Calendar Year 2013 – Utah
TravelsAmerica Visitor Profile Report

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Growth Summary

TNS Growth Map

Your business issues

- In 2012,* tourism contributed $7.4 billion to Utah's economy, generating $961 million in taxes and 129K jobs (inclusive of indirect impact), second only to primary metals as an "export."
- To increase visitation and tourism revenue, the Utah Office of Tourism profiles visitors to better select the best media, best messaging, and best markets to:
  - Motivate more people to visit and/or come more often so they can explore Utah's outdoor adventure paradise, history/culture, sports, and entertainment
  - Advocate longer trips that would add to lodging and general tourism revenue
  - Draw potential visitors to build revenue.

http://www.travel.utah.gov/research_and_planning/documents/TourismSummary9-18-13v3.pdf

Growth Summary

Growth insights

- Enticing those living in or traveling to Western US areas (even non-border states, unlike most travel destinations) to add or extend trips to nearby Utah could help attract new visitors.
- Connect with both younger *Adventure/Sports enthusiasts* and higher-spending *Outdoor enthusiasts* to boost Utah tourism.
- The largest type of visitors, *Family/Friend/ Reunions* warrant less attention; they will likely visit regardless of Utah Office of Tourism efforts and spend less than any other type.
- Instead, those coming for *entertainment, sightseeing, and art/culture/history* represent sizeable groups that spend much more than those visiting family/friends.
- Travel is more heavily dependent upon online resources for research and purchase than any other industry and they provide an efficient means for Utah to reach potential visitors.
- Separately, the “Life Elevated” theme is a good example of highlighting activities that can build synergy throughout various media.

Note: See glossary for activities describing each type (slide 65)

Precise plans for growth

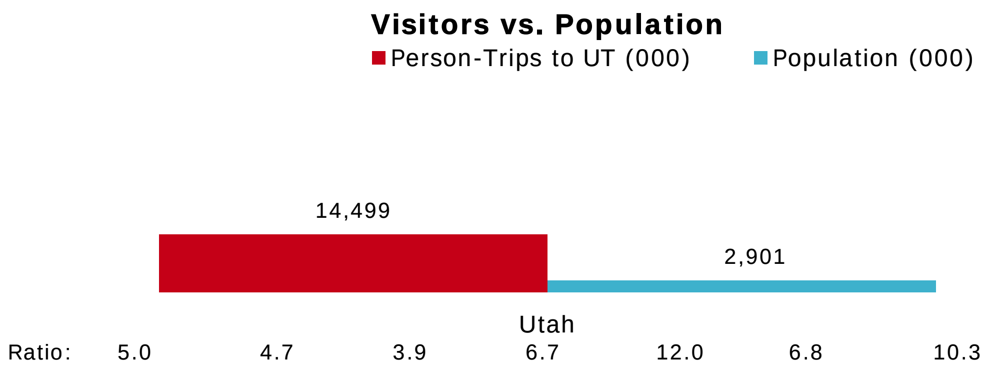
- Maintain focus on larger nearby markets within driving distance and explore communication partnerships with nearby states aimed at attracting more travelers to the West (e.g., *come for Nevada’s gaming, but spend time to view Utah as well*). Focus communication in Western states as the advertising budget allows.
- Highlight messaging on activities that attract younger visitors and larger spenders, particularly Utah’s vast array of state/national parks, wildlife, and opportunities to engage in adventure sports.
- De-prioritize marketing messages that target those visiting *Family/Friend/Reunions*.
- Entice *sightseers* (both rural and urban) and *art/cultural/history* types with Utah’s beautiful topography and its depth of history/churches.
- Continue to build an online presence to reach potential travelers, particularly young adventure travelers, not only with the already excellent website, but owned social media sites (Facebook, Instagram, Twitter, etc.). Use “Life Elevated” to weave a theme throughout messaging to attract these visitors.

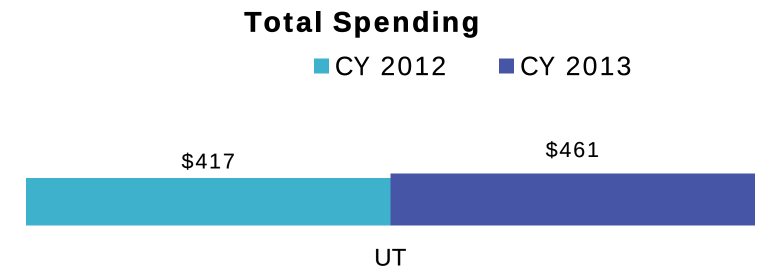
2
Executive Summary

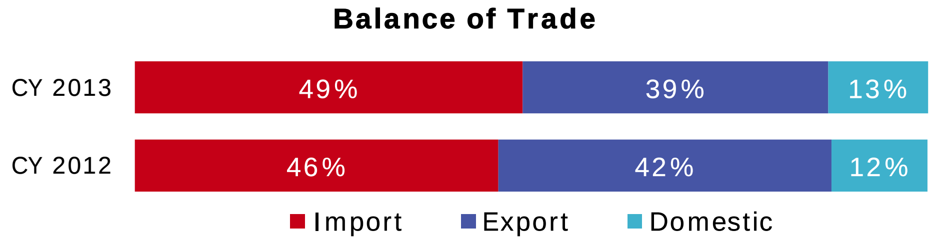
Executive summary

Tourism = Important to Utah

- Financially, tourism brings revenue, not only directly to industry businesses, but in taxes (sales/lodging/etc.). "Visitors per person" helps to show the relevance of tourism to Utah. The ratio, with 5 visitors per person, places Utah 5th among these 7 states (notably, Wyoming gets a lift from Yellowstone; Nevada from gaming).
- Utah and Nevada note increases in visitor spending from last year while other competitors remain relatively stable. For Utah, the increase coincides with a shift toward more nights in hotels/motels from private homes.
- Utah generates a nearly even "balance-of-trade" by selling Utah to enough in- and out-of-state visitors to offset the amount that residents spend by traveling elsewhere (import). Separately, the small drop in "export" spending suggests that Utah could re-emphasize features within the state to encourage out-of-state visitors to spend more time and $$$ in Utah.







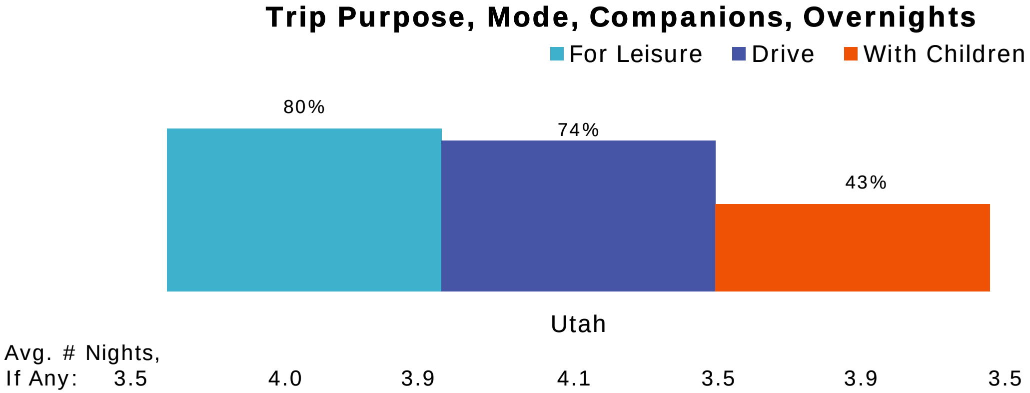
Import represents $ leaving UT
Export represents $ coming into UT
Domestic represents $ staying in UT

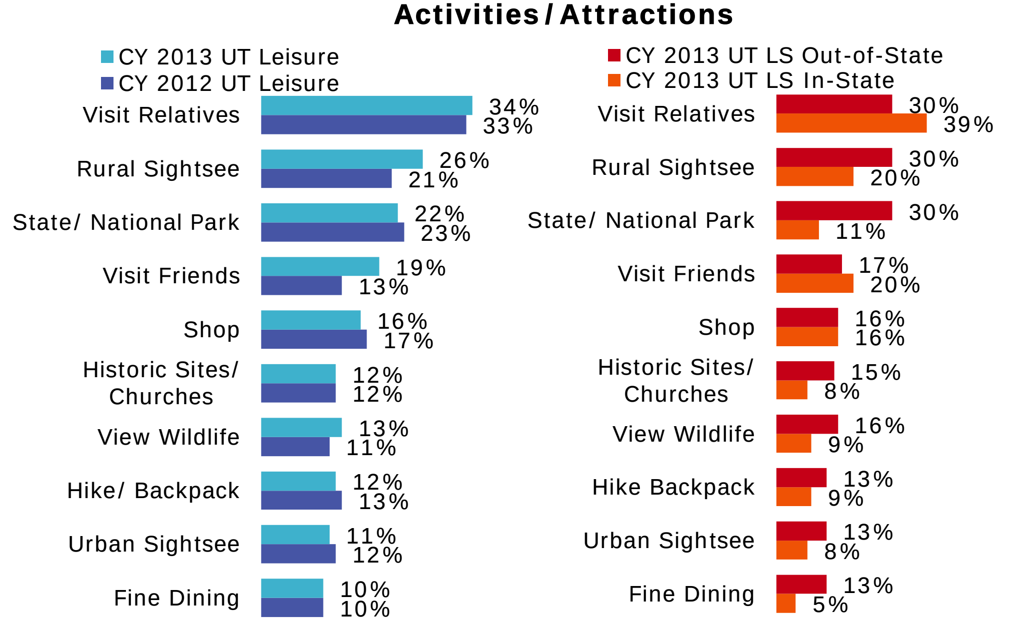
Executive summary

Why they come; what they like

- Similar to competitive states, Utah primarily entertains leisure visitors, most visitors drive, and the average stay hovers between 3 and 4 nights. Utah visitors, and secondarily Idaho, much more likely bring their children.
- Nevada, aided by Las Vegas, offers a contrast to other competitors, luring more flyers and smaller groups.

- Generally very similar to a year ago, visitors have increased participation in a couple of activities: rural sightseeing, visiting friends.
- Out-of-state visitors more likely to take advantage of Utah's many outdoor features – especially sightseeing and visiting parks, historic sites, and viewing wildlife.





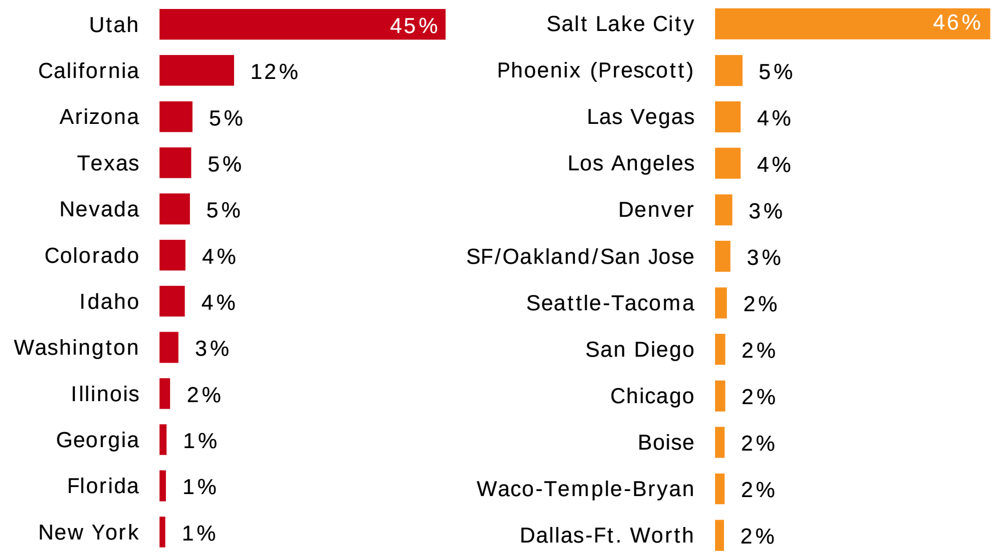
Executive summary

From where they come; to where they go

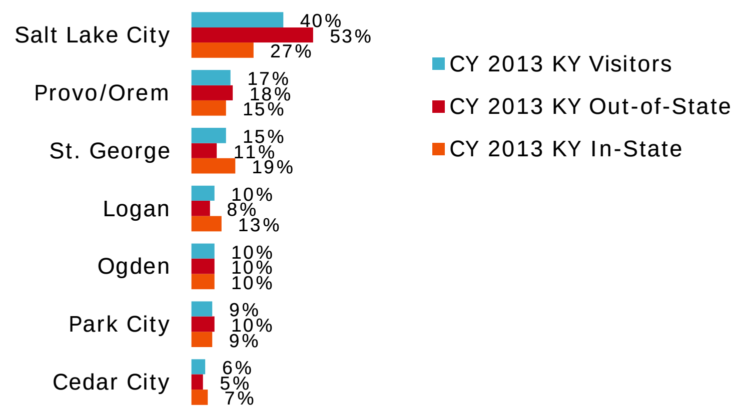
- Utah primarily draws visitors from within its borders and these nearby states: California, Arizona, Texas, and Nevada. Unlike many destinations, the key source markets do not always border Utah (notably, California and Texas).

- The largest Utah cities attract the most visitors, regardless of where they live. However, some differences appear by residence, with out-of-state visitors more likely choosing Salt Lake City while in-state visitors more likely St. George and Logan.

From Where (CY 2013) …



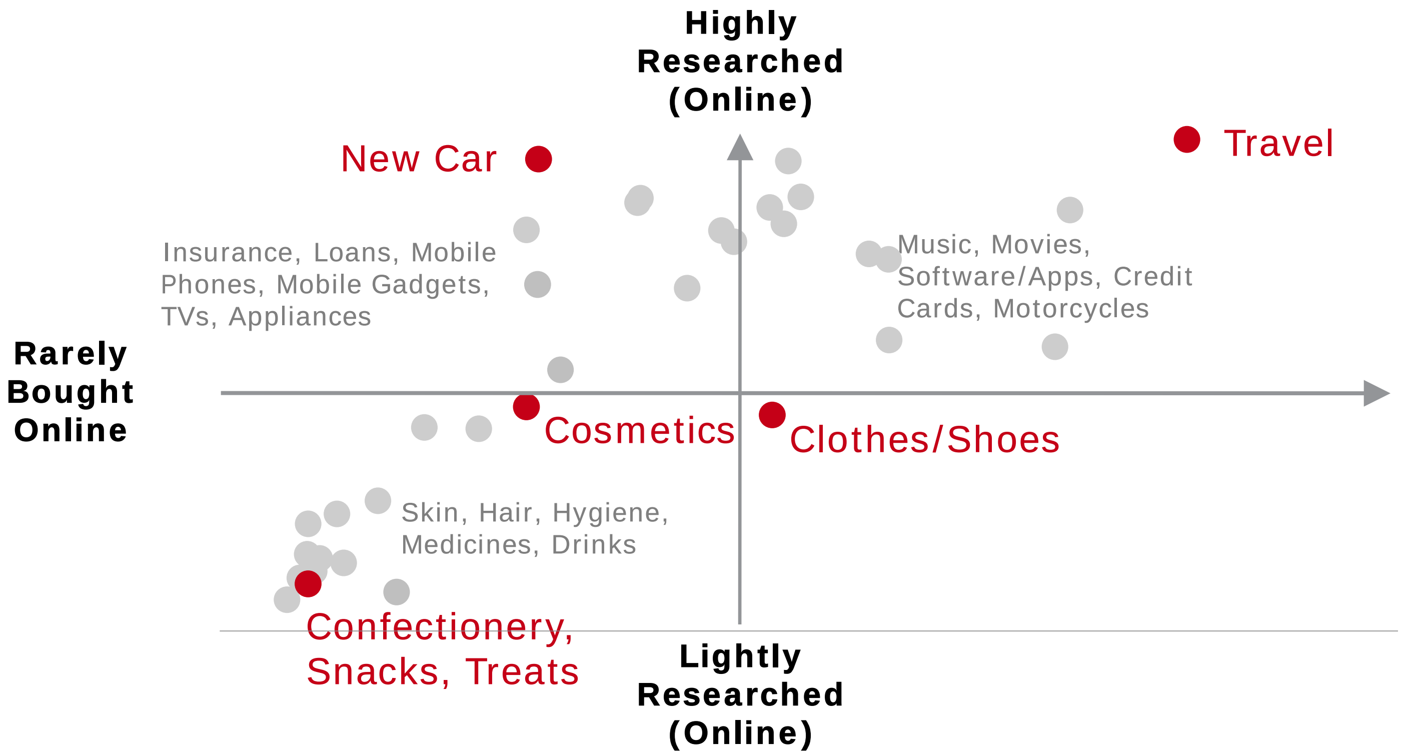
To Where …



Executive summary

Digital life

- Travel planning and purchases both heavily depend upon online resources, far more than any other product.

