



Travel Sentiment

Winter/Spring 2023

Agenda

- Reasons for Concern
- Reasons to be Optimistic
- Ski Vacations 2023



Tripadvisor



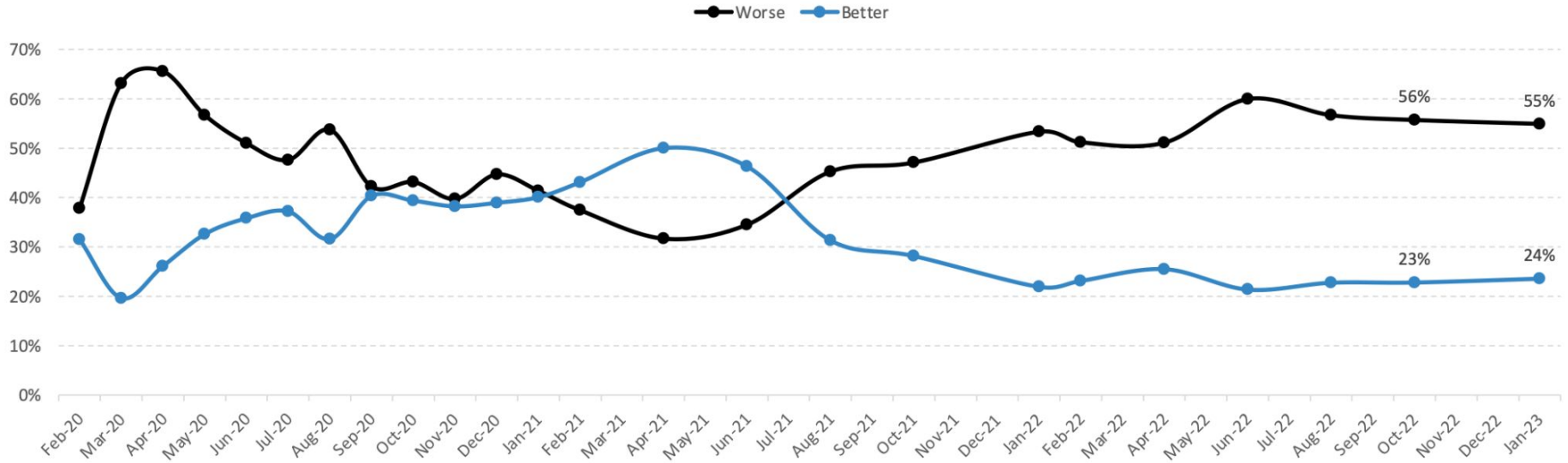
57.2% of survey respondents believe that the United State will enter an economic recession sometime in the next six months.

Reasons for Concern



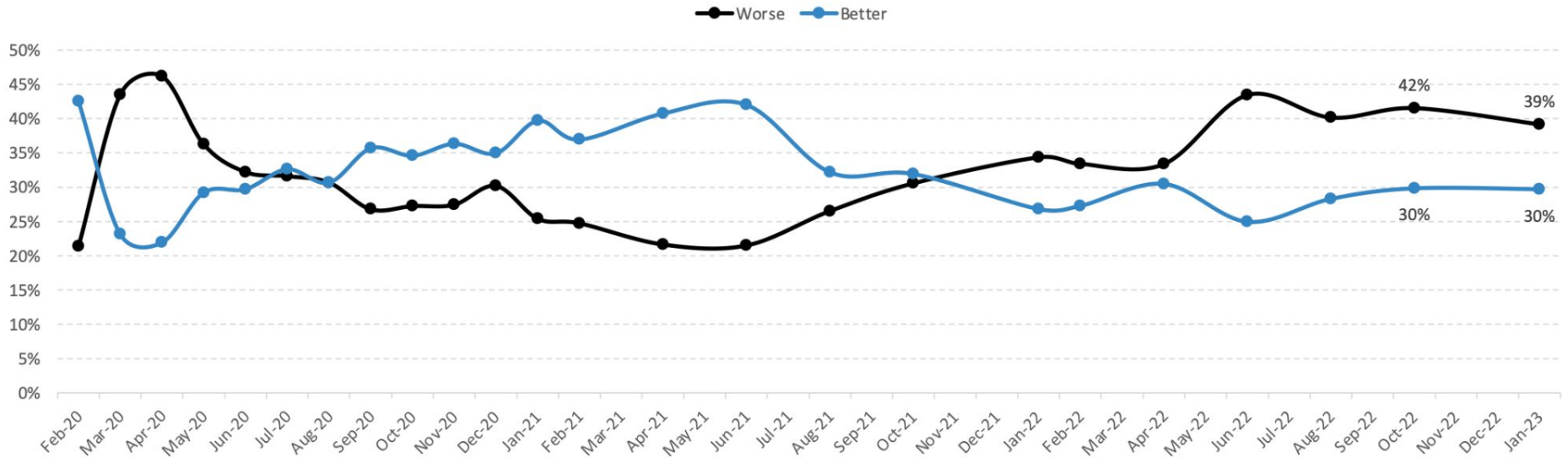
Anxiety About the Economy

Perception of the U.S. Economic Situation in the Next 12 Months, Feb 2020 – Jan 2023



