

# Wyoming Travel and Tourism FY11 – FY12 Strategic Plan

## Contribution to Wyoming Quality of Life Results:

Wyoming Travel and Tourism supports these Wyoming Quality of Life Results:

- Wyoming values the unique aspects of its western heritage, providing residents and visitors expanding access to cultural, historical and recreational experiences.
- Wyoming has a diverse economy that provides a livable income and ensures wage equality. Wyoming Travel and Tourism supports these goals by promoting and facilitating increased travel to and within the state of Wyoming. A healthy tourism economy contributes to business sustainability and strengthens the industry's job and income generation capacity.

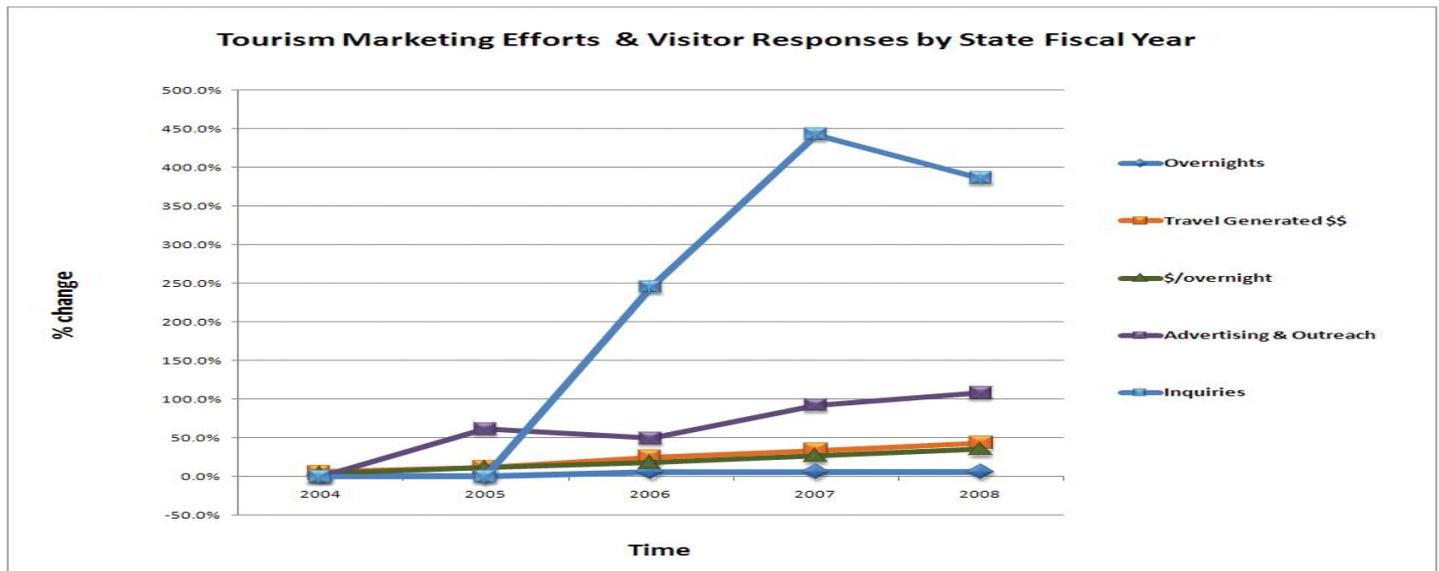
## Basic Facts:

Wyoming Travel and Tourism has twenty full-time staff positions and operates with a biennium budget of \$25,384,532. The funding sources for the budget are 100% general funds.

Programs include sales and marketing efforts in the following areas:

- Advertising, Web and Research
- Domestic Tourism Marketing
- Industry Services
- International Tourism Marketing
- Media and Public Relations
- Film, Arts & Entertainment

## Performance Measure #1:



## Story Behind the Performance #1:

Wyoming Travel and Tourism (WTT) is the agency charged with bringing non-resident visitors to Wyoming by promoting the state as a vacation destination to both domestic and international audiences. The local tourism industry relies on WTT to create an umbrella marketing campaign, promoting Wyoming as an ideal vacation destination and positioning Wyoming against competitive brands as the destination of choice.

Aware consumers are twice as likely to visit as non-aware consumers. Effective advertising and outreach efforts create brand awareness. Once deployed, potential visitors respond to marketing campaigns and are driven to explore Wyoming vacation planning information through the website, call center and publications (inquiries). As WTT's advertising and outreach efforts increase, so has the volume of inquiries as a result of those efforts. An increase in inquiries is a direct result of increased awareness which is a result of increased and consistent messaging in the marketplace. While

advertising and outreach grew by 108% from FY04 to FY08, during that same time inquiries grew by four times that much. One should note that the shift in the national economy in 2008 clearly affected consumers' confidence which is evidenced by the drop in inquiries in FY08 over FY07.

