Wyoming Tourism
2008 Visitor Profile Report

February 2009

Strategic Marketing & Research, Inc.

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BACKGROUND & OBJECTIVES

Wyoming Tourism is charged with increasing the economic impact of tourism in the state. This includes efforts to market the state, as well as providing support to the communities and areas that attract visitors. To accomplish these goals, it is necessary to have a thorough awareness of who visits, including basic information relative to visitor demographics and origin, and extensive details surrounding their visitation. This information helps Wyoming Tourism develop and implement programs that reach past and potential visitors and brings them to the state.

To ensure that there is a clear understanding regarding visitors and trips, Wyoming Tourism conducts annual visitor profiling research. In some years the research focuses only on overnight visitors, but this year the profiling includes both overnight and day-trip visitors. Information is collected throughout the year, and this is the final report on 2008's visitation and visitors.

The specific informational objectives for this research included the following:

- **Gathering information about both overnight and day trips to Wyoming,** including mode of transportation, accommodations used, attractions visited, travel party size, duration of trip, and expenditures;
- **Tracking the levels of visitation** to the state, and how visitation changes over time;
- **Identifying the origin of visitors,** including the states and markets that are key travel generators;
- **Exploring the motivations for visitation** of different groups of visitors and other differences by visitor segment;
- **Comparing differences in the behavior** of overnight visitors versus day visitors, as well as differences between those visiting friends and relatives versus those deemed marketable trips;
- **Measuring past visitation** to Wyoming, including most recent visit and frequency; and
- **Determining the details of the trip planning process** relative to visitation to Wyoming.
- **Forwarding conclusions and recommendations** regarding the current level of visitation and options for increasing it in the future.

METHODOLOGY

The methodology was based on a quarterly survey among visitors to Wyoming, but modified slightly this year to gather more visitor information. Instead of quarterly interviewing, Strategic Marketing and Research, Inc., moved to monthly interviewing. This allows the ability to identify more trips and to gather information about trips more recently after they occurred. An online data collection methodology allowed for the use of aids such as maps, pictures, and prompts to assure complete and accurate consumer feedback. SMARI used SSI, a sample vendor with an e-mail panel of 6 million households, to conduct the research.

Relative to this research, the biggest challenge was finding visitors to Wyoming. Other methodologies used for this effort resulted in small samples of visitors, which limited the ability to segment or consider sub-groups. A stratified random sample of households throughout the United States was used, with focus on Wyoming and its surrounding states. Three marketing areas were surveyed: east, west, and surrounding states as shown in the table to the right (excluding Alaska and Hawaii). The division between the east and west samples is the Mississippi River. Because visitation tends to be regional, this method provided more visitors and allowed for the assessment of the distribution of visitation from across the country.

With the monthly data collection, this research has collected 1,404 overnight trips and 1,667 day trips. The survey collected myriad types of information regarding travelers' trips to Wyoming and some data regarding trips taken to competitive states. A copy of the survey instrument appears in the Appendix.

To help assess the findings, comparisons are made to past research. For the overnight findings the comparisons are to the final numbers from 2007, and for the daytrips the comparisons are to the final numbers from 2006 (last available).

States Included in Surrounding, East & West Samples

Surrounding	East	West
CO	AL	AR
ID	CT	AZ
MT	DC	CA
NE	DE	IA
ND	FL	KS
SD	GA	MN
UT	IL	MO
WY	IN	NM
	KY	NV
	LA	OK
	MD	OR
	MA	TX
	ME	WA
	MI	
	MS	
	NH	
	NJ	
	NY	
	NC	
	OH	
	PA	
	RI	
	SC	
	TN	
	VT	
	VA	
	WV	
	WI	

OVERVIEW

The mid-year visitor profile in 2008 began the discussion about the fact that ***the travel environment in 2008 was not the same as that in 2007.*** At mid-year a key factor was the price of gasoline, and waning consumer confidence. At that point it was noted that national research, as well as the research that SMARI has conducted for other clients, had shown ***consumers changing their travel patterns***. At that point, the finding was that travel was still happening, and the overall level of travel was remaining fairly steady. ***But people were tending to choose destinations closer to home and changing either the number of trips or the expenditures on a trip. During the later part of 2008 conditions worsened, and the actual level of travel decreased.*** National research by TIA projected a decrease of 1.8% in person-trips for 2008.

As will become evident, these changes are reflected in the visitor profile research for Wyoming. Unfortunately, Wyoming was not immune to these outside factors. While the level of visitation did not drop, as projected for the US, it is likely that the level of travel and the number of trips was depressed. As a result, the findings and comparisons to past years must be considered in light of the changing environment. And decisions about future marketing efforts also must take this new reality into account.

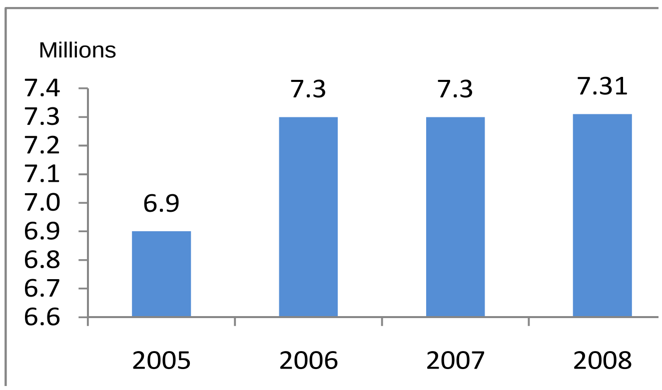
The following report first summarizes the findings regarding overnight visitors, and then turns to a review of day-trip visitors.

OVERNIGHT VISITORS

This research provides detailed information about the overnight trips that people took to Wyoming and compares these findings to the results from last year. As such, the study focused on finding these travelers and gathering information about their travel, providing the ability to profile overnight trips.

The 2006 findings indicated a 6% increase in the number of overnight visitors. In 2007, the percentage of travel remained unchanged, with 7.3 million overnight visitors taking trips to Wyoming. While the overall travel performance nationally indicated a decrease in person trips, for Wyoming there was a slight increase (1.4%) in the number of overnight visitors.

