

**Wyoming Office of Tourism Global Sales & Services
Strategic International Development Plan
2015/2016**

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Priorities:

While the main priority for the Global Sales & Services team continues to be to increase international tourism in Wyoming, there are some areas of focus that are necessary to be successful.

- Partner with and focus on the Travel Trade development in the international markets to increase their knowledge and product offerings.

- Establish benchmark ROI data for each market WOT is currently active and define budget priorities for future growth and a targeted marketing strategy.

- Drive consumer demand by working with Brand USA, media inspiration and co-op marketing promotions with tour operators that reach consumers in targeted markets.

- Provide co-op and cost effective opportunities to WY suppliers to reach the international market.

Representation in market – KBC Travel Group, the UK; Lieb Management, Germany; Fieldstar International, Japan; Davidson Communication, Australia/New Zealand; Eddie Yen (Ad Hoc), Taiwan; Duxin Communications, France; Thema Nuovi Mondi srl, Italy; Target Travel, Benelux Region; Airtouch (Ad Hoc), Nordic Region – PR Connections available in India, Mexico and Brazil through BUSA and JHMR.

Travel Trade: is the collective term for tour operators, travel agents, receptive operators and wholesalers.

- Tour operator:* Develops, markets and operates group travel programs that provide a complete travel experience for one price and includes, transportation (airline, rail, and motorcoach), sightseeing, selected meals and an escort. Some tour operators market directly to the consumer, while other tour operators work through travel agents to reach consumers.

- Travel Agent:* An individual who arranges travel for individuals or groups. Travel agents may be generalists or specialists (cruise, adventure travel, conventions and meetings.) The agents may receive a commission from the accommodations, transportation companies and attractions for coordinating the booking of travel. They typically coordinate travel for their customers at the same or lower cost than if the customer booked the travel on his/her own.

- Receptive Operators* - A receptive tour operator is an operator located domestically that specializes in tourism experiences and manages products and services for incoming visitors most often booked through international tour operators. Receptive tour operators play an important role in the packaged travel industry.

- Wholesaler:* An individual or company that sells tour packages and tour product to travel agents. Tour wholesalers usually receive a discount from accommodations, transportation companies and attractions and pass on a percentage of that discount to the retail agents.

Media: Media coverage plays a huge role in Wyoming's international marketing strategy. Because of significant costs associated with a consumer focused advertising campaign, Wyoming reaches out to consumers through the much more cost efficient strategy of working with in-country media. The majority of the outreach is through meetings at tradeshow, familiarization tours (FAM), and in coordination with the travel trade. By hosting a journalist FAM tour for example, the investment is a fraction of the price when compared to the cost of buying advertising with equal coverage as a story. All journalist's that WOT works with have been vetted and approved through a strict process.

Rocky Mountain International (RMI) was formed in 1990 and coordinates international tourism activities for the state tourism departments of Wyoming, North Dakota, South Dakota, and Montana. RMI is the longest standing and most successful marketing consortium in the nation.

Montana, North Dakota, South Dakota and Wyoming are partnered in a regional cooperative effort, focusing primarily on the markets of Australia, New Zealand, UK, Benelux (Belgium, Netherlands, Luxemburg) France, Italy and Germany (Austria), but also working in the Nordic Region (Norway, Sweden, Denmark, Finland). The region, dubbed The Real America, has made long-term commitments to the regional tourism concept and the four states have been marketing together for nearly 25 years.

Strategic marketing partnerships and regional cooperation are two main keys to effectively reaching the common goal of promoting the Real America region as an outstanding travel destination. In addition to the four states, RMI is also partnered with the specifically targeted international cities of Denver, CO and Minneapolis/St. Paul/Bloomington, MN that serve as entry points to the region making it easily accessible for international visitors.

Moreover, RMI's marketing partnerships extend to various attractions and destinations within the region who want maximum exposure in the international travel community. Included in this group are Yellowstone National Park Lodges, Rapid City CVB, Buffalo Bill's Cody/Yellowstone Country, Western Montana's Glacier Country Tourism, Visit Cheyenne, Jackson Hole Chamber of Commerce, Fargo-Moorhead CVB, Bismarck-Mandan CVB and the Mall of America.

Also very important, the inbound Receptive Tour Operators Rocky Mountain Holiday Tours and America 4 You are official RMI Receptive Tour Operators. As the official receptives, both companies are experts in the region and work tirelessly to facilitate international sales.

RMI is headquartered in Cheyenne, Wyoming with overseas offices located in London, Munich, Amsterdam, Paris, Milan and Sydney. * Information acquired at www.rmi-realamerica.com

Brand USA (BUSA) was established by the Travel Promotion Act to spearhead the nation's first global marketing effort to promote the United States as a premier travel destination and to communicate U.S. entry/exit policies and procedures to worldwide travelers. Formed as the Corporation for Travel Promotion in 2010, the public-private entity began operations in May 2011 and does business as Brand USA.

Brand USA works in close partnership with the travel industry to maximize the economic and social benefits of travel. These benefits include fostering understanding between people and cultures; creating jobs essential to the economy.

The organization's activities are funded at no cost to U.S. taxpayers through a combination of private-sector investment and matching funds collected by the U.S. Government from international visitors who come to the U.S. under the Visa Waiver Program.

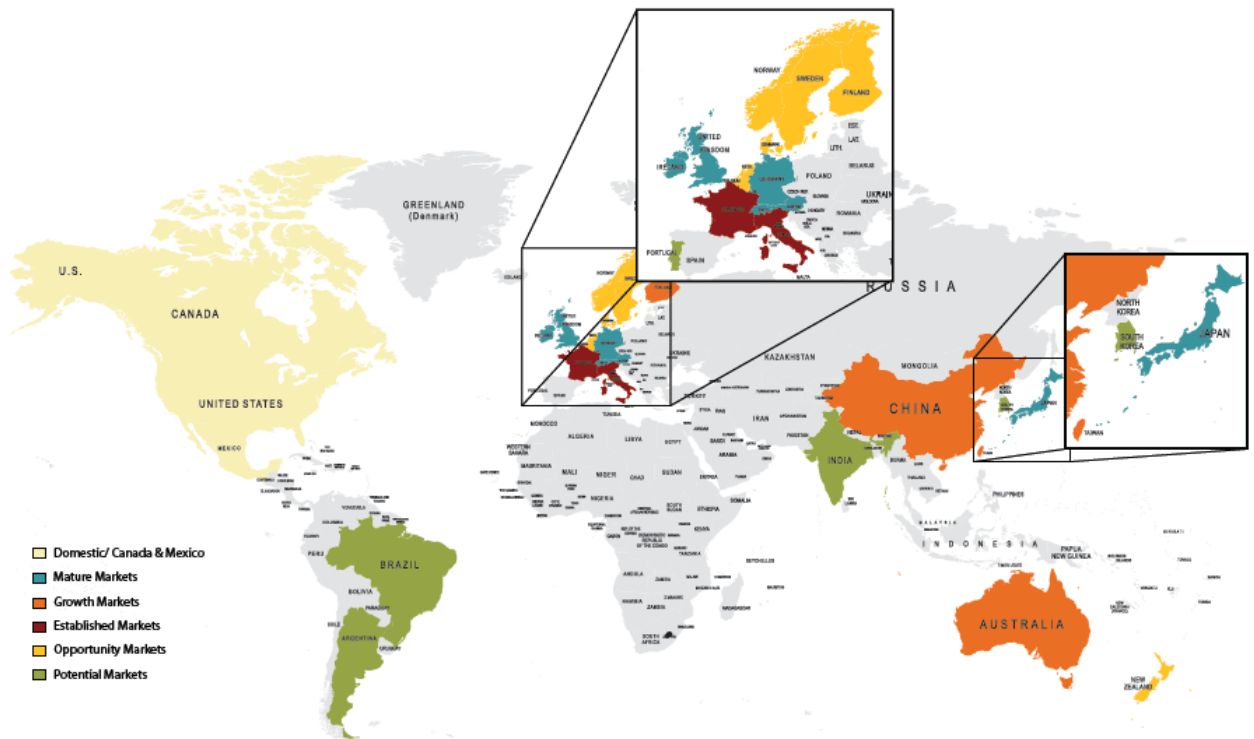
Through its call-to-action—Discover America—Brand USA inspires travelers to explore the United States of America's boundless possibilities.

Brand USA plays a unique role as the nation's first cooperative destination marketing organization. We focus our efforts on delivering programs and platforms that increase awareness and enhance the image of the United States among worldwide travelers in order to influence intent to travel to the United States and, most importantly, visitation and spend. In addition to promoting the United States as a premier travel destination through consumer and travel trade marketing, advertising, events and promotions, we work with the Federal government to communicate US entry and security processes that will help make the journey to and into the United States easier and more welcoming. And as we welcome millions of new international visitors, we make our country stronger—creating jobs essential to the economy and providing opportunities for millions of Americans.

