



2014 West Virginia Image & Advertising Accountability Research

November 2014

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Introduction



- ◉ Longwoods International was retained to undertake an evaluation of West Virginia's tourism advertising campaign.
- ◉ 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



- ⊙ The research was designed to provide:
 - ⊙ *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 its key competitors: Ohio, Pennsylvania, Virginia, Maryland, and North Carolina?*
 - ⊙ *A measure of both short-of-sales and bottom-line impacts of West Virginia's tourism advertising:*
 - *Awareness/recall of the 2014 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. (63% 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, and Washington, DC)
 - ◉ A total of **1,400** 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

Past and Future Visitation to West Virginia



- ◉ Half of the respondents (50%) have experienced West Virginia at least once. West Virginia visitation is below the visitation of the competitive states of Pennsylvania, Virginia, North Carolina, Maryland, and Ohio. In the past 2 years, visitation to West Virginia is only 31%. Again this level is lower than the competitive states.
- ◉ Similar to the competitive states, four in ten indicate they plan an overnight or day visit to West Virginia in the next year. West Virginia residents are twice as likely to visit West Virginia in the next year as residents of other states.

Travel Motivators



- ◉ In order to determine the key factors that motivate travel and destination of choice, respondents are asked to rate the selected states across a robust list of *attributes* or characteristics.
- ◉ Statistical correlations are then used to establish the degree of association between each attribute and the overall rating, “A place I would really enjoy visiting.”
 - ◉ *A high correlation reveals an attribute to be an important motivator. The attributes with the highest correlations are referred to as ‘Hot Buttons’.*
 - ◉ *A lower correlation reveals an attribute to be of lesser importance.*
- ◉ Using a data reduction technique, the attributes are combined into 12 different factors. The Travel Motivating *factors* are calculations that reflect the aggregated factor importance across the attributes.

Travel Motivators



- ◉ For these travelers, the top motivators for getting on the destination wish list are **excitement**, **family destination**, followed by **adult destination**:
 - ◉ *The notion of **excitement** comes from being seen as a fun, “once in a lifetime” experience and a sense of adventure*
 - ◉ ***Family destination**, including being a good place for families to visit and that children would enjoy*
 - ◉ ***Adult vacation**, the perceived suitability for couples and adults vacations*

Travel Motivators (Cont'd)



- Several factors are of moderate importance individually; but they include some of the key rational features that bring to life the emotional excitement that attracts people to a destination:
 - **Luxurious** refers to a destination's first-class hotels/resorts
 - A **worry-free** environment, because being perceived as relaxed, safe, and friendly are important
 - Being **unique** from the vacation experience, local cooking, scenery to interesting bed and breakfasts
 - Being **popular** with vacationers and being a well know destination

Travel Motivators (Cont'd)



- Relatively low on the priority list are:
 - Good **sightseeing**, particularly the overall variety of things to see and do, and the interesting arts and crafts, and well known landmarks
 - The opportunities for **entertainment**, including shopping, theater, music and nightlife
 - **Climate** overall and with a good contrast of seasons.
 - Opportunities for **sports and recreation**. It is unfortunate that this dimension is low on the priority list since this is one of West Virginia's strengths especially for exploring nature and being a good place for camping.
 - **Being affordable**, well-priced vacation options and being close by

Hot Buttons



Examining the attributes individually and comparing them to the attribute of “A place I would really enjoy visiting.” The following attributes rise to the top as important to destination choice.

- A fun place
- Good place for families to visit
- Must see destination
- Good for couples
- An exciting place
- Lots of things to see and do
- Children would especially enjoy
- Good place to relax
- A real adventure
- Unique vacation experience

West Virginia's Image vs. Competitors



- ◉ In comparison to the major competitors evaluated in this study, West Virginia's overall level of appeal:
 - ◉ *lags significantly behind North Carolina and Virginia and slightly below Maryland and Pennsylvania*
 - ◉ *but is ahead of Ohio*
- ◉ As an exception, West Virginia is perceived similarly to North Carolina and Virginia as a **Sports and Recreation** destination and better than all other states.

West Virginia's Image vs. Competitors (Cont'd)



- ◉ West Virginia's image strengths versus these competitors as a group are:
 - ◉ *Known for beautiful mountains*
 - ◉ *Great for white water rafting*
 - ◉ *Excellent hunting*
 - ◉ *Great for hiking/backpacking*
 - ◉ *Great for exploring nature*
 - ◉ *Good place for camping*
 - ◉ *Great for canoeing/kayaking*
 - ◉ *Excellent skiing/snowboarding*
- ◉ None of these attributes are considered important to destination choice in West Virginia's advertised markets.

West Virginia's Image



- Travelers perceive some significant disadvantages to visiting West Virginia relative to the competition:
 - *Well-known landmarks*
 - *Variety of dining options*
 - *Excellent shopping*
 - *First-class hotels/resorts*
 - *Exciting nightlife/ entertainment/ shows*
 - *Well-known destination*
 - ***Lots to see and do***
 - *Great for theater and the performing arts*
 - *Popular with vacationers*
 - *Great for swimming*
 - *Great for golf*
 - ***Children would especially enjoy***
 - ***An exciting place***

Image of West Virginia vs. Ohio



West Virginia Better For...

- ◉ *Known for beautiful mountains*
- ◉ *Great for white water rafting*
- ◉ *Great for hiking/backpacking*
- ◉ *Great for exploring nature*
- ◉ *Good place for camping*
- ◉ *Truly beautiful scenery*
- ◉ *Excellent hunting*
- ◉ *Unique scenery*
- ◉ *Great for canoeing/kayaking*
- ◉ *Excellent skiing/snowboarding*
- ◉ *Good trail system*
- ◉ ***A real adventure***
- ◉ ***Good place to relax***

Ohio Better For...

- ◉ *Excellent shopping*
- ◉ *Variety of dining options*
- ◉ *Exciting nightlife/ entertainment/ shows*

Image of West Virginia vs. Pennsylvania



West Virginia Better For...

- ◉ *Known for beautiful mountains*
- ◉ *Great for white water rafting*
- ◉ *Great for hiking/backpacking*
- ◉ *Great for exploring nature*
- ◉ *Excellent hunting*
- ◉ *Great for canoeing/kayaking*
- ◉ *Known for pristine water*
- ◉ *Good place for camping*
- ◉ *Warm, friendly people*
- ◉ ***A real adventure***

Pennsylvania Better For...

- ◉ *Well-known landmarks*
- ◉ *Variety of dining options*
- ◉ *Great for theater and the performing arts*
- ◉ ***Lots to see and do***
- ◉ *Excellent shopping*
- ◉ *Interesting antiques/arts/crafts*
- ◉ *Exciting nightlife/ entertainment/ shows*
- ◉ ***Children would especially enjoy***
- ◉ *Well-known destination*
- ◉ *First class hotels/resorts*
- ◉ ***An exciting place***

Image of West Virginia vs. Virginia



West Virginia Better For...

- ◉ *Known for beautiful mountains*
- ◉ *Great for white water rafting*
- ◉ *Excellent skiing/snowboarding*
- ◉ *Excellent hunting*

Virginia Better For...

- ◉ *First class hotels/resorts*
- ◉ *Well-known destination*
- ◉ *Variety of dining options*
- ◉ *Well-known landmarks*
- ◉ *Popular with vacationers*
- ◉ ***Lots to see and do***
- ◉ ***Good place for families to visit***
- ◉ *Great for swimming*
- ◉ *Excellent shopping*
- ◉ *Exciting nightlife/ entertainment/ shows*
- ◉ ***An exciting place***
- ◉ ***Children would especially enjoy***
- ◉ *Great for theater and the performing arts*
- ◉ ***Good for couples***

Image of West Virginia vs. Maryland



West Virginia Better For...

- ◉ *Known for beautiful mountains*
- ◉ *Excellent hunting*
- ◉ *Great for white water rafting*
- ◉ *Great for hiking/backpacking*
- ◉ *Great for exploring nature*
- ◉ *Good place for camping*
- ◉ *Great for canoeing/kayaking*
- ◉ *Good trail system*
- ◉ *Truly beautiful scenery*
- ◉ *Excellent skiing/snowboarding*
- ◉ *Affordable accommodations*
- ◉ ***A real adventure***
- ◉ *Unique scenery*
- ◉ *Warm, friendly people*

Maryland Better For...

- ◉ *Variety of dining options*
- ◉ *Exciting nightlife/ entertainment/ shows*
- ◉ *Well-known landmarks*
- ◉ *Excellent shopping*
- ◉ *First class hotels/resorts*
- ◉ *Great for theater and the performing arts*
- ◉ *Well-known destination*
- ◉ *Popular with vacationers*
- ◉ ***Lots to see and do***
- ◉ *Unique local/ethnic cooking*
- ◉ *Great for swimming*
- ◉ ***Children would especially enjoy***
- ◉ ***An exciting place***
- ◉ *Great for golf*

Image of West Virginia vs. North Carolina



West Virginia Better For...

- ◉ *Known for beautiful mountains*
- ◉ *Great for white water rafting*
- ◉ *Excellent hunting*
- ◉ *A good contrast of seasons*
- ◉ *Excellent skiing/snowboarding*

North Carolina Better For...

- ◉ *Popular with vacationers*
- ◉ *Great for swimming*
- ◉ *Great for golf*
- ◉ *Well-known destination*
- ◉ ***Good place for families to visit***
- ◉ *Excellent shopping*
- ◉ ***A fun place***
- ◉ *First class hotels/resorts*
- ◉ *Great climate overall*
- ◉ *Exciting nightlife/ entertainment/ shows*
- ◉ ***Lots to see and do***
- ◉ ***An exciting place***
- ◉ *Good vacation packages*
- ◉ ***Good for couples***

West Virginia's Product Delivery



- ◉ The image ratings we just discussed looked at perceptions of West Virginia and the competition among the broad population of potential travelers. Within that broad population there are people who have visited West Virginia in the recent past, i.e. who have experienced West Virginia's product, and some who have not.
- ◉ The analysis that follows examines recent visitors' image of West Virginia based on recent experience ("product delivery") compared to the image ratings of those who have never actually visited, i.e., whose perceptions are based on "pure image".
- ◉ This is essentially the difference between the expectations of those who have not been to West Virginia vs. the experiences of those who have. When the experience falls short of expectations, there may be a problem with the product. When experience exceeds expectations, there is a great opportunity to educate those who do not know how wonderful West Virginia is.

Product Delivery Impacts



- ⦿ As expected, the image ratings for West Virginia are much higher among West Virginia visitors on all dimensions as compared to those who have not visited.
- ⦿ Past experience strongly influences the perception of West Virginia as being **exciting**, a **family destination**, a **adult destination**, being **worry free**, great **sightseeing**, having a good **climate**, excellent **sports & recreation**, and **being affordable**.
- ⦿ Hot Buttons notably impacted by experience are:
 - ⦿ *Good place to relax*
 - ⦿ *Good place for families to visit*
 - ⦿ *An exciting place*
 - ⦿ *Good for couples*
 - ⦿ *Being a must see destination*
 - ⦿ *Provides an unique vacation experience*
 - ⦿ *Being a real adventure*
 - ⦿ *Being a fun place*

Advertising Awareness and Impact on Visitation



- ◉ Fifty-nine (59%) of the respondents are aware of the West Virginia advertising. West Virginia ad awareness is highest in West Virginia, Kentucky, and Maryland.
- ◉ The advertising in magazine and online advertising formats have similar awareness levels (47% and 43% respectively) with television lower (34%), and radio much lower (18%).
- ◉ The impact on visits to West Virginia is slowing with increased advertising frequency.

Advertising Image Impacts



- ◉ The advertising has had only a modest impact on West Virginia's image as a travel destination. Across virtually all dimensions, respondents who recalled seeing the advertising rated the West Virginia only modestly higher to those respondents who did not recall seeing the advertising. Typically, there is a larger difference.
- ◉ The campaign had highest improvement to the perception of West Virginia as being **popular**, **exciting** and **unique**.
- ◉ The Hot Button notably impacted by the advertising is:
 - ◉ *A fun place*

Advertising Financials



- ◉ With an investment of \$1,876,667, the 2014 campaign generated an awareness level of 59%.
- ◉ Bottom-line results included:
 - ◉ *1,500,486 incremental visits to the state that would not have occurred without the advertising*
 - ◉ *\$181 million in incremental visitor spending*
 - ◉ *\$13 million in incremental state and local taxes*
- ◉ Looking at it in another way, every dollar spent on the 2014 campaign generated \$96 in incremental spending in West Virginia and \$7 in additional tax dollars.
- ◉ Campaign efficiency is good with every dollar invested in travel marketing generated 0.8 trips in 2014.

Conclusions and Recommendations

Conclusions and Recommendations



- ◉ Many of West Virginia's image strengths are outdoor attributes such as ***known for beautiful mountains, great for white water rafting, excellent hunting, great for hiking/backpacking, and great for exploring nature.***
- ◉ When taken individually, these attributes are relatively unimportant in terms of driving interest in destination selection.
- ◉ West Virginia's image is stronger than Ohio. However compared to North Carolina and Virginia, the image perception is much lower. These stronger destinations should be kept in mind when developing the messaging.

Conclusions and Recommendations



- ◉ Longwoods believes these image perceptions can be corrected in advertising, especially when focusing on the Hot Buttons of:
 - ◉ *Lots of things to see and do*
 - ◉ *Children would especially enjoy*
 - ◉ *An exciting place*

Conclusions and Recommendations



- Travel motivator ratings from people who have visited in the past 2 years are better than those who have not experienced West Virginia. As a result, tactics to build trial for the West Virginia destination should be considered.
- This is especially true among the factors of **worry free, sports & recreation, being affordable, and climate**. When travelers experienced the destination, they rate West Virginia higher.

Conclusions and Recommendations



- ◉ Image ratings among those aware of the advertising are only slightly higher to those who have not seen the advertising.
- ◉ It would appear that travelers are not learning anything new from the advertising.
- ◉ The slowing of the impact on visits to West Virginia with increased advertising frequency is expected to some degree. However, the rate of change seen in this research is lower than expected and may be an indication that the current campaign may be reaching the end of its effectiveness.

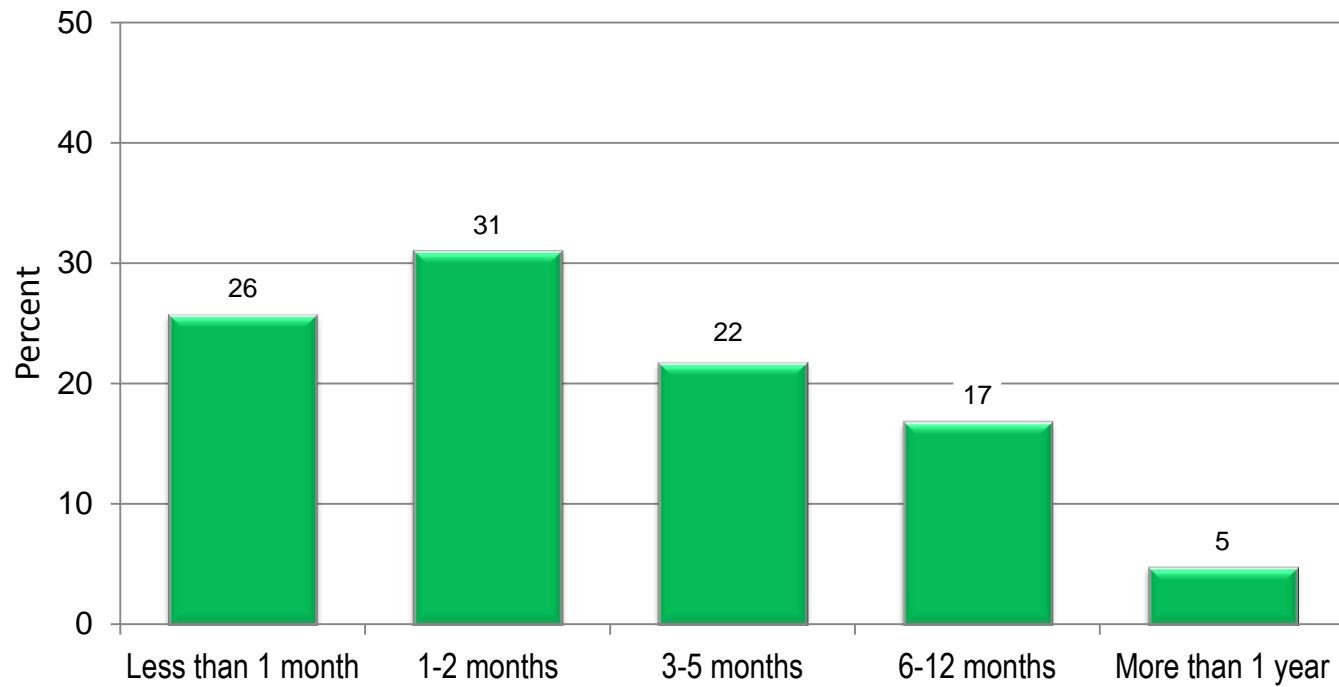
Conclusions and Recommendations



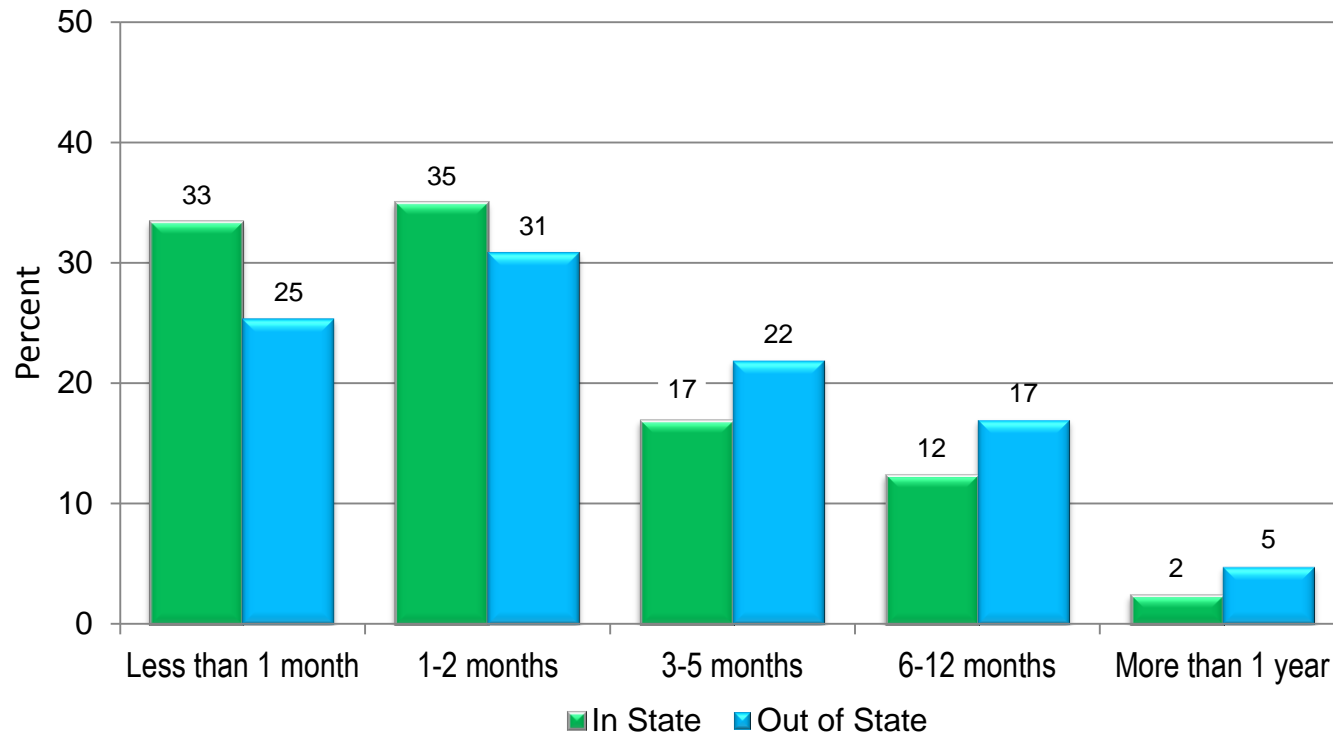
- ◉ It appears that Magazine and Online placements worked harder for West Virginia than Radio. Some consideration should be given to shifting some of the media dollars to the media that works harder.
- ◉ West Virginia has a good performance on their return on investment at \$7 for every marketing dollar invested.
- ◉ Increased spending may not yield the same ratio, but it should increase the tax dollars generated if the advertising is on strategy.

Trip Planning

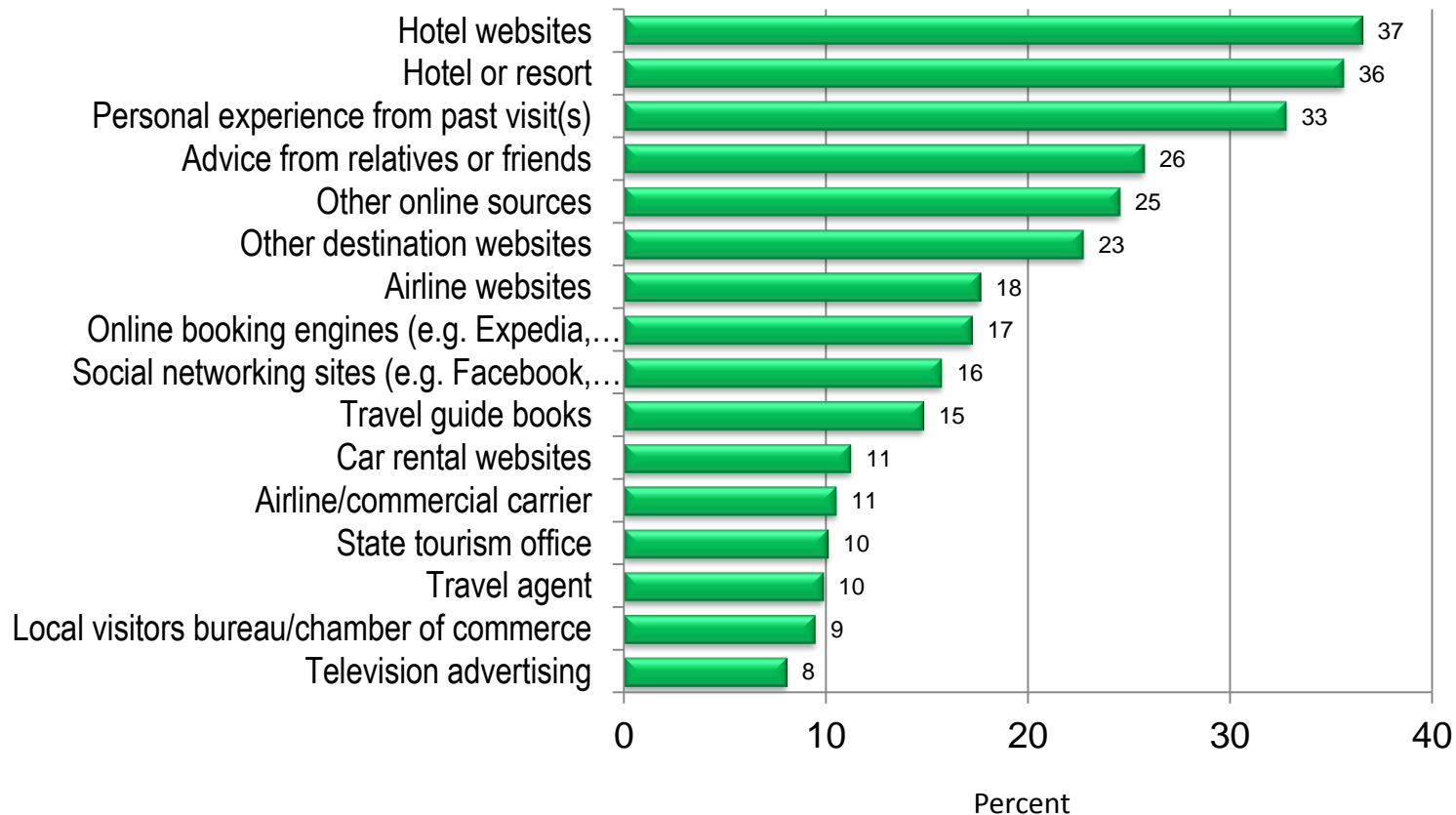
Planning Cycle



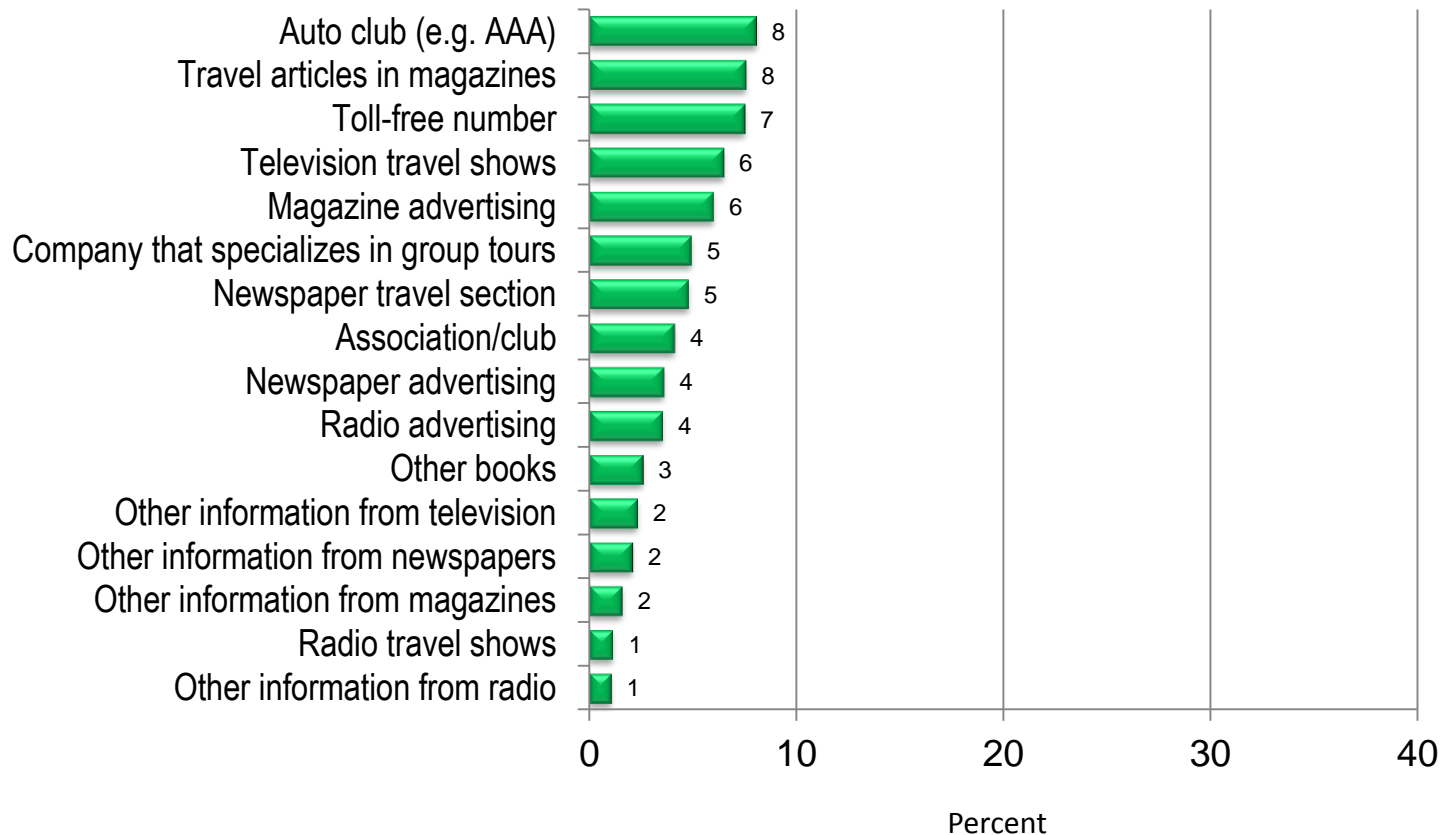
Planning Cycle – In State vs. Out of State



Information Sources Used for Planning



Information Sources Used for Planning (Cont'd)

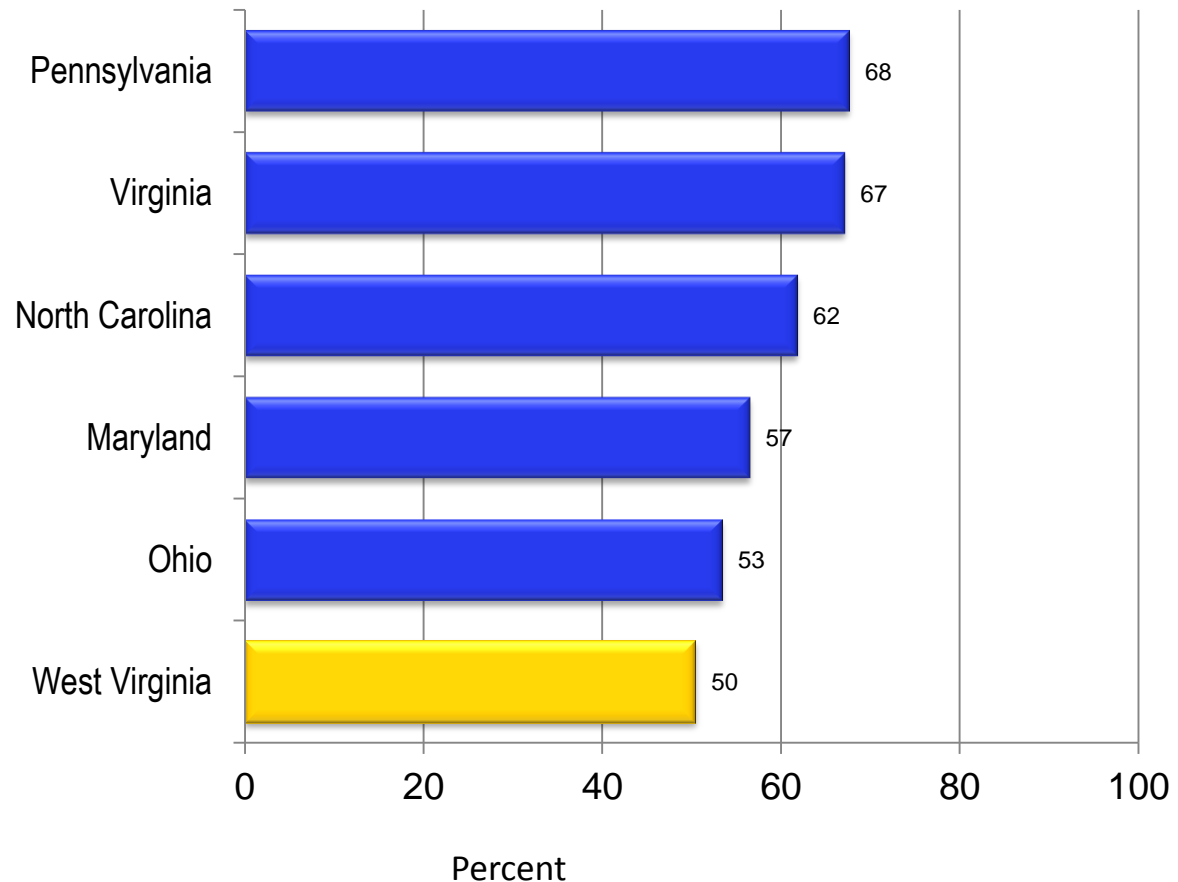


Destination Past Visitation & Interest

Ever Visited — Day/Overnight Trip



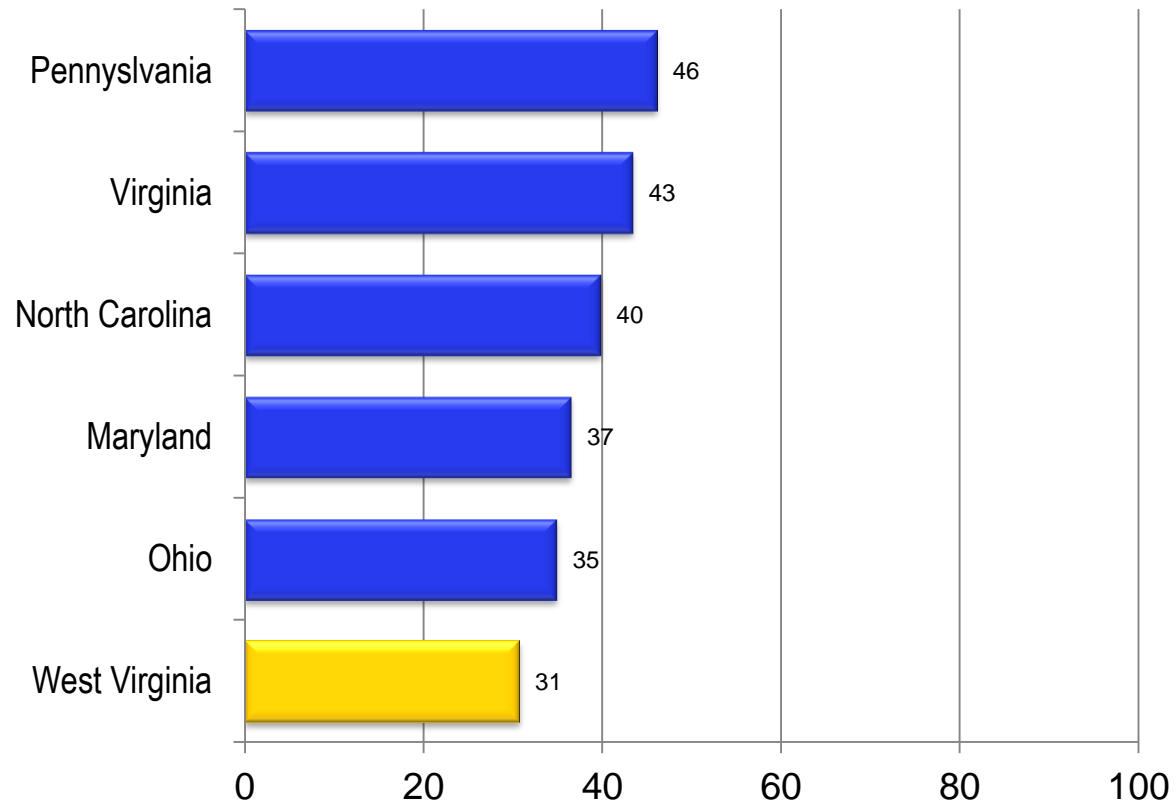
Base: Those who have ever visited on a day or overnight trip



