Request Name: Sundance Institute

Description: To support the economic and cultural contributions Sundance Institute brings to the State of Utah, this funding item is a continuation of the ongoing appropriation of $1,000,000 approved by the Legislature in 2018. In recognition of the substantial increases in economic impacts of the Sundance Film Festival, and an expansion of free community programming for Utah residents, an additional $500,000 is requested, for a total ongoing appropriation of $1,500,000.

Agency: Economic Development

Funding for: $1,500,000

Private Not-for-Profit

Sundance Institute
Annual Operating Budget FY19

		Budget FY19
REVENUE		
Contributed Revenue		
Individual Giving	$	9,022,584
Corporate		11,496,920
Foundation		8,827,403
Government		2,434,986
Benefit Events		660,000
Total Contributed Revenue	**$**	**32,441,893**
Endowment Draw	**$**	**965,000**
Earned Revenue		
Box Office		12,626,284
Submissions		1,118,575
Merchandise (net)		402,750
One Day Labs		115,800
Rental Income		110,000
Interest Income		200,000
Other Income		827,800
Contract Services		917,000
Total Earned Revenue	**$**	**16,318,209**
Total Revenue	**$**	**49,725,102**
EXPENSES BY PROGRAM		
General Administration		5,243,082
Communications		3,327,271
Development		4,190,507
Film Festival Program		17,856,167
Feature Film Program		3,328,880
Native & Indigenous		728,414
Film Music Program		541,179
Theatre Program		2,085,177
Diversity & Outreach		1,790,751
Documentary Film		5,347,120
Creative Producing Unit		2,083,048
Episodic Program		638,455
New Frontier		983,909
Public Programming		787,365
Digital		1,656,412
Total Expenses	**$**	**50,587,738**
NET INCOME/(DEFICIT)	**$**	**(862,636)**

Attachment E: Scope of Work

Objective/Purpose Statement: (provide a detailed description of project and how the funds will benefit the state and community)

Sundance Institute

MISSION

Sundance Institute is a nonprofit organization dedicated to the discovery and development of independent artists and audiences. Through its programs, the Institute seeks to discover, support, and inspire independent film and theatre artists from the United States and around the world, and to connect audiences to their new work.

HISTORY

Founded in 1981, Sundance Institute offers a year-round series of artist support programs including residency Labs, workshops, grants, and year-long Fellowships to independent artists working across a wide range of creative disciplines including fiction, non-fiction, feature-length, short form, episodic, theatre, and new media. Since 1984, the Institute has presented the Sundance Film Festival, attracting thousands of filmmakers, industry, press, technologists, talent, philanthropists, and enthusiasts each January. The Festival shines a spotlight on the most groundbreaking and innovative new independent storytelling projects and artists, set against the backdrop of Utah's Wasatch Mountains in Park City, Salt Lake City, and Sundance, Utah. The Festival is one of the largest and most influential independent film festivals in the world, generating tremendous economic activity, media coverage, and cultural impacts in the State of Utah.

FESTIVAL HOST STATE PARTNERSHIP

Through the Sundance Film Festival and residency artist support Labs in Utah, Sundance Institute offers year-round opportunities to recognize Utah as our Festival Host State, positioning the State as a destination for tourism, film production, and business to targeted industries including film and media, and broad audiences alike. Our Utah Community Programs, which we offer year-round and during the Festival, serve as a highlight of the cultural calendar for Utah students, educators, and residents, providing free access to unique, engaging, and high-quality moviegoing experiences.

The Sundance Film Festival generates substantial tourism activity for Utah, attracting more than 124,900 attendees annually. Please see the enclosed "Economic Impacts: 2018 Sundance Film Festival" for details on the economic activity generated by the Festival in 2018. The Festival is an effective driver of tourism to the State, and in partnership with the State of Utah, the Institute has leveraged this event to promote the many attractions beyond the Festival that Utah has to offer, successfully transforming first-time visitors into lifelong visitors to the State.

The Festival is a major annual event for the film industry, and provides the Utah Governor's Office of Economic Development, the Utah Office of Tourism and the Utah Film Commission with a platform for industry representatives and emerging and established filmmakers to discover the many resources

available in Utah. In particular, the Utah Film Commission has unique opportunities to network, promote Utah's Motion Picture Incentive and Community Film Incentive Program, and build interest within the industry in utilizing Utah's diversified terrain and growing film production infrastructure.

Beyond the economic activity and job creation generated directly through Festival activities, the Sundance Film Festival provides the State with unparalleled opportunities to attract business and new visitors to Utah. The Economic Development Corporation of Utah has repeatedly cited the Sundance Film Festival Site Selectors event as a tremendously popular and unique offering that plays a significant role in attracting new businesses to Utah. Site selectors often provide feedback that they rarely accept invitations from economic development agencies, but the opportunity to attend the Sundance Film Festival is too enticing to ignore. By leveraging the Festival's unique draw, EDCUtah has successfully brought new businesses to the State over the past 10 years, creating new jobs, capital investments, and economic opportunity to Utah. The Institute assists in these efforts by providing networking opportunities, entertainment of site selectors at the Festival, and branding the State in association with the Institute's national and international Festivals.

