KANTAR TNS

Calendar Year 2016 – Utah TravelsAmerica Visitor Profile Report

June 28, 2017

TNS 212 246143

UTAH
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1
Growth Summary

TNS Growth Map

Your business issues

- In 2015,* the Tourism, Travel, and Recreation (TTR) industry contributed $8.2 billion (up from $7.8 billion in 2014) to Utah's economy ($7.0 billion from non-residents), generating $1.15 billion in taxes and 143K jobs (including indirect impact); TTR ranks ninth as a major industry in Utah and supports one of every 10 jobs in Utah.
- 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.
- According to USTA estimates, domestic and international travel spending in Utah increased 2.9% in 2016 to $8.4 billion.
- As noted last year, traveler spending is again impacted by lower gasoline prices for car travel. So …lower nominal travel spending does not necessarily mean less travel; lower prices can yield lower spending as well.

http://www.travel.utah.gov/research-planning and USTA

Growth Summary

Growth insights

- Attract new visitors by enticing those living in or traveling to Western US areas to add or extend trips to Utah (including non-border states – a broader reach than most travel destinations).
- Utah's ability to engage local (in-state) vacationers lifts its visitor volume above prior years. Although they spend less than out-of-staters, the increase in visitors holds tourism revenue steady.
- Adventure Sports – a small, but high-spending segment – attracts younger visitors who may be drawn back to Utah as they age.
- The largest type of visitors, Family/Friend/Reunions, likely visit regardless of marketing efforts and spend less than any other type. So, while not adding so much to tourism revenue, they can become strong, vocal ambassadors for the state.
- The most lucrative visitors (20% of tourism revenue) come for entertainment and amusement; this sizeable segment spends the second-largest amount. Art/culture/history aficionados also represent a sizeable, lucrative (15% of revenue) group.
- Out-of-state visitors, less familiar with state features than locals, heavily use online resources to research travel, especially search engines, social media, and destination websites.
- "Imports" (Utah visitors spending their leisure dollars elsewhere) remain below the combined level of "domestic spending" + "exports" – yielding a positive position for the state.

Note: See type of activity summary for activity descriptions (slide 64)

Precise plans for growth

- Continue to focus on larger nearby markets within driving distance and in other Western states (notably California) as the advertising budget allows.
- Highlight messaging on activities that attract leisure visitors, particularly Utah's unique topography/scenery, vast array of state/national parks, sports/outdoor activities, history, and entertainment.
- Encourage residents to promote Utah (act as ambassadors) to their friends and family, showcasing the state when they visit.
- Continue to entice art/cultural/history types with Utah's varied history and churches as they bring revenue to the state … only Adventure Sports enthusiasts spend more.
- Utah's online presence can reach many potential visitors with its already excellent website and owned social media sites (Facebook, Instagram, Twitter, etc.).
- Consider increasing leads and conversions from your online campaigns with TNS' Digital Segment Targeting, which reaches a precise audience and mindset (case study for Nevada: slides 70-71).

Purposes/primary objectives of research

Brand/History

Utah Office of Tourism

- 4th Report for Utah
- Continuous online data collection via Kantar TNS nationwide syndication

Visitor Type

Visitors to the State of Utah – type and purpose of trips:

- Overnight
- Day
- Business
- Leisure
- Residents
- Non-residents

Profile

Characteristics:

- Visitor source - residence: State and DMA
- Demographics - age, children, income
- Trip - spending, length of stay, activities, quarterly trends
- Transportation mode
- Competitor (Colorado, Arizona, Idaho, Wyoming, Montana, Nevada) snapshot comparisons

Benefits

Balance of Trade:

- Export/Import spending (non-UT residents spending in UT vs. UT residents traveling elsewhere)
- "Domestic spending" (UT residents vacationing within the state)
- Most lucrative niche targets (derived from activities)

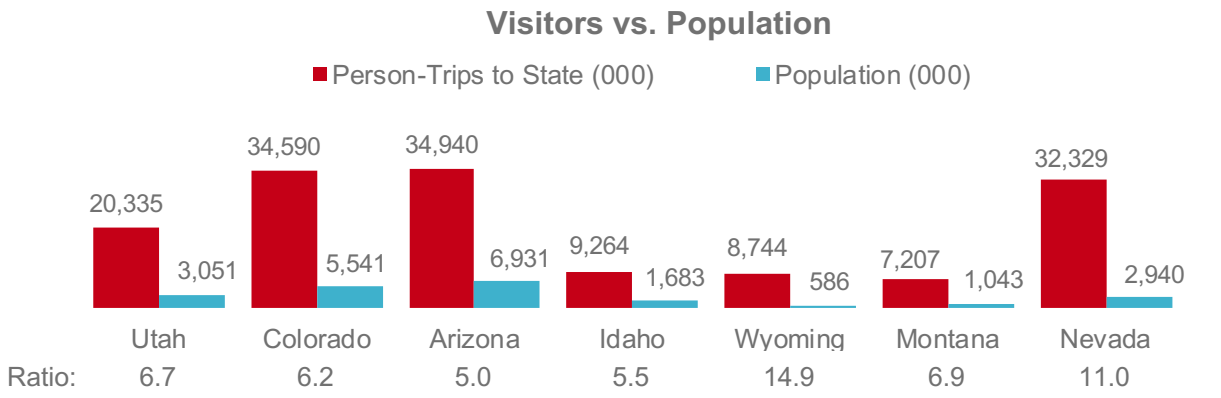
2
Executive Summary

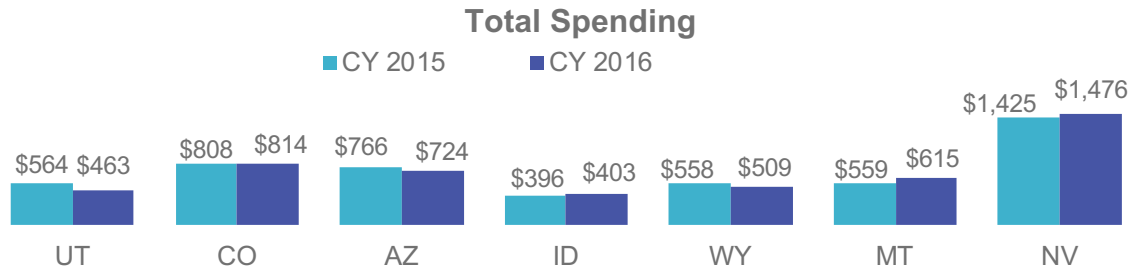
Tourism remains a leading export for Utah

- 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 6.7 visitors per resident, places Utah 4th among these 7 states (notably, Wyoming and Montana get a lift from Yellowstone National Park; Nevada from gaming).

- Utah visitor spending declines slightly, but remains ahead of Idaho; Arizona and Wyoming also slip while others post spending gains.

- Utah's "balance-of-trade" remains nearly static, continuing to sell Utah to enough in- and out-of-state visitors to exceed the amount that residents spend by traveling elsewhere (import). The "export" and "domestic" spending suggests that Utah continues to position its features as a place to spend leisure/vacation time and $$$, but has room for improvement.

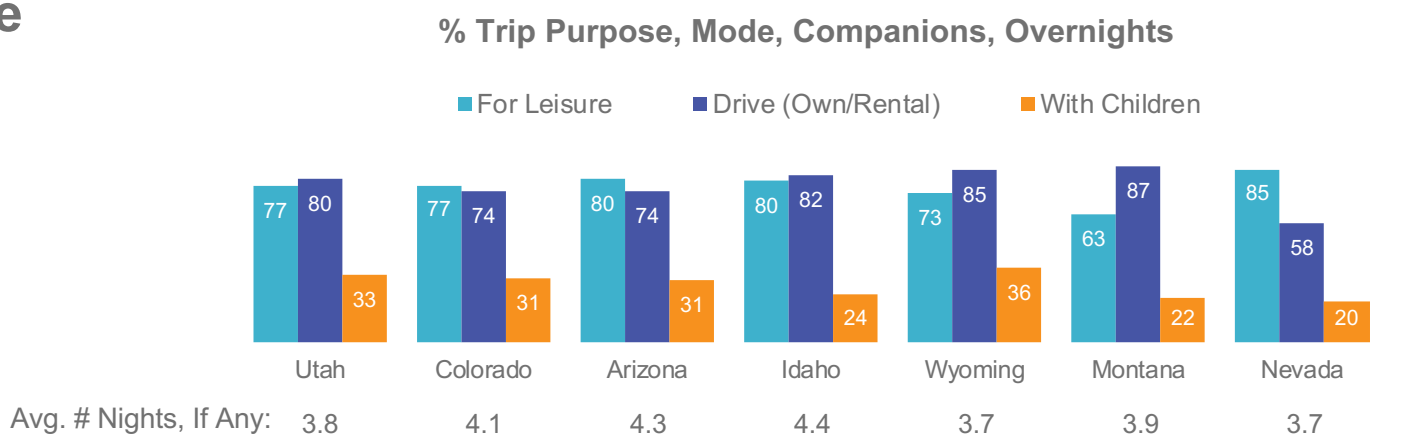




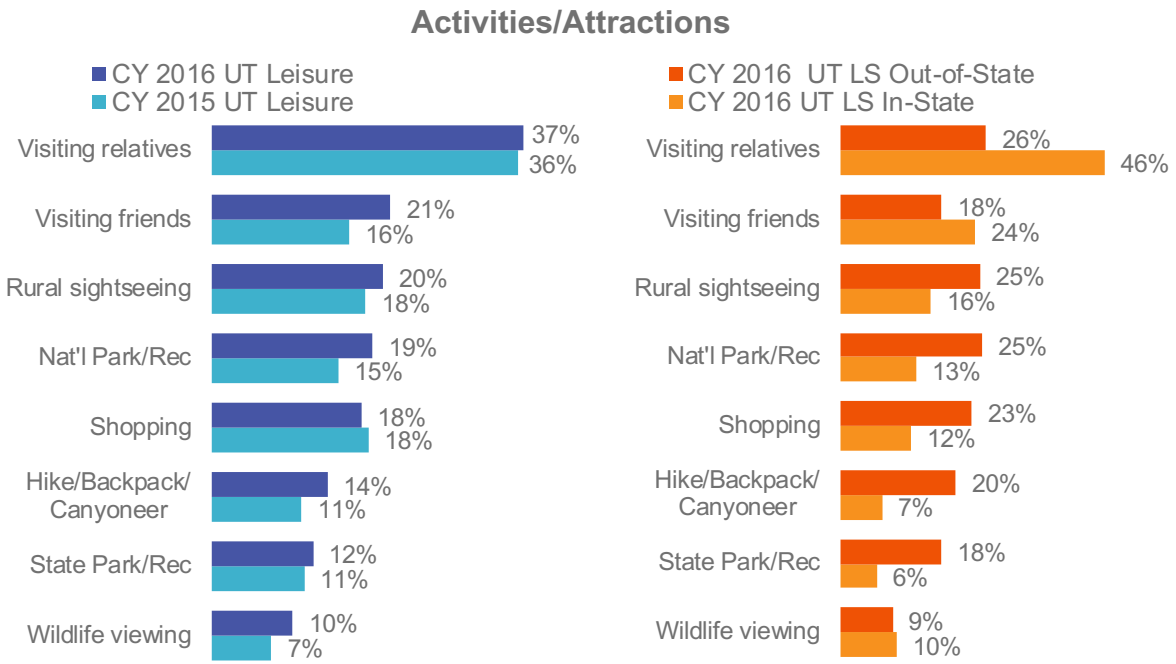
Import represents $ leaving UT
Export represents $ coming into UT
Domestic represents $ staying in UT

Why visitors come to Utah; what they like

- Similar to the past and similar to competitive states, Utah primarily entertains leisure visitors. Most visitors drive and the average stay lasts roughly 4 nights. Utah and Wyoming visitors most likely bring children.
- In contrast to other competitors, Nevada visitors, aided by Las Vegas, more likely fly and fewer bring children.

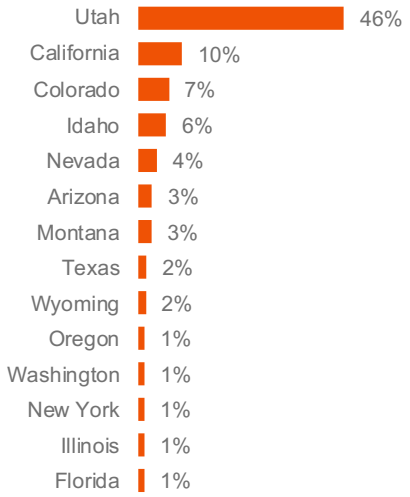


- Compared to a year ago, visitors tend to engage in more of each leading activity … except shopping.
- More out-of-state visitors take advantage of Utah's many outdoor features – especially sightseeing, visiting parks (both state and national), and visiting historic sites; they are much less likely to come to visit relatives or friends.

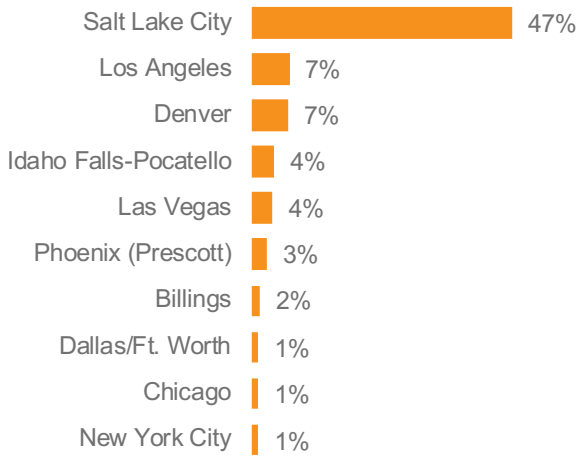


From where they come … to where they go
(CY 2016)

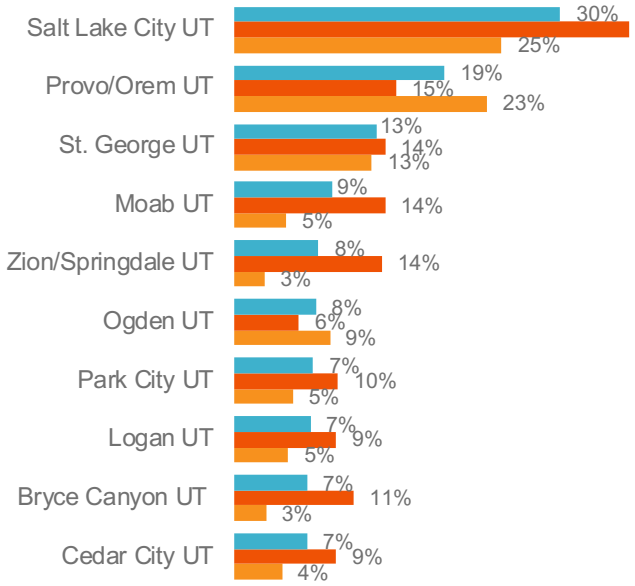
- Utah primarily draws visitors from within its borders and these nearby states: California, Colorado, Idaho, Nevada, Arizona, and Montana. Unlike many destinations, the key source markets do not always border Utah (most notably, California).



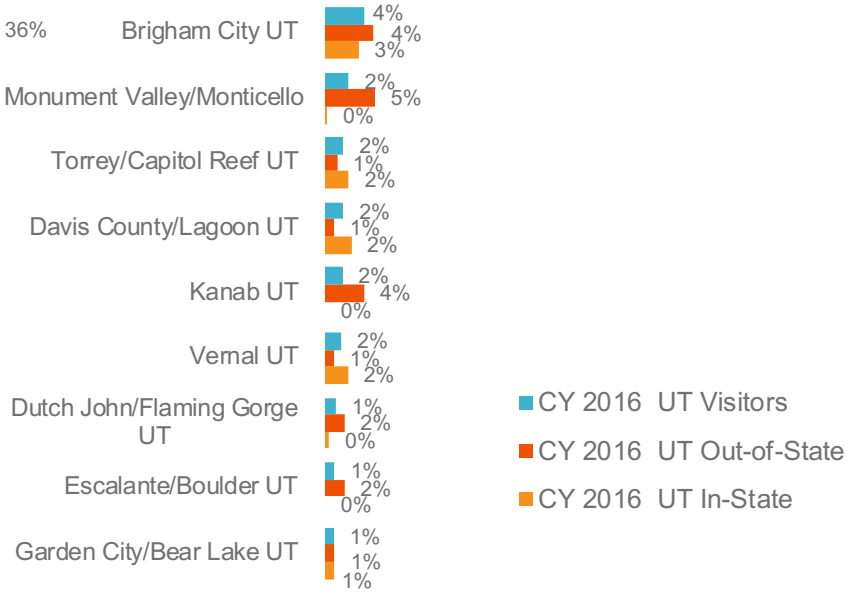
From Where …



- Visitors flock to the largest Utah cities, regardless of where they live. However, some differences appear by residence, with out-of-state visitors more likely choosing multiple places per trip (1.8 vs. 1.4 areas) and more often including Salt Lake City, Moab, Zion, Park City, Logan, Bryce Canyon, Cedar City, and Monument Valley than in-state visitors.

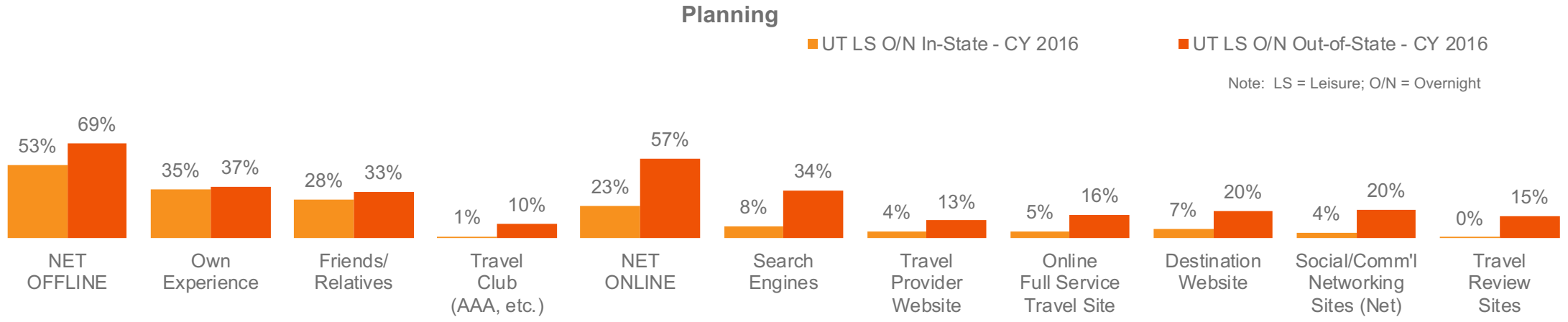


To Where …

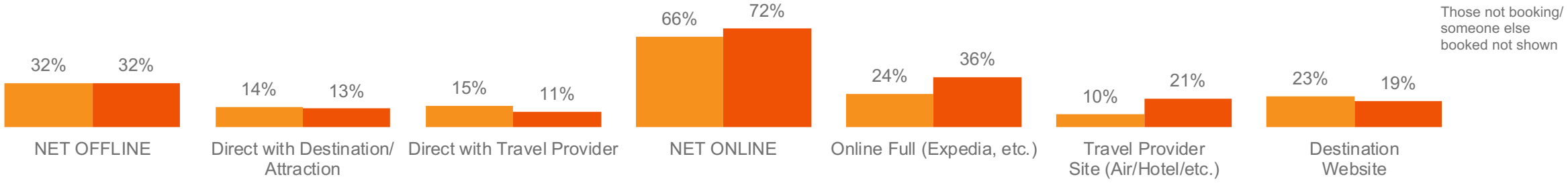


Utah visitors most commonly rely on their own experience and friends/ relatives to plan; they usually book online

- Out-of-state visitors' online usage far exceeds that of in-state visitors for planning.



