



# 2025 Advertising Effectiveness

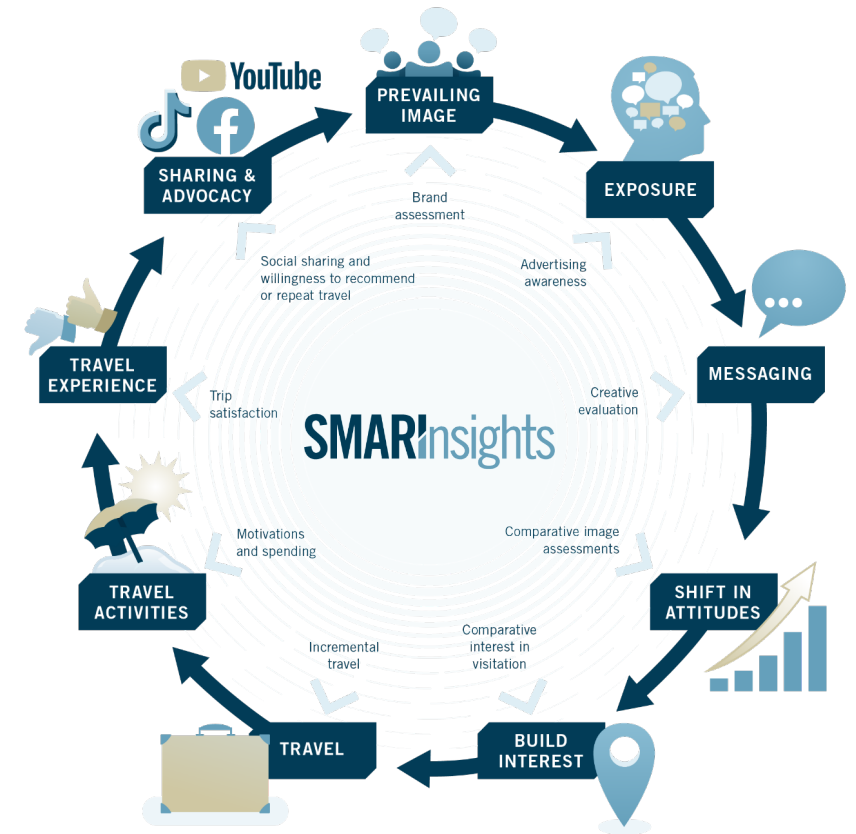
September 2025

# Methodology

- The Wyoming Office of Tourism (WOT) has been measuring the influence of their paid marketing efforts through an incremental travel methodology with SMARInsights since 2006. For nearly 20 years, the organization has prioritized understanding the influence of the paid media investment not only on generating travel to the state, but also on building the image of the state and consumer consideration for Wyoming as a travel destination.
- The goal of this research study is to quantify the following measures of marketing effectiveness:
  - Reach and effectiveness of the campaign overall and by media type
  - Efficiency of the media by market against industry norms
  - Reaction to the creative against national benchmarks
  - Lift in KPIs of perception of the destination, familiarity with the product, and interest in visiting
  - Incremental travel and visitor spending generated from the marketing
  - A return on investment of the media buy

# Methodology

- SMARInsights has developed a methodology for destination marketing organizations to measure the effectiveness of their advertising and marketing. The methodology was developed to account for the multitude of ways in which people make their travel decisions. The decision process comprises several steps, and each step can be influenced by effective marketing.
- The intent of this research is to evaluate the impact of the paid media throughout the entire travel planning cycle, from initial exposure, reactions to messaging, shifts in attitude and building interest, the act of traveling, and the destination experience.
- The SMARInsights methodology for evaluating destination marketing is built around four key pillars: reach of the marketing, traveler reactions to the creative, the influence of marketing on traveler perceptions of the destination, and incremental travel generated by marketing.
- SMARInsights has used this methodology for more than 30 state travel offices and 75 local destination marketing organizations. This approach is considered the industry standard for evaluating the impact of paid media investment, utilizing first-party data to understand the economic impact of leisure marketing.



# Market Sampling

- The sampling plan was designed to reflect how WOT places and targets media. A total of nearly 4,000 interviews were conducted in WOT's target markets (distribution to the right).
- Surveys were conducted September 10-21, 2025. Of note is that this is about three weeks earlier than the 2024 fielding dates, but it was necessary to meet timing needs. A national sample vendor provided the respondents for online surveying. Respondents were qualified as travel decision makers who regularly take leisure trips.
- At the conclusion of data collection, results were cleaned, coded, and weighted to be representative of the population of each market.

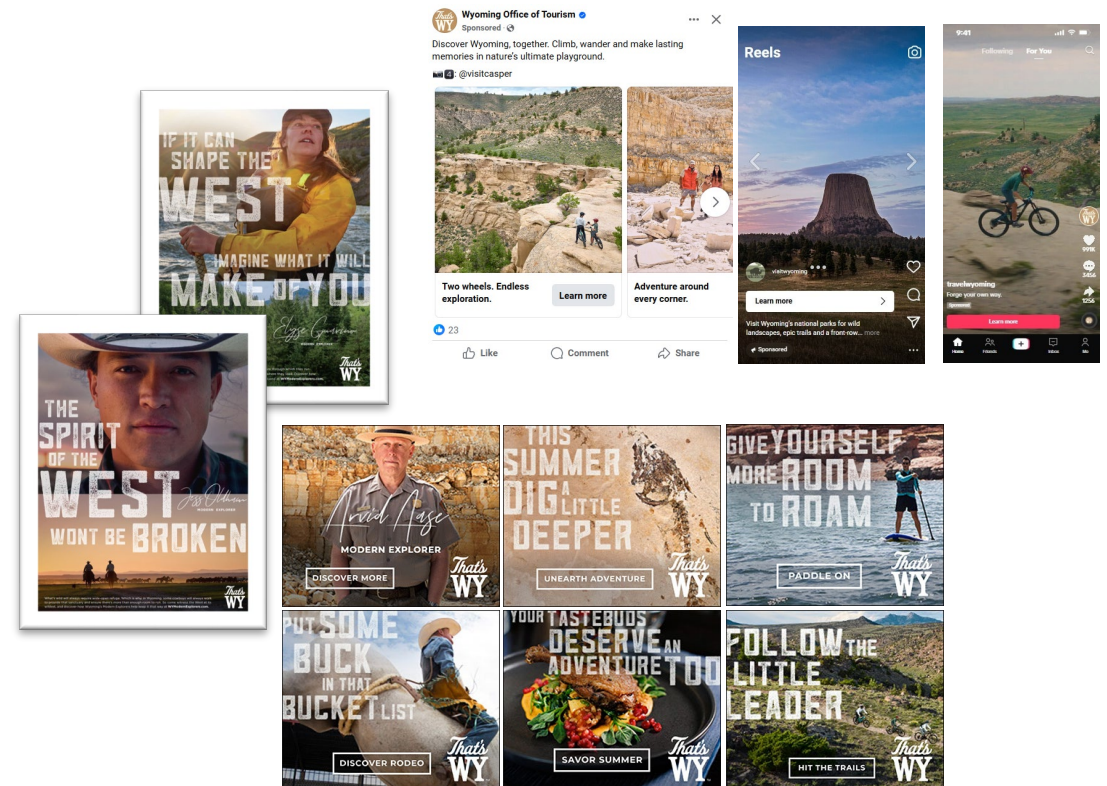
Market	Completed Surveys
National	2,189
Denver	301
Salt Lake City	298
Chicago	300
Dallas	302
Las Vegas	296
Houston	297
Total	3,983



# Campaign Overview & Budget

- The paid media campaign for summer 2025 was an expansion of the “That’s WY” campaign that has been in-market for a number of years, but it included some additional creative components as well as an expansion of the paid media partnerships, especially with partners like Expedia.

Partnerships	2024	2025	% Change
	\$1,500,000	\$1,675,000	12%
Social	\$990,000	\$1,095,000	11%
Digital	\$964,786	\$998,748	4%
Video	\$625,714	\$843,248	35%
Radio	\$425,000	\$300,000	-29%
Print	\$105,000	\$131,480	25%
Total	\$4,610,500	\$5,043,476	9%



# Insights

- Overall influenced visitor spending for the 2025 *That's WY* campaign increased to \$1.6 billion, higher than any previous measure. Given the amount the Wyoming Office of Tourism invested in paid media, this results in a return on investment of \$322, 13% higher than in 2024
  - Influenced visitor spending contributed nearly \$65 million to the state of Wyoming via tax receipts.
- Awareness of the campaign fell slightly, most notably in the National markets. In the spot markets receiving the heavy-up investment, recall of the paid marking was relatively steady or even somewhat higher than in 2024.
  - The media placements are considered far more efficient than average state DMO campaigns. *That's WY* has a cost to reach an aware household of only \$0.11, less than half that of other state tourism offices.
- The *That's WY* campaign outperforms most DMO campaigns for communicating the desired messages, with most ratings in the top 25% and a number – especially for showing natural beauty and Western culture – generating ratings in the top 10%.
  - Though the campaign is good at delivering messages, it is not as motivating to consumers. The campaign generates average ratings for making consumers interested in learning more about Wyoming and traveling to the state.
- The *That's WY* campaign improves the position of the state in the competitive set considerably, especially for likelihood to visit.
- Recall of the campaign also influences trip spending of visitors, with those who saw *That's WY* spending more than average.
  - There are significant differences in trip spending by market, with those in nearby Salt Lake City and Denver spending considerably less than more distant markets.

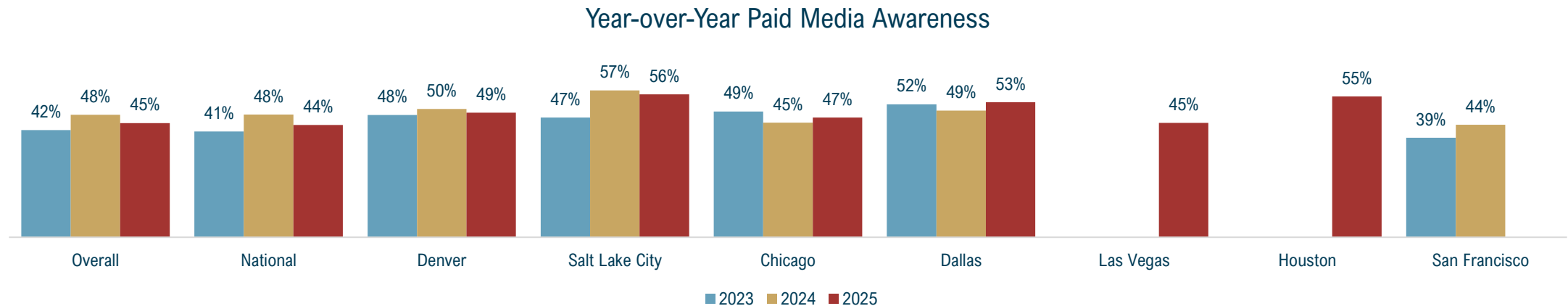
	2019	2021	2022	2023	2024	2025	SMARInsights' Benchmark
Awareness	41%	47%	40%	42%	48%	45%	38%*
Cost per aware HH	\$0.12	\$0.09	\$0.10	\$0.13	\$0.10	\$0.11	\$0.29
ROI	\$343	\$192	\$336	\$260	\$284	\$322	\$264
Tax ROI	\$13.73	\$7.70	\$13.50	\$10.39	\$11.61	\$12.86	\$14.84

# Campaign Awareness

# Paid Media Recall

## Overall and Market Level

- Overall, 45% of respondents were aware of paid creative from the “That’s WY” campaign. This is down three percentage points from last year but remains higher than 2023.
  - National market consumers continued to report awareness rates that are nearly identical to the overall awareness rate.
- New spot markets Las Vegas and Houston reported awareness rates as high or higher than the overall rate, despite it being their first year receiving additional funding.
  - Other spot markets saw a mixture of results as Denver and Salt Lake City saw slight drops in awareness, while Chicago and Dallas saw a small increase. San Francisco was included as a spot market during this research period and was therefore included in the national sample.





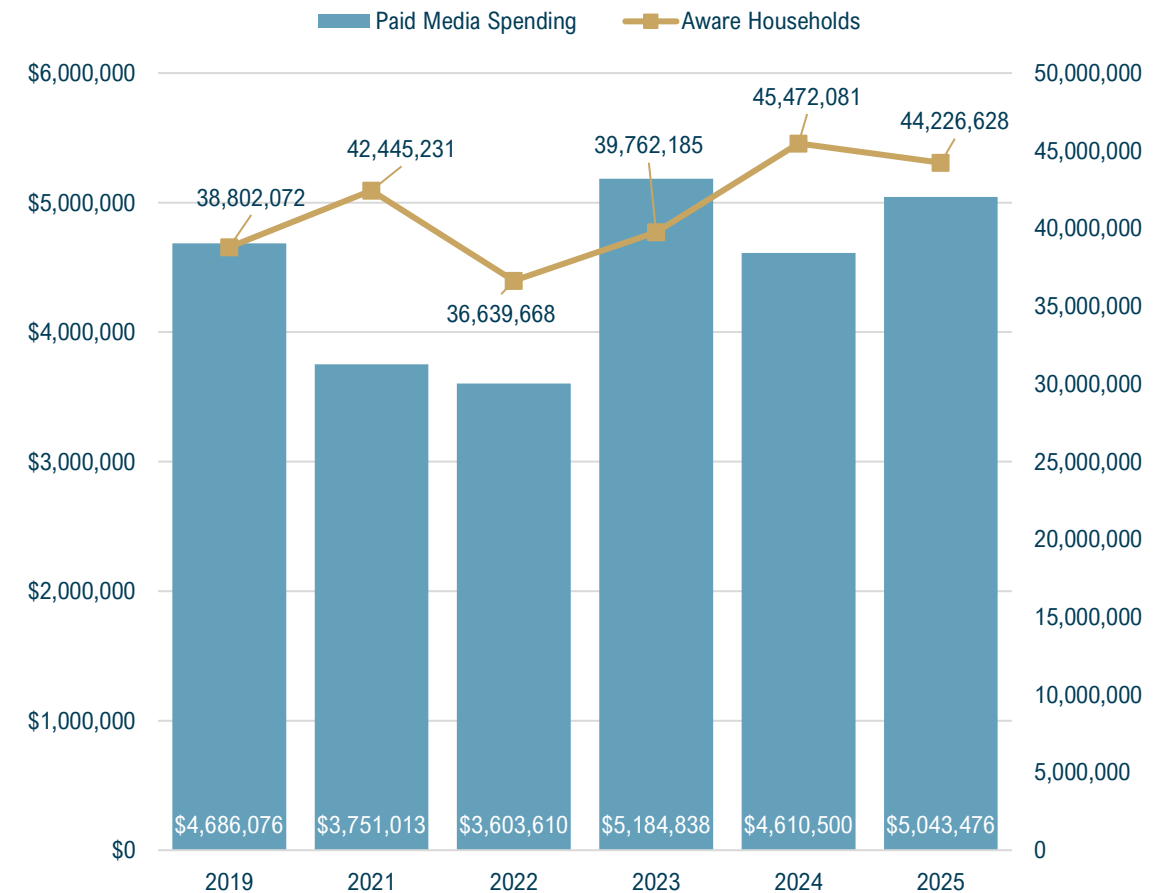
# Media Efficiency

## Year-over-Year

- Despite a drop in awareness, the “That’s WY” campaign generated over 44 million aware households.
- The average cost per aware household increased slightly to \$0.11 per aware household, which is anticipated given a slight budget increase in paid media.
- This continues to be far more efficient than average as SMARInsights’ benchmark for state DMOs with a similar budget is \$0.29 per household.

