending)

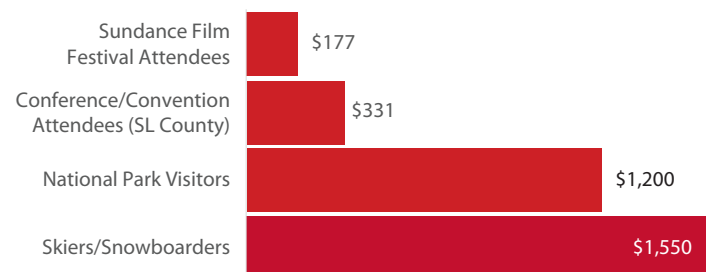


Total Tax Revenue
 (\$16.52 B in visitor-related spending)

Note: Includes economic multiplier effects.

Source: Kem C. Gardner Policy Institute analysis of U.S. Travel Association and Utah State Tax Commission data

Top Utah Spenders in 2019 (in millions)



Note: Includes local and nonlocal spending.

Sources: RRC Associates, National Park Service, Visit Salt Lake, and Y2 Analytics

Table of Contents

Introduction	1
Travel & Tourism Industry – 2019 Year in Review	1
Travel & Tourism 2020 Outlook	2
Travel & Tourism: Spending & Visitation	2
Park Visitation	4
Ski Industry	6
Conferences & Conventions	6
Sundance Film Festival	7
Travel & Tourism Employment	8
Tax Revenue	9
Hotel Occupancy & Rates	11
Short-Term Rentals	11
Other Indicators	12
Research Methods	12
Terms	12
Modeling Economic and Fiscal Impacts	13
References	14

Figures

Figure 1: U.S. vs. Utah Travel Indicators, Y-O-Y Change, 2018–2019	2
Figure 2: Direct Visitor Spending	2
Figure 3: Direct Visitor Spending by Visitor Type, 2019	2
Figure 4: Direct Visitor Spending by Category, 2019	2
Figure 5: Leisure and Hospitality Taxable Sales, Top 10 Counties, 2019	3
Figure 6: Leisure and Hospitality Taxable Sales by Travel Region, 2019	4
Figure 7: Share of Domestic Visitors by State, 2019	4
Figure 8: Share of International Arrivals by Country, 2019	4
Figure 9: International Share of Deplaned Passengers, Salt Lake City International Airport, 2010–2019	4
Figure 10: Utah National Park Annual Visitor Spending by Category, 2019	4
Figure 11: Utah National Park Recreation Visitation	5
Figure 12: Utah National Park Recreation Visitation by Month, 2018 and 2019	5
Figure 13: Utah National Place Recreation Visitation	5
Figure 14: Year-Over-Year Change in Park Visitation	6

Figure 15: Utah Skier Days	7
Figure 16: Utah Skier/Snowboarder Annual Spending	7
Figure 17: Average Per-Person Per-Day Spending by Category, 2019–2020 vs. 2018–2019 Ski Season	7
Figure 18: Utah Ski Visitors by Place of Origin, 2019–2020	7
Figure 19: Travel & Tourism Jobs	8
Figure 20: Direct Travel & Tourism Jobs, 2019 vs. 2018	8
Figure 21: Leisure & Hospitality Job Share by Travel Region, 2019	8
Figure 22: Change in Leisure & Hospitality Jobs, 2010–2019	9
Figure 23: Total Travel and Tourism Tax Revenue, Local/State Split, 2019	9
Figure 24: Total Tax Revenue by Tax Type, 2019	9
Figure 25: Select Tourism-Related Sales Tax Revenues	9
Figure 26: Percent Change in County Transient Room Tax Revenue by Travel Region, 2018–2019	10
Figure 27: Percent Change in County Transient Room Tax Revenue by County, 2018–2019	10
Figure 28: County Transient Room Tax Revenue, Top 10 Counties, 2019	10
Figure 29: Quarterly County Transient Room Tax Revenue by Travel Region, 2019	10
Figure 30: Statewide Occupancy Rates by Month, 2018 vs. 2019	11
Figure 31: Y-O-Y Change in Average Daily Room Rate by County, 2018–2019	11
Figure 32: Available Short-Term Rentals Statewide	11

Tables

Table 1: Direct Visitor Spending	3
Table 2: Leisure and Hospitality Taxable Sales	3
Table 3: Utah National Park Recreation Visitation by Park	5
Table 4: Utah State Park Visitation	6
Table 5: Sundance Film Festival, 2017–2019	7
Table 6: Utah's Passenger Air Industry	12
Table 7: Utah's Arts, Entertainment, and Recreation Industry	12
Table 8: Utah's Accommodations Industry	12
Table 9: Utah's Food Services Industry	12

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.

In 2019, travelers spent a record \$10.06 billion in Utah, generating an estimated \$1.34 billion in total state and local tax revenue. Travel and tourism spending also supported an estimated 141,500 total Utah jobs. Utah's national parks and state parks reported record visitation. Once again, Utah visitors purchased more hotel rooms and spent more money on Utah arts, entertainment, recreation, and restaurants than ever before.

Travel & Tourism Industry – 2019 Year in Review

Although 2019 began in the midst of the longest U.S. government shutdown in history, Utah's travel and tourism sector experienced continued economic growth in 2019, including record-level visitor spending, jobs and wages, state and local tax revenue, and national and state park visitation.

During the year, Utah's Board of Tourism Development allocated more than \$4.6 million in cooperative marketing matching funds, as well as \$83,080 in additional matching funds through its Cafeteria Co-op Marketing Program. 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.

In addition, the UOT continued to uphold its Red Emerald Strategic Plan, a community-led vision aimed at attracting quality visitation by promoting Utah's "rarefied, distinctive, and unique" assets. In concert with the Red Emerald plan, the UOT launched its three-season "What Lies Between" marketing campaign, spreading the word about special places in Utah that "lie between" its popular national parks. Interestingly, for the third year in a row, Utah state park visitation continued to accelerate while Utah national park visitation continued to decelerate.

In January 2019, Headwaters Economics released a report that showed rural recreation communities attract more new residents and higher incomes than rural non-recreation counties. Positive net migration occurred in six of Utah's 14 counties defined by Headwaters as "rural." Five of these six rural counties with positive net migration were defined by Headwaters as "recreation-dependent counties." The average household income of new residents moving into a county was

generally higher in Utah's rural recreation counties compared with its rural non-recreation counties. Likewise, the fastest growth in average earnings took place in Utah's recreation-dependent rural counties.¹

A Legislative audit of transient room tax revenue (i.e., tourism promotion funding) took place in early 2019 with a final Legislative report released in April 2019. The audit sought to determine whether the sampled counties were using their transient room tax revenue as per Utah code. The auditors discovered that counties desired greater flexibility in spending these tax dollars, such as allowing more room for spending on tourism-related projects and visitor impact mitigation. After the release of the audit report, Rep. Albrecht and Sen. Vickers introduced H.B. 280, which presented desired modifications to transient room tax expenditure requirements and reporting specifications. This bill was signed by Governor Herbert on March 30, 2020.

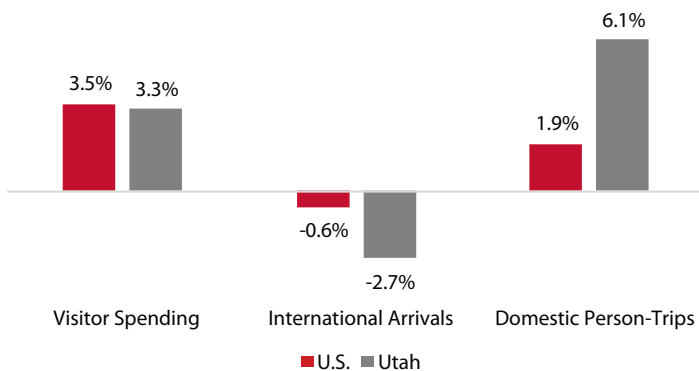
During the summer of 2019, Moab launched its "Do It Like a Local" marketing campaign to educate and encourage responsible and sustainable travel. The campaign's website offers information on preventing environmental degradation, provides tips on avoiding the need for search and rescue, and encourages supporting local businesses. Moab's tourism director noted that this was the first sustainable tourism marketing campaign ever launched in the state.

In August 2019, the UOT initiated a strategic planning process that involved stakeholder surveys and interviews. UOT's goal was to define key priorities, increase collaboration with stakeholders, identify progress-measuring tools, and ultimately strengthen the alignment between UOT's goals, programs, and budget. The study was completed in late 2019. In September, the Tourism Industry Association hosted its annual Utah Tourism Conference in Logan at Utah State University. The conference, with a theme of "Make Your Mark," convened hundreds of local and national travel partners to share tourism and travel industry information, ideas, and best practices.

It is also important to note that throughout the year, work continued on the SLC International Airport's \$4 billion expansion project (aka "The New SLC"). Phase one of the airport redesign opened in mid-September 2020. In addition, the contract to construct a 26-story, 700-room, convention hotel adjacent to the Salt Palace Convention Center in downtown Salt Lake City was finalized in 2019 and hotel construction began in early 2020. These are two major projects that could have a significant impact on Utah's travel and tourism economy in the future.

