

Applying the MOTBD Brand Research



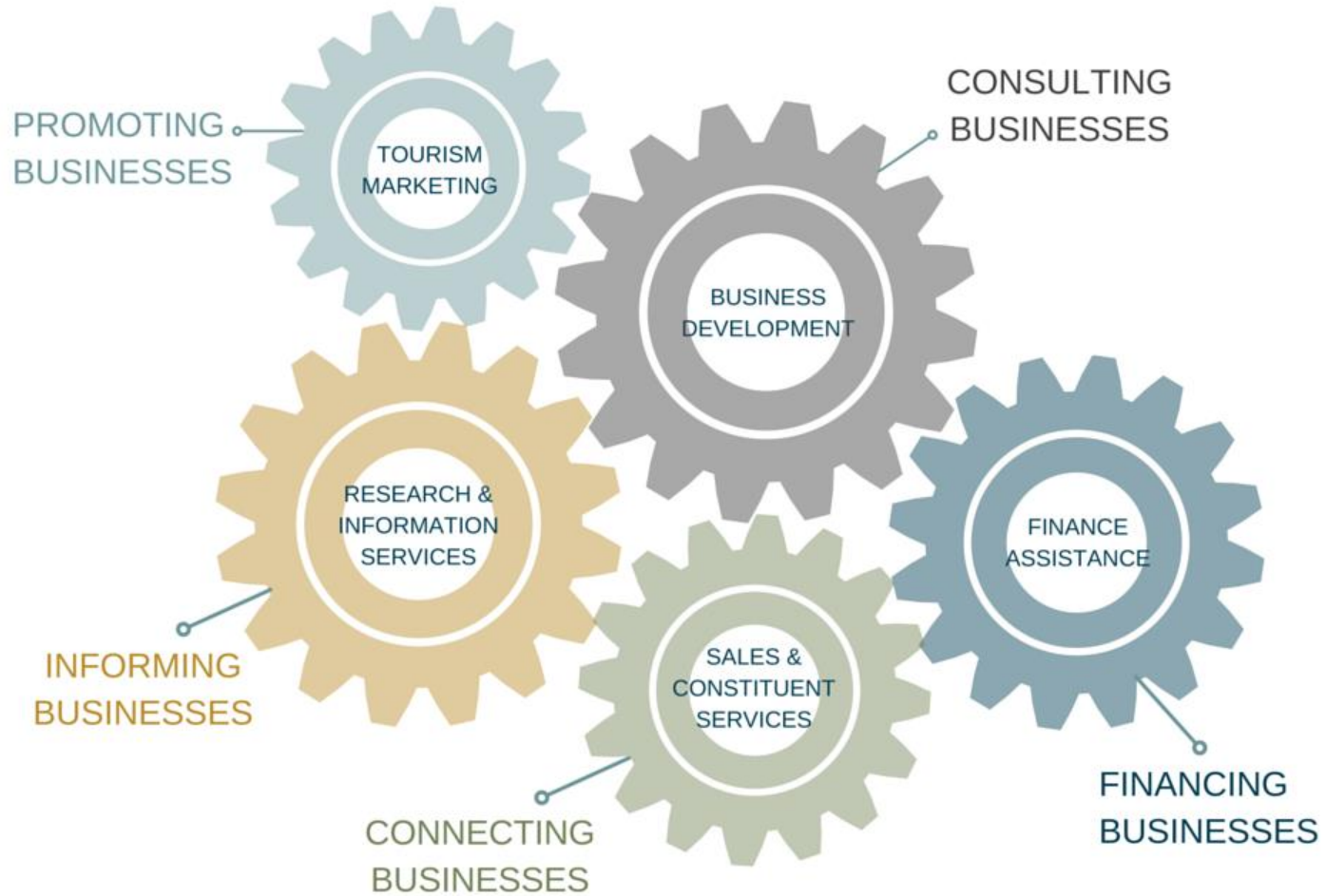
Presentation for SEMT
June 15, 2017

Mission: The mission of Visit Southeast Montana is to increase tourism to Southeast Montana by increasing awareness of our region, showcasing our cultural heritage, developing memorable experiences and educating our residents about the economic benefits of tourism



MONTANA'S ECONOMIC ENGINE

Tourism & Business Development Division | Department of Commerce



Industry Services & Outreach



TOURISM PARTNERS

- Tourism Advisory Council
- 6 Regions
- 18 CVB's
- 18 TBID's
- Tourism organizations
- Other Federal & State agencies



TOURISM GRANTS

- Arts/culture/heritage preservation grants
- Visitor facility upgrades/ construction grants
- Niche product development grants
- Trade Show grants
- Special project grant
- Training & education programs



INFORMATION & EVENTS

- Earned media
- Governor's Conference on Tourism & Recreation
- Internal communications
- MarketMt.com website



MADE IN MONTANA

- Made in Montana
- Grown in Montana
- Native American
- Made in Montana Annual Tradeshow
- Agritourism



STRATEGY & OUTREACH

- Strategic plan for tourism
- Workshops
- Branding platform
- External communications

