

# Utah Visitor Profile & Insights

## Calendar Year 2023 Report

Prepared for Utah Office of Tourism | April 2024

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# Key Takeaways

Pulled down by a decrease in out-of-state travelers visiting friends and relatives, Utah's total visitor volume eased slightly (-3%) in CY 2023 to 14.6 million. While overall in-state and discretionary leisure out-of-state travelers (e.g., *Adventure Seekers*, *Outdoor Recreationalists*) posted year-over-year gains, this growth was more than offset by the downturn in VFR travelers from outside Utah's borders.

As VFR travel slowed, other top niche activity segments like State/National Parks grew in 2023 - fueling increased visitation to Utah's Mighty 5 and nearby southern cities like Moab, Zion/Springdale, and Bryce Canyon. Those who visit Southern Utah tend to be more satisfied with their trip, travel with more people, and attract a higher proportion of first-time visitors than Northern Utah.

Utah should continue to target discretionary leisure visitors from their niche activity segments, who also happen to be among Utah's most lucrative visitors.



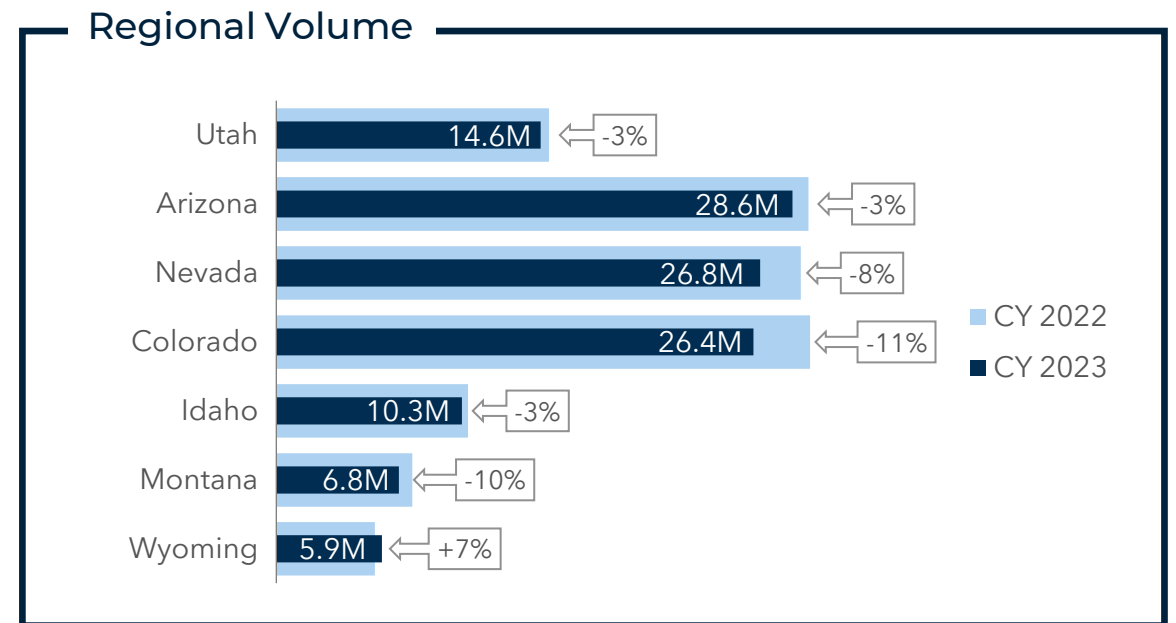
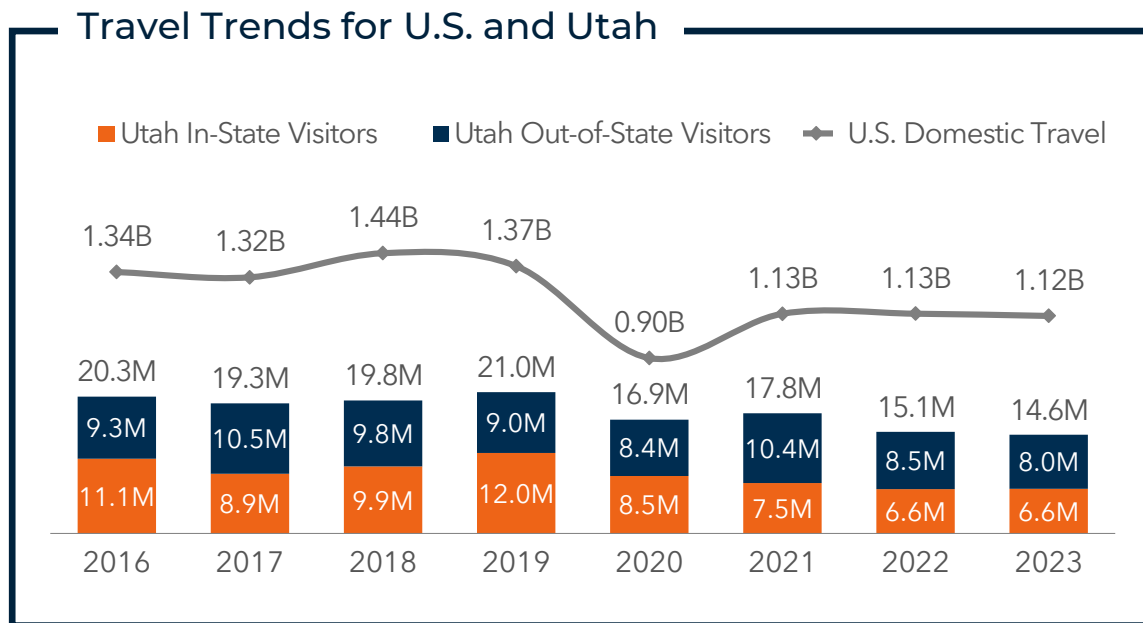


# Executive Summary

# Utah visitor volume contracts, as does overall domestic travel in 2023

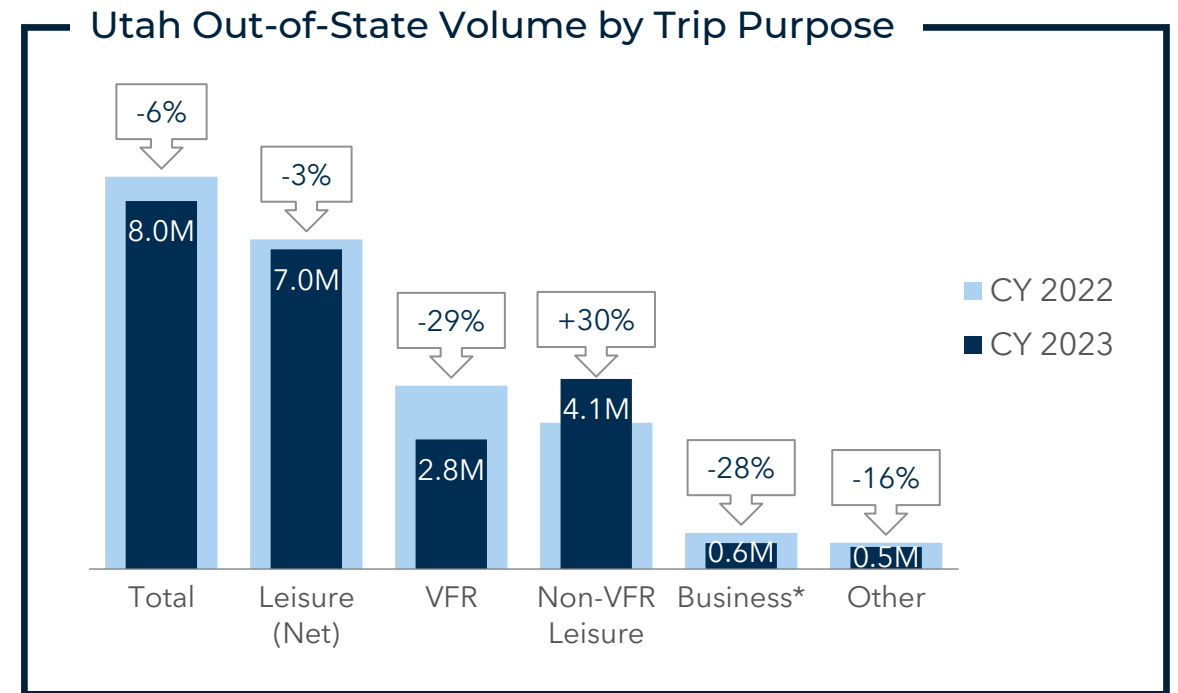
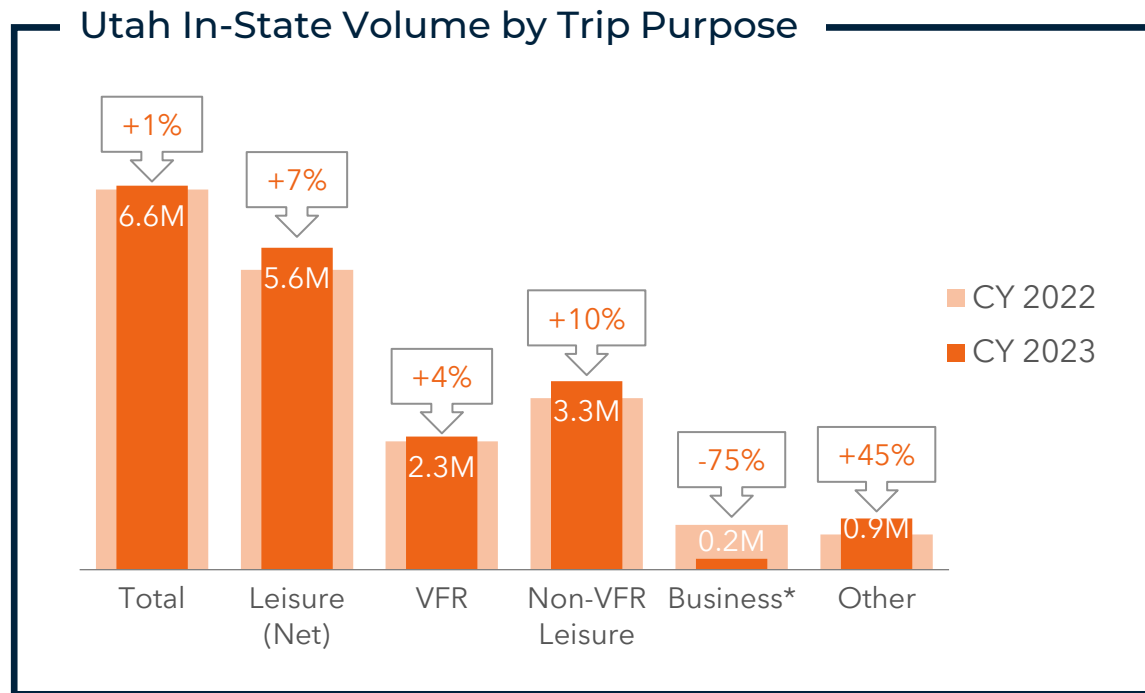
Pulled down by a decrease in out-of-state travelers visiting friends and relatives, Utah's total visitor volume eased slightly lower in CY 2023 to 14.6 million, a -3% decrease from the previous year. During the same period, domestic travel within the United States decreased by 1%. This slight decrease was driven by weaker visitation from out-of-state visitors, which was down 6% from the previous year. At the same time, in-state visitation among Utah residents slightly increased by 1%.

Regionally, apart from Wyoming, each of Utah's regional competitors also experienced visitor volume decreases in CY 2023. Decreases in visitation to Nevada (-8%), Montana (-10%), and Colorado (-11%) all out-paced Utah's decline.



# Non-VFR Leisure visitor volume had double-digit increases compared to the previous year among in-state and out-of-state travelers

Utah's in-state visitor volume had a slight increase compared to the previous year thanks to a 7% increase in leisure visitation. Further, within the leisure visitor segment, non-VFR leisure travel grew 10% from 2022. Among Utah's out-of-state visitors, volume fell short of 2022 due to decreases in the VFR (-29%) and Business (-28%) travel segments. Despite this, Utah attracted more non-VFR leisure travelers from other states than the previous year (+29%).

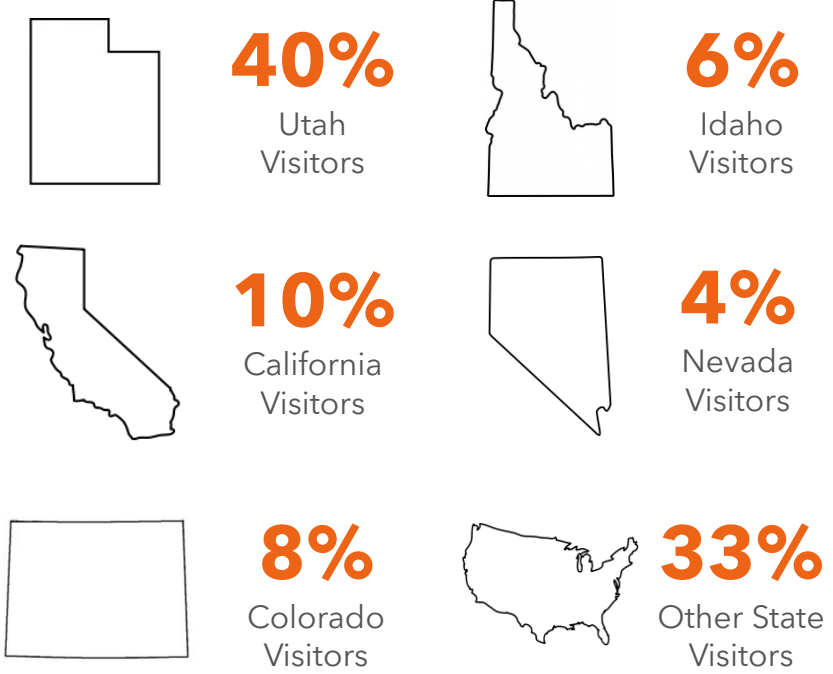


\*Sample Size <30.

# While proximity influences where visitors come from, shifts still occur

Like the previous year, Utah's 2023 visitor base mostly came from within, or from nearby states. However, shifts in visitation from some states still occurred. More visitors came from Colorado than the previous year (8% vs 4%), while fewer residents from California and Idaho took a trip to the state. Likewise, more Utah visitors traveled to the state from Denver (+2 pts), while slightly less came from Phoenix and Las Vegas year-over-year.

## Utah Visitor Source Markets



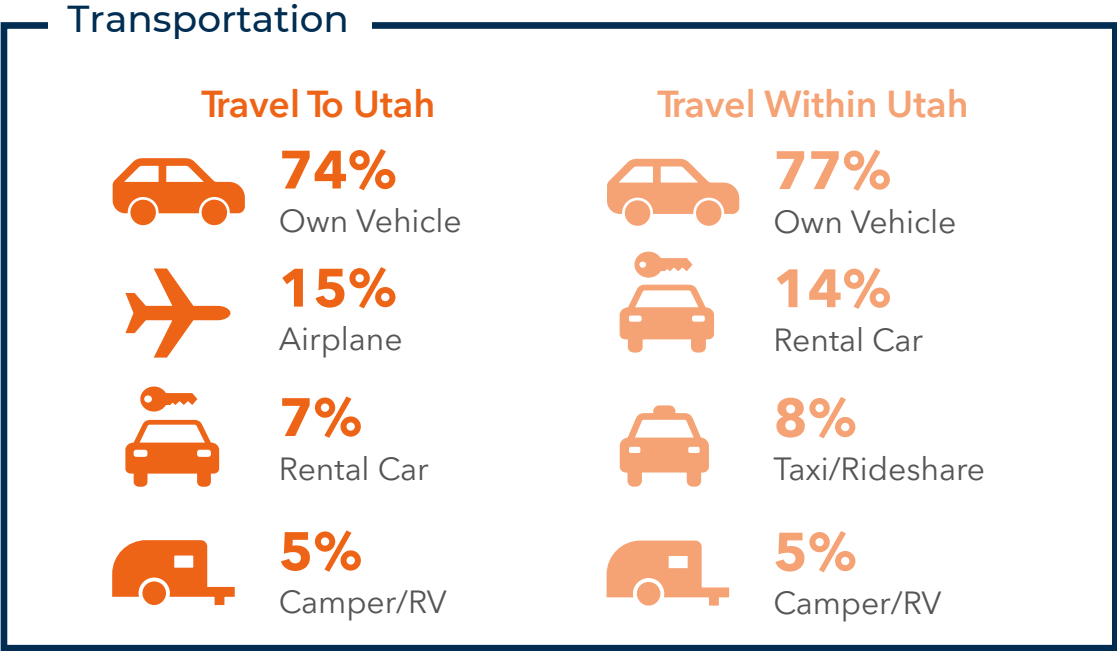
Top Origin DMAs

1	Salt Lake City	<b>42%</b>
2	Denver	<b>6%</b>
3	Los Angeles	<b>5%</b>
4	Phoenix	<b>3%</b>
5	Idaho Falls-Pocatello	<b>3%</b>
6	Las Vegas	<b>3%</b>
7	San Francisco-Oakland	<b>2%</b>








Note: San Francisco-Oakland-San Jose shortened to San Francisco-Oakland.

# Utah destinations featuring iconic natural wonders experienced the greatest gains, while Utah’s largest city remained relatively stable at No. 1

Three-quarters of travelers to Utah arrived in their own vehicle (74%) and 15% flew to their destination. When traveling within the state, own vehicle (77%), rental car (14%), and taxi/rideshare (8%) were the most popular transportation modes. Compared to 2022, visitation to southern Utah destinations such as Moab (+3 pts), Zion/Springdale (+3 pts), and Bryce Canyon (+3 pts) grew. This is likely a result of increased visitation to Utah’s national parks in those areas.



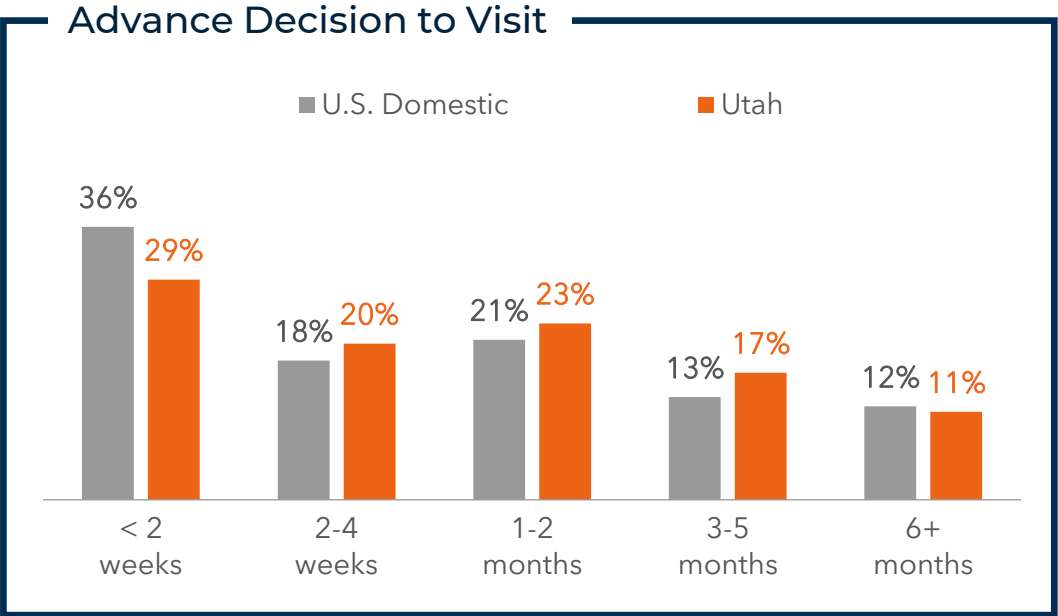
### Top Utah Destinations

	CY 2022	CY 2023
 Salt Lake City	<b>32%</b>	<b>33%</b>
 St. George	<b>14%</b>	<b>15%</b>
 Provo/Orem	<b>14%</b>	<b>14%</b>
 Moab	<b>9%</b>	<b>12%</b>
 Zion/Springdale	<b>7%</b>	<b>10%</b>
 Park City	<b>8%</b>	<b>10%</b>
 Bryce Canyon	<b>6%</b>	<b>9%</b>



# Utah visitors rely on more planning sources than overall U.S. domestic travelers

Approximately half (51%) of Utah visitors made the decision to visit more than a month before their visit, compared to 46% of overall U.S. travelers. Utah visitors were also more likely to use a variety of trip planning sources than domestic travelers. Meanwhile, only 21% of Utah visitors made no plans prior to their trip, while nearly a third of U.S. domestic travelers (29%) said they made no plans prior to traveling.

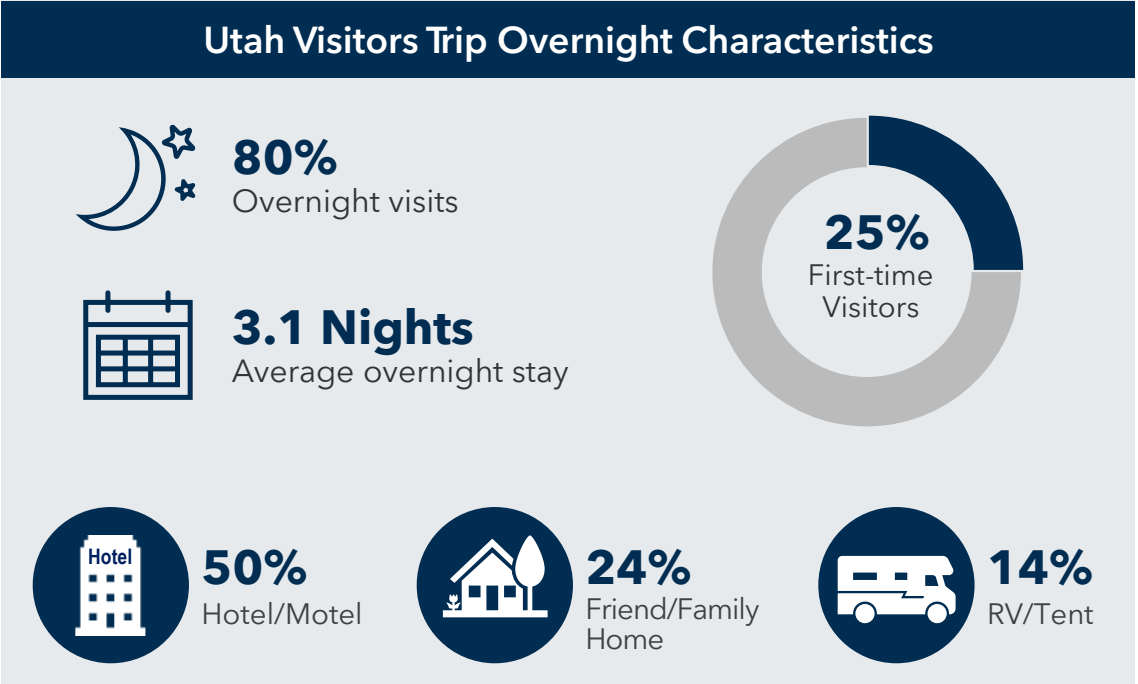
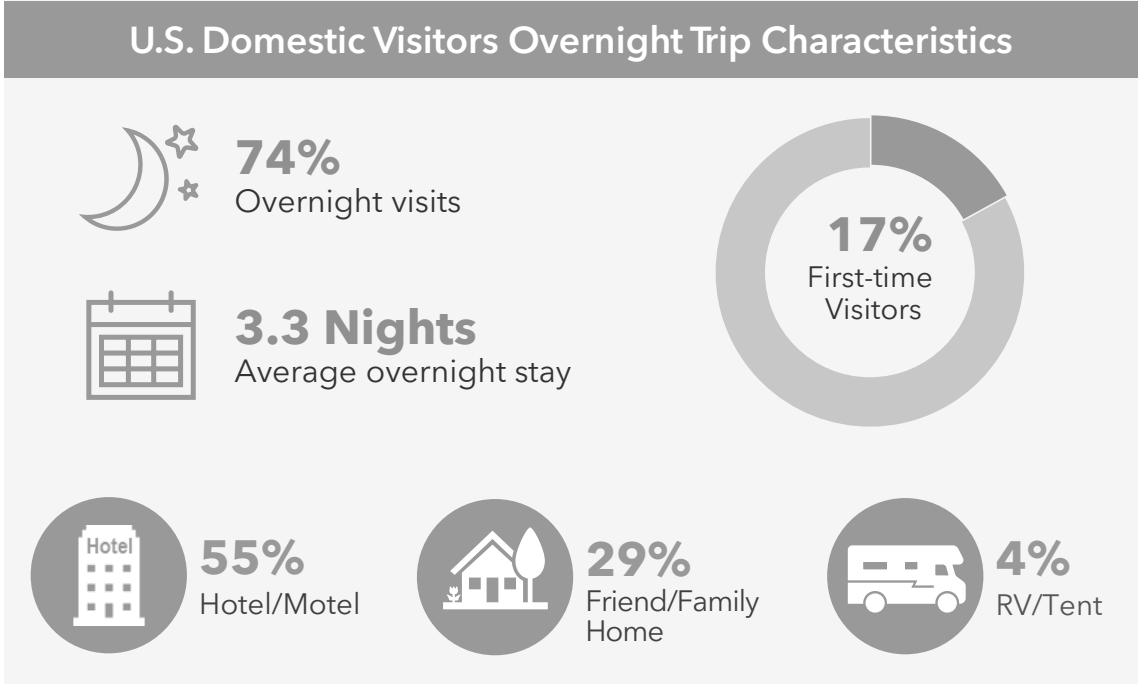


### Top Trip Planning Sources

	U.S. Domestic	Utah
1 Own experience	28%	32%
2 Friends/relatives	30%	31%
3 No plans made	29%	21%
4 Search engines	17%	19%
5 Destination website	10%	16%
6 Travel provider website	6%	9%
7 Social networks	6%	8%
8 Online Travel Agency	7%	7%

# First-time overnight visitation increases and coincides with shifts in accommodations

Eight in ten Utah visitors stayed overnight on their trips, which was higher than the national average. Utah’s overnight visitors averaged 3.1 nights in the destination, with half of them staying in a hotel/motel. 14% of Utah’s overnight visitors stayed in an RV/Tent thanks to high participation rates in outdoor activities.









Note: Hotel/motel includes B&B.

# Utah visitors enjoyed a wider variety of outdoor activities and preferred traveling with others than overall U.S. domestic travelers









Utah visitors were more likely than domestic travelers to travel with their significant other, children, and other family members. This contributed to a greater average travel party size (3.02 vs 2.70).

During their trip, Utah visitors engaged in a wider variety of outdoor activities, such as visiting National/State parks, hiking/backpacking, and rural sightseeing, than U.S. domestic travelers.

