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The State of Utah's Travel and Tourism Industry 2020

Utah's travel and tourism industry—the hardest-hit industry by the 2020 COVID-19 pandemic—experienced a healthy recovery during the first half of 2021, particularly in Utah's rural areas.

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Analysis in Brief

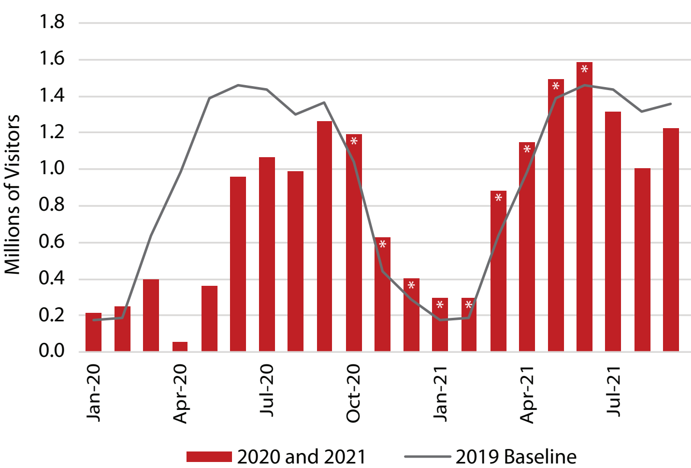
Utah visitor spending increased each consecutive year from 2009 to 2019—a trend halted by the COVID-19 pandemic. In 2020, travelers directly spent $7.07 billion in Utah, a 29.8% decline from the 2019 record spending of $10.13 billion. As a result, Utah travel and tourism spending supported 18,800 fewer jobs and generated $255 million less in total tax revenue. Despite the pandemic's disruptive impact on travel, Utah's parks and ski resorts continued to receive visitation as outdoor recreation proved to be one of the safest forms of leisure activity. The pandemic also led to an uptick in regional auto travel, short-term rental bookings, and rural exploration, not to mention a surge in digital wanderers and amenity migrants, which supported the growth of "Zoom Towns."

This report presents a high-level annual review of Utah's travel and tourism industry for 2020, as well as highlights from the first half of 2021. 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 2020 travel and tourism news events, including a discussion regarding COVID-19's impact on the travel and tourism industry and current travel and tourism issues.

Key Findings

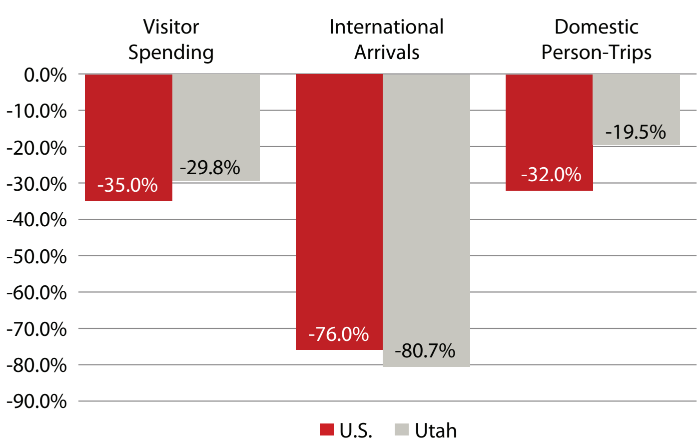
- **Spending**—Visitors directly spent $7.07 billion in the Utah economy in 2020, a 29.8% year-over decrease.
- **Jobs**—Utah's travel and tourism industry accounted for an estimated 119,600 total jobs in 2020, a 13.5% year-over decrease. Approximately 1 in 11 Utah jobs was supported by visitor spending in 2020, either directly or indirectly.
- **Tax Revenue**—The $7.07 billion in direct visitor spending—leading to $12.28 billion in total visitor-related spending—generated an estimated $1.16 billion in total tax revenues.
- **Accommodations**—Taxable sales in the accommodations sector totaled $1.63 billion in 2020, a 26.9% year-over decrease; in addition, average statewide occupancy rates dropped 26.3% and daily room rates were down 15.9%.
- **Visitation**—Utah's ski resorts and state parks experienced record visitation in 2020 despite the global pandemic, with year-over increases of 20.7% and 32.5%, respectively. Conversely, national parks welcomed 2.9 million fewer visitors in 2020 due to COVID-related park and gateway community effects.

Utah National Park Recreation Visitation by Month, 2020 and 2021 vs. 2019 Baseline



* = record visitation
Source: National Park Service

U.S. vs. Utah Travel Indicators, Y-O-Y Change, 2019–2020



Source: Kem C. Gardner Policy Institute analysis of Tourism Economics, U.S. Travel Association, and OmniTrak Group, Inc., data

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 offers 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 early 2020, the COVID-19 pandemic rattled the global travel and tourism industry with unprecedented force. As the virus surfaced in the U.S., travel restrictions, flight cancellations, stay-at-home orders, and service-oriented business closures directly impacted visitor spending, tourism-related jobs, and visitation trends. While leisure and hospitality sector sales made a healthy rebound in the fall of 2020, air travel, car rental sales, and overall U.S. traveler spending remained down 40%–50% throughout the end of the year.

Final numbers show that visitors spent $7.07 billion, or $3.06 billion less, in 2020 than in the prior year. Likewise, travel and tourism-supported jobs were down 13.5% and total tax revenue was down 18.0%. Despite the lower spending—due largely to drops in public transportation and hotel spending—visitation to Utah's parks and ski resorts fared relatively well. Domestic visitors traded their plane trips for road trips, hotel reservations for short-term rentals, and their urban-centered plans for rural adventures.

Travel & Tourism Industry—2020 Year in Review

2020 Overview

Between 2019 and 2020, 21 of Utah's 29 counties experienced year-over declines in county transient room tax revenue. Additionally, year-over taxable sales in the leisure and hospitality sector decreased 16.6% during this time. Year-over retail sales, however, were up 11.5%, reflecting the pandemic-influenced shift from public transportation, dining out, and service purchases, to auto travel, grocery shopping, and goods purchases.

From 2019 to 2020, Utah's private leisure and hospitality sector jobs declined 13.5%. For context, the average annual number of all other private sector jobs remained flat over that same time period.

Despite the pandemic's arrival in March, Utah's 2019–2020 ski season still ranked fifth for number of skier days, and second for skier spending. Prior to and early on in the 2019–2020 ski season, the Utah Office of Tourism (UOT) continued its "Mountain Time" marketing campaign for the third consecutive year. According to Strategic Marketing & Research Insights, the UOT's winter ad campaign generated 135,000 incremental (ad-influenced) skier and snowboarder visits and $377.0 million in ad-influenced spending during the 2019–2020 season.

Shortly after UOT launched its 3-season marketing campaign, the COVID-19 pandemic arrived. While many states shut down all advertising, UOT stayed top of mind by shifting to messaging that was appropriate for traveler sentiment and pandemic restrictions. Utah's night skies and wide open spaces were ideal for those seeking solitude and a change of scenery during the pandemic. The office also adjusted its efforts by focusing on regional and in-state travelers rather than a national audience.

During the pandemic, temporary national park closures likely diverted visitors to Utah's open state parks. State parks also benefited from outdoor recreation's growing popularity as a safe and socially distanced activity. From 2019 to 2020, Utah state parks experienced a 32.5% year-over increase in visitation, while national park visitation was down 27.3%.

In 2020, more than $5.0 million in cooperative marketing matching funds were awarded statewide, half of which was approved by Utah's Board of Tourism Development; the other half came from CARES Act funding. UOT also distributed an additional $2.0 million in CARES Act money. This "Meet in Utah" grant acted as a stimulus package to incentivize group gatherings in convention districts and offset the pandemic's negative impact on business travel.

Meanwhile, construction continued on Salt Lake's new convention hotel (Hyatt Regency Salt Lake City) and, in September 2020, the Salt Lake City International Airport completed the first phase of its long-term redevelopment project, The New SLC.

2021 Outlook

Domestic travel began rebounding in 2021, with international travel still lagging behind as COVID—particularly the Delta variant—continued to spread. Travel experts have predicted a 20.0% year-over increase in U.S. domestic person-trips and a 73.0% increase in international arrivals, with leisure travel rebounding more quickly than business travel. Auto travel is anticipated to continue as the preferred transportation mode, with a forecasted 19.0% year-over increase after a year of being down 26.0%. Air travel is predicted to rebound 16.0% after a year-over decline of more than 60.0%. Of course, increased 2021 travel has depended largely on the production, distribution, administration, and effectiveness of COVID-19 vaccines and the status of government-enacted travel restrictions.

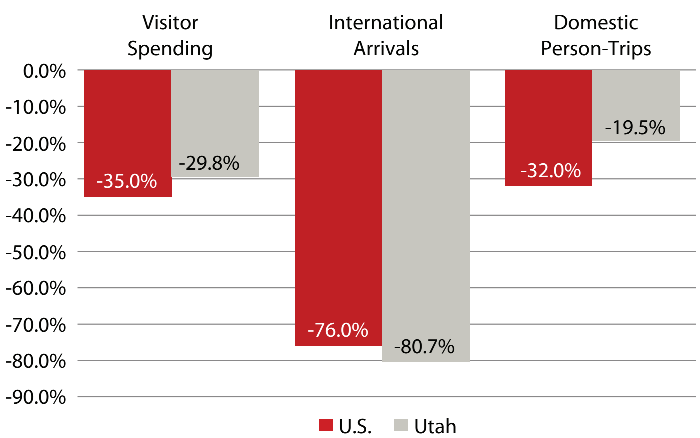
Travel & Tourism: Spending & Visitation

Overall, Utah travel and tourism fared better than the industry in neighboring states and the U.S. as a whole (see Figures 1–2).

