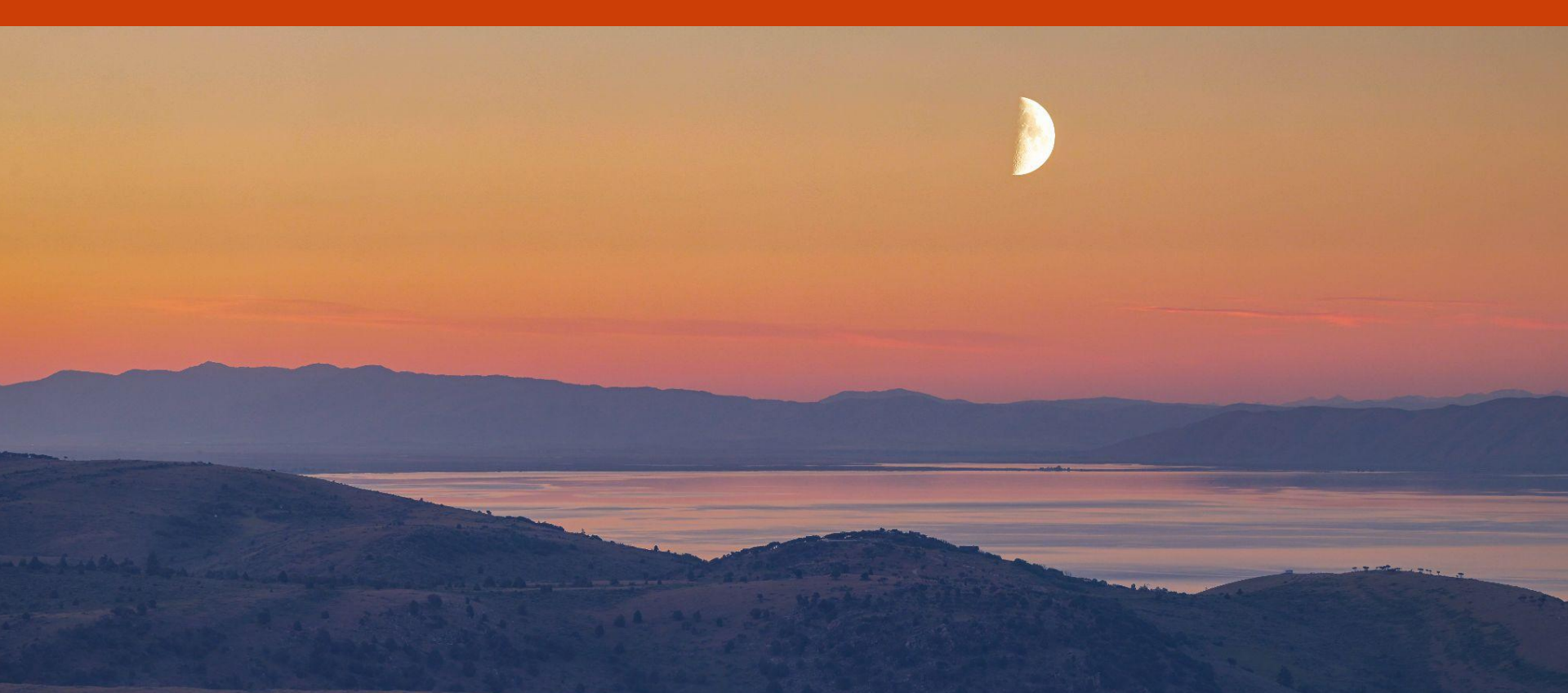




Utah Board of Tourism Development

**AUGUST
2026**

UTAH
LIFE ELEVATED

Managing Director Report

Natalie Randall

Managing Director





UTAH

2025 Travelers Spent

\$13.7B



Resulting In

\$2.7B

State & Local
Tax Revenue*

*Sources: Tourism Economics,
Kem C. Gardner Policy Institute,
Utah Office of Tourism

In FY24 out-of-state visitors generated:

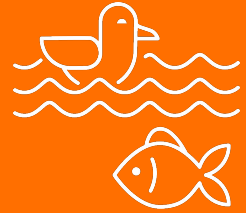


Over half
a billion
dollars to state and local
education



Over
1,000
Utah educators

Maintenance of over
1,500
miles of roads



1 in **10**
state tax dollars



1 in **7**
local tax dollars



1 of every **5**
state tax dollars to
Transportation



\$2.5
towards Fish & Wildlife
Conservation
m

1 of every **8**
state tax dollars to
Criminal Justice and
Public Safety



102
outdoor recreation projects
in 24 (of 29) counties



8%
of Primary Care and Rural
Health program funding



1 of every **5**
state tax dollars to Agriculture,
Environmental Quality,
& Natural Resources



78% of residents say tourism has a positive effect on Utah's overall reputation.

Utah residents recognize tourism's influence on the quality and variety of recreation, dining, arts and culture, community events, and accessibility to local amenities.

