Department of Alcoholic Beverage Control

ZP
FI

2020 Master Plan

Zions Public Finance, Inc.
June 2020

Contents

Executive Summary

Background

Zions Public Finance, Inc. (ZPFI) was retained in 2020 to conduct an objective, third-party evaluation of the need for additional liquor stores in the State of Utah, locations of any such stores, a to provide a general analysis of possible store inefficiencies. ZPFI conducted a similar evaluation in 2016 and subsequently updated that evaluation in 2018.

Growth in Demand

Growth in demand for new liquor stores will come from several factors: 1) rapid population growth in Utah including in-migration; 2) increased per capita consumption; and 3) the tourism and convention industry. Utah law currently allows a maximum of one liquor store for 48,000 persons. Given the State's current estimated population, the maximum allowable number of stores is 69. There are currently 47 stores with legally allowable capacity for an additional 22 stores.

Table 1: Utah Population Growth and Allowable Liquor Stores

	2020	**2030**	**2040**
Total State Population	3,325,425	3,889,310	4,463,950
Population per Store	48,000	48,000	48,000
Total Allowable Stores	69	81	92
Current Stores	47	47	47
Additional Allowable Stores	**22**	**34**	**45**

Source: Gardner Policy Institute

As the table highlights, state law allows for an additional 22 stores than presently exist. By 2040, if population growth proceeds as anticipated, a total of 45 more stores will be allowable statewide, and 92 overall stores. This presents an opportunity, and a challenge, to properly plan for growth.

Market Area Analysis

To better understand growth trends for each of the outlets, a sophisticated GIS analysis was conducted to determine the market area for each outlet. This calculated the nearest outlet based on driving time for the entire state. A wide variety of different factors were then used to determine which market areas should have priority for additional liquor stores. Of the more than 20 factors initially considered in the analysis, the factors deemed most important included:

- 2020 population
- 2030 population
- Absolute population growth 2020-2030
- Population density 2020
- Bottles per man hour
- Transactions per capita

Based on these factors (which were given different weights in the analysis and which are described in detail in the body of this report), the following market areas were prioritized for new liquor stores:

Table 2: Priority for New Store Locations – Market Areas

Priority	Store	Market Area
1	16	Sandy
2	44	Pleasant Grove
3	31	Draper
4	40	Riverton
5	21	Harrisville
6	39	St. George
7	8	Bountiful
8	30	Layton
9	15	Cottonwood Heights
10	3	West Valley City
11	6	Logan
12	24	Ogden

There have been some changes in the priorities given to market areas in the 2018 Master Plan update. Changes in store performance, current population numbers, changing population growth projections, and the construction of new liquor stores are all factors which have contributed to these changes. A comparison of the 2020, 2018, and 2016 priorities can be seen in the table below.

Table 3: Comparison of 2020, 2018, and 2016 Priorities by Weighted Rank – Market Areas

Priority	2020 Weighted Rank		2018 Weighted Rank		2016 Weighted Rank	
	Store	Location	Store	Location	Store	Location
1	16	Sandy	16	Sandy	40	Riverton
2	44	Pleasant Grove	44	Pleasant Grove	30	Layton
3	31	Draper	40	Riverton	44	Pleasant Grove
4	40	Riverton	31	Draper	16	Sandy
5	21	Harrisville	21	Harrisville	26	Taylorsville
6	39	St. George	30	Layton	21	Harrisville
7	8	Bountiful	15	Cottonwood Heights	23	Roy
8	30	Layton	24	Ogden	3	West Valley City
9	15	Cottonwood Heights	3	West Valley City	8	Bountiful
10	3	West Valley City	29	Holladay	31	Draper
11	6	Logan	39	St. George	24	Ogden
12	24	Ogden	6	Logan	15	Cottonwood Heights

A sensitivity analysis that weights different factors is included in Appendix A.

Fiscal Impacts to Local Communities from Liquor Stores

Sales per square foot for liquor stores is considerably higher than the average sales per square foot in other types of retail stores. Average sales per square foot for all liquor stores in Utah combined are $1,170 per square foot. Higher sales per square foot results in increased sales tax revenues for a local community (on a per square foot basis) from liquor stores than from grocery stores, specialty stores, and most other types of retail stores. The average sales per square foot in liquor stores is similar to the national average for Costco ($1,050) – a highly sought-after retail chain. However, there is a wide range in average sales per square foot in Utah liquor stores – from a high of $2,302 per square foot to a low of $300 per square foot.

Downtown Considerations

An analysis of key performance metrics also showed that some stores may be in greater demand for relocation. This analysis used total transactions, transactions per capita, sales per square foot, and sales per capita to rank stores in terms of need for relocation or expansion. Stores with high transactions but small store space were found to be under increased burden. The following table shows the new store and relocation priorities in a side-by-side comparison.

Table 4: Comparison of New Store and Relocation Priorities

New Store Locations			Store Relocation or Expansion		
Priority	**Store**	**Market Area**	**Priority**	**Store**	**Market Area**
1	16	Sandy	1	2	Salt Lake City
2	44	Pleasant Grove	2	1	Salt Lake City
3	31	Draper	3	15	Cottonwood Heights
4	40	Riverton	4	38	Park City
5	21	Harrisville	5	9	Murray
6	39	St. George	6	37	Park City
7	8	Bountiful	7	29	Holladay
8	30	Layton	8	19	Ogden
9	15	Cottonwood Heights	9	25	Millcreek
10	3	West Valley City	10	16	Sandy
11	6	Logan	11	12	Salt Lake City
12	24	Ogden	12	31	Draper

Consumer Profile

Demographic trends for Utah show that household sizes are generally shrinking and that median ages are drifting closer to national averages. The change in growth patterns is worth noting in consideration for the location of future stores. Overall, current analysis indicates that areas with higher median ages, smaller household sizes, and greater household incomes tend to see more transactions and spending on alcohol purchases. Areas with strong employment centers also fare well, while tourism and hospitality-centric cities and towns also show strong activity.

Demographic Trends and Growth Patterns

The purpose of the tasks in this section is to evaluate growth in demand for retail outlets. The tasks focus on population growth, geographic location of future growth, and changing demographics and the resulting impacts to demand for retail outlets for alcoholic beverages.

Statewide Growth Trends

Population

The Gardner Policy Institute estimates the total population for the State of Utah to be 3.3 million and almost 3.9 million by 2030. The majority of growth is projected to occur in Utah and Salt Lake counties.

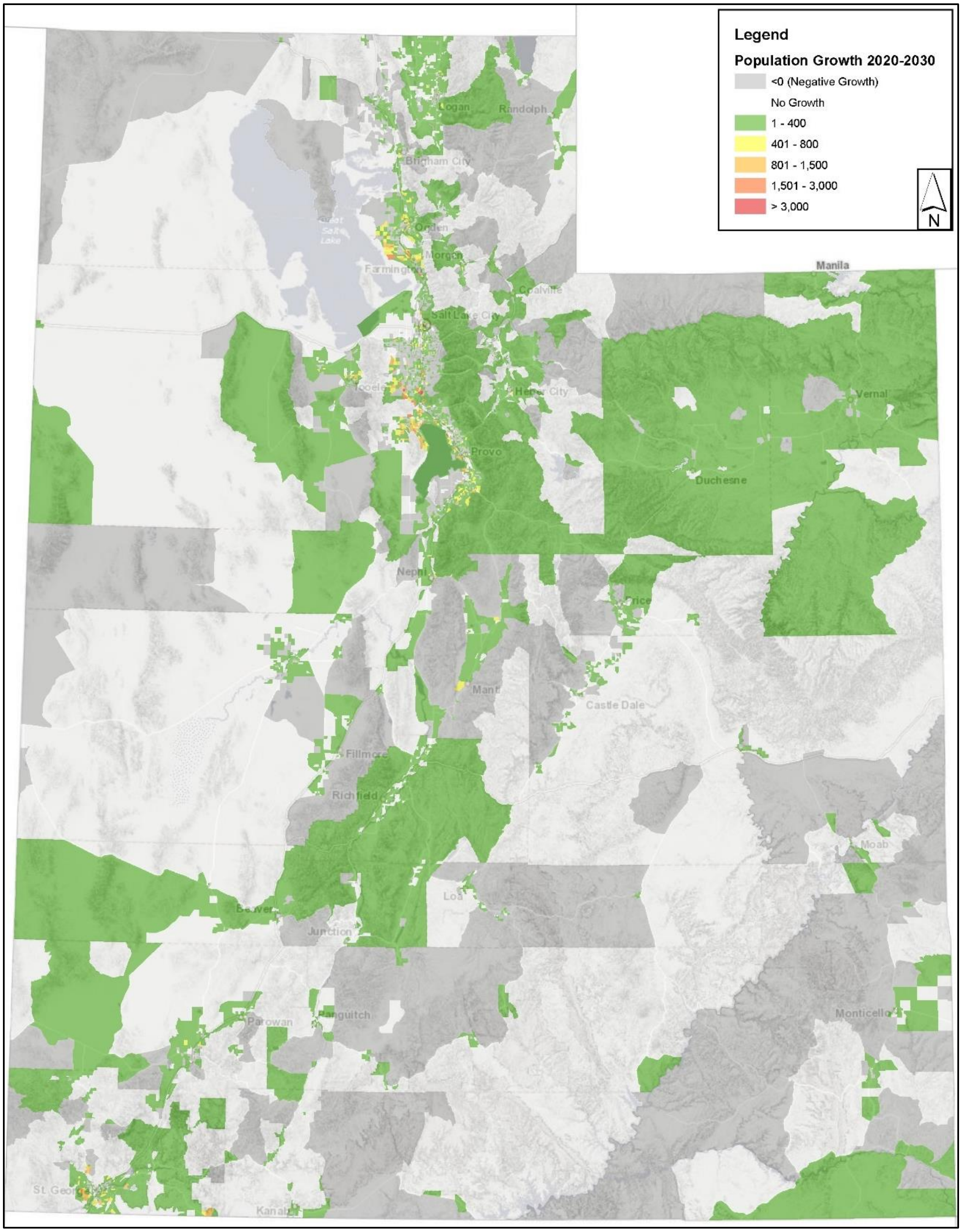
Table 5: Population Estimates by County

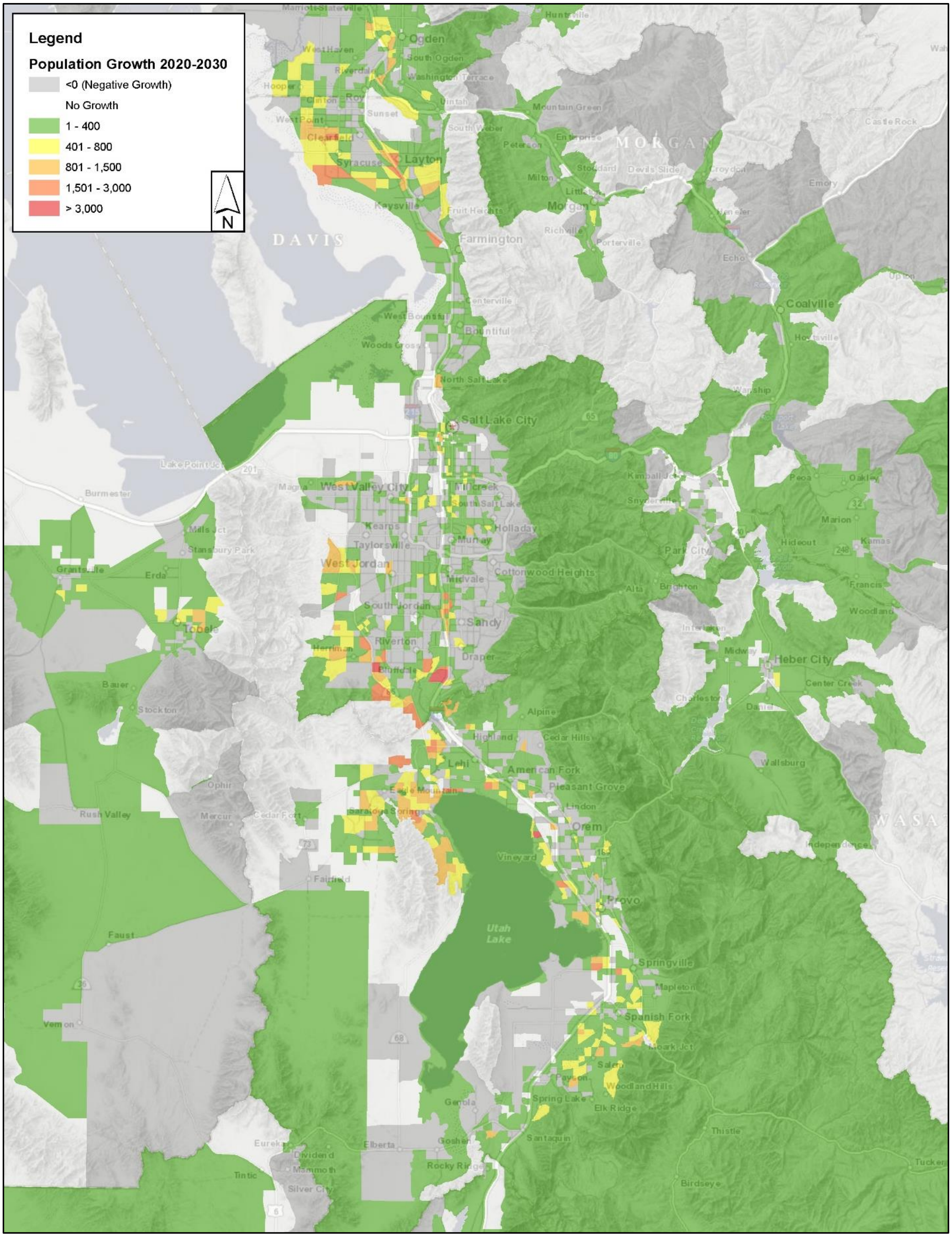
County	2020	2030	Growth 2020-2030
Utah County	679,188	861,852	218,783
Salt Lake County	1,181,471	1,306,414	160,568
Washington County	186,618	251,636	78,409
Davis County	364,813	406,046	51,917
Weber County	266,440	302,764	46,482
Cache County	133,601	158,815	30,130
Tooele County	74,293	93,258	23,396
Wasatch County	35,713	48,168	15,237
Iron County	55,056	63,898	11,016
Summit County	42,829	50,558	9,123
Box Elder County	57,479	64,263	8,493
Sanpete County	31,297	36,158	5,796
Uintah County	39,740	43,981	5,653
Juab County	13,498	17,911	5,370
Morgan County	13,443	17,612	5,121
Duchesne County	22,653	25,422	3,696
Carbon County	22,806	25,628	3,593
Sevier County	23,097	25,720	3,362
San Juan County	17,116	18,620	1,906
Millard County	13,774	15,010	1,503
Grand County	10,554	11,695	1,436
Kane County	8,165	9,152	1,266
Emery County	11,094	12,000	1,149
Garfield County	5,516	6,147	791
Beaver County	7,082	7,687	752
Wayne County	2,832	3,175	397
Rich County	2,452	2,638	229
Daggett County	1,164	1,304	168
Piute County	1,645	1,781	157
State of Utah Total	**3,325,425**	**3,889,310**	**695,895**

Source: Gardner Policy Institute

The following maps display the projected population growth throughout the State between 2020 and 2030 for individual Traffic Analysis Zones (TAZ).[1] Along the Wasatch Front, growth centers are found at the Southwest area of Salt Lake County and the West area of Utah County. With growth in the North area Davis County as well.

[1] Source: Wasatch Front Regional Council (WFRC)


Legend
Population Growth 2020-2030
<0 (Negative Growth)
No Growth
1 - 400
401 - 800
801 - 1,500
1,501 - 3,000
> 3,000
N
Logan
Randolph
Brigham City
Ogden
Morgan
Farmington
Manila
Coalville
Salt Lake City
Tooele
Heber City
Vernal
Provo
Duchesne
Nephi
Price
Manti
Castle Dale
Fillmore
Richfield
Moab
Loa
Beaver
Junction
Parowan
Panguitch
Monticello
St George
Kanab


Legend
Population Growth 2020-2030
<0 (Negative Growth)
No Growth
1 - 400
401 - 800
801 - 1,500
1,501 - 3,000
> 3,000
N
Ogden
Layton
Farmington
Bountiful
Salt Lake City
West Valley City
Murray
West Jordan
Sandy
Draper
Lehi
American Fork
Orem
Provo
Utah Lake
Springville
Spanish Fork
Heber City
Park City
Coalville
Tooele
DAVIS
MORGAN

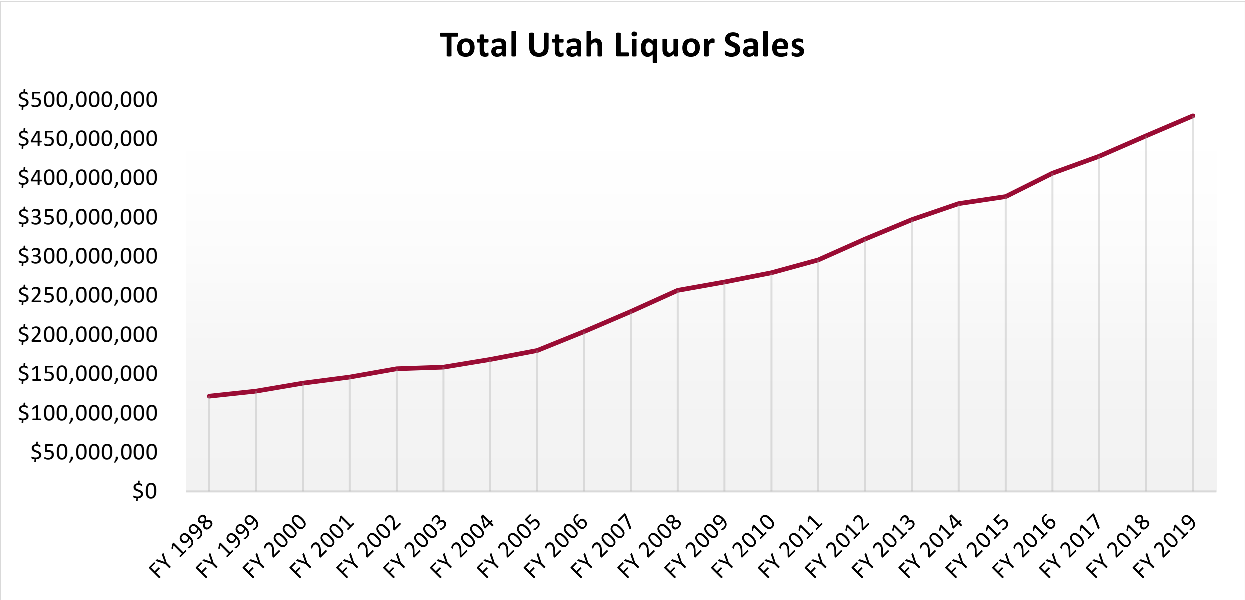
Utah law states that the State "may not establish a total number of state [liquor] stores that at any time exceeds the number determined by dividing the population of the state by 48,000."[2] Currently there are 47 state liquor stores. Based on an estimated 2020 population of 3,325,425,[3] the State could have up to 69 liquor stores statewide, as shown in the table below. Therefore, State law would permit up to 22 additional liquor stores throughout the State. Sections included later in this report will include analysis indicating potential locations for additional liquor stores.

Table 6: Allowable Liquor Stores

	2010	2020	2030	2040
Total State Population	2,763,885	3,325,425	3,889,310	4,463,950
Population per Store	48,000	48,000	48,000	48,000
Total Allowable Stores	57	69	81	92
Actual Stores	44	47	47	47
Additional Allowable Stores	**13**	**22**	**34**	**45**

Alcoholic Beverage Consumption

While not required by State law to determine the demand for additional liquor stores, alcoholic beverage consumption rates can help to illustrate the demand for additional outlets. Liquor sales in the State of Utah have grown by 6.8 percent annually from FY1998 to FY2019, while the State's population grew by only 2.1 percent annually during the same period.



Source: Utah Department of Alcohol Beverage Control – Annual Reports (64th thru 84th)

[2] Source: Utah Code 32B-2-501-2

[3] Source: Gardner Policy Institute

Table 7: Liquor Store Sales in Utah by Year

Year	Total Sales
FY1998	$121,580,981
FY1999	$127,952,863
FY2000	$138,115,263
FY2001	$145,773,330
FY2002	$156,629,891
FY2003	$158,405,762
FY2004	$168,269,264
FY2005	$179,756,680
FY2006	$203,731,658
FY2007	$229,583,398
FY2008	$256,645,955
FY2009	$267,123,335
FY2010	$279,216,064
FY2011	$295,549,247
FY2012	$321,970,708
FY2013	$346,794,300
FY2014	$367,205,136
FY2015	$376,239,000
FY2016	$405,959,435
FY2017	$427,606,013
FY2018	$453,689,000
FY2019	$479,324,000

Source: Utah Department of Alcohol Beverage Control – Annual Reports (64th thru 84th)

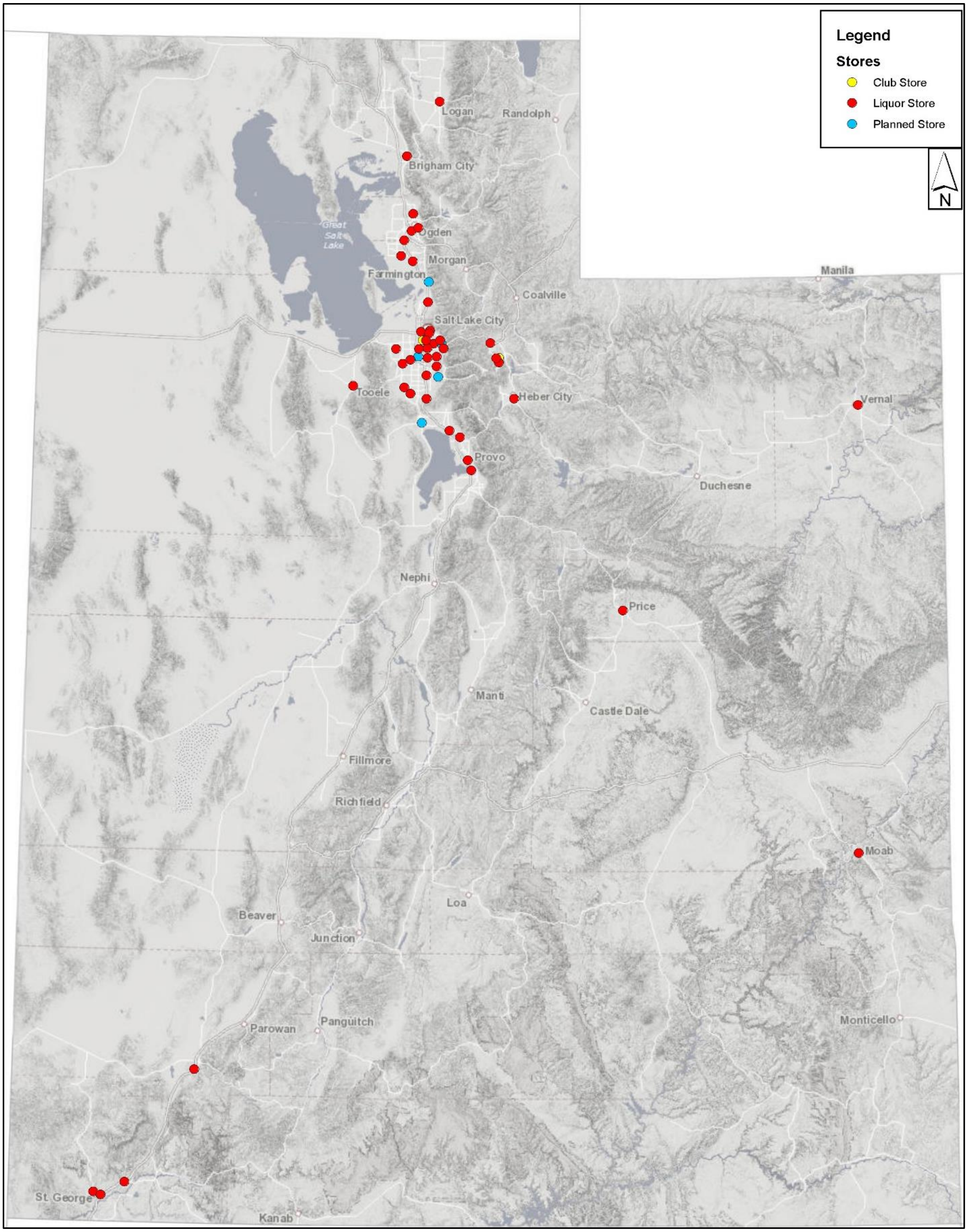
Market Area Analysis

The State of Utah currently has 47 liquor stores. Two stores are defined as club stores which serve primarily, but not exclusively, restaurants and other establishments licensed to sell alcoholic beverages. Salt Lake County has the most liquor stores, with 21, followed by Weber, Utah, and Summit Counties, each with four. Washington and Davis Counties have three. 32 of the 47 liquor stores are located along the Wasatch Front between Brigham City and Nephi. There are currently plans to add five more stores in the Wasatch Front area.

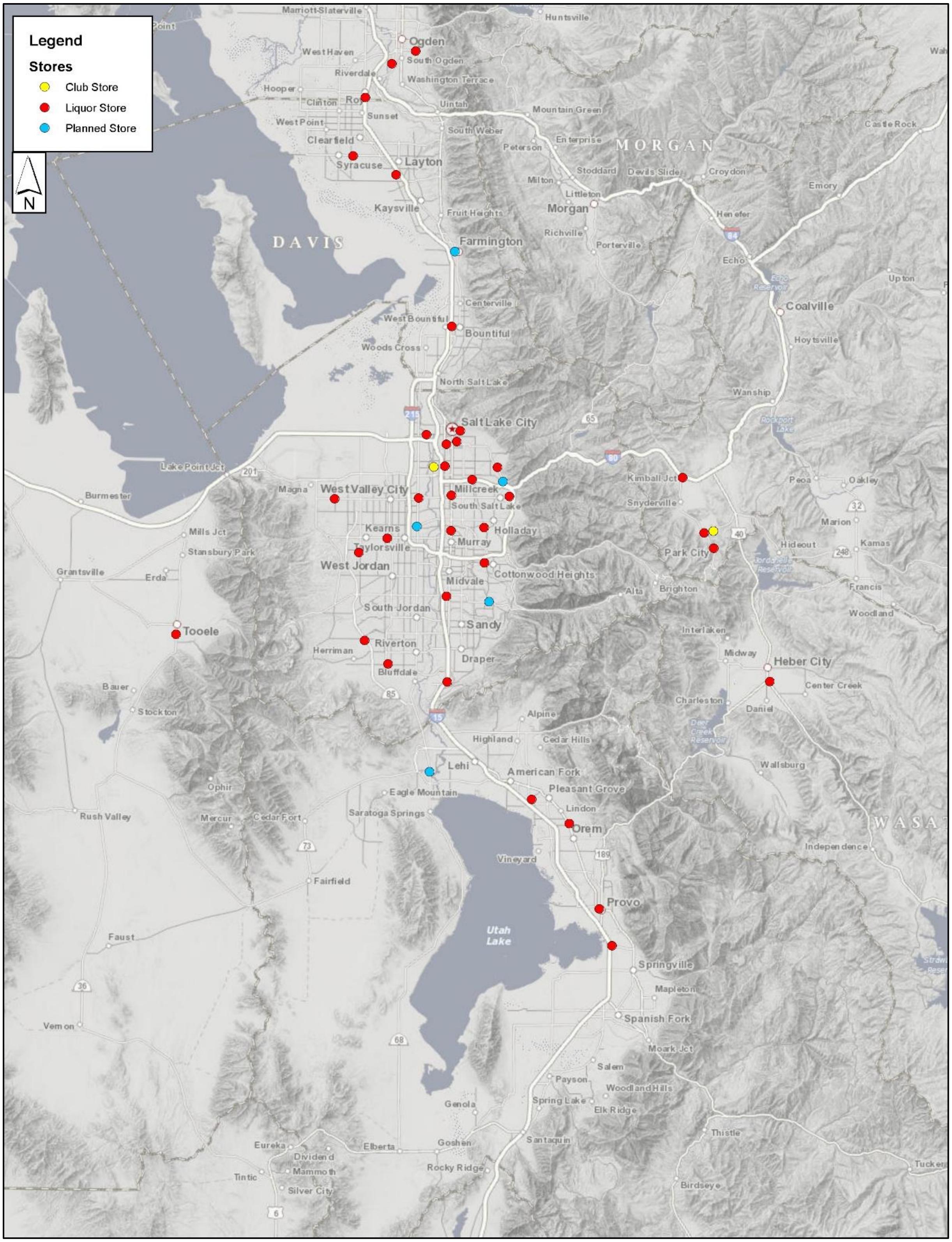
Table 8: Number of Liquor Stores by County

County	Liquor Stores	Club Stores	Grand Total
Box Elder County	1		1
Cache County	1		1
Carbon County	1		1
Davis County	3		3
Grand County	1		1
Iron County	1		1
Salt Lake County	20	1	21
Summit County	3	1	4

County	Liquor Stores	Club Stores	Grand Total
Tooele County	1		1
Uintah County	1		1
Utah County	4		4
Wasatch County	1		1
Washington County	3		3
Weber County	4		4
Grand Total	**45**	**2**	**47**



State Liquor Store Locations



State Liquor Store Locations – Wasatch Front

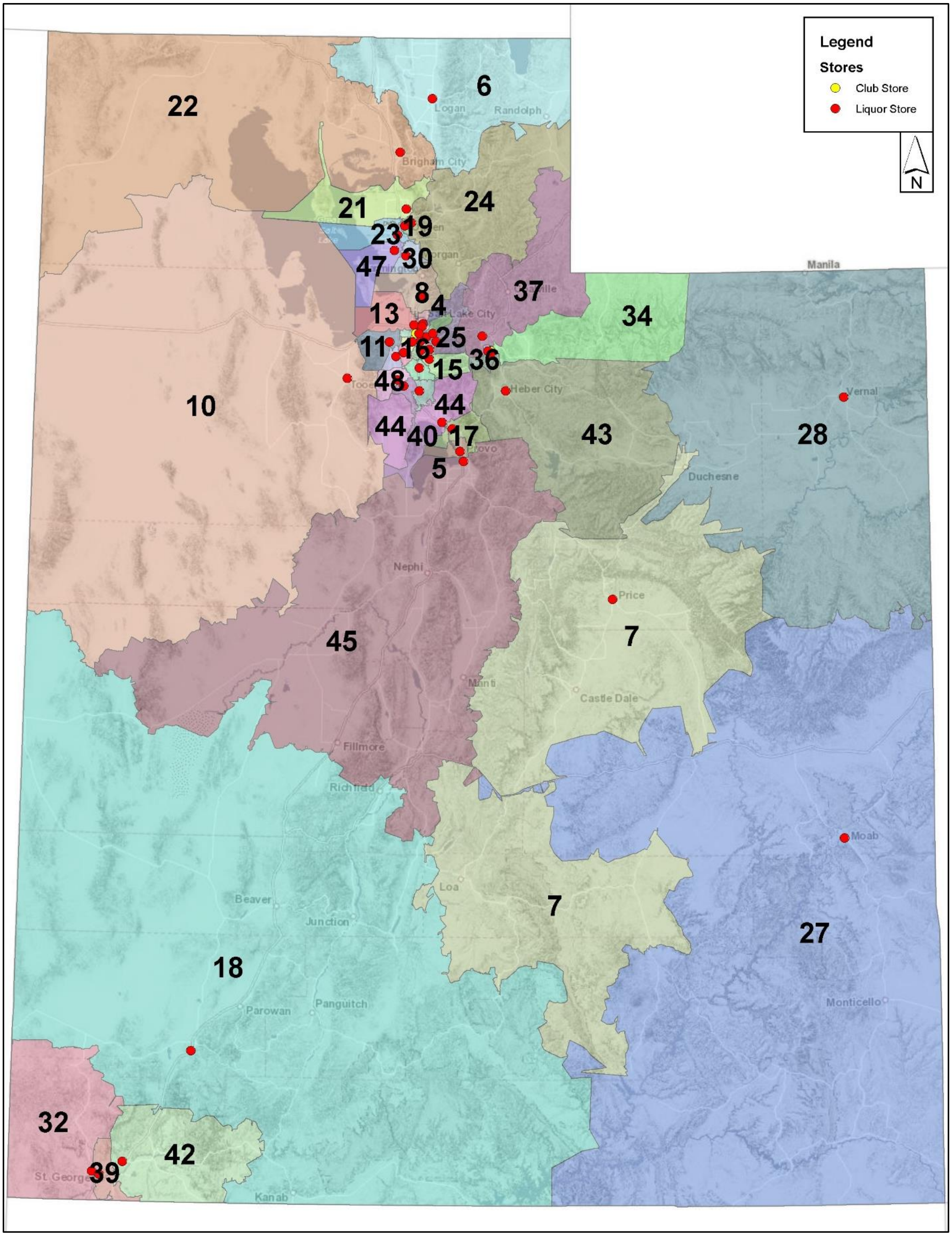
To better understand growth trends for each of the outlets, a sophisticated GIS analysis was conducted to determine the market area for each outlet, which calculated the nearest outlet, based on driving time, for the entire state.

The market area for each outlet varies significantly, with some as small as 3.65 square miles (store 41 in Salt Lake City), or as large as 17,802 square miles (store 18 in Cedar City), while the driving times range from a few minutes to more than 2 hours in more rural areas.