Past 2 Years— Day/Overnight Trip



Base: Those who have ever visited on a day or overnight trip for each state

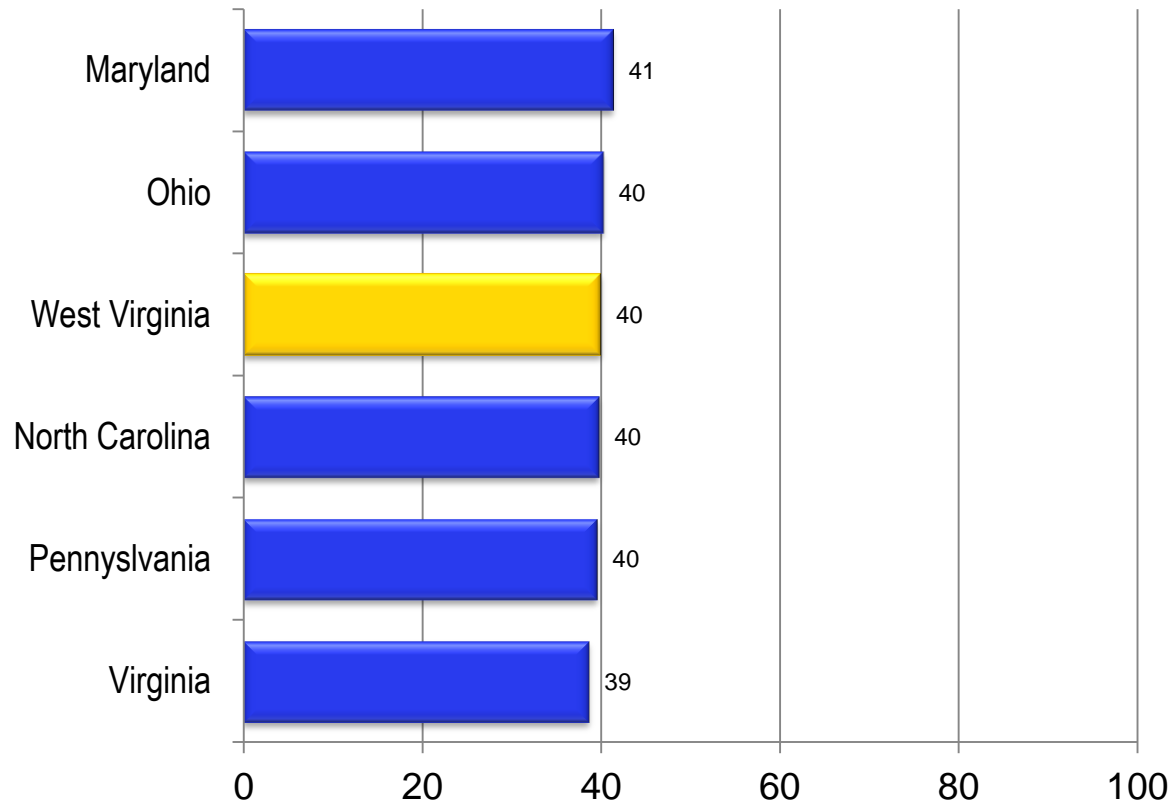


Percent Who Strongly Agree

Intent to Visit in the Next Year



Base: Those who have ever visited on a day or overnight trip

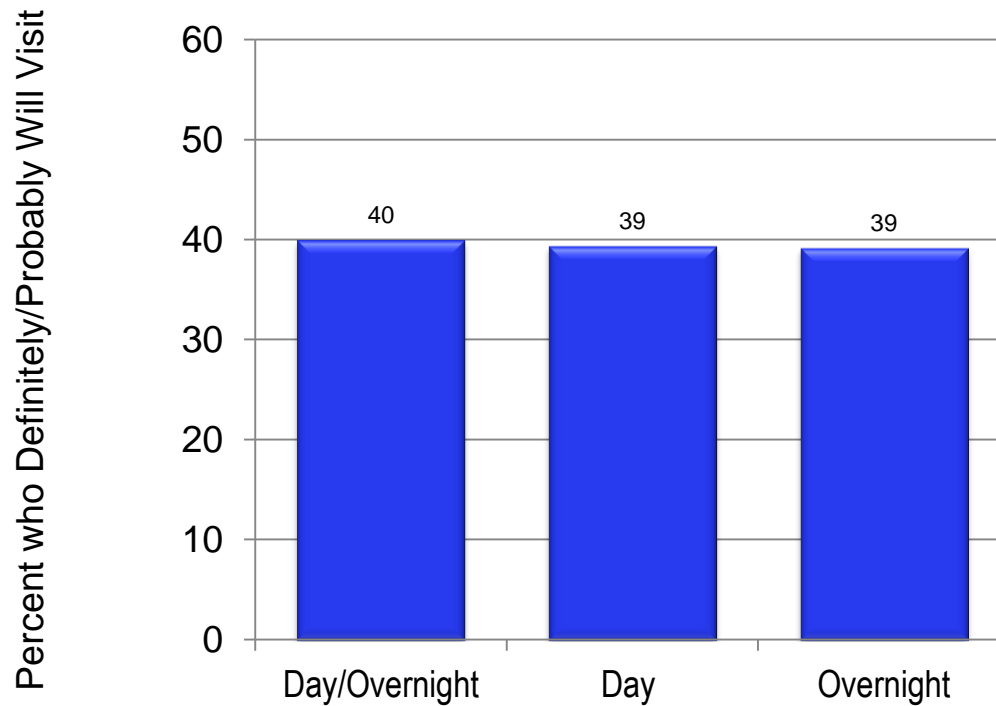


Percent who Definitely/Probably Will Visit

Intent to Visit West Virginia in the Next Year



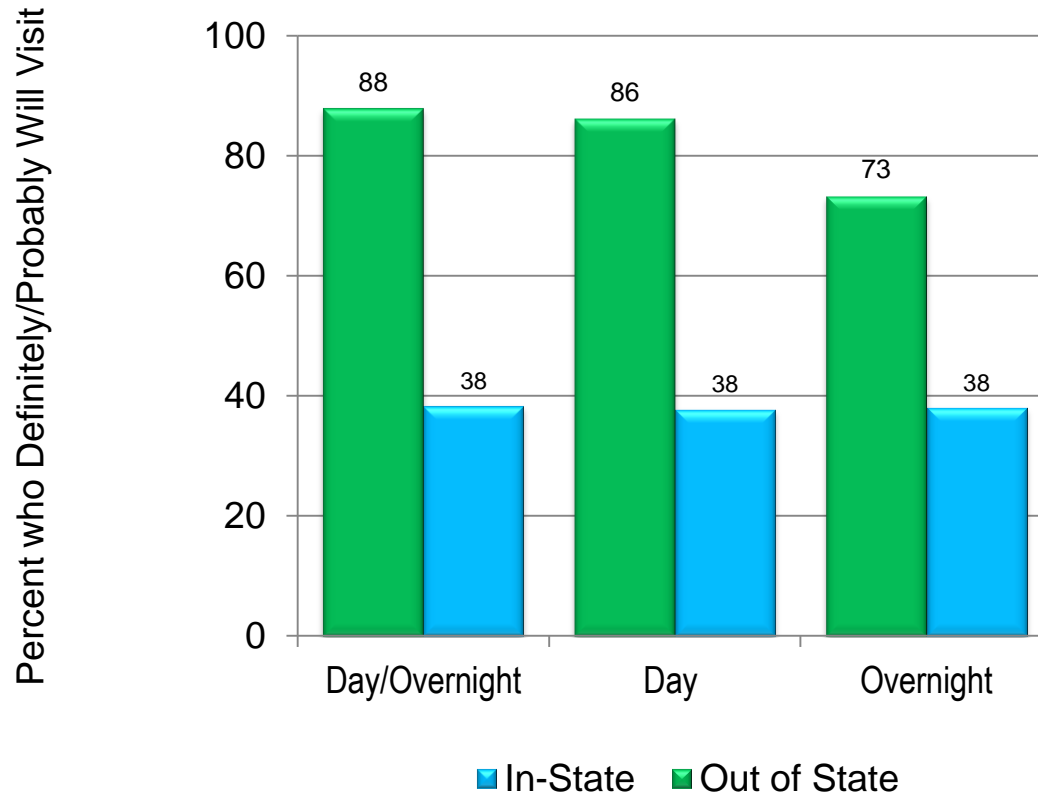
Base: Those who have ever visited on a day or overnight trip



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

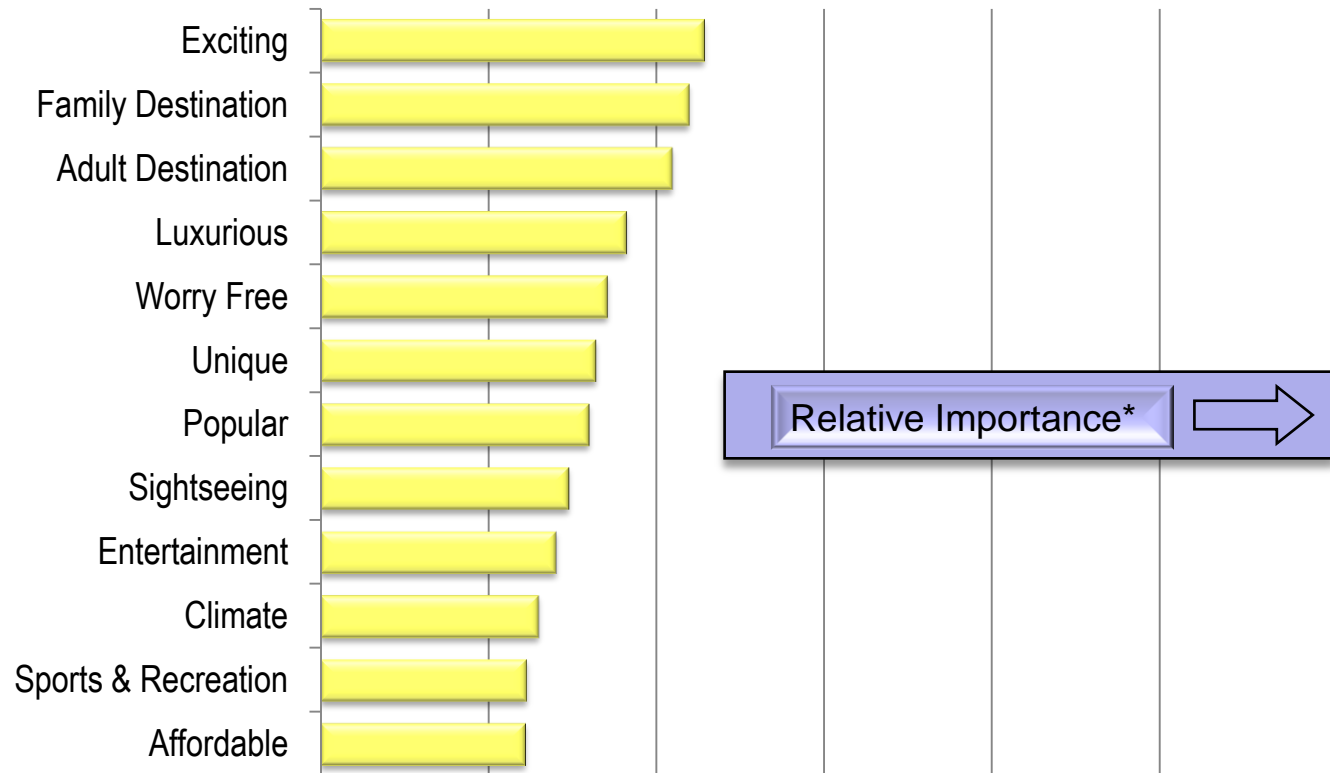


Base: Those who have ever visited on a day or overnight trip



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."

Hot Buttons



| Top 10 Hot Buttons |
|----------------------------------|
| A fun place |
| Good place for families to visit |
| Must see destination |
| Good for couples |
| An exciting place |
| Lots of things to see and do |
| Children would especially enjoy |
| Good place to relax |
| A real adventure |
| Unique vacation experience |

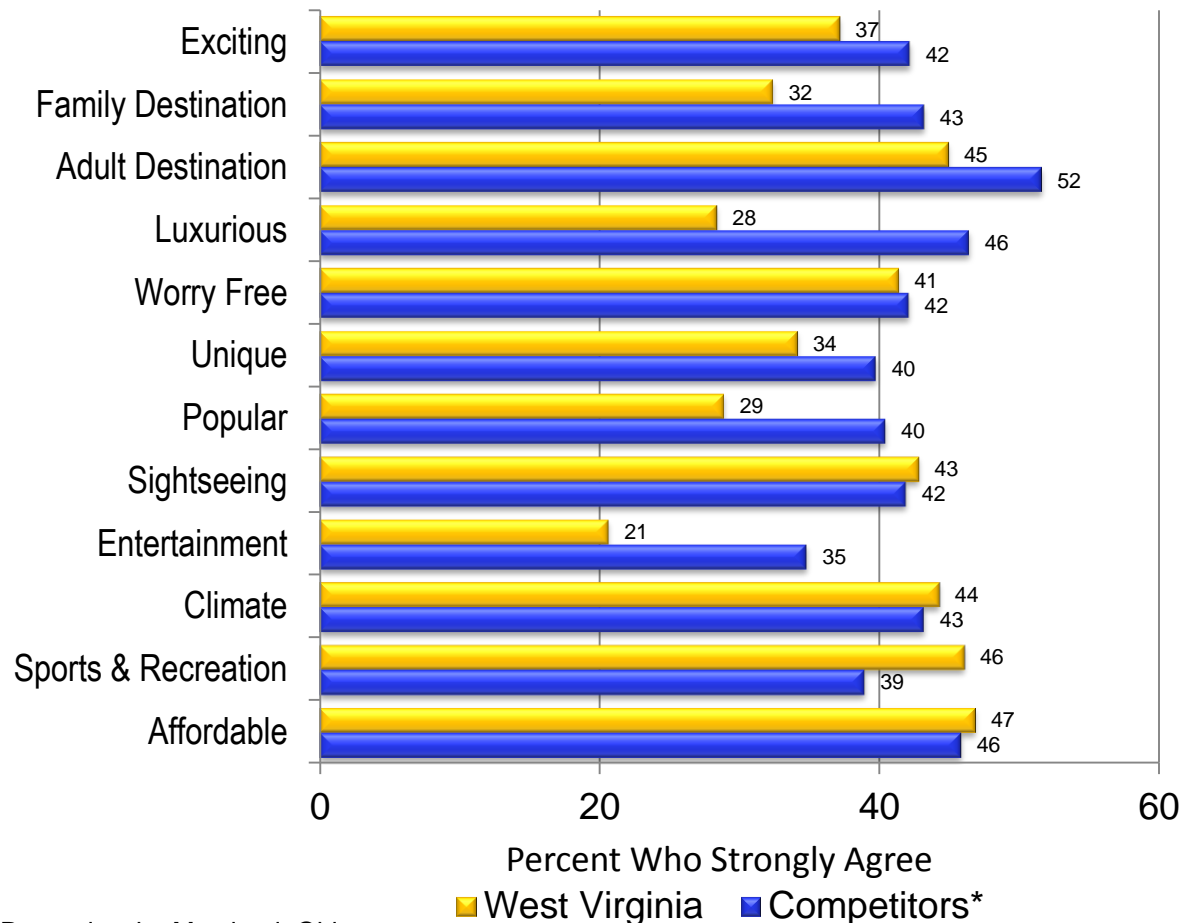
West Virginia's Image vs. the Competition

West Virginia's Image vs. Competitors



Base: Total Travelers

Relative Importance*

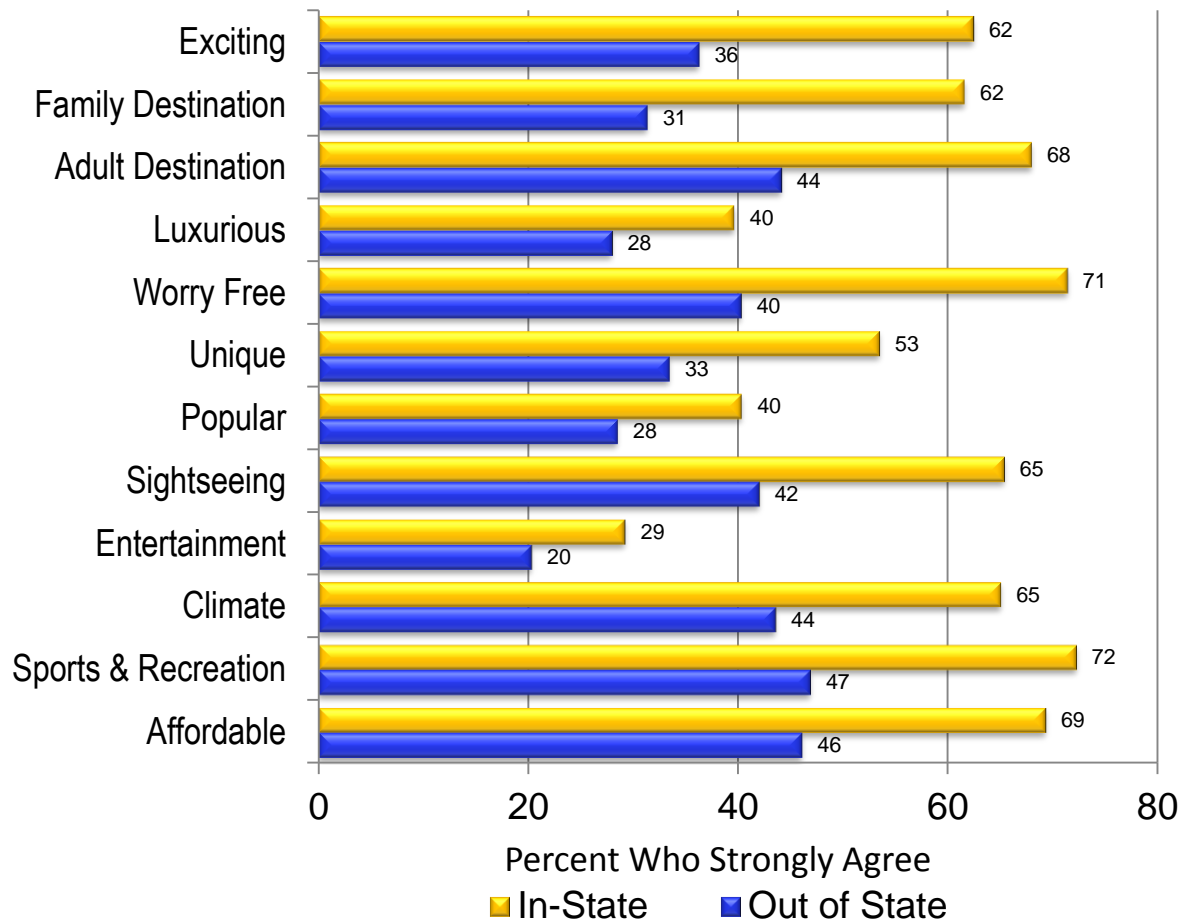


* Competitors: North Carolina, Virginia, Pennsylvania, Maryland, Ohio

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



Base: Total Travelers



West Virginia Image vs. Competitors — Exciting



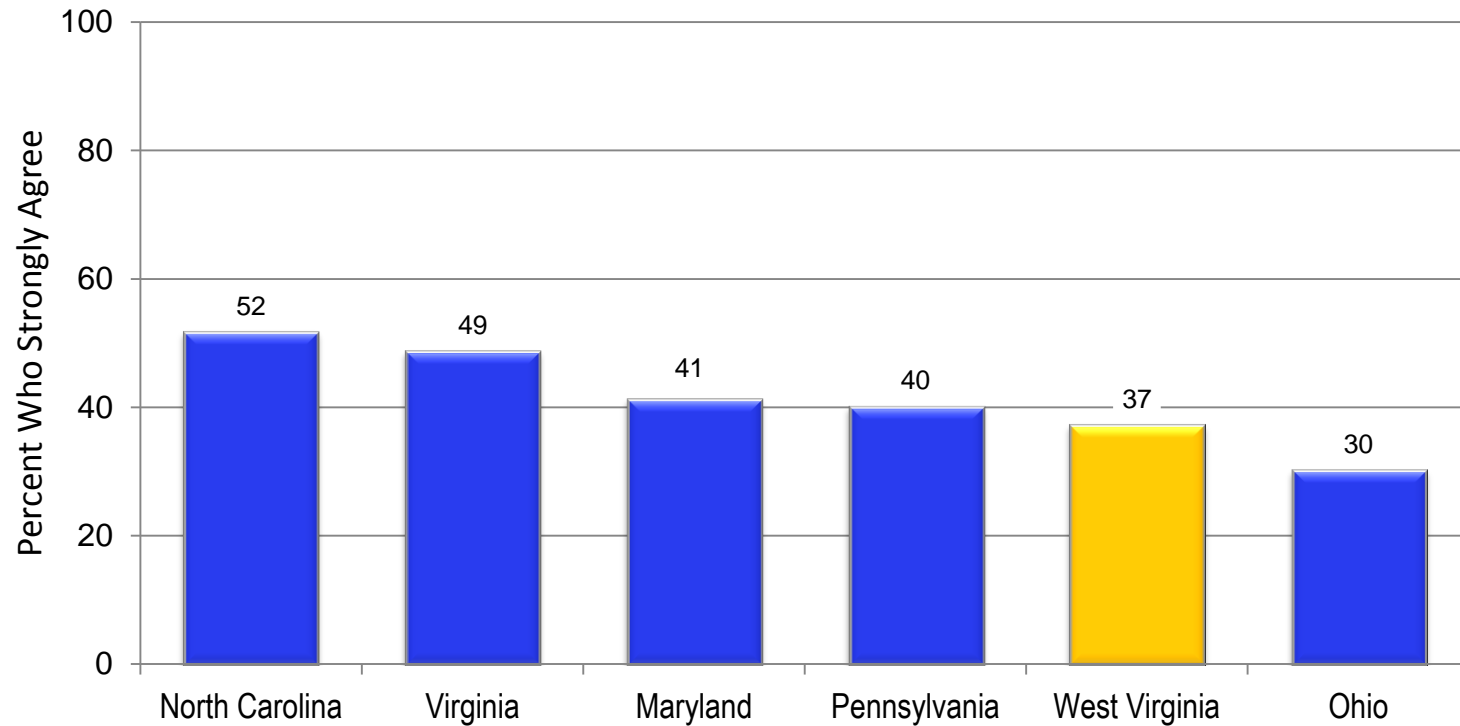
Base: Total Travelers



West Virginia Image vs. Competitors — Exciting



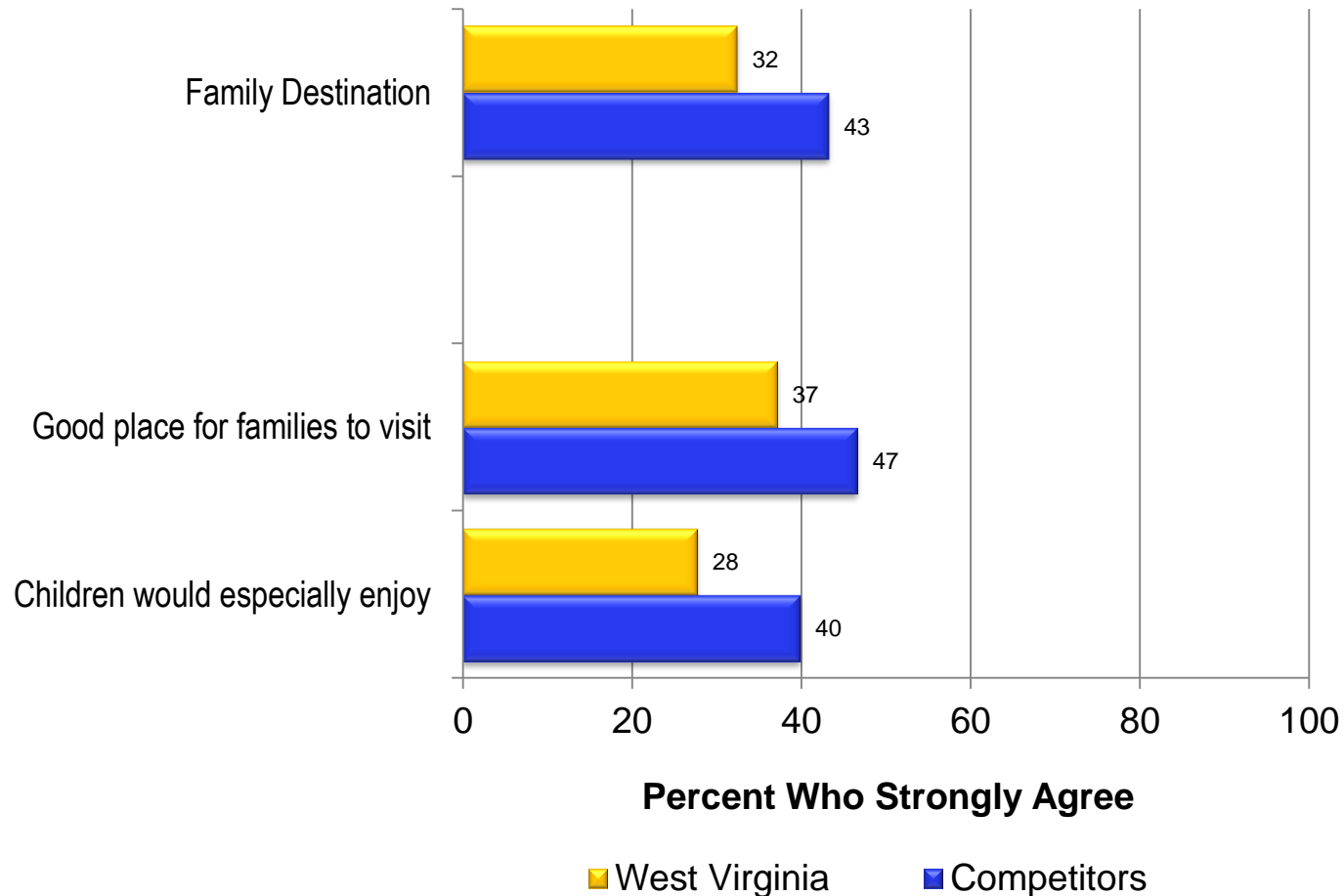
Base: Total Travelers



West Virginia Image vs. Competitors — Family Destination



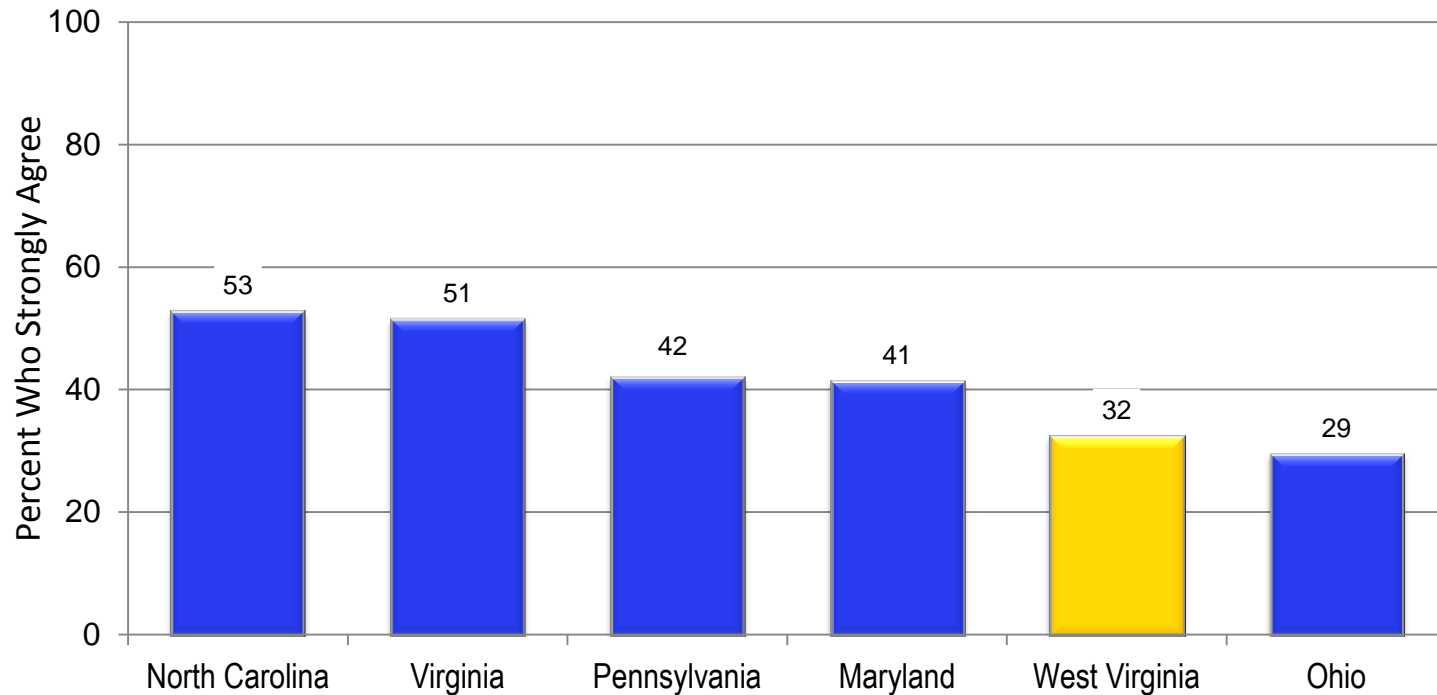
Base: Total Travelers



West Virginia Image vs. Competitors — Family Destination



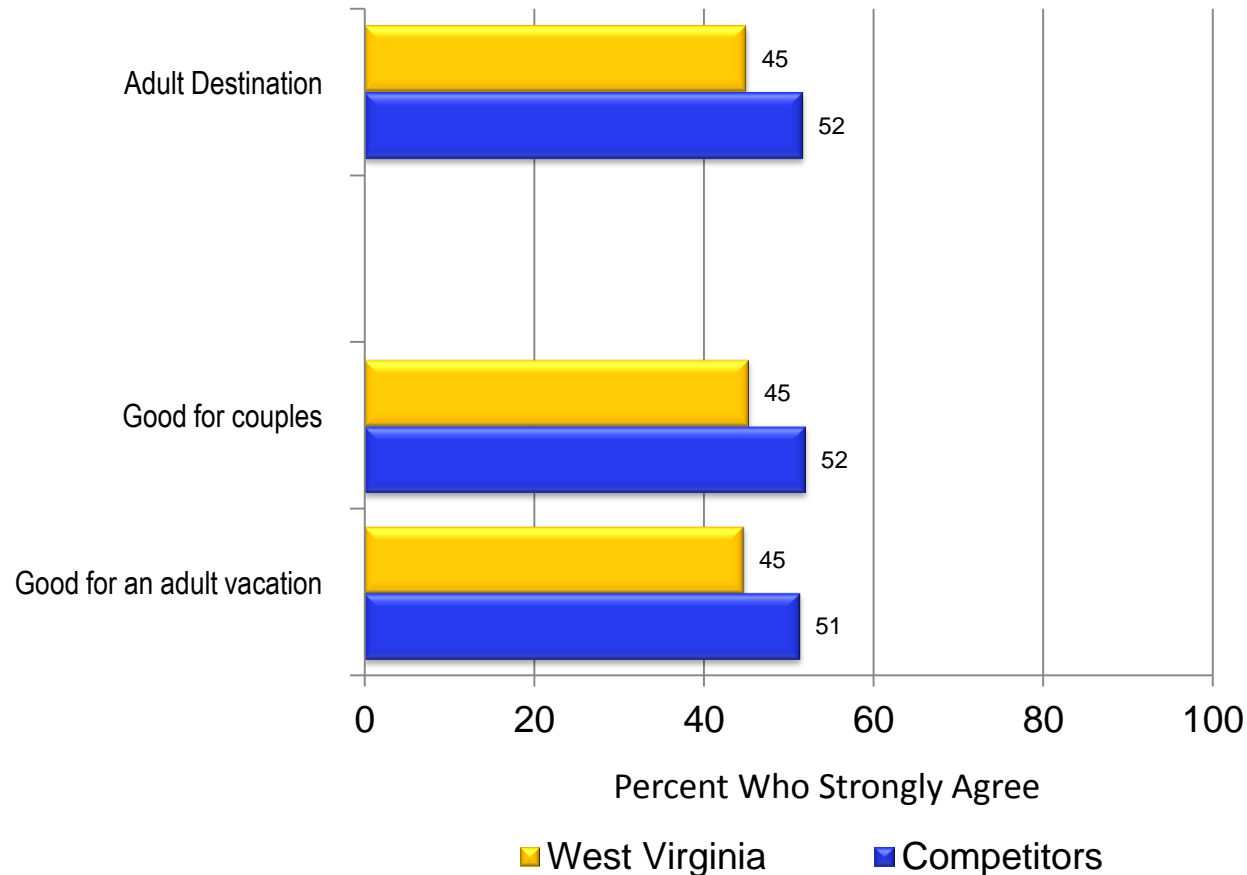
Base: Total Travelers



West Virginia Image vs. Competitors — Adult Destination



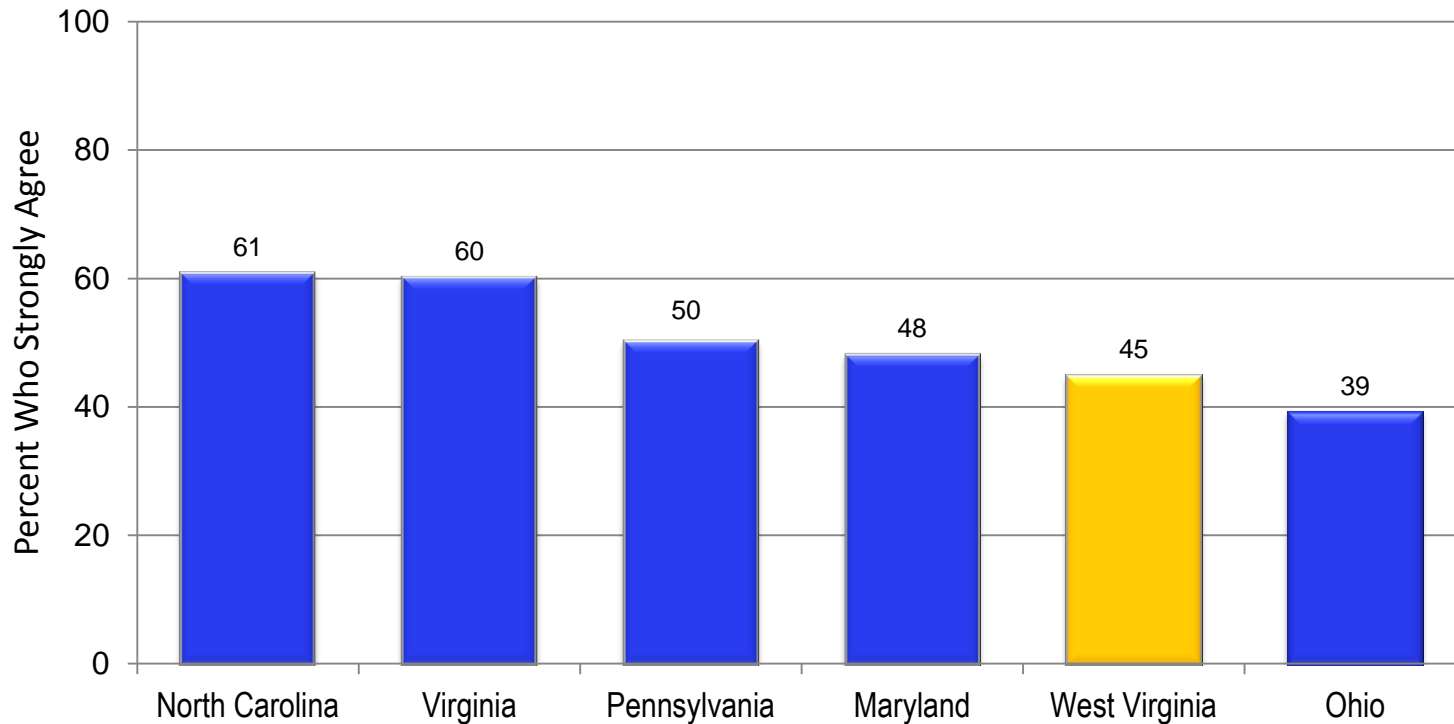
Base: Total Travelers



West Virginia Image vs. Competitors — Adult Destination



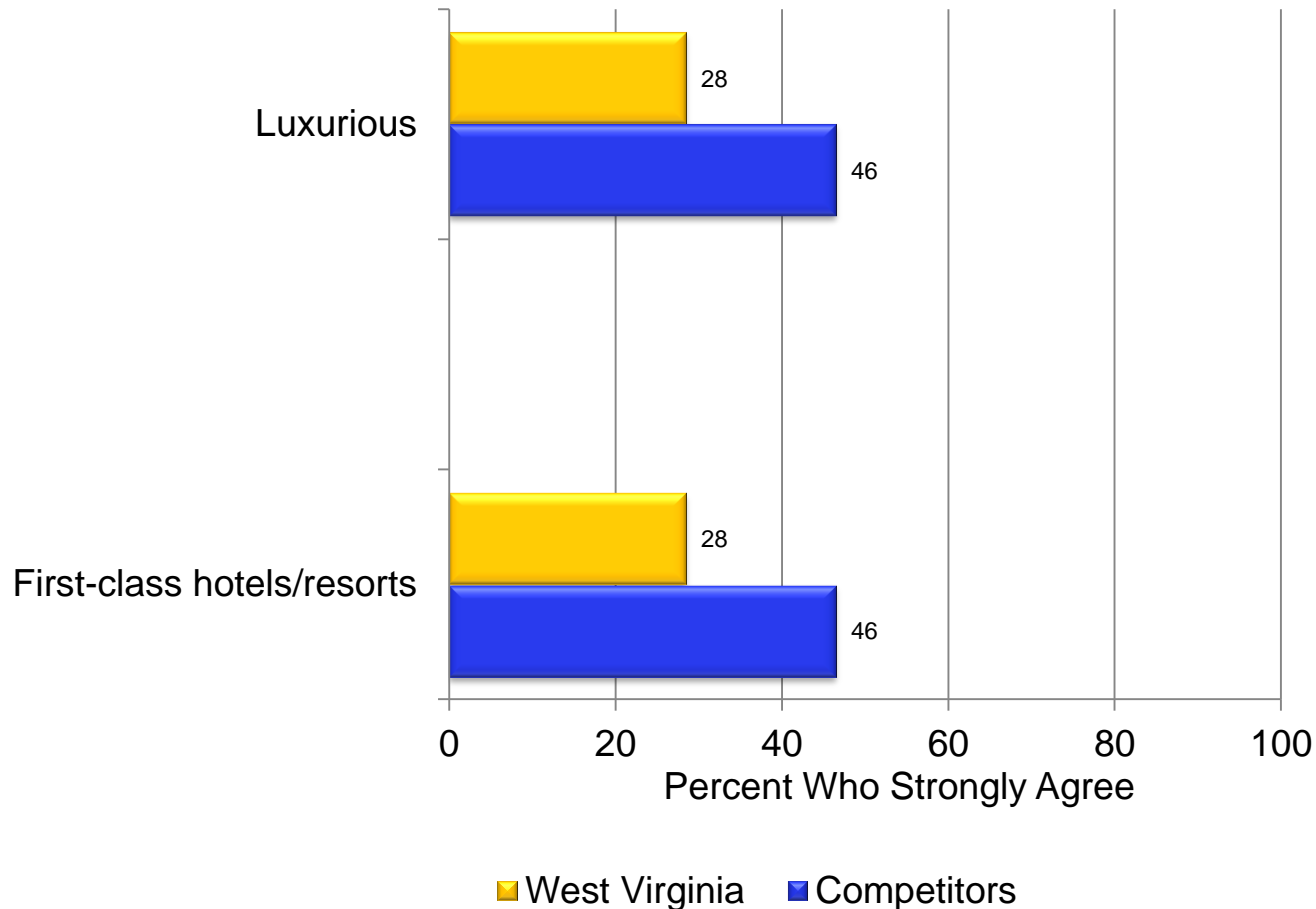
Base: Total Travelers



West Virginia Image vs. Competitors — Luxurious



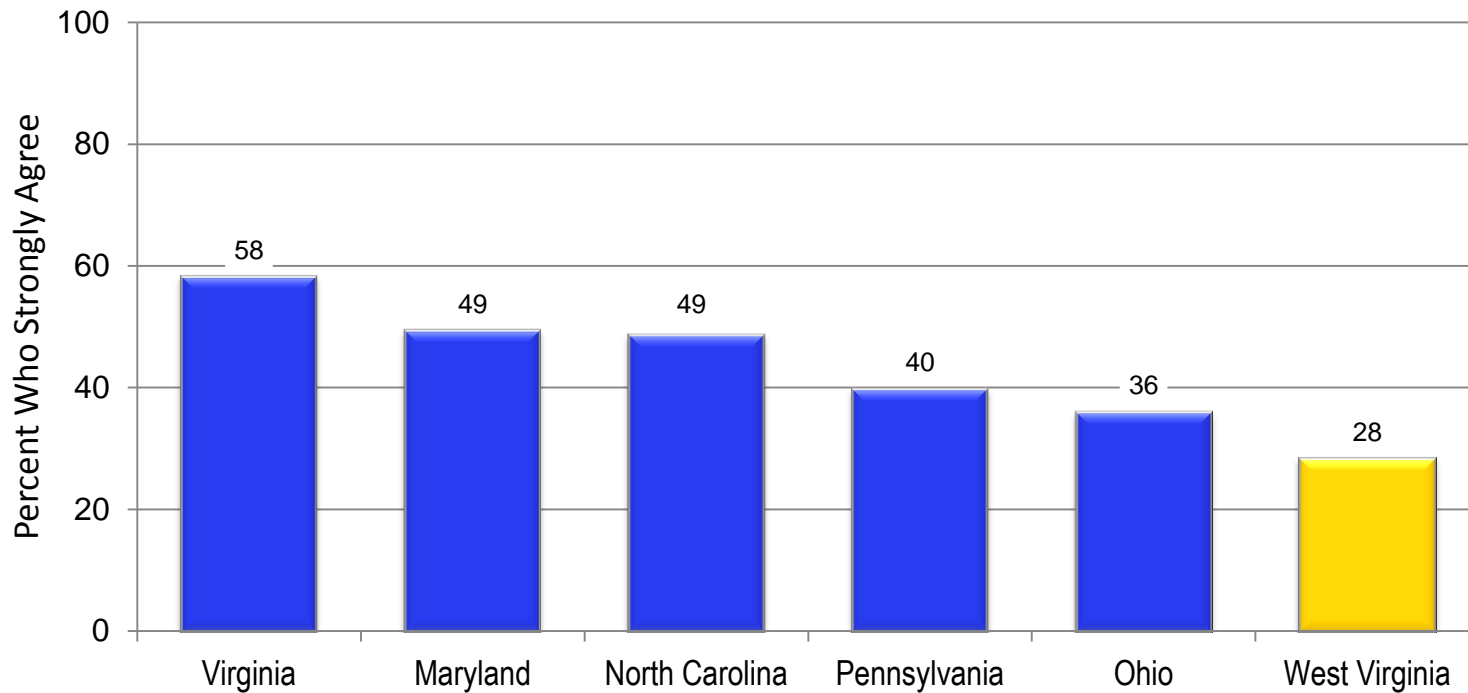
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West Virginia Image vs. Competitors — Luxurious