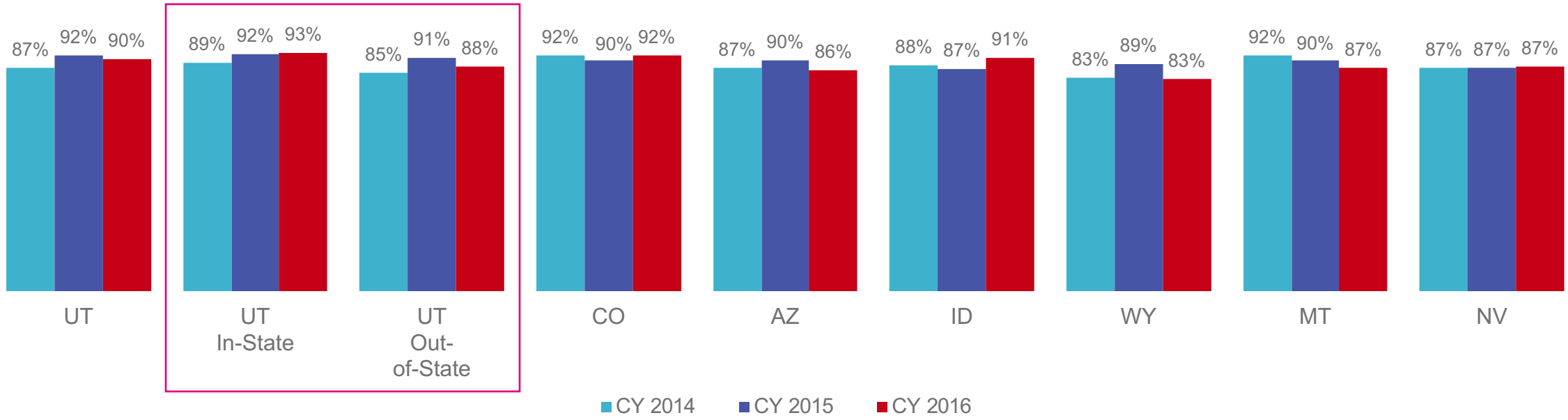
- In-state residents are more inclined than out-of-staters to book directly with the provider offline or with the destination (either online or offline).



Utah sends visitors home happy

Utah satisfies visitors, remaining slightly ahead of most competitors (Colorado and Idaho “catch-up” and now share the lead). Higher in-state than out-of-state scores suggest that those with greater familiarity notice more of Utah’s strengths, but all highly satisfied visitors can influence their friends/relatives to visit Utah.

Satisfaction: Extremely/Very Satisfied with Visit to State (CY 2016)



Sizing and revenue by Utah visitors' selected activities

- Family/reunions boast, by far, the largest visitor participation of any niche
- However, spending the least of any group, it ranks third (tying sightseeing) in share of visitor revenue
- Entertainment (shopping/dining/amusement parks, etc.) ranks **first** in generated revenue although it leads in neither participation nor spending levels
- Those enjoying Utah's high brow options (arts/culture) spend more than most others, making them relatively lucrative visitors (ranking second in revenue) for Utah
- As noted last year, adventure sports enthusiasts spend the most, but represent a relatively small group.

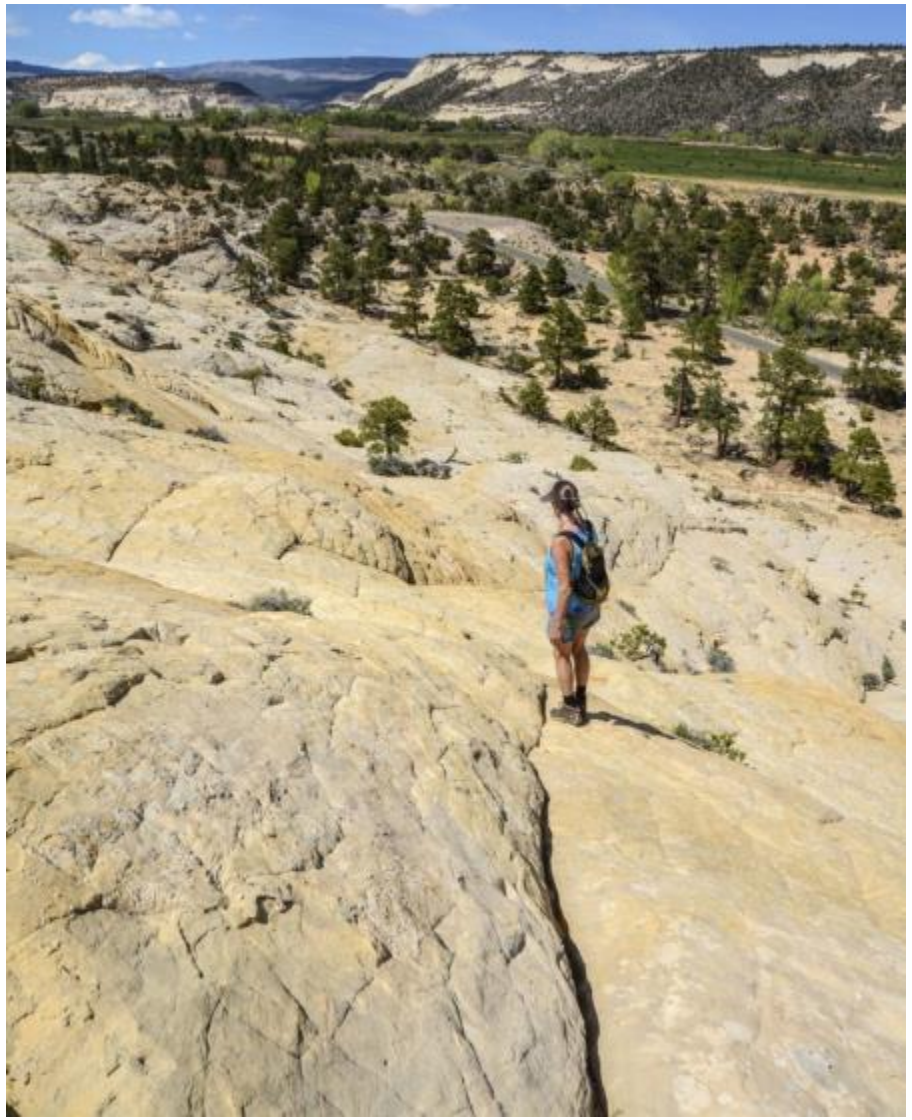
	% Active in Each Type	Average Spend	Average Age	% of Revenue
Family Activities/Reunion	41%	$363	43	13%
Entertainment/Amusement	26%	$892	44	20%
Parks and Gardens	21%	$654	49	12%
Art & Culture	21%	$805	44	15%
Sightseeing	20%	$722	50	13%
Nature/Outdoor Activities	19%	$581	44	9%
Adventure Sports	14%	$949	41	12%
Sports and Recreation	12%	$654	45	7%

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

*See glossary for activities describing each niche (slide 69)

3
Appendix: Detailed Results

4
Share of Visitors



Share of visitors, both total trips and person-trips

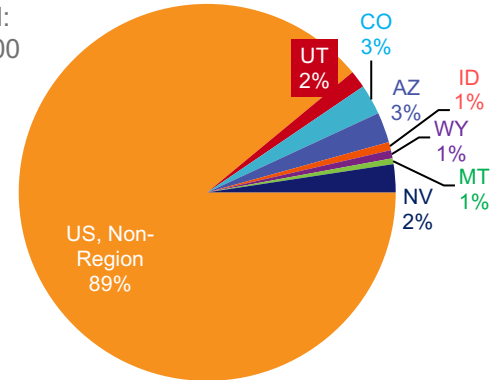
Trips = 50+ miles from home (one-way) or spent 1+ nights

Market Overview:

- Utah visitors make up 1.5% of total US travel
- Another viewpoint shows "visitors vs. residents." Hosting over 20 million total visitors (from all parts of the US), tourism and business travel provide substantial revenue to UT.

Visitation – % of Person-Trips: Seven States

Person-Trips Total:
US = 1,342,594,000
UT = 20,335,000



Travel and Tourism Impact

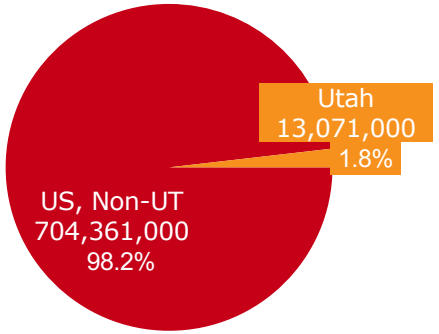
Population - Census (2016 est.) US / Utah	Number of US Visitors to Utah
323,127,513 / 3,051,217	20,335,000

Total Trips:

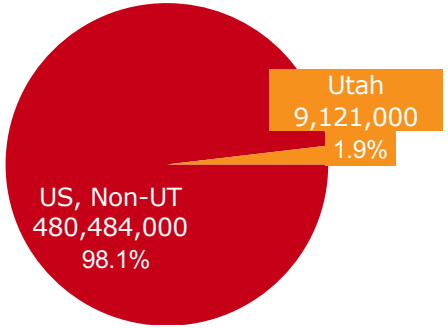
- US residents took over 13 million trips to Utah in CY 2016 (includes in-state visitors)
- Overnight trips make up 70% of Utah trips, slightly more than the US overall (68%).

Visitation – All Trips by Households

All Trips (Day + Overnight) 717,432,000



Overnight Trips Only 489,605,000



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

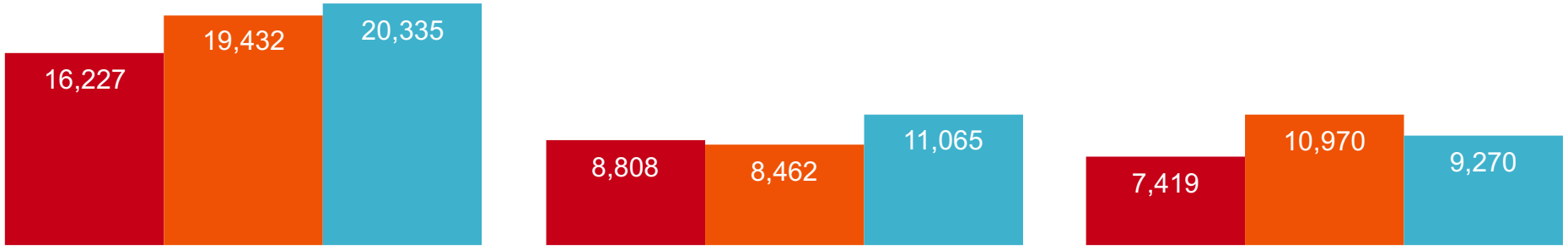
Q4a. Please indicate US state(s) visited; Q4e. Day or Overnight; Q3b for households (projected)

Visitor volume (person-trips) continues to climb from prior years

(Trips = 50+ miles from home (one-way) or spent 1+ nights)

The largest boost in CY 2016 comes from in-state visitors.

Visitation – Person-Trips (000): Utah Visitors



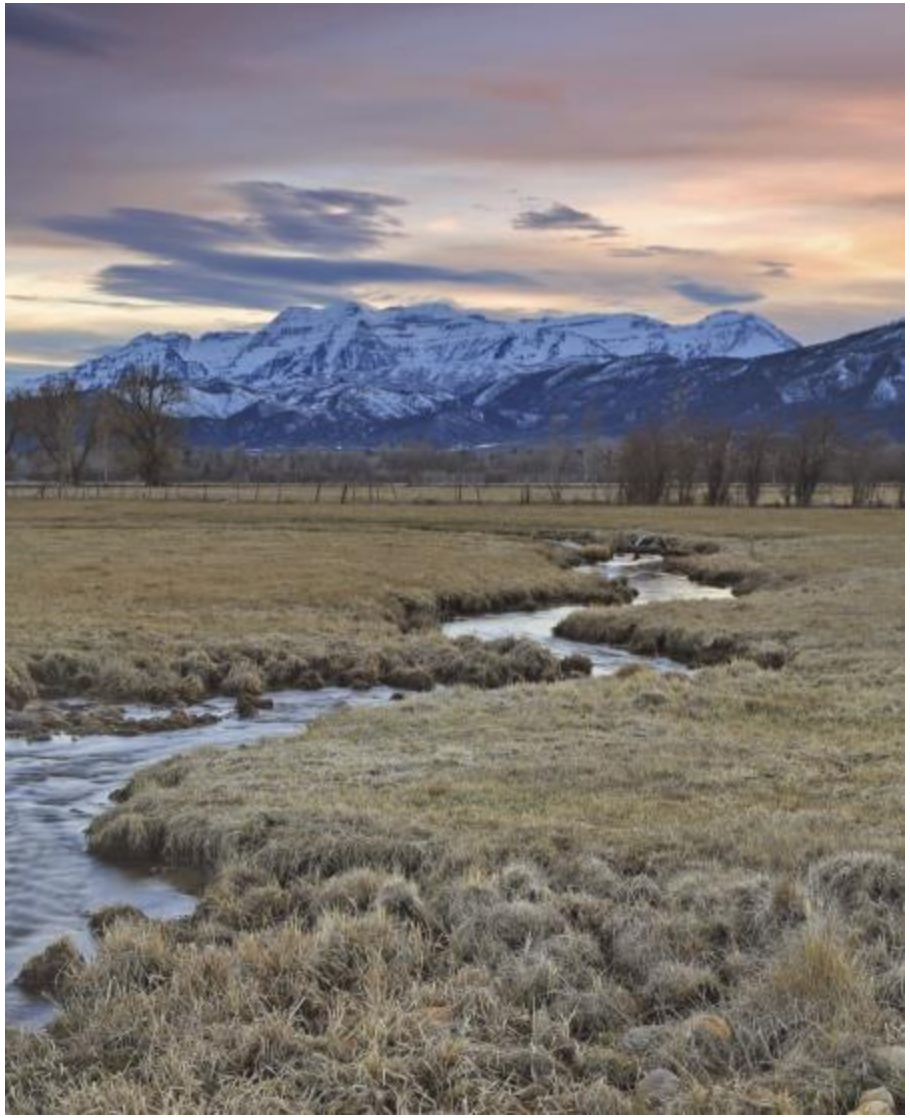
	Total			In-State			Out-of-State		
Leisure:	11,537	15,118	15,658	6,262	6,223	8,266	5,275	8,859	7,351
Business:	1,704	1,166	1,728	749	405	741	920	748	954
Unclassified:	2,970	3,148	2,949	1,797	1,834	2,058	1,217	1,365	965
Leisure:	(71%)	(78%)	(77%)	(71%)	(74%)	(75%)	(71%)	(81%)	(79%)
Business:	(11%)	(6%)	(9%)	(9%)	(5%)	(7%)	(12%)	(7%)	(10%)
Unclassified:	(18%)	(16%)	(15%)	(20%)	(22%)	(19%)	(16%)	(12%)	(10%)

Q4a. Please indicate US state(s) visited

Note: A rather small business sample (16 in-state; 23 out-of-state) contributes to volatility

5

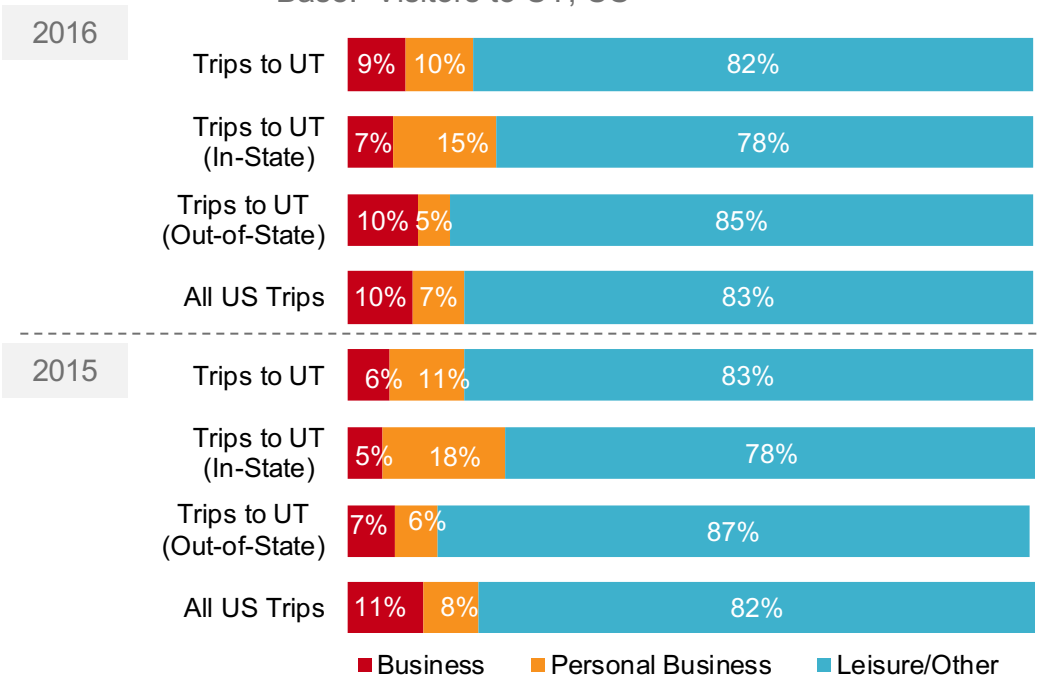
Trip Purpose/Source of Visits/Timing

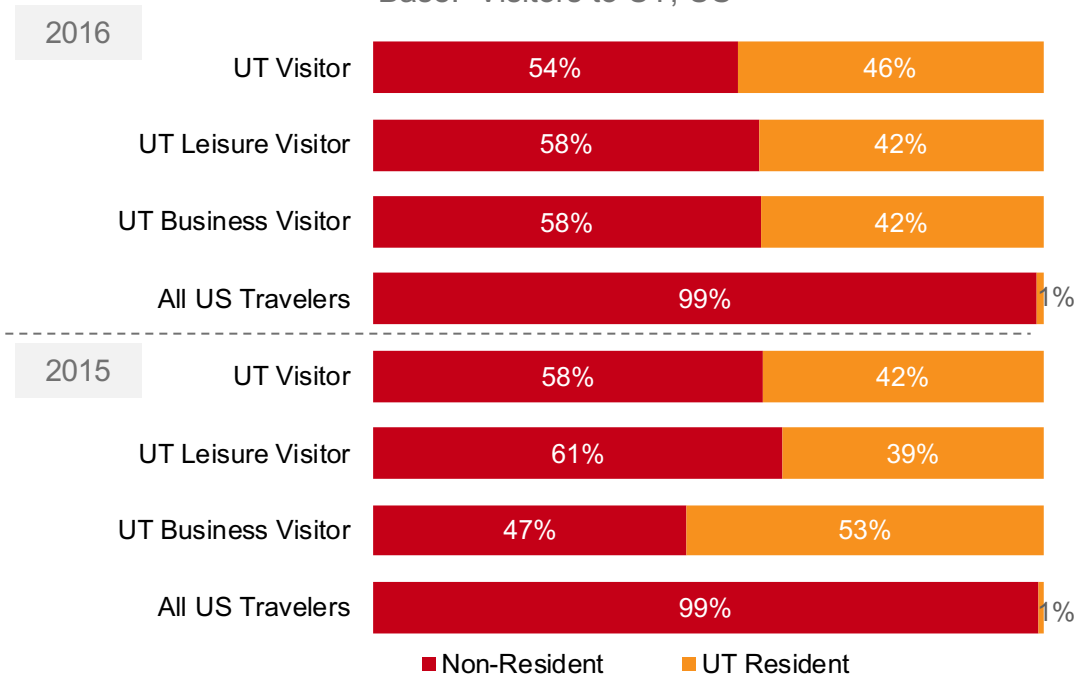


Most visitors travel to Utah for leisure

- Meanwhile, Utah draws more than half of its visitor travel parties from out-of-state.

