

Andrea Thomas Brandley
Senior Education Analyst

The Economic Contribution of Southern Utah University

Southern Utah University strengthens Utah's Southwest Economic Region and statewide economies through high-quality education; institutional, student, and visitor spending; and broad societal benefits.

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Table of Contents

Analysis in Brief	1
Overview	2
Economic Analysis	2
Operational Expenditures	4
Capital and Construction Expenditures	6
Nonresident Student Spending	6
Visitor Spending	6
Societal Benefits	9
Workforce Quality and Development	9
Student Experience	11
Community Supports and Services	11
Research and Commercialization	12
Appendix A: Impact Analysis	13
Economic Impact	13
Appendix B: Methods	14
Model Construction	14
Input Data and Geographic Scope	14
Measuring Economic Effects	14
Construction and Capital	16
Nonresident Students	16
Nonresident Visitors	16
SUU Graduate Analysis	17
Utah Data Research Center Disclaimer	17

Figures

Figure 1: Utah’s Economic Regions	2
Figure 2: Regional vs. Statewide Contribution	3
Figure 3: Southern Utah University Statewide Economic Contribution, FY 2023	4
Figure 4: Southern Utah University Regional Economic Contribution, FY 2023	4
Figure 5: Visual Representation of Economic Contribution and Impact	5
Figure 6: Economic Flow of Direct, Indirect, and Induced Economic Effects	5
Figure 7: Southern Utah University In-Person Students by Origin, Fall 2023	6
Figure 8: Utah Shakespeare Festival Ticket Sales by Origin, FY 2023	8
Figure 9: Southern Utah University Revenue, FY 2023	8
Figure 10: Southern Utah University Expenses, FY 2023	8
Figure 11: Southern Utah University Degrees and Certificates Awarded by Award Level, 2022-23	10
Figure 12: Utah Median Earnings by Educational Attainment, 2023	10

Figure 13: Southern Utah University Revenue by Origin, FY 2023	13
Figure 14: Southern Utah University Out-of-state Revenue by Source, FY 2023	13

Tables

Table 1: Top 10 Employers in the Southwest Economic Region, FY 2023	2
Table 2: Southern Utah University Statewide Economic Contribution, FY 2023	4
Table 3: Southern Utah University Regional Economic Contribution, FY 2023	4
Table 4: Southern Utah University Operations Statewide Economic Contribution, FY 2023	4
Table 5: Southern Utah University Operations Regional Economic Contribution, FY 2023	4
Table 6: Southern Utah University Construction and Capital Statewide Economic Contribution, FY 2023	6
Table 7: Southern Utah University Construction and Capital Regional Economic Contribution, FY 2023	6
Table 8: Southern Utah University Students, Fall 2023	6
Table 9: Southern Utah University Out-of-State Student Spending Economic Impact, FY 2023	7
Table 10: Southern Utah University Out-of-Region Student Spending Economic Impact, FY 2023	7
Table 11: Southern Utah University Estimated Visitors, 2023	7
Table 12: Southern Utah University Out-of-State Visitor Spending Economic Impact, FY 2023	7
Table 13: Southern Utah University Out-of-Region Visitor Spending Economic Impact, FY 2023	7
Table 14: Utah Shakespeare Festival Regional Economic Impact, FY 2023	8
Table 15: Southern Utah University Degrees and Certificates Awarded by Area of Study, 2022-23	9
Table 16: Southern Utah University Graduates Employment Status	10
Table 17: Average Annual Wages of SUU Graduates	10
Table 18: Southern Utah University TRiO Student Support Services Outcomes, 2022-23	11
Table 19: Southern Utah University Statewide Economic Impact, FY 2023	13
Table 20: Southern Utah University Spending Pattern, FY 2023	15
Table 21: Southern Utah University Capital Spending Commodities, FY 2023	15
Table 22: Estimated Visitor Spending, FY 2023	17

The Economic Contribution of Southern Utah University

Analysis in Brief

Southern Utah University (SUU) generates substantial economic activity in Utah's Southwest Economic Region and statewide. The estimates presented here focus specifically on the economic contribution tied to SUU's direct spending through operations, capital and construction projects, and out-of-state student and visitor expenditures. SUU's educational mission creates additional long-term value by developing human capital and strengthening the workforce. While these broader benefits are addressed qualitatively, they are not captured in the economic contribution estimates.

Key Findings

- **Employment** – SUU directly employed 2,687 individuals in FY 2023, making it the largest employer in Iron County, the third largest employer in the Southwest Economic Region, and one of the top 50 employers statewide. Including indirect and induced jobs, SUU supports more than 5,000 jobs in the region, representing 3.1% of jobs regionwide.

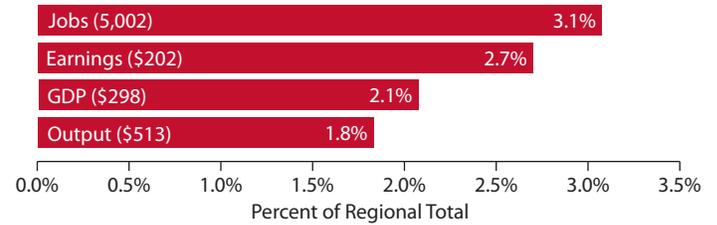
Top 10 Employers in the Southwest Economic Region, FY 2023

Rank	Company	Industry	Average Employment
1	Intermountain Health	Healthcare and Social Assistance	4,000-4,999
2	Washington School District	Public Education	3,000-3,999
3	Southern Utah University	Higher Education	2,000-2,999
4	Walmart	Retail Trade	2,000-2,999
5	Utah Tech University	Higher Education	2,000-2,999
6	Iron County School District	Public Education	1,000-1,999
7	The Home Depot	Retail Trade	1,000-1,999
8	St. George City	Local Government	1,000-1,999
9	State of Utah	State Government	1,000-1,999
10	Skywest Airlines	Transportation and Warehousing	500-999

Source: Utah Department of Workforce Services

SUU Regional Economic Contribution, FY 2023

Dollars in Millions



Note: Includes direct, indirect, and induced effects.

Source: Kem C. Gardner Policy Institute analysis of Southern Utah University data using IMPLAN 2022

- **Regional Economic Activity** – SUU supported a total of \$202 million in earnings, \$298 million in gross domestic product (GDP), and \$513 million in output (total sales) regionwide in FY 2023. This activity constitutes 2.7% of regional earnings, 2.1% of regional GDP, and 1.8% of total output in the Southwest Economic Region.
- **Visitor Spending** – SUU attracts many out-of-region visitors for events such as the Utah Shakespeare Festival, Utah Summer Games, athletic events, campus tours, and commencement. These visitors spent an estimated \$7 million in the Southwest Economic Region, further boosting local economic activity.
- **Education** – SUU enrolled over 15,000 students across more than 150 undergraduate programs and 30 graduate and certificate programs during the 2022-23 academic year. SUU awarded 4,679 degrees and certificates, equipping graduates for a wide range of careers in Utah's economy. More than 60% of SUU graduates work in-state five years after graduation.
- **Societal Benefits** – SUU benefits its students, employees, and community through workforce quality and development, student experience, community supports and services, and research and commercialization.

Overview

Founded in 1897, Southern Utah University (SUU) offers a wide range of undergraduate and graduate programs in business, education, health sciences, the arts, and more. Located in Cedar City, the approximate geographic center of Utah's Southwest Economic Region, the campus sits near several national parks earning it the nickname "the University of the Parks".

SUU contributes significantly to the Utah and Southwest Economic Region economies through operational spending, construction and capital spending, and spending by nonresident students and visitors. Additionally, SUU strengthens the local workforce with its community-focused approach and smaller class sizes ensuring personalized attention and experiential learning.

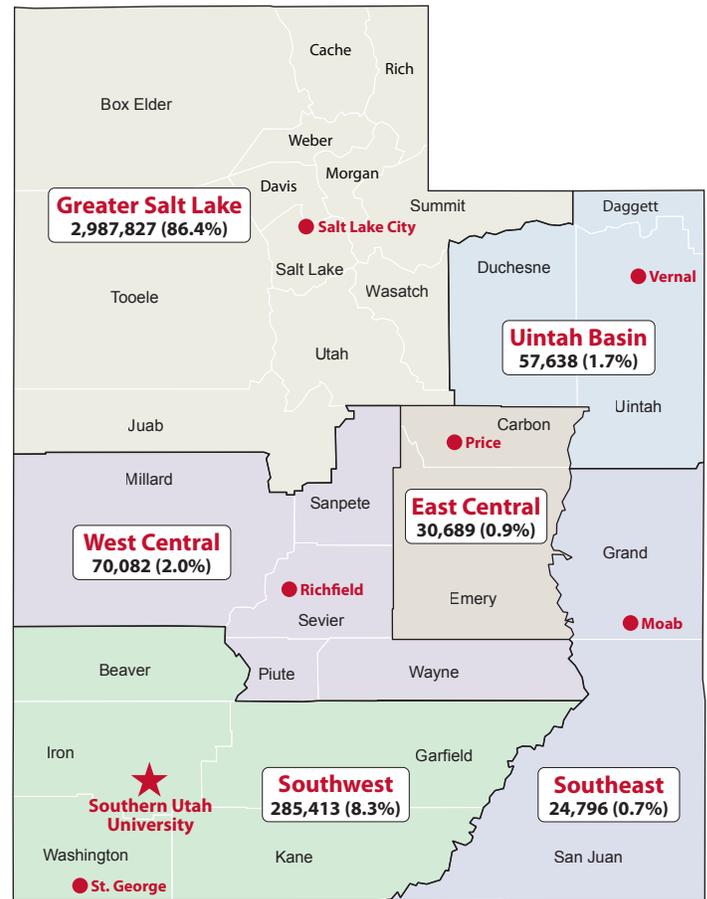
While SUU's educational mission generates long-term value by developing human capital, strengthening the workforce, and enriching the community, these broader benefits are not included in the economic contribution estimates. Instead, the estimates presented here focus solely on the short-term, measurable effects of university-related spending. This includes activity associated with both the broader SUU campus and the Utah Shakespeare Festival, an annual theater event that draws thousands of visitors to the region and contributes to the local economy through tourism and the arts.

