

# Wyoming Office of Tourism Scoping Paper

September 2018

## Management Audit Committee

*Representative Michael Madden, Chairman*  
*Senator Dave Kinskey, Vice Chairman*

*Senator Paul Barnard*

*Senator Leland Christensen*

*Senator John Hastert*

*Senator Tara Nethercott*

*Senator Charles Scott*

*Representative Dan Kirkbride*

*Representative Jerry Obermueller*

*Representative Charles Pelkey*

*Representative Nathan Winters*

## Prepared by

*Joy Hill, Interim Program Evaluation &  
Research Manager*

*Karla Smith, Senior Program Evaluator*



**Notice on Auditing Standards:** Scoping papers are not an auditing standards-based research product. Scoping papers provide the Management Audit Committee with a summary of a potential evaluation topic (including descriptions of basic agency, program, or procedural functions) on which to decide if a full program evaluation is required. Evaluators prepared this scoping paper with information obtained from the agency and staff. Evaluators did not independently verify this information according to governmental auditing and evaluation standards.

If this topic moves forward to a full evaluation, the evaluation will be conducted, as much as practicable, according to generally accepted governmental auditing standards promulgated by the Comptroller General of the United States, as required by W.S. 28-8-107(e). Information contained in this paper, as well as all subsequent information gathered during the evaluation will be independently verified and reported according to the auditing standards.

## Wyoming Office of Tourism (the Office) Terminology

*These definitions are provided to help explain key concepts in the scoping paper. The language may not directly reflect legal definitions used in federal or state statutes or rules and regulations.*

**Benelux:** Belgium, Netherlands, and Luxembourg.

**Brand/branding:** Platform under which all marketing efforts are developed and deployed. The brand that best demonstrates the identity (look and feel) of the Wyoming tourism product.

**Conversion:** Influence of an advertising campaign to “convert” potential visitors into actual visitors.

**Competitive position:** Defining how to differentiate Wyoming’s unique assets and marketing approach that creates value in the mind of the consumer and setting the State apart as the vacation destination of choice in comparison to other states.

**Competitive sets:** Wyoming’s destination competitors who offer similar vacation experiences, e.g. outdoor experiences and well-known national parks. These competitors include Colorado, Idaho, Montana, South Dakota, Utah, and other mountain states.

**Creative:** Visual components of an advertising campaign such as tv spots, digital ads, billboards, and magazine ads.

**Destination Marketing Organization (DMO):** Public organizations whose purpose is to increase travel and its associated benefits. Local DMOs include city and county organizations and state tourism offices. DMOs are sometimes referred to as Convention & Visitor Bureaus.

**Engaged User:** Consumer who actively participates in the Office’s advertising channels including visiting the website, signing up for e-newsletters, requesting a Traveler’s Guide, posting on social media, etc.

**Global Sales and Services:** Department within the Office tasked with growing the travel trade sector (packaged travel), both domestically and internationally, and works directly with travel wholesalers and operators who offer a Wyoming vacation and have a direct distribution system to consumers.

**Halo Effect:** Influencing effect of the tourism promotion campaign that influences opinions, e.g. increasing not only visitation, but also impacting other perceptions about Wyoming (a great place to live, a great place to start a business, a great place for college, a great place for retirement).

**Highly Qualified Consumer:** Consumer whose target psychographics (definition below) and/or demographics (age, race, gender, income, education) align with the Wyoming vacation experience.

**Incremental Travel:** Measurable impact of destination marketing on travel plans; the distinction between travelers who were affected by marketing and those who were not.

**Messaging:** Communication the Office sends out through email, print, and media containing information, news, vacation ideas, etc. to both potential travelers and in-state stakeholders.

**Nordics:** Countries of Norway, Sweden, and Denmark.

**Psychographic:** Consumer’s personality traits, values, attitudes, interests, and lifestyles around which marketing campaigns are developed.

**Strategic Partner:** Organizations that share the Office’s target audience, brand value and/or marketing goals.

**Trade Associations:** Associations focused on specific segments of the market.

## Introduction

On March 8, 2018, the Management Audit Committee (Committee) met and selected the Wyoming Office of Tourism (the Office) as a scoping topic.

Generally, the Committee expressed interest in the following six topics:

1. The impact the Office's efforts have had on the State.
2. The available sources of funding for tourism promotion through the Office.
3. The degree to which the Office works with counties, cities, and the private sector to promote tourism.
4. The identification of alternative advertising tools.
5. Whether the Office should be subject to a sunset provision.
6. A comparison of Wyoming's tourism promotion efforts with other states, specifically: Alaska, Colorado, Idaho, Montana, North Dakota, South Dakota, and Utah.

Tourism promotion in Wyoming that focuses on travel marketing to increase the number of visitors to the State has been evolving since 1947. Since that time, the Office has undergone changes in name and organization, as well as in development and implementation of various tourism promotion campaigns.

## Background

In 1947, the Legislature originally assigned responsibility of tourism promotion to the Wyoming Commerce and Industry Commission. Specifically, the Wyoming Commerce and Industry Commission "shall assemble and distribute information concerning the scenic, recreational, agricultural, mineral, industrial and other opportunities or resources of Wyoming, shall develop closer cooperation between public and private agencies engaged in stimulating exploitation of Wyoming resources and shall formulate and activate such other programs as are in the Commission's opinion, necessary or proper in promoting development of the State's economic welfare." The Wyoming Commerce and Industry Commission consisted of a five-member board of commissioners appointed by the governor, who represented "a cross section of the state's economic, social, and geographic composition."