	2019	2021	2022	2023	2024*	2025*
Target Households	94,639,200	90,309,002	91,599,169	95,064,308	95,188,230	99,361,207
Paid Media Awareness	41%	47%	40%	42%	48%	45%
Aware Households	38,802,072	42,445,231	36,639,668	39,762,185	45,472,081	44,226,628
Paid Media Spending	\$4,686,076	\$3,751,013	\$3,603,610	\$5,184,838	\$4,610,500	\$5,043,476
Cost-Per-Aware Household	\$0.12	\$0.09	\$0.10	\$0.13	\$0.10	\$0.11

\* Summer spend only, excluding paid search



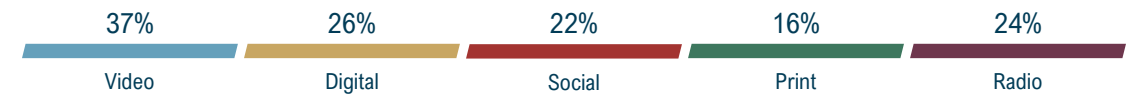
# Recall by Paid Medium

## Overall and Market Level

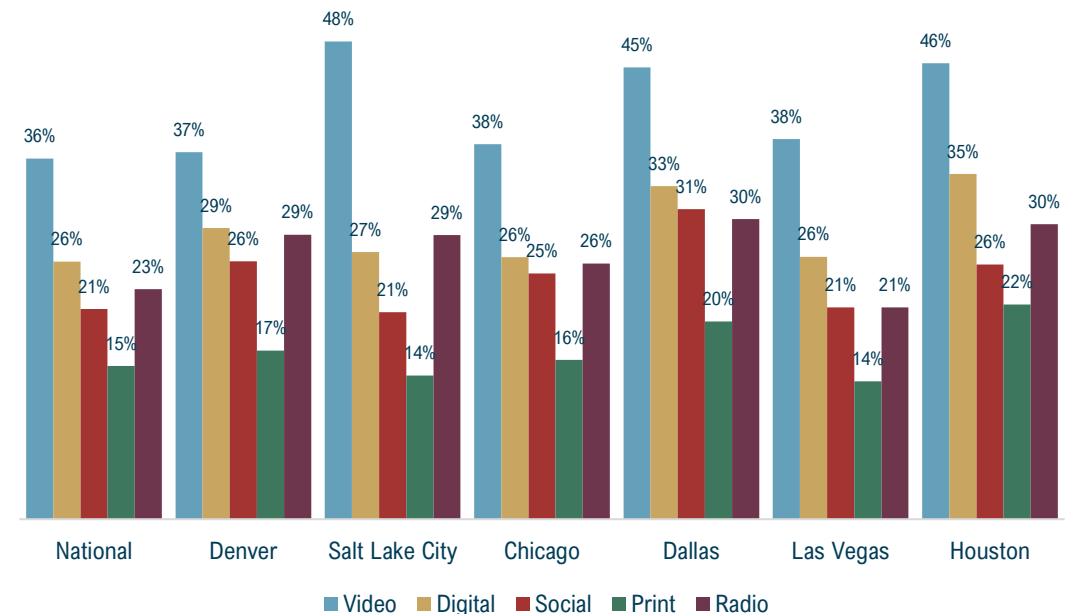
- Awareness levels across different mediums are consistent with SMARInsights' typical findings, with video creative generating the highest awareness.
  - Print media experienced a significant decline in awareness compared to 2024 (26%), despite similar levels of investment.
- Digital and social media also saw notable year-over-year decreases of 9% and 8%, respectively.
- Video recall increased slightly overall, driven largely by strong gains in key spot markets including Salt Lake City, Chicago, and Dallas.

Media Type	Spend	% of Budget
Social	\$1,095,000	22%
Audio/Broadcast	\$300,000	6%
Video	\$843,248	17%
Display/Travel Digital	\$998,748	20%
Partnerships	\$1,675,000	33%
Print	\$131,480	3%

Overall Recall by Medium



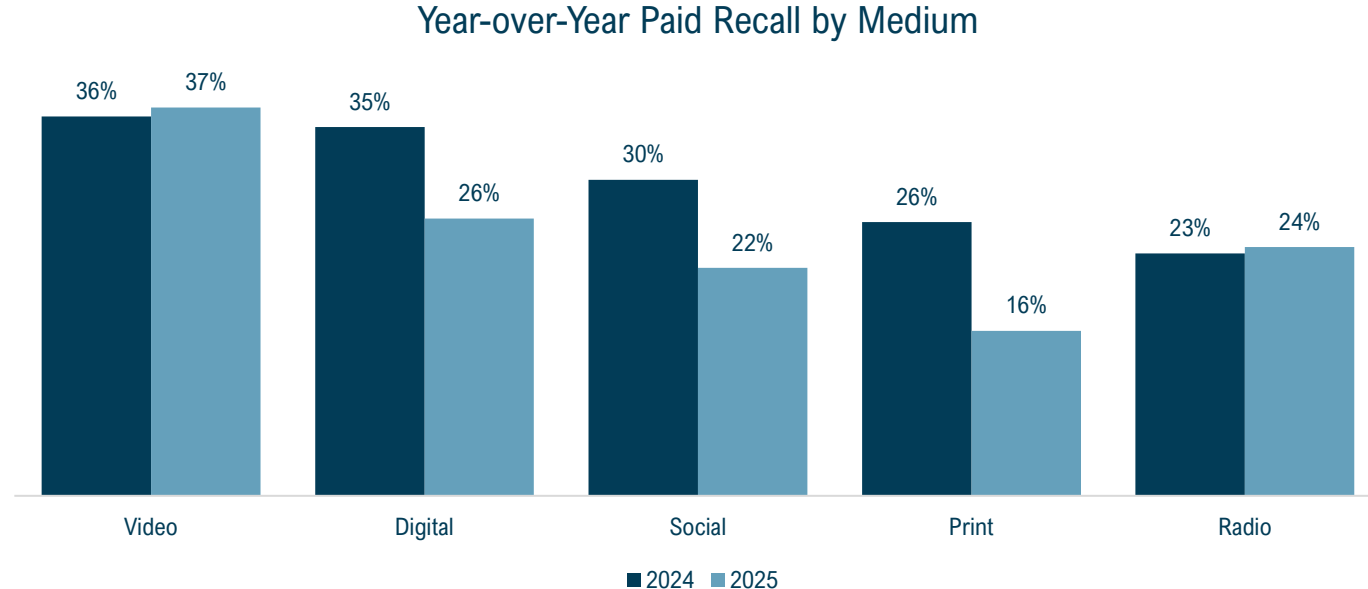
Paid Recall by Medium by Market



# Recall by Paid Medium

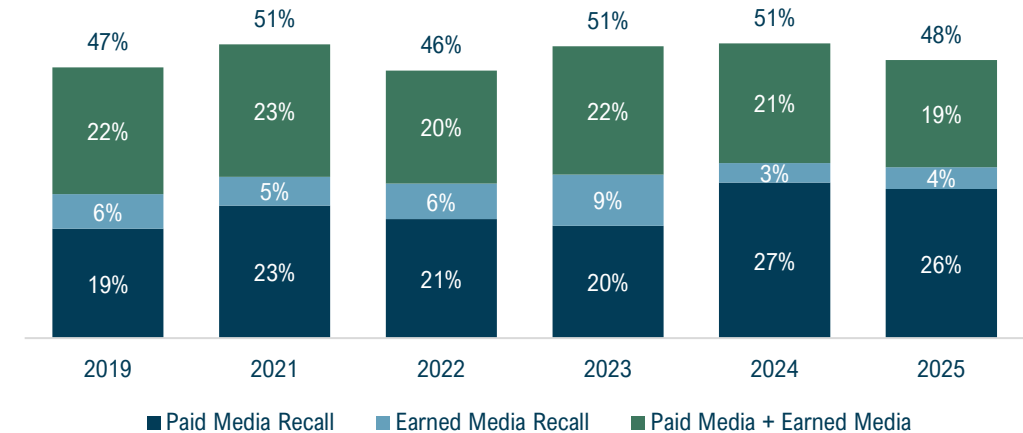
## Year-over-Year

- Often, levels of recall are directly correlated to media investment. Although WOT spent slightly more in paid media for the summer 2025 campaign, recall fell – most notably in digital, social and print.
- Of note is that the social included in 2024 was primarily creative from Facebook, while the 2025 survey included Instagram, Snapchat, and TikTok creative – social platforms with less overall usage.



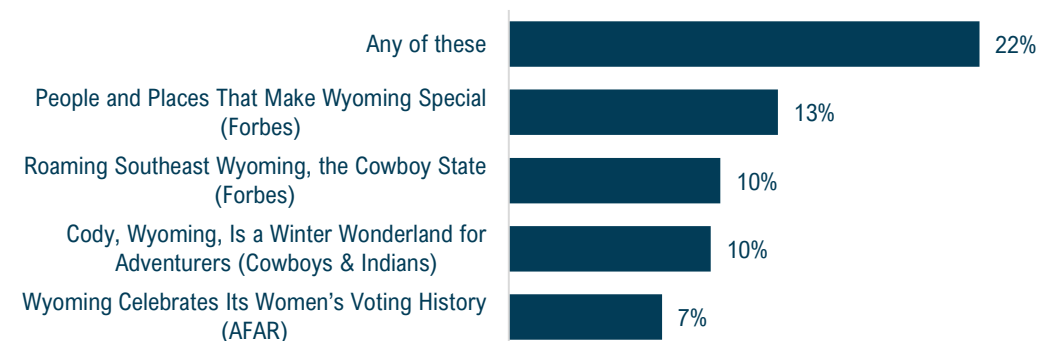
# Earned Media Recall

- SMARInsights once again tested articles and stories to evaluate the additional awareness generated by earned media. Overall, 22% of respondents reported awareness of at least one earned media piece.
- This lift increases total awareness to 48%, adding an estimated 3.75 million aware households.
- Among individual pieces, the two Forbes articles performed strongest, with 13% aware of *People and Places that Make Wyoming Special* and 10% aware of *Roaming Southeast Wyoming, the Cowboy State*.



	2019	2021	2022	2023	2024	2025
Targeted Households	94,639,200	90,309,002	91,599,169	95,064,308	95,188,230	99,361,207
Paid + Earned Awareness	47%	51%	46%	51%	51%	48%
Aware Households	44,480,424	46,057,591	42,540,097	48,190,364	48,731,496	47,977,140
Earned Media Awareness	5,678,352	3,612,360	5,900,430	8,428,179	3,259,415	3,750,512

## Individual Earned Media Awareness

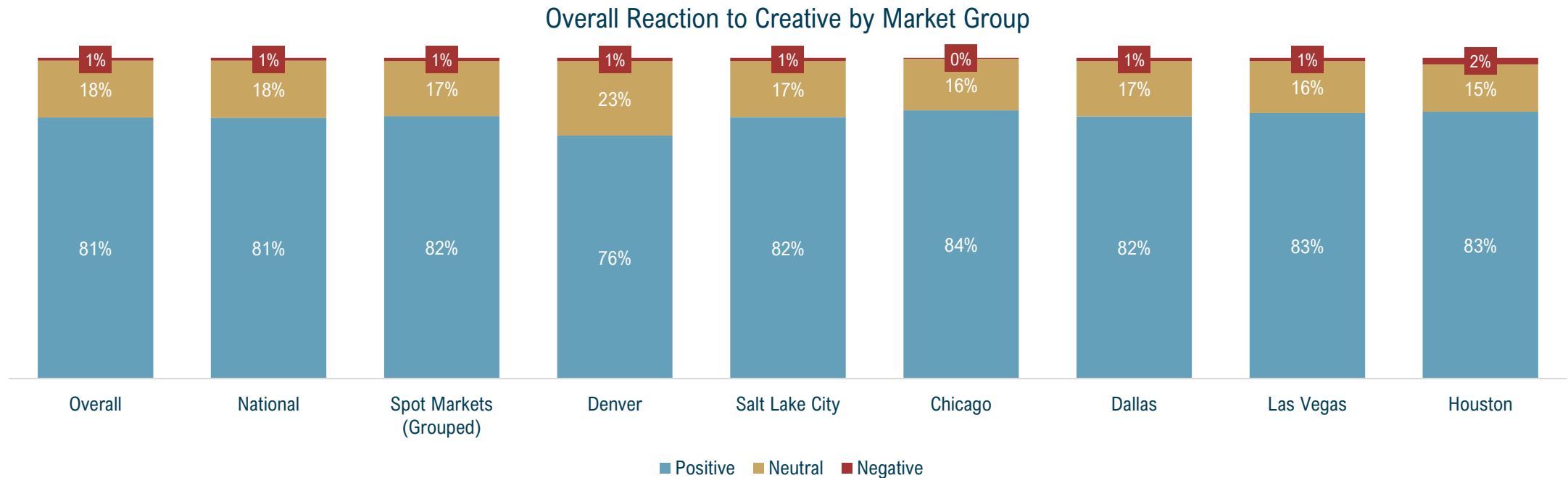


# Creative Evaluation



# Overall Reaction to Creative

- Reactions to the “That’s WY” campaign were overwhelmingly positive, with more than 80% of respondents reporting a favorable impression and fewer than 1% expressing a negative response.
- Positive reactions were consistently strong across market groups, ranging from 82% to 84% except in Denver. While Denver fell slightly below the 80% mark, the decline was not due to an increase in negative sentiment but rather a shift toward neutral reactions.



# Communication Ratings Overall

- Over several years of performing research, SMARInsights has developed benchmarks for destination creative based on the evaluation of hundreds of campaigns. Based on a 5-point scale, the average rating for something the creative is trying to communicate is 3.8, with campaigns in the top 10% generating ratings of 4.2 or higher.
- Overall, the “That’s WY” campaign communicates the intended messages very well.
- All but one attribute scored above the top 25% benchmark, while four attributes scored above the top 10% benchmark.
- The message that resonated most strongly was that *Wyoming offers vast, diverse landscapes filled with endless natural beauty*.
  - This attribute scored well above the top 10% benchmark.



# Communication Ratings

## National vs Individual Spot Markets



SMARInsights Communication Ratings Benchmarks

- Consumers in spot markets were generally more positive than those in national markets, with Denver standing out as the exception.
- Denver respondents were the only group that did not rate any attribute above the top 10% benchmark and were also the only group to rate any attribute below average.
  - These lower scores are unexpected given Denver's proximity to and familiarity with Wyoming. One possible explanation for these lower ratings is that Colorado is a primary competitor to Wyoming, offering many of the same core products and experiences. This overlap may contribute to consumers in Denver perceiving Wyoming less favorably, as the state competes directly with what they already have closer to home.

