2019 Utah Visitor Profile & Insights Report

Prepared for the Utah Office of Tourism June 19, 2020

Omnitrak

UNEARTH AHA! INSIGHTS MASTER YOUR MARKET

Davies Pacific Center 1250, 841 Bishop Street, Honolulu, Hawai'i 96813
Telephone: 1-808-528-4050; Fax: 1-808-538-6227
www.omnitrak@omnitrakgroup.com

Contents

KEY TAKEAWAYS

Key Takeaways

1. **Proximity influences Utah travel.** The state itself and nearby Western states continue to be the dominate sources for visitor trips. Utah benefited from a large increase in residents traveling in-state, with over 2 million more residents exploring their home state, leading overall visitor volume to increase by 6.2% year-over-year. Given the challenges many states face as they emerge from the Coronavirus lockdown, relative proximity will likely have an even greater impact. For the Utah Office of Tourism, proximity offers greater flexibility in timing marketing efforts in response to situational changes and developing quick promotions to drive visitation.

2. **Niche activities motivate travel and generate revenue.** The Hard Adventure and State/National Parks emerge as lucrative niche segments, with each representing one-fifth of Utah leisure trips and potentially generating nearly a quarter (22%) of total Utah trip spend. To continue capitalizing on this niche segment, marketing efforts should initially focus on markets in closer proximity, while recognizing that farther away markets (i.e. NYC, Chicago, etc.) are home to a large portion of these niche travelers and will be important to growing Utah's visitor base down the road.

3. **Utah benefited from increased trip spending per travel party across all segments.** Spending among total Utah visitors reached an average of $520 per travel party/trip in CY 2019, an increase of 14.6% from the previous year. Going forward, the State/National Parks activity niche offers great potential value, spending an average of $1,120 per trip. This niche also fits well in the current COVID-19 travel landscape as outdoor experiences appear to be more of a primary motivator.

Report Overview

Report Overview

Brand/History

Utah Office of Tourism

- 7th Report for Utah Office of Tourism
- Continuous online data collection via TravelTrak America

Visitor Type

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

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

Profile

Visitor Characteristics:

- Source markets: State, DMA
- Demographics: age, children, employment, income, etc.

Trip Characteristics:

- Spending on Utah trip
- Length of stay
- Activities – including visitor profiling by niche activity
- Transportation
- Quarterly trends

Benefits

Niche Activity Visitor Segments:

- Understand visitor segments generating the highest yield within the state, where they come from, and their reasons for visiting

Competitive Analysis:

- Comparison of visitors to competitor states (Colorado, Arizona, Idaho, Wyoming, Montana, and Nevada) on market share, intent to visit, length of stay, satisfaction, spending, demographics, etc.

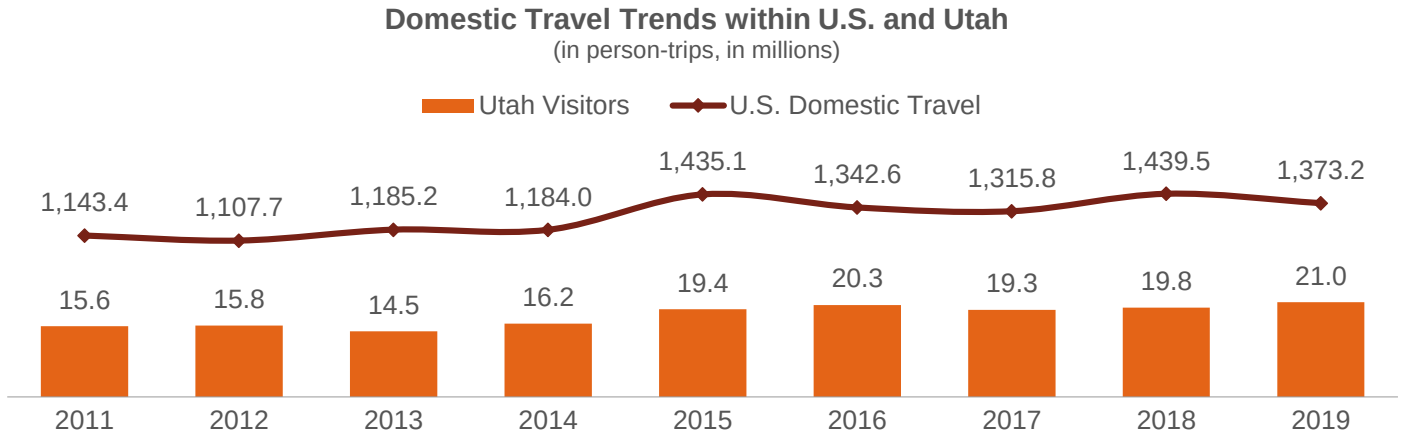
EXECUTIVE SUMMARY

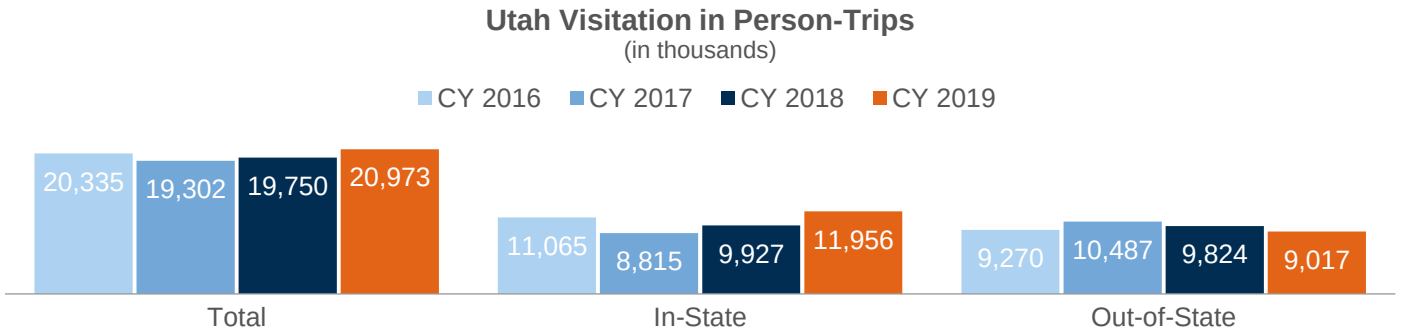
Utah’s visitor volume benefits from increased in-State travel

- Utah’s visitor volume reached a record high of 20.97 million visitors in CY 2019, an increase of 6.2% from the previous year. During the same period, domestic travel within the U.S. experienced a decline.

- Utah residents traveling in-state were responsible for the growth in CY 2019 visitor volume, with in-state travel rising by over 2 million visitors. This increase helped offset a slight decrease among out-of-state visitors.

- Utah’s leisure visitor volume experienced an increase of 15.0% in CY 2019, with roughly 2.2 million more leisure travelers than the previous year. At the same time, Utah’s business visitors rose by 513.000.

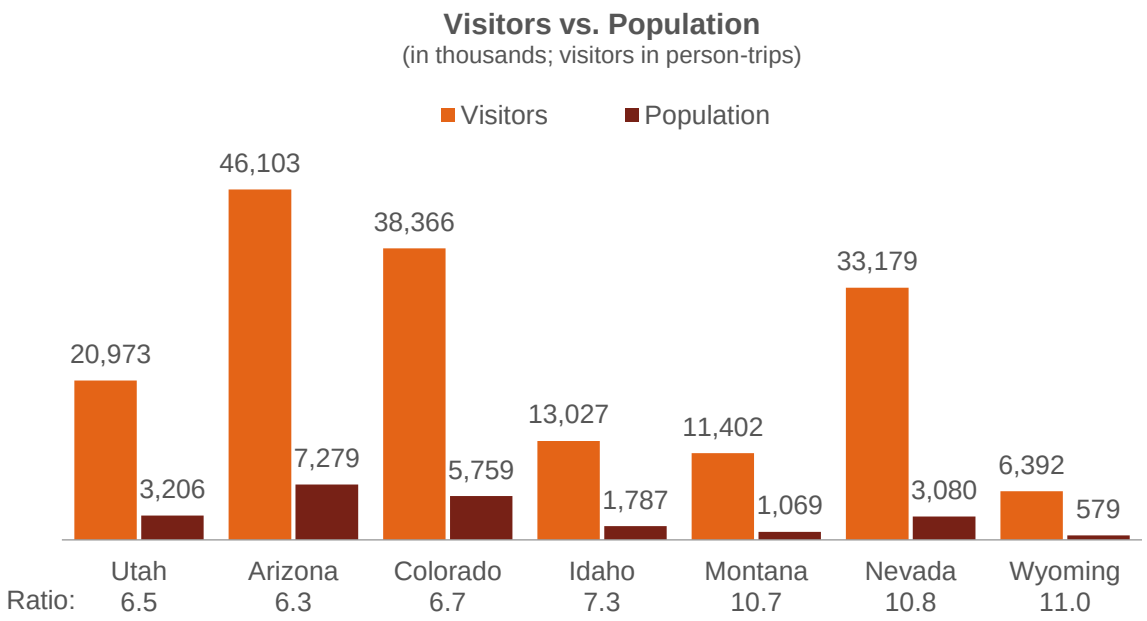


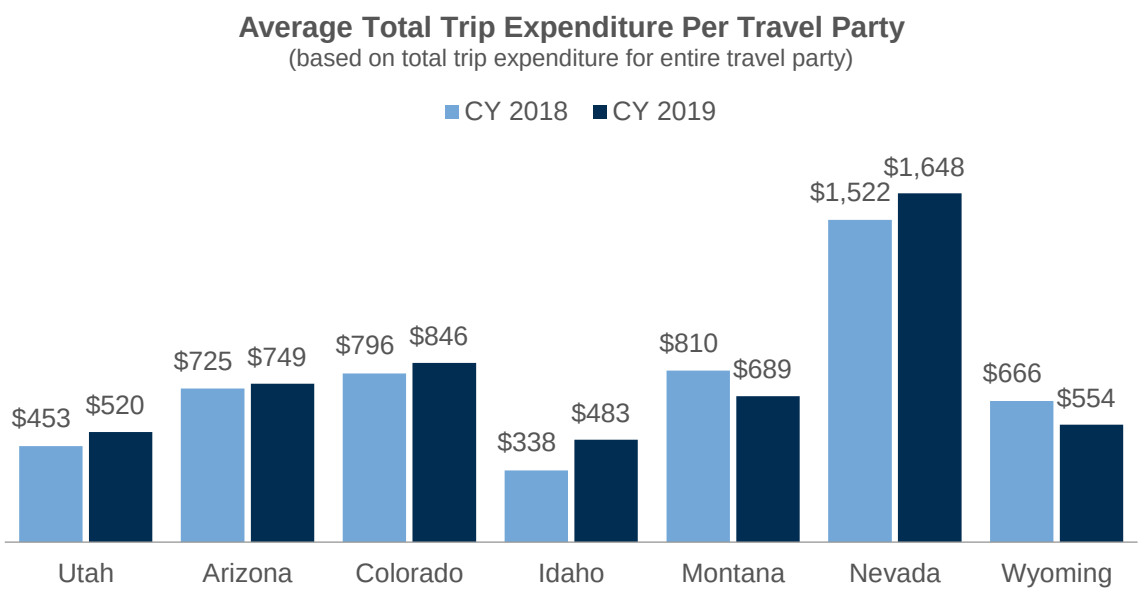


	Total				In-State				Out-of-State			
Leisure:	16,672	16,732	14,894	17,127	9,085	7,776	7,645	9,236	7,351	8,955	7,249	7,891
Business:	1,142	1,177	1,045	1,558	524	396	263	1,112	954	780	782	446
Other:	2,949	1,393	3,811	2,288	2,058	683	2,019	1,608	965	752	1,793	680

Tourism generates revenue for Utah

- States benefit financially from tourism. Tourism generates revenue, not only for industry businesses directly, but also in taxes (sales/lodging/etc.) that contribute to state coffers.
- The ratio of a states visitors per its population helps show the relevance of tourism. With 6.5 visitors per resident, Utah ranks 6th among the competitive states in its region.
- Spending among Utah visitors reached an average of $520 per travel party/trip in CY 2019, an increase of 14.6% from the previous year.
- Within the competitive region, average trip spending only decreased among travel parties visiting Montana and Wyoming.

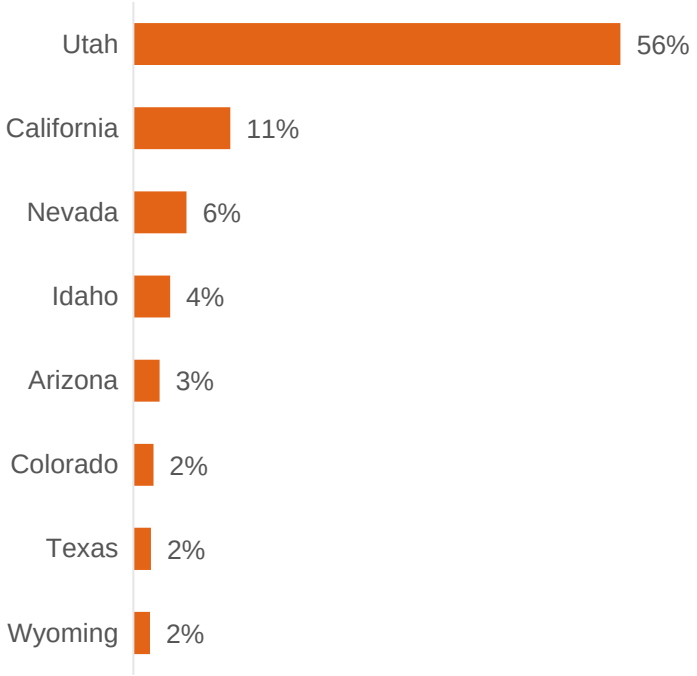




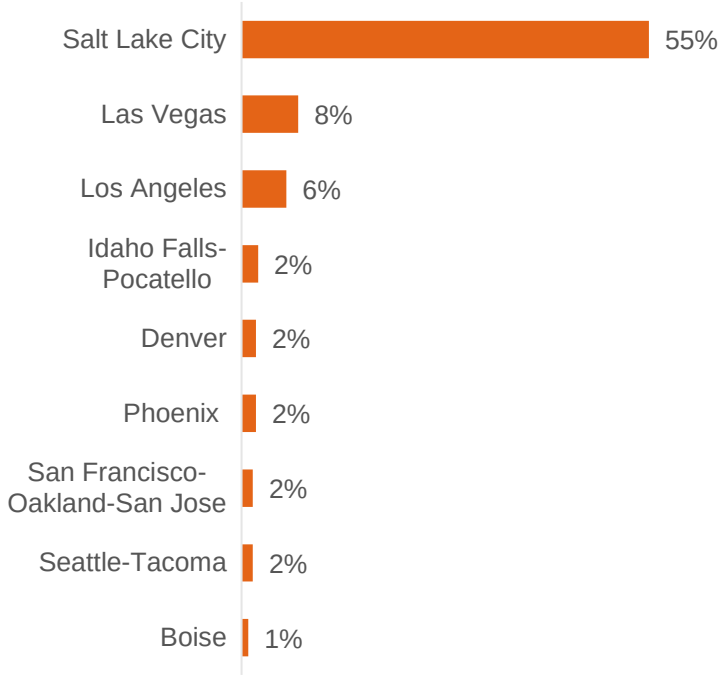
Proximity influences travel—where visitors come from and where they go

- Utah primarily draws travelers from within its own borders, with Utah residents accounting for more than half (56%) of the state's visits in CY 2019. Nearby states and their respective cities continue to dominate out-of-state source markets.
- Travelers continue to flock to Utah's largest cities, regardless of where they live. However, out-of-state visitors are more likely to include Salt Lake City, St. George, Cedar City, Moab, and Bryce Canyon in their trip itinerary than in-state visitors.

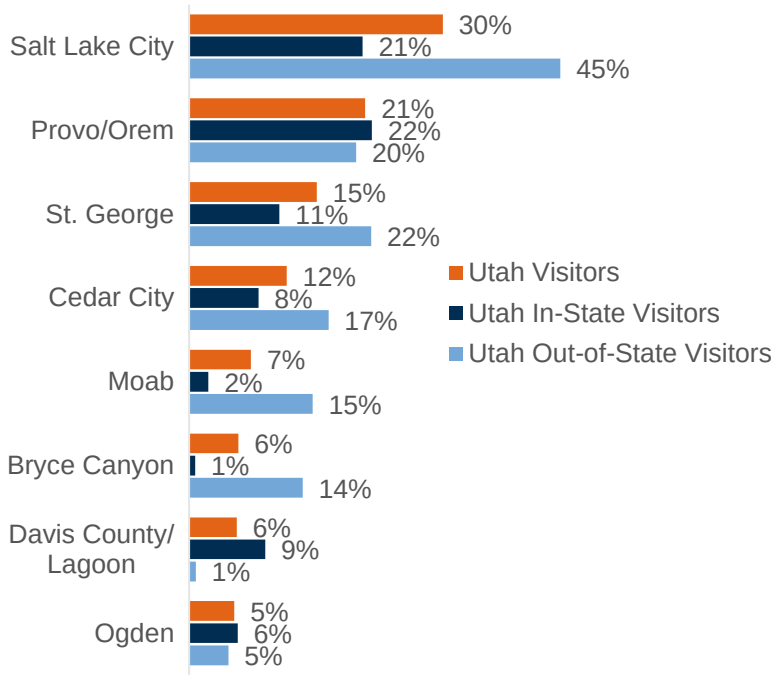
Top Origin States for Utah Visitors
(in trips)



Top Origin DMAs for Utah Visitors
(in trips)



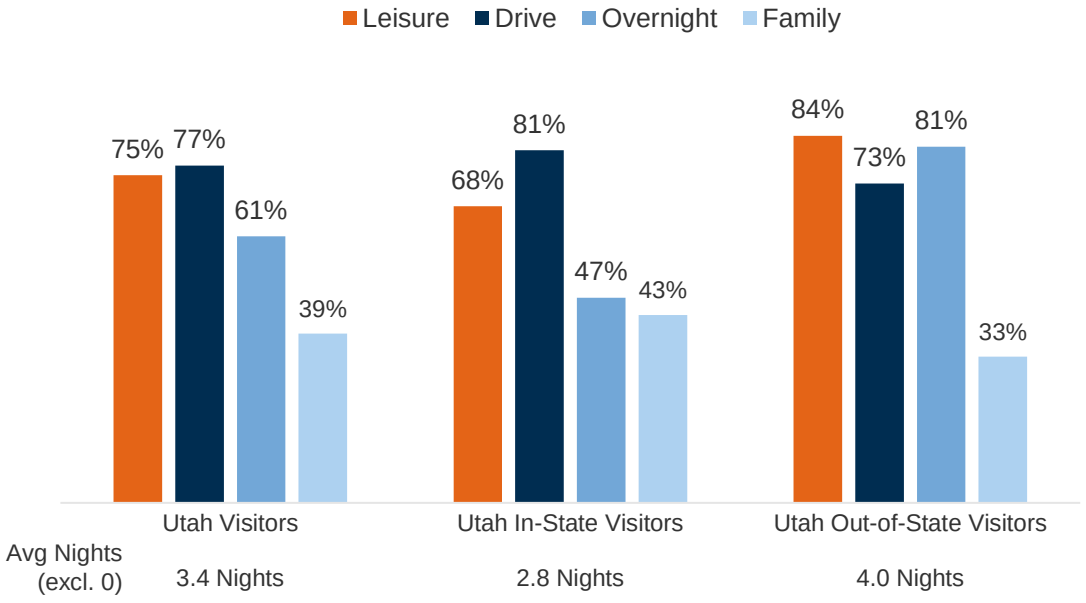
Top Utah Destinations
(in trips)



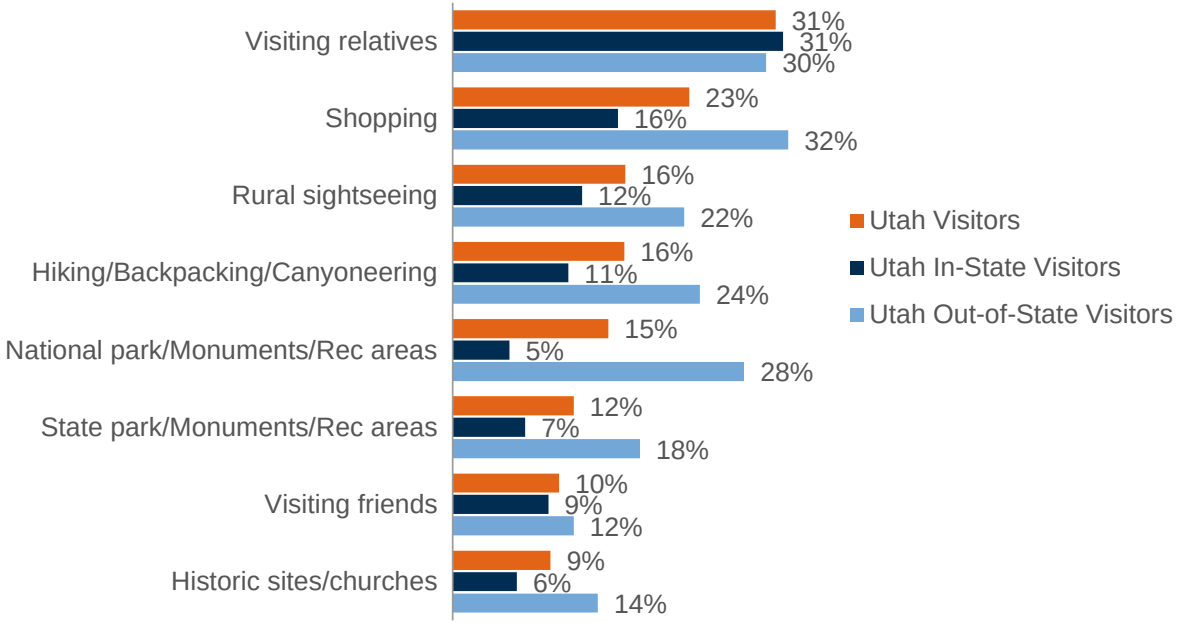
Most visit Utah for leisure, drive, and stay overnight—many taking advantage of Utah's abundant outdoor features

- Leisure dominates Utah's tourism industry, representing 75% of visits to the state. Out-of-state visitors are more likely to stay overnight than in-state visitors (81% vs 47%) and stay more nights, while in-state visitors are more likely to travel with their children (43%).
- Although visiting friends is the top activity of Utah visitors, outdoor activities—such as rural sightseeing, hiking/backpacking, and both state and national parks—continue to be important among Utah's out-of-state visitors.

