Greetings  
FROM THE COMMISSIONER

As my first year with the Tourism Office draws to a close, I’m excited to share the progress we’ve made in promoting West Virginia as a world-class tourism destination. The past year has been one of tremendous change for the Tourism Office, and that change has created momentum that has already begun to show positive results.

The Tourism staff spent a lot of time this year digging into all the data available on the state’s tourism industry. We took an inventory of tourism assets in the state as well as a comprehensive review of our past marketing activities. We’ve worked to craft a strategy for a path forward in a new and ever-changing marketplace that will set us apart, raise our profile, and increase the economic impact of this vital industry.

We had a couple big wins this year. Our June #AlmostHeaven social campaign was a runaway success, scoring more than 15 million impressions worldwide thanks to West Virginians near and far who shared their love of the state. The campaign demonstrated the power of social influence, and it demonstrated the deep and profound longing West Virginia inspires in everyone who has been here.

The Tourism Act of 2017 passed during the legislative session and took effect July 7. The Act ended the outdated Matching Advertising Partnership Program and replaced it with a modern cooperative advertising program that will make every advertising dollar work harder for both our industry partners and the state brand as a whole. The program was unveiled in October, and the first offering received an overwhelmingly positive response.

At our Governor’s Conference on Tourism in October, we shared that we have obtained the rights to the song “Country Roads” for use in our marketing efforts. This classic anthem is known across the globe and has demonstrated ability to increase positive perceptions of the state.

We’re closing out the year on a positive note with all our key indicators ticking up: hotel occupancy, website traffic, welcome center visits, and travel guide requests. It’s no secret we’ve been in a tough economic cycle, but these indicators offer promising signs that we’re figuring out how to take back some market share. We’re letting the world know that West Virginia is almost heaven, and it’s working.

Chelsea A. Ruby  
Tourism Commissioner  
Executive Director, West Virginia Tourism Office

INDUSTRY OVERVIEW

The tourism industry in West Virginia is strong.

$4.1 BILLION  
ANNUAL DIRECT SPENDING

$11.3 MILLION  
PER DAY IN DIRECT SPENDING

45,000  
JOBS

$527 MILLION  
TOTAL TRAVEL-GENERATED TAXES

3.5 MILLION  
VISITORS TO WELCOME CENTERS EACH YEAR

15.9 MILLION  
OVERNIGHT VISITORS


We’ve seen consistent increases in hotel occupancy when compared to last year.

<table>
<thead>
<tr>
<th></th>
<th>2017</th>
<th>2016</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Occupancy</td>
<td>57.7%</td>
<td>54.2%</td>
<td>+6.5%</td>
</tr>
<tr>
<td>Demand</td>
<td>6.0M</td>
<td>5.6M</td>
<td>+7.8%</td>
</tr>
<tr>
<td>Revenue</td>
<td>$562M</td>
<td>$532M</td>
<td>+5.7%</td>
</tr>
</tbody>
</table>

Change calculated as (this year - last year) / last year.  
Source: Smith Travel Research, 2017.
While our return visitor rate remains steady and strong, we have identified several areas for growth and improvement, including extending the average length of stay and increasing the average spend per visitor.

We are well positioned to capture additional market share in a robust travel region to grow these numbers.

We know where our visitors are coming from and their top interests.

**STATE OF ORIGIN**

<table>
<thead>
<tr>
<th>State</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>OH</td>
<td>14%</td>
</tr>
<tr>
<td>WV</td>
<td>19%</td>
</tr>
<tr>
<td>VA</td>
<td>11%</td>
</tr>
</tbody>
</table>

**CITY OF ORIGIN**

- Washington, D.C.: 11%
- Charleston-Huntington: 8%
- Pittsburgh: 7%
- Cleveland: 6%
- Columbus: 4%

**REASON FOR VISIT**

- Family: 47%
- Outdoors: 10%
- Tour: 8%
- Casino/Gaming: 7%

**INDUSTRY OVERVIEW**

**Average Length of Stay:** 2.7 nights

**Average Spend Per Visitor:** $465

**86% of Annual Visitation Comes from Returning Visitors**

**52% of Visitors Report a Household Income of Less Than $50,000 Per Year**

**West Virginia offers travelers:**

- Unmatched outdoor recreational opportunities
- Breathtaking scenic beauty in all nine travel regions
- An affordable and safe place to visit and stay
- Natural paradise near urbanized east coast