Economic Analysis

SUU directly employed 2,687 workers in FY 2023, making it the largest employer in Iron County, the third largest employer in the Southwest Economic Region, and one of the top 50 employers statewide (Table 1). Four main spending types drive SUU's economic contribution: operations (including employment and associated compensation), capital and construction expenditures, nonresident student spending, and nonresident visitor spending. Based on these drivers, SUU's FY 2023 contributions were 4,492 jobs, \$189 million in earnings, \$260 million in GDP, and \$457 million in output in Utah (Table 2 and Figure 3).

SUU's regional contribution is more pronounced than its contribution to the state. In addition to out-of-state students and visitors, SUU draws many out-of-region students and visitors from within the state. This brings additional money to the local economy. SUU's regional economic contribution totals 5,002 jobs, \$202 million in earnings, \$298 million in GDP, and \$513 million in output representing 3.1% of jobs, 2.7% of earnings, 2.1% of GDP, and 1.8% of output regionwide (Table 3 and Figure 4).

Figure 1: Utah's Economic Regions
Population and Percent of Total, 2023



Note: Each region shows the city that serves as its economic center. Located in Cedar City, Utah, SUU sits approximately 50 miles north of St. George, the economic center of Utah's Southwest Economic Region.
Source: Kem C. Gardner Policy Institute

Table 1: Top 10 Employers in the Southwest Economic Region, FY 2023

Rank	Company	Industry	Average Employment
1	Intermountain Health	Healthcare and Social Assistance	4,000-4,999
2	Washington School District	Public Education	3,000-3,999
3	Southern Utah University	Higher Education	2,000-2,999
4	Walmart	Retail Trade	2,000-2,999
5	Utah Tech University	Higher Education	2,000-2,999
6	Iron County School District	Public Education	1,000-1,999
7	The Home Depot	Retail Trade	1,000-1,999
8	St. George City	Local Government	1,000-1,999
9	State of Utah	State Government	1,000-1,999
10	Skywest Airlines	Transportation and Warehousing	500-999

Source: Utah Department of Workforce Services

Statement of Methods

Many university economic impact and contribution studies do not clearly define the scope, direct expenditures, models, and multipliers at the *beginning* of the report.¹ The following statement provides this information. See Appendix B for additional details.

Geographic Scope

This report highlights SUU's economic contribution both regionally and statewide. SUU resides in the Southwest Economic Region, which includes Beaver, Garfield, Iron, Kane, and Washington counties. The regional contribution includes total spending on operations, construction and capital, and spending by nonresident students and visitors, including those from in-state but out-of-region. In contrast, the statewide contribution includes the same institutional spending and only accounts for out-of-state student and visitor spending. To maintain a conservative estimate aligned with best practices, the analysis excludes spending by resident students and visitors.

Although the statewide contribution captures broader ripple effects (indirect and induced impacts) that extend across the entire state, the total regional contribution is larger. This occurs because the regional analysis includes higher direct inputs from in-state, out-of-region students and visitors, which outweigh the broader ripple effects captured at the statewide level.

Units of Analysis

This study evaluates economic activity for four major categories distinguishing between the Utah Shakespeare Festival and the broader campus, referred to as "campus," when possible:

1. *Operations*: Ongoing expenditures for campus and the Utah Shakespeare Festival (shown separately).
2. *Capital and Construction*: Average annual construction and capital expenditures, not separated between campus and the Utah Shakespeare Festival due to overlap.
3. *Nonresident Student Spending*: Off-campus spending by out-of-state and out-of-region students in the regional economy, adjusted for wages earned in Utah.
4. *Nonresident Visitor Spending*: Off-campus spending by out-of-state and out-of-region visitors to the campus and Utah Shakespeare Festival (shown separately).

Year of Analysis

This study analyzes activity during SUU's Fiscal Year 2023 (July 1, 2022 – June 30, 2023). The report expresses amounts in 2023 dollars.

Model and Multipliers

This study uses the 2022 version of IMPLAN and its associated multipliers for the state of Utah and Southwest Economic Region, the most recent model available at the time of analysis.

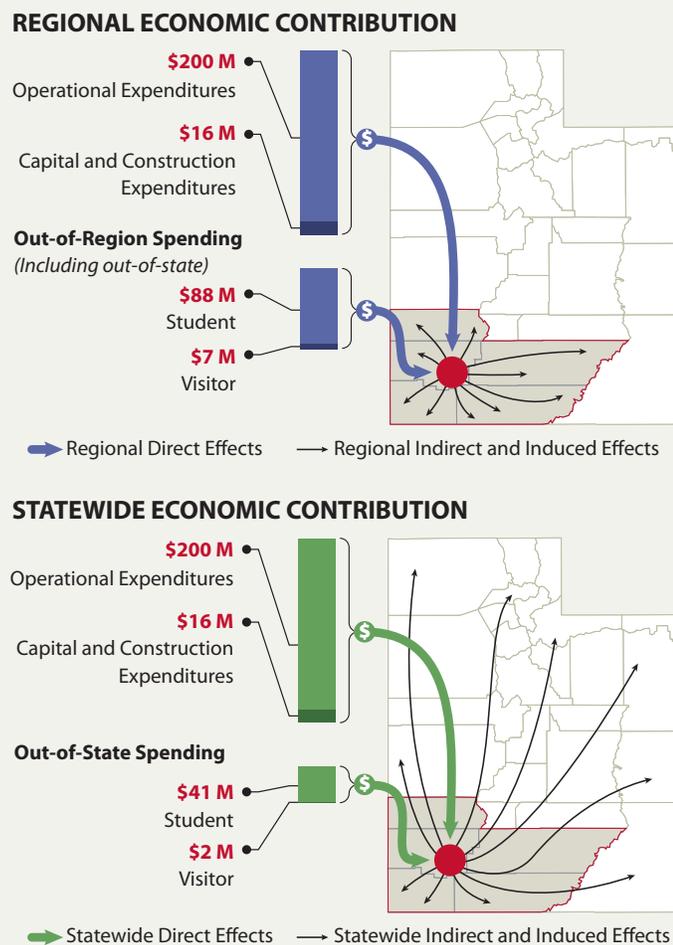
Direct Expenditures

SUU spent approximately \$200 million on operations in FY 2023 with an additional \$16 million on construction and capital (a 5-year average inflation-adjusted to 2023 dollars). The analysis estimates the contribution of this spending in-region and in-state and the subsequent effects. First-round expenditures also include \$40.7 million in off-campus spending by out-of-state students, \$87.5 million by out-of-region students, \$2.4 million by out-of-state visitors, and \$7.0 million by out-of-region visitors. Out-of-state students and visitors are included in out-of-region estimates.

Inflation Adjustment

Inputs are inflation-adjusted using the Consumer Price Index (CPI) for All Urban Consumers: All Items in U.S. City Average.

Figure 2: Regional vs. Statewide Contribution



Source: Kem C. Gardner Policy Institute analysis of Southern Utah University data

Table 2: Southern Utah University Statewide Economic Contribution, FY 2023

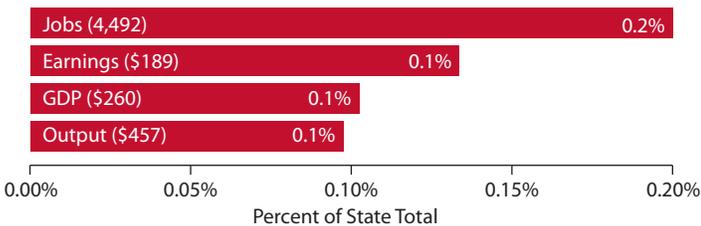
Dollars in Millions

	Jobs	Earnings	GDP	Output
Campus	4,265	\$180	\$249	\$438
Direct	2,527	\$113	\$113	\$238
Indirect & Induced	1,738	\$67	\$136	\$200
Utah Shakespeare Festival	227	\$8	\$11	\$19
Direct	160	\$6	\$6	\$10
Indirect & Induced	67	\$2	\$5	\$9
SUU Total	4,492	\$189	\$260	\$457
Direct	2,687	\$119	\$119	\$248
Indirect & Induced	1,805	\$70	\$141	\$209

Note: Jobs, earnings, and GDP associated with direct spending on construction and capital, student spending, and visitor spending are included in the indirect and induced effects. Source: Kem C. Gardner Policy Institute analysis of Southern Utah University data using IMPLAN 2022

Figure 3: Southern Utah University Statewide Economic Contribution, FY 2023

Dollars in Millions



Note: Includes direct, indirect, and induced effects. Source: Kem C. Gardner Policy Institute analysis of Southern Utah University data using IMPLAN 2022

Table 4: Southern Utah University Operations Statewide Economic Contribution, FY 2023

Dollars in Millions

	Jobs	Earnings	GDP	Output
Campus	3,674	\$160	\$203	\$362
Direct	2,527	\$113	\$113	\$190
Indirect & Induced	1,147	\$47	\$90	\$172
Utah Shakespeare Festival	209	\$8	\$10	\$17
Direct	160	\$6	\$6	\$9
Indirect & Induced	49	\$2	\$4	\$8
SUU Total	3,882	\$168	\$213	\$379
Direct	2,687	\$119	\$119	\$198
Indirect & Induced	1,195	\$49	\$94	\$181

