

The State of Utah's Travel and Tourism Industry

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April 2016



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Introduction and Summary

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

In 2014, travelers spent a record \$7.98 billion in Utah, generating an estimated \$1.09 billion in total state and local tax revenue. In fact, domestic and international visitor spending (\$6.8 billion) exceeded Utah’s largest exports of primary metals (\$4.2 billion) and computers and electronics (\$2.4 billion), making travel and tourism the largest “export” industry in the state. Travel and tourism generated an estimated 137,200 direct, indirect, and induced jobs in 2014 with an estimated \$3.9 billion in wages.¹ While total Utah skier days were down five percent during the 2014/2015 ski season, Utah’s five national parks experienced record visitation in 2014. In 2014, visitors purchased more hotel rooms and spent more money on arts, entertainment, recreation, and restaurants in Utah than ever before.

This report includes the most recent travel and tourism-related data that was available at the time of publication; in most cases, data reflect 2014 activity.

Utah Travel Regions

For purposes of this report, the Kem C. Gardner Policy Institute divided Utah into seven travel regions, organized by geographic areas and counties. Figure 1 shows each Utah travel region with its share of the state's 2014 population. The Wasatch Front, Utah's metropolitan hub, is bordered by mountains on the east and lakes on the west.² In general, travelers visit the Wasatch Front to ski, attend arts and cultural events, visit local attractions, attend conventions and trade shows, and shop and dine. The North Mountains includes large portions of Wasatch-Cache and Uinta National Forests, mountain topography, and eight state parks.³ Eastern Utah offers trout fishing, boating, and river rafting opportunities in and around Flaming Gorge National Recreation Area, as well as abundant paleontological, archaeological, and geological sites further south.⁴ Northwestern Utah provides basin and range geography, with rugged mountains, endless vistas, and the unique Great Salt Lake ecosystem.⁵ Central Utah, located in the "heart" of the state, comprises rolling hills, agricultural lands, historic sites, and popular ATV trail systems.⁶ Canyon Country, which is home to four of Utah's five national parks, attracts visitors to its unique geology, recreational opportunities and scenic beauty.⁷ Dixie in southwestern Utah, is the gateway to Zion National Park and is the warmest region in the state, making it a fine area for year-round golf, outdoor theater, and general recreation and leisure.⁸

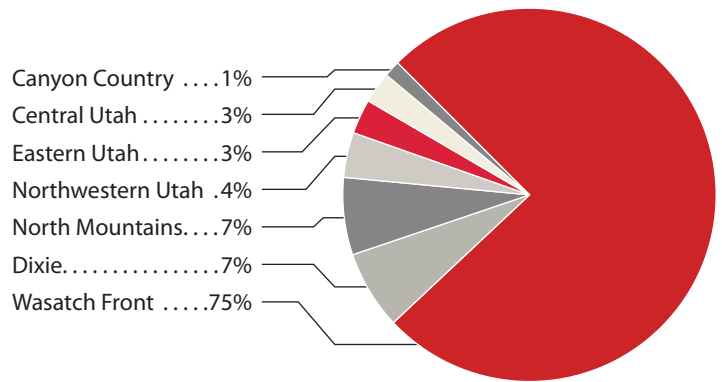
Utah Travel and Tourism in a National Context

In 2014, the travel and tourism industry was the number one export industry in both the U.S. and Utah with steady growth expected to continue into the near future. Domestic and international visitation increased to record levels, both nationally and statewide, due in large part to a healthy economy and relatively low gas prices. In 2014, TNS Global (TNS), a national travel research firm, reported a 12 percent year-over increase in domestic person-trips (leisure and business) to Utah. In addition, Utah national park visitation – a good indicator of international traveler activity – grew 14 percent from 2013 to 2014.

The U.S. Department of Commerce estimated that international overnight visitors to the U.S. would reach a record 78 million in 2015 (up four percent from 2014). In addition, the Commerce Department predicted an almost 30 percent increase in international visitation by 2020 with Mexico, China, and Canada accounting for a majority of that inbound travel. In regards to high-growth markets, visitation from China is forecasted to increase more than 150 percent in the U.S. by 2019, followed by Colombia (+70 percent), and India, Brazil, and Sweden (+30-40 percent). As for international visitation to Utah, the Salt Lake City International Airport reported an 81 percent year-over increase in deplaned international visitors during the summer of 2015 after adding a daily nonstop flight from SLC to Amsterdam.⁹

Figure 1

Census Population Shares by Utah Travel Region, 2014



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

Table 1

Western States' Share of Private Leisure and Hospitality Employment, 2014

| | Leisure & Hospitality Employment | Total Employment | % Share |
|---------------|----------------------------------|------------------|-------------|
| United States | 14,764,000 | 144,891,000 | 10.2% |
| Montana | 60,698 | 470,625 | 12.9% |
| Wyoming | 35,550 | 304,323 | 11.7% |
| Colorado | 302,610 | 2,596,484 | 11.7% |
| Arizona | 288,061 | 2,672,673 | 10.8% |
| New Mexico | 91,457 | 853,031 | 10.7% |
| California | 1,769,039 | 16,688,639 | 10.6% |
| Oregon | 183,769 | 1,801,023 | 10.2% |
| Idaho | 66,064 | 686,595 | 9.6% |
| Utah | 128,959 | 1,382,435 | 9.3% |
| Washington | 300,561 | 3,283,186 | 9.2% |

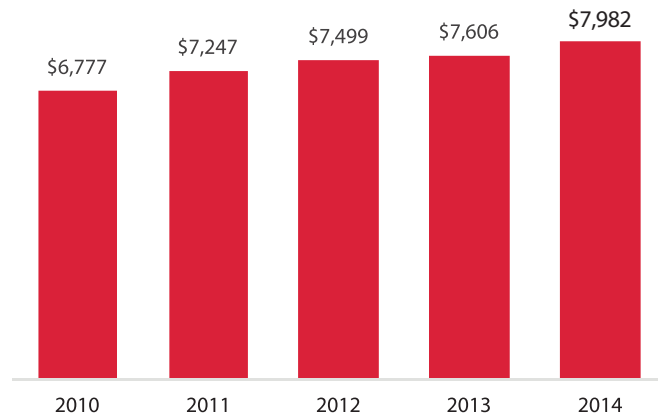
Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics data

According to the U.S. Travel Association (USTA), domestic and international leisure and business travelers spent an estimated \$928 billion in the U.S. in 2014, generating 8 million direct jobs, \$222 billion in payroll, and \$142 billion in tax revenue (five to six percent year-over increases). USTA stressed the importance of travel and tourism on the U.S. job market and noted that, in 2014, one out of nine jobs in the U.S. was dependent on travel and tourism, making travel among the top 10 industries in 49 states and D.C. in terms of employment. In a national and regional context, Utah's nine percent share of private leisure and hospitality employment to total private employment is in line with the U.S. (10 percent) and other western states (see Table 1).

Utah Visitor Spending and Profile

The travel and tourism industry makes significant contributions to Utah's state and local economies. TNS provides the Utah

Figure 2
Total Visitor Spending (Millions of 2014 Dollars)



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

Office of Tourism (UOT) with ongoing Utah visitor spending and demographic profile information. According to TNS, in calendar year 2014, travelers spent a record \$7.98 billion in Utah. Figure 2 shows TNS visitor spending estimates from 2010 to 2014. When adjusted for inflation, visitor spending increased 18 percent from 2010 to 2014 and five percent from 2013 to 2014. The \$7.98 billion in spending includes direct nonresident (\$6.8 billion) and resident (\$1.1 billion) leisure and business traveler spending. According to TNS, nonresident travelers spend, on average, two to three times as much money during their Utah visit than resident travelers. Therefore, understanding who visits Utah from outside of the state and what motivates them to visit informs domestic and international tourism marketing.

