# *Big Sky Country*

# -- TOURISM IN MONTANA --

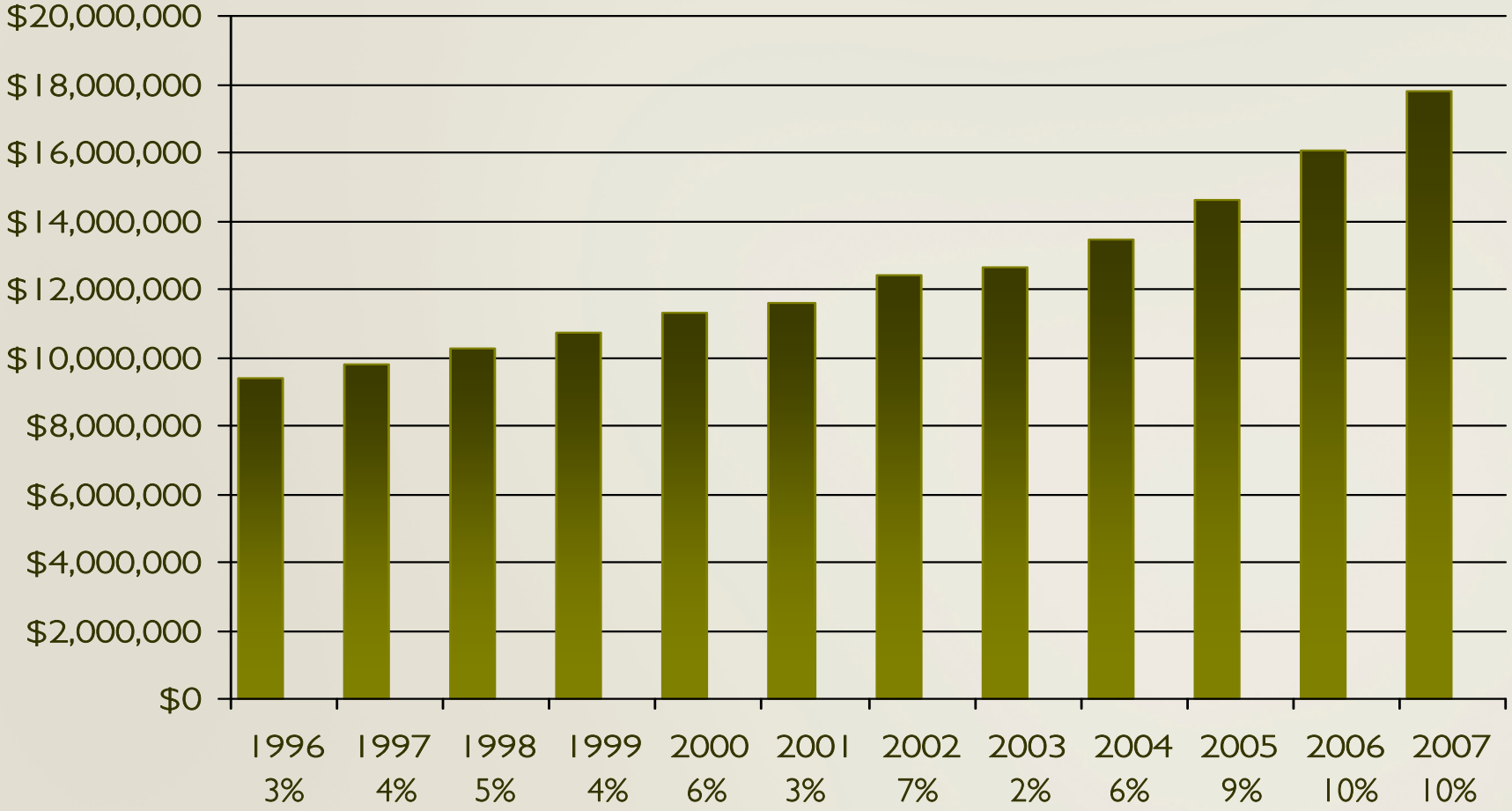
June 2008

# Bed Tax Revenue

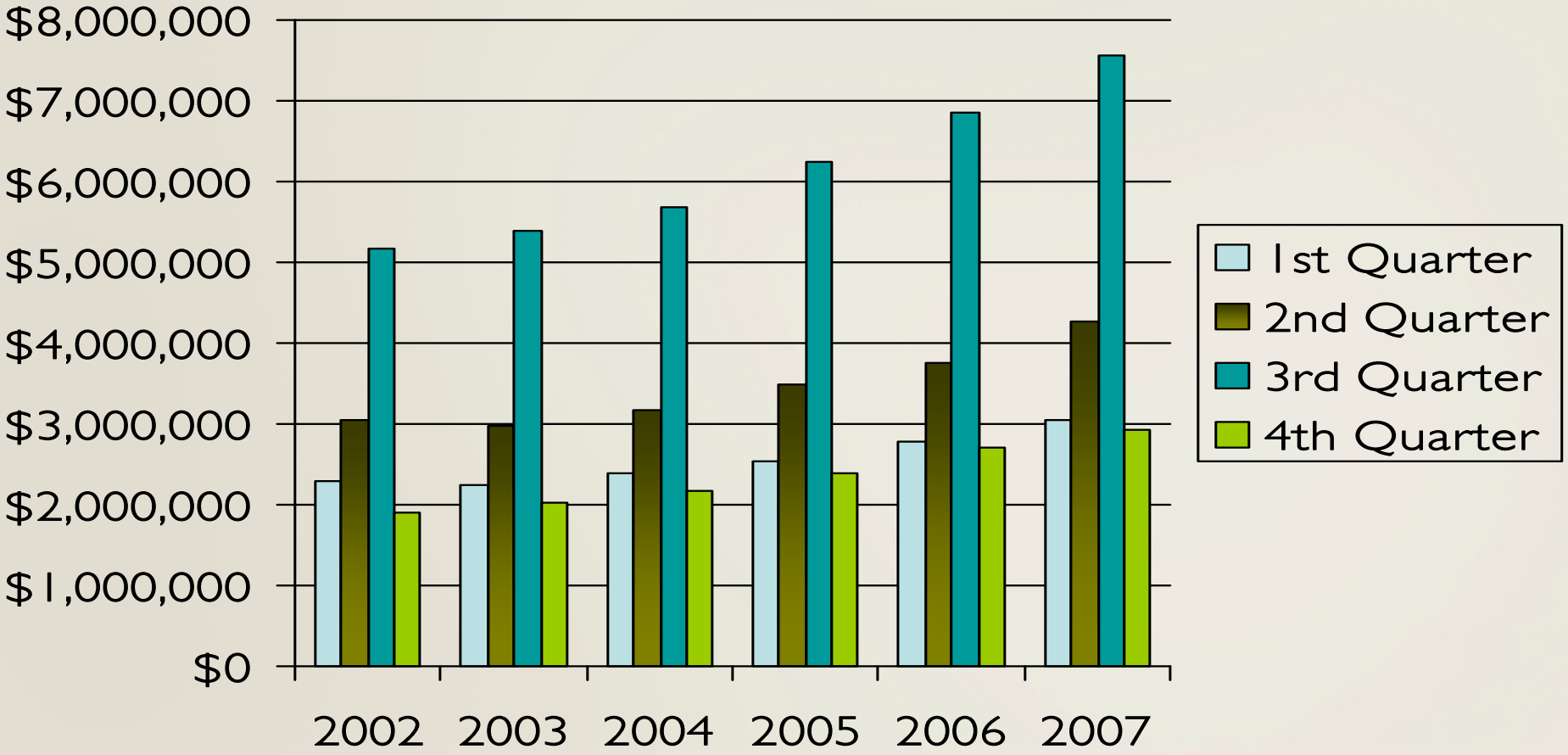
In 1988, the first year Montana collected the 4% Bed Tax, $4.8 million was generated.

In 2007, that figure was $17.8 million.

# Bed Tax Collections 1996-2007



# STATEWIDE BED TAX REVENUE



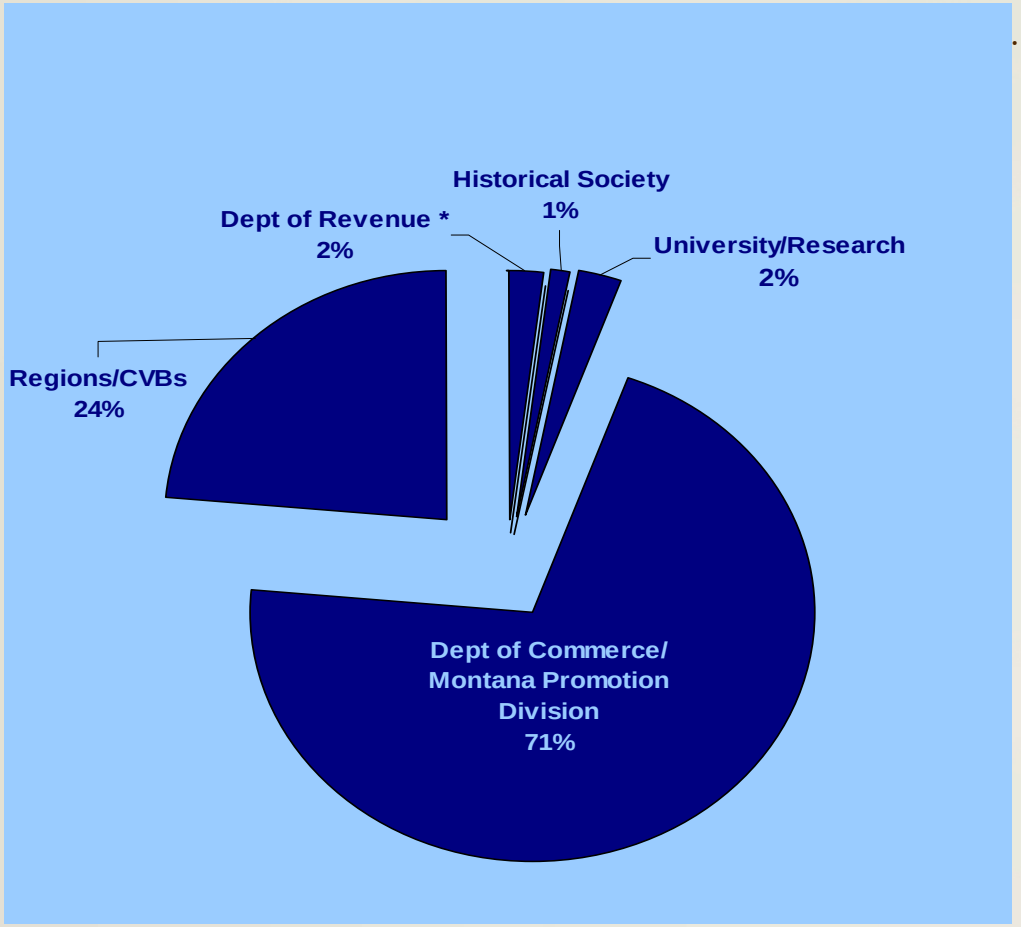
# Bed Tax Legislation

- 1987 Legislation
  - Enacted 4% Accommodations Tax (Bed Tax)
- 2003 Legislation
  - Enacted additional 3% to Bed Tax - totaling 7% Bed Tax
  - Tax reform to offset reduction in personal income tax and capital gains tax
  - New 3% goes directly into General Fund