Source: Kem C. Gardner Policy Institute analysis of Southern Utah University data using IMPLAN 2022

Operational Expenditures

Operational spending accounts for more than 80% of SUU's statewide economic contribution. SUU spent about \$200 million in FY 2023—approximately \$120 million on payroll and \$80 million on goods and services—to support a wide range of operational activities including instruction, research, student services, public service, athletics, arts and culture, operations and

Table 3: Southern Utah University Regional Economic Contribution, FY 2023

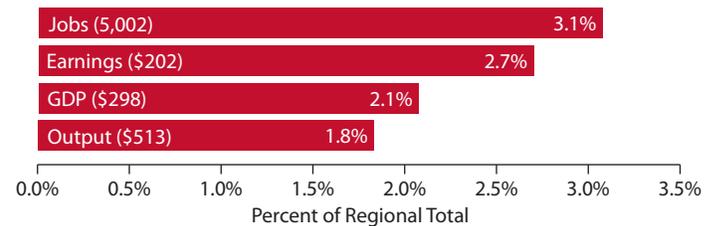
Dollars in Millions

	Jobs	Earnings	GDP	Output
Campus	4,747	\$192	\$285	\$491
Direct	2,527	\$113	\$113	\$283
Indirect & Induced	2,220	\$79	\$172	\$208
Utah Shakespeare Festival	255	\$9	\$13	\$22
Direct	160	\$6	\$6	\$12
Indirect & Induced	95	\$3	\$7	\$10
SUU Total	5,002	\$202	\$298	\$513
Direct	2,687	\$119	\$119	\$295
Indirect & Induced	2,315	\$83	\$179	\$218

Note: Jobs, earnings, and GDP associated with direct spending on construction and capital, student spending, and visitor spending are included in the indirect and induced effects. Source: Kem C. Gardner Policy Institute analysis of Southern Utah University data using IMPLAN 2022

Figure 4: Southern Utah University Regional Economic Contribution, FY 2023

Dollars in Millions



Note: Includes direct, indirect, and induced effects. Source: Kem C. Gardner Policy Institute analysis of Southern Utah University data using IMPLAN 2022

Table 5: Southern Utah University Operations Regional Economic Contribution, FY 2023

Dollars in Millions

	Jobs	Earnings	GDP	Output
Campus	3,629	\$157	\$197	\$351
Direct	2,527	\$113	\$113	\$189
Indirect & Induced	1,102	\$44	\$84	\$162
Utah Shakespeare Festival	207	\$8	\$10	\$17
Direct	160	\$6	\$6	\$9
Indirect & Induced	47	\$2	\$4	\$8
SUU Total	3,836	\$165	\$206	\$368
Direct	2,687	\$119	\$119	\$198
Indirect & Induced	1,149	\$46	\$87	\$170

Source: Kem C. Gardner Policy Institute analysis of Southern Utah University data using IMPLAN 2022

maintenance, academic and institutional support, and insurance. This spending supports 3,882 jobs, \$168 million in earnings, \$213 million in GDP, and \$379 million in output statewide (Table 4).

The regional contribution is slightly smaller than the statewide results (due to some economic effects occurring outside the region) totaling 3,836 jobs, \$165 million in earnings, \$206 million in GDP, and \$368 million in output (Table 5).

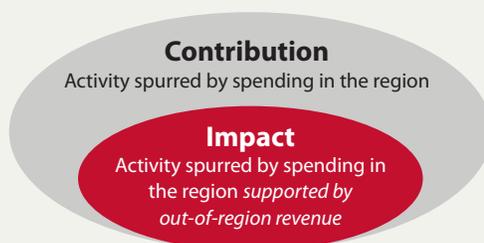
Economic Terms

University economic contribution and impact studies measure an institution's economic effect on a region.

Economic contribution: Contributions capture the extent of all university spending within the study region (regardless of the origin of funds) and show its reach and magnitude in the state and regional economies. This study highlights SUU's economic contributions from operations, construction, and capital spending. Including all spending enables reasonable comparisons with similar studies from other higher education institutions.

Economic impact: Impact studies measure changes in the size and structure of a region's economy when goods and services are purchased within the region with out-of-region or "new" money. This includes money generated outside the region or can also result from "import substitution," where residents would have to import goods and services if an industry did not exist locally. Impact analyses attempt to measure what portion of the contribution would not exist if the institution did not exist. Student and visitor spending included in the analysis are considered economic impacts, as they count only spending from students and visitors from outside the study region. Appendix A provides an economic impact analysis of SUU operations, capital, and construction spending in addition to nonresident student and visitor spending. Because student and visitor spending is only counted when it comes from out-of-state or out-of-region sources, the contribution and impact of this spending are equivalent.

Figure 5: Visual Representation of Economic Contribution and Impact

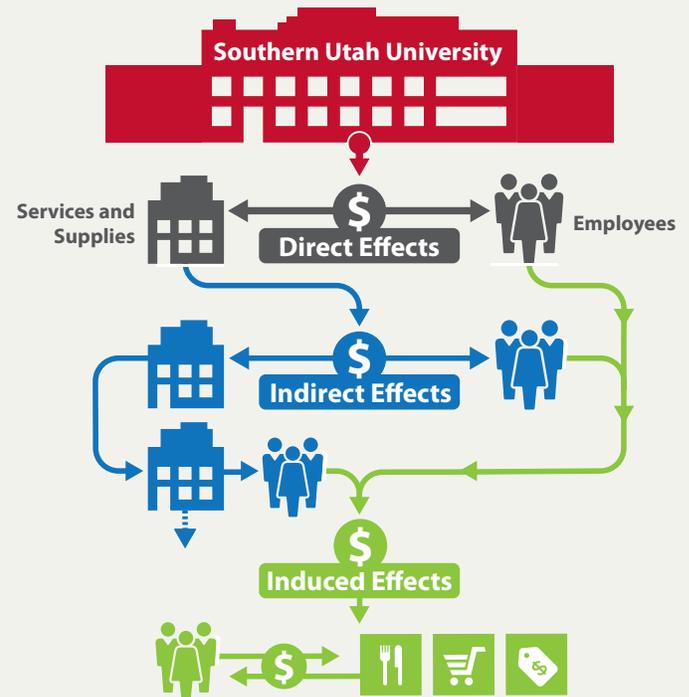


Source: Kem C. Gardner Policy Institute

Direct spending by the university generates economic effects that ripple through the economy, creating additional economic activity. This is measured through three main components:

- **Direct Effects:** Generated by spending on wages of SUU employees and direct purchases from vendors within the study region.
- **Indirect Effects:** Produced when SUU's local suppliers hire employees and make purchases from other local vendors.
- **Induced Effects:** Occur when employees of SUU and its suppliers spend their wages in the local economy.

Figure 6: Economic Flow of Direct, Indirect, and Induced Economic Effects



Source: Kem C. Gardner Policy Institute

This analysis measures economic effects in four ways: jobs, earnings, gross domestic product (GDP), and output. These measures capture different aspects of the economy and are not summable.

Jobs: The annual average number of full-time and part-time jobs (not workers) counted equally, including wage and salary and self-employed positions.

Earnings: The total of wage and salary disbursements, employer-paid benefits and payroll taxes, and self-employment income.

GDP: The market value of all goods and services produced in Utah or the Southwest Economic Region, capturing only the "value added" by labor and capital, avoiding double-counting intermediate sales. GDP provides the most common measure of total economic activity in a region and equals total output less the value of intermediate inputs purchased to produce that output.

Output: The gross value of all transactions in a region's economy, representing total industry sales and reflecting both final purchases and intermediate inputs resulting in the double-counting of some intermediate purchases.

Table 6: Southern Utah University Construction and Capital Statewide Economic Contribution, FY 2023

Dollars in Millions

	Jobs	Earnings	GDP	Output
SUU Total	136	\$7	\$10	\$19

Note: Campus and the Utah Shakespeare Festival share many buildings and capital purchases so this analysis combines construction and capital contributions. Includes direct, indirect, and induced effects stemming from \$16 million of direct expenditures with an estimated \$11 million occurring in-state.

Source: Kem C. Gardner Policy Institute analysis of Southern Utah University data using IMPLAN 2022

Capital and Construction Expenditures

SUU's construction spending also drives its economic contribution. Examples of major projects completed within the last five years include Bristlecone Hall, the Dixie Leavitt Business Building, and the George S. Eccles Sports Performance Center.

SUU's capital investment includes vehicles, art collections, machinery, aircraft, and other equipment. Because construction projects and capital purchases often extend over multiple years and vary annually, the analysis uses a 5-year average (FY 2019 to FY 2023) of annual expenditures. SUU's average annual spending on capital and construction totaled \$16 million with \$6 million spent on capital and \$10 million spent on construction.

This spending supported a statewide contribution of 136 jobs, \$7 million in earnings, \$10 million in GDP, and \$19 million in output (Table 6). Like operational spending, some of this contribution occurs outside the region resulting in a slightly lower regional contribution of 134 jobs, \$7 million in earnings, \$10 million in GDP, and \$18 million in output (Table 7).

Nonresident Student Spending

While SUU enrolls many local students, a significant portion of its student body comes from out-of-state or within Utah but out-of-region. These students bring new money to the region as students spend money off campus on purchases like housing, food from local grocery stores and restaurants, transportation, and entertainment and recreation at local venues. In the 2022-23 academic year, 3,617 out-of-state students attended SUU in-person, making up nearly 30% of the in-person student population (Table 8 and Figure 7). Each nonresident student spent an estimated \$12,000 off campus, excluding tuition, on-campus housing, and other on-campus expenses accounted for in SUU's operational spending. After accounting for estimated wages earned in state, their net off-campus spending amounted to about \$40 million in FY 2023. This spending supported 444 jobs, \$13 million in earnings, \$36 million in GDP, and \$56 million in output statewide (Table 9).