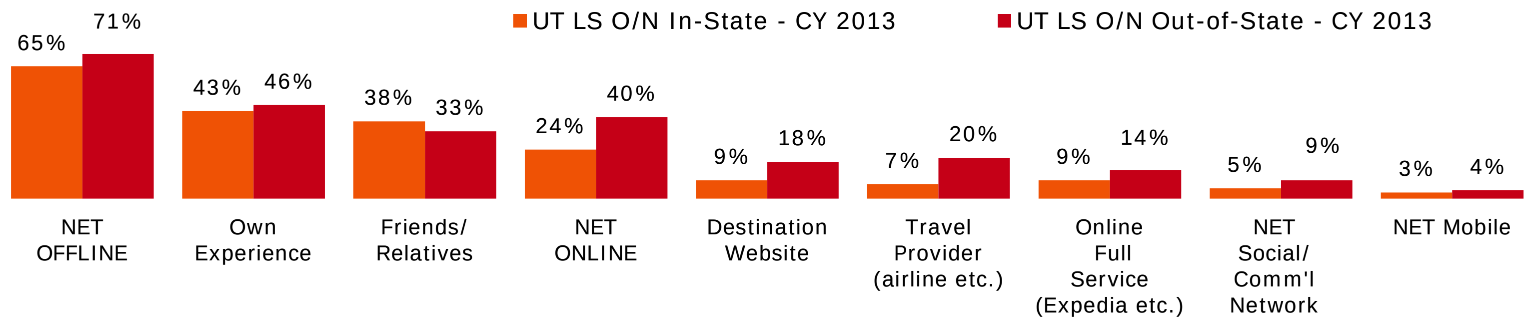


Executive summary

While online resources aid planning, travelers more often rely on their *own experience* and *friends/relatives* to **plan**. They usually **book** online.

- Utah visitors gather information offline similarly, regardless of residency. However, out-of-state visitors' online usage far exceeds that of in-state visitors.

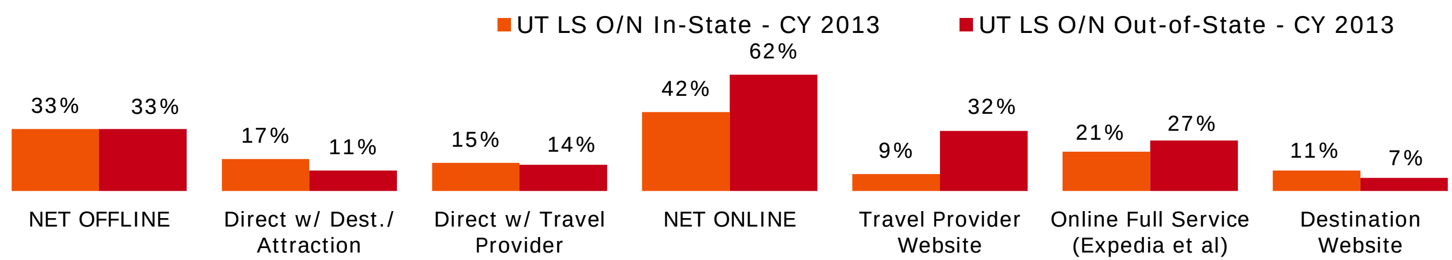
Planning



Note:
LS = Leisure
O/N = Overnight

- In-state residents are more inclined than out-of-staters to book directly with the provider.

Booking



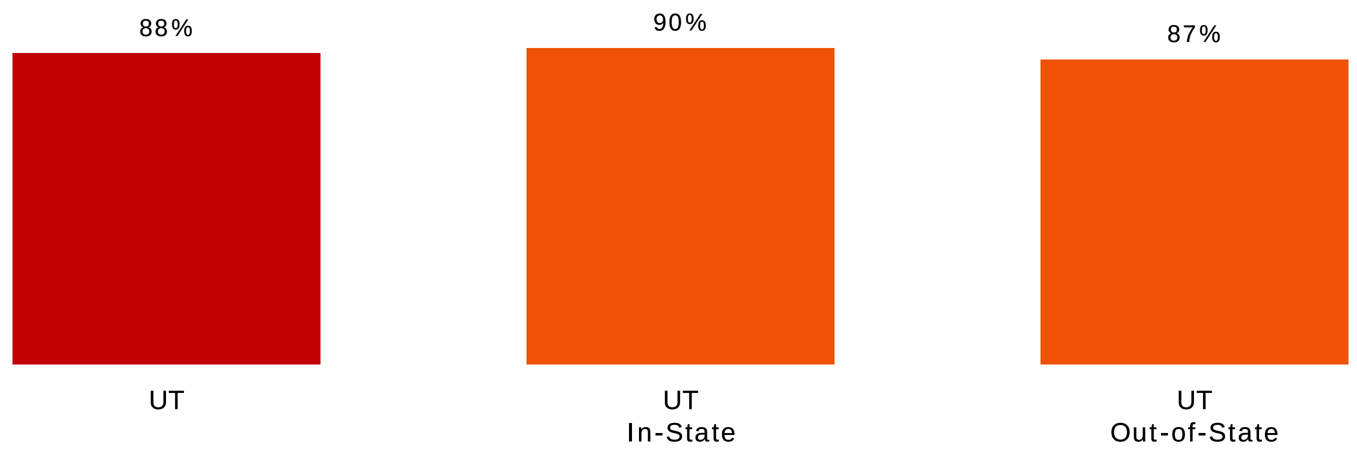
Those not booking/ someone else booked not shown

Executive summary

Utah delivers satisfaction

- Utah visitors return home very satisfied with their trip, with slightly greater satisfaction for residents than for those who come from out-of-state.

Satisfaction: Extremely / Very Satisfied with Visit to State (CY 2013)



Executive summary

Type of Travel:
Sizing and Revenue

- *Family/reunions* boast, by far, the largest visitor participation of any niche; however, they spend the least of any group
- The biggest spenders tend to be those taking at least some interest in Utah's outdoor features: Nature/Outdoors, Parks/Gardens, Adventure Sports.

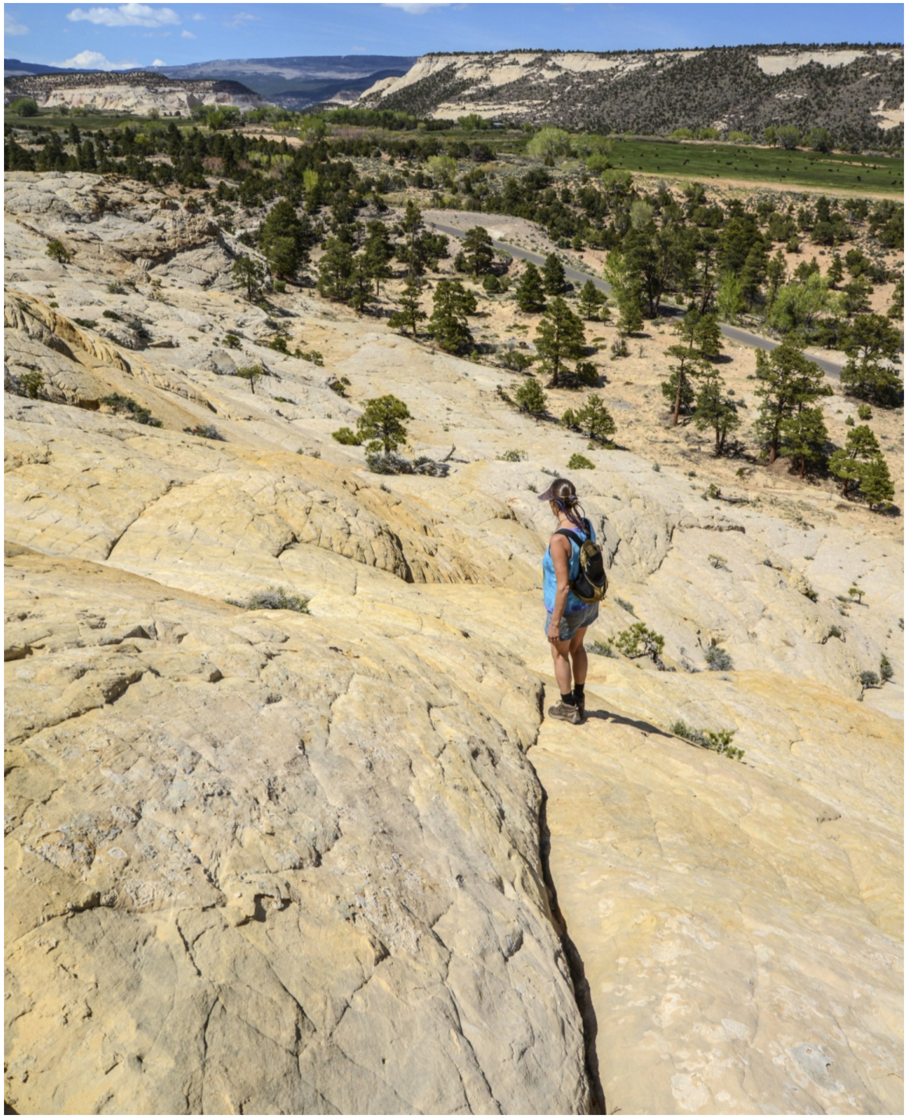
	% Active in Each Type	Average Spend	Average Age
Family/Friend/ Reunions	45%	$482	41
Entertainment/ Amusement	27%	$686	43
Sightseeing	23%	$672	45
Art/Culture/History	22%	$656	45
Nature/Outdoors	19%	$737	43
Parks/Gardens	18%	$794	44
Adventure Sports	16%	$831	39
Sports/Recreation	15%	$529	38

*Note: Visitors can participate in multiple activities (or none).

***See glossary for activities describing each niche (slide 65)**

3
Detailed Results

4
Share of Visitors



Share of visitors, both person-trips and households

(trips = 50+ miles from home (one-way) or spent 1+ nights in CY 2013)

Market Overview:

- Utah visitors make up 1% of total US travel
- Another viewpoint shows "visitors vs. residents." Since visitors arrive from all parts of the US, this shows the collective impact of all US visitors to Utah (not just in-state residents). Hosting over 14 million total visitors, tourism and business travel provide substantial revenue to UT.

Visitation – % of Person-Trips: Seven States

Person-Trips Total:
US = 1,185,241,000
UT = 14,499,000

Travel and Tourism Impact

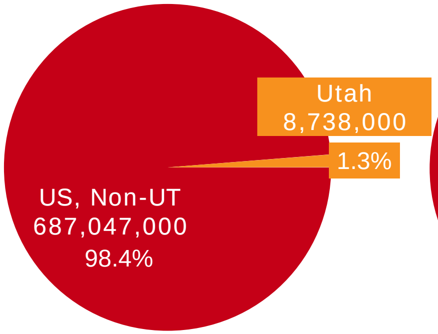
State	Population - Census (2013 estimate)	Number of US Visitors to Utah
Utah	2,900,872	14,499,000

Market by HH:

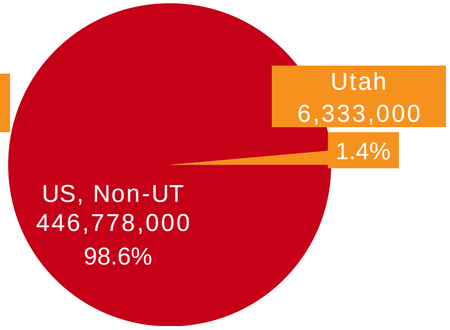
- Travelers from almost 9 million households visited Utah in CY 2013 (includes in-state visitors)
- Overnight trips make up almost three-quarters (72%) of Utah trips, somewhat more than the US overall (65%).

Visitation – All Trips by Households

All Trips (Day + Overnight)
695,785,000



Overnight Trips Only
453,111,000



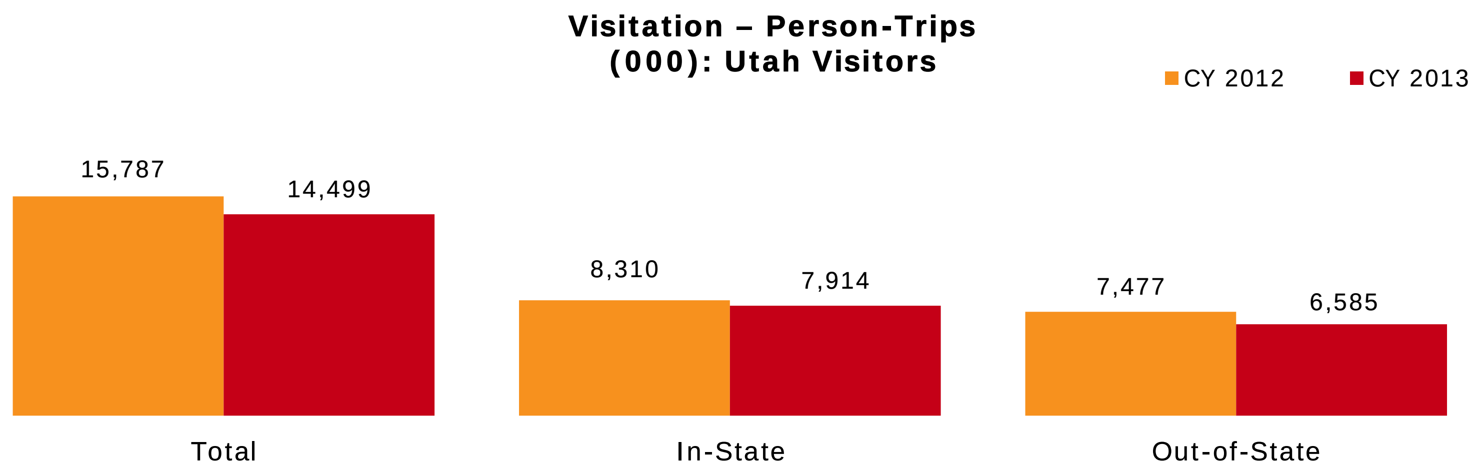
80% of Utah's total overnights are for leisure (20% for business, personal business, other)

Q4a. Please indicate US state(s) visited; Q4e. Day or Overnight; Q3b for households (projected)

Person-trips by residence and purpose

(trips = 50+ miles from home (one-way) or spent 1+ nights in CY 2013)

Visitor volume dips slightly, from both residents and out-of-state visitors, but with almost no change in the proportion by purpose (business vs. leisure).



	Total CY 2012	Total CY 2013	In-State CY 2012	In-State CY 2013	Out-of-State CY 2012	Out-of-State CY 2013
Leisure:	13,353 (85%)	12,279 (85%)	7,177 (86%)	6,934 (88%)	6,176 (83%)	5,345 (81%)
Business:	996 (6%)	970 (7%)	321 (4%)	362 (5%)	676 (9%)	608 (9%)
Unclassified:	1,438 (9%)	1250 (9%)	812 (10%)	618 (8%)	625 (8%)	632 (10%)

Q4a. Please indicate US state(s) visited

Note 1: A rather small business sample (79 in-state; 99 out-of-state) contributes to volatility
Note 2: Several options added to business/leisure selections in CY 2013 also alters responses

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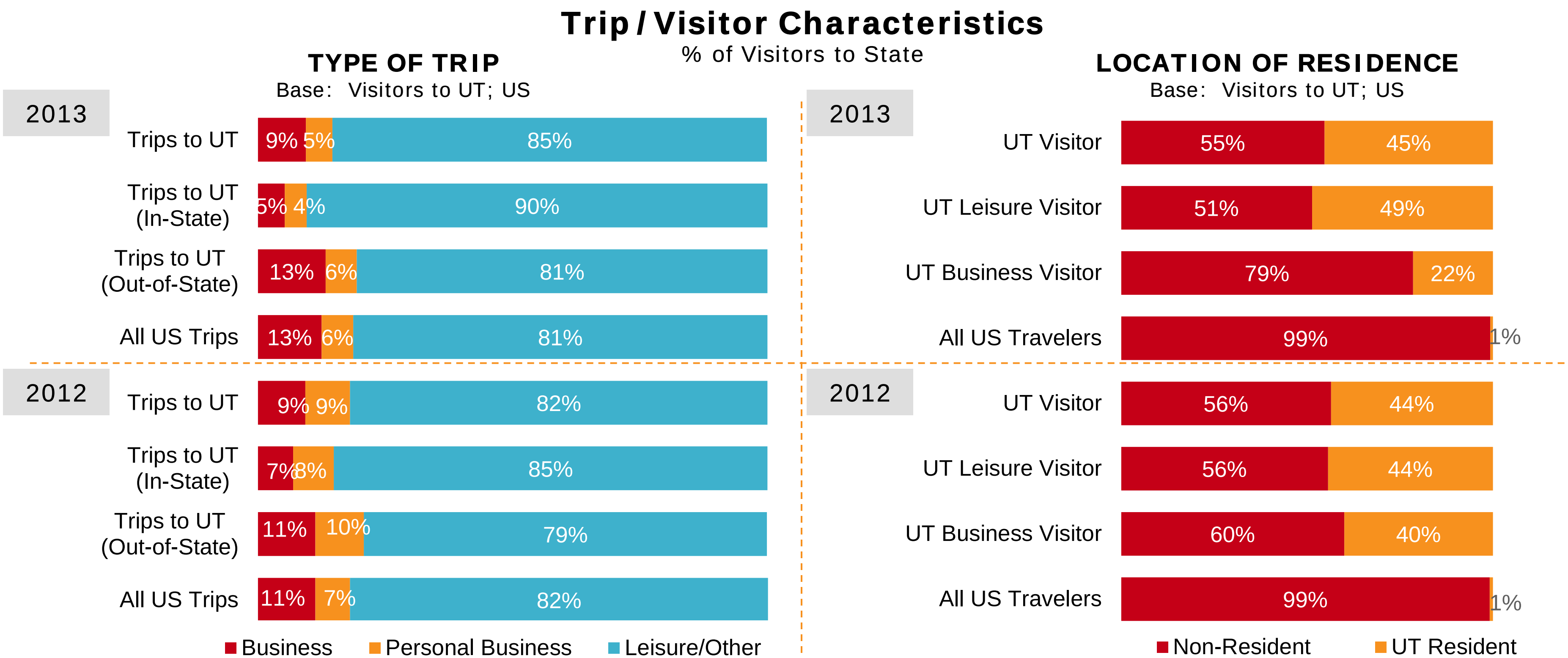
Trip Purpose/Source of Visits/Timing

Trip purpose/visitor source

Overall:

- Most visitors travel to Utah for leisure, but a notable share (9%) travels on business
- Utah residents make up half (49%) of all leisure visits but only a fifth of business travel.



