

2014

YEAR IN REVIEW

Wyoming

forever west™



“Coming together is a beginning; keeping together is progress; working together is success.” - Henry Ford

Two years ago we had the vision to create a new kind of tourism agency; one with an entrepreneurial spirit, global perspective, and the agility to respond quickly to opportunities and challenges. That vision and clarity guides our every decision and contributes to delivering exceptional results as an organization and for delivering visitors and growing Wyoming's travel and tourism economy.

Last year was outstanding! We ended 2014 with the largest ever year over year increase in visitor volume since these numbers have been tracked. We grew visitation to 10.1 million overnight leisure travelers, which represents an increase of 11% year-over-year. Virtually every aspect of the visitor economy experienced growth. Direct spending grew to \$3.3 billion, generating \$159 million in tax revenues returned to our state and local governments.

Yet, we didn't do this alone. Local lodging tax collections – resources also dedicated to growing the visitor economy - grew to \$14.8 million, an 8.5% increase over the prior year. Additionally, private sector businesses spent nearly \$10 million in tourism marketing efforts. We know that our industry depends on us to leverage their investments and deliver the level of returns needed to grow their local economy.

Passion and a love of Wyoming is core to what we do. “Forever West” has emerged as one of the best known and highly respected brands in the destination marketing space. We got here by pursuing a clear strategic vision; maintaining a disciplined, long term viewpoint; and instilling enduring values in a team that has no equal in talent, professionalism and excellence.

Last year we introduced you to a newly aligned Office of Tourism, bringing about several changes and many exciting new opportunities. Our Brand Studio tackled

implementing an entirely new, forward thinking, consumer-centric approach to elevating our brand. We challenged our vendors to dig deeper, to inspire more and create excitement. Our Strategic Partnerships department laid the ground work for a system that cultivates partners and recognizes their investments. We established a Visitor Center Network designed to engage travelers while “here” to cross-promote and extend that length of stay. We embraced LEAN, a process improvement practice resulting in 33% savings in time, a valuable commodity now available to be used elsewhere. The Global Sales and Services team, completed this first full year, having participated in ten different tradeshows and sales missions focused on international audiences - across 4 continents - generating over 400 qualified sales leads.

The Wyoming Office of Tourism remains extremely well positioned to deliver strong results for our industry and to grow our domestic and global opportunities. An extraordinary team with a relentless commitment to excellence provides the expertise and wisdom to guide our decisions. Finally, we have a proven approach to building value over the long term.

Thanks to our partners and stakeholders for your confidence in us, and to our employees for committing their talent and tenacity to our success.

Henry Ford got it right, “...working together is success.” We look forward to many shared successes going forward.

My best,



Executive Director
Wyoming Office of Tourism



Diane Shober
Executive Director

Wyoming Tourism Board Members

Chairman
Renee Middleton
At Large
Cheyenne, WY

Vice Chairman
Sandy Newsome
District 5
Cody, WY

Immediate Past Chairman
Mark Kupke
District 2
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Devils Tower, WY

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District 3
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Darren Rudloff
District 1
Cheyenne, WY

John Rutter
District 6
Moran, WY

Jim Waldrop
At Large
Jackson, WY

Contents

VISITATION, JOBS & EXPENDITURES	1
BUDGET TO VISITOR RELATIONSHIP, INCREMENTAL TRAVEL	2
WEB PERFORMANCE	3
CORE CAMPAIGN.....	4
ADJACENT CAMPAIGN.....	5
2014 HIGHLIGHTS	6

