



2015 Wyoming Advertising Effectiveness ROI

February 2016

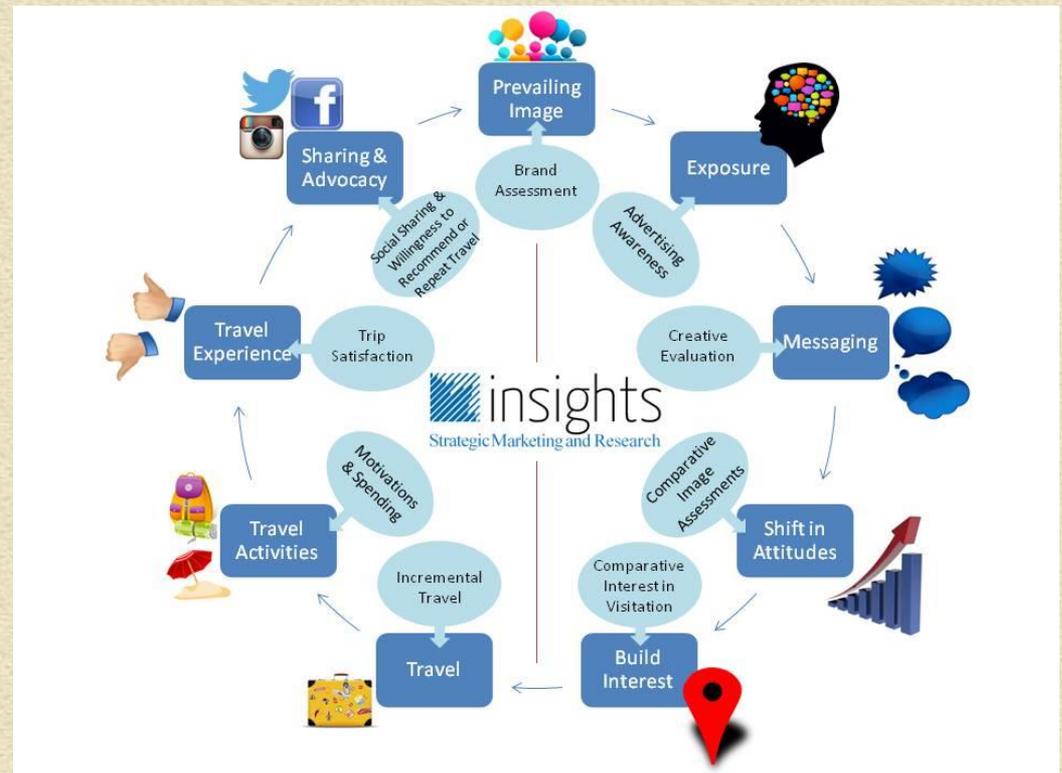


Background & Objectives

- The Wyoming Office of Tourism (WOT) allocates significant resources to leisure marketing, with media placements throughout the spring and summer. Through the refinement of the marketing program, WOT has determined that different audiences need different messages at different times. Therefore media placements are made in more distant markets earlier in the year and the closer markets receive messaging later in the season.
- To account for these differences, Strategic Marketing & Research Insights (SMARInsights) conducts research to correspond with these placements. Two waves of awareness research have been conducted to gather data for this report. The first wave focused on the reach of the campaign, its effectiveness in communicating intended messages, and the advertising's impact on perceptions and planning.
- This wave quantifies the level of incremental travel generated in response to the state's marketing efforts.
- The following report details the findings from this ROI wave:
 - Measure the influence of the advertising on generating incremental travel, or travel that would not have occurred without the paid media;
 - Understand if paid media influenced any repeat visitation;
 - Quantify the economic impact of the influenced visitors;
 - Assess recall of *The Good Dinosaur* creative that was placed after the awareness wave of research was complete; and
 - Provide conclusions and recommendations for future marketing efforts, including target markets and media.

Methodology

- SMARInsights has developed a research methodology based on the cycle of how consumers make travel decisions. The graphic at the right outlines each step of the process and the measure used to evaluate the effectiveness of a destination's marketing efforts.
- The awareness wave of research looked at the steps, clockwise, from Prevailing Image through Build Interest. This wave measures Travel through Sharing & Advocacy.
- By looking at each part of the process, the Wyoming Office of Tourism can assess the campaign for future refinement.



Methodology

- SMARInsights developed and programmed an online survey. National sample vendors provided a link to the survey to potential respondents in WOT's target markets. This methodology allows respondents to view the actual advertising to gauge awareness.
- Markets included in each are:
 - ▣ **Core:** Kansas City, MO; Omaha, NE; Madison, WI; Minneapolis, MN; Milwaukee, WI; St. Louis, MO; Oklahoma City, OK; and Portland, OR
 - ▣ **Chicago**
 - ▣ **Seattle**
 - ▣ **Adjacent:** Salt Lake City, UT; Denver, CO; Billings, MT; Idaho Falls, ID; Butte/Bozeman, MT; Boise, ID; Colorado City, CO; and Rapid City, SD
 - ▣ **National:** All other U.S. markets not included in those listed above
- An online survey was fielded in December 2015 and January 2016 and received 1,555 responses. However, in order for the process to yield more accurate results, the ROI and Visitor Profile processes were combined. Through this, more than 7,700 interviews were conducted to determine incremental travel.
- Upon completion of data collection, the data were cleaned, coded, and weighted to be representative of the population.
- The following summarizes the results of the survey. A copy of the questionnaire used for data collection appears in the Appendix to this report.

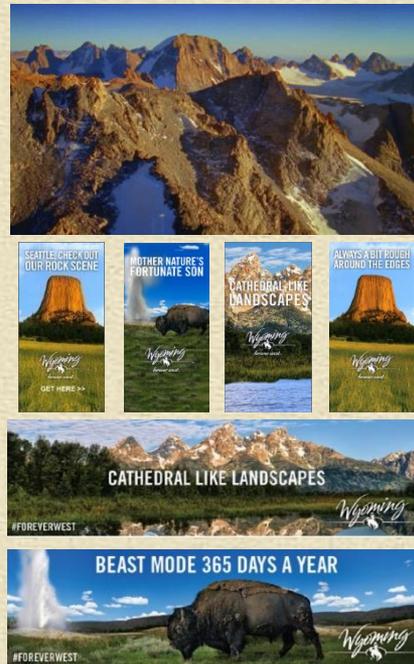
Market	ROI Interviews	Incremental Travel Interviews
Core	321	948
Chicago	327	612
Adjacent	257	1,395
Seattle	304	503
National	346	4,280
Total	1,555	7,738

Campaign Overview

- Wyoming has been placing creative specific to target markets for many years. The Core markets, including Chicago and Seattle, received the three Roam Free TV spots that have been in place for a number of years.
- Seattle was a new target for WOT, with dedicated spending here for all media. TV, digital, and outdoor placed here had messaging specific to the market.
- The Adjacent markets received Road Trip creative, using stylized illustrations for TV, digital, print, and out-of-home.
- Although not included in the incremental travel calculations, creative placed in conjunction with the Disney film *The Good Dinosaur* was included in the wave to evaluate reach.



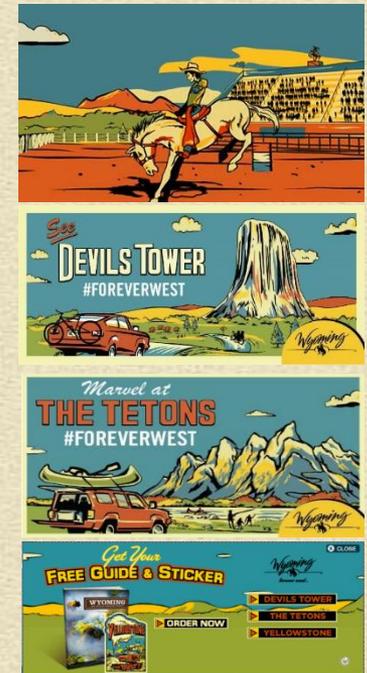
Core Markets



All Markets



Adjacent Markets



Market	2013	2014	2015
Core	\$2,038,853	\$2,005,950	\$1,419,304
Chicago	\$1,209,786	\$1,284,905	\$1,305,708
Seattle			\$654,911
Adjacent	\$1,390,385	\$1,207,410	\$1,218,162
National	\$741,171	\$718,196	\$1,156,090
Total	\$5,380,195	\$5,216,461	\$5,754,175

Insights

- Overall, the 2015 spring/summer campaign had more influenced trips and visitor spending, with \$1.2 billion spent by incremental and repeat visitors. But because WOT spent more to achieve these gains, there was a slight dip in the return on investment. SMARInsights has found that the average return for state destination marketing organizations is \$129. So while the ROI is slightly lower, it is still well above average.