Personal Economic Situation

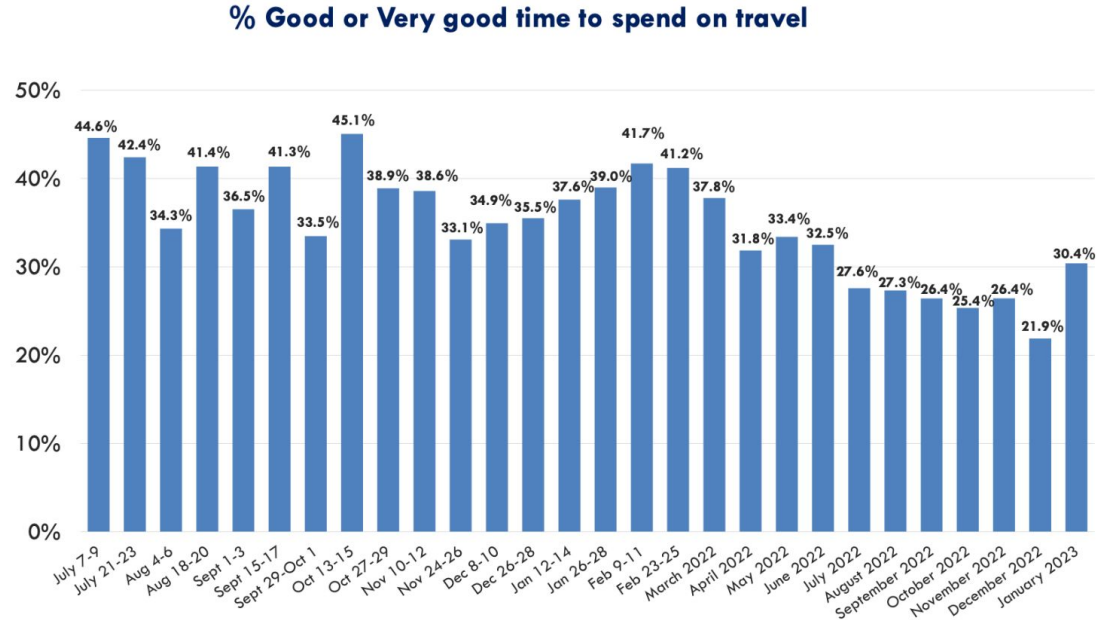
Perception of Personal Economic Situation in the Next 12 Months, Feb 2020 – Jan 2023



Is it a Good Time to Spend on Travel?

Question: Thinking only of your household's finances, do you feel **NOW** is a good or bad time for you to spend money on leisure travel? (Select one)

(Base: All respondents, 1,200+ completed surveys each wave in 2021. 4,000+ completed surveys each wave in 2022 and 2023)

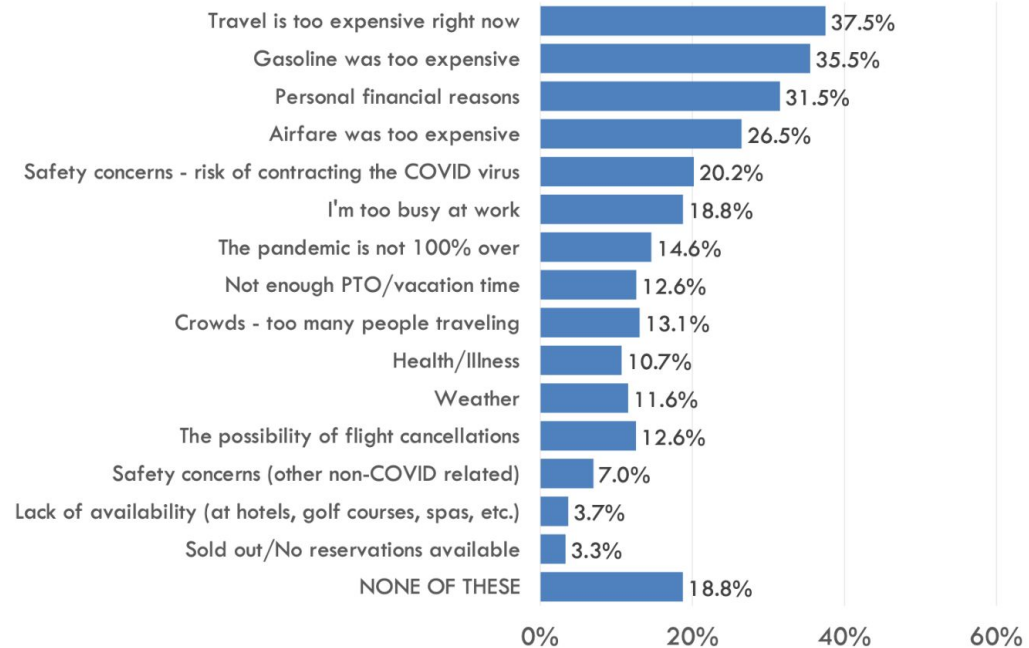


Deterrents to Travel

Question: In the PAST SIX (6) MONTHS, which (if any) of the following have kept you from traveling more than you would have otherwise preferred? (Select all that apply)

(Base: All respondents, 4,025 completed surveys.)

Data collected January 16-21, 2023.)