Visitation, Jobs and Expenditures Show Strong Increases in 2014

↑11%
10.1 MILLION
OVERNIGHT VISITORS

↑1.6%
31,510
TRAVEL-RELATED
JOBS

↑3.6%
\$159 MILLION
STATE & LOCAL TAXES

\$3.3 BILLION
IN DIRECT EXPENDITURES

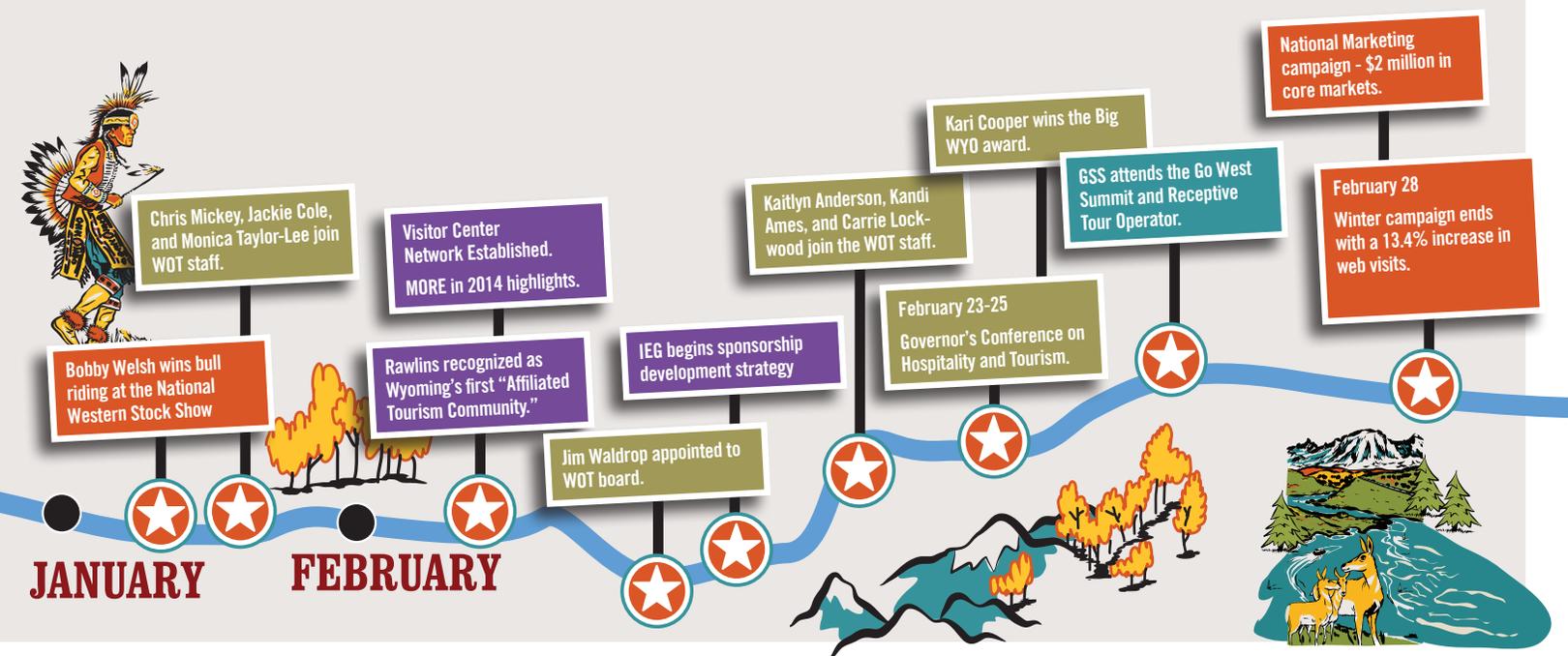
↑57% ROI
\$210 EARNED
FOR EVERY DOLLAR SPENT

Overnight leisure tourism continued to trend positively in 2014, reaching 10.1 million visitors--an increase of 11% from 2013's total overnight leisure visitors. From a competitive standpoint, Wyoming is out-pacing the national average for visitor growth and continuing to make significant gains in the travel sphere.

Tourism in Wyoming also proved to be a significant contributor to the economy of the state. Tourists brought \$159 million in state and local taxes to Wyoming in 2014, a 3.6% increase from 2013. The job market in Wyoming also thrived as a result, seeing a 1.6% increase in travel-related jobs for residents.

Overall, tourism dollars are accomplishing an exceedingly positive return on investment. The state saw \$210 dollars generated for every dollar spent, resulting in 3.327 billion in direct expenditures for 2014.

Source: Dean Runyan & Associates, Strategic Marketing & Research Inc.



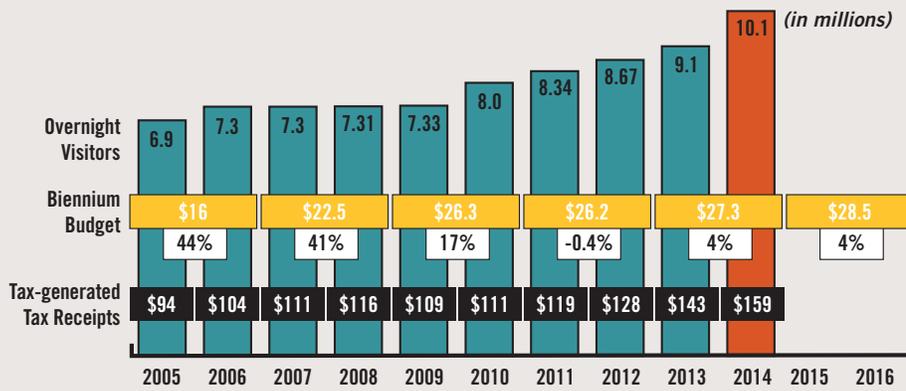
Positive Relationship Between Marketing Investments and ROI for Wyoming

MARKETING INVESTMENTS PAYOFF!

