

UTAH TOURISM INDUSTRY ASSOCIATION

QUARTERLY SURVEY REPORT

NOVEMBER 2023

The goal of this report is to provide the results of the waves 1 through 4 surveys that were delivered in Q4 of 2022 through Q3 of 2023, in addition to supplying travel trends impacting the industry at large.

This project provides actionable insights about how visitation is ebbing and flowing around the state and the country.





UTIA QUARTERLY SURVEY REPORT

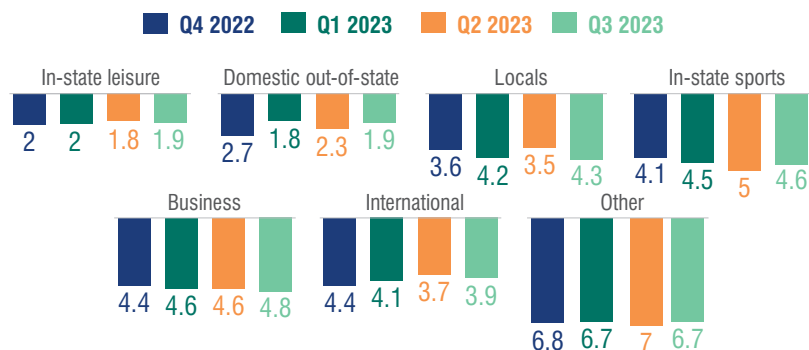
NOVEMBER 2023

COMBINED SURVEY RESULTS

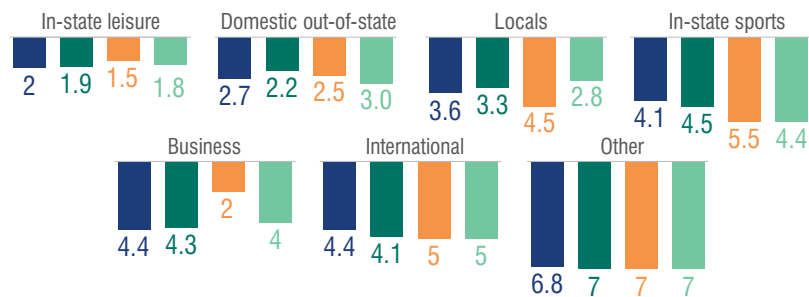
TRAVELER FREQUENCY

We are seeing that domestic out-of-state travel is higher in Southern Counties, while local travel is higher in Northern Counties. In the below graphs, the lower the number, the more often the type of travelers listed is seen.

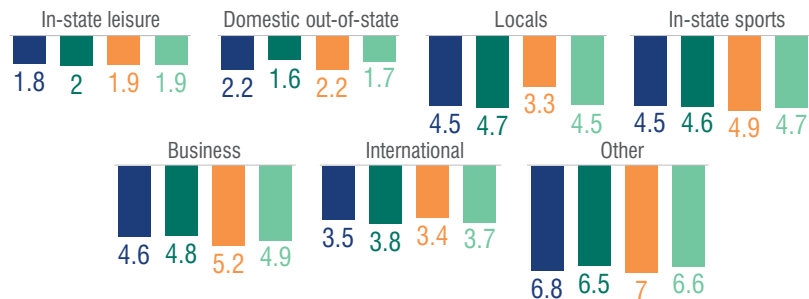
In an average year, what types of travelers/patrons/customers does your organization most often see in your area?



NORTHERN COUNTIES



SOUTHERN COUNTIES



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SURVEY DISTRIBUTION BY COUNTY



COUNTY	WAVE 1 (Q4 2022)	WAVE 2 (Q1 2023)	WAVE 3 (Q2 2023)	WAVE 4 (Q3 2023)
Weber	19	1	0	0
Garfield	11	8	4	15
Salt Lake	6	2	0	1
Iron	4	4	0	3
Wasatch	4	0	0	1
Washington	4	5	3	5
Wayne	3	1	0	1
Grand	2	3	1	3
Summit	2	5	0	2
Other	7	8	3	6

VISITATION TRENDS BY WAVE

Percentage of respondents who saw a **decrease in visitation** for the listed visitor type, by quarter.