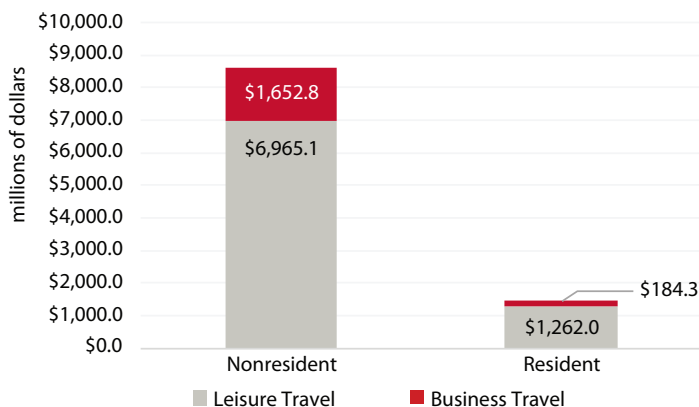
According to the U.S. Travel Association, in 2019 U.S. travel spending increased 3.5% nationally and 3.3% in Utah. Tourism

Figure 1: U.S. vs. Utah Travel Indicators, Y-O-Y Change, 2018–2019



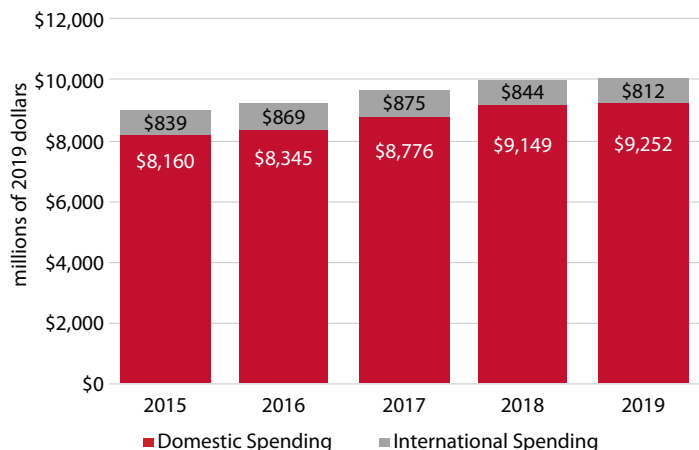
Sources: U.S. Travel Association, Tourism Economics, and Omnitrak

Figure 3: Direct Visitor Spending by Visitor Type, 2019



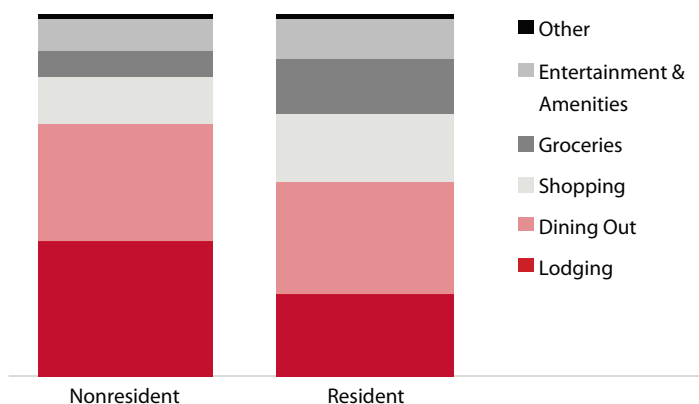
Source: U.S. Travel Association

Figure 2: Direct Visitor Spending



Note: Consists of resident, domestic nonresident, and international visitor spending.
Source: U.S. Travel Association

Figure 4: Direct Visitor Spending by Category, 2019



Note: Public transportation spending (airfare, train, bus, taxi, etc.) has been removed.
Source: Kem C. Gardner Policy Institute analysis of U.S. Travel Association data

Economics reported a -0.6% year-over-year decline in international arrivals to the U.S. and a -2.7% decrease in Utah. Year-over-year domestic person-trips, however, increased 1.9% in the U.S. and 6.1% in Utah. (Figure 1)

Travel & Tourism 2020 Outlook

Though U.S. travel remained strong in 2019, industry forecasters could not have anticipated what was around the corner. In early 2020, the COVID-19 pandemic rattled the world—and particularly the travel and tourism industry—with unprecedented force. As positive coronavirus cases surfaced in the U.S., travel and tourism-related businesses responded by shutting down or significantly altering operations. As of June 2020, 45 states and the District of Columbia had enacted some form of stay-at-home order following the U.S. outbreak. Commercial airlines grounded flights, lodging facilities temporarily closed their doors to visitors, and restaurants transitioned to takeout or delivery service only.

In June 2020, the U.S. Travel Association revised their original travel forecast (February 2020) to reflect COVID's impact. Their updated 2020 numbers show a predicted 44% year-over-year decline in total traveler spending, a 64% decline in international arrivals to the U.S., and a 30% decline in domestic person-trips. In fact, the U.S. Travel Association does not foresee visitor spending or international visitation returning to 2019 levels for another four to five years, and domestic person-trips for another three years. The COVID-19 pandemic has had and will continue to have a significant impact on the travel and tourism industry, particularly in the form of tourism-related business closures and job losses.

Travel & Tourism: Spending & Visitation

Utah visitors directly spent a record \$10.06 billion in 2019. Domestic visitors contributed 91.6% and international visitors 8.4% of this total spending amount. When adjusted for inflation, Utah visitor spending increased 3.3% year-over-year and an

Table 1: Direct Visitor Spending
(millions of dollars)

Industry	2018	2019	% Change
Other	\$78.15	\$79.09	1.2%
Amenities (golf fees, spa, health club, ski passes, etc)	\$82.84	\$91.70	10.7%
Entertainment/Admissions	\$340.92	\$344.91	1.2%
Groceries	\$387.81	\$404.95	4.4%
Shopping/Gifts/Souvenirs	\$655.45	\$679.78	3.7%
Food/Beverage/Dining (excluding groceries)	\$1,512.79	\$1,579.46	4.4%
Lodging	\$1,657.67	\$1,713.70	3.4%
Public Transportation (airfare, train, bus, taxi, etc.)	\$1,829.97	\$1,925.34	5.2%
Auto Transportation (Gasoline, car rental, parking, etc.)	\$3,199.66	\$3,245.33	1.4%
Total Spending	\$9,745.26	\$10,064.26	3.3%

Source: Omnitrak

Figure 5: Leisure and Hospitality Taxable Sales, Top 10 Counties, 2019
(millions of dollars)

County	Amount
Salt Lake County.....	\$3,563.2
Utah County.....	\$1,050.4
Summit County.....	\$885.5
Davis County.....	\$637.9
Washington County.....	\$607.4
Weber County.....	\$470.7
Grand County.....	\$202.6
Cache County.....	\$192.0
Wasatch County.....	\$153.2
Kane County.....	\$144.8

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

Table 2: Leisure and Hospitality Taxable Sales
(millions of 2019 dollars)

Industry	2015	2016	2017	2018	2019	Change 2015–2019	Change 2018–2019
Performing Arts, Spectator Sports, Related	\$135.21	\$154.93	\$153.15	\$160.37	\$153.40	13.5%	-4.3%
Museums, Historical Sites, Zoos, Parks, Similar	\$37.97	\$43.53	\$60.46	\$63.47	\$62.10	63.5%	-2.2%
Amusement & Recreation	\$661.70	\$735.64	\$741.34	\$729.98	\$773.10	16.8%	5.9%
Hotels, Motels, B&Bs, Resorts, Other	\$1,770.83	\$1,916.28	\$2,041.45	\$2,040.13	\$2,129.90	20.3%	4.4%
RV Parks, Camps	\$43.99	\$47.97	\$51.23	\$45.63	\$48.60	10.5%	6.5%
Restaurants & Other Eating Places	\$4,486.98	\$4,648.22	\$4,664.04	\$4,670.17	\$4,805.20	7.1%	2.9%
Special Food Services, Food Carts	\$461.89	\$490.24	\$522.52	\$543.05	\$531.40	15.0%	-2.1%
Drinking Places (alcoholic beverages)	\$134.40	\$137.65	\$141.10	\$141.91	\$138.40	3.0%	-2.5%
Total	\$7,733.0	\$8,174.4	\$8,375.3	\$8,394.7	\$8,642.1	11.8%	2.9%

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

annual average 5.1% over the past five years. Of the \$10.06 billion in visitor spending, nonresident visitors spent an 85.6% share and Utah residents a 14.4% share. Overall, leisure travelers contributed 81.7% of the spending and business travelers 18.3%. Resident travelers spent smaller relative shares on dining and lodging and larger relative shares on shopping, groceries, and entertainment than nonresident visitors. Overall, Utah visitors spent the largest share of dollars on auto transportation, which includes gasoline purchases, car rentals, auto repairs, and parking fees. (Figures 2–4, Table 1)