Tourism Marketing

In the fall of 2014, the UOT utilized dollars from the state's Tourism Marketing Performance Fund to launch its new "Find Your Greatest[®]" winter marketing campaign and, in the spring of 2015, to re-run its highly successful "Mighty 5[®]" marketing campaign. For both campaigns, the UOT placed a variety of ads (TV, digital, and out of home) in major cities across the U.S. to attract nonresident Utah visitors. According to Strategic Marketing and Research Insights (SMARInsights), the most recent "Find Your Greatest[®]" ad campaign was stronger than the prior "Greatest Snow on Earth[®]" ad campaign at communicating key messages and generating interest in travel to Utah. The "Find Your Greatest[®]" campaign showed more media overlap (e.g. a greater number of people recalled seeing more than one type of ad from the campaign) and it received stronger evaluative ratings than Colorado's winter ads during the first phase of the campaign. At the end of the campaign's second phase, SMA-RIInsights reported positive 2014/2015 winter advertising effectiveness and return on investment research results. They found that UOT's winter advertising campaign influenced travel from all markets, producing the highest incremental travel in the

Table 2
Total Visitor Spending by Spending Category, 2014

(Millions of Dollars)

| | Nonresident | Resident | Total |
|---|----------------|----------------|----------------|
| Auto Transportation (Gasoline, car rental, parking, etc.) | \$2,112 | \$549 | \$2,661 |
| Public Transportation (airfare, train, bus, taxi, etc.) | \$1,568 | \$117 | \$1,685 |
| Lodging | \$1,149 | \$113 | \$1,262 |
| Food/Beverage/Dining (excluding groceries) | \$1,050 | \$148 | \$1,198 |
| Shopping/Gifts/Souvenirs | \$393 | \$99 | \$492 |
| Groceries | \$209 | \$76 | \$285 |
| Entertainment/Admissions | \$120 | \$47 | \$167 |
| Other | \$123 | \$9 | \$132 |
| Amenities (golf fees, spa, health club, ski passes, etc.) | \$87 | \$13 | \$100 |
| Total | \$6,811 | \$1,171 | \$7,982 |

Source: TNS Global

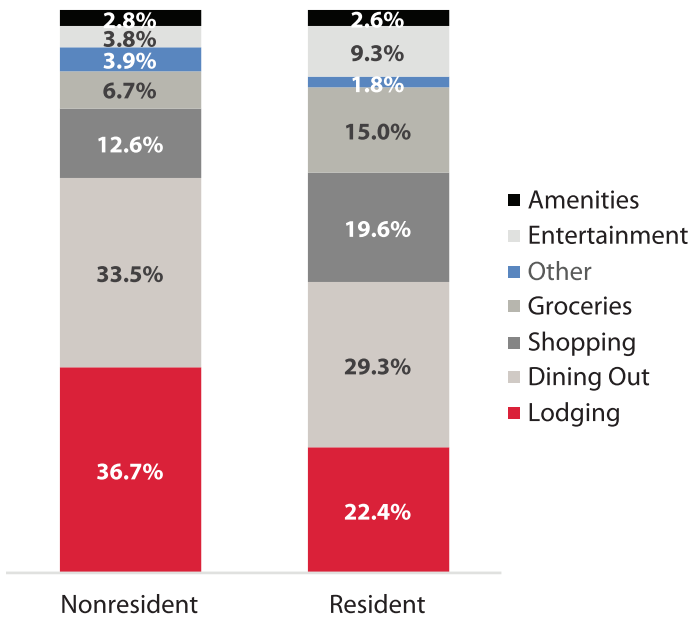
past four years and generating \$198 million in visitor spending – a six percent year-over increase. Likewise, according to SMA-RIInsights, the spring 2015 "Mighty 5[®]" campaign received some of the highest evaluative ratings ever observed and generated 1.7 million Utah trips and close to \$2 billion in visitor spending.

In an attempt to attract a greater number of international visitors, who tend to stay longer and, thus, spend more money than domestic visitors, the UOT recently produced in-language content ads. These ads will be shown in several countries (China, France, Germany, Mexico, and Canada) as a way to extend a warm welcome to Utah.

Domestic Visitation

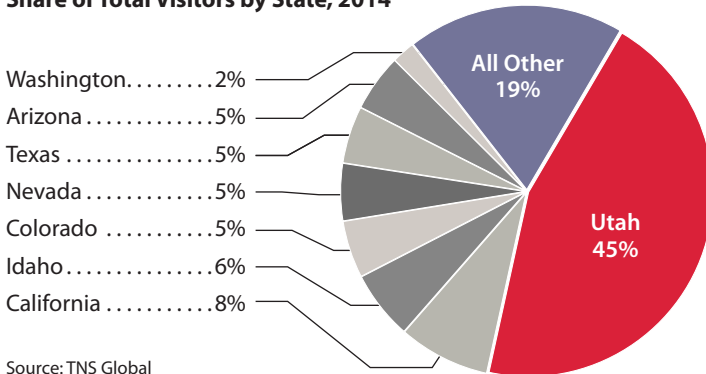
TNS reported that in calendar year 2014 the majority of TravelsAmerica survey respondents visited Utah for leisure, drove their own vehicle (vs. flew), and stayed three to four nights on average. In fact, according to TNS, Utah visitors are the most likely to travel with children compared to those who venture to surrounding western states. TNS noted that, on the 2014 TravelsAmerica survey, respondents who visited Utah traded the activity previously defined on the survey as "rural sightseeing" (2013) for the newly added option of "hiking/biking/canyoneering" (2014). In addition to visiting friends and family, during their stay in Utah, the majority of nonresident respondents visited national and state parks, hiked and backpacked, shopped, explored rural Utah, and visited historic sites and churches. Table 2 shows total visitor spending by spending category. Both nonresident and resident travelers spent the most money on transportation, whether public (airline, rail, bus) or auto-based. When transportation costs are removed, nonresidents spent larger

Figure 3
Visitor Spending Shares by Spending Category, 2014



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

Figure 4
Share of Total Visitors by State, 2014

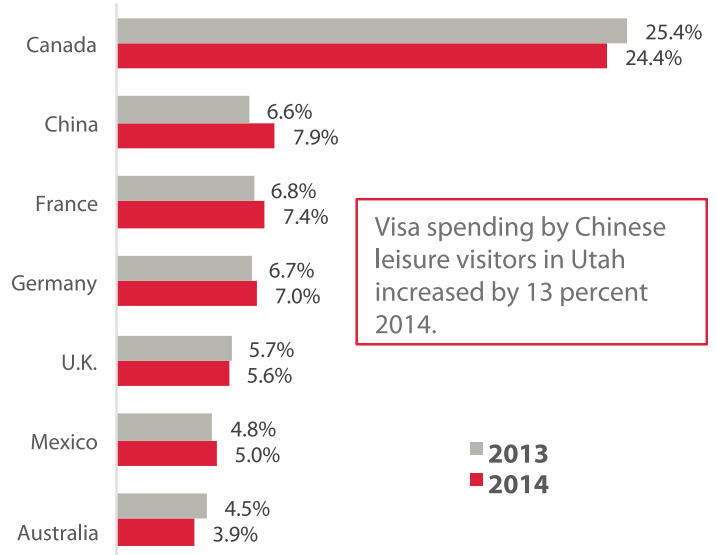


Source: TNS Global

shares of their total spending on lodging and dining out whereas resident travelers spent larger shares of their total spending on groceries, shopping, and entertainment (see Figure 3).

In the 2014 TravelsAmerica Visitor Profile Report, TNS highlighted the fact that not all of Utah’s key domestic source markets border Utah (e.g. California and Texas), which is rather unique for a western state (see Figure 4). According to TNS, the greatest numbers of nonresident visitors arrived from Phoenix/Prescott, Las Vegas, Boise, Los Angeles, and Denver. Survey data also indicated that Utah’s largest cities, such as Salt Lake City and Provo, attracted the most nonresident visitors. Utah resident travelers, on the other hand, were more likely to visit smaller Utah towns like St. George and Cedar City. Despite how or where they traveled, 85 percent of nonresident, and 89 percent of resident, visitors reported to be “extremely/very satisfied” with their Utah travel experience.

Figure 5
Share of International Visitor Card Spending by Country



Visa spending by Chinese leisure visitors in Utah increased by 13 percent 2014.

Note: Estimates are based on and extrapolated from aggregate depersonalized card usage data provided for the calendar years of 2013 and 2014.
 Source: Kem C. Gardner Policy Institute analysis of VisaVue® Travel data

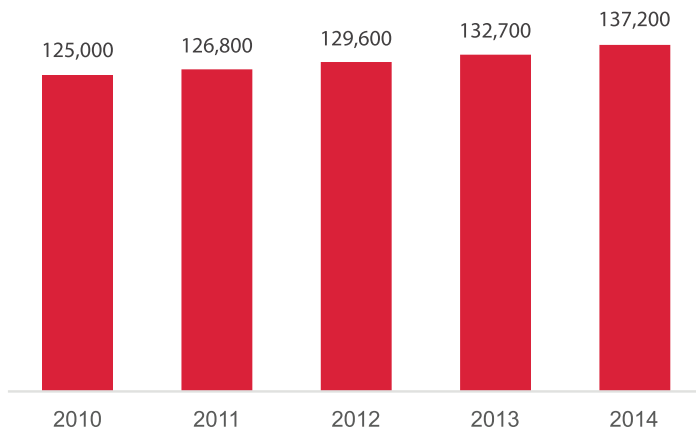
International Visitation

International visitors from many countries visit Utah each year to ski,¹⁰ explore national parks, visit cultural sites, and attend conventions, trade shows, and conferences. In 2014, Utah’s top international leisure markets were Canada, China, France, Germany, United Kingdom, Mexico, and Australia in that order (see Figure 5).¹¹ VisaVue® spending records revealed a healthy 13 percent year-over increase (over \$1 million dollars) in leisure Chinese visitor spending in 2014, maintaining China’s status as a country to watch in the near future. In fact, Attract China, a research group self-described as the “leading gateway to the Chinese traveler,” forecasted that Chinese tourists would spend more than \$15 billion in the U.S. in 2015. According to Attract China, Chinese travelers are becoming more interested in independent travel (vs. tour groups), authentic local experiences (vs. visiting standard “tourist traps”), and booking trips via mobile sites (vs. using a travel agent). Also noteworthy are the number of nonstop flights between China and the U.S., which have more than tripled from 10 total direct flights in 2006 to 35 direct flights in 2014.