↑ 22% TRIPS
INFLUENCED BY ADVERTISING

Overnight visitors have steadily grown since 2005. Budget to Visitor Relationship shows the correspondence between overnight visitors and tax-generated tax receipts specifically related to the biennium budget.

Trips that were influenced by the WOT advertising campaign continued positive trends during 2014 with an increase of 34% from 2012. Overall return on investment for 2014 saw an impressive 57% increase from 2012.



Source: Strategic Marketing & Research, Inc., Visitor Profile 2014; Dean Runyan and Associates, Wyoming Travel Impacts 2014; and State of Wyoming Budget Office

Total Economic Impact	2012	2013	2014
Incremental Trips	542,140	527,935	709,736
Repeat Trips	52,078	133,863	98,396
Total Influenced Trips	594,218	661,798	808,132
Economic Impact	\$685,845,643	\$722,683,566	\$1,095,019,383
Expenditures	\$5,542,918	\$5,380,195	\$5,216,461
ROI	\$124	\$134	\$210
Taxes Generated	\$28,119,671	\$29,630,026	\$44,895,794
Tax ROI	\$5.07	\$5.51	\$8.61

Source: Strategic Marketing & Research, Inc., Advertising Effectiveness ROI 2014

MARCH

- 63rd WY State Legislature approves \$2.5 million to expand campaign into Seattle market for 2015-16.
- Staff attends Active America China.
- Global Sales and Services hosts the delegation of Taiwan Provincial Government.
- Global Sales and Services attends UK Mission.

APRIL

- SXSW in Austin, TX
- 1st round Forever West Spring co-op released in 26 markets.