In 1955, the Legislature created the Wyoming Travel Commission to continue the original statutory duties and obligations of the Wyoming Commerce and Industry Commission.

In 1991, reorganization of Wyoming State Government commenced, and in 1993, the Legislature placed the Wyoming Travel Commission under the Department of Commerce.

In 1998, the Wyoming Travel Commission was placed under a newly created quasi-governmental agency, the Wyoming Business Council, and became the Division of Tourism.

Most recently, in 2007, the Legislature created the Wyoming Tourism Board as a stand-alone agency. The Wyoming Tourism Board is composed of a nine-member board, appointed by the governor and approved by the Wyoming State Senate. The Business Council Division of Tourism became the Wyoming Office of Tourism and serves as staff to the Wyoming Tourism Board.

### **The Office Campaigns Over the Years**

Although initial tourism promotion efforts began in 1947, it was not until 1963 that the Wyoming Travel Commission contracted with an advertising agency from Denver, Colorado to “create, produce, and place the paid advertising campaign” known as “Big Wyoming.” Over the years, the Office has developed a variety of campaigns/brands to adjust to national trends. Some of these campaigns were “Find Yourself in Wyoming,” “Retro,” “Shadow Box,” “Forever West-Reflections,” and “Forever West-Roam Free.” Figure 1, below, is an example of advertising campaigns promoting tourism to Wyoming, provided by the Office. Appendix A contains several other examples of the Office campaigns over the years.

**Figure 1. “That’s WY” current campaign image**



Source: Image provided by the Wyoming Office of Tourism.

### **Current Organization of the Office**

For budgeting purposes, the Office is considered a single program. However, there are several, separate tourism promotion activities conducted within the agency, such as Strategic Partnerships, Global Sales and Services, and Brand Studio. In 2007, the Legislature authorized the Film Industry Financial Incentive

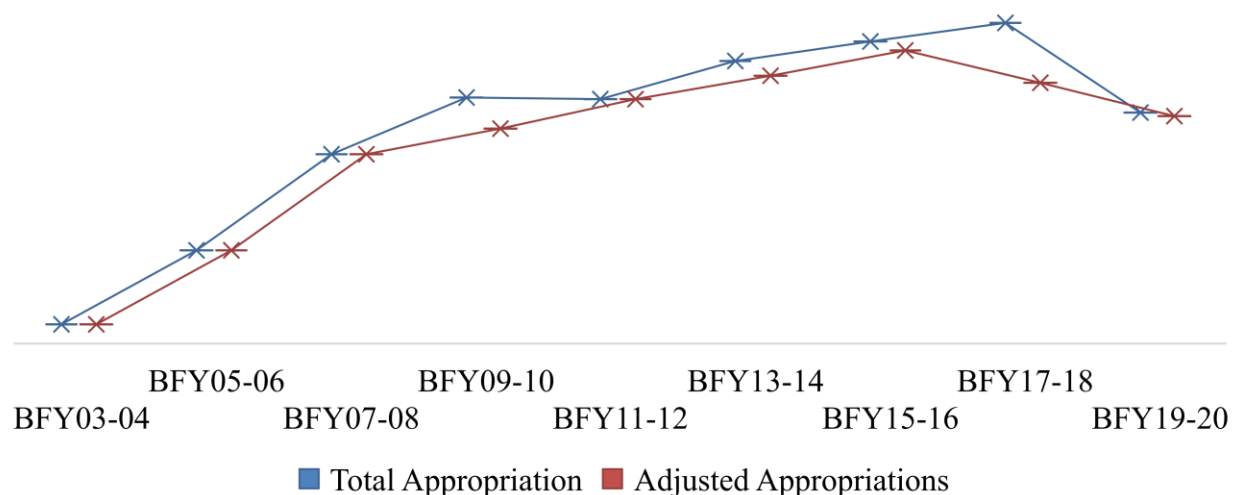
(FIFI), it was established as a separate program within the Office. The FIFI sunset on June 30, 2016.<sup>1</sup>

The Office has 24 full and part-time positions. Starting in 2013, the Office examined its organizational structure and ways in which to modify the structure to better achieve its strategic goals. Office officials noted the “structure feeds strategy” employed is a “fundamental principle for highly effective organizations.” As a result, the Office has engaged in restructuring its organization to reflect this principle. The current organizational chart for the Office can be found as Appendix B.

### **Budget History**

Since BFY2007, the Office total appropriations have remained consistent, as seen in Figure 2, below. The Office budget in the 2003-2004 biennium was \$11,292,417. For the 2019-2020 biennium the budget is \$25,129,390. For details about the Office budget, including budget reductions by year, see Appendix C.

**Table 2. Wyoming Office of Tourism Biennium Budget – Appropriated Funds, 100% GF**



Source: LSO reproduction of information provided by the Wyoming Office of Tourism.

## **Tourism Promotion Impact to the State**

The Office engages in a variety of activities to determine the impact its tourism promotion practices have on the State.

### **Macro-level and Micro-Level Analyses**

The Office engages in both macro-level and micro-level analyses.

**Macro-level Analysis.** The macro-level analyses are based on benchmarks, to identify growth within the leisure and hospitality sectors. Specific macro-analysis includes review of lodging tax collection and revenue; accommodation

<sup>1</sup> During the 2018 Legislative Budget Session, House Enrolled Act 62, Section 303 authorized the carryover of the FIFI unobligated program funds, which were set to revert June 30, 2018.

occupancy, average daily rate, and revenue per available room; sales and use tax collection; and jobs in leisure and hospitality sector.

