



FY 2016 West Virginia Image & Advertising Accountability Research

December 2016

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Introduction



- ⦿ Longwoods International was retained to undertake an evaluation of West Virginia's tourism advertising campaign.
 - ⦿ *Longwoods evaluated the former campaign in a 2014 study.*
- ⦿ **This report presents the detailed study findings as they relate to:**
 - ⦿ *West Virginia's image as a travel destination vs. its key competitors*
 - ⦿ *The impact of the advertising on West Virginia's image as a travel destination*
 - ⦿ *The bottom-line impacts of the campaign*

Purpose



- ① **The research was designed to provide:**
 - ② *Strategic image data*
 - *What are the image factors and attributes that are important in destination selection?*
 - *What is West Virginia's image as a travel destination versus key competitors: Ohio, Pennsylvania, Virginia, Maryland, and North Carolina?*
 - ③ **A measure of both short-of-sales and bottom-line impacts of West Virginia's tourism advertising:**
 - *Awareness/recall of the FY 2016 campaign*
 - *Incremental short-term trips to West Virginia during and immediately following the advertising campaign*
 - *Incremental trips planned for the following year*
 - *Spending in West Virginia by the incremental visitors*
 - *Direct taxes generated by that spending*

Methodology



- ⦿ The study surveyed travelers in West Virginia's advertising markets:
 - ⦿ *A **traveler** is defined as a person who has taken a day or overnight pleasure trip within the past 3 years, and intends to take one within the next two years. (66% of those screened met these requirements.)*
- ⦿ The study was conducted via a major online consumer sample in the U.S.:
 - ⦿ *The sample was selected to be representative of the markets being surveyed (West Virginia, Pennsylvania, Virginia, Maryland, Ohio, Kentucky, North Carolina, Michigan and Washington, DC)*
 - ⦿ *A total of **1,512** travelers participated in the study*
 - ⦿ *Data was weighted prior to analysis based on age, gender, income, household size, and market size.*

Methodology (Cont'd)



- ⦿ The questionnaire included:
 - ⦿ *Travel history*
 - ⦿ *Image of West Virginia and its competitors (Ohio, Pennsylvania, Virginia, Maryland, North Carolina) as a travel destination on a battery of 54 attributes*
 - ⦿ *Awareness of West Virginia's tourism ads: Respondents were exposed to actual copies of the ads.*

Executive Summary

Trip Planning



- ◉ 62% plan their leisure trip 2 months or less from the start of the trip. This planning cycle is shorter than seen in 2014. (slide 27)
- ◉ **In-state residents planning cycle is slightly longer.**
- ◉ The main trip planning information sources are (slide 29):
 - ◉ *Hotel websites*
 - ◉ *Personal experience*
 - ◉ *Online booking engines, e.g. Expedia or Travelocity*
 - ◉ *Advice from relatives or friends*
 - ◉ *A hotel or resort*

Past and Future Visitation to West Virginia



- ◉ 47% of respondents have experienced West Virginia at least once. West Virginia visitation is lower than the visitation of the competitive states of Pennsylvania, Virginia, North Carolina, and Ohio but higher than Maryland. (slide 31)
- ◉ 44% indicate they plan an overnight or day visit to West Virginia in the next year. This level is higher than 2014. (slide 33)
- ◉ West Virginia residents are twice as likely to visit West Virginia in the next year as out-of-state residents. (slide 35)

Image Hot Buttons



- In order for a destination to get on the wish list, it must be perceived, first and foremost, to be an exciting place, one that adults, and families will enjoy (slides 37-38):
 - *An **exciting** place is a once-in-a-lifetime destination that offers a sense of fun and adventure.*
 - *An **adult destination** is one that is appealing to adults traveling alone and couples.*
 - *A **family destination** is one that is good place for families to visit and plenty of things for kids to enjoy.*
- Also relatively important determinants of destination choice are the perceptions that a place is **luxurious** with first class hotels/resorts, is **unique**, with interesting scenery, dining and lodging experiences, and a **worry-free** atmosphere, which means perceived safety, plus a sense of relaxation, and welcoming atmosphere. (slides 37-38)

Image Hot Buttons (Cont'd)



- For a state destination like West Virginia and its competition to be on consumers' radar, several aspects are of moderate importance (slides 37-38):
 - *Opportunities for **sightseeing**, especially the variety of things to see and do.*
 - ***Popularity** – people like to travel to places that are well-known and that they see being advertised.*
 - ***Entertainment** options, ranging from shopping to live performances and nightlife.*

Image Hot Buttons (Cont'd)



- Of least importance at the “wish list” stage of travel planning are a destination’s image for (slides 37-38):
 - ***Climate***
 - ***Sports and recreation***
 - ***Affordability***
- Nonetheless, affordability tends to move closer to the top of the priority list, the closer consumers come to making up their minds on a destination, as the cost and time/travel distance factors play a greater role in travel decisions.

West Virginia's Image



- In this survey, respondents were asked to evaluate West Virginia versus several competitors – Ohio, Pennsylvania, Virginia, Maryland, and North Carolina.
- On an overall basis, relative to these other destinations combined, West Virginia is perceived with mixed results:
 - *46% agreed that West Virginia is a place they “would really enjoy visiting,” compared to 53% for the other destinations. West Virginia’s rating is in the middle of the competitive set. (slide 40)*
 - ***For the measure of “value for money” (46% vs. 45%), West Virginia is higher than all states except North Carolina. (slide 41)***

West Virginia's Image



- In the markets we surveyed, West Virginia's perceived edge versus this competitive set is mainly on dimensions related to its sports & recreation activities and *beautiful and unique scenery*. As well as being *safe to travel* and having *affordable accommodations*. (slides 42-86)
- Compared to the combined competition, West Virginia is perceived to have a few shortcomings (slides 42-86):
 - *Well-known destinations*
 - *Well-known landmarks*
 - *Exciting nightlife, and great for theater and performing arts*
 - *A variety of dining options*
 - *Excellent shopping*

West Virginia's Product vs. Image



- When a comparison of how recent visitors evaluate West Virginia versus those who have never visited West Virginia, visitors are especially impressed with West Virginia for the travel motivators of (slides 88-92):
 - *Exciting, Affordable, and Worry-free*
- And for the specific attributes of :
 - *Easy/affordable to get there*
 - *A fun place and real adventure*
 - *Options for recreation including hunting, skiing/snowboarding, whitewater rafting*
 - *Being a must see destination*
 - *A place that is welcoming*
- There were no areas where West Virginia was rated significantly short of expectations. (slides 88-92)

Advertising Awareness



- The FY 2016 campaign reached 48% of travelers in the advertised markets. (slide 95)
- The greatest recall for online ads and television, followed by out-of-home, magazine and social media. (slides 96-100)
- **The advertising significantly improved perceptions of the state on the overall measures of “West Virginia is a place I’d really enjoy visiting” and “West Virginia would provide excellent vacation value for the money.” (slide 102)**

Advertising Impacts



- To assess the impact of the advertising beyond simple recall, we looked at various measures to determine whether people exposed to the campaign were affected in terms of (slides 103-124):
 - *Image of the state as a place to visit, both overall and in detail*
 - *Actual visits taken during the campaign and immediately afterwards*
 - *Intent to visit West Virginia in the next 12 months*

Advertising Impacts



- In fact, people who were exposed to the advertising gave West Virginia substantially better ratings on virtually every image dimension included in the survey. (slides 103-120)
- Of particular note the campaign created a 20-25% lift on many of the key hot buttons that drive destination interest, including being perceived as (slide 117):
 - *A fun place*
 - *Unique vacation experience*
 - *Being a must see destination*
- In addition to boosting West Virginia's image, the campaign significantly elevated interest in visiting the state (slide 124):
 - *Those exposed to ads indicated an additional 3.8 million incremental planned trips to West Virginia in the next 12 months.*

The Bottom Line



- The advertising not only impacted the image measures; but it also generated a substantial amount of actual incremental trip-taking. (slide 122)
 - *The campaign yielded 1.2 million trips to West Virginia that would not have otherwise occurred without the advertising.*
- Longwoods estimates that the campaign generated approximately \$165 million in incremental visitor expenditures. (slide 122)
- These visitor expenditures in turn yielded \$11.9 million in local and state taxes. (slide 122)

Economic Development Image Ratings “Halo Effect”



- Through Longwoods research, a link has been established between tourism advertising and economic development image ratings. This link examination is conducted among out-of-state residents. (slides 126-133)
- West Virginia’s score increases with advertising awareness and visitation. The combination of the two also provides a sizeable lift, especially for the image attributes of “a place to retire” and “a place to attend college.” (slides 126-133)

Conclusions and Recommendations

Conclusions and Recommendations



- On an overall basis, the FY 2016 campaign generated positive outcomes, with bottom-line measures of trips taken and planned trips.
 - *Yielding 1.2 million incremental trips over and above the travel that would have occurred in the absence of advertising. (slide 122)*
- This incremental travel translates into additional visitor expenditures of \$165.3 million when in West Virginia. (slide 122)
- Since the new campaign's launch, the \$1,558,446 in media costs have generated a ROI of \$106 in visitor spending for each ad dollar spent, compared to \$96 in 2014. (slide 122)
- This spending yielded \$11.9 million in taxes or a ROI of \$8 in tax revenue for each dollar spent, compared to \$7 in 2014. (slide 122)

Conclusions and Recommendations



- And we are expecting additional carry-over impacts in the longer term as well, since the advertising had an impact on intended travel:
 - *Producing 3.8 million incremental planned trips to West Virginia in the next 12 months. (slide 124)*
- **When compared to the 2014 results, West Virginia is closing the gap on the travel motivator ratings of the other states.**
- **When those aware of the FY 2016 advertising are compared to those unaware, the differences are remarkably higher. This indicates those seeing the FY 2016 advertising are impacted by it. In 2014, these measured gaps (aware vs. unaware) showed very little difference. (slide 103-120)**

Conclusions and Recommendations

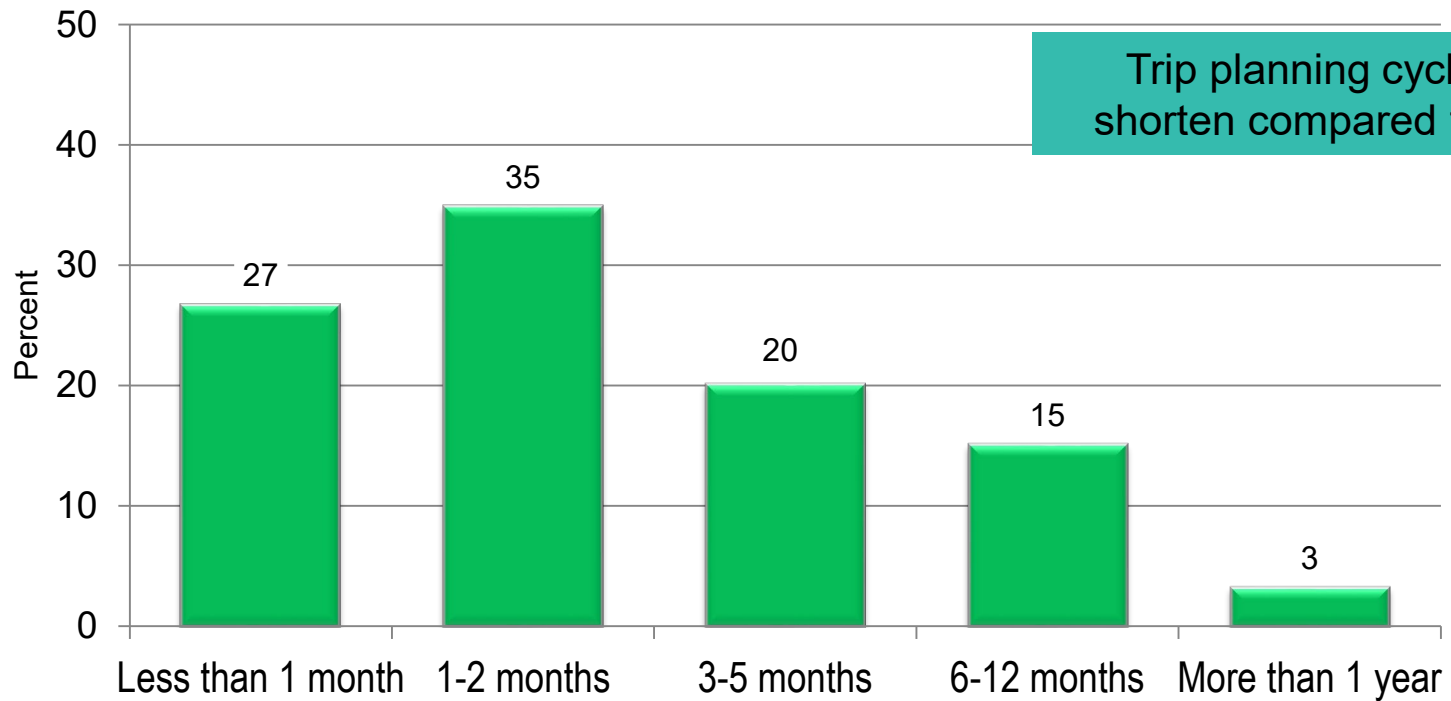


- The top attributes for which the FY 2016 campaign had the greatest impact include the hot buttons of *a fun place*, *unique vacation experience*, and *must see destination*. The FY 2016 results of these top attributes compared to the same attributes in 2014 are significantly higher. (slides 117-120)
- The impact of tourism advertising goes beyond generating visitors to come to West Virginia. (126-133)
 - ***The combination of advertising awareness and visitation raises West Virginia's image on key economic measures.***
- “Wild, Wonderful West Virginia” campaign also impacts economic development.

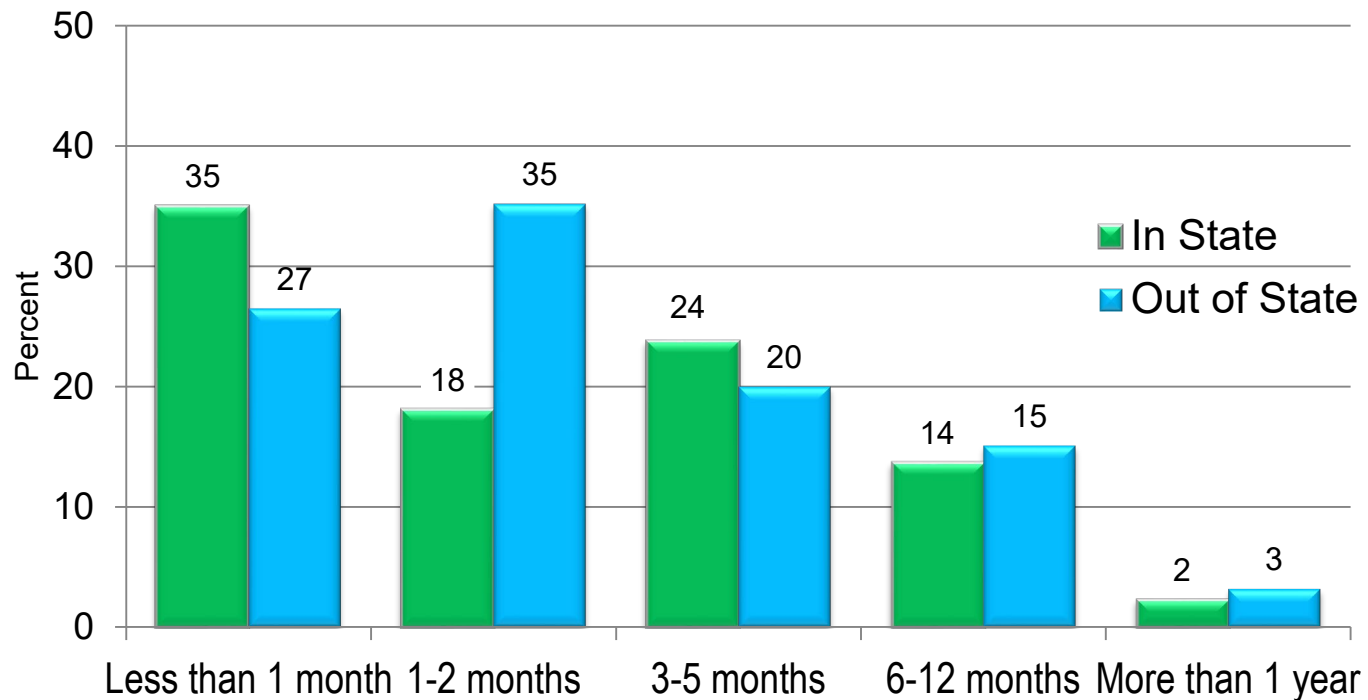
Main Findings

Trip Planning

Planning Cycle



Planning Cycle – In State vs. Out of State



Information Sources Used for Planning

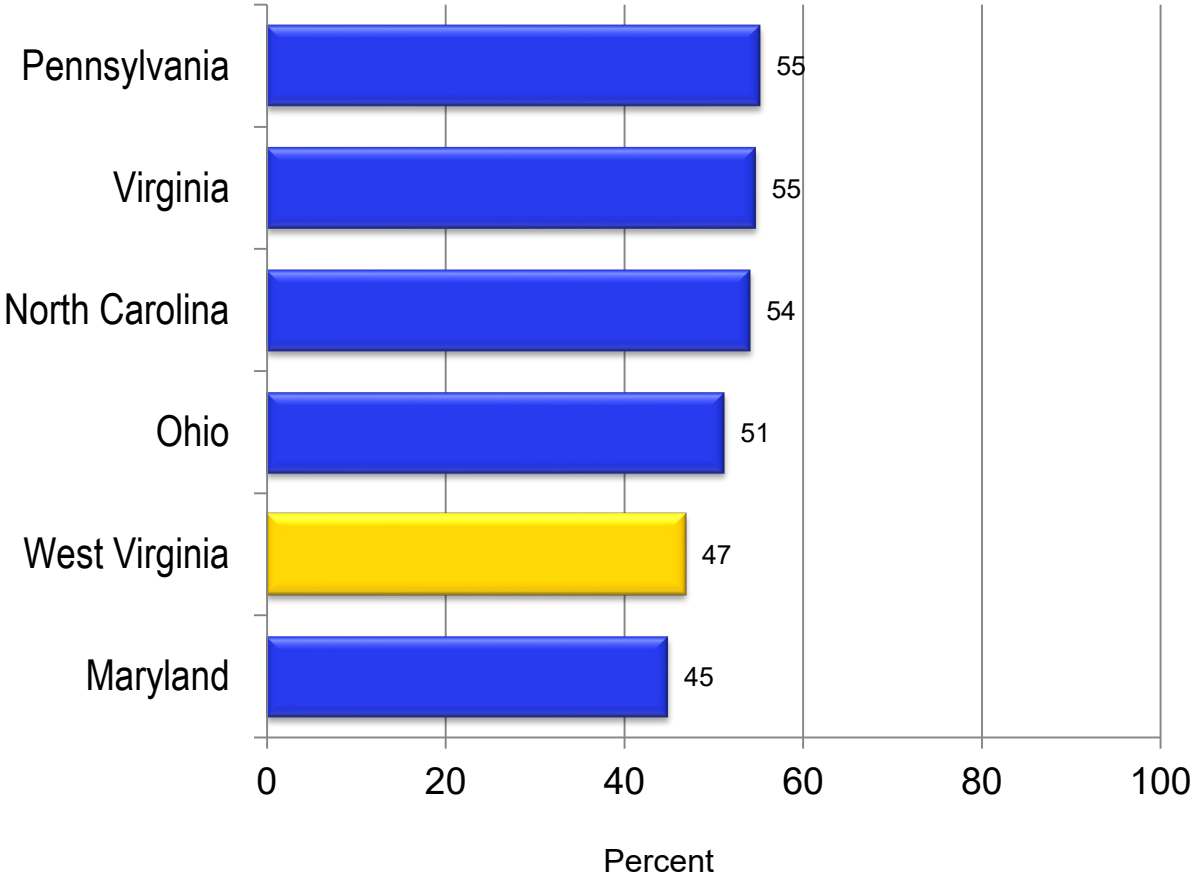


Destination Past Visitation & Interest

Ever Visited WV



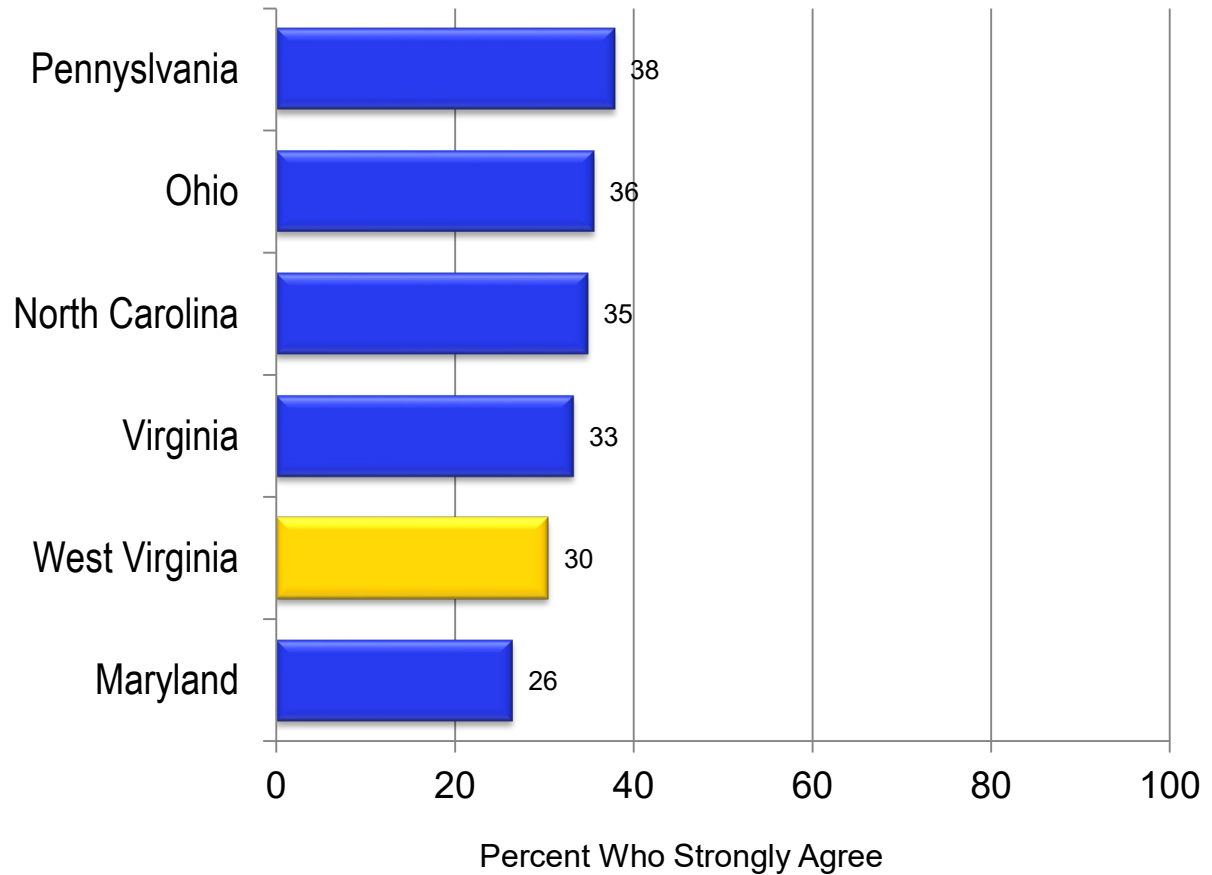
Base: Total Travelers



Visited WV in Past 2 Years



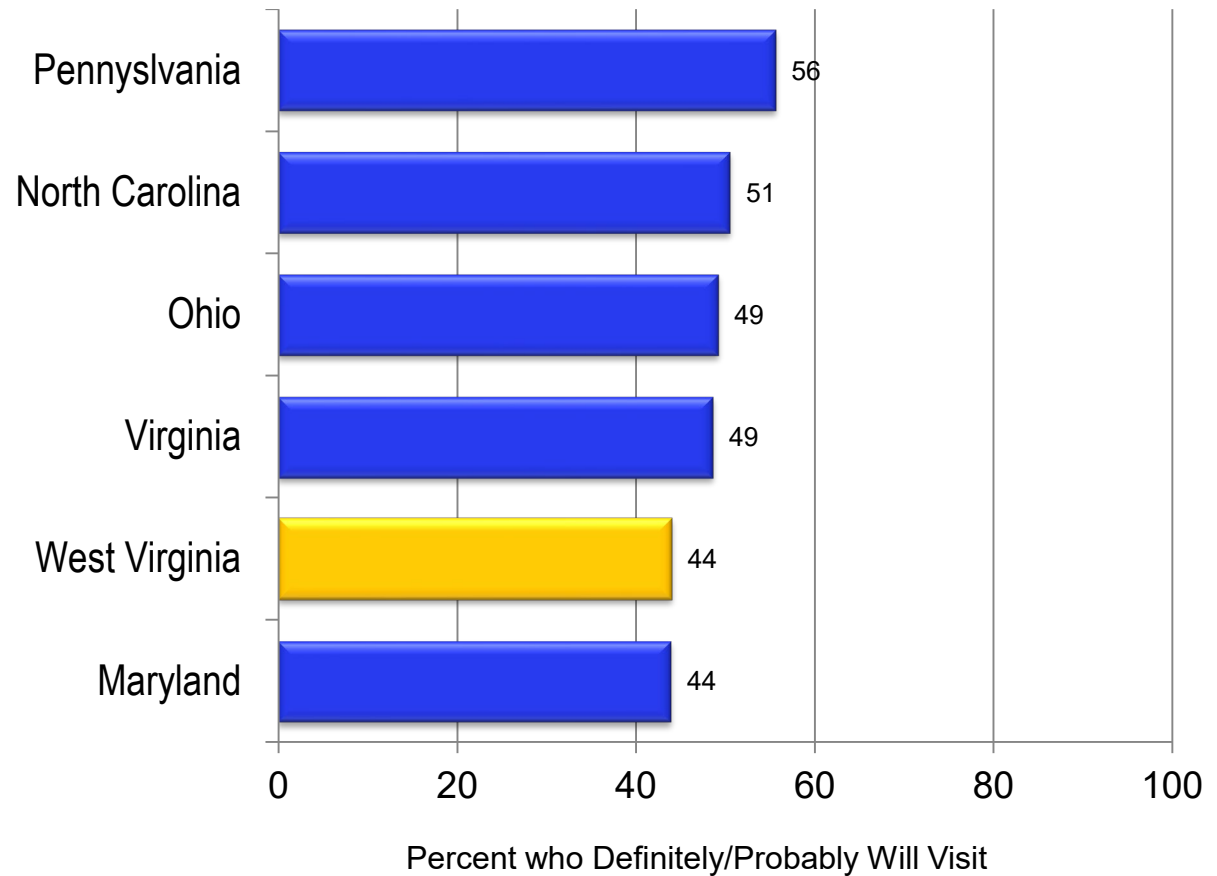
Base: Total Travelers



Intent to Visit WV in the Next Year



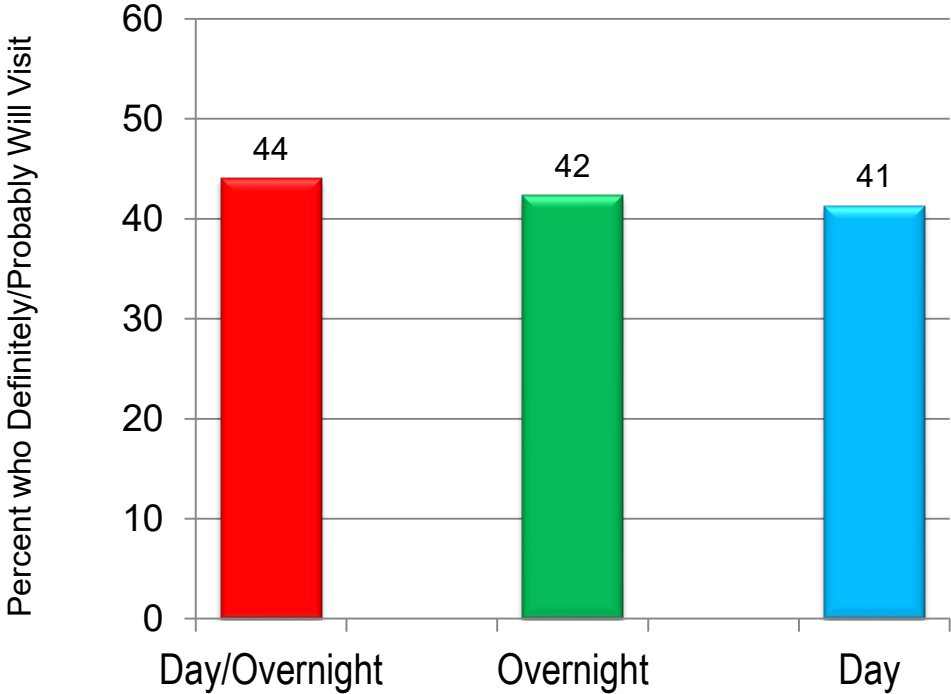
Base: Total Travelers



Intent to Visit West Virginia in the Next Year



Base: Total Travelers

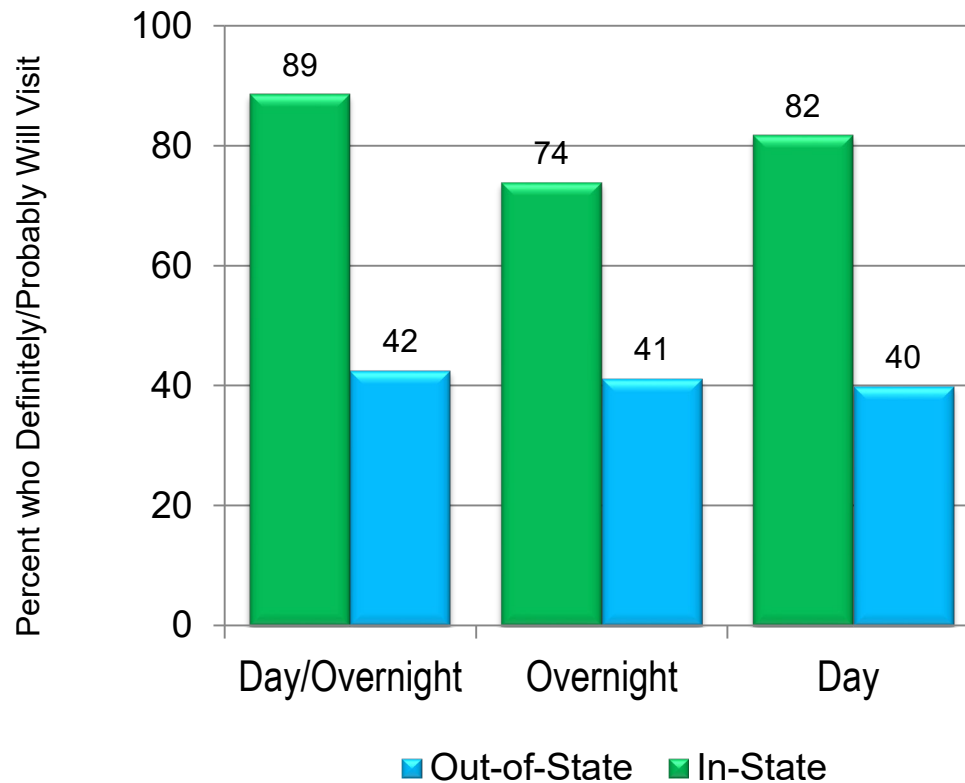


Intention to visit West Virginia is higher than 2014.

Intent to Visit West Virginia in the Next Year – In-State vs. Out of State

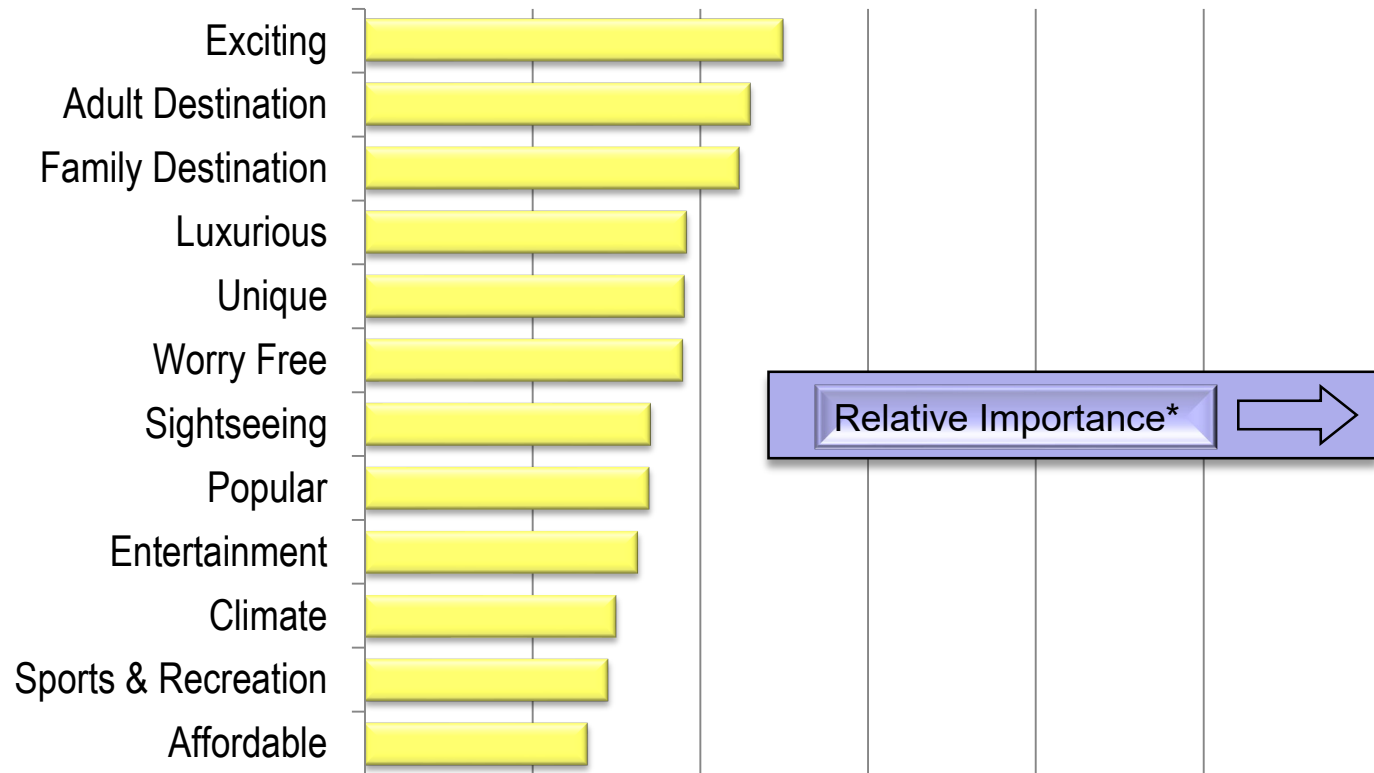


Base: Total Travelers



Travel Motivators and Hot Buttons

Travel Motivators



*A measure of the degree of association between each factor and whether destination is a place "I would really enjoy visiting."

*Travel motivators are the top line image attributes, out of more than 50 measured.

Hot Buttons



Top 10 Hot Buttons

A fun place

Must see destination

Lots of things to see and do

An exciting place

Good place for families to visit

Unique vacation experience

Good for an adult vacation

Good for couples

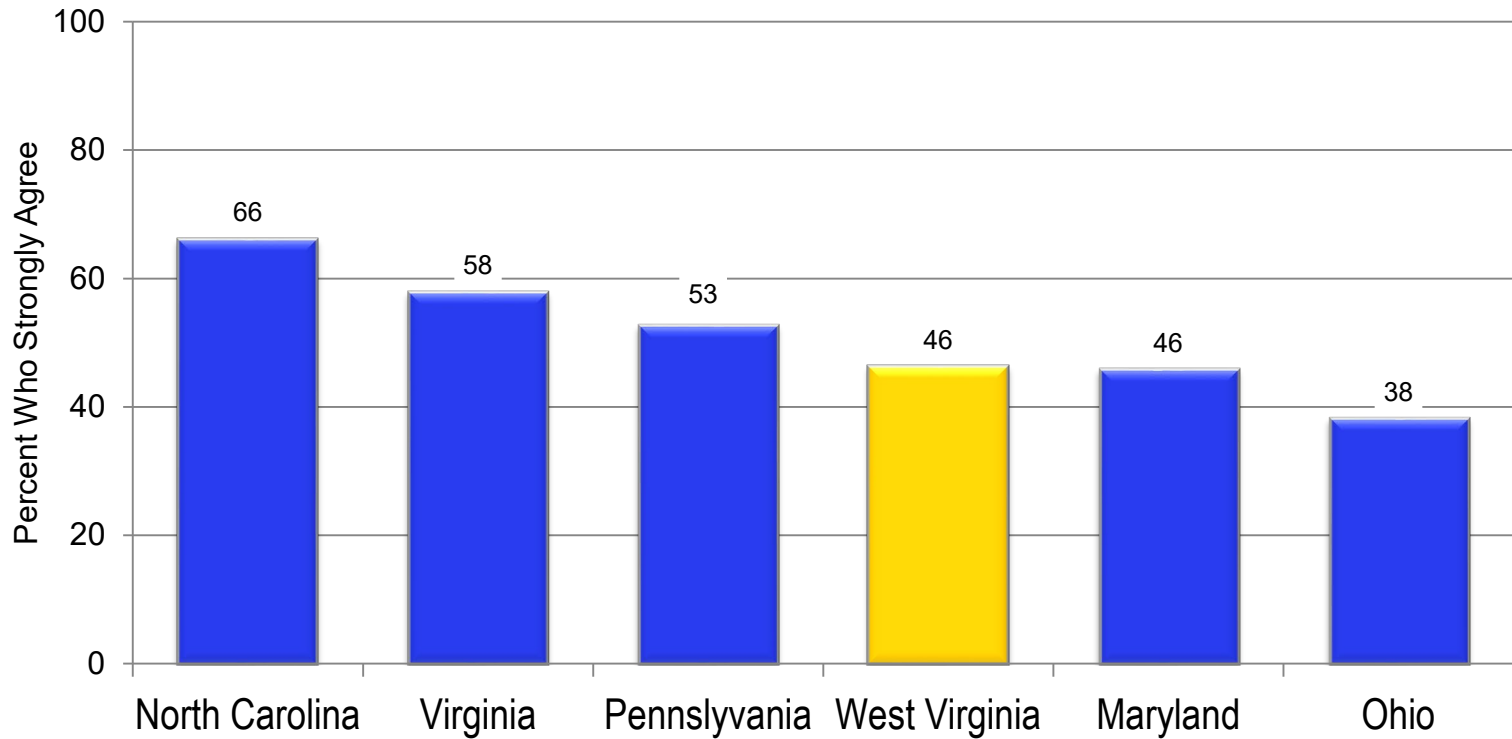
A real adventure

A place I would feel welcome

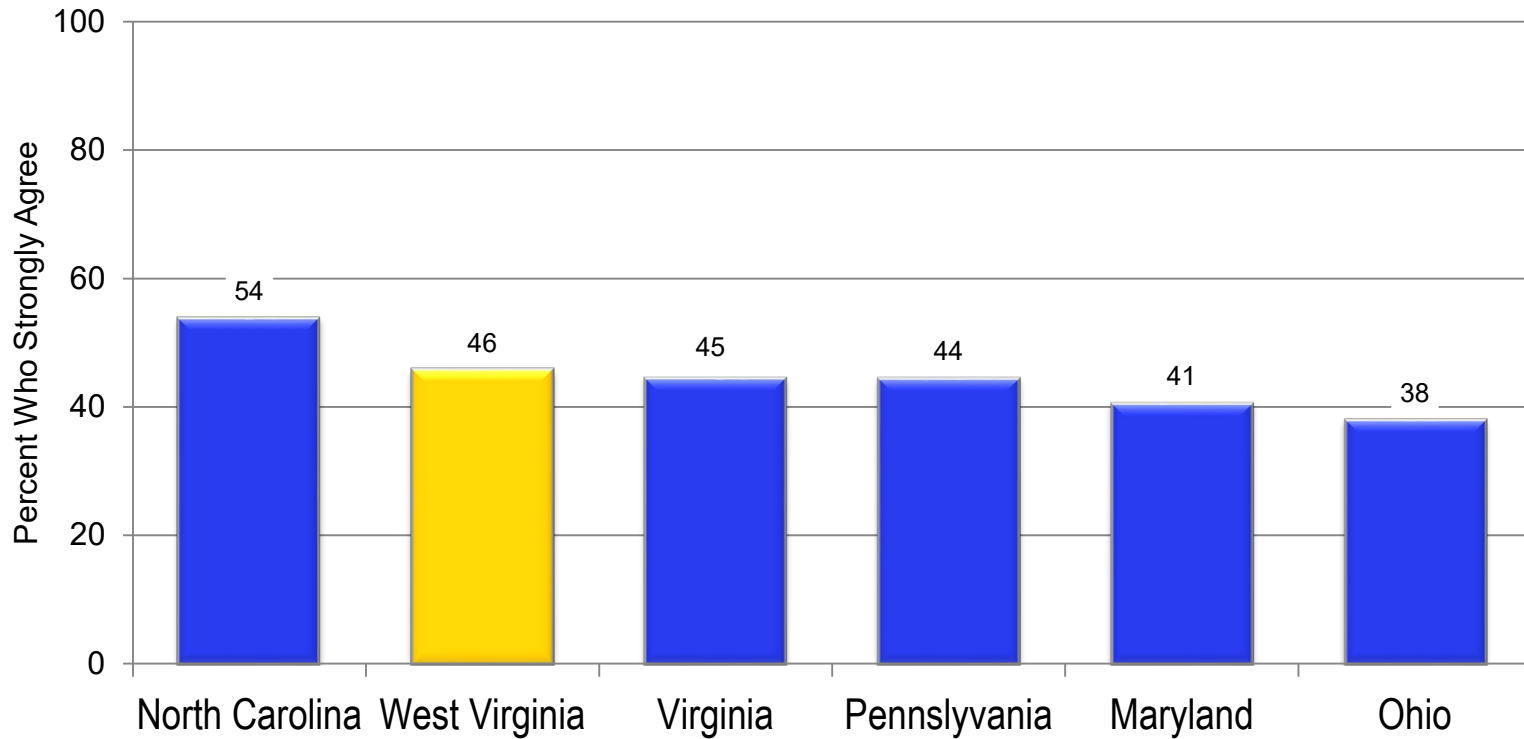
*Hot Buttons are the top decision making factors used by those in our market areas to decide where to take their next vacation.