* Information acquired at www.thebrandusa.com



WYOMING GLOBAL PERSPECTIVE



Top Markets:Tier 1 – Domestic Markets

United States (Domestic Trade)

Canada - BUSA

Mexico – PR Connections through JHMR

Tier 2 – Mature Markets

United Kingdom (UK) – KBC Travel Group

Germany – Lieb Management

Japan – Fieldstar International

Tier 3 – Growth Markets

Australia – Davidson Communications

China - BUSA

Taiwan – Eddie Yen

Tier 4 – Established Markets

France – Duxin Communications

Italy – Thema Nuovi Mondi srl

Tier 5 – Opportunity Markets

Nordic Region - Airtouch

Benelux – Target Travel

New Zealand – Davidson Communication

Tier 6- Potential Markets

India- Contact through Sheema Vohra - Sartha

South Korea - BUSA

Brazil – PR Connections through JHMR

Argentina - BUSA

Portugal - BUSA

Tier 1 – Domestic Markets:

The domestic market classification is a little deceiving as it also contains Mexico and Canada along with the United States. The reasoning for this is that reaching the Canadian and Mexican markets is very similar to that of the United States. Where as many of the other international markets focus on working mainly with the travel trade, these markets require a much more in-depth business to consumer (B2C) approach. A strong consumer marketing campaign includes outreach through multiple sources of media such as: television, radio, print, out of home, digital outreach, and social outreach. In the United States the Wyoming Office of Tourism dedicates millions of dollars on the Roam Free marketing campaign annually. With modest funds dedicated to the consumer outreach in both Mexico and Canada in comparison to the US, WOT reaches the consumers in these markets through Brand USA programs, hosting trade and media fams, and through tradeshow. With the new addition of the Public Relations Office – Fahlgren Mortine, the office of tourism is exploring the options of expanded PR and media events in the markets.

Specific Marketing Activities:

- National Tour Association – US based tradeshow focused on motorcoach/group business
- American Bus Association - US based tradeshow focused on motorcoach/group business
- Travel Alliance Partners – US based tradeshow focused on motorcoach/group business
- Ontario Motorcoach Association – Canadian based tradeshow focused on motorcoach/group business
- Search Engine Marketing (SEM) Canadian Markets
- Familiarization Tours originating in US and Canada
- NTA Contact – Educational seminars for Domestic and Chinese trade based in US
- PR/Media Events currently in the US and exploring Canadian opportunities

Tier 2 – Mature Markets:

The *Mature Markets* for Wyoming are the United Kingdom, Germany, and Japan. Wyoming has had representation in the UK and Germany since 1990 and in Japan since 1992. The markets are considered mature due to the strong relationships already established between Wyoming and the travel trade and media. These markets continue to show strong inbound tourism numbers to the US. Outside of Canada and Mexico, these markets rank 1, 2, and 3 respectively. Along with the strong support from the travel trade in these markets, the consumers have a very strong understanding of Wyoming's product offerings and the American west. While some of the travelers still prefer to travel in groups or on motorcoaches, the majority of the travelers are Foreign Independent Travelers (F.I.T) or are on a Fly Drive. WOT continues to support these markets through sales missions, tradeshow, SEM's, fam tours, advertising in publications, tour operator co-op marketing, and through monthly sales calls by the in-market representatives. The importance of these markets to Wyoming's success in the international realm is mirrored by the budget allocated annually.

Specific Marketing Activities:

- Dedicated Representation in the UK market – KBC Travel Group
- Dedicated Representation in the German market – Lieb Management
- Dedicated Representation in the Japanese market – Fieldstar International
- World Travel Market – Tradeshow based in London, England
- Unite & Media Marketplace – UK media focused
- Brand USA Multichannel – Consumer Marketing Outreach
- Rocky Mountain International Roundup – Tradeshow based in the US
- Dedicated in-language websites
- Go West Summit – Tradeshow based in the US
- IPW – Largest International Tradeshow based in the US
- NAI Receptive Tour Operator Summit (RTO) – Tradeshow based in the US
- Tour Operator Co-Op Marketing
- Search Engine Marketing (SEM)
- Familiarization Tours
- Travel Agent Trainings through BUSA
- Consumer outreach through BUSA
- In-Language Publications (Trade Focus)
- Advertising in Top Rated Publications
- ITB – Tradeshow Based in Berlin, Germany
- Japanese Association of Travel Agents (JATA) – Trade/Consumer show based in Tokyo, Japan
- Dedicated Sales Missions to Educate Trade and Media
- East/West Coast Sales Missions – Focused Educating for Japanese Trade located in the US
- In Language Promotional Videos
- Discover America Website and Publication
- Visit USA Members in all markets

- PhocusWright/BUSA Research - UK and Germany



UK Market Summary

Travel Trends

Following a sharp decline in 2009 and negligible growth in the intervening years, there has been an increase of 4% in the number of vacations taken abroad by Brits, up to 37.6 million in 2013 from 36.1 million in 2012 (figures for 2014 are not yet available). Approximately 23 million of these are booked independently and 14 million as a package.

According to the 2014 ABTA Consumer Holiday Trends Report, 53% of Britons took a vacation abroad and 68% took a domestic vacation during the year, a rise of 2% on 2013. The USA is the most popular long haul vacation destination for the British, after Spain and France. ONS year-to-date figures to November 2014 show an 8% increase in British visitation to North America, indicating that the predicted reverse in visitation decline has become a reality.

NTTO figures for 2013 show the UK as the USA's third largest market at 3.84 million visitors after Canada (23.39m) and Mexico (14.34m). The UK remains the largest European market, well ahead of Germany (1.92m) and France (1.5m). UK visitors also rank third in terms of spending at \$13.7 billion, after Canada (\$27.0bn) and Japan (\$18.0bn).

In the long haul market, Thomas Cook, Trailfinders and Virgin Holidays are the major players in the UK to US market. As demand for vacations to the USA has grown in demand, we are seeing operators like Thomas Cook and Virgin actively updating their USA product to offer more choice and diversity. Kuoni has recently expanded their USA product, but their future is currently unclear as they have recently announced they plan to sell the tour operating arm of their business. The dominant operated British Airways Holidays will be introducing a revolutionary new multi-destination booking platform, "Dynamic Packaging", later on in 2015 allowing consumers to tailor-make their own complex multi-centre vacations.

USA and Canada specialist tour operators offering tailor made vacations, such as Bon Voyage, Complete North America, America As You Like It and North America Travel Service, increasingly dominate the market beyond the main gateways of Florida, California and Las Vegas. The past three years have also seen an increase in USA product offered by luxury operators such as Abercrombie & Kent, Scott Dunn, Exsus, Lusso Travel and Audley Travel.

Vacation research and booking patterns are changing. Today consumers use multiple devices (Smart TV, Tablet, Smart Phone, Laptop) and spend on average 4.4 hours of their leisure time in front of more than one screen. To research an upcoming trip 53% of consumers use a smart phone, 70% a tablet and 84% a laptop. Video has become a key decision making tool for British consumers, with roughly 30% of all travel video views being via mobile devices and almost of all travel subscriptions are to vlogs (video blogs) which feature personal travel experiences.

Economics

The UK economy is now in full recovery and is widely accepted as the best performing in Europe, registering 2.6% growth in 2014. Interest rates remain at their historical low of 0.5% but are expected to rise some time during 2015. Unemployment fell to 1.91 million in November 2014, the lowest since 2008, against the peak of 2.7 million at the end of 2011. Exchange rates reflect the strengthening of the pound against both the US Dollar and Euro which encourages UK outbound travel as relative costs reduce. The continuing economic woes of mainland Europe, and Greece in particular, contrast sharply with the improving prospects of both the UK and USA.

New pension rules from April 2015 mean that individuals over the age of 55 will be able to withdraw a tax-free lump sum from their pension pot. This will enable them to spend their retirement fund immediately, and many are looking to invest in a 'holiday of a lifetime.'

Air Passenger Duty rose again in April 2014 making the duty on an economy flight from the UK to the USA £69 per person. As of April 2015, APD will be standardized for all long haul flights meaning duty to the US will be the same as Australia and the Caribbean, opening these destinations to a wider audience and increasing competition for the US. From May 2015 APD for children under the age of 12 travelling in economy will be abolished, and the following year the age limit will increase to 16. On the plus side, as the cost of fuel drops, airlines are now committing to passing these savings on to their passengers by reducing their fuel surcharges on flights by up to £15 per sector.

2015 is a General Election year for the UK and several key issues already stand out as vote winners or losers: the UK's position in Europe; devolution of powers to Scotland, Northern Ireland, Wales and England; immigration; and spending policies. The two major political parties advocate very different fiscal policies: the Conservative imperative is to cut debt and the size of the state, whereas Labour wants potentially bigger budgets for road building, rail, schools and funding the police and prisons, with less focus on repayment of the national debt.

