



2019 Advertising Effectiveness & ROI

OCTOBER 2019



Executive Summary

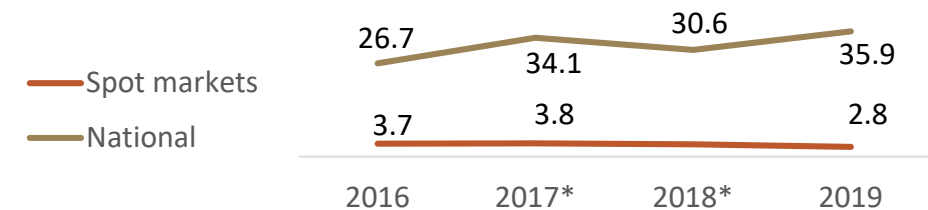
WOT's campaign influenced 3.2% more trips in 2019 than the previous year, indicating that 1.29 million trips to Wyoming would not have happened without the investment in tourism.

The 2019 ROI increased 19% to \$343, a new high for WOT and well above the average DMO ROI of \$268. WOT's 2019 campaign also generated over \$64 million in tax revenues.

Nearly 39 million households are aware of the campaign, much of this growth comes from focusing on a more national marketing strategy.

Campaign impact	2018	2019	% change
Total influenced trips	1.25 M	1.29 M	3.4%
Influenced visitor spending	\$1.48 B	\$1.61 B	8.4%
Expenditures	\$5.14 M	\$4.69 M	-8.8%
ROI	\$289	\$343	18.7%
Taxes generated	\$59.33 M	\$64.33 M	8.4%
Tax ROI	\$11.54	\$13.73	19.0%

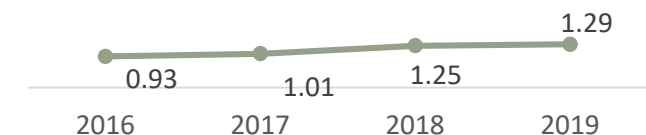
Households aware of WOT ad campaign
(in millions)



The 2019 paid advertising campaign generated \$1.6 billion in visitor spending to the state and an additional 1.29 million visitors.

WOT's 2019 campaign generated 1.29 million Wyoming visits, 3% more trips this year than last.

Wyoming visits influenced by the
WOT campaign
(in millions)



Background

The Wyoming Office of Tourism (WOT) markets the state as a leisure destination in order to generate visitor spending that benefits local communities. To measure the effectiveness of these efforts, WOT has partnered with Strategic Marketing & Research Insights (SMARInsights) since 2007 to conduct an annual measure of paid advertising reach, impact, and ROI.

The state's *That's WY* campaign has been a strong performer, and for several years WOT has targeted a number of spot markets with additional ad spending nationally. The current campaign also has a spot market and national component, and the creative has been refreshed to focus on five pillars relating to the overall media strategy.

The specific objectives of this tracking research are to:

- Measure the reach of the advertising;
- Evaluate the effectiveness of the marketing through SMARInsights' cost-per-aware household benchmarking;
- Understand the overlap and potential impact of multiple media;
- Determine the ability of the creative to communicate desired messages, again using SMARInsights' benchmarking;
- Assess the ability of the advertising to improve the image of the state, motivate interest in visiting, and increase visitation;
- Calculate the number of influenced trips, visitor spending, and return on investment of the media campaigns; and
- Forward insights into future refinement of the marketing.

Methodology

- SMARInsights conducted 3,289 surveys with leisure travelers in the markets shown here in October 2019. In order to qualify for the survey, respondents had to be travel decision makers who regularly take overnight leisure trips of at least 50 miles from home.
- The advertising effectiveness methodology requires respondents to view WOT's ads in order to gauge awareness, so we developed and programmed an online survey. National sample vendors provided a survey link to potential respondents.
- WOT placed media in target markets but also had RFI TV, digital, and print components that could reach a national audience. Quotas were established in the spot markets with the largest media buys, including Chicago, Seattle, Portland, and Minneapolis. Kansas City was a spot market in 2018, but that population is included as part of the national audience in this research. Targeted radio was aimed only at Salt Lake City and Denver, which are also part of the national audience.
- Upon completion of data collection, the results were cleaned, coded and weighted to be representative of the population.
- The following report summarizes the results of the survey. For readability, numbers throughout the report have been rounded. Thus straight calculations do not reflect the totals. The questionnaire and the ads tested appear in the Appendix to this report. Overall results are presented at +/- 1.71%.

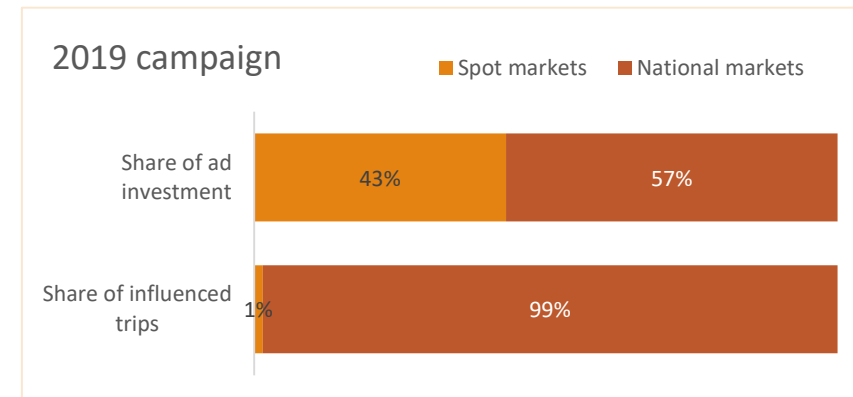
Market	Surveys
Chicago	598
Seattle	537
Portland	544
Minneapolis	529
National	1,081
Total	3,289

Insights

- With a 9% lower ad investment this year compared to 2018, WOT generated 3% more visits to the state and 8% more visitor spending.
- **The 2019 paid advertising campaign generated \$1.6 billion in visitor spending to the state and a strong increase in ROI and tax ROI.**
- This positive result is attributable to strong performance in the national markets, where much of the ad investment shifted to TV from digital. This shift to a broader-reach medium works together with the high interest among national markets in Wyoming's unique leisure product.
- A continuation of the shift in focus from spot markets to a national effort is likely to generate further positive results. In the current campaign, 43% of media investment was aimed at the spot markets, which produced only 1% of the influenced Wyoming trips. The national markets represent a significant opportunity for WOT.

	WOT 2018	WOT 2019	SMARInsights benchmark
Awareness	36%	41% ✓	37%
Cost per aware HH	\$0.15	\$0.12 ✓	\$0.39
ROI	\$289	\$343 ✓	\$268
Tax ROI	\$11.54	\$13.73 ✓	\$11.96

Benchmarks are based on state leisure travel campaigns except in the case of awareness, where the expected awareness shown here is based on a model of other DMO campaign data (ad spending, population size, creative rating)



Insights

- The ads are very strong at communicating desired messaging. In fact, while the figures shown at right indicate the top 25% of ratings, WOT's 2019 creative rates in the *top 10%* for communicating Wyoming's vast landscapes full of endless natural beauty, that it is a place to disconnect from the hectic pace of daily life, escape to the comfort of the wide open spaces, and seek adventure.
- The 2019 ads represent an improvement over 2018 in their ratings for making consumers want to visit Wyoming and want to learn more about what there is to see and do in the state. However, these ratings remain below the benchmark among general population travelers.

Top 25% of ads tested	WOT 2018	WOT 2019	SMARInsights benchmark
Communication ratings	4.0	4.2 ✓	4.0
Impact rating: these ads make me want to visit Wyoming	3.6	3.8	3.9
Impact rating: these ads make me want to learn more about things to see and do in Wyoming	3.6	3.7	3.9

Benchmarks indicate the top 25% of DMO ads SMARInsights has tested in 2017 through 2019.

Campaign spending

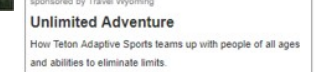
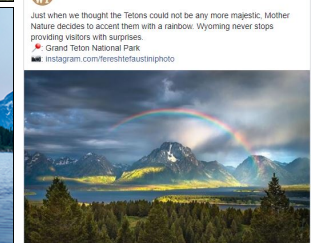
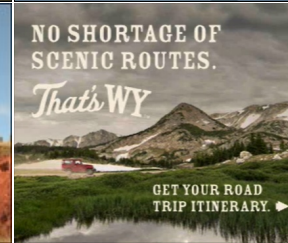
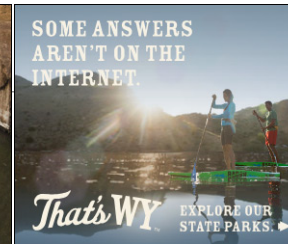
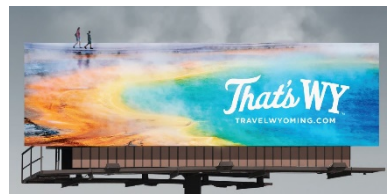
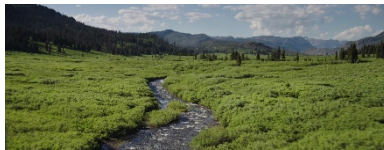
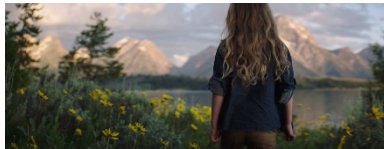
- WOT invested \$4.6 million in its 2019 paid advertising, 9% less than in 2018.
- Investment increased in Chicago and Minneapolis, and decreased in Seattle, Portland, and nationally.
- The 2019 TV investment is two-thirds higher than last year.
- There was also a spending increase in digital, while investment in print, outdoor, and radio decreased.
- TV includes Travel Channel in national, spot by market and connected TV in all geo-targeted markets (Chicago heavy-up in CTV).
- Digital includes display, paid search and paid social. Digital spend was divided evenly between the geo-targeted geographies. National digital reflects Travel Channel.
- Print: National
- OOH: Placed by market
- Radio: Placed by market in Denver and Salt Lake City, which did not have sufficient sample size to test individually.
- Does not include Madden co-op media.

	2016	2017	2018	2019	% Change
Chicago	\$507,285	\$441,918	\$620,943	\$644,127	4%
Seattle	\$645,173	\$580,606	\$602,586	\$584,544	-3%
Portland	\$476,675	\$439,640	\$321,562	\$293,507	-9%
Minneapolis	\$436,959	\$445,702	\$479,473	\$502,244	5%
National	\$2,309,364	\$2,171,136	\$2,802,988	\$2,661,654	-5%

	2016	2017	2018	2019	% Change
TV	\$986,556	\$1,280,092	\$729,573	\$1,220,406	67%
Digital	\$1,438,651	\$1,670,665	\$2,246,521	\$2,459,549	9%
Print	\$1,013,048	\$666,660	\$1,165,490	\$459,037	-61%
Outdoor	\$752,662	\$781,920	\$609,290	\$305,000	-50%
Radio	\$184,540	\$0	\$388,892	\$242,084	-38%
Total	\$4,375,457	\$4,399,337	\$5,139,765	\$4,686,076	-9%

Creative tested

- Ads ran March-September
- New TV spots introduced this year



Competitive position

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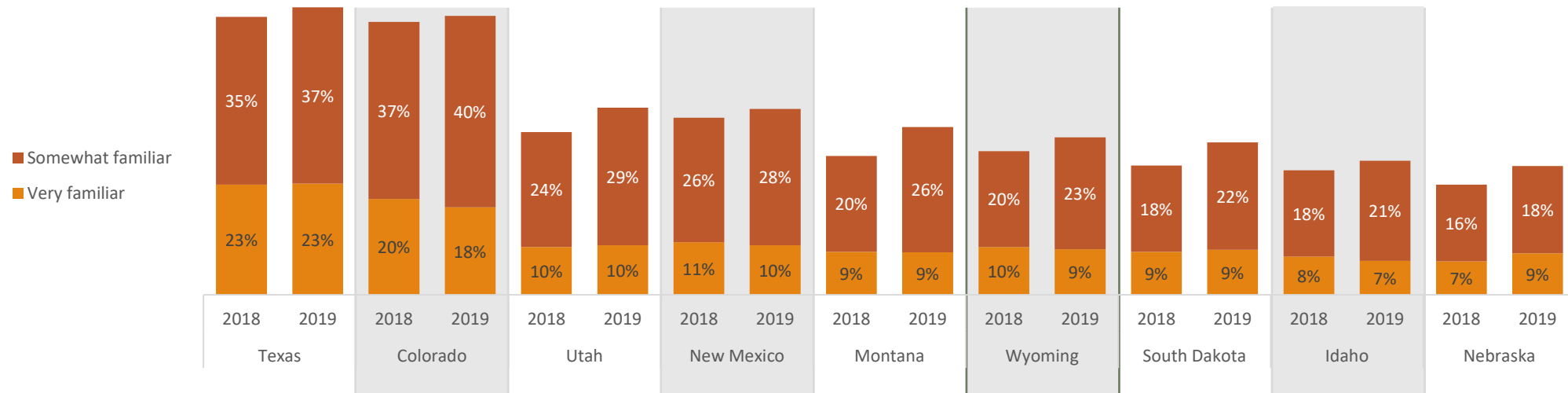
Destination familiarity

About a third of traveling households have some level of familiarity with what Wyoming has to offer as a place for a leisure trip.

Familiarity with Wyoming and other destinations in the competitive set remain fairly consistent year over year.

Texas and Colorado lead in traveler familiarity, while Wyoming is part of a second tier with Utah, New Mexico, Montana, and South Dakota.