Awareness about a destination leads to inquiries and in turn, inquiries lead to actual visits. Actual visits are measured in overnights (i.e., 10 overnights could be measured as one visitor staying for 10 nights, or 10 visitors staying for one night) which generates direct travel-generated sales on such things as shopping, accommodations, gasoline and fuel, food, entertainment and recreation, just to name a few. Increasing the number of visitors and/or extending their length of stay are both growth factors in a healthy, sustainable tourism economy.

By creating and implementing a fully integrated marketing campaign, WTT builds business potential for Wyoming constituents who operate tourism-related businesses and services, adding strength to the Wyoming travel industry . . . an industry predominantly made up of small, independent businesses. The four year trend analysis indicates that it's working. While the number of overnights has grown by nearly 6%, the expenditures per overnight have grown at seven times that rate.

It is important to note that Wyoming's tourism industry is subject to outside influences over which the division has no control. Natural catastrophes (fires; floods) and global issues (terrorism; housing market; presidential elections; gas prices) can have a profound impact on people's ability and willingness to travel. As was evidenced during the summer of 2008 when Americans experienced unprecedented gas prices and then the fallout of the financial markets in early fall, the fluctuations in the national economy had an adverse effect on the travel industry. And, Wyoming's travel industry felt the effects of this major change. While travel generated spending increased slightly over the prior year, there was no marked increase in travel-generated tax receipts, where normally there would be a correlation. This is directly attributable to the price of gas. While consumers spent more on gasoline and it contributed to their overall trip expenditures, the high price of gas drove down consumption. Because the fuel tax is based on quantity and is not related to the price per gallon, there was no real increase in overall tax receipts. However, in a time of economic turmoil, even slight increases are positive results.

### **Improving the Performance #1:**

Over the next two years, Wyoming Travel and Tourism proposes the following to grow Wyoming's tourism industry:

1. Deepen the use of research for strategic decisions:

- Utilize the brand development index (BDI), both web and fulfilled leads, to measure Wyoming's message penetration in the marketplace and determine market performance.
- Conduct intermittent behavioral based research to determine mind-set and motivations for driving consumers' travel decisions.
- Engage in data mining to gain additional knowledge about Wyoming travel consumers and to further communicate the Wyoming vacation experience.
- Encourage tourism industry partners to more fully utilize cooperative research programs to increase their knowledge regarding visitor demographics, consumer analysis and evaluation of marketing materials.

No additional cost outside standard budget.

2. Enhance consistency and distribution of advertising message:

- Expand number of ad aware households by 5% in markets that present the greatest propensity for travel to Wyoming.
- Leverage paid media buys by 20% for value-added enhancements, such as access to consumer databases, web links, cross-promotional opportunities, etc.
- Strategically add new markets, make market adjustments, as evidenced by BDI research.
- Maintain a minimum of 45% ad effectiveness rating.
- Achieve an annual increase of 20% in total number of inquiries.
- Strengthen online marketing efforts by steering online activity throughout the site versus sending consumers directly to the guide order page. Utilize new reporting tools (view-thru metrics) that allows for tracking of consumers activities to and thru the site beyond the initial exposure of the online ad. Achieve a 10% increase, per campaign, in post impression activity. Develop new creative to more fully engage the online consumer.

- Maintain online marketing efforts in the following categories: paid search and banner sponsorships.
- Expand Wyoming’s online communications by increasing the number of e-newsletter subscribers by 20%.
- Utilize social marketing networks (i.e. YouTube, Twitter, Blogs, Flickr, Facebook) to build Wyoming communities online and to support online communications efforts.
- Increase annual web session by 20%.
- Increase annual establishment referrals (click thru from the WTT website to a Wyoming tourism-related business website) by 20%.

No additional cost outside standard budget.

3. Enhance the planning tools to meet/exceed the expectations of the today’s consumer:

- WTT website(s)
  - Continue to incorporate new and emerging technologies into wyomingtourism.org, wyoming4kids.org and filmwyoming.com so as to maximize the online user experience, resulting in increased visitation, filming or learning about Wyoming.
  - Enhance online mapping tool by providing additional, more interactive information.
  - Continually collect user feedback (both industry and consumer) to determine site improvements to make the site more navigable and attractive to consumers.
  - Utilize the WTT video library to upgrade the amount and quality of available video on the WTT website.
  - Enhance user generated content by providing a forum in which users can more efficiently and quickly communicate with other users. Increase the speed in which users can share images and video.
  - Continue to improve WTT’s electronic communications capabilities, including targeted messaging through better database segmentation.
  - Enhance the mobile version of the WTT website by offering maps, video, tours and other relevant tourism information feeds accessible through mobile devices.
- Publications
  - Begin discussions with the industry about changing the *Wyoming Travelers Journal* into more of a picturesque lure piece while directing visitors to the WTT website for business listing information. Conduct consumer research to guide changes and improvements.
  - Continue to increase the usefulness of the *Wyoming Travelers Journal* by providing more information on “what to do after you are here.”
  - Better integrate the *Wyoming Travelers Journal* content and design with the WTT website resulting in a seamless functionality between the two planning tools.

