

Wyoming Office of Tourism

Diane Shober, Executive Director





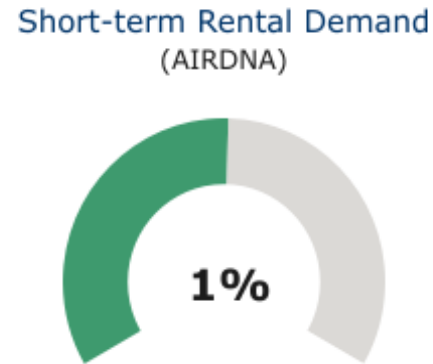
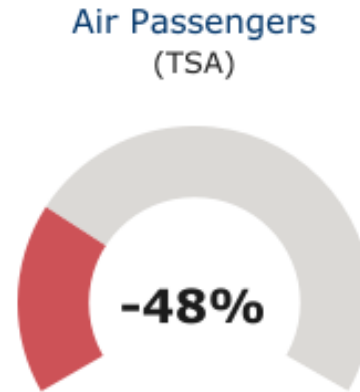
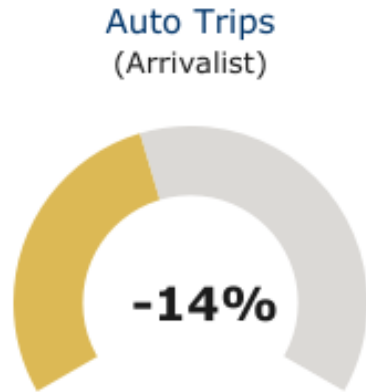
“The Wyoming Office of Tourism is responsible for promoting our state as an attractive travel destination and enhancing its public image as a dynamic place to live and work. Through the impact of travel, we strengthen the economic position and provide opportunity for the people in our local communities.”





US – Road to recovery travel indicators.

United States, March 2021 % change relative to same month in 2019



Source:
Tourism Economics





Travel is essential to recovery. Pent-up demand and wide-open spaces contribute to strong intent to travel.

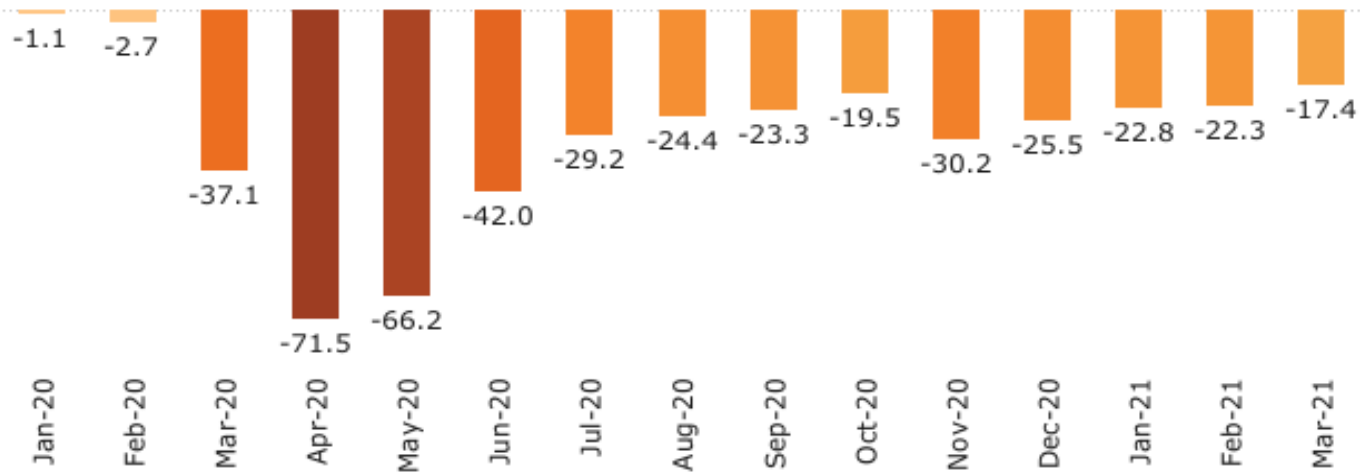
- **83.5% of American travelers have tentative plans to travel in 2021**, of which half expect to be comfortable at outdoor venues and attractions by July. (Destination Analysts, Coronavirus Traveler Sentiment Study Wave 50, February 22, 2021)
- Seen as key to travel, the vaccine has caused travel optimism to pick up, with **half of travelers willing to vaccinate for travel clearance**. (BVK, COVID-19 Updates and Insights, Jan 25th, 2021)
- Top trip characteristics include enjoying scenic beauty (60%), outdoor warm weather activities (58%), and **visit to national parks and take road trips tied (54%)**. (BVK, COVID-19 Updates and Insights, Jan 25th, 2021)
- Historically, automobile travelers have outnumbered air travelers 5 to 1. Given the perceived safety during the pandemic, auto travel expanded further to outnumber air travel 8 to 1. This gap to widen further in 2021. (OmniTrak, Compass Vol. 1, Feb. 2021)
- **Business/corporate travel will begin to slowly recover in Q4**. International is also expected to be a slow recovery, but destinations can fill the gap with domestic travelers who would have traveled internationally otherwise. (Tourism Economics; TTRA: “What will 2021 Bring?” January 28, 2021)





WY – Road to recovery travel indicators.

Travel Spending (% change vs. 2019) Wyoming



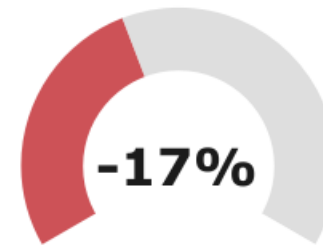
Travel Spending (% change vs. 2019)

Cumulative Losses Since January 2020 Wyoming, through March 2021

	Wyoming
Travel Spending (difference)	(\$1.4B)
Federal Taxes	(\$71M)
State Taxes	(\$27M)
Local Taxes	(\$16M)

Travel Spending

Wyoming
March 2021, % change vs. 2019





The U.S. travel industry contracted 36% in 2020, whereas Wyoming's travel economy declined only 23%.