INDUSTRY OVERVIEW

Tourism Assets

4
BEAUTIFUL SEASONS

1,000+
HISTORIC SITES TO EXPLORE

164,000
ACRES OF PUBLIC LANDS

36
STATE PARKS

130+
GOLF COURSES

6
MAJOR SKI AREAS

MORE THAN A DOZEN
RESORTS

600+
MILES OF ATV TRAILS

5
CASINOS

26
CRAFT BREWERIES

2
D1 SPORTS TEAMS

450
FAIRS & FESTIVALS

20+ wineries & distilleries
2 dozen lakes for fishing & swimming
Miles and miles of zip lines
Dozens of museums
3 scenic train companies
4 minor league baseball teams
9 state forests
9 national parks, forests, & recreation areas
30+ spas
40+ bed & breakfasts
One of the main goals of the Tourism Office is to promote the Mountain State to both in-state and out-of-state travelers. As such, the majority of the office budget is dedicated to a comprehensive in-state and regional media mix that spans across broadcast, print, digital and out-of-home mediums.

Our domestic advertising focused on using our budget efficiently to achieve high frequency in strategic markets.

- Washington, DC
- Philadelphia, PA
- Pittsburgh, PA
- Detroit, MI
- Columbus, OH
- Cleveland-Akron, OH
- Charlotte, NC
- Baltimore, MD
- Chicago, IL
- Raleigh-Durham, NC
- Cincinnati, OH
- Roanoke-Lynchburg, VA
- Harrisburg, PA
- Greenville, NC
- Indianapolis, IN
- Richmond, VA
- Nashville, TN
- Greensboro-High Point-Winston Salem, NC
- Louisville, KY
- Charlottesville, VA
- Lexington, KY
- Dayton, OH
- Grand Rapids, MI
- Toledo, OH
- Harrisonburg, VA
- Knoxville, TN

Our international marketing focused on strategic partnerships with Brand USA and Travel South.

Brand USA is the destination marketing organization for the United States. Through federal funds they are able to offer a one-to-one match for any state to advertise with them in international markets. By letting them deliver our message to international travelers, we’re making sure to leverage the investment they’ve made in promoting the United States in the international marketplace so that our message resonates with travelers.

To further maximize our investment, West Virginia coordinates all international outreach efforts through Travel South, a regional consortium of state tourism offices in the Southeastern United States aimed at attracting international visitors to come for multi-state visits.

These two programs have made international advertising an affordable and practical option for West Virginia. We’ve had success partnering with them for advertising and trade shows where we meet with international tour operators.

INTERNATIONAL ADVERTISING

- Brand USA, United Kingdom, winter, multi-channel campaign
- Brand USA, Canada, spring, multi-channel campaign
- Brand USA Global Inspiration Guide
- Travel South Tour Planner
- Featured on VisitTheUSA.com
- Featured on TravelSouth.VisitTheUSA.com

Backroads USA
Taste of the South
Traditional Home
Southern Living
“Country Roads, Take Me Home”

Our most profound advertising milestone of the year came after the successful acquisition of limited rights to West Virginia’s ‘unofficial’ state anthem, “Country Roads.” John Denver’s renowned song is heard and played across the world every day, and now the Tourism Office officially has rights to use the song in marketing and advertising efforts for the state. This will not only help increase brand recognition among out-of-state travelers, but will also help boost and cultivate more positive brand affinity from within state borders as well.

Research suggests hearing “Country Roads” makes West Virginia seem more appealing to consumers as a destination.

Tourism advertising in West Virginia has proven to be a strong investment.

RETURN ON INVESTMENT

For every dollar spent on tourism advertising, the state yields $8 in state and local tax revenue and $106 in direct traveler spending.

Without this tourism-generated revenue, each household in West Virginia would have to pay an additional $700 a year in state and local taxes.


Promoting tourism improves the state’s image across the board.

After seeing our ads, perceptions of West Virginia improved dramatically.