Overnight Visitors to State



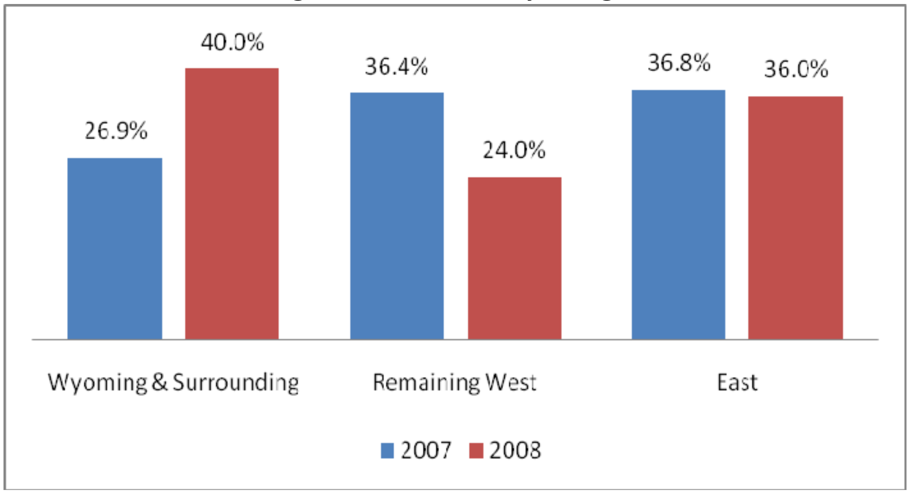
A review of the seasonal patterns of visitation is helpful in understanding what was occurring for Wyoming. The year actually started out a bit slow in terms of visitation, but travel was stronger during the second and third quarters. This suggests that the volume of travel was headed toward an increase during 2008. But the fourth quarter, which is not as strong for Wyoming, saw a major decrease. This is not surprising, as this was a national trend and many destinations saw decreases during this time. But, it is probably the major reason that the state showed only a small increase in travel for the year. While this is encouraging in terms of the 2008 visitation levels, it may portend further weakness in 2009.

Overnight Visitation by Quarter

	2007	*2008*
First Quarter	27.6%	24.5%
Second Quarter	37.6%	41.0%
Third Quarter	29.0%	31.2%
Fourth Quarter	5.6%	2.9%

The next intimation of how the changes are affecting travel to Wyoming relates to the origin of visitors. As the following shows, the percentage of trips from Wyoming and the surrounding states increased, while trips from elsewhere in the West decreased. It is noteworthy that the volume of trips from the East remained the same. These were probably the summer trips that were planned a long time in advance, and therefore maintained even as the economic climate began to deteriorate. Wyoming should expect further change in this pattern during 2009, and probably a decline in trips from east of the Mississippi.

Origin of Visitors to Wyoming



There are 15 states that represent 75% of the overnight trips, and there is even more concentration from the closer states this year. Colorado, as in past years generates the most trips, followed by Utah, Wyoming and California.

Origin of Overnight Visitors

	2006	*2007*	*2008*
CO	13.9%	16.0%	16.2%
UT	5.8%	7.7%	9.9%
WY	12.0%	8.6%	8.8%
CA	8.4%	5.5%	6.8%
ID	4.6%	4.7%	4.9%
MT	4.5%	4.7%	4.8%
TX	3.6%	3.7%	4.5%
WA	1.3%	2.8%	3.8%
SD	4.8%	3.4%	2.9%
FL	2.9%	3.2%	2.4%
NV	1.4%	1.2%	2.4%
NE	1.5%	3.5%	2.1%
OR	2.6%	1.8%	2.1%
AZ	2.2%	1.3%	2.0%
IL	1.9%	2.8%	2.0%
Total	**71.4%**	**70.9%**	**75.6%**

When the information on the DMAs that generated the most travel is considered, again the pattern is reinforced. As seen in 2006 & 2007, Denver generated the most overnight visitation. The size of this market and its proximity make it a natural source for visitors. Salt Lake City is again the second major generator. After that there are another 9 markets that generated at least 2% of the visitation. They tend to be markets closer to the state. The key finding is that outside of the 2 nearby major DMAs (Denver and Salt Lake City), the origin of visitors is quite fragmented.

Top Markets for Visitation – All Overnight Trips

Market	*2008*
Denver, CO	15.9%
Salt Lake City, UT	11.6%
Rapid City, SD	3.5%
Idaho Falls-Pocatello, ID	2.9%
Casper-Riverton, WY	2.4%
Los Angeles, CA	2.4%
Billings, MT	2.4%
Seattle-Tacoma, WA	2.3%
Cheyenne-Scottsbluff, WY-NE	2.3%
Portland, OR	2.2%
Colorado Springs-Pueblo, CO	2.1%
Total	**50.0%**

The findings regarding marketable trips also show a heavy representation from Denver and Salt Lake City, with strong fragmentation otherwise. This suggests that the advertising focus on multiple markets throughout the region is the right strategy.

Top Origin DMAs – Marketable Trips

Market	*2008*
Denver, CO	15.4%
Salt Lake City, UT	13.2%
Los Angeles, CA	3.4%
Idaho Falls-Pocatello, ID	3.2%
Casper-Riverton, WY	3.1%
Seattle-Tacoma, WA	2.8%
Rapid City, SD	2.6%
Cheyenne-Scottsbluff, WY-NE	2.0%
Chicago, IL	1.9%
Portland, OR	1.9%
Billings, MT	1.8%
Dallas-Ft. Worth, TX	1.7%
New York, NY	1.7%
Phoenix (Prescott), AZ	1.5%
Total	**56.2%**

The next issue is to consider what motivated people to visit the state. As indicated in past visitor profiling research, overnight visitation to Wyoming is strongly motivated by friends and relatives (VFR) and is often part of a more extensive trip. In reviewing the details of overnight visitation, the following explores information for all overnight trips and for those that are *marketable* (not VFR). In 2007, 56% of trips were marketable, while this year, VFR has increased slightly. This again seems to relate to the type of trips that consumers are choosing to take and the changes they are making. One way to save money is to have more trips to visit friends and relatives.

Marketable Trips

Trip Type	*2007*	*2008*
VFR (non-marketable)	44.1%	47.0%
Marketable	55.9%	53.0%

There was also an increase in the number of repeat visitors for 2008. With the fact that people are choosing trips that are closer to home, they are also more likely to choose places that they have been before. For Wyoming the majority of visitors are repeat visitors, although this is less true among marketable trips.

Repeat Visitors

Trip Type	*2007*	*2008*
All overnight trips	61%	66.5%
Marketable trips	54%	59%

The pattern is also evident in terms of why people chose Wyoming, with the largest group (among the marketable trips) choosing Wyoming because they have been there before. Another key reason was visiting a specific activity or event. This highlights the power of specifics in giving people a concrete reason to choose one destination over another. Especially with consumer concerns about travel, it makes sense to focus on giving them reasons to choose Wyoming. The percentage that wants to try somewhere new and different is fairly small, and therefore the goal is to convince them to take the risk for a specific activity or event.