No additional cost outside standard budget.

4. Expand media relationships and product offerings:

- Improve travel media tracking and dollar equivalency values of Wyoming coverage to reach a 10 to 15 percent increase in circulations and media dollar equivalencies.
- Develop 25 “new media” opportunities via travel websites, blogs and web-based writers.
- Generate timely video features monthly for Wyoming tourism website, YouTube, and other web distribution outlets.

No additional cost outside standard budget.

5. Strengthen Wyoming’s competitive position in the International marketplace:

- Expand the “Real America” brand by participating in projects with Rocky Mountain International (RMI); grow Scandinavian marketing efforts by adding Finland to the current mix of targeted countries; and brand Wyoming’s Australian trade efforts with RMI.
- Participate in sales and training missions; educate international tour operators about niche tourism product and unique visitor opportunities outside of the traditional visitor destinations.
- Continue utilizing ads that are effective in the international markets and support advertising in the US Travel Association endorsed USA travel guide published in six languages and distributed in 17 countries.
- Utilize electronic mediums to allow further penetration of Wyoming’s images to international media and travel trade.
- Work with new and existing research vendors and other stakeholders to identify and implement collection methods to measure international visitation; establish benchmarks.

- Continue educating Wyoming suppliers on how to successfully work with international tour operators and the potential benefits.
- Strive to maintain current international visitor numbers, even in tough economic times, and work to grow length of stay by promoting activities and attractions in and around Wyoming communities.

No additional cost outside standard budget.

6. Maximize return-on-investment from participation in travel trade and direct marketing programs:

- Respond to the changing demands of the group travel industry with innovative ways in which to package and present Wyoming product.
- Continue participation in the most productive domestic consumer travel shows to reach markets that align with BDI research.
- Continue educating domestic tour operators on the latest Wyoming product offerings.
- Strive to maintain current domestic visitor numbers, even in tough economic times, and work to grow length of stay by promoting activities and attractions in and around Wyoming communities.

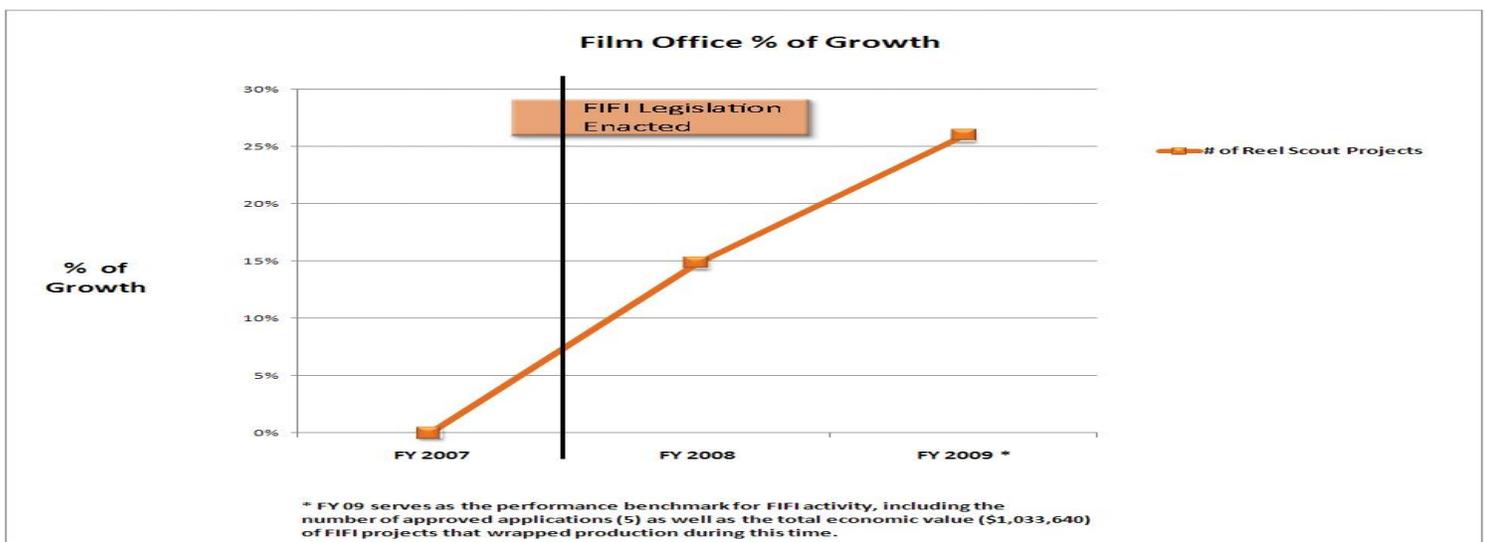
No additional cost outside standard budget.