While SUU serves many out-of-state students, most attend from within the state but outside the Southwest Economic Region. Excluding online students, more than 10,000 students (81.6%) attend SUU from outside the region, collectively

Table 7: Southern Utah University Construction and Capital Regional Economic Contribution, FY 2023

Dollars in Millions

	Jobs	Earnings	GDP	Output
SUU Total	134	\$7	\$10	\$18

Note: Campus and the Utah Shakespeare Festival share many buildings and capital purchases so this analysis combines construction and capital contributions. Includes direct, indirect, and induced effects stemming from \$16 million of direct expenditures with an estimated \$11 million occurring in-region.

Source: Kem C. Gardner Policy Institute analysis of Southern Utah University data using IMPLAN 2022

Table 8: Southern Utah University Students, Fall 2023

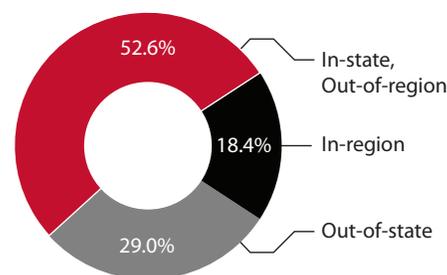
	Student Count	Share of In-Person Students
In Person	12,455	100.0%
In-state students	8,838	71.0%
Out-of-state students	3,617	29.0%
In-region students	2,294	18.4%
Out-of-region students	10,161	81.6%
Online Students	2,566	NA
Total Students	15,021	NA

Note: Out-of-region students include both out-of-state students and in-state students from outside the Southwest Economic Region.

Source: Southern Utah University

Figure 7: Southern Utah University In-Person Students by Origin, Fall 2023

Source: Southern Utah University



spending an estimated \$88 million in the 2022-23 academic year. This results in a regional contribution more than twice as large as the state contribution totaling 946 jobs, \$28 million in earnings, \$76 million in GDP, and \$118 million in output (Table 10).

Visitor Spending

Out-of-state and out-of-region visitor spending also contribute to SUU's economic impact. This analysis includes estimated spending from visitors attending key events including the Utah Shakespeare Festival, Utah Summer Games, athletic events, campus tours, and commencement (Table 11).

- **Utah Shakespeare Festival:** The Utah Shakespeare Festival attracted approximately 40,000 patrons in 2023 along with 2,700 students and 440 chaperones for the annual Shakespeare Competition. Based on ticket sales data, more than 11,000 visitors came from out-of-state and nearly 30,000 from out-of-region.
- **Utah Summer Games:** SUU's Utah Summer Games featured 45 sports and activities, attracting 35,000 visitors. In 2023, nearly 10,000 unique participants registered for the

Table 9: Southern Utah University Out-of-State Student Spending Economic Impact, FY 2023

Dollars in Millions

	Jobs	Earnings	GDP	Output
SUU Total	444	\$13	\$36	\$56

Note: Includes direct, indirect, and induced effects stemming from approximately \$40 million of direct student spending with an estimated \$37 million occurring in-state. The model included estimated spending by out-of-state students only making the student spending portion an economic impact.

Source: Kem C. Gardner Policy Institute analysis of Southern Utah University data using IMPLAN 2022

Table 10: Southern Utah University Out-of-Region Student Spending Economic Impact, FY 2023

Dollars in Millions

	Jobs	Earnings	GDP	Output
SUU Total	946	\$28	\$76	\$118

Note: Includes direct, indirect, and induced effects stemming from approximately \$88 million of direct student spending with an estimated \$80 million occurring in-region. The model included estimated spending by out-of-region students only making the student spending portion an economic impact. Because out-of-region visitors include out-of-state visitors along with visitors from other Utah regions, the regional impact is larger than the statewide impact.

Source: Kem C. Gardner Policy Institute analysis of Southern Utah University data using IMPLAN 2022

Table 11: Southern Utah University Estimated Visitors, 2023

Event	Out-of-State			Out-of-Region*		
	Estimated Visitors	Estimated Days in Region	Total Estimated Visitor Days	Estimated Visitors	Estimated Days in Region	Total Estimated Visitor Days
Utah Shakespeare Festival	11,060	2.5	27,651	29,736	2.5	74,340
Utah Summer Games	2,741	2	5,482	17,450	2	34,899
Athletics	9,635	1	9,635	20,085	1	20,085
Campus Tours	1,350	1	1,350	2,739	1	2,739
Commencement	1,023	1	1,023	2,875	1	2,875

*Out-of-region visitors include both out-of-state visitors and in-state visitors from outside the Southwest Economic Region.

Source: Kem C. Gardner Policy Institute analysis of Southern Utah University data

Games, totaling over 12,000 entries including multi-sport participants. About 2,700 out-of-state visitors and over 17,000 out-of-region visitors attended the Games.

- **Athletic Events:** SUU issued more than 80,000 tickets for athletic events in the 2022-23 academic year, drawing 10,000 out-of-state and 20,000 out-of-region visitors.
- **Campus Tours:** SUU provided over 1,000 campus tours in the 2022-23 academic year. These tours drew 450 out-of-state students and nearly 1,000 out-of-region students.

SUU estimates an average of two visitors per student, resulting in 1,350 out-of-state visitors and about 2,700 out-of-region visitors.

Table 12: Southern Utah University Out-of-State Visitor Spending Economic Impact, FY 2023

Dollars in Millions

	Jobs	Earnings	GDP	Output
Campus	11	\$0.4	\$1	\$1
Utah Shakespeare Festival	18	\$0.6	\$1	\$2
SUU Total	29	\$1	\$2	\$3

Note: Includes direct, indirect, and induced effects stemming from approximately \$2 million of direct visitor spending with an estimated \$1.7 million occurring in-state. The model included estimated spending by out-of-state visitors only making the student spending portion an economic impact.

Source: Kem C. Gardner Policy Institute analysis of Southern Utah University data using IMPLAN 2022

Table 13: Southern Utah University Out-of-Region Visitor Spending Economic Impact, FY 2023

Dollars in Millions

	Jobs	Earnings	GDP	Output
Campus	39	\$1	\$2	\$4
Utah Shakespeare Festival	48	\$2	\$3	\$5
SUU Total	87	\$3	\$5	\$9

Note: Includes direct, indirect, and induced effects stemming from approximately \$7 million of direct visitor spending with an estimated \$6 million occurring in-region. The model included estimated spending by out-of-region visitors only making the student spending portion an economic impact. Because out-of-region visitors include out-of-state visitors along with visitors from other Utah regions, the regional impact is larger than the statewide impact.

Source: Kem C. Gardner Policy Institute analysis of Southern Utah University data using IMPLAN 2022

- **Commencement:** Nearly 1,800 SUU graduates attended the 2023 in-person commencement. Based on student origin data and estimating an average of two guests per graduate, SUU's commencement brought about 1,000 out-of-state visitors and nearly 3,000 out-of-region visitors.

These visitors support the local economy through spending on lodging, food, and recreational activities. In FY 2023, out-of-state visitors spent an estimated \$2 million resulting in an economic contribution of 29 jobs, \$1 million in earnings, \$2 million in GDP, and \$3 million in output (Table 12).

SUU's regional contribution is even greater due to the number of Utahns who travel from other parts of the state to attend SUU events. Out-of-region visitors spent an estimated \$7 million within the Southwest Economic Region in FY 2023, supporting 87 jobs, \$3 million in earnings, \$5 million in GDP, and \$9 million in output (Table 13).

These visitor contribution estimates likely understate economic effects, as some may come from out-of-state or out-of-region to attend other SUU events or visit a student or staff member for reasons other than those included in the analysis.

The Regional Economic Impact of the Utah Shakespeare Festival

Each summer and fall, SUU hosts the Utah Shakespeare Festival, an annual theater event showcasing Shakespeare's plays alongside works by other playwrights. The Festival provides high-quality theatrical productions to local residents and visitors whose spending supports the local economy. The Festival also provides educational programs and workshops for SUU students and community members and collaborates closely with the broader campus on academic and community engagement.

Ticket sales serve as the Utah Shakespeare Festival's largest revenue source with nearly 100,000 tickets sold in the 2023 season. The Festival sold more than two-thirds of tickets to out-of-region patrons (Figure 8). The Festival's total sales and services resulted in \$3.8 million in out-of-region revenue. The state also appropriates nearly \$2.0 million to the Utah Shakespeare Festival, bringing new money to the Southwest Economic Region. Additionally, the Festival also received more than \$1 million in donations, with over three-quarters coming from out-of-region donors. As a result, 81.0% of the Festival's revenue originates from out-of-region sources.

The economic impact of the Utah Shakespeare Festival measures the activity generated by in-region spending supported by out-of-region revenue (ticket sales revenue from out-of-region patrons, out-of-region grants and contracts, state appropriations, out-of-region donations, and spending by out-of-region visitors). The Utah Shakespeare Festival's FY

Figure 8: Utah Shakespeare Festival Ticket Sales by Origin, FY 2023

Source: Kem C. Gardner Policy Institute analysis of Southern Utah University data

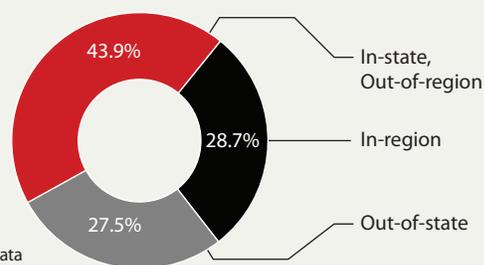


Table 14: Utah Shakespeare Festival Regional Economic Impact, FY 2023

Dollars in Millions

	Jobs	Earnings	GDP	Output
Operations	178	\$7	\$8	\$14
Direct	136	\$5	\$5	\$8
Indirect & Induced	42	\$2	\$3	\$6
Visitor Spending	48	2	3	5
Total	226	\$8	\$11	\$19
Direct	136	\$5	\$5	\$11
Indirect & Induced	90	\$3	\$6	\$8

Note: The visitor spending contribution includes direct, indirect, and induced effects stemming from approximately \$3 million of direct visitor spending.

