

Agency 066
Wyoming Tourism Board Annual Report
FY14

General Information

Agency name:

Wyoming Office of Tourism

Director's name and official title:

Diane Shober, Executive Director

Agency Contact person:

Diane Shober

Agency Contact phone:

307-777-7777; 307-777-2808 (Executive Director's direct line)

Mailing address:

5611 High Plains Road
Cheyenne, Wyoming 82007

Web address (URL):

www.wyomingtourism.org (consumer site)

www.wyomingofficeoftourism.gov (industry site)

www.wyomingfilm.org (film office site)

Other Locations (Street addresses not required):

None

Statutory References:

W.S. 9-12-1001 through 1002 Wyoming Tourism Board

W.S. 9-12-402 through 406 Film and Video Promotion

Clients Served:

Vacationing Public; Travel Trade; Wyoming Tourism-Related Businesses and Services;
Film Production Trade Professionals and Organizations.

Budget Information (Expenditures for FY14):

\$13,050,166

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Name of Department/Division/Program: Wyoming Office of Tourism

Report Period: FY14 (July 1, 2013 through June 30, 2014)

Wyoming Quality of Life Result:

- 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.

Contribution to Wyoming Quality of Life:

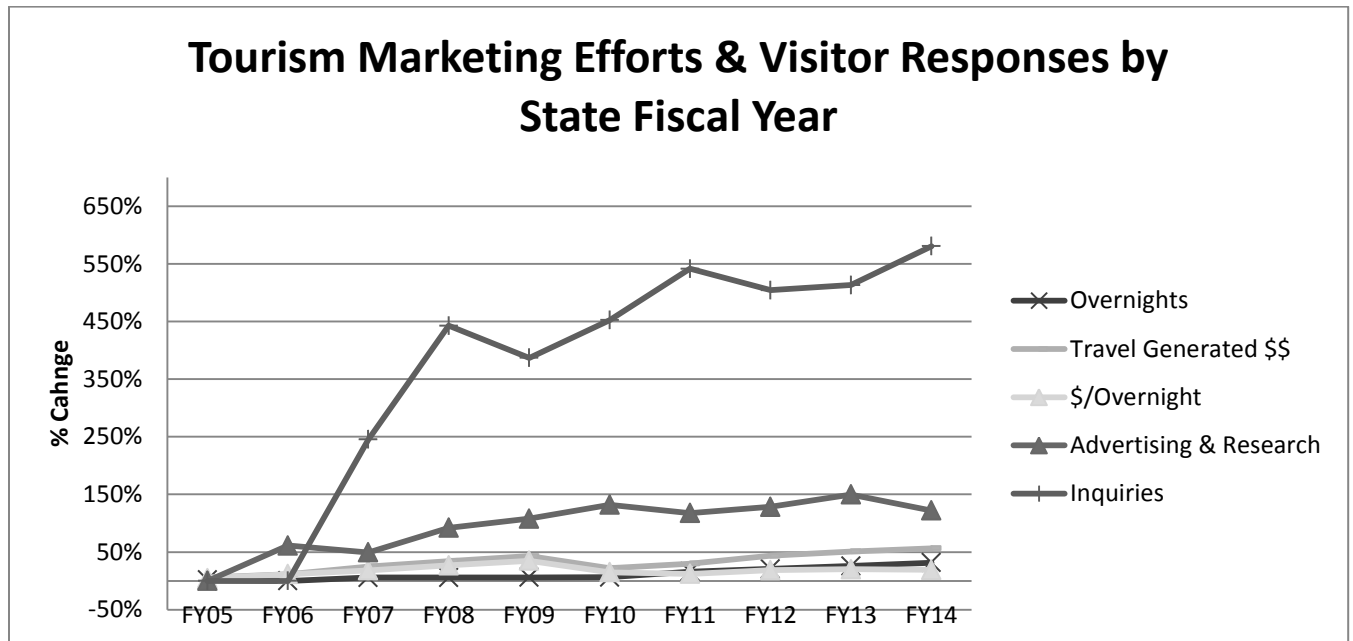
Wyoming Office of Tourism supports these goals by promoting and facilitating increased travel to and within the state of Wyoming. A healthy tourism economy contributes to business sustainability and strengthens the industry's job and income generation capacity.