Q1b. Which of the following was the PRIMARY purpose of trip to . . .
(Household Trip Level – demo wtd)

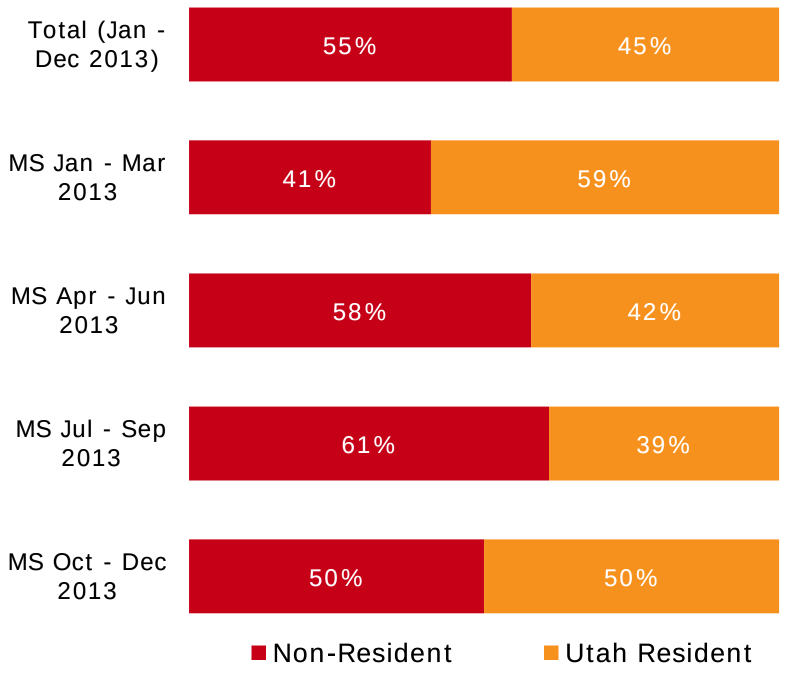
Panel: Residence of visitors (Household Level)

Visitor source by quarter

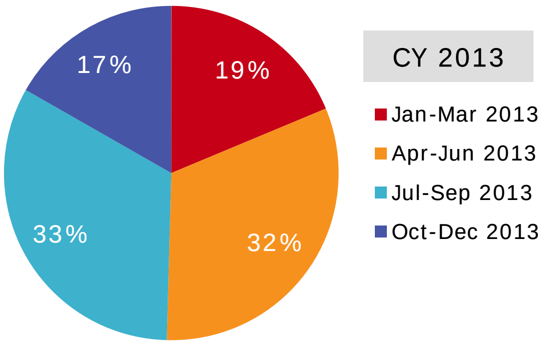
- Generally, just under half of Utah visitors live in-state, but they account for a larger share during the off-season winter months (January – March).

SOURCE of Utah VISITORS by QUARTER

Base: Utah Visitors



Panel: State/DMA residence of those who visited Utah (Household Level)



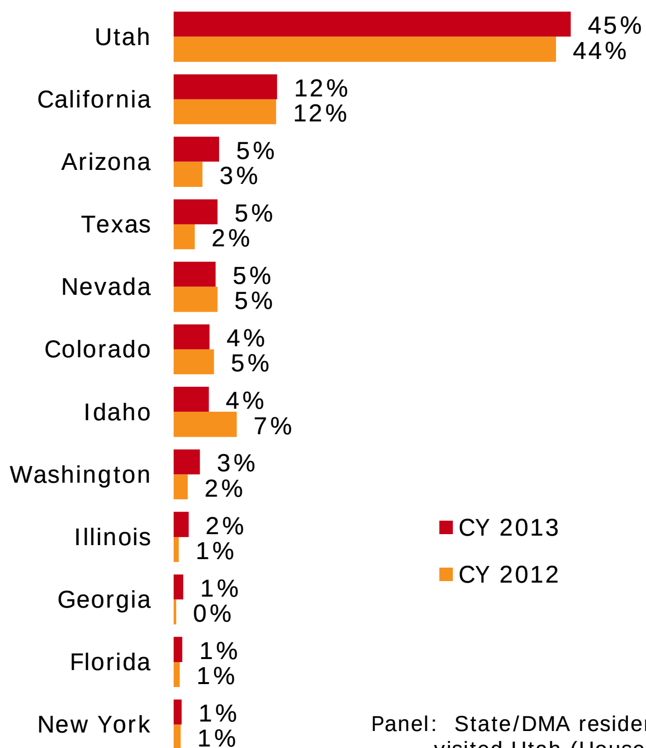
Q4a. Please indicate the US state(s) visited . . . (Person Trips Projected at Trip Level)

Visitor source by state/DMA

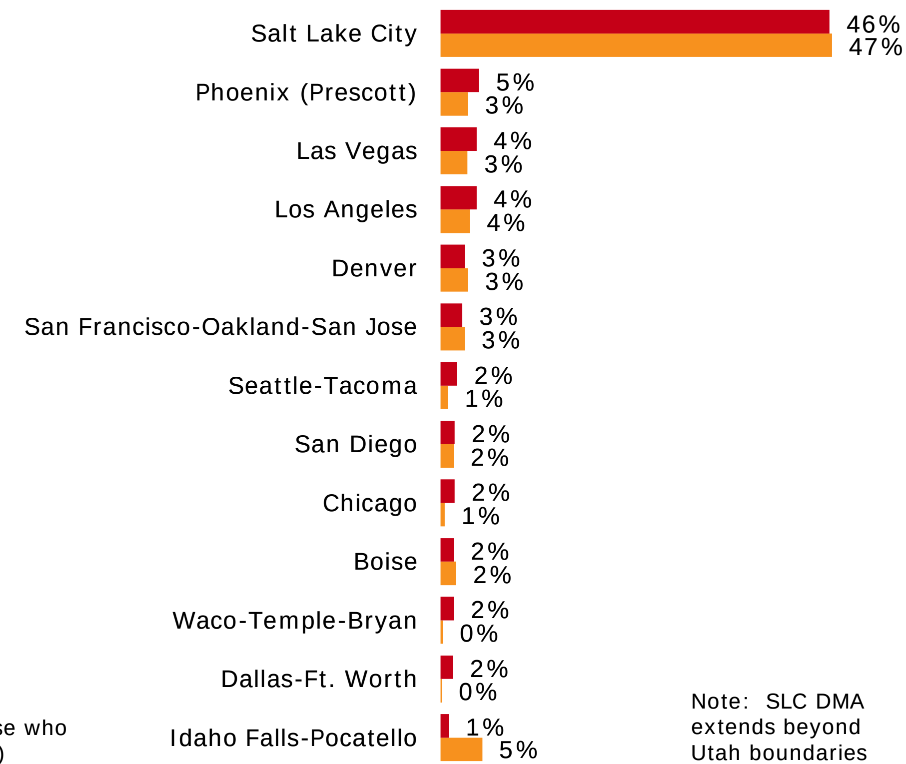
Proximity counts:

- Surrounded by relatively sparsely populated states, Utah, rather unusually, attracts a large share of out-of-state visitors from non-border states (notably, California and Texas).
- Western DMAs provide most visitors.

Source of Visitors: Top States (1.9%+)
Base: Visited Utah
% of Visitors Residing in . . . (CY 2013)



Source of Visitors: Top DMAs (1.7%+)
Base: Visited Utah
% of Visitors Residing in . . . (CY 2013)



Panel: State/DMA residence of those who visited Utah (Household Level)

Note: SLC DMA extends beyond Utah boundaries

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Planning and Booking

Trip planning

Logical patterns occur for trip planning:

- With fewer travel considerations (such as lodging, number of meals, transportation logistics), day-trip visitors and in-state visitors spend much less time planning and deciding on a Utah trip
- Roughly a quarter (26%) of Utah visitors plan a trip within a couple of weeks, but since many visitors travel from non-adjacent states, the level places below US travelers overall.

Trip Planning (Time Before Visit)	All US Travelers (All Trips) CY 2013	UT Visitors Total CY 2012	UT Visitors Total CY 2013	UT Visitors Leisure O/N* CY 2013	UT Visitors Leisure Day Trip CY 2013	UT In-State Visitors CY 2013	UT Out-of-State Visitors CY 2013	UT In-State O/N Leisure Visitors CY 2013	UT Out-of-State O/N Leisure Visitors CY 2013
Considered									
Within Two Weeks	34%	25%	26%	19%	48%	42%	17%	33%	13%
2 – 4 Weeks	16	16	13	14	9	13	12	15	14
1 – 3 Months	19	16	18	17	20	22	15	23	14
3+ Months	32	44	43	50	23	23	56	29	59
Decided									
Within Two Weeks	42%	33%	32%	25%	55%	49%	22%	40%	18%
2 – 4 Weeks	17	17	16	18	13	18	15	22	17
1 – 3 Months	18	16	19	18	17	16	21	17	19
3+ Months	24	35	33	39	16	18	42	22	47

*O/N = Overnight

Q4i. Please indicate how far in advance you considered traveling to . . . // Decided to visit . . . (State Level-demo wtd)

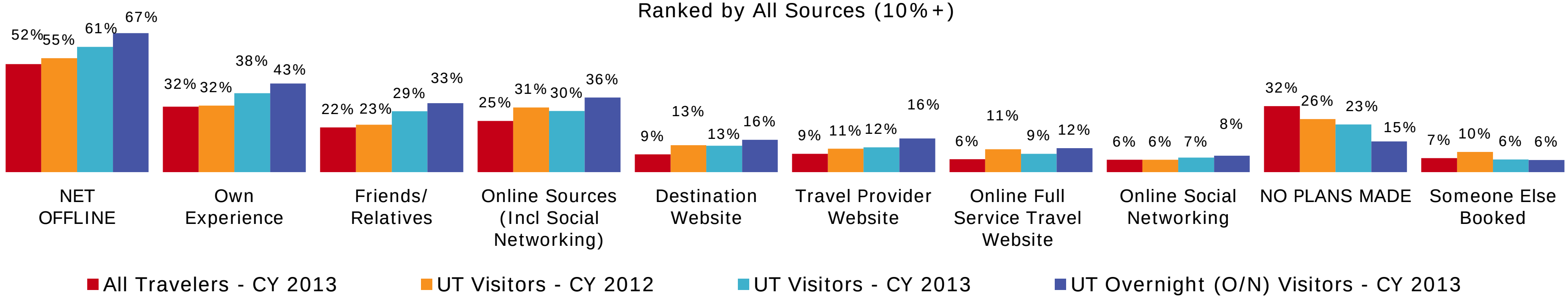
Trip planning

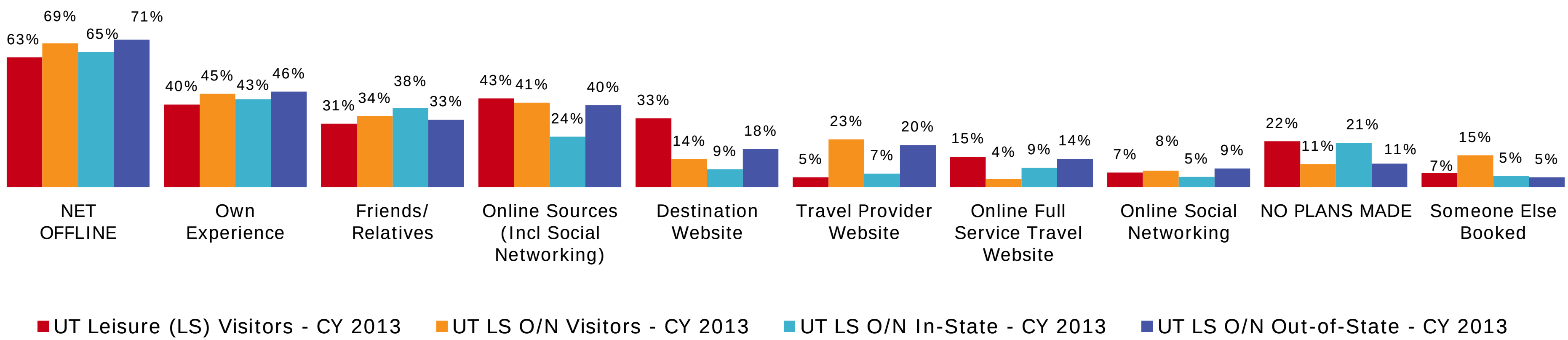
To encourage visits, destinations must provide potential travelers with relevant information:

- Generally, Utah visitors use similar information sources as other travelers – just more so
- Differences appear by residence, with proportionately fewer in-state visitors using online resources (social media included) while more out-of-state visitors search for information online.

Information Sources to Plan a Trip

Ranked by All Sources (10%+)





Q4j. What sources did you use in planning your trip to . . . (State Level – demo wtd)

Note: Social/Comm'l Network = Facebook, LinkedIn, Twitter, etc.

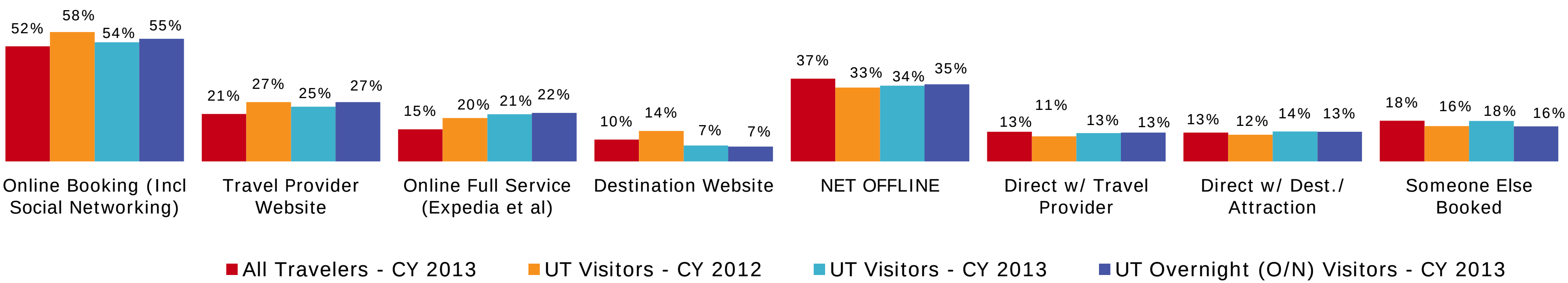
LS = Leisure
O/N = Overnight

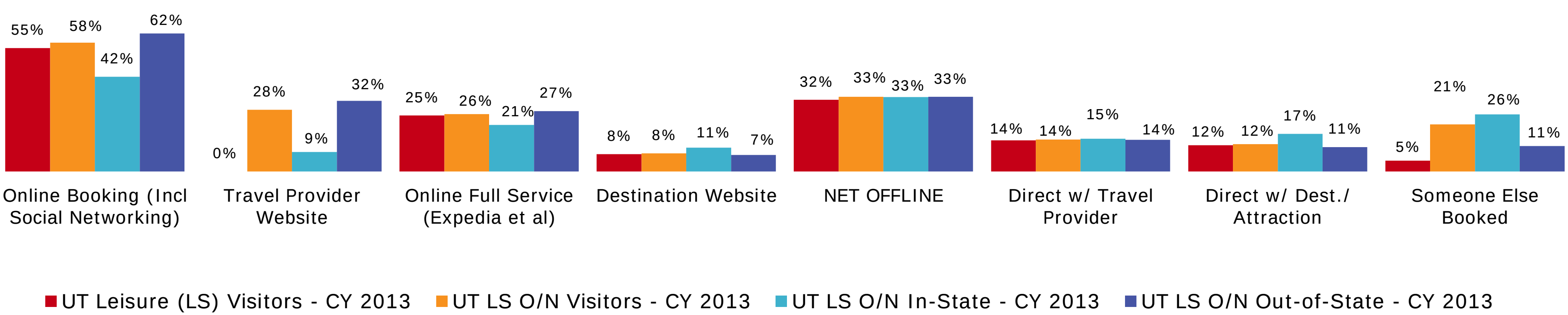
Trip booking

- Most differences in booking channels occur by residence. Proportionately more in-staters book directly with the destination/attraction or visit a destination website; out-of-staters more likely use online travel providers or online full service agencies.