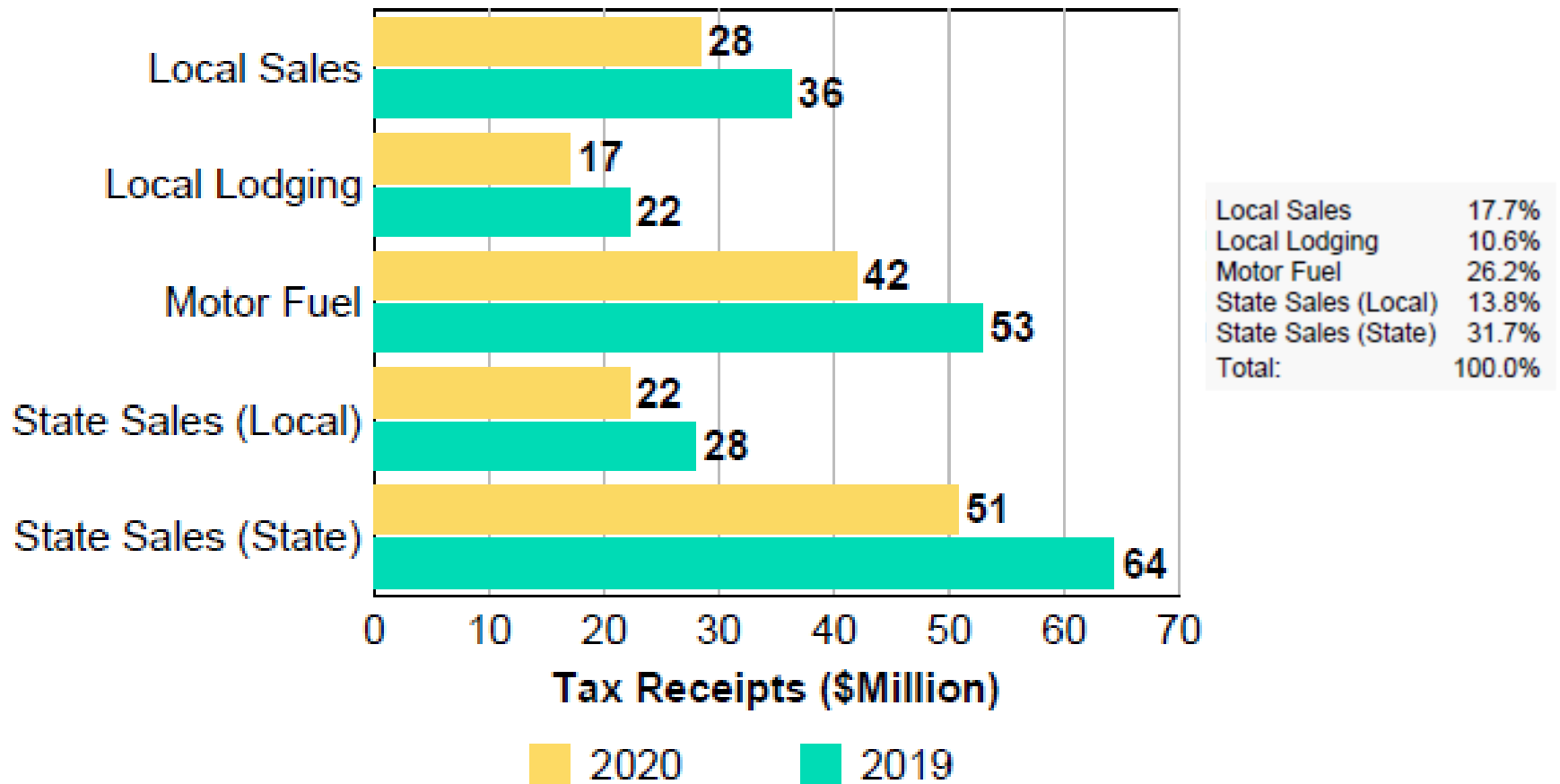
- **Overnight visitor volume decreased by 25.7%** from 9.3 million person trips to 6.9 million person trips.
- **Travel Spending declined 25.8%** from \$3.96 billion in 2019 to \$3.0 billion.
- **Tax receipts generated by travel spending are down 21.4%** compared to 2019. Local and state taxes have declined 21.8% and 21% respectively.
- **Direct employment experienced a loss of approximately 4,000 jobs** across the state. This represents a 18.5% decline in travel employment. The largest amount of job losses occurred within accommodations and food services sector, which lost 2,900 travel generated jobs.

Source:
Dean Runyan Associates





Tax Receipts Directly Generated by Travel Spending



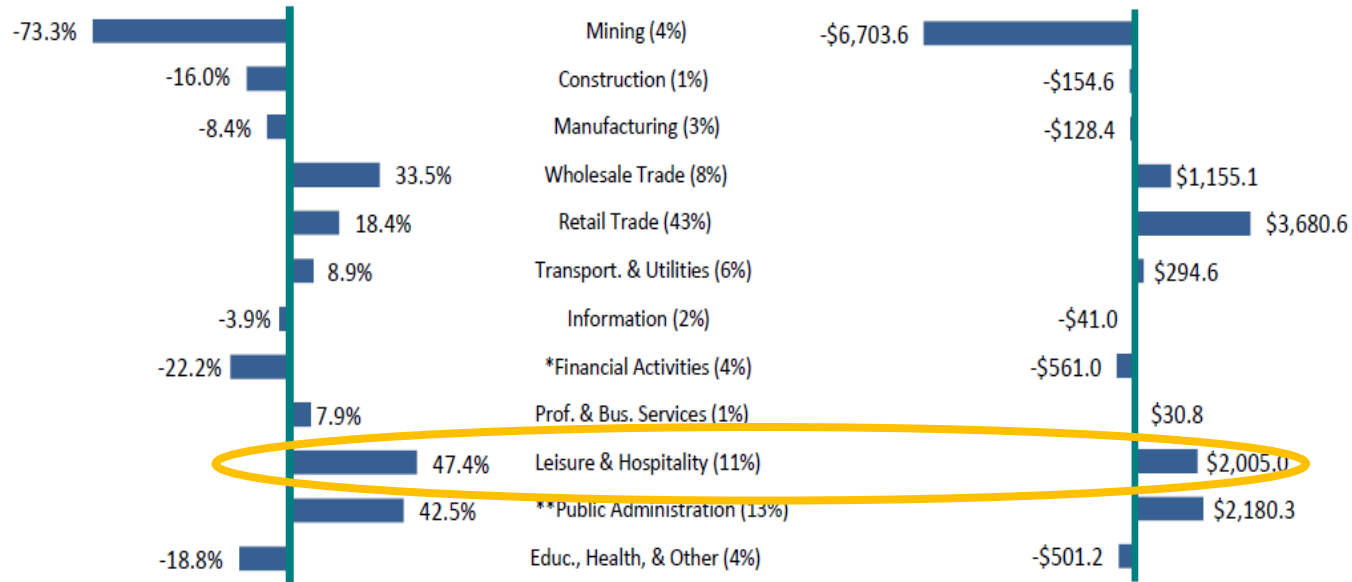


Wyoming Insight

WYOGOV

ECONOMIC ANALYSIS DIVISION • APRIL 2021

► State & local shares of 4% sales and use tax collections.⁷ [Change by Industry Sector: Apr 2021 vs. Apr 2020 by percent and dollars (in thousands)]