Type	Q4 2022	Q1 2023	Q2 2023	Q3 2023
Business	18%	14%	9%	17%
Domestic out-of-state	37%	35%	45%	49%
In-state leisure	32%	41%	0%	40%
In-state sports	16%	24%	9%	29%
International	39%	32%	18%	37%
Locals	18%	19%	0%	20%

Percentage of respondents who saw an **increase in visitation** for the listed visitor type, by quarter.

Type	Q4 2022	Q1 2023	Q2 2023	Q3 2023
Business	24%	19%	18%	20%
Domestic out-of-state	29%	22%	18%	29%
In-state leisure	29%	24%	9%	29%
In-state sports	19%	16%	0%	11%
International	19%	32%	27%	29%
Locals	31%	8%	9%	23%



TRAVEL TRENDS UPDATE

We synthesized a variety of travel trends that are occurring in the nation at-large and compiled them into one clean report using the data sources listed below. Within this report are some highlights pertinent to membership, with the goal to be looking forward into Q2 2023 and Q3 2023.

Destination  Analysts

 GWI

 Expedia

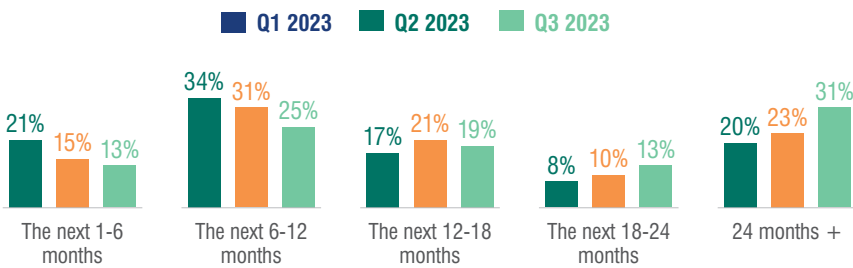
 Tripadvisor

 Skift

 Longwoods
INTERNATIONAL

HIGH PRICES TO REMAIN

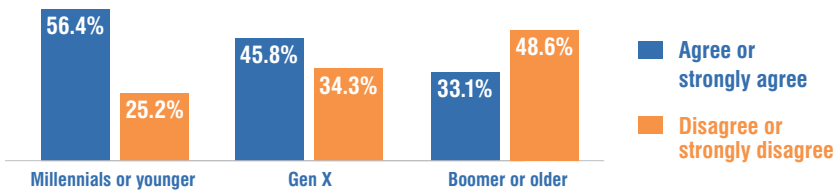
The sentiment amongst travelers is the that prices will remain elevated for personal trips well into the future.



Source: Skift US Travel Tracker Q3 2023

HIGH PRICES IMPACT

This is mostly impacting those in the millennial generation or younger, as opposed to Gen X'ers or Boomers.



Source: Destination Analysts November 2023

CONCLUSIONS



Southern Utah respondents drive most of the sample relative to Northern Utah which is certainly skewing some of our results.



There was a surge in the number of respondents that were collected relative to last quarter.



At a travel trends level, we continue to see that the average individual is very price-conscious in their travel behaviors and patterns.



The combined wave over wave report shows that there has been an increase in local travel and a decrease in out-of-state visitors.



TO VIEW PAST REPORTS OR TAKE THE CURRENT SURVEY, VISIT:
utahtourism.org/quarterlytrends



69% OF TRAVELERS EXPERIENCED HIGHER TRAVEL PRICES WHILE BOOKING PERSONAL TRIPS IN Q3 2023

Source: Skift US Travel Tracker Q3 2023



91% OF INDIVIDUALS ARE EXPECTING TO TRAVEL IN THE NEXT SIX MONTHS

Source: Longwoods Wave 79