Utah Visitors Trip Purpose, Mode, Overnights, and Families



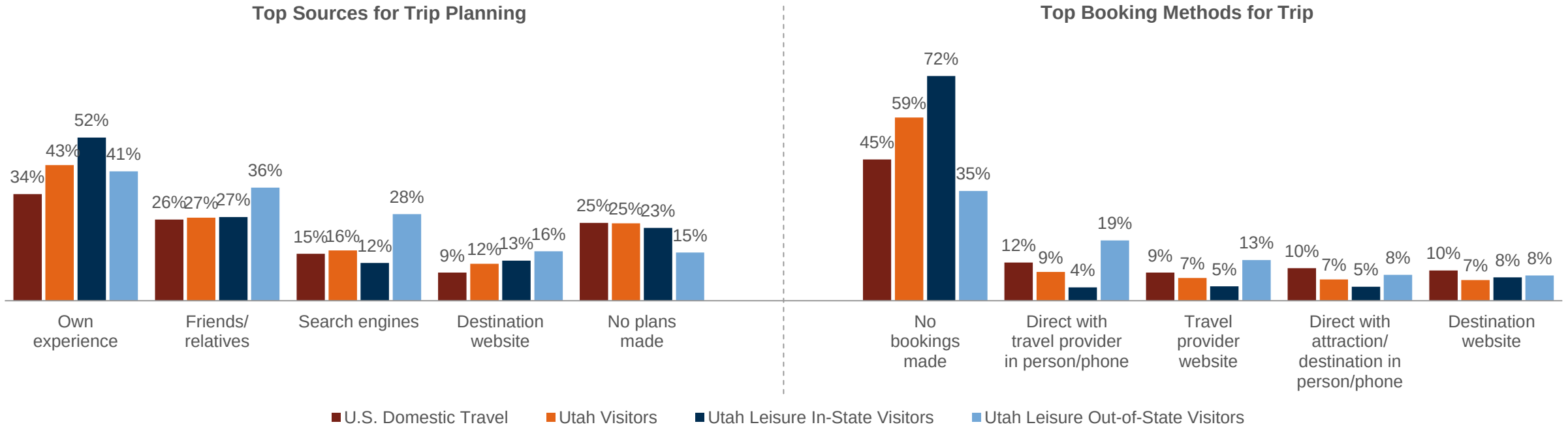
Top Activities of Utah Visitors



Note: drive figures reflect own vehicle or rental; top activities reflect any participation and assumptions differ from slide 13 indicating niche activities as a reason for travel

Utah visitors rely on experience and advice from people they know when planning travel

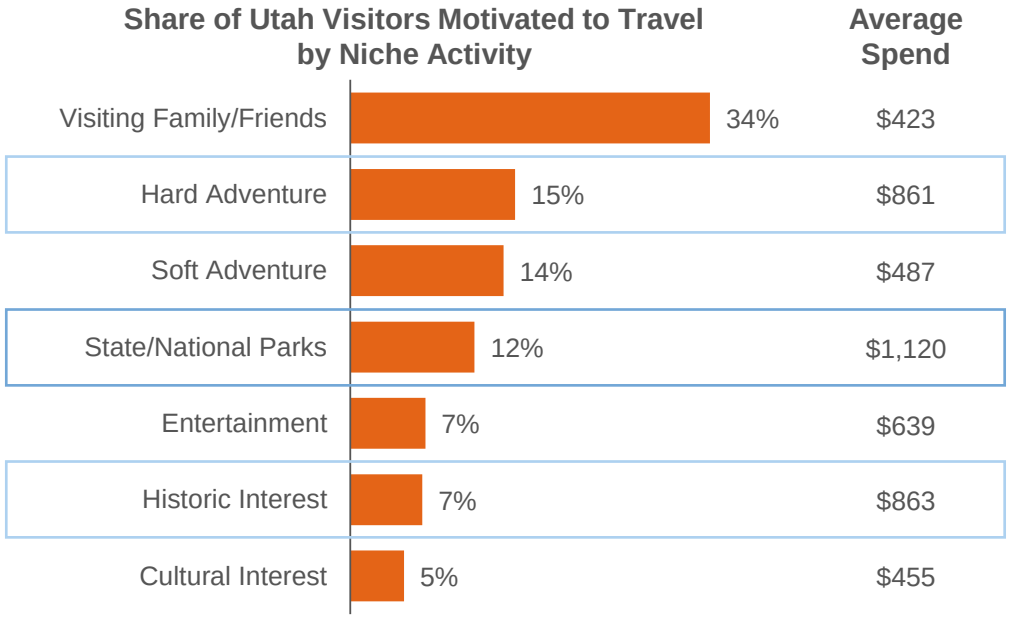
- Utah visitors rely more on their own experience than overall U.S. domestic travelers (43% vs. 34%), particularly in-state visitors (52%). Among out-of-state visitors, advice from friends/relatives (36%) and search engines (28%) also plays an important role.
- Most of Utah's visitors made no bookings for their trip (59%), but those that did mostly booked direct with the travel provider in person or by phone (9%), via a travel provider website (7%), directly with the destination/attraction (7%), or using a destination website (7%).

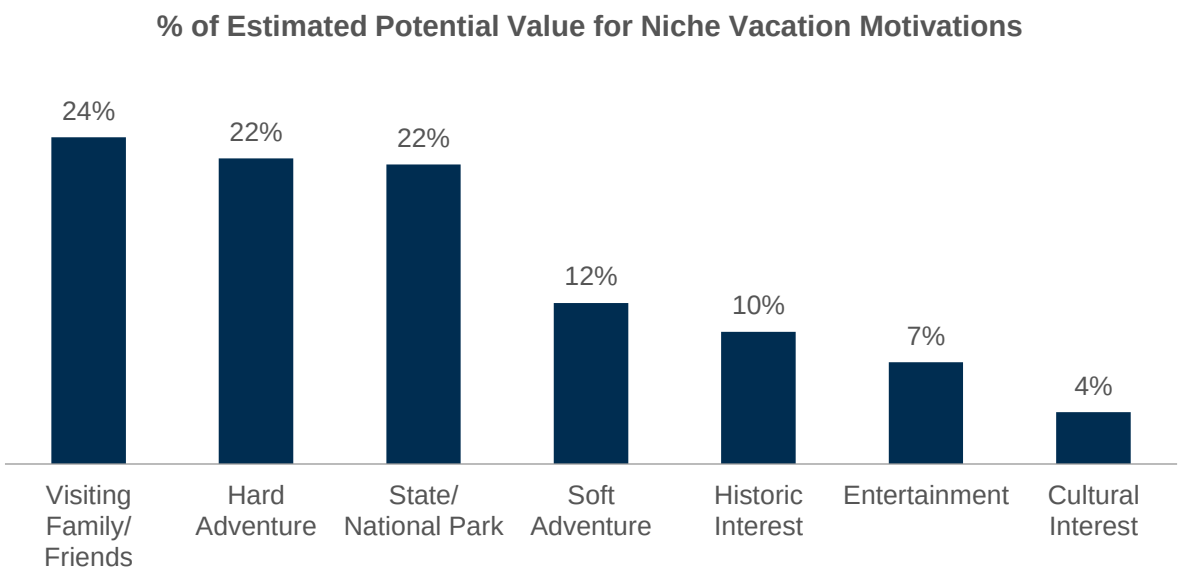


Niche activities motivate travel and generate spend

- Niche activities can motivate travel to Utah and generate spend, particularly those that capitalize on Utah's unique outdoor features—such as, the Hard Adventure niche and State/National Parks niche. Utah's visitors motivated by these niches represent a sizable portion of Utah's visitors and land in the top three for highest average spend per trip.

- Combining trip volume with spending provides a guide to help determine the most lucrative niche segment. This model indicates that outside of friend/family travelers, both the Hard Adventure niche and State/National Parks niche are the most lucrative visitor segments for Utah, followed by the Soft Adventure and Historic Interest niches.





Omnitrak

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

Niche activities can drive travel to Utah and visitor characteristics of niche travelers varies

Hard Adventure

- 20% of Utah leisure visitors
- Younger - average age 42
- Spend per party/trip: $861
- 39% live in Utah, 25% border state
- 82% overnight stays averaging 3.7 nights
- 41% have children in household

Soft Adventure

- 20% of Utah leisure visitors
- Older - average age 47
- Spend per party/trip: $487
- 47% live in Utah, 27% border state
- 79% overnight stays averaging 3.3 nights
- Half have children in household (54%)

State/National Park(s)

- 13% of Utah leisure visitors
- Oldest - average age 48
- Spend per party/trip: $1,120 (highest)
- Fewest from Utah (18%)
- 88% overnight - average 4.1 nights (most)
- Fewest with children in household (33%)

Historic Interest

- 8% of Utah leisure visitors
- Average age: 45
- Spend per party/trip: $863
- Half from Utah (53%), 10% border state
- 84% overnight stays - average 3.4 nights
- 46% have children in household

Cultural Interest

- 5% of Utah leisure visitors
- Younger - average age 41
- Spend per party/trip: $455 (lowest)
- Most from Utah (71%), 8% border state
- 71% overnight stays - average 3.6 nights
- Nearly half have children at home (48%)

Entertainment

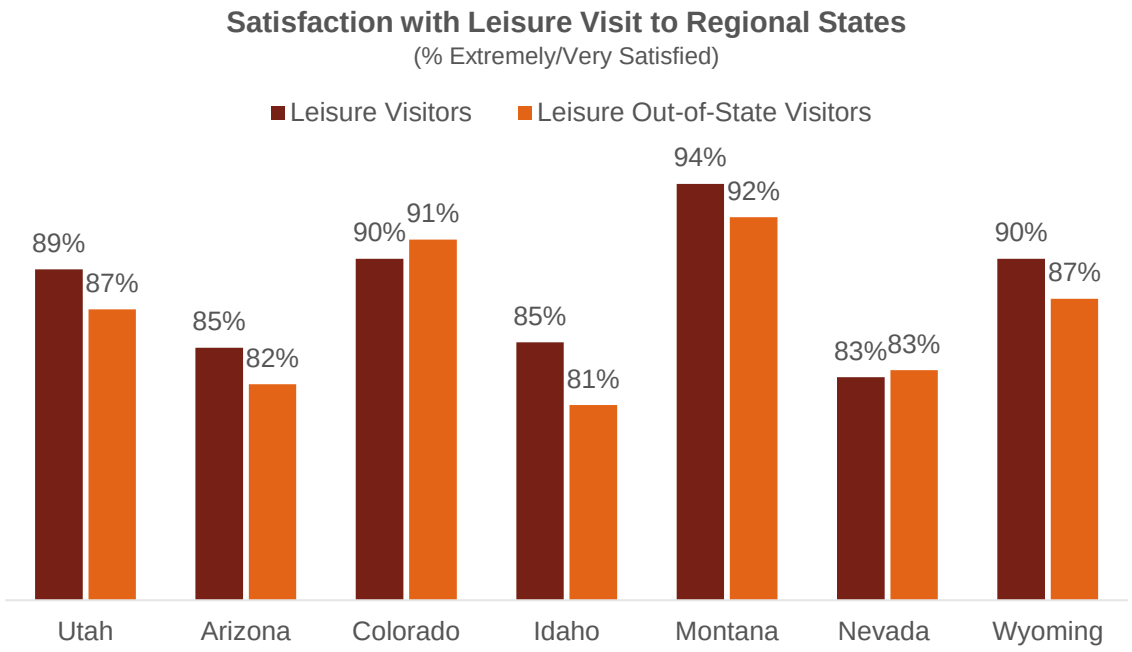
- 8% of Utah leisure visitors
- Youngest - average age 35
- Spend per party/trip: $639
- 57% from Utah, 22% border state
- 71% overnight stays - average 3.8 nights
- Most have children in household (63%)

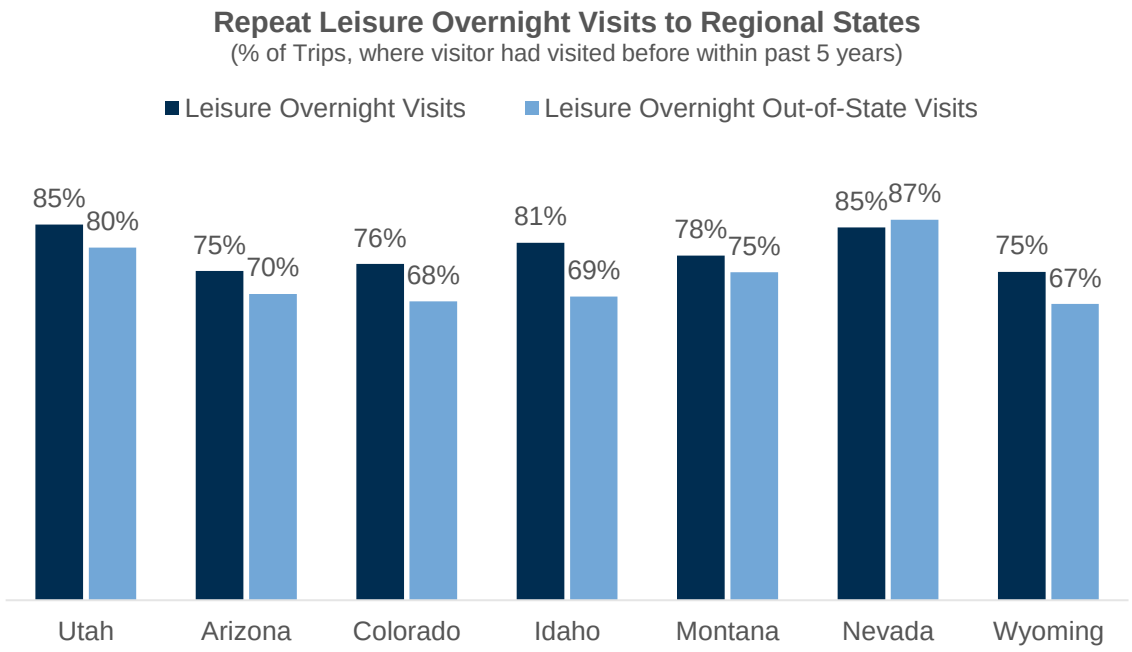
Note: niche activity figures reflect Utah visitors who said an activity within a niche category was a primary/secondary reason for their visit (see glossary for niche definitions); since it is possible an activity as a primary reason and secondary reason for visiting to fall within different niches,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

Utah sends leisure visitors home happy, which can help encourage visitors desire to return

- Nearly nine in ten (89%) Utah leisure visitors report being satisfied with their experience, while 87% of out-of-state leisure visitors report the same. This puts Utah roughly in the middle of its competitive set, in terms of satisfaction.

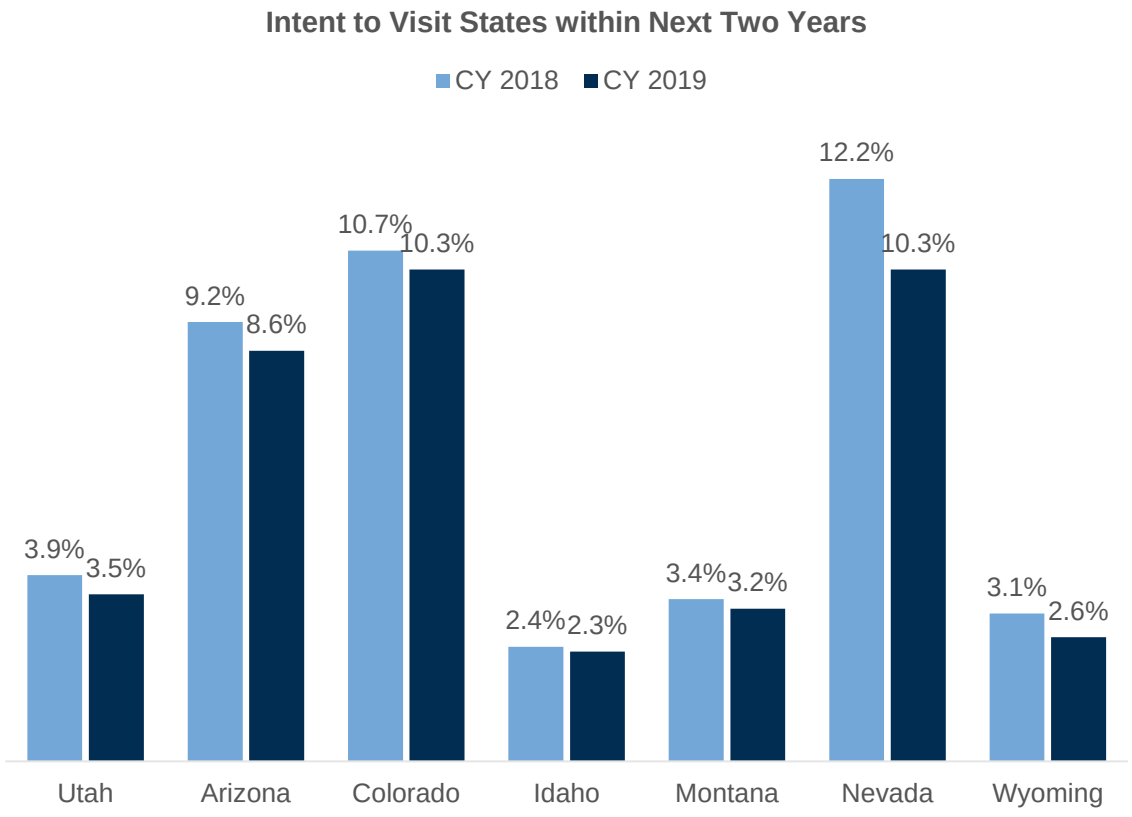
- Utah ranks at the top with Nevada among leisure overnight visitors for the portion of repeat visits to a given state and it ranks second among leisure overnight out-of-state visitors—a positive indication of Utah's ability to retain leisure travelers to the state.

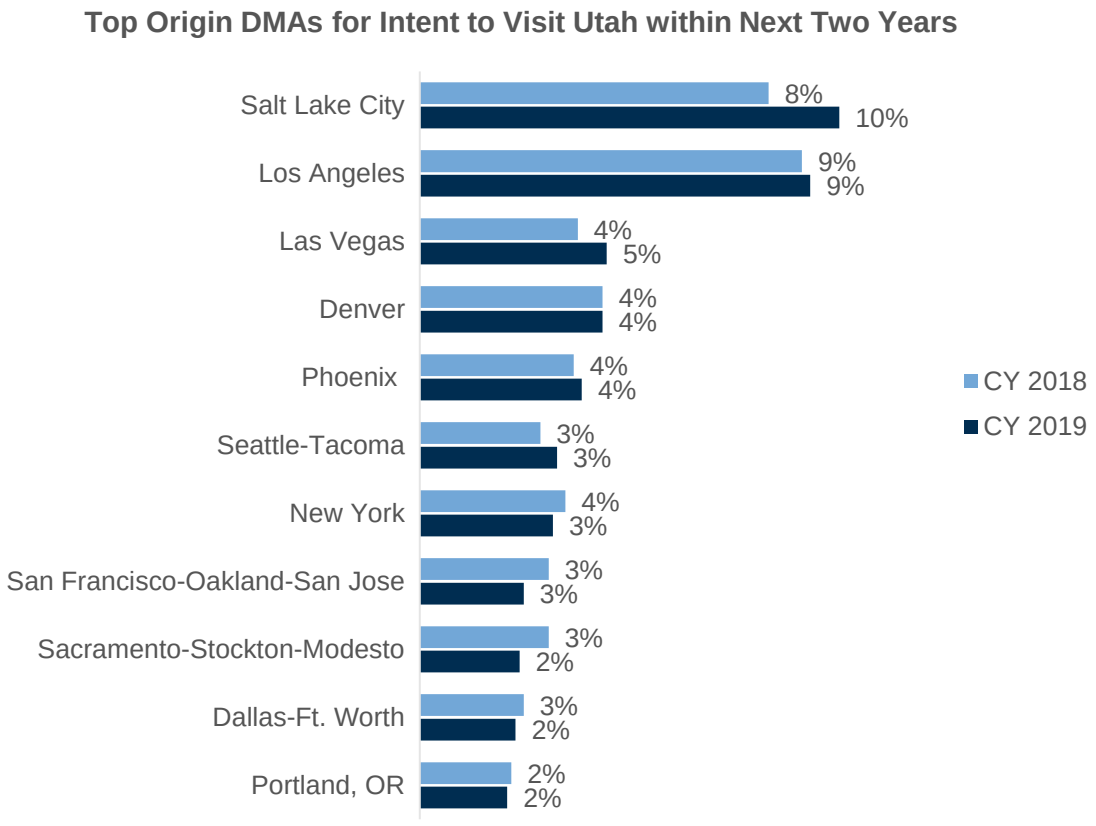




Visit intent dips for Utah and nearby competitors

- The top DMA market for intent to visit Utah continues to be inside state lines, with 10% of Salt Lake City travelers reporting they intend to travel in their home state. Travelers in Los Angeles reported the second highest intent at 9%, followed by travelers living in Las Vegas at 5%.





Utah’s Competitive Position and Assessment

Western travelers tend to stay in the West:

- Proximity plays a substantial role. Of competing leisure destinations chosen by Utah leisure visitors, the top six states were in the West. During the past three years, Utah’s visitors most often chose adjoining and nearby states as their leisure destination, specifically: California (51%), Nevada (42%), Arizona (38%), Colorado (37%), Idaho (36%), and Wyoming (31%). For future Utah leisure trips, markets within its own borders and nearby Western states top the list, including Salt Lake City, Los Angeles, Las Vegas, Denver, Phoenix, and Seattle.