►► In a year-over-year comparison (April 2021 vs. April 2020), the mining sector reported the largest declines in collections, down \$6.7 million or 73.3%. The retail trade sector saw the largest increase in collections, up \$3.7 million or 18.4% compared to last year.

Note: Value in parentheses represents share of total collections.

*Taxes are mostly from automotive, machinery, and equipment leasing and rental.

**Reflects taxes from automobile purchases.





Travel: Wyoming's unsung hero of jobs.

- Travelers to the state directly supported 28,630 Wyoming jobs, including 12,090 in other industries.
- Travel spending generated \$935.2 million in direct payroll, and an additional \$609.7 million in other industries.
- Travel and tourism supports 7.3% of total employment in Wyoming, or 1 in every 8 jobs.
- Leisure and Hospitality is the largest employer among all private industries in Wyoming.
- Without travel and tourism jobs, Wyoming's 2020 unemployment rate would have gone from 5.8% to 13.1%.
- Supports higher education
- Fast track to management

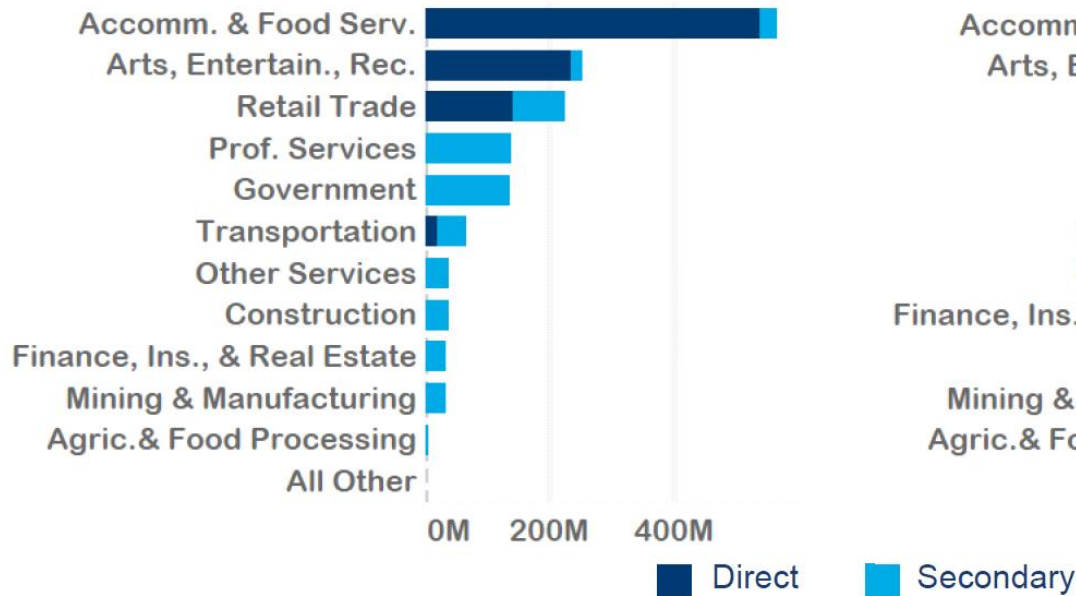




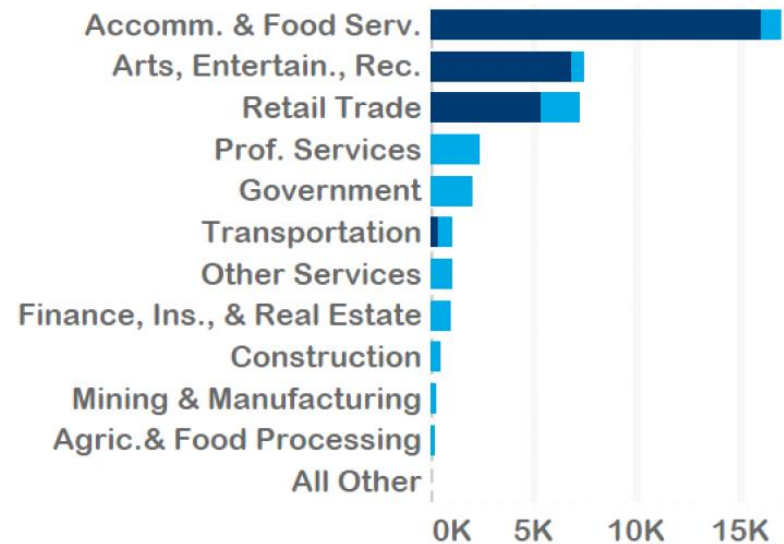
Travel: Wyoming's unsung hero of jobs.