Basic Facts:

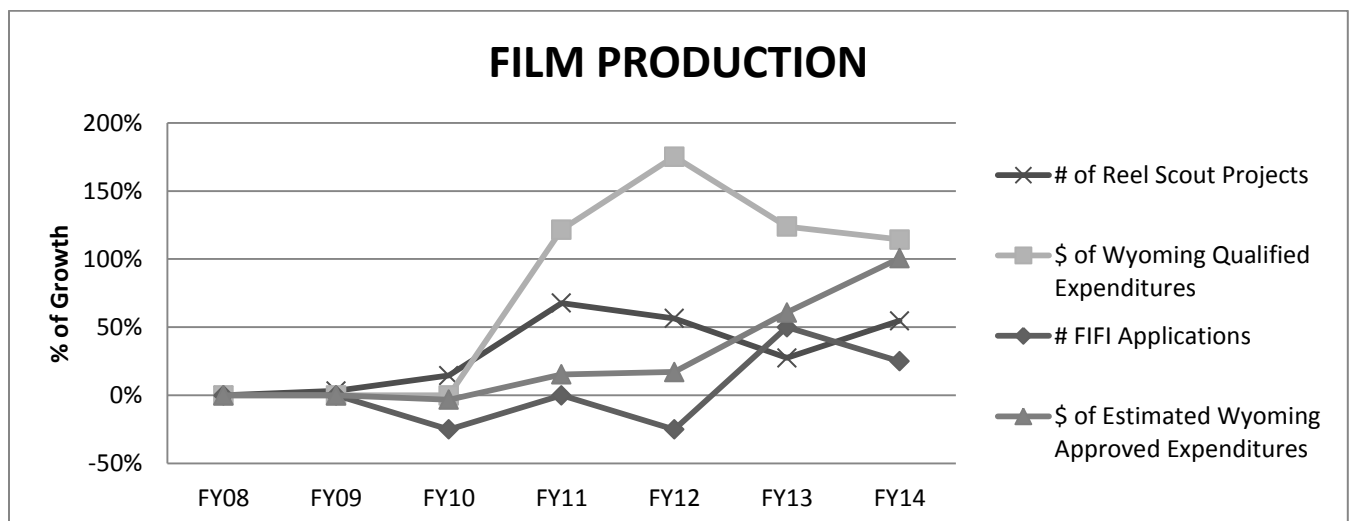
Wyoming Office of Tourism has 24 full-time and part-time staff positions and operates with a biennium budget of \$27,769,263. The funding sources for the budget are 100% general funds. Programs include sales and marketing efforts in the following areas:

- Brand Management
- Global Sales and Services
- Strategic Partnerships
- Business Operations

Performance:



(Note: All data reflects calendar year 2013 with the exception of Marketing and Outreach which reflects FY14)



Story behind the last year of performance:

Wyoming Office of Tourism (WOT) provides a unique value to Wyoming as the only statewide organization dedicated to growing Wyoming's tourism economy. Through a series of programs, WOT fulfills its mission to promote and facilitate increased travel to and within the state of Wyoming. By working with strategic partners and stakeholders, WOT will sustain the vision for the destination that *Wyoming is the only true west experience*.

The local tourism industry relies on WOT to create an umbrella marketing campaign, promoting Wyoming as an ideal vacation destination and positioning Wyoming against competitive brands as the destination of choice.

First and foremost, WOT must assure that visitors have Wyoming at the top of their mindset when considering a vacation destination. The marketplace is competitive and it is critical that the Wyoming brand stands out above the clutter of other rival destinations as well numerous entertainment options.

Effective advertising and outreach efforts create brand awareness. Consumers that are brand aware are twice as likely to visit as non-aware consumers. Once deployed, potential visitors respond to marketing campaigns and are driven to explore Wyoming vacation planning information through a variety of response platforms such as the website, mobile and tablet sites, social media outlets, internet search engines and digital downloads of publications (inquiries). As WOT'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 resources have increased by 122% from FY04 to FY14, during that same time inquiries have grown by 581%. The increase in advertising and outreach allows the Wyoming message to reach substantially more consumers, resulting in increased awareness and thus increased interest in a Wyoming vacation.

Just like awareness about a destination leads to inquiries, in turn, inquiries about a destination lead to actual visits. Since 2004, Wyoming has enjoyed a 31% increase in the number of overnight visitors, which result in direct travel-generated sales on such things as shopping, accommodations, gasoline and fuel, food, entertainment and recreation, just to name a few. Despite fluctuations in a national economy during the past decade, visitor spending and associated sales tax collections from travel-generated spending have grown by 57% from FY04 to FY14. 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, WOT 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. By developing robust strategic partnerships with industry stakeholders and regional or national partners, WOT can leverage the collective resources to continue to elevate the awareness of the brand and further drive Wyoming's tourism economy. The ten year trend analysis indicates that it's working.