WOT Consumer Website Performance on the Rise

↑ 11%
2.1+ MILLION WEB SESSIONS

↑ 12%
1.6+ MILLION UNIQUE WEB VISITS

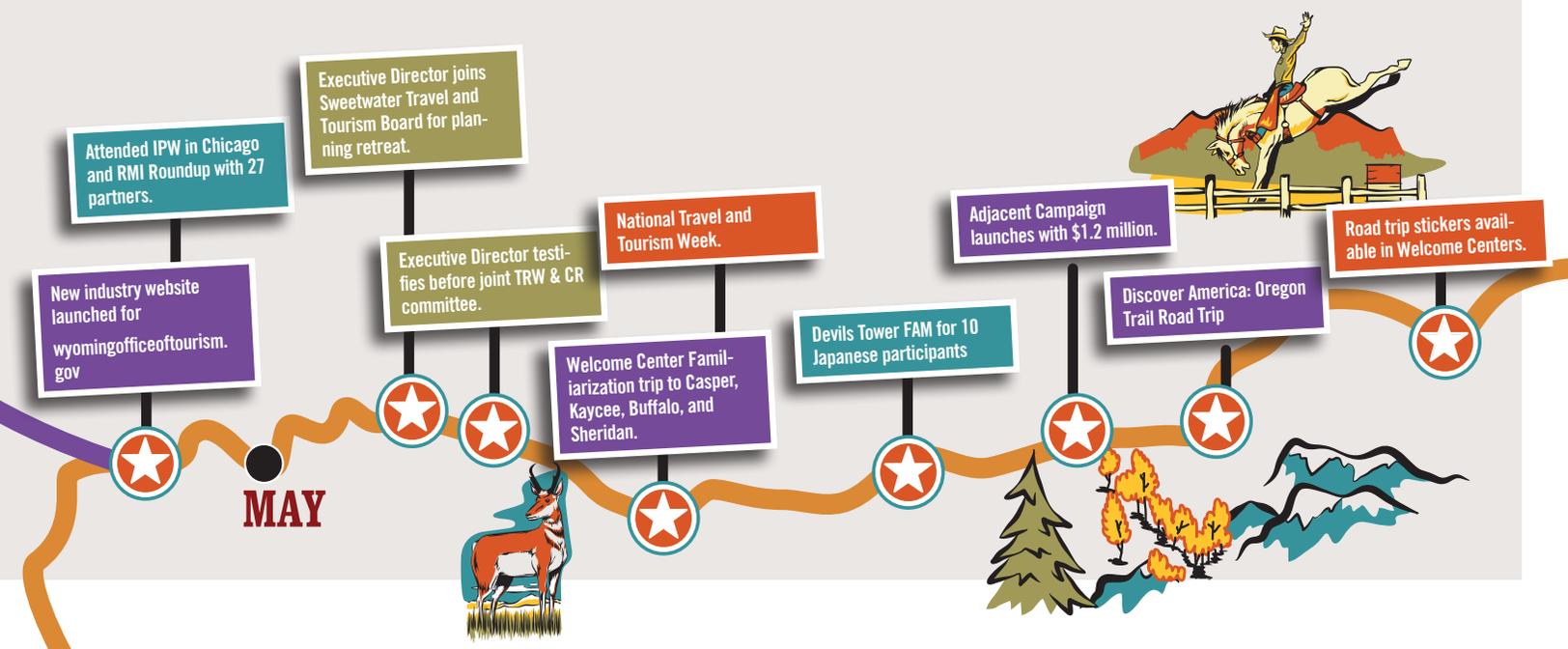
↑ 9.9%
7+ MILLION WEB PAGE VIEWS

↑ 30%
REFERRALS
TO PARTNER SITES

↑ 16%
INQUIRIES
FROM WEB, PHONE, MAIL

The WyomingTourism.org website continues to be an extremely robust and influential platform of WOT's marketing efforts. All outreach and advertising designed to reach potential visitors point to our main website, housing thousands of pages of content, partner listings, planning tools, inspiring imagery and more.

With a significant increase in referrals, more Wyoming businesses were able to leverage their impact and exposure by 30%. Inquiries, which serve as a strong signal of intent, grew by 16%, solidifying the WyomingTourism.org website as a key component in the travel planning life cycle.



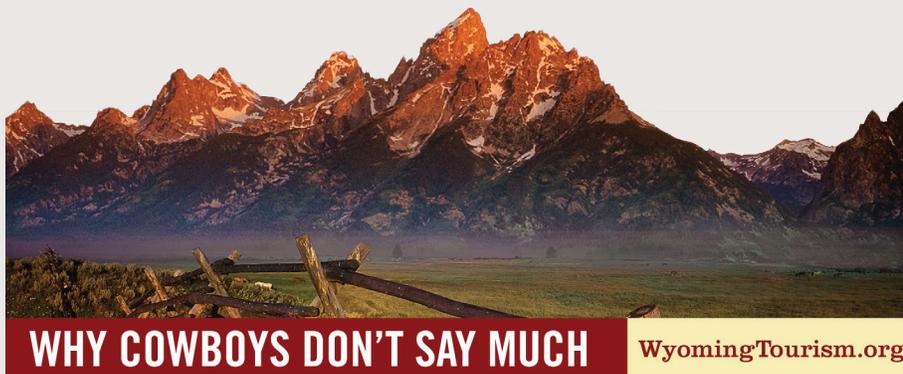
MAY

Wyoming's Advertising Campaign in Core Markets Show Continued Growth

YEAR #4 ROAM FREE CAMPAIGN

In the fourth year of the Roam Free campaign, the marketing and advertisements continued to ignite travel among potential visitors. An additional print ad was created, which highlighted Wyoming's majestic wildlife with Yellowstone National Park's Old Faithful in the background. New out of home creative included billboard extension to complement Wyoming's picturesque skyline. New digital advertisements featured existing TV commercial footage with expandable video banners.

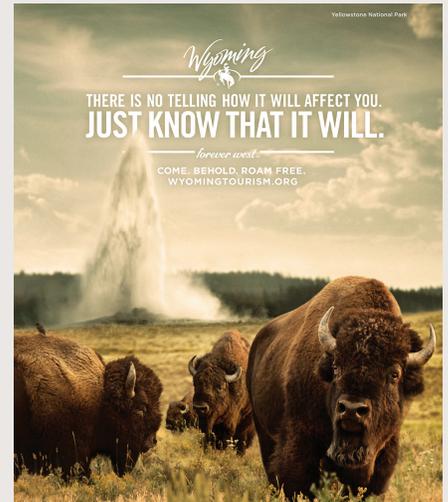
The Wyoming Forever West campaign continued to generate leads for participating Wyoming partners through a sweepstakes, newspaper insert, online ads and website. The campaign reached readers in major markets around the United States and introduced them to the attractions of the state. In 2014, the insert featured a print circulation of 2 million, distributed 17 states. Thirty Wyoming partners participated in the Forever West campaign, and results included a 16% increase in web visits to foreverwest.com and a 10% increase in sweeps entries.