- Given there is not an infinite number of households, ROI is not able to continue to increase exponentially with additional investment. This is especially true for DMOs that are as well established in their media markets as WOT is. Although the ROI may be down slightly, the more important measure is influenced visitor spending, which is up. In the state's visitor profile research, leisure travel nationally was projected to increase 2.5%. Given the campaign increased visitor spending by 6.3%, it is outperforming anticipated visitation increases.
- Nearly 85% of the influenced trips and visitor spending come from national households, those not targeted with specific media, including TV. SMARInsights continues to find that TV drives awareness, as was reviewed in the Wave 1 report of this research. Given the cost of TV, a national campaign was previously not feasible for Wyoming given the budget resources available. But with newer technologies allowing for highly targeted TV placements, this could be an option for WOT to explore.

850,000

Influenced
trips



\$1.2 billion

Influenced
visitor
spending



\$202

Return on
investment



Insights

- Addressable TV was used for *The Good Dinosaur* creative and generated considerable recall. Although it is likely such high awareness is a result of the studio's investment, it points to the viability of this as a national TV platform. In addition to considering new markets for targeted investment, WOT should also consider available platforms for TV delivery.
- The inclusion of Seattle as a spot market is a good example of the potential new markets could hold. While awareness was below that of the established Core markets and costs were higher than average, these would likely fall in line with continued investment. And by entering this new market, WOT had a positive influence on generating incremental travel. SMARInsights sometimes sees little influenced travel from a new market as consumers need time to plan and execute trips. But the level of incremental travel here indicates there was pent up demand from the market. As Wyoming becomes part of the consideration set for Seattle households, incremental travel would likely continue to grow.
- Wyoming has been advertising in the Core and Adjacent markets for more than 10 years. The level of awareness generated in this market has reached saturation, and WOT is not likely to push it higher with continued investment. The lack of incremental travel from these markets is an indication that it is time to invest elsewhere. Certainly a base level of investment is warranted to maintain market share. But in order to continue to influence additional travel, WOT should explore the potential of other spot markets and/or targeted national media.
- Wyoming has consistently developed creative that receives excellent ratings. But the same messages have been in the marketplace for a number of years. When the brand messaging is seen in concert with *The Good Dinosaur* creative, interest in visiting increases significantly. As WOT works with a new creative agency, messages should be crafted for delivery based on the audience and how motivating they are.
- Non-traditional marketing, such as the cross-promotion with *The Good Dinosaur*, is proliferating. This was certainly an opportunity unique to Wyoming. Other sponsorships likely exist that make sense for the state, especially marketing opportunities surrounding the centennial of the National Parks system.



Advertising Awareness Overview

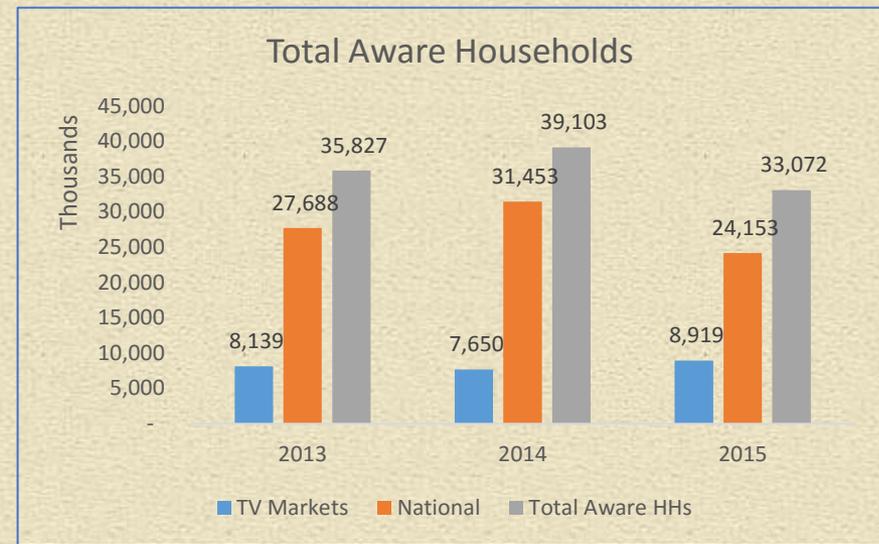
Overall Advertising Reach

- It was encouraging that although awareness among the national audience was lower, the markets that WOT targets with TV – Core, Chicago, Seattle, and Adjacent combined – had an increase in awareness.
- Overall, there were fewer aware households than in the previous two years. Combined with an increase in spending, this resulted in a slightly higher cost per aware household. SMARInsights has been evaluating destination marketing campaigns for many years. With a wealth of data, benchmarks for DMO efforts have been established. For campaigns with a national reach, the average cost per aware household is \$0.29. In total, the Wyoming 2015 campaign had a cost of \$0.17 to reach an aware household, far below the average.

Cost per Aware HH	2013	2014	2015
Qualified HHs	94,445,520	95,656,360	100,234,179
Awareness	38%	41%	33%
Aware HHs	35,826,709	39,102,720	33,072,300
Media Spending	\$5,380,195	\$5,216,461	\$5,754,175
Cost per Aware HH	\$0.15	\$0.13	\$0.17



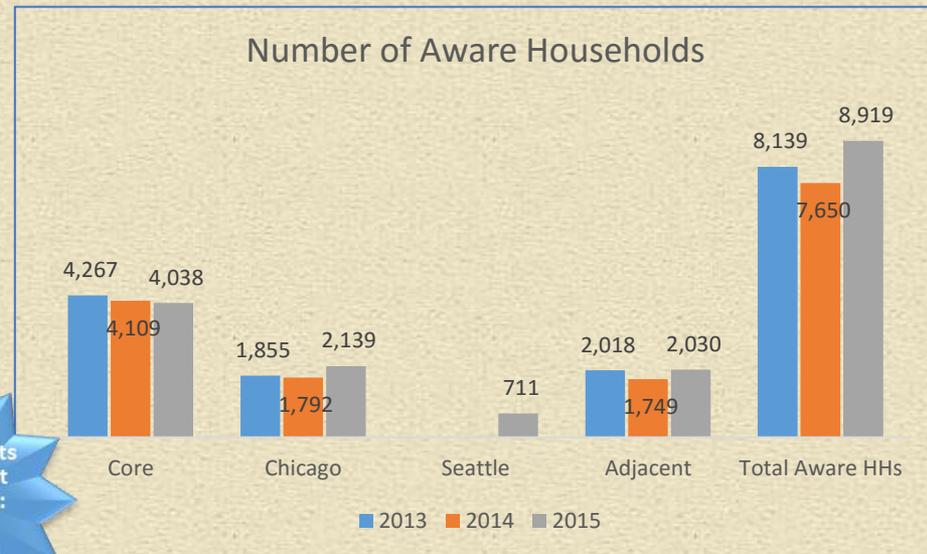
All percentages are rounded



Advertising Reach in TV Markets

- Resources were shifted out of the Core markets to make dollars available to target Seattle. The overall result was an increase in aware households in the TV markets.
- Although the number of aware households in the Core markets was down, it was a slight decrease given the 29% decline in budget. It seems the relocation of resources worked for WOT.

