Department of Alcoholic Beverage Control

2021 Master Plan

Zions Public Finance, Inc.
July 2021

Contents

Contents 1
Background 2
Demographic Trends and Growth Patterns 5
Statewide Growth Trends 5
Population 5
Alcoholic Beverage Consumption 9
Market Area Analysis 10
2021 Population 17
2031 Population 18
Absolute Population Growth, 2021-2031 19
Population Density, 2021 19
Bottles per Hour 20
Transactions per Capita 20
Potential for New Outlets 21
Potential for Store Relocation or Expansion 72
Sales per Square Foot 73
Sales per Capita 73
Total Transactions 74
Transactions per Capita 74
Options for Addressing Store Inefficiencies 75
Potential for New Club Store Outlets 75
Evaluation of Retail Sales and Economic Impacts 78
Sales per Square Foot Analysis 78
Sales per Capita Analysis 79
Revenue and Expenses Analysis 80
Analysis of Economic and Fiscal Impacts to Local Communities 81
Appendix A: Sensitivity Analysis 87

Background

Background

Zions Public Finance, Inc. (ZPFI) was retained in 2021 to conduct an evaluation of the need for additional liquor stores in the State of Utah, locations of any such stores, and to provide a general analysis of possible store inefficiencies. ZPFI performed similar studies for the division in 2016, 2018, and 2020.

Growth in Demand

Growth in demand for new liquor stores will come from several factors: 1) migration from other states; 2) increased consumption among current residents; and 3) the tourism and convention industry. Utah law 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 68. There are currently 49 stores with legally allowable capacity for an additional 19 stores.

Table 1: Utah Population Growth and Allowable Liquor Stores

	2021	2031	2041
Total State Population	3,271,616	3,946,122	4,520,678
Population per Store	48,000	48,000	48,000
Total Allowable Stores	68	82	94
Current Stores	49	49	49
Additional Allowable Stores	**19**	**33**	**45**

Source: Gardner Policy Institute, US Census

As shown above, there is a legal basis for 19 additional stores throughout the State. By 2041, it is estimated that the State will allow for 45 new stores, almost doubling the current number of stores. Such growth presents the State with the opportunity to prepare for the future and plan for areas where demand will most increase.

Market Area Analysis

To better understand growth trends for each outlet, ZPFI conducted a sophisticated GIS analysis to determine the market area for each outlet. The model calculated the nearest store based on driving time for addresses throughout the entire State. While many factors determine which market areas should need additional liquor stores, ZPFI determined that some are more important than others. Of the more than 20 factors initially considered in the analysis, those deemed most relevant are:

- 2021 population
- 2031 population
- Absolute population growth 2021-2031
- Population density 2021
- Bottles per labor hour
- Transactions per capita

Based on these factors (with a weighting system explained below), the following market areas are a priority for new liquor stores:

Table 2: Priority for New Store Locations – Market Areas

Priority	Store	Market Area
1	21	Harrisville
2	39	St. George
3	24	Ogden
4	23	Roy
5	45	Springville
6	29	Holladay
7	48	Herriman
8	10	Tooele
9	41	Salt Lake City
10	17	Orem
11	15	Cottonwood Heights
12	37	Park City

There have been some changes in the priorities given to market areas in the 2020 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 2021, 2020, and 2018 priorities can be seen in the table below.

Table 3: Comparison of 2021, 2020, and 2018 Priorities by Weighted Rank – Market Areas

Priority	2021 Weighted Rank		2020 Weighted Rank		2018 Weighted Rank	
	Store	Location	Store	Location	Store	Location
1	21	Harrisville	16	Sandy	16	Sandy
2	39	St. George	44	Pleasant Grove	44	Pleasant Grove
3	24	Ogden	31	Draper	40	Riverton
4	23	Roy	40	Riverton	31	Draper
5	45	Springville	21	Harrisville	21	Harrisville
6	29	Holladay	39	St. George	30	Layton
7	48	Herriman	8	Bountiful	15	Cottonwood Heights
8	10	Tooele	30	Layton	24	Ogden
9	41	Salt Lake City	15	Cottonwood Heights	3	West Valley City
10	17	Orem	3	West Valley City	29	Holladay
11	15	Cottonwood Heights	6	Logan	39	St. George
12	37	Park City	24	Ogden	6	Logan

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

Fiscal Impacts to Local Communities from Liquor Stores

Sales per square foot in liquor stores is considerably higher than the average for other types of retail stores. Average sales per square foot for liquor stores in Utah (excluding club stores) are $1,145. 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 higher than that of Costco ($1,118) – a highly sought-after retail chain. However, there is an extreme range in this metric across Utah liquor stores – from a high of $3,512 per square foot to a low of $228 per square foot.

Downtown Considerations

An analysis of key performance metrics also shows 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 and average space were found to be under increased burden. The following table shows the new store and relocation priorities in a side-by-side comparison. Such findings validate the Division's recent trend of obtaining larger properties for new storefronts.

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	21	Harrisville	1	38	Park City
2	39	St. George	2	2	Salt Lake City
3	24	Ogden	3	15	Cottonwood Heights
4	23	Roy	4	9	Murray
5	45	Springville	5	25	Millcreek
6	29	Holladay	6	12	Salt Lake City
7	48	Herriman	7	29	Holladay
8	10	Tooele	8	37	Park City
9	41	Salt Lake City	9	41	Salt Lake City
10	17	Orem	10	1	Salt Lake City
11	15	Cottonwood Heights	11	16	Sandy
12	37	Park City	12	21	Harrisville

Consumer Profile

Demographic trends for Utah show that household sizes are shrinking and that median ages are rising 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. Additionally, tourism and hospitality-centric cities and towns show strong activity.

Table 5 shows ZPFI's estimate of unique customers that shop at state liquor stores. The largest group purchases alcohol very infrequently and is also the youngest group. Note that almost 10 percent of customers spend over $1,000 per year on alcohol, with the average ticket above $40.

Table 5: ZPFI Estimate of Customer Groups

Group	Average Age	Transactions in Two-Year Period	Amount Spent per Person	Percent of Customers	Amount per Transaction
1	51	134	$6,393	2%	$48
2	49	52	$2,172	7%	$42
3	53	207	$16,818	<1%	$81
4	44	5	$169	91%	$34

Demographic Trends and Growth Patterns

This section evaluates growth in demand for retail outlets. The foci are on population growth, location of future growth, and changing demographics. All of these affect future placement of alcoholic beverage outlets.

Statewide Growth Trends

Population

The Gardner Policy Institute estimates the total population for the State of Utah to be 3.3 million currently and almost 4 million by 2031. Most growth is projected to occur in Utah and Salt Lake counties.

Table 6: Population Estimates by County

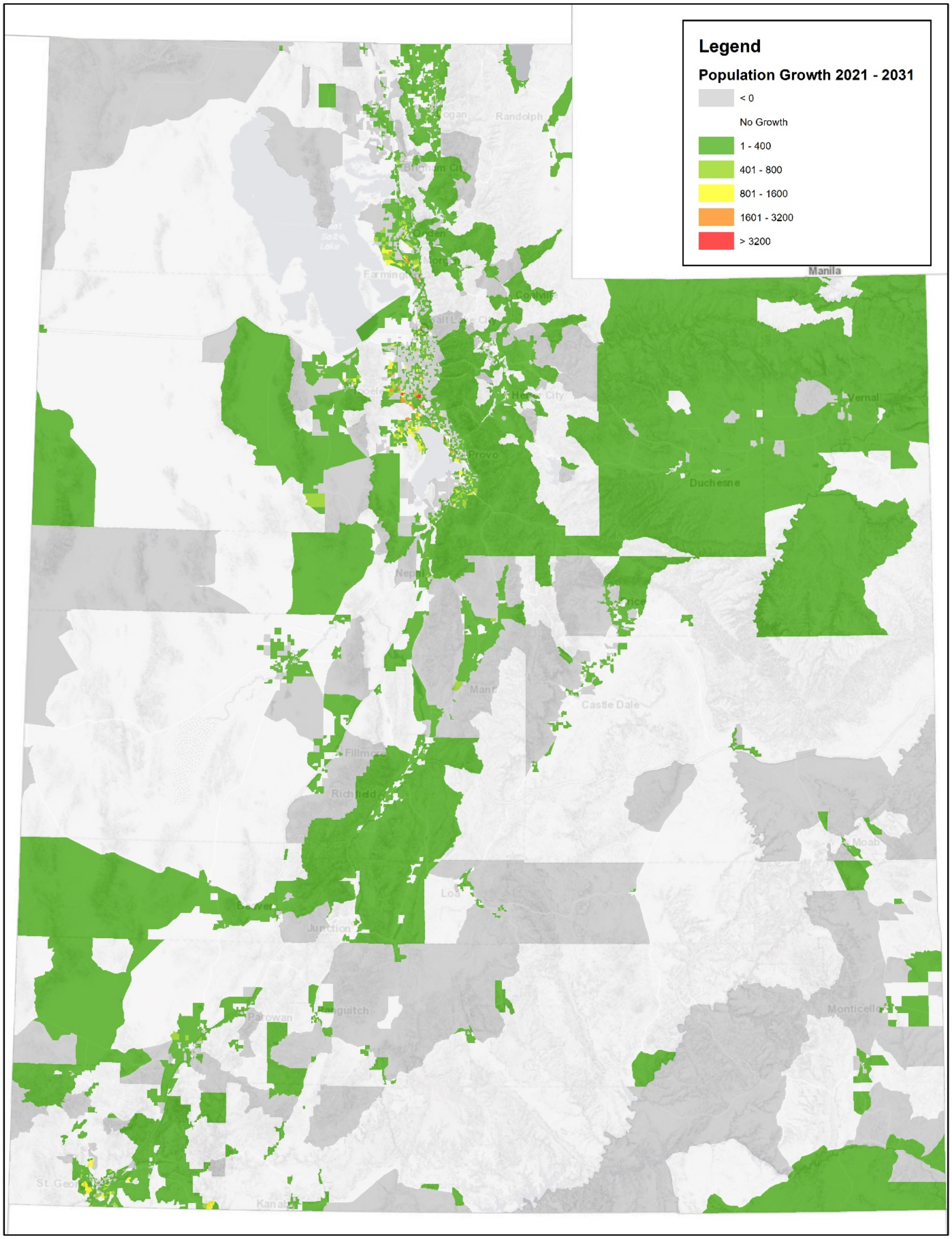
County	2021	2031	Growth 2021-2031
Utah County	697,248	882,227	220,941
Salt Lake County	1,198,374	1,317,382	153,325
Washington County	193,437	258,560	78,607
Davis County	369,757	410,403	50,728
Weber County	271,129	305,802	44,243
Cache County	136,132	161,376	30,235
Tooele County	76,418	95,149	23,029
Wasatch County	37,061	49,398	15,050
Iron County	56,119	64,676	10,681
Summit County	43,553	51,429	9,294
Box Elder County	58,292	64,940	8,292
Sanpete County	31,781	36,662	5,828
Juab County	13,978	18,329	5,307
Uintah County	40,320	44,339	5,228
Morgan County	13,906	17,985	5,012
Carbon County	23,162	25,882	3,438
Duchesne County	23,044	25,636	3,400

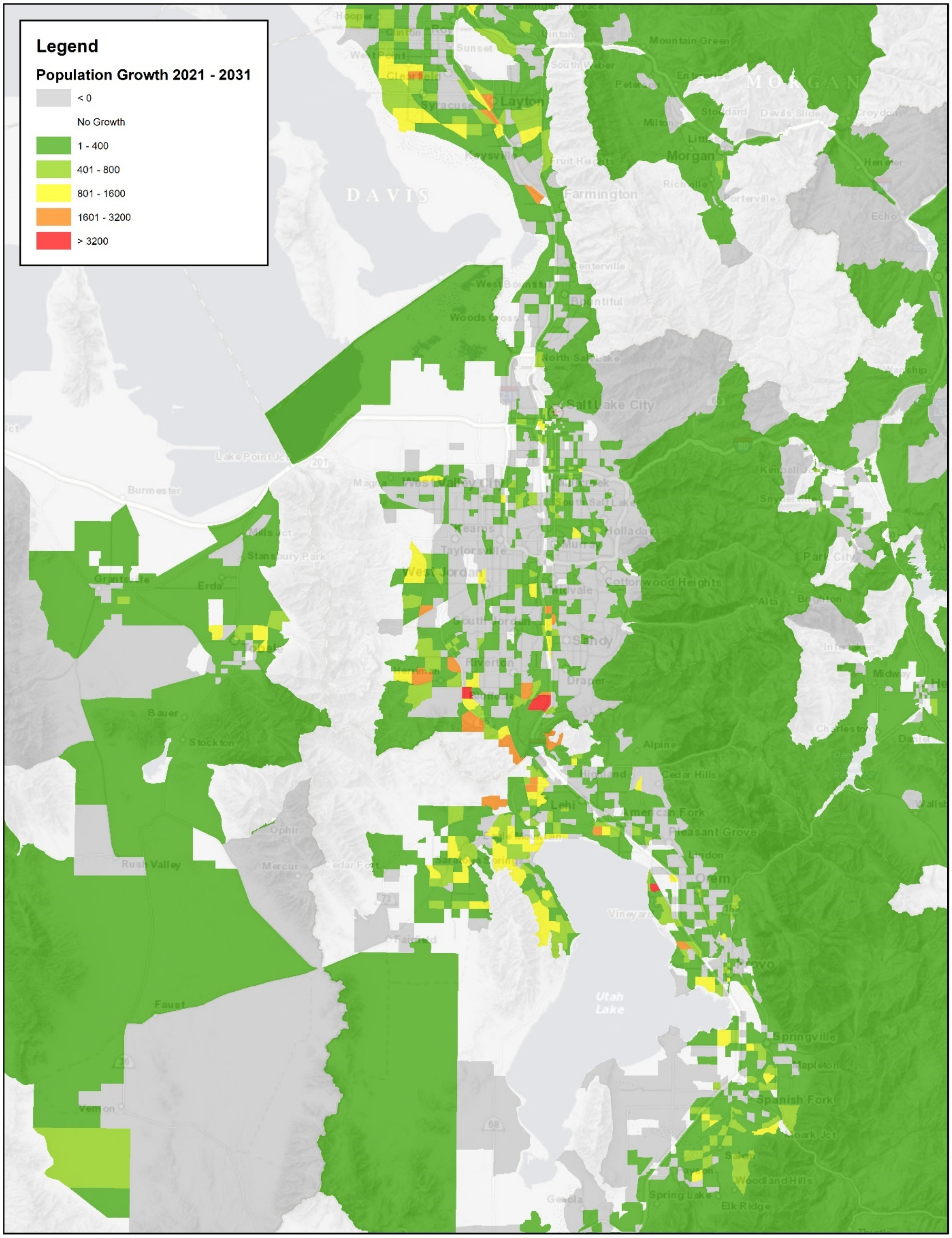
County	2021	2031	Growth 2021-2031
Sevier County	23,430	25,967	3,213
San Juan County	17,305	18,750	1,822
Millard County	13,914	15,132	1,490
Grand County	10,697	11,787	1,375
Kane County	8,291	9,253	1,222
Emery County	11,206	12,103	1,121
Garfield County	5,593	6,205	768
Beaver County	7,152	7,749	735
Wayne County	2,861	3,216	409
Rich County	2,472	2,663	230
Daggett County	1,179	1,320	170
Piute County	1,657	1,801	165
State of Utah Total	**3,389,467**	**3,946,122**	**685,357**

Source: Gardner Policy Institute

The maps on the following page display the projected population growth throughout the State between 2021 and 2031 for individual Traffic Analysis Zones (TAZ).[1] Along the Wasatch Front, growth centers are found along I-15 in Davis County, Utah County, and southern Salt Lake County; western Utah County, and along the western Davis County corridor.

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


Legend
Population Growth 2021 - 2031
< 0
No Growth
1 - 400
401 - 800
801 - 1600
1601 - 3200
> 3200
Randolph
Manila
Provo
Duchesne
Vernal
Castle Dale
Richfield
Junction
Parowan
Monticello


Legend
Population Growth 2021 - 2031
< 0
No Growth
1 - 400
401 - 800
801 - 1600
1601 - 3200
> 3200
DAVIS
Layton
Farmington
Morgan
Bountiful
Salt Lake City
West Jordan
Sandy
Draper
Lehi
American Fork
Pleasant Grove
Orem
Provo
Utah Lake
Springville
Spanish Fork

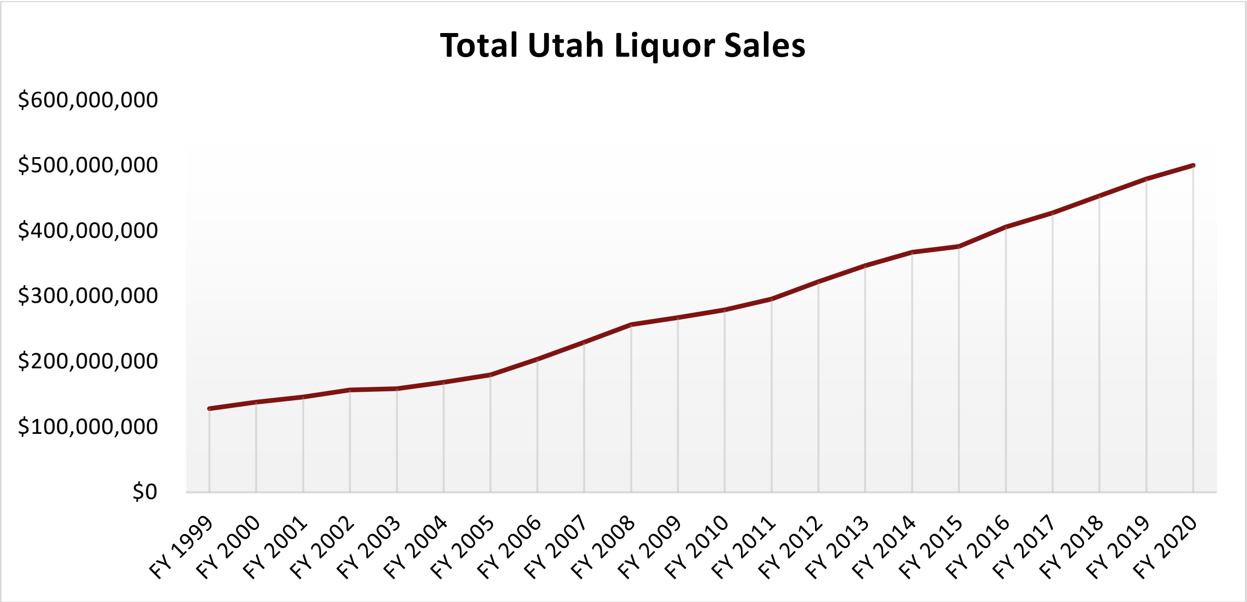
Utah law provides that the State "may not establish a total number of state [liquor] stores that at any time exceeds the number determined by dividing the population of the State by 48,000."[2] Currently there are 49 state liquor stores. Based on an estimated 2021 population of 3,271,616,[3] the State could have up to 68 liquor stores statewide, as shown in the table below. Therefore, State law would permit up to 19 additional liquor stores throughout the State.

Table 7: Allowable Liquor Stores

	2010	2021	2031	2041
Total State Population	2,763,885	3,271,616	3,946,122	4,520,678
Population per Store	48,000	48,000	48,000	48,000
Total Allowable Stores	57	68	82	94
Actual Stores	44	49	49	49
Additional Allowable Stores	**13**	**19**	**33**	**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 6.6 percent annually from FY1998 to FY2020, while the State's population grew by an estimated 1.9 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: United States Census

Table 8: 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
FY2020	$500,212,000

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

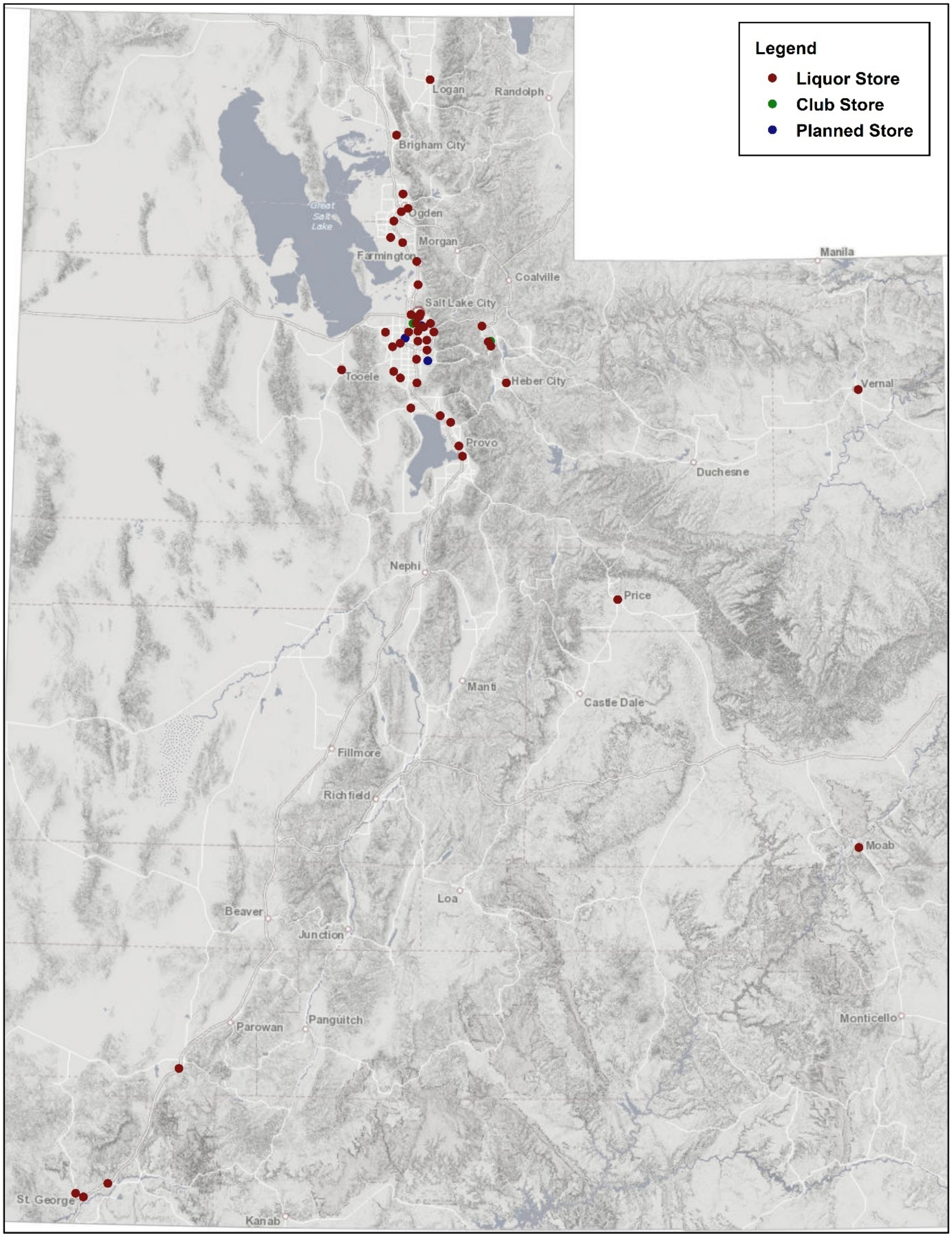
Market Area Analysis

The State of Utah currently has 49 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, and Utah County has five. These are followed by Weber and Summit Counties, with four each. 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 three more stores in the Wasatch Front area.

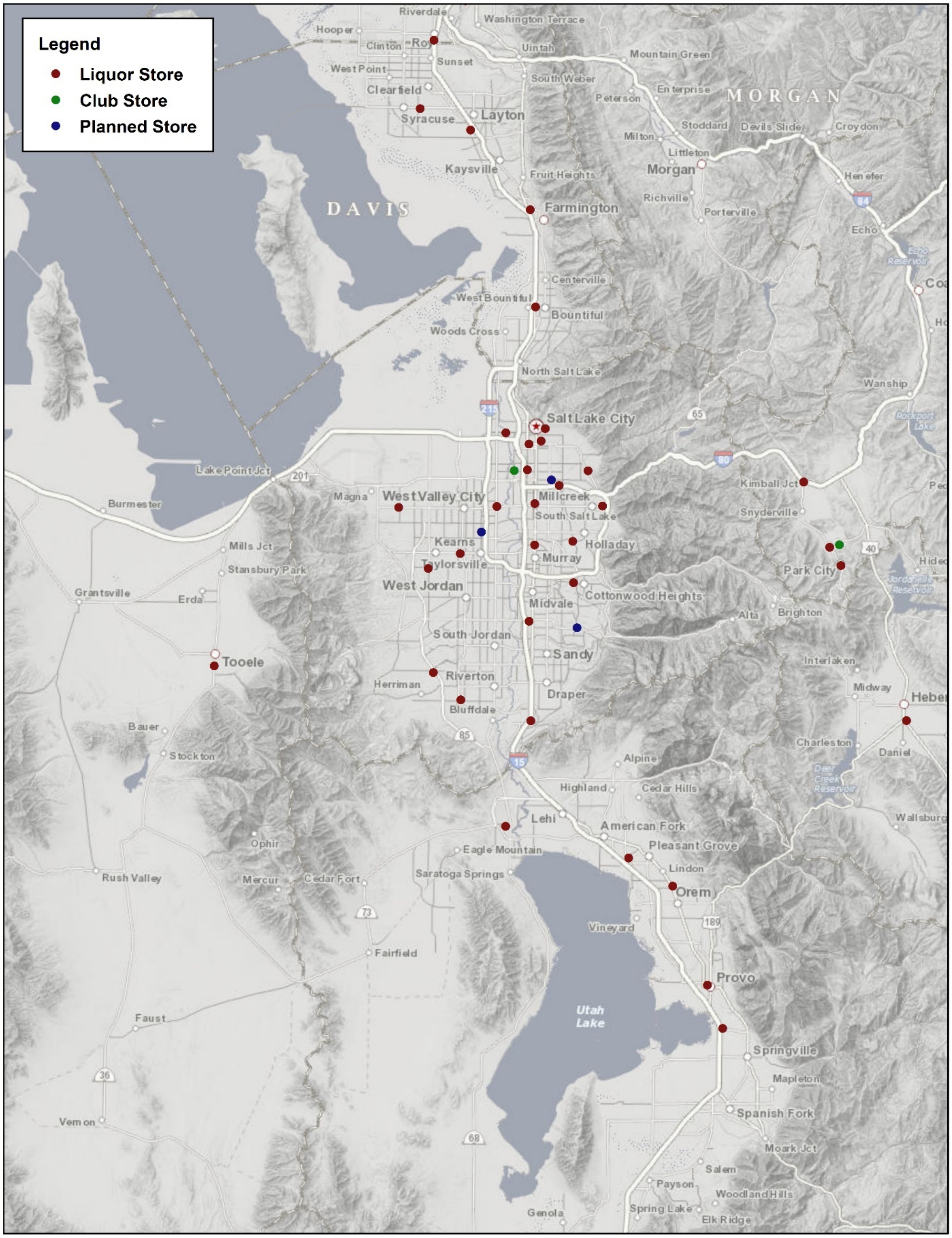
Table 9: Number of Liquor Stores by County

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

County	Liquor Stores	Club Stores	Grand Total
Summit County	3	1	4
Tooele County	1		1
Uintah County	1		1
Utah County	5		5
Wasatch County	1		1
Washington County	3		3
Weber County	4		4
Grand Total	**47**	**2**	**49**



State Liquor Store Locations



State Liquor Store Locations – Wasatch Front

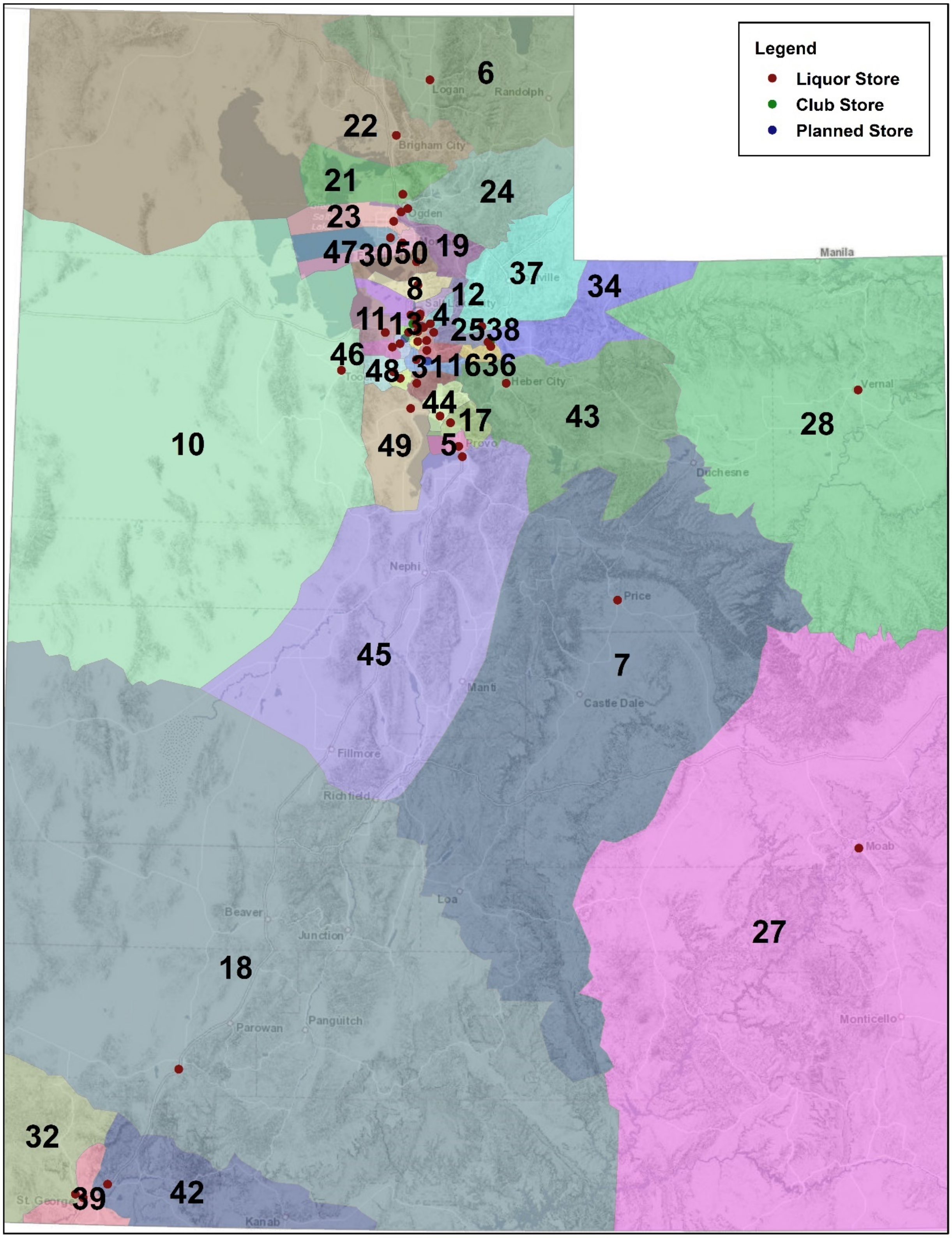
To better understand growth trends for each of the outlets, ZPFI conducted a GIS analysis to determine the market area for each store, which calculated the closest outlet, based on state-generated driving times, for addresses throughout Utah.

The market area for each outlet varies significantly, with some as small as 3.07 square miles (store 41 in Salt Lake City), or as large as 18,398 square miles (store 18 in Cedar City), while the driving times range from a few minutes to more than 2 hours in rural areas.

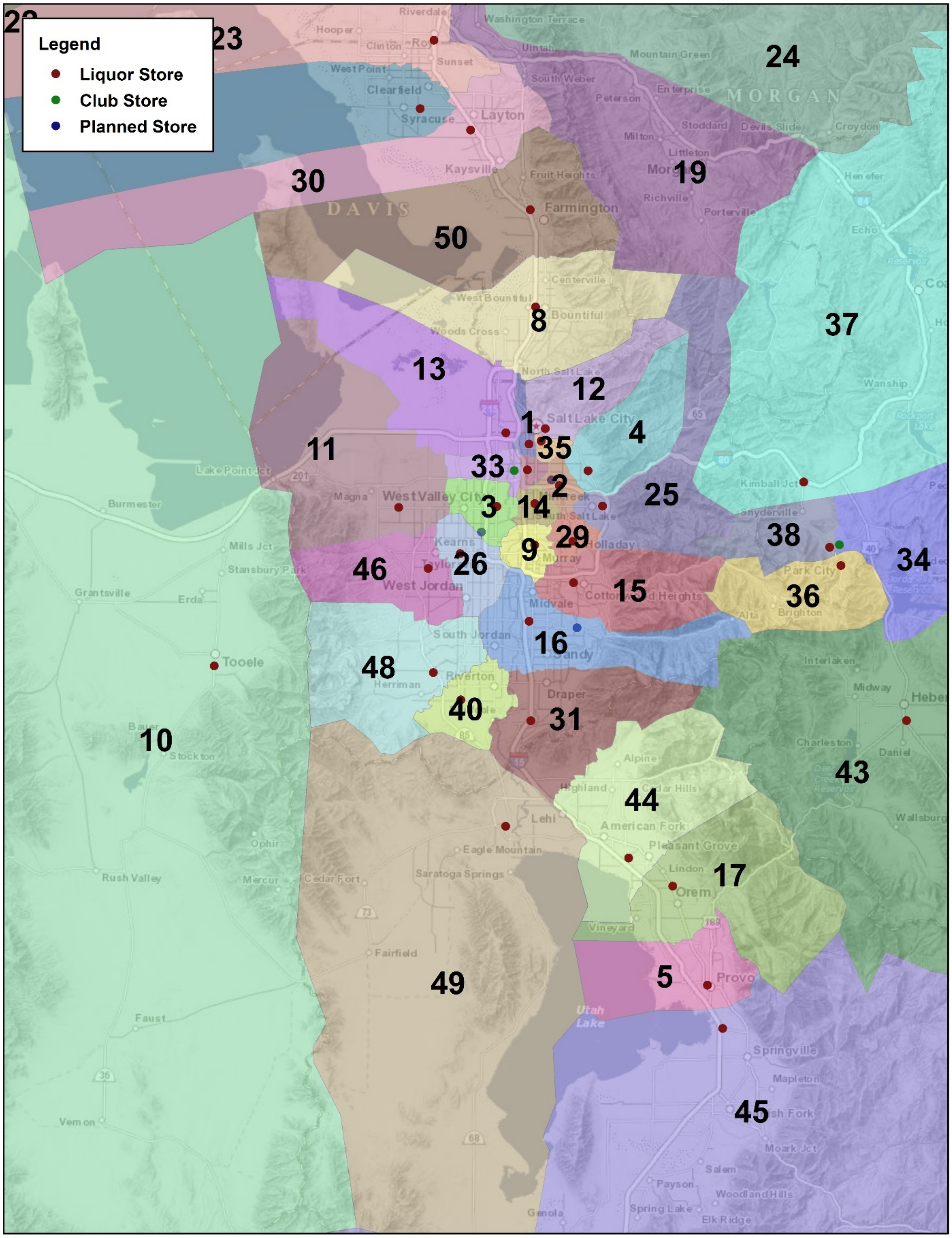
The following table lists the top 12 stores with the largest market areas. The largest market areas cover more rural areas and do not always coincide with a larger population.