Tourism Economics (TE) reported that Utah travelers directly spent $7.07 billion in the state's economy in 2020. According to TE, domestic visitors contributed 97.7% and international visitors 2.3% of this total spending amount. When adjusted for inflation, Utah visitor spending decreased 29.8% year-over-year and 15.4% over the past five years (see Figure 3). Of the $7.07 billion in visitor spending, nonresident visitors spent a 78.7% share and Utah residents a 21.3% share, while leisure travelers contributed 91.6% of the spending and business travelers 8.4% (see Figures 4–5). In 2020, travelers spent smaller relative shares on air travel and larger relative shares on auto travel compared with 2019. Utah resident travelers spent greater relative shares on lodging, dining out, and groceries, but a smaller share on in-state transportation than their out-of-state counterparts (see Figure 6). TE spending estimates show air travel was down 49.7%, followed by entertainment and recreation (–31.4%). Year-over decreases were smallest in the groceries (–14.2%) and auto travel (–21.7%) spending categories.

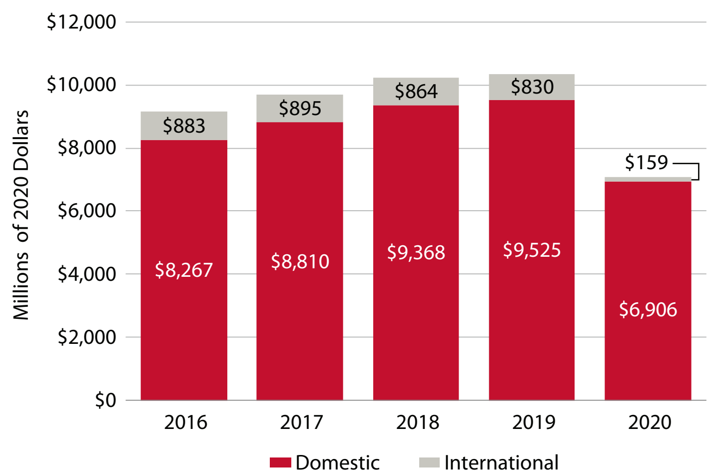
Taxable sales in Utah's leisure and hospitality sector—which includes the arts, entertainment, recreation, accommodations, and foodservice sectors—decreased 5.3% over the last five years and decreased 16.6% year-over-year (adjusted for inflation) (see Table 1). Regionally, the majority of leisure and hospitality sales took place in the Wasatch Front and North Mountains regions, followed by the Southwest and Canyon Country regions (see the "Terms" section of this report on page

Figure 1: U.S. vs. Utah Travel Indicators, Y-O-Y Change, 2019–2020



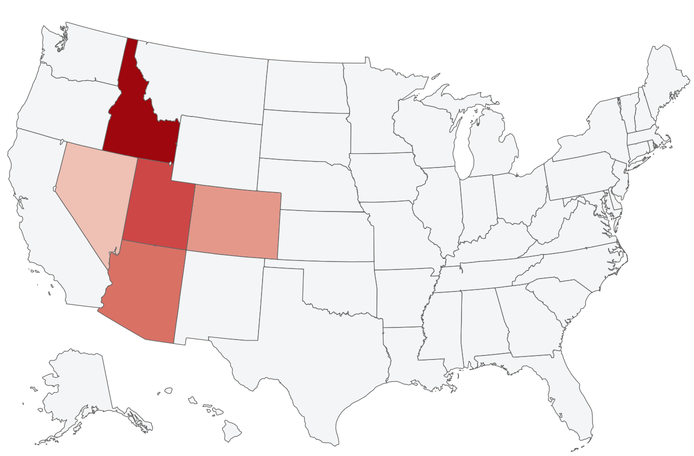
Source: Kem C. Gardner Policy Institute analysis of Tourism Economics, U.S. Travel Association, and OmniTrak Group, Inc., data

Figure 3: Direct Visitor Spending, 2016–2020



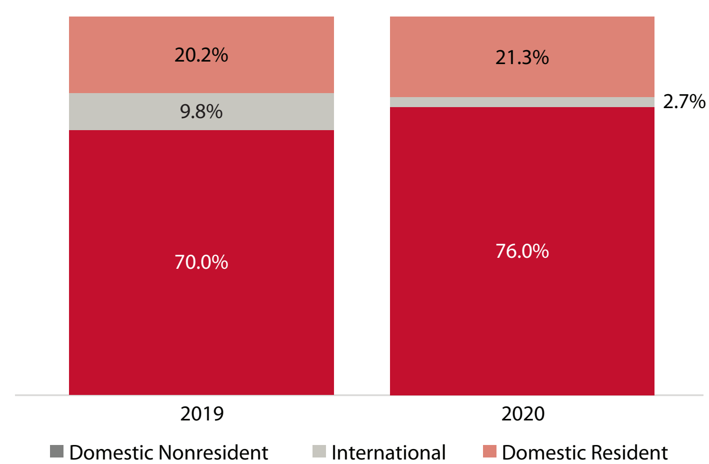
Note: Includes resident, domestic nonresident, and international visitor spending.
Source: Tourism Economics

Figure 2: Year-Over Change in Visitor Spending, 2019–2020, Utah vs. Neighboring States



Note: The darker the shade, the greater negative percent change in spending.
Source: U.S. Travel Association

Figure 4: Visitor Spending by Visitor Type, 2019 vs. 2020



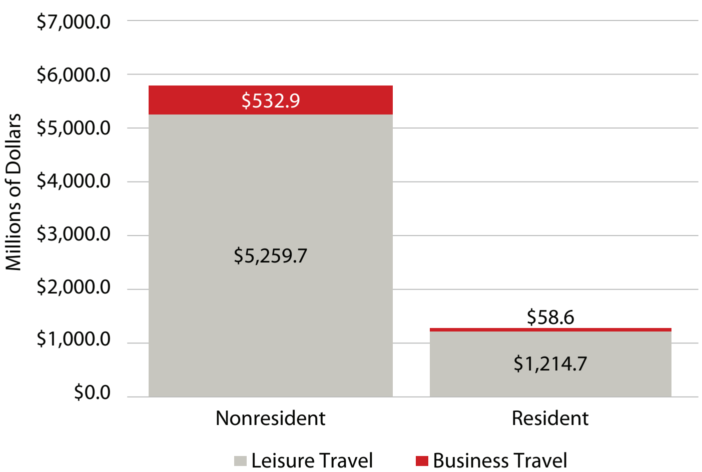
Source: Kem C. Gardner Policy Institute analysis of Tourism Economics data

Table 1: Leisure and Hospitality Taxable Sales in Utah, 2016–2020
(Millions of 2020 dollars)

Industry	2016	2017	2018	2019	2020	2016–2020 Change	2019–2020 Change
Performing Arts, Spectator Sports, Related	$149.26	$153.28	$164.39	$156.54	$46.26	-69.0%	-70.4%
Museums, Historical Sites, Zoos, Parks, Similar	$41.91	$59.94	$64.95	$63.49	$45.50	8.6%	-28.3%
Amusement & Recreation	$705.38	$729.42	$740.90	$789.98	$640.65	-9.2%	-18.9%
Hotels, Motels, B&Bs, Resorts, Other	$1,835.62	$2,011.19	$2,073.77	$2,176.36	$1,571.99	-14.4%	-27.8%
RV Parks, Camps	$45.65	$49.10	$46.34	$49.71	$55.44	21.5%	11.5%
Restaurants & Other Eating Places	$4,433.86	$4,579.08	$4,724.63	$4,910.04	$4,469.55	0.8%	-9.0%
Special Food Services, Food Carts	$443.36	$487.41	$520.55	$542.97	$438.27	-1.1%	-19.3%
Drinking Places (alcoholic beverages)	$129.33	$134.80	$141.43	$141.40	$101.15	-21.8%	-28.5%
Total	**$7,784.4**	**$8,204.2**	**$8,477.0**	**$8,830.5**	**$7,368.8**	**-5.3%**	**-16.6%**

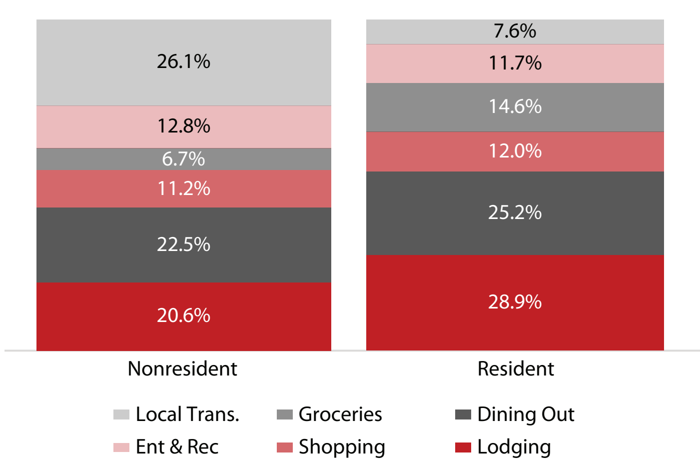
Source: Kem C. Gardner Policy Institute analysis of Utah State Tax Commission data