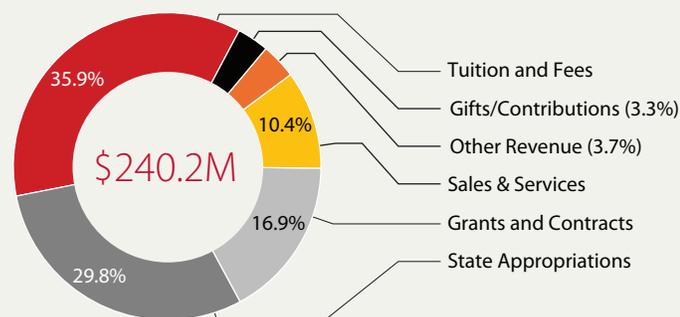
Source: Kem C. Gardner Policy Institute analysis of Southern Utah University data using IMPLAN 2022

2023 regional economic impact totals 226 jobs, \$8 million in earnings, \$11 million in GDP, and \$19 million in output. This estimate excludes the Utah Shakespeare Festival's portion of SUU capital and construction spending (Table 14).

SUU Funding Overview

SUU's FY 2023 revenue totaled \$240.2 million, which comes from a diverse array of sources. Tuition and fees and state appropriations constitute the university's two largest revenue sources, comprising more than half of total revenue. Other revenue sources include grants and contracts, sales and services, gifts and contributions, and investment income (Figure 9).

Figure 9: Southern Utah University Revenue, FY 2023

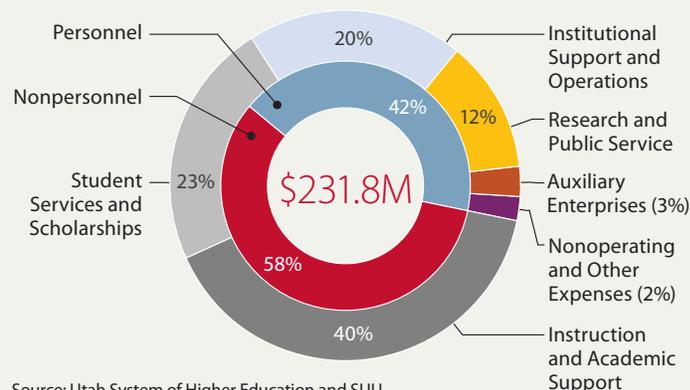


Note: Grants and contracts include federal, state, and other grants for research and other purposes.

Source: Utah System of Higher Education

SUU's FY 2023 expenditures totaled \$231.8 million with nearly two-thirds allocated to instruction, academic support, and student services and scholarships (Figure 10). More than half of all expenses support salaries and benefits of SUU employees.

Figure 10: Southern Utah University Expenses, FY 2023



Source: Utah System of Higher Education and SUU FY 2023 Annual Financial Report

Societal Benefits

Southern Utah University offers societal benefits that extend beyond quantifiable economic contributions. While harder to measure, these contributions are central to SUU's mission and its value to Utah and the Southwest Economic Region. While not comprehensive of all SUU programs and services, the programs described here highlight some of the societal benefits SUU provides around workforce quality and development, student experiences, community supports and services, and research and commercialization.

Workforce Quality and Development

Economies grow by transforming lower-value inputs into higher-value outputs through factor accumulation (capital and labor) and productivity (the efficiency of turning inputs into outputs). Factor accumulation and productivity are known as the “proximate causes of growth”.

Labor, or human capital, plays a critical role in this process. While population growth determines labor *quantity*, education shapes labor *quality*. SUU enhances workforce quality by providing experiential education that prepares students for the job market. This well-educated workforce boosts economic output.

SUU contributes to Utah’s workforce by educating over 15,000 students across more than 150 undergraduate programs and 30 graduate and certificate programs. During the 2022-23 academic year, SUU awarded 4,679 degrees and certificates, preparing students for various careers in Utah’s economy (Figure 11 and Table 15).

SUU’s Mission, Vision, and Strategic Priorities

Mission: Southern Utah University is a dynamic teaching and learning community that engages students in experiential education leading to personal growth, civic responsibility, and professional excellence.

Vision: SUU will be an inclusive and innovative institution of higher education that strengthens students’ connections to each other, the campus, their discipline, career of choice, community, and the world. SUU will deliver quality and affordable academic learning and an outstanding student experience.

Strategic Priorities:

- Enhance student success
- Enrich the student academic experience
- Cultivate a culture of caring
- Increase access and affordability
- Expand alumni and community engagement

Table 15: Southern Utah University Degrees and Certificates Awarded by Area of Study, 2022-23

Area of Study	Degrees Awarded
Liberal Arts and Sciences, General Studies, and Humanities	2,472
Business, Management, Marketing, and Related Support Services	519
Education	288
Visual and Performing Arts	166
Health Professions and Related Programs	116
Communication, Journalism, and Related Programs	113
Family and Consumer Sciences/Human Sciences	101
Biological and Biomedical Sciences	94
Parks, Recreation, Leisure, Fitness, and Kinesiology	93
Psychology	89
Multi/Interdisciplinary Studies	88
Transportation and Materials Moving	81
Social Sciences	70
Public Administration and Social Service Professions	61
Homeland Security, Law Enforcement, Firefighting and Related Protective Services	59
Engineering	45
Computer and Information Sciences and Support Services	43
History	34
Engineering/Engineering-Related Technologies/Technicians	29
Agricultural/Animal/Plant/Veterinary Science and Related Fields	28
Physical Sciences	25
English Language and Literature/Letters	20
Mathematics and Statistics	17
Mechanic and Repair Technologies/Technicians	13
Philosophy and Religious Studies	8
Foreign Languages, Literatures, and Linguistics	5
Legal Professions and Studies	2
Total	4,679

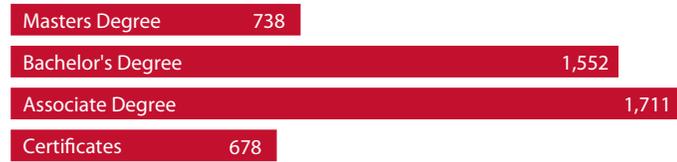
Source: Utah System of Higher Education

SUU also offers industry-driven programs through their Community and Workforce Development program and their dual-enrollment program with Southwest Technical College to better meet local workforce needs.

SUU Graduates

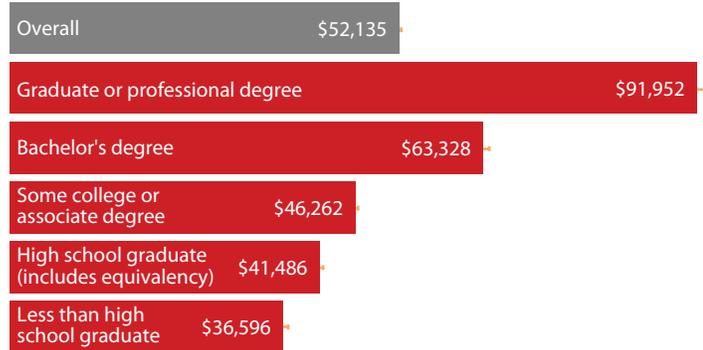
Most SUU graduates live and work within Utah, further contributing to the economy as they enter the workforce. Nearly 70% of graduates work in-state one year after graduation and 61.7% still work in-state five years after graduation (based on 2016 and 2020 graduating cohorts) (Table 16). These alumni contribute to a skilled workforce and support further economic growth through spending on goods and services and increased tax contributions. On average, Utah residents with higher educational attainment earn higher wages resulting in increased consumption and larger tax contributions than those with lower educational attainment (Figure 12).

Figure 11: Southern Utah University Degrees and Certificates Awarded by Award Level, 2022-23



Source: Utah System of Higher Education

Figure 12: Utah Median Earnings by Educational Attainment, 2023



Note: Data for the population age 25+. Earnings include wages or salary from a job, or income from being self-employed. These survey-based estimates remain subject to sample variation. Each estimate shows its 90% confidence interval. This interval represents a range of population values that are plausible in light of information in the sample, with a 90% degree of confidence. Reported values for groups with non-overlapping error bars are statistically different to the same degree of confidence.

Source: U.S. Census Bureau, 2023 5-Year American Community Survey estimates

Data for SUU graduates also show an association between higher educational attainment and higher wages. Wages for SUU graduates are significantly higher five years after graduation than they are one year after graduation (consistent with the increase in wages over a person's lifespan). Wages for graduates one year after graduation are higher for the 2020 cohort than for the 2016 cohort for all award levels signaling wages increasing faster than inflation (Table 17).

Community and Workforce Development

SUU's Community and Workforce Development (CWD) program offers workplace ready pathways through industry-aligned microcredentials and stackable certificates for adult

Table 17: Average Annual Wages of Southern Utah University Graduates

In FY 2023 Dollars

Award Level	2016 Cohort		2020 Cohort
	One Year Post-Graduation	Five Years Post-Graduation	One Year Post-Graduation
Associate Degree	\$18,477	\$35,277	\$22,768
Bachelor's Degree	\$37,805	\$59,759	\$44,729
Graduate Degree	\$69,808	\$94,552	\$81,165

Note: These data capture the wages of individuals with sustained, full-year employment (earning at least the equivalent of full-time minimum wage in each quarter) in firms that report to the unemployment insurance program, which includes most Utah firms. Data do not include self-employed individuals, federal employees, or military personnel. The 5-year post-graduation wages for the 2016 cohort exclude students who reenrolled.