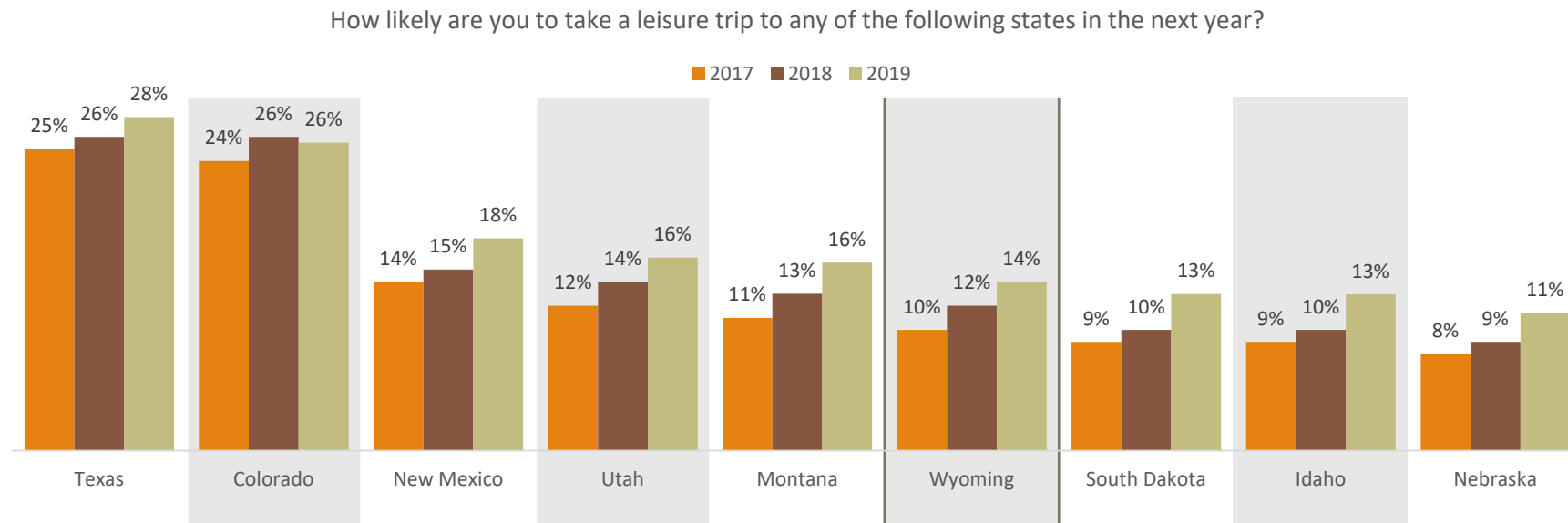
How familiar are you with each of the following states, in terms of what they have to offer as a place for a leisure trip?



Competitive position

Likelihood to visit Wyoming is generally on an up-swing. Compared to last year, there is higher or similar likelihood to visit all the states shown.

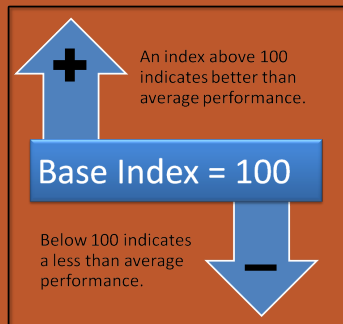
Visit intent typically follows familiarity, and the states with higher familiarity also have higher visit intent. This is true here as well, with Wyoming remaining in line with Utah, Montana, South Dakota, and Idaho.



Competitive image

On image ratings, Wyoming continues to index high for its Old West and cowboy culture (alongside Montana and Texas).

Consumers remain clear on Wyoming being home to most of Yellowstone and are aware that it spreads into Montana and Idaho as well.



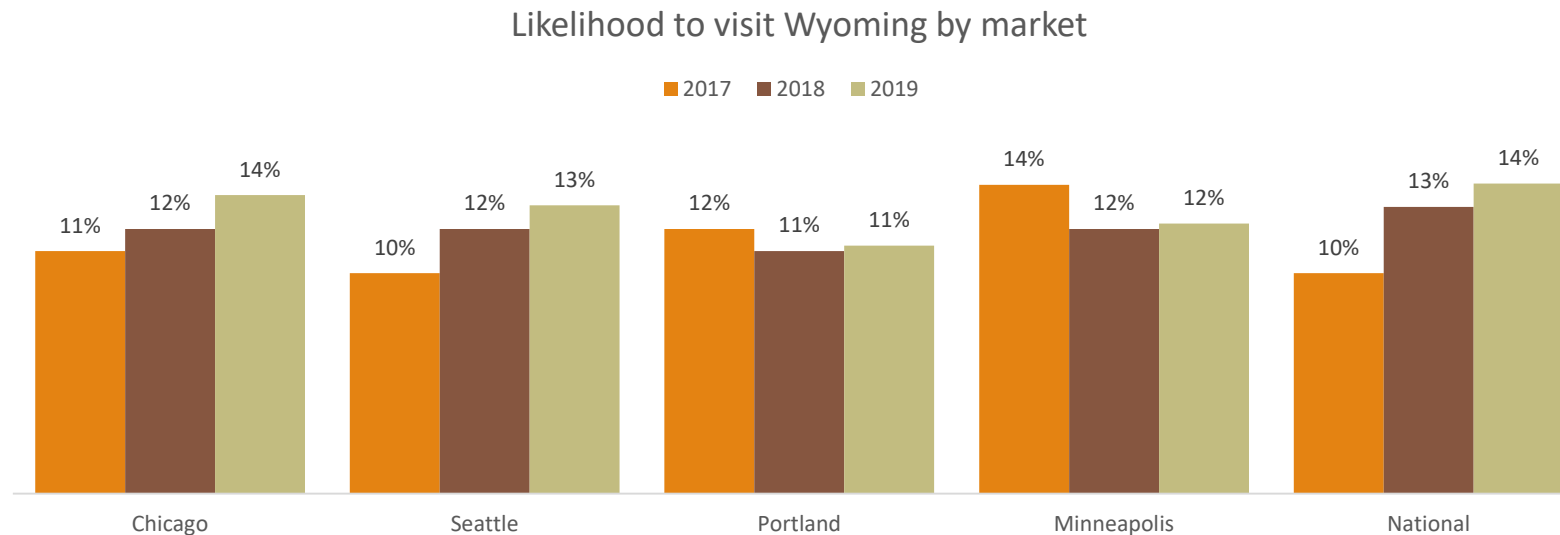
Index to average rating	Wyoming	Colorado	Idaho	Montana	New Mexico	South Dakota	Texas	Utah	Nebraska
Is home to Yellowstone National Park	148	94	104	134	78	89	72	91	89
Is where the Old West lives on	112	91	95	113	100	99	109	94	87
Is a place to experience cowboy culture	111	90	93	111	96	100	117	92	90
Has exceptional wildlife viewing	111	106	100	109	92	102	95	97	89
Is a place to discover American Indian culture	108	94	97	107	108	109	93	93	92
Offers great camping and RVing options	106	103	96	105	96	103	98	101	91
Has wide-open roads to explore	105	100	96	105	98	102	103	98	92
Has diverse natural landscapes and scenery	105	106	98	104	103	102	97	101	84
Offers abundant outdoor recreation options	105	106	99	104	98	99	99	100	89
Is where I can find adventure	104	106	96	105	99	101	102	99	88
Is a good place for a road trip	104	104	95	105	99	102	101	101	90
Has interesting historical sites and museums	104	100	93	103	101	104	106	98	90
Is a good value for the money	103	98	97	101	101	101	102	99	97
Travel is safe and accessible	103	102	98	103	97	100	102	97	98
Is a place to have new experiences	103	105	97	102	100	101	104	99	90
Is a good place for family vacations	103	106	95	104	100	103	102	98	90
Is welcoming to all people	102	106	98	104	99	102	98	96	95
Is great for a winter destination	100	116	95	105	100	87	102	106	89
Has modern, upscale hospitality options	99	107	95	99	98	98	108	100	96
Is a good year-round destination	99	110	95	101	104	91	110	102	89
Provides a variety of dining choices	98	105	97	98	99	97	112	98	94
Is an easy to get to destination	98	103	95	100	98	101	107	99	98

Market position

As we saw overall, likelihood to visit Wyoming is level with or slightly above last year's measures in the spot and national markets.

The size of the national markets means that the results here look very similar to the overall results, which is the case with visit intent.

The reason to focus ad messaging in spot markets is typically because these markets show greater potential to visit. However, in this instance, the national market visit intent is as high as any of the spot markets. This is unusual and why there is so much potential with national.



Marketing recall

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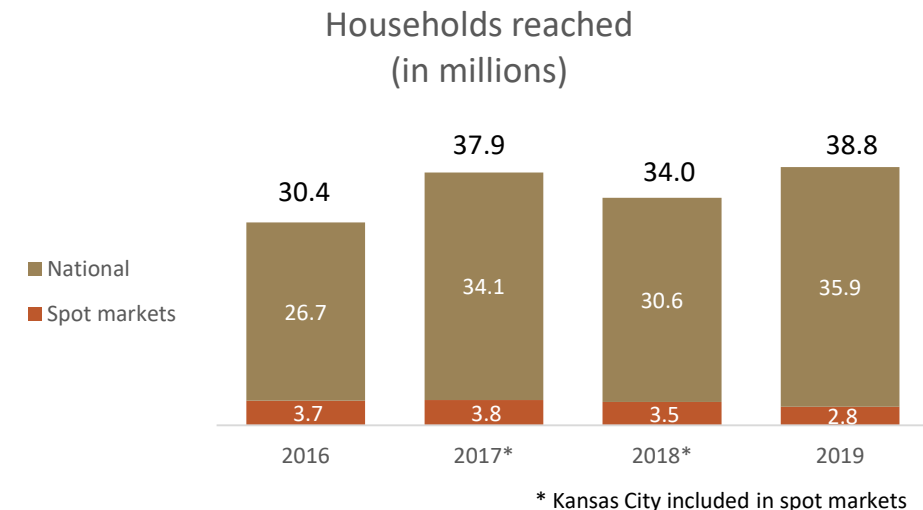
Overall ad recall

The success of the 2019 effort is largely the result of a more equal investment in television and digital media in the national markets.

Nearly 39 million households are aware of the campaign, which is the highest volume of ad-aware households of a WOT ad campaign to date.

A 9% decrease in advertising investment is associated with 14% more ad-aware households. This in turn generates a more efficient campaign; WOT paid just 12 cents to reach each ad-aware household with its 2019 messaging.

The increase in awareness is the result of a higher recall in the national markets. While overall spending in all markets decreased year to year, WOT shifted resources from digital to TV, which reaches the general population, growing recall on brand messaging from the national audience.

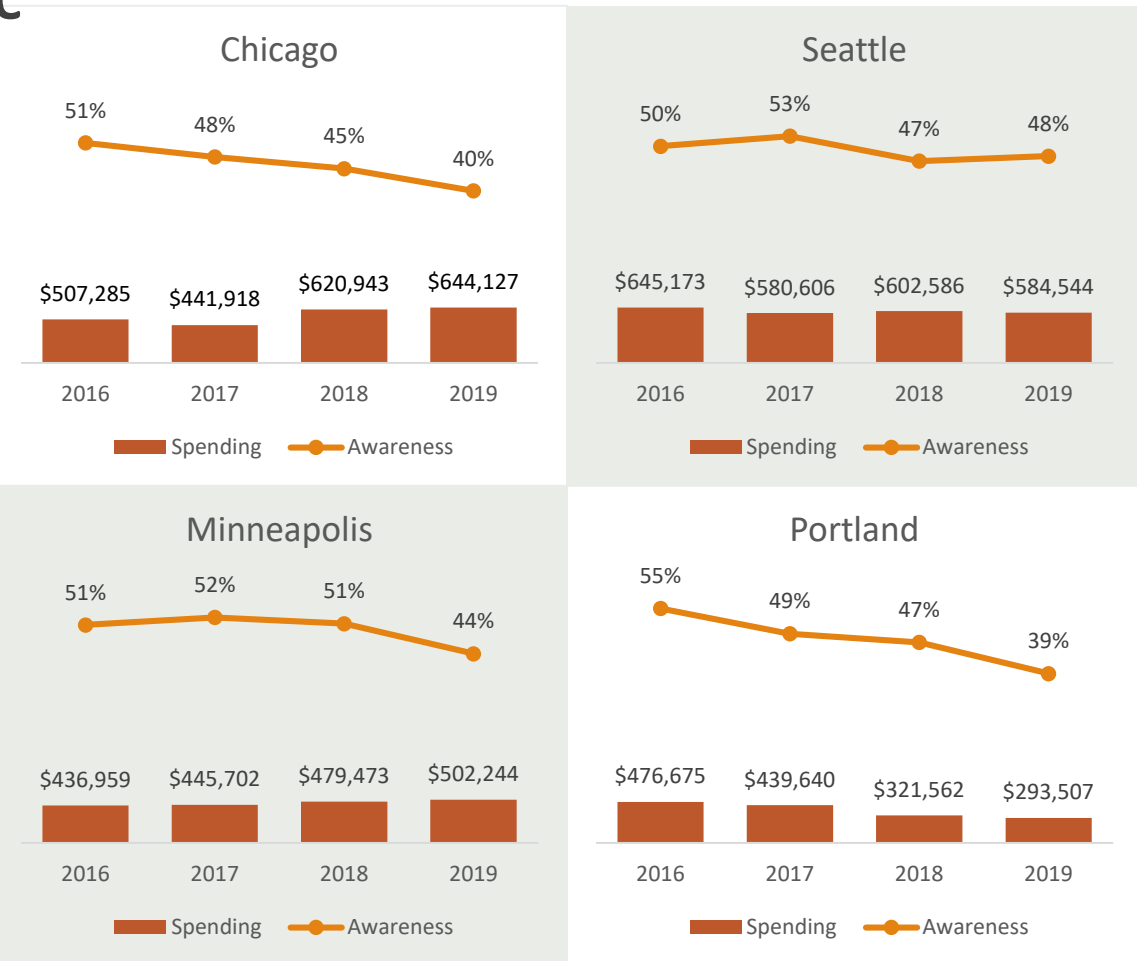


Cost per Aware HH	2016	2017	2018	2019
Awareness	30%	40%	36%	41%
Aware HHs	30,396,596	37,880,895	34,073,558	38,802,072
Media Spending	\$4,375,457	\$4,399,337	\$5,139,765	\$4,686,076
Cost per Aware HH	\$0.14	\$0.12	\$0.15	\$0.12

Ad recall by market

Looking at ad awareness by market, Chicago, Minneapolis, and Portland show an annual decline regardless of the level of spending, while recall has remained more level in Seattle.

