



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



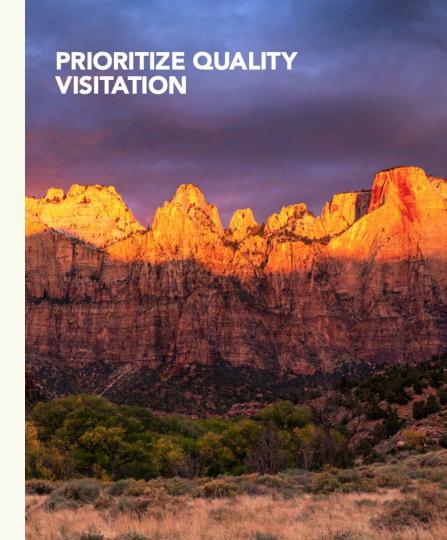
Tourism Resiliency Trainings

Training opportunities for the industry including agritourism and astrotourism events

Strategic Plan

Prioritize Quality Visitation

- Develop campaigns tailored to emerging niche audiences and experiences
- Evaluate opportunities and impacts of increasing focus on targeted international markets
- Be an industry leader in responsible visitation education and messaging (e.g. Forever Mighty)





What's next?

Be an industry leader in responsible visitation education and messaging

Critical challenges

- Low consumer brand awareness
- Consumers felt the tagline is not uniquely suited to Utah
- 40% of stakeholders feel that Forever Mighty does not fit their community
- Residents need these messages as well

Recommendations

- "Forever" is universally appealing and understood
- Consider removing "Mighty"
- Putting Utah in the tagline would strengthen the states connection.





Introduction

The quality visitation initiative aims to establish Utah as an industry leader in responsible visitation education and messaging. In partnership with stakeholders, we want to develop and strengthen responsible visitation and stewardship messaging across all audiences.

In doing so, we can amplify the effects to better serve Utah communities.

WHY? - Goals

Overarching

Educate and inspire people to change behaviors

- Responsible Visitation
- Public Lands Stewardship
- Preparedness
- Community Engagement

Tourism

Travelers feel welcomed, valued, and prepared



Utah Office of Tourism

Ongoing

Evolution

Integration

Focus

Statewide Effort

OR Strategic Plan

Perceptions of effectiveness

Interest from stakeholders

In State Campaign

One time project

EDA funding

Residents as the primary audience

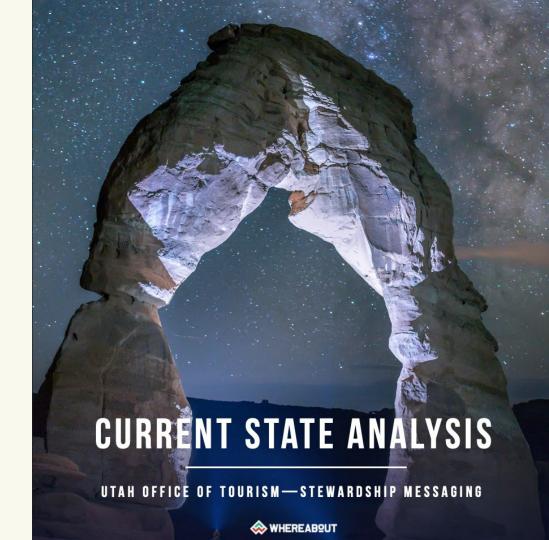
Strategy Development Resource Development Next Steps Discovery

Current State Analysis Report

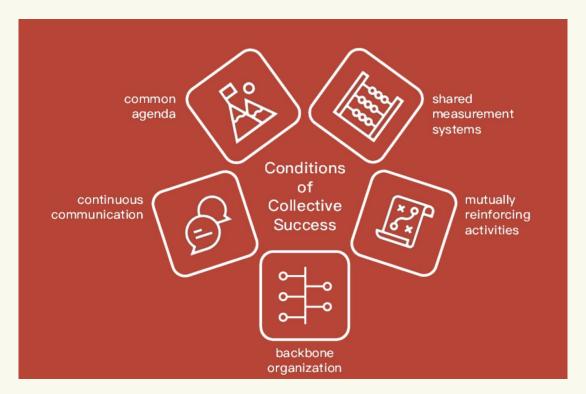
Reviewed existing data sources and documents, held Town Halls, launched an industry survey, and met with three internal teams.