Trip/Visitor Characteristics
% of Visitors to State

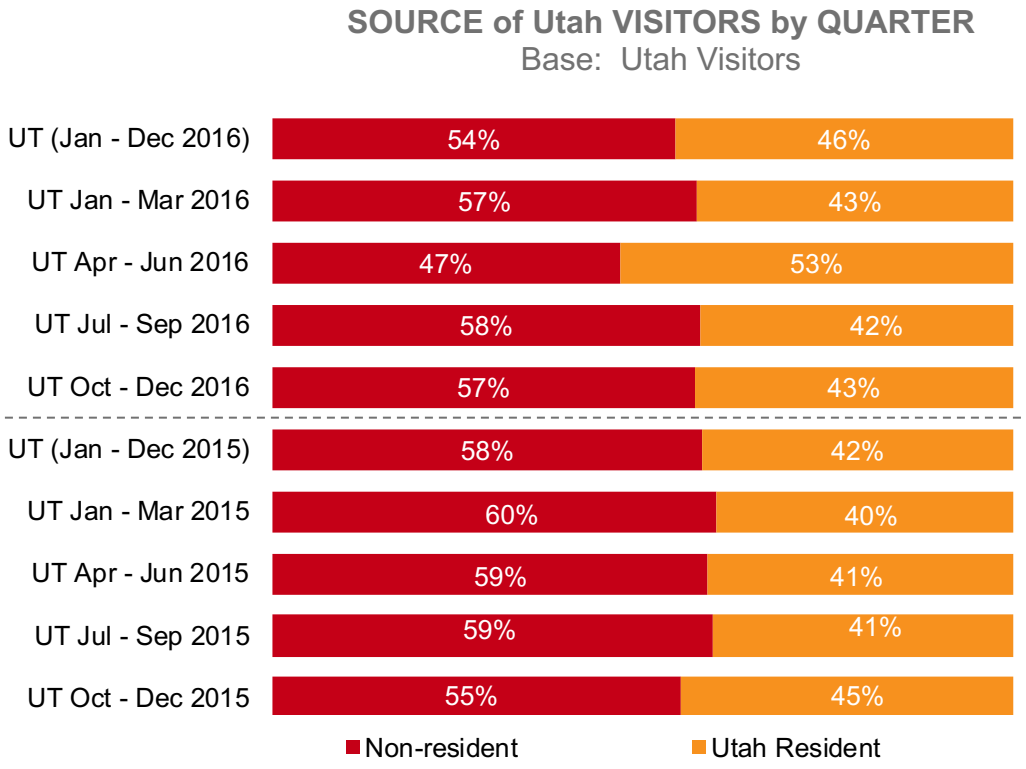


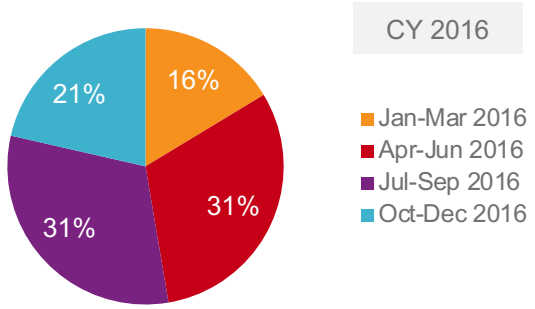


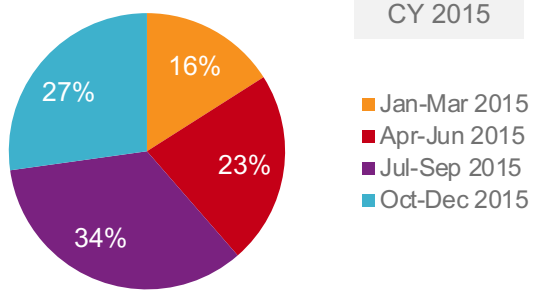
Panel: Residence of visitors (Household Level)
Q1b. Which of the following was the PRIMARY purpose of trip to . . .
(Household Trip Level – demo wtd)

Panel: Residence of visitors (Household Level)

Drawing more visitors during the spring and summer seasons, Utah usually pulls the largest share of travel parties from out-of-state, although residents outnumber out-of-staters in Q2





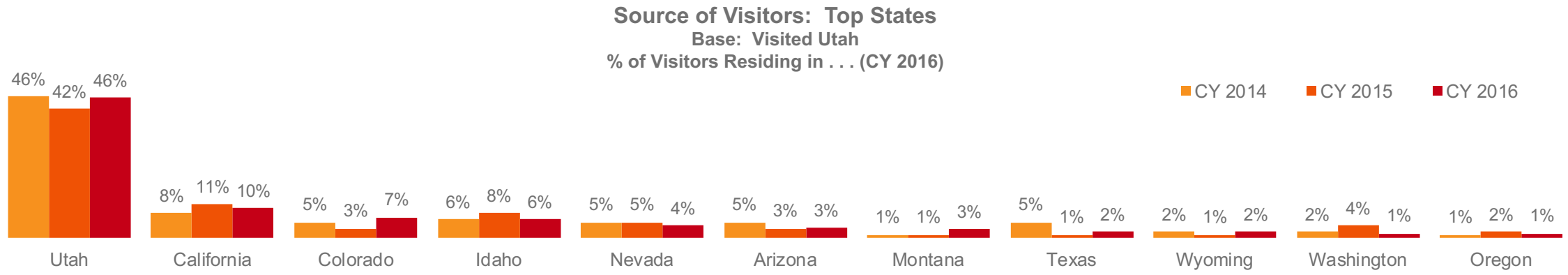


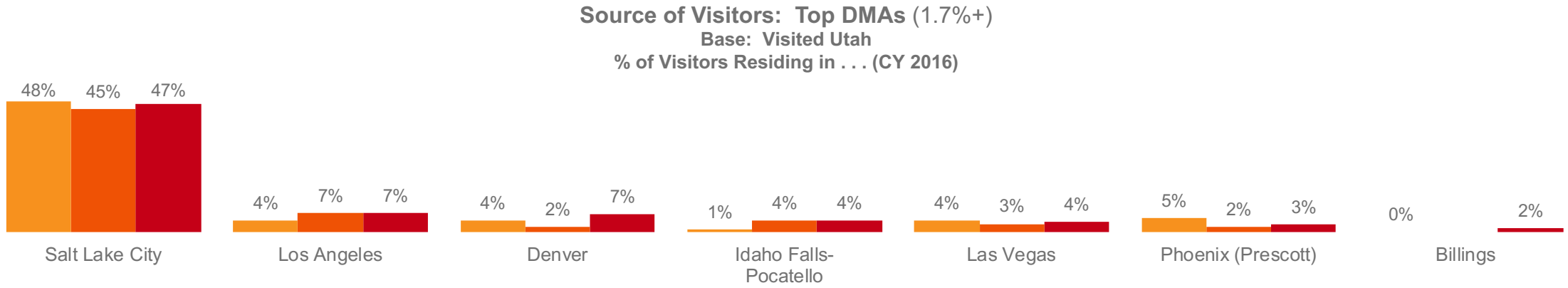
Panel: State/DMA residence of those who visited Utah (Household Level)

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

The largest share of out-of-state visitors come from CA

- Rocky Mountain and Pacific states and cities provides most visitors.





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

Note: SLC DMA extends beyond Utah boundaries

6
Planning and Booking

Day-trip and in-state visitors travel more spontaneously

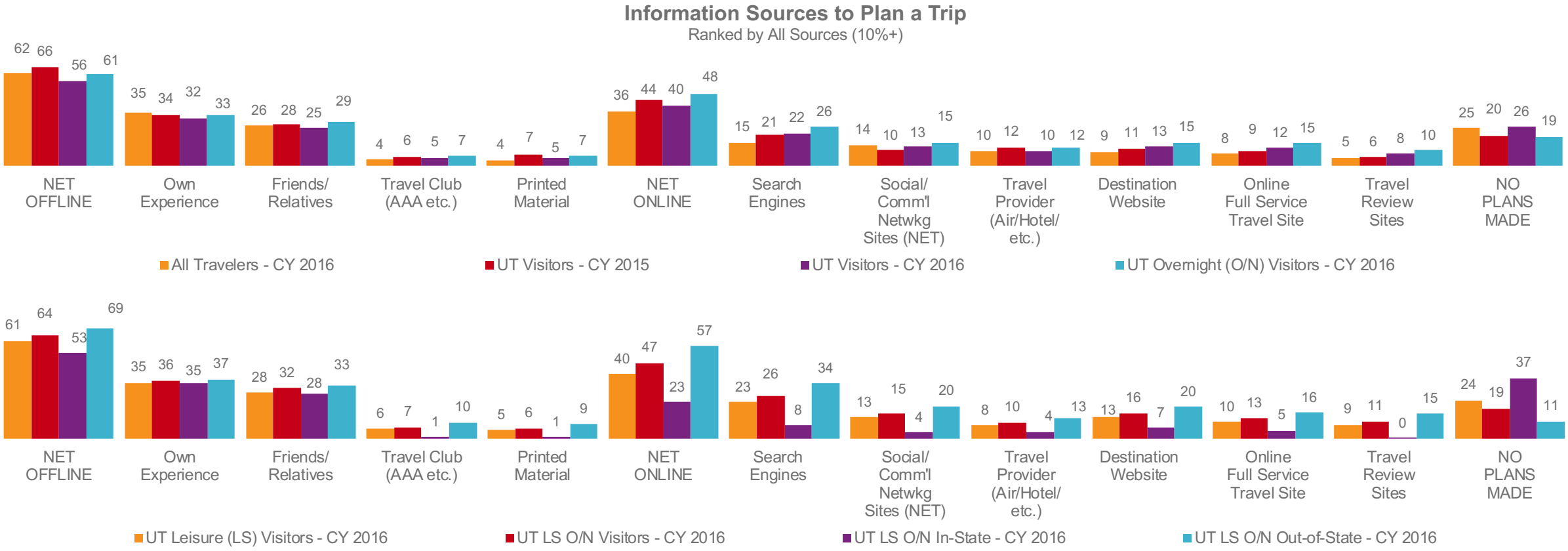
- Since day-trip visitors and in-state visitors have fewer travel considerations (lodging, fewer meals, transportation logistics), they spend much less time planning and deciding on a trip
- A slightly shorter planning window, compared to last year, reflects the gain in in-state visitors, but still remains longer than US trip planning overall.

Trip Planning (Time Before Visit)	All US Travelers (All Trips) CY 2016	UT Visitors Total CY 2015	UT Visitors Total CY 2016	UT Visitors Leisure O/N* CY 2016	UT Visitors Leisure Day Trip CY 2016	UT In-State Visitors CY 2016	UT Out-of-State Visitors CY 2016	UT In-State O/N Leisure Visitors CY 2016	UT Out-of-State O/N Leisure Visitors CY 2016
Considered									
Within Two Weeks	32%	25%	30%	19%	49%	52%	16%	42%	10%
2 – 4 Weeks	16	13	13	11	14	11	13	13	11
1 – 3 Months	19	15	16	19	11	15	17	15	22
3+ Months	34	47	42	50	25	22	54	31	58
Decided									
Within Two Weeks	40%	32%	38%	28%	59%	61%	24%	52%	18%
2 – 4 Weeks	17	15	16	15	10	13	18	11	17
1 – 3 Months	18	18	17	21	14	14	20	16	24
3+ Months	25	35	29	35	18	13	39	21	41

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

Utah visitors take advantage of planning resources, mimicking US travelers

- More out-of-state overnight visitors rely on planning resources, especially online sources and travel books and clubs, while their in-state counterparts let their own experiences guide them.



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

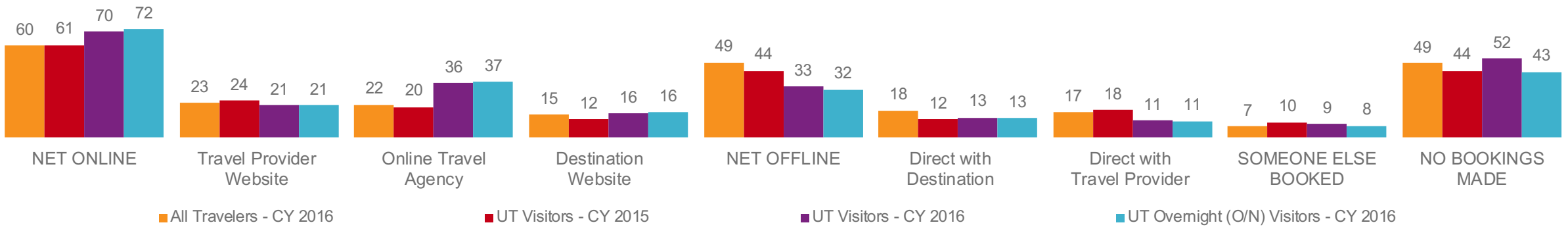
Note: Social/Comm'l Network = Facebook, LinkedIn, Twitter, etc.

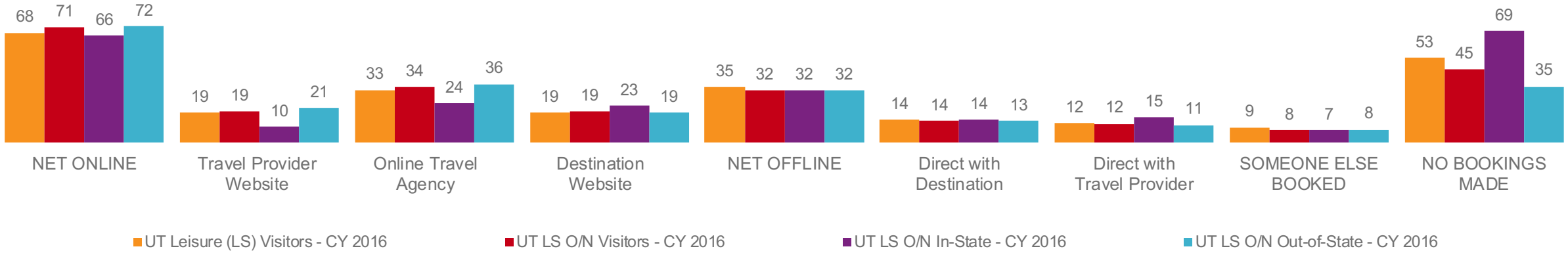
LS = Leisure O/N = Overnight

Utah visitors more likely book online than US travelers

- More out-of-state visitors, traveling farther and staying longer, book travel components – especially via travel providers (air, hotels, rentals, etc.) and online travel agencies (Expedia, etc.). In-staters usually (69%) skip the booking process.