Figure 5: Direct Visitor Spending by Visitor Type, 2020



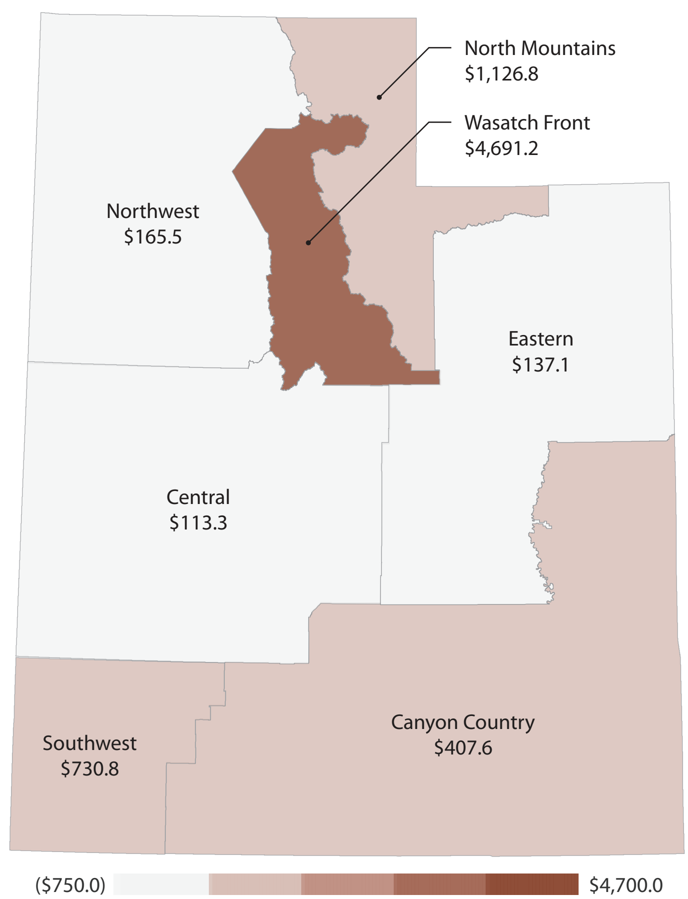
Source: Tourism Economics

Figure 6: Direct Visitor Spending by Category, 2020



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

Figure 7: Leisure and Hospitality Taxable Sales by Travel Region, 2020



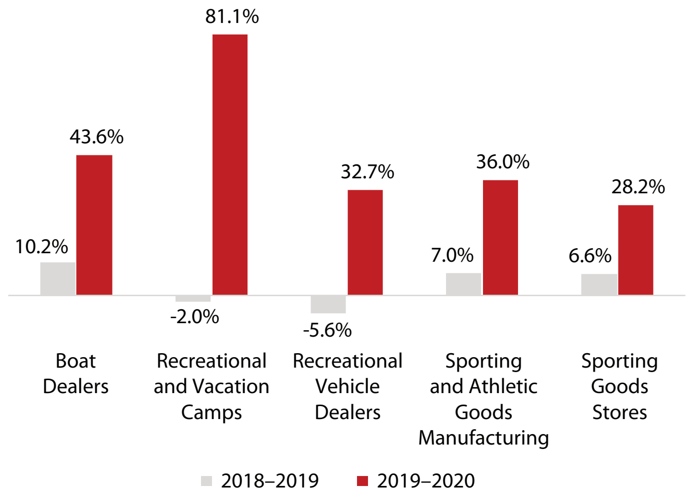
Source: Kem C. Gardner Policy Institute analysis of Utah State Tax Commission data

Table 2: Leisure and Hospitality Taxable Sales Top Ten Counties, 2020

County	Amount	County	Amount
Salt Lake	$2,643,343,876	Weber	$452,477,436
Utah	$1,011,894,888	Cache	$192,281,378
Summit	$748,105,516	Grand	$166,788,646
Washington	$596,515,667	Wasatch	$150,631,657
Davis	$583,455,665	Iron	$134,290,311

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

Figure 8: Year-Over Change in Recreation-Related Sales, 2018–2019 vs. 2019–2020



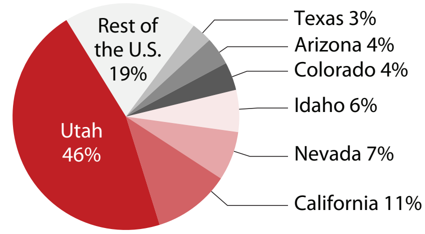
Source: Kem C. Gardner Policy Institute analysis of Utah State Tax Commission data

16 for travel region definitions) (see Figure 7). In 2020, 63.7% of all leisure and hospitality sales took place in the top three counties of Salt Lake, Utah, and Summit (see Table 2).

An interesting result of the COVID-19 pandemic was an increase in Utah outdoor recreation–related taxable sales, including boat, recreational and vacation camp, RV, and sporting and athletic goods sales (see Figure 8).

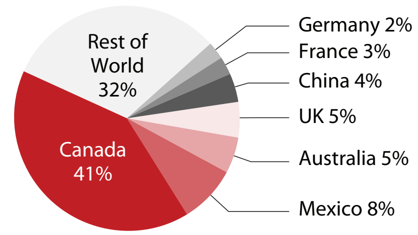
In 2020, California, Nevada, and Idaho were once again the top three sources of domestic nonresident visitors to Utah (see Figure 9). Although Californians made up a larger share—or "pie slice"—of domestic Utah visitors in 2020, the "pie" was smaller than in previous years. Canada continued to hold the number one spot for international arrivals, while Mexico and Australia replaced China and Germany for the number two and three spots (see Figure 10). Also, the SLC International Airport's international passenger share, which doubled between 2011 and 2019 from 2.1% to 4.2%, dropped back down to 2.7% in 2020 (see Figure 11). COVID-related travel restrictions caused significant declines in all of Utah's top international visitor markets, especially Germany and China (–87% each) and France (–83%) (see Figure 12).

Figure 9: Share of Domestic Visitors by State, 2020



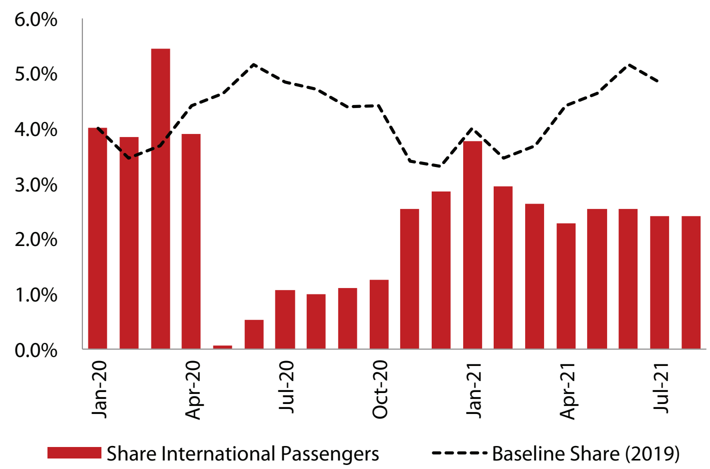
Source: OmniTrak Group Inc.

Figure 10: Share of International Visitors by Country, 2020



Source: Tourism Economics

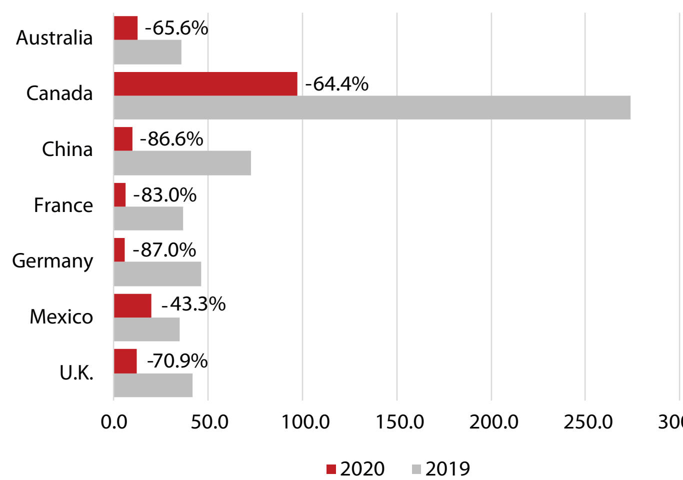
Figure 11: International Passenger Share, SLC International Airport, 2020 and 2021 vs. 2019 Baseline



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

Figure 12: International Arrivals by Top Markets and Year-Over Percent Change in Arrivals, 2019–2020

(In Thousands)



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

Park Visitation

Utah's national parks, 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 2020, national park visitors spent $878 million (down from $1.2 billion) in Utah's "gateway communities," supporting 13,600 jobs (down from 18,700), $441 million in labor income, and $759 million in total output. Utah national park visitors spent the largest shares on lodging, restaurants, and gasoline (see Figure 13).

In 2020, Utah's five national parks received a combined 7.8 million recreation visits, a 27.3% decrease from 2019. While Utah's national park visitation had begun to decelerate and level off in recent years, the pandemic led to the first year-over decline in park visitation since 2013, due in large part to pandemic-influenced park closures in spring 2020 (see Figure 14).

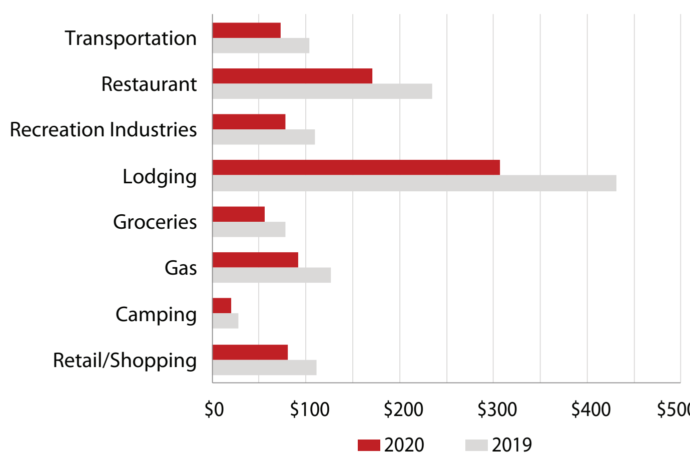
According to the NPS, the majority of Utah's national park visits in 2020 occurred between the months of September and October. In fact, the NPS reported record national park visitation both pre-pandemic (January and February) and in the fall of 2020 (September–December). Based on recent NPS visitation data, record visitation continued at Utah's five national parks during the first half of 2021, and then dropped below 2019 baseline visitation in July 2021 (see Figure 15).

All five of Utah's national parks received fewer visitors in 2020 that in 2019, with Bryce Canyon experiencing the largest year-over percent decrease (–43.5%) and Capitol Reef the smallest (–18.9%) (see 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 Canyon received the largest number of recreation visitors (over 2.5 million) despite experiencing a 41.0% decline in visitors. Likewise, Grand Staircase–Escalante had over 158,000 fewer visitors and Rainbow Bridge over 111,000 fewer visitors in 2020. Cedar Breaks was the only national place to receive an increase in visitation, welcoming an additional 266,000 visitors or an increase of 45.9%. Overall, Utah national place visitation decreased 28.5%. (see Figure 16, Table 4).