Nine Strategic Considerations

- 1. Identify the Grand Unifying Message
- 2. Employ Universal Messaging
- 3. Start at Home
- 4. Empower Community-Led Messaging
- 5. Instill a Sense of Ownership
- 6. Communicate Public Lands Stewardship
- 7. Reinforce Safe Behaviors
- 8. Foster Interpersonal Respect
- 9. Connect Visitation to Vitality for Utah



Collective Impact Model



Collective Impact is a structured approach to addressing complex issues through aligning a portion of the work of multiple organizations toward accomplishing shared goals.

Council Members

Cassity Bromley, Capitol Reef National Park, representing the National Parks Service

Nancy Brunswick, US Forest Service, representing the US Forest Service

Jacob Crane, Division of Indian Affairs Tribal Relations, representing Tribes

Jason Curry, DOR, representing Outdoor Recreation

Steve Evers, Friends of Arches and Canyonlands, representing parks Non-profit organizations

Evan Glenn, BLM, representing BLM

Dillon Hoyt, PLPCO, representing public land management

Falyn Owens, UADMO, representing Destination Management Organizations

Graydon Pearson, Generation Hospitality Group, representing Hotels and Lodging

Nathan Rafferty, Ski Utah, representing Snow/Ski recreation

Natalie Randall, Utah Office of Tourism

Celina Sinclair, UTIA, representing the Tourism Industry

Devan Chavez, State Parks, representing State Parks

Jerry Taylor, UAC, representing Local governments

Stewardship Messaging Framework

What is it?

- Unified strategy designed to align all stakeholders
- It provides clear, adaptable messaging that promotes:
 - Responsible Visitation
 - Public Lands Stewardship
 - Preparedness
 - Community Engagement

Why is it important?

A cohesive stewardship message will help preserve the Utah experience for future generations while fostering a sense of pride and ownership among all who call Utah home or visit its remarkable destinations.



Grand Unifying Message

A succinct container that not only encapsulates everything but also becomes a rallying cry that residents, industry partners, and visitors all resonate with and can see themselves contributing to.

Goals

Embraced by stakeholders

Understood by consumers

Considerations

Shared sense of Utah identity

Serves the other 8 strategic considerations

Strategic Objectives & Core Messaging Pillars

Encourage Public Lands Stewardship

Environmental and Cultural Preservation, Responsible Exploration

Foster Interpersonal Respect

Respect others and the communities you are visiting

Connect Visitation to Vitality for Utah

Economic and Social Impact

Reinforce Safe Behaviors

Visitor Preparedness & Safety

Instill Personal Ownership

Connect the pride that residents feel as members of their community to the visitor experience and safeguard it for the future

Understanding our Audiences as Stewards



At the heart of this framework is the belief that everyone who experiences, promotes or takes care of Utah plays a role in its long-term well-being. Whether you're a traveler discovering a new trail, a local welcoming travelers to your community, or a partner delivering frontline hospitality or policy leadership – you are a Steward of Utah.

This framework uses the term "Stewards" as an umbrella identity that encompasses Travelers, Locals, and Partners. Each group brings a unique perspective and responsibility to sustaining Utah's environment, culture and communities, and therefore has distinctive key messaging needs and audience sub-groups to consider.

Utah Forever is a call to action around one mission — preserve the natural beauty, vibrant culture and unique traditions that make the state so special.



Strategic Objectives & Core Messaging Pillars

U

Unite For Utah

The stewardship
messaging will be more
effective and more readily
adopted if it feels like an
invitation to be a part of a
community of caring for
Utah, providing
participants a sense of
shared ownership.

Treat the State Like it's Yours

Guiding individuals toward ways they can care for Utah's environment will help preserve these treasures for future generations.