SMARInsights
spot market
benchmark:
\$0.69
per aware
household



TV Markets CPH	Core	Chicago	Seattle	Adjacent	Total
Awareness	62%	70%	45%	66%	63%
Aware HHs	4,038,427	2,139,353	710,989	2,030,480	8,919,249
Spending	\$1,419,304	\$1,305,708	\$654,911	\$1,218,162	\$4,598,085
Cost per aware HH	\$0.35	\$0.61	\$0.92	\$0.60	\$0.52



Creative Review

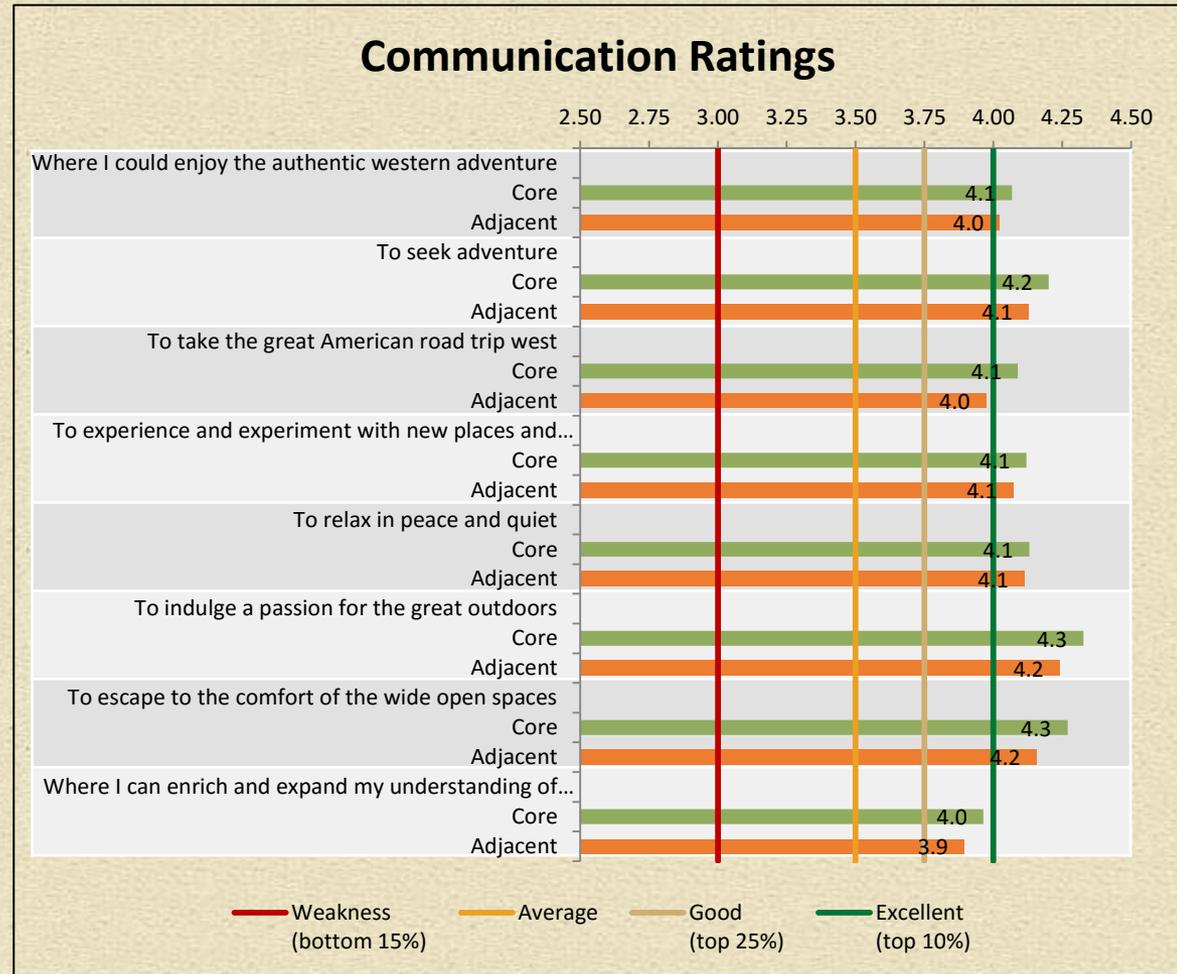
Creative Evaluation

- A campaign must not only generate awareness, but it should also communicate desired messages in order to drive travel. Through the evaluation of hundreds of destination marketing campaigns, SMARInsights has established a number of benchmarks related to advertising creative.
- After viewing all of the ads, respondents were asked to rate attributes using a 5-point scale where 5 = “strongly agree” and 1 = “strongly disagree.”
- There are two types of attributes related to advertising creative – those that communicate particular messages about the destination and those that encourage the consumer to take an action. The benchmarks developed are based on the communication and impact attributes of DMO advertising. However, impact attributes are lower because they have a more difficult time meeting this mark as they require action from a consumer, which is harder than communicating a desired message.

Communication Ratings	Impact Ratings
4.0 Considered Excellent. Rating is in the top 10% of all communication ratings.	3.7 Considered Excellent. Rating is in the top 10% of all impact ratings.
3.75 Goal Rating. Resides in the top 25% of all communication ratings.	3.5 Goal Rating. Resides in the top 25% of all impact ratings.
3.5 Average. Rating is average compared to historic norms.	3.3 Average. Rating is average compared to historic norms.
3.0 Notable Weakness. Rating is in the bottom 15% of all communication ratings.	3.0 Notable Weakness. Rating is in the bottom 15% of all communication ratings.

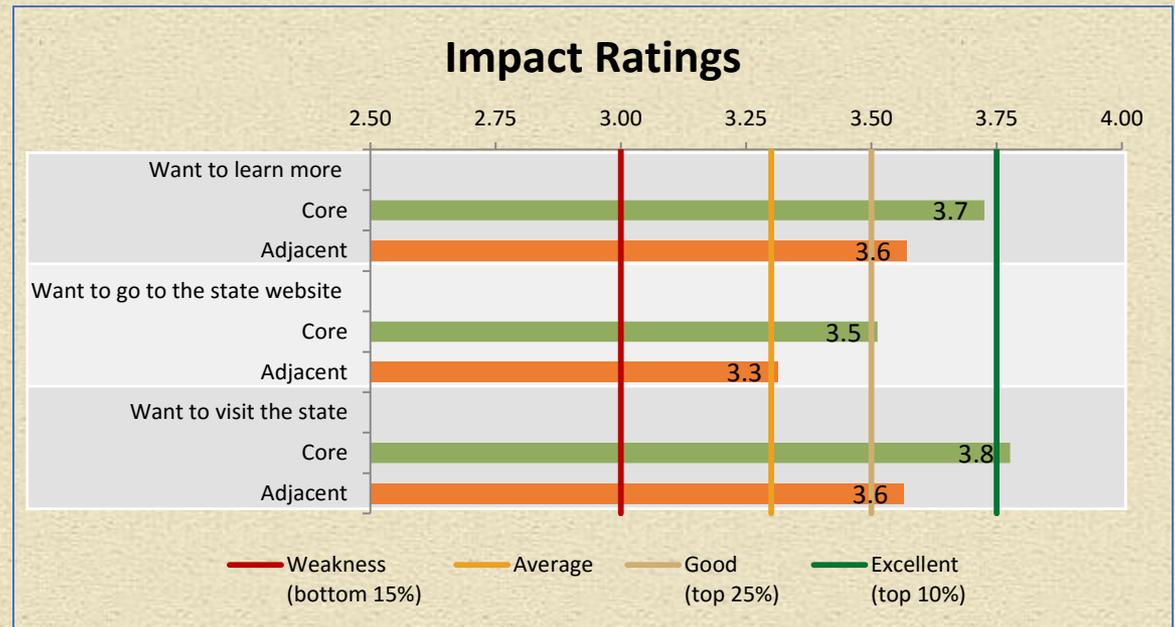
TV Communication Ratings

- SMARInsights has found that TV creative often drives overall ratings for a campaign. Because the TV ads for the Core and Adjacent markets are vastly different, it is useful to compare the evaluations of these audiences. The Adjacent creative is animated illustrations, while the Core TV is live-action footage.
- Both executions perform well, with most in the top 10% of all DMO creative evaluated. But across the board, the live-action Core creative rates better.