Industry Breakout of Secondary Impacts

Direct and Secondary Earnings



Direct and Secondary Employment



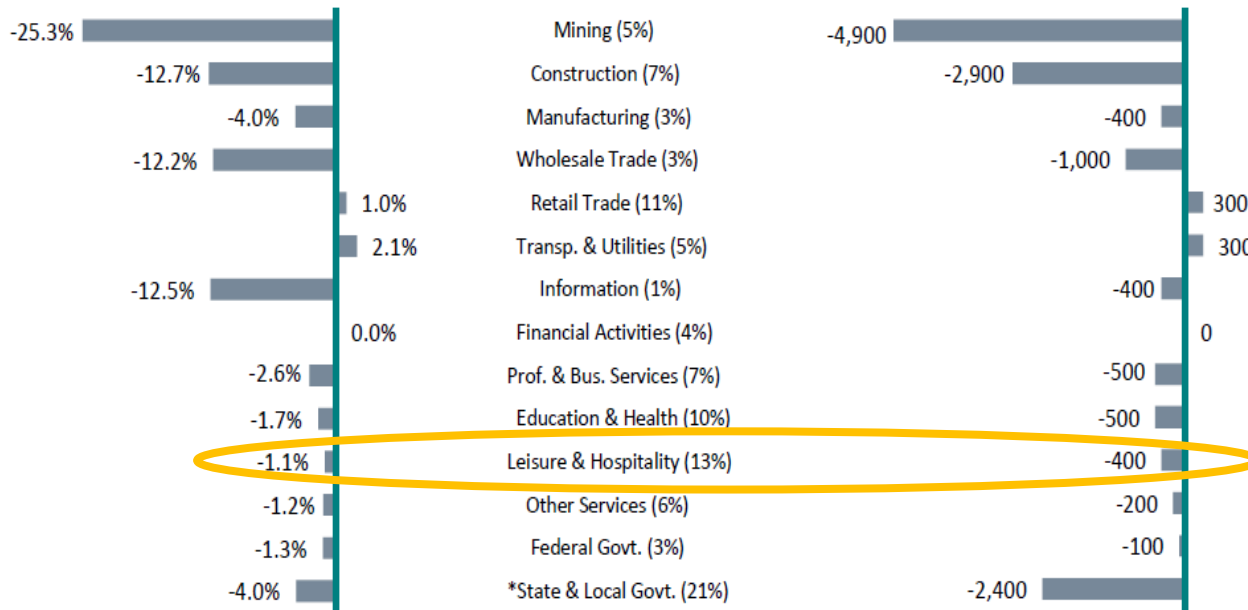


Wyoming Insight

WYOGOV

ECONOMIC ANALYSIS DIVISION • APRIL 2021

► Nonfarm wage and salary employment.⁸ [Change by Industry Sector: Mar 2021 vs. Mar 2020 by percent and jobs; seasonally adjusted]



► Wyoming had 274,800 jobs in March, 13,100 fewer compared to a year ago, a decrease of 4.6%. The mining industry saw the largest decline in jobs, down 4,900 jobs (-25.3%) relative to last year.

Note: Value in parentheses represents share of total jobs.

*Includes public education and hospitals.





That's
WY™



Media Activation Phases:	Safety & Assurance	Rebound	Rebound Extension	Recovery	"Normal"
Trigger	Cases in the U.S. start to increase. Social Distancing and Stay at Home orders go into effect	Cases stabilizing/decreasing Stay at Home Orders lifted for adjacent states	Cases stabilizing/decreasing Stay at Home Orders lifted for adjacent states	Stay at Home Orders lifted for majority of US No Travel Advisories Travel Happening – Flights, Bookings, Hotel Occupancy	Travel Happening at relatively pre-COVID19 levels
Estimated Timing	Mar 2020 – May 2020	June – September 2020	July – September 2020	March – September 2021	TBD
Budget	\$120K	\$1.2MM	\$1.885MM	\$4.6MM	TBD
What Defines This Phase	Awareness media types to core audiences	Start with most efficient intent-based media types	Complement Rebound strategy with emphasis on Road Trip routes and safe travel	Intent-based media types to complement Recovery strategy; emphasis on Road Trip and WY Responsibly; expanded to additional targeted digital tactics	Addition of tactics higher in the funnel for awareness
Markets	Regional states surrounding Wyoming; Denver, Salt Lake City and Billings DMAs prioritized	Drive Market: Denver, Salt Lake City, Billings, Bozeman, Rapid City, Sioux Falls, Omaha	Drive Markets + In State	National Regional Spot Market	Additional fly markets or resume national
Media Types	Paid Social Connected TV	Paid Search Paid Social Programmatic – Display, Native and Online Video	Audio Paid Search Paid Social Programmatic – Display, Native and Online Video Site Specific Trip Advisor	+Connected TV and/or Digital Audio +Site Specific +Digital Display +Paid Social +Paid Search	Same Media Types Scale Up
Audience Targeting	A25-54; where possible, reach a travel intender audience.	Solely intent-based	Intent-based audience planning trips + travelers in market	Adjusted core audiences New opportunity audiences	Core audiences
Degree of Flexibility	High	High	High	High	Low