According to Office officials, an annual advertising effectiveness study is conducted to measure the return on investment (ROI) related to paid media campaigns. This study assists the Office in determining the overall effectiveness of paid media campaign performance “among various geographic and demographic audience segments.” Office officials further noted, beginning in 2018, it “will also have the ability to measure a small sample of consumers who were exposed to the brand campaign who physically arrived in Wyoming.”

**Micro-level Analysis.** Micro-level analysis includes ongoing monitoring of the performance of all paid media “channels,” e.g. broadcast, digital, social, website, etc., to ensure efficiency. The figure below illustrates the Key Performance Indicators (KPIs) the Office monitors to ensure paid media dollars are used efficiently and effectively.

**Figure 3. KPIs to Measure Efficiency and Effectiveness**

	Channel	KPI's prior to 2017	KPI's 2017 - present
Paid Media	Broadcast	Impressions	Awareness and Return on Ad Spend
	Digital	Impressions/CTR/CPC	Conversions/Cost Per Conversion/Cost Per Engaged User
			Arrivals per million
Owned Channels	TravelWyoming.com	Total Sessions	Total Sessions by Channel
		Pageviews	Time on Site
			Scroll Depth
			#of Pages Viewed
		Partner Referrals	On-site referrals
			Clicks to partner site
	Social	Followers	Engagements (Likes, shares, comments)
			Website sessions driven from social
			Conversions
	Fulfillment	Traditional Fulfillment	Physical and Digital
	Video Content	Video Views	Video Completion Rate
	Email	Total Subscribers	Open Rate
			Click Through Rate
			Subscribers Netted

Source: Information provided by the Wyoming Office of Tourism.

### **Independent Contractors**

In addition to macro- and micro-analysis, the Office uses several independent contractors to gather and/or conduct research relevant to the tourism industry. Table 1, on the next page, identifies examples of these contractors and associated studies.

**Table 1. Selected Examples of Independent Contractors and Studies Used by the Office**

<b>Contractor</b>	<b>Study</b>	<b>Used for</b>
Dean Runyan & Associates	Wyoming Travel Impact	Annually provides detailed findings related to the health of the travel and tourism industry in Wyoming. Reports total visitors to the State and the economic impact of travel, including spending, jobs, earnings and taxes.
Strategic Marketing and Research Insights (SMARI)	Wyoming Advertising Effectiveness	Annually provides detailed findings related to annual campaign performance, focused on the Office's ability to influence travel to Wyoming. Study also determines ROI of advertising efforts and offers recommendations for future planning successes.
Smith Travel Research (STR)	Destination Report of Hotel Data	Monthly report provides aggregate hotel data on the state and county level, which allows the Office to monitor health of the hotel industry and allows forecasting of the future travel season. This allows the Office to adjust as needed.
Destination Analysts, Inc.	Office Travelers Journal (OTJ) Survey of Journal Requesters	Annual report focused on the usage of publication in the traveler planning and decision-making process; content evaluation; user content preferences; and visitor planning behaviors prior to Wyoming trips.
Arrivalist	Arrival Sampling	The Office annually purchases anonymous cellular geo-tracking data that monitors exposure to the Office's digital outreach and arrival of visitors into the State through a 30% sampling. Also identifies how visitors move around once in the State. Helps determine arrival, optimizing media performance, and monitor the types visitors to Wyoming.
Destination Analytics, Inc.	TravelWyoming.com Website User & Conversion Study	On-going study focused on determining the ROI for Destination Marketing Organizations (DMO) for the work, time, and resources that go into keeping a travel website up-to-date.

Source: LSO selected examples from information provided by the Wyoming Office of Tourism.

### **Balanced Score Cards**

The Office prepares balanced score cards based off its objectives and goals identified in its strategic plans. Below is the most recent balanced score card.

**Figure 4. Office of Tourism Balanced Score Card – 2016 (FY17) (Year 1 of 2 Year Plan)**

<b>Imperatives</b>	<b>Objectives</b>	<b>Status</b>	<b>Initiatives</b>
<b>Grow Wyoming's Visitor Economy</b>	Increase Economic Impact Direct Spend by 10% Increase tourism-related tax ROI by 15% (from media buy)	-2% 36%	Advance research capabilities to provide intelligence to WOT leadership (and partners) to drive ongoing strategy Grow length of stay Grow visitation during shoulder seasons
<b>Maximize the Impact of our Partnerships</b>	Grow industry partner engagement with WOT programs by 10%	37%	Ongoing outreach and guidance to enhance partner engagement with WOT programs and opportunities Ensure program opportunities continue to deliver return on partner investment
<b>Champion the Destination and the Brand</b>	Increase y/y inquiries by 15% Increase consumer awareness by 8%	2% -3%	Strengthen Wyoming's brand reach through strategic partnerships Own Wyoming's competitive advantages Strategically grow successful domestic and international markets Implement strategies to integrate the brand throughout trip planning life cycle
<b>Ensure Organizational Excellence</b>	Meet and exceed all measurable objectives defined on the Balanced Score Card Ensure a successful financial audit	57% √	Cultivate a work environment that inspires collaboration and leadership principles among all team members to deepen engagement Foster a shared value of continuous improvement throughout the organization

Source: Graphic provided by the Wyoming Office of Tourism.