### Travel Party Composition

	U.S. Domestic	Utah
 Alone	22%	16%
 Spouse/Significant Other	54%	60%
 Children	29%	36%
 Friend(s)	11%	11%
 Other family members	17%	20%
 Other	2%	2%
Average Party Size	2.70	3.02

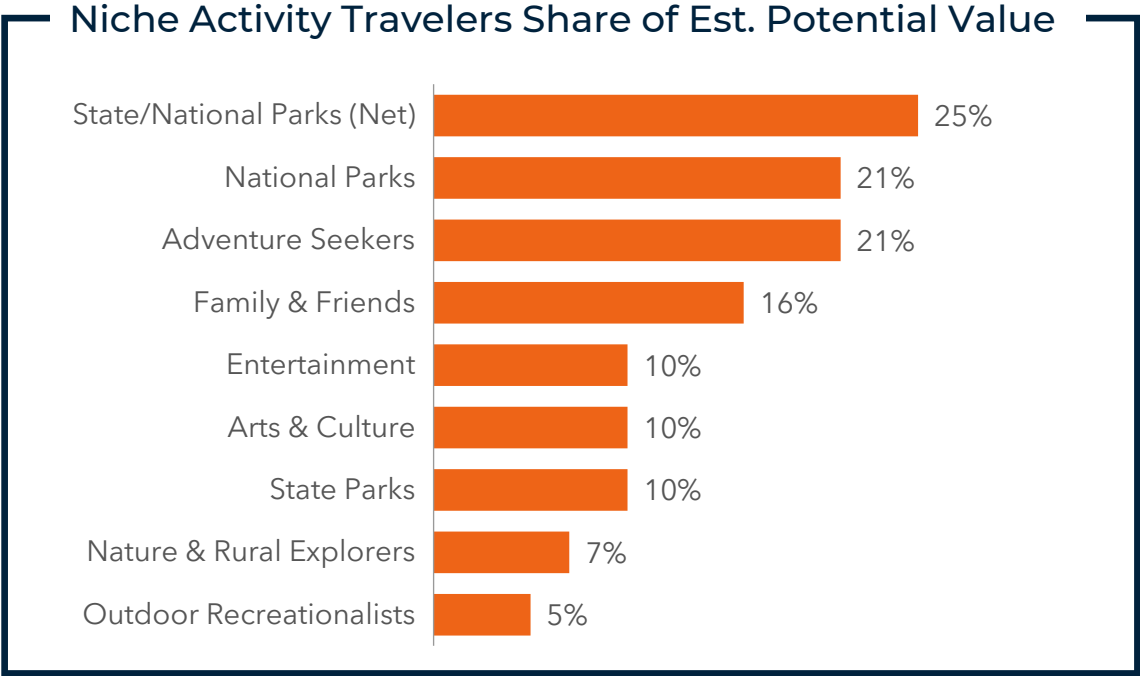
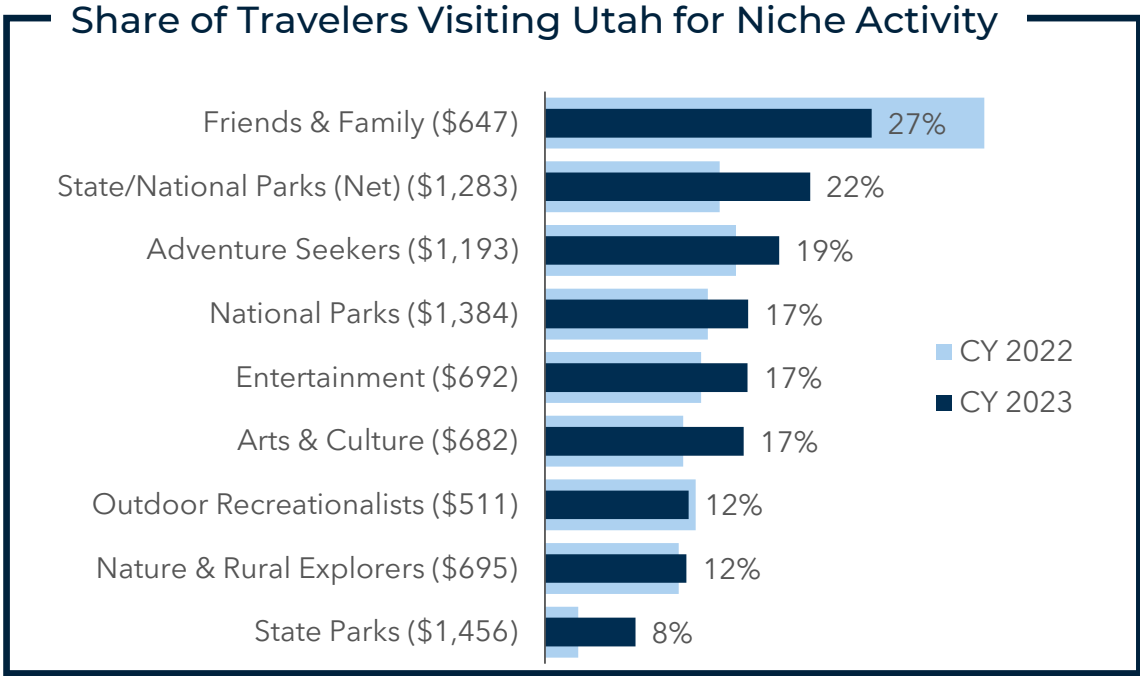
### Top Activities

	U.S. Domestic	Utah
 Visiting friends/relatives	33%	28%
 National park/Monument	7%	23%
 Hiking/Backpacking	9%	22%
 Historic sites	14%	20%
 Rural sightseeing	10%	17%
 Shopping	22%	16%
 State park/Monument	8%	16%
 Other nature	5%	13%

Note: Travel party composition is not mutually exclusive, and respondents may be included in more than one party composition. Other family members includes Grandchildren/Great grandchildren.  
 Note: National park/Monument/Rec areas shorted to National park/Monument (same for State park/Monument/Rec areas).

# Most of Utah's marketable niche activity segments grow as the friends and family segment pulls back

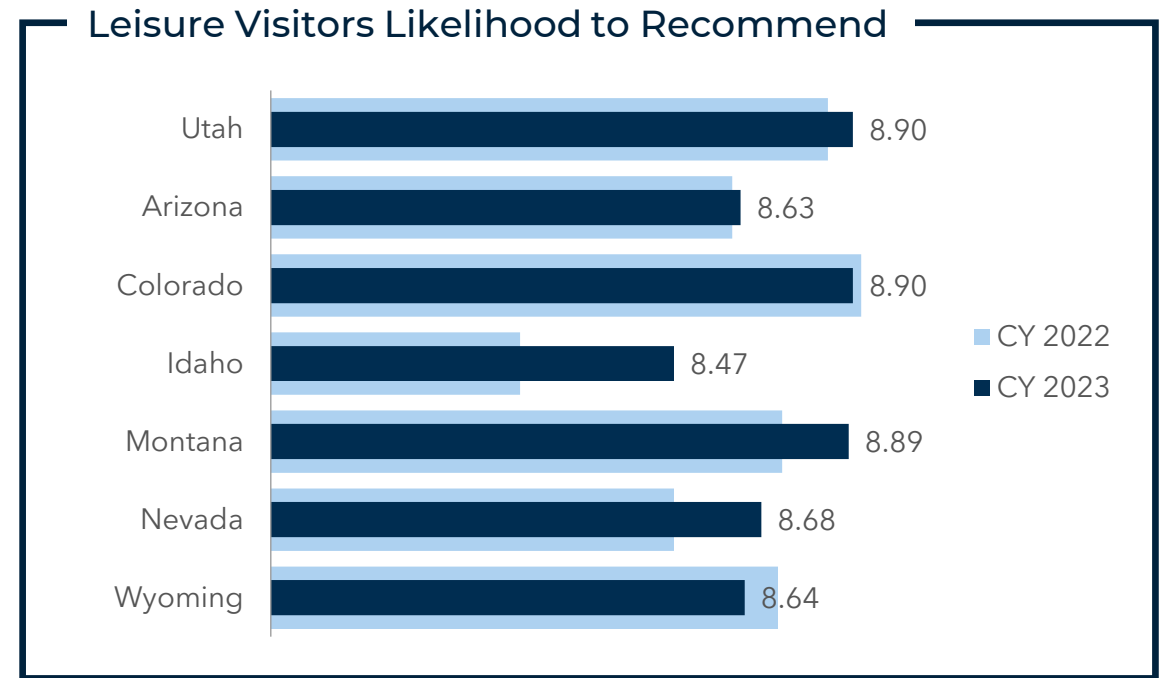
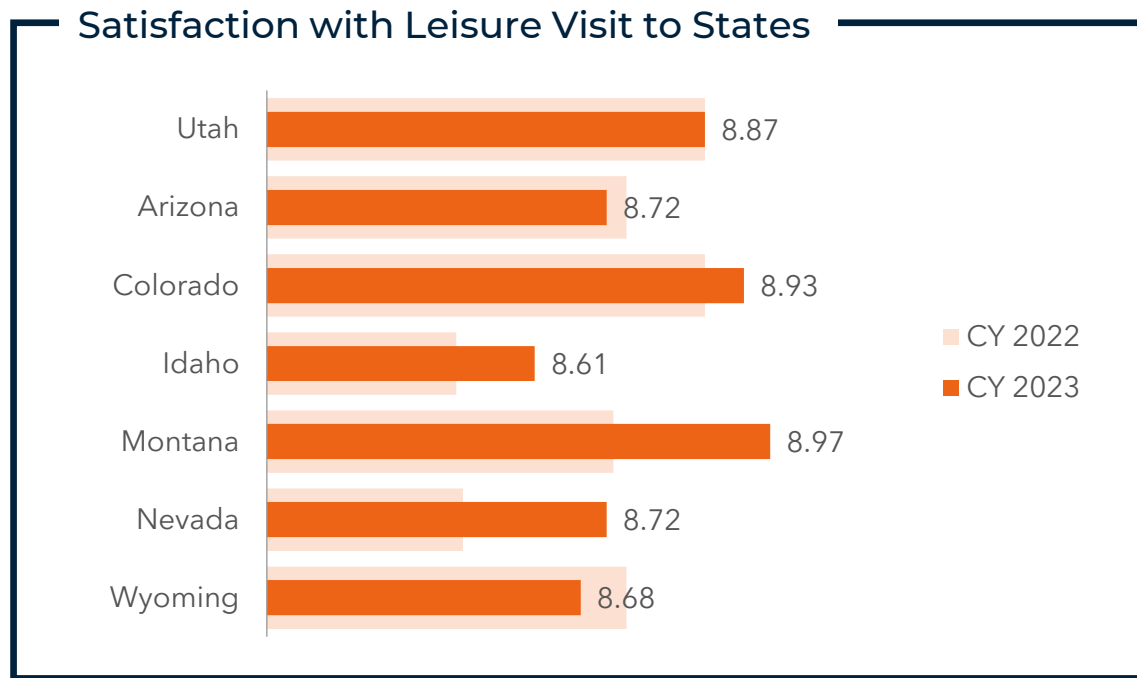
The State/National Parks niche offers the highest estimated potential value due to the average spend within that segment. While the Friends & Family segment draws the largest share of visitors, this segment's estimated potential value is middle of the pack due a relatively low average spend.



# Utah's leisure visitors were more likely to recommend a visit to the state than the previous year

Compared to its competitive set, Utah ranked third for average leisure trip satisfaction but tied with Colorado for first on likelihood to recommend at 8.90.

While Utah's average trip satisfaction remained on par with the previous year, average likelihood to recommend increased from 8.84 in 2022 to 8.90 in 2023.



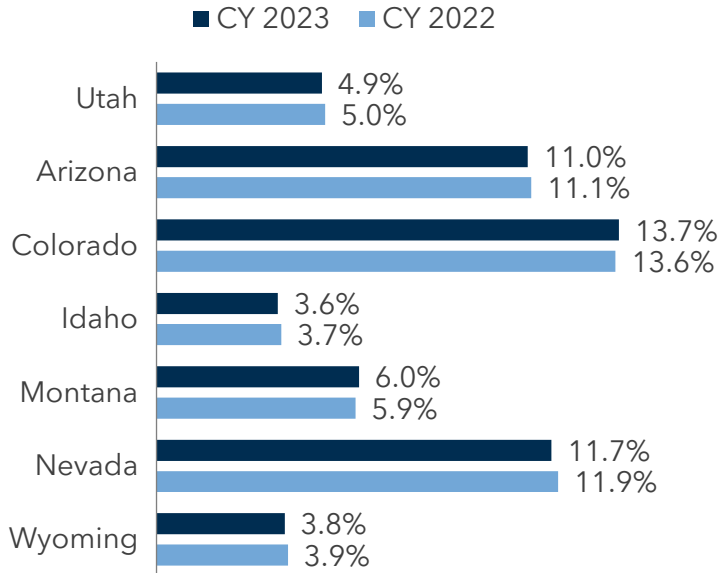
# Travel intent steadies for Utah and competitors

After Utah travel intent dipped to 4.9% in 2022 among U.S. travelers, it returned to its previous level of 5.0% in 2023. Future leisure travel intent for Utah was highest among residents of Los Angeles (9%), Salt Lake City (6%), and New York City (5%).

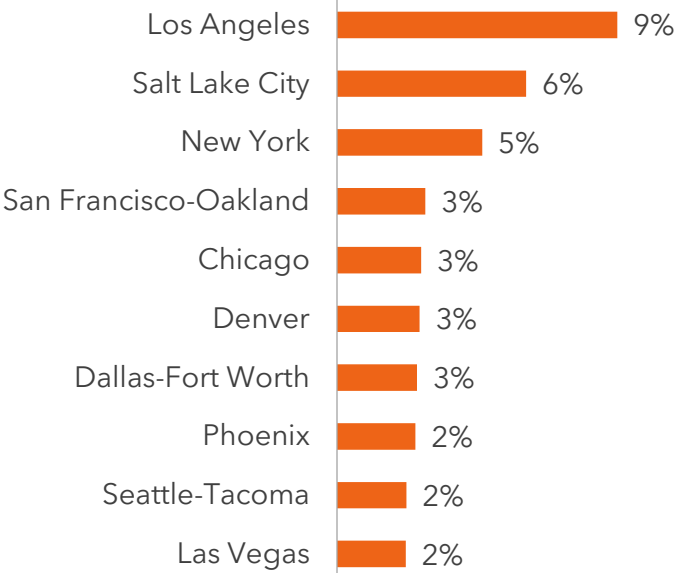
## Leisure Travel Intent



Intent to Visit States in Next 2 Years



Top DMAs for Utah Travel Intent



Note: San Francisco-Oakland-San Jose shortened to San Francisco-Oakland.



# Detailed Results

# Share of Visitors & Source Markets

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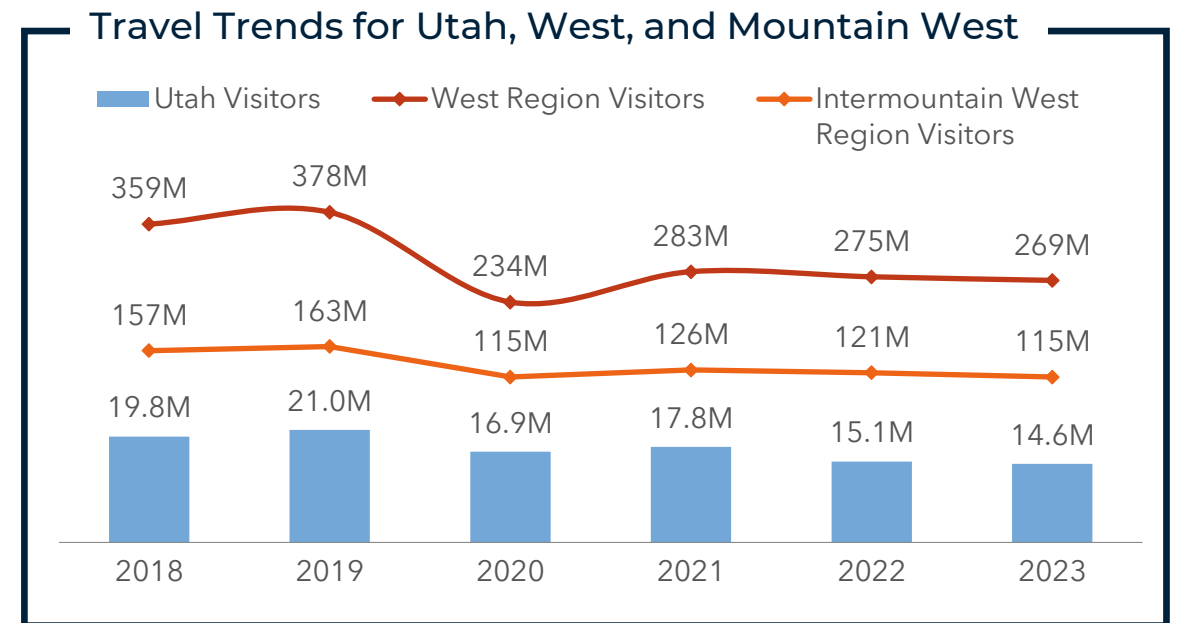
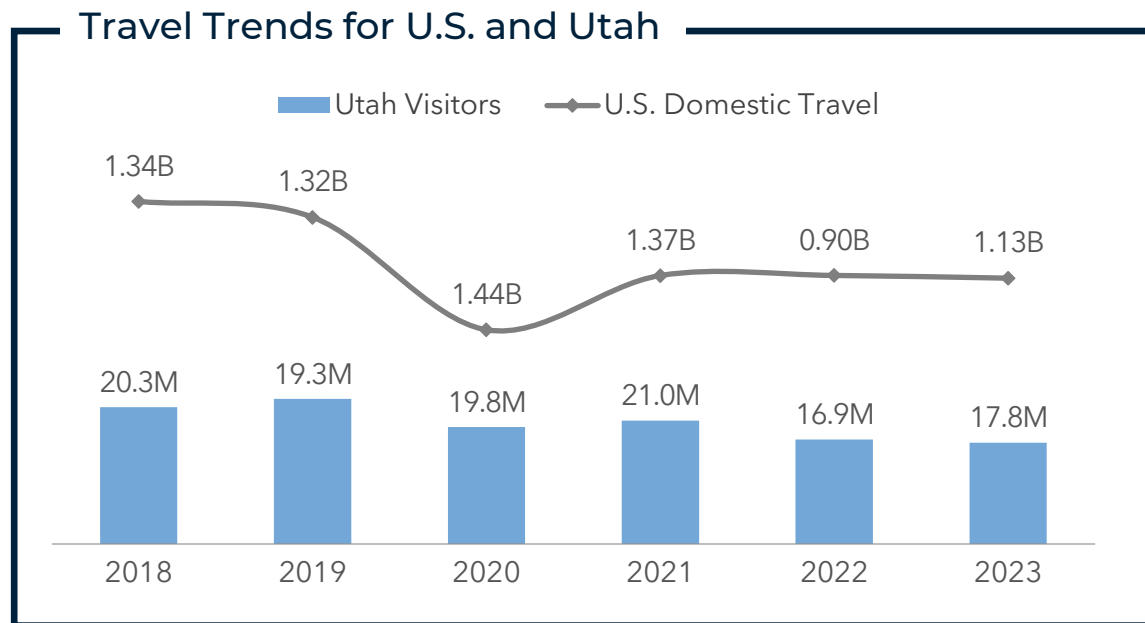




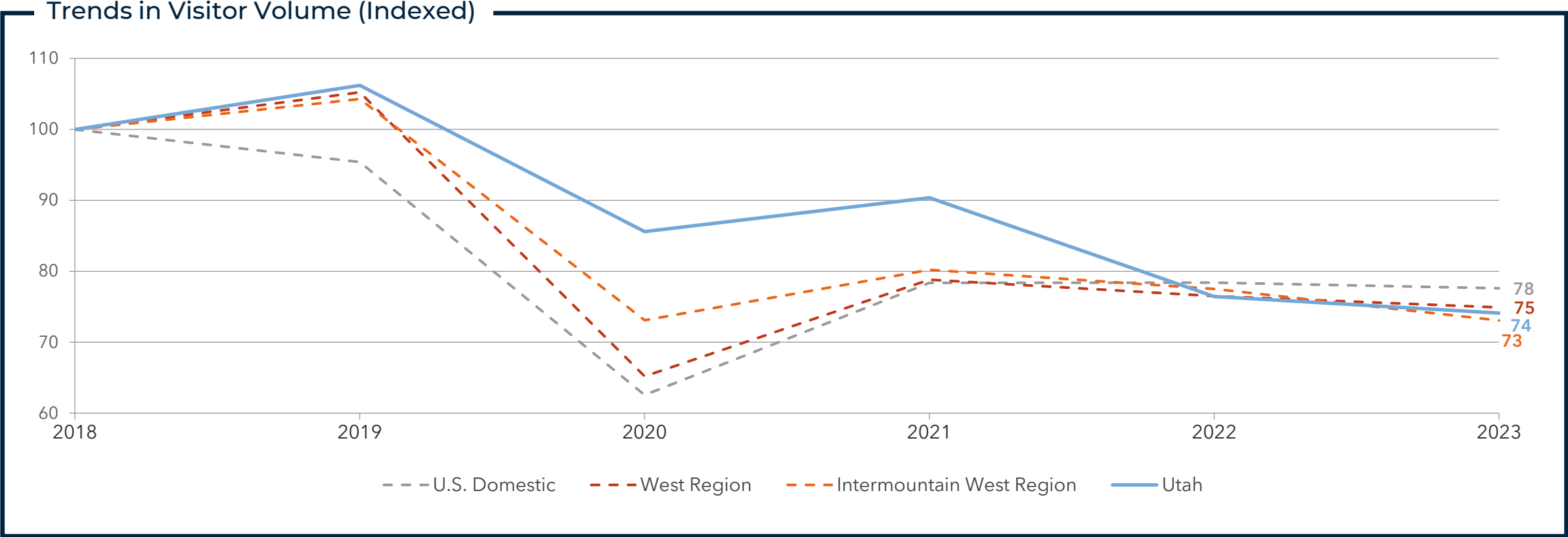
# Utah visitor volume contracts, as does domestic and regional travel in 2023

Pulled down by a decrease in out-of-state visitation (-6%), Utah's total visitor volume eased slightly lower in CY 2023 to 14.6 million, a 3% decrease from the previous year. During the same period, domestic travel within the United States decreased by 1%.

Regional visitor volume in the West Region (-2%) and Intermountain West Region (-6%) also declined in CY 2023.



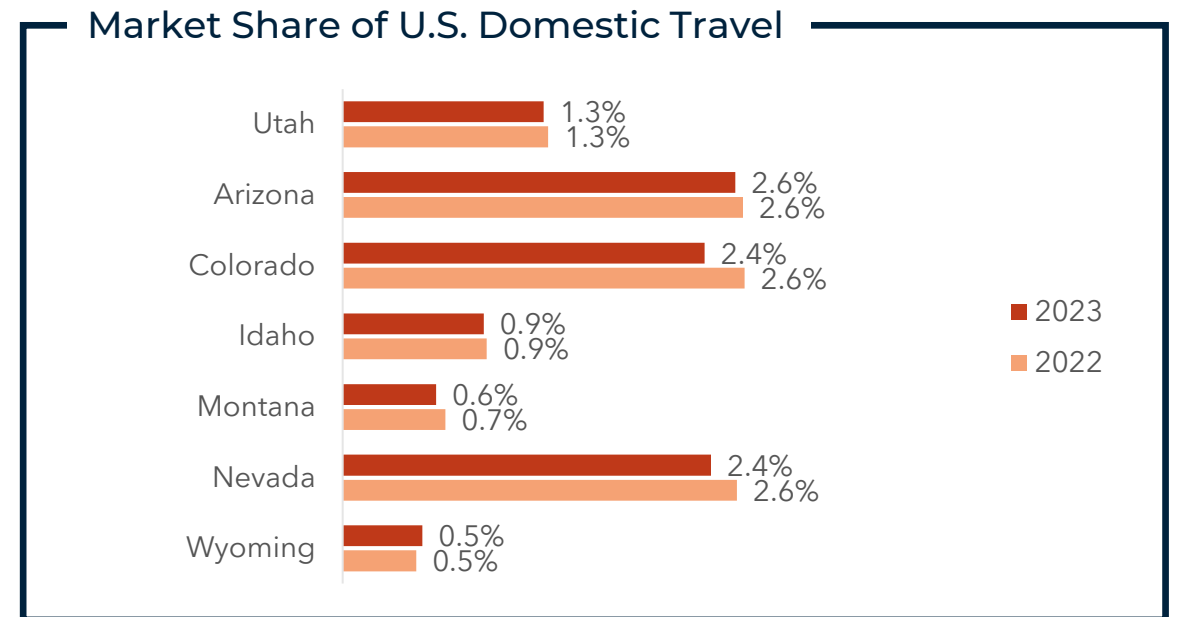
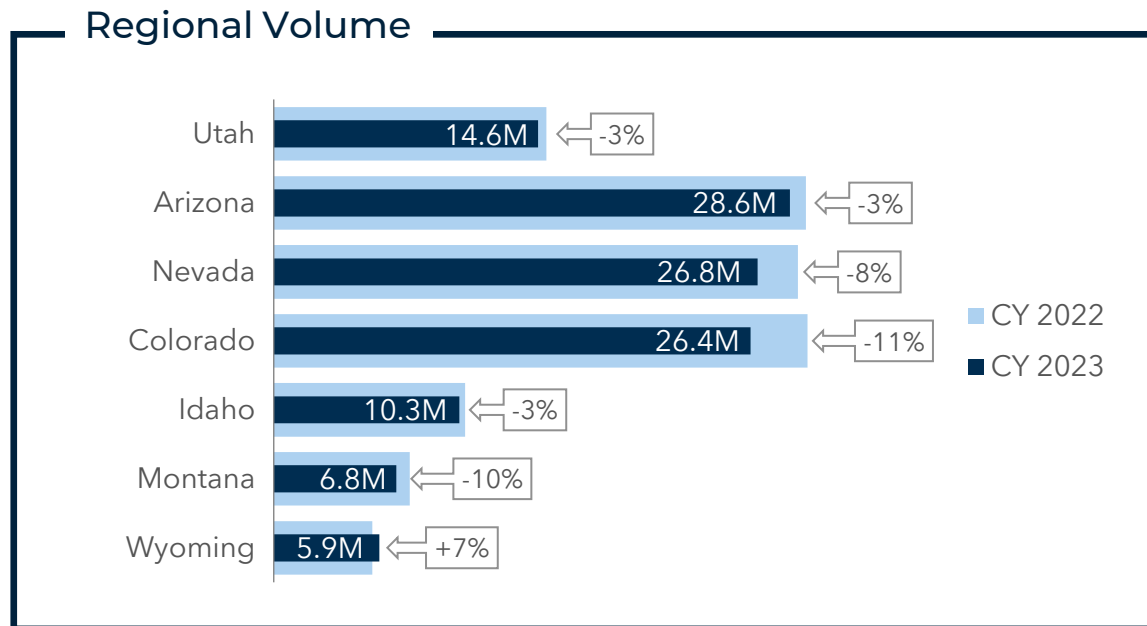
Since 2018, visitor volume has decreased by 26%, which is a similar visitation decrease as the West and Intermountain West



# Volume and market share ebbs for Utah and Regional Competitors

Utah hosted 14.6 million travelers in calendar year 2023, a decrease of 3% from the previous year. Regionally, apart from Wyoming, each of Utah's regional competitors also experienced visitor volume decreases in CY 2023. Decreases in visitation to Nevada (-8%), Montana (-10%), and Colorado (-11%) all out-paced Utah's decline.