West Virginia's Image vs. the Competition

West Virginia's Overall Image vs. Competitors — “A Place I Would Really Enjoy Visiting”



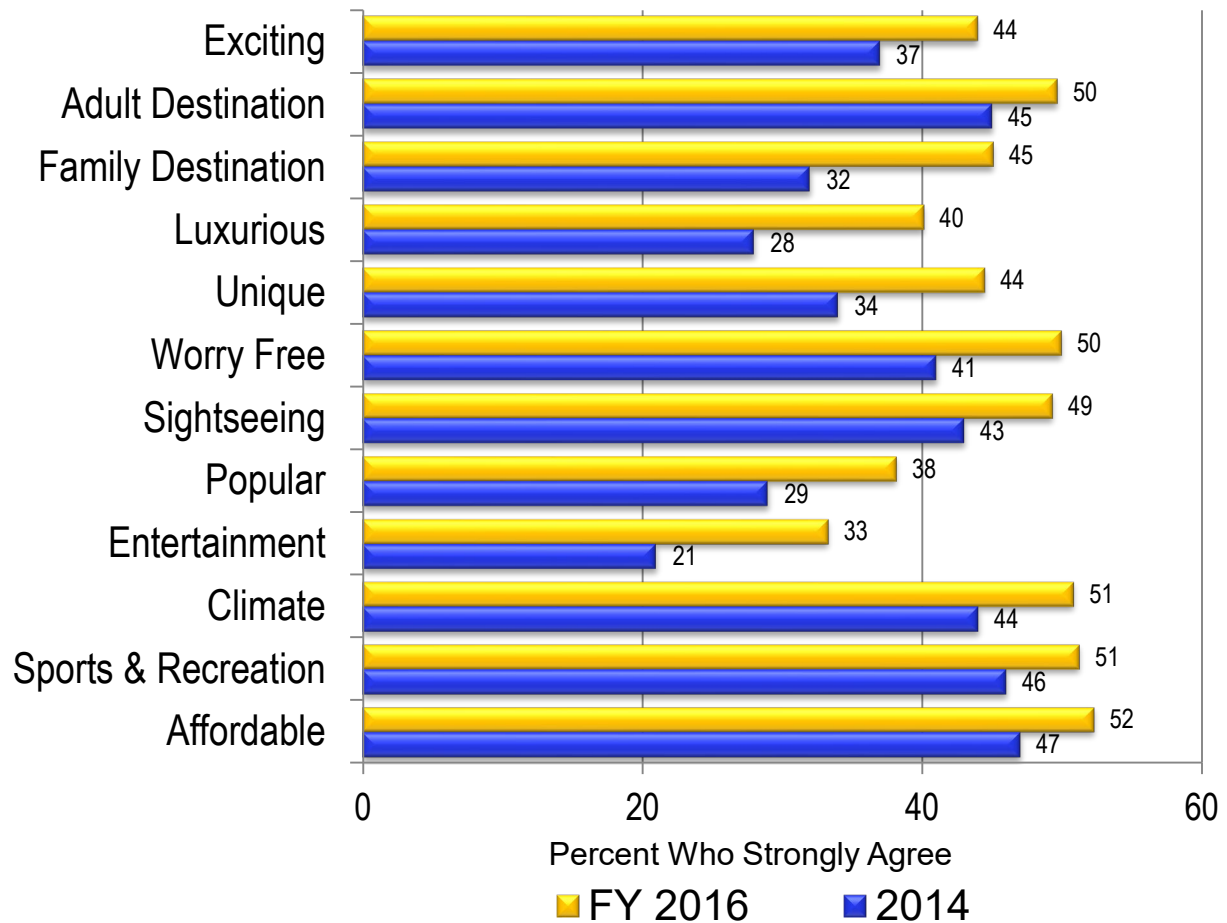
West Virginia's Overall Image vs. Competitors — “Excellent Value For the Money”