Assessment:

- In 2019, Utah continued to receive most of its visitors from within its own borders, adjoining states, and other nearby Western states, while still falling short on drawing in travelers from farther away—such as large Eastern markets. Nearly three–fourths (73%) of Utah’s visitors live within the state or in a border state (56% and 17%, respectively).
- Utah’s visitors have easy access (77% drive), can decide on a trip quickly, and can visit frequently. In fact, 84% of Utah’s total leisure visitors in 2019 report having visited the state before within the past 5 years. Familiarity with the state is even found among out-of-state travelers, with around three quarters (77%) of Utah’s out-of-state leisure travelers being repeat visitors. The relative proximity that visitors to Utah travel from allows for flexibility in marketing efforts and development of quick promotions to entice travel to the state.
- Niche activities motivate vacation travel and generate revenue. Niche segments provide a guide for growth opportunities and realities. Adding visitors from the most lucrative niches, Hard Adventure and State/National Parks, can provide a boost to Utah’s average leisure trip spend and even more so if Utah is able to draw in niche travelers from top markets that are farther away, including New York City, Chicago, and Dallas-Fort Worth. Utah can also benefit from targeting top markets for Soft Adventure niche travelers—such as New York City, Los Angeles, Chicago, and Atlanta—the third most lucrative niche segment in terms of potential value.
- Utah experienced a boost in visitor volume in 2019; however, the percentage of U.S. travelers intending to take a leisure trip to Utah within the next five years fell from a high of 3.9% in 2018 to 3.5% in 2019—a five-year low. Although fluctuations in intent may not directly translate into visitor volume shifts, decreased intent could be a warning for what may come.

DETAILED RESULTS

Share of Visitors

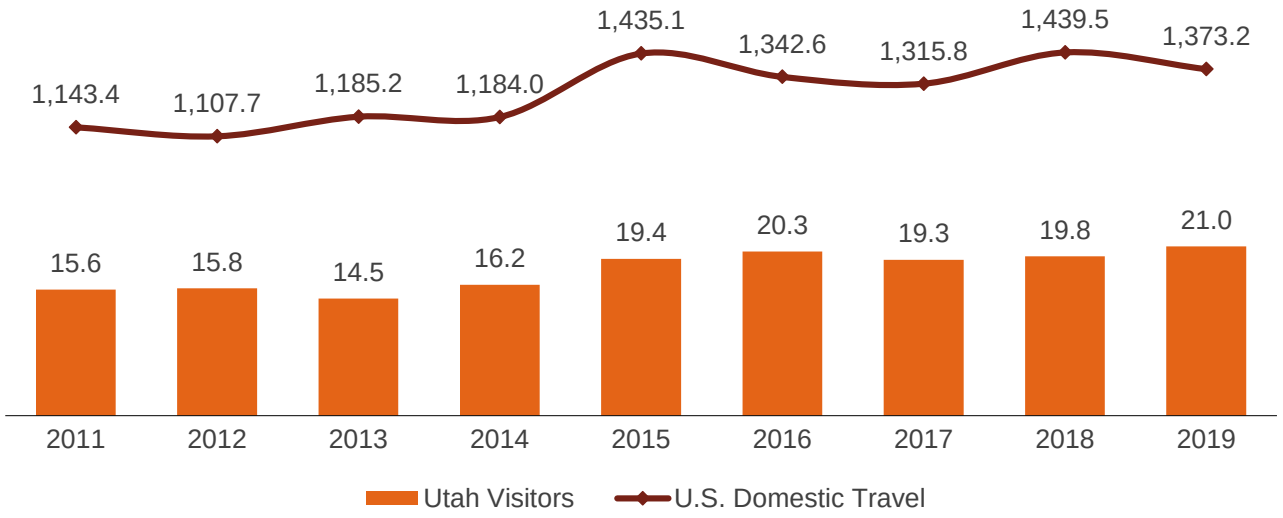
Utah welcomed 21.0 million visitors in CY 2019, a year-over-year increase of 6.2%

Market Overview:

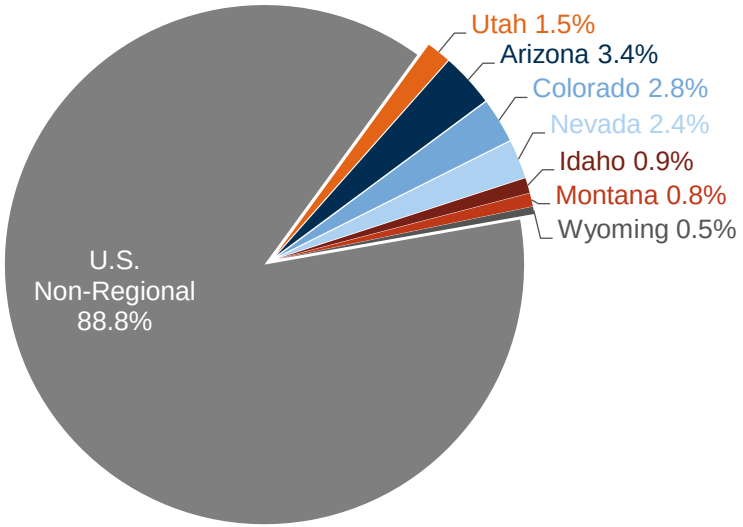
- Utah visitation reached 21.0 million in CY 2019, an increase of 6.2% from the previous calendar year. During the same period, domestic travel within the U.S. experienced a decrease.
- Travel to Utah accounted for 1.5% of total U.S. domestic travel in CY 2019.
- In FY 2019, the ratio of Utah visitors to the state population was 6.5.

Utah Population Census Estimate	Utah Households Census Estimate	Utah Visitors CY 2019
3,205,958	957,619	21.0 million

Domestic Travel Trends within the U.S. and Utah
(person-trips, in thousands)

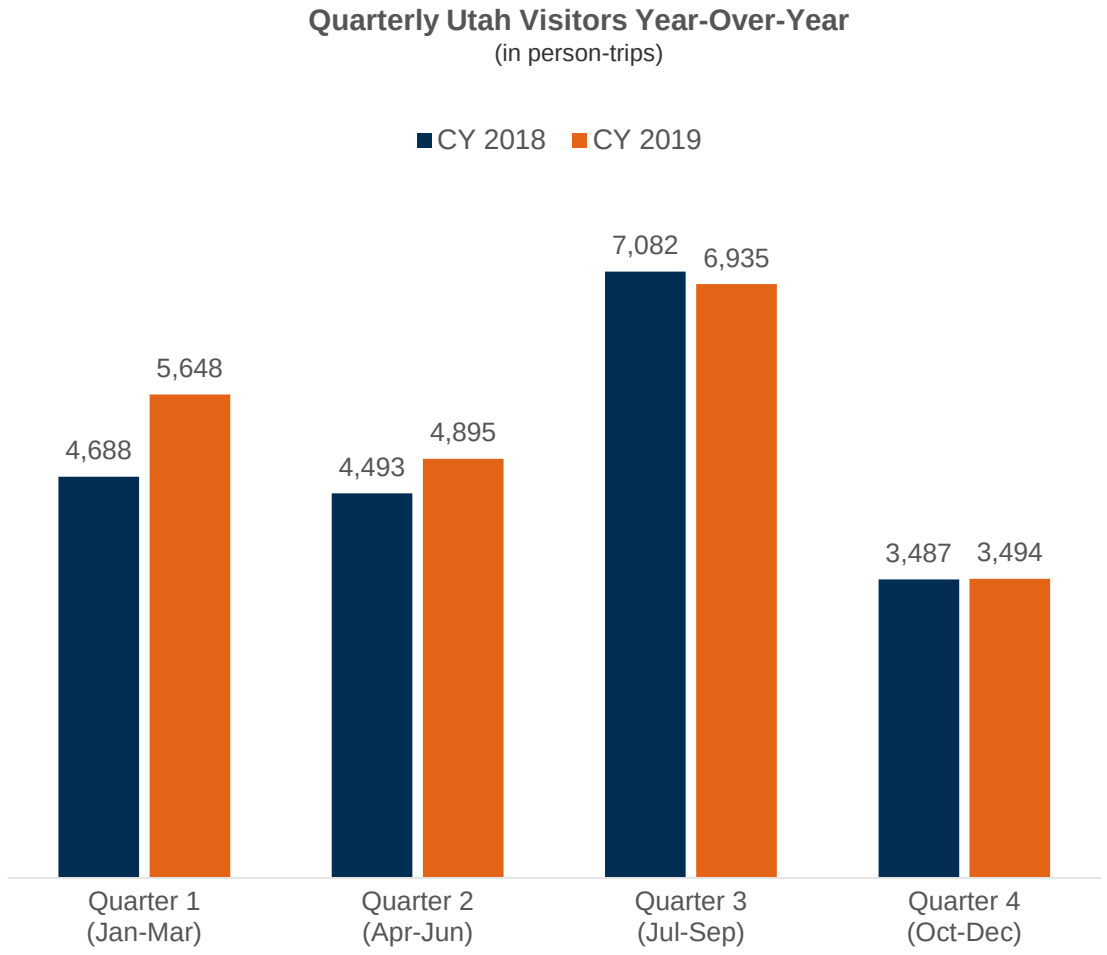


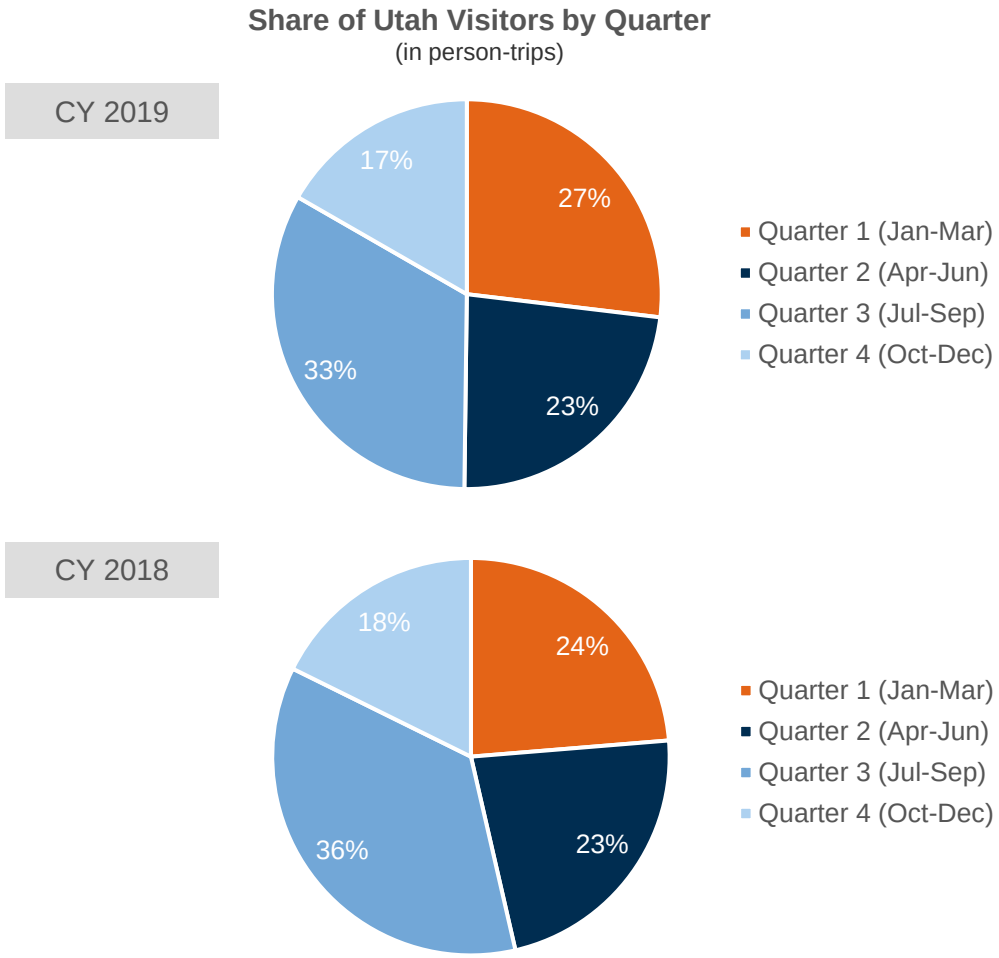
Market Share of U.S. Domestic Travel: Utah & Competitors



Sources: TravelTrak America - Q4a. U.S. state(s) visited (in person-trips)

First quarter visitation experienced the largest gain, but the third quarter still accounts for the largest portion of visitor volume

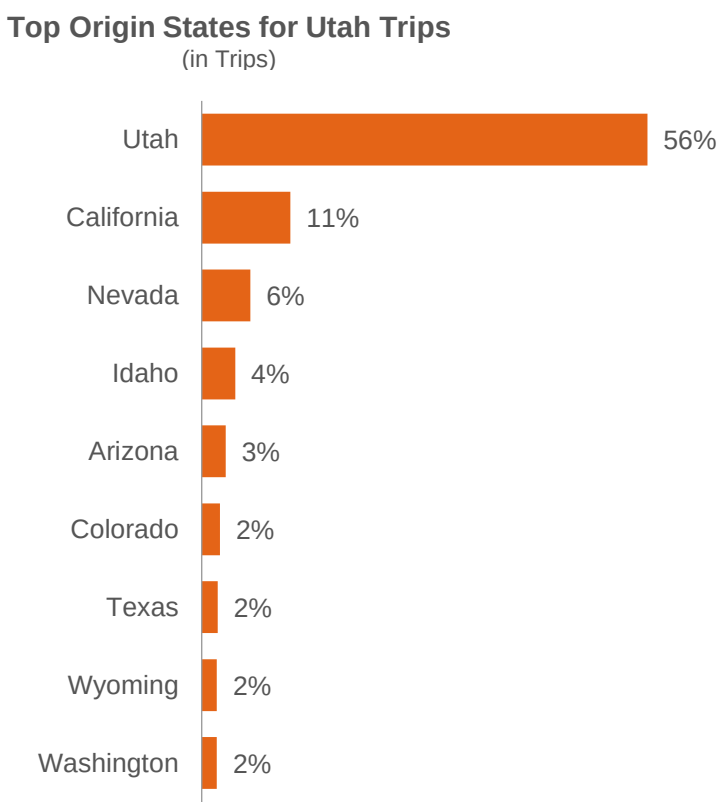


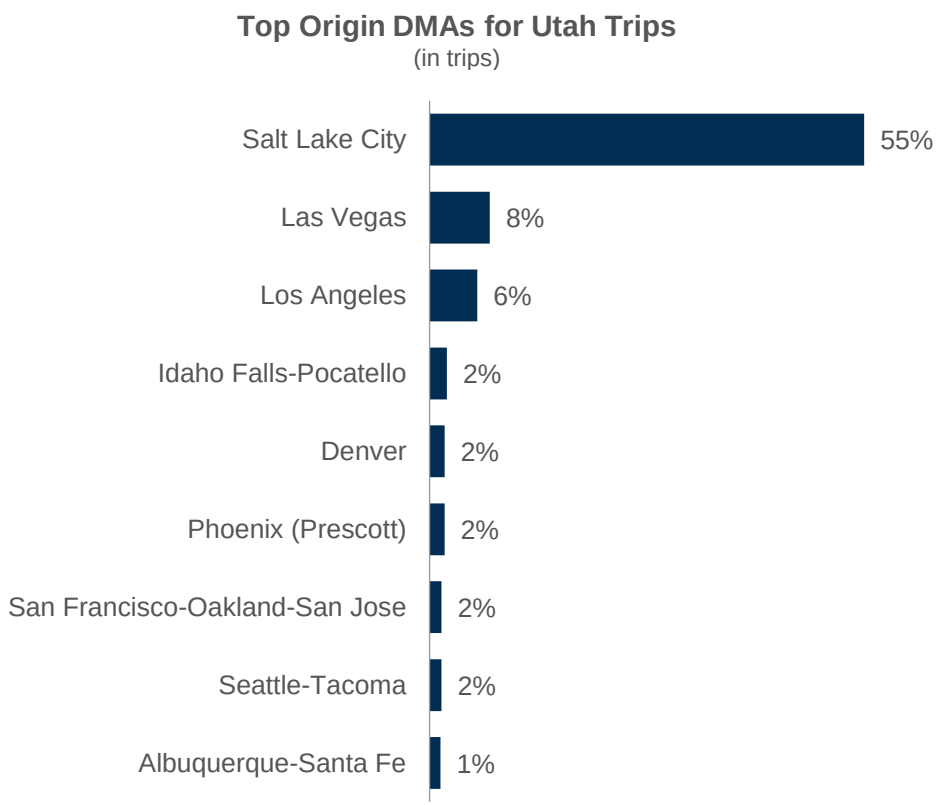


Omnitrak

Source Markets and Trip Types

Proximity influences travel, with nearby and border states as well as their respective cities continuing to dominate out-of-state source markets



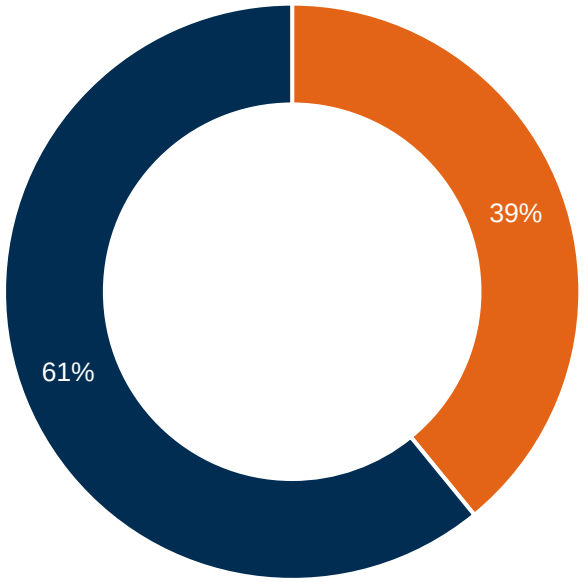


Omnitrak

Note: DMA figures reflect combined 2018-2019 data to increase sample & stabilize potential fluctuations caused by special circumstances (i.e. wildfires, hurricanes, etc.) and not actual changes in travel behavior.

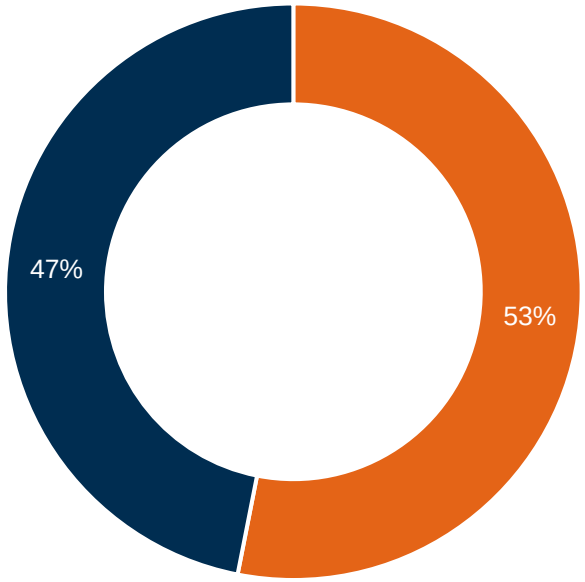
Overnight trips remain most common, especially among Utah's out-of-state visitors

Utah Trips by Type
(in trips)



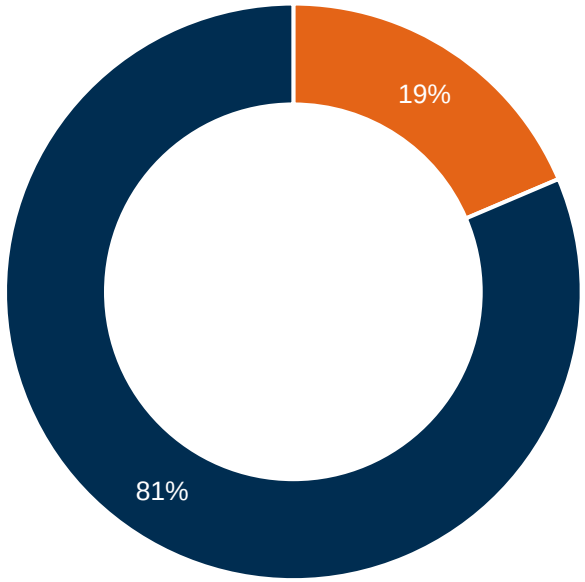
Day Trips Overnight Trips

Utah In-State Trips by Type
(in trips)



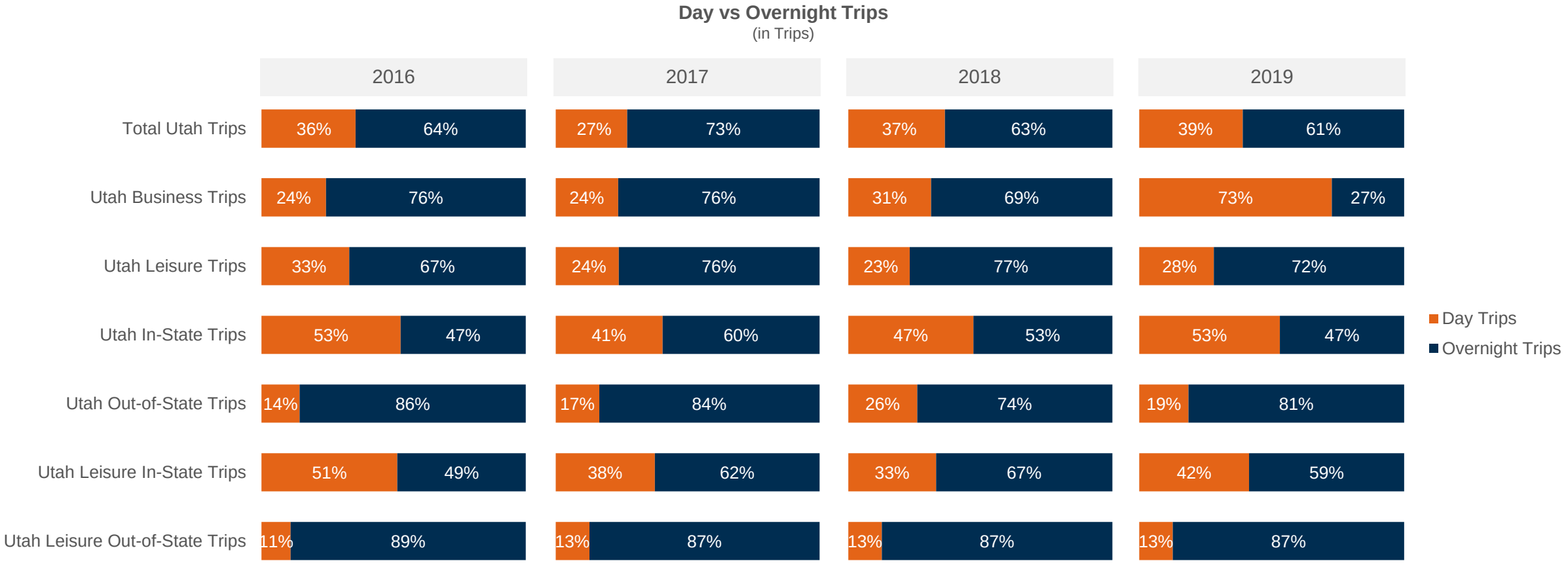
Day Trips Overnight Trips

Utah Out-of-State Trips by Type
(in trips)



Day Trips Overnight Trips

Most leisure trips to Utah are overnight (72%), with 87% of out-of-state leisure trips and 59% of in-state being overnight

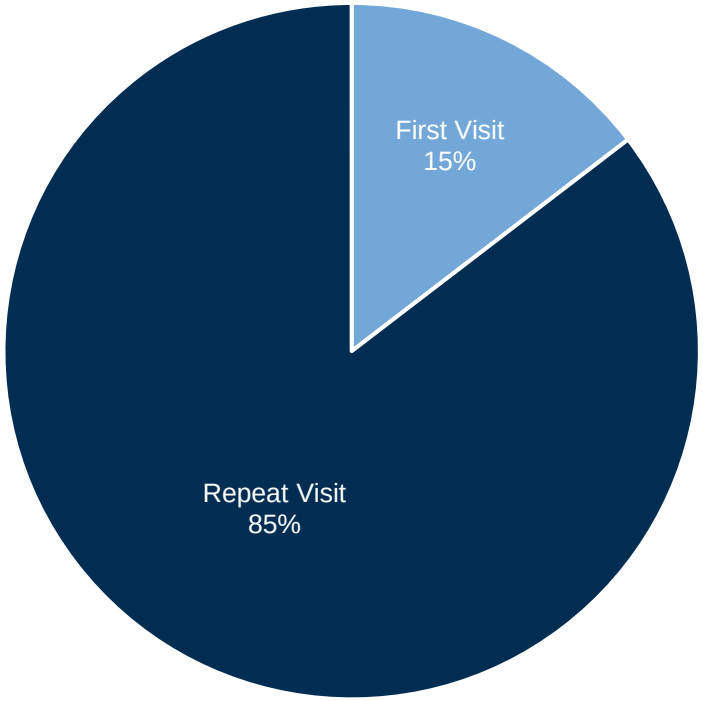


(Note: personal business and other are not classified as either business or leisure trips).