Reasons for Choosing Wyoming

Reason	*Overnight Trips*	*Marketable Trips*
Been there before and enjoyed it	29.0%	40.1%
Wanted to try somewhere new and different	8.9%	13.1%
Heard about it from friends or family	5.1%	7.0%
Offered a specific activity or event	17.0%	28.6%
Offered something I couldn't get elsewhere	6.8%	11.2%
Went to visit friends or family	33.2%	0.0%

While past research has shown that Wyoming is often not the main destination of visitors' trips, this was less true in 2008. As people traveled closer to home, especially for the marketable trips, they were less likely to visit multiple places. In many ways this seems like a positive finding – as the state before had to share time with other states. But, interestingly the data show that the average number of nights spent in Wyoming was greater for people who visited other states. For those who only visited Wyoming, the average trip length was 3.1 nights, while it was 3.5 nights for those who were going to multiple states. Of course, their total trip was 12 nights in length, so Wyoming did get only a part of the total. But this suggests that attracting part of the longer road trips is just as advantageous for Wyoming.

Main Destination or Shared with Other State

	All Overnight Trips		*Marketable Trips*	
Purpose of Trip	**2007**	**2008**	**2007**	**2008**
Main destination	52.5%	61.4%	44.3%	53.9%
Headed somewhere else but included WY	20.3%	18.1%	19.6%	19.6%
WY was one of several places I decided to visit	27.2%	20.5%	36.1%	26.5%

There are a number of other states that are popular for those visiting multiple states. Many seem to be the traditional road trip that Wyoming is promoting, with visitors reporting an average of 3.8 other states visited in addition to Wyoming. Again, with the economic conditions, these types of "road trips" may wane, but to the degree they continue, the goal for Wyoming is to attract the largest share of the trip possible.

State	*% Visited*
Montana	47%
Colorado	40%
Utah	36%
Idaho	36%
South Dakota	27%
Nebraska	23%
Nevada	21%
Oregon	17%
California	17%
Washington	17%
New Mexico	15%
Illinois	15%
Iowa	15%
Kansas	14%
Arizona	13%
Missouri	13%
Oklahoma	10%

As might be expected, most of the trips involve driving, with only 14% indicating that they flew to the state. The distribution of transportation types is similar for both all overnight trips as well as marketable trips.

Reason	Overnight Trips	Marketable Trips
Drove via car, van, truck or SUV	79%	78%
Flew/airplane	14%	12%
Drove via RV	7%	8%
Motorcycle	4%	5%
Bus or motorcoach trip	3%	4%

Another positive finding regarding 2008 is that this year the trips (nights spent in Wyoming) are longer, and the travel parties are bigger. More people also are traveling with children. Nationally, the average overnight trip lasts 3.2 nights, and 22% of travel parties include children. From this perspective, Wyoming trip specifics are average relative to nights stayed, and somewhat above average relative to children in travel parties. From an economic impact perspective, having people in the state for a longer period of time is positive. It's not clear to what degree these changes are a response to the economic conditions, so the trend in terms of length of trip and travel party size should be monitored, but obviously Wyoming should support this trend in its marketing and advertising.

Longer Trips and Larger Parties with Children

	All Overnight Trips		*Marketable Trips*	
Trip Specifics	**2007**	**2008**	**2007**	**2008**
Average duration of trips	2.8	3.2	2.6	3.2
People in travel party	2.8	3.4	3.1	3.5
% with children on trip	23.1%	34.8%	20.6%	32.8%
Children under 18 in travel party	0.5	0.8	0.5	0.8

The popularity of the various regions of the state remained fairly steady, with the most visitation to the Northwest and Southeast areas. There was less visitation to multiple regions on trips, so that visitation was slightly lower for most of the regions – but only by small percentages. This is interesting in light of the longer trip length.

Regions Visited

	Overnight Trips		*Marketable Trips*	
Visited	**2007**	**2008**	**2007**	**2008**
Central	25.7%	23.0%	25.3%	21.1%
Northeast	22.7%	22.4%	21.0%	20.7%
Northwest	45.4%	42.9%	56.3%	51.3%
Southeast	34.9%	33.0%	32.2%	30.4%
Southwest	22.4%	22.5%	23.0%	23.7%

As in past research the favorite attraction among visitors taking marketable trips was Yellowstone National Park, followed by Jackson Hole, Grand Teton National Park, and Cheyenne. These findings support the regional visitation patterns. Visitors generally go to several destinations within the state; in 2008 the average is 3.8 sites. The following table shows all of the places that garnered at least 5% visitation.

Most Popular Destinations - Marketable Trips

Destination	***Visited***
Yellowstone National Park	35.6%
Jackson Hole	29.7%
Grand Teton National Park	29.4%
Cheyenne	17.3%
Snake River	15.2%
Cody	12.4%
Laramie	11.7%
Casper	11.6%
Devils Tower National Monument	10.7%
Big Horn Scenic Byway	8.5%
Buffalo Bill Historical Center	8.4%
Big Horn Mountains	7.7%
Snake River Canyon	7.0%
Buffalo	6.6%
Rock Springs/Green River	6.5%
Sheridan	6.4%
Evanston	6.0%
Hot Springs State Park	5.9%
Bridger-Teton National Forest	5.3%
Flaming Gorge National Recreation Area	5.2%
Gillette	5.1%
Rawlins	5.1%
Thermopolis	5.1%

The research explores what people did on their trips, as well as the activities that motivated travel to Wyoming. The activities and motivations are similar for both overnight and marketable trips. The key activity and motivator is visiting a state or national park, followed by scenic drives, wildlife watching, camping, and visiting historical sites. (table on next page)