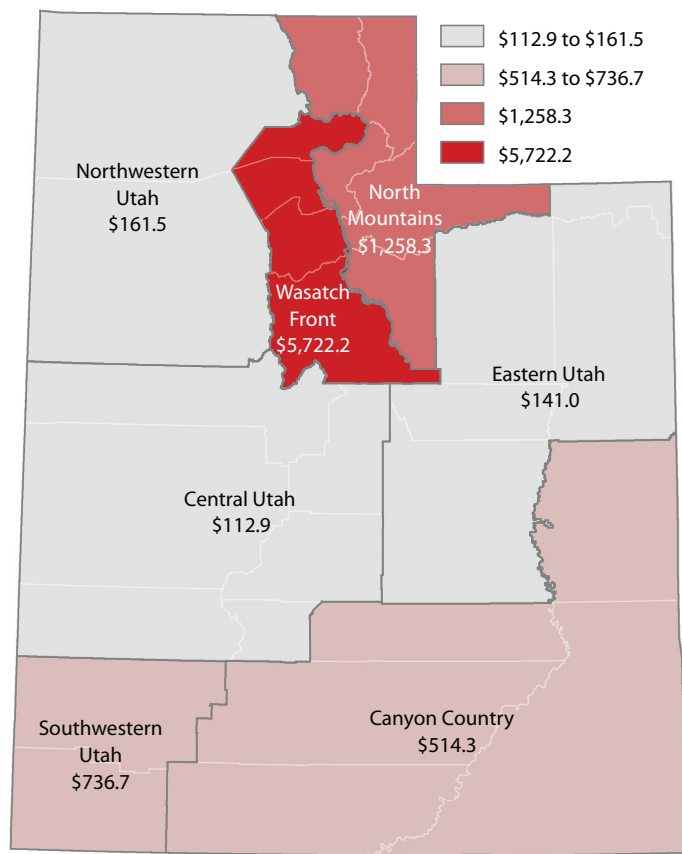
Taxable sales in Utah’s leisure and hospitality sector—which includes the arts, entertainment, recreation, accommodations, and foodservice sectors—increased 11.8% over the last five years and 2.9% year-over-year (adjusted for inflation).² (Table 2) Leisure and hospitality sector sales generally reflect Utah tourism industry trends since travelers and tourists make

around 30% of arts, entertainment, and recreation purchases, 85% of accommodations purchases, and 20% of foodservice purchases on a statewide basis. Regionally, the majority of leisure and hospitality sales took place along the Wasatch Front and North Mountains regions, followed by the Southwestern Utah and Canyon Country regions (see Figure 6 and the “Terms” section of this report for travel region definitions). In 2019, 63% of all leisure and hospitality sales took place in the top three counties of Salt Lake, Utah, and Summit. (Figures 5–6)

In 2019, California, Nevada, and Idaho were once again the top three sources of domestic nonresident visitors to Utah; likewise, Canada, China, and Germany continued to hold the top three spots for international arrivals. It is interesting to note that the international share of deplaned passengers at the Salt Lake City International Airport has doubled since 2011. (Figures 7–9)

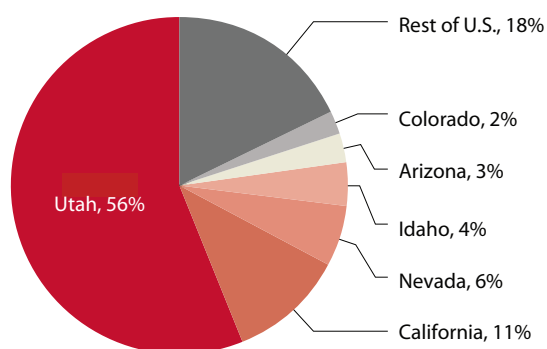
Figure 6: Leisure and Hospitality Taxable Sales by Travel Region, 2019

(millions of Dollars)



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

Figure 7: Share of Domestic Visitors by State, 2019

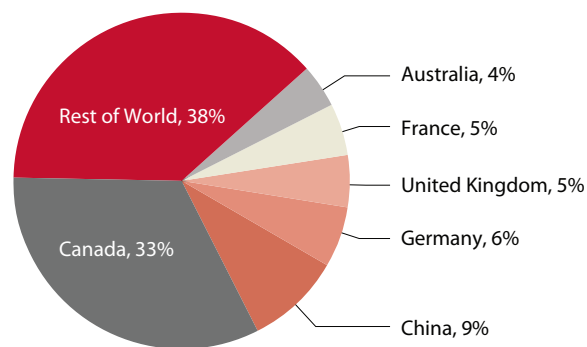


Source: Omnitrak

Park Visitation

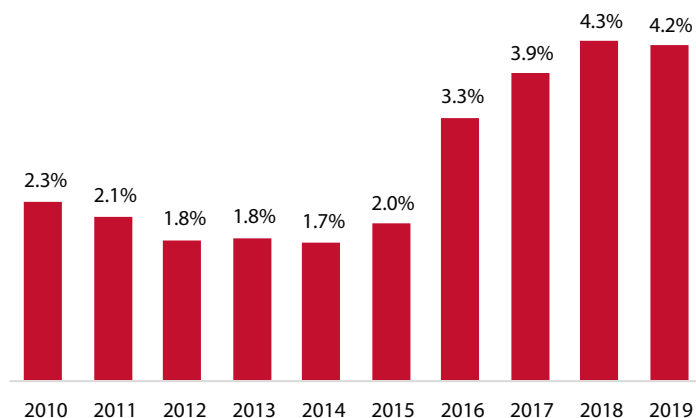
Utah's national parks and national monuments, recreation areas, and historic sites ("national places") and state parks draw resident and nonresident visitors annually. According to the National Park Service (NPS), in 2019, national park visitors spent \$1.2 billion in Utah's "gateway communities," generating 18,700 jobs, \$605 million in labor income, and \$1.8 billion in total output. Utah national park visitors spent the largest share of dollars on hotels, restaurants, and gasoline. (Figure 10)

Figure 8: Share of International Arrivals by Country, 2019



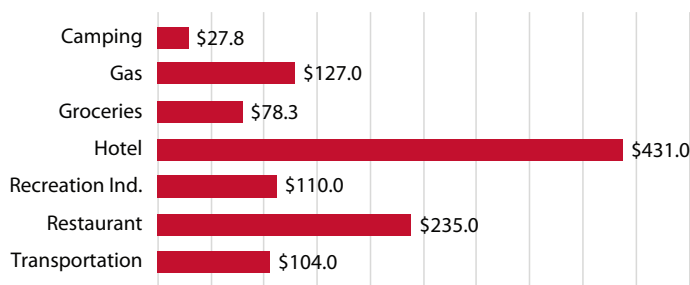
Source: Tourism Economics

Figure 9: International Share of Deplaned Passengers, Salt Lake City International Airport, 2010–2019



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

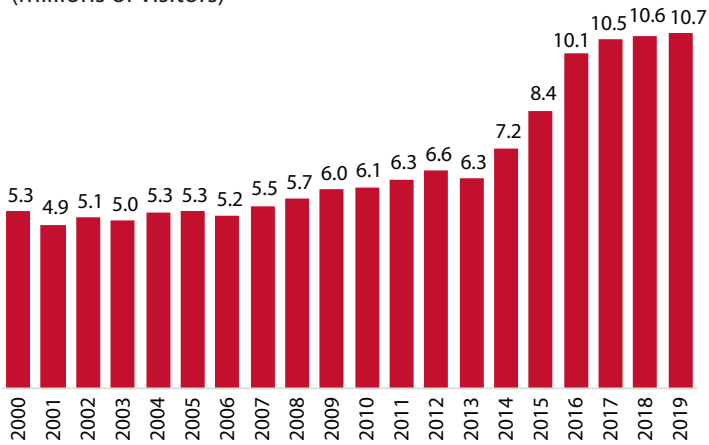
Figure 10: Utah National Park Annual Visitor Spending by Category, 2019



Source: National Park Service

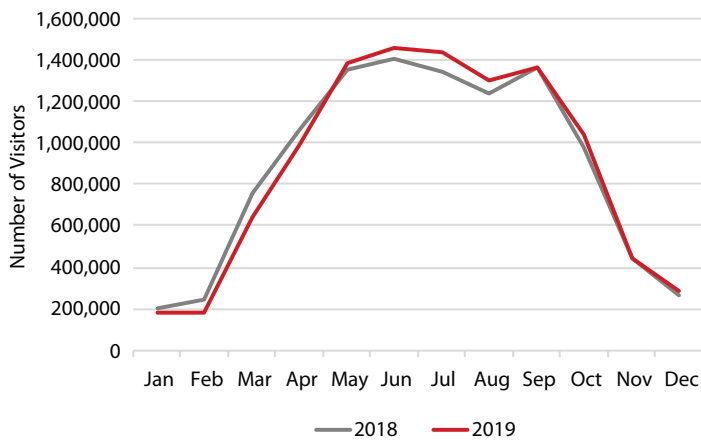
In 2019, Utah's five national parks received a combined record 10.7 million recreation visits, a 0.5% increase from 2018 and a 27.6% increase from 2015. Utah's national parks have experienced a deceleration and leveling off of visitation during the past four years. This slowdown has been attributed to a variety of factors, including the economy, government shutdowns, gas prices, weather, and the natural aftereffects of two historic visitation years (2016 park centennial and 2017 solar eclipse).³ (Figure 11)