2026 Resident Sentiment Survey
Statewide





Vision

A state united in welcoming
the world to experience Utah.

ELEVATE LIFE IN UTAH

ADVANCING THE VISITOR ECONOMY

MARKETING



DEVELOPMENT



STEWARDSHIP



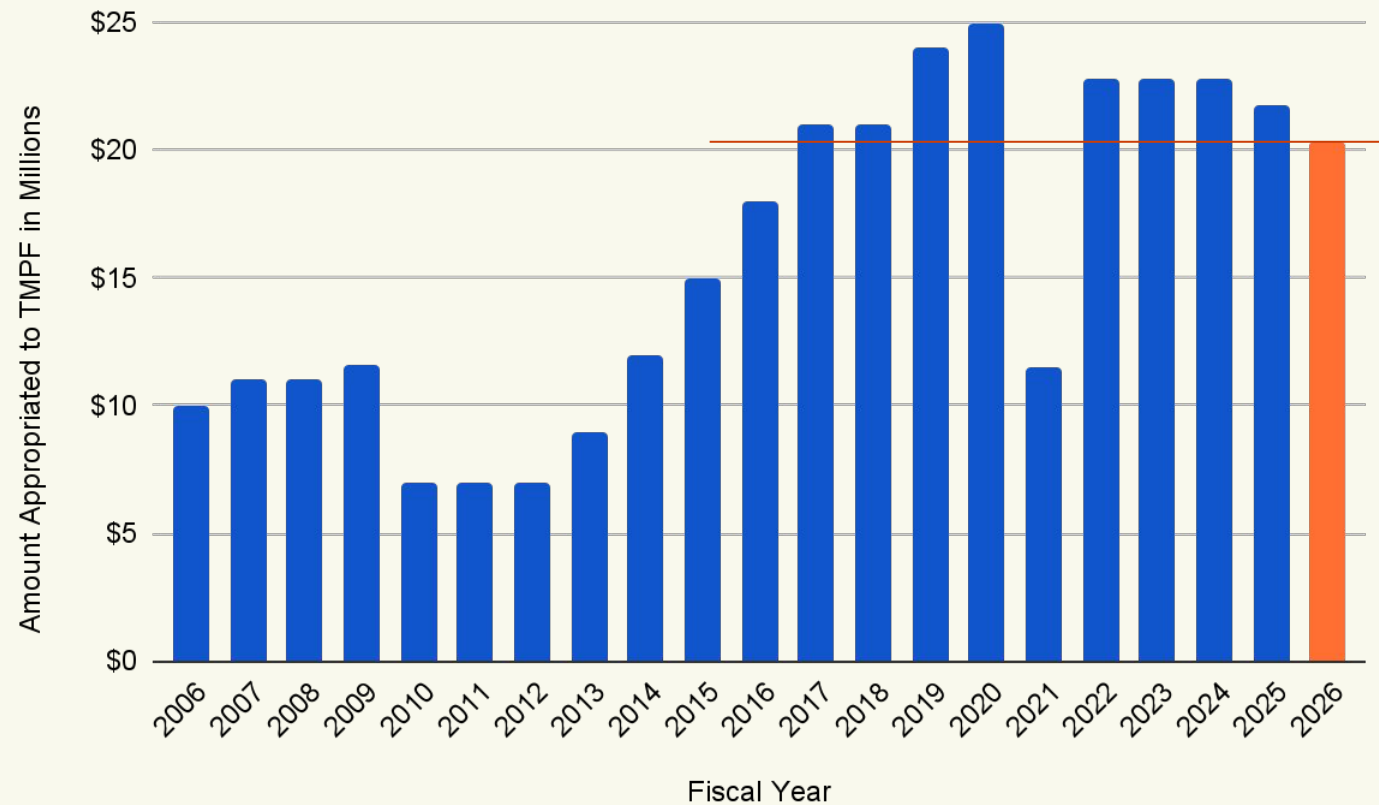
RESEARCH, DATA, & ANALYTICS

VISITORS

RESIDENTS

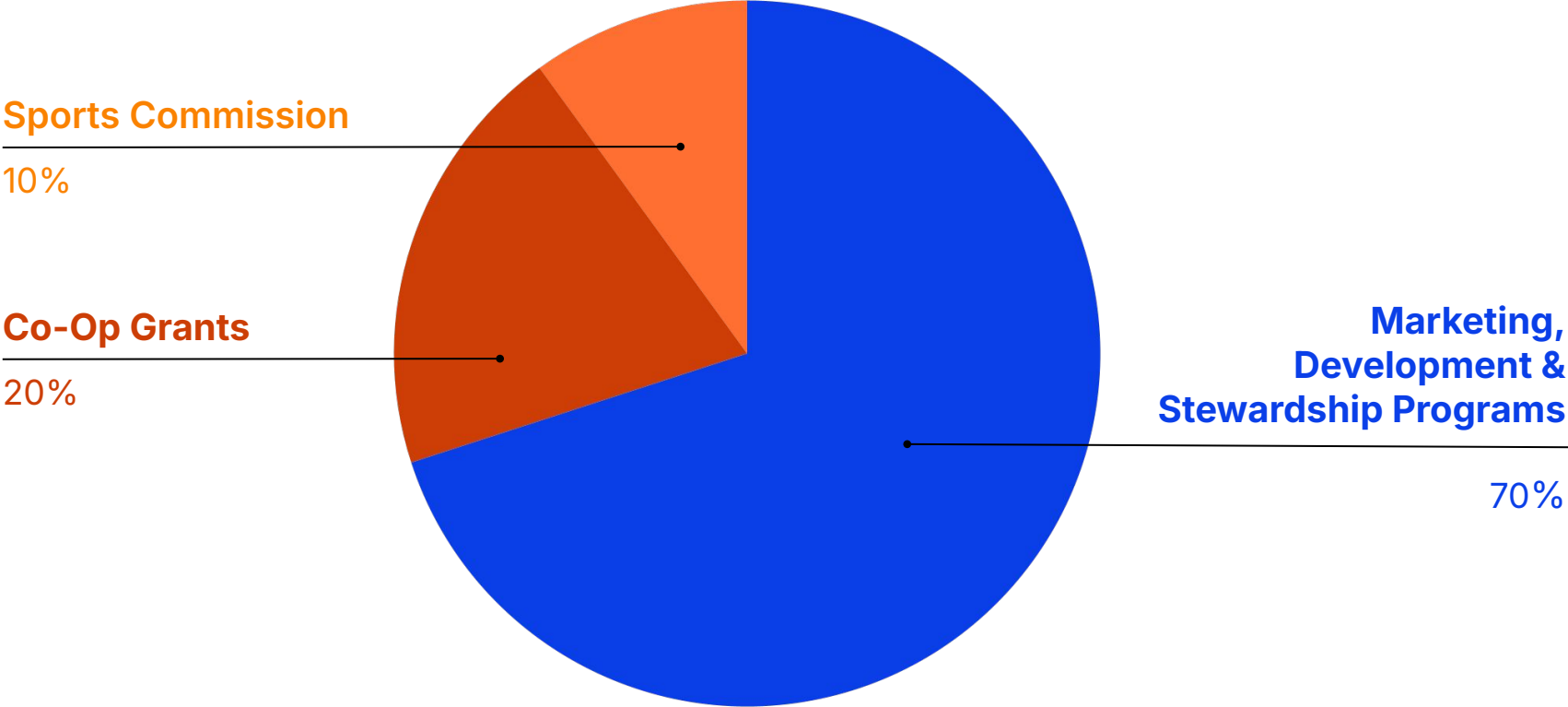
STAKEHOLDERS

Utah's Investment in TMPF



TOURISM MARKETING PERFORMANCE FUND

FY 26/27 Appropriation: \$20.3M



2026-27 Domestic Marketing Plan



Ben Cook
Director of Marketing