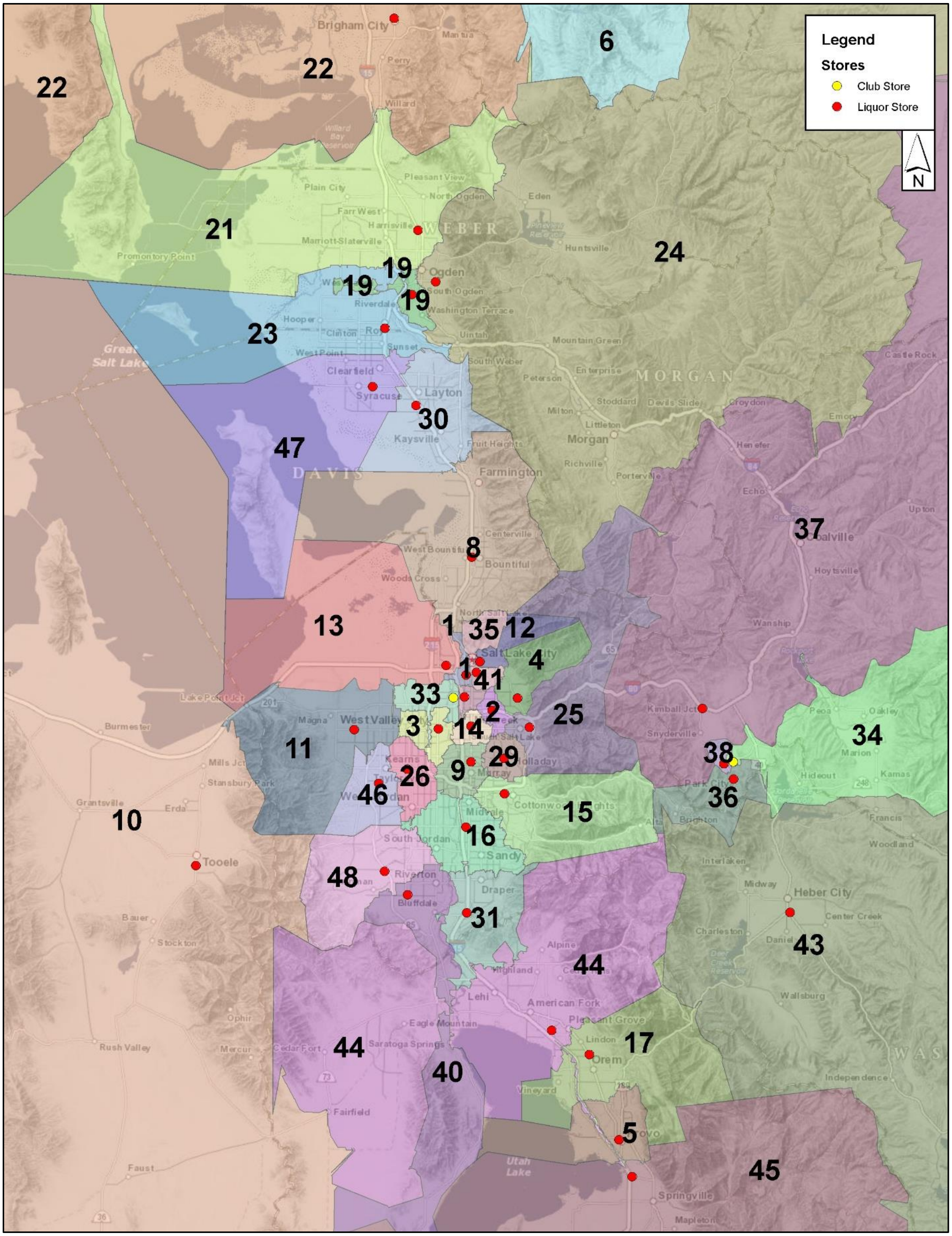
The following table lists the top 12 stores with the largest market areas. The largest market areas generally cover more rural areas.

Table 9: Market Area by Square Miles

Store	Street Address	City	Market Area (Sq Miles)
18	1580 S Providence Center Dr.	Cedar City	17,802
27	55 West 200 South	Moab	16,021
10	433 North Main	Tooele	11,032
07	50 North 100 West	Price	8,336
45	1551 North 1750 West	Springville	7,115
28	675 East Main	Vernal	7,049
22	43 South 100 West	Brigham City	5,246
43	262 East Gateway Dr.	Heber City	2,179
6	75 West 400 North	Logan	1,761
24	1156 Patterson Ave.	Ogden	1,343
32	929 West Sunset Blvd.	St. George	1,264
42	202 North Foothill Canyon Dr.	Hurricane	1,021
		Average – All Stores	**1,862**
		Average – Top 12 Stores	**6,681**



Market Area by State Liquor Store



Market Areas in the Wasatch Front

These market areas were then used to analyze different factors to determine which markets should have priority for additional liquor stores. Each of the stores were ranked from highest to lowest for each of the following factors:

- Market area
- Store square feet
- 2020 population
- 2030 population
- Absolute population growth 2018-2030
- 2020 population density
- Population density absolute growth 2020-2030
- Household incomes
- Per capita incomes
- Median age
- 2020 employment
- 2030 employment
- 2020 employment density
- March 2019 – Feb. 2020 gross revenues
- Bottles per man hour
- Bottles sold
- Bottles sold per capita
- Bottles sold per square foot
- Bottles sold per transaction
- Transactions
- Transactions per capita
- Sales per square foot
- Sales per capita

In consultation with the Department of Alcoholic Beverage Control, it was determined that there were six primary factors that would determine the priority for adding additional stores in certain markets. The factors selected include:

- 2020 population
- 2030 population
- Absolute population growth 2018-2030
- Population density 2020
- Bottles per man hour
- Transactions per capita

Population estimates and projections used in the market analysis are based on estimates collected from the Wasatch Front Regional Council's (WFRC) based on TAZs. The projections are updated every four years as part of the four-year Regional Transportation Plan update cycle and are produced in collaboration with the Mountainland Association of Governments.

The following sections review the findings for each of these six primary factors. Only the top 12 stores for each factor are listed in each section. Club stores are excluded from this portion of the analysis because, although any customer can shop at a them, they are significantly higher than regular stores in terms of revenues, number of transactions, and number of bottles sold. The potential for additional club stores is analyzed in a later section of this report.

2020 Population

Stores with large populations are all located along the Wasatch Front. The largest populations served are in the Pleasant Grove, Springville, and Sandy market areas. The Pleasant Grove market area currently covers a large area which includes Pleasant Grove, Lehi, and Eagle Mountain. The average population for the 12 stores with the largest populations is over 133,467, with the average population of all stores roughly half of that, at 72,366.

Table 10: Top Stores by 2020 Population in Market Area*

Rank	Store	City	2020 Population	Current Allowable Stores in Market Area
1	44	Pleasant Grove	218,903	4.56
2	45	Springville	217,467	4.53

Rank	Store	City	2020 Population	Current Allowable Stores in Market Area
3	16	Sandy	154,028	3.21
4	6	Logan	135,487	2.82
5	30	Layton	126,151	2.63
6	8	Bountiful	121,676	2.53
7	5	Provo	118,752	2.47
8	17	Orem	116,139	2.42
9	23	Roy	100,508	2.09
10	40	Riverton	99,774	2.08
11	21	Harrisville	96,826	2.02
12	26	Taylorsville	95,898	2.00
		Average – Top 12 Stores	**133,467**	
		Average – All Stores	**72,366**	

**Represents population in market area, not that of the city*

2030 Population

The list of stores with large projected populations in 2030 is similar to the stores with large populations in 2020, with almost the same stores listed in the top 12 for each. Pleasant Grove and Springville appear as number one and two, respectively, on both lists.

Table 11: Top Stores by 2030 Population in Current Market Area*

Rank	Store	City	2030 Population	Allowable Stores
1	44	Pleasant Grove	293,778	6.12
2	45	Springville	276,296	5.76
3	16	Sandy	167,842	3.50
4	6	Logan	160,716	3.35
5	40	Riverton	145,550	3.03
6	30	Layton	143,696	2.99
7	5	Provo	136,271	2.84
8	8	Bountiful	128,370	2.67
9	17	Orem	125,334	2.61
10	21	Harrisville	113,056	2.36
11	23	Roy	112,513	2.34
12	18	Cedar City	108,950	2.27
		Average – Top 12 Stores	**159,364**	
		Average – All Stores	**84,603**	

**Represents population in market area, not that of the city*

Absolute Population Growth, 2020-2030

The list of top stores based on projected population growth between 2020 and 2030 is very similar to the list of top stores based on current population, with Pleasant Grove and Springville listed in the top two for both factors. A notable store is Riverton which is ranked at 10 in 2020 Population but is expected to have the third highest growth in the next 10 years which will move it to the fifth largest population in terms of market area. Like Pleasant Grove, the Riverton market area currently covers a large portion of land including most of the west side of Utah lake including large sections of Saratoga Springs. This area is expected to see large growth by 2030.

Several of the stores with higher projected population growth are found outside of the Wasatch Front, including Logan, St. George, Tooele, and Hurricane. The average projected population growth for all stores is 12,364 while the top 12 stores average over 30,000.

Table 12: Top Stores by Absolute Population Growth, 2020-2030

Rank	Store	City	Absolute Pop. Growth 2020-2030	Additional Allowable Stores by Pop. Growth 2020-2030
1	44	Pleasant Grove	74,875	1.56
2	45	Springville	58,829	1.23
3	40	Riverton	45,776	0.95
4	31	Draper	25,971	0.54
5	6	Logan	25,229	0.53
6	32	St. George	24,198	0.50
7	39	St. George	22,501	0.47
8	10	Tooele	21,425	0.45
9	30	Layton	17,545	0.37
10	5	Provo	17,519	0.36
11	48	Herriman	17,422	0.36
12	42	Hurricane	16,561	0.35
		Average – Top 12 Stores	**30,654**	
		Average – All Stores	**12,364**	

Population Density, 2020

Stores with the greatest population density are all located along the Wasatch Front, with the majority located in Salt Lake City. These areas generally have much larger populations in much smaller areas than the average store's market area.

Table 13: Top Stores by Population Density, 2020

Rank	Store	City	2020 Population	Square Miles	Pop. Density (per Sq. Mile)
1	2	Salt Lake City	37,248	5.66	6,581
2	1	Salt Lake City	24,254	3.91	6,197
3	14	Salt Lake City	36,311	6.27	5,795
4	3	West Valley City	70,608	12.35	5,716
5	26	Taylorsville	95,898	17.06	5,622
6	41	Salt Lake City	18,117	3.65	4,967
7	9	Murray	65,672	13.71	4,788
8	29	Holladay	46,851	10.05	4,664
9	16	Sandy	154,028	37.07	4,155

Rank	Store	City	2020 Population	Square Miles	Pop. Density (per Sq. Mile)
10	35	Salt Lake City	44,530	13.29	3,350
11	46	West Valley City	82,811	26.10	3,173
12	19	Ogden	27,916	11.42	2,445
		Average – Top 12 Stores	**58,687**	**13.38**	**4,788**
		Average – All Stores	**72,238**	**1,862**	**1,678**

Bottles per Man Hour

Bottles per man hour is the key metric used by ABC to gauge store performance. The highest performing stores generally sell between 74 and 87 bottles per man hour.

Table 14: Top Stores by Bottles per Man Hour

Rank	Store	City	Bottles per Man Hour
1	37	Park City	87.79
2	12	Salt Lake City	87.24
3	44	Pleasant Grove	86.30
4	25	Millcreek	83.62
5	27	Moab	83.05
6	39	St. George	82.99
7	21	Harrisville	80.88
8	31	Draper	80.50
9	24	Ogden	79.47
10	15	Cottonwood Heights	75.11
11	16	Sandy	74.40
12	08	Bountiful	74.02
		Average – Top 12 Stores	**81.28**
		Average – All Stores	**64.11**

Transactions per Capita

Likewise, transactions per capita is a good indicator of store performance. Stores with the most transactions per capita are generally located in more urban areas with smaller populations, indicating that the average person in these areas has more transactions than the average person in another market area.

Table 15: Top Stores by Transactions per Capita

Rank	Store	City	2020 Population	Transactions per Capita
1	38	Park City	3,093	78.41
2	36	Park City	1,858	27.94
3	1	Salt Lake City	24,254	16.55

Rank	Store	City	2020 Population	Transactions per Capita
4	12	Salt Lake City	13,171	16.48
5	2	Salt Lake City	37,248	12.97
6	19	Ogden	27,916	10.81
7	25	Millcreek	25,875	10.56
8	37	Park City	26,364	10.44
9	41	Salt Lake City	18,117	9.16
10	29	Holladay	46,851	7.89
11	15	Cottonwood Heights	79,483	6.25
12	9	Murray	65,672	6.22
		Average – Top 12 Stores	**30,825**	**17.81**
		Average – All Stores	**72,366**	**7.06**

Potential for New Outlets

The potential for new outlets was determined by a creating a weighted average rank for each of the stores. This process included:

Step 1: Each store was ranked from highest to lowest on each of the primary factors previously listed;

Step 2: Weights based on priority were assigned to each of the factors. It was determined that each of the primary six factors fell under one of two categories: population and store performance, and that population and store performance were equally as important when determining which market areas to consider for additional stores. The six factors were then assigned a weight based on their priority, relative to the other factors, when determining market areas for expansion. The weights for each of the factors are listed in the table below.

Table 16: Analysis Factors by Weight

Factor	Weight
Population	**50%**
Population – 2020	20%
Population – 2030	10%
Absolute Population Growth 2020-2030	10%
Population Density – 2020	10%
Store Performance	**50%**
Bottles per Man Hour	30%
Transactions per Capita	20%

Step 3: The weights above were multiplied by the rankings from Step 1 to determine the weighted average rank for each of the stores. The weighted rank for all stores is listed in the following table.

Appendix A includes a sensitivity analysis for the weighted factors with alternative weight scenarios.

Table 17: Store Priorities based on Weighted Ranks for 2020

Priority	Store	City	Weighted Rank
1	16	Sandy	11.5
2	44	Pleasant Grove	12.2
3	31	Draper	13.9
4	40	Riverton	14.0
5	21	Harrisville	14.2
6	39	St. George	14.6
7	8	Bountiful	16.4
8	30	Layton	17.0
9	15	Cottonwood Heights	17.4
10	3	West Valley City	18.1
11	6	Logan	18.2
12	24	Ogden	18.2
13	2	Salt Lake City	18.3
14	29	Holladay	19.6
15	45	Springville	19.7
16	37	Park City	20.2
17	12	Salt Lake City	20.4
18	23	Roy	21.1
19	19	Ogden	22.0
20	25	Millcreek	22.0
21	9	Murray	22.2
22	46	West Valley City	22.7
23	1	Salt Lake City	23.0
24	18	Cedar City	23.0
25	27	Moab	23.7
26	13	Salt Lake City	23.9
27	26	Taylorsville	24.2
28	5	Provo	24.3
29	17	Orem	24.9
30	10	Tooele	24.9
31	38	Park City	25.5
32	41	Salt Lake City	25.8
33	43	Heber City	25.9
34	11	Magna	26.8
35	14	Salt Lake City	27.6
36	42	Hurricane	28.3
37	47	Syracuse	28.7
38	48	Herriman	29.0
39	32	St. George	29.9
40	4	Salt Lake City	30.6
41	35	Salt Lake City	31.3
42	22	Brigham City	33.5
43	28	Vernal	34.1
44	36	Park City	34.8
45	7	Price	37.4

There are currently plans to add five more stores in the Wasatch Front area. The full impact of these new stores is unknown, but the following table shows the new rankings in priority if the market areas covered by new stores are removed from consideration.

Table 18: Store Priorities with Consideration for Planned Stores

Priority	Store	City	Weighted Rank
1	31	Draper	13.9
2	21	Harrisville	14.2
3	39	St. George	14.6
4	15	Cottonwood Heights	17.4
5	6	Logan	18.2
6	24	Ogden	18.2
7	29	Holladay	19.6
8	45	Springville	19.7
9	37	Park City	20.2
10	12	Salt Lake City	20.4
11	23	Roy	21.1
12	19	Ogden	22.0
13	46	West Valley City	22.7
14	1	Salt Lake City	23.0
15	18	Cedar City	23.0
16	27	Moab	23.7
17	13	Salt Lake City	23.9
18	26	Taylorsville	24.2
19	5	Provo	24.3
20	17	Orem	24.9
21	10	Tooele	24.9
22	38	Park City	25.5
23	41	Salt Lake City	25.8
24	43	Heber City	25.9
25	11	Magna	26.8
26	14	Salt Lake City	27.6
27	42	Hurricane	28.3
28	47	Syracuse	28.7
29	48	Herriman	29.0
30	32	St. George	29.9
31	4	Salt Lake City	30.6
32	35	Salt Lake City	31.3
33	22	Brigham City	33.5
34	28	Vernal	34.1
35	36	Park City	34.8
36	7	Price	37.4
1*	16	Sandy	11.5
2*	44	Pleasant Grove	12.2
4*	40	Riverton	14.0
7*	8	Bountiful	16.4
8*	30	Layton	17.0
10*	3	West Valley City	18.1

Priority	Store	City	Weighted Rank
13*	2	Salt Lake City	18.3
20*	25	Millcreek	22.0
21*	9	Murray	22.2

**Priority before consideration of planned stores*

There have been some changes between the 2020 priorities and the priorities from 2018 and 2016 for new stores. Changes in store performance, current population numbers, and the construction of new stores are all factors that may have had an influence these changes. A comparison of the two rankings can be found in Table 19. It is notable that Sandy, Pleasant Grove, and Riverton have been in the top 5 since 2016.

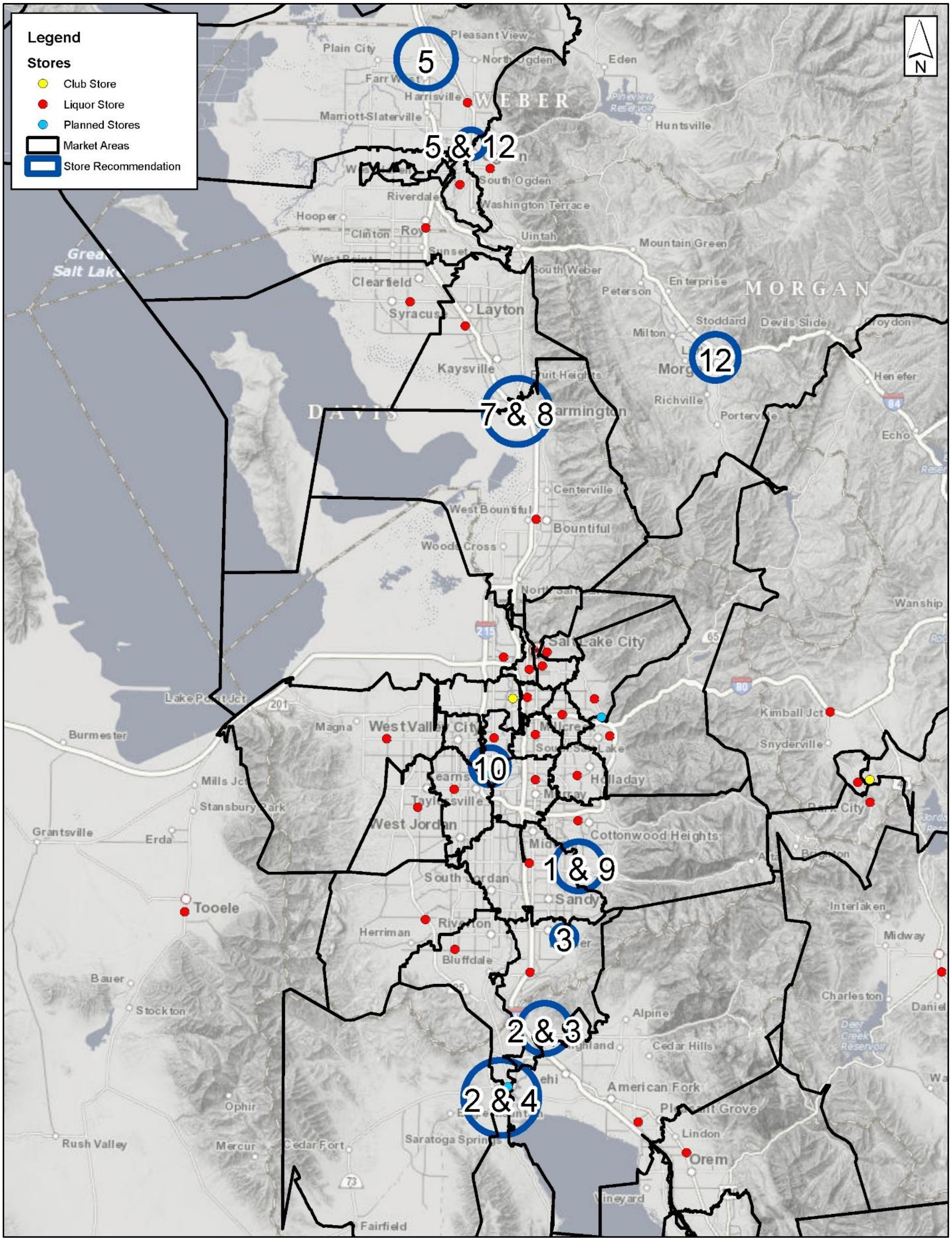
Table 19: Comparison of 2020, 2018, and 2016 Priorities by Weighted Rank

Priority	2020 Weighted Rank	2018 Weighted Rank	2016 Weighted Rank
1	Sandy	Sandy	Riverton
2	Pleasant Grove	Pleasant Grove	Layton
3	Draper	Riverton	Pleasant Grove
4	Riverton	Draper	Sandy
5	Harrisville	Harrisville	Taylorsville
6	St. George	Layton	Harrisville
7	Bountiful	Cottonwood Heights	Roy
8	Layton	Ogden	West Valley City
9	Cottonwood Heights	West Valley City	Bountiful
10	West Valley City	Holladay	Draper
11	Logan	St. George	Ogden
12	Ogden	Logan	Cottonwood Heights

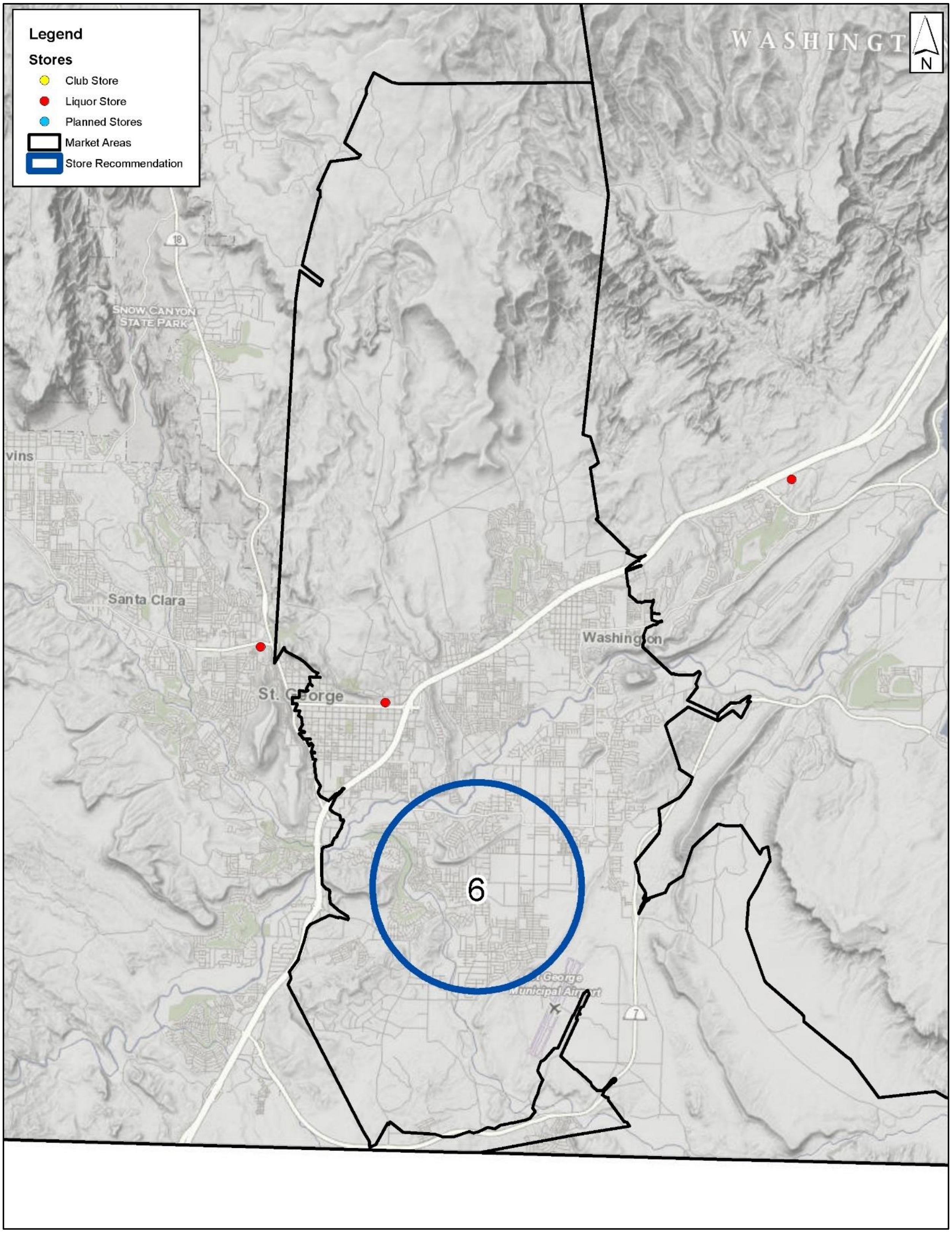
The results in the prioritization list do not necessarily mean that a new store should be placed in Sandy. For example, it means that the market area covered by store 16, which is in Sandy, should be prioritized when considering locations for new stores. There are currently plans to build a new store that would help serve this market.

The following maps show recommended store locations for additional stores in the top 12 market areas. The general site recommendations, which are indicated by blue circles, are based on projected population growth within the market area of each store and are only general recommendations for new store locations. Actual store locations may vary based on real estate availability and the closest municipalities for the needed geographic area. Note that some recommendations cover multiple market areas, such as Sandy and Cottonwood Heights (Priorities 1 & 9). This is used to show how strategically placed stores have the potential to serve the needs of multiple market areas. The following sections include additional information regarding general site recommendations for the top 12 stores.

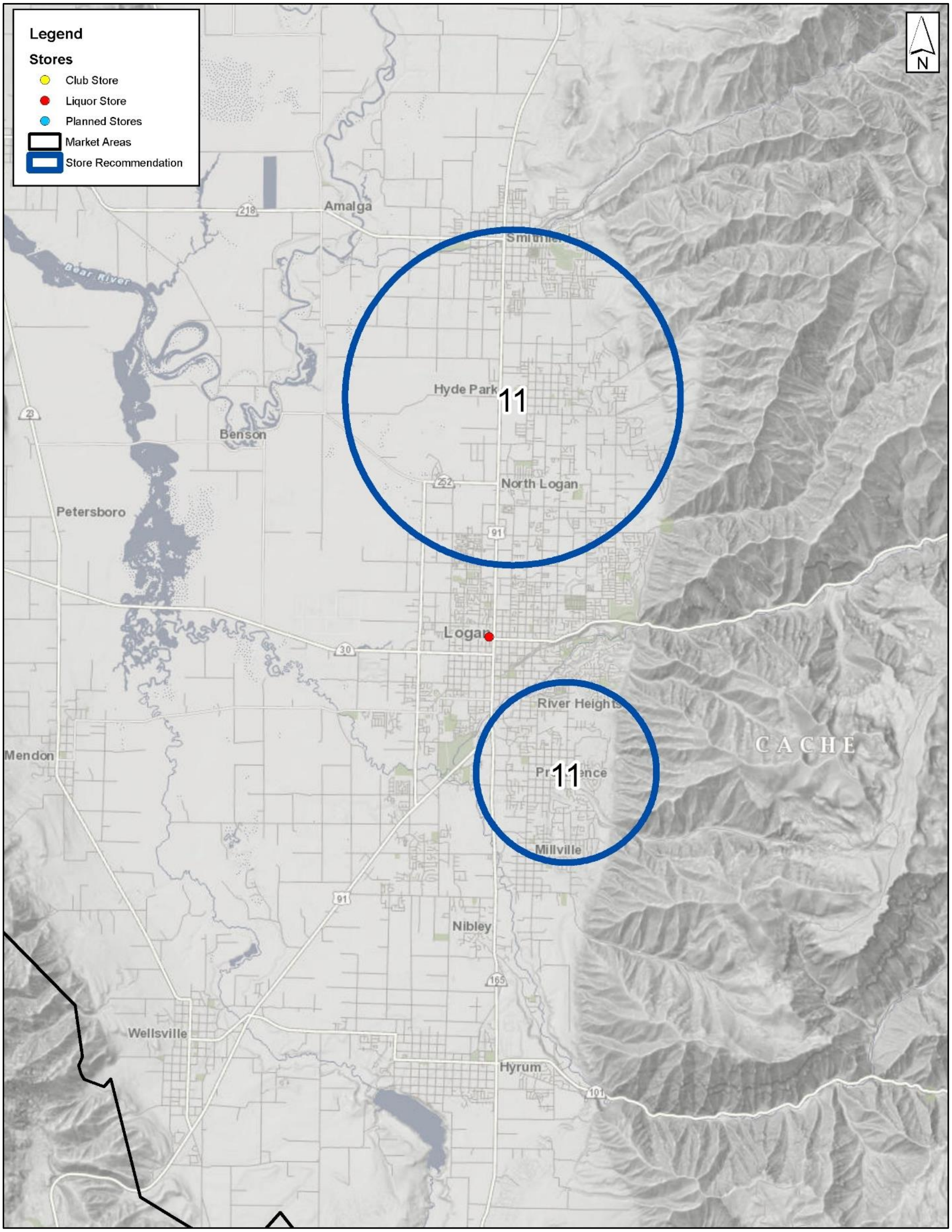
The time frame for adding additional stores will vary. Department officials will need to regularly monitor store performance and demographic changes when determining the timing for new stores.