*Includes passenger fares, food, lodging, recreation, gifts, entertainment, local transportation and other incidental expenditures to a foreign visit. Source: Office of Travel and Tourism Industry (OTTI) 2013



Germany Market Summary

GERMANY - Population 80.1 million

Germany is Europe's largest economy, the 6th largest long-haul source market in the world

AUSTRIA – Population 8.2 million & SWITZERLAND – Population 8 million

Switzerland: With one of the world's highest per capita incomes, the Swiss have low unemployment and an attractive percentage of disposable income

Austria has one of the most stable economies in Europe (fostering tourism spending), a high standard of living and is closely tied to other European economies, especially Germany's

Germany - Tour Operators & travel agents

The package holiday still remains the most important form of organization

Tour operators are the main suppliers of travel products to the consumer. They influence and control the buying patterns of consumers by advertising, marketing, distribution and product placement.

With 9.829 travel agencies as of January 2015, Germany has one of the highest densities in the world.

The travel agency is still the most important booking channel and after a long downward trend due to the success of online bookings, Germany now registers an increase in the number of travel agencies and rising revenues again. The growth of online travel agents, on the contrary, is currently stagnating.

Germany - Tourism market 2014 and outlook for 2015

2014 was a good year with 2015 expected to be even better!

According to the recent travel study by FUR, the Germans' wanderlust has increased in the last 10 years - the biggest interest can be found in North America.

Economic conditions in Germany remain good for consumers with low inflation, rising salaries and rising employment, and according to various market surveys and forecasts issued in recent weeks the German holiday market is set for continued solid low growth this year

All indicators on the German tourism market are pointing upward with the expectation for 2015 being an increase both in the number of holiday trips being taken as well as holiday spending.

German speaking market – Latest Booking Trends to USA (Travel Trade Barometer)

Long-haul travel Germany to USA remained steady despite the challenging economy in Europe.

According to OTTT German travel to the U.S. increased by 2.7 percent in 2014 to 1.96 million visits

German travel to the US is forecasted to annually grow on average by 2 % over the next years.

The number of Swiss visitors to the US increased by 2.8% to 486,500

In 2014, the number of Austrian travelers to the US was 193,450, a 4% plus over 2013.

Germany - Year-End 2014 Bookings to USA (Travel Barometer)

The top German trade – selling nearly 75 percent of the bookings to the U.S. - projected that year-end 2014 bookings to the U.S. increased 4-6 percent on average

For 2013 the top German tour operators had reported German travel shifted to the U.S. west - to California and Las Vegas (both growing faster than most regions and gaining market share).

In 2014, based on the top German operator's bookings, California and Las Vegas will continue to increase market share.

Trends for 2015:

The most popular types of vacation travel in 2015: beach, relaxation, nature and family holidays.

The part of the senior population that takes vacations is continuously growing, with nearly half of the retired Germans going on vacation in 2014.

According to a consumer survey 25% of Germans plan to take more vacations this year than in 2014.

According to the Reiseanalyse survey, 2/3 of all holiday travel by Germans will be spent in Europe and neighboring countries. Long-haul destinations can reckon with a larger share of the remaining third of the travel market.

In general, 2015 is forecasted to become a very good year in tourism with a slight growth potential for the German market (and with 2014 having already been a good year) and under the assumption of a largely stable financial situation of the private households.

*Includes passenger fares, food, lodging, recreation, gifts, entertainment, local transportation and other incidental expenditures to a foreign visit. Source: Office of Travel and Tourism Industry (OTTI) 2013



Japan Market Profile

Japan's visitor volume grew just 1% in 2013, remaining well below its 1997 record of 5.4 million visitors. Japan's modest performance in 2013 followed sharp increases in visitation to the United States (14%) and to the world in 2012. Japan accounted for a 5.3% share of 2013 visitor volume. Spending by visitors from Japan has fully recovered and at \$16.5B in 2013, finally surpassed the previous record set back in 1995.

- In 2013, the average Japanese traveler
 - 86% interested in shopping
 - 85% interested in sightseeing
 - 23% interested in guided tours
 - 12% interested in National Parks/Monuments
 - Books their trip 78 days in advance – up from 72 days in 2012
 - Stays 6.6 nights – down 0.8% from 2012
 - Visits 1.1 states on average – no change from 2012
 - Has a mean household income of \$101,198 – down \$14,789 from 2012

ARRIVALS

- In 2013, 3.73 million Japanese travelers visited the U.S.—a 1-percent increase from 2012.
- Japan accounted for a 5.3% share of 2013 total visitor volume.

ECONOMIC IMPACT

- Japan travel exports to the U.S. increased to \$17.6 billion in 2013—up from \$16.5 billion in 2012. Average spending per household in 2013 was \$5,035.

LOOKING FORWARD

- The number of Japanese travelers to the U.S. is expected to decrease three percent to 3.62 million in 2014, and to grow by an average of 0.6 percent per year thereafter.

BOOKING HABITS

- The Japanese enjoy having printed materials such as guidebooks to make their decision on where to go, however 69% of Japanese use websites to research and select their travel destination.
- The most popular time of year for Japanese travel is December, January and August.

*Source: US Travel Association,
US Dept of Commerce, The Brand USA*

Tier 3 – Growth Markets:

The *Growth Markets* for Wyoming are Australia, Taiwan, and China. The classification as growth is due to their increasing number of visitors to the United States as well as the relatively new relationships being built with the top media and travel trade. Wyoming has had representation actively promoting in Australia since 1990 and with the recent increase in airline lift and the value of the Australian dollar compared to the US dollar, those efforts have been paying off heavily. Taiwan and China with the assistance of the Visa Waiver program have both shown extreme growth in inbound US visitors and are projected to continue at a staggering rate through 2020. As with any market it is important that WOT focuses its efforts on reaching the travel trade that best match the available Wyoming product in terms of time, cost, and interest. Currently WOT does not have dedicated in market representation in Taiwan or China but is reaching the travel trade through international trade shows held in the US, working with receptive tour operators located in the US, through Brand USA and by working with representation on focused marketing events in-market.

Specific Marketing Activities:

- Dedicated Representation in the Australian market – Davidson Communication
- Ad Hoc Representation in the Taiwanese market – Eddie Yen
- Rocky Mountain International Roundup – Tradeshow based in the US
- Dedicated in-language website - Australia
- Go West Summit – Tradeshow based in the US
- IPW – Largest International Tradeshow based in the US
- Tour Operator Co-Op Marketing
- Familiarization Tours
- Travel Agent Trainings through BUSA - Australia
- Consumer outreach through BUSA
- In-Language Publications (Trade Focus) - Australia
- Advertising in Top Rated Publications
- Active America China – Chinese focused Tradeshow based in the US
- NAI Receptive Tour Operator Summit (RTO) – Tradeshow based in the US
- NTA Contact – Educational seminars for Domestic and Chinese trade based in the US
- In Language Promotional Videos
- Dedicated in-language Website – Australia
- Discover America Website and Publication
- International Travel Fair (ITF) – Trade/Consumer show located in Taipei, Taiwan
- Visit USA Members in Australia
- PhocusWright/BUSA Research - Australia



Australia and New Zealand Market Summary

Australia and New Zealand, the region referred to as Oceania, has continued to deliver strong growth for visitation to the USA (up 7.9% YTD to October 2014) with Australia providing 82% of these visitors and retaining the #10 position in the top ten countries for visitation numbers.

Australia and New Zealand as a market has experienced some key economic changes that may impact it as a growth market for RMI in the 2014/15 year to date and going forward.

Economic changes for Australia including a 17% currency depreciation against the USD in the past 6 months, may negatively impact travel decisions to the US; however lower interest rates and petrol prices have weighed in on the positive side with consumers gaining a greater discretionary income and it is anticipated further economic stimulators to drive consumer spending will occur in the short/medium term.

New Zealand has enjoyed a period of stable growth and economic stability during this period.

Statistics: Outbound Tourism To USA from Oceania (AU & NZ).

Australians are still travelling to and spending money in the United States in record numbers. Despite spending a record-setting \$6.8 billion in the United States last year, Australia was unable to keep pace with the growth of spending from visitors from South Korea and therefore dropped to 10th in terms of total spending in the United States last year (but has a commanding lead over France, currently ranked 11th) and is the tenth-largest market for inbound travel to the United States.

It is estimated that between 2013-2019 Australian travel to the United States will grow by 25 per cent (down to the 9th largest growth rate of the top ten inbound markets), with expected total arrivals of 1,510,000 Australians to the United States in 2019 of which 1,131,000 are expected to be leisure visitors (putting Australia up to 6th in the top ten for this category). **

In 2013 Australia there were 1.21 million visitors to the US- a strong 7% increase registering its 9th straight record year. This market has produced monthly performance growth in 46 of the past 48 months—one of the best performances of any origin country. Australia accounted for a 1.7% share of 2013 visitor volume.