Travel and Tourism-Related Employment

Travel and tourism spending supports a significant number of Utah jobs, however, defining travel and tourism-related employment is complex because travel and tourism is not a distinct industry defined by the Bureau of Labor Statistics, such as manufacturing or construction. Instead, the travel and tourism industry is a patchwork of industries, comprised of goods and services purchased by the traveler prior to, during, and even after a trip. Therefore, unlike an export industry such as apparel

Figure 6
Total Tourism-Generated Jobs*



*Direct, indirect, and induced
Source: Kem C. Gardner Policy Institute analysis of Utah Department of Workforce Services data

manufacturing, where goods are produced in one region and exported to another region for consumption, the travel and tourism industry, composed of multiple and diverse industry sectors, provides services and goods to consumers who temporarily visit a region and spend their out-of-state dollars on a touristic experience. Thus, the travel and tourism industry can be thought of as an export industry. As such, Utah's travel and tourism industry, with estimated nonresident revenues of \$6.8 billion, was Utah's largest export in 2014, ahead of primary metals (\$4.2 billion) and computers and electronics (\$2.4 billion).¹³

In 2014, travel and tourism spending supported an estimated 137,200 direct, indirect, and induced jobs, as well as \$3.9 billion in payroll (see Figure 6). The Policy Institute estimated tourism-related employment in Utah by selecting total jobs in nationally-recognized tourism-related industries and weighting them for Utah.¹⁴ Tourism-related employment considered in this report includes jobs in accommodations, automotive and equipment rental (car, RV, and recreational gear), transportation (air, bus, taxi, rail, shuttle, and scenic), travel arrangements, arts, entertainment, recreation, foodservice, parking lots, auto repair, and retail (shopping, gas stations, and groceries). Travel and tourism-supported jobs grew 10 percent from 2010 to 2014 and three percent from 2013 to 2014. Tourism-related wages, however, increased at nearly twice the rate as jobs. Inflation-adjusted tourism-related wages increased 21 percent from 2010 to 2014 and six percent from 2013 to 2014.

Leisure and Hospitality Employment by Region

Travel and tourism-related job and wage data by detailed tourism-related subsector (e.g. air transportation, car rental, charter bus, taxi, and limousine, and recreational gear rental) are often not disclosed at the local level by labor statistics departments due to privacy concerns. Because detailed county

employment data is widely unavailable, it is difficult – if not impossible – to make “apple-to-apple” tourism employment comparisons between Utah travel regions and counties. However, it is possible to make region-to-region and county-to-county employment and wage comparisons for the larger “leisure and hospitality” sector.¹⁵

Calculating a region's share of private leisure and hospitality jobs to total private jobs is one way to estimate the economic significance of the travel and tourism industry to a Utah region or county. When comparing the number of private leisure and hospitality jobs to total private jobs in Utah's seven travel regions, there are significant differences between the regions. For instance, in 2014, 40 percent of all jobs in Canyon Country were in the leisure and hospitality sector, followed by 21 percent in the North Mountains region, and 18 percent in the Dixie region. It is interesting to note that four of Utah's five national parks are in Canyon Country and the fifth national park is in Dixie.¹⁶ Likewise, the North Mountains region is home to four ski resorts, eight state parks, and large tracts of national forest. Wages followed a similar trend with the leisure and hospitality sector accounting for an estimated 29 percent share of total wages in Canyon Country, a 14 percent share in the North Mountains, and a nine percent share in Dixie. In contrast, the leisure and hospitality sector made up only three percent of total jobs in Utah's Eastern region.

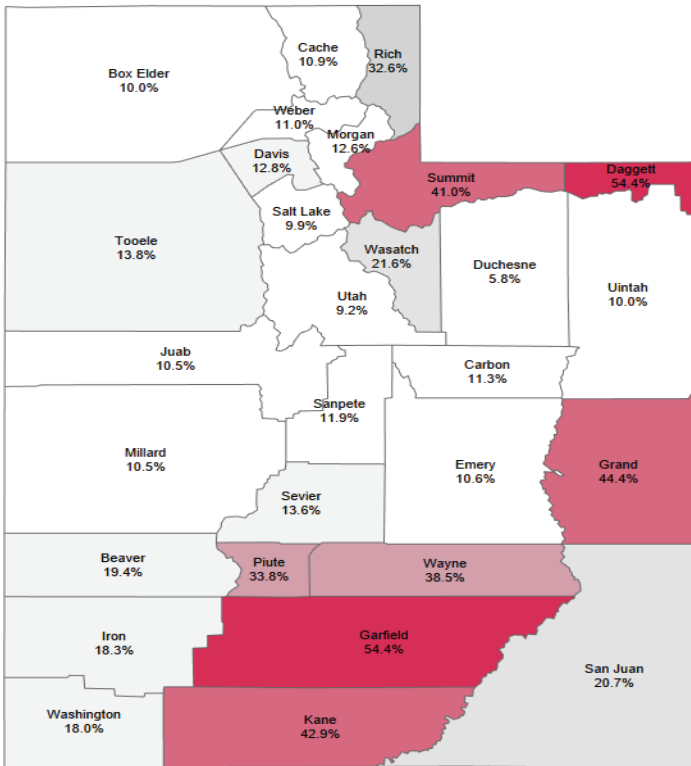
Annual leisure and hospitality jobs increased in all Utah travel regions from 2010 (end of the recession) to 2014. The Dixie region experienced the greatest post-recession growth in the leisure and hospitality sector (25 percent) followed by the North Mountains region (17 percent) and the Wasatch Front (15 percent). Between 2010 and 2014, statewide leisure and hospitality employment grew 16 percent while all other employment grew at a lesser rate of 14 percent.

Leisure and Hospitality Jobs and Wages by County

As for the relative shares of leisure and hospitality jobs and wages at the county level, Daggett County and Garfield County had the greatest shares (54 percent), followed by Grand, Kane, Summit, and Wayne counties (see Figure 7). In fact, the leisure and hospitality sector generated at least 40 percent of total wages in Daggett, Garfield, Grand, Kane, and Summit counties.

From 2010 to 2014, private leisure and hospitality employment grew more than 10 percent in more than half of all Utah counties (15 of 29). Washington County experienced the greatest private leisure and hospitality employment growth (28 percent) post-recession. Washington County's leisure and hospitality sector added 1,294 foodservice jobs, 756 performing arts and spectator sports jobs, and 376 accommodations jobs - or a total of 2,426 leisure and hospitality jobs - in the past five years. Part of this growth may be attributed to Washington County's 10

Figure 7
Leisure and Hospitality Sector Jobs as a Percent of Total Private Employment, 2014



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

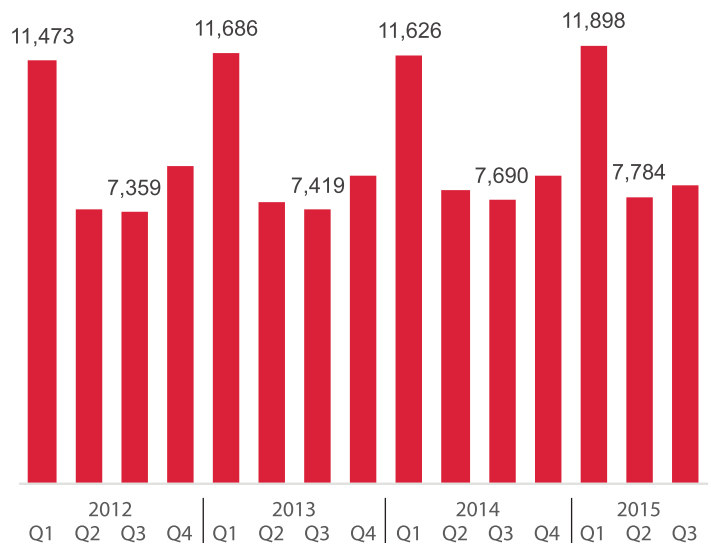
percent increase in population since 2010. Nevertheless, Washington County is the gateway to the ever-popular Zion National Park, which is its largest travel and tourism draw. In addition, the growing popularity of Washington County's second largest travel and tourism draw - the Tuacahn Center for the Arts - may also be reflected in the growth of Washington County's leisure and hospitality employment sector. Due to the continued success of the Tuacahn, which attracts 265,000 annual attendants (a third of which are from out of state), the Washington County Commission recently committed an annual \$325,000 in local tourism-related tax revenue to be used for continued Tuacahn theater maintenance and improvements.