Key Activities/Commitments: (identify the work that will be completed throughout the project; ie: milestones)

SUNDANCE INSTITUTE AND THE STATE OF UTAH
FY19 Partnership

Sundance Institute is honored by the State of Utah's generous commitment of an appropriation of $1,000,000 via the Governor's Office of Economic Development to support our general operations in FY19, which will play an integral role in sustaining our efforts to serve as an economic driver to the State of Utah, support the creative and professional development of independent storytelling artists, present public programming to introduce audiences to their new work, and make critical investments in our operations and infrastructure. In acknowledgement of this valued partnership, the State of Utah will be recognized as the official Festival Host State of the 2019 Sundance Film Festival, and a portion of funds from this appropriation will support the delivery of Festival Host State recognition, branding, promotional opportunities, and hospitality benefits to the State of Utah as described below.

SUNDANCE FILM FESTIVAL: Festival Host State Recognition (Exclusive Partnership)
Sundance Institute will recognize our valued Festival Host State partnership with the State in mutually agreed upon Festival publications, on-screen, and in electronic and collateral materials, as detailed below:

Print Materials and Signage
Logo recognition unless line listing indicated:

- Program Guide (32,000 circulated annually)
  - Logo Recognition in Support for the 2019 Sundance Film Festival section
  - Sundance Institute Contributors List (Line Listing)
- Catalog (11,500 circulated annually)
  - Logo Recognition in Support for the 2019 Sundance Film Festival section
  - Welcome Letter and Photo in Catalogue from Utah Governor
  - REVISED OPTION FOR GOED LETTER - One-page to highlight Host State Partnership - TBD
  - Two-page, four-color acknowledgment devoted exclusively to the State
  - Sundance Institute Contributors List (Line Listing)
- REINSTATED - Step and Repeats featuring Utah Logo with logos of official SFF19 Presenting Sponsors
  - Featured at official Press Lines at Festival Theatres including Eccles, MARC and Library Theatres
  - Additionally featured at Salt Lake Opening Night Reception and Screening, as well as other Festival venues and events
- REINSTATED - Dual Branded Festival Lanyards with Sundance Film Festival and Utah Life Elevated logos, produced by Sundance Institute and approved by both parties. The Festival Lanyard is a high profile wearable item worn by all Directors, their Film Teams and Cast, Programmers, Jurors, all Festival supporters, guests, staff and volunteers (40,000 distributed)

- Day One Press Conference with Founder, Executive Director, Director of Sundance Film Festival and Festival Artists
    - NEW - Utah Logo included in backdrop/signage branding
- Credential Insert provided to all credentialed festivalgoers including filmmakers, industry, press, talent, volunteers, and general credential holders.
- Press and Industry Guide distributed to all credentialed press and industry
- Staff and Volunteer Information Materials
- Acknowledgements
    - "Thank you from Sundance Institute" advertisement in a national publication
    - "Thank you from Sundance Institute" advertisement in a local publication
- Select program and event publications throughout the year (Line Listing)

Digital: On-line, On-screen, and Other Media

Logo recognition unless line listing indicated:

- NEW - Dedicated Festival Trailer Tag played throughout the Festival, before every screening (220,000+ impressions)
- Festival Awards Ceremony On-screen presentation
- Festival Website - Support page with a hotlink from logo to select State of Utah website – Utah Office of Tourism - https://www.visitutah.com/ (7.3M page views from 2.7M unique users in 2018)
- Festival Social Media Feed/s, mutually approved by Institute and Sponsor, may include repost of "Extend Your Stay" article on Visit Utah website. Additional social media opportunities to be explored with Institute social media team.
- Mobile Application for festivalgoers, with a link to the Visit Utah website incorporated as an Explore Utah element (4.4M page views in 2018). Any other potential Mobile Application integrations TBD.
- Festival Boilerplate included in select e-mail updates and press releases sent by Institute to the Festival community (Line Listing)

On-Site Recognition

- Festival House Board displayed at each Festival theatre, official venues, box offices and events in Park City, Salt Lake City, and Sundance Mountain Resort
- Unique signage and recognition at mutually agreed Official Venues hosting State of Utah events

Verbal Recognition

- NEW - Acknowledgement during Day One Press Conference
- Acknowledgement from the stage during Park City Day One and Salt Lake Opening Night screening introductions
- Acknowledgement from the stage during Festival Awards Ceremony introductions

Tickets and Access – Screenings, Events and Venues

- Priority ticket selection pre-Festival

- 30 tickets - Park City Day One Screenings and Event (Up to 30 Roped Seats at first Eccles Screening)
- 30 tickets - Salt Lake Opening Night Screening and Event
- INCREASE - 180 tickets - Festival Screenings (Increase from 150)
- NEW - 100 tickets - Salt Lake City Festival Screenings ONLY
- NEW - 6 tickets - Shorts Program Awards Ceremony and Event
- 30 tickets - Festival Awards Ceremony and Event

- Priority on-site Development services during the Event
  - 60 on-site comp screening tickets
  - Opportunity to purchase additional screening tickets through Corporate Development Office ($25.00 per ticket)
- Customized Program for EDCU Site Selectors - events and screenings at the annual Festival
- NEW - Support the EDCU Site Selectors Conference Program hosted in Salt Lake City in 2019 to showcase the Sundance Film Festival, and the partnership between Sundance Institute and the State of Utah.