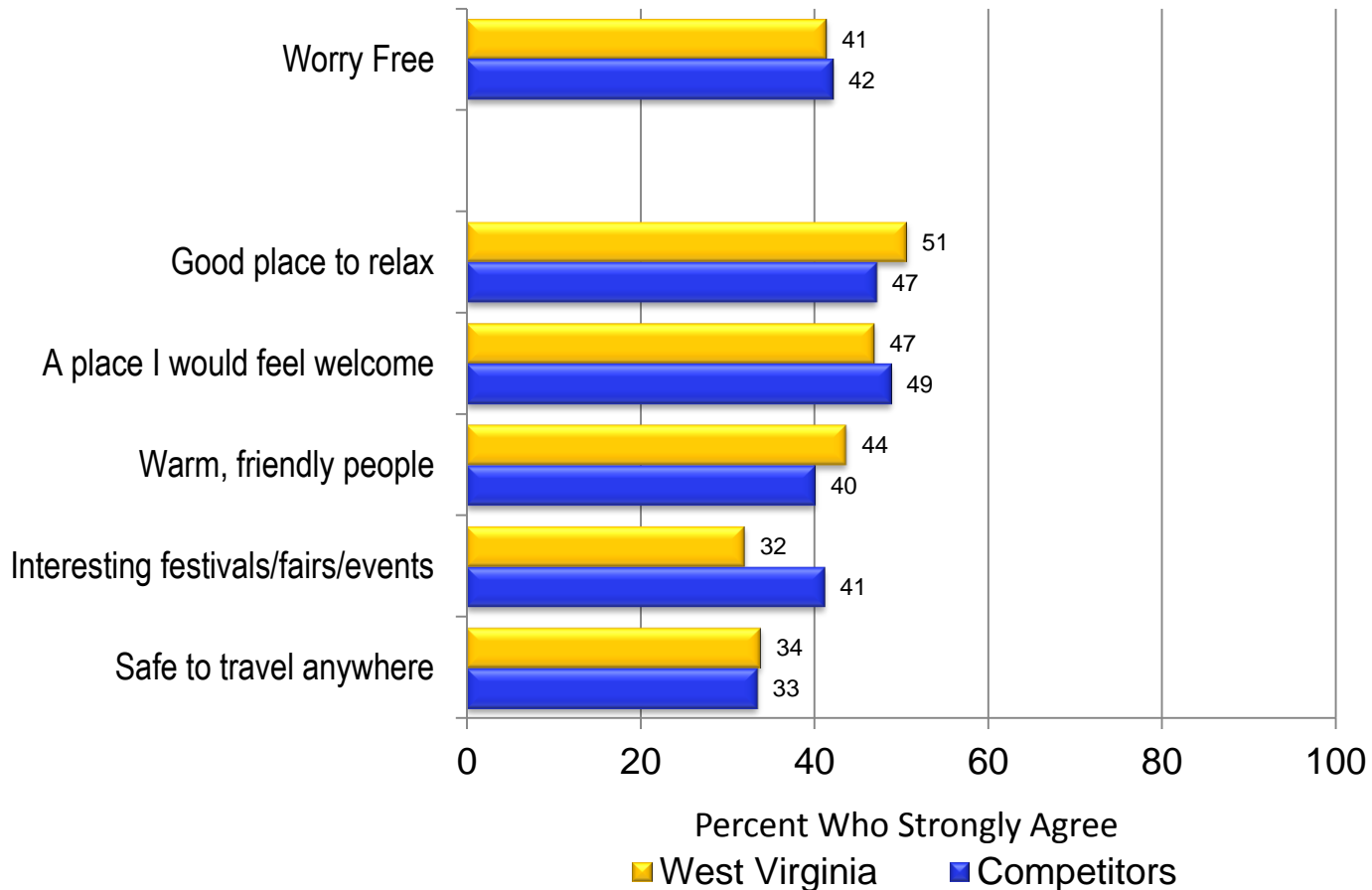
Base: Total Travelers



West Virginia Image vs. Competitors — Worry Free



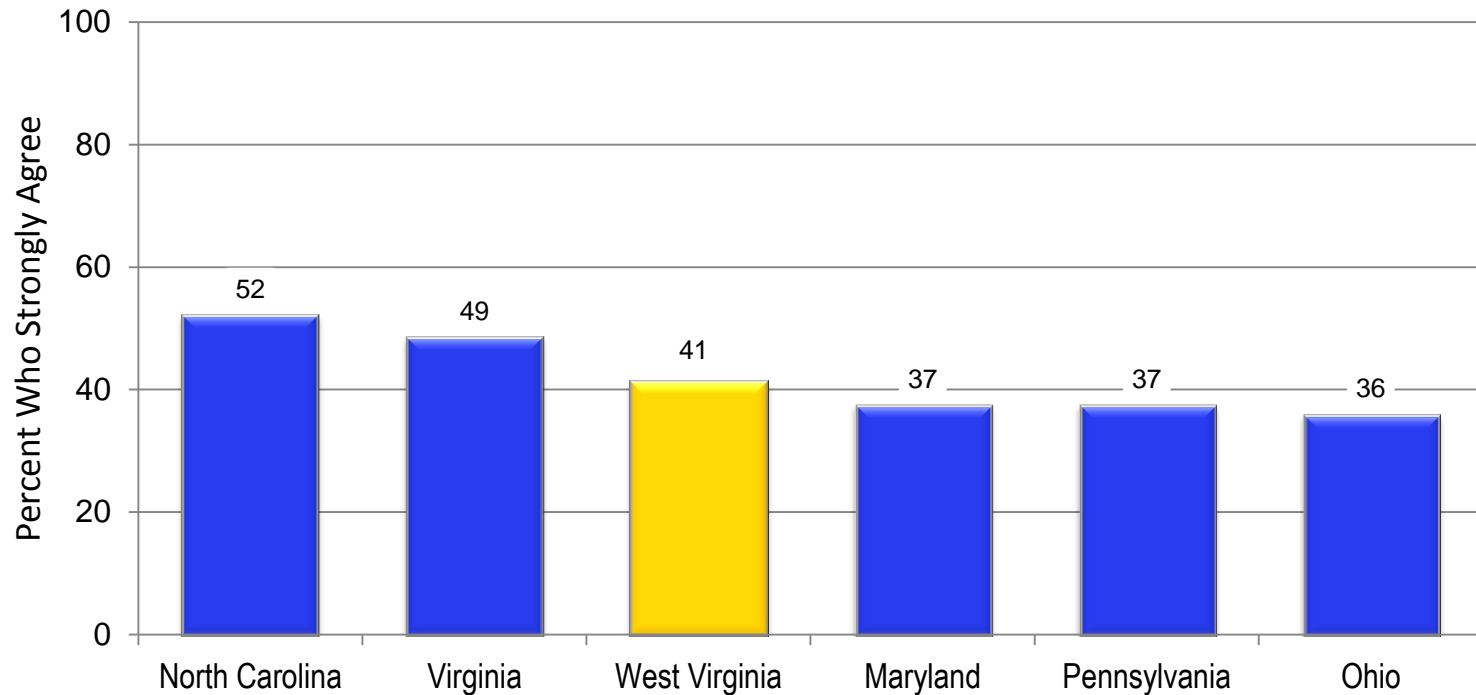
Base: Total Travelers



West Virginia's Image vs. Competitors — Worry Free



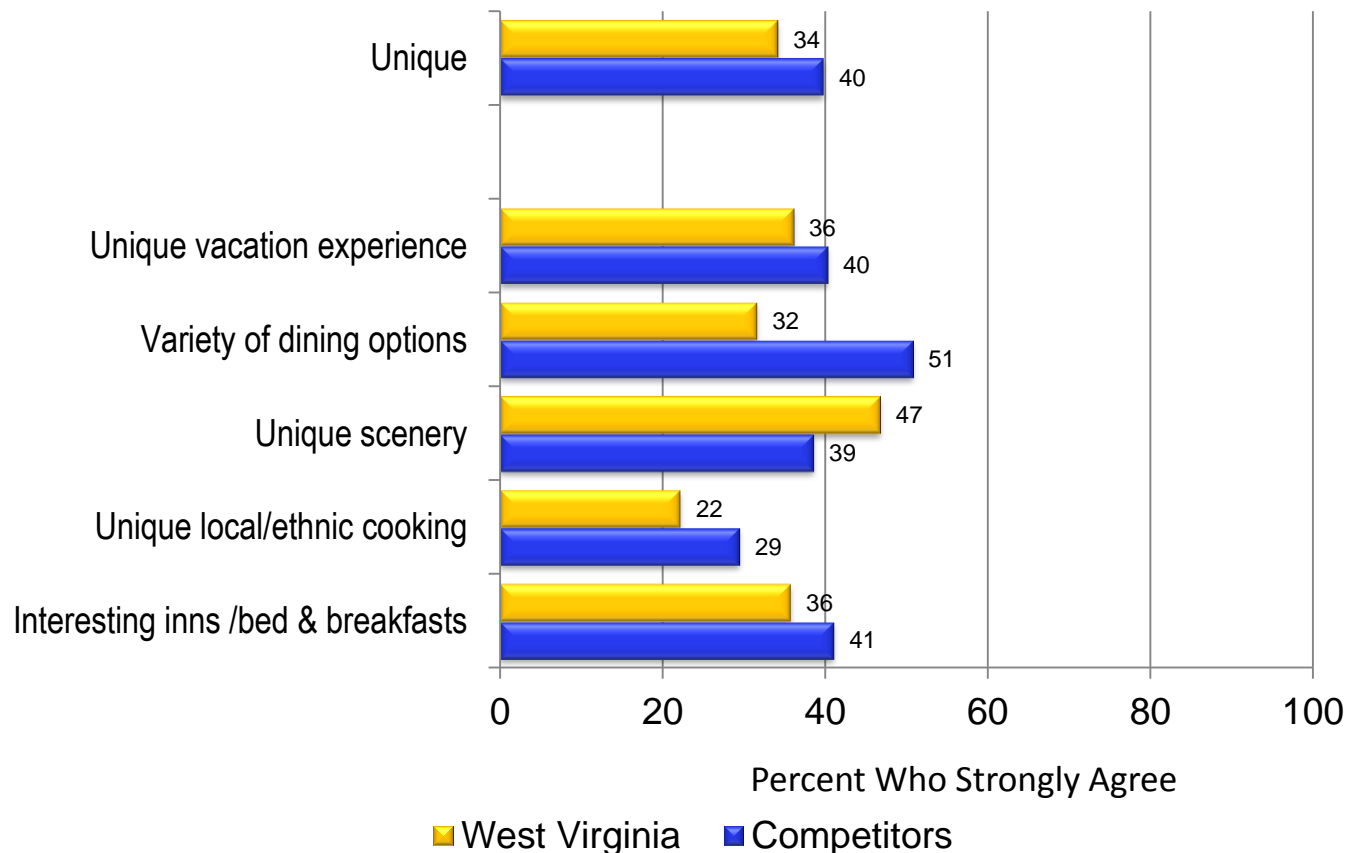
Base: Total Travelers



West Virginia Image vs. Competitors — Unique



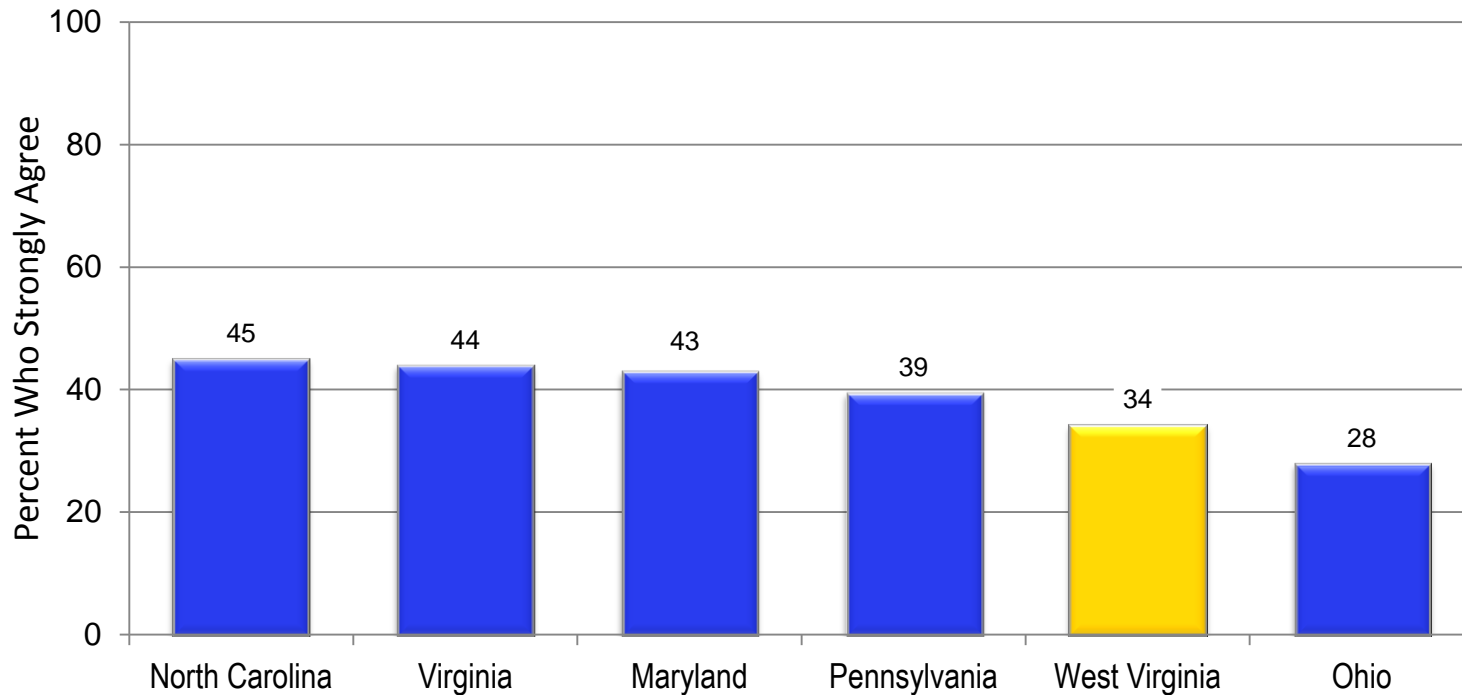
Base: Total Travelers



West Virginia Image vs. Competitors — Unique



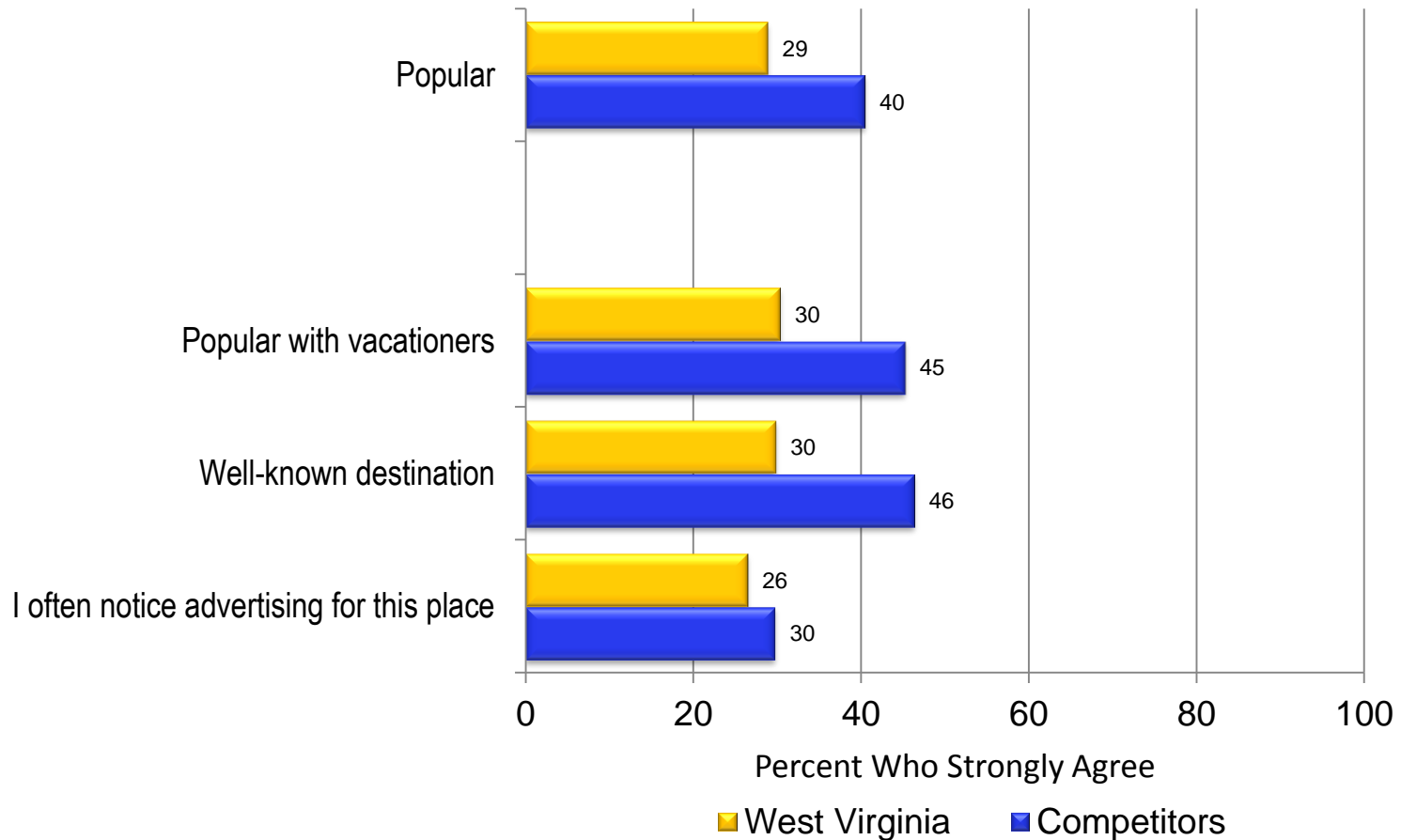
Base: Total Travelers



West Virginia Image vs. Competitors — Popular



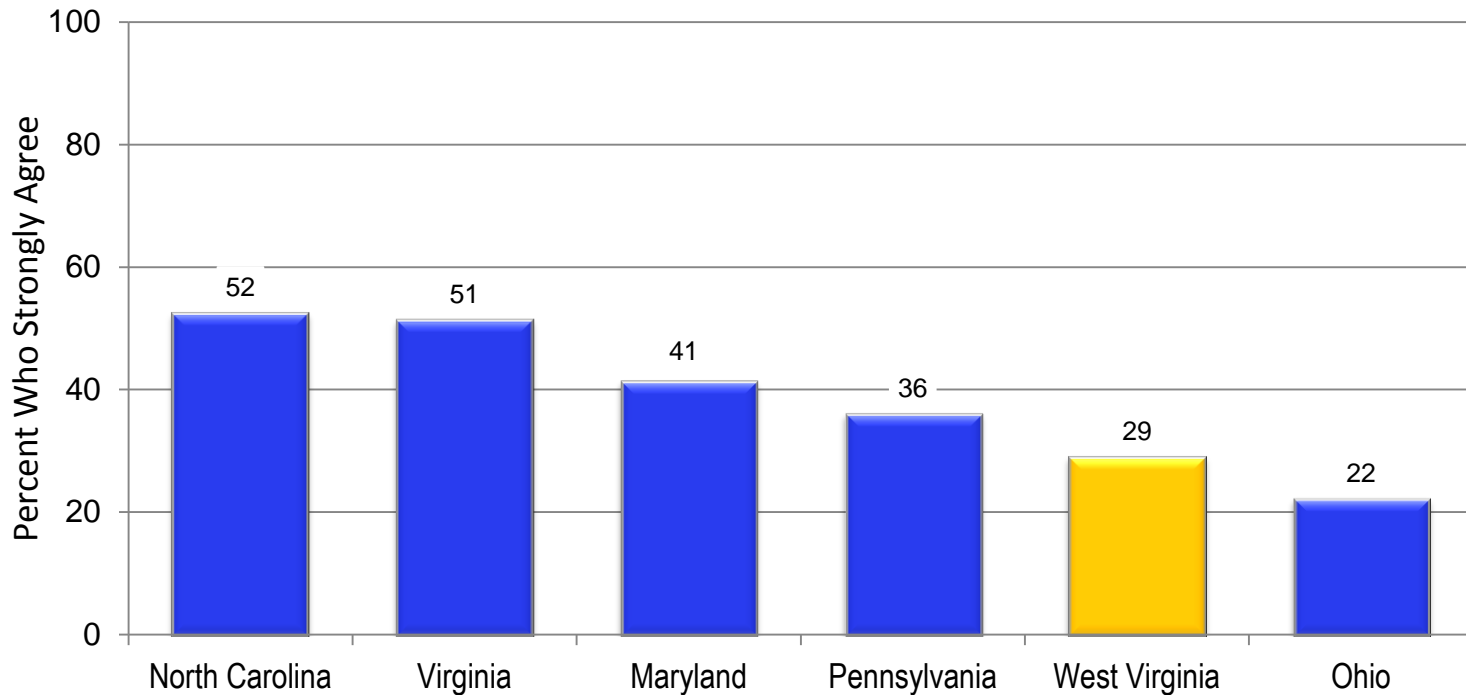
Base: Total Travelers



West Virginia Image vs. Competitors — Popular



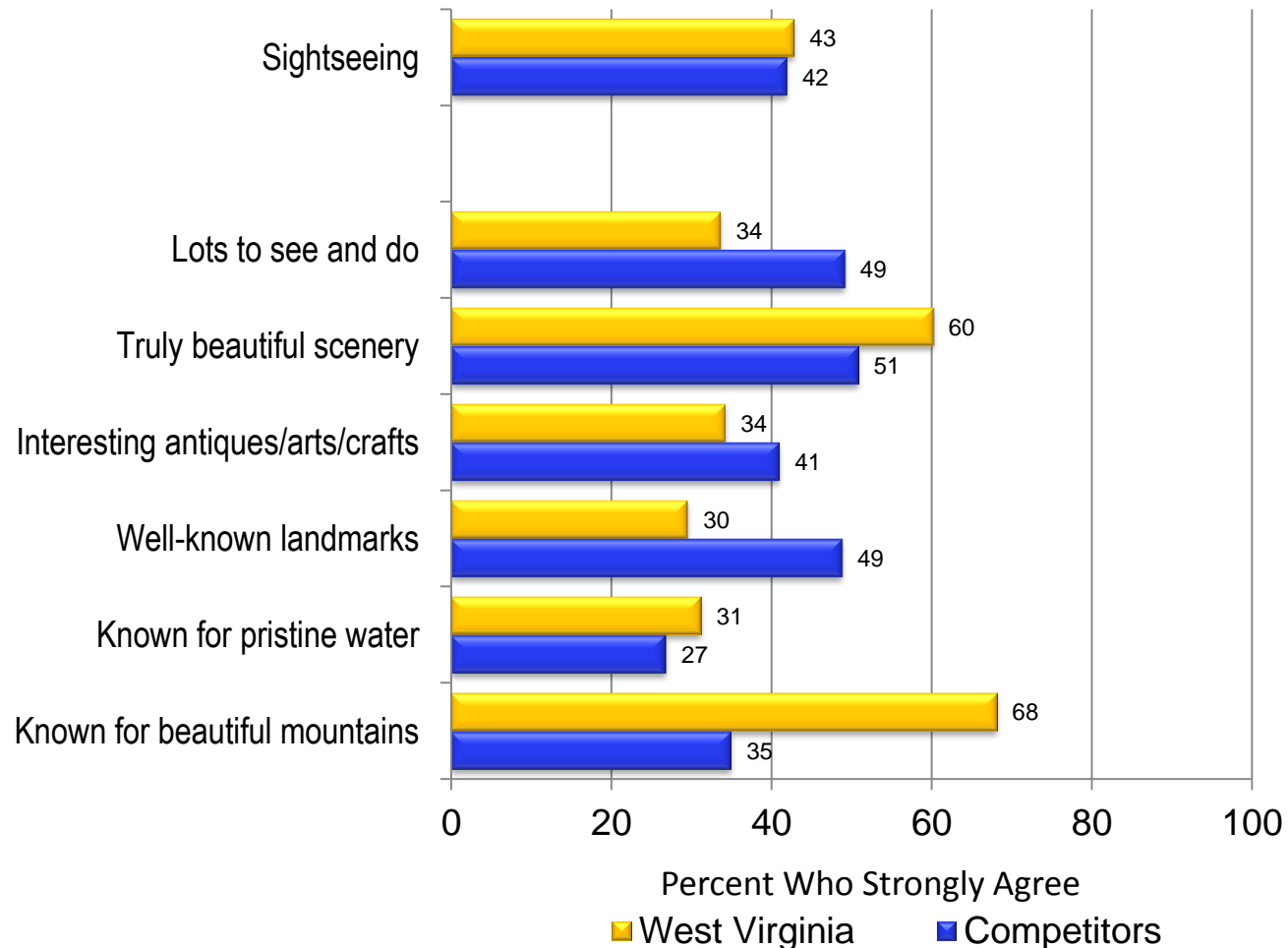
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West Virginia Image vs. Competitors — Sightseeing