Media Budget Summary

Winter 20-21

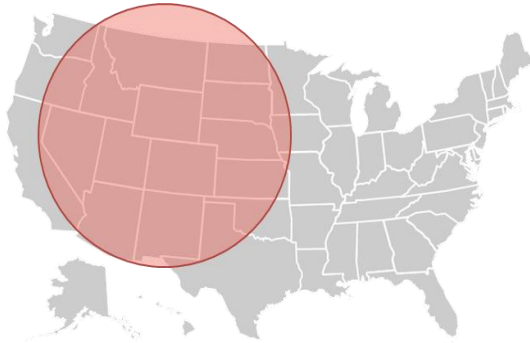
\$350,000

Summer 2021

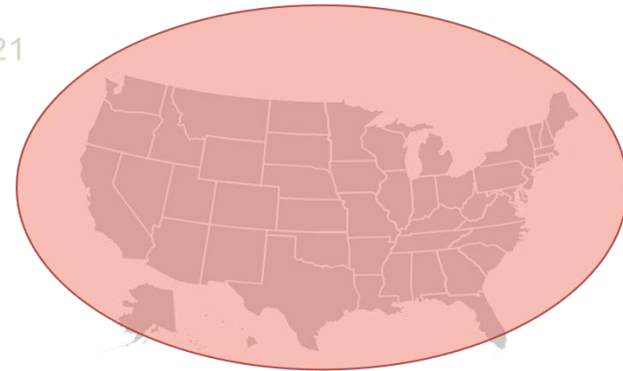
\$4,643,500

Geography

2020



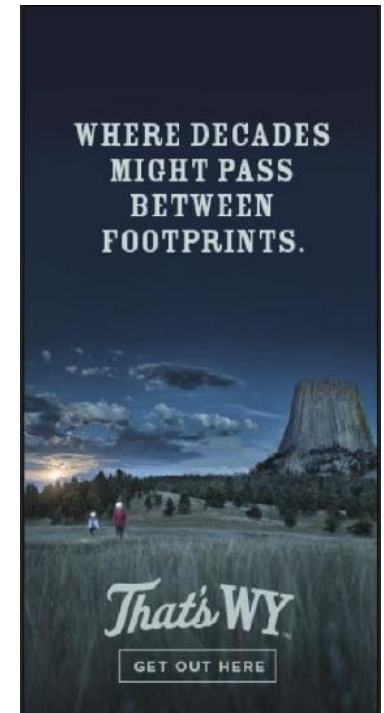
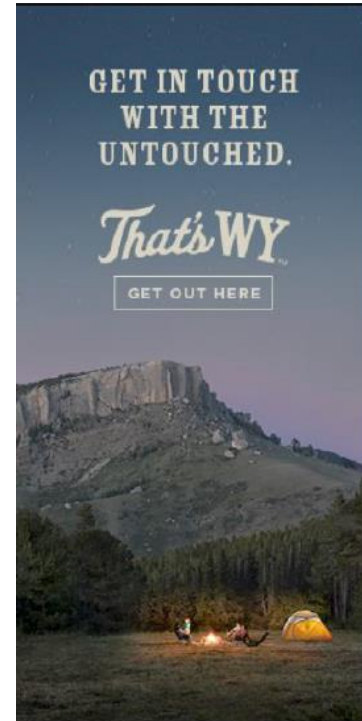
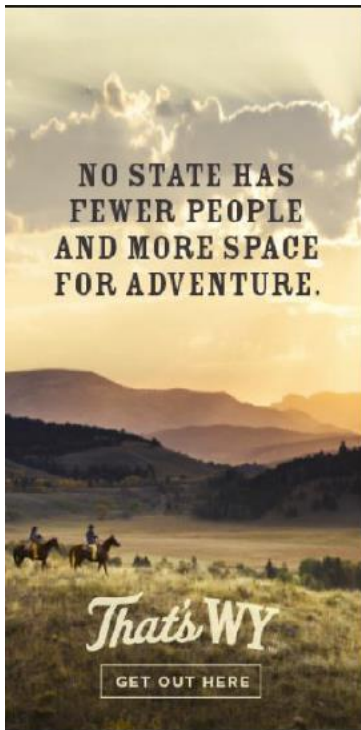
2021





Creative Overview

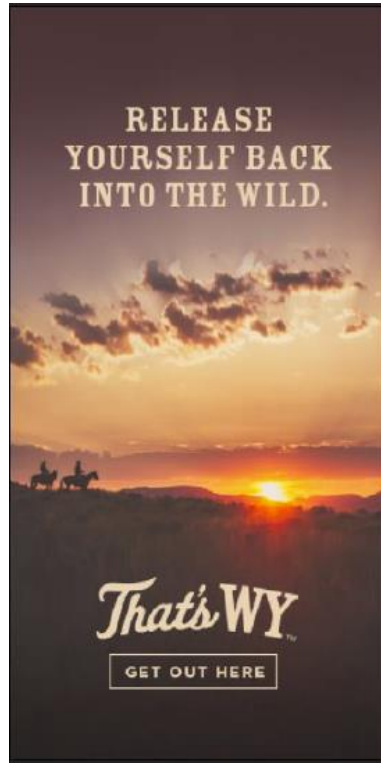
The overarching Brand Campaign work will continue to position Wyoming as the location for wide-open spaces filled with opportunities to seize adventure and find release.





Creative Overview, cont.

Western



Adventure



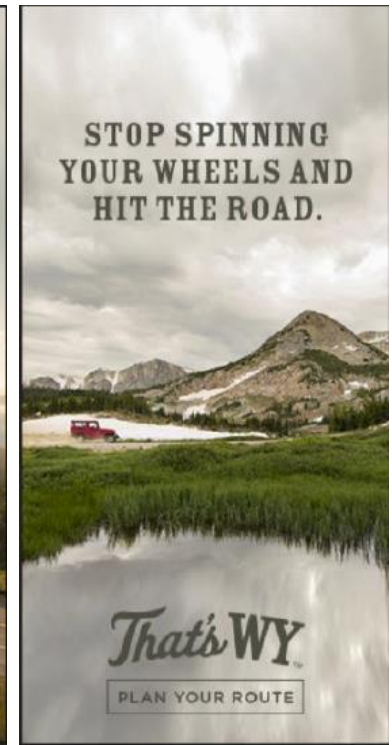


Creative Overview, cont.