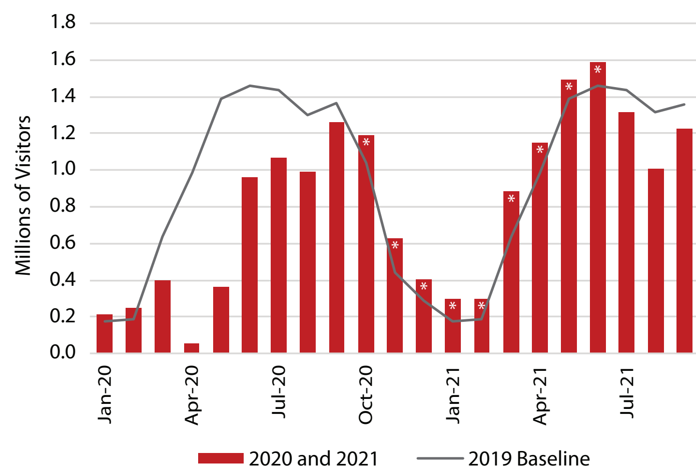
Figure 13: Utah National Park Annual Visitor Spending by Category, 2019 and 2020

(Millions of Dollars)



Source: National Park Service

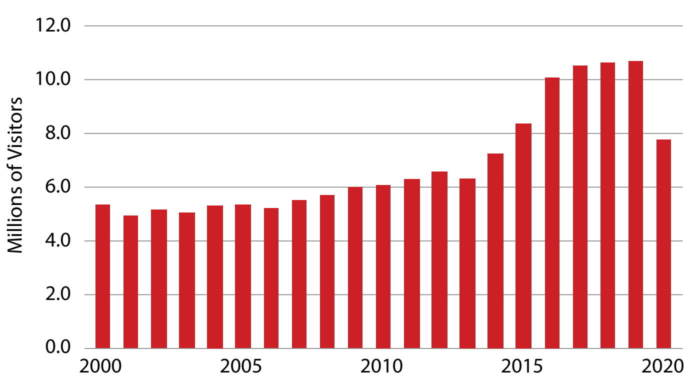
Figure 15: Utah National Park Recreation Visitation by Month, 2020 and 2021 vs. 2019 Baseline



* = record visitation

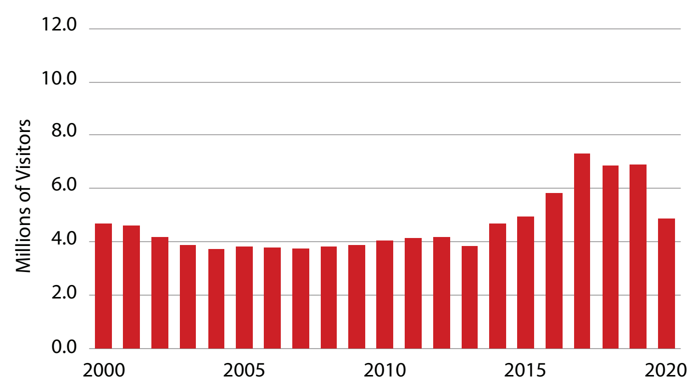
Source: National Park Service

Figure 14: Utah National Park Recreation Visitation, 2000–2020



Source: National Park Service

Figure 16: Utah National Place Recreation Visitation, 2000–2020



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

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

Table 3: Utah National Park Recreation Visitation by Park, 2019–2020

Utah National Parks	2019	2020	Change
Arches NP	1,659,703	1,238,083	-25.4%
Bryce Canyon NP	2,591,550	1,464,655	-43.5%
Canyonlands NP	733,996	493,914	-32.7%
Capitol Reef NP	1,209,376	981,038	-18.9%
Zion NP	4,488,269	3,591,254	-20.0%
Total National Park Visitors	**10,682,894**	**7,768,944**	**-27.3%**

Source: National Park Service

Table 4: Utah National Place Recreation Visitation by Site, 2019–2020

Utah National Places	2019	2020	Change
Cedar Breaks NM	579,861	845,867	45.9%
Dinosaur NM	298,965	264,145	-11.6%
Glen Canyon NRA	4,330,563	2,553,392	-41.0%
Golden Spike NHS	108,154	53,106	-50.9%
Grand Staircase–Escalante NM	1,118,102	959,234	-14.2%
Hovenweep NM	35,400	19,856	-43.9%
Natural Bridges NM	88,090	52,542	-40.4%
Rainbow Bridge NM	115,108	3,573	-96.9%
Timpanogos NM	103,512	92,481	-10.7%
Total National Place Visits	**6,777,755**	**4,844,196**	**-28.5%**

Note: Flaming Gorge NRA and Bears Ears NM visitation data are not included.
Source: National Park Service and Bureau of Land Management

In calendar year 2020, Utah State Parks reported a combined 10.6 million recreation visits (a new record), with annual total visits increasing 32.5% from the previous year (see Table 5). Sand Hollow experienced the greatest total visitation, with over 1.3 million visitors, and had the largest year-over visitor increase at close to a half-million visitors (450,917). Jordan River OHV Park and Antelope Island came in a close second and third, adding 324,547 and 286,580 visitors in 2020, respectively. Dead Horse Point and Goblin Valley reported the largest visitor losses, down -186,281 and -41,056 visitors each. Steinaker in Uintah County had the fastest year-over visitation increase (183.2%).

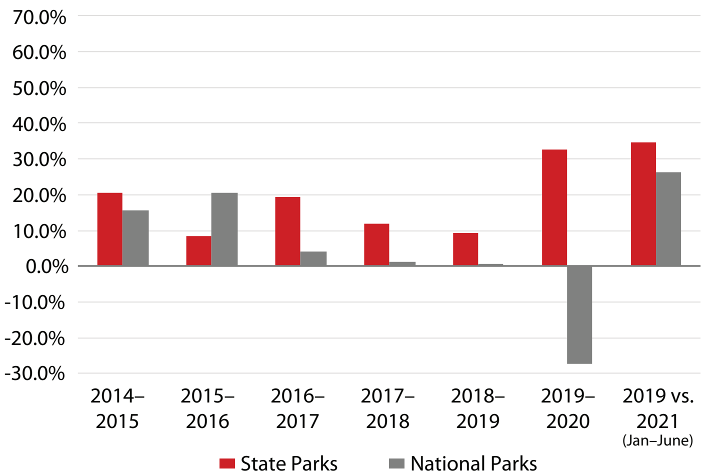
Data show that national park and state park visitation increased at similar rates in 2015, but have since trended differently with state park popularity climbing more quickly (see Figure 17). Recent Utah State Park increases are the result of a variety of things, including the Utah Office of Tourism's marketing shift towards Utah's lesser known natural amenity areas, visitors seeking less crowded parks, an uptick in outdoor recreation participation, and visitors seeking more remote recreation areas during the pandemic.

Table 5: Utah State Park Visitation by Park, 2019–2020

Utah State Park Visitation	2019	2020	YOY Change
Anasazi Indian Village State Park	19,477	14,236	-26.9%
Antelope Island State Park	528,865	815,445	54.2%
Bear Lake State Park	458,344	638,798	39.4%
Camp Floyd - Stage Coach Inn State Park	16,933	6,278	-62.9%
Coral Pink Sand Dunes State Park	128,558	177,655	38.2%
Dead Horse Point State Park	978,380	792,099	-19.0%
Deer Creek State Park	433,855	707,836	63.2%
East Canyon State Park	159,881	252,273	57.8%
Echo State Park	55,488	77,726	40.1%
Edge Of The Cedars State Park	12,735	5,196	-59.2%
Escalante Petrified Forest State Park	66,730	57,669	-13.6%
Fremont Indian State Park	32,490	45,317	39.5%
Frontier State Park	12,385	8,276	-33.2%
Goblin Valley State Park	305,325	309,039	1.2%
Goosenecks State Park	66,312	25,258	-61.9%
Great Salt Lake Marina State Park	94,687	118,118	24.7%
Green River State Park	82,336	84,413	2.5%
Gunlock State Park	71,052	114,923	61.7%
Huntington State Park	36,804	63,789	73.3%
Hyrum State Park	109,971	146,846	33.5%
Jordan River OHV State Park	55,123	94,154	70.8%
Jordanelle State Park	652,705	977,252	49.7%
Kodachrome Basin State Park	132,201	150,146	13.6%
Millsite State Park	13,347	17,633	32.1%
Otter Creek State Park	38,222	54,732	43.2%
Palisade State Park	173,421	218,091	25.8%
Piute State Park	1,408	2,682	90.5%
Point of the Mountain Sky		3,055	NA
Quail Creek State Park	169,137	295,289	74.6%
Red Fleet State Park	56,331	68,781	22.1%
Rockport State Park	153,244	253,104	65.2%
Sand Hollow State Park	864,751	1,315,668	52.1%
Scofield State Park	28,249	46,863	65.9%
Snow Canyon State Park	509,348	597,882	17.4%
Starvation State Park	112,753	165,336	46.6%
Steinaker State Park	16,686	47,260	183.2%
Territorial Statehouse State Park	10,117	3,802	-62.4%
Utah Field House Of Natural History State Park	57,381	45,995	-19.8%
Utah Lake State Park	150,475	266,968	77.4%
Wasatch Mountain State Park	360,274	476,968	32.4%
Willard Bay State Park	645,381	881,287	36.6%
Yuba State Park	124,471	153,377	23.2%
Total	**7,995,632**	**10,597,513**	**32.5%**