Figure 11: Utah National Park Recreation Visitation
(millions of visitors)



Source: National Park Service

Figure 12: Utah National Park Recreation Visitation by Month, 2018 and 2019



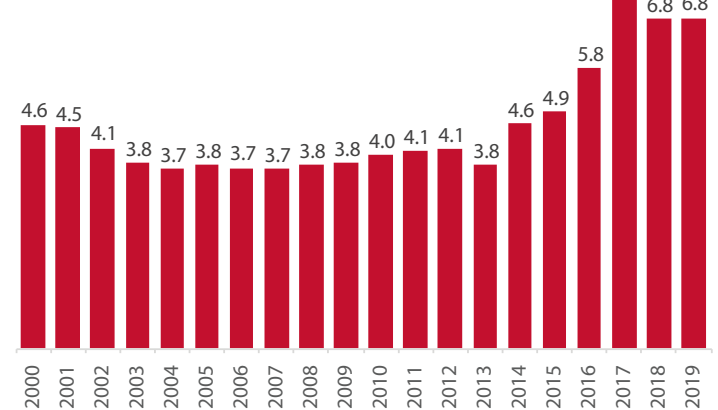
Note: Consists of Arches, Bryce Canyon, Canyonlands, Capitol Reef, and Zion National Parks.
Source: National Park Service

Table 3: Utah National Park Recreation Visitation by Park

Utah National Parks	2018	2019	Change
Arches NP	1,663,557	1,659,703	-0.2%
Bryce Canyon NP	2,679,478	2,591,550	-3.3%
Canyonlands NP	739,449	733,996	-0.7%
Capitol Reef NP	1,227,627	1,209,376	-1.5%
Zion NP	4,320,033	4,488,269	3.9%
Total National Park Visitors	10,630,144	10,682,894	0.5%

Source: National Park Service

Figure 13: Utah National Place Recreation Visitation
(millions of visitors)



Note: Flaming Gorge NRA and Bears Ears NM visitation data not included.

Source: Kem C. Gardner Policy Institute analysis of National Park Service and Bureau of Land Management data

According to the NPS, in 2019 the majority of Utah's national park visits (65%) occurred between the months of May and September, followed by the "shoulder" months of April and October (19%). The NPS reported slightly more visitors during the summer of 2019 and slightly fewer visitors during the winter and spring of 2019 compared with the previous year. (Figure 12)

Utah's "Crown Jewel" Zion National Park was the only Utah national park to experience an increase in visitation from 2018 to 2019 (3.9%). All four other national parks experienced a decline in year-over-year visitation, with Bryce Canyon experiencing the greatest visitation drop (-3.3%). (Table 3)

In addition to five national parks, Utah is home to 11 national places. In 2019, Glen Canyon National Recreation Area received the largest number of recreation visitors (over 4 million) and had the largest year-over-year growth (an additional 111,000 visitors). Golden Spike National Monument experienced the fastest year-over-year increase in visitors (79.9%), due largely to

the monument's events held to celebrate the 150th anniversary of the completion of the transcontinental railroad. Overall, in 2019, Utah national place visitation remained flat. (Figure 13).

In fiscal year 2019, Utah state parks reported a combined 7.4 million recreation visits (a new record), with annual total visits increasing 10.6% from the previous year. In 2019, Dead Horse Point experienced the greatest total visitation with close to 1 million visitors and had the largest year-over-year visit increase at 206,819. Gunlock State Park had the fastest year-over-year visitation increase (74.2%). (Table 4)

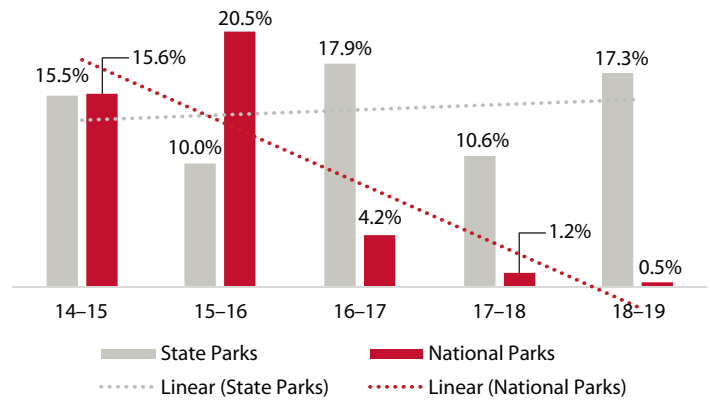
Over the past few years, national park visitation has decelerated while state park visitation has accelerated. This may be in part due to a UOT marketing shift towards promoting Utah's less-visited, but equally stunning, state parks. In 2016, the Utah Office of Tourism launched its "Road to Mighty" ad campaign and, in 2019, its "What Lies Between" campaign. Both marketing campaigns encourage visitors to explore places along the way

Table 4: Utah State Park Visitation

Utah State Park	FY18	FY19	Change
Anasazi Indian Village State Park	20,062	19,099	-4.8%
Antelope Island State Park	496,023	523,590	5.6%
Bear Lake State Park	338,018	382,767	13.2%
Camp Floyd State Park Museum	13,121	13,183	0.5%
Coral Pink Sand Dunes State Park	124,701	130,045	4.3%
Dead Horse Point State Park	765,436	972,255	27.0%
Deer Creek State Park	415,800	412,627	-0.8%
East Canyon State Park	124,117	143,195	15.4%
Echo State Park	NA	16,221	0.0%
Edge of the Cedars State Park Museum	12,228	13,257	8.4%
Escalante Petrified Forest State Park	64,693	64,142	-0.9%
Fred Hayes State Park at Starvation	120,856	111,225	-8.0%
Fremont Indian State Park	25,373	27,816	9.6%
Frontier Homestead State Park Museum	12,458	11,471	-7.9%
Goblin Valley State Park	268,760	301,089	12.0%
Gooseheads State Park	66,342	66,594	0.4%
Great Salt Lake State Park	122,192	83,698	-31.5%
Green River State Park	73,655	81,428	10.6%
Gunlock State Park	33,459	58,288	74.2%
Huntington State Park	37,232	35,487	-4.7%
Hyrum Lake State Park	90,320	97,083	7.5%
Jordan River OHV State Park	35,951	34,313	-4.6%
Jordanelle State Park	606,001	598,154	-1.3%
Kodachrome Basin State Park	125,867	135,238	7.4%
Millsite State Park	11,873	12,172	2.5%
Otter Creek State Park	34,332	34,566	0.7%
Palisade State Park	151,399	150,951	-0.3%
Piute State Park	1,146	617	-46.1%
Quail Creek State Park	127,948	148,466	16.0%
Red Fleet State Park	43,393	49,382	13.8%
Rockport State Park	142,710	136,905	-4.1%
Sand Hollow State Park	677,418	827,527	22.2%
Scofield State Park	24,438	21,009	-14.0%
Snow Canyon State Park	343,043	511,429	49.1%
Steinaker State Park	33,859	16,910	-50.1%
Territorial Statehouse State Park Museum	7,445	9,301	24.9%
Utah Field House of Natural History State Park Museum	56,039	57,319	2.3%
Utah Lake State Park	93,437	127,222	36.2%
Wasatch Mountain State Park	343,959	366,766	6.6%
Willard Bay State Park	522,926	517,106	-1.1%
Yuba State Park	103,904	103,601	-0.3%
Total Visits	6,711,932	7,423,513	10.6%

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

Source: Utah State Parks

Figure 14: Year-Over-Year Change in Park Visitation

Note: Utah State Park visitation is reported by fiscal year.