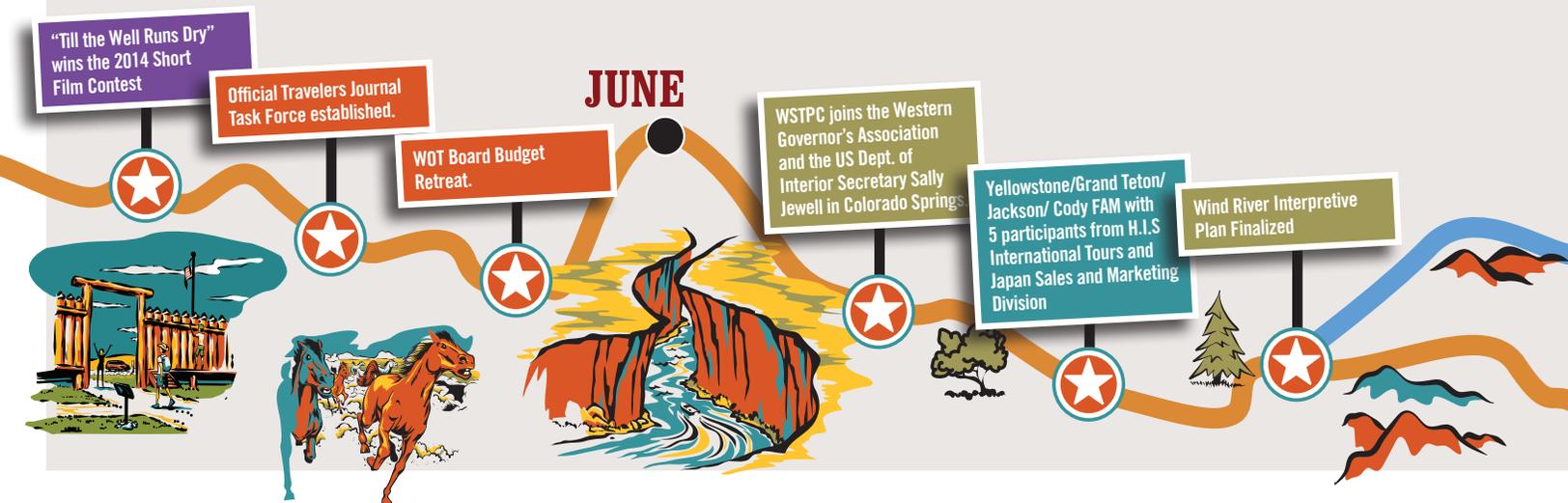
Out of Home



Digital Ad



New 2014 Print Ad



Expanded Creative for Adjacent Marketing Campaign

ROAD TRIP CAMPAIGN CONNECTS VISITORS TO SHOULDER SEASON FUN!

The adjacent campaign targets markets in surrounding states. Digital ads, out of home billboards, newspaper insert, and a collection of stickers focus on the All Roads Lead to Yellowstone concept with colorful illustrations that encourage travelers to take a road trip.

Three new partner stickers were added to the mix, including Albany County Tourism, Wyoming Historic Sites and Wyoming State Parks stickers. An additional two new stickers showcased Wyoming's memorabilia hiking and biking experiences. A tear-off road map was created and distributed in welcome centers around the state. The map showed all the stickers that were available and identified where visitors could pick up and collect the stickers. A new television spot also launched in the adjacent markets in 2014 with a catchy "Roamin' Wyoming" tune.



NEW PARTNER STICKERS



WHERE TO PICK UP STICKERS

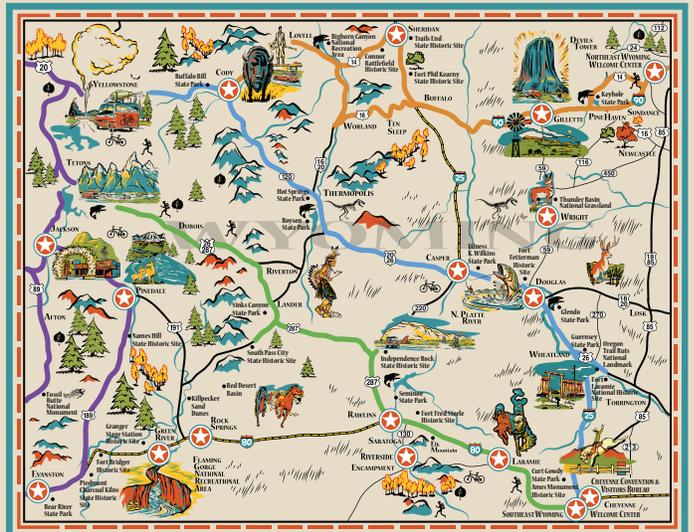
Southeast Wyoming Welcome Center
 Northeast Wyoming Welcome Center
 Sheridan | Laramie (Summit) | Rawlins
 Bear River State Park | Cody | Casper
 Jackson | Pinedale | Green River | Riverside
 Rock Springs | Douglas | Wright | Gillette
 Cheyenne Convention & Visitors Bureau

PICK UP MAP & STICKER LOCATIONS

FOR MORE INFORMATION ON STICKER LOCATIONS:
www.wyomingtourism.org/map



GET SOCIAL WITH YOUR TRIP
 #ROADTRIPWY #FOREVERWEST



Visitor Center Map

4th of July Celebrations state wide.

WOT attends Longmire Days in Buffalo.

WOT supports Cowboy Tough Adventure Race.