Recall is up nationally, where the bulk of WOT's paid advertising was invested.



Ad recall by market

All four of the spot markets are less efficient than the average, which is 43 cents per aware household. This benchmark has become lower as destination marketing organizations have become savvier with their advertising investments. In prior research, SMARInsights has observed that Seattle and Portland are inconsistent performers, while Chicago and Minnesota tend to be somewhat stronger. Awareness is reasonable in each spot market, between 40% and 50%. But the comparatively small populations – relative to the national market – mean that these individual DMAs are expensive to reach.

The benchmark for a national leisure destination campaign is 30 cents to reach an aware household. WOT's 2019 campaign is far more efficient than average at just \$0.07. This is due to a consistent presence in the marketplace with a similar-looking and regularly refreshed campaign, backed by significant ad investment.

Since a national campaign will reach the spot markets, and since WOT has moved to using TV nationally, targeted spot market campaigns are not as impactful.

	Chicago	Seattle	Portland	Minneapolis	National	TOTAL
Targeted HH	2.9 M	1.5 M	949 K	1.4 M	88.4 M	95.2 M
Awareness	40%	48%	39%	44%	41%	41%
Aware HH	1.2 M	722 K	374 K	636 K	35.9 M	38.8 M
Media spending	\$644,127	\$584,544	\$293,507	\$502,244	\$2,661,654	\$4,686,076
CPAH	\$0.56	\$0.81	\$0.78	\$0.79	\$0.07	\$0.12



SMARInsights' 2019
cost per aware HH
benchmarks:
Spot markets – \$0.43
National – \$0.30

Ad recall by medium

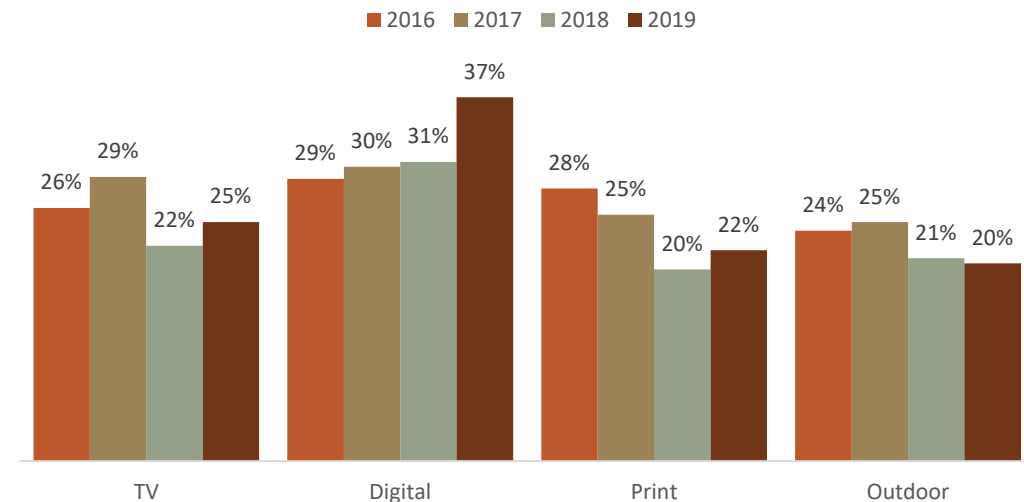
With significantly more invested in TV this year, WOT saw an increase in recall of this medium. While the 11% awareness lift is lower than the two-thirds increase in spending, it is still a successful outcome, since the executions were new.

Typically, with a new spot, we see a dip in awareness until the ads have time to wear in with consumers. In WOT's case, however, higher spending mediated the impact of new creative to generate a lift.

This is the second consecutive year of \$2M+ spending on digital – which includes banners, social, and native – and awareness is up considerably. While some executions were introduced this year, some were the same or similar to ads that ran in 2018, helping to build recall.

Print awareness remains at about a fifth of traveling households. While recall of print fell last year, this year it remained steady and with lower spending, this makes it WOT's most efficient medium.

	TV	Digital	Print	Outdoor
Aware HHs	23,377,402	35,561,800	20,622,026	888,843
Media Spending	\$1,220,406	\$2,459,549	\$459,037	\$305,000
2019 Cost per aware HH	\$0.05	\$0.07	\$0.02	\$0.34
2018 Cost per aware HH	\$0.03	\$0.08	\$0.06	\$0.50



Creative review

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Creative evaluation

A campaign must not only generate awareness, but it also needs to effectively communicate desired messages and generate interest in order to drive travel. This is the task of the creative executions.

We use two types of attributes to evaluate advertising creative:

- **Communication attributes** measure how well the ads communicate particular messages about the destination
- **Impact attributes** measure how well the ads encourage the consumer to take an action

Communication and impact ratings have different benchmarks because it is harder to generate an action from a consumer than it is to communicate a desired message.

After viewing all the ads in the survey, respondents rated the campaign on a 5-point scale where 5 = “strongly agree” and 1 = “strongly disagree.”

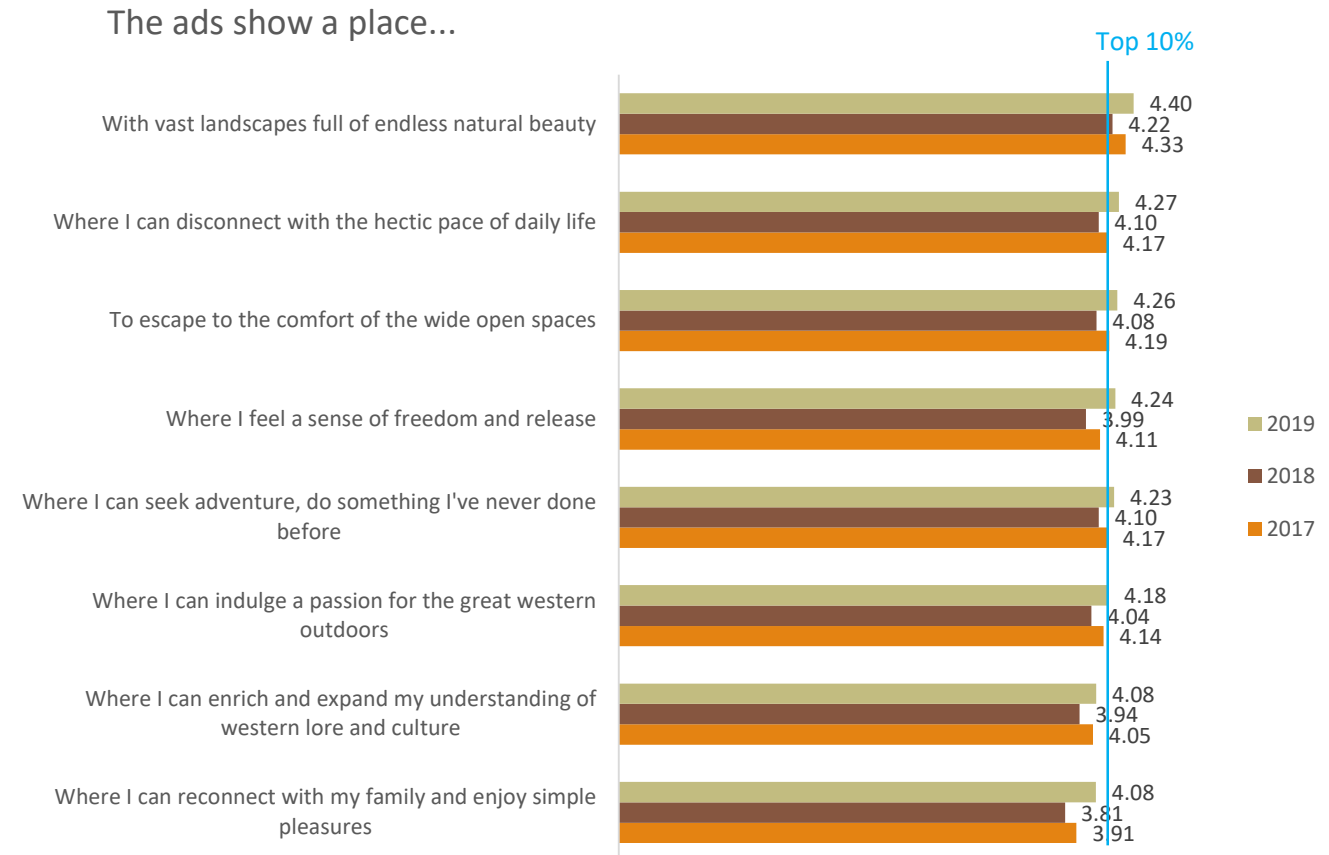
Through the evaluation of hundreds of destination marketing campaigns, SMARInsights has developed benchmarks for the creative. The goal for DMOs is to be in the top 25% of all campaigns evaluated. The benchmarks are noted in each of the creative rating charts that follow.

Creative evaluation – communication

With the addition of two new brand TV spots, WOT's communication ratings are even higher this year than in the past two years.

The benchmark rating for the top 25% of ads SMARInsights has tested is a 4.0, and ratings on all of attributes meet that threshold for the 2019 campaign.

In fact, the campaign is in the top 10% of ads for communicating the beauty of Wyoming's vast landscapes and that it is a place to disconnect, escape, sense freedom, and seek adventure.



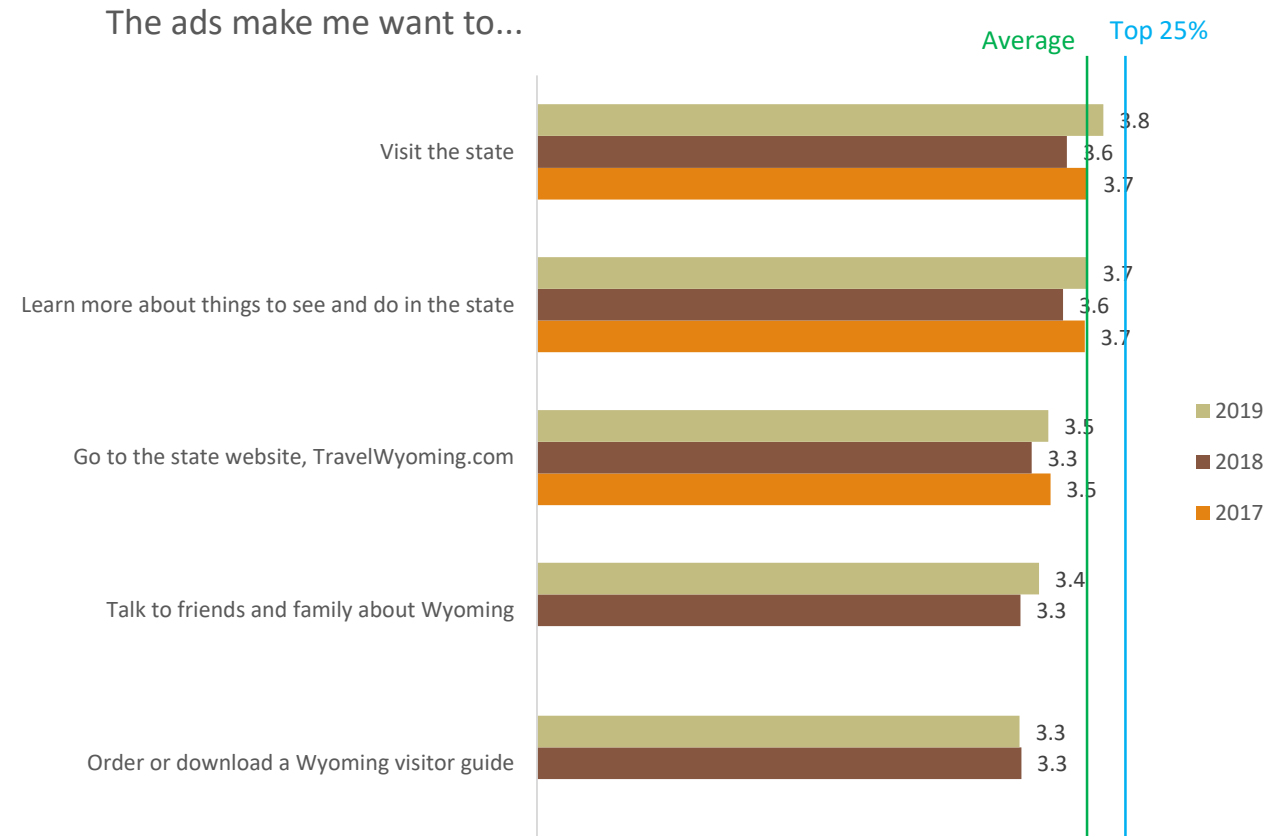
Creative evaluation – impact

This year's campaign receives higher ratings on all five impact attributes than last year's.

With similar creative to last year, the chief difference between 2018 and 2019 is the two new TV spots.

The new spots boost ratings to above average for generating interest in visiting Wyoming. The increases in ratings for this attribute and generating interest in learning more about what to see and do in the state can be attributed to the aspirational nature of the “Wild girl” and “Wild grandpa” spots.

Ratings for generating interest in other trip-directed activities – talking to friends/relatives about the state or downloading a visitor guide – are also above the 2018 ratings.