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

and in-between Utah's national parks. Data show that national park and state park visitation increased at about the same rate in 2015, but have trended differently since then. (Figure 14)

Ski Industry

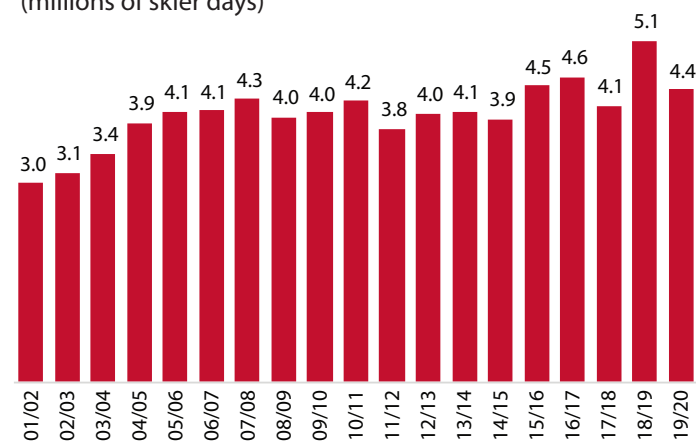
The 2019–2020 ski season met with an unusual fate as the COVID-19 pandemic swept across the nation in early 2020, disrupting ski resorts in mid-March followed by complete resort shutdowns by April. However, despite the shortened 2019–2020 season, Ski Utah reported the fourth highest visitation (4.4 million skier days) and the second highest visitor spending ever (\$1.55 billion). In fact, Utah skier spending was only 7% shy of 2018–2019 record spending despite the shortened season; also, per-visit skier expenditures were at their highest level yet. This indicates that 2019–2020 was likely poised to be another record year for Utah resorts. According to RRC Associates, during the 2019–2020 season, skiers and snowboarders spent the largest dollar shares on lodging, lift passes, and dining. California, Texas, and New York were once again the top three domestic sources of nonresident visitors who enjoyed Utah's "Greatest Snow on Earth." In addition, nearly one out of 14 skiers and snowboarders visited Utah's slopes from outside of the U.S. (Figures 15–18)

Conferences & Conventions

According to Visit Salt Lake, 2019 was another record-breaking year for Salt Lake County's conference and convention sector. In fact, it was Salt Lake's fifth consecutive record year for hotel room nights booked (819,660 room nights), or a 3.7% year-over-year increase. A combined total of 665,289 convention delegates, show and meeting attendees, and sporting/special event visitors spent an estimated \$330.6 million in Salt Lake County's economy. In addition, Salt Lake's convention center hotel contract, which was completed in 2019, directed

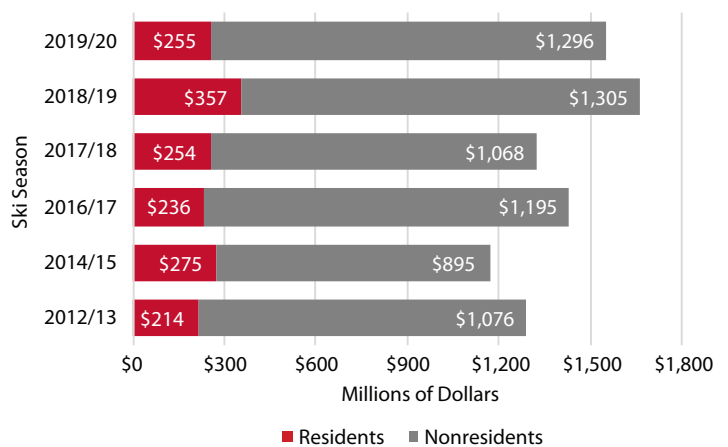
Figure 15: Utah Skier Days

(millions of skier days)



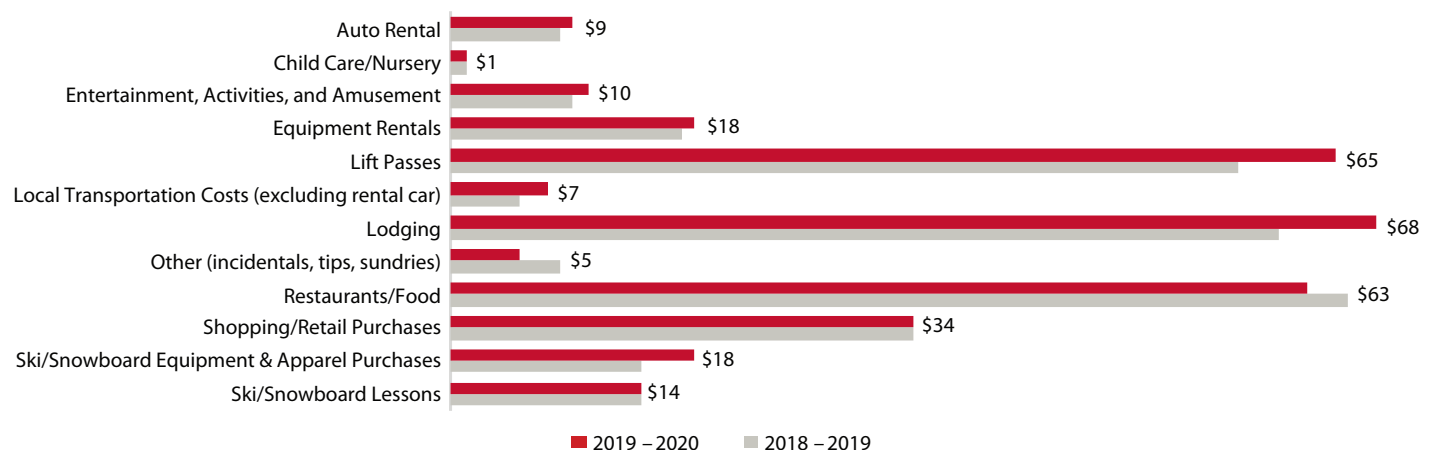
Source: Ski Utah

Figure 16: Utah Skier/Snowboarder Annual Spending



Source: RRC Associates

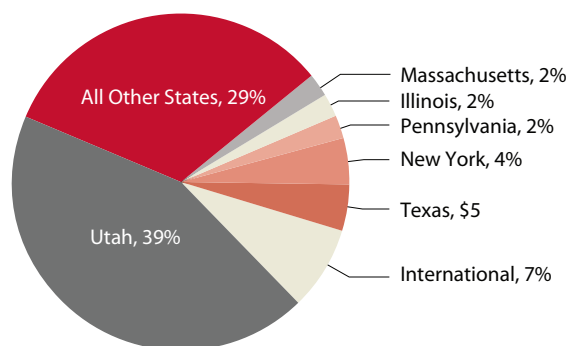
Figure 17: Average Per-Person Per-Day Spending by Category, 2019–2020 vs. 2018–2019 Ski Season



Note: Consists of both resident and nonresident skiers/snowboarders and on-mountain and off-mountain spending.

Source: Kem C. Gardner Policy Institute analysis of RRC Associates data

Figure 18: Utah Ski Visitors by Place of Origin, 2019–2020



Source: Ski Utah

construction to begin in early 2020. The 26-story, 700-room, tower is currently being built adjacent to the Salt Palace Convention Center and will allow Visit Salt Lake to secure more, and larger, future events.

Sundance Film Festival

The Sundance Film Festival, which is held each January in Park City, draws a large number of out-of-state visitors to Utah. Since 2017, Y2 Analytics has conducted economic impact studies on the film festival. Over the past three years, the festival's nonresident attendee share has decreased from one-in-two attendees to one-in-three. In 2019, non-resident visitor spending was down 4.9% from the prior year to \$149.1 million, economic impact was down 4.7%, and jobs supported by spending dropped 8.2%. (Table 5)

Table 5: Sundance Film Festival, 2017–2019

(millions of dollars)

	2017	2018	2019
Non-Resident Attendee Share	52%	36%	36%
Non-Resident Spending	\$124.3	\$156.8	\$149.1
Economic Impact	\$151.5	\$191.6	\$182.5
Total Jobs	2,778	3,323	3,052

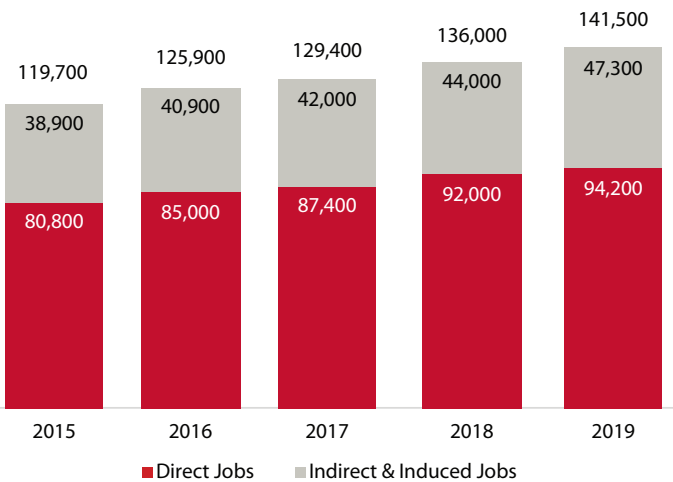
Source: Y2 Analytics

Travel & Tourism Employment

Visitor spending directly and indirectly generates and supports Utah jobs. In 2019, the record \$10.06 billion in direct visitor spending generated close to 94,200 direct jobs and supported around 47,300 additional indirect and induced jobs, summing to 141,500 total jobs statewide (up 4.0% from 2018) (Figures 19–20). When considered as its own employment sector, travel and tourism ranks eighth in Utah based on number of direct jobs by industry.