Store Recommendations – Wasatch Front



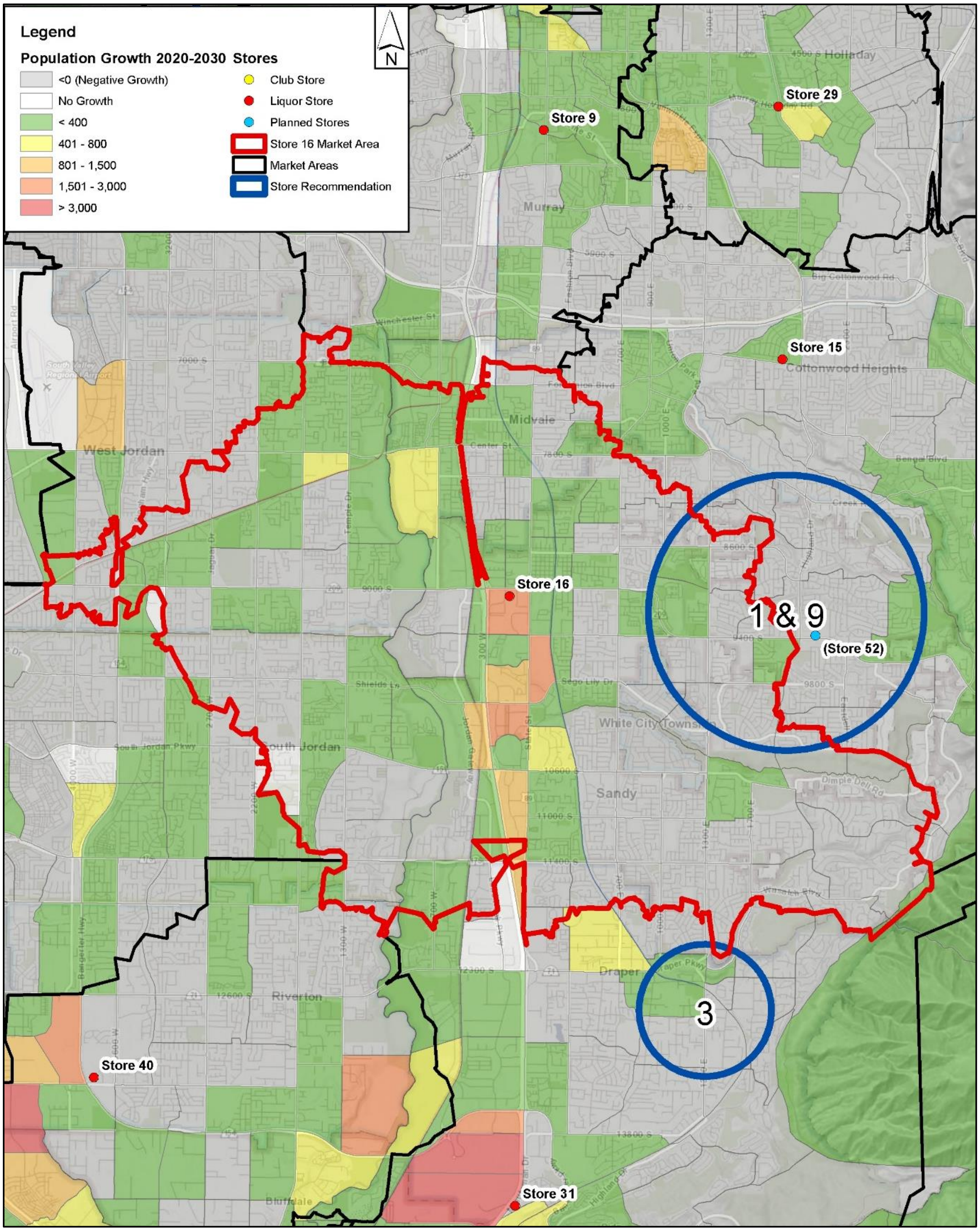
Store Recommendation – St. George Area



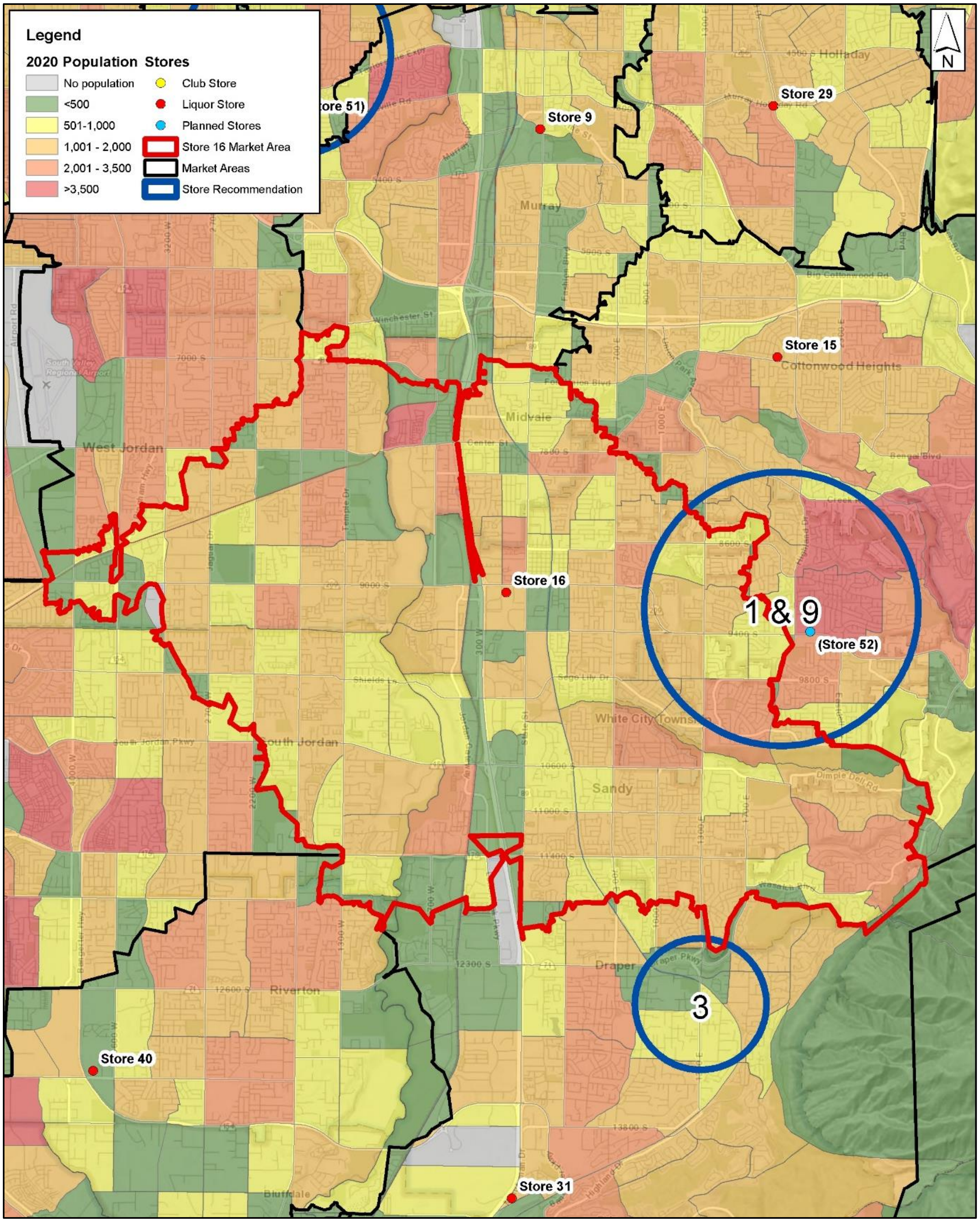
Store Recommendations – Logan Area

Priority 1: Store 16 - Sandy

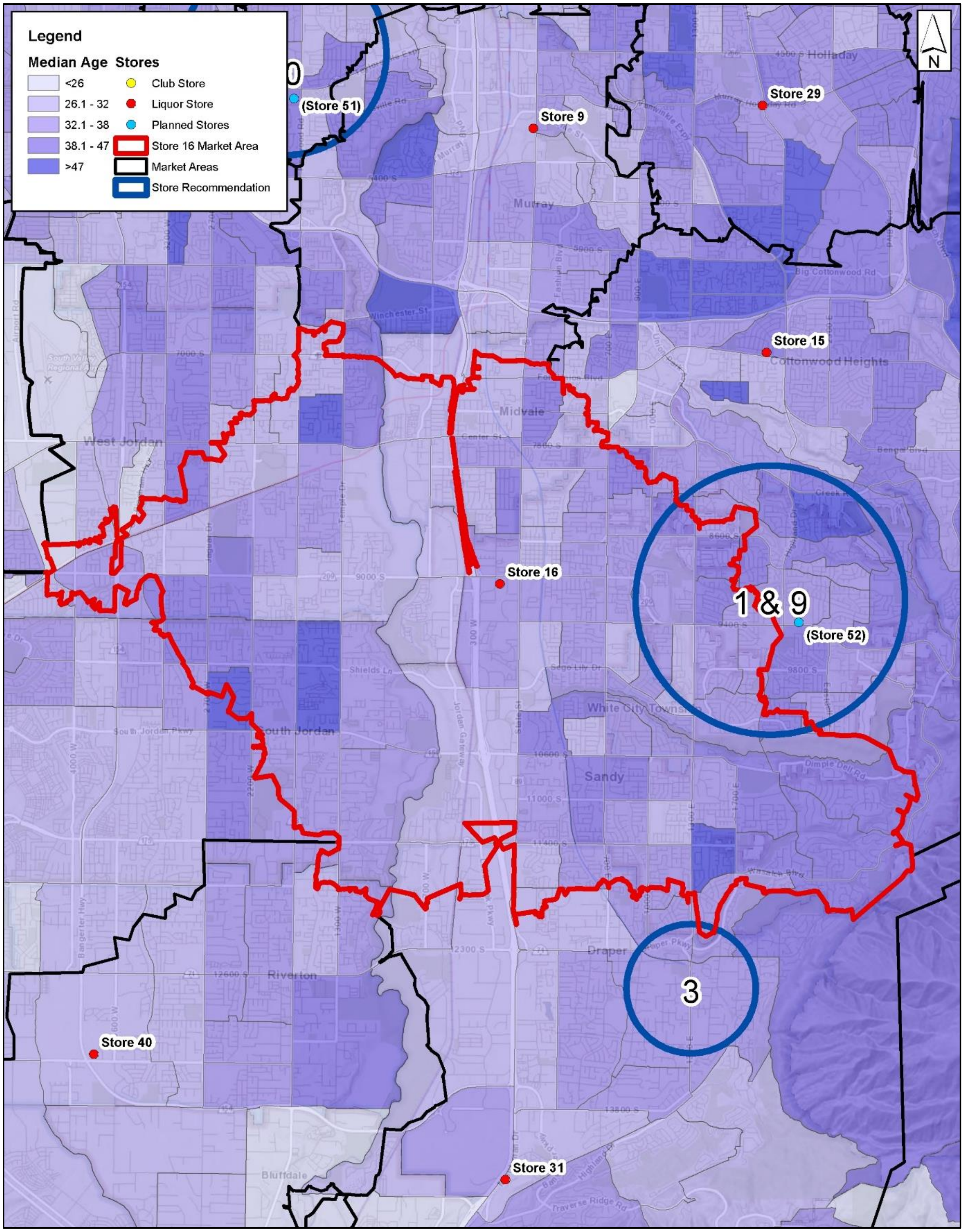
Store 16 is ranked 3rd overall in 2020 population and 2030 projected population. The majority of growth in the area is projected to occur directly around the existing store. The location of a planned store (Store 52) in the eastern part of Sandy is anticipated to be completed in 2022 and will also serve to reduce demand on Store 15 in Cottonwood Heights which is 9th on the priority list.



The map below shows the current projected population within Store 16's market area. While population is heavy and fairly evenly spread, there is a portion of Store 15's market area which has a high population near the eastern border of Store 16. Planned Store 52 will help reduce the demand caused by new growth around Store 16 and will additionally aid Store 15's current population.

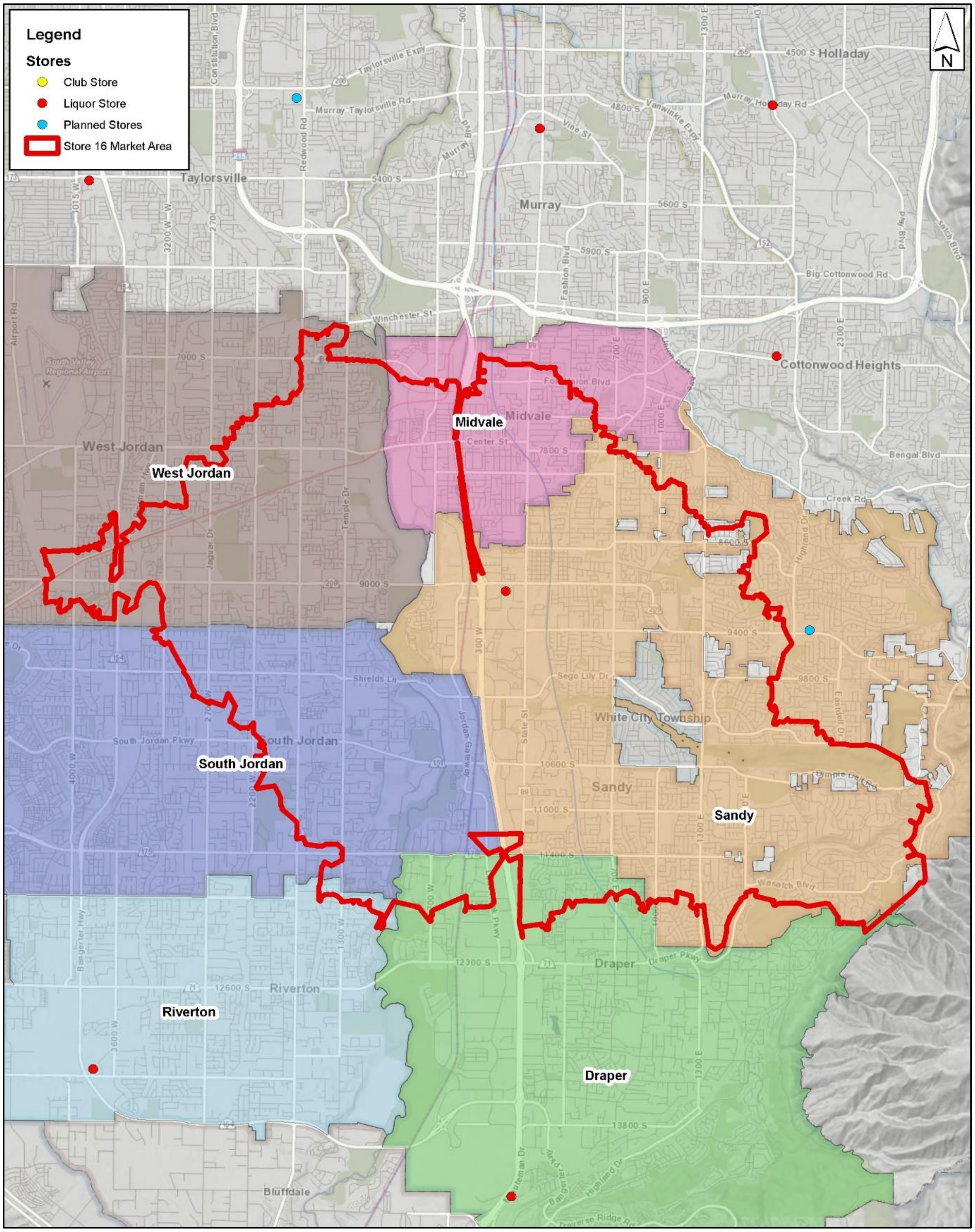


The analysis on higher producing stores, which is shown later in this report, showed a correlation between higher sales and a higher median age. The top 12 performing stores in Sales per Capita and Sales per Square Feet had a higher median age then the State average. Planned Store 52 in Sandy will serve an area with a higher median age as shown below.



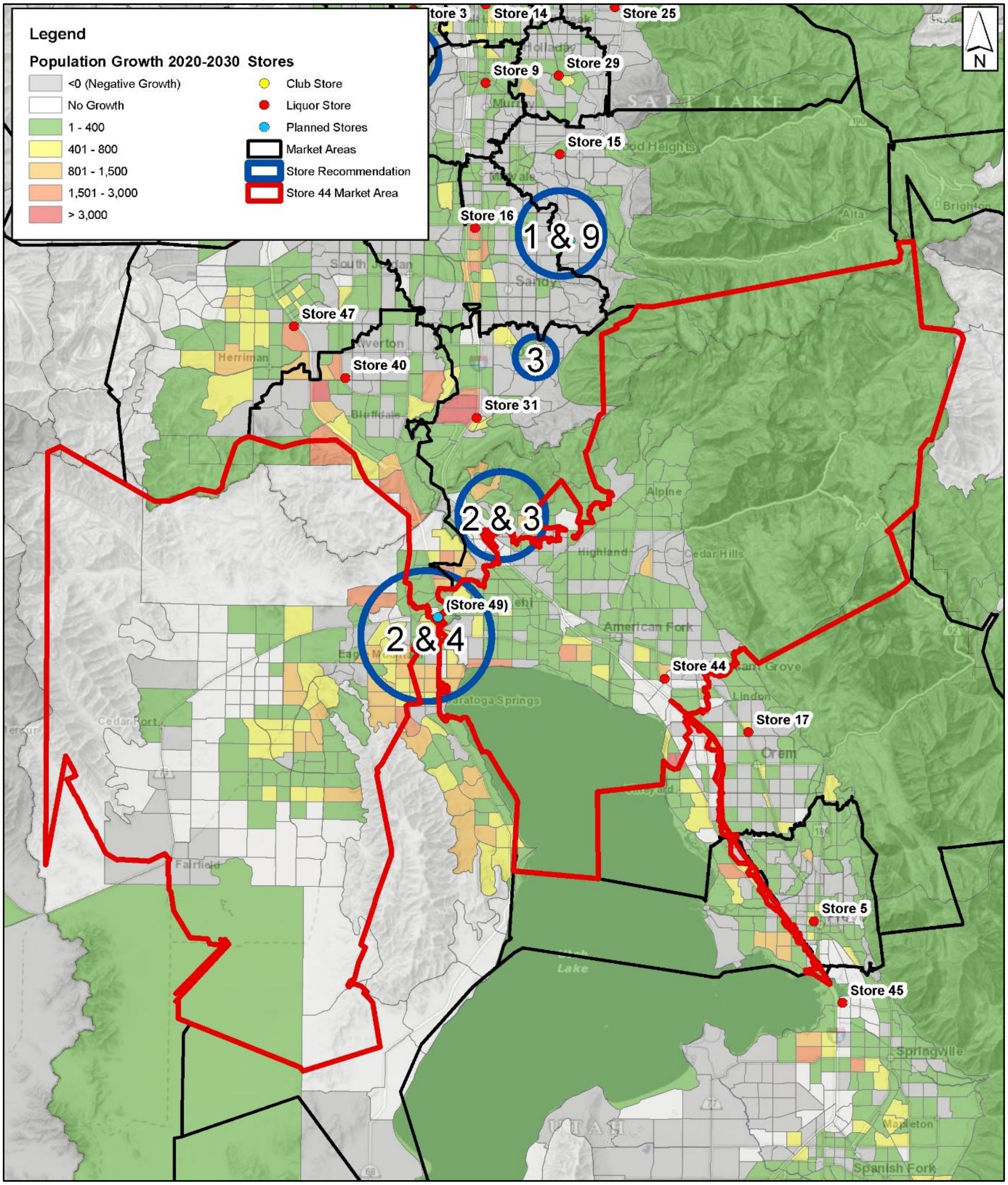
Municipalities located in the market area include:

- West Jordan
- Midvale
- Sandy
- South Jordan
- Draper
- Riverton

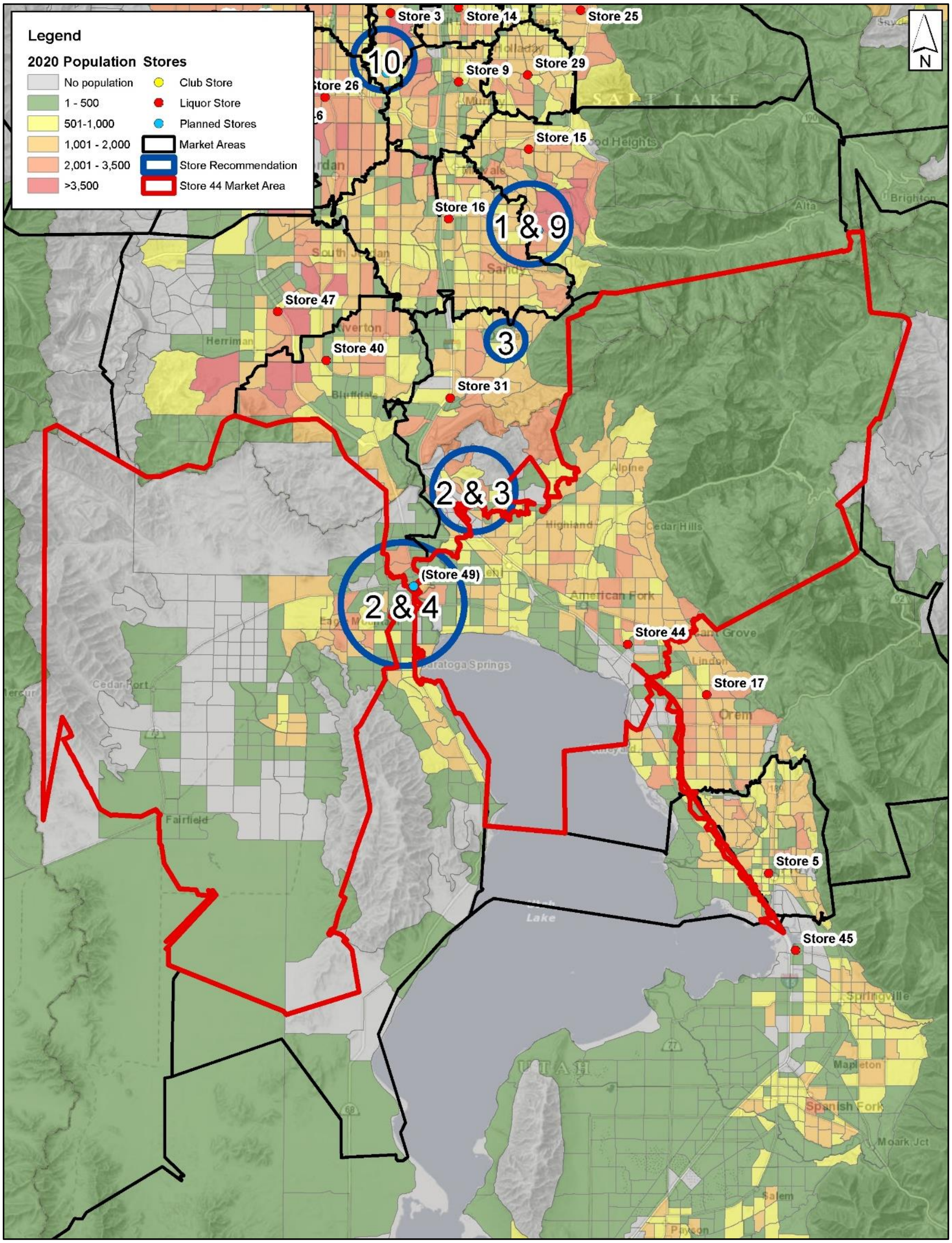


Priority 2: Store 44 – Pleasant Grove

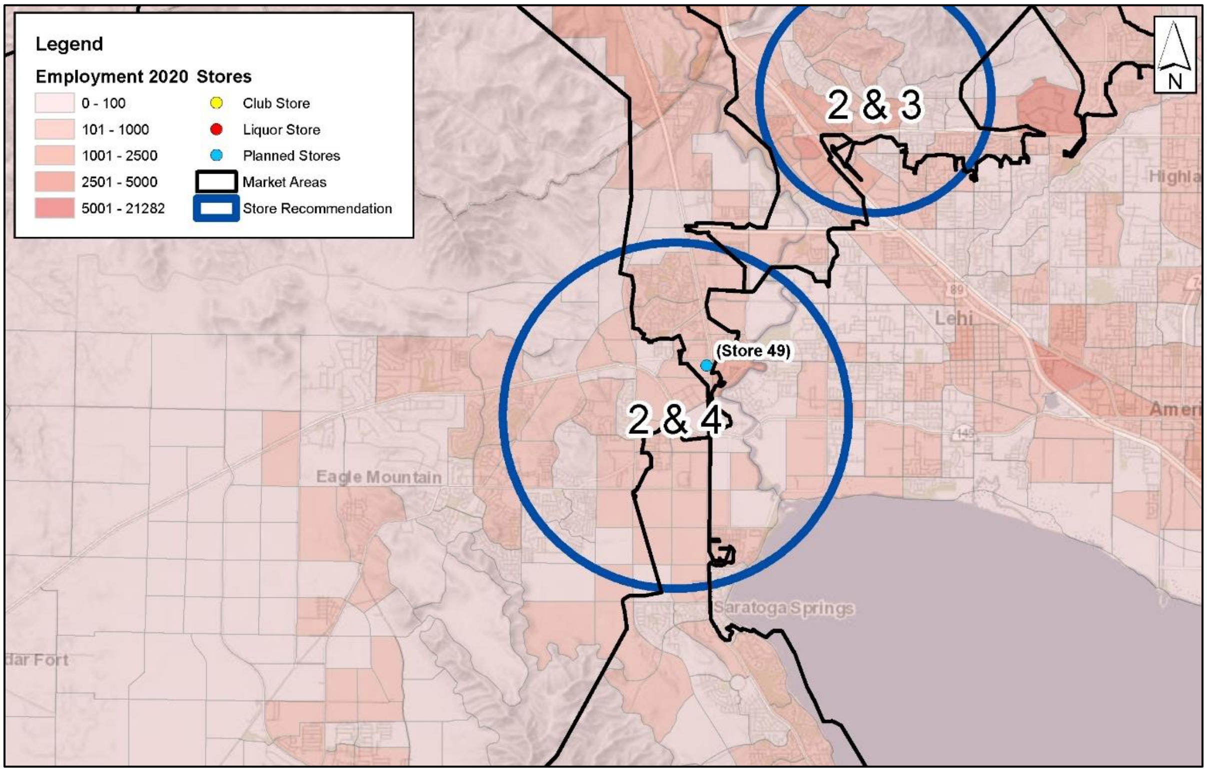
The store in Pleasant Grove ranks 1st in 2020 Population, 2030 Population, and Population Growth 2020-2030. The store covers Eagle Mountain, Cedar Fort, and covers a large portion of Saratoga Springs. A new store (Store 49) has been planned within the Saratoga Springs area and is anticipated to open in November 2020. A store in this location has the potential to serve all the growing communities on the west side of Utah Lake and would also help with the demand placed on store 40 (Riverton) which also covers this area.

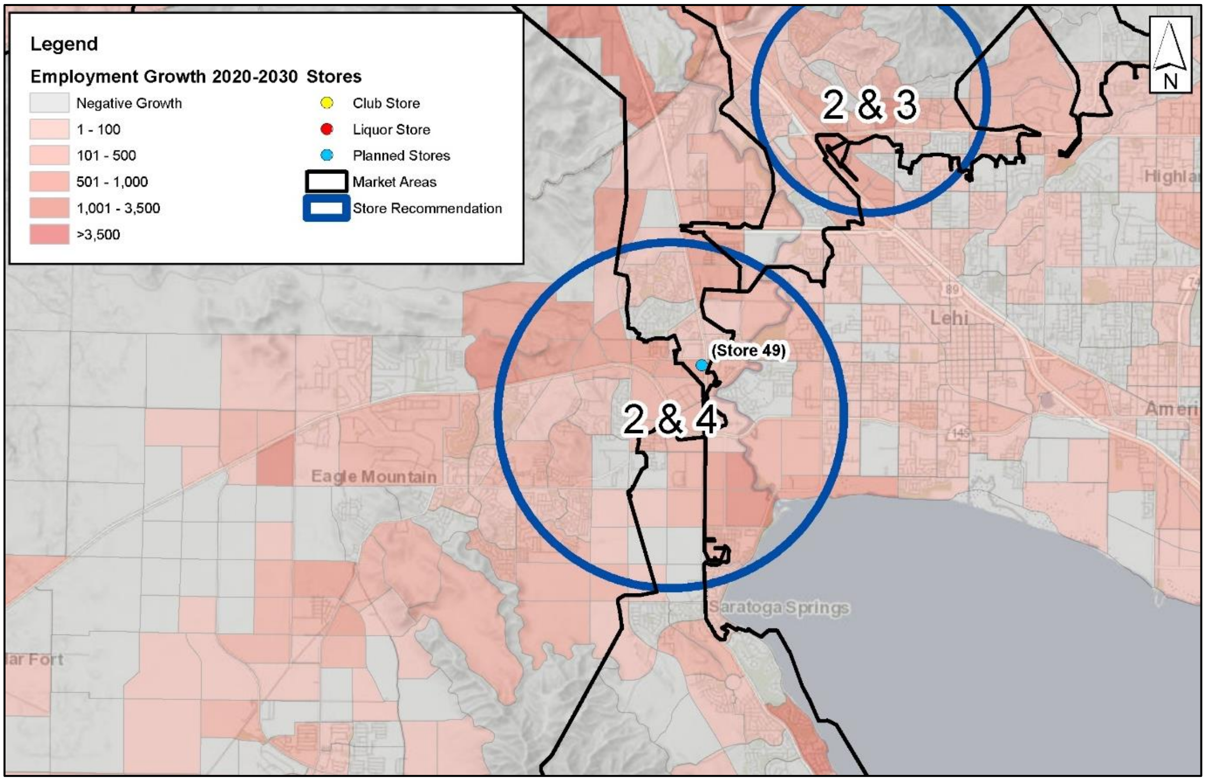


Currently, most of the area's population is located in and around Pleasant Grove and Highland. Saratoga Springs and Eagle Mountain have seen significant growth recently and the trend is expected to continue. Store 44 ranked 1st in 2020 population with an estimated population of over 218,000 residents.



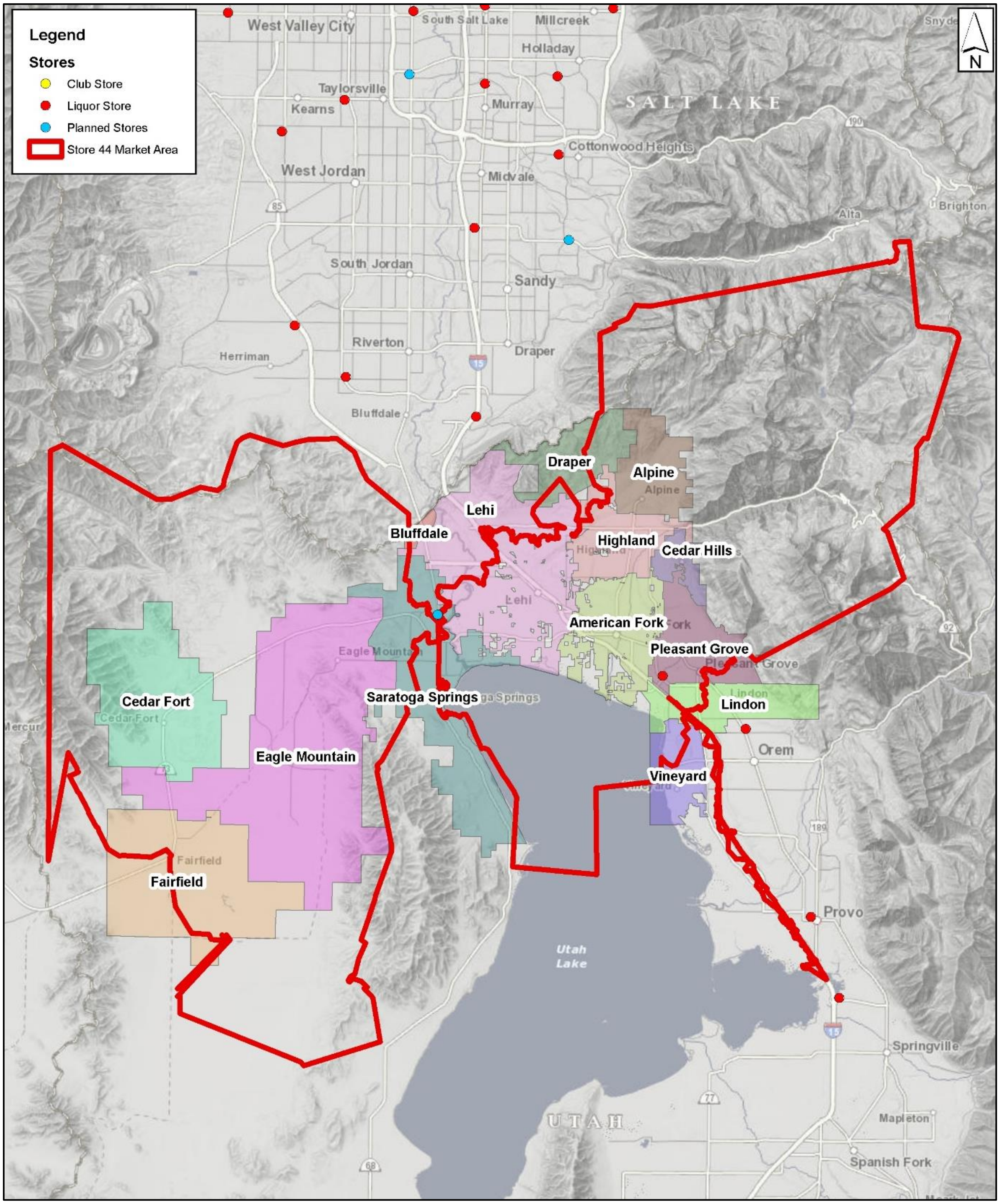
The maps below show the current and future growth of employees located near the planned location of Store 49. An analysis on sales numbers has shown that market areas with higher employment numbers average higher sales. It is projected that the employment in this area will increase substantially by 2030.