As the only statewide organization dedicated to growing Wyoming's tourism economy, WOT plays a major role in influencing travelers before, during and after their trip to Wyoming.

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 and floods) and global issues (terrorism, housing market, presidential elections and gas prices) can impact people's ability and willingness to travel.

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. These companies employ local crews ranging from just a few to hundreds. Film production contributes significantly to Wyoming's tourism economy by enhancing the public visibility through television, DVD and motion picture distribution.

The Wyoming Film Industry Financial Incentive (FIFI) program was developed to provide the entertainment industry a financial incentive and make Wyoming more competitive in bringing the jobs, economic impact and tourism promotion that on-location filming contributes to a state. FIFI legislation was passed by Wyoming's 57th Legislature and enacted into law in February 2007.

Through marketing and promotion efforts, awareness of location opportunities, the incentive program and the increased number of qualified workers, interest in filming in Wyoming has expanded. Film Office inquiries are fulfilled through an online packaging system called "Reel-Scout." The software combines a comprehensive contact management system, digital photography library and a local crew database to better showcase Wyoming's production resources. 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. 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 FY08 to FY14, the number of Reel-Scout location packages distributed has increased by 55%.

In FY09, the FIFI program began to show concrete production activity so it 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. Since the inception of the program, 26 FIFI projects have been approved, representing over \$6.89 million in Wyoming expenditures for the purchase of in-state goods and services associated with film production.

What has been accomplished:

1. Expand research requirements on all levels:

- With the Roam Free campaign in its fourth year, WOT has continued to measure consumer awareness of Wyoming advertisements in key markets. Awareness dipped slightly from 41% in 2012 to 38% in 2013, a direct correlation to a 3% reduction in the advertising budget.
- The Roam Free campaign operated with consistent efficiency in 2014 at \$0.15 per aware household.
- Expanded the use of the WOT research co-op by 50% (specifically intercept studies and lodging studies). WOT provided \$35,000 in co-op research dollars to nine industry organizations.
 - Carbon County Visitors' Council - Lodging Study & Intercept Study
 - Goshen County Visitors' Council - Lodging Study

- Crook County Tourism Tax Board - Intercept Study
- Converse County Tourism Tax Board - Intercept Study
- Campbell County - Destination Assessment
- Visit Cheyenne - Traveler Profile
- Cody/Park County Travel - Lodging Study
- Sweetwater County Travel and Tourism - Advertising Conversion Study
- Integrated the WOT adjacent road trip campaign into annual ad effectiveness research.

2. Enhance consistency and distribution of advertising message:

- The number of aware households increased 8% in the Chicago Market; 16% in the Core Market; 11% in the Adjacent Market; and expectedly decreased by 11% in the National Market due to a 22% decrease in spending in the latter.
- Achieved 23.47% added-value to the media buy, representing approximately \$1,144,057 in no-cost media placement.
- Continued an in-season, summer TV campaign “Road Trip Wyoming” in regional markets (Salt Lake City, Denver, Billings, Idaho Falls, Butte/Bozeman, Boise, Colorado Springs, Rapid City).
- Participation in the advertising co-op program included 175 co-op advertisers spending \$703,807.
 - Search Engine Marketing co-op included seven advertisers - \$40,000
 - Spring/Summer newspaper co-op included 30 advertisers - \$122,798
 - *Official Wyoming Travelers Journal* (OTJ) included 79 advertisers - \$426,239
 - Branded Fulfillment Envelope included - 12 advertisers - \$30,373
 - Official Wyoming Tourism Website included 36 advertisers - \$67,760
 - Roundup E-newsletter included 11 advertisers - \$16,637
- Continued social media strategy integration with Roam Free campaign messaging.
- Introduced a hashtag strategy for added campaign exposure and overall searchability, including #wyoming, #foreverwest, #roamfree, #roadtripWY.
- Continued partnership with Convince and Convert for social media audits.
- Social Media efforts resulted in the following:
 - Facebook – 172,168 (243% increase)
 - Twitter – 10,522 (26% increase)
 - YouTube – 98,396 Views (7.5% increase)
 - Pinterest – 2,169 followers (37% increase)
 - Roundup Blog – 32,492 views (2% increase in return viewers)