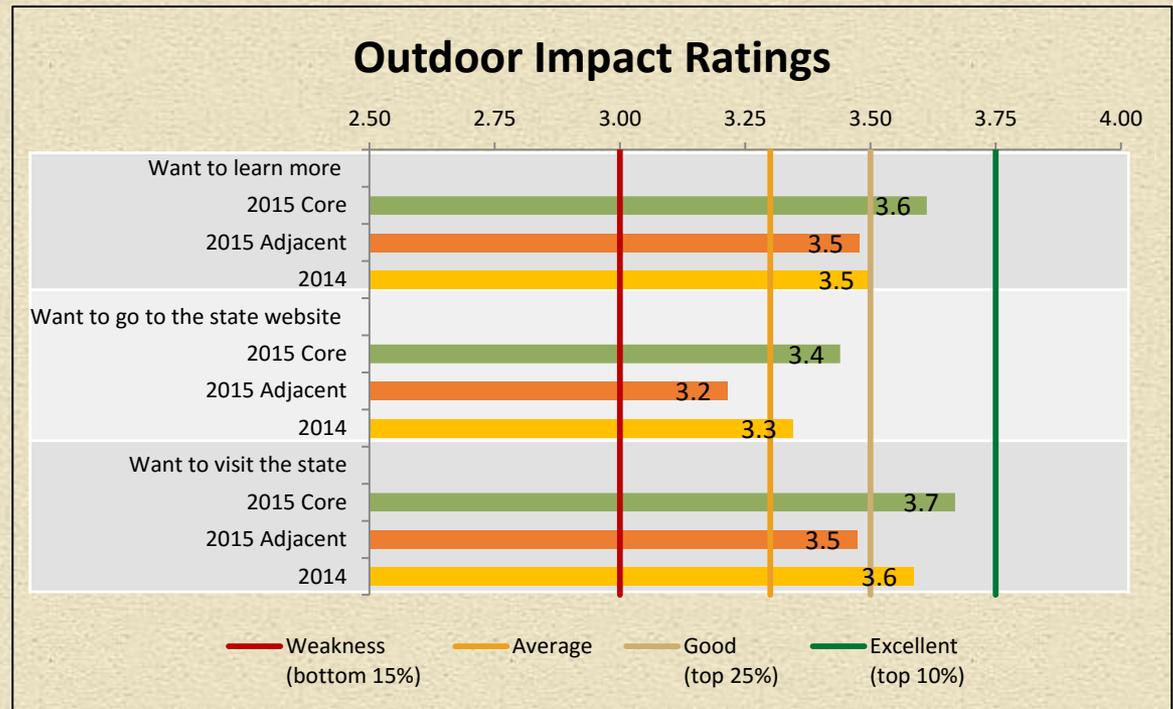
TV Impact Ratings

- A key component to successful destination creative is showing product. The Core TV does this well, with the majestic landmarks of the state featured prominently. However, this does not come across in the Adjacent TV.
- The Adjacent creative falls far short of the Core placements in their impact ratings, especially in generating interest in visiting the state.



Outdoor Impact Ratings

- As mentioned, there was concern in 2014 about the possible wear-out of the outdoor creative. With new executions in the Core markets for 2015, ratings improved.
- But just as with TV, the illustrated placements in the Adjacent markets fall short of the same media using photography of actual product. While the Road Trips campaign and the corresponding “sticker” campaign have been successful in-state and with visitors, the illustrations used in the paid media are not resonating with the target audience and should be reconsidered.



Creative Focus: Trip Motivators

- It's useful to understand the activities visitors are participating in during their trips, but it's also good to know what is motivating them to visit. Destination marketers must strike a balance between what is motivating and what has the most appeal. As WOT works with a new creative agency, what visitors are doing on their trips and what motivates them should play a role in development.
- With an understanding of participation and motivation, Wyoming can craft messages for delivery in a variety of ways.
- Those activities that have both high participation and high motivation are where paid mass marketing such as TV should focus. The smaller audience but high motivation is where paid niche marketing such as targeted magazines and digital should focus.
- Other activities are best marketed through in-destination marketing and this is often handled by partners across the state.

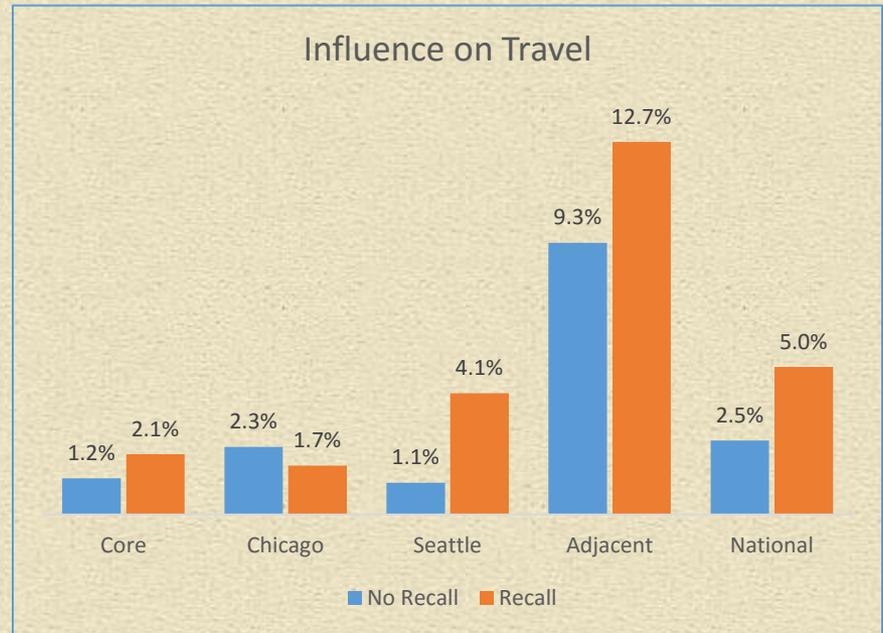




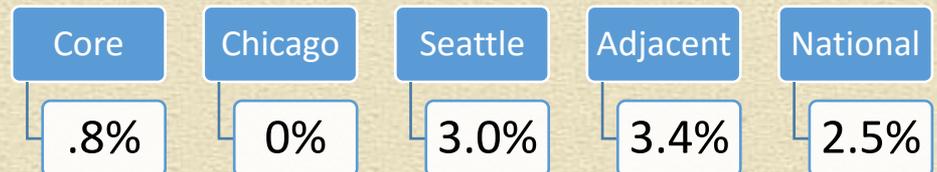
Impact of the Advertising

Advertising's Influence on Travel

- Because there would be visitation to a destination even without any advertising, SMARInsights considers the level of *unaware* travel the base and what the state would have received without any paid media.
- Therefore it is only the additional travel by aware households that is considered influenced by the marketing. If there is higher travel by unaware households, as is the case in Chicago, there are no incremental trips.
- Markets from which there are higher rates of visitation can be more difficult to influence. But it is the nearby Adjacent markets that have both the highest rates of overall travel and the largest increment.
- There was also strong influence from the new market of Seattle. But the National audience has the largest population, so even a small increment can have a big impact.
- The Core markets that have been targeted for many years saw only a slight increase in visitation from aware households.