Ad Communication Ratings	National	Denver	Salt Lake City	Chicago	Dallas	Las Vegas	Houston
With vast, diverse landscapes full of endless natural beauty	4.36	4.17	4.38	4.46	4.37	4.40	4.41
To escape to the comfort of the wide open spaces	4.26	4.01	4.30	4.31	4.20	4.29	4.34
Where I can enrich and expand my understanding of Western lore and culture	4.24	4.03	4.29	4.24	4.26	4.24	4.29
Where I can indulge a passion for the great western outdoors	4.20	4.06	4.30	4.25	4.21	4.25	4.30
Where I feel a sense of freedom and release	4.18	3.93	4.21	4.27	4.26	4.21	4.28
Where I can be a bold explorer	4.16	3.90	4.20	4.27	4.17	4.14	4.28
Where I can learn new things and grow as a person	4.12	3.85	4.06	4.15	4.14	4.11	4.19
Where I can unplug and focus on personal wellness	4.05	3.84	4.14	4.16	4.10	4.16	4.15
Where my family and I can challenge ourselves and try new things	4.09	3.83	4.14	4.14	4.14	4.01	4.19
Where people possess great determination and grit	4.08	3.82	4.13	4.09	4.11	4.03	4.12
Where I can reconnect with my family and enjoy simple pleasures	4.00	3.76	4.11	4.06	3.96	4.01	4.07
Where I am encouraged to travel responsibly	3.98	3.70	3.97	4.05	4.04	3.95	4.05

# Communication Ratings

## National vs Spot



SMARInsights Communication Ratings Benchmarks

- When spot markets are evaluated collectively, they remain slightly more positive overall with five attributes surpassing the top 10% benchmark, whereas only four attributes surpassed this mark in national markets.

Ad Communication Ratings	National	Spot Markets
With vast, diverse landscapes full of endless natural beauty	4.36	4.38
To escape to the comfort of the wide open spaces	4.26	4.25
Where I can enrich and expand my understanding of Western lore and culture	4.24	4.23
Where I can indulge a passion for the great western outdoors	4.20	4.23
Where I feel a sense of freedom and release	4.18	4.21
Where I can be a bold explorer	4.16	4.18
Where I can learn new things and grow as a person	4.12	4.10
Where my family and I can challenge ourselves and try new things	4.09	4.10
Where I can unplug and focus on personal wellness	4.05	4.10
Where people possess great determination and grit	4.08	4.06
Where I can reconnect with my family and enjoy simple pleasures	4.00	4.00
Where I am encouraged to travel responsibly	3.98	3.99

# Communication Ratings

## Overall - Historical



SMARInsights Communication Ratings Benchmarks

- SMARInsights has conducted advertising effectiveness research for the Wyoming Office of Tourism since 2006. Over the years, many of the communication attributes for creative have remained consistent, with three being measured in every study.
  - For the complete historical communication ratings, see *appendix*.
- Overall, communication ratings have improved despite year-to-year fluctuations. Attributes that were originally rated as “average” or “below average” in 2006 have since risen above the top 25% benchmark, with several now exceeding the top 10% benchmark.
- Looking at a narrower timeframe attributes have seen general increases when compared to communication ratings from 2022 research, despite seeing year-to-year fluctuations.

Communication Ratings	2025	2024	2023	2022
To escape to the comfort of the wide open spaces	4.26	4.24	4.32	4.22
Where I can indulge a passion for the great western outdoors	4.20	4.22	4.30	4.20
Where I can enrich and expand my understanding of Western lore and culture	4.24	4.18	4.23	4.14
With vast, diverse landscapes full of endless natural beauty	4.36	4.36	4.43	4.34
Where I feel a sense of freedom and release	4.19	4.21	4.27	4.15
Where I can reconnect with my family and enjoy simple pleasures	4.00	3.99	3.98	3.89
Where I am encouraged to travel responsibly	3.98	3.95	4.06	3.86
Where I can be a bold explorer	4.17	4.16	4.23	4.14
Where people possess great determination and grit	4.08	4.08	4.09	4.04
Where I can learn new things and grow as a person	4.11	4.09	4.08	4.00

For full historical table see *appendix*.

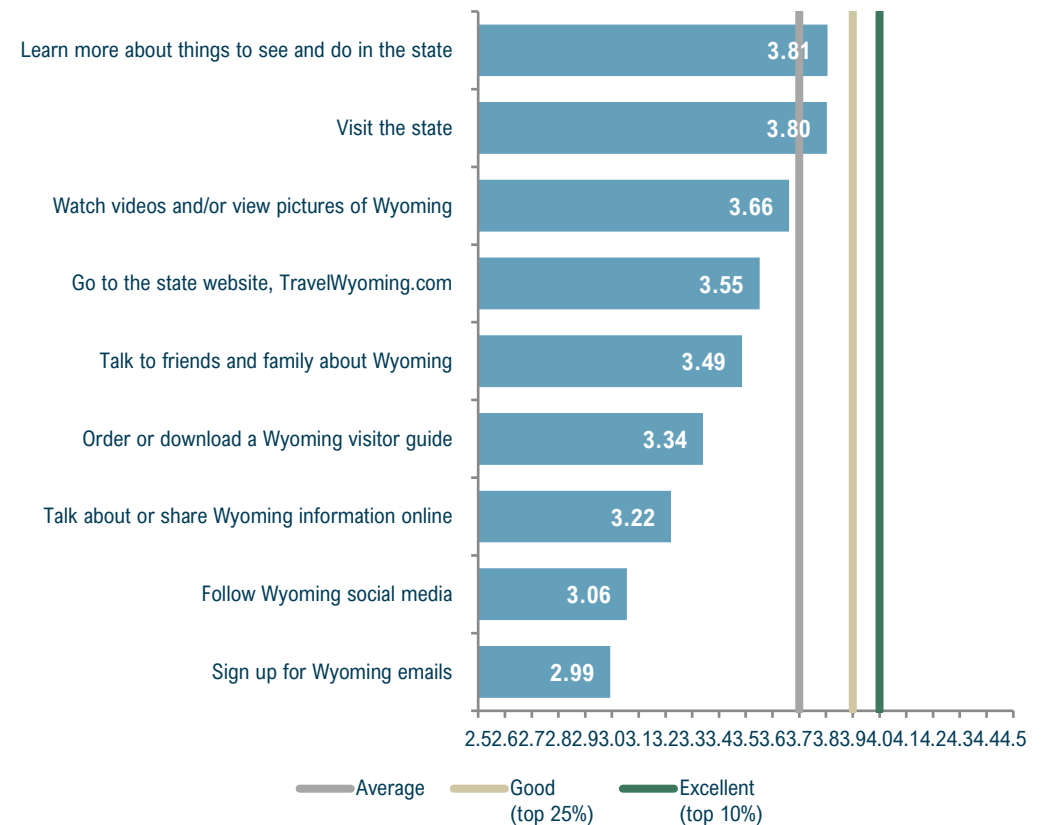


# Impact Ratings

## Overall

- A similar approach was used to generate benchmarks for impact ratings. However, because it is generally more challenging to motivate a consumer to take action than to simply communicate a message, the benchmarks for impact attributes are slightly lower. The average rating is 3.7 on a 5-point scale, and only the top 10% of destination marketing efforts achieve ratings of 4.0 or higher.
- The two most important impact attributes, *visit the state* and *learn more about the state*, were the only impact attributes to receive above average ratings.
- Other actions are difficult to generate strictly through creative; however, other attributes such as *watch videos and/or view pictures of Wyoming* saw a year-over-year increase.

Impact Ratings (5-point scale)



# Impact Ratings

## National vs Individual Spot Markets

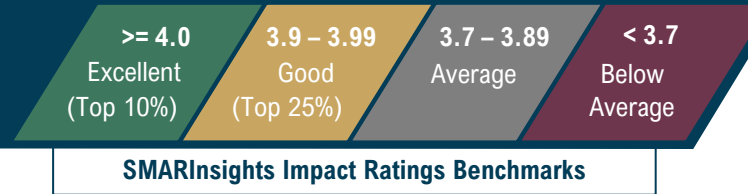


- Similar to the trends in communication ratings, consumers in spot markets were generally more positive than those in national markets, with Denver being the key exception.
- Denver respondents rated all impact attributes below average; however, their two strongest attributes were *visit the state* and *learn more about things to see and do in the state*.
- Among all markets, only Salt Lake City and Chicago rated *visit the state* above the top 25% benchmark.

Ad Impact Ratings	National	Denver	Salt Lake City	Chicago	Dallas	Las Vegas	Houston
Visit the state	3.80	3.66	3.92	3.92	3.86	3.80	3.89
Learn more about things to see and do in the state	3.80	3.59	3.87	3.89	3.86	3.84	3.92
Watch videos and/or view pictures of Wyoming	3.66	3.36	3.55	3.78	3.75	3.60	3.79
Go to the state website, TravelWyoming.com	3.55	3.24	3.48	3.64	3.69	3.56	3.63
Talk to friends and family about Wyoming	3.48	3.29	3.46	3.54	3.71	3.53	3.57
Order or download a Wyoming visitor guide	3.34	3.07	3.27	3.41	3.54	3.21	3.44
Talk about or share Wyoming information online	3.22	2.93	3.10	3.31	3.39	3.20	3.31
Follow Wyoming social media	3.04	2.79	3.09	3.22	3.28	2.97	3.20
Sign up for Wyoming emails	2.99	2.68	2.94	3.10	3.23	2.95	3.06

# Impact Ratings

## National vs Spot

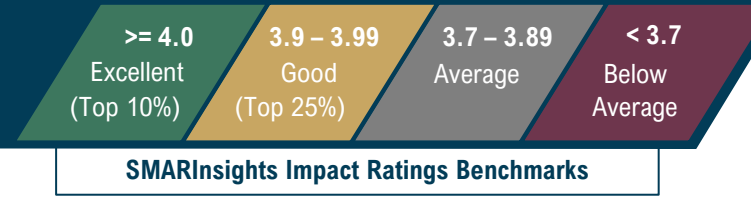


- Similar to the patterns observed in communication ratings, spot markets as a group remain slightly more positive overall. While both national and spot market consumers rated two attributes above average, spot market respondents consistently gave higher scores across individual attributes.
- For both market groups, the highest-rated impact attributes were *visiting the state* and *learn more about things to see and do in the state*.

Ad Impact Ratings	National	Spot Markets
Visit the state	3.80	3.86
Learn more about things to see and do in the state	3.80	3.85
Watch videos and/or view pictures of Wyoming	3.66	3.69
Go to the state website, TravelWyoming.com	3.55	3.58
Talk to friends and family about Wyoming	3.48	3.55
Order or download a Wyoming visitor guide	3.34	3.38
Talk about or share Wyoming information online	3.22	3.26
Follow Wyoming social media	3.04	3.15
Sign up for Wyoming emails	2.99	3.04

# Impact Ratings

## Overall - Historical



- In addition to communication ratings, key impact ratings have also been tracked since research began in 2006.
  - Full historical ratings can be found in the *appendix*.
- While impact attributes have not shifted dramatically in terms of benchmark categories, they have shown slight numerical gains over the past 5 years.

Impact Ratings	2025	2024	2023	2022	2021
Visit the state	3.80	3.81	3.85	3.70	3.83
Want to learn more about things to see and do in the state	3.81	3.80	3.85	3.68	3.77
Go to the state website, TravelWyoming.com	3.55	3.56	3.54	3.42	3.48
Talk to friends and family about Wyoming	3.49	3.47	3.47	3.35	3.42
Order or download a Wyoming visitor guide	3.34	3.36	3.31	3.20	3.29
Watch videos and/or view pictures of Wyoming	3.66	3.60	3.63	3.46	3.53
Talk about or share Wyoming information online	3.22	3.22	3.19	3.07	3.09
Follow Wyoming social media	3.06	3.09	3.04	2.91	2.93
Sign up for Wyoming emails	2.99	3.02	2.93	2.86	2.89

*For full historical table see appendix.*

# Advertising Impact

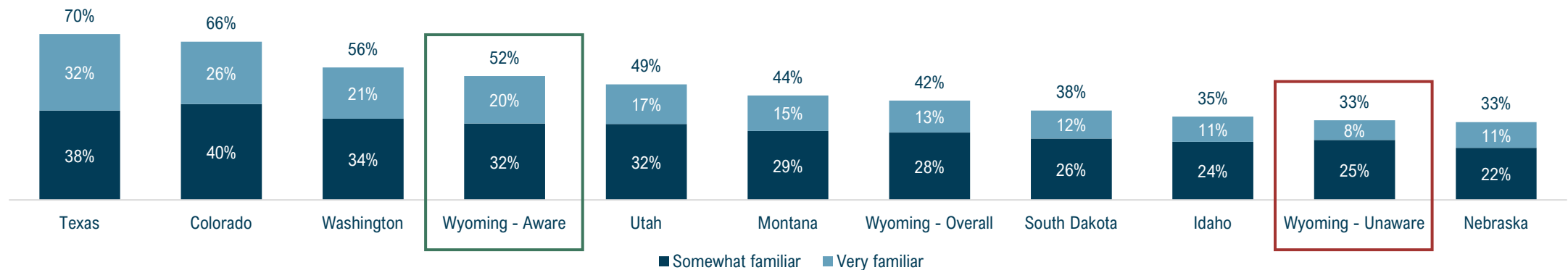


# Familiarity

## Overall

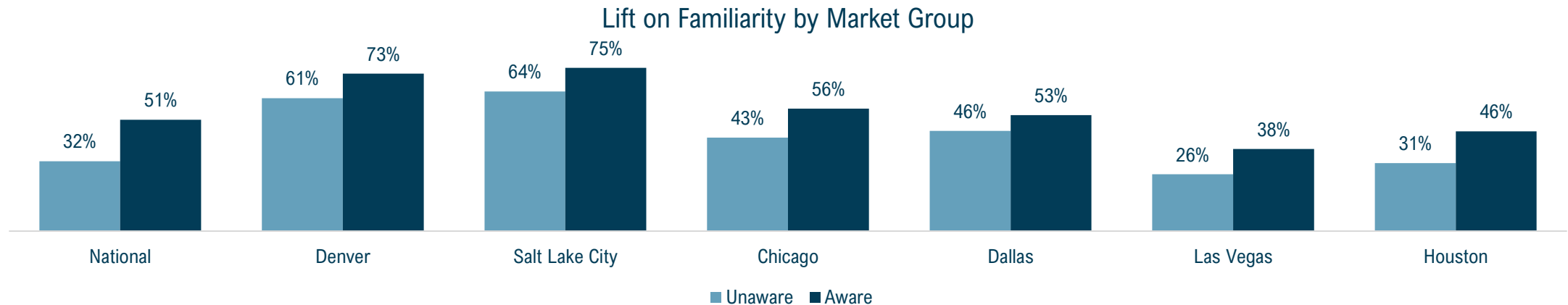
- 42% of all consumers reported being at least somewhat familiar with Wyoming as a leisure destination, which was the 6<sup>th</sup> highest rating among the competitive set. This overall familiarity rate was just below two key competitors: Montana (44%) and Utah (49%).
- Familiarity of Wyoming jumps ahead of both Utah and Montana among consumers that are aware of the “That’s WY” campaign, as more than 50% of these consumers are at least somewhat familiar with the state.
- The level of familiarity with Wyoming drops to just 33% among those unaware of the campaign, which is below South Dakota and Idaho.
- Texas, Colorado, and Washington remain ahead of Wyoming regardless of a consumer's awareness of the campaign.