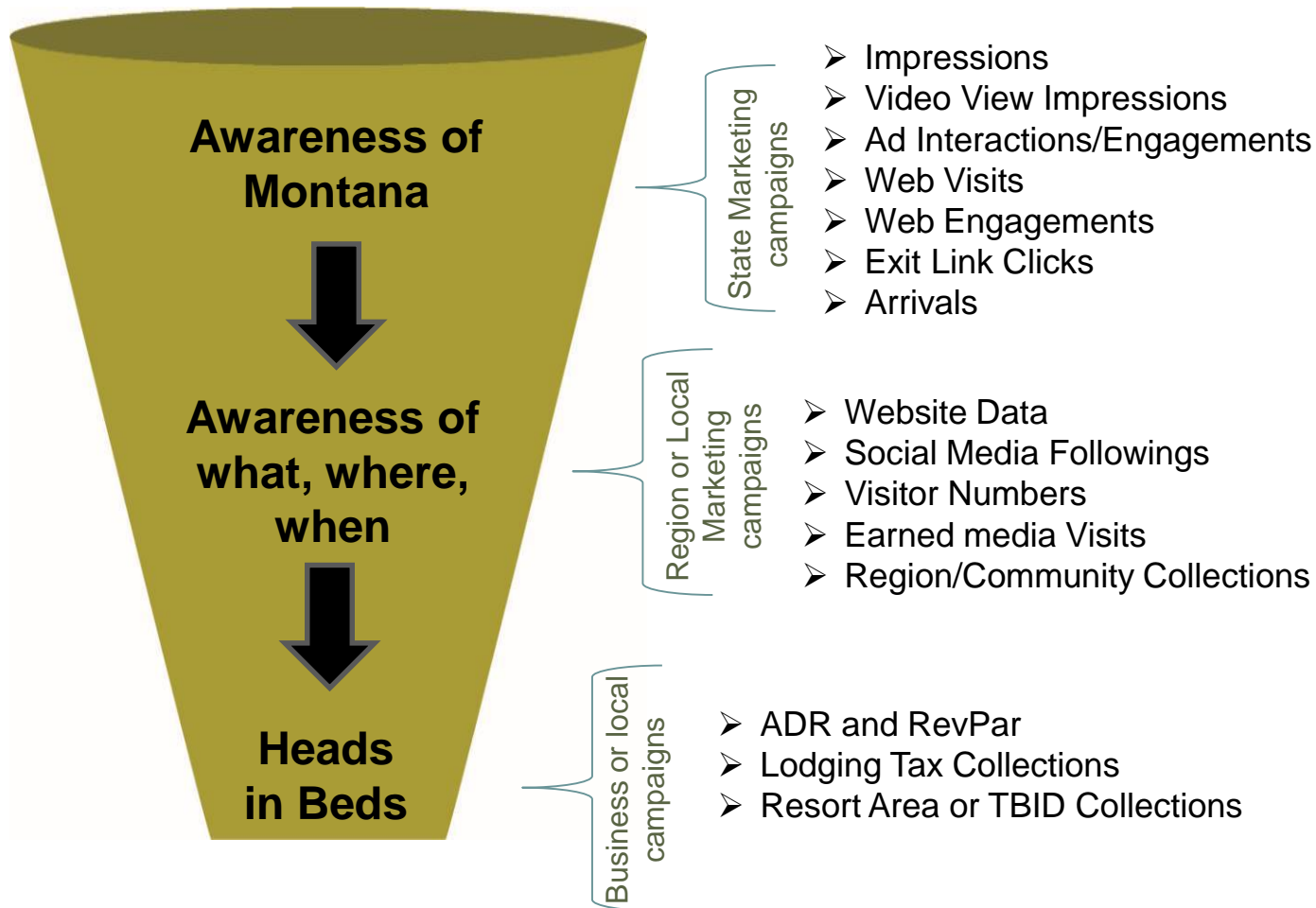


NICHE MARKETS & TRIBAL TOURISM

- Crown of the Continent & Greater Yellowstone Geotourism projects
- Dino Trail Co-op
- Tribal tourism
- Cultural Treasures project
- Special projects



Optimizing down the funnel



Montana Brand Analysis



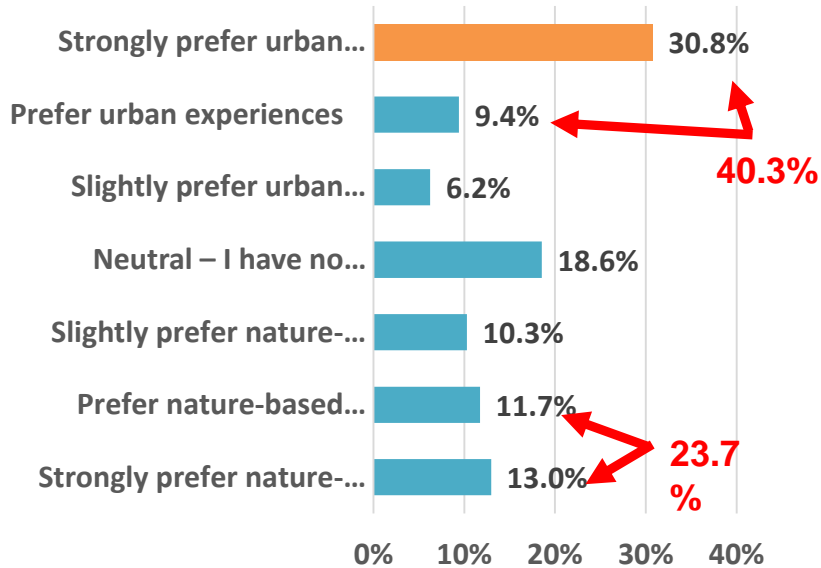
Destination  Analysts

MONTANA



Preference for Nature vs. Urban Travel

Diverse Travel Preferences



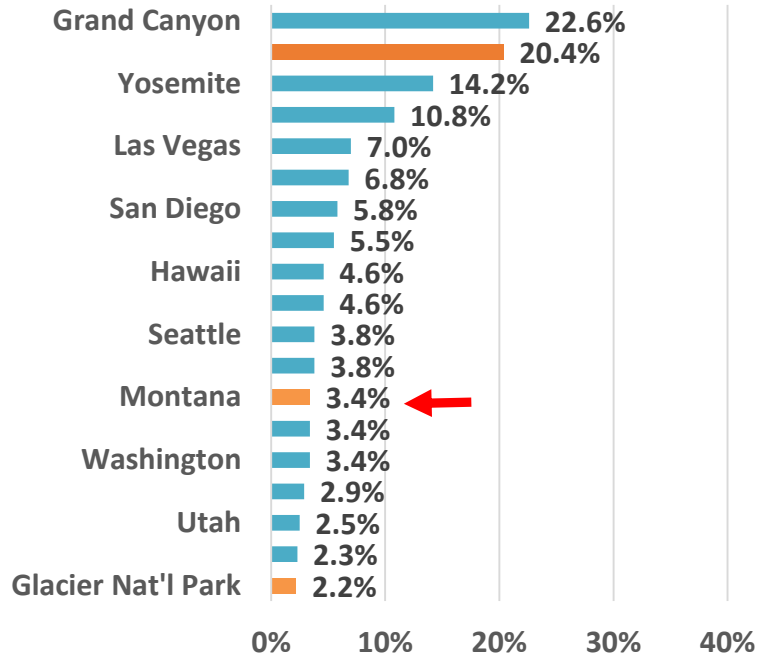
Question: Please think about the types of vacations you most like to take. Which bet describes your preferences for urban travel experiences compared to nature-based travel experiences?