Travel to Utah accounted for 1.3% of total domestic travel within the U.S. during 2023.



# While proximity influences where visitors come from, shifts still occur

Like the previous year, Utah's 2023 visitor base mostly came from within, or from nearby states. However, shifts in visitation from some states still occurred. More visitors came from Colorado than the previous year (8% vs 4%), while fewer residents from California and Idaho took a trip to the state. Likewise, more Utah visitors traveled to the state from Denver (+2 pts), while slightly less came from Phoenix and Las Vegas year-over-year.

**Top Origin States for Utah Visitors by Year**

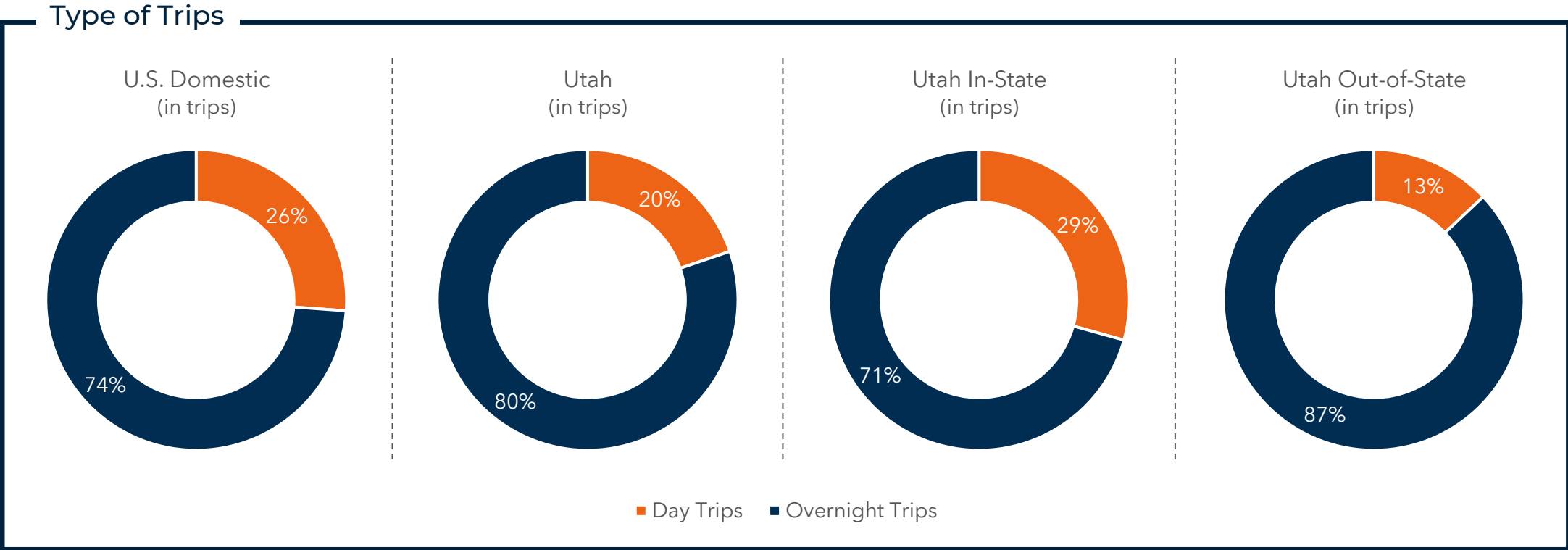
		2021	2022		2023	
<b>1</b>	Utah	39%	39%	-	40%	▲
<b>2</b>	California	13%	11%	▼	10%	▼
<b>3</b>	Colorado	5%	4%	▼	8%	▲
<b>4</b>	Idaho	6%	9%	▲	6%	▼
<b>5</b>	Nevada	5%	4%	▼	4%	-
<b>6</b>	Arizona	4%	4%	-	3%	▼
<b>7</b>	Washington	4%	3%	▼	3%	-
<b>8</b>	Texas	4%	3%	▼	3%	-
<b>9</b>	New York	1%	2%	▲	2%	-
<b>10</b>	Wyoming	1%	1%	-	2%	▲

**Top DMAs for Utah Visitors by Year**

		2021	2022		2023	
<b>1</b>	Salt Lake City	41%	40%	▼	42%	▲
<b>2</b>	Denver	4%	4%	-	6%	▲
<b>3</b>	Los Angeles	8%	5%	▼	5%	-
<b>4</b>	Phoenix	4%	4%	-	3%	▼
<b>5</b>	Idaho Falls-Pocatello	3%	3%	-	3%	-
<b>6</b>	Las Vegas	4%	4%	-	3%	▼
<b>7</b>	San Francisco-Oakland	1%	2%	▲	2%	-
<b>8</b>	Seattle-Tacoma	2%	2%	-	2%	-
<b>9</b>	San Diego	2%	2%	-	2%	-
<b>10</b>	Boise	2%	3%	▲	2%	▼

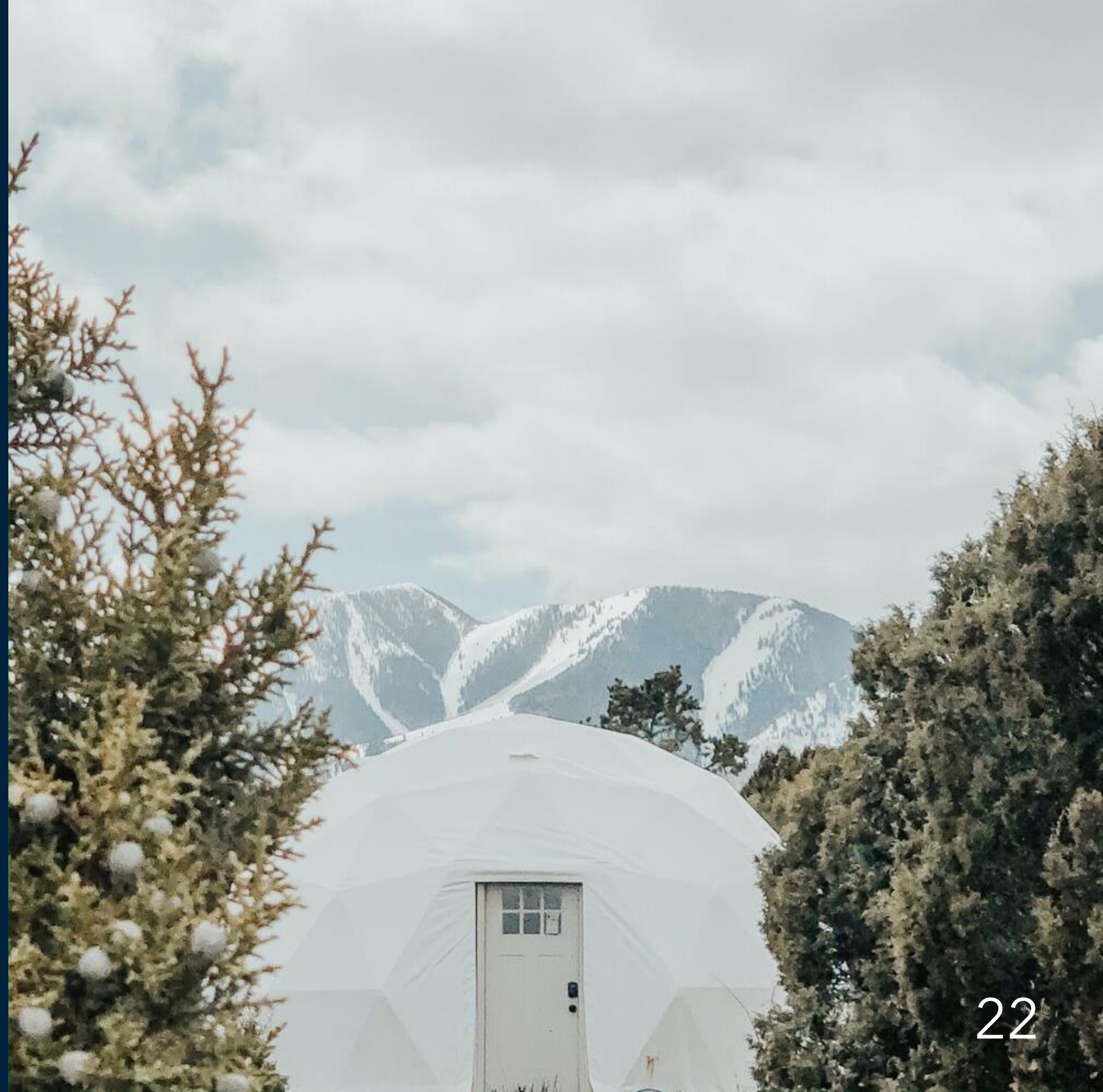
Note: San Francisco-Oakland-San Jose shortened to San Francisco-Oakland.

The proportion of overnight trips in 2023 increased from the previous year, thanks to more in-state overnight trips

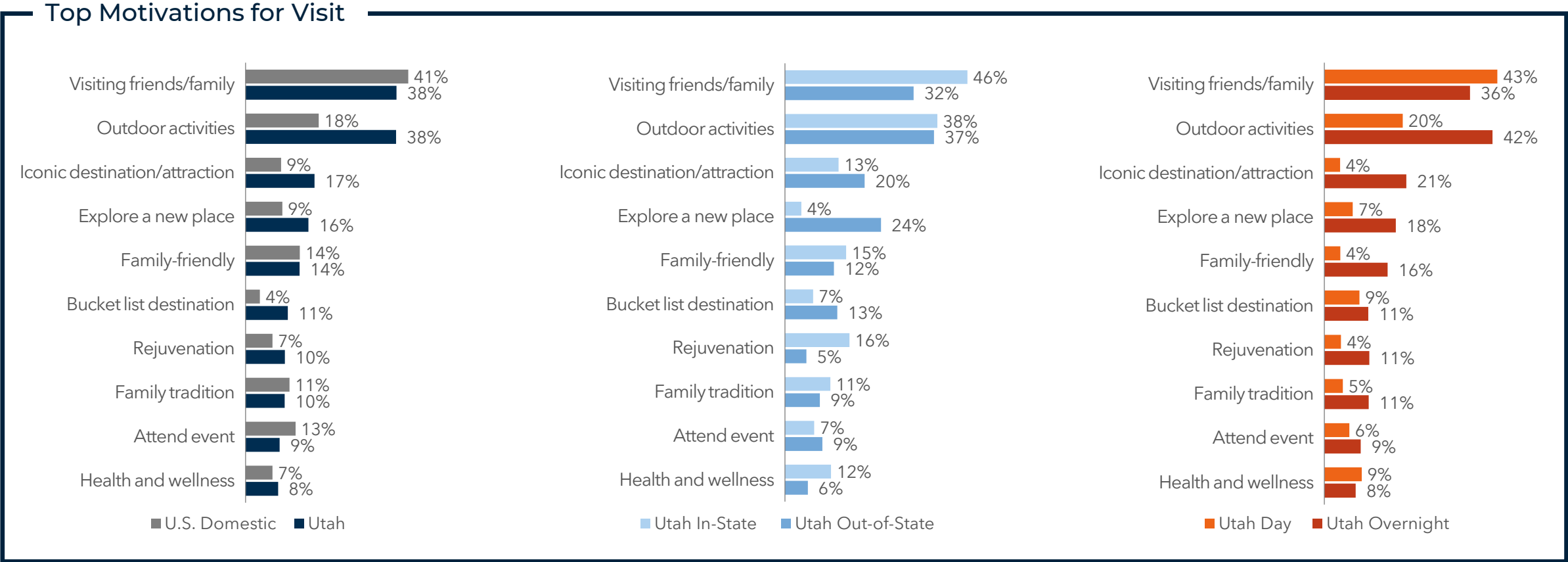


# Travel Motivations, Decision Timing & Trip Planning

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# In-state and out-of-state visitors were more motivated by outdoor activities than the year prior, which explains the shift in niche activity travel

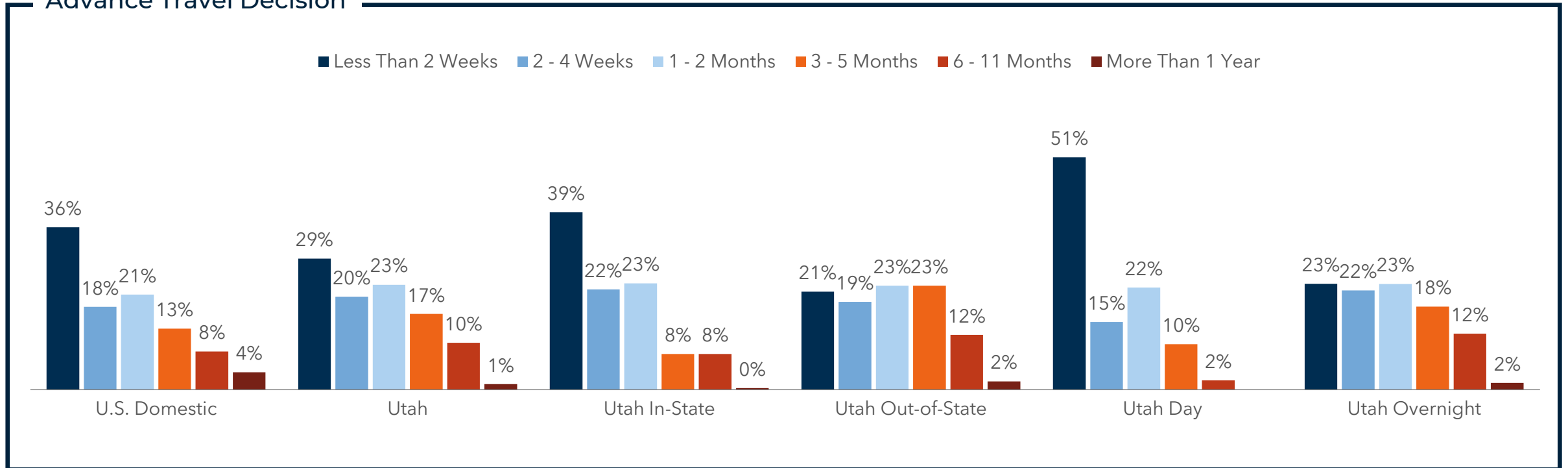


Note: Motivations for Visit differs from Activities as Primary/Secondary Reason for Visit.

# Utah visitors made travel decisions further out than U.S. domestic travelers

Visitors were less impulsive when deciding to visit Utah, with 51% making their decision at least one month before traveling. Utah's out-of-state and overnight visitors were much more likely to decide further in advance, with 60% and 55%, respectively, indicating they made their decision more than a month out.

## Advance Travel Decision





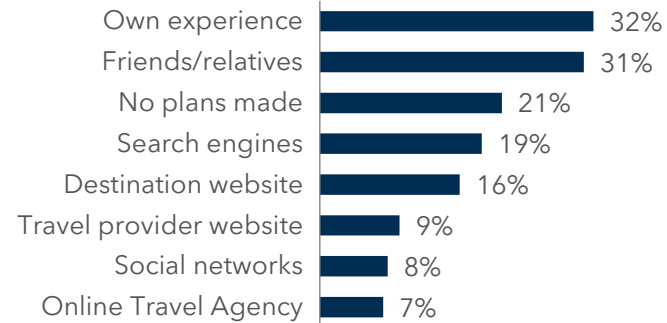
# Reliance on a variety of planning sources was more common for Utah visitors than overall domestic travelers

## Top Trip Planning Sources by Visitor Segment

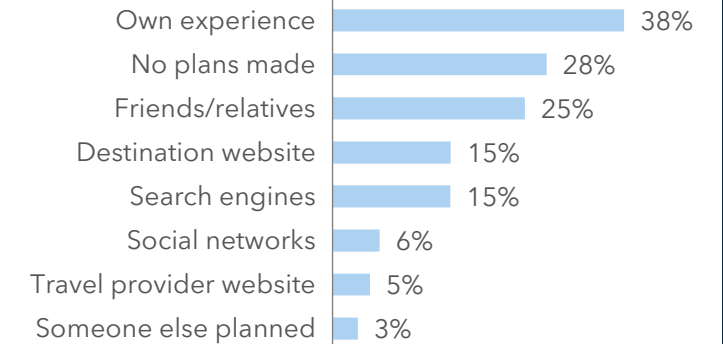
U.S. Domestic Travel



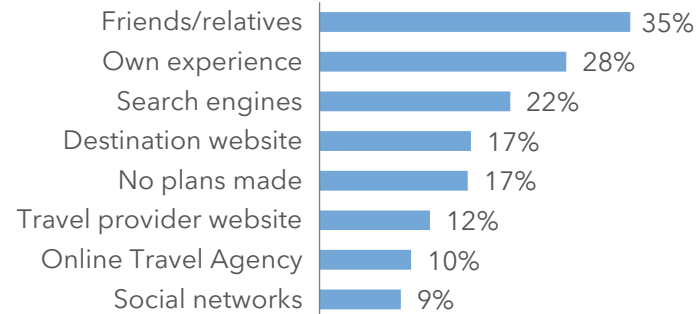
Utah



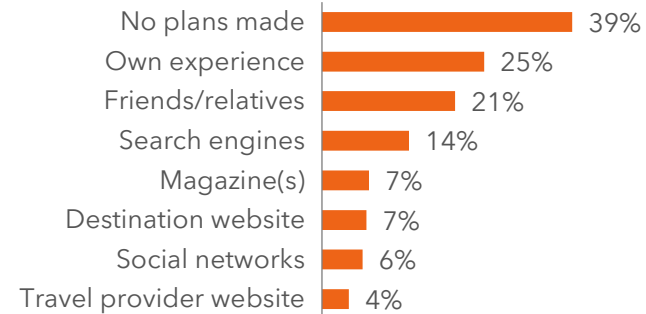
Utah In-State



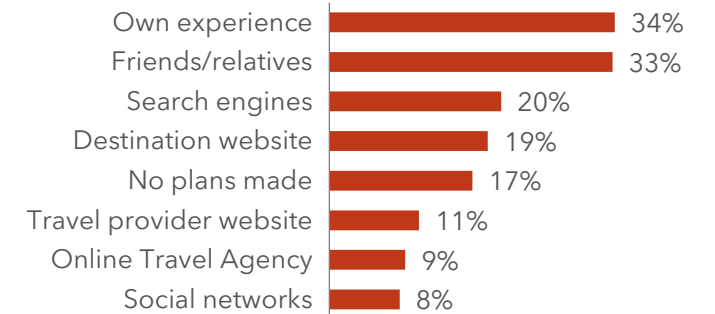
Utah Out-of-State



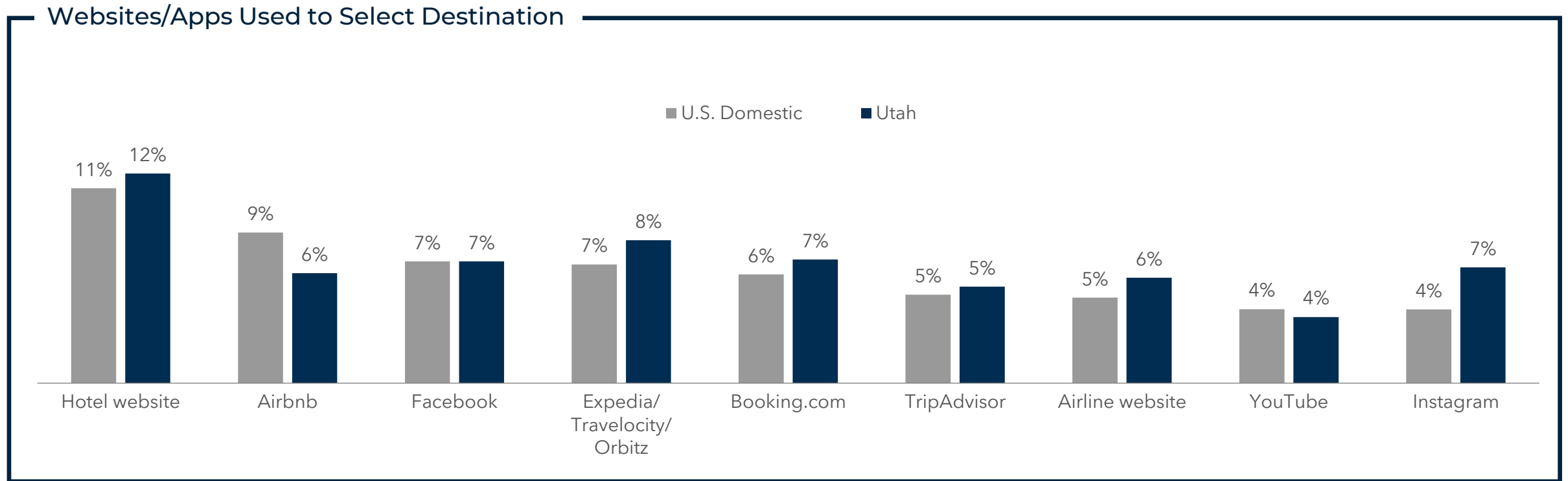
Utah Day



Utah Overnight

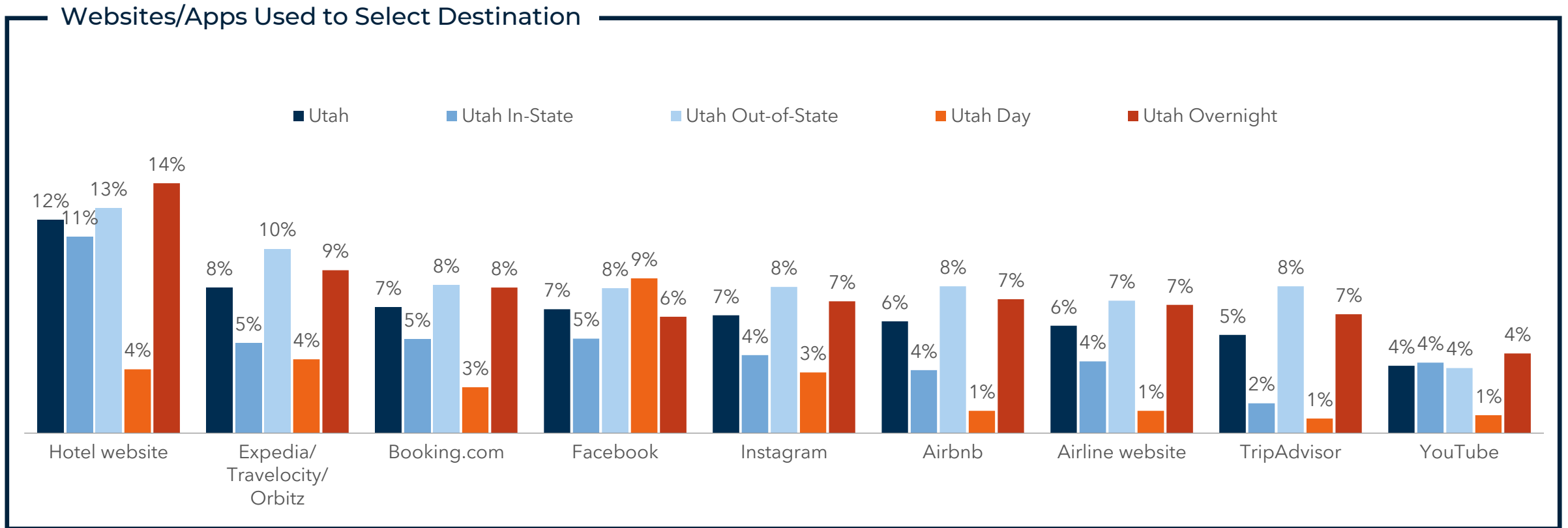


# When researching where to visit online, Utah visitors most often turn to hotel websites



Note: Respondents are asked to select the websites/apps used throughout the trip planning process. Figures shown reflect websites/apps chosen as being used to select destination.

# When selecting a destination, out-of-state and overnight visitors rely on a wider variety of websites/apps



Note: Respondents are asked to select the websites/apps used throughout the trip planning process. Figures shown reflect websites/apps chosen as being used to select destination.