West Virginia's Image FY 2016 vs. 2014



Base: Total Travelers

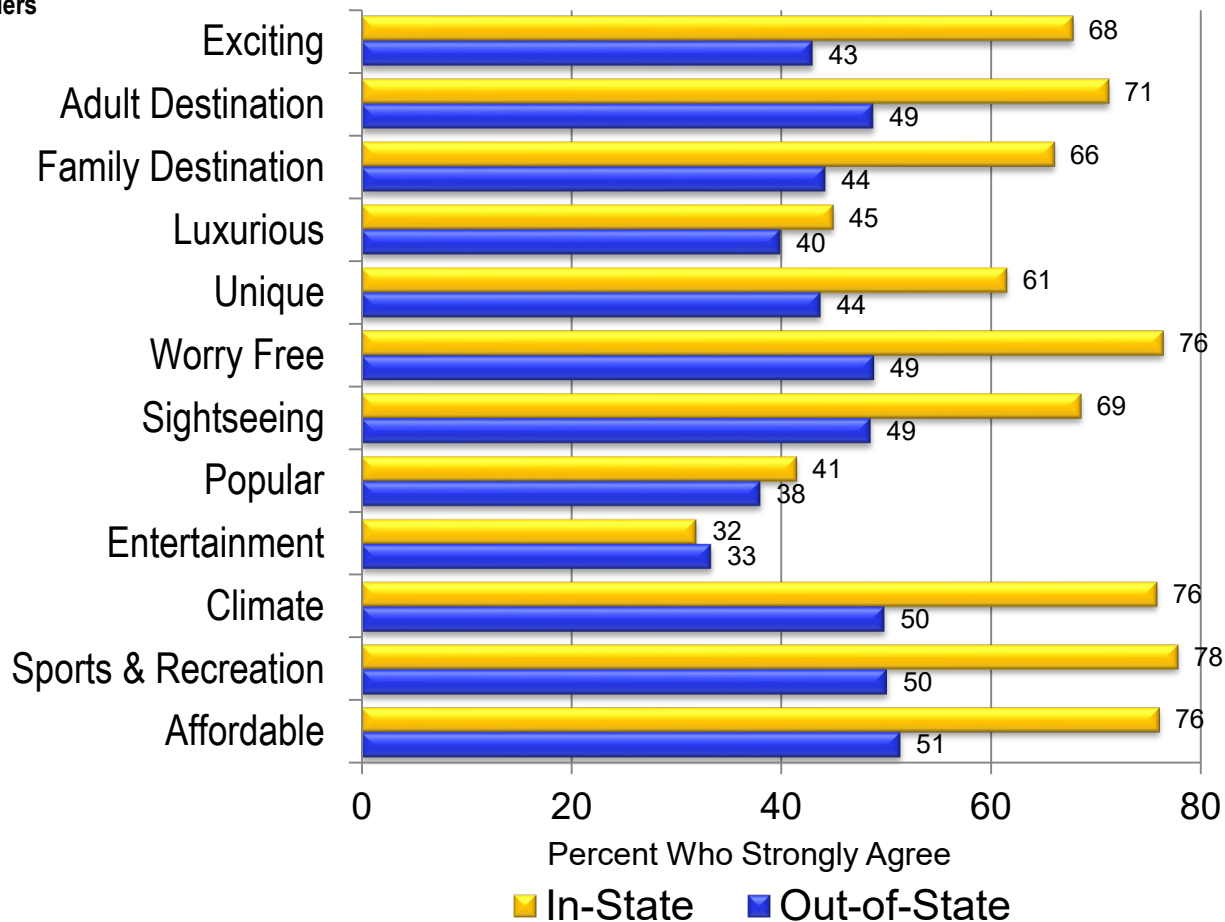


West Virginia's Image In-State vs. Out-of-State



Base: Total Travelers

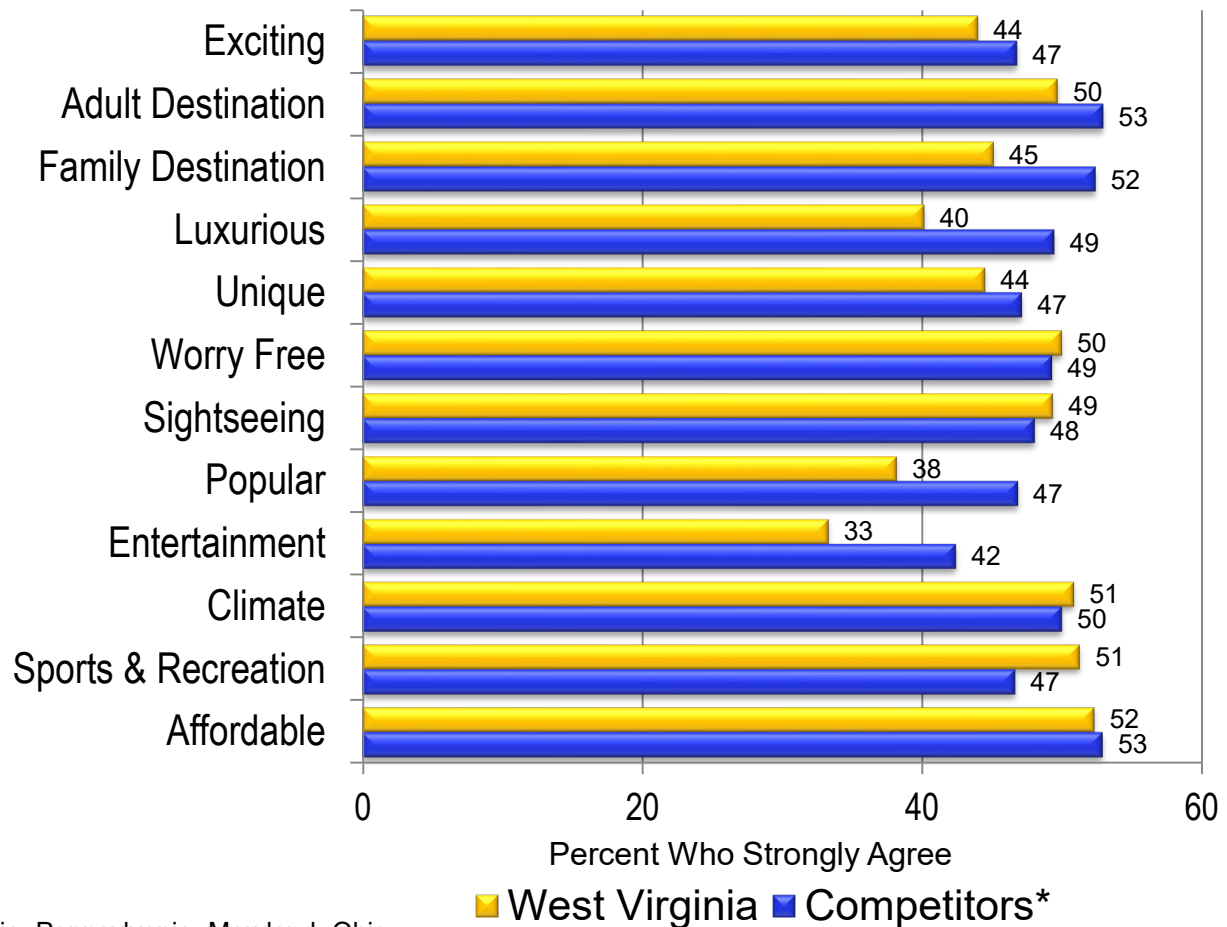
Relative Importance*
↑



West Virginia's Image vs. Competitors



Base: Total Travelers

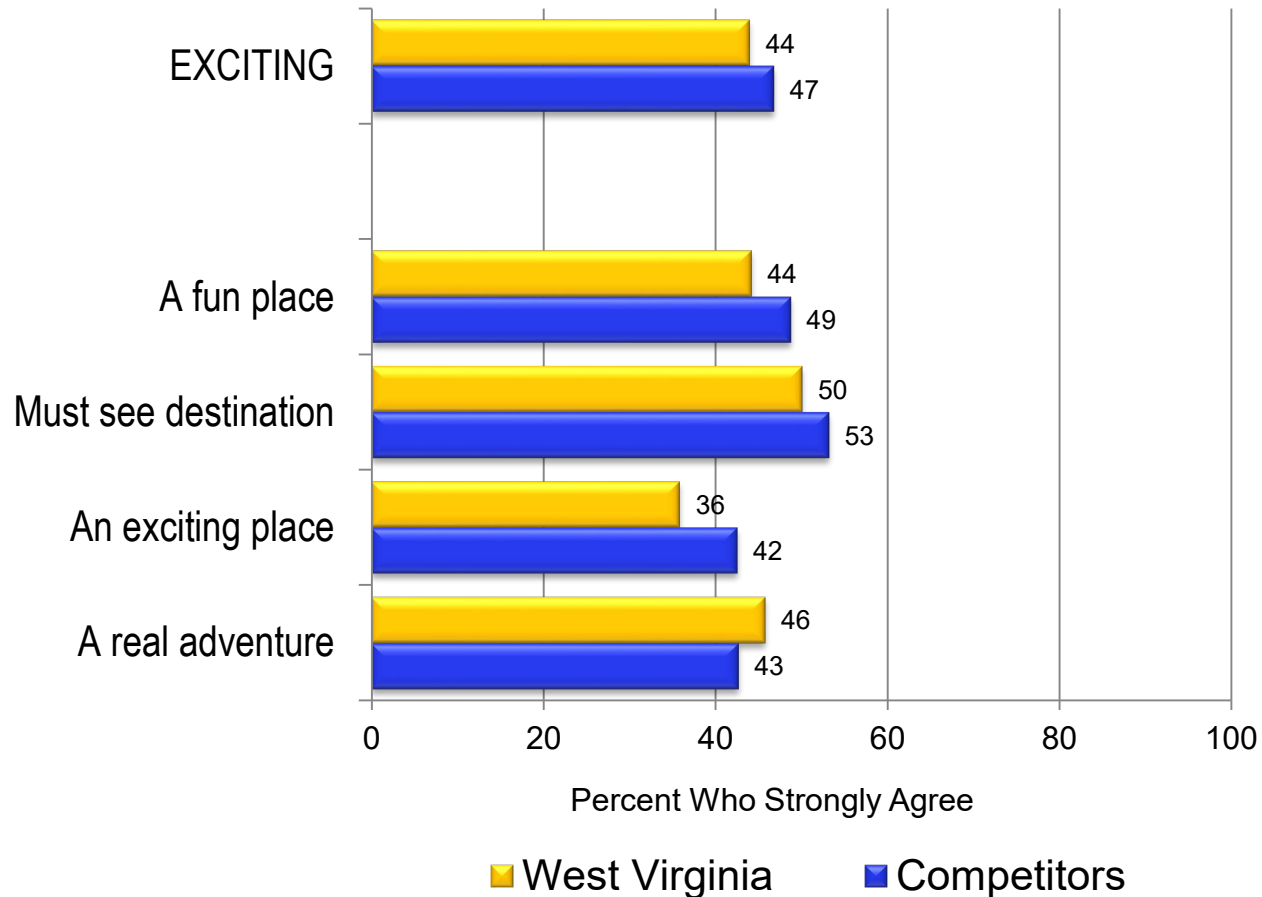


*Competitors: North Carolina, Virginia, Pennsylvania, Maryland, Ohio

West Virginia Image vs. Competitors — Exciting



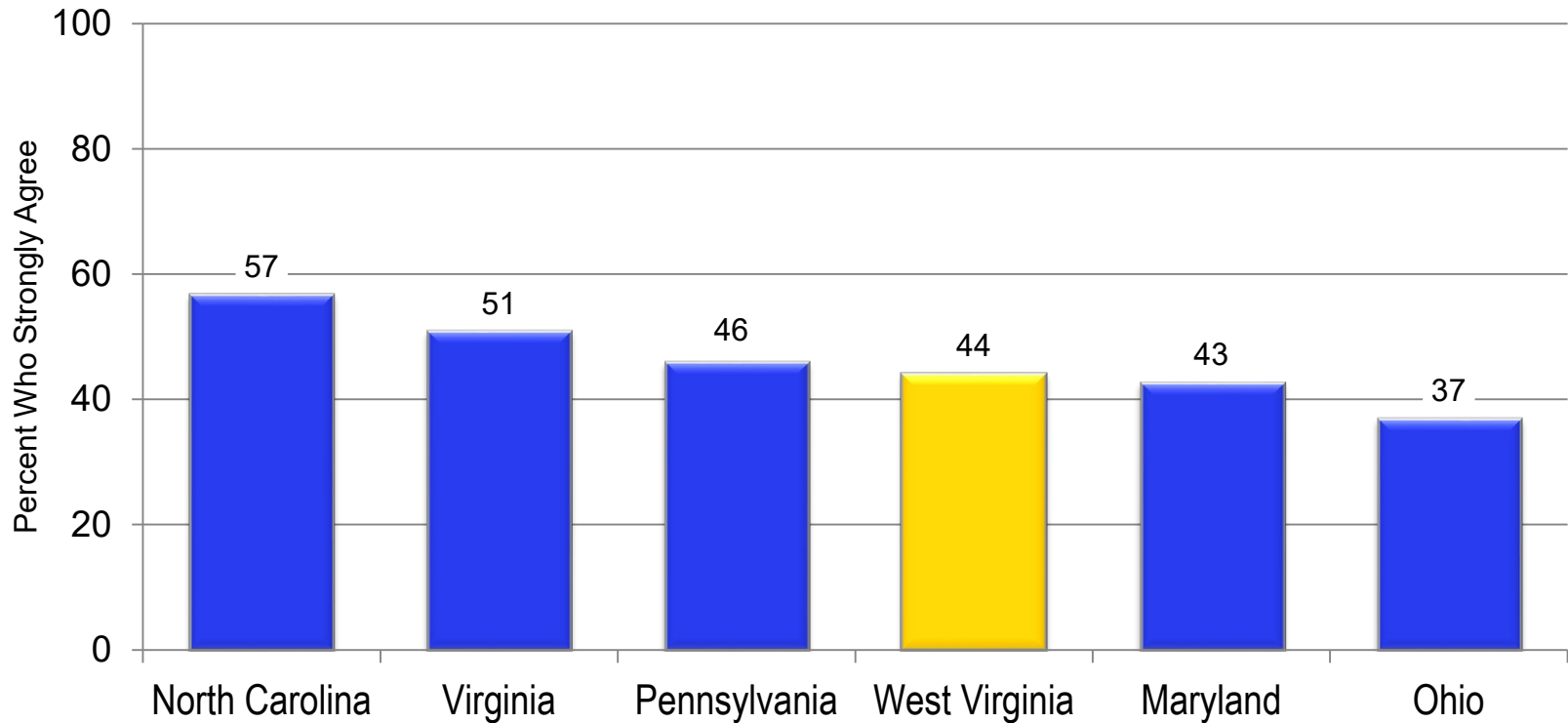
Base: Total Travelers



West Virginia Image vs. Competitors — Exciting



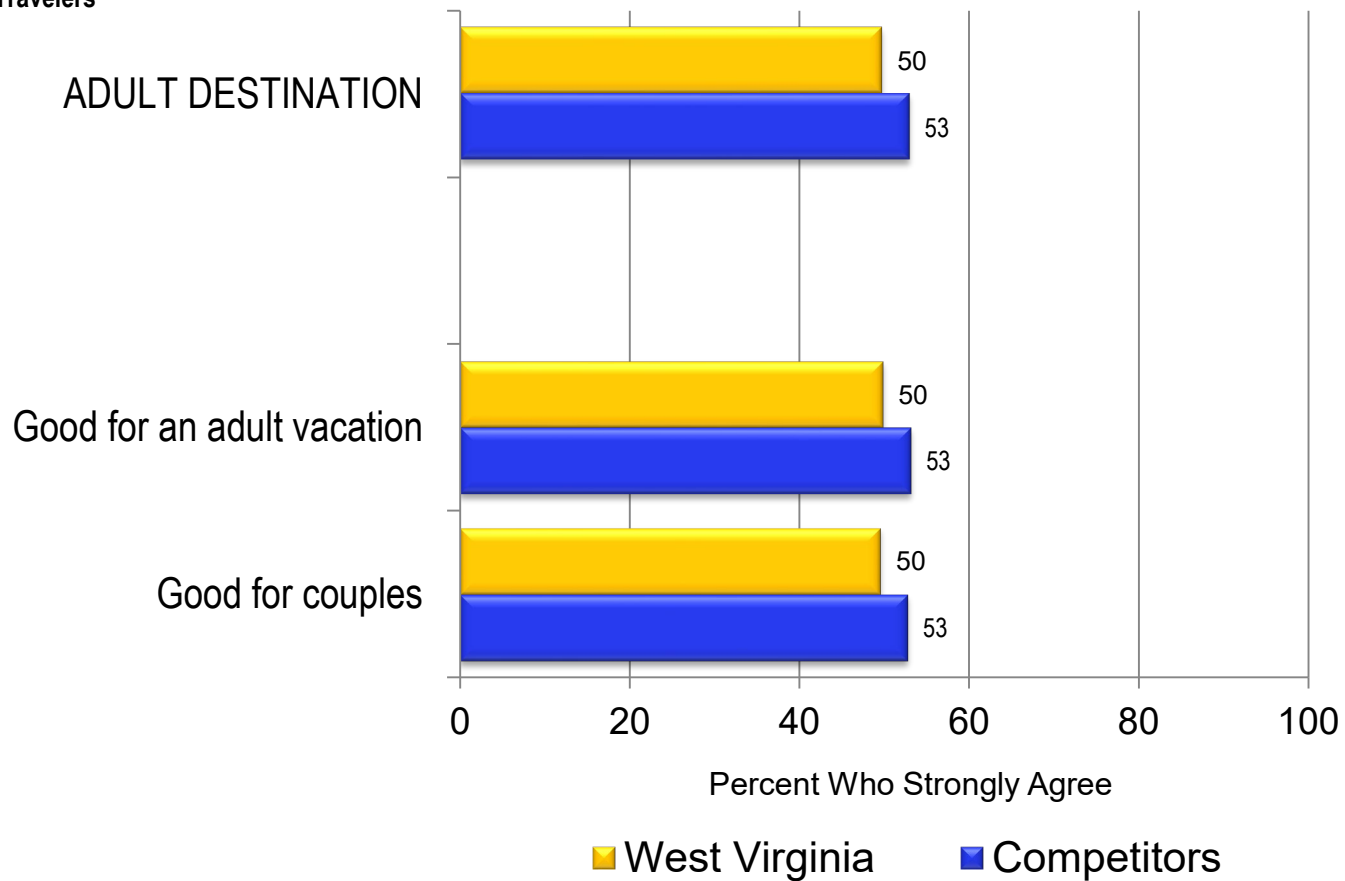
Base: Total Travelers



West Virginia Image vs. Competitors — Adult Destination



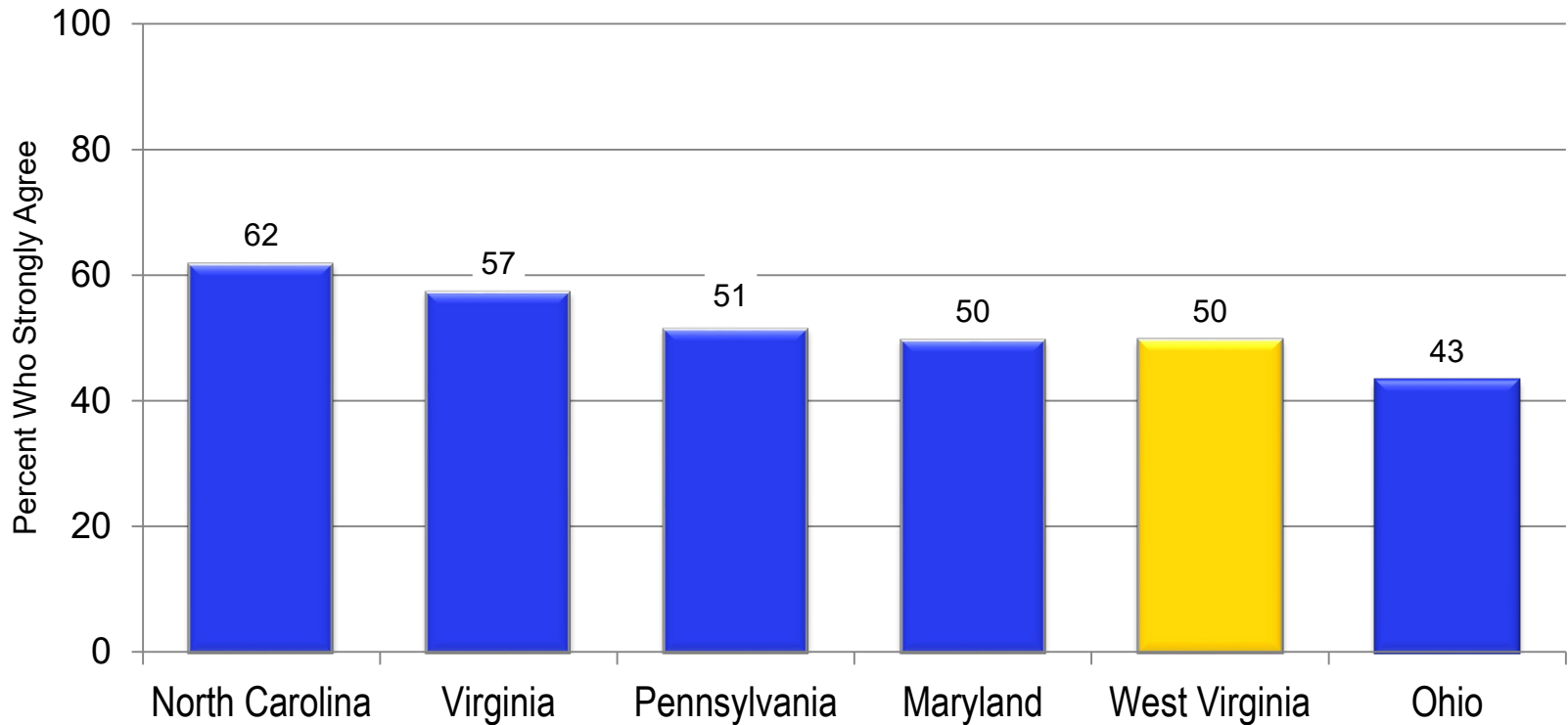
Base: Total Travelers



West Virginia Image vs. Competitors — Adult Destination



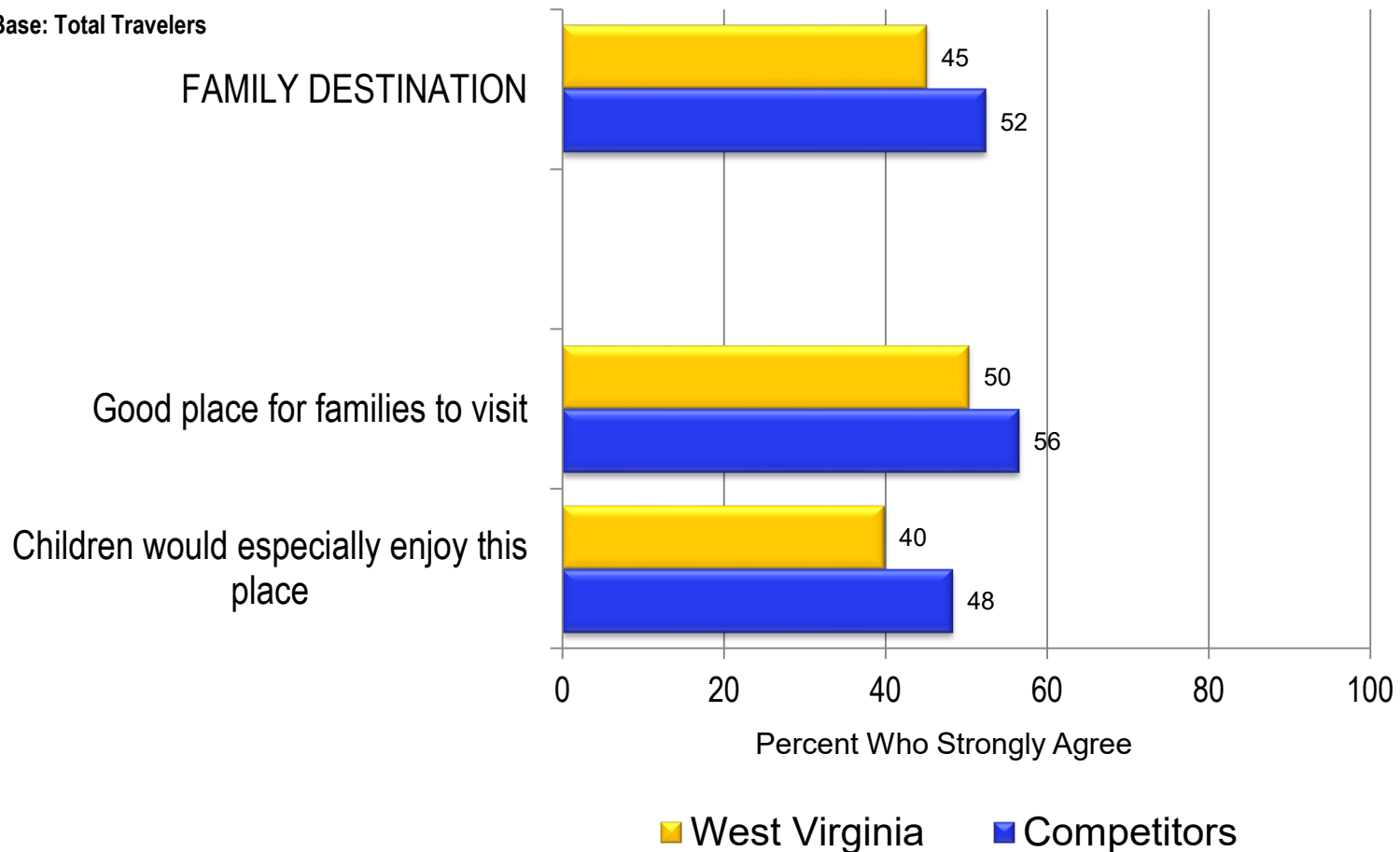
Base: Total Travelers



West Virginia Image vs. Competitors — Family Destination



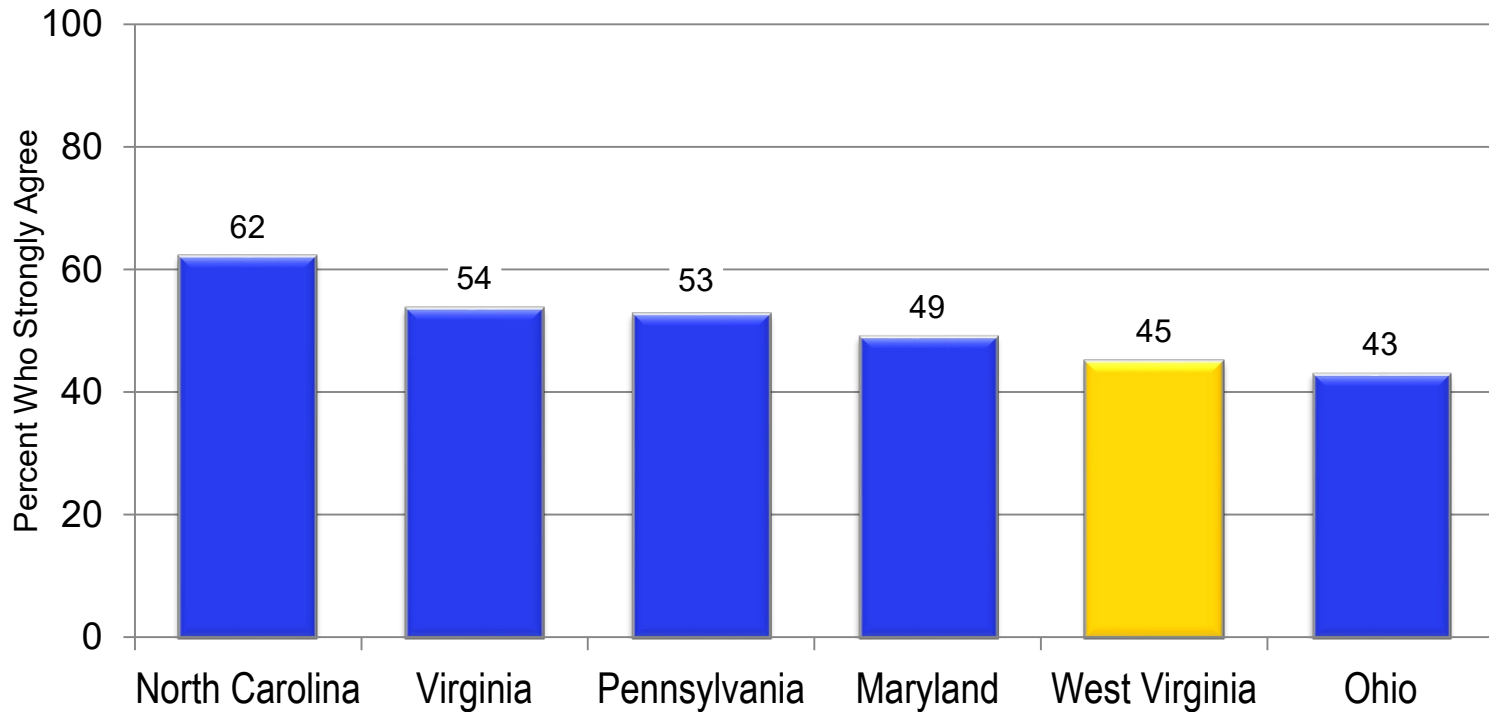
Base: Total Travelers



West Virginia Image vs. Competitors — Family Destination



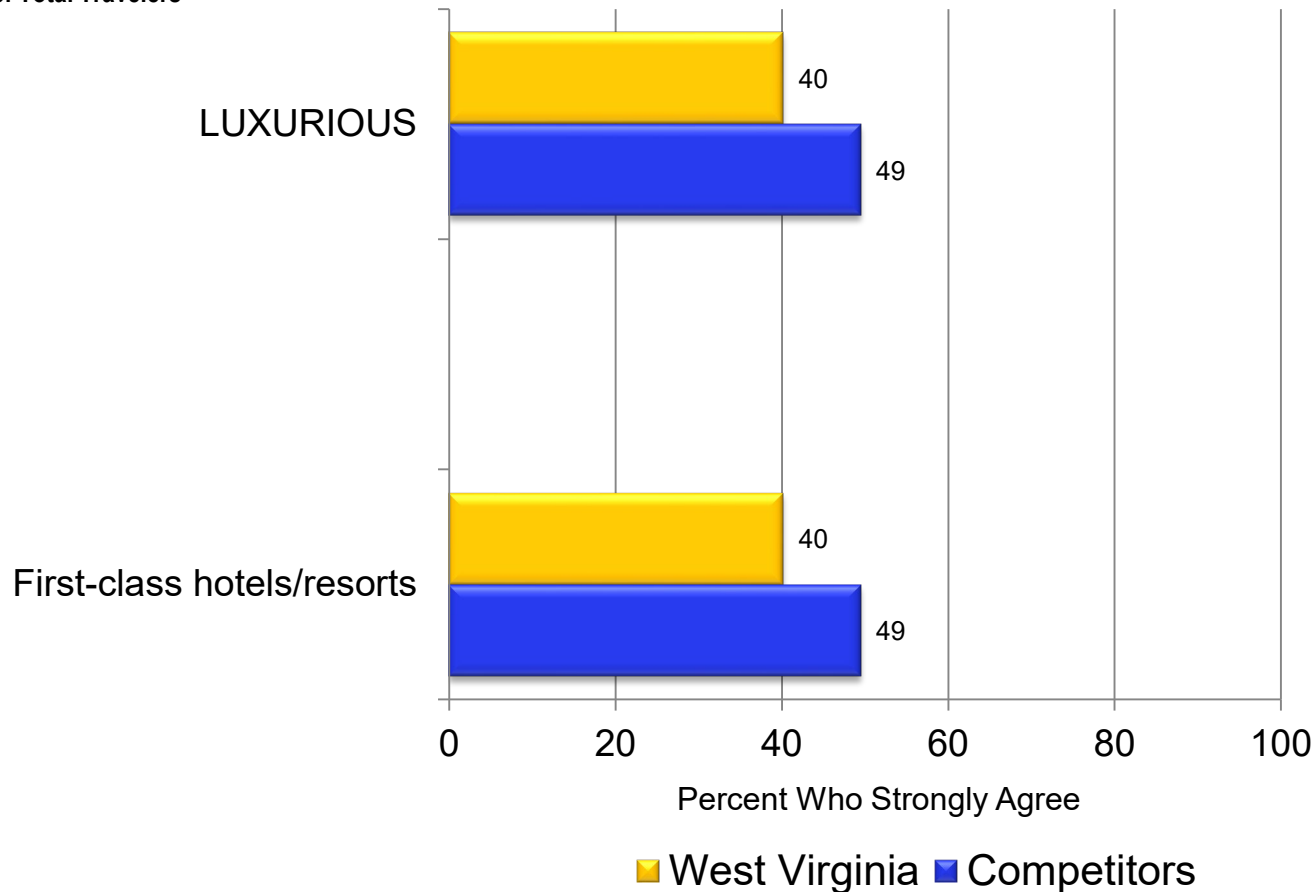
Base: Total Travelers



West Virginia Image vs. Competitors — Luxurious



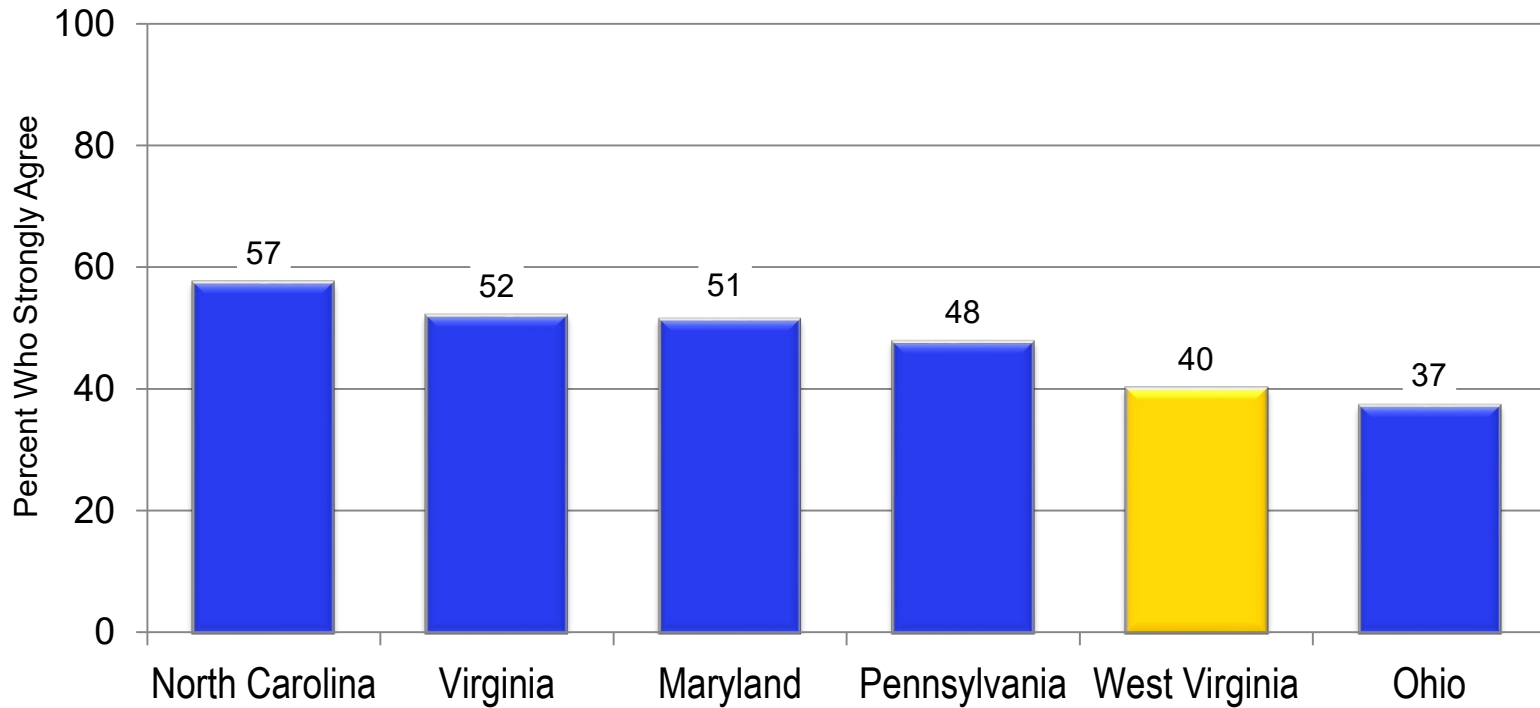
Base: Total Travelers



West Virginia Image vs. Competitors — Luxurious



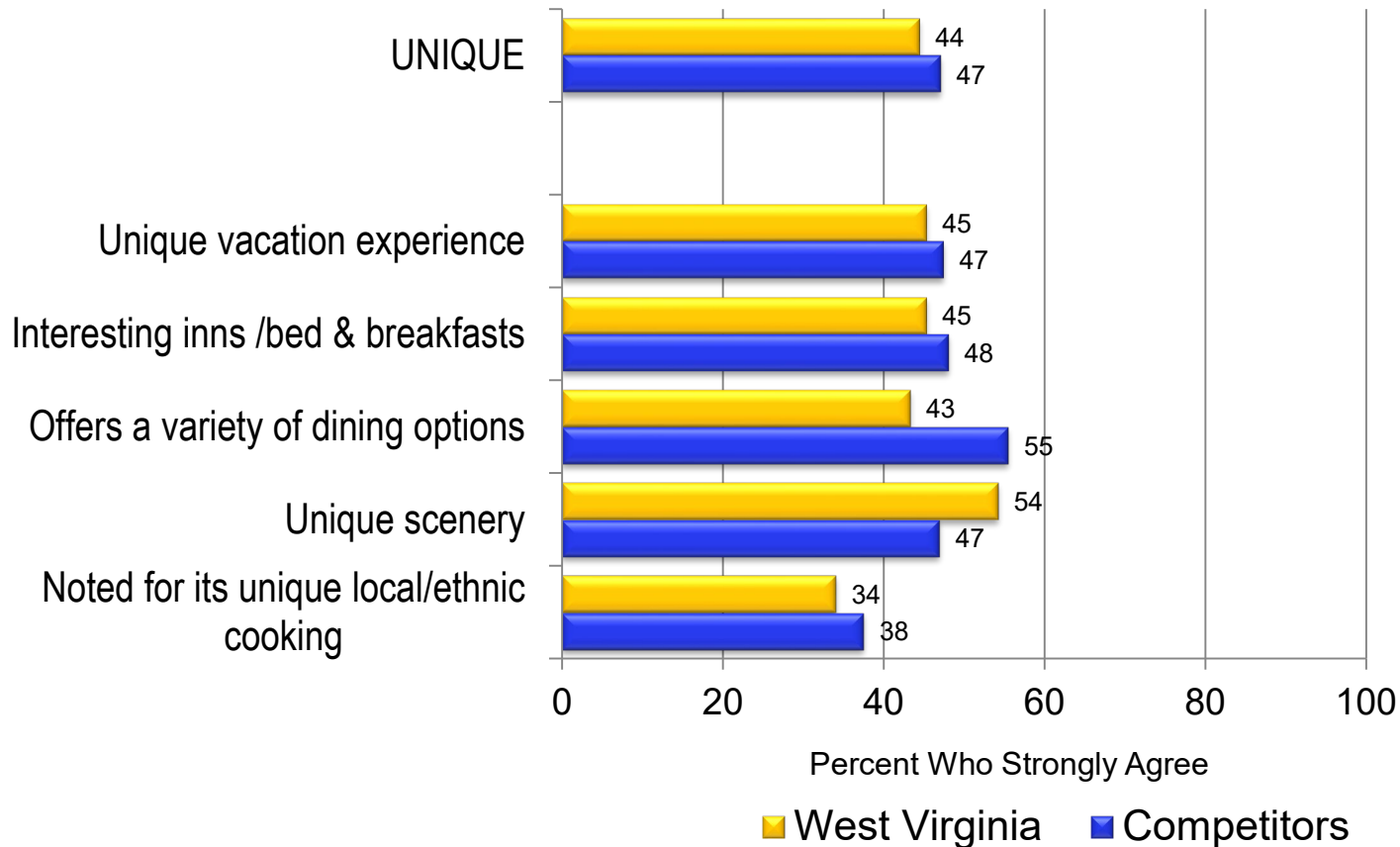
Base: Total Travelers



West Virginia Image vs. Competitors — Unique



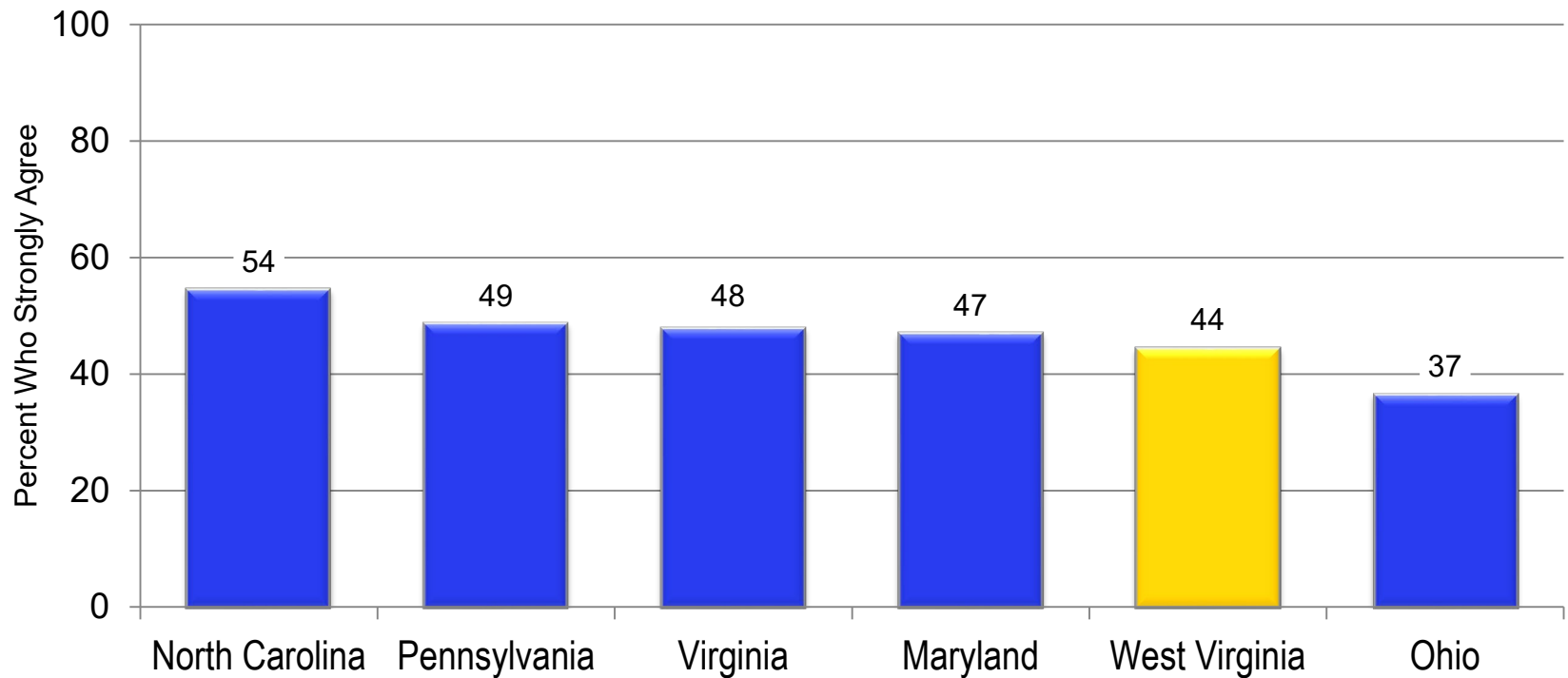
Base: Total Travelers



West Virginia Image vs. Competitors — Unique



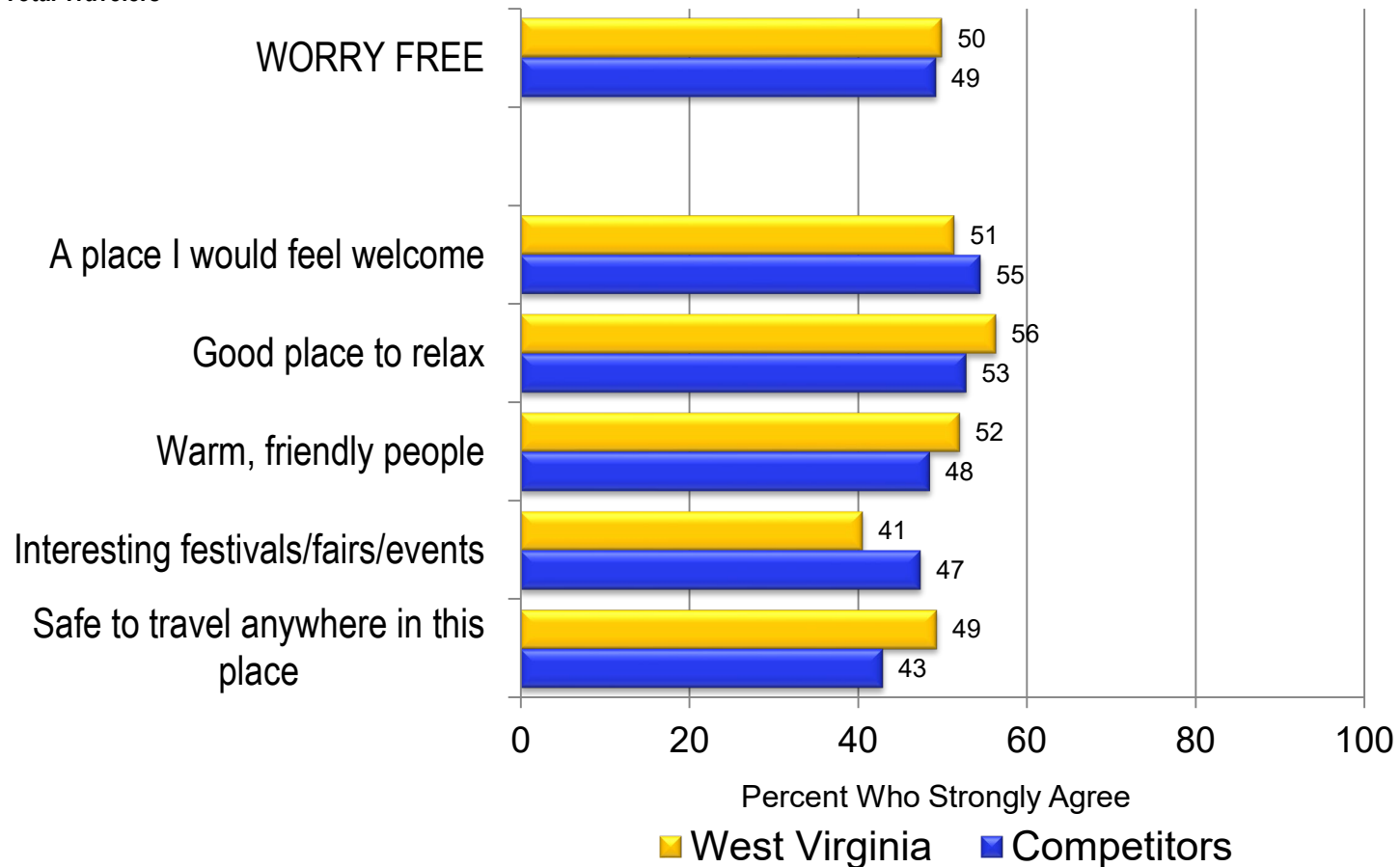
Base: Total Travelers



West Virginia Image vs. Competitors — Worry Free



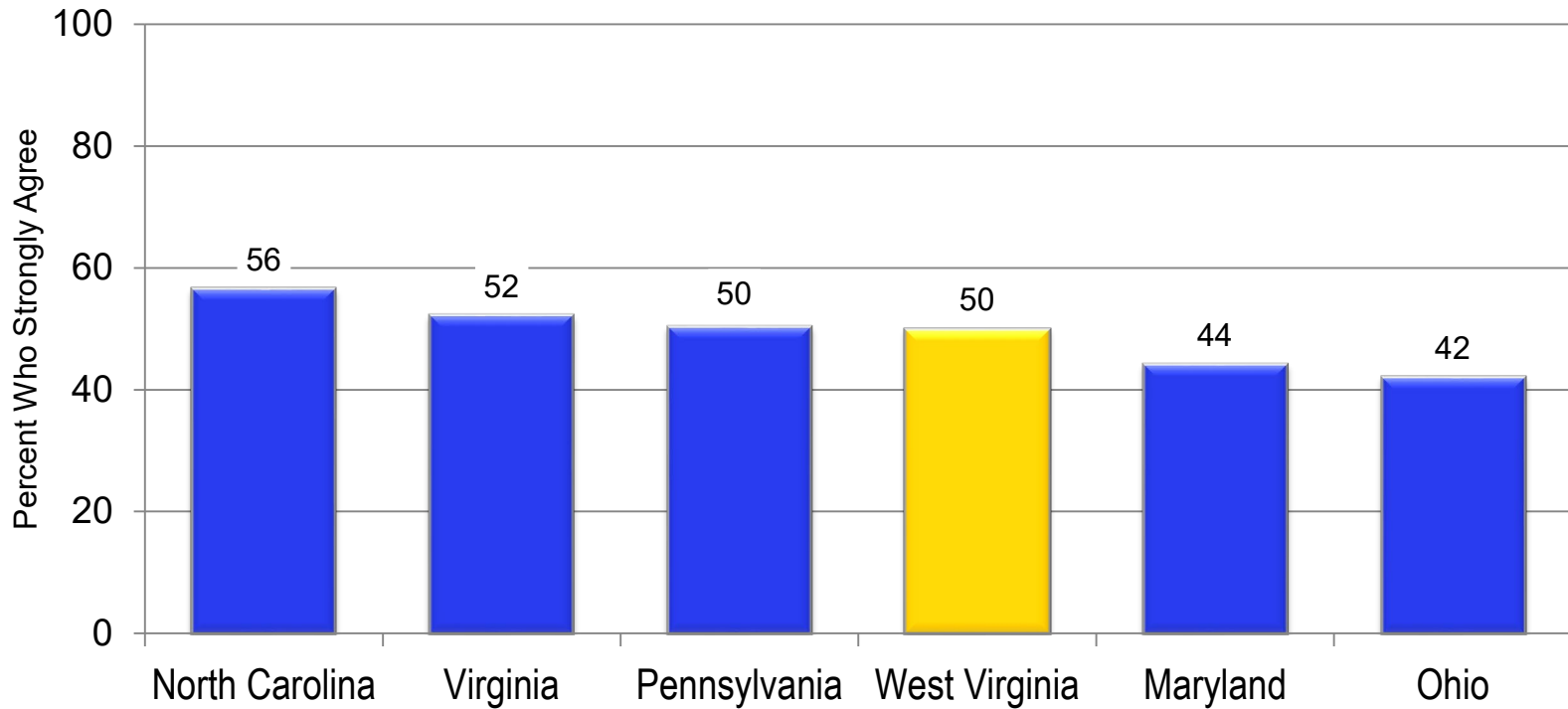
Base: Total Travelers



West Virginia's Image vs. Competitors — Worry Free



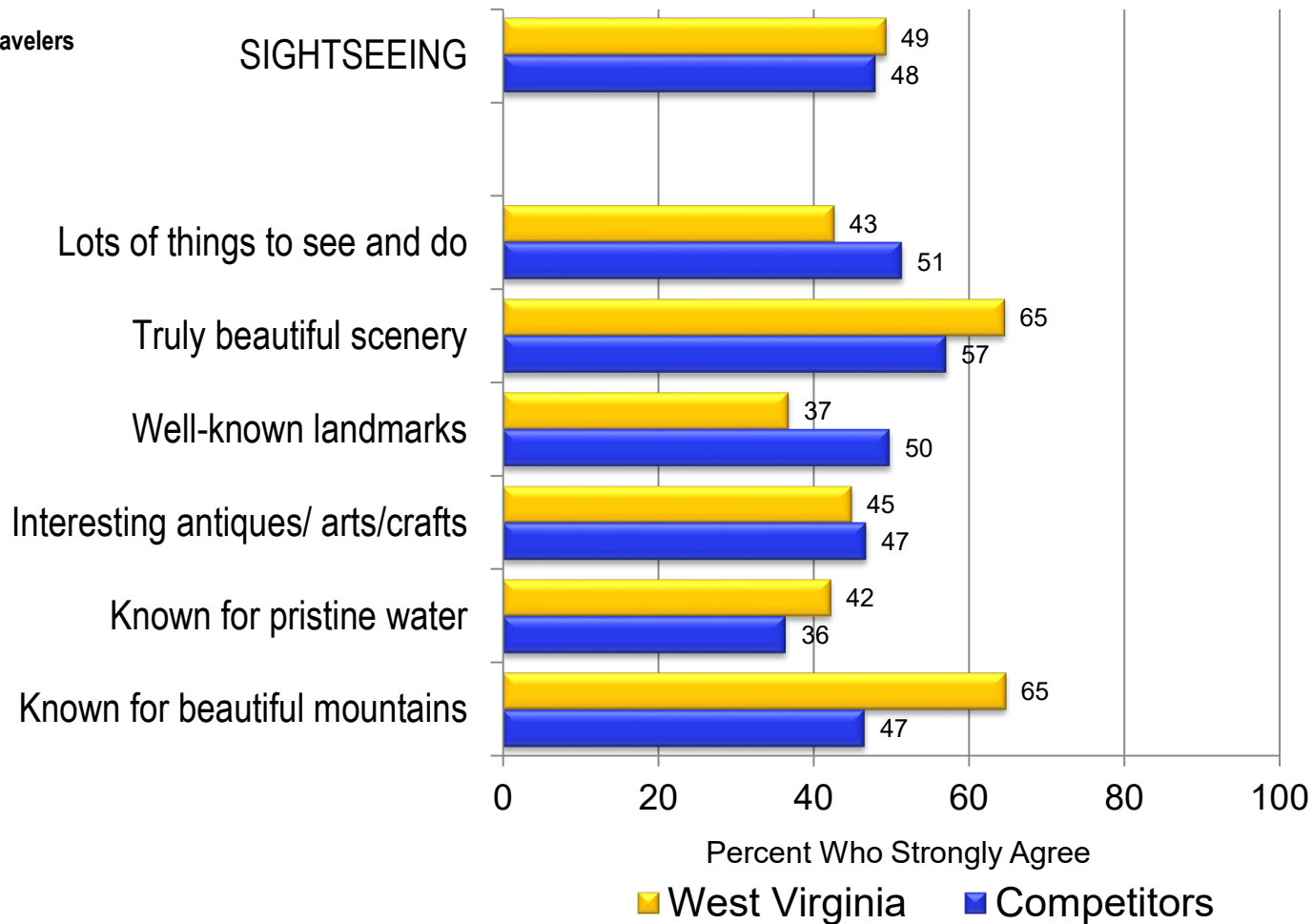
Base: Total Travelers



West Virginia Image vs. Competitors — Sightseeing



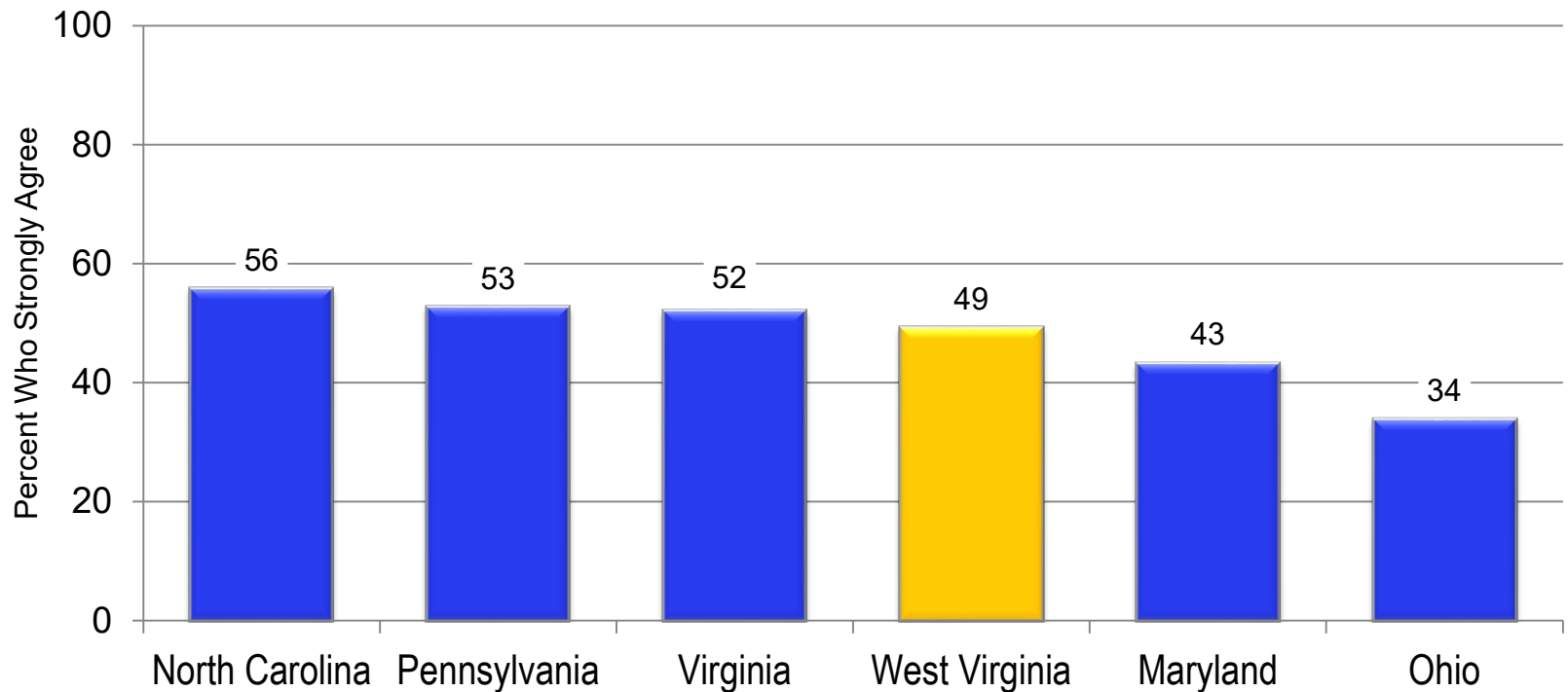
Base: Total Travelers



West Virginia Image vs. Competitors — Sightseeing



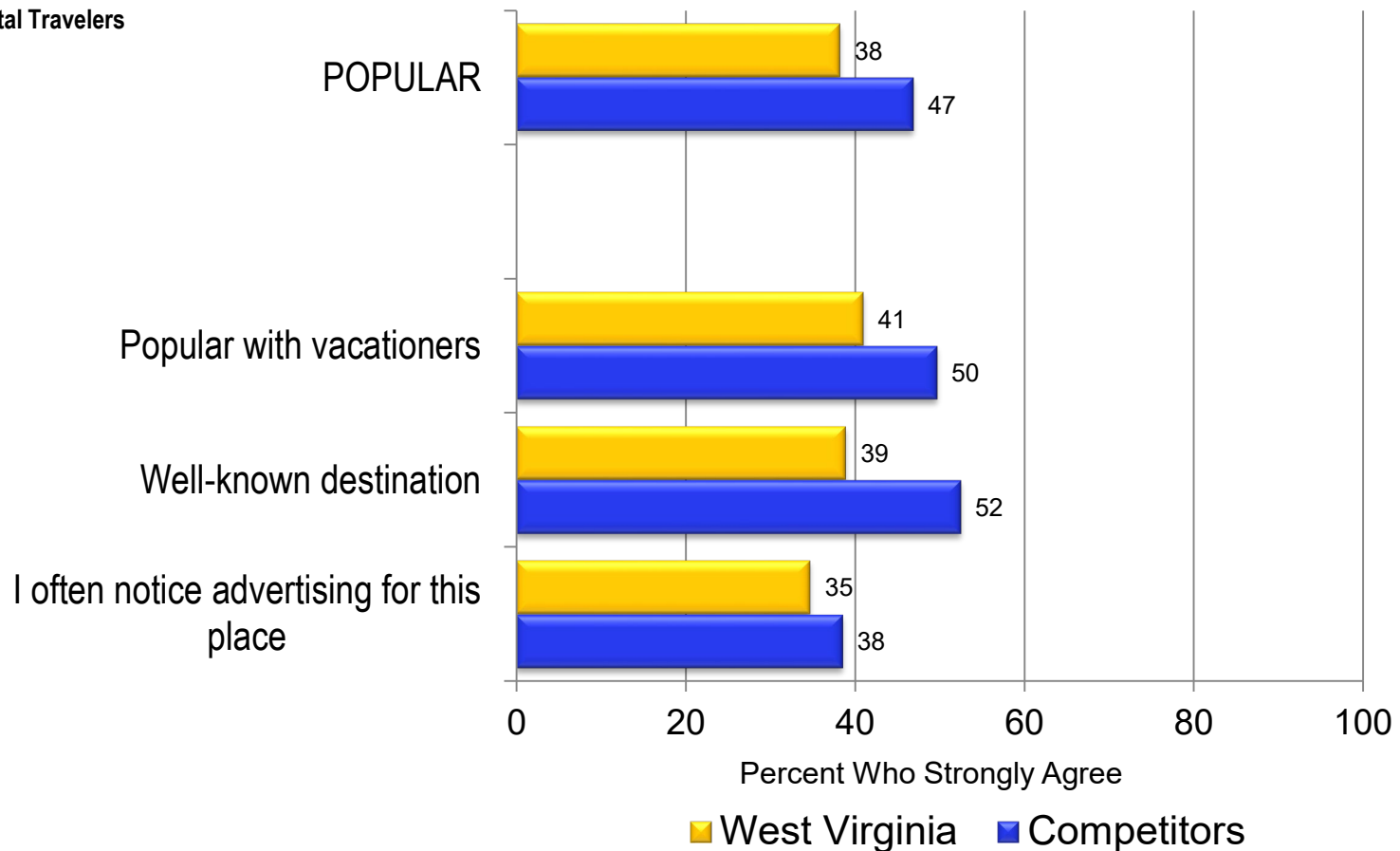
Base: Total Travelers



West Virginia Image vs. Competitors — Popular



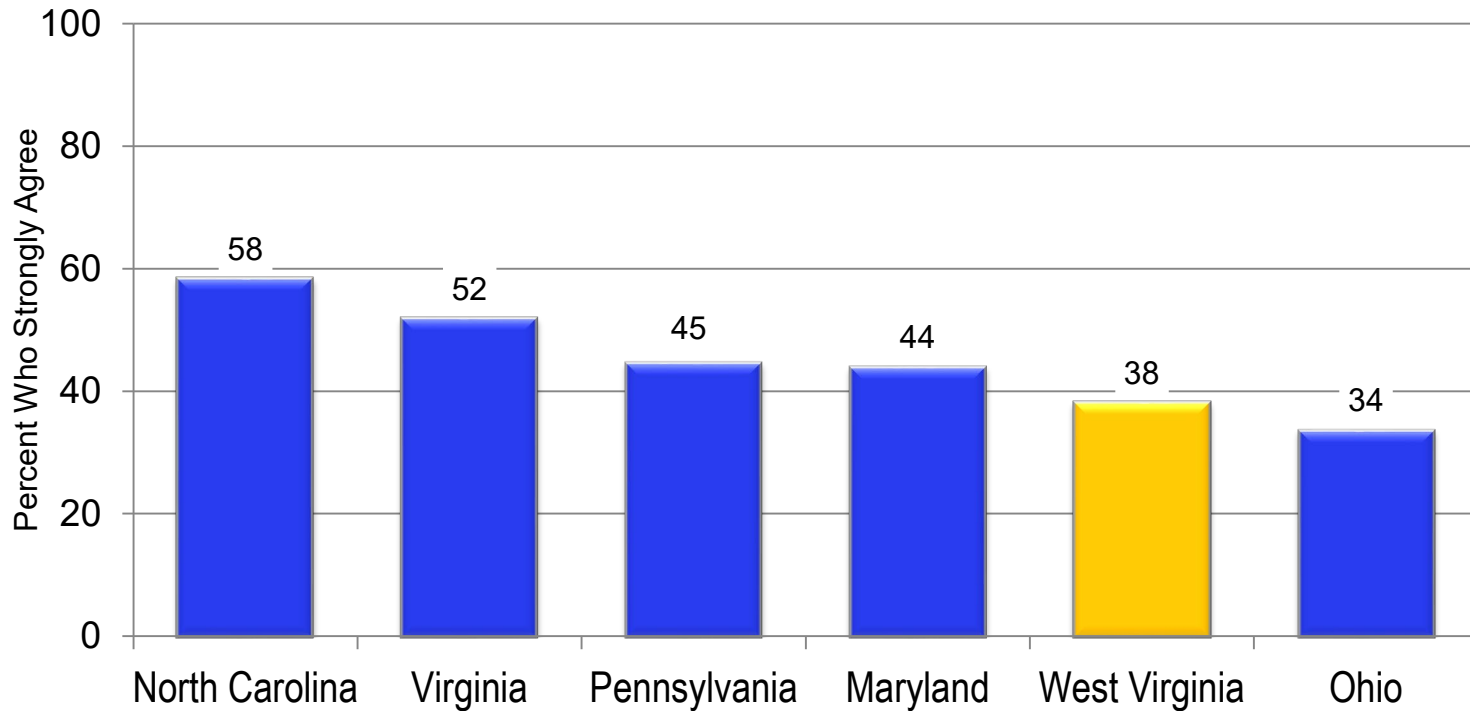
Base: Total Travelers



West Virginia Image vs. Competitors — Popular



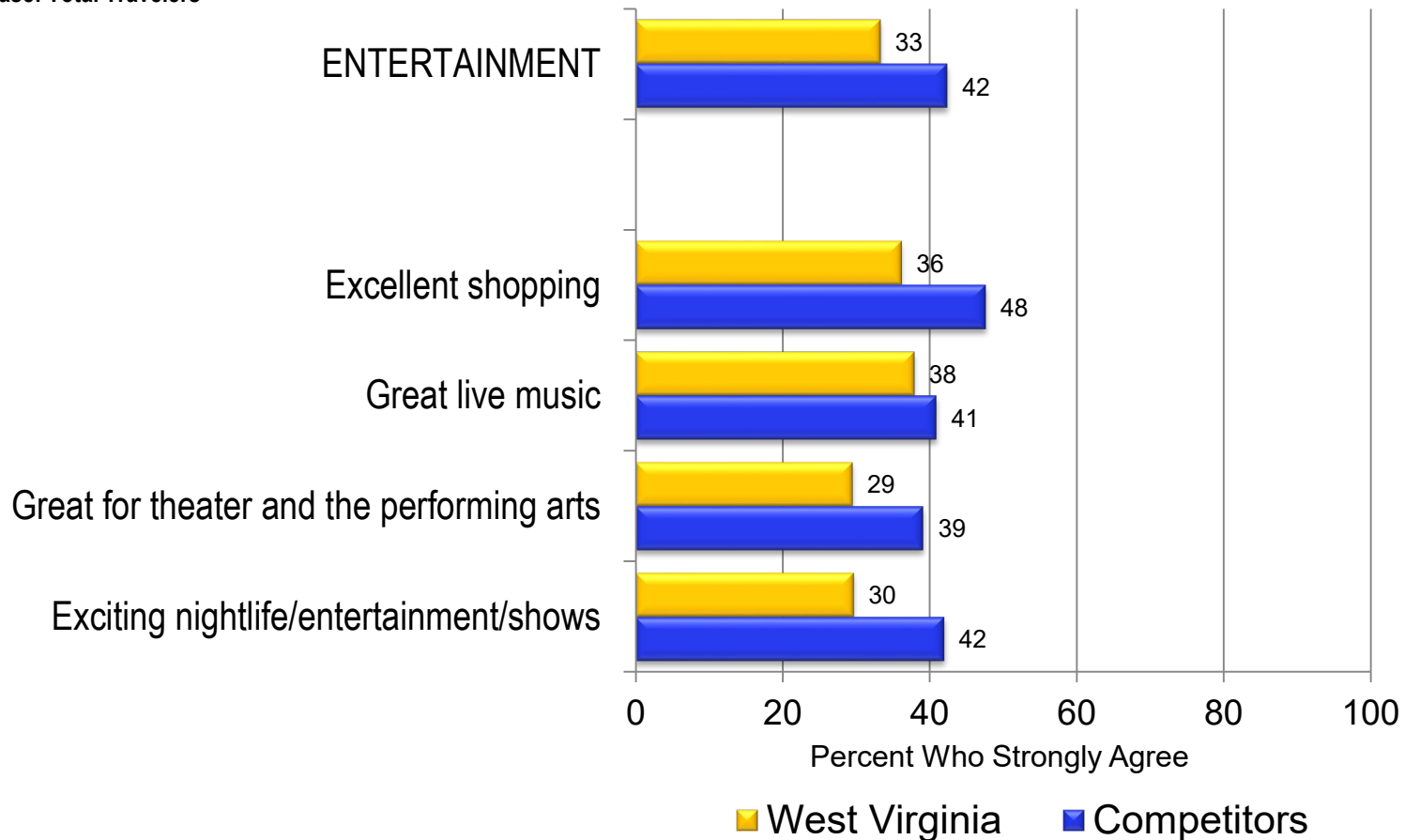
Base: Total Travelers



West Virginia Image vs. Competitors — Entertainment



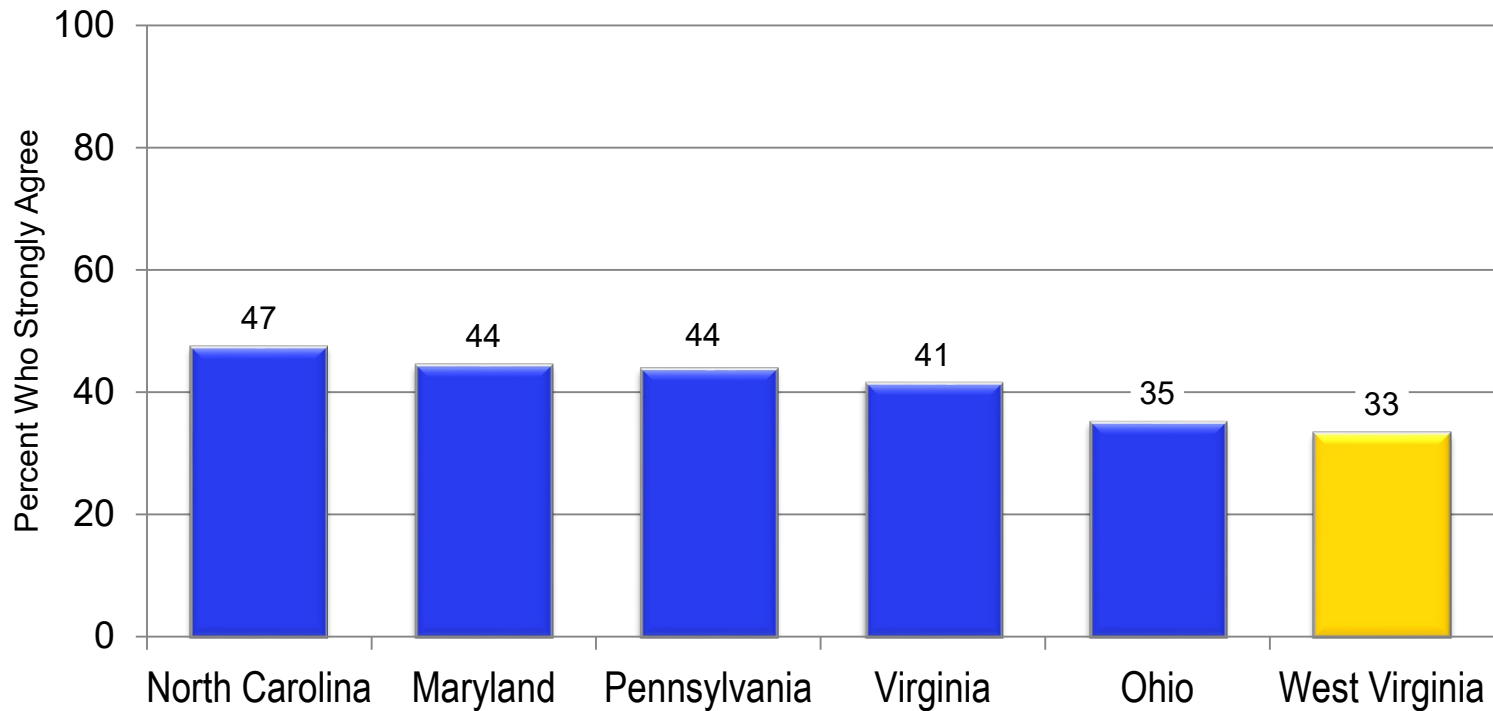
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West Virginia Image vs. Competitors — Entertainment