The Seasonal Nature of Travel and Tourism in Utah

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

To determine the seasonality of the travel and tourism industry at the regional or county level, the Policy Institute examined

Figure 8
Summit County: Average Leisure & Hospitality Jobs by Quarter

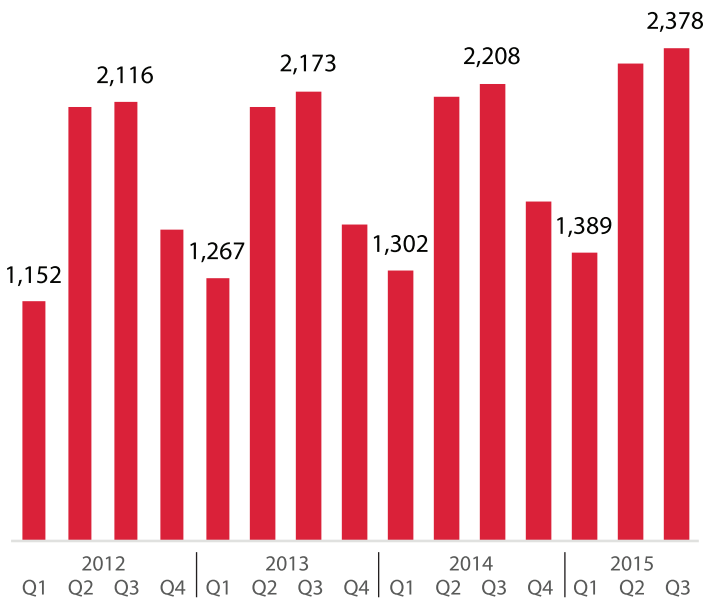


Source: Utah Department of Workforce Services

several years of leisure and hospitality jobs by quarter. Based on quarterly employment data, Summit County, in the Northern Mountains region, experienced well-defined winter seasonality. Summit County has two ski resorts (including Park City, now the largest ski resort in the United States), several winter recreation activity venues, and hosts the annual Sundance Film Festival, which has been held every January since 1985, and currently attracts upwards of 30,000 Utah nonresident attendees. In 2015, the film festival's estimated 30,892 nonresident attendees spent a total of \$57.2 million in Utah (an average of \$310 per person per day), the majority of which (84 percent) was spent on lodging, meals, and retail shopping.¹⁷ The economic impact study of the 2015 Sundance Film Festival showed that even though there were more total attendees in 2015 than in 2014, the 2015 festival drew a slightly younger and more local crowd than the previous year, with a greater number of attendees who reportedly stayed with friends and family rather than in commercial lodging. As Figure 8 shows, leisure and hospitality jobs spike in Summit County during peak skiing and snowboarding season in the first quarter (January through March). Spring and summer leisure and hospitality employment in Summit County has been increasing at a faster rate than winter employment as Park City continues to develop its off-season travel markets. Summit County's winter employment has grown five percent over the past five years while its off-season summer employment has grown 16 percent.

In contrast to winter tourism seasonality, Grand County, located in Canyon Country, experiences warm weather seasonality. Grand County is home to Arches and Canyonlands National Parks, whitewater rafting, mountain biking, rock climbing, athletic events, art and music festivals, jeep safari, and many other

Figure 9
Grand County: Average Leisure & Hospitality Jobs by Quarter



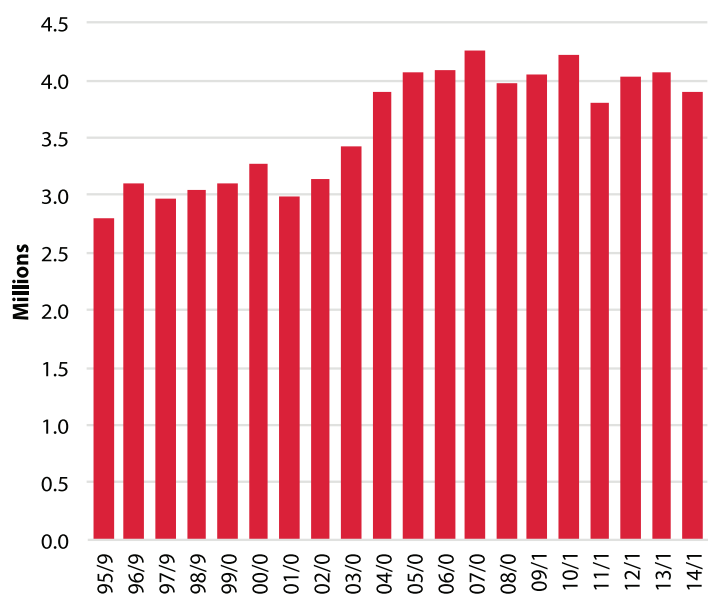
Source: Utah Department of Workforce Services

local seasonal attractions that run from late March through early November. Figure 9 illustrates how leisure and hospitality jobs in Grand County peak in quarters two and three, or April through September, with a significant drop in the number of jobs during quarters four and one, or October through March. Similar to Summit County, Grand County's off-season (fall and winter) leisure and hospitality employment sector has been growing at a faster average annual rate than spring and summer employment. Over the past five years, its winter employment has grown 23 percent while spring and summer employment (combined) has grown 20 percent. Possible explanations for Grand County's relative growth in off-season leisure and hospitality employment include increasing numbers of resident travelers visiting Grand County during the off-season to avoid seasonal crowds, and take advantage of milder winter temperatures.

Skiing and Snowboarding in Utah

Winter sports are a major aspect of Utah's travel and tourism industry. Utah's 14 world-class ski resorts attract nonresident visitors and new dollars to the economy on an annual basis. Recent developments in Utah's ski industry include the construction and grand opening of Cherry Peak Ski Resort, which is located two hours north of Salt Lake City in Cache County. In Summit County, Park City Mountain Resort and Canyons ski resort merged in 2015 and rebranded as one ski resort: Park City. Park City, owned by Vail Resorts, is now America's largest ski resort.¹⁸ In addition, Snowbird recently announced increased snowmaking capabilities and the completion of its glass-and-stone Summit Lodge that has replaced its old ski patrol/warming hut at 11,000 feet above sea level. Finally, Solitude Ski

Figure 10
Utah Total Skier Days



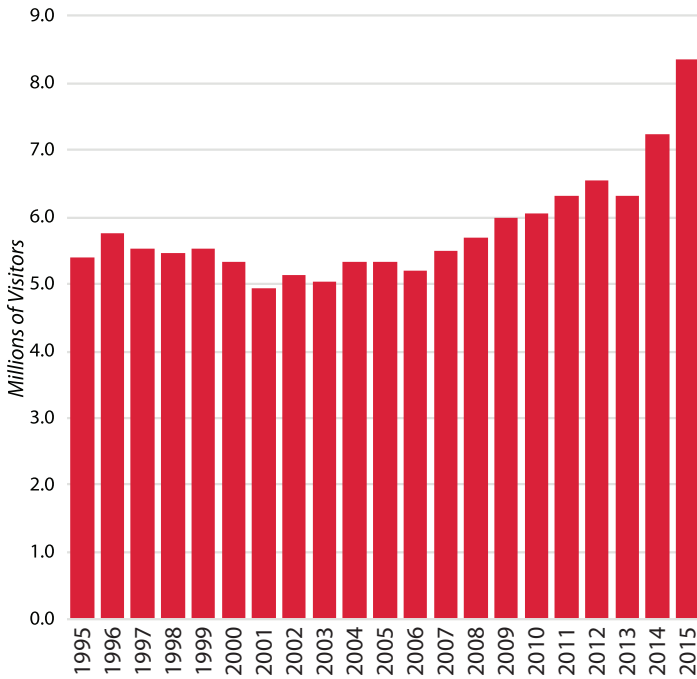
Source: Ski Utah

Resort, recently acquired by Deer Valley Resort, completed construction of a new high speed quad in addition to completing general resort renovations.

Utah's ski industry, which supports an estimated 18,000 jobs statewide, experienced a less-than-ideal, but not-as-bad-as-expected, 2014/15 season due to sub-average snowfall. Despite the fact that Utah resorts reported only 41 percent of average snowfall and skier days were down five percent from the previous season, Ski Utah's reported 3,946,762 skier days made the 2014/2015 season the ninth busiest season in the history of the Utah ski industry (see Figure 10). Although this number was the second-lowest number of skier days during the last decade, it was still the ninth busiest season in the history of the Utah ski industry. The relative success of the 2014/15 winter can be attributed to improved snowmaking capabilities at Utah's resorts, the fact that most of the snowfall came early in the season and stuck around into the spring, and an influx of destination visitors eager to escape the extremely dry west coast winter or the heavily saturated and cold east coast winter.