Net Impact of Specific Activities

	Overnight Participate	Overnight Motivate	Marketable Participate	Marketable Motivate
Visiting a state or national park	28.0%	11.5%	50.4%	33.1%
Scenic drive	37.2%	10.2%	50.8%	20.6%
Wildlife watching	19.4%	3.8%	31.6%	10.4%
Camping	15.3%	6.1%	20.6%	10.2%
Visiting historical sites	22.4%	4.2%	32.5%	9.0%
Fishing	15.2%	5.1%	16.5%	8.3%
Hiking or backpacking	18.1%	3.9%	27.6%	6.7%
Sightseeing tour	13.2%	3.0%	19.2%	6.4%
Shopping	37.9%	5.5%	33.9%	6.2%
Visiting museums	15.0%	2.0%	28.5%	5.8%
Other	7.7%	4.9%	6.5%	4.8%
Visiting hot springs	10.3%	2.4%	14.5%	4.6%
Visiting Native American sites	10.4%	2.4%	17.7%	4.3%
Attending a festival or fair	12.1%	3.2%	11.4%	3.9%
Boating	4.4%	1.3%	7.2%	3.2%
Horseback riding	10.6%	2.7%	8.8%	2.8%
Snow skiing or snowboarding	3.8%	2.1%	2.9%	2.5%
River rafting	4.7%	1.7%	7.2%	2.5%
Bird watching	7.5%	1.2%	11.1%	2.0%
Visit archaeological site(s)	4.5%	0.9%	7.3%	2.0%
Mountain climbing	5.1%	1.9%	4.6%	1.9%
Attending a rodeo	8.0%	2.3%	6.4%	1.8%
Bicycling or mountain biking	5.0%	1.2%	5.9%	1.7%
Hunting	2.7%	1.5%	2.6%	1.6%
Rock climbing	2.8%	0.7%	4.1%	1.5%
Snowmobiling	3.0%	1.2%	2.8%	1.5%
Visiting a dude ranch	2.8%	0.5%	3.0%	1.0%
Attending performing arts	4.9%	1.8%	5.1%	1.0%
Canoeing or kayaking	2.7%	0.8%	3.1%	0.9%
Gambling	7.1%	2.2%	5.9%	0.7%
Attending a Pow Wow	2.2%	1.0%	2.1%	0.4%
Golfing	3.6%	0.7%	2.0%	0.3%

Another way to consider the motivations is to look at segments of visitors and the "theme" or combination of activities that motivated their travel. Past research developed a group of 9 trip segments for Wyoming. Again in 2008 almost half of the trips were motivated by visitation to National Parks. Culture trips were second, followed by Miscellaneous and Scenic.

Segment Distribution – Marketable Trips

Segment	***%***
National Park	48.8
Culture	11.7
Misc	10.9
Scenic	10.0
Snow	4.7
Camping	4.0
Hunting/Fishing	4.5
Native American	2.9
Event	2.6

A review of the segments highlights the prevalence of interest in the national parks – even among those who were more motivated by other activities. This information suggests that it is critical to promote the parks, but that there are other opportunities also. The prevalence of trips that are linked to museums and historic sites (in addition to parks) is encouraging.

- **National Park:** this segment focused on state and national parks and participation in outdoor activities, e.g., watching wildlife, hiking and backpacking.
- **Culture:** these trips included visiting museums and historic sites. Nonetheless, most of these travelers also visited a state or national park.
- **Scenic:** these trips were motivated by scenic drives. Other activities included visiting parks, watching wildlife and historical sites.
- **Snow:** as in skiing or snowboarding.
- **Native American:** these visitors were the most likely to be motivated by Native American sites and sightseeing tours.
- **Hunting/Fishing:** while motivated by hunting and fishing, these travelers also enjoyed scenic drives, visiting parks, camping, hiking or backpacking.
- **Camping:** this segment was motivated by camping and also enjoyed scenic drives, visiting parks, hiking and shopping. Also, the most likely to stay in campgrounds.
- **Event:** these were generated by a specific event and were most likely to have Wyoming as the primary destination;
- **Miscellaneous:** generally these travelers were not motivated by activities.

One of the challenges with the segments and understanding them in more detail is that some of them are quite small. Now that there is three years of data on the segments, SMARI is compiling a more detailed analysis of the segments to provide more insight into the characteristics and behavior of each group. This information can be used to identify the best targets and then focus messages and strategies toward the key groups.

The economic climate is also evident in terms of the accommodations that people used. The percentage that reports camping and staying with family and friends (among the marketable trips) is up. This is a good way to still be able to travel, but spend less on the trip. At the same time, the majority of visitors use paid accommodations.

Accommodations used

	Overnight Trips		*Marketable Trips*	
	2007	**2008**	**2007**	**2008**
Hotel/motel	62.9%	56.0%	68.1%	66.0%
Inn, lodge, or B&B	16.0%	15.2%	19.1%	19.8%
Resort or dude ranch	4.6%	3.6%	5.7%	4.9%
RV park	7.3%	6.9%	11.0%	8.8%
Campground	12.1%	15.5%	15.0%	19.8%
Rental home/condo/timeshare	3.3%	3.5%	4.5%	5.1%
With friends or family	22.4%	33.1%	6.4%	11.1%
Other	3.0%	4.1%	4.5%	5.1%

Of course, one of the most important factors to Wyoming Tourism is the economic impact of tourism in the state. This relates to both the number of visitors and how much they spend. The positive news is that because trips were longer and there were more people on the trip, the overall per trip expenditures increased this year. At the same time, the per person/per day expenditures were down. This highlights how consumers changed their behavior this year.

Expenditures on Trips

	Overnight Trips		*Marketable Trips*	
	2007	**2008**	**2007**	**2008**
Lodging	$216	$276	$260	$362
Meals/food/groceries	$146	$197	$154	$194
Entertainment	$84	$123	$101	$85
Activities	$63	$87	$86	$64
Shopping	$207	$197	$254	$167
Transportation	$189	$272	$202	$253
Other	$77	$72	$97	$81
Total	**$981**	**$1,227**	**$1,154**	**$1,207**
Per-person/per-day	$125	$113	$143	$108

In spite of any changes that people are making in their trip selection or choices, they are still quite positive about their experience in Wyoming. The ratings of the experience are similar between those who took marketable trips and all overnight visitors.

Trip Rating

	Overnight Trips		*Marketable Trips*	
Rating	**2007**	**2008**	**2007**	**2008**
Excellent	52.6%	52.7%	54.4%	55.6%
Very good	32.5%	31.7%	29.6%	30.0%
Good	11.5%	12.7%	12.6%	11.1%
Fair	1.7%	2.0%	1.7%	2.4%
Poor	1.7%	0.9%	1.7%	0.9%

All visitors were asked to rate their likelihood to revisit the state within the next year. With more people coming from nearby areas, the percentage predicting a repeat trip in the coming year is actually higher. This is positive for Wyoming, although many predicting a trip were surveyed earlier in 2008, and may have now changed their plans.

Likelihood to Visit

	Overnight Trips		*Marketable Trips*	
	2007	**2008**	**2007**	**2008**
Very likely	41.1%	48.4%	30.7%	41.0%
Somewhat likely	35.5%	29.2%	41.3%	31.3%
Not likely	23.4%	22.4%	28.0%	27.7%

In 2008, the average overnight and marketable visitor was married, with some college or technical school education. They reported having 2.9 people living at home, with 0.8 children. There were some differences compared to last year, as the average age was younger this year, and the average household income was also lower.