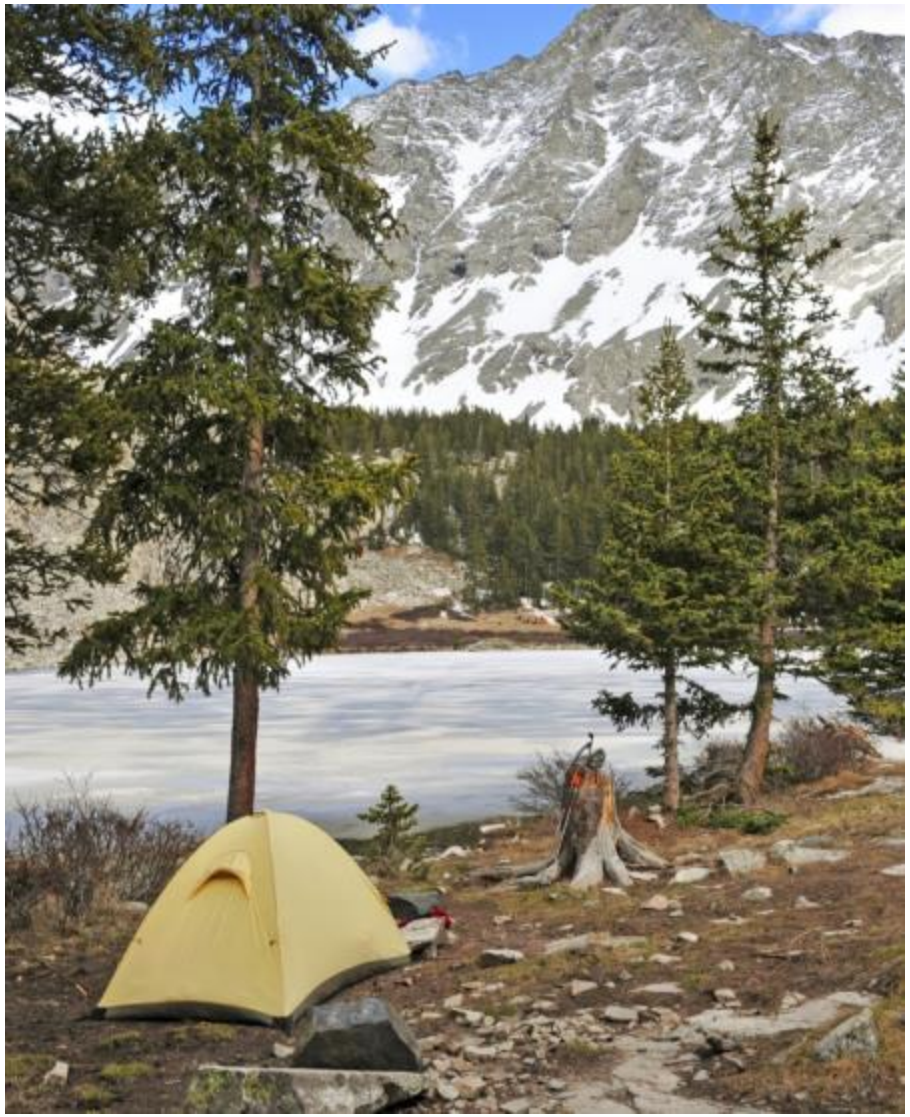
Method Used to Book Trip Components (If Any)
Ranked by All Sources (10%+)





Note: LS = Leisure O/N = Overnight
Q4k. Please indicate the method(s) you used to book your trip . . . (State Level – demo wtd)

7
Trip Characteristics



Most (77%) visitors come to Utah to play and spend more time outdoors than average travelers

- Traveling further, more out-of-state visitors understandably fly and stay longer.

LS=Leisure; O/N = Overnight

Trip Choices (Trip Level)	All US Travelers CY 2016	UT Visitors CY 2015	UT Visitors CY 2016	UT Visitors LS O/N	UT Visitors Day Trip 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	80%	79%	77%	100	100	75%	79%	100	100
Visit Friends/Relatives	43	43	40	51	54	42	38	58	48
Entertainment/Sightsee	13	13	12	16	16	8	17	8	21
Outdoor Recreation	8	11	12	18	3	10	14	17	19
Business	10	6	9	-	-	7	10	-	-
Personal Business/Other	10	15	15	-	-	19	10	-	-
PRIMARY MODE									
% Own Auto/Truck	76%	74%	76%	74%	95%	89%	62%	92%	64%
% Air Travel	13	14	10	12	1	1	19	1	19

Lodging (State Level)	All US Travelers CY 2016	UT Visitors CY 2015	UT Visitors CY 2016	UT Visitors LS O/N	UT Visitors Day Trip 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)	3.6	3.7	3.8	3.8	-	2.9	4.5	2.7	4.5
Private Home	1.2	1.7	1.3	1.4	-	1.1	1.5	1.3	1.4
Hotel/Motel	1.4	1.1	1.1	1.0	-	0.6	1.5	0.6	1.3
RV/Tent	0.2	0.4	0.6	0.5	-	0.7	0.6	0.4	0.7
All Other	0.8	0.5	0.8	0.9	-	0.5	0.9	0.4	1.1

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)

Utah and Colorado visitors lead in outdoor recreation

- Utah visitors stay longer than the US average, but places near center among competitors
- Nevada visitors more likely fly.

Trip Choices (Trip Level)	All US Travelers CY 2016	Visit UT	Visit CO	Visit AZ	Visit ID	Visit WY	Visit MT	Visit NV
PRIMARY TRIP PURPOSE								
NET Leisure	80%	77%	77%	80%	80%	73%	63%	85%
Visit Friends/Relatives	43	40	37	41	45	37	26	28
Entertainment/Sightsee	13	12	14	14	9	15	15	28
Outdoor Recreation	8	12	13	11	11	9	7	6
Business	10	9	12	10	8	10	10	9
Personal Business/Other	10	15	11	10	12	17	27	6
PRIMARY MODE								
% Own Auto/Truck	76%	76%	66%	66%	76%	74%	82%	48%
% Air Travel	13	10	19	18	9	7	5	35

Lodging (State Level)	All US Trips CY 2016	Visit UT	Visit CO	Visit AZ	Visit ID	Visit WY	Visit MT	Visit NV
AVG # NIGHTS (if any)	3.6	3.8	4.1	4.3	4.4	3.7	3.9	3.7
Private Home	1.2	1.3	1.2	1.4	2.1	1.0	1.0	0.5
Hotel/Motel	1.4	1.1	1.7	1.5	1.2	1.6	1.7	2.4
RV/Tent	0.2	0.6	0.3	0.4	0.3	0.3	0.4	0.1
All Other	0.8	0.8	0.9	1.0	0.8	0.8	0.8	0.7

More likely to travel with children, Utah visitors travel in slightly larger groups than average

- Of **overnight leisure visitors,** in-staters far more likely travel with kids than non-residents; the latter group most commonly travels in pairs
- Somewhat larger travel parties in Summer (Q3) and Winter (Q1) more likely include children.

LS=Leisure; O/N = Overnight

Trip Characteristics (Trip Level)	All US Travelers CY 2016	UT Visitors Total	UT Visitors for Business	UT Visitors for Leisure LS	UT Visitors 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	2.6	2.8	1.8	2.9	2.9	2.9	2.7	3.2	2.8
% Travel in Pairs	41%	39%	15%	39%	38%	36%	41%	31%	43%
% Travel w/ Children	29	33	12	38	37	35	32	47	33
Avg # Kids Inc. 0	0.6	0.7	0.4	0.8	0.8	0.8	0.6	1.2	0.6
Avg # Kids Exc. 0	1.9	2.2	2.9	2.2	2.2	2.4	1.9	2.6	1.9

Trip Characteristics (Trip Level)	Utah Visitors 2015	Utah Visitors 2016	Q1 Jan – Mar 2016	Q2 Apr – Jun 2016	Q3 Jul – Sep 2016	Q4 Oct – Dec 2016
AVERAGE # IN TRAVEL PARTY (Q3a)	3.0	2.8	3.0	2.6	3.0	2.7
% Travel in Pairs	43%	39%	28%	45%	34%	44%
% Traveling with Children	34	33	41	26	38	30
Avg. # of Children on Trip Inc. Zero	0.8	0.7	0.9	0.5	0.9	0.6
Avg. # of Children on Trip Exc. Zero	2.2	2.2	2.3	1.9	2.4	2.0

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

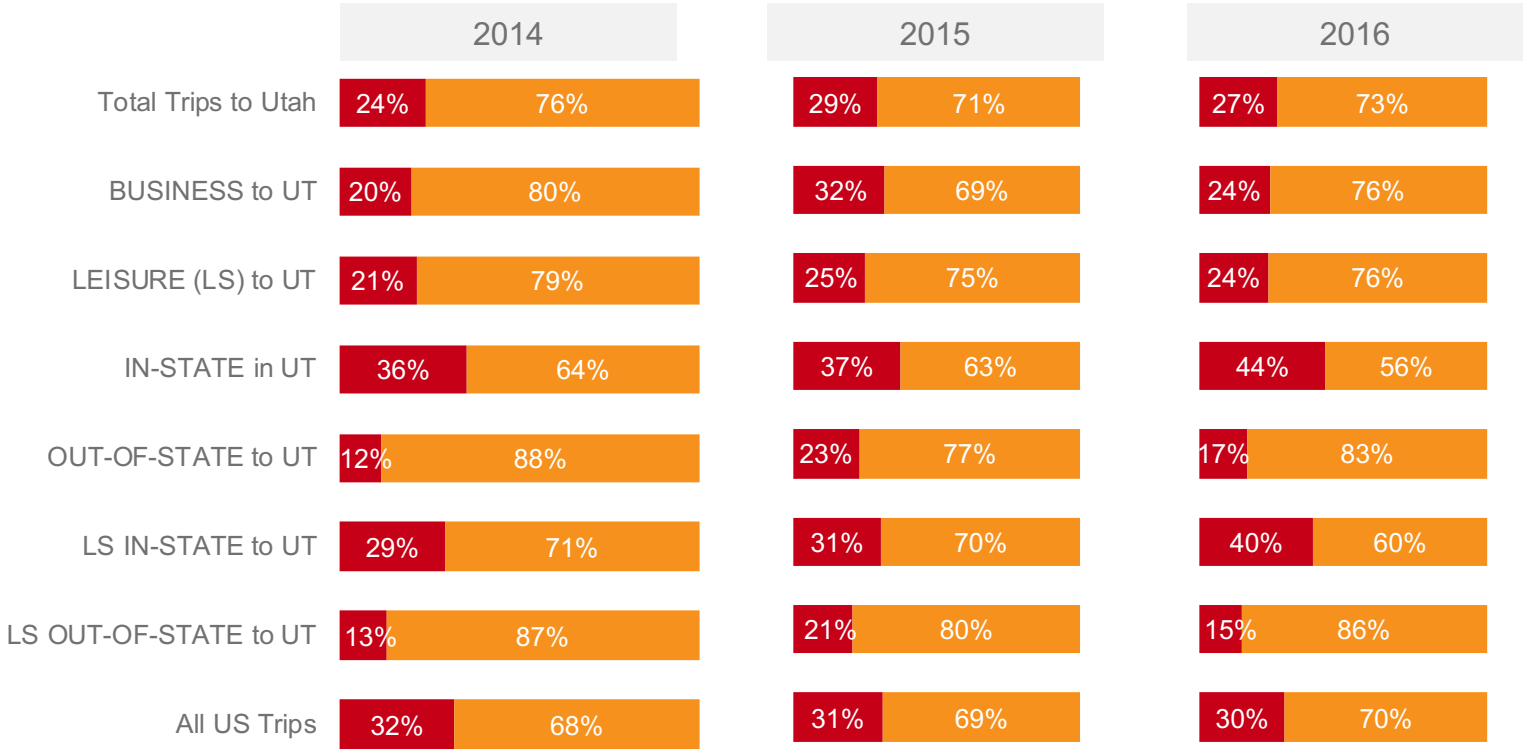
Among these states, Utah's and Wyoming's larger travel parties most often include children

Trip Characteristics (Trip Level)	All US Travelers CY 2016	Visit UT	Visit CO	Visit AZ	Visit ID	Visit WY	Visit MT	Visit NV
AVERAGE # IN TRAVEL PARTY	2.6	2.8	2.6	2.6	2.5	3.0	2.4	2.7
% Travel in Pairs	41%	39%	41%	43%	44%	35%	45%	47%
% Traveling with Children	29	33	31	31	24	36	22	20
Avg. # of Children on Trip Inc. 0	0.6	0.7	0.6	0.6	0.5	0.8	0.4	0.4
Avg. # of Children on Trip Exc. 0	1.9	2.2	1.9	1.9	2.1	2.2	1.7	1.8

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

As in the past, Utah visitors usually spend the night, especially those from out-of-state

% DAY/OVERNIGHT TRIPS
Base: Trips to State; Total US



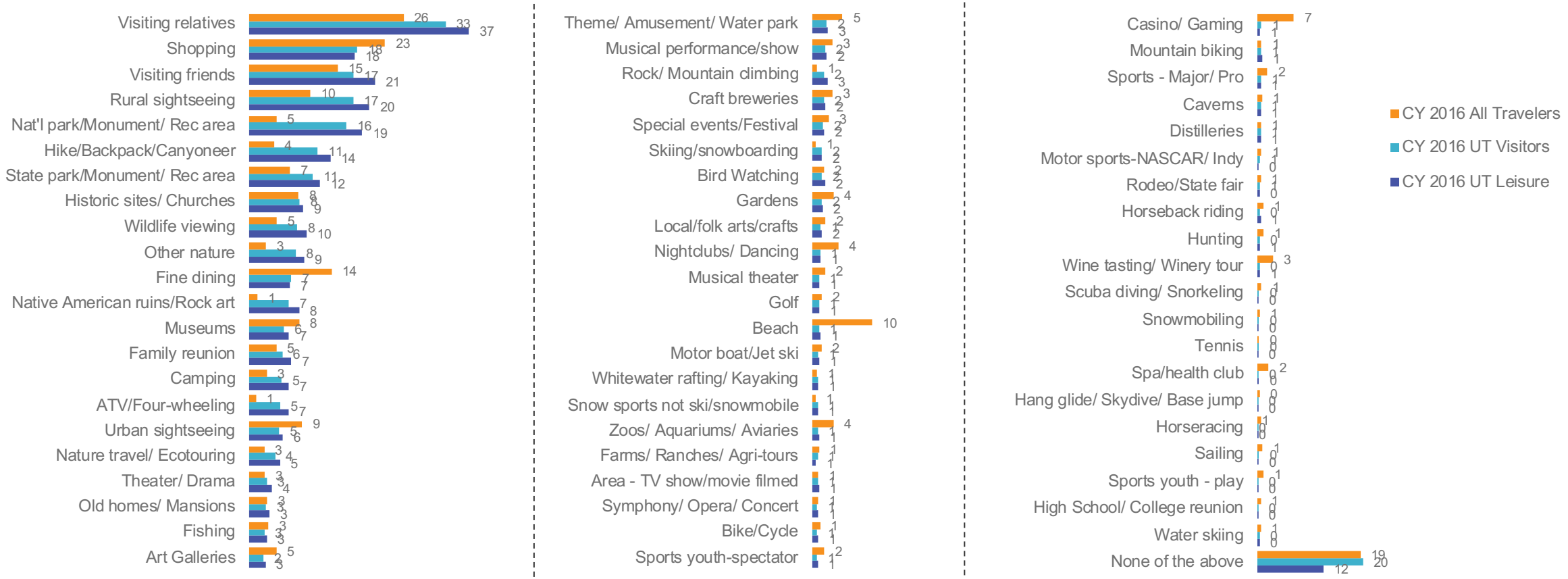
(Note: personal business and other are not classified as either business or leisure trips).

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

More focused on outdoor features than US travelers …

- Utah visitors place stronger emphasis on: family/friends, sightsee, parks/recreation, hike/backpack, wildlife and nature, ruins/art, camping, and ATVs, and less on shopping, fine dining, urban sightseeing, theme parks, nightclubs/dancing, beaches, and gaming.

CY 2016 % Activities Participated/Attractions
Ranked by 2016 Utah Visitors



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

Activity choices change little from last year, except some outdoor activities increase a bit

(Parks/monuments/recreation areas, hiking, ATV/four-wheeling, rural sightseeing, and wildlife viewing)

Trend: % Activities Participated/Attractions by Utah Leisure Visitors

Ranked by 2016 Total Utah Visitors (1%+)

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

KANTAR TNS

Out-of-staters far more often (boxes) choose Utah's outdoor recreational options and culture

Activities Participated/Attractions Visited by Leisure Visitors

% Participated/Visited – Ranked by 2016 Utah Out-of-State Visitors

Note: LS = Leisure

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

Out-of-state vacation activities/attractions by CY 2016 quarter

Sample by quarter (unweighted):
Q4: 67
Q3: 95
Q2: 69
Q1: 50

Activities Participated/Attractions Visited by Leisure Visitors
% Participated/Visited – Ranked by 2016 Utah Out-of-State Visitors (1%+)

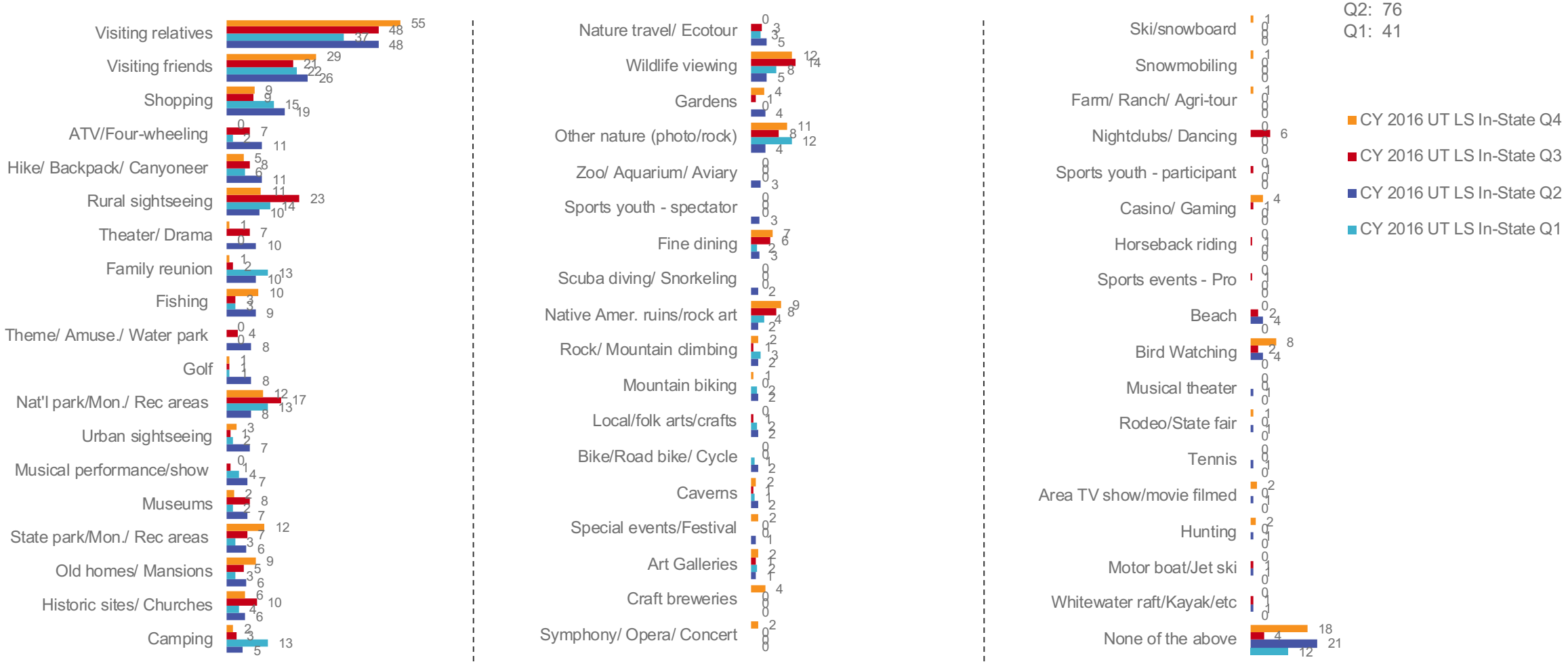
Q4h. When you visited (state) during trip/ month, please check all of the following activities did/attractions visited. (State Level-demo wtd)

Note: LS = Leisure

In-state vacation activities/attractions by CY 2016 quarter

Activities Participated/Attractions Visited by Leisure Visitors
% Participated/Visited – Ranked by 2016 Utah In-State Visitors (1%+)

Sample by quarter (unweighted):
Q4: 56
Q3: 60
Q2: 76
Q1: 41



Note: LS = Leisure

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

Leisure vs. business; day vs. overnighter

- Leisure travelers more often drive, travel with others, and spend less time in hotels/motels than business travelers. With extra time, overnighters visit, play, and enjoy outdoor recreation more than day-trippers.