Private Screening

- One (1) Private Screening – Broadway Theatre (or similar theatre venue), Salt Lake City (Date TBD) OR four (4) group screenings (up to 10 people – 40 tickets total) in Salt Lake City and Park City (two at the Rose Wagner theatre and two at the Eccles Theatre).

Credentials

- 40 Festival Credentials
- 40 Guest Credentials
- NEW - Two (2) General Press Credentials (with full access to P&I Screenings - set up with the Festival Press Office). Names and photographs for credentials to be submitted by December 1, 2018. All onsite ticketing requests to be handled through Corporate Development office.
- Four (4) Working Press Credentials

Sanctioned Events and Venues

- Utah Film Commission Reception
- Utah Film Commission – Utah Film Commission on Main Venue (under Master Festival License if there is a decision to host a venue during SFF19)
- Opportunity for a small footprint (10'x10') within Festival Co-Op to promote the State of Utah initiatives and incentives
- Opportunity for a small footprint (6'x6') within Festival Headquarters to promote the Utah Film Commission initiatives and incentives – in or near the Artist Relations Department

SUNDANCE INSTITUTE RESIDENCY LAB PROGRAMS - REINSTATED BENEFITS AND RECOGNITION

Official Event

- Hosted Dinner for the Directors Lab in June 2019 at Sundance Mountain Resort, with an opportunity to welcome the Fellows, Advisors, and Lab Guests to Utah prior to evening screening.
- NEW - Provide Utah Film Commission incentives and marketing materials to Lab participants, with the opportunity to screen a Utah promotional piece (up to 90 Seconds) prior to official screenings – final content and length approved by Institute
- Opportunity to attend FY19 Lab Information Days with up to 4 guests
- Opportunity for up to six (6) emerging Utah Filmmakers to visit select Lab at Sundance Mountain Resort – program and access to be approved by Sundance Institute with Lab Operations team.

UTAH COMMUNITY PROGRAMS: Major Supporter - REINSTATED BENEFITS AND RECOGNITION

Sundance Institute serves more than 30,000 Utah students and residents each year through programming offered free of charge. The State of Utah's support contributes to the Institute's capacity to connect Utahns with world-class independent cinema. In FY19, these will include our longstanding programs held in Salt Lake County and Summit County, and NEW additional Utah Regional Screenings. Following are benefits to be offered to the State of Utah as a Major Supporter of Utah Community Programs.

Digital: On-line, On-screen, and other new media

Logo recognition unless line listing indicated:

- Screen Wash
- Partner House Board displayed at all official theatres and venues
- Community website - Support page
- Event promotion and marketing materials
- Recognition in series boilerplate included in select email updates and press releases (Line Listing)

On-site recognition

- Venue recognition via House Board displayed at Theatres - indoor and outdoor
- Verbal recognition via live announcements during screening introductions
- Opportunity to host an event at one of the Summer Film Series screenings
- Opportunity to conduct giveaways at Summer Film Series screenings

Deliverables/Performance Measures: (identify key metrics used to measures success of the project)

Sundance Institute measures the economic impact of the Sundance Film Festival on an annual basis. We partner with independent researchers who collect and analyze data including attendance rates, average spending and length of stay, and attendee demographics.

We additionally provide information on the Institute's spending and job creation relating to the Festival to contribute to the overall picture of economic impact. The study is limited by the data available (i.e. survey data administered and analyzed by independent researchers, foot traffic monitoring via Blyncsy, and the Institute's accounting records), and does not include spending by our partnering sponsors, unaffiliated businesses that operated during the Festival, airport taxes generated by attendees who traveled to the Festival through the Salt Lake International Airport, or secondary spending when visitors return to Utah.

Please see below a summary report of the economic impacts of the 2018 Sundance Film Festival. We anticipate that the 2019 Sundance Film Festival will generate similarly significant impacts for the State's economy.

Economic Impacts: 2018 Sundance Film Festival

Source: Y² Analytics

State Gross Domestic Product: **$191,570,651**
Utah's total profit, employee compensation, and taxes generated by the Festival

Impact on Earnings: **$100,014,978**
Impact on wages, salaries, and employer-paid benefits

State and Local Taxes: **$19,170,040**
*Not including airport tax

Jobs Supported: **3,323**
Sundance Institute and Festival attendee spending supported the addition of these jobs

Total Festival Attendance: **124,985**
Non-Utah Residents: 44,620
Utah Residents: 80,365

Publicity Value: **$93.2 Million**
Print, online, and broadcast coverage resulted in more than 62,000 stories showcasing Utah to the world.
**Source: Cision and Sundance Institute*

TOTAL FESTIVAL ATTENDEE SPENDING BY CATEGORY	
Lodging	$62,603,231
Meals	$40,369,794
Auto Rental	$6,293,613
Other Transportation	$13,947,252
Recreation and Entertainment*	$49,954,512
Other	$10,546,203

**excluding Festival ticket sales*

Demographics:

- Age: 42% of Festival attendees were aged 35 or younger.
- Education: More than 80% are college graduates, and more than 32% have a masters degree or higher.
- Income: 55.5% of attendees reported an annual income of more than $100,000.
- Out-of-State Visitors: Nonresidents accounted for 35.7% of all Festival attendees, or 44,620 visitors. The largest share of domestic visitors were residents of California (36.8%), New York (9.5%), Texas (5.6%), Florida (4.4%), Illinois (4.1%), and Colorado (4%). The largest share of international visitors came from Canada (37.6%), United Kingdom (12.2%), and Australia (10.2%).