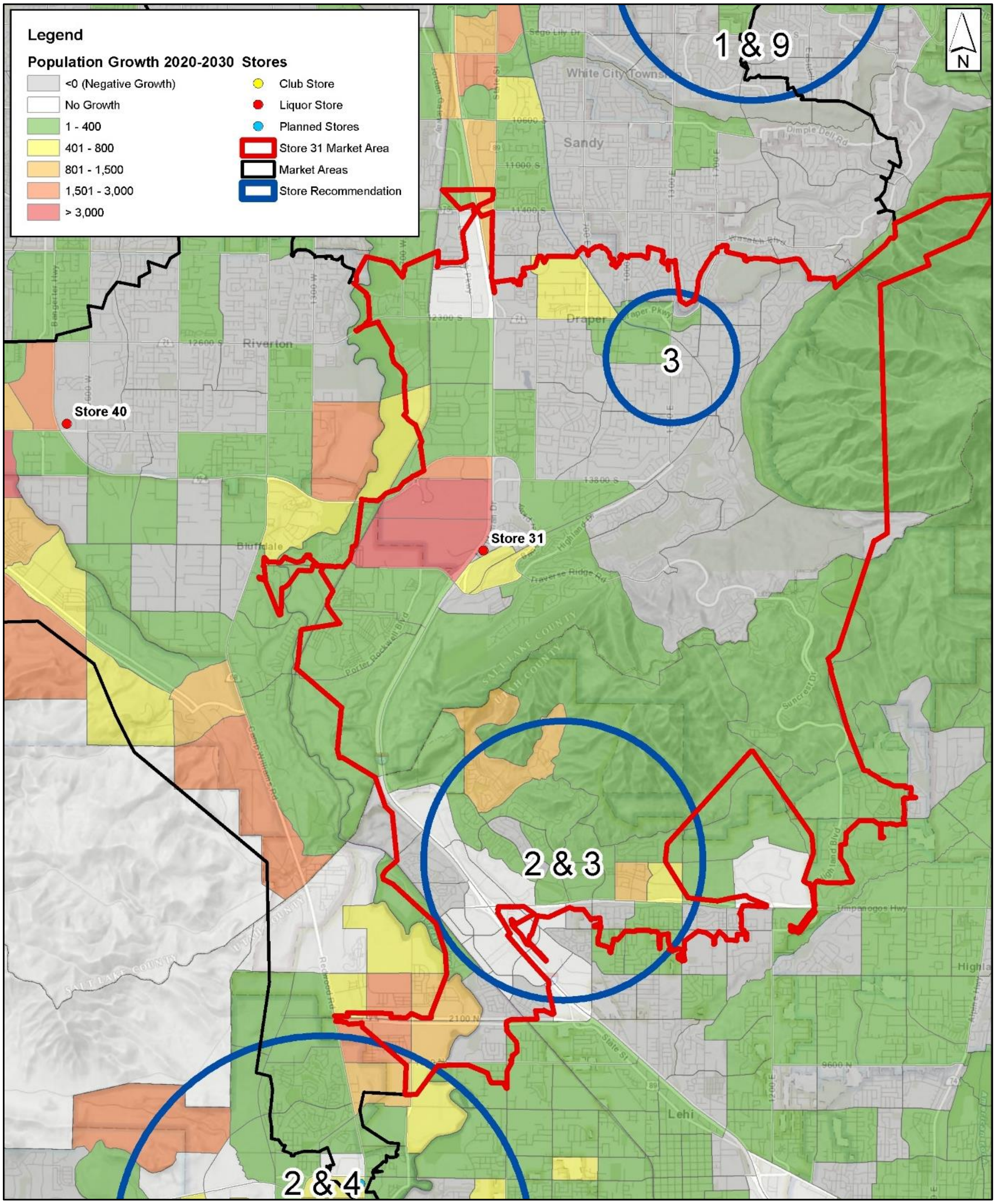
Municipalities located in these market areas include:

- Cedar Fort
- Eagle Mountain
- Fairfield
- Saratoga Springs
- Bluffdale
- Lehi
- Highland
- Alpine
- American Fork
- Cedar Hills
- Pleasant Grove
- Lindon
- Vineyard

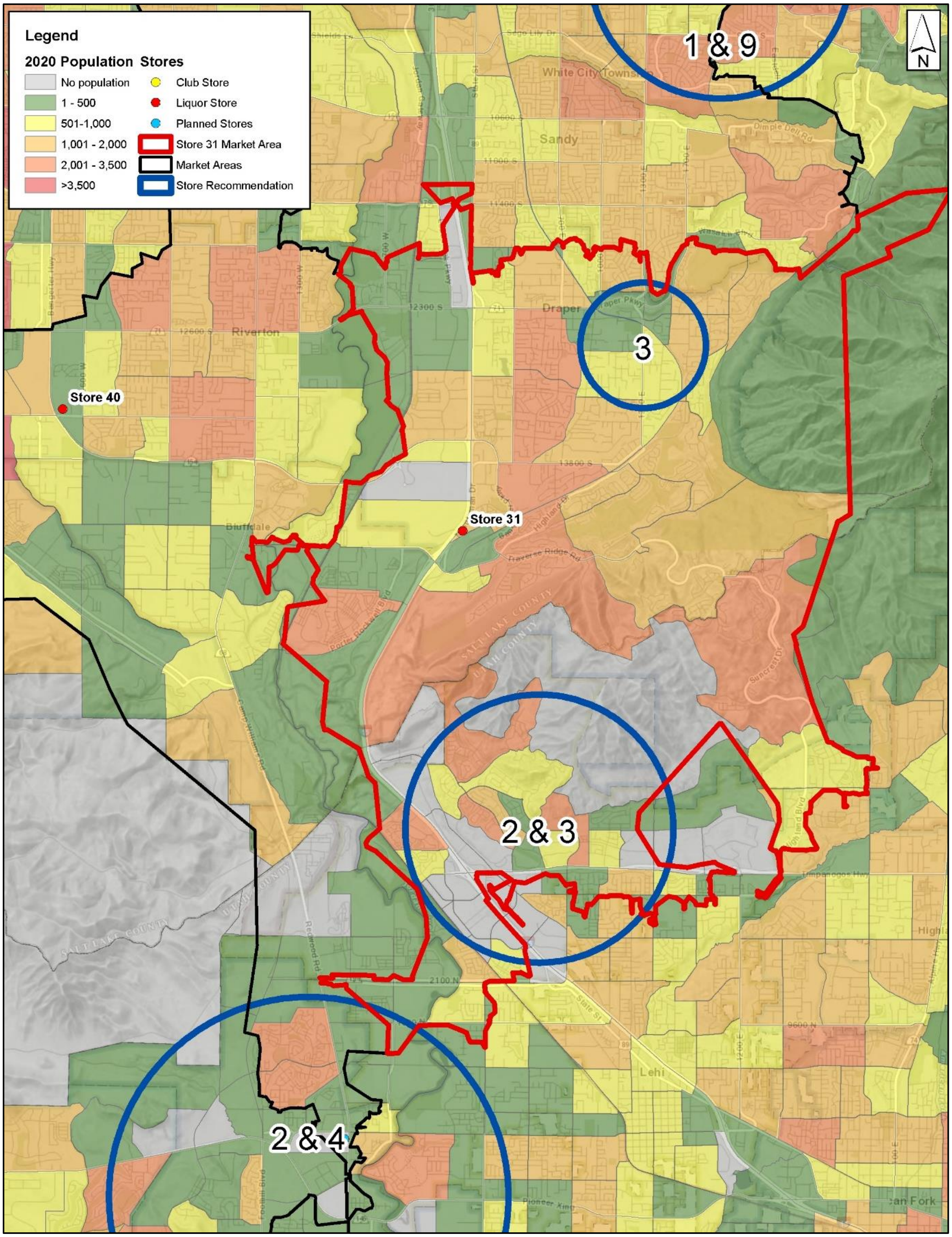


Priority 3: Store 31 – Draper

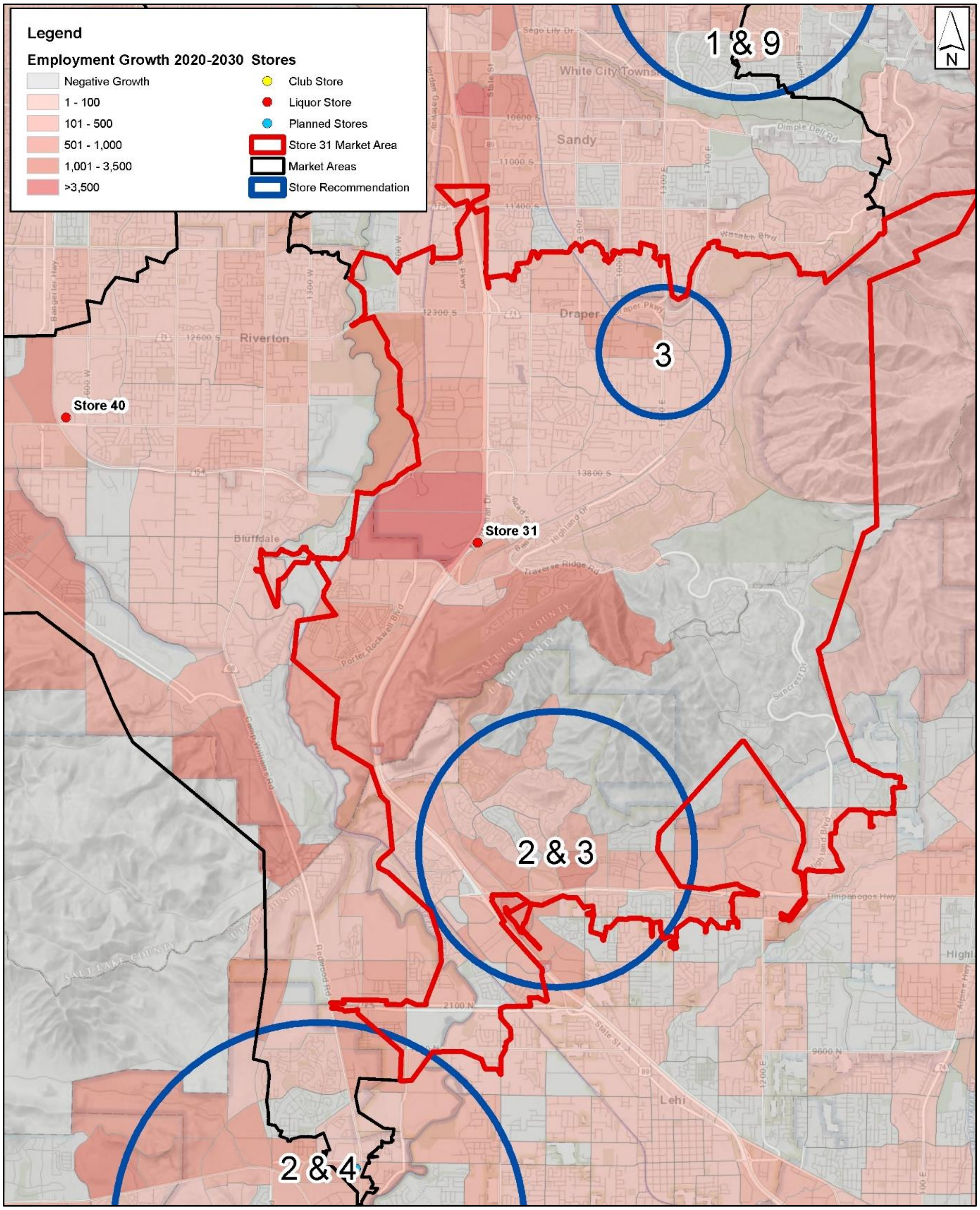
The current location of the Utah State Prison is expected to be redeveloped into a large, 750-acre mixed-use community. Current TAZ projections indicate an increase of over 16,000 people. This development will be in close proximity to Store 31. An additional store in the northeast area of Draper could help relieve the demand created by this growth. Another option would be to place a store in Lehi to help facilitate the growth in that area.



The map below shows the current population and shows how additional stores in the recommended areas would help alleviate the additional growth in population anticipated near the existing Store 31 in Draper.

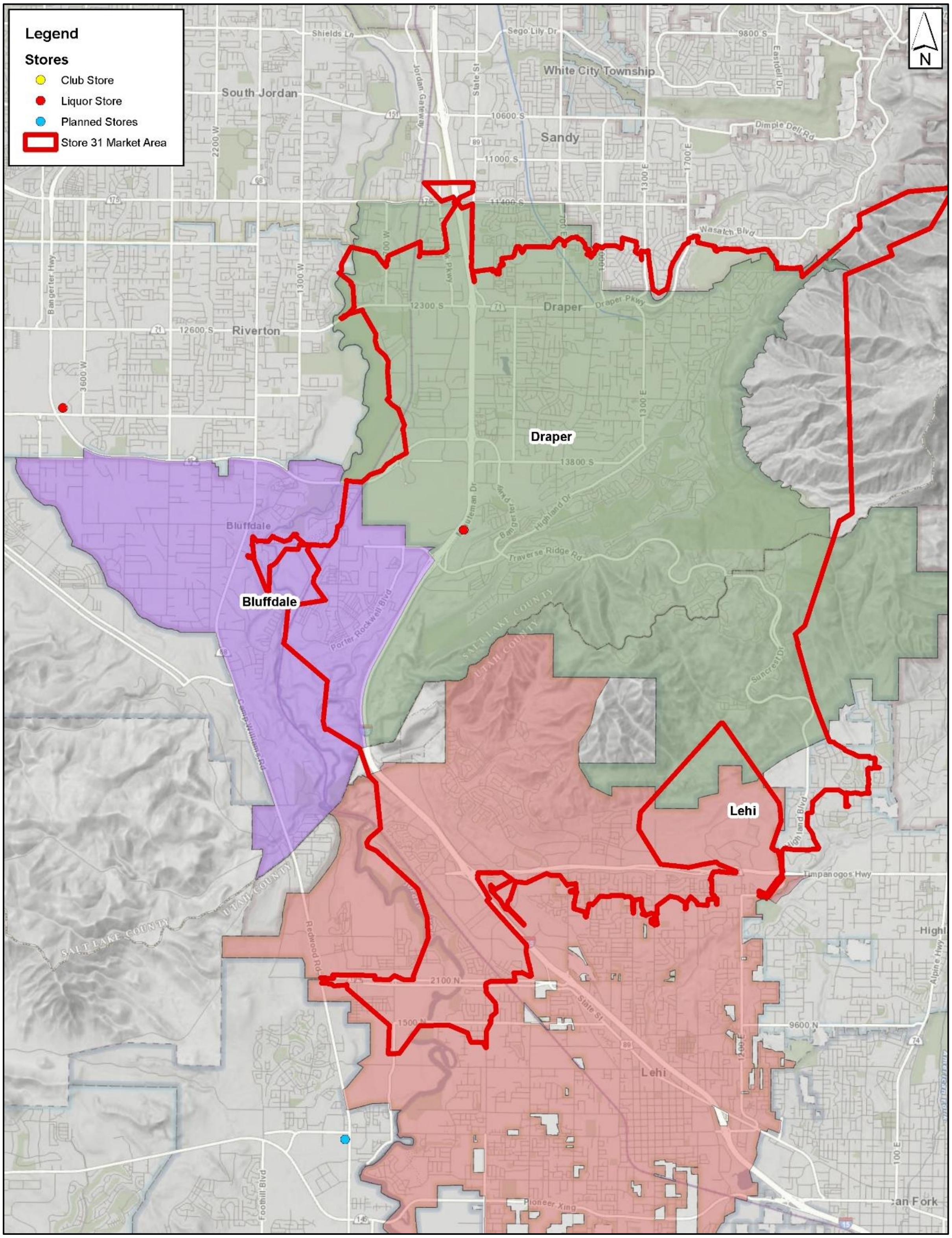


The redevelopment of the State Prison will also include substantial office, commercial, and mixed-use areas. The projections indicate this area could grow by almost 15,000 jobs. Store 31 is currently ranked 11th in the state in number of employees. It is expected to rank 6th in 2030 due to new growth. This growth combined with increases in population further justify a new store in this area to reduce an incredible increase in demand from population and employment growth.



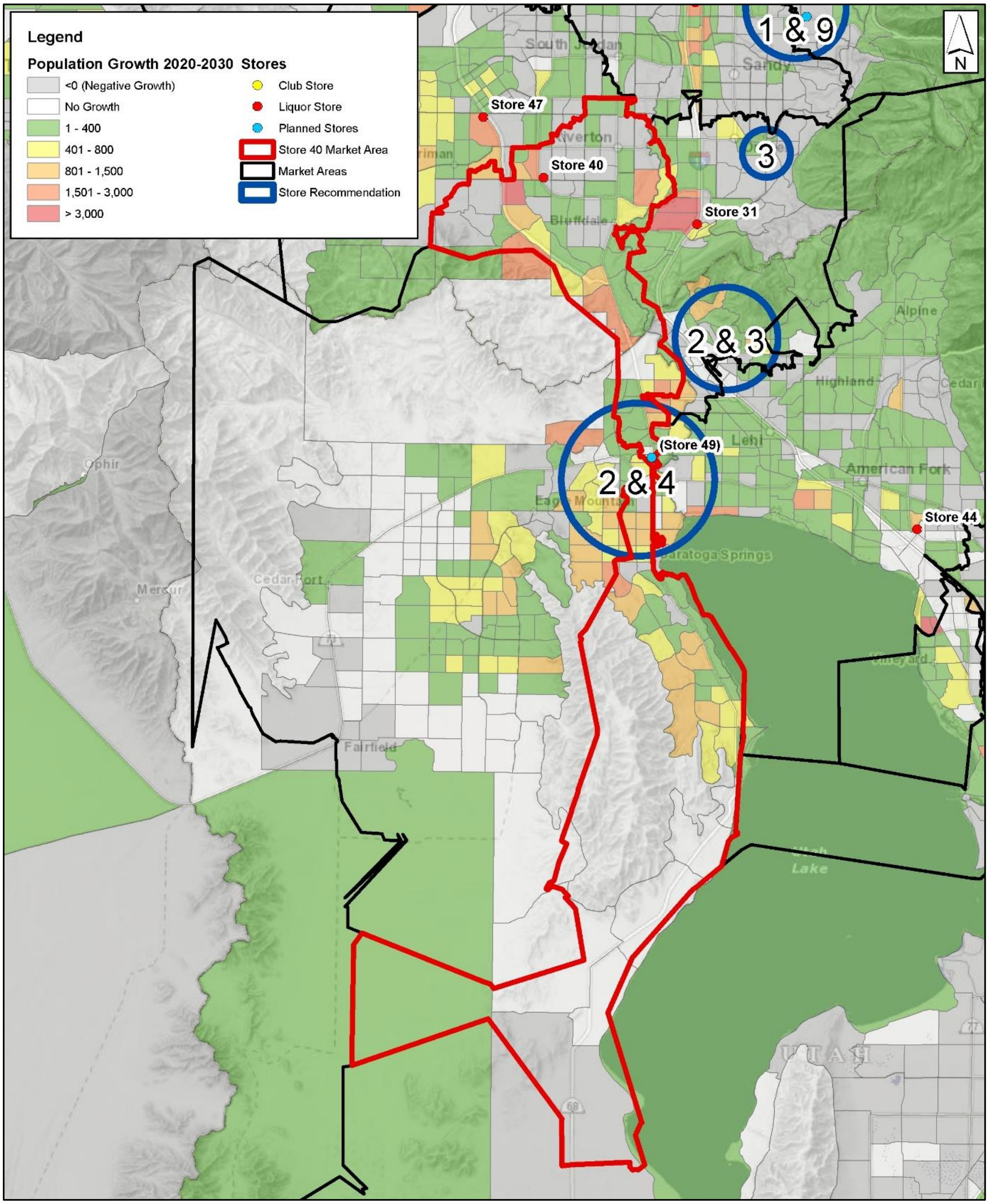
Municipalities located in this market area include:

- Draper
- Bluffdale
- Lehi

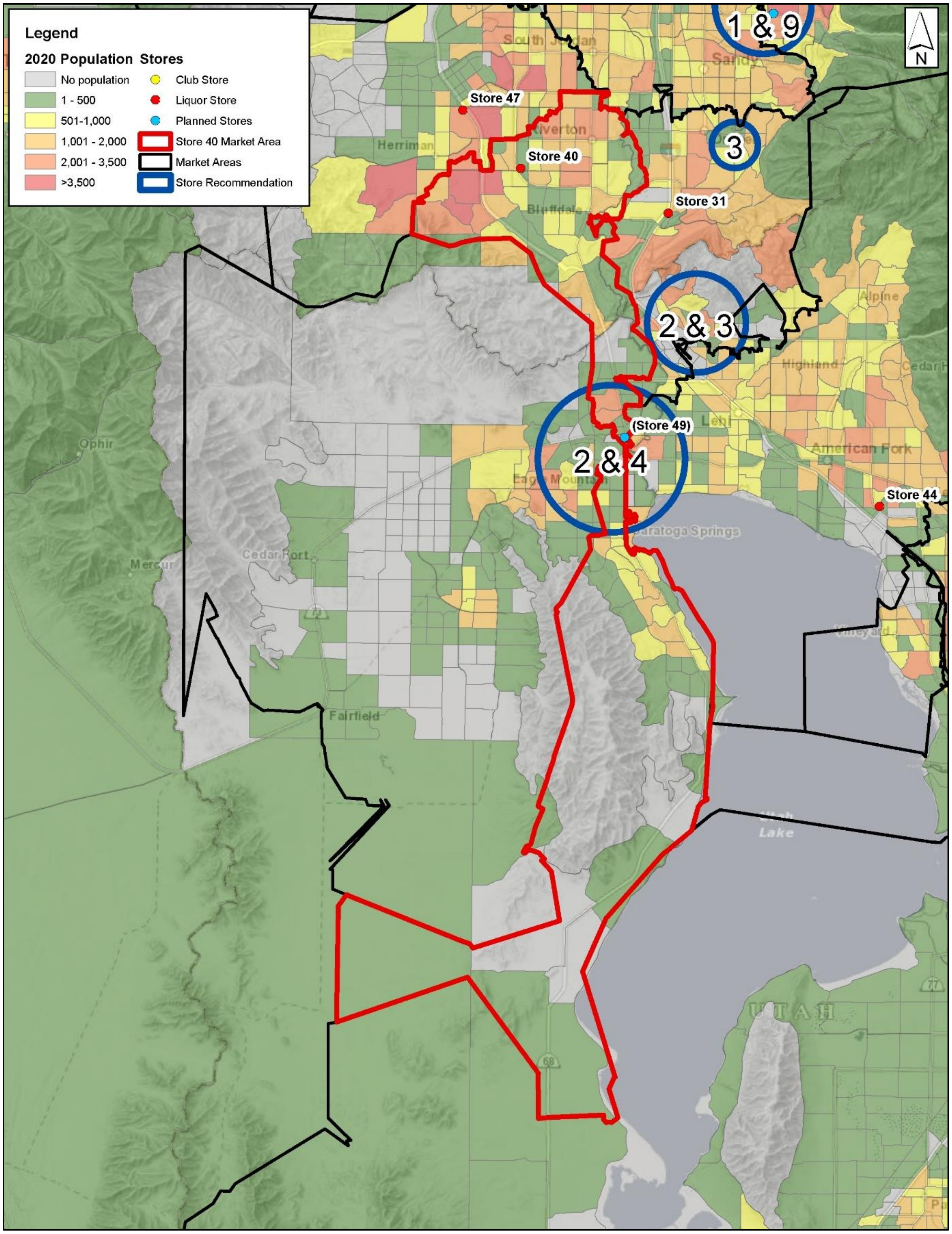


Priority 4: Store 40 – Riverton

The southwest area of Salt Lake County and the area west of Utah Lake are expected to see some of the largest overall growth in the state through 2030. The planned store in the Saratoga Springs (Store 49) area is expected to be completed by November 2020. This planned store also has the potential to assist the demand currently place on store 44 which is designated as the store with the second highest priority.

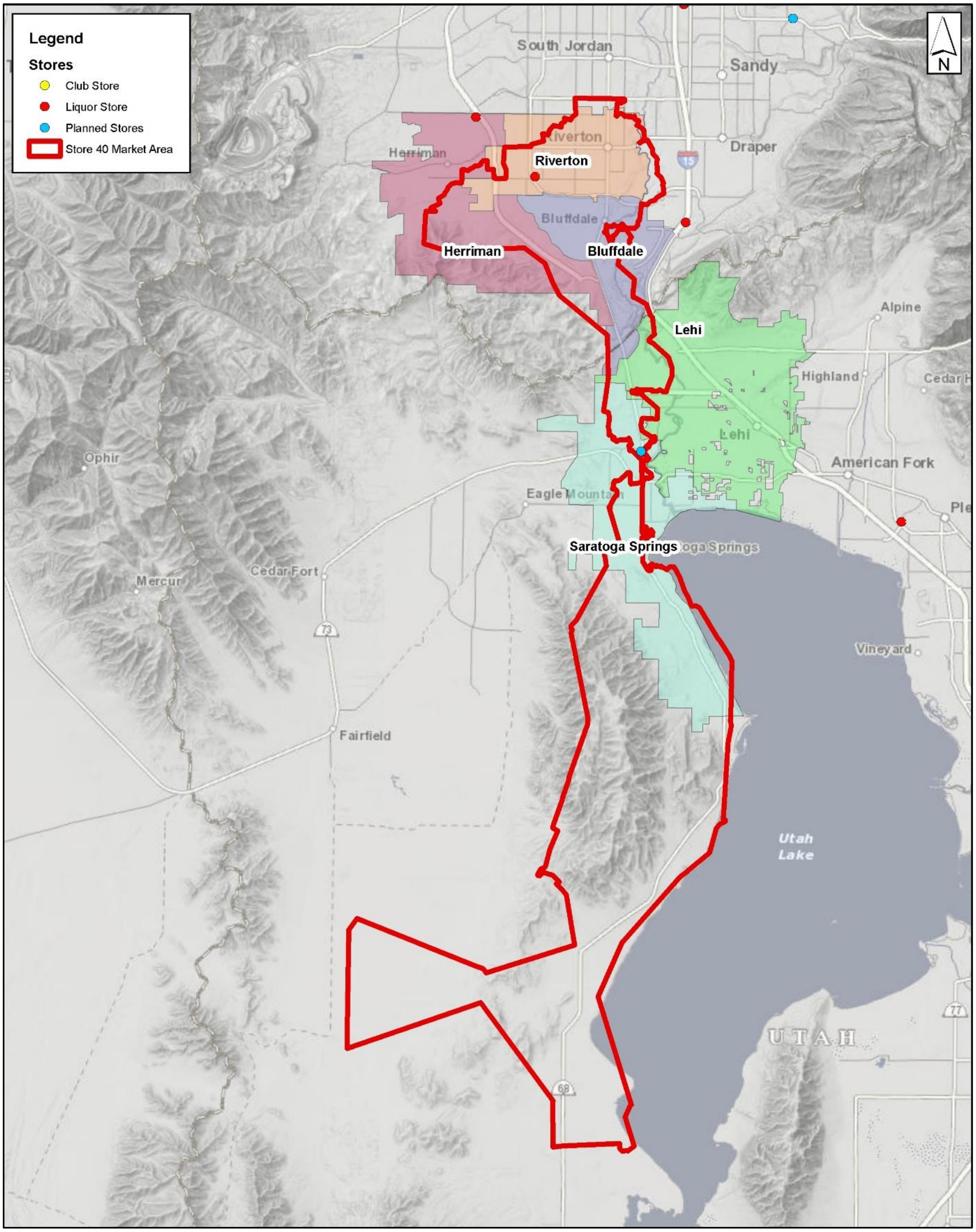


Most of the area's current population is located in and around Riverton and Herriman. The new store in Saratoga Springs (Store 49) will help reduce the demand from the southern portion of the market area.



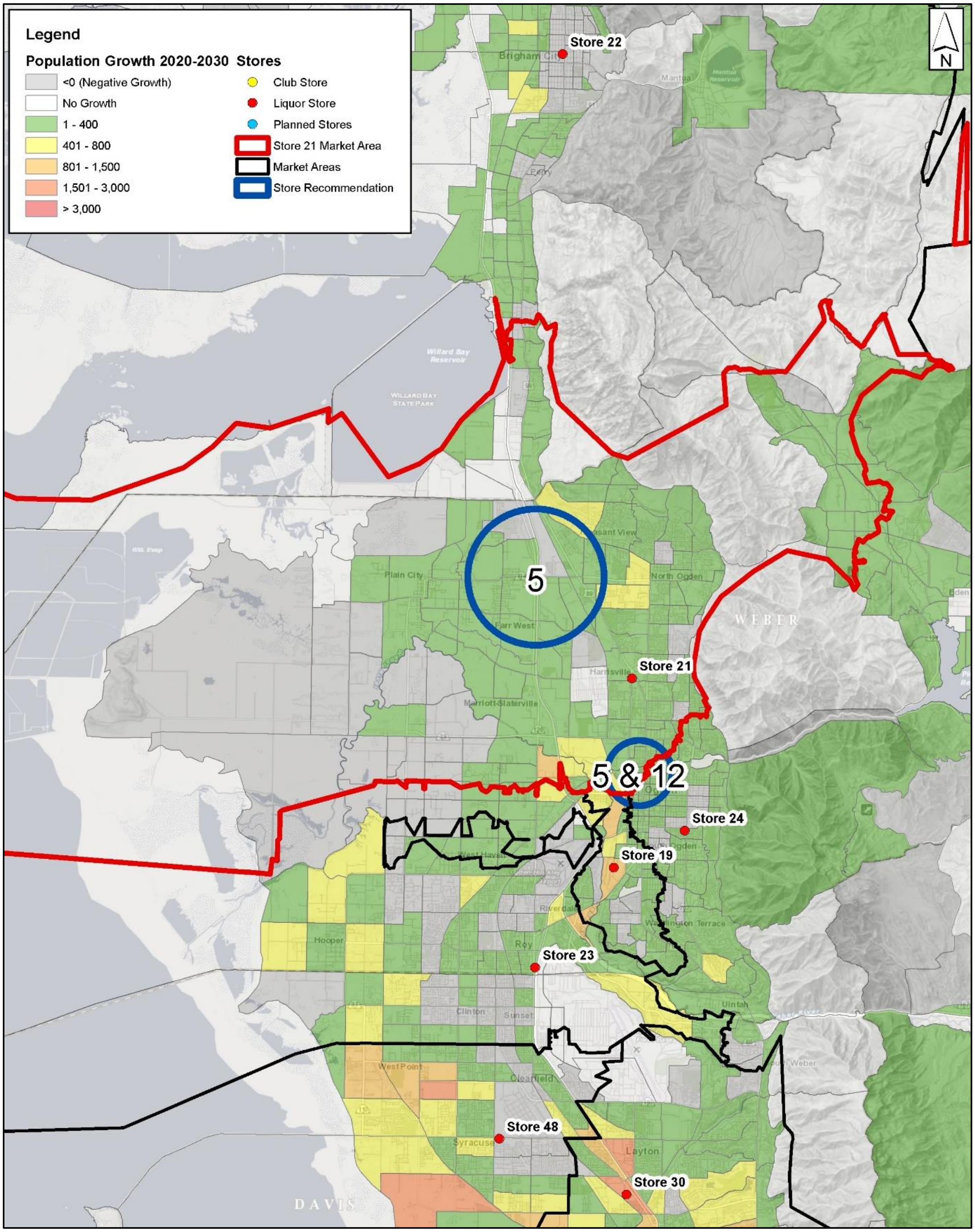
Municipalities located in this market area include:

- Riverton
- Herriman
- Bluffdale
- Saratoga Springs
- Lehi

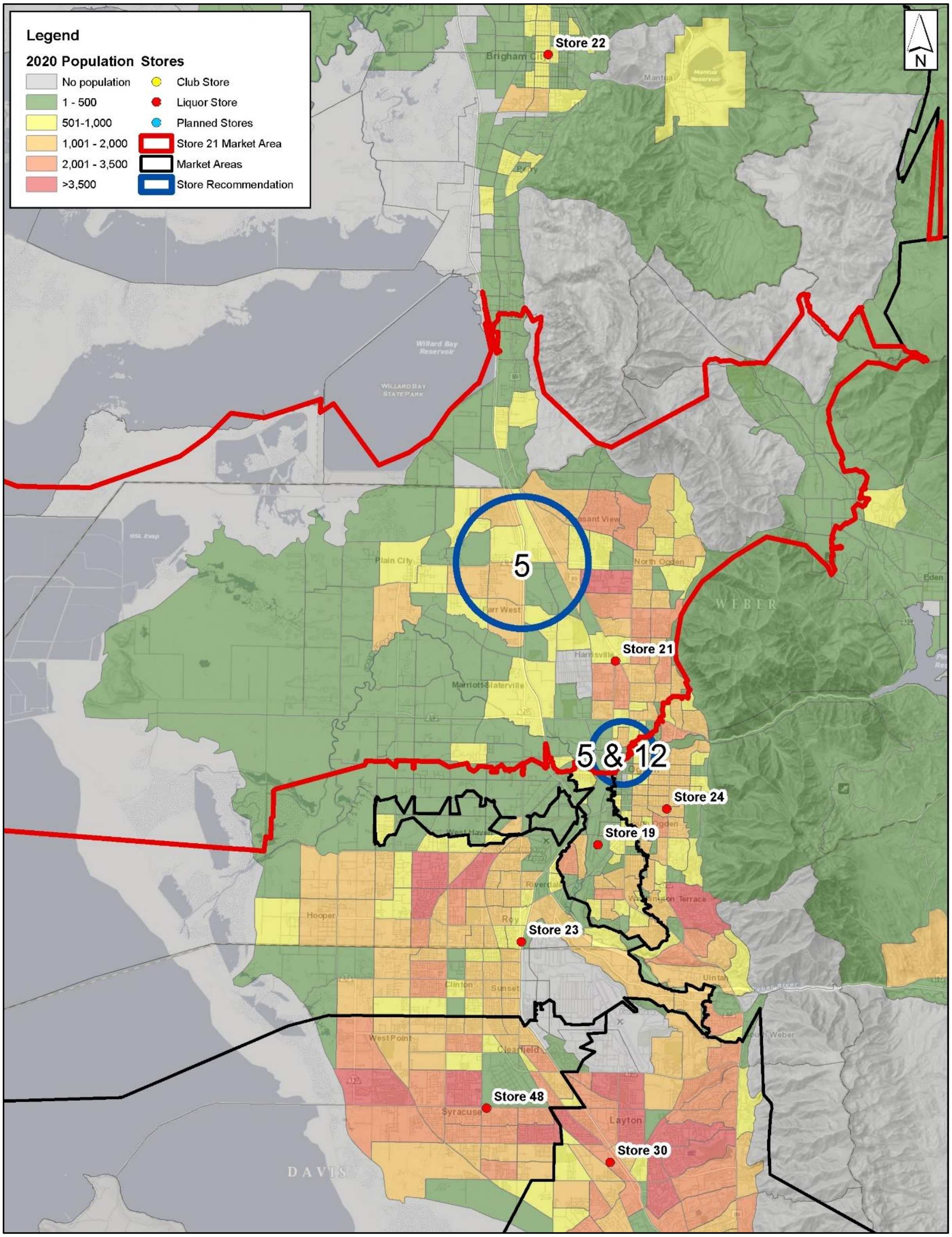


Priority 5: Store 21 – Harrisville

A location in Farr West or North Ogden could help Store 21 meet the demand that could stem from the growth projected in the northern Weber County area. Placing an additional store in Ogden could also have the potential to serve both the Harrisville and the Ogden store which is ranked as 12th in priority.

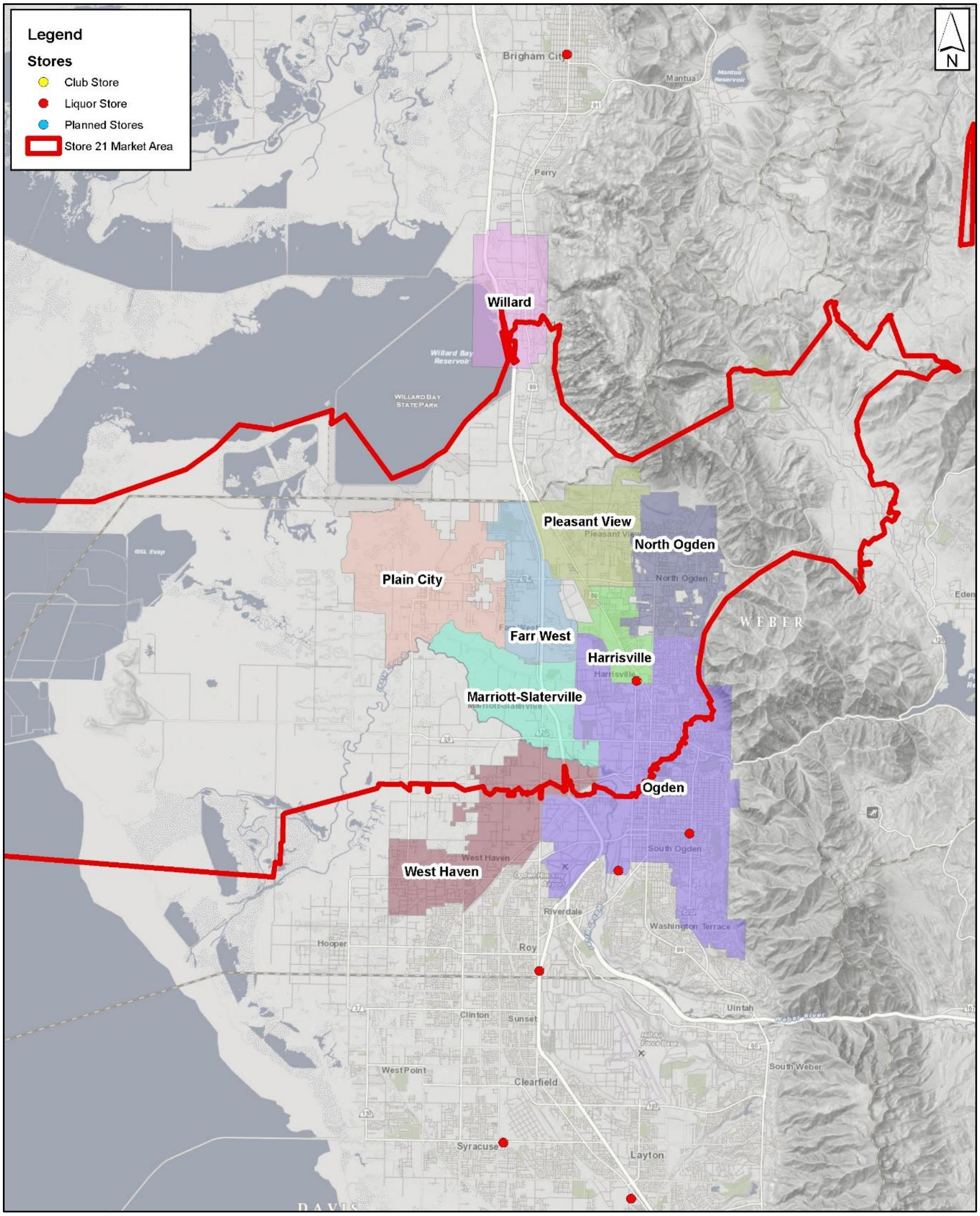


The current population also shows demand for another store in the Farr West and Pleasant View area. The map below shows the current estimated population and shows a substantial population that could benefit from an additional store.