During the less-than-ideal 2014/15 ski season, research firm RRC Associates (RRC) conducted their biannual on-mountain skier survey with results that reflected the poor snow year. RRC estimated total skier/snowboarder spending to be \$1.170 billion during the 2014/15 season, down nine percent from 2012/13, but very close to 2010/11 spending (\$1.173 billion). Of this, \$895 million was spent by nonresident skiers and snowboarders (down from \$1.076 billion in 2012/13), with an average daily per person spend of \$315 (down from \$323 in 2012/13). RRC's next on-mountain survey of Utah resorts will take place during the 2016/17 ski season.

Figure 11
Utah National Parks Recreation Visitation



Source: U.S. National Park Service

Park Visitation in Utah

Utah has a unique topography consisting of Rocky Mountain, Colorado Plateau, and basin and range geography. A large percent of Utah’s dramatic landscape and relics of its Native American and pioneer heritage are organized into federal and state parks that aim to preserve and educate visitors about Utah’s natural, cultural, and historical assets. Utah has five national

parks, seven national monuments, two national recreation areas, one national historic site, 43 state parks, 23 million acres of BLM land, 26 scenic byways, five welcome centers, and over 8 million acres of national forest, all of which offer a variety of opportunities to travelers.¹⁹

National Parks and Places

In June of 2015, the National Park Service (NPS) issued its annual “Visitor Spending Effects” report detailing non-local visitation to Utah parks and places in federal fiscal year 2014 and resultant spending, supported jobs, and economic output. According to the NPS analysis, over 10 million recreation visits generated over \$745 million in spending and supported 11,000 jobs with an economic output of \$1.1 billion²⁰; the majority of which supported the economies of Utah’s rural gateway communities.²¹

National Parks

According to the most recent NPS visitation numbers, 2015 was another record year for Utah national parks, with 8.4 million recreation visits (up 16 percent from 2014) (see Table 3). Visitation to Utah’s national parks has been on a steady uphill climb for the past 10 years, but has made significant year-over leaps in 2014 and 2015 (see Figure 11). While all Utah national parks experienced increased visitation post-recession (2010 to 2014), Arches has experienced the greatest increase (27 percent), followed by Canyonlands (24 percent) and Zion (20 percent). Table 4 shows 2014 and 2015 Utah national park recreation visitation, including year-over percent change. In 2015, Zion National Park reported the largest share of visitors at 44 percent (see Figure 12).

Table 3
The Economic Contributions of Utah’s National Parks and Places, 2014

| Park Unit | Non-Local Visits | Non-Local Spending (000’s) | Jobs From Non-Local Spending | Income From Non-Local Spending (\$000s) |
|--------------------------------------|------------------|----------------------------|------------------------------|---|
| Arches National Park | 1,284,768 | \$146,081 | 2,455 | \$61,114 |
| Bryce Canyon National Park | 1,357,065 | \$116,004 | 1,785 | \$45,778 |
| Canyonlands National Park | 512,595 | \$30,905 | 474 | \$11,733 |
| Capitol Reef National Park | 770,305 | \$54,208 | 774 | \$20,166 |
| Zion National Park | 2,966,739 | \$168,665 | 2,379 | \$87,681 |
| Cedar Breaks National Monument | 714,398 | \$46,436 | 694 | \$17,255 |
| Dinosaur National Monument | 237,172 | \$14,128 | 194 | \$5,685 |
| Golden Spike National Historic Site | 40,288 | \$2,371 | 39 | \$1,169 |
| Glen Canyon National Recreation Area | 2,368,452 | \$151,751 | 2,166 | \$56,617 |
| Hovenweep National Monument | 25,174 | \$1,600 | 23 | \$616 |
| Rainbow Bridge National Monument | 52,845 | \$3,372 | 49 | \$1,256 |
| Natural Bridges National Monument | 81,887 | \$5,163 | 72 | \$1,909 |
| Timpanogos Cave National Monument | 80,371 | \$5,128 | 89 | \$2,733 |
| Totals | 10,492,059 | \$745,812 | 11,193 | \$313,712 |

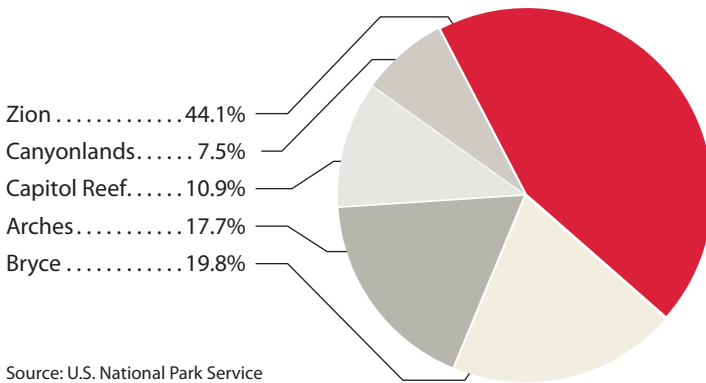
Source: U.S. National Park Service

Table 4
Utah National Park Recreation Visitation by Park

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

Source: U.S. National Park Service

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



Source: U.S. National Park Service

On a national scale, Zion National Park annually ranks in the “10 Most-Visited National Parks” and was the seventh most visited national park in 2014.²² Zion ranked 27th out of all 367 national places for visitation, eighth of 43 for concessioner lodging, seventh of 93 for tent campers, and sixth of 84 for RV campers. However, in 2014 Canyonlands surpassed Zion in number of backcountry campers, ranking sixth out of 96 national parks and places.

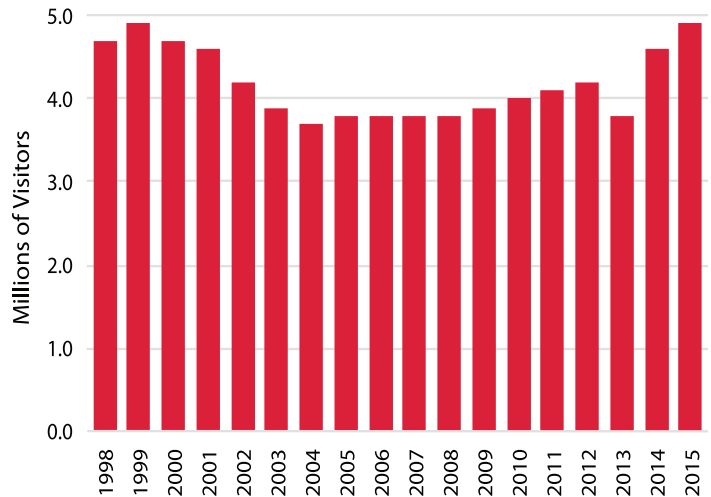
National Places

In 2015, there was a six percent year-over increase in total national place visitation and a 18 percent increase in visitation from 2011 to 2015 (see Figure 13). Golden Spike National Historic Site reported the greatest year-over increase in visitation (34 percent), followed by Hovenweep National Monument (31 percent), and Rainbow Bridge National Monument (23 percent) (see Table 5). According to the National Park Service, 2015 visitation to all national places grew at least four percent from the previous year.²³

State Parks

Utah’s Division of State Parks manages 43 state parks and administers the Utah off-highway-vehicle, boating, and trails program. Although records of state park visitation have been

Figure 13
Utah National Place Recreation Visitation



Source: U.S. National Park Service

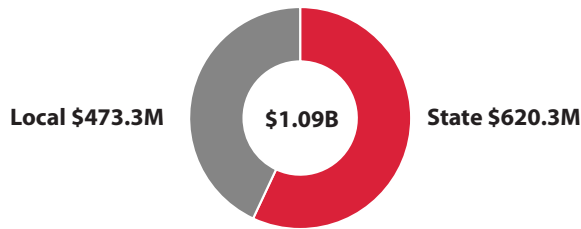
Table 5
Utah National Place Visitation by Place

| Utah National Places | 2014 | 2015 | 2014-2015 |
|---|------------------|------------------|-------------|
| Grand Staircase-Escalante NM | 878,945 | 912,055 | 3.8% |
| Cedar Breaks NM | 762,907 | 793,601 | 4.0% |
| Dinosaur NM | 250,625 | 291,799 | 16.4% |
| Glen Canyon NRA | 2,368,452 | 2,495,093 | 5.3% |
| Golden Spike NHS | 44,125 | 59,151 | 34.1% |
| Hovenweep NM | 26,809 | 35,117 | 31.0% |
| Natural Bridges NM | 87,119 | 94,797 | 8.8% |
| Rainbow Bridge NM | 62,910 | 77,270 | 22.8% |
| Timpanogos NM | 95,680 | 104,025 | 8.7% |
| Total NM, NRA, and NHS Area Visits | 4,577,572 | 4,862,908 | 6.2% |