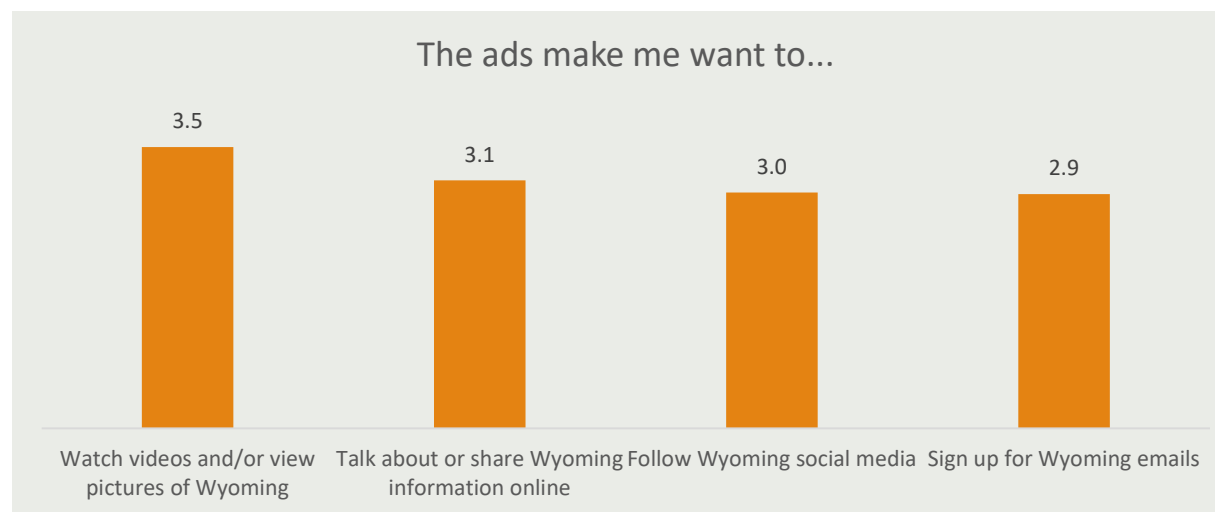


Creative evaluation – new attributes

Four new impact attributes were added this year to begin tracking the ads' impact on consumer engagement with the state's digital presence. The strongest performance is for the ads making travelers want to watch videos and view images of Wyoming, followed by engaging with Wyoming information online.

The remaining actions are likely to move among a subset of consumers. The ads cannot be expected to produce a social follow from consumers who are not on social media, for instance.

Because these are not attributes for which SMARInsights has benchmarks, we can track these measures to see how they move over time and compare them to this baseline.

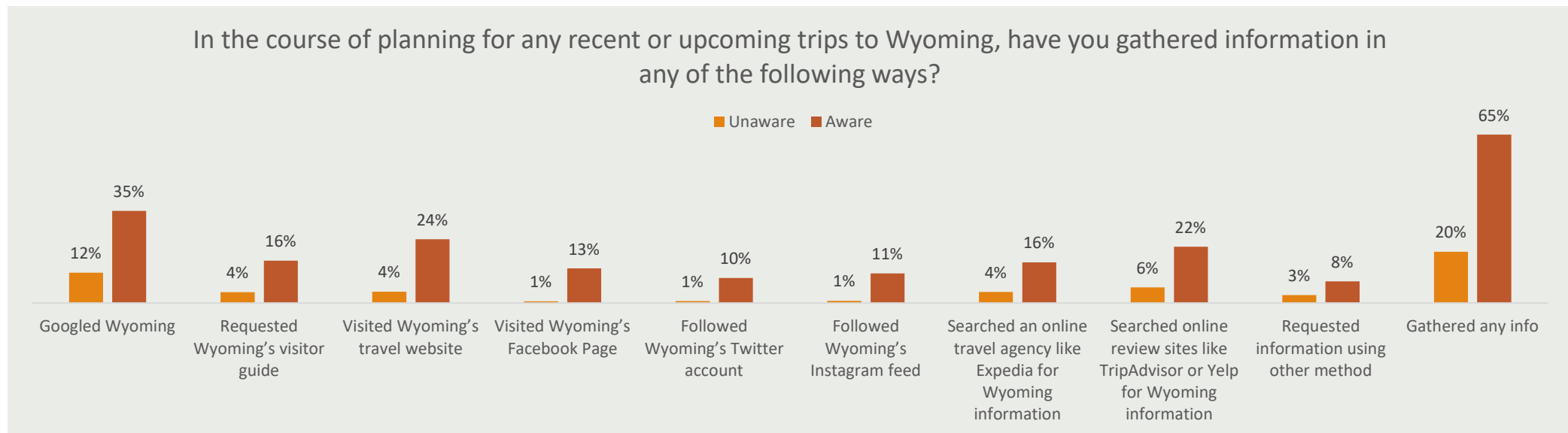


Impact of the advertising

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Impact on information gathering

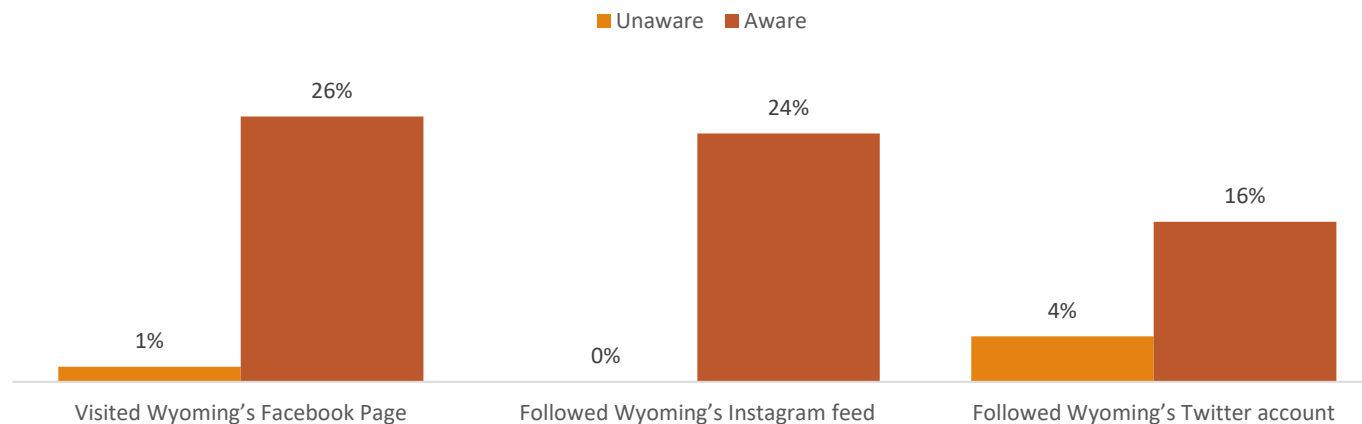
Ad-aware travelers gathered information on Wyoming at three times the rate of unaware travelers. Ad-aware travelers use all the channels shown below at a higher rate than those who do not recall WOT advertising.



Impact on social media follows

The interaction with WOT on social media shown here correlates with those who said the ads make them want to follow Wyoming on social media.

Ad impact on those who strongly agree that the ads make them want to follow Wyoming on social media



Impact on image

Even without the influence of the ads, travelers agree strongly (above 4.0 on a 5-point scale) that Wyoming has natural outdoor assets and a unique Western culture. The ads reinforce these views – agreement that the state offers exceptional wildlife viewing moves even higher among ad-aware travelers.

However, attributes where baseline (unaware) ratings indicate a lack of knowledge (in the range of 3.0 to 3.5), the ads have more opportunity to impact views of the state.

As in 2018, the *That's Why* campaign increases agreement that Wyoming is easy to get to. This isn't addressed directly in the advertising, but as we saw, aware travelers tend to research the state more. This halo effect is also where we see impacts on specific elements of a Wyoming experience – dining and lodging choices, as well as museums and attractions.

The attributes in bold are those that prior research has indicated are strongly correlated with visit interest. The ads positively impact agreement that all these attributes describe Wyoming.

Agreement that Wyoming...	Unaware	Aware	Lift
Is an easy to get to destination	3.3	3.6	11%
Provides a variety of dining choices	3.4	3.8	10%
Has interesting historical sites and museums	3.7	4.0	8%
Is great for a winter destination	3.3	3.6	8%
Is a good place for family vacations	3.8	4.0	7%
Is welcoming to all people	3.7	4.0	6%
Has modern, upscale hospitality options	3.5	3.7	6%
Is a good year-round destination	3.3	3.5	6%
Is a place to have new experiences	3.9	4.1	5%
Is a good place for a road trip	3.8	4.0	5%
Where I can find adventure	3.9	4.1	5%
Offers great camping and RVing options	3.9	4.0	4%
Is where the Old West lives on	3.7	3.8	4%
Is a good value for the money	3.7	3.8	4%
Is a place to discover American Indian culture	3.7	3.9	4%
Travel is safe and accessible	3.8	4.0	3%
Has exceptional wildlife viewing	4.1	4.2	2%
Offers abundant outdoor recreation options	4.0	4.1	2%
Is a place to experience cowboy culture	3.8	3.9	1%
Has wide-open roads to explore	4.0	4.1	1%
Has diverse natural landscapes and scenery	4.1	4.1	0%
Is home to Yellowstone National Park	4.1	4.1	0%

Impact on likelihood to visit Wyoming

As we saw earlier, various elements of WOT's marketing campaign work together to accomplish its goals. While brand (broadcast TV and print) and tactical (digital and OOH) ads each generate a similar lift on likelihood to visit Wyoming – shifting it from 7% among unaware households to 14% – the combination of brand and tactical ads generates twice the lift. Among travelers who recall both brand and tactical executions, 27% are likely to visit Wyoming in the coming year.

Similarly, paid ads and PR work together to generate an incremental boost in visit intent, with the combination of paid ad and PR exposure lifting likelihood to visit to one-third.



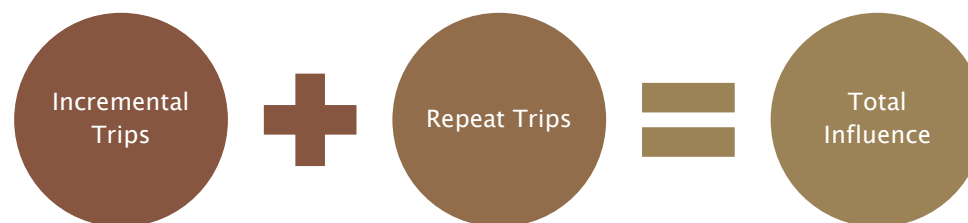
Measuring ad influence on travel

SMARInsights' methodology for measuring the impact of destination advertising relies on establishing a base rate of travel. Certainly, there would be travel to Wyoming even without any paid advertising. Thus not all visitation, or even visitation by aware households, is attributable to the ads. In this evaluation, the level of travel among unaware households is considered the base and what the state would see without the marketing campaign. Accordingly, any travel above that base by aware households is what is considered influenced. As such, this is a very conservative measure of influence.



But in addition to influencing a decision to visit, destination marketing can also motivate consumers to take more than one trip. Just as with incremental travel, repeat trips are considered incremental by comparing the number of trips by those aware of the advertising against those who are unaware.

Because of this, the influence is not limited to just the number of incremental trips the campaign is able to influence but also the number of repeat trips it is able to motivate.



Impact of advertising on travel

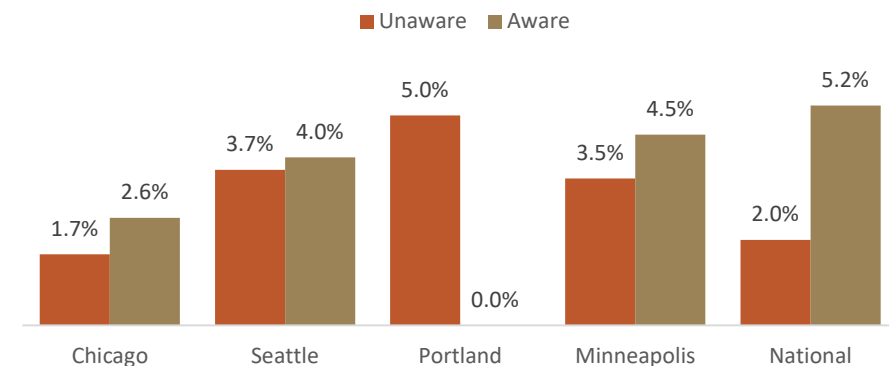
WOT's 2019 campaign generated 1.29 million Wyoming visits that would not have occurred without the advertising. These trips came from three of the four spot markets, with the bulk of the trips from the national market.

Even without WOT's advertising, travelers would visit Wyoming. The rate of travel that we could expect without advertising is captured in the unaware travel shown at right.

The additional share of travel – the difference between the levels of visitation among ad-aware and unaware households – is attributable to the campaign.

The travel increment is applied to the volume of ad-aware households to arrive at the number of trips influenced by the campaign.

Incremental travel by market



2019	Chicago	Seattle	Portland	Minneapolis	National
Aware HH	1,149,736	721,673	373,945	636,372	35,920,346
Travel increment	0.9%	0.3%	0	1.0%	3.2%
Trips	9,993	2,138	0	6,198	1,149,144

Impact on multiple trips

The ads spur visitation, and they can also spur repeat visitation – multiple Wyoming trips in a single year. We don't expect to see repeat visitation every year from all markets. And in fact, Seattle, Portland, and Minneapolis do not have a repeat increment.

For the second year in a row, Chicago generated a repeat travel increment – nearly 1,000 additional repeat visits from among ad-aware households.

With a 0.07 repeat increment, the national markets generated another 124,000 repeat Wyoming visits.