Source: Kem C. Gardner Policy Institute analysis of Utah Data Research Center data

learners to upskill or transition into degree programs. Launched in 2017, CWD partners with more than a dozen industry leaders in fields like cybersecurity, advanced manufacturing, animal services, tourism and hospitality, and health care offering 60 courses with stackable credits toward SUU degrees. The program enrolled more than 1,000 people and issued 555 stackable credits and 359 certificates in the 2022-23 academic year. SUU's efforts contribute to economic growth and workforce readiness that align with regional needs in southwest Utah, positioning it as a leader in microcredential development and adult learning.²

The *Journal of Industry and Higher Education* featured SUU's workplace ready pathways model in its August 2024 edition.³ Researchers from SUU and Utah Tech University collaborated to examine the model's effectiveness, which informed the creation of the FutureReady Utah initiative, a regional workforce and economic development program. Supported by the Economic Development Administration, the initiative now engages SUU, Utah Tech University, and Snow College to serve eleven counties in Southwest Utah by developing microcredentials linked to living-wage jobs and degree programs.

SUU and Southwest Technical College Dual Enrollment Program

SUU and Southwest Technical College partner through the Dual Enrollment Program, which allows Southwest Tech students to simultaneously enroll at SUU and vice versa. This enables Southwest Tech students to earn university credits at no extra

Table 16: Southern Utah University Graduates Employment Status

Full-Year Employment at or Above Minimum Wage

	2016 Cohort					2020 Cohort		
	Total Graduates	Employed in Utah One Year After Graduation		Employed in Utah Five Years after Graduation		Total Graduates	Employed in Utah One Year After Graduation	
		Number	Share	Number	Share		Number	Share
Resident	1,382	1,045	75.6%	958	69.3%	2,138	1,661	77.7%
Nonresident	311	109	35.0%	87	28.0%	688	247	35.9%
Total	1,693	1,154	68.2%	1,045	61.7%	2,826	1,908	67.5%

Note: Employment reflects individuals with earnings of at least \$3,770 in each quarter of the fiscal year, equivalent to full-time minimum wage. These data capture employment in firms that report to the unemployment insurance program, which includes the majority of Utah firms. Data does not include individuals who are self-employed, federal employees, or military personnel. Nonresident defined as a person ever being listed as an out-of-state student prior to graduation.

Source: Kem C. Gardner Policy Institute analysis of Utah Data Research Center data

cost for specific course equivalencies. Additionally, SUU students can enroll in certificate programs at Southwest Tech to earn SUU credit while benefiting from the technical college's lower tuition rates. Nearly 200 students earned 700 credits through the program in the 2022-23 academic year, valued at \$266,620.⁴

Student Experience

SUU prioritizes student experience as a key to academic success and personal development. These initiatives and programs play an important role in promoting student engagement and empowering students to persist through graduation.

TRiO Student Support Services (SSS)

TRiO Student Support Services (SSS) offers comprehensive academic support to 200 students per year. The program serves first-generation college students, those from low-income backgrounds, and students with documented disabilities. TRiO SSS is federally funded through the Department of Education and offers free mentoring, tutoring, academic advising, and grant aid, ensuring participants receive personalized guidance and resources to support their academic success. In the 2022-23 academic year, SUU exceeded all Department of Education performance objectives, demonstrating the program's effectiveness in fostering student achievement (Table 18).⁵

T-Bird Promise Scholarship

Designed to eliminate financial barriers for underserved student populations, the T-Bird Promise Scholarship at SUU promotes access to equitable education. This scholarship seeks to ensure that all students, regardless of financial background, can pursue higher education and achieve their academic and career goals. SUU awarded 217 T-Bird Promise Scholarships in the 2022-23 academic year, providing \$473,500 in savings, an average of \$2,182 per student. The T-Bird Promise Scholarship opens doors for students from diverse backgrounds and cultivates an inclusive and supportive education environment at SUU.⁶

Aviation

SUU boasts the highest altitude university flight school in the nation, providing unique opportunities for over 700 aviation students. SUU features one of the most advanced aviation maintenance programs globally, offering students hands-on experience with the latest technologies. Their airplane training fleet is primarily composed of the Cirrus SR20, renowned as one of the safest single-engine aircraft in the world. SUU also operates the world's largest university-owned helicopter fleet, providing extensive training opportunities.⁷

Visual and Performing Arts

The Utah Shakespeare Festival provides SUU students with hands-on experience and education in professional theater. The Southern Utah Museum of Art is also located at SUU, exhibiting art from local and emerging artists, renowned artists, and student and faculty artwork from the Department of Art and Design.⁸

Table 18: Southern Utah University TRiO Student Support Services Outcomes, 2022-23

Objective Description	Objective	Outcome
Share of students graduating within six years	40%	56%
Share of students retained from one year to the next	75%	92%
Share of students maintaining a 2.0 GPA or Higher	80%	97%

Source: SUU TRiO Student Support Services

Community Support and Services

SUU fosters community engagement and provides support services that enrich both the campus and the surrounding region. The Utah Shakespeare Festival and Utah Summer Games exemplify SUU's community impact. SUU's Community Engagement Center, weekly lecture series, and Leavitt Center for Politics & Public Service further support the university's commitment to community engagement and outreach.

Utah Summer Games

SUU annually hosts the Larry H. Miller Utah Summer Games, a multi-sport event modeled after the Olympic Games. The Summer Games feature 45 sports and activities, offering athletes of all ages and skill levels the opportunity to participate. The event generally holds an opening ceremony with live music and fireworks creating a community atmosphere. The games have become a significant event in the region, attracting nearly 10,000 participants and thousands more spectators each year.⁹

Community Engagement Center (CEC)

SUU's Community Engagement Center (CEC) connects students, faculty, and staff to meaningful volunteer programs.

The center offers ten to twelve service events each week from September through April, including:

- Weekly sports club for middle school students
- Weekend service trips to support local state and national parks
- Tutoring and activities for K-12 students at the local Paiute Tribal Education center
- Weekly story time at the public library
- After school dance program at a local elementary school
- Swim and water safety classes for Head Start preschoolers

The CEC also hosts a county-wide holiday assistance program (which serves about 1,500 children from about 500 families each December), a large family literacy event (attended by a few hundred families each March), as well as one-time programming and volunteer support for partners who reach out with specific needs. During the 2022-23 academic year, the CEC facilitated 7,697 volunteer engagements providing 57,828 hours of community service.¹⁰

A key feature of the CEC is the Community Engaged Scholar Program, offering students a pathway to integrate service and engagement into their college experience. Students in the program engage in volunteer work, community-engaged coursework, research, and projects tailored to their interests and community needs. This approach helps students contribute to the community while gaining skills that enhance their academic and personal growth.

Eccles A.P.E.X.

Eccles A.P.E.X. is SUU's premier weekly lecture series, bringing together presenters from around the globe. The series covers diverse topics and attracts students, faculty, staff, and community members. Guest speakers engage with attendees through interactive sessions and networking. All A.P.E.X. events are free and open to the public. The series tagline, "Ask. Ponder. Educate. [X]," highlights the ever-changing and broad range of topics covered in the series, with [X] symbolizing the variable element of the lectures. This series showcases a broad spectrum of thoughts, ideas, disciplines, backgrounds, and intellectual and cultural themes.¹¹

Leavitt Center for Politics & Public Service

The Leavitt Center for Politics & Public Service at SUU is a student-run organization dedicated to fostering leadership, humanitarian service, and public policy research. The center hosts a variety of events focused on civic engagement, political education, and public service and provides practical opportunities through its internship programs. Students from any major can secure internships year-round in local, state, and federal offices, including placements in the Utah Legislature and Washington, D.C. The center placed 28 student interns in the 2022-23 academic year.¹²

Research and Commercialization

As a regional institution, SUU primarily focuses on high-quality teaching and experiential learning. However, the university also engages in modest research and commercialization efforts that support its mission and contribute to local economic development. Through its Business Center, and Sponsored Programs, Agreements, Research, and Contracts (SPARC) Office, SUU advances research activity, supports small business growth, and nurtures entrepreneurship.

SUU Business Center

SUU's Business Center supports small business development and entrepreneurship within the university and community. The center hosts programs that support entrepreneurial ventures by providing resources, mentorship, funding, and access to specialized facilities to aspiring business owners. The Business Center houses many programs and centers:

- The Small Business Development Center (SBDC) supports small businesses with counseling, training, and resources, assisting entrepreneurs from startup to expansion. In 2023, the SBDC provided 628 counseling hours, served 211 clients, and supported the creation of 18 new businesses.¹³
- APEX Accelerator connects local businesses with government contracting opportunities, helping them expand and secure contracts. Eighty awards totaling \$28.2 million dollars were secured in FY 2023.¹⁴
- SUU Startups provides counseling for student and community entrepreneurs at both the SUU Center for Entrepreneurship and the Cedar City Business & Innovation Center at Southwest Technical College. From October 1, 2023 - March 31, 2024, 112 people or businesses sought assistance from SUU Startups through 364 counseling sessions, resulting in 43 startups with 24 new jobs. These startups received \$121,950 in funding and earned \$410,715 in revenue for the reporting period. Multiple events, competitions, trainings, and speaker series programs were held during this period.¹⁵

Sponsored Programs, Agreements, Research, and Contracts (SPARC) Office

The Sponsored Programs, Agreements, Research, and Contracts (SPARC) Office at SUU promotes externally funded research, training, student support, and other pilot projects. SPARC serves as a hub for information support throughout a research grant's lifecycle. This includes identifying funding sources, developing proposals and budgets, completing applications, ensuring regulatory compliance, negotiating awards and contracts, and managing project closeouts. In FY 2023, SUU received 102 awards totaling \$17.3 million.¹⁶

Appendix A: Impact Analysis

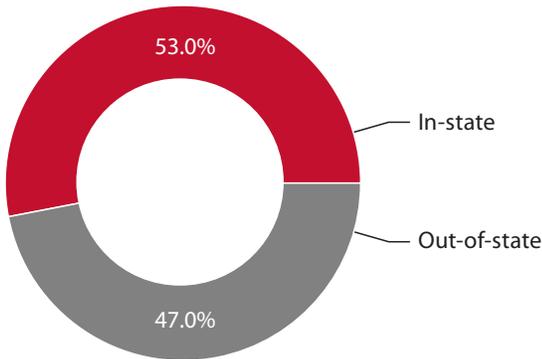
Economic Impact

Many university “economic impact studies” capture activity beyond a true economic impact, incorrectly labelling economic contributions as “impacts”.¹⁷ Because of this, the results of the economic contribution analysis presented in the main body of the report is likely best suited for comparison with other studies. The economic impact analysis results given here in appendix A illustrate the net-new economic activity attributable to SUU.