Travelers enjoy many trip experiences, but exhibit stronger preference for urban to nature-based trips

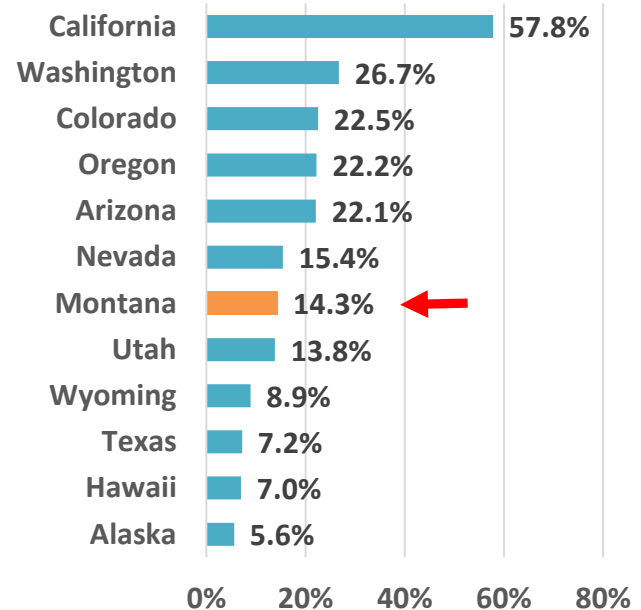


Awareness

Top of Mind Awareness



Top of Mind Awareness: States

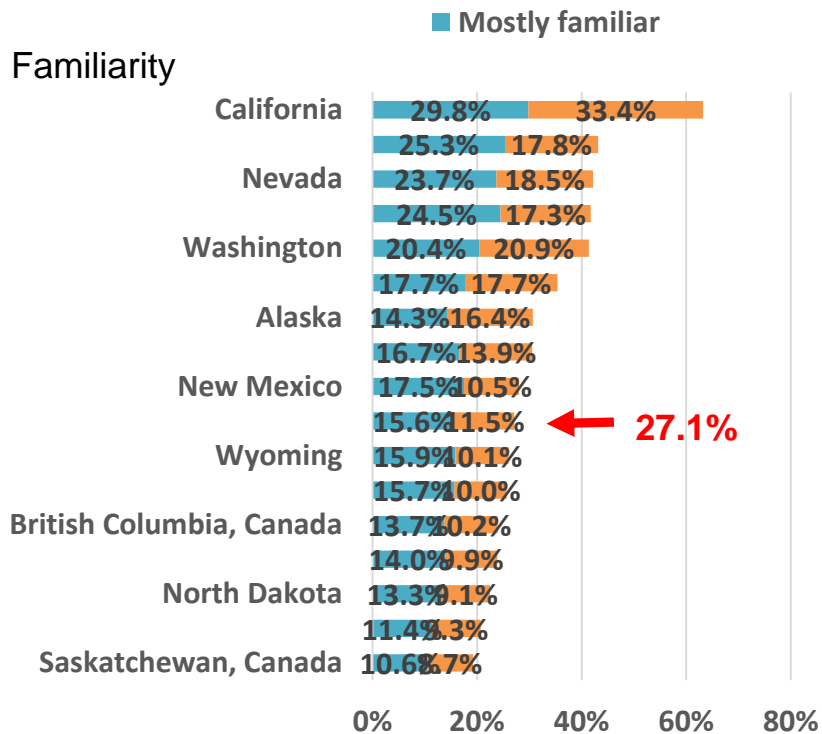


Question: Please think about travel destinations in the western United States (states, cities, parks, attractions, etc.) that you would like to visit specifically to enjoy outdoor activities and scenic beauty. Which are the three destinations that first come to mind? Base: All respondents. 5,630 Responses.

Question: Please think only about STATES in the western USA that you would like to visit to enjoy outdoor activities and scenic beauty. Which are the three states that first come to mind? Base: All respondents. 5701 Responses.



Destination Familiarity

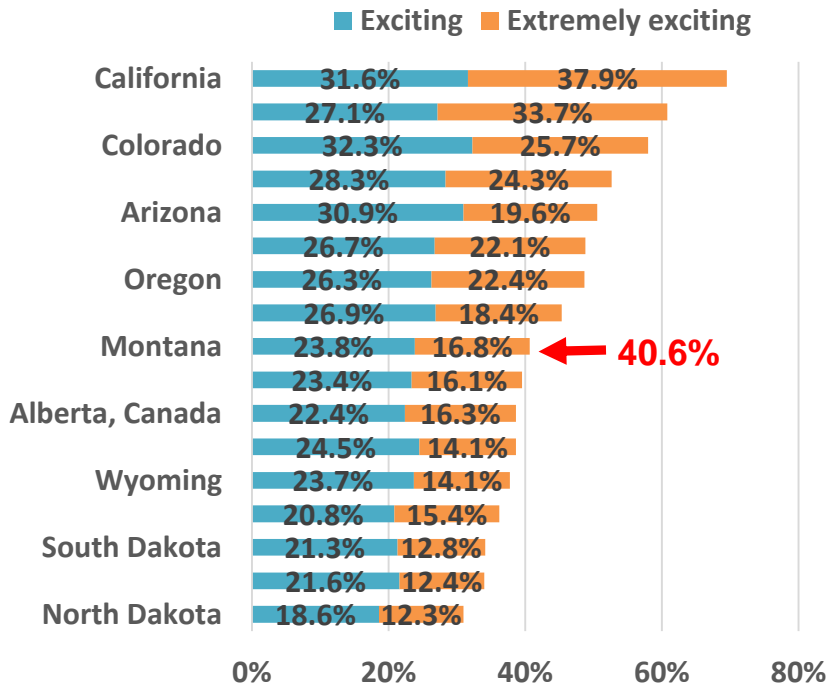


Question: How familiar are you with the attractions and things to see and do in each of these states (and Canadian provinces)? Base: All respondents. 6,245 Responses.



Destination Excitement

Excitement

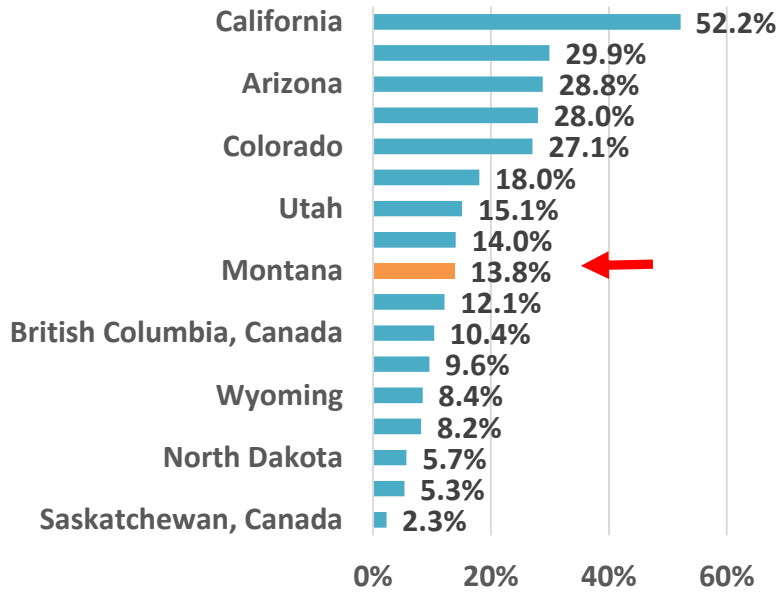


Question: As a leisure traveler, how exciting do you generally find the attractions and things to see and do in each of these states? Base: All respondents. 6,245 Responses.