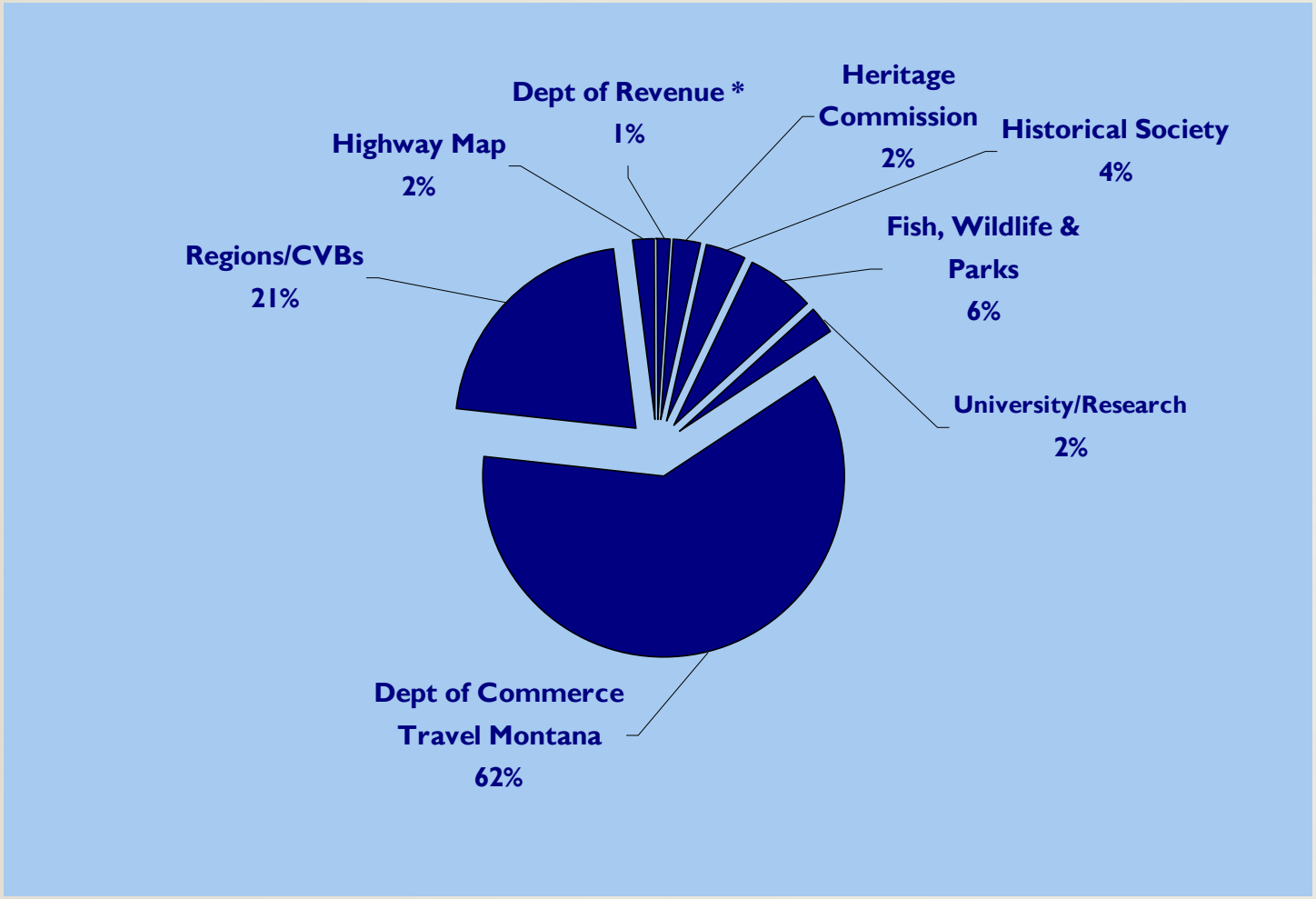
# Bed tax helps fund promotion and infrastructure via:

- Montana Historical Society
- Virginia City/Nevada City
- Montana State Parks
- Montana Trade Program
- University System (tourism research)
- Regions/CVBs
- Travel Montana

# Bed tax distribution FY88 (Original)



# BED TAX DISTRIBUTION
# FY07
## (INCLUDING ADMINISTRATIVE APPROPRIATIONS)



# Tourism is Competitive Business

State Tourism Promotion Budget Ranking

- FY93 - ranked 15th in the nation
- FY08 - ranked 32nd in the nation

MPD's promotion budget is 40% lower than our competitors

- FY08 average state tourism budget: $17,590,220
- FY08 MPD budget: $10,497,336

Source: TIA

# Montana's Opportunities

- Exchange rate has made the U.S. traveler more likely to stay in the U.S.
  - Montana is an affordable destination.
    - 9th most affordable destination in the U.S. (AAA)

- 1 in 4 Americans partake in outdoor recreation and/or visit a state or national park while on vacation
  (TIA Domestic Market Travel Report, 2003)
  - The two top sites visited in Montana are Yellowstone National Park and Glacier National Park. (ITRR)
  - 2007 was a banner year for visitation in both parks.

- RV travel is growing
  - One in ten RV owners, wants to visit Montana.
    (2005 Univ. of Michigan Study)
  - Despite increasing gas prices, RV vacations are more economical than other forms of vacation.
    (Recreation Vehicle Industry Association 2005 Study)

# Montana's Challenges

- While non-resident visitation has been growing, our percentage of vacationers has decreased.
  - From 2001-2005, those primarily in Montana for vacation decreased 8%. (From 41% to 34%).
    - VFR increased 14% to 19%
    - Passing-thru increased 24% to 27%

- Need to spread visitation into shoulder seasons

Source: ITRR

# Smith Travel Research Year to Date 2006-2007

| | Occupancy Percent | | |
|---|---|---|---|
| **Segment** | **2006** | **2007** | **% Chg** |
| United States | 63.3 | 63.2 | -0.2 |
| Mountain | 66.1 | 66.5 | 0.6 |
| Montana | 59.8 | 61.6 | 3.0 |
| Billings, MT Area | 63.8 | 67.2 | 5.3 |
| Bozeman/Yellowstone Area | 59.0 | 61.3 | 3.9 |
| Missoula/Butte | 60.9 | 62.7 | 3.0 |
| Helena/Great Falls | 61.5 | 63.1 | 2.6 |

# Smith Travel Research Year to Date 2006-2007

| | Average Room Rate | | |
|---|---|---|---|
| **Segment** | **2006** | **2007** | **% Chg** |
| United States | 97.89 | 103.64 | 5.9 |
| Mountain | 94.66 | 100.20 | 5.9 |
| Montana | 68.82 | 75.14 | 9.2 |
| Billings, MT Area | 63.36 | 68.74 | 8.5 |
| Bozeman/Yellowstone Area | 77.73 | 82.84 | 6.6 |
| Missoula/Butte | 68.75 | 75.04 | 9.1 |
| Helena/Great Falls | 65.55 | 70.68 | 7.8 |

# Smith Travel Research Year to Date 2006-2007

| | RevPAR | | |
|---|---|---|---|
| **Segment** | **2006** | **2007** | **% Chg** |
| United States | 61.96 | 65.50 | 5.7 |
| Mountain | 62.60 | 66.67 | 6.5 |
| Montana | 41.15 | 46.25 | 12.4 |
| Billings, MT Area | 40.45 | 46.22 | 14.3 |
| Bozeman/Yellowstone Area | 45.83 | 50.82 | 10.9 |
| Missoula/Butte | 41.86 | 47.02 | 12.3 |
| Helena/Great Falls | 40.30 | 44.62 | 10.7 |

# Smith Travel Research Year to Date 2006-2007

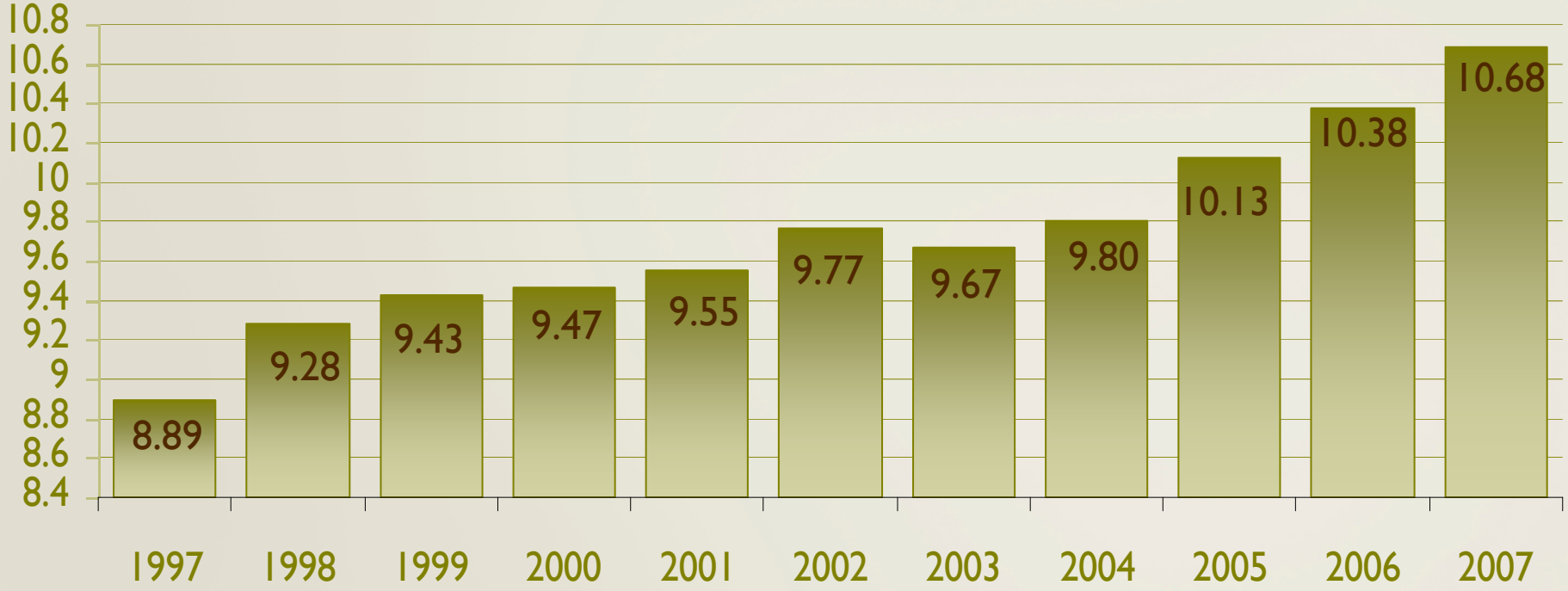
| | Rev | Supply | Dem |
|---|---|---|---|
| **Segment** | **% Chg** | **% Chg** | **% Chg** |
| United States | 7.2 | 1.4 | 1.2 |
| Mountain | 6.9 | 0.4 | 1.0 |
| Montana | 13.8 | 1.3 | 4.2 |
| Billings, MT Area | 15.4 | 1.0 | 6.4 |
| Bozeman/Yellowstone Area | 13.8 | 2.6 | 6.7 |
| Missoula/Butte | 10.7 | -1.4 | 1.4 |
| Helena/Great Falls | 10.6 | -0.1 | 2.6 |

# National Tourism Trends

- Niche Markets
  - Girlfriend Getaways, Mancations, Destination Weddings, Voluntourism, Pet Travel, Culinary Travel
- Geotourism
  - Authentic experiences
- Social Networking - Web 2.0
  - 73% of internet users used one or more social media tool in travel planning. (TIA/Am Ex 2007 Study)
- Green Tourism
  - More than 50% of Americans are more likely to select a business that practices environmental responsibility. (TIA/TravelHorizons 2007 Study)

# Non-Resident visitors

## in millions



# Visitors spent $3.1 billion in 2007

- That's over $3,000 for every man, woman and child in Montana.
- These expenditures produced $235 million in state and local taxes.
- That's a $631 tax subsidy per Montana household.

Population (CEIC 2007 estimate): 957,861
Montana household (CEIC 2007 estimate): 2.5 ppl
Total Households (CEIC 2007 estimate): 372,190

# Where does the $3.1 billion get spent?

- 28% Gas ..... $866.1 million
  *(which generates nearly 36% of Montana's state gas taxes)*
- 21% Restaurant ..... $656.0 million
- 16% Retail Sales ..... $485.6 million
- 9% Lodging ..... $288.5 million
- 8% Groceries ..... $260.8 million
- 5% Auto Rental/Repairs ..... $145.2 million
- 4% Outfitters/Guides ..... $133.2 million
- 8% Other ..... $250.1 million

# Visitor Expenditures create jobs

- Tourism supports 44,830 Montana jobs – 7% of the total work force.
- These jobs generate $1.05 billion in personal income.

# The effect ripples through your community

- The tourism industry spends money on legal and professional services, utilities, insurance, entertainment, food and beverage, automotive and much more.