Spending:

- Total spending: Attendee spending totaled $183,714,605. Nonresidents spent a total of $3,518 per person during their stay, and Utah residents spent an average of $334 each (primarily meals and recreation).
- Lodging: Visitor spending averaged $1,404 per person with an average length of stay of 6.4 days.
- Food and Beverage: Visitor spending averaged $684 per person.
- Recreation, Entertainment, and Other Purchases: Visitor spending averaged $1,039 per person.
- Transportation: Visitor spending averaged $391 per person.

Tourism:

- Of the 44,620 nonresident attendees, 30.6% reported that this was their first visit, and 88.9% indicated that they intend to return to the Festival next year.
- More than 22% of nonresident attendees reported that they intended to ski or snowboard in Utah during their stay.

Additional Statistics from outside Sources:

Sponsor Spending:

- The Sundance Film Festival is supported by more than 20 Official Sponsors from a variety of sectors. Though many official sponsors spend more than $1 million each on their Festival activations and hospitality programs contributing to the Utah economy, this spending is not part of the official survey and therefore not included in the Economic Impact report results.

Festival Press Coverage:

- In total, print, online, and broadcast coverage resulted in more than 62,000 stories and $93.2 million in publicity value.
- More than 1,070 credentialed press attended the Festival, as well as 225 film crews and still photographers, from 28 countries including Argentina, Australia, Austria, Brazil, Canada, Chile, China, Denmark, Egypt, Finland, France, Germany, Greece, India, Italy, Mexico, Netherlands, Nigeria, Poland, Portugal, Romania, Russia, South Africa, South Korea, Spain, Sweden, Switzerland, and United Kingdom.

In its current Fiscal Year 2019 (September 1, 2018—August 31, 2019), Sundance Institute is grateful to have the support of the State of Utah through the following granting programs:

- Utah Office of Tourism (Co-op Marketing Fund)
    - Grant total: $124,376

    - Purpose: To support Sundance Institute's annual marketing campaign to attract out-of-state visitors to the State of Utah through the Sundance Film Festival and the Institute's satellite Festivals in London and Hong Kong. Through this project, the Institute promotes the State's many natural, recreational, and cultural attractions to out-of-state audiences. In 2018, the total return on investment of this campaign was 55.58:1.

    - If awarded the total requested ongoing appropriation of $1,500,000, Sundance Institute will allocate a portion of this funding to support these activities, and will not apply for a renewed grant from the Co-op Marketing Fund for FY20.

- Utah Division of Arts and Museums (General Operating Support Grant Program)
    - Grant total: $14,400

    - Purpose: To support Sundance Institute's free, year-round programming for Utah residents. These programs include special screenings of Sundance Film Festival films for students and educators, community organizations, and residents, through which Utahns of all incomes and backgrounds are able to engage with world class independent films. In 2018, these programs reached thousands of Utahns from across the State, and were held in Park City, Salt Lake City, Sundance, Ogden, Kamas, and (new in 2018) St. George.

FOR RELEASE JUNE 1, 2018

ECONOMIC IMPACT
2018 SUNDANCE FILM FESTIVAL

AUTHORS

Quin Monson, Ph.D. Y^2 Analytics, Founding Partner
Sven Wilson, Ph.D. Notalys, Chief Economist
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FOR MEDIA OR OTHER INQUIRIES

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KEY DATA POINTS

At least 124,000 people attended the Sundance Film Festival between January 18 and January 28, 2018. Approximately 44,600 attendees came from out of state. These out-of-state visitors spent an estimated $157 million in Utah during the festival. Sundance Institute also directly contributed to the Utah economy via the costs of planning and producing the 2018 festival. In total, the Sundance Film Festival contributed the following to Utah's economy in 2018:

- $191.6 million in Utah gross domestic product
- 3,323 jobs for Utah residents
- $100 million in Utah wages
- $19.2 million in state and local tax revenue

BACKGROUND

The Sundance Film Festival is the flagship annual event of the non-profit Sundance Institute. The 2018 festival ran for 11 days between January 18th–28th, 2018 and drew at least 124,000 attendees to film screenings, panel discussions, and other interactive storytelling events in Park City, Salt Lake City, and at the Sundance Resort. Just over a third of the attendees came from out of state. These out-of-state visitors contributed to Utah's economy by participating in festival activities and purchasing lodging, meals, and entertainment during their stay. Sundance Institute also contributed directly to the local economy via direct spending on planning and producing festival events.

