



2015 Overnight Visitor Profile Research

February 2016



Background & Methodology



The 2015 Visitor Profile research focused on overnight visitors to Wyoming.

- The goals of the research were to:
 - Track information on visitors and trips to Wyoming, including mode of travel, accommodations, attractions and sites visited, duration of travel, and expenditures;
 - Explore where visitors come from, where they go in the state, and what they do while visiting;
 - Identify key motivators for visitation; and
 - Provide information that will assist in marketing efforts.
- An online survey was conducted among a national audience to determine incidence of travel and to gather information on visitors and their trips. The focus was on overnight trips only. For 2015, a total of 7,738 surveys were conducted. There were 513 households that reported travel to Wyoming, with some reporting multiple trips. Overall, data were gathered on 959 trips to Wyoming.
- Surveying was conducted in December 2015 and January 2016 to gather information on trips throughout the year. The survey was conducted in conjunction with the advertising effectiveness research to provide more data and enhanced information.

Executive Summary



- Overnight leisure tourism continued to grow in 2015, reaching 10.5 million visitors, a 4% increase in overnight leisure visitors. Wyoming's growth continues to outpace the national average.
- Visitor origin remains broad. While nearby states are still major sources of visitation, several more distant states are in the top producers – including California and Texas.
- Trip planning duration has gotten shorter.
- Wyoming is the main destination for half of trips.
- An interesting piece of the visitor profile is those who travel to Wyoming with children, who represent more than a quarter of visitors. Compared to other visitors, these family travelers are more likely to make Wyoming their main destination (as opposed to a stop on a longer journey), visit more destinations in Wyoming, participate in more activities, and spend more in the state.
- Wyoming's marketing messaging is having an impact on the overall visit experience. Those aware of the ads do more in the state, are more satisfied with their experience, and are more likely to return.

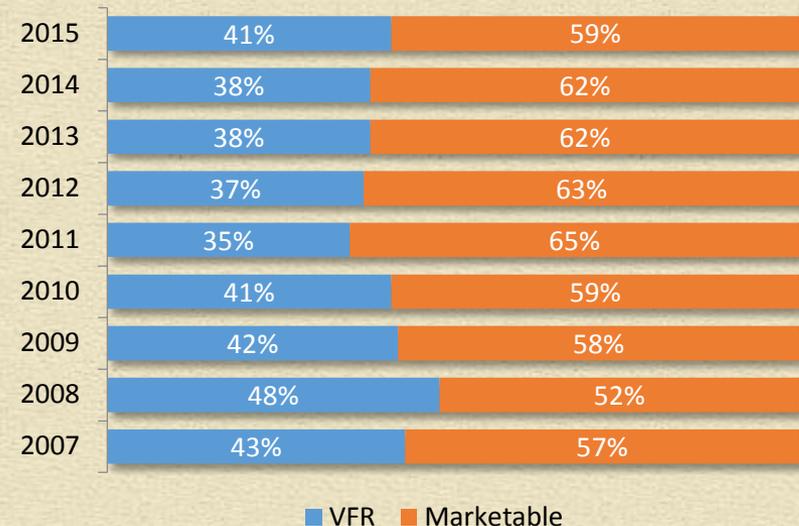
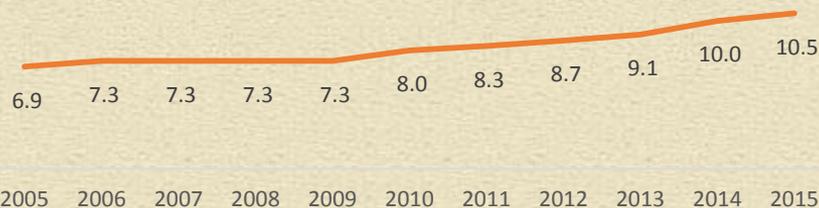
Overnight Visitors & Trip Types



- For Wyoming, overnight leisure tourism continued to grow in 2015, reaching 10.5 million visitors. This represents a 4.2% increase in overnight leisure visitors.
- Actual national travel information has not been released, but projections (U.S. Travel) were for a 2.5% increase in leisure travel in 2015. Therefore, Wyoming experienced stronger growth than the national average.

- Marketable trips represent more than half of all trips, which represents a slight year-over-year decline but nevertheless suggests that Wyoming's marketing efforts are helping to motivate travel.

Overnight Leisure Travel to Wyoming
(in millions)



New Visitors



- New visitors – those who have not visited Wyoming before or whose most recent visit was more than 5 years ago – are an important part of growing the state’s tourism business.
- This year, more than a third of the marketable trips were by new visitors. Although this is a strong percentage, it is a slight downturn from 2014. As the economy has stabilized, people are continuing to travel and that is bringing new visitors to Wyoming.