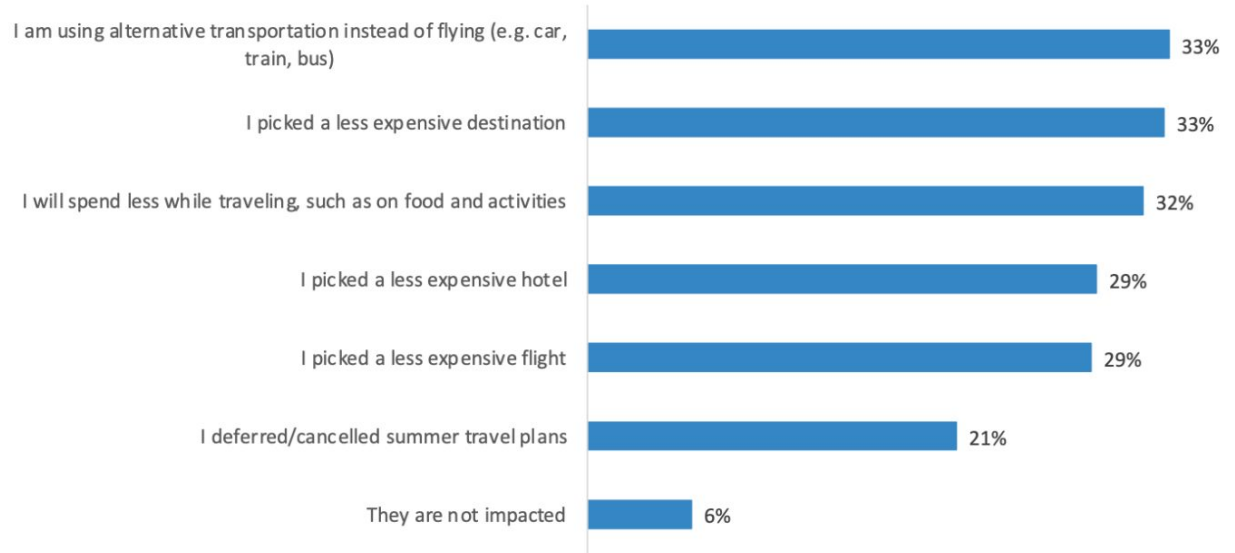


Higher Travel Prices

66%

of respondents who
experienced higher prices said
their travel plans had changed

Ways Respondents Changed Their Travel Plans – Jan 2023

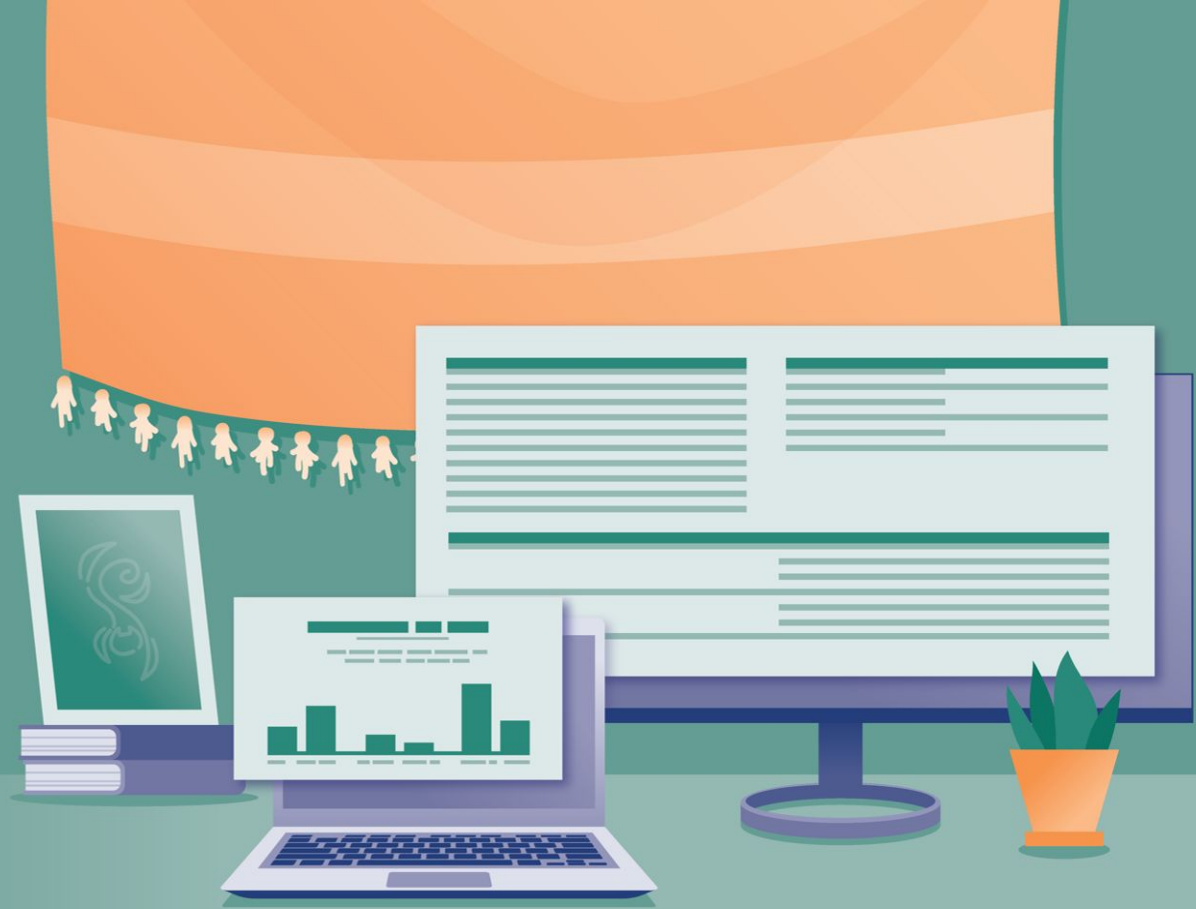


International Travel

Trips Outside the U.S., Jan 2020 – Dec 2022

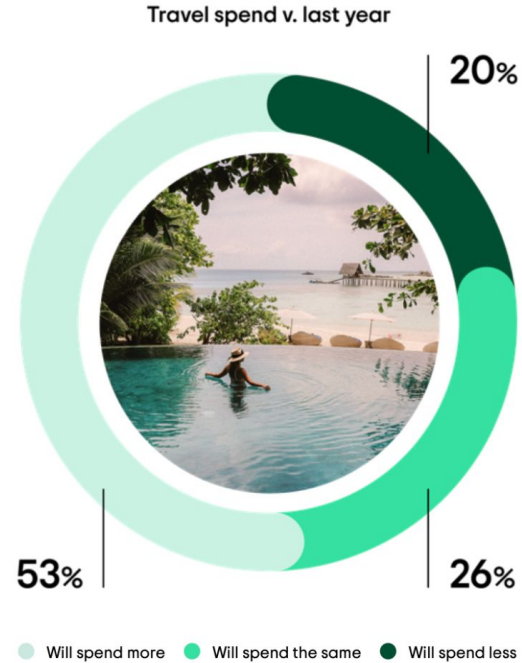
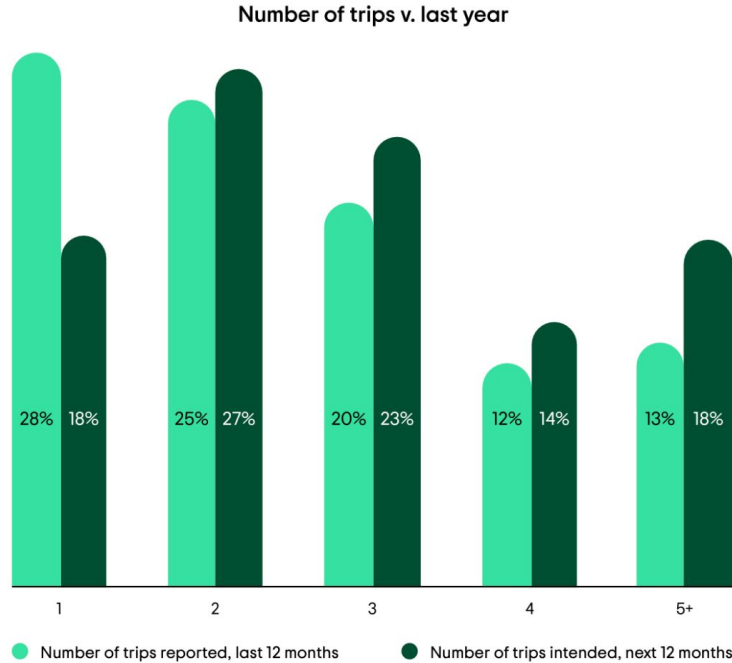