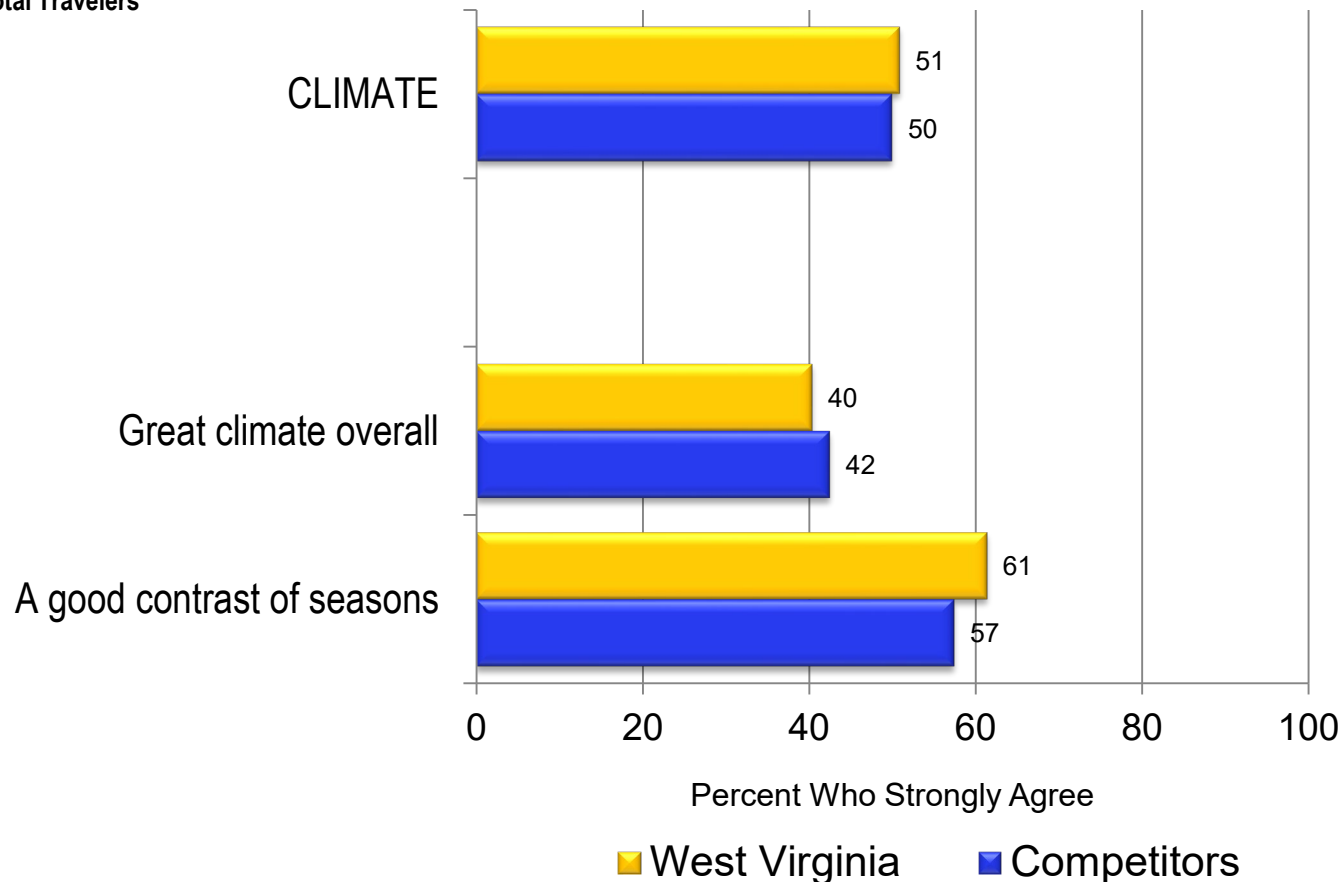
Base: Total Travelers



West Virginia Image vs. Competitors — Climate



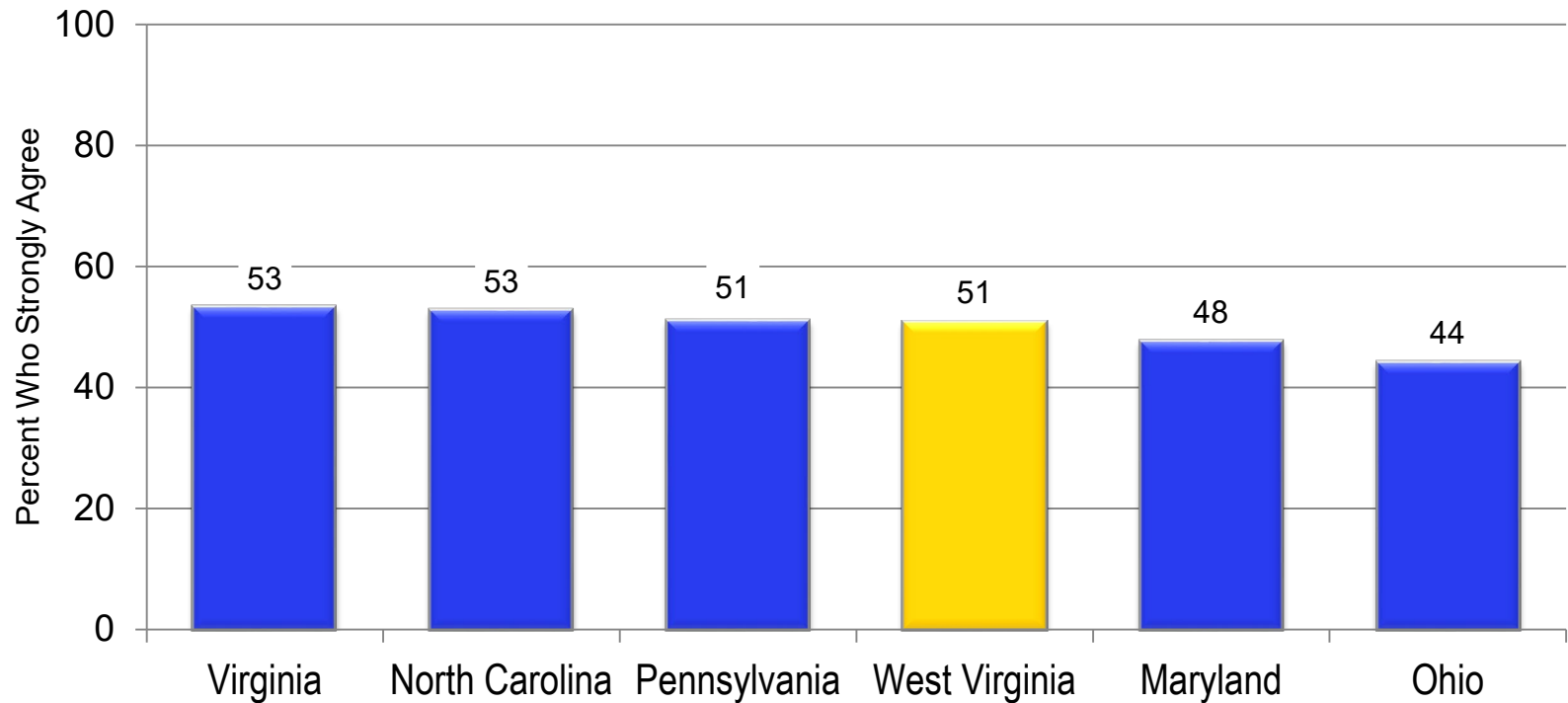
Base: Total Travelers



West Virginia Image vs. Competitors — Climate



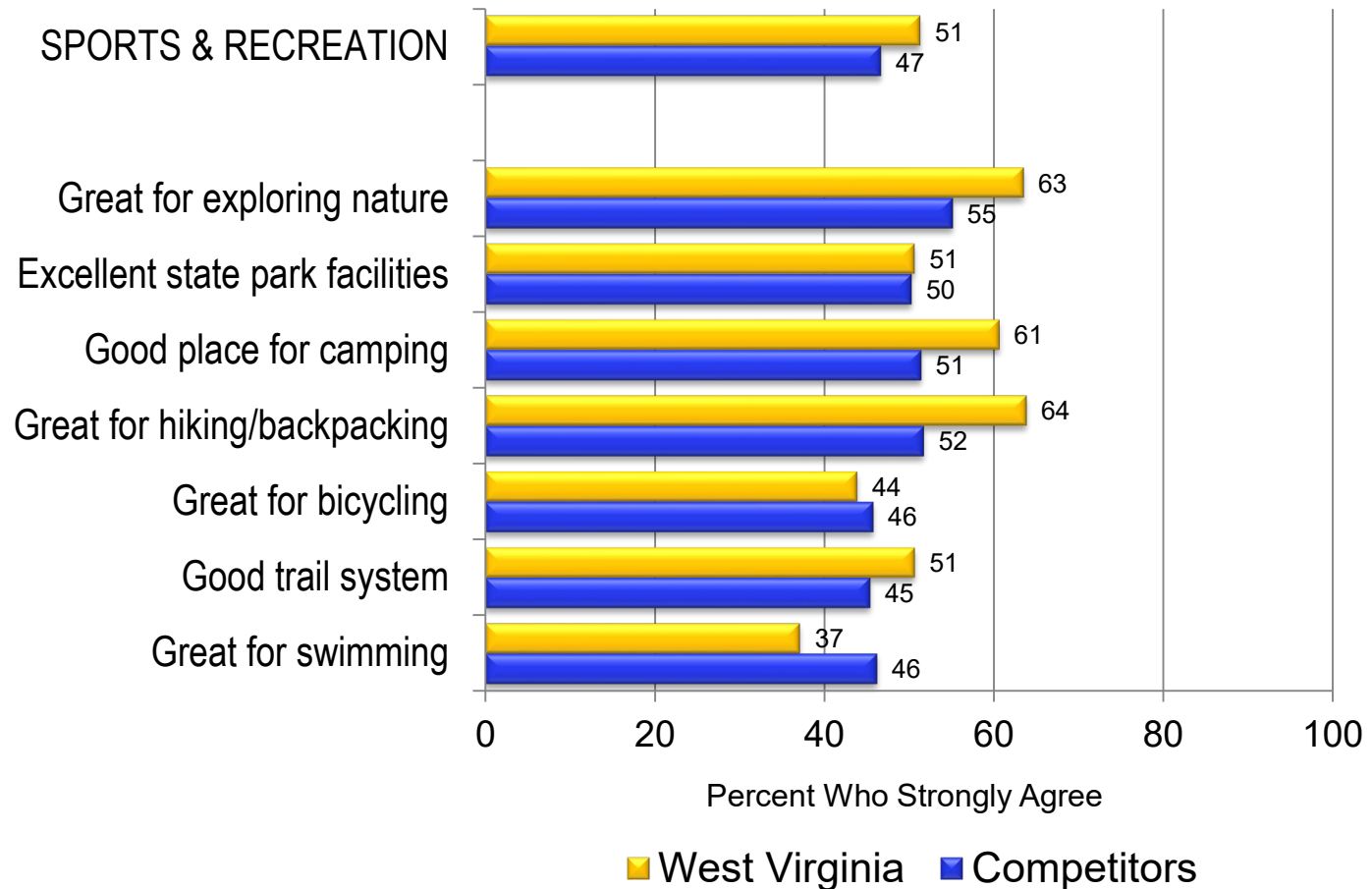
Base: Total Travelers



West Virginia Image vs. Competitors — Sports and Recreation



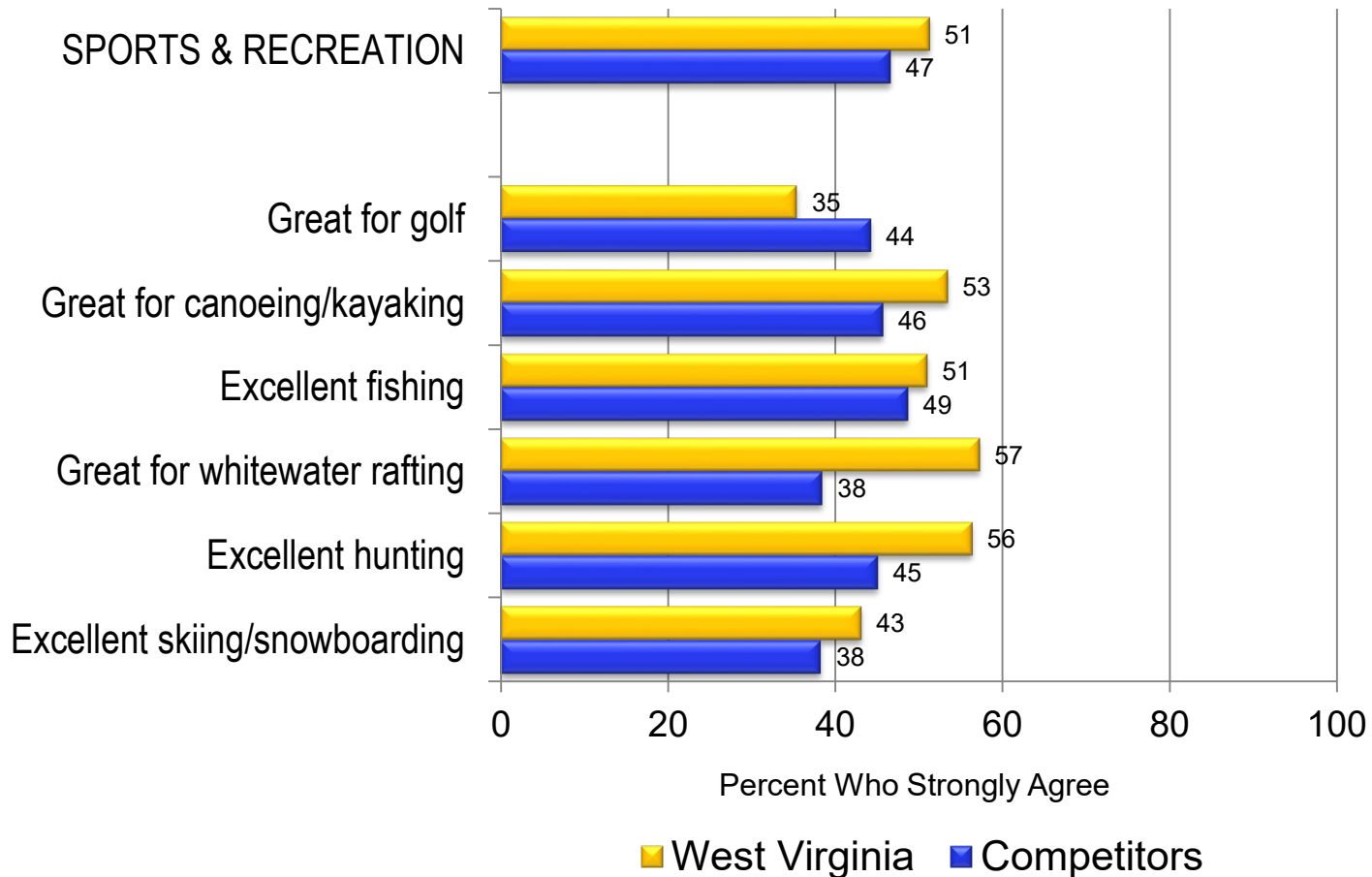
Base: Total Travelers



West Virginia Image vs. Competitors — Sports and Recreation (Cont'd)



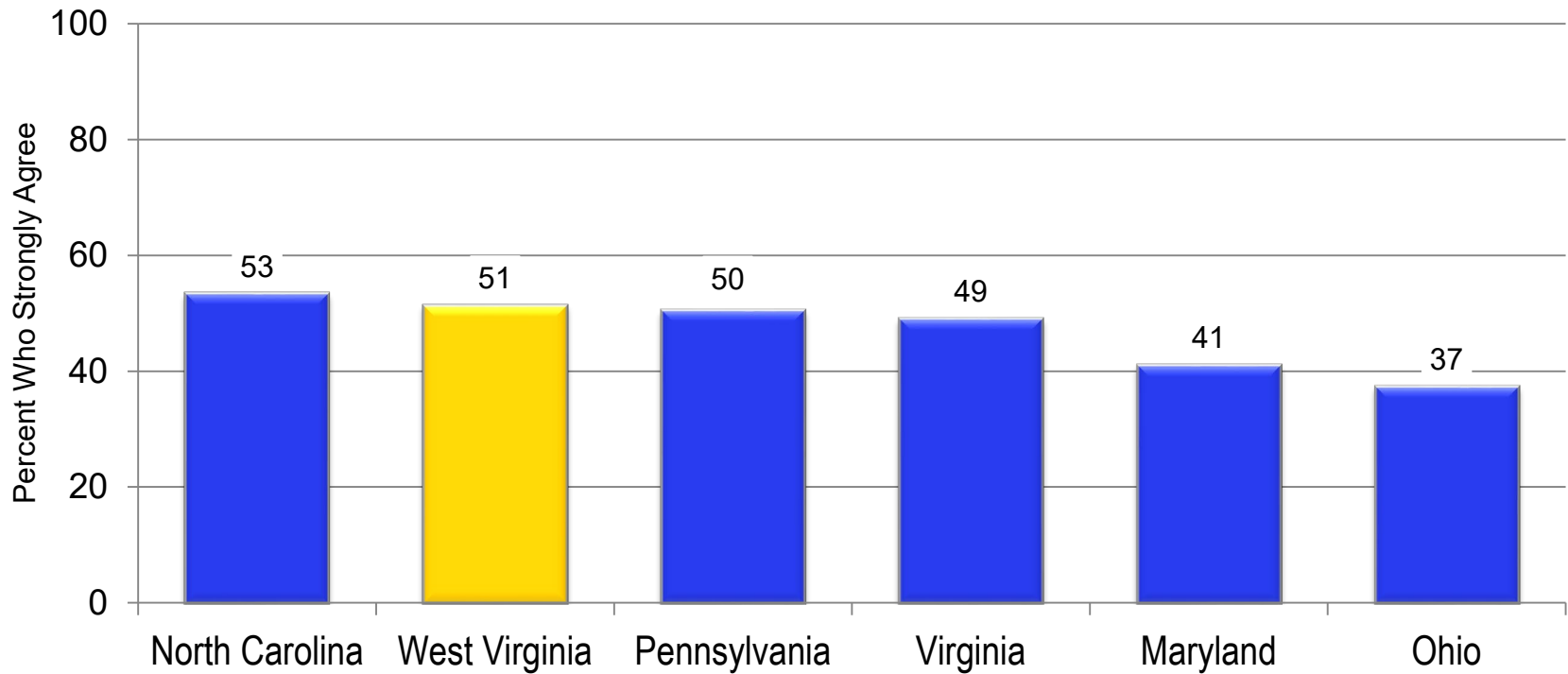
Base: Total Travelers



West Virginia Image vs. Competitors — Sports and Recreation



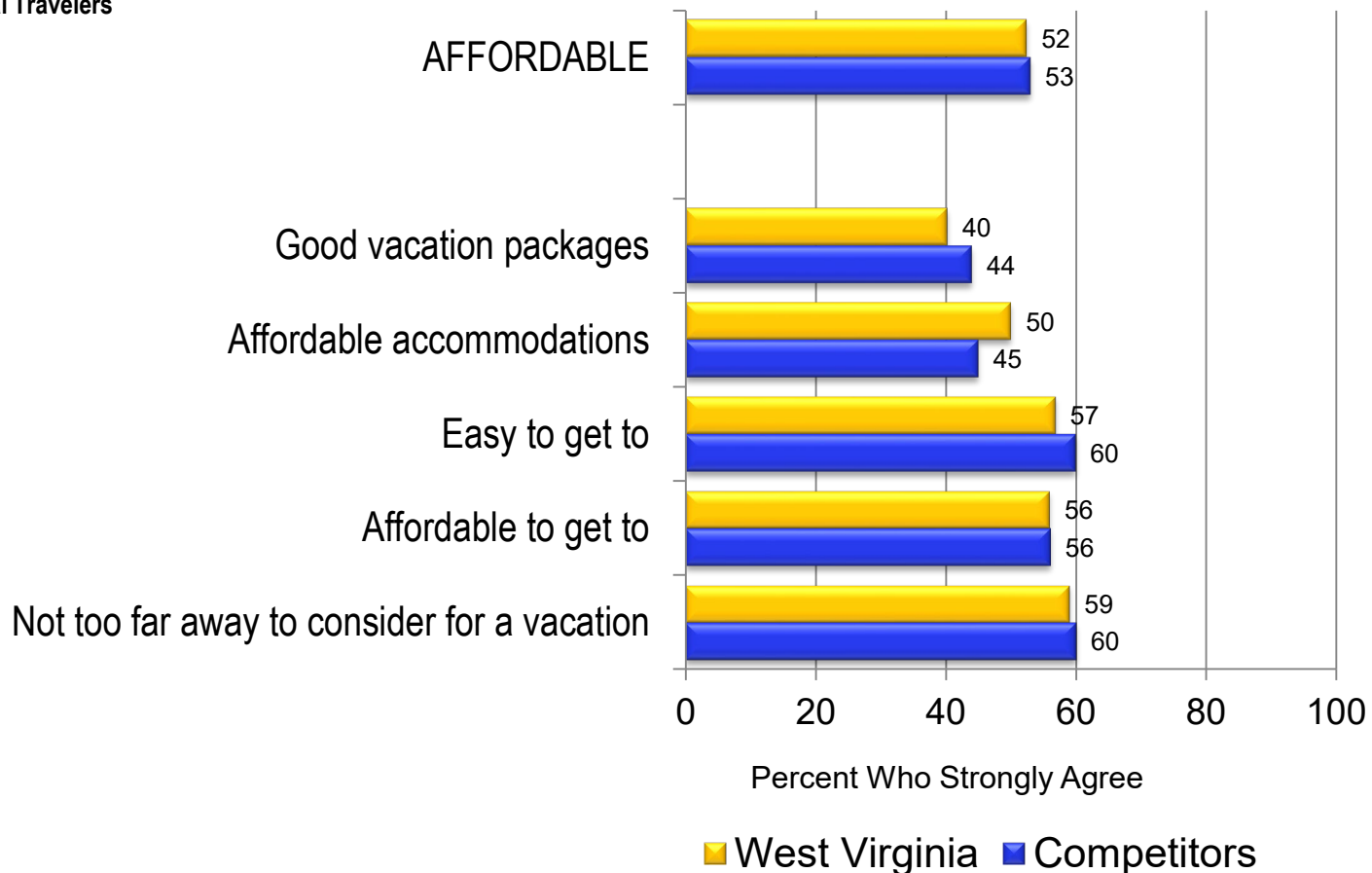
Base: Total Travelers



West Virginia Image vs. Competitors — Affordable



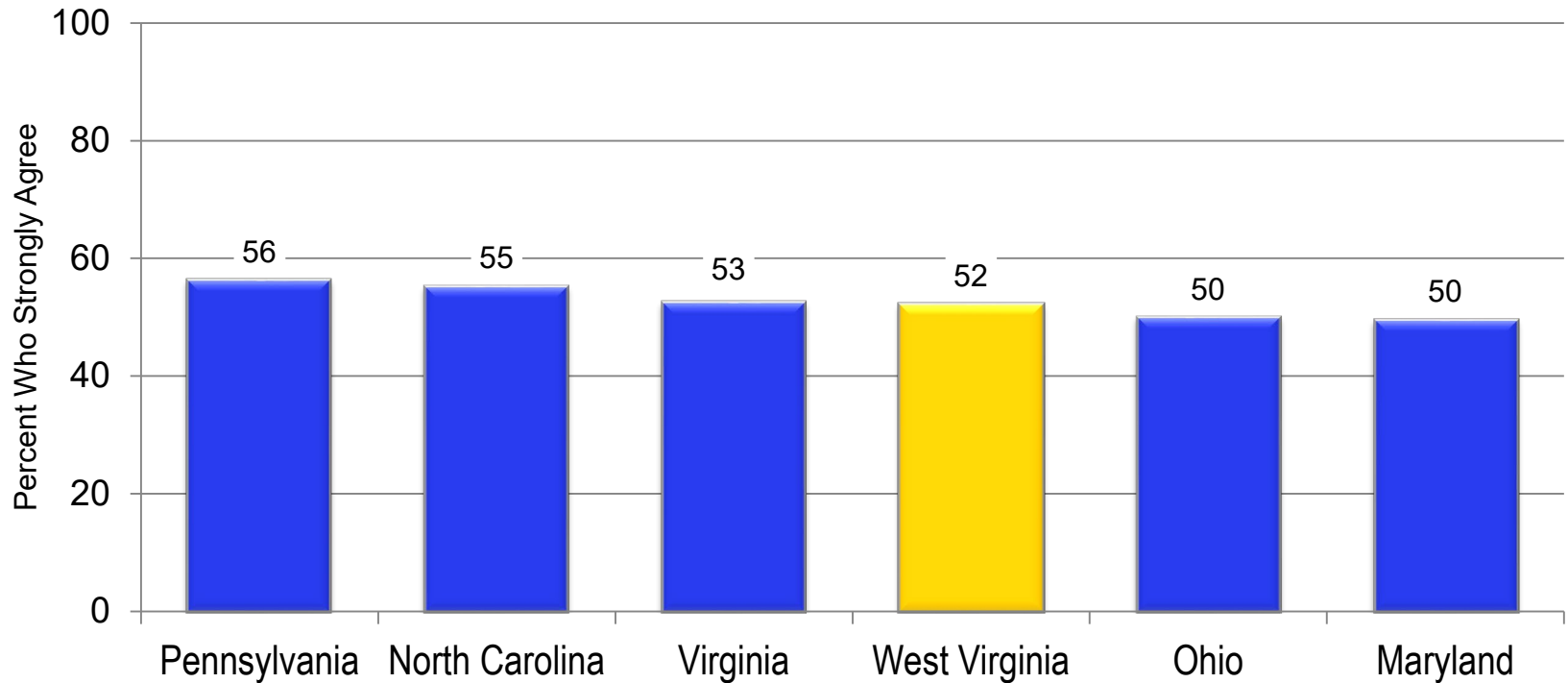
Base: Total Travelers



West Virginia Image vs. Competitors — Affordable



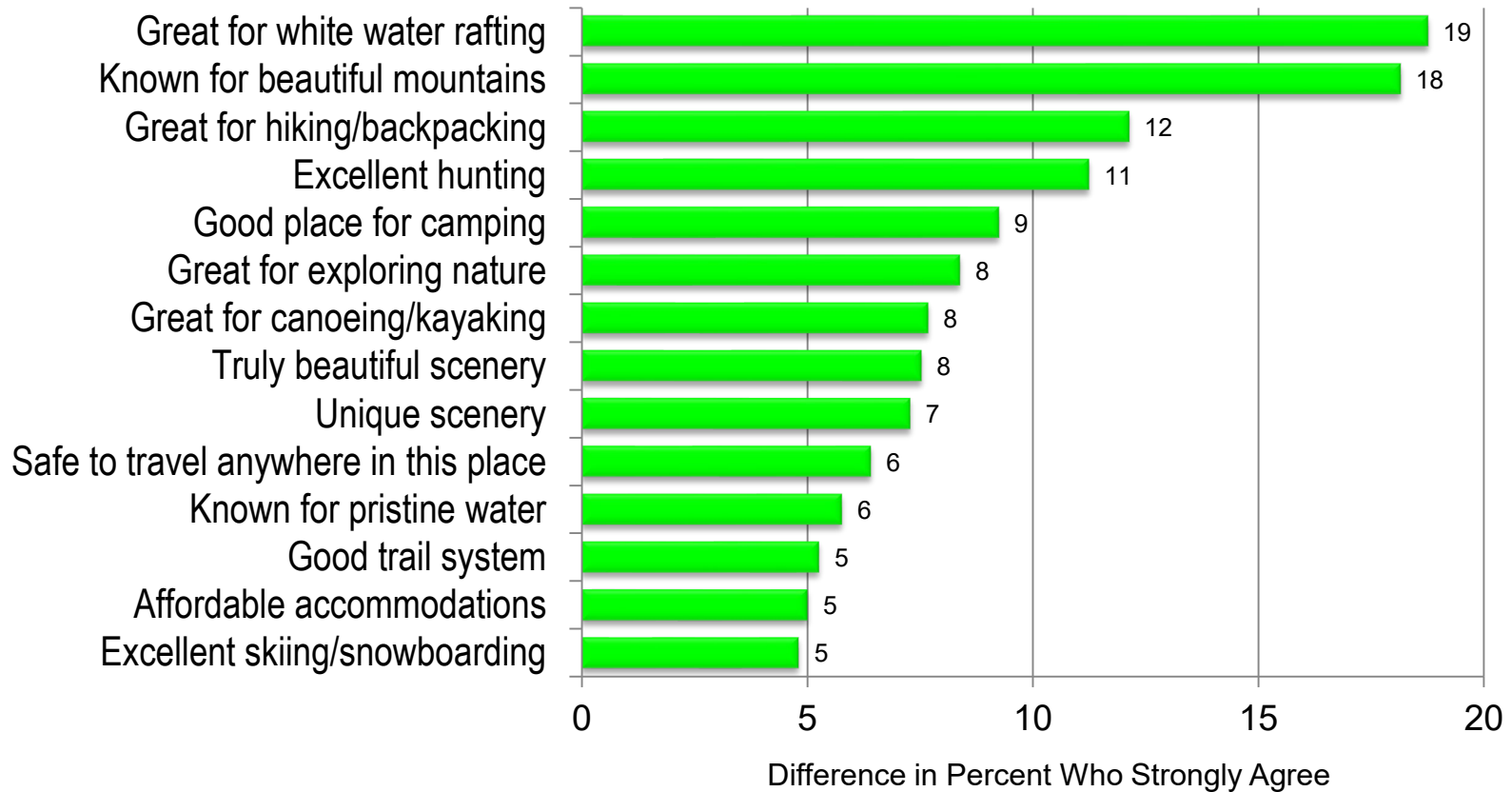
Base: Total Travelers



West Virginia Image Strengths vs. Competitors



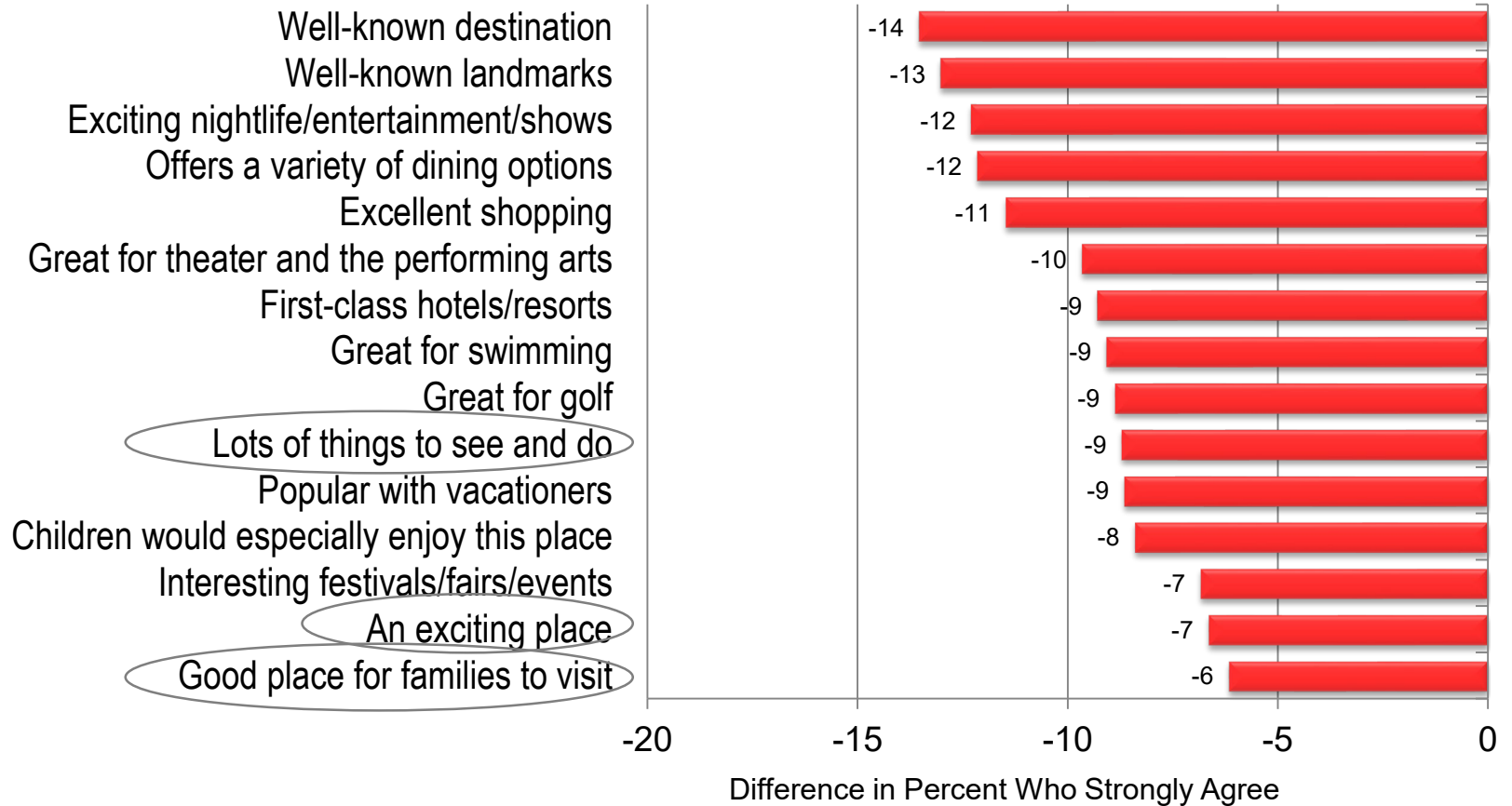
Base: Total Travelers



West Virginia Image Weaknesses vs. Competitors



Base: Total Travelers

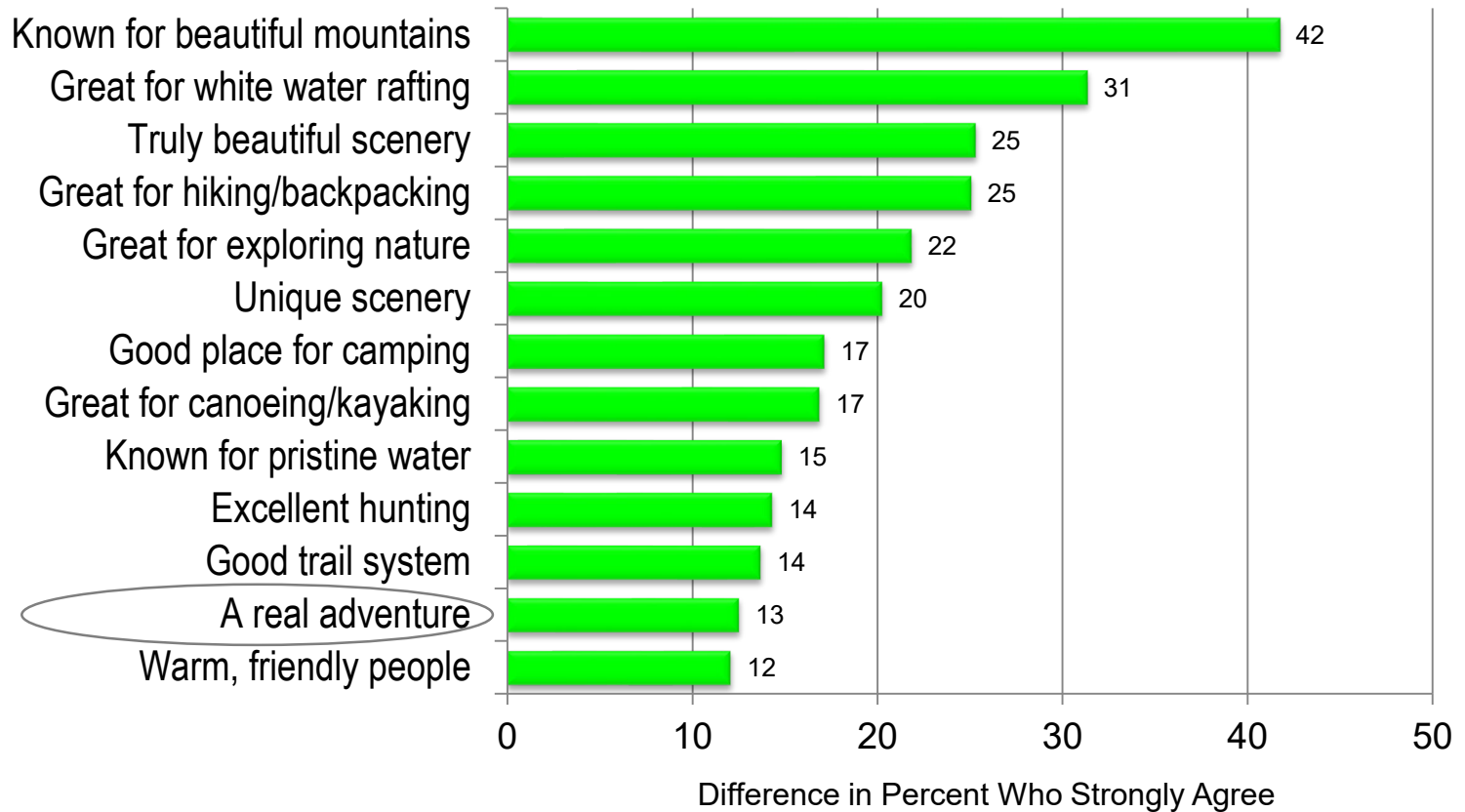


*Circled attributes are some of the most important image hot buttons for travelers

West Virginia Image Strengths vs. Ohio



Base: Total Travelers

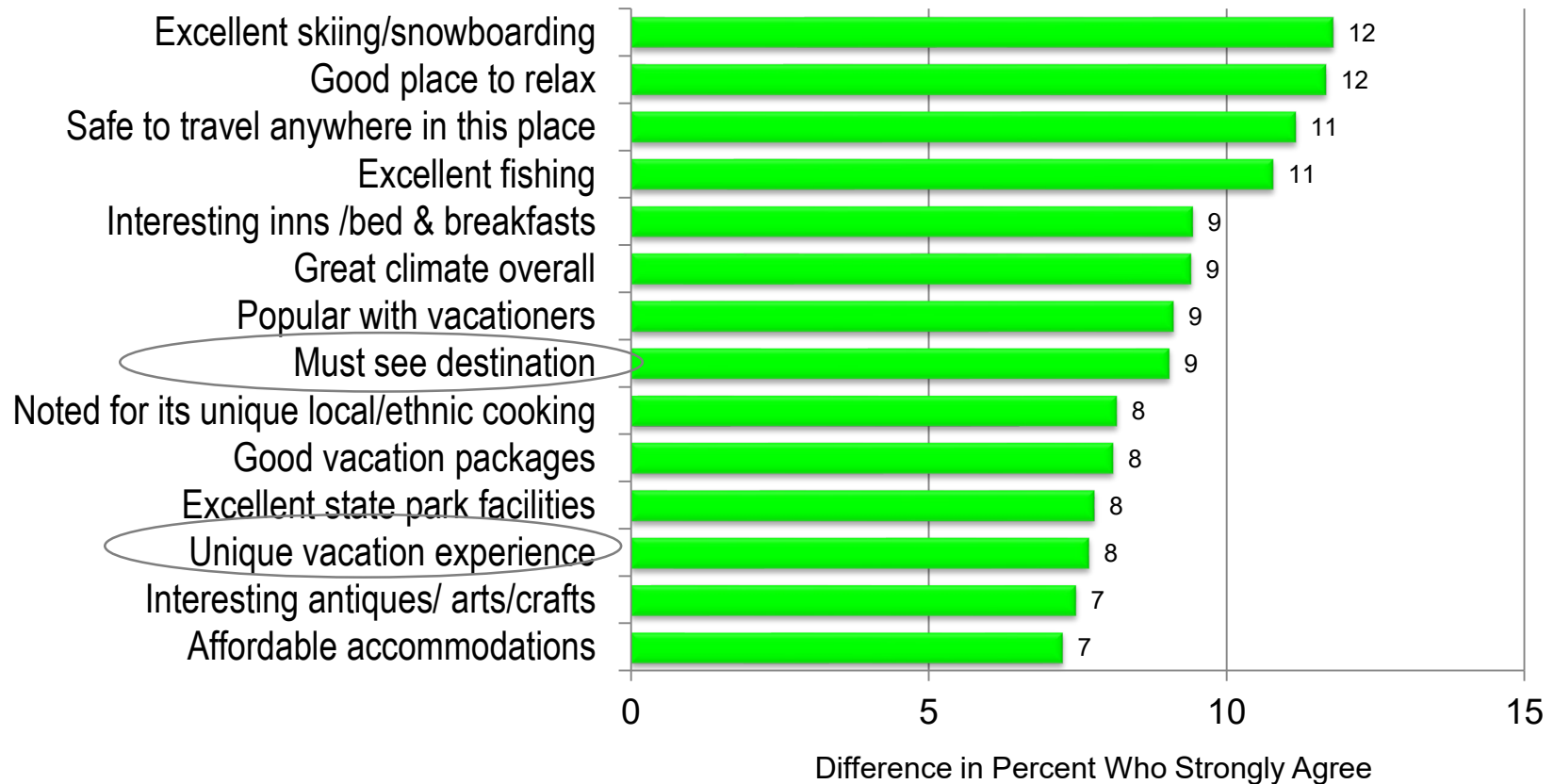


*Circled attributes are some of the most important image hot buttons for travelers

West Virginia Image Strengths vs. Ohio (Cont'd)



Base: Total Travelers

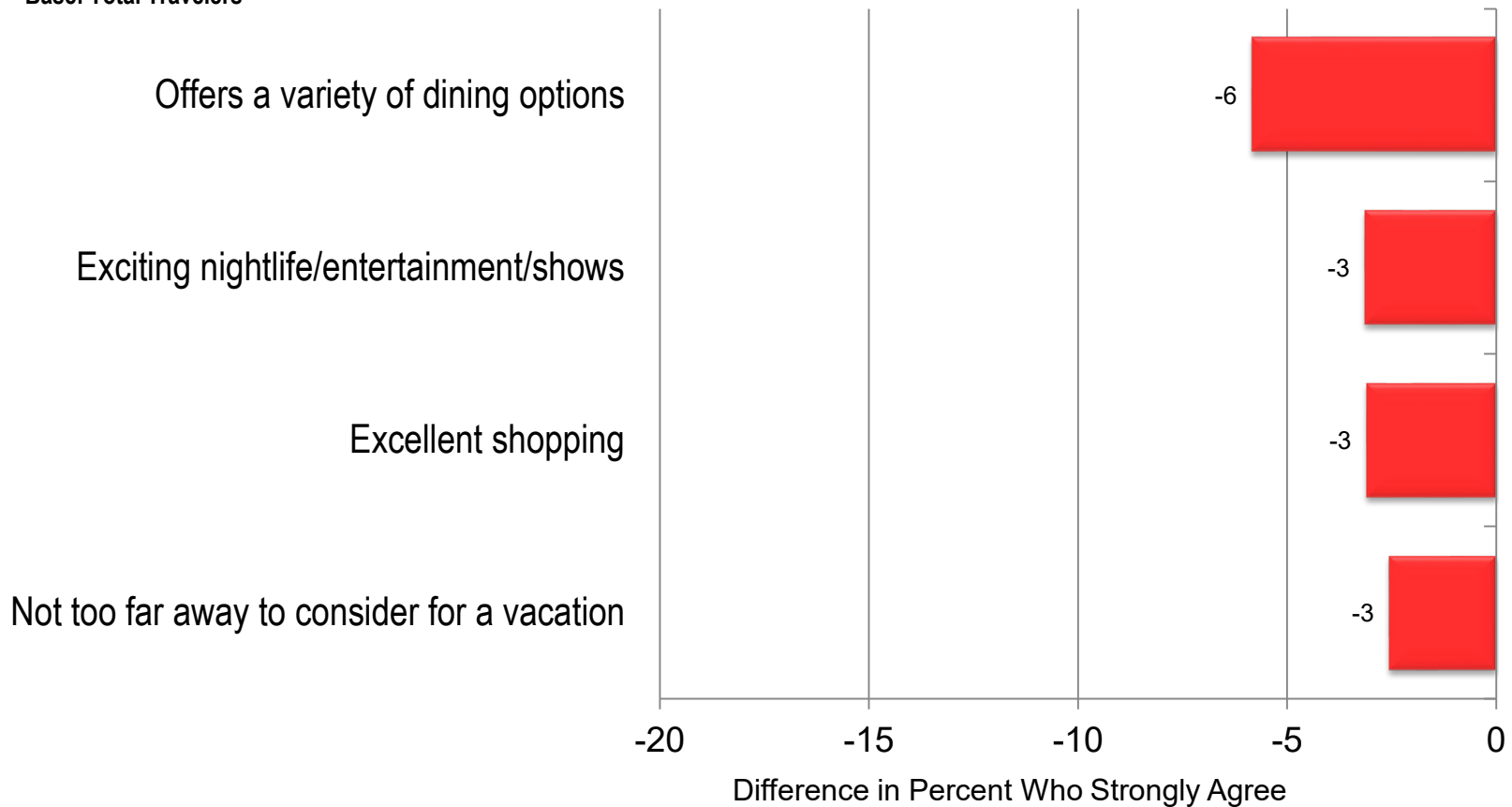


*Circled attributes are some of the most important image hot buttons for travelers

West Virginia Image Weaknesses vs. Ohio



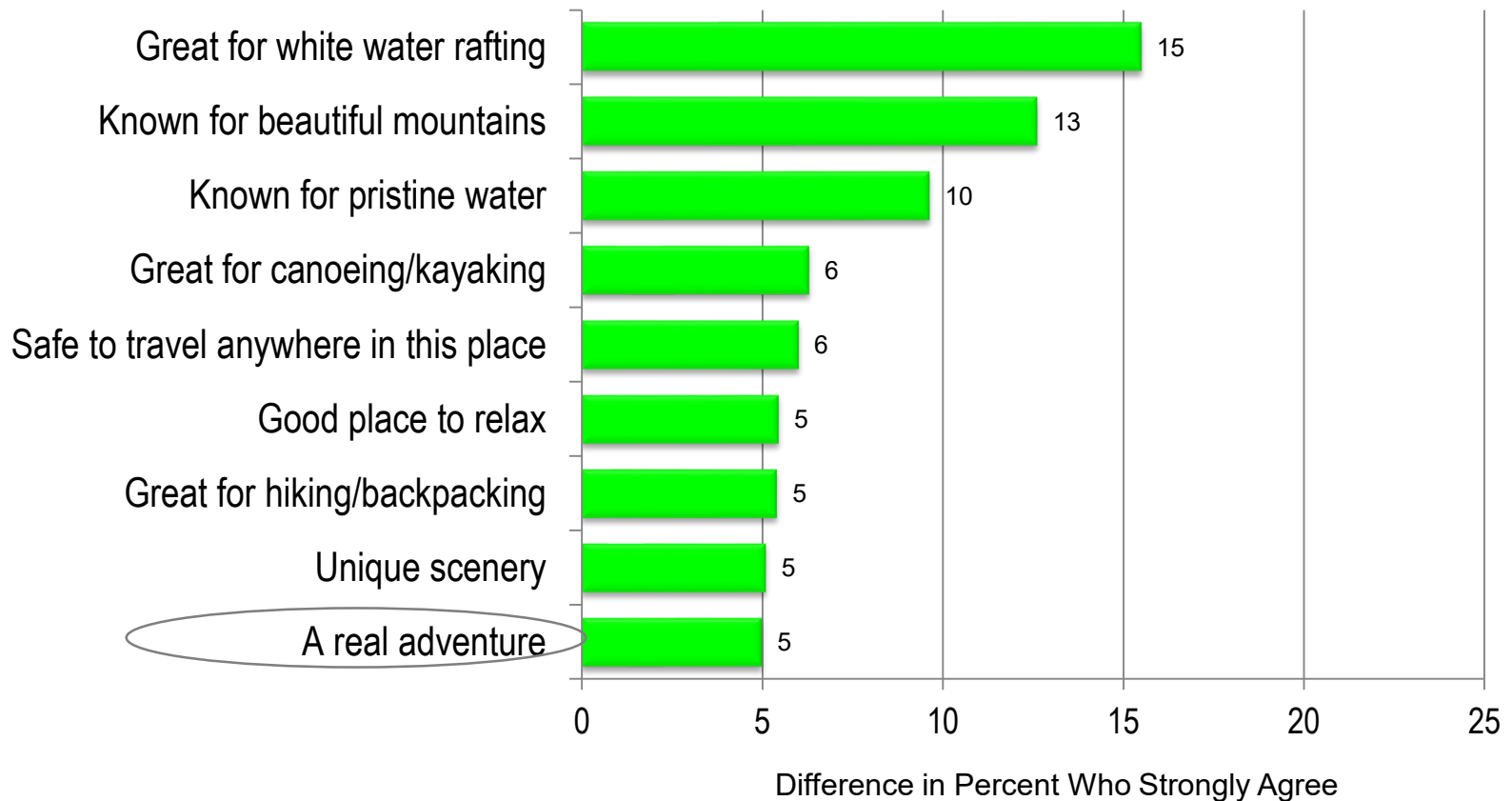
Base: Total Travelers



West Virginia Image Strengths vs. Pennsylvania



Base: Total Travelers

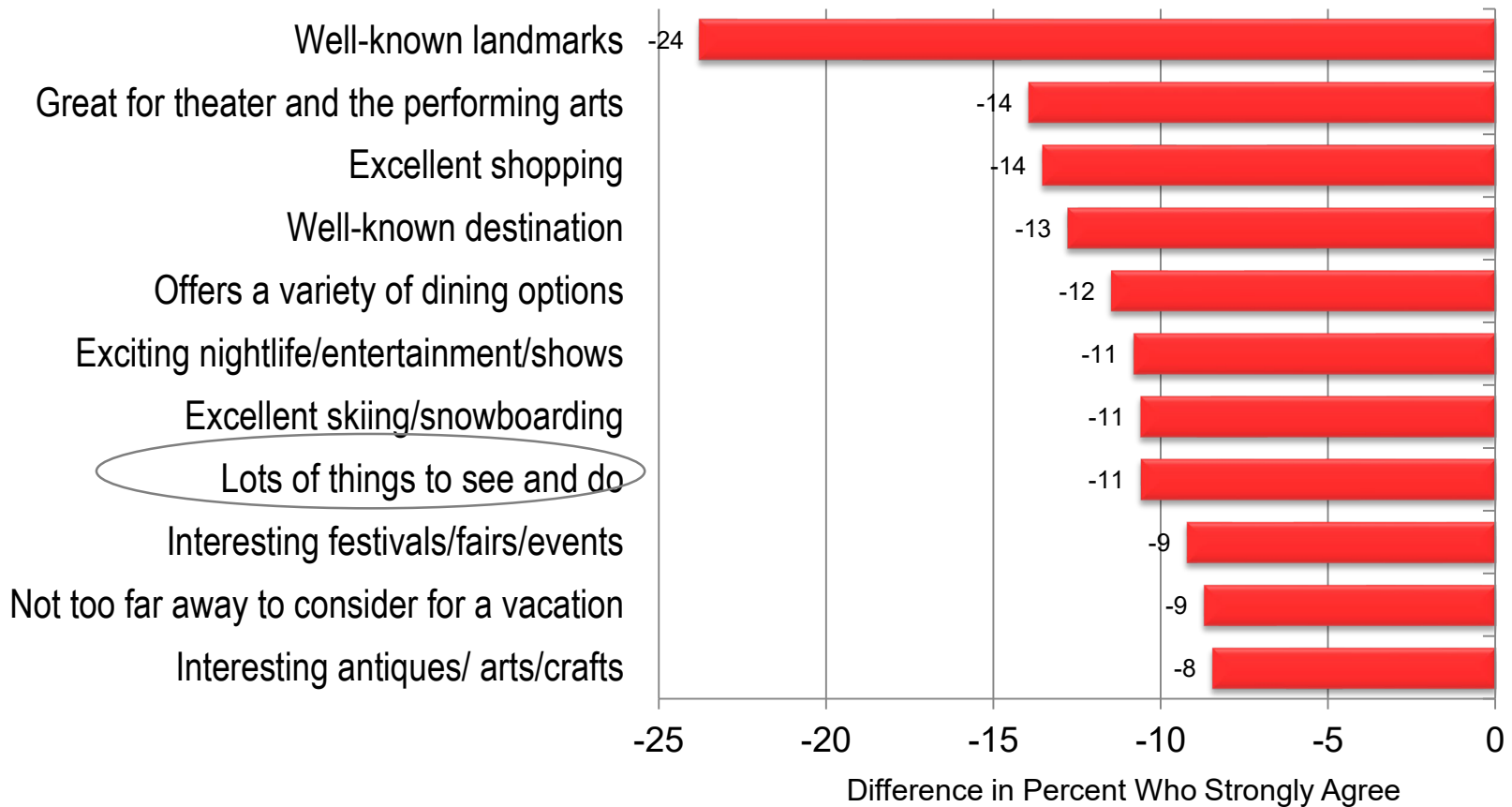


*Circled attributes are some of the most important image hot buttons for travelers