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

- User sessions on the WOT desktop site grew by 23% in FY14. User sessions on the WOT mobile site grew by 91% during the same time period.
- Business referrals from the WOT site to Wyoming industry partner sites increased by 283% in FY14.
- Digital downloads of the *Official Travelers Journal* grew by 5%, while the number of printed copies requested grew by 6%.
- The following enhancements were added to the digital response platforms to maximize the online user experience, thus resulting in increased visitation, filming or learning about

Wyoming:

- Further unified the Roam Free campaign, originally launched in FY11, by creating a consistently branded front-end user interface for all WOT websites. This included the industry, consumer, kids and film sites, as well as the Roundup, Rodeo Hand and Film Office blogs.
- Completed a database migration and mapping of all content on stand-alone websites to the new Umbraco backend Content Management System (CMS) for ease of administration, increased data integrity and enhanced usability.
- Transferred all blogs from a Blogger.com platform to a Wordpress platform for added flexibility, management and future evolution.
- Integrated the winter and summer campaign microsites into the consumer website URL domain to maximize SEO/SEM efforts and organic discoverability.
- Continued Search Engine Optimization (SEO) enhancements, keywords and descriptions.
- Continued to collect industry, marketing vendor and consumer feedback to determine website and campaign improvements. This was done through cross-functional post-season campaign reviews and ongoing online consumer surveys.
- Improved WOT's eNews communications efficiency by cleansing the subscriber database for enhanced focus on engaged subscribers.
- Further expanded co-op for fulfillment lead generation on the WOT consumer website for destinations and businesses.
- Created the flexibility to customize and evolve the amenities for destination and business listings.

4. Expand media relationships and product offerings:

- Enhanced media and PR outreach which produced \$64.4 million in media value by having Wyoming mentioned in articles and productions in newspapers, magazines, television shows, online news, blogs, and social media.
- Improved and increased A-List media contacts through one-on-one appointments at International Pow Wow (IPW) and Rocky Mountain International (RMI) Roundup, and personal outreach.
- Utilized the ProxySys multi-media database, YouTube and Sorenson 360 to preview and distribute Beta and HD footage, high resolution images and pre-edited videos for media requests, resulting in 570 fulfilled requests for visual assets for instant broadcast by television stations, online news networks and travel writers.
- Reviewed video and photo equipment inventory to identify gaps in visual assets acquisition capabilities, and invested in appropriate equipment to allow WOT to fulfill current consumer expectations for quality and trends.
- Partnered with the tourism industry to provide 34 national and international journalists the opportunity to experience Wyoming first hand through hosted press trips.

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

- Completed an Australian and New Zealand Sales Mission. Overall, 24 follow up leads were produced, 53 contacts were made, over 140 travel professionals were educated and

trained on Wyoming product. The Real America region hosted three social events that were attended by 75 trade, media and industry partners.

- Participated in International Travel Fair (ITF) in Taiwan. In coordination with the Idaho Division of Tourism, Wyoming distributed materials at the largest trade show in Taiwan. The four day event attracted 315,000 visitors, and brought over 3,000 local and international press. The show also offered opportunities to meet and build relationships with top tour operators interested in expanding into Wyoming.
- Completed a sales mission in the Benelux market in November. Conducted 43 product manager meetings from 42 tour operator companies. The product meetings covered Wyoming tourism product currently being offered by tour operators, as well as introductions to lesser known or new product in Wyoming.
- Participated in the 2014 Nordic Mission and Trade Shows focused on Norway and Denmark. Hosted an RMI/Wyoming media/trade gathering where Wyoming product was discussed with the 27 attendees. Conducted one-on-one, B2B appointments with 33 decision makers. Setup and participated in a booth at Reisleiv, the largest consumer show in Norway. WOT also participated in a small tradeshow specifically focusing on the region that was attended by 16 trade and media members.
- In the U.S., attended Active America China, and utilized an interpreter to meet, in-language, with 22 Chinese tour operators and U.S. based receptive operators who are responsible for most of the outbound Chinese travel to the U.S. Other U.S. based international shows attended include North America Journeys (NAJ) Summit West; Go West Summit and reception; RMI Roundup; and International Pow Wow (IPW) and reception where meetings with tour operators and receptive tour operators were conducted. Leads from these shows totaled 354.
- Completed sales missions in France and the U.K. In the U.K., WOT worked with top operators from 11 offices and educated 42 staff members on the diverse product offerings. WOT met with 14 tour operators in the Paris, France area on the two day mission. It was followed with a VIP dinner attended by 40 people, most of whom were top trade, media, and airline representatives in France.
- Hosted 23 international Familiarization (FAM) tours incorporating lesser known routes when possible. These FAMs consisted of 85 participants from nine different countries, including international receptive tour operators with offices in the USA.
- Worked with 703 travel professionals and 297 general consumers during 49 seminars and 38 sales calls conducted in the U.S. and Japan, utilizing Fieldstar International, WOT's Japanese marketing representative. A total of six promotional missions were held in the following locations: Los Angeles (2), Japan (2), New York, and Las Vegas (2).