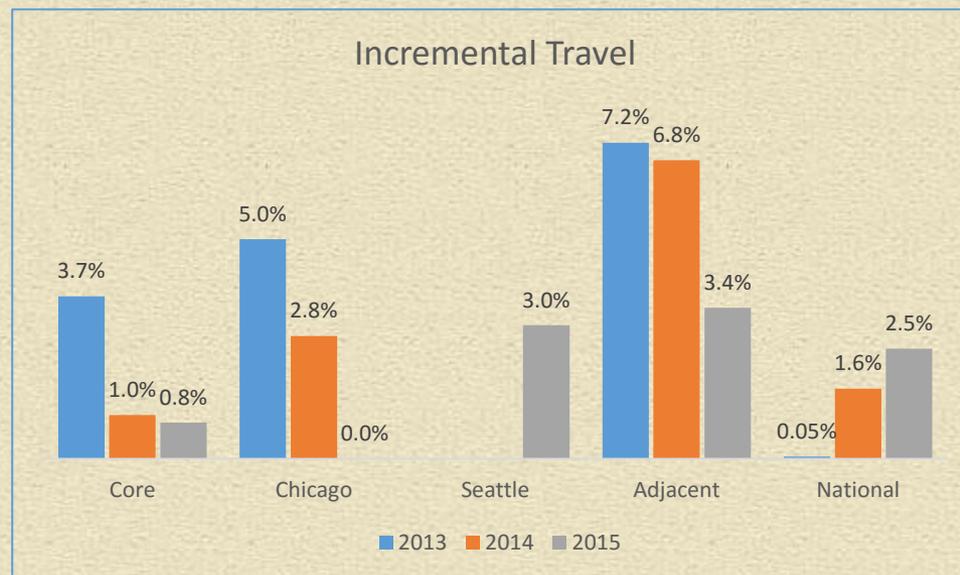


2015 Incremental Travel by Market



Historical Incremental Travel

- The Wyoming Office of Tourism has consistently targeted the Core and Adjacent markets. And while this is positive for generating awareness, it appears it has come to a point of saturation that is no longer generating significant incremental travel. Those who are going to be influenced to visit likely have already done so in these markets.
- These markets may warrant continued investment to maintain market share, but likely resources could be allocated elsewhere. An exception to this would be if the messaging to the established markets were to change significantly. The move to include Seattle in the 2015 campaign was a good one that generated both strong awareness and a good level of incremental travel.



Influenced Trips

- With an increase in increment from the National audience, most of the influenced trips are from this market. Again, given the size of the audience, a small increase in increment results in significant increases in influenced trips.
- The Core markets had tremendous recall of the advertising, but very little influence. Although the creative is excellent, the campaign has been in market for many years. WOT's move to a new creative agency will likely result in updated messaging. If this is the case, additional spending could be warranted, reviving interest in Wyoming. But it seems exploring the potential of other DMAs could be an important step for WOT's continued success.

	Core	Chicago	Seattle	Adjacent	National	Total
Media Recall	62%	70%	45%	66%	28%	33%
Aware HHs	4,038,427	2,139,353	710,989	2,030,480	24,153,052	33,072,300
Incremental Travel	0.8%		3.0%	3.4%	2.5%	2.2%
Influenced Trips	33,314	-	21,625	69,888	605,045	729,873

Repeat Travel

- In addition to generating incremental trips, awareness of advertising can encourage consumers to make repeat trips.
- Only two markets, Seattle and National, had more average trips by aware visitors than unaware. These repeat trips influenced by the advertising added up to an additional 120,000 trips to Wyoming.

Repeat Trips	Seattle	National
Awareness	45%	28%
Aware HHs	710,989	24,153,052
Travel by aware	4%	5%
Aware traveling HHs	29,353	1,215,345
Repeat trips	0.33	0.09
Influenced repeat trips	9,784	110,755

Influenced Travel

- Wyoming's influenced visitation continues to grow, but the origin of those trips has changed dramatically. The Core and Adjacent markets – those receiving dedicated TV spending – previously dominated the influenced trips. But the National markets have dominated influenced trips the past two years, again pointing to the need to redistribute dollars.
- Wyoming's overall visitation grew from 10.1 million in 2014 to 10.5 million in 2015. As seen in the Visitor Profile, the distribution of visitors shifted, with declines from states included in the Core and Adjacent markets and increases from more distant states such as California. By examining the state's market potential in DMAs across the country, Wyoming could target dollars to areas considered the best prospects for a higher return.

Total influence	2013	2014	2015
Incremental trips TV markets	398,300	208,974	124,827
Incremental trips national markets	129,635	500,762	605,045
Repeat trips	133,863	98,396	120,539
Total influenced trips	661,798	808,132	850,412

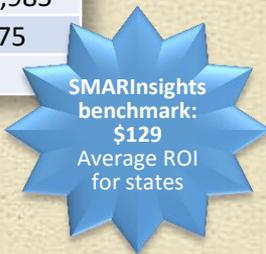


Economic Impact

Overall Impact

- Given the number of influenced trips and the average visitor expenditures (\$1,369 per the 2015 Visitor Profile), the spring/summer campaign influenced nearly \$1.2 billion in visitor spending.
- With media expenditures of \$5.8 million, this returned \$202 to Wyoming for every \$1 invested in the campaign.

	Core	Chicago	Seattle	Adjacent	National	Total
Incremental trips	33,314	-	21,625	69,888	605,045	729,873
Repeat trips			9,784		110,755	120,539
Total influenced trips	33,314	-	31,409	69,888	715,801	850,412
Economic impact	\$45,607,060	\$0	\$42,998,740	\$95,677,194	\$979,930,991	\$1,164,213,985
Media spending	\$1,419,304	\$1,305,708	\$654,911	\$1,218,162	\$1,156,090	\$5,754,175
ROI	\$32	\$0	\$66	\$79	\$848	\$202



Core Impact



- In order to accommodate the introduction of Seattle to the media mix, the investment in the Core markets (excluding Chicago) fell slightly. This resulted in only slightly fewer aware households. But as discussed, years of targeted investment here appears to have brought the market to saturation.
- While the creative placed in the Core markets is excellent, it has delivered the same messaging for many years. Wyoming likely doesn't want to pull out of these markets entirely, but minimal investment to maintain market share is recommended.
- It is possible these markets could receive enough investment through a national buy that could include addressable TV or some other highly targetable medium.

Core	2013	2014	2015
Aware HH	4,266,509	4,108,689	4,038,427
Total impacted trips	216,075	109,120	33,314
Economic impact	\$235,953,861	\$147,857,829	\$45,607,060
Media Spending	\$2,038,853	\$2,005,950	\$1,419,304
ROI	\$116	\$74	\$32

Chicago & Seattle Impact

- The introduction of the Seattle market highlights the need to expand WOT's target beyond the Core and Adjacent markets. There was good awareness for a first-year campaign that would be expected to grow with continued investment. SMARInsights often sees a slight lag in incremental travel as consumers need time to plan and execute trips. However, it appears there was demand from the market as there was a strong increment in the introduction of creative here. Sustained targeting would likely continue to generate a strong increment as Wyoming comes into the consideration set of more consumers.
- Chicago was introduced to the market mix seven years ago. It had been a relatively consistent performer but began to lag in 2014. And though awareness reached an all-time high, those households did not generate any incremental travel. This will likely continue to be an important market for Wyoming. But awareness does not need to be 70% to be effective. Smaller but more targeted investment here could likely generate influenced travel again. But the resources allocated would likely be better distributed elsewhere.

Chicago	2013	2014	2015
Aware HH	1,854,754	1,791,832	2,139,353
Total impacted trips	93,452	49,987	0
Economic impact	\$102,049,827	\$67,732,849	\$0
Media spending	\$1,209,786	\$1,284,905	\$1,305,708
ROI	\$84	\$53	\$0

Seattle	2015
Aware HH	710,989
Total impacted trips	31,409
Economic impact	\$42,998,740
Media spending	\$654,911
ROI	\$66

Adjacent Impact



- The Adjacent markets are Wyoming's loyal visitors. These nearby markets are going to continue to have the highest rates of visitation. But they need something new to get them there. As WOT looks to expand its media footprint, these areas should continue to receive targeted dollars as the messaging needed here varies dramatically from the rest of the U.S.
- And while SMARInsights recommends continued use of TV as a medium to drive awareness across other areas of the U.S., it could be that these markets are so predisposed to visit Wyoming that digital placements could be as effective. Again, market potential modeling could provide WOT an understanding of how much investment would be required to generate continued return.