West Virginia Image Weaknesses vs. Pennsylvania



Base: Total Travelers

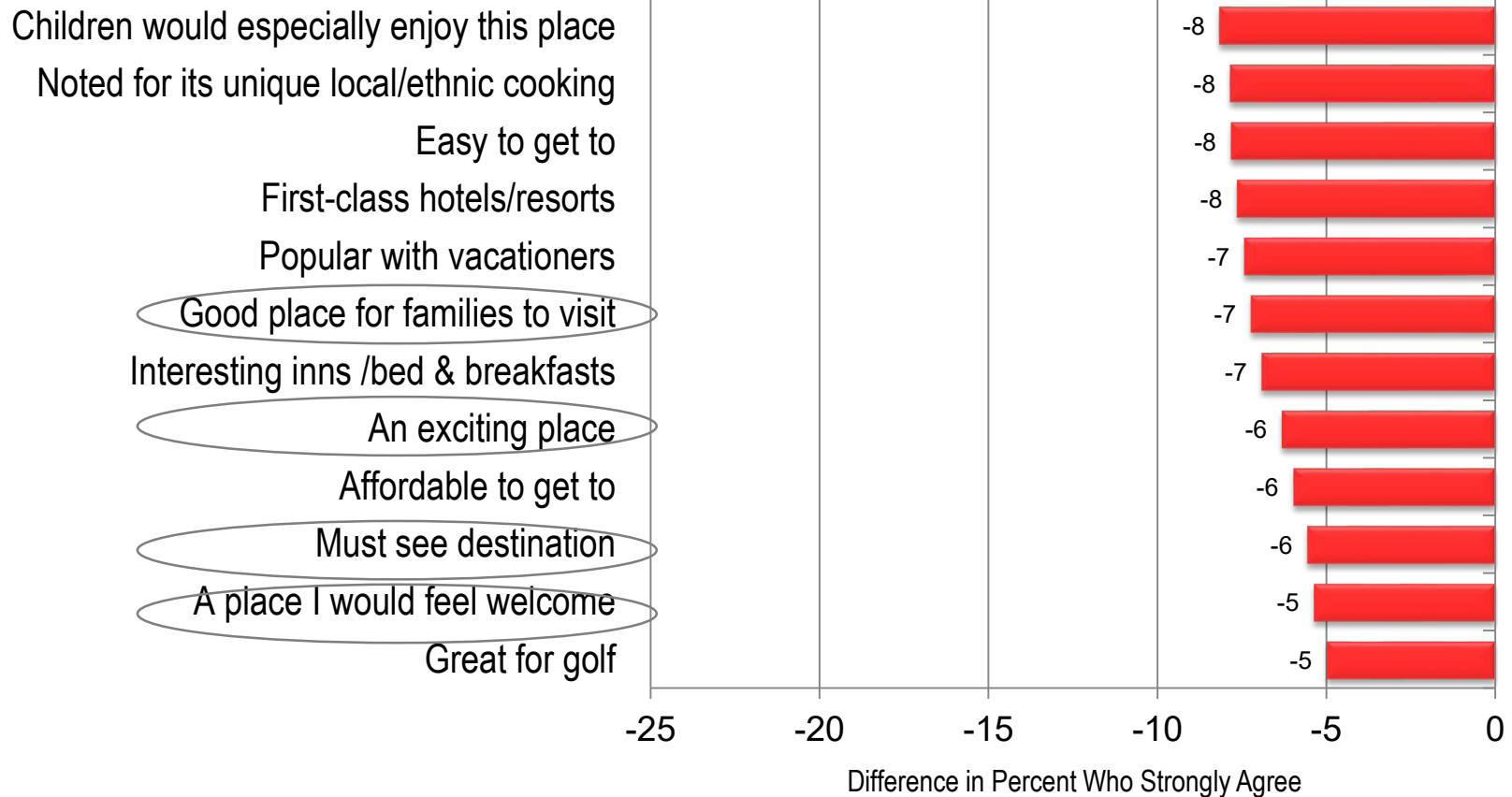


*Circled attributes are some of the most important image hot buttons for travelers

West Virginia Image Weaknesses vs. Pennsylvania (Cont'd)



Base: Total Travelers

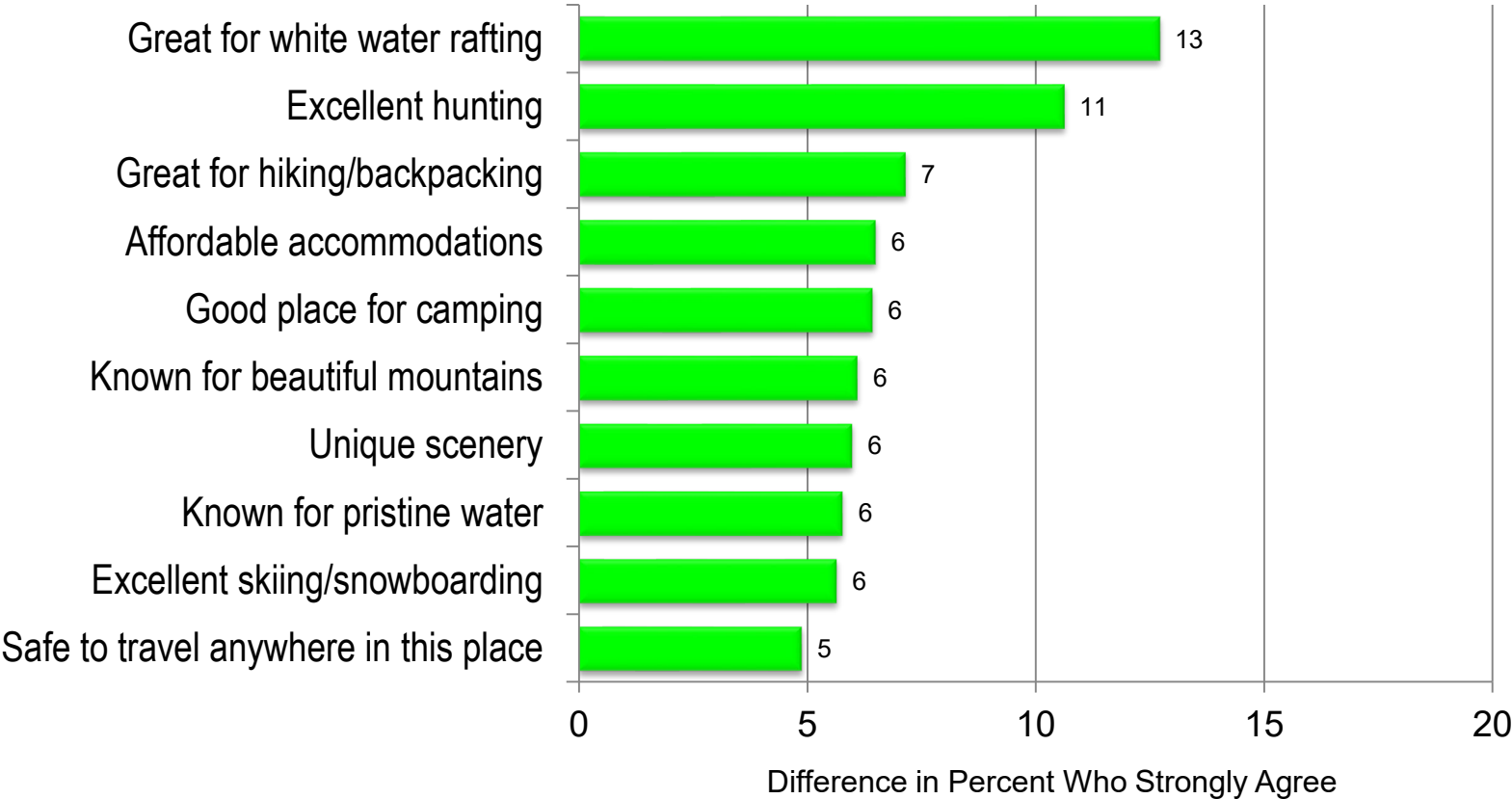


*Circled attributes are some of the most important image hot buttons for travelers

West Virginia Image Strengths vs. Virginia



Base: Total Travelers



West Virginia Image Weaknesses vs. Virginia



Base: Total Travelers

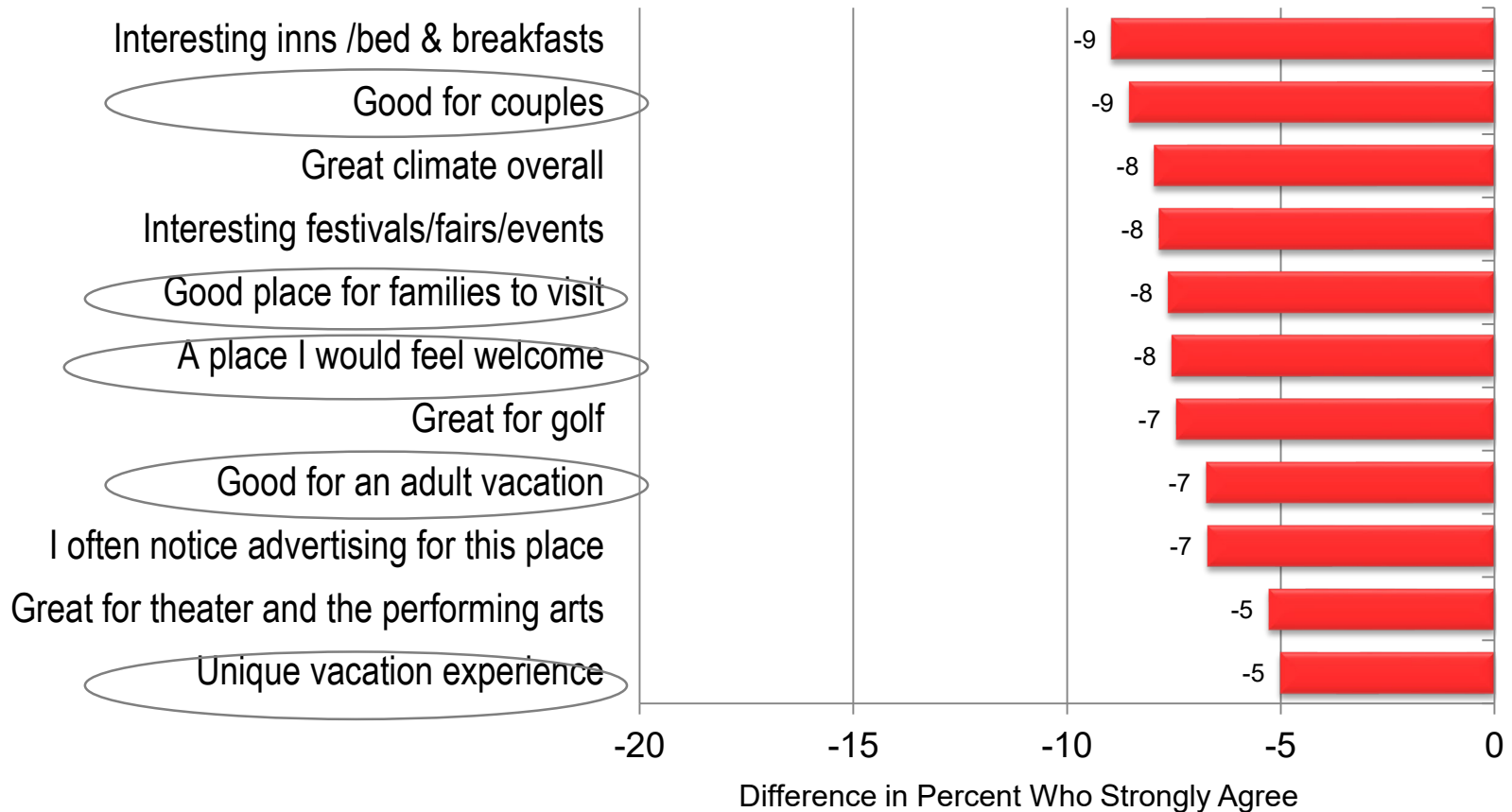


*Circled attributes are some of the most important image hot buttons for travelers

West Virginia Image Weaknesses vs. Virginia



Base: Total Travelers

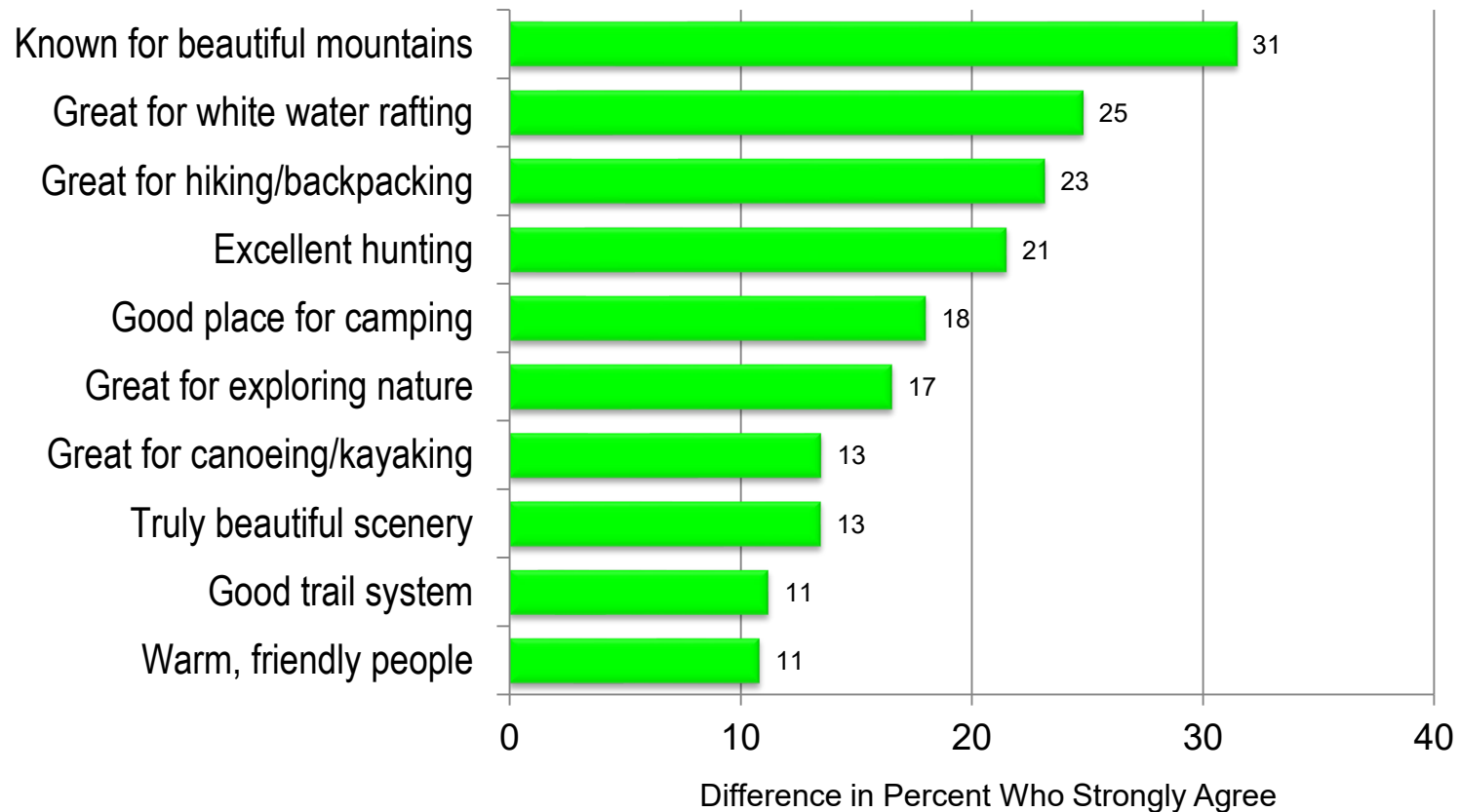


*Circled attributes are some of the most important image hot buttons for travelers

West Virginia Image Strengths vs. Maryland



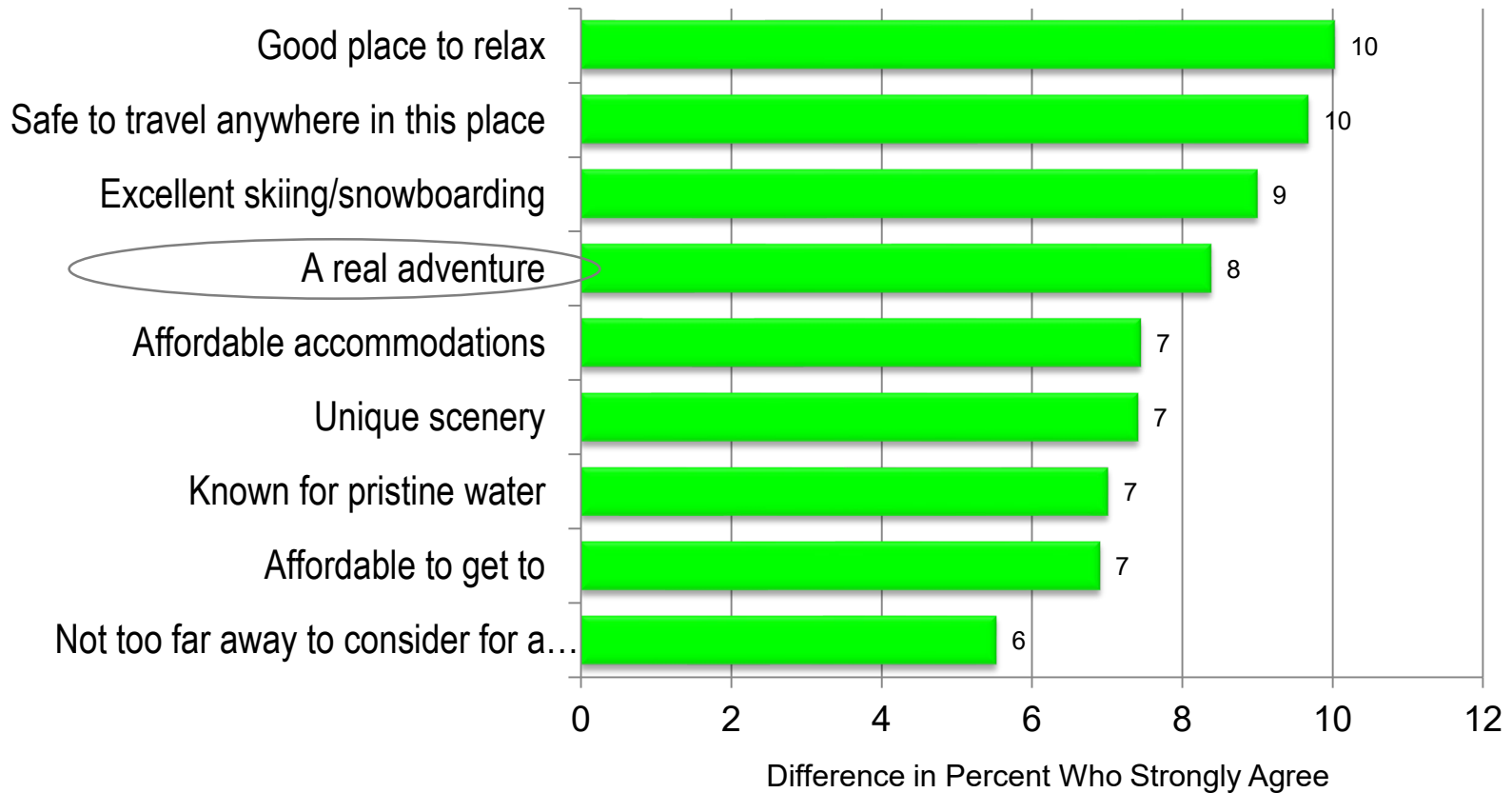
Base: Total Travelers



West Virginia Image Strengths vs. Maryland (Cont'd)



Base: Total Travelers



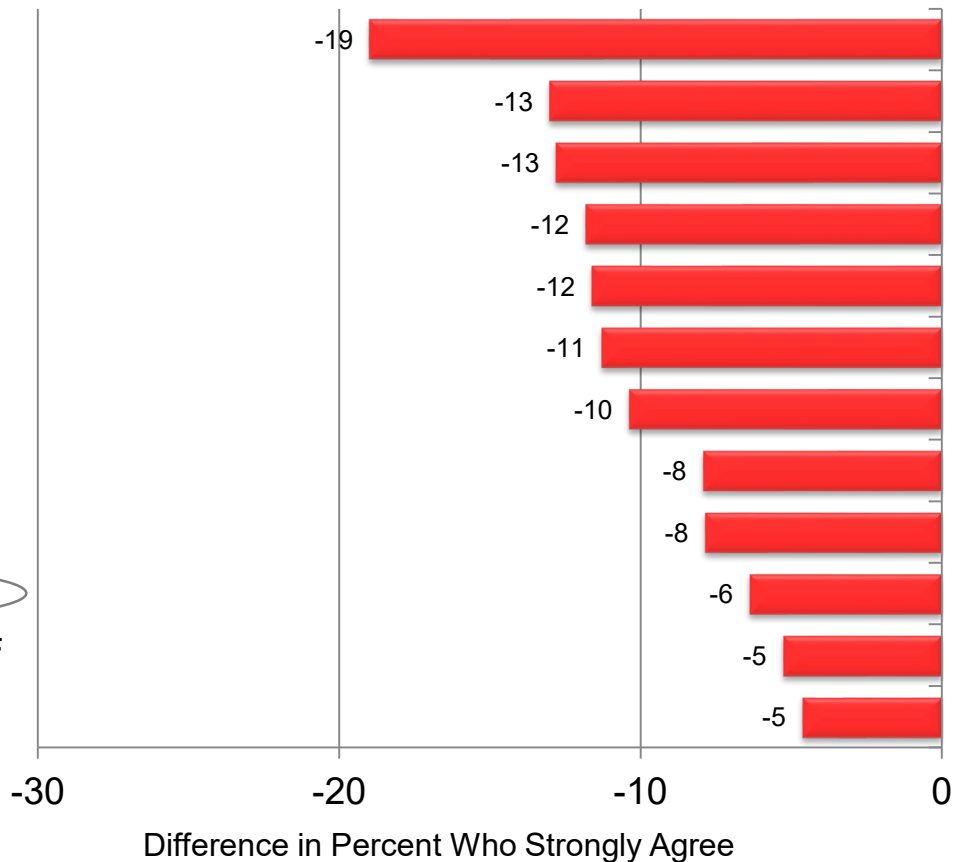
*Circled attributes are some of the most important image hot buttons for travelers

West Virginia Image Weaknesses vs. Maryland



Base: Total Travelers

- Exciting nightlife/entertainment/shows
- Offers a variety of dining options
- Great for theater and the performing arts
- Well-known landmarks
- Excellent shopping
- First-class hotels/resorts
- Well-known destination
- Noted for its unique local/ethnic cooking
- Great for swimming
- Lots of things to see and do
- Great for golf
- Popular with vacationers

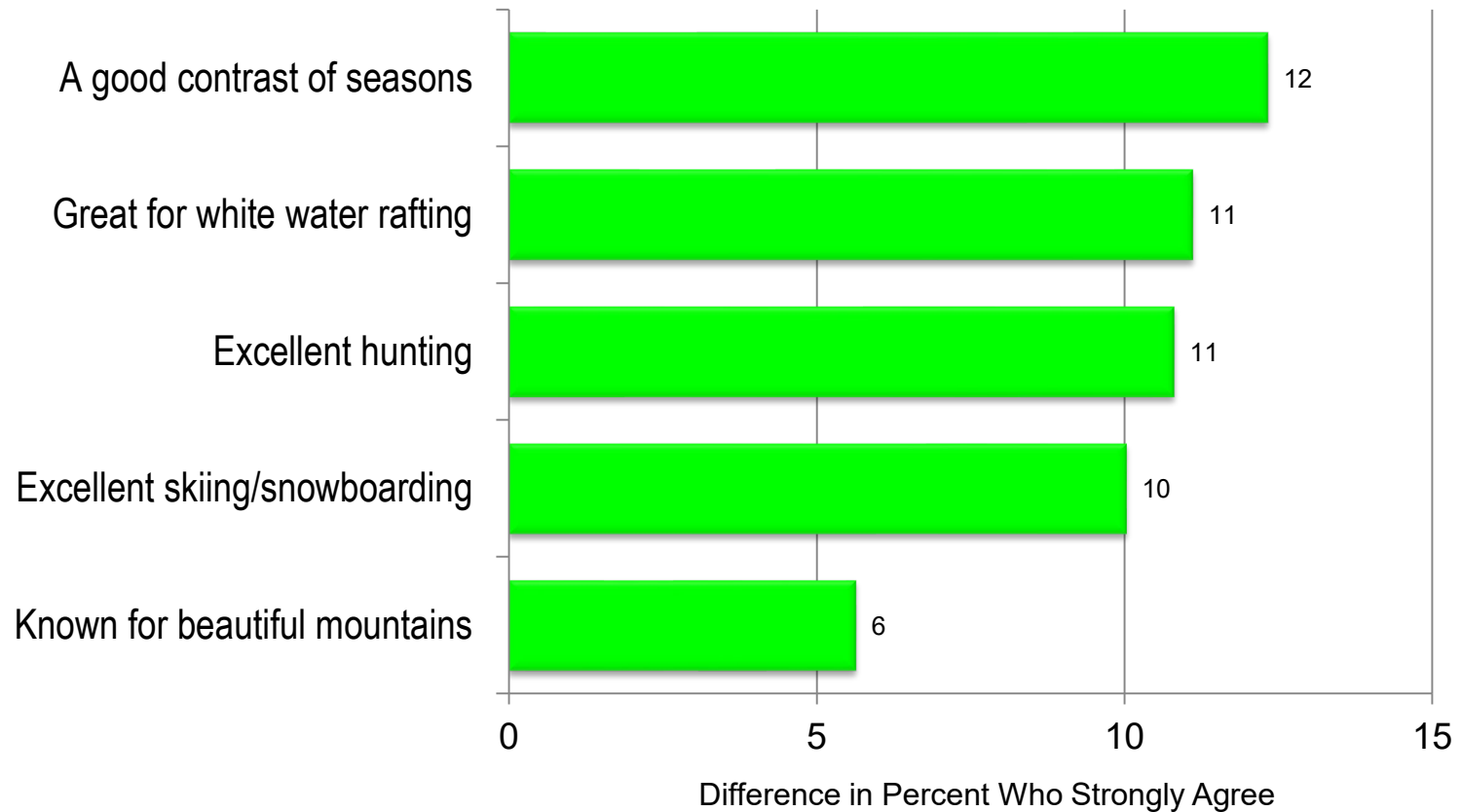


*Circled attributes are some of the most important image hot buttons for travelers

West Virginia Image Strengths vs. North Carolina



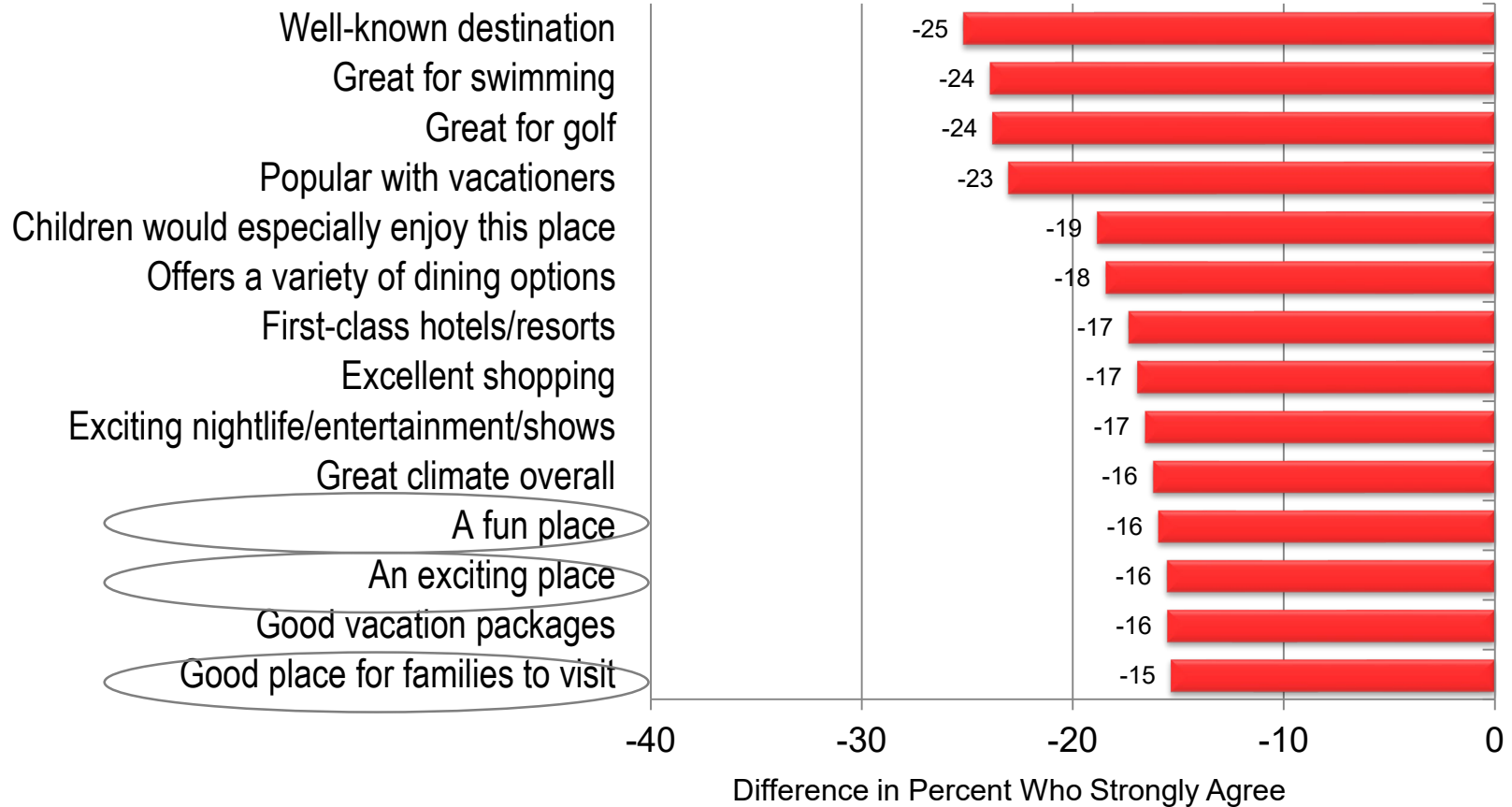
Base: Total Travelers



West Virginia Image Weaknesses vs. North Carolina



Base: Total Travelers

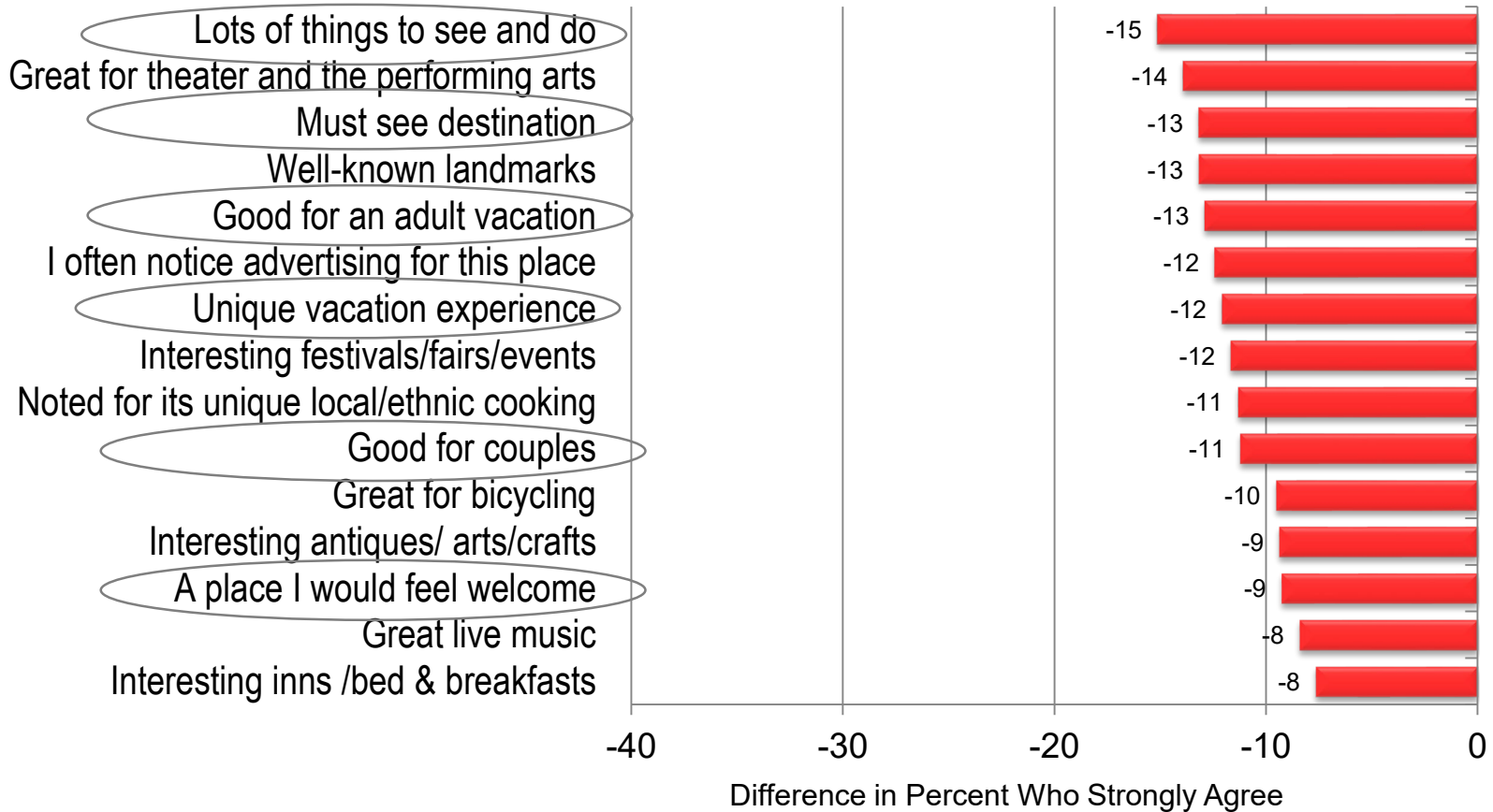


*Circled attributes are some of the most important image hot buttons for travelers

West Virginia Image Weaknesses vs. North Carolina (Cont'd)



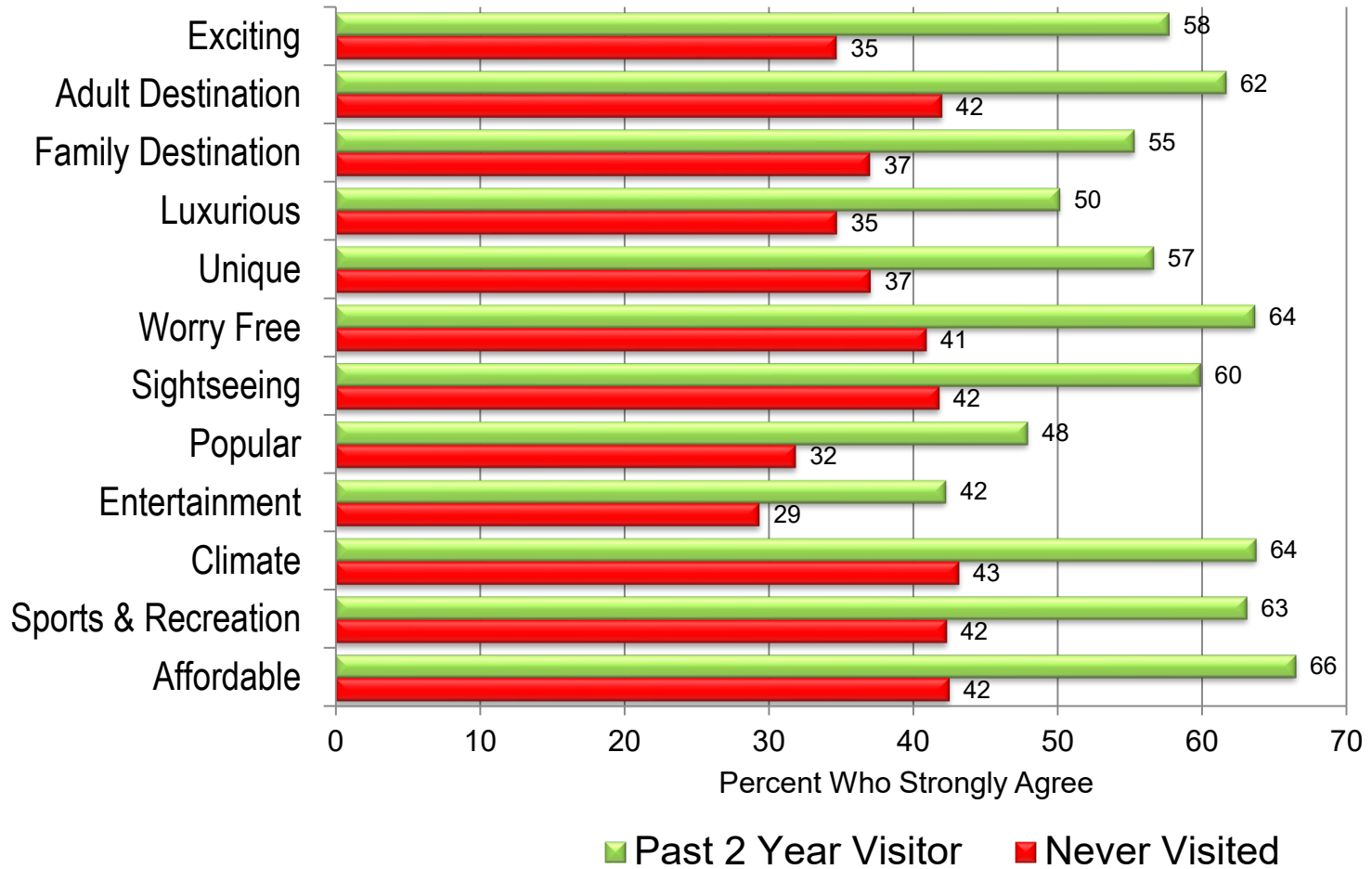
Base: Total Travelers



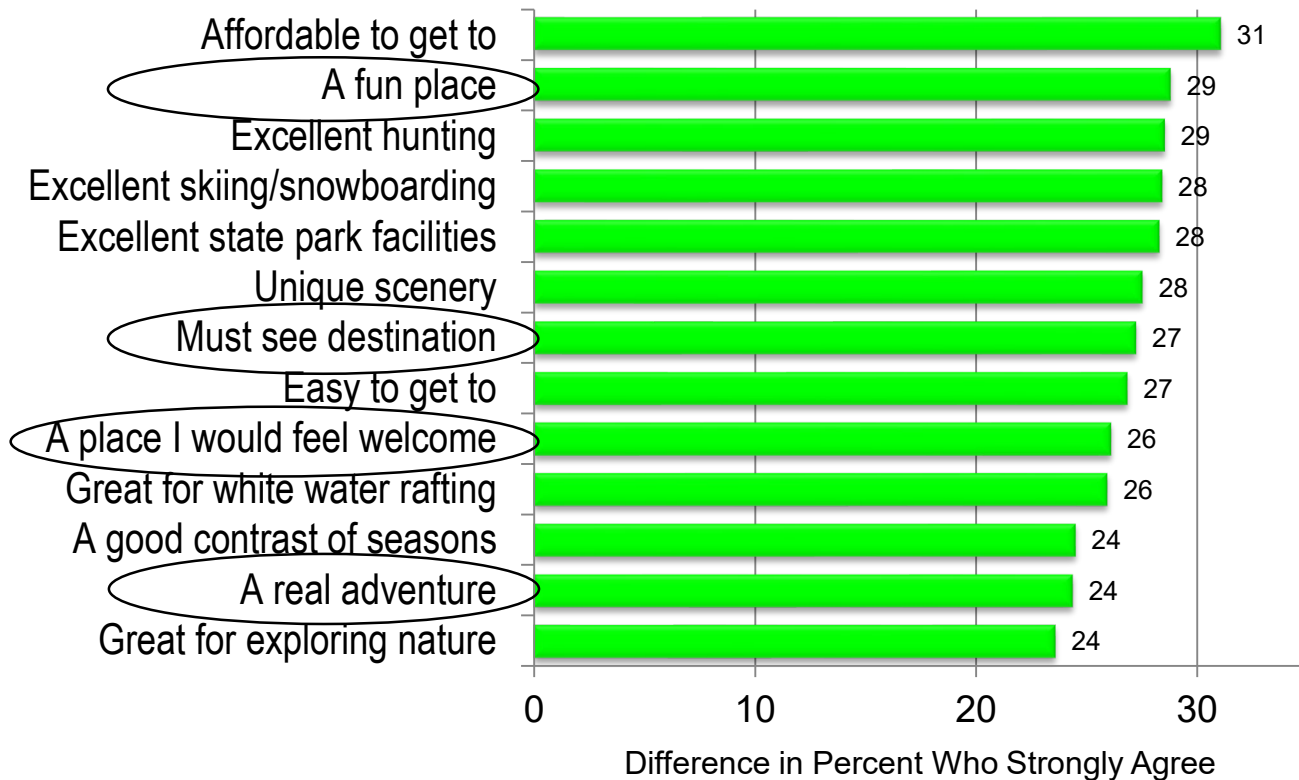
*Circled attributes are some of the most important image hot buttons for travelers