Method Used to Book Trip Components

Ranked by All Sources (10%+)





Q4k. Please indicate the method(s) you used to book your trip . . . (State Level – demo wtd)

Note: LS = Leisure O/N = Overnight

7
Trip Characteristics

Trip characteristics: visitor choices

Most (80%) visitors come to Utah to play, most commonly to visit friends/relatives (41%):

- Slightly fewer drive than for US destinations overall, with one in five out-of-staters flying
- Still only a comparatively small share of nights, many more camp in this outdoorsy state than visitors elsewhere.

Trip Choices (Trip Level)	All US Travelers CY 2013	UT Visitors Total	UT Visitors Overnight (O/N) Leisure (LS)	UT Visitors Day Trip Leisure (LS)	Utah Visitors In-State	Utah Visitors Out-of-State	Utah Visitors In-State LS O/N	Utah Visitors Out-of-State LS O/N
PRIMARY TRIP PURPOSE								
NET Leisure	74%	80%	100%	100%	86%	75%	100%	100%
Visit Friends/Relatives	41	41	52	48	44	38	55	53
Entertainment/Sightsee	11	11	11	23	12	11	4	14
Outdoor Recreation	6	13	17	14	14	12	17	15
Business	13	9	-	-	5	13	-	-
Personal Business/Other	14	10	0	-	9	12	-	-
PRIMARY MODE								
% Own Auto/Truck	77%	74%	75%	91%	89%	61%	93%	63%
% Air Travel	13	13	12	0	1	25	1	20

Lodging (State Level)	All US Travelers CY 2013	UT Visitors Total	UT Visitors Overnight (O/N) Leisure (LS)	UT Visitors Day Trip Leisure (LS)	Utah Visitors In-State	Utah Visitors Out-of-State	Utah Visitors In-State LS O/N	Utah Visitors Out-of-State LS O/N
AVG # NIGHTS (if any)	3.5	3.5	3.5	-	2.3	4.2	2.4	4.4
Private Home	1.5	1.4	1.6	-	1.1	1.6	1.1	1.9
Hotel/Motel	1.2	1.2	1.0	-	0.6	1.6	0.5	1.4
RV/Tent	0.1	0.3	0.3		0.2	0.4	0.2	0.4
All Other	0.7	0.6	0.6	-	0.4	0.6	0.6	0.7

Q1b: Which was the primary purpose of trip? Q2b: Which was the primary mode of transportation? (Trip Level – demo wtd)
Q4f: Please specify the number of nights stayed at each listed accommodation. (State Level – demo wtd)

Trip characteristics: visitor choices by state

Utah visitors, even more than those to competitive states, come for pleasure:

- Utah draws about twice as many for outdoor recreation as the US overall, but trails Colorado and Montana
- The proportion that drives places near the center of competitors
- Most states' visitors stay roughly 3½ to 4 nights.

Trip Choices (Trip Level)	All US Travelers CY 2013	Visit UT
PRIMARY TRIP PURPOSE		
NET Leisure	74%	80%
Visit Friends/Relatives	41	41
Entertainment/Sightsee	11	11
Outdoor Recreation	6	13
Business	13	9
Personal Business/Other	14	10
PRIMARY MODE		
% Own Auto/Truck	77%	74%
% Air Travel	13	13

Lodging (State Level)	All US Trips CY 2013	Visit UT
AVG # NIGHTS (if any)	3.5	3.5
Private Home	1.5	1.4
Hotel/Motel	1.2	1.2
RV/Tent	0.1	0.3
All Other	0.7	0.6

Trip characteristics: travel party

Utah visitors travel in somewhat larger groups than other US travelers:

- Twice as many Utah residents travel with children than non-UT residents
- Fall travel parties (off-season) note the fewest children.

Trip Characteristics (Trip Level)	All US Travel-ers CY 2013	UT Visitors Total	UT Visitors for Busi-ness	UT Visitors for Leisure (LS)	UT Visitors Over-night (O/N) LS	UT Visitors In-State	UT Visitors Out-of-State	UT Visitors In-State O/N LS	UT Visitors Out-of-State O/N LS
AVG IN TRAVEL PARTY	2.7	3.2	2.6	3.4	3.3	3.7	2.7	3.8	2.9
% Travel in Pairs	39%	34%	26%	33%	34%	26%	42%	24%	42%
% Travel w/ Children	24	43	29	46	46	58	29	67	33
Avg # Kids Inc. 0	0.5	0.9	0.5	1.0	1.0	1.3	0.6	1.5	0.7
Avg # Kids Exc. 0	2.0	2.1	1.9	2.2	2.2	2.2	2.0	2.2	2.2

Trip Characteristics (Trip Level)	All Utah Visitors	Q1 Jan – Mar 2013	Q2 Apr – Jun 2013	Q3 Jul – Sep 2013	Q4 Oct – Dec 2013
AVERAGE # IN TRAVEL PARTY (Q3a)	3.2	3.2	3.3	3.4	2.7
% Travel in Pairs	34%	32%	37%	32%	36%
% Traveling with Children	43	50	42	48	31
Avg. # of Children on Trip Inc. Zero	0.9	1.1	1.0	1.0	0.6
Avg. # of Children on Trip Exc. Zero	2.1	2.2	2.4	2.1	1.8

Q3a: Please indicate number of travel party members (including yourself) under 18 and 18+. (Trip Level-demo wtd)

Trip characteristics: travel party by state

- Utah visitors least often claim to travel with just one other person than visitors to other states and most often mention children.

Trip Characteristics (Trip Level)	All US Travelers CY 2013	Visit UT
AVERAGE # IN TRAVEL PARTY	2.7	3.2
% Travel in Pairs	39%	34%
% Traveling with Children	24	43
Avg. # of Children on Trip Inc. 0	0.5	0.9
Avg. # of Children on Trip Exc. 0	2.0	2.1

Q3a: Please indicate number of travel party members (including yourself) under 18 and 18+. (Trip Level-demo wtd)

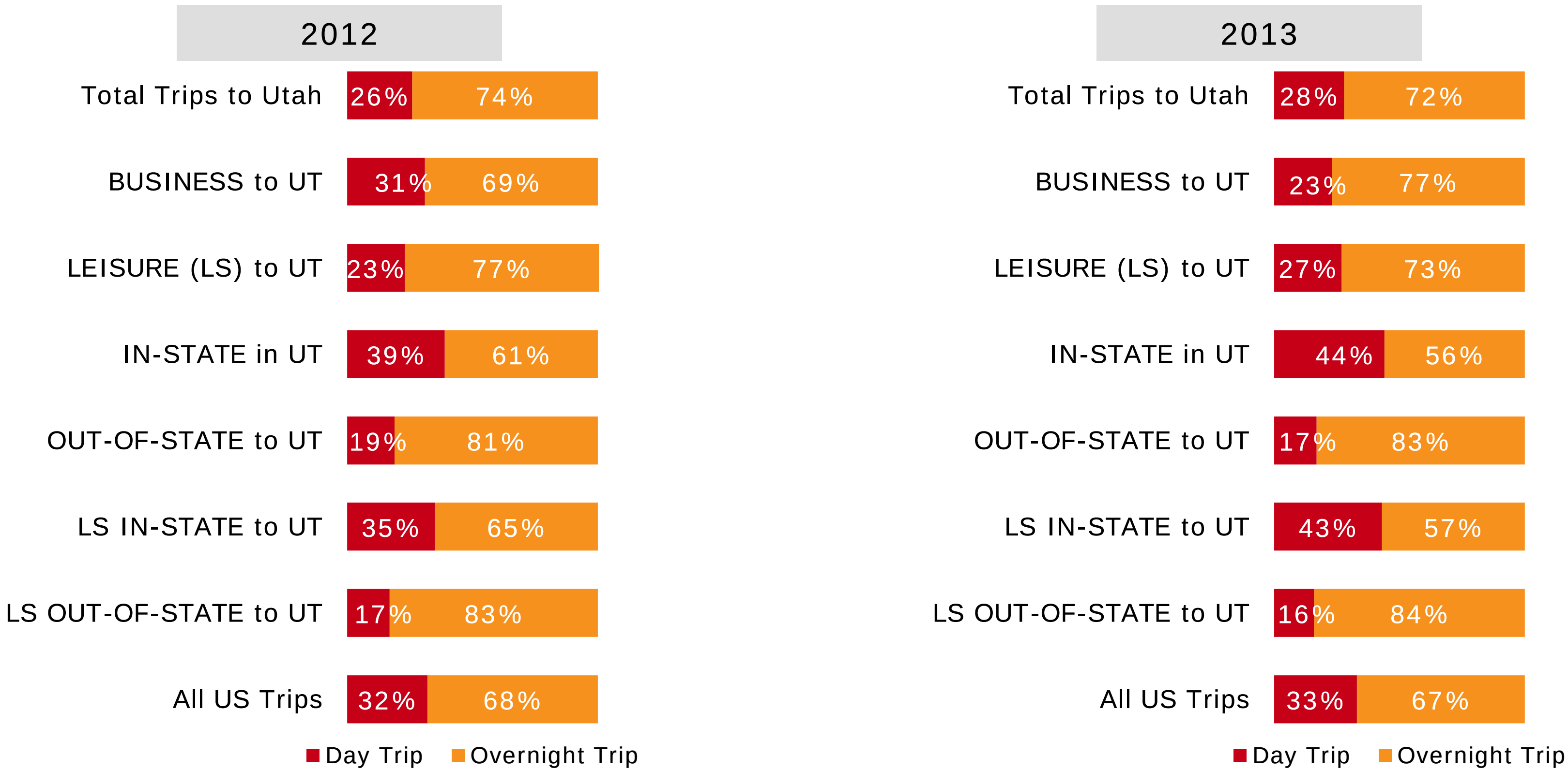
Trip characteristics: day/overnight

More often than for the total US, almost three-quarters of trips to Utah include an overnight stay (72%), with non-UT residents much more likely to spend nights (and $$$) than those living in-state.

(*Note: personal business and other are not classified as either business or leisure trips*).

% DAY/OVERNIGHT TRIPS

Base: Trips to State; Total US



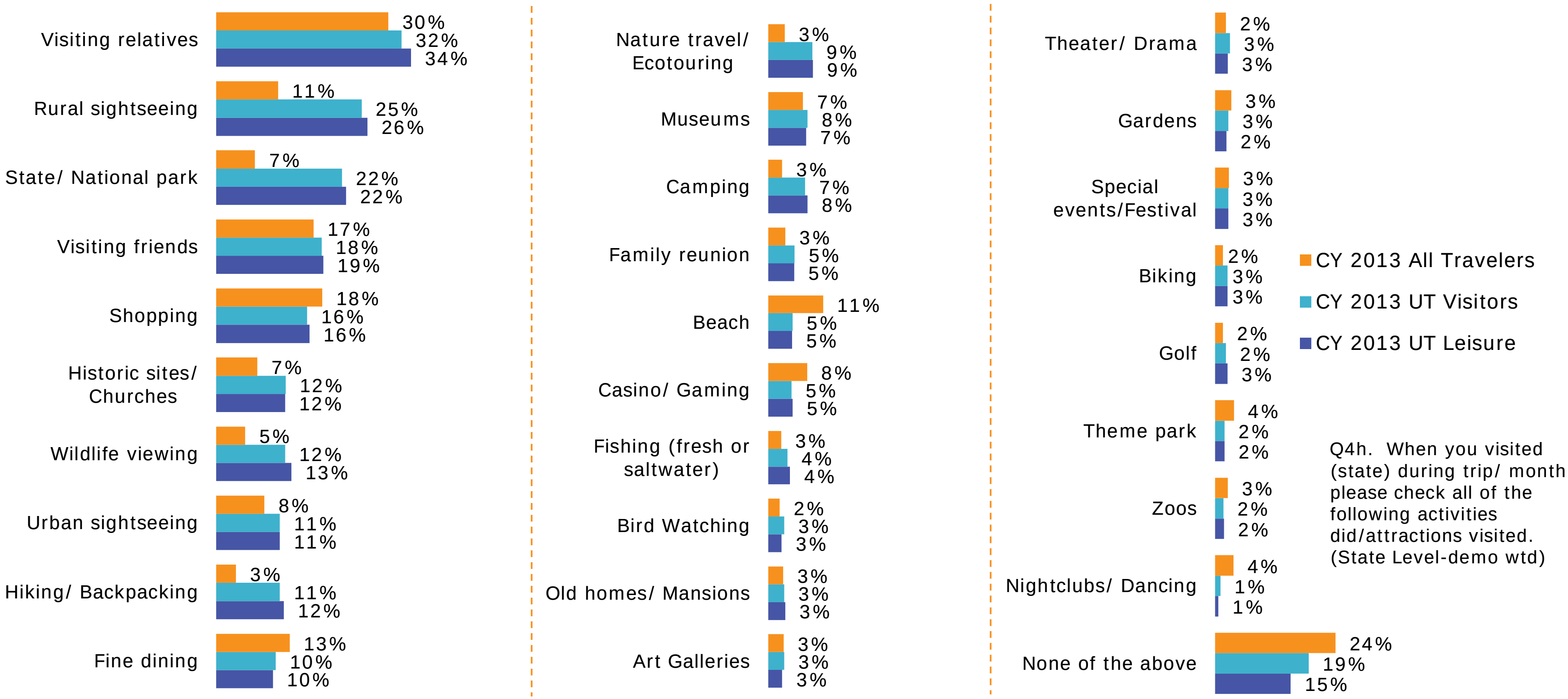
Q4e. Please specify which visits included at least one overnight stay . . . (State/Area Level-demo wtd)

Trip characteristics: vacation activities/attractions

Utah visitors tend to rank leading activities differently than total US travelers, with a much stronger emphasis on outdoor features: *sightseeing, parks*, *historic sites/churches, wildlife viewing, hiking/backpacking, ecotouring,* and *camping* and less on *fine dining, beaches*, and *gaming*.