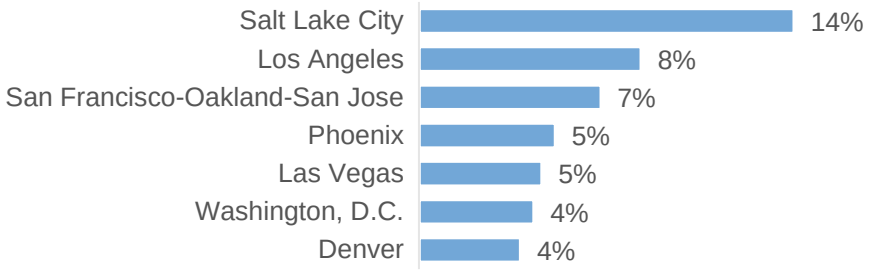
Repeat visits account for 85% of Utah's overnight leisure trips, with majority originating in Salt Lake City and cities of neighboring states

- Top origin markets for First Visits also consist of cities closer in proximity, except for Washington, D.C.

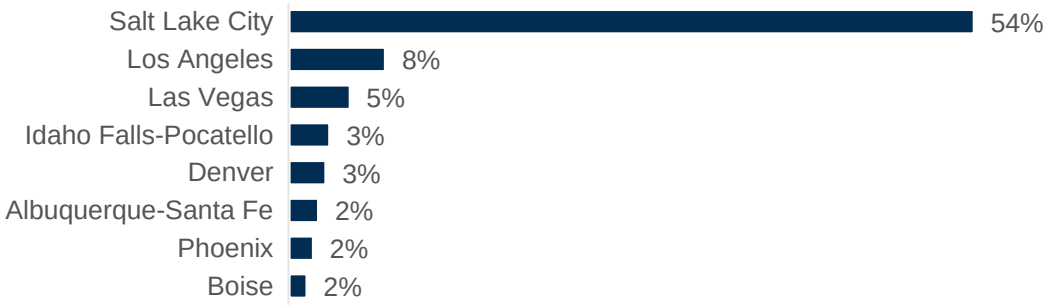
First vs. Repeat Utah Leisure Overnight Visits
(% of Trips)



Top Origin DMAs for First Utah Leisure Overnight Visits
(% of Trips)



Top Origin DMAs for Repeat Utah Leisure Overnight Visits
(% of Trips)



Note: Only respondents who indicated they stayed overnight in a state are asked whether they have visited the state before within the past five years and if so, how many times in the past five years..

Planning and Booking

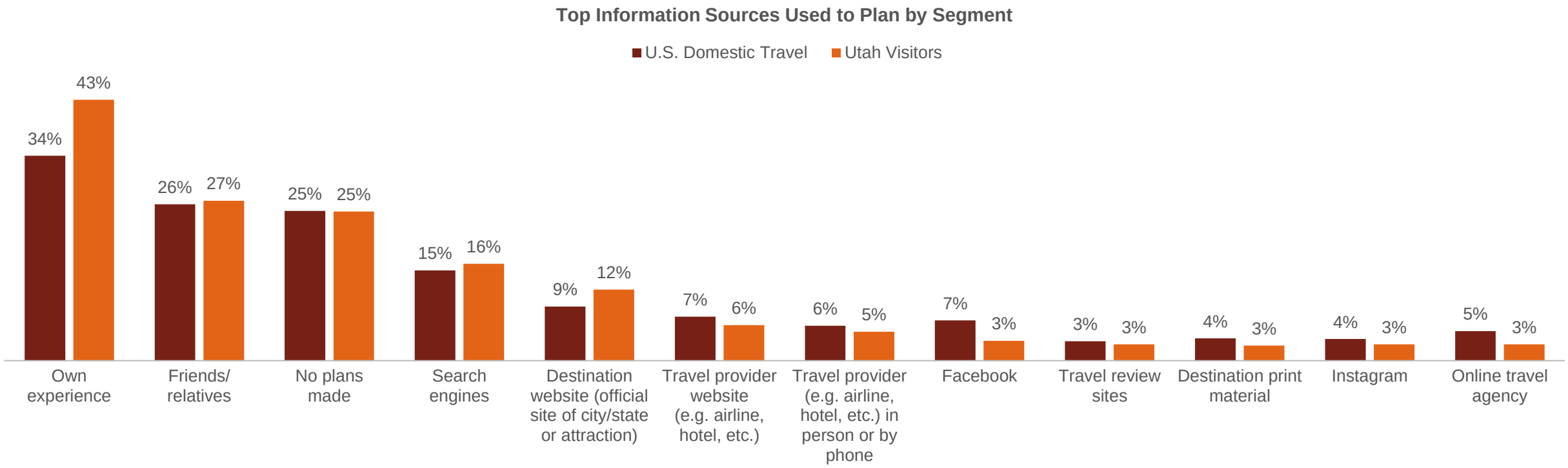
Distance also impacts timing

- Roughly half of Utah's in-state visitors considered (48%) and decided (53%) on their trip less than 2 weeks before their trip, while majority of Utah's out-of-state visitors began planning their trip farther out—with 59% considering and 55% deciding on travel plans a month or more out.

	U.S. Domestic Travel		Utah Visitors		Utah In-State Visitors		Utah Out-of-State Visitors		Utah Leisure Overnight Visitors		Utah Leisure Day Visitors	
Trip Decision Timing	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019
Considered												
Less than 2 weeks before visit	31%	33%	35%	39%	43%	48%	28%	26%	25%	29%	50%	53%
2 – 4 weeks before visit	16%	18%	17%	16%	21%	17%	14%	15%	16%	20%	16%	17%
1 – 3 months before visit	20%	20%	17%	21%	14%	22%	19%	20%	19%	20%	10%	16%
3 – 6 months before visit	14%	13%	12%	11%	9%	4%	16%	19%	16%	13%	6%	8%
6+ months before visit	18%	13%	18%	14%	13%	9%	23%	20%	25%	19%	18%	6%
Decided												
Less than 2 weeks before visit	38%	35%	42%	42%	51%	53%	33%	28%	33%	34%	59%	58%
2 – 4 weeks before visit	18%	19%	17%	16%	19%	15%	16%	17%	15%	18%	14%	19%
1 – 3 months before visit	19%	20%	18%	20%	17%	21%	19%	19%	20%	21%	11%	11%
3 – 6 months before visit	13%	13%	11%	11%	6%	4%	15%	20%	14%	13%	7%	7%
6+ months before visit	13%	12%	13%	11%	8%	7%	17%	16%	18%	14%	10%	5%

Most travelers rely on experience to plan travel, but advice from people they know and trust remains important

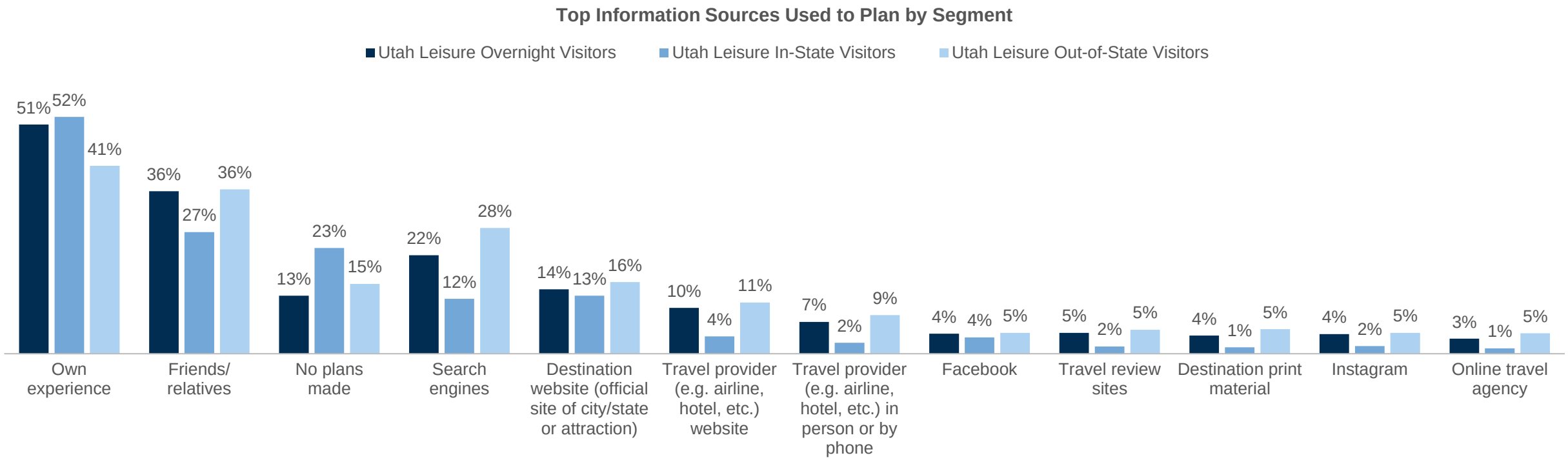
- A greater portion of Utah visitors relied on their own experience than overall U.S. domestic travelers (43% vs. 34%) in 2019, while a similar portion obtained travel advice from friends/relatives (27% vs. 26%).
- Utah visitors are less likely than U.S. domestic travelers to use Facebook, OTAs, destination print material, Instagram, and travel providers during their trip planning.



Note: the Appendix section, contains a table with details on all information sources used by travel segment

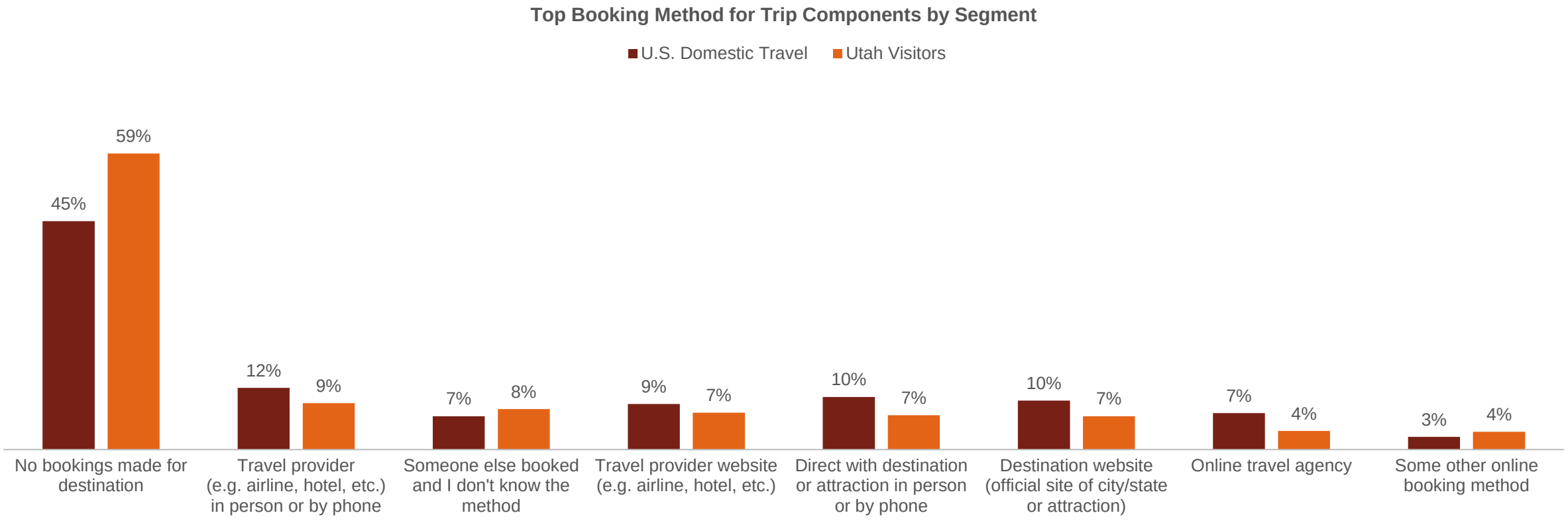
Out-of-state leisure visitors rely on a greater variety of external sources, particularly friends/relatives (36%) and search engines (28%), than in-state leisure travelers

- Around half of Utah's leisure overnight visitors (51%) and leisure in-state visitors (52%) report relying on their own experience for trip planning, compared to 41% of leisure out-of-state visitors.
- Out-of-state visitors were less likely to visit Utah for leisure without travel plans than in-state visitors (15% vs 23%) and were more likely to use each of the available information sources.



Note: the Appendix section, contains a table with details on all information sources used by travel segment

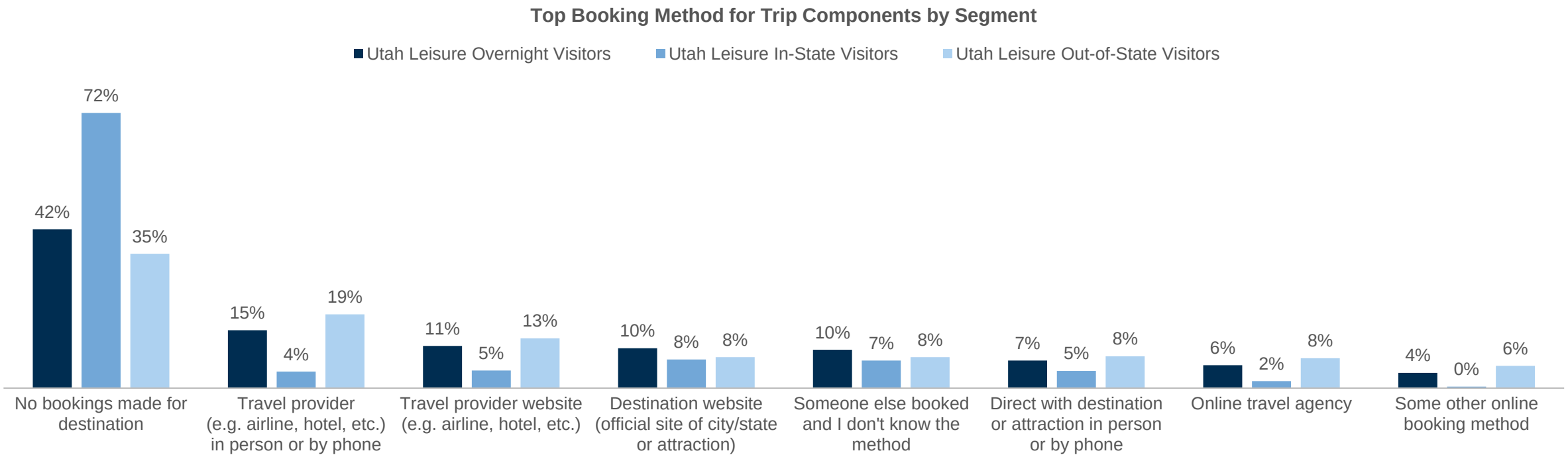
Utah visitors are less likely to book travel components than U.S. domestic travelers, with more than half (59%) of Utah visitors reporting no travel bookings were made



Omnitrak

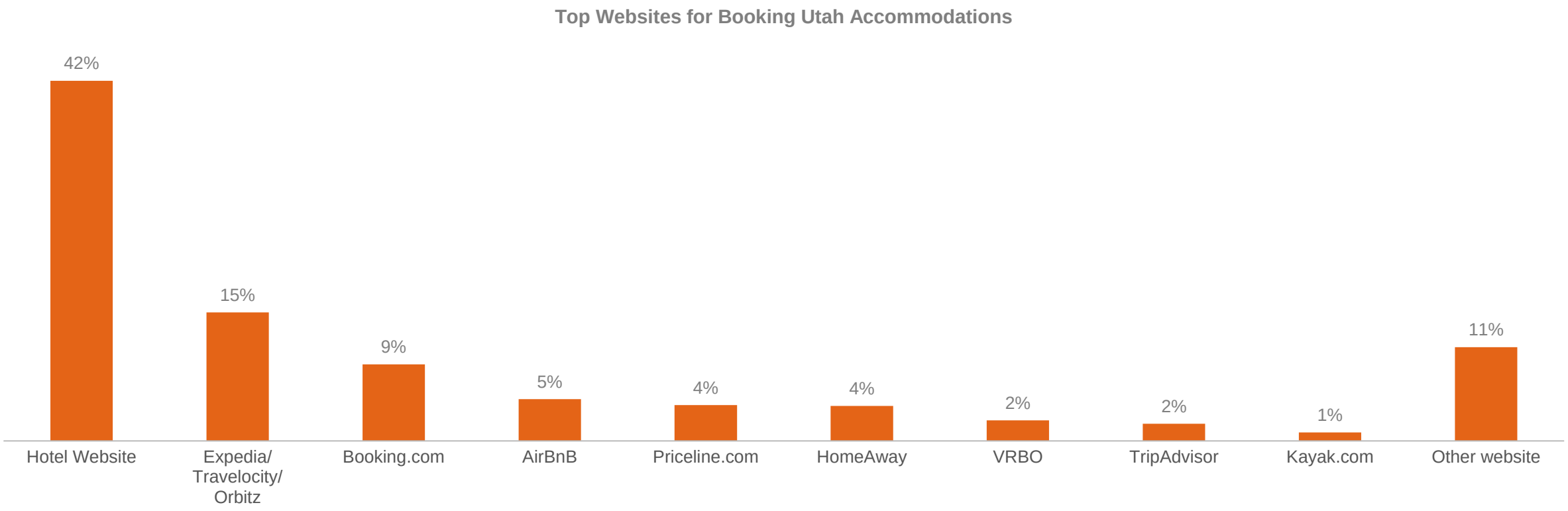
Note: the Appendix section, contains a table with details on all booking methods used by travel segment

Utah’s leisure out-of-state visitors are more likely to book trip components than leisure in-state visitors



Note: the Appendix section, contains a table with details on all booking methods used by travel segment

Utah visitors most often book their accommodations directly through a hotel website



Trip Characteristics

Utah visitors mostly travel for fun and prefer to drive

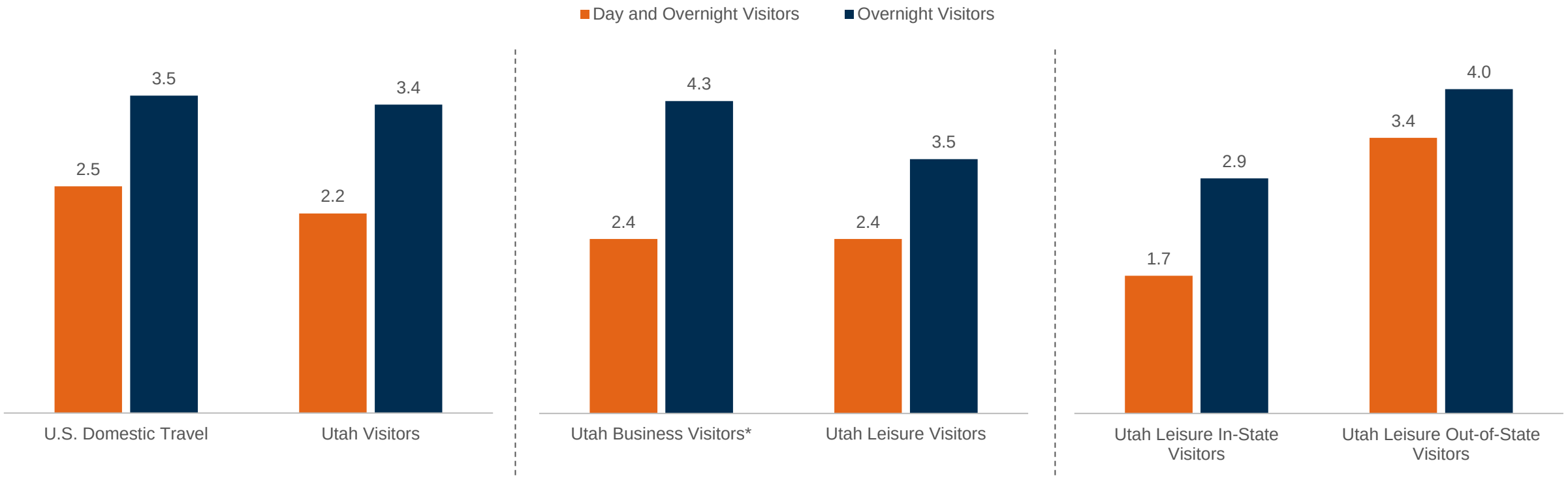
- Trips to Utah where the primary purpose was visiting friends/relatives increased (+8 percentage points), reaching 41% of total Utah trips in 2019, which bringing the state nearly on par with the portion of U.S. domestic trips for the same purpose.
- Utah continues to lead the U.S. for share of outdoor recreation trips (13% vs 9%), although outdoor recreation trips to the state decreased.