### **Return on Investment (ROI)**

The Office contracts with Strategic Marketing & Research Insights, LLC to annually conduct the Advertising Effectiveness and ROI study, to determine the influence advertising campaigns had on visitors coming to Wyoming. The study examines the difference between visitors considered “base travel,” meaning they would have come to Wyoming regardless of the advertising campaign, and travelers that would not likely come to Wyoming but were influenced by the advertising campaign. The difference is considered “incremental,” meaning the measurable impact of destination marketing on travel plans.

The table below illustrates the campaign economic impact from 2015, 2016, and 2017 as determined by annual Advertising Effectiveness and ROI studies.

**Table 2. Campaign Economic Impact**

<b>Area</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>
Total Influenced Trips <sup>1</sup>	850,412	931,809	1,011,635
Influenced Visitor Spending	\$1,164,213,985	\$1,203,379,006	\$1,130,804,604
Campaign Budget	\$5,754,175	\$4,375,457	\$4,399,337
ROI	\$202	\$275	\$257
Taxes generated	\$47,732,773	\$49,338,539	\$45,232,184
Tax ROI	\$8.30	\$11.28	\$10.28

Source: Legislative Service Office table based on data provided by the Wyoming Office of Tourism.

<sup>1</sup> Average 3.5 people/trip.

The Office measures all travel on Wyoming's economy. The figure below depicts the impact of travel specifically resulting from the advertising campaign, in relation to all travel, e.g. leisure, business, convention, sports, etc.

**Figure 5. Impact of Travel Attributed to the Advertising Campaign**

2017 Results	Incremental travel directly attributed to advertising campaign (Source: SMARI)	Aggregate of all travel (Source: Dean Runyan & Assoc.)	Incremental travel in relation to all travel
Visitor Volume	3,945,377	8,747,000	45.1%
Visitor Spend	\$1,166,132,532	\$3,571,000,000	32.7%
Taxes Generated	\$45,232,184	\$188,000,000	24.1%
Travel Party Trips	1,011,635	3,524,333	28.7%
Travel Party Size	3.9	2.4	59.3%
Length of Stay	3.3	2.8	17.9%

Source: Information provided by the Wyoming Office of Tourism.

## Potential Sources of Funding

Currently, the Office is funded using only General Fund appropriations. As shown in Figure 6, below, there are 14 other states that fund state tourism efforts with 100% general funds. Also shown in Figure 6 are the other funding mechanism states have chosen to support tourism promotion.

**Figure 6. Funding Mechanisms for all 50 state tourism offices**

Funding mechanisms for all 50 state tourism offices			
100% GF 15 states	Lodging Tax 13 states	NAICS* 5 states	Other 17 states
GA	AL - 5% mtn lakes; 4%	AR - 2%	AK - was GF; propose TID
IN	DE - 1% of 8%	ME - 5% of 8% rest; 9% lodg	AZ - tribal gaming; hotel + rental car tax + GF
MD	HI - 9.25%	MO - 17 NAICS	CA - assessment on gross sales > \$1 mill
MA	ID - 2% (50% grants)	OH - similar to MO	CO - gaming + GF
MN	IL - 6%	UT - similar to MO	CT - hotel tax + GF
MS	KY - 1%		FL - rental car tax + GF
NH	MT - 4% (65%)		IA - gaming + GF
NY	NE - 1%		KS - gaming + ad sales
ND	NV - 3/8 of 1% (5/8 local)		LA - .03% S/U tax (special district to levy)
PA	NJ - 7% (\$12 million min)		MI - tobacco settlement
SC	OR - 1.8% (1.5% in 2020)		NM - GF (75%) + ad sales
TN	RI - 5%		NC - 501 c (3) contract w/ Dept of Commerce
VT	TX - 6%		OK - S+U Tax + GF for salaries/benefits
VA			SD - gaming (40% to tourism) + 1.5% NAICS
WY			WA - was GF; propose TID
			WV - lottery
			WI - tribal gaming + 5% car rental tax

Source: LSO reproduction of information provided by the Wyoming Office of Tourism.

\* NAICS – North American Industrial Classification System

## Recent Legislative Interest in Office Funding

Funding sources for the Office was a topic discussed by the Joint Revenue Committee at its September 2017 meeting, and is Priority #6 of the Committee's

2018 Interim Topics list approved by Management Council. Funding sources discussed at the September 2017 meeting included a lodging tax and a 1% tax on hospitality and tourism industry North American Industry Classification System (NAICS) 7000 series codes. These codes include industries such as amusement parks, gambling, RV parks and recreational camps, rooming and boarding houses, food services, and drinking establishments, among others. Testimony provided at the Committee meeting by Department of Revenue suggested a 1% tax on 7000 series NAICS codes could generate approximately \$6.4 million annually.

## Collaboration with Local Tourism Industries

According to officials, the Office collaborates with tourism industry leaders in all 23 Wyoming counties through its Strategic Partnerships department. The Office offers a variety of ways through which local tourism industry leaders may promote their region. Examples of these opportunities include:

- Free business listings on [www.travelwyoming.com](http://www.travelwyoming.com) and in the Official Travelers Journal, with option for additional listings for a fee.
- Paid marketing co-ops provide cities, towns, counties, municipalities, and state agencies the opportunity to leverage the Office's marketing efforts for increased visibility. For example, co-op opportunities have included broadcast and digital radio, social media, and traditional print.
- Grant funds for technical assistance to support multiple projects statewide including translated guides, websites, videos, way-finding signage, consultant work to improve local tourism, marketing research, etc.