6. Maximize Return on Investment (ROI) from participation in travel trade and direct marketing programs:

- Participated in the American Bus Association's (ABA) Annual Convention and National Tour Association's (NTA) Annual Convention. ABA Annual Convention produced 26 leads and eleven Wyoming tourism businesses were represented at this Convention. NTA Annual Convention produced 34 leads and was attended by twenty three Wyoming tourism businesses.

- Invited by one of the top tour operators in Wyoming to participate and attended Travel Alliance Partners (TAP) trade show for the third year in a row and collected 32 strong leads.
- Nominated seven Wyoming events for the ABA's Top 100 Events in 2014. The Buffalo Bill Cody Stampede was selected for inclusion in the Top 100 Events for 2014.
- Created seven new itineraries with Domestic Motorcoach Operators from direct requests and assisted seven operators that were adjusting routes or adding tourism product. FAM trips were coordinated and arranged for two Domestic Tour Operators that were developing routing for their motorcoach groups.
- Promoted Wyoming as a vacation destination to the American Automobile Association (AAA). In total, 123 AAA and Canadian Automobile Association (CAA) travel professionals were trained. Wyoming was represented at AAA specific member shows that had over 30,000 members in attendance. The areas of focus were New England, Mid Atlantic, Arizona, Indiana, Ohio and New York.

7. Expand Wyoming film-friendly offerings:

- Marketed Wyoming and the Film Industry Financial Incentive (FIFI) program at the Association of Film Commissioners International (AFCI) Locations Trade Show in Los Angeles, California. Hosted a Montana/Wyoming sponsored reception for industry contacts at the SXSW Film Festival in Austin, Texas.
- Hosted a southwest and northeast FAM tour for film professionals that included locations such as the Red Desert, South Pass City, and Grand Teton National Park.
- Sponsored film premieres in Cody for the 2010 and 2012 Wyoming Short Film Contest winners.
- Promoted the seventh annual Wyoming Short Film contest to attract independent filmmakers with Wyoming storyline projects. Received 52 qualified submissions and 159,000 contest website visits.
- Purchased advertising in trade publications and online targeting producers that could utilize the film incentive program and indie filmmakers for short film contest submissions.
- Utilized social media platforms for the Film Office to promote Wyoming production information and opportunities to in-state film crew and also to market the Wyoming Short Film Contest. Facebook likes are up 45% from 903 at the end of FY13 to 1,310 in FY14.
- Updated Reel-Scout location photography database with new photography from national parks and national forests, raising the total number of locations listed to 948.
- Reel-Scout project inquiries are up from 79 in FY 13 to 99 in FY 14, an increase of 25%. FIFI applications are holding steady at five in FY14, down from six in FY13.
- Provided ongoing consultation and communication with industry stakeholders to focus on in-state development opportunities that directly support an increase in non-resident visitation.

8. Make Wyoming more visitor-friendly and easily accessible by providing interpretive travel information and providing quality service:
- Southeast Wyoming Welcome Center visitation up 64% (2012 – 2013, 98,880; 2013 – 2014, 162,210)*
 - Northeast Wyoming Welcome Center visitation up 13.6% (2012 – 2013, 77,838; 2013 – 2014, 88,398)*
 - Overall Welcome Center visitation up 16.3% (2012 – 2013, 394,697; 2013 – 2014, 458,917)*
 - Data collection from consumer trade shows up 89% (2012 – 2013, 720; 2013 – 2014, 1361)*
 - Participants in Destination Marketing Specialist Program up 90.5% (2012 – 2013, 21; 2013 – 2014, 40) *
 - Recognized Rawlins as Wyoming's first Affiliated Tourism Community.
 - Completed, in partnership with the State Historic Preservation Office, an interpretive plan for the Wind River Indian Reservation. The first of its kind in the country.
 - Completed tourism assessments and provided recommendations for tourism development for the communities of Greybull and Green River.
 - Provided review and comment on all Wyoming Business Council Business Ready Community Tourism Planning Grants.

*All data represents calendar year.