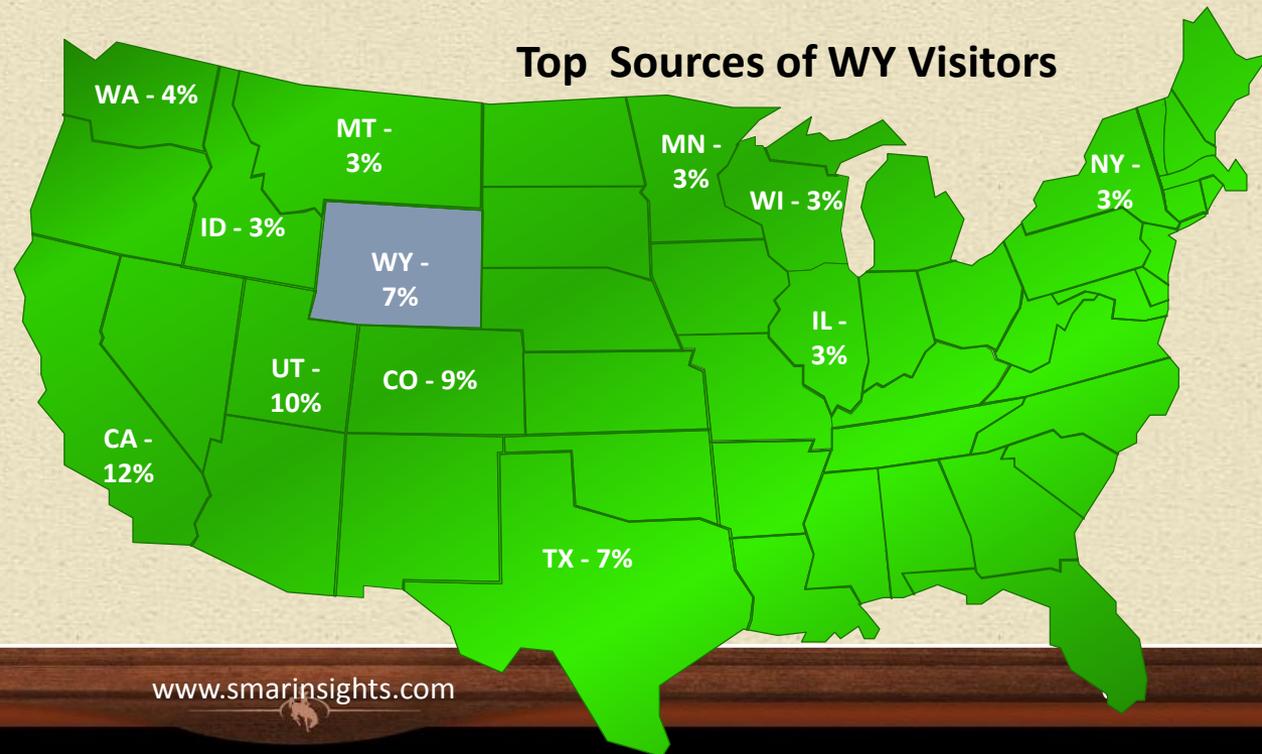
New Visitors	2007	2008	2009	2010	2011	2012	2013	2014	2015
All Overnight Trips	39%	30%	35%	34%	36%	49%	40%	35%	34%
Marketable Trips	46%	38%	41%	39%	39%	55%	44%	44%	39%

Visitor Origin



- With the increase in visitation to the state, the origin of visitors remains broad. Nearby states are still major sources of visitation, but California and Texas continue to be among the top producers of visits.
- Relative to these other states, Wyoming represents a smaller percentage of travelers – but this is generally because travel has grown overall, especially from more distant states.

State	2012	2013	2014	2015
California	11%	6%	8%	12%
Utah	5%	6%	6%	10%
Colorado	14%	12%	12%	9%
Texas	3%	6%	11%	7%
Wyoming	9%	10%	5%	7%
Washington	2%	3%	6%	4%
Illinois	4%	5%	8%	3%



Visitor Origin



- A review of the top DMAs that generate travel shows the continued importance of Denver and Salt Lake City.
- Los Angeles is the next highest producer of visits, emerging as a potentially important target for marketing messaging. New York City and Chicago each produced a solid level of visitation, although Chicago is down from 8% in 2014. Likewise, Seattle's visitation level moved downward from nearly 4% last year, despite marketing aimed at this DMA.
- Nevertheless the wider national market remains important.