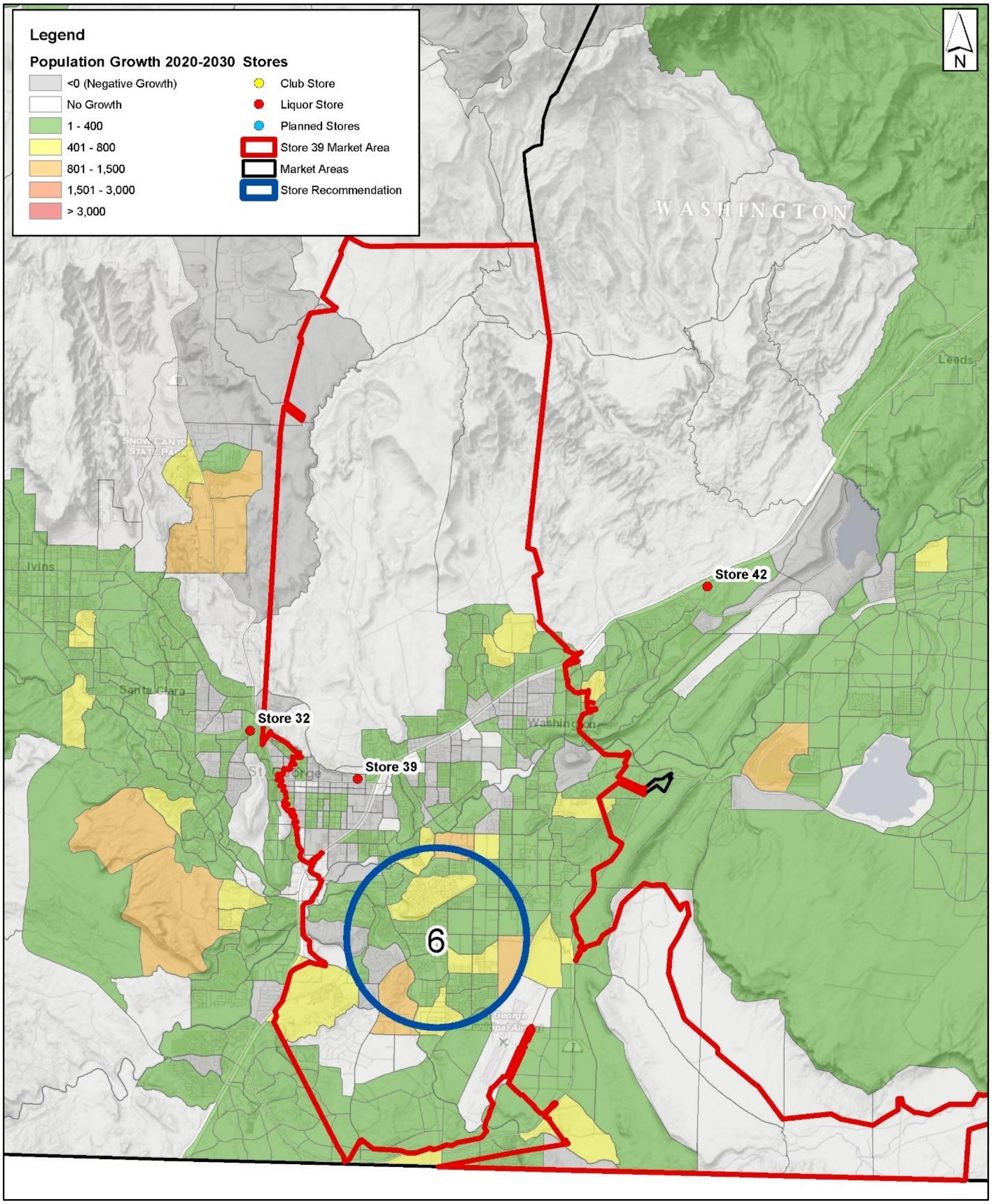
Municipalities located in these market areas include:

- Willard
- Plain City
- Farr West
- Pleasant View
- North Ogden
- Harrisville
- Marriott-Slaterville
- Ogden
- West Haven

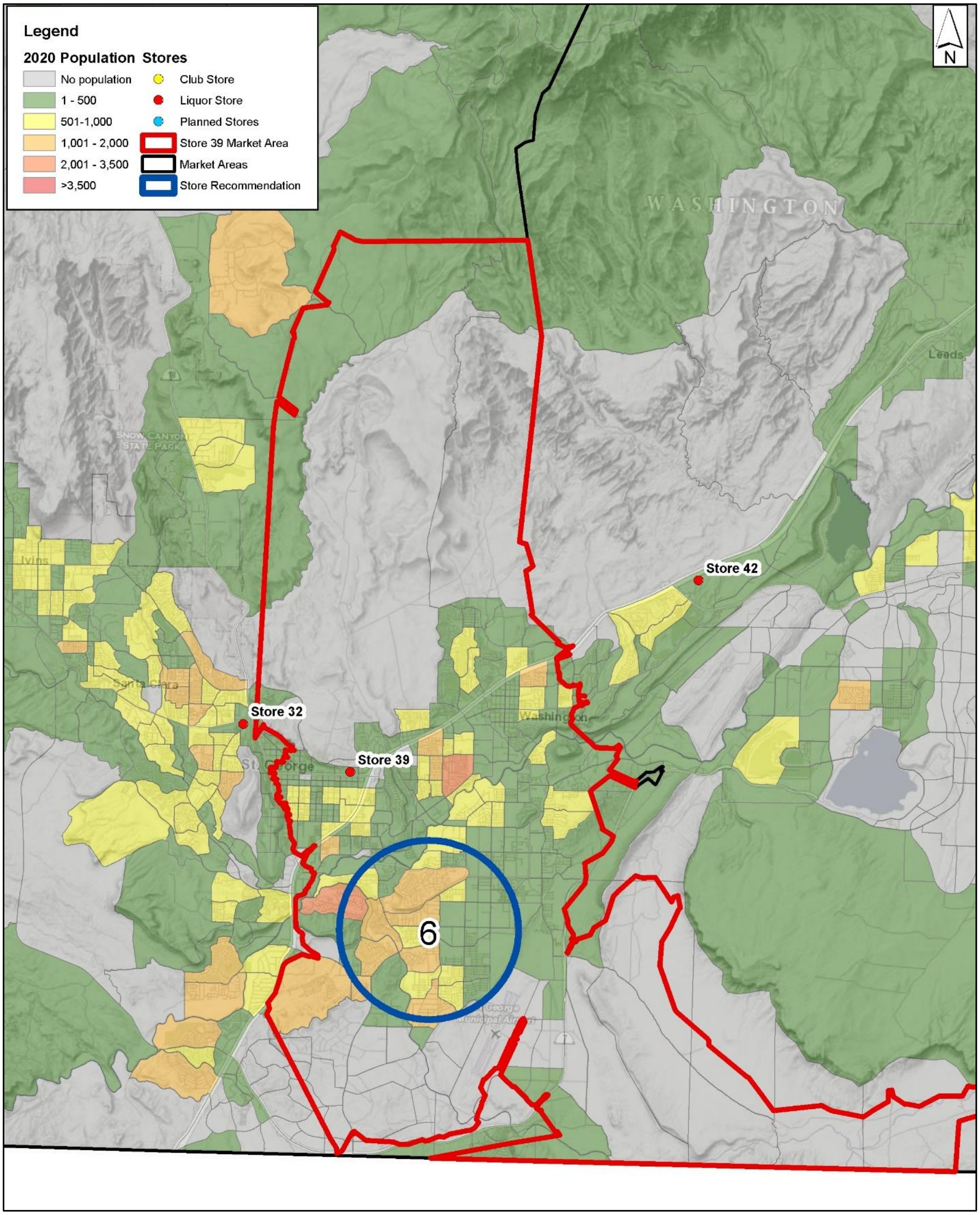


Priority 6: Store 39 – St. George

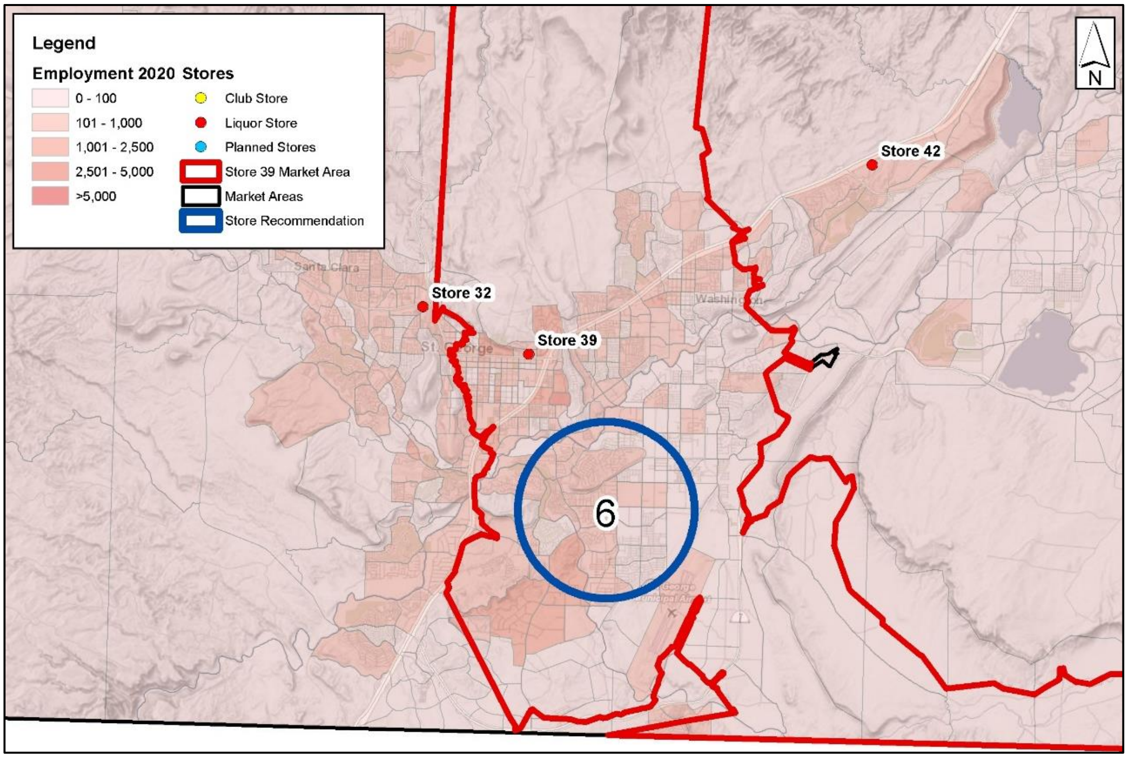
The southeastern St. George area is projected to have significant growth by the year 2030. Store 39 ranked 7th in Population Growth 2020-2030 and 6th in Bottles Sold per Man Hour. This indicates high demand in the area. A significant amount of the St. George growth is projected to happen to the southeast of the city. A store in this area would help meet growing demand.

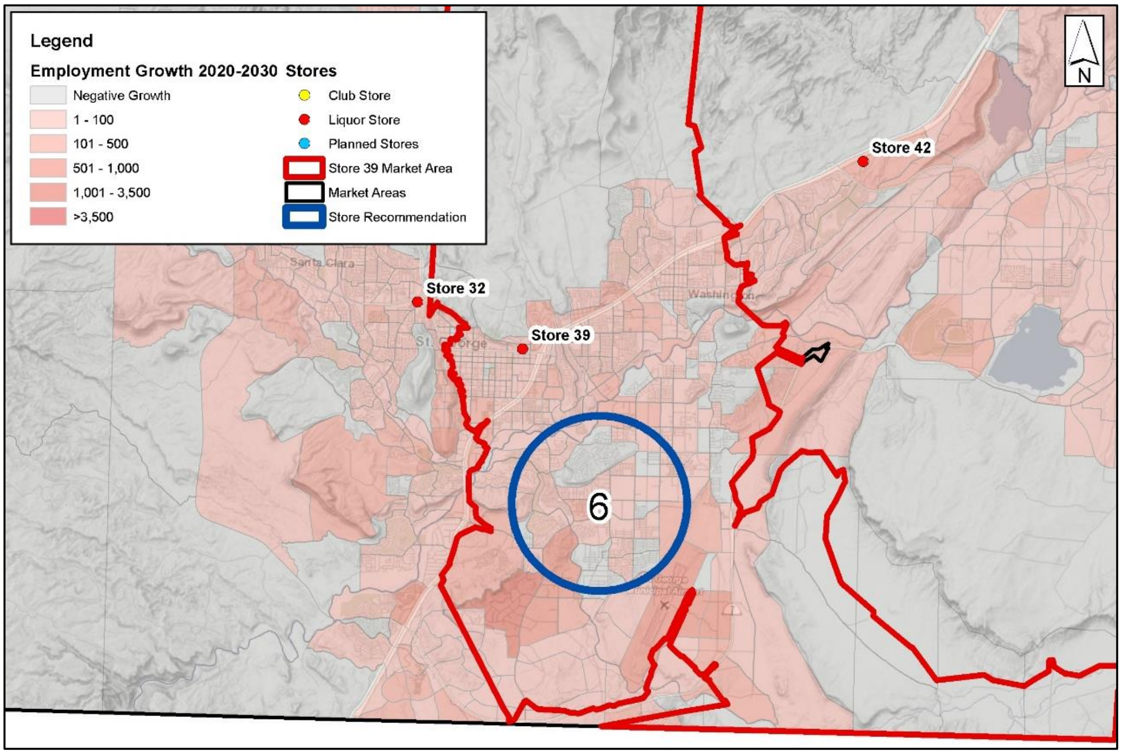


The following map shows the current estimates of population in the St. George area. It indicates that the growth noted above will add upon an already established population in area southeast of St. George. This further shows a store in this area could help meet current and future demand.



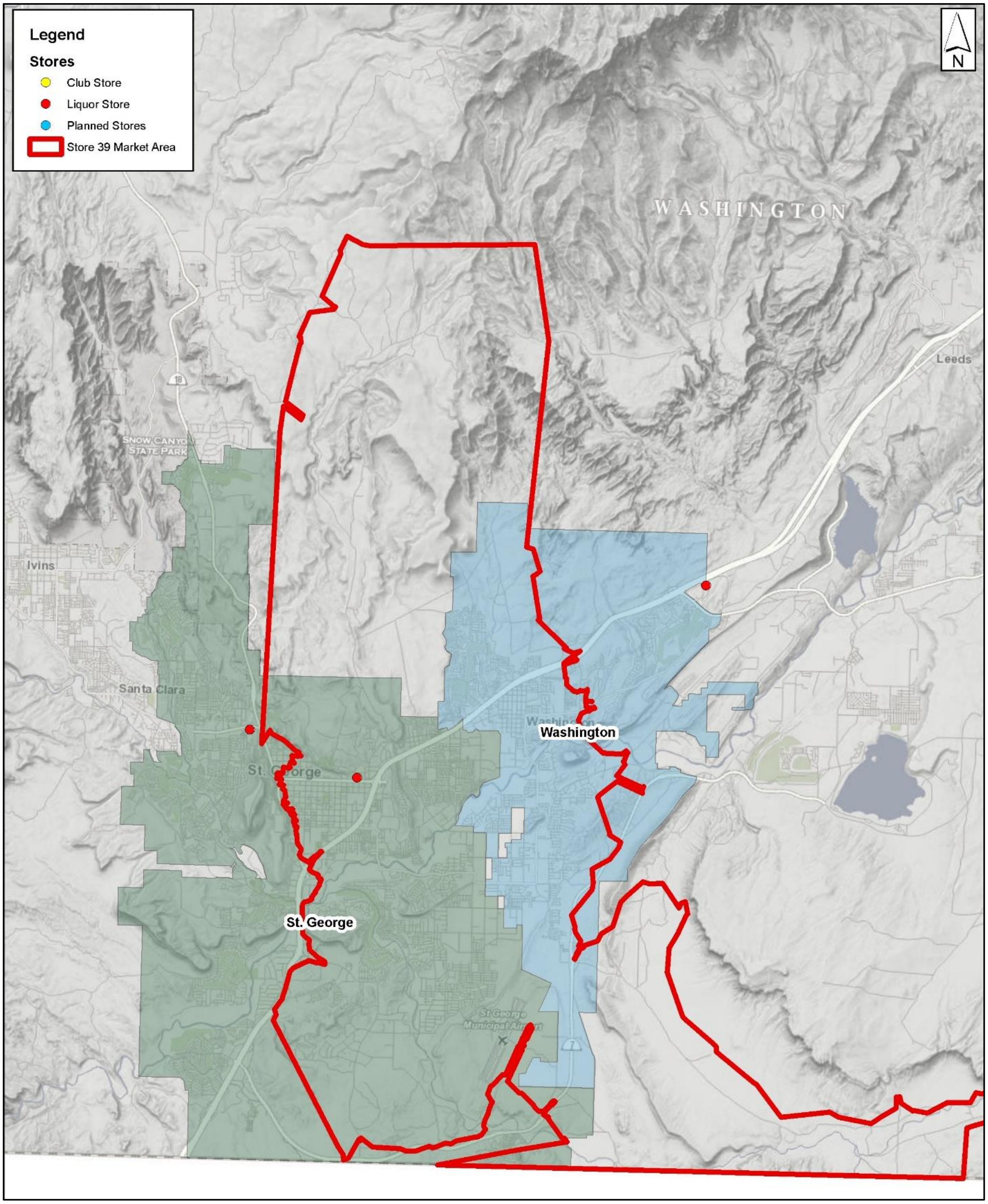
The maps below show the current and future growth of employees located in the St. George region. There is an employment center south of St. George which is estimated to have about 4,500 employees. This area is expected to grow by about 3,000 employees by 2030. A store in the recommended area would help meet increased demand from the increased number of employees.





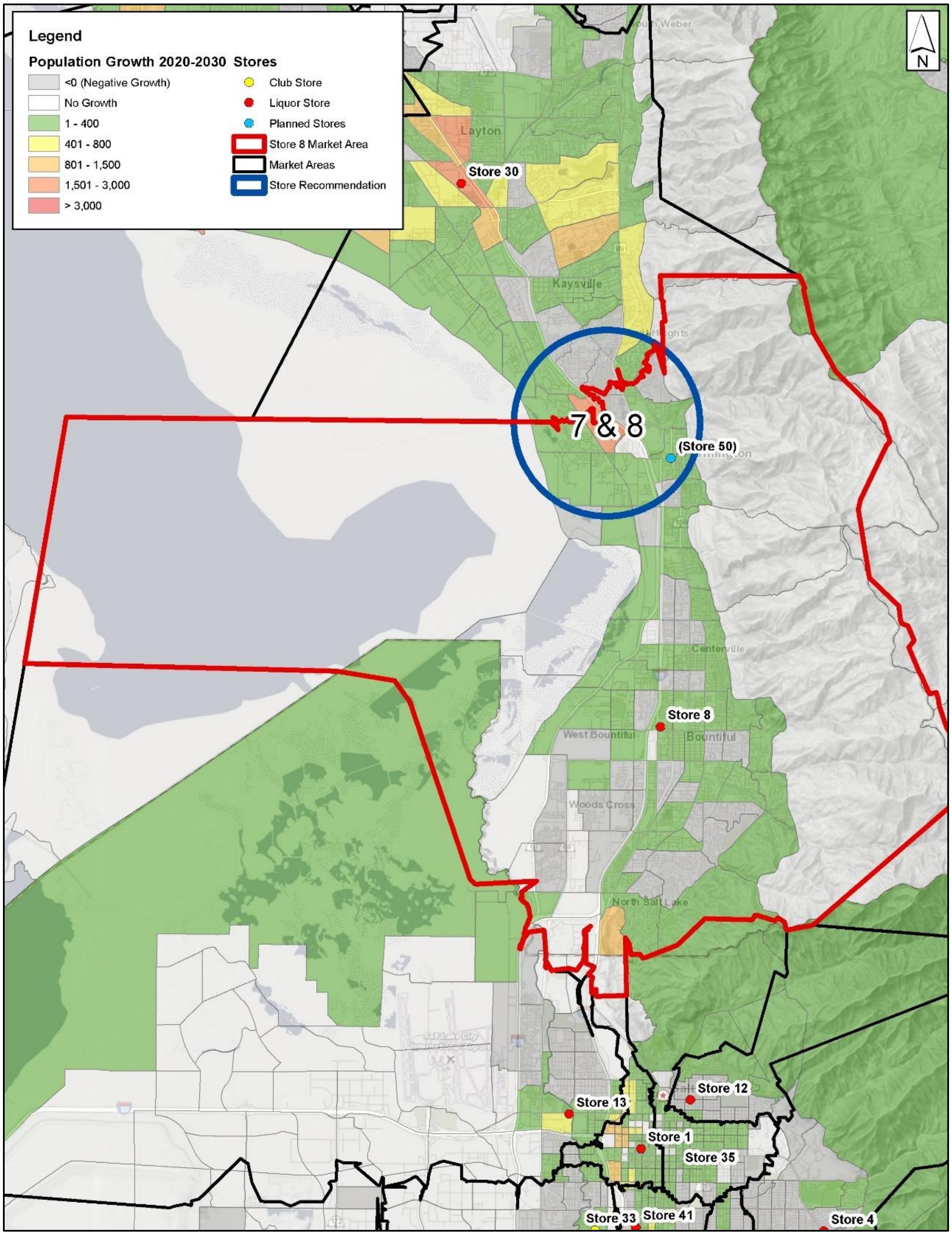
Municipalities located in this market area include:

- Washington
- St. George

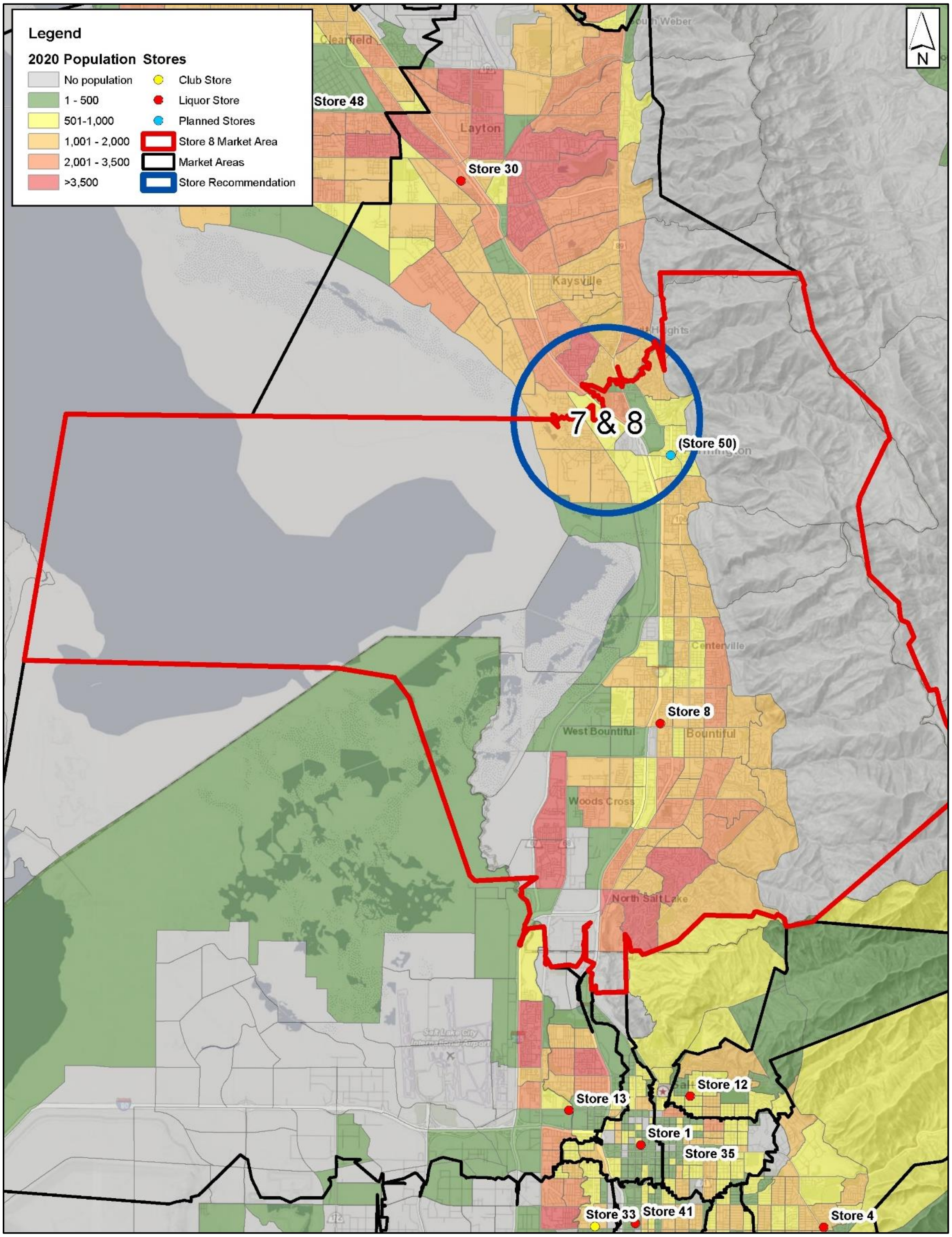


Priority 7: Store 8 – Bountiful

Store 8 has the 6th largest population as of 2020 according to TAZ population projections. A Farmington Store (Store 50) has been planned and is anticipated to be completed in 2020. Farmington has a large population and is almost completely in the Store 8 market area. It is expected that this new store will help meet current and future demand. The following map also shows that growth is expected to continue over the next 10 years.

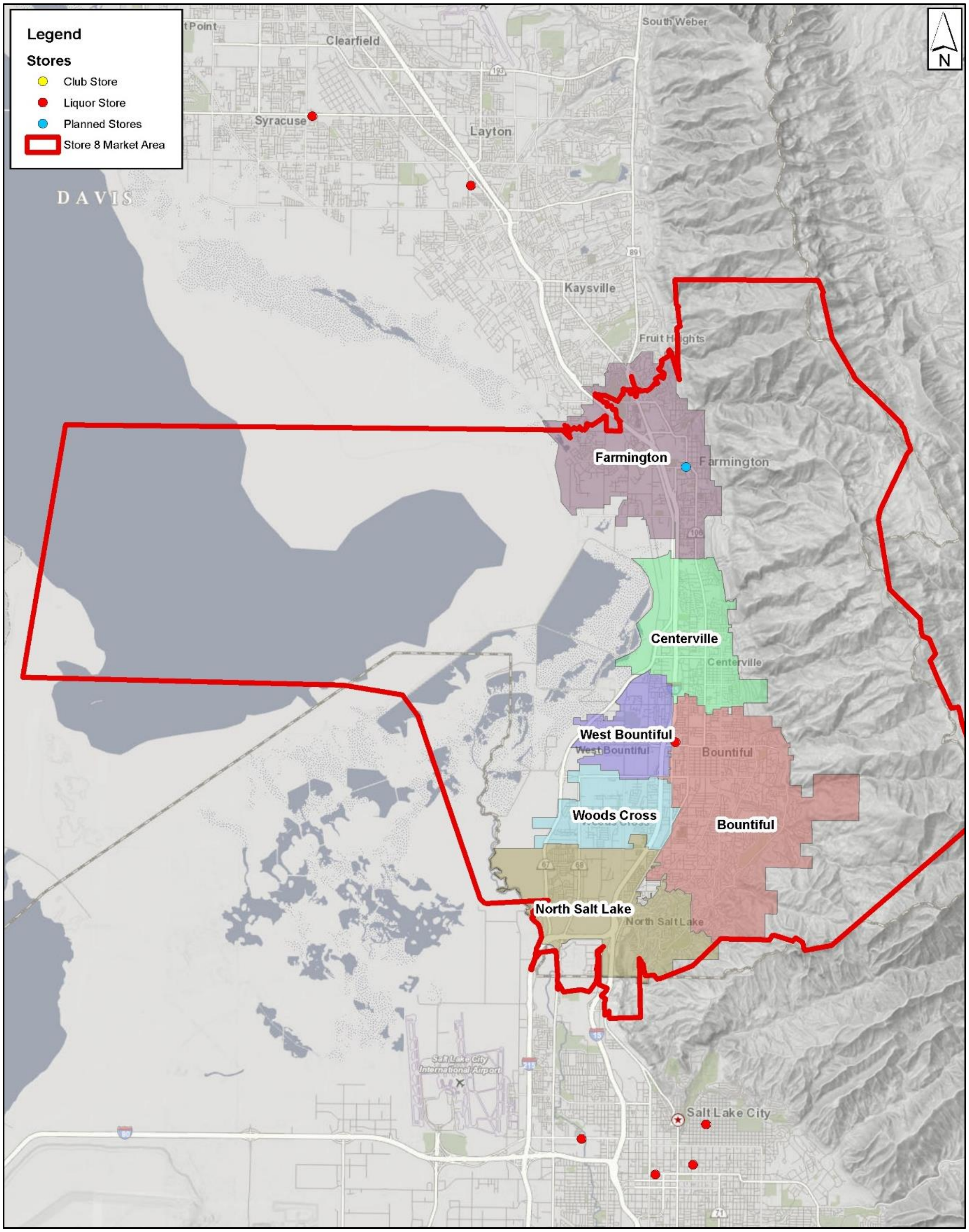


The map below shows the current population projections for 2020. The area directly around store 50 will meet the current demand created by the population in the direct area and will help reduce the demand placed Store 8.



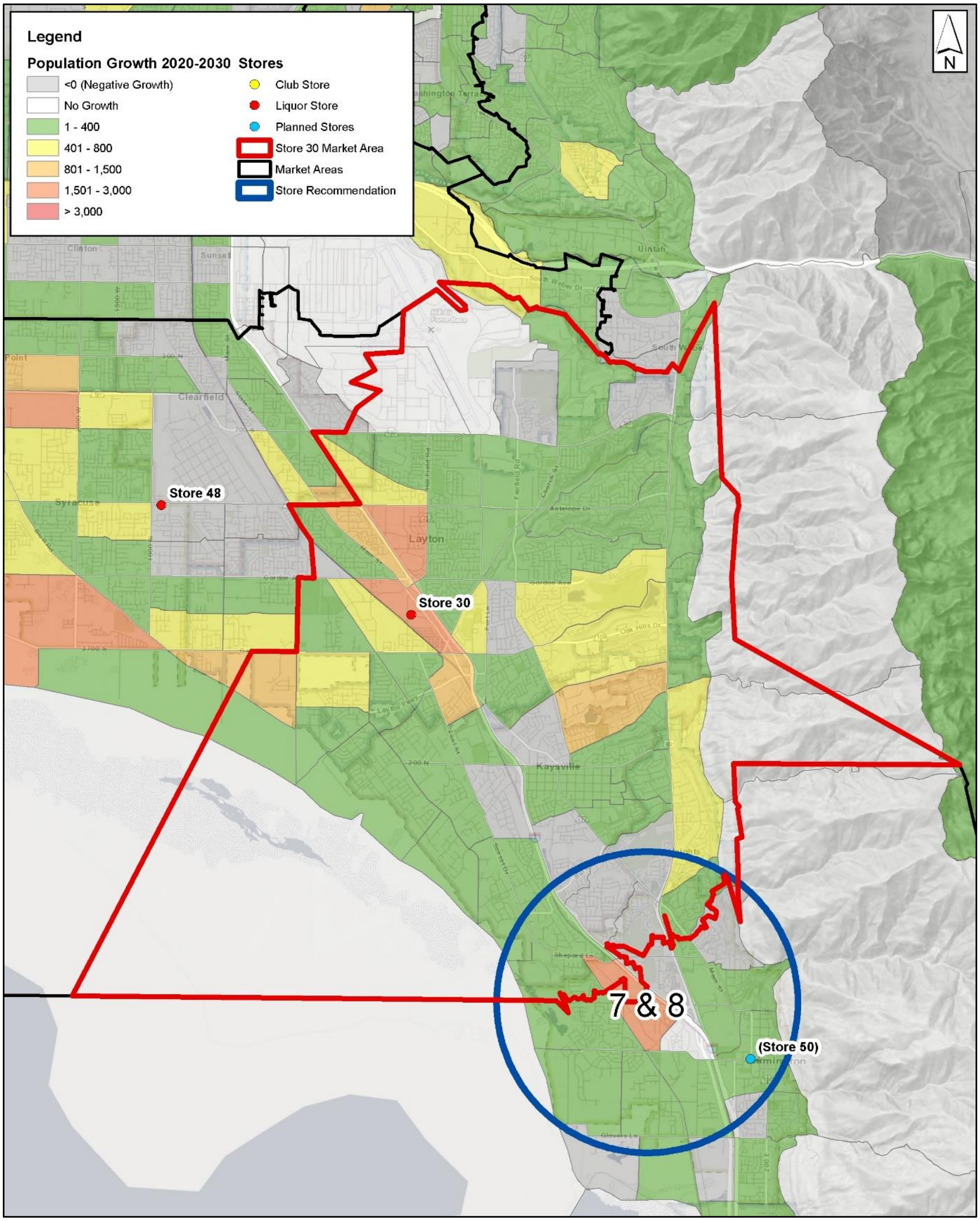
Municipalities located in this market area include:

- Farmington
- Centerville
- West Bountiful
- Bountiful
- Woods Cross
- North Salt Lake

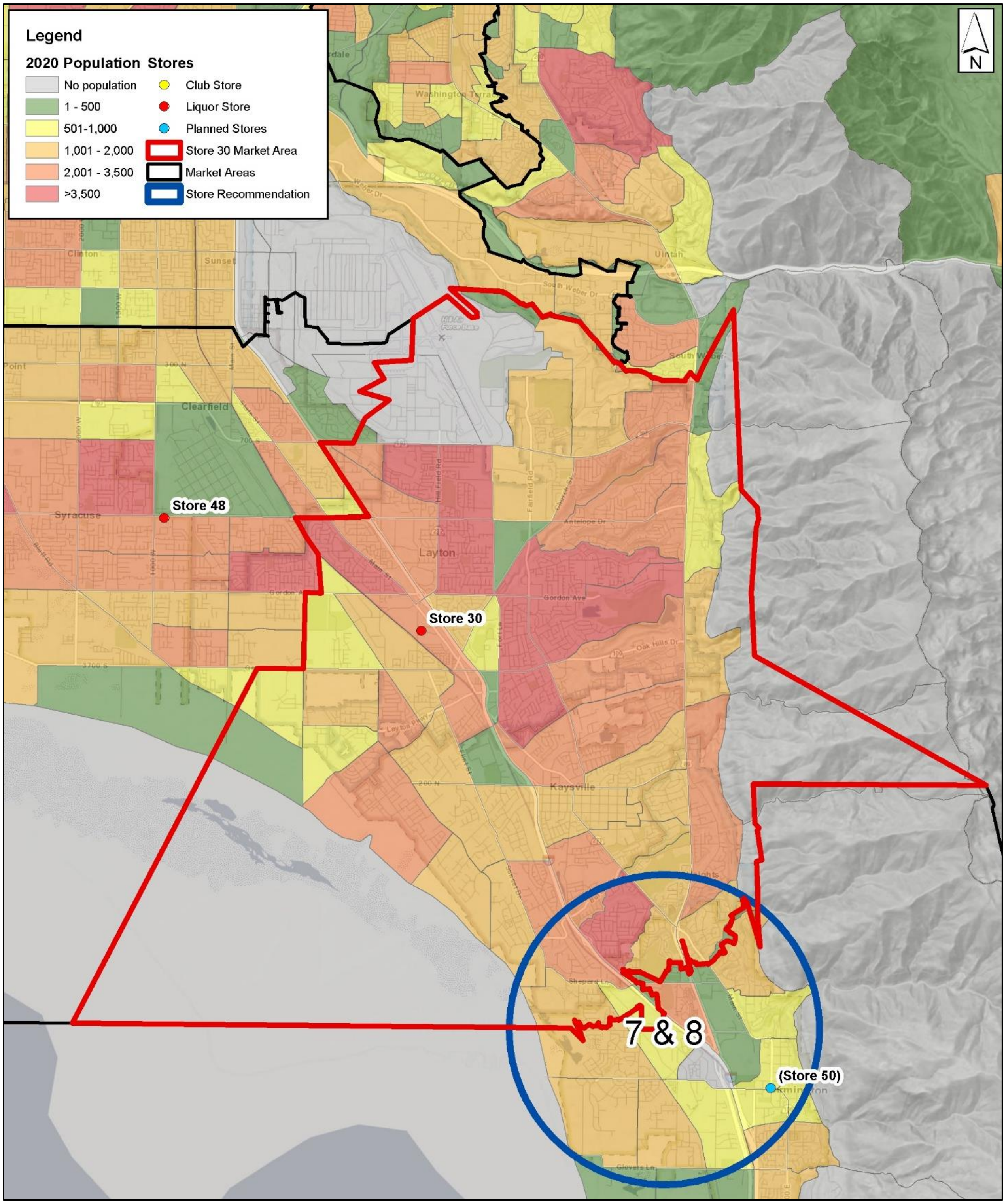


Priority 8: Store 30 – Layton

Store 24 is projected to see significant growth in the area directly around the store. It ranks 5th in 2020 Population, 6th in 2030 Population, and 8th in Population Growth 2020-2030. The planned Farmington store (Store 50) is anticipated to be completed in November 2020 and will help reduce the heavy demand placed on Store 24 by its current and growing population.

