

International Markets Board Meeting

October 11, 2024

LIFE
UTAH
ELEVATED



Governor's Office of
Economic Opportunity

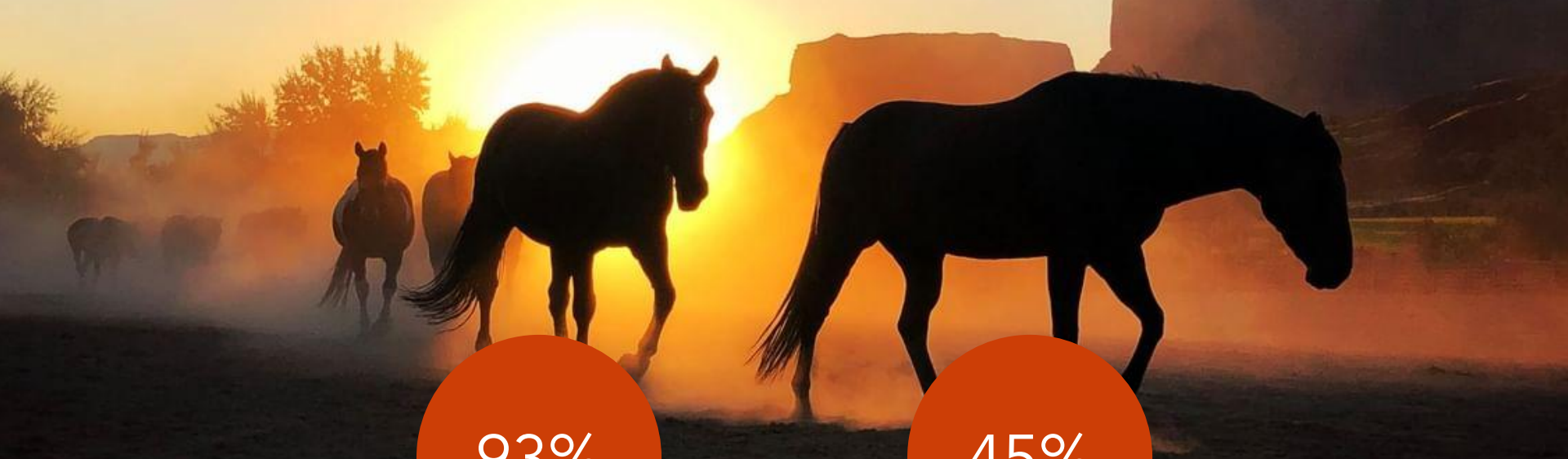
Overview

- Data/Forecasts
- Fiscal Year strategic overview
- Looking ahead



Forecasts

A scenic landscape photograph. On the left, a steep, rocky mountain slope descends towards a valley. The valley floor is covered in green vegetation and a winding river. A dirt road follows the river's course. In the foreground, a paved road with a guardrail curves through rolling green hills. In the distance, a large body of water is visible between the hills. The sky is clear blue, and a bright sun in the upper right corner creates a strong lens flare effect.