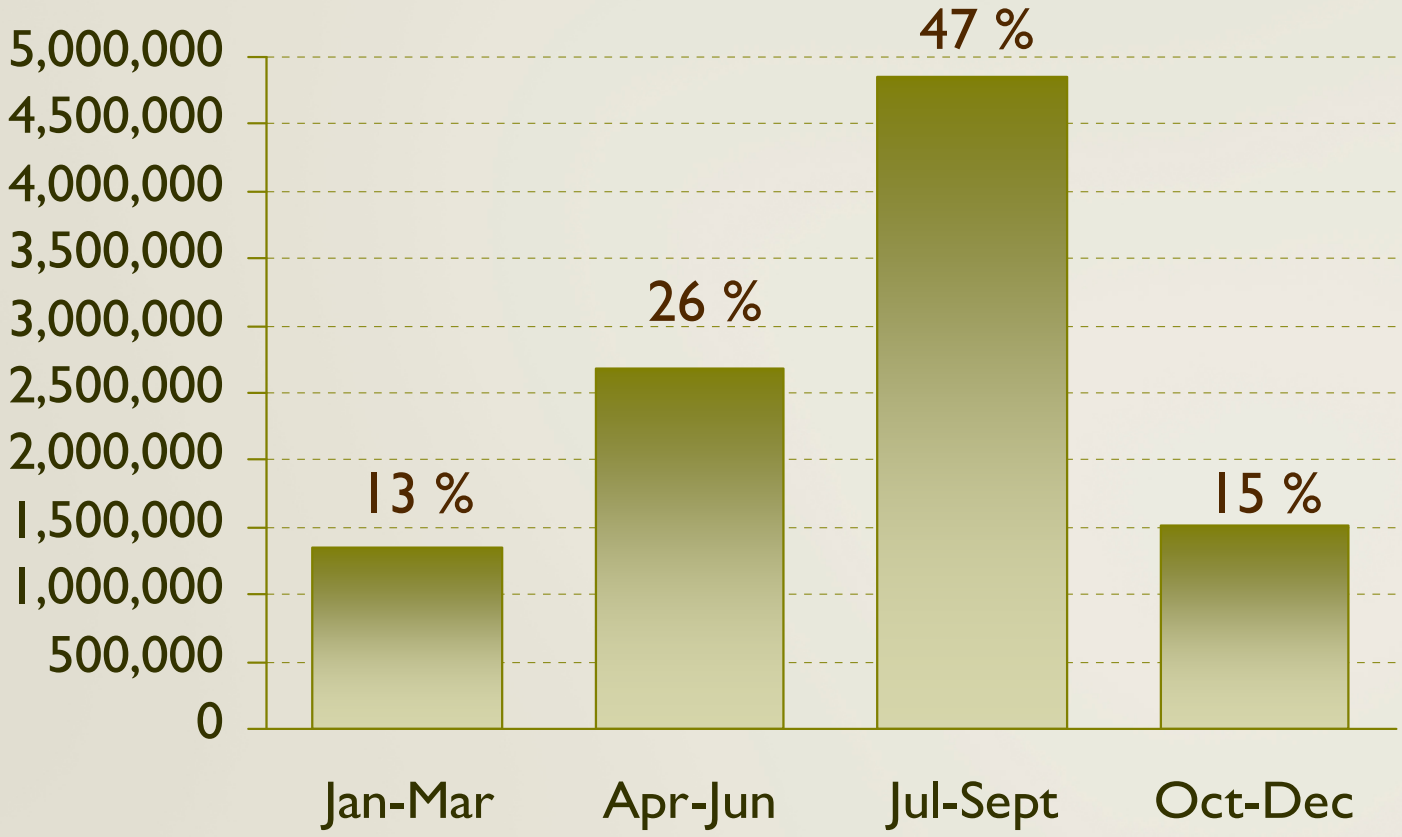
# Montana nonresident visitor facts

10.7 million nonresidents visited Montana in 2007.

Primary purpose of visit:

- 34% vacationers
- 19% visiting family and friends
- 13% business travelers
- 27% passing through
- 8% shopping, medical, other

# Nonresident visitors by season

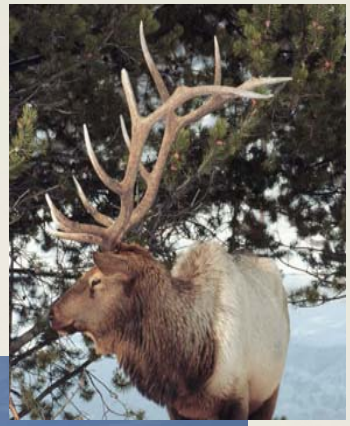


# Who is Our Visitor?

# Montana Visitor Facts

Primary Attractions for Vacationers:

22% Yellowstone NP
18% Mountains/Forests
16% Family & Friends
14% Glacier NP
13% Open Space
6% Wildlife/Fish



# Montana Visitor Facts

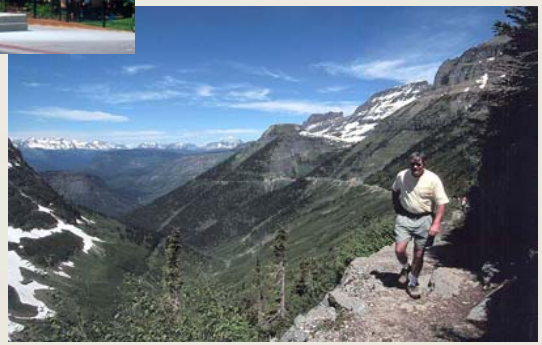
Top Sites Visited by Vacationers:

48% Yellowstone NP
29% Glacier NP
12% Little Bighorn Battlefield
10% Other Montana State Parks
8% Flathead Lake State Parks
8% Virginia/Nevada Cities

# Montana Visitor Facts

## Vacationers Top activities in Montana:

- Driving for pleasure
- Wildlife Watching
- Day Hikes
- Recreational shopping
- Picnicking
- Historic sites
- Museums
- Lewis & Clark sites
- Nature Study
- Camping
- Fishing



# Montana Visitor Facts

## Vacationers Place of Residence:

Washington (10%)
California (7%)
Idaho (7%)
Minnesota (5%)
Utah (5%)
North Dakota (4%)
Wyoming (4%)
Alberta (4%)
Colorado (4%)

# ITRR Report Builder

## itrr.umt.edu/reportbuilder.htm

Institute for Tourism and Recreation Research - Report Builder - Microsoft Internet Explorer

File Edit View Favorites Tools Help

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Address http://www.itrr.umt.edu/reportbuilder.htm Go

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- Customize Your Report
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- ITRR Reports
- MT Statistics
- Other Publications
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- Contact

### Nonresident Visitor Data Set (2005)

Data for this study has been weighted to represent the entire nonresident travel population. Information on data collection methods and analysis is found in Methods and Analysis - 2005 Nonresident Study Niche News.

**Report Builder Instructions:**

1) Select the type of report you would like to create from the following options: Expenditures, traveler demographics, trip characteristics, trip satisfaction, or trip planning.

2) Select your next search criteria from the following: All year, quarterly, location (travel region, county, city, or site), traveler characteristics (activities, purpose of trip, or what attracted vacationers to Montana), demographics (group type, age, income, or residence), or trip planning (flexibility on trip, media influence, sources used for planning or during the trip).

3) Select the report format of either PDF or Excel. You must have either Adobe Reader or Microsoft Excel on your computer to view the report. You can download Adobe Reader for free at the Adobe website.

4) **This is a work in progress. If you suspect a glitch in our program contact us immediately at itrr@umt.edu so the problem can be addressed. Also, please send all of your questions and feedback to the same email address. Thanks for your help.**

Continue to Reporting System

Internet

ITRR Reports - Microsoft Internet Explorer

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Address http://www.itrr.umt.edu/NonResident2005/ITRRSearch.aspx Go

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# Nonresident Travel Survey Reporting System

Go To ITRR Home Page ITRR

**1. Select the report to create:**

Trip Planning

- Trip Planning
- Trip Satisfaction
- Trip Characteristics
- Traveler Demographics
- Expenditures Report

**2**

**3. Select the report format:**

◉ PDF ○ Excel

Create Report

Done Internet

ITRR Reports - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Search Favorites

Address http://www.itrr.umt.edu/NonResident2005/ITRRSearch.aspx Go

Links

The University of Montana

ITRR

# Nonresident Travel Survey Reporting System

Go To ITRR Home Page

**1. Select the report to create:**

Trip Planning

**2. Select a search:**

Search All Year

- Search All Year
- Search By Quarter
- Search by Location
- Search by Traveler Characteristics
- Search by Traveler Demographics
- Search by Trip Planning

3

Create Report

Done

Internet

ITRR Reports - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Search Favorites

Address http://www.itrr.umt.edu/NonResident2005/ITRRSearch.aspx Go

Links

The University of Montana

ITRR

# Nonresident Travel Survey Reporting System

Go To ITRR Home Page

## 1. Select the report to create:

Trip Characteristics

## 2. Select a search:

Search by Location

Search by Travel Region | Search By County | Search By City | Search By Montana Site

*This search will limit the sample to travelers who:*

**Spent at least one night in the following cities** OR **Drove through the following cities**

☐ Big Sky ☐ Bozeman ☐ Dillon ☐ Great Falls ☐ Kalispell ☐ Missoula ☑ West Yellowstone

☐ Billings ☐ Butte ☐ Gardiner ☐ Helena ☐ Livingston ☐ Red Lodge ☐ Whitefish

## 3. Select the report format:

PDF Excel

Create Report

Internet

# Report for West Yellowstone
## Characteristics of Non-Residents

The University of Montana

ITRR

Friday, October 19, 2007

### Nonresident Traveler Characteristics Report

This report summarizes nonresident visitors to Montana who fit the following criteria:

*Spent at least one night in (cities): West Yellowstone*

This group represents a sample size of 424 respondents, or 7.1% of all nonresidents (736,372 visitors).

| Group Characteristics | |
|---|---|
| 67 % | are repeat visitors to MT |
| 67 % | plan to return within 2 years |
| 33 % | are first time visitors to MT |
| 27 % | rented an automobile |
| 27 % | flew on a portion of their trip |
| 9 % | hired an outfitter |
| 7 % | have lived in MT before |
| 6 % | own a 2nd property in MT |
| 4 % | rented an RV |
| 1 % | rented a motorcycle |
| 1 % | are purchasing property in MT |

| Sites Visited On Trip | |
|---|---|
| 92 % | Yellowstone National Park |
| 24 % | Glacier National Park |
| 18 % | Virginia/Nevada City |
| 9 % | Other Montana State Parks |
| 9 % | Little Bighorn Battlefield |
| 6 % | Museum of the Rockies, Bozeman |
| 6 % | Flathead Lake State Parks |
| 5 % | Lewis & Clark Caverns |
| 4 % | Lewis & Clark Interpretive Ctr, Great Falls |
| 4 % | Missouri Headwaters State Park |
| 4 % | National Bison Range |
| 4 % | Lolo Pass Interpretive Center |
| 3 % | Big Hole Battlefield |
| 3 % | Bighorn Canyon Nat'l Recreation Area |
| 3 % | Clark Canyon Reservoir |
| 3 % | Bob Marshall Wilderness |
| 2 % | Lost Trail Pass |
| 2 % | Pompey's Pillar |
| 2 % | MT Historical Museum, Helena |
| 2 % | Lemhi Pass |
| 2 % | Fort Peck Lake |
| 1 % | Bannack State Park |
| 1 % | Makoshika State Park |

| Activities | |
|---|---|
| 65 % | driving for pleasure |
| 63 % | wildlife watching |
| 43 % | shopping |
| 42 % | picnicking |
| 38 % | day hiking |
| 36 % | visiting historical sites |
| 26 % | visiting museums |
| 25 % | nature study |
| 24 % | developed camping |
| 21 % | visiting L&C sites |
| 17 % | fishing/fly fishing |
| 11 % | visiting Native American sites |
| 9 % | snowmobiling |
| 9 % | birding |
| 8 % | visiting festivals or events |
| 6 % | gambling |
| 6 % | road/tour biking |
| 6 % | horseback riding |
| 5 % | river rafting/floating |
| 5 % | backpacking |
| 4 % | primitive camping |
| 4 % | canoeing/kayaking |
| 3 % | mountain biking |
| 3 % | motorboating |
| 3 % | art exhibits |
| 3 % | sporting event |
| 2 % | attending performing arts |
| 1 % | off highway riding/ATV |
| 1 % | golfing |
| 1 % | downhill skiing |
| 1 % | cross-country skiing |

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The University of Montana – Missoula
Phone (406) 243-5686



The University of Montana

ITRR

Friday, October 19, 2007

Nonresident Traveler Characteristics Report

| Reasons for trip | |
|---|---|
| primary | all |
| 82 % | Vacation/recreation/pleasure 94 % |
| 6 % | Just passing through 15 % |
| 5 % | Business/convention/meeting 5 % |
| 5 % | Visit friends/relatives/family event 16 % |
| 2 % | Other 5 % |
| 0 % | Shopping 5 % |

| Length of stay | |
|---|---|
| | Of nights spent in MT |
| 73 % | of nights spent in Yellowstone Country |
| 13 % | of nights spent in Glacier Country |
| 6 % | of nights spent in Gold West Country |
| 4 % | of nights spent in Custer Country |
| 2 % | of nights spent in Russell Country |
| 1 % | of nights spent in Missouri River Country |

| Lodging: Of nights spent in MT | |
|---|---|
| 61 % | Hotel/motel |
| 13 % | Private campground |
| 6 % | Home of friend/relative |
| 6 % | Public land camping |
| 5 % | Rented cabin/home |
| 3 % | Second home/condo/cabin |
| 2 % | Resort/condo |
| 2 % | Guest ranch |
| 1 % | Vehicle in parking area |
| 0 % | Other |

| If on vacation, attracted to Montana for ... | | Primary Attraction |
|---|---|---|
| 90 % | Yellowstone National Park | 62 % |
| 55 % | Mountains/forests | 11 % |
| 36 % | Open space/uncrowded areas | 6 % |
| 31 % | Rivers | 0 % |
| 27 % | Glacier National Park | 10 % |
| 25 % | Wildlife/fish | 3 % |
| 22 % | Lakes | 1 % |
| 14 % | Lewis & clark sites | 1 % |
| 12 % | Family/friends | 4 % |
| 10 % | Native american history &culture | 0 % |
| 9 % | MT history & culture | 0 % |
| 6 % | Northern great plains/Badlands | 0 % |
| 3 % | A Montana State Park | 0 % |
| 2 % | Resorts | 0 % |
| 2 % | Dude/guest ranch | 1 % |
| 2 % | Special events | 1 % |