West Virginia's Product Delivery

West Virginia's Product vs. Image

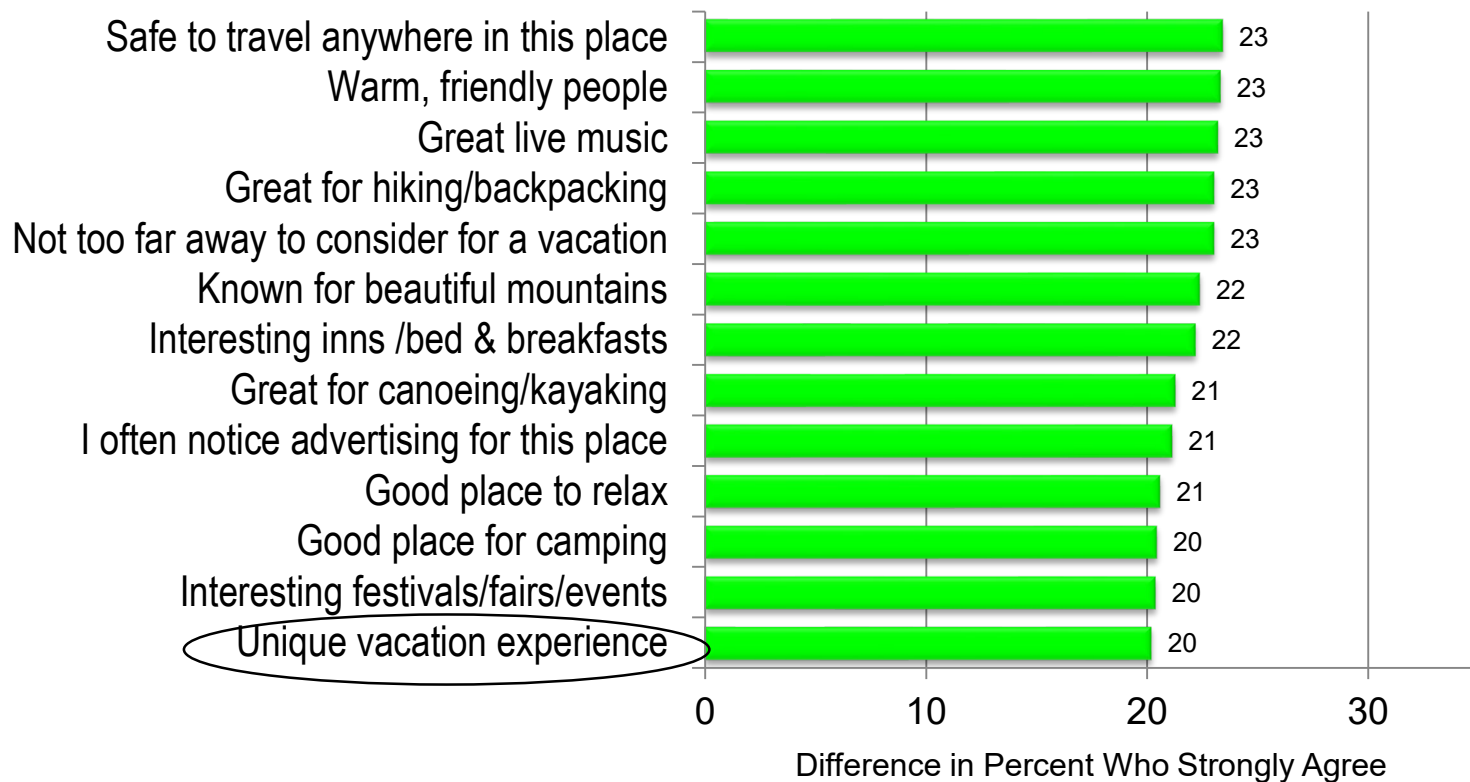


Top Product Strengths vs. Image



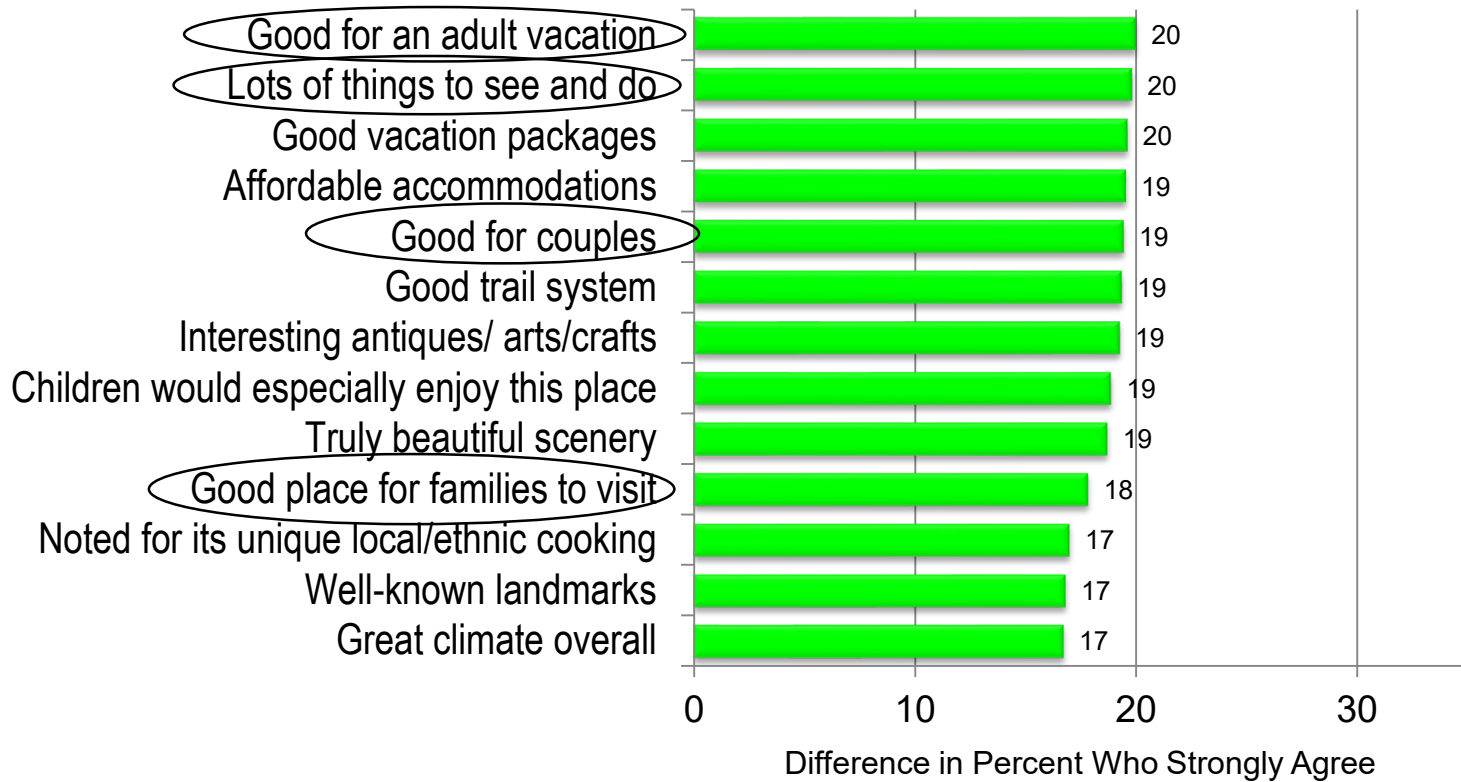
*Circled attributes are some of the most important image hot buttons for travelers

Top Product Strengths vs. Image (Cont'd)



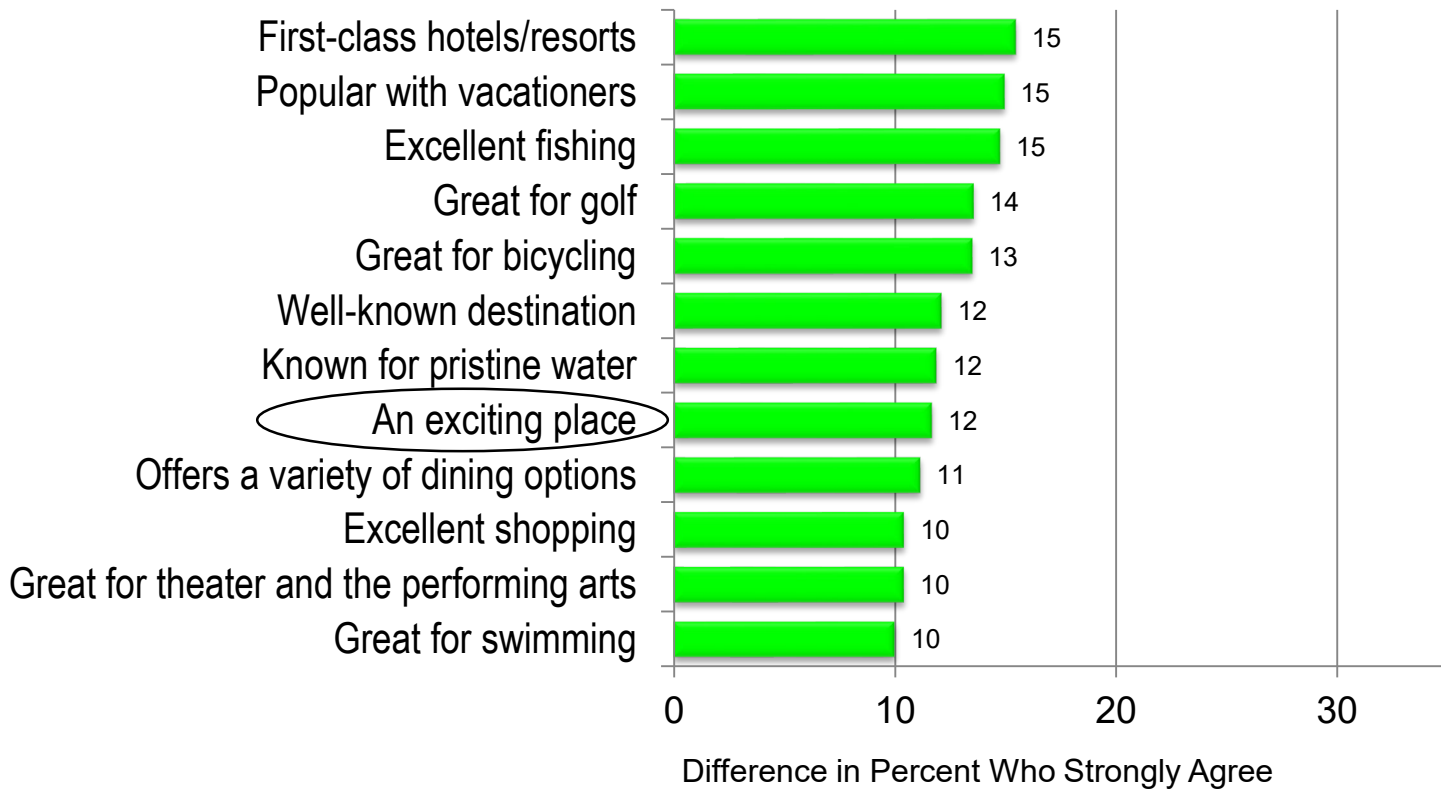
*Circled attributes are some of the most important image hot buttons for travelers

Top Product Strengths vs. Image (Cont'd)



*Circled attributes are some of the most important image hot buttons for travelers

Top Product Strengths vs. Image (Cont'd)



*Circled attributes are some of the most important image hot buttons for travelers

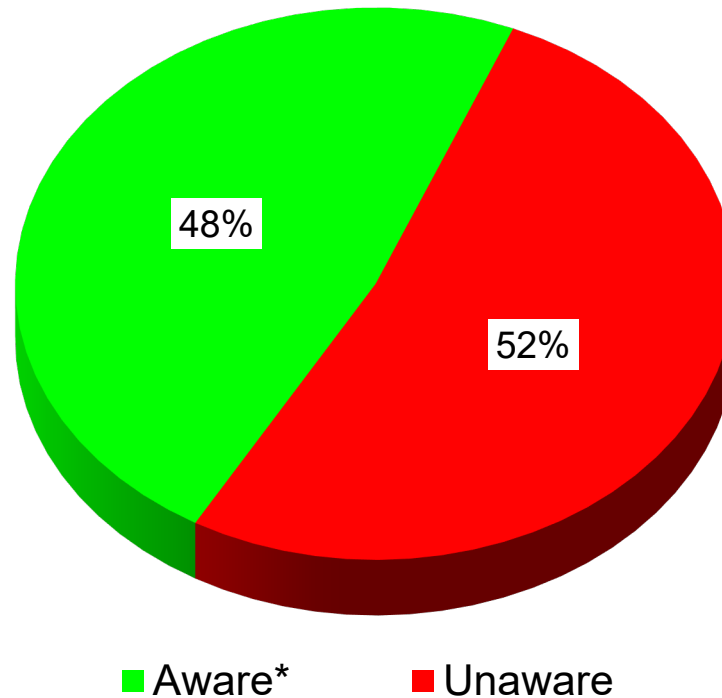
West Virginia's FY 2016 Advertising Campaign

Advertising Awareness

Awareness of FY 2016 Advertising



Base: Total Travelers



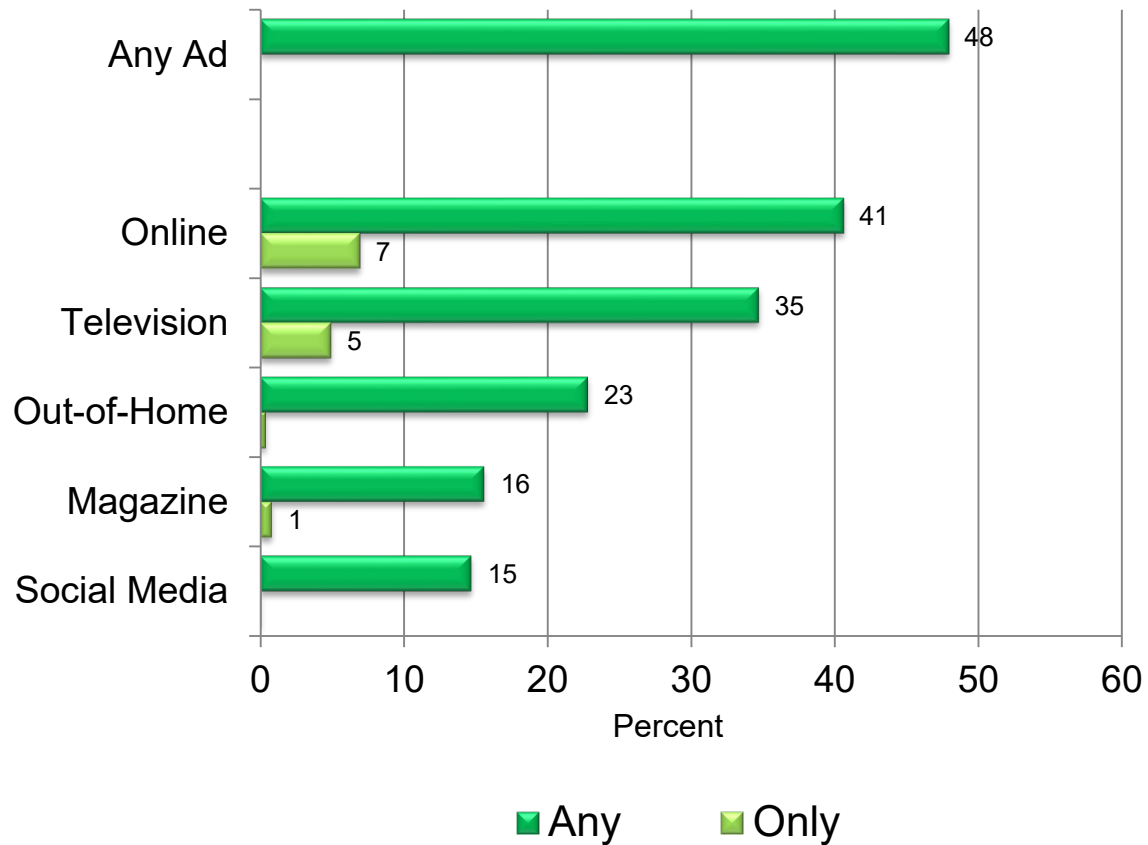
*Saw at least one ad

**While some comparisons have been made between the 2014 and 2016 research, it is important to note the 2014 research was conducted at the end of an advertising campaign that had been running for several years. The 2016 research was conducted at the start of a new advertising campaign that included new creative, new photos, new video, etc. In addition, the 2016 research does not account for any investments in new photography, video, content, production, etc.

Awareness by Type of Media



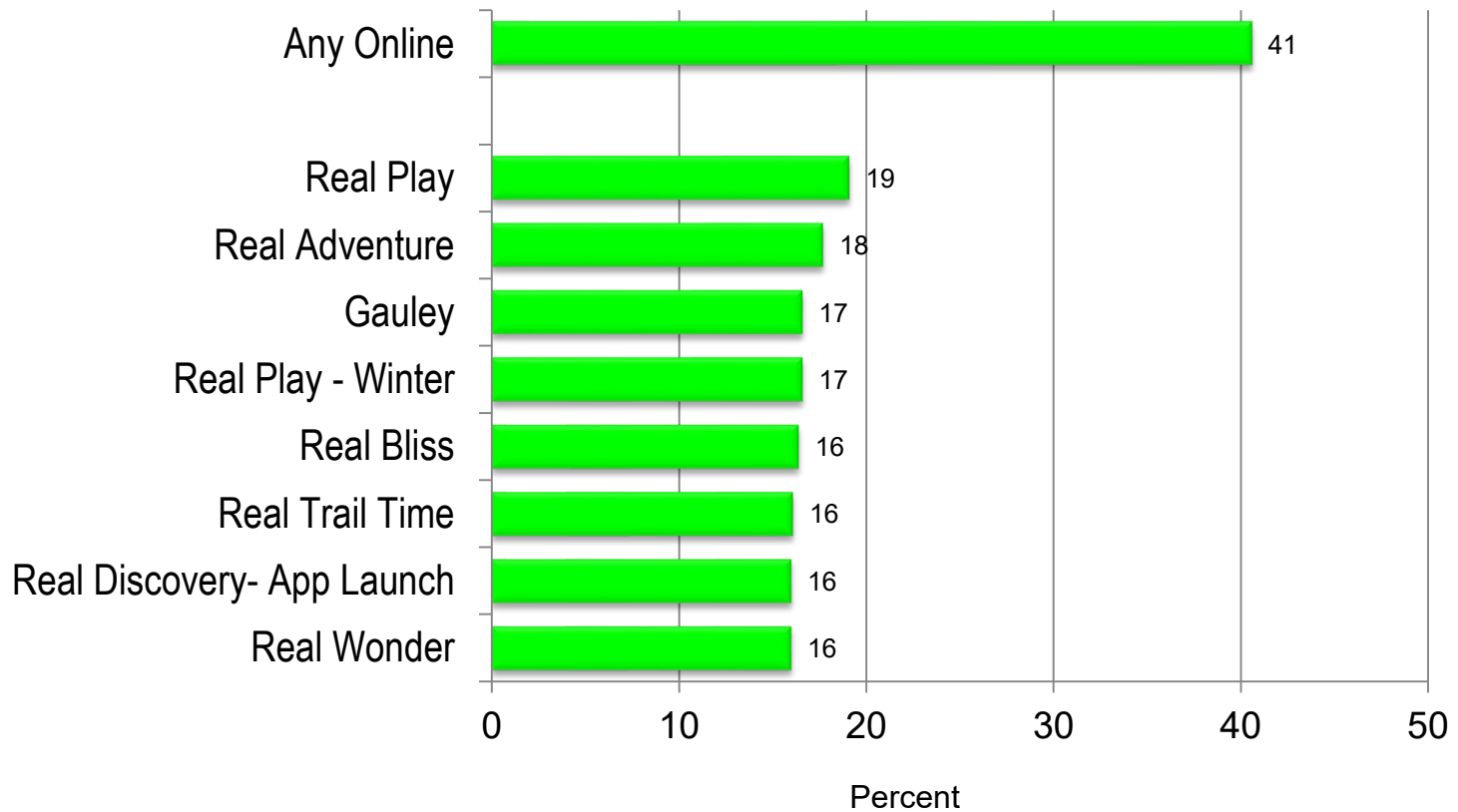
Base: Total Travelers



Awareness of Individual Ads — Online



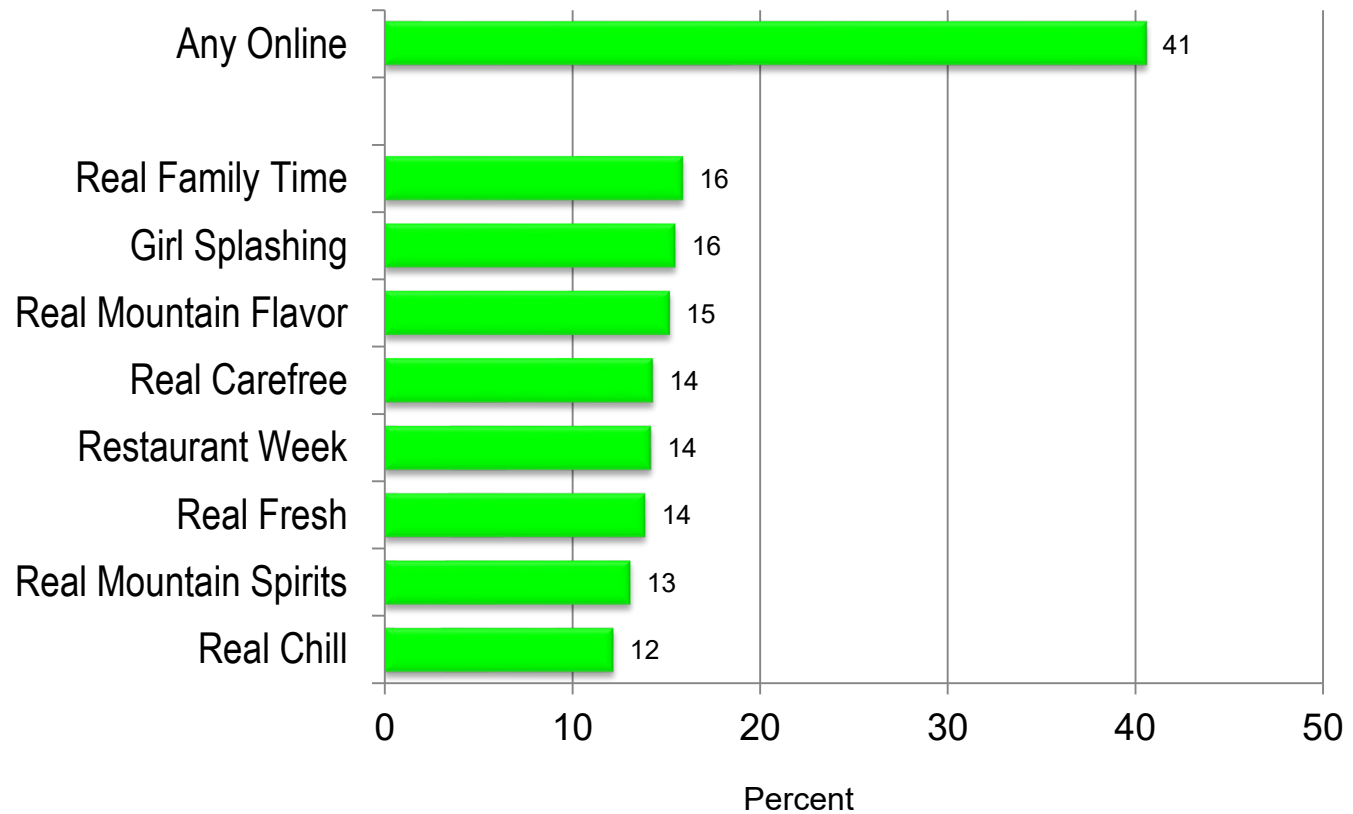
Base: Total Travelers



Awareness of Individual Ads — Online (Cont'd)



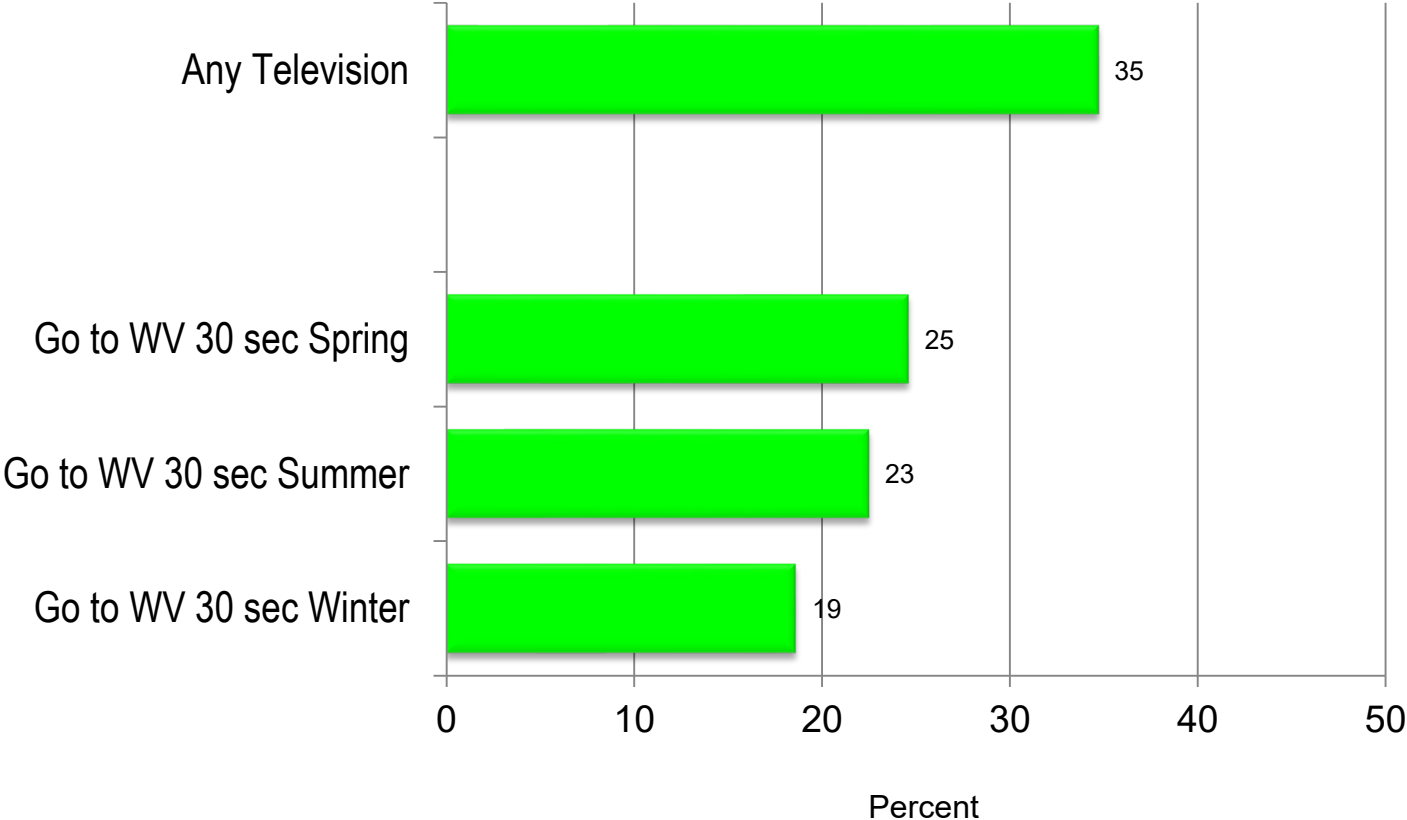
Base: Total Travelers



Awareness of Individual Ads — Television



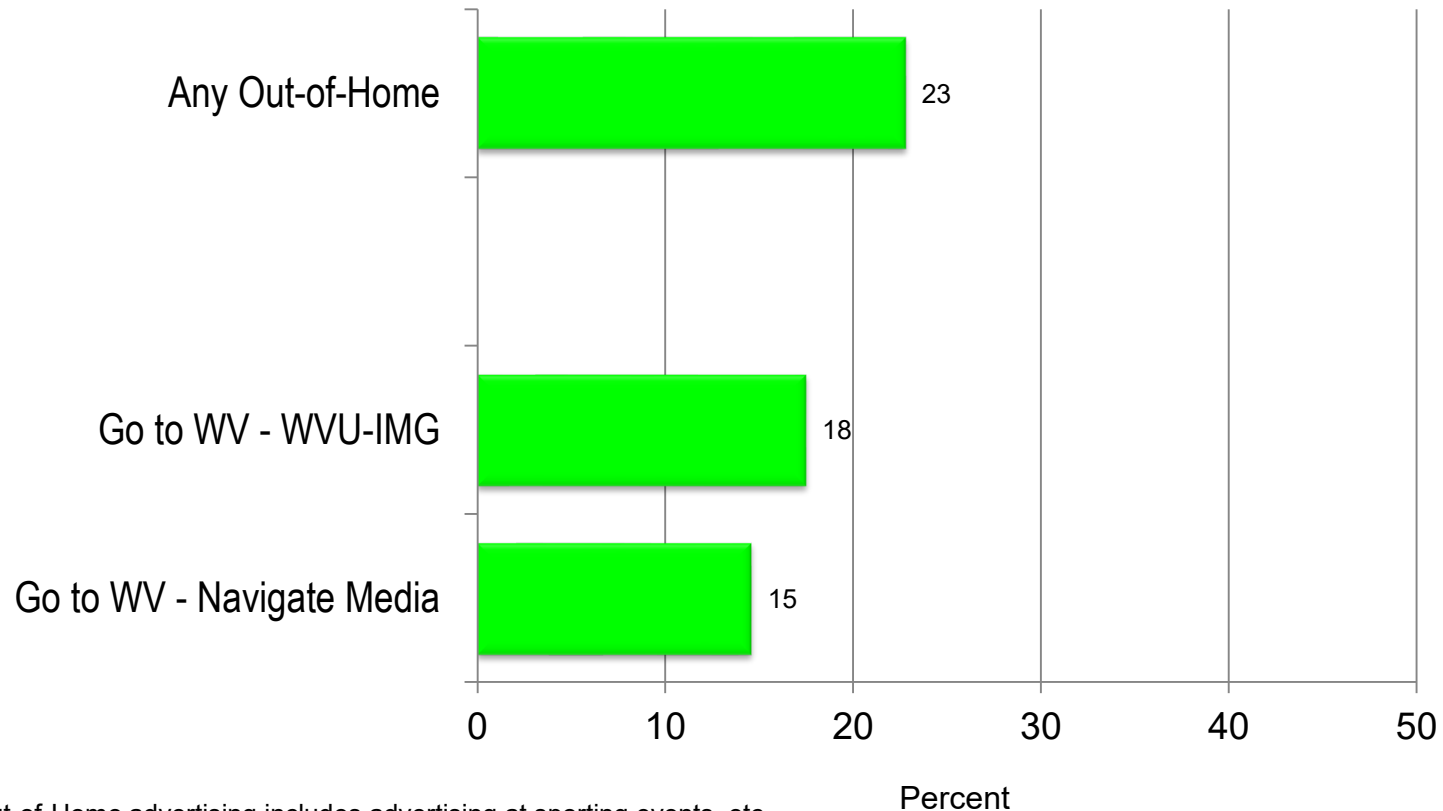
Base: Total Travelers



Awareness of Individual Ads — Out-of-Home



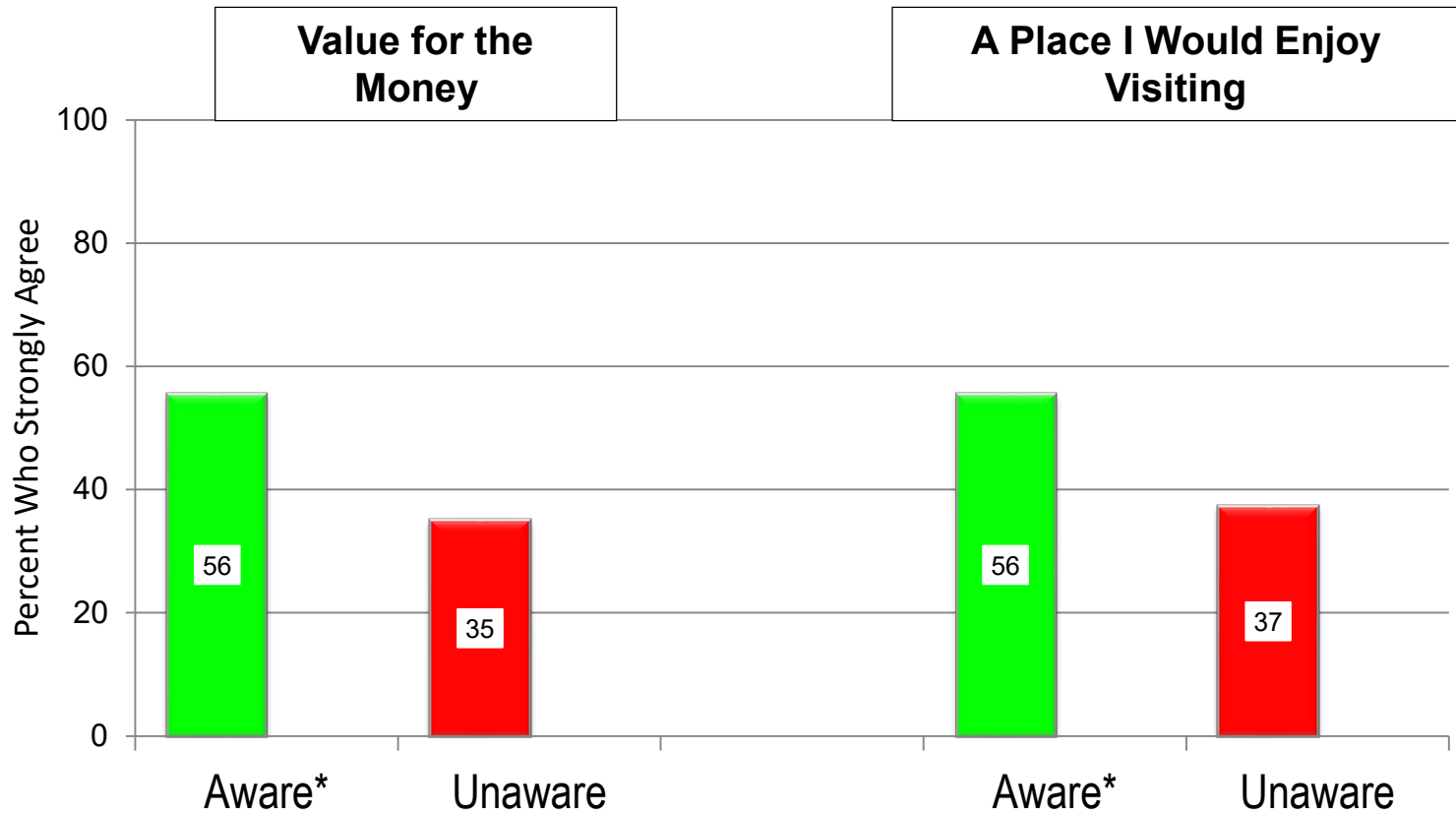
Base: Total Travelers



*Out-of-Home advertising includes advertising at sporting events, etc.

Impact of the FY 2016
Advertising Campaign
on West Virginia's Image

Impact on West Virginia's Overall Image

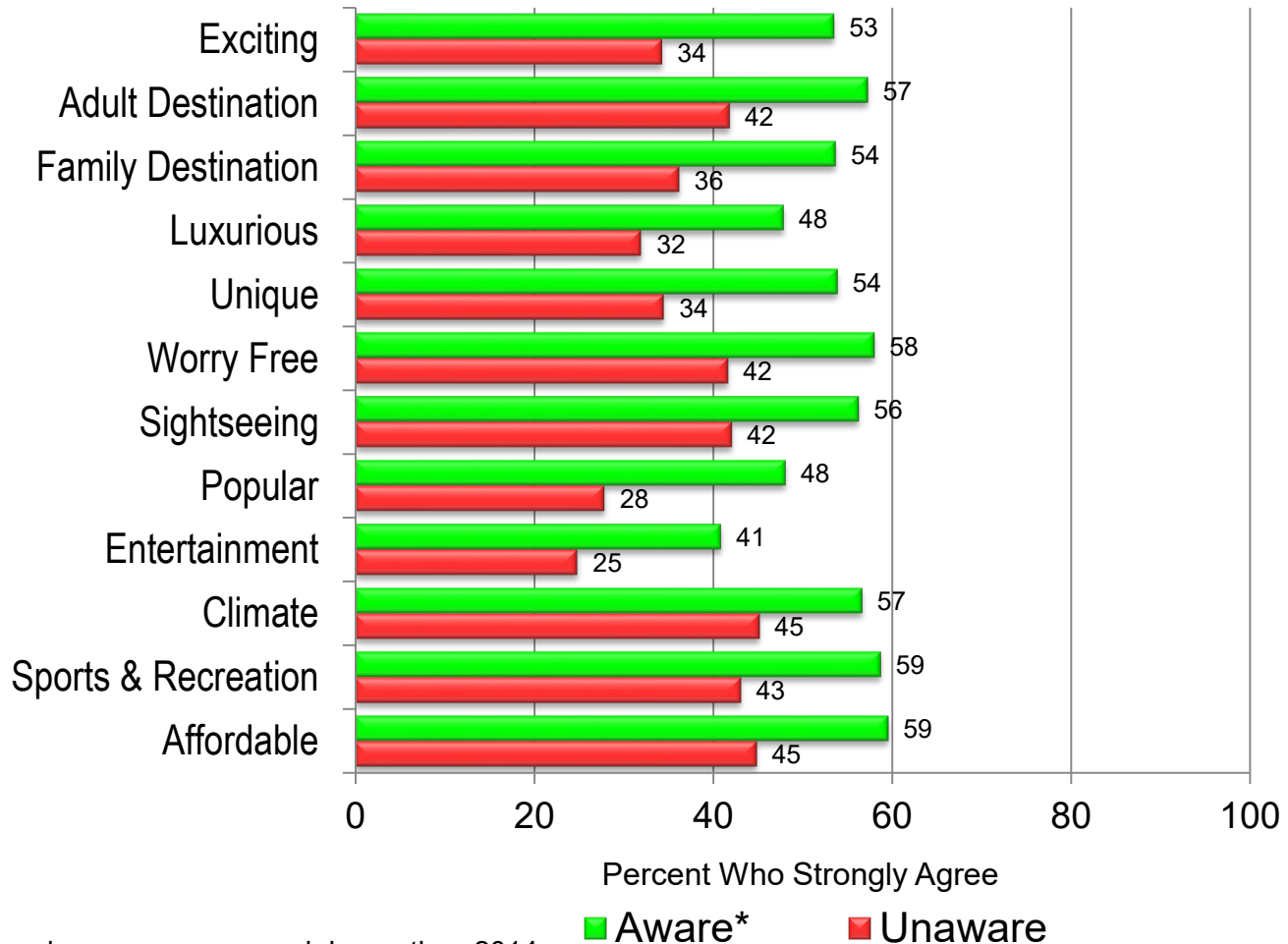


*Saw at least one ad.