93%

Forecasted Spend

Visitor spending total
international 2023 to 2028

45%

Forecasted Visits

Visit total International
2023 to 2028

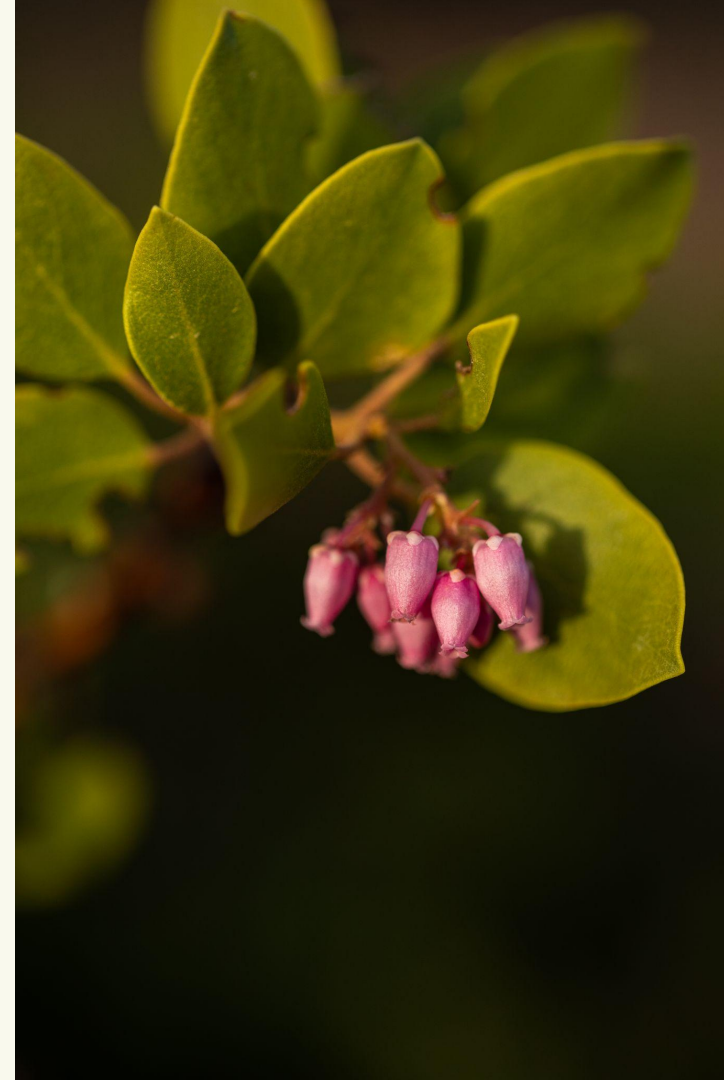
Tourism Economics 2028

Visitor Spending

Spend in Utah overtime

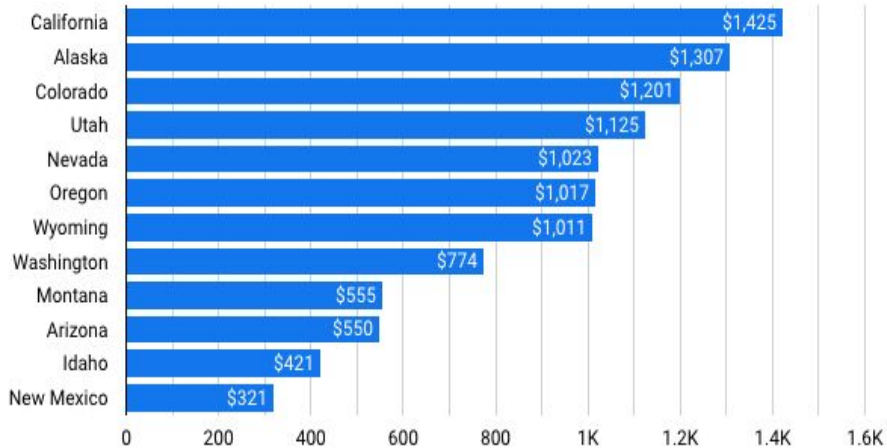


*All forecasted data is subject to change.



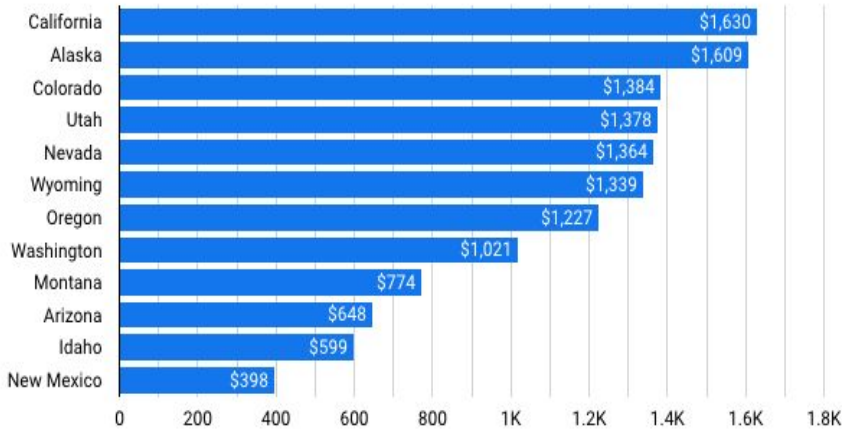
Tourism Economics: 2023 vs. 2028

Spend per Visitor in Competitor States



2023 Average Spend per Visit
\$1,125

Spend per Visitor in Competitor States



2028 Average Spend per Visit
\$1,378

The image is a full-page background photograph of a desert landscape. In the foreground, there are large, rounded, reddish-brown rock formations. Scattered across the slopes and plateaus are numerous green pine trees. The middle ground shows a wide, flat valley with patches of green and brown, leading to distant, hazy mountains. The sky is filled with heavy, grey clouds, creating a dramatic atmosphere. The text "Fiscal Year Annual Plan" is centered in the middle of the image in a white, serif font.

Fiscal Year Annual Plan

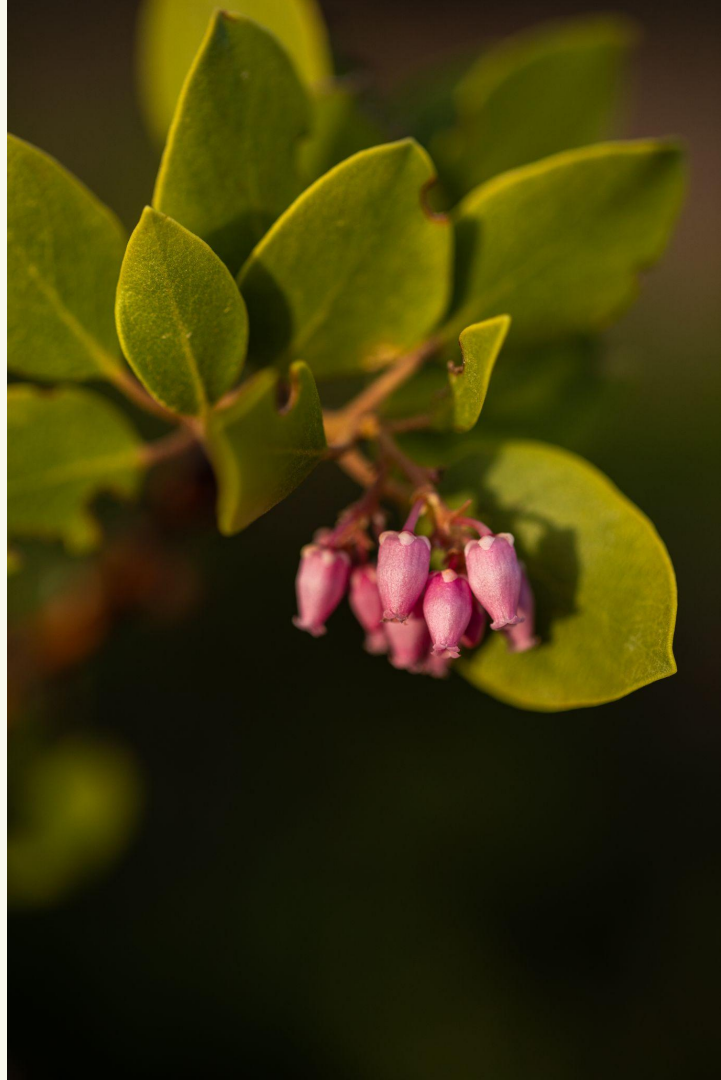
Red Emerald Strategic Priorities: International