Table 10: Market Area by Square Miles

Store	Street Address	City	Market Area (Sq Miles)
18	1580 S Providence Center Dr.	Cedar City	18,398
27	55 West 200 South	Moab	15,313
10	433 North Main	Tooele	11,229
7	50 North 100 West	Price	9,674
28	675 East Main	Vernal	7,120
22	43 South 100 West	Brigham City	5,902
45	1551 North 1750 West	Springville	4,894
6	75 West 400 North	Logan	1,991
43	262 East Gatway Dr.	Heber City	1,984
42	202 North Foothill Canyon Dr.	Hurricane	1,316
32	929 West Sunset Blvd.	St. George	1,128
37	1612 Ute Blvd.	Park City	891
		Average – All Stores	**1,791**
		Average – Top 12 Stores	**6,654**



Market Area by State Liquor Store



Market Areas in the Wasatch Front

The above market areas were created using Utah's street network analysis dataset from the Utah Geospatial Research Center (UGRC). Using Department of Alcoholic Beverage Control storefronts as destinations and addresses throughout the State as embarkation points, ZPFI ran a computationally intensive program to determine the closest store to each address point in a UGRC sample. The resultant constitutes the stores' market area.

These simulated market areas were 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
- 2021 population
- 2031 population
- Absolute population growth 2021-2031
- 2021 population density
- Population density absolute growth 2021-2031
- Household incomes
- Per capita incomes
- Median age
- 2021 employment
- 2031 employment
- 2021 employment density
- March 2020 – Feb. 2021 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, ZPFI determined that there are six primary factors that determine the priority for adding additional stores in certain markets. The factors selected are the following:

- 2021 population
- 2031 population
- Absolute population growth 2021-2031
- Population density 2021
- 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 there, the store is designed to sell to businesses rather than individual customers. Even though COVID-19 caused some bars and similar companies to close temporarily, the function of club stores will not change. The potential for additional club stores is analyzed in a later section of this report.

2021 Population

Stores with large populations are all located along the Wasatch Front. The largest populations served are in the Springville, Sandy, and Logan market areas. The Springville market area incorporates a large portion of southern Utah County, which is why the market area has the population for over four and a half stores.

Table 11: Top Stores by 2021 Population in Market Area*

Rank	Store	City	2021 Population	Current Allowable Stores in Market Area
1	45	Springville	221,488	4.61
2	16	Sandy	155,004	3.23
3	06	Logan	137,462	2.86
4	44	Pleasant Grove	128,149	2.67
5	49	Saratoga Springs	125,583	2.62
6	05	Provo	125,367	2.61
7	26	Taylorsville	117,620	2.45
8	17	Orem	112,561	2.35
9	30	Layton	107,731	2.24
10	21	Harrisville	100,745	2.10
11	08	Bountiful	100,395	2.09
12	23	Roy	98,774	2.06
		Average – Top 12 Stores	**127,573**	
		Average – All Stores	**70,517**	

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

While current population is important, a major factor in determining where new stores should be located is where households will be concentrated in the future.

2031 Population

The list of stores with large projected populations in 2031 is very similar to that of 2021. Major differences, as expected, are that growth in Utah County stores generally exceeds that of Salt Lake County stores.

Table 12: Top Stores by 2031 Population in Current Market Area*

Rank	Store	City	2031 Population	Allowable Stores
1	45	Springville	280,553	5.84
2	49	Saratoga Springs	210,176	4.38
3	16	Sandy	168,115	3.50
4	6	Logan	162,517	3.39
5	5	Provo	144,778	3.02
6	44	Pleasant Grove	141,563	2.95
7	17	Orem	128,073	2.67
8	30	Layton	124,725	2.60
9	26	Taylorsville	116,214	2.42
10	21	Harrisville	115,618	2.41
11	39	St. George	114,334	2.38
12	48	Herriman	110,007	2.29
		Average – Top 12 Stores	**151,389**	
		Average – All Stores	**82,189**	

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

Absolute Population Growth, 2021-2031

The list of top stores based on absolute population growth between 2021 and 2031 also compares to the list of top stores based on 2031 population, with Saratoga Springs and Springville listed in the top two for both factors. A notable store is Tooele, which is not ranked highly in terms of current population (despite being third in market area). This reflects a trend of moving west where possible as municipalities along the Wasatch Front face shortages of housing.

Other stores with higher projected population growth outside of the Wasatch Front include Logan, St. George, and Hurricane.

Table 13: Top Stores by Absolute Population Growth, 2021-2031

Rank	Store	City	Absolute Pop. Growth 2021-2031	Additional Allowable Stores by Pop. Growth 2021-2031
1	49	Saratoga Springs	84,594	1.76
2	45	Springville	59,065	1.23
3	39	St. George	28,197	0.59
4	31	Draper	25,711	0.54
5	6	Logan	25,055	0.52
6	10	Tooele	21,203	0.44
7	48	Herriman	19,647	0.41
8	5	Provo	19,411	0.40
9	42	Hurricane	19,082	0.40
10	30	Layton	16,994	0.35
11	32	St. George	16,281	0.34
12	1	Salt Lake City	16,063	0.33
		Average – Top 12 Stores	**29,275**	
		Average – All Stores	**11,672**	

Population Density, 2021

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 similar populations to other areas but are 95 times smaller than the Utah average in terms of square miles. Note that only one store (#12 in Provo) is included in this list from outside of Salt Lake County. Understandably, this is the case because Utah County is both less populous than Salt Lake County and contains fewer stores.

Table 14: Top Stores by Population Density, 2021

Rank	Store	City	2021 Population	Square Miles	Pop. Density (per Sq. Mile)
1	35	Salt Lake City	33,084	3.25	10,172
2	2	Salt Lake City	44,120	6.54	6,742
3	1	Salt Lake City	28,919	4.86	5,953
4	26	Taylorsville	117,620	20.18	5,828
5	14	Salt Lake City	35,215	6.28	5,604

Rank	Store	City	2021 Population	Square Miles	Pop. Density (per Sq. Mile)
6	41	Salt Lake City	16,296	3.07	5,308
7	29	Holladay	40,853	7.80	5,236
8	3	West Valley City	76,862	15.40	4,990
9	9	Murray	51,672	10.42	4,960
10	40	Riverton	72,850	23.75	3,067
11	16	Sandy	155,004	67.80	2,286
12	5	Provo	125,367	57.31	2,188
		Average – Top 12 Stores	**66,488**	**18.89**	**5,194**
		Average – All Stores	**70,517**	**1,791**	**1,636**

Bottles per Hour

Bottles per hour is the key metric used by the ABC to gauge store performance. The highest performing stores this year sold between 63 and 84 bottles per hour worked. ZPFI notes that keeping expenses low is an important element in maintaining financial stability. While the bottles per hour metric varies through locations across the State, store managers have done well at keeping the ratio of revenue to expenses comparable throughout all stores.

Table 15: Top Stores by Bottles per Hour

Rank	Store	City	Bottles per Hour
1	37	Park City	83.52
2	25	Millcreek	80.25
3	24	Ogden	77.33
4	38	Park City	76.41
5	8	Bountiful	74.83
6	12	Salt Lake City	73.91
7	44	Pleasant Grove	72.22
8	21	Harrisville	71.07
9	29	Holladay	68.55
10	41	Salt Lake City	67.09
11	39	St. George	64.93
12	23	Roy	63.61
		Average – Top 12 Stores	**72.81**
		Average – All Stores	**55.24**

Transactions per Capita

Transactions per capita is also a good indicator of store performance. Stores with the most transactions per capita tend to fit one of two criteria: tourist areas and densely populated areas. Thus, Park City performs extremely well as travelers come from across the state and country. Salt Lake City does well in this metric as well, albeit for different reasons than Park City.

ZPFI also recognizes that all transactions were down throughout 2020 due to the COVID-19 pandemic. As a result, the transactions per capita metric has decreased statewide as well.

Table 16: Top Stores by Transactions per Capita

Rank	Store	City	2021 Population	Transactions per Capita
1	38	Park City	6,642	31.5
2	36	Park City	2,056	17.2
3	41	Salt Lake City	16,296	10.6
4	37	Park City	22,099	9.3
5	12	Salt Lake City	23,863	8.8
6	25	Millcreek	26,746	8.2
7	1	Salt Lake City	28,919	7.7
8	2	Salt Lake City	44,120	6.1
9	29	Holladay	40,853	6.1
10	9	Murray	51,672	5.5
11	13	Salt Lake City	42,807	5.1
12	27	Moab	28,912	4.8
		Average – Top 12 Stores	**27,915**	**10.1**
		Average – All Stores	**70,517**	**4.5**

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 the six primary factors previously listed.

Step 2: Weights based on priority were assigned to each of the factors. The Department of Alcoholic Beverage Control outlined the following weights:

Table 17: Analysis Factors by Weight

Factor	Weight
Population	**50%**
Population – 2021	20%
Population – 2031	10%
Absolute Population Growth 2021-2031	10%
Population Density – 2021	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.

Table 18: Store Priorities based on Weighted Ranks for 2021

Priority	Store	City	Weighted Rank
1	44	Pleasant Grove	14.0
2	21	Harrisville	14.6
3	39	St. George	15.2
4	8	Bountiful	15.9
5	31	Draper	16.3
6	16	Sandy	16.9
7	24	Ogden	17.8
8	3	West Valley City	18.6
9	23	Roy	19.0
10	45	Springville	19.2
11	30	Layton	19.5
12	29	Holladay	19.6
13	48	Herriman	20.3
14	10	Tooele	20.3
15	41	Salt Lake City	20.3
16	17	Orem	20.5
17	15	Cottonwood Heights	20.5
18	37	Park City	21.1
19	25	Millcreek	21.8
20	12	Salt Lake City	22.2
21	38	Park City	22.5
22	40	Riverton	22.8
23	18	Cedar City	23.1
24	46	West Valley City	23.1
25	2	Salt Lake City	23.4
26	6	Logan	24.1
27	5	Provo	24.2
28	26	Taylorsville	24.2
29	13	Salt Lake City	24.4
30	43	Heber City	24.5
31	19	Ogden	24.5
32	42	Hurricane	24.7
33	9	Murray	25.5
34	11	Magna	26.1
35	49	Saratoga Springs	26.5
36	1	Salt Lake City	27.9
37	47	Syracuse	28.0
38	14	Salt Lake City	28.7
39	27	Moab	29.8
40	32	St. George	30.5
41	4	Salt Lake City	30.7
42	35	Salt Lake City	31.9
43	28	Vernal	34.9

Priority	Store	City	Weighted Rank
44	22	Brigham City	35.0
45	36	Park City	36.3
46	50	Farmington	38.5
47	7	Price	38.6

There are currently plans to add three more stores along the Wasatch Front. Additionally, very little information and data are available for the two newest stores (Saratoga Springs and Farmington). The list below takes some assumptions of overlapping market area of new stores into account, placing the stores close to new/planned stores at the bottom – for example, Sandy is placed near the bottom because of the new store coming to the area. Pleasant Grove is placed near the bottom as well due to the small sample size of data from the Saratoga Springs store.

Table 19: Store Priorities with Consideration for New/Planned Stores

Priority	Store	City	Weighted Rank
1	21	Harrisville	14.6
2	39	St. George	15.2
3	24	Ogden	17.8
4	23	Roy	19.0
5	45	Springville	19.2
6	29	Holladay	19.6
7	48	Herriman	20.3
8	10	Tooele	20.3
9	41	Salt Lake City	20.3
10	17	Orem	20.5
11	15	Cottonwood Heights	20.5
12	37	Park City	21.1
13	12	Salt Lake City	22.2
14	38	Park City	22.5
15	18	Cedar City	23.1
16	46	West Valley City	23.1
17	6	Logan	24.1
18	5	Provo	24.2
19	26	Taylorsville	24.2
20	13	Salt Lake City	24.4
21	43	Heber City	24.5
22	19	Ogden	24.5
23	42	Hurricane	24.7
24	11	Magna	26.1
25	49	Saratoga Springs	26.5
26	1	Salt Lake City	27.9
27	47	Syracuse	28.0
28	14	Salt Lake City	28.7
29	27	Moab	29.8
30	32	St. George	30.5
31	4	Salt Lake City	30.7

Priority	Store	City	Weighted Rank
32	35	Salt Lake City	31.9
33	28	Vernal	34.9
34	22	Brigham City	35.0
35	36	Park City	36.3
36	50	Farmington	38.5
37	7	Price	38.6
38	25	Millcreek	21.8
39	2	Salt Lake City	23.4
40	31	Draper	16.3
41	16	Sandy	16.9
42	3	West Valley City	18.6
43	9	Murray	25.5
44	8	Bountiful	15.9
45	30	Layton	19.5
46	44	Pleasant Grove	14.0
47	40	Riverton	22.8

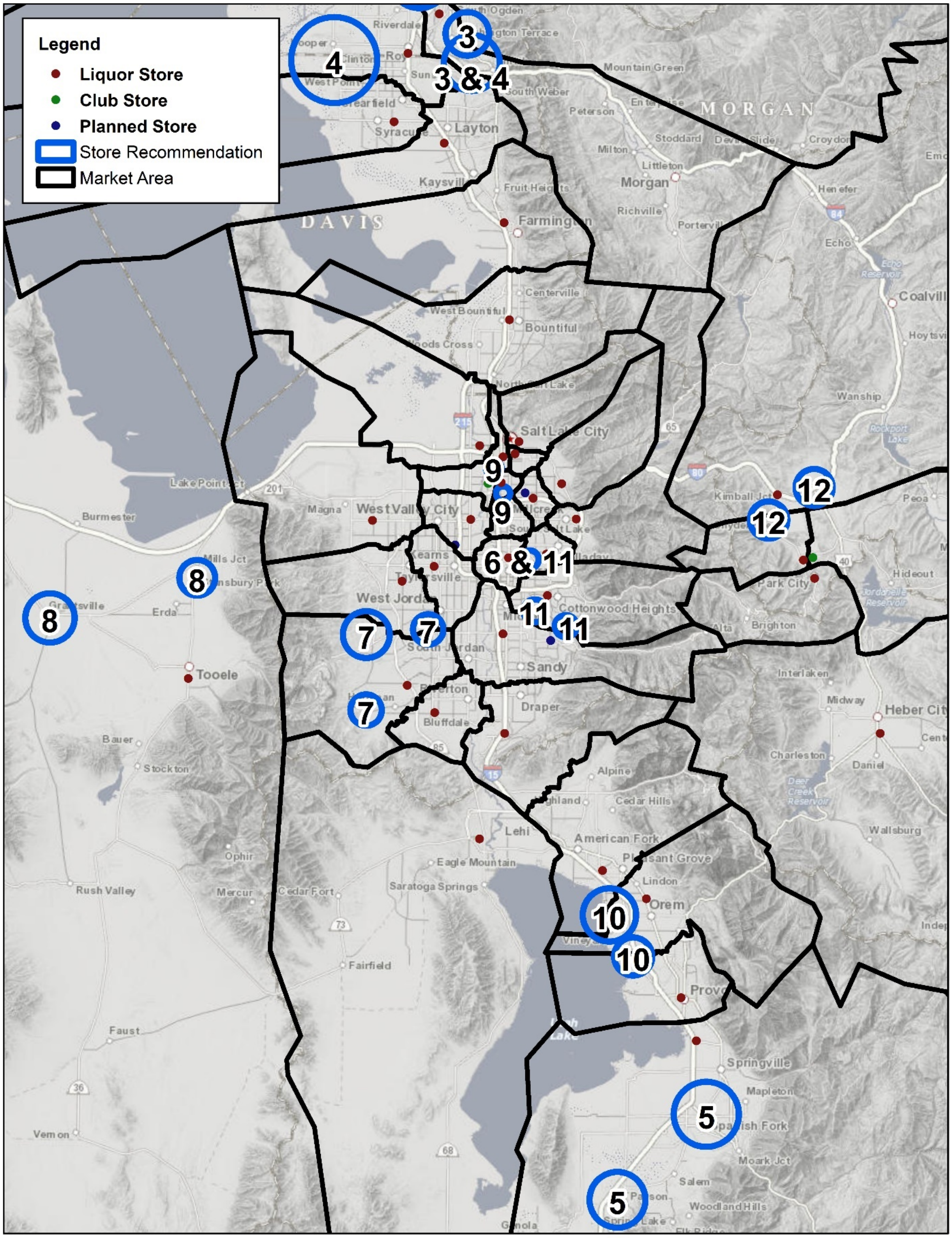
Since 2018, there have been major changes in the ranking of areas for new stores. Most of this has been driven by the addition of new stores – the Saratoga Springs store takes away from both Sandy and Pleasant Grove market areas. Despite the changes, Harrisville has been in the top five for consideration since 2018, and other constants among the top 12 include St. George, Cottonwood Heights, and Ogden.

Table 20: Comparison of 2021, 2020, and 2018 Priorities by Weighted Rank

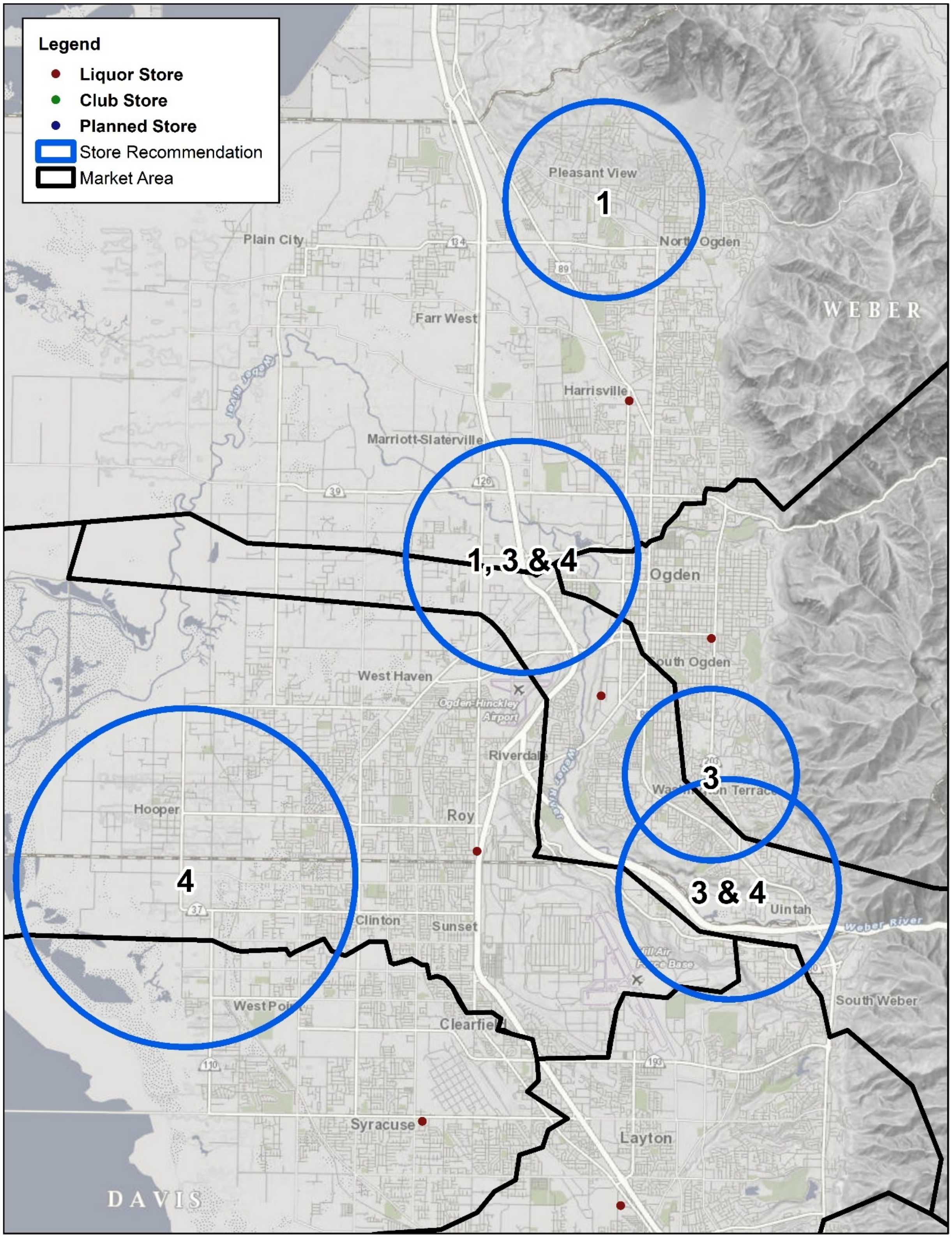
Priority	2021 Weighted Rank	2020 Weighted Rank	2018 Weighted Rank
1	Harrisville	Sandy	Sandy
2	St. George	Pleasant Grove	Pleasant Grove
3	Ogden	Draper	Riverton
4	Roy	Riverton	Draper
5	Springville	Harrisville	Harrisville
6	Holladay	St. George	Layton
7	Herriman	Bountiful	Cottonwood Heights
8	Tooele	Layton	Ogden
9	Salt Lake City	Cottonwood Heights	West Valley City
10	Orem	West Valley City	Holladay
11	Cottonwood Heights	Logan	St. George
12	Park City	Ogden	Logan

Rather than understanding the above list to mean that the next store should be developed in Springville, the astute observer should note that the area covered by Store 45 in Springville would serve a future store well. This could be from Spanish Fork, Payson, or another growing community.

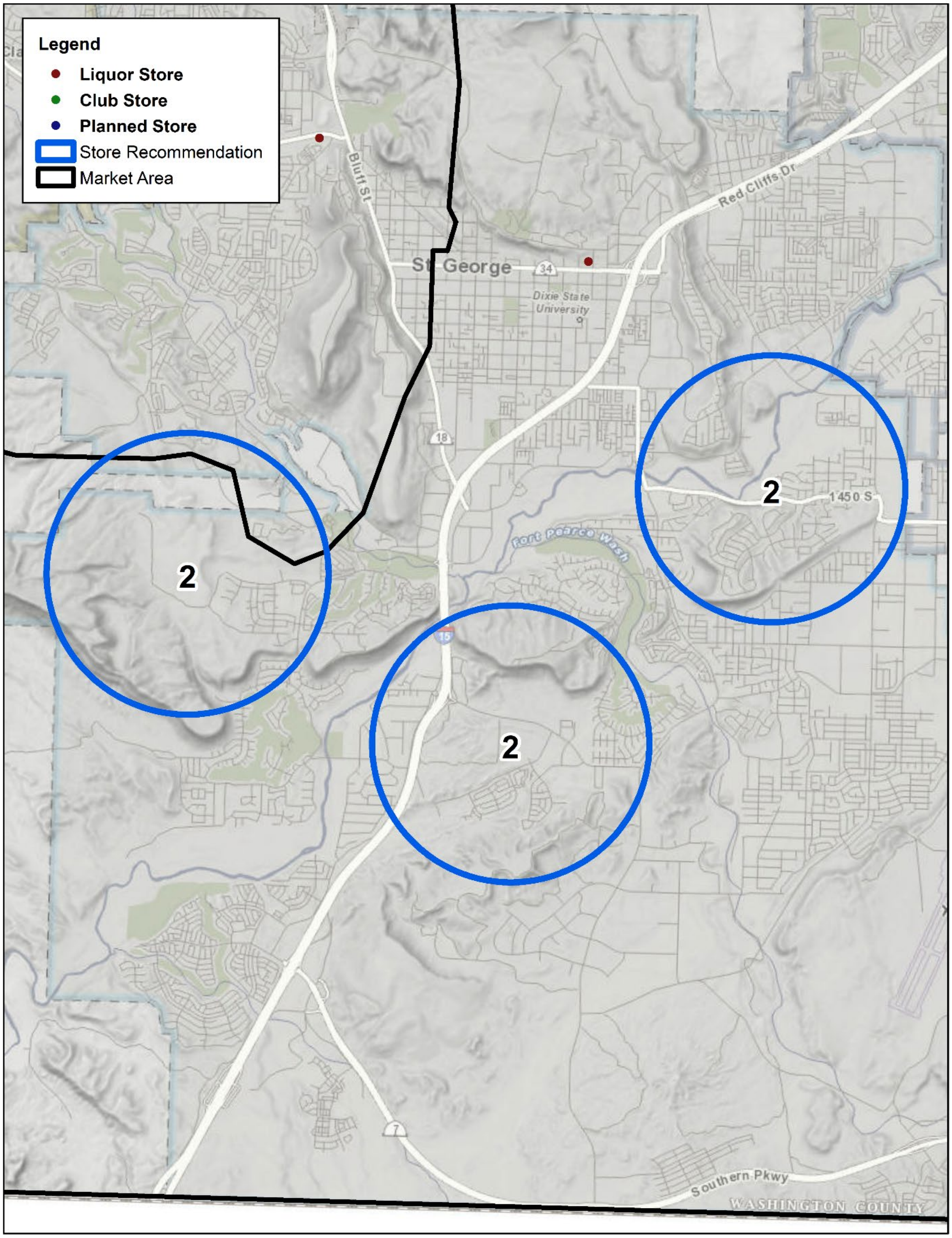
The following maps show recommended store locations for additional stores in the top 12 market areas. The general site recommendations, which are indicated by blue circles, are based on projected population growth within the market area of each store and are only general recommendations for new store locations. Actual store locations may vary based on real estate availability and the closest municipalities for the needed geographic area. Additionally, ZPFI notes that a strategically placed store can serve multiple communities effectively.



Store Recommendations – Wasatch Front



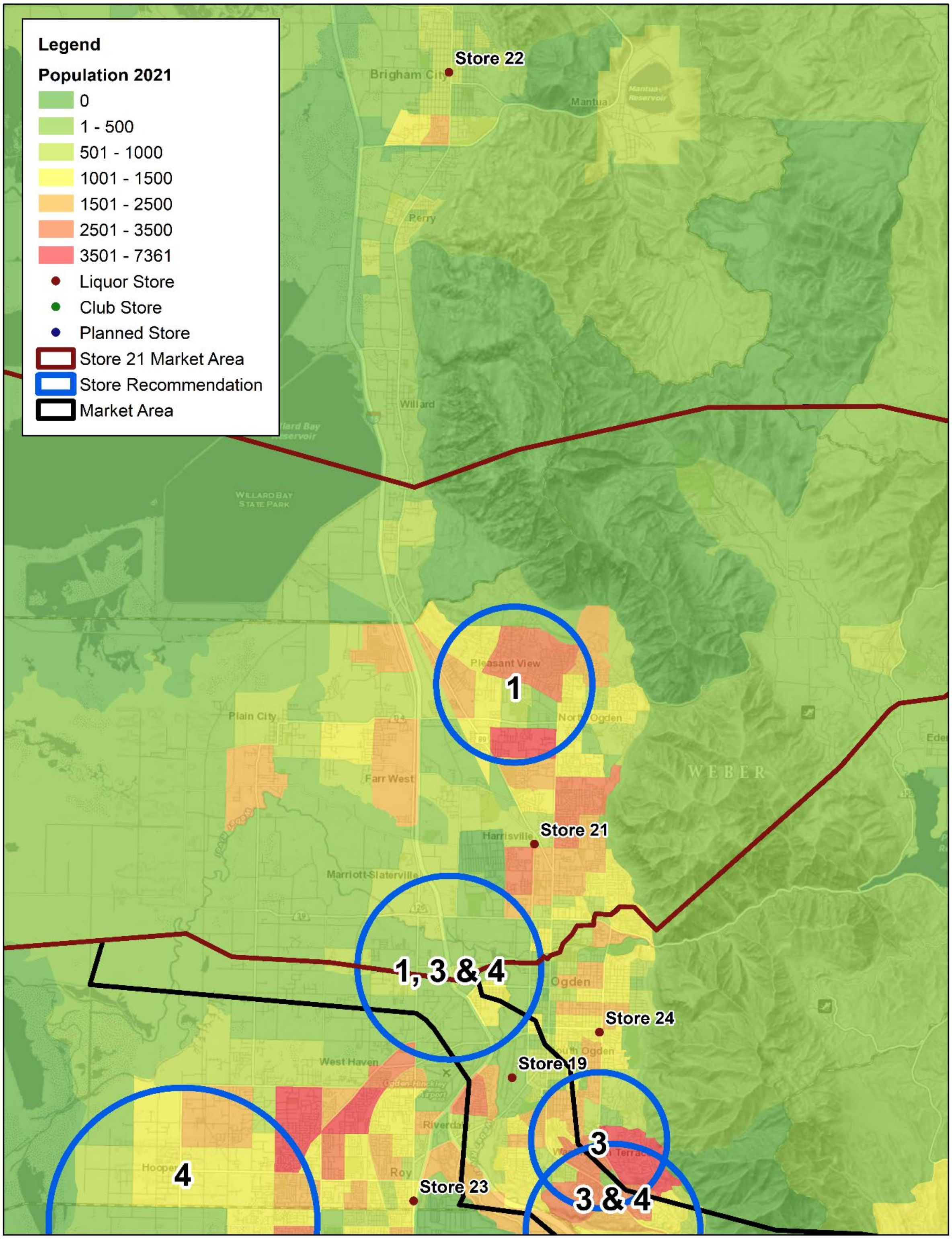
Store Recommendations – Davis and Weber



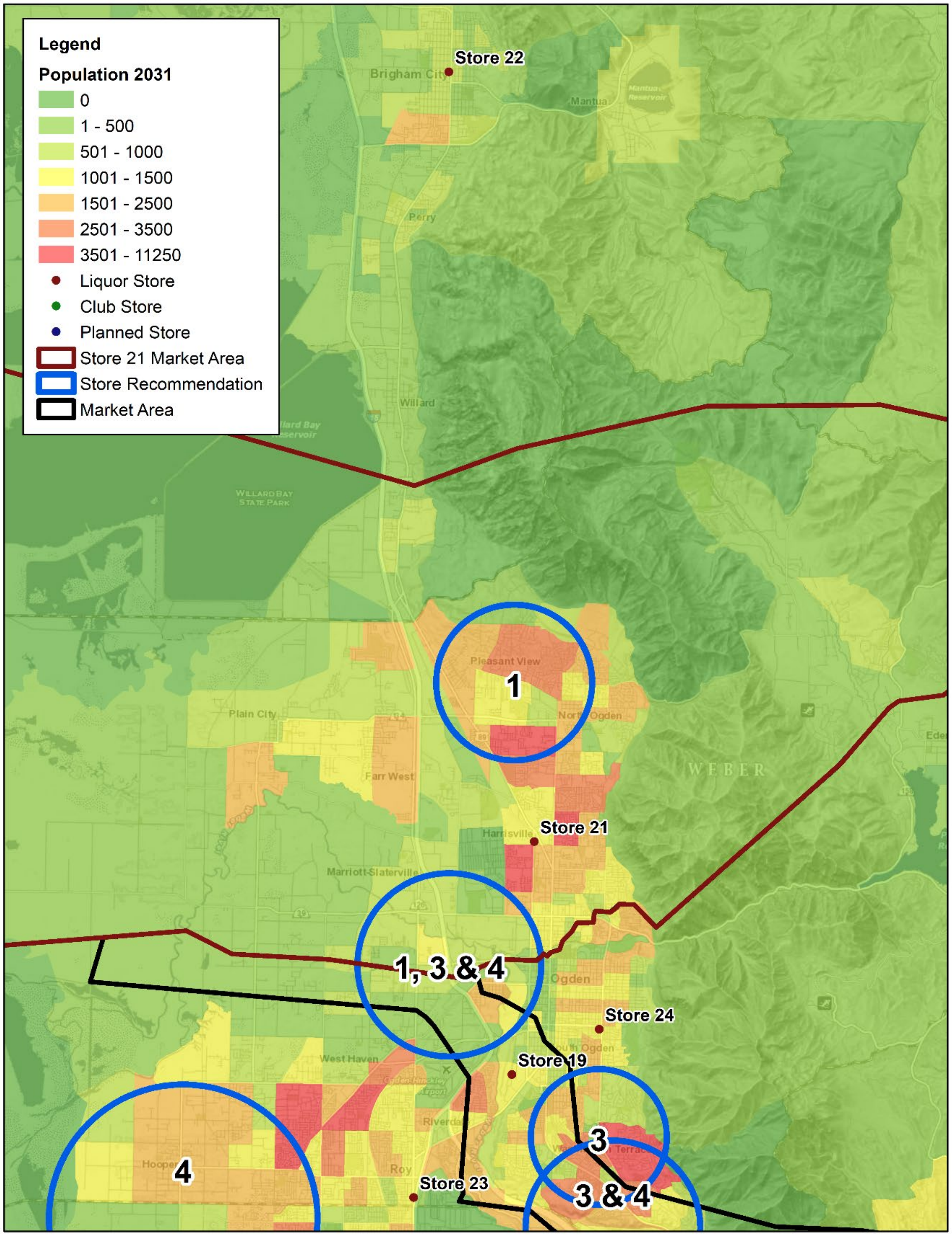
Store Recommendations – St. George Area

Priority 1: Store 21 - Harrisville

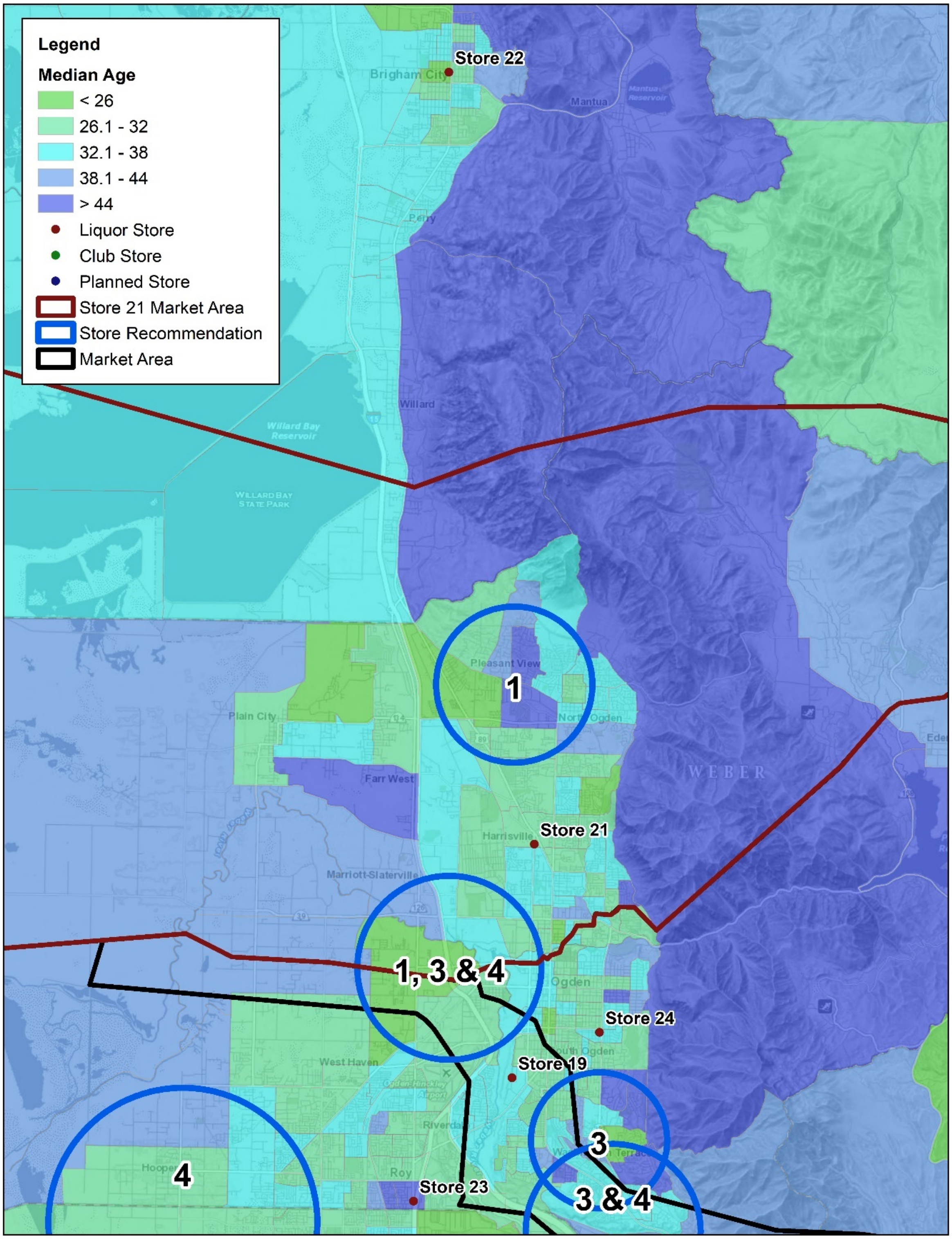
Store 16 is ranked 10th overall in 2021 population and 2031 projected population. North of the store is a good location based off population density, but a new store to the south could help with multiple needs. Harrisville also ranks 8th in bottles per hour, which is better than most non-club stores.