Utah Office of Tourism

UTAH

TODAY'S PLAN

1. Revisit Fundamentals
2. Marketing Plan
 - Strategy
 - Activation
3. Recap + Questions & Discussion







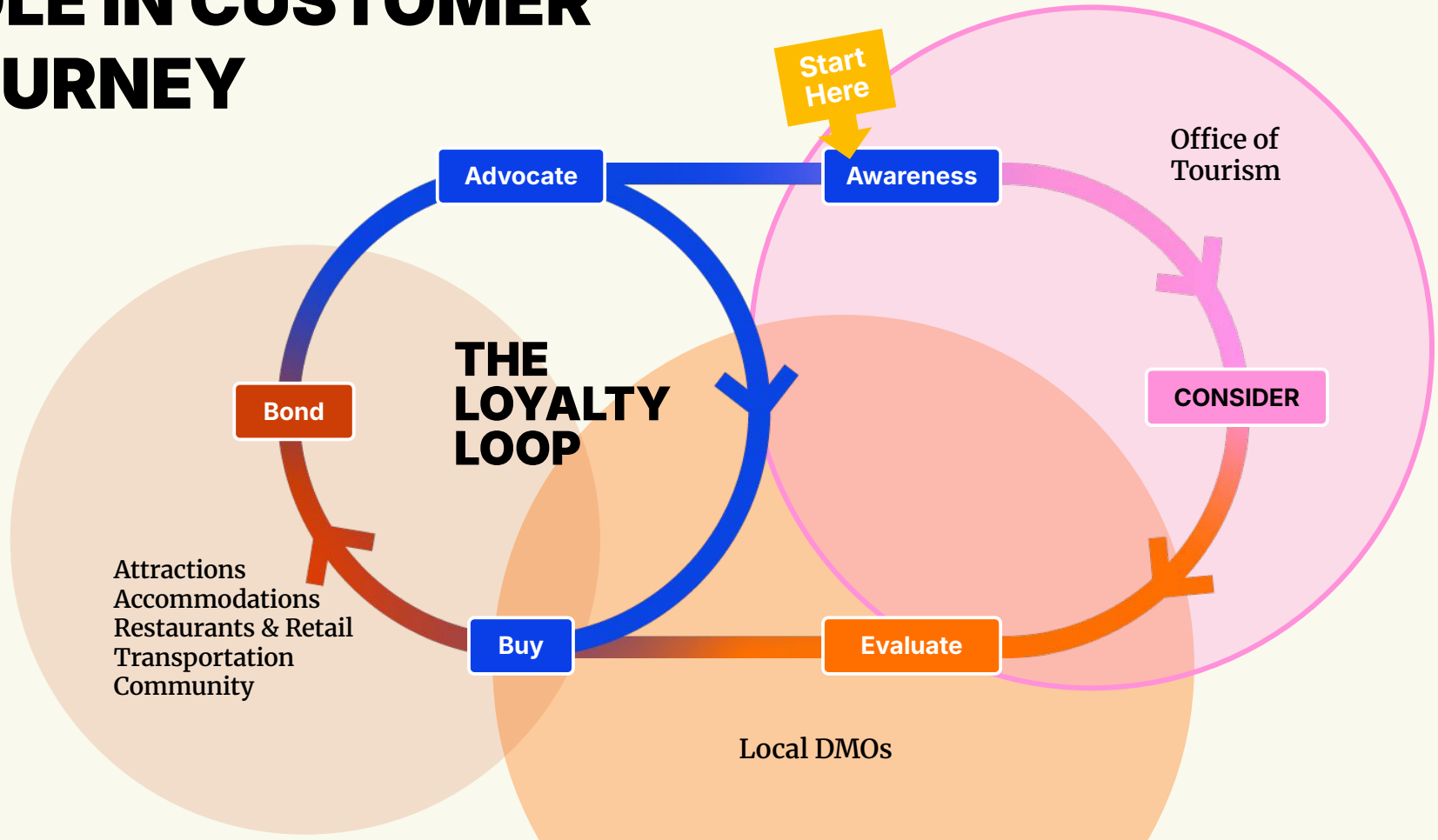
**VISITORS
MAKE
LIFE BETTER
IN UTAH**



Marketing is telling a story people want to hear.

SETH GODIN

ROLE IN CUSTOMER JOURNEY



TYPES OF MEDIA



Engagement

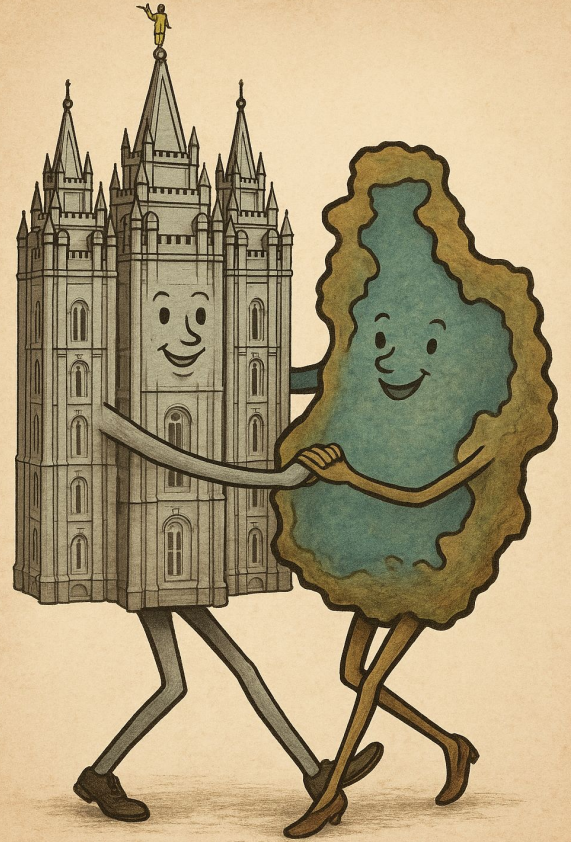


**"DEVELOP ONE SIMPLE
CONCEPT.
LIVE IT WITH EXCELLENCE,
PASSION, IMAGINATION
& FANATICAL
CONSISTENCY."**

BRUCE JENSEN



TWO STEP



TWO-STEP APPROACH

1

STRATEGIC FOUNDATION

- Situational Analysis
- Goals
- Segment/Target
- Brand Positioning

INPUTS

2

BRAND ACTIVATION

- Creative Platform
- Messaging
- Media
- Performance

OUTPUTS



STRATEGIC FOUNDATION

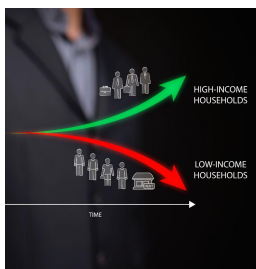
ITALY

TRENDS SHAPING THE NEXT YEAR



DOMESTIC DEMAND IS HOLDING

Travel intent remains high and leisure still dominates the mix. The question is not whether people travel, but how carefully they choose.