2019	Avg # trips among unaware	Avg # trips among aware	Additional trips by aware HH
Chicago	1.17	1.20	0.03
Seattle	1.00	1.00	0.00
Portland	1.09	1.00	0.00
Minneapolis	1.00	1.00	0.00
National	1.13	1.19	0.07

2019	Aware HH	Travel by aware	Aware traveling HH	Additional trips	Ad-influenced repeat trips
Chicago	1,149,736	2.6%	29,480	0.03	983
National	35,920,346	5.2%	1,881,404	0.07	124,715
Total	37,070,082	5.2%	1,910,884	0.07	125,698

Total influenced travel

WOT's 2019 campaign generated 1.29 million Wyoming visits, 3% more trips this year than last.

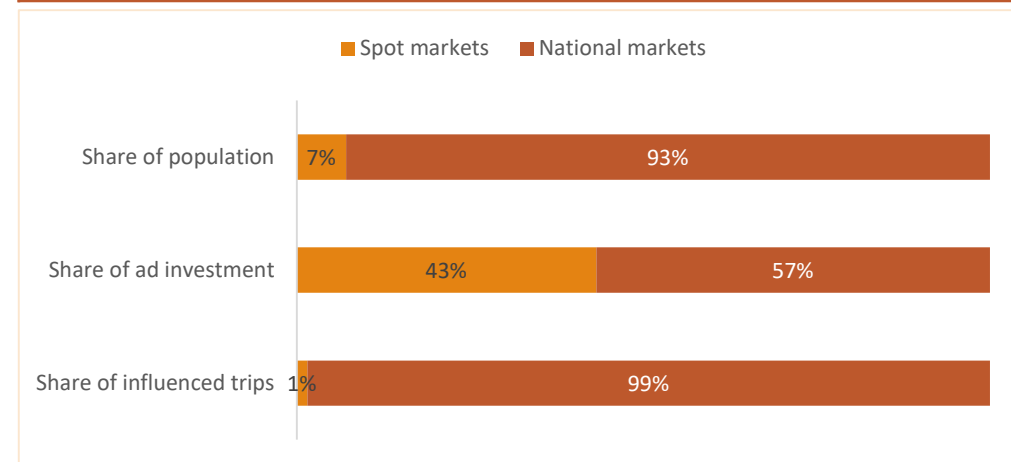
As in 2018, the vast majority of influenced trips come from national markets.

In fact, while WOT aimed 43% of its 2019 ad spending at the four key spot markets, which comprise just 7% of the traveling population, these markets generated only 1% of influenced trips.

The national markets represent an immense opportunity for WOT. Shifting resources currently invested in spot markets to the national markets could be an effective strategy.

- The spot markets are no longer seeing growth in incremental visits or repeat visits.
- The national markets continue to be strong performers even with lower spending, when that spending is balanced between TV and digital.

Total influence	2016	2017	2018	2019
Incremental trips spot markets	111,021	123,442	84,347	18,330
Incremental trips national markets	820,788	784,323	1,138,329	1,149,144
Multiple trips	0	103,870	27,444	125,698
Total influenced trips	931,809	1,011,635	1,250,120	1,293,172



Ad impact on trip metrics

SMARInsights conducts visitor profile research for WOT that details visitor activities, spending, etc. However, a snapshot of some of these metrics is key to evaluating the campaign's influence, since the ads not only impact visitation, but also impact the level of engagement with the destination.

We continue to see, for instance, that ad-aware visitors stay longer and spend more money in the state. They also visit with larger travel parties, more of which include children. This continues a year-to-year trend of ad-aware visitors staying just under 4 nights, visiting with travel parties of about 3 people, and spending about \$100 per person per day in Wyoming. Per-person per-day spending is a function of visit spending, travel party size, and length of stay. Significantly longer trips and larger travel parties among ad-aware visitors generates a lower unit spending. However, this is the highest spending of the past four years.

When asked directly, ad-aware visitors agreed that WOT's ads influenced them to visit more places in the state on their visit.

Impact on 2019 trips	Unaware	Aware
Nights	3.0	3.8
Spending	\$1,046	\$1,215
People on Trip	2.7	2.9
Kids on Trip	13%	43%
Per Person Per Day spending	\$130	\$108

Ad-aware trip specifics	2016	2017	2018	2019
Nights	3.9	3.3	3.9	3.8
Aware Spending	\$1,291	\$1,118	\$1,186	\$1,215
People on Trip	3.1	3.9	2.9	2.9
Kids on Trip	33%	41%	35%	43%
Aware Per Person Per Day Spending	\$107	\$87	\$104	\$108

Two-thirds of ad-aware visitors say the WOT ads caused them to visit more places on their Wyoming trip.



Demographics

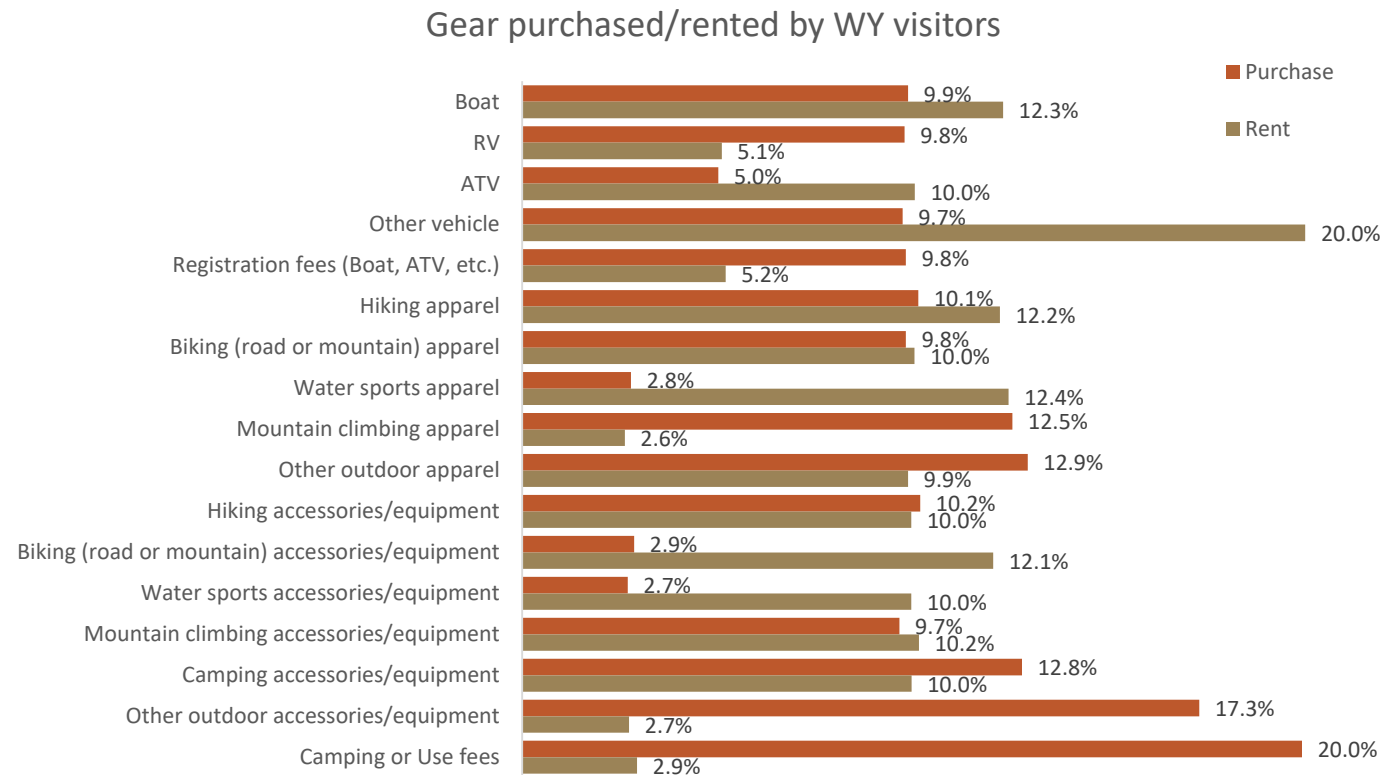
Consumers aware of WOT's 2019 advertising are more likely to be under 35 than over 55, while visitors are more evenly spread across these age groups.

Aiming ad messaging and generating visit interest among younger travelers is an effective way to continue to grow the marketplace, especially since visitor profile research shows that Wyoming visitors tend to be older.

		Ad Aware	Visitors
Age	18-34	45%	39%
	35-54	32%	23%
	55+	23%	38%
HH	Married	53%	64%
	Kids in HH	60%	56%
Education	HS/college	43%	31%
	College grad+	57%	69%
Income	Less than \$50K	36%	27%
	\$50K-\$100K	41%	37%
	\$100K+	23%	36%

Equipment purchase and rental

Wyoming and some of its peer states have added a question this year regarding procurement of outdoor equipment.



Return on investment

WYOMING OFFICE OF TOURISM 2019 AD EFFECTIVENESS & ROI
RESEARCH

2019 ROI

Compared to last year's performance, the 2019 ROI jumped 19% to \$343, a new high score for WOT on this measure and well above the average DMO ROI of \$268.

And even with a low tax base, the tax ROI remains higher than the \$11.96 industry average. For every dollar WOT invested in leisure travel marketing, \$13.73 was returned to the state from out-of-state visitor spending in Wyoming.

Campaign impact	2016	2017	2018	2019
Total influenced trips	931 K	1.01 M	1.25 M	1.29 M
Influenced visitor spending	\$1.20 B	\$1.13 B	\$1.48 B	\$1.61 B
Expenditures	\$4.38 M	\$4.40 M	\$5.14 M	\$4.69 M
ROI	\$275	\$257	\$289	\$343
Taxes generated	\$49.34 M	\$45.23 M	\$59.33 M	\$64.33 M
Tax ROI	\$11.28	\$10.28	\$11.54	\$13.73

2019 ROI by market

Looking at the performance of the campaign in individual markets shows that Chicago and Minneapolis continue to be relatively strong performers, while Seattle and Portland are less reliable producers of Wyoming visits.

However, any one spot market's performance matters very little given the volume of trips and influenced visitor spending that come from the national markets. Spot markets contribute just 1% of total influenced trips and 3% of the 2019 ROI. WOT's strong creative and product are generating interest and visitation from a broader geography.

2019	Chicago	Seattle	Portland	Minneapolis	National	TOTAL
Incremental trips	9,993	2,138	-	6,198	1,149,144	1,167,474
Repeat trips	983	-	-	-	124,715	125,698
Total influenced trips	10,976	2,138	-	6,198	1,273,859	1,293,172
Influenced visitor spending	\$13.65 M	\$2.66 M	\$0	\$7.71 M	\$1.58 B	\$1.61 B
Media spending	\$644,127	\$584,544	\$293,507	\$502,244	\$2,661,654	\$4,686,076
ROI	\$21	\$5	\$0	\$15	\$595	\$343

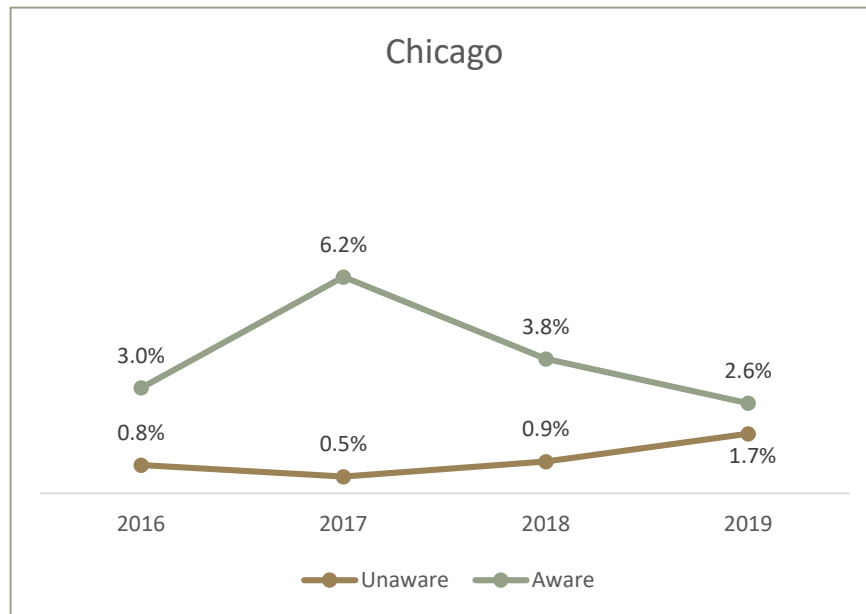
	Total spot	National	Spot markets share of total
Incremental trips	18,330	1,149,144	2%
Repeat trips	983	124,715	1%
Total influenced trips	19,313	1,273,859	1%
Influenced visitor spending	\$24.0 M	\$1.6 B	1%
Media spending	\$2,024,422	\$2,661,654	43%
ROI	\$12	\$595	3%

Market performance

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RESEARCH

Chicago

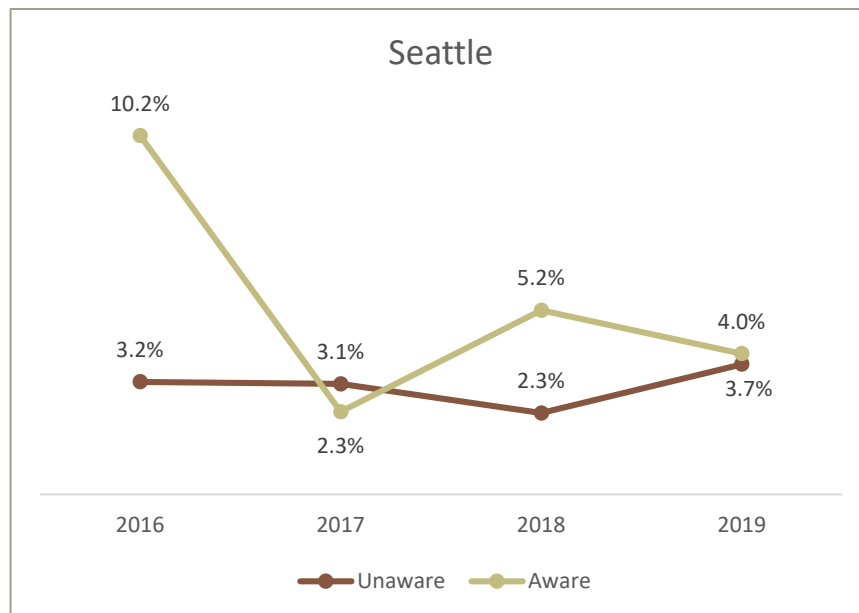
- 2019 represents the third consecutive decrease in awareness in this market, despite higher ad investment here. Chicago is above the \$0.43 cost per aware benchmark for state spot market campaigns, meaning WOT spends more than average to reach Chicagoans with its ad messaging.
- The ads do boost visitation from Chicago. But while the unaware level of visitation remains in the 1-2% range, the ads are generating fewer incremental trips.