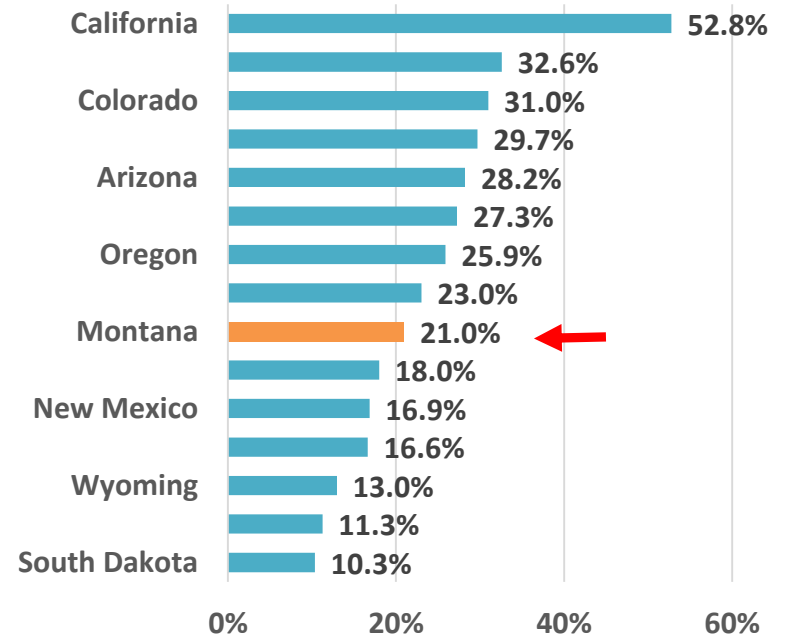
Recent Visitation & Likelihood for Near Future Visitation

Recent Visitation



Question: Which of the following states (or Canadian provinces) HAVE YOU VISITED as part of a leisure trip in the PAST FIVE (5) YEARS?
 Base: All respondents. 6,245 Responses.

Likely to Visit in Next 5 Years



Question: Which of the following states (or Canadian provinces) are you LIKELY TO VISIT as part of a leisure trip in the NEXT FIVE (5) YEARS? Base: All respondents. 6,245 Responses.



Key Takeaways

- Urban destinations compete with Montana
- Relatively low top-of mind awareness
- Relatively low familiarity levels
- Moderate excitement metrics relative to regional competition
- Aspiration gap suggests impediments to visitation:
 - too hard to get here
 - too hard to get around in Montana

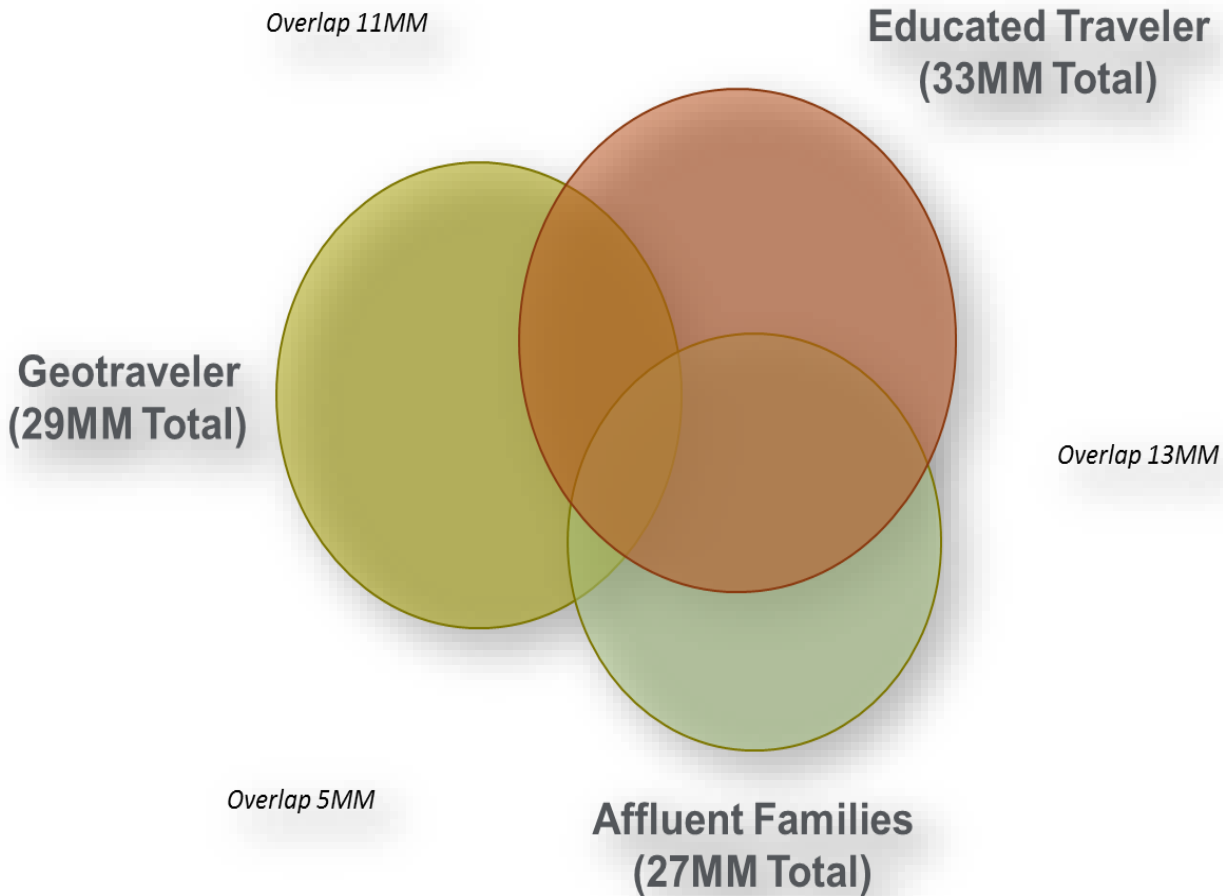


“Free-spirited adventure”