A SPLIT-SCREEN ECONOMY

Higher-income cohorts keep spending while value seeking behaviour rises everywhere else. Averages hide the real picture.



EXPERIENCE-FIRST SPENDING

Travelers now seek meaningful moments over bucket lists. The question is not whether Utah has the landscapes, but how tangible we make the experience.



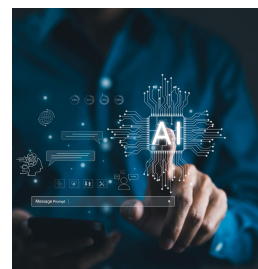
YOUNGER TRAVELERS SET THE CURVE

Gen Z and Millennials are driving discovery, format preference and destination choice well beyond their share of spend.



A MILESTONE YEAR FOR PUBLIC LANDS

Access, staffing and reservation systems are shifting. Dispersal and preparation messaging carry more weight than ever.



ZERO-CLICK DISCOVERY

AI answers are absorbing the first search. Brand recall and generative engine visibility now decide whether we are considered at all.

CHALLENGES & OPPORTUNITIES



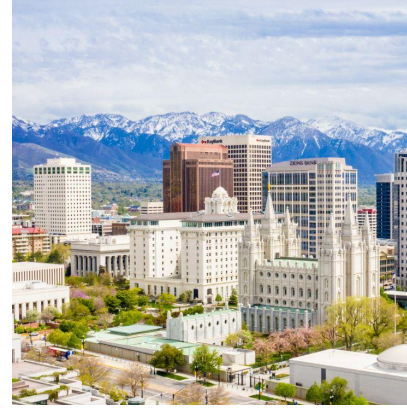
FLAT FUNDING, RISING COSTS

TMPF sits near \$20 million – a decade low in funding. Flat dollars buy measurably less media each year.



EVOLVING MEDIA LANDSCAPE

Platform fragmentation, algorithm shifts, and AI are eroding paid and organic discovery, making it harder to reach and convert younger travelers at scale.



MARQUEE-EVENT RUNWAY

A dense calendar of unique moments arrive alongside the loss of Sundance from the winter mix.



RESIDENT SENTIMENT

Utahns remain net positive on tourism, but housing affordability is the biggest concern in the tracking.



**UTAH
PERSON**

50%

**National
Advertising
Awareness**

6.3%

**Incremental
Travel**



**IN LOVE.
IN UTAH.**

53%

**National
Advertising
Awareness**

3%

**Incremental
Travel**

TRAVELER IMPACT

Comparing the Behavior of Ad-Aware vs. Unaware Visitors

Spend Per Trip

\$2,141

Ad-Aware Travelers

\$1,904

Unaware Travelers

+12.4% More Spend

Length of Stay

**4.6
Nights**

Ad-Aware Travelers

4.2 Nights

Unaware Travelers

+9.5% Longer Stays

Activities

6.8

Ad-Aware Activities

4.3

Unaware Activities

+58.1% Activities

Social Advocacy

82%

Shared Trip on Social

66%

Unaware (Shared)

+24.2% Higher Sharing

TRAVEL BRAND ASSOCIATIONS



31%

**The Mighty
5**

Over Prior
Measurement

▲ 24%

34%

**The Greatest
Snow on Earth**

▲ 41.7%

22%

Life Elevated

▲ 29.4%

GOALS & PRIORITIES

GOALS

Primary Goal

Enhance the economic impact of travel and tourism in Utah.

Secondary Goal

Strengthen Utah travel brand associations across audiences.

STRATEGIC PRIORITIES

Awareness

Inspire awareness and interest in Utah travel.

Travel Impact

Extend visitor length of stay and spend.

Planning & Preparation

Guide visitors to plan well, explore widely and travel responsibly.

TARGET AUDIENCES



ADVENTURERS

Purposeful explorers seeking the next chapter.



FAMILIES

Memory-focused planners needing engaging, easy logistics.



SKIERS

High-spending travelers taking multiple winter trips.



VENTURISTAS

Social hybrids blending aesthetics with unexpected exploration.

BRAND POSITIONING

From The Mighty 5 to The Greatest Snow on Earth

Utah's breathtaking and contrasting places offer incredible access to *transformation, exploration, and discovery.*

No matter what kind of adventurer you are, in Utah you will encounter experiences that *challenge, awaken, and define* you.





BRAND ACTIVATION

ITALY

UTAH ISN'T FOR EVERYONE.

BUT FOR THE *RIGHT* PERSON
- IT'S EVERYTHING.



FOUR CAMPAIGNS

ADVERTISING



PARKS & BEYOND

Inspiration that spans the state,
from the Mighty 5 outward.



SKI & WINTER

Powder days and apres nights,
on and off the mountain.



URBAN & OUTDOORS

City streets to summit peaks,
in a single day.



ALWAYS ADVENTURE SAFE

Stewardship and preparation,
made shareable for partners.