To October 2014 there were 1,303,770 visitors to the US from Australia/ NZ combined, up by 7.9% (Australia up by 5.2%) with Australia providing 82% YTD of the total of non-resident visits from Oceania.

New Zealand arrivals were up by 23% YTD in October 2014.

Sources:

++ US Commercial Service Update 15/1/2015

** Courier Magazine Feb 2015 <http://digital.ipcprintservices.com/publication/?i=243235>

Full RMI Representation in AU/NZ

Davidson Communications has begun the year of full representation in this growth market. This has delivered an increased level of activity and success across all strategic platforms:

Media

Media engagement, interest in and attendance on fairs and editorial support negotiated at record levels.

Further support from completed successful media advertorial projects including Lets Travel and Adventure World's Australian National Geographic Magazine added increased national exposure to and education of target consumers.

Trade

Training at state and regional expos (see visit USA below)

Tour operator and wholesaler outreach / sales calls increased and

Co-ops with Adventure Destinations and Destination America* completed

Interest in attending RU increased but dates/ product levels / staffing levels/ dates for Canada

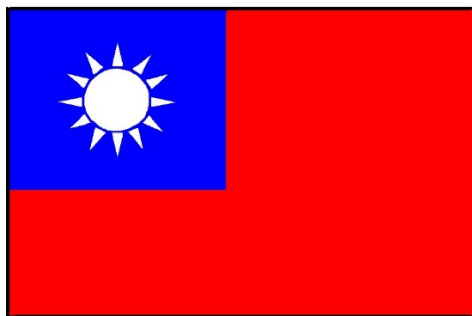
Rendezvous and IPW remain challenges

Mega Fairs – attendance by 2 for SD/ND and 1 for WY/MT in 2014

Interest in and proposal for trade co-ops, training

*Destination America closed unexpectedly late in 2014 after co-op brochure distribution had been completed- however sales fulfilment has been taken over by Adventure Destinations

Visit USA and Brand USA engagement has been increased (outlined separately) with attendance at National and regional expos and provision of training sessions and materials. Direct marketing to consumers via websites and media exposure intensified and a concentrated emphasis on relationship and product building, recruitment for Roundup and Megafairs being currently undertaken with trade.



Taiwan Market Profile

Taiwan ranks number 20 in international travelers to the United States in 2013, up from number 22 in 2012.

- In 2013, the average Taiwanese traveler
 - 89% interested in shopping
 - 80% interested in sightseeing
 - 25% interested in small towns/countryside

- 20% interested in National Parks/Monuments
- Books their trip 55 days in advance – up from 52 days in 2012
- Stays 20.7 nights – up 0.8% from 2012
- Visits 1.3 states on average – no change from 2012
- Has a mean household income of \$79,811 – down \$7,640 from 2012

ARRIVALS

- In 2013, 385,000 Taiwanese travelers visited the U.S.—a 33-percent increase from 2012.

ECONOMIC IMPACT

- Taiwan travel exports to the U.S. increased to \$2.1 billion in 2013—a 13-percent increase from 2012.

LOOKING FORWARD

- The number of Taiwanese travelers to the U.S. is expected to increase five percent to 404,000 in 2014, and to grow by an average of four percent per year thereafter.

BOOKING HABITS

- While personal recommendations from family and friends weigh heavily in the Taiwanese travelers' destination selection, using websites such as OTA's and airline sites is where the majority of Taiwanese research and book their travel.

*Source: US Travel Association,
US Dept of Commerce, The Brand USA*



China Market Profile

China is one of the fastest-growing U.S. inbound travel markets and has been consistently moving up the ranks as one of the largest. Chinese visitors also spend more than other travelers. A bilateral agreement to extend travel visa validity from one to ten years, effective November 2014, will likely have an immediate impact on a further increase of Chinese visitations.

- In 2013, the average Chinese traveler
 - Is looking for unique experiences
 - 85% interested in shopping
 - 78% interested in sightseeing
 - 73% interested in ecotourism and nature

- 67% interested in Cultural historical attractions
- 37% interested National Parks/Monuments
- books their trip 60 days in advance – down 9.5% from 2012
- stays 39.3 nights – down 2.3% from 2012
- visits 1.7 states on average – down 0.1% from 2012
- has a mean household income of \$78,779 – up \$4,824 from 2012

ARRIVALS

- In 2013, 1.8 million Chinese travelers visited the U.S.—a 23-percent increase from 2012 – making it the largest growth rate among the top ten international markets.
- China was the fifth-largest overseas inbound travel market to the United States in 2013.

ECONOMIC IMPACT

- Chinese travel exports to the U.S. increased to \$21 billion in 2013—up from \$8.8 billion in 2012. China was the United States’ largest overseas travel export market in 2013.
- Average spending per Chinese household was \$7,400 in 2013, the highest of all international visitors.
- Travel is the second-largest U.S. export to China, accounting for 13 percent of all exports of U.S. goods and services to China.

LOOKING FORWARD

- Chinese visitation to the U.S. is expected to increase to 2.2 million in 2014 and to 4.9 million in 2019—positioning China as the top U.S. overseas inbound travel market in five-year’s time. The recent news on increased visa validity will likely have a significant impact on increased visitation from 2015 onwards.

BOOKING HABITS

- While personal recommendations from family and friends weigh heavily in the Chinese travelers’ destination selection, using websites such as OTA’s and airline sites is where 64% of Chinese research and book their travel.
- Chinese interest and availability in using the internet for research and booking continues to rise and when they return from their trip, they are very likely to write about their experience via their social media channels.
- The most popular time of year for the Chinese to travel is in October during Golden Week.

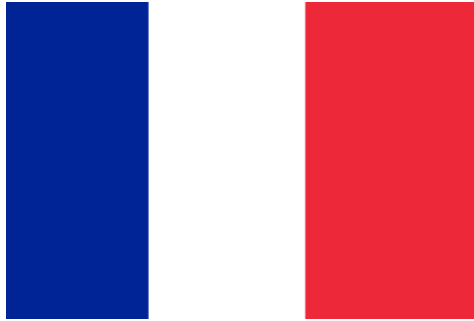
*Source: US Travel Association,
US Dept of Commerce, The Brand USA*

Tier 4 – Established Markets:

The *Established Markets* for Wyoming are France and Italy. The classification as established is due to their steady number of visitors to the United States as well as the relationships that have been built with the top media and travel trade. Wyoming has had representation actively promoting in Italy and France since 1992. These two markets are both projected to continue at the current level of inbound visitors through 2018. Both Italy and France are markets that visitors still continue to do the majority of their bookings through the travel trade due to the insurance if issues arise. As established markets that aren't projecting huge growth numbers, WOT will look to invest in marketing opportunities in these markets at a reduced level with the majority of the outreach taking place through FAM tours and international shows located in the US.

Specific Marketing Activities:

- Dedicated Representation in the French market – Duxin Communications
- Dedicated Representation in the Italian Market - Thema Nuovi Mondi srl
- Rocky Mountain International Roundup – Tradeshow based in the US
- Dedicated in-language website – Both Markets
- Go West Summit – Tradeshow based in the US
- IPW – Largest International Tradeshow based in the US
- Tour Operator Co-Op Marketing
- Familiarization Tours
- Consumer outreach through BUSA
- In-Language Publications (Trade Focus) – Both Markets
- NAI Receptive Tour Operator Summit (RTO) – Tradeshow based in the US
- Discover America Website and Publication
- Dedicated Sales Mission - France
- In-market Abbreviated Sales Mission in Collaboration with Larger EU Tradeshow - Italy
- PhocusWright/BUSA Research - France



France Market Summary

The situation in France is interesting as this reflects the French paradox.

On one hand, the economic situation is still concerning and the President is not reassuring the French with his possibilities to find solutions to the crisis. Life is more expensive and more taxes were created on private people and companies. Which is not motivating for investors. As a logical result, many French are discouraged wondering about their future. Several young entrepreneurs decided to move to other countries where this is easier (and less expensive) to create businesses. As a logical consequence, the number of jobless people has increased significantly this last year.

On the other hand; the French are more motivated than ever to take a break therefore go for vacation to escape from the stress. Most of the French employees have, at least, 5 weeks paid vacation. The consumers will optimize these weeks splitting in 3 kinds of vacations. The most important part will be taken in the summer time with family. The two other parts will be used during winter or on long weekends. Many French are traveling outbound for this long summer time. The USA became, more than even, a destination that appears to offer secured opportunities with wide range of styles of vacations. Many families are ready to spend significant amount of money (the French are spending average of 4 387 Euros per pax per year) but they are ambitious about that time spent. So they will search information on the Internet, visit with travel agencies to choose where they will go. In FRANCE, the spouses will make 52% of the decisions about the destination. 82% French consider travel as a very important part of their life style and 33% of them prefer off the beaten path while traveling. Which confirms the interest of the RMI Region on this market.