1. Increase Utah's share of Focused global Markets. (Prioritize Visitation, Distribute Visitation)
2. Increase awareness & consideration of Utah as an exceptional outdoor vacation destination. (Continue Powerful Branding).
3. Educate visitors on responsible and prepared travel practices. (Prioritize Quality Visitation, Distribute Visitation)

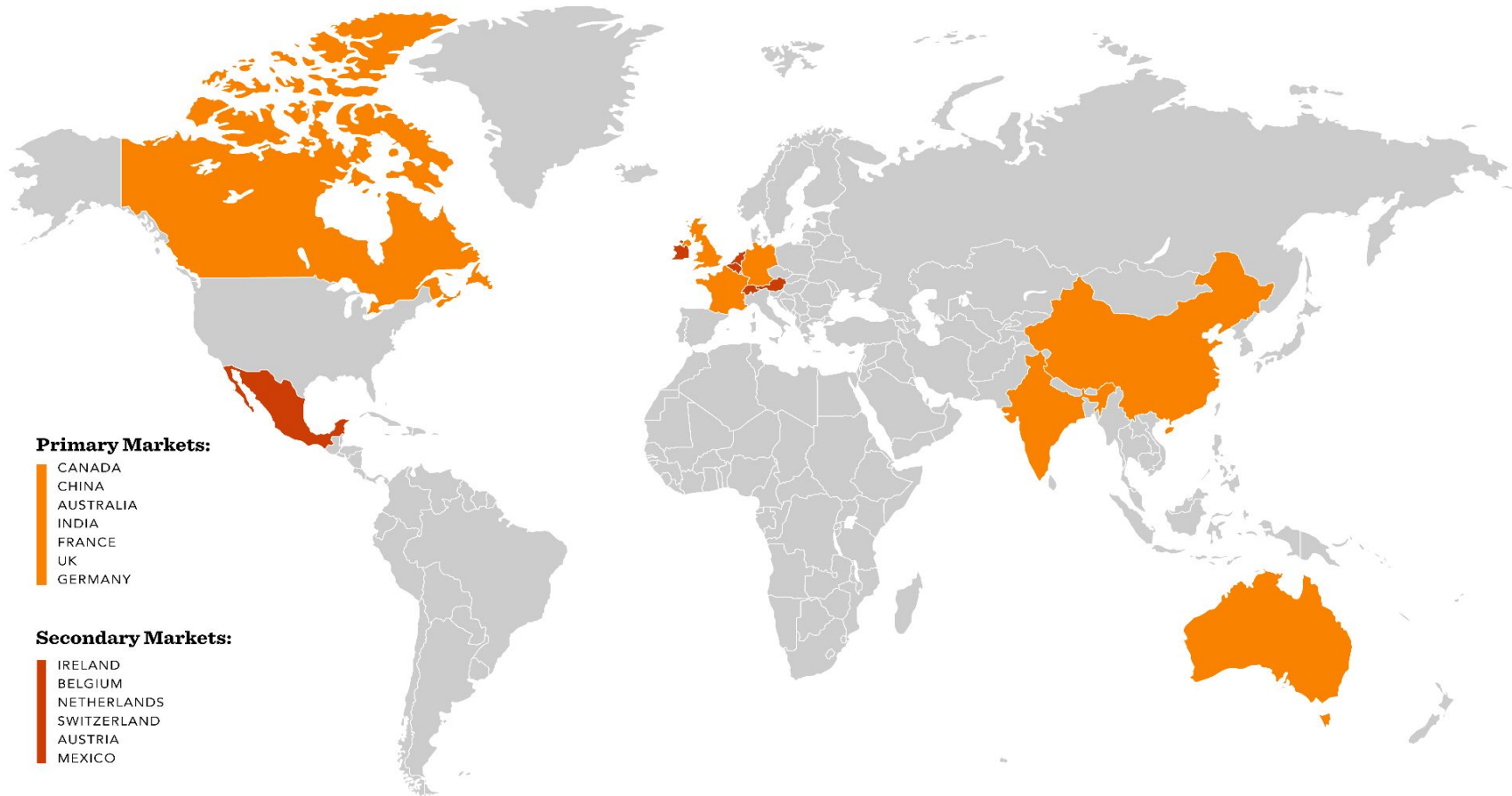


Fiscal Year '25 Goals

- Increase length of stay and visitor spending.
(Prioritize visitation/distribute visitation)
- Maximize ROI and create avenues for international marketing for stakeholders. (Continue powerful branding)



Inbound markets of focus



Travel Trade

1

Tour Operators,
Agents, Wholesalers,
Inbound Operators

Consumer

2

Online Travel Agencies
(OTAs), Social Media,
Out of Home (OOH),
Consumer Activations,
Brand USA, etc.