Executive Director testifies before Joint TRW & CR Committee.

Fall print co-op insert drops in 10 markets.

WOT staff attends ESTO in Louisville, KY

JULY

AUGUST



Significant Achievements and Partnerships of 2014

BUSINESS OPERATIONS INCREASED EFFICIENCY BY 33%

Efficiency became the focal point of WOT's Business Operations department in 2014. To improve their operational excellence, the department underwent the LEAN process improvement to evaluate how they can best operate in the most time and cost effective way. Since the process' completion, the department now operates in a way that saves 27% in work steps and 33% in process time.



WYOMING OFFICIAL TRAVELERS JOURNAL ORDERS INCREASED BY 16,000

It was a banner year for the Official Travelers Journal (OTJ). Journal orders were up 13.68% from 2013, with an annual total of 124,000- the highest number WOT has seen in over five years. The Journal also proved to be an extremely valuable tool in extending length of stay and the amount spent during each trip. Visitors who used the 2014 OTJ increased their spending by 11.6% and increased their stay in Wyoming by 20.8%.



COWBOY STATE LIVED UP TO THE COWBOY IMAGE

Wyoming's authentic Cowboy image was expanded in 2014. Cowboys and cowgirls were featured in a dozen television news and sports stories that were broadcasted in Wyoming, Montana, and South Dakota. WOT invested in the Cowboy Marketing program even further by adding sponsorship dollars and promotional support to all eight Wyoming college rodeo programs. WOT staff joined the team at the cumulative event for the rodeo season at the NFR breakfast in support of the Wyoming team (pictured above).

WYOMING ASSISTED FEATURES ON THE BIG SCREEN

In 2014 the Film Industry Financial Incentive (FIFI) program approved five applications, including ski films "Higher" and "Almost Ablaze", the Cody-based hunting program "The Best of the West", the adventure travel series "Locals", and the Nat Geo documentary "Wild Yellowstone". The WOT Film Office assisted numerous film and television inquires/projects throughout the year as well, including 19 commercial, 13 documentary, and 23 feature films.