UTAH VISITORS Trip Choices (Trip Level)	Total UT 2015	Total UT 2016	Leisure 2016	Business 2016	Day Trip 2016	Overnight 2016
PRIMARY TRIP PURPOSE						
NET Leisure/Personal	79%	77%	100%	-	63%	81%
Visit Friends/Relatives	43	40	52	-	34	42
Entertainment/Sightsee	13	12	16	-	10	13
Outdoor Recreation	11	12	15	-	2	15
Business	6	9	-	100	4	10
Personal Bs/Other	15	15	-	-	33	9
PRIMARY MODE						
% Own Auto/Truck*	74%	76%	78%	35%	95%	70%
% Air Travel	14	10	10	19	1	12
AVG # IN TRAVEL PARTY	3.0	2.8	2.9	1.8	2.7	2.8
% Traveling Solo	15%	21	17	67	19	21
% Traveling With Children	34	33	38	12	29	35

UTAH VISITORS Lodging (State Level)	Total UT 2015	Total UT 2016	Leisure 2016	Business 2016	Day Trip 2016	Overnight 2016
AVG # NIGHTS (if any)	3.7	3.8	3.8	4.4	-	3.8
Private Home	1.7	1.3	1.4	0.2	-	1.3
Hotel/Motel	1.1	1.1	1.0	2.5	-	1.1
RV/Tent	0.4	0.6	0.5	1.8	-	0.6
All Other	0.5	0.8	0.9	0.0	-	0.8

*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).

Out-of-state visitors stay longer and buy more hotel nights than in-state visitors

- More lucrative, out-of-state visitors nearly double the rate of in-staters in choosing entertainment and sightseeing.

UTAH VISITORS CY 2016 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	75%	79%	-	-	100%	100%
Visit Friends/Relatives	42	38	-	-	58	48
Entertainment/Sightsee	8	17	-	-	8	21
Outdoor Recreation	10	14	-	-	17	19
Business	7	10	100	100	-	-
Personal Bs/Other	19	10	-	-	-	-
PRIMARY MODE						
% Own Auto/Truck*	89%	62%	50%	24%	92%	64%
% Air Travel	1	19	-	33	1	19
AVG # IN TRAVEL PARTY	2.9	2.7	1.9	1.7	3.2	2.8
% Traveling Solo	21%	21%	71%	65%	17%	16%
% Traveling With Children	35	32	20	8	47	33

UTAH VISITORS CY 2016 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)	2.9	4.5	5.5	3.7	2.7	4.5
Private Home	1.1	1.5	0.2	0.2	1.3	1.4
Hotel/Motel	0.6	1.5	1.4	3.3	0.6	1.3
RV/Tent	0.7	0.6	4.0	0.1	0.4	0.7
All Other	0.5	0.9	0.0	0.0	0.4	1.1

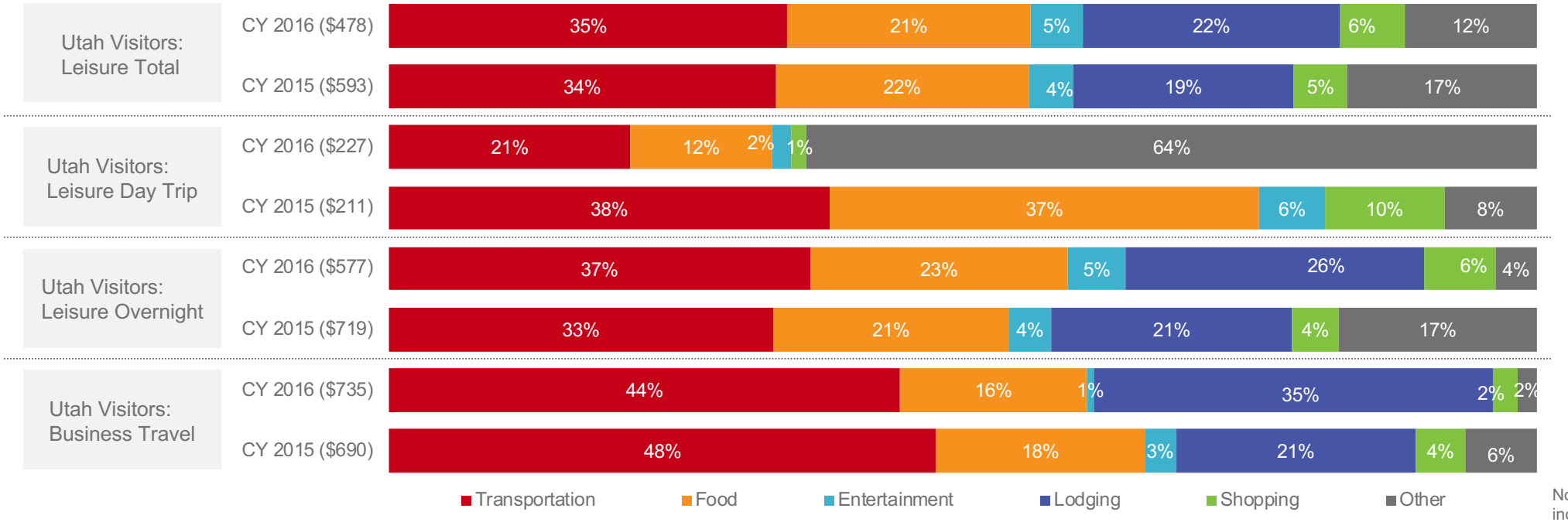
*Auto/Truck only; does not include camper/RV, bus, train, motorcycle, or other
Q1b: Which was the primary purpose of trip?
Q2b: Which was the primary mode of transportation?
Q3a: Please indicate number of travel party members (including yourself) under 18 and 18+. (Trip Level – demo wtd)
Q4f: Please specify the number of nights stayed at each listed accommodation (State Level – demo wtd).

LS=Leisure
O/N = Overnight

Leisure visitors spend less per travel party than last year

- Business spending climbs from last year while leisure overnight spending slips (consistent with the rise in in-state visitors).

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



		Per Person in Travel Party: All Travelers	Per Person in Travel Party: Household Only
Utah Visitors: Leisure Total	CY 2016 ($478)	$164	$195
	CY 2015 ($593)	$197	$235
Utah Visitors: Leisure Day Trip	CY 2016 ($227)	$79	$85
	CY 2015 ($211)	$72	$78
Utah Visitors: Leisure Overnight	CY 2016 ($577)	$198	$241
	CY 2015 ($719)	$237	$288
Utah Visitors: Business Travel	CY 2016 ($735)	$415	$474
	CY 2015 ($690)	$237	$359

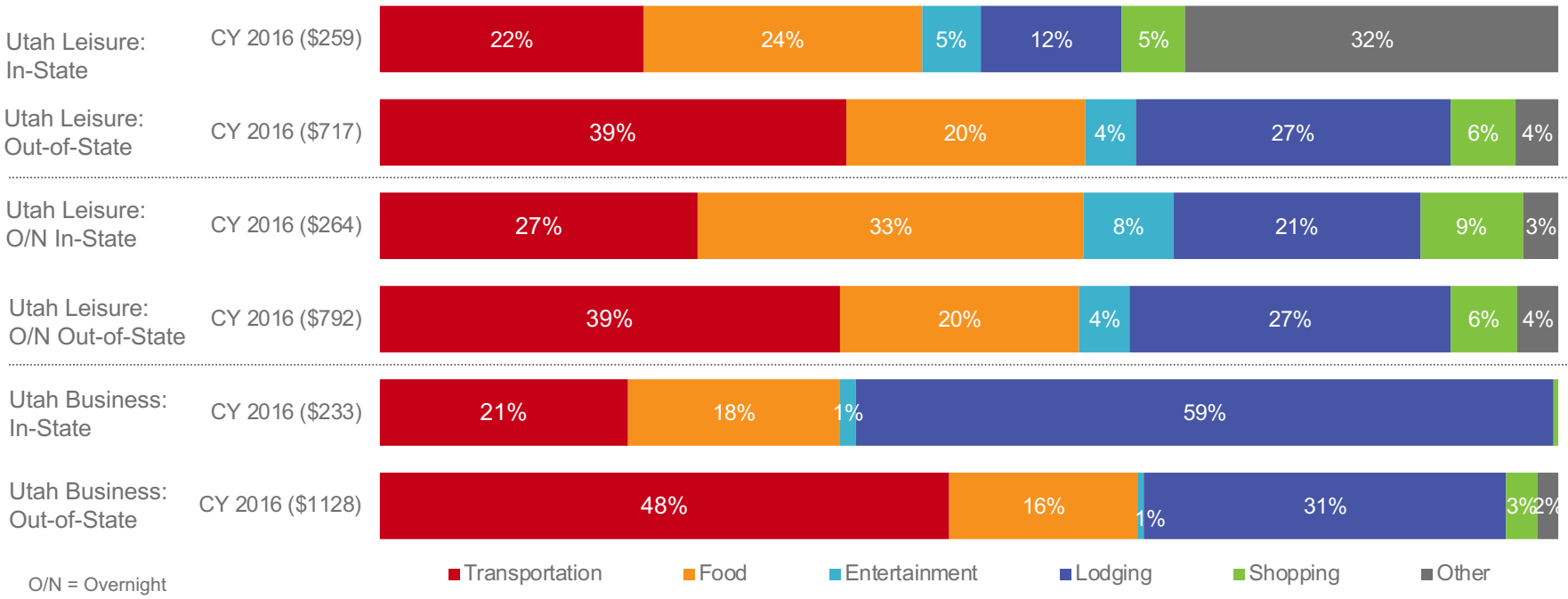
Note: Leisure travel party spending may include those outside a household who travel with you, while business travel spending is unlikely to include those outside your household; thus showing both ways.

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)

Out-of-state visitors spend much more than residents

- That spending gap illustrates the value of enticing out-of-staters (who more likely stay overnight) to visit.

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



O/N = Overnight

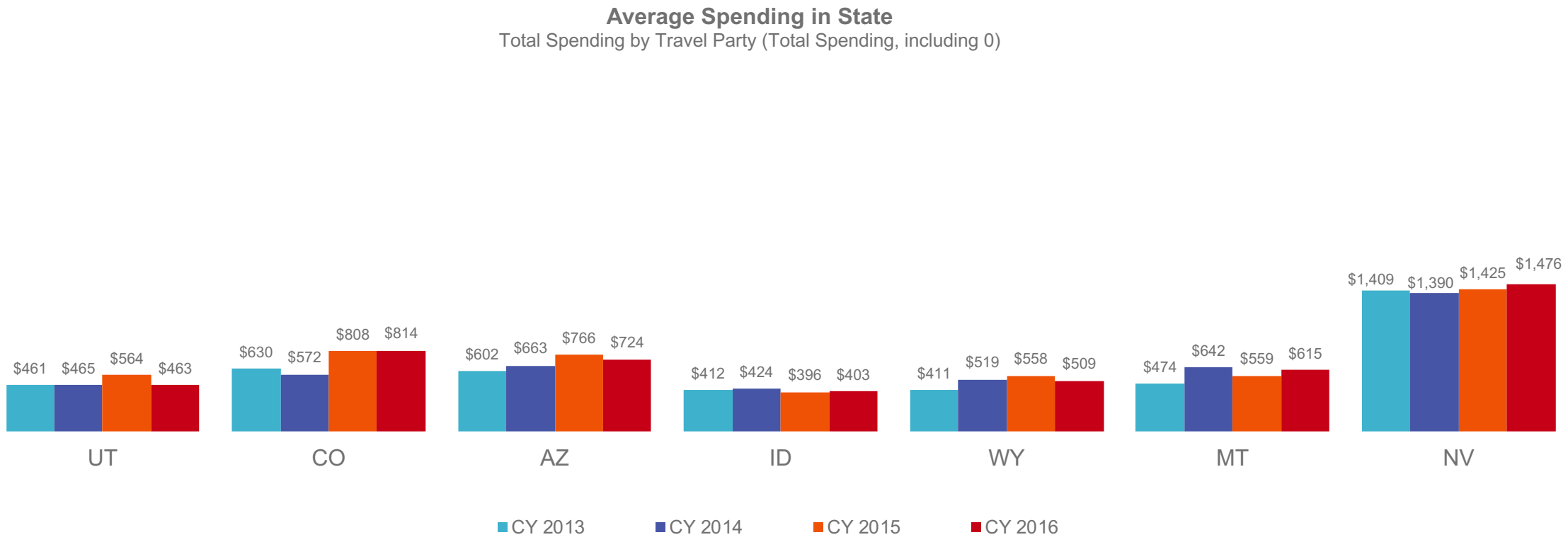
		Per Person in Travel Party	
		All Travelers	Household Only
Utah Leisure: In-State	CY 2016 ($259)	$86	$101
Utah Leisure: Out-of-State	CY 2016 ($717)	$256	$308
Utah Leisure: O/N In-State	CY 2016 ($264)	$82	$101
Utah Leisure: O/N Out-of-State	CY 2016 ($792)	$286	$344
Utah Business: In-State	CY 2016 ($233)	$121	$125
Utah Business: Out-of-State	CY 2016 ($1128)	$684	$855

Note: Leisure travel party spending may include those outside a household who travel with you, while business travel spending is unlikely to include those outside your household; thus showing both ways.

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)

Utah visitors spend amounts similar to nearby rural competitors

- Utah visitor spending exceeds only Idaho visitors; especially lagging spending in states with more urban activities available, such as Colorado, Arizona, and most notably, Nevada (with its gaming).

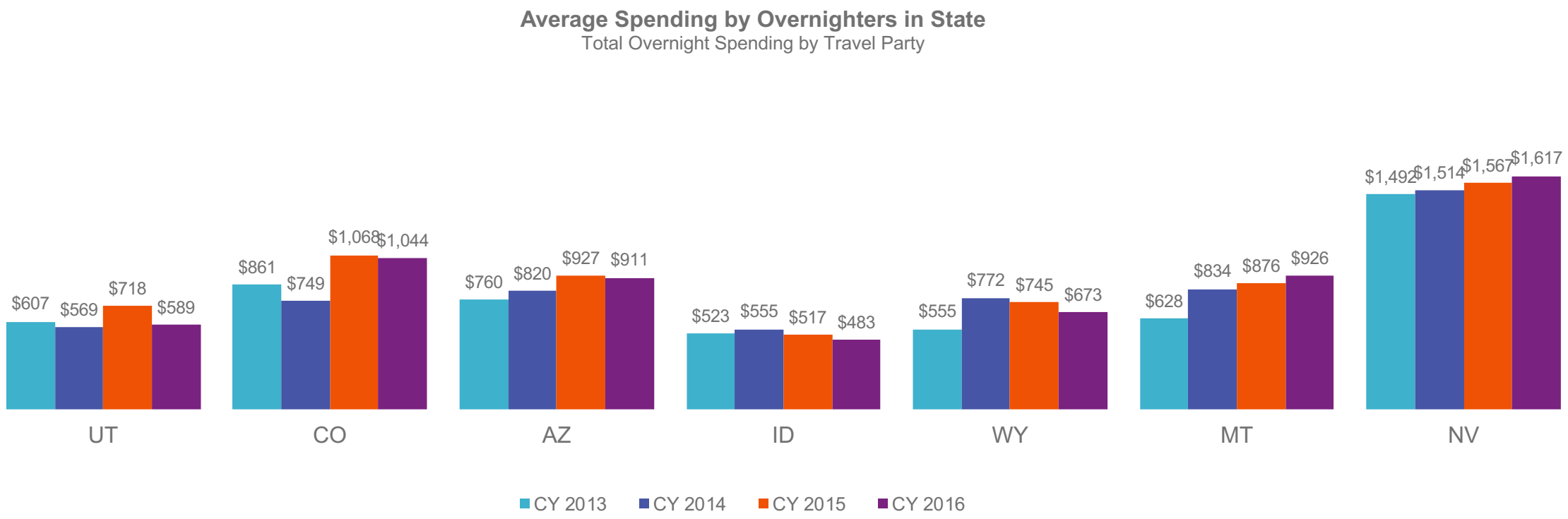


Q4g. Please indicate the total dollar amount spent by your travel party (all) in (State) for . . . (State Level-demo wtd)
(Includes those not specifying leisure vs. business trips)

Wyoming adjusted for some outliers

Utah overnight visitors spend more than those in Idaho, but lags the other competitive states

- Only Montana and Nevada post increased spending in CY 2016 from CY 2015.