City	%
Salt Lake City, UT	10.0%
Denver, CO	8.4%
Los Angeles, CA	7.3%
New York, NY	4.4%
Chicago, IL	4.0%
Minneapolis-St. Paul, MN	3.6%
Rapid City, SD	3.0%
Billings, MT	2.9%
Casper, WY	2.7%
Rochester-Mason City-Austin, MN-IA	2.7%
Seattle-Tacoma, WA	2.2%
Houston, TX	2.1%
Colorado Springs, CO	2.1%

Planning Time Frame



- Trip planning duration has shortened, reflecting an overall trend in travel with the continuation of travel apps aimed at making last-minute booking easier. There are also fewer incentives for long-term booking than there used to be.
- Adjacent markets continue to lead in short-term planning, with a third of marketable Wyoming trips planned within a month of travel.

Time Frame	2008	2009	2010	2011	2012	2013	2014	2015
Less than 1 month	34%	33%	39%	31%	28%	18%	21%	24%
At least 1 month, but less than 2 months	19%	25%	18%	16%	21%	13%	17%	24%
At least 2 months, but less than 3 months	15%	11%	12%	15%	17%	23%	21%	20%
At least 3 months, but less than 6 months	15%	18%	14%	25%	22%	26%	21%	17%
Six months or more	18%	13%	17%	14%	12%	19%	20%	15%

Marketable Trips

Information Planning Sources



- The Internet is still the leading source for Wyoming travel information, although relatively fewer households relied on the Internet in general. This is likely due to the focused use of online review sites and online travel agencies, rather than general Internet searches.
- Of those who used the Internet to plan their Wyoming trip, half (49.5%) visited the Wyoming tourism site. This equates to more than a third (38.1%) of all Wyoming travelers who visited the site. Nearly half (46.8%) of those who used social media to plan their Wyoming trip had visited the Wyoming tourism Facebook page.
- Among “other” information planning sources, traditional (non-online) travel agents and AAA were common responses.

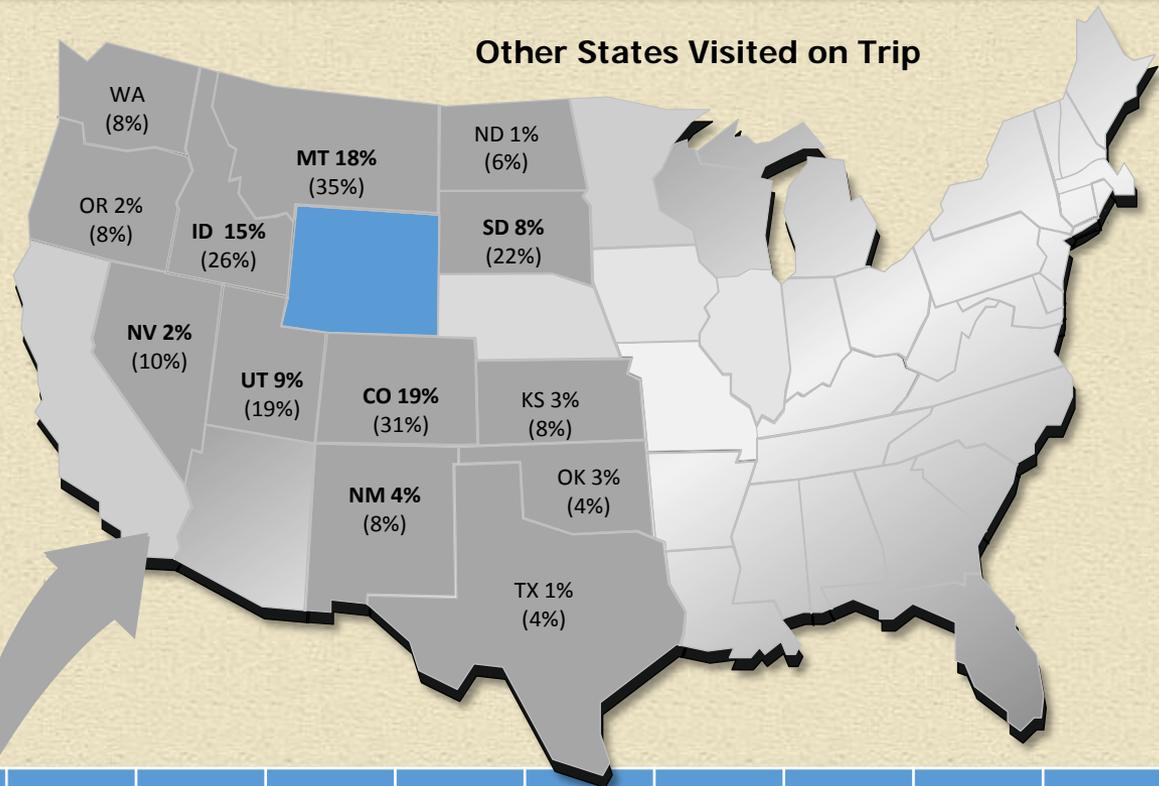
Activity	2012	2013	2014	2015
Used Internet	88%	83%	85%	77%
Online review sites (TripAdvisor, Yelp)			35%	33%
Talked to friends and family	35%	26%	33%	30%
Online travel agency (Expedia, Orbitz)			21%	19%
Individual attraction or event to request information	17%	19%	21%	16%
Called 800 number to request info	7%	11%	7%	10%
Social media			9%	9%
Individual chamber of commerce to request information	7%	4%	7%	5%
Other	5%	7%	3%	6%
None	4%	12%	4%	9%