Advertising Impact on Familiarity vs Competitive Set



# Familiarity Market Group

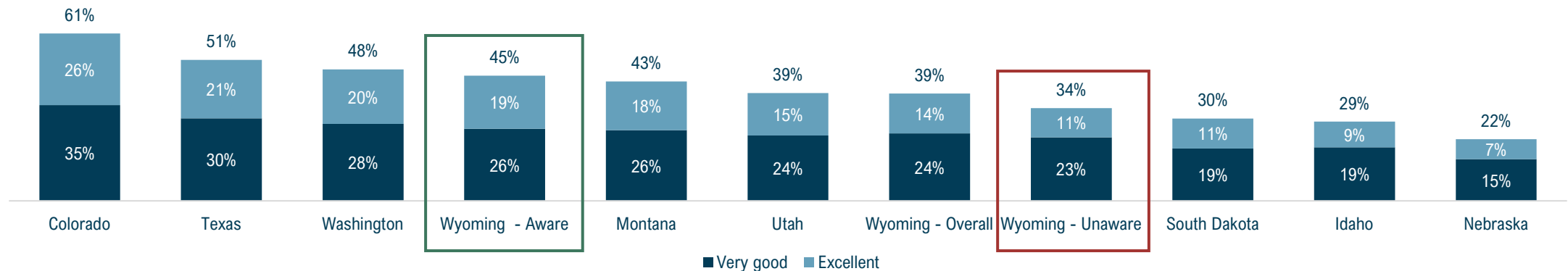
- The campaign drove strong gains in familiarity across all market groups. The most familiar spot markets were Denver and Salt Lake City, as more than 70% of aware consumers reported being at least somewhat familiar and more than 60% of unaware consumers reported being familiar.
  - Unaware consumers in both of these markets reported higher familiarity than any aware consumers from all other market groups.
- Despite being closer to Wyoming than Chicago, the lowest levels of familiarity across all market groups were reported by Dallas, Houston, and Las Vegas.



# Destination Perception Overall

- Just under 40% of all consumers reported that Wyoming is at least a “very good” leisure destination. This mark is once again just under Utah (39%) and Montana (45%).
- The perception of Wyoming as a leisure destination jumps ahead of both Montana and Utah among consumers aware of the campaign. This back-and-forth with Montana and Utah suggests that these states are Wyoming’s key competitors, as states like Colorado and Texas remain well ahead of Wyoming regardless of awareness.
- While the ranking remains unchanged for unaware consumers, the percentage of consumers drops by five points among those unfamiliar with the creative.
- The three most familiar states also rate the destination highest as “very good,” reflecting a strong correlation between familiarity and perceived quality.

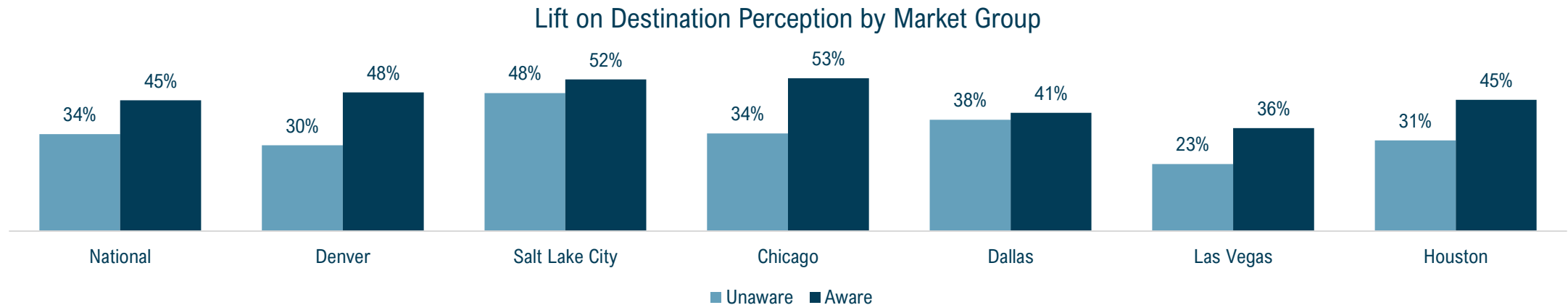
Advertising Impact on Destination Perception vs Competitive Set



# Destination Perception

## Market Group

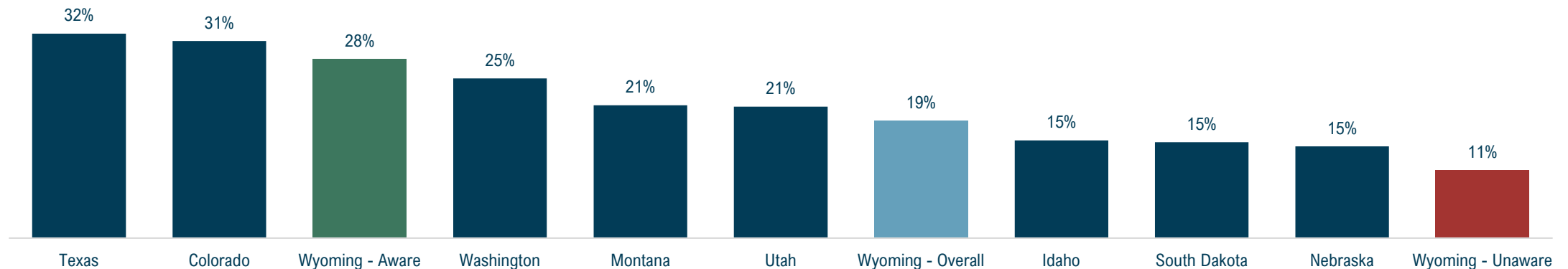
- When analyzing lift on destination perception, the markets with the strongest perception of Wyoming among unaware respondents were also the markets with the smallest lift. This behavior is expected as it is difficult to dramatically increase the perception of Wyoming in markets that already have a good perception of the state.
- Aware consumers from Chicago have a very positive view of Wyoming, as more than half of the respondents from this market said they think Wyoming is at least a “very good” leisure destination.
  - Aware consumers from closer markets Salt Lake City and Denver also rated Wyoming very well.
- Las Vegas consumers had the least positive perception of Wyoming as a leisure destination; despite being a relatively close market, this is expected as consumers from this market also reported being the least familiar.



# Likelihood to Visit Overall

- As was the case with the other two key KPIs, Wyoming's overall position for likelihood to visit is 6<sup>th</sup> , with Montana and Utah just two percentage points ahead.
- Not only does being aware of the “That’s WY” campaign increase a consumer's likelihood to visit Wyoming to 28%, but it also jumps Wyoming above Utah, Montana, and Washington.
  - This is the first metric in which Wyoming has jumped ahead of Washington.
- Consumers unaware of the creative report the lowest likelihood to visit at 11%, falling below bottom-tier competitors such as Idaho, South Dakota, and Nebraska.
- Texas and Colorado remain well ahead in likelihood to visit, indicating that Wyoming’s primary competition is currently Montana and Utah, rather than these larger states.

Advertising Impact on Likelihood to Visit vs Competitive Set

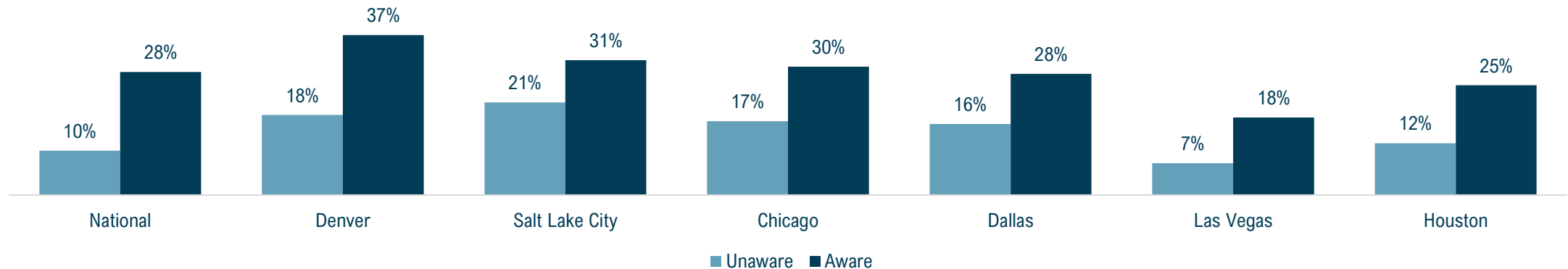




# Likelihood to Visit Market Group

- Lift in likelihood to visit was strong across all market groups. Denver, despite having the second-highest likelihood to visit among unaware consumers, showed the greatest lift between aware and unaware respondents, with aware Denver consumers reporting the highest overall likelihood to visit.
  - This unsurprising as SMARInsights has found throughout many years of research that distance and familiarity with a destination are the key drivers for visitation.
  - Similarly, Salt Lake City reported the highest likelihood to visit among unaware consumers and the second highest likelihood to visit among aware consumers.
- More distant markets such as Dallas, Chicago, and Houston reported lower likelihood to visit among unaware consumers but still demonstrated significant lift, underscoring the campaign's effectiveness in inspiring future visitation.

Lift on Likelihood to Visit by Market Group



# Product Ratings

## Advertising Impact



SMARInsights Destination Ratings Benchmarks

- The “That’s WY” campaign significantly impacted consumer perceptions of the state. All measured attributes saw a positive lift between those who were unaware and those who were aware.
- Key outdoor attributes saw both unaware and aware respondents rate them above the top 10% benchmark, reflecting how strongly the state is perceived to fit these areas.
  - *Home to Yellowstone National Park, has exceptional wildlife viewing, has diverse natural landscapes and scenery, offers abundant outdoor recreation options, and has wide open roads to explore.*
- Not only did each attribute see a positive lift, but four attributes “jumped” up two benchmarks:
  - Average → Excellent (Top 10%)
    - *Is a place to discover American Indigenous People’s culture*
    - *Has interesting historical sites and museums*
  - Below Average → Good (Top 25%)
    - *Is accepting and inclusive*
    - *Is an easy to get to destination*

Destination Ratings Attributes	Overall	Unaware	Aware
Is home to Yellowstone National Park	4.24	4.20	4.27
Has exceptional wildlife viewing	4.19	4.13	4.25
Has diverse natural landscapes and scenery	4.17	4.10	4.23
Offers abundant outdoor recreation options	4.16	4.09	4.23
Has wide-open roads to explore	4.12	4.04	4.19
Where I can find adventure	4.07	3.97	4.17
Is a place to have new experiences	4.05	3.96	4.14
Offers great camping and RVing options	4.04	3.90	4.16
Is a place to experience cowboy culture	4.03	3.96	4.11
Is a good place for a road trip	3.99	3.86	4.11
Is a good place for family vacations	3.97	3.84	4.10
Is where the Old West lives on	3.96	3.85	4.06
Is a place with a bold spirit	3.91	3.77	4.05
Is a place to discover American Indigenous People’s culture	3.89	3.74	4.02
Has interesting historical sites and museums	3.88	3.76	4.00
Ignites curiosity and learning	3.87	3.70	4.02
Makes me feel welcome	3.81	3.67	3.95
Has a vitality to it	3.81	3.69	3.93
Is a good value for the money	3.80	3.63	3.96
Provides a variety of dining choices	3.68	3.51	3.83
Is accepting and inclusive	3.64	3.48	3.79
Is an easy to get to destination	3.60	3.40	3.79
Is great for a winter destination	3.59	3.47	3.71
Is a good year-round destination	3.55	3.39	3.71
Is a place that accommodates people with physical disabilities	3.45	3.29	3.61

# Outdoor Product Ratings

## Overall vs Competitive Set



SMARInsights Destination Ratings Benchmarks

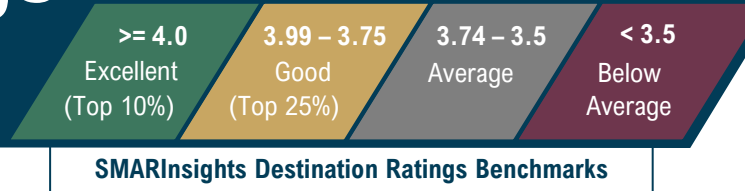
- Wyoming rates at or above the top 10% benchmark for all but one outdoor product attribute, with the lone exception falling just outside the threshold.
- For broad outdoor product attributes, Wyoming competes most directly with Colorado and Montana, both of which score slightly higher despite Wyoming's strong top-tier performance.
- While earlier analysis identified Montana and Utah as Wyoming's primary KPI competitors, the product attribute ratings show Wyoming trailing Montana but clearly outperforming Utah, highlighting that Wyoming has already established a competitive advantage over Utah in this area.

Destination Ratings Attributes	Wyoming	Colorado	Idaho	Montana	South Dakota	Texas	Utah	Nebraska
Is home to Yellowstone National Park	4.24	2.62	3.06	3.72	2.81	2.15	2.61	2.56
Has diverse natural landscapes and scenery	4.17	4.22	3.98	4.26	3.96	3.89	4.01	3.58
Offers great camping and RVing options	4.04	3.98	3.86	4.07	3.81	3.73	3.80	3.59
Offers abundant outdoor recreation options	4.16	4.25	3.93	4.18	3.88	3.96	3.95	3.54
Is a place to experience cowboy culture	4.03	3.45	3.45	3.98	3.64	4.05	3.34	3.30
Has exceptional wildlife viewing	4.19	4.02	3.83	4.22	3.87	3.56	3.75	3.51
Is a place to have new experiences	4.05	4.09	3.80	4.09	3.86	4.02	3.82	3.65
Where I can find adventure	4.07	4.11	3.80	4.11	3.82	3.88	3.81	3.51
Is a good place for a road trip	3.99	4.01	3.80	3.99	3.84	3.89	3.74	3.51
Has wide-open roads to explore	4.12	3.98	3.85	4.16	3.93	3.99	3.87	3.71

\* For table with indexes instead of raw means see appendix.

# General Product Ratings

## Overall vs Competitive Set



- For non-outdoor products, Wyoming did not receive any top 10% ratings but did place within the top 25% across several attributes.
- The strongest perceptions were that Wyoming *is a place where the Old West lives on, a good destination for family vacations, and a place with a bold spirit.*
- Wyoming's non-outdoor product ratings closely mirror those of Montana but continue to outperform Utah overall.
  - The only areas where Utah scored higher were attributes tied to winter travel, including being *a great winter destination* and *a good year-round destination*.