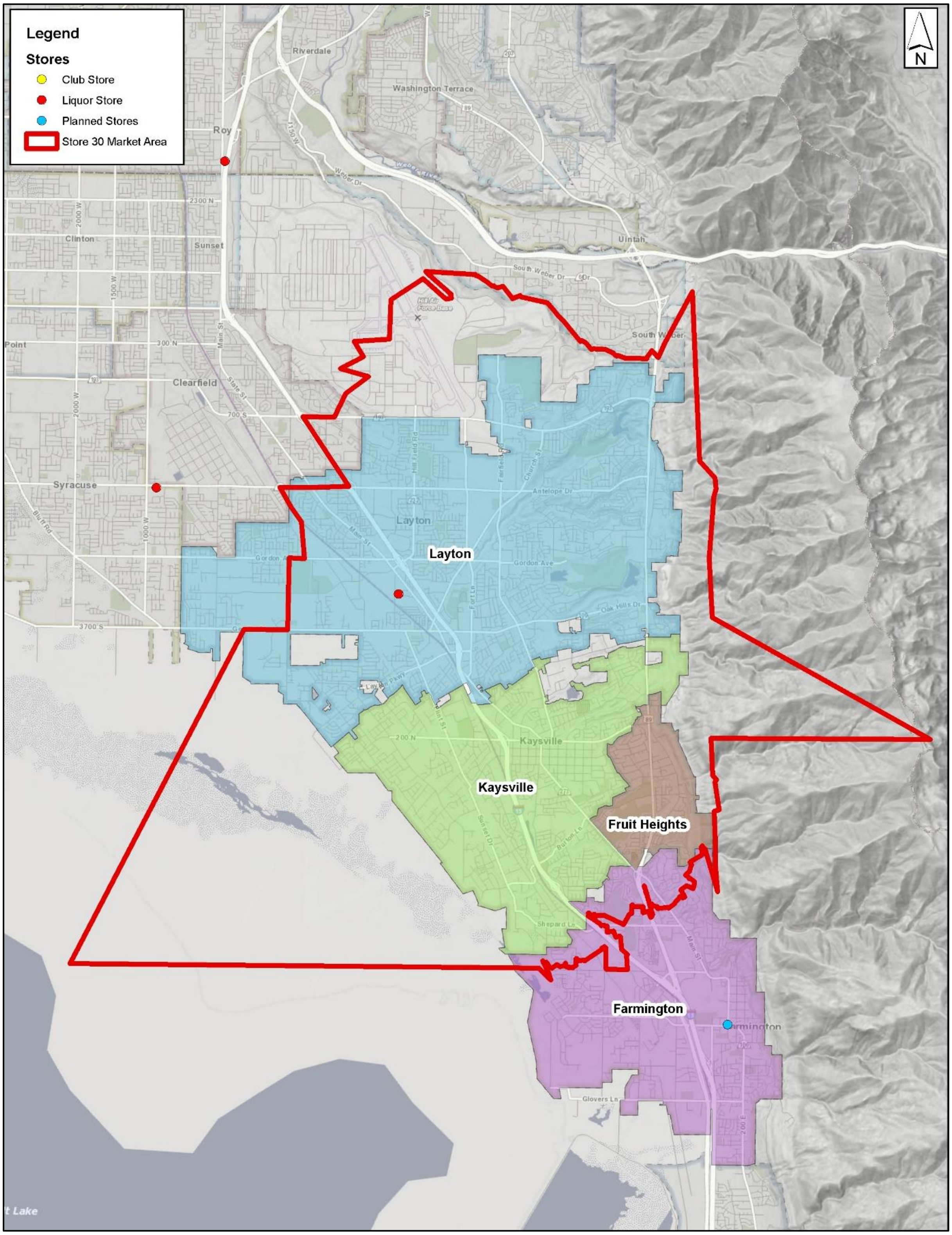


The map below shows the current population around Store 30 in Layton. It shows that there is already a large population directly surrounding the store which is anticipated to increase substantially over the next ten years. This further shows how impactful the planned store in Farmington will be in helping meet the current and future demand in Store 30's market area.



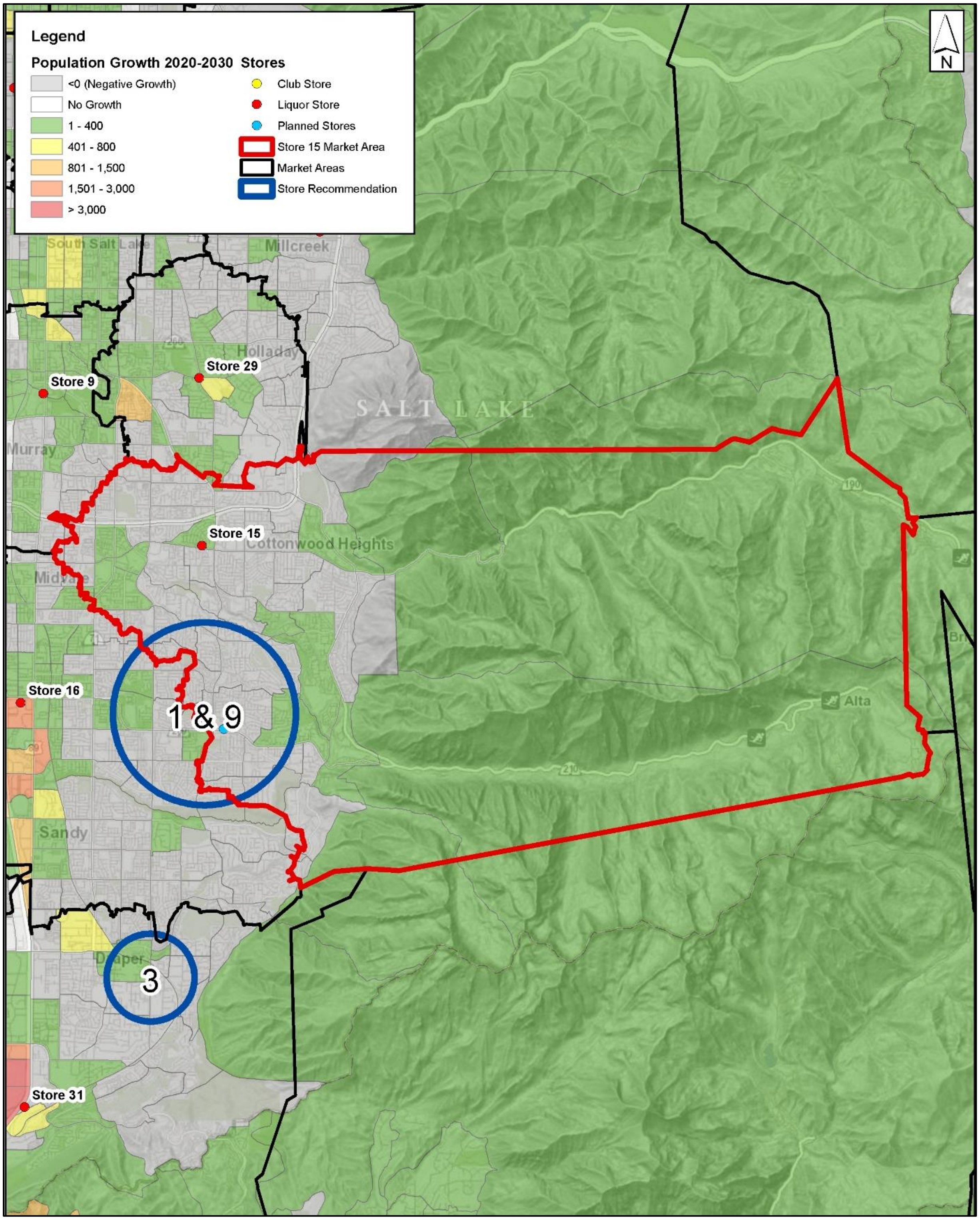
Municipalities located in this market area include:

- Layton
- Kaysville
- Fruit Heights
- Farmington

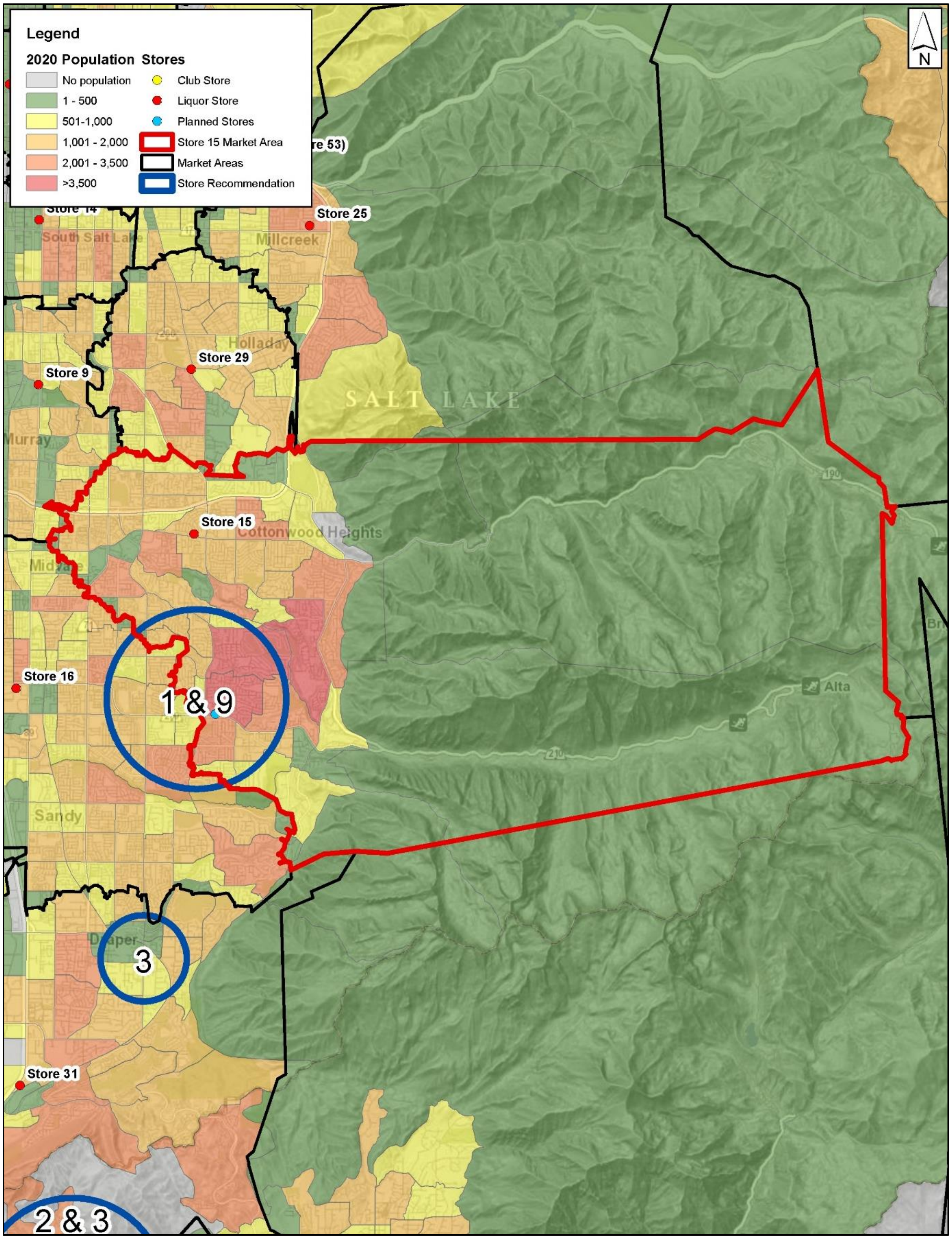


Priority 9: Store 15 – Cottonwood Heights

Store 15 in Cottonwood Heights ranks high in both Bottles per Man Hours and Transactions per Capita. Store 52 is planned to be constructed by 2022 in east Sandy and will help meet the demand in Cottonwood Heights. This new store will also serve one of the larger communities in the Salt Lake Valley.

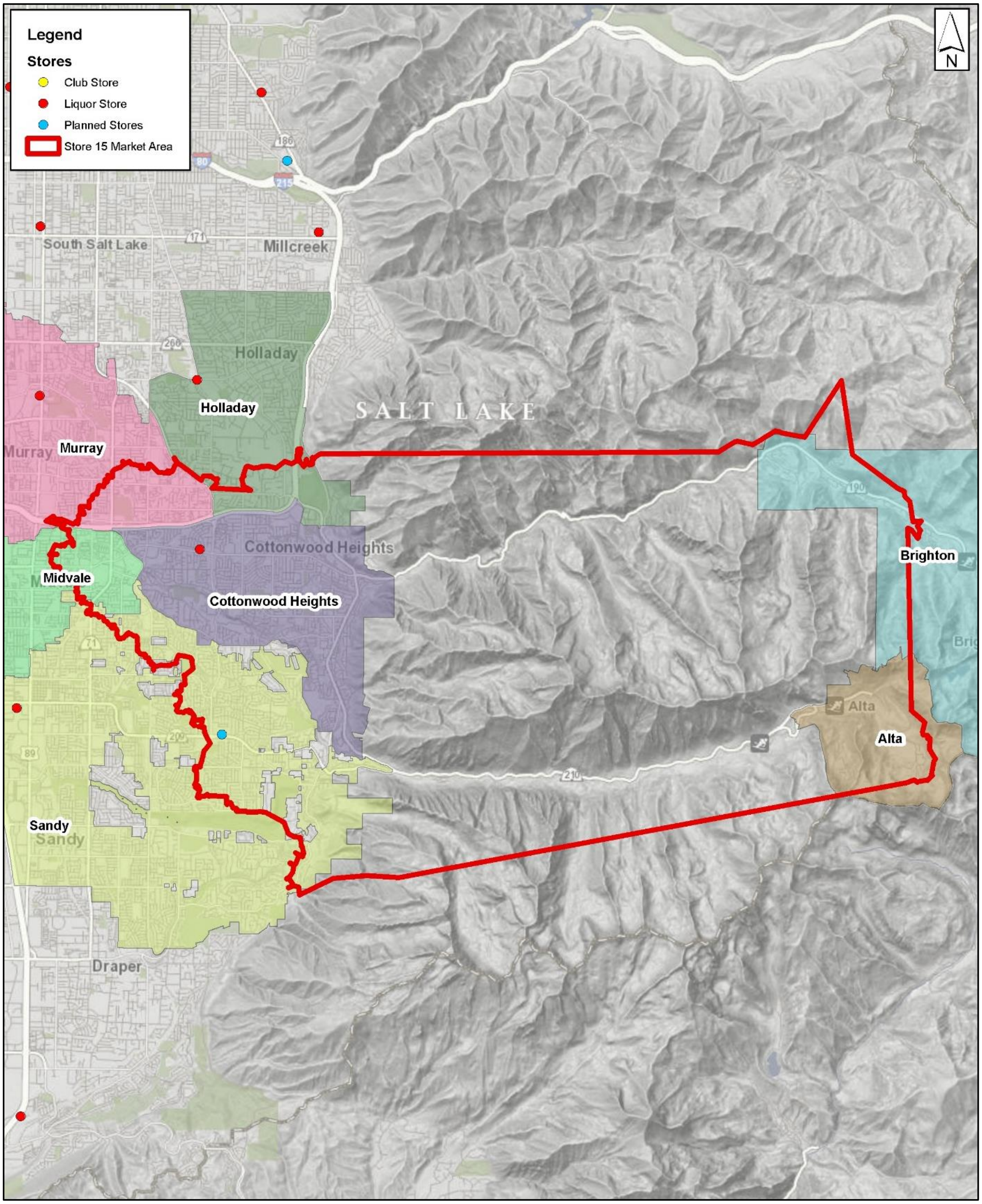


As shown in the map below. Store 15 currently serves a large population in a generally small area. The Wasatch Mountain Range makes most of the market area undevelopable, but the western section of the area is heavily populated. The planned store in east Sandy will help to serve this large population.



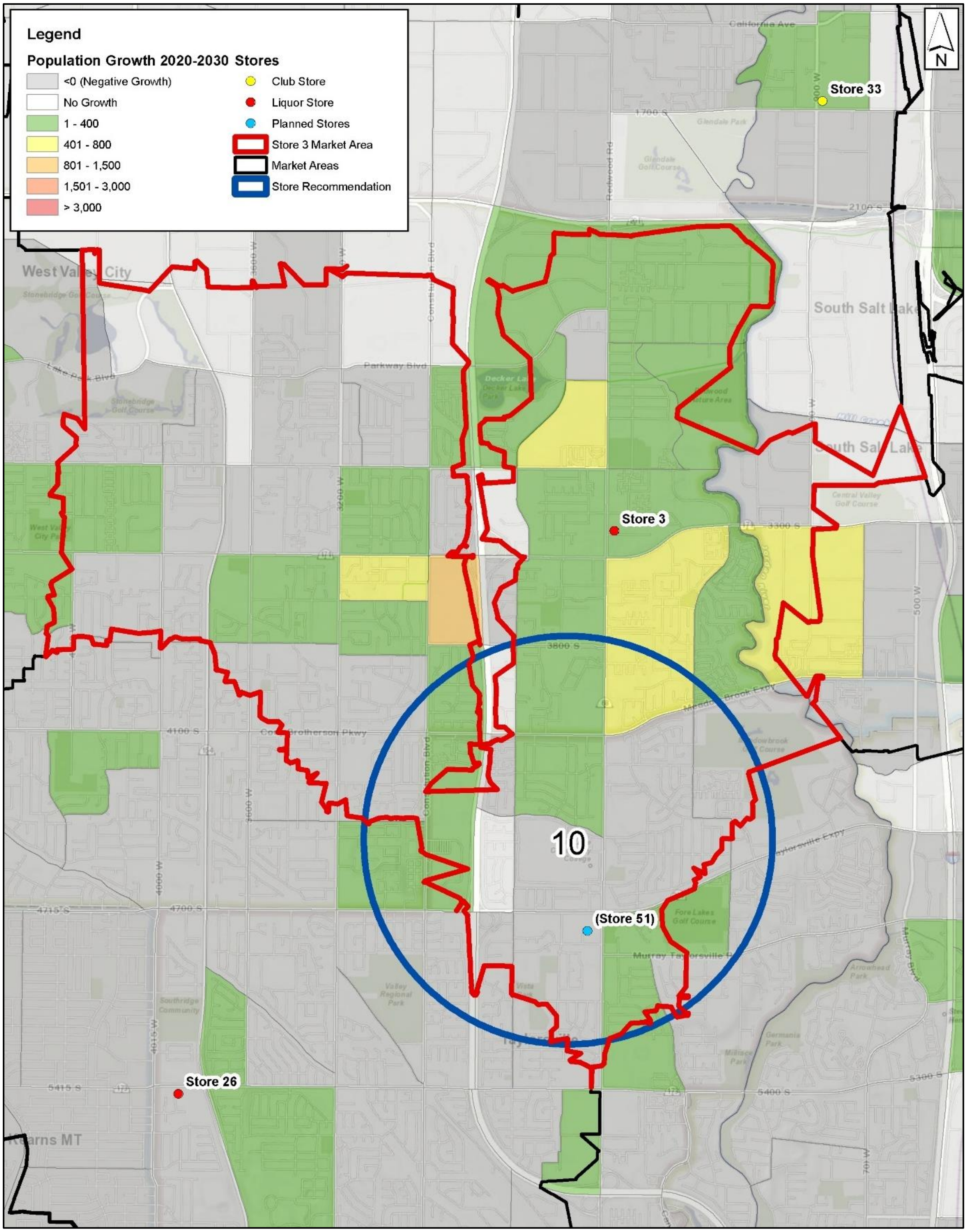
Municipalities located in this market area include:

- Cottonwood Heights
- Holladay
- Murray
- Midvale
- Sandy
- Alta
- Brighton

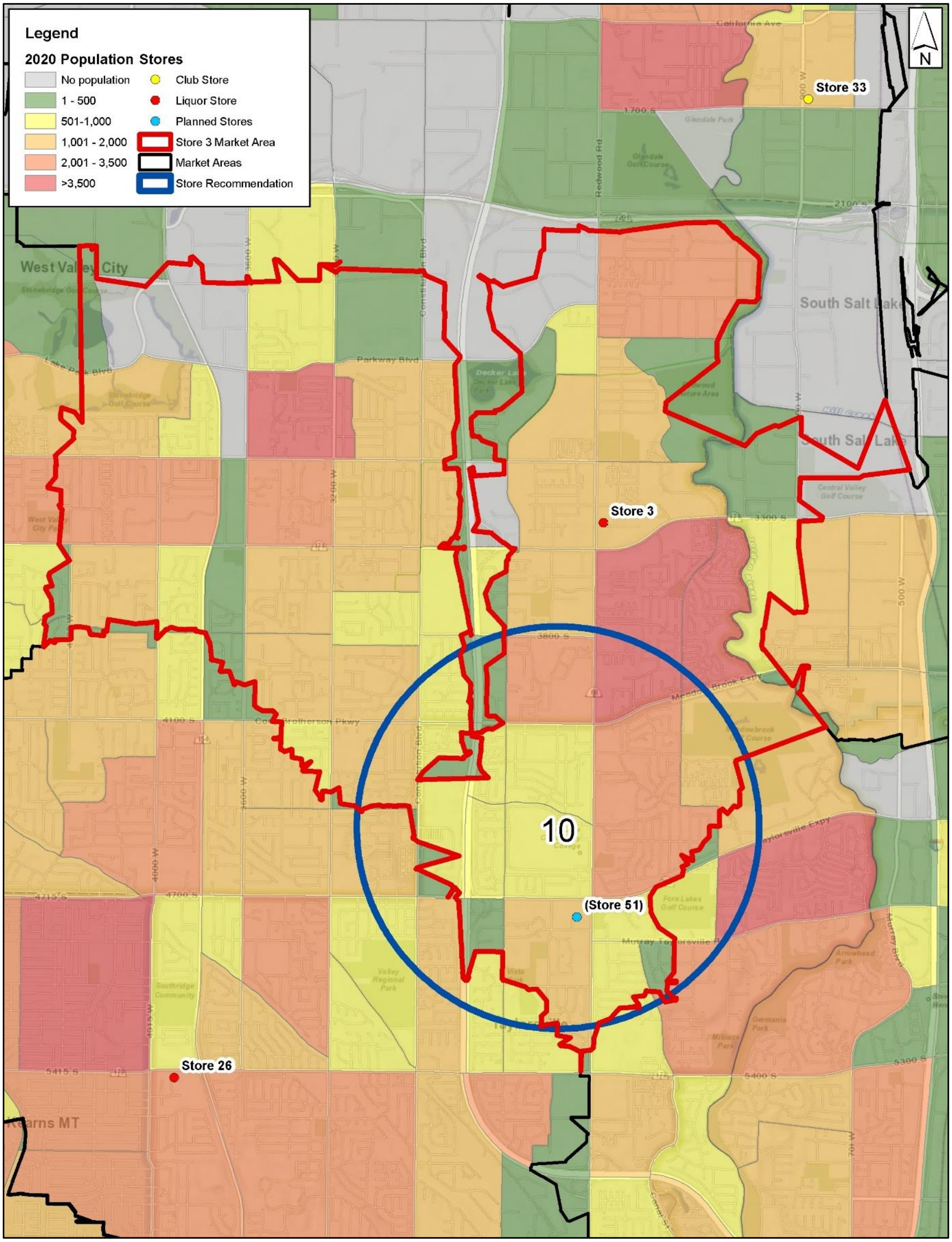


Priority 10: Store 3 – West Valley City

Store 3 has the 4th highest population density of all stores and is anticipated to see moderate growth in its immediate area as shown in the map below. This additional growth will add to an already dense population. A new store (Store 51) is anticipated to be built on Taylorsville in 2021.

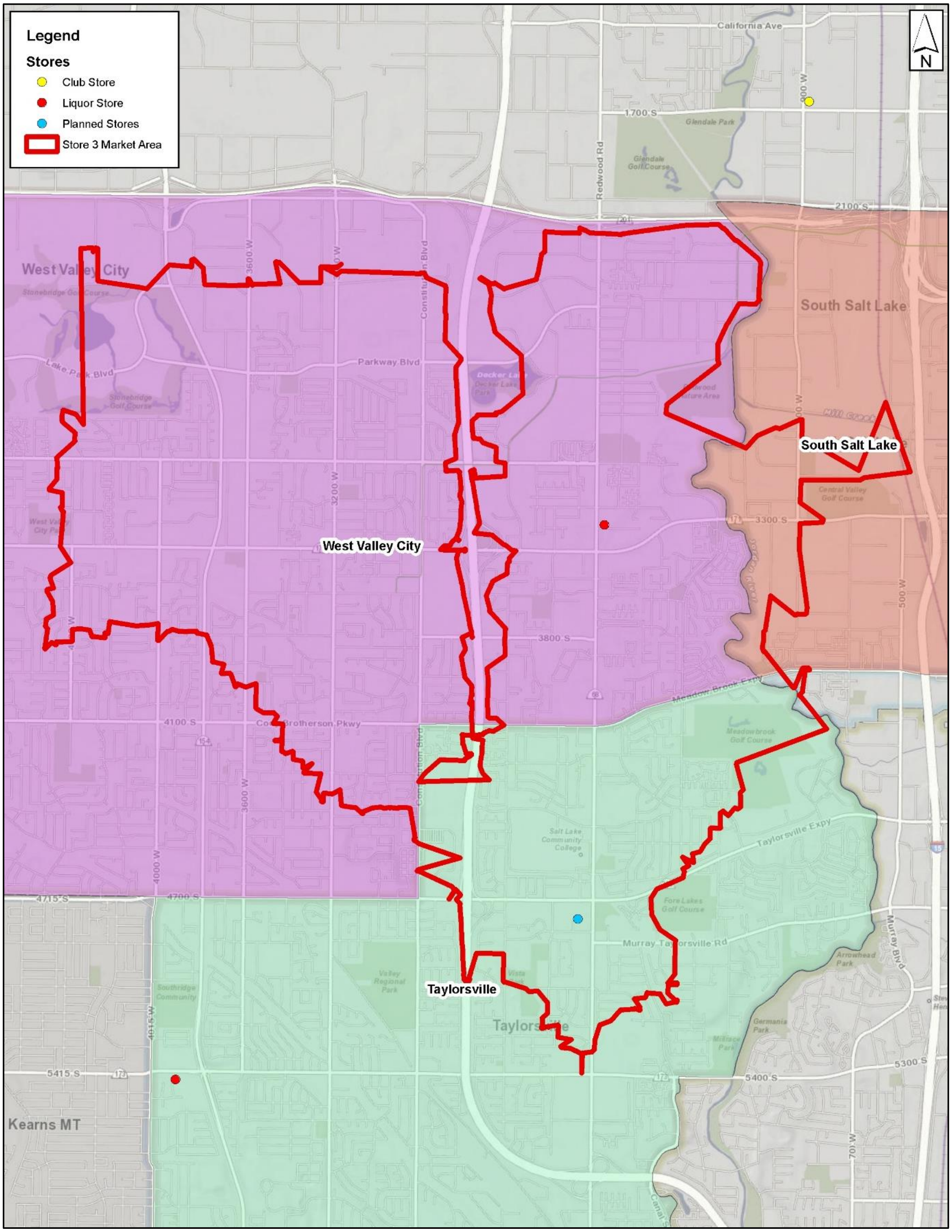


The map below shows the large population in and around the Store 3 Market area. The new store in Taylorsville will help Store 3 deal with the current demand and the future growth which is expected.