Marketable trips

Destination of Trip



- For roughly half of the visitors, Wyoming is the main destination. Among visits from adjacent markets, nearly two-thirds (68%) say Wyoming is the main destination. Nationally, the figure is 52%.
- The map shows other destinations visited during marketable trips where Wyoming was the main destination. (Numbers in parentheses show totals, whether Wyoming was the main destination or not.)

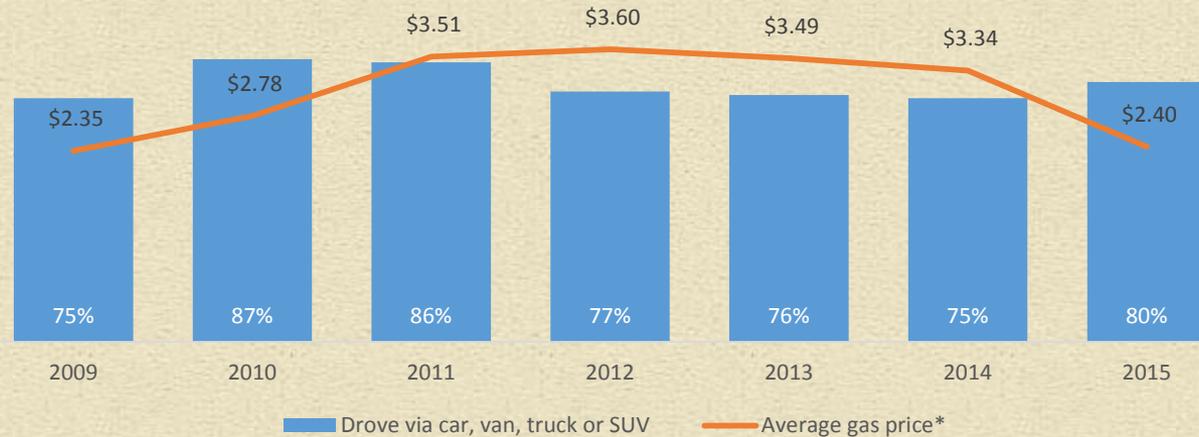


Trip Destination	2007	2008	2009	2010	2011	2012	2013	2014	2015
Wyoming was my main destination	42.1%	50.3%	49.4%	52.3%	59.5%	58.7%	49.5%	51.1%	50.0%
Headed somewhere else, but included Wyoming	14.6%	20.8%	25.4%	18.0%	20.1%	19.9%	22.0%	20.2%	20.8%
One of several places I decided to visit on this trip	43.7%	28.9%	25.2%	29.7%	20.4%	21.4%	28.5%	28.8%	29.2%

Mode of Transportation



- Consistent with prior measures, the majority of Wyoming visitors drive a car, van, truck or SUV to the state. As shown in the graph, the decline in gas prices is directly related to the uptick in driving.
- In years when air travel is up, auto travel declines and vice-versa. Other modes of transportation remain negligible.



Mode of Transportation	2009	2010	2011	2012	2013	2014	2015
Drove via car, van, truck or SUV	75%	87%	86%	77%	76%	75%	80%
Flew/airplane	21%	9%	8%	23%	17%	16%	11%
Drove via RV	5%	6%	5%	4%	3%	4%	6%
Bus or motor coach trip	0%	2%	1%	2%	2%	3%	2%
Motorcycle	0%	1%	2%	2%	2%	1%	1%

* Average gas price from AAA Daily Fuel Gauge Report

Trip & Party Specifics for Marketable Trips



- Trip length remained in the 2- to 3-night range. The 2015 trips were shorter than has been seen in the past few years.
- Travel party size, however, is the highest it has been since 2012. While spouses/significant others continue to lead in travel party composition, children are less prevalent in travel parties than last year.