WY Responsibly



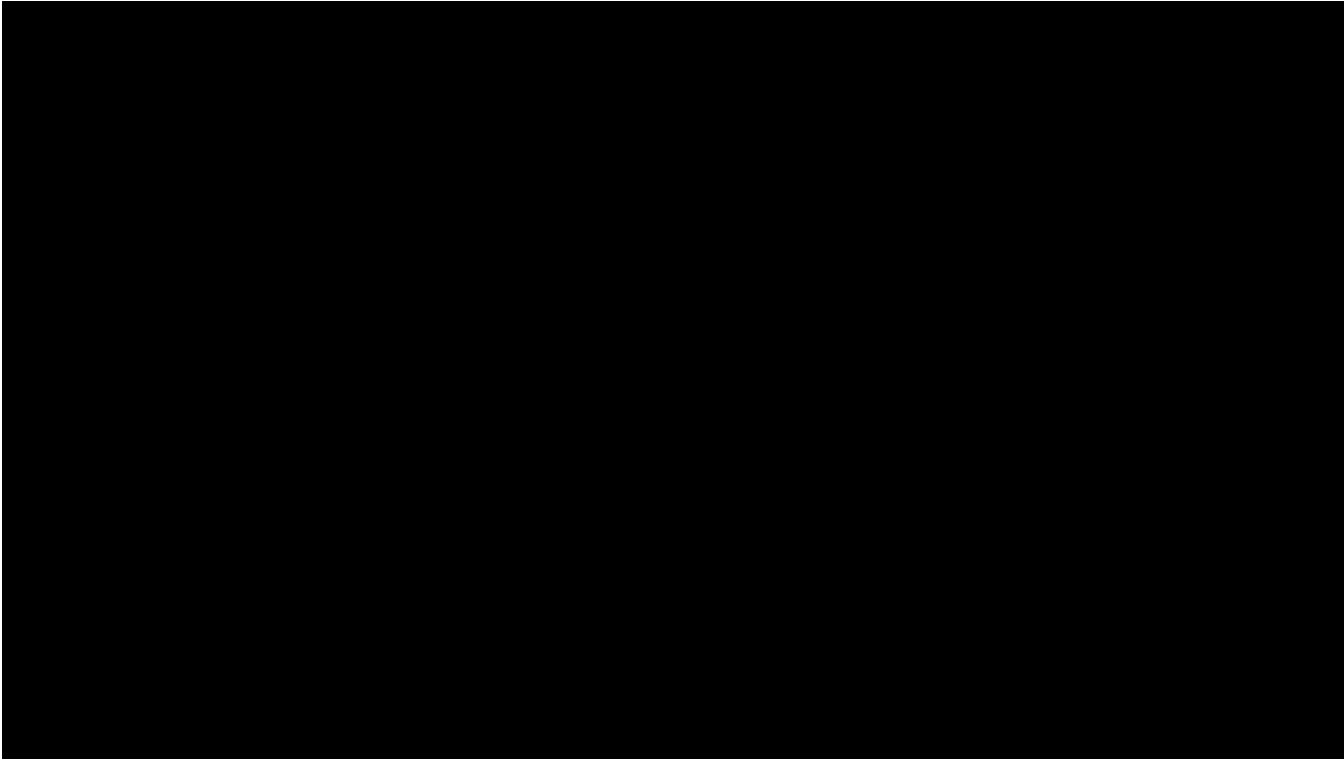
Road Trip





Radio and Video

:30 Digital Radio - Space





Road Trips



2021 CO-OP STRATEGY

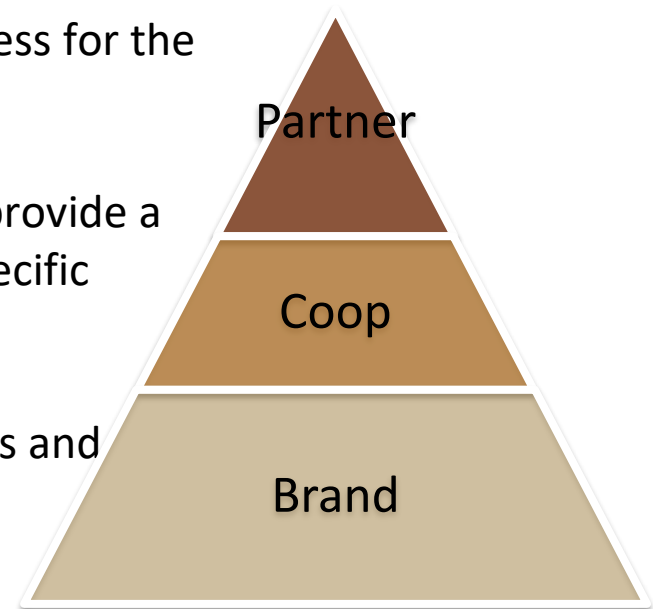


Increases collective buying power and share-of-voice in the market

WOT brand ads set the foundation for overall awareness for the destination

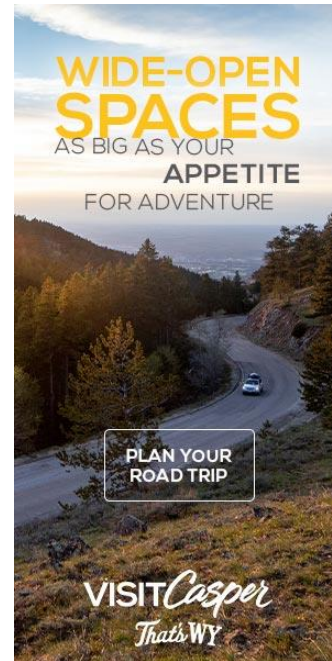
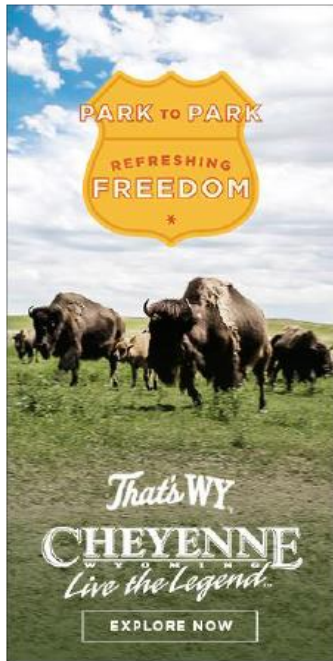
Co-op ads, designed with similar branding elements, provide a layered approach and sense of place by promoting specific destinations

Single business ads complete the funnel for consumers and capture direct bookings



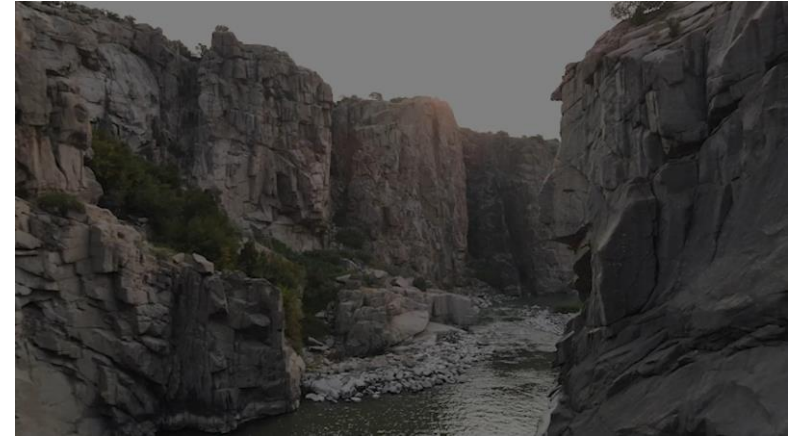


Maximizing the Impact of a Shared Partnership





Elevating Our Partners





Social Media



Wyoming Office of Tourism

Published by Sprout Social · April 27 at 6:48 PM

Chugwater isn't only known for its chill they also have the oldest operating old fashioned soda shop in Wyoming. #ThatsWY



18,802 People Reached

1,243 Engagements

Boost Post

292

15 Comments 79 Shares



visitwyoming



thejoyfulwyomingmama Looks like Fremont Canyon. Such a magnificent and beautiful place!

9w Reply



visit.casper One of our favorite places

9w 3 likes Reply



bchotspringer Wyoming is the



Liked by andyaustinphoto and others

MARCH 9



Add a comment...