Population distribution in 2031 will be similar to that of this year. There is more projected growth to the west as well, which could come into consideration in the future.

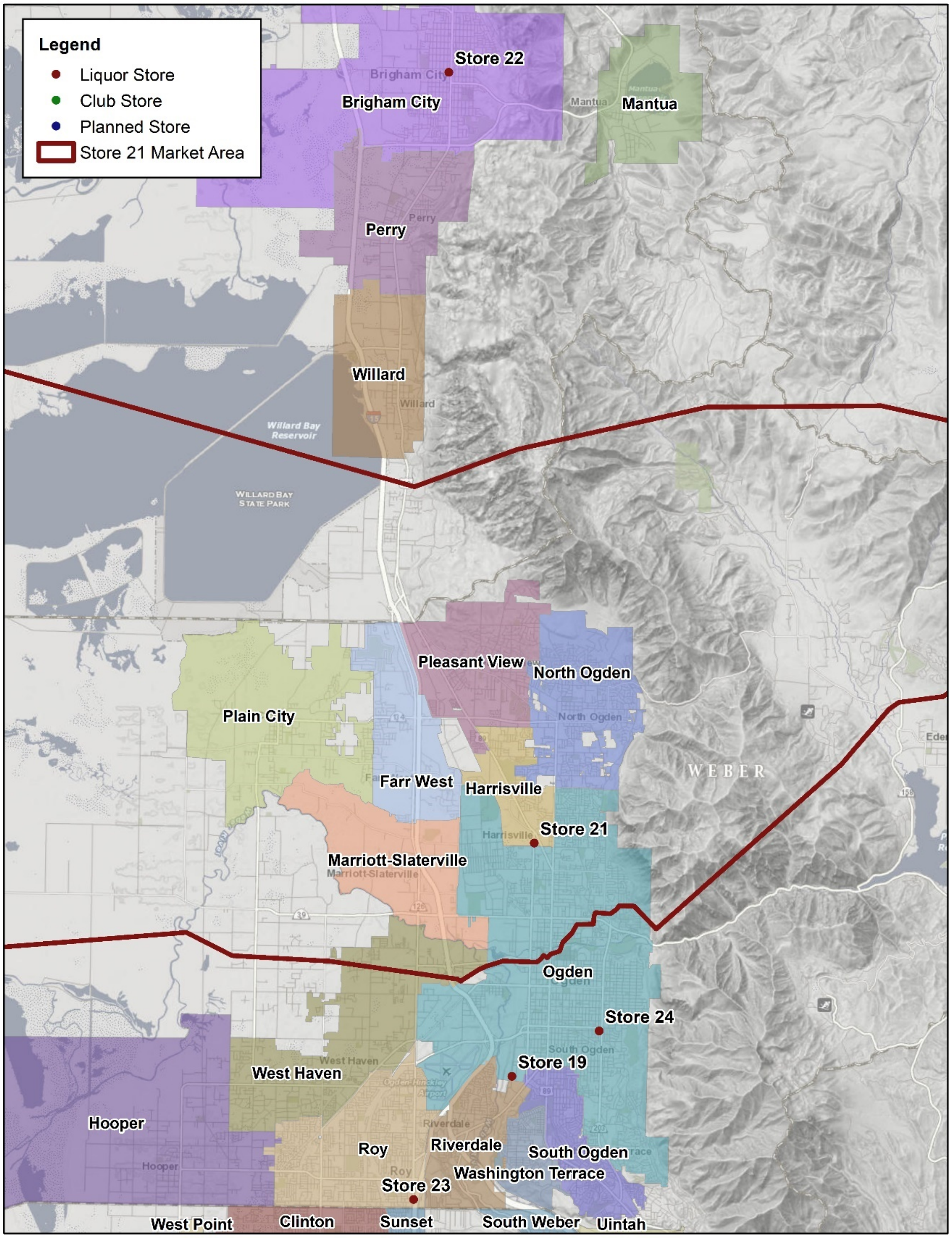


With additional data on higher age groups purchasing more alcoholic beverages, the Pleasant View area seems an excellent locale for a future store. Additionally, household incomes are found to be higher in this area.



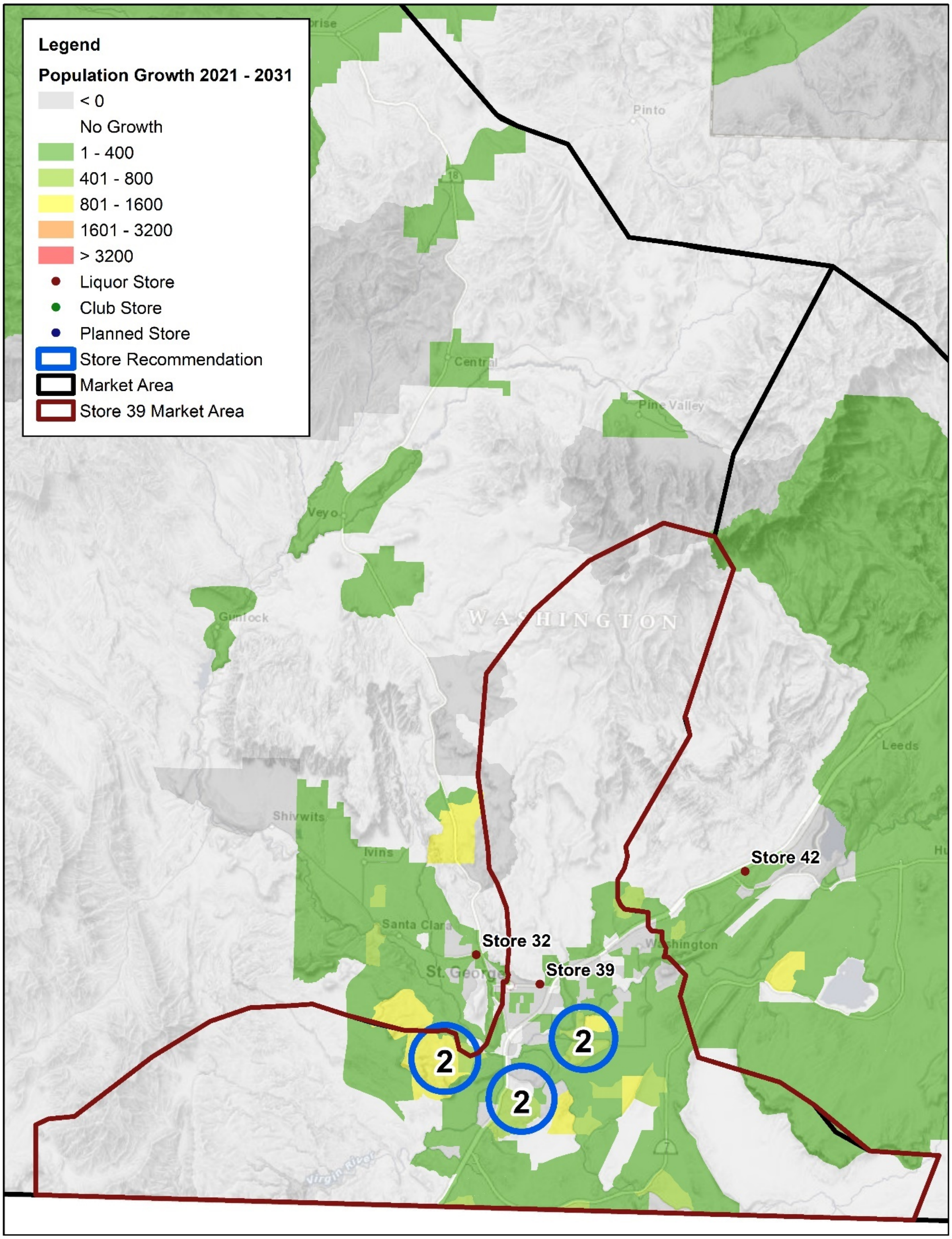
Municipalities located in store 21's market area include:

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

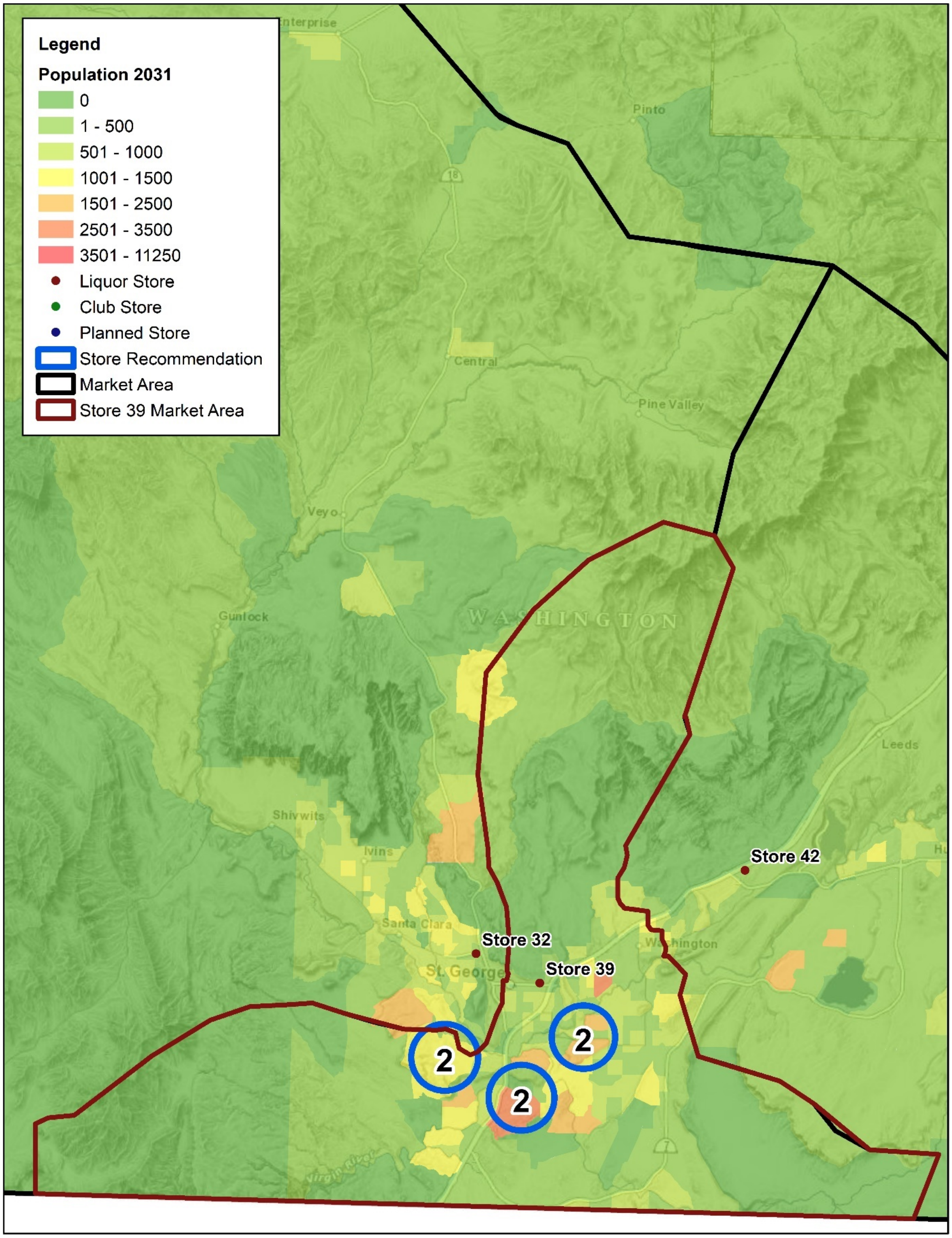


Priority 2: Store 39 – St. George

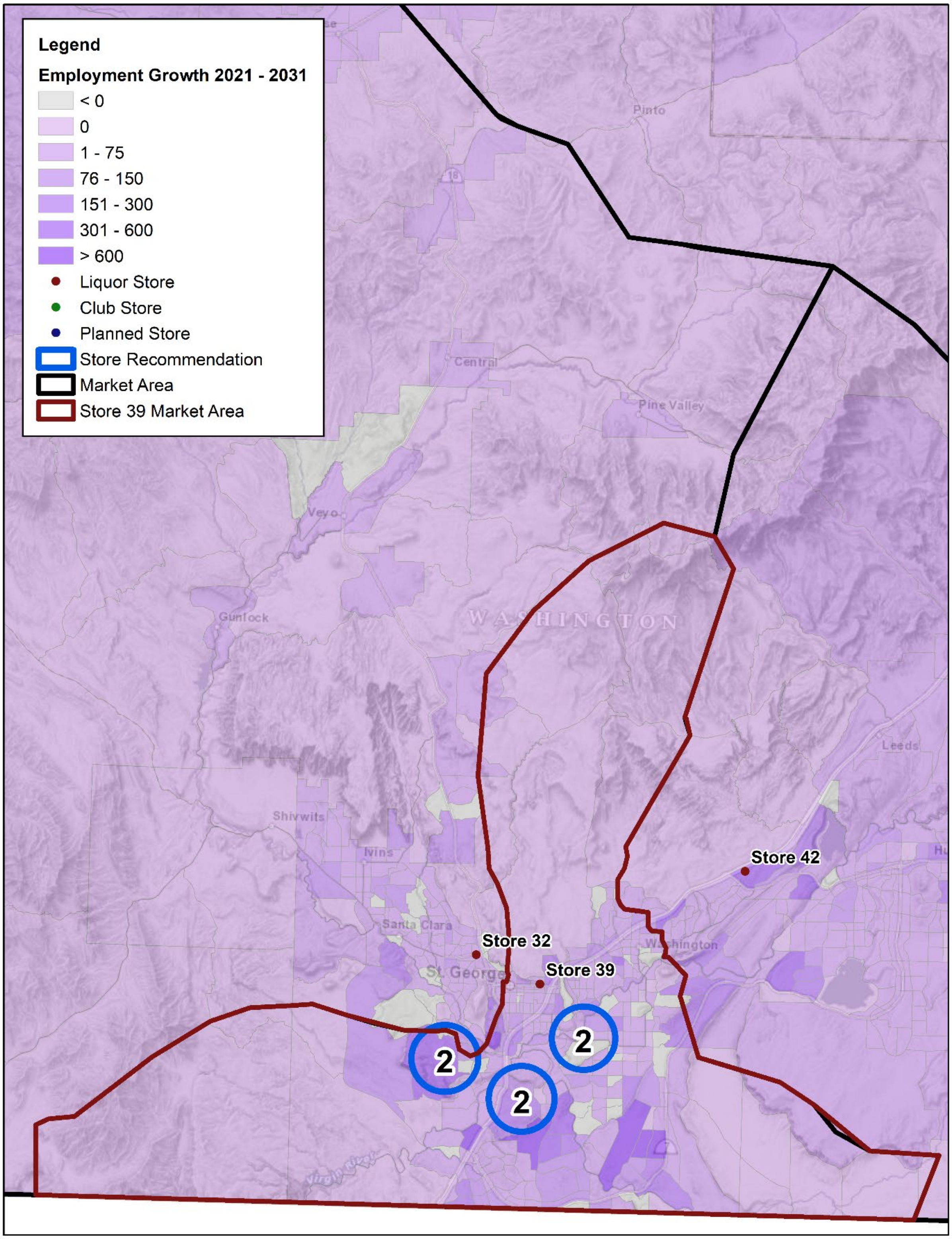
Store 39 in St. George ranks 3rd in population growth from 2021 to 2031. Growth in the area is expected to be highly concentrated in the southern region of the City. As shown below, most of the growth in the market areas of stores 32, 39, and 42 is within the boundary of store 39.



This store also ranks 11th in expected population for the year 2031. This is largely due to the building's proximity to larger growth areas. A store further south could capture a lot of the new growth in the area and help alleviate future pressures on stores 32 and 39.

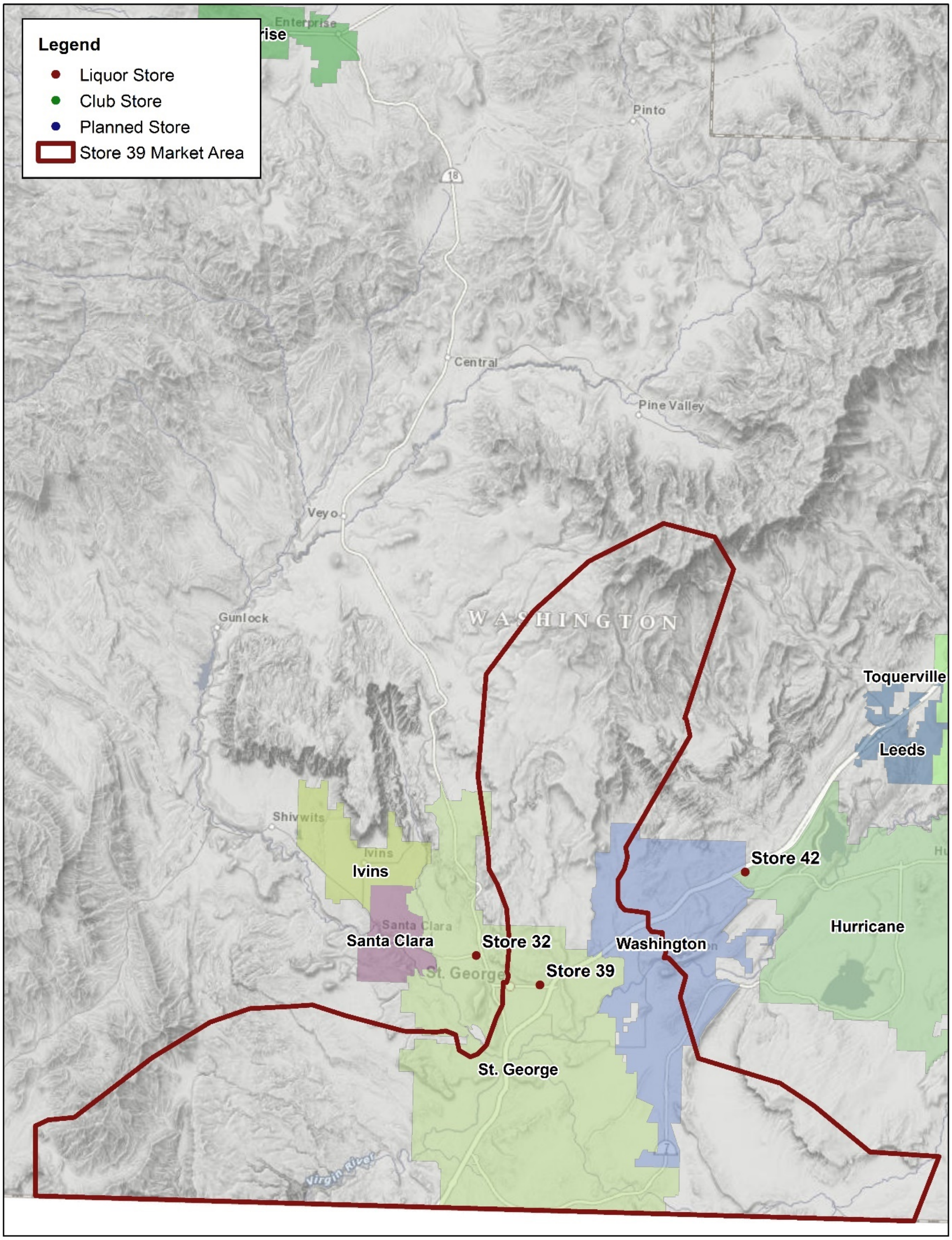


Future employment growth in the area shows that the State should prefer southern and western St. George locations over an alternate eastern option. The median age factor favors all three areas, but incomes are higher to the east and west.



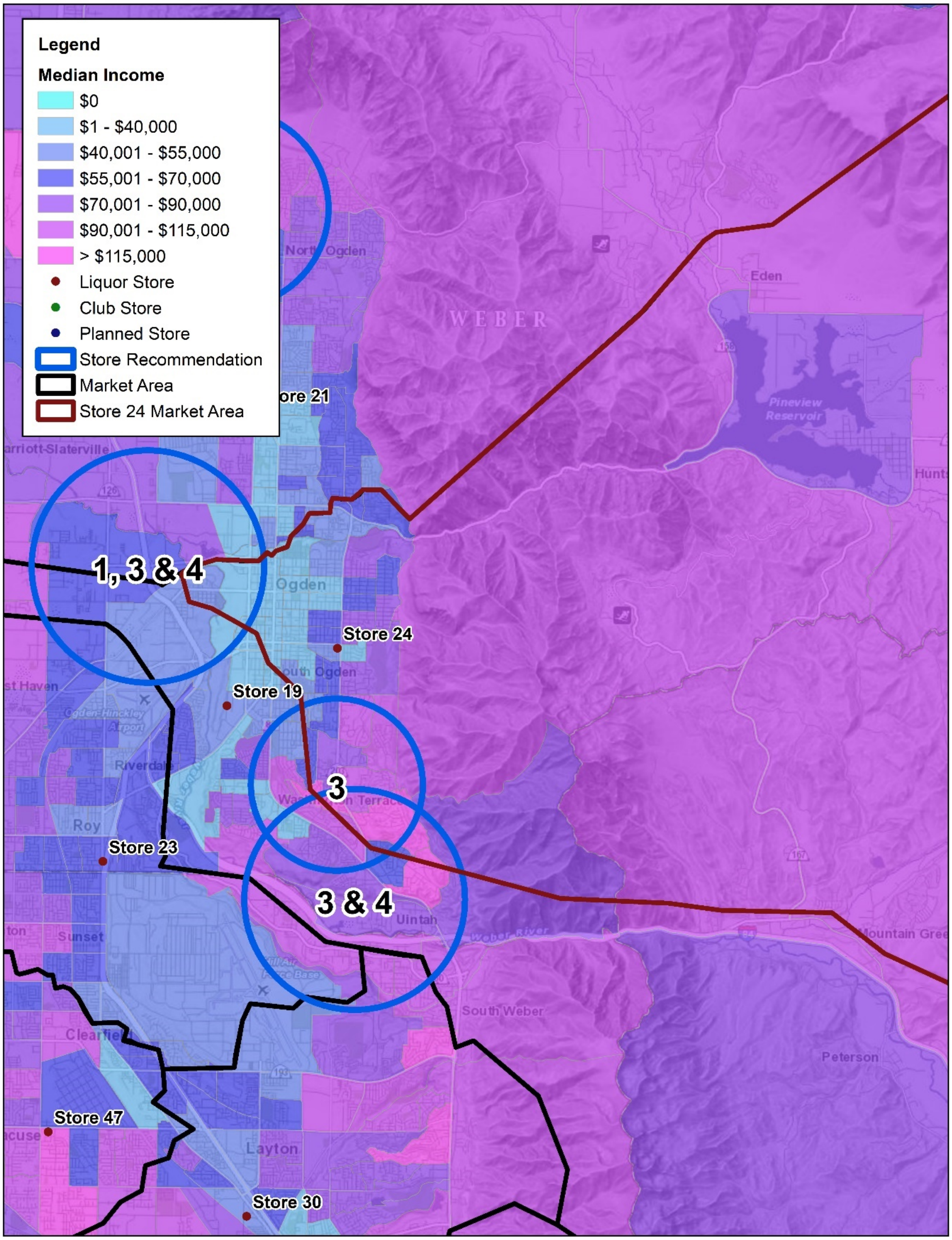
Municipalities in the area are only:

- Washington
- St. George

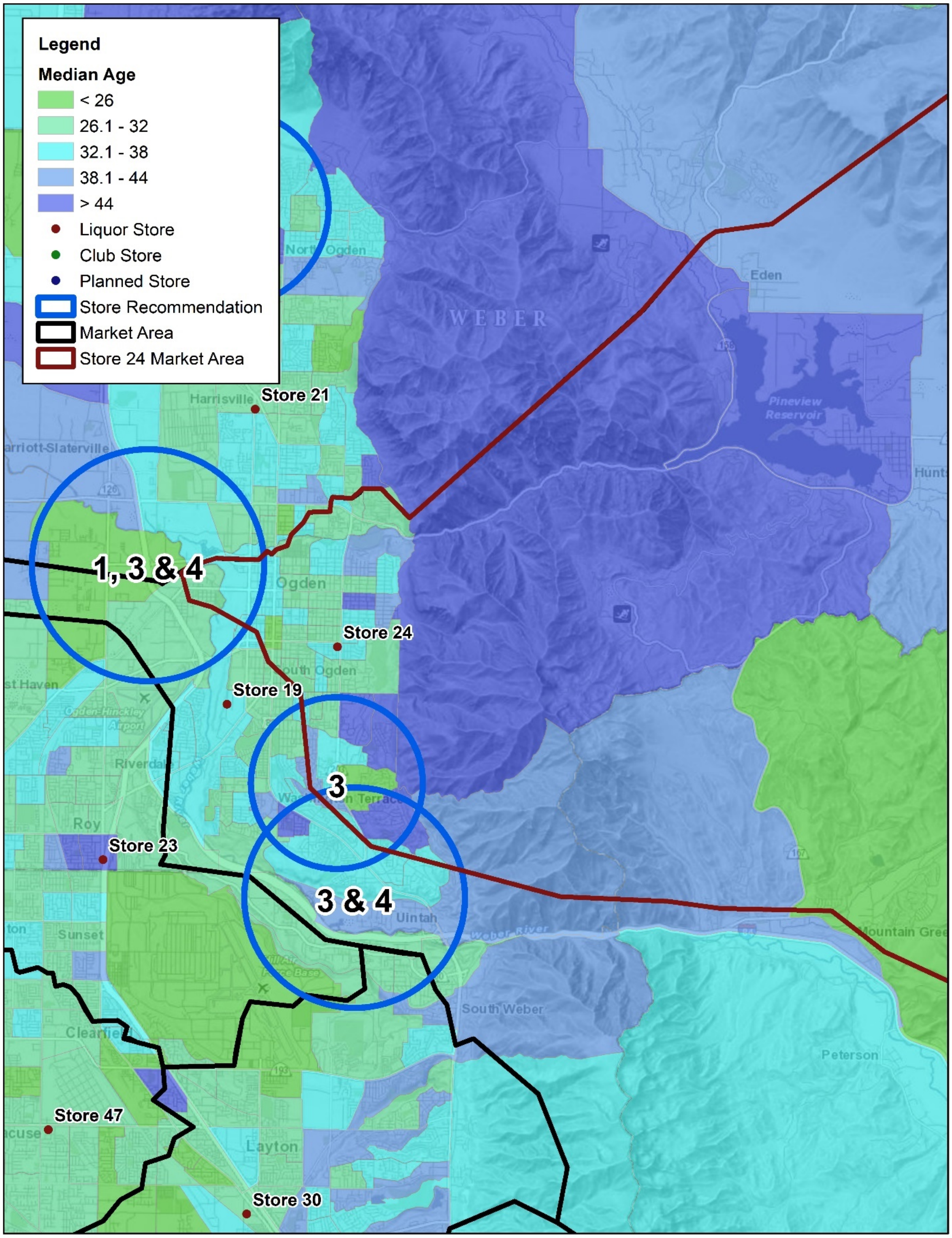


Priority 3: Store 24 – Ogden

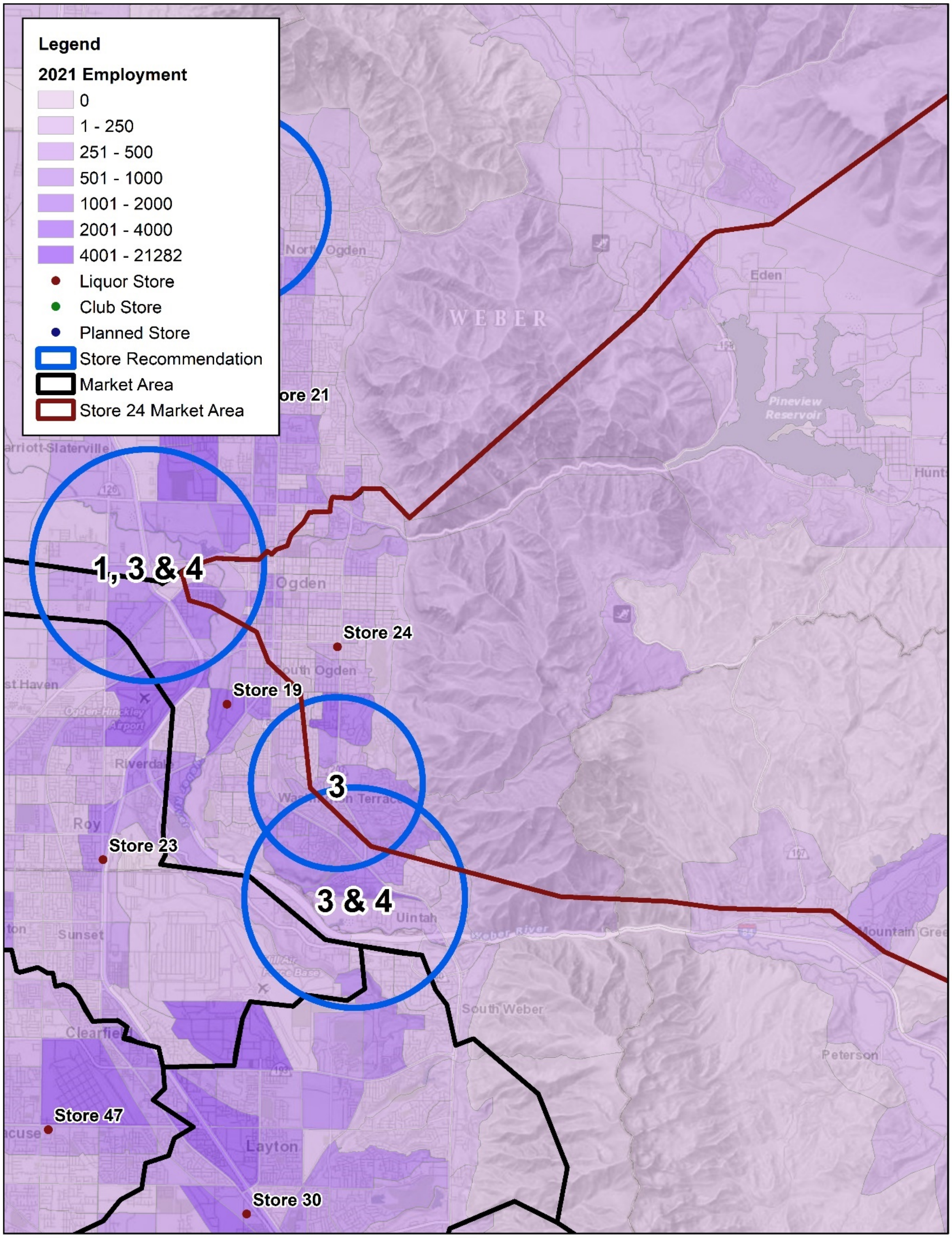
This store is unique from most of the others on this list because its market area ranks very average in terms of population growth. In fact, it lands high on the list because it ranks 3rd in bottles per hour. The map below shows a portion of the market area but highlights median income over population distribution.