## Tourism Best Practices Models and Alternatives

According to the Office, the “collective intelligence” of top destination marketing organizations (DMOs) and trade associations is used to assist shaping a marketing strategy and campaign. DMOs are public organizations focused on increasing travel and its associated benefits.

The Office commented that “marketing is about getting the right message to the right people at the right time.” As such, the fundamentals of marketing are the same whether promoting a destination or a consumer product. Consumers must be influenced to buy a product or select a vacation destination. The Office notes the following as essential to the planning and development of a strategy:

- ***Overnight Visitor Profiles*** help the Office to better understand the travel behaviors and interests in Wyoming, as well as assist with fine-tuning market focus, and the types of travelers who stay longer and spend more.
- ***Consumer Testing*** includes determining the effectiveness of the media branding, creative, and messaging at encouraging travelers to come to Wyoming for vacation.
- ***Competitive Positioning*** is the monitoring of other states and their marketing methods, and the efficiency of influencing visitors to travel to

their destination. Wyoming does work collaboratively with other states to promote visitors to travel to the region. See other states discussion below.

- ***Market Research Index*** involves an independent contractor employing a market model targeting markets with high efficiency and marketing potential. It also allows the Office to focus brand and destination messaging on markets with high potential for travel to Wyoming.
- ***Google Analytics*** is a tool for website activities, assists the Office by tracking and measuring visitors to the webpage, as well as visits to specific attractions, locations, or content available on TravelWyoming.com.

### **Campaign Development**

The Office identified four firms with which it contracts to provide certain services to assist with campaign development in the State. These services include:

- Concept and execute an effective brand campaign, which includes production of ads, and negotiation and purchase of all paid media on behalf of the Office.
- Develop and implement an integrated media and public relations program, including media outreach in targeted markets, among other responsibilities.
- Provide hosting, maintenance, development, and digital content optimization for TravelWyoming.com.
- Design and print the annual visitors guide, and distribution of 400,000 visitor guides annually to highly qualified consumers.
- Manage the cooperative marketing effort for Wyoming, North Dakota, Montana, South Dakota, and Idaho, and allows for co-op representation at a fraction of the cost in primary international markets, i.e. United Kingdom, Germany, France, Italy, Benelux (Belgium, Netherlands, and Luxembourg), Nordic Countries (Norway, Sweden, and Denmark), and Australia.

As noted by the Office, all tourism promotion campaigns follow a common methodology:

1. Identify unique values and assets of the destination;
2. Identify consumer segments that share the same values and have the highest propensity to travel to the destination;
3. Develop compelling creative work (e.g. ads, video content, etc.);
4. Execute multi-layered media approach to reach potential consumers at various stages of the trip planning lifecycle. Whether a domestic or international campaign, all tourism marketing organizations follow a similar model in acquiring and converting potential travelers to their destinations.

According to the Office, there is no alternative model for tourism promotion.

## Other States Comparisons

Although the fundamentals of marketing do not vary, and campaigns follow a common methodology, there are still some differences in tourism promotion between Wyoming and other states.

The Office provided information from the US Travel Association, which conducts a Budget Survey of all state tourism offices to determine levels of funding for tourism. The table below represents the results from 48 responses to the 2016-2017 budget survey. The Office pointed out that for FY2016, Wyoming ranked 29<sup>th</sup>, but ranked 31<sup>st</sup> in FY2017.

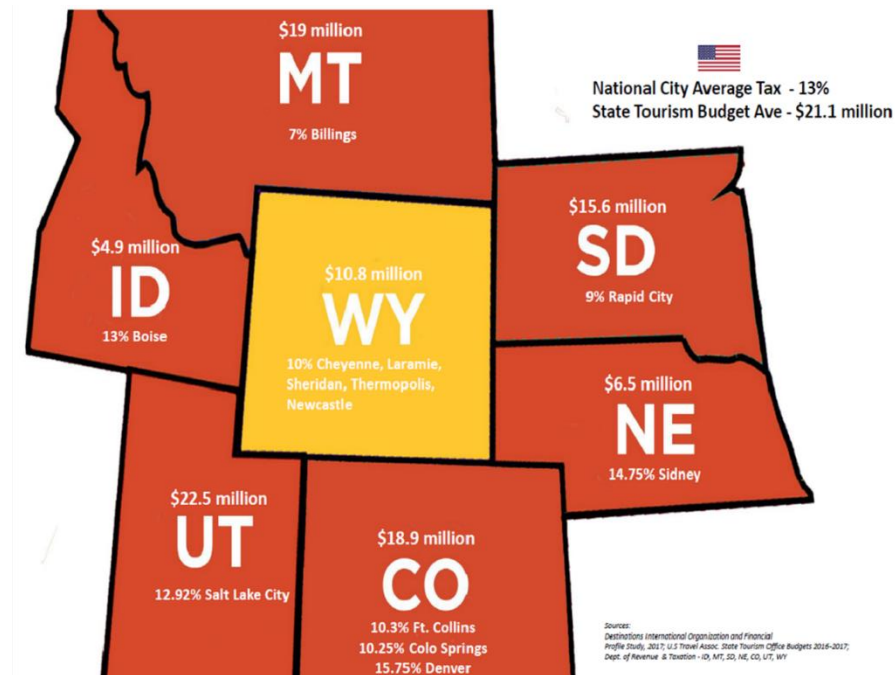
**Figure 7. 2016-2017 Tourism Budgets Across the United States.**