PR/Media

3

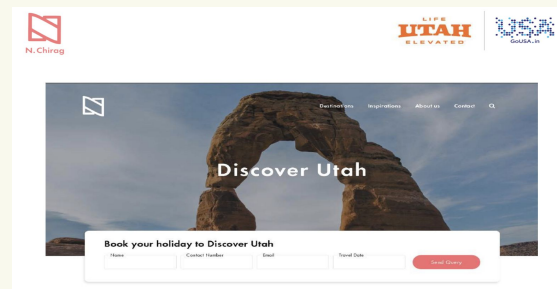
Journalists, freelancers
media companies,
print, online, etc.

Travel Trade

We work with the travel trade to increase ROI to reach targeted audiences.

Key Tactics:

- Cooperative marketing campaigns with qualifying trade partners.
 - Partner cooperative marketing integration
- Education:
 - B2b agent training program content updates, adding Spanish
 - Webinars/in person training/improved digital tools and resources
 - Market Readiness: RTO training and campaigns
- Strategic partnerships/multi-state partnerships
- FY25 Highlights: Tree Utah (Comptoir & America Unlimited), Expanded work in the Benelux Region. Partner Opt-ins including virtual agent training, wholesaler campaigns, travel trade media campaigns, tour operator cooperative marketing, GDS (B2B agent campaigns)



Consumer Awareness

We work on brand awareness and consumer engagement via targeted campaigns, and leveraging resources.

Key Tactics:

- Include CTA partners in marketing efforts
- Utilize brand partnerships to reach targeted audiences
- Leverage Brand USA for additional funding, visibility and to maximize ROI/Leverage Love Comm
- Partner cooperative marketing
- FY25 Highlights: paid social media expansion and international landing page improvements. Partner Opt-ins including Challenges paid media, Conde Nast paid media, Reisen Exclusiv paid media, Expedia GSOE and road trips campaign.

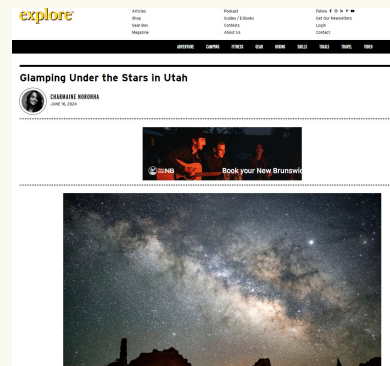


Public Relations

We leverage earned media coverage in print and online publications to increase high-level awareness of Utah to international audiences.

Key Tactics:

- Monthly headline pitches/collaboration with J/PR
- Canada Media Mission
- 25-30 Individual Media Visits (IMV).
- Ongoing communication support/newsletters
- IMM Australia and other media shows
- IPW Press Conference/Travel Week Media Marketplace
- FY25 IMV Highlights: Ensemble publication, Culture Trip, Hockey writer/Sports Writer, Toronto Globe & Mail, Mountain Life Media, Ski Canada.



**FY24 EMV across all markets:
\$11,345,310**

FY25 Efforts

- Nordic Expansion and Brand USA Travel Week (October 21-24)
- Benelux onboarding and mission. (November 3-8)
 - Southern Region of France (Region Sud LOI: continued efforts)
- Expanded work in Mexico: launch of agent training in Spanish
- IITA pre/post FAMS
- Incheon/Seoul to SLC Direct flight launch (June 12, 2025)



Marketing Updates

Ben Cook, Director of Marketing & Communications
Utah Office of Tourism



Overall Marketing Goal

Primary Goal:

Enhance the economic impact of leisure travel in Utah.

Secondary Goal:

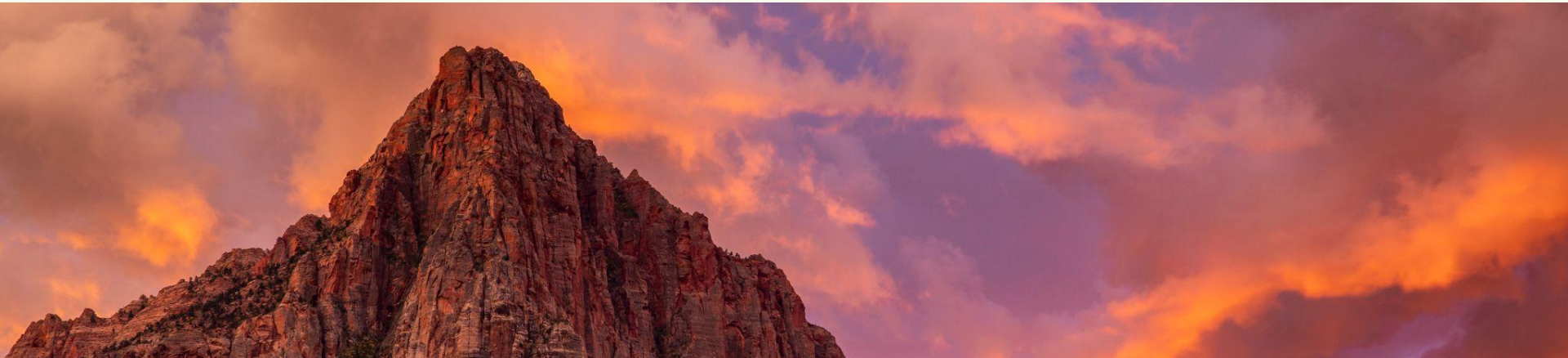
Strengthen Utah Travel Brand Associations.