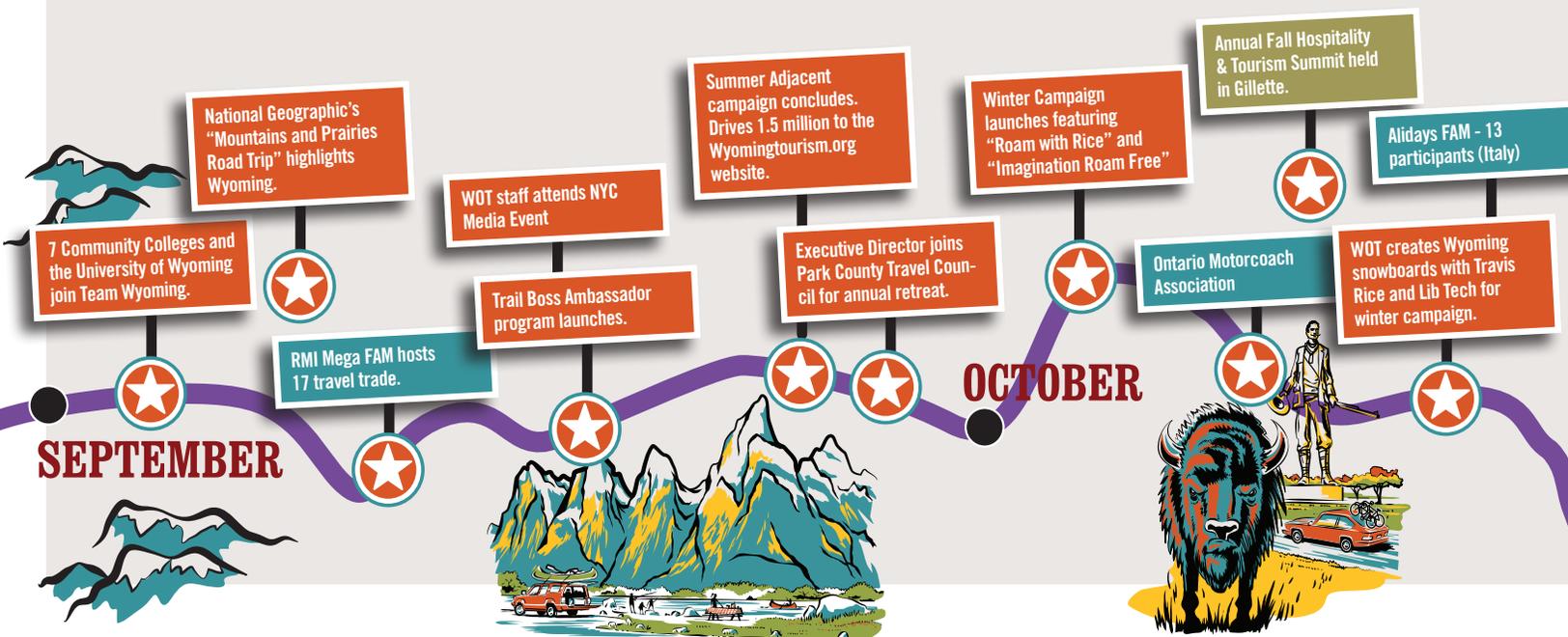
WOT'S INTERACTIVE PLATFORMS REVITALIZED FOR BRAND COHESION AND ACCESSIBILITY

There were major changes to Wyoming websites and blogs this past year. In the Spring of 2014, the WyomingOfficeOfTourism.gov website launched a new design that was consistent with the WyomingTourism.org site. Tourism's blogs received the same attention. Later in the year, WyomingTourism.org moved to a new back-end and Content Management System (CMS), allowing for easier industry access to manage content for business, deals and events listings.



WOT PARTNERS WITH PRO SNOWBOARDER AND WYOMING NATIVE, TRAVIS RICE, AS THE OFFICIAL SPOKESPERSON OF WINTER

The winter campaign championed the winter product in a way that has been generating more engagement on social campaigns than previous years. Travis Rice was brought on board as the official spokesman for Winter. Rice's participation drove a groundbreaking number of sweepstakes entries: a total of 19,834 and a 300% increase from 2013.



WYOMING VISITOR CENTERS ESTABLISHED COLLABORATIVE NETWORK

The Visitor Center Network was developed to share best practices and communication related to visitor services statewide. This network is comprised of 26 charter members representing 17 of the 23 Wyoming counties, and continues to grow to include our state and federal partner agencies operating visitor services statewide. Through collaborative communication, research, and best practices this network builds the foundation to champion the destination and the brand statewide.



SOUTHEAST CENTER WELCOMED OVER 156,003 VISITORS IN 2014

Wyoming's visitor centers play an influential role in acting as a crucial interface to help guide and assist travelers on the ground. In 2014, welcome center staff at the southeast location in Cheyenne saw a 5% increase of visitors - a total of 156,003 for the year. Wyoming's Welcome Centers continue to improve the experience and awareness by utilizing digital signs, interactive displays, and exemplary customer service.

FAHLGREN MORTINE TEAMED UP WITH WOT TO EMPOWER FUTURE PR EFFORTS



In November 2014, WOT contracted with Fahlgren Mortine, an award-winning marketing and communications agency with a strong specialty in tourism, to maximize Wyoming's reach through strategic media, public relations, and partnership opportunities. Fahlgren Mortine has hit the ground running, planning media missions in Seattle, New York, and Toronto, and developing creative PR initiatives to promote the 125th anniversary of the State.