CY 2013 % Activities Participated / Attractions

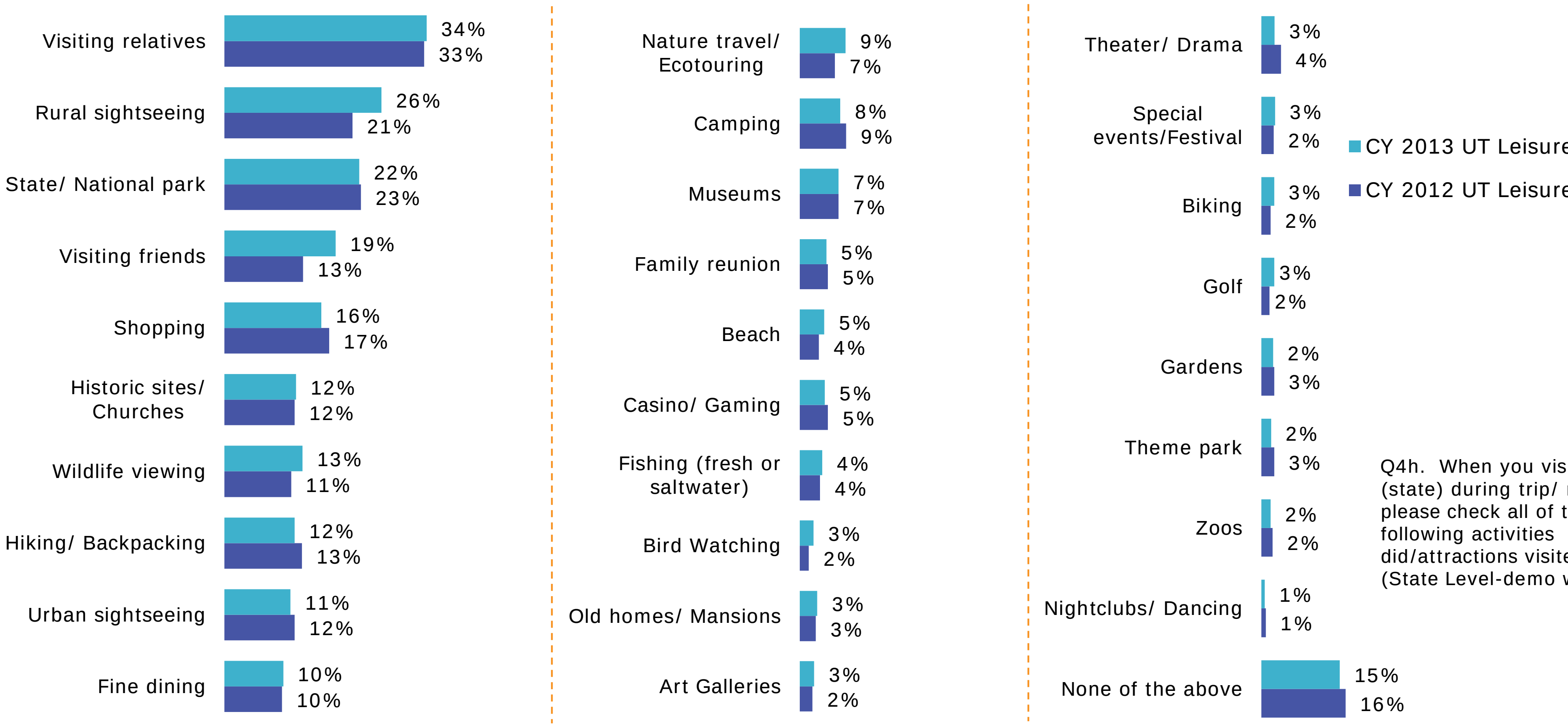
Ranked by 2013 Utah Visitors (Activities with <3% for Utah not shown)



Trip characteristics: vacation activities/attractions

Only minor changes appear since last year, with a bit more interest in *rural sightseeing* and *family/friends.*

Trend: % Activities Participated / Attractions by Utah Leisure Visitors
Ranked by 2013 Total Utah Visitors

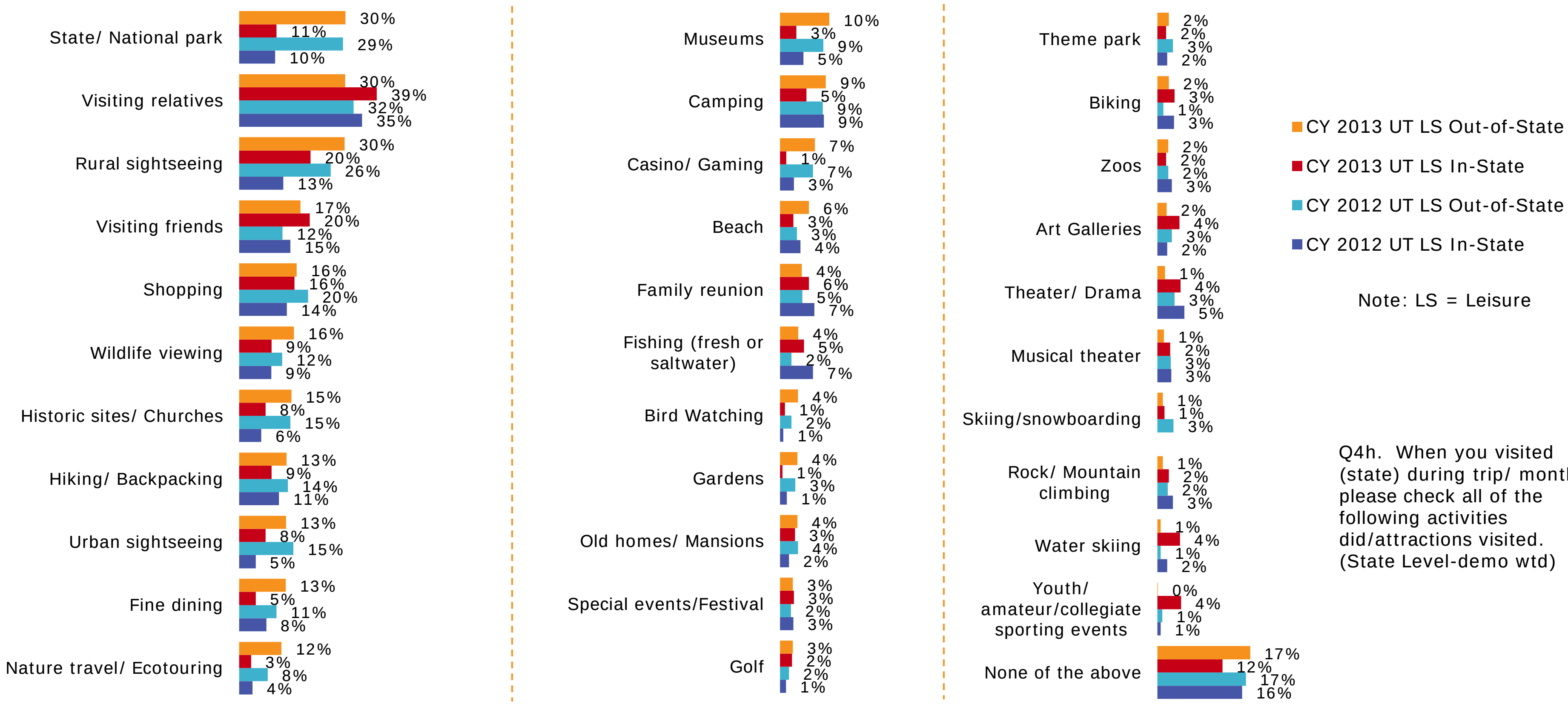


Q4h. When you visited (state) during trip/ month, please check all of the following activities did/attractions visited. (State Level-demo wtd)

Trip characteristics: vacation activities/attractions

Out-of-state visitors take greater advantage of most Utah features, especially outdoor activities and attractions (*parks, sightseeing*, etc.).

Activities Participated / Attractions Visited by Leisure Visitors
% Participated/Visited – Ranked by 2013 Utah Out-of-State Visitors



Q4h. When you visited (state) during trip/ month, please check all of the following activities did/attractions visited. (State Level-demo wtd)

Trip characteristics: leisure vs. business visitor

Compared to business travelers, leisure travelers more often: Drive, travel with others, and stay in accommodations other than a hotel/motel. Compared to last year, a shift occurs from private homes to more nights in hotels/motels.

UTAH VISITORS Trip Choices (Trip Level)	Total UT 2012	Total UT 2013	Leisure 2013	Business 2013	Day Trip 2013	Overnight 2013
PRIMARY TRIP PURPOSE						
NET Leisure/Personal	80%	80%	100%	-	81%	80%
Visit Friends/Relatives	43	41	51	-	39	42
Entertainment/Sightsee	12	11	14	-	19	9
Outdoor Recreation	12	13	16	-	12	14
Business	9	9	-	100	4	11
Personal Bs/Other	11	10	-	-	15	9
PRIMARY MODE						
% Own Auto/Truck*	73%	74%	79%	38%	89%	70%
% Air Travel	15	13	9	45	0	17
AVG # IN TRAVEL PARTY	3.3	3.2	3.4	2.6	3.3	3.2
% Traveling Solo	19%	16%	13%	45%	10%	18%
% Traveling With Children	37	43	46	29	46	42

UTAH VISITORS Lodging (State Level)	Total UT 2012	Total UT 2013	Leisure 2013	Business 2013	Day Trip 2013	Overnight 2013
AVG # NIGHTS (if any)	3.5	3.5	3.5	3.0	-	3.5
Private Home	1.7	1.4	1.6	0.6	-	1.4
Hotel/Motel	0.9	1.2	1.0	2.2	-	1.2
RV/Tent	0.4	0.3	0.3	0.1		0.3
All Other	0.5	0.6	0.6	0.1	-	0.6

*Auto/Truck only; does not include camper/RV, bus, train, motorcycle, or other

Q1b: Which was the primary purpose of trip?

Q2b: Which was the primary mode of transportation?

Q3a: Please indicate number of travel party members (including yourself) under 18 and 18+. (Trip Level – demo wtd)

Q4f: Please specify the number of nights stayed at each listed accommodation (State Level – demo wtd).

Trip characteristics: leisure vs. business visitor

Leisure travel dominates both in-state and out-of-state trips, but non-UT residents somewhat more likely cite business. Those traveling from outside Utah generally stay longer, buy more hotel/motel nights, and less likely have a companion – whether business or leisure travel.

UTAH VISITORS CY 2013 Trip Choices (Trip Level)	Utah In-State	Utah Out-State	Business In-State	Business Out-State	LS O/N In-State	LS O/N Out-State
PRIMARY TRIP PURPOSE						
NET Leisure/Personal	86%	75%	-	-	100%	100%
Visit Friends/Relatives	44	38	-	-	55	53
Entertainment/Sightsee	12	11	-	-	4	14
Outdoor Recreation	14	12	-	-	17	15
Business	5	13	100	100	-	-
Personal Bs/Other	9	12	-	-	-	-
PRIMARY MODE						
% Own Auto/Truck*	89%	61%	75%	25%	93%	63%
% Air Travel	1	25	-	62	1	20
AVG # IN TRAVEL PARTY	3.7	2.7	4.8	1.8	3.8	2.9
% Traveling Solo	12%	20%	23%	53%	12%	17%
% Traveling With Children	58	29	58	17	67	33

UTAH VISITORS CY 2013 Lodging (State Level)	Utah In-State	Utah Out-State	Business In-State	Business Out-State	LS O/N In-State	LS O/N Out-State
AVG # NIGHTS (if any)	2.3	4.2	2.9	3.1	2.4	4.4
Private Home	1.1	1.6	0.3	0.6	1.1	1.9
Hotel/Motel	0.6	1.6	2.0	2.3	0.5	1.4
RV/Tent	0.2	0.4	0.0	0.1	0.2	0.4
All Other	0.4	0.6	0.6	0.1	0.6	0.7

*Auto/Truck only; does not include camper/RV, bus, train, motorcycle, or other

LS=Leisure
O/N = Overnight

Q1b: Which was the primary purpose of trip?

Q2b: Which was the primary mode of transportation?

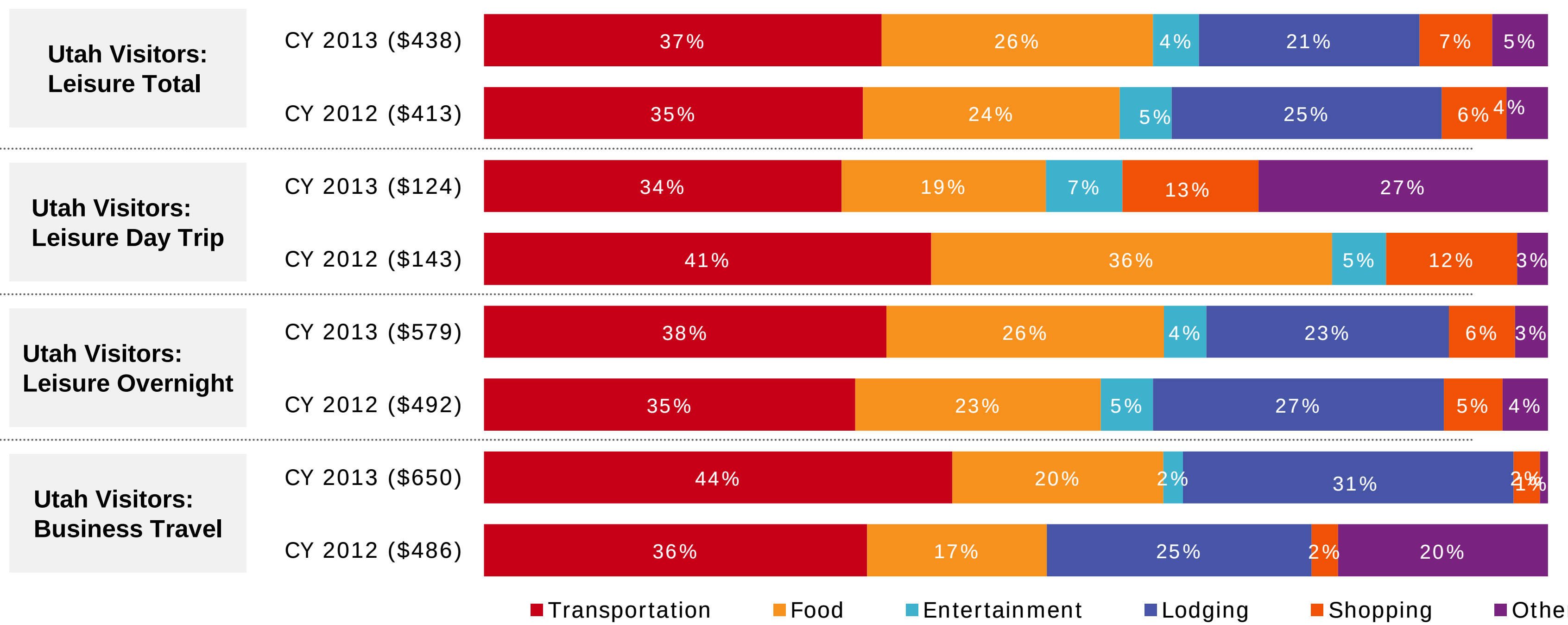
Q3a: Please indicate number of travel party members (including yourself) under 18 and 18+. (Trip Level – demo wtd)

Q4f: Please specify the number of nights stayed at each listed accommodation (State Level – demo wtd).

Trip characteristics: spending by type of travel

Leisure visitor spending slips from last year, primarily among day-trippers. By category (transportation, food, etc.), spending proportions generally mirror last year except for unspecified spending (a jump by day-trippers and a drop by business travelers).

Average Spending in Utah by Trip Type
Total Spending by Travel Party (Total Spending, including 0)

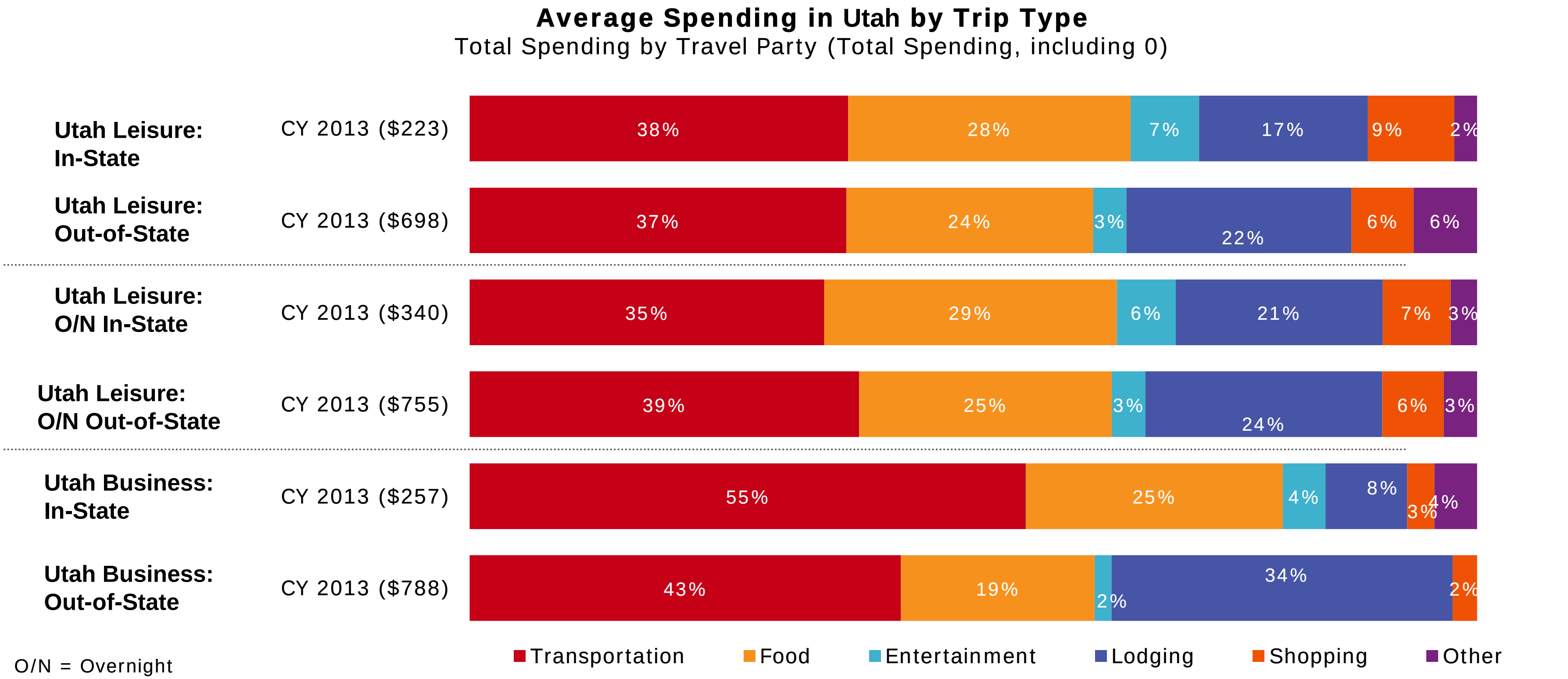


Note: Transportation includes parking/tolls. Food includes food/beverage/dining/groceries. Other includes amenities/other.