(Life Elevated, M5, GSOE)



Strategic Initiatives

- 1) **Inspire awareness and interest in Utah travel.**
(Continue Powerful Branding)
- 2) **Increase visitor length of stay and spend.**
(Prioritize Quality Visitation, Distribute Visitation)
- 3) **Encourage visitor planning and preparation.**
(Prioritize Quality Visitation, Distribute Visitation)



3 Core Advertising Campaigns



Parks & Beyond

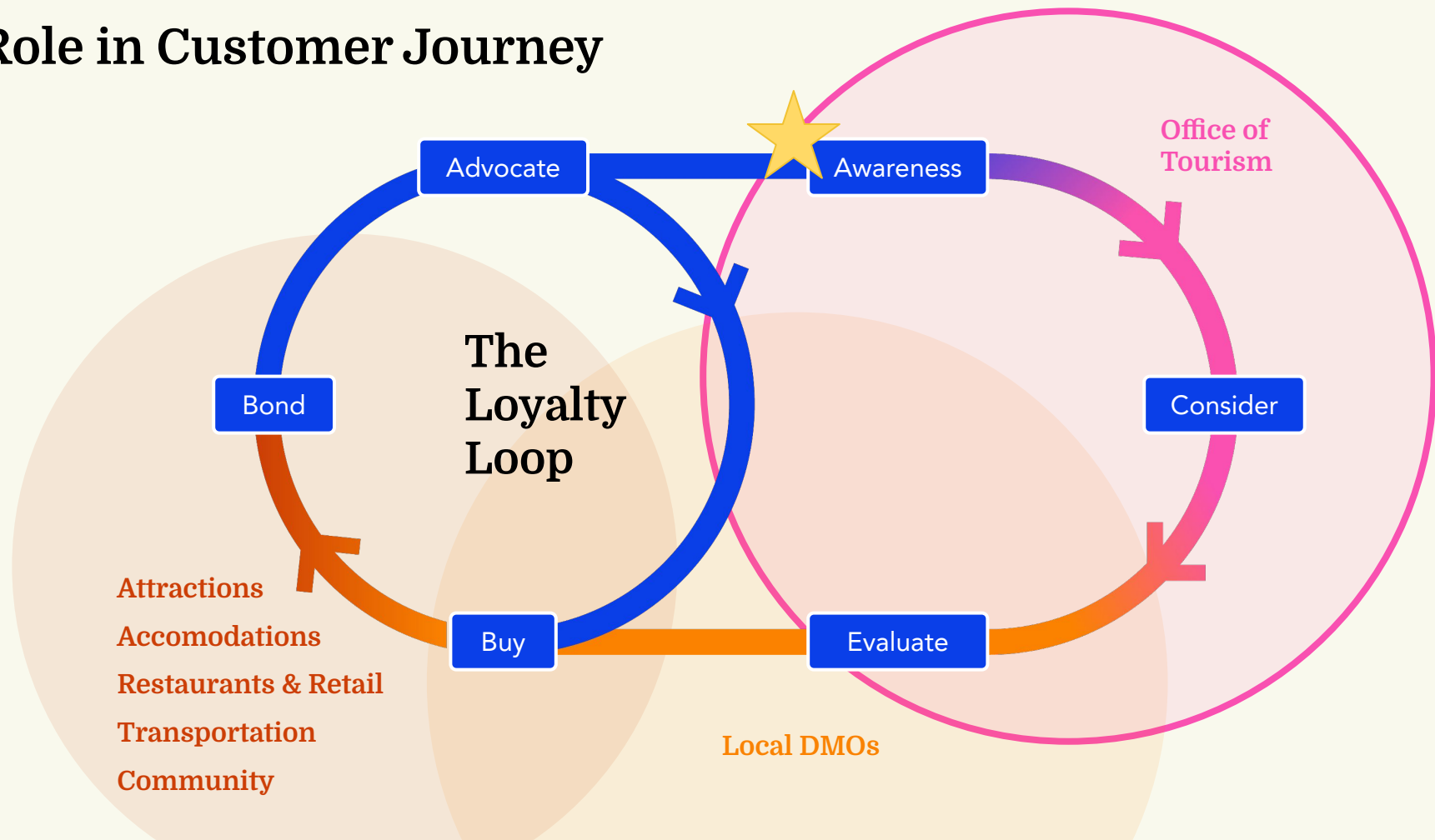


Ski & Winter



Urban & Outdoors

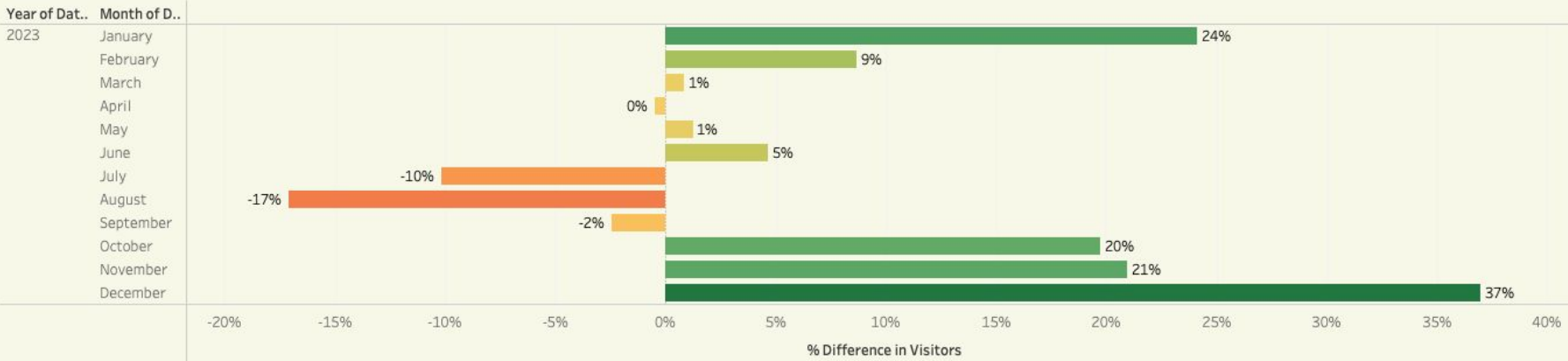
Role in Customer Journey



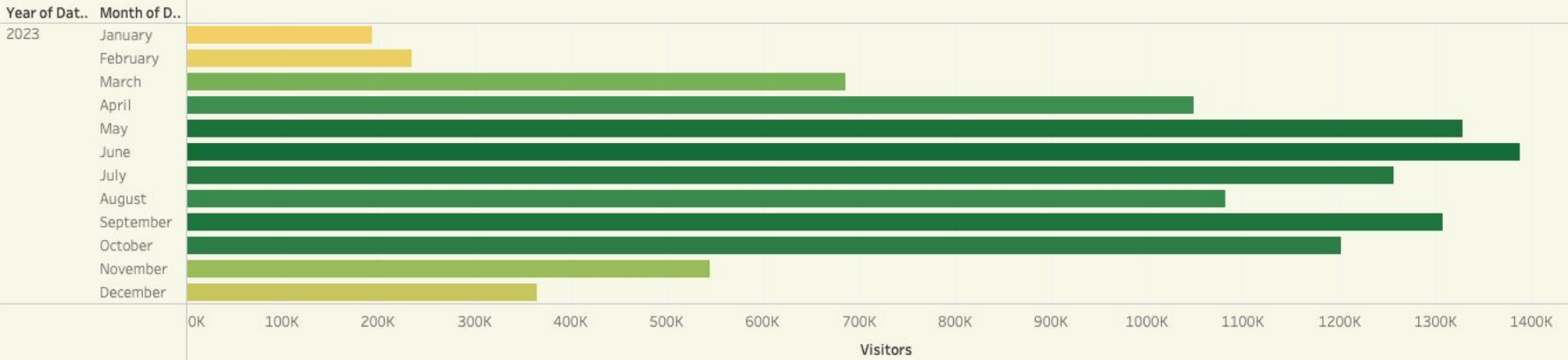
Parks & Beyond - Winter Campaign Plan



Monthly Growth in National Park Visitation 2017-2023



Monthly National Park Visitation



Strategy

Campaign Goals

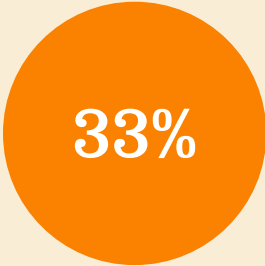
1. Inspire awareness and interest in a trip to our national and state parks in the winter.
2. Increase winter visitors' average length of stay and spend per trip.
3. Educate visitors on responsible and prepared travel practices.



Key Performance Indicators (KPIs)

Inspiration | Planning

Brand Awareness



Maintain awareness of
Mighty 5

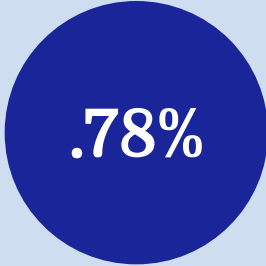
Impressions & Engagement



Maintain impressions &
Increase engagement
time

Likely to Book | In Market

Post Impression Rate



Measure &
Optimize on
PIR

Length of Stay & Spend



Grow % lift among
ad-exposed
audiences

Audience Mix

Regionally focused, interest & behavioral based targeting



EXPLORERS

A25-54 | HHI \$50K+
No gender lean