A

Always Adventure Safe

By planning ahead and preparing thoughtfully, people can stay safe and set themselves up for the best experience possible.

H

Honor Local Cultures

Effective messaging will help travelers engage with residents and the multifaceted cultural heritage of Utah respectfully, while also supporting locals as they welcome travelers to their communities.



Deliverables

- Rollout communication strategy
- Messaging framework
- Messaging
 - Ethos & Guide
 - Talking Points
 - Lexicon & Guide
 - Messaging Examples
- Community engagement resources
 - Stakeholder pledge
 - Recommendations

Find these resources on our <u>test page</u>

Messaging Lexicon

Unite For Utah

Business

Community

Connection

Contribution

Economy

Endurina

Neighbor

Support

Vibrant

Visit

Vital

Welcome

Treat the State Like it's Yours

Care

Ethic

Learn

Preserve

Proud

Protect

Show

Steward

Teach

Always Adventure Safe

Equip

Knowledge

Landscape

Prepare

Quality

Ready

Respect

Safe

Trip

Weather

Honor Local
Cultures

Culture

Experience

Heritage

Listen

Pioneer

Respect

Tradition

Jnderstand

Unique

Stakeholder Stewardship Pledge

Targeted to community leaders, businesses, and stewards of Utah's future

I believe in a Utah that lasts – beautiful, vibrant, and welcoming for generations to come.



That's why I pledge to:

Unite with fellow leaders and organizations who care for this place, and actively champion stewardship in my community

Treat Utah like it's mine to take care of – modeling pride, care, and responsible use in everything I do

Always prepare myself and my team to explore safely and respectfully, and to help others do the same

Honor the cultures, people, and traditions that make Utah unique – and ensure those stories are shared and respected

Together, through our leadership and example, we shape the legacy of Utah Forever.

Next steps

Roll out and Communication

- Industry launch at UTC
- Other government agency coordination
- Ongoing communication and feedback

UOT Team

- Implementation of the framework
- In State campaign

Board Members

- Review the resources on Travel.Utah.Gov <u>test page</u>
- Take the pledge





Meet the Team



Camille Johnson
Community & Partner Relations
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Rachel Creer
Partner Resources Manager
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Michelle Evans Grants Specialist michelleevans@utah.gov

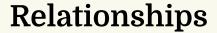


Laici Shumway
Partner Outreach & Collaboration
Coordinator
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Diane WilsonAdministrative Assistant
<u>dianew@utah.gov</u>





Establish & maintain collaborative relationships with industry partners and key stakeholders.



Resources

Provide resources for industry partners that promote and develop enduring, resilient destinations.



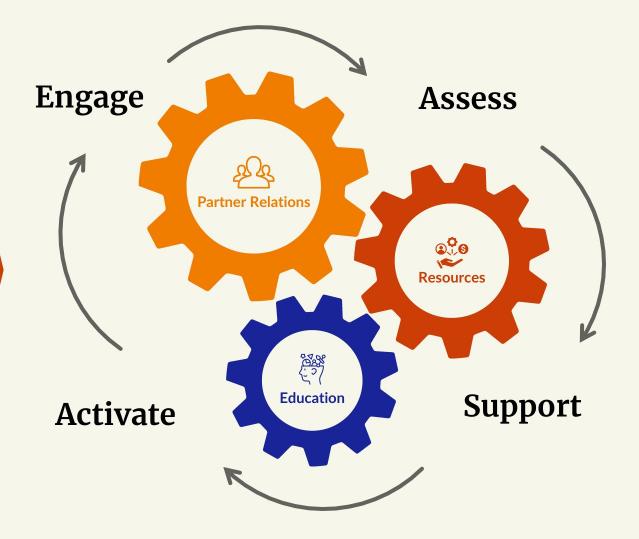
Education

Empower and inspire local stakeholders to leverage resources— enabling them to achieve their goals and optimize their tourism economy.