Demographic Profile

	Overnight Trips		*Marketable Trips*	
	2007	**2008**	**2007**	**2008**
Marital Status				
Married	65.3%	62.7%	69.6%	66.6%
Divorced/separated	13.4%	15.1%	11.2%	14.5%
Single/never married	15.7%	18.5%	15.7%	16.4%
Widowed	5.7%	3.7%	3.5%	2.5%
Education				
High school or less	13.9%	16.6%	12.8%	15.0%
Some college or tech school	43.7%	42.1%	42.1%	40.5%
College graduate	28.8%	29.4%	32.0%	30.6%
Post-graduate degree	13.6%	11.9%	13.1%	13.8%
People in household	2.6	2.9	2.6	2.9
Children	0.6	0.8	0.6	0.8
Age	50	45	50	45
Income	$66,982	$65,933	$72,039	$70,817
Gender				
Male	28.1%	23.3%	33.6%	
Female	71.9%	77.7%	66.4%	

TRAVEL PLANNING TRENDS

Understanding how travelers plan their trips is an important step in effective marketing. First, the travel planning timeframe has implications for marketing campaign flights. Interestingly this information hasn't changed much over time, even though other travel behavior has. About one-third of all trips taken were more spontaneous and were planned in less than one month. Marketable trips were less spontaneous, however, with more trips taking three or more months to plan.

Trip Planning Process

	All Overnight Trips		*Marketable Trips*	
Planning Time	**2007**	**2008**	**2007**	**2008**
Less than 1 month	37.0%	39.7%	33.9%	35.6%
At least 1 month, but less than 2 months	19.3%	20.8%	17.5%	21.5%
At least 2 months, but less than 3 months	18.2%	13.3%	18.7%	13.1%
At least 3 months, but less than 6 months	10.3%	13.8%	12.4%	15.0%
6 months or more	15.1%	12.4%	17.6%	14.8%

Before traveling and when planning their trips, most consumers gather travel information from various sources. All the visitors were given a list of informational sources and were asked to indicate which ones they used to plan travel. As seen below, the Internet was by far the most popular source, followed by talking with family and friends. Marketable trip travelers were more likely than overnight visitors in general to report using the Internet, and less likely to talk to friends and family about their trips. Use of the Internet continues to grow, especially when people are researching trips that are not VFR. This supports other research SMARI has conducted, and reinforces the need to ensure that consumers can find information about Wyoming on the web, especially the official site.

Sources of Information

	All Overnight Trips		*Marketable Trips*	
Information Sources	**2007**	**2008**	**2007**	**2008**
Used Internet	49.3%	49.2%	55.6%	57.8%
Talked to friends and family	30.8%	37.4%	20.8%	26.9%
Contacted chamber of commerce for info	9.4%	5.2%	11.6%	6.8%
Called 800 number	8.2%	4.6%	9.5%	5.7%
Contacted individual attraction/event	6.5%	10.0%	9.8%	13.7%
Other	12.0%	7.4%	11.8%	8.8%
None	24.6%	21.5%	16.4%	20.1%

To ascertain which Internet sites attracted the most people, the respondents were asked to indicate which sites and resources they had used over the last year. Visitors were very likely to use the Wyoming site – it was the leading source cited. Lodging is obviously important and therefore lodging-related websites are also quite popular. SMARI also explored the usage of Yellowstone.com, which was cited by 3% of the consumers. SMARI has found that it is often difficult for consumers to remember the specific sites they used.

Consumers are interested in reviews also, although not necessarily through Trip Advisor. Blogs are one of the least-used sources.

Used (Among those Using the Internet)

Site used	***Percent***
Wyomingtourism.org	68.9%
Lodging or camping website	59.5%
Hotel/attraction reviews	44.9%
Destination reviews	37.4%
Hotels.com	34.2%
Expedia	28.2%
Travelocity	26.0%
Trip Advisor	24.1%
Orbitz	20.2%
Priceline	19.8%
Airline website	18.5%
Message boards	17.4%
Blogs	13.8%
Kayak.com	12.5%
Yellowstone.com	3.0%

Not only is the Wyoming site the most used, it is viewed as the most useful. The other most-useful sites tend to be lodging-related, although the major travel agent sites – Expedia and Travelocity – are also noted. Priceline was noted as more helpful this year, again supporting an interest in saving money.

Review of Travel Websites

	Very Helpful
Wyomingtourism.org	61.3%
Lodging or camping website	60.1%
Hotel/attraction reviews	53.2%
Airline websites	50.5%
Destination reviews	48.2%
Hotels.com	49.7%
Expedia	46.9%
Trip Advisor	48.9%
Priceline.com	42.7%

DAY TRIPS

While a major focus of the marketing efforts is attracting overnight visitors, it is also important to understand those who travel within or to the state for a daytrip. While these visitors spend less money, they are a key part of the overall tourism impact.

Wyoming conducts research on day-trip visitors only every other year, so the comparisons in this report compare 2008 to 2006. In many ways the day-trip visitors seem very similar between the two years. Of course, some of the changes in travel trends would not be as apparent with day-trip visitors since they already come from much closer. To start, the proportion of VFR and marketable trips remained almost exactly the same. Marketable trips are more prevalent, although almost half the trips are VFR.

Type of Trip

	2006	*2008*
Visiting friends & relatives	47.0%	47.3%
Marketable	53.0%	52.7%

One change in day trips was that they were more focused, with Wyoming being the main destination for 63% of the trips. In a related way there were fewer trips that included several different places. In past years it seemed that Wyoming was simply a day trip along the way of a longer trip - and as noted with the overnight trips, this pattern of travel is less prevalent this year.

Best describes visit to Wyoming	*2006*	*2008*
Main destination	44.3%	63.3%
Headed somewhere else but included WY	25.2%	23.4%
WY was one of several places I decided to visit on trip	30.5%	13.4%

As a result, there were more repeat day trip visitors. In fact, more than two-thirds of Wyoming visitors had visited the state in the past five years. However, the average number of trips was lower, perhaps due to economic concerns and cutbacks in travel.

	% Repeat Visitors	*Average # of Trips*
2006	52.7%	2.9
2008	69.5%	2.1

Not only was there a high level of repeat visitation, but the majority of visitors indicate that they are likely to return again in the next year. In fact, visitors this year are even more likely to foresee a visit than those in 2006. This may be a result of their experience, but also may represent their perceptions about the travel environment and future travel choices.

Day Trippers' Likelihood to Visit	***2006***	***2008***
Very likely	43.0%	**53.5%**
Somewhat likely	33.2%	25.2%
Not likely	23.8%	21.3%

Of course, given this situation it's not surprising that the most-cited reason for choosing to visit Wyoming is "having been there before and enjoyed it." More people were motivated by visiting friends and relatives this year, although more were also coming to a specific event or activity. This is a positive finding – and will probably lead to more repeat visitation.