# Trip Characteristics

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# The proportion of Utah leisure trips outpaced the national average, despite a decrease in VFR travel

## Primary Trip Purpose








	U.S. Domestic Travel		Utah Visitors	
	2022	2023	2022	2023
Leisure (net)	84%	83%	84%	86%
Visit Friends/Relatives	41%	40%	43%	35%
Outdoor Recreation	11%	10%	19%	24%
Entertainment/Sightseeing	17%	17%	11%	14%
Other Personal	15%	15%	11%	13%
Personal Business	6%	6%	4%	5%
General Business	7%	8%	8%	7%
Other	3%	4%	3%	3%

## Leisure Trip Purpose Distribution

	Utah Leisure Visitors		Utah In-State Visitors		Utah Out-of-State Visitors		Utah Day Visitors		Utah Overnight Visitors	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
Leisure (net)	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Visit Friends/Relatives	51%	41%	47%	43%	53%	40%	43%	59%	51%	40%
Outdoor Recreation	23%	28%	25%	29%	21%	27%	17%	21%	25%	27%
Entertainment/Sightseeing	14%	16%	12%	7%	15%	23%	23%	9%	12%	18%
Other Personal	13%	15%	16%	21%	11%	11%	17%	11%	12%	15%







# Three-quarters of Utah visitors travel to the state via personal vehicle, which is in-line with the national average

## Transportation To

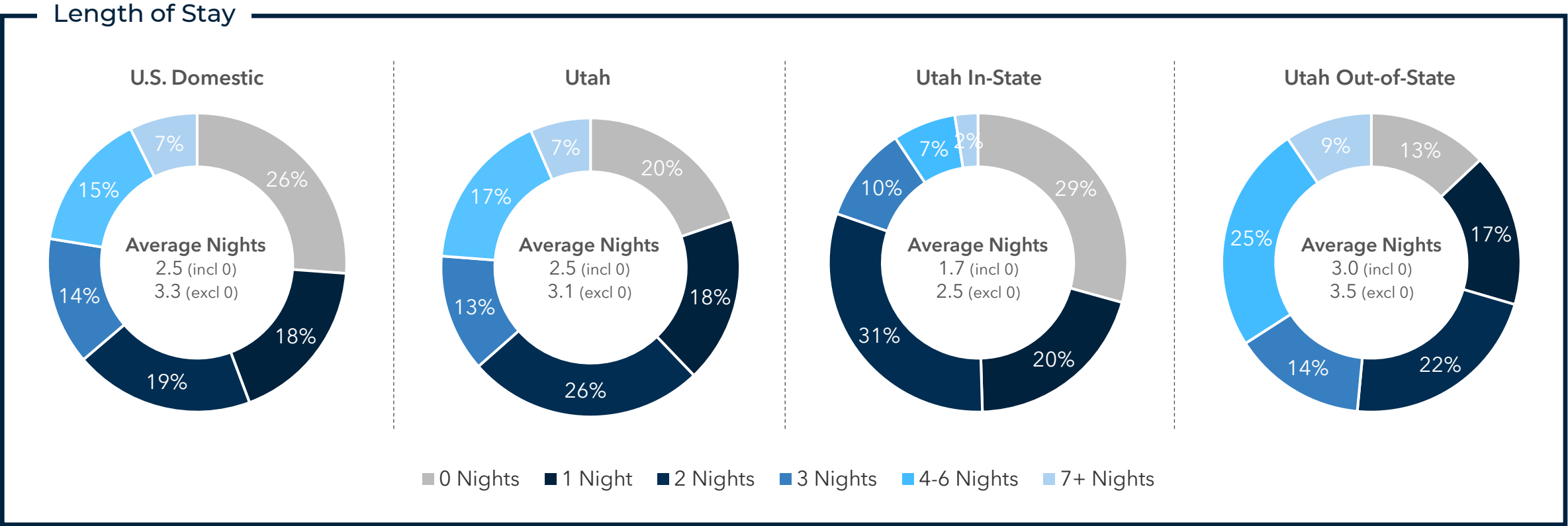
	U.S. Domestic	Utah	Utah In-State	Utah Out-of-State	Utah Day	Utah Overnight
 Personal Vehicle	75%	74%	92%	60%	87%	70%
 Airplane	15%	15%	2%	24%	4%	18%
 Rental Car	5%	7%	3%	10%	3%	8%
 Shared Economy/Taxi	3%	3%	1%	4%	0%	4%
 Motorcoach/Group Tour/Bus	2%	3%	0%	5%	7%	2%
 Camper/RV	2%	5%	5%	5%	2%	5%
 Other	6%	4%	4%	5%	8%	4%

# When traveling within the destination, Utah visitors were more likely to use a rental car or camper/RV than domestic travelers

## Transportation Within

	U.S. Domestic	Utah	Utah In-State	Utah Out-of-State	Utah Day	Utah Overnight
 Personal Vehicle	77%	77%	94%	64%	82%	75%
 Rental Car	11%	14%	5%	20%	5%	16%
 Shared Economy/Taxi	9%	8%	1%	12%	2%	9%
 Motorcoach/Group Tour/Bus	3%	4%	0%	7%	7%	3%
 Camper/RV	1%	5%	5%	5%	1%	6%
 Other	8%	6%	3%	8%	6%	6%

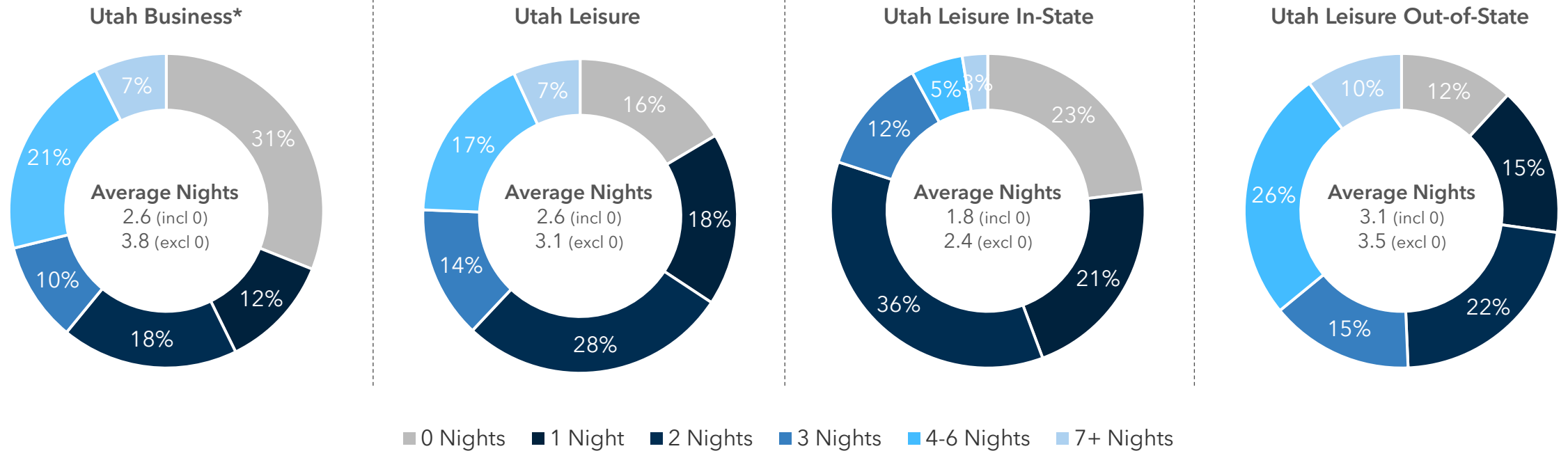
# Travelers visiting Utah from outside the state stay more than a day longer, on average, than in-state visitors





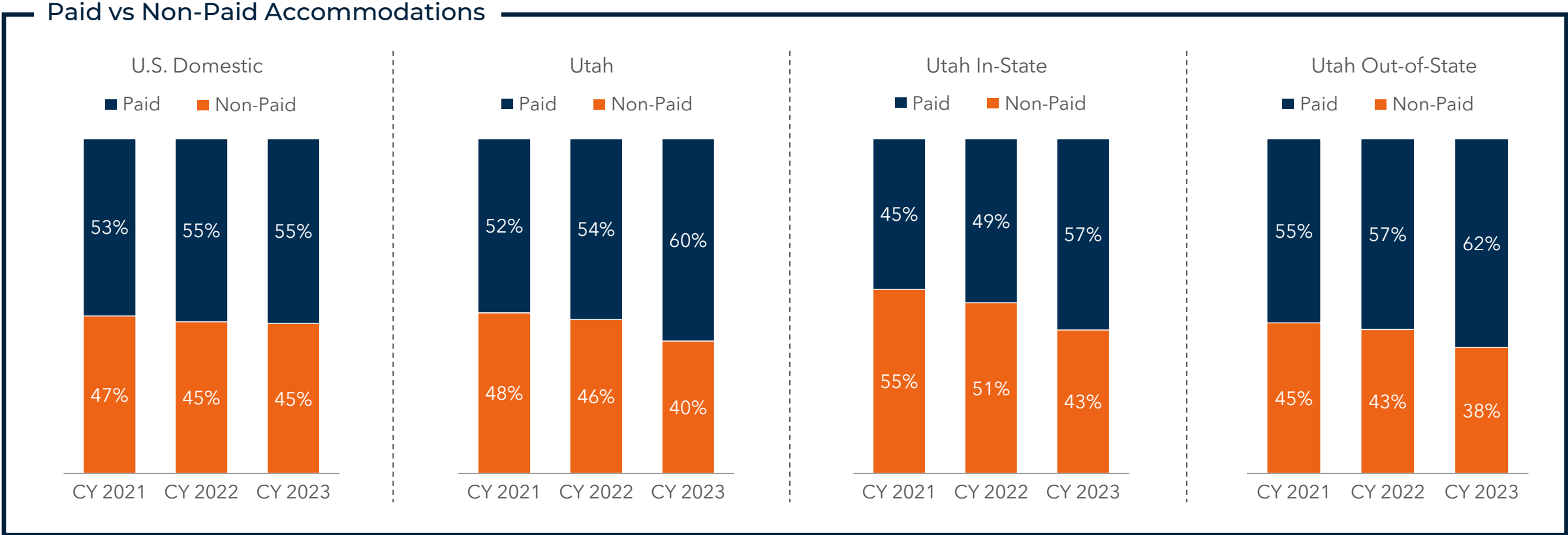
# Utah leisure visitors were more likely to stay overnight than the average Utah visitor (84% vs 80%)

## Length of Stay



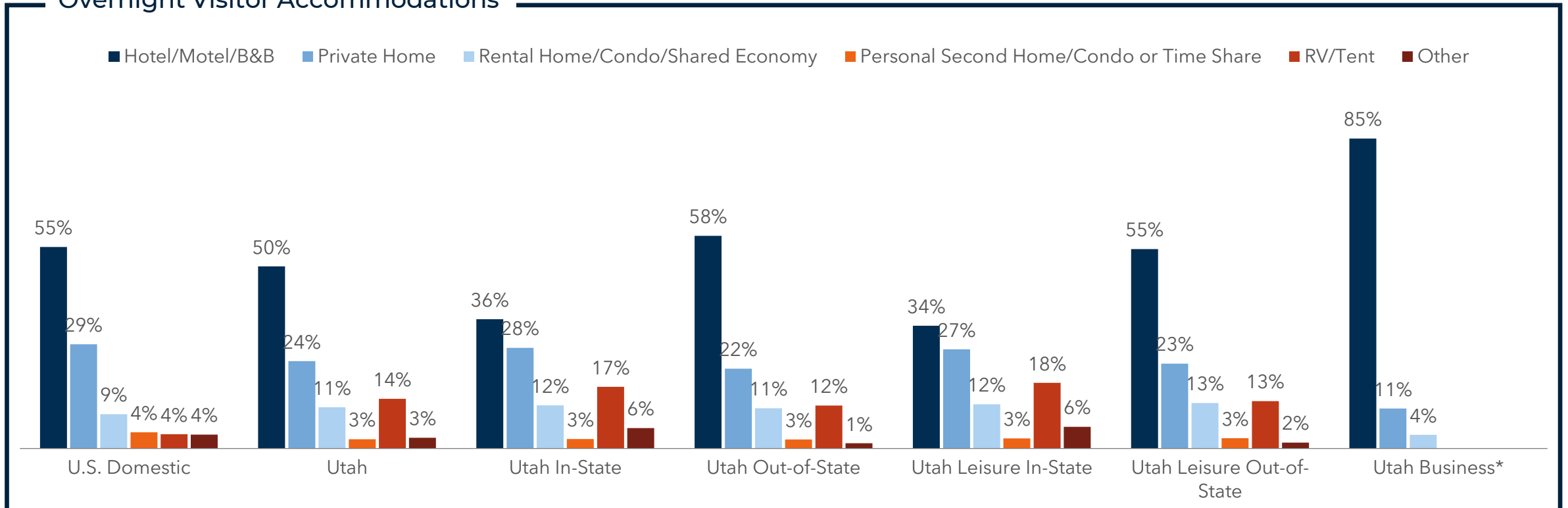
\*Small sample size (MOE ≈ 9%)

# The use of paid accommodations increased for Utah in 2023 thanks to more visitors staying in hotel/motels

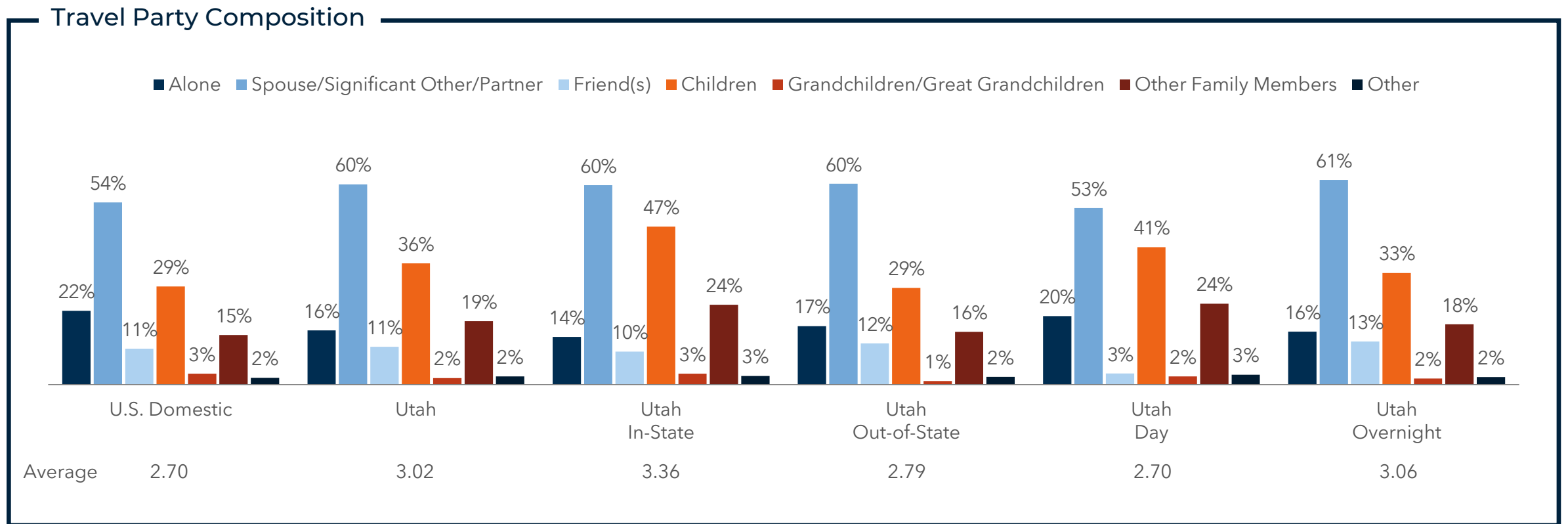


# Utah's overnight visitors were more likely to stay in an RV/Tent due to high participation rates in outdoor activities

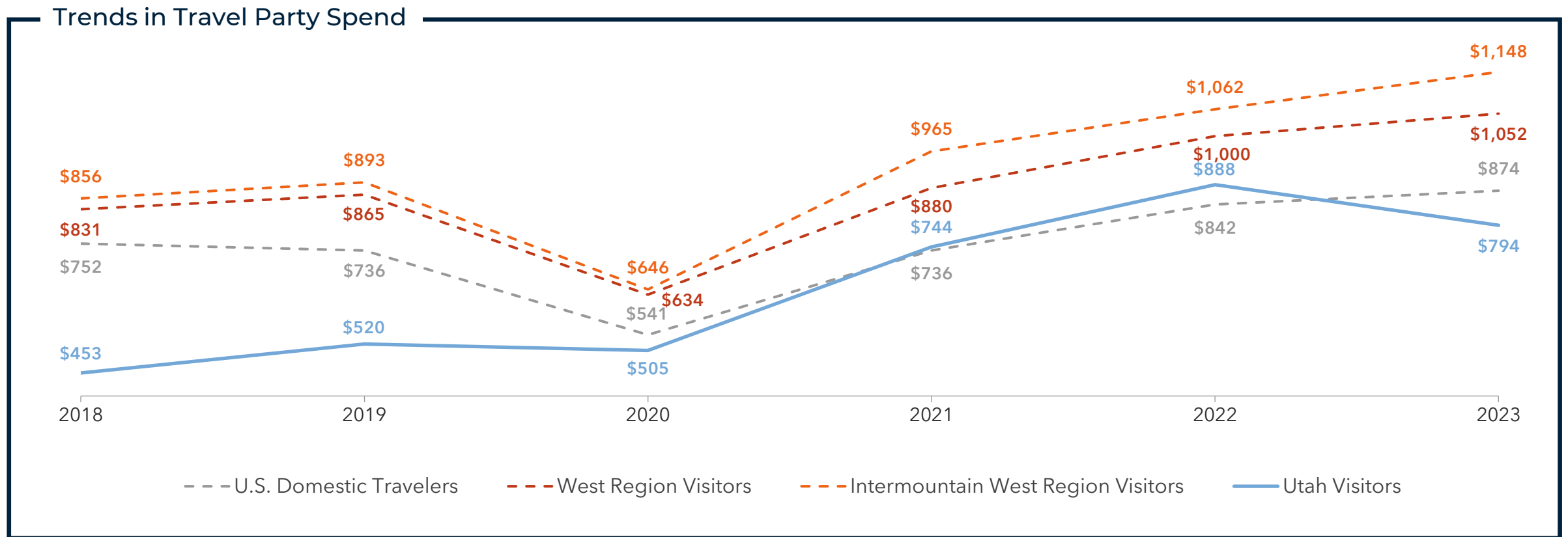
Overnight Visitor Accommodations



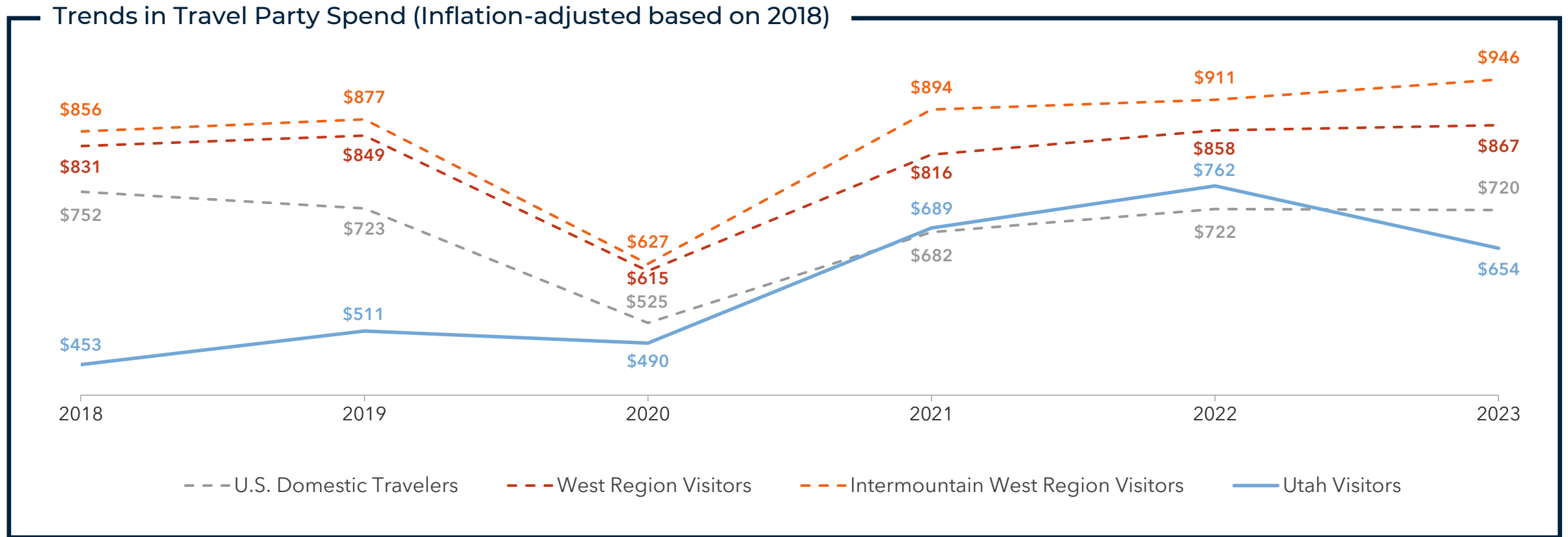
# Utah visitors were more likely to travel with spouse, children, and other family members, contributing to larger travel party sizes



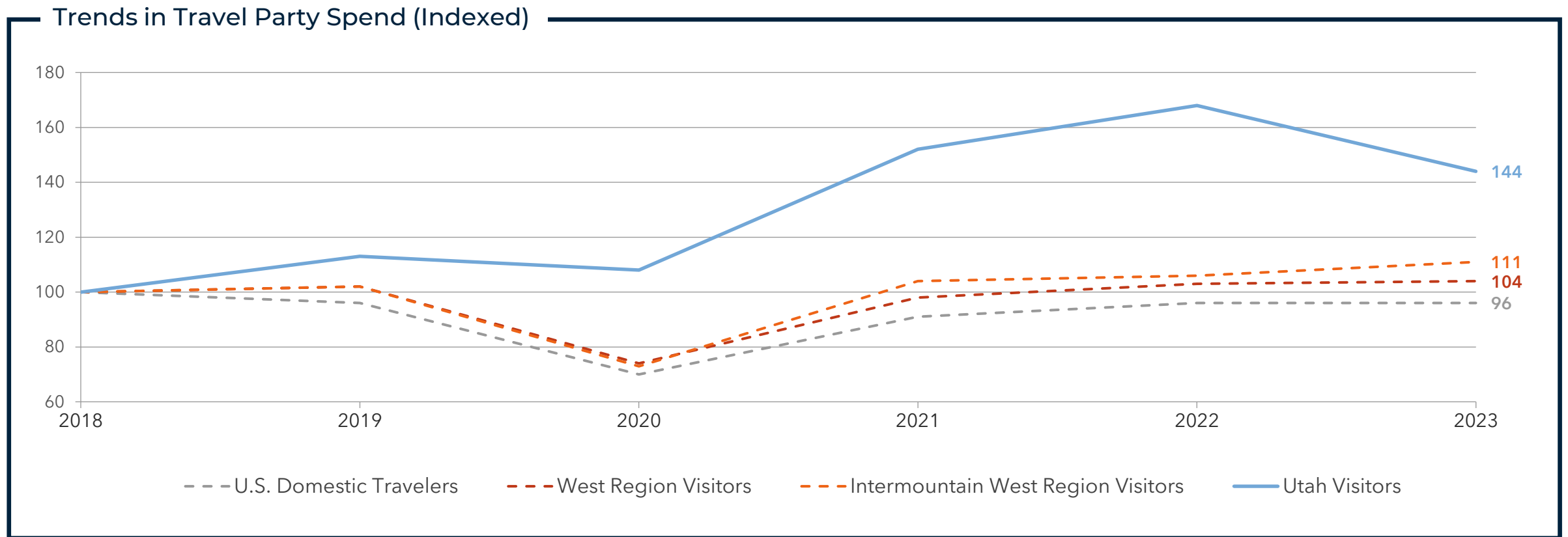
Despite Utah's decrease in travel party spend compared to the previous year, 2023 spend remained above pre-pandemic levels and was the second highest since 2018



# Adjusted for inflation, Utah's 2023 travel party spend was less than the previous two years while being well above pre-pandemic levels



Since 2018, accounting for inflation, Utah's travel party spend has increased by 44%, which is more than the U.S., West, and Intermountain West

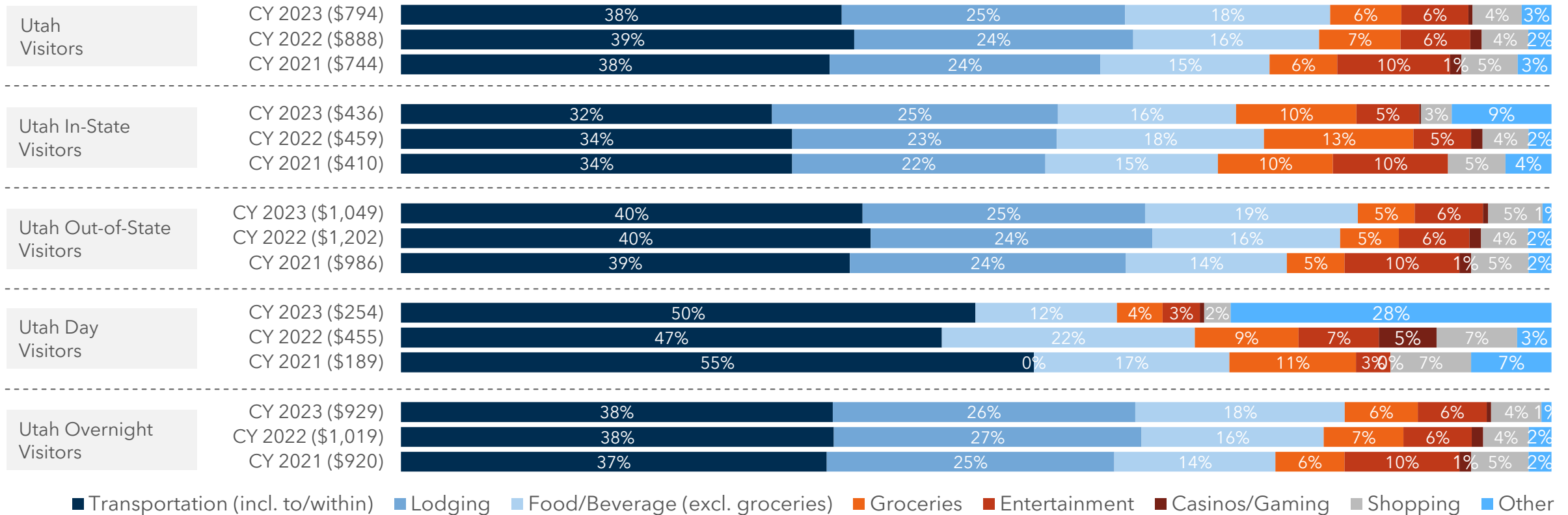


Note: Index is based on inflation-adjusted spend to 2018.