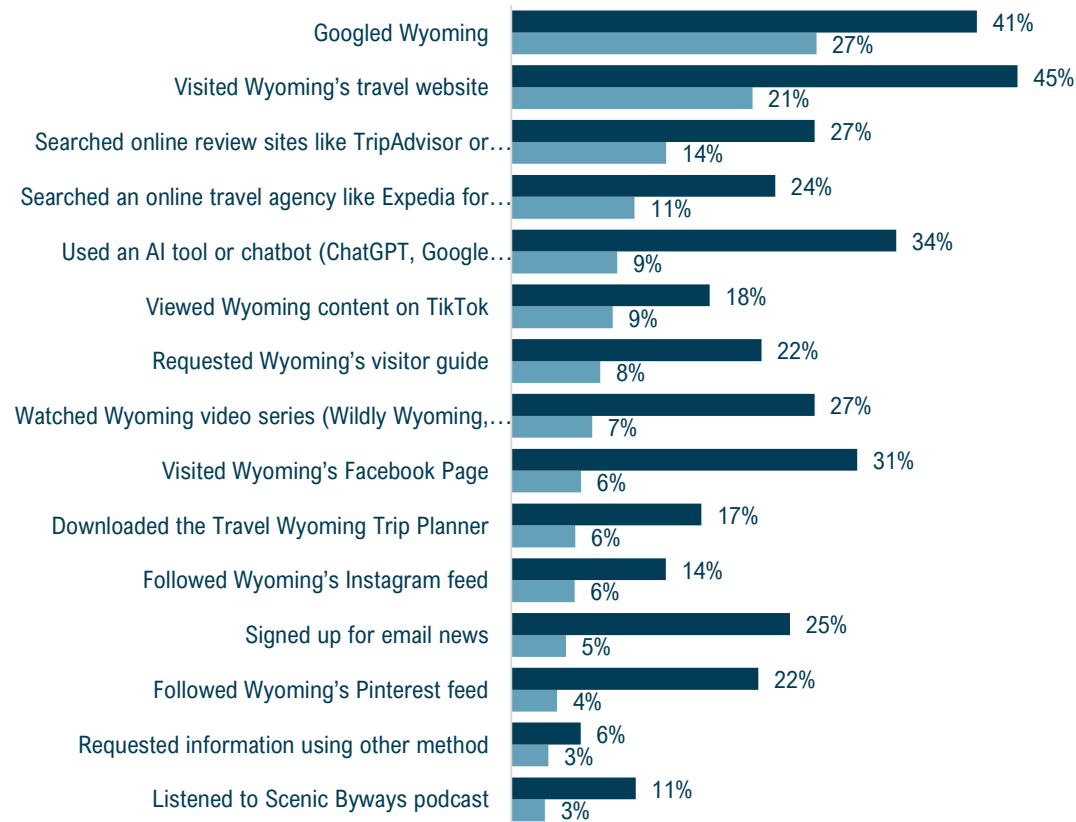
Destination Ratings Attributes	Wyoming	Colorado	Idaho	Montana	South Dakota	Texas	Utah	Nebraska
Is where the Old West lives on	3.96	3.43	3.47	3.97	3.61	3.69	3.34	3.30
Has interesting historical sites and museums	3.88	3.87	3.66	3.95	3.82	3.98	3.69	3.53
Is a place to discover American Indigenous People's culture	3.89	3.58	3.54	3.88	3.75	3.42	3.46	3.41
Is great for a winter destination	3.59	4.04	3.56	3.66	3.34	3.43	3.73	3.10
Is an easy to get to destination	3.60	3.80	3.50	3.55	3.52	3.78	3.61	3.52
Is a good place for family vacations	3.97	4.09	3.73	4.00	3.80	3.82	3.72	3.56
Is a good value for the money	3.80	3.59	3.71	3.78	3.68	3.73	3.55	3.56
Is a good year-round destination	3.55	3.85	3.51	3.62	3.36	3.85	3.64	3.28
Provides a variety of dining choices	3.68	3.97	3.59	3.72	3.61	4.12	3.65	3.51
Makes me feel welcome	3.81	3.92	3.60	3.85	3.70	3.69	3.49	3.59
Is accepting and inclusive	3.64	3.83	3.45	3.66	3.56	3.52	3.37	3.47
Is a place that accommodates people with physical disabilities	3.45	3.56	3.44	3.55	3.46	3.58	3.40	3.45
Is a place with a bold spirit	3.91	3.91	3.61	3.96	3.67	3.94	3.53	3.45
Ignites curiosity and learning	3.87	3.90	3.60	3.95	3.74	3.72	3.61	3.47
Has a vitality to it	3.81	3.88	3.61	3.93	3.67	3.78	3.52	3.48

\* For table with indexes instead of raw means see appendix.

# Owned and Shared Media

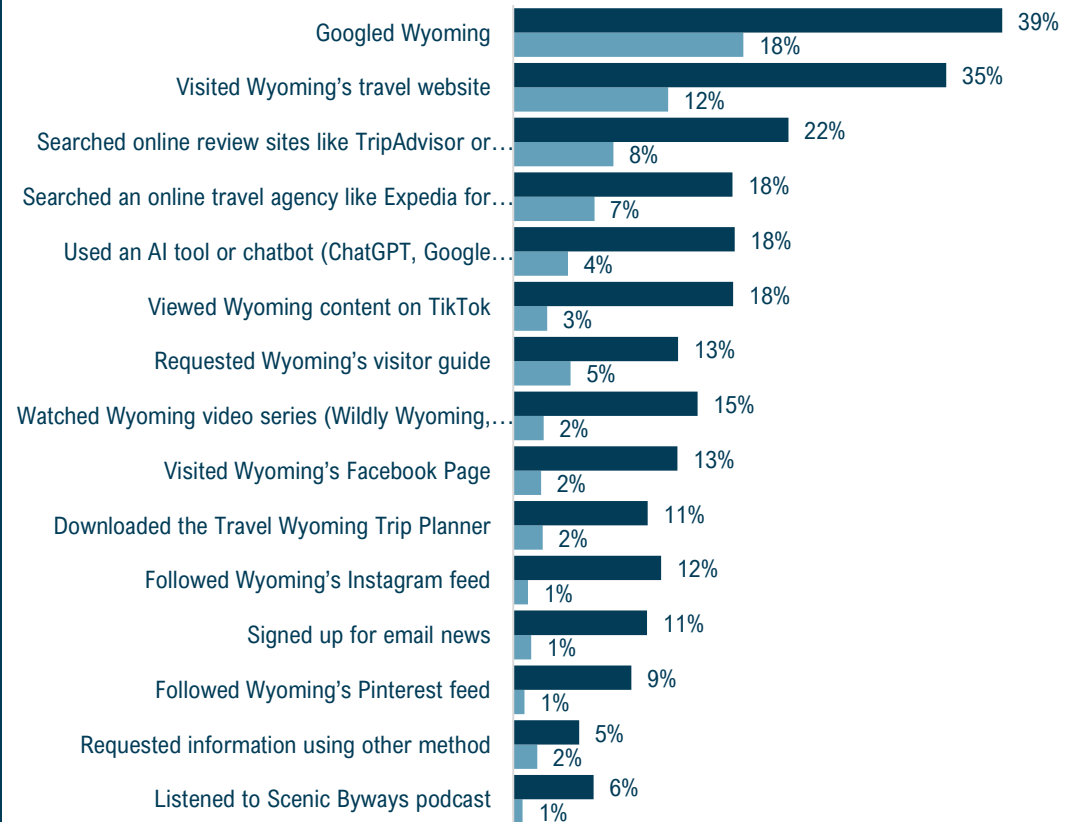
## Visitation and Paid Media Impact on Usage Rates

Owned & Shared Media Usage Rates by Visitor Status



■ Visitor ■ Non Visitor

Owned & Shared Media Usage Rates by Paid Media Awareness



■ Aware ■ Unaware

# Travel Increment & ROI

# Incremental Travel Overview

- 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 area would see without the marketing campaign. Accordingly, any travel above that base by ad-aware households is what is considered influenced. As such, this is a conservative measure of influence.

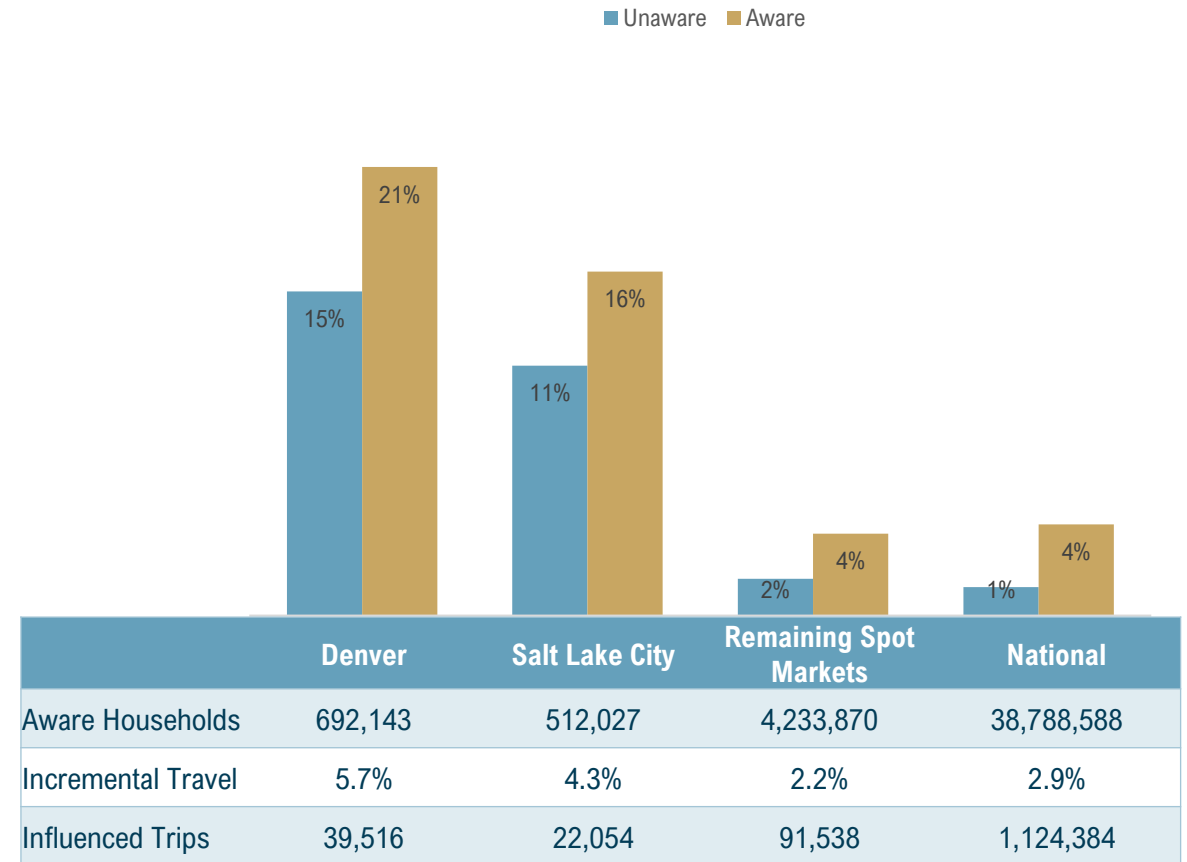




# Influence by Market

- There are significant differences in the base rate of travel to Wyoming from the nearby markets. Often, it is difficult to generate lift when there is a strong unaware rate of travel. However, Denver and Salt Lake City have the strongest lift, generating more than 60,000 trips.
- Given most of the target population is in the national market, more than 1 million trips are generated from outside of the targeted spot markets.

Incremental Travel by Market



# Influenced Spending and ROI

- There are considerable differences in spending by target market, with the nearby markets of Denver and Salt Lake spending considerably less than other influenced visitors. However, the remaining spot markets behave similarly to other national consumers in terms of spending.
- With higher average spending, especially by aware visitors in distant markets, the 2025 campaign influenced more visitor spending than any other WOT campaign at \$1.6 billion in visitor spending.
- While there are slightly fewer influenced trips than in 2024, there is more influenced visitor spending. Increases in spending are partially attributable to higher prices due to inflation in recent years, but this still results in more in-destination spending.
- Overall, nearly \$65 million in taxes were collected due to influenced visitor spending, more than double that of the initial post-COVID year, 2021.

	Influenced Trips	Aware Trip Spending	Influenced Visitor Spending
Denver	39,516	\$743	\$29,354,535
Salt Lake City	22,054	\$852	\$18,799,705
Remaining Spot	91,538	\$1,237	\$113,252,943
National	1,124,384	\$1,299	\$1,460,574,593
<b>Total</b>	<b>1,277,492</b>	<b>\$1,270</b>	<b>\$1,621,981,776</b>

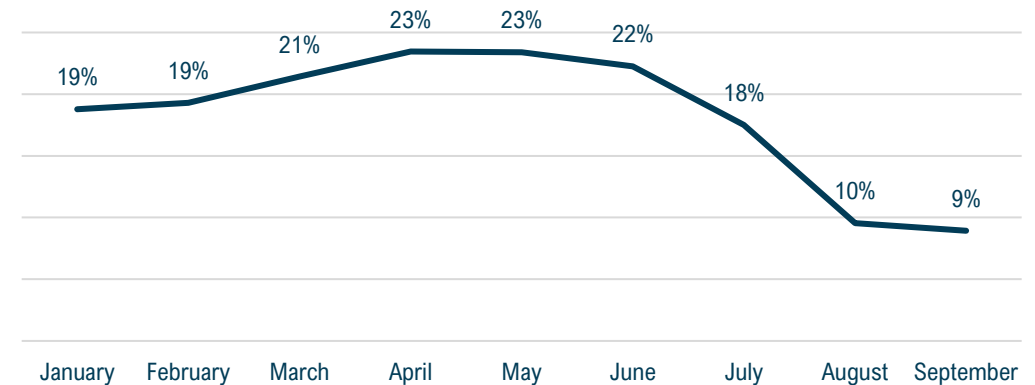
Campaign impact	2021	2022	2023	2024	2025	YOY Change
Total influenced trips	626,667	1.03M	1.17M	1.31M	1.28M	-2%
Influenced visitor spending	\$720.82M	\$1.21B	\$1.35B	\$1.44B	\$1.62B	13%
Ad spending	\$3.75M	\$3.60M	\$5.18M	\$4.6M	\$5.0M	9%
<b>ROI</b>	<b>\$192</b>	<b>\$336</b>	<b>\$260</b>	<b>\$284</b>	<b>\$322</b>	13%
Taxes generated	\$28.9M	\$48.5M	\$53.9M	\$57.9M	\$64.9M	12%
<b>Tax ROI</b>	<b>\$7.70</b>	<b>\$13.50</b>	<b>\$10.39</b>	<b>\$11.61</b>	<b>\$12.86</b>	11%

# Trip Specifics

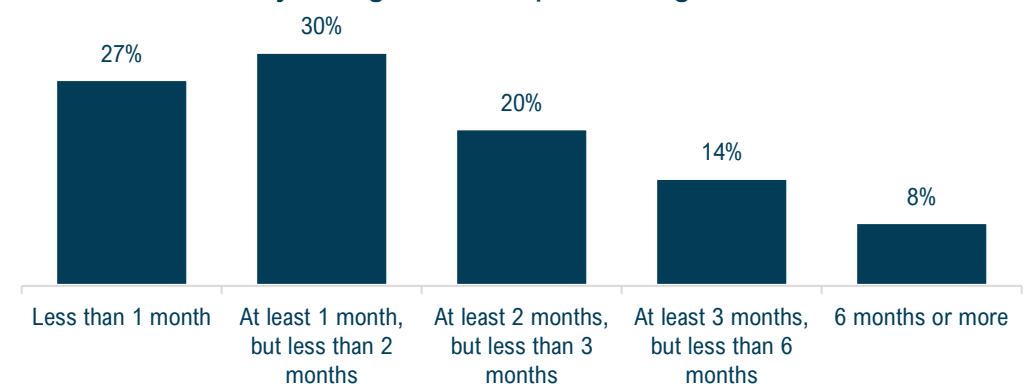
# Visitation and Planning Period

- During the ROI wave, SMARInsights tracks visitation primarily to calculate incremental travel, a key component of the ROI calculation. At the same time, this wave provides valuable insights into a variety of behaviors and characteristics of known visitors. Travel is measured during the final wave of research to allow sufficient time for those influenced by marketing efforts to actually complete a trip to the destination.
- The visitation chart indicates that travel rates rise slightly during the late spring and early summer months before showing a dramatic decline. In practice, this decline is less severe than it appears; the sharper drop is largely due to the greater difficulty in capturing the most recent trips rather than an actual falloff in visitation.
- More than 50% of visitors reported that they planned their trip to Wyoming less than 2 months before visiting the state. Fewer than 10% of visitors took an extended planning period of 6+ months.