Curious adventurers, seeking to explore and discover their world. A desire to visit state and national parks influences their destination selection, but they're open to off-the-beaten-path adventures as well.

ACHIEVERS

A18-24 | HHI \$50k+ Lean male

Similar to our core Explorers, but seek more intense adventures that include rigorous outdoor recreation, physical challenge, and personal achievement.

FAMILIES

A35-54 | HHI \$100K+ | No gender lean

Parents wanting to introduce their children to new and transformative adventures, with varying degrees of intensity and physicality. They seek unique and memorable ways to strengthen and build lasting bonds.

SECONDARY

Parks and Beyond Custom Audiences:

National Park Visitors

Southern Utah Visitors

Southern Utah National Park

All with past visits during winter months.

Creative



Key Messaging & Themes

- Love & Connection - *In Love, In Utah* (Primary Emotional Message)
- Breathtaking Scenery & The Mighty 5® (Primary Product Message)
- Vacation Nostalgia & “Coming Back”
- Deeper exploration of things they love—the location, the activities, etc.
- Balance of relaxation and challenge
- A contrasts of colors, climates, landscapes, activities, moods (relaxation & challenge)
- Planning & Preparation (Forever Mighty®)



CAMPAIGN KEY MESSAGING

Love & Connection



In Love. In Utah.

Wintertime offers a new opportunity for connection, awakening, and adventure.

From incredible visual contrasts to diversity in geography, temperatures, and activities, the cooler season welcomes visitors to experience Utah's parks and beyond in an entirely new way.