Trip Specifics	2007	2008	2009	2010	2011	2012	2013	2014	2015
Average duration of trips	3.0	3.1	2.0	2.6	2.7	2.9	3.1	2.7	2.5
# people in travel party	3.9	3.7	4.2	3.2	3.4	3.2	2.9	2.7	3.2
% with children on trip	40%	28%	40%	25%	30%	24%	23%	28%	27%

Travel Party	2012	2013	2014	2015
Spouse/significant other	72%	79%	81%	81%
Child(ren)/grandchild(ren): 0-12	21%	15%	26%	19%
Child(ren)/grandchild(ren): 13+	9%	18%	20%	17%
Friends/acquaintances	20%	13%	13%	14%
Other family	25%	11%	12%	13%

Trip Destinations for Marketable Trips



- The top-tier destinations within the state are consistent over time: Yellowstone, Jackson Hole, and Grand Teton.
- Although there are year-over-year shifts in visitation to second-tier Wyoming destinations, generally these remain consistent as well.
- Ad awareness and the presence of children on the trip both positively impact the number of places visited in the state.

Destination	2010	2011	2012	2013	2014	2015
Yellowstone National Park	47%	50%	49%	50%	54%	49%
Jackson Hole	33%	38%	37%	40%	41%	40%
Grand Teton National Park	36%	38%	40%	39%	41%	38%
Cody	13%	19%	15%	17%	24%	16%
Cheyenne	18%	29%	17%	22%	14%	14%
Casper	14%	20%	14%	11%	7%	13%
Snake River	13%	15%	15%	18%	12%	12%
Big Horn Mountains	9%	10%	7%	14%	7%	11%
Buffalo Bill Center of the West	11%	9%	6%	12%	10%	11%
Laramie	10%	21%	12%	11%	11%	10%
Devils Tower National Monument	13%	18%	9%	16%	11%	10%
Big Horn Scenic Byway	10%	11%	9%	8%	9%	10%
Buffalo	5%	4%	4%	6%	9%	8%
Thermopolis	6%	7%	5%	5%	7%	5%
Wyoming Dinosaur Center	5%	3%	3%	5%	11%	3%
Wapiti Valley	3%	1%	1%	3%	8%	1%
Average # places visited	3.0	3.1	3.5	4.4	4.0	4.2



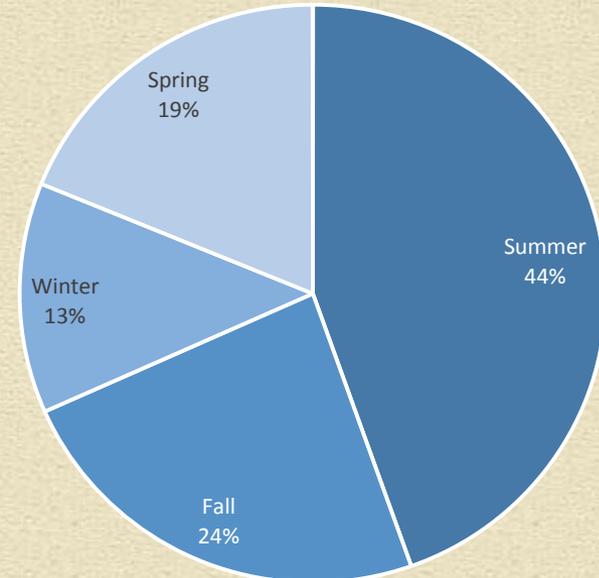
Seasonality & Lodging



- Marketable trip distribution throughout the year remained fairly consistent with 2014, with the highest volume in summer, followed by fall.
- Hotels and motels continue to lead among accommodations, with RV parks/campgrounds holding steady as the second most common accommodation type. Homesharing saw a sizable year-over-year increase, although it remains a small percentage of overall lodging. Travelers visiting with children are more likely to have used homesharing to book their accommodations; 10% of family travelers used homesharing.