Respondent Travel to Wyoming by Month



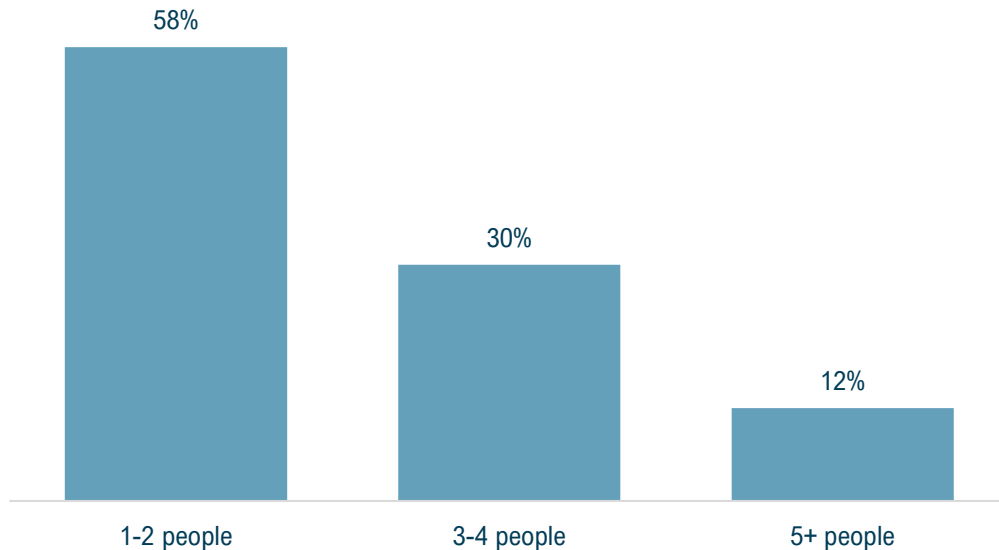
Wyoming Visitor Trip Planning Period



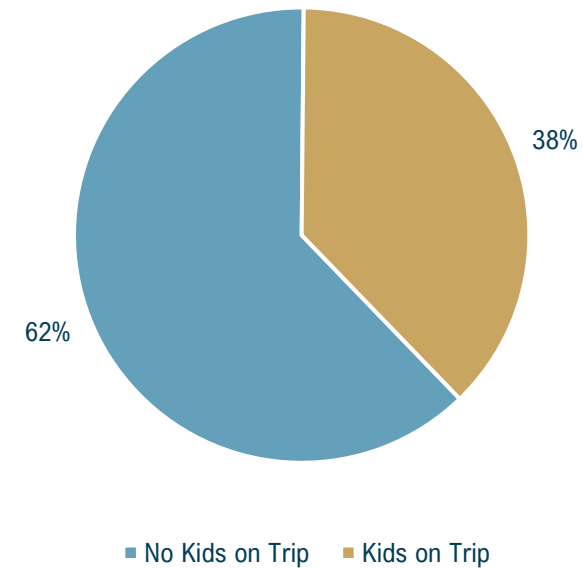
# Party Size + Kids

- The overall average party size for trips to Wyoming was 2.83 people. Nearly 60% of trips were made up of 1-2 people, while just 12% included a group of five or more people.
- Of all the reported trips, 38% brought at least one individual under the age of 18.

Average Party Size

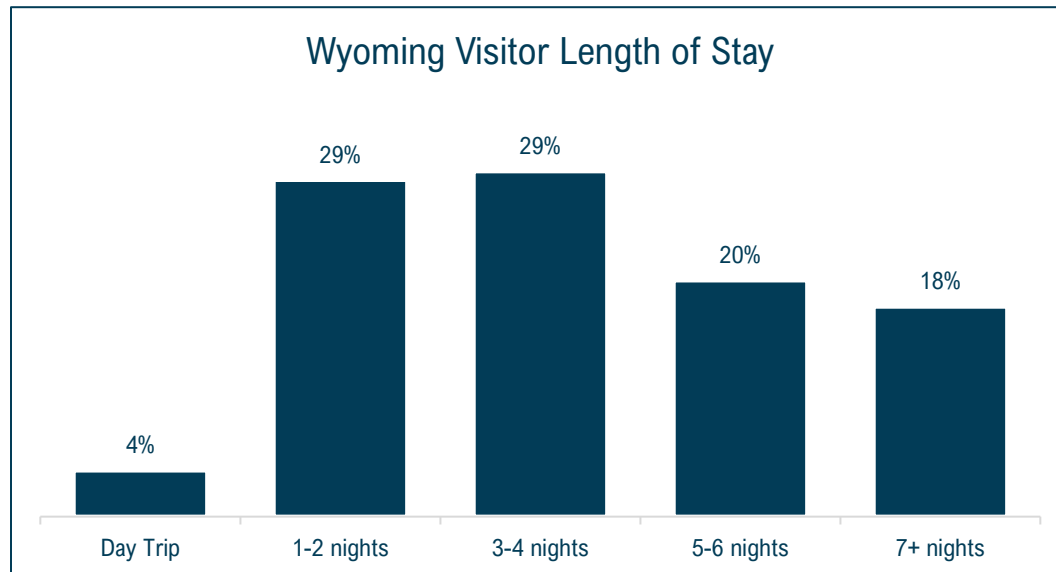


% Visitors with Kids on Trip

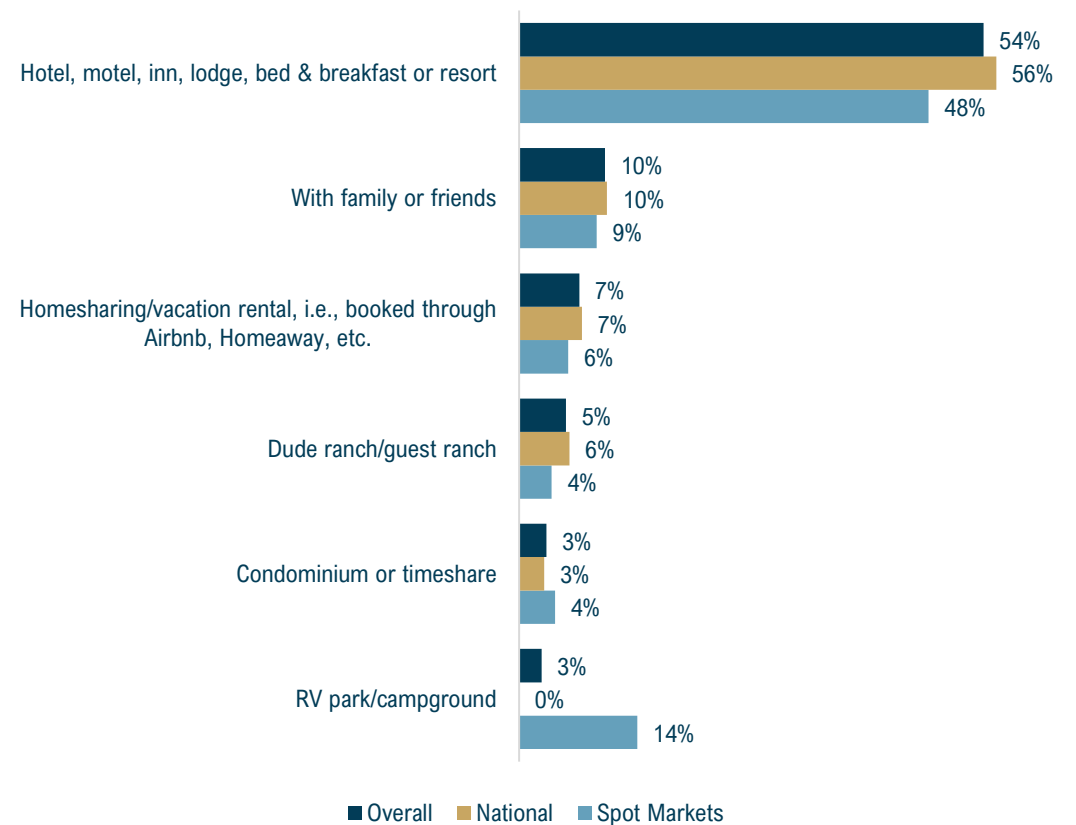


# Length of Stay + Lodging

- The overall average length of stay was 4 nights. 38% of visitors reported staying longer than this with 18% staying for 7+ nights.
- More than half of Wyoming travelers stayed in a *hotel or resort* during their trip. The next most frequent lodging types were staying *with family or friends* (10%) and *home share options* (7%).



## Lodging Type Usage Rates



# Average Trip Spend

## Overall

- The overall average trip spend was \$1,100, with over one-third of the spending coming from spend on lodging.
- Despite unaware respondents spending more on lodging, those aware of the “That’s WY” campaign spent nearly \$400 more per trip than those who reported being unaware of the campaign.
  - Aware consumers reported significantly higher spending in areas such as entertainment, shopping, and other discretionary categories, signaling that the creative helps drive spending beyond essential needs.

	Overall	Unaware	Aware
Lodging/accommodations	\$435	\$465	\$420
Meals/food/groceries	\$207	\$165	\$228
Entertainment/attractions	\$123	\$60	\$153
Shopping	\$155	\$48	\$208
Entertainment such as shows, theater or concerts	\$46	\$11	\$63
Transportation while in Wyoming	\$111	\$85	\$124
Other	\$24	\$11	\$30
<b>Total</b>	<b>\$1,100</b>	<b>\$844</b>	<b>\$1,226</b>



# Average Trip Spend

## National vs Spot

- National market visitors reported spending nearly \$400 more than spot market visitors on average.
  - The difference between market groups was driven by differences in essential needs such as lodging and food.
- As both average party size and average length of stay are nearly identical when comparing national and spot markets, the difference in lodging spend can be the difference in lodging preferences by market group.
  - Among spot market visitors, 14% reported staying at an RV park or campground, compared to 0% of national market visitors. While it is likely that some national market visitors do use this type of lodging but were not captured in the survey, the results suggest a general trend.
  - In general, trips that involve camping (RV or tent) tend to generate lower spending on activities such as dining, shopping, and entertainment, which is reflected in the spending data.

	National	Spot Markets
Lodging/accommodations	\$476	\$295
Meals/food/groceries	\$218	\$171
Entertainment/attractions	\$136	\$79
Shopping	\$168	\$110
Entertainment such as shows, theater or concerts	\$51	\$29
Transportation while in Wyoming	\$119	\$85
Other	\$23	\$26
<b>Total</b>	<b>\$1,191</b>	<b>\$794</b>

# Trip Activities

## Overall – Participation & Motivators

- Activities related to exploring the natural scenery and sites that Wyoming has to offer received the highest rates of participation.
- Despite not having the highest rates of participation visiting the national parks, Yellowstone and Grand Teton, visiting these destinations was a key motivator for 65% and 74% of trips that included these outdoor activities.
- Niche outdoor activities such as golfing, horseback riding, snow skiing/boarding, hunting, and boating were very frequently reported as key motivators despite lower levels of participation.

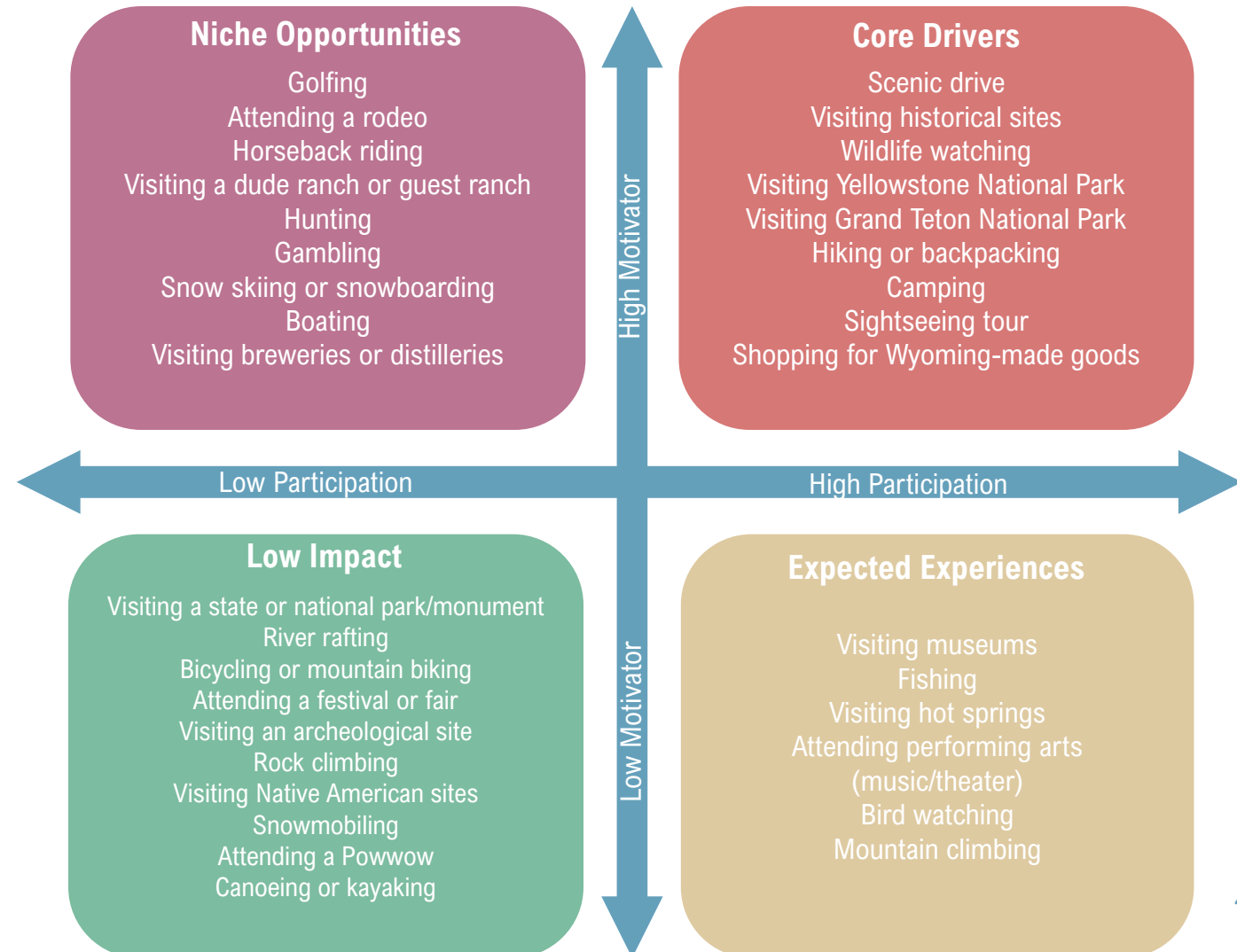
	Participation	Motivation	Net Motivator
Scenic drive	37%	49%	18%
Visiting historical sites	30%	63%	19%
Wildlife watching	28%	47%	13%
Visiting Yellowstone National Park	28%	65%	18%
Visiting Grand Teton National Park	24%	74%	18%
Hiking or backpacking	23%	42%	10%
Visiting museums	23%	33%	7%
Camping	21%	49%	10%
Sightseeing tour	21%	46%	9%
Shopping for Wyoming-made goods	20%	50%	10%
Fishing	19%	40%	8%
Visiting hot springs	19%	18%	3%
Attending performing arts (music/theater)	18%	26%	5%
Bird watching	18%	23%	4%
Mountain climbing	16%	24%	4%
Visiting a state or national park/monument	16%	28%	4%
River rafting	14%	27%	4%