Source: U.S. National Park Service

kept as far back as 1980, several state parks have been decommissioned, or created, since then. Appendix A of this report shows state park visitation for 37 of Utah’s 43 state parks for fiscal years 2014 and 2015. According to state park data, Antelope Island, Dead Horse Point, Jordanelle, and Sand Hollow state parks recorded the most visitation at well over 300,000 visitors per year. Goblin Valley, Hyrum, Jordanelle, Kodachrome Basin, Territorial Statehouse Museum, and Willard Bay state parks all experienced at least 25 percent year-over increases in visitation. On the other hand, Gunlock, Frontier Homestead, and Millsite reported greater than 25 percent year-over decreases in visitation. Overall, there was an 18 percent year-over increase in total Utah state park visitation.²⁴

Figure 14
Total Estimated Tourism-Generated Tax Revenue, 2014
(Millions of 2014 Dollars)



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

Meetings, Conventions, and Trade Shows

Throughout the year, Utah hosts numerous meetings, conventions, and trade shows, which attract nonresident visitors to Utah and new dollars to its economy. Between 2005 and 2014, the Bureau of Economic and Business Research (now the Kem C. Gardner Policy Institute) surveyed 43 Salt Lake County conventions – only a fraction of total meetings held in Utah during this time frame. From those surveys, BEBR estimated that 312,830 nonresident meeting attendees spent about \$954 per person per visit/stay.²⁵ Visit Salt Lake, the Convention & Visitors Bureau, noted that Salt Lake County hotel revenues were more than an estimated \$455 million in 2015. This not only represented a 13 percent year-over increase, but was also in excess of hotel revenues generated during the record year of the 2002 Winter Olympic Games. In fact, this marks a 44 percent increase in Salt Lake County hotel revenues over the last five years making 2015 the second record year in a row for convention attendance in Salt Lake County.

It is important to note that convention attendance creates compression in downtown Salt Lake City, driving hotel room rates up and promoting the distribution of visitors to areas outside of Salt Lake’s downtown core. During their stay, convention attendees spent money on dining, shopping, and participating

in local cultural attractions around the city. In 2015, an estimated 341,000 convention attendees spent an estimated \$325 million in the local economy, generating jobs as well as state and local tax revenue.²⁶

Tourism-Related Sales and Sales Tax Revenue

In 2014, the record \$7.98 billion in Utah visitor spending generated an estimated \$1.09 billion in state and local tax revenue (see Figure 14).²⁷ In Utah, a large portion of total tourism-related tax revenue comes from sales taxes collected on visitor purchases. Each taxable sale in Utah generates a combination of state and local tax revenue. Utah’s sales and use taxes are transaction taxes, meaning “the transaction is taxed, not the actual goods or services. The buyer is the actual taxpayer.”²⁸ Although not all traveler purchases are taxable transactions, or taxable sales (e.g. transportation fares), the majority of travel and tourism-related purchases are.

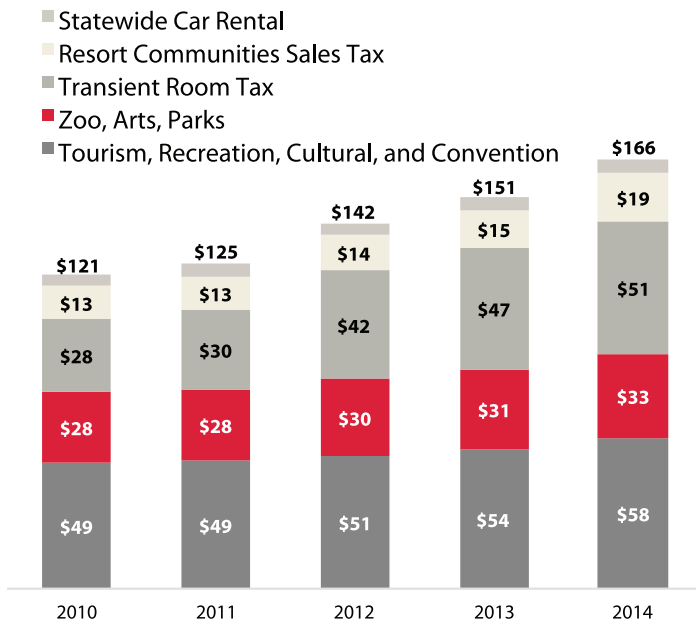
Table 6 shows total leisure and hospitality taxable sales from 2010 to 2014, as reported by the Utah State Tax Commission. When adjusted for inflation, leisure and hospitality sales, as a group, increased 23 percent over the past five years and seven percent over the past year, with the largest year-over increases in museums, historical sites, zoos, parks, and similar (29 percent), amusement and recreation (19 percent), and special food services (11 percent). The only leisure and hospitality subsector that experienced a year-over decrease in sales was performing arts and spectator sports (down five percent). Otherwise, all other leisure and hospitality subsectors experienced at least five percent year-over taxable sales increases in 2014. When adjusted for inflation, total tourism-related tax revenues have increased 37 percent from 2010 to 2014 and 10 percent from 2013 to 2014 (see Figure 15).²⁹ Resort communities sales tax revenue experienced the largest year-over increase (30 percent), followed by statewide motor vehicle rental tax (13 percent), and transient room tax revenue (nine percent).

Table 6
Leisure & Hospitality Industry Taxable Sales *(Millions of 2014 Dollars)*

| Industry | 2010 | 2011 | 2012 | 2013 | 2014 | % Change 2010-2014 | % Change 2013-2014 |
|---|------------------|------------------|------------------|------------------|------------------|--------------------|--------------------|
| Performing Arts, Spectator Sports, Related | \$120.8 | \$85.1 | \$103.3 | \$115.4 | \$109.8 | -9.1% | -4.8% |
| Museums, Historical Sites, Zoos, Parks, Similar | \$32.7 | \$29.4 | \$34.1 | \$28.1 | \$36.4 | 11.2% | 29.2% |
| Amusement & Recreation | \$354.9 | \$354.1 | \$373.5 | \$398.5 | \$473.9 | 33.5% | 18.9% |
| Hotels, Motels, B&Bs, Resorts, Other | \$1,059.3 | \$1,176.6 | \$1,245.1 | \$1,305.8 | \$1,369.0 | 29.2% | 4.8% |
| RV Parks, Camps | \$25.9 | \$28.6 | \$30.0 | \$30.9 | \$32.8 | 26.9% | 6.1% |
| Restaurants & Other Eating Places | \$2,944.9 | \$3,049.1 | \$3,196.0 | \$3,339.1 | \$3,539.2 | 20.2% | 6.0% |
| Special Food Services, Food Carts | \$263.0 | \$281.4 | \$298.2 | \$324.8 | \$360.1 | 36.9% | 10.9% |
| Drinking Places (Alcoholic Beverages) | \$88.9 | \$96.7 | \$103.3 | \$103.0 | \$109.7 | 23.4% | 6.5% |
| Total | \$4,890.3 | \$5,101.0 | \$5,383.6 | \$5,645.5 | \$6,031.0 | 23.3% | 6.8% |

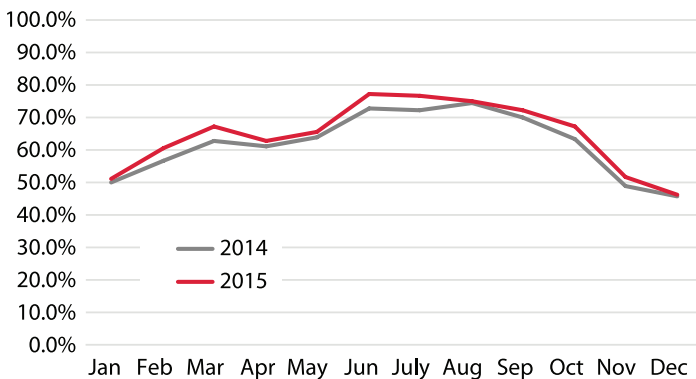
Source: Kem C. Gardner Policy Institute analysis of Utah State Tax Commission data

Figure 15
Total Tourism-Related Tax Revenue (Millions of 2014 Dollars)



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

Figure 16
Average Statewide Occupancy Rates by Month



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

Travel and Tourism-Related Industry Performance

Travel and tourism-related industry performance is another important aspect when examining the state of Utah's travel and tourism industry. The U.S. Bureau of Economic Analysis (BEA) provides public statewide data, including employment and earnings data.³⁰ To understand recent travel and tourism industry performance, the Policy Institute analyzed Utah's accommodations, transportation, arts, entertainment, recreation, and foodservice industry data. Because the share of total statewide visitor retail spending is relatively small, the performance of the retail sector has not been included.