Adjacent Markets	2013	2014	2015
Aware HH	2,017,703	1,749,129	2,030,480
Total impacted trips	222,636	148,262	69,888
Economic impact	\$243,118,941	\$200,895,537	\$95,677,194
Media spending	\$1,390,385	\$1,207,410	\$1,218,162
ROI	\$175	\$166	\$79

National Economic Impact



- Given similar results in 2014 with the Core and Adjacent markets having less influence than National, WOT significantly increased the budget allocated to national efforts. This resulted in 85% of the trips influenced by the spring/summer media coming from these areas outside of the markets receiving dedicated media. While this was primarily accomplished through digital placements, new technologies could make TV placements possible.
- As reviewed in the Wave 1 report of this research, SMARInsights sees significantly higher rates of awareness by destinations that include TV in the mix. Given affordability of digital, many DMOs are considering moving exclusively to online executions. This is not a path SMARInsights recommends. The rise of highly targeted TV makes national placements far more feasible than even a national cable buy. As WOT develops creative with a new agency, broadcast TV should continue to be part of the mix.
- The national audience that hasn't received targeted Wyoming messaging could have pent up demand for a new destination. With the centennial of the National Parks receiving significant media coverage for 2016, it could be the ideal time to hit this audience with Wyoming TV.

National	2013	2014	2015
Aware HH	27,687,743	31,453,070	24,153,052
Total impacted trips	129,635	500,762	715,801
Economic impact	\$141,560,937	\$678,533,169	\$979,930,991
Media spending	\$741,171	\$718,196	\$1,156,090
ROI	\$191	\$945	\$848

Total Economic Impact



- Wyoming's economy has been hit hard by the decline in oil prices. With this, the state is experiencing significant budget shortfalls. WOT received additional allocation for 2015 in order to expand into the Seattle market. This was a positive move and generated good awareness and increment. For 2016, similar moves should continue to be explored.
- WOT has consistently returned significant economic impact on its leisure marketing, with the 2015 spring/summer campaign generating \$1.2 billion in visitor spending, up 6% from 2014. But with more investment, the ROI fell slightly. But with \$202 returned for every \$1 invested, this is still above the average of \$129 SMARInsights see for state DMOs.
- Given the state's tax rate, more than \$47.5 million was returned to the state in tax revenue, for a tax ROI of \$8.30.

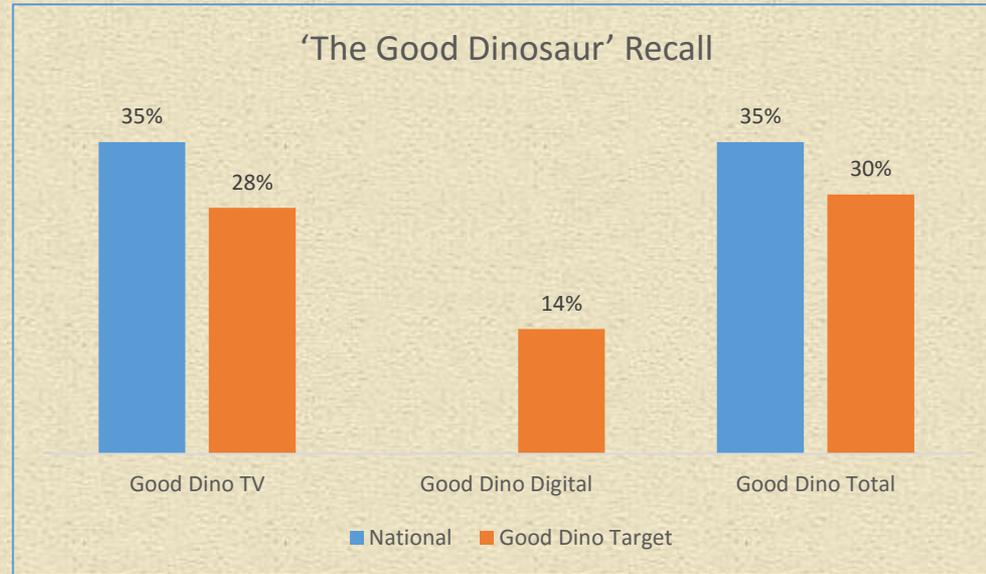
Total Economic Impact	2013	2014	2015
Total influenced trips	661,798	808,132	850,412
Economic impact	\$722,683,566	\$1,095,019,383	\$1,164,213,985
Expenditures	\$5,380,195	\$5,216,461	\$5,754,175
ROI	\$134	\$210	\$202
Taxes generated	\$29,630,026	\$44,895,794	\$47,732,773
Tax ROI	\$5.51	\$8.61	\$8.30



'Good Dinosaur' Recall

'The Good Dinosaur' Awareness

- Wyoming Office of Tourism had the unique opportunity to partner with Disney on the promotion of the animated movie *The Good Dinosaur*. Set in what would be present-day Wyoming, the state promoted seeing the landscapes that “inspired the film.”
- This was supported by national TV via AT&T and U-verse as well as XM radio and targeted digital placements in select markets.
- Recall of *The Good Dinosaur* creative was significant. Given that it is higher nationally than even brand awareness, consumers are likely associating promotion of the film with creative that was not produced and placed by WOT. This is excellent cross promotion in that Wyoming sees the benefits of recall with a fraction of the media expenditures.



Market	Target Households	Awareness	Aware HHs	Media Expenditures	Cost per Aware HH
National	89,597,523	35%	31,806,266	\$300,000	\$0.01
Good Dino Target*	10,636,656	30%	3,141,498	\$76,230	\$0.02
Total	100,234,179	35%	34,947,764	\$376,230**	\$0.01

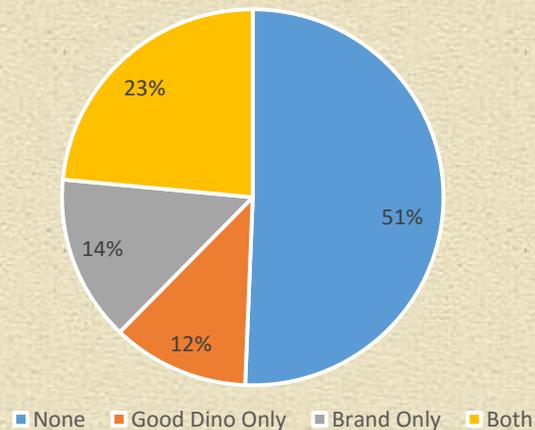
*Chicago, Dallas, Denver, Minneapolis, Salt Lake City & Seattle

** Includes only TV and digital

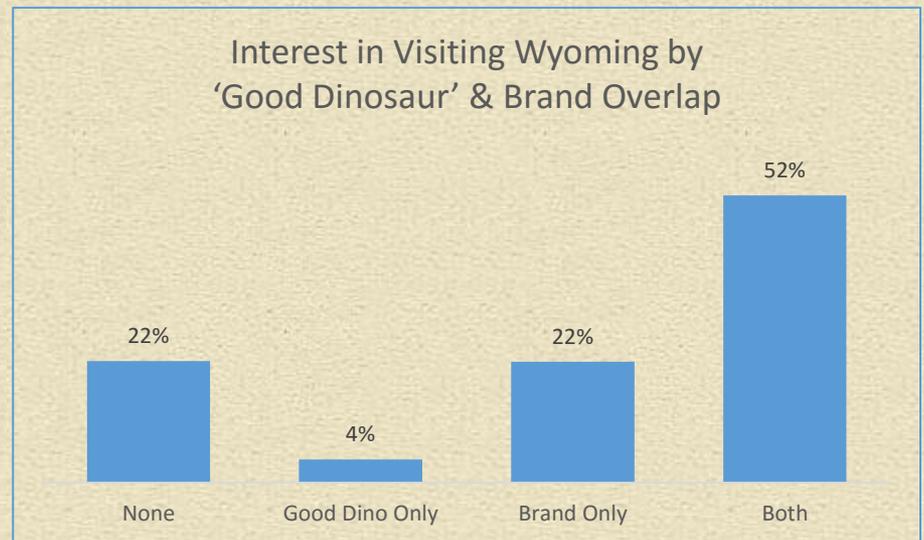
Overlap with Brand Marketing

- These “non-traditional” forms of media are becoming quite popular with DMOs as they move to sponsor programming. SMARInsights has found them to be effective at generating both recall and interest, especially among niche audiences where much of the sponsorship opportunities lie.
- But with *The Good Dinosaur* being a mass-marketed feature film, there is considerable overlap with Wyoming’s brand marketing. Nearly a quarter of households recall both media, and those who recall seeing both were far more interested in visiting the state in the future.