Impact of FY 2016 Advertising on West Virginia's Image



Base: Total Travelers



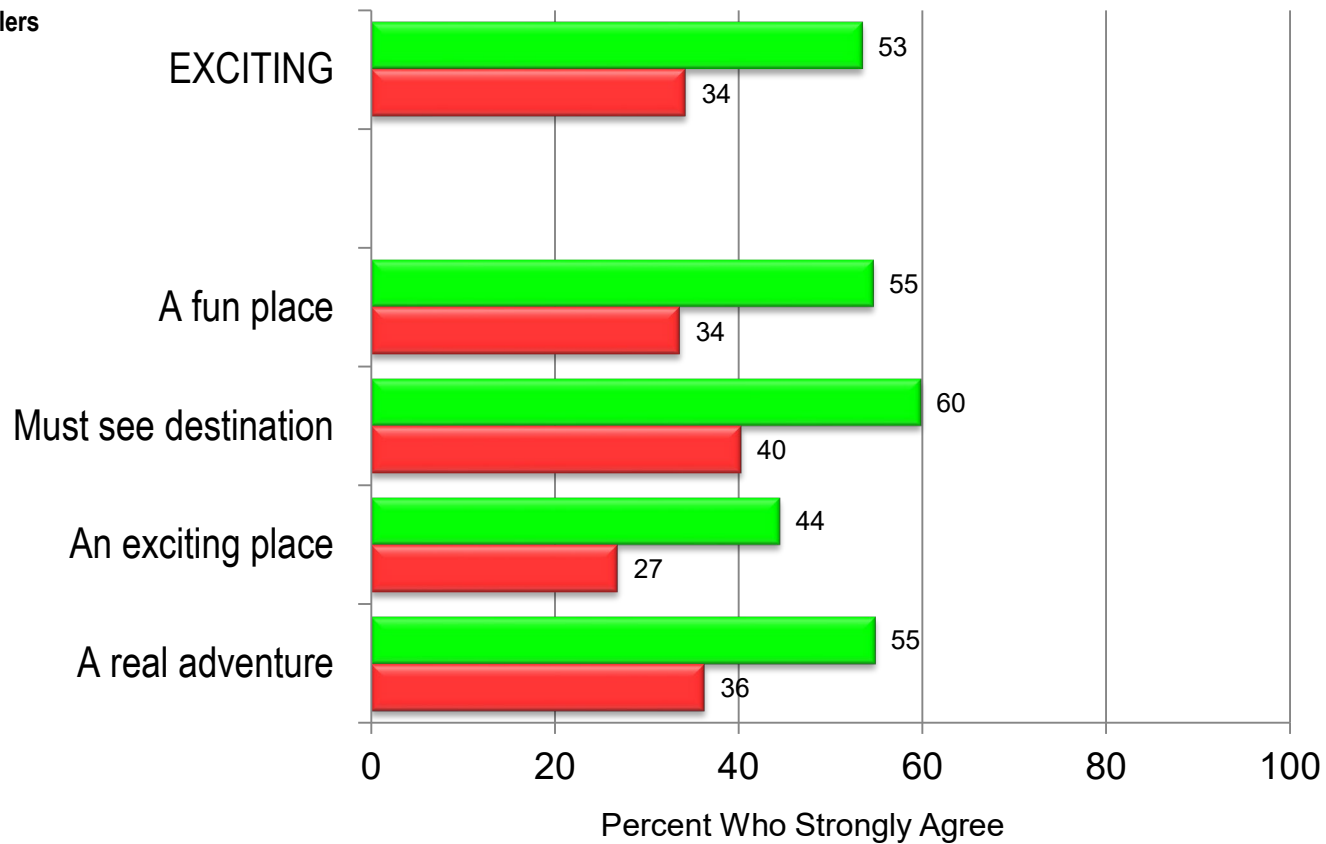
*Saw at least one ad.

**The lifts between aware and unaware were much larger than 2014.

West Virginia's Image — Exciting



Base: Total Travelers



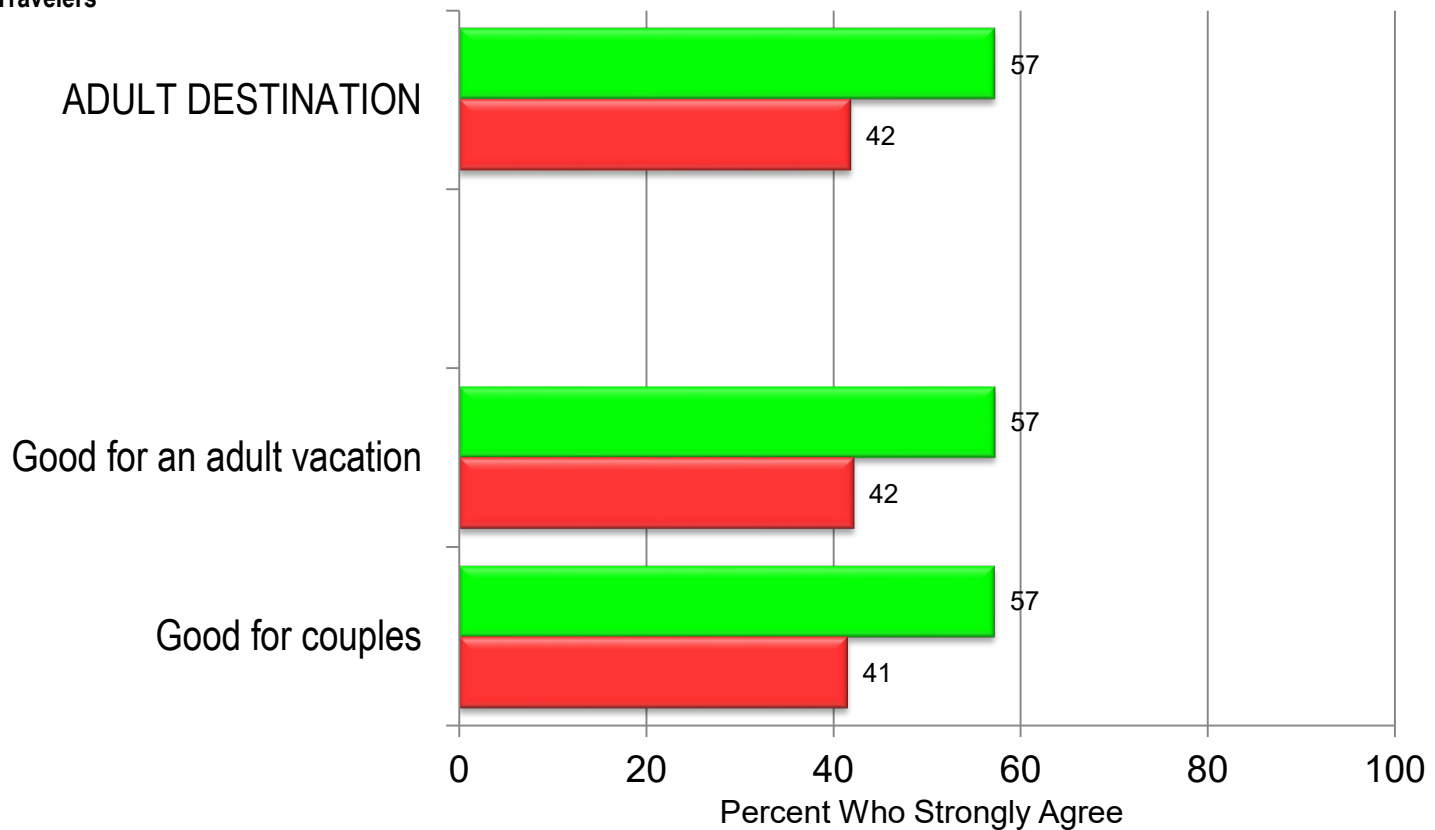
*Saw at least one ad.

■ Aware* ■ Unaware

West Virginia's Image — Adult Destination



Base: Total Travelers



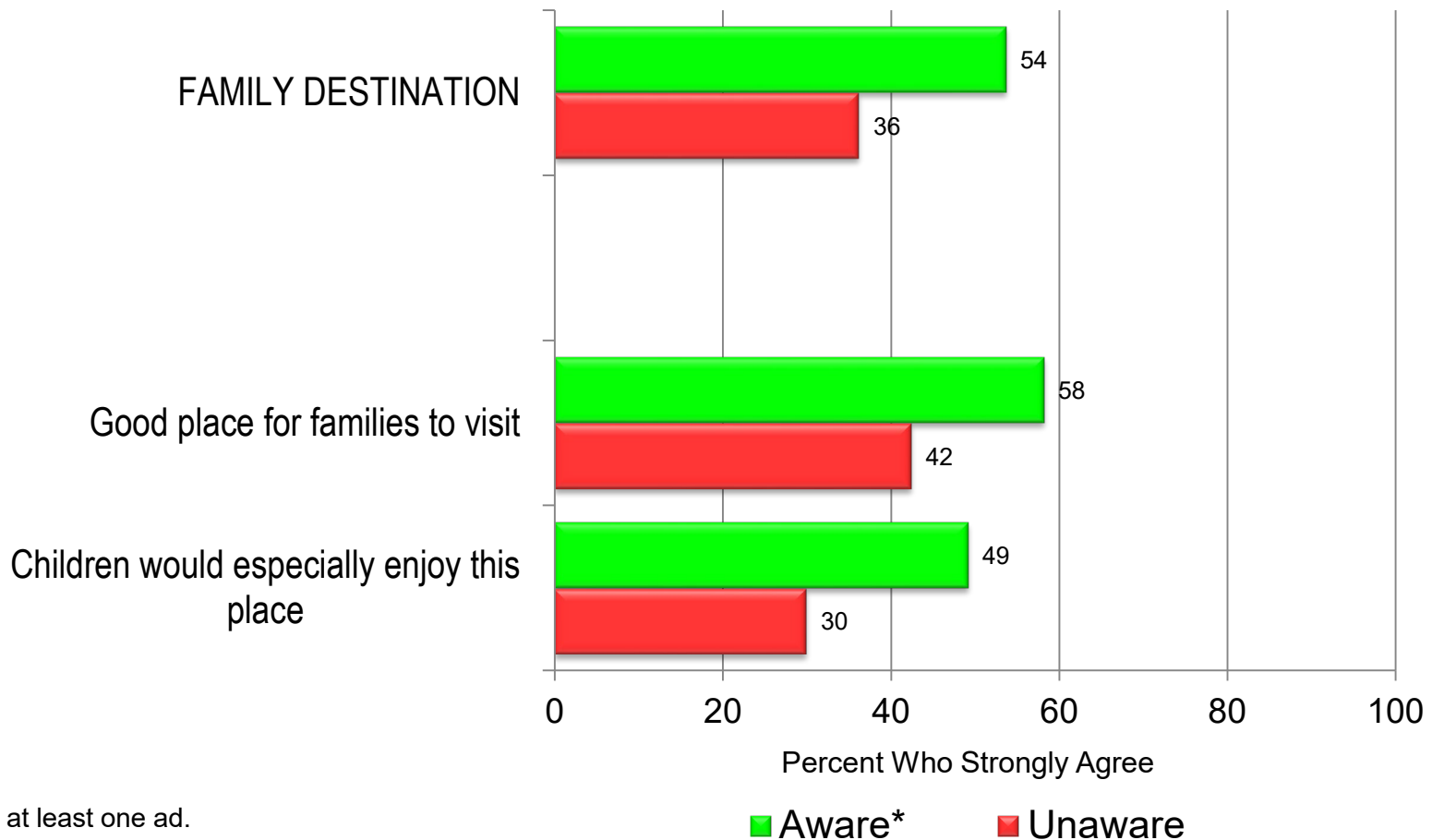
*Saw at least one ad.

■ Aware* ■ Unaware

West Virginia's Image — Family Destination



Base: Total Travelers



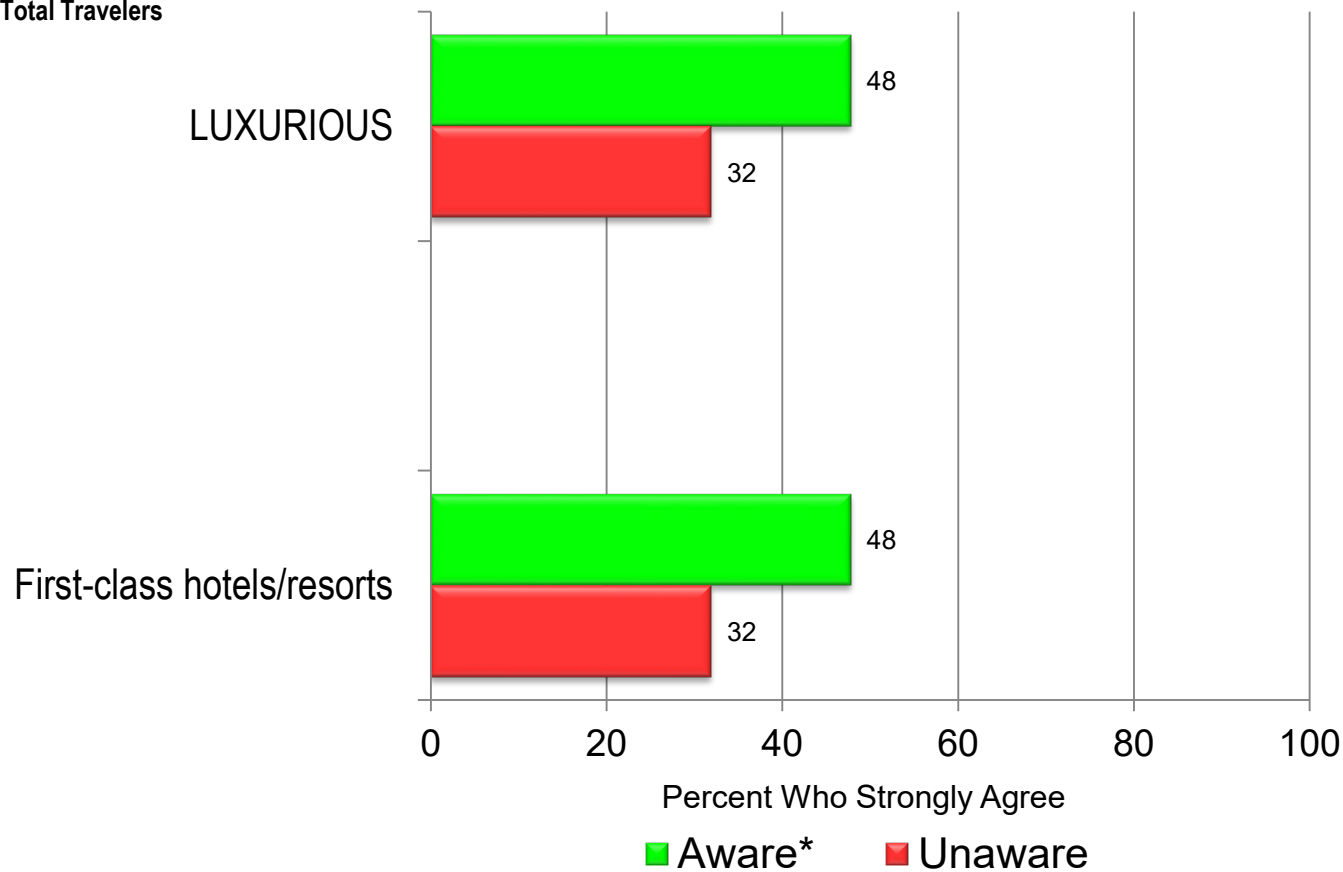
*Saw at least one ad.

■ Aware* ■ Unaware

West Virginia's Image — Luxurious



Base: Total Travelers

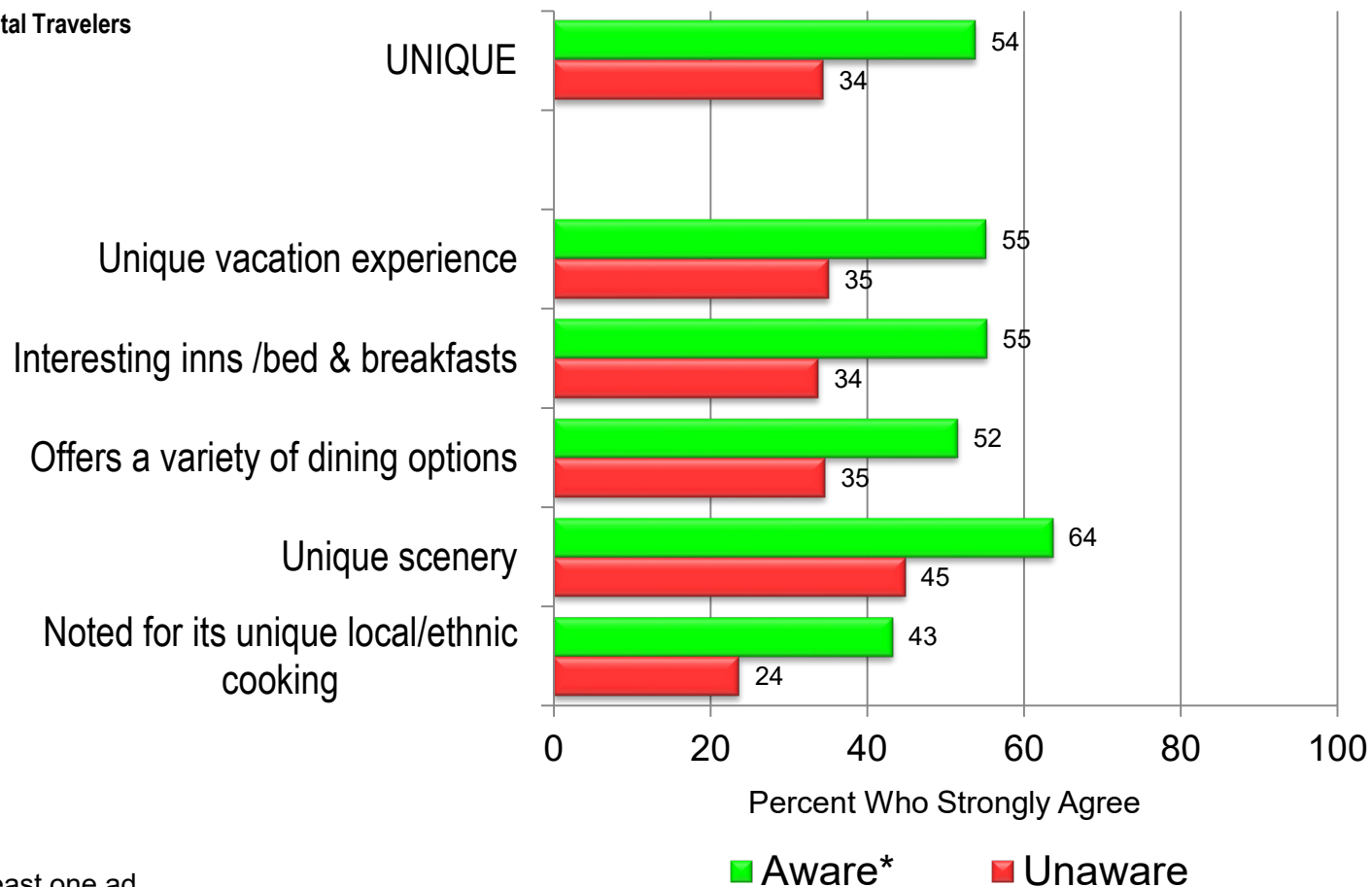


*Saw at least one ad.

West Virginia's Image — Unique



Base: Total Travelers



*Saw at least one ad.

West Virginia's Image — Worry Free



Base: Total Travelers

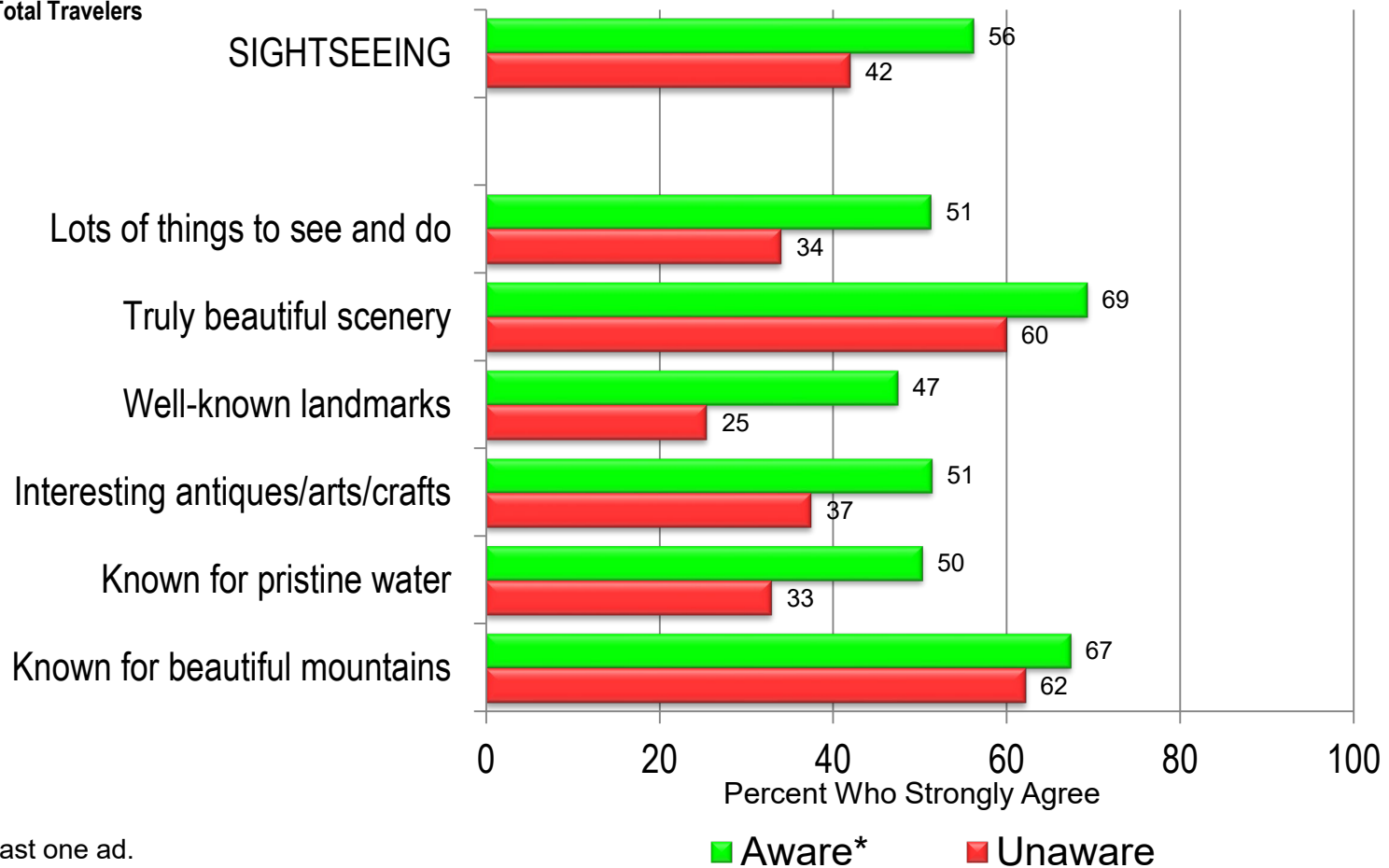


*Saw at least one ad.

West Virginia's Image — Sightseeing



Base: Total Travelers

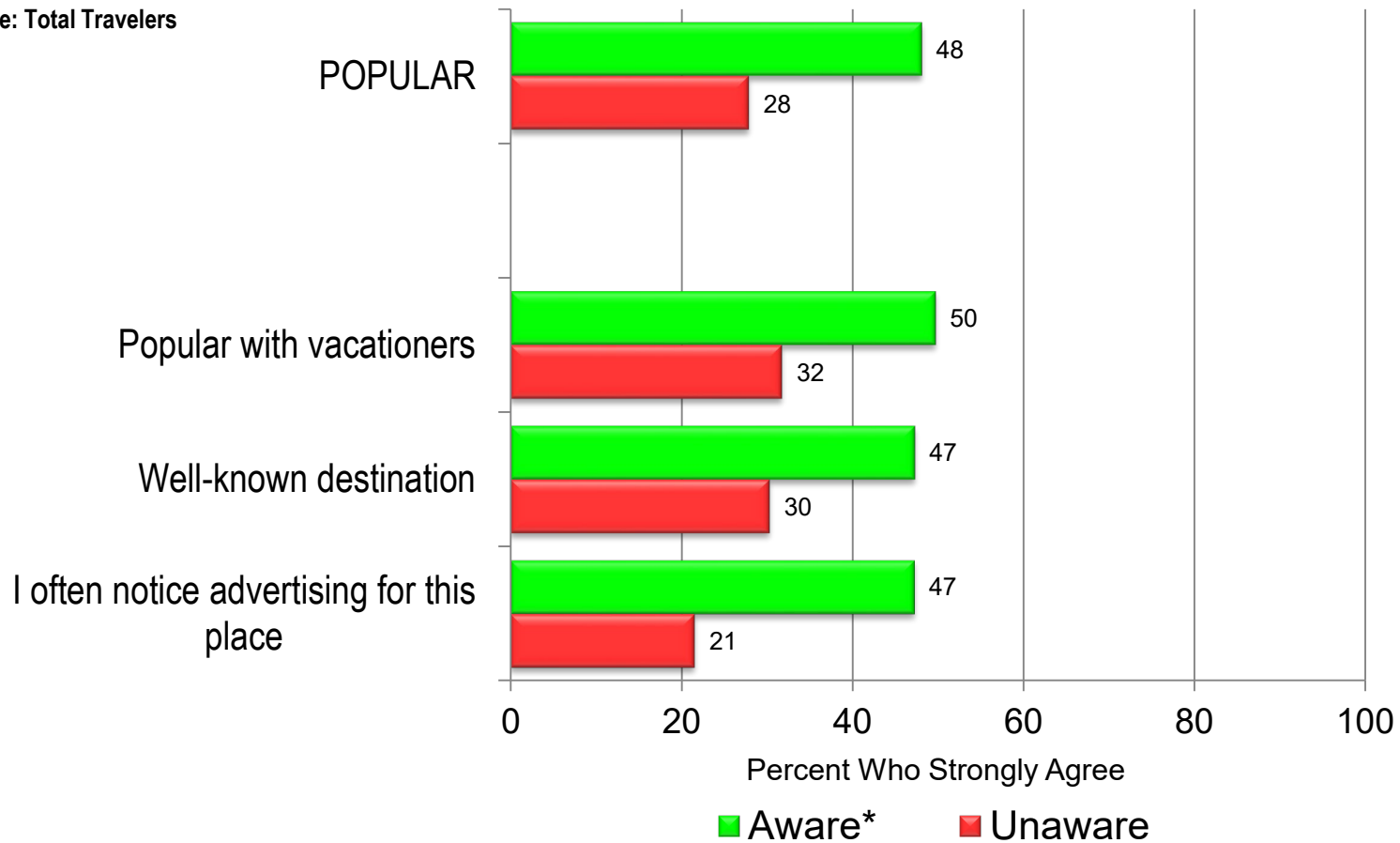


*Saw at least one ad.

West Virginia's Image — Popular



Base: Total Travelers

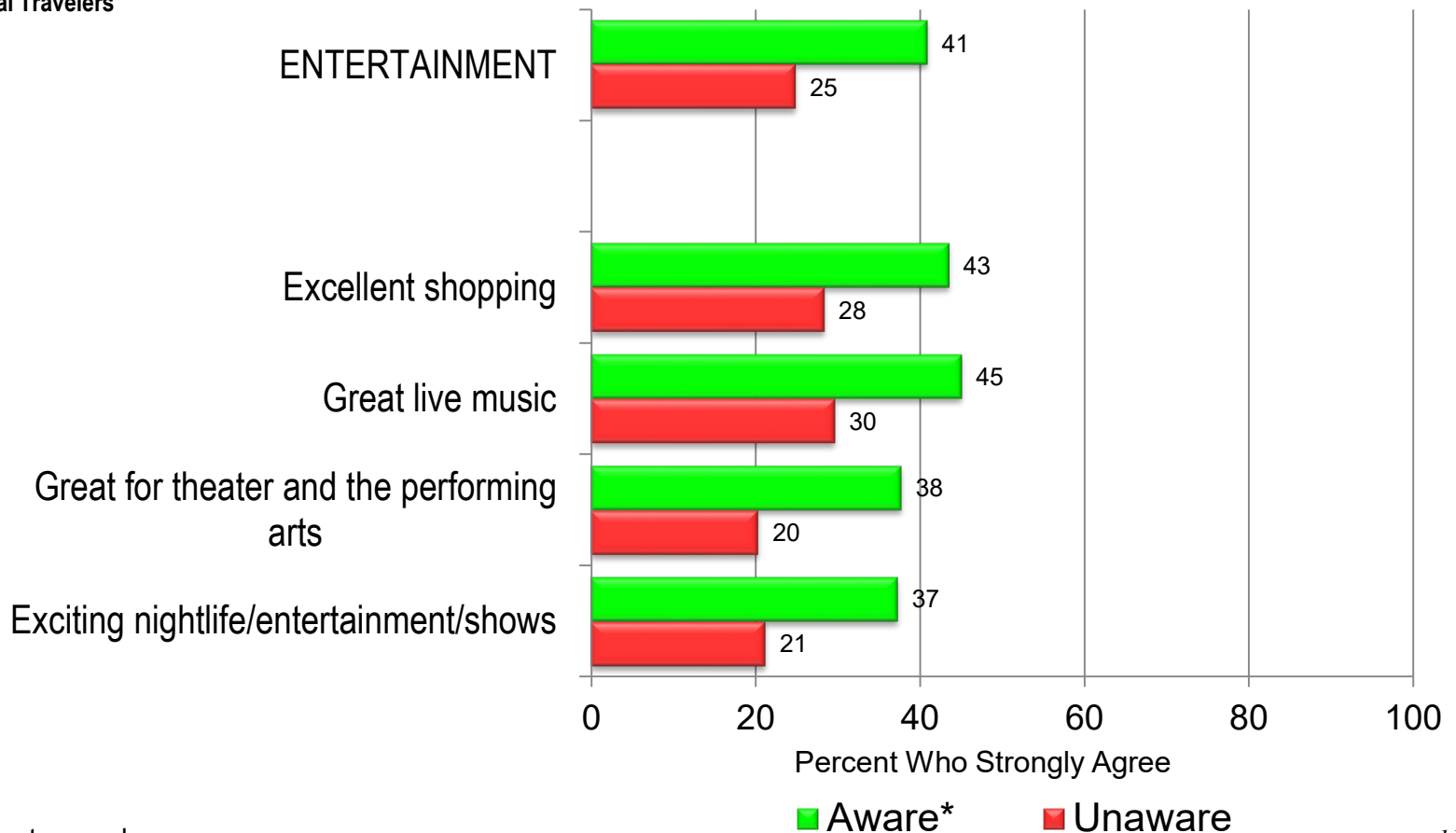


*Saw at least one ad.

West Virginia's Image — Entertainment



Base: Total Travelers

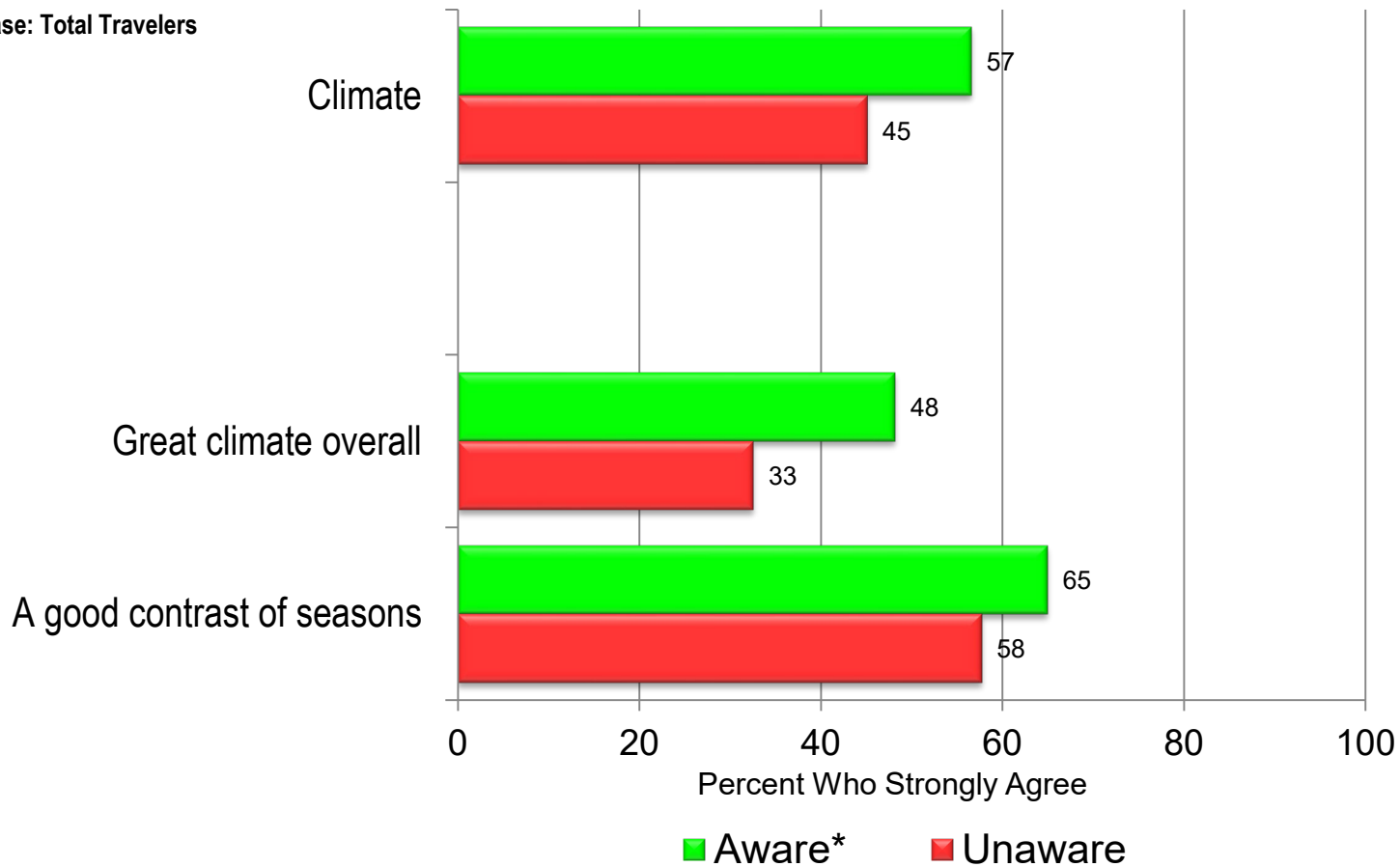


*Saw at least one ad.

West Virginia's Image — Climate



Base: Total Travelers

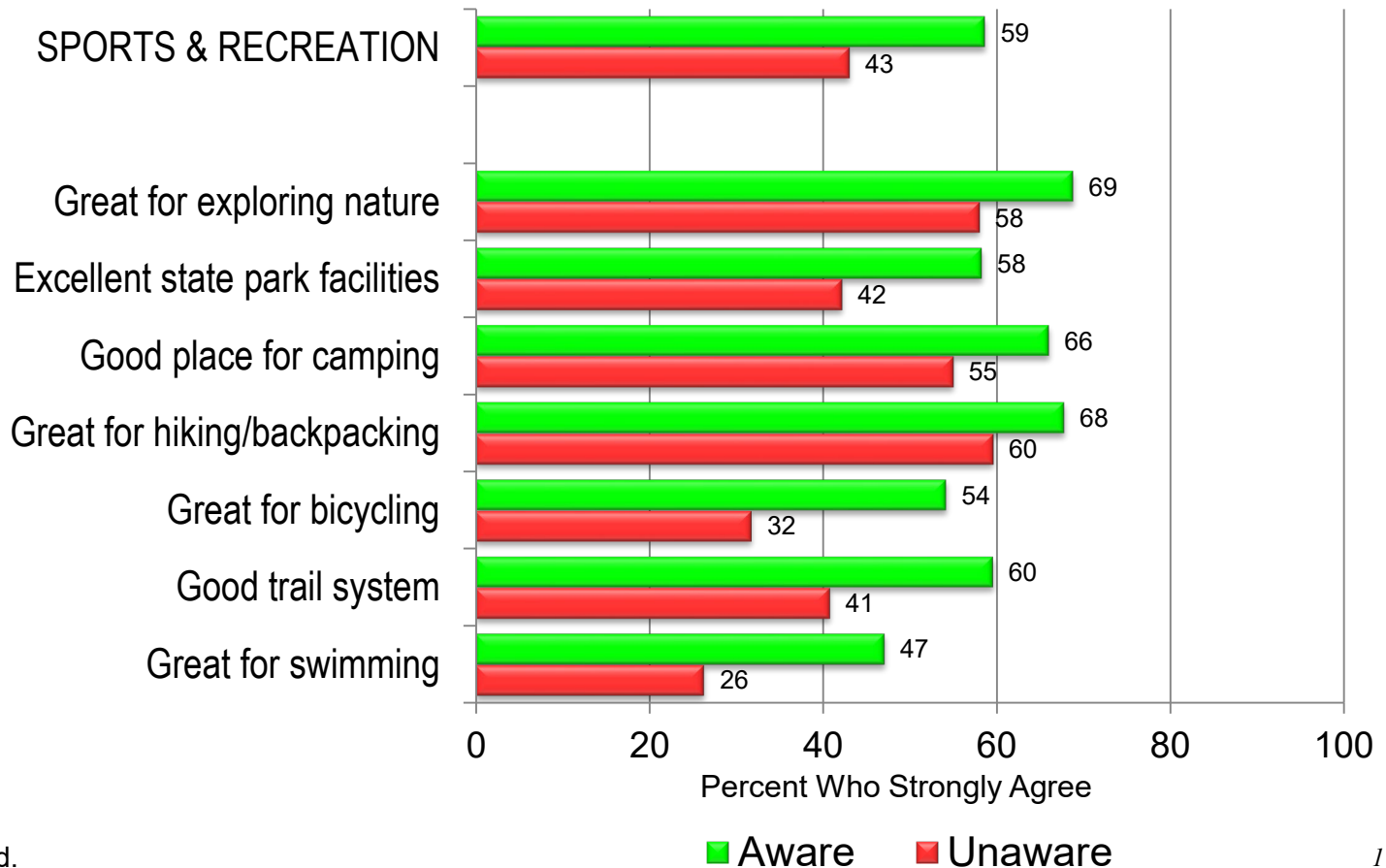


*Saw at least one ad.

West Virginia's Image — Sports & Recreation



Base: Total Travelers

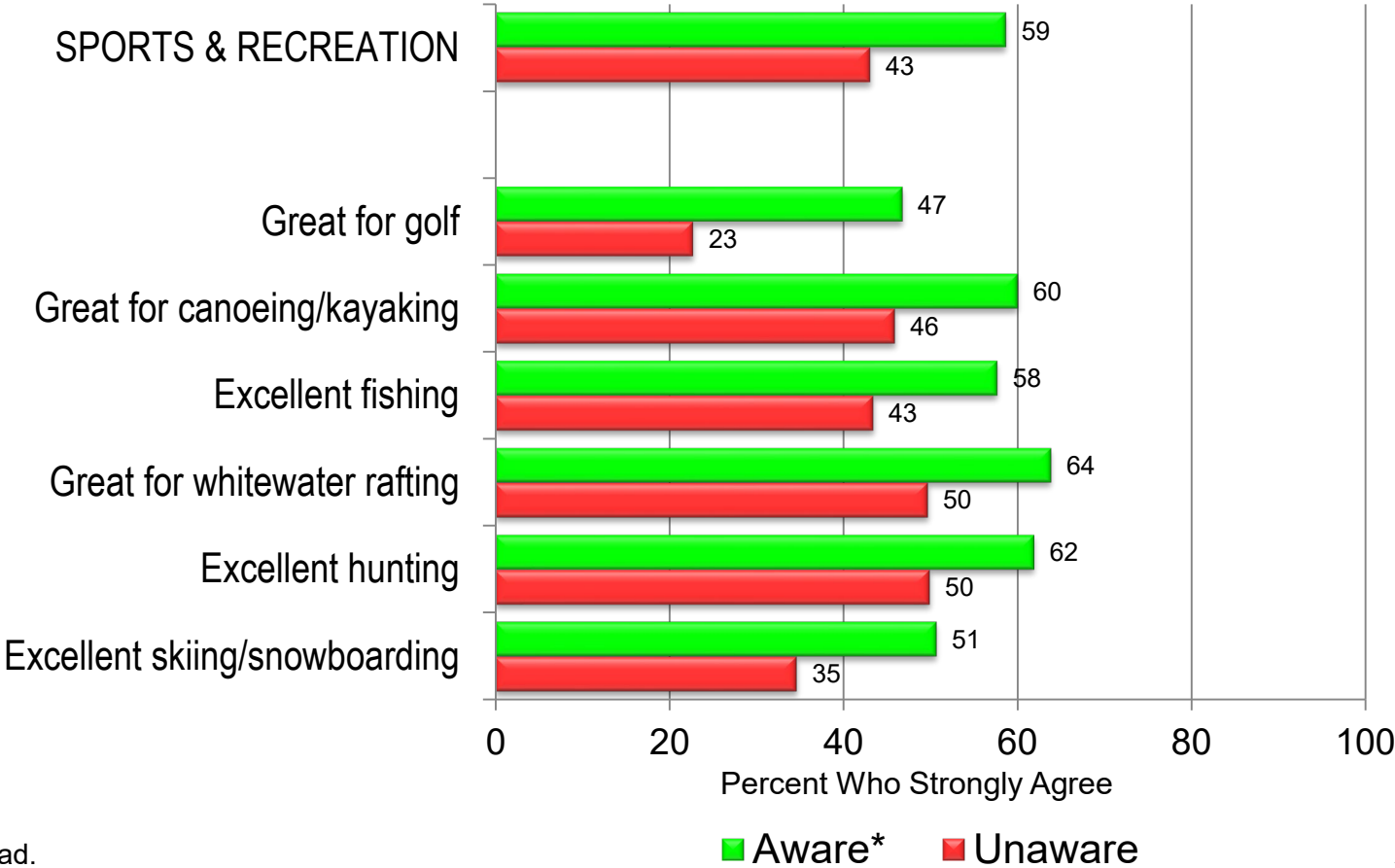


*Saw at least one ad.