Rank	State	Total Budget	Rank	State	Total Budget
1	California	\$117,331,184	25	New Mexico	\$12,815,807
2	Hawaii	\$87,298,000	26	Kentucky	\$12,307,800
3	Florida	\$86,006,900	27	Maryland	\$12,251,535
4	New York	\$60,000,000	28	North Carolina	\$12,050,042
5	Illinois	\$52,757,963	29	Oklahoma	\$11,737,399
6	Texas	\$42,500,000	30	Pennsylvania	\$11,474,142
7	Michigan	\$34,000,000	31	Wyoming	\$10,862,514
8	Oregon	\$32,139,400	32	West Virginia	\$10,502,222
9	Utah	\$22,511,630	33	Ohio	\$10,000,000
10	Arizona	\$22,075,377	34	New Jersey	\$9,000,000
11	Tennessee	\$21,762,258	35	Georgia	\$7,443,293
12	Missouri	\$19,478,614	36	Indiana	\$6,739,950
13	Montana	\$19,029,275	37	Nebraska	\$6,567,219
14	Colorado	\$18,900,000	38	Connecticut	\$6,435,000
15	Virginia	\$18,153,646	39	Mississippi	\$5,491,528
16	Nevada	\$16,872,344	40	North Dakota	\$5,165,748
17	Arkansas	\$16,858,430	41	Idaho	\$4,967,700
18	Louisiana	\$16,804,510	42	Iowa	\$4,375,820
19	Wisconsin	\$15,711,200	43	Kansas	\$4,050,174
20	South Dakota	\$15,600,000	44	Massachusetts	\$3,258,000
21	South Carolina	\$15,211,931	45	Vermont	\$3,174,386
22	Minnesota	\$14,568,235	46	Delaware	\$2,316,800
23	Alabama	\$13,475,000	47	Alaska	\$2,233,000
24	Maine	\$13,450,260	48	Washington	\$234,472

Source: Information provided by the Wyoming Office of Tourism.

Additionally, the Office provided a regional comparison, see Figure 8, below, of 2016-2017 marketing budgets and accommodations taxes, which was provided to the Wyoming Legislature's Management Council during the 2018 Legislative Session.

**Figure. 8 State Tourism Office 2016-2017 Budgets, Total Tax on Accommodations<sup>2</sup>**



Source: Graphic provided by the Wyoming Office of Tourism.

### **Regional Efforts**

The Office works collaboratively with other states to bring more visitors to the region. Specifically, the Office stated strong relationships exist with Idaho, Utah, Montana, Colorado, South Dakota, and North Dakota. The Office has participated in multiple regional tourism promotion efforts, primarily focused on international development. A few of these efforts include:

- Five state (Idaho, Montana, North Dakota, South Dakota, and Wyoming) European marketing consortium
- Two state (South Dakota and Wyoming) Japanese marketing co-operative
- Greater Yellowstone initiatives among Idaho, Montana, and Wyoming
- Thirteen western states collaboration on industry issues and policies through the Western States Tourism Policy Council (WSTPC)

The Office monitors its “competitive set,” meaning the states Wyoming competes with for visitors. The current “competitive set” includes Montana, Utah, Colorado, and South Dakota. The Office identifies and uses these states’ key performance indicators (KPIs) to set benchmarks and target shared goals.

<sup>2</sup> In Figure 8, the Wyoming text is difficult to read. For purposes of clarity, in 2016-2017, the Office budget was \$10.8 million, and total tax on accommodations was 10% in Cheyenne, Laramie, Sheridan, Thermopolis, and Newcastle.

## **The Office Sunset**

Although the Office noted in relation to a sunset provision, it is deferential to “industry, constituents, and their elected officials,” benefits of tourism to the State was also addressed. “By definition, the visitor economy is an export economy. The benefits from a thriving visitor economy provide much needed tax revenues to fund many public services. In addition to increased Sales & Use Tax, travelers account for nearly one-third of all motor fuels tax collections in Wyoming. It has also been determined (thru [sic] independent research) the halo effect from tourism advertising enhances other benchmarks for traditional economic development.”

## **Potential Evaluation Scope**

If the Committee decides to move forward with a full evaluation of Wyoming Office of Tourism, the scope of the evaluation could include the following areas:

1. A review the Wyoming Office of Tourism, past and present, Balance Score Cards. Of particular interest would be the areas where the Office appears to have negative percentages including: partner investments, brand awareness, and direct spend.
2. A review of national best practices to Wyoming practices in specific areas.
3. A review of the current organizational structure to determine if the Board/Office is the most appropriate/effective way to promote tourism activities.