The French Trade is adapting to the new times. Big tour operating companies that sell mass tourism packages are now trying to sell more tailor-made products as they still suffer from the economic situation. Tour operating companies that offer high-end, genuine packages are successful. We see also the niche tour operators making significant growth even if they sell expensive packages. So there is no doubt there are opportunities on this market to develop more tourism from FRANCE to the RMI Region that is equipped with huge potential, in many sectors to fulfill expectations from many French dreamers.



Italy Market Summary

Twenty-thirteen outbound tourism from Italy remained stagnated due to persistent the economic and financial situation, which has also stagnated wages and likewise affected Italian travel behavior. Consumer confidence slowly increased throughout the year and into 2014. Over the last 9 months, Italian travel to the U.S. rebounded and increased by 15% YTD.

Projections indicate that Italian tourism to the United States will continue to grow over the next 3 years at a rate of 2% - 3%. Italy remains one of America's top suppliers of inbound travelers from Europe. Furthermore, Italians remain the largest per capita spenders in Europe with an average of \$4,938 spent per person per trip. The United States continues to rank first among non-European destinations with 4.6% market share. The U.S. is also the preferred non-European destination for business travels with a 12.4% share.

It is expected that over the forecast period outbound tourism will increase to 20 million trips and value sales of €22.2 billion at constant 2013 prices by 2018, thanks to expected economic recovery, which will increase Italians' available income. Italy has Europe's highest per capita spending trend when traveling in the U.S. In 2013 Italians spent an average of \$4,938 in total tourism exports with an 8% increase from the previous year. The top three European markets: U.K., Germany and France have a much lower average per capita spending of \$3,576, \$3,934 and \$3,906 respectively.

Italian GDP is expected to grow in 2014 and 2015 by respectively 0.3% and 1.1%. Although forecasts indicate a drop in overall Italian travelers until 2015, there is still large potential for increased arrivals to the United States.

Italians' Spending in the United States: 2013 set a new record for spending trends with over \$4.143 billion in total spending and \$3.012 billion in travel receipts. As mentioned above, Italy is one of the world's largest spenders for U.S. tourism services mainly for hotel accommodation, restaurants, car rentals and sightseeing tours. The mean average household income of the Italian traveler is steadily increasing at \$87,500 per annum with over a 20% increase in the wealth of the average traveler. This partly explains why Italians have the highest per capita spending in the US compared to other European countries.

Other valuable info: Mobile phones are increasingly characterized by an ongoing switch to smart

phones; Smartphone' penetration rate grew from 62% in 2010 to 112% in 2014. Smart phones' replacement cycle is getting shorter, as Italians like to always be up-to-date with recent models and technologies. Italians appreciate Smartphone's' multi-functionality and versatility, leading to this category's growth at the expense of portable players which only have one function.

Technology players, such as Google, Facebook, Trip Advisor and the meta-search engines, are playing an increasingly important role in the travel industry, driving online traffic and having a major impact on competition among industry players. The online travel agency sector is seeing increasing consolidation, with Expedia and Priceline emerging as its dominant players. Expedia accounts for more than 15% of all travel booking from Italy towards the U.S.

Italian tour operators are generally small-medium size companies and cover market niches.

Leading global tour operators, such as ALPITOUR, HOTELPLAN, ALIDAYS, NAAR just to mention a few are currently changing their business models to make their websites their main distribution platforms. Over the forecast period travel and tourism in Italy is expected to perform well, and to see an increase in most markets. Such a trend is expected to be an important consequence of economic recovery, which will give Italian travelers more opportunities for domestic and outbound tourism. At the same time, economic recovery will be an important determinant of inbound tourism from other European countries, as well as from BRIC countries and other emerging countries, with a positive impact on the whole market. In addition the Expo 2015 to be held in Milan is expected to further contribute to the performance of travel and tourism in the country, as it represents an event, which will attract many more visitors, who are then expected to remain for longer in the country and visit other locations. A mild recovery of the Italian economy is expected from 2015, economic improvement is also predicted to positively impact consumer confidence and sales. It is expected that over the forecast period travel retail value sales will increase both offline and online, reaching €16.5 billion and €5.5 billion respectively at constant 2013 prices by 2018. These good performances will also be linked to the expected economic recovery.

Tier 5 – Opportunity Markets:

The *Opportunity Markets* for Wyoming are New Zealand, the Nordic Region (Norway, Sweden, Denmark, Finland), and the Benelux Region (Belgium, the Netherlands, Luxemburg). This country and two regions are in the classification as opportunity due to their relatively small number of visitors sent to the US annually. New Zealand has a very low number of travel trade opportunities and a small population. The Nordic Region sends roughly 2.5 million visitors to the US each year with little projected change. WY has built strong relationships with the largest tour operators in the region as well as the top media outlets since conducting the first sales mission in 2005. The marketing in the Nordic Region will continue to reflect the relatively low ceiling of growth while still reaching the visitors through the framework in place.

The Benelux Region is very similar to the Nordic region in terms of projected growth and opportunity. The three countries of Belgium, the Netherlands, and Luxemburg have strong value with limited upside to increased marketing. The majority of the outreach in these countries are done through the internet and digital campaigns. The marketing in the Benelux region will remain at a reduced level through in-market representation, international shows held domestically, and small distribution of materials at the large tradeshows in country through the travel trade.

Specific Marketing Activities:

- Dedicated Representation in the Benelux market – Target Travel
- Limited Representation in the Nordic Region - Airtouch
- Rocky Mountain International Roundup – Tradeshow based in the US
- Dedicated in-language website – Both Markets
- Go West Summit – Tradeshow based in the US
- IPW – Largest International Tradeshow based in the US
- Familiarization Tours
- Consumer outreach through BUSA
- In-Language Publications (Trade Focus) – Benelux
- NAJ Receptive Tour Operator Summit (RTO) – Tradeshow based in the US
- Discover America Website and Publication
- In-market Abbreviated Sales Mission in Collaboration with Larger EU Tradeshow – Nordic Region
- Discover America Members – Nordic Region
- Brochure distribution at Vakantiebeurs - Netherlands



Nordic Region Summary

Despite of the economic downturn the number of travellers to US is in positive trend.

The total Nordic (Denmark, Finland, Iceland, Norway, Sweden) arrivals to the United States amounted to 870,969 Jan-Aug 2014.

Nordic people enjoy 6 weeks of paid vacation and 11 work days are considered national holiday. Travelling has a very high priority, and Nordic people travel more than any other European, spending more that USD 20 billion of travels each year.

They travel multiple times a year. Vacations are allocated throughout the year with 3-4 weeks summer vacation (June-August), multiple prolonged weekends in fall and spring and 1 week winter vacation. Also Easter week is considered a 10 day vacation in Norway.

USA is the number one long haul destination in Denmark, Norway and Sweden. And nbr. 2 (after Thailand) in Finland. USA has been also voted as “The premier tourism destination in the world” at several Travel Awards in Denmark, Sweden and Norway. (There are no Travel Awards held in Finland.)

With the rise of social media and the current focus on individuality, Nordic people want to go where the neighbors have not yet been.

Special interest travel and group travels (i.e. 3G, friends, same interest...) are steadily increasing, especially active vacations. Popular hobbies include golf, running wine&dine, biking and sailing. Yoga and Spa travel is also getting more and more popular. Also large sport events such as triathlon, marathons, bike races, increasingly attract travellers – both as participants and spectators.

Roundtrips and group tours are getting more and more popular. There are an increasing number of both tour operators and travel agencies who produce tours with dedicated departure dates in their catalogue (either print or web). These tours are not anymore “your typical coach tours for people who are afraid to travel alone” what we have been accustomed in the past. Instead there are tours to different type of travelers and interest groups.

*Includes passenger fares, food, lodging, recreation, gifts, entertainment, local transportation and other incidental expenditures to a foreign visit. Source: Office of Travel and Tourism Industry (OTTI) 2013



Benelux Market Summary

Traditionally the Dutch are known as passionate travelers. They consider their annual vacation a right rather than a privilege. In Belgium, The Netherlands and Luxembourg, employed staff receives “vacation money”, some 8% of their annual gross income and paid between May 1 and June 30. Besides this additional income everyone receives 25 vacation days. Additionally there is an average of 9 Bank Holidays.

For 2014 OTTI is expected to report around 850,000 visitors to the USA from the Benelux and for 2015 forecast is a further growth of visitors. Important to realize is that 3 out of every 100 Benelux inhabitants will travel to the USA.

The trade landscape is drastically changing in our market. The number of travel agencies in the Netherlands already decreased to 1,100 and it is expected that this downward trend will continue till eventually 600 agencies remain. The number of homeworkers on the other hand is growing rapidly, as are the franchise chains that they can join. Expectations are that this growth will stabilize and only the true entrepreneurs and specialists will remain.

The tour operator landscape is showing a similar change. Looking at long haul destinations, the (online) specialists are growing quickly. They all have good websites, they are easy to find, most of their staff has visited the USA several times and they sell mostly tailor-made itineraries.