Accommodations	2014	2015
Hotel, motel, etc.	88%	81%
RV park/campground	16%	16%
Stayed w/friends & family	3%	6%
Condo, timeshare	7%	5%
Dude ranch	3%	4%
Homesharing/vacation rental (Airbnb, etc.)	2%	5%
Other	4%	3%

Marketable trips

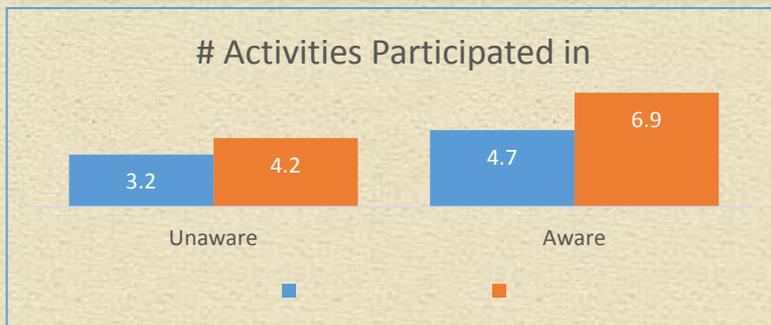


Activities & Motivations among Marketable Trips



- Visits to Wyoming in 2015 were motivated by some of the same activities as in years past, with state and national parks leading.
- The number of activities remains in the 4-5 range, year over year. However, as with places visited, the presence of children in the travel party is associated with higher activity participation. Ad awareness impacts activity participation more strongly among travel parties that include kids than those that do not.

	2012	2013	2014	2015
# activities	4.5	4.2	5.2	4.9



Activity	Participate	Motivate
Visiting a state or national park	57%	41%
Scenic drive	54%	18%
Hiking or backpacking	33%	16%
Wildlife watching	38%	14%
Camping	18%	11%
Visiting historical sites	33%	10%
Fishing	16%	7%
Snow skiing or snowboarding	9%	6%
Visiting museums	24%	4%
Other	5%	4%
Visiting Native American sites	17%	4%
Sightseeing tour	18%	4%
Mountain climbing	9%	4%
Horseback riding	11%	4%
Visiting hot springs	19%	4%

Trip Expenditures for Marketable Trips



- Total trip expenditures are consistent with 2014 levels, maintaining the increase from 2013 brought on largely by the improved economy.
- Those who come to the state with children spend on average 25% more than those who travel without children.
- Generally, the farther visitors travel to get to Wyoming, the more they spend in the state on average.
- Thus the National markets had the highest spending, with Chicago and Seattle spending reflective of these more distant origin markets. Core markets had the next highest spending, and visitors from Adjacent markets spent the least.

Expenditures for	2010	2011	2012	2013	2014	2015
Lodging	\$330	\$325	\$357	\$361	\$449	\$479
Meals/food/groceries	\$173	\$189	\$178	\$207	\$245	\$237
Entertainment	\$61	\$98	\$108	\$117	\$124	\$171
Activities	\$46	\$81	\$18	\$17	\$44	\$46
Shopping	\$101	\$162	\$80	\$120	\$106	\$133
Transportation	\$182	\$210	\$343	\$251	\$345	\$252
Other	\$21	\$50	\$34	\$19	\$41	\$52
Total	\$914	\$1,116	\$1,118	\$1,092	\$1,355	\$1,370

2015	National	Adjacent	Core	Chicago	Seattle
Lodging	\$558	\$337	\$328	\$411	\$352
Food	\$257	\$186	\$190	\$303	\$296
Entertainment	\$200	\$ 99	\$124	\$227	\$195
Shopping	\$144	\$ 90	\$111	\$223	\$220
Activities	\$ 59	\$ 19	\$ 20	\$ 27	\$ 95
Transportation	\$298	\$121	\$227	\$326	\$340
Other	\$ 63	\$ 25	\$ 18	\$ 71	\$105
Total	\$1,579	\$877	\$1,017	\$1,590	\$1,603

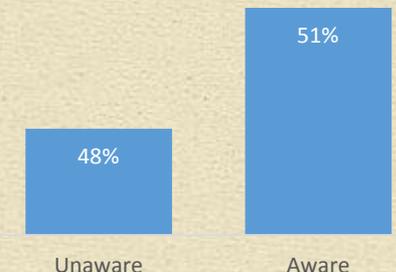
Trip Satisfaction



- One way to increase the likelihood of a return visit is to ensure that travelers have the best possible experience in the state. Ratings of marketable trips remain high, with half of visitors rating their experience “excellent” – the highest level since 2008.
- Generally speaking, travel parties that include children have lower ratings of trip experience. This may not be anything Wyoming tourism has the opportunity to influence, but it is important to note if messaging is aimed at driving more family travel to the state.
- However, ad awareness continues to be associated with higher trip satisfaction, suggesting that the ads are setting accurate expectations for a Wyoming trip experience.