	U.S. Domestic Travel		Utah Visitors		Utah Leisure Visitors		Utah Leisure Overnight Visitors		Utah Leisure Day Visitors		Utah Leisure In-State Visitors		Utah Leisure Out-of-State Visitors	
	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019
Primary Trip Purpose (in trips)														
Leisure (net)	79%	79%	72%	75%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Visit Friends/Relatives	41%	44%	33%	41%	47%	55%	48%	58%	47%	53%	53%	57%	41%	53%
Outdoor Recreation	10%	9%	15%	13%	20%	17%	23%	18%	14%	13%	18%	15%	22%	18%
Entertainment/Sightseeing	14%	13%	13%	11%	17%	15%	15%	11%	19%	18%	12%	14%	22%	16%
Other Personal	15%	14%	12%	10%	16%	14%	14%	12%	21%	17%	17%	14%	15%	13%
Personal Business	8%	8%	18%	7%										
Business (net)	10%	10%	7%	14%										
Other	3%	3%	4%	4%										
Primary Transportation Mode (in trips)														
Own Car/Truck	76%	73%	74%	69%	73%	76%	73%	74%	78%	86%	88%	89%	58%	63%
Rental Vehicle	5%	6%	7%	8%	8%	10%	9%	11%	6%	6%	2%	7%	14%	12%
Camper/RV	1%	1%	1%	1%	2%	2%	2%	1%			1%	2%	2%	2%
Airplane	12%	13%	11%	8%	11%	8%	12%	11%	9%	4%	2%	0%	19%	17%
Other	6%	7%	7%	14%	7%	4%	5%	4%	8%	5%	7%	2%	7%	7%

Leisure out-of-state visitors stay longer in Utah on average than in-state visitors

- Although business visitors stay somewhat longer than leisure visitors, they only represent eight percent of Utah's total visitors and with a relatively small sample, averages may significantly fluctuate.

Average Length of Stay by Type of Trip
(in Nights)



Note: U.S. Domestic Travel averages based on stays in each state, not entire length of trip that includes multiple states
*Small sample size

Utah visitors often travel with children and in travel parties with two or more adults, helping boost average travel party size beyond overall U.S. domestic travelers

- Family travel (i.e. travel with children from household) increased during 2019 among Utah's visitors overall, as well as within each of the state's leisure travel segments, helping to drive an increase YOY in average party size across all Utah leisure travel segments

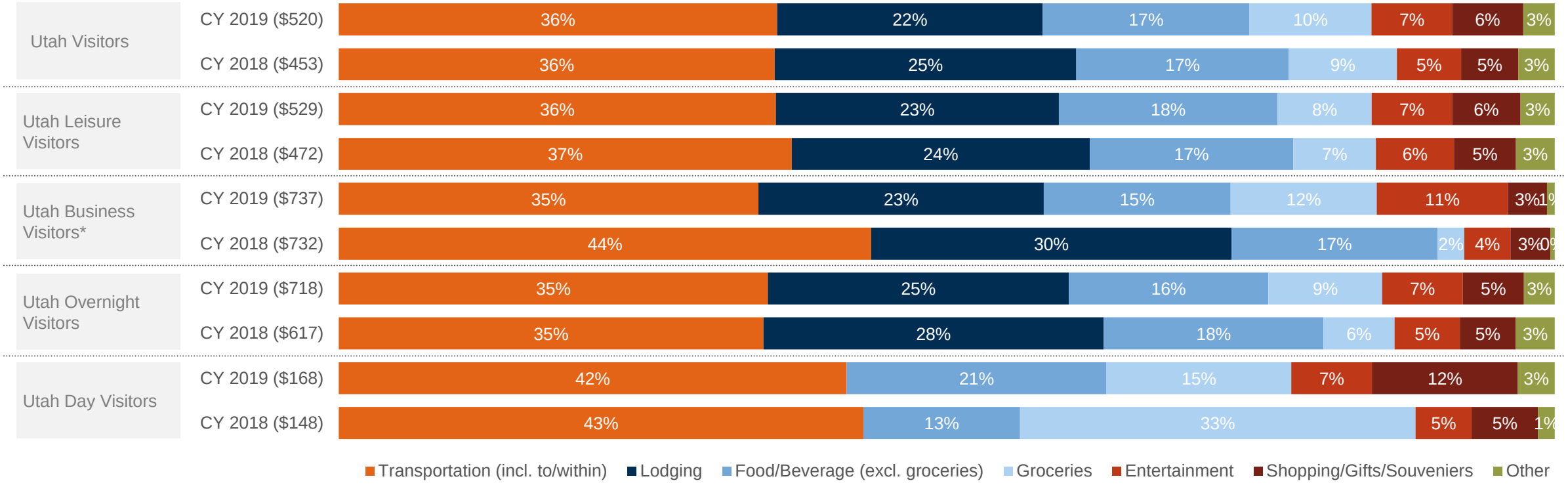
	U.S. Domestic Travel		Utah Visitors		Utah Leisure Visitors		Utah Leisure Overnight Visitors		Utah Leisure Day Visitors		Utah Leisure In-State Visitors		Utah Leisure Out-of-State Visitors	
	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019
Average Travel Party Size	2.6	2.6	2.8	3.2	3.0	3.3	2.9	3.2	3.2	3.5	3.1	3.4	2.8	3.1
Adults in Travel Party														
One Adult	30%	30%	26%	21%	25%	17%	27%	17%	21%	15%	29%	17%	21%	15%
Two Adults	54%	53%	59%	58%	60%	62%	58%	61%	61%	66%	59%	64%	60%	60%
Three Adults	8%	9%	6%	11%	7%	11%	7%	11%	8%	11%	4%	12%	10%	9%
Four or More Adults	8%	8%	10%	10%	9%	11%	9%	12%	10%	8%	8%	7%	9%	16%
Family Travel														
Travel with Children	29%	33%	31%	41%	35%	45%	34%	44%	44%	47%	42%	54%	29%	34%
Average Children	1.9	1.9	2.3	2.3	2.4	2.3	2.4	2.1	2.3	2.6	2.6	2.3	2.2	2.1
Travel with Children from Household	26%	29%	27%	38%	30%	42%	29%	42%	38%	43%	38%	51%	23%	31%
Average Children from Household	1.7	1.7	2.2	2.1	2.3	2.2	2.3	2.0	2.3	2.4	2.5	2.2	2.0	2.0

Utah benefited from increased trip spending per travel party across all segments

- Overall, travel parties visiting Utah in 2019 on average spent $520 per trip, an increase of 15% compared to the year before. *(see appendix for numeric spend figures by category)*
- Although business travelers to Utah have the highest average trip spend, they account for a much smaller portion of total trips to the state; therefore, the spending increase observed can largely be attributed to greater spending among leisure travelers.

Average Spend for Utah Trips by Segment

Total Spending by Travel Party (including 0)



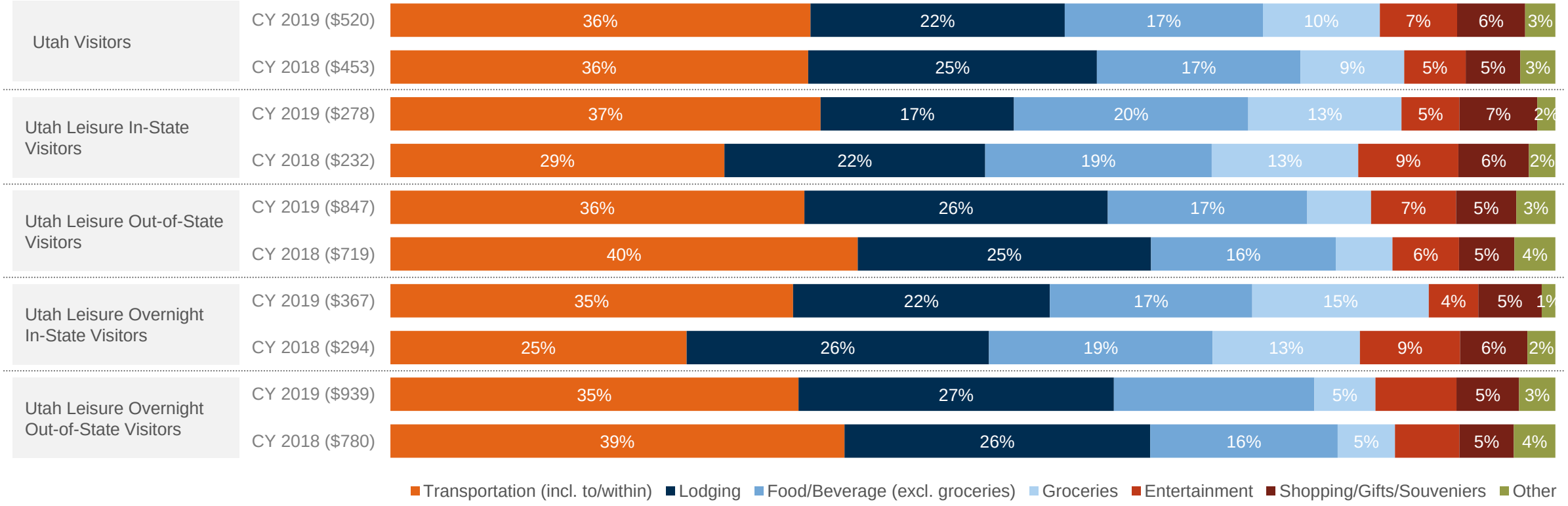
Note: Transportation includes transportation to/within the state, Other includes amenities/other
*Sample <60

Utah trip spend increases by 12% or more among leisure segments

- Among overall leisure travel parties, spending increased within all categories—particularly food/beverages and groceries—helping to propel average leisure trip spend in 2019 to a 12% increase year-over-year. (see appendix for numeric spend figures by category)
- Leisure overnight out-of-state travel parties continue to be Utah's highest spenders, with an average trip spend of $939, up 20% year-over-year.

Average Expenditure of Utah Visitors by Segment

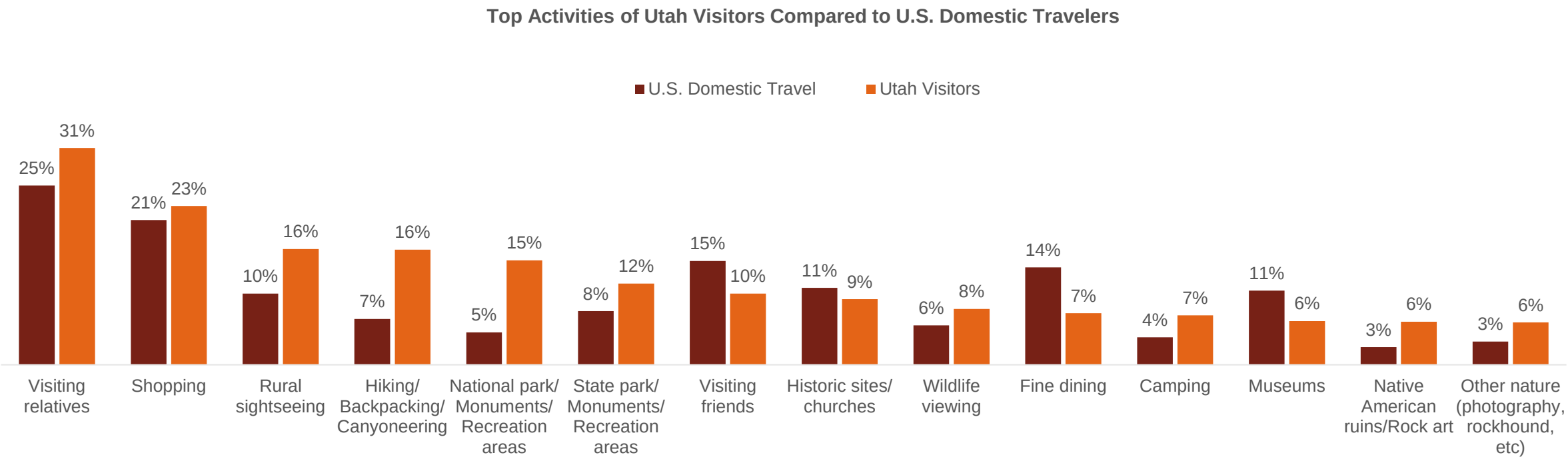
Total Trip Spending for Entire Travel Party (including 0)



Note: Transportation includes transportation to/within the state, Other includes amenities/other

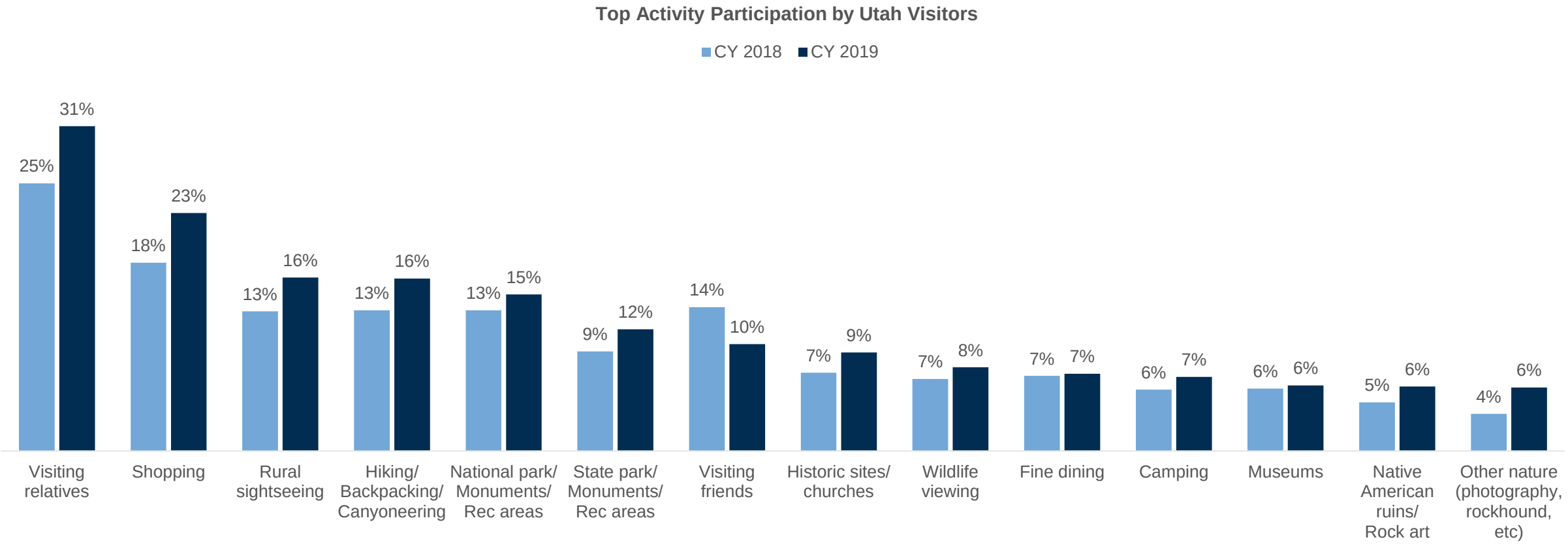
Utah visitors tend to participate more in outdoor and nature activities than overall U.S. domestic travelers

- Activities Utah visitors gravitate more to than overall U.S. travelers include rural sightseeing, national and state parks/monuments/recreation areas, wildlife viewing, camping, Native American ruins/rock art, and other nature activities (e.g. photography, rockhound, etc.)



Note: activity percentages shown reflect any participation, regardless of whether the activity motivated their trip; therefore, representing different information than niche activity percentages

Top activity participation continues to increase for outdoor and nature related activities among visitors to Utah



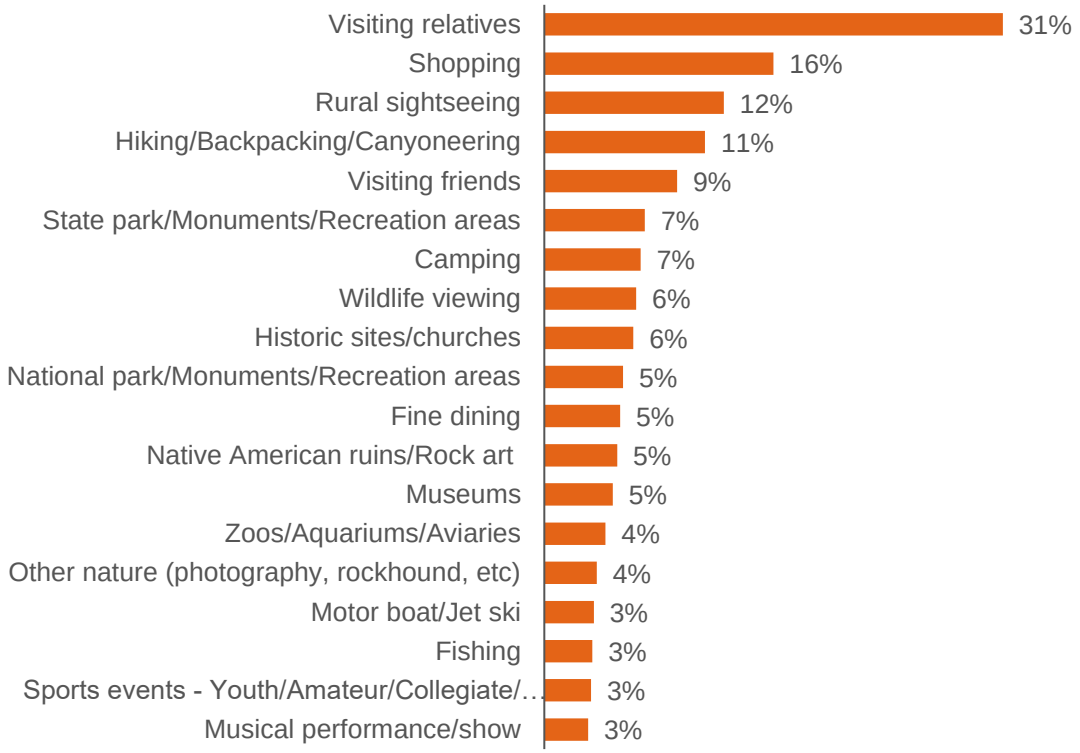
Omnitrak

Note: activity percentages shown reflect any participation, regardless of whether the activity motivated their trip; therefore, representing different information than niche activity percentages

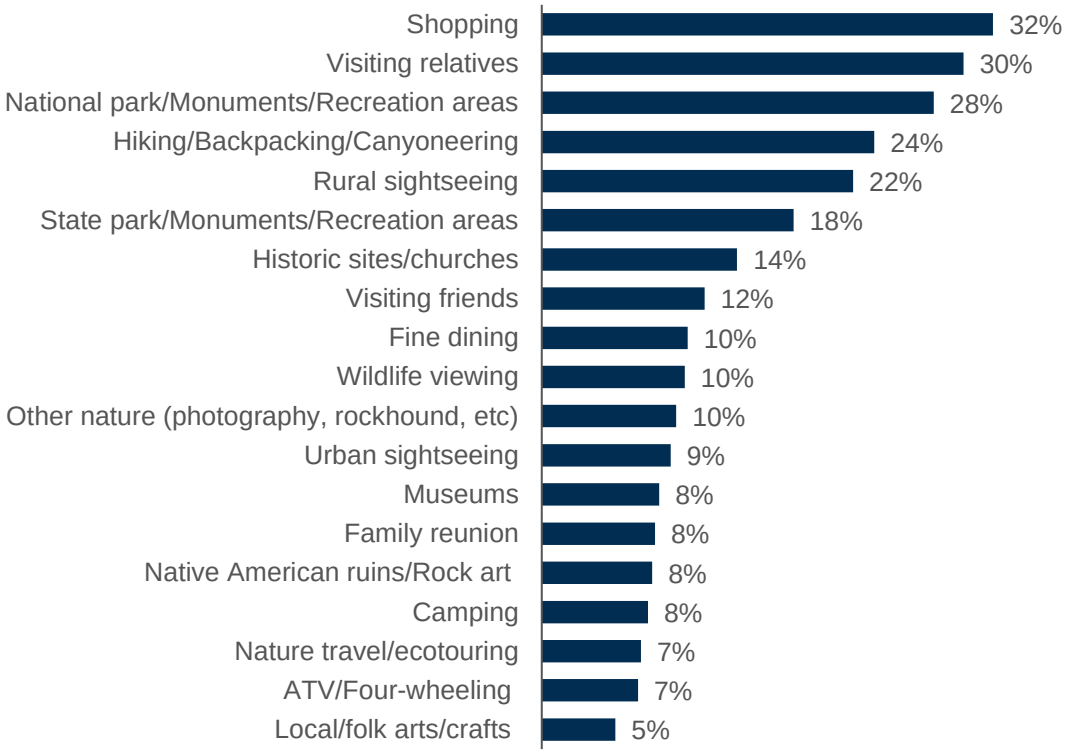
Utah's in-state and out-of-state visitors enjoy different activities

- Out-of-state visitors are far more likely to have shopped whilevisiting the state. They are also more likely to have participated in outdoor and nature related activities, such as national parks, hiking, rural sightseeing, and state parks.