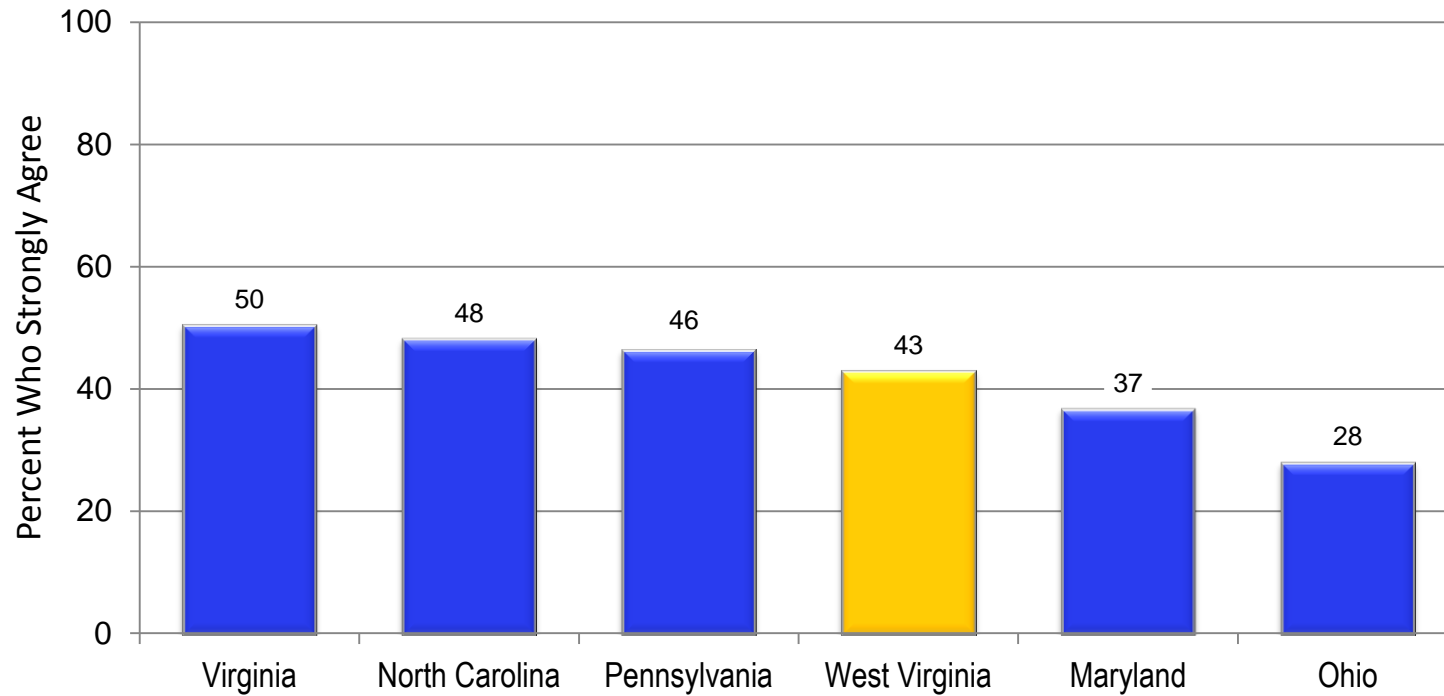
Base: Total Travelers



West Virginia Image vs. Competitors — Sightseeing



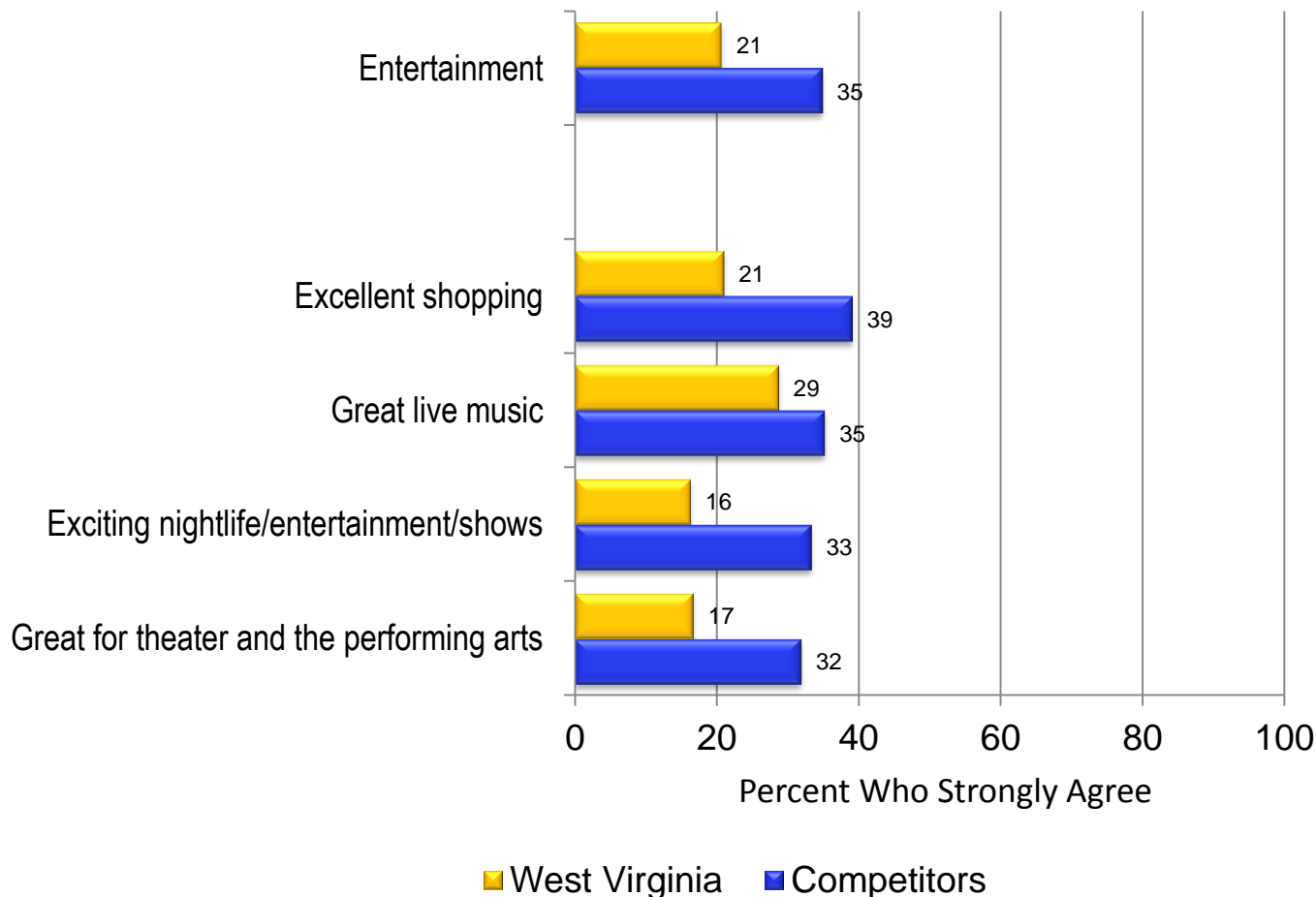
Base: Total Travelers



West Virginia Image vs. Competitors — Entertainment



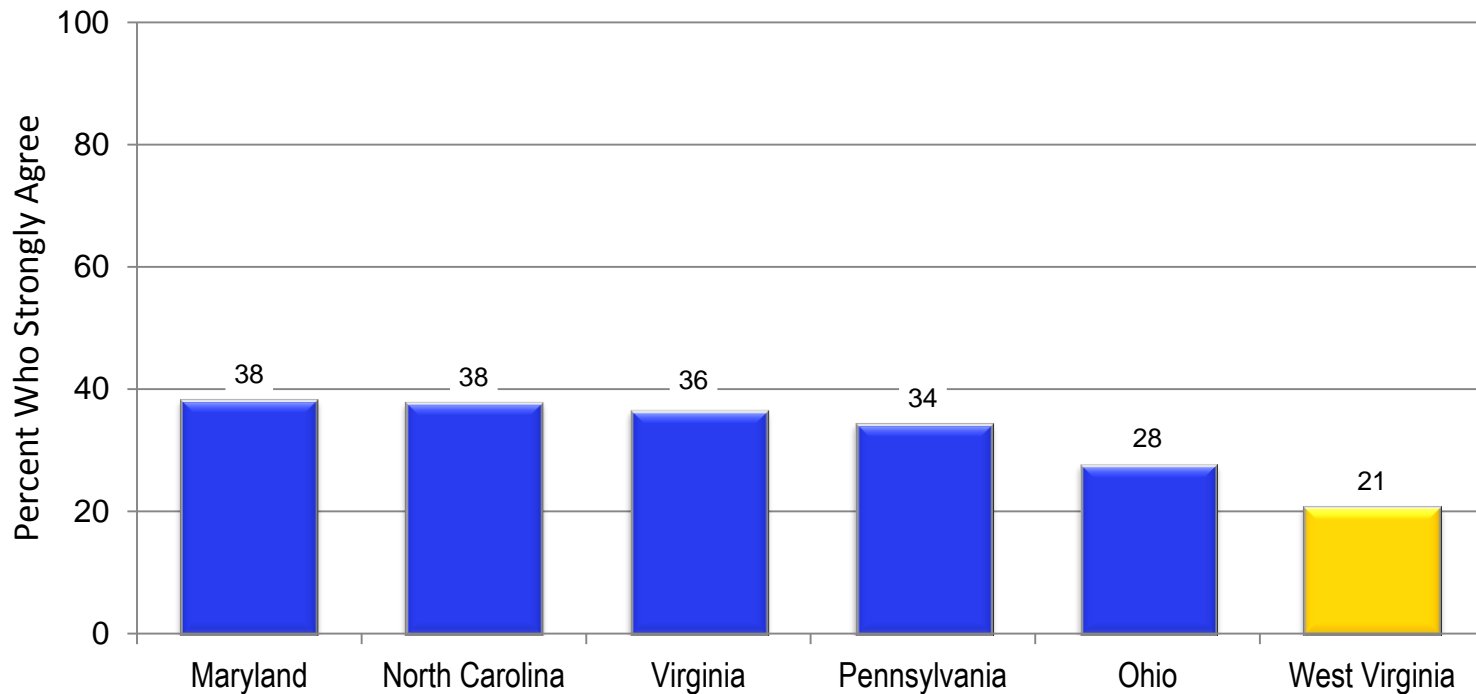
Base: Total Travelers



West Virginia Image vs. Competitors — Entertainment



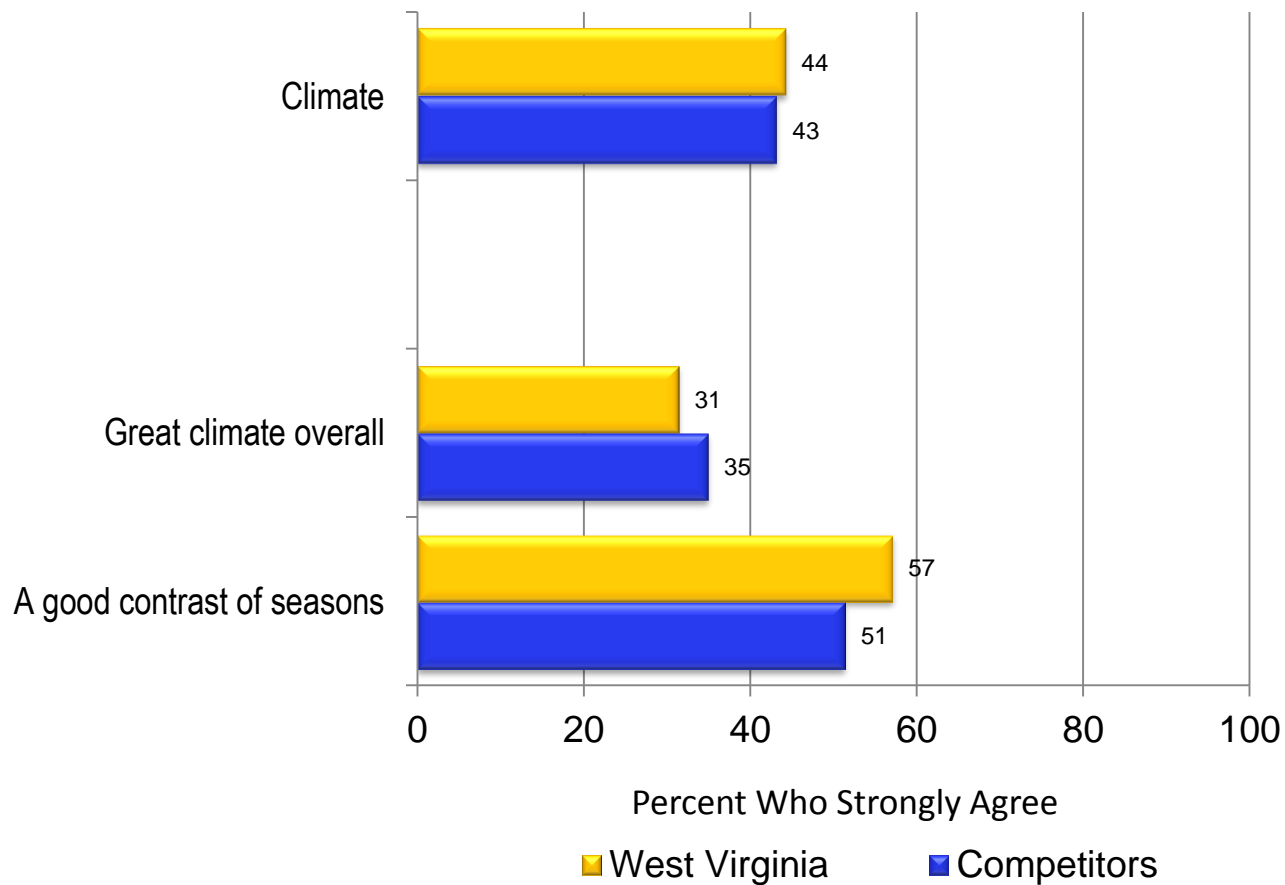
Base: Total Travelers



West Virginia Image vs. Competitors — Climate



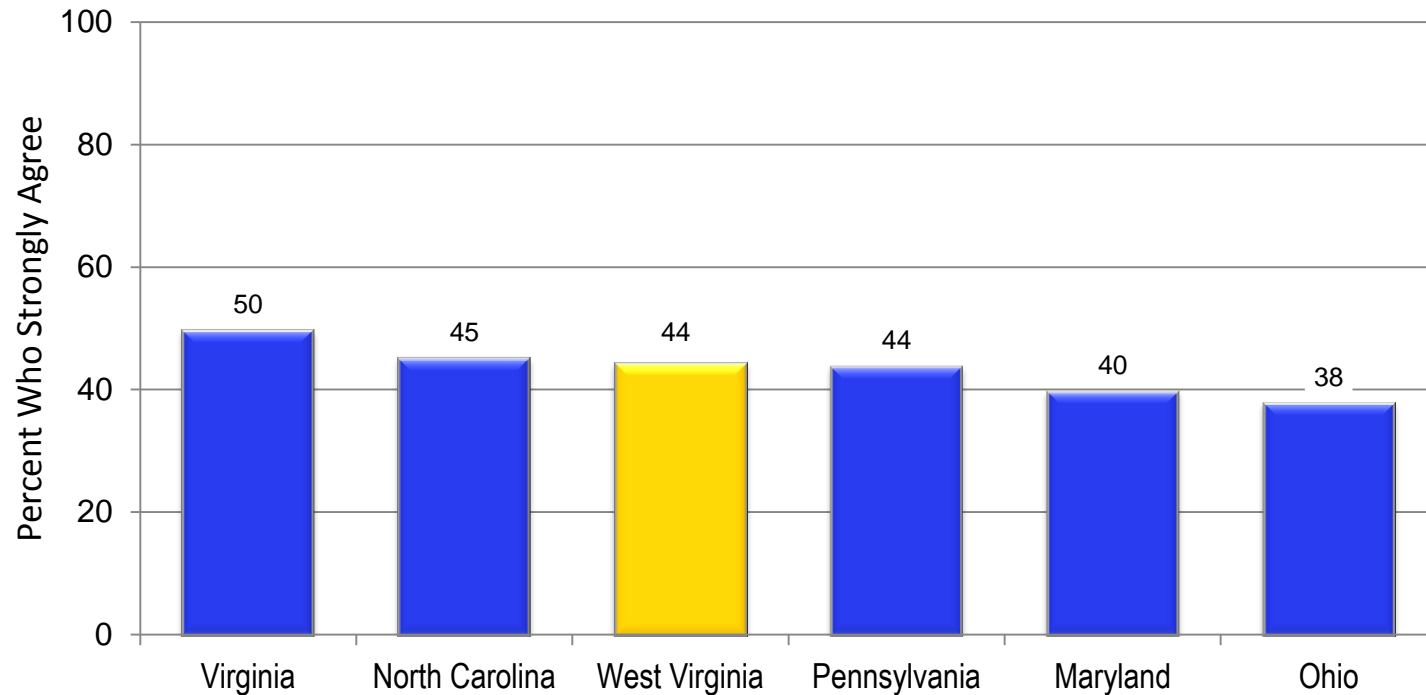
Base: Total Travelers



West Virginia Image vs. Competitors — Climate



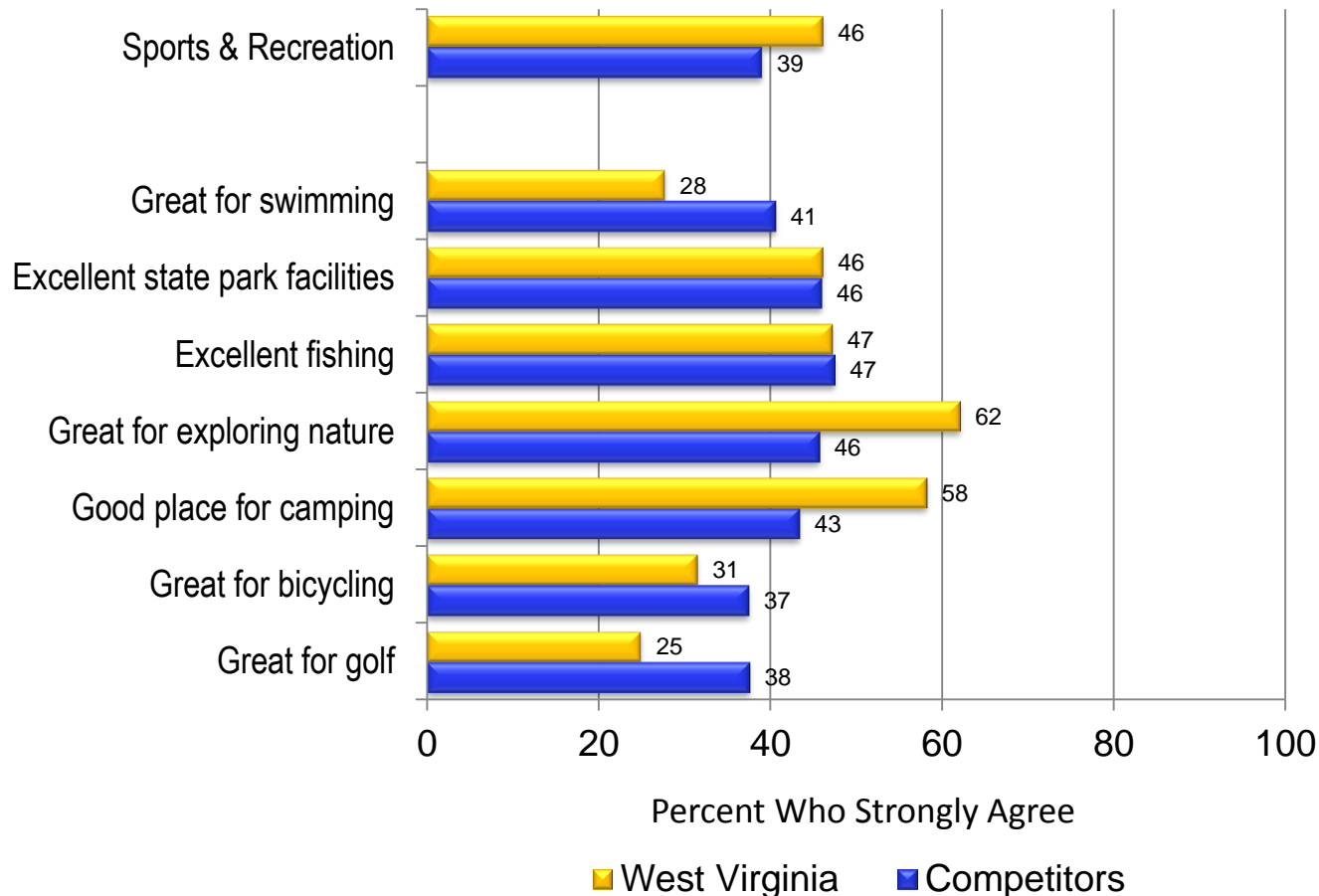
Base: Total Travelers



West Virginia Image vs. Competitors — Sports and Recreation



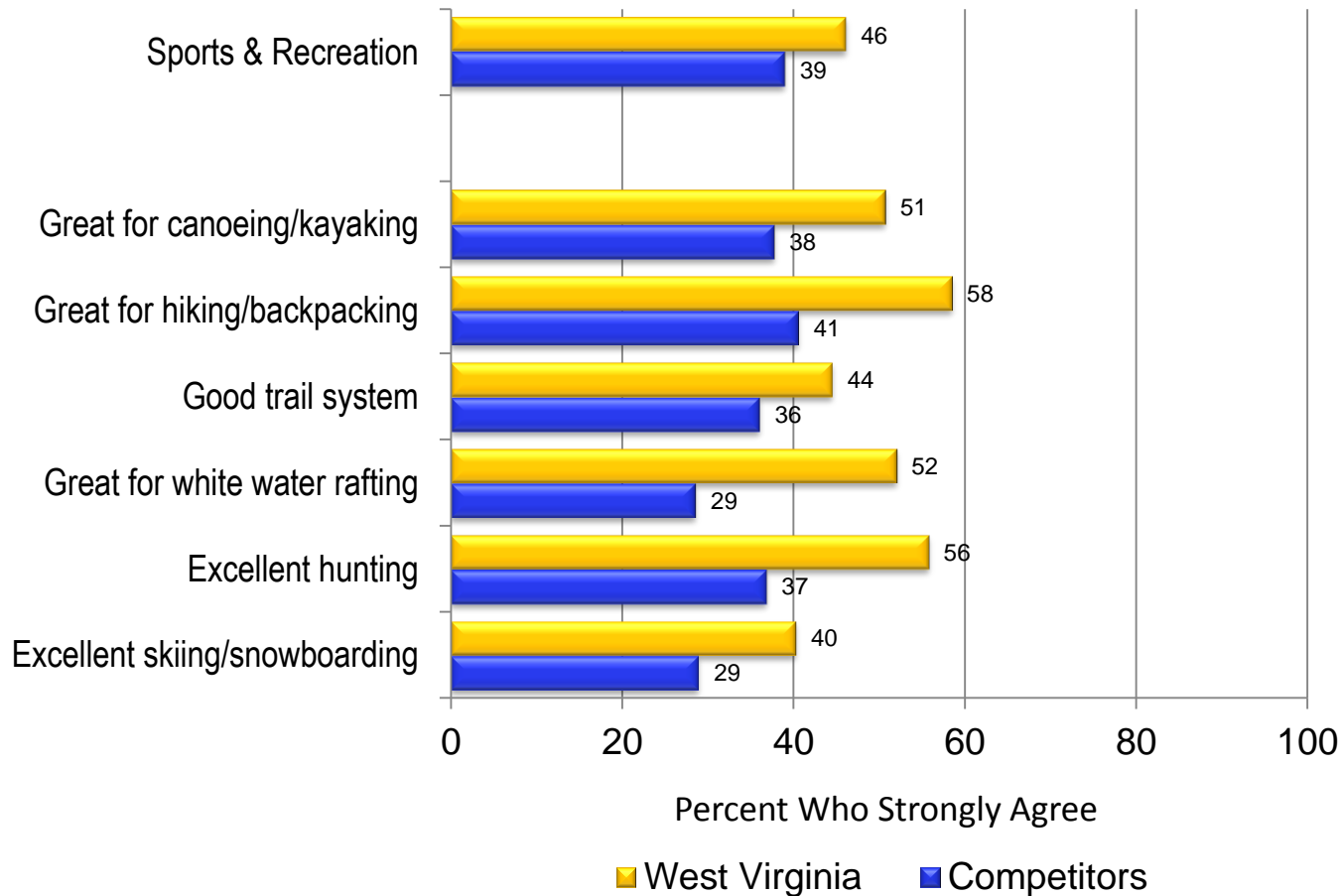
Base: Total Travelers



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



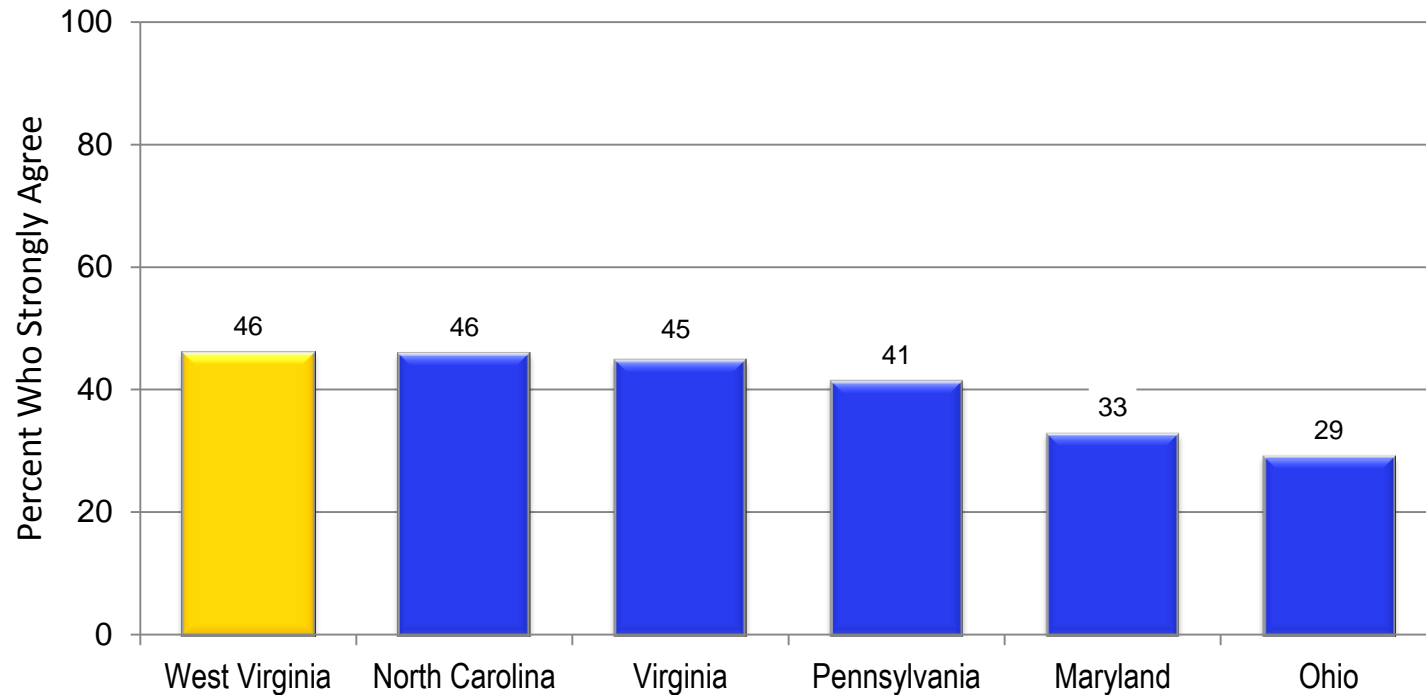
Base: Total Travelers



West Virginia Image vs. Competitors — Sports and Recreation



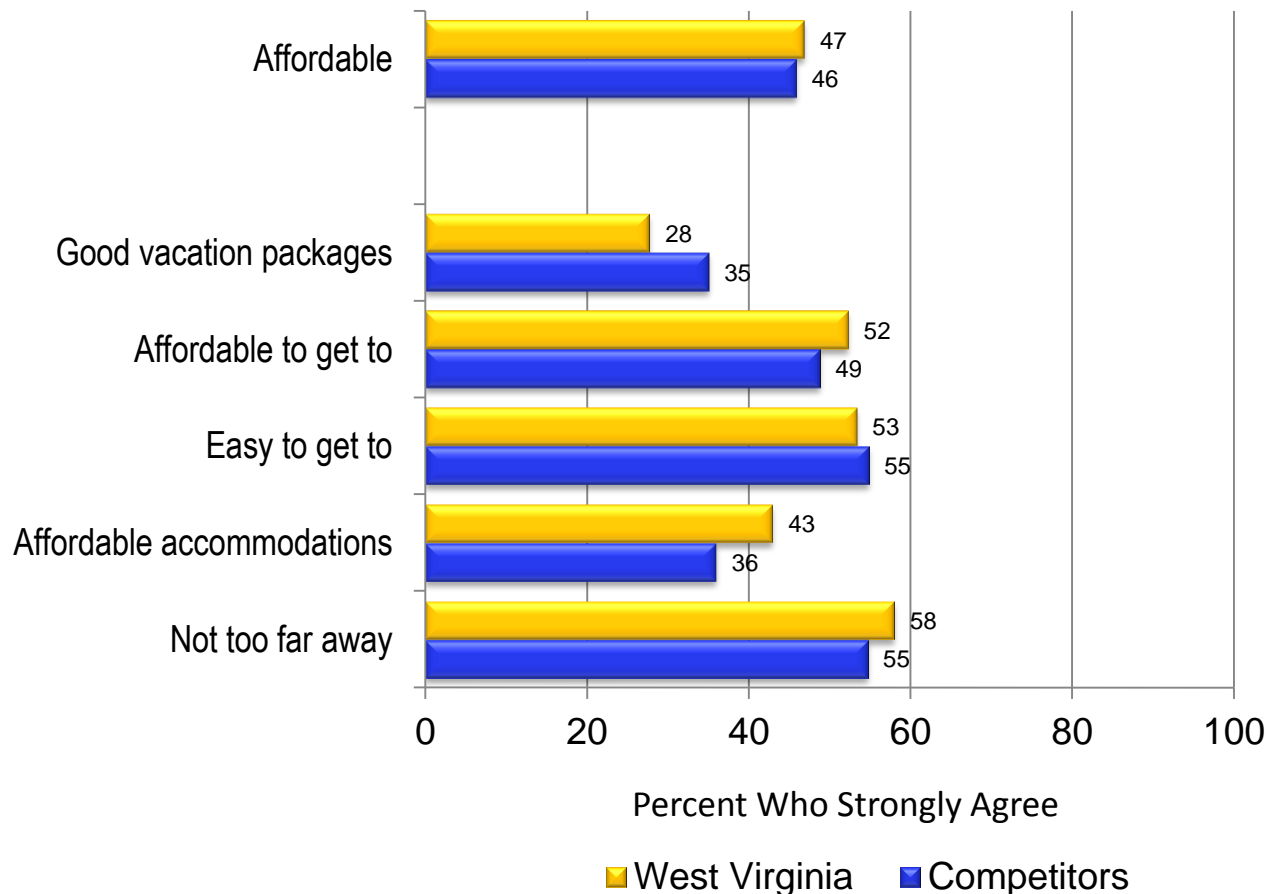
Base: Total Travelers



West Virginia Image vs. Competitors — Affordable



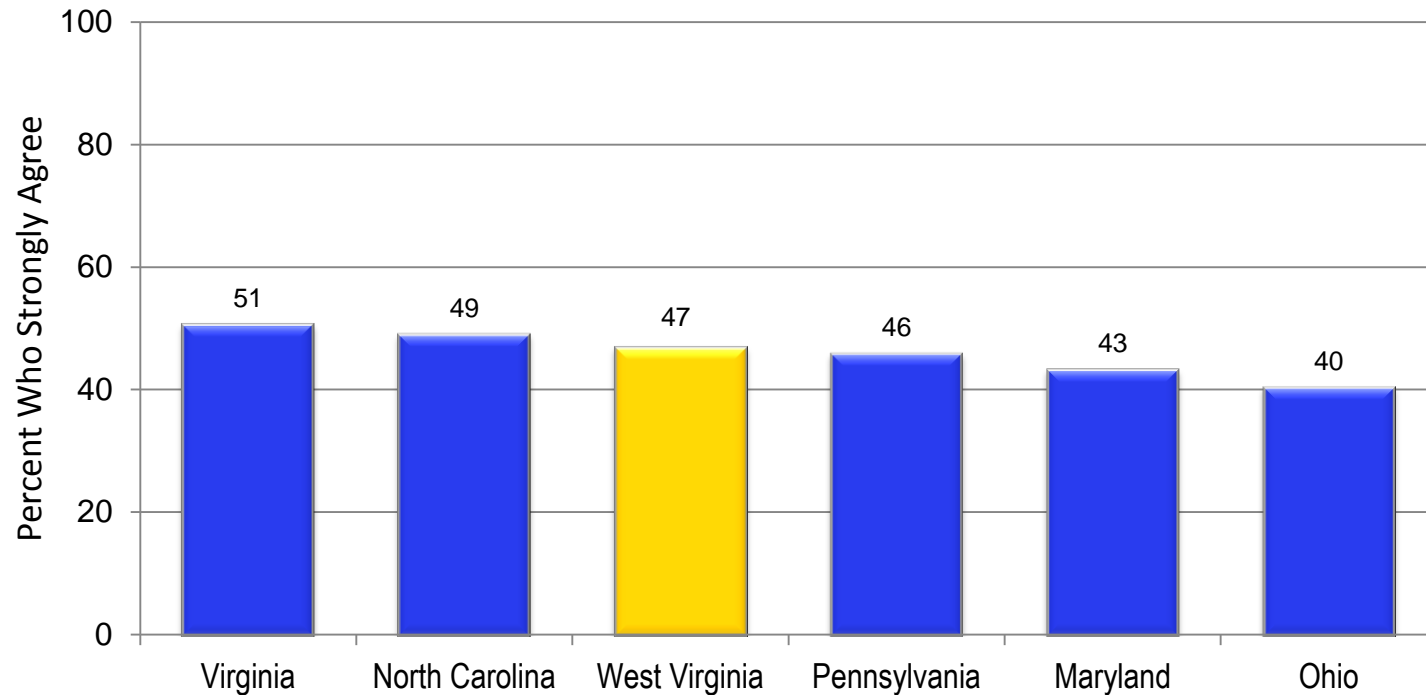
Base: Total Travelers



West Virginia Image vs. Competitors — Affordable



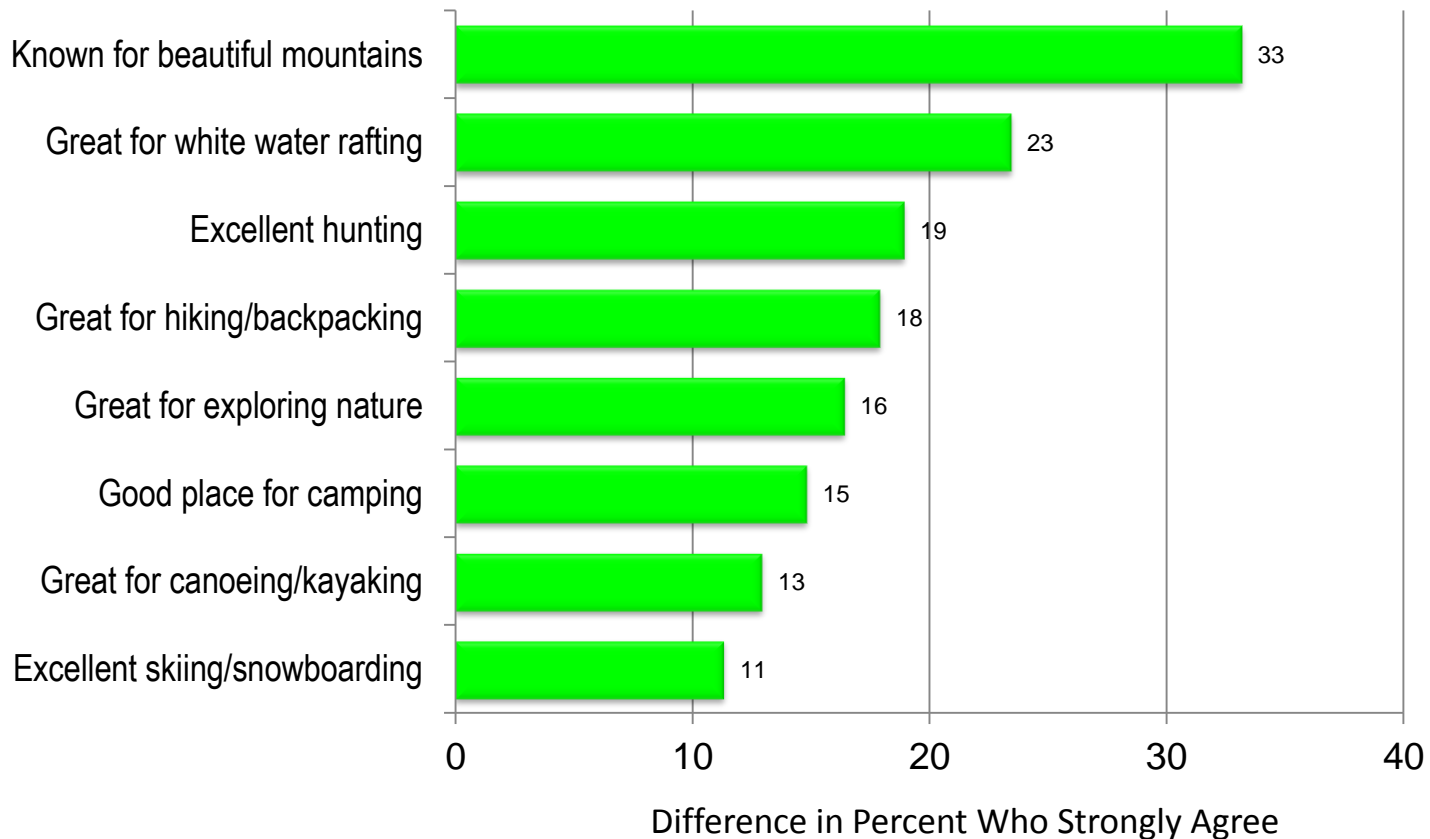
Base: Total Travelers



West Virginia Image Strengths vs. Competitors



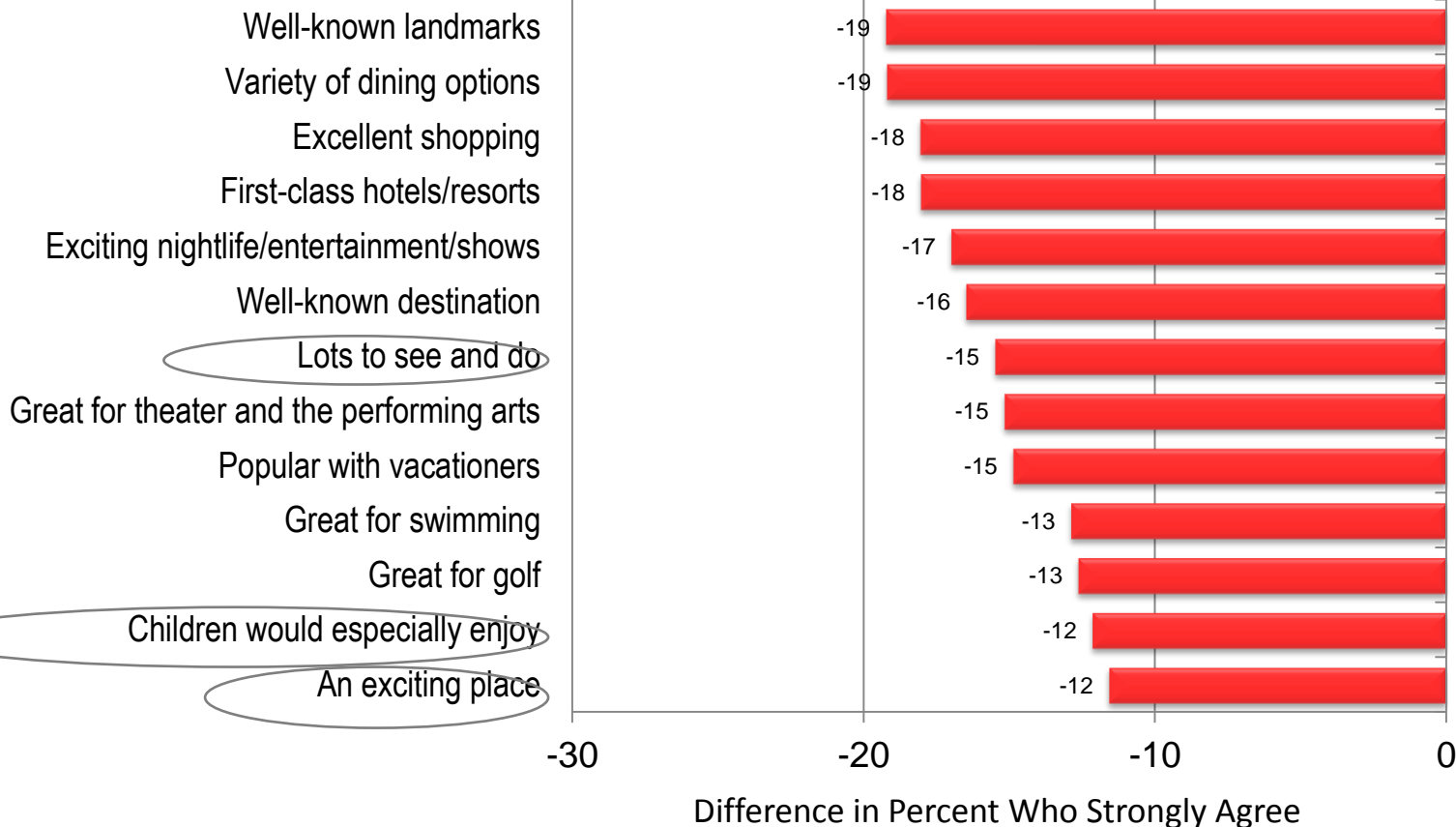
Base: Total Travelers



West Virginia Image Weaknesses vs. Competitors



Base: Total Travelers

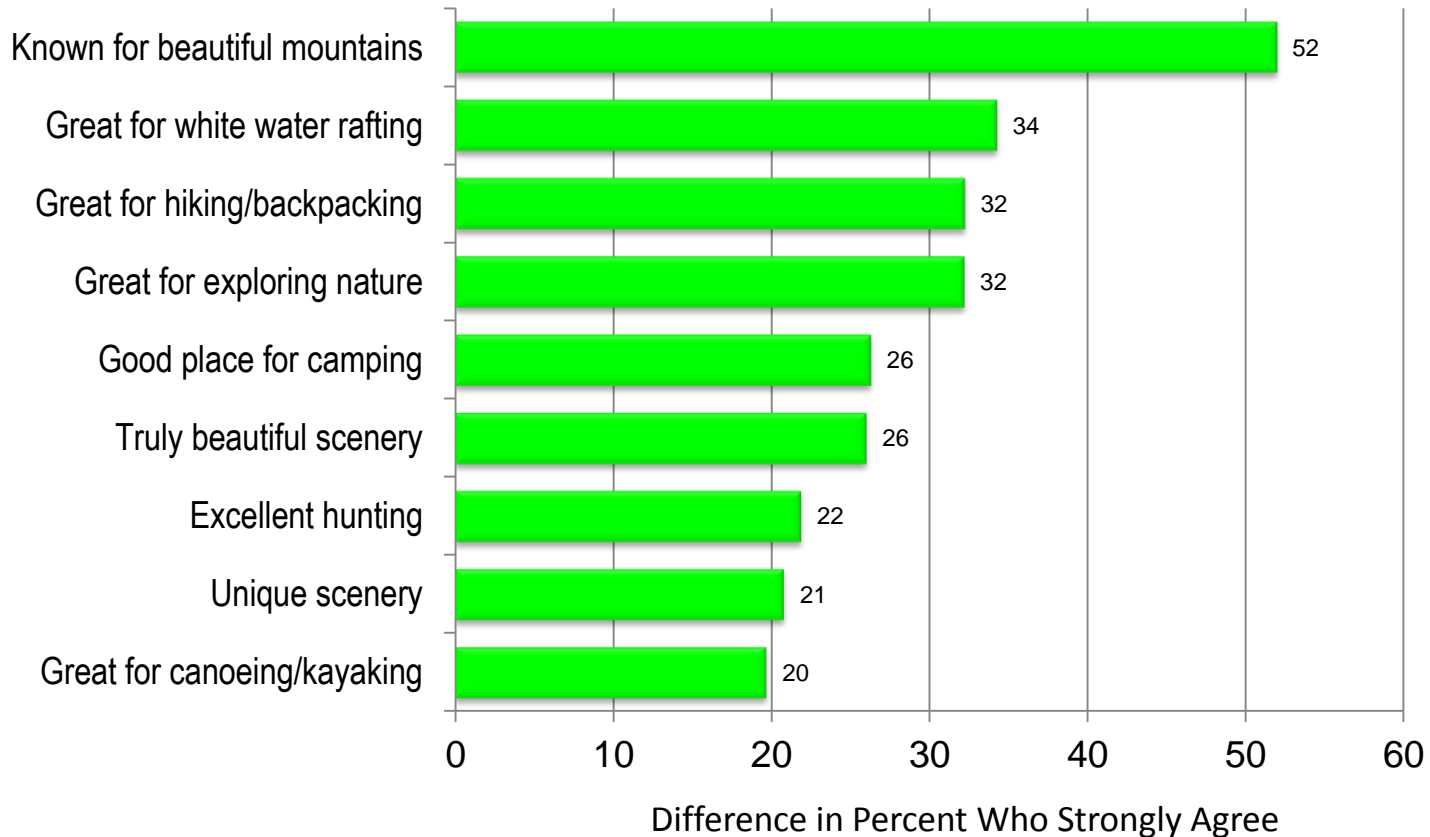


Note: Circled attributes are some of the most important image hot buttons for travelers

West Virginia Image Strengths vs. Ohio



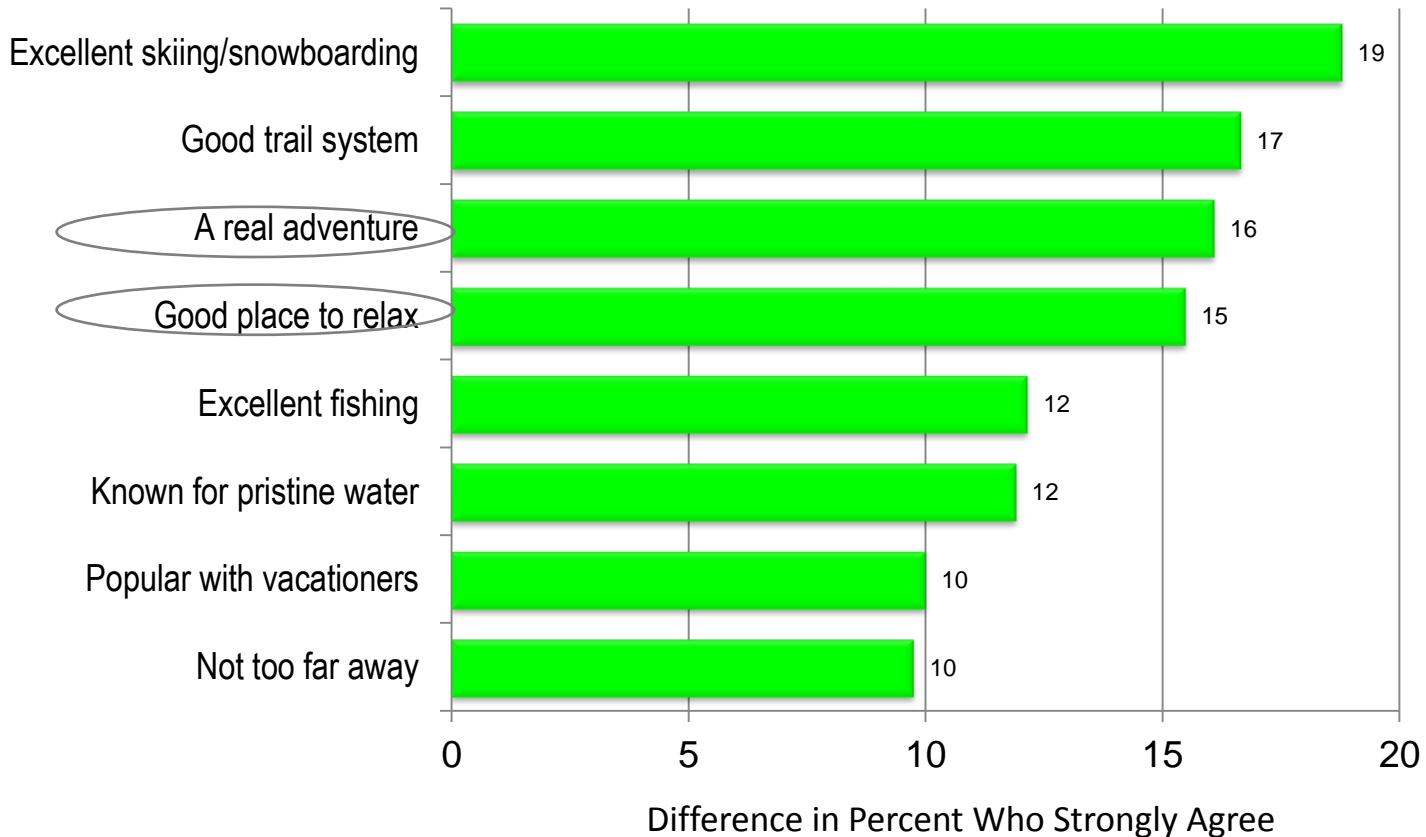
Base: Total Travelers



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



Base: Total Travelers

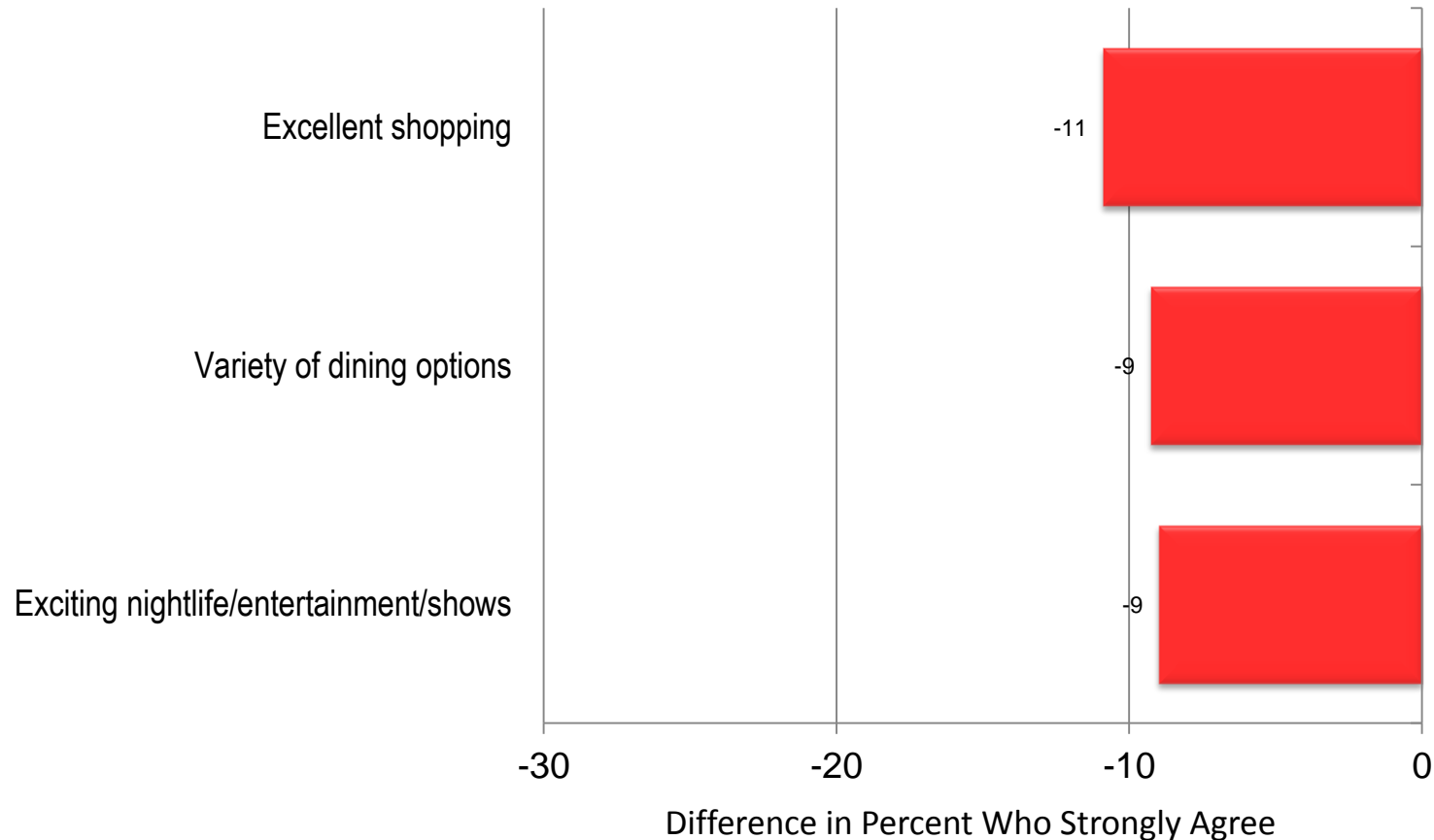


Note: Circled attributes are some of the most important image hot buttons for travelers