Reasons to be Optimistic



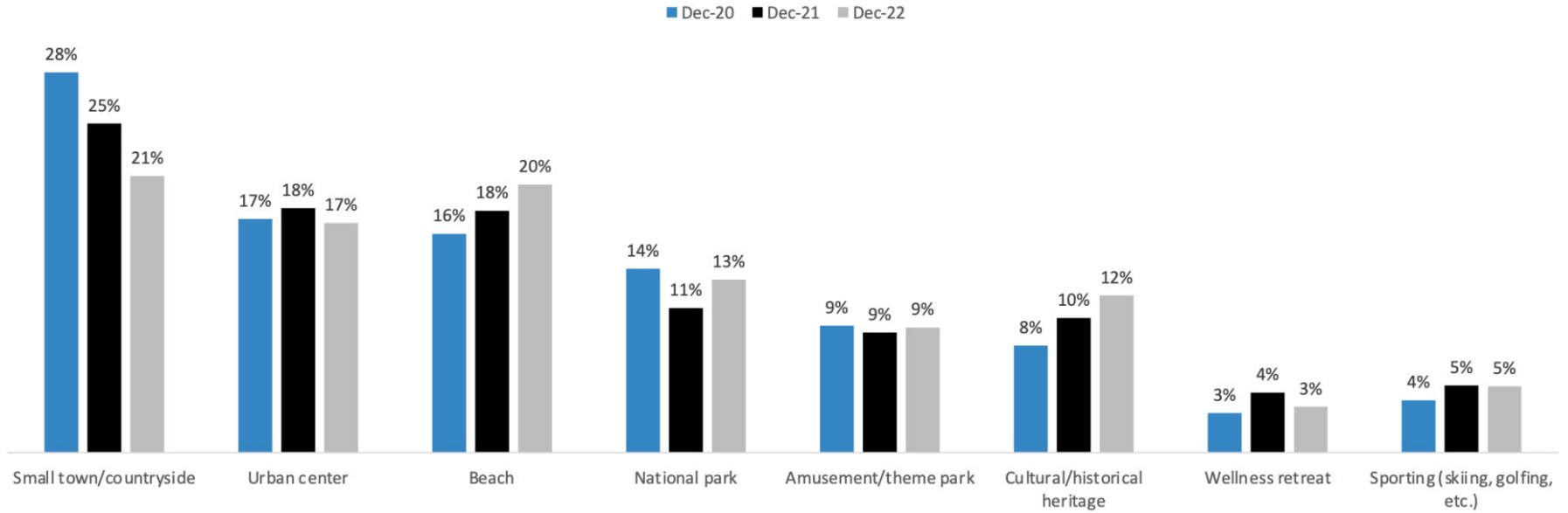
93% of survey respondents are planning to travel in the next 12 months, on par with pre-pandemic (2019) intent.

Travel Intent 2023



Most Popular Destinations

Top Destination Types, Dec 2020, 2021 & 2022



Travel Experience Prioritized in Next 12 Months

Question: Please think deeply about what motivates you to travel.

What really fuels your desire to travel now? (Be honest! Use the scale to tell us how much each fuels your motivation)

(Base: All respondents, 4,025 completed surveys. Data collected January 16-21, 2023.)

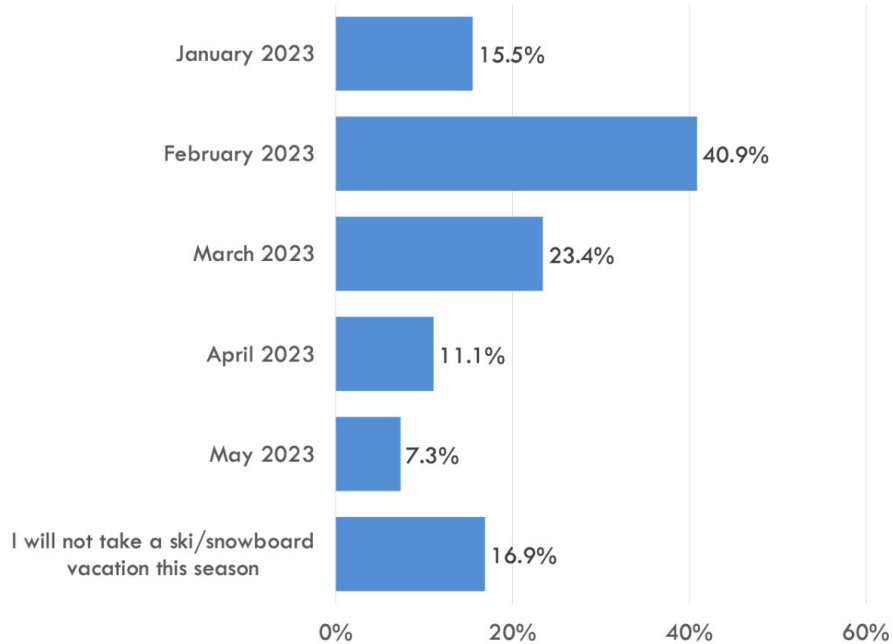


[illegible]

Month of Expected Ski Vacation

Question: If you were going to take an overnight ski or snowboard vacation this season, in which month(s) would you most likely take this trip?