# 2023 travel party spend regressed compared to the previous year but was above 2021 levels

Average Spend for Utah Trips by Segment  
Total Spending by Travel Party (including 0)

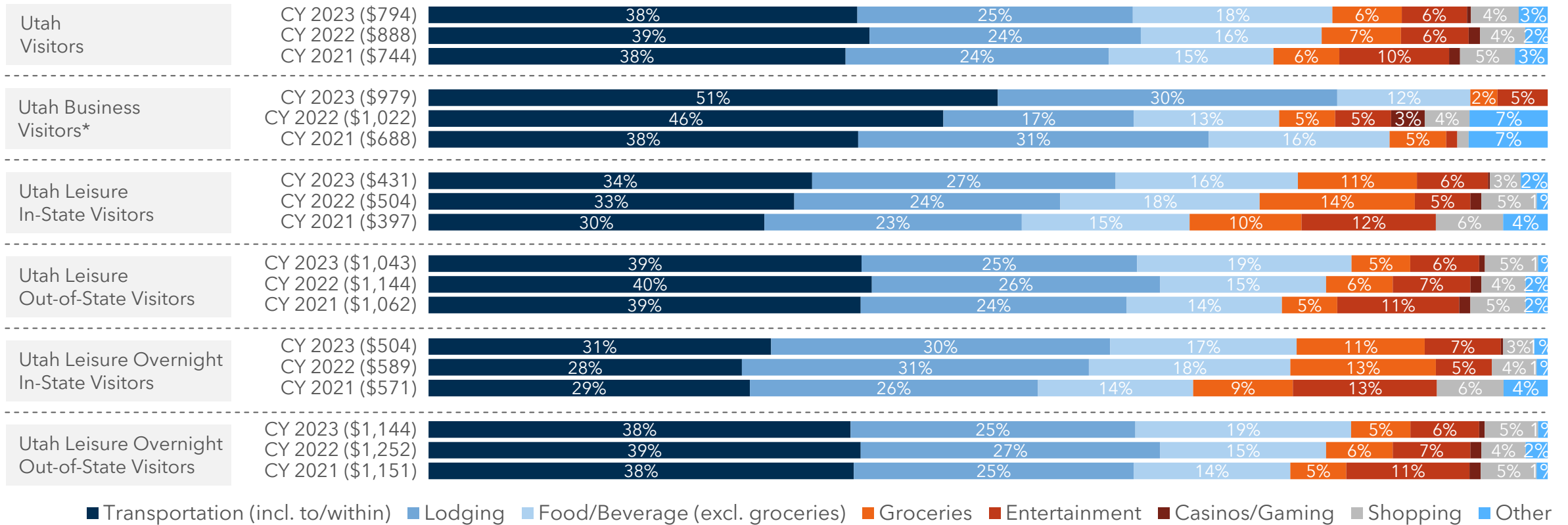


Note: Transportation includes transportation to/within the state



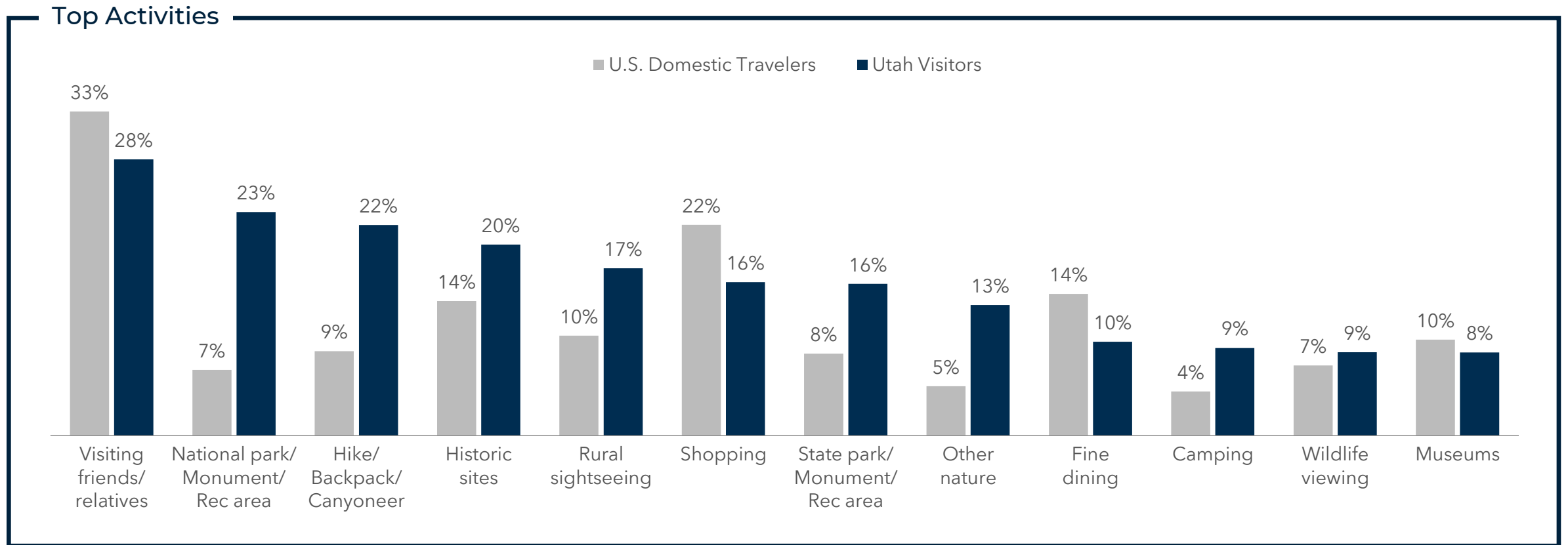
# Leisure, out-of-state visitors to Utah spent more than any other travel segment

Average Spend for Utah Trips by Segment  
Total Spending by Travel Party (including 0)



Note: Transportation includes transportation to/within the state  
\*Small sample size (MOE ≈ 9%)

# Utah visitors enjoyed a variety of outdoor activities, such as National/State parks, hiking, historic sites, and rural sightseeing



# In-state and out-of-state visitors took advantage of all the outdoor activities that Utah has to offer

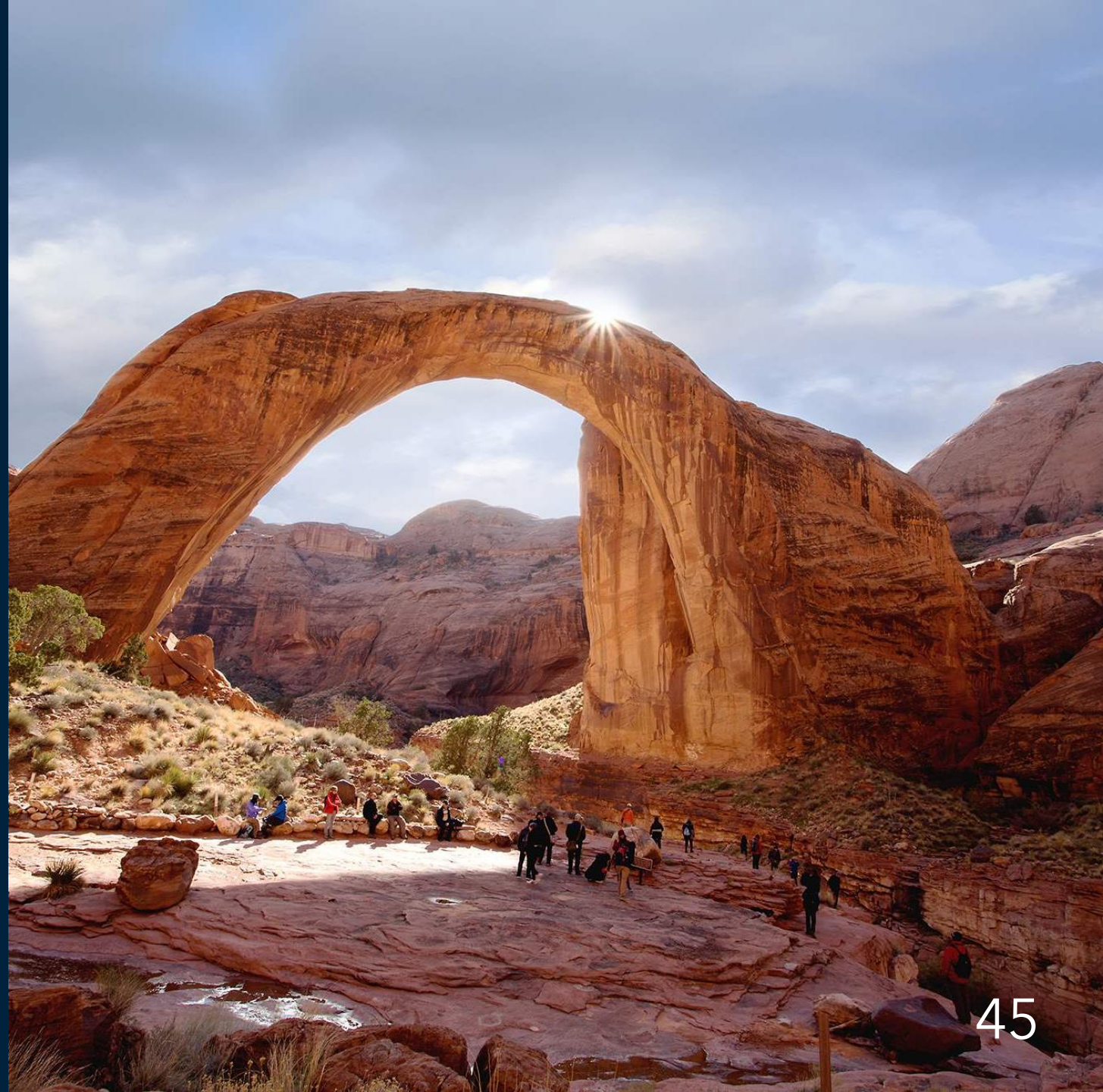
Utah In-State Top Activities			Utah Out-of-State Top Activities			Utah Day Top Activities			Utah Overnight Top Activities		
1	Visiting friends/relatives	33%	1	National park/Monument/Rec areas	28%	1	Visiting friends/relatives	30%	1	Visiting friends/relatives	28%
2	Other nature	18%	2	Hiking/Backpacking/Canyoneering	25%	2	Historic sites	12%	2	National park/Monument/Rec areas	27%
3	Hiking/Backpacking/Canyoneering	17%	3	Visiting friends/relatives	24%	3	Rural sightseeing	10%	3	Hiking/Backpacking/Canyoneering	26%
4	National park/Monument/Rec areas	16%	4	Historic sites	23%	4	Other	8%	4	Historic sites	21%
5	Rural sightseeing	15%	5	State park/Monument/Rec areas	19%	5	Other nature	8%	5	Rural sightseeing	19%
6	Historic sites	15%	6	Rural sightseeing	18%	6	Shopping	7%	6	State park/Monument/Rec areas	18%
7	Shopping	14%	7	Shopping	17%	7	National park/Monument/Rec areas	7%	7	Shopping	18%
8	State park/Monument/Rec areas	11%	8	Fine dining	11%	8	Sports events (spectator)	6%	8	Other nature	15%
9	Camping	10%	9	Museums	10%	9	Fine dining	6%	9	Camping	11%
10	Swimming	8%	10	Wildlife viewing	10%	10	State park/Monument/Rec areas	5%	10	Fine dining	10%

# Utah destinations featuring the wonders of nature observed the greatest upward movement, while Utah's largest city remains stable at the top

Utah Destinations Visited	Utah Visitors		Utah In-State Visitors		Utah Out-of-State Visitors	
	CY 2022	CY 2023	CY 2022	CY 2023	CY 2022	CY 2023
Salt Lake City	32%	33%	18%	18%	43%	43%
St. George	14%	15%	19%	22%	11%	10%
Provo/Orem	14%	14%	13%	13%	14%	14%
Moab	9%	12%	4%	6%	13%	17%
Zion/Springdale	7%	10%	3%	4%	11%	15%
Park City	8%	10%	3%	3%	11%	15%
Bryce Canyon	6%	9%	1%	2%	10%	13%
Cedar City	7%	7%	3%	6%	11%	7%
Logan	5%	5%	4%	5%	6%	5%
Ogden	9%	5%	2%	3%	14%	5%
Monument Valley/Monticello/Bluff/Mexican Hat	4%	4%	1%	1%	6%	6%
Torrey/Capitol Reef	3%	4%	4%	2%	2%	5%
Kanab	4%	4%	0%	1%	7%	6%
Davis County/Lagoon	4%	3%	4%	3%	4%	4%
Escalante/Boulder	3%	3%	2%	1%	4%	4%
Garden City/Bear Lake	3%	3%	3%	2%	2%	3%
Brigham City	6%	2%	4%	0%	7%	4%
Vernal	3%	2%	5%	1%	1%	3%
Dutch John/Flamingo Gorge	1%	1%	0%	0%	1%	2%
Other	17%	18%	26%	27%	11%	11%

# Niche Vacation Motivations

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# Niche activities motivate travel to Utah

Visitor characteristics vary between the niche activities motivating travel:

- Adventure Seekers: 21% of leisure trips, most overnight stays
- Parks: 24% of leisure trips, oldest, highest spend
- Outdoor Recreationalists: 13% of leisure trips, youngest, most Utah residents
- Nature & Rural Explorers: 12% of leisure trips, second-most day trips
- Arts & Culture: 15% of leisure trips, lowest travel party size
- Entertainment: 16% of leisure trips, highest family travel
- Family & Friends: 31% of leisure trips, ranks as the highest % of leisure trips

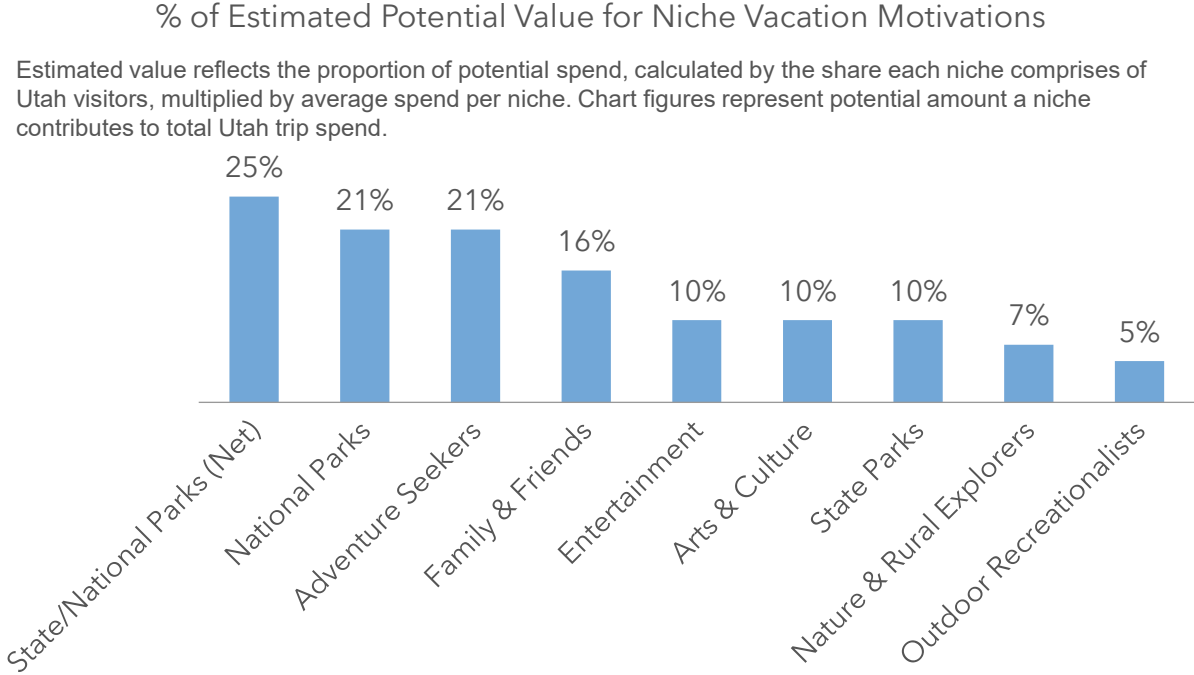
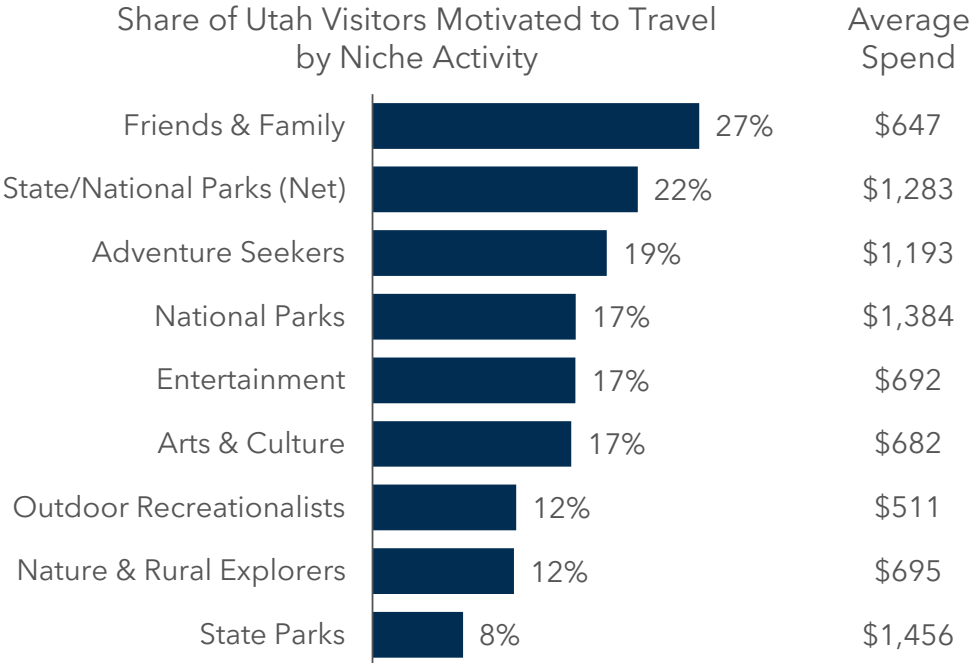
	Leisure visitors	Arts & Culture	State/National Parks (Net)	State Parks	National Parks	Adventure Seekers	Outdoor Recreationalist	Nature & Rural Explorers	Entertainment	Family & Friends
% of Leisure Trips	100%	15%	24%	8%	19%	21%	13%	12%	16%	31%
<b>Demographics</b>										
Average Age	44.2	44.7	48.2	46.5	49.1	39.5	39.2	47.6	41.5	41.9
Approx. Avg. Household Income	\$98,100	\$93,171	\$112,047	\$116,697	\$108,723	\$108,865	\$92,356	\$113,403	\$98,659	\$89,744
Children <18 in Household	41%	39%	32%	39%	26%	31%	38%	44%	56%	42%
<b>Residence</b>										
Utah Resident	41%	37%	23%	32%	18%	38%	64%	43%	45%	49%
Neighbor State Resident	24%	21%	23%	30%	19%	15%	17%	27%	29%	30%
<b>Trip Characteristics</b>										
Overnight Stay	84%	82%	91%	89%	93%	96%	89%	77%	72%	81%
Average Nights (excl. 0)	4.2	4.5	5.8	5.4	6.2	4.2	3.9	3.9	3.2	4.3
Average Travel Party Size	3.1	2.4	3.2	3.2	3.2	3.1	3.6	3.0	3.1	3.3
Family Travel Party	30%	30%	21%	27%	17%	14%	30%	37%	46%	33%
Average Spend (per trip/party)	\$791	\$682	\$1,283	\$1,456	\$1,384	\$1,193	\$511	\$695	\$692	\$647

Note: Niche activity figures reflect Utah visitors who said an activity within the niche category was a primary/secondary reason for visit (see glossary for niche category definitions); since it's possible for an activity as a primary reason and secondary reason for visit to fall in different niches, some overlap will exist

# Travelers motivated to visit Utah for niche activities provide value and contribute to total spending in the state

The most lucrative niche activity segments:

- The State/National Parks niche offers the highest estimated potential value due to the average spend within that segment. While the Friends & Family segment draws the largest share of visitors, this segment’s estimated potential value is middle of the pack due a relatively low average spend.

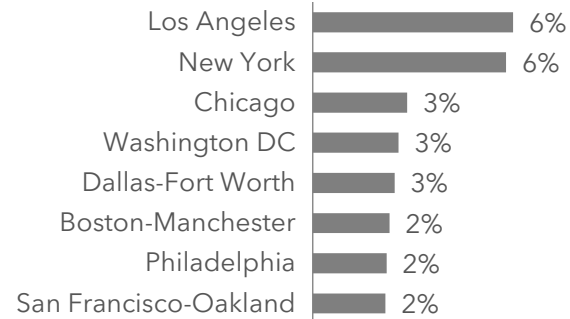


Note: Niche activity figures reflect Utah visitors who said an activity within the niche category was a primary/secondary reason for visit (see glossary for niche category definitions); since it’s possible for an activity as a primary reason or secondary reason for visit to fall in different niches, some overlap will exist.

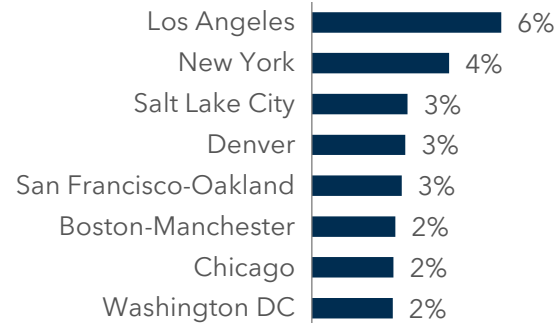
# Utah could potentially expand its visitor base by targeting travel markets with a propensity to travel for niche activities that Utah offers

## Top Markets for Targeting U.S. Niche Travelers

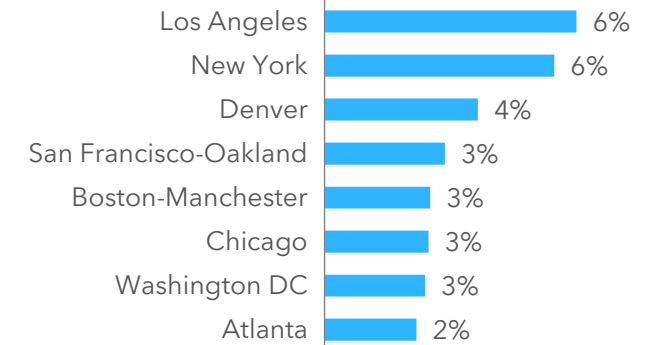
Top DMAs for Arts & Culture Travelers



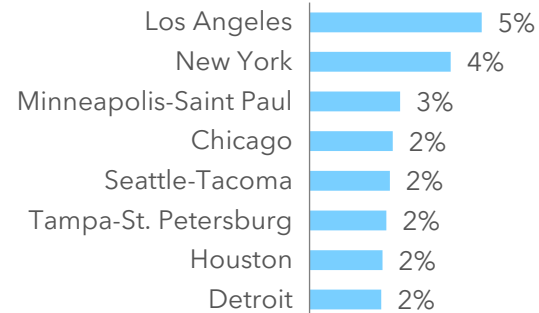
Top DMAs for State/National Parks Travelers



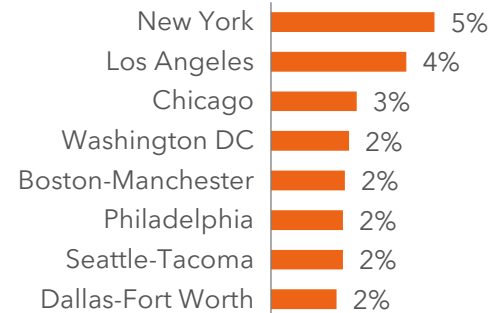
Top DMAs for Adventure Seekers



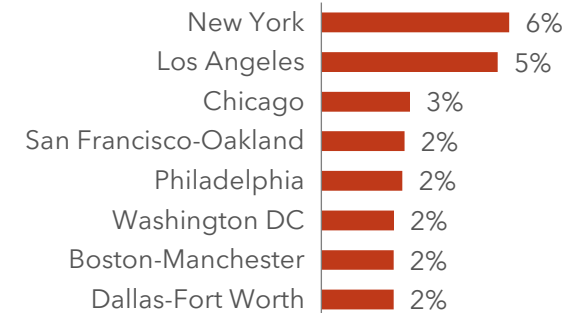
Top DMAs for Outdoor Recreationalists



Top DMAs for Nature & Rural Explorers



Top DMAs for Entertainment Travelers

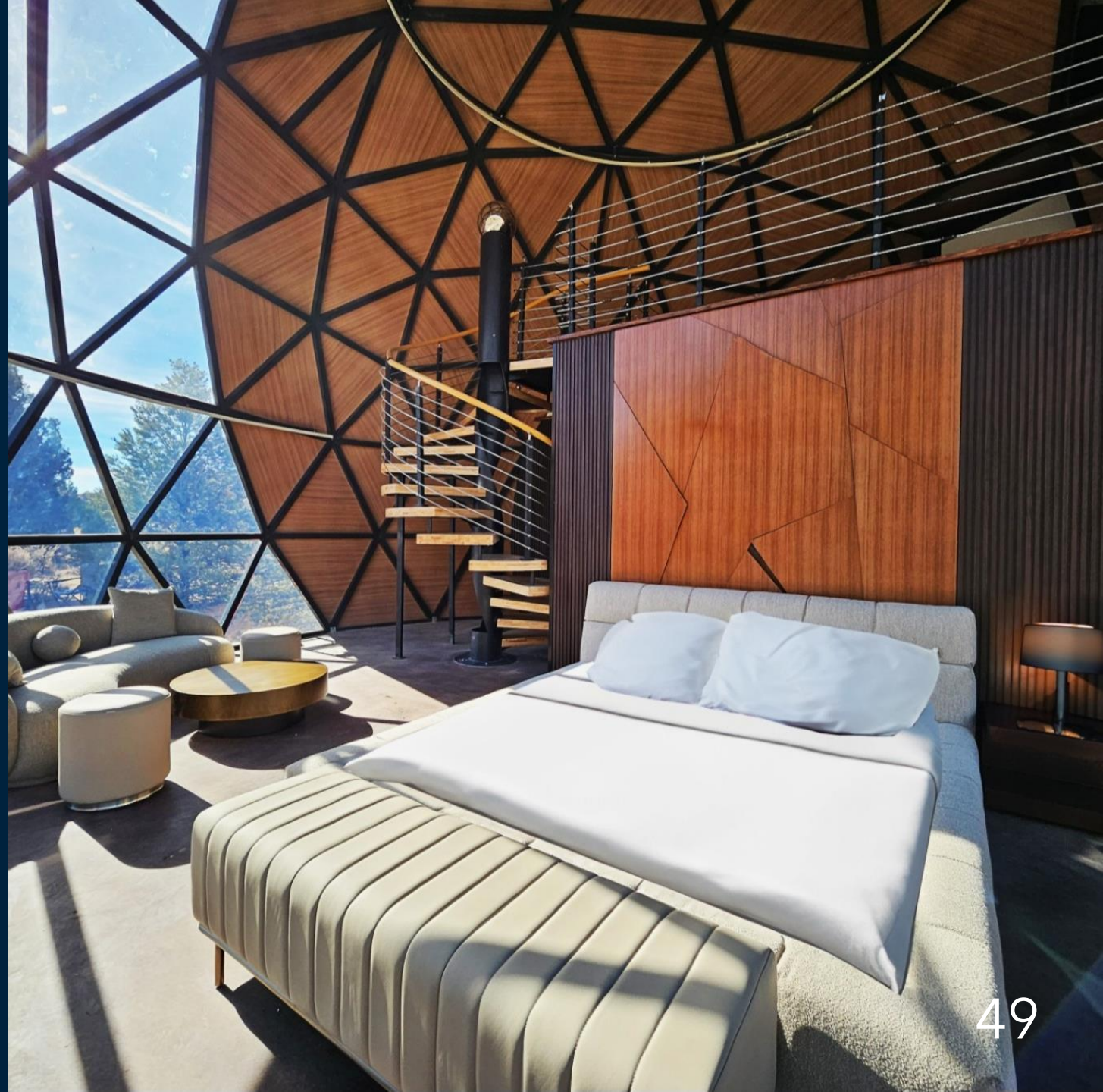


Note: San Francisco-Oakland-San Jose shortened to San Francisco-Oakland. Tampa-St. Petersburg-Sarasota shortened to Tampa-St. Petersburg.