‘Good Dinosaur’ & Brand Media Awareness Overlap



Interest in Visiting Wyoming by ‘Good Dinosaur’ & Brand Overlap





Appendix

Questionnaire

Questionnaire

Wyoming Office of Tourism
Advertising Effectiveness ROI and Visitor Profile
 Nov. 12, 2015

- S1. What is your ZIP code? _____
- S2. Who in your household is primarily responsible for making decisions concerning travel destinations?
 1 Me
 2 Myself and my spouse/partner
 3 My spouse/partner → TERMINATE AT END OF SCREENING QUESTIONS
- S3. Do you normally take at least one leisure trip a year that involves an overnight stay or is at least 50 miles from home?
 1. Yes
 0. No → TERMINATE AT END OF SCREENING QUESTIONS
- S5. What is your age?
 1. Under 18 → TERMINATE
 2. 18-24
 3. 25-34
 4. 35-44
 5. 45-54
 6. 55-64
 7. 65 or older

(ASK UNTIL AD EFFECTIVENESS QUOTA IS COMPLETE)
 INSERT TV AND ONLINE SCREENER

- S4. Are you able to hear and view the video?
 Yes
 NO → TERMINATE AT END OF SCREENING QUESTIONS

END OF SCREENING QUESTIONS

1. Have you visited any of the following states since the beginning of 2015 for a leisure trip that included an overnight stay? How many overnight leisure trips did you take to each state during 2015?

	States visited in 2015 (Select all that apply.)	Number of overnight visits
Colorado		
Idaho		
Kansas		
Montana		
Nevada		
New Mexico		
North Dakota		
Oklahoma		
Oregon		
South Dakota		
Texas		
Utah		
Washington		
Wyoming		
None of these states		

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VISITOR PROFILE: IF DID NOT VISIT WYOMING, SKIP TO ADS AND THEN TERMINATE
 VISITOR PROFILE: WYOMING VISITOR, CONTINUE
 ROI: CONTINUE ON

2. Did you recommend any of these places as trip destinations to your friends, relatives or co-workers? Which ones? (SHOW LIST OF PLACES VISITED FROM Q1)
3. How likely are you to take a leisure trip to any of the following states in the next year?

	Not likely	Somewhat likely	Very likely
Colorado			
Idaho			
Kansas			
Montana			
Nevada			
New Mexico			
North Dakota			
Oklahoma			
Oregon			
South Dakota			
Texas			
Utah			
Washington			
Wyoming			
None of these states			

ROI: IF NON-VISITOR, SKIP TO ADS

4. Please tell us a little more about your 2015 overnight Wyoming trip(s). If you are listing multiple trips, the most we will ask you about is 6. Thinking about ...

	Month of trip (DROP DOWN WITH MONTHS – JAN THRU DEC)	How many nights did you stay? (LET RESPONDENT ENTER NUMBER)	Main purpose was to visit friends or family? Yes or No
Wyoming trip(s) (INSERT TRIP #)			

5. Besides this year, had you visited Wyoming for an overnight leisure trip in the previous five years?
 1. Yes
 0. No - SKIP TO Q6

- 5A. In the past 5 years, how many overnight leisure trips have you taken to Wyoming? _____

[RANDOMLY SELECT WYOMING TRIP SELECTING ONE WHOSE PRIMARY MOTIVATION WAS NOT TO VISIT FRIENDS AND FAMILY FIRST – IF NONE, THEN RANDOMLY SELECT ANY. PLEASE PULL IN MONTH AND LENGTH OF TRIP TO INDICATE WHAT TRIP - EG. 5 NIGHT TRIP IN JANUARY.]

6. Which of the following best describes your visit to Wyoming on your (INSERT LENGTH AND MONTH FROM WYOMING Q4) trip to Wyoming?
 1. Wyoming was my main destination
 2. I was ultimately headed somewhere else, but included a visit to Wyoming
 3. Wyoming was one of several places I decided to visit on this trip

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Questionnaire

7. What other states did you visit on this trip?

[INCLUDE STATE LIST WITH CHECK BOXES INCLUDE
NO OTHER STATES VISITED AT END OF LIST]

8. How far in advance did you begin planning that [INSERT LENGTH AND MONTH FROM Q4] trip to Wyoming?

1. Less than 1 month
2. At least 1 month, but less than 2 months
3. At least 2 months, but less than 3 months
4. At least 3 months, but less than 6 months
5. 6 months or more

9. Prior to your [INSERT LENGTH AND MONTH FROM Q4] trip to Wyoming, which of the following sources did you use to gather information for planning your trip? Select all that apply.

1. Called 800 number to request info
2. Talked to friends and family
3. Used Internet – ASK Q9a
4. Contacted individual attraction or event to request information
5. Contacted individual chamber of commerce to request information
6. Used online travel agency such as Expedia or Orbitz
7. Used online review sites such as TripAdvisor or Yelp
8. Used social media such as Facebook or Pinterest – ASK Q9b
9. Other, please specify _____
10. None of these

9a. Do you use this Wyoming website?



1. Yes
0. No

9b. Did you visit Wyoming's Facebook page?



1. Yes
0. No

10. What method of transportation did you use to travel to Wyoming on your [INSERT LENGTH AND MONTH FROM WYOMING Q4] trip?

1. Drove via car, van, truck or SUV
2. Drove via RV
3. Flew/airplane, please specify airport _____
4. Bus or motor coach trip
5. Motorcycle
6. Other, please specify _____

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12. Including you, how many people were in your travel party? _____

ASK Q13 IF Q12 > 1

13. With whom did you travel...?

- Spouse/significant other
- Child(rcn)/grandchild(rcn): age 0-12
- Child(rcn)/grandchild(rcn): age 13+
- Other family
- Friends/acquaintances

14. What forms of lodging did you use during your trip? (Select all that apply.)

1. Hotel, motel, inn, lodge, bed & breakfast or resort
2. Dude ranch
3. RV park/campground
4. Homesharing/vacation rental, i.e., booked through Airbnb, Homeaway, etc.
5. Condominium or timeshare
6. With friends or family
7. Other, please specify _____

15. Which of the following activities did you participate in during your trip to Wyoming? (Select all that apply.) ROTATE

Hiking or backpacking	Visiting Native American sites	
Visiting a state or national park	Attending a pow wow	
Bicycling or mountain biking	Attending a festival or fair	
Mountain climbing	Attending performing arts (music/theater)	
Rock climbing	Visiting historical sites	
Horseback riding	Attending a rodeo	
Hunting	Visit archeological site	
Camping	Wildlife watching	
Snow skiing or snowboarding	Bird watching	
Snowmobiling	Scenic drive	
Canoeing or kayaking	Sightseeing tour	
River rafting	Golfing	
Boating	Visiting a dude ranch	
Fishing	Visiting hot springs	
Visiting museums	Shopping	
	Gambling	
	Other, please specify _____	
	None of these	

ONLY SHOW THE ACTIVITIES THEY CHOSE ABOVE PLUS NONE AND ASK:

16. Of these activities, please indicate if there were any that were a major influence when you selected the destination for this trip to Wyoming in [INSERT MONTH]. You may choose up to 3.