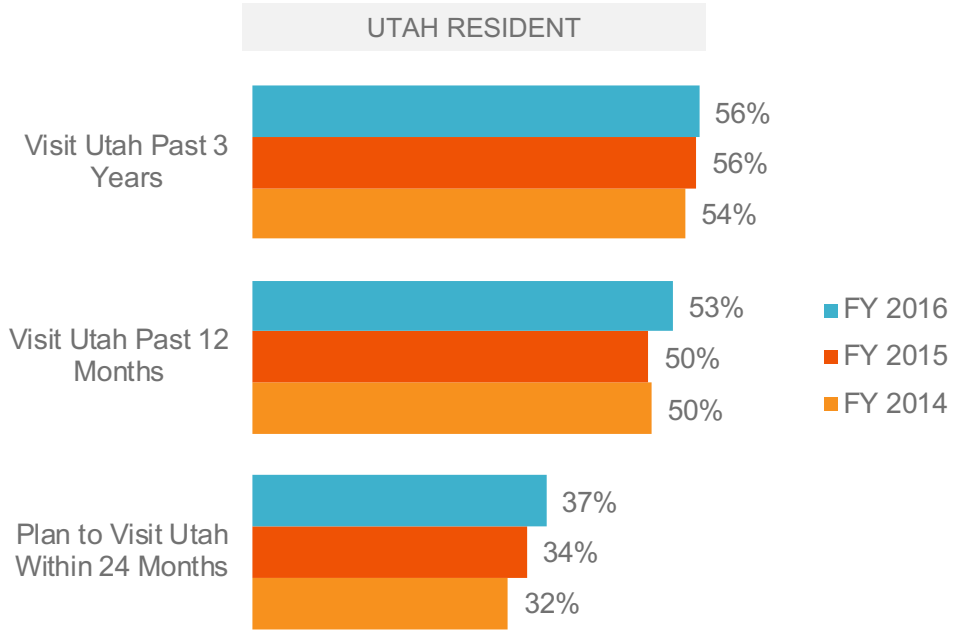
Q4g. Please indicate the total dollar amount spent by your travel party (all) in (State) for . . . (State Level-demo wtd)
(Includes those not specifying leisure vs. business trips)

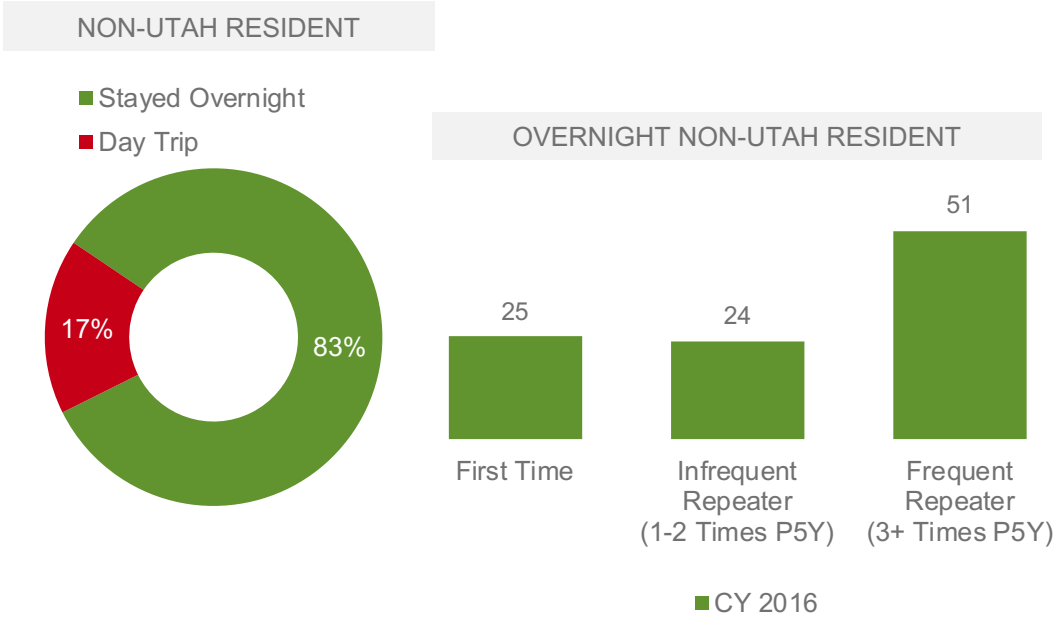
8
Competitive Environment

Utah draws a large share of visitors from residents

- Over half of in-state travelers vacationed in Utah within the past three years
- More than a third of in-state travelers place Utah on their near-term future itinerary
- Half of non-resident visitors return frequently.

Visitation Patterns for Utah





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)

Q4E. Was this visit to Utah a first visit or repeat visit?
Q4E2: Have visited once or twice before in the past 5 years.
Q4E3: Have visited 3+ times in past 5 years.

Salt Lake City ranks as the top Utah destination, especially for visitors from out-of-state

- While still the leading destination, by far, out-of-staters less likely include Salt Lake City than in the past.

Top Utah Destinations

% Utah Visitors Selecting Area (ranked by CY 2016)

All Utah Visitors	CY 2014	CY 2015	CY 2016	Utah Residents	CY 2014	CY 2015	CY 2016	Non-Utah Residents	CY 2014	CY 2015	CY 2016
Salt Lake City	36%	36%	30%	Salt Lake City	23%	26%	25%	Salt Lake City	49%	45%	36%
Provo/Orem	14	14	19	Provo/Orem	10	14	23	Provo/Orem	17	15	15
St. George	18	14	13	St. George	22	14	13	Moab	10	12	14
Moab	6	8	9	Ogden	6	5	9	St. George	14	13	14
Zion/Springdale	6	9	8	Park City	5	6	5	Zion/Springdale	9	13	14
Ogden	7	9	8	Logan	7	8	5	Bryce Canyon	4	9	11
Park City	5	9	7	Moab	2	4	5	Park City	5	12	10
Logan	6	8	7	Cedar City	9	8	4	Cedar City	10	7	9
Bryce Canyon	3	6	7	Brigham City	2	5	3	Logan	6	9	9
Cedar City	10	8	7	Bryce Canyon	1	3	3	Ogden	8	12	6
Brigham City	2	5	4	Zion/Springdale	2	4	3	Monument Valley Area	1	5	5
Monument Valley Area	1	3	2	Davis County/Lagoon	1	3	2	Brigham City	1	5	4
Davis County/Lagoon	0	3	2	Torrey/Capitol Reef	1	3	2	Kanab	3	2	4
Torrey/Capitol Reef	1	3	2	Vernal	4	2	2	Dutch John/Flaming Gorge	0	1	2
Kanab	2	2	2	Garden City/Bear Lake	0	2	1	Escalante/Boulder	1	4	2
Vernal	2	2	2	Dutch John/Flaming Gorge	1	1	0	Torrey/Capitol Reef	1	3	1
Dutch John/Flaming Gorge	0	1	1	Monument Valley Area	0	1	0	Garden City/Bear Lake	1	0	1
Escalante/Boulder	1	3	1	Escalante/Boulder	0	2	0	Davis County/Lagoon	0	2	1
Garden City/Bear Lake	1	1	1	Kanab	0	1	0	Vernal	1	2	1

Note: Respondents may select more than one destination (percentages may sum to more than 100%)
Q4d. Please indicate the cities/places visited in state . . . (State Level – demo wtd.)

Destinations: top visited areas in competitive states – each state has a key city or two:

- Utah: Salt Lake City
- Colorado: Denver
- Arizona: Phoenix
- Idaho: Boise
- Wyoming: Cheyenne and Yellowstone National Park
- Montana: Missoula and Billings
- Nevada: Las Vegas

Top Destinations by State

% Visitors Selecting Area (Each State Ranked)

UT Visitors	CY 2016	CO Visitors	CY 2016	AZ Visitors	CY 2016	ID Visitors	CY 2016	WY Visitors	CY 2016	MT Visitors	CY 2016	NV Visitors	CY 2016
Salt Lake City	30%	Denver Area	41%	Phoenix	33%	Boise Area	29%	Cheyenne	28%	Missoula	21%	Las Vegas	72%
Provo/Orem	19	Lorado Springs	19	Tucson	15	Coeur d' Alene	22	Yellowstone (Park)	24	Billings	18	Reno/Sparks	13
St. George	13	Boulder	12	Flagstaff	15	aho Falls	14	Jackson Hole	19	Bozeman	17	Henderson	8
Moab	9	Estes Park	8	Grand Canyon	13	Pocatello	8	Jackson	12	West Yellowstone	12	Lake Tahoe,	6
Zion/Springdale	8	Fort Ilins	7	Scottsdale	12	Twin Falls	6	Rock Springs	11	Glacier National Park	11	Laughlin	6
Ogden	8	Pueblo	7	Mesa	10	Lewiston	5	Laramie	11	Helena	9	Boulder City	3
Park City	7	Aspen	7	Sedona	9	Sandpoint	4	Casper	10	Great Falls	9	Carson City	3
Logan	7	Grand Junction	7	Tempe	7	McCall	4	Cody	9	Butte	7	Elko	2
Bryce Canyon	7	Durango	6	Glendale	6	Sun Valley	3	Sheridan	6	Havre	5	Pahrump	2
Cedar City	7	Breckenridge	6	Kingman	6	Post Falls	2			Stevensville	2	Battle Mountain	2
Brigham City	4	Vail	5	Prescott	6					Glendive	1	Mesquite	1
Monument Valley Area	2	Steamboat Springs	3	Lake Havasu	5							Virginia City	1

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.)

Geography (residence) impacts destination choices

- Residents have most likely visited UT, CA, NV
- Non-residents place Florida and California at the top of their lists, but those within the region choose California, Nevada, and Texas.

All Travelers	Visited Past 3 Years		Visited Past Year		Plan to Visit Next Two Years	
RESIDE IN UTAH	CY 2015	CY 2016	CY 2015	CY 2016	CY 2015	CY 2016
Visit Utah	56%	56%	50%	53%	34%	37%
Strongest Competitor	53 (CA)	48 (CA)	33 (NV)	31 (NV)	48 (CA)	43 (CA)
Second-Strongest	46 (NV)	44 (NV)	32 (CA)	31 (CA)	28 (NV)	28 (NV)
NON-UTAH RESIDENT						
Visit Utah	5%	5%	3%	3%	4%	3%
Strongest Competitor	34 (FL)	34 (FL)	23 (FL)	23 (FL)	29 (FL)	29 (FL)
Second-Strongest	27 (CA)	27 (CA)	19 (CA)	19 (CA)	22 (CA)	23 (CA)
REGION RESIDENT (UT/CA/AZ/NV/CO/ID/TX/OR/WA)						
Visit Utah	11%	11%	6%	7%	8%	7%
Strongest Competitor	51 (CA)	52 (CA)	41 (CA)	41 (CA)	38 (CA)	38 (CA)
Second-Strongest	28 (NV)	29 (NV)	19 (NV & TX)	19 (NV & TX)	21 (NV)	22 (NV)
REGION RESIDENT (Without UT) (CA/AZ/NV/CO/ID/TX/OR/WA)						
Visit Utah	9%	9%	5%	5%	7%	7%
Strongest Competitor	51 (CA)	52 (CA)	41 (CA)	42 (CA)	38 (CA)	38 (CA)
Second-Strongest	28 (NV)	28 (NV)	19 (TX & NV)	19 (TX & NV)	21 (NV)	22 (NV)

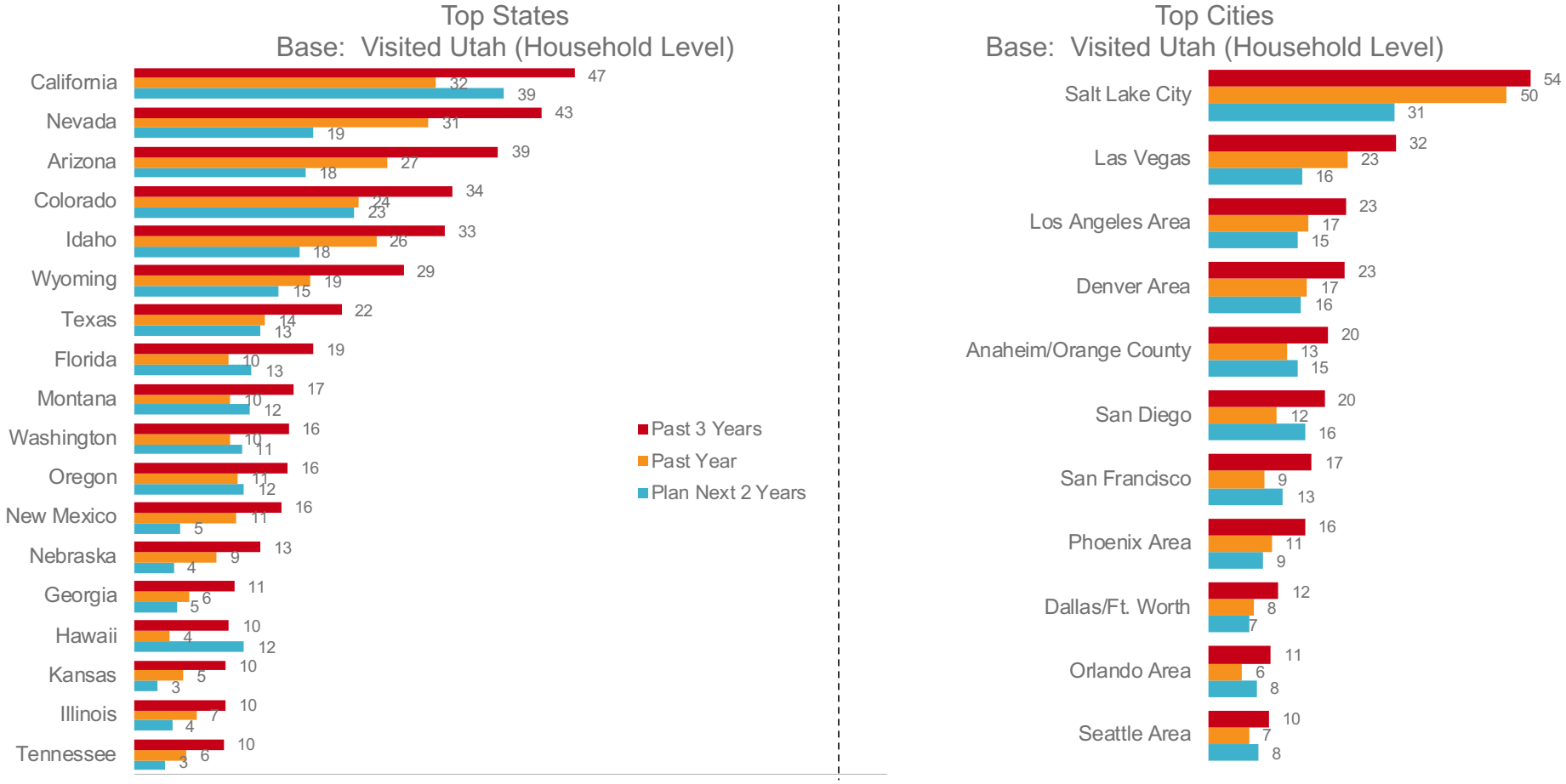
Q7a: Please indicate US states visited for leisure in past three years.
Q7b. Please indicate states visited within the past 12 months.
Q7c: Which US states plan to visit within the next two years for leisure? (Household Level)

Other Western areas dominate the competition with Utah

- The top non-Western state (Florida) ranks eighth; of the top 10 cities, only Orlando places outside the West.

Other Areas Visited by Utah Visitors (Key Competitors)

% Visiting State/DMA Past Three Years (Ranking), Past Year, Planned Next Two Years (10%+)



Q7a: Please indicate US states visited for leisure in past three years.
Q8a: US cities visited past three years.
(Household Level)

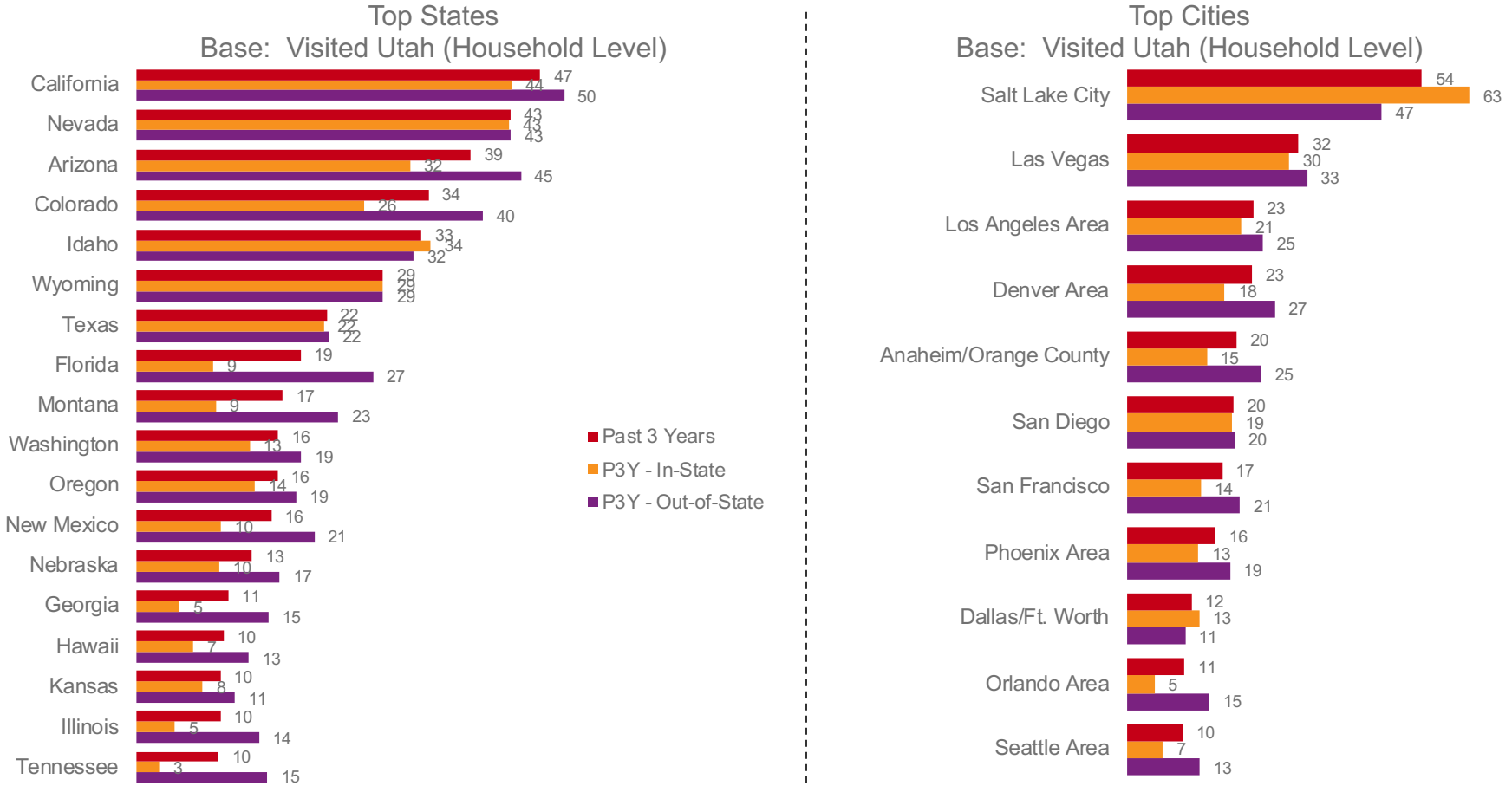
Q7b. US states visited past 12 months.
Q8b. US cities visited past 12 months.