The Benelux market is very online-driven; less than 15% of the travelers to the USA book a package tour. This also fits the profile that the Benelux traveler is an independent traveler, looking for an individual experience. The average traveler from the Benelux will travel more than once in a lifetime to the USA, which makes secondary destinations like RMI more and more popular. In general a party (average number of people 3) will make a round trip of about 13 days, travelling mostly by car, sometimes by RV. As the average budget to spend on a vacation is \$ 3500.- p.p. (including airfare), the average spending per day is approximately \$ 200.-.

Over 85% of the travelers use the Internet as an inspiration to make a choice for a destination. Social

media is getting more and more important as a tool. Facebook is still the number one in the Benelux and tour operators and direct sellers are using this medium to create platforms.

*Includes passenger fares, food, lodging, recreation, gifts, entertainment, local transportation and other incidental expenditures to a foreign visit. Source: Office of Travel and Tourism Industry (OTTI) 2013

Tier 6 – Potential Markets:

The *Potential Markets* for Wyoming as of today are India, South Korea, Brazil, Argentina, and Portugal. While all markets could be considered potential markets, these five markets are being monitored due to their projected number of visitors they will be sending to the US, economy, interest levels, ability to reach the US, Visa Waiver Countries, ability to consumers through travel trade and media at reasonable costs. Currently WOT has limited outreach to these markets, with the majority coming through FAMs and international tradeshows located domestically. Going forward, WOT will work with interested DMO's, Brand USA, OTTI (Office of Travel and Tourism Industries), US Commercial Service, Discover America, and regional partners to obtain detailed research to garner a stronger understanding of the markets and how to build out an effective marketing plan if feasible.

Specific Marketing Activities:

- Go West Summit – Tradeshow based in the US
- IPW – Largest International Tradeshow based in the US
- Familiarization Tours
- NAJ Receptive Tour Operator Summit (RTO) – Tradeshow based in the US
- Discover America Website and Publication



India Market Profile

India ranks No. 1 in terms of the share of travel in total U.S. exports, which accounts for a quarter of the \$36 billion of U.S. exports to the country. While more than a third of travel exports reflect the substantial number of Indian students studying in the U.S., Indian visitor spending is no less significant. With the average visitor spending \$6,165, India ranks fifth amongst international markets.

- In 2013, the average Indian traveler
 - 80% interested in shopping
 - 72% interested in sightseeing
 - 46% interested in cultural historical attractions

- 28% interested in National Parks/Monuments
- Books their trip 46 days in advance – up from 41 days in 2012
- Stays 41.8 nights – up 1.7% from 2012
- Visits 1.6 states on average – no change from 2012
- Has a mean household income of \$56,573 – down \$534 from 2012

ARRIVALS

- In 2013, 859,000 Indian travelers visited the U.S.—a 19-percent increase from 2012.
- The U.S. is the largest non-Middle Eastern long-haul destination for Indians, commanding a 12-percent market share of Indian long-haul travel.

ECONOMIC IMPACT

- Indian travel exports to the U.S. increased to \$8.9 billion in 2013—up from \$4.9 billion in 2012. Average spending per household in 2013 was \$7,013.
- Travel is the largest U.S. export to India, accounting for 25 percent of all exports of goods and services.

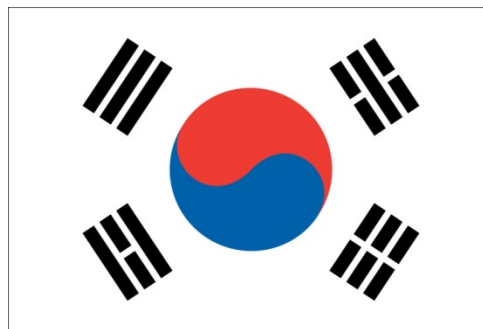
LOOKING FORWARD

- The historic trend in U.S. arrivals has generally reflected the exchange rate and terms of trade with India. Since 2012, however, arrivals have increased sharply despite a depreciating rupee. Indian visitations to the U.S. are expected to continue to increase notwithstanding a projected further depreciation of the exchange rate.
- The number of Indian travelers to the U.S. is expected to increase nine percent to 936,000 in 2014, and to grow by an average of six percent per year thereafter.

BOOKING HABITS

- While personal recommendations from family and friends weigh heavily in the Indian travelers' destination selection, using websites such as OTA's and airline sites is where 56% of Indians research and book their travel.
- The most popular time of year for Indian travel is April and May.

*Source: US Travel Association,
US Dept of Commerce, The Brand USA*



South Korea Market Profile

South Korea registered another solid increase in 2013 to set a 4th consecutive arrivals record at 1.36 million visitors to the US. Since inclusion in the Visa Waiver Program in late 2008, South Korea's annual performance had been uneven at -2%, +49%, +3%, but is now a stable +9% for the 2nd consecutive year. South Korea accounted for a 1.9% share of 2013 visitor volume.

- In 2013, the average South Korean traveler
 - 81% interested in sightseeing
 - 76% interested in shopping
 - 62% interested in cultural historical attractions
 - 25% interested in National Parks/Monuments
 - Books their trip 70 days in advance – up from 56 days in 2012
 - Stays 19 nights – down 0.3% from 2012
 - Visits 1.4 states on average – no change from 2012
 - Has a mean household income of \$76,740 – down \$6,181 from 2012

ARRIVALS

- In 2013, 1.4 million South Korean travelers visited the U.S.—a 9-percent increase from 2012.
- South Korea accounted for a 1.9% share of 2013 total visitor volume.

ECONOMIC IMPACT

- South Korean travel exports to the U.S. increased to \$7 billion in 2013—up from \$6 billion in 2012. Average spending per household in 2013 was \$3,931.

LOOKING FORWARD

- The number of South Korean travelers to the U.S. is expected to increase six percent to 1.44 million in 2014, and to grow by an average of 4.5 percent per year thereafter.

BOOKING HABITS

- While personal recommendations from family and friends weigh heavily in the South Korean travelers' destination selection, using websites such as OTA's and airline sites is where 68% of South Koreans research and book their travel.
- The most popular time of year for Indian travel is July and August.

*Source: US Travel Association,
US Dept of Commerce, The Brand USA*

Top Origin Markets – from Asia to the U.S.

1. Japan
2. China
3. S. Korea
4. India
5. Taiwan

Asia-Pacific: This world region is expected to produce a 44 percent increase in visitors by 2019. Japan, the largest Asian market and second-largest overseas market, is forecast to decrease over the first half of the forecast period then rebound slowly to produce a total decline of 40,000 travelers by the end of 2019. Thus, 2019 volume will remain well below the 1997 record level of 5.4 million. High growth rates and large growth volumes are expected for China (24%), India (9%), and South Korea (6%) in 2014. Similarly, these countries are expected to have among the largest total visitor volume growth of any country from 2013 through 2019. China is expected to increase a total of 3.1 million visitors, or 172 percent through 2019, and produce the third-largest number of additional visitors behind Mexico and Canada. South Korea should produce an additional 428,000 visitors (+31%), while India could add 406,000 additional visitors (+47%). Australia dominates the Oceania region and is projected to increase 305,000 visitors, or 25 percent between 2013 and 2019. – *Source: US Department of Commerce*

International Co-Op Programs:

DiscoverAmerica.com Assistance Program

The Wyoming Office of Tourism received a one-time supplemental budget totally \$40,000.00 to be committed to expanding content on discoveramerica.com (DA.com). Discoveramerica.com is BrandUSA's website that is used to promote inbound travel to the United States. Each state, including Wyoming, has a page dedicated to their own content – including photos, videos (in-language), highlighted areas, and other BrandUSA's content from their different programs that the state has participated in. The costs associated with doing a standalone; direct to consumer marketing campaign internationally would be millions of dollars, which isn't feasible for Wyoming to spend. However, by working with BrandUSA, WOT is able to partner with the different programs they offer to become part of major campaigns that reach consumers in targeted markets at deeply discounted rates.

DiscoverAmerica.com offers each state the opportunity to expand their content on the website for \$8,000.00. WOT will be using supplemental monies to cover this expense. This leaves a total of \$32,000.00 for additional content purchasing.

The discoveramerica.com website now has City/DMO pages available for \$6,650.00. This would allow WY partners to have connections to the BUSA's marketing campaigns as well as connections to WOT's page on the site, in turn expanding Wyoming's content.

One other program that is offered by BUSA to expand international content is the in-language video production. This program allows the partner to choose which language they would like to have the video produced, if the video will be a voice over or have an actor/actress from the country of choice, the script, where the actor/actress will visit/experience, and what time of year will be the focus. The video then is added to the Wyoming page of discoveramerica.com, the partner is also given a digital copy of the video for usage on their own site. This program is fantastic for building out the content on multiple mediums. Going forward, WOT will have welcome pages in language that would also contain these videos. The cost to produce these in-language video is \$7,175.00.