West Virginia Image Weaknesses vs. Ohio



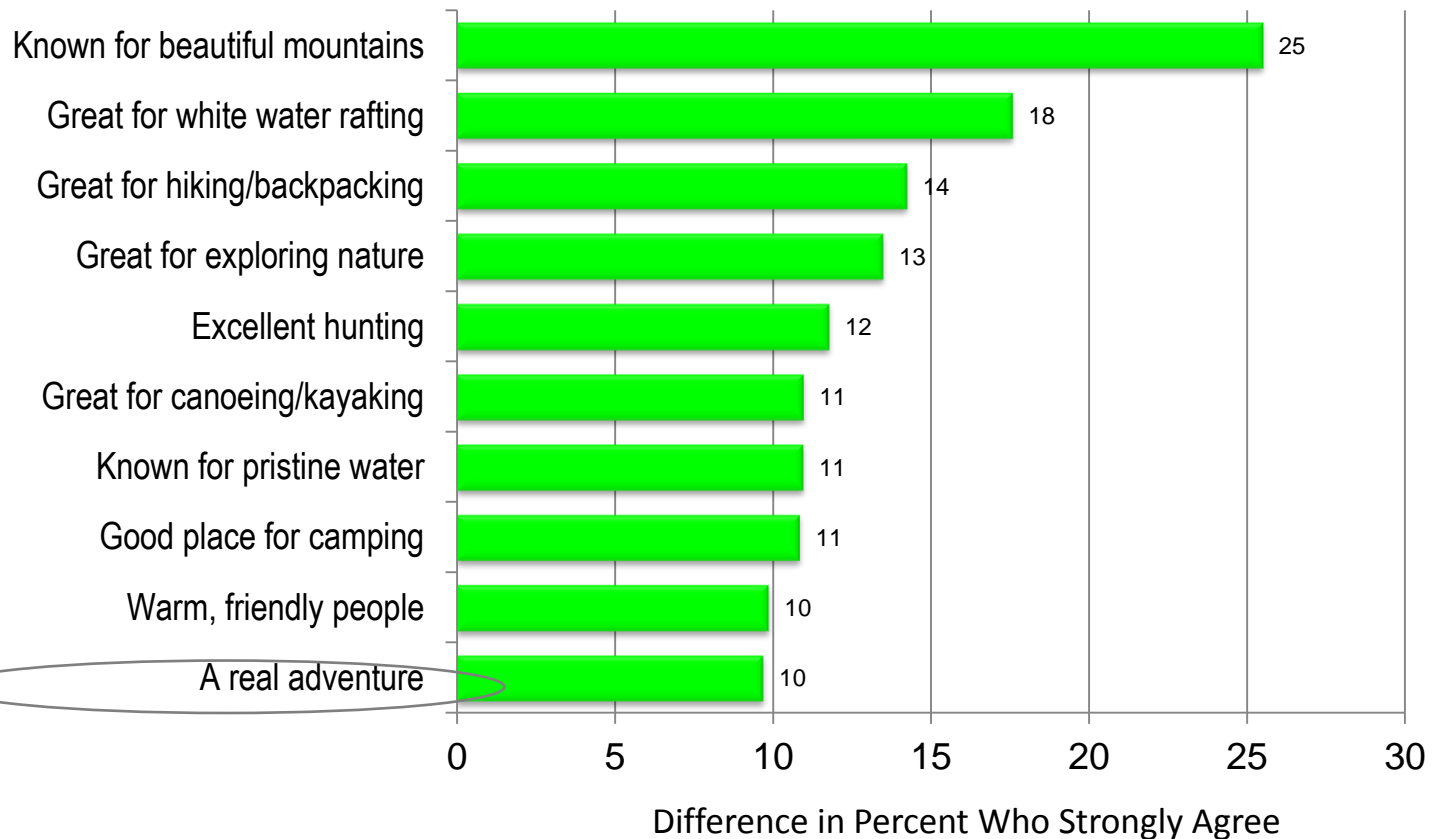
Base: Total Travelers



West Virginia Image Strengths vs. Pennsylvania



Base: Total Travelers

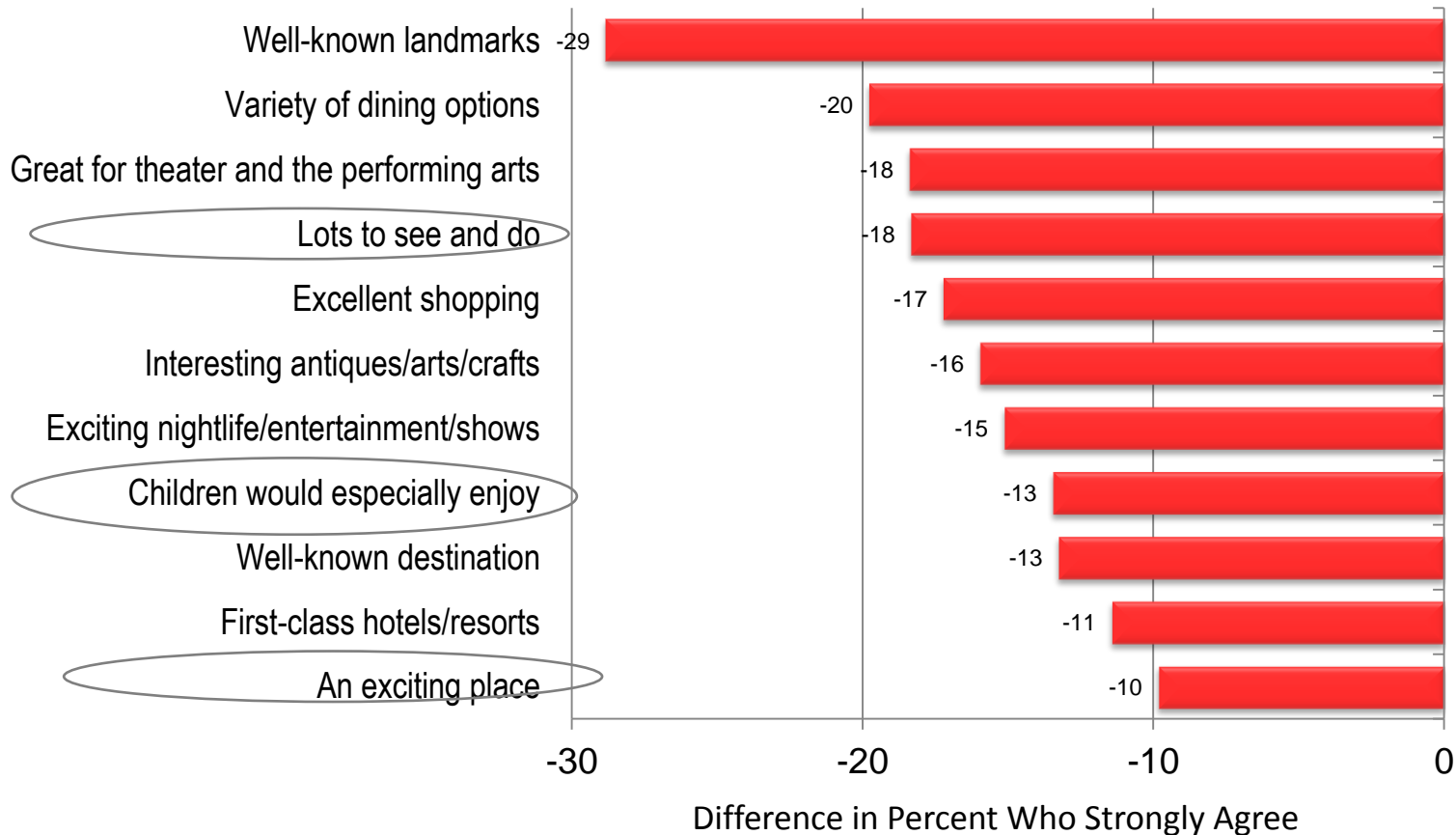


Note: Circled attributes are some of the most important image hot buttons for travelers

West Virginia Image Weaknesses vs. Pennsylvania



Base: Total Travelers

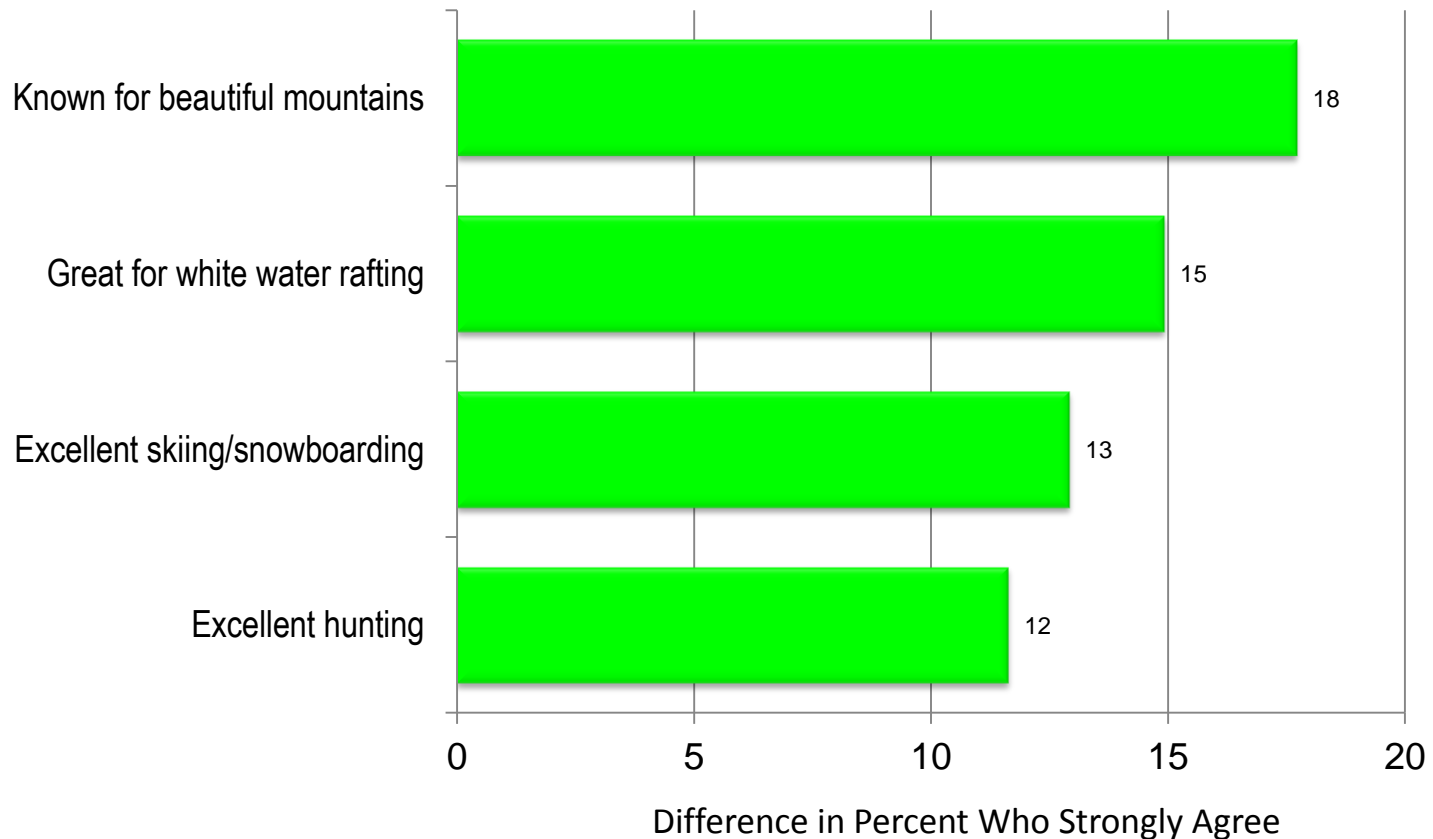


Note: Circled attributes are some of the most important image hot buttons for travelers

West Virginia Image Strengths vs. Virginia



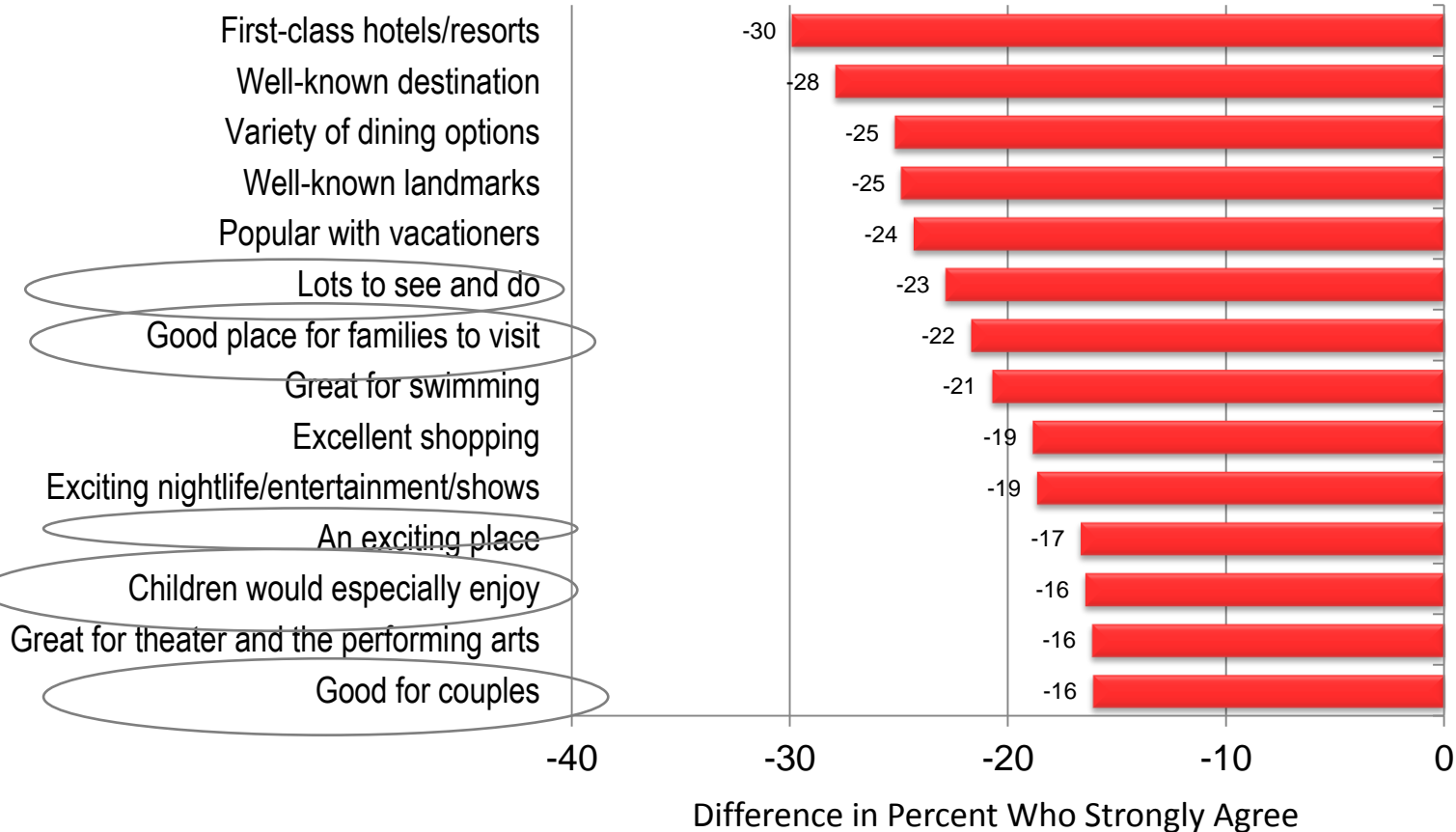
Base: Total Travelers



West Virginia Image Weaknesses vs. Virginia



Base: Total Travelers

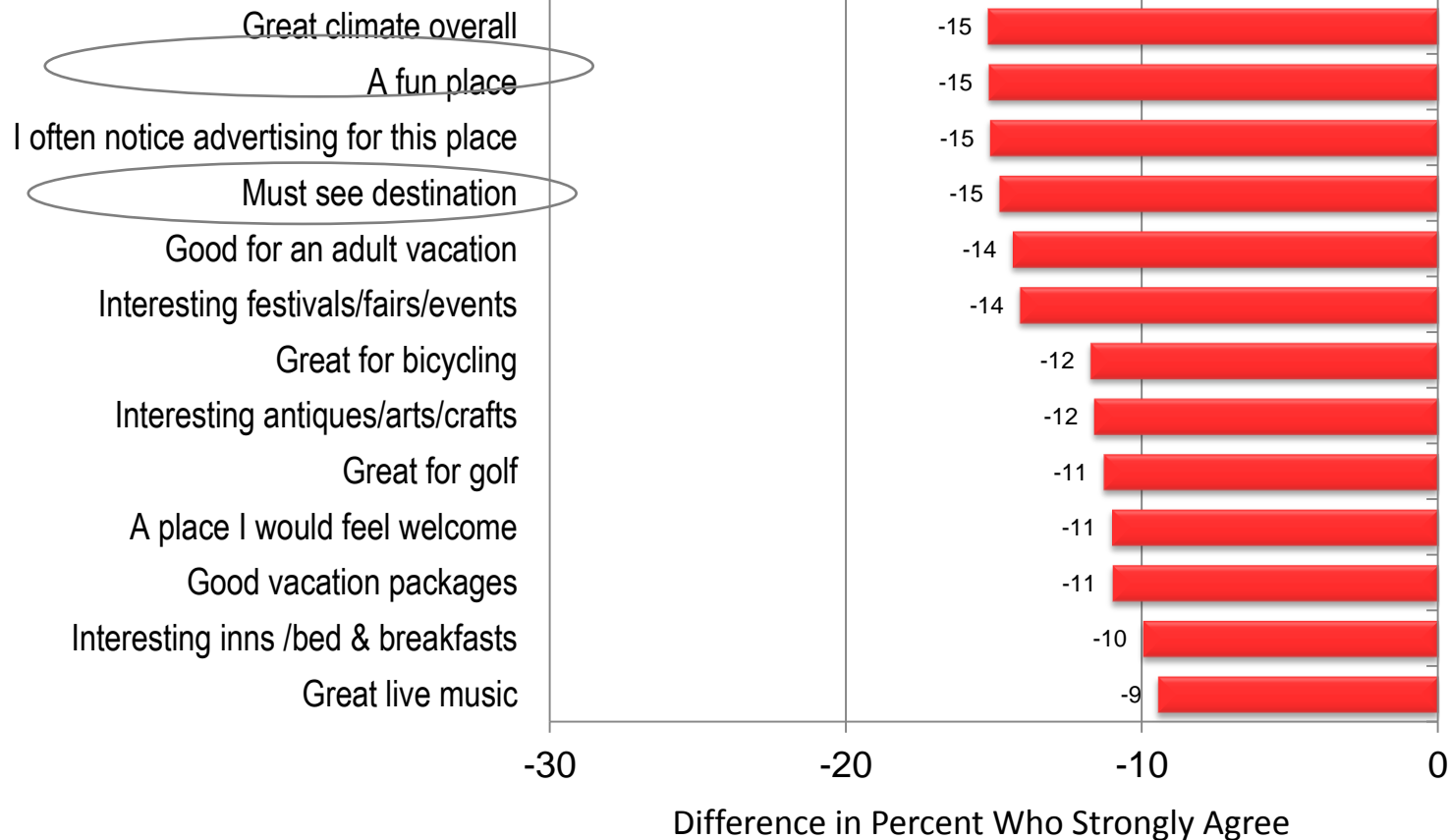


Note: Circled attributes are some of the most important image hot buttons for travelers

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



Base: Total Travelers

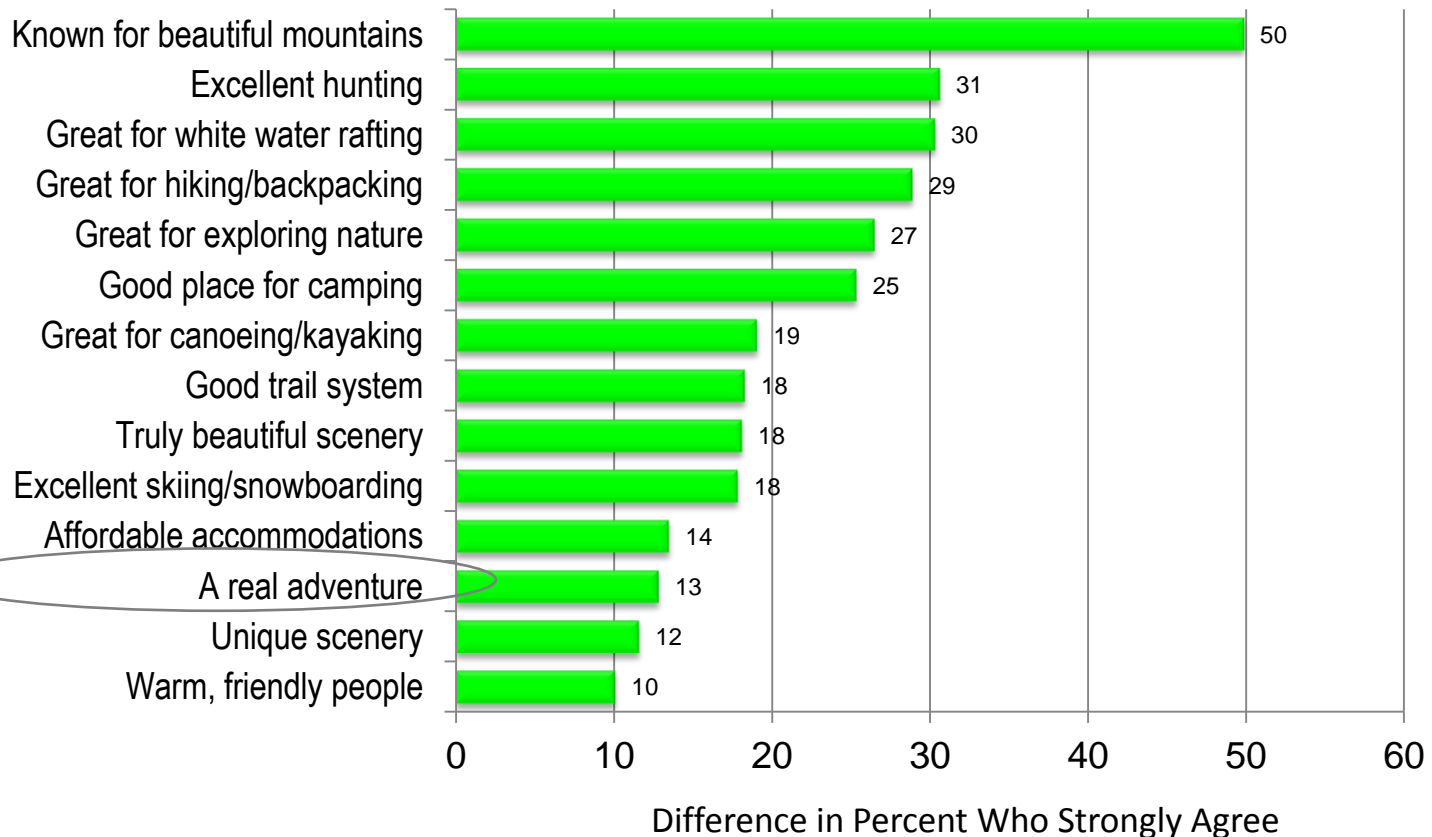


Note: Circled attributes are some of the most important image hot buttons for travelers

West Virginia Image Strengths vs. Maryland



Base: Total Travelers

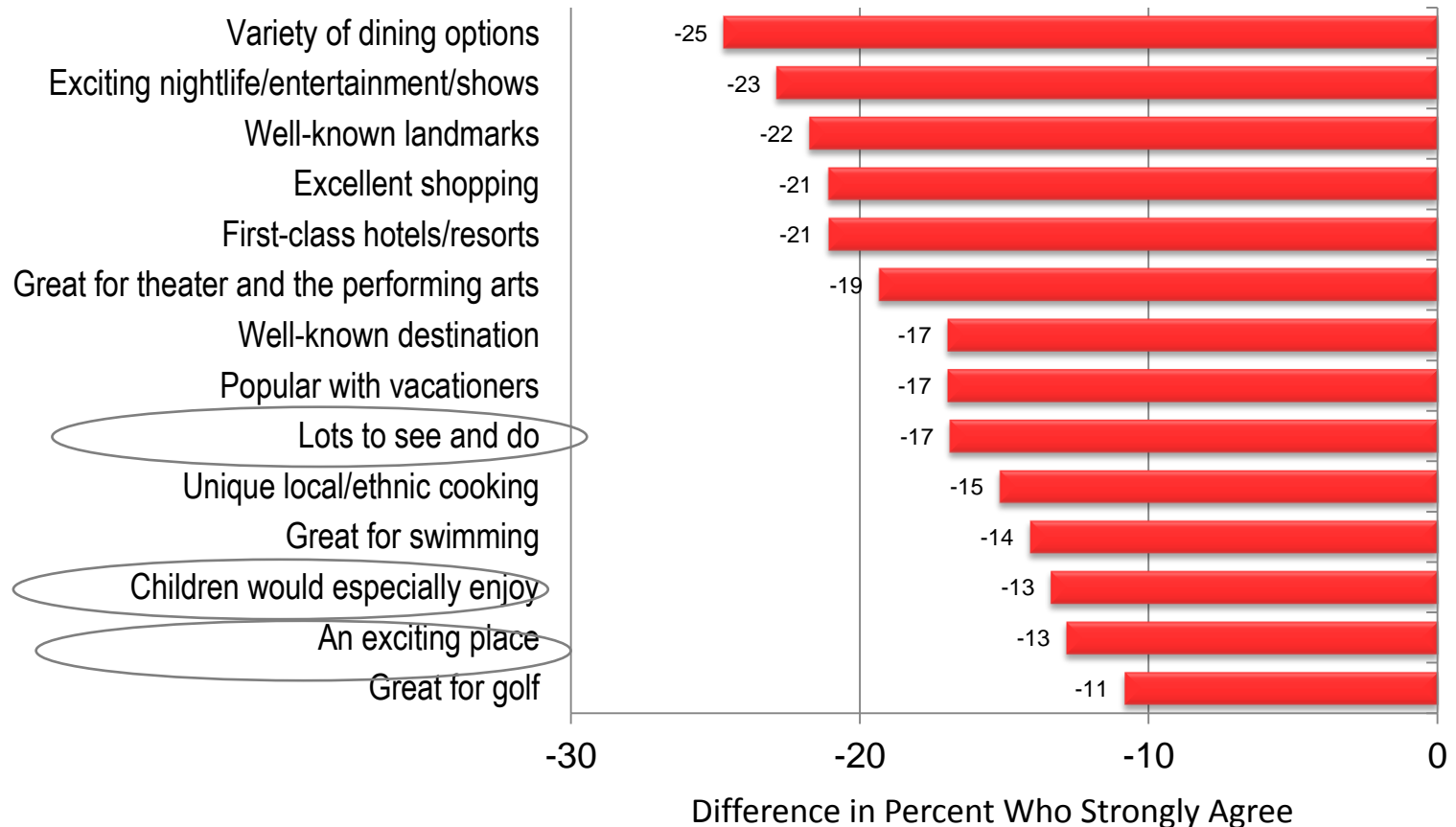


Note: Circled attributes are some of the most important image hot buttons for travelers

West Virginia Image Weaknesses vs. Maryland



Base: Total Travelers

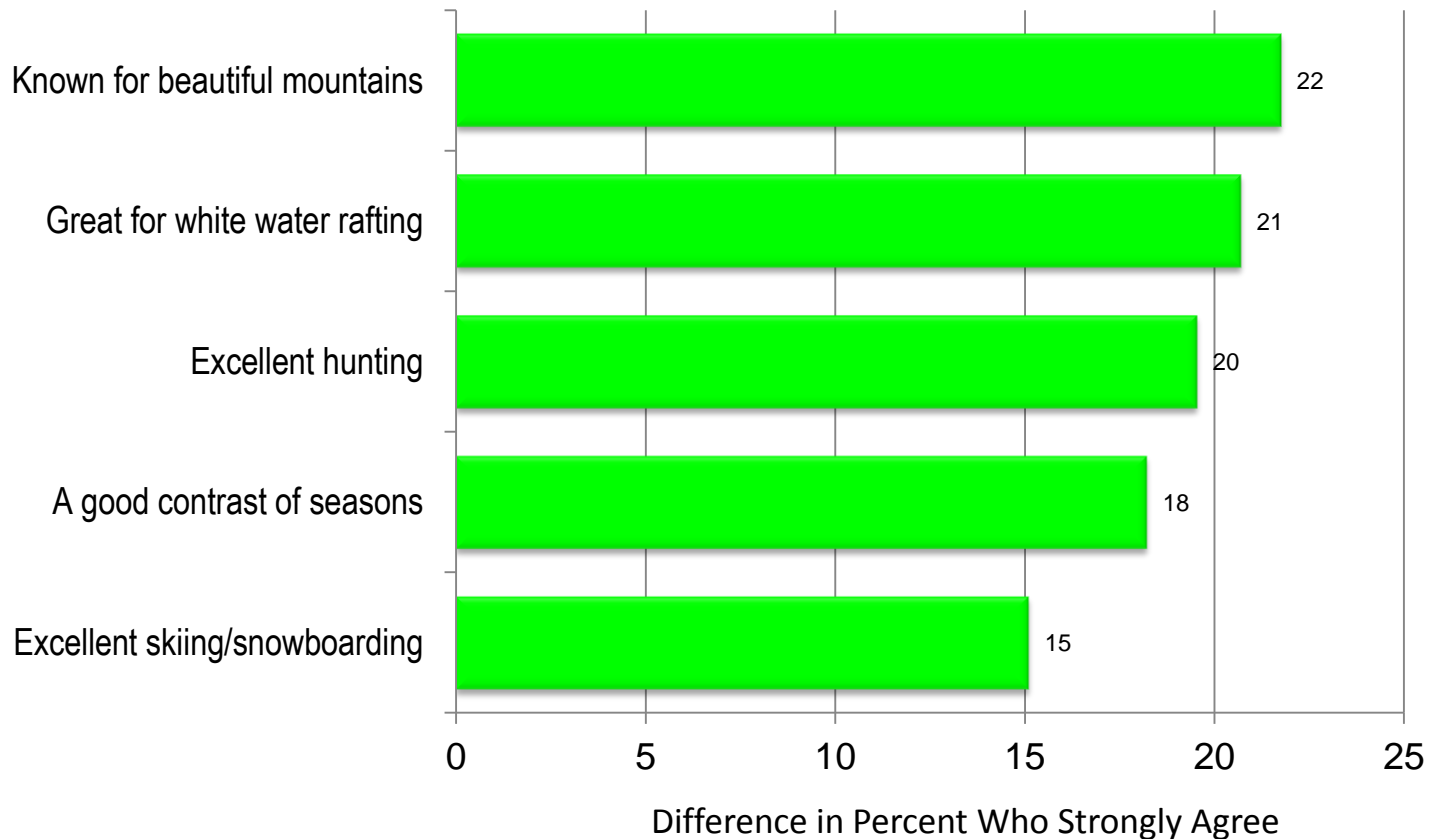


Note: Circled attributes are some of the most important image hot buttons for travelers

West Virginia Image Strengths vs. North Carolina



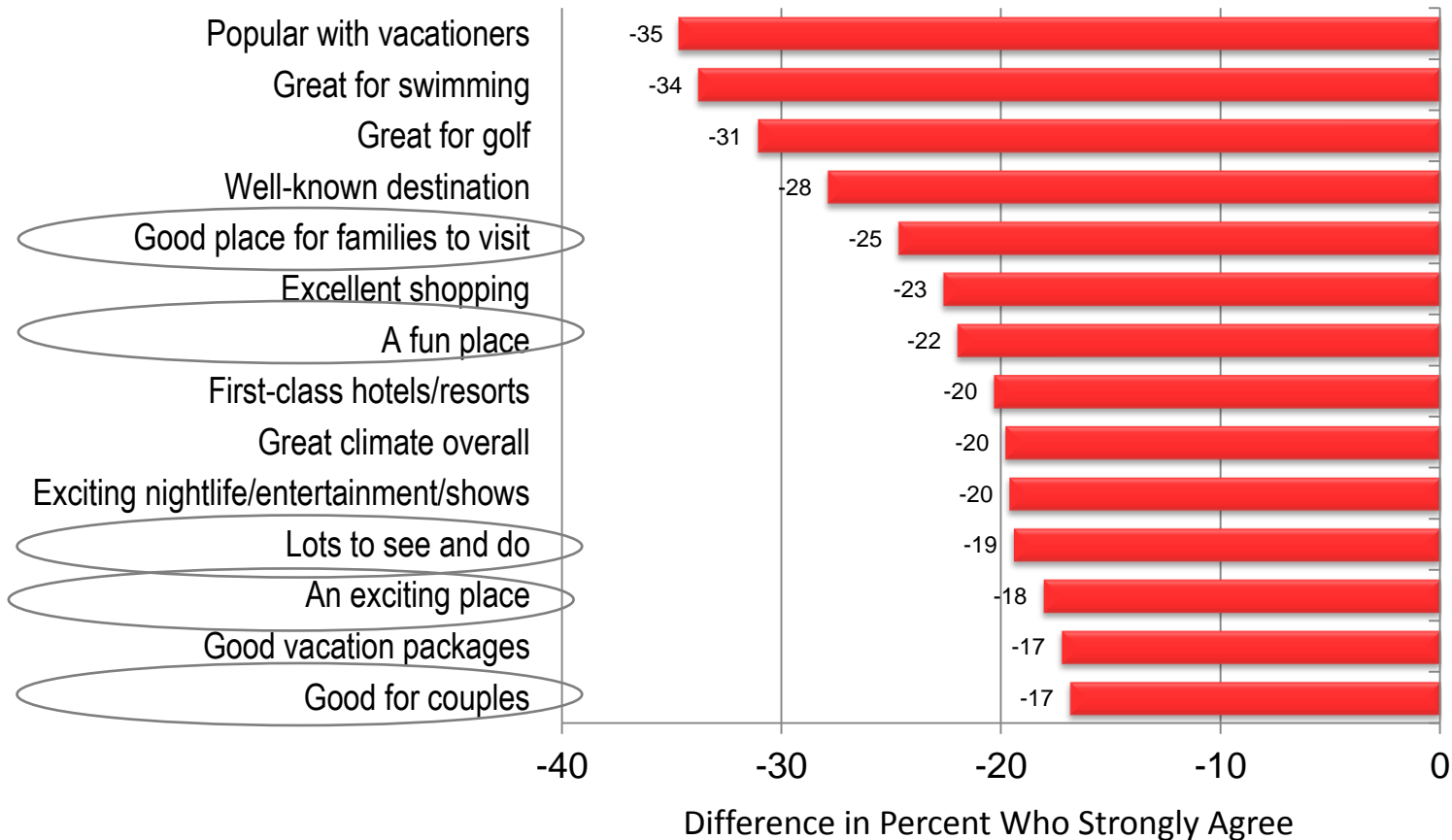
Base: Total Travelers



West Virginia Image Weaknesses vs. North Carolina



Base: Total Travelers

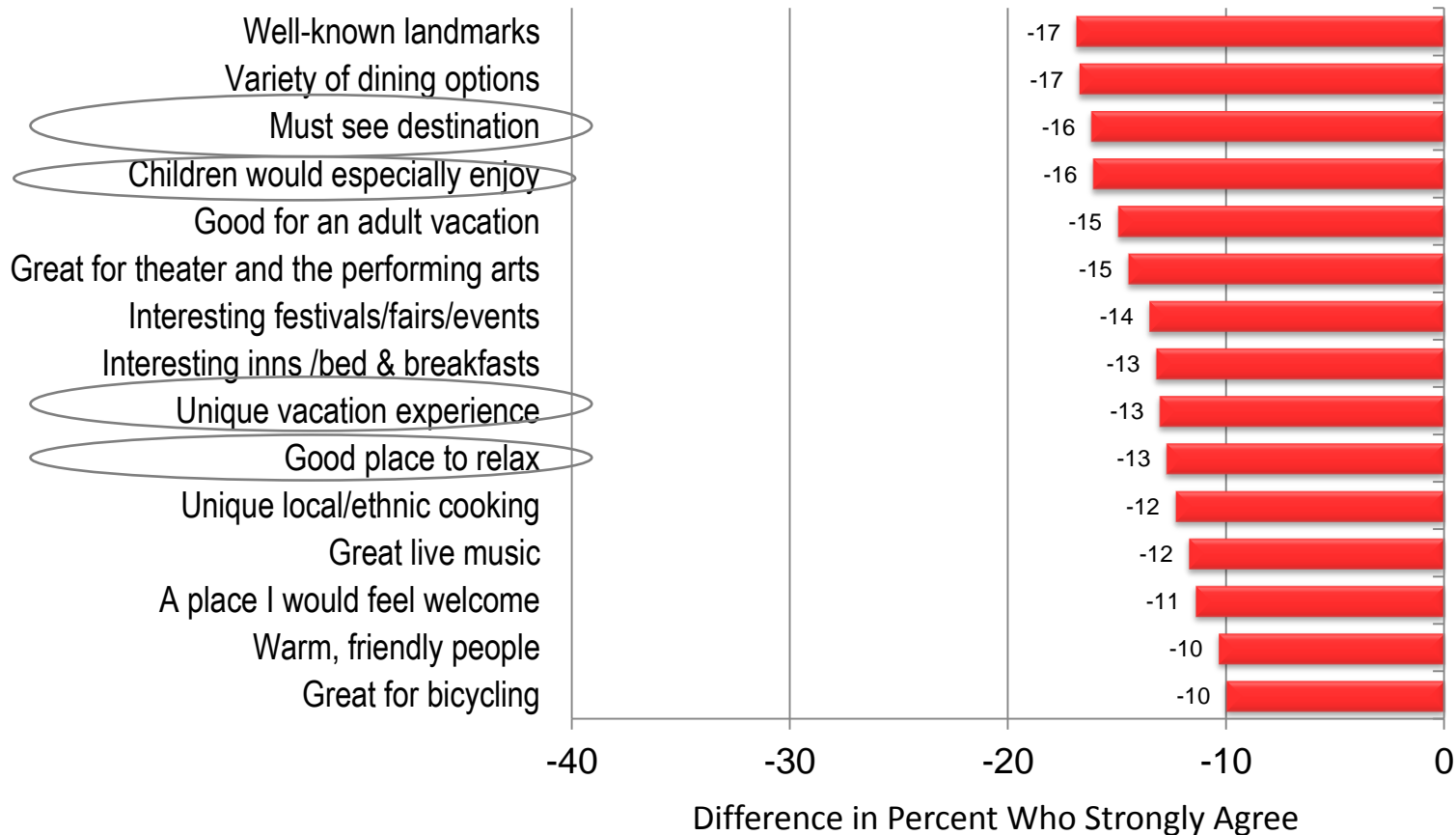


Note: Circled attributes are some of the most important image hot buttons for travelers