Post



visitwyoming

Dubois, Wyoming



visitwyoming Wyoming is full of western hospitality that shines through in our local businesses and restaurants. Where is that favorite place you have to stop and grab a bite to eat or shop for that special something? #ThatsWY #307Day

@paulotakesphotos

@cowboycafewyo

10w



vhaystue

slice of p

9w Reply



10,229



MARCH 4



Add a com





WY Responsibly

Mindful travel is a mission and values that resonates with travelers now more than ever. Wyoming is uniquely positioned to be the voice behind this global and essential message. #WYResponsibly



©2020 - WY Responsibly

WY RESPONSIBLY.

Together, we can keep Wyoming wild and free.

At the best produced state and the best spots for adventure, we recognize the responsibility and mindful choices to our land, history, culture and communities. We invite you to come and see the beauty, responsibly, with these important tips.

Source: [WY Responsibly](#) & [Wyoming](#), [Adventure](#) & [Travel](#).



Adventure & Camping - Tips on campsites, reservations and general camping rules, safety and precautions.



Wildlife Safety - Tips to respect wildlife, reporting wildlife interactions, distancing, fishing guidelines and gear suggestions.



Community Responsibility – Tips for community sustainability along with mindful and responsible travel.





Top Earned Media Coverage

Home > Adventures > A Road Trip Through Wyoming



50. Wyoming



The 50 Best Places to Travel in 2021

No one could have dreamed up a better marketing plan for Wyoming than social distancing. The country's least-populated state has only six people per square mile, meaning it's not only easy, but natural to stay safely apart. Yellowstone and Grand Teton have both seen huge spikes in visitation (credit "Yellowstone" binge), but don't overlook Wyoming's 12 state parks. A new 4-mile section was



Exploring Buffalo Bill's Wyoming

True West April 2021 | Steve Friesen | [f](#) [t](#)

HIT THE ROAD AND DISCOVER THE GRAND HISTORY AND HERITAGE OF WILLIAM CODY ACROSS THE COWBOY STATE.



Visitors to Cody, Wyoming, should allow at least a day, maybe even three, to tour the five museums of the Buffalo Bill Center of the West.
- COURTESY BBCW -

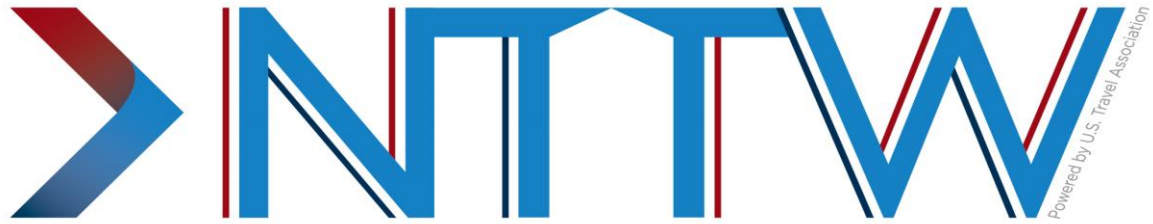




Public Relations & Media Strategy

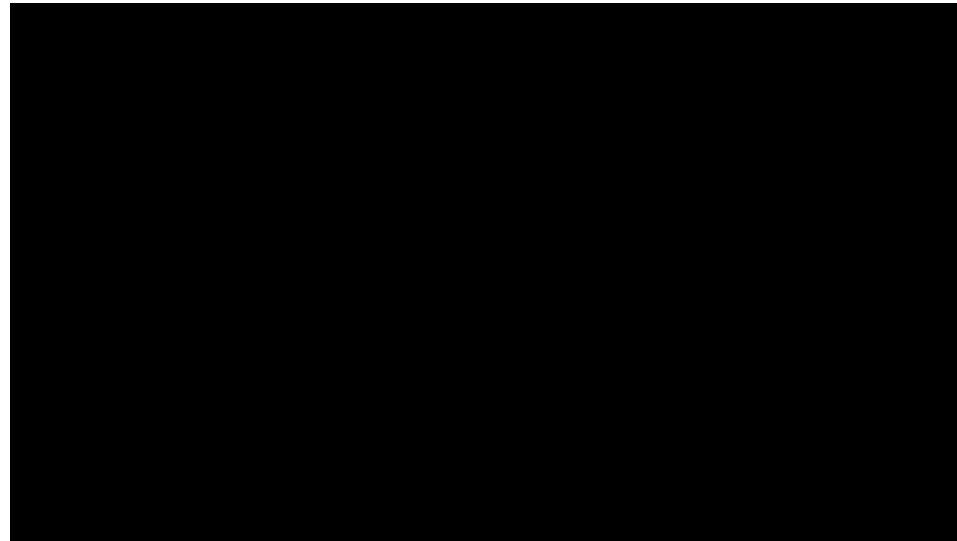
- **Dallas Media Mission:** Target media in one of WY's top target markets.
- **Mexico Media Efforts:** Top International Rebound Market
- **Media Relations & Press Trips:** Engage media to experience WY
- **Driving Prominent WY Coverage:** Pitch unique storytelling opportunities for WY