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# Montana's Partners in Tourism Promotion

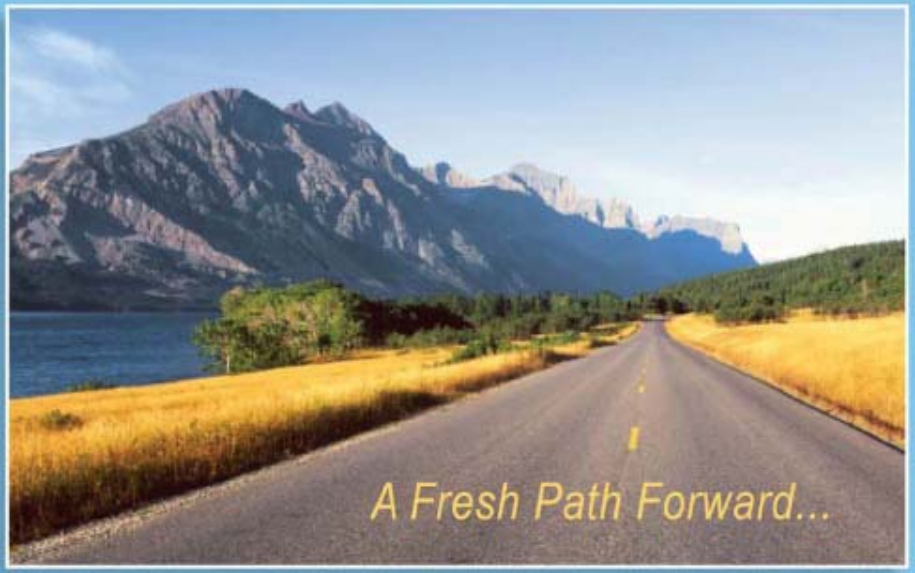
Montana is divided into SIX tourism regions

and

ELEVEN Convention and Visitors Bureaus

(CVBs)

# State - Regions - CVBs



MONTANA
BIG SKY COUNTRY

# Tourism and Recreation Strategic Plan 2008-2012

Prepared for Montana's Tourism & Recreation Partnership Stakeholders

# Strategic Plan Purpose

- Define VISION
- Identify GOALS and ACTIONS
- Set PRIORITIES
- Assign RESPONSIBILITIES
- Ask BIG PICTURE questions…

The purpose of the Strategic Plan was to determine Montana's desire for what tourism should become by 2012 and then identify a path to get there.

# Goals for Tourism & Recreation 2008-2012

1. Increase four-season tourism revenues statewide through effective marketing and promotions, focusing on high-value, low impact visitors
2. Attain public policy and citizen support for sustainable tourism and recreation
3. Address management and access issues for sustainable recreation on state and federal lands
4. Enhance and preserve Montana's culture and history (historic sites, museums, art, music, etc.)
5. Support appropriate business growth, including new tourism products and services for target customer markets

# Goals for Tourism & Recreation 2008-2012

6. Address tourism and recreation professional development, workforce availability, and affordable housing issues
7. Improve Montana's transportation system for both residents and visitors
8. Enhance the "curb appeal" of Montana communities to attract visitors
9. Enhance funding to maintain sustainable tourism and recreation in Montana
10. Build an effective "team" to implement the Strategic Plan, and report results

# High-Value/Low-Impact

"High-Value/Low-Impact visitors" are defined as visitors who seek a quality experience, stay longer, spend more per day, and respect Montana's natural and cultural assets.

# Uncovering Montana's Brand

# A Brand .....Is

- Essential attributes that distinguish a product, good or service from its competitors
- Direct/indirect consumer experience
- Consumer perception of people who use the product
- Strategic roadmap for advertising, marketing and promotion

# A Brand…..is NOT!

- Advertising slogan or tagline
- Clever play on words that requires explanation
- Consensus statement that captures every possible attribute, instead of the strongest
- Something that changes from year to year

# Branding process

- Branding Advisory Committee
  - Strategic Plan goals
  - ITRR research
- Out-of-state Focus Groups (Aug)
- In-state Stakeholder Workshops (Nov)
- Branding Advisory Committee Summit (Dec)
  - Summary of consumer research & stakeholder workshops.
  - Presentation of draft branding statements

# Branding process

- Consumer Testing of Branding Statements (Feb)
  - Online, out-of-state market test interviews
- Presentation of final Brand Statements (Mar)
- Refining of final Brand Statements (Apr)
- Public presentation of final Brand Statements
  - Governor's Conference on Tourism & Recreation, West Yellowstone, April 19, 2008

# WHAT MONTANA OFFERS

## ATTRIBUTES

**STRENGTHS (in vacuum)**

- Natural beauty (Glacier, Water, Mountains)
- Open spaces
- Wildlife - diverse/abundant
- Fewer people
- Rugged perception/wild flavoring/Old West
- People (friendly, easy going, laid back)
- National parks/monuments
- Recreation/outdoors
- Unique historic and natural aspects
- Art culture and cultural opportunities

**WEAKNESSES**

- Remote
- Don't look like me
- Lack high touch customer service
- Unfamiliar
- Not different enough
- Perceived risk
- Inconveniences

MONTANA
BIG SKY COUNTRY

# Final Brand Platform

- More spectacular unspoiled nature than anywhere else in the lower 48 United States
- Vibrant and charming small towns that serve as gateways to the natural wonders
- Breathtaking experiences by day, relaxing hospitality at night

# Final Brand Platform

- More spectacular unspoiled nature than anywhere else in the lower 48
  - Key Point of Differentiation
  - Builds on the core strength of the Montana tourism product
  - Leverages positive associations with Alaska
  - Captures "spirit of adventure" "great outdoor experience" and "unbeaten path"
  - Need to "iconify" 8 – 10 particular locations
    - Glacier NP, Yellowstone NP, Flathead Lake, Bob Marshall, Bitterroot, Continental Divide, etc
    - Crown of the Continent is a strong start

# Final Brand Platform

- Vibrant and charming small towns that serve as gateways to the natural wonders
  - Mitigates "remote" with image of pockets of visitor services
  - Captures "comfort" and "charm" needs of audience
  - Shifts focus from communities as destinations to communities as gateways

# Final Brand Platform

- Breathtaking Experiences By Day
  - Conveys exhilaration
  - Both physically and/or visually breathtaking, depending on the interests of the audience
  - Leverages "spectacular unspoiled nature" into a personal experience
  - "Experiences" not "adventures"
    - "Experiences" is softer, broader, more accessible than "adventures"

# Final Brand Platform

- Relaxing hospitality at night
  - Low key
    - Conveys comfort, sense of warmth, welcome
  - Not lavish or lush
    - That's not credible with the audience
- Day/Night
  - Suggestive of a balance between exhilaration and comfort
  - Not meant to be restrictive

# Final Brand Platform

- Using the Brand Platform
  - Example: Las Vegas
    - Unique adult entertainment escape (Brand)
    - ↓
    - What Happens Here, Stays Here (Creative)
  - Internal Road Map
    - Not consumer focused language
  - The focus is on first time visitors
    - Strongest appeal to convert non-visitor targets to visitors
    - Repeat visitors will explore depth and breadth of the Montana offering

# Final Brand Platform

- Designed to work together
  - Statement One - Differentiator
    - Distinguishes Montana from competitor states
  - Statement Two  - Mitigator
    - Mitigates “remote” without denying it
  - Statement Three – Brand Builder
    - Leverages strengths (nature) to drive up qualities audience desires (comfort, exhilaration)

# Final Brand Platform

- Personalizing the story
  - Role for the people of Montana in the creative expression of the brand
  - Testing did not evaluate messengers, it evaluated message
  - Passionate Montanans can be strong messengers for the state, if they convey the brand platform
- United we stand……..
  - $76 million in annual Montana tourism promotion
    - Major marketing weight IF unified around the brand platform
    - Major confusion in the marketplace if NOT unified around the brand platform

# Next Steps

- Brand Guidebook
  - Fall 2008
- Statewide roadshow and training
  - Fall 2008
- New Travel Montana Creative
  - December 2008
- Follow Up Tools and Templates
  - Spring 2009

# Full branding presentation can be viewed at:

www.travelmontana.org/branding

# Consumer Marketing

# 2008
# Warm Season Campaign

# Campaign Strategy

- Consistency across all TM promotions
- Limited dollars => super-targeted strategy
- Variety of media to reach geo- and lifestyle-targeted audiences

# Warm Season Consumer Campaign

- National Campaign
- Key Market Campaign
- 3 Parks

# National Campaign

- Print
- Internet
- Web Development

# Print Campaign

## Segments

- Traditional (Family)
- Active Mature
- RV / Camping
- Photography
- Outdoor Enthusiasts
- History / Culture
- In-flight
- Removed Bridal segment

# Print Campaign

**Publications**

- AAA Tourbook
- AARP Magazine
- Alaska/Horizon Air
- History Channel
- Audubon
- Backpacker
- Budget Travel
- Better Homes & Gardens
- Good Housekeeping
- Madden Newspaper Insert
- National Geo Adventure
- National Geo Traveler
- NY Times T: Travel
- Outside
- Popular Photography
- Trailer Life
- Smithsonian
- Sunset
- Travel & Leisure

# Print Co-ops

**Good Housekeeping (8-page special section)**

- Butte CVB
- Helena CVB
- Missoula CVB
- Custer Country
- Glacier Country
- Gold West Country
- Missouri River Country
- Russell Country
- Private partners: Glacier Park, Inc. & Red Lion Hotels

# Print Co-ops
## cont'd

**Madden Pre-Print (8-page Newspaper Insert)**

- Butte CVB
- Bozeman CVB
- Custer Country
- Glacier Country
- Gold West Country
- Great Falls CVB
- Helena CVB
- Missoula CVB
- Missouri River Country
- Russell Country
- Private Partners: Best Western Montana Hotels, Big Sky Resort, Fairmont Hot Springs, Best Western KwaTaqNuk Resort

# Print Co-ops
## cont'd

**Audubon (5-page special section)**

- Bozeman CVB
- Missoula CVB
- Custer Country
- Glacier Country
- Missouri River Country
- Russell Country

# Print Co-ops
## cont'd

**National Geographic Traveler (one-page co-op)**

- Big Sky CVB
- Bozeman CVB

**Sunset (one-page co-op)**

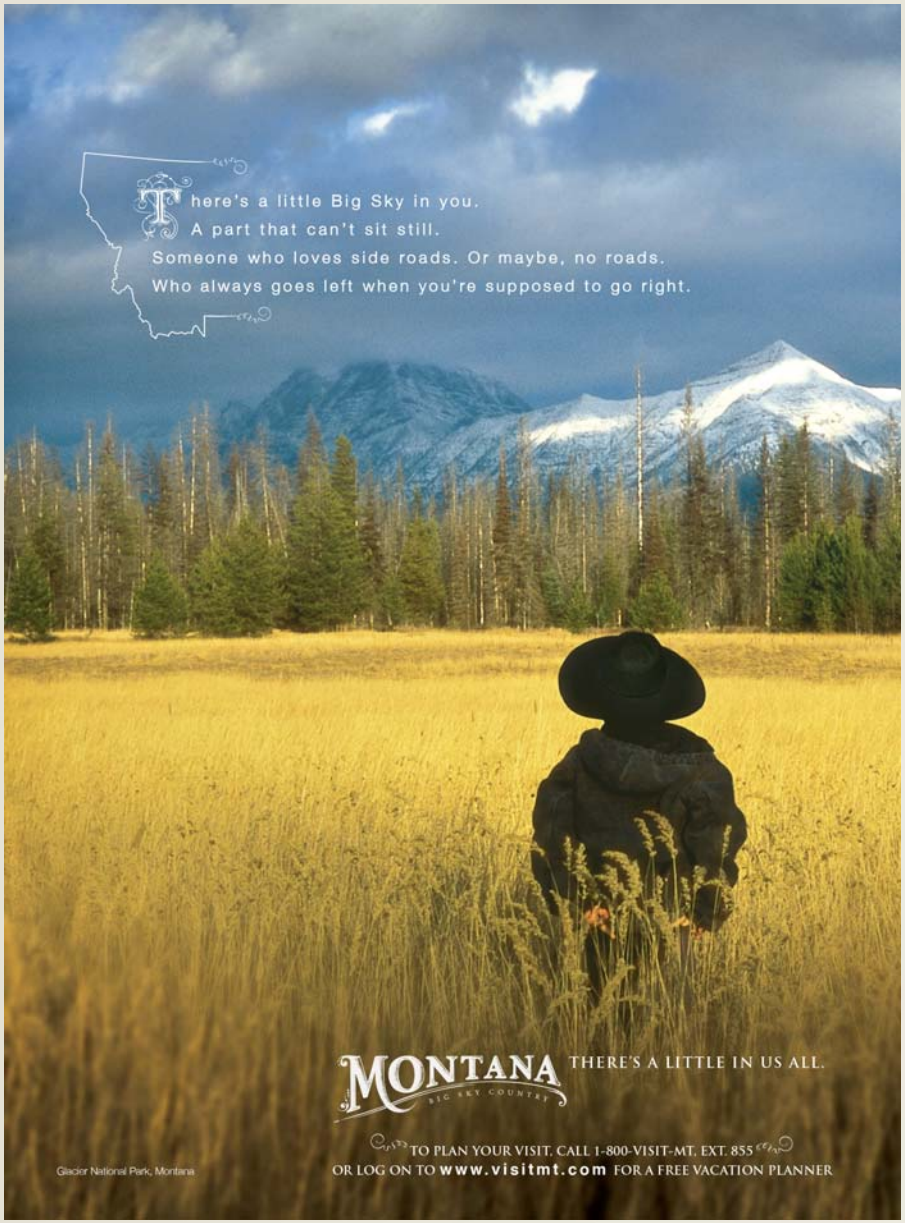
- Big Sky CVB
- Bozeman CVB

**Travel & Leisure Family (one-page co-op)**

- Helena CVB
- Russell Country

# Print Campaign

- Campaign runs Feb 08 through July 08
- $1,022,620.73
  - Co-op contribution: $32,722.18 (3% of total)
- Circulation: 22,329,968
- CPM: $45.80