Q4g. Please indicate the total dollar amount spent by your travel party (all) in Utah for . . . (State Level-demo wtd)

Trip characteristics: spending by type of travel

The spending gap between in-state and out-of-state visitors (who are much more likely to stay overnight) illustrate the value of luring them to the state. Out-of-state visitors spend two to three times as much.

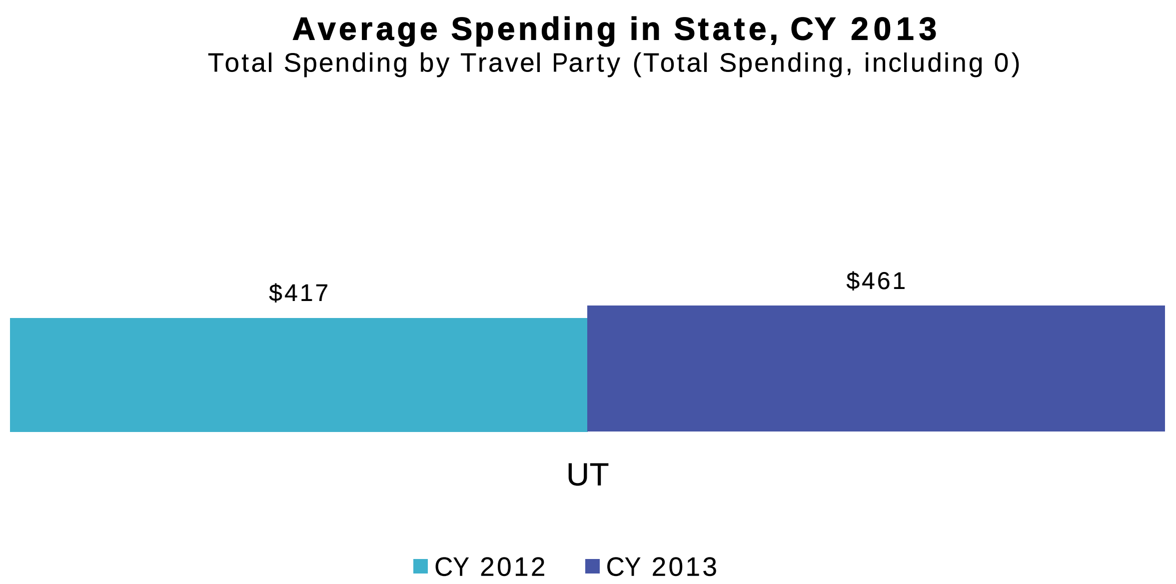


Note: Transportation includes parking/tolls. Food includes food/beverage/dining/groceries. Other includes amenities/other.

Q4g. Please indicate the total dollar amount spent by your travel party (all) in Utah for . . . (State Level-demo wtd)

Trip characteristics: competitive state spending

Utah visitors tend to spend about the same as those going to Idaho, Wyoming, and Montana. With more urban activities available, visitors to Colorado, Arizona, and especially Nevada (with its gaming) spend more.



Q4g. Please indicate the total dollar amount spent by your travel party (all) in (State) for . . . (State Level-demo wtd)
(Includes those not specifying leisure vs. business trips)

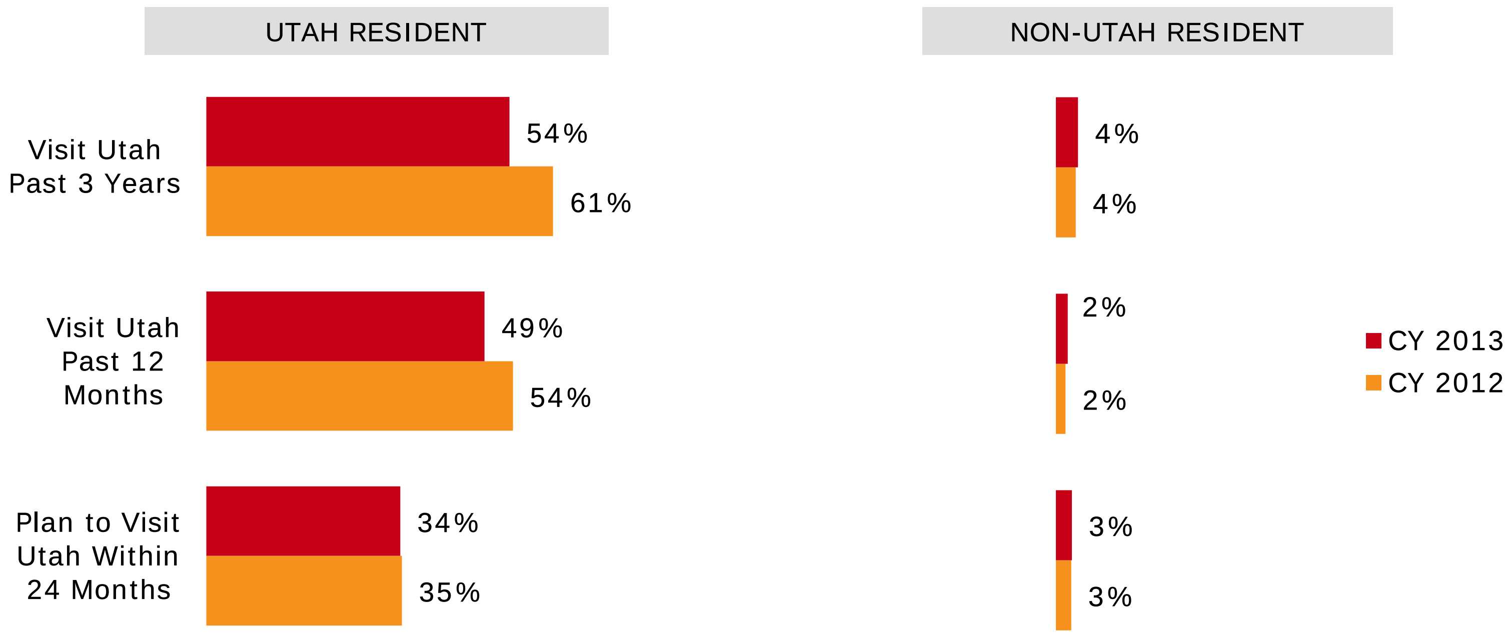
8
Competitive Environment

Destinations: Utah visitation

Typical of most state destinations, Utah draws a large share of visitors from its residents:

- Over half of in-state travelers vacationed in Utah within the past three years
- A third of in-state travelers place Utah on their near-term future itinerary
- Non-resident visitation to Utah remains very consistent
- However, Utah may need to more strongly promote to residents since fewer visited in 2013 than in 2012.

Visitation Patterns for Utah – Household Level, All Travelers



Q7a: Please indicate US states visited for leisure in past three years.
Q7b. Please indicate states visited within the past 12 months.
Q7c: Which US states plan to visit within the next two years for leisure? (Household Level)

Destinations: top areas in Utah by residence

Residents and non-residents of Utah choose similar destinations, although residents place less emphasis on Salt Lake City.

Top Utah Destinations - TOTAL

% Utah Visitors Selecting Area (ranked by CY 2013)

All Utah Visitors	CY 2012	CY 2013	Utah Residents	CY 2012	CY 2013	Non-Utah Residents	CY 2012	CY 2013
Salt Lake City	38%	40%	Salt Lake City	22%	27%	Salt Lake City	52%	53%
Provo/Orem	15%	17%	St. George	17%	19%	Provo/Orem	13%	18%
St. George	15%	15%	Provo/Orem	17%	15%	St. George	13%	11%
Logan	10%	10%	Logan	13%	13%	Ogden	7%	10%
Ogden	9%	10%	Ogden	11%	10%	Park City	12%	10%
Park City	8%	9%	Park City	5%	9%	Moab	8%	9%
Cedar City	5%	6%	Cedar City	6%	7%	Zion	8%	8%
Moab	5%	6%	Moab	2%	3%	Logan	7%	8%
Zion	6%	5%	Zion	5%	2%	Cedar City	5%	5%

Note: Respondents may select more than one destination (percentages may sum to more than 100%); not all destinations are listed
Q4d. Please indicate the cities/places visited in state . . . (State Level – demo wtd.)

Destinations: top areas in state

Each state has a key city or two that attract the most visitors:

- Utah: Salt Lake City

Top Destinations by State

% Visitors Selecting Area (Each State Ranked)

UT Visitors	CY 2013						
SLC	40%						
Provo/Orem	17%						
St. George	15%						
Logan	10%						
Ogden	10%						
Park City	9%						
Cedar City	6%						
Moab	6%						
Zion	5%						

Note: Respondents may select more than one destination (percentages may sum to more than 100%); not all destinations are listed

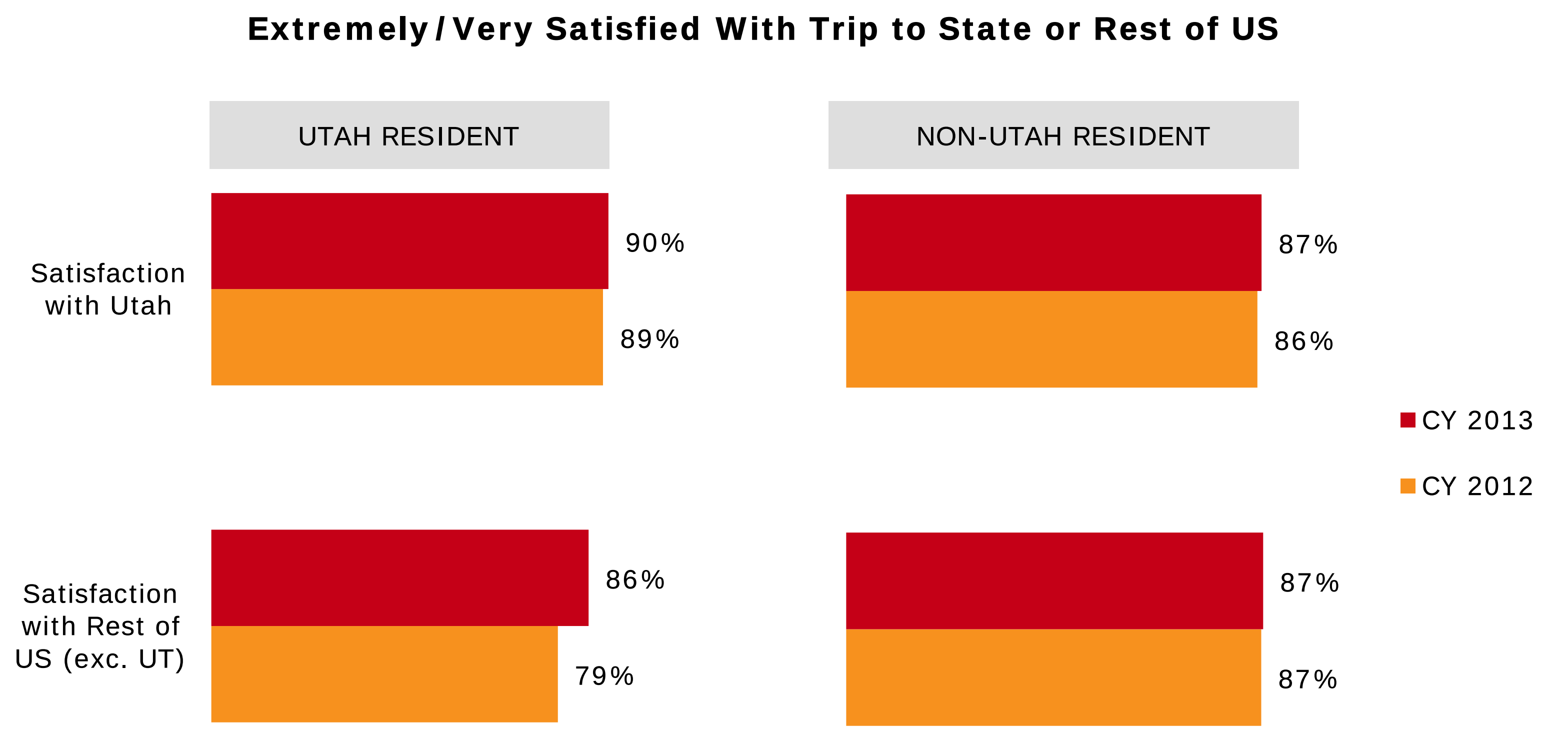
Q4d. Please indicate the cities/places visited in state . . . (State Level – demo wtd.)

*Minden/Gardnerville

9
Satisfaction

Satisfaction: Utah vs. rest of US

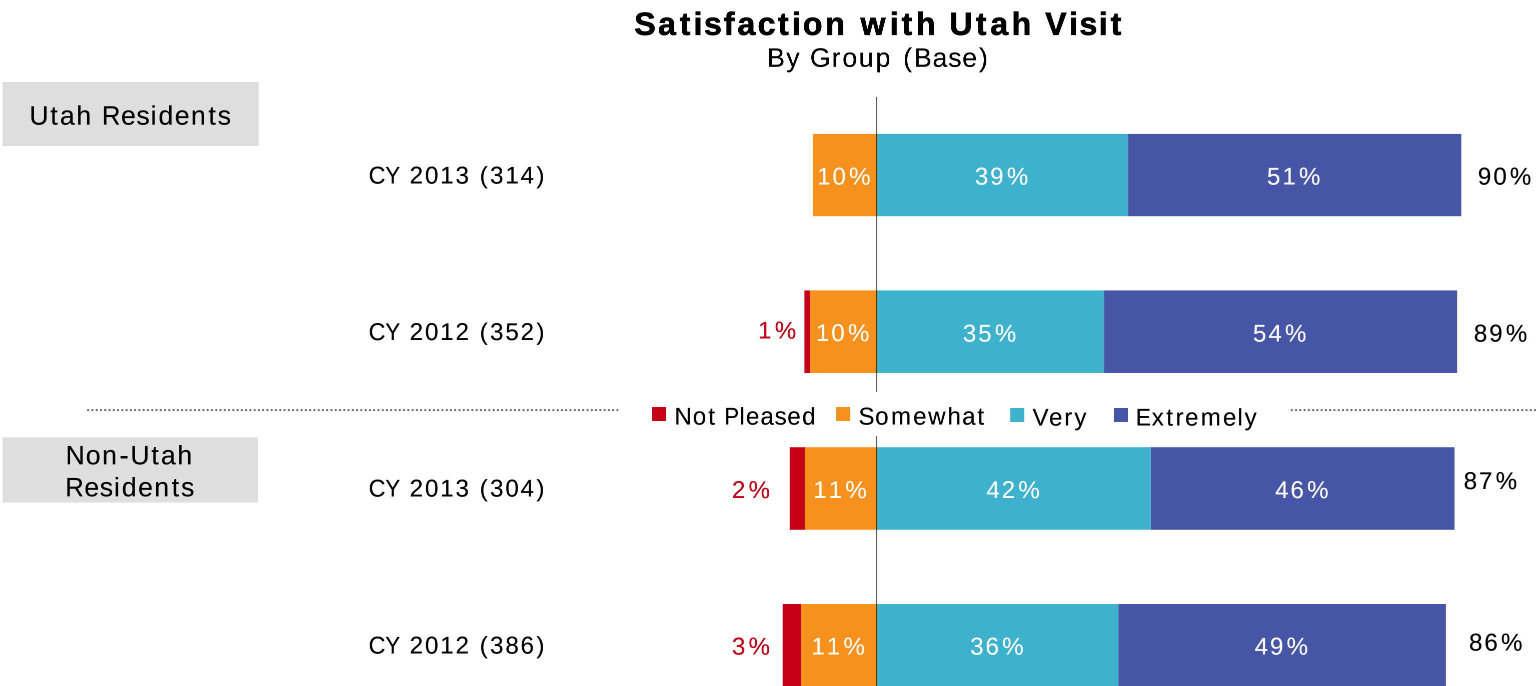
Utah satisfies visitors, with roughly nine in ten feeling extremely/very satisfied; the highest praise comes from in-state residents.



Q4I: Using a scale of 1-5 (5=extremely satisfied), please indicate satisfaction with (area indicated at far left). (State Level – demo wtd.)