"3 Gear" Process

Community & Partner Relations









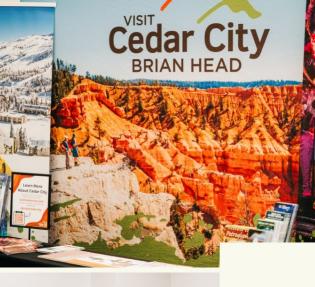


TOURISM

Business Development

Workshop

AGRITOURISM & ASTROTOURISM







August 11th - 12th













Content

Community-Led -The 2024 DMO Survey showed high interest throughout the state in developing agritourism & astrotourism.

Location

Cedar City -The 2024 Partner Tours and community-led content selection helped in determining the Workshop location.

Purpose

Resiliency - Increase industry capacity, ROI, and visitor disbursement through agritourism, astrotourism, and general product development.



Primary Sponsor



Workshop Host



Supporting Partners















Government Sector

Included several county and economic development offices as well as national & state parks.

Tourism & Hospitality

Largest Category - Included a wide range of private enterprise, ranging from small, niche operations to larger resorts and accommodation providers.

Educational & Non-Profits

Included representation from SUU and USU as well as various non-profits.











The Ripple Effect of Utah's Visitor Economy

Natalie Randall (Utah Office of Tourism) & Marc Brown (University of Utah)



Beyond the Demographics: How Strategic Audience Research Transforms Marketing Targeting

BeAnne Sahleen (Love Communications)



Events, The Art of Awe: Creating Magic in Every Moment

President Mindy Benson & Kenten Pope (Southern Utah University)



More Than Just a Pitch

Tyler Stillman (Southern Utah University)





Product Development (n.)

the process of creating or improving a tourism experience and managing it during all stages from design through marketing

- (1) Plan, Fund, Flourish: The Essentials for New Tourism Businesses
- (2) Marketing Tips for Small Businesses on a Budget
- (3) Unlocking International Tourism
- (4) Event Planning: Transforming Ideas into Unforgettable Experiences
- (5) Next-Level Business Planning









Rachel Creer Utah Office of Tourism



Caroline Hargraves Utah Dept. of Agriculture & Food



Adrianna Franco Utah Dept. of Agriculture & Food



Natalie Kane Utah Dept. of Agriculture & Food



Terry Camp Utah Farm Bureau



Beckah Esplin Utah State University



Sherrie Staheli Staheli Family Farm



Carly Coyle Dendric Estate



Loretta Clayson Journey Farm





Laici Shumway Utah Office of Tourism



Lisa Stoner Utah State University



Diana Davidson Business Owners of Bluff



Ben Muhlestein Blanding City







Agritourism (n.)

the combination of agricultural production with tourism to attract participants from the general public to an agricultural enterprise for the entertainment, recreation, or education of the participants

- (1) Rooted in Resources: A Guide to Utah Agritourism Tools
- (2) Shielding Your Success: Understanding Agritourism Liability and Insurance
- (3) Synergy in Agritourism: Multiplying Success Through Partnerships
- (4) Understanding Local Regulations: Zoning & Permits for Your Agritourism Business
- (5) Sowing Interest: Targeting Strategies for Utah Agritourism

Astrotourism (n.)

tourism-related activities that involve or relate to the viewing of celestial objects and events, particularly night sky experiences

- (1) Beyond the Horizon: Getting Started with Astrotourism
- (2) Your Place in the Stars: How Astrotourism Fits in Your Community
- (3) Your Path to Dark Sky Designation: Benefits, Feasibility, and Steps
- (4) Illuminating Your Audience: Targeting Strategies for Utah Astrotourism
- (5) Bright Ideas for Dark Skies: Crafting Immersive Astrotourism



Dark Sky Designation: Feasibility, & Step















Host

Visit Cedar City • Brian Head -Responsible for overall event support and the coordination of the hands-on experience component of the Workshop.

Partners

Frontier Homestead State Park Museum - Agritourism/dinner host location.

Iron Springs Resort Astrotourism/stargazing host location.