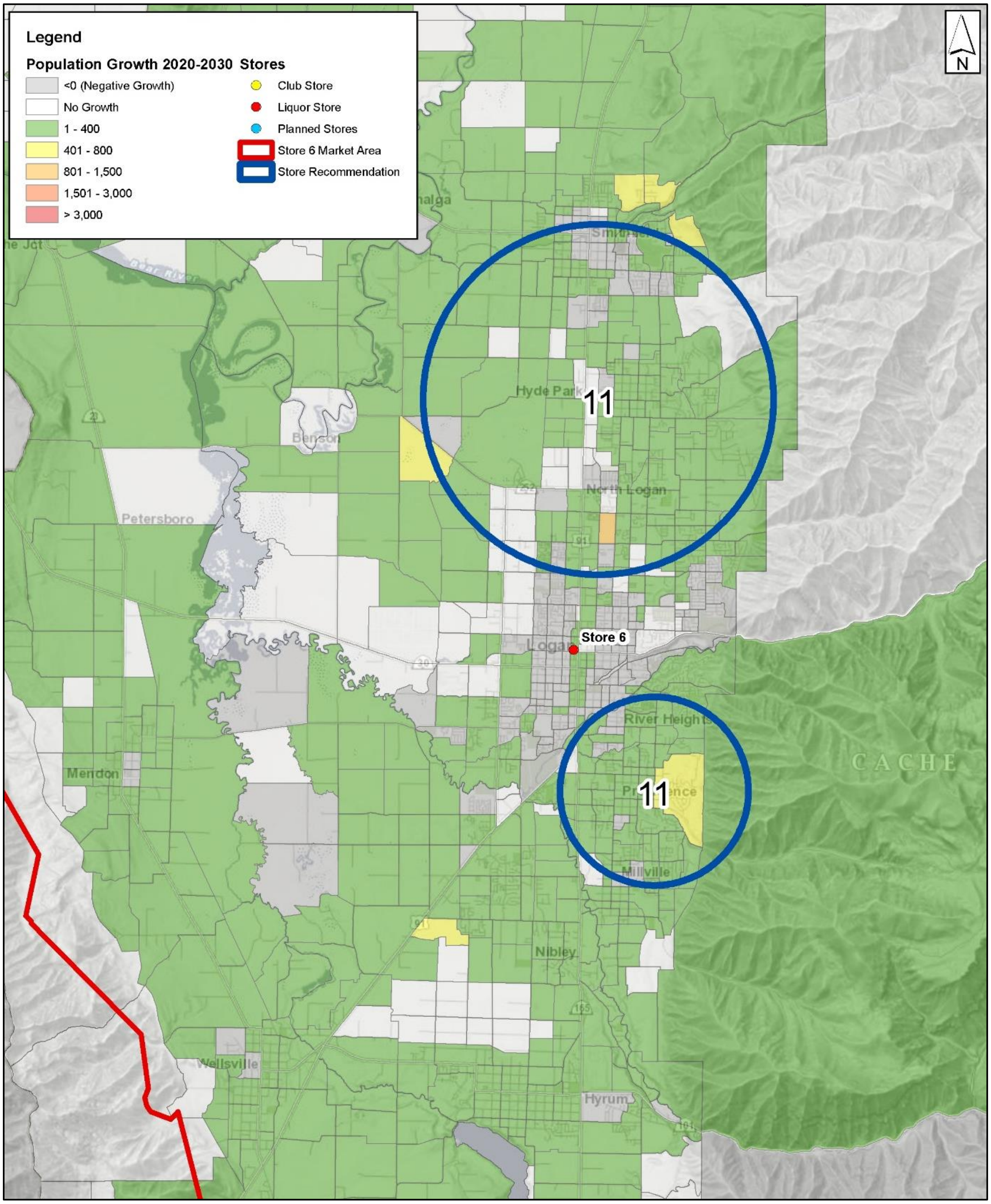
Municipalities located in this market area include:

- West Valley City
- Taylorsville
- South Salt Lake

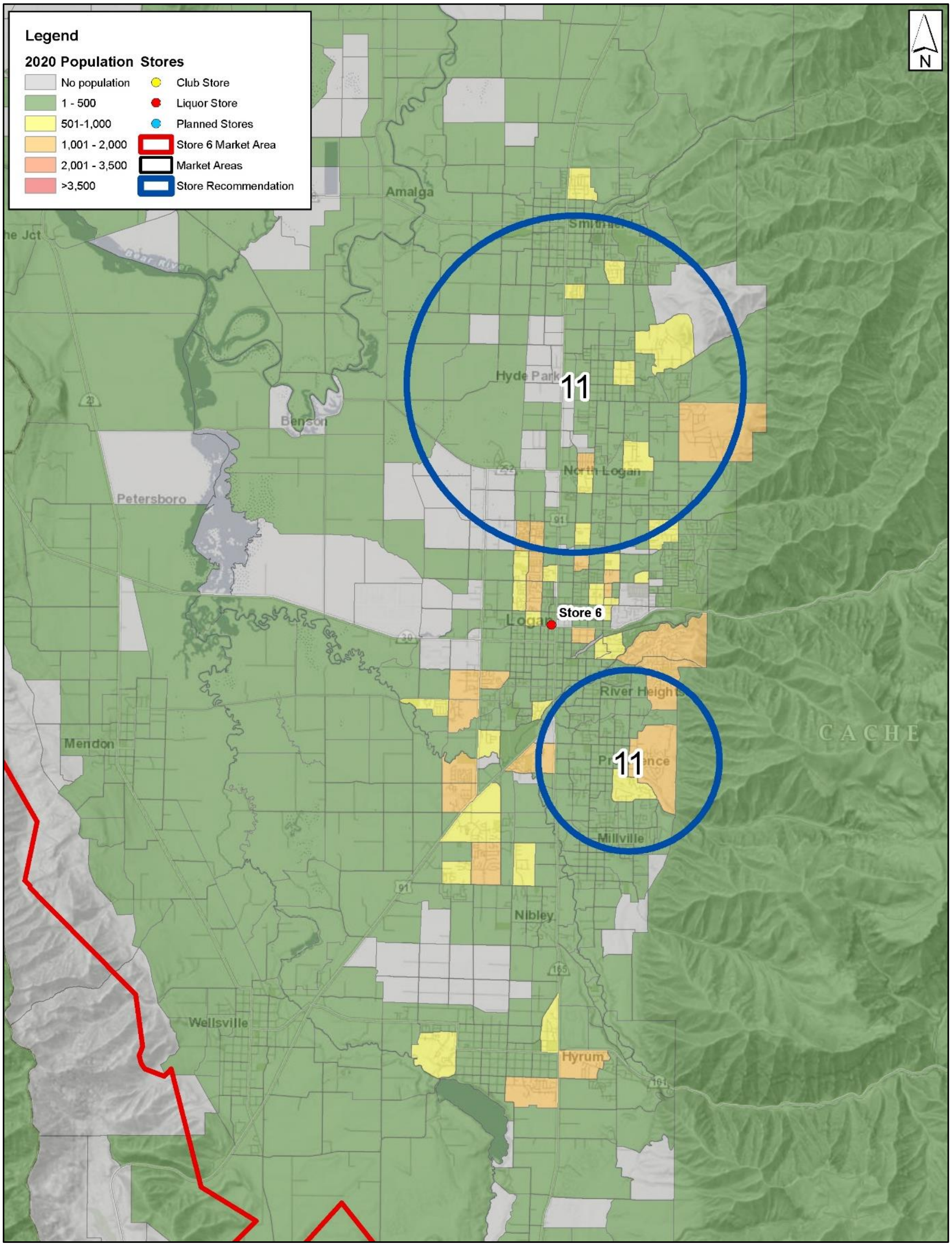


Priority 11: Store 6 – Logan

Store 6 in Logan is ranked 4th in both 2020 Population and 2030 Population. The store is 5th of all stores in this Population Growth 2020-2030 with growth projected throughout the market area. This market area covers a large portion of northern Utah including the entire population north of Logan. A new store in this area could help with future growth. There is also an option to capture growth in the southern area of Cache Valley by placing a new store in Providence.

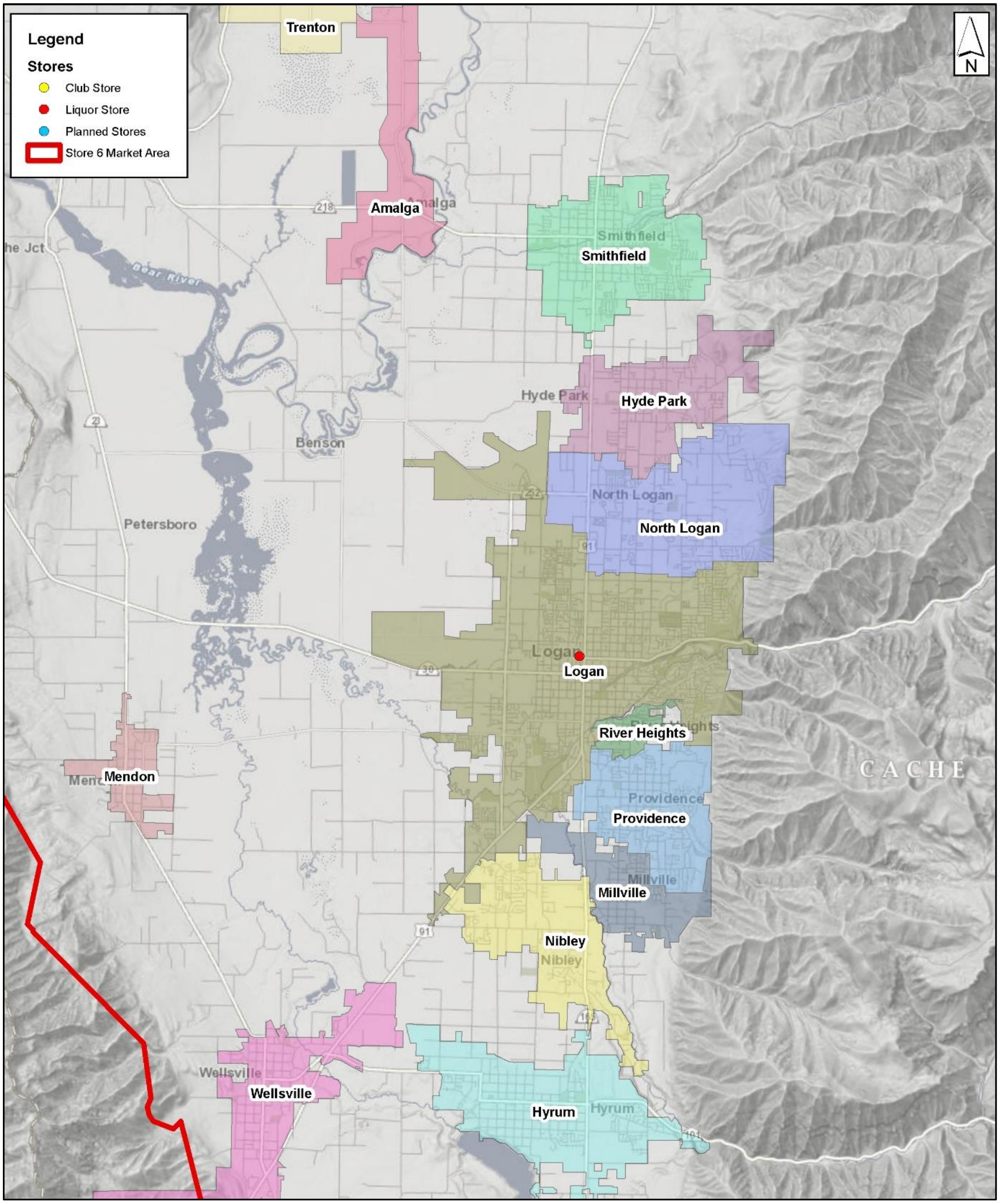


The current population in Cache Valley is centered in and around Logan. Store 6 currently serves an estimated 135,000 people. A new store in one of the surrounding communities could help meet current and future demand on the store.



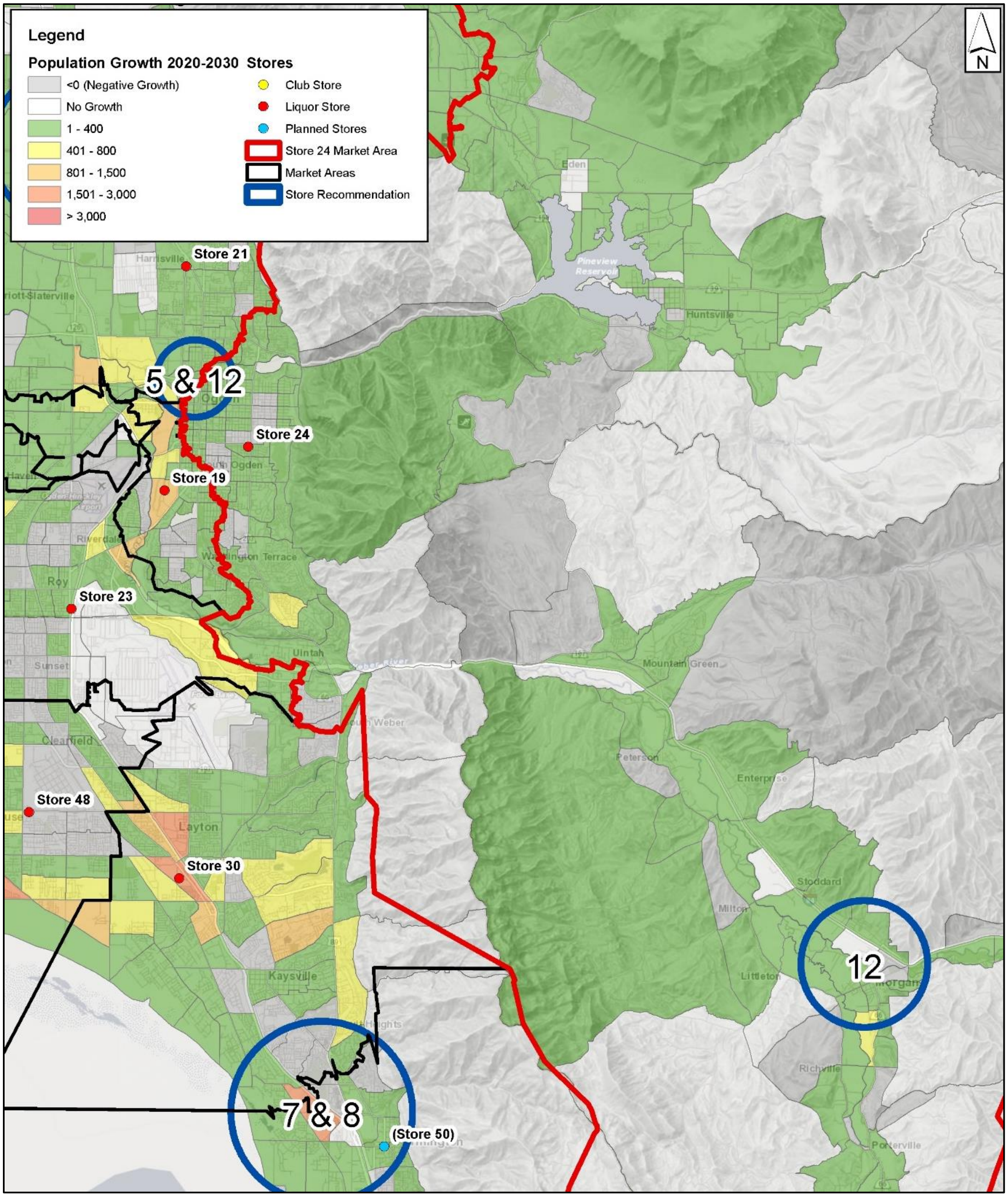
Municipalities locate in this market area include:

- Mendon
- Trenton
- Amalga
- Smithfield
- Hyde Park
- North Logan
- Logan
- River Heights
- Providence
- Millville
- Nibley
- Wellsville
- Hyrum

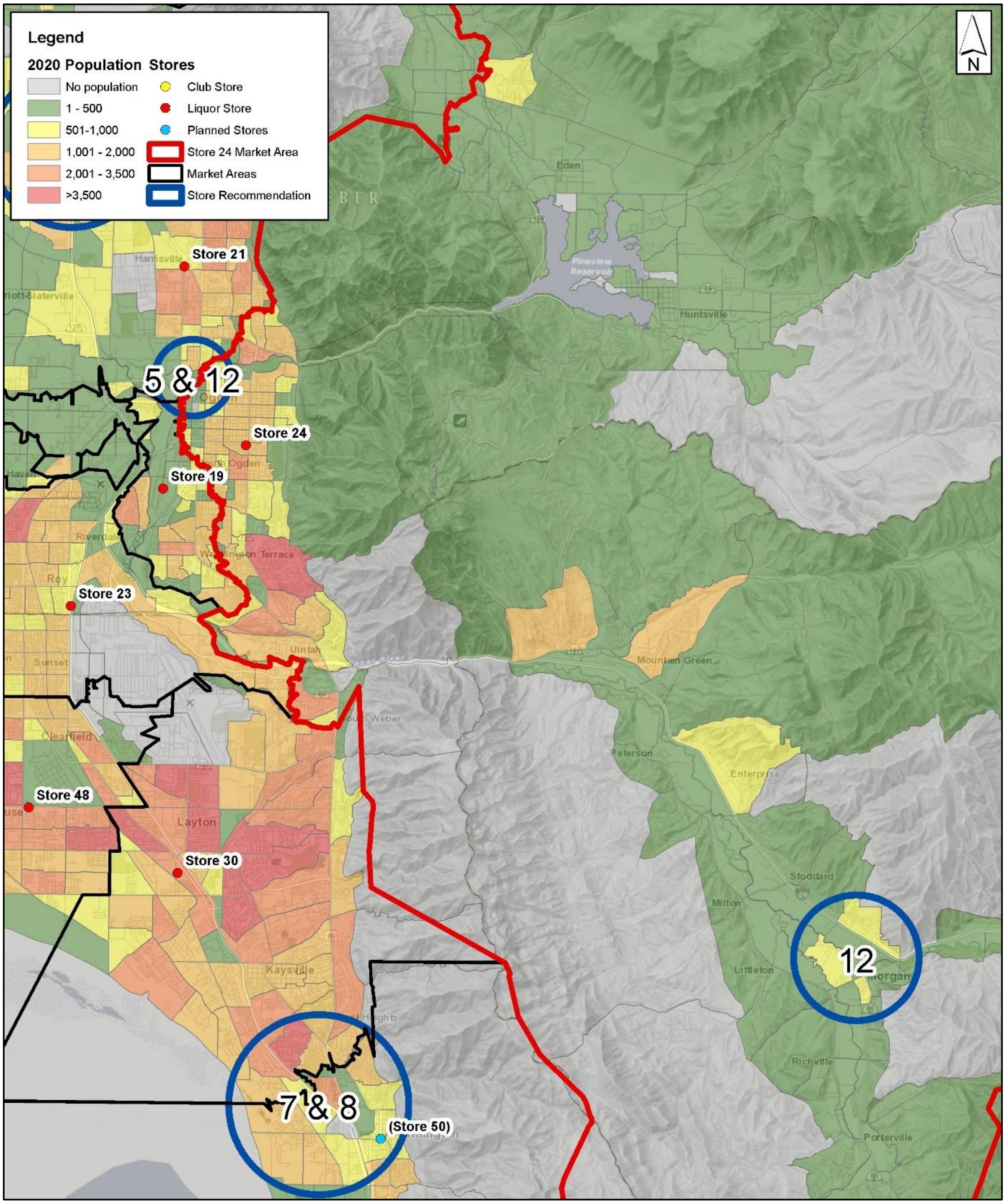


Priority 12: Store 24– Ogden

Store 24 in Ogden covers the eastern portion of Ogden, but also serves the mountain communities east of Ogden such as Huntsville and Morgan. Store 24 ranked 9th in Bottles Sold per Man Hour, however, it did not score as high in population or population growth. This tends to indicate that an additional store in the Ogden area could serve the demand within the immediate area while also serving Store 21 which is listed as the 5th priority. Another option is to build a store in Morgan to better serve the mountain communities in and around the City despite the lack of significant growth in the immediate area.

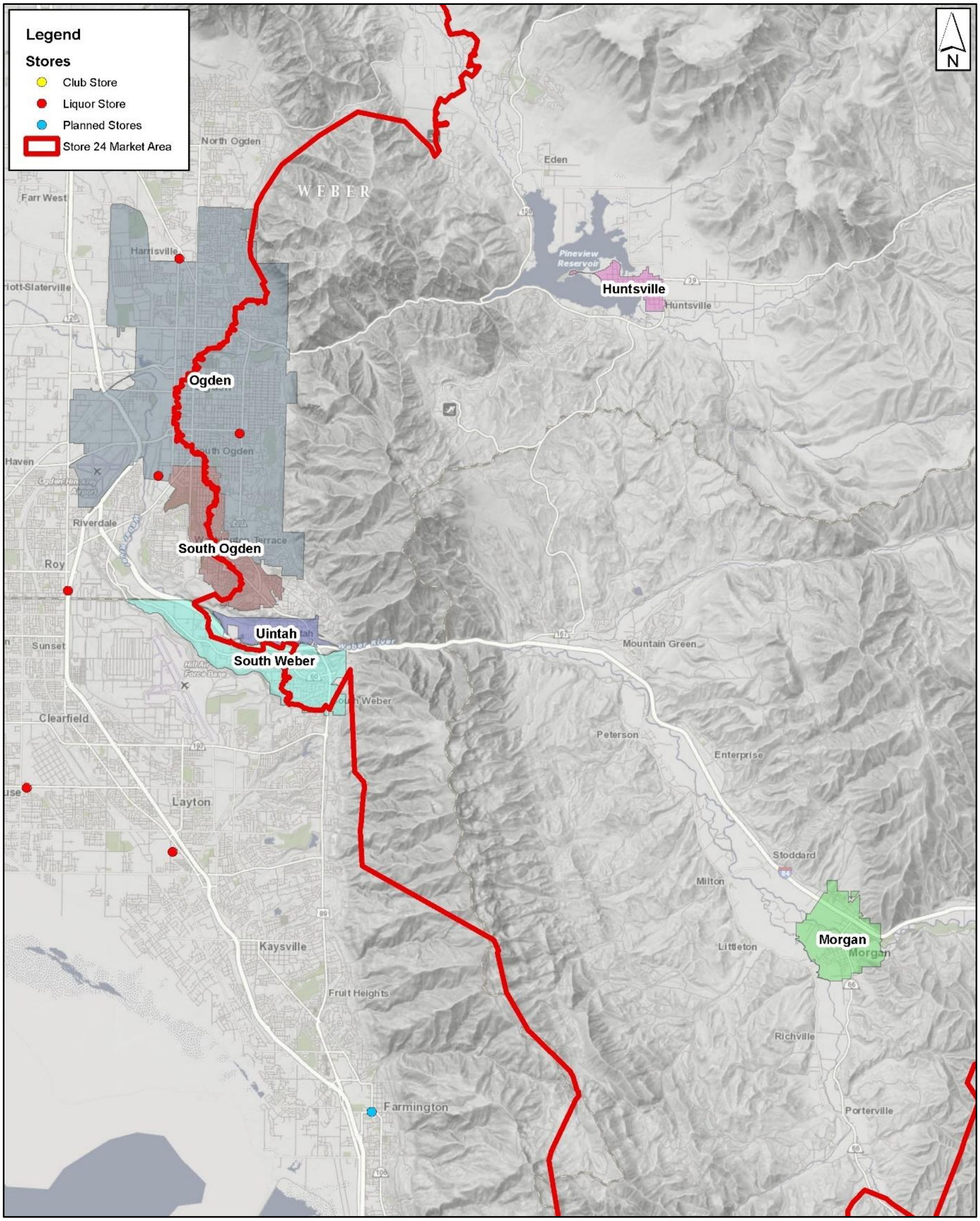


The map below shows the current population in Store 24's market area. The majority of the population is located on the western border of the market area with some pockets of population in the Mountain Green area and Morgan City.



Municipalities locate in this market area include:

- Ogden
- South Ogden
- Uintah
- South Weber
- Huntsville
- Morgan



Potential for Store Relocation or Expansion

While some markets have need for additional stores, other markets could benefit either from store relocation or store expansion, in order to better handle the demands placed on the store. The following four factors were selected and given equal weight to determine which stores could benefit from store relocation or expansion:

- Sales per Square Foot
- Sales per Capita
- Total Transactions
- Transactions per Capita

All sales data used in the analysis were from March 2019 to February 2020. The table below lists all of the stores and their priority for relocation or expansion based on the criteria listed above. There is a significant drop off from the top two stores, which have ranks of 4.3 and 5.5 respectively, to the third highest store, with an average rank of 8.8. This reflects the high productivity and subsequent stress on Stores 2 and 1.

Table 20: Priority for Store Relocation or Expansion Priorities

Priority	Store	City	Address	Rank
1	2	Salt Lake City	1154 Ashton Avenue	4.3
2	1	Salt Lake City	205 West 400 South	5.5
3	15	Cottonwood Heights	1863 East 7000 South	8.8
4	38	Park City	1550 Snow Creek	8.8
5	9	Murray	5056 South State	9.0
6	37	Park City	1612 Ute Blvd.	9.0
7	29	Holladay	1814 E Murray Holladay Road	11.5
8	19	Ogden	3802 Pacific Ave.	11.5
9	25	Millcreek	3255 East 3300 South	12.0
10	16	Sandy	125 West 9000 South	13.3
11	12	Salt Lake City	402 East 6th Ave.	13.8
12	31	Draper	14445 South Minuteman Drive	14.5
13	3	West Valley City	3381 S. Redwood Road	15.3
14	27	Moab	55 West 200 South	16.3
15	41	Salt Lake City	280 West Harris Ave.	17.0
16	21	Harrisville	484 North Wall Ave.	17.8
17	39	St. George	161 North 900 East	18.5
18	36	Park City	460 Swede Aly St. 100	19.5
19	14	Salt Lake City	63 E. Miller Avenue	20.0
20	40	Riverton	13332 So. Market Center Dr.	20.5
21	26	Taylorsville	3905 West 5400 South	21.5
22	35	Salt Lake City	255 South 300 East	22.3
23	46	West Valley City	6262 S 5600 W	22.5
24	23	Roy	5948 South 1900 West	23.0
25	4	Salt Lake City	1615 Foothill Blvd	23.3
26	30	Layton	625 West 600 North	23.5
27	13	Salt Lake City	1255 West North Temple	24.0
28	6	Logan	75 West 400 North	24.3
29	24	Ogden	1156 Patterson Ave.	26.0
30	8	Bountiful	520 North 500 West	27.0
31	43	Heber City	262 East Gateway Dr.	27.8
32	44	Pleasant Grove	671 Pleasant Grove Blvd	29.0
33	11	Magna	7278 West 3500 South	31.0
34	42	Hurricane	202 North Foothill Canyon Dr.	32.0

Priority	Store	City	Address	Rank
35	47	Syracuse	865 w 1700s	33.3
36	10	Tooele	433 North Main	33.5
37	28	Vernal	675 East Main	34.5
38	45	Springville	1551 North 1750 West	35.8
39	17	Orem	1688 North State Street	35.8
40	32	St. George	929 West Sunset Blvd.	37.0
41	18	Cedar City	1580 S Providence Center Dr	38.5
42	7	Price	50 North 100 West	38.8
43	22	Brigham City	43 South 100 West	39.3
44	5	Provo	166 S. Freedom Blvd.	41.3
45	48	Herriman	5278 West Anthem Lane	44.0

The following sections include additional information regarding the top five stores for each of these factors. The stores listed in the overall top five for relocation or expansion are highlighted in the following tables.

Sales per Square Foot

The stores with the highest sales per square foot generally do almost $800 more in sales per square foot than the average store. Furthermore, the stores with the highest sales per square foot are, on average, more than 1,000 square feet smaller than the typical store. Higher sales in a smaller store creates a greater burden on these stores.

Table 21: Top Stores by Sales per Square Foot

Store	Address	City	Sales per Sq. Ft.	Store Size (Square Feet)
2	1154 Ashton Avenue	Salt Lake City	$2,301.96	7,263
23	5948 South 1900 West	Roy	$1,935.03	3,843
37	1612 Ute Blvd.	Park City	$1,906.26	8,177
9	5056 South State	Murray	$1,807.36	7,000
16	125 West 9000 South	Sandy	$1,788.13	11,918
		Average – Top 5 Stores	**$1,947**	**7,640**
		Average – All Stores	**$ 1,146**	**8,937**

Sales per Capita

The top five sales per capita stores are in Park City and Salt Lake City. These stores are in urban areas that are more densely populated. The sales per capita for the top five stores is more than five times that of the average store. It should also be noted that the top four stores on this list are also the bottom four stores in 2020 population.

Table 22: Top Stores by Sales per Capita

Store	Address	City	Sales per Capita
38	1550 Snow Creek	Park City	$6,216
36	460 Swede Aly St. 100	Park City	$1,288
41	280 West Harris Ave.	Salt Lake City	$760
12	402 East 6th Ave.	Salt Lake City	$621

Store	Address	City	Sales per Capita
37	1612 Ute Blvd.	Park City	$591
		Average – Top 5 Stores	**$1,895**
		Average – All Stores	**$351**

Total Transactions

The top producing stores by total transactions on average have over 200,000 transactions than the average store, with an average of 474,120 total transactions compared to 260,306 for all stores.

Table 23: Top Stores by Total Transactions

Store	Address	City	Transactions
16	125 West 9000 South	Sandy	544,380
15	1863 East 7000 South	Cottonwood Heights	496,381
2	1154 Ashton Avenue	Salt Lake City	483,027
3	3381 S. Redwood Road	West Valley City	438,063
9	5056 South State	Murray	408,750
		Average – Top 5 Stores	**474,120**
		Average – All Stores	**260,306**

Transactions per Capita

Likewise, transactions per capita is a good indicator of store performance. Stores with the most transactions per capita are generally located in more urban areas with smaller populations, indicating that the average person in these areas has more transactions than the average person in another market area.

Table 24: Top Stores by Transactions per Capita

Store	Address	City	Transactions per Capita
38	1550 Snow Creek	Park City	78.4
36	460 Swede Aly St. 100	Park City	27.9
1	205 West 400 South	Salt Lake City	16.5
12	402 East 6th Ave.	Salt Lake City	16.5
2	1154 Ashton Avenue	Salt Lake City	13.0
		Average – Top 5 Stores	**30.5**
		Average – All Stores	**7.1**

Population Density

Although not included as a factor in determining current expansion or relocation needs, increasing population densities in the future should be considered when reviewing potential store expansions or relocations. Increasing densities in urban areas, primarily in Salt Lake City, will increase demand in the respective markets. In these cases, store relocation or expansion may be a more feasible option, rather than opening an additional store in the market area.

Options for Addressing Store Inefficiencies

There may be the potential for some stores to address inefficiencies through increasing man hours, expanding checkout capacity, and/or restructuring store floor plans. These options may address existing need more efficiently than adding a new store or expanding existing locations.

Of the stores ranked in the top 12 priority for building a new store, 2 out of 3 stores ranked in the top 12 in bottles per man hour. This was the highest weighted factor in the New Store analysis at 30 percent and indicates that the employees at these stores are handling more bottles during their shifts than other employees at other locations. This demand could be addressed through adding more man hours either through increasing part-time employees at the location to full-time, transferring employees from lower demand stores to higher demand stores, or through hiring new employees where applicable. Increasing the number of man hours at stores experiencing high demand could help reduce lines and increase efficiency.

Another option to address high demand is to increase the number of checkout stations. This option is only applicable to stores with available floor space and may also include hiring additional cashiers if the store doesn’t have excess employee availability. This option would allow stores with high demand to move customers through the store quicker and increase the customer experience.

Stores may also want to conduct a store-by-store analysis of floorplans to address inefficiencies in floor planning that may increase customer traffic flow. This analysis would be performed by store managers and employees and would potentially increase store efficiency and the customer experience through making adjustments to correct inefficiencies in current floor plans.

Potential for New Club Store Outlets

In addition to the potential for new liquor stores in the State of Utah, there is potential for additional club stores in the State. Club stores are liquor stores that serve primarily, but not exclusively, restaurants and other establishments licensed to sell alcoholic beverages, referred to in this report at licensees. The table below summarizes the total licensee sales and bottles sold by market area.

Table 25: Licensee Sales and Bottles Sold by Market Area

Store	City	Store Type	Licensee Sales	Licensee Bottles
33	Salt Lake City	Club Store	$29,589,345	3,227,794
34	Park City	Club Store	$16,527,696	1,220,213
1	Salt Lake City	Liquor Store	$2,278,175	286,108
29	Holladay	Liquor Store	$2,008,907	248,217
27	Moab	Liquor Store	$1,682,692	243,561
39	St. George	Liquor Store	$1,725,718	194,479
16	Sandy	Liquor Store	$1,568,032	188,459
24	Ogden	Liquor Store	$1,341,994	179,934
42	Hurricane	Liquor Store	$1,589,424	160,331
41	Salt Lake City	Liquor Store	$2,324,657	139,578
15	Cottonwood Heights	Liquor Store	$1,155,525	133,535
35	Salt Lake City	Liquor Store	$2,150,920	126,525
19	Ogden	Liquor Store	$1,057,874	114,737
9	Murray	Liquor Store	$566,616	92,984

Store	City	Store Type	Licensee Sales	Licensee Bottles
12	Salt Lake City	Liquor Store	$460,793	82,559
13	Salt Lake City	Liquor Store	$637,637	81,639
38	Park City	Liquor Store	$1,189,284	79,905
18	Cedar City	Liquor Store	$611,697	78,447
25	Millcreek	Liquor Store	$548,414	75,890
43	Heber City	Liquor Store	$735,246	75,729
6	Logan	Liquor Store	$526,270	65,195
21	Harrisville	Liquor Store	$520,515	57,749
30	Layton	Liquor Store	$518,213	56,012
8	Bountiful	Liquor Store	$527,315	54,965
31	Draper	Liquor Store	$575,130	54,012
46	West Valley City	Liquor Store	$492,376	52,042
2	Salt Lake City	Liquor Store	$324,894	50,805
5	Provo	Liquor Store	$438,552	50,458
44	Pleasant Grove	Liquor Store	$444,778	50,191
40	Riverton	Liquor Store	$413,022	44,861
26	Taylorsville	Liquor Store	$367,965	39,377
14	Salt Lake City	Liquor Store	$429,315	36,998
37	Park City	Liquor Store	$284,023	35,315
45	Springville	Liquor Store	$422,449	35,078
17	Orem	Liquor Store	$272,270	31,886
28	Vernal	Liquor Store	$330,163	30,430
3	West Valley City	Liquor Store	$195,632	25,952
32	St. George	Liquor Store	$192,166	17,983
10	Tooele	Liquor Store	$322,159	17,807
11	Magna	Liquor Store	$187,056	17,040
47	Syracuse	Liquor Store	$148,098	13,447
23	Roy	Liquor Store	$117,966	10,895
36	Park City	Liquor Store	$95,523	9,188
7	Price	Liquor Store	$79,085	8,163
48	Herriman	Liquor Store	$64,697	7,436
22	Brigham City	Liquor Store	$85,793	6,047
4	Salt Lake City	Liquor Store	$26,205	4,664
	Grand Total		**$78,152,277**	**7,914,620**

Salt Lake City, which already has a club store, still has the highest amount of licensee sales at the other liquor stores in the City than any other market area. Other market areas with high licensee sales and bottles sold include Holladay, Moab, and St. George. The addition of club stores in these markets can take pressure off the typical liquor stores.

The table below aggregates the licensee sales and bottles sold in clustered market areas. While none of these areas have the same level of licensee sales as the Salt Lake City club store, the remaining licensee sales in Salt Lake City, Holladay, Sandy, and Cottonwood Heights are comparable to those in Park City. Consideration should be made in adding another club store in Salt Lake County.

Other areas with larger licensee sales include St. George, Hurricane, and Cedar City, as well as Ogden, Harrisville, and Roy. Recommendations in this report include additional stores in the St. George, Ogden, and Harrisville market areas. The addition of a club store, rather than typical liquor stores, in this area could serve both the needs of licensees and regular customers.

Table 26: Licensee Sales and Bottles Sold for Clustered Market Areas

Store	Location		Licensee Sales	Licensee Bottles
Salt Lake City, Holladay, Sandy, & Cottonwood Heights				
1	Salt Lake City		$2,278,175	286,108
29	Holladay		$2,008,907	248,217
16	Sandy		$1,568,032	188,459
41	Salt Lake City		$2,324,657	139,578
15	Cottonwood Heights		$1,155,525	133,535
35	Salt Lake City		$2,150,920	126,525
12	Salt Lake City		$460,793	82,559
13	Salt Lake City		$637,637	81,639
2	Salt Lake City		$324,894	50,805
14	Salt Lake City		$429,315	36,998
4	Salt Lake City		$26,205	4,664
		Total	**$13,365,060**	**1,379,087**

St. George, Hurricane, & Cedar City				
39	St. George		$1,725,718	194,479
42	Hurricane		$1,589,424	160,331
18	Cedar City		$611,697	78,447
32	St. George		$192,166	17,983
		Total	**$4,119,005**	**451,240**

Ogden, Harrisville, & Roy				
24	Ogden		$1,341,994	179,934
19	Ogden		$1,057,874	114,737
21	Harrisville		$520,515	57,749
23	Roy		$117,966	10,895
		Total	**$3,038,349**	**363,315**

Evaluation of Retail Sales and Economic Impacts

The purpose of the tasks in this section is to compare performance between existing retail outlets in order to better forecast future needs and factors influencing profitability.