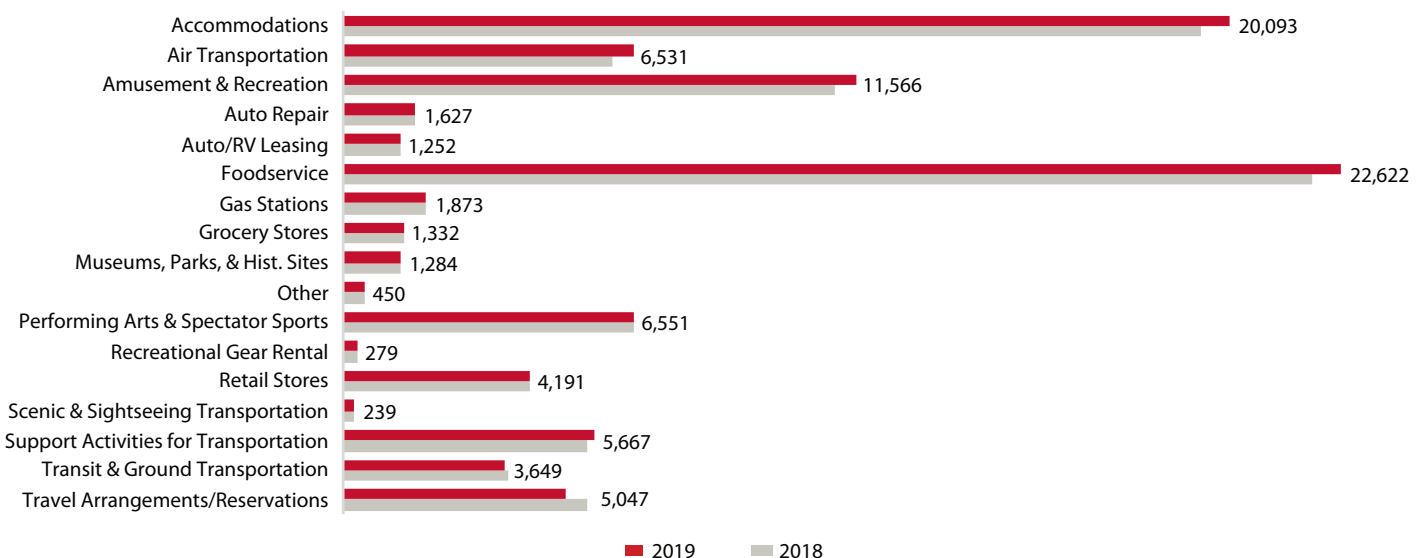
Specifically looking at private leisure and hospitality sector jobs (i.e., arts, entertainment, recreation, accommodations, and foodservice) as a share of total private jobs, the Canyon Country region had the largest share at 43.2%. Over the past 10 years, the private leisure and hospitality employment sector has grown in 26 of 29 counties. (Figures 21–22)

Figure 19: Travel & Tourism Jobs



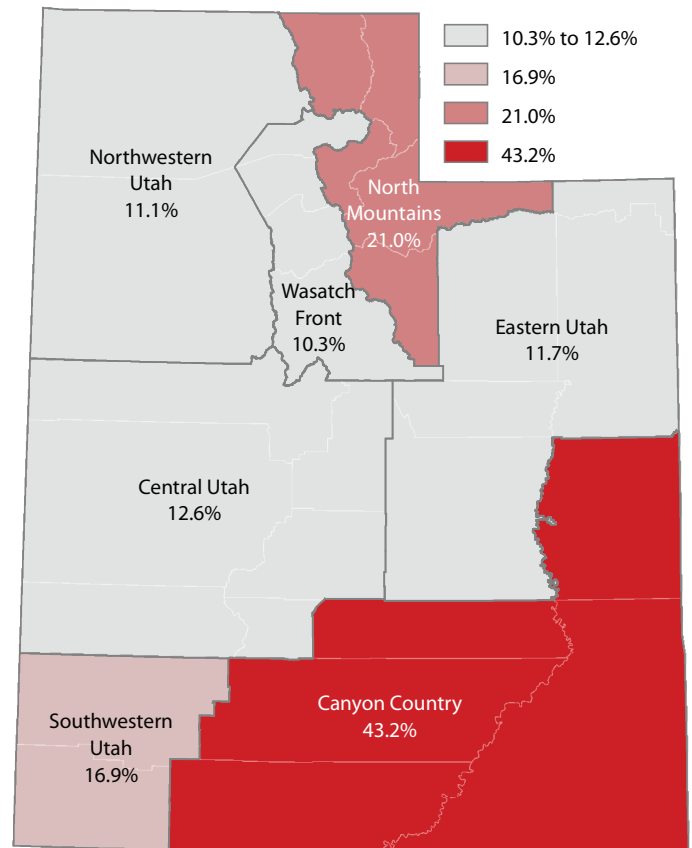
Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics and U.S. Bureau of Economic Analysis data

Figure 20: Direct Travel & Tourism Jobs, 2019 vs. 2018



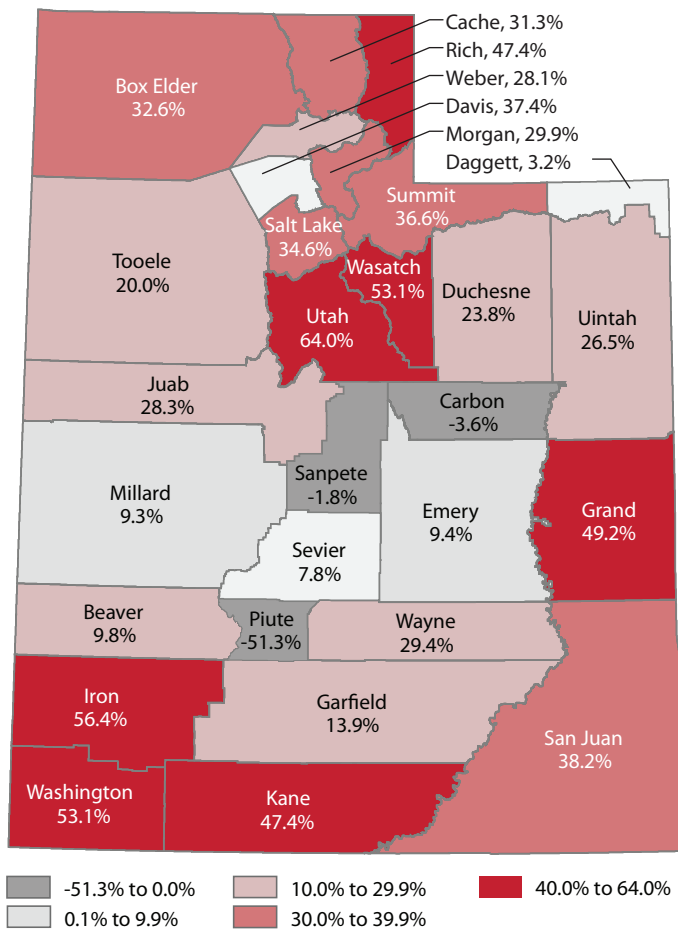
Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics and Utah Department of Workforce Services data

Figure 21: Leisure & Hospitality Job Share by Travel Region, 2019



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

Figure 22: Change in Leisure & Hospitality Jobs, 2010–2019



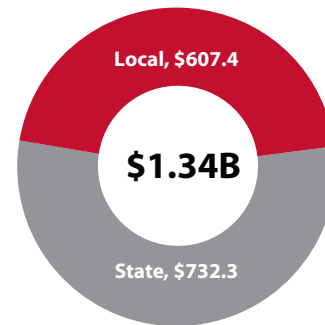
Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics data

Tax Revenue

In 2019, the \$10.06 billion in direct visitor spending, which led to \$16.52 billion in total visitor-related spending through indirect and induced spending effects, generated an estimated \$1.34 billion in state and local tax revenues. (Figures 23–24) When totaled statewide, all tourism-related tax revenues increased from 2018, even after adjusting for inflation. (Figure 25) Regionally, the Eastern Utah, North Mountains, and Northwestern regions experienced the largest year-over-year growth in county transient room tax collections. (Figure 26) At a county level, Morgan and Uintah experienced over 30% revenue increases from the prior year, while Piute and Emery were the only two counties that had lodging sales tax revenue declines. Salt Lake, Summit, and Washington counties collected the largest amount of county transient room tax statewide, accounting for 66% of total collections. (Figures 27–28)

Tracking transient room tax revenue over time reveals the seasonality of each Utah travel region. In 2019, all regions but North Mountains received the greatest visitation during the spring and summer months. In contrast, the North Mountains region collected the most transient room tax revenue during

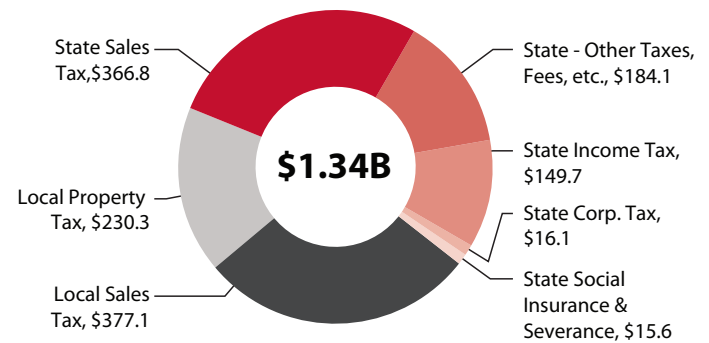
Figure 23: Total Travel and Tourism Tax Revenue, Local/State Split, 2019



Note: Includes economic multiplier effects.