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



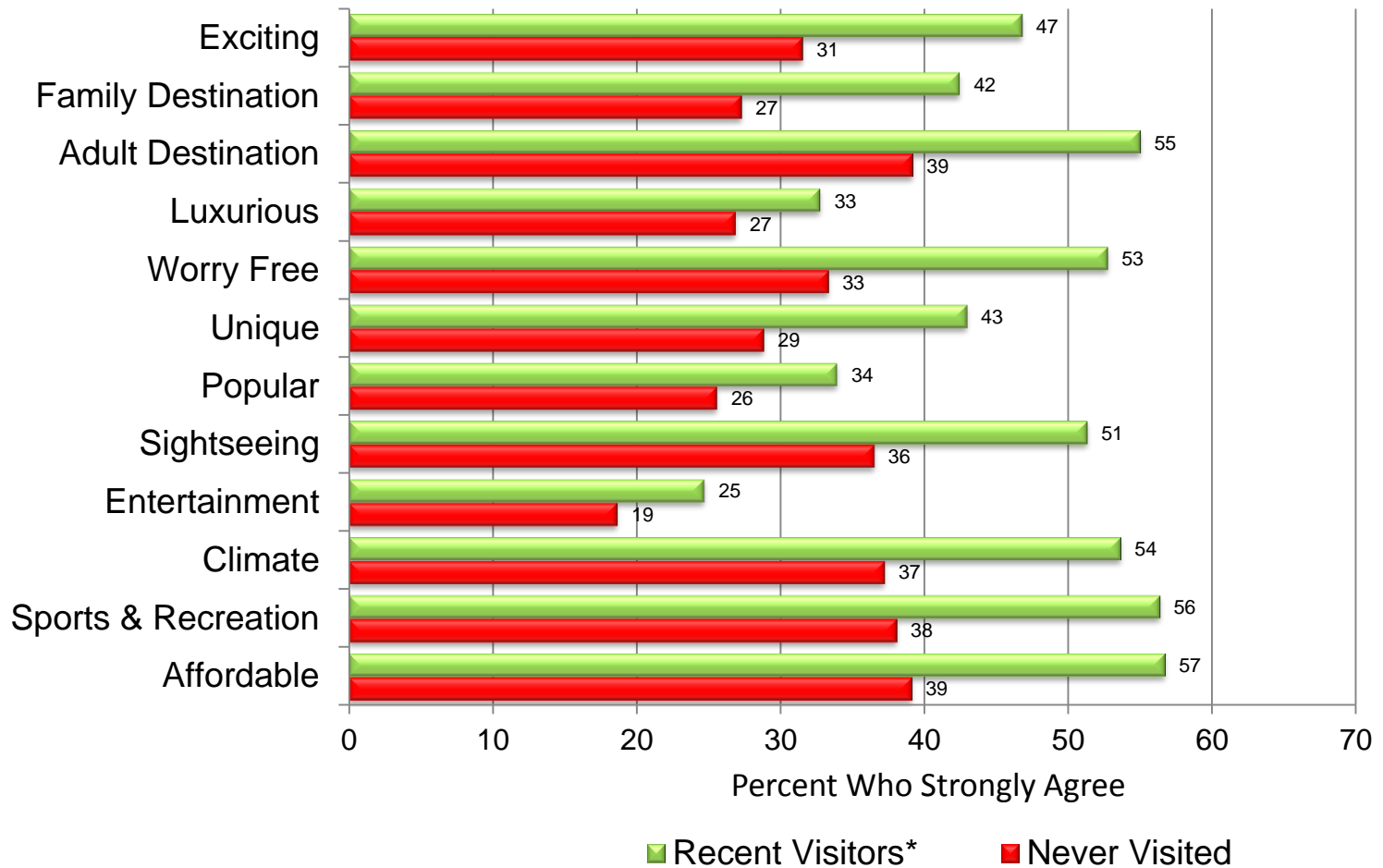
Base: Total Travelers



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

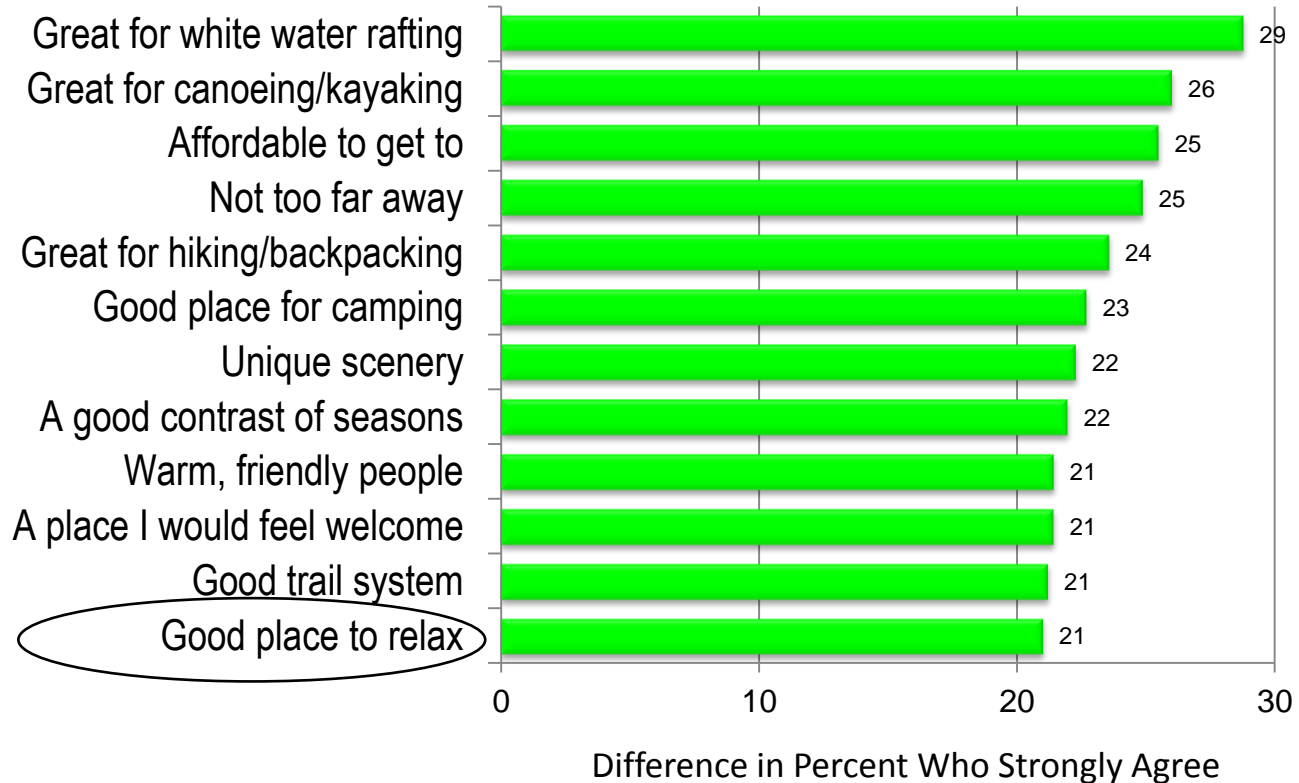
West Virginia's Product Delivery

West Virginia's Product vs. Image



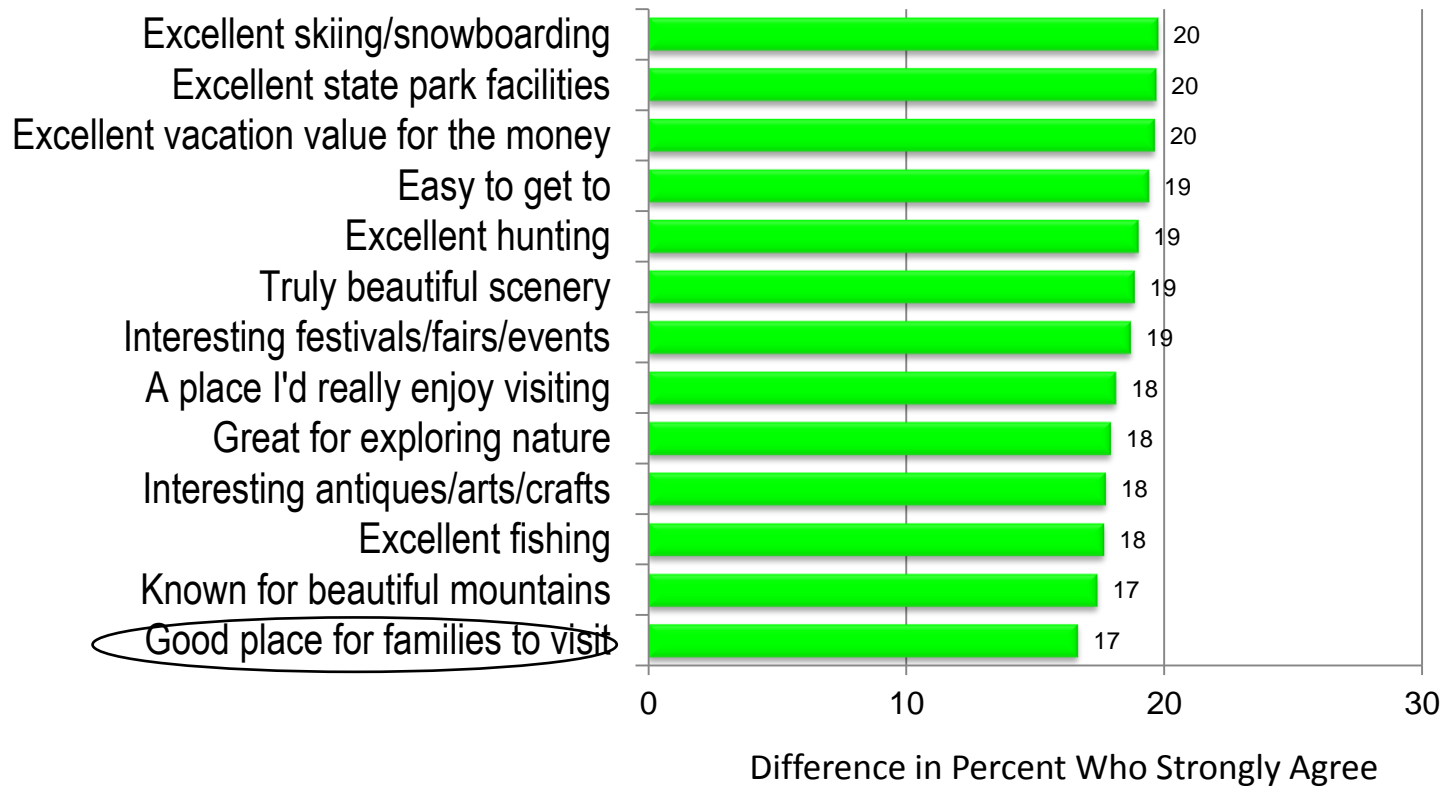
* Visited in the past 2 years

Top Product Strengths vs. Image



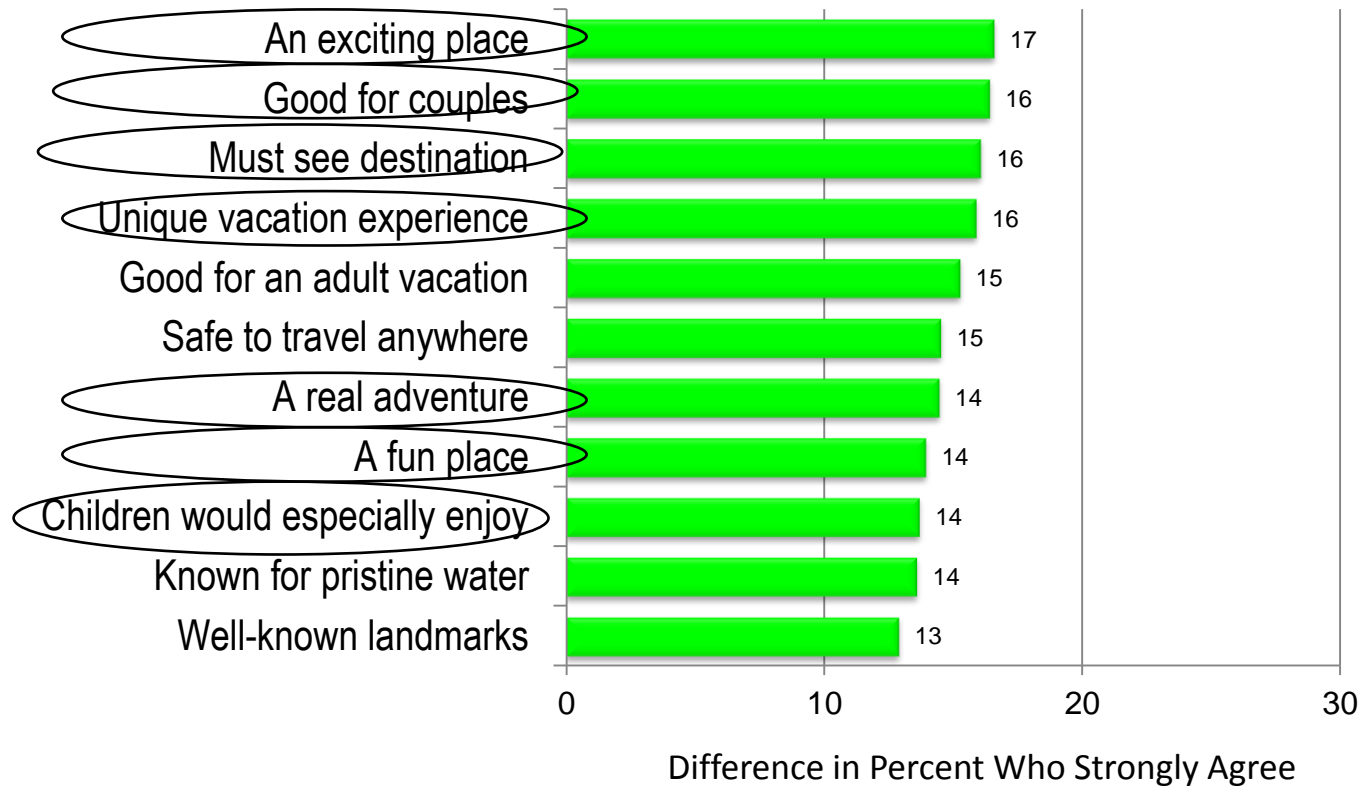
* Circled attributes are some of the most important image hot buttons for travelers

Top Product Strengths vs. Image (Cont'd)



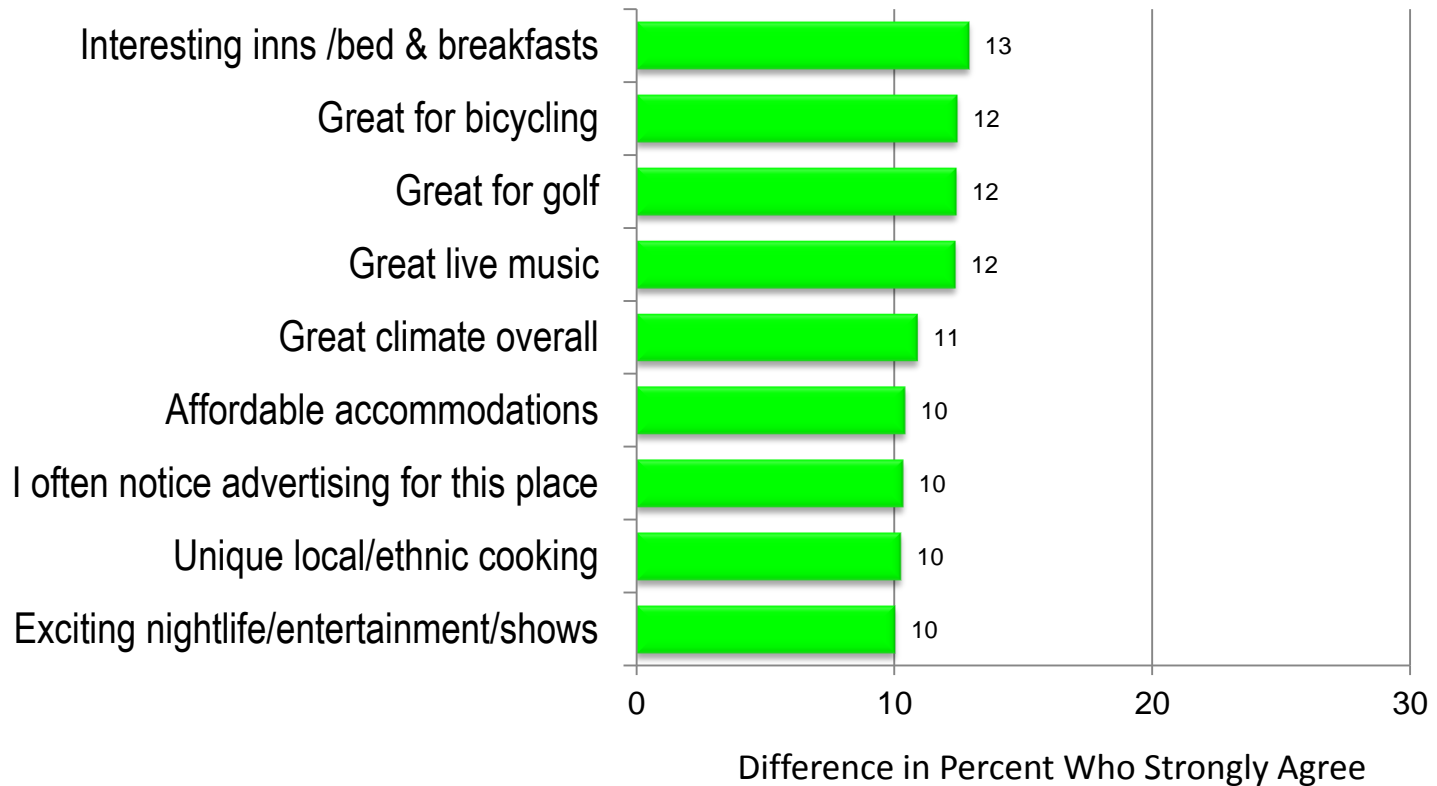
* Circled attributes are some of the most important image hot buttons for travelers

Top Product Strengths vs. Image (Cont'd)



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

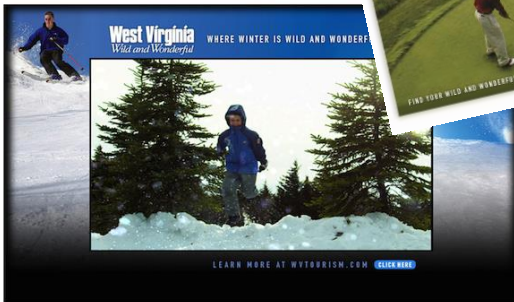
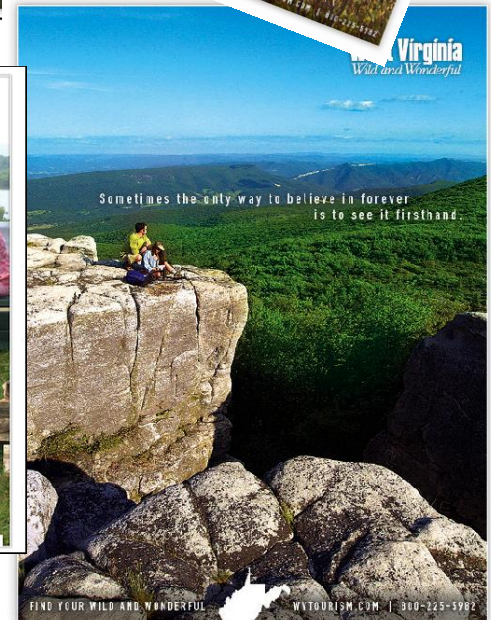
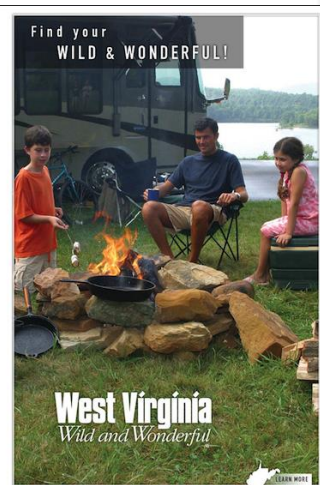
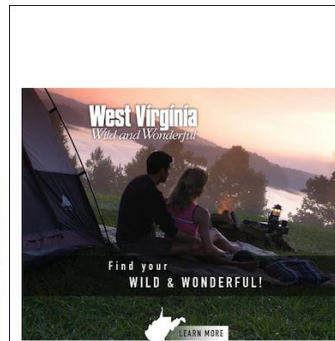
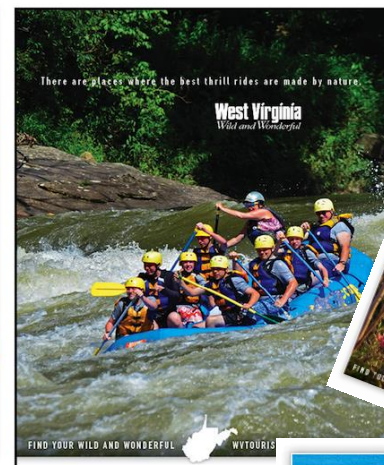
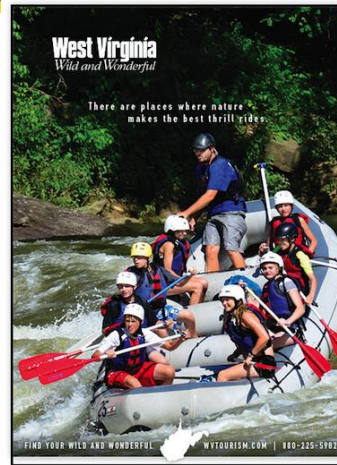
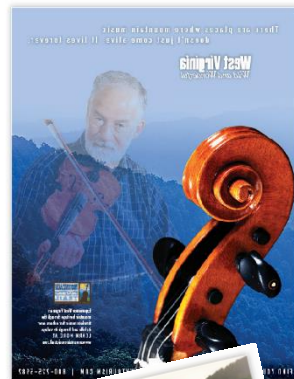
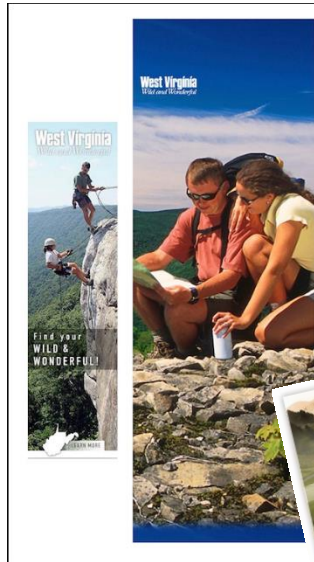
Top Product Strengths vs. Image (Cont'd)