Sales per Square Foot Analysis

Stores with greater sales per square foot (top 12 stores) average almost $600 more per square foot than the average store. A number of factors were compared with sales per square foot to identify possible correlations, including store size, market area, population, and incomes. Stores with higher sales per square foot are generally smaller than the average store, have a higher population density, and a higher employment density. These top stores also serve a smaller market area. Furthermore, the stores with higher sales per square foot have a greater per capita income than the average store, and generally serve a demographic with a higher median age.

Table 27: Top Stores by Sales per Square Foot

Store	City	Sales per Sq Ft	Store Size	Market Area (Sq Miles)	Population (per Sq Mile)	Employment (per Sq Mile)	HH Income	Per Capita Income	Median Age
2	Salt Lake City	$2,302	7,263	6	6,581	3,414	$70,976.61	$25,093.06	33.6
23	Roy	$1,935	3,843	156	238	247	$73,478.70	$21,345.22	30.9
37	Park City	$1,906	8,177	1,020	37	20	$110,678.35	$42,385.67	39.2
9	Murray	$1,807	7,000	14	2,716	5,277	$56,930.55	$21,258.52	34.6
16	Sandy	$1,788	11,918	37	1,005	3,508	$80,015.40	$23,823.30	35.1
27	Moab	$1,619	4,214	16,021	2	1	$44,106.61	$17,436.24	36.1
1	Salt Lake City	$1,602	8,129	4	9,517	13,481	$43,741.65	$11,475.91	33.1
14	Salt Lake City	$1,592	2,768	6	5,945	6,517	$44,077.02	$15,801.67	31.3
38	Park City	$1,592	12,081	4	9,842	1,722	$126,389.79	$38,651.07	44.9
35	Salt Lake City	$1,545	6,275	13	2,803	5,801	$52,177.63	$24,180.28	32.0
15	Cottonwood Heights	$1,544	14,592	80	466	636	$93,345.03	$33,733.64	38.4
19	Ogden	$1,534	6,300	11	3,263	2,423	$56,974.11	$15,665.89	33.1
Average – Top 12 Stores		**$1,730**	**7,713**	**1,448**	**3,535**	**3,587**	**$71,074**	**$24,238**	**35.2**
Average – All Stores		**$1,146**	**8,937**	**1,862**	**1,678**	**1,632**	**$71,506**	**$23,041**	**33.1**

On the other hand, stores with lower sales per square foot generally are larger stores, which serve a large population and market area, and have a much smaller population density. Furthermore, these stores have lower incomes and a slightly lower median age.

Table 28: Bottom Stores by Sales per Square Foot

Store	City	Sales per SF	Store Size	Market Area (Sq Miles)	Population (per Sq Mile)	Employment (per Sq Mile)	HH Income	Per Capita Income	Median Age
18	Cedar City	$427	13,960	17,802	5	3	$48,563.79	$18,217.97	33.6
42	Hurricane	$450	12,517	1,021	34	14	$52,431.67	$16,972.25	36.0
47	Syracuse	$486	13,200	178	424	227	$75,433.02	$20,036.15	28.7
10	Tooele	$556	11,375	11,032	7	2	$69,131.00	$21,384.06	31.1

Store	City	Sales per SF	Store Size	Market Area (Sq Miles)	Population (per Sq Mile)	Employment (per Sq Mile)	HH Income	Per Capita Income	Median Age
43	Heber City	$565	12,362	2,179	17	8	$76,960.33	$24,657.78	33.3
5	Provo	$639	6,004	49	2,412	1,946	$49,222.84	$16,221.79	25.5
7	Price	$682	3,516	8,336	5	3	$50,419.73	$18,386.00	36.1
45	Springville	$714	12,586	7,115	31	14	$67,936.18	$19,151.96	28.5
22	Brigham City	$787	3,517	5,246	10	5	$60,605.20	$20,201.40	32.4
13	Salt Lake City	$791	8,558	169	255	476	$46,390.19	$13,244.18	29.4
46	West Valley City	$879	13,200	26	3,173	765	$79,441.58	$15,703.76	29.1
32	St. George	$884	4,740	1,264	58	25	$58,536.85	$22,122.33	41.1
Average – Bottom 12 Stores		**$655**	**9,628**	**4,535**	**536**	**291**	**$61,256**	**$18,858**	**32.1**
Average – All Stores		**$1,146**	**8,937**	**1,862**	**1,678**	**1,632**	**$71,506**	**$23,041**	**33.1**

Sales per Capita Analysis

The table below lists the top 12 stores by sales per capita. Stores with high sales per capita generally fall into one of two categories: areas of high population or employment density, or areas with higher household or per capita incomes. Based on these results, it appears that the more successful stores, on a sales per capita basis, are generally located in more urban areas, specifically Salt Lake City, or in areas with higher incomes, and generally have higher median ages than other areas.

Table 29: Top Stores by Sales per Capita

Store	City	Sales Per Capita	Population (per Sq Mile)	Employment (per Sq Mile)	HH Income	Per Capita Income	Median Age
38	Park City	$6,215.84	817	1,722	$126,389.79	$38,651.07	44.9
36	Park City	$1,288.27	60	291	$93,313.77	$40,020.87	35.7
41	Salt Lake City	$760.20	4,967	9,141	$41,408.53	$15,323.80	34.6
12	Salt Lake City	$620.63	970	779	$99,998.57	$38,566.77	38.5
37	Park City	$591.24	26	20	$110,678.35	$42,385.67	39.2
1	Salt Lake City	$536.94	6,197	13,481	$43,741.65	$11,475.91	33.1
25	Millcreek	$476.49	225	78	$93,285.90	$32,975.80	40.5
2	Salt Lake City	$448.86	6,581	3,414	$70,976.61	$25,093.06	33.6
29	Holladay	$354.51	4,664	2,483	$74,178.32	$31,284.25	38.7
19	Ogden	$346.28	2,445	2,423	$56,974.11	$15,665.89	33.1
15	Cottonwood Heights	$283.41	994	636	$93,345.03	$33,733.64	38.4
27	Moab	$239.61	2	1	$44,106.61	$17,436.24	36.1
Average – Top 12		**$1,014**	**2,329**	**2,872**	**$79,033**	**$28,551**	**37.2**
Average – All Stores		$351	**1,678**	**1,632**	**$71,506**	**$23,041**	**33.1**

Revenue and Expenses Analysis

The following table lists, in descending order, the sales per man hour. Higher sales per man hour provide greater profitability and also indicate that these stores have a high demand placed on employees.

Table 30: Sales per Man Hour

Store	Address	City	Square Feet	Sales: March 2019 – Feb. 2020	Man Hours	Sales per Man Hour
37	1612 Ute Blvd.	Park City	8,177	$15,587,449	16,016	$973.23
38	1550 Snow Creek	Park City	12,081	$19,228,128	20,359	$944.44
41	280 West Harris Ave.	Salt Lake City	12,600	$13,772,648	15,640	$880.62
31	14445 South Minuteman Drive	Draper	13,183	$16,344,551	18,692	$874.44
44	671 Pleasant Grove Blvd	Pleasant Grove	12,980	$12,586,465	15,338	$820.61
39	161 North 900 East	St. George	10,000	$11,604,675	14,395	$806.15
25	3255 East 3300 South	Millcreek	8,490	$12,328,942	15,890	$775.88
16	125 West 9000 South	Sandy	11,918	$21,310,945	27,628	$771.35
12	402 East 6th Ave.	Salt Lake City	7,068	$8,174,137	10,644	$767.96
40	13332 So. Market Center Dr.	Riverton	10,065	$12,980,896	16,927	$766.90
15	1863 East 7000 South	Cottonwood Heights	14,592	$22,526,515	29,687	$758.79
29	1814 E Murray Holladay Road	Holladay	12,895	$16,609,175	22,101	$751.51
21	484 North Wall Ave.	Harrisville	8,000	$11,465,669	15,474	$740.95
8	520 North 500 West	Bountiful	13,139	$12,178,926	16,790	$725.37
24	1156 Patterson Ave.	Ogden	9,000	$9,477,953	13,178	$719.24
3	3381 S. Redwood Road	West Valley City	11,782	$11,892,756	17,244	$689.68
35	255 South 300 East	Salt Lake City	6,275	$9,692,333	14,202	$682.46
23	5948 South 1900 West	Roy	3,843	$7,436,305	10,955	$678.80
30	625 West 600 North	Layton	9,782	$10,684,849	15,904	$671.86
2	1154 Ashton Avenue	Salt Lake City	7,263	$16,719,157	24,937	$670.46
19	3802 Pacific Ave.	Ogden	6,300	$9,666,897	14,423	$670.23
43	262 East Gateway Dr.	Heber City	12,362	$6,982,262	10,457	$667.71
6	75 West 400 North	Logan	7,282	$10,256,724	15,575	$658.54
18	1580 S Providence Center Dr	Cedar City	13,960	$5,961,950	9,190	$648.74
10	433 North Main	Tooele	11,375	$6,325,490	9,773	$647.24
13	1255 West North Temple	Salt Lake City	8,558	$6,768,732	10,614	$637.75
45	1551 North 1750 West	Springville	12,586	$8,986,837	14,162	$634.59
9	5056 South State	Murray	7,000	$12,651,505	20,289	$623.57
27	55 West 200 South	Moab	4,214	$6,821,649	11,127	$613.09
42	202 North Foothill Canyon Dr.	Hurricane	12,517	$5,635,341	9,473	$594.90
11	7278 West 3500 South	Magna	6,242	$5,721,403	9,971	$573.82
4	1615 Foothill Blvd	Salt Lake City	4,239	$5,367,802	9,723	$552.09
46	6262 South 5600 West	West Valley City	13,200	$11,608,126	21,091	$550.38
1	205 West 400 South	Salt Lake City	8,129	$13,022,711	23,671	$550.17

Store	Address	City	Square Feet	Sales: March 2019 – Feb. 2020	Man Hours	Sales per Man Hour
17	1688 North State Street	Orem	5,800	$5,556,586	10,255	$541.87
26	3905 West 5400 South	Taylorsville	11,670	$10,948,902	20,273	$540.08
14	63 E. Miller Avenue	Salt Lake City	2,768	$4,406,416	9,631	$457.51
32	929 West Sunset Blvd.	St. George	4,740	$4,192,291	9,753	$429.86
5	166 S. Freedom Blvd.	Provo	6,004	$3,833,956	9,130	$419.93
28	675 East Main	Vernal	3,738	$3,919,228	9,575	$409.31
22	43 South 100 West	Brigham City	3,517	$2,768,894	6,784	$408.18
47	865 w 1700s	Syracuse	13,200	$6,416,844	15,732	$407.89
48	5278 West Anthem Lane	Herriman	13,600	$4,083,804	10,627	$384.28

Analysis of Economic and Fiscal Impacts to Local Communities

The major purpose of the tasks in this section is to identify the benefits to local communities that host liquor outlets in terms of property and sales tax revenues. Tourism impacts will also be considered.

Sales Tax Impacts

Sales per square foot for liquor stores is considerably higher than the average sales per square foot in other types of retail stores. Average sales reach $1,170 per square foot, which is higher than the averages for the following well-known retail stores that are in high demand in communities:

Costco	$1,050
Walgreens	$760
Olive Garden	$540

Sales at liquor stores in Utah range between a high of $2,302 and a low of $300 per square foot as shown in the following table.

Table 31: Store Sales per Square Foot

Store	Street Address	City	Square Feet	Sales: March 2019 thru Feb 2020	Sales per Sq Ft
2	1154 Ashton Avenue	Salt Lake City	7,263	$16,719,157	$2,302
23	5948 South 1900 West	Roy	3,843	$7,436,305	$1,935
37	1612 Ute Blvd.	Park City	8,177	$15,587,449	$1,906
33	1675 S 900 West	Salt Lake City	16,723	$30,478,405	$1,823
9	5056 South State	Murray	7,000	$12,651,505	$1,807
16	125 West 9000 South	Sandy	11,918	$21,310,945	$1,788
27	55 West 200 South	Moab	4,214	$6,821,649	$1,619
1	205 West 400 South	Salt Lake City	8,129	$13,022,711	$1,602
34	1901 Sidewinder	Park City	10,607	$16,978,182	$1,601
14	63 E. Miller Avenue	Salt Lake City	2,768	$4,406,416	$1,592
38	1550 Snow Creek	Park City	12,081	$19,228,128	$1,592
35	255 South 300 East	Salt Lake City	6,275	$9,692,333	$1,545

Store	Street Address	City	Square Feet	Sales: March 2019 thru Feb 2020	Sales per Sq Ft
15	1863 East 7000 South	Cottonwood Heights	14,592	$22,526,515	$1,544
19	3802 Pacific Ave.	Ogden	6,300	$9,666,897	$1,534
25	3255 East 3300 South	Millcreek	8,490	$12,328,942	$1,452
21	484 North Wall Ave.	Harrisville	8,000	$11,465,669	$1,433
6	75 West 400 North	Logan	7,282	$10,256,724	$1,409
40	13332 So. Market Center Dr.	Riverton	10,065	$12,980,896	$1,290
29	1814 E Murray Holladay Road	Holladay	12,895	$16,609,175	$1,288
4	1615 Foothill Blvd	Salt Lake City	4,239	$5,367,802	$1,266
31	14445 South Minuteman Drive	Draper	13,183	$16,344,551	$1,240
39	161 North 900 East	St. George	10,000	$11,604,675	$1,160
12	402 East 6th Ave.	Salt Lake City	7,068	$8,174,137	$1,156
41	280 West Harris Ave.	Salt Lake City	12,600	$13,772,648	$1,093
30	625 West 600 North	Layton	9,782	$10,684,849	$1,092
24	1156 Patterson Ave.	Ogden	9,000	$9,477,953	$1,053
28	675 East Main	Vernal	3,738	$3,919,228	$1,048
3	3381 S. Redwood Road	West Valley City	11,782	$11,892,756	$1,009
44	671 Pleasant Grove Blvd	Pleasant Grove	12,980	$12,586,465	$970
17	1688 North State Street	Orem	5,800	$5,556,586	$958
36	460 Swede Aly St. 100	Park City	2,500	$2,393,546	$957
26	3905 West 5400 South	Taylorsville	11,670	$10,948,902	$938
8	520 North 500 West	Bountiful	13,139	$12,178,926	$927
11	7278 West 3500 South	Magna	6,242	$5,721,403	$917
32	929 West Sunset Blvd.	St. George	4,740	$4,192,291	$884
46	6262 South 5600 West	West Valley City	13,200	$11,608,126	$879
13	1255 West North Temple	Salt Lake City	8,558	$6,768,732	$791
22	43 South 100 West	Brigham City	3,517	$2,768,894	$787
45	1551 North 1750 West	Springville	12,586	$8,986,837	$714
7	50 North 100 West	Price	3,516	$2,397,905	$682
5	166 S. Freedom Blvd.	Provo	6,004	$3,833,956	$639
43	262 East Gateway Dr.	Heber City	12,362	$6,982,262	$565
10	433 North Main	Tooele	11,375	$6,325,490	$556
47	865 w 1700s	Syracuse	13,200	$6,416,844	$486
42	202 North Foothill Canyon Dr.	Hurricane	12,517	$5,635,341	$450
18	1580 S Providence Center Dr	Cedar City	13,960	$5,961,950	$427
48	5278 West Anthem Lane	Herriman	13,600	$4,083,804	$300
		Median	**9,000**	**$9,692,333**	**$1,093**
		Average	**9,138**	**$10,356,486**	**$1,170**

These higher sales per square foot create positive fiscal impacts for the communities in which they are located. In Utah, communities receive one-half of one percent (0.50%) of total sales generated, based on local option point-of-sale distribution to cities. In addition, counties can receive one-eighth of one percent (0.125%) based on the local option point-of-sale distribution.

With a total of $439 million in liquor store sales between March 2019 and February 2020 (not including club stores), the total point-of-sale distribution to cities reach over $2 million. Counties, if they have enacted the local option sales tax, were eligible for $500,000 in sales tax revenues.

A sample of individual store impacts is shown in the following tables for stores with relatively high, medium and low sales.

Table 32: Sample Sales Tax Revenue Impacts – Store with High-Level Sales

High Sales Store – 1863 East 7000 South, Cottonwood Heights		
Total Sales (March 2019 thru February 2020)	$22,526,515.03	
	Sales Tax Revenues	**Tax Percentage**
State	$1,092,535.98	4.85%
Salt Lake County*	$56,316.29	0.25%
Cottonwood Heights*	$225,265.15	1.00%
Mass Transit	$67,579.55	0.30%
Additional Mass Transit	$56,316.29	0.25%
Transportation Infrastructure	$ 56,316.29	0.25%
County Option Transportation	$56,316.29	0.25%
Botanical, Cultural, Zoo Tax (County)	$22,526.52	0.10%
Total Tax Revenues	**$1,633,172.34**	**7.25%**

*While Cottonwood Heights generates one percent through its local option rate, only one-half of that amount is returned to the City based on point of sale. The same is true for counties who receive only one-half of the amount generated by their sales tax rate based on point of sale.

Table 33: Sample Sales Tax Revenue Impacts - Store with Medium-Level Sales

Medium Sales Store – 6262 S 5600 W, West Valley City		
Total Sales (March 2019 thru February 2020)	$11,608,125.69	
	Sales Tax Revenues	**Tax Percentage**
State	$562,994.10	4.85%
Salt Lake County*	$29,020.31	0.25%
West Valley City*	$116,081.26	1.00%
Mass Transit	$34,824.38	0.30%
Additional Mass Transit	$29,020.31	0.25%
Transportation Infrastructure	$29,020.31	0.25%
County Option Transportation	$29,020.31	0.25%
Botanical, Cultural, Zoo Tax (County)	$11,608.13	0.10%
Total Tax Revenues	**$841,589.11**	**7.25%**

*While West Valley City generates one percent through its local option rate, only one-half of that amount is returned to the City based on point of sale. The same is true for counties who receive only one-half of the amount generated by their sales tax rate based on point of sale.

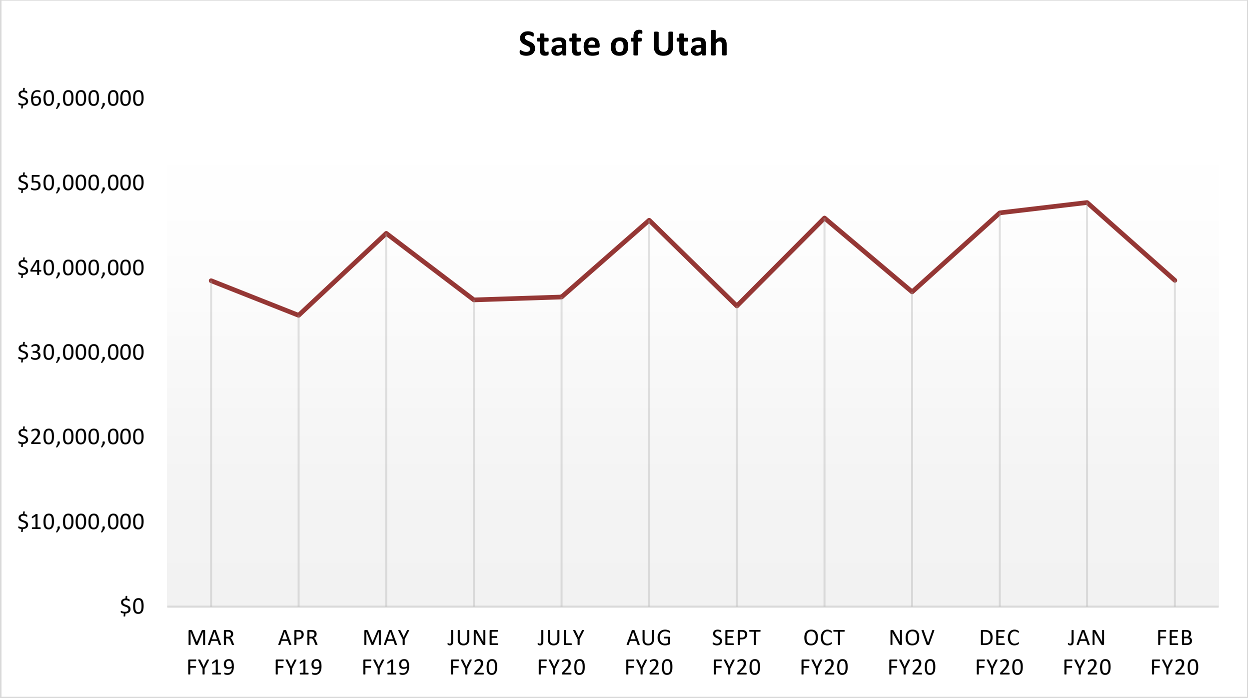
Table 34: Sample Sales Tax Revenue Impacts - Store with Low-Level Sales

Low Sales Store – 929 West Sunset Blvd., St. George		
Total Sales	$4,192,291.88	
	Sales Tax Revenues	**Tax Percentage**
State	$203,326.11	4.85%
Washington County	$10,480.73	0.25%
St. George City	$41,922.91	1.00%
Highway Tax	$12,576.87	0.30%
Transportation Infrastructure	$10,480.73	0.25%
Botanical, Cultural, Zoo Tax (Municipal)	$4,192.29	0.10%
Total Tax Revenues	**$282,979.63**	**6.75%**

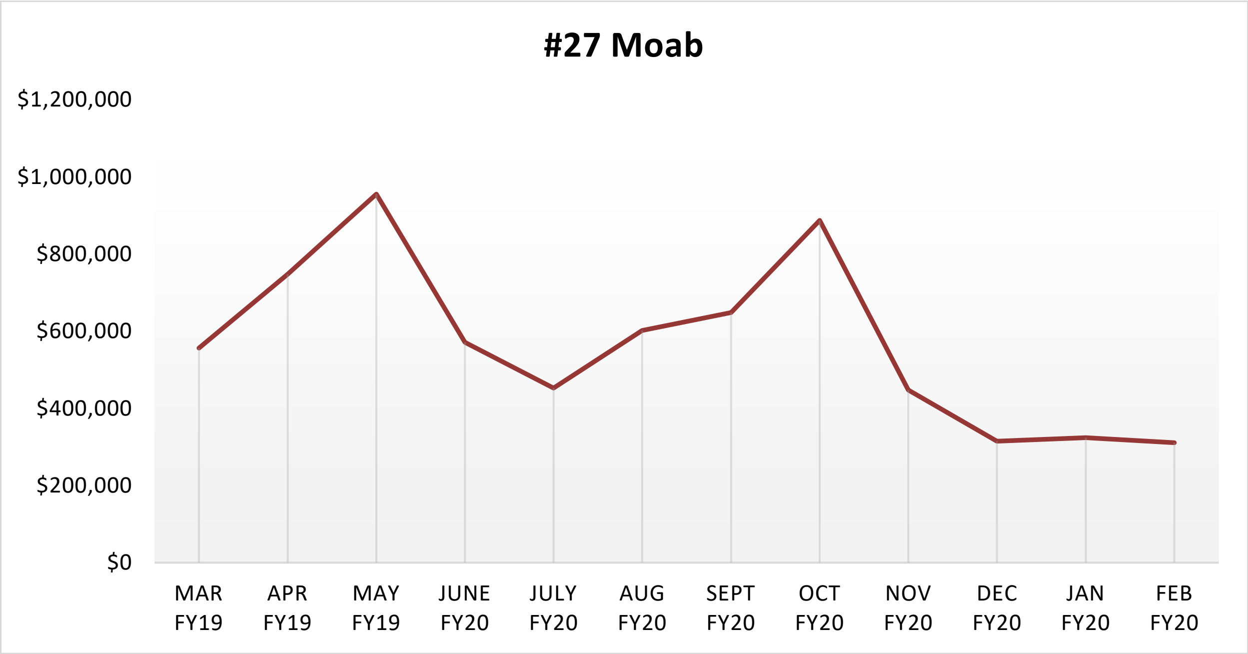
*While St. George generates one percent through its local option rate, only one-half of that amount is returned to the City based on point of sale. The same is true for counties who receive only one-half of the amount generated by their sales tax rate based on point of sale.

Seasonality and Tourism Impacts

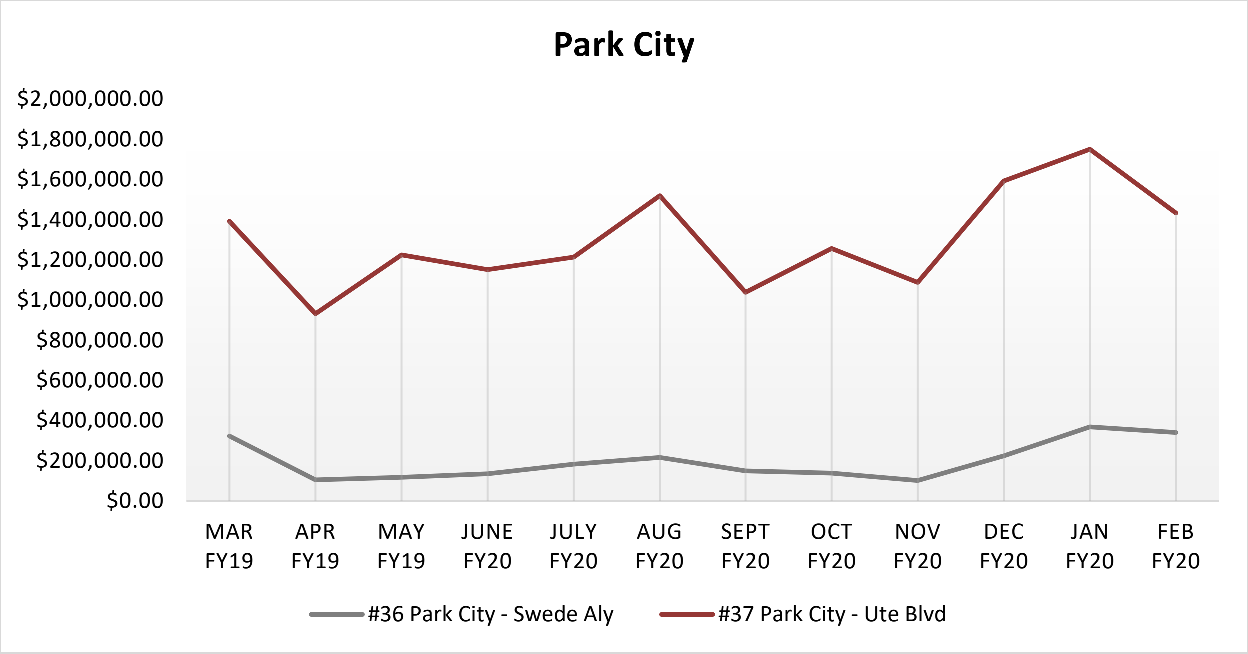
Liquor store sales statewide show some seasonality, with increased sales during the holiday season.



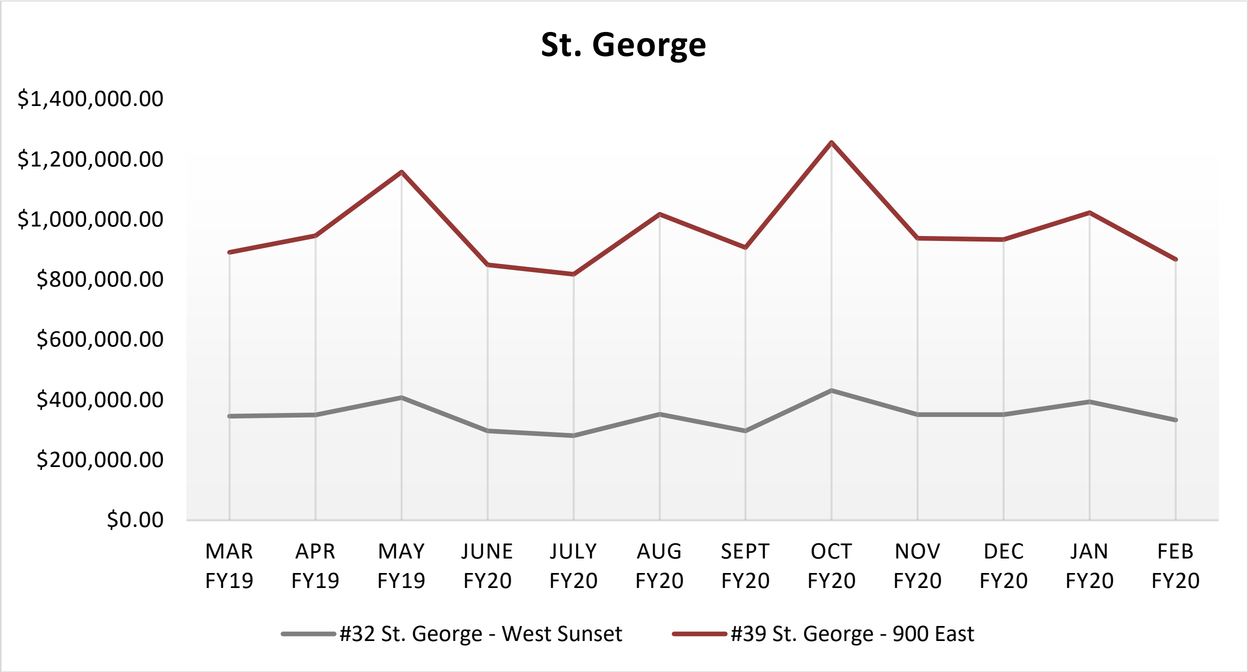
In comparison, stores in tourist communities show increased sales during their peak visitor periods. Moab has strong spring and fall visitation, and this is reflected in the spikes in sales in the Moab store during the spring and fall months. Winters and warmer summer months see a decrease in sales corresponding with lower visitors.



Park City shows increased sales during the winter months, including the holiday season. The highest visitation period for Park City is the week between Christmas and New Year's. There is also a smaller increase in the summer as visitations for summer activities in Park City bring a smaller yet substantial number of visitors.



The two St. George stores also reflect tourism trends with the highest sales occurring during the months of Spring Break and UEA. The usual increase in sales during the holiday season is also apparent.



Appendix A: Sensitivity Analysis

The following are additional scenarios that were calculated using different weights for the priority factors.

Final Weights

Population 2020	Population 2030	Population Growth 2020-2030	Pop Density 2020	Bottles per Man Hour	Transactions per Capita
20%	10%	10%	10%	30%	20%

Alternate 1

Population 2020	Population 2030	Population Growth 2020-2030	Pop Density 2020	Bottles per Man Hour	Transactions per Capita
15%	15%	10%	10%	25%	25%

Alternate 2

Population 2020	Population 2030	Population Growth 2020-2030	Pop Density 2020	Bottles per Man Hour	Transactions per Capita
20%	30%	15%	15%	10%	10%

	Final Weight		Alternate 1		Alternate 2	
Rank	Store	City	Store	City	Store	City
1	16	Sandy	16	Sandy	16	Sandy
2	44	Pleasant Grove	31	Draper	44	Pleasant Grove
3	31	Draper	44	Pleasant Grove	40	Riverton
4	40	Riverton	40	Riverton	30	Layton
5	21	Harrisville	21	Harrisville	6	Logan
6	39	St. George	39	St. George	45	Springville
7	8	Bountiful	30	Layton	21	Harrisville
8	30	Layton	8	Bountiful	8	Bountiful
9	15	Cottonwood Heights	15	Cottonwood Heights	5	Provo
10	3	West Valley City	2	Salt Lake City	31	Draper
11	6	Logan	3	West Valley City	39	St. George
12	24	Ogden	6	Logan	23	Roy
13	2	Salt Lake City	24	Ogden	17	Orem
14	29	Holladay	29	Holladay	24	Ogden
15	45	Springville	37	Park City	46	West Valley City
16	37	Park City	12	Salt Lake City	48	Herriman
17	12	Salt Lake City	45	Springville	3	West Valley City
18	23	Roy	19	Ogden	18	Cedar City
19	19	Ogden	1	Salt Lake City	10	Tooele
20	25	Millcreek	9	Murray	26	Taylorsville
21	9	Murray	23	Roy	15	Cottonwood Heights
22	46	West Valley City	25	Millcreek	9	Murray
23	1	Salt Lake City	46	West Valley City	32	St. George
24	18	Cedar City	26	Taylorsville	2	Salt Lake City
25	27	Moab	13	Salt Lake City	29	Holladay

	Final Weight		Alternate 1		Alternate 2	
Rank	**Store**	**City**	**Store**	**City**	**Store**	**City**
26	13	Salt Lake City	18	Cedar City	47	Syracuse
27	26	Taylorsville	27	Moab	1	Salt Lake City
28	5	Provo	38	Park City	11	Magna
29	17	Orem	5	Provo	19	Ogden
30	10	Tooele	41	Salt Lake City	14	Salt Lake City
31	38	Park City	10	Tooele	43	Heber City
32	41	Salt Lake City	17	Orem	42	Hurricane
33	43	Heber City	43	Heber City	13	Salt Lake City
34	11	Magna	14	Salt Lake City	35	Salt Lake City
35	14	Salt Lake City	11	Magna	41	Salt Lake City
36	42	Hurricane	42	Hurricane	37	Park City
37	47	Syracuse	47	Syracuse	28	Vernal
38	48	Herriman	48	Herriman	22	Brigham City
39	32	St. George	32	St. George	12	Salt Lake City
40	4	Salt Lake City	4	Salt Lake City	25	Millcreek
41	35	Salt Lake City	35	Salt Lake City	27	Moab
42	22	Brigham City	36	Park City	38	Park City
43	28	Vernal	22	Brigham City	4	Salt Lake City
44	36	Park City	28	Vernal	7	Price
45	7	Price	7	Price	36	Park City