Purpose

Hands-On Learning - Provide Workshop attendees with an opportunity to experience agritourism and astrotourism; educate and inspire product development through personal interaction.













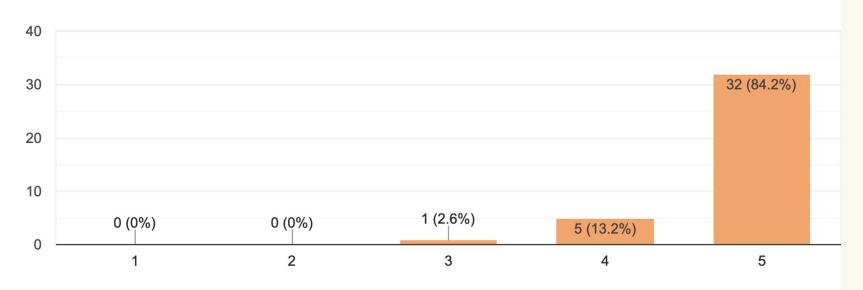








How likely are you to participate in other events produced by the Utah Office of Tourism? 38 responses













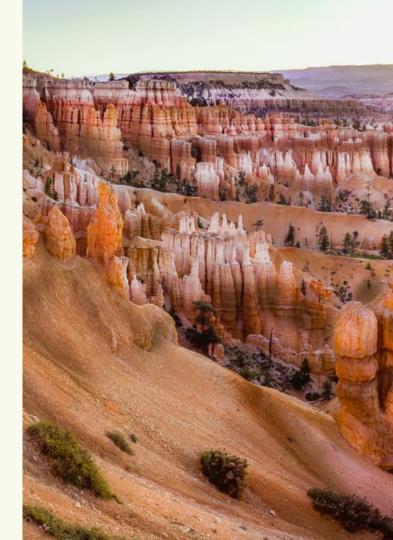


Utah Tourism Conference

Powered by Utah Tourism Industry Association

JOIN US IN BRYCE CANYON COUNTRY

SEPTEMBER 30 - OCTOBER 3, 2025







State of the industry

- Geopolitical friction around trade
 - High visibility border and security immigration enforcement has created uncertainty for travel to the US.
- Trade Wars
 - We are navigating negative sentiment about the US.
- Visa obstacles
 - Visa wait times remain long in some markets
- Increased costs
 - The costs for flights, hotels, rental cars and other expenses have increased. Compared to other countries, such as Canada and many in Europe, the US is generally more expensive.
 - o Increased ESTA fees: from \$21-\$40
 - \$250 Visa integrity fees
 - o Increased costs for foreign visitors visiting the National Parks
 - Exchange rates: Still strong, but falling



State of the industry

- Last month, a study from the World Travel & Tourism Council (WTTC) that analyzed the economic impact of tourism in 184 countries revealed the U.S. was the only country forecast to see international visitor spending decline in 2025.
- The WTTC projects the U.S. to be on track to lose \$12.5 billion in international visitor spending this year compared to last year, according to the research.
- It could be argued, however, that the actual losses will be significantly larger, given that Tourism Economics, a division of Oxford Economics, had originally forecasted the U.S. would see a 9% jump in international inbound travel in 2025.
- A 9% increase would have equated to a boost of about \$16.3 billion in revenue for the U.S. economy.
- Instead, Tourism Economics has revised its baseline forecast to a year-over-year decline of 8.2%—a significant 17.2% variance from its original 9% increase.



State of the industry

- Big Beautiful Bill
 - Positive:
 - Advocacy and funding for air traffic control (\$12.5 Billion Proposed)
 - 5,000 Customs and Border Patrol Officers
 - Negative:
 - 80% cuts to Brand USA funding
- Summary of Global Travel Service forecast releases
 - Estimate of international arrivals to US in 2025
 - August 2025: 8.2% decline
 - June 2025: 8.7% decline
 - March 2025: 9.4% decline
 - December 2024: 8.8% growth (9%)
 - June 2024: 13.7% growth (used as input to August 2024 IST release)
- This forecast anticipates a significant 8.2% decline in international visitor arrivals to the US this year, reflecting factors including negative sentiment shifts and uncertainty about immigration and border policies.