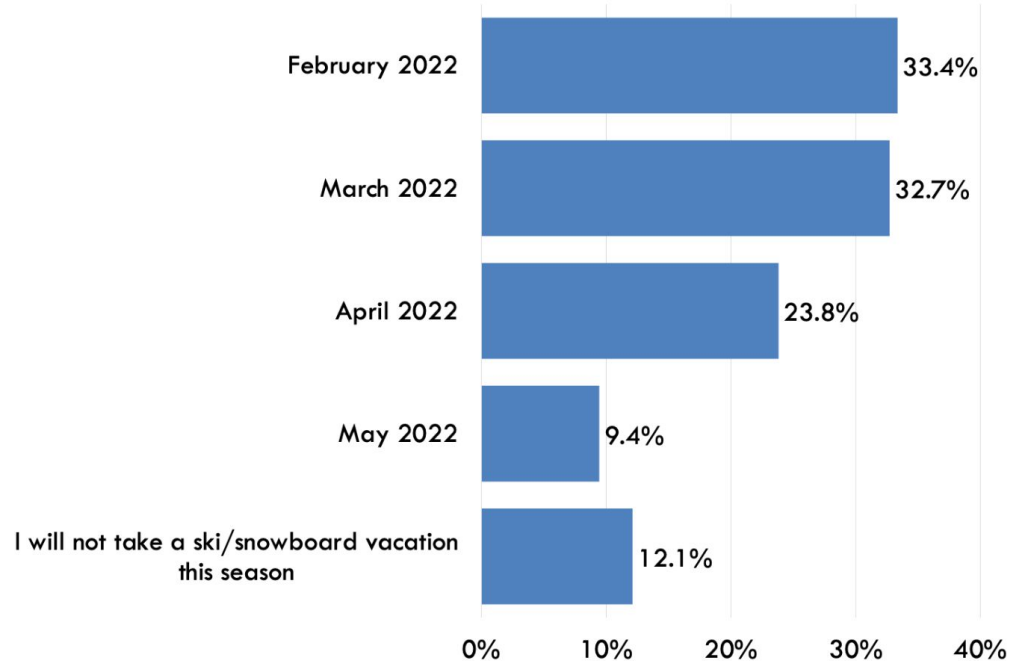
(Base: Respondents who are not unlikely to take an overnight ski or snowboard vacation this season, 946 completed surveys. Data collected January 16-21, 2023.)



Month of Expected Ski Vacation: 2022

Question: If you were going to take an overnight ski or snowboard vacation this season, in which month(s) would you most likely take this trip?

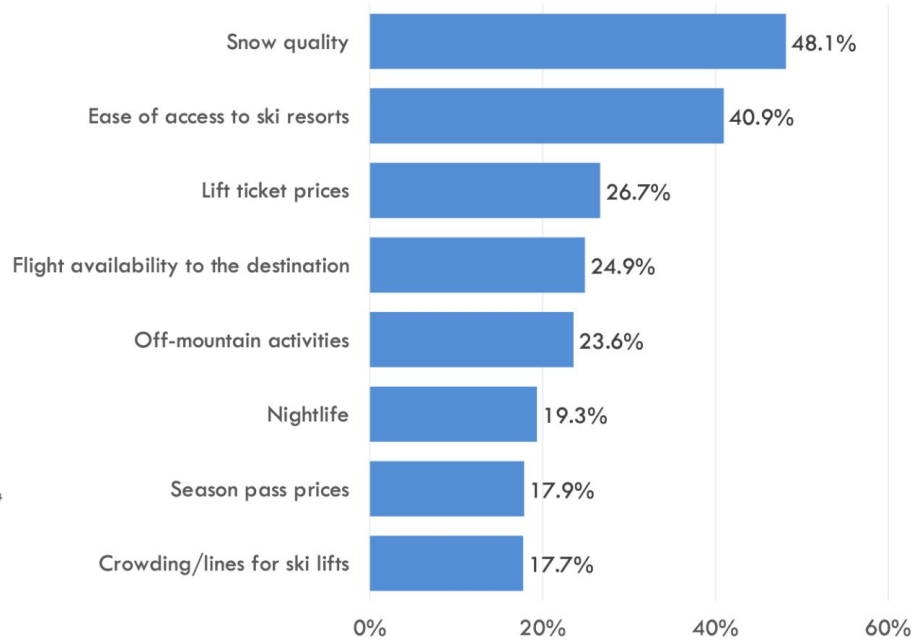
(Base: Wave 83 data. Respondents who are likely or very likely to take an overnight ski or snowboard vacation this season, 383 completed surveys. Data collected January 26-28, 2022)



Important Attributes for Next Ski Vacation Destination

Question: Which of the following attributes will be **MOST IMPORTANT** in selecting your next ski or snowboard vacation destination?

(Base: Respondents who are not unlikely to take an overnight ski or snowboard vacation this season, 946 completed surveys. Data collected January 16-21, 2023.)

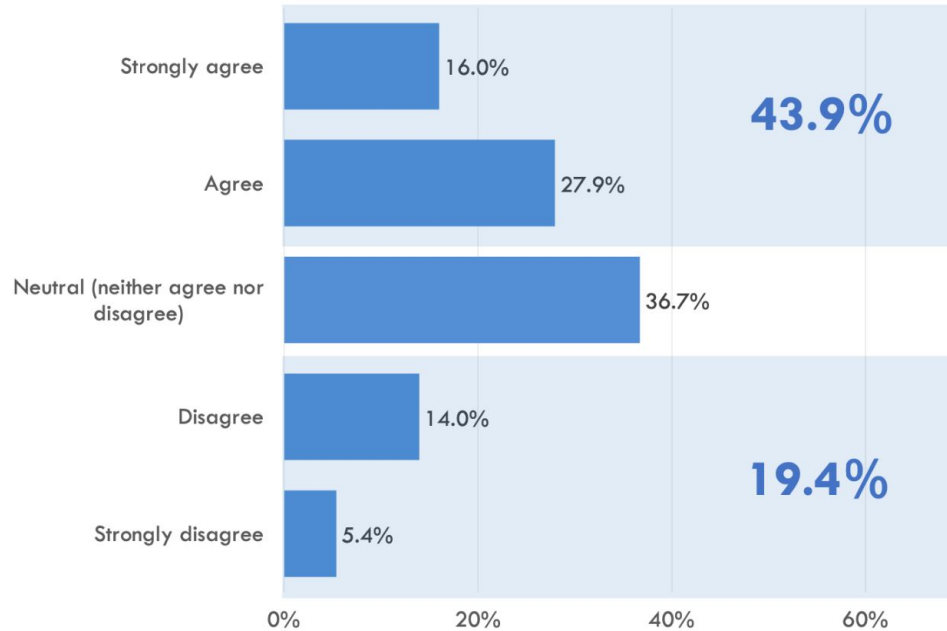


Financial Situation Impacting Ski Travel

How much do you agree or disagree with the following statement?

Statement: Due to my financial situation, I'm likely to cut back on my skiing/snowboarding travel this year.

(Base: Respondents who are not unlikely to take an overnight ski or snowboard vacation this season, 946 completed surveys. Data collected January 16-21, 2023.)