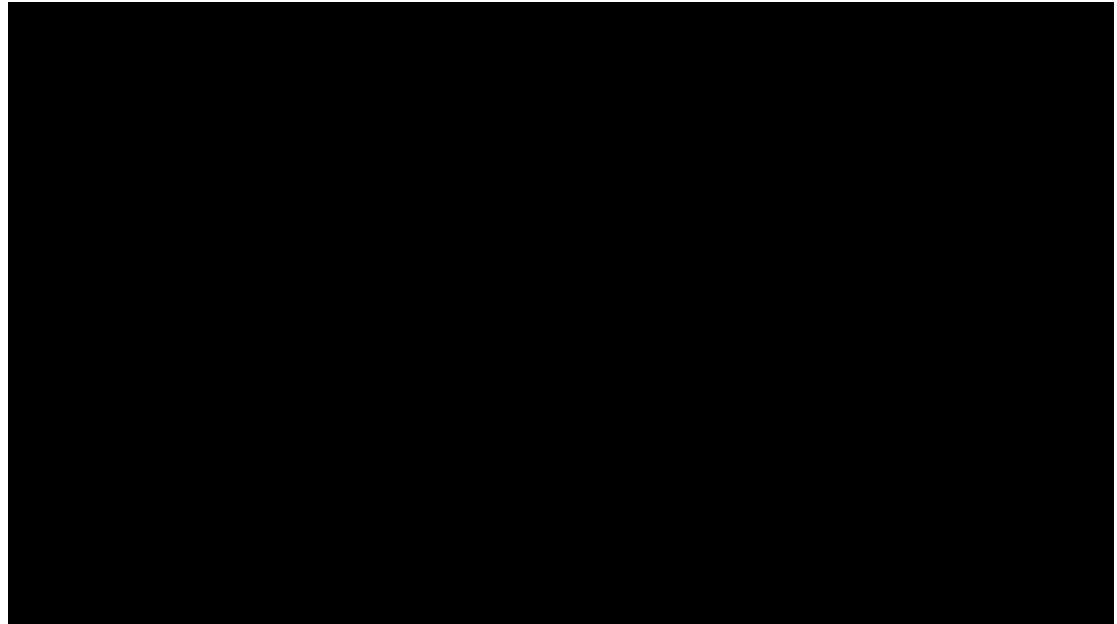
NATIONAL **TRAVEL & TOURISM** WEEK

MAY 2-8, 2021





Evanston, WY





Partner Development

- **Wyoming Best and Continuation into the future:**
 - Multi-stage partner development program
 - Started in 2019
 - Provides strategies for growth from a developmental lens
 - Explores local, regional, and multi-county opportunities
 - 12 Counties have completed the first stages





WY Relocate



NATIONAL PARKS & MONUMENTS

THINGS TO DO

TRIP IDEAS

PLAN YOUR TRIP



WY RELOCATE? *That's WY*

RELOCATE FOR A LIFE OF ADVENTURE.

More and more, the cities and suburbs have begun to feel like concrete cages. With our world changing so rapidly, there's never been a better time to make a move. Relocating to Wyoming means building a life you want, where you can spend less, earn more and adventure most. This is your chance to plant your roots where they have room to grow.



WY Relocate



 Wyoming Office of Tourism 
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Remote jobs are more popular than ever. Take being remote to the next level by relocating to Wyoming.

Spend less. Earn more. Adventure most. [#WYrelocate](#)



TRAVELWYOMING.COM
Move to Wyoming

[Learn More](#)

 Like

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Take working remotely to the next level by relocating to Wyoming. Plant your roots where they have room to grow in our wide-open spaces.

Spend less. Earn more. Adventure most. [#WYrelocate](#)



TRAVELWYOMING.COM
Move to Wyoming

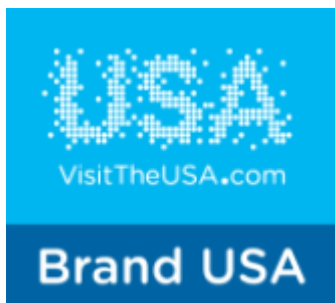
[Learn More](#)





International Strategy

- **Canada and Mexico:** Top two international markets projected to return the quickest
- **Brand USA:** Multi-Channels, United Stories, USA Discovery Program, Global Inspiration Program, Visittheusa.com and Mexico Sales Mission 2022
- **Great American West** – Focus marketing efforts on markets with highest ROI – Germany, UK, and France





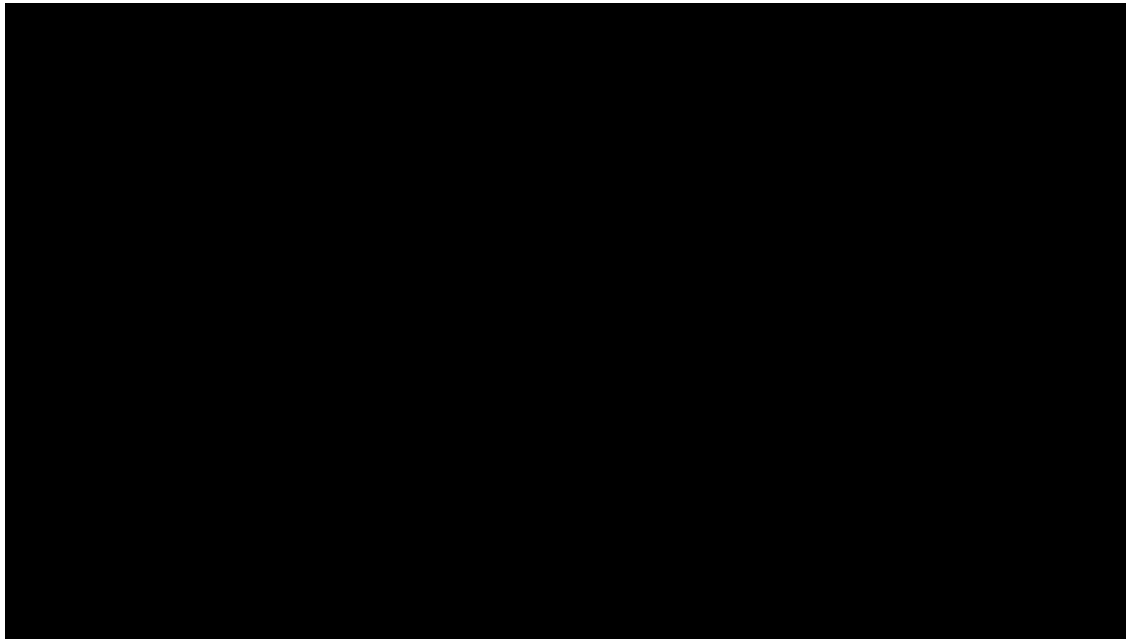
United Stories: Winter White in Wyoming





International Strategy

- **WY's Product Offerings in Europe**





Strategy going forward.....

- **Leverage sustainable funding to optimize marketing and messaging**
- **Deepen collaborations to address gaps in the industry**
- **Lead the industry with sound destination management practices**
- **Elevate the value of the visitor economy through grassroots advocacy**





Wyoming Film Production Incentive (WFPI)

A program created to make Wyoming more competitive by bringing the jobs, economic impact and tourism promotion that on-location filming contributes to a state.





Other opportunities for growing Wyoming's visitor economy

CARES Funds - \$5 million to local lodging tax boards in 2020

ARP Funds – US Dept of Treasury, 5-10-21Update

2. Addressing the negative economic impacts caused by the public health emergency

- **Speeding the recovery of the tourism, travel, and hospitality sectors.....**





Other opportunities for growing Wyoming's visitor economy