Satisfaction: Utah by residence

The high overall satisfaction with Utah remains very stable among both in-state and out-of-state visitors.

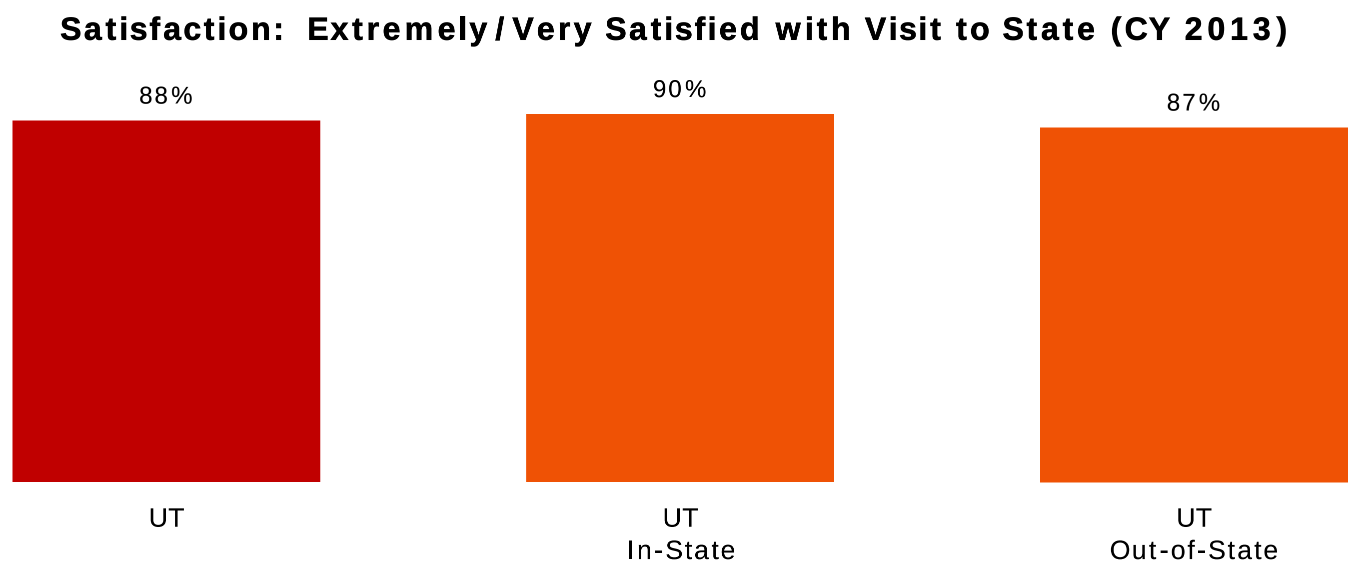


*Note: Not pleased includes *Not At All* and *Not Very Pleased*

Q4l: Using a scale of 1-5 (5=extremely satisfied), please indicate satisfaction with Utah. (State Level-demo wtd.)

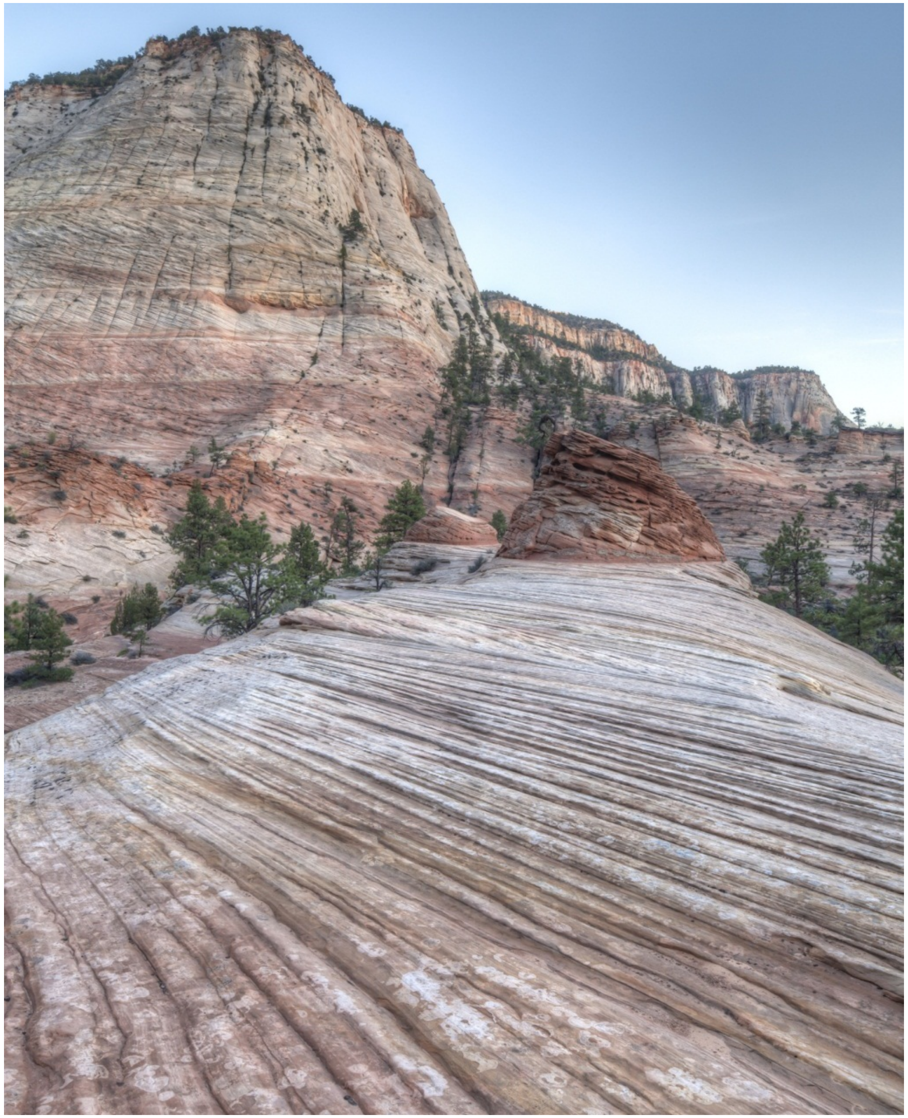
Satisfaction: Utah vs. competitive states

While the competitive states post similar satisfaction levels, Utah ranks third behind Colorado and Montana, but all are very highly rated; Wyoming trails somewhat.



Q4I: Using a scale of 1-5 (5=extremely satisfied), please indicate satisfaction with … (State Level-demo wtd.)

10
Export/Import

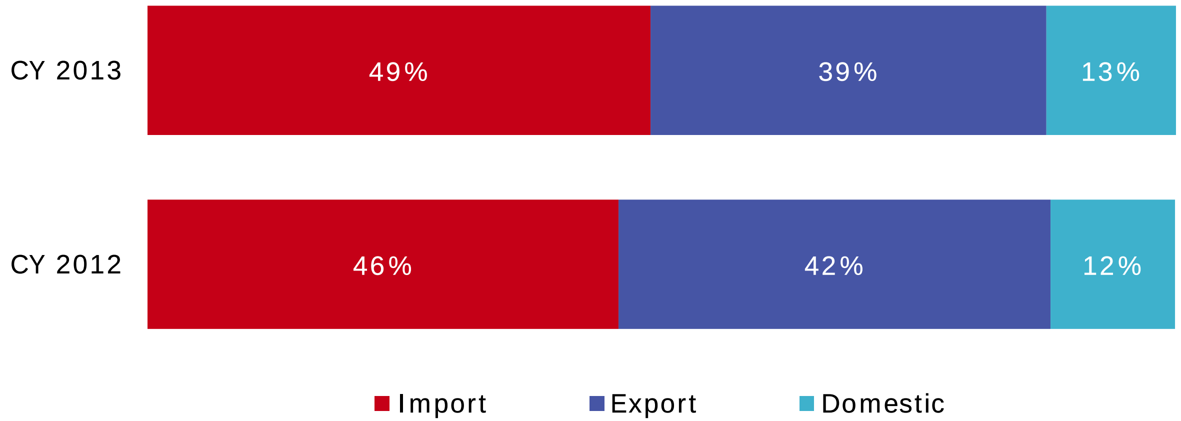


Export/import

“Balance of Trade”:

- Utah imports more tourism than it exports (“balance of trade” deficit)
- However, adding Utah residents’ spending inside the state (“domestic” spending) lifts total tourism dollars spent in Utah above the total spent by residents elsewhere.

Note: Spending that occurs outside the state by non-residents are not included in the chart.



Import represents $ leaving UT

Export represents $ coming into UT

Domestic represents $ staying in UT

Note: Spending that occurs outside the state by non-residents is not included in the chart.

11
Digital Life

Digital lifestyles

In

INFLUENCERS

The Internet is an integral part of my life. I'm young and a big mobile Internet user and generally access everywhere, all of the time. I'm a blogger, and a passionate social networker. I'm also a big online shopper, even via my mobile. I want to make sure as many people as possible hear my online voice.

Co

COMMUNICATORS

I just love talking and expressing myself, whether that's face to face, on a fixed line, mobile or on social networking sites, instant messaging or just emailing people. I really want to express myself in the online world in the way that I can't in the offline one. I tend to be a smart phone user and I'm connecting online from my mobile, at home, at work or at college.

Kn

KNOWLEDGE-SEEKERS

I use the Internet to gain knowledge, information and to educate myself about the world. I'm not a big user of social networks but I do want to hear from like-minded people especially to help me make purchase decisions. I'm very interested in the latest thing.

Ne

NETWORKERS

The Internet is important for me to establish and maintain relationships. I have a busy life whether it's my profession or managing the home. I use things like social networking to keep in touch with people I wouldn't have time to otherwise. I'm a big home Internet home user and I'm very open to talking to brands and looking for promotions. That said I'm not really the kind of person to voice my opinions online.

As

ASPIRERS

I'm looking to create a personal space online. I'm very new to the Internet and I'm accessing via mobile and Internet cafes but mostly from home. I'm not doing a great deal at the moment online but I'm desperate to do more of everything, especially from a mobile device.

Fu

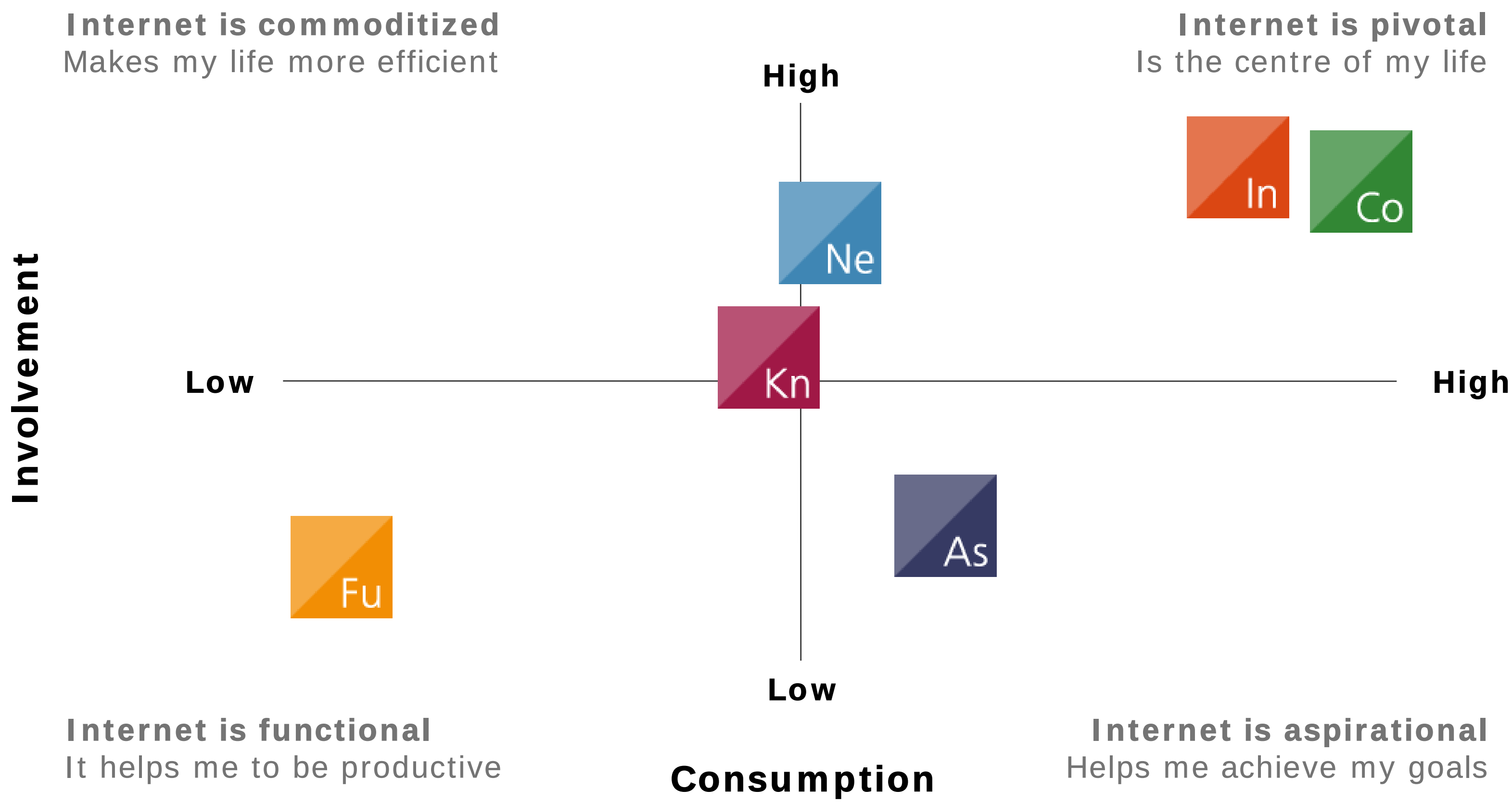
FUNCTIONALS

The Internet is a functional tool, I don't want to express myself online. I like emailing, checking the news, sport & weather but also online shopping. I'm really not interested in running my social life online and I am worried about data privacy and security. I am older and have been using the Internet for a long time.

Source: US Digital Life General Report

Digital lifestyles: consumption/involvement

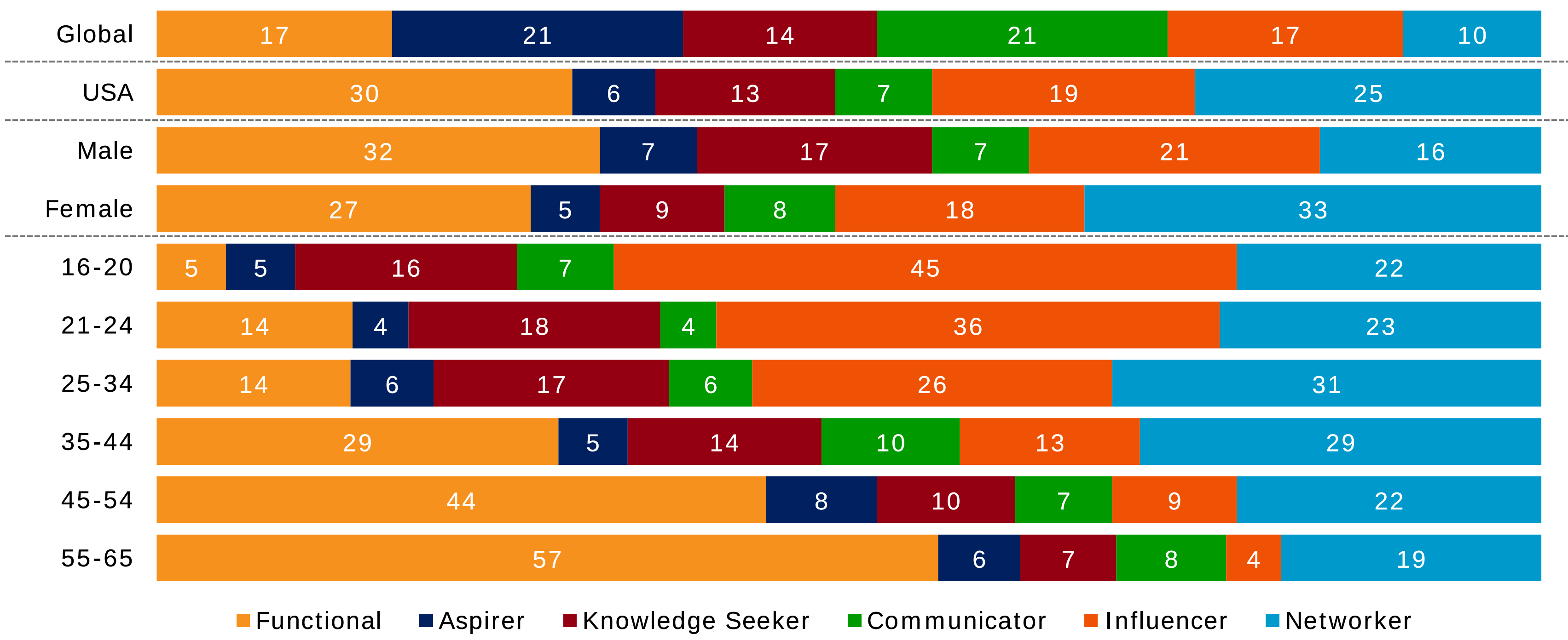
Digital media plays a vital role in the lifestyle of Influencers and Communicators; a good disseminator of their views.