Top Activity Participation of Utah In-State Visitors



Top Activity Participation of Utah Out-of-State Visitors



Note: activity percentages shown reflect any participation, regardless of whether the activity motivated their trip; therefore, representing different information than niche activity percentages

Niche Vacation Motivations

Niche activities can be leveraged to motivate travel to Utah, particularly the Adventure niches and the State/National Park niche

Visitor characteristics vary between the niche activities motivating travel:

- Hard Adventurer: 20% of leisure trips, second highest income
- Soft Adventurer: 20% of leisure trips, shortest stay
- State/National Parks: 13% of leisure trips, highest overnight, longest stay, highest spend, lowest Utah residents, highest neighbor states
- Historic Interest: 8% of leisure trips, second lowest neighbor states
- Cultural Interest: 5% of leisure trips (smallest share), highest Utah residents, lowest income
- Entertainment: 8% of leisure trips, youngest, most children in household

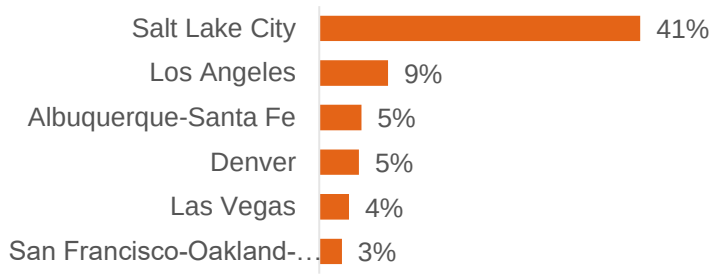
	Utah Leisure Visitors	Travelers Motivated by Niche Activity to Visit Utah:					
		Hard Adventure	Soft Adventure	State/National Parks	Historical Interest	Cultural Interest	Entertainment
% of Leisure Trips:	100%	20%	20%	13%	8%	5%	8%
Demographics:							
Average Age	42.5	41.7	46.9	48.2	44.6	41.2	34.8
Average Household Income	$79,400	$92,100	$84,900	$109,500	$81,600	$65,900	$75,600
Children <18 in Household	49%	41%	54%	33%	46%	48%	63%
Residence							
Utah	54%	39%	47%	18%	53%	71%	57%
Neighbor State	19%	25%	27%	28%	10%	8%	22%
Overnight							
% of Overnight Trips:	49%	82%	79%	88%	84%	71%	71%
Average Nights (excl. 0)	3.5	3.7	3.3	4.1	3.4	3.6	3.8
Spending							
Average Spend Per Utah Trip/Party	$529	$861	$487	$1,120	$863	$455	$639

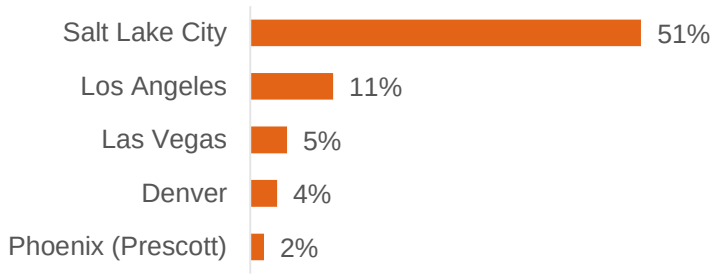
Note: niche activity figures reflect Utah visitors who said an activity within the niche category was a primary/secondary reason for visit (see glossary for niche category definitions); since it's possible for an activity as a primary reason and secondary reason for visit to fall in different niches,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

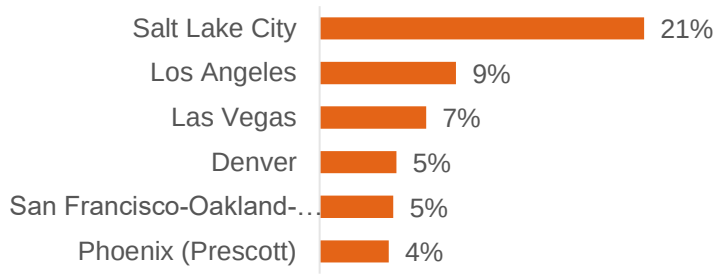
Utah could potentially expand its visitor base by targeting travel markets with a propensity to travel for niche activities that Utah offers

Top Origin DMAs for Niche Activity Travelers Visiting Utah and U.S.

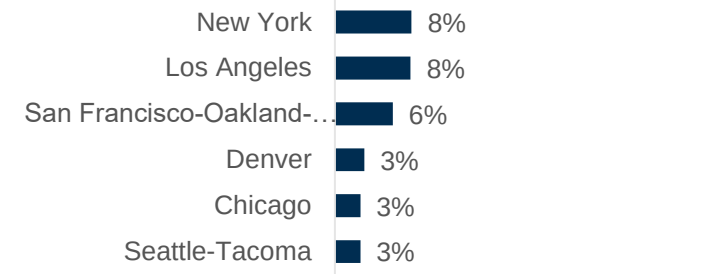
Utah Niche Visitors

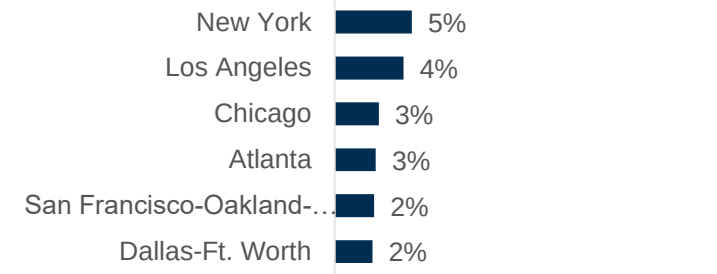


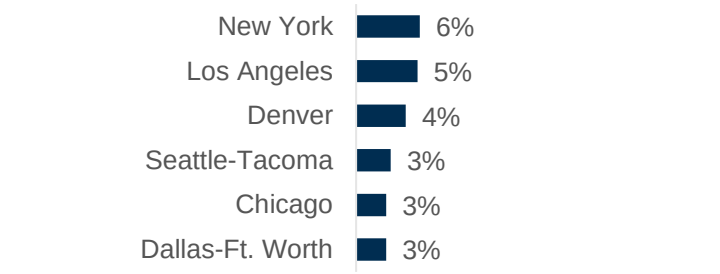




U.S. Niche Travelers





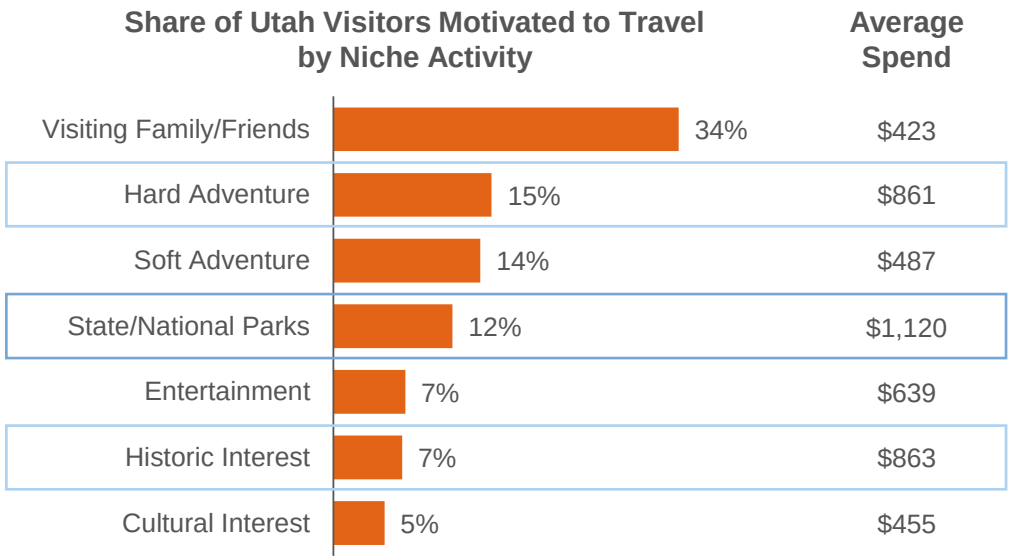


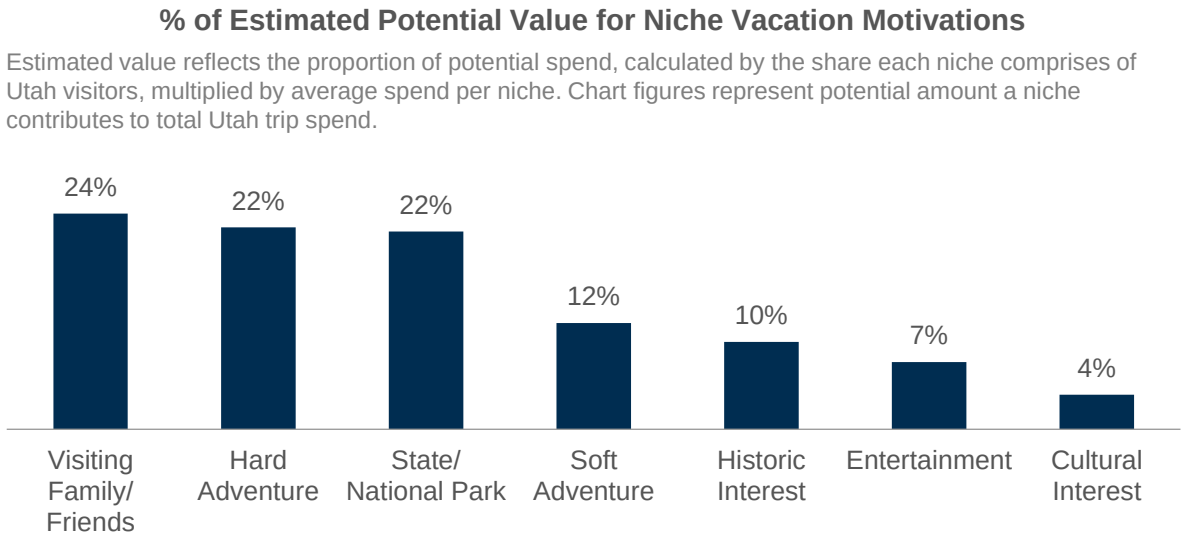
Note: origin DMA figures combines three years of data to increase sample and stabilize abnormal fluctuations. Niche activity figures reflect Utah visitors who said an activity within the niche category was a primary/secondary reason for visit (see glossary for niche category definitions); since it's 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:

- Hard Adventure and State/National Parks activity niches offer the most potential value outside of those who visit family/friends. In particular, the State/National Parks niche draws visitors in from farther away and is enhanced further by above average spending and longer stays



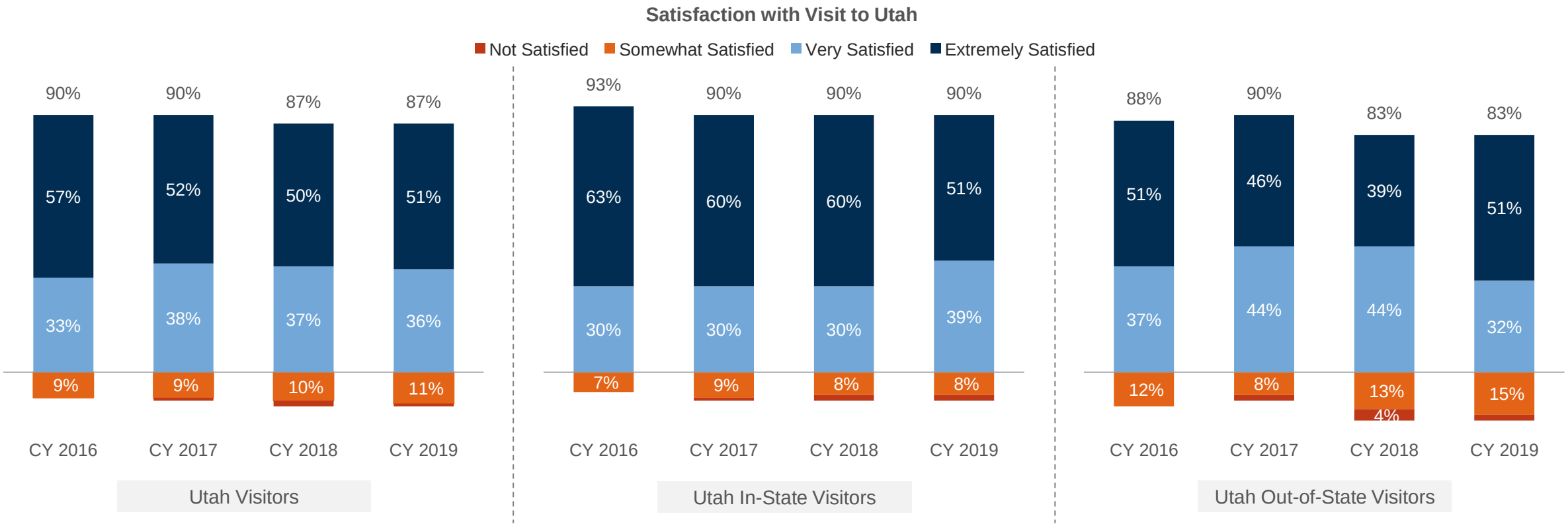


Note: niche activity figures reflect Utah visitors who said an activity within the niche category was a primary/secondary reason for visit (see glossary for niche category definitions); since it's possible for an activity as a primary reason and secondary reason for visit to fall in different niches,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

Trip Satisfaction and Travel Intent

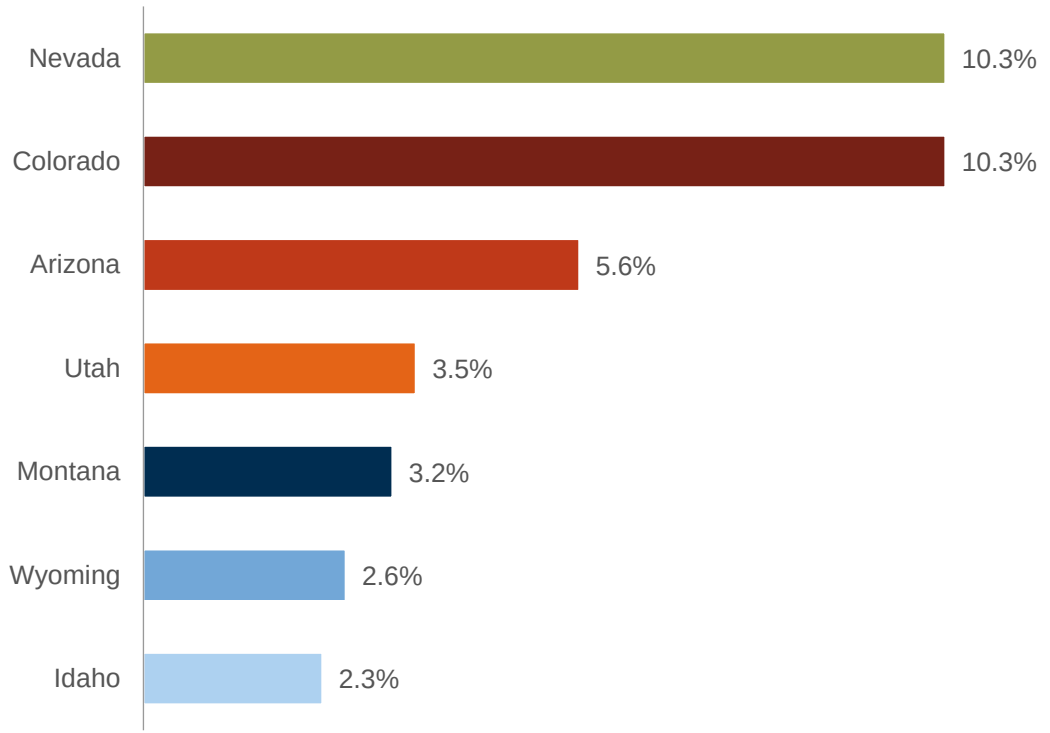
Net positive satisfaction among Utah visitors in 2019 remained consistent with the previous year, with 87% very/extremely satisfied with their Utah visit, a level slightly lower than two years ago

- Positive satisfaction continues to be highest among in-state visitors. Net positive satisfaction among both in-state and out-of-state travelers remained on par with the previous year.



Leisure travel intent to visit Utah fell to its lowest level in five years

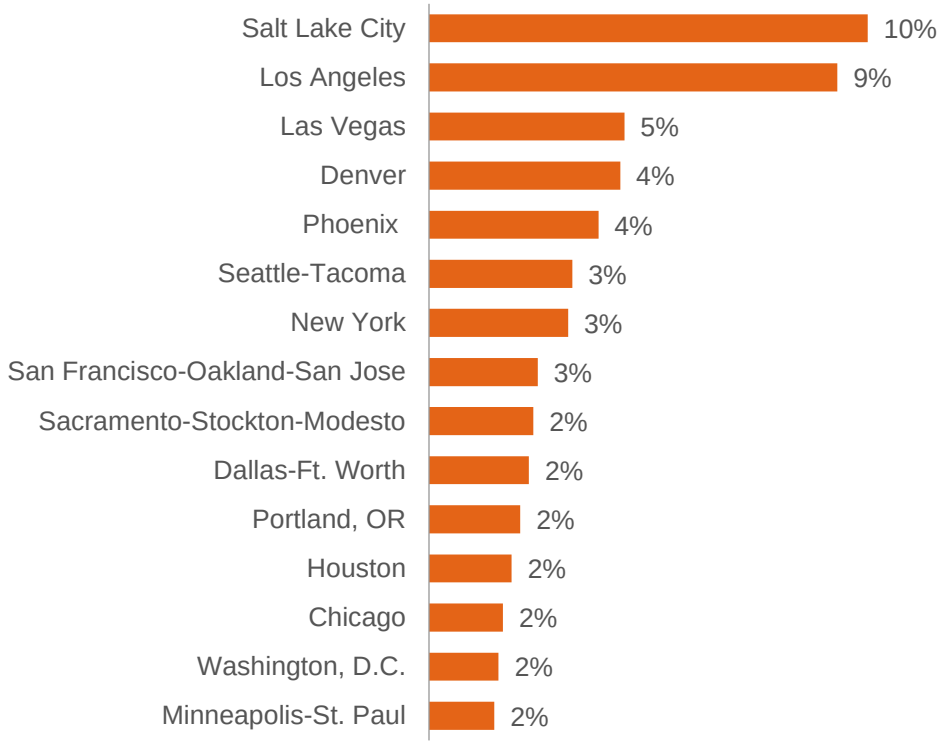
- A smaller portion of U.S. travelers in CY 2019 indicated plans to visit Utah for leisure over the next 2 years. Although intent does not always translate into fewer trips, it can be an indication of what could come.
- With many U.S. travelers planning a leisure visit to a neighboring state, Utah could potentially target markets where these travelers live to encourage them to also consider visiting Utah.



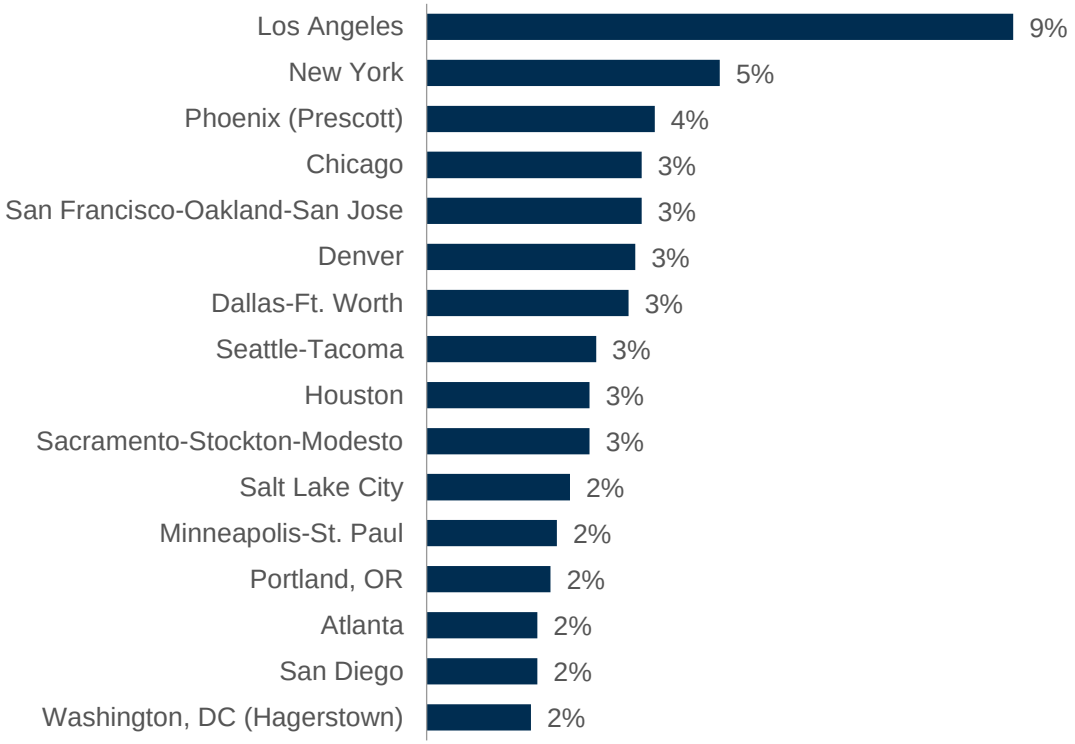
Leisure intent to visit Utah is strongest within its own borders and in nearby markets, particularly Los Angeles

- Proximity influences leisure plans, with most U.S. travelers intending to visit Utah residing inside the state or in a nearby state, although a few East coast markets also appear in the top.