Southern Utah FY23 Campaign Update

Southern Utah - Winter Push

September 15, 2022 - January 31, 2023

516,194

Ad exposed page views

42% Increase

Compared to the 21/22 Campaign

\$24M

Hotel Revenue

\$150

Average Daily Rate



Connected TV

171k

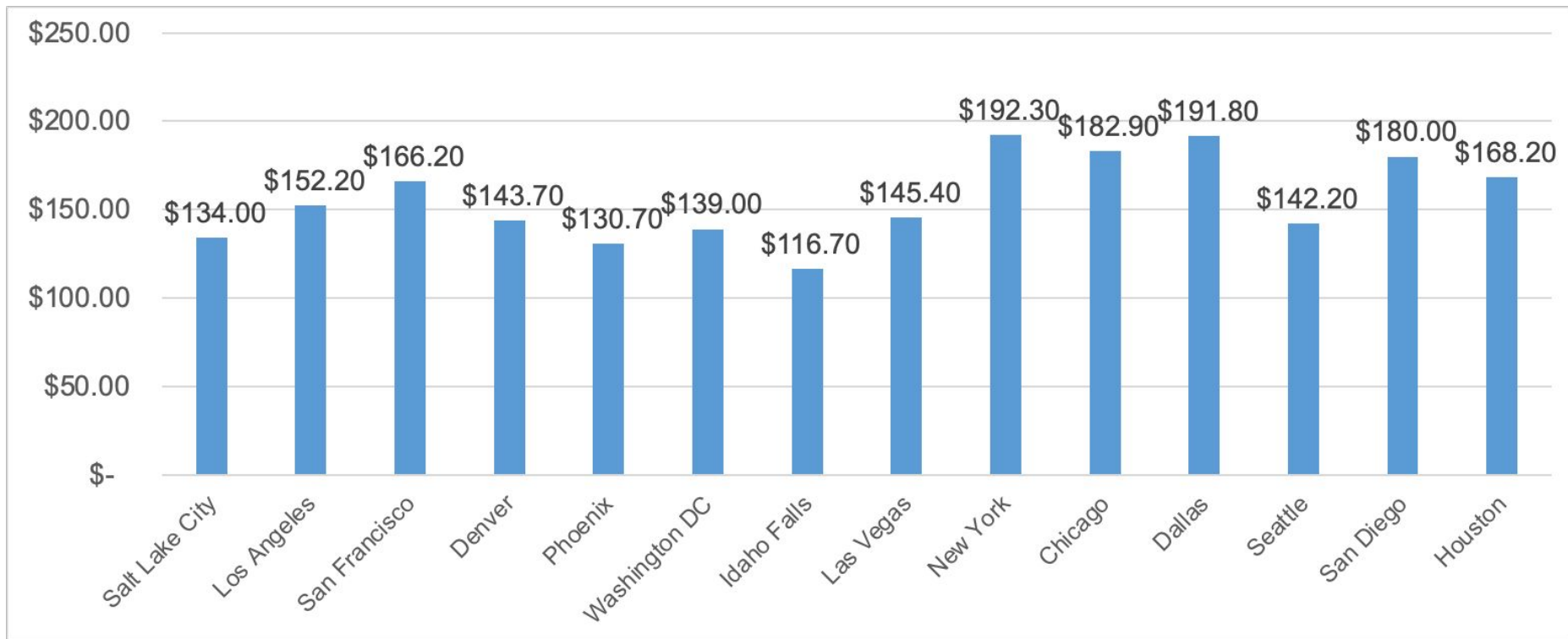
Ad exposed page views

Targeting Past Visitors

Drove the most ad exposed
page views.



Top Booking Markets: ADR



Native Campaign

196k

Ad exposed page views

5 Minutes

Engaging with top performing article

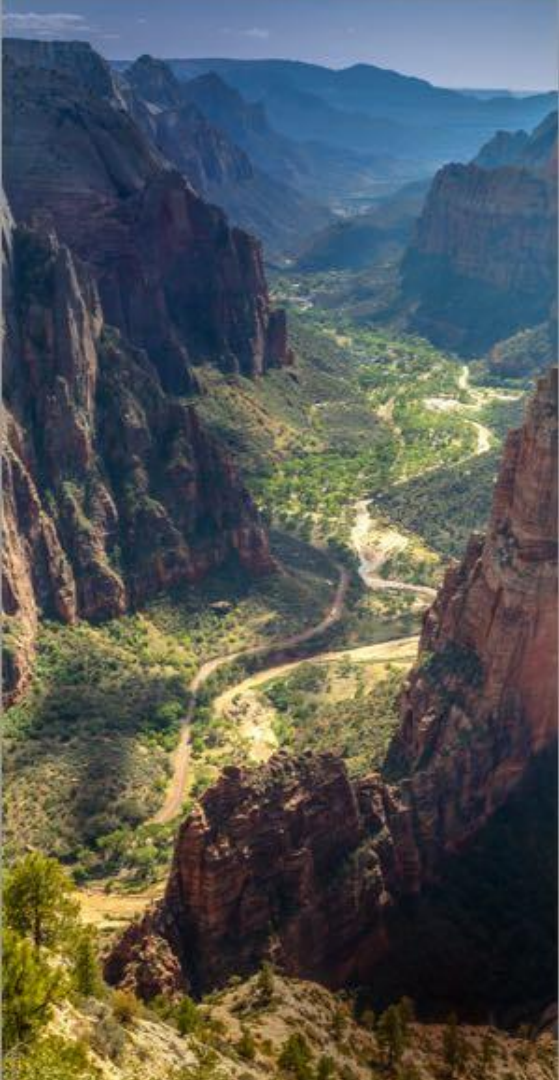


A Winter's Desert: Visiting Southern Utah in the Slow Months

Experiencing the peace of canyon country in the winter is an attraction of its own.

Written By Brinley Froelich





Southern Utah Connected TV Blitz

106k

Ad exposed page views

110% Increase

Compared to the 21/22 Campaign

Retargeting w/ Display Ads

Drove the most ad exposed page views.



Social Media Influencer - Nancy Brown

"Bryce Canyon National Park perfected my winter adventure in Utah! ❄️"

The snow-covered landscape and towering red rock formations created a magical winter wonderland that was like a dream come true. Rent the gear, take a hike, and go snowshoeing or cross country skiing! The canyon is filled with trails to help you explore the winter beauty, and you'll be amazed at the views you can take in during wintertime.