Chicago	2016	2017	2018	2019
Awareness	51%	48%	45%	40%
Aware HHs	1,566,998	1,377,141	1,298,776	1,149,736
Cost per Aware HH	\$0.32	\$0.32	\$0.48	\$0.56
Incremental Travel	2.2%	5.7%	2.9%	0.9%
Incremental trips	35,179	78,251	37,979	9,993
Repeat trips	-	-	14,194	983
Total impacted trips	35,179	78,251	52,174	10,976
Economic impact	\$45,432,075	\$87,469,113	\$61,900,451	\$13,651,114
Media spending	\$507,285	\$441,918	\$620,943	\$644,127
ROI	\$90	\$198	\$100	\$21

Seattle

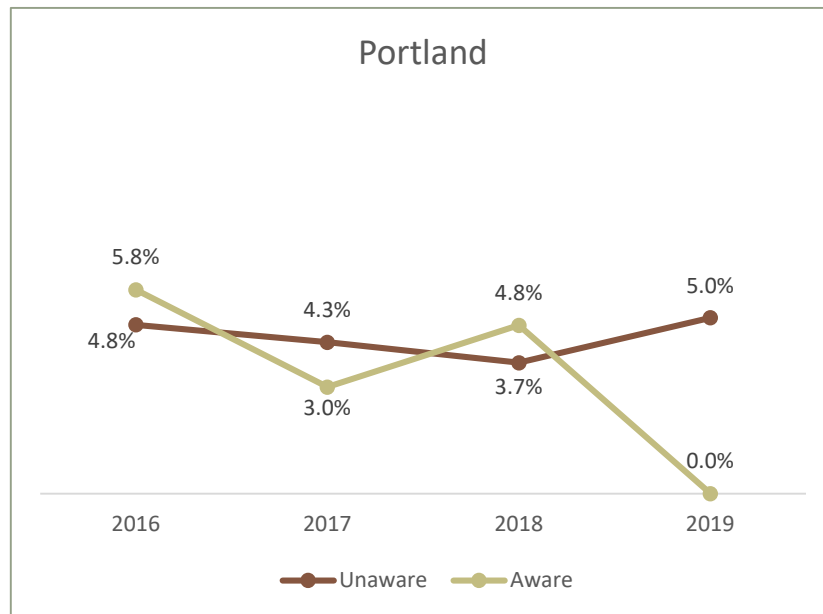
- With lower spending in Seattle this year compared to last, WOT maintained awareness and the campaign is more efficient. However, this remains a relatively expensive market, costing twice what DMOs pay on average to reach a traveling household with ad messaging.
- Unaware visitation remains at around 3%, but aware visitation has fluctuated over the years. While the 2019 ads generated some Wyoming trips from Seattle, the lift was minimal and the ROI in this individual market is quite low.



Seattle	2016	2017	2018	2019
Awareness	50%	53%	47%	48%
Aware HHs	800,189	791,411	704,438	721,673
Cost per Aware HH	\$0.81	\$0.73	\$0.86	\$0.81
Incremental Travel	7.0%	0.0%	2.9%	0.3%
Incremental trips	55,866	-	20,575	2,138
Repeat trips	-	-	-	-
Total impacted trips	55,866	0	20,575	2,138
Economic impact	\$72,148,262	\$0	\$24,411,038	\$2,659,434
Media spending	\$645,173	\$580,606	\$602,586	\$584,544
ROI	\$112	\$0	\$41	\$5

Portland

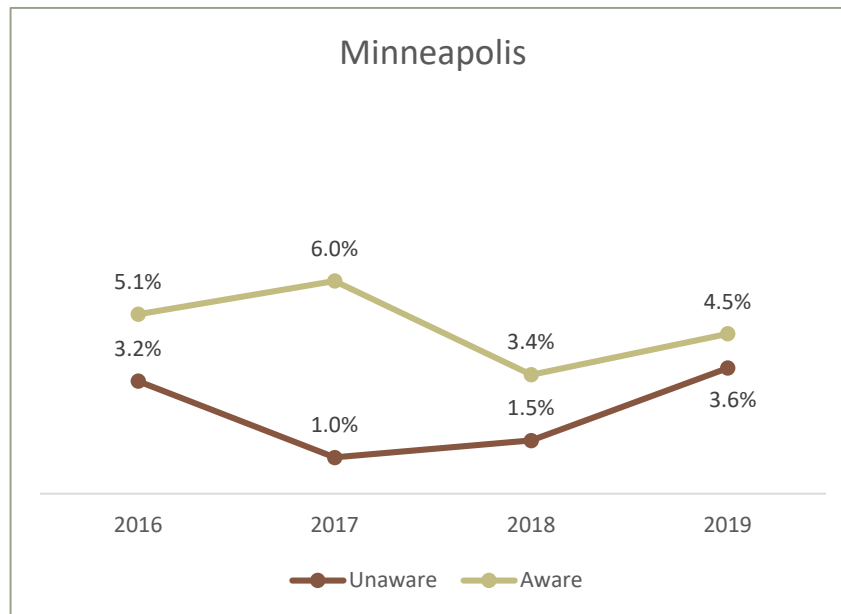
- Lower ad spending this year and lower ad awareness in Portland brings the cost per aware household nearly as high as in Seattle, and well above the \$0.43 average.
- As in Chicago and Seattle, the baseline (unaware) level of visitation from Portland remains fairly steady, between 4 and 5%, while ad-aware visitation fluctuates year to year. This year, the ads did not influence additional visits over the baseline.
- An expensive market for WOT, Portland did not generate a return on the 2019 campaign.



Portland	2016	2017	2018	2019
Awareness	55%	49%	47%	39%
Aware HHs	554,228	461,795	442,824	373,945
Cost per Aware HH	\$0.86	\$0.95	\$0.73	\$0.78
Incremental Travel	1.0%	0.0%	1.1%	0
Incremental trips	5,621	-	4,722	-
Repeat trips	-	-	13,249	-
Total impacted trips	5,621	0	17,971	0
Economic impact	\$7,259,663	\$0	\$21,321,705	\$0
Media spending	\$476,675	\$439,640	\$321,562	\$293,507
ROI	\$15	\$0	\$66	\$0

Minneapolis

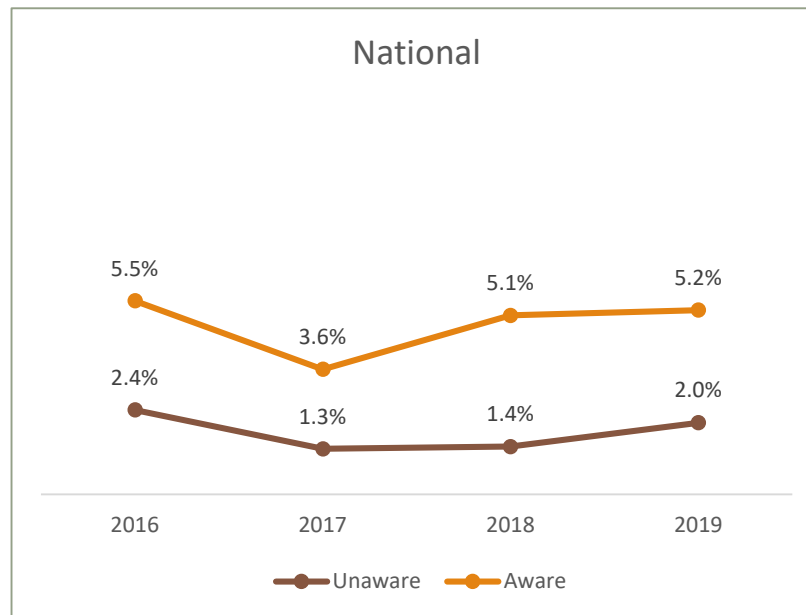
- Awareness fell in Minneapolis despite higher ad spending. The shift toward digital and away from TV could be the reason here. There is also no WOT print dedicated to this market.
- Lower awareness combined with a smaller travel increment – in part due to higher baseline visitation – means that the 2019 ads generated fewer additional trips than in years past and a smaller ROI.



Minneapolis	2016	2017	2018	2019
Awareness	51%	52%	51%	44%
Aware HHs	772,421	758,426	737,399	636,372
Cost per Aware HH	\$0.57	\$0.59	\$0.65	\$0.79
Incremental Travel	1.9%	5.0%	1.9%	1.0%
Incremental trips	14,354	37,893	13,820	6,198
Repeat trips	-	10,769	-	-
Total impacted trips	14,354	48,662	13,820	6,198
Economic impact	\$18,537,895	\$54,394,631	\$16,396,082	\$7,709,106
Media spending	\$436,959	\$445,702	\$479,473	\$502,244
ROI	\$42	\$122	\$34	\$15

National

- Awareness in the national markets reached 41% this year, potentially due to more TV spending. This is an exceptionally efficient buy for WOT, which spent well below the \$0.30 average to reach traveling households.
- Baseline visitation remains fairly level between 1-2%, and WOT's ads continue to generate a strong increment nationally. For the second year in a row, the ads influenced more than a million Wyoming visits from these markets.
- With lower ad spending and a continued strong performance, the ROI grew to nearly \$600 in the national markets.



National	2016	2017	2018	2019
Awareness	29%	39%	35%	41%
Aware HHs	26,702,760	34,129,746	30,574,162	35,920,346
Cost per Aware HH	\$0.09	\$0.06	\$0.09	\$0.07
Incremental Travel	3.1%	2.3%	3.7%	3.2%
Incremental trips	820,788	784,323	1,138,329	1,149,144
Repeat trips	-	79,887	-	124,715
Total impacted trips	820,788	864,210	1,138,329	1,273,859
Economic impact	\$1,060,001,111	\$966,013,596	\$1,350,551,757	\$1,584,323,437
Media spending	\$2,309,364	\$2,171,136	\$2,802,988	\$2,661,654
ROI	\$459	\$445	\$482	\$595

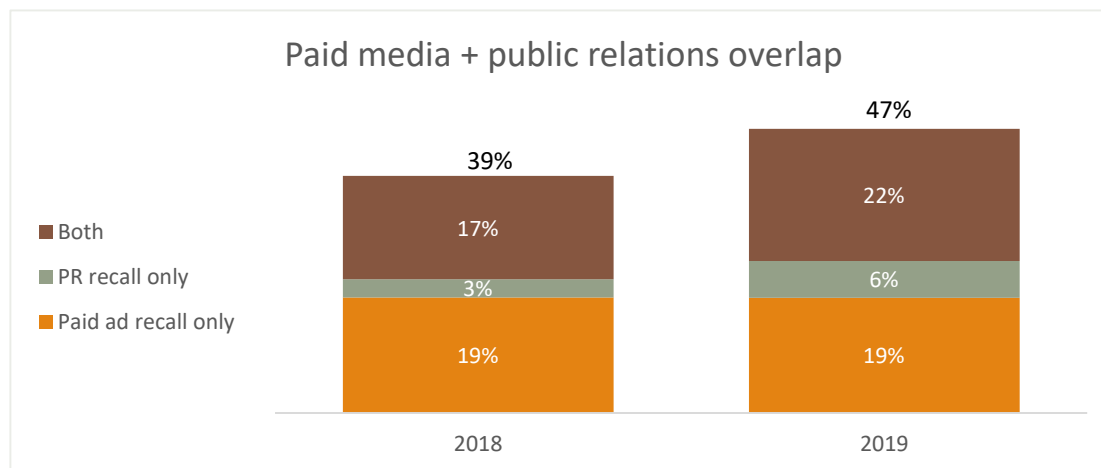
Public relations

WYOMING OFFICE OF TOURISM 2019 AD EFFECTIVENESS & ROI
RESEARCH

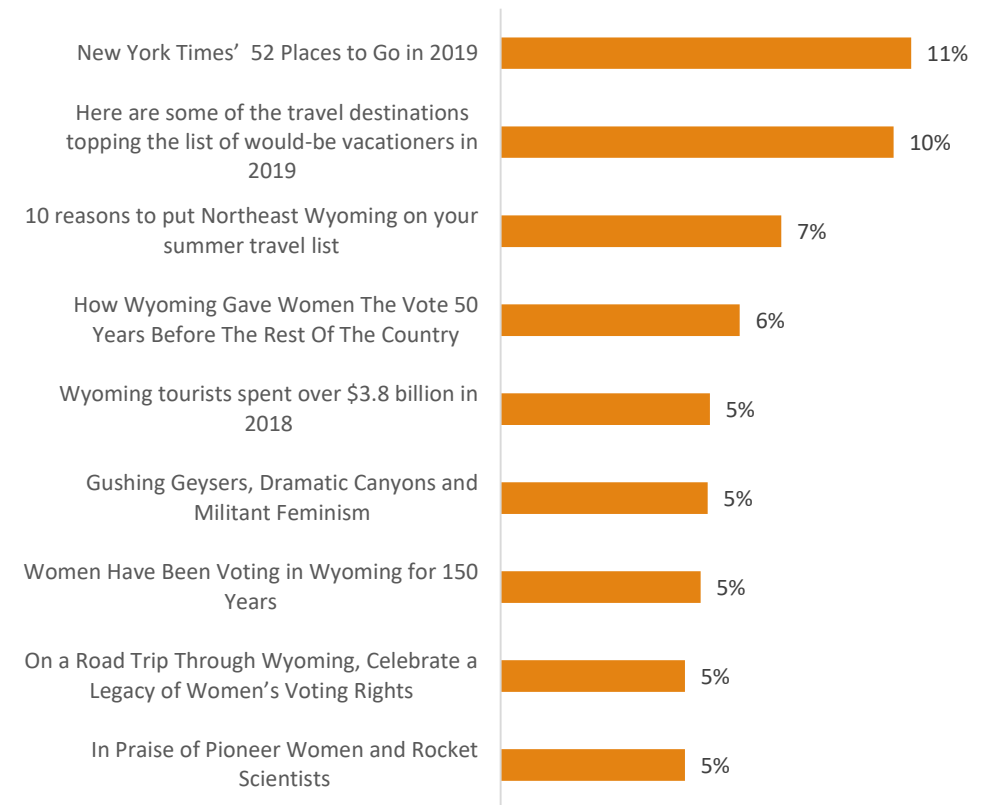
Recall of public relations

The focus of ad effectiveness research is paid advertising, but WOT's integrated marketing effort also include public relations, the reach of which it is important to track. This year, 28% of traveling households recall WOT's PR, up from just 20% in 2018.