# Utah Regional Snapshots

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# Northern Utah Visitor Summary

Home to Utah's biggest cities, Northern Utah has a strong repeat visitor base, leaving visitors wanting to come back for more.

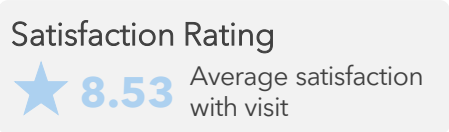
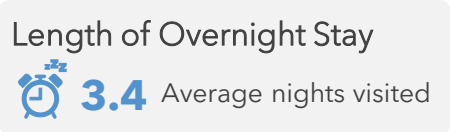
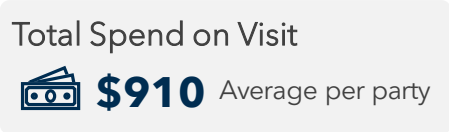
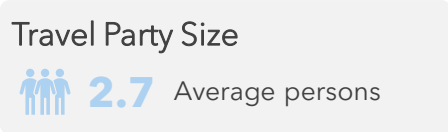
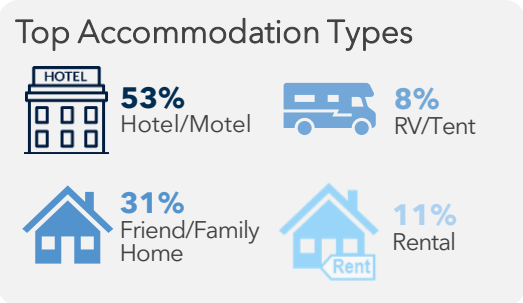
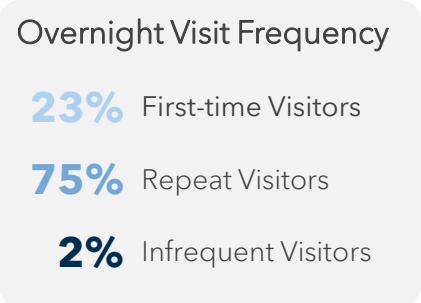
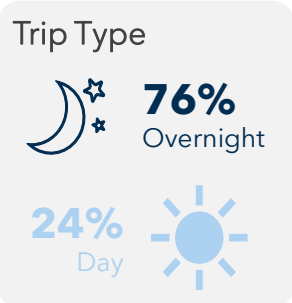
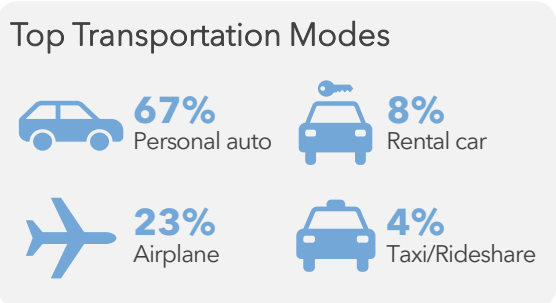
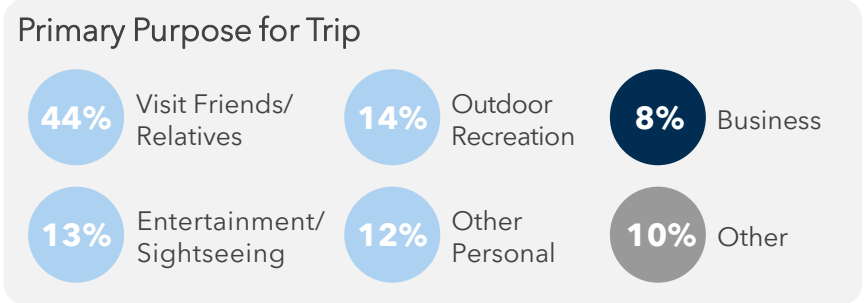
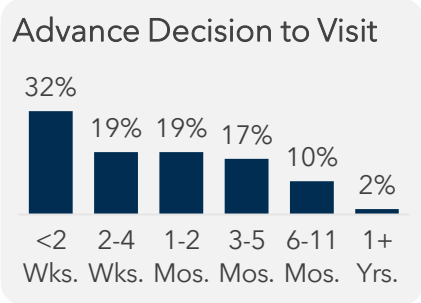
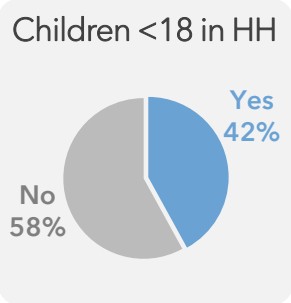
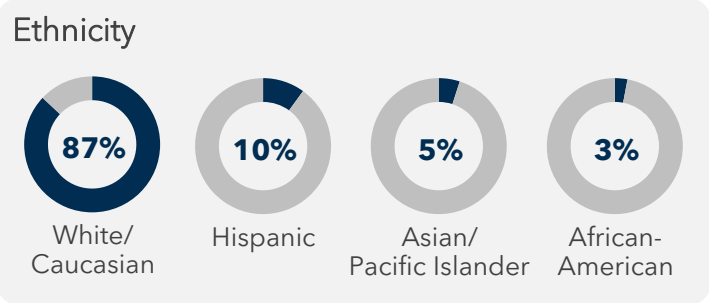
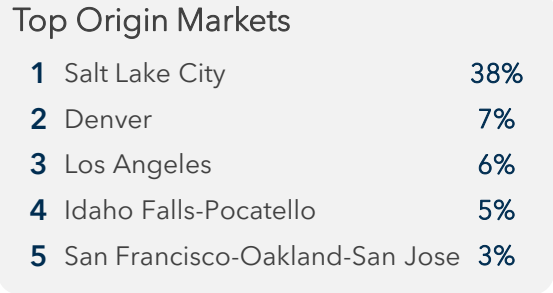
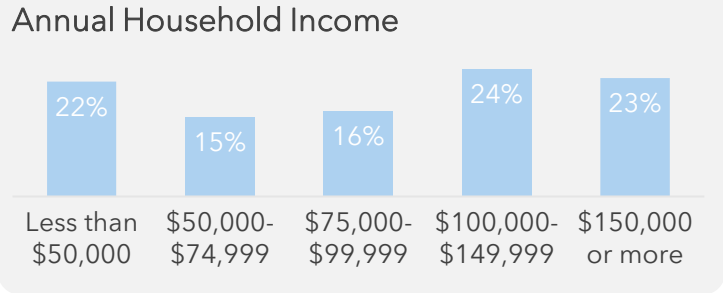
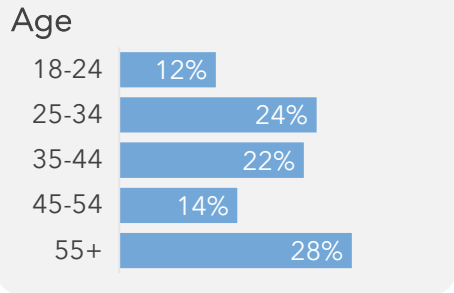
A large portion of visitors to the region come to visit friends/relatives, often staying overnight in a friend or family member's home.

Although a third of trips to Northern Utah tend to be spontaneous (deciding to visit less than 2 weeks before the trip), visitors spend more and stay longer than the average Utah visitor.

Nearly one-fifth (18%) of Northern Utah visitors reported also visiting a destination in the Southern region of the state.



# Northern Utah Visitor Snapshot | CY 2023



Notes: For Visit Frequency, frequent visitors have visited more than once before in the past 3 years and infrequent have visited before but not in the past 3 years. Sample Size (n) = 326

# Southern Utah Visitor Summary

Featuring Utah's Mighty 5, more visitors to Southern Utah come for Outdoor Recreation than for any other primary purpose of trip.

With its delicate landscapes, iconic national parks, scenic byways, red rock sculptures and some of the world's most iconic places to visit, the region is a popular draw for first-timer visitors.

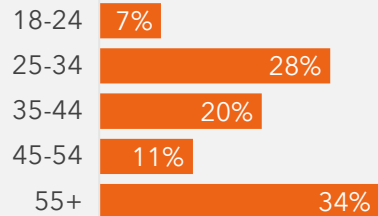
Not only does the region register a high level of visitor satisfaction, but it also achieves a high level of recommendations as a place to visit.

About a quarter (23%) of Southern Utah visitors reported also visiting a destination in the Northern region of the state.

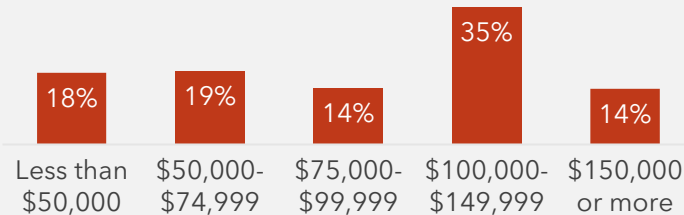


# Southern Utah Visitor Snapshot | CY 2023

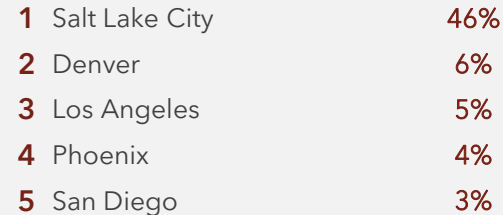
## Age



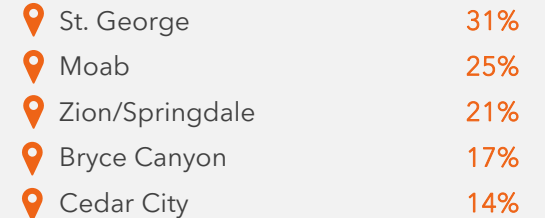
## Annual Household Income



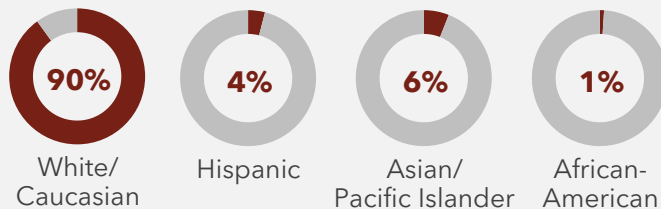
## Top Origin Markets



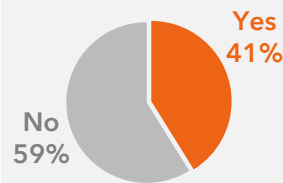
## Top Southern Utah Destinations



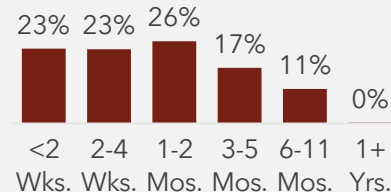
## Ethnicity



## Children <18 in HH



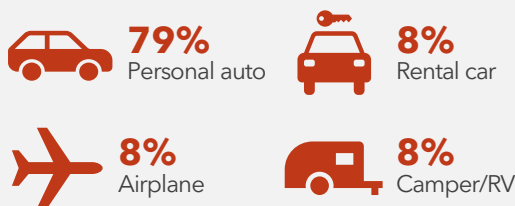
## Advance Decision to Visit



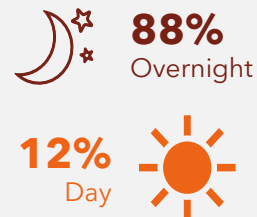
## Primary Purpose for Trip



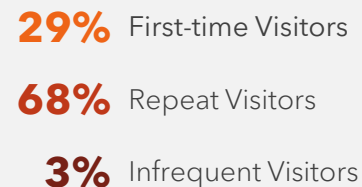
## Top Transportation Modes



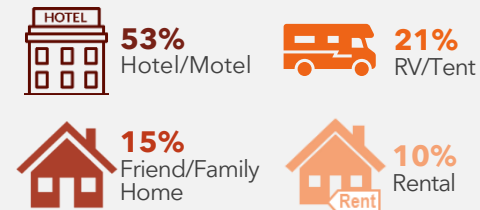
## Trip Type



## Overnight Visit Frequency



## Top Accommodation Types



## Top Motivations for Visit



## Travel Party Size



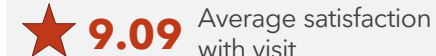
## Total Spend on Visit



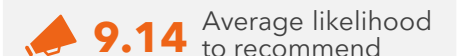
## Length of Overnight Stay



## Satisfaction Rating



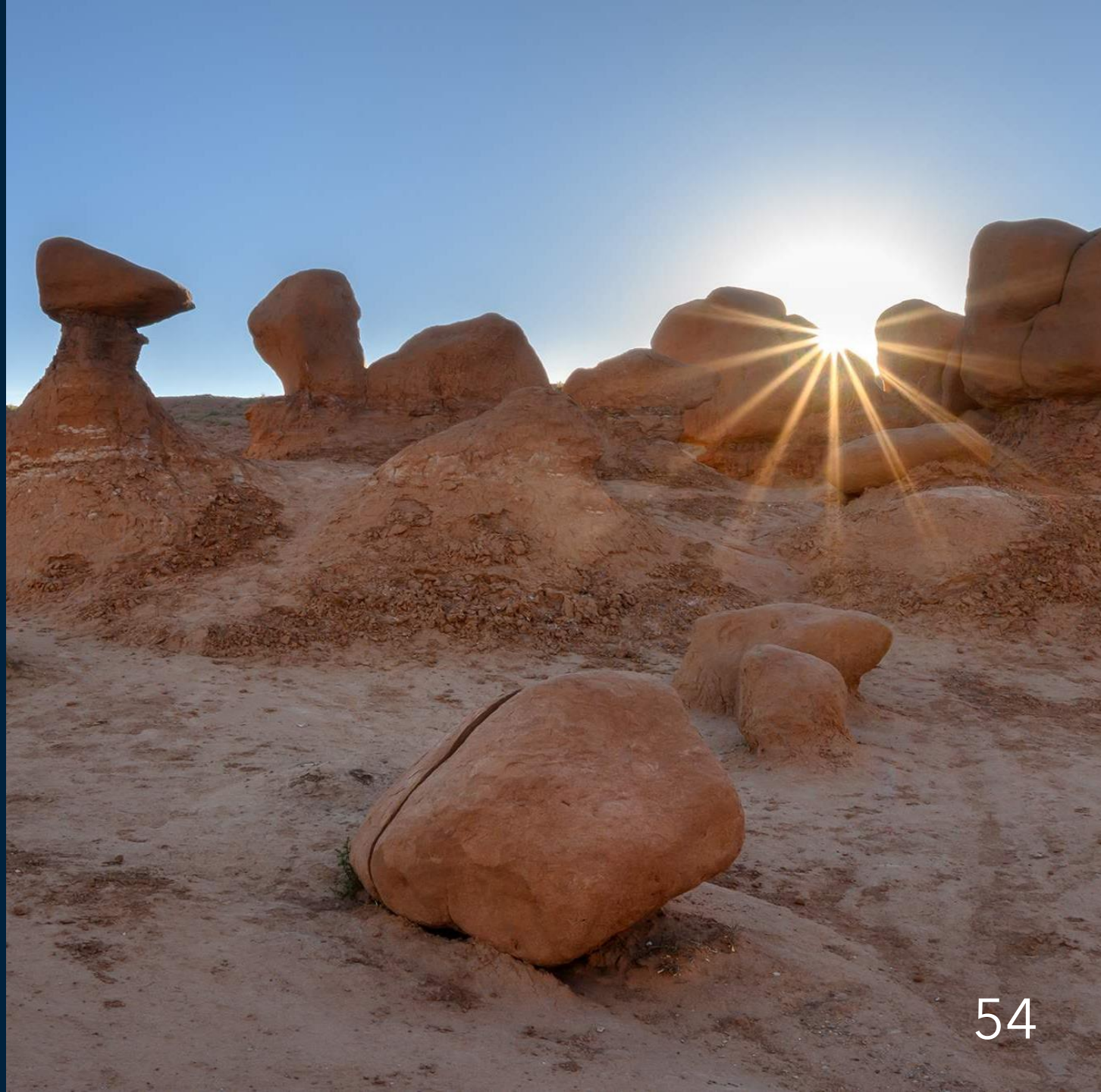
## Recommendation Rating



Notes: For Visit Frequency, frequent visitors have visited more than once before in the past 3 years and infrequent have visited before but not in the past 3 years. Sample Size (n) = 259

# Performance Indicators

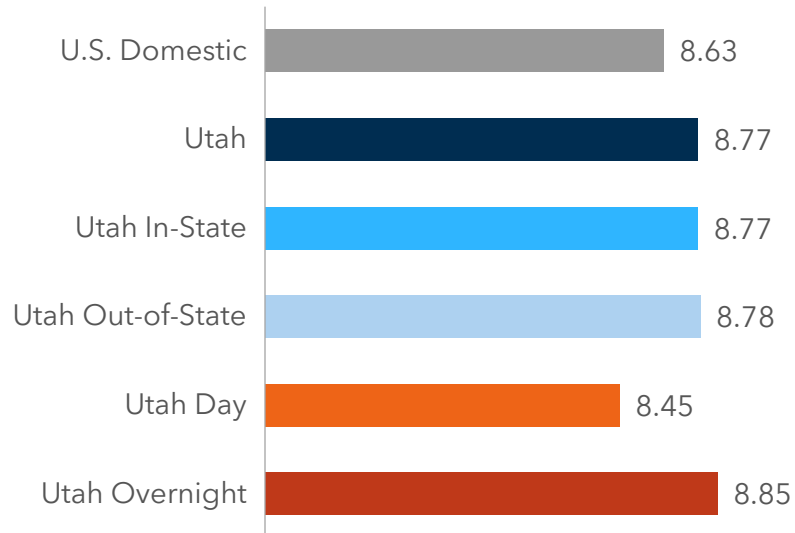
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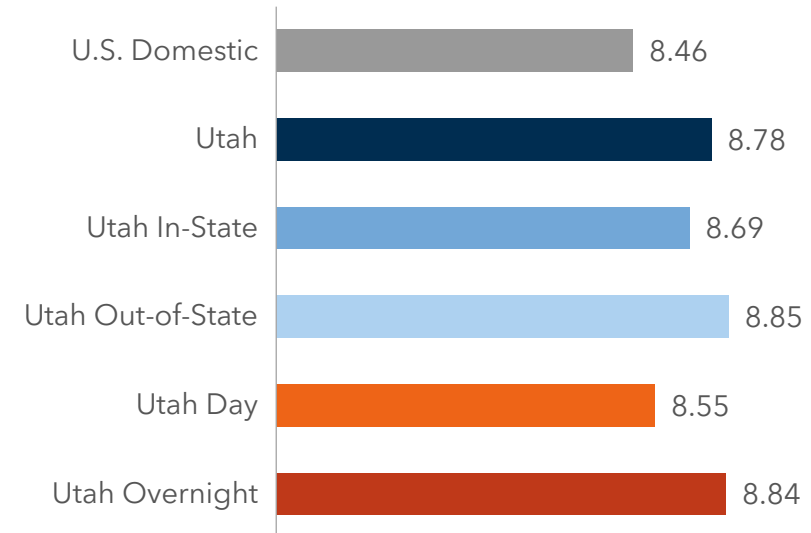
# Visitors to Utah had a higher trip satisfaction and were more likely to recommend the destination than U.S. domestic travelers

## Performance Indicators Among Leisure Visitors

### Average Satisfaction with Visit



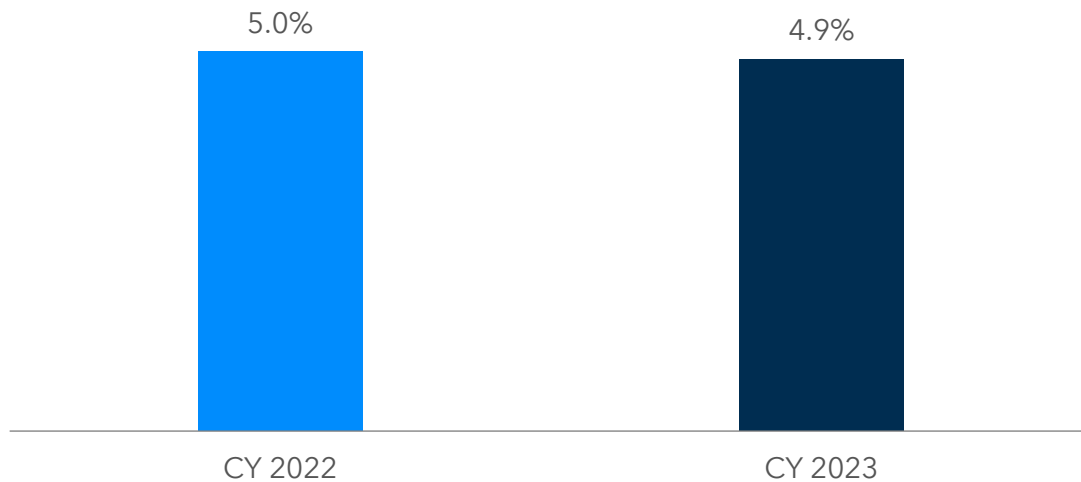
### Average Likelihood to Recommend



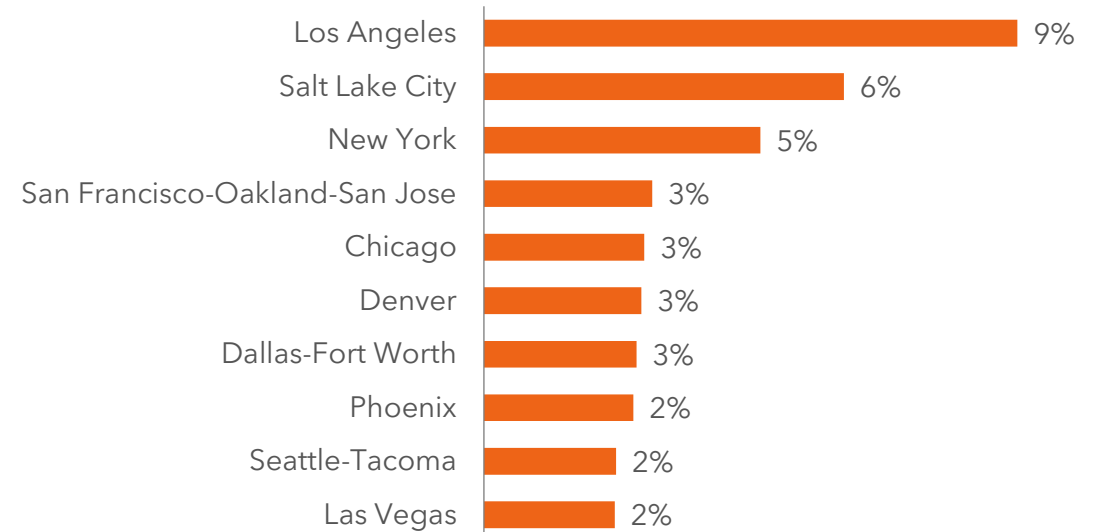
# Utah leisure travel intent steadied in 2023 and is strongest among travelers residing in Los Angeles and Salt Lake City

## Leisure Travel Intent

Utah Leisure Travel Intent Next Two Years



Top DMAs for Leisure Intent to Visit Utah in Next Two Years





# Demographics

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# Utah visitors were younger and had higher household incomes than U.S. domestic travelers in 2023

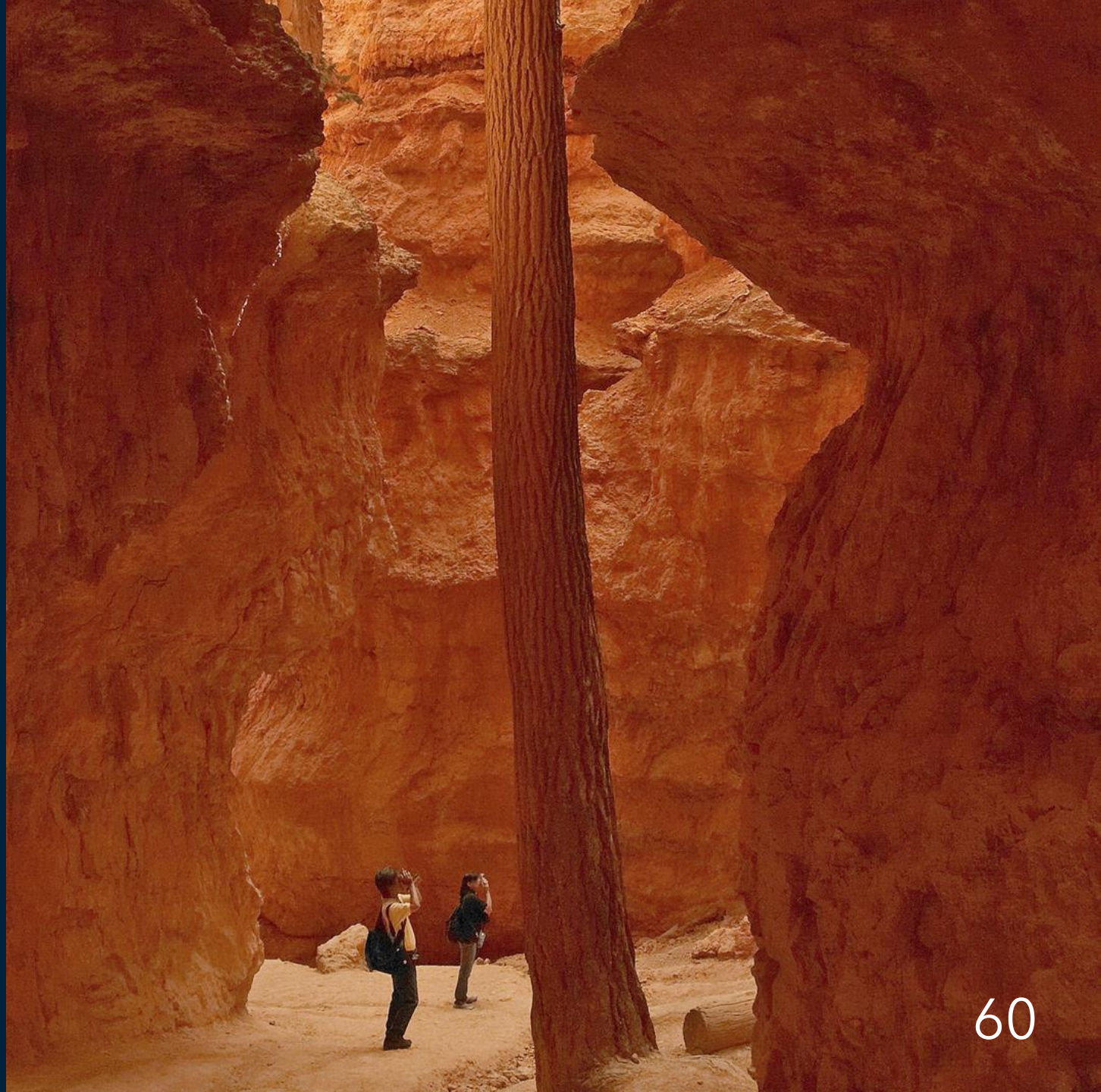
	U.S. Domestic Travel	Utah Visitors	Utah Business Visitors*	Utah Leisure Visitors	Utah Leisure In-State Visitors	Utah Leisure Out-of-State Visitors	Utah Leisure Day Visitors	Utah Leisure Overnight Visitors
<b>Age</b>								
18 - 24	7%	10%	8%	11%	17%	7%	12%	10%
25 - 34	24%	27%	30%	26%	30%	24%	32%	26%
35 - 44	17%	20%	21%	19%	22%	18%	23%	19%
45 - 54	16%	12%	19%	11%	9%	12%	8%	11%
55+	36%	31%	22%	32%	22%	39%	25%	34%
Average	46.8	44.3	42.5	44.5	40.3	47.2	41.8	45.1
<b>Income</b>								
Less than \$50,000	23%	20%	23%	19%	18%	20%	21%	17%
\$50,000 - \$74,999	20%	18%	0%	20%	24%	17%	21%	20%
\$75,000 - \$99,999	15%	14%	16%	15%	18%	13%	15%	14%
\$100,000 - \$149,999	25%	29%	34%	29%	33%	26%	27%	31%
\$150,000 or more	17%	18%	27%	17%	7%	24%	17%	18%