Reasons for Visiting Wyoming	***2006***	***2008***
Been there before and enjoyed it	44.2%	30.1%
Heard about it from friends or family	18.6%	5.3%
Wanted to try somewhere new and different	14.3%	11.1%
Went to visit friends or family	11.6%	30.0%
Offered a specific activity or event	9.3%	16.5%
Offers something I can't get anywhere else	2.1%	7.0%

Possibly related to the higher percentage of more focused day trips (not part of a longer trip), the average travel party size was slightly smaller and more people traveled with children than in 2006.

Travel Party	***2006***	***2008***
People in travel party	3.3	3.0
% with children on trip	23.3%	37.7%
Children under 18 in travel party	0.7	0.8

ACTIVITIES BY DAY TRIPPERS

Trip expenditures overall stayed almost the same, although there were some notable changes in how the money was spent. Visitors spent less on transportation and activities, but more on shopping, food, and entertainment. The trends for daytrip visitors were different from those for overnight visitors and smaller travel parties resulted in an increase in the per-person/per-day expenditures, but overall there seems to be little change. As noted the change her may have been fewer daytrips, rather than changes in expenditures for these trips.

Expenditures: Day Trips	***2006***	***2008***
Meals/food/groceries	$62	$73
Entertainment	$15	$36
Activities	$41	$20
Shopping	$49	$107
Transportation	$180	$96
Other	$3	$21
Total	**$350**	**$352**
Per-person/per-day	$108	$117

Satisfaction with the day trips in 2008 is stronger than in 2006. More visitors rated their Wyoming trip experience as excellent – which isn't surprising given the number of repeat visitors. They know what they will experience in Wyoming and they choose this option. The good news is that even if they are making the choice in part due to economic concerns, the trip still meets their expectations.

Satisfaction	***2006***	***2008***
Excellent	32.0%	41.4%
Very good	37.6%	34.8%
Good	22.0%	18.5%
Fair	8.0%	3.7%
Poor	0%	1.5%

TRIP PLANNING

Having reviewed the trip details, it is also useful to assess the trip planning process. This can help Wyoming Tourism plan their marketing efforts to influence day trips. As should be expected, the planning timeframe for day trips is quite short, and the majority of trips are planned in less than a month. As more people took Wyoming-only day trips this year, we also see that more people planned their trips in less than a month this year – although more also planned a trip at least six months in advance. These are likely to be the people who are visiting elsewhere and only stopping in Wyoming for part of their trip.

Time Taken to Plan a Trip

	2006	*2008*
Less than 1 month	56.3%	64.7%
At least 1 month, but less than 2 months	13.8%	13.8%
At least 2 months, but less than 3 months	21.3%	6.7%
At least 3 months, but less than 6 months	8.1%	5.6%
6 months or more	0.6%	9.2%

One of the notable changes this year is the increased use of travel websites and decreased use of Wyoming's official tourism website. People are likely seeking out deals on entertainment and attractions and thus turn to the tourism sites. More people also talked to friends and family, which makes sense given the increased visitation of friends and family.

Informational Resources Used

	2006	*2008*
Visited Wyoming's official state tourism website (wyomingtourism.org)	26.7%	17.2%
Visited other travel websites	13.3%	39.4%
Visited lodging or camping website	5.6%	12.2%
Called 800 number to request information	2.5%	1.3%
Contacted individual attraction or event to request information	1.2%	6.0%
Other	0.7%	6.4%
Talked to friends and family	0.2%	23.7%
Contacted individual chamber of commerce to request information	0.0%	1.4%
None	49.9%	30.3%

The profile of the day-trip visitor did change a bit since 2006. First of all, there were more single day-trip visitors this year and fewer married couples. Day-trip visitors were also a bit more educated this year, as well as younger and more affluent.

Demographic Profile

	2006	*2008*
Marital Status		
Married	71.1%	56.5%
Divorced/separated	10.5%	16.7%
Widow	0%	4.9%
Single/never married	18.4%	21.9%
Education		
High school or less	19.1%	23.2%
Some college or tech school	53.0%	43.9%
College graduate	18.9%	25.6%
Post-graduate degree	9.0%	8.3%
People in household	2.1	2.9
Children in household	0.2	0.9
Age	49.3	41.2
Average household income	$45,438	$54,300
Gender		
Male	17.8%	21.3%
Female	82.2%	78.7%

CONCLUSIONS & RECOMMENDATIONS

There is no doubt that 2008 was a challenging year for travel and states across the country including Wyoming. During the first three quarters of the year travel was fairly strong, but the last quarter was quite weak. As a result, the state saw only a 1.4% increase in visitors. Given the weakness in travel during the 4^{th} quarter, this may bode continued weakness for 2009, especially in light of the current economic conditions. Wyoming Tourism should monitor this trend and be prepared for more negative conditions.

One positive factor for 2009 is that one of the dampers for travel during 2008 was high gasoline prices, which are not as strong a factor this year. The result last year was more people from nearby and fewer from other western areas. Travel from east of the Mississippi actually remained fairly steady, although probably due to plans that were made prior to more negative conditions. Wyoming should anticipate less travel from the further eastern markets this year. The focus on generating travel should be nearby markets.

In targeting, it is clear that a significant amount of visitation comes from the two nearby major DMAs – Denver and Salt Lake City. Outside these two the origin of visitors is quite fragmented. As a result, the marketing should focus on both these 2 key markets, as well as other smaller nearby markets.

Wyoming attracts a high proportion of repeat visitors, and this trend should be reinforced in 2009. It will be more difficult to get people to try something new, but as they consider travel options there is lots of opportunity to convince them to return to favored destinations. When conditions are uncertain, people often seek more comfortable and safe choices. This was also evident in their use of information. More people turned to advice from friends and relatives. Word of mouth can be important, and efforts to convince Wyoming citizens to promote and invite friends and relatives could be a good strategy for 2009.

Additionally, the push to attract the great American road trip could also still be viable – although it makes sense to continue to focus it in nearby states. While those who take a road trip visit other states and split their trip, they actually spend more time in Wyoming than those who make the state their primary destination. Of course, there is also opportunity to increase the length of stay in Wyoming and garner more benefit from these road trips.

In motivating visitation the National parks are a key element. Even when this is not the main motivator of travel, visiting the parks is a critical part of the experience. At the same time, promoting specific reasons to visit the state may help motivate people and overcome hesitation. This strategy can work especially well with repeat visitors who already are favorable and interested in visiting. By giving them a more tangible reason and a timeframe, this can maximize success and in some cases result in multiple trips.