This report estimates the total economic impact of the 2018 Sundance Film Festival using observational and self-reported survey data about festival attendees, their attendance patterns, and their spending habits; and using Sundance Institute direct spending data. The report was sponsored by Sundance Institute.

There are additional sources of economic activity not accounted for in this report. We omit impacts due to spending by official festival sponsors, unaffiliated businesses that operated around the event, airport taxes for attendees that traveled through Salt Lake International Airport, and secondary spending for visitors that return to the state post-festival since these data sources were not made available to either Sundance Institute or to our research team.

This report includes a more accurate estimate of a hard-to-reach population of festival attendees, namely short-term visitors that attended one festival event but did not stay at the festival. New technological developments have enabled our team to better quantify this population and include them in our estimates this year.

METHODOLOGY

The estimates in this report rely on three categories of data: 1) Blyncsy radio signal sensors installed in each festival venue that collected passive data about devices moving in and around festival events, 2) self-reported

spending data collected through random samples via intercept surveys during the festival and online surveys immediately after the festival, and 3) accounting records from Sundance Institute about direct spending to produce the festival. Using these data sources, we produced estimates for attendance and average spending for both in-state and out-of-state attendees.

METHODOLOGICAL INNOVATIONS

Studies prior to 2017 relied almost wholly on intercept sampling at the festival to estimate attendance and spending. Intercept studies are incredibly useful, but in the context of a busy festival getting a true random sample is challenging. Interviewers can be prone to oversample attendees that are approachable, perhaps those who better match the interviewers own age, socioeconomic status, or other characteristics. We used a variant of a Systematic Random Sample—randomly sampling the locations and times as well as a random start and fixed interval of interviewing to assure interviewers did not subconsciously bias the sample. Additionally, we conducted a separate random sample survey of ticketholders via online invitation immediately after the festival concluded. The results of that survey closely match the intercept survey, giving us the same demographic results across two separate survey modes.

Prior to 2017, attendance was estimated using a combination of the number of filled seats at film venues and an adjusted self-report of films attended per survey respondent. The self-reports were adjusted because film attendance by attendees is demonstrably over reported in the surveys. For example, the average survey respondent reports attending five films, which is not consistent with objective ticket redemption data. Additionally, the attendance estimate methodology has not been consistent over time. Instead of relying on self-reported attendance, technological advances allow us to take advantage of sensor technology that tracks devices that have Wi-Fi or Bluetooth radios inside of the festival venues. This allows us to directly and anonymously observe mobile devices as they enter the festival, move from venue to venue, and leave. The resulting attendance estimate is both higher and more accurate than previous years.

Our team first used this technology to estimate attendance in 2017 with twenty-two sensors installed in main festival venues. This year there were thirty-six sensors installed across nearly all the festival venues. These additional sensors captured more devices and allowed our team to quantify and estimate a population of attendees that has been undercounted in past years – short-term attendees. These are visitors that come to one single event at the festival and then leave. Historically they have been challenging to quantify because their short visit does not facilitate interviewing them. These additional sensors allow us a chance to see their impact on the festival.

ATTENDANCE ESTIMATES

For our attendance estimates, we rely on data provided by Blyncsy, an innovative Utah company that specializes in sensors that anonymously track individuals throughout an environment via their cell phones. For this analysis, each device is assigned a unique ID and the Blyncsy data reports where and when that device is seen at various festival venues as measured by thirty-six sensors installed across the festival footprint (including venues in Park City, Sundance Resort, and Salt Lake City). The Blyncsy sensor system captures any device equipped with a WiFi or Bluetooth radio, but the captured data does not make a distinction between which devices belong to identified festival attendees and other devices. In order to be conservative about attendance estimates, we

implemented a set of rules to determine which devices counted as devices in the hands and pockets of festival attendees. We counted as festival attendees devices that either attended two or more events or that stayed the entire time at one ticketed event (generally a film screening). Additionally, to identify Park City regulars, we screened out devices that were seen in the geographic vicinity before or after the festival. Using these parameters, we estimate 124,985 unique attendees over the course of the festival. We also assume that all or nearly all attendees carry a cell phone or other mobile device with them during the festival. Festival attendees without mobile devices do not count toward this attendance estimate. This estimate is significantly higher than prior years because it includes a population of short-term attendees that was difficult to estimate using prior methodologies.

For an apples-to-apples comparison to 2017, we ran a version of attendance estimates that only includes the twenty-two sensors that were in place last year. Using that limited set of sensors, we show an attendance of 71,669 participants – just a few hundred more than estimated in 2017. Importantly, this limited sensor set does not include a sensor installed at a new theater venue this year. This suggests that while the festival has definitely seen some year-over-year growth in attendance, the large increase in attendance we are reporting this year is mostly a factor of undercounting short-term attendees in prior festivals.

SURVEY METHODS

Our research team conducted three surveys to determine spending among festival attendees: 1) random intercept interviews during the festival at festival screenings and other official festival venues, 2) an online survey among ticket-buyers immediately after the festival, and 3) an online survey immediately after the festival among festival attendees that were not available in the screening lines, which generally consists of industry professionals, VIPs, and other contributors to the festival.