The area to the south of Ogden also represents a good opportunity for a new store as median age is higher than that of the rest of the market area, except for areas surrounding the current store.

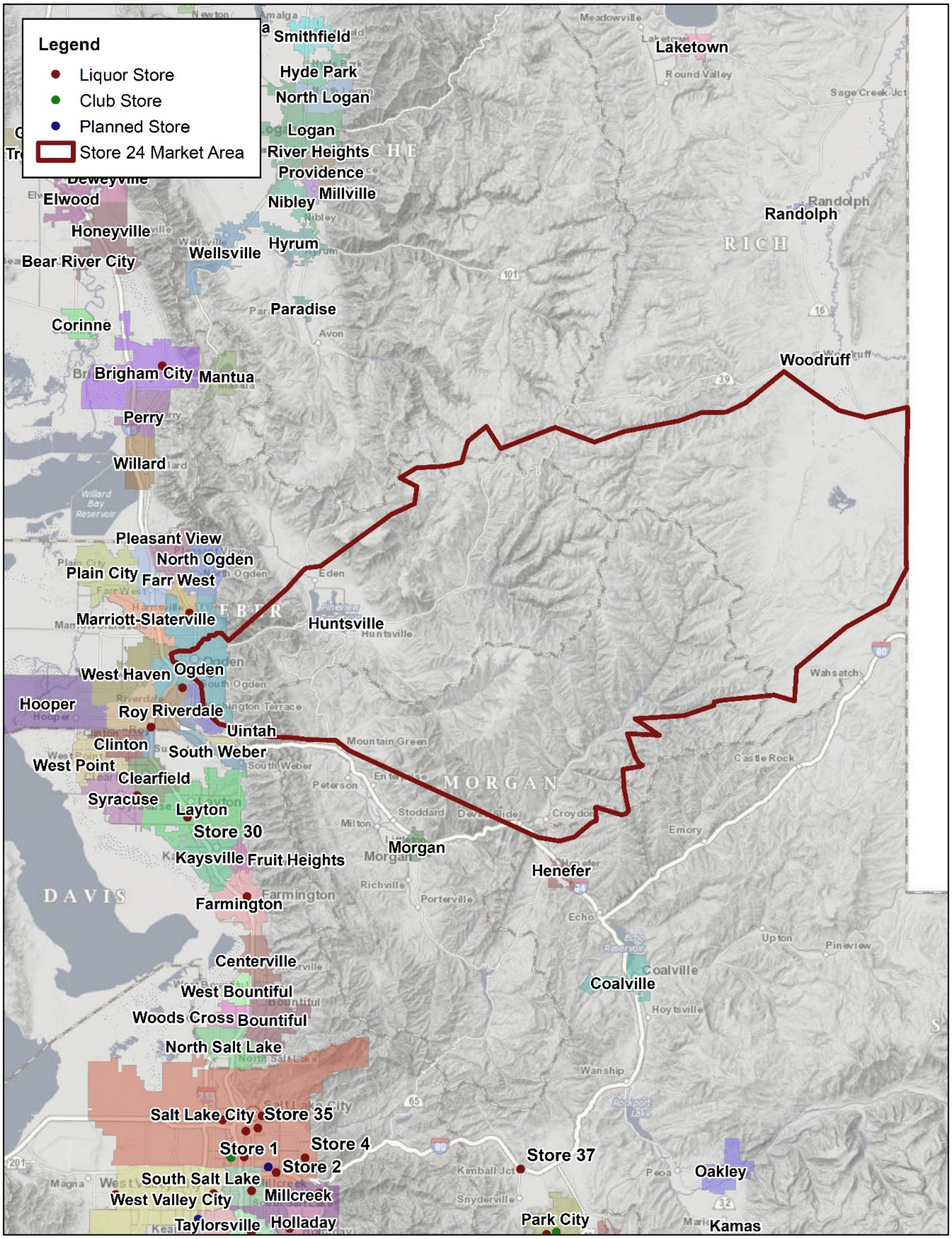


Areas to the east and west of store 24 show merit as they have stronger employment than the rest of the area. Future growth is expected to the south, with more expected in the west where priorities 1, 3, and 4 meet.



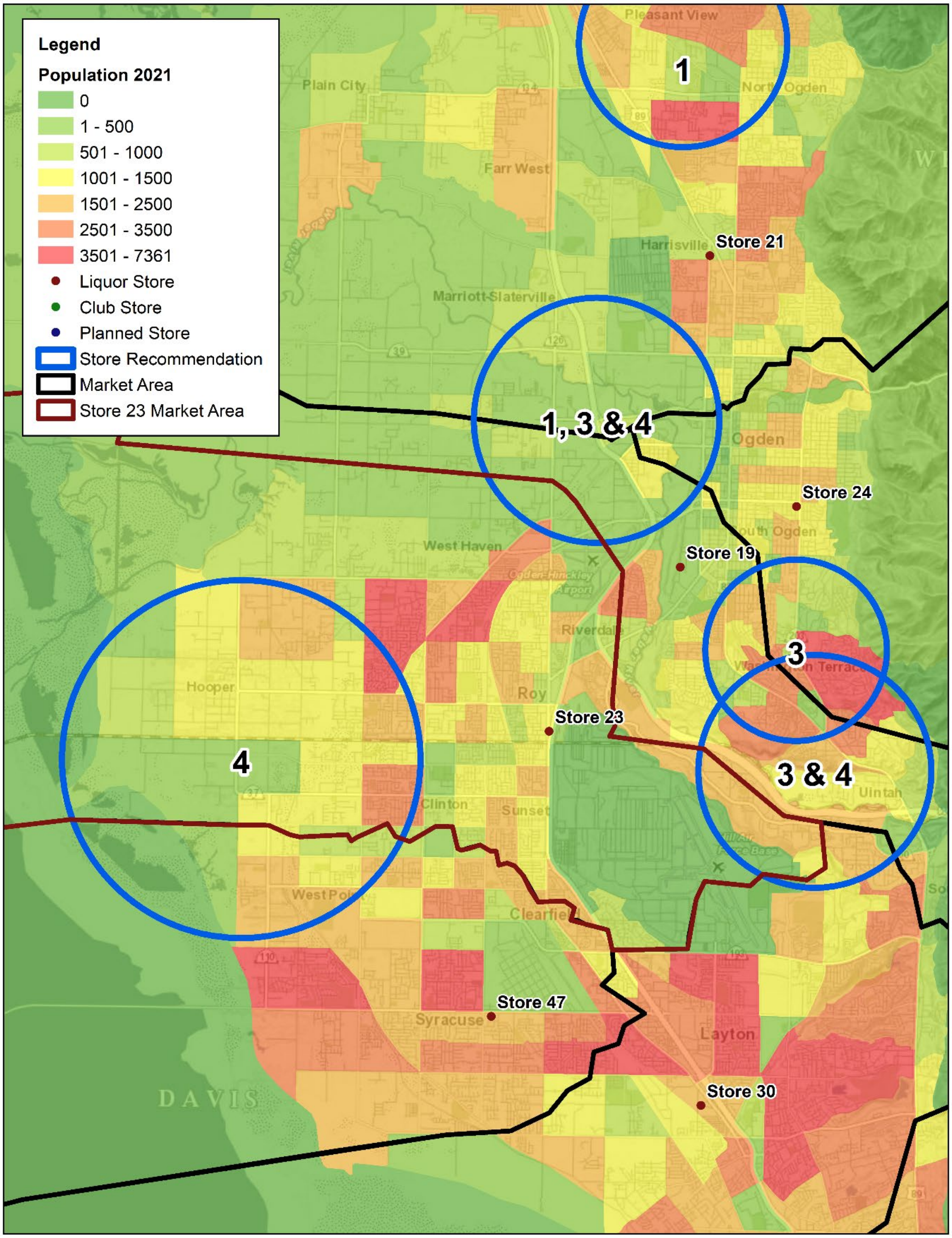
Due to the unique shape of the market area, this store covers a lot of land. However, there are only four municipalities in the area:

- Ogden
- South Ogden
- Uintah
- Huntsville

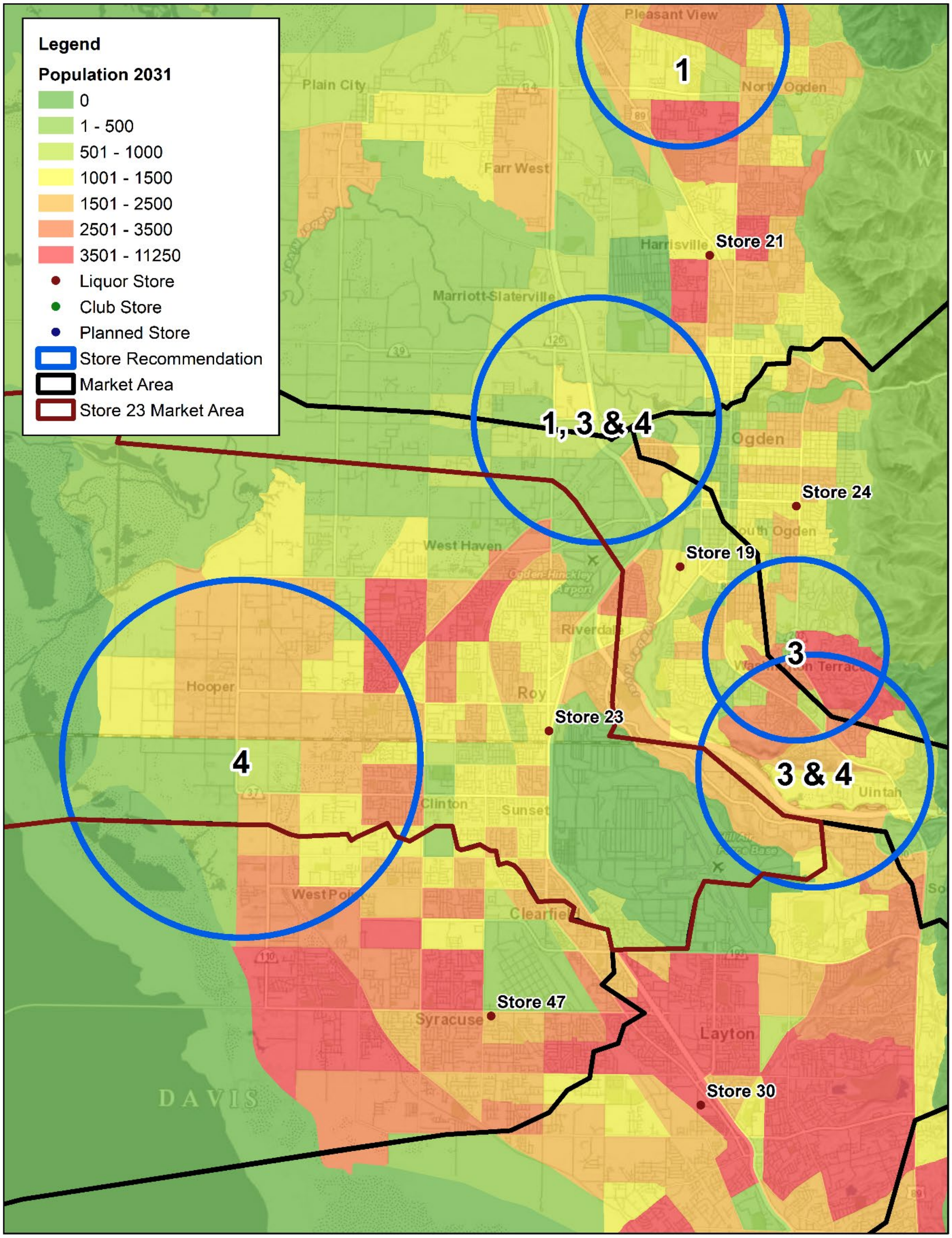


Priority 4: Store 23 – Roy

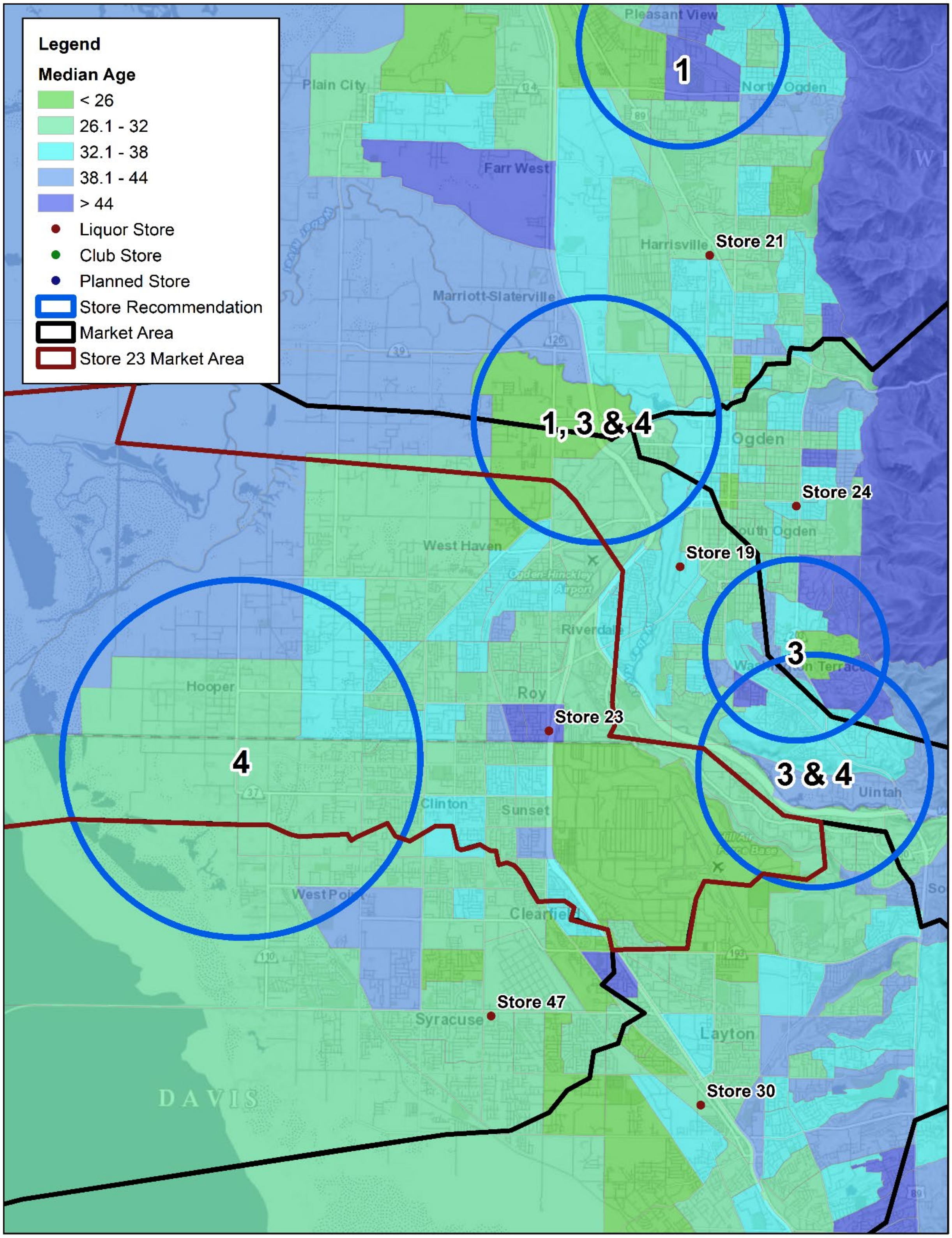
The market area in Roy ranked 12th and 13th in 2021 and 2031 population, respectively. Current clusters are towards both the east and west of the current store location.



Western Davis and Heber Counties will benefit from a new transit corridor through the area. There is potential for a new store to capitalize on the resultant increase in population. Additionally, the Roy store could be helped by combining new store locations with those of priority one and three.

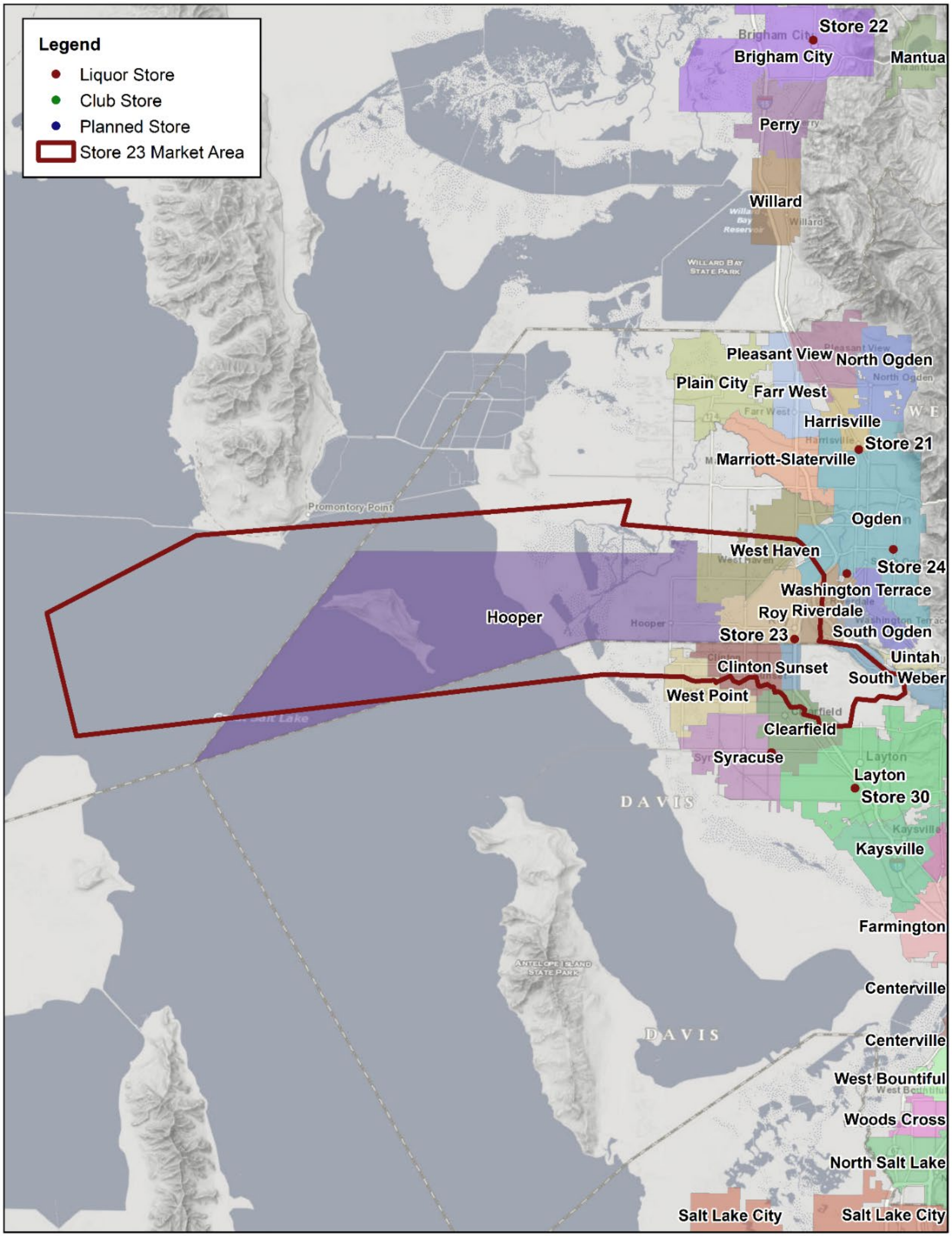


Store 23 is currently in an excellent location for median age. Future stores will have a limited selection of prime locations for the same factor. However, this metric should be subject to change with an influx of new citizens.



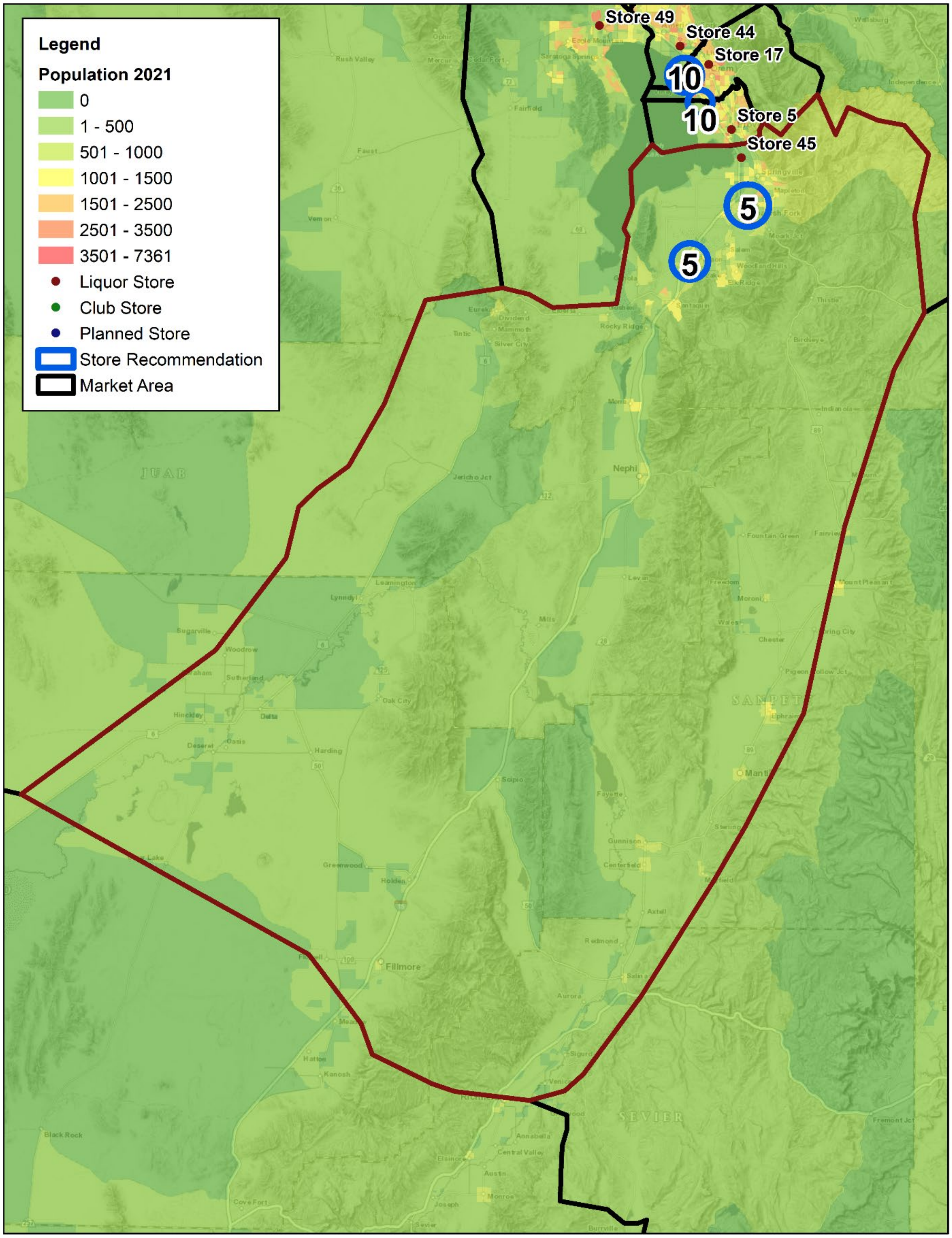
This area is another oddly shaped one. Municipalities located (at least partially) in this market area include:

- Hooper
- West Haven
- Ogden
- Riverdale
- Clinton
- Sunset
- Roy
- Clearfield

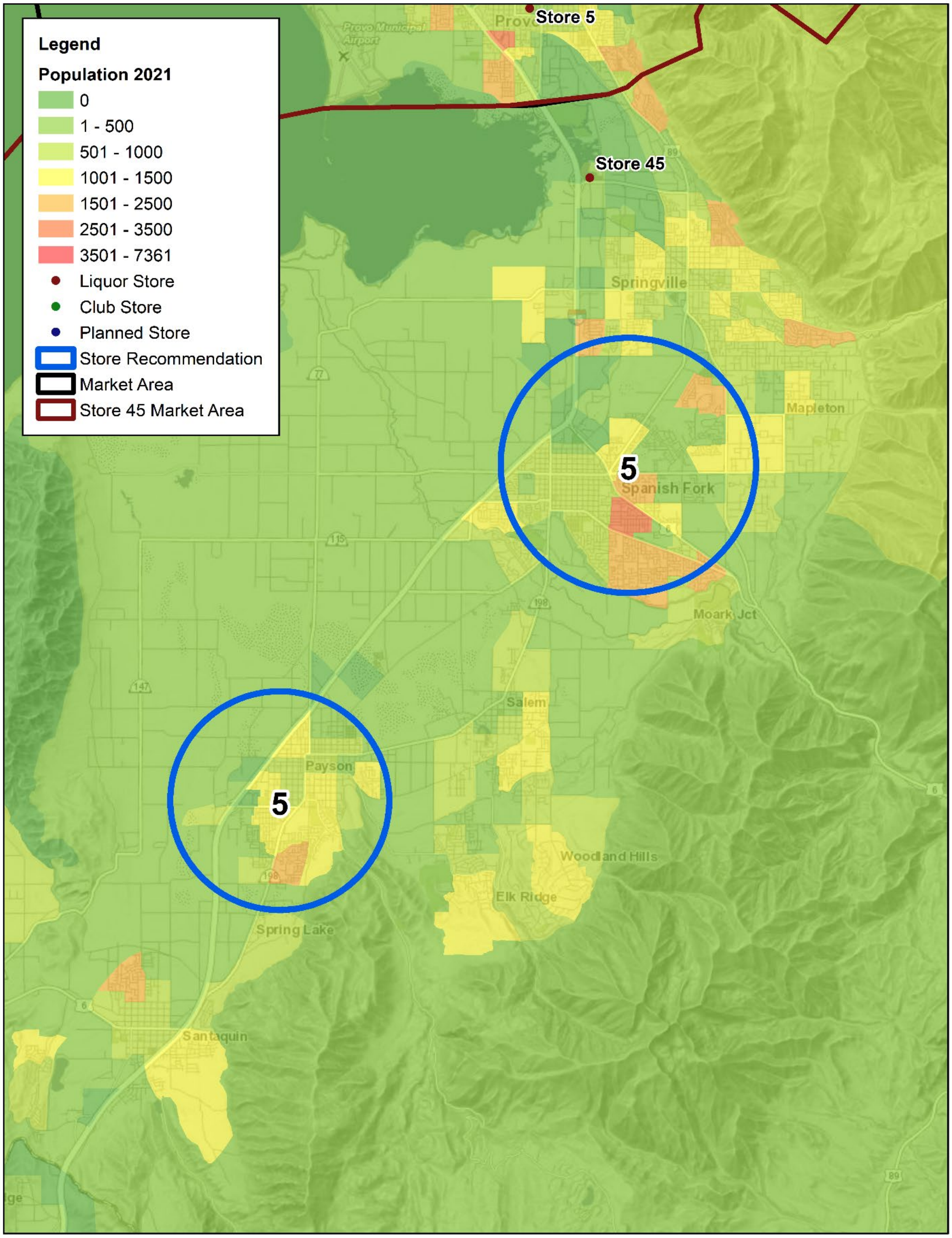


Priority 5: Store 45 – Springville

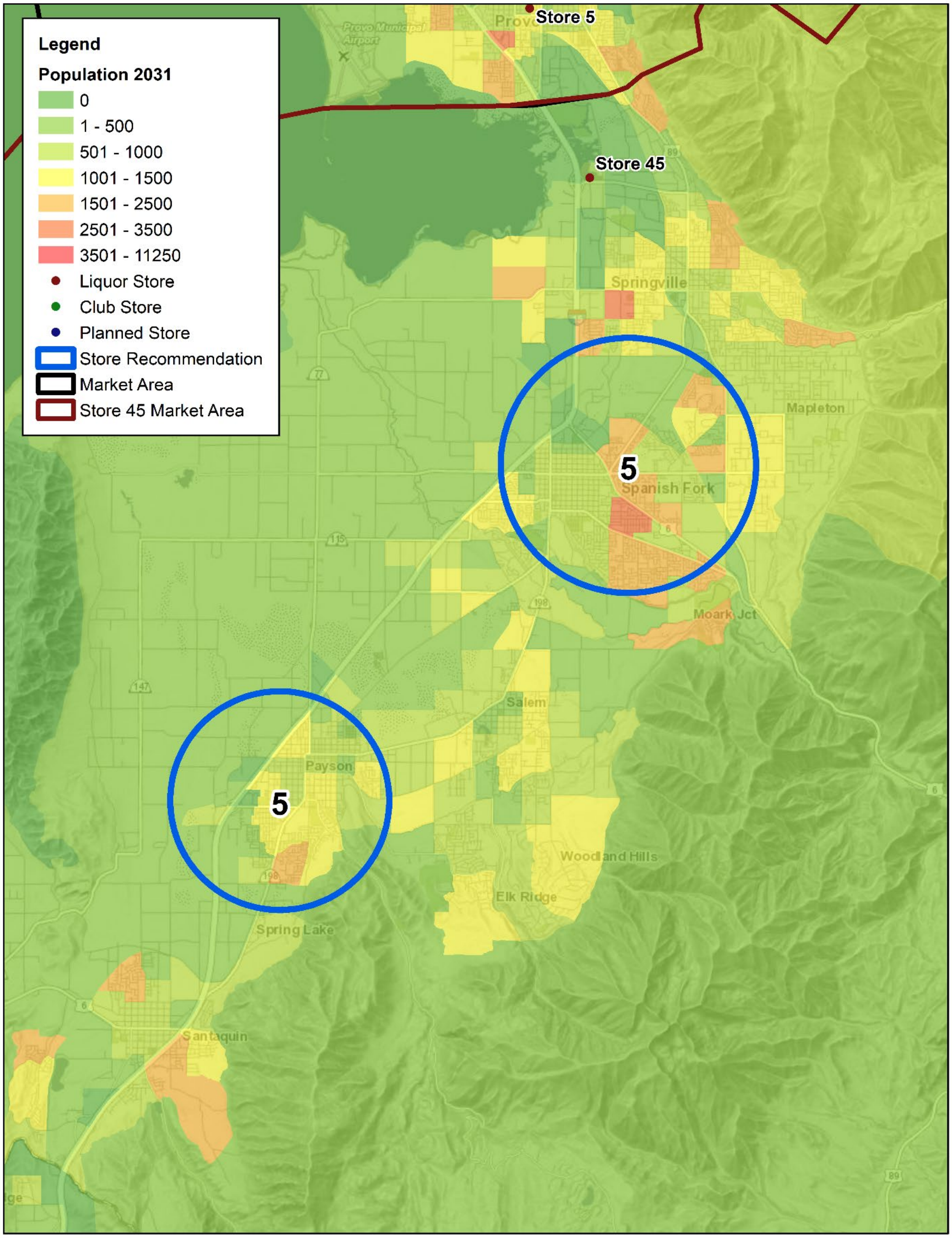
Springville ranks 1st in both population this year and in the year 2031. This is due to the large geographic area that it covers in the second most populated county in the state.



The above map shows that a lot of the market area is rural. Closer to Store 45, most of the population is clustered into communities such as Santaquin, Payson, and Spanish Fork. To better serve clients living in these areas, a store in a developing community would be best.