The economic impact refers to the portion of the economic contribution financed by out-of-region revenue. In other words, economic impacts occur when “new money” from outside the regional economy is spent within the region. Thus, SUU’s economic impact represents the piece of the Utah economy that would not exist without SUU. It assumes that without SUU, the revenue it currently brings in from outside Utah would not be a part of the state’s economy.

Approximately 47.0% of SUU’s revenue represents new money in Utah’s economy (Figure 13). More than 90% of this external revenue came from tuition and fees from out-of-state students,

Figure 13: Southern Utah University Revenue by Origin, FY 2023



Source: Kem C. Gardner Policy Institute analysis of Southern Utah University data

federal grants, and student aid for in-state students. Investment income, athletics revenue (including NCAA distributions and athletic game guarantees from out-of-state schools), gifts and contributions, Utah Shakespeare Festival sales, and other revenue make up the remainder of SUU’s out-of-state revenue (Figure 14).

SUU’s total economic impact includes its out-of-region-financed operations, construction and capital spending, and nonresident students and visitor spending. This economic impact totals 2,334 jobs, \$95 million in earnings, \$141 million in GDP, and \$244 million in output (Table 19).

Higher education also generates fiscal impacts not captured in this report ranging from narrower estimates tied to university-related tax revenues and public service costs, to broader long-term effects associated with a more highly educated population. These broader fiscal impacts will be explored in future research.

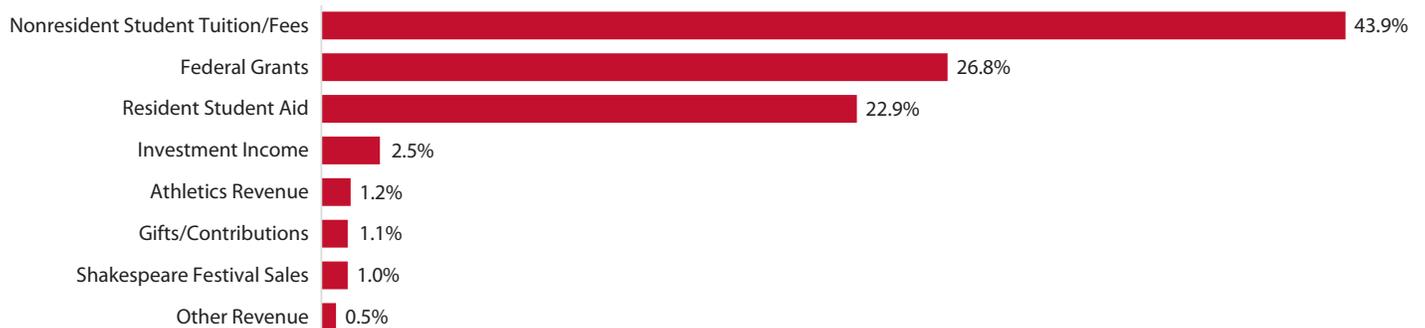
Table 19: Southern Utah University Statewide Economic Impact, FY 2023

Dollars in Millions

	Jobs	Earnings	GDP	Output
Campus	2,271	\$93	\$138	\$238
Direct	1,205	\$54	\$54	\$133
Indirect & Induced	1,066	\$39	\$84	\$105
Utah Shakespeare Festival	63	\$2	\$3	\$6
Direct	34	\$1	\$1	\$3
Indirect & Induced	29	\$1	\$2	\$3
SUU Total	2,334	\$95	\$141	\$244
Direct	1,240	\$55	\$55	\$136
Indirect & Induced	1,094	\$40	\$86	\$108

Source: Kem C. Gardner Policy Institute analysis of Southern Utah University data using IMPLAN 2022

Figure 14: Southern Utah University Out-of-state Revenue by Source, FY 2023



Note: Resident student aid includes Pell Grants, federal student loans, and private scholarships.
Source: Kem C. Gardner Policy Institute analysis of Southern Utah University data

Appendix B: Methods

Model Construction

This analysis uses a custom, multi-regional, 546-sector economic model for Utah's Southwest Economic Region (Beaver, Garfield, Iron, Kane, and Washington counties) and the rest of Utah. Built using IMPLAN's 2022 database, the model uses input-output (I-O) and social account matrix (SAM) frameworks to estimate how activity in one industry affects the entire economy. While analysts widely use IMPLAN, REMI PI+, and RIMS II for economic impact and contribution analysis, they most commonly utilize IMPLAN to estimate university contributions and impacts. As with any economic model, the accuracy of IMPLAN results depends on the fidelity of model assumptions and the quality of input data.

IMPLAN operates under key I-O model assumptions:

1. *Constant returns to scale* – Inputs per unit of output remain constant.
2. *Fixed input and technology structure* – The mix of inputs and technology necessary to produce a unit of output does not vary.
3. *Zero supply constraints* – Access to in-region and out-of-region raw materials and labor is unlimited.
4. *Fixed output mix* – An industry will produce the same mix of outputs at any level of production.
5. *Static model* – Prices and industry relationships do not change

Input Data and Geographic Scope

The report's economic contribution and impact analyses use SUU's FY 2023 revenue and expenditure data, adjusted to prevent double counting. For example, this report excludes student spending on tuition, fees, and on-campus housing, which serves as revenue for the institution, from the student spending analysis and captures it only in university operational spending.

To fully capture SUU's significance, this study measures its contribution to both the Southwest Economic Region and the state, as well as its impact on the state and the Utah Shakespeare Festival's impact on the region.

Measuring Economic Effects

The study utilized multi-regional input-output analysis to trace how spending in the Southwest Economic Region affects both the region itself and the rest of Utah, as well as how surrounding area impacts generate additional local effects. Summing the effects on the region and the rest of the state shows the total effects on Utah.

Operations

The study employs an industry impact analysis technique to measure the economic contribution of university operations broken out by the Utah Shakespeare Festival and broader campus. Inputs include:

- *Direct jobs* – average annual jobs;
- *Direct earnings* – Total payroll expenditures (wages, salaries, benefits, and payroll taxes)
- *Intermediate inputs* – Non-payroll operational spending (excluding capital, construction, scholarship spending, out-of-state travel expenses, and debt payments)
- *Output* – The sum of total labor income, intermediate inputs, taxes on production and imports (TOPI), and other property income (OPI). TOPI and OPI are set to zero because SUU is a state entity. This results in direct earnings equaling direct GDP.

Direct payroll models labor income that results in induced effects while intermediate inputs model intermediate demand changes that spur additional induced and indirect effects. Campus operations were modeled in industry 481: junior colleges, colleges, universities, and professional schools. Using SUU's detailed expenditure data, the Gardner Institute adjusted the spending pattern to align with SUU's actual expenditures (Table 20).

All in-state travel expenses were included with 50% allocated to hotels, 25% to ground transportation, and 25% to restaurants. The analysis allocated travel reimbursement the same way including only 50% of total expenditures assuming a more significant portion of this was spent out-of-state than accounted for in IMPLAN's social accounting matrix. For out-of-state travel, 40% of total expenses were allocated to air transportation (80%) and ground transportation (20%) assuming the hotel and restaurant spending occurred primarily out-of-state.

The analysis models Utah Shakespeare Festival operations in industry 496: performing arts companies. After examining detailed financial data, the spending pattern was not adjusted from IMPLAN's default spending pattern due to the lack of specificity in spending categories and to maintain a more conservative estimate.

To estimate the economic impact, SUU provided data on revenue sources. Economic impacts measure the economic activity of spending supported by out-of-region revenue. For statewide impacts, this analysis adjusts all inputs based on the share of out-of-state revenue for the broader campus (47.7%) and the Utah Shakespeare Festival (21.6%) (Appendix A). The main body of the report provides the regional impact of the Festival, calculated by adjusting inputs according to the share of Festival revenue from out-of-region (85.2%).