West Virginia's 2014 Advertising Campaign

Creative

Longwoods INTERNATIONAL

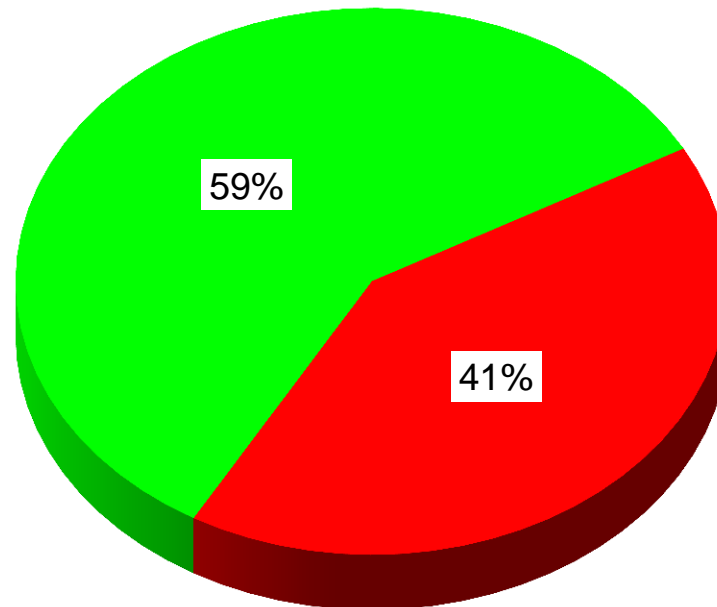


Advertising Awareness

Awareness of 2014 Advertising



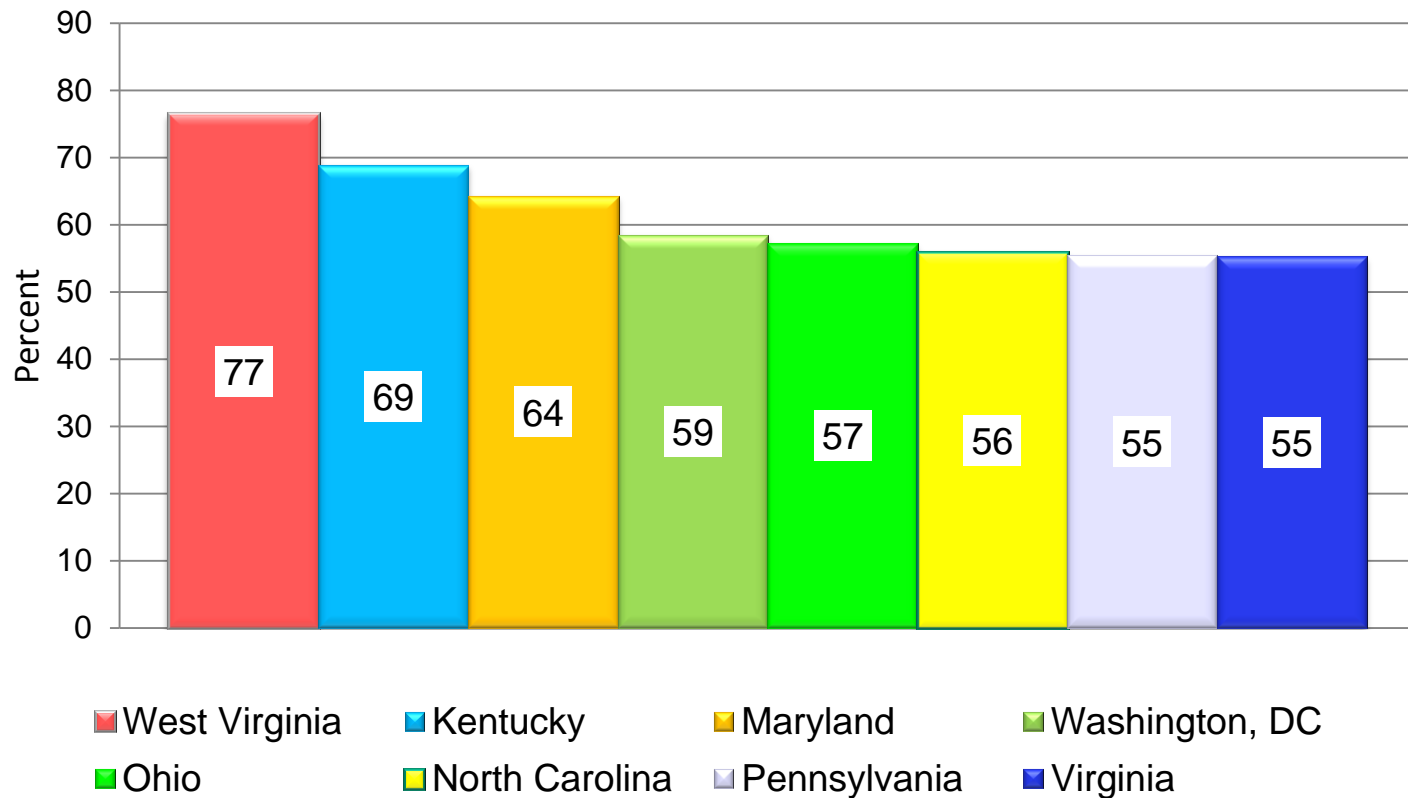
Base: Total Region



■ Aware

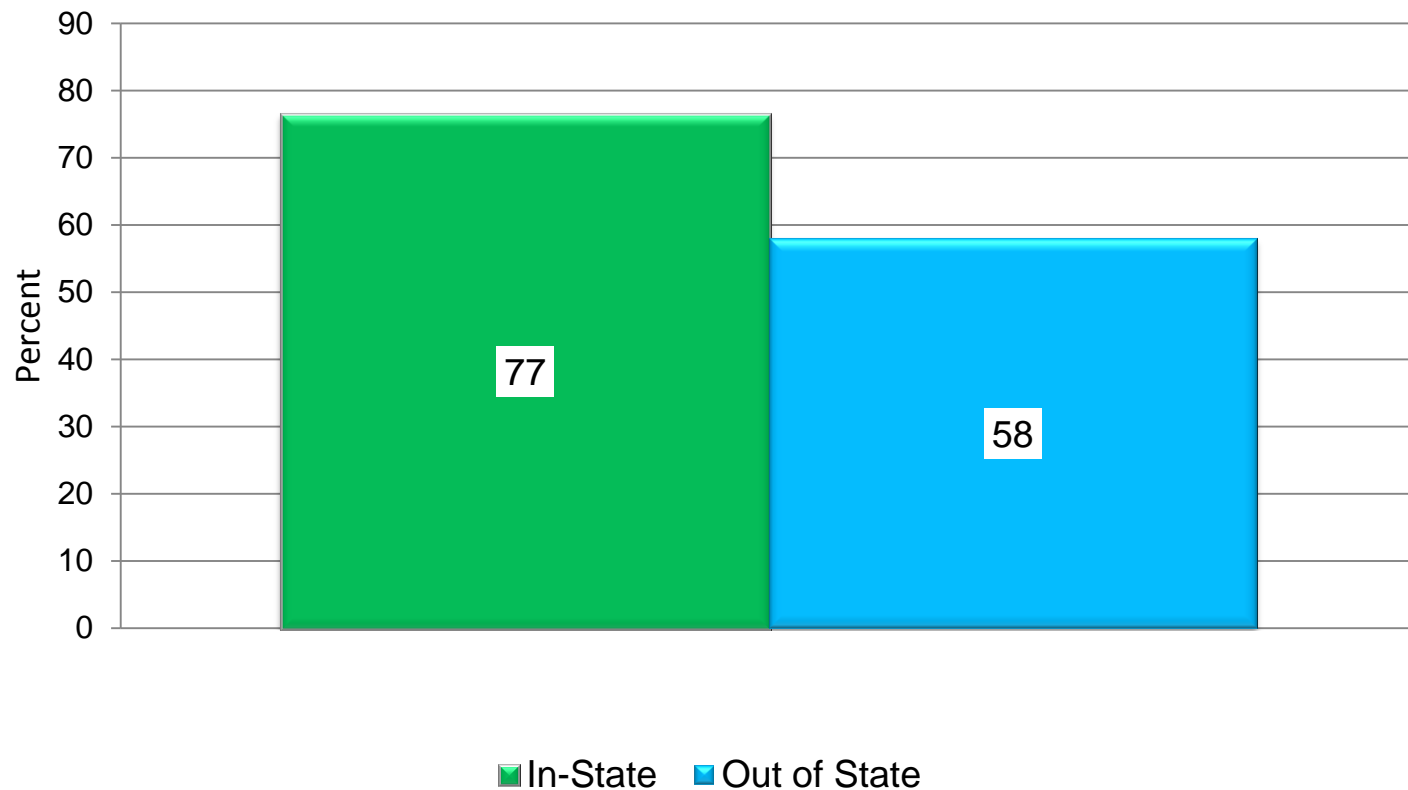
■ Unaware

Awareness* by Advertising Market



*Saw at least one ad

Awareness* In-State vs. Out of State

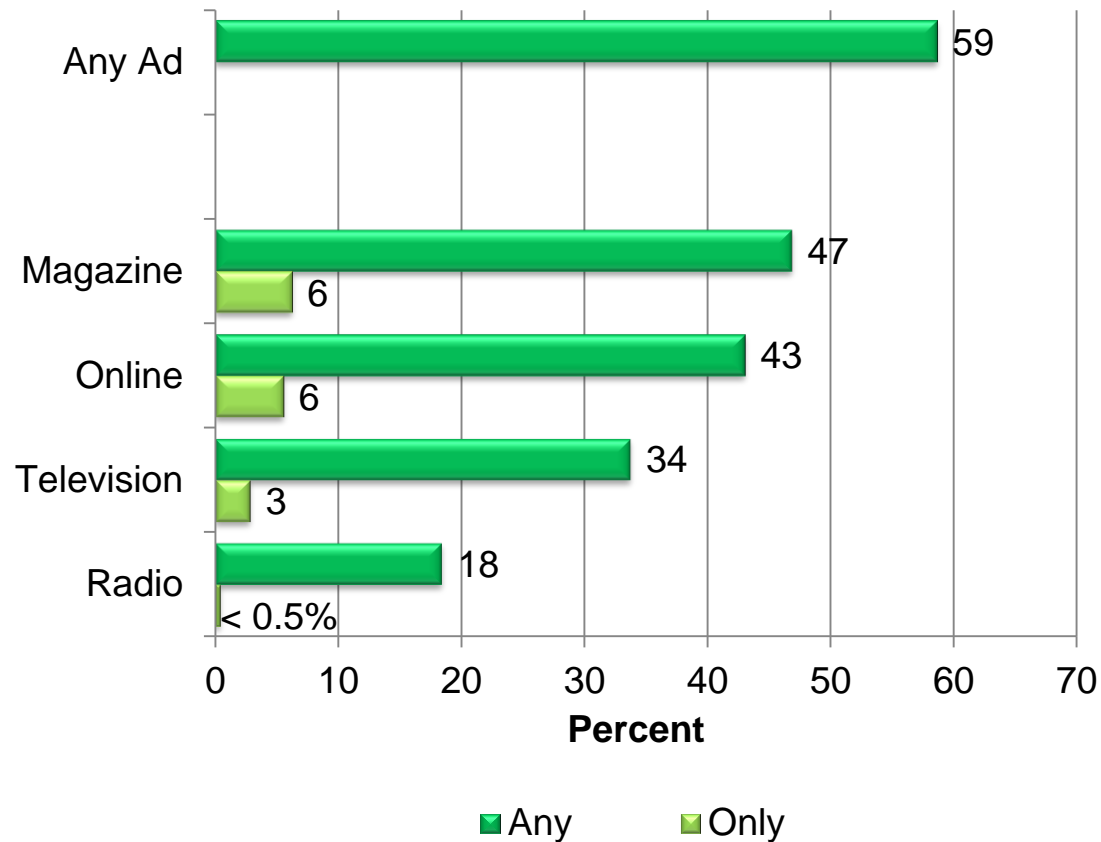


*Saw at least one ad

Awareness by Type of Media



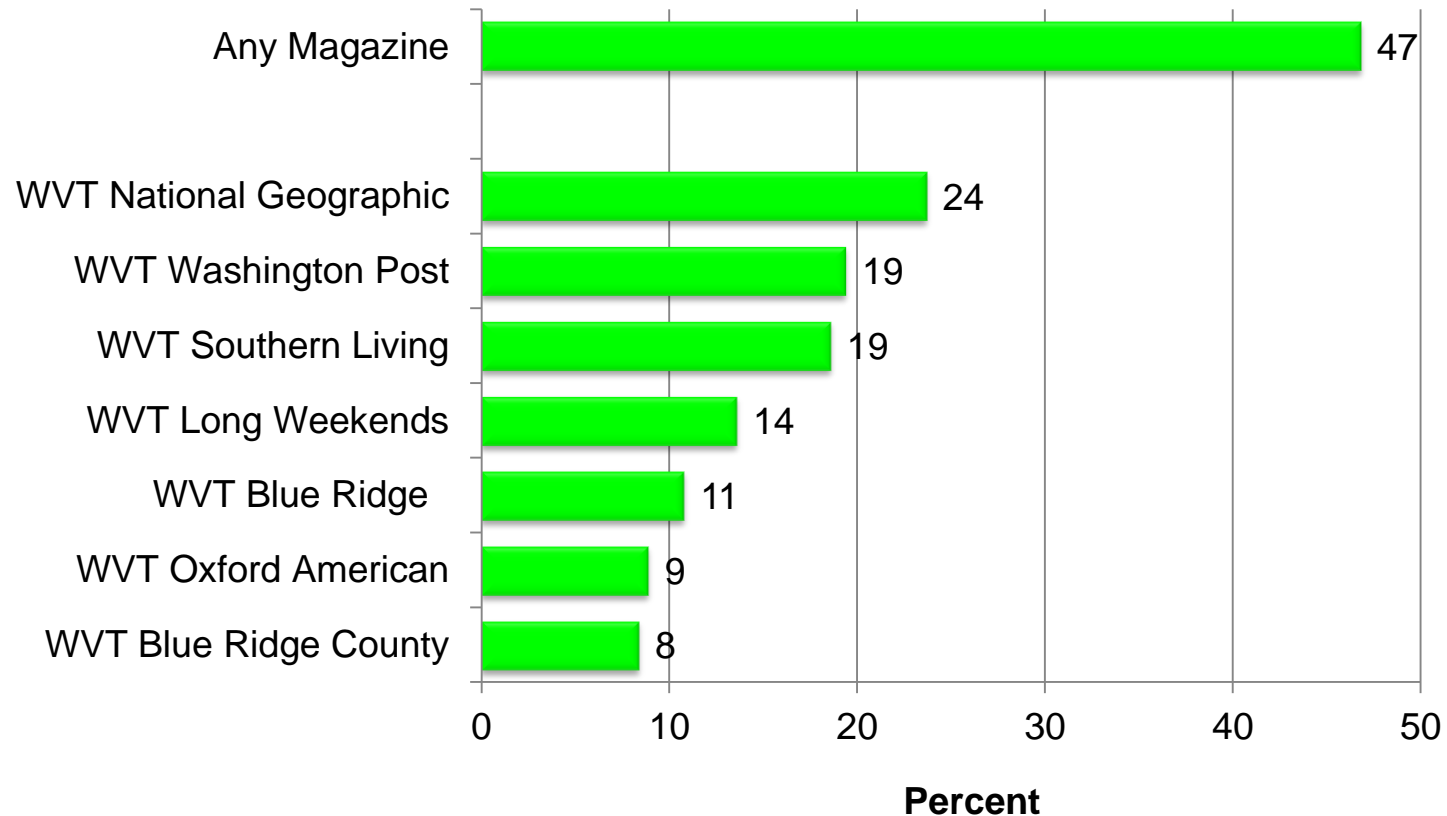
Base: Total Travelers



Awareness of Individual Ads — Magazine



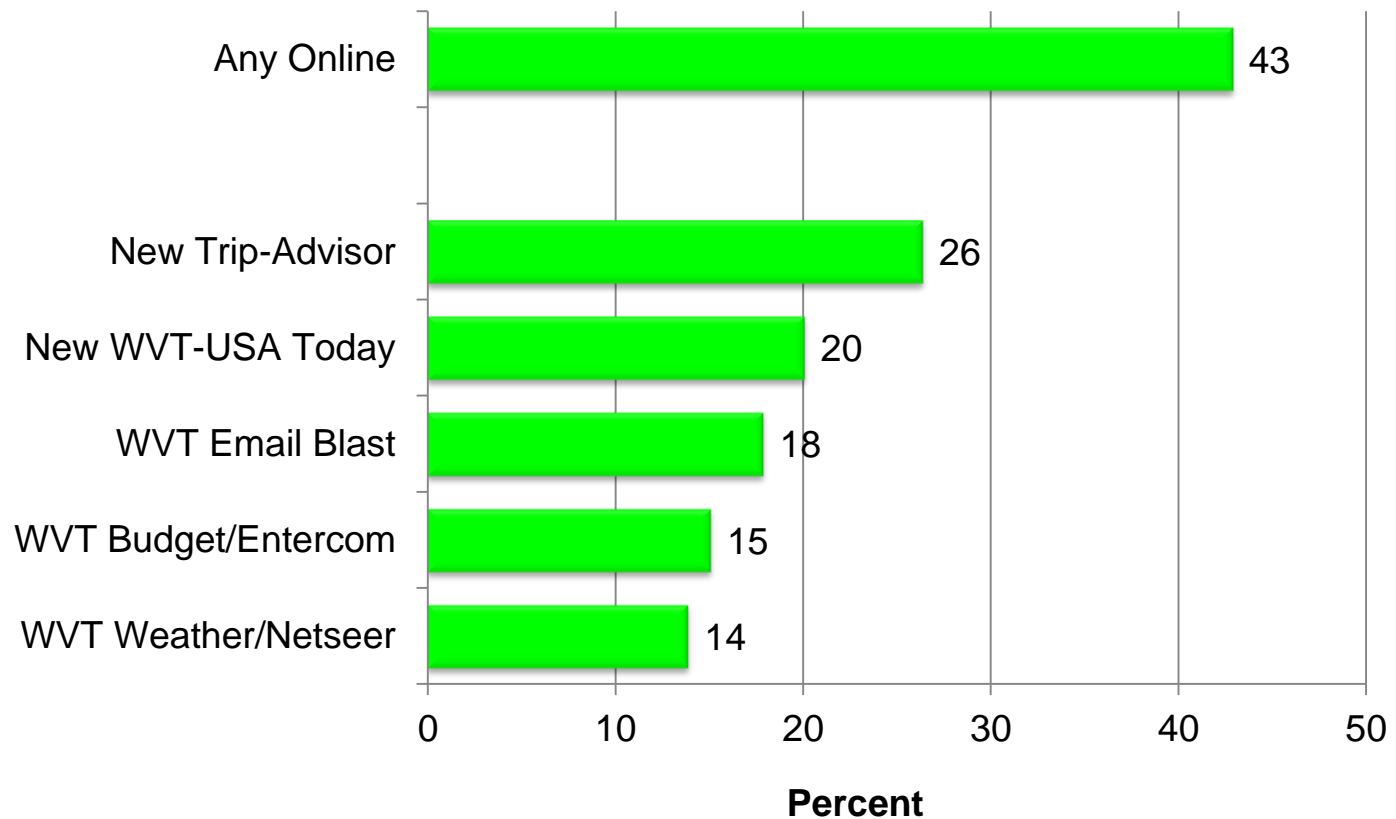
Base: Total Travelers



Awareness of Individual Ads — Online



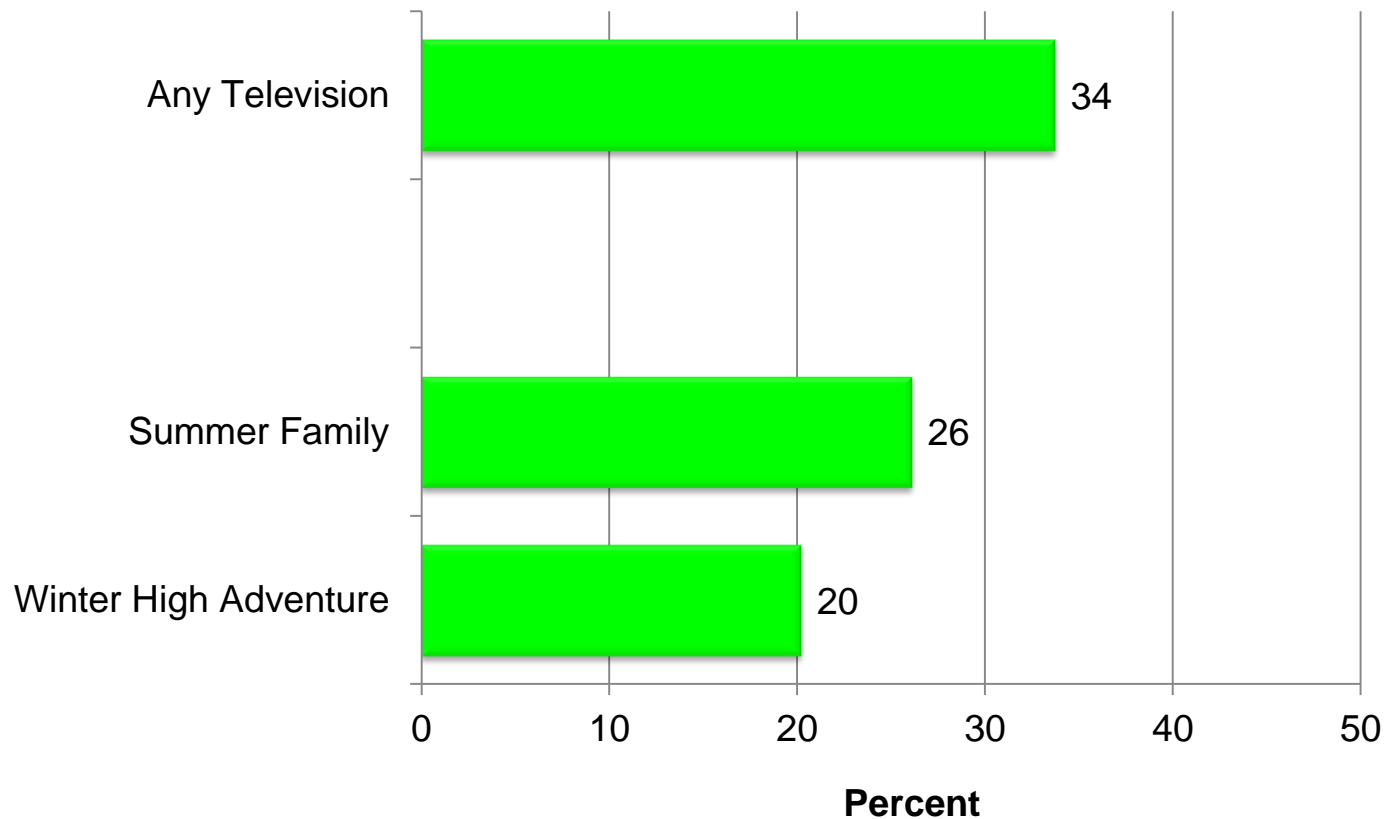
Base: Total Travelers



Awareness of Individual Ads — Television



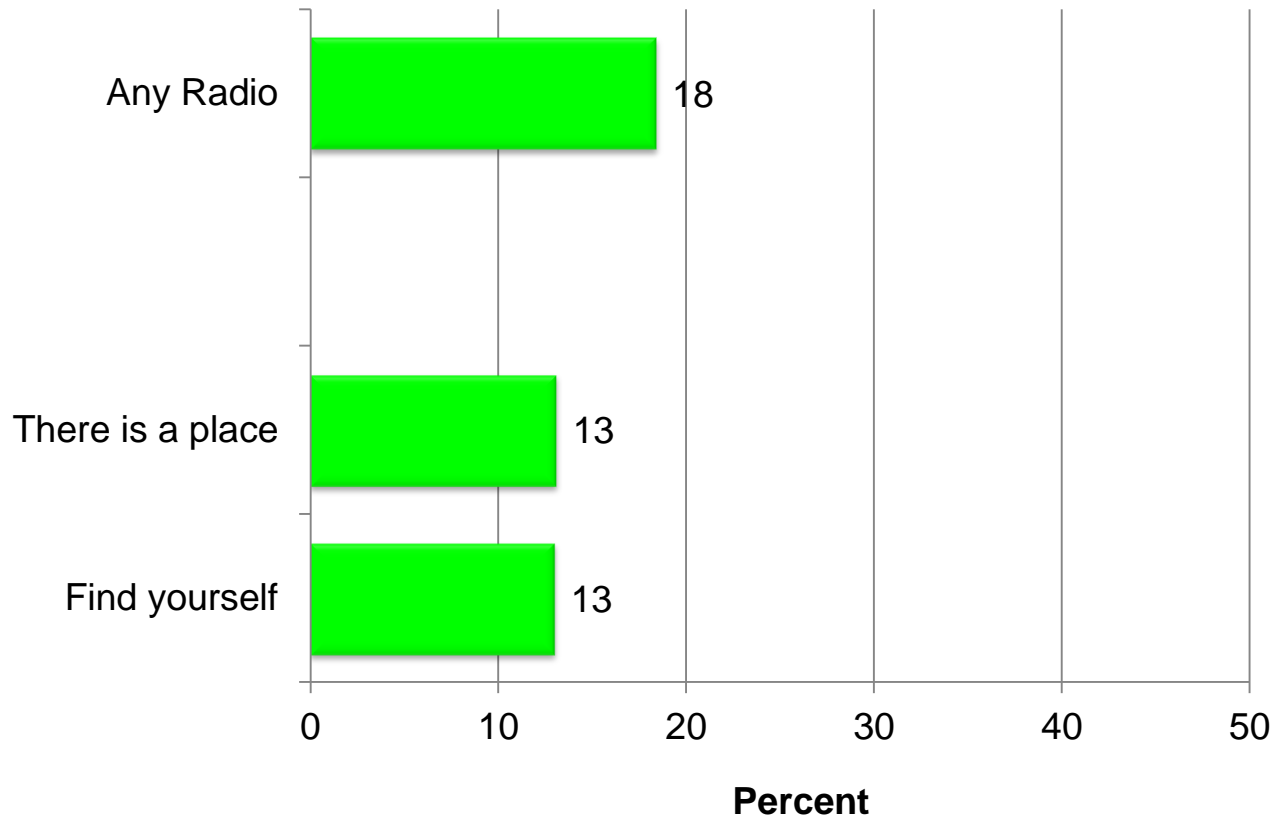
Base: Total Travelers



Awareness of Individual Ads — Radio



Base: Total Travelers

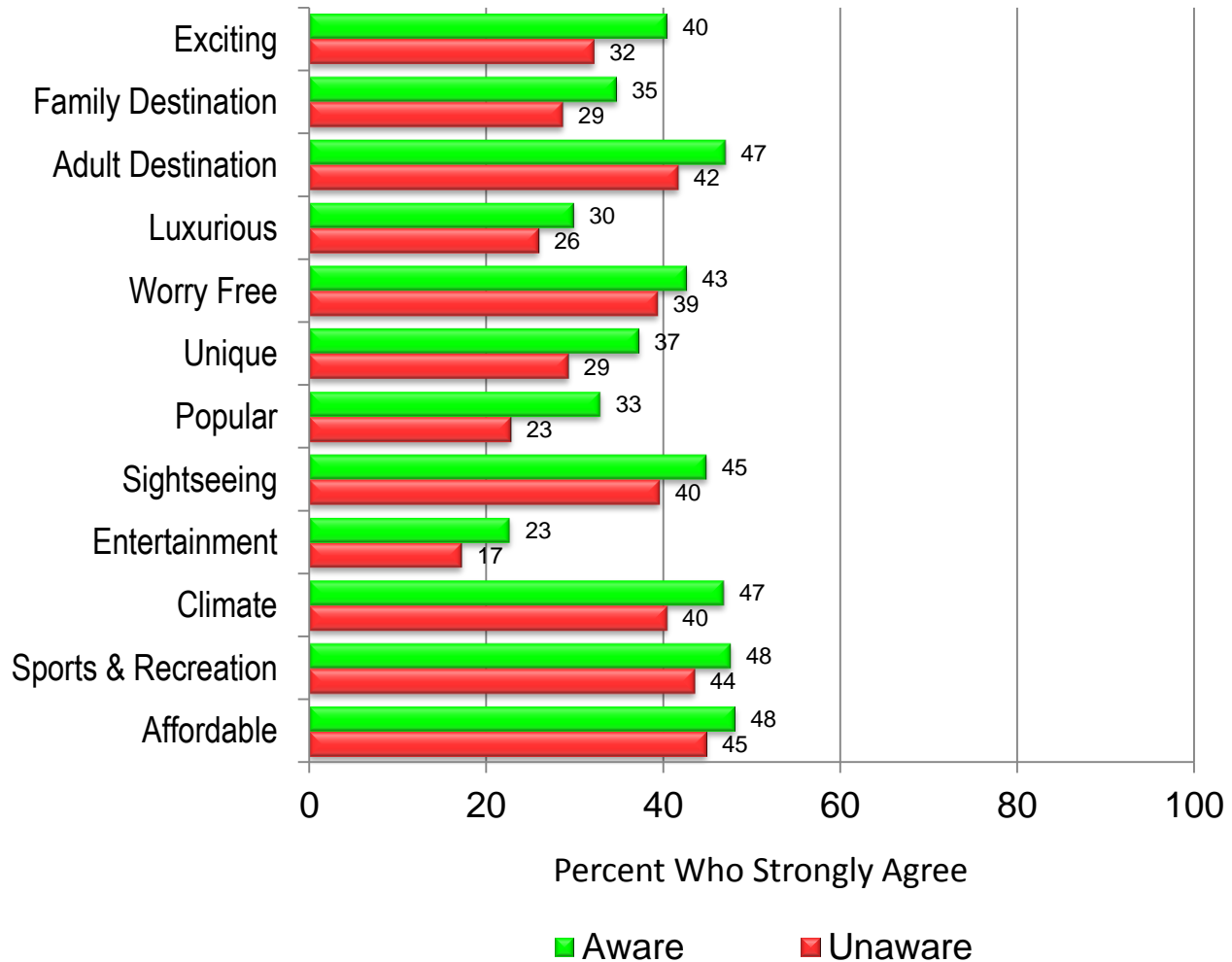


Impact of the 2014 Advertising Campaign on West Virginia's Image

Impact of 2014 Advertising on West Virginia's Image



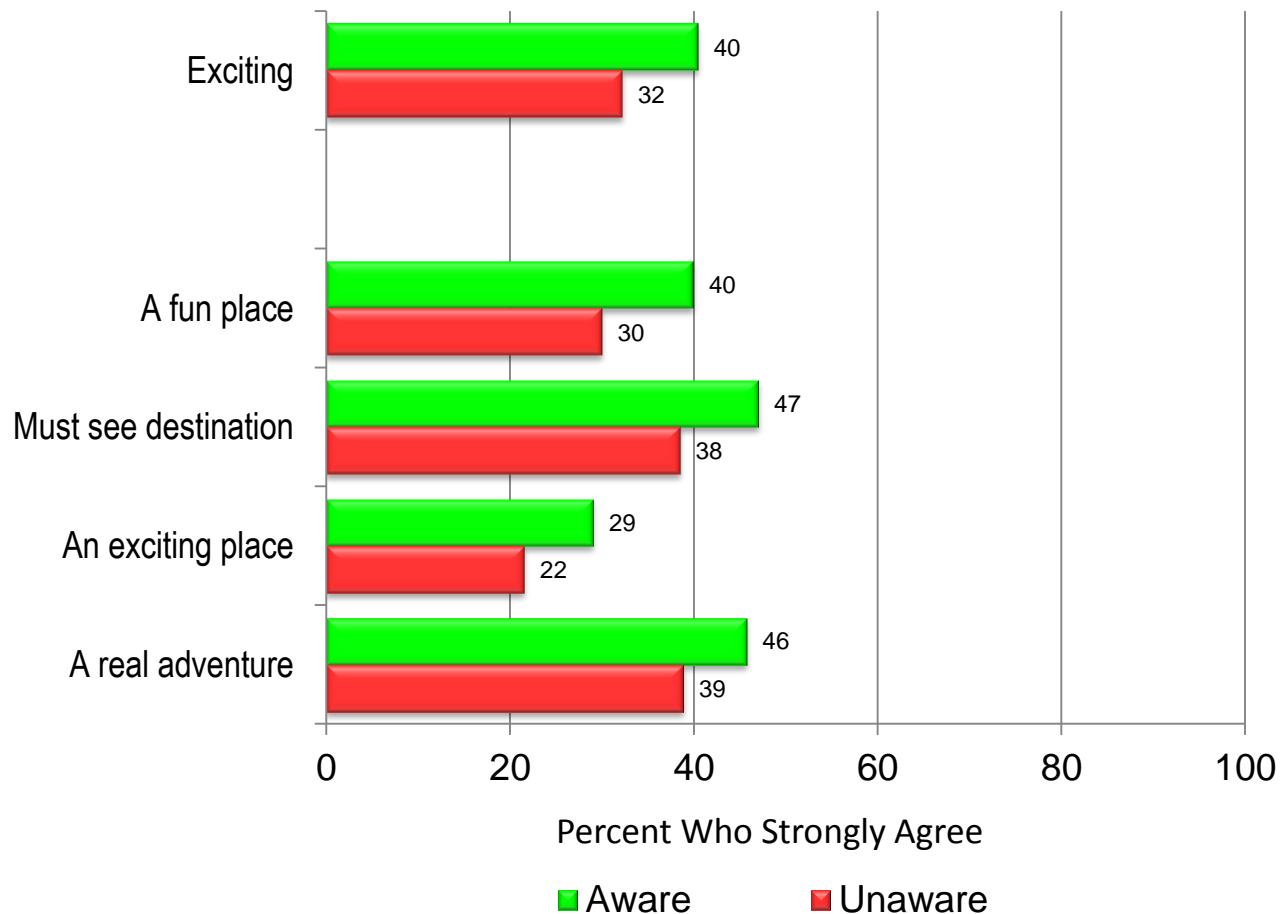
Base: Total Travelers



West Virginia's Image — Exciting



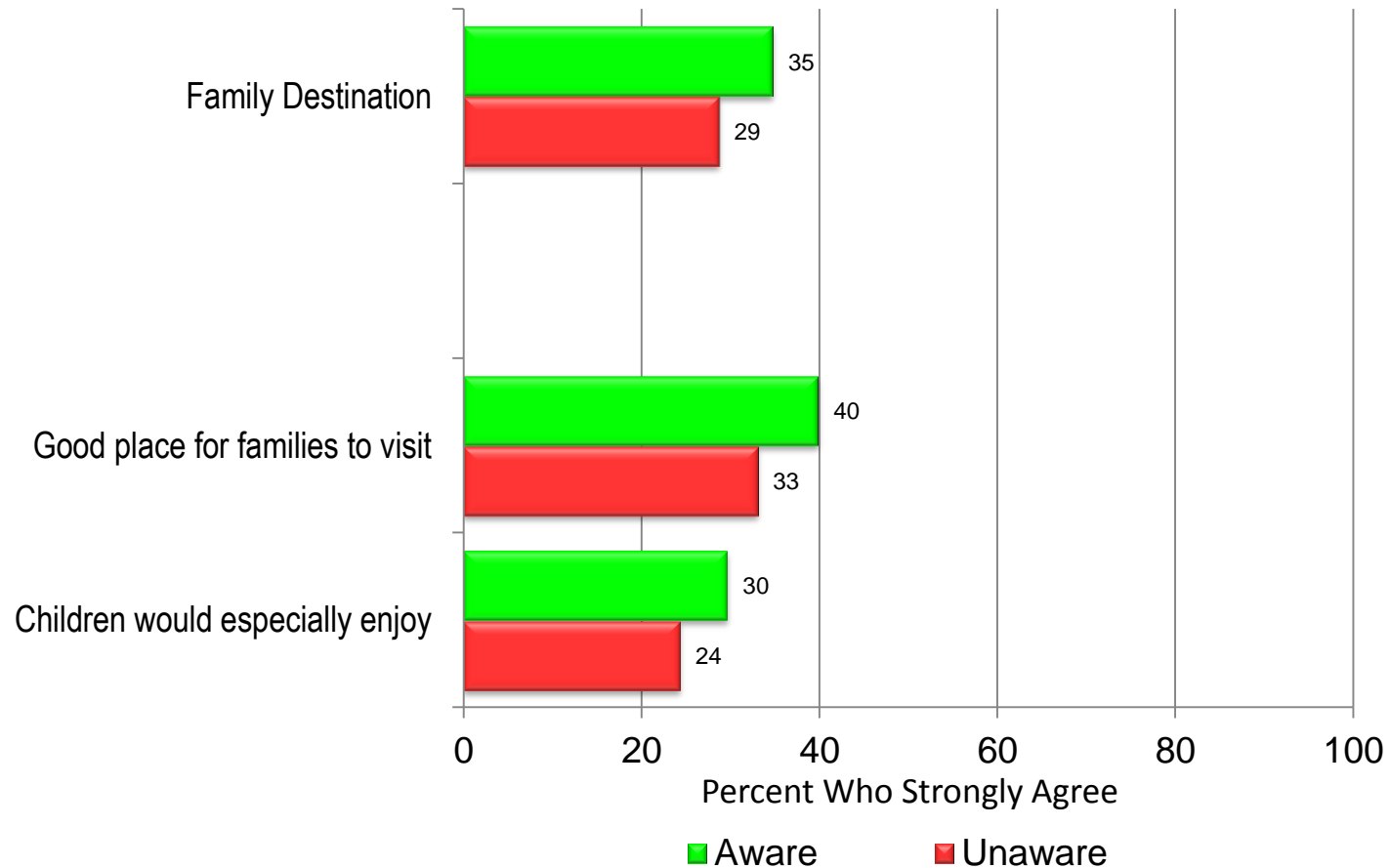
Base: Total Travelers



West Virginia's Image — Family Destination



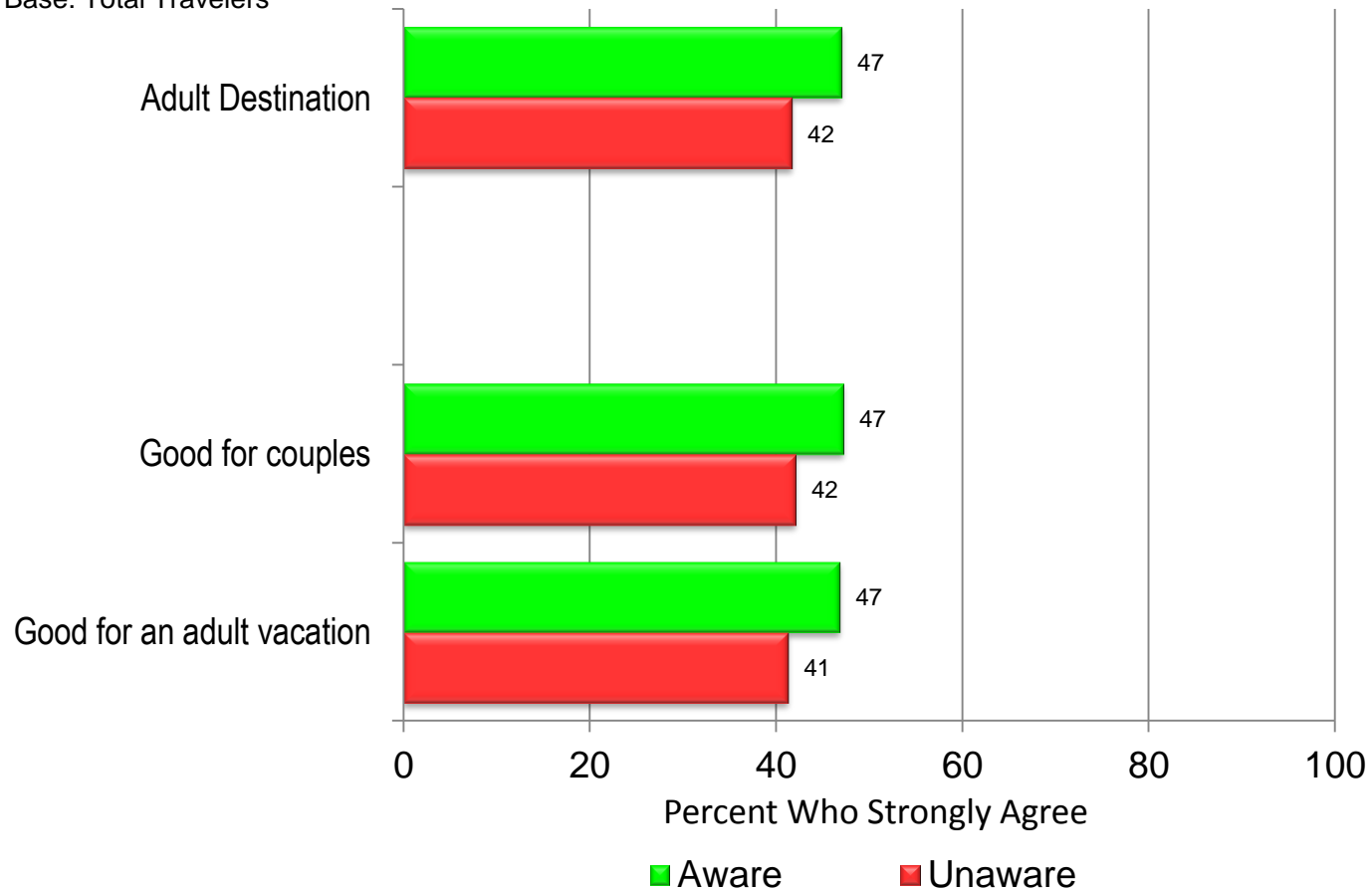
Base: Total Travelers



West Virginia's Image — Adult Destination



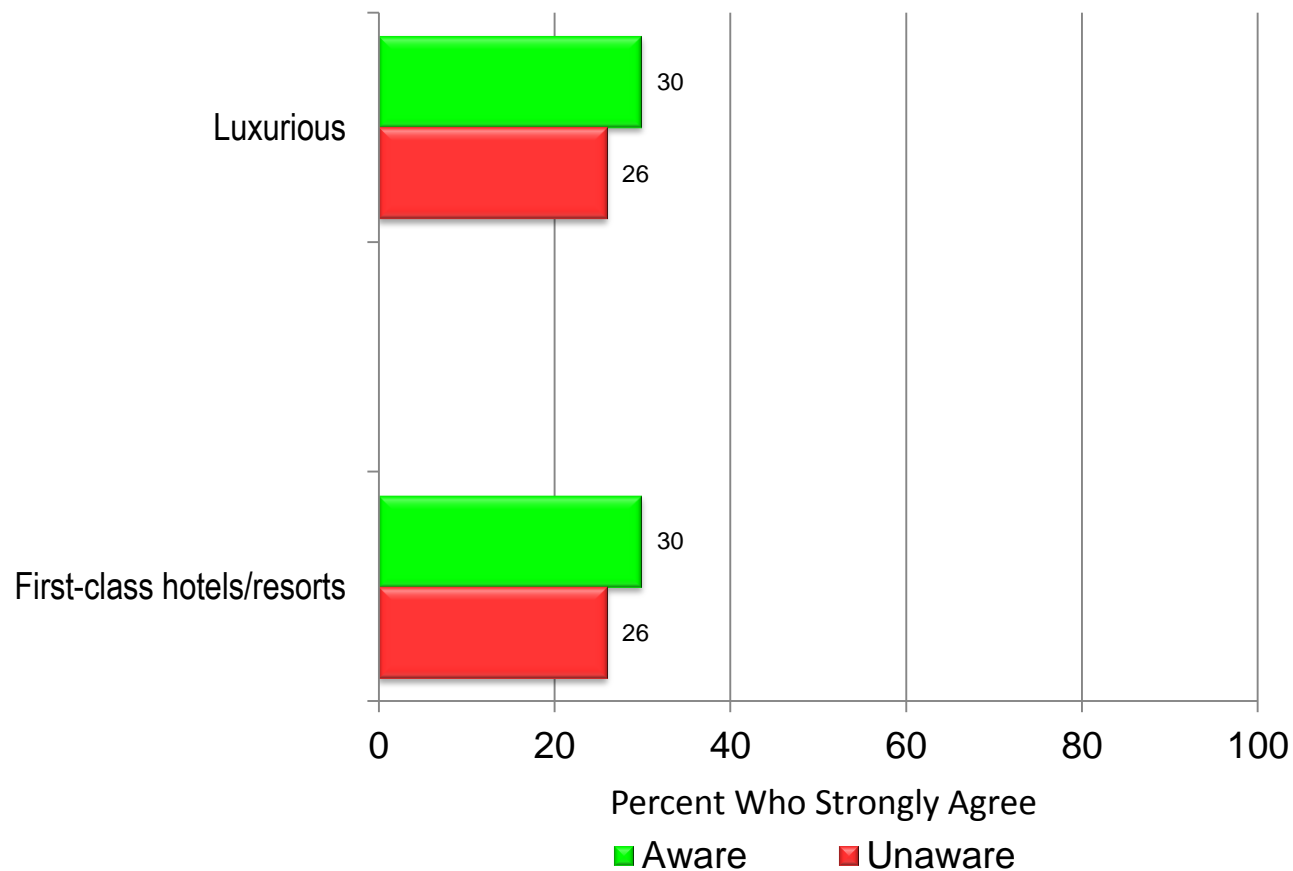
Base: Total Travelers



West Virginia's Image — Luxurious



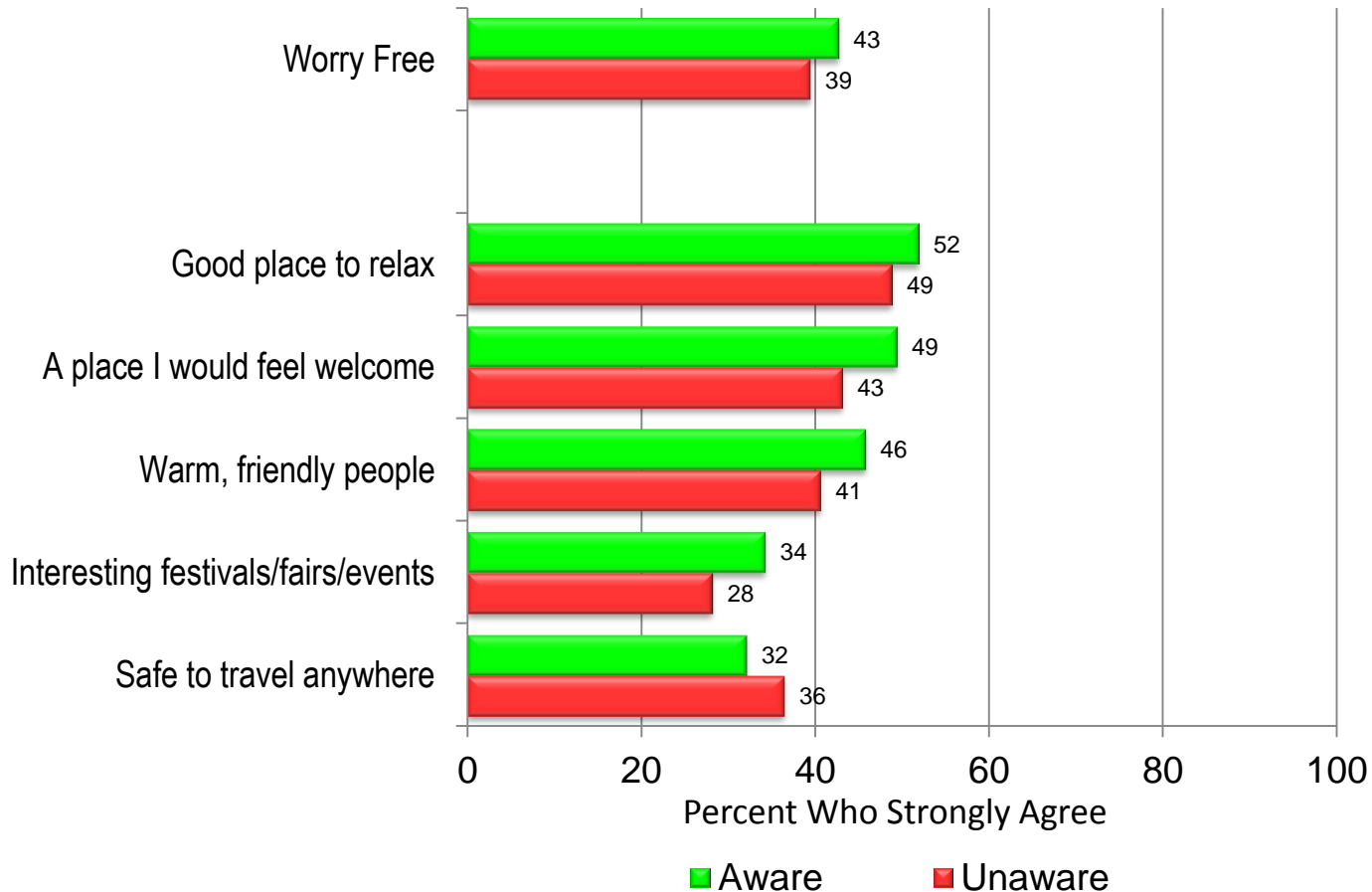
Base: Total Travelers



West Virginia's Image — Worry Free



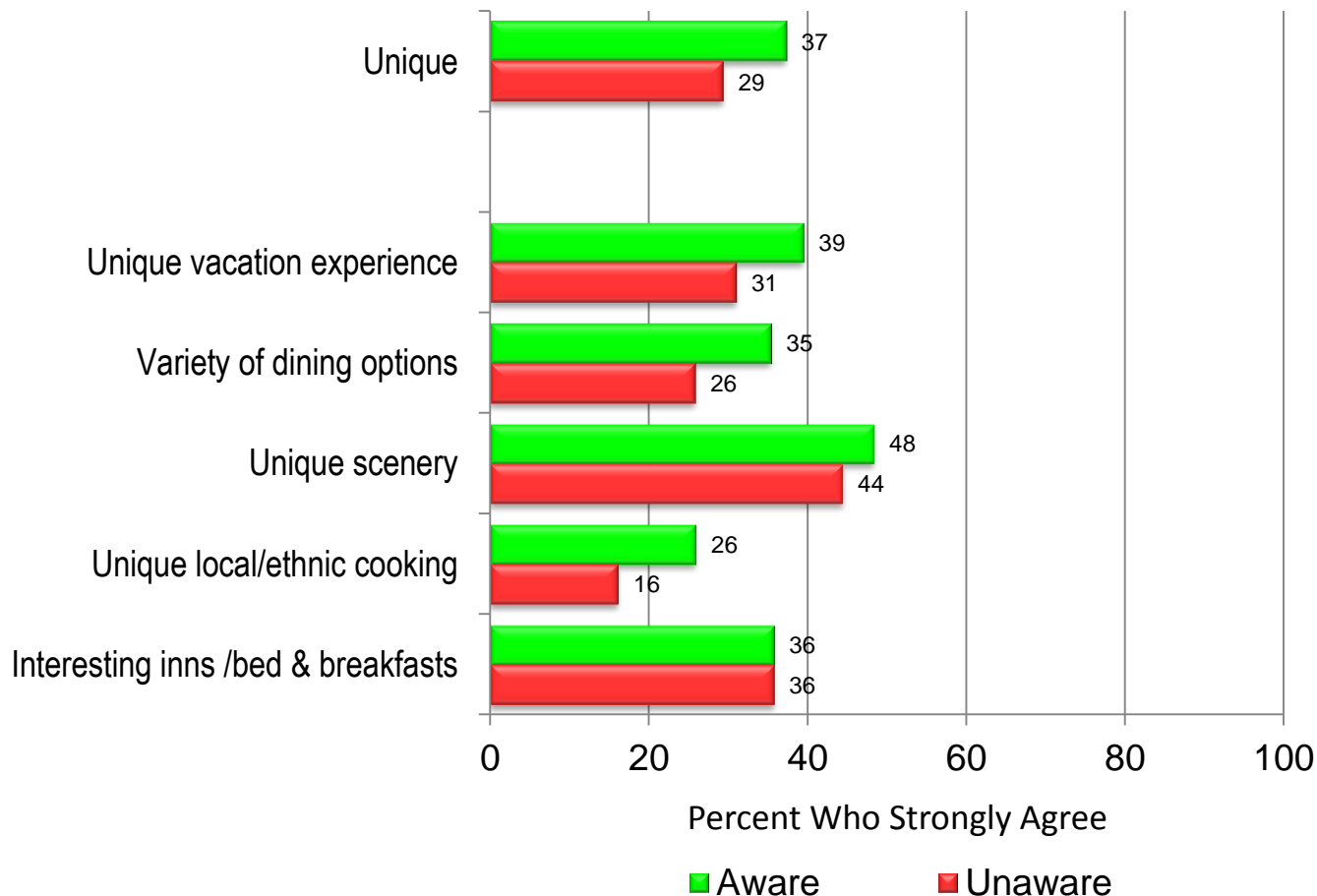
Base: Total Travelers



West Virginia's Image — Unique



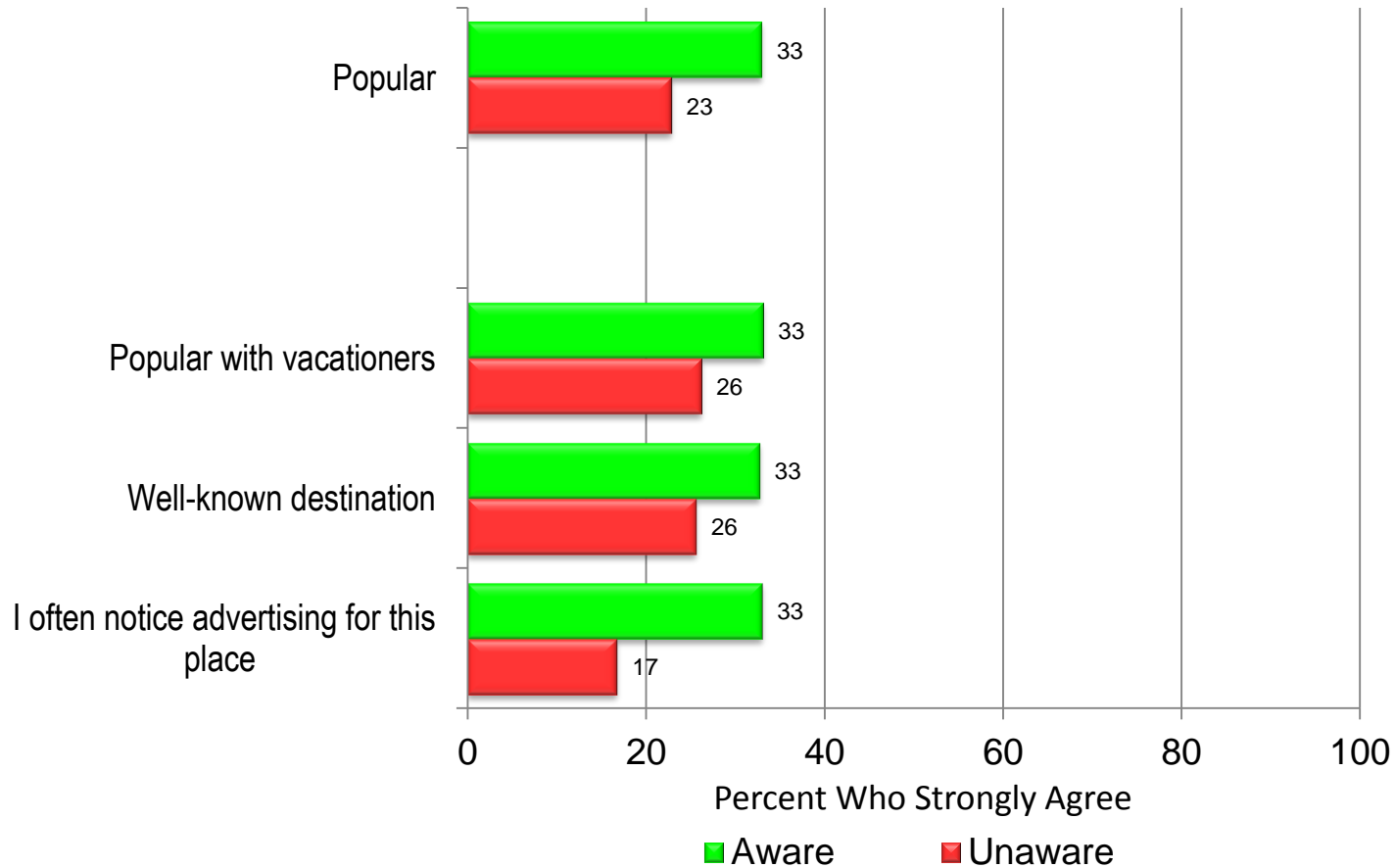
Base: Total Travelers



West Virginia's Image — Popular



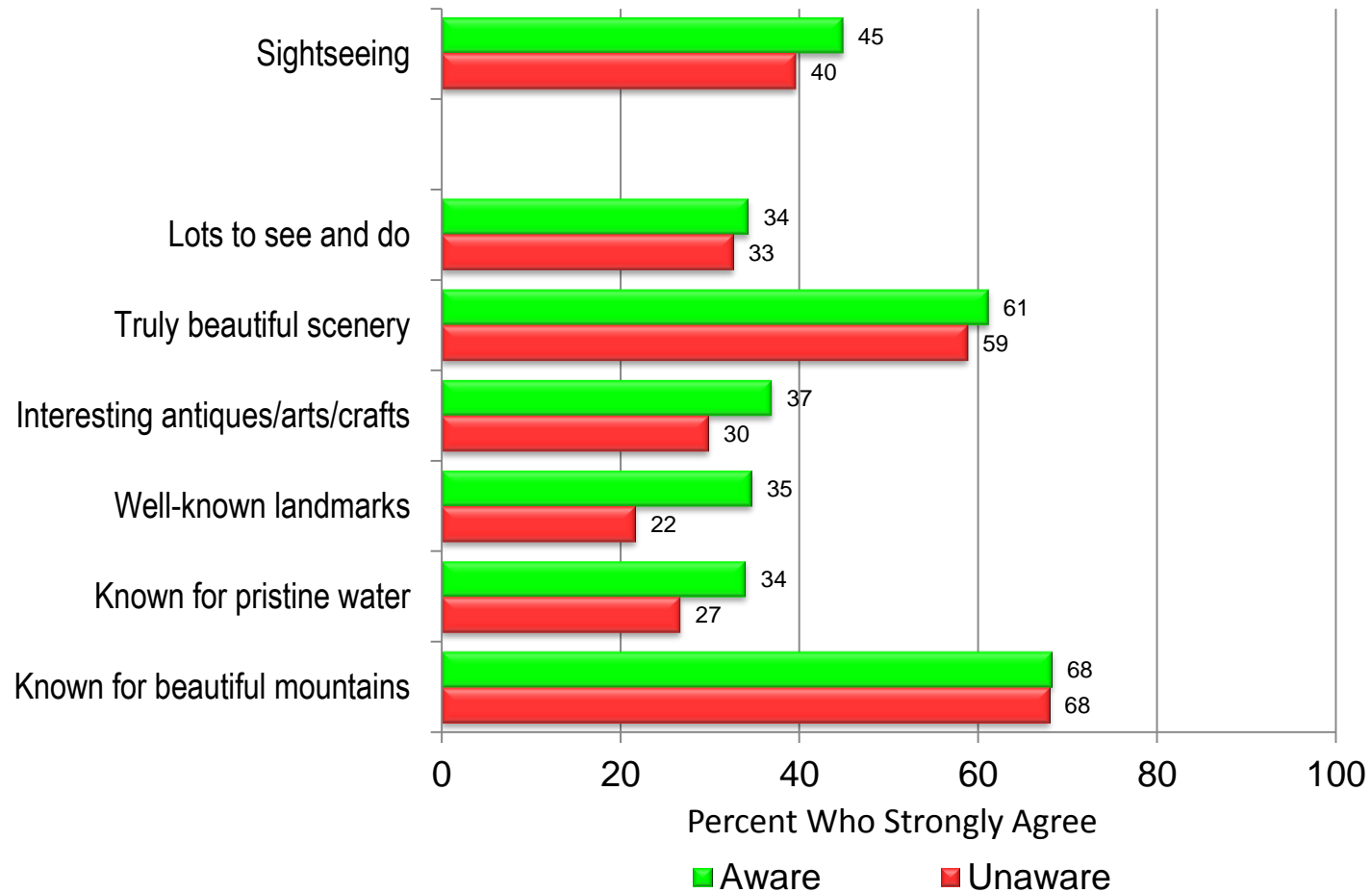