Secondary Messages

1. Increased Contrasts—Although Utah's striking landscapes come to mind first, in wintertime there are heightened contrasts in activities from high-adventures like snowshoeing, canyoneering, and biking to restorative exploration like scenic hikes, photo-tourism, and warm weather escapes.
2. Change of Pace—Exploring our parks and beyond is a great way to escape cabin fever, cloudy days, and wintertime blues. The warmth of the desert, brilliant blue skies, and wide open spaces wait to welcome visitors hoping to break free from winter's daily monotony.
3. Forever Mighty®—It's always important to plan and prepare for one's best experience, and in wintertime especially. Travelers need to understand how to be ready for changing weather conditions, reduced accommodations, possible road closures, and more, both for their own safety, and also to help us keep Utah Forever Mighty®.
4. Visit Like a Local—"Like a local" content leveraging our SU cities, National Park names, and The Mighty 5 performed well last year. Let's continue to expand upon the compelling reasons to visit SU in the off-season and support local businesses at the same time.

New 2025 Video Test

An additional :15 asset that features a new music track and alternate winter clips.

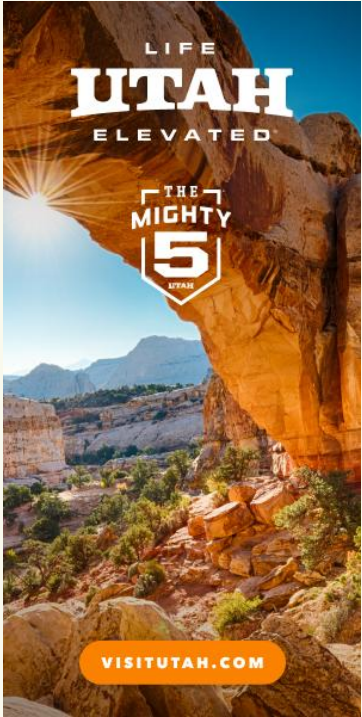
- Testing the hypothesis that music, especially across several assets, may be subject to quicker creative fatigue.
- Pending performance, we could incorporate new music into the Spring campaign.



"Winter Energy"

[Anywhere I go]
[you're always in my heart]
[anywhere I travel]
[we're never far apart]

New 2025 Display Banners



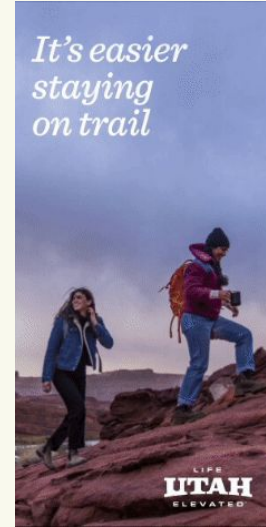
New 2025 Display Banners



Continuing Display Banners



Awareness



Preparedness



Paid Media



Media Campaign

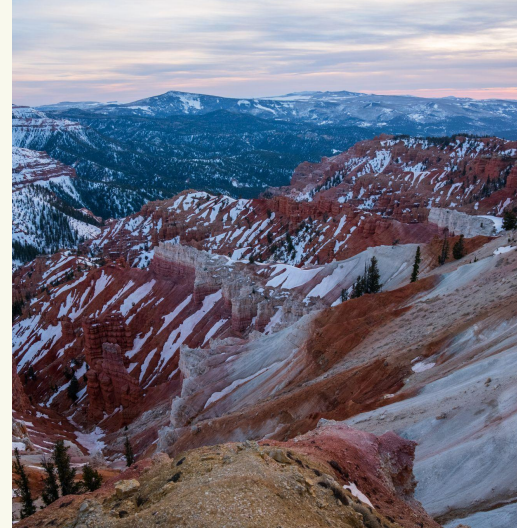
Budget

\$650,000

Campaign Flight

10/01/2024 to 1/30/2025

Regional emphasis, with national targeting in endemic partnerships



Opportunities

- **Integrate New, Top Performing Vendor**

InPowered's success with other campaigns can be leveraged for this year's campaign.

- **Previous Top Performers**

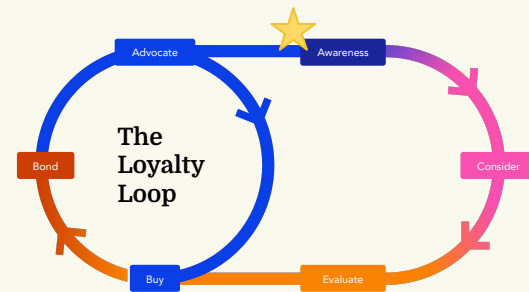
Capitalize on the success from last year by bringing back top performing vendors.

- **Testing in Progress**

To save costs, we are conducting a 30 day test without audience sharing for social. Will evaluate after test period.



Campaign Breakout



Awareness
Inspiration

30%

VIANT.



storygize

Consider
Planning

30%



storygize

Evaluate
Likely To Book

25%



Bond
*Confirmed &
In-Market*

15%



storygize

*Flexibility to adjusted based on market demand.