PARKS & BEYOND

Inspiration that Spans the State

Iconic Mighty 5 inspiration extended into astrotourism, agritourism, state parks and lesser-known corners of the state driving longer, higher-value stays.

\$3.7M

MEDIA INVESTMENT

\$195K

PAID SOCIAL

OCT 15, 2026 – MAY 30, 2027

FLIGHT WINDOW

Winter | Holiday Blitz | Spring



The Greatest Snow on Earth, 15 resorts, an international airport, and the full on-mountain and off-mountain arc of a Utah winter.

\$1.97M

MEDIA INVESTMENT

\$105K

PAID SOCIAL

**OCT 1, 2026 – MARCH 15,
2027***

FLIGHT WINDOW

* condition-dependent

SKI & WINTER

Powder Days + Après Nights





URBAN & *City Streets to Summit Peaks* OUTDOORS

Outdoor adventure and urban discovery in a single day, positioning the Wasatch as a destination few places can match.

\$794K

MEDIA INVESTMENT

\$110K

PAID SOCIAL

APRIL 15 – JUNE 30, 2027 *

FLIGHT WINDOW

*May change pending Temple Open House

ALWAYS ADVENTURE SAFE

In-State Stewardship Campaign

This campaign inspires and educates residents to explore with care. By focusing on simple yet shareable guidance: bring enough water, check conditions, stay on the trail, know your limits, dress for the environment, and tell a friend before heading out.

Flight Window

March 15 – May 15, 2027

Media Investment (includes social)

\$300,000



FRANK & MORRIS

Utah's resident vultures leading the charge for responsible exploration.

MULTI-CHANNEL STRATEGY

Campaigns Work Across Earned, Share and Owned Media

EARNED *

Monthly headline pitches

Quarterly media missions

Individual media visits

Curated media fams

SHARED

3-5 weekly organic posts

Social-first video series

Expanded Reddit presence

Collaborative posts with
in-state partners & DMOs

OWNED

52 weekly emails

Content development tied
to campaigns

Ongoing site optimization
and organic search

Continuous UX/accessibility
enhancements

CONTENT

30 campaign-aligned
content pieces

2 original long form videos

YouTube search videos

Content reflecting regional
equity

*lead by Communications, collaboration with Marketing



2026-27 PLAN RECAP

ITALY

FY27 MARKETING AT-A-GLANCE

Goals

Primary

Enhance the economic impact of travel and tourism in Utah.

Secondary

Strengthen Utah travel brand associations across audiences

Strategic Priorities

Inspire awareness and interest in Utah travel

Extend visitor length of stay and spend.

Guide visitors to plan well, explore widely, and travel responsibly.

Tactics

- Integrated advertising campaigns
- National headline pitches, media missions, activations
- Media FAMS & individual media visits
- Weekly email newsletters
- Content marketing - paid, social, and owned
- GEO, AEO

- Integrated advertising campaigns
- Content marketing - paid, social, and owned
- Headline pitches
- Personalized email campaigns
- SEO, Paid search

- Incorporate plan/prep messages in integrated campaigns
- Information & Itineraries, travel guide downloads
- SEO, Paid search, GEO
- Content marketing - paid, social, and owned
- In-Market OOH/ Adventure Safe campaign

Top-Level Campaign Measures

Awareness: Advertising Awareness, Ad-Exposed Pageviews | **Travel Impact:** Bookings, Ad-Aware Spend | **Planning:** Content Engagement, Preparedness Intent