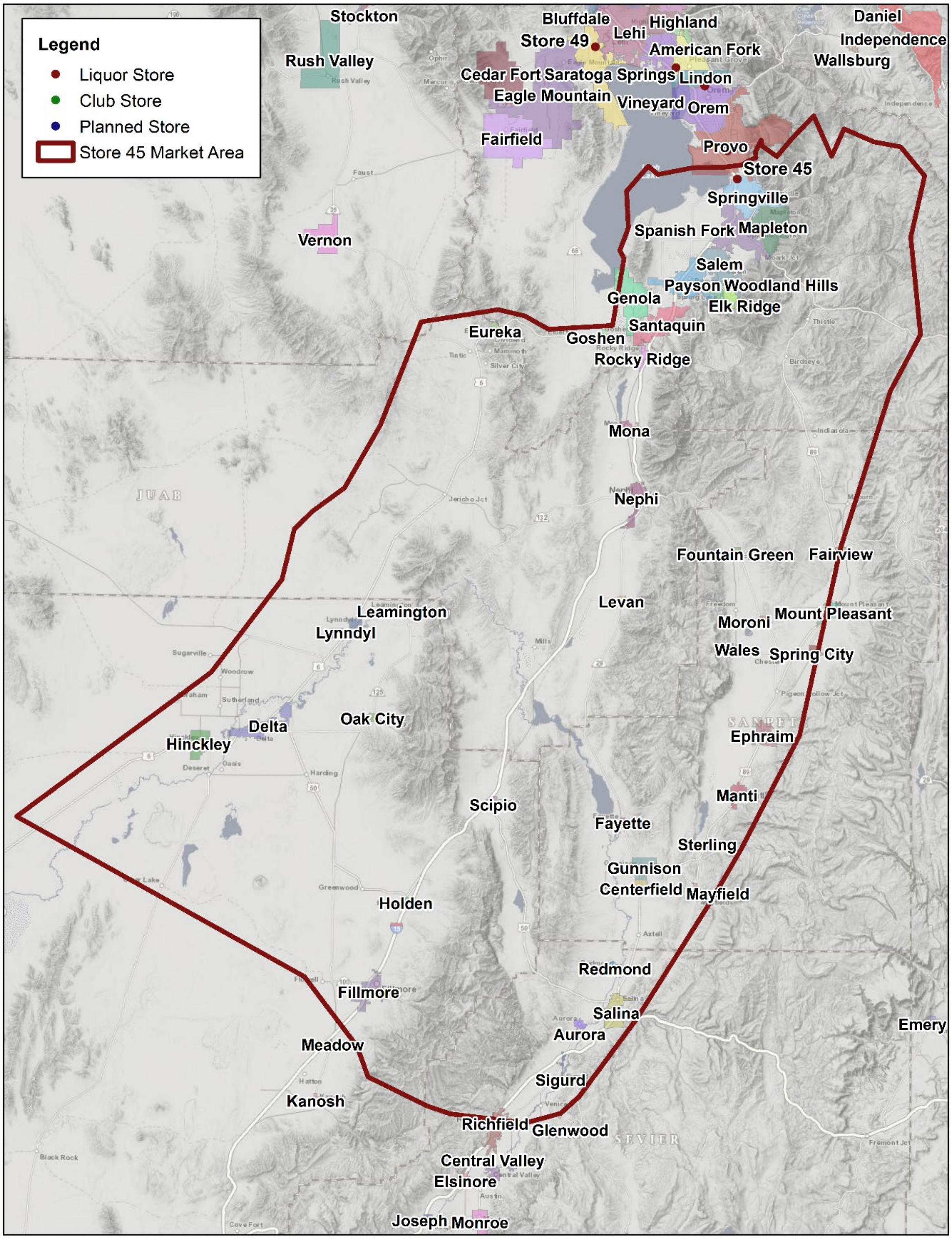


This recommendation is strengthened by the growth expected in Spanish Fork and Payson by the year 2031. A large population meant, at least for this store, that transactions per capita were low. An additional market would help people who are willing to consume alcohol but discouraged by commute times.



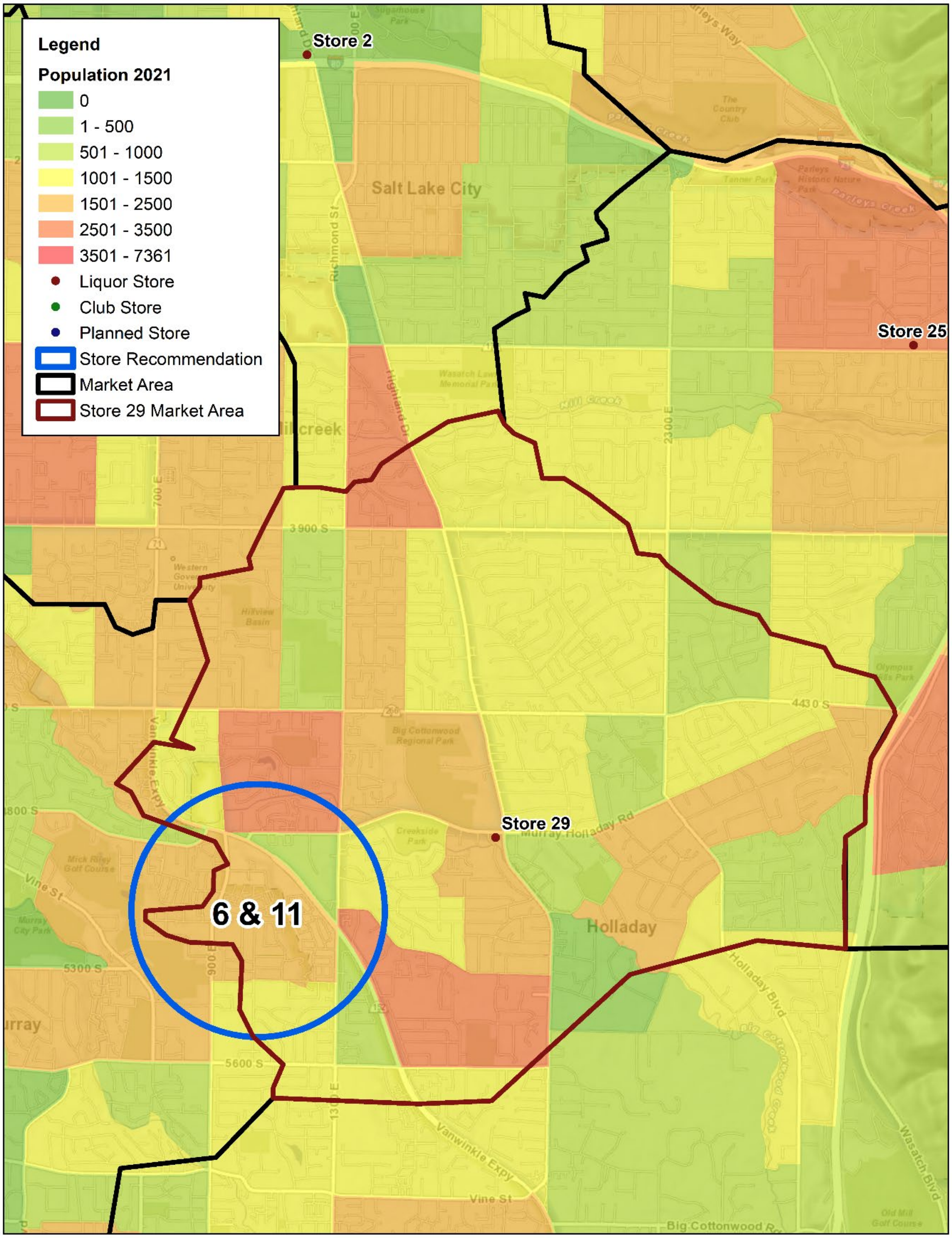
Municipalities located in these market areas include:

- Payson
- Nephi
- Spanish Fork
- Fillmore
- Manti
- Springville

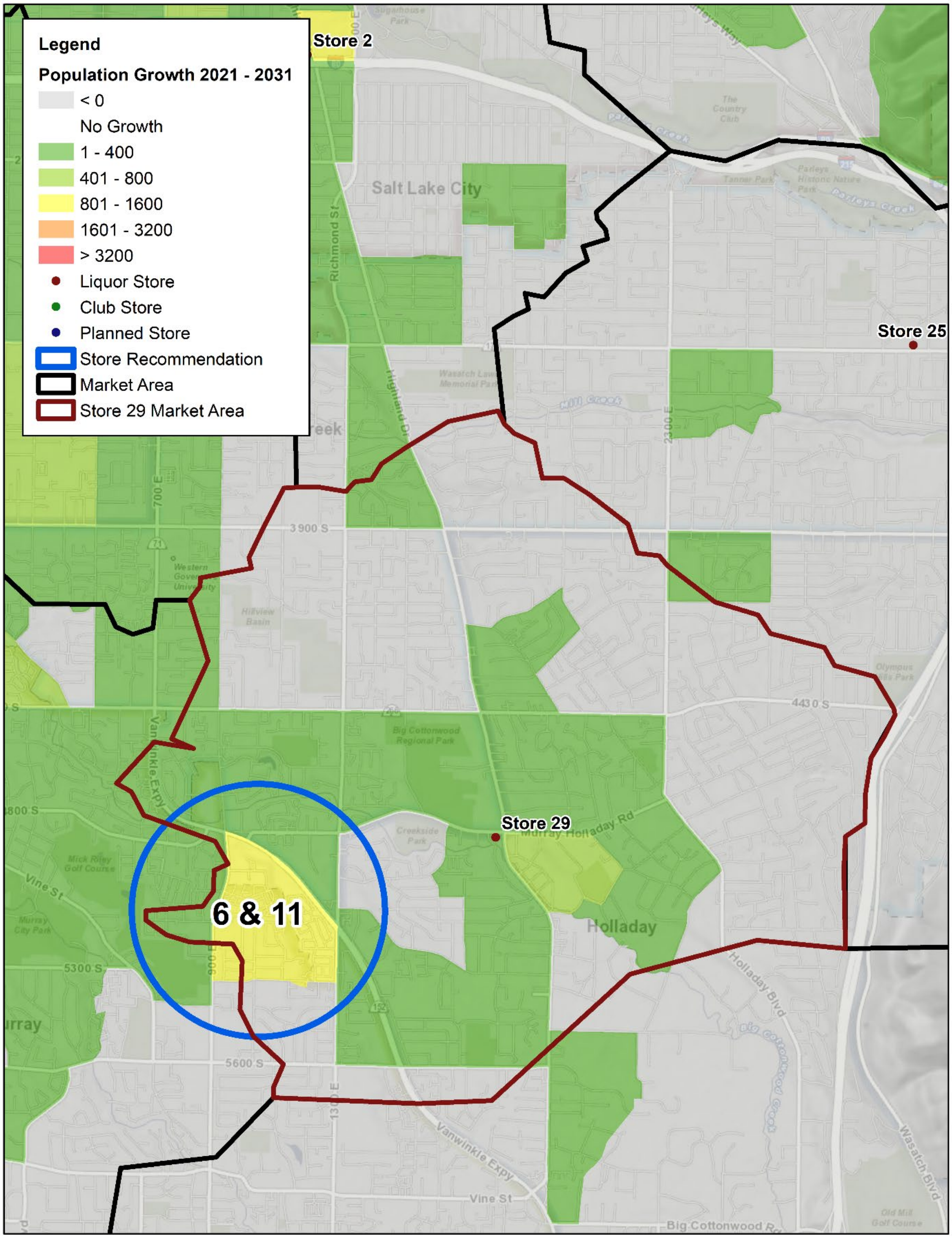


Priority 6: Store 29 – Holladay

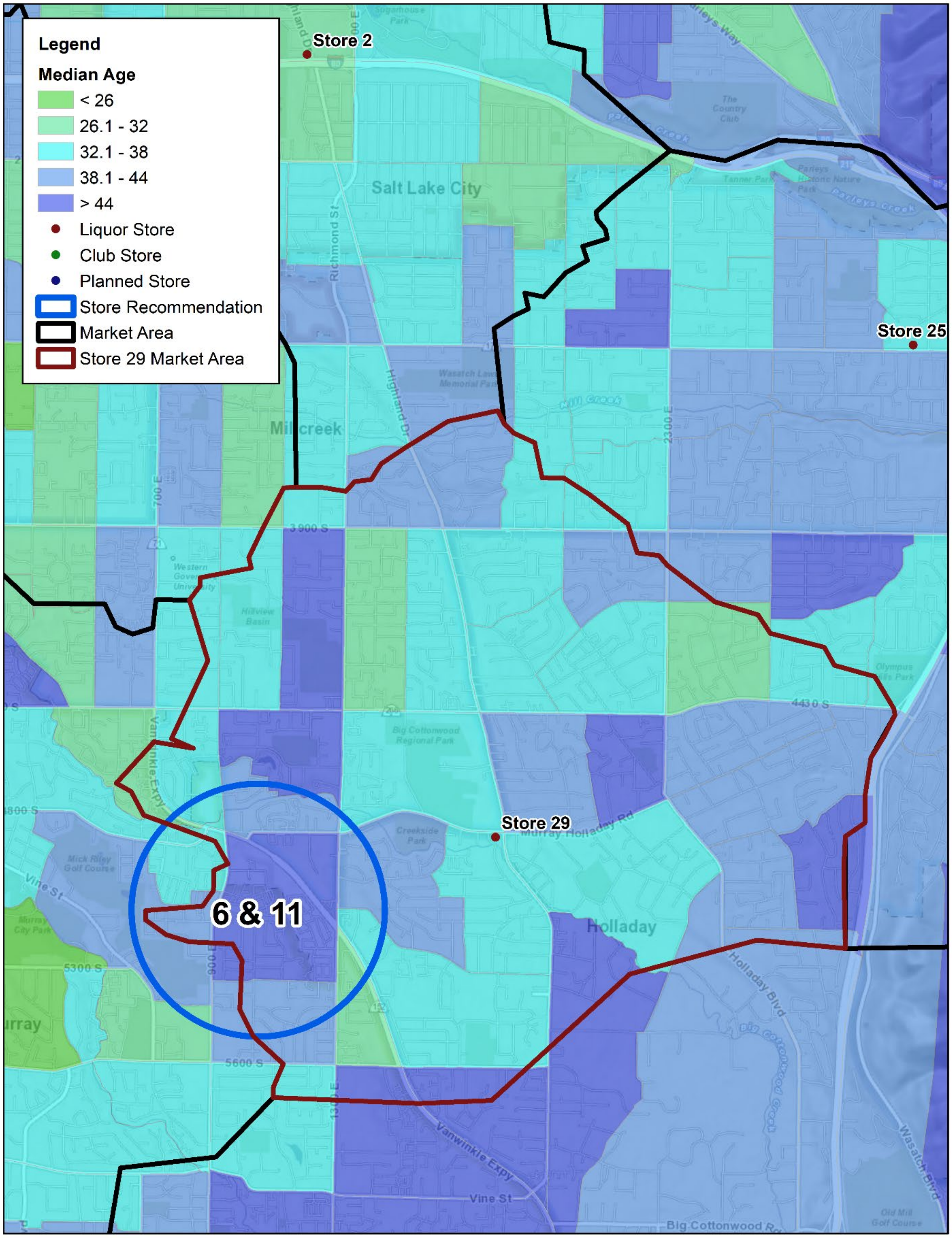
The Holladay store is a unique store because it ranks high in population density rather than absolute population in years 2021 or 2031. Additionally, it is not expected to grow very much in the next decade. The map below assumes that the State would capitalize on a higher density area for the 6th recommended store.



In terms of absolute population growth, the highlighted area is the only one that makes sense for Holladay. It is the area where the most growth will occur – and other growth in the region is already near the current store.

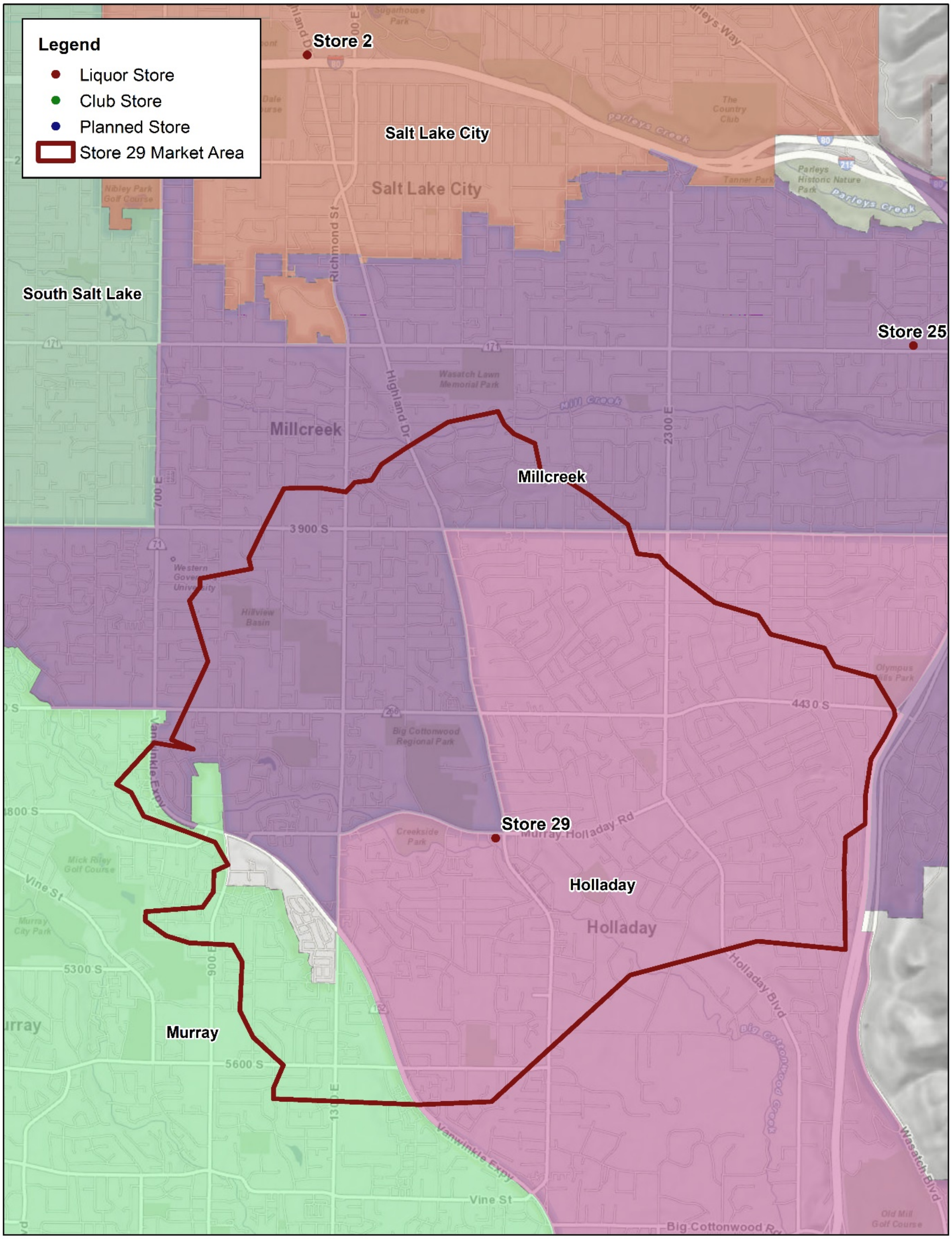


Median ages are also higher in the recommended area than in other areas. It is worth noting that the eastern portion of the market area has a high median age as well, which signifies another good location for a potential store.



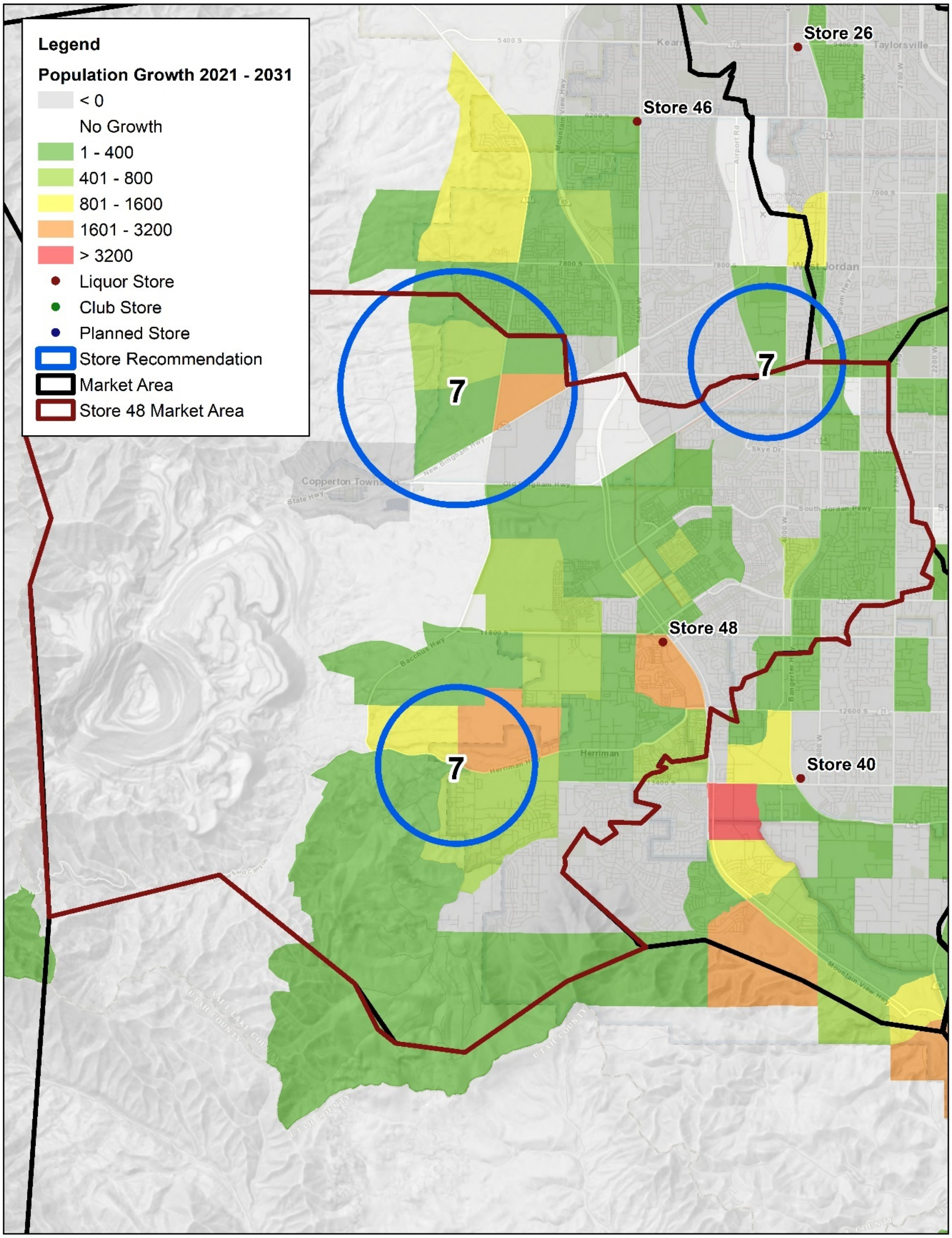
Municipalities located in this market area include:

- Millcreek
- Holladay
- Murray

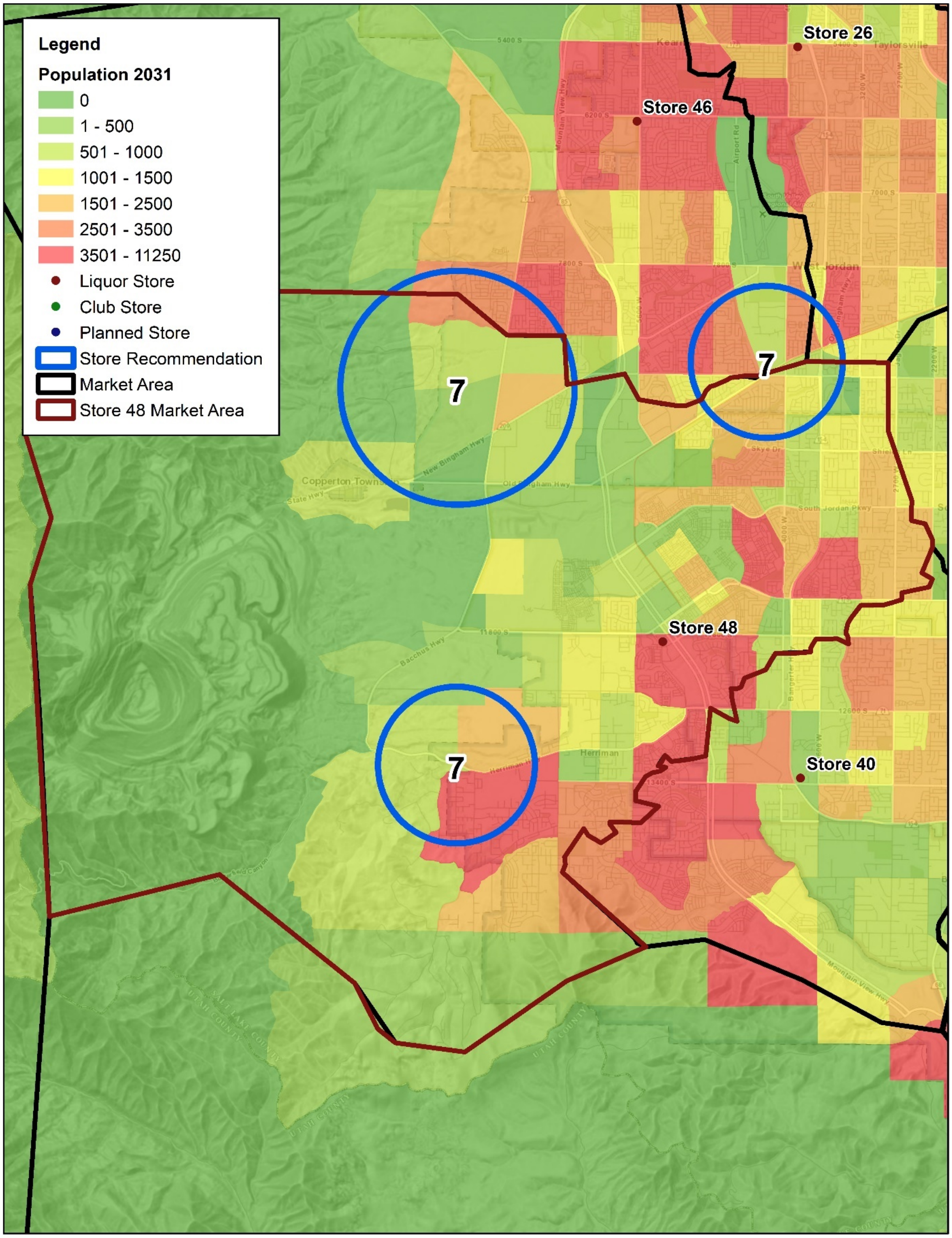


Priority 7: Store 48 – Herriman

Store 48 has the 13th largest population this year, the 12th largest population in 2031, and the 7th largest population increase in the next decade. New stores are best located where future population growth is concentrated, which, in this case, is concentrated on the west end of the City.

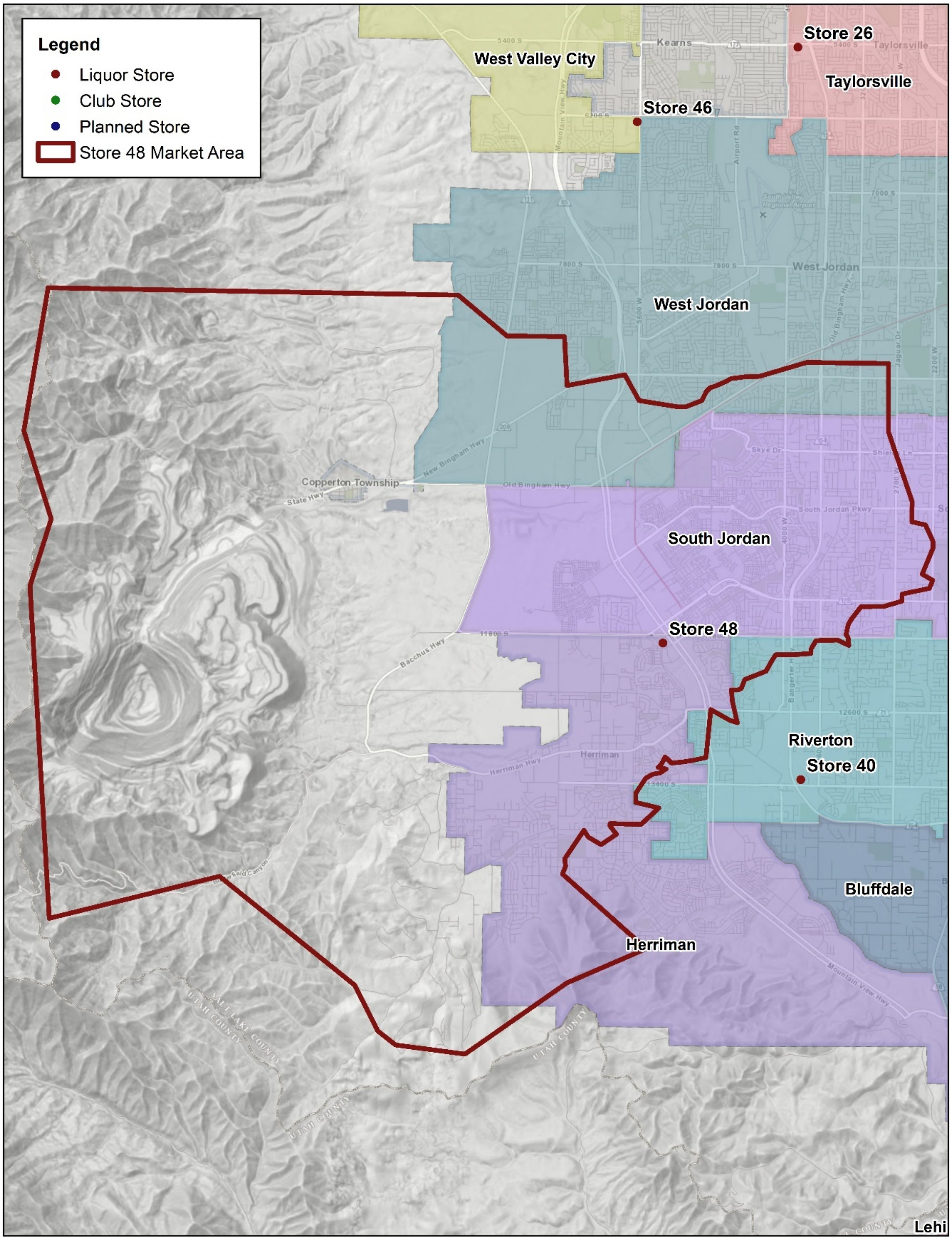


In the future, it is estimated that population will be highly concentrated in the areas highlighted by the map below.