West Virginia's Image — Sports & Recreation (Cont'd)



Base: Total Travelers

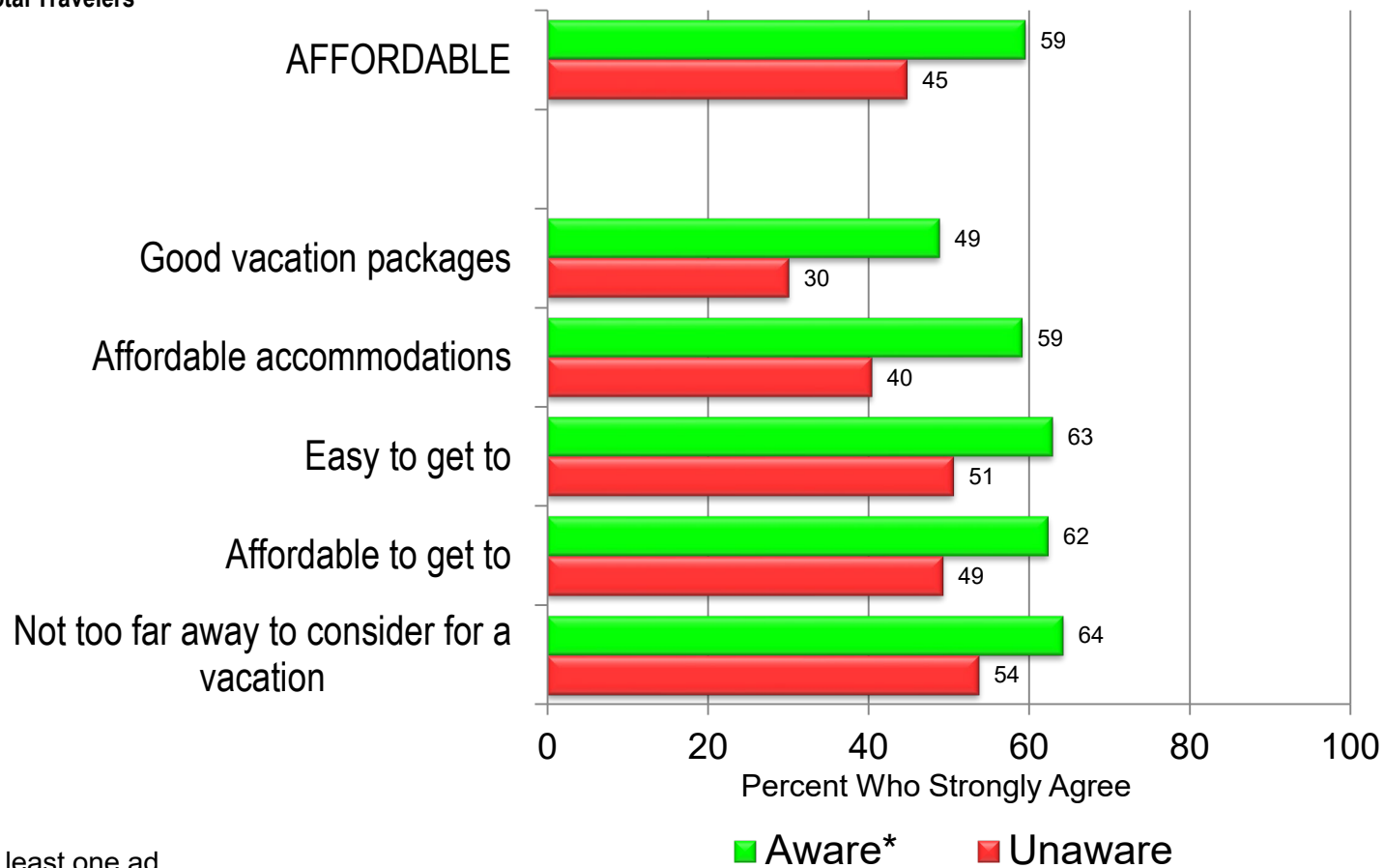


*Saw at least one ad.

West Virginia's Image — Affordable



Base: Total Travelers

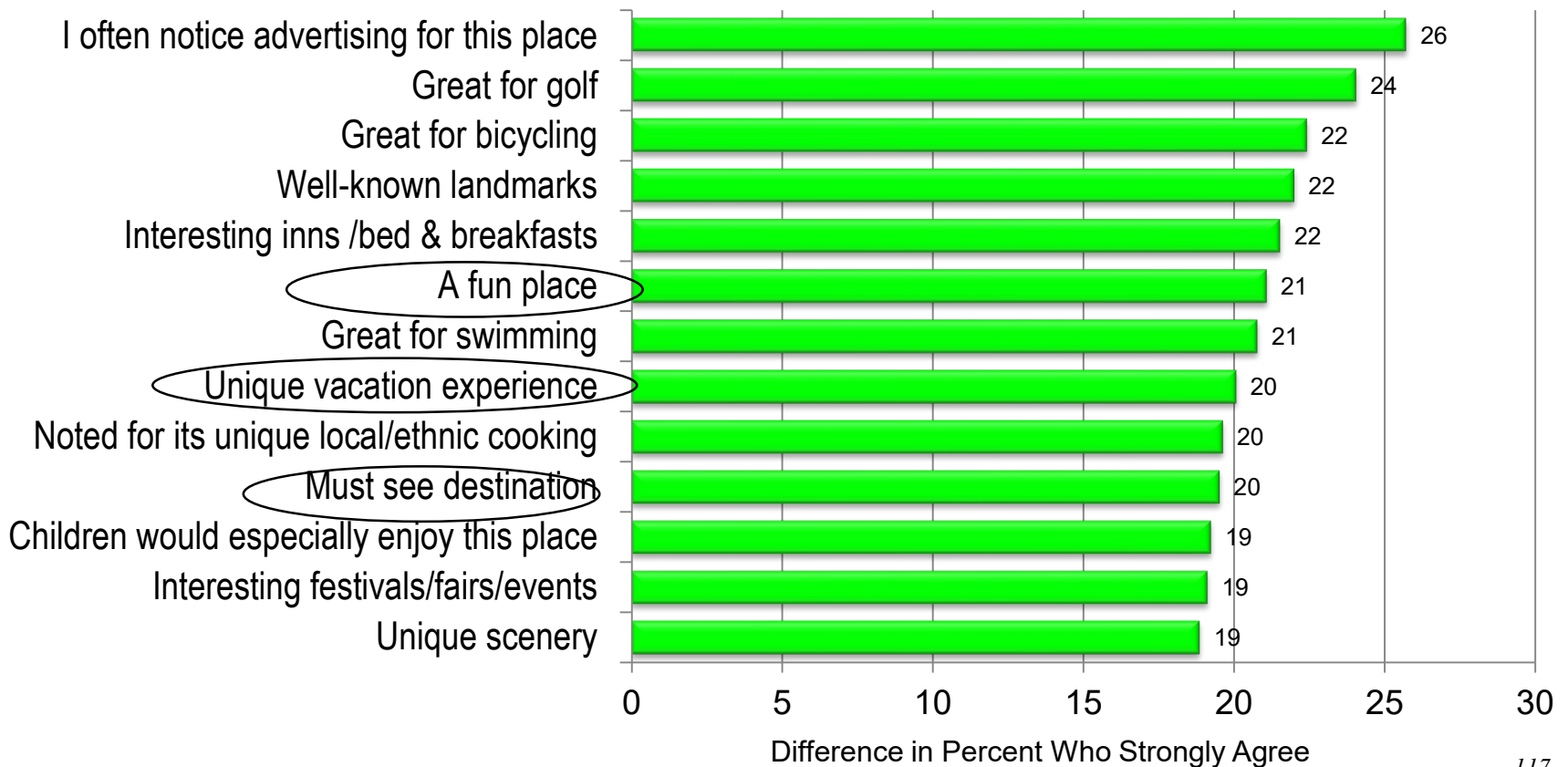


*Saw at least one ad.

Attributes for Which the Campaign Had the Greatest Impact



Base: Total Travelers

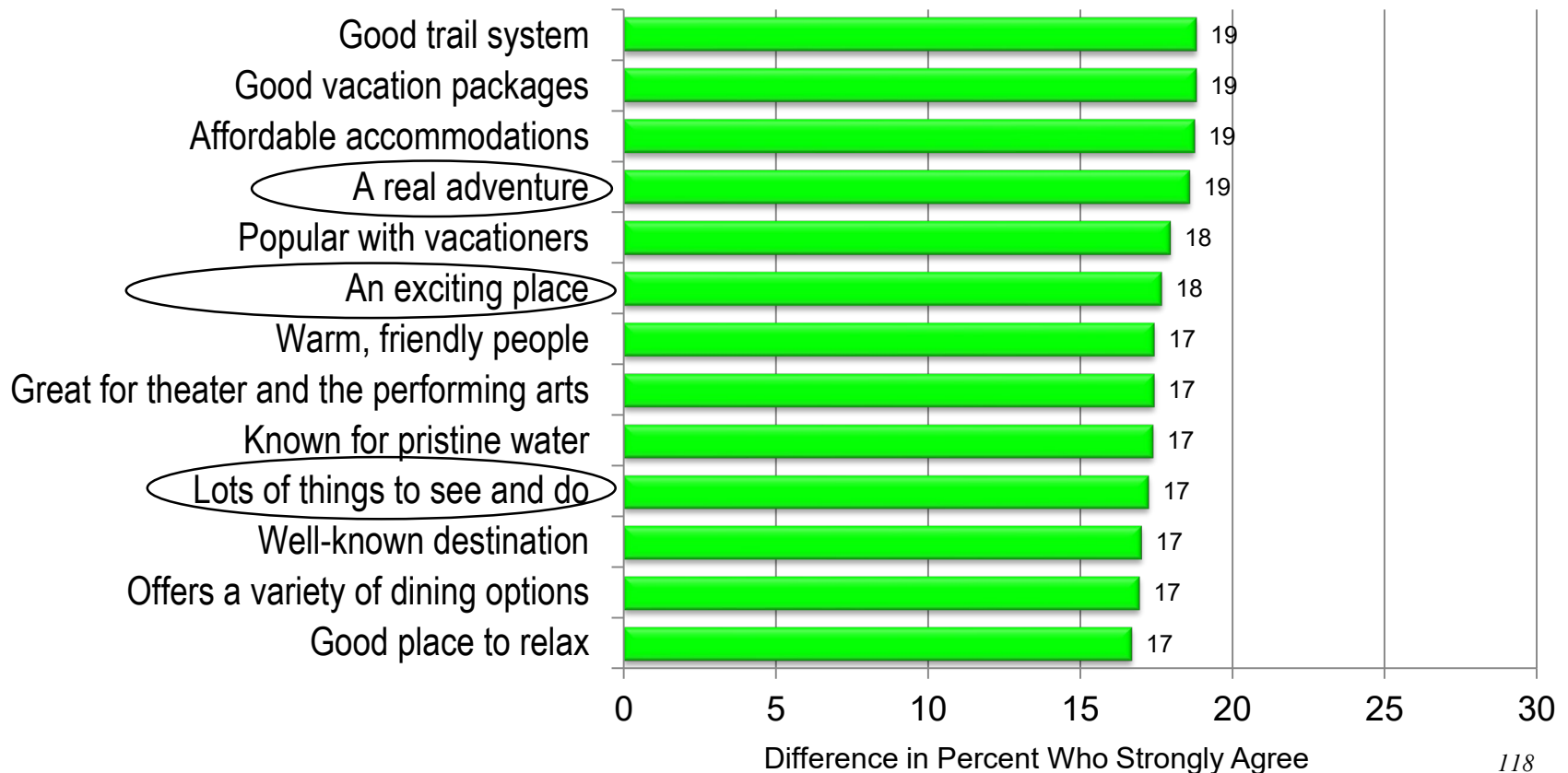


* Circled attributes are some of the most important image hot buttons for travelers

Attributes for Which the Campaign Had the Greatest Impact (Cont'd)



Base: Total Travelers

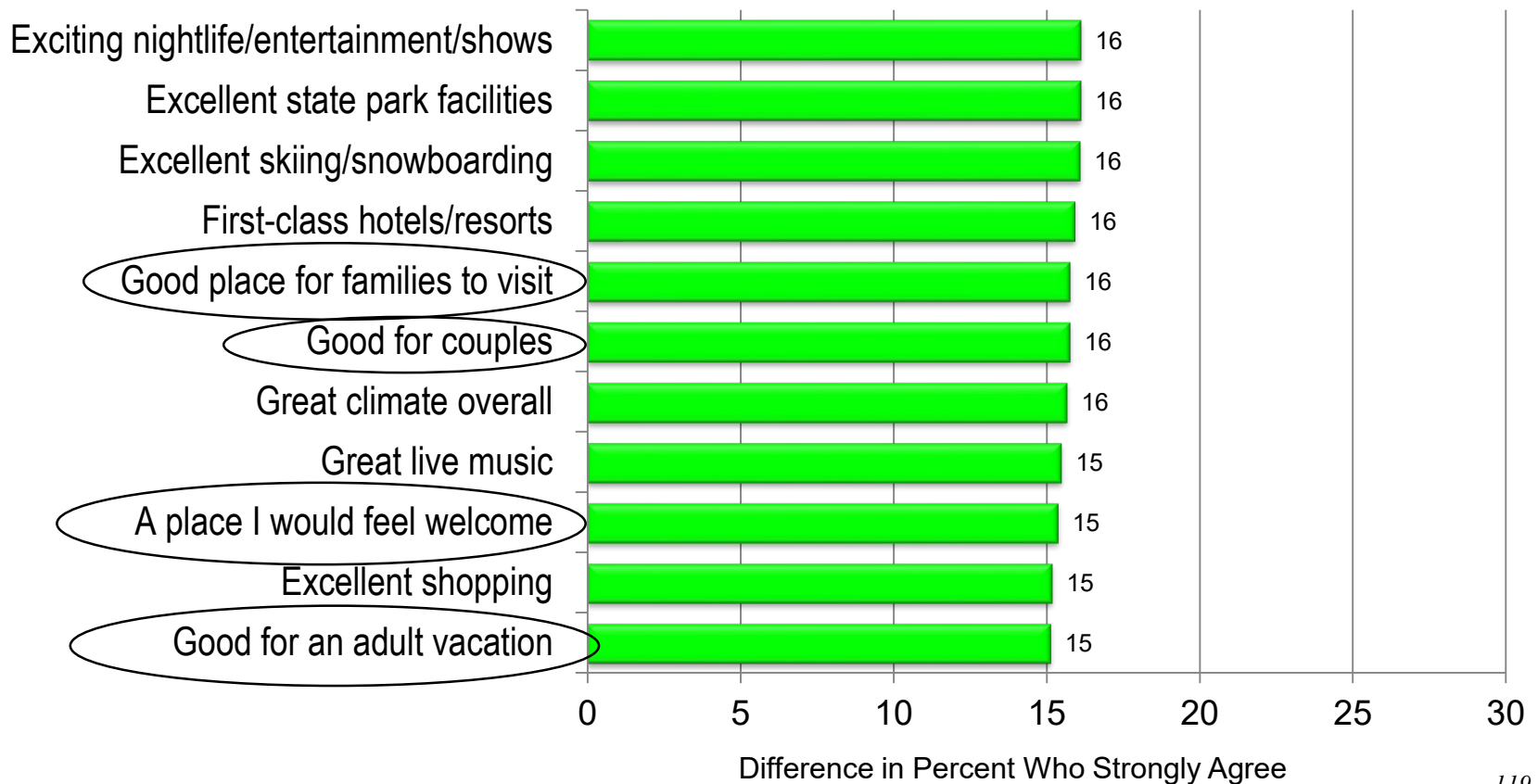


* Circled attributes are some of the most important image hot buttons for travelers

Attributes for Which the Campaign Had the Greatest Impact (Cont'd)



Base: Total Travelers

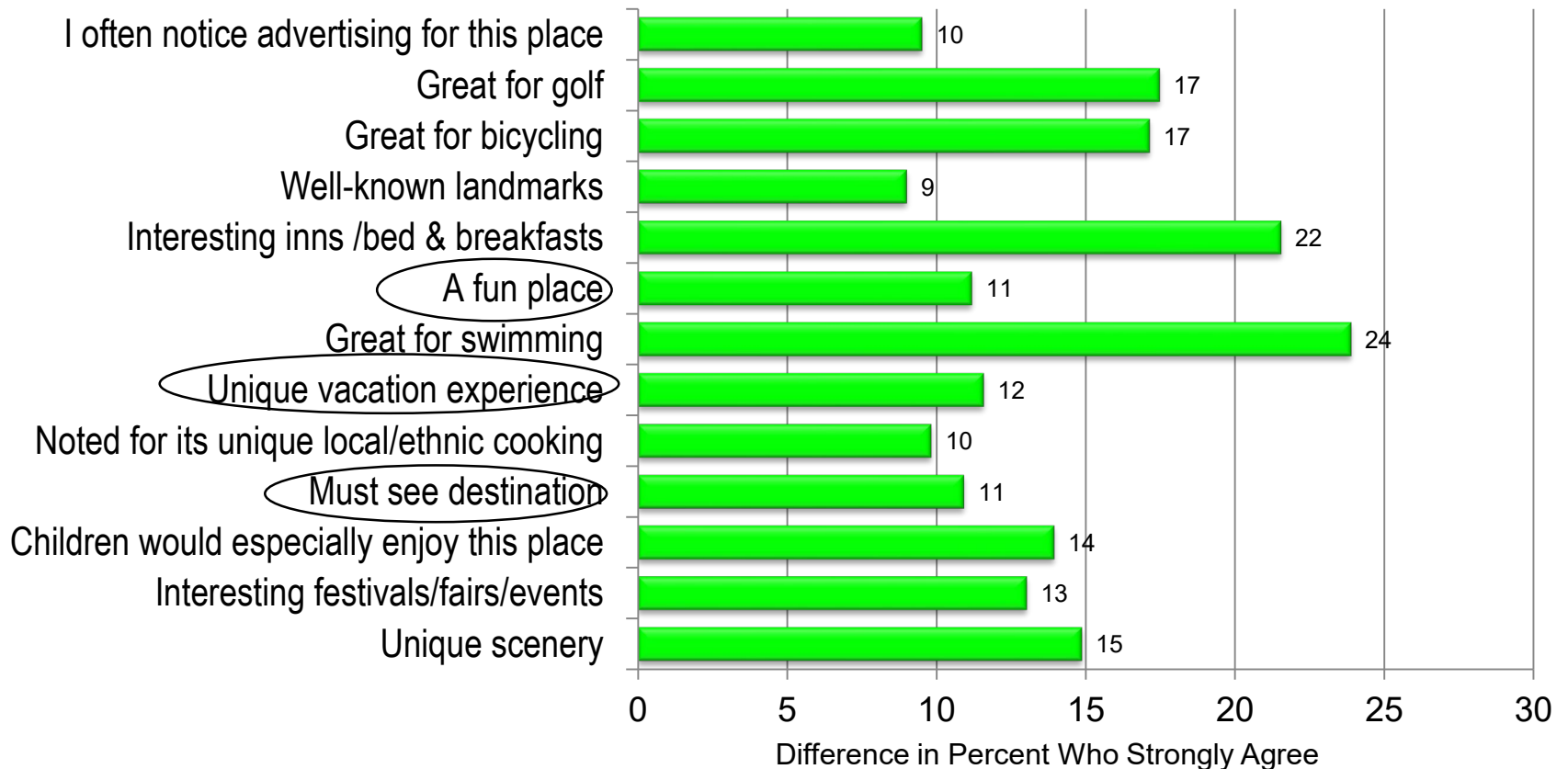


* Circled attributes are some of the most important image hot buttons for travelers

Comparison of Top Attributes – Largest Change from 2014 to FY2016



Base: Total Travelers



* Circled attributes are some of the most important image hot buttons for travelers

Short-Term Impacts of the Advertising

Short-Term Impacts of The Advertising



	FY 2016
Ad Investment*	\$1,558,446
Incremental Visits	1,239,150
Incremental Spending	\$165.3 M
State and Local Taxes	\$11.9 M
Spending ROI**	\$106
Total Tax ROI***	\$8

* Does not include spending on photography, video, website, production, and other creative.

** Incremental visitor spending per ad \$ invested.

Spending is based on \$147 per person for overnight trips and \$116 per person for day trips

*** Incremental taxes per ad \$ invested.

Tax rate was provided by West Virginia is 7.2%

Campaign Efficiency



	FY 2016
Incremental Visits	1,239,150
Ad Investment	\$1,558,446
Ad \$'s per Trip	\$1.26
Trips per Ad \$	0.8

Longer-Term Impact of Advertising – Intent to Visit West Virginia in Next 12 Months



	FY 2016
Overnight	1,964,377
Day	1,809,197
Total Potential Visits	3,773,574

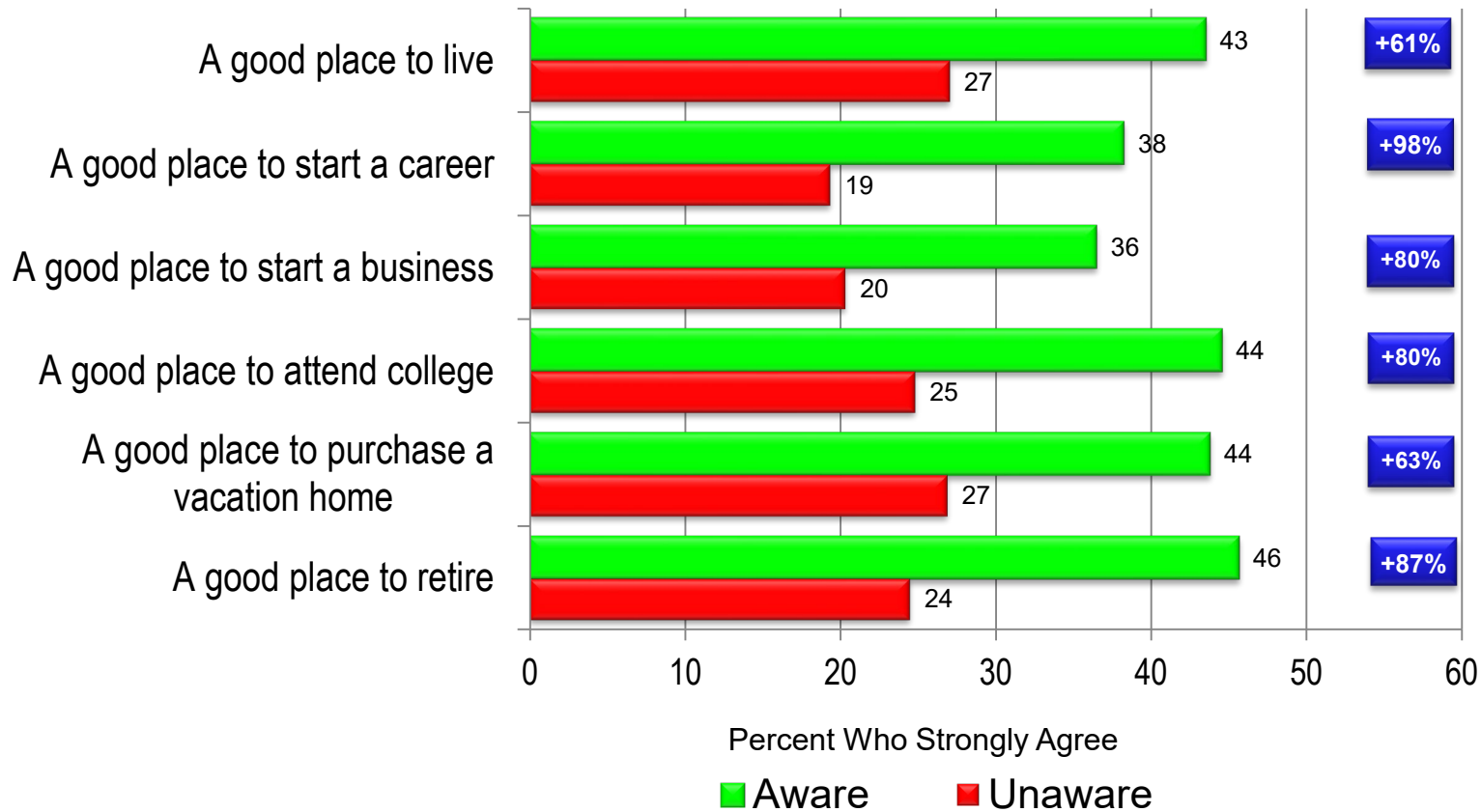
The “Halo Effect”

Economic Development
Image Ratings

Impact of West Virginia FY 2016 Tourism Campaign on State's Economic Development Image



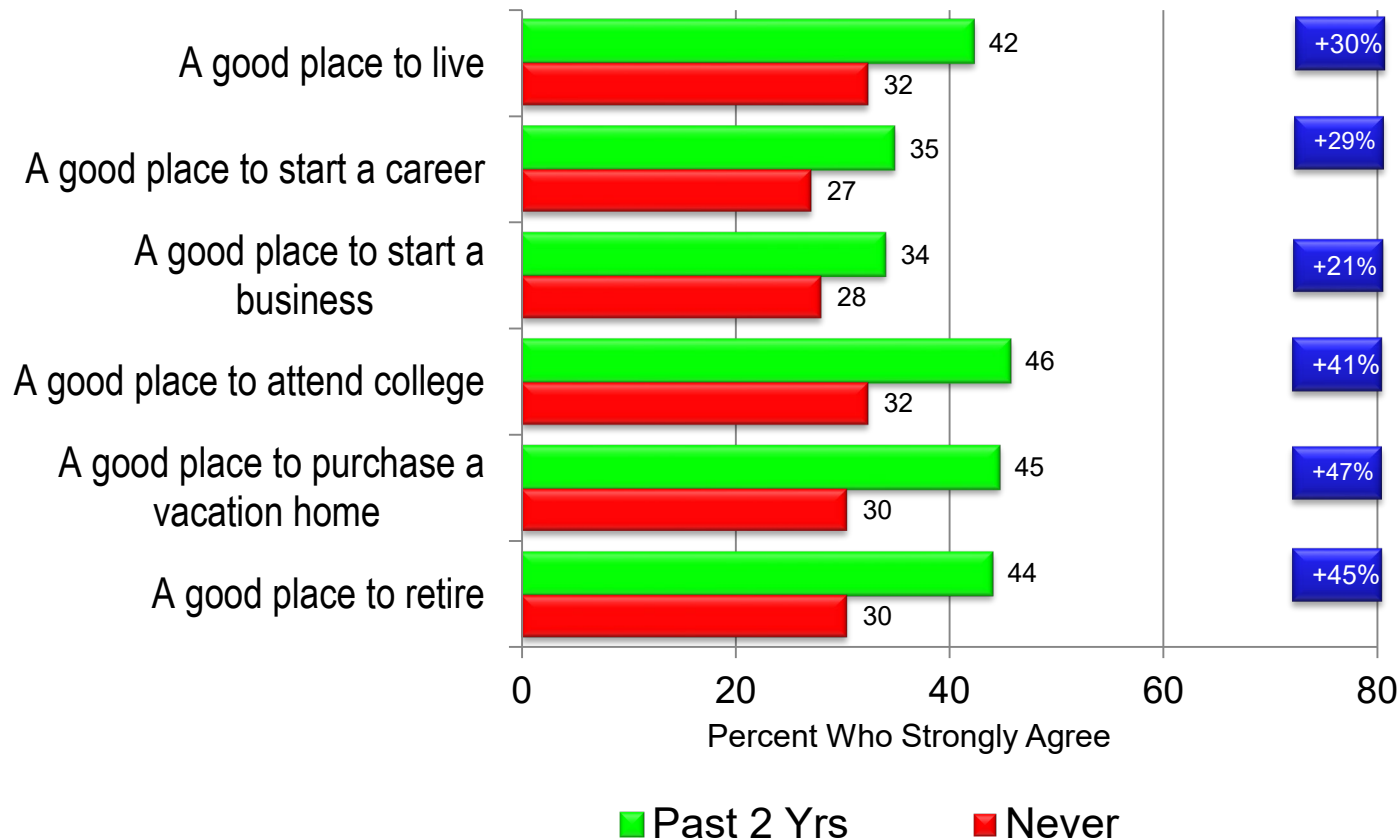
Base: Out-of-State Residents



Impact of 2016 *Visitation* on West Virginia Economic Development Image



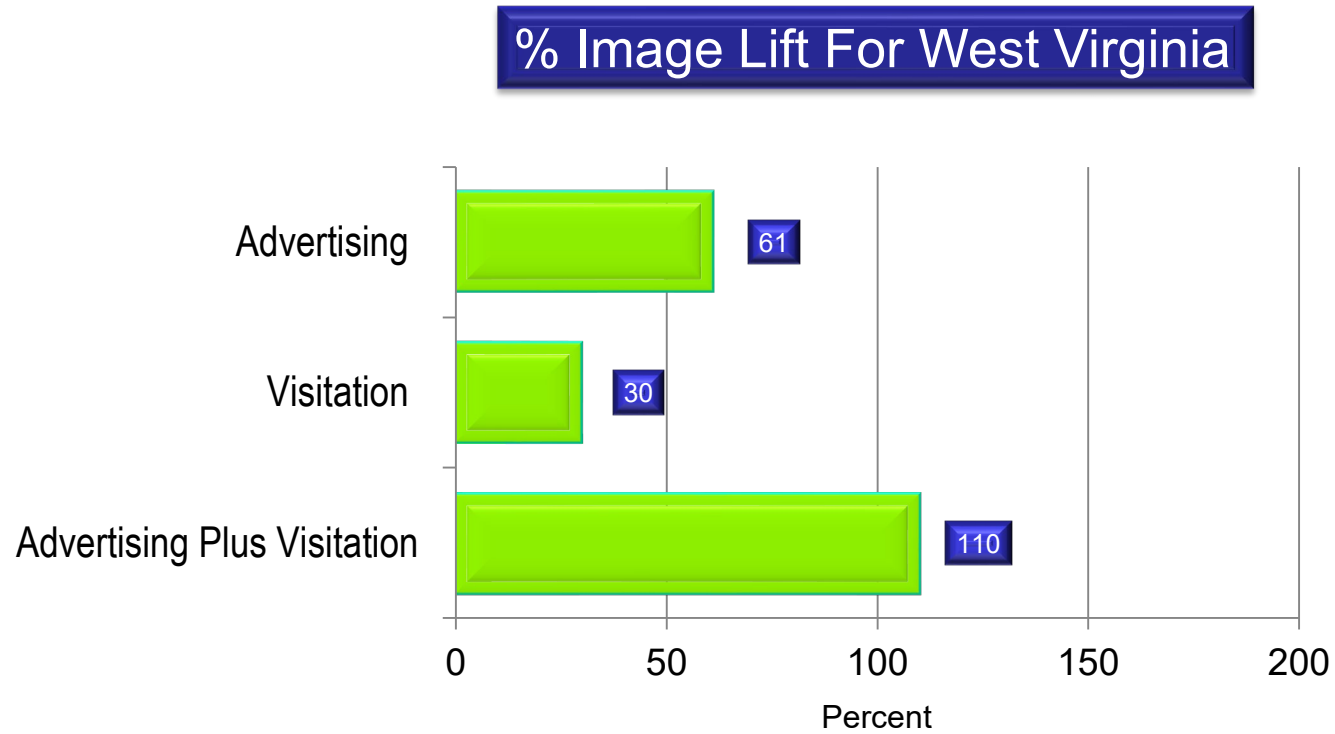
Base: Out-of-State Residents



“A Good Place to Live”



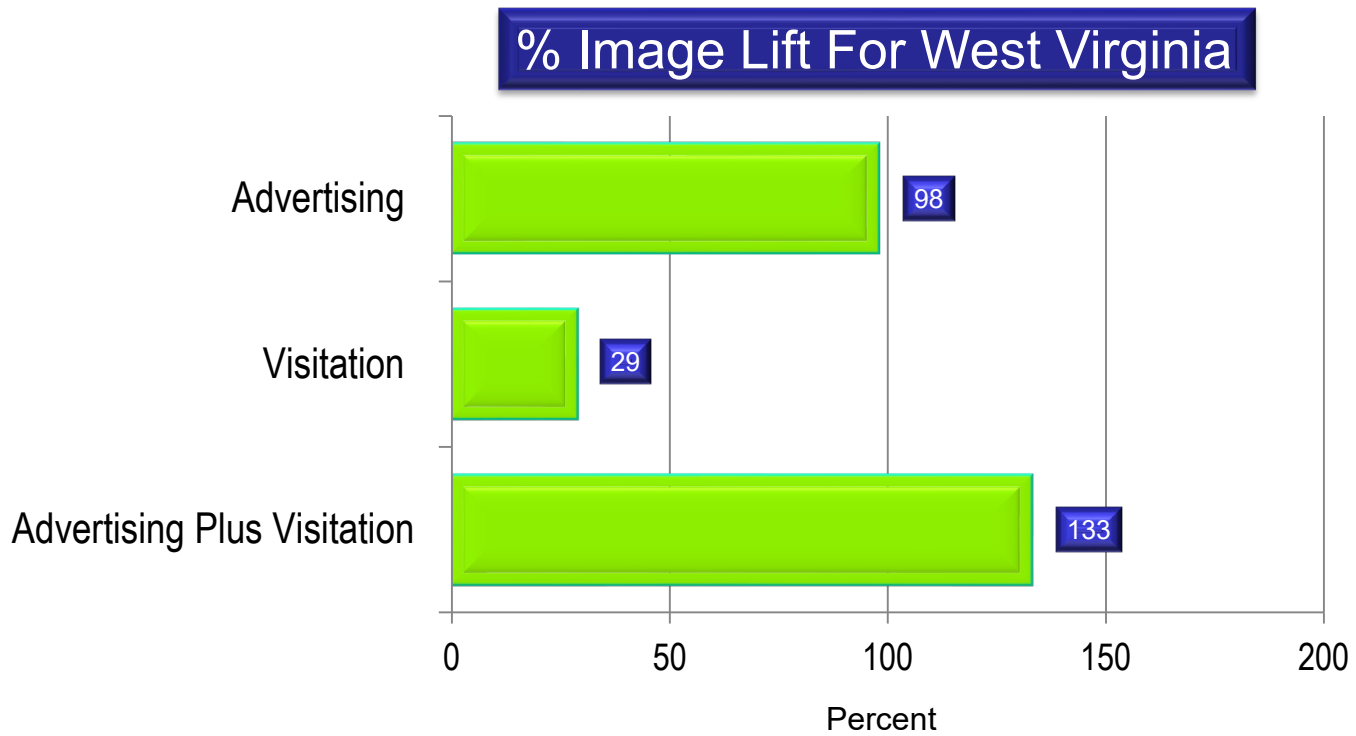
Base: Out-of-State Residents



“A Good Place to Start a Career”



Base: Out-of-State Residents

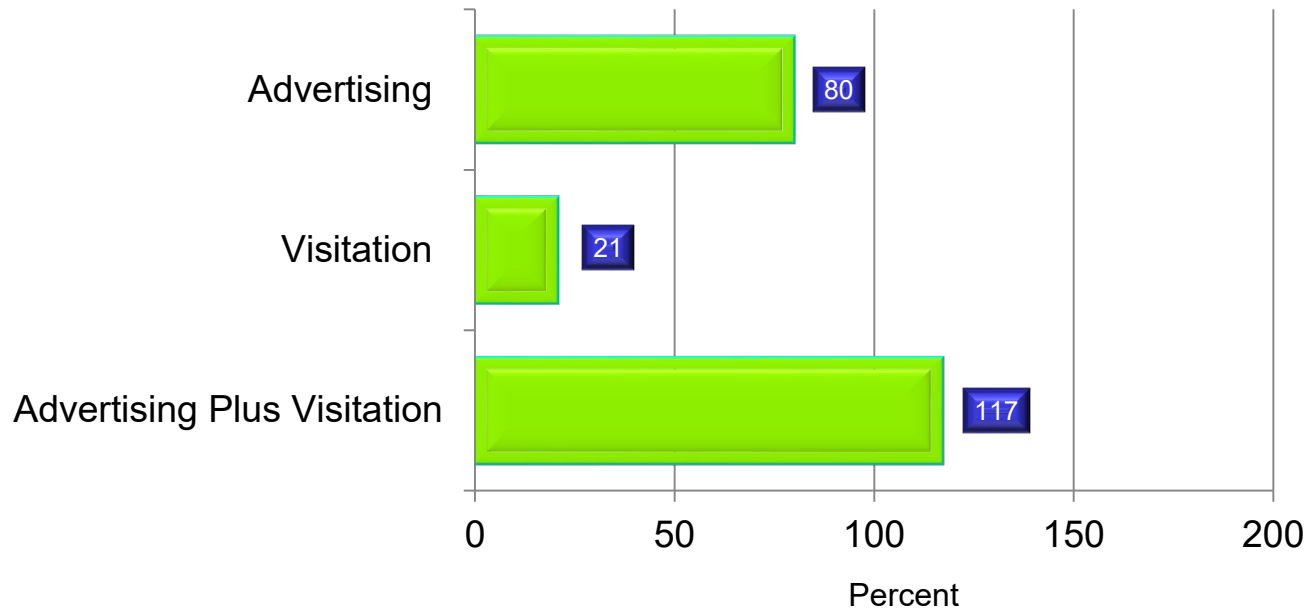


“A Good Place to Start a Business”



Base: Out-of-State Residents

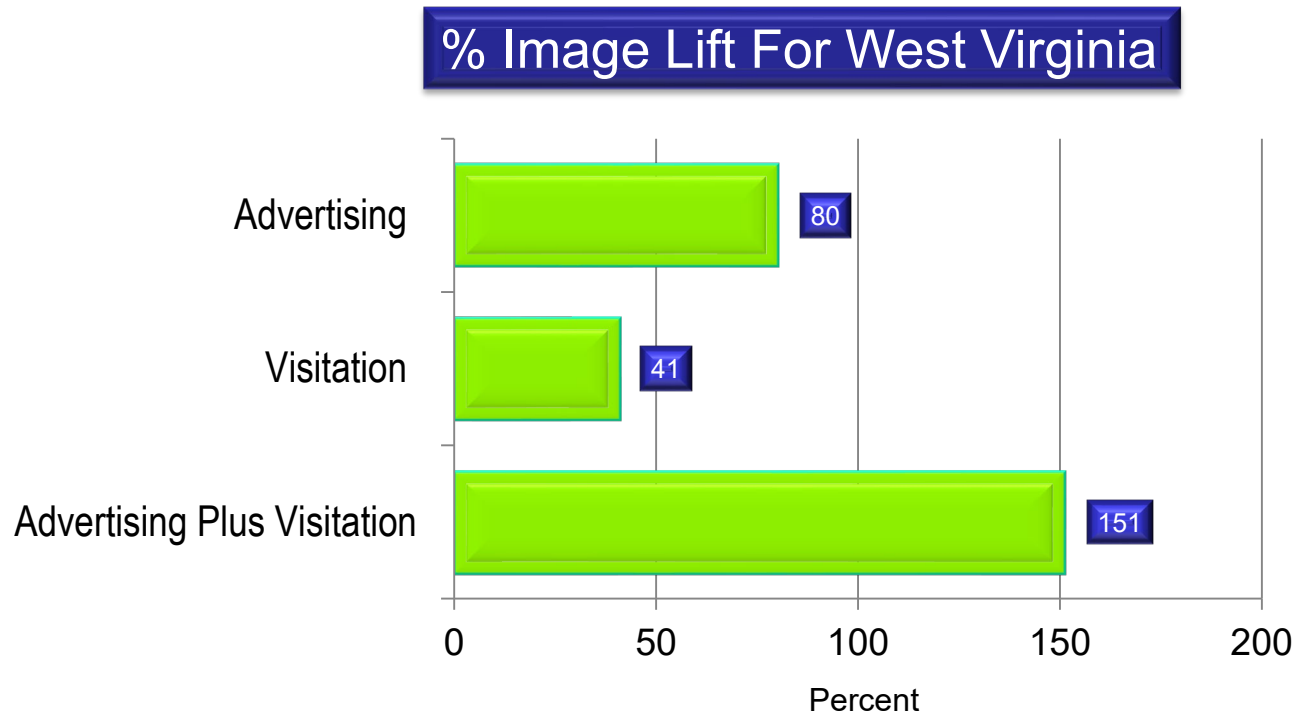
% Image Lift For West Virginia



“A Good Place to Attend College”



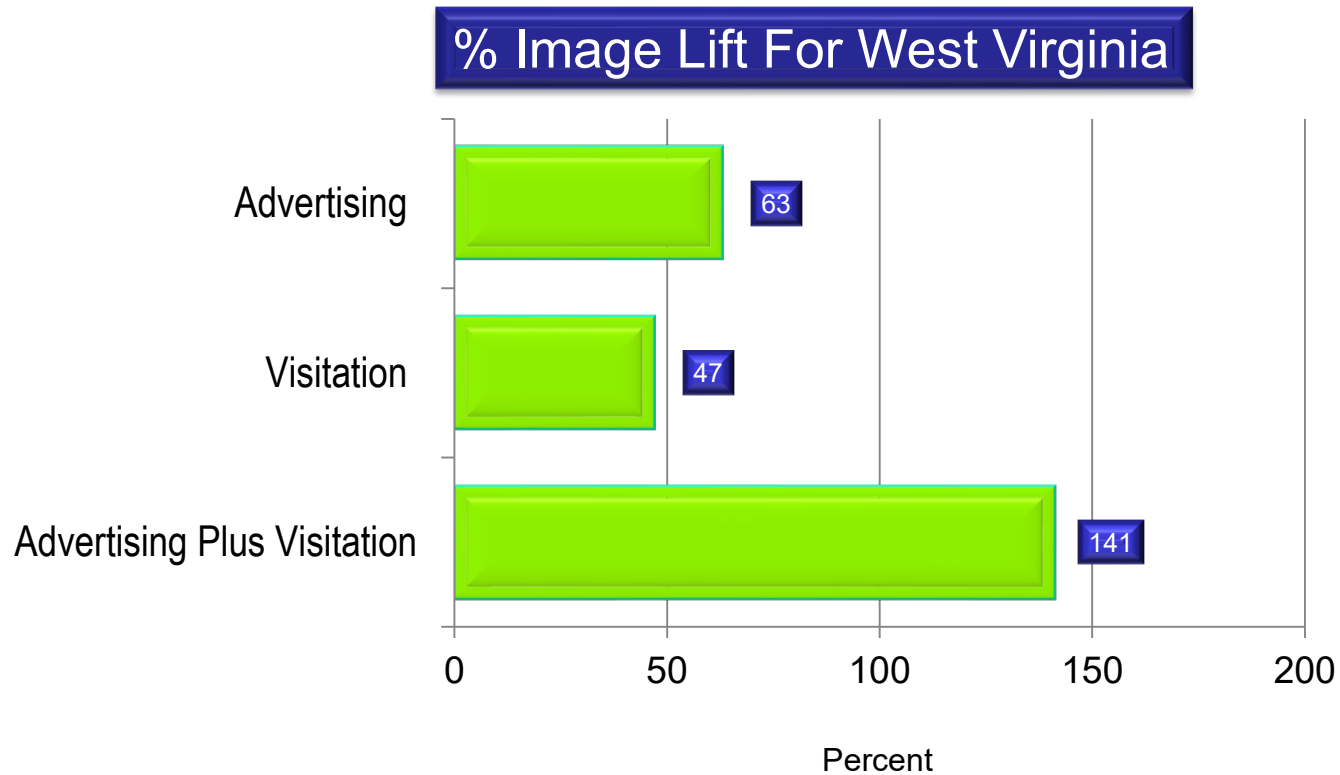
Base: Out-of-State Residents



“A Good Place to Purchase a Vacation Home”



Base: Out-of-State Residents



“A Good Place to Retire”



Base: Out-of-State Residents