Another interesting finding this year was the increase in the number of trips that included children. The advertising campaign may have helped achieve this result, or economic conditions may have caused people to “combine” trips and take one family vacation instead of multiple trips. Regardless of the reason for the result, it is positive, as larger travel parties spend more. Wyoming Tourism should continue to support this trend.

In terms of travel planning, the Internet continues to be a key source. At the same time, growth in usage has slowed or stopped. This past year there was less usage of 800 numbers and fewer people who called the local chamber of commerce. People were a bit more likely to turn to recommendations from friends and family.

When considering the best internet sources people tend to turn to reviews. They mentioned using hotel and attraction review sites – although not as strongly Trip Advisor. They also are not very likely to use blogs. It is positive that most used Wyoming’s website, and it was rated as the most useful.

The major trend with daytrips was that more people were visiting friends and relatives for these trips. As with overnight trips the travel party was more likely to include children. A challenge with daytrips was that there were fewer reported, and again using events may be a way to increase this number in 2009. It is also noteworthy that the planning timeframe for daytrips shortened in 2008, with most being planned within a month. So, if a strategy to influence this is implemented, these timing considerations should be kept in mind.

APPENDIX

Wyoming Visitor Profile

April 21, 2008

Thank you for participating in our research study. Your opinions are valuable to us! This survey is for research purposes only. No sales effort will ever result from your participation. This survey should take approximately ten minutes of your time.

S1 First, what is your ZIP code? _______________

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

1. Me
2. Myself and my spouse/partner
3. My spouse/partner – THANK & TERMINATE

Think for a moment about any leisure travel that you've taken within the U.S. in 2008. This would be any trips that:

- occurred since the beginning of January;
- were NOT for business;
- involved an overnight stay away from home, or
- were daytrips at least 50 miles from home.

Q1. Have you visited any of the following states since January 2008 for a leisure trip? If so, how many leisure trips have you taken to each state in 2008?

	States Visited since Jan. 2008	Number of Trips since Jan. 2008
Colorado		
Idaho		
Kansas		
Montana		
Nevada		
New Mexico		
Oklahoma		
Oregon		
South Dakota		
Texas		
Utah		
Washington		
Wyoming		
None of these		

IF ALL AT Q1 = 0 TRIPS, ASK Q3 and THEN THANK AND TERMINATE.
IF S3 WYOMING > 0 TRIPS, ASK Q2. IF RESPONDENT IS NOT A WYOMING VISITOR, BUT HAS VISITED ANOTHER STATE, ASK Q2 & Q3 AND THEN THANK AND TERMINATE.

Q2. (SHOW STATES VISITED SINCE JANUARY 2008) Below you will see the states you indicated you have visited and the number of trips taken since January 2008. Please indicate the number of trips to each state that were daytrips and the number of trips to each state that were overnight trips.
[LIST ALL TRIPS FROM Q1 WITH NUMBER OF TRIPS THEY INDICATED IN GRID AND ADD NEW COLUMNS FOR DAYTRIPS AND OVERNIGHT TRIPS]

	Number of Trips since Jan. 2008	Number of trips that were **daytrips**	Number of trips that were **overnight trips**
Colorado			
Idaho			
Kansas			
Montana			
Nevada			
New Mexico			
Oklahoma			
Oregon			
South Dakota			
Texas			
Utah			
Washington			
Wyoming			

Q3. How likely are you to visit each of the following states as part of a leisure trip in the next year?

	Not likely	Somewhat Likely	Very likely
Colorado			
Idaho			
Kansas			
Montana			
Nevada			
New Mexico			
Oklahoma			
Oregon			
South Dakota			
Texas			
Utah			
Washington			
Wyoming			

Below you will see one of the states you indicated you have visited and the number of trips taken since January 2008. Please indicate the month of trip, length of stay, and if the main purpose was to visit friend and family.

Q4. Please tell us a little more about your 2008 Wyoming trip(s). If you are listing multiple trips, the most we will ask you about is 6. Please list your day trips first then your night trips. Thinking about …

	Month of trip (DROP DOWN WITH MONTHS – JAN THRU MAY)	How many nights did you stay (enter 0 if daytrip) (let respondent enter number)
Wyoming trip(s) [INSERT TRIP #}		

Q5. Now we'd like to know about other states you visited in 2008. Please tell us a little more about your most recent **overnight** trip to...

	Month of trip (DROP DOWN WITH MONTHS – JAN THRU MAY)	How many nights did you stay (enter 0 if daytrip) (let respondent enter number)
(INSERT STATE) trip		

Q6. Besides this year, had you visited Wyoming for a leisure trip in the previous five years?

1. Yes
2. No – SKIP TO Q7

Q6a. In the past 5 years, how many leisure trips have you taken to Wyoming? _________

[RANDOMLY SELECT WYOMING TRIP SELECTING ONE THAT WHO'S PRIMARY MOTIVIATION WAS **NOT** TO VISIT FRIENDS AND FAMILY FIRST – IF NONE, THEN RANDOMLY SELECT ANY. PLEASE PULL IN MONTH AND LENGTH OF TRIP TO INDICATE WHAT TRIP – EG. 5 NIGHT TRIP IN JANUARY. ASK Q7- Q21 TWICE IF POSSIBLE, FOR ONE DAY TRIP AND ONE OVERNIGHT TRIP.]

Q7. What method of transportation did you use to travel to Wyoming on your (INSERT LENGTH AND MONTH FROM WYOMING Q5) trip?

1. Drove via car, van, truck or SUV
2. Drove via RV
3. Flew/airplane Specify airport _______________
4. Bus or motorcoach trip
5. Motorcycle
6. Other (Please specify__________)

Q8. Which of the following best describes your visit to Wyoming on your (INSERT LENGTH AND MONTH FROM WYOMING Q5)?

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

Q8A. What other states did you visit on this trip?
[INCLUDE STATE LIST WITH CHECK BOXES INCLUDE NO OTHER STATES VISITED AT END OF LIST]

IF Q8=2 OR 3 ASK Q8B & Q8C. OTHERS SKIP TO Q9. IF DAYTRIP AND Q8=2 OR 3, ASK Q8B BUT SKIP Q8C.

Q8B. HOW MANY NIGHTS DID YOU SPEND ON YOUR ENTIRE TRIP? _____

Q8C. HOW MANY NIGHTS DID YOU SPEND IN WYOMING DURING YOUR TRIP? ___

Q9. Which of the following best describes the reason you chose to visit Wyoming on this trip?