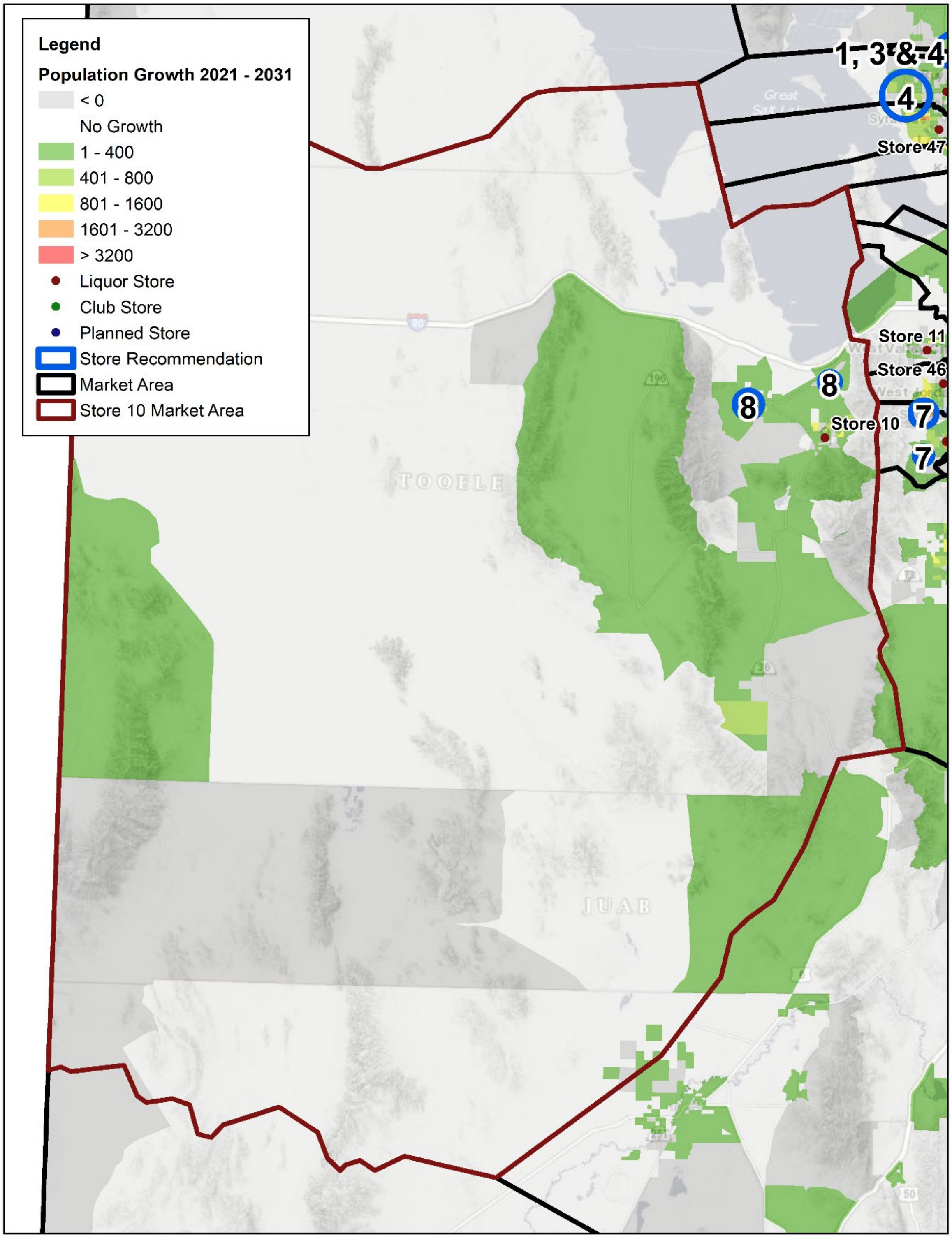
Municipalities located in this market area include:

- Herriman
- South Jordan
- Riverton
- West Jordan

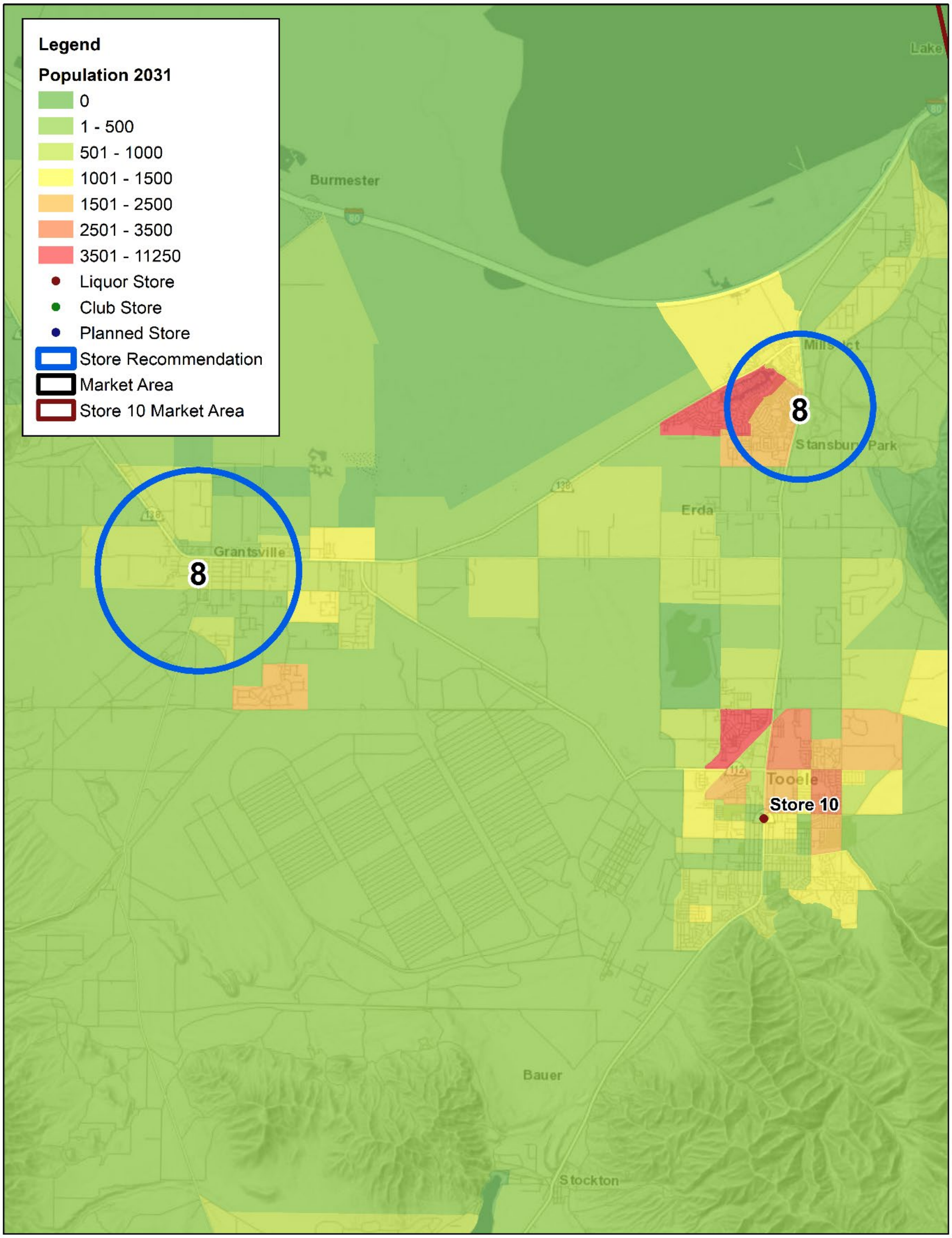


Priority 8: Store 10 – Tooele

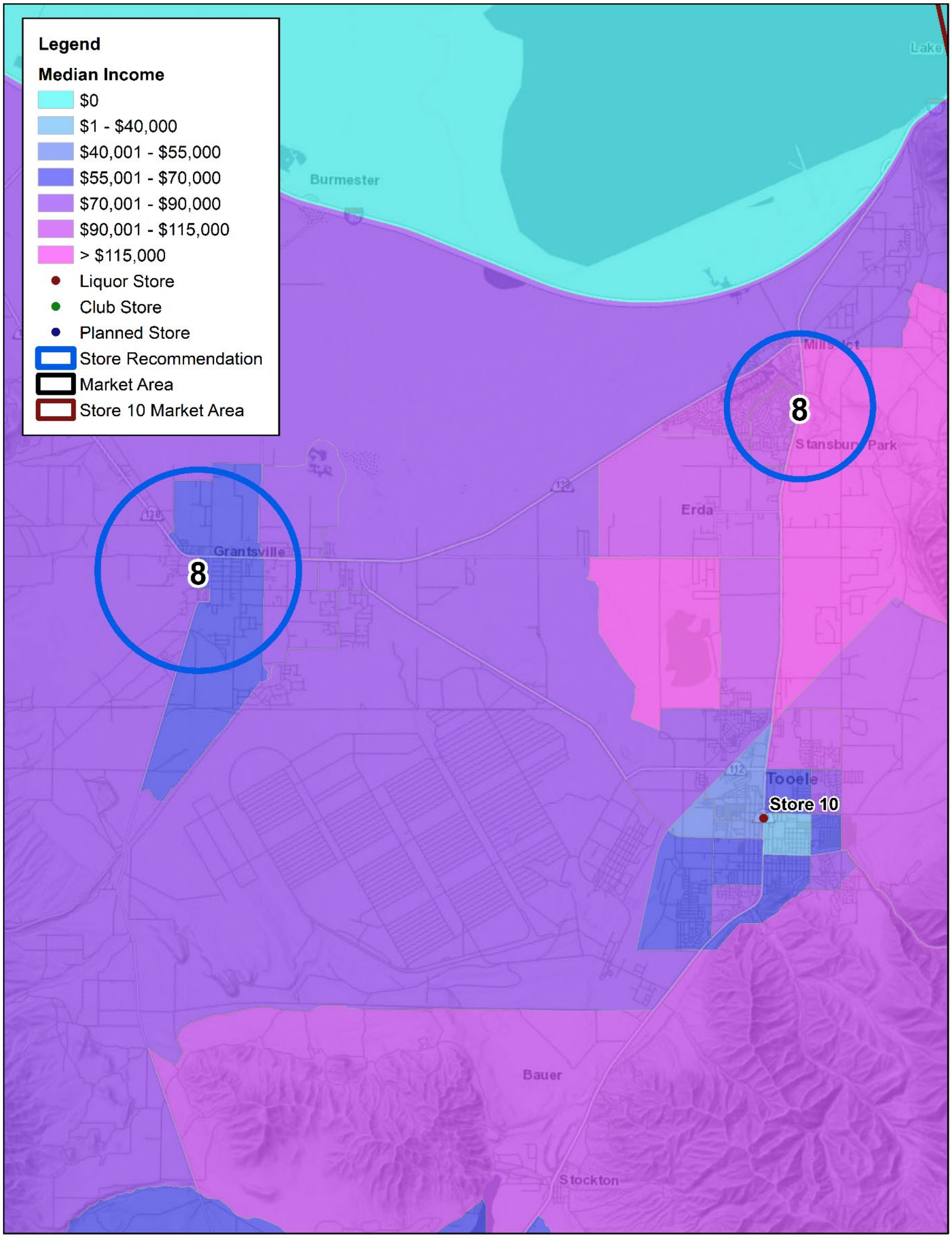
Tooele is in a situation like Springville – the store encompasses such a large area that it will naturally have advantages over other stores in total population and population growth. Where Tooele differs from Springville is in higher bottles per hour and transactions per capita.



In 2031, there will be even higher concentrations of people along Highway 138. Stansbury Park and Grantsville will grow a lot more, and they could be excellent locations to keep some of the stress off the Tooele store.

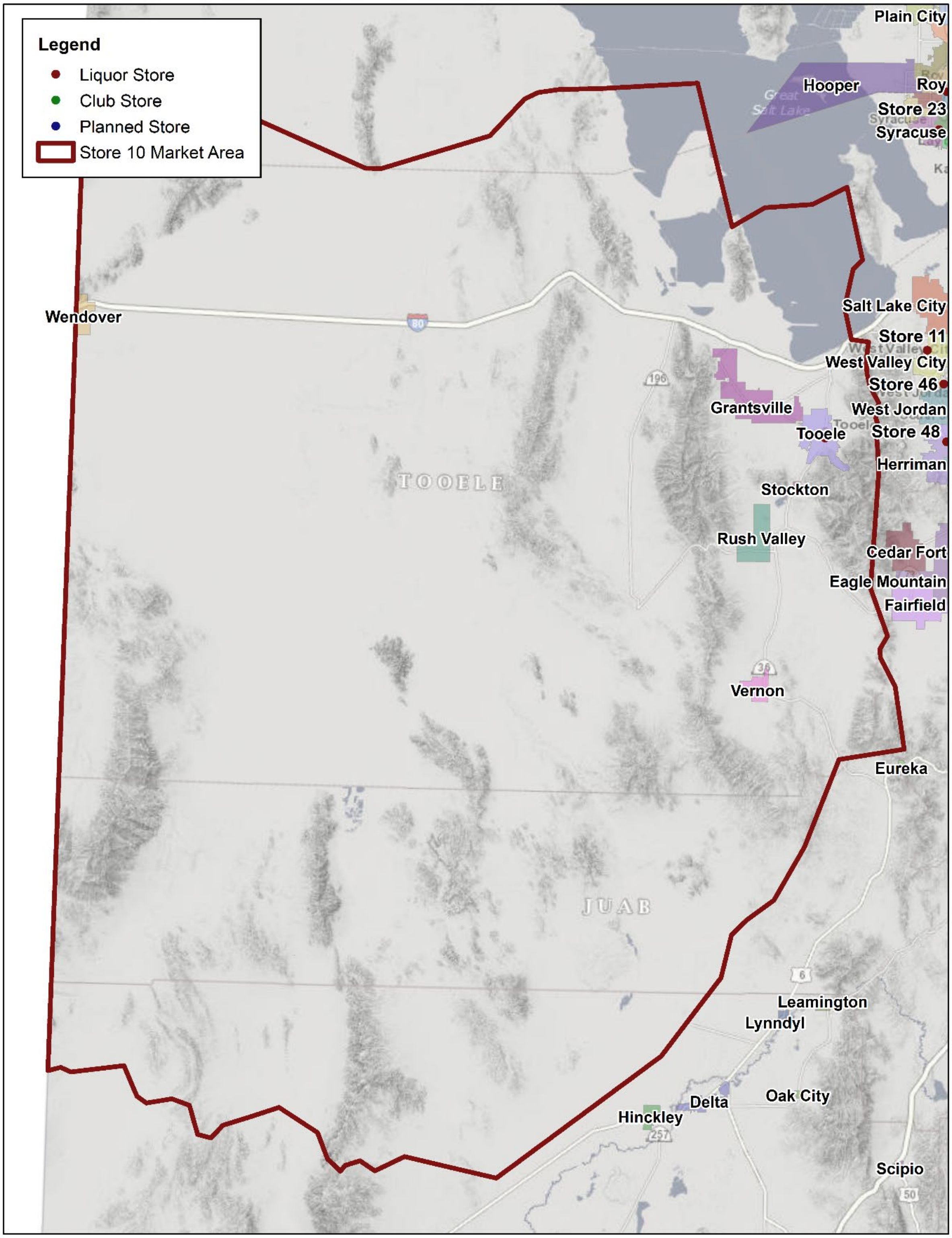


If the State must decide between Stansbury Park and Grantsville, it is worth knowing that both areas have a higher median age that would be beneficial to an alcohol store. Stansbury Park, however, has a higher median income than Grantsville and could better support a store for this reason.



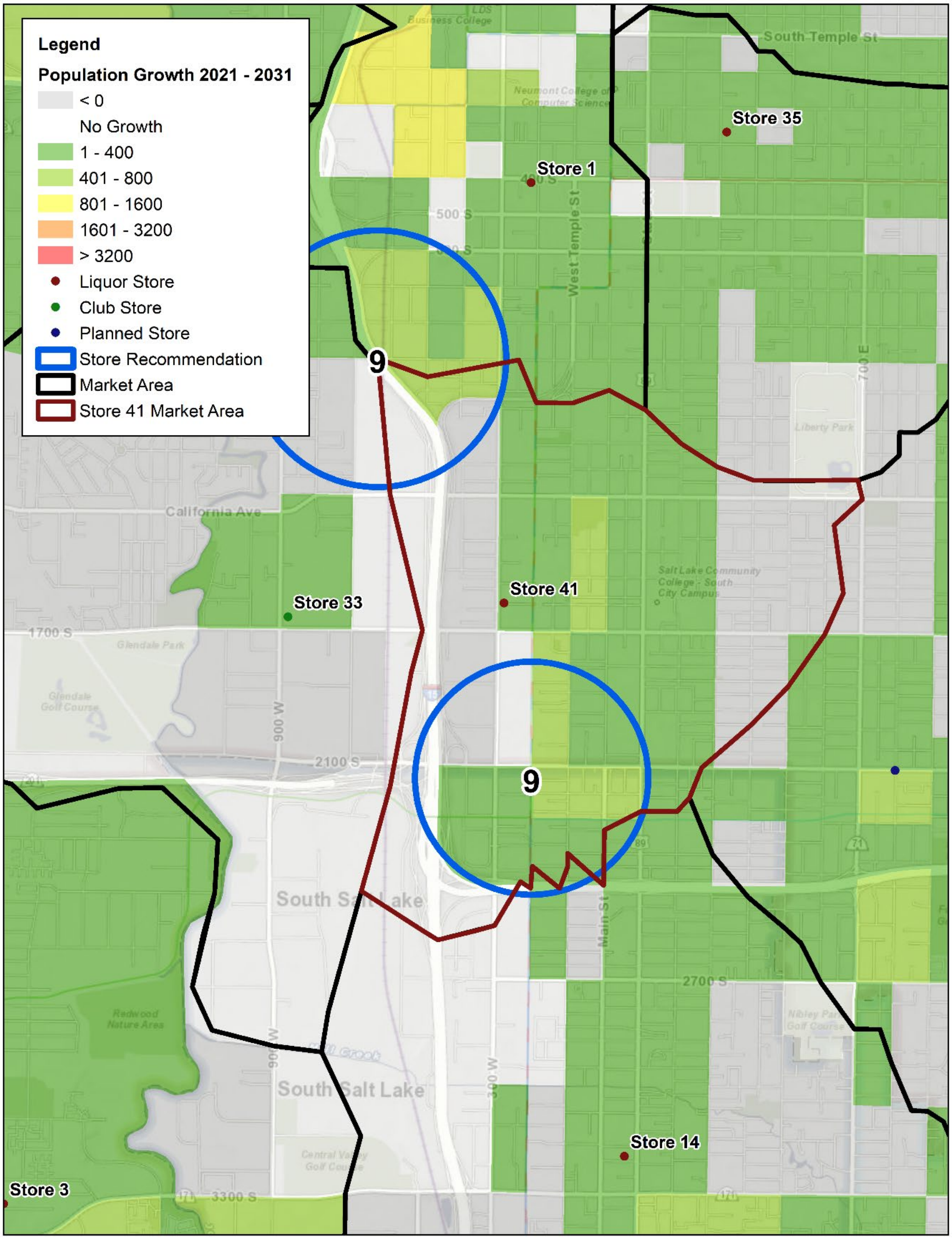
Municipalities located in this market area include:

- Grantsville
- Tooele
- Rush Valley
- Vernon
- Wendover

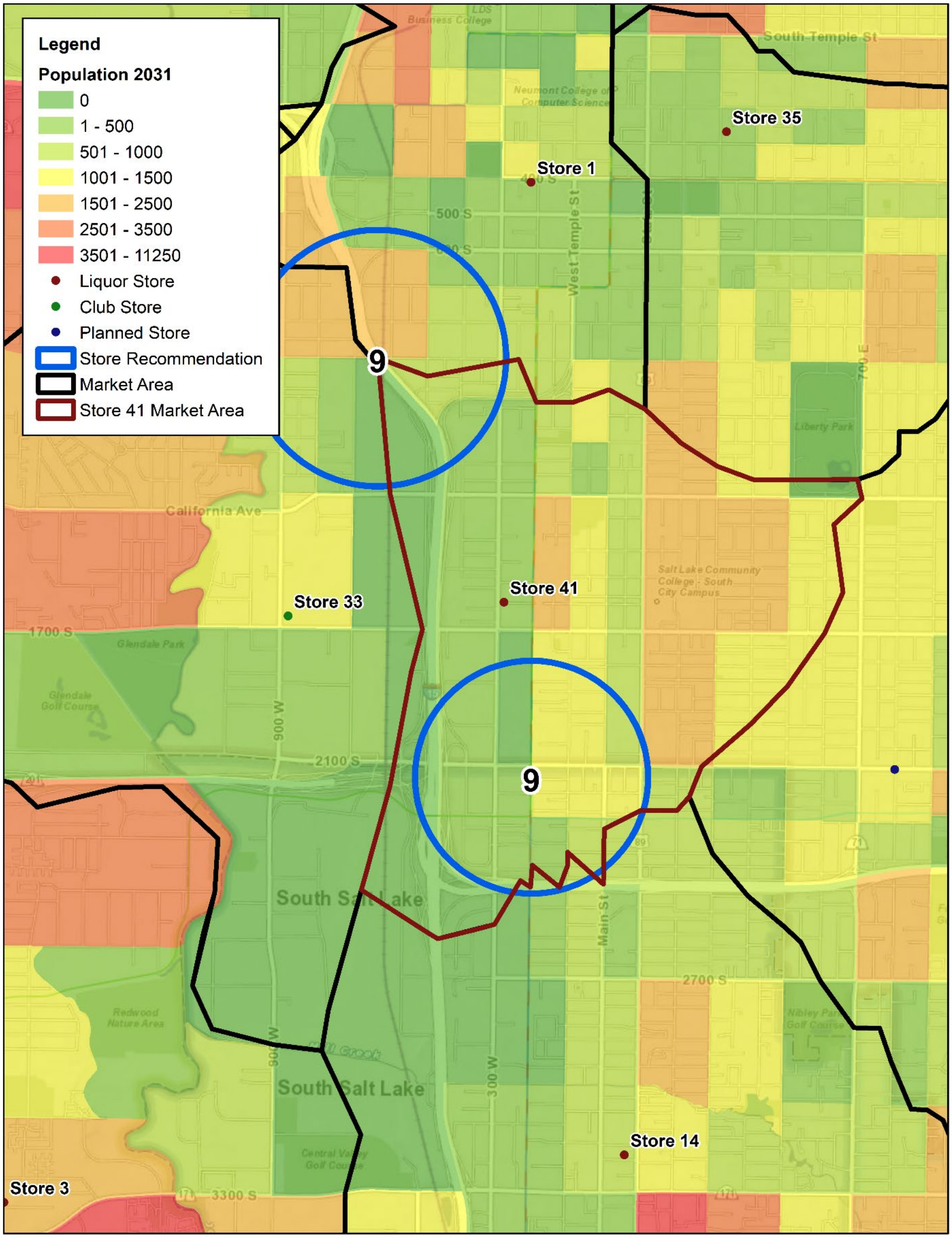


Priority 9: Store 41 – Harris Avenue SLC

Harris Avenue does not rank very high in terms of current population or population growth. However, the market area is already small, and it benefits from a high population density within the area. Due to a lower population, the store scores very well in transactions per capita. Finally, it ranks 9th in terms of bottles per hour.

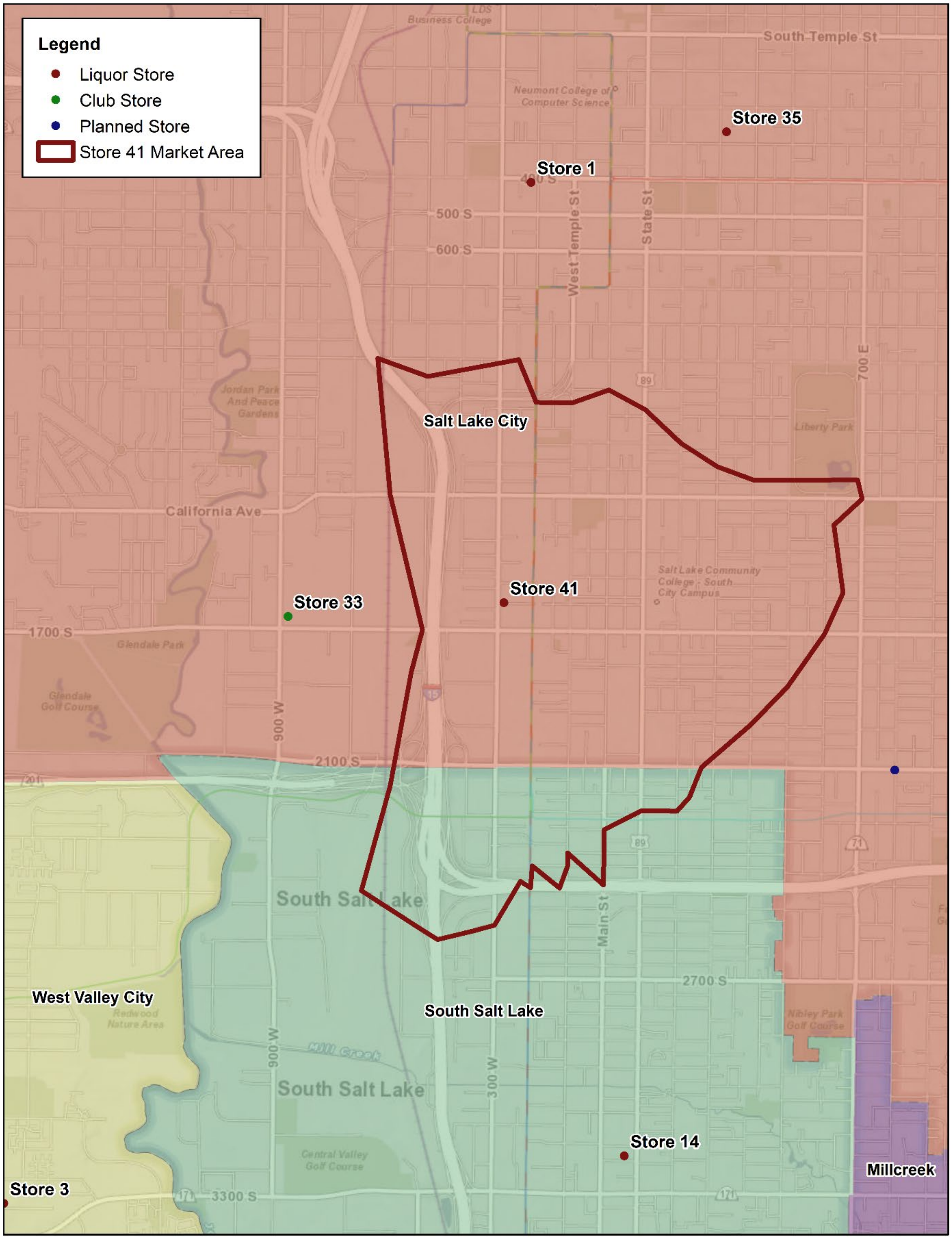


The map above and the map below both show that a planned Sugarhouse store is in a good spot for growth.



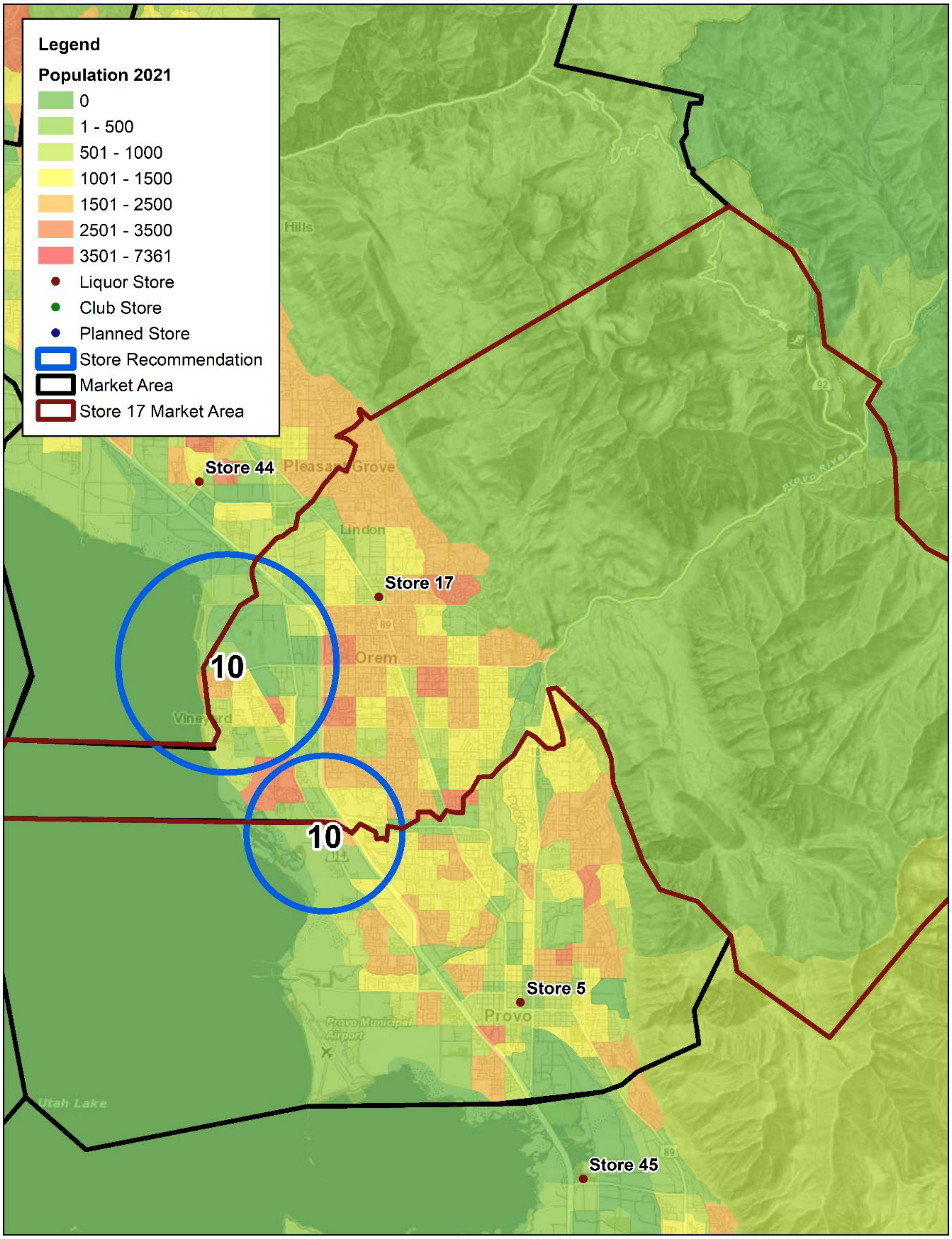
Municipalities located in this market area only include:

- Salt Lake City
- South Salt Lake

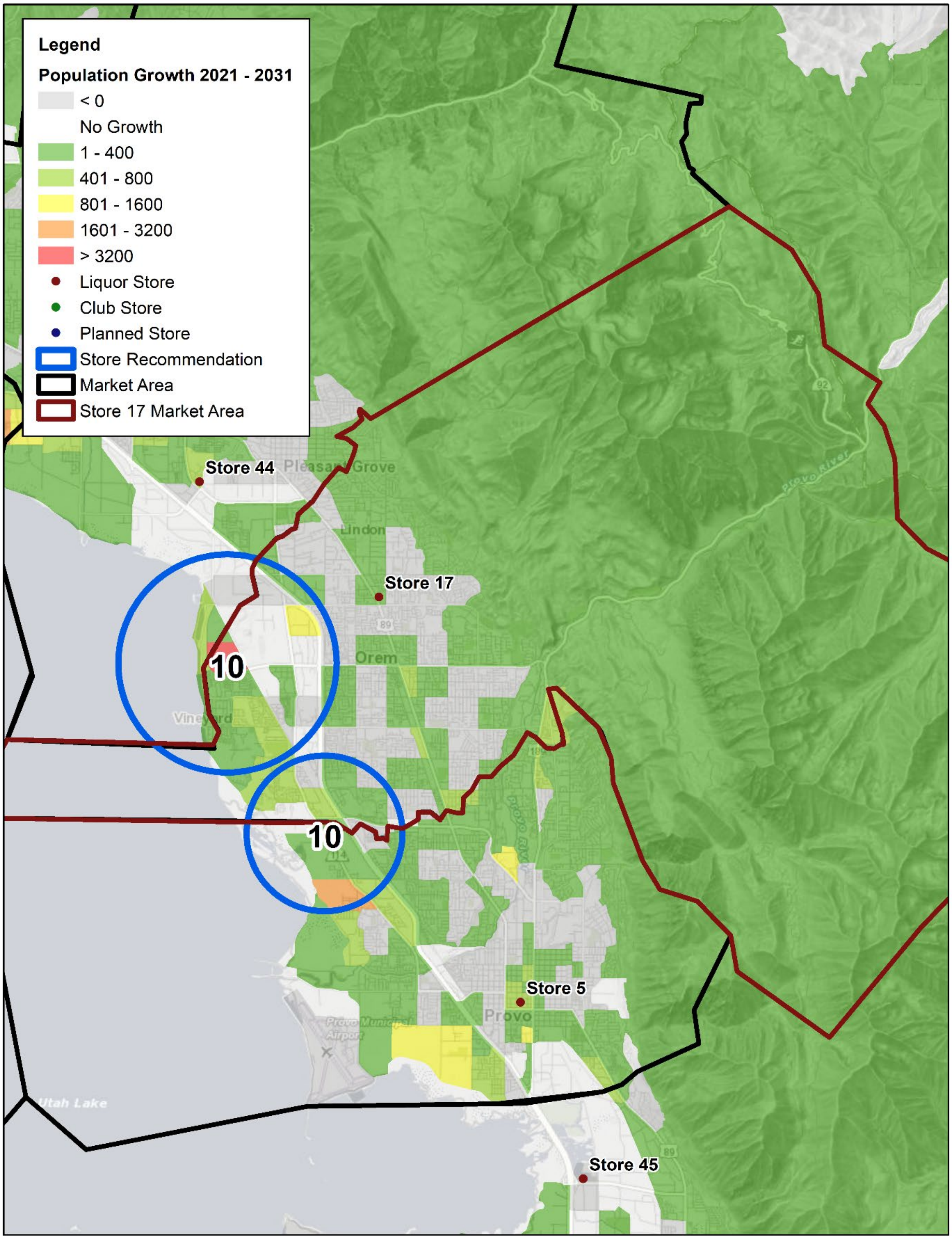


Priority 10: Store 17 – Orem

The Orem market area has the 8th largest 2021 population and the 7th largest 2031 estimated population. Distribution of the current population supports the location of the current store, but the recommendation for a new store close to recent growth in Vineyard could capture more sales.

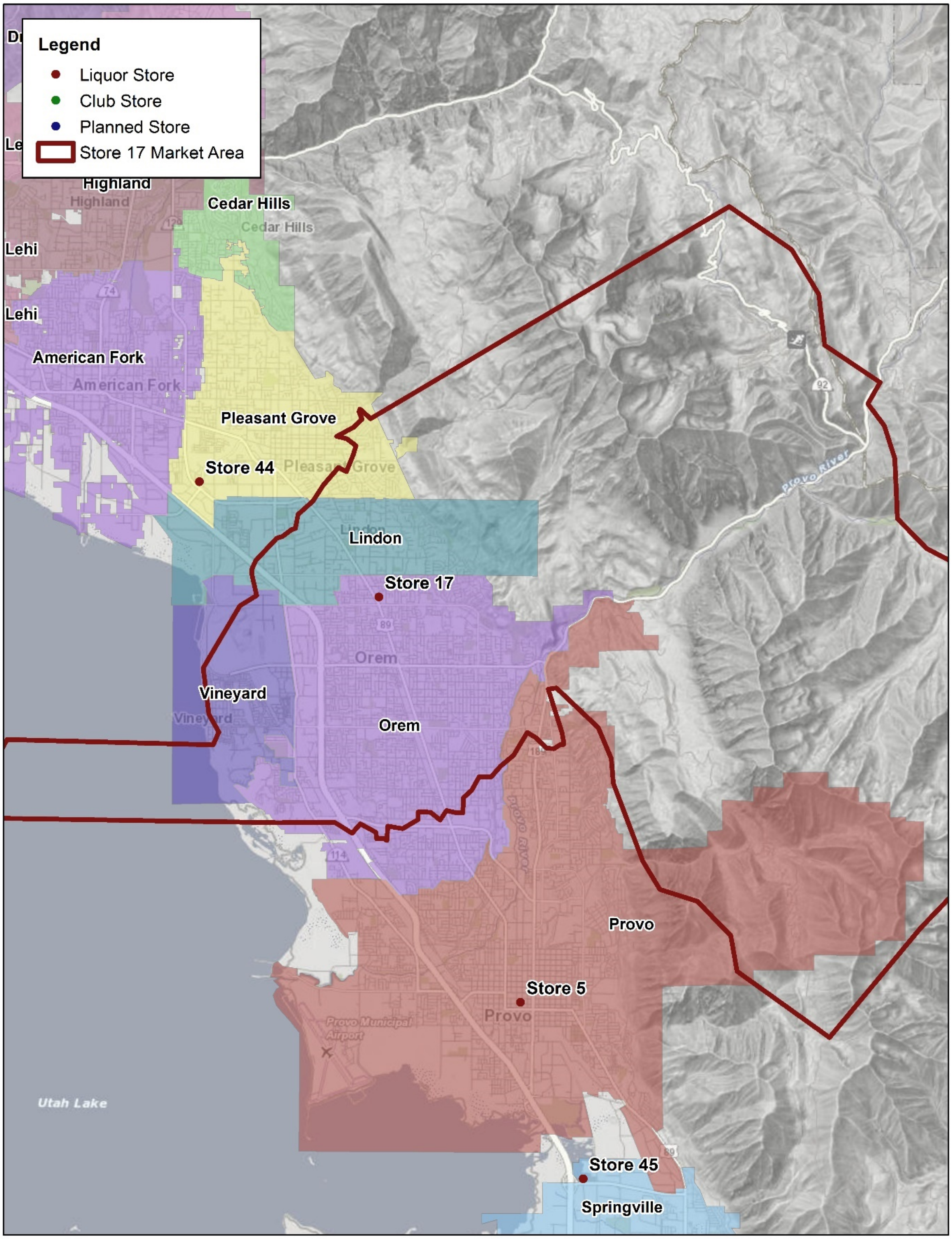


Future growth also shows that Vineyard would be a suitable place for a new liquor store. The addition of a frontrunner station in the area will compound upon the already high growth. It should be noted that Orem, like other Utah County stores, does not fare well in transactions per capita. However, it performs above average in bottles per hour.