Top Origin DMAs for Intent to Visit Utah



Top Origin DMAs for Intent to Visit Neighbor State



DEMOGRAPHICS

Utah visitors are more likely to be under age 35 and earn a mid level income—ranging from $50,000 to $99,999 annually—than U.S. domestic travelers

- More than a third (37%) of Utah's leisure visitors are ages 25-34, with this age cohort representing 41% of leisure in-state travelers and 31% of leisure out-of-state 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 Overnight Visitors		Utah Leisure Day Visitors	
	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019
Age																
18 - 24	9%	8%	10%	7%	10%	7%	12%	7%	17%	8%	8%	7%	13%	9%	10%	5%
25 - 34	24%	24%	25%	34%	25%	20%	25%	37%	27%	43%	22%	31%	24%	41%	26%	29%
35 - 44	17%	19%	17%	19%	16%	15%	19%	19%	21%	19%	17%	19%	16%	14%	29%	30%
45 - 54	17%	16%	15%	12%	33%	46%	15%	11%	11%	8%	20%	14%	16%	10%	11%	12%
55+	33%	33%	33%	28%	16%	12%	29%	26%	24%	23%	34%	29%	30%	26%	24%	25%
Average	45.6	45.7	45.6	44.2	42.6	44.8	43.5	42.5	40.4	40.9	46.8	44.6	43.9	42.0	42.1	43.7
Income																
Less than $50,000	28%	25%	36%	22%	33%	18%	33%	22%	49%	21%	17%	25%	32%	24%	35%	19%
$50,000 - $74,999	20%	24%	18%	32%	7%	6%	22%	35%	21%	48%	22%	20%	21%	32%	23%	44%
$75,000 - $99,999	15%	18%	20%	21%	17%	48%	16%	15%	11%	16%	20%	15%	15%	14%	17%	19%
$100,000 - $149,999	25%	22%	18%	17%	24%	11%	21%	18%	13%	12%	30%	25%	23%	19%	17%	16%
$150,000 or more	12%	11%	8%	8%	18%	17%	9%	9%	7%	3%	10%	16%	9%	12%	8%	2%
Average	$88,110	$86,030	$77,220	$79,760	$96,190	$96,410	$79,540	$79,420	$65,280	$69,050	$94,200	$92,560	$80,230	$82,350	$77,090	$72,560

Utah visitors are more likely to have children under 18 in their household than overall U.S. travelers (46% vs. 39%) and be married (68% vs. 61%)

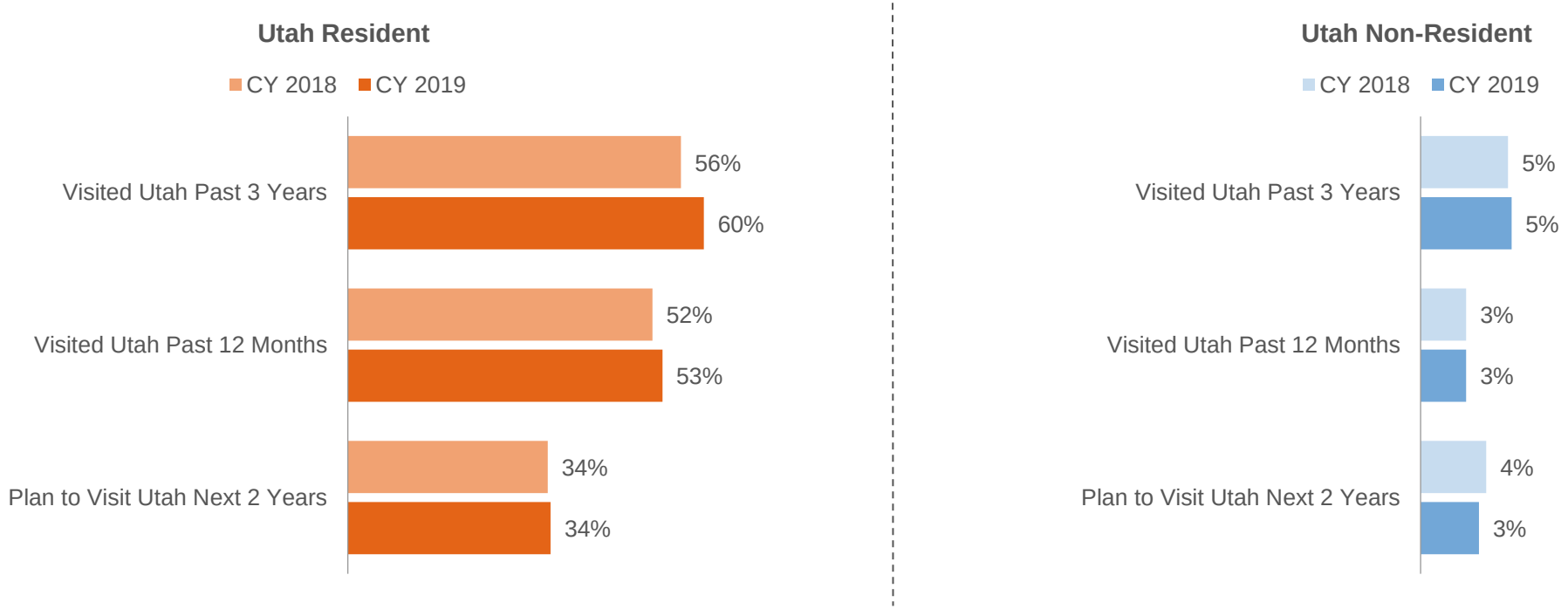
	U.S. Domestic Travel		Utah Visitors		Utah Business Visitors*		Utah Leisure Visitors		Utah Leisure In-State Visitors		Utah Leisure Out-of-State Visitors		Utah Leisure Overnight Visitors		Utah Leisure Day Visitors	
	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019
Now Married	61%	61%	65%	68%	55%	45%	64%	70%	66%	77%	62%	62%	61%	69%	74%	72%
Never Married	26%	25%	23%	20%	32%	52%	26%	18%	26%	11%	26%	27%	28%	20%	17%	14%
Household Composition																
One Person	15%	14%	12%	10%	21%	47%	14%	8%	10%	7%	18%	8%	15%	6%	10%	11%
Two People	39%	38%	42%	32%	17%	18%	40%	33%	30%	23%	50%	46%	40%	36%	39%	25%
Three People	19%	20%	13%	18%	34%	12%	10%	17%	11%	17%	9%	17%	10%	19%	12%	13%
Four People	17%	17%	15%	20%	11%	7%	16%	20%	19%	26%	13%	14%	16%	20%	16%	21%
Five or More People	11%	12%	19%	20%	17%	15%	20%	22%	30%	27%	10%	16%	19%	19%	23%	30%
Children																
Children in Household	37%	39%	38%	46%	37%	40%	40%	49%	52%	58%	28%	38%	36%	48%	52%	51%
Ethnicity/Hispanic																
Caucasian	86%	85%	91%	93%	86%	97%	90%	92%	92%	97%	89%	86%	91%	90%	87%	96%
Asian/Pacific Islander	1%	1%	1%	2%	6%		1%	2%	1%	0%	0%	4%	0%	2%	1%	1%
Hispanic	7%	9%	4%	5%	7%	6%	4%	6%	3%	4%	6%	9%	3%	8%	8%	2%
Employment																
Full-time	52%	51%	40%	39%	59%	86%	43%	37%	40%	38%	46%	36%	42%	42%	45%	28%
Part-time	13%	13%	14%	20%	15%	4%	15%	21%	17%	22%	14%	20%	17%	19%	9%	24%
Retired	20%	19%	22%	18%	4%	3%	18%	18%	13%	15%	24%	21%	19%	20%	14%	14%

Competitive Environment

Similar to the past, Utah draws a large share of visitors from within

- More than half (53%) of Utah residents who traveled in the past year traveled in-state and around one-third (34%) of travelers residing in Utah indicate plans to travel within the state over the next 24 months.
- A similar portion of non-residents report traveling to Utah in the past year, but slightly fewer non-residents report intentions to do so in the near future.

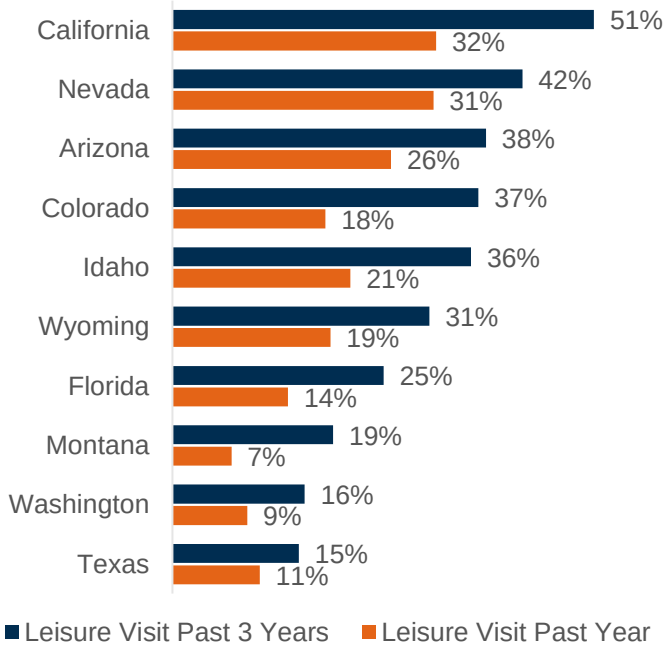
Utah Visitation Patterns
(Household Level, All Travelers)



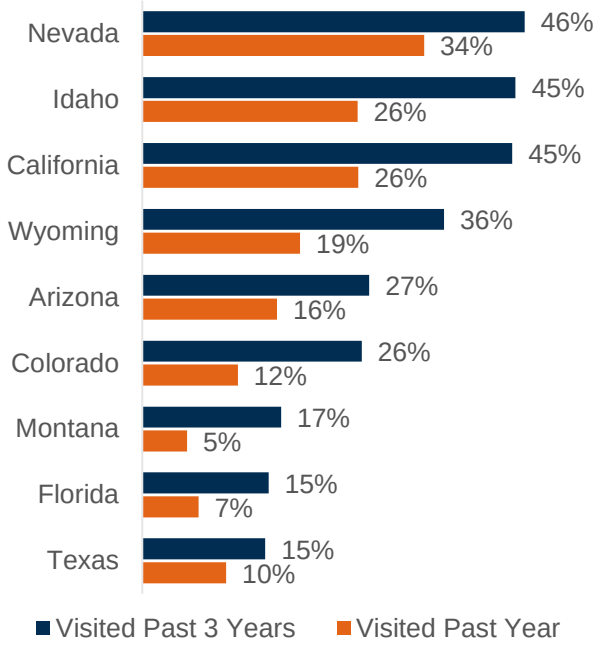
Western states of California and Nevada are Utah's strongest competitors for leisure visitors, followed by Arizona, Colorado, Idaho, and Wyoming

- Border states and nearby California rank among the top other states Utah's in-state visitors are drawn to, which further highlights thast proximity matters.
- Among out-of-state visitors, Utah's strongest competitors are mostly western states, although two popular eastern states—Florida and New York—also appear in the competitive mix

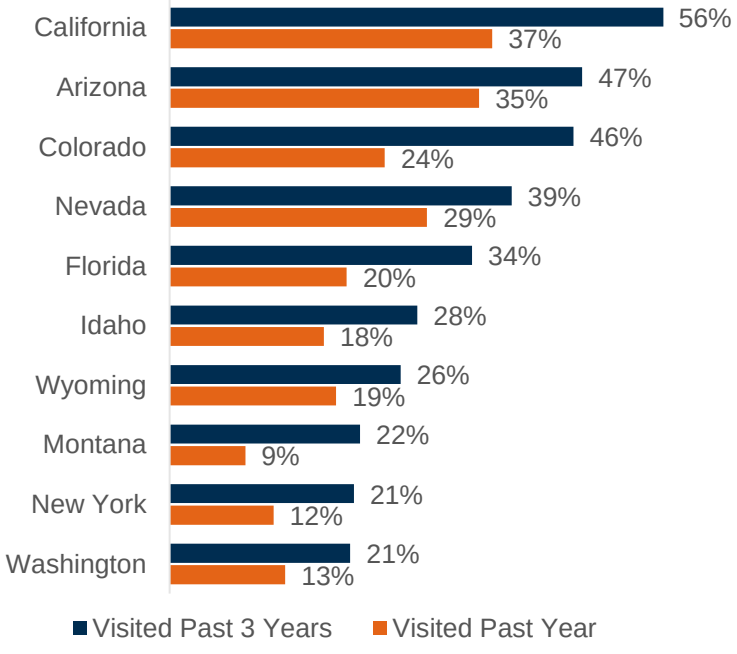
Other States Visited by Utah Leisure Visitors
(key competitors ranked by visited past 3 years)



Other States Visited by Utah In-State Visitors
(key competitors ranked by visited past 3 years)

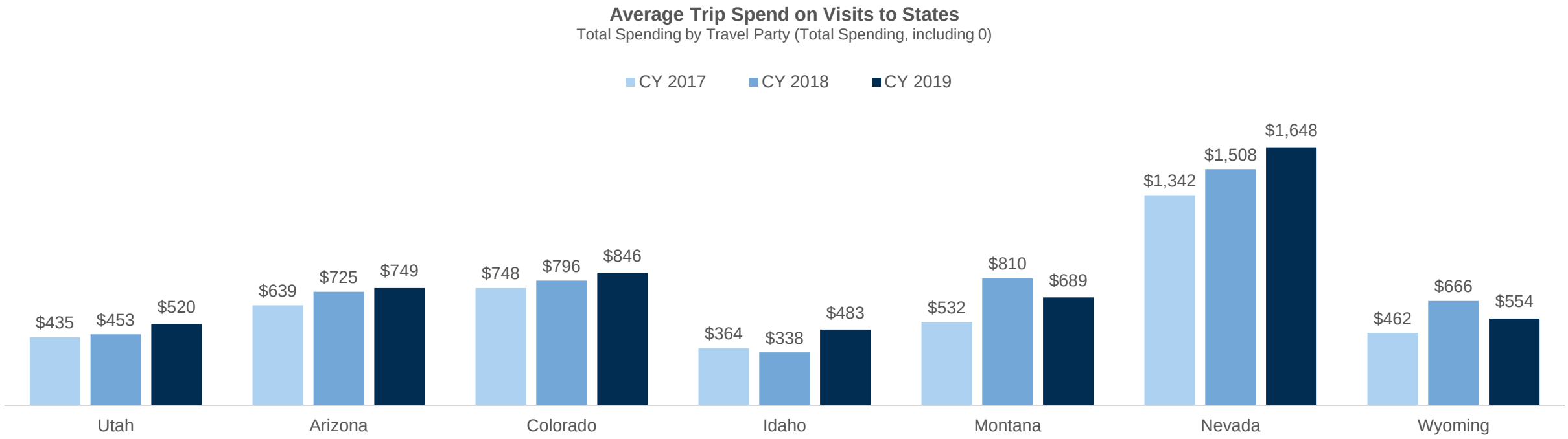


Other States Visited by Utah Out-of-State Visitors
(key competitors ranked by visited past 3 years)



Despite Utah's visitors spending more, the state trails of most nearby competitors in terms of average trip spend

- Utah's average trip spending only exceeds that of Idaho and particularly lags states with more urban activities available, such as Colorado, Arizona, and most notably, Nevada.
- Average spending was increased for a second consecutive year in four states—Utah, Arizona, Colorado, and Nevada—and in Idaho, which observed a drop in 2018. At the same time, trip spending declined for visits to Montana and Wyoming, both of which experienced an increase the prior year.

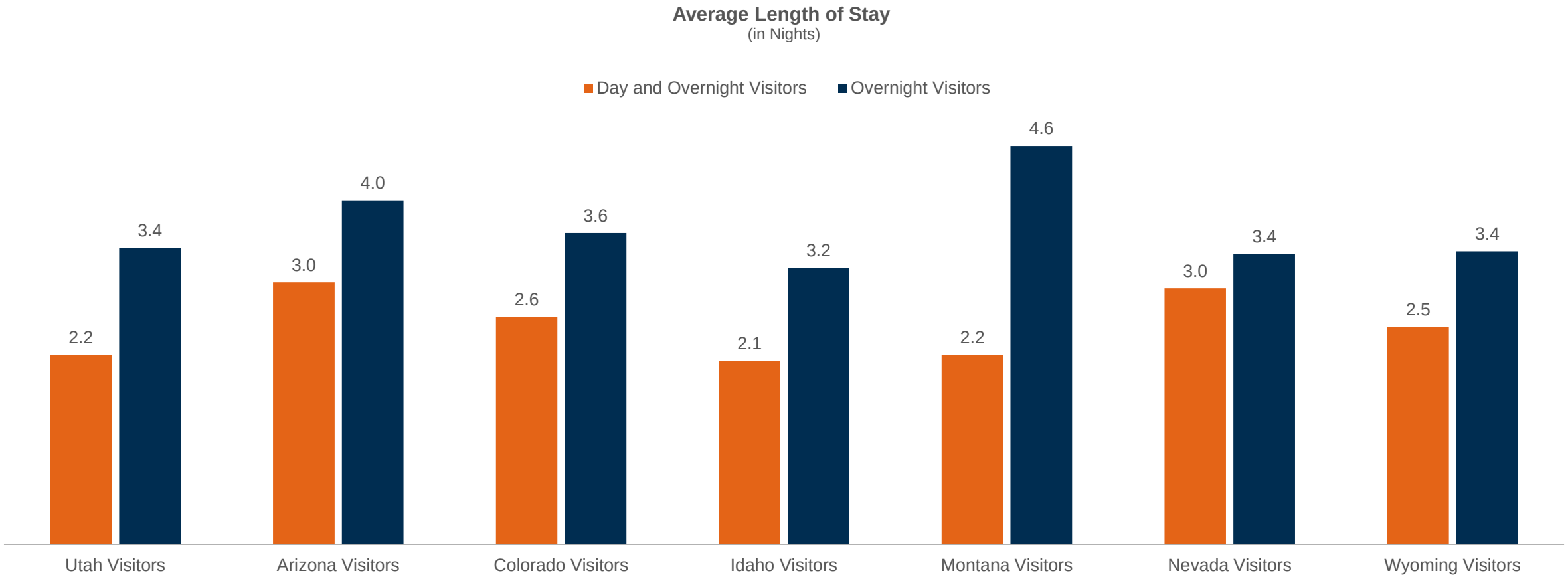


Utah's portion of leisure trips resembles neighboring Idaho and Montana, while its share of business trips tops bordering states

- Driving dominates Utah trips and all neighboring state trips,

	Utah Visitors		Arizona Visitors		Colorado Visitors		Idaho Visitors		Montana Visitors		Nevada Visitors		Wyoming Visitors	
	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019
Primary Trip Purpose														
Leisure (net)	72%	75%	82%	82%	79%	79%	85%	74%	71%	75%	83%	88%	72%	84%
Visit Friends/Relatives	33%	41%	43%	49%	37%	41%	40%	38%	27%	30%	24%	30%	26%	38%
Outdoor Recreation	15%	13%	11%	10%	17%	15%	13%	13%	16%	13%	6%	8%	20%	16%
Entertainment/Sightseeing	13%	11%	14%	13%	12%	12%	13%	7%	13%	9%	29%	29%	17%	12%
Other Personal	12%	10%	14%	11%	13%	10%	20%	17%	16%	22%	24%	20%	9%	18%
Personal Business	18%	7%	6%	6%	9%	8%	9%	14%	16%	15%	6%	3%	3%	6%
Business	7%	14%	10%	10%	8%	11%	4%	8%	7%	4%	9%	7%	18%	9%
Other	4%	4%	2%	2%	4%	2%	2%	5%	7%	6%	1%	2%	7%	2%
Primary Transportation Mode														
Own Car/Truck	74%	69%	66%	61%	69%	66%	82%	78%	78%	79%	49%	52%	74%	68%
Rental Vehicle	7%	8%	7%	10%	6%	10%	6%	8%	7%	4%	10%	10%	11%	12%
Camper/RV	1%	1%	2%	3%	1%	2%	1%	2%	2%	2%	1%	1%	1%	2%
Airplane	11%	8%	18%	17%	17%	15%	7%	8%	8%	11%	35%	31%	8%	11%
Other	7%	14%	7%	9%	6%	7%	4%	4%	5%	4%	6%	6%	6%	7%

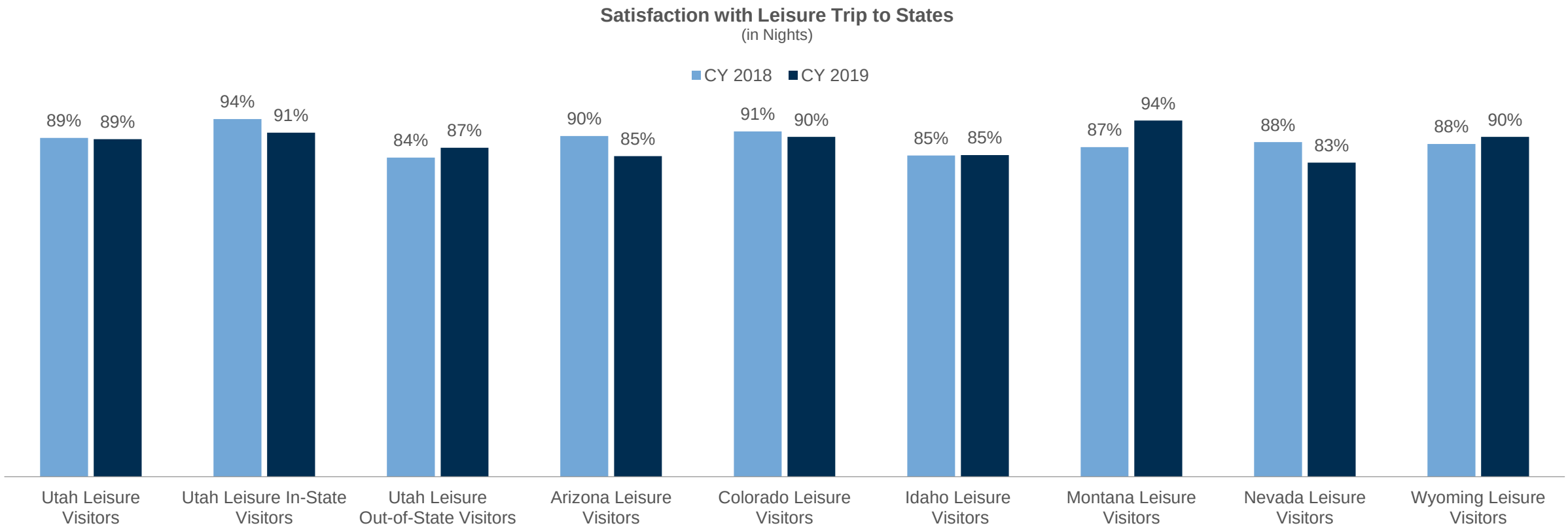
Utah overnight visitors stay nearly the same amount of nights as visitors to most of its neighbor states