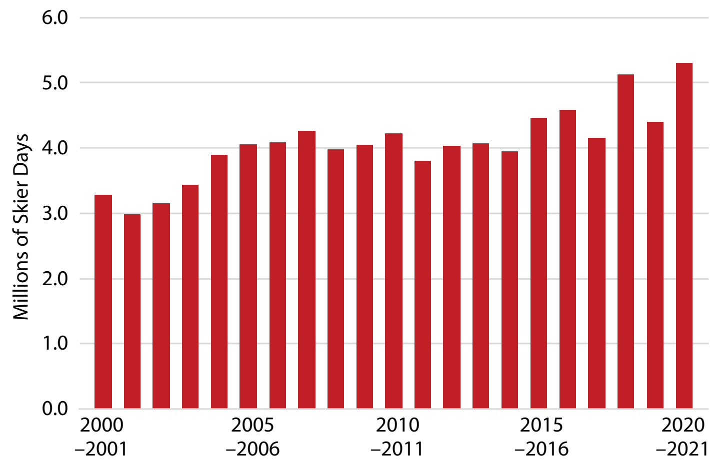
Note: Flight Path State Recreation Area, Historic Union Pacific Rail Trail, and This is the Place Heritage Park visitation data are not included.
Source: Utah State Parks

Figure 17: Year-Over Change in Park Visitation, 2015–2021



Source: National Park Service and Utah State Parks

Figure 18: Utah Skier Days, 2000/2001–2020/2021



Source: Ski Utah

Ski Industry

Utah's 2019–2020 ski season ranked second for skier spending ($1.55 billion) and fifth for number of skier days despite being cut short by the COVID-19 pandemic. Prior to and early on in the 2019–2020 ski season, the Utah Office of Tourism (UOT) continued its "Mountain Time" marketing campaign for its third year. According to Strategic Marketing & Research Insights, the UOT's winter ad campaign generated 135,000 ad-influenced skier and snowboarder visits and $377.0 million in ad-influenced spending.

The following 2020–2021 ski season operated under pandemic conditions. Utah ski resort managers employed creative measures to address client safety, including mask mandates, increased take out dining options, and social distancing measures. As a result, Utah's 2020–2021 was the busiest ski season on record with 5.3 million skier days (see Figure 18). According to resort managers, skier turnout was heavily local with many at-home workers taking advantage of season passes and off-peak days. Skier spending during the 2020–2021 season is unknown as the traditional on mountain economic survey was not collected due to the pandemic.

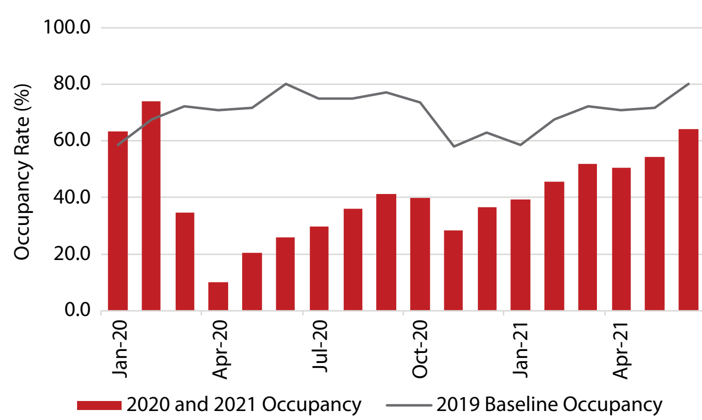
Conferences & Conventions

The COVID-19 pandemic greatly impacted Salt Lake's business travel industry, or conference and convention sector. Because COVID safety concerns kept people away from urban centers and crowded places, large business conferences and convention bookings endured mass cancellations. As a result, show and meeting attendees, and sporting/special-event visitors, spent an estimated $80.4 million in Salt Lake County's economy—a 75.7% year-over decline. With quick thinking, the city's convention and visitor's bureau, Visit Salt Lake, adjusted by pivoting their 2020 marketing goals and plans. They shifted their focus to hosting in-person and virtual site inspections, prioritizing "short business" sales (events meant to actualize in 2021/2022), and generating a "Meet in Utah" promotion that offered financial incentives to organizations willing to book meetings in 2021. Figure 19 shows the pandemic's significant impact on downtown Salt Lake City's hotel accommodation sector by comparing 2020/2021 downtown occupancy rates with occupancy rates from 2019. Although occupancy rates are slowly rebounding in Salt Lake City, they are still lagging 20% behind 2019 baseline rates. Meanwhile, work continued on Salt Lake's convention center hotel in anticipation of more conventions and business meetings once pandemic restrictions end.

Sundance Film Festival

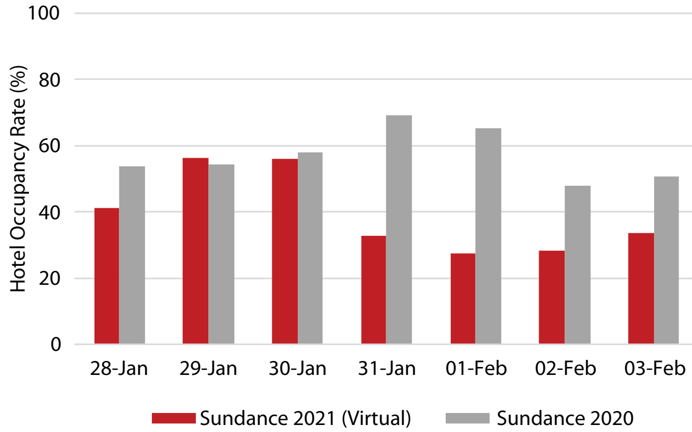
Each January, Park City holds the Sundance Film Festival, which draws a large number of out-of-state visitors to Utah. Since 2017, Y² Analytics has conducted economic impact studies of the festival. Over the past three years, the festival's nonresident attendee share has decreased from one-in-two attendees to one-in-three. In late January 2020, which was prior to COVID,

Figure 19: Downtown Salt Lake City Hotel Occupancy, 2020 and 2021 vs. 2019 Baseline



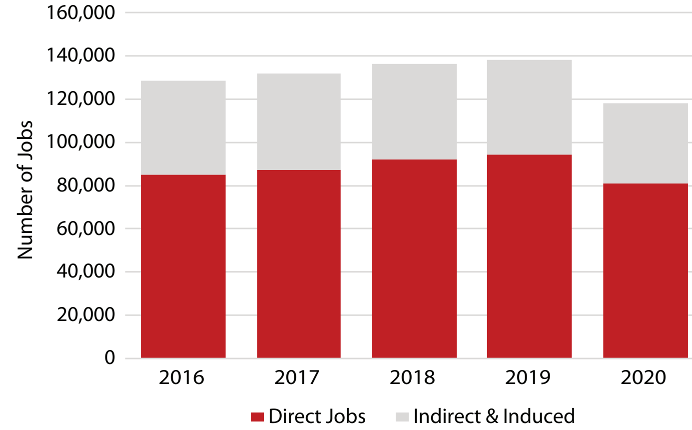
Source: Kem C. Gardner Policy Institute analysis of STR, Inc., data

Figure 20: Summit County Hotel Occupancy Rates, 2020 vs. 2021



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

Figure 21: Utah Travel & Tourism Jobs, 2016–2020



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.

nonresident festival spending of $149.1 million was down 9.5% from the prior year. In January 2021, during the height of the pandemic, Sundance transitioned from an in-person event to a virtual event. Figure 20 compares Park City hotel occupancy rates during the week of the virtual film festival (2021) with the week of the pre-COVID, in-person festival (2020). Summit County collected $1.3 million in transient room taxes in 2021, down from $2.1 million in January 2020, or a 39.2% year-over decrease.

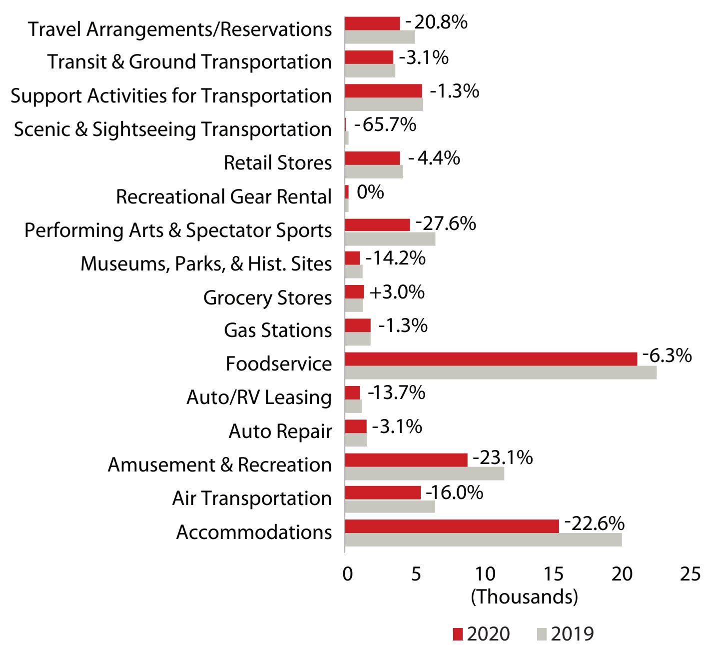
Travel & Tourism Employment

Visitor spending directly and indirectly generates and supports Utah jobs. In 2020, the $7.07 billion in direct visitor spending generated 82,100 direct jobs and supported around 37,500 additional indirect and induced jobs, summing to 119,600 total jobs statewide (down 13.5% from 2019) (see Figure 21). When considered as its own employment sector, travel and tourism ranked seventh in Utah based on the number of direct jobs by major industry group.

The top three tourism-related sectors that suffered the greatest job losses in 2020 were the accommodations sector (–4,536 jobs), the arts, entertainment, and recreation sector (–2,671 jobs), and the performing arts sector (–1,808 jobs). The foodservice, travel arrangements and reservation services, and air travel employment sectors were also heavily impacted (see Figure 22).