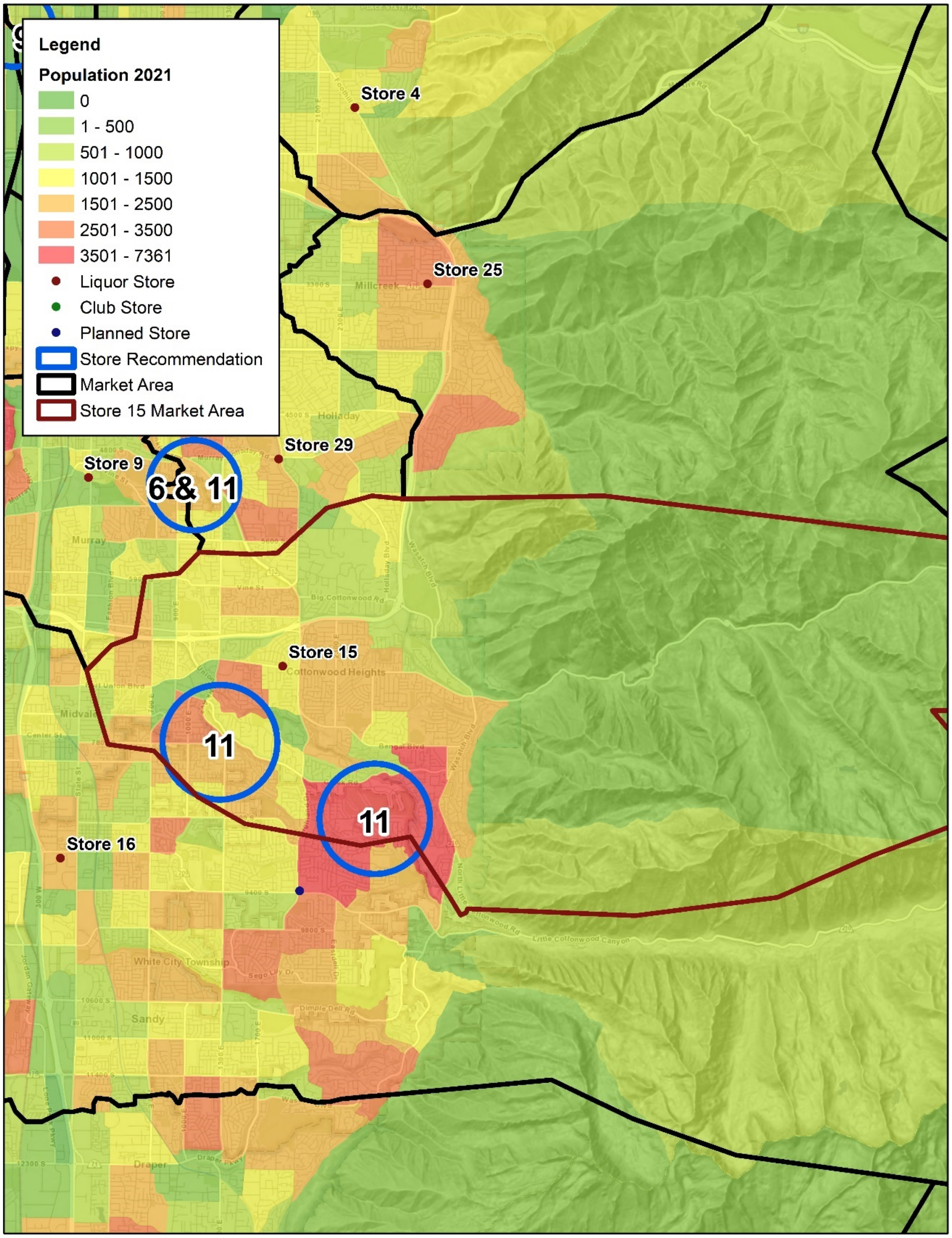
Municipalities located in this market area include:

- Pleasant Grove
- Lindon
- Vineyard
- Orem
- Provo

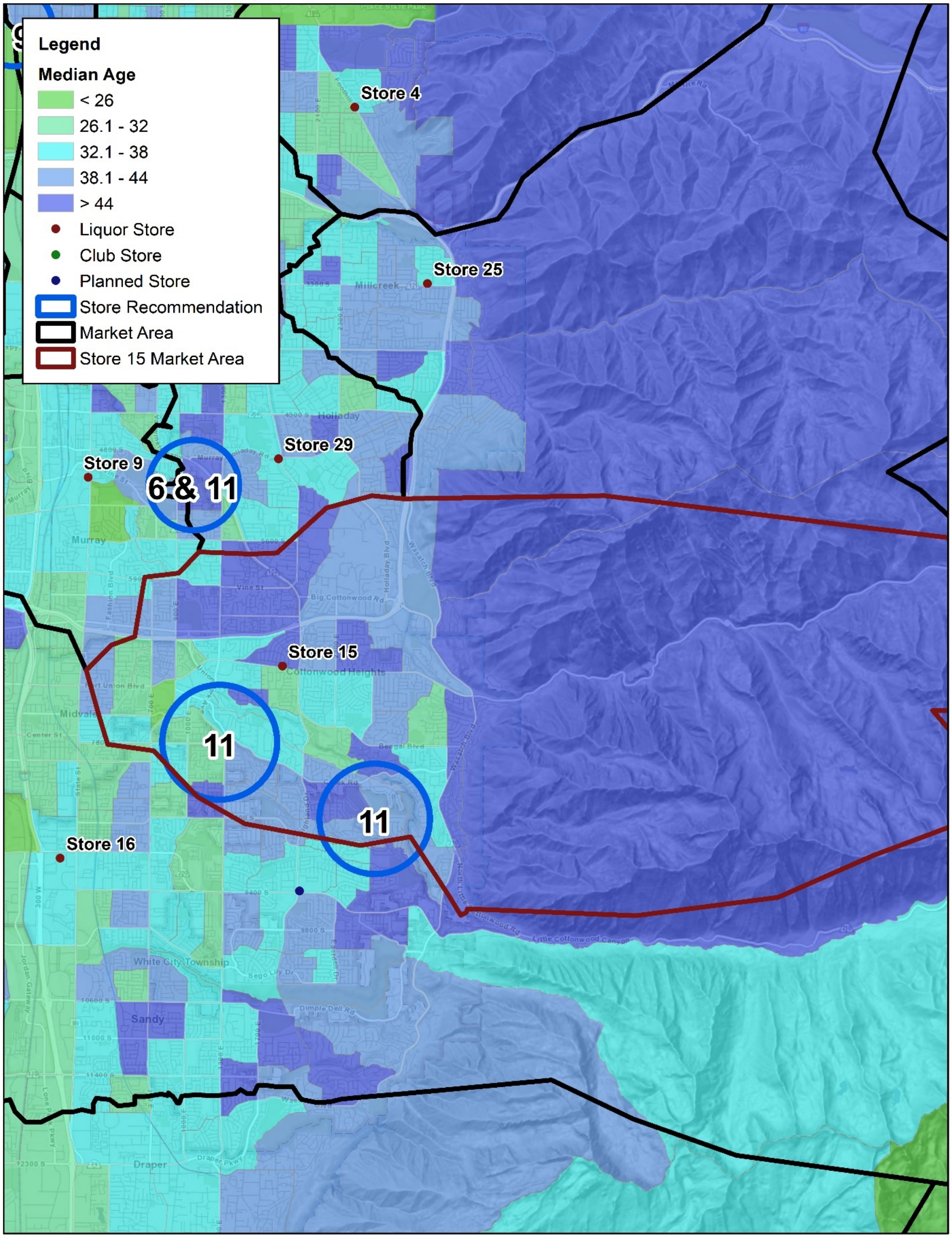


Priority 11: Store 15 – Cottonwood Heights

Store 15 ranks middle of the pack in current population and 2031 population. However, the market area is densely populated and the store ranks 13th in transactions per capita. Unlike the other recommendations on this list, Cottonwood Heights ranks highly despite being only slightly higher than average across the board.

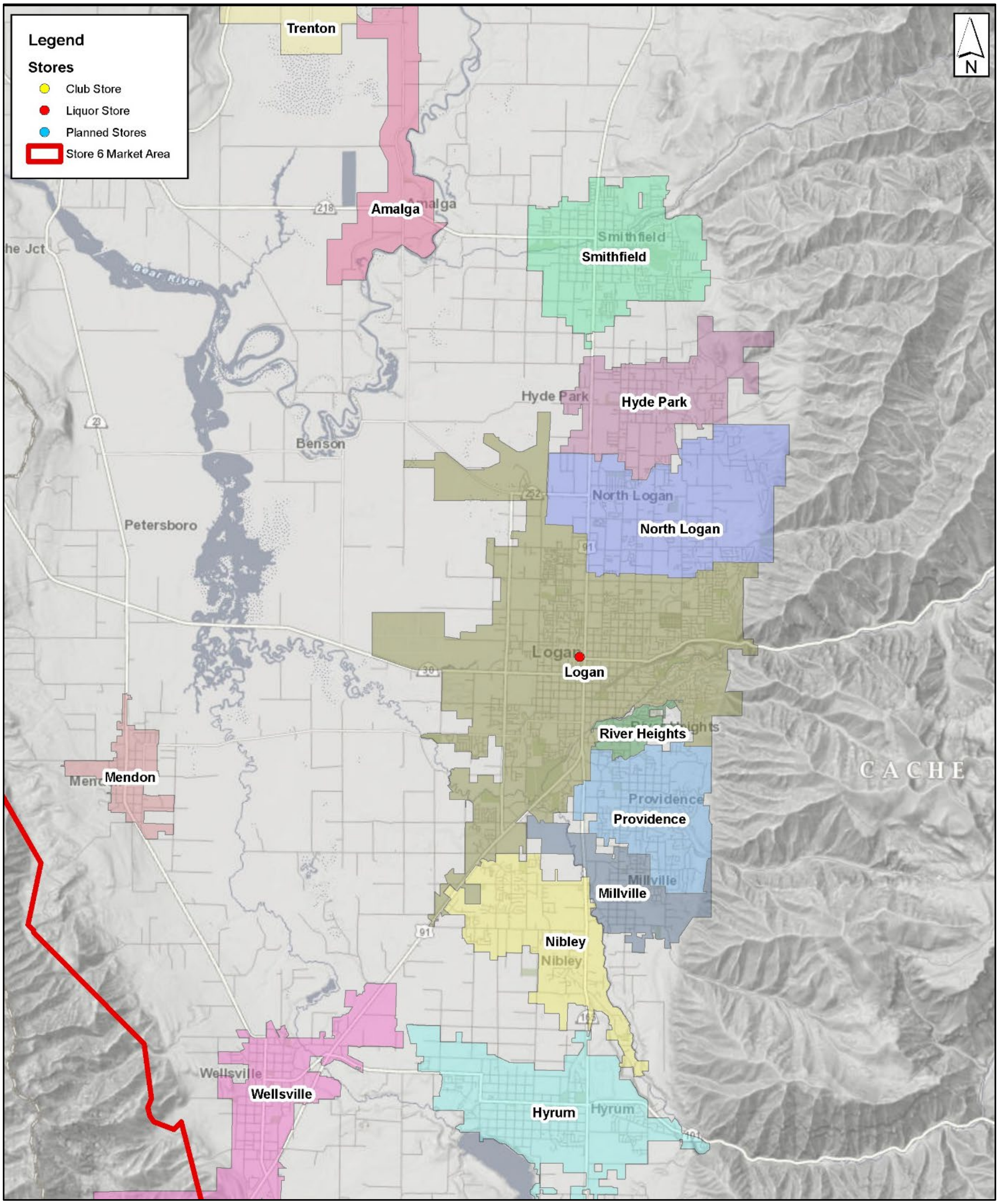


Recommendations for a future store include areas that boast higher median ages and household incomes. It should be noted that Cottonwood Heights was the leading store in terms of bottles sold and sales revenue, edging out Sandy and Park City (#38) for highest sales and bottles respectively.



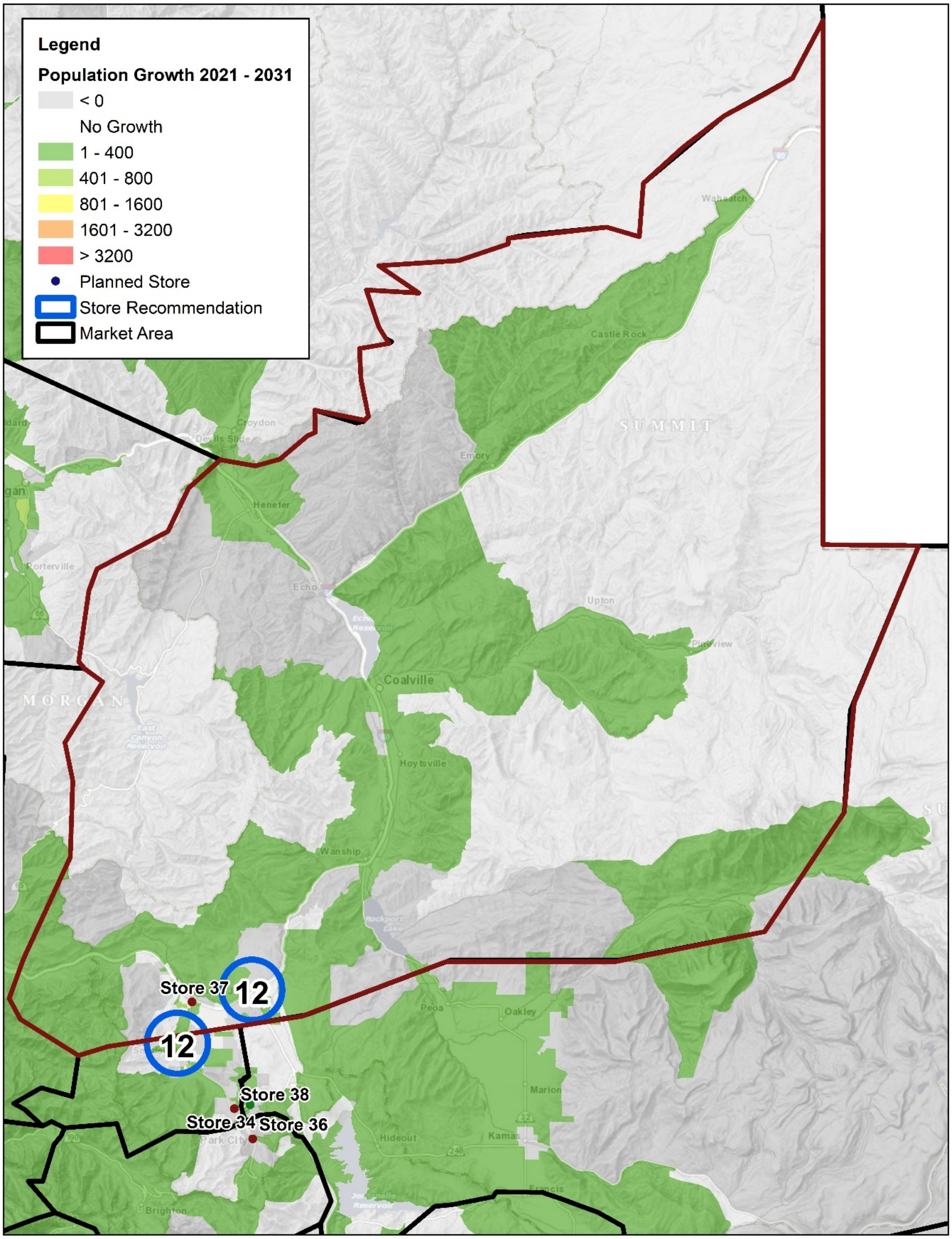
Municipalities locate in this market area include:

- Cottonwood Heights
- Holladay
- Murray
- Sandy

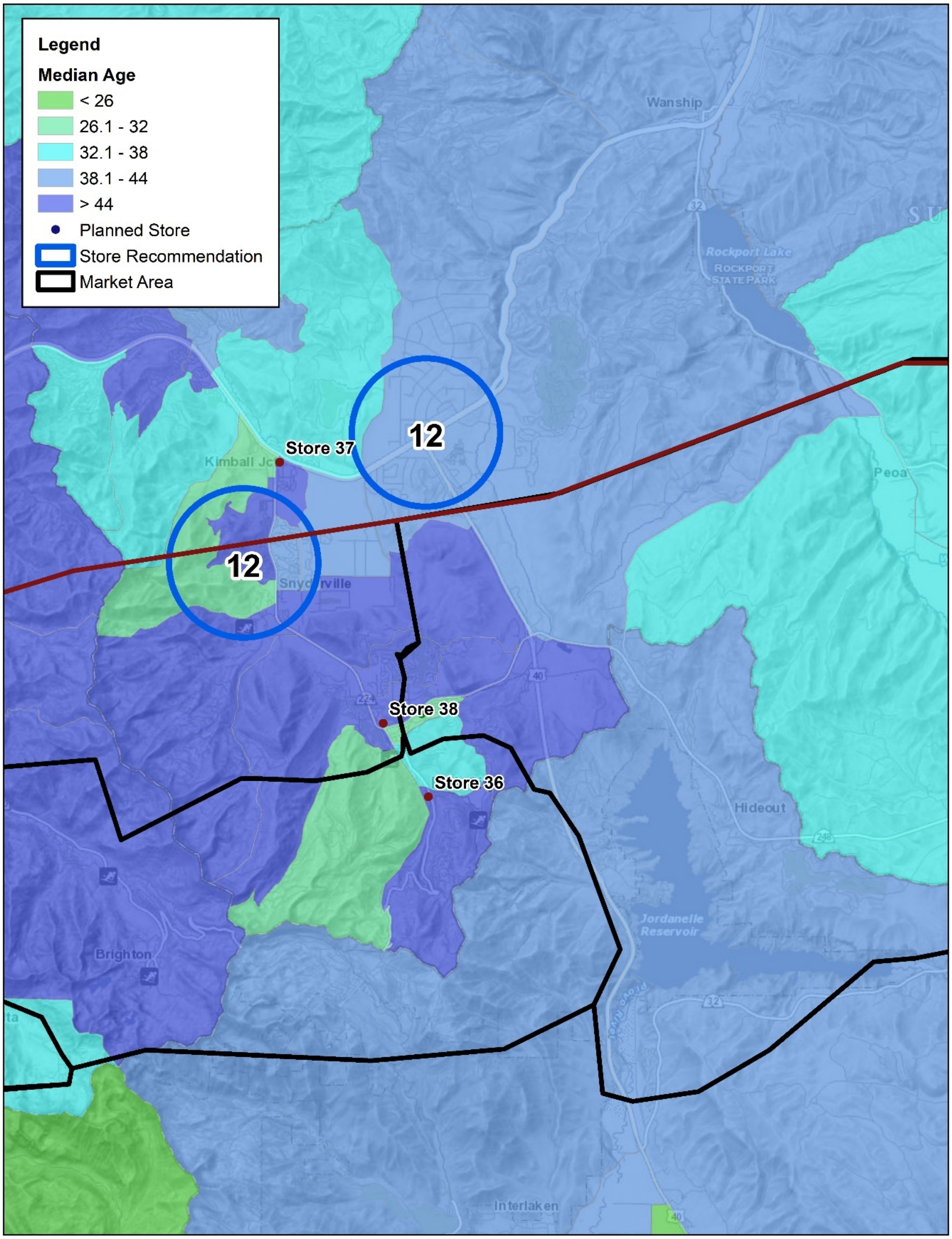


Priority 12: Store 37 – Park City (Kimball Junction)

Store 37 covers a lot of land. However, it is ranked very poorly in terms of current population, future population, and population density. In population growth, it ranks 30th – the reason it makes the list is because it ranks first in bottles per hour and fourth in transactions per capita. It is strategically located at the Junction before entering Park City, which encourages travelers to stop before continuing to the City.

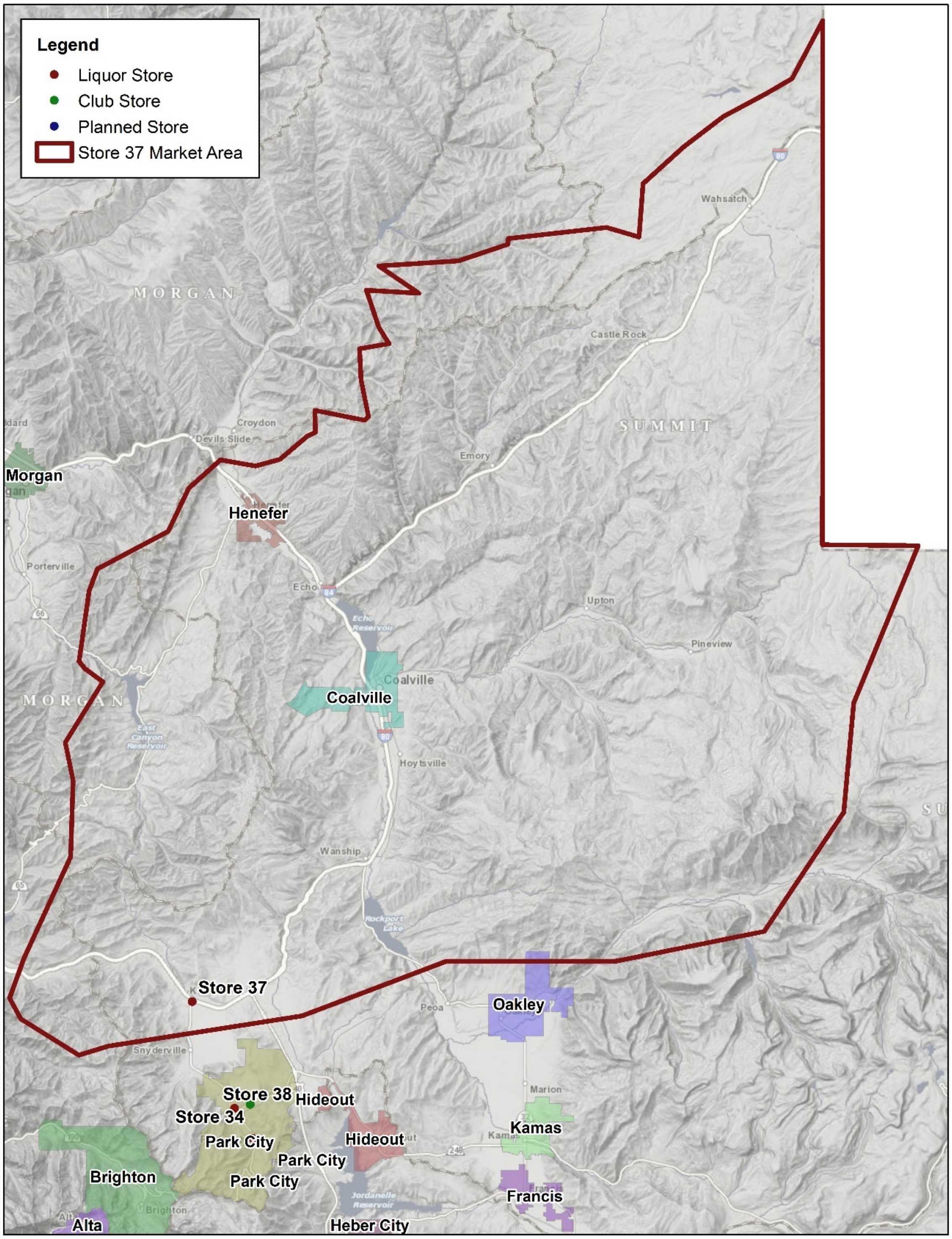


Deciding on a new store at this location could be difficult for the state. The area is not heavily populated, so it would be ideal to seek intersections for potential new stores. The areas highlighted below also fit the profile of consumers. A new store could help reduce the burden on the existing stores, which consistently rank highly in overall sales, sales per man hour, and similar metrics.



Municipalities located in this market area include:

- Oakley
- Coolville
- Henefer



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, 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 2020 to February 2021. The table below lists all the stores and their priority for relocation or expansion based on the criteria listed above.

Table 21: Priority for Store Relocation or Expansion Priorities

Priority	Store	City	Address	Rank
1	38	Park City	1550 Snow Creek	7.5
2	2	Salt Lake City	1154 Ashton Avenue	8.0
3	15	Cottonwood Heights	1863 East 7000 South	9.5
4	9	Murray	5056 South State	9.8
5	25	Millcreek	3255 East 3300 South	10.3
6	12	Salt Lake City	402 East 6th Ave.	12.5
7	29	Holladay	1814 E Murray Holladay Road	12.5
8	37	Park City	1612 Ute Blvd.	13.5
9	41	Salt Lake City	280 West Harris Ave.	13.8
10	1	Salt Lake City	205 West 400 South	16.5
11	16	Sandy	125 West 9000 South	16.5
12	21	Harrisville	484 North Wall Ave.	17.0
13	3	West Valley City	3381 S. Redwood Road	17.3
14	19	Ogden	3802 Pacific Ave.	17.8
15	24	Ogden	1156 Patterson Ave.	17.8
16	46	West Valley City	1552 North 1750 West	18.3
17	35	Salt Lake City	255 South 300 East	18.8
18	30	Layton	625 West 600 North	19.8
19	4	Salt Lake City	1615 Foothill Blvd	20.0
20	31	Draper	14445 South Minuteman Drive	20.0
21	27	Moab	55 West 200 South	20.3
22	44	Pleasant Grove	671 Pleasant Grove Blvd	20.5
23	13	Salt Lake City	1255 West North Temple	21.3
24	39	St. George	161 North 900 East	21.5
25	8	Bountiful	520 North 500 West	22.0
26	14	Salt Lake City	63 E. Miller Avenue	22.3
27	23	Roy	5948 South 1900 West	22.5
28	36	Park City	460 Swede Aly St. 100	24.0
29	48	Herriman	5278 West Anthem Lane	25.0
30	43	Heber City	262 East Gateway Dr.	26.3

Priority	Store	City	Address	Rank
31	26	Taylorsville	3905 West 5400 South	26.5
32	40	Riverton	13332 So. Market Center Dr.	28.0
33	11	Magna	7250 West 3500 South	29.0
34	6	Logan	75 West 400 North	30.3
35	42	Hurricane	202 North Foothill Canyon Dr.	31.3
36	47	Syracuse	865 w 1700s	32.3
37	32	St. George	929 West Sunset Blvd.	34.0
38	17	Orem	1688 North State Street	34.0
39	10	Tooele	433 North Main	34.3
40	28	Vernal	675 East Main	35.5
41	45	Springville	1551 North 1750 West	37.8
42	18	Cedar City	1580 S Providence Center Dr	38.3
43	22	Brigham City	43 South 100 West	39.8
44	5	Provo	166 S. Freedom Blvd.	40.8
45	7	Price	50 North 100 West	41.5
46	49	Saratoga Springs	1285 N Exchange Dr.	45.8
47	50	Farmington	579 Lagoon Dr.	47.0

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 create a greater burden on these stores.

Table 22: Top Stores by Sales per Square Foot

Store	Address	City	Sales per Sq. Ft.	Store Size (Square Feet)
35	255 South 300 East	Salt Lake City	$3,511.77	2,500
23	5948 South 1900 West	Roy	$2,070.74	3,843
38	1550 Snow Creek	Park City	$1,987.38	10,000
44	671 Pleasant Grove Blvd	Pleasant Grove	$1,964.35	6,000
30	625 West 600 North	Layton	$1,725.11	5,782
		Average – Top 5 Stores	**$2,252**	**5,625**
		Average – All Stores	**$1,145**	**9,023**

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, or rural areas with a large tourist presence. The sales per capita for the top five stores is close to 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 2021 population, and the fifth in sales per capita is not far behind at sixth lowest in population.

Table 23: Top Stores by Sales per Capita

Store	Address	City	Sales per Capita
38	1550 Snow Creek	Park City	$2,991.98
41	280 West Harris Ave.	Salt Lake City	$973.73
36	460 Swede Aly St. 100	Park City	$907.56
37	1612 Ute Blvd.	Park City	$688.03
25	3255 East 3300 South	Millcreek	$503.72
		Average – Top 5 Stores	**$1,213**
		Average – All Stores	**$255**

Total Transactions

The top producing stores by total transactions on average have over 125,000 transactions more than the average store.

Table 24: Top Stores by Total Transactions

Store	Address	City	Transactions
16	125 West 9000 South	Sandy	385,241
3	3381 S. Redwood Road	West Valley City	333,524
15	1863 East 7000 South	Cottonwood Heights	314,538
46	1552 North 1750 West	West Valley City	305,602
21	484 North Wall Ave.	Harrisville	305,225
		Average – Top 5 Stores	**328,826**
		Average – All Stores	**203,122**

Transactions per Capita

Likewise, transactions per capita is a good indicator of store performance. Beyond expected locations in Salt Lake City, Park City stores have higher transactions per capita. This is because while the native population is low, there is a large influx of people who do not live in the area but who purchase alcohol while visiting.

Table 25: Top Stores by Transactions per Capita

Store	Address	City	Transactions per Capita
38	1550 Snow Creek	Park City	31.5
36	460 Swede Aly St. 100	Park City	17.2
41	280 West Harris Ave.	Salt Lake City	10.6
37	1612 Ute Blvd.	Park City	9.3
12	402 East 6th Ave.	Salt Lake City	8.8
		Average – Top 5 Stores	**15.5**
		Average – All Stores	**4.5**

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 more feasible options, 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, almost two out of three stores ranked in the top 12 in bottles per man hour. At 30 percent, this was the highest weighted factor in the New Store analysis 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 improve the customer experience. Stores with higher sales per square foot make up a couple of the priorities for new stores; these stores may experience increased strain in the future as populations increase in market areas.

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 adjusting 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 26: 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	1,059,122
34	Park City	Club Store	$16,527,696	620,529
39	St. George	Liquor Store	$1,351,588	112,874
16	Sandy	Liquor Store	$1,094,619	100,900
29	Holladay	Liquor Store	$920,959	97,957

Store	City	Store Type	Licensee Sales	Licensee Bottles
42	Hurricane	Liquor Store	$1,314,680	97,510
27	Moab	Liquor Store	$1,034,144	96,138
24	Ogden	Liquor Store	$824,390	87,456
15	Cottonwood Heights	Liquor Store	$659,209	65,189
1	Salt Lake City	Liquor Store	$822,719	62,792
41	Salt Lake City	Liquor Store	$1,165,854	59,700
19	Ogden	Liquor Store	$598,225	56,163
18	Cedar City	Liquor Store	$442,665	48,158
35	Salt Lake City	Liquor Store	$979,229	44,209
9	Murray	Liquor Store	$335,465	41,225
43	Heber City	Liquor Store	$403,755	34,050
6	Logan	Liquor Store	$348,912	32,980
31	Draper	Liquor Store	$424,177	31,801
38	Park City	Liquor Store	$609,807	31,485
25	Millcreek	Liquor Store	$226,985	26,569
46	West Valley City	Liquor Store	$324,940	25,630
21	Harrisville	Liquor Store	$324,596	25,498
44	Pleasant Grove	Liquor Store	$303,590	24,837
45	Springville	Liquor Store	$333,826	23,034
8	Bountiful	Liquor Store	$272,474	23,013
12	Salt Lake City	Liquor Store	$169,568	22,731
28	Vernal	Liquor Store	$276,790	22,435
48	Herriman	Liquor Store	$256,890	21,586
30	Layton	Liquor Store	$275,369	20,278
5	Provo	Liquor Store	$228,116	19,510
13	Salt Lake City	Liquor Store	$240,667	18,757
40	Riverton	Liquor Store	$220,591	18,050
2	Salt Lake City	Liquor Store	$147,763	15,512
26	Taylorsville	Liquor Store	$202,919	14,937
10	Tooele	Liquor Store	$278,943	12,850
17	Orem	Liquor Store	$163,106	12,819
47	Syracuse	Liquor Store	$148,509	12,166
32	St. George	Liquor Store	$146,013	10,817
3	West Valley City	Liquor Store	$113,446	10,082
11	Magna	Liquor Store	$139,774	9,358
14	Salt Lake City	Liquor Store	$128,369	8,426
37	Park City	Liquor Store	$113,919	8,121
23	Roy	Liquor Store	$97,439	7,610
36	Park City	Liquor Store	$59,691	4,427
22	Brigham City	Liquor Store	$62,837	3,929
7	Price	Liquor Store	$41,075	3,472
49	Saratoga Springs	Liquor Store	$30,598	2,309
4	Salt Lake City	Liquor Store	$22,363	2,222
50	Farmington	Liquor Store	$16,563	776
	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. Overall sales were noticeably lower due to the COVID-19 pandemic, but still represent expected variation across all state stores. 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 – which sold more than any other single regular store, 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 one or more of these areas could serve both the needs of licensees and regular customers.