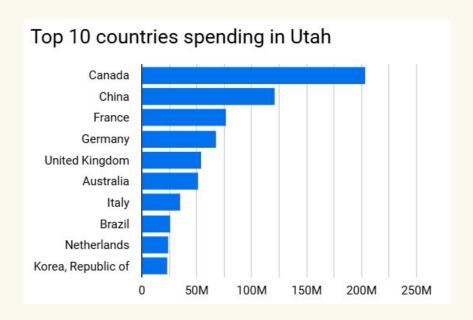


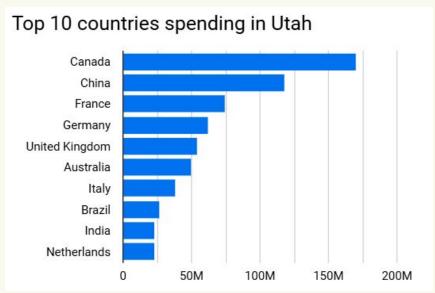
Brand USA

- What does this mean?
 - UOT General Media is no longer available to include in LOA.
 - Brand USA and Miles Marketing will be allowed
 - Brand USA Missions and Travel Week are still happening
 - Staff cuts:
 - Brand USA has laid off 15% if its staff across several departments
 - The agency has shut down GoUSA TV, its ad supported streaming service.
 - Emphasis on new initiatives like the America the Beautiful Campaign.



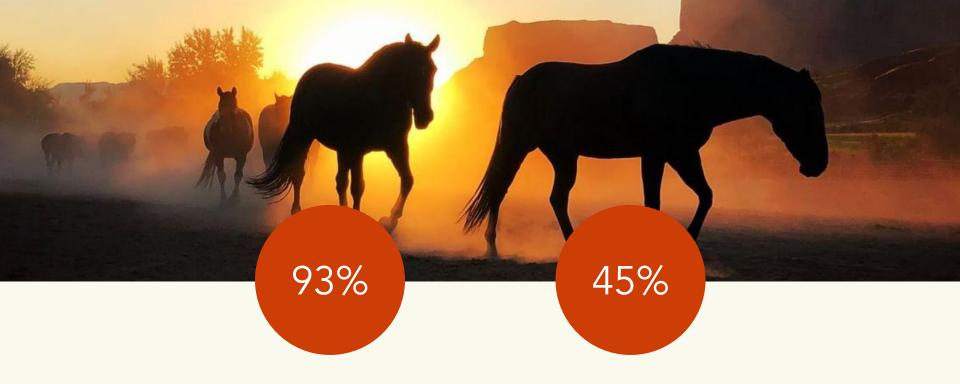
Tourism Economics: Spending 2024 vs. 2025





2024 (Real data)

2025 (Forecasts)



Forecasted Spend

Visitor spending total international 2023 to 2028

Forecasted Visits

Visit total International 2023 to 2028



Forecasted Spend

Visitor spending total international 2019 to 2029 *National: 31%

Forecasted Visits

Visit total International 2019 to 2029 *National: 3%

Source: Oxford Economics / Tourism Economics

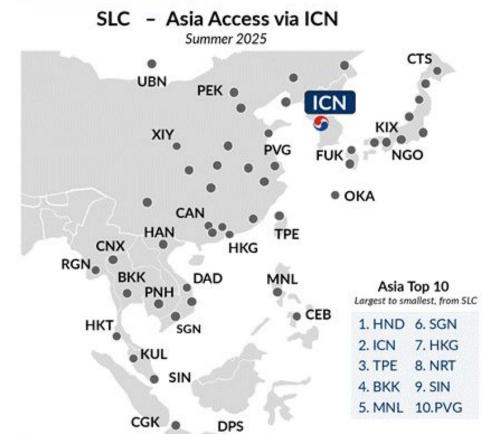
US taking center stage: Golden Age of Travel