- A place for new experiences and where one can find new ways to experience the familiar.
- A place where one has access to uniquely powerful encounters with the natural world, as well as the comforts of modern life.
- Unique scenic beauty (sweeping mountain ranges, big sky ambiance and diverse geography)
- Unique wildlife viewing options (grizzly bears, buffalo, pronghorn antelope and elk)
- A surprisingly compelling state parks system
- Abundant scenic byways and opportunities for road trip adventures



Geotravelers to new targeted audiences



GeoTraveler:

- Focus on the experience of the destination
- Seek authenticity of people & places
- Well educated & environmentally aware
- Various age & income ranges
- 3+ trips per year





FAMILY AUDIENCE

Attended college+

Married w/ kids

Ages 25-54

HHI \$75K+



EDUCATED TRAVELER

College graduate+
HHI \$75K+
1+ personal trip last year



Top Psychographic Commonalities



Family Audience

Attended college+
Married w/ kids
A25-54
HHI \$75K+



Educated Traveler

College graduate+
HHI \$75K+
1+ personal trip
last year



70+% Agree (110+ Index):

- I **try** to eat dinner with my family almost every night
- I typically celebrate special occasions at restaurants
- Fashion: Comfort is one of the most important factors
- If a product is made by a company I trust, I'll buy it even if it is slightly more expensive
- I like to compare prices across different sites before purchasing something online
- Heavy Recyclers (126 index)



Learnings from the campaign

- Use what we know about the target audience
- Whenever possible, show people in the ads, not just the beautiful landscapes
- Pair your location with an appealing experience



Leveraging the MOTBD imagery

FY17 Warm Season Creative Examples



Leveraging the MOTBD imagery



Family Fun Magazine June July Everybody Outside issue. On sale date of 6.6.17

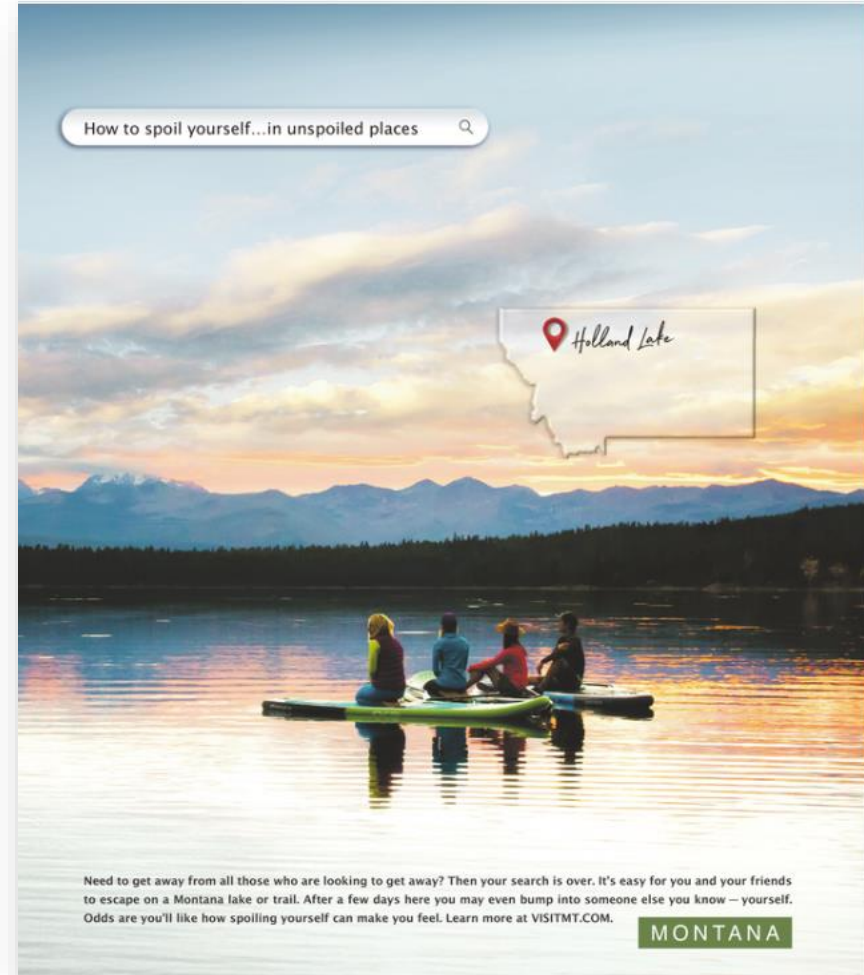


Runner's World, July, Training Through the Ages issue. On sale date 6.13.17



Leveraging the MOTBD imagery

- If the imagery shows kayakers or cyclists, create a list of nearby lakes or biking routes. Try to make it the best list ever.
- Add info you would want to know to plan a hike or rent a kayak.
- Note which trails or waterways are pet friendly and family-friendly.
- Include trailheads, parking areas, and restrooms.
- Add locations for lunch, groceries or a picnic-to-go.
- Distribute the list everywhere, to the people who get asked the questions.



*Wall Street Journal Magazine June/July, Summer Escapes issue.
On-sale date of 6/3/17.*



Leveraging the MOTBD story

Advertisement

RUN THE BEST OF... MONTANA

1 RUNNER'S HAVEN: GLACIER NATIONAL PARK
Selected Trail: Hidden Lake Trail
A 6-mile round-trip route begins at the "crown jewel" known as Logan Pass. This trail's terrain transforms from a wooden walkway to a dirt path and is carpeted with fields of wildflowers in the spring and summer seasons. Take the time to gawk at panoramic views across alpine meadows and rugged peaks and keep your eyes peeled for mountain goats that frequent the area.

2 CITY TO RUN: BILLINGS
Perfect Run: Airport to Zimmerman Park and back
This out and back 8-mile route has the most scenic view in all of Billings. The dirt trail brings you to the top of the Rims where you can embrace your adventurous side and wander down dirt trails to get in some additional miles. Venturing off course may inspire a feeling of being on top of the world...or at least on the top of Billings, which is still pretty great.

3 HIDDEN RUN: LIVINGSTON
Main Attraction: A not-so-touristy run can be found about ten miles from Livingston, MT, at the Elephant Head Mountain Trail in the headwaters of Mission Creek
If running at 5,750 feet doesn't take your breath away, the Views in Mission Creek Canyon will. The Elephant Head Mountain trail is a local favorite with wildflower-dotted cow pastures that line the quiet dirt road and out through the foothills of the Rockies' Absarokas Range. En route, you'll pass through dense forest, grassy streamside meadows, burned forest trees and expansive alpine tundra with a panoramic view.