Intercept interviewers from Y^2 Analytics were on site throughout the festival. The interviewers were assigned to events in Park City, Salt Lake City, and at the Sundance Resort using a random assignment algorithm. We used Systematic Random Sampling techniques to select survey respondents. At film screenings, interviewers were given a random starting place and a fixed interval (for example, start on the 13th person in line and interview every 5th person) to approach festival-goers in line waiting to enter the film. Similarly, when assigned to non-film events interviewers were given a random starting place and a fixed interval to approach attendees as they passed by. Surveys were self-administered on paper questionnaires, which allowed interviewers to maintain the random interval and interview multiple attendees simultaneously. In total, we interviewed 1,049 festival attendees in person.

Additionally, we fielded a similar instrument via an online survey among Sundance Institute database ticket buyers shortly after the festival. Ticket buyers were selected at random to participate and invited over email with one follow up reminder. Those who had already been sampled to take the intercept survey were screened out of this sample. In total, we interviewed 1,197 festival attendees online. The results of the online survey weighted to attendance proportions between Park City and Salt Lake City were statistically equivalent to the intercept survey.

Finally, we fielded the same online instrument among a database of festival pass-holders. These attendees included industry professionals, VIPs, and other festival contributors who are not generally available in the lines outside theaters. In total, we interviewed 169 festival pass-holders.

YEANALYTICS

ECONOMIC IMPACT

Spending during the Sundance Film Festival generates many positive economic benefits. Tourism-related industries are beneficiaries of spending that would not otherwise be part of the state's economy, and that spending entering the state induces additional spending as companies hire additional labor, increase their capacity, and purchase the goods that are necessary to accommodate the additional visitors.

The detailed surveys conducted of festival attendees provide data on how much attendees spend on a variety of services: lodging, meals, transportation, recreation, and other retail expenses. For each category of spending, we apply the latest available (2015) RIMS II economic multipliers produced by the U.S. Bureau of Economic Analysis. These multipliers capture how much additional spending is induced by the festival. The RIMS II model also estimates the effect of the festival on earnings in the state, and the number of jobs produced.

Sundance Institute spending that is necessary to sustain the festival also contributes to the economic impact and its contribution to the total economic impact is also included.

The primary economic impact of spending coming from outside the state is referred to as *State Gross Domestic Product (State GDP)*. This is the *value-added* of all goods and services. It includes direct spending by visitors to the festival, indirect spending, which is the value of inputs that are produced by other local businesses, and induced expenditures, which result from the increased spending by Utah households. State GDP removes the value of intermediate inputs and, thereby, captures new spending that occurs because of the festival.

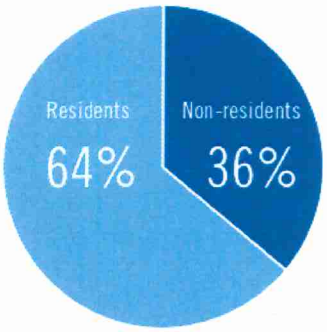
We also report a measure of *Total Output*. This measures the value of every dollar *associated* with spending on the festival. However, Total Output includes intermediate goods and, therefore, contains some double-counting. We include this as a reference value but note that the true economic impact is captured best by the State GDP estimate.

Finally, using data from a number of sources, we develop estimates of state and local taxes (sales taxes and income taxes) that result from the increase in spending and earnings in the state.

RESULTS

ATTENDEES: NUMBERS & CHARACTERISTICS

Figure 1: Proportion of non-resident attendees



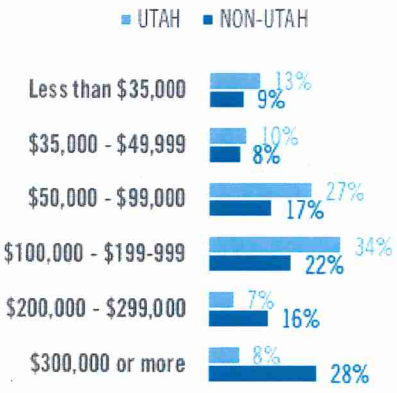
About 124,985 attendees filled 232,594 seats at events over the course of the festival. An estimated 64% of attendees were Utah residents (about 80,000 individuals) while 36% came from out of state (about 45,000 individuals). About 37% of non-residents came from California, 10% from New York, 6% from Texas, 4% from Florida, 4% from Illinois, 4% from Colorado, 3% from Massachusetts, and 33% from other states. Approximately 3% of non-resident attendees traveled from outside the United States to attend the festival, representing at least 26 different countries.

The estimated number of out-of-state attendees is up from prior years (up from an estimated ~37,500 last year) , however the percentage of attendees coming from Utah is significantly higher than in prior year's reports. This is because the historically undercounted short-term attendees are disproportionately Utah residents. By including them in the attendance figures, the percentage of in-state attendees goes up significantly even though the absolute count of out-of-state attendees has increased.

94% of non-resident attendees reported attending multiple days of the festival, with 61% of non-residents staying between 2 and 5 days. 87% of Utah residents attended only one or two days of events. A majority of Utah resident attendees came from Salt Lake County (37%), Davis County (26%), and Summit County (16%).