WOT's total marketing reach in 2019 – combining PR with paid ads – was 47%. This was boosted by the New York Times' featuring Wyoming as one of its "52 Places to Go in 2019" as well as coverage of the state's leadership in women's suffrage.



Recall of specific PR pieces



Recall of public relations

Few consumers recall only the PR; rather the PR and paid ads provide reinforcing exposures to the state's messaging.

PR extended the reach of the 2019 campaign by 5.7 million traveling households, up from an additional 2.7 million last year.

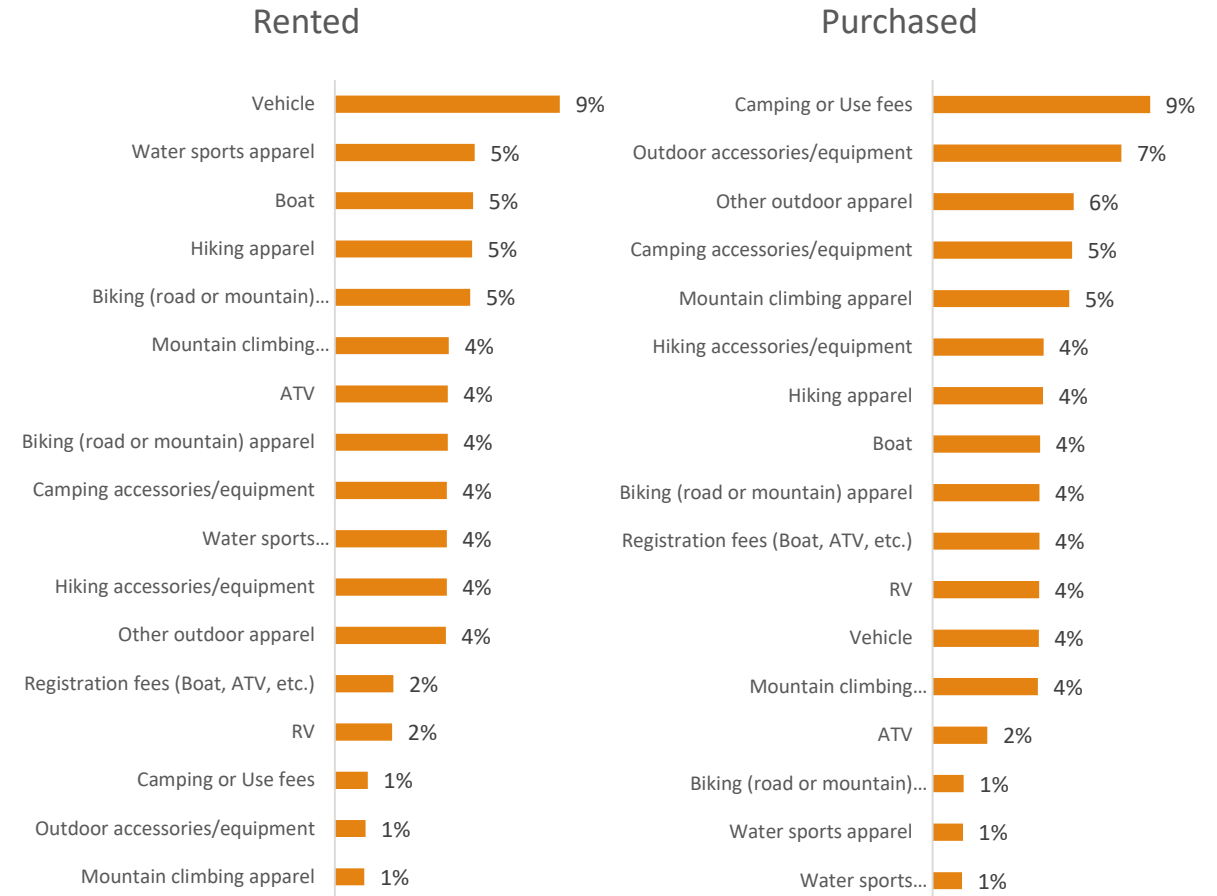
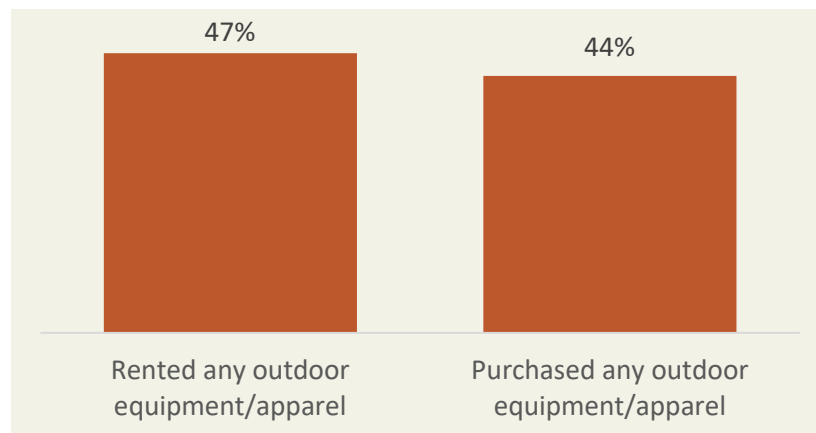
2019	Chicago	Seattle	Portland	Minneapolis	National	Total
Targeted HHs	2.9 M	1.5 M	949 K	1.4 M	88.4 M	95.2 M
Ad or PR Recall	48%	52%	46%	50%	47%	47%
Total Reach	1.4 M	780 K	438 K	725 K	41.2 M	44.5 M
Additional HHs PR Reached	224,948	58,218	64,034	88,145	5,306,944	5,742,289

Outdoor equipment rentals/purchases

WYOMING OFFICE OF TOURISM 2019 AD EFFECTIVENESS & ROI
RESEARCH

Outdoor equipment

- A new question was put in place to explore which (if any) specific items Wyoming visitors rented or bought during their trips.
- In total, 47% indicate renting any of the equipment/apparel/other items, while 44% indicate buying any of these.
- Vehicles top the list of rented items, followed by water, hiking, and biking apparel and gear. Of the purchased items, camping fees top the list, followed by outdoor accessories and equipment.



Questionnaire

WYOMING OFFICE OF TOURISM 2019 AD EFFECTIVENESS & ROI
RESEARCH

Questionnaire

Wyoming Travel & Tourism 2019 Advertising Effectiveness

S1a. What is your ZIP code? _____

S1. Please indicate if each of the following applies to you...Select all that apply.

[ROTATE]	Yes	No
I regularly use social media like Facebook, Twitter or Instagram		
I normally take at least one leisure trip a year that involves an overnight stay or is at least 50 miles from home [IF NO, TERMINATE AFTER SCREENING QUESTIONS]		
I regularly engage in some form of physical exercise like walking, biking or participating in sports to help stay healthy		
I use video streaming services like Hulu or Netflix		

Age. What is your age? _____ → TERMINATE IF UNDER 18

S2. Who in your household is primarily responsible for making decisions concerning travel destinations?

- 1Me
- 2Me and my spouse/partner
- 3My spouse/partner → TERMINATE

Q1X. How familiar are you with each of the following states, in terms of what they have to offer as a place for a leisure trip?

[ROTATE]	Not at all familiar	Not very familiar	Somewhat familiar	Very familiar
Wyoming				
Colorado				
Idaho				
Montana				
New Mexico				
South Dakota				
Texas				
Utah				
Nebraska				

Q2. How likely are you to take a leisure trip to any of the following states in the next year?

[ROTATE]	Not at all likely	Not very likely	Somewhat likely	Very likely	Already planning a trip
Wyoming					
Colorado					
Idaho					
Montana					
New Mexico					
South Dakota					
Texas					
Utah					
Nebraska					

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1

Q3. When have you visited each of the following states? Select all that apply.

[ROTATE]	Visited in 2019	Visited in 2018	Visited 3-5 years ago	Visited more than 5 years ago	Have never visited
Wyoming					
Colorado					
Idaho					
Montana					
New Mexico					
South Dakota					
Texas					
Utah					
Nebraska					

[HAVE THEM RATE WYOMING AND ONE OTHER STATE
PRIORITY FOR RATING: FAMILIARITY Q1_STATE>1, Q3_STATE=1 OR Q2_STATE>2]

Q4. Please consider the following series of descriptions that could be used to describe Wyoming. Please rate how well each statement describes the state as a travel destination. You may not be very familiar with Wyoming, but please rate it based on whatever you know or have heard about the state.

[ROTATE]	Not at all				Completely describes
Is home to Yellowstone National Park	1	2	3	4	5
Has diverse natural landscapes and scenery	1	2	3	4	5
Is where the Old West lives on	1	2	3	4	5
Offers great camping and RVing options	1	2	3	4	5
Has interesting historical sites and museums	1	2	3	4	5
Is a place to discover American Indian culture	1	2	3	4	5
Offers abundant outdoor recreation options	1	2	3	4	5
Is a place to experience cowboy culture	1	2	3	4	5
Has exceptional wildlife viewing	1	2	3	4	5
Is great for a winter destination	1	2	3	4	5
Is a place to have new experiences	1	2	3	4	5
Has modern, upscale hospitality options	1	2	3	4	5
Travel is safe and accessible	1	2	3	4	5
Where I can find adventure	1	2	3	4	5
Is an easy to get to destination	1	2	3	4	5
Is a good place for family vacations	1	2	3	4	5
Is a good value for the money	1	2	3	4	5
Is a good year-round destination	1	2	3	4	5

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2

Provides a variety of dining choices	1	2	3	4	5
Is welcoming to all people	1	2	3	4	5
Is a good place for a road trip	1	2	3	4	5
Has wide-open roads to explore	1	2	3	4	5

Q5 [EARNED MEDIA]. Since January of 2019, please indicate if you saw any articles or stories related to the following: Select all that apply.

[ROTATE]
New York Times' 52 Places to Go in 2019
In Praise of Pioneer Women and Rocket Scientists
On a Road Trip Through Wyoming, Celebrate a Legacy of Women's Voting Rights
10 reasons to put Northeast Wyoming on your summer travel list
Wyoming tourists spent over \$3.8 billion in 2018
How Wyoming Gave Women The Vote 50 Years Before The Rest Of The Country
Gushing Geysers, Dramatic Canyons and Militant Feminism
Women Have Been Voting in Wyoming for 150 Years
Here are some of the travel destinations topping the list of would-be vacationers in 2019
None of these

Q6. In the course of planning for any recent or upcoming trips to Wyoming, have you gathered information in any of the following ways? Select all that apply. [ROTATE]

Googled Wyoming
Requested Wyoming's visitor guide
Visited Wyoming's travel website
Visited Wyoming's Facebook Page
Followed Wyoming's Twitter account
Followed Wyoming's Instagram feed
Searched an online travel agency like Expedia for Wyoming information
Searched online review sites like TripAdvisor or Yelp for Wyoming information
Requested information using other method
None of these

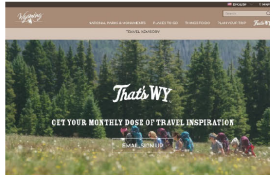
[IF VISITED WYOMING WEBSITE AT Q6 ASK Q7b]

7b. Is this the Wyoming website you visited?
YES/NO

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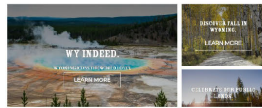
3

Questionnaire



OPEN YOUR MIND AND INVIGORATE YOUR SENSES.

Recreate entire trip plans for exploring the mountains.



[INSERT SCREEN SHOT OF WEBSITE, [Hoempage.jpg](#)

[IF NON-VISITOR AT Q3 FOR 2018 AND 2019, SKIP TO Q.XX BEFORE ADS]

[ASK IF Q3 = 2019]

Q7. When did you visit Wyoming in 2019? Select all that apply.

January
February
March
April
May
June
July
August
September
October

Q9. Please indicate which of these trips would you consider your main visit to Wyoming and which were to visit friends and family.

Insert month and year	A. Main trip [EXCLUDE IF ONLY ONE TRIP]	B. Visiting friends or relatives

[PRIORITY – 2019, then 2018]

1. NON VFR MAIN TRIP
2. NON VFR NON MAIN TRIP
3. VFR MAIN TRIP]

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4

Q10. Which of the following best describes your [INSERT MONTH AND YEAR OF PRIORITY TRIP] trip to Wyoming?