With the remaining \$32,000, WOT will offer a co-op for interested WY partners (DMO) to participate in one of the above opportunities (DMO website or in-language video). WOT would match \$3200.00 towards these for the first 10 interested partners. If all of the funding isn't spent with the first round, WOT will open it up for additional co-op funding.

Wyoming International Advertising Co-Op

Publications

The majority of the advertising WOT buys internationally is in unison with Wyoming articles, suggested by the in-market representatives, or used to support a tour operator. While the advertising component isn't as massive as some of the other programs, it is still important. Going forward, any advertising that WOT does internationally, either through RMI or alone, a discounted rate will be attempted to be negotiated with the publication for additional WY partners to participate. The communication between WOT and WY DMO's will remain strong as to pass along any such marketing opportunities.

There are also currently six DMO's that participate in the Discover America Inspirational piece through Miles media. By going directly to Miles media, BUSA isn't able to unlock additional funds to promote travel to the US. WOT would like to expedite the billing through Wyoming's LOA. While this wouldn't drop the cost for partners, it would assure that there is a LOA being used to unlock more BUSA tourism funding.

Technical Assistance Program Co-Op

Translations

Currently, the Wyoming Office of Tourism works with the RMI in-market offices, Fieldstar International, and BUSA to translate materials in language. These opportunities are available to Wyoming Suppliers at a cost per word rate. WOT is currently negotiation with RMI to have one set cost for any of the languages available.

Going forward, the technical assistance program offered through WOT will be available for price matching at some level of a cost match on the translation of promotional materials. This would include websites, signage, and a multitude of other marketing tools. The process will be similar to that of the sign grants where the partner will need to submit the cost of the project, time frame, and a brief breakdown on why the project is needed.

Hints to Actively Marketing Internationally:

Quick Tips:

When entering the international marketplace, there are several things to consider and prepare for. Here's our quick reference of Dos and Don'ts.

Things to Do

Define Your Objectives. What exactly is it you expect to achieve? Publicity? Trade contacts? Inclusion in Tour Operator catalogs? Special interest travel? Business and convention visitors?

Analyze Your Tourism Product. How accessible is your destination? What airline services are available? Do you offer a shuttle service from the airport? What is the capacity of your accommodations industry? Rental cars? Commercial or public attractions? Scenic places? Historical landmarks? Sports and Entertainment? Climate? Culture and Folklore? Special Events? And most important: Would someone really travel 5,000 miles to see it or experience it?

Identify Your Main Selling Points. Why should an international visitor come to your destination or deal with your company? What makes you unique? Quality of services? Language resources? Prices? Destination expertise? Uncrowded? Lively? Great shopping?

Establish Your Rates. This is becoming the weakest link in the region, evident by the fact that Tour Operators are hungry for our kind of products and want to include them in their brochures. But if your product is priced either "rack rate" or with a simple 10% travel agent rate, the Tour Operator will have absolutely no financial incentive to use up valuable brochure space to promote your product for free.

Target Your Markets. Use State and RMI research data. Analyze prevailing patterns of tourism, both domestic and international. Decide on the method of segmentation. By country? By market segment? Or in combination? Many don't realize that the single biggest market in the world is not Japan, or Taiwan, or Korea. It's the European Community.

Ask and Listen. Ask the Tour Operator and overseas rep whether they think there is a demand for your product. Listen to what they say about the market and how you might promote your product. Don't do all the talking during your appointment. Ask what the Tour Operator needs.

Things to Avoid

Don't Enter Foreign Markets Without A Long-Term Commitment. Tour wholesalers and operators need time to develop new products and introduce them to their clients. And they need to know that you are someone who will be there next year.

Don't Be Adamant About What You Consider Your Best Feature To Be. The view from Frankfurt and London is different from the view from the sagebrush. What may be popular domestically may be a complete bust in foreign markets. Sometimes what you don't have, like a large population base and

resort amenities, can work in your favor. Sometimes western history doesn't excite someone who lives in a 250 year old house and is used to seeing historical buildings that are over 800 years old.

Don't Push A Product That Won't Sell. Trust the Tour Operator and wholesaler to know his clients. You are both in it together, and nobody makes any money on something that doesn't get sold. Be prepared to accept alternative suggestions, but don't compromise your product or your integrity.

Don't Panic If Nothing Happens In The First Two Years. Any new product has its introductory phase. That is when it needs support and patience. Plan for the long haul. Remember that it might take a year to interest a Tour Operator in your product. When he/she agrees to sell it, it will still take a year to market it in a brochure properly. And if the product is purchased by a consumer, it is likely to be six to eight months before they take the trip! Be patient.

*Rocky Mountain International – www.rmi-realamerica.com

Suggested Levels of Entry:

Level 1 (Initial Steps): Cost \$0.00 to \$100.00

- Choose the top international markets that interest you, based on visitation of clients to your attraction/hotel/community/surrounding area.
Cost: \$0.00
- Contact your local CVB or Chamber to inquire about partnerships offered to reach international clients
Cost: \$0.00
- Contact the Wyoming Office of Tourism to update them about your product and to express your interest in working with the international markets.
Cost: \$0.00
- Register for a business listing on the WOT website, which will carry over into the Official Travelers Journal. If you represent an event, please verify that you are listed on the state's calendar of events.
Cost: \$0.00
- Build basic sample itineraries from one day to multiple days to use as a marketing tool to attract tour operators. Partner with local/state attractions, hotels, restaurants and other WY suppliers to help enrich your itineraries and to give tour operators a stronger example of why they need to book your product. Be sure to keep the itineraries as unique as possible and with your target audience in mind.
Cost: \$0.00
- Compile a one page informational sheet on your product, possibly including itinerary. Hotel recommendation: please use space for exclusive property amenities and local attractions rather than focusing on common hotel amenities. Example: promoting close proximity to an attraction rather than featuring a picture of a bed.
Cost: \$50.00
- Conduct follow up contact from the Wyoming Office of Tourism's appointments that are applicable to your business or area. All of the leads gathered from the tradeshow and sales missions that WOT attends are entered into a leads system on-line. By using your business login, all WY suppliers have access to these leads free of charge. *WOT is currently in the process of updating the leads online system and it will be back available shortly.
Cost: \$50.00 (if mailing hard copy materials, email follow up \$0.00)

- Learn trends of international markets by doing on-line research. This can include meal type preferences, attractions of interest, basic salutations, etc.
Cost: \$0.00
- Determine your optimum commission rates that can be offered to receptive operators, tour operators, travel agents when you are ready to move forward in the markets.
Cost: \$0.00
- Contact local receptive operators with an introduction to your product via email/phone call/one page promotional sheet (listed above).
Cost: \$0.00
- Dedicate time to track the international visitation to your business and to complete follow up with inquires as needed.

Level 2 (Tradeshaw Participation) Cost \$550.00 to \$5700.00

- Host trade and/or media familiarization tour to provide potential clients a firsthand view of how their guests will experience your product.
Cost: \$0.00 (cost of hotel room, meal, or admission as a marketing expenditure)
- Dedicate time or assign someone to attend tradeshows and complete follow-up throughout the year.
Cost: \$TBD
- Translate materials for tradeshaw use and/or fulfillment of information requests. For newcomers to the international markets, there is no need to go overboard on translations. A one page sheet or introduction paragraph to accompany your English brochure should be plenty to start with. Please look for assistance with translations if you are not fluent in the language you are trying to write. Stay away from using online translation sites as most are incorrect.
Cost: \$100.00 per language
- Rocky Mountain International Roundup (Cody, WY May 3 - 7, 2016) Rocky Mountain International (RMI) coordinates the international tourism activities for the Wyoming Office of Tourism. By using a regional marketing approach with Montana, North Dakota, and South Dakota, RMI reaches Europe, the Nordic Region, Australia and New Zealand. The Rocky Mountain International Roundup provides an opportunity for businesses, destinations and attractions within the region to meet face-to-face with vetted tour operators from the targeted markets who specifically want to do business in the region. It is a low-cost and highly efficient

way for local suppliers to meet with international tour operators and a small number of US-based receptive operators.

The Roundup is designed not only for suppliers who are currently operating internationally, but also for those who want to test the waters at a cost-effective price in an environment where they'll get the opportunity to promote their product and do business one-on-one.

The Roundup concept has been extremely well received by both buyers and suppliers. Most participants have indicated that they would attend again. Real business is generated at each Roundup site – room nights are booked, packages are included in foreign tour brochures, and deals are negotiated.

Cost: \$550.00

- North American Journeys - RTO Summit (Marina Del Rey, California February 2016) Formerly known as the NAJ Summits, NAJ's renamed RTO Summit is one of a series of three boutique networking marketplaces at which destinations and suppliers meet with RTOs (receptive tour operators) in 10-minute appointment sessions in order to grow their international business in an intimate environment where attendance is limited and personal service is offered. Each RTO Summit program opens with updates on important trends, followed by education sessions and panel discussion in which leading RTOs provide insights about their business and the challenges they face. It's the most efficient way to meet receptive tour operators, who, in 2013, will sell an estimated 16.4 percent of the 120 million room nights that will be sold to overseas leisure visitors to North America.