## Appendix A

Figure 1. “Find Yourself in Wyoming” campaign image

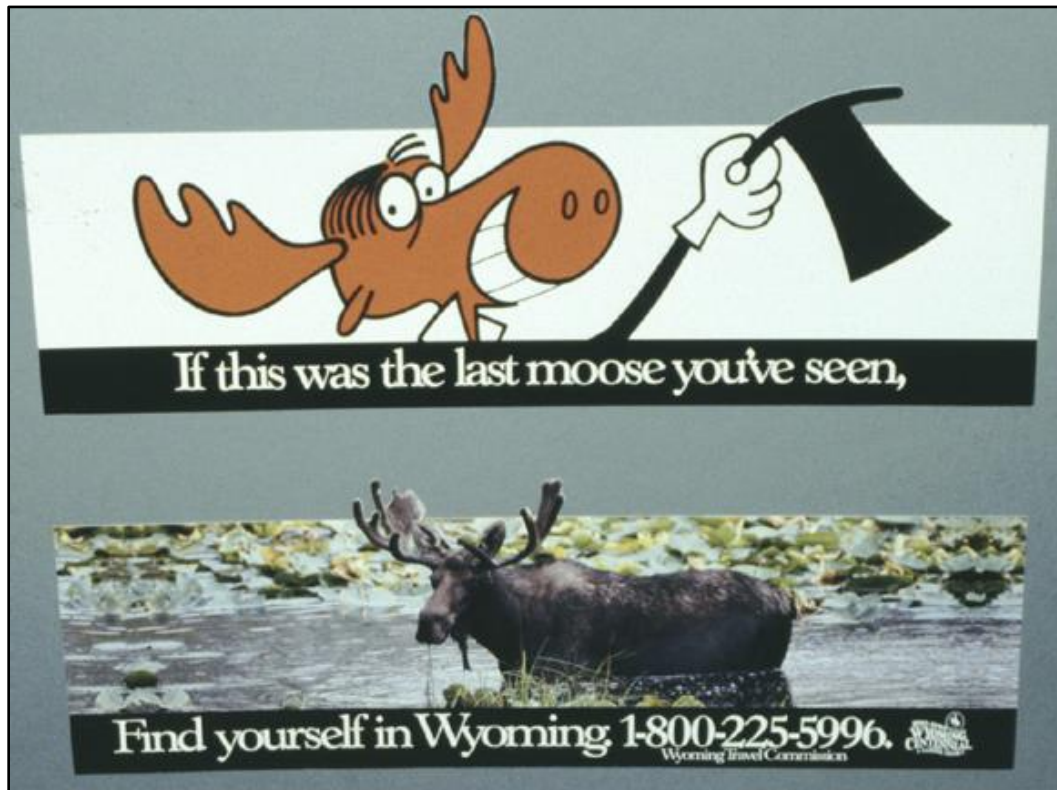


Figure 2. “Retro” campaign images

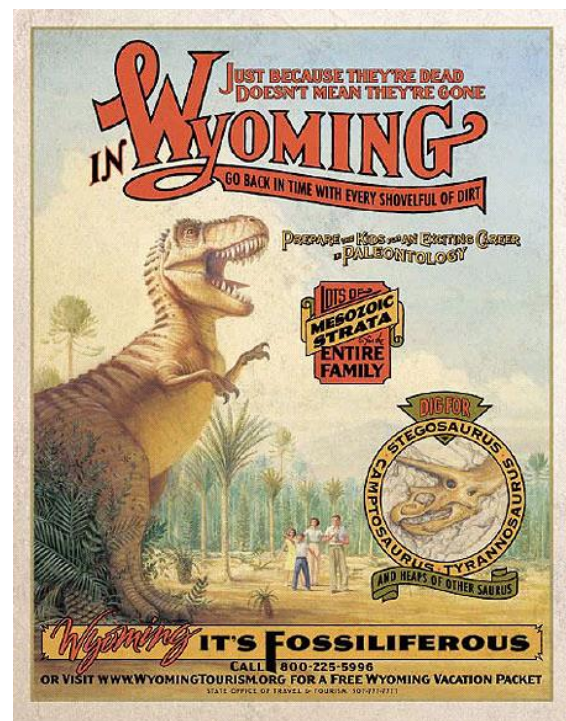
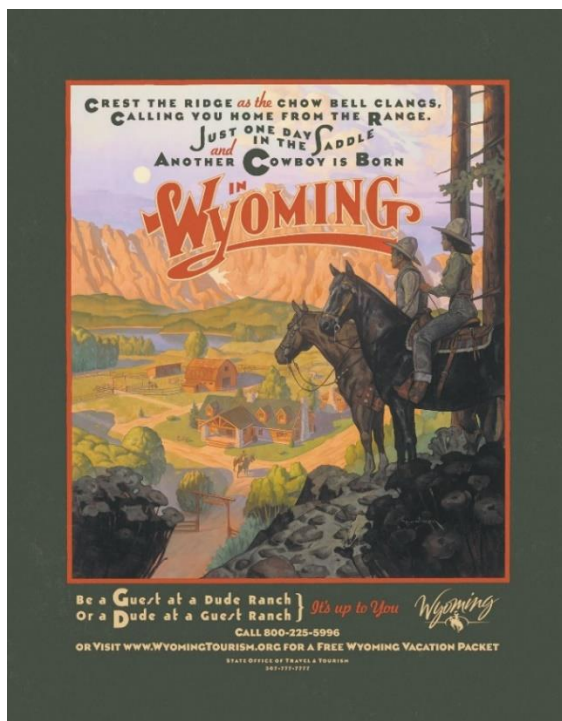