4 RACE TO TRY: MISSOULA MARATHON
This point to point course will bring you through the ultimate scenic countryside surrounding the Rocky Mountain town of Missoula. With a small pool of registrants, this intimate race can act as a BQ for elites or a run/walk race for beginners with a 7.5-hour cutoff time. This mostly fast and flat course only has one significant hill right at the halfway point. Though during the race you may dread climbing it, it will bring you a pretty epic view of a particularly famous mountain range. During the race you'll also come across alfalfa fields, pine forests, and run over the Clark Fork and Bitterroot River. Overall, a refreshing race and a must-run when planning your visit to Montana.

Discover your #MontanaMoment at VISITMT.COM!







INSIDER TIP: Make it a surprise run before peak sightseeing lines to see the full beauty of the area.

COFFEE BUZZ: Check out Rock Creek Coffee Roasters for your daily dose of dark roast before hitting the trails.

AFTER THE RACE: Celebrate your finish with a Cold Moose Cream Trout Slayer Wheat Ale from Big Sky Brewing Company.

Advertorial for Runner's World - June issue

MONTANA PRESSROOM



Welcome to Montana!

We're happy to introduce *A Taste of Montana*, the newest video in the *Discover Your #MontanaMoment* summer video series. For assistance with this or other Montana travel stories, we can be reached through the [Montana Pressroom](#) or on [Twitter](#).

Montana on Tap

Meadowlark Brewing combines local ingredients to create classic Montana brews

"There's a lot of opportunities for the craft beer drinker to come to Montana and enjoy locally made beer," said Travis Peterson, the founder of Meadowlark Brewing.

In *A Taste of Montana*, the latest installment in the *Discover Your #MontanaMoment* video series from the Montana Office of Tourism and Business Development, Travis Peterson combines his love for his state and craft beer to create a distinct taste of the West. Meadowlark Brewing, located in one of the most eastern cities of Montana, Sidney, pays homage to the state's natural ingredients, including pure glacier water and locally grown barley, wheat and hops.

"Community is really what you're talking about with our state," said Peterson. "A lot of

Bozeman Craft Beer Week – May 6-13th, 2017

MONTANA



Leveraging the MOTBD content

- People in the ads and beautiful landscapes.
- Featuring an activity favored by the target brand audience
- Looks safe!
- Features national parks.
- Also includes the necessary amenities by featuring communities or lodging options
- Includes a suggested route full of scenery, wildlife, museums, and dinosaurs!

SPECIAL PARTNER SECTION

Glacier National Park

MONTANA'S ULTIMATE *Park-to-Park* TICKET

Explore two signature stunners—Yellowstone and Glacier National Parks—plus a spread of attractions along the 400-mile stretch connecting them.

GLACIER NATIONAL PARK
Keep the camera handy during an epic drive along the Going-to-the-Sun Road, where rushing waterfalls spray inches from your window. Be on the lookout for mountain goats!

WHITEFISH, KALISPELL AND BIGFORK
Nestled within 50 miles of one another in the Flathead Valley, these three towns have their mild sides with indie shops and restaurants. But they also go wild with zipline tours, aerial adventure parks and an alpine slide.

FLATHEAD LAKE
Explore the largest freshwater lake west of the Mississippi River via rented pontoon, paddleboard, fishing boat or ski boat. Hike the trails on Wild Horse Island State Park to spot bighorn sheep and wild horses.

NATIONAL BISON RANGE
You don't have to leave your vehicle for snaps of bison, elk, deer and other free-roaming creatures.

PHILIPSBURG
This former mining town features quaint shops including The Sweet Palace, offering handmade candy and fudge, and Sapphire Gallery, where visitors can try prospecting. The Granite County Museum is home to the Ghost Town Hall of Fame.

MUSEUM OF THE ROCKIES
This Bozeman draw houses one of the world's largest collections of dinosaur fossils, including 13 T. rex specimens.

LONE MOUNTAIN RANCH
This outdoor basecamp offers multiple adventures: horseback riding, a hike to a waterfall, a mountain tram ride or a scenic drive. Stay overnight in a rustic-chic cabin, and dine on farm-to-table eats.

YELLOWSTONE NATIONAL PARK
Otherworldly wonders (geysers, hot springs, mudpots and more) await at the nation's first national park.

Yellowstone National Park

No theme park in the world can match a Montana adventure!

WIN \$2,000
TOWARD A
DREAM VACATION
to Montana!

ENTER TODAY AT
FamilyFunMag.com/Adventure

FLATHEAD LAKE

ENTER FOR A CHANCE TO WIN. NO PURCHASE NECESSARY TO ENTER OR WIN. Subject to Official Rules at www.FamilyFunMag.com/Adventure. The Family Fun Adventure Giveaway Sweepstakes begins at 12:00 AM EST on 6/1/17 and ends at 11:59 PM EST on 7/31/17. Open to legal residents of the 50 United States, and the District of Columbia, 21 years or older. Limit one (1) entry per person and per email address. Void where prohibited. Sponsor: Meredith Corporation.

Contest Advertorial for Family Fun - June issue

MONTANA



Your content

- Is your community or business listing correct?
- Do you have the best image?
- Do you have too much content or not enough?
- Do you emphasize what is important to these target markets?
- Have you added your community events?
- Are your dates correct?
- Are there easy-to-follow directions on how to get there?

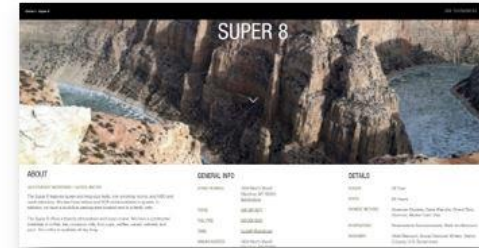
VisitMT.com information listing

VisitMT.com is Montana's website for destination visitors to inspire travel to Montana and assist in trip planning. Businesses pertaining to tourism can list their business at no charge.

This is a great way to market your business with a website that receives more than 2 million visits per year! Take the time to do a little spring cleaning

by checking your business listing for accuracy and/or update your photos. To get started, visit <https://business.visitmt.com/default.aspx>. This page has both an online video tutorial and a downloadable PDF file to assist you. For additional questions, please email Jan Wirak at jwirak@mt.gov until June 30, 2017.