Table 20: Southern Utah University Spending Pattern, FY 2023

IMPLAN Commodity Code	IMPLAN Commodity Description	Share of Spending
3444	Other insurance	25.0%
3412	Retail services - Miscellaneous store retailers	15.4%
3478	Other support services	14.1%
3356	Other aircraft parts and auxiliary equipment	7.3%
3422	Warehousing and storage services	3.9%
3465	Advertising, public relations, and related services	3.7%
3428	Software publishers	3.4%
3447	Other real estate services	3.2%
3399	Wholesale services - Petroleum and petroleum products	3.1%
3048	Natural gas distribution	2.9%
3523	Business and professional services	2.6%
3511	All other food and drinking place services	2.5%
3482	Other educational services	2.0%
3414	Air transportation services	1.7%
3300	Computer terminals and other computer peripheral equipment	1.4%
3039	Electricity	1.1%
3384	Office supplies (except paper)	1.1%
3410	Retail services - Sporting goods, hobby, musical instrument and book stores	0.7%
3418	Transit and ground passenger transportation services	0.7%
3153	Printing support services	0.6%
3468	Marketing research and all other miscellaneous professional, scientific, and technical services	0.6%

IMPLAN Commodity Code	IMPLAN Commodity Description	Share of Spending
3504	Other amusement and recreation	0.5%
3507	Hotels and motel services, including casino hotels	0.5%
3157	Petroleum lubricating oil and grease	0.4%
3515	Commercial and industrial machinery and equipment repair and maintenance	0.3%
3049	Water, sewage and other systems	0.3%
3476	Services to buildings	0.3%
3425	Books	0.3%
3509	Full-service restaurant services	0.2%
3499	Independent artists, writers, and performers	0.1%
3526	US Postal delivery services	0.1%
3453	Commercial and industrial machinery and equipment rental and leasing services	0.1%
3417	Truck transportation services	0.1%
3516	Personal and household goods repair and maintenance	0.05%
3421	Couriers and messengers services	0.05%
3434	Wireless telecommunications (except satellite)	0.03%
3435	Satellite, telecommunications resellers, and all other telecommunications	0.03%
3400	Wholesale services - Other nondurable goods merchant wholesalers	0.02%
3429	Motion pictures and videos	0.005%
3450	Automotive equipment rental and leasing services	0.002%
3154	Refined petroleum products	0.001%

*Because SUU self-insures, the analysis includes insurance spending in its intermediate inputs and excludes it from payroll benefits, resulting in a large share of spending in IMPLAN 3444: other insurance.

Source: Kem C. Gardner Policy Institute analysis of Southern Utah University data using IMPLAN 2022

Table 21: Southern Utah University Capital Spending Commodities, FY 2023

IMPLAN Commodity Code	IMPLAN Commodity Description	Share of Capital Spending
3340	Automobiles	20.0%
3396	Wholesale services - Other durable goods merchant wholesalers	16.0%
3404	Retail services - Electronics and appliance stores	13.5%
3395	Wholesale services - Machinery, equipment, and supplies	12.6%
3393	Wholesale services - Professional and commercial equipment and supplies	10.5%
3269	All other industrial machinery	5.5%
3382	Sporting and athletic goods	3.7%
3499	Independent Artist, writers, and performers	3.0%
3247	Machined products	2.6%
3394	Wholesale services - Household appliances and electrical and electronic goods	2.3%
3260	Farm machinery and equipment	1.6%

IMPLAN Commodity Code	IMPLAN Commodity Description	Share of Capital Spending
3405	Retail services - Building material and garden equipment and supplies stores	1.5%
3270	Optical instruments and lenses	1.4%
3355	Aircraft engines and engine parts	1.3%
3453	Commercial and industrial machinery and equipment rental and leasing services	1.0%
3392	Wholesale services - Motor vehicle and motor vehicle parts and supplies	0.9%
3402	Retail services - Motor vehicle and parts dealers	0.8%
3354	Aircrafts	0.6%
3410	Retail services - Sporting goods, hobby, musical instrument and book stores	0.6%
3412	Retail services - Miscellaneous store retailers	0.6%
3304	Audio and video equipment	0.2%

Source: Kem C. Gardner Policy Institute analysis of Southern Utah University data using IMPLAN 2022

Construction and Capital

Due to the multi-year and variable nature of construction projects and capital purchases, the analysis modeled these purchases using a 5-year average of expenditures, adjusted to FY 2023 dollars, and combines broader campus and Utah Shakespeare Festival projects due to overlap. This analysis models construction expenditures as industry output in IMPLAN 53: construction of new educational and vocational structures.

The analysis models capital expenditures as commodity output events. SUU provided detailed data for most FY 2023 capital expenditures which were matched to IMPLAN commodities with each commodity share applied to the 5-year average (Table 21).

The analysis adjusts inputs based on SUU's out-of-state revenue share (47.0%) to estimate statewide economic impacts.

Nonresident Students

SUU provided student headcount data with the number of students attending from in-state and out-of-state and in-region and out-of-region (Table 8). The analysis excludes online students and uses headcount assuming that living expenses, like food, do not differ between full-time and part-time students.

SUU also provided cost of attendance estimates for the 2022-23 academic year. The analysis assumes each student attended two semesters and excludes spending on tuition/fees, books/supplies, and on-campus housing as these were largely accounted for in the university's operational expenditures.

To finalize nonresident student spending estimates, the analysis adjusted expenditures to account for student earnings in Utah to be consistent with the exclusion of off-campus spending of resident students from the analysis. Therefore, the economic contribution of nonresident students is equivalent to their economic impact.

The Gardner Institute obtained wage data from the Utah Data Research Center (UDRC) for all SUU students for FY 2019 and FY 2020, the latest available years. Based on these data, approximately 32.0% of out-of-state students and 82.0% of out-of-region students earned wages in state with average annual earnings of \$10,000 for out-of-state students and \$16,500 for out-of-region students (in FY 2023 dollars).

To refine the estimate, the analysis used two-thirds of these wages to account for two semesters of attendance and then applied a spending share for off-campus housing, food, transportation, and personal expenses, adjusting for excluded costs (tuition/fees and books/supplies). The analysis then multiplied these adjusted average wages by the number of working out-of-state and out-of-region students and subtracted this amount from total spending.

After calculating direct spending, the Gardner Institute used IMPLAN to estimate indirect and induced contributions. The analysis modelled spending as industry output events across eight IMPLAN industries. Off-campus housing estimates were modelled in IMPLAN 448: Tenant-occupied housing, food spending estimates were modelled in IMPLAN 511: All other food and drinking places, transportation expenses were split among IMPLAN 408: Retail – Gasoline Stores, 444: Other Insurance, and 512: Automotive repair and maintenance, except car washes, and personal expenses were modeled under 412: Retail – Miscellaneous store retailers, 504: Other amusement and recreation, and 517: Personal Care Services. The share of spending in each category was based on spending data from the U.S. Bureau of Labor Statistics Consumer Expenditure survey for the under 30 population.

These estimates are likely conservative for several reasons:

1. Some students attend three semesters or live in-region year-round leading to higher spending than accounted for in these estimates.
2. The analysis excludes all spending on books and supplies since the share spent off-campus could not be determined.
3. The analysis excludes in-state wage estimates for out-of-state and out-of-region students. Out-of-region students likely earned some of these wages in-state but outside the region. The analysis excludes all in-state wages since the region where wages were earned is unknown.
4. Cost of attendance data likely underestimates spending. While these estimates provide something close to a minimum cost of living for students, some students likely exceed these estimates while living in-region.

Nonresident Visitors

To estimate the economic effects of nonresident visitor spending, the analysis estimates both total visitors and average spending per visitor. Visitor spending estimates include five SUU events: the Utah Shakespeare Festival, Utah Summer Games, athletic events, campus tours, and commencement (Table 11). SUU provided estimated days in region for the Utah Shakespeare Festival (2.5) and Utah Summer Games (2). The analysis conservatively assumes one day in-region for athletics events, campus tours, and commencement.

After estimating total visitors, the analysis applied total spending assumptions and expenditure patterns to estimate total visitor spending. The analysis used Omnitrak's general leisure visitor profile data for Cedar City and St. George for three recent years (2021-2023), to derive total spending and expenditure pattern assumptions as averages. The analysis applies the spending patterns and amount spent per day by Cedar City/St. George visitors to SUU visitors.

Table 22: Southern Utah University Estimated Visitor Spending, FY 2023

IMPLAN Industry Code	IMPLAN Industry Description	Average Spending (per person, per day)
512	Automotive Rental	\$1.13
408	Retail-Gas Station	\$7.10
507	Hotels	\$17.39
509	Full-service restaurants	\$12.33
406	Retail-Food & Beverage	\$5.41
504	Other amusement and recreation	\$5.49
412	Retail-Miscellaneous	\$2.88
520	Other personal services	\$0.47
Total		\$60.13

Note: Based on the Omnitrak general leisure profile for Cedar City and St. George from 2021 to 2023, inflation-adjusted to 2023 dollars.
Source: Kem C. Gardner Policy Institute analysis of Omnitrak data using IMPLAN 2022

While SUU is located in Cedar City, the analysis includes Cedar City and St. George visitor spending data to enhance the visitor survey sample size and produce more accurate spending estimates. St. George is located approximately 50 miles southwest of Cedar City and is a popular southern Utah destination. Based on these data, an average visitor spends a total of \$60.13 per day. The analysis models this spending as industry output across eight IMPLAN categories (Table 22). The analysis multiplies average spending in each category by the estimated number of visitors from out-of-state and out-of-region before modelling.

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SUU Graduate Analysis

The Utah Data Research Center (UDRC) provided data on SUU graduates from 2016 and 2020. These data included the degree/award, residency status, whether the individual was working in-state (based on uninsurance claims from DWS), and if they were working, their wages for one- and five-years post-graduation. This data provided information on individuals from their education record (Utah System of Higher Education) and workforce record (Utah Department of Workforce Services). The Gardner Institute then calculated the share of graduates working in-state and average wages one- and five-years post-graduation by residency status and degree type.

Utah Data Research Center Disclaimer

Some of the data for this research was accessible through Utah's state longitudinal data system database administered by the Utah Data Research Center which includes data supplied by UDRC members. This research, including the methods, results, and conclusions neither necessarily reflect the views of, nor are endorsed by, the UDRC members. All errors are the responsibility of the author.



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