	Participation	Motivation	Net Motivator
Golfing	14%	52%	7%
Bicycling or mountain biking	13%	5%	1%
Attending a festival or fair	12%	32%	4%
Visiting an archeological site	12%	24%	3%
Attending a rodeo	12%	53%	6%
Rock climbing	11%	32%	4%
Horseback riding	11%	52%	6%
Visiting a dude ranch or guest ranch	10%	40%	4%
Hunting	10%	50%	5%
Gambling	10%	54%	5%
Visiting Native American sites	9%	25%	2%
Snow skiing or snowboarding	9%	66%	6%
Snowmobiling	9%	20%	2%
Boating	9%	44%	4%
Attending a Powwow	6%	27%	2%
Visiting breweries or distilleries	6%	58%	3%
Canoeing or kayaking	6%	26%	1%

# Trip Motivators and Participation

## Quadrant Analysis

- The following graphic shows which activities people participate in while on their trip to Wyoming, as well as which activities motivated them to travel to Wyoming.
- Quadrant description:
  - Core Drivers: These activities strongly motivate travel and are frequently experienced.
  - Expected Experiences: These are commonly participated in but are not major travel motivators
  - Niche Opportunities: These activities motivate travel but are not frequently experienced.
  - Low Impact: These activities neither strongly motivate travel nor are they widely participated in



# Appendix

# Destination Ratings Historical



SMARInsights Destination Ratings Benchmarks

Destination Ratings Attributes	2025	2024	2023	2022	2021	2020	2019	2018	2017	2016	2015	2014
Offers abundant outdoor recreation options	4.16	4.14	4.18	4.13	4.19	4.27	4.05	4.04	4.14	4.02	3.98	3.92
Offers great camping and RVing options	4.04	3.98	4.02	3.97	4.08	4.15	3.95	3.90	3.95	3.87	3.78	3.78
Is a place to have new experiences	4.05	4.10	4.13	4.07	4.04	4.11	4.00	3.96	3.97	3.71	3.52	3.61
Is a good place for family vacations	3.97	3.96	3.98	3.93	3.99	4.09	3.89	3.88	3.88	3.71	3.61	3.68
Is where the Old West lives on	3.96	3.89	3.88	3.86	3.91	3.88	3.75	3.75	3.78	3.66	3.64	3.60
Has interesting historical sites and museums	3.88	3.90	3.93	3.84	3.91	3.93	3.82	3.75	3.77	3.57	3.51	3.51
Is a place to discover American Indian culture	3.89	3.88	3.88	3.88	3.81	3.85	3.79	3.73	3.79	3.66	3.46	3.55
Is a good value for the money	3.80	3.74	3.78	3.78	3.77	3.92	3.75	3.66	3.67	3.60	3.53	3.52
Is great for a winter destination	3.59	3.56	3.56	3.57	3.56	3.31	3.44	3.47	3.41	3.57	3.50	3.46
Is a good place for a road trip	3.99	3.96	3.97	3.97	4.06	4.09	3.87	3.85			3.63	3.70
Is home to Yellowstone National Park	4.24	4.15	4.21	4.21	4.31	4.33	4.07	4.11	4.09			
Has exceptional wildlife viewing	4.19	4.16	4.23	4.18	4.24	4.33	4.11	4.04	4.15			
Has diverse natural landscapes and scenery	4.17	4.16	4.18	4.14	4.20	4.23	4.07	4.00	4.12			
Where I can find adventure	4.07	4.04	4.10	4.04	4.04	4.02	3.95	3.94	3.92			
Is a place to experience cowboy culture	4.03	3.98	4.04	3.97	4.09	4.06	3.86	3.88	3.92			
Makes me feel welcome/welcoming to all	3.81	3.82	3.75	3.79	3.78	4.00	3.85	3.84	3.85			
Provides a variety of dining choices	3.68	3.68	3.61	3.65	3.61	3.57	3.59	3.54	3.53			
Is an easy to get to destination	3.60	3.49	3.48	3.53	3.80	3.82	3.44	3.42	3.30			
Is a good year-round destination	3.55	3.53	3.54	3.55	3.51	3.34	3.41	3.37	3.36			
Has wide-open roads to explore	4.12	4.10	4.12	4.12	4.20	4.50	4.03	3.97				
Travel is safe and accessible			3.90	3.92	3.90	3.89	3.90	3.86	3.87			

# Communication Ratings

## Historical

>= 4.2  
Excellent  
(Top 10%)

4.19 – 4.00  
Good  
(Top 25%)

3.99 – 3.80  
Average

< 3.79  
Below  
Average

SMARInsights Communication Ratings Benchmarks

Communication Ratings	2025	2024	2023	2022	2021	2019	2018	2017	2016	2015	2014	2013	2012	2010	2009	2008	2007	2006
To escape to the comfort of the wide open spaces	4.26	4.24	4.32	4.22	4.37	4.26	4.08	4.19	4.25	4.23	3.99	4.10	4.00	4.23	4.17	4.35	4.20	3.81
Where I can indulge a passion for the great western outdoors	4.20	4.22	4.30	4.20	4.23	4.18	4.04	4.14	4.20	4.32	4.04	4.10	4.10	4.25	4.23	4.38	4.25	3.77
Where I can enrich and expand my understanding of Western lore and culture	4.24	4.18	4.23	4.14	4.01	4.08	3.94	4.05	4.03	3.94	3.66	3.80	3.70	4.16	4.07	4.21	4.05	3.79
Where I can seek adventure, do something I've never done before					4.25	4.23	4.10	4.17	4.18	4.18	3.94	4.00	4.00	4.14	4.13	4.26	4.10	3.73
To relax in peace and quiet					4.35	4.27	4.10	4.17	4.24	4.10	3.79	3.90	3.90	4.10	4.18	4.26	4.15	3.60
With vast, diverse landscapes full of endless natural beauty	4.36	4.36	4.43	4.34	4.45	4.40	4.22	4.33	4.37									
Where I feel a sense of freedom and release	4.19	4.21	4.27	4.15	4.30	4.24	3.99	4.11	4.16									
To take the great American road trip west										4.06	3.84	3.90	3.80	4.17	4.11	4.25	4.10	3.82
Where I could enjoy the authentic western adventure										4.05	3.83	3.90	3.80	4.17	4.11	4.29	4.10	3.80
Where I can reconnect with my family and enjoy simple pleasures	4.00	3.99	3.98	3.89	4.08	4.08	3.81	3.91	3.94									
To experience and experiment with new places and things										4.10	3.82	3.90	3.80	4.10	4.06	4.21	4.00	3.69
Where I am encouraged to travel responsibly	3.98	3.95	4.06	3.86	3.94													
Where I can be a bold explorer	4.17	4.16	4.23	4.14														
Where people possess great determination and grit	4.08	4.08	4.09	4.04														
Where I can learn new things and grow as a person	4.11	4.09	4.08	4.00														
Where I can unplug and focus on personal wellness	4.06	4.10	4.10															
Where my family and I can challenge ourselves and try new things	4.09	4.08																

# Impact Ratings

## Historical

**>= 4.0**  
Excellent  
(Top 10%)

**3.9 – 3.99**  
Good  
(Top 25%)

**3.7 – 3.89**  
Average

**< 3.7**  
Below  
Average

### SMARInsights Impact Ratings Benchmarks

Impact Ratings	2025	2024	2023	2022	2021	2019	2018	2017	2016	2015	2014	2013	2012	2010	2009	2008	2007	2006
Visit the state	3.80	3.81	3.85	3.70	3.83	3.83	3.58	3.72	3.80	3.77	3.59	3.50	3.40	3.63	3.66	3.80	3.65	3.45
Want to learn more about things to see and do in the state	3.81	3.80	3.85	3.68	3.77	3.72	3.55	3.70	3.79	3.70	3.55	3.50	3.40	3.59	3.60	3.72	3.55	3.45
Go to the state website, TravelWyoming.com	3.55	3.56	3.54	3.42	3.48	3.46	3.34	3.47	3.56	3.49	3.35	3.30	3.20	3.36	3.39	3.53	3.45	3.35
Talk to friends and family about Wyoming	3.49	3.47	3.47	3.35	3.42	3.39	3.27											
Order or download a Wyoming visitor guide	3.34	3.36	3.31	3.20	3.29	3.26	3.27											
Watch videos and/or view pictures of Wyoming	3.66	3.60	3.63	3.46	3.53	3.53												
Talk about or share Wyoming information online	3.22	3.22	3.19	3.07	3.09	3.11												
Follow Wyoming social media	3.06	3.09	3.04	2.91	2.93	2.96												
Sign up for Wyoming emails	2.99	3.02	2.93	2.86	2.89	2.94												

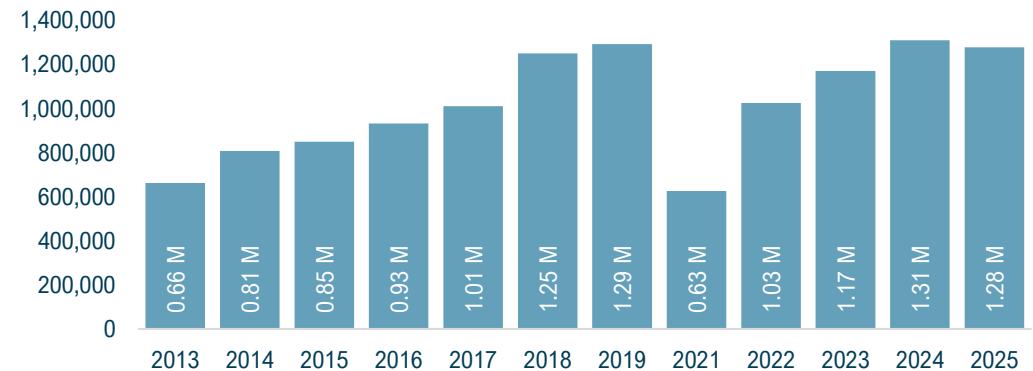


# Influenced Trips & Visitor Spending

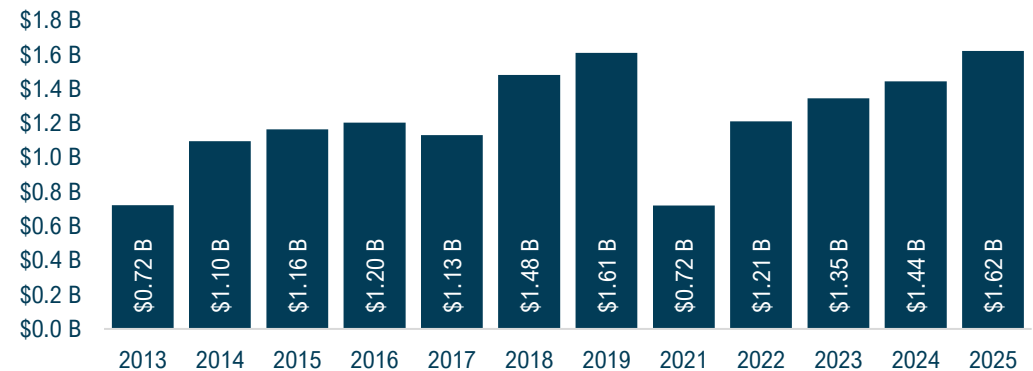
## Historical

	Ad Influenced Trips	Influenced Visitor Spending
2013	661,798	\$722,683,566
2014	808,132	\$1,095,019,383
2015	850,412	\$1,164,213,985
2016	931,809	\$1,202,965,419
2017	1,011,635	\$1,131,007,930
2018	1,250,120	\$1,482,642,320
2019	1,293,172	\$1,610,000,000
2021	626,667	\$720,667,050
2022	1,025,911	\$1,210,574,980
2023	1,171,210	\$1,345,468,337
2024	1,310,081	\$1,444,811,388
2025	1,277,492	\$1,621,981,776

Ad Influenced Trips



Influenced Visitor Spending

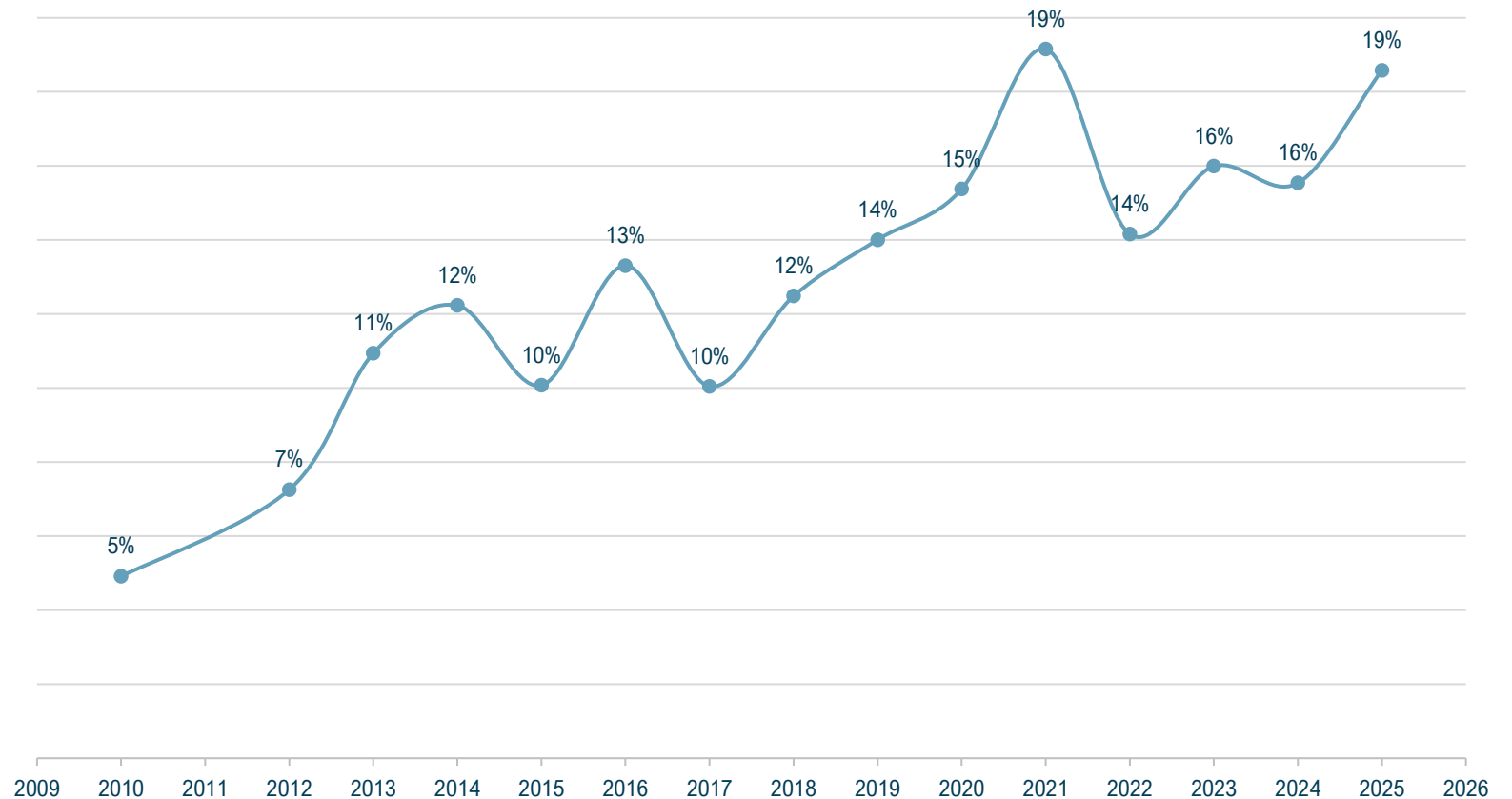


# Likelihood to Visit Wyoming

## Historical

	Likelihood to Visit
2025	19%
2024	16%
2023	16%
2022	14%
2021	19%
2020	15%
2019	14%
2018	12%
2017	10%
2016	13%
2015	10%
2014	12%
2013	11%
2012	7%
2010	5%