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

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

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

Accommodations Industry Performance

Taxable accommodation sales indicate trends in spending by travelers and tourists across the state. In 2014, \$1.4 billion was spent on accommodations in the state of Utah, a 29 percent increase from 2010. Accommodations include hotels, motels, bed and breakfasts, campgrounds, and similar businesses. Based on hotel and lodging data provided by Smith Travel Research, Utah's average occupancy rates experienced year-over increases in all 12 months of 2015, with the greatest year-over increases reported in March, June, and July (see Figure 16). Utah hotels' average daily rates surpassed 2014 figures as well (see Table 7). In 2014, there was a three percent year-over increase in accommodation industry employment and a six percent year-over increase in earnings. Taxable sales in the accommodations industry, adjusted for inflation, increased 29 percent from 2010 to 2014 and five percent from 2013 to 2014. In 2014, the accommodations industry provided 20,992 full- and part-time employee and proprietor jobs and \$641 million in earnings.

Transportation Industry Performance

The performance of Utah's transportation industry, which includes passenger air and rail, transit and ground, and travel arrangements and reservation services, has fluctuated over time, but has generally made strides in both employment and earnings since the recession.

Passenger Air Industry

Utah has one international airport located in Salt Lake City, as well three additional primary commercial airports.³¹ Salt Lake City International Airport (SLC) offers direct flights to multiple domestic destinations and to a handful of international destinations.³² The Salt Lake City International Airport records passenger numbers on a monthly and annual basis. Passenger data show that SLC usually receives the largest volume of passengers during the months of March, June, July, and August. Of total deplaned passengers, approximately three percent are international travelers.³³ Table 8 shows the annual percent change of total deplaned passengers, employment, and wages for scheduled air transportation from 2010 to 2014. Employment and

Table 8
Utah's Passenger Air Industry

| Year | Total Deplanned Passengers | % Annual Change | Employment* | % Annual Change | Wages (\$Millions) | % Annual Change |
|------|----------------------------|-----------------|-------------|-----------------|--------------------|-----------------|
| 2010 | 10,463,367 | 2.3% | 6,370 | 4.0% | \$361.2 | 7.9% |
| 2011 | 10,196,611 | -2.5% | 6,553 | 2.9% | \$389.0 | 2.9% |
| 2012 | 10,064,456 | -1.3% | 6,222 | -5.1% | \$374.7 | -5.1% |
| 2013 | 10,083,831 | 0.2% | 5,960 | -4.2% | \$393.3 | 5.0% |
| 2014 | 10,569,675 | 4.8% | 6,141 | 3.0% | \$391.4 | -0.5% |

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

wages in Utah's scheduled air industry have fluctuated over the past five years, showing a three percent year-over increase in employment, flat wages, and a five percent increase in passengers.³⁴ As of 2014, Utah's airline industry provided an average of 6,141 direct full- and part-time jobs (does not include proprietors) and \$391 million in wages.

Passenger Rail Industry

Amtrak passenger rail serves Utah with one long-distance train, the California Zephyr, which crosses from Chicago to San Francisco daily. Utah currently has four Amtrak stations: Green River, Helper, Provo, and Salt Lake City. Although Amtrak provided a couple more Utah jobs in federal fiscal year 2015, ridership, industry spending, and direct wages were down from the previous year.³⁵ In federal fiscal year 2015, Amtrak ridership was reported to be 46,081, an 11 percent year-over decrease from fiscal year 2014 as well as the lowest ridership since fiscal year 2009. Amtrak also reportedly spent a little over \$3 million on goods and services in Utah, most of which was spent in Salt Lake County. In fiscal year 2015, Amtrak provided 48 direct Utah jobs and \$4.1 million in wages.

Transit and Ground Passenger Transportation

Utah's transit and ground passenger transportation sector includes mixed-mode transit, commuter rail, bus transportation, special needs transportation, airport shuttle, and other transit and ground passenger transportation. According to BEA data, employment in this sector has increased 23 percent in the past five years and five percent in the past year. Earnings increased 24 percent over the past five years and remained flat from 2013 to 2014. In 2014, Utah's transit and ground passenger transportation industry supplied 2,545 direct full- and part-time employee and proprietor jobs and \$91.0 million in earnings.

Charter Bus, Taxi, and Limousine

In 2014, the charter bus industry experienced a four percent year-over increase in employment and a two percent increase in wages, while taxi and limousine jobs and wages remained flat. These industries provided a combined total of 751 direct

Table 9
Utah's Arts, Entertainment, and Recreation Industry

| Key Measurement | 2013 | 2014 | % Change 2013-2014 |
|-------------------------------|---------|---------|--------------------|
| Private Employment | 37,853 | 38,760 | 2.4% |
| Private Earnings (\$Millions) | \$746.1 | \$761.2 | 2.0% |
| Public Employment | 6,133 | 6,612 | 7.8% |
| Public Wages (\$Millions) | \$100.3 | \$107.5 | 7.2% |
| Taxable Sales (\$Millions) | \$542.0 | \$620.1 | 14.4% |

Source: Kem C. Gardner Policy analysis of U.S. Bureau of Economic Analysis, Utah Department of Workforce Services and Utah State Tax Commission data

full- and part-time jobs (does not include proprietors) and \$18.1 million in combined wages.

Travel Arrangement and Reservation Services

The travel arrangement and reservation services sector remained stable in 2014, and although jobs remained flat, total wages experienced a five percent year-over increase. In 2014, this sector reported 5,346 direct full- and part-time jobs (does not include proprietors) with \$153.4 million in wages.

Arts, Entertainment, and Recreation Industry Performance

Although arts, entertainment, and recreation (AER) industry performance is not tied as closely to the travel and tourism industry as are the accommodations and transportation industry sectors, traveler purchases do support a portion of jobs in the AER sector.³⁶ Table 9 shows both private and public employment and earnings, and gross taxable sales data from 2013 to 2014.³⁷ This sector includes Utah's ski industry, nature parks, museums, zoos, historical sites, amusement parks, performing arts, and spectator sports. Utah's AER sector fared well from 2010 to 2014 compared to other leisure and hospitality sectors highlighted in this report. Public employment and wages, as well as taxable sales, experienced greater than seven percent increases from 2013 to 2014. The data show a significant increase in local government amusement and recreation jobs over the years, which tend to be part-time, seasonal, and lower-paying than, for example, federal and state parks jobs. In 2014, the AER industry

Table 10
Utah's Food Services and Drinking Places Industry

| Key Measurement | 2013 | 2014 | % Change 2013-2014 |
|----------------------------|---------|---------|-----------------------|
| Employment | 90,653 | 93,954 | 3.6% |
| Earnings (\$Millions) | \$1,780 | \$1,877 | 5.4% |
| Taxable Sales (\$Millions) | \$3,767 | \$4,009 | 6.4% |

Source: Kem C. Gardner Policy analysis of U.S. Bureau of Economic Analysis data and Utah State Tax Commission data

supported 45,372 public and private full- and part-time jobs (including private proprietors) and \$869 million in earnings.

Food Services and Drinking Places Industry Performance

The food services and drinking places (foodservice) subsector, which includes restaurants and bars, is also part of the leisure and hospitality sector. Although it is likely that the majority of restaurant and bar patrons are local residents, a portion of Utah restaurant and bar patrons are visitors from outside of the state.³⁸ Foodservice employment, earnings, and taxable sales, all took a small dip during the recession, but made a strong comeback from 2011 to 2014. Similar to AER, foodservice industry sales made incremental, annual gains over the past three years (see Table 10). In 2014, Utah's foodservice industry provided 93,954 direct full- and part-time employee and proprietor jobs and \$1.9 billion in employee and proprietor earnings.

Summary

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

Utah's economy experienced another year of record-setting traveler spending (\$7.98 billion) and associated state and local tax revenues (\$1.09 billion). Total tourism-related jobs increased 10 percent in the past five years and three percent in the past year. Tourism-related wages increased at an even greater rate, with a 12 percent increase since 2010 and a four percent year-over increase. On a regional and county basis, the share of total private jobs in the leisure and hospitality sector was largest in Utah's Canyon Country, Dixie, and Northern Mountains regions, and, more specifically, in Daggett, Garfield, Grand, Summit, and Wayne Counties. From 2010 to 2014, all Utah travel regions except for the Central region, experienced at least nine percent employment growth in the private leisure and hospitality sector.

While total national park recreation visits to Utah's five national parks set all-time records in 2014 (7.2 million visits) and 2015 (8.3 million visits), skier days to Utah's 14 ski resorts were down

five percent during the 2014/15 ski season. A drop in Utah's ski visitation was due in large part to a mild winter with below-average snowfall. Nevertheless, total national place and state park visitation grew, while convention, meeting, and trade show attendance (341,000 attendees) once again reached record levels. Increased leisure and business visitation led to increased visitor spending, which generated additional tax revenue and supported tourism-related jobs and wages across the state of Utah.