Base: Total Travelers



West Virginia's Image — Sightseeing



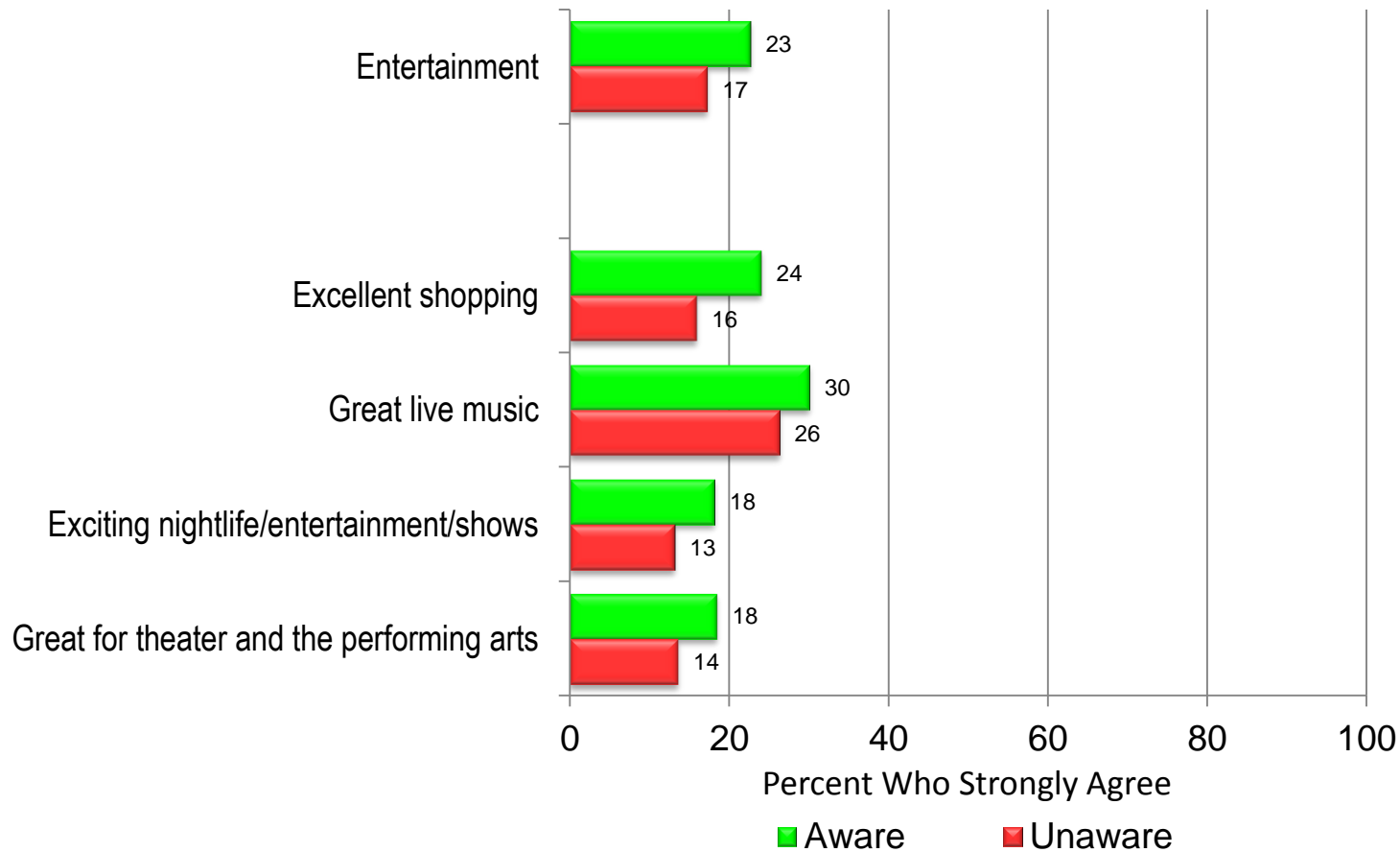
Base: Total Travelers



West Virginia's Image — Entertainment



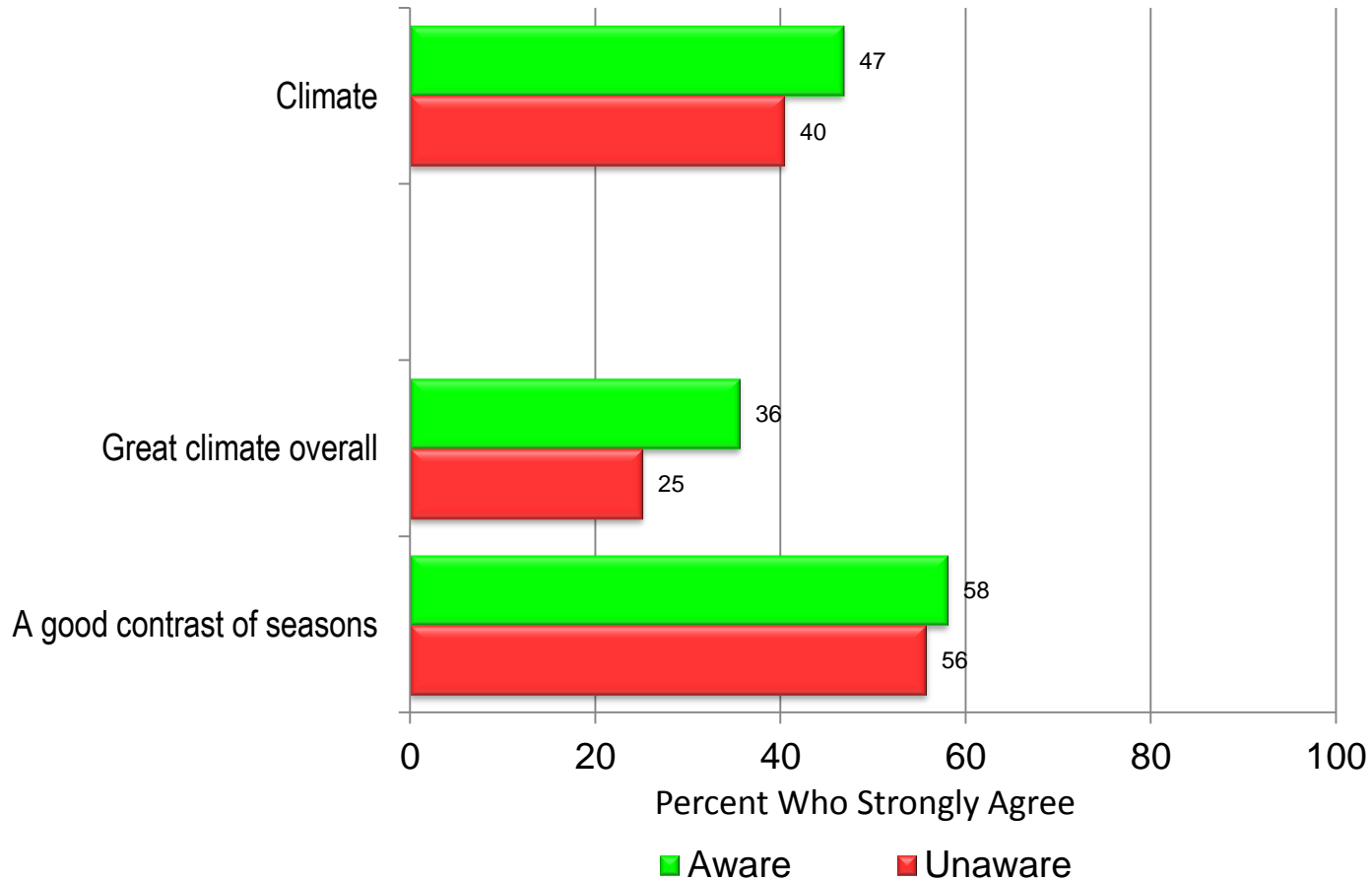
Base: Total Travelers



West Virginia's Image — Climate



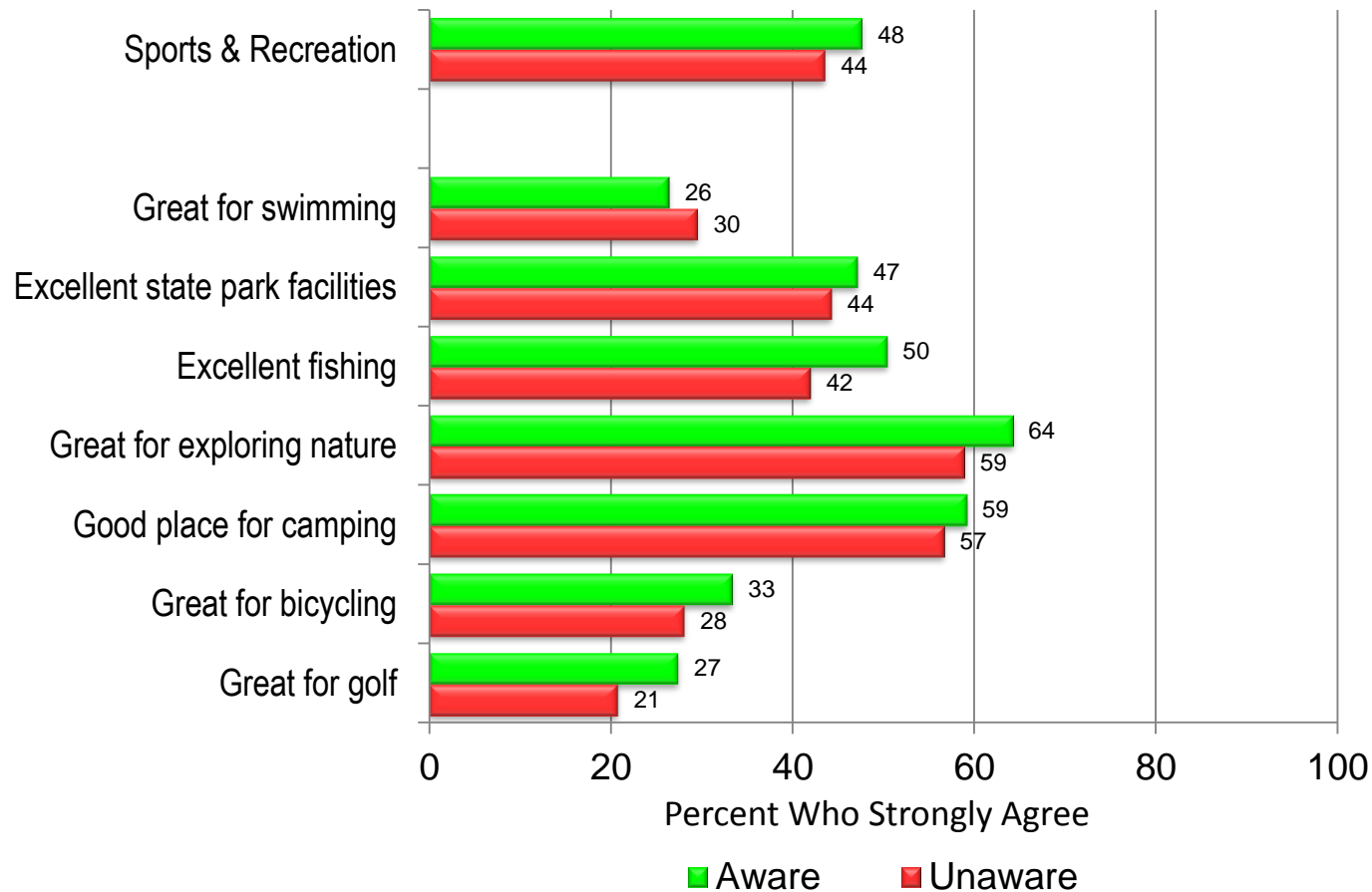
Base: Total Travelers



West Virginia's Image — Sports & Recreation



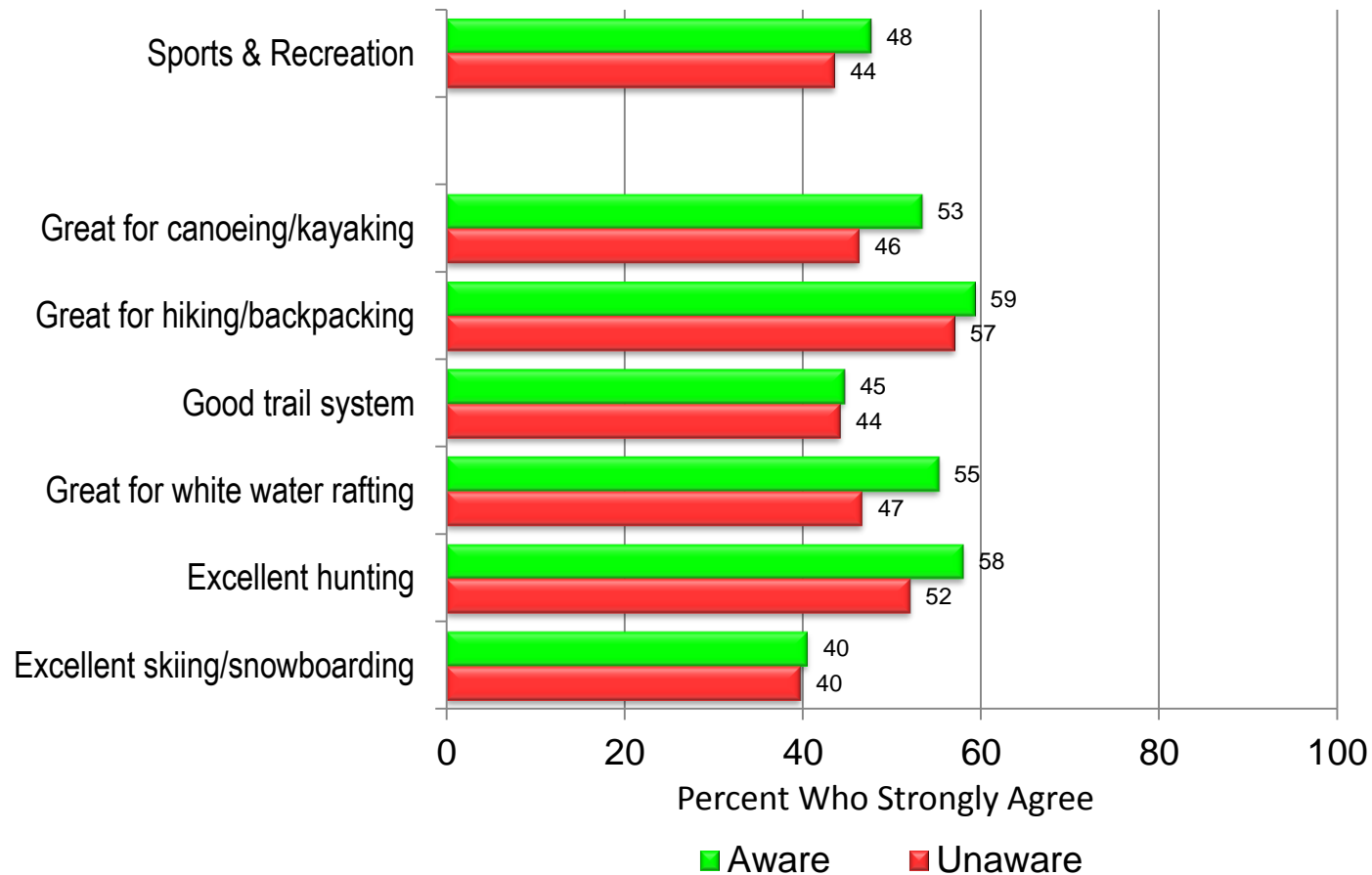
Base: Total Travelers



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



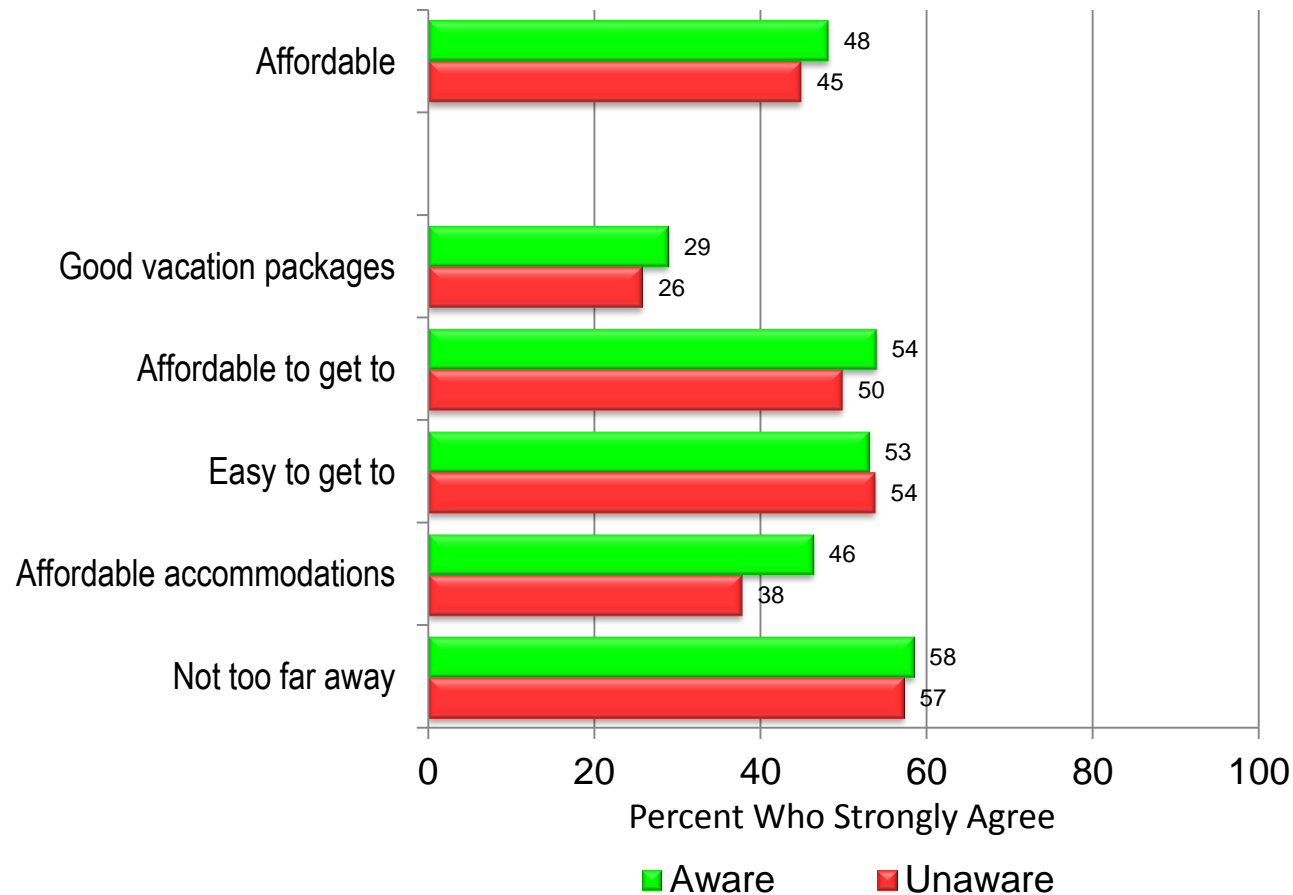
Base: Total Travelers



West Virginia's Image — Affordable



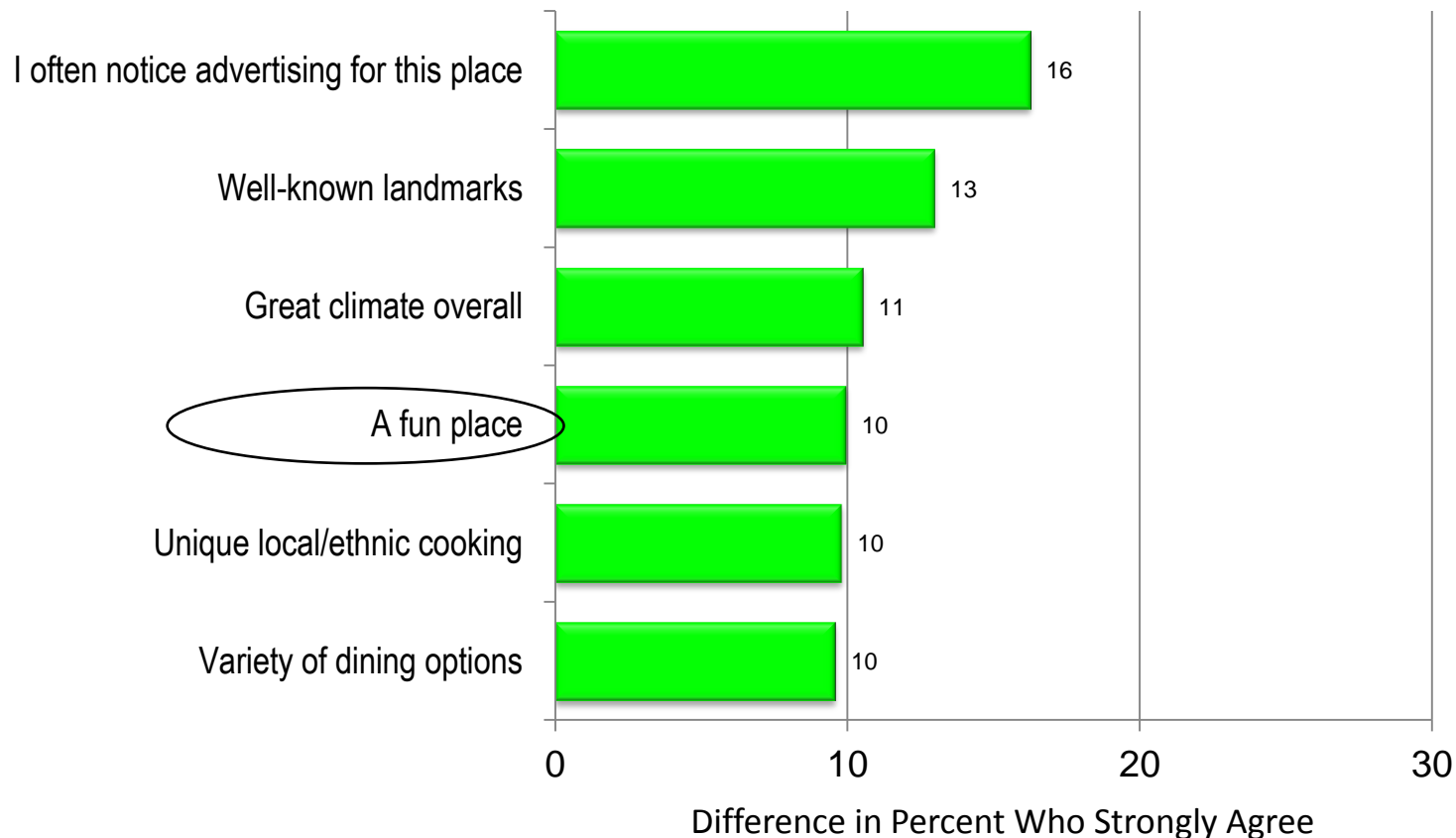
Base: Total Travelers



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

Short-Term Impacts of the Advertising

Short-Term Impacts of The Advertising



| | 2014 |
|------------------------|-------------|
| Ad Investment | \$1,876,667 |
| Incremental Visits | 1,500,486 |
| Incremental Spending | \$180.9 M |
| State and Local Taxes | \$13.0M |
| Spending ROI* | \$96 |
| Total Tax ROI** | \$7 |

- Incremental visitor spending per ad \$ invested.

Spending is based on \$138 per person for overnight trips and \$106 per person for day trips

** Incremental taxes per ad \$ invested.

Short-Term Impacts Summary



| | 2014 |
|------------------------|-------------|
| Advertising Investment | \$1,876,667 |
| Incremental Spending | \$180.9M |
| Incremental Taxes | \$13.0M |
| Tax ROI | \$7 |

Campaign Efficiency

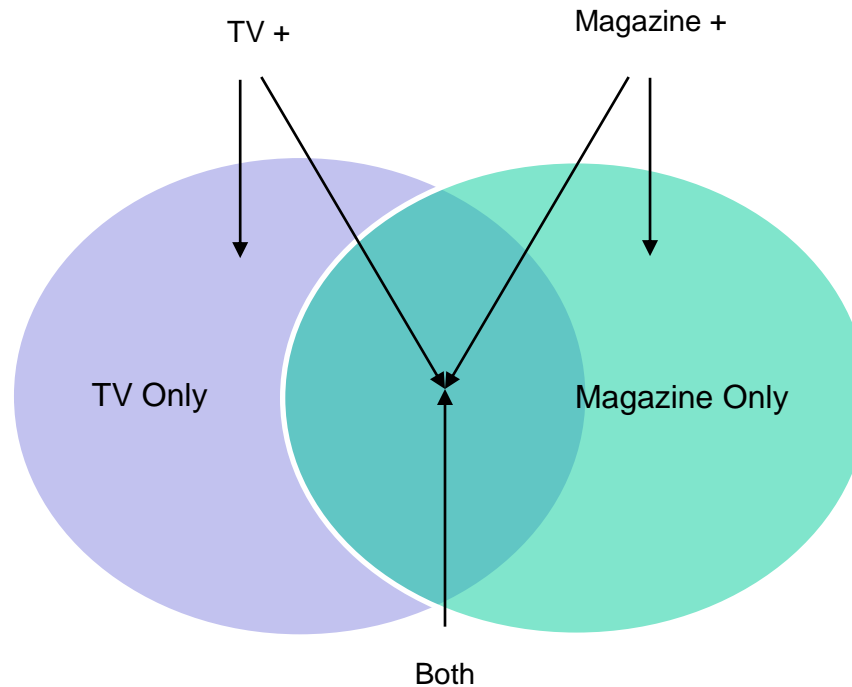


| | 2014 |
|-------------------------|--------------|
| Incremental Visits | 1,500,486 |
| Ad Investment | \$1,876,667 |
| Ad \$'s per Trip | \$1.3 |
| Trips per Ad \$ | .80 |

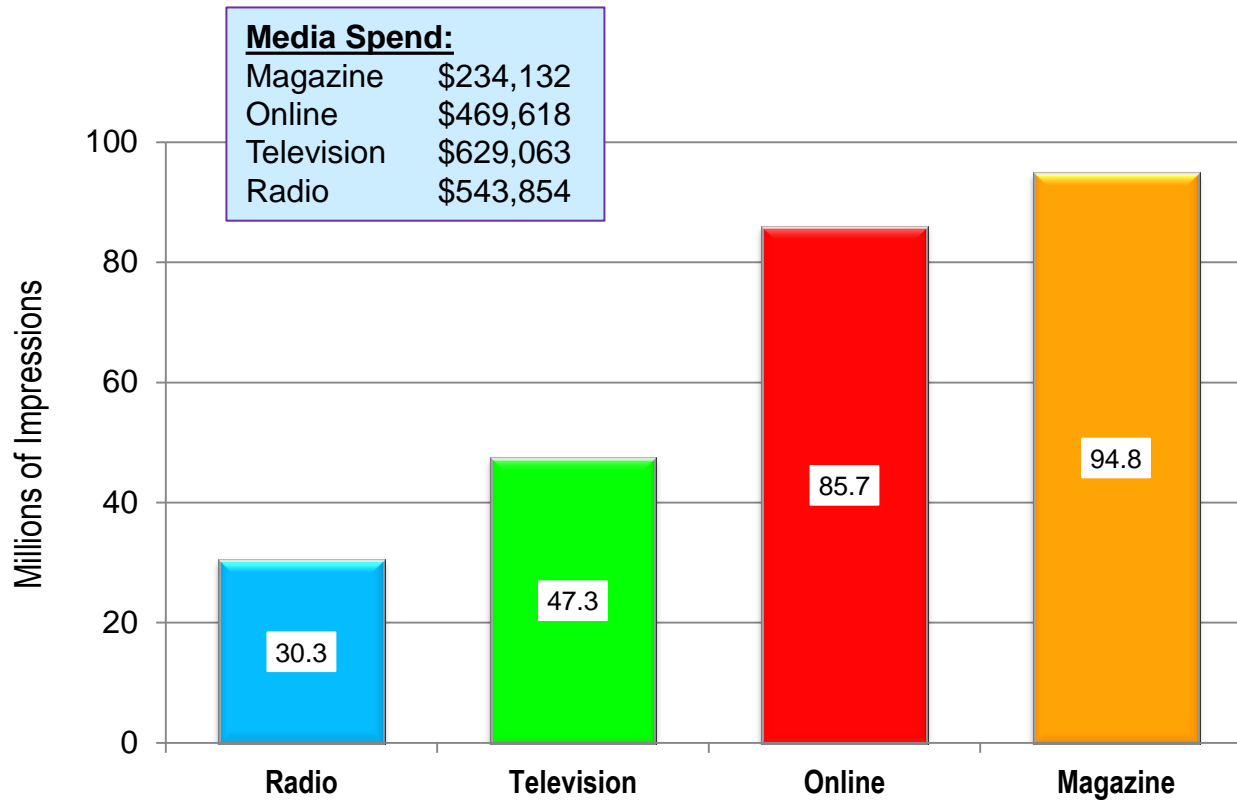
Appendix:

Media Diagnostics

Definition of Awareness



Total Impressions by Media



Impact of Ad Frequency on Visits to West Virginia