Overall Experience	2007	2008	2009	2010	2011	2012	2013	2014	2015
Excellent	54.4%	57.2%	35.9%	37.0%	43.1%	43.8%	44.3%	43.4%	49.8%
Very good	29.6%	31.0%	43.1%	40.7%	29.1%	32.5%	33.3%	35.6%	32.8%
Good	12.6%	8.6%	21.0%	19.5%	24.0%	20.0%	17.4%	16.1%	15.5%
Fair	1.7%	2.4%	0.0%	2.5%	4.5%	3.5%	5.1%	3.4%	1.9%
Poor	1.7%	0.9%	0.0%	0.3%	1.2%	0.2%	0.0%	1.5%	0.0%

% Rating WY Experience as “Excellent”



Recommending the State



- More than 7 in 10 Wyoming visitors report having recommended the state as a trip destination to their friends, relatives or co-workers.
- In terms of Wyoming's place in the competitive set (or list of destinations that might also be in visitors' consideration sets), this represents the first time Wyoming has led in this measure. It is typically behind Colorado and/or Montana.

Recommended State	2011	2012	2013	2014	2015
Wyoming	69.1%	70.7%	69.5%	75.3%	72.3%
Colorado	86.1%	86.0%	80.1%	87.3%	71.5%
Montana	68.9%	76.4%	72.9%	75.2%	67.1%
Oregon	81.7%	77.8%	81.4%	80.6%	66.0%
Utah	70.8%	67.7%	59.7%	75.2%	65.3%
Washington	75.9%	75.2%	66.0%	70.2%	63.8%
Nevada	73.6%	73.1%	60.8%	68.8%	62.7%
South Dakota	68.9%	75.3%	67.6%	84.4%	61.4%
North Dakota		51.6%	59.9%	55.3%	55.9%
New Mexico	73.5%	61.8%	80.4%	70.5%	54.5%
Texas	67.1%	63.7%	53.0%	72.5%	53.8%
Idaho	53.0%	55.6%	70.0%	59.2%	51.3%
Oklahoma	54.4%	43.8%	30.0%	74.1%	32.9%
Kansas	52.5%	26.4%	20.2%	66.9%	31.4%

Only those who had visited a given state were asked whether they had recommended it.

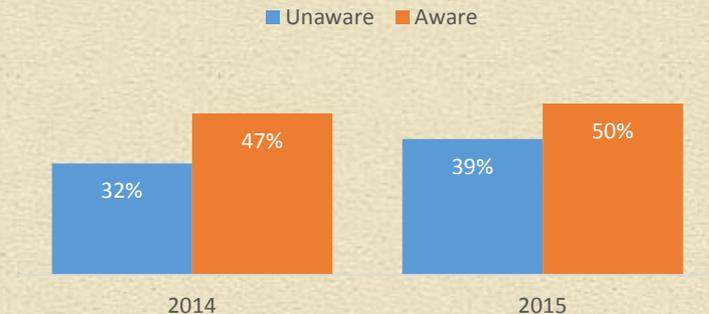
Likelihood to Visit in Next Year



- The percentage of visitors who report they are “very likely” to return to Wyoming is nearly one-half. The increase in visit intent is the fourth year of this upward trend, representing a shift from somewhat to very likely.
- Wyoming’s tourism campaign positively impacts visit intent, although it is notable that even unaware households in 2015 are more likely to visit than in the 2014 unaware travel measure.

Likelihood	2007	2008	2009	2010	2011	2012	2013	2014	2015
Very likely	28%	33%	26%	42%	37%	35%	36%	40%	46%
Somewhat likely	41%	33%	57%	28%	32%	35%	31%	41%	32%
Not likely	31%	34%	17%	30%	32%	30%	33%	20%	21%

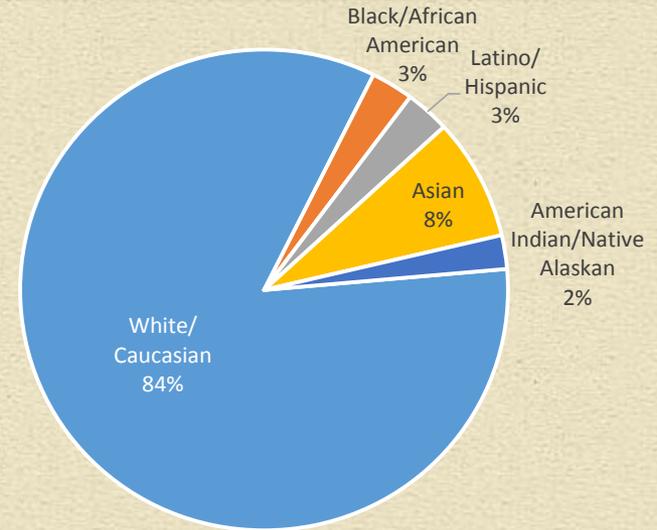
“Very Likely” to return to Wyoming, by ad awareness



Visitor Demographics



- Although there are some year-over-year shifts in the demographic profile, Wyoming visitors remain overwhelmingly affluent, with the majority married and college educated. The average age remains in the upper 40s. Average income continues to increase.
- In terms of ethnicity, most visitors are Caucasian. Interestingly, a higher share of non-white visitors travels to Wyoming with children and other family.