As for travel and tourism industry performance in 2014, the greatest year-over percent job growth occurred in the public AER sector (eight percent), followed by the transit and ground transportation (five percent), and foodservice (four percent) sectors. Foodservice added the most jobs from the previous year (3,301 jobs) with AER (907 jobs) and accommodations (696 jobs) in second and third. Year-over increases in earnings were greatest in the public AER sector (seven percent), followed by the accommodations (six percent), and foodservice (five percent) sectors. Taxable sales in the AER sector experienced the largest growth in the past year (14 percent), with a 29 percent annual increase in museums and historical site sales and a 19 percent increase in amusement and recreation sales. Every type of tourism-related sales tax revenue grew at least five percent from 2013 to 2014, which meant an additional \$17 million dollars in tourism-related sales tax revenue. The greatest year-over increases were in resort community sales tax revenue (30 percent), statewide motor vehicle rental tax revenue (13 percent), and transient room tax revenue (nine percent).

Looking ahead to 2016, there is reason for optimism about continued growth in Utah's travel and tourism industry. Following on the heels of their very successful "Mighty 5[®]" marketing campaign, the Utah Office of Tourism plans to release their "Road to Mighty™" marketing campaign in early 2016. The "Road to Mighty™" campaign will highlight Utah's lesser known parks and scenic landscapes. Meanwhile, the U.S. Travel Association forecasts a three percent increase in domestic and international spending in the U.S. in 2016 along with a two percent increase in domestic person-trips and a three-to-five percent increase in international visitation. Based on a strengthening U.S. dollar, a downturn in visitation to Utah from overseas is a possibility in the coming year. Otherwise, U.S. gas prices are expected to remain low while the U.S. economy is expected to grow steadily, increasing opportunities for, and the likelihood of, increased domestic travel.

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

Appendix A: Utah State Park Visitation by Park

Utah State Park

| | FY14 | FY15 | % Change FY14-FY15 |
|--|------------------|------------------|-----------------------|
| Anasazi Indian Village State Park Museum | 20,022 | 19,827 | -1.0% |
| Antelope Island State Park | 312,933 | 380,611 | 21.6% |
| Bear Lake State Park | 204,248 | 229,199 | 12.2% |
| Camp Floyd - Stage Coach Inn | 14,047 | 15,197 | 8.2% |
| Coral Pink Sand Dunes State Park | 69,553 | 79,579 | 14.4% |
| Dead Horse Point State Park | 333,488 | 383,478 | 15.0% |
| Deer Creek State Park | 187,186 | 228,630 | 22.1% |
| East Canyon State Park | 81,132 | 97,380 | 20.0% |
| Edge Of The Cedars State Park Museum | 8,839 | 10,724 | 21.3% |
| Escalante Petrified Forest State Park | 43,243 | 47,318 | 9.4% |
| Fremont Indian State Park | 12,606 | 14,808 | 17.5% |
| Frontier Homestead State Park Museum | 18,724 | 7,466 | -60.1% |
| Goblin Valley State Park | 109,593 | 140,292 | 28.0% |
| Green River State Park | 45,072 | 48,566 | 7.8% |
| Gunlock Reservoir | 17,056 | 9,943 | -41.7% |
| Huntington State Park | 30,504 | 25,191 | -17.4% |
| Hyrum State Park | 48,288 | 67,846 | 40.5% |
| Jordanelle State Park | 240,327 | 357,869 | 48.9% |
| Kodachrome Basin State Park | 72,093 | 91,157 | 26.4% |
| Millsite State Park | 19,132 | 13,075 | -31.7% |
| Otter Creek State Park | 24,194 | 27,240 | 12.6% |
| Palisade State Park | 93,228 | 103,979 | 11.5% |
| Piute Reservoir | 2,691 | 2,103 | -21.9% |
| Quail Creek State Park | 63,467 | 75,113 | 18.3% |
| Red Fleet State Park | 26,125 | 24,319 | -6.9% |
| Rockport State Park | 103,146 | 105,757 | 2.5% |
| Sand Hollow State Park | 303,312 | 351,339 | 15.8% |
| Scofield State Park | 22,045 | 25,316 | 14.8% |
| Snow Canyon State Park | 217,335 | 254,730 | 17.2% |
| Starvation State Park | 75,815 | 87,196 | 15.0% |
| Steinaker State Park | 26,416 | 30,923 | 17.1% |
| Territorial Statehouse State Park Museum | 4,456 | 7,308 | 64.0% |
| Utah Field House Of Natural History | 46,200 | 50,923 | 10.2% |
| Utah Lake State Park | 149,280 | 150,418 | 0.8% |
| Wasatch Mountain State Park | 235,727 | 259,390 | 10.0% |
| Willard Bay State Park | 160,695 | 259,022 | 61.2% |
| Yuba State Park | 87,628 | 97,022 | 10.7% |
| Total Visits | 3,529,846 | 4,180,254 | 18.4% |

Source: Utah State Parks

Appendix B: Endnotes

- 1: Examples of direct tourism jobs include hoteliers and tour guides; indirect tourism jobs include hotel towel wholesalers and recreational gear manufacturers; finally, induced employment includes jobs created when direct and indirect employees spend their paychecks in the local economy (e.g. grocery store clerks, bank tellers, pharmacists).
- 2: Davis, Salt Lake, Utah, and Weber counties.
- 3: Cache, Morgan, Rich, Summit, and Wasatch counties.
- 4: Carbon, Daggett, Duchesne, Emery, and Uintah counties.
- 5: Box Elder and Tooele counties.
- 6: Beaver, Juab, Millard, Piute, Sanpete, and Sevier counties.
- 7: Garfield, Grand, Kane, San Juan, and Wayne counties.
- 8: Iron and Washington counties.
- 9: Delta Airlines flight (seasonal) starting in May 2015.
- 10: Australia, Canada, and the U.K. are Utah's largest international ski markets.
- 11: Based on VisaVue® consumer spending records. Consumer credit cards are issued to individuals.
- 12: In 2014, commercial credit card expenditures were only one-tenth the amount of total consumer credit card expenditures in Utah. Commercial credit cards are issued to businesses or nonprofit agencies.
- 13: World Trade Association, 2015.
- 14: Weights are based on the U.S. Bureau of Economic Analysis's Travel and Tourism Satellite Accounts' "tourist commodity ratios."
- 15: About 65 percent of all tourism-related employment in the state of Utah falls under the "leisure and hospitality" umbrella.
- 16: Arches, Bryce Canyon, Canyonlands, and Capitol Reef National Parks are all in Canyon Country; Zion National Park is in Dixie.
- 17: Stambro, 2015.
- 18: Park City ski resort has 7,300 skiable acres and 300 trails.
- 19: The term "national places" includes federally designated and protected monuments, recreation areas, and historic sites.
- 20: This analysis does not include Flaming Gorge National Recreation Area (managed by the U.S. Forest Service) nor Grand Staircase-Escalante National Monument (managed by the BLM), which, if included, would account for even greater visitor spending, jobs, and economic output.
- 21: Gateway communities are defined in HR Bill 585, 109th Congress, as "those communities that abut or are in close proximity to Federal lands."
- 22: Utah's four other national parks all ranked within the top half of all 58 national parks.
- 23: Visitation data for Flaming Gorge National Recreation Area is unavailable and is not included in counts.
- 24: Flight Park, Goosenecks, Great Salt Lake, Historic Union Rail Trail, Jordan River OHV, and This is the Place state parks have been omitted from this analysis due either to discrepancies in methodology or missing data.
- 25: The concentration of meeting attendees at convention venues enables the survey of attendees to determine their spending with a high degree of confidence.
- 26: Visit Salt Lake, 2015.
- 27: Includes estimated direct, indirect, and induced tourism-related sales, property, corporate, income, and all other tourism-related tax revenue sources.
- 28: Utah State Tax Commission.
- 29: In this report, tourism-related tax revenues include tourism, recreation, culture and convention facilities (TRCC) tax, resort communities sales tax, transient room tax, zoo, arts parks (ZAP) sales tax, and statewide car rental tax.
- 30: Employment includes part-time and full-time employee wage and salary jobs and proprietors' jobs; earnings includes wage and salary disbursements, supplements to wages and salaries (employer contributions for employee pension and insurance funds and for government social insurance), and proprietors' income.
- 31: Provo (PVU), St. George (SGU) and Wendover (ENV).
- 32: Canada, Mexico, France, Netherlands [seasonal], and England beginning May 1, 2016.
- 33: It must be noted that domestic and international travelers also fly into Las Vegas on their way to explore southern Utah's national parks and monuments.
- 34: Includes full- and part-time employee jobs.
- 35: Federal fiscal year is October 1 through September 30.
- 36: In 2011, the U.S. Bureau of Economic Analysis's Travel and Tourism Satellite Account program estimated that, on a national scale, 23 to 34 percent of purchases in the AER sector were attributed to travelers and tourists.
- 37: Public employment and wage data is included in this table to capture public park and museum jobs.
- 38: In 2011, the U.S. Bureau of Economic Analysis's Travel and Tourism Satellite Account program estimated that, on a national scale, 18 percent of purchases in the foodservice sector were attributed to travelers and tourists.

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