Media Flow

[illegible]

Budget Comparison

Media	23/24	24/25
Programmatic	\$123,000	\$120,000
Connected TV	\$188,000	\$195,000
Endemic	\$217,000	\$195,000
Native	\$143,000	\$120,000
Ad Serving	\$12,000	\$20,000
Total	\$683,000	\$650,000



EDA ARPA Destination Development Grant

GAP Overview

LIFE
UTAH
ELEVATED™



Governor's Office of
Economic Opportunity

Funding Agency

Economic Development Agency
(EDA)

Grant:

American Rescue Plan Act

Total Amount Awarded:

\$3.8M

Purpose:

To help the tourism industry build
economic resiliency in a
post-pandemic world

Award Recipient

State of Utah (*Utah Office of Tourism*)

7 Major Development Projects:

- Niche Audience Studies
- Responsible Visitation Messaging
- Sentiment Survey Series
- Subgrants
- Tourism Exchange
- Tourism Resiliency Training
- Utah Film Trail

Subgrants

Types:

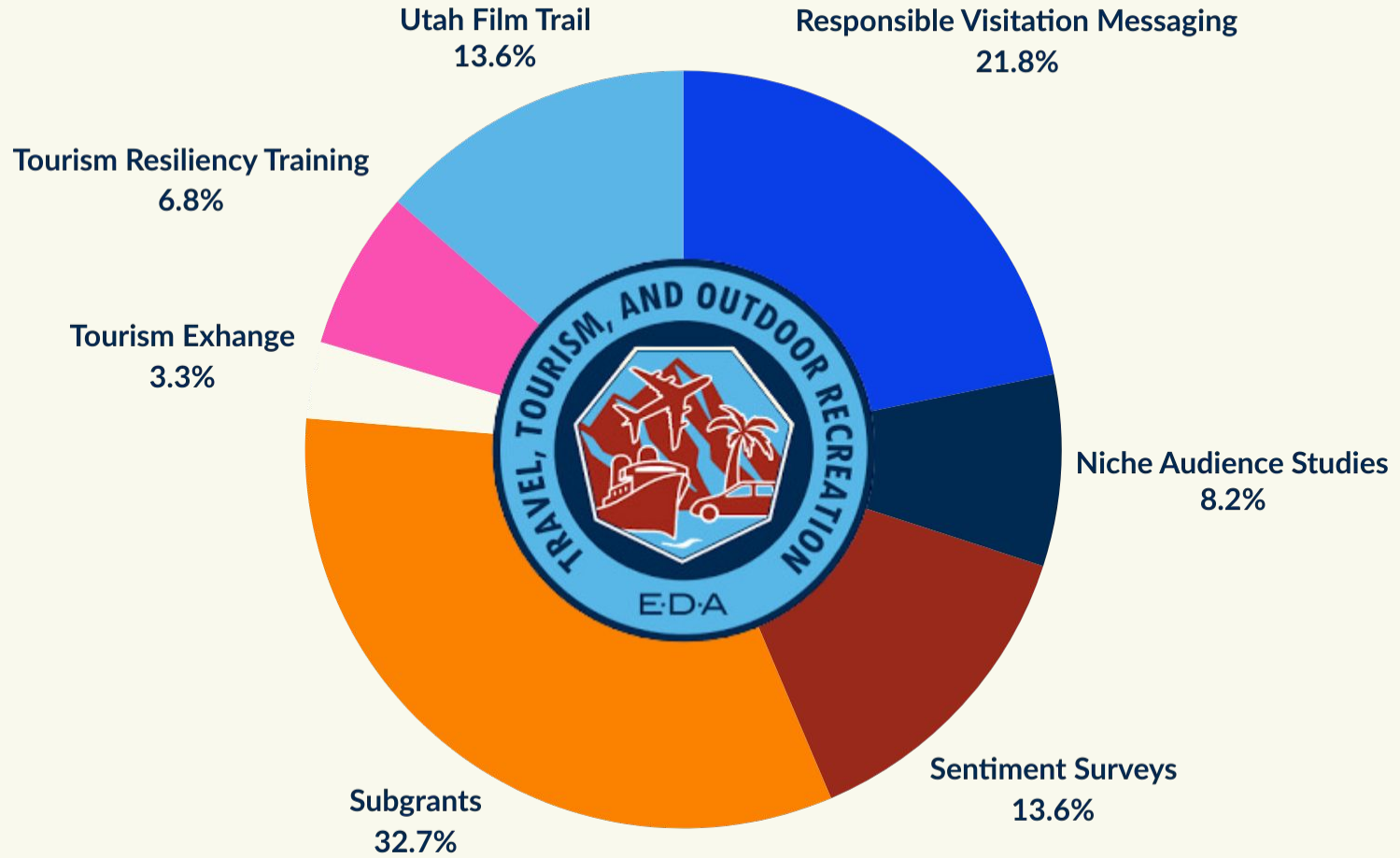
- Feasibility & Economic Impact Studies
- Implementation Projects
- Product Development Studios

Round 1: 4 Subgrantees

Round 2: 27 Subgrantees

Total Subgrantees: *Potentially 32*

EDA ARPA Breakdown





Subgrants

Feasibility & Economic Impact Studies, Implementation Grant, & Product Development Studios



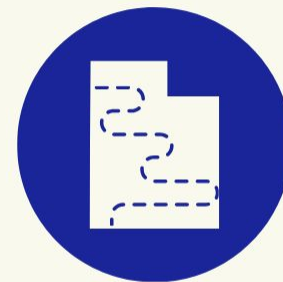
Niche Audience Studies

Market research conducted to identify five niche travel audiences



Sentiment Surveys

Used to identify the impact of tourism on communities, visitors, & industry stakeholders



Utah Film Trail

Creation & promotion of markers for many significant film locations throughout Utah



Responsible Visitation Messaging

Creation of key messaging aimed at visitors and residents to protect tourism resources



Tourism Exchange

Technology platform that connects Utah suppliers to a global B2B distribution system



Tourism Resiliency Trainings

Training opportunities for the industry including agritourism and astrotourism events