- 2026: Route 66 100th anniversary
 - The great American road trip and beyond
- 2026: FIFA World Cup:
 - US host destinations across the country
- 2026: America 250 Celebration:
 - Share what makes America unique-now through July 4,
 2026
- Temple Square Open House: April-October 2027
- 2028: LA Summer Olympics
- 2034: Salt Lake Winter Olympics





First - Ever Nonstop ICN Connects SLC to All Key Asian Destinations



- Delta to launch the first -ever nonstop service from SLC to ICN , its only direct flight to Asia
- New flight optimally SLC demand to Asia ICN hub, including Kong and Singapore
 connects virtually all via our partner KE's Manila, Bangkok, Hong
- SLCICN on Delta's state -of-the-art Airbus 350-900 offers most premium experience
- Opportunity to promote and bring Asian travelers to the iconic nature scenes in Salt Lake City and Rocky Mountain region along with Utah's national parks and deserts



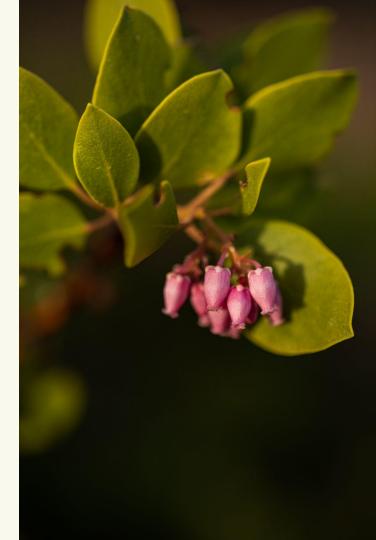
Fiscal Year '26 Goals

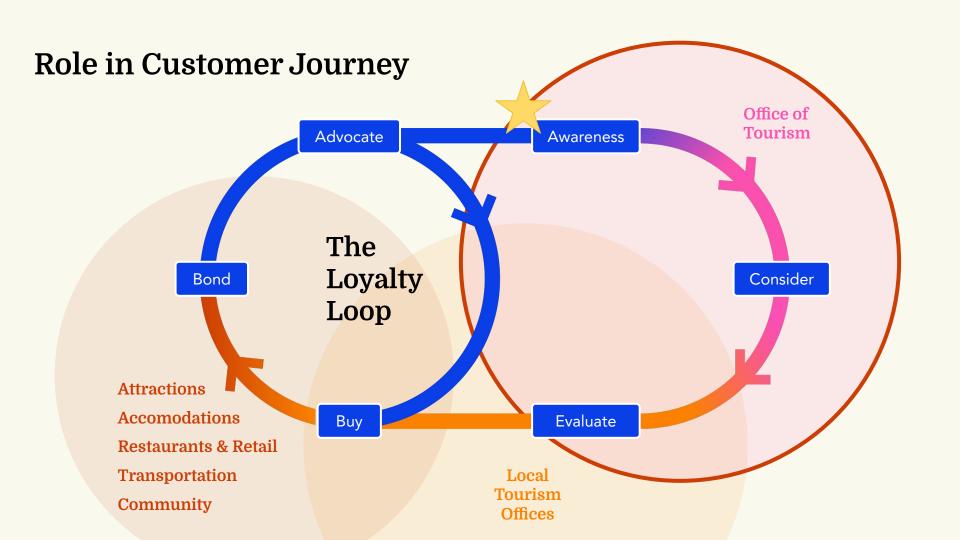
Our primary goal is to attract international visitors who spend more and stay longer.

Concurrently, we aim to increase brand awareness by creating avenues for global marketing engagement statewide, with an emphasis on influencing visitor behaviors, including reinforcing responsible and prepared travel practices.

Strategic Initiatives

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





Travel Trade

Consumer

PR/Media

1

Tour Operators, Agents, Wholesalers, Inbound Operators, etc.