I had a fabulous stay at the Best Western Ruby's Inn. It's pet-friendly and just one mile from Bryce Canyon National Park!

While we have visited Utah many times before, this was my first collaboration with [@VisitUtah](#) and I had a wonderful trip. Thank you [#VisitUtah](#) for partnering with me. ❤️" - @nancydbrown

13,696

Video views

1,051

Engagements





2022 Northern Utah+ Campaign Recap

The Utah Office of Tourism

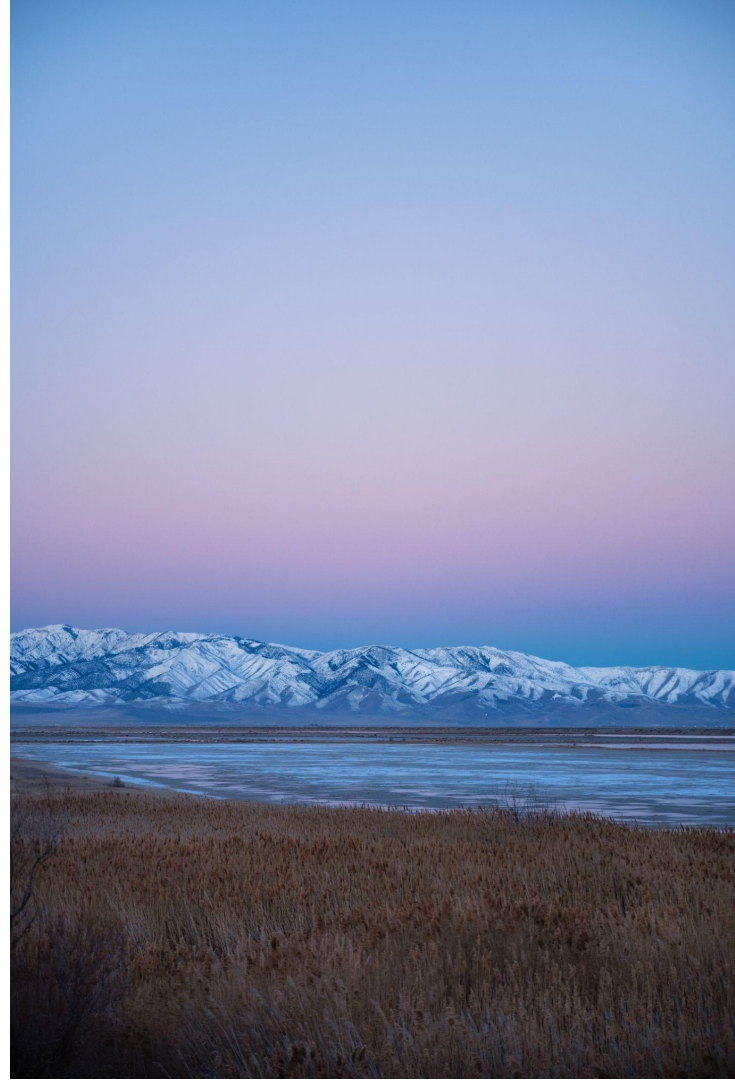
Media Plan

\$680,000

Total Budget

4/1/22 - 06/30/22

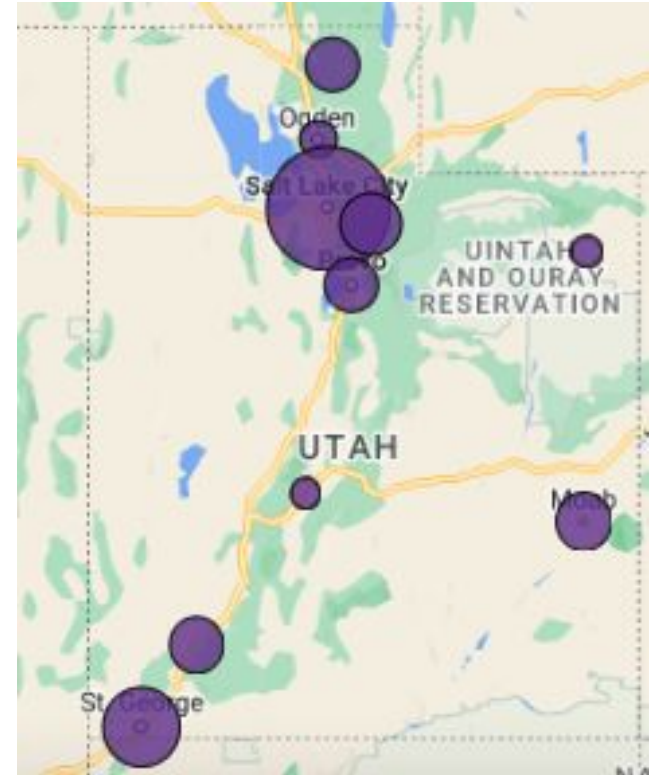
Flight Dates



Results

Campaign Summary

- 97 million impressions
- Post Impression Rate .34%
- 1.8 million hotel searches
- 86K hotel bookings
- **\$23 million in hotel revenue**
- Top hotel destinations:
Salt Lake City, Park City, Ogden, Provo, Logan and Vernal.



Key Learnings

- CTV drove an additional \$9.2 Million and a \$160 ADR
- 64% of our bookers were Adults 40-49
- In Native Advertising Channels:
 - Non-Urban ADR was higher than Urban: \$151 vs \$142.50
 - Non-Urban content drove nearly double hotel revenue than Urban content
 - Length of Stay was same: 2.0
 - Booking window was the same: 3 weeks





2023 Northern Utah+ Campaign Plan

The Utah Office of Tourism

Campaign Strategy

Messaging & Creative

Where mountain and city meet

Northern Utah destinations offer urban accessibility to the outdoors, for a vacation with the perfect balance of activities in the city *and* in nature.