CAMPAIGN BUDGETS

Parks & Beyond

	FY26	FY27
Media	\$3.4M	\$3.7M
Social	\$195K	\$195K



Ski & Winter

	FY26	FY27
Media	\$1.8M	\$1.97M
Social	\$105K	\$105K



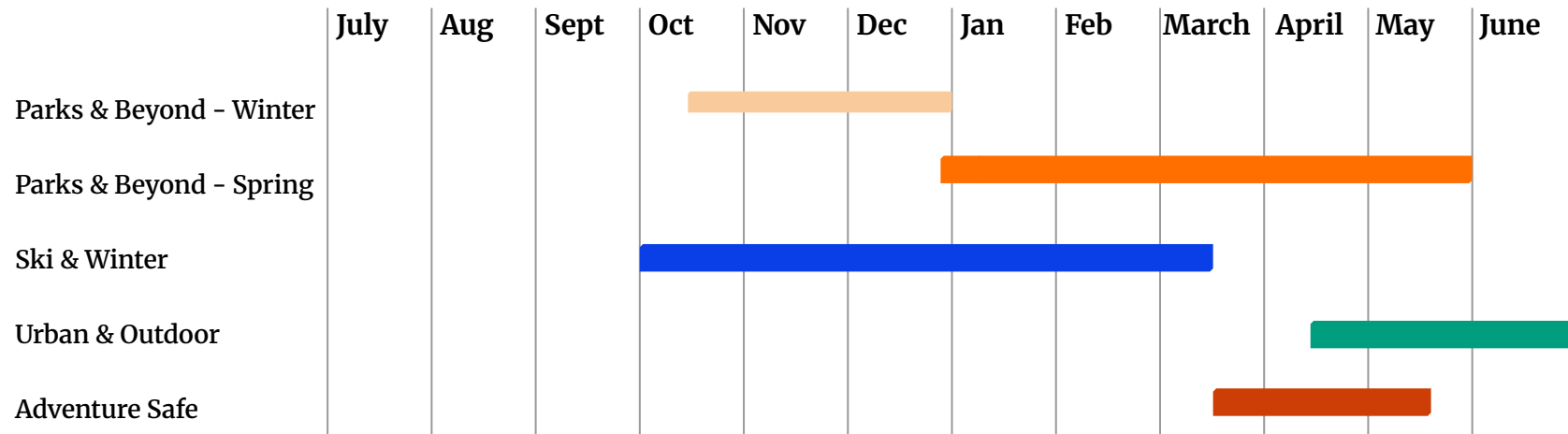
Urban & Outdoors

	FY26	FY27
Media	\$804K	\$794K
Social	\$110K	\$110K

Adventure Safe

	FY26	FY27
Media (includes social)	\$330K	\$300K

CAMPAIGN TIMING





QUESTIONS + DISCUSSION

ITALY

Recommended Motion:

Approve the 2026-27
Domestic Marketing Plan
\$7,842,438



Film Incentive Review
August 2026

Virginia Pearce
Director
Utah Film Commission





↑
THE CHOSEN IN THE WILD
 Premiered August 9
 on Prime Video



↑
MOUSE
 Premieres August 21
 in theatres

RECENT RELEASES & COMING SOON

→
**THE DAUGHTER
 SHE LEFT BEHIND**
 Premieres
 August 15
 on Lifetime



→
**EDIE ARNOLD IS
 A LOSER**
 Premieres
 September 4
 in theatres



FILM INCENTIVE FUNDING

CASH

\$1.4M

Community Film
Incentive Program

\$11M

Total Film Incentive
Funding Available
per Fiscal Year

TAX CREDIT

\$6.79M

Motion Picture
Incentive Program

\$3M

Rural Film
Incentive Program



**COMMUNITY FILM INCENTIVE
PROGRAM**

The Last Treasure Hunt

**MOTION PICTURE INCENTIVE
PROGRAM**

The Secret of Skinwalker Ranch S8

Untitled Republic Pictures Project

THE LAST TREASURE HUNT

Community Film Incentive Program

PRODUCTION HIGHLIGHTS	All Utah team, largest project we've seen from this team who specializes in short films
DISTRIBUTION	Theatrical via Purdie Distribution
LOCATIONS (COUNTY)	Kane & Washington
PERCENTAGE SHOT IN UTAH	100%
ESTIMATED JOBS	Cast & Crew: 32
ESTIMATED SPEND	\$258,913
MAXIMUM INCENTIVE	\$51,783 (20% - Cash)
PRODUCTION DATES (INCLUDING PREP AND POST-PRODUCTION)	June 2026 – January 2027

THE SECRET OF SKINWALKER RANCH SEASON 8

Motion Picture Incentive Program

PRODUCTION HIGHLIGHTS	8th Season of the popular show that spawned Phenomecon
DISTRIBUTION	History Channel
LOCATIONS (COUNTY)	Uintah
PERCENTAGE SHOT IN UTAH	90%, also shooting in Alabama
ESTIMATED JOBS	Cast & Crew: 17
ESTIMATED SPEND	\$2,411,966
MAXIMUM INCENTIVE	\$241,197 (10% - Tax Credit)
PRODUCTION DATES (INCLUDING PREP AND POST-PRODUCTION)	August 2026 – February 2027

Untitled Republic Pictures Project

Motion Picture Incentive Program

PRODUCTION HIGHLIGHTS	Written & Directed by Utah native, Robert Machoian (<i>Omaha</i>), the story is set in Cedar City
DISTRIBUTION	Studio Pickup
LOCATIONS (COUNTY)	Iron & Utah
PERCENTAGE SHOT IN UTAH	100%
ESTIMATED JOBS	Cast & Crew: 60 Extras: 200
ESTIMATED SPEND	\$6,626,992
MAXIMUM INCENTIVE	\$1,656,748 (25% - Tax Credit)
PRODUCTION DATES (INCLUDING PREP AND POST-PRODUCTION)	September 2026 – March 2027

UTAH SPEND / INCENTIVE APPROVAL

Approve a total of \$1,949,728 for incentives for the following productions, which have met the criteria defined by statute.