Q7c: US states plan to visit next two years.
Q8c: US cities plan to visit next two years.

California and Nevada = top competitors; others vary by residence

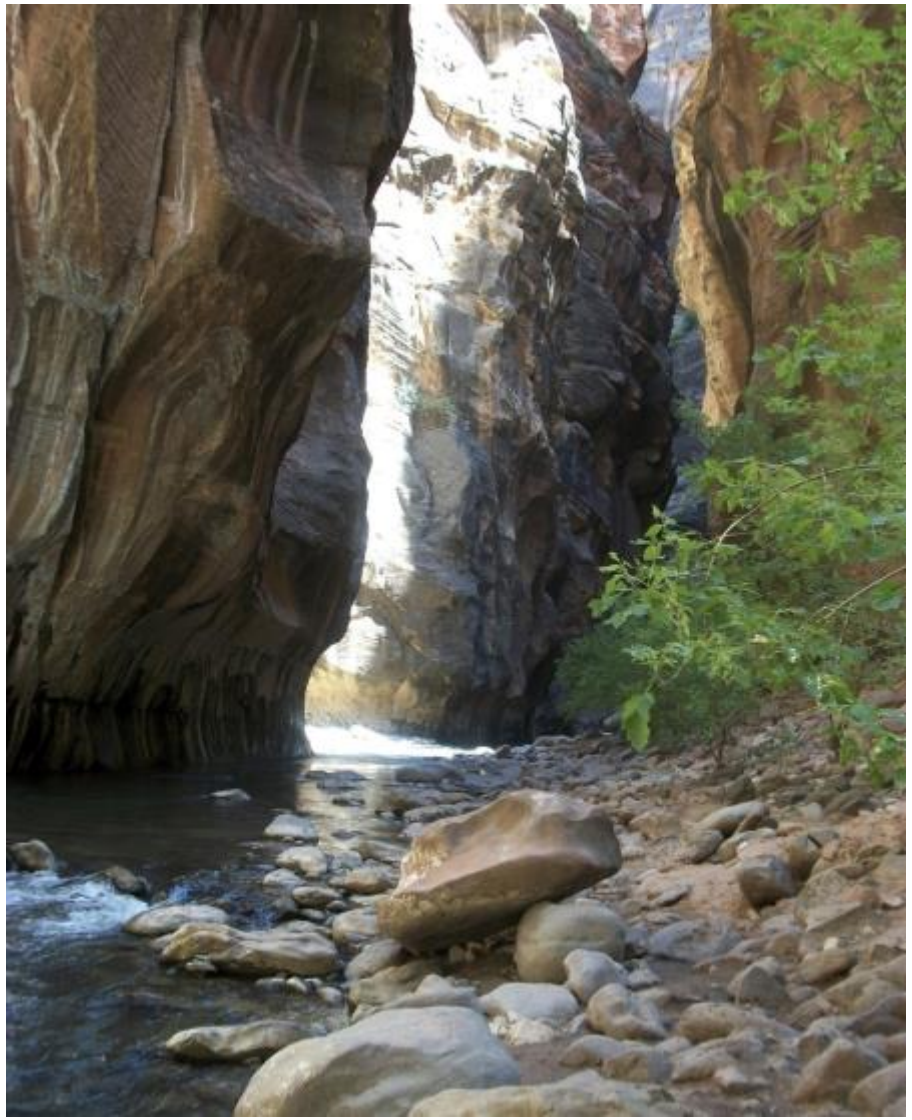
- In-state visitors more likely opt for neighboring Idaho, Arizona, Colorado, and Wyoming; out-of-staters choose a broader variety. SLC dominates city choices, especially among residents; Las Vegas appeals to all.

Other Areas Visited by Utah Visitors in Past 3 Years (Key Competitors)
Past Three Years (Ranking) Total, In-State, Out-of-State (10%+)



Q7a: Please indicate US states visited for leisure in past three years.
Q8a: US cities visited past three years.

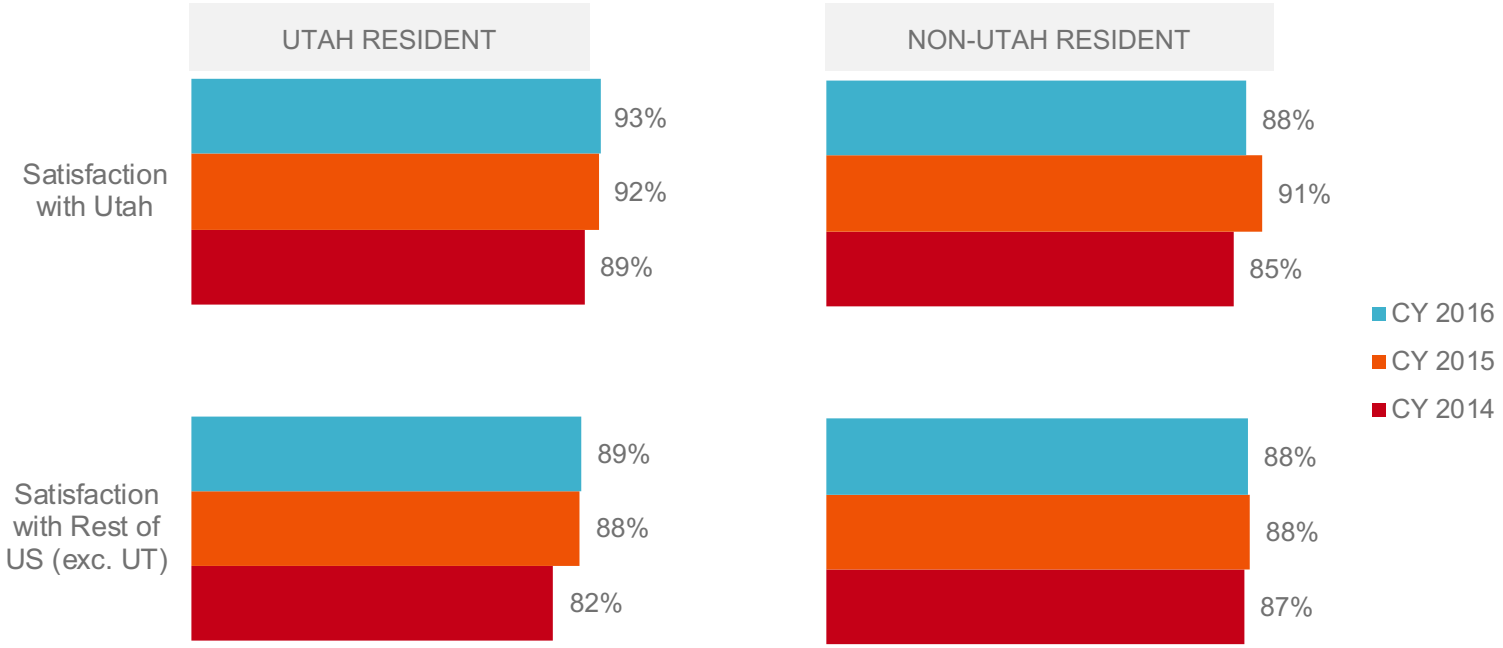
9
Satisfaction



Utah sends most visitors home happy

- While nearly all visitors praise their Utah visit, out-of-staters slip slightly, but their praise remains above two years ago
- In-staters view Utah more favorably than they do the rest of the US; out-of-staters assign equal satisfaction.

Extremely/Very Satisfied With Trip to State or Rest of US

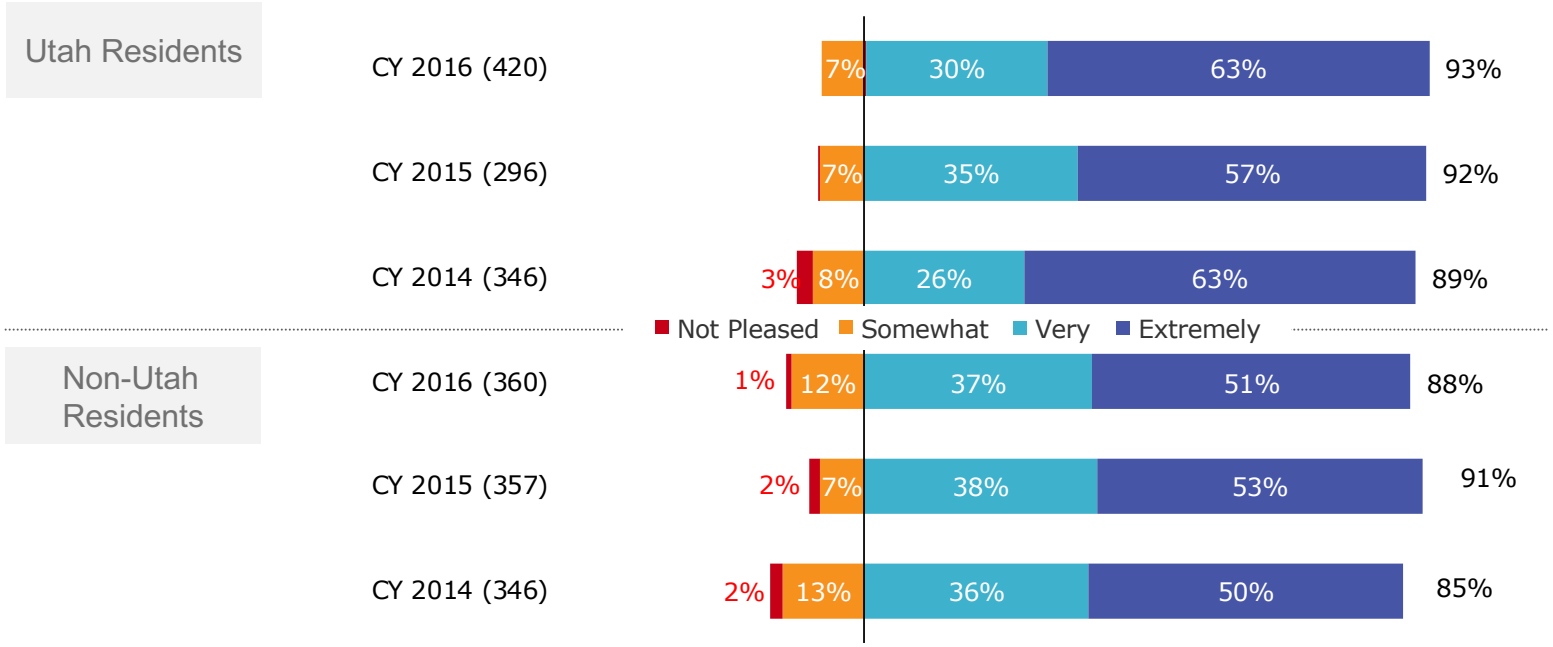


Q4l: Using a scale of 1-5 (5=extremely satisfied), please indicate satisfaction with (area indicated at far left). (State Level – demo wtd.)

Utah maintains high satisfaction in 2016

- In addition to a higher share of satisfied visitors, residents also note a stronger emphasis on satisfaction than out-of-state visitors (in other words, more are *extremely satisfied* rather than just *very satisfied*).

Satisfaction with Utah Visit
By Group (Base)



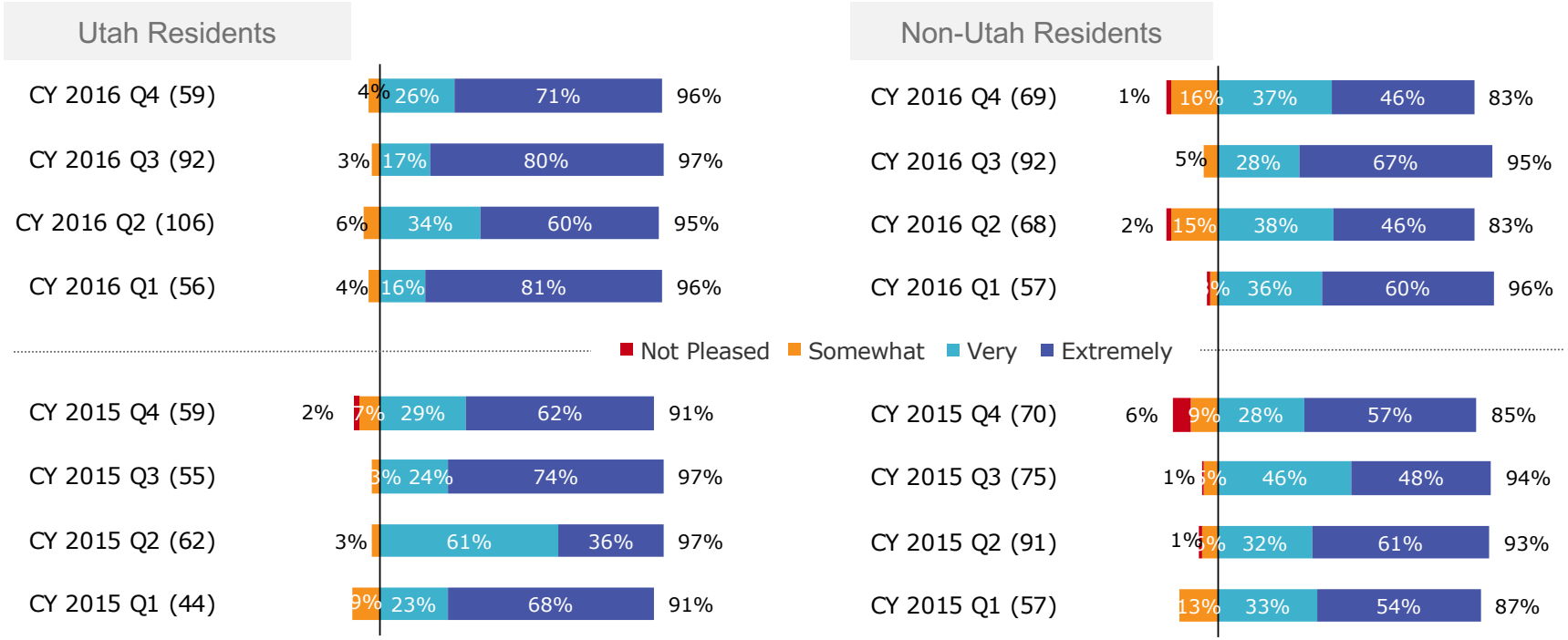
*Note: Not pleased includes *Not At All* and *Not Very Pleased*

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

Isolating just leisure visitors, Utah still yields high satisfaction throughout the year

- In-state leisure visitors usually note stronger satisfaction than non-residents.

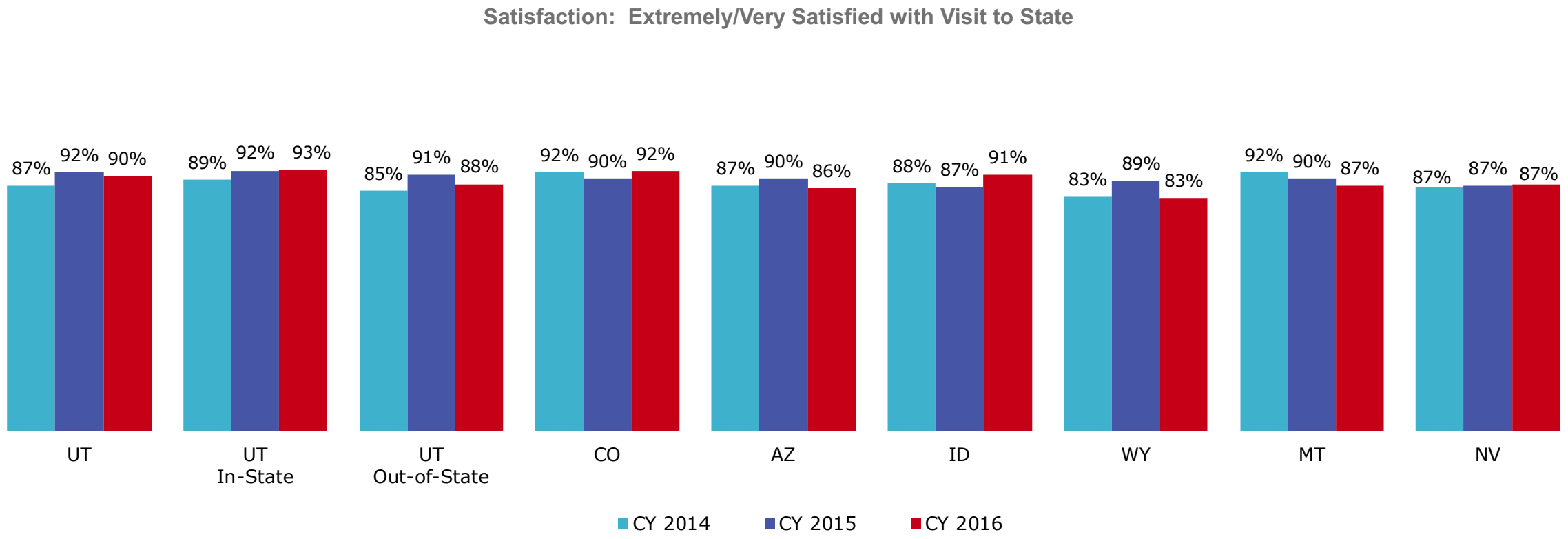
Satisfaction with Utah Leisure Visit By Group (Base)



*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 (area indicated at far left). (State Level – demo wtd.)

Utah and competitors remain highly rated

- Utah, Colorado, and Idaho boast the highest satisfaction in 2016; Wyoming lags the group.

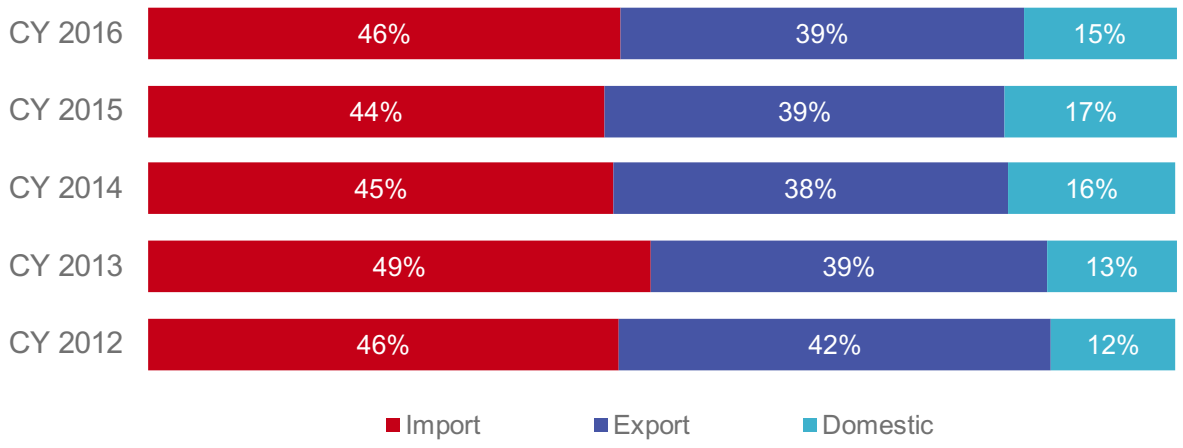


Q4l: Using a scale of 1-5 (5=extremely satisfied), please indicate satisfaction with … (State Level-demo wtd.)