<table>
<thead>
<tr>
<th>Base: Out-of-State Residents</th>
<th>Aware</th>
<th>Unaware</th>
</tr>
</thead>
<tbody>
<tr>
<td>A good place to live</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A good place to start a career</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A good place to start a business</td>
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<td></td>
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<tr>
<td>A good place to attend college</td>
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<td></td>
</tr>
<tr>
<td>A good place to purchase a vacation home</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A good place to retire</td>
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</tbody>
</table>


Tourism spending helps more than just tourism.

Research shows tourism advertising improves West Virginia’s image as a place to live, start a business, go to college, and retire.
As we work to extend the value of every dollar spent on paid advertising, we’ve increased our focus on social and earned media as supporting methods for brand awareness and promotion.

It all started with the #ALMOSTHEAVEN campaign.

On June 6, 2017, Commissioner Ruby challenged everyone who loves West Virginia to go online to their favorite social media platform—Facebook, Twitter, or Instagram—and share with the world what makes West Virginia #AlmostHeaven.

The campaign resulted in consumers taking action to learn more about the state during the campaign.

CAMPAIGN RESULTS

15 MILLION TOTAL REACH OVER 2 WEEKS

REACH IN FIRST DAY: 1 MILLION
REACH IN FIRST WEEK: 5 MILLION

TWO WEEKS / 14 DAYS / 336 HOURS IS ALL IT TOOK FOR US TO LEAVE OUR MOUNTAINEER MARK ON THE SOCIAL MEDIA WORLD THANKS TO #ALMOSTHEAVEN.

#ALMOSTHEAVEN led to across-the-board increases in social reach and engagement.

FACEBOOK

WE’VE GAINED 17,721 FOLLOWERS THIS YEAR

WE ARE #3 IN ENGAGEMENT compared to similar tourism pages, only behind Pure Michigan and Explore Georgia. That’s beating out New York, Virginia, Florida, Wisconsin, Louisiana, New Hampshire, Connecticut and South Carolina.

TWITTER

We’ve received 43,918 profile visits this year.

New Followers: 10,973

Total Impressions: 2,518,900

INSTAGRAM

We’ve gained about 10,000 followers this year and averaged more than 150,000 impressions every week.

30,000+ #ALMOSTHEAVEN POSTS

415,000+ ENGAGEMENTS

LISTED AS TRENDING TWICE IN THE TOP 10 MENTIONS ON TWITTER

HAPPY BIRTHDAY, WEST VIRGINIA VIDEO 375,000 15,000 VIEWS IN 2 DAYS SHARES

SIGN UP >

122% NEWSLETTER SIGN-UPS

30% TRAVEL GUIDE REQUESTS

Sign up >
PUBLIC RELATIONS

Our social presence is generating significant increases in website traffic.

FACEBOOK REFERRALS 21% ▲

INSTAGRAM REFERRALS 180% ▲

TWITTER REFERRALS 548% ▲

Website traffic is up, and visitors are spending more time on the site.

After receiving the legislative audit of the Tourism Office website, the team not only made the requested changes, but took the suggestions one step further and conducted an in-house audit of additional website changes to further improve the visitor experience.

As such, the Tourism Office completed Phase 1 of a website relaunch in October 2017. The relaunch included all updated content pages that focus on road trips, itineraries and actionable content to help visitors plan and book a trip.

GOTOWV.COM

Time on site is up to 1.24 minutes

Page views are up to 1.92 minutes

2017 TOP METRICS

Time on site is up 22%
Travel guide requests are up 19%
Digital travel guide downloads are up 102%

We launched a new State Parks website with a new online reservations system.

We worked with the Division of Natural Resources to relaunch WVStateParks.com in August with a new online reservation system. The results were immediate and stunning: for the first time, every cabin was filled for one weekend this fall. The new platform gives the park system the tools it needs to increase revenue, and the new site is mobile-optimized and more accessible to visitors. Our state parks are some of our best tourism attractions, and the new site provides the showcase they deserve.

STATE PARKS WEB TRAFFIC

AVG. SESSION DURATION 88% ▲

02:48

SESSIONS 92% ▲

627,135

PAGEVIEWS 127% ▲

1,505,341

2017 REVENUE SINCE LAUNCH

$859,489

We’re telling the West Virginia story and gaining traction in national publications.
PARTNER PROGRAMS

We launched a new Cooperative Advertising program to replace the outdated MAPP grant program.