# Warm Season Print

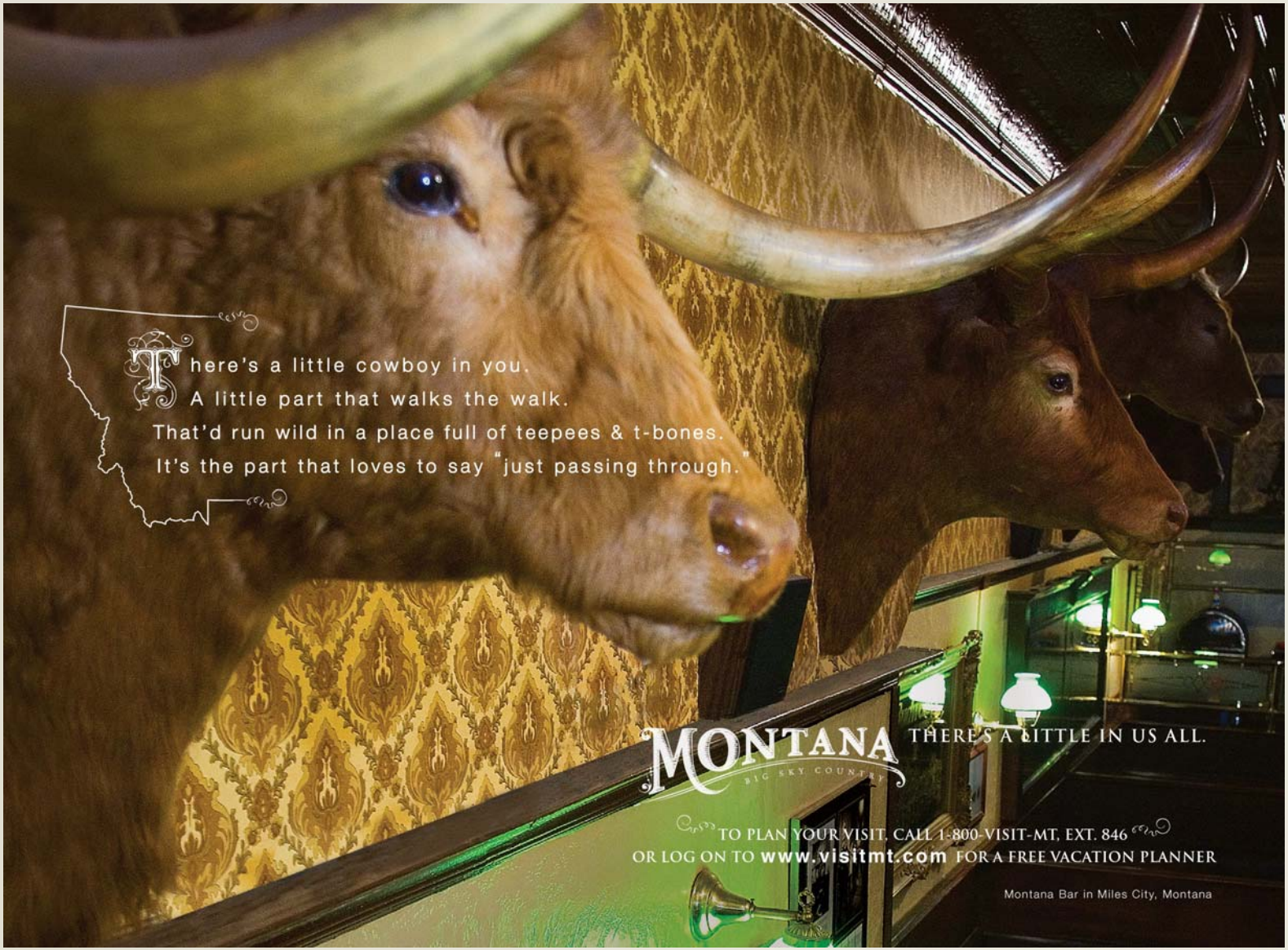
MONTANA
BIG SKY COUNTRY

Montana Promotion Division · Department of Commerce

# Warm Season Print

MONTANA
BIG SKY COUNTRY

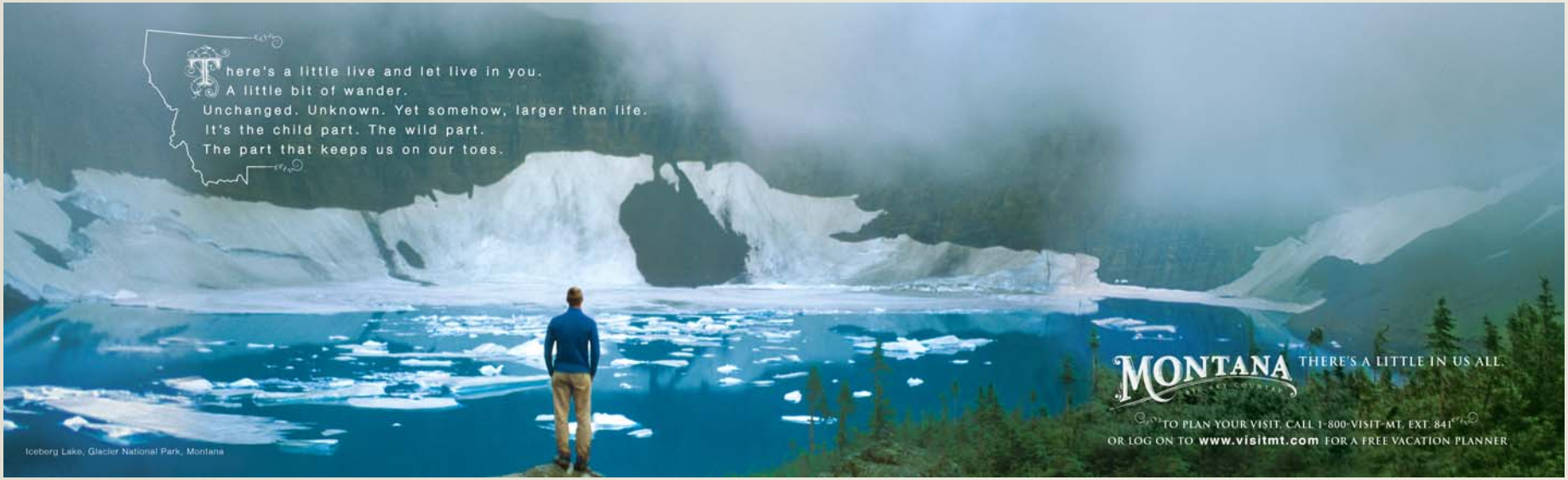
Montana Promotion Division · Department of Commerce




# Warm Season Print

MONTANA
BIG SKY COUNTRY

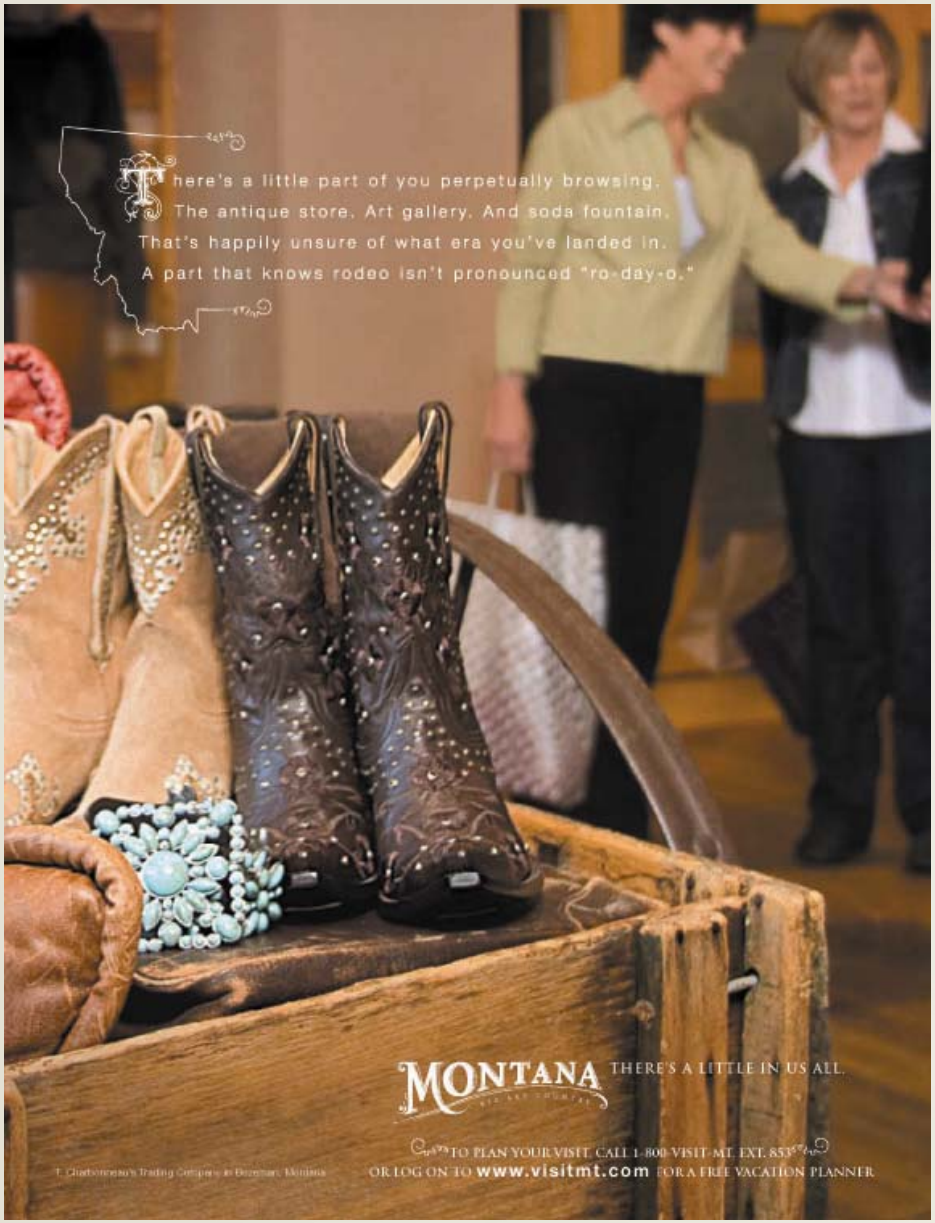
Montana Promotion Division · Department of Commerce