Source: US Digital Life General Report

Digital lifestyles by age

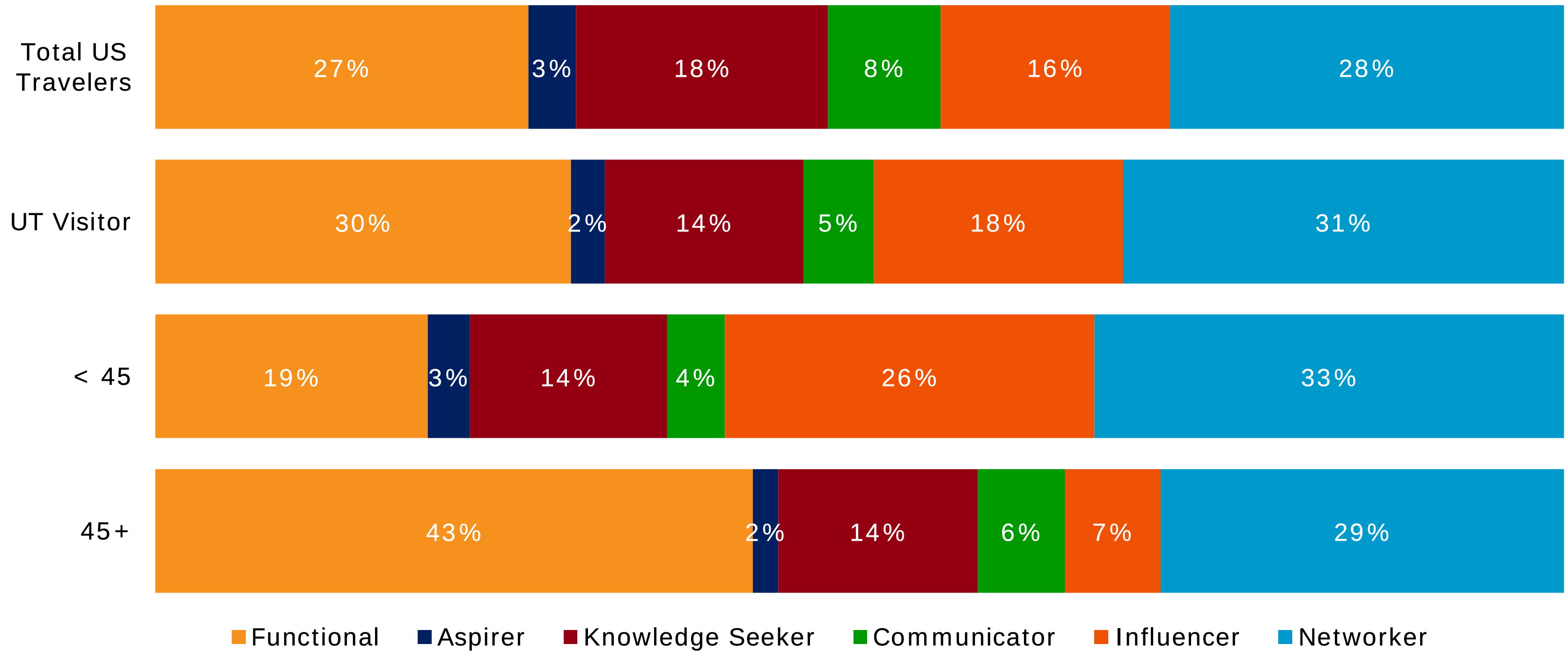
Functional use dominates after age 40. Compared to the rest of the world, the US has a large base of Functionals, especially in older markets; the youth has a larger share of Influencers.



Source: US Digital Life General Report

Digital lifestyles in Utah

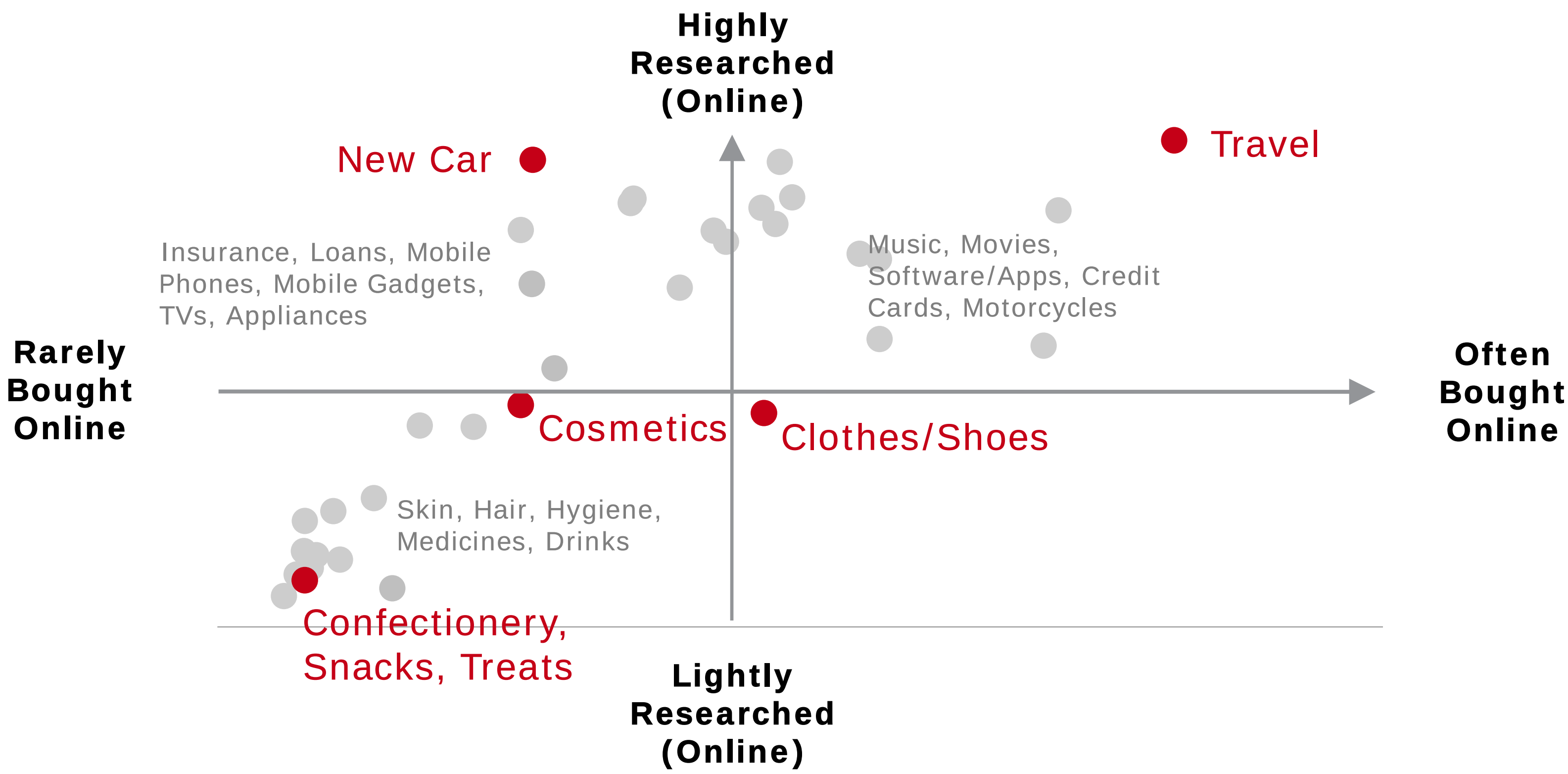
Utah visitors resemble total US travelers and the age break follows the US pattern … with those over 45 much more likely categorized as Functionals while Influencers and Networkers dominate the younger group.



Source: TravelsAmerica Digital Life Segmentation

Online relevance by product type

Travel decisions and purchases both heavily depend upon online resources, far more than any other product.



Source: US Digital Life General Report

12
Demographics

Visitor demographics

Comparisons:

- Utah visitors note similar incomes but more families than US travelers overall
- Compared to out-of-state visitors, in-state visitors tend to be younger, more likely living in families (3+), and less affluent.

Demographics	All US Travelers 2012	All US Travelers 2013	Utah Visitors Total 2012	Utah Visitors Total 2013	Utah In-State Visitors CY 2012	Utah In-State Visitors CY 2013	Utah Out-of-State Visitors CY 2012	Utah Out-of-State Visitors CY 2013
Average Age	48	48	42	44	37	37	46	49
Average Household Income	$69,000	$69,200	$68,500	$72,200	$56,400	$56,600	$77,800	$85,100
% Male	38%	28%	42%	25%	37%	25%	46%	25%
% Married	55	55	71	73	71	76	71	71
% Future Shaper/Maker	33	33	33	28	32	28	34	28
Household Composition								
% One Person	25	25	16	14	14	16	17	13
% Two People	35	35	33	35	22	23	41	45
% Three or More	40	40	52	51	64	62	43	42
Ethnicity								
% Caucasian	86	85	94	92	97	95	92	89
% African-American	6	6	0.4	1	-	-	0.8	1.3

Panel: Age, Income, Children, Ethnicity. (Household Level – demo wtd)

Visitor demographics *continued*

Comparisons:

- Utah business travelers tend to be more affluent with larger families
- Out-of-state leisure visitors report more couples and higher incomes – which impacts trip choices and probably boosts spending in Utah.

Demographics	Utah Visitors Total 2013	Utah Leisure (LS) Visitors	Utah Business Visitors	Utah Day-Trippers	Utah Overnight (O/N) Visitors	Utah In-State O/N LS Visitors	Utah Out-of-State O/N LS Visitors
Average Age	44	43	45	40	45	35	50
Average Household Income	$72,200	$69,700	$95,200	$56,200	$77,800	$56,700	$85,900
% Male	25	23	38	23	25	26	22
% Married	73	73	76	75	73	78	68
% Future Shaper/Maker	28	30	31	18	32	41	29
Household Composition							
% One Person	14	14	16	18	13	11	14
% Two People	35	35	21	33	36	23	46
% Three or More	51	50	63	49	52	66	40
Ethnicity							
% Caucasian	92	93	87	93	91	98	90
% African-American	1	1	-	-	1	-	2

Panel: Age, Income, Children, Ethnicity. (Household Level – demo wtd)

Visitor demographics by state

Demographics vary somewhat by state visited, especially income. Nevada does the best job of attracting out-of-state visitors (45% from California) while Utah, Colorado, Arizona, and Montana rely on in-state travelers for roughly half of their tourism.

Demographics	Utah Visitors CY 2013
Average Age	44
Average Household Income	$72,200
% Male	25%
% Married	73
% Future Shaper/Maker	28
% In-State Visitor	45
Household Composition	
% One Person	14
% Two People	35
% Three or More	51
Ethnicity	
% Caucasian	92
% African-American	1
Total Households (Census)	880,873

Census: http://quickfacts.census.gov/qfd/index.html

Panel: Age, Income, Children, Ethnicity. (Household Level – demo wtd)

13
Background and Research Methods

Introduction and purposes of the research

BRAND	■ Utah Office of Tourism
STUDY HISTORY AND DESIGN	■ The first TravelsAmerica report for Utah Office of Tourism ■ Online data collection conducted continuously throughout the year by TNS as a nationwide syndication.

STUDY OBJECTIVES – ASSESSMENT OF THESE TOPICS:	■ **Proportion of Visitors to the State of Utah:** Overnight, Day, Business, Leisure, Residents, Non-Residents
	■ **Profile of Leisure Visitors to Utah:**
	    ■ **Source of Visitors:** state and DMA of visitor residence
	    ■ **Basic Demographics**: age, children in household, income
	    ■ **Trip Characteristics:** day vs. overnight, business, spending, length of stay, activities selected, quarterly trends
	    ■ **Mode of Transportation:** air, own auto/truck, rental car, other
	    ■ **Export/Import "Balance of Trade" Assessment:** spending by Utah residents traveling elsewhere vs. non-Utah residents visiting Utah; also includes domestic spending by visitors living in Utah
	    ■ **Competitors:** Colorado, Arizona, Idaho, Wyoming, Montana, Nevada snapshot comparisons.
	    ■ **Digital Life:** Digital lifestyles of Utah visitors

Glossary

Term	Definition
Balance of Trade	Net Export-Import (Surplus = +; Deficit = -)
Import	Money departing the state (Utah residents vacationing elsewhere)
Export	Money entering the state (Non-Utah residents visiting Utah)
DMA	Designated Market Area: Counties that share the same primary TV broadcast signals (210 DMAs in US)
Calendar Year	January 1 through December 31
In-State	Utah Residents
Out-of-State	Non-Utah Residents
Person-Trip	Total person-trips are all trips taken by all people; i.e. a couple taking three trips counts as six (two people, each taking three trips)
Respondent/Household Level	Respondent information – one count per respondent
Source of Visitors	Residence of visitors
State/Region Level	Information about all trips taken to a particular state/region (each trip to area counts)
Travel Party	Traveler plus all companions, including children
Trip	Travel 50 miles or more (one-way) away from home or stayed overnight. Excludes commuters or commercial travel (flight attendants, commercial vehicle operator) This eliminates some leisure day trips that are closer than 50 miles from home
Trip Level	Information about all trips – each trip counts
Trip Volume	All trips summed together
FutureView™	TNS' FutureView™ identifies five consumer categories: Future Shapers, Future Makers, Today Consumers, Yesterday Consumers, Yesteryear Consumers. Of those, "Future Shapers" quickly adopt new products and influence others. They share seven traits: value authenticity/originality, well informed/involved, individualistic, time-poor, socially responsible, curious/open-minded/receptive to new ideas, and advocates of new ideas – they spread the word.
Visitor	Person who has visited Utah in the past month; all are US residents, thus, travel is domestic travel only (domestic consumer). The focus of this report is a Utah Visitor Profile Study, January – December 2013.

Type of activity summary

Art & Culture	Art galleries, historic sites/churches, museums, musical theater, old homes/mansions, theater/drama, symphony/opera/concert
Adventure Sports	Hang gliding/skydiving, hike/backpack, rock/mountain climb, scuba dive/snorkel, ski/snowboard (cross country or downhill), water ski, whitewater raft/kayak/canoe, wildlife view, zoos
Sports and Recreation	Bike, fish (fresh or saltwater), golf, horseback ride, hunt, major sports event, motor sports (NASCAR/Indy), motor boat/jet ski, sail, snowmobile, tennis, youth/amateur/collegiate sporting events
Nature/ Outdoor Activities	Beaches, bird watch, camp, caverns, nature travel/ecotour, wildlife view, zoos
Entertainment/Amusement	Casino/gaming, fine dining, nightclubs/dancing, shop, spa/health club, special events (e.g., Mardi Gras, hot air balloon races), theme park, wine taste/winery tour, craft breweries (small, independent, traditional brewers)
Family Activities/Reunions	Family reunions, high school/college reunions, visiting friends, visiting relatives
Sightsee	Rural sightsee, urban sightsee, see area where a TV show or movie was filmed
Parks and Gardens	Gardens, state/national park

Research methods

DATA COLLECTION PROCESS

- TNS closely manages its Lightspeed US panel by carefully monitoring and limiting the number of contacts with each household in order to keep Internet penetration high and panel fatigue low
- TravelsAmerica is a web-based study with monthly e-mail invitations sent to representative households from its panel
- TravelsAmerica targets a 45% response rate; the field period runs for two weeks, usually starting in the middle of the first week
- Data are weighted as follows:
  - Demographically (such as region, age, income, household size, marital status) to reflect the characteristics of US households
  - Trip and state projection calculations count every trip taken by respondents; detailed information is collected for up to three trips in the past month and projected to the number of households in the total US
  - In addition, a few tables represent person-trips – these take into account the immediate travel party size for each household as well

Utah Visitors and Total Travelers For Calendar Year ending December 31, 2013

CY 2012 Travelers (Unweighted Respondents)	CY 2013 Travelers (Unweighted Respondents)	CY 2012 Travelers (Weighted by Demographics)	CY 2013 Travelers (Weighted by Demographics)	Region
604	576	631	564	Utah Residents
778	699	785	661	Utah Visitor Households
70,455	65,372	68,439	66,096	Total for TravelsAmerica

Thank you

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