Table 27: Licensee Sales and Bottles Sold for Clustered Market Areas

Store	Location	Licensee Sales	Licensee Bottles
Salt Lake City, Holladay, Sandy, & Cottonwood Heights			
16	Sandy	$1,094,619	100,900
29	Holladay	$920,959	97,957
15	Cottonwood Heights	$659,209	65,189
01	Salt Lake City	$822,719	62,792
41	Salt Lake City	$1,165,854	59,700
35	Salt Lake City	$979,229	44,209
12	Salt Lake City	$169,568	22,731
13	Salt Lake City	$240,667	18,757
02	Salt Lake City	$147,763	15,512
14	Salt Lake City	$128,369	8,426
04	Salt Lake City	$22,363	2,222
	Total	**$6,351,319**	**498,395**
St. George, Hurricane, & Cedar City			
39	St. George	$1,351,588	112,874
42	Hurricane	$1,314,680	97,510
18	Cedar City	$442,665	48,158
32	St. George	$146,013	10,817
	Total	**$3,254,946**	**269,359**
Ogden, Harrisville, & Roy			
24	Ogden	$824,390	87,456
19	Ogden	$598,225	56,163
21	Harrisville	$324,596	25,498

Store	Location	Licensee Sales	Licensee Bottles
Salt Lake City, Holladay, Sandy, & Cottonwood Heights			
23	Roy	$97,439	7,610
	Total	**$1,844,650**	**176,727**

Evaluation of Retail Sales and Economic Impacts

The purpose of the tasks in this section is to compare performance between existing retail outlets 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 $700 more per square foot than the average store. Several 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 serve a demographic with a slightly higher median age.

Table 28: 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)	Median Income	Per Capita Income	Median Age
35	Salt Lake City	$3,511.77	2,500	3.25	10,172	18,215	$48,945.22	$36,354.57	30.8
23	Roy	$2,070.74	3,843	219.45	450	210	$70,815.72	$27,943.07	36.2
38	Park City	$1,987.38	10,000	29.88	222	293	$141,503.70	$97,825.54	49.0
44	Pleasant Grove	$1,964.35	6,000	103.23	1,241	700	$107,378.09	$34,215.29	28.0
30	Layton	$1,725.11	5,782	143.02	753	423	$68,640.74	$24,001.52	24.6
02	Salt Lake City	$1,703.17	7,263	6.54	6,742	3,370	$83,101.82	$43,440.68	34.5
16	Sandy	$1,627.44	11,918	67.80	2,286	2,003	$120,585.38	$51,287.90	37.5
09	Murray	$1,589.58	7,000	10.42	4,960	5,862	$65,382.62	$29,370.27	34.5
25	Millcreek	$1,586.88	8,490	82.97	322	113	$113,736.12	$68,693.90	45.8
04	Salt Lake City	$1,559.43	4,239	46.27	630	778	$120,949.90	$63,793.30	43.5
14	Salt Lake City	$1,489.92	2,768	6.28	5,604	6,393	$51,662.37	$27,041.63	33.4
21	Harrisville	$1,398.45	8,000	488.03	206	114	$70,764.08	$30,063.26	36.7
Average – Top 12 Stores		**$1,851**	**6,484**	**100.60**	**2,799**	**3,206**	**$88,622**	**$39,245**	**36.2**
Average – All Stores		**$1,145**	**9,023**	**1,791**	**1,636**	**1,742**	**$80,345**	**$33,148**	**35.4**

On the other hand, stores with lower sales per square foot generally are larger stores, 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 29: 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
36	Park City	$228.19	8,177	50.43	41	192	$107,475.79	$66,579.66	44.3
18	Cedar City	$470.51	13,960	18,399.60	5	2	$56,610.95	$25,361.76	37.5
42	Hurricane	$556.54	12,362	1,315.38	34	16	$51,486.57	$29,727.57	40.4
43	Heber City	$623.45	12,980	1,984.34	19	8	$67,971.94	$39,172.57	41.7
10	Tooele	$635.87	11,375	11,230.82	8	2	$65,807.12	$29,270.92	41.6
47	Syracuse	$637.72	12,286	186.57	384	169	$70,659.63	$23,715.56	25.5
45	Springville	$685.75	12,586	4,893.91	45	21	$65,713.83	$24,950.27	36.6
7	Price	$700.08	3,516	9,673.58	5	2	$55,099.07	$25,028.77	40.1
5	Provo	$706.87	6,004	57.31	2,188	1,769	$79,209.45	$27,357.58	26.4
40	Riverton	$773.14	12,600	23.75	3,067	1,086	$114,618.70	$35,701.61	31.1
13	Salt Lake City	$863.37	8,558	93.02	460	855	$51,780.52	$18,469.58	24.5
22	Brigham City	$886.16	3,517	5,902.01	9	5	$52,686.96	$25,211.55	32.8
Average – Bottom 12 Stores		**$588**	**9,827**	**4,484**	**522**	**344**	**$69,927**	**$30,879**	**35.2**
Average – All Stores		**$1,145**	**9,023**	**1,791**	**1,636**	**1,742**	**$80,345**	**$30,063**	**35.4**

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 three categories: areas of high population or employment density, areas with higher household or per capita incomes, and areas with a strong tourist presence. Based on these results, it appears that the more successful stores, on a sales per capita basis, generally have higher median ages than other areas.

Table 30: 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	$2,991.98	222	293	$156,045.15	$97,825.54	49.0
41	Salt Lake City	$973.73	5,308	10,392	$47,756.57	$24,625.19	33.9
36	Park City	$907.56	41	194	$96,688.60	$66,579.66	44.3
37	Park City	$688.03	25	19	$114,195.36	$32,983.25	34.7
25	Millcreek	$503.72	322	113	$100,417.03	$68,693.90	45.8
12	Salt Lake City	$398.15	634	689	$97,321.26	$74,035.47	44.2
29	Holladay	$370.29	5,236	3,370	$82,301.14	$44,186.32	38.9
2	Salt Lake City	$280.37	6,742	12,331	$50,973.47	$43,440.68	34.5
15	Cottonwood Heights	$276.73	1,316	18,215	$47,936.35	$77,862.68	46.7
1	Salt Lake City	$267.49	5,953	2,508	$79,450.01	$52,441.06	36.3
35	Salt Lake City	$265.37	10,172	778	$107,508.40	$36,354.57	30.8
4	Salt Lake City	$226.87	630	8	$83,894.29	$63,793.30	43.5
Average – Top 12		**$665**	**3,050**	**4,076**	**$88,707**	**$56,902**	**40.2**
Average – All Stores		**$255**	**1,636**	**1,742**	**$80,345**	**$30,063**	**35.4**

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 indicate that these stores have a high demand placed on employees.

Table 31: Sales per Man Hour

Store	Address	City	Square Feet	Sales: March 2020 – Feb. 2021	Hours	Sales per Hour
38	1550 Snow Creek	Park City	10,000	$19,873,828	17,583	$1,130.27
37	1612 Ute Blvd.	Park City	12,081	$15,204,835	14,649	$1,037.94
41	280 West Harris Ave.	Salt Lake City	12,517	$15,868,118	16,922	$937.75
25	3255 East 3300 South	Millcreek	8,490	$13,472,633	15,969	$843.69
08	520 North 500 West	Bountiful	13,139	$13,100,260	16,021	$817.68
29	1814 E Murray Holladay Road	Holladay	12,895	$15,127,425	18,812	$804.14
24	1156 Patterson Ave.	Ogden	9,000	$10,427,557	13,008	$801.64
44	671 Pleasant Grove Blvd	Pleasant Grove	6,000	$11,786,080	14,771	$797.95
31	14445 South Minuteman Drive	Draper	13,183	$14,786,920	18,775	$787.59
12	402 East 6th Ave.	Salt Lake City	7,068	$9,501,183	12,538	$757.79
39	161 North 900 East	St. George	10,065	$10,819,037	14,596	$741.25
10	433 North Main	Tooele	11,375	$7,233,063	9,770	$740.33
21	484 North Wall Ave.	Harrisville	8,000	$11,187,636	15,128	$739.56
23	5948 South 1900 West	Roy	3,843	$7,957,853	11,320	$703.02
43	262 East Gateway Dr.	Heber City	12,980	$8,092,432	11,523	$702.30
15	1863 East 7000 South	Cottonwood Heights	14,592	$19,920,045	29,007	$686.73
42	202 North Foothill Canyon Dr.	Hurricane	12,362	$6,879,914	10,239	$671.95
18	1580 S Providence Center Dr	Cedar City	13,960	$6,568,269	9,960	$659.48
16	125 West 9000 South	Sandy	11,918	$19,395,845	29,465	$658.27
13	1255 West North Temple	Salt Lake City	8,558	$7,388,742	11,305	$653.57
03	3381 S. Redwood Road	West Valley City	11,782	$10,969,120	16,835	$651.58
35	255 South 300 East	Salt Lake City	2,500	$8,779,415	13,476	$651.47
45	1551 North 1750 West	Springville	12,586	$8,630,840	13,573	$635.91
17	1688 North State Street	Orem	5,800	$6,696,302	10,538	$635.44
30	625 West 600 North	Layton	5,782	$9,974,569	15,949	$625.39
48	5278 West Anthem Lane	Herriman	13,600	$12,268,148	19,828	$618.74
40	13332 So. Market Center Dr.	Riverton	12,600	$9,741,563	15,899	$612.70
19	3802 Pacific Ave.	Ogden	6,300	$8,554,718	14,110	$606.30
11	7250 West 3500 South	Magna	6,242	$6,536,775	11,076	$590.19

Store	Address	City	Square Feet	Sales: March 2020 – Feb. 2021	Hours	Sales per Hour
26	3905 West 5400 South	Taylorsville	11,670	$10,385,640	17,987	$577.41
04	1615 Foothill Blvd	Salt Lake City	4,239	$6,610,433	11,678	$566.07
46	1552 North 1750 West	West Valley City	13,600	$12,814,721	22,825	$561.45
06	75 West 400 North	Logan	7,282	$9,008,336	16,148	$557.86
02	1154 Ashton Avenue	Salt Lake City	7,263	$12,370,147	22,363	$553.16
09	5056 South State	Murray	7,000	$11,127,068	20,345	$546.91
27	55 West 200 South	Moab	4,214	$5,660,366	11,098	$510.03
47	865 w 1700s	Syracuse	12,286	$7,835,049	15,455	$506.97
32	929 West Sunset Blvd.	St. George	4,740	$4,928,048	9,902	$497.67
14	63 E. Miller Avenue	Salt Lake City	2,768	$4,124,105	8,872	$464.86
22	43 South 100 West	Brigham City	3,517	$3,116,614	7,208	$432.37
05	166 S. Freedom Blvd.	Provo	6,004	$4,244,061	10,075	$421.25
28	675 East Main	Vernal	3,738	$3,978,184	9,774	$407.03
49	1285 N Exchange Dr.	Saratoga Springs	13,500	$2,321,947	6,035	$384.73
01	205 West 400 South	Salt Lake City	8,129	$7,735,468	22,468	$344.28
07	50 North 100 West	Price	3,516	$2,461,465	7,273	$338.46
36	460 Swede Aly St. 100	Park City	8,177	$1,865,928	6,862	$271.93
50	579 Lagoon Dr.	Farmington	13,200	$317,741	2,031	$156.48

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[4]

Sales at liquor stores in Utah range between a high of $3,512 and a low of $24 per square foot as shown in the following table.

Table 32: Store Sales per Square Foot

Store	Street Address	City	Square Feet	Sales: March 2020 thru Feb 2021	Sales per Sq Ft
35	255 South 300 East	Salt Lake City	2,500	$8,779,415	$3,511.77

[4] Various sources, including company 10-K reports

Store	Street Address	City	Square Feet	Sales: March 2020 thru Feb 2021	Sales per Sq Ft
23	5948 South 1900 West	Roy	3,843	$7,957,853	$2,070.74
38	1550 Snow Creek	Park City	10,000	$19,873,828	$1,987.38
44	671 Pleasant Grove Blvd	Pleasant Grove	6,000	$11,786,080	$1,964.35
30	625 West 600 North	Layton	5,782	$9,974,569	$1,725.11
2	1154 Ashton Avenue	Salt Lake City	7,263	$12,370,147	$1,703.17
16	125 West 9000 South	Sandy	11,918	$19,395,845	$1,627.44
9	5056 South State	Murray	7,000	$11,127,068	$1,589.58
25	3255 East 3300 South	Millcreek	8,490	$13,472,633	$1,586.88
4	1615 Foothill Blvd	Salt Lake City	4,239	$6,610,433	$1,559.43
14	63 E. Miller Avenue	Salt Lake City	2,768	$4,124,105	$1,489.92
21	484 North Wall Ave.	Harrisville	8,000	$11,187,636	$1,398.45
15	1863 East 7000 South	Cottonwood Heights	14,592	$19,920,045	$1,365.13
19	3802 Pacific Ave.	Ogden	6,300	$8,554,718	$1,357.89
12	402 East 6th Ave.	Salt Lake City	7,068	$9,501,183	$1,344.25
27	55 West 200 South	Moab	4,214	$5,660,366	$1,343.23
41	280 West Harris Ave.	Salt Lake City	12,517	$15,868,118	$1,267.73
37	1612 Ute Blvd.	Park City	12,081	$15,204,835	$1,258.57
6	75 West 400 North	Logan	7,282	$9,008,336	$1,237.07
29	1814 E Murray Holladay Road	Holladay	12,895	$15,127,425	$1,173.12
24	1156 Patterson Ave.	Ogden	9,000	$10,427,557	$1,158.62
17	1688 North State Street	Orem	5,800	$6,696,302	$1,154.53
31	14445 South Minuteman Drive	Draper	13,183	$14,786,920	$1,121.67
39	161 North 900 East	St. George	10,065	$10,819,037	$1,074.92
28	675 East Main	Vernal	3,738	$3,978,184	$1,064.25
11	7250 West 3500 South	Magna	6,242	$6,536,775	$1,047.22
32	929 West Sunset Blvd.	St. George	4,740	$4,928,048	$1,039.67
8	520 North 500 West	Bountiful	13,139	$13,100,260	$997.05
1	205 West 400 South	Salt Lake City	8,129	$7,735,468	$951.59
46	1552 North 1750 West	West Valley City	13,600	$12,814,721	$942.26
3	3381 S. Redwood Road	West Valley City	11,782	$10,969,120	$931.01
48	5278 West Anthem Lane	Herriman	13,600	$12,268,148	$902.07
26	3905 West 5400 South	Taylorsville	11,670	$10,385,640	$889.94
22	43 South 100 West	Brigham City	3,517	$3,116,614	$886.16
13	1255 West North Temple	Salt Lake City	8,558	$7,388,742	$863.37
40	13332 So. Market Center Dr.	Riverton	12,600	$9,741,563	$773.14
5	166 S. Freedom Blvd.	Provo	6,004	$4,244,061	$706.87
7	50 North 100 West	Price	3,516	$2,461,465	$700.08
45	1551 North 1750 West	Springville	12,586	$8,630,840	$685.75
47	865 w 1700s	Syracuse	12,286	$7,835,049	$637.72
10	433 North Main	Tooele	11,375	$7,233,063	$635.87

Store	Street Address	City	Square Feet	Sales: March 2020 thru Feb 2021	Sales per Sq Ft
43	262 East Gateway Dr.	Heber City	12,980	$8,092,432	$623.45
42	202 North Foothill Canyon Dr.	Hurricane	12,362	$6,879,914	$556.54
18	1580 S Providence Center Dr	Cedar City	13,960	$6,568,269	$470.51
36	460 Swede Aly St. 100	Park City	8,177	$1,865,928	$228.19
49	1285 N Exchange Dr.	Saratoga Springs	13,500	$2,321,947	$172.00
50	579 Lagoon Dr.	Farmington	13,200	$317,741	$24.07
		Median	**8,558**	**$8,776,415**	**$1,075**
		Average	**9,023**	**$9,311,669**	**$1,145**

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 2020 and February 2021 (not including club stores), the total point-of-sale distribution to cities reaches 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 33: Sample Sales Tax Revenue Impacts – Store with High-Level Sales

High Sales Store – 1863 East 7000 South, Cottonwood Heights		
Total Sales (March 2020 thru February 2021)	$19,920,045	
	Sales Tax Revenues	**Tax Percentage**
State	$966,122.17	4.85%
Salt Lake County*	$49,800.11	0.25%
Cottonwood Heights*	$199,200.45	1.00%
Mass Transit	$59,760.13	0.30%
Additional Mass Transit	$49,800.11	0.25%
Transportation Infrastructure	$49,800.11	0.25%
County Option Transportation	$49,800.11	0.25%
Botanical, Cultural, Zoo Tax (County)	$19,920.04	0.10%
Total Tax Revenues	$1,444,203.24	**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 34: Sample Sales Tax Revenue Impacts - Store with Medium-Level Sales

Medium Sales Store – 255 S 300 E, Salt Lake City	
Total Sales (March 2020 thru February 2021)	$8,779,415

Medium Sales Store – 255 S 300 E, Salt Lake City		
	Sales Tax Revenues	**Tax Percentage**
State	$425,801.61	4.85%
Salt Lake County*	$21,948.54	0.25%
Salt Lake City*	$87,794.15	1.00%
Mass Transit	$26,338.24	0.30%
Additional Mass Transit	$21,948.54	0.25%
Transportation Infrastructure	$21,948.54	0.25%
County Option Transportation	$21,948.54	0.25%
Botanical, Cultural, Zoo Tax (County)	$8,779.41	0.10%
Correctional Facility	$43,897.07	0.50%
Total Tax Revenues	$680,404.63	**7.75%**

*****While Salt Lake 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.

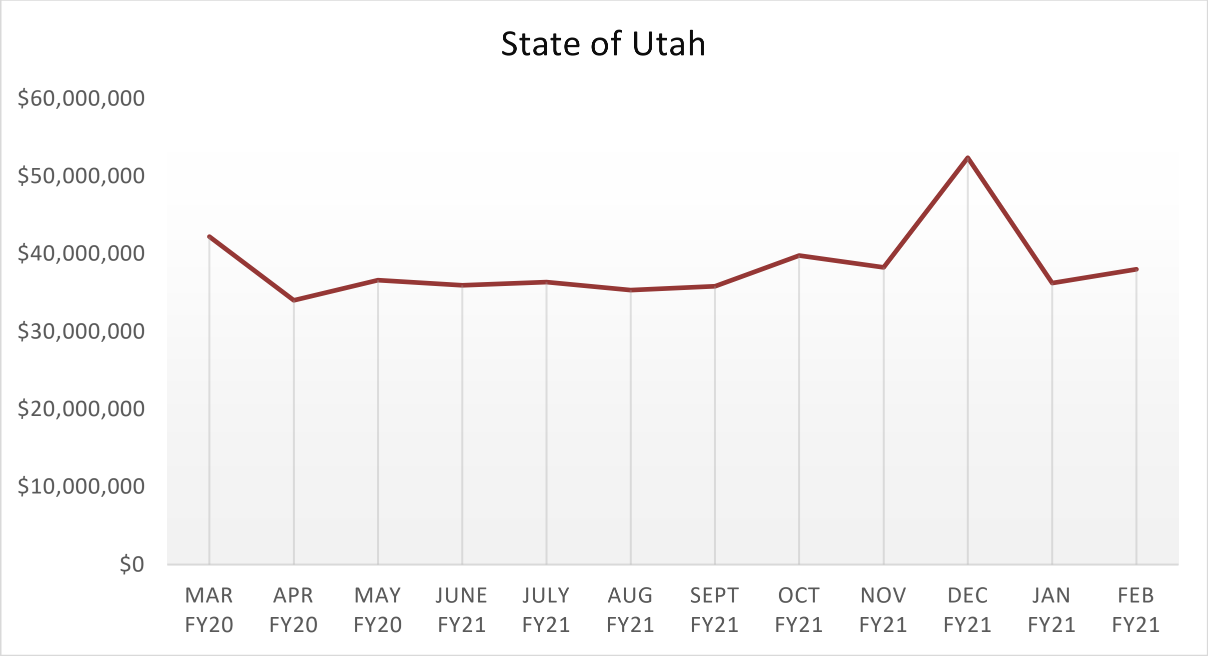
Table 35: Sample Sales Tax Revenue Impacts - Store with Low-Level Sales

Low Sales Store – 929 West Sunset Blvd., St. George		
Total Sales	$4,928,048	
	Sales Tax Revenues	**Tax Percentage**
State	$239,010.34	4.85%
Washington County	$12,320.12	0.25%
St. George City	$49,280.48	1.00%
Highway Tax	$14,784.14	0.30%
Transportation Infrastructure	$12,320.12	0.25%
Botanical, Cultural, Zoo Tax (Municipal)	$4,928.05	0.10%
Total Tax Revenues	$332,643.25	**6.75%**

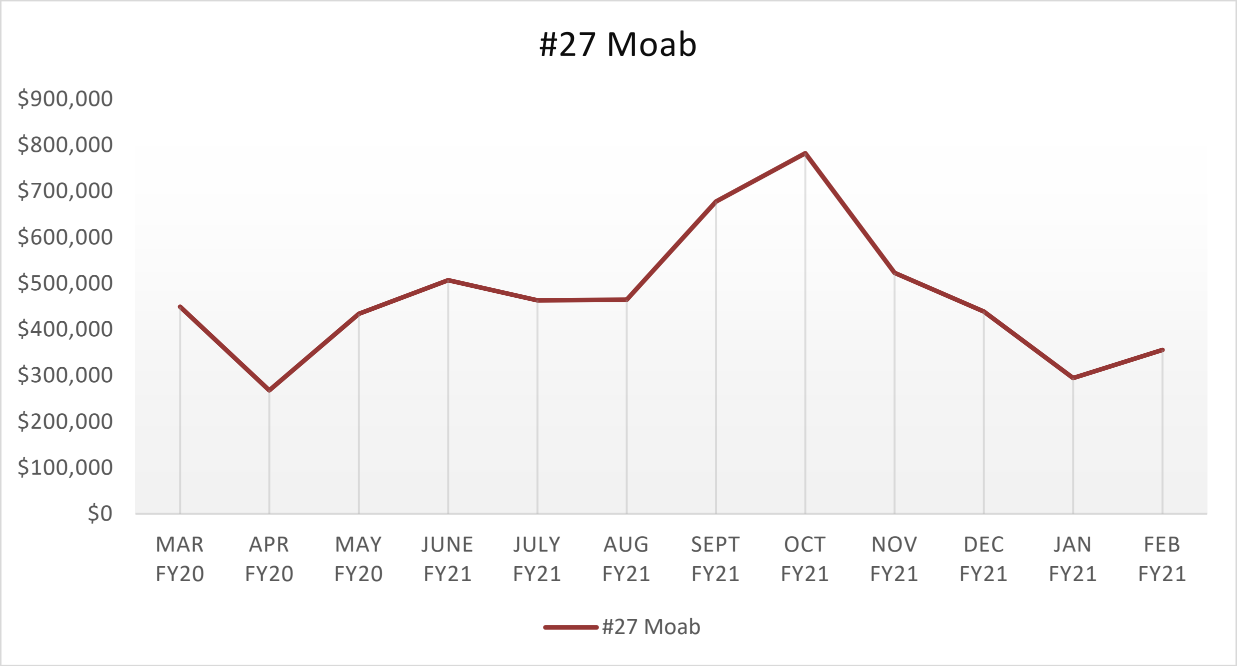
*****While St. George generates one percent through its local option rate, only one-half of that amount is returned to the City based on point of sale. The same is true for counties who receive only one-half of the amount generated by their sales tax rate based on point of sale.

Seasonality and Tourism Impacts

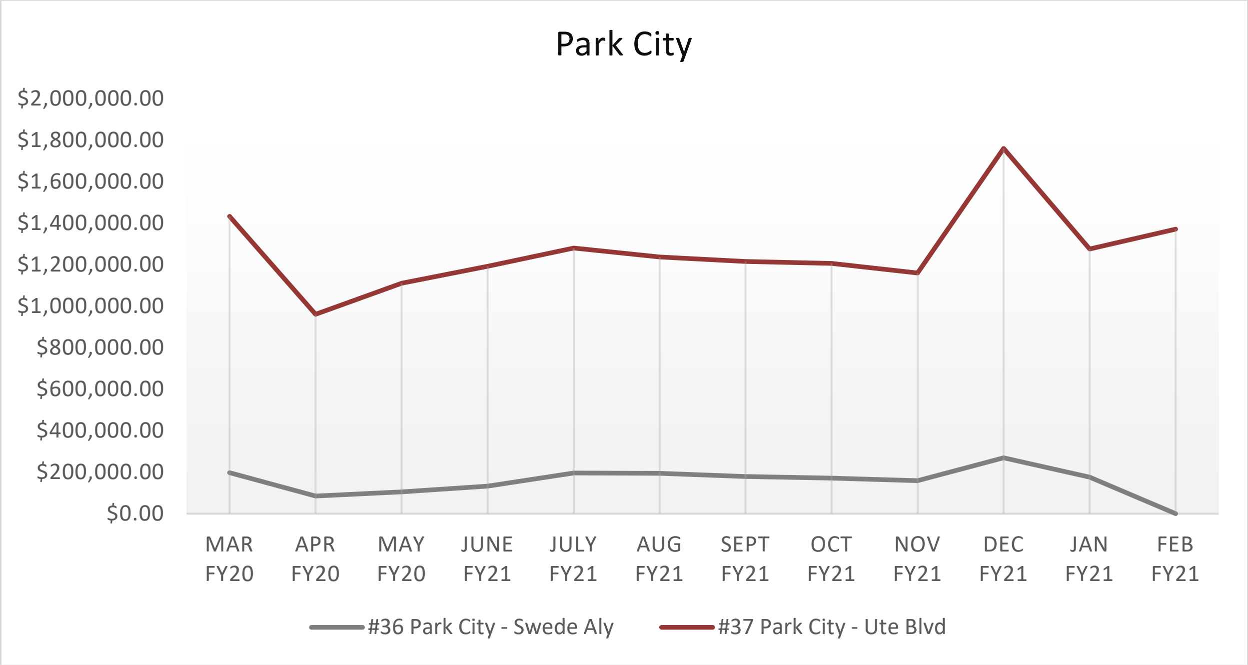
Liquor store sales statewide show some seasonality, with increased sales during the holiday season. There was some difference in this metric in 2020 from other years.



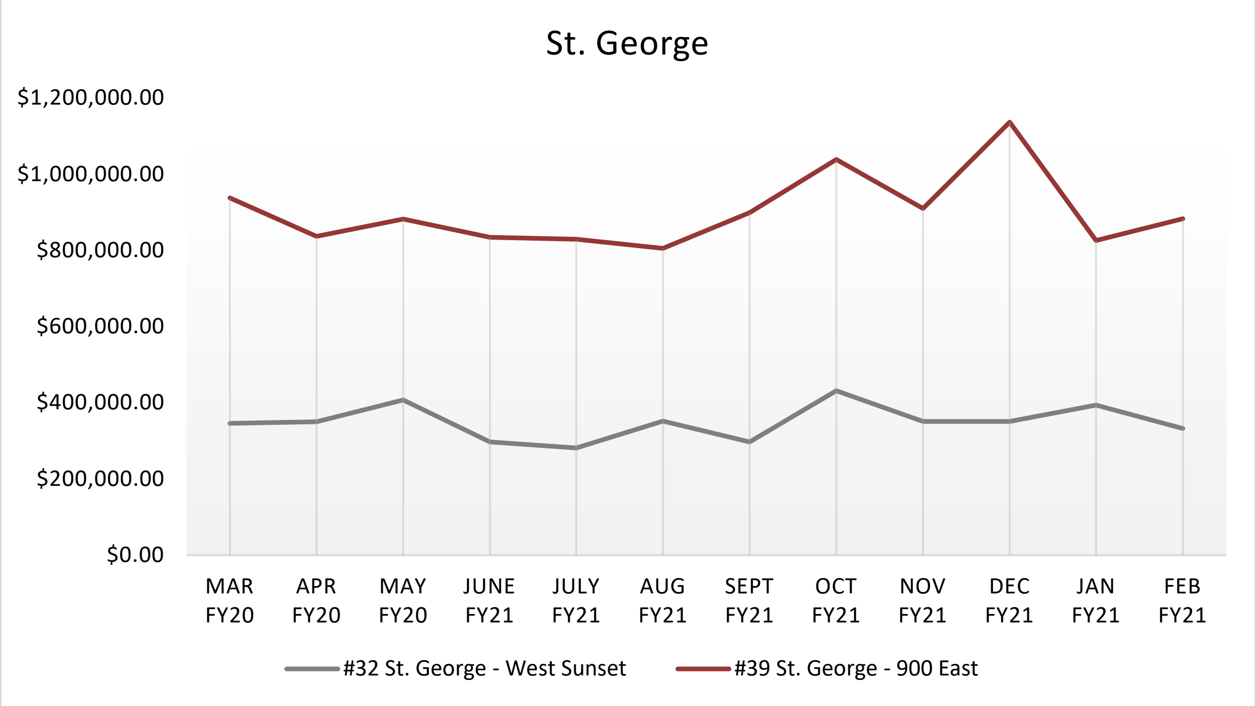
In comparison, stores in tourist communities show increased sales during their peak visitor periods. Moab has strong spring and fall visitation (with a dip this last year due to COVID-19), and this is reflected in the spikes in sales in the Moab store during the spring and fall months. Winters and warmer 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 still substantial number of visitors.



St. George stores generally followed statewide trends – however, higher sales than expected occurred during October, perhaps spurred by midterm exams ending for college students.



Appendix A: Sensitivity Analysis

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

Final Weights

Population 2021	Population 2031	Population Growth 2021-2031	Pop Density 2021	Bottles per Man Hour	Transactions per Capita
20%	10%	10%	10%	30%	20%

Alternate 1

Population 2021	Population 2031	Population Growth 2021-2031	Pop Density 2021	Bottles per Man Hour	Transactions per Capita
15%	15%	10%	10%	25%	25%

Alternate 2

Population 2021	Population 2031	Population Growth 2021-2031	Pop Density 2021	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	21	Harrisville	21	Harrisville	45	Springville
2	39	St. George	39	St. George	5	Provo
3	24	Ogden	24	Ogden	39	St. George
4	23	Roy	29	Holladay	17	Orem
5	45	Springville	41	Salt Lake City	21	Harrisville
6	29	Holladay	23	Roy	49	Saratoga Springs
7	48	Herriman	48	Herriman	48	Herriman
8	10	Tooele	15	Cottonwood Heights	6	Logan
9	41	Salt Lake City	45	Springville	23	Roy
10	17	Orem	37	Park City	26	Taylorsville
11	15	Cottonwood Heights	10	Tooele	10	Tooele
12	37	Park City	17	Orem	46	West Valley City
13	12	Salt Lake City	12	Salt Lake City	18	Cedar City
14	38	Park City	38	Park City	24	Ogden
15	18	Cedar City	46	West Valley City	15	Cottonwood Heights
16	46	West Valley City	19	Ogden	47	Syracuse
17	6	Logan	13	Salt Lake City	11	Magna
18	5	Provo	26	Taylorsville	19	Ogden
19	26	Taylorsville	43	Heber City	1	Salt Lake City
20	13	Salt Lake City	5	Provo	32	St. George
21	43	Heber City	18	Cedar City	42	Hurricane
22	19	Ogden	6	Logan	29	Holladay
23	42	Hurricane	42	Hurricane	41	Salt Lake City
24	11	Magna	1	Salt Lake City	43	Heber City

	Final Weight		Alternate 1		Alternate 2	
Rank	Store	City	Store	City	Store	City
25	49	Saratoga Springs	11	Magna	14	Salt Lake City
26	1	Salt Lake City	49	Saratoga Springs	13	Salt Lake City
27	47	Syracuse	47	Syracuse	35	Salt Lake City
28	14	Salt Lake City	14	Salt Lake City	28	Vernal
29	27	Moab	27	Moab	22	Brigham City
30	32	St. George	4	Salt Lake City	37	Park City
31	4	Salt Lake City	32	St. George	12	Salt Lake City
32	35	Salt Lake City	35	Salt Lake City	50	Farmington
33	28	Vernal	36	Park City	38	Park City
34	22	Brigham City	28	Vernal	4	Salt Lake City
35	36	Park City	22	Brigham City	7	Price
36	50	Farmington	7	Price	27	Moab
37	7	Price	50	Farmington	36	Park City
38	25	Millcreek	25	Millcreek	2	Salt Lake City
39	2	Salt Lake City	2	Salt Lake City	25	Millcreek
40	31	Draper	31	Draper	16	Sandy
41	16	Sandy	16	Sandy	31	Draper
42	3	West Valley City	3	West Valley City	3	West Valley City
43	9	Murray	9	Murray	9	Murray
44	8	Bountiful	8	Bountiful	30	Layton
45	30	Layton	30	Layton	8	Bountiful
46	44	Pleasant Grove	44	Pleasant Grove	44	Pleasant Grove
47	40	Riverton	40	Riverton	40	Riverton