# Warm Season Print

MONTANA
BIG SKY COUNTRY

Montana Promotion Division · Department of Commerce




# Warm Season Print

MONTANA
BIG SKY COUNTRY

Montana Promotion Division · Department of Commerce

*Special Advertising Section*

## UPCOMING EVENTS

**GARDEN CITY BREWFEST**
(Missoula) May 3, 2008

**LEWIS & CLARK INTERPRETIVE CENTER 10TH ANNIVERSARY**
(Great Falls) May 4, 2008

**LIVING HISTORY WEEKENDS**
(Nevada City & Virginia City) Every weekend starting May 23 – Labor Day

**MONTANA DINOSAUR FESTIVAL**
(Malta) June 6-7, 2008

**RED LODGE MUSIC FESTIVAL**
(Red Lodge) June 7-15, 2008

**RED BOTTOM CELEBRATION**
(Frazer) June 20-22, 2008

**LIBBY LOGGER DAYS**
(Libby) June 26-28, 2008

**CUSTER'S LAST STAND REENACTMENT**
(Hardin) June 27-29, 2008

**AUGUSTA AMERICAN LEGION RODEO & PARADE**
(Augusta) June 29, 2008

**NATIONAL FOLK FESTIVAL**
(Butte) July 11-13, 2008

**SUMMERFAIR**
(Billings) July 12-13, 2008

**BITE OF BOZEMAN**
(Bozeman) July 30, 2008

## *Montana Tourism Resources:*

**MONTANA TOURISM OFFICE**
1-800-VISIT-MT, ext. 825
visitmt.com

**RUSSELL COUNTRY**
1-800-527-5348
russell.visitmt.com

**HELENA CVB**
1-800-743-5362
gohelena.com

**GLACIER PARK, INC.**
406-892-2525
glacierparkinc.com

**GOLD WEST COUNTRY**
1-800-879-1159, ext. 807
goldwest.visitmt.com

**MISSOURI RIVER COUNTRY**
1-800-653-1319
missouririvervisitmt.com

**BUTTE CVB**
1-800-735-6814
buttecvb.com

**BEARTOOTH HARLEY-DAVIDSON/BUELL**
1-877-292-0562
beartoothrentals.com

**GLACIER COUNTRY**
1-800-338-5072
glaciermt.com

**CUSTER COUNTRY**
1-800-346-1876, ext. 508
custercountry.com

**MISSOULA CVB**
1-800-526-3465, ext. GH7
missoulacvb.org/house

**RED LION HOTELS**
1-800-RED-LION
redlion.com


**WE'LL GIVE YOU A NICE, COMFORTABLE ROOM TO STAY IN.**

**AND 1,872 REASONS TO LEAVE IT.**

You won't want to leave when you stay at a Red Lion, but with our new online destinations guide, it will be hard not to. Find Montana's best attractions, restaurants, events and more just a click away when you visit us online. And, after you've seen the Treasure State's finest, relax in our new guest rooms, complete with plush pillowtop beds, triple sheeting, granite baths, ergonomic workspaces and free high-speed wireless Internet. Visit us today to see it all and **STAY COMFORTABLE.**

redlion.com • 800-Red Lion

GUESTAWARDS®

RED LION® HOTELS

Montana Destinations: Helena • Kalispell • Missoula

900/1106


# Good Housekeeping Co-op

MONTANA BIG SKY COUNTRY

Pelicans congregate at the Medicine Lake National Wildlife Refuge in Northeastern Montana. Photographer: Donnie Sexton

world's last free-roaming black-footed ferret populations. And just south of Glendive, turkey vultures soar over Makoshika State Park, while chipping sparrows, Bullock's orioles and cedar waxwings fill the air with song.

As you head west towards Billings, don't forget your spotting scope! Pompeys Pillar National Monument offers a variety of birds on the Bureau of Land Management sensitive species list such as the ferruginous hawk, Franklin's gull, Forster's tern, loggerhead shrike, northern goshawk and the peregrine falcon. Gracing the stark prairies and plateaus north of Billings is the Lake Mason National Wildlife Refuge with long-billed curlews, sage grouse and upland sandpipers.

Montana is a different kind of place. A place more comfortable with habitat than highways. A place where endangered species seem less so. Montana offers the most abundant and diverse wildlife experience in the lower 48 states. From birds to bears, from west to east, it is an unrivaled brush with the fauna of North America.

## *Montana Tourism Resources:*

**MONTANA TOURISM OFFICE**
1-800-VISIT-MT, ext. 826
visitmt.com

**GLACIER COUNTRY**
1-800-338-5072
explore.glaciermt.com

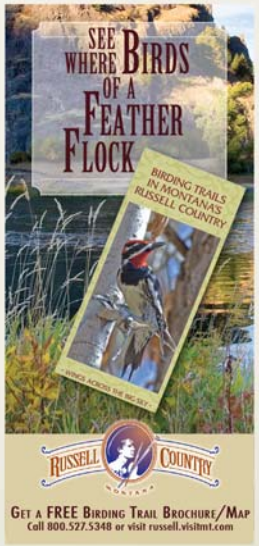
**RUSSELL COUNTRY**
1-800-527-5348
russell.visitmt.com

**MISSOURI RIVER COUNTRY**
1-800-653-1319
missouririver.visitmt.com

**CUSTER COUNTRY**
1-800-346-1876, ext. 808
custercountry.com

**MISSOULA CVB**
1-800-526-3465, ext. AN7
missoulacvb.org/audubon

**BOZEMAN CVB**
1-800-228-4224, ext. 803
am.visitbozeman.net



# Audubon Co-op

MONTANA
BIG SKY COUNTRY

There's a little Big Sky in you.
A part that can't sit still.
Someone who loves side roads. Or maybe no roads.
Who always goes left when you're supposed to go right.

MONTANA BIG SKY COUNTRY THERE'S A LITTLE IN US ALL.

Glacier National Park, Montana

TO PLAN YOUR VISIT, CALL 1-800-VISIT-MT, EXT. 828
OR LOG ON TO **www.visitmt.com** FOR A FREE VACATION PLANNER

Montana Helena

**IN HELENA, YOU'LL FIND A LITTLE BIT OF NEW AND A LITTLE BIT OF GOLD.**

Helena is that rare modern city that retains her legacy through an array of history and culture. From our provocative museums to our charming shops and delectable restaurants, we'll keep you fascinated in one of America's "Best Little Art Towns." We're between Yellowstone and Glacier National Parks. For a free planner, call **1-800-743-5362** or visit **www.gohelena.com.**

RUSSELL COUNTRY MONTANA

**BOOK A PLEASURE CRUISE IN MONTANA'S RUSSELL COUNTRY.**

Vacation in one of Big Sky Country's hottest destinations, Russell Country, where our legendary outdoor recreation and gracious people will have you coming back year after year. Each season holds the promise of a new Montana-style adventure for every member of your family. For a free planner, call **1-800-527-5348** or visit **www.russell.visitmt.com.**

# Travel & Leisure Family Co-op

MONTANA BIG SKY COUNTRY

Montana Promotion Division · Department of Commerce

*Celebrate National Trails Day in*

# MONTANA

BIG SKY COUNTRY

In a state that's as big as all outdoors, you shouldn't be surprised to find that hiking and backpacking are the preferred leisurely pursuits here. Long backpacking trips and short hikes through millions of acres of national forest and numerous wilderness areas are a rite of passage (or perfect date) for many Montanans. First kisses, wedding vows and even a business plan or two have all been hatched when some fun-loving Montanan felt the urge to "get out for awhile."

Montana's most famous backpacking destination is Glacier National Park. The park's main thoroughfare, Going-To-The-Sun Road, serves as a veritable 52-mile-long trailhead to more than 700 miles of trails. Most people leave the car behind to access a seemingly

Bull elk bugling in Yellowstone National Park. Photographer: Jason Lugo

endless myriad of short nature walks, day hikes and multi-day slogs deep into unspoiled backcountry. All are reasons why Glacier is often deemed "The Backpacker's National Park." And rightfully so.

In contrast, Yellowstone National Park is set up for motorists. The area is roughly 63 miles north to south and 54 miles east to west- bigger than Rhode Island and Delaware combined – and interconnected nicely by a figure-eight loop. This provides a nice segue for those who like to get off the beaten path – over 1,000 miles of trails lead in every direction. Easy half-day jaunts are typified by wildlife viewing and expansive valleys; other trails require know-how, backcountry skill and a set of fully functioning lungs.

Lemhi Pass, Bitterroot Mountains, Montana. Photographer: Donnie Sexton

Being bookended by two national treasures, some would be hard-pressed to hike anywhere else. But thanks to three million acres of designated wilderness, Montana is a virtual backpacker's decathlon. Areas to explore include the Bob Marshall Wilderness, south of Glacier National Park; the Bitterroot Mountains, south of Missoula; the Absaroka-Beartooth Wilderness, north of Yellowstone; the Crazy Mountains, east of Bozeman and Makoshika State Park, east of Glendive. For complete listings, visit www.fs.fed.us/r1

As passionate as Montanans are about wild places, they're equally passionate about protecting them. Nine Montana organizations including REI-Missoula and the Bob Marshall Wilderness Foundation are hosting National Trails Day events on July 7. National Trails Day is a long-standing celebration of America's magnificent trail systems and the countless supporters and volunteers that make it possible.

Thanks to conservation efforts, seven million acres of roadless wilderness make Montana the perfect place to celebrate National Trails Day, every day. So if you ever find yourself muttering, "I need to get out for awhile," we understand. There's a little Montana in us all. Some of us just don't know it yet.

For a complete list of National Trails Day events in Montana, visit www.americanhiking.org/events

WWW.VISITMT.COM

## Backpacker Advertorial Spread

MONTANA BIG SKY COUNTRY

Montana Promotion Division · Department of Commerce

# Building Consistency

*Special Advertising Section*

# MONTANA
BIG SKY COUNTRY

RECONNECT WITH YOUR INNER CHILD OR GIVE YOUR KIDS A WINTRY EXPERIENCE THEY'LL NEVER FORGET.

## WINTER THE WAY YOU REMEMBER IT

Remember catching snowflakes on your tongue when you were a kid? How about making "snow angels" in a blanket of fresh fluff? And when was the last time you went sledding...down a neighborhood hill, behind a horse-drawn sleigh, or perhaps behind a string of excited doggies? With the down-home hospitality you remember from childhood and a healthy dose of the new and pleasantly unexpected, the magic of winter and all its possibilities comes to life in sparkling, sunny Montana.

Montana serves up something to satisfy every passion, from skiing and snowboarding to natural hot spring soaking. Cross-country ski, snowmobile or take a snowcoach into Yellowstone National Park and witness steam breathing bison. Kick back for a day of soaking and spa therapy at one of Montana's natural hot springs resorts. How about snowshoeing into the winter solitude of Glacier National Park or snowmobiling through the Big Sky state's expansive national forests? Ever dream of climbing a frozen waterfall amidst a backdrop of crystallized peaks and snow-heavy valleys? Visitors to Montana will find all of this perched on a backdrop of quaint towns with genuinely hospitable people.

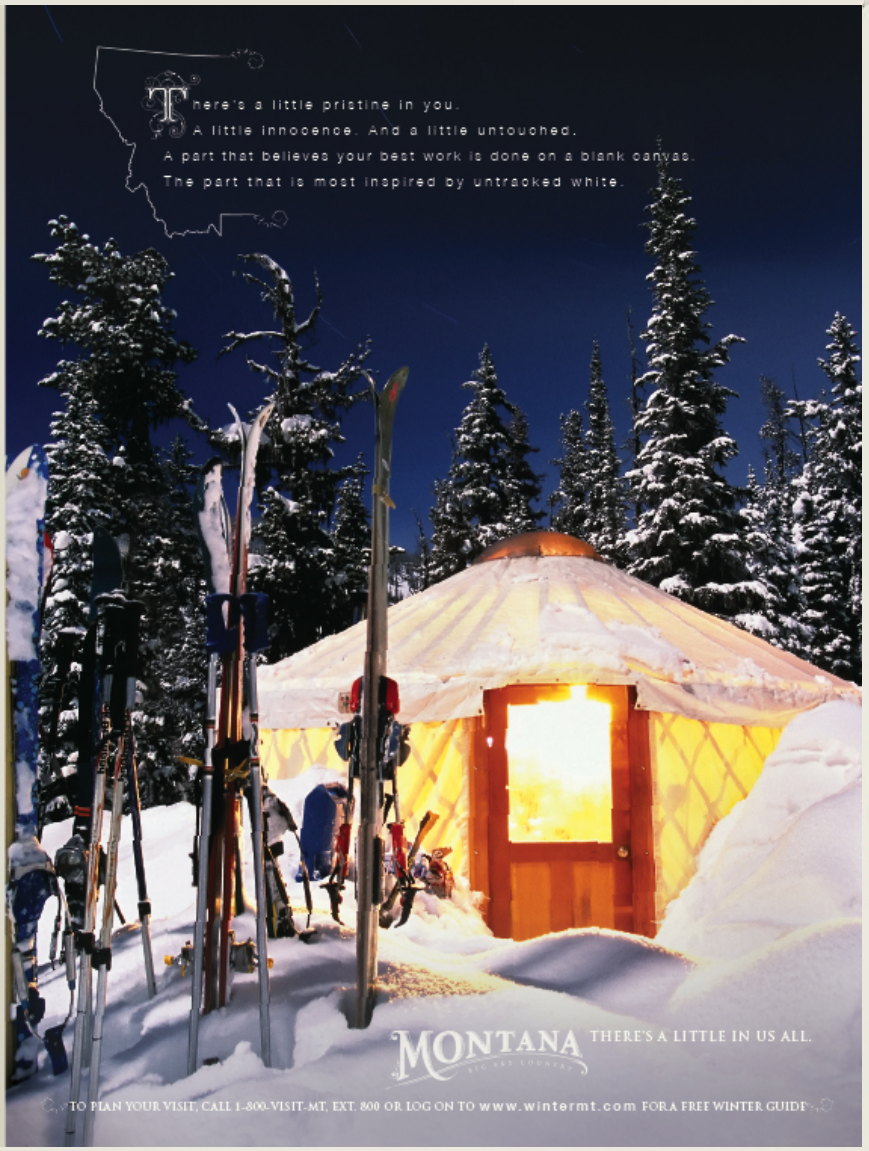
For those whose fondest memories are of the downhill variety, Montana provides a perfect reminder of why you fell in love with skiing in the first place. Tap into the uncomplicated, uncrowded essence of skiing and snowboarding at one of 16 areas across the Big Sky state. Montana offers it all, from big, bodacious mountain resorts offering deep snow, massive verticals, and boundless amenities, to down-home, family-run areas offering superb value and lots of soul. No matter what your ski area of choice may be, one constant across the treasure state is the plentitude of billowy cold-smoke powder.