Likelihood to Visit Wyoming in the next 12 Months

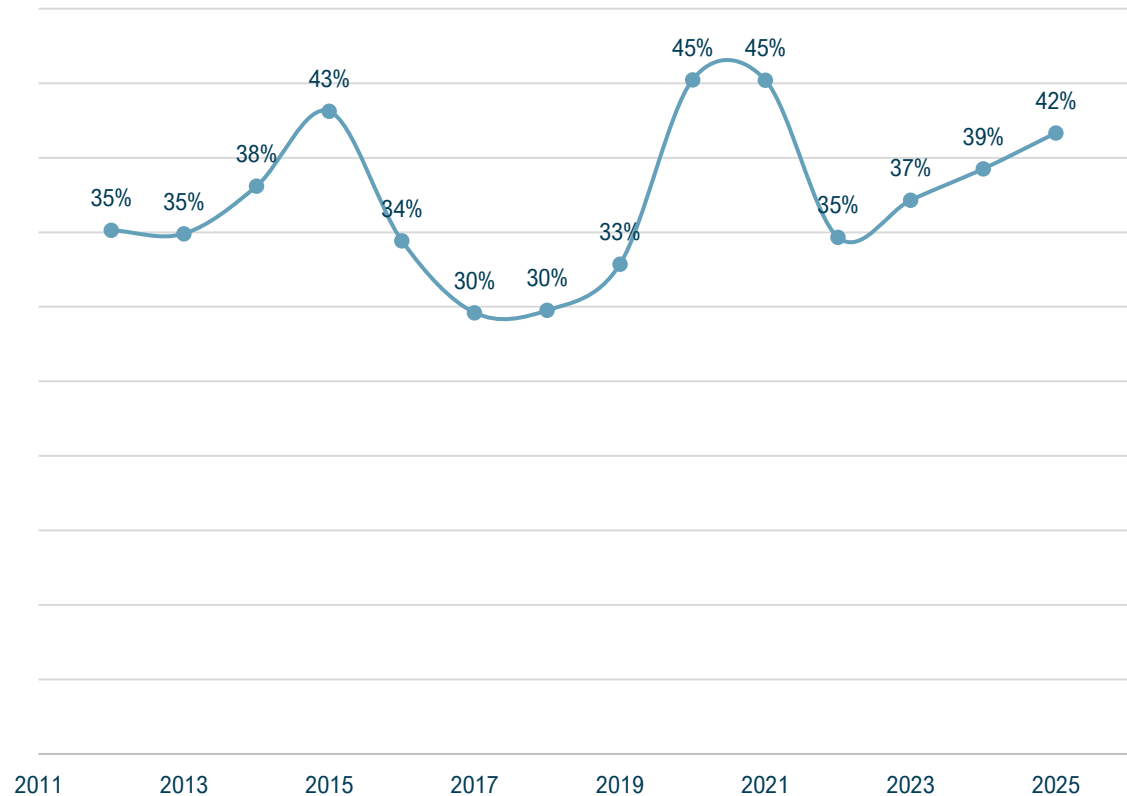


# Wyoming Familiarity

## Historical

Year	Not at all Familiar	Not Very Familiar	Somewhat Familiar	Very Familiar	Top 2 Box
2025	29%	29%	28%	13%	42%
2024	31%	30%	29%	11%	39%
2023	31%	32%	27%	10%	37%
2022	36%	29%	25%	10%	35%
2021	26%	29%	33%	12%	45%
2020	24%	31%	33%	13%	45%
2019	37%	30%	23%	9%	33%
2018	42%	28%	20%	10%	30%
2017	43%	28%	22%	7%	30%
2016	35%	31%	26%	8%	34%
2015	29%	28%	32%	11%	43%
2014	33%	29%	27%	11%	38%
2013	31%	34%	26%	9%	35%
2012	31%	34%	26%	9%	35%

Familiarity of Wyoming  
(Top 2 Box)



# Questionnaire

## Wyoming Travel & Tourism 2025 Advertising Effectiveness

S1a. What is your ZIP code? \_\_\_\_\_

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

- Me  
Me and my spouse/partner  
My spouse/partner ->TERMINATE

S1. [SCREENER GRID] Please indicate which of the following describe you. Select all that apply.

[ROTATE]	Yes	No
I regularly use social media like Facebook, X, Instagram, or TikTok		
I normally take at least one leisure trip a year that involves an overnight stay or is at least 50 miles from home		TERMINATE AFTER SCREENING QUESTIONS IF NO TO BOTH
I am currently planning or have already planned an upcoming leisure trip		
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 Prime Video, Disney+, AppleTV+, Netflix, Max, or Hulu		

Age. What is your age? \_\_\_\_\_ TERMINATE IF UNDER 18

Q1A. If you could take a leisure trip to a place in the U.S. that is filled with exploring the great outdoors, a sense of rugged camaraderie and the American West, where would you go?  
\_\_\_\_\_

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
[INSERT COMPETITIVE SET]				

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
[INSERT COMPETITIVE SET]					

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

[ROTATE]	Visited in 2025	Visited 1-5 years ago	Visited more than 5 years ago	Have never visited
[INSERT COMPETITIVE SET]				

Q3X. How would you rate each of the following states as a place to visit for a leisure trip?

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[ROTATE]	Poor	Fair	Good	Very Good	Excellent
[INSERT COMPETITIVE SET]					

[HAVE THEM RATE WYOMING AND ONE OTHER STATE.  
PRIORITY FOR RATING: FAMILIARITY Q1\_STATE>1]

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. [ATTRIBUTES IN YELLOW HAVE BEEN TRACKED SINCE 2006]

[RANDOMIZE]	Not at all	2	3	4	Completely describes
Is home to Yellowstone National Park					
Has diverse natural landscapes and scenery					
Is where the Old West lives on					
Offers great camping and RVing options					
Has interesting historical sites and museums					
Is a place to discover American Indigenous People's culture					
Offers abundant outdoor recreation options					
Is a place to experience cowboy culture					
Has exceptional wildlife viewing					
Is great for a winter destination					
Is a place to have new experiences					
Where I can find adventure					
Is an easy to get to destination					
Is a good place for family vacations					
Is a good value for the money					
Is a good year-round destination					
Provides a variety of dining choices					
Is a good place for a road trip					
Has wide-open roads to explore					
Makes me feel welcome					
Is accepting and inclusive					
Is a place that accommodates people with physical disabilities					
Is a place with a bold spirit					

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Ignites curiosity and learning					
Has a vitality to it					
Offers leisure activities for all levels					

Q5 [EARNED MEDIA]. Since January 2025, please indicate if you saw any articles or stories related to the following. Select all that apply.

[ROTATE]
Wyoming Celebrates its Women's Voting History (AFAR)
<i>Raging Southeast Wyoming, the Cowboy State</i> (Forbes)
Cody, Wyoming, is a Winter Wonderland for Adventurers (Cowboys & Indians)
<i>People and Places That Make Wyoming Special</i> (Forbes)
None of these

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

Googled Wyoming
Requested Wyoming's visitor guide
Visited Wyoming's travel website
Downloaded the Travel Wyoming Trip Planner
Signed up for email news
Watched Wyoming video series (Wildly Wyoming, Howdy Neighbor, etc.)
Visited Wyoming's Facebook Page
Followed Wyoming's Pinterest feed
Followed Wyoming's Instagram feed
Viewed Wyoming content on TikTok
Searched an online travel agency like Expedia for Wyoming information
Searched online review sites like TripAdvisor or Yelp for Wyoming information
Listened to Scenic Byways podcast
Requested information using other method [ANCHOR]
Used an AI tool or chatbot (ChatGPT, Google Gemini, Copilot) to generate ideas or an itinerary
None of these

IF Q3==1, SKIP TO Q.

Q8. When did you visit Wyoming in 2025? Select all that apply.

January
February
March
April
May
June
July
August

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# Questionnaire

September

Q8x. [ASK FOR EARLIEST DATE INDICATED IN Q8] Was your [INSERT MONTH] your first trip to Wyoming? YES/NO

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

[ASK ABOUT ONLY 1 TRIP. IF MULTIPLE TRIPS CHOSEN AT Q7, USE THIS PRIORITY TO CHOOSE WHICH TO FOLLOW UP ON: –

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

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 enter the number in your travel party who fall into the categories 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]

Q17. What method of transportation did you use to travel to Wyoming on your [INSERT MONTH OF YEAR OF MAIN TRIP] trip?

- Drove via car, van, truck or SUV  
Drove via RV  
Flew/airplane into Wyoming or a nearby state  
Bus or motor coach trip

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Motorcycle  
Other, please specify \_\_\_\_\_

Q18. How many nights did you spend in Wyoming during your [INSERT MONTH AND YEAR OF MAIN TRIP] 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/Guest ranch	
RV park/campground	
Homeshaing/vacation rental, i.e., booked through Airbnb, Homeaway, etc.	
Condominium or timeshare	
With family or friends	
Total nights [AUTO-CALCULATE]	

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

Hiking or backpacking	Visiting Grand Teton National Park
Visiting a state or national park/monument	Visiting Native American sites
Bicycling or mountain biking	Attending a Powwow
Mountain climbing	Attending a festival or fair
Rock climbing	Attending performing arts (music/theater)
Horseback riding	Visiting historical sites
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 or guest ranch
Fishing	Visiting hot springs
Visiting museums	Shopping for Wyoming-made goods
Visiting breweries or distilleries	Gambling
Attending a rodeo	Other, please specify _____
Visiting Yellowstone National Park	None of these

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[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.

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	_____

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

- Facebook  
X  
Instagram  
YouTube  
Pinterest  
TikTok  
Other social media  
Blogs  
None of these

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

- Excellent  
Very good  
Good  
Fair  
Poor

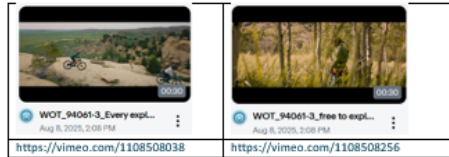
Next you will be shown a variety of types of advertisements. Some advertisements will include sound so please adjust your volume to a comfortable level. Please review each ad carefully and answer the questions that follow. [ROTATE MEDIA AND ADS WITHIN MEDIA]

1: Ads Master Wyoming Wyoming 2025 Video Video

Explore

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# Questionnaire

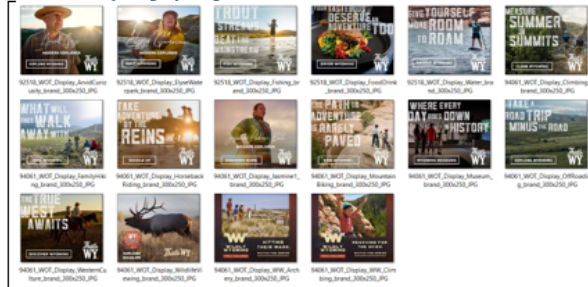


VIDEO. How many times have you seen this video ad?

Never  
Once  
Two or three times  
More than three times

## BANNER ADS

I:\Ads Master\Wyoming\Wyoming 2025\Banners\Animated Banners\Animated



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Break into 3 groups

BANNER. Have you seen these ads before.

PRINT  
I:\Ads Master\Wyoming\Wyoming 2025\Print\Print



PRINT. Have you seen these ads before?

RADIO  
I:\Ads Master\Wyoming\Wyoming 2025\Audio\Audio



RADIO. Please indicate if you have heard any of these ads or ads like them for Wyoming before.

SOCIAL  
I:\Ads Master\Wyoming\Wyoming 2025\Social\Social  
GROUP ALL



SOCIAL. Have you seen these ads before?

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

Adreact. What is your overall reaction to the ads you just viewed?

Positive Neutral Negative

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Q22a. Now please indicate how much you agree that all the ads you have just seen for Wyoming show a place... [ATTRIBUTES IN YELLOW HAVE BEEN TRACKED SINCE 2006]

[ROTATE]	Strongly disagree	2	3	4	Strongly agree
With vast, diverse landscapes full of endless natural beauty					
Where I can be a bold explorer					
Where I can learn new things and grow as a person					
Where I can reconnect with my family and enjoy simple pleasures					
Where I can indulge a passion for the great western outdoors					
To escape to the comfort of the wide open spaces					
Where I can enrich and expand my understanding of Western lore and culture					
Where I feel a sense of freedom and release					
Where I am encouraged to travel responsibly					
Where people possess great determination and grit					
Where I can unplug and focus on personal wellness					
Where my family and I can challenge ourselves and try new things					

Q22b. How much do you agree that this campaign makes you want to...?

[ROTATE]	Strongly disagree	2	3	4	Strongly agree
Learn more about things to see and do in the state					
Go to the state website, TravelWyoming.com					
Order or download a Wyoming visitor guide					
Visit the state					
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

Q23. [ASK OF THOSE AWARE OF ANY AD] Now, thinking about your experience with the ads before this survey, how much do you agree that...?

ROTATE	Strongly disagree	Disagree	Neutral	Agree	Strongly agree

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# Questionnaire

I know these ads really well	1	2	3	4	5
I always enjoy seeing these ads	1	2	3	4	5
I have seen these ads so many times that I am tired of them	1	2	3	4	5
I find the ads engaging	1	2	3	4	5
The ads are truly memorable	1	2	3	4	5

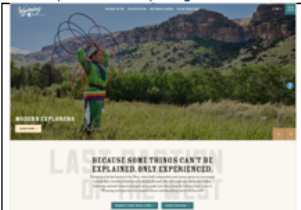
ADreact2. [ASK IF ADreact IS NEGATIVE; ASK] Earlier, you said you had a negative reaction to these ads. Why do you feel that way? \_\_\_\_\_

Q6A. Have you seen this Wyoming travel guide? YES/NO



I:\Ads Master\Wyoming\Wyoming 2025\Website and TGs\ 2025-OTG-Photos-024-medium.jpg

7b. Have you seen this Wyoming website? YES/NO



I:\Ads Master\Wyoming\Wyoming 2025\Website and TGs\website2.jpg

## DEMOGRAPHICS

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

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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

ethnicity1. Which of the following best describes your ethnic heritage? Are you...? Select all that apply.  
[ALLOW MULTI]  
African-American/Black  
Asian  
American Indian or Alaska Native  
Caucasian/White  
Hispanic/Latino  
Middle Eastern or North African  
Native Hawaiian or Other Pacific Islander

Other, please specify  
Gender. Do you identify as...?  
Male  
Female  
Non-conforming/Non-binary  
Prefer not to answer

orientation. Do you identify as LGBTQIA+ or travel regularly with someone who does?  
Yes  
No  
Prefer not to answer

Disability. Do you have a physical disability or travel regularly with someone who does? YES/NO

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Thank Screen –  
[Before Vendor ending]

Thank you for taking the time to complete this survey.

Explore Wyoming!

*That's WY*

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<https://travelwyoming.com/>

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