# Utah visitors were more likely to be married and have young children than domestic travelers

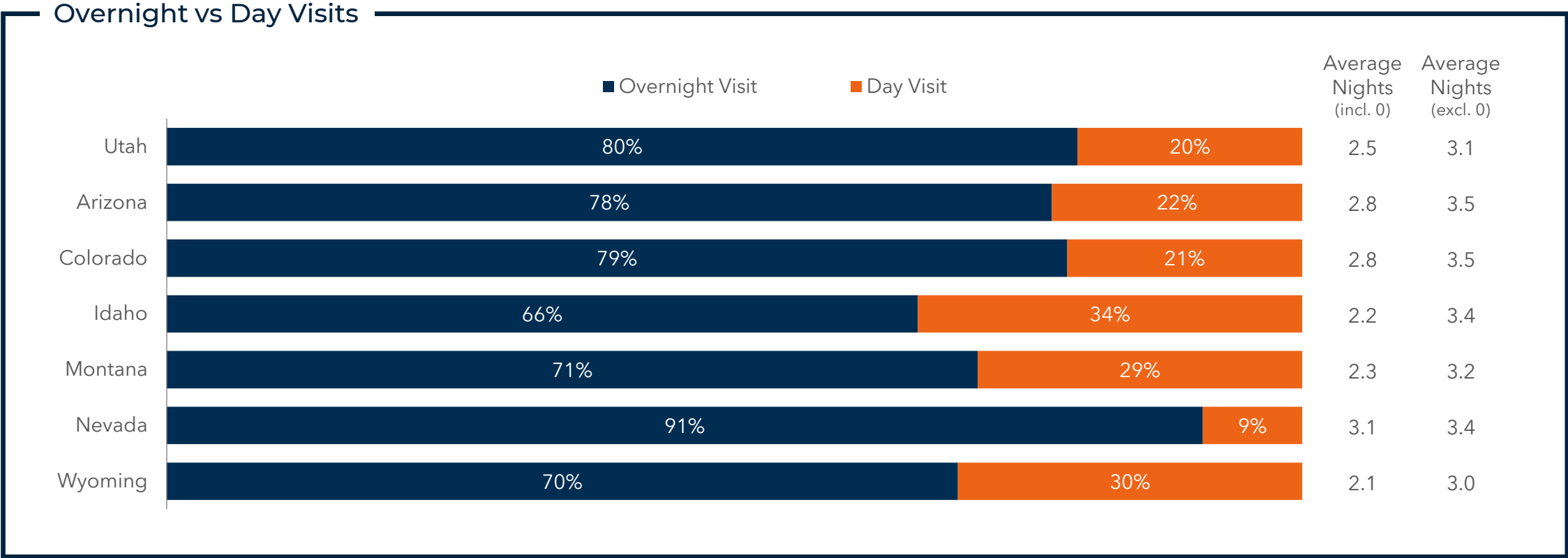
	U.S. Domestic Travel	Utah Visitors	Utah Business Visitors*	Utah Leisure Visitors	Utah Leisure In-State Visitors	Utah Leisure Out-of-State Visitors	Utah Leisure Day Visitors	Utah Leisure Overnight Visitors
<b>Marital Status</b>								
Now married	57%	63%	63%	64%	63%	64%	73%	63%
Never married	29%	28%	34%	27%	31%	24%	20%	28%
<b>Household Composition</b>								
One Person	40%	34%	63%	32%	30%	33%	24%	32%
Two People	36%	37%	28%	38%	33%	41%	40%	38%
Three People	11%	14%	6%	15%	17%	14%	19%	14%
Four People	9%	8%	3%	9%	9%	8%	10%	9%
Five or More People	4%	6%	0%	7%	11%	4%	8%	7%
<b>Children in Household</b>								
Have Children Under 18	37%	42%	40%	42%	51%	36%	56%	39%
<b>Ethnicity</b>								
White/Caucasian	82%	89%	85%	90%	97%	86%	90%	90%
African-American	7%	2%	2%	2%	1%	3%	1%	2%
Asian/Pacific Islander	6%	5%	6%	5%	1%	7%	4%	5%
Hispanic	9%	8%	10%	8%	3%	12%	8%	9%

# Competitive Environment

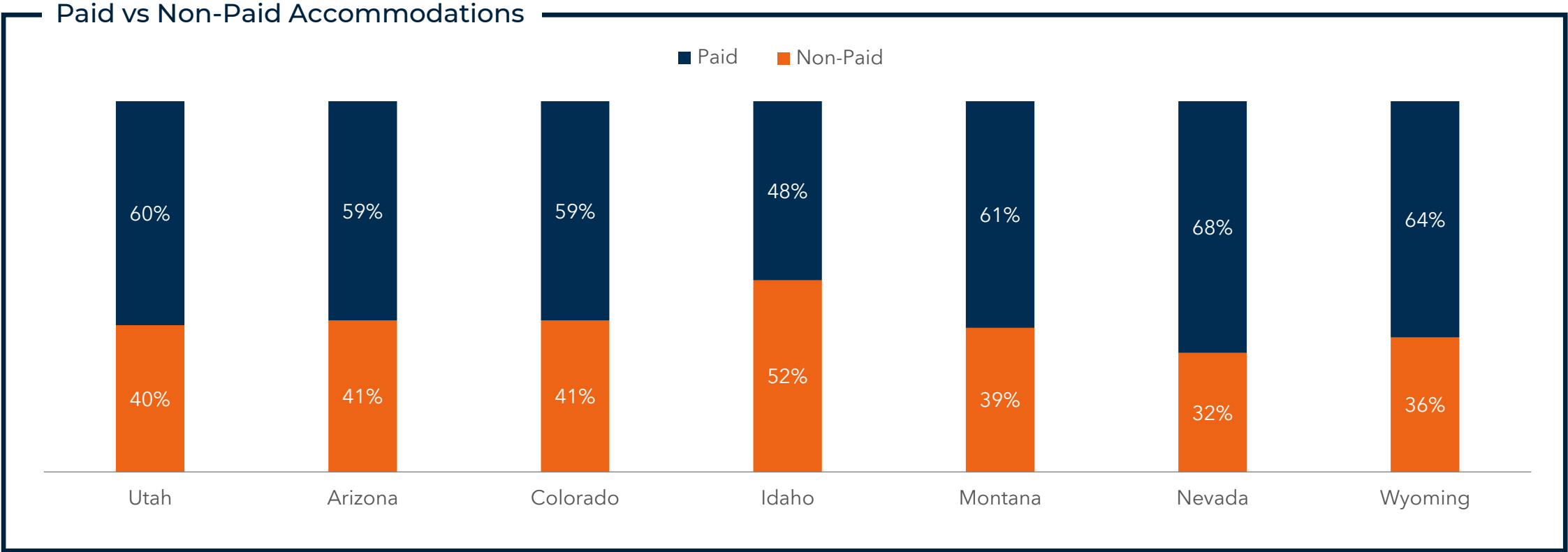
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# Utah visitors were more likely to stay overnight than visitors to any other regional competitor except Nevada

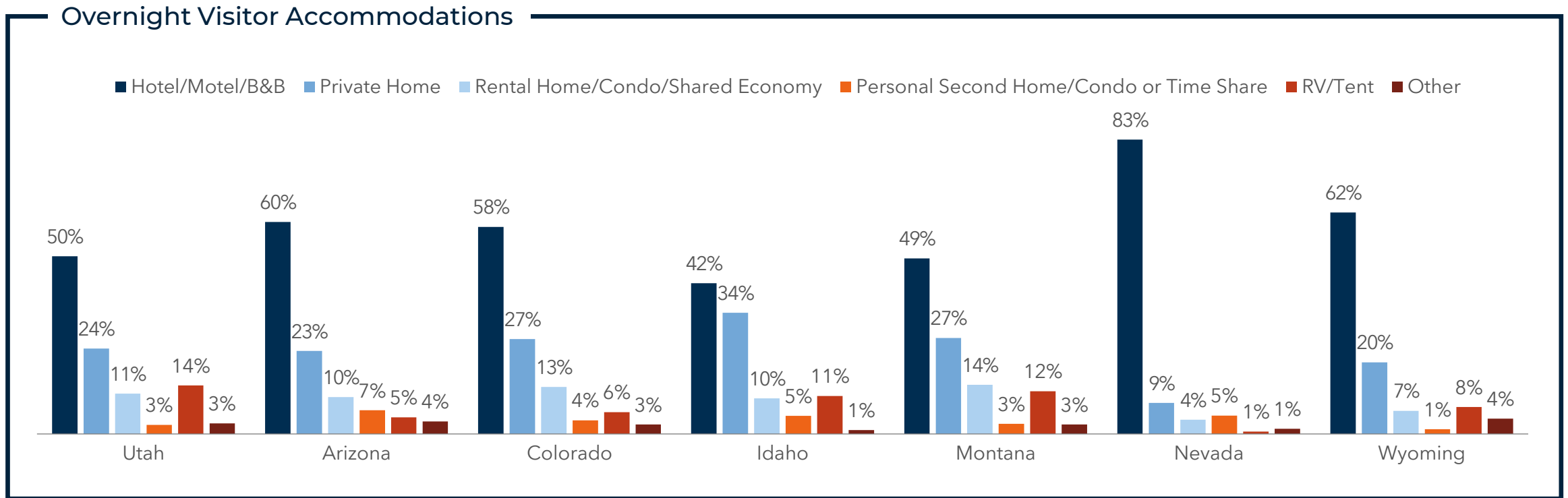


60% of visitors to Utah choose to stay in paid accommodations, which was middle of the pack among its competitive set

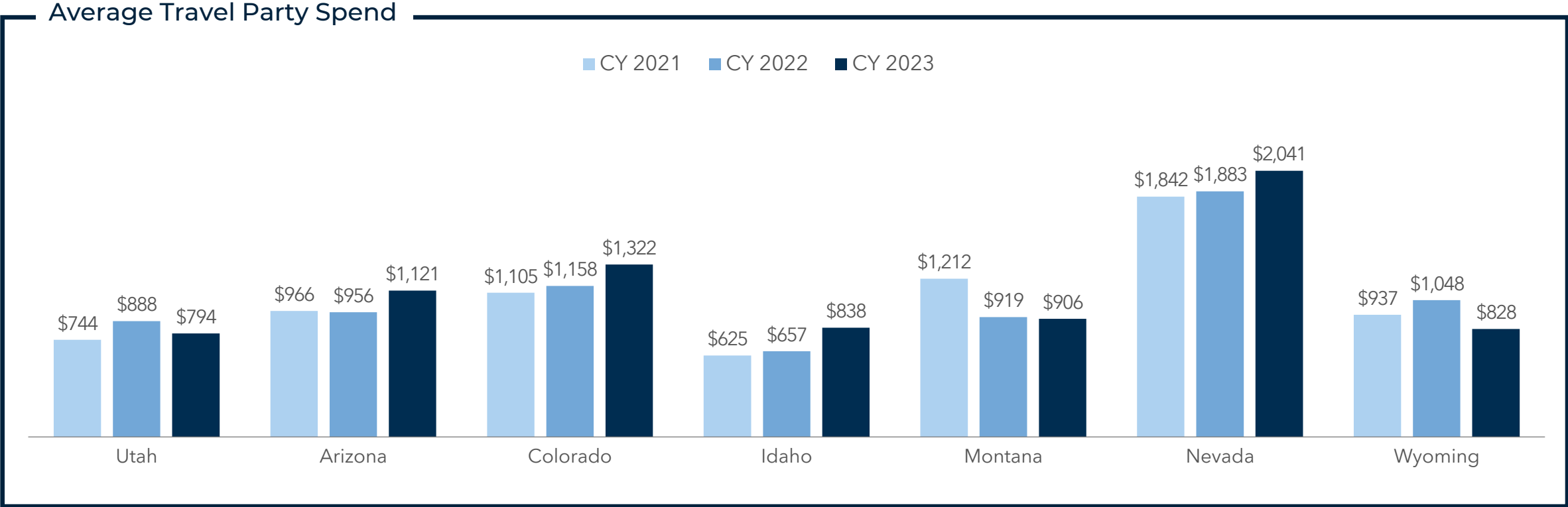


# Half of Utah visitors stay in a hotel/motel/B&B

Among its competitive set, Utah ranks middle of the pack in terms of proportion of overnight visitors that stay in a hotel/motel/B&B and private home. However, compared to its regional competitors, Utah had the highest share of visitors that stay in an RV/tent (14%).



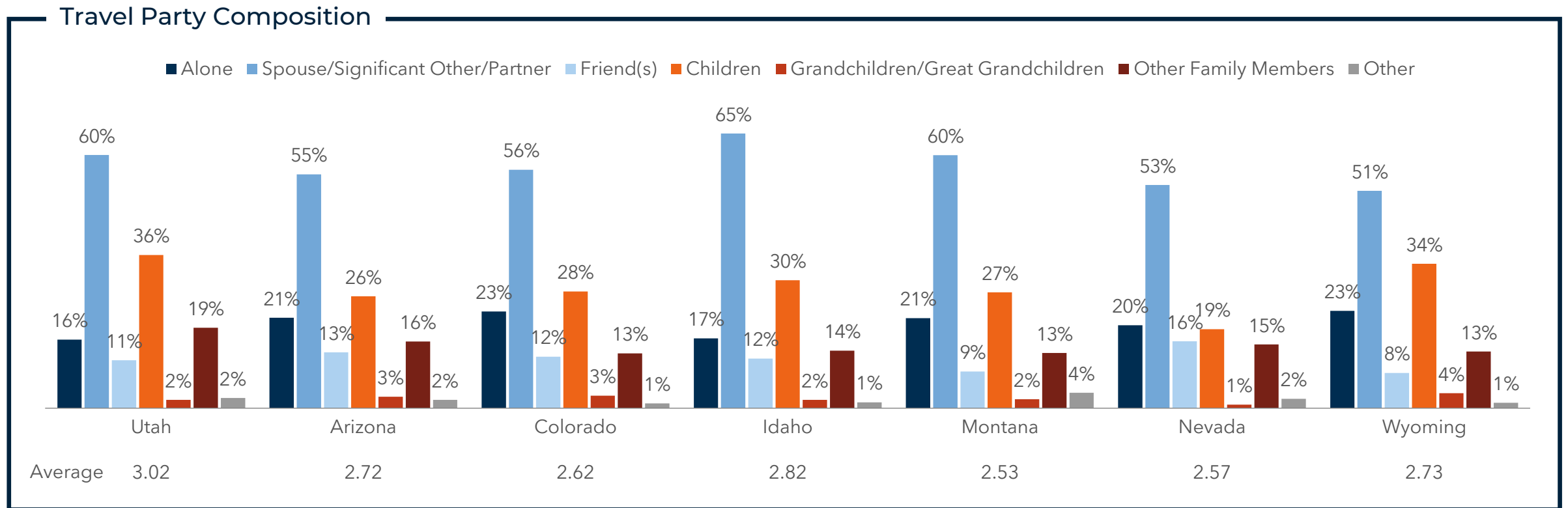
# Travel parties visiting Utah spent nearly \$800 on their trip



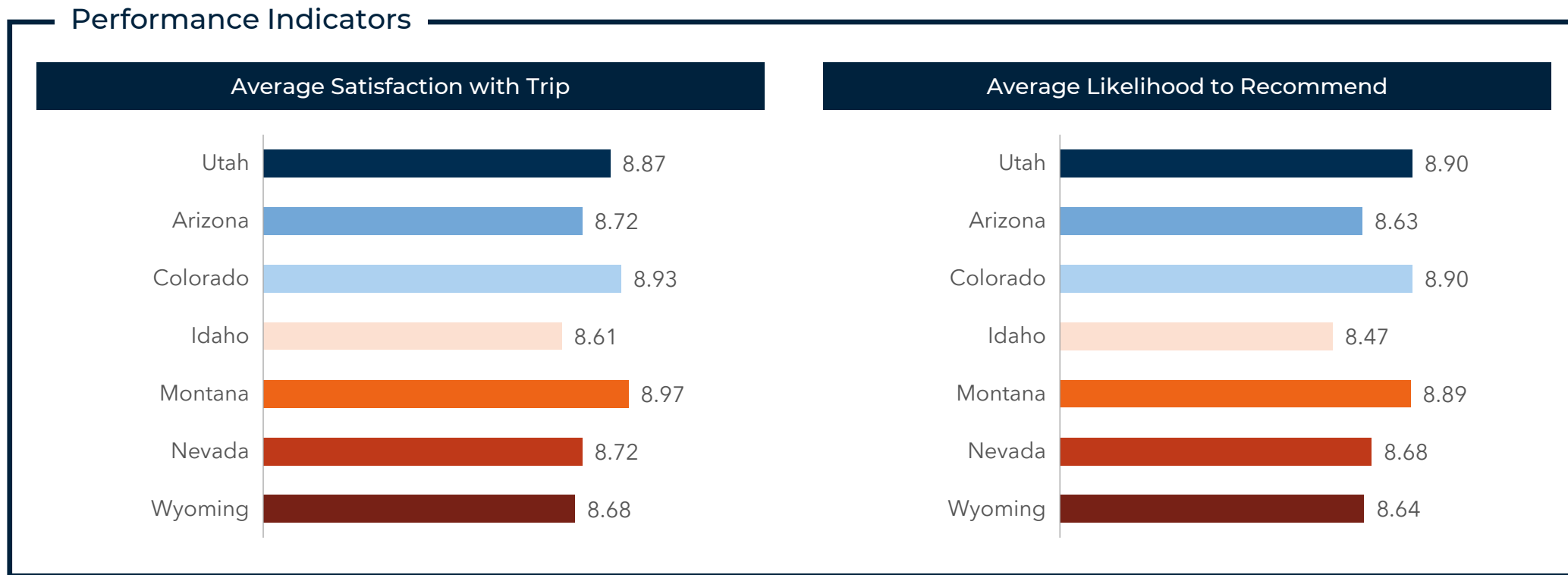
Note: Spend within state excludes amount spent on transportation to get to the state.



# Utah visitors were less likely to travel alone than any other regional competitor, driving larger travel party sizes

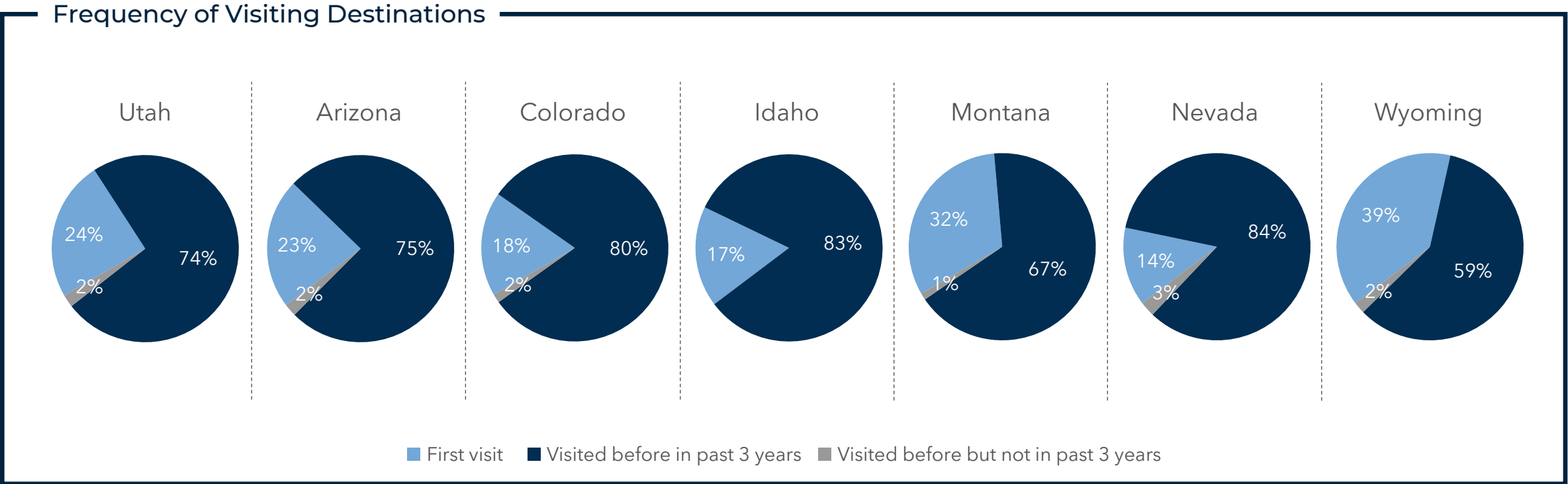


While Utah trails Colorado and Montana in terms of satisfaction, it is at the top of its competitive set, in terms of likelihood to recommend



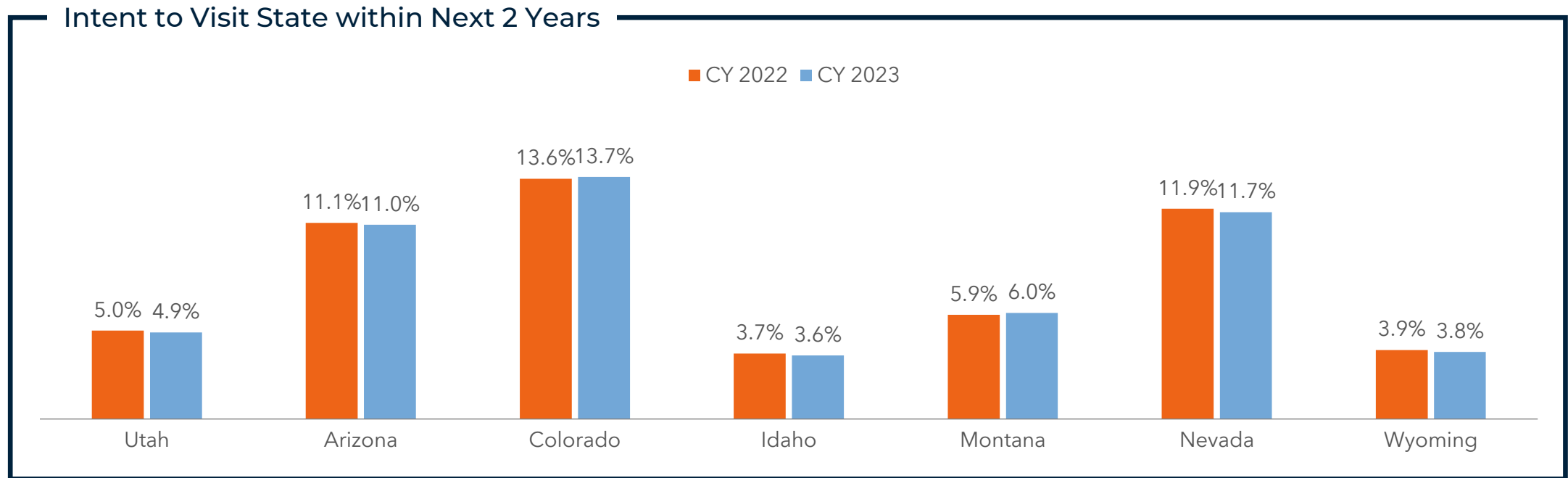
Notes: Ratings for satisfaction and likelihood to recommend filtered to only reflect leisure visitors.

# Utah attracted first-time visitors to the state in 2023 at a higher rate than all but two competitors - Wyoming and Montana



Note: Ratings only reflect leisure, overnight visitors.

# After a decline in the previous year, leisure travel intent to Utah and its competitors steadied in 2023



Note: Figures based on all respondents qualifying as a traveler for the survey by having traveled in the past year.