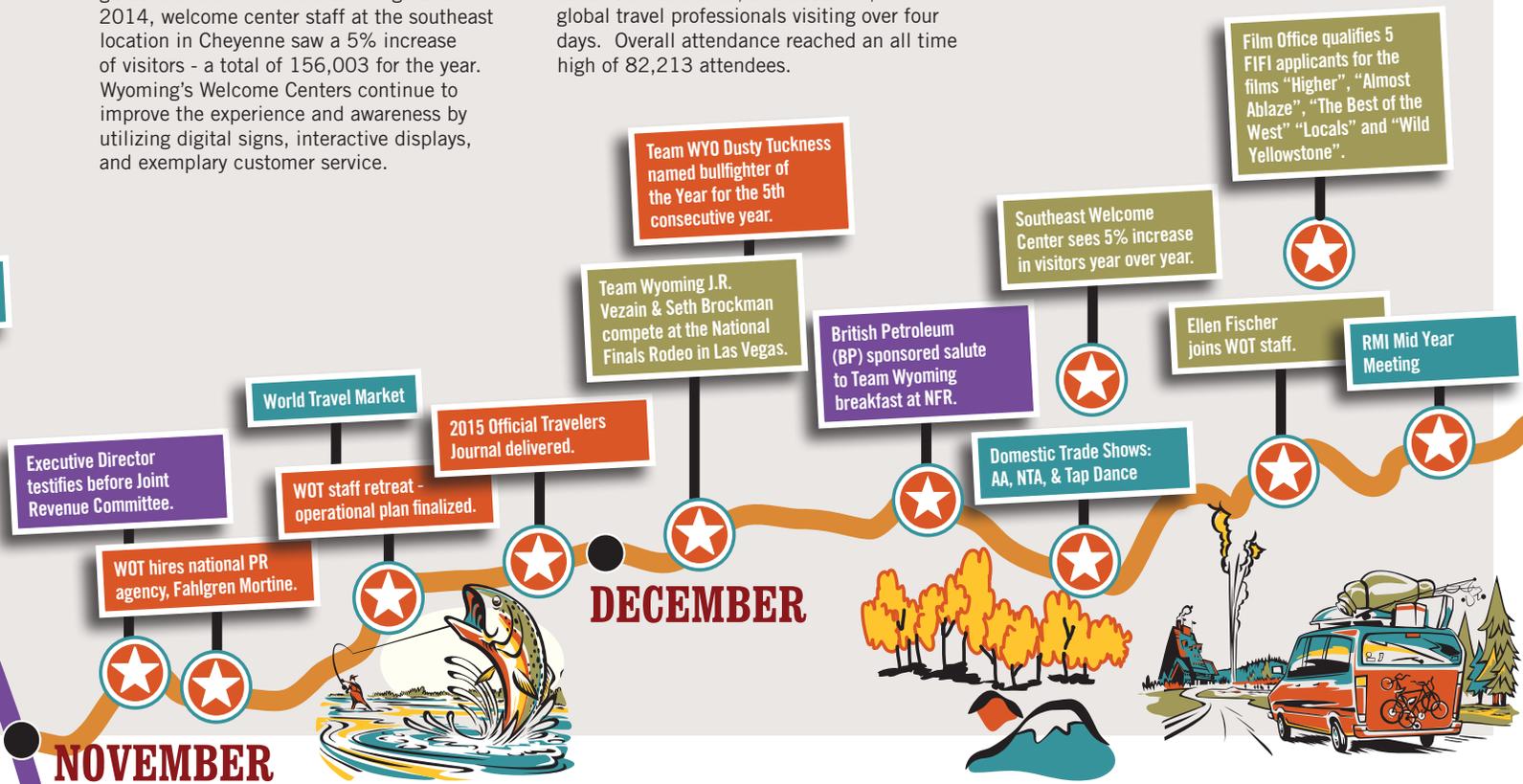


ROCKY MOUNTAIN INTERNATIONAL (RMI) MEGA FAM INTRODUCED 17 TRAVEL TRADE REPRESENTATIVES TO WYOMING

The 2014 RMI Mega FAM brought several key international buyers to Wyoming to experience the product firsthand. The group traveled to Jackson, Teton Village, Grand Teton National Park, Dubois, Riverton, Thermopolis, Cody, and Yellowstone National Park. The FAM gave the tour operators a chance to see the amazing landscapes, rich culture and also an opportunity to meet with local representatives interested in working with the international markets. The product knowledge that the operators gained and the relationships that were built along the way will lead to increased business for Wyoming suppliers.

WOT REPRESENTED WYOMING TO OVER 50,000 GLOBAL PROFESSIONALS AT WORLD TRAVEL MARKET

WOT returned to World Travel Market (WTM) in 2014 after a two year absence with a larger and completely redesigned booth which focused on iconic images of the region. WTM is one of the largest travel trade shows in the world and is the largest in the UK, with about 5,000 exhibiting companies representing about 186 countries, and about 50,000 global travel professionals visiting over four days. Overall attendance reached an all time high of 82,213 attendees.





Office of Tourism



Not Pictured: Angelina Cisneros, LeeAnne Cash, and Kathaleen Spencer

Wyoming Office of Tourism staff

Diane Shober, Executive Director

BUSINESS OPERATIONS

Anita Benton, Director of Business Operations
Angelina Cisneros, Business Services Coordinator
Jackie Cole, Business Services Coordinator
Vicki Morris, Business Services Senior Coordinator
Amanda Roberts, Accounting Manager

Chava Case, Human Resources Manager
Ben Peterson, IT Help Desk Technician

BRAND STUDIO

AnnDrea Boe, Director of Brand Strategy
Kaitlyn Anderson, Content Marketing Manager
Carrie Lockwood, Marketing Services Senior Coordinator
Darin Lundberg, Interactive Marketing Manager
Mike McCrimmon, Visual Assets Manager

Chris Mickey, Media & Public Relations
Lesley Rowbal, Creative Services Manager

GLOBAL SALES & SERVICES

James Scoon, Director of Global Sales & Services
Kandi Ames, Americas Market Development Manager
Monica Taylor-Lee, Asia Market Development Manager

RESEARCH INSIGHTS

Ellen Fischer, Global Insights & Research Manager

STRATEGIC PARTNERSHIPS

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LeeAnne Ackerman, Northeast Welcome Center Supervisor
Britney Butler, Industry Relations Manager
Steve Kelso, Southeast Welcome Center Supervisor
Kristin Phipps, Visitor Engagement Senior Manager
Kathaleen Spencer, Welcome Center Specialist

Wyoming Office of Tourism

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