	2007	2008	2009	2010	2011	2012	2013	2014	2015
Married	65.7%	62.4%	65.7%	65.4%	68.6%	62.9%	75.9%	62.1%	74.4%
Not married	34.3%	37.6%	34.3%	34.6%	31.4%	37.1%	24.1%	37.9%	25.6%
High school or less	6.4%	16.4%	2.7%	5.5%	4.8%	6.6%	6.2%	10.3%	6.6%
Some college or tech. school	30.9%	40.1%	21.1%	23.1%	25.3%	22.5%	23.9%	19.4%	20.6%
College graduate	42.5%	32.4%	50.5%	44.1%	41.8%	40.2%	35.3%	38.0%	42.4%
Post-graduate degree	20.3%	11.1%	25.7%	27.3%	28.2%	30.8%	34.6%	32.2%	30.4%
People in household	2.6	2.8	2.7	2.7	2.8	2.7	2.3	2.7	2.8
Income	\$71,955	\$65,012	\$67,429	\$79,578	\$76,563	\$77,154	\$84,717	\$83,376	\$90,020
Age	50	46	40	46	40	40	53	46	49



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		

Strategic Marketing & Research Insights

1

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

Strategic Marketing & Research Insights

2

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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3

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
Northeast 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	Afton
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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5

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.

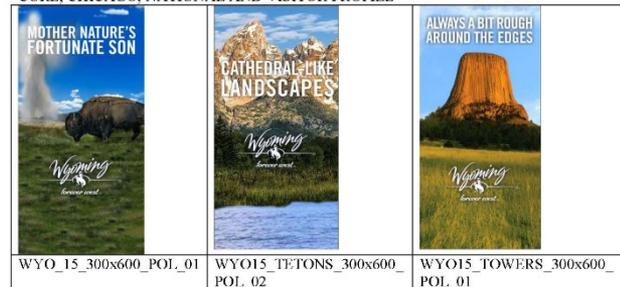
**ROI NATIONAL AND VISITOR PROFILE WILL SEE PRINT AND ONLINE ONLY
ROI CORE AND ADJACENT ADS FOR EACH MEDIUM ARE SPECIFIED IF THEY
ARE DIFFERENT**

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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6

Questionnaire

Dino
Good Dinosaur
TV



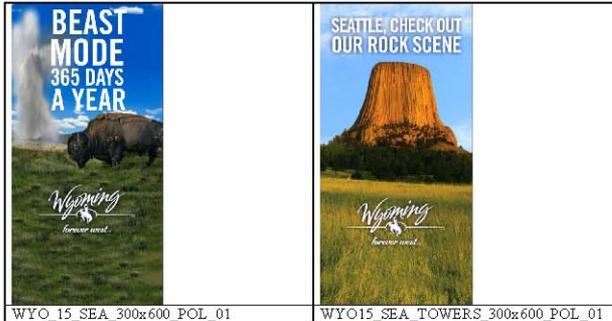
WY_30_WyomingAdventure.mp4
WY_30_WyomingAdventure.jpg
<https://youtu.be/TK79sSOck>

DIGITAL BANNERS



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

SEATTLE



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7

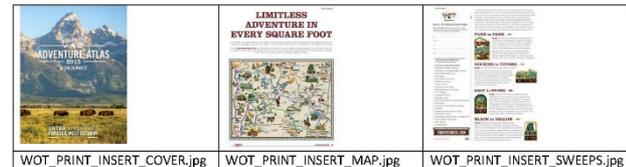
ADJACENT

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/xBpAEmlIA>

ADJACENT



WY14_WYTV1

<http://youtu.be/Pe5N2iR591I>

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8

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

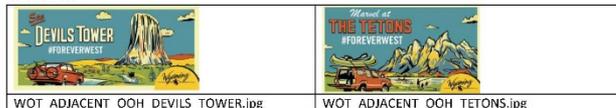
CORE AND CHICAGO



SEATTLE



ADJACENT



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9



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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10