To update the description of a community or add additional images, you will need to contact Jan Wirak directly at jwirak@mt.gov. Jan would need to upload the information for you. Please note that city descriptions are limited to no more than 500 characters with spaces. A city can have up to 12 images, and the images do not have descriptions attached to them.



Event Listings

To get a listing on the state visitors website, Events page on VisitMT.com, you submit your event through "Lively Times." (Remember that some tourism regions and CVBs pull from the state's list of events to populate their websites.)

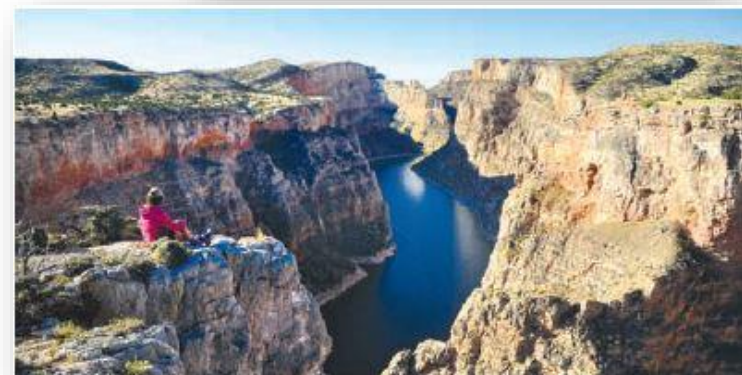
All events are divided up by our tourism regions. The process for submitting events is to use the Lively Times submission form <https://events.livelytimes.com/users/login>

Note: This process will change after 8/1/17 once the event listings will be managed by the state's Tourism Marketing office and not by Lively Times.



What is your story?

- An ideal trip for a Family or the educated traveler would center around:
 - Day hiking
 - Boating, canoeing, and kayaking
 - Geologic wonders
 - Dinosaur Trail
 - Makoshika State Park
 - Dino Digs
 - Moss agate hunting along the Yellowstone River
 - Historic adventure
 - Child-friendly activities related to history
 - Ghost Towns & Buildings: Kempton Hotel
 - Battlefields: Custer Battlefield Tomb of the Unknown Soldier
 - Museums





Made in Montana: What does the program offer?



Eligible products are either grown, produced or have been substantially transformed within the state of Montana and the value is now 50% or more of the individual parts used in the production process.



- **Logo Identification Labels**

Offers you the opportunity to use appropriate program logos for marketing purposes

- **Database of online listings**

Listing on the Made in Montana website including photos, product description, and a hyperlink to your own website.

- **Made in Montana Tradeshow for Food & Gifts**

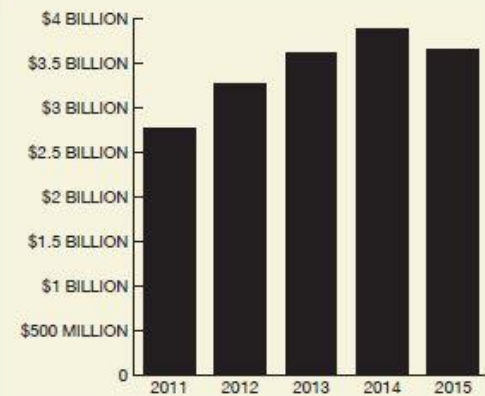
Wholesale tradeshow held every March in Helena- which has historically garnered over 465 wholesale buyers and 6800 members of the public
(specific requirements must be met in order to qualify as exhibitor or wholesale buyer)



Leveraging the Made in Montana Story

- Who offers “Made in Montana” products?
- Which restaurants feature “Grown in Montana” farm-to-table offerings?
- Do you feature local breweries and distilleries?
- Do your community restaurants feature Montana foods or products on the menu?
- Are your farmer’s markets events listed?
- Do you have a list of pick-your-own farm locations?
- Have local businesses signed up for the program – no charge if you meet the requirements!

NON-RESIDENT SPENDING, 2011-15



2015 Spending by Category

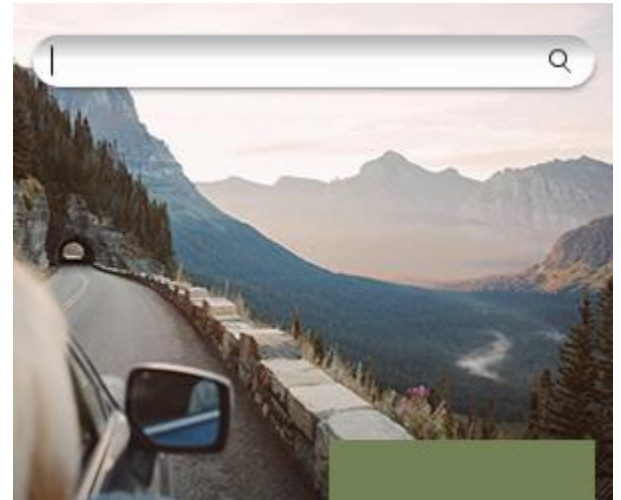
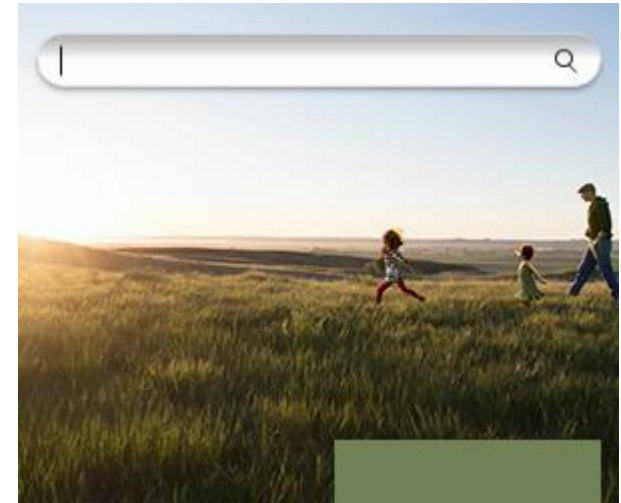
Gasoline, Diesel	\$726,620,000
Restaurant, Bar	\$647,640,000
Retail Sales	\$412,890,000
Hotel, B & B, Etc	\$403,490,000
Licenses, Entrance Fees	\$340,880,000
Outfitter, Guide	\$295,800,000
Groceries, Snacks	\$298,020,000
Made in Montana	\$265,090,000
Auto Rental	\$78,310,000
Rental Cabin, Condo	\$66,970,000
Campground, RV Park	\$34,910,000
Farmers Market	\$23,490,000
Auto Repairs	\$22,970,000
Misc. Services	\$22,310,000
Gambling	\$17,290,000
Transportation Fares	\$920,000
Total	\$3,657,600,000