1. Wyoming was my main destination
2. I was ultimately headed somewhere else, but included a visit to Wyoming
3. Wyoming was one of several places I decided to visit on this trip

Q12. How far in advance did you begin planning that [INSERT MONTH AND YEAR OF PRIORITY TRIP] trip to Wyoming?

- Less than 1 month
At least 1 month, but less than 2 months
At least 2 months, but less than 3 months
At least 3 months, but less than 6 months
6 months or more

Q13. Would you say the main reason you chose Wyoming was because...? (Please select only one.)

- The state has a variety of things to see and do
You were attending a specific event (Please specify _____)
You wanted to go to a specific attraction (Please specify _____)
You just wanted to see what the state had to offer
A friend or relative recommended it
You had business in the state
It was a good value for the money spent
Other (Please specify _____)

Q15. Including you, how many people were in your travel party on your [INSERT MONTH AND YEAR OF PRIORITY TRIP] to Wyoming? ____

Q16. [ASK IF Q15>1] Please classify your travel party below. If none, please enter 0:

	Insert #
Spouse/significant other	[allow only 1]
Children/grandchildren age 0-12	
Children/grandchildren age 13+	
Other family	
Friends/acquaintances	
Total travel party [AUTO CALCULATE]	[Total should be Q15 minus 1]

Q18. How many nights did you spend in Wyoming during [INSERT MONTH AND YEAR OF MAIN TRIP]? ____

Q19. [ASK IF Q18>0] On this Wyoming trip, what form(s) of lodging did you use, and how many nights did you stay in each? (Enter number of nights for all lodging types that apply. If you did not stay overnight, please enter 0.)

	# nights stayed
Hotel, motel, inn, lodge, bed & breakfast or resort	
Dude ranch	
RV park/campground	
Homesharing/vacation rental, i.e., booked through Airbnb, Homeaway, etc.	

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Condominium or timeshare	
With family or friends	
Total nights [AUTO-CALCULATE]	

Q20. Which of the following activities did you participate in during your most recent trip to Wyoming? Select all that apply. [ROTATE]

Hiking or backpacking	Visiting Native American sites
Visiting a state or national park	Attending a pow wow
Bicycling or mountain biking	Attending a festival or fair
Mountain climbing	Attending performing arts (music/theater)
Rock climbing	Visiting historical sites
Horseback riding	Attending a rodeo
Hunting	Visiting an archeological site
Camping	Wildlife watching
Snow skiing or snowboarding	Bird watching
Snowmobiling	Scenic drive
Canoeing or kayaking	Sightseeing tour
River rafting	Golfing
Boating	Visiting a dude ranch
Fishing	Visiting hot springs
Visiting museums	Shopping for Wyoming-made goods
Visiting breweries or distilleries	Gambling
	Other, please specify _____
	None of these

[ONLY SHOW THE ACTIVITIES THEY CHOSE ABOVE PLUS NONE AND ASK:]

Q20a. Of these activities, please indicate any that were a major influence for selecting Wyoming. You may choose up to 3.

Q20b. Did you purchase or rent any of the following outdoor items during your trip? Select all that apply.

	Purchase	Rent
Boat		
RV		
ATV		
Other vehicle		
Registration fees (Boat, ATV, etc.)		
Hiking apparel		
Biking (road or mountain) apparel		
Water sports apparel		
Mountain climbing apparel		
Other outdoor apparel		
Hiking accessories/equipment		
Biking (road or mountain) accessories/equipment		
Water sports accessories/equipment		

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Questionnaire

Mountain climbing accessories/equipment		
Camping accessories/equipment		
Other outdoor accessories/equipment		
Camping or Use fees		

I purchased / rented none of these items [CHECKBOX]

[SHOW MAP FOR Q21 AND Q22] I:\Questionnaires\Wyoming\2019\asset-sticker-map-no-key.jpg



National Parks
Black to Yellow
Park to Park
Rockies to Tetons
Salt to Stone

Q21. Please click all areas of Wyoming you visited on your trip.

Q22. Which of the following places or attractions did you visit in [INSERT REGION NAME]? *Select all that apply.*

[REPEAT FOR EACH REGION SELECTED]

Rockies to Tetons	Park to Park	Salt to Stone	Black to Yellow
Dubois	Fort Laramie National Historic Site	Flaming Gorge National Recreation Area	Buffalo
Curt Gowdy State Park	Ayres Natural Bridge	Afton	Buffalo Bill Center of the West
Encampment	Bighorn Sheep Interpretive Center	Alpine	Campbell County
Shoshone National Forest		Bear River State Park	CAMP-PLEX
	Casper	Evanston	Cody
			Devils Tower National Monument
Lander	Douglas	Rock Springs	Fort Bridger State Historic Site
Laramie	Alcova	Fort Bridger State Historic Site	Greybull

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Museum of the Mountain Man	Edness K. Wilkins State Park	Fossil Butte National Monument	Gillette
	Glendo State Park	Green River	Kaycee
Pinedale	Glenrock	J. C. Penney Historic District	Keyhole State Park
Rawlins	Guernsey State Park	Kemmerer	Lovell
Riverton	Hot Springs State Park	Museum of the Mountain Man	New Castle
Rock Springs	Legend Rock Petroglyph Site	Intermittent Springs	Powell
Saratoga	National Historic Trails Interpretive Center	Pinedale	Big Horn Mountains
Seminole State Park	Oregon Trail Ruts National Landmark	Green River Lakes	Big Horn Canyon National Recreation Area
Sinks Canyon State Park	Riverton	Teton Village	Sundance
South Pass City State Historic Site	Thermopolis	Star Valley	Vore Buffalo Jump
			Big Horn National Forest
University of Wyoming	Pathfinder Reservoir	Bridger-Teton Forest	
Vedauwoo			
Campground and Rec Area	Wind River Canyon Scenic Byway	Jackson	Worldand
Wyoming Frontier Prison	Wind River Casino		Sheridan
Medicine Bow National Forest	Wind River Indian Reservation		Black Hills National Forest
	Wyoming Dinosaur Center		Meeteetse
Boysen State Park	Wyoming Pioneer Museum		
	Torrington		
	Cheyenne		

Q23. To better understand your travel habits, we are interested in finding out the approximate amount of money you and other members of your travel party spent while in Wyoming on your trip. Please estimate how much your travel party spent in total on...

Please complete all fields – best estimate is fine. If no expenditures in a category enter a "0"

Lodging/accommodations _____
Meals/food/groceries _____
Entertainment/attractions _____
Shopping _____
Entertainment such as shows, theater or concerts _____
Transportation to Wyoming _____
Transportation while in Wyoming _____
Other _____

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Q24. Did you post any information about this trip on the following outlets? Select all that apply.

Facebook
Twitter
Instagram
YouTube
Blogs
Other social media
None of these

Q25. Thinking about your overall travel experience in Wyoming, would you say it was...?

Excellent
Very good
Good
Fair
Poor

Next you will be shown a variety of types of advertisements. Some advertisements will include sound so please adjust your volume to a comfortable level. Please review each ad carefully and answer the questions that follow. [ROTATE MEDIA AND ADS WITHIN MEDIA] I:\Ads Master\Wyoming\Wyoming ad effect 2019\Creative\USE

TVADS

MPLS_SEA_TV_WildGirl	MPLS_SEA_TV_WildGrandpa
# - 361802438	# - 361803100

TV. How many times have you seen this television ad?

Never
Once
Two or three times
More than three times

ONLINE

Digital_Adventure_2.mp4	Digital_Adventure_3.mp4	Digital_Family_1.mp4
# - 361803961	# - 361804624	# - 361806256
Digital_Family_3.mp4	Digital_Western_1.mp4	Digital_Western_3.mp4

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Questionnaire

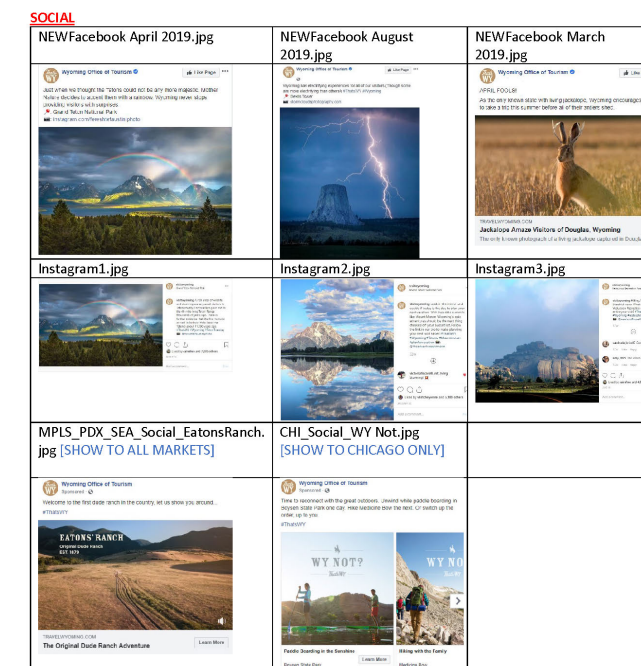


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PRINT. Please indicate if you have seen each of these ads before.

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SOCIAL. Please indicate if you have seen each of these ads before.



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Questionnaire

NATIVE

Native_TAS.jpg	Native_Vela.jpg
	
sponsored by Travel Wyoming Unlimited Adventure How Teller Adaptive Sports teams up with people of all ages and abilities to eliminate limits.	sponsored by Travel Wyoming A Wyoming Welcome David Vela wants Wyoming's diverse landscape to be enjoyed by an equally diverse audience. Here's what he's doing about it.

Native Videos

Native_TAS video.mp4	Native_Vela video.mp4
	
# - 361810495	# - 361810861

NATIVE. How many times have you seen this ad?

- Never
- Once
- Two or three times
- More than three times







RADIO

Radio_Adventures.wav	Radio_TrailGuide.wav
	
# - 361813475	# - 361814773

RADIO. How many times have you heard this radio ad?

- Never
- Once
- Two or three times
- More than three times

OOH

Chicago		
CHI_OOH_Cowgirl.jpg	CHI_OOH_GrandPris.jpg	CHI_OOH_Kayak.jpg
		
CHI_Transit_Cowgirl.jpg	CHI_Transit_GrandPris.jpg	CHI_Transit_Kayak.jpg
		

Seattle

SEA_Transit_GrandPris.jpg	SEA_Transit_Kayak.jpg	SEA_Transit_MedicineBow.jpg
		

OOH. Please indicate if you have seen each of these ads before.

[AFTER ALL ADS HAVE BEEN SHOWN, ASK Q22a-Q22b]

Q22a. Now please indicate how much you agree that all the ads you have just seen for Wyoming show a place...

[ROTATE]	Strongly agree				Strongly disagree
With vast landscapes full of endless natural beauty	5	4	3	2	1
Where I can seek adventure, do something I've never done before	5	4	3	2	1
Where I can disconnect with the hectic pace of daily life	5	4	3	2	1
Where I can reconnect with my family and enjoy simple pleasures	5	4	3	2	1
Where I can indulge a passion for the great western outdoors	5	4	3	2	1
To escape to the comfort of the wide open spaces	5	4	3	2	1
Where I can enrich and expand my understanding of western lore and culture	5	4	3	2	1
Where I feel a sense of freedom and release	5	4	3	2	1

Q22b. How much does this campaign make you want to....? [ROTATE]

	5	4	3	2	1
Learn more about things to see and do in the state	5	4	3	2	1
Go to the state website, TravelWyoming.com	5	4	3	2	1
Order or download a Wyoming visitor guide					
Visit the state	5	4	3	2	1
Talk to friends and family about Wyoming					
Follow Wyoming social media					
Talk about or share Wyoming information online					
Watch videos and/or view pictures of Wyoming					
Sign up for Wyoming emails					

Q22c. [ASK IF VISITOR AND AWARE ANY AD] Did the Wyoming ad(s) you saw cause you to visit more places on your Wyoming trip? YES/NO

DEMOGRAPHICS

The following questions are for classification purposes only, and will help us understand different groups of people.

Q23. For each personal value, how important, if at all, are each of the following as guiding life principles in your life?

[ROTATE]	Not at all important			Average importance		Extremely important
	1	2	3	4	5	6 7
Adventure: seeking adventure and risk						
Curiosity: wanting to explore and learn about new things						
Self-Reliance: Being self-reliant, choosing my own goals						
Freedom: having freedom of action and thought						
Being in Tune with Nature: fitting into nature						
Enjoying Life: doing things because I like them						
Having fun: having a good time						
Duty: fulfilling obligations to family, community and country						
Helpfulness: making the effort to assist others						
Friendship: having close supportive friends						
Authenticity: being true to myself						
Tradition: preserving time-honored customs						

Questionnaire

[ROTATE]	Not at all important		Average importance		Extremely important	
Being Youthful: feeling young						
Excitement: having stimulating experiences						
Simplicity: keeping your life and mind as uncluttered as possible						
Working hard: always giving my best effort						

Marital. Are you currently...?

- Married
- Divorced/Separated
- Widowed
- Single/Never married

PPinHH. Including you, how many people are currently living in your household? _____

KIDSinHH. [ASK IF PPinHH>1] How many living in your household are children under the age of 18? _____

Education. Which of the following categories represents the last grade of school you completed?

- High school or less
- Some college/technical school
- College graduate
- Post-graduate degree

Income. Which of the following categories best represents the total annual income for your household before taxes?

- Less than \$35,000
- \$35,000 but less than \$50,000
- \$50,000 but less than \$75,000
- \$75,000 but less than \$100,000
- \$100,000 but less than \$150,000
- \$150,000 or more

Ethnicity. What is your race/ethnicity? [ALLOW MULTI]

- White/Caucasian
- Black/African-American
- Latino/Hispanic
- Asian
- American Indian/Native Alaskan
- Other (Specify _____)

Gender. Do you identify as...?

- Male
- Female
- Other
- Prefer not to answer

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