Out-of-state festival-goers tended to come from relatively high-income households. 44% of non-resident respondents reported a household income of $200,000 or more. Resident attendees also came from relatively high-income households in Utah; the modal category is $100,000 – $199,999 per year.

Figure 2: Attendee income



Though this is an industry event, many attendees are not entertainment industry professionals (47%). 8% of non-resident participants are students, about 2% are press, and 42% work in non-entertainment fields.

SPENDING

Table 1below provides estimates of aggregate spending by both residents and non-residents of Utah. Utahns spend almost $27 million dollars to participate in the festival. This number is far exceeded, however, by the amount spent by non-residents. People coming to the state spend over $156 million during their stay here, not including purchases of tickets to the festival.

TABLE 1: AGGREGATE SPENDING

	UTAH	NON-UTAH	COMBINED
Lodging	$-	$62,603,231	$62,603,231
Car Rental	$127,318	$6,166,295	$6,293,613
Other Transportation	$2,674,029	$11,273,223	$13,947,252
Meals	$9,891,170	$30,478,623	$40,369,794
Recreation & Entertainment	$12,194,069	$37,760,443	$49,954,512
Other Spending	$1,980,107	$8,566,096	$10,546,203
Total	$26,866,694	$156,847,911	$183,714,605

Tables 2 & 3 summarize spending on a per-person basis. Spending across all categories was $3,518 for each out of state visitor or a total of $688 per day. Utahns, primarily because they seldom need lodging, spent less but still purchased $334 in goods and services during the festival, or $120 per day.

TABLE 2: AVERAGE TOTAL SPENDING BY CATEGORY

	UTAH	NON-UTAH
Lodging	$-	$1,404
Car Rental	$2	$138
Other Transportation	$33	$253
Meals	$123	$684
Recreation & Entertainment	$152	$847
Other Spending	$25	$192
Total	$334	$3,518

TABLE 3: AVERAGE DAILY SPENDING BY CATEGORY

	UTAH	NON-UTAH
Lodging	$-	$218
Car Rental	$0	$22
Other Transportation	$13	$51
Meals	$44	$152
Recreation & Entertainment	$52	$206
Other Spending	$10	$39
Total	$120	$688

ECONOMIC IMPACTS

The spending by non-residents and by Sundance Institute contribute economically to the state. Table 4 summarizes the economic impact of this spending. We estimate that the economic impact of the festival (State GDP) is over $191 million. Most of this is due to spending brought in by visitors to the state. The total amount of economic activity associated with the festival is $331 million, though we caution again that this value contains significant double-counting for some types of expenditures. Nonetheless, the festival has a sizeable impact on the state economy.

TABLE 4: ECONOMIC IMPACTS

	NON-RESIDENT	SUNDANCE INSTITUTE	COMBINED
Total Spending	$156,847,911	$12,479,760	$169,327,671
Economic Impact (State GDP)	$179,794,290	$11,776,360	$191,570,651
Total Output	$310,527,314	$20,167,595	$330,694,910
Earnings	$93,720,914	$6,294,064	$100,014,978
State and Local Taxes	$18,909,746	$260,294	$19,170,040
Jobs	3,158	164	3,323

The festival has other economic impacts. We estimate that the annual employment associated with the festival is 3,323 jobs and total earnings of those employees is over $100 million. Additionally, we estimate that the festival generates $19 million in state and local taxes. These are revenues that would not be available to the state without the festival.

APPENDICIES

APPENDIX A: ATTENDEE RESIDENCY STATUS

Utah	64.3%
Non-Utah	35.7%

APPENDIX B: ATTENDEE AGE

	TOTAL	UTAH	NON-UTAH
Under 18	0.1%	0.0%	0.1%
18-25	15.9%	18.9%	10.6%
26-35	26.0%	27.1%	24.1%
36-45	19.2%	18.5%	20.4%
46-55	18.2%	19.0%	16.6%
56-64	15.1%	11.1%	22.1%
Over 65	5.6%	5.3%	6.1%

APPENDIX C: ATTENDEE GENDER

	TOTAL	UTAH	NON-UTAH
Male	31.7%	26.9%	40.3%
Female	66.9%	71.3%	59.0%
Other	1.4%	1.8%	0.6%

APPENDIX D: ATTENDEE EDUCATION

	TOTAL	UTAH	NON-UTAH
High School Graduate or Less	2.8%	3.2%	2.0%
Some College	16.9%	21.3%	9.0%
Bachelor's Degree	48.1%	47.2%	49.6%
Master's Degree	23.1%	20.1%	28.5%
Doctorate/Other Post-Grad	9.1%	8.2%	10.8%

APPENDIX E: ATTENDEE INCOME

	TOTAL	UTAH	NON-UTAH
Less than $35,000	11.9%	13.4%	9.2%
$35,000 - $49,999	9.4%	10.1%	8.3%
$50,000 - $99,000	23.2%	26.9%	16.6%
$100,000 - $199-999	29.8%	34.2%	21.8%
$200,000 and Over	10.1%	7.0%	15.7%
$300,000 or more	15.6%	8.4%	28.4%