Cost: \$1500.00

- Go West Summit (Anchorage, Alaska February 22-25, 2016) Go West's successful event formula and comprehensive, well-rounded program are designed to provide you with every available opportunity to negotiate business contracts, establish relationships, and gain a better understanding about a variety of topics relevant to the tourism industry. Suppliers representing destinations, properties and attractions from the American West and international tour operators participate in multi-day networking sessions, familiarization trips and Adventure Day activities with the goal of showcasing the destination for future tourism business. The show's effective and easy to use, custom-designed computer software ensures a successful meeting experience. By matching tour operators from around the globe with Western U.S.-based suppliers in a one-on-one, business-friendly environment, Go West Summit is an event where exciting, profitable and lasting relationships are born. Go West combines the conveniences of a large event with the intimacy of a smaller event, and we pride ourselves on our low supplier to tour operator ratio. We are confident that you will find great value in attending the show and invite you to take part in the premiere tourism event of the American West – Go West Summit. Only suppliers from the states of Alaska, Arizona, California, Colorado, Idaho, Montana, Nevada, New Mexico, Oregon, South Dakota, Texas, Utah, Washington, Western Canada and Wyoming are invited to attend Go West Summit.

Cost: \$2000.00

- NAI -Active America-China Travel Summit (TBD) China is the fastest growing inbound tourism market to North America and Active America China, now in its sixth year, is the only show in North America 100% dedicated to building inbound Chinese tourism. Tour operators who attended Active America China were from companies that were responsible for over 40% of all tourism to North America.
 - Includes presentations about the current state of the Chinese inbound market
 - Clarifies how the Chinese outbound tourism market works
 - Presents best-practice tips on marketing to Chinese travelers
 - Provides complimentary interpreters for all one-on-one marketplace meetings

Cost: \$1500.00

Level 3 (Advertising) (Varying Costs)

- Print listing in RMI Real America Guide - The latest edition of the Real America Guide, the region's magazine style publication distributed in our overseas markets, is published every fall by Phoenix International Publishing. The travel information from the region is produced in four separate language editions of the guide (English, German, French and Italian). The Real America Guides reach European travel trade professionals and consumers through RMI's five European offices (UK, France, Germany, Italy, and the Netherlands) at trade and consumer shows, direct requests and through each market's expanded websites.
- Brand USA's Inspirational Guide- Wyoming Office of Tourism's annual buy in the BUSA inspirational guide opens up a discounted advertising opportunity for Wyoming communities (space is limited). Attract visitors from the most valuable international markets through the Discover America Inspiration Guide. With an impressive print and digital distribution strategy that includes targeted consumer, trade and embassy channels, it a great opportunity to inspire active travel planners across the globe to learn more about your destination. Distribution includes 575,000 print guides and 30 million digital banner impressions

Cost: \$3900.00

Cost: \$6000.00

- Discoveramerica.com (including in language videos) Promote your community internationally by taking advantage of Brand USA's marketing tool www.discoveramerica.com. The website allows communities to promote its attractions, hotels, and restaurants through photos, write ups, journalist's experience stories, and videos. By hosting media and purchasing additional content, communities can expand their website presence. To find out more about the in language videos, please visit:

http://marketing.milespartnership.com/thebrandusa/pdfs/In_LanguageContent_4page_0529.pdf

Cost: \$7000.00 per video

- Additional advertising opportunities: There are countless numbers of publications, websites, and newspapers that are available for your business to advertise in. Before placing an ad in something you are unsure of, please consult the Wyoming Office of Tourism. WOT will work with the overseas offices to verify the publications credentials to try and ensure you are getting the exposure you are looking for.
Cost: TBD

Level 4 (Advanced) (Varying Costs)

- Translate your entire website and a full promotional piece into the preferred market's language. By having translated materials available for your potential clients, you are going a step beyond the norm. This will allow them to read the materials with ease while also showing them that you are very serious about working in their country.
Cost: Varying \$ Per Word (depending on the language)
- Additional Brand USA Marketing Opportunities – Along with the opportunities listed above, Brand USA offers numerous opportunities to reach upwards of 17 countries. Wyoming Office of Tourism is exploring new programs monthly, and also exploring partnership opportunities. Please contact WOT to find out about the current BUSA buys. If you are interested in learning more about the opportunities on your own, please visit: [www. thebrandusa.com](http://www.thebrandusa.com)
Cost: Varying Costs Per Opportunity
- West Coast Sales Mission L.A. (Market: Japan) Businesses focused on reaching the Japanese market should consider doing the short sales mission to California with the Wyoming Office of Tourism's Japanese marketing firm, Fieldstar International. The sales event focuses on presenting to Japanese focused tour operators and Japanese focused receptive operators based in the Los Angeles area. Fieldstar International builds out an in language presentation that is given to the buyers followed by time for one on one discussions with the participants.
Cost: \$400.00
- IPW (New Orleans, 2016) – U.S. Travel Association's IPW is the travel industry's premier international marketplace and the largest generator of travel to the U.S. IPW is NOT a typical trade show. In just three days of intensive pre-scheduled business appointments, more than 1,000 U.S. travel organizations from every region of the USA (representing all industry category components), and more than 1,300 international and domestic buyers from more than 70 countries conduct business negotiations that result in the generation of more than \$4.7 billion in future Visit USA travel. At IPW, buyers and sellers are able to conduct business that would otherwise be generated only through an exhaustive number of around-the-world trips. Due to the intense number of appointments and strategic focus, it is recommended that suppliers attend multiple tradeshow and build connections before attending IPW.

Cost: \$3200.00 (registration cost with WOT co-op)

- JATA(Japanese Association of Travel Agents) (Tokyo, Japan September 24-27 2015) Japan is the largest Asian market and second-largest overseas market generating visitors to the United States. Japan is forecast to increase by 1% each year to produce total growth of 190,000 additional travelers to the U.S. by the end of 2018. With the non-stop flight between Tokyo-Narita and Denver showing huge success going into its second year, getting to Wyoming is easier than ever.

As the ideal forum for showcasing destinations, JATA Tourism Expo Japan provides abundant opportunities for Destination Marketing Organizations (DMO's) to exchange travel information and conduct effective business meetings, while inspiring travel professionals and consumers through the power of travel. The tradeshow allows for attendees to interact with the event's 150,000 attendees. There is both a trade side and a consumer component to the show, making it a fantastic opportunity to reach the Japanese market.

Cost: \$4000.00

- Partner with Rocky Mountain International (DMO) Become an official partner with RMI giving you benefits of a side-panel-banner ad with two rotating positions visible on every page of www.rmi-realamerica.com; registration at the RMI Roundup; quarterly newsletter additions; monthly overseas reports from all six international RMI offices; partnership listing on trade website, online access to RMI's proprietary and exclusive online databases (including TRIP Reports and the international database of tour operator and media contacts and leads), designation at the annual Summit Meeting, invited to participate in international tradeshows (Exhibitor fees, travel and meal expenses are excluded), partnership listing in all official RMI publications, opportunity to be featured in all promotional updates to RMI's in-market representatives, and invited to participate in the annual "Summit Meeting."

Cost: \$4000.00

- ITB (Berlin, Germany March 9-13 2016) As a driving force in the travel industry, ITB Berlin gives important impulses to a continuously growing market. Exhibitor sales of about 10 billion dollars and an exhibitor satisfaction rate of 92 percent are evidence enough that supply and demand meet at the right place. With more than 174,000 visitors, among these 114,000 trade visitors, and 11,000 represented companies from 189 countries ITB Berlin is the leading B2B-Platform of all tourism industry offers. In addition, the world's largest tourism convention ITB provides unique opportunities to benefit from the leading think tank of the global tourism industry. All levels of the value added chain are present: Tour operators, booking engines, destinations, airlines, and hotels right through to car rental companies.

Despite its size, ITB is clearly structured. ITB enjoys worldwide media recognition and offers comprehensive support for all marketing questions exhibitors might have.

Official RMI partners are invited to join under the "Real America" umbrella on the show floor.

Cost: \$TBD

- World Travel Market (WTM) (London, England November 2-5, 2015) Staged annually in London, World Travel Market - the leading global event for the travel industry - is a vibrant must attend four-day business-to-business event presenting a diverse range of destinations and industry sectors to UK and International travel professionals. It is a unique opportunity for the whole global travel trade to meet, network, negotiate and conduct business. By attending World Travel Market, participants efficiently, effectively and productively gain immediate competitive advantage for their business and stay abreast with the latest developments in the travel industry.

Official RMI partners are invited to join under the “Real America” umbrella on the show floor.

Cost: \$TBD

*All costs are estimates based on 2014 pricing and are subject to change at any time.