1. I had been there before and enjoyed it
2. I wanted to try somewhere new and different
3. I had heard about it from friends or family
4. It offered a specific activity or event
5. It offered something that I couldn't get anywhere else
6. I went to visit friends or family

Q10. Prior to your (INSERT LENGTH AND MONTH FROM Q5) visit to Wyoming, which of the following sources did you use to gather information for planning your trip?

1. Called 800 number to request info
2. Talked to friends and family
3. Used Internet
4. Contacted individual attraction or event to request information
5. Contacted individual chamber of commerce to request information
6. Other (Please specify__________)
7. None

[IF Q10 = 3 ASK Q10A.]
Q10A. Thinking of your Interet usage, please evaluate the following web resources and their usefulness in planning your trip to Wyoming. *ROTATE*

	Not very helpful	Somewhat helpful	Very helpful	Did not use
Airline websites				
Lodging or camping websites				
Expedia.com				
Travelocity.com				
Orbitz.com				
Priceline.com				
TripAdvisor.com				
Kayak.com				
Hotels.com				
Message boards				
Blogs				
Destination reviews				
Hotel/Attraction reviews				
Wyoming's official state tourism website (wyomingtourism.org)				

Q10b. Were there any other websites that you can recall using for planning your trips to Wyoming? _____________

Q11. How far in advance did you begin planning that [INSERT LENGTH AND MONTH FROM Q5] trip to Wyoming?

1. Less than 1 month
2. At least 1 month, but less than 2 months
3. At least 2 months, but less than 3 months
4. At least 3 months, but less than 6 months
5. 6 months or more

Q12. Including yourself, how many people were in your travel party? ________

Q13. Of those, how many were children under age 18? ________

Q14. With whom did you travel…

☐ Spouse / significant other
☐ Child(ren)/Grandchild(ren): age 0–12
☐ Child(ren)/Grandchild(ren): age 13+
☐ Other Family
☐ Friends/Acquaintances
☐ I traveled alone

Q15. What forms of lodging did you use during your trip? (Mark all that apply.)

1. Hotel or motel
2. Inn, lodge, or bed & breakfast
3. Resort or dude ranch
4. RV park
5. Campground
6. Rental home, condominium or timeshare
7. With friends or family
8. Other (Please specify___________)

Q16. Which of the following activities did you participate in during your trip to Wyoming [INSERT LENGTH ANDMONTH FROM Q5)? (Mark all that apply.)

Hiking or backpacking		Visiting Native American sites	
Visiting a state or national park		Attending a Pow Wow	
Bicycling or mountain biking		Attending a festival or fair	
Mountain climbing		Attending performing arts (music/theater)	
Rock climbing		Visiting historical sites	
Horseback riding		Attending a rodeo	
Hunting		Visit archeological site	
Camping		Wildlife watching	
Snow skiing or snowboarding		Bird watching	
Snowmobiling		Scenic drive	
Canoeing or kayaking		Sightseeing tour	
River rafting		Golfing	
Boating		Visiting a dude ranch	
Fishing		Visiting hot springs	
Visiting museums		Shopping	
		Gambling	
		Other ____________	
		None of the above	

Q17. Of the following in which you said you participated, which motivated you to trave to Wyoming on your [INSERT LENGTH AND MONTH FROM]?

FOR Q18, USE WYOMING REGIONS MAP.

Q18. Which of the following regions did you visit during your trip?

1. Central
2. Northeast
3. Northwest
4. Southeast
5. Southwest

FOR EACH REGION MARKED AT Q18, ASK Q19

Q19. Which of the following places or attractions did you visit in the (REGION FROM Q18)?

Central Region	**Northwest Region (Cont.)**
Wyoming Pioneer Museum	Wapiti Valley
Casper	Lander
Fort Laramie National Historic Site	Wyoming Dinosaur Center
Register Cliff	National Museum of Wildlife Art
Independence Rock	Sinks Canyon State Park
Torrington	South Pass City State Historic Site
National Historic Trails Interpretive Cntr	Thermopolis
Douglas	Other (Specify)
Fort Caspar Historic Site	
Guernsey Trail Ruts	**Southeast Region**
Other (Specify)	University of Wyoming
	Cheyenne
Northeast Region	Laramie
Newcastle	Cheyenne Frontier Days
Devils Tower National Monument	Old West Museum
Sheridan	Rawlins
Gillette	Snowy Range Mountains
Fort Phil Kearney Historic Site	Saratoga
Medicine Wheel Passage Scenic Byway	WY State Capitol
Big Horn Scenic Byway	Wyoming Territorial Prison
Buffalo	Encampment, Medicine Bow National Forest
Other (Specify)	Other (Specify)
Northwest Region	**Southwest Region**
Yellowstone National Park	Museum of the Mountain Man
Grand Teton National Park	Evanston
Jackson Hole	Green River Lakes
Cody	Rock Springs/Green River
Big Horn Mountains	Flaming Gorge National Rec Area
Buffalo Bill Historical Center	Pinedale
Snake River	Kemmerer
Big Horn Canyon National Rec Area	Fort Bridger State Historic Site
Wind River Indian Reservation	Fossil Butte National Monument
Snake River Canyon	Afton
Hot Springs State Park	Star Valley
Riverton	Bridger-Teton National Forest
Cody Night Rodeo	Other (Specify)
National Bighorn Sheep Center	

Q20. Thinking about your overall travel experience on this trip to Wyoming, would you say it was...

1. Excellent
2. Very Good
3. Good
4. Fair
5. Poor

Q21. To better understand the economic impact of tourism, we are interested in finding out the approximate amount of money you and other members of your travel party spent on your trip to Wyoming. Please estimate how much you spent on each of the following and enter the amounts in whole dollars in the boxes provided. Please only estimate expenditures while you were in Wyoming.

a. Lodging ________
b. Meals/Food/Groceries ________
c. Entertainment (such as admission for events or attractions) ________
d. Activities (including park entrance fees and equipment rental) ________
e. Shopping ________
f. Transportation ________
g. Other ________

Q22. These last few questions are for classification purposes only so that we may group your responses with those of others.

Q23. Are you...?

1. Married
2. Divorced/Separated
3. Widow
4. Single/Never married

Q24. Including yourself, how many people are currently living in your household?__________

Q25. How many living in your household are children under the age of 18? ______________

Q26. Which of the following categories best represents the last grade of school you completed?

1. High school or less
2. Some college or technical school
3. College Graduate
4. Post graduate degree

Q27. Which of the following categories best represents the total annual income for your household before taxes?

1. Less than $35,000
2. $35,000 but less than $50,000
3. $50,000 but less than $75,000
4. $75,000 but less than $100,000
5. $100,000 or more

Q28. What is your age please? ______________

Q29. Are you...?

1. Male
2. Female