Thanks to the Tourism Act of 2017, the Tourism Office designed and implemented a new cooperative advertising program at the end of November. The program allows industry partners to buy into the state’s advertising campaigns and receive a dollar-for-dollar match.

The Tourism Office pledged $1.8 million to the new program, which is designed to increase overall brand awareness for both the state and participating tourism industry partners. The program leverages the state’s collective buying power to provide partners with a mix of in-state and regional advertising opportunities at a variety of price points. Opportunities are available for as little as $250.

Participating partners will be able to use the state’s tourism logo and campaign assets. Additionally, the program allows partners to tap into Tourism Office resources, including strategic media buying, creative development, media monitoring, and real-time results measurement.

The Tourism Act added Industry Development as a pillar of the services we provide. We are tackling that in two ways: 1. Helping existing businesses find ways to better promote and grow current operations. 2. Recruiting new tourism businesses to West Virginia.

PARTNER SERVICES

- Digital promotion through the state’s website
- Photography assistance
- Social media promotion
- Story pitches to travel writers and journalists
- Blog posts featured on website and on social media
- Directing callers on the 800-CALLWVA line to local business
- Brochure distribution at our 8 Welcome Centers
- Weekly news clips and updates to keep all partners current in-state and national trends
- Custom travel itineraries for trade shows and promotion
- Local event support
- Liaison among key government contacts, including Development Office, Small Business Development Center, Economic Development Authority, Division of Highways, and others

The program received an overwhelmingly positive response from the industry.

- 126 partners registered
- 19 media vendors participating, representing print, digital, broadcast and out-of-home
- 271 total media opportunities available
- 145 media requests made by partners
- 18 multi-partner groups, demonstrating regional and industry-wide collaboration

In 2017, the Tourism Office:

- Provided photography services to more than 20 partners
- Helped to pitch local destinations that were featured in more than 30 national, regional and local publications
- Promoted over a hundred partners in blog posts both on social media and the website
- Worked with hundreds of partners to improve their business listings on GoToWV.com
ADMINISTRATION

We’re committed to finding new and innovative ways to save money and work efficiently.

COST-SAVING MEASURES

▶ Reduced state vehicle fleet from three to one
▶ Cut mobile phone and data costs by half
▶ Reduced the number of office phone lines
▶ Implemented evaluation criteria for events we are asked to sponsor or attend
▶ Created and implemented new spending controls and sub-object codes to better track office spending

We’ve made our staffing structure more efficient.

We’ve responded to changes in legislation, industry needs, and marketing best practices by reorganizing our team and reevaluating divisions of labor.

▶ The elimination of the MAPP grant program means no new grants will be awarded, but we will continue to administer existing grants until they close out.
▶ The Tourism Office staff absorbed the functions of the Film Office.
▶ We have eliminated a retail sales program and are working to liquidate our inventory through a partnership with Tamarack.
▶ The volume of calls to our telemarketing center continues to decline. We’re using our call center staff’s downtime to keep the business and event listings up to date on our website, and we are investigating digital customer service delivery.

We have a strong foundation going into 2018.

The past year was pivotal for tourism in West Virginia. Changes to the industry over the last decade have meant changes for the way we approach promoting travel and tourism in West Virginia, and 2017 was a year of taking stock and changing course.

The fundamentals of our industry are strong. Our state’s natural beauty sets the stage for world-class recreation, charming small towns, and unique dining and entertainment. Our job is to tell our story to the rest of the world so they can discover for themselves what makes West Virginia almost heaven.
West Virginia is a world-class, four-season travel and tourism destination poised for tremendous growth and development.

We are located in the heart of a heavily traveled tourism region; however, West Virginia is dead last in traveler spending. While every other state in the region has seen increases in traveler spending, West Virginia has continued to see declines year after year. Now is the time for West Virginia to capitalize on the region’s growth and take back some of the market share.

*As reported by each state

We’re faced with two major disadvantages.

1. We’re starting from behind. Not only are we plagued by national misconceptions about our state, but our exposure in recent years has been so low that we are not even on the map as a potential travel destination among consumers.

2. When advertising to consumers, our ads run head-to-head with those from our surrounding states. While West Virginia’s general revenue budget is much smaller, the market does not offer us a handicap. When you compare the budgets of our surrounding states, including those from their local convention and visitors’ bureaus, we aren’t competitive.

We can do better. The key is additional advertising investment.