10
Export/Import

Export/import "Balance of Trade" remains in place

- Utah continues to import 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.*



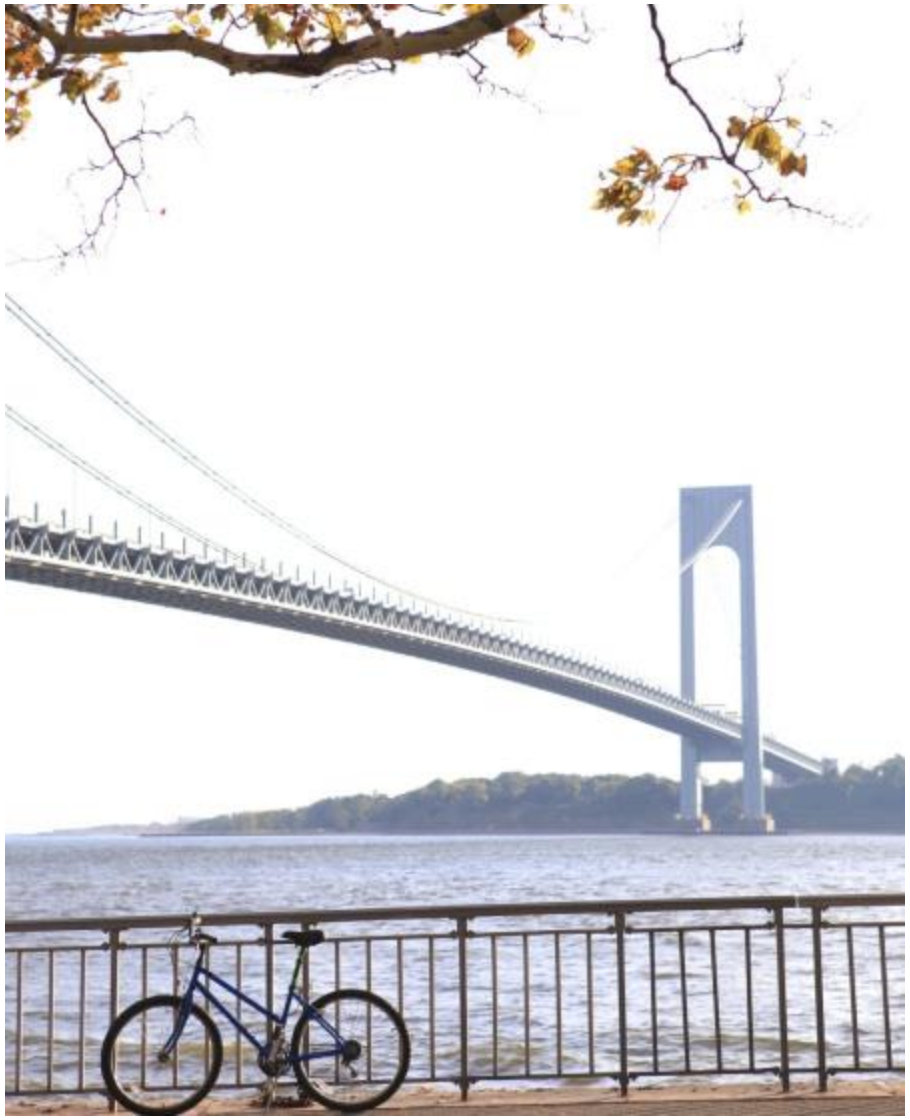
Import represents $ leaving UT

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
Demographics



Utah visitors earn somewhat less than average US travelers and are more likely Caucasian

- Separately, compared to out-of-state visitors, in-state visitors are younger, more likely living in families (3+ in household), even more likely Caucasian, and less affluent.

Demographics	All US Travelers 2015	All US Travelers 2016	Utah Visitors Total 2015	Utah Visitors Total 2016	Utah In-State Visitors CY 2015	Utah In-State Visitors CY 2016	Utah Out-of-State Visitors CY 2015	Utah Out-of-State Visitors CY 2016
Average Age	46	46	44	46	42	45	45	46
Average Household Income	$76,800	$80,600	$74,600	$70,000	$68,700	$54,500	$78,800	$83,000
% Male	32%	31%	33%	28%	37%	27%	31%	29%
% Married	61	60	70	70	72	73	69	68
Household Composition								
% One Person	16	16	11	14	12	14	10	14
% Two People	39	38	38	39	30	36	44	41
% Three or More	45	46	51	47	58	51	47	44
Ethnicity								
% Caucasian	84	84	91	92	98	95	86	89
% African-American	7	7	1	1	0	0	2	2
% Spanish Origin	8	8	5	4	2	4	7	4

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

Overnighters and out-of-state visitors report higher incomes

- Otherwise, overnighters generally share similar characteristics as day-trippers
- More out-of-state leisure visitors travel in pairs, impacting activity choices, while their higher incomes boost spending in Utah.

Demographics	Utah Visitors Total 2016	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	46	45	45	46	45	43	47
Average Household Income	$70,000	$71,300	$73,700	$59,800	$73,800	$58,500	$83,600
% Male	28%	29%	36%	29%	28%	29%	29%
% Married	70	69	73	76	68	74	65
Household Composition							
% One Person	14	14	14	15	14	10	16
% Two People	39	39	28	34	40	38	45
% Three or More	47	47	58	51	46	52	40
Ethnicity							
% Caucasian	92	90	94	94	91	94	88
% African-American	1	1	-	1	1	1	2
% Spanish Origin	4	4	5	3	4	5	3

LS=Leisure
O/N = Overnight

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

Visitor demographics vary by state, especially income

- Nevada does the best job of attracting out-of-state visitors (43% from California) while Utah, Colorado, and Montana rely more heavily on in-state travelers (46%, 43%, 43%, respectively).

Demographics	Utah Visitors CY 2016	Colorado Visitors CY 2016	Arizona Visitors CY 2016	Idaho Visitors CY 2016	Wyoming Visitors CY 2016	Montana Visitors CY 2016	Nevada Visitors CY 2016
Average Age	46	45	47	48	46	48	47
Average Household Income	$70,000	$88,000	$87,000	$74,900	$73,800	$67,800	$95,800
% Male	28%	28%	36%	22%	26%	35%	33%
% Married	70	64	65	66	61	64	59
% In-State Visitor	46	43	36	36	19	43	6
Household Composition							
% One Person	14	14	13	12	17	19	15
% Two People	39	39	43	48	37	45	44
% Three or More	47	48	44	40	46	36	41
Ethnicity							
% Caucasian	92	92	86	96	93	92	79
% African-American	1	2	4	1	2	1	5
% Spanish Origin	4	8	10	3	5	4	10
Total Households (Census)	906,292	2,024,468	2,412,212	589,320	226,865	409,394	1,016,709

Census: http://quickfacts.census.gov/qfd/index.html
Panel: Age, Income, Children, Ethnicity. (Household Level – demo wtd)

12

Background and Research Methods

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
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 2016.

Type of activity summary

Art & Culture	Art galleries, historic sites/churches, museums, musical theater, Native American ruins/Rock art, Local/folk arts/crafts (Amish, Native American, etc.), old homes/mansions, theater/drama, symphony/opera/concert, musical performance/show
Adventure Sports	Hang glide/skydive/base jump, hike/backpack/canyoneer, mountain bike, rock/mountain climb, scuba dive/snorkel, ski/snowboard (cross country or downhill), water ski, whitewater raft/kayak/canoe/paddleboard
Sports and Recreation	ATV/Four-wheel, bike, fish, golf, horserace, horseback ride, hunt, motor sports (NASCAR/Indy), motor boat/jet ski, sail, snowmobile, snow sports other than ski/snowmobile, sports event – major/pro, sports events - youth/amateur/collegiate as spectator, sports events – youth/amateur/collegiate as participant, tennis
Nature/ Outdoor Activities	Beaches, bird watch, camp, caverns, nature travel/ecotour, wildlife view, zoos/aquariums/ aviaries, farms/ranches/agri-tours, Other nature (photography, rockhound, etc.)
Entertainment/Amusement	Casino/gaming, fine dining, nightclubs/dancing, rodeo/state fair, shop, spa/health club, special events (e.g., Mardi Gras, hot air balloon races), theme/amusement/water park, wine taste/ winery tour, craft breweries, distilleries
Family Activities/Reunions	Family reunions, high school/college reunions, visit friends, visit relatives
Sightsee	Rural sightsee, urban sightsee, see area where a TV show or movie was filmed
Parks and Gardens	Gardens, state park/monuments/recreation areas, national park/monuments/recreation areas

Research methods

DATA COLLECTION PROCESS

- For TravelsAmerica, TNS uses its Lightspeed panel and panel partners to field monthly e-mail invitations to representative households
- 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 travel party size for each household as well

Utah Visitors and Total Travelers For Calendar Year ending December 31, 2016

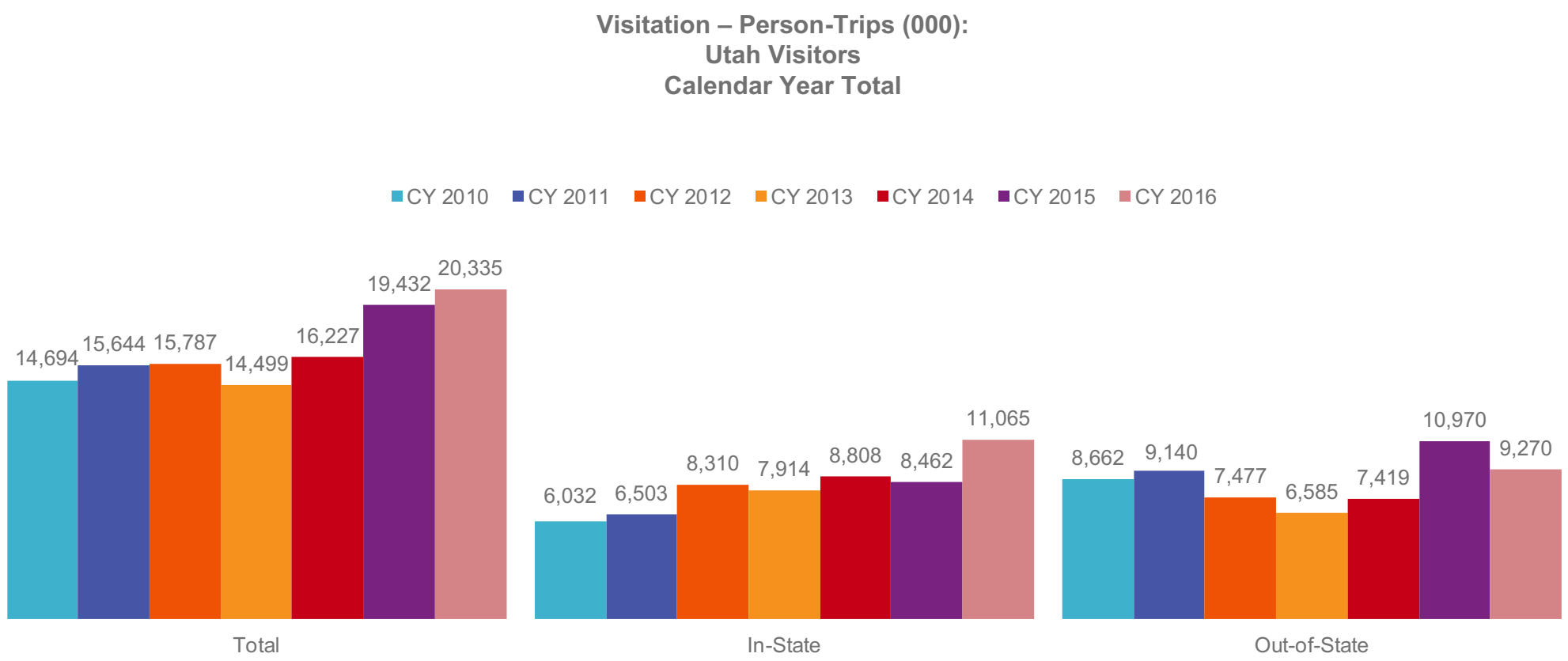
CY 2015 Travelers (Unweighted Respondents)	CY 2016 Travelers (Unweighted Respondents)	CY 2015 Travelers (Weighted by Demographics)	CY 2016 Travelers (Weighted by Demographics)	Region
579	568	572	695	Utah Residents (Q1a)
683	694	707	829	Utah Visitor Households (Q4a)
61,030	57,930	62,808	58,792	Total for TravelsAmerica

Thank You

John.packer@tnsglobal.com

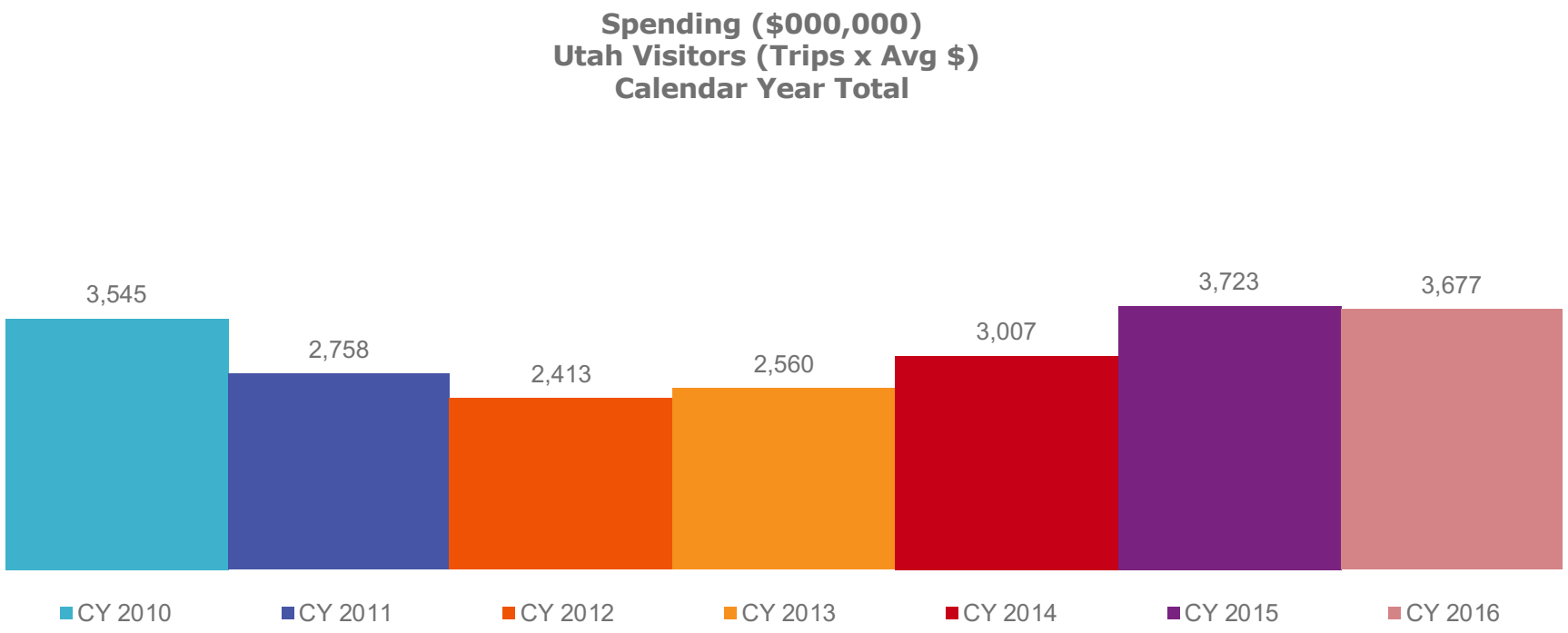
Additional Data and Case Study

Person-trips by residence: 2010 - 2016
(trips = 50+ miles from home (one-way) or spent 1+ nights)



Q4a. Please indicate US state(s) visited state level

Spending: 2010 - 2016
(trips = 50+ miles from home (one-way) or spent 1+ nights)



Q4a. Please indicate US state(s) visited state level

Case study: TNS Custom Targets for TravelNevada deliver significant lift in site conversions

Business issue

Our client, TravelNevada, wanted to increase leads and conversions through an online ad campaign.

Precise action

TravelNevada used TNS Digital Segment Targeting, powered by our Custom Research Targets, to reach the right consumers with the campaign – those willing to travel to Nevada in the future.

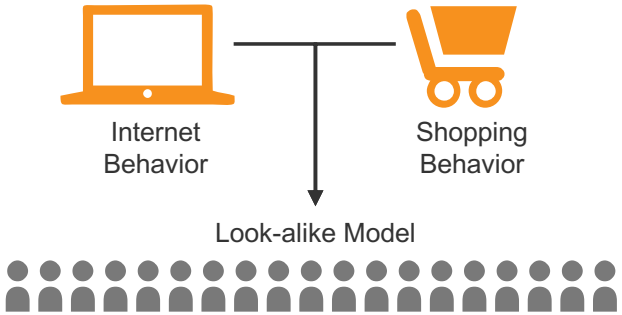
Additionally, TravelNevada was first in the tourism/hospitality industry to make use of Digital Segment Targeting – reaching a precise audience at scale, based on mindset.

NEVĂDA
A WORLD WITHIN.
A STATE APART.

Case study: Executing Travel Nevada's campaign

1 TNS custom research identified consumers willing to travel to Nevada

2 The audience was scaled by a leading Data Management Platform (DMP) to find 15 million similar consumers through a look-alike model



3 The 15 million unique cookies were added to the media plan and targeted directly

Result

The campaign delivered a conversion rate that was 26% greater than standard display ad targeting*

The campaign was tracked by a 3rd party media agency. The TNS campaign impact was measured by comparing TNS targeting conversion rate vs. other targeting methods on the same platform. Both target audiences shared identical traits (e.g. demos, ad frequency and messaging, metro areas, etc.).