Figure 3. “Shadow Box” campaign images



Figure 4. “Forever West -Reflections” campaign images





Figure 5. “Forever West – Roam Free” campaign images



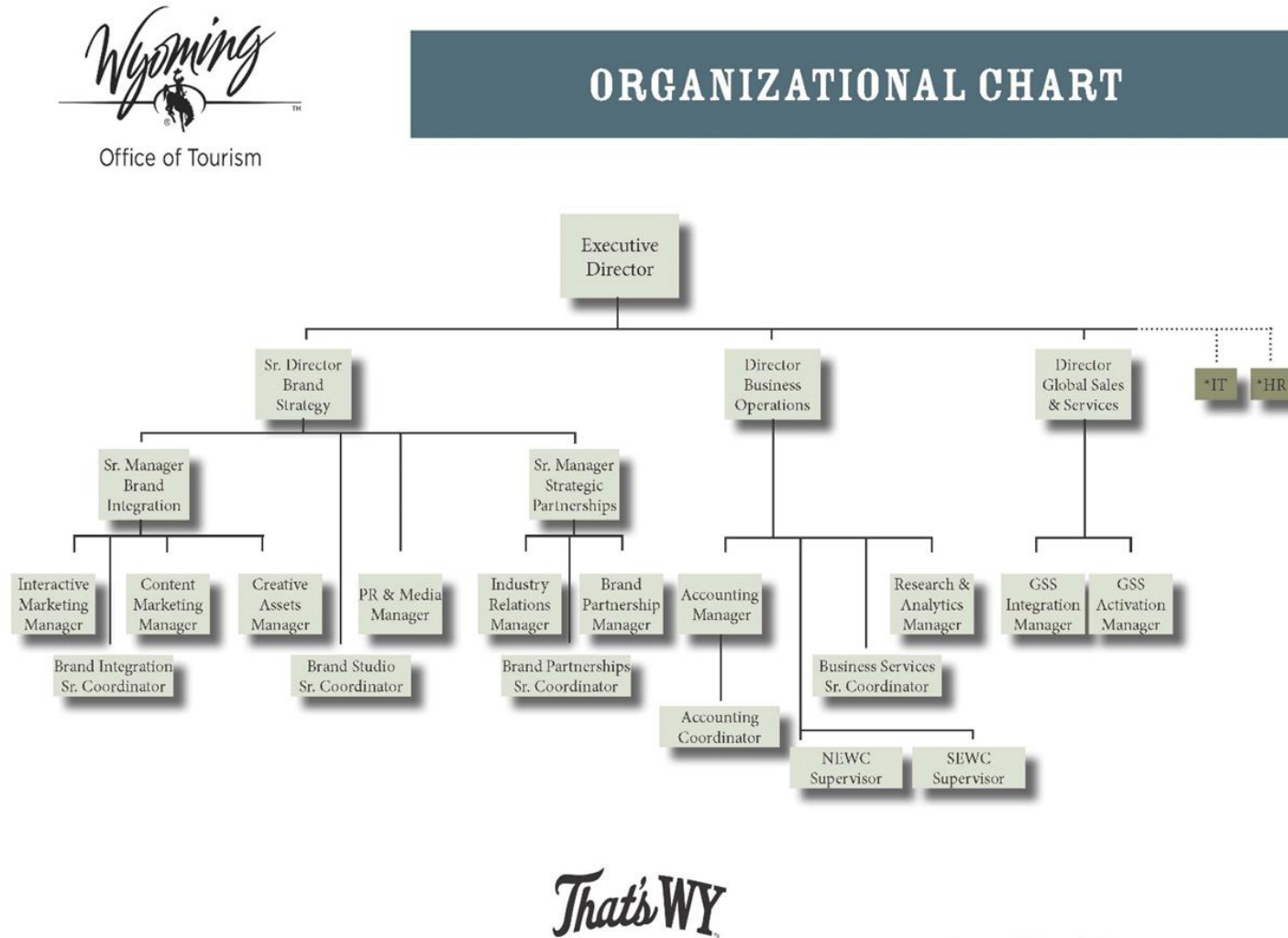
Figure 6. “That’s WY” current campaign images



Source: All image provided by the Wyoming Office of Tourism.

## Appendix B

### Current Wyoming Office of Tourism Organizational Chart



\* Contract MOU with Wyoming Business Council

Source: Figure provided by the Wyoming Office of Tourism.

## Appendix C

### Wyoming Office of Tourism Biennium Budget Comparisons – Appropriated Funds (100% GF)

#### Biennium Budget Comparisons - Appropriated Funds (100% GF)

#### Wyoming Office of Tourism - Agency 066

BFY 03-04	BFY 05-06	BFY 07-08	BFY 09-10	BFY 11-12	BFY 13-14	BFY 15-16	BFY17-18	BFY 19-20	
\$11,292,417	\$11,465,423	\$14,194,528	\$23,107,834	\$24,591,372	\$25,315,686	\$24,593,739	\$24,912,702	\$25,332,748	Standard
	\$2,205,600	\$8,294,000	\$2,244,991	\$305,870	\$300,000	\$659,960	\$4,400,000	\$20,000	Exceptions
	\$2,534,000	\$100,000	\$1,002,000	\$1,350,000	\$3,160,000	\$4,828,000	\$2,000,000	\$0	One-time
\$11,292,417	\$16,205,023	\$22,588,528	\$26,354,825	\$26,247,242	\$28,775,686	\$30,081,699	\$31,312,702	\$25,352,748	Total Appropriation
			(\$2,070,293)		(\$964,000)	(\$590,000)	(\$3,977,152)	(\$223,358)	Budget Reductions
\$11,292,417	\$16,205,023	\$22,588,528	\$24,284,532	\$26,247,242	\$27,811,686	\$29,491,699	\$27,335,550	\$25,129,390	Adjusted (less reduction)
		\$10,000,000	\$2,112,772	\$14,598,000					Capital Construction

Source: Figure provided by the Wyoming Office of Tourism