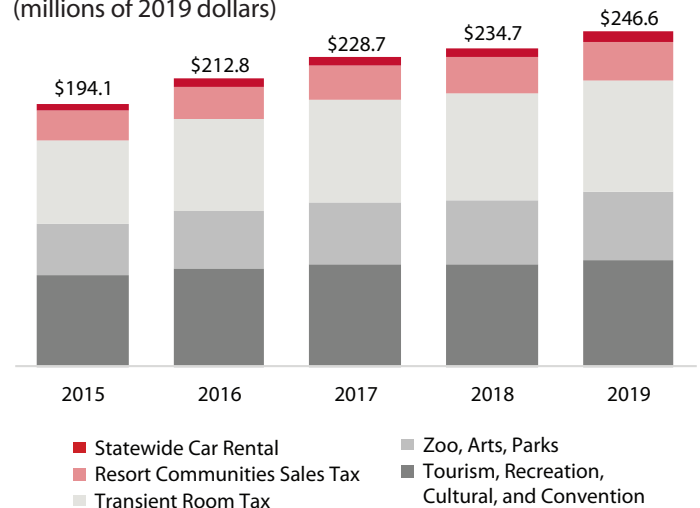
Source: Kem C. Gardner Policy Institute analysis of U.S. Travel Association and Utah State Tax Commission data

Figure 24: Total Tax Revenue by Tax Type, 2019
(millions of dollars)



Source: Kem C. Gardner Policy Institute analysis of U.S. Travel Association and Utah State Tax Commission data

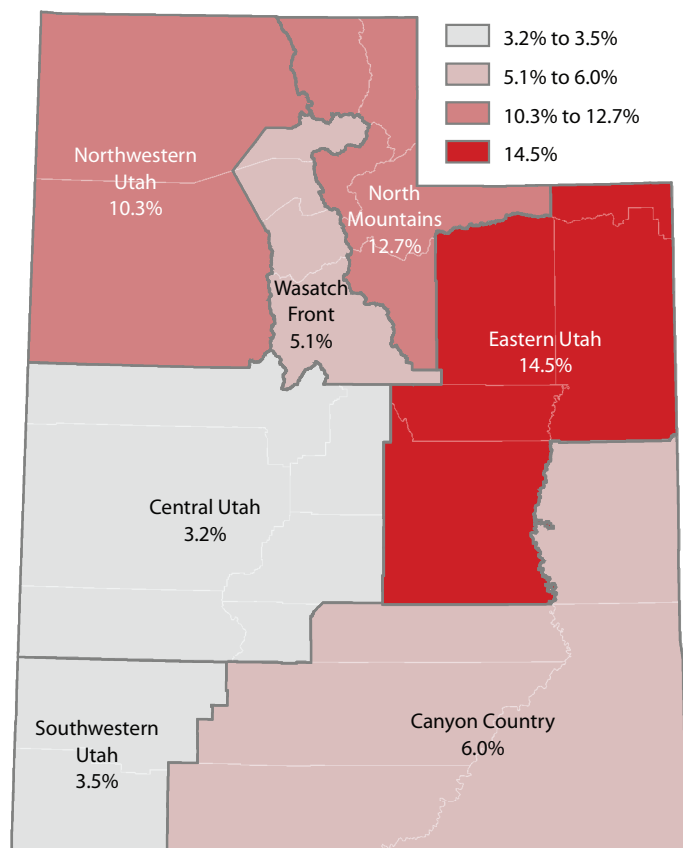
Figure 25: Select Tourism-Related Sales Tax Revenues
(millions of 2019 dollars)



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

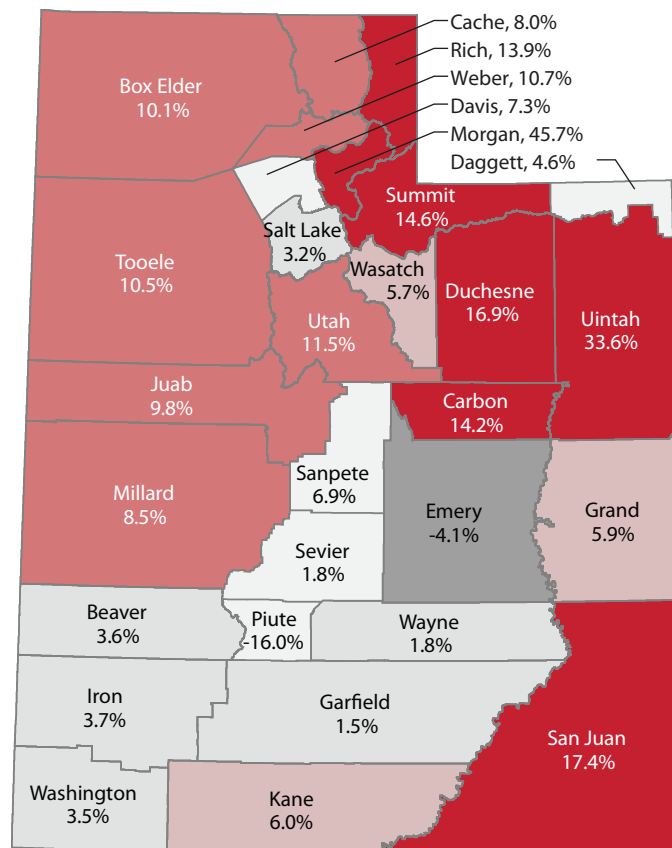
the winter months, reflecting the popularity of skiing and snowboarding in the Park City area. In addition, the Wasatch Front region experienced the greatest visitation in summer with a decline in the fall (likely due to the reduction in conference and convention activity during the fall months). (Figure 29)

Figure 26: Percent Change in County Transient Room Tax Revenue by Travel Region, 2018–2019



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

Figure 27: Percent Change in County Transient Room Tax Revenue by County, 2018–2019



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

Figure 28: County Transient Room Tax Revenue, Top 10 Counties, 2019

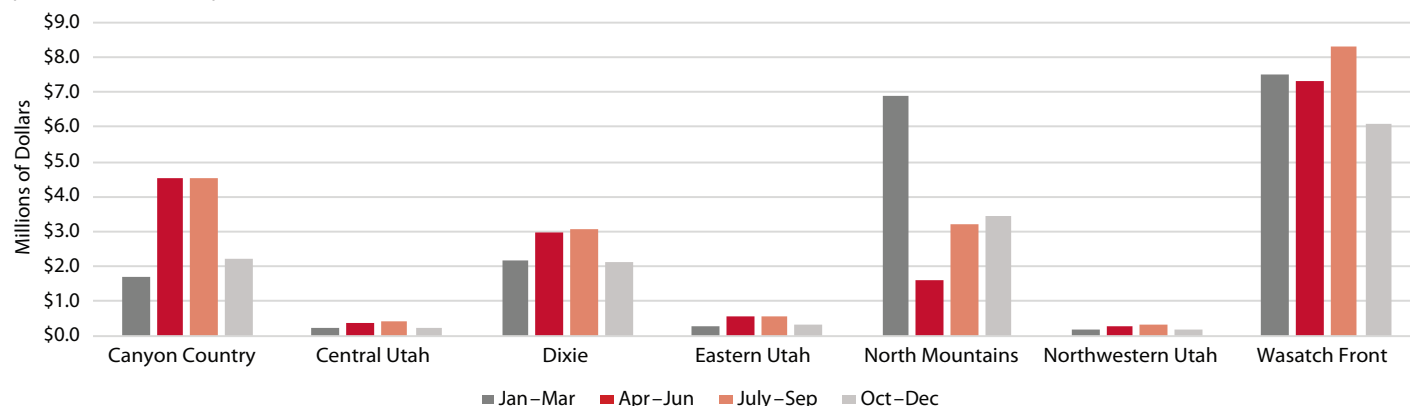
(millions of dollars)

Salt Lake	Summit	Washington	Grand	Utah	Kane	Wasatch	Garfield	Davis	Weber
\$21.1	\$11.4	\$8.9	\$5.7	\$4.3	\$3.2	\$2.4	\$2.2	\$2.0	\$1.9

Source: Utah State Tax Commission

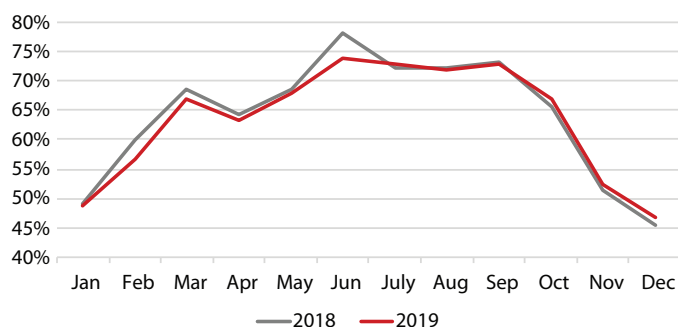
Figure 29: Quarterly County Transient Room Tax Revenue by Travel Region, 2019