- Updated video and end cards
- Refreshed banners

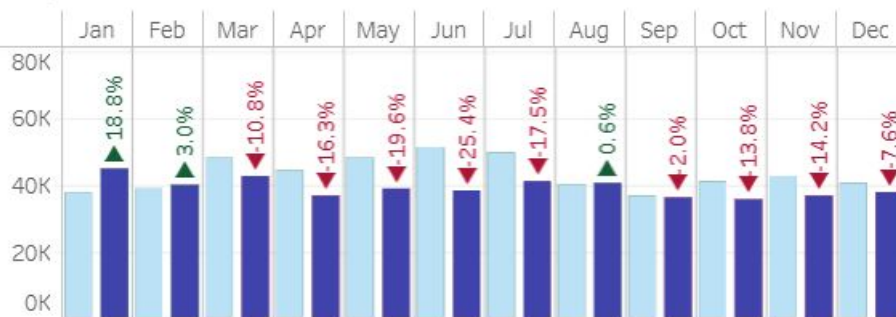


Research Insights

- Spring months have the highest gross booking revenue
- March had the highest room nights booked
- The last few months of the year have the lowest gross booking revenue and lowest level of room nights booked
- Jan-Apr has longer booking windows while summer months have shorter bookings windows, more in the month for the month trips.



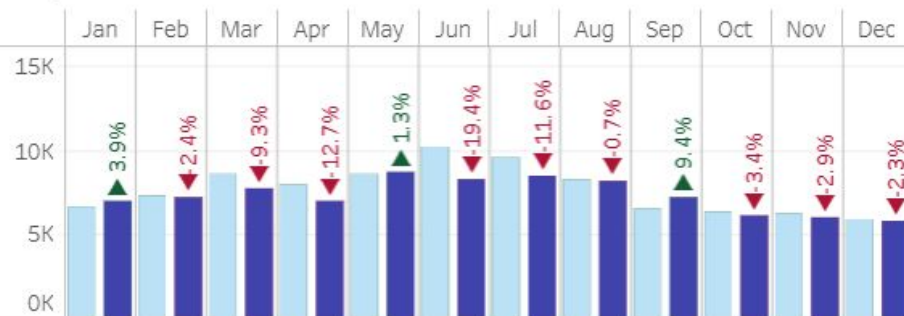
Room Nights



Urban



Room Nights



Northern Communities

Current period: Jan '22 - Dec '22 Previous Period Jan '21-Dec '21

Media

Paid, Earned, & Owned

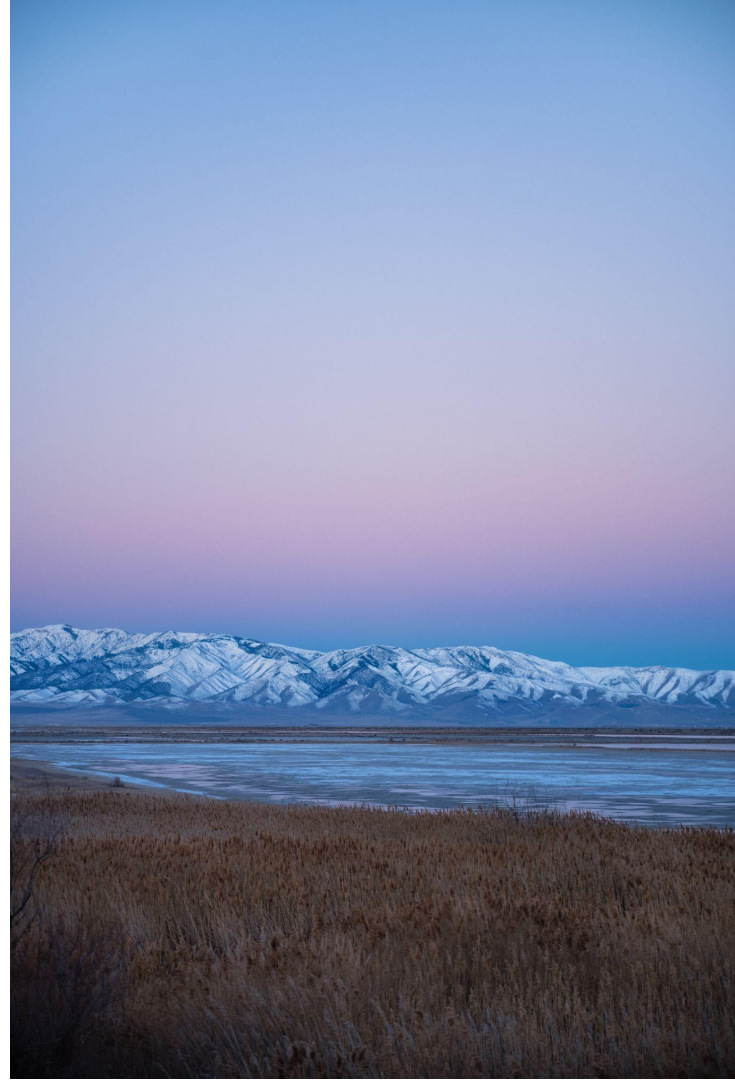
Media Plan

\$715,000

Total Budget

4/15/23 - 06/30/23

Flight Dates



Objectives & Opportunities

- Designed to grow Northern Utah communities brand awareness and inspire trip planning.
- Learn from pre-roll and new display to optimize and inform FY24 creative development.
- Heavy focus on native articles and video.
- Incorporate new studies associated with CTV and native.
- Segment audiences to align content stories with the audiences by geography, behavior, and context.



Media Channels

1

Connected TV

Continue to elevate
Northern Utah via :15 and
:30 spots

2

Native Advertising

Share content and
pageviews of long form
stories from website.

3

Pre-Roll & Display

Keep Utah top of mind
with exposed audiences,
driving quality bookings.

Media Breakdown

Media	2022	2023
Programmatic Native with retargeting display	\$370,000	\$350,000
Connected TV with retargeting display	\$300,000	\$278,000
Programmatic Display/Pre-Roll	-	\$75,000
Ad Serving	\$10,000	\$12,000
Total	\$680,000	\$715,000

Media Flight

2023 Northern Utah + Media Campaign

		April					May				June				July					Total Cost	
		27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24		
Programmatic Native Content																				\$350,000	
Connected TV with retargeting display																				\$278,000	
Programmatic Display and Pre-Roll																				\$75,000	
Ad Serving																				\$12,000	
TOTAL BUDGET																					\$715,000.00

Earned

Public Relations

- Key Storylines:
 - Accessibility to Outdoors
 - Culinary, Spirits, Art & Local Stories
 - Cultural & Natural Heritage
 - A Welcoming Culture
- 30+ Target Publications

Social Media

- Influencers
- Ambassadors
- Organic Posts



Owned

Website & Email

- Landing Pages
- Articles
- Itineraries
- How to Visit



Budget

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