# On average, Utah's visitors were younger than each of the destinations in its competitive set

	Utah Visitors	Arizona Visitors	Colorado Visitors	Idaho Visitors	Montana Visitors	Nevada Visitors	Wyoming Visitors
<b>Age</b>							
18 - 24	10%	7%	8%	6%	7%	7%	6%
25 - 34	27%	22%	26%	25%	22%	20%	16%
35 - 44	20%	21%	20%	19%	13%	19%	13%
45 - 54	12%	17%	15%	16%	17%	16%	20%
55+	31%	32%	31%	34%	41%	38%	45%
Average	44.3	46.4	45.1	46.0	48.3	47.8	50.6
<b>Income</b>							
Less than \$50,000	20%	24%	19%	27%	27%	18%	25%
\$50,000 - \$74,999	18%	19%	19%	16%	22%	16%	24%
\$75,000 - \$99,999	14%	13%	14%	17%	13%	16%	10%
\$100,000 - \$149,999	29%	23%	26%	26%	21%	28%	25%
\$150,000 or more	18%	21%	21%	13%	18%	23%	16%

# Utah visitors were more likely to be married and have young children than nearly all competitors

	Utah Visitors	Arizona Visitors	Colorado Visitors	Idaho Visitors	Montana Visitors	Nevada Visitors	Wyoming Visitors
<b>Marital Status</b>							
Now married	63%	56%	56%	60%	65%	55%	59%
Never married	28%	31%	30%	25%	24%	32%	23%
<b>Household Composition</b>							
One Person	34%	40%	39%	35%	37%	43%	39%
Two People	37%	37%	40%	42%	40%	39%	35%
Three People	14%	9%	9%	9%	11%	8%	11%
Four People	8%	10%	10%	9%	6%	8%	7%
Five or More People	6%	4%	2%	5%	5%	2%	8%
<b>Children in Household</b>							
Have Children Under 18	42%	39%	39%	35%	32%	34%	40%
<b>Ethnicity</b>							
White/Caucasian	89%	81%	86%	91%	93%	71%	92%
African-American	2%	4%	4%	1%	1%	8%	1%
Asian/Pacific Islander	5%	8%	6%	3%	2%	14%	3%
Hispanic	8%	14%	13%	8%	3%	14%	6%

# Methodology

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# TravelTrakAmerica Syndicated Research

TravelTrakAmerica is a comprehensive national travel study of U.S. households focusing on domestic travel. The syndicated study collects general information on travelers (e.g., demographics, perceptions, travel intent) and detailed information about past-month travel.



## Methodology:

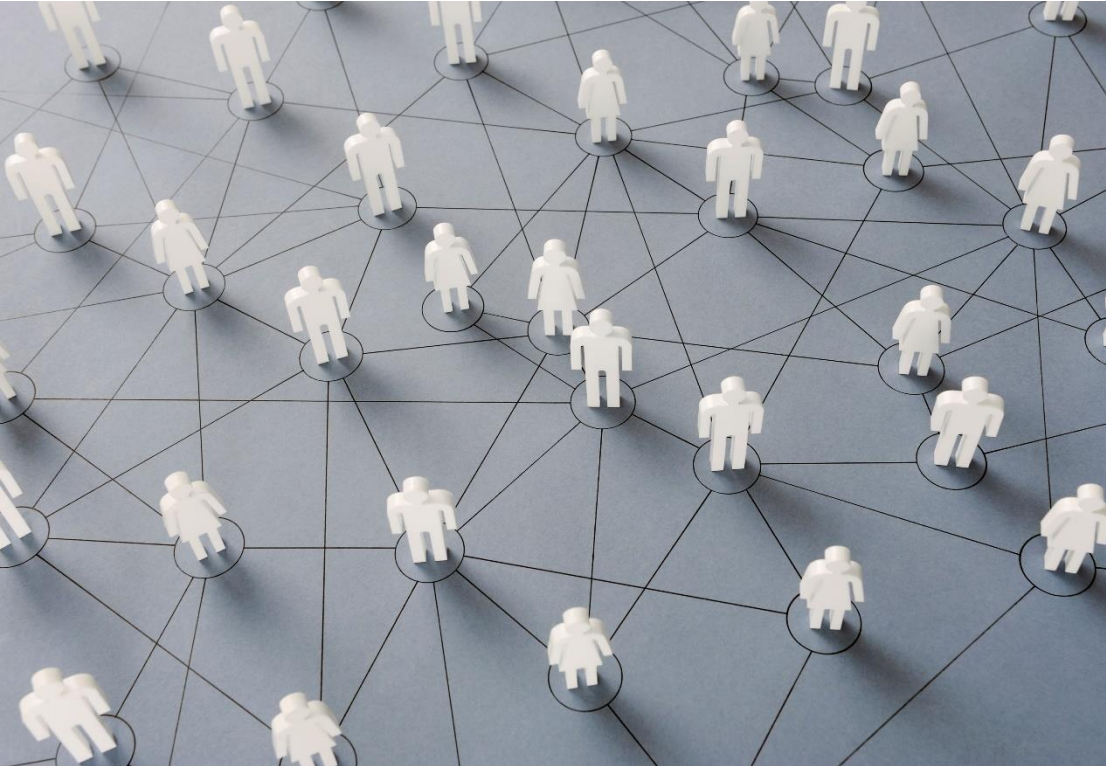
Omnitrak sources survey respondents from a single managed panel provider to administer the monthly TravelTrakAmerica survey to a nationally representative sample of U.S. households.

Each month a variety of general information (e.g., demographics, perceptions, travel intent, etc.) is collected from more than 9,000 U.S. travelers. “Travelers” are defined as having taken one or more trip(s) more than 50 miles from home (each-way, excluding commuters) during the past 12 months.

Details about trips taken during the past-month are collected from approximately 4,000 travelers who took at least one trip in the prior month. To ensure the survey captures all destinations visited to the best of its ability, when asked where they went in a state, respondents are provided with an option to type in the destination they visited.



# TravelTrakAmerica Sample



## Sample Collections: January - December

	2022 Unweighted	2022 Demographic Weighted	2023 Unweighted	2023 Demographic Weighted
Total U.S. Travelers Respondents	108,240	113,901	108,240	112,675
Total U.S. Domestic Travelers	48,114	51,545	45,173	47,815
Total Utah Visitors	411	610	423	571
Utah In-State Visitors	139	238	139	228
Utah Out-of-State Visitors	272	372	284	343

# TravelTrakAmerica Client Service Team



**Chris Kam**

President & COO

Chris leads the overall continued evolution of the TravelTrakAmerica syndicated data set, incorporating new thinking from the marketplace and integrating new technology from Omnitrak's panel provider.



**Lydia Poole**

Research Manager

Lydia is the driving force who keeps TravelTrakAmerica moving forward. She lives and breathes the syndicated data and enjoys engaging with clients to help them uncover insights. Prior to joining Omnitrak, Lydia worked for VISIT FLORIDA.



**Levi Tamosaitis**

Data Analyst & Statistician

Levi lives for analyzing large, record-level datasets and ensuring that everything TravelTrakAmerica is "mathematically correct". Prior to joining Omnitrak, Levi worked for the South Carolina Department of Parks, Recreation & Tourism.

# Glossary

Term	Definition
Origin DMA	Designated Market Area: Areas where respondents live that share the same primary TV broadcast signals (210 DMAs in US).
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).
Trip	Travel 50+ miles (one-way) away from home or overnight. Excludes commuters or commercial travel (i.e., flight attendants, commercial vehicle operator).
U.S. Travelers	U.S. residents who have taken at least one "trip" during the past 12 months.
U.S. Domestic Travel	U.S. residents who visited at least one U.S. destination on a "trip".
Utah Visitor	A U.S. traveler who visited Utah during the specified time period.
Niche Vacation Motivation	An activity or group of activities a Utah visitor participated in during their visit, where the niche activity or at least one activity within the niche activity group was a primary or secondary reason for their visit. Niche vacation motivations listed below with activities defining each.
Outdoor Recreationalists	Activities include camping, biking, fishing, horse riding, kayaking/canoeing/paddleboarding, sailing, ATV/4-wheeling, golf, boating, other snow activities
Adventure Seekers	Activities include hang gliding/skydiving/base jumping, hiking/backpacking/canyoneering, mountain biking, mountain climbing, skiing/snowboarding, whitewater rafting, water skiing, windsurfing/kiteboarding
Nature & Rural Explorers	Activities include bird watching, nature travel/eco-touring, wildlife viewing, other nature, farms/agri-tours, rural sightseeing
Arts & Culture	Activities include art galleries, historic sites, Native American ruins, museums, theater, symphony/concert, music festival, local/folk art/craft, TV/movie location
Entertainment	Activities include urban sightseeing, zoos/aquariums, attractions, fine dining, unique local cuisine, gardens, nightclubs/dancing, wine tasting/winery, craft breweries, special event, major professional sports, amateur/collegiate/other sports events (spectator), shopping, spa/health club, motor sports
State/National Parks	Activities include state park/monument/recreation areas, national park/monument/recreation area
Family/Friends	Activities include visiting friends/relatives, family reunion

# Appendix

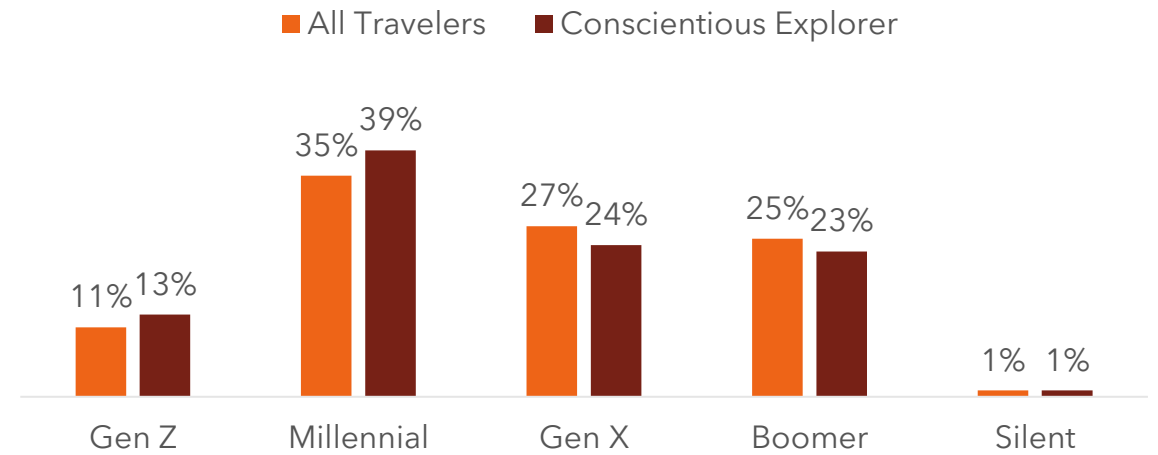
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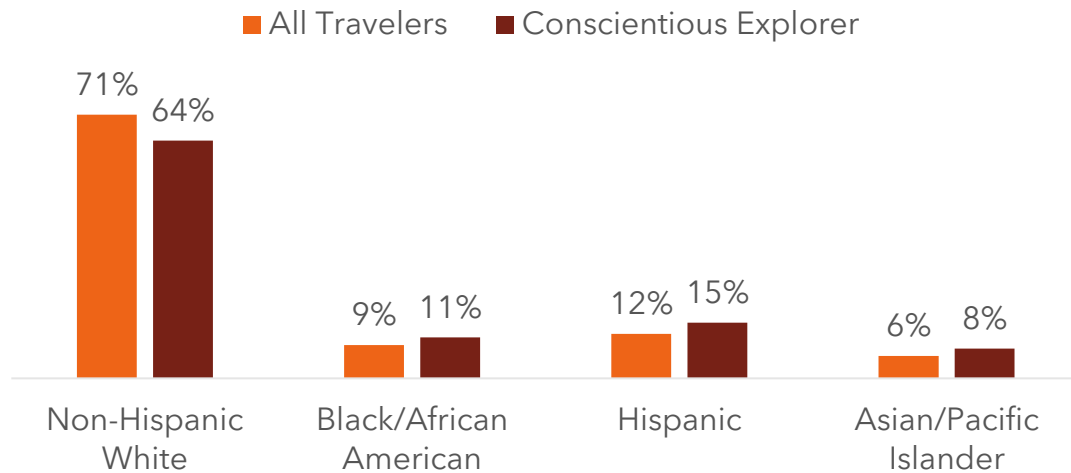
# The Conscientious Explorer

- They are younger, more diverse travelers
- Despite being younger travelers, their household income levels do not differ greatly from overall travelers

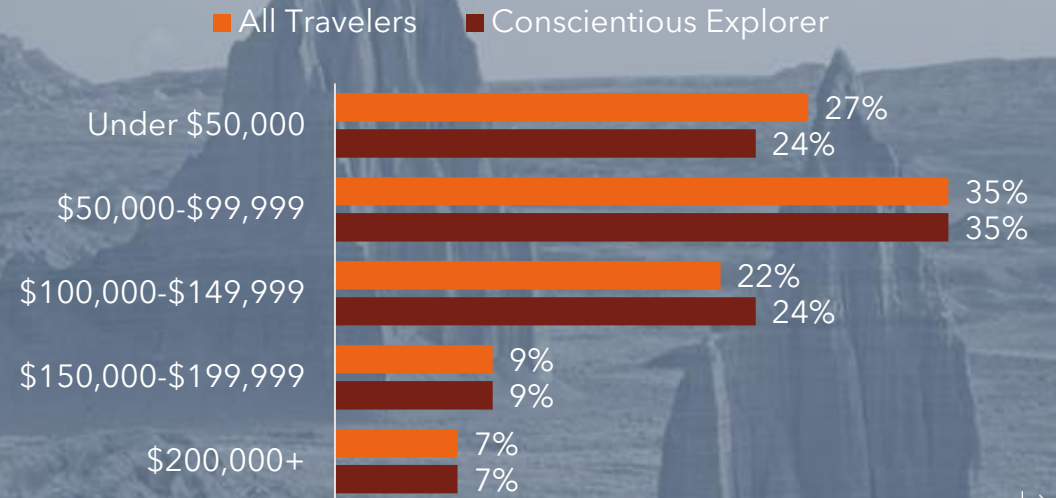
Generation



Race/Ethnicity



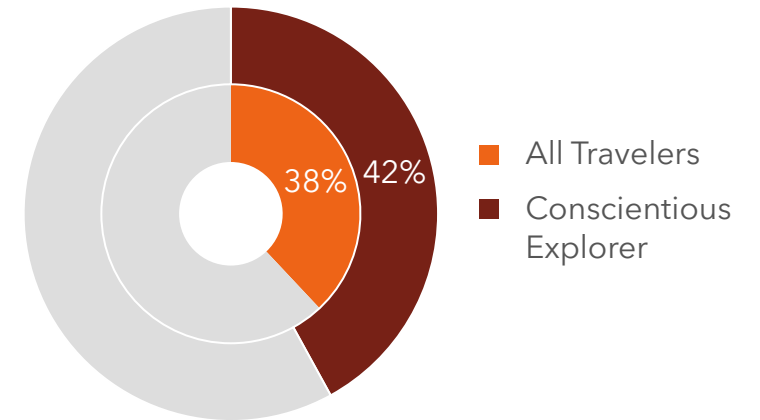
HH Income



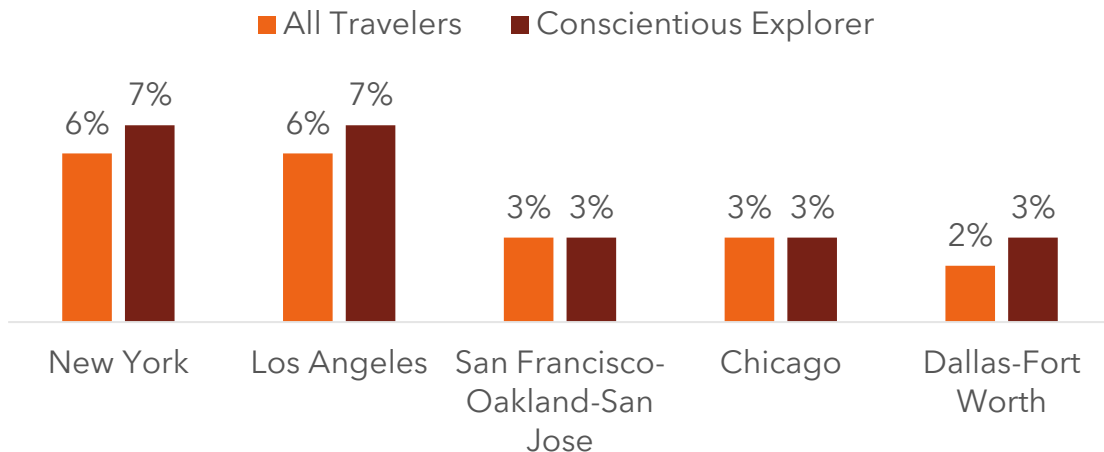
# The Conscientious Explorer

- Household more likely to have children under 18
- Origin markets do not differ greatly from overall travelers
- They are more curious, fast-paced, and open-minded than overall travelers

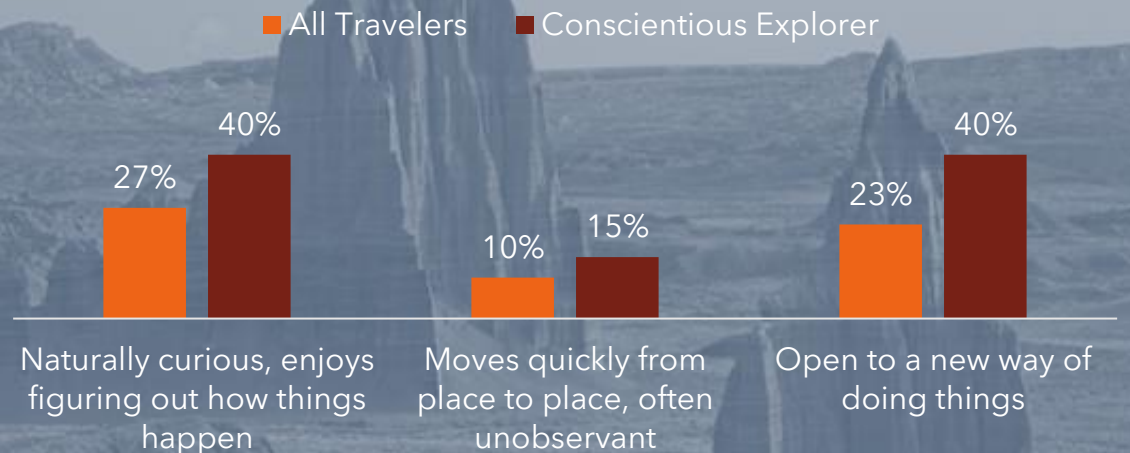
Children under 18 in Household



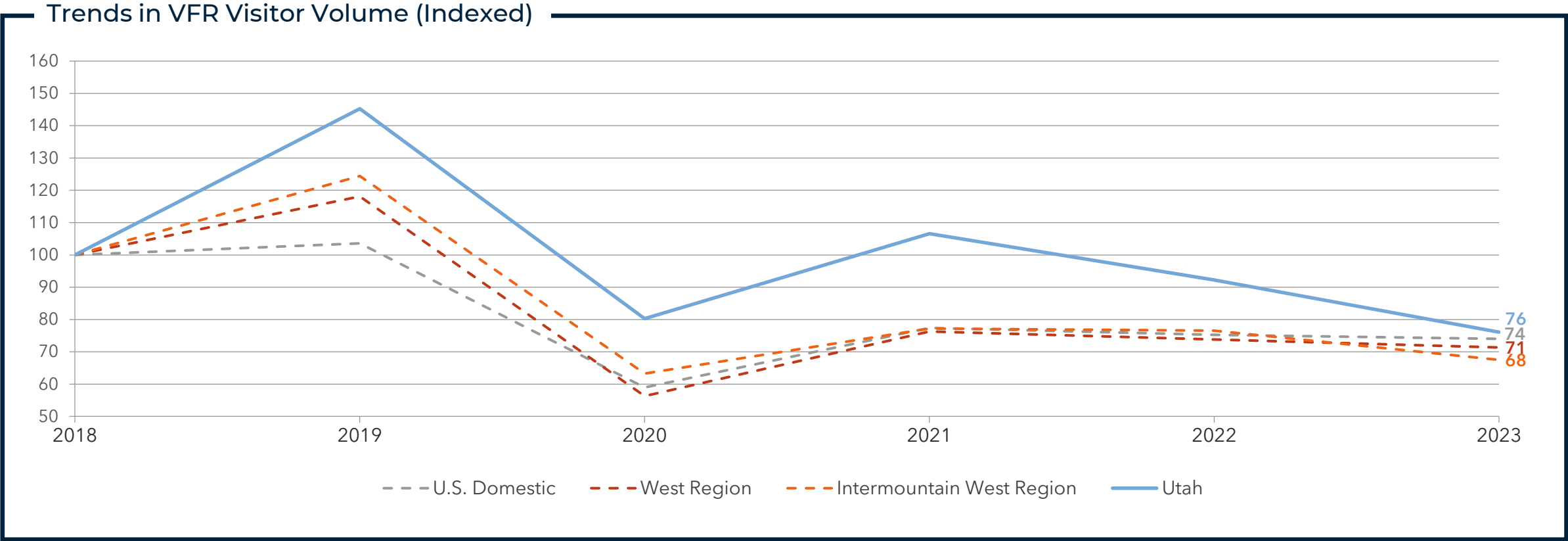
Top DMA Markets



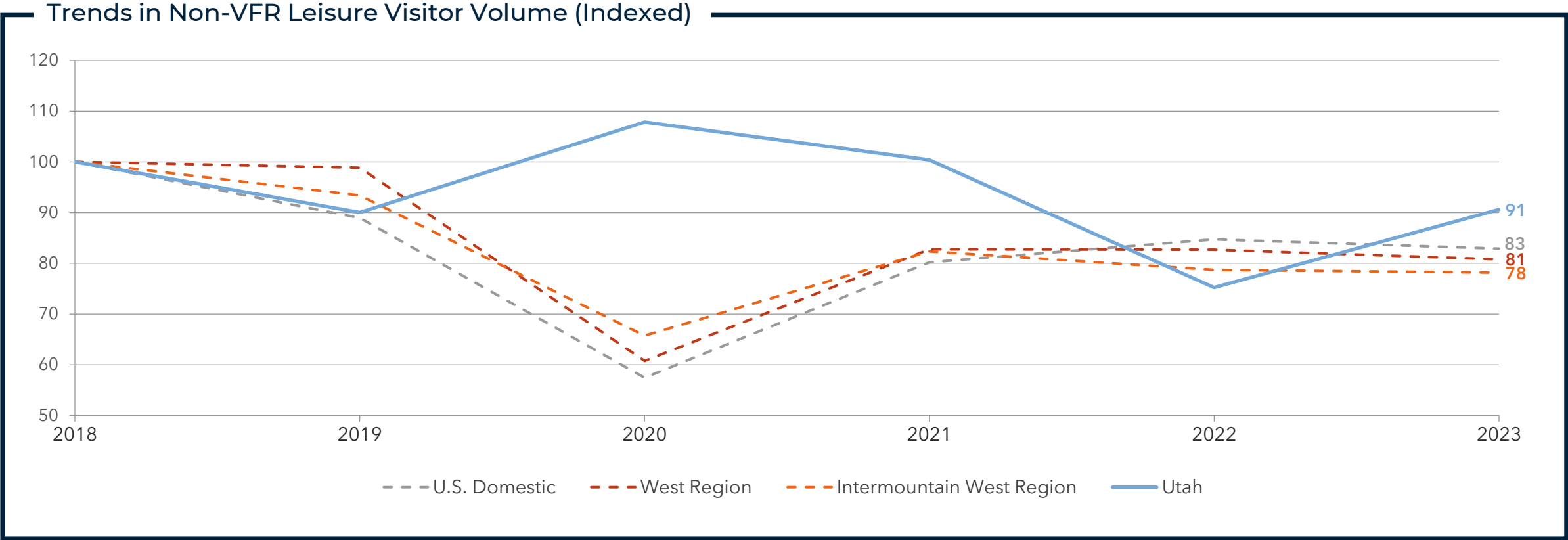
Characterizations



# Visitor volume among those traveling for VFR purposes indexed to 2018

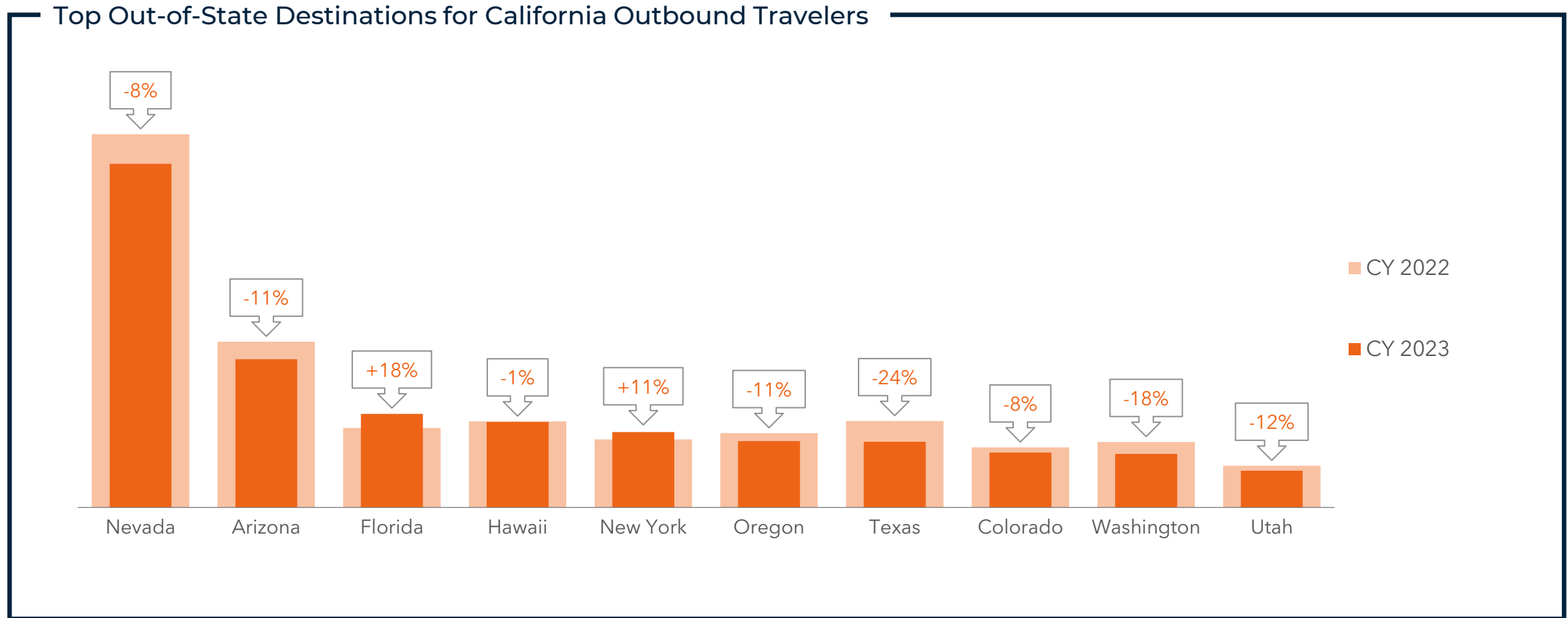


# Visitor volume among those traveling for Non-VFR Leisure purposes indexed to 2018





# California residents traveled out-of-state less than the year prior



\*Sample Size <30.