PRODUCTION	ESTIMATED UTAH SPEND	INCENTIVE AMOUNT PER PRODUCTION	LOCATIONS (COUNTIES)
<i>The Last Treasure Hunt</i>	\$258,913	\$51,783 - 20%	Kane & Washington
<i>The Secret of Skinwalker Ranch S8</i>	\$2,411,966	\$241,197 - 10%	Uintah
<i>Untitled Republic Pictures Project</i>	\$6,626,992	\$1,656,748 - 25%	Iron & Utah
	\$9,297,871 TOTAL Spend	\$1,949,728 TOTAL Incentives	

Co-op Committee Report

Camille Johnson

Director of Community & Partner Relations



2026 CO-OP IMPROVEMENTS

Implemented Tier 1 & Tier 2 Structure

Streamlines the review process, ensures scoring integrity, and maximizes committee efficiency.

Established Tier 2 Scoring Committee

Strengthens applications through peer-driven DMO scoring and actionable feedback.

Refined Application Workflows

Standardized data collection to enable accurate, apples-to-apples comparisons within each tier.

Clarified Strategic Guidelines

Better equips destinations to target out-of-state ROI and maintain competitive market positioning.

Co-op Committee

Tier #1



Lesha Coltharp

Tourism Director
Uintah County
CHAIR



Jessica Merrill

Tourism Director
Davis County



Jordan Smith

Director & Professor
Institute of Outdoor Recreation
& Tourism (USU)



Kevin Smith

CEO & Executive Producer
Tuacahn Center for the Arts

Co-op Committee

Tier #2



Lesha Coltharp

Tourism Director
Uintah County
CHAIR



Joan Hammer

Tourism Director
Box Elder County



Alison Harford

Assistant Marketing Director
Grand County



AnnDee Mead

Tourism Director
Emery County

2026 Co-op Budget Formulation



TOTAL TMPF

\$20,322,800



20% STATUTORY ALLOCATION

\$4,064,500



LESS: VISA SPEND SIGNALS DATA FEE

-\$80,000



FINAL 2026 CO-OP GRANT POOL

\$3,984,500

2026 CO-OP AWARD AMOUNTS

	Tier 1 (DMOs+)	Tier 2 (Non-Profits+)	Combined Total
Total Funding Ask	\$4,517,843	\$1,621,430	\$6,139,273
Total Funds Available	\$3,334,500	\$650,000	\$3,984,500
Funding Shortfall	\$1,183,343	\$971,430	\$2,154,773
Total Recommended Award	\$3,333,900	\$649,974	\$3,983,874
% of Ask Funded	73.8%	40.1%	64.9%

Tier 1 Awardees

Total Awarded: \$3,333,900

Beaver County Travel Council - \$115,300
Box Elder County Government - \$81,500
Cache Valley Visitors Bureau - \$93,600
Carbon County Office of Tourism - \$143,300
Daggett County- \$41,200
Discover Davis - \$181,600
Emery County Office of Tourism - \$38,500
Garfield County Office of Tourism - \$176,400
Grand County Government - \$161,000
Greater Zion Convention & Tourism -
\$126,000
Heber Valley Office of Tourism - \$156,000
Juab County Tourism & Travel - \$97,900

Kane County Office of Tourism & Film - \$157,200
Morgan County - \$56,700
Park City Chamber/CVB - \$154,500
Piute County Government - \$33,900
San Juan Office Visitor Services - \$162,400
Sevier County - \$160,800
Ski Utah - \$179,500
Tooele County - \$122,500
Uintah County Travel & Tourism - \$174,900
Utah Valley VB - \$174,900
Visit Cedar City / Brian Head - \$138,400
Visit Ogden - \$182,200
Visit Salt Lake - \$126,100
Wayne County Office of Tourism - \$97,600

Tier 2 Awardees

Total Awarded: \$649,974

Ballet West - \$27,474

Blanding City- \$6,700

Brian Head Town - \$66,606

Casino Star Theater Foundation - \$8,880

Days of 47 Rodeo - \$25,000

Friends of the Moab Folk Festival - \$4,012

Heber Historic Railroad - \$38,060

Joe's Valley Fest - \$8,880

Kayenta Arts Foundation - \$14,946

Kimball Art Center - \$53,284

Moab Museum - \$3,600

Moab Music Festival - \$15,080

National Ability Center - \$51,698

Ogden Valley Adaptive Sports - \$9,952

Ogden's George S Eccles Dinosaur Park - \$6,898

Park City Historical Society - \$21,786

SUU Shakespeare Festival - \$64,506

Sportsman for Fish and Wildlife - \$50,406

Thanksgiving Point - \$12,528

Tuacahn Center for the Performing Arts -
\$64,506

Utah Festival Opera & Musical Theater - \$36,380

Utah Symphony & Opera - \$24,500

Weber Cultural Legacy Foundation - \$11,156

A man and a woman are sitting in wooden Adirondack chairs by a campfire at night. The man is on the left, wearing a patterned shirt and shorts, and the woman is on the right, wearing a hoodie and pants. They are both holding marshmallows over the fire. In the background, there are several white tents and a body of water under a dark blue sky. The scene is illuminated by the warm light of the campfire and the cool blue light of the twilight.

UTAH

LIFE ELEVATED

Next Board Meeting:
September 11 @ 9am, Virtual