INSERT WYOMING REGIONS MAP USED IN WYOMING VISITOR PROFILE QR

17. Which of the following regions did you visit during your trip?

1. Central
2. Northeast
3. Northwest
4. Southeast
5. Southwest

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Questionnaire

18. Which of the following places or attractions did you visit?
Select all that apply.

Central Region	Northwest Region (Cont.)
Wyoming Pioneer Museum	Wapiti Valley
Casper	Lander
Fort Laramie National Historic Site	Wyoming Dinosaur Center
Register Cliff	National Museum of Wildlife Art
Independence Rock	Sinks Canyon State Park
Torrington	South Pass City State Historic Site
National Historic Trails Interpretive Center	Thermopolis
Douglas	Other, please specify _____
Fort Caspar Historic Site	
Guernsey Trail Ruins	Southeast Region
Other, please specify _____	University of Wyoming
	Cheyenne
Northwest Region	Laramie
Newcastle	Cheyenne Frontier Days
Devils Tower National Monument	Old West Museum
Sheridan	Rawlins
Gillette	Snowy Range Mountains
Fort Phil Kearney Historic Site	Saratoga
Medicine Wheel Passage Scenic Byway	WY State Capitol
Big Horn Scenic Byway	Wyoming Territorial Prison
Buffalo	Encampment, Medicine Bow National Forest
Other, please specify _____	Other, please specify _____
Northwest Region	Southwest Region
Yellowstone National Park	Museum of the Mountain Man
Grand Teton National Park	Evanston
Jackson Hole	Green River Lakes
Cody	Rock Springs/Green River
Big Horn Mountains	Flaming Gorge National Recreation Area
Buffalo Bill Center of the West	Pinedale
Snake River	Kemmerer
Big Horn Canyon National Recreation Area	Fort Bridger State Historic Site
Wind River Indian Reservation	Fossil Butte National Monument
Snake River Canyon	Arbon
Hot Springs State Park	Star Valley
Riverton	Bridger-Teton National Forest
Cody Night Kildee	Other, please specify _____
National Bighorn Sheep Center	

19. Thinking about your overall travel experience in Wyoming, would you say it was...?

1. Poor
2. Fair
3. Good
4. Very good
5. Excellent

20. To better understand your travel habits, we are interested in finding out the approximate amount of money you and other members of your travel party spent while in Wyoming on your trip in [INSERT MONTH]. Please estimate how much your travel party spent in total on...

Please complete all fields – best estimate is fine. If no expenditures in a category enter a “0”

Lodging/accommodations _____

Meals/food/groceries _____

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Entertainment/attractions _____

Shopping _____

Entertainment such as shows, theater or concerts _____

Transportation such as gasoline, auto rental or flight costs _____

Other _____

Please take a moment to look at the following ads and answer a couple of questions.

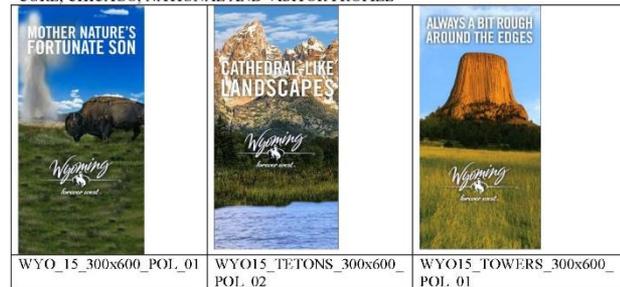
**ROI NATIONAL AND VISITOR PROFILE WILL SEE PRINT AND ONLINE ONLY
ROI CORE AND ADJACENT ADS FOR EACH MEDIUM ARE SPECIFIED IF THEY
ARE DIFFERENT**

PRINT



21. Please mark which print ads you have seen before now. INCLUDE A “None of these” OPTION

**ONLINE
CORE, CHICAGO, NATIONAL AND VISITOR PROFILE**



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Questionnaire

Dino
Good Dinosaur
TV



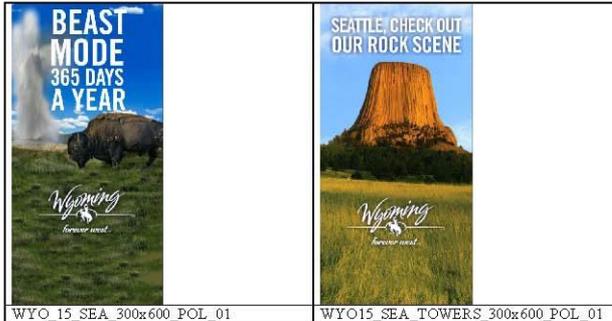
WY_30_WyomingAdventure.mp4
WY_30_WyomingAdventure.jpg
<https://youtu.be/TK79sSOck>

DIGITAL BANNERS



WY-GD-300x600_V3.jpg
<http://www.flashalking.net/vi/ew/1180571/>

SEATTLE



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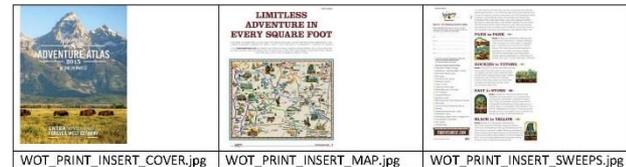
ADJACENT

http://www.pointroll.com/PointRoll/AdDemo/WyomingTourism/WTO_freeguide_300x250_ROL_V2_ex_p_DERIVEPe8.asp

21. Please mark which online ads you have seen before now. INCLUDE A "None of these" OPTION

FOR ROI, SKIP NATIONAL TO DEMOS
FOR VISITOR PROFILE, IF NON VISITOR, TERMINATE
FOR VISITOR PROFILE, IF VISITOR, SKIP TO DEMOS

PRINT INSERT – SHOW ALL ON ONE PAGE



23. I have seen this newspaper insert before
 I have not seen this newspaper insert before

TV

Unlabeled Summer – SHOW ALL



<http://youtu.be/JyRyViAvNlk>

CORE AND CHICAGO

<http://youtu.be/KB4gbWE-hU>
<http://youtu.be/KCnm15Dang>
<http://youtu.be/EiO87zoAizY>

SEATTLE

<http://youtu.be/xBpAEm1IA>

ADJACENT



WY14_WYTV1

<http://youtu.be/Pe5N2iR591I>

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Questionnaire

FOR EACH TV ASK

24. How many times have you seen this television ad?

- Never
- Once
- A few times

OUTDOOR – NOTE FOR ANALYSIS: CHICAGO, KANSAS CITY, MADISON, MINNEAPOLIS, OMAHA, PORTLAND, ST. LOUIS ONLY

CORE AND CHICAGO

 Buffalo OOH.jpg	 Devils Tower OOH.jpg
 Tetons OOH.jpg	 Tetons w Buffalo OOH.jpg

SEATTLE

 Seattle Buffalo OOH.jpg	 Seattle Devils Tower OOH.jpg
 Seattle Tetons OOH.jpg	

ADJACENT

 WOT_ADJACENT_OOH_DEVILS_TOWER.jpg	 WOT_ADJACENT_OOH_TETONS.jpg
--	--

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 WOT_ADJACENT_OOH_YELLOWSTONE.jpg	 WOT_ADJACENT_OOH_RODEO.jpg
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26. Please indicate which of the following outdoor ads you have seen before now. INCLUDE A NONE OF THESE OPTION

The following questions are for classification purposes only, and will help us understand different groups of people.

D1. Are you...?

- Married
- Divorced/separated
- Widowed
- Single/never married

D2. Including you, how many people are currently living in your household? ____ (IF D2=1, GO TO D4)

D3. How many living in your household are children younger than age 18? ____

D4. Which of the following categories best represents the last grade of school you completed?

- High school or less
- Some college/technical school
- College graduate
- Post-graduate degree

D5. Which of the following categories best represents the total annual income for your household before taxes?

- Less than \$35,000
- \$35,000 but less than \$50,000
- \$50,000 but less than \$75,000
- \$75,000 but less than \$100,000
- \$100,000 but less than \$150,000
- \$150,000 or more

D6. Which of the following best describes your racial and ethnic heritage? Are you...? (ALLOW MULTI)

- Caucasian/white
- African-American/black
- Latino/Hispanic
- Asian
- American Indian
- Other (Specify _____)

D7. Are you...?

- Male
- Female

D8. What is your age? _____

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