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 33.1% (see Figure 23). In 2020, private leisure and hospitality jobs in every county in Utah, except Rich County, declined year-over-year. Salt Lake County suffered the greatest leisure and hospitality job loss (–10,975), followed by Summit County (–1,924), and Utah County (–1,528) (see Figure 24).

Figure 22: Direct Travel & Tourism Jobs, 2019 vs. 2020



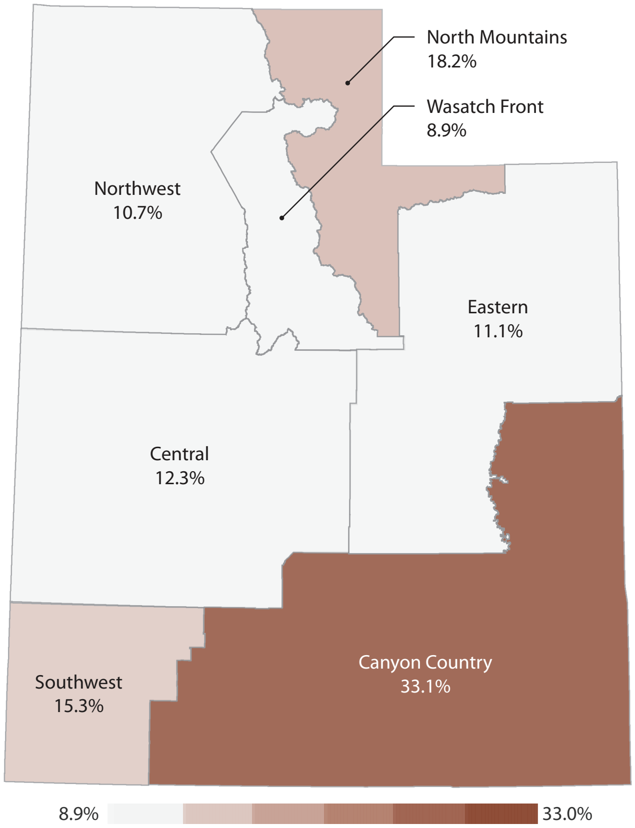
Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics and Utah Department of Workforce Services data.

Tax Revenue

In 2020, the $7.07 billion in direct visitor spending, which led to $12.28 billion in total visitor-related spending through indirect and induced spending effects, generated an estimated $1.16 billion in state and local tax revenues, or a 17.9% year-over decrease (see Figures 25–26). The reason that tax revenue decreases do not match the decreases in visitor spending is due to transportation sales not being taxed and the addition of new and/or higher state and local sales tax rates enacted over time.

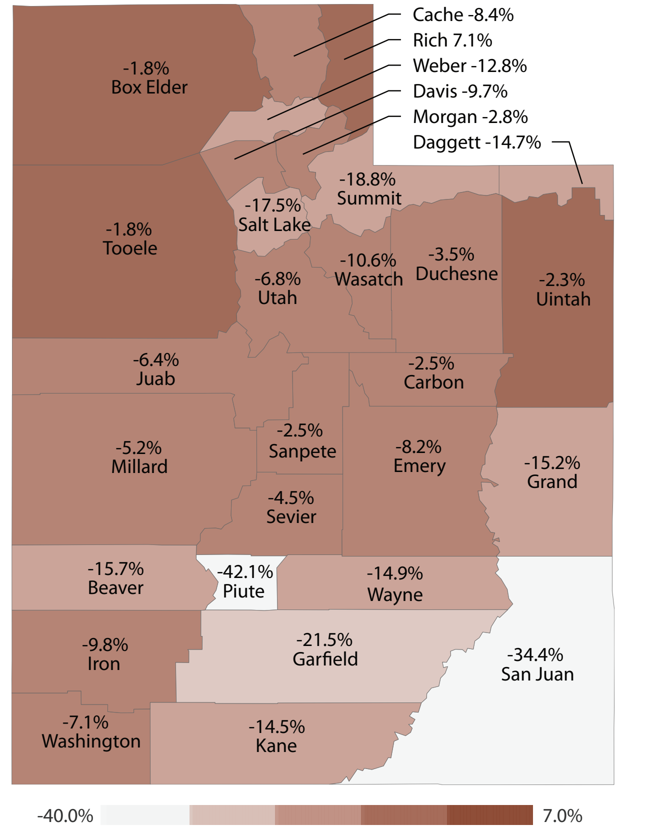
Regionally, the Wasatch Front took the biggest hit from the pandemic, experiencing a 42.1% decline in county transient room tax revenue, or $12.3 million less than in 2019 (see Figure

Figure 23: Leisure & Hospitality Job Share by Travel Region, 2020



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

Figure 24: Change in Leisure & Hospitality Jobs, 2019-2020



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

27). For perspective, in 2019, the Wasatch Front collected 40.8% of statewide collections compared with 31.5% of total statewide receipts in 2020 (see Figure 28). Transient room tax revenue in Canyon Country was down 24.4% in 2020, an annual loss of $3.2 million. Conversely, the Southwest region, which includes Iron and Washington counties, fared the best during the pandemic with only a 1.5% decrease in county year-over lodging taxes, or a deficit of $151,000. The popularity of Zion National Park and southern Utah's state parks kept visitation strong in southwestern Utah. On a countywide basis, Salt Lake, Summit, and Grand counties took the biggest hits from the pandemic with year-over decreases of $10.1, $1.5, and $1.2 million in transient room tax revenue, respectively. Rich County was one of a few rural counties to see year-over growth in lodging taxes from 2019–2020, with a 36.4% increase in transient room tax revenue, or an additional $152,000 (see Figure 29 and Table 6).

The pandemic impacted Utah travel and tourism seasonality as well (see Figure 30). The greatest year-over variability took place in Canyon Country, Southwestern Utah, and along the Wasatch Front. Notably, visitation in Utah's national park regions of Canyon Country and Southwest Utah dropped off during the second quarter of 2020 due to temporary COVID-related park closures; however, park visitation resumed and even surpassed

Figure 25: Total Travel and Tourism-Generated Tax Revenue, 2020

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

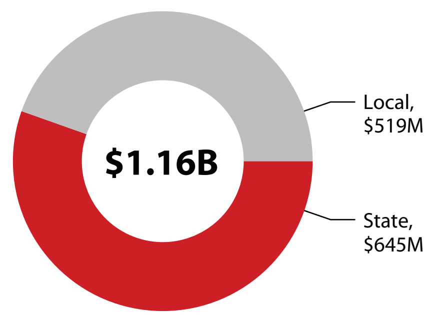
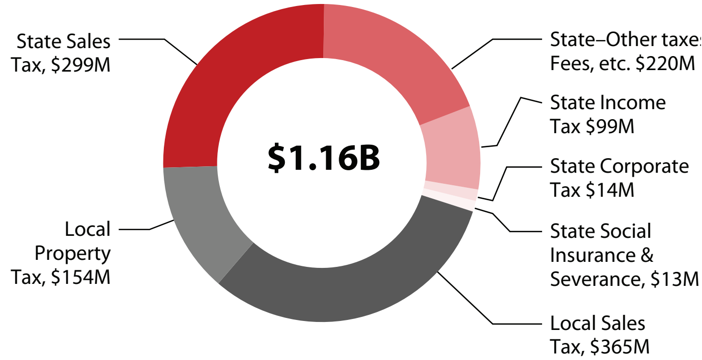
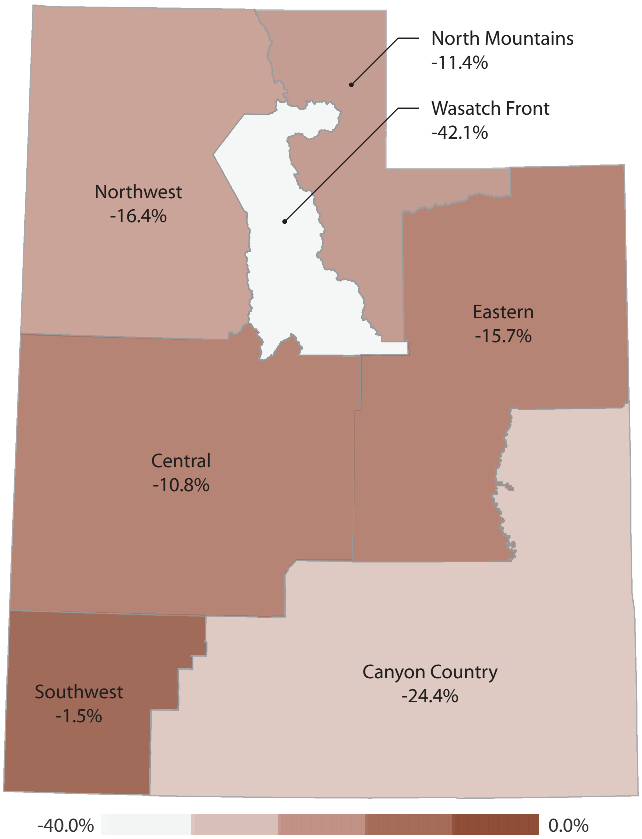


Figure 26: Total Travel and Tourism-Generated Tax Revenue by Tax Type, 2020



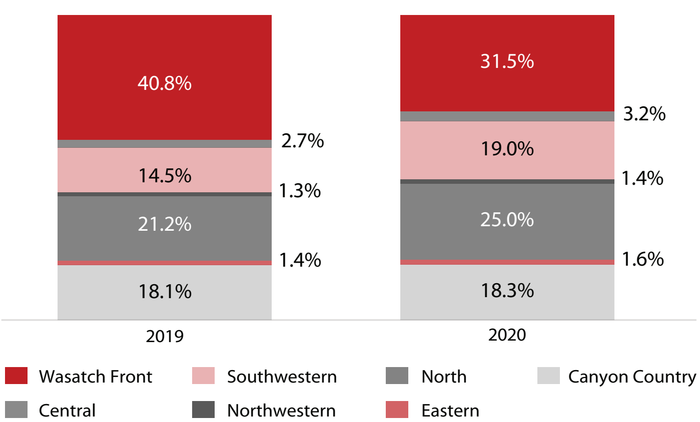
Source: Kem C. Garnder Policy Institute analysis of Tourism Economics and Utah State Tax Commission data