Paid/Earned

2

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

Owned/Paid Shared 3

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

Paid/Earned

Fiscal Year '26 KPIs

- Primary:
 - Increased average spend per visit (6%)
 - Fiscal Year 2025-2026 goal: \$1,270
 - Average spend per visitor/international: \$1,140 (Average spend per visitor/domestic: \$795)
- Secondary:
 - Earned media value (EMV) from targeted publications, as identified at the start of the fiscal year
 - Barcelona Scoring (above 80) for all media placements/direct efforts
 - Product development/quality of product promoted, packaged, and sold (Red Emerald itineraries)
 - Additional room nights in each area and/or increased length of time in Utah (Travel Trade Scoring)
 - International Website traffic: (5%)
 - Driven by new international website localization and campaign drivers with a CTA to the website.
 - Social Media Engagement
 - Measuring success with likes, shares, and video views with targeted audiences





Doing more with less

Our core tactics, in alignment with Brand USA, include promoting the "Great American Road Trip" and family travel, highlighting the unique Americana experiences that define Utah and the Western US.

- Revised our approach to missions:
 - Reverse missions: creating more equity and access to global markets for UT partners and suppliers.
 - Supplier inclusion in these missions, virtual missions and other efforts.
- Regional collaboration with Western States
 - o Product development and trade campaign
 - FAM coordination and support
 - Airline development working group
- Social Media
 - Continued collaboration with domestic social media firm, and international vendor management of paid campaigns
- Travel Trade Education
 - Utah Specialist Academy language translations and 2.0

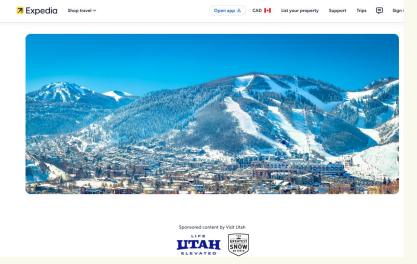




Doing more with less

- Marketing opt-in opportunities for partners that maximize ROI:
 - CAD
 - UOT investment: \$38,000
 - Regional partner investment: \$120,000 (12 regional partners from all parts of the state)
 - Media/wholesale/OTA negotiated matching funds: \$334,200
 - o AU
 - UOT investment: \$84,500
 - Regional partner investment: \$120,100
 - Media/wholesale/OTA negotiated matching

funds: \$372,250





Utah is home to 15 diverse ski resorts, each blanketed in The Greatest Snow on Earth® and offering something for everyone. Powderhounds will revel in deep, dry snow and legendary terrain, while families can enjoy welcoming beginner areas, ski schools, and off-slope furn like tubing, snowsheeing and mountain dining. From world-renowned destinations to charming local germ, each resort delivers a unique atmosphere and unforgettable experience. With 10 resorts less than an hour from SR tlake City International Alrport. Utah offers the most accessible ski vacation in North America, making it easier than ever to chase fresh tracks or share smiles in the

Learn more

Select offers in Utah

What's Next?

Data driven success metrics and market prioritization

- Market Indexing
 - Market prioritization using weighted factors including:
 - Previous year visitation and spending
 - Spend per visitor
 - 2029-2030 Forecasts
 - Direct flights/access
 - Year-round spend (quality visitation/all seasons)
 - Comp set ranking
 - Other factors: Demographics, Visa wait times, National ranking.
 - Implement and roll out end of the year
- B2B product and inventory audit
 - Audit of travel trade room nights, product and seasonality
 - Use this data to better inform B2B partnerships, campaigns and product development
 - Score and use as benchmark for partnerships and reporting for our DMO partners
 - Received end of September/implemented in the coming months



What's Next?

- Executing a proactive and targeted messaging campaign to counteract negative national perceptions, show industry leadership, and support a key piece of Utah's perpetual visitor economy.
 - o Goals:
 - Generate positive coverage in international markets about travel to UT
 - Create tools and resources for partners in the state
 - Messaging:
 - Press releases, newsletters, social: build messaging for our international vendors to use across channels (b2b/b2c), and media
 - Lead with unified messaging across the state
 - Kick off the decade before the 2034 Winter Olympics



LIFE LIFE LIFE LIFE ELEVATED

Thank you!