## BOZEMAN, MONTANA: WATCH FOR THE BLUE LIGHT

Here's a tip for those fond of powder snow. When visiting the blossoming burg of Bozeman, keep an eye peeled for the telltale blue light mounted atop the historic Baxter Hotel. Locals – and visitors in the know – realize this sapphire beacon can only mean one thing...fresh snow has blanketed the Bridger Bowl Ski Area. And here in Montana, "freshies" come in that extra billowy variety that hangs in the air long after you've arced down the mountain.

## BIG SKY/MOONLIGHT INTERCONNECT: BIGGEST SKIING IN THE U.S.

Thanks to the newly offered Lone Peak Interconnect lift ticket option, skiers & snowboarders are free to explore more terrain than any other area in the U.S. at Big Sky Resort and adjacent Moonlight Basin. Together they offer over 5,500 acres of skiing and riding. More terrain means more options for all levels. In fact, there are many die-hard locals who will admit to having barely scratched the surface at this massive, European-style interconnect.




# Winter Print Co-op

MONTANA
BIG SKY COUNTRY

Montana Promotion Division · Department of Commerce

# Discover America (International Co-op)

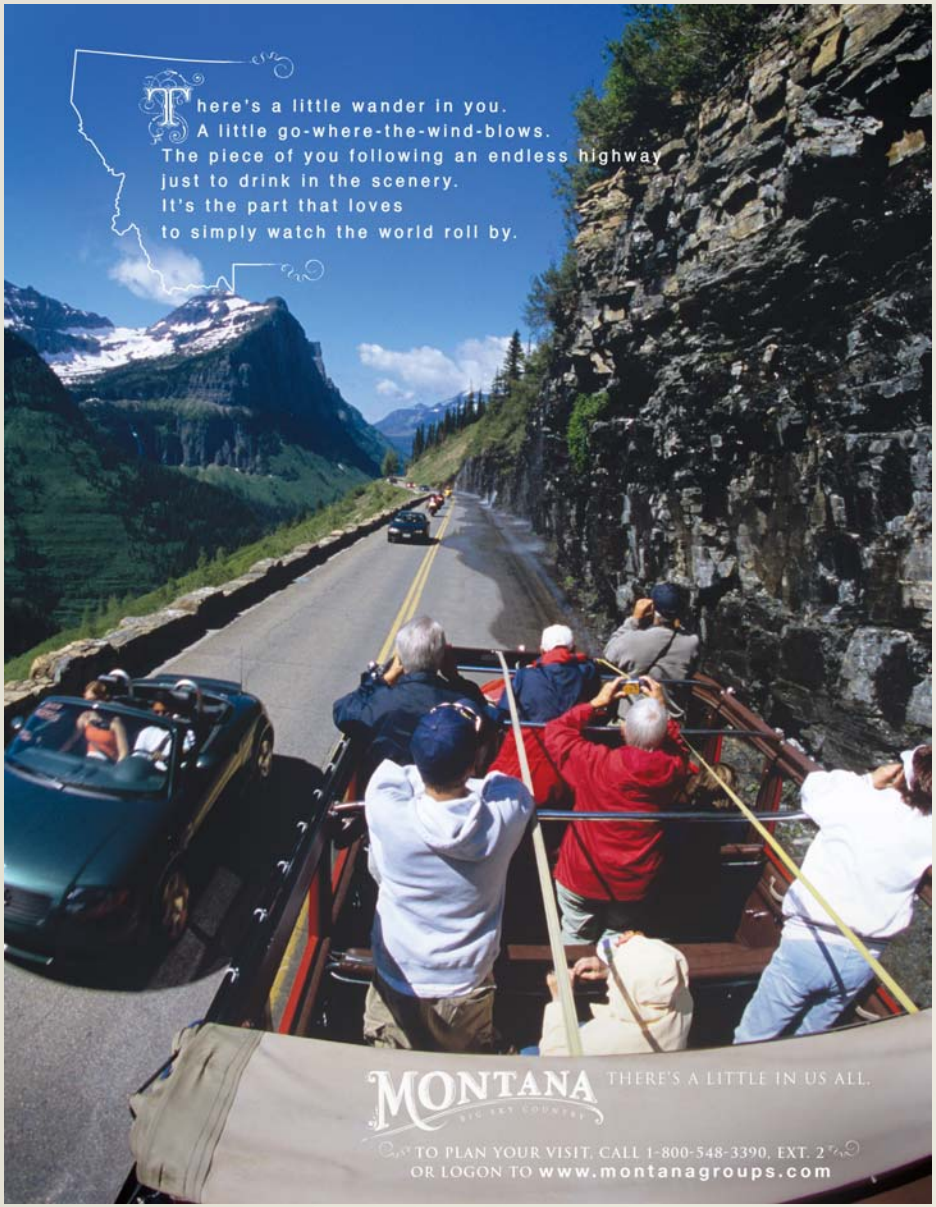
MONTANA
BIG SKY COUNTRY

Montana Promotion Division · Department of Commerce

# Meetings & Conventions

MONTANA
BIG SKY COUNTRY

Montana Promotion Division · Department of Commerce




# Group Tours

MONTANA
BIG SKY COUNTRY

Montana Promotion Division · Department of Commerce

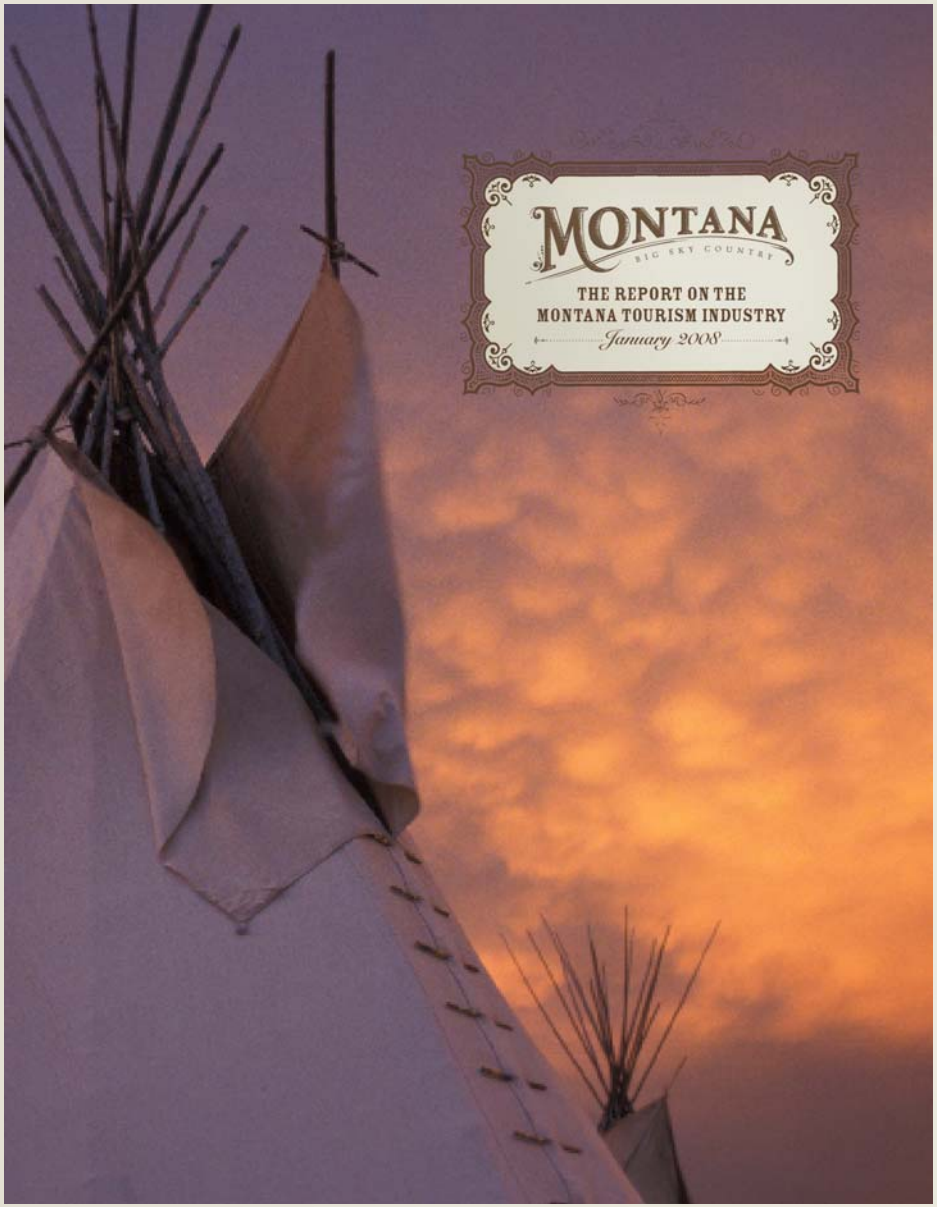
Back

# Vacation Planner Cover

Front

MONTANA BIG SKY COUNTRY

Montana Promotion Division · Department of Commerce




# Annual Report

MONTANA
BIG SKY COUNTRY

Montana Promotion Division · Department of Commerce

# Internet

# Internet

**Search Engines**
- Google, Yahoo!, iExplore

**Direct E-mail**
- YellowstonePark.com
- BudgetTravel.com
- YesMail

**Banner Ads**
- Travel websites
- Culture/history websites
- Outdoor enthusiast websites
- Active mature websites
- Family travel websites

# Internet

**Travel**

- Away Network
  - Includes away.com, gorp.com, gorptravel.com, outside.com
- TripAdvisor.com
- BudgetTravel.com
- Fodors.com
- TravelandLeisure.com

**Family Travel**

- FamilyTravelForum.com
- Away Network

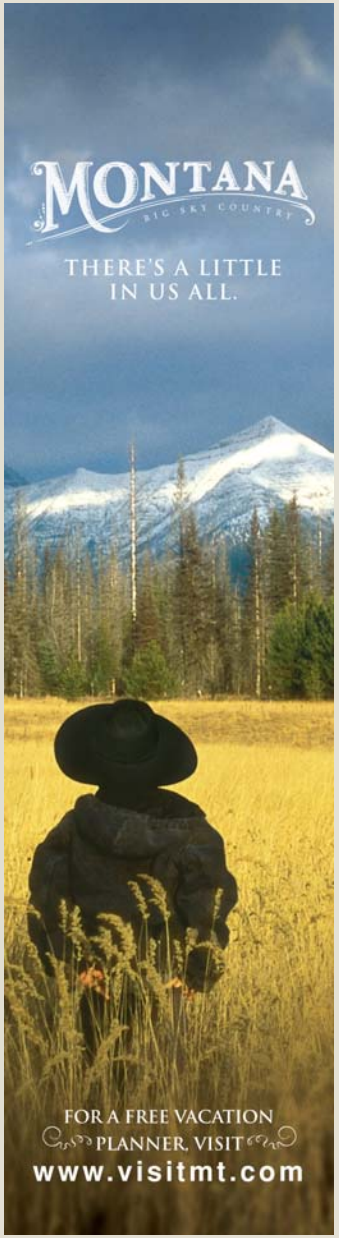
# Internet

**Culture/History**
- NationalGeographic.com
- Smithsonian.com

**Outdoor Enthusiast**
- Wildernet.com
- Away Network
- GordonsGuide.com

**Active Mature**
- AARP.org

# Banner Creative



# Internet

**Timing**

- March 08 through July 08
- Additional internet media buy likely

**Search Engines (Pay-per-Click Advertising)**

- Cost: $94,000.00
- Clicks: 87,500
- Cost-per-click: $1.07

**Content Websites (Pay-per-Impression Advertising)**

- Cost: $137,558.40
- Impressions: 6,978,350
- CPM: $20.23

# Internet

Total Budget: $231,558.40

Co-op contribution: $29,846.07 (13% of total)

# Web Development

# Web Development

- Website Enhancements
  - Rich media content development
  - Niche webpage sites
- E-mail Marketing Service