(millions of dollars)



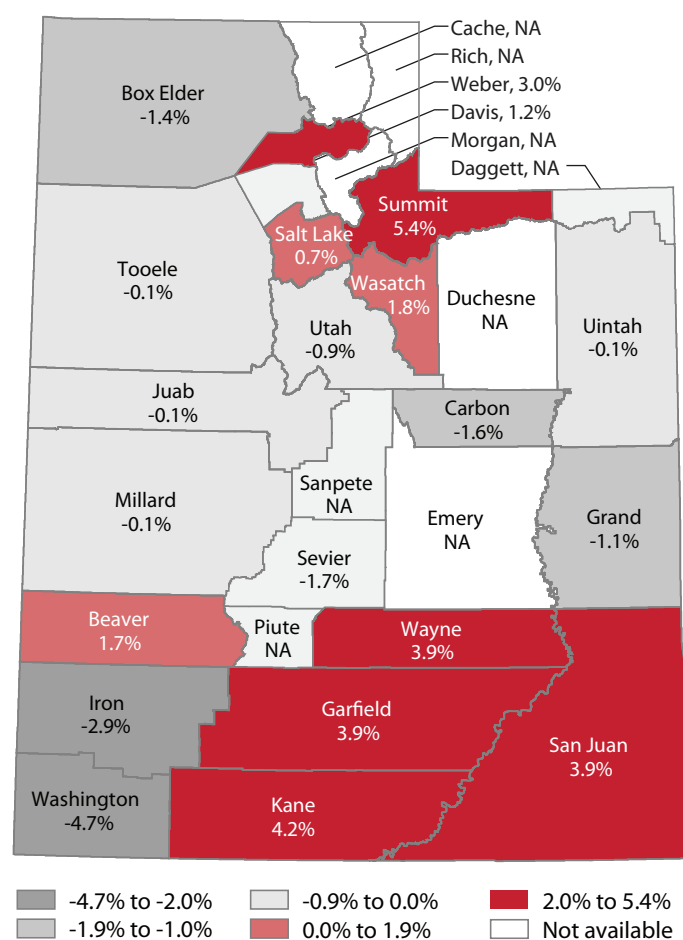
Source: Kem C. Gardner Policy Institute analysis of Utah State Tax Commission data

Figure 30: Statewide Occupancy Rates by Month, 2018 vs. 2019



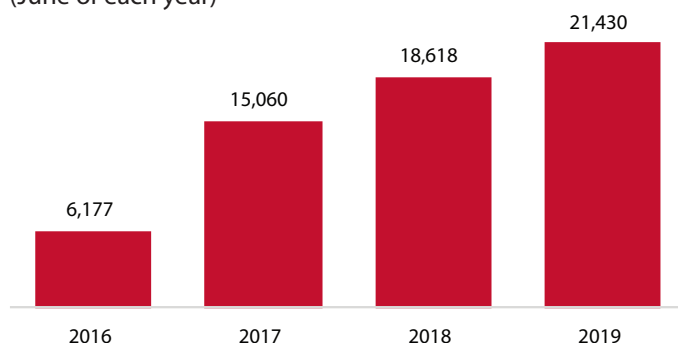
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Figure 31: Y-O-Y Change in Average Daily Room Rate by County, 2018–2019



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

Figure 32: Available Short-Term Rentals Statewide (June of each year)



Source: AirDNA

Hotel Occupancy & Rates

The average annual statewide occupancy rate in 2019 (63.4%) was slightly lower than in 2018 (64.1%); likewise, average daily room rates and revenue per available room remained flat. Possible explanations for these temperate year-over-year numbers could be a greater number of visitors staying in short-term rentals (vs. hotels) and/or a larger 2019 hotel room supply (vs. 2018). On a statewide basis, Utah hotels experienced the highest occupancy in March (spring break) and June–September (summer break). Summit, Kane, Wayne, San Juan, and Garfield had the greatest year-over-year percent increase in average daily room rates, while Summit had the greatest average daily room rate increase (\$14), followed by Kane (\$8). (Figures 30–31)

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, including all fees and taxes, online with ease. According to AirDNA, there were 6,177 available short-term rentals in Utah in June 2016 and 21,430 available short-term rentals in June 2019—a 247% increase.⁴ (Figure 32)

Table 6: Utah's Passenger Air Industry

Year	Total Deplaned Passengers	Annual Change	Employment	Annual Change	Wages (Millions)	Annual Change
2014	10,569,675	4.8%	6,212	2.5%	\$398	0.7%
2015	11,073,700	4.8%	6,162	-0.8%	\$444	11.5%
2016	11,573,010	4.5%	6,256	1.5%	\$527	18.6%
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%	7,236	5.4%	\$706	14.0%

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

Metric	2018	2019	Change
Private Employment	24,939	25,892	3.8%
Private Wages (Millions)	\$705	\$756	7.2%
Public Employment	7,412	7,721	4.2%
Public Wages (Millions)	\$123	\$130	5.5%
Taxable Sales (Millions)	\$930	\$988	6.3%

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

Travel & Tourism Industry — Other Indicators

Utah's travel and tourism industry performed well in 2019. Private jobs, wages, and sales grew in every leisure and hospitality sector reviewed in this report. (Tables 6–9)

Table 8: Utah's Accommodations Industry

Metric	2018	2019	Change
Employment	21,137	21,879	3.5%
Wages (Millions)	\$565	\$613	8.5%
Taxable Sales (Millions)	\$2,034	\$2,183	7.3%

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

Metric	2018	2019	Change
Employment	102,528	105,607	3.0%
Wages (Millions)	\$1,720	\$1,848	7.4%
Taxable Sales (Millions)	\$5,223	\$5,475	4.8%

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 economic impact and estimated tax revenue modeling in this report.

Terms

Employment is a measure of the average number of full-time and part-time jobs. Employment data from the Utah Department of Workforce Services and the U.S. Bureau of Labor Statistics include virtually all company and government employees. Employment impacts include the self-employed, as well as employees.

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.).

Travel Regions. For purposes of this report, Utah is divided into seven travel regions, organized by counties with similar demographics, economies, natural amenities, and recreational opportunities.

Wasatch Front consists of Davis, Salt Lake, Utah, and Weber counties. This region is the state's metropolitan hub and is bordered by mountains on the east and lakes on the west. Travelers visit the Wasatch Front to ski and/or recreate outdoors,

attend arts and cultural events, visit historic, religious, and other local attractions, attend conventions, conferences, and trade shows, attend sporting events, shop, and dine.

Canyon Country consists of Garfield, Grand, Kane, San Juan, and Wayne counties. This region, which is home to four of Utah's five national parks, attracts visitors to its unique geology, recreational opportunities, and scenic beauty.

Central Utah consists of Beaver, Juab, Millard, Piute, Sanpete, and Sevier counties. This region, located in the "heart" of the state, comprises rolling hills, agricultural lands, historic sites, and popular ATV trail systems.

Eastern Utah consists of Carbon, Daggett, Duchesne, Emery, and Uintah counties. This region offers fly-fishing, boating, and river rafting opportunities in and around Flaming Gorge National Recreation Area, as well as abundant paleontological, archaeological, and geological sites.

North Mountains consists of Cache, Rich, Summit, and Wasatch counties. This region includes large portions of Wasatch-Cache and Uinta National Forests, mountain topography, and eight state parks.

Northwestern Utah consists of Box Elder and Tooele counties. This region features basin and range geography with rugged mountains, endless vistas, and the unique Great Salt Lake ecosystem.

Southwestern Utah consists of Iron and Washington counties. Located in the southwestern corner of Utah, Southwestern Utah is the gateway to Zion National Park and is the warmest region in the state, allowing for year-round golf, outdoor theater, and general recreation and leisure.

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.).

The U.S. Travel Association 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 2017 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 customized a travel and tourism fiscal impact calculator. This customized model utilizes both the 2017 IMPLAN economic modeling software and the Gardner Institute fiscal calculator. The Institute's fiscal calculator uses effective tax rates to estimate the fiscal impacts related to the travel and tourism industry. Inputs to the model are employment, value added, and labor income results generated by IMPLAN software (based on total direct visitor spending entered as industry "output" and margined by the software). The underlying fiscal calculator analysis relies on historical data and assumes a linear relationship between taxes paid and personal income, earnings, industry output, and employment.

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.

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Endnotes

1. For more information on Utah's rural recreation counties, visit <https://gardner.utah.edu/blog-recreation-antidote-to-rural-population-and-job-loss/>
2. Note that "leisure and hospitality taxable sales" include all sales and not only the tourism-generated portion, which is unknown.
3. See <https://flatheadbeacon.com/2019/08/26/drop-glacier-park-visitation-reflects-national-trend/>
4. Consists of Utah Airbnb, HomeAway, and VRBO listings.



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