7. Make Wyoming more visitor-friendly and easily accessible by providing interpretive travel information and quality service:

- Continue to develop Welcome Center personnel through annual training and familiarization tour (Fam) including training newly hired staff for the new NE Wyoming Welcome Center.
- Continue to work with Wyoming Department of Transportation to add directional and interpretive signage and pullout improvements along Wyoming highways.
- Continue In-State Tourism Marketing Education by providing ongoing marketing workshops and training programs to local destinations including customer service, a professional certification program for frontline employees, and a technical assistance program.
- Support efforts of State Parks and Cultural Resources to upgrade state-owned assets.
- Develop a tourism master plan with an emphasis on product development to provide the framework for the development of a formal tourism policy.
- Continue to work with A&I Capital Construction Division and Wyoming Department of Transportation (WYDOT) for the opening and maintenance of the newly built NE Wyoming Welcome Center.
- Secure funding for the construction of a combined Welcome Center, Rest Area and space for the division's offices, to be located at I-25 and Speer Road, south of Cheyenne.

Additional biennium capital construction budget request of approximately \$16 million (will be amended upon completion of Level III design).

**Performance Measure #2:**



## **Story Behind the Performance #2:**

The purpose of the Wyoming Film Office is to promote Wyoming locations as settings for film production. When production companies film in Wyoming, they contribute to the economic vitality of that local community and to the state as a whole. Production companies purchase goods and services from local businesses, including everything from accommodations, food and beverage, hardware and lumber supplies, equipment rental and more. They also employ local crews ranging from just a few to hundreds. Film production also contributes significantly to Wyoming's tourism economy by enhancing the public visibility through television, DVD and motion picture distribution.

The cornerstone of the Wyoming Film Office, the Wyoming Film Industry Financial Incentive (FIFI), is a program that was developed to provide the entertainment industry a financial incentive program and to authorize incentives for qualified film productions. FIFI legislation was passed by Wyoming's 57<sup>th</sup> Legislature and enacted into law in February 2007.

Film incentive programs are very prevalent nationwide. While Wyoming's entrée into this competitive arena has only been in existence for two years, through marketing and promotion efforts, awareness about location opportunities, the incentive program and the increased number of qualified work force has expanded interest in filming in Wyoming. Inquiries into the Film Office are fulfilled through a website packaging program called "Reel Scout." By utilizing the web-based Reel-Scout database, the Film Office can increase the number of digital images and location packages offered to production companies through online mechanisms. The database combines a comprehensive contact management system containing project and client data with the digital library to create online, customized, URL packages. These packages are accessed by the location scout and production studio representatives via a short, personalized e-mail message – thus avoiding the transmission of large image files and text descriptions. The system allows the Film Office to track requests from production companies including the status of projects, locations scouted and city or county statistics to measure usage. From FY07 to FY09, the number of Reel Scout location packages distributed has grown by 26%.

And, it was in FY09 that the FIFI program began to show concrete production activity. In addition to the film incentive program, the continued development of qualified workforce has added to Wyoming's appeal as a filming location. In FY09, five qualified FIFI applications were submitted and approved for incentive funds. Of those five applications, three projects wrapped production. Those three projects estimate total direct expenditures of \$1,033,640 for the purchase of Wyoming goods and services. FY09 serves as the performance benchmark for FIFI activity, including the number of applications as well as total economic value of productions while filming in Wyoming.

## **Improving the Performance #2:**

1. Over the next two years, the Wyoming Film Office proposes the following to expand Wyoming film-friendly offerings:

- Market the Film Industry Financial Incentive (FIFI) program.
- Recruit one large budget project or two smaller budget projects to utilize FIFI funds and Wyoming locations.
- Continue to promote the annual Wyoming Short Film Contest.
- Continue to develop crew/equipment resources.
- Utilize Reel-Scout and Reel-Crew databases to increase the digital images and production resource options offered online.
- Increase annual film location inquiries by 100%.

No additional cost outside standard budget.