Utah's increase in family travel enables the state to surpass all other states in the competitive set in terms of portion of family travel and average travel party size

	Utah Visitors		Arizona Visitors		Colorado Visitors		Idaho Visitors		Montana Visitors		Nevada Visitors		Wyoming Visitors	
	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019
Average Travel Party Size	2.8	3.2	2.7	2.7	2.5	2.7	2.6	2.7	2.8	2.8	2.7	2.7	2.8	2.8
Adults in Travel Party														
One Adult	26%	21%	30%	33%	29%	34%	26%	18%	25%	18%	24%	24%	24%	25%
Two Adults	59%	58%	53%	51%	55%	50%	62%	69%	60%	63%	55%	56%	55%	56%
Three Adults	6%	11%	8%	8%	9%	7%	6%	7%	6%	12%	10%	7%	8%	4%
Four or More Adults	10%	10%	9%	9%	7%	9%	7%	6%	9%	7%	12%	13%	13%	15%
Family Travel														
Travel with Children	31%	41%	31%	38%	28%	32%	28%	34%	33%	33%	20%	23%	26%	25%
Average Number of Children	2.3	2.3	2.0	1.9	1.8	2.0	2.1	2.0	2.2	2.1	1.9	1.9	1.9	2.0
Travel with Children from Household	27%	38%	27%	35%	23%	29%	25%	31%	29%	31%	17%	21%	23%	24%
Average Number of Children from Household	2.2	2.1	1.7	1.7	1.7	1.8	1.9	1.9	2.0	1.9	1.7	1.7	1.8	1.7

Utah performs well among the competitive set for leisure trip satisfaction, with a boost in satisfaction among out-of-state visitors offsetting a dip among in-state visitors



Salt Lake City continues to be the top destination in Utah among visitors, but the popularity of Utah destinations varies between in-state and out-of-state visitors

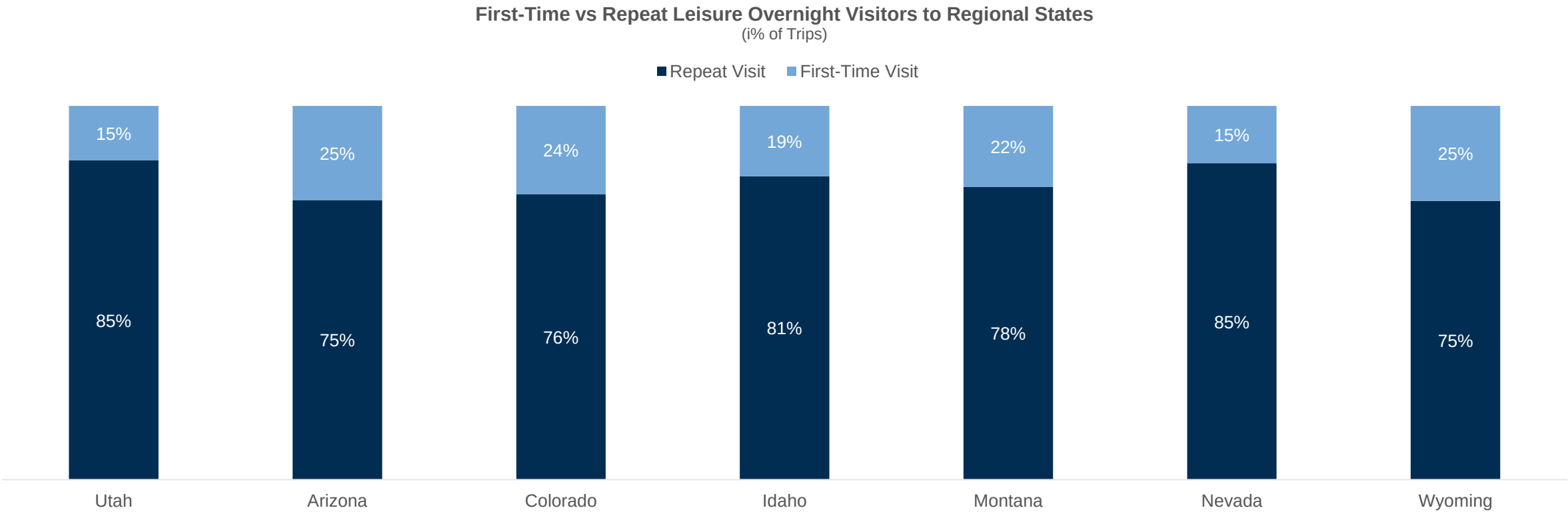
- Out-of-state visitors tend to gravitate more to Salt Lake City than in-state visitors. They are also more drawn to destinations where Utah's natural wonders are located.

Utah Visitor Destinations	CY 2018	CY 2019
Salt Lake City	31%	30%
Provo/Orem	15%	21%
Other	21%	16%
St. George	20%	15%
Cedar City	10%	12%
Moab	6%	7%
Bryce Canyon	5%	6%
Davis County/Lagoon	4%	6%
Ogden	6%	5%
Logan	6%	5%
Park City	8%	5%
Zion/Springdale	8%	5%
Brigham City	2%	4%
Kanab	2%	4%
Monument Valley/Monticello/Mexican Hat	1%	4%
Escalante/Boulder	2%	2%
Torrey/Capitol Reef	2%	2%

Utah In-State Visitor Destinations	CY 2018	CY 2019
Other	29%	24%
Salt Lake City	25%	23%
Provo/Orem	22%	21%
Davis County/Lagoon	8%	10%
St. George	16%	8%
Ogden	5%	7%
Logan	4%	6%
Cedar City	9%	6%
Brigham City	2%	6%
Park City	5%	4%
Moab	3%	3%
Vernal	1%	3%
Kanab	1%	2%
Zion/Springdale	5%	2%
Garden City/Bear Lake	1%	1%
Torrey/Capitol Reef	1%	1%
Bryce Canyon	2%	1%

Utah Out-of-State Visitor Destinations	CY 2018	CY 2019
Salt Lake City	38%	45%
St. George	23%	22%
Provo/Orem	9%	20%
Cedar City	11%	17%
Moab	9%	15%
Bryce Canyon	8%	14%
Zion/Springdale	11%	9%
Other	13%	9%
Monument Valley/Monticello/Mexican Hat	1%	8%
Park City	10%	7%
Kanab	3%	6%
Ogden	7%	5%
Escalante/Boulder	2%	4%
Logan	8%	4%
Torrey/Capitol Reef	3%	3%
Brigham City	2%	2%
Davis County/Lagoon	1%	1%

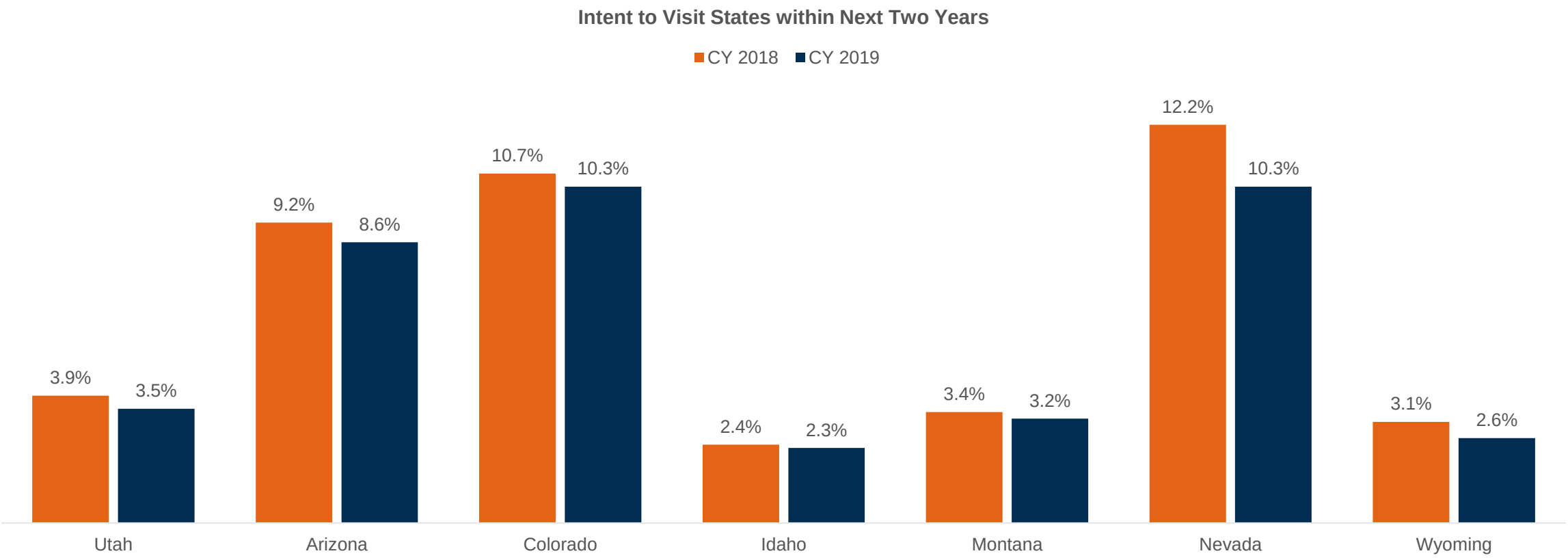
Utah visitors are familiar with the state, with 85% of Utah's 2019 visitors reporting they previously visited the state at least once before over the past five years



Omnitrak

Note: only respondents who stayed overnight in a state are asked whether it was their first time visiting the state or have visited it before in past five years

Like Utah, all other states in the competitive set experienced a decrease in visit intent, with Nevada experiencing the largest decline



- Note: figures based on all respondents qualifying for the survey by having traveled in the previous month

Demographically, visitors vary across different states

- Utah visitors tend to have larger households than all states in the competitive set and are more likely to have children in their household than other states in the set, with the exception of Idaho.

	Utah Visitors		Arizona Visitors		Colorado Visitors		Idaho Visitors		Montana Visitors		Nevada Visitors		Wyoming Visitors	
	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019
Average Age	45.6	44.2	44.6	44.3	44.2	44.0	46.2	45.6	48.2	49.5	46.3	46.1	46.8	51.0
Average Household Income	$77,220	$79,760	$85,590	$92,040	$86,210	$86,470	$80,290	$75,820	$80,370	$71,330	$99,190	$92,340	$79,850	$79,560
Marital Status														
Now Married	65%	68%	57%	63%	58%	60%	67%	71%	63%	75%	60%	57%	66%	67%
Never Married	23%	20%	30%	24%	28%	25%	22%	17%	25%	16%	26%	30%	22%	20%
Family														
Children in Household	38%	46%	38%	44%	33%	39%	38%	48%	35%	37%	32%	36%	33%	28%
Household Composition														
One Person	12%	10%	16%	13%	15%	15%	11%	8%	16%	9%	15%	15%	17%	15%
Two People	42%	32%	38%	35%	45%	37%	46%	39%	46%	49%	43%	35%	45%	52%
Three or More	47%	58%	46%	52%	40%	48%	44%	54%	38%	41%	42%	49%	38%	33%
Ethnicity/Hispanic Origin														
Caucasian	91%	93%	85%	86%	91%	91%	94%	91%	95%	96%	77%	75%	91%	97%
Asian/Pacific Islander	4%	2%	5%	3%	3%	3%	3%	2%	3%	2%	13%	11%	4%	2%
Hispanic	4%	5%	14%	14%	10%	11%	4%	6%	3%	3%	12%	14%	4%	3%
Employment														
Full-time Employment	40%	39%	49%	53%	48%	52%	42%	42%	46%	38%	56%	53%	46%	41%
Retired	24%	22%	16%	17%	18%	16%	20%	22%	13%	26%	12%	15%	17%	10%

METHODOLOGY & GLOSSARY

Research Methods

Target Audience – U.S. Households

- Weighted demographically (region, age, income, household size, marital status) to reflect the characteristics of US households
- Calculations count trips taken in each state 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
- Some data represent person-trips – these take into account the immediate travel party size for each household as well
- Panels historically underrepresent business travelers especially the “road warrior” business traveler, as survey cooperation rates tend to be low due to the very nature of them traveling

Methodology/Timeframe

- TravelTrak America is a web-based study with monthly e-mail invitations sent to representative households from the Kantar TNS panel and its partners
- Data collection focuses on travel taken during the past month
- The field period runs for two weeks, usually starting in the middle of the first week

Sample – Utah Visitors and Total U.S. Domestic Travelers: January – December 2019

	2018 Unweighted	2018 Demographic Weighted	2019 Unweighted	2019 Demographic Weighted
Total U.S. Traveler Respondents	61,924	64,928	60,900	69,033
Total U.S. Domestic Traveler Respondents	59,155	62,220	58,003	65,609
Total Utah Visitors Interviewed	657	755	549	765
Total Utah In-State Visitors Interviewed	314	366	277	444
Total Utah Out-of-State Visitors Interviewed	343	389	272	321

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).
Respondent Level	Respondent information – one count per respondent.
State 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 (one-way) away from home or overnight. Excludes commuters or commercial travel (i.e. flight attendants, commercial vehicle operator).
Trip Level	Information about all trips – each trip counts.
U.S. Domestic Travel	U.S. residents who visited at least one U.S. destination.
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.
Hard Adventure	Primary/secondary trip motivation: hang gliding/sky diving/base jumping, hiking/backpacking/canyoneering, mountain biking, mountain/rock climbing, scuba diving/snorkeling, water skiing, whitewater rafting/kayaking/canoeing/paddle board, biking/road biking/cycling, ATV/four-wheeling, skiing/snowboarding, other snow sports.
Soft Adventure	Primary/secondary trip motivation: fishing, horseback riding, motorboat/jet ski, bird watching, camping, caverns, nature travel/ecotouring, viewing wildlife, farms/ranches/agri-tours, hunting, other nature, rural sightseeing.
Entertainment	Primary/secondary motivation: Sports events (incl. major/professional, youth/amateur/college spectator/participant, fine dining, zoos/aquariums/aviaries, rodeo/state fair, spa/health club, special events/festivals, theme/amusement/water park, urban sightseeing.
Cultural Interest	Primary/secondary motivation: art galleries, musical theater, theater/drama, symphony/opera/concert, musical performance/show, local/folk arts/crafts, TV show/movie location.
Historical Interest	Primary/secondary motivation: historic sites/churches, museums, Native American ruins/rock art, old homes/mansions.
State/National Parks	Primary/secondary motivation: state park/monument/recreation areas and/or national park/monument/recreation area
Family/Friends	Primary/secondary motivation : visiting friends, visiting relatives, family reunion.

Appendix: Tables

Tables: Trip Expenditures Per Travel Party

	Utah Total Trips		Utah Overnight Trips		Utah Day Trips		Utah In-State Trips		Utah Out-of-State Trips		Utah Business Trips*	
	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019
Transportation (incl. to/within state)	$163	$187	$215	$253	$64	$70	$63	$112	$256	$292	$317	$254
Lodging	$112	$113	$173	$177			$43	$46	$178	$206	$214	$173
Food/Beverage (excl. groceries)	$79	$88	$111	$118	$19	$36	$39	$51	$117	$140	$123	$113
Groceries	$40	$52	$36	$67	$48	$26	$35	$55	$46	$48	$16	$89
Entertainment	$24	$34	$33	$48	$7	$11	$15	$13	$32	$64	$27	$80
Shopping/Gifts/Souveniers	$21	$30	$28	$36	$8	$20	$11	$22	$31	$42	$24	$24
Other	$14	$13	$20	$18	$2	$5	$4	$6	$23	$24	$3	$5
Total Trip Expenditure	$453	$520	$617	$718	$148	$168	$209	$306	$683	$815	$723	$737

	Utah Total Trips		Utah Leisure Trips		Utah Leisure In-State Trips		Utah Leisure Out-of-State Trips		Utah Leisure Overnight In-State Trips		Utah Leisure Overnight Out-of-State Trips	
	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019	CY 2018	CY 2019
Transportation (incl. to/within state)	$163	$187	$176	$190	$67	$103	$288	$301	$75	$127	$304	$329
Lodging	$112	$113	$116	$123	$52	$46	$181	$221	$76	$81	$205	$254
Food/Beverage (excl. groceries)	$79	$88	$79	$95	$45	$56	$114	$145	$56	$64	$126	$162
Groceries	$40	$52	$32	$41	$29	$37	$35	$46	$37	$56	$38	$49
Entertainment	$24	$34	$30	$35	$20	$14	$41	$62	$25	$16	$43	$65
Shopping/Gifts/Souveniers	$21	$30	$24	$30	$14	$19	$34	$44	$17	$20	$36	$50
Other	$14	$13	$15	$15	$5	$4	$25	$28	$7	$4	$28	$29
Total Trip Expenditure	$453	$520	$472	$529	$232	$278	$719	$847	$294	$367	$780	$939

Note: Transportation includes transportation to/within the state, Other includes amenities/other
*Sample <60

Tables: Trip Planning Sources

		U.S. Domestic Travel	Utah Visitors				
			Total	Leisure	Leisure Overnight	Leisure In-State	Leisure Out-of-State
Offline Planning Sources	Corporate travel department (in person or by phone)	2.7%	1.4%	0.3%	0.5%	0.4%	0.2%
	Destination printed material	3.7%	2.5%	3.1%	4.0%	1.4%	5.4%
	Friends/relatives	26.0%	26.6%	31.0%	35.8%	26.8%	36.2%
	Magazine	2.6%	0.7%	0.8%	1.2%	0.2%	1.7%
	Own experience	34.1%	43.4%	47.4%	50.5%	52.2%	41.4%
	TV	3.5%	0.8%	0.9%	1.1%	0.6%	1.4%
	Travel Agent (in person or by phone)	3.0%	1.1%	1.4%	2.0%	0.6%	2.5%
	Travel club (AAA)	3.1%	1.1%	1.4%	1.6%	1.0%	1.8%
	Travel provider (airline, hotel, etc.) in person or by phone	5.8%	4.8%	5.1%	7.0%	2.4%	8.5%
	Other 'offline' planning sources(s)	0.8%	1.7%	0.5%	0.7%		1.1%
Online Planning Sources	Corporate desktop travel tool/Intranet	1.6%	0.3%	0.2%	0.3%	0.4%	
	Destination website (official site of state, city or attraction)	9.0%	11.8%	14.1%	14.2%	12.8%	15.8%
	Online full service travel website (Expedia, Travelocity, etc.)	4.9%	2.7%	2.7%	3.3%	1.2%	4.5%
	Travel provider website (airline, hotel, etc.)	7.3%	5.9%	7.1%	10.1%	3.8%	11.3%
	Search engines (Google, Bing, Yahoo, etc.)	15.0%	16.1%	19.0%	21.7%	12.1%	27.7%
	Other online planning sources(s)	1.2%	0.4%	0.4%	0.6%	0.3%	0.6%
	Pinterest	2.0%	1.9%	2.4%	3.1%	1.4%	3.6%
	Facebook	6.7%	3.3%	4.0%	4.4%	3.6%	4.6%
	Instagram	3.6%	2.7%	3.0%	4.3%	1.7%	4.6%
	Twitter	2.0%	0.4%	0.5%	0.7%	0.7%	0.2%
	Blogs	1.4%	0.4%	0.4%	0.6%		1.0%
	Travel review sites (TripAdvisor, Yelp,etc.)	3.2%	2.7%	3.2%	4.6%	1.6%	5.3%
	Someone else planned for me and I don't know the method	4.3%	2.2%	1.3%	1.5%	1.7%	0.8%
	No plans were made for this destination	24.9%	24.8%	19.8%	12.8%	23.3%	15.4%

Tables: Booking Methods for Trip Components

		U.S. Domestic Travel	Utah Visitors				
			Total	Leisure	Leisure Overnight	Leisure In-State	Leisure Out-of-State
Offline Planning Sources	Corporate travel department	6.1%	2.4%	1.7%	2.2%	2.0%	1.3%
	Directly with destination or attraction (tourist/visitor center etc.) in person or by phone	10.4%	6.8%	6.2%	7.2%	4.5%	8.3%
	Directly with travel provider (e.g. airline, hotel, etc.) in person or by phone	12.2%	9.2%	11.0%	15.1%	4.3%	19.3%
	Travel Agent	3.1%	1.4%	1.8%	2.6%	1.3%	2.4%
	Travel club (e.g. AAA)	1.5%	0.5%	0.6%	0.8%	0.6%	0.6%
	Other offline booking method	1.3%	0.9%	0.9%	0.8%	0.8%	1.0%
Online Planning Sources	Corporate desktop travel tool/intranet	2.4%	0.5%	0.4%	0.6%		0.9%
	Destination website (official site of state, city or attraction)	9.7%	6.6%	7.8%	10.4%	7.5%	8.1%
	Online travel agency (e.g. Expedia, Travelocity, etc.)	7.2%	3.7%	4.4%	6.0%	1.8%	7.8%
	Travel provider website (e.g. airline, hotel, etc.)	9.0%	7.3%	8.3%	11.0%	4.6%	13.0%
	Some other online booking method	2.5%	3.5%	2.8%	4.0%	0.4%	5.8%
	Someone else booked for me and I don't know the method	6.6%	8.0%	7.6%	10.0%	7.2%	8.1%
	No bookings were made for this destination	45.2%	58.6%	55.7%	41.5%	71.9%	35.1%

Thank You