Figure 27: Percent Change in Transient Room Tax Revenue by Travel Region, 2019–2020



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

Figure 28: County Transient Room Tax Revenue Shares by Travel Region, 2019 vs. 2020



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

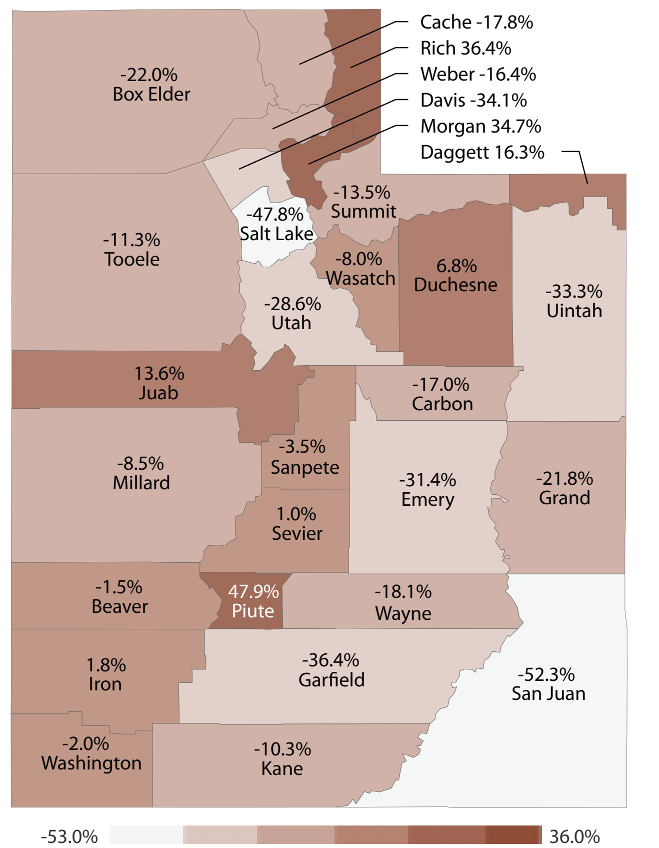
baseline visitation during the third and fourth quarters of 2020. Along the Wasatch Front, visitation dropped drastically during the second quarter, and failed to return to 2019 baseline visitation during quarters three and four. In contrast, Summit County maintained a similar seasonality pattern in 2020 compared with 2019 due to the timing of the pandemic onset, which took place closer to the end of the 2019–2020 ski season.

Hotel Occupancy & Rates

The average annual statewide hotel occupancy rate in 2020 (46.7%) was down 26.3% from 2019 (63.4%). Statewide occupancy dropped to its lowest point in April 2020, down 67% from 2019, but had returned to baseline a year later and had once again surpassed 2019 occupancy by the summer of 2021 (see Figure 32).

Average daily hotel room rates (ADRs) and revenue per available room also took a hit during 2020 and were down 15.9% and 35.7%, respectively. Again, due to COVID in 2020, Utah hotels experienced the highest average statewide occupancy in February, when normally they experience their highest occupancy rates in March (spring break) and June–

Figure 29: Percent Change in Transient Room Tax Revenue by County, 2019–2020



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

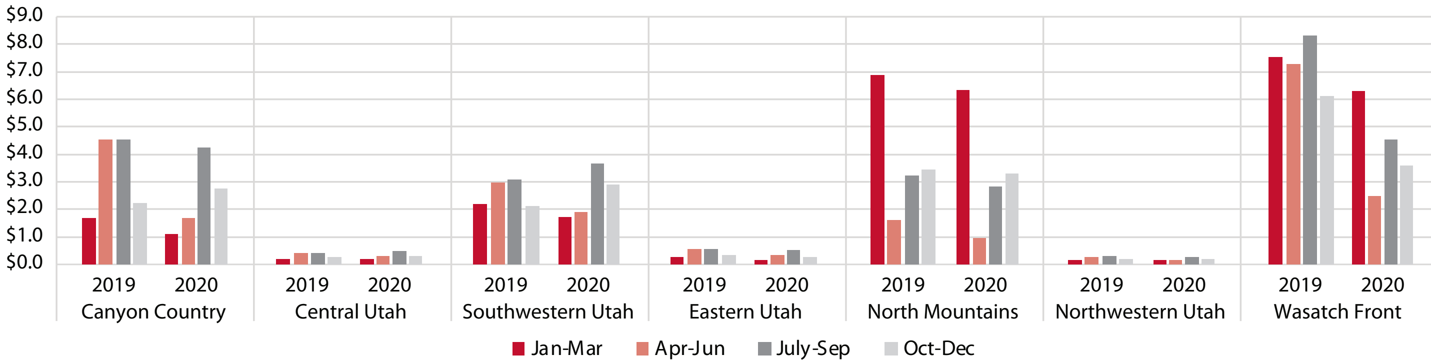
Table 6: County Transient Room Tax Revenue, Top Ten Counties, 2020

(millions of dollars)

County	Amount	County	Amount
Salt Lake	$11.0	Kane	$2.8
Summit	$9.8	Wasatch	$2.2
Washington	$8.7	Weber	$1.6
Grand	$4.4	Iron	$1.5
Utah	$3.0	Garfield	$1.4

Source: Utah State Tax Commission

Figure 30: Quarterly County Transient Room Tax Revenue by Travel Region, 2019 vs. 2020



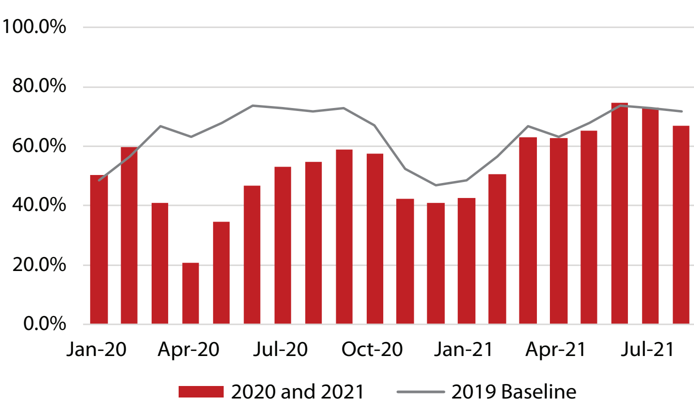
Source: Kem C. Gardner Policy Institute analysis of Utah State Tax Commission data

September (summer break). Weber County had the highest annual average occupancy rate (56.4%) and Uintah had the lowest (34.4%); Summit County had the highest average annual ADR of $249 (compared with $269 in 2019) and Beaver County had the lowest ($66), which did not change much from 2019 ($67). As for year-over percent change in ADR, only the Rich-Cache county grouping experienced a year-over increase in ADR while all other counties for which hotel data is available experienced year-over declines (see Figure 32).

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 to advertise their rental properties to a global 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 online for their rental (including all fees and taxes). According to data intelligence company Transparent, there were an average of 15,706 available short-term rentals statewide in 2019 and 20,634 in 2021—a 23.9% increase over two years. Figure 33 shows the growth in number of short-term rentals and their ADRs from 2019 to 2021; Figures 34 and 35 show the percent change in short term rental listings and the net difference in STR listings per capita by county for the same time period. The average number of short-term rentals increased in every county in Utah from 2019 to 2021.

Figure 31: Statewide Hotel Occupancy, January 2020–August 2021 vs. 2019 Baseline

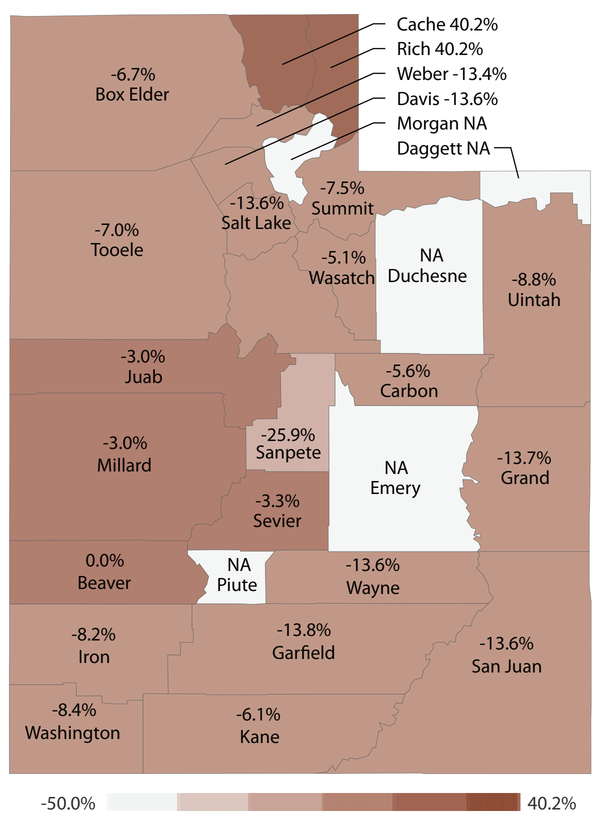


Note: Republication or other re-use of this data without the express written permission of STR, Inc. is strictly prohibited.
Source: Kem C. Gardner Policy Institute analysis of STR, Inc. data

Travel & Tourism Industry—Other Indicators

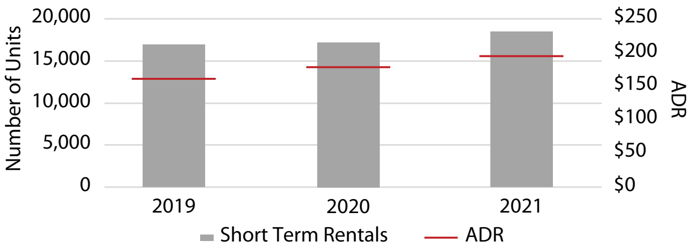
The COVID-19 pandemic hit Utah's tourism-related sectors hard in 2020. Private jobs, wages, and sales decreased in every leisure and hospitality sector highlighted in this report (see Tables 7–10).