APPENDIX F: ATTENDEE OCCUPATION

	TOTAL	UTAH	NON-UTAH
Entertainment Industry	11.8%	2.8%	28.1%
Non-Entertainment Industry	47.0%	50.1%	41.6%
Press	1.8%	1.5%	2.2%
Student	10.6%	12.1%	7.9%
Other	28.8%	33.5%	20.2%

APPENDIX G: ATTENDEE INTENDED TO SKI OR SNOWBOARD DURING FESTIVAL

	TOTAL	UTAH	NON-UTAH
Yes	24.7%	26.1%	22.2%
No	75.3%	73.9%	77.8%

APPENDIX H: COUNTY OF RESIDENCE (UTAH)

	UTAH
Salt Lake	36.8%
Davis	26.3%
Summit	15.6%
Utah	10.7%
Wasatch	5.9%
Weber	3.0%

Other	1.7%

APPENDIX I: MOST ATTENDED VENUE

	TOTAL	UTAH	NON-UTAH
Park City	57.9%	45.6%	80.0%
Salt Lake City	35.4%	45.6%	17.1%
Sundance Resort	6.7%	8.8%	2.9%

APPENDIX J: EVER ATTENDED SUNDANCE FILM FESTIVAL BEFORE

	TOTAL	UTAH	NON-UTAH
Yes	72.0%	73.5%	69.4%
No	28.0%	26.5%	30.6%

APPENDIX K: PLANNING TO RETURN AND ATTEND FILM FESTIVAL NEXT YEAR

	TOTAL	UTAH	NON-UTAH
Yes, Definitely	50.0%	50.4%	49.2%
Yes, Probably	41.8%	43.0%	39.7%
No, Probably not	8.0%	6.5%	10.8%
No, Definitely not	0.2%	0.0%	0.4%

APPENDIX L: STATE OF RESIDENCE (NON-UTAH)

	NON-UTAH
California	36.8%
New York	9.5%
Texas	5.6%
Florida	4.4%
Illinois	4.1%
Colorado	4.0%
Massachusetts	2.9%

Other	32.7%

APPENDIX M: COUNTRY OF RESIDENCE (NON-US)

	NON-US
Algeria	1.1%
Argentina	2.2%
Australia	10.2%
Austria	1.1%
Brazil	3.3%
Canada	37.6%
China	1.1%
Colombia	2.2%
France	1.1%
Germany	2.2%
Iceland	2.1%
Indonesia	1.1%
Italy	2.2%
Japan	2.2%
Korea	1.6%
Mexico	3.3%
Norway	1.1%
Russia	1.1%
Slovenia	1.1%
South Africa	1.1%
South Korea	1.1%
Spain	2.2%
Sweden	2.1%
Switzerland	2.1%
United Kingdom	12.2%
Uruguay	1.1%

APPENDIX N: FESTIVAL DAYS ATTENDED

	TOTAL	UTAH	NON-UTAH
1	25.2%	36.0%	5.8%
2	36.7%	51.0%	10.9%
3	7.9%	1.2%	20.0%
4	5.7%	1.6%	13.2%
5	7.3%	1.9%	16.9%
6	4.2%	1.3%	9.4%
7	3.6%	1.3%	7.6%
8	1.6%	0.9%	2.8%
9	1.3%	1.1%	1.8%
10	3.1%	1.9%	5.3%
11	3.4%	1.8%	6.1%
Average	3.2	2.3	5.0

ABOUT THE AUTHORS

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Quin Monson is a recognized survey researcher and a founding Partner at Y² Analytics. He has extensive experience executing scientific surveys nationally and in dozens of states. He has particular expertise with sampling, weighting, and online modes. He has fielded numerous political, academic, and professional surveys via traditional phone techniques, novel internet modes, and increasingly rare in-person interviews. Quin received his Ph.D. from the Ohio State University where he focused on public opinion, elections, and survey research methods. He is a Senior Scholar of the Center for the Study of Elections and Democracy and an Associate Professor of Political Science at Brigham Young University.

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Sven E. Wilson is an economist with over 25 years of experience doing empirical analysis in the areas of economics, public policy and demographics. He is a founding Partner of Notalys, a Utah-based economic and public policy consulting firm that has done numerous policy analyses in the state of Utah in recent years. He is a graduate of Brigham Young University and holds a Ph.D. in economics from the University of Chicago. He is professor of public policy at BYU, where he has taught policy research and data analysis, and he is a research economist at the National Bureau of Economic Research.

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Jay Goodliffe is a Partner and Chief Methodologist at Notalys. Dr. Goodliffe has taught and researched public policy in Utah and nationally for 20 years, with primary specialty in statistical methodology and applying advanced methods to practical problems. He received his bachelor's degree from MIT, and his master's degree and Ph.D. from the University of Rochester. His experience includes designing, administering, and analyzing complex survey data; assessing incentive and information systems in market and non-market environments; compiling and synthesizing disparate databases to identify patterns and relationships; and conducting cost-benefit analyses. He has published numerous articles in the areas of methodology, game theory, and social network theory. At BYU, Dr. Goodliffe teaches classes on statistical analysis, econometrics, multilevel models, game theory, and data visualization.