Leveraging Social Media

Feature the activities and attractions wanted by the high-potential visitor and unique to your location or business including:

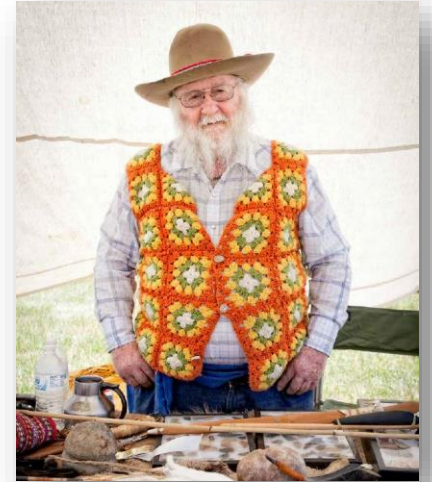
- Outdoor activities: camping, hiking, mountain biking, water sports, horseback rides, fishing
- Scenic drives
- State parks (Rosebud Battlefield SP)
- Dinosaur museums and trails
- Famous battlefields
- Ghost towns
- Tribal tourism experiences



Leveraging Social Media

Your area has incredible events!

- Are you integrating events into your social media campaigns?
- Are you sharing other posts about area events?
- Video?
- Are you using events as a sales trigger? Plan a Yellowstone itinerary with a stop in SE Montana for an event!
- Are you using affordable tools such as “*Facebook Live*”?
- *Example: [Montana TV](#)*



Leveraging “Scenic Drives”



- Top activity
- “Driving” is the adventure
- Slow down and enjoy the “scenery” but define the scenery – it’s more than just the mountains!
- Describe the amenities ensuring the route is safe and secure
- Base the route on attractions: Yellowstone Tail Dam, Pictograph Caves, Little Bighorn Battlefield National Monument, Makoshika State Park, Ranger Riders, Frontier Gateway and Carter County Museums
- Leverage existing maps: motorcycle, brewery and ice cream (other thematic maps as they are developed), Billings hiking trails map



Leveraging “Nightscapes and Starscapes”

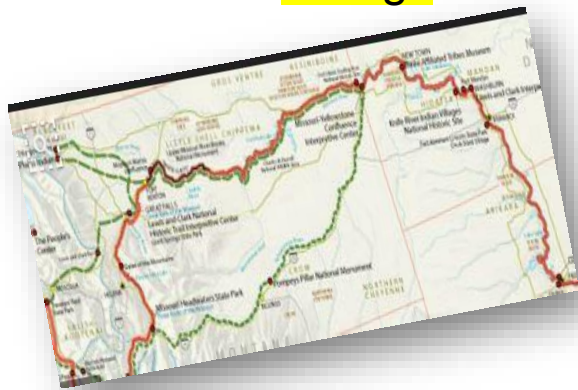
- August 21, 2017 Solar Eclipse...might be moving north!
- Tourists will be coming from far and wide to see the event, but Astronomy Magazine editor Dave Eicher noted that it's more than just a vacation -- *it's an event of a lifetime.*”
- Increased interest in night skies- dark skies- big skies
- Watch for night events at state parks, MSUB (was June 9th)
- Take advantage of local clubs
YVAA



Lewis & Clark Historic Trail Geotourism Project

- Based on Crown of the Continent and Greater Yellowstone Projects
- MapGuides feature the holistic range of destinations' attractions, activities, and place-based authenticity by promoting community based small and medium business that provide unique services to visitors.
- The program will use a stakeholder-driven process to create destination branded communication tools for the Trail, build a local constituency of destination ambassadors and storytellers, and work with them to support wise stewardship and promotion of the Trail.
- Stakeholders meetings are being planned for:

– 7/31: **Billings**



- Pompey's Pillar National Monument: showcases Clark's signature in the landmark's sandstone from their return trip East.
- Glendive: The Lewis & Clark Expedition spent their last night in Montana here by the Yellowstone in 1806.
- Rosebud: July 28, 1806 Wm. Clark passed Rosebud Creek on his way down the Yellowstone



2017 LEGISLATIVE IMPACTS TO MOTBD



Changes in Bed Tax Statutory Appropriation to the Montana Office of Tourism

	Prior to Session	Enacted by Session	Prior to Session*	Enacted by Session*	Variance
	Law	Law	FY 2018	FY 2018	FY 2018
SB 309 Indian Tourism Region	0.00%	0.50%	\$ -	\$ 98,656	\$ 98,656

(5) "Indian tourism region" includes the area recognized as being historically associated with the seven federally recognized reservations in Montana and the Little Shell Chippewa tribe.

15-65-121. Distribution of tax proceeds: 0.5% to the state special revenue account provided for in 90-1-135 for use by the state-tribal economic development commission established in 90-1-131 for activities in the Indian tourism region

*Revenue projection for Commerce by Joe Ramler, Senior Economist
5/8/17



Changes in Bed Tax Statutory Appropriation to the Montana Office of Tourism

	Prior to Session	Enacted by Session	Prior to Session*	Enacted by Session*	Variance
	Law	Law	FY 2018	FY 2018	FY 2018
SB 261 Implemented	0.00%	8.10%	\$ -	\$ 1,598,228	\$ 1,598,228

The amount of the fund transfer provided for in subsection (1)(a) is equal to 8.1% of the 64.9% that is distributed during the biennium beginning July 1, 2017, under 15-65-121(2)(d). The state treasurer may deposit the amount to the credit of the state general fund periodically during the biennium at the same time as the other distributions, as long as the total amount of the distribution at the end of each fiscal year is equal to 8.1% of the 64.9% of the tax proceeds distributed under 15-65-121(2)(d).

*Revenue projection for Commerce by Joe Ramler, Senior Economist
5/8/17



Changes in Bed Tax Statutory Appropriation to the Montana Office of Tourism

	Prior to Session	Enacted by Session	Prior to Session*	Enacted by Session*	Variance
	Law	Law	FY 2018	FY 2018	FY 2018
Department of Commerce	64.90%	56.30%	\$ 19,731,208	\$ 18,034,324	\$ (1,696,884)
SB 309 Indian Tourism Region	0.00%	0.50%	\$ -	\$ 98,656	\$ 98,656
SB 261 Implemented	0.00%	8.10%	\$ -	\$ 1,598,228	\$ 1,598,228

*Revenue projection for Commerce by Joe Ramler, Senior Economist
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