Figure 32: Percent Change in Hotel Average Daily Rates by County, 2019–2020



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

Figure 33: Utah's Short-Term Rental Supply and Average Daily Rate (ADR), 2019–2021



Note: rental subtypes listed as "Bed & Breakfast" and "Other" have been omitted as they represent more traditional accommodation models; based on averages between January and July of each year.
Source: Kem C. Gardner Policy Institute analysis of Transparent data

Table 7: Utah's Passenger Air Industry, 2016–2020

Year	Total Deplaned Passengers	Annual Change	Emp.	Annual Change	Wages (Millions)	Annual Change
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%	7,416	8.0%	$723	16.7%
2020	6,273,574	-53.2%	6,599	-11.0%	$689	-4.7%

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 8: Utah's Arts, Entertainment, and Recreation Industry, 2019–2020

Year	2019	2020	Change
Private Employment	25,892	20,934	-19.1%
Private Wages ($Millions)	$756	$669	-11.5%
Public Employment	7,721	6,510	-15.7%
Public Wages ($Millions)	$130	$131	0.5%
Taxable Sales ($Millions)	$988	$732	-25.9%

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 Accommodations Industry, 2019–2020

Year	2019	2020	Change
Employment	21,879	16,987	-22.4%
Wages (Millions)	$613	$471	-23.1%
Taxable Sales (Millions)	$2,183	$1,627	-25.5%

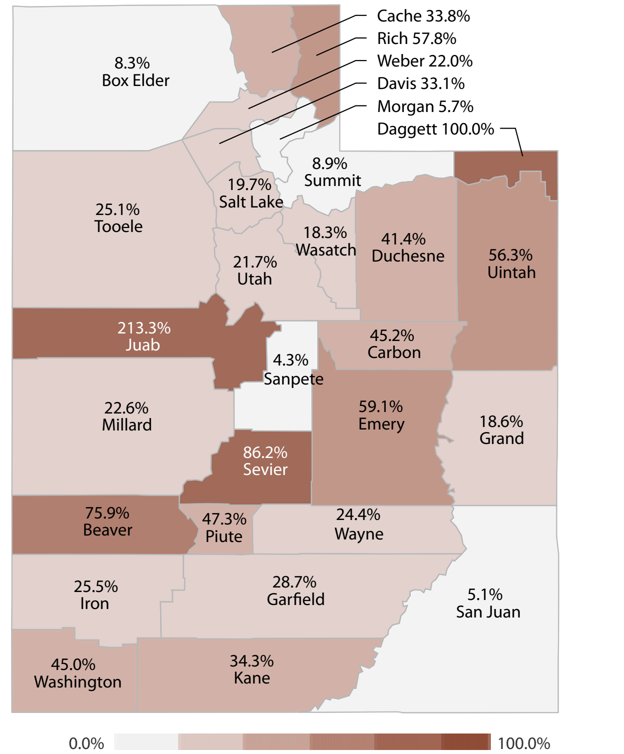
Note: includes full- and part-time employment; does not include proprietors.
Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics and Utah State Tax Commission data

Table 10: Utah's Food Services Industry, 2019–2020

Year	2019	2020	Change
Employment	105,607	95,551	-9.5%
Wages (Millions)	$1,848	$1,740	-5.8%
Taxable Sales (Millions)	$5,475	$5,009	-8.5%

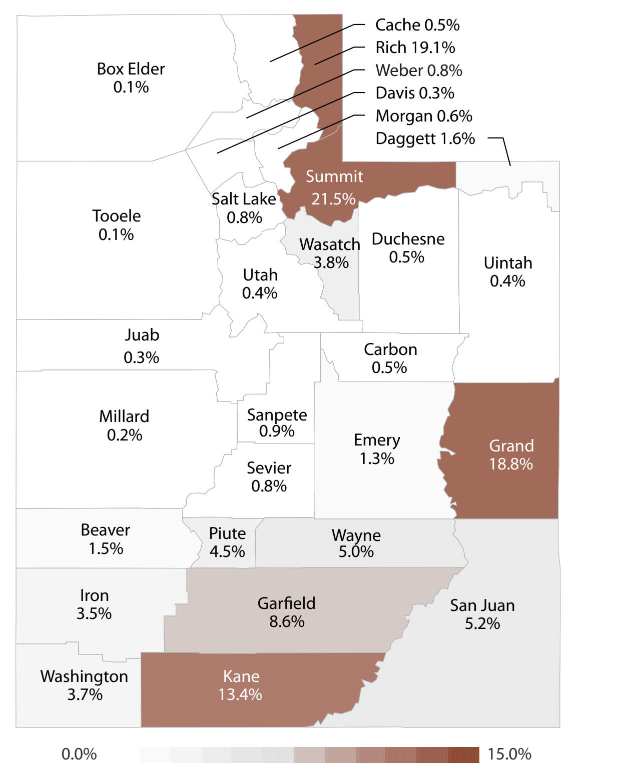
Note: includes full- and part-time employment; does not include proprietors.
Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics and Utah State Tax Commission data

Figure 34: Percent Change in Number of Short-Term Rental Listings, 2019–2021



Note: rental subtypes listed as "Bed & Breakfast" and "Other" have been omitted as they represent more traditional accommodation models; based on averages between January and July of each year.
Source: Kem C. Gardner Policy Institute analysis of Transparent data

Figure 35: Short-Term Rental Listings as Share of Total Housing Units, 2021



Note: rental subtypes listed as "Bed & Breakfast" and "Other" have been omitted as they represent more traditional accommodation models; based on January to July average.
Source: Kem C. Gardner Policy Institute analysis of Transparent and U.S. Census Bureau data

Current Issues

Equity, Diversity, and Inclusion

Equity, diversity, and inclusion—often referred to as "EDI" (or sometimes "EDIA" or "DEI")—has become an important discussion topic in business, government, education, and healthcare, as well as in our communities and homes, as both historical and recent events have highlighted social inequities. In 2020, EDI principles and practices entered the collective consciousness, encouraging social reflection and action. EDI has also entered the travel and tourism realm in a variety of ways. For instance, leisure and hospitality business owners are making new commitments to remove hiring biases, onboard more diverse staff, and expand their visitor profile, especially in situations where visitor demographics are not representative of the general population. Travel and tourism leaders are assessing whether or not the products, services, and experiences they promote are indeed equitable and inclusive to a diverse population, and, if not, are taking actionable steps to ensure EDI best practices.

Climate Change

Climate change will continue to impact Utah's ecosystem and its travel and tourism industry. A recent scientific study reported double the rate of warming in U.S. national parks compared with all of the U.S. (Gonzalez et al., 2018). Continually increasing air and water temperatures tend to produce earlier and more severe storms, glacial/snow melting, and heat waves/droughts. Rising temperatures can shorten the ski season and the summer tourist season. Severe weather events (e.g., windstorms, floods, and mudslides) can disrupt travel and impact traveler safety. Scientists agree that reducing carbon dioxide emissions is the most effective way to offset climate change, and the travel industry is a large carbon dioxide contributor (e.g., airplanes, boats, cars). Utilizing cleaner energy alternatives, carpooling, and replacing fossil fuel–burning vehicles with 100% electric vehicles are a few ways to help offset carbon dioxide emissions.

Seasonal Housing Shortage

Across the West, resort and recreation towns have faced employee housing availability and affordability constraints. As Utah travel and tourism increases, so does the leisure and hospitality job demand. Because the number of leisure and hospitality jobs can increase 50%–150% from off-season to tourist season, meeting the ever-changing job demand requires a combination of local and nonlocal workers; and these employees need housing. Skyrocketing housing costs in Utah and across the West have left much of the housing market unaffordable for many. Housing availability is another issue. The conversion of long-term employee rentals into short-term visitor rentals has intensified the employee housing crisis. When a property owner can make a typical month's rent in a matter of days by renting to tourists, there is little incentive to rent longer-term to the leisure and hospitality workforce. Unfortunately, if seasonal workers cannot secure housing, hospitality businesses could face severe understaffing and eventual closure. Currently, Western resort and recreation towns, including Utah's Park City, are addressing the employee housing conundrum in the form of public-private partnerships that share a commitment to finding ways to provide available and affordable employee housing.

Hospitality Labor Shortage

Lately, there have been several media mentions about short-staffed hotels and restaurants. Economists describe several reasons for this hospitality employment deficit. As the hardest-hit sector in 2020, the tourism industry suffered the greatest number of layoffs compared with other major industries. Many furloughed employees were able to collect unemployment checks during the pandemic—benefits that did not expire until summer 2021. However, benefit expiration has not completely prompted an employee return. While some employees left the hospitality industry during the pandemic to care for family members, others were laid off. Of those that left, some have feared returning to the social nature of hospitality work, while others have opted for a career change altogether, seeking employment that offers improved working conditions and increased pay.

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, comprising 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 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, Morgan, 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 the state, 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.).

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 Gardner Institute customized a travel and tourism economic impact model for Utah. This customized model utilizes 2019 IMPLAN economic impact software as well as U.S. Bureau of Labor Statistics, the U.S. Bureau of Economic Analysis, and Utah State Tax Commission data.

Travel Terms to Know

Amenity Migration *(noun)*: the movement of people to perceived desirable regions, usually for non-economic reasons, such as a physical or cultural environment that is seen as more beautiful, tranquil, or inspirational than their current, usually urban environment.

Digital Wanderer *(noun)*: a person who earns a living working online in various locations of their choosing (rather than a fixed business or residential location).

Zoom Town *(noun):* a community that experiences a significant population increase as remote work becomes more popular, especially in the wake of the COVID-19 pandemic. The shift is expected to have significant economic implications. The name is a play on "boomtown" and the name of the web conferencing tool Zoom.

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