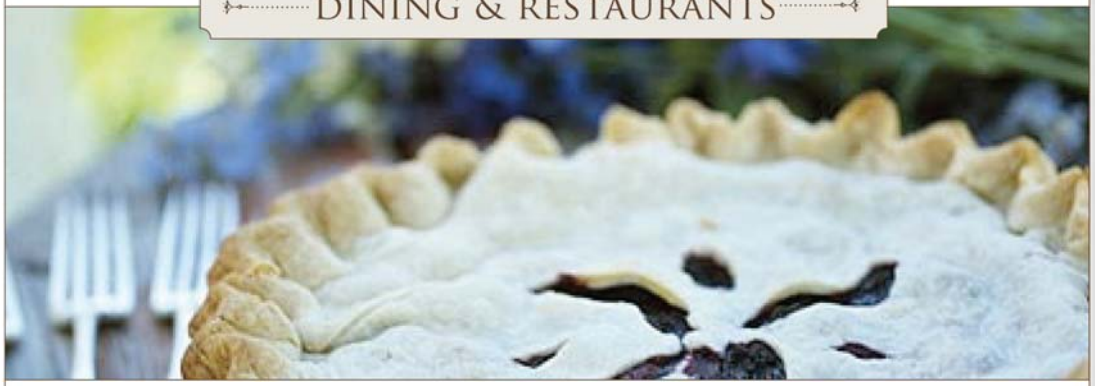
# Rich Media Development

- Audio podcasts
  - Register of Historic Places (Butte)
  - Ghost Town Walking Tour (Virginia City and/or Nevada City)
  - Pintler Scenic Driving Route
- Streaming video / vodcasts
  - Glacier National Park
  - "A Day in the Life"
  - Researching repurposing of "Backroads of Montana" footage
- Interactive maps & timelines
- Photo slide shows
- Downloadable PDFs

# Niche Website Sections

- Dining & Restaurants
- Rodeos
- Farmer's Markets & Ag Tours

# DINING & RESTAURANTS



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## CHICO HOT SPRINGS

*Pray, Montana*

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DINING & RESTAURANTS IN MONTANA

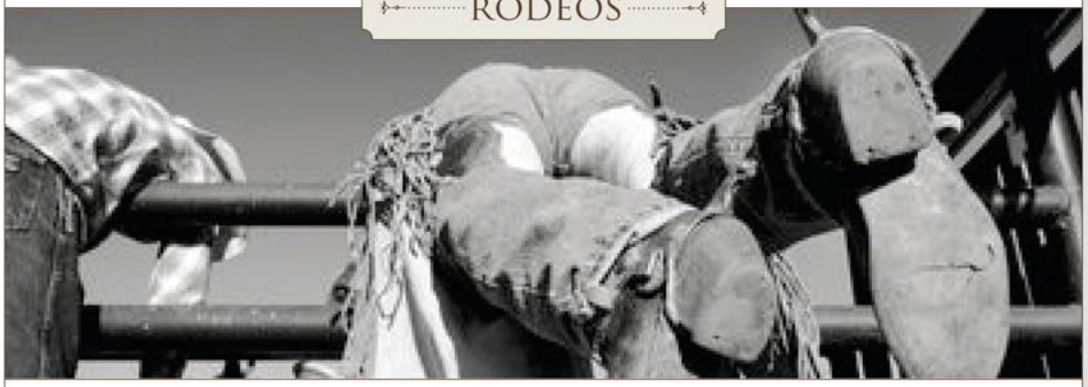
FARM TO TABLE | MONTANA'S CULINARY UNDERBELLY

MONTANA BIG SKY COUNTRY THERE'S A LITTLE IN US ALL

PLACES TO STAY | PLAN A VACATION | EXPLORE MONTANA | EVENTS CALENDAR | THINGS TO DO | WEATHER & ROADS | WATCHABLE WILDLIFE | mt.gov

Official State Travel Information Site

# RODEOS



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## BUCKING HORSE SALE

*Miles City, Montana*

## MONTANA RODEOS

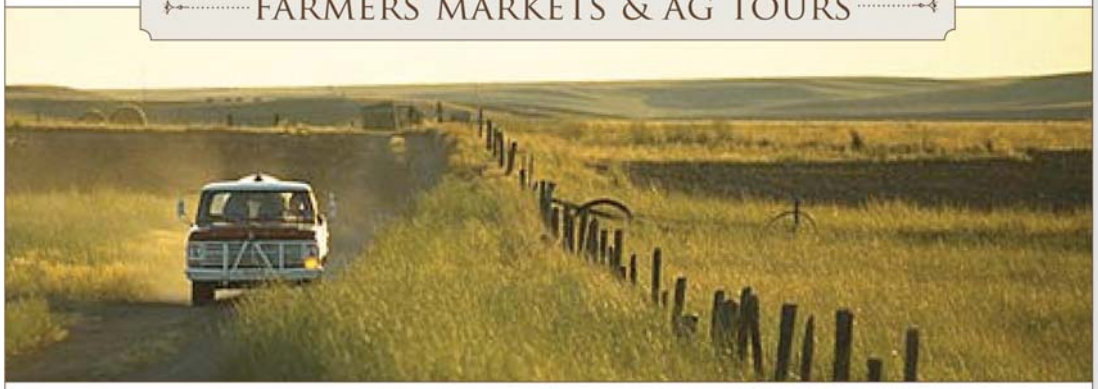
DAY IN THE LIFE | IN THE KNOW (AS IT PERTAINS TO RODEO)

MONTANA BIG SKY COUNTRY THERE'S A LITTLE IN US ALL

PLACES TO STAY | PLAN A VACATION | EXPLORE MONTANA | EVENTS CALENDAR | THINGS TO DO | WEATHER & ROADS | WATCHABLE WILDLIFE | mt.gov

Official State Travel Information Site

# FARMERS MARKETS & AG TOURS



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## ROCKY CREEK FARMS

*Bozeman, Montana*

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MONTANA FARMERS MARKETS & AG TOURS

MT FARMING & RANCHING | AG TOURS

# Montana
# Cast & Camp Campaign

## 2008 Key Market Campaign

# Montana Cast & Camp Campaign

- Nationwide promotion with Orvis
- In-store presence in 40 company-owned stores
- Media campaigns in 3 key markets (Chicago, Atlanta, & Dallas)
- Timing: May-July 2008
- Budget: $1,500,000
- The Hook: win a luxury camp & fish vacation to Montana.

ENTER TO WIN A *free* TRIP TO MONTANA.

The trip includes a 5 day/4 night all expense paid fly fishing trip for you and 3 guests to North Fork Crossing Lodge. You'll be set up for success before you hit the rivers with your own fly fishing gear from Orvis®. Then, experience 3 days of guided fly fishing with PRO Outfitters on some of the best and least-crowded trout water in Montana. After each day on the serene water, enjoy a delicious gourmet meal and recount your fishing stories with friends around a campfire. We won't mind if you exaggerate a little.

*TRIP INCLUDES AIRFARE, GROUND TRANSPORTATION, LODGING, MEALS AND THREE DAYS OF GUIDED FLY FISHING.

MONTANA BIG SKY COUNTRY VISITMT.COM | ORVIS ORVIS.COM

# Montana Cast & Camp National Exposure

- Posters & entry boxes in-store promoting "Montana Cast & Camp Luxury Vacation Sweepstakes"
  - Tie-in with Orvis summer travel sale promo
  - Generate leads for future marketing
  - Generate interest & awareness
- Bag stuffers in customer bags
- Direct email blasts to Orvis consumer email database
- Direct email blasts to Travel Montana consumer email database
- Web banners on www.orvis.com
- Blow-in cards in targeted Orvis catalogs
- Sweepstakes featured in 8-page full-color newspaper insert distributed in Chicago, Seattle, Minneapolis-St. Paul, and other markets in MN, ND & Canada

# Montana Cast & Camp
# Key Market Media Campaign

- More concentrated efforts in Chicago, Atlanta & Dallas:
  - Radio Campaign
  - Print Campaign
  - In-store "Montana Experience" events w/ Montana food, fly-tying demos & musicians
  - Out-of-Home Media
    - Dry cleaning bags
    - Trains (Chicago only)
    - Viral Marketing/Street Teams
- Call-to-action: website only (no 800#; limited RS)

# Montana Cast & Camp Website

## www.visitmt.com/orvis

- Live May 1st
- After sweepstakes ends (June 29), website will redirect to www.visitmt.com/fishing

# Montana Cast & Camp Website

THE PRIZE

The trip includes a 5 day/4 night all expense paid fly fishing trip for you and 3 guests to North Fork Crossing Lodge. You'll be set up for success before you hit the rivers with your own fly fishing gear from Orvis®.
Then, experience 3 days of guided fly fishing with PRO Outfitters on some of the best and least-crowded trout water in Montana. After each day on the serene water, enjoy a delicious gourmet meal and recount your fishing stories with friends around a campfire. We won't mind if you exaggerate a little.

PRO OUTFITTERS MONTANA
PROOUTFITTERS.COM

*TRIP INCLUDES AIRFARE, GROUND TRANSPORTATION, LODGING, MEALS AND THREE DAYS OF GUIDED FLY FISHING.

THE PRIZE | OFFICIAL RULES | ENTER CONTEST

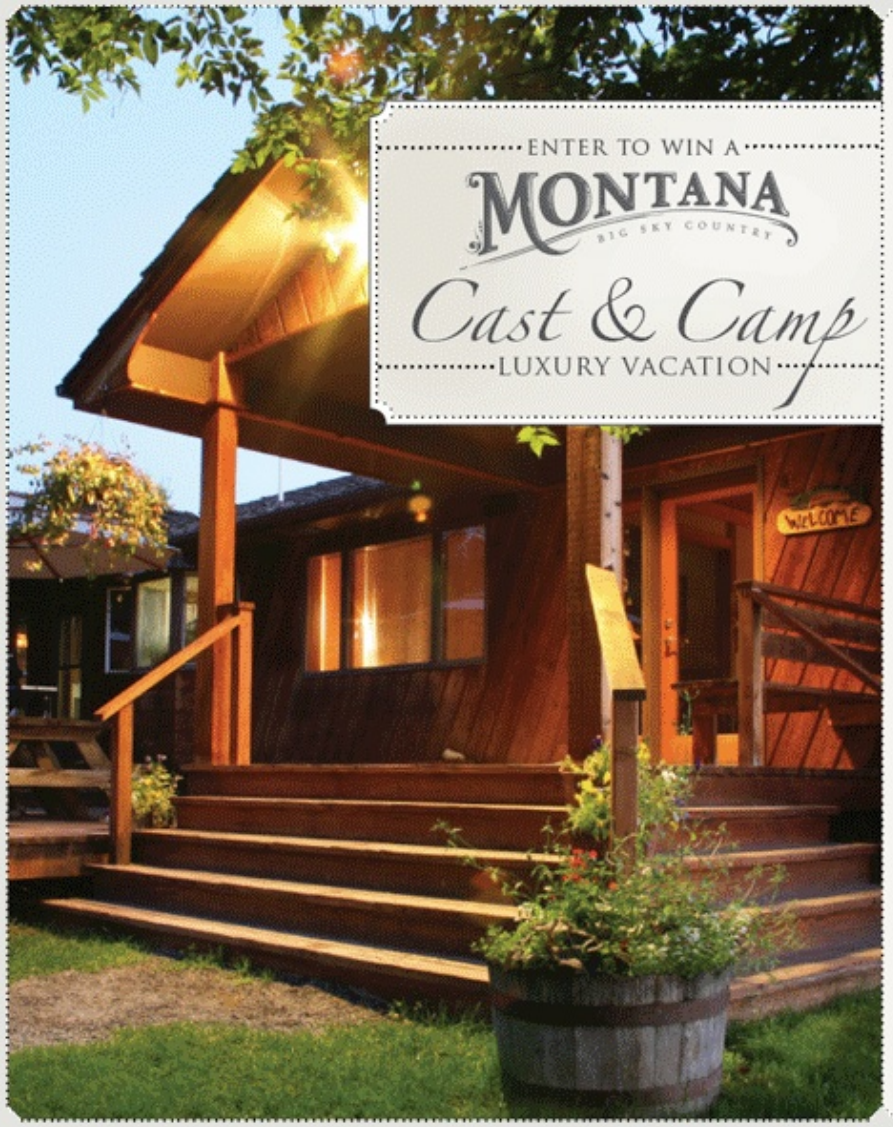
PLAN YOUR TRIP TO MONTANA | CONTACT US

VISIT A MONTANA ORVIS® ROADSHOW

BROUGHT TO YOU BY:

MONTANA VISITMT.COM | ORVIS ORVIS.COM

# Montana Cast & Camp Website




CONTACT US

Travel Montana/Montana Promotion Division,
Department of Commerce, State of Montana

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**MAILING ADDRESS**
Montana Promotion Division
PO Box 200533 Helena MT 59620-0501

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mt-webmaster@visitmt.com

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PLAN YOUR TRIP TO MONTANA | CONTACT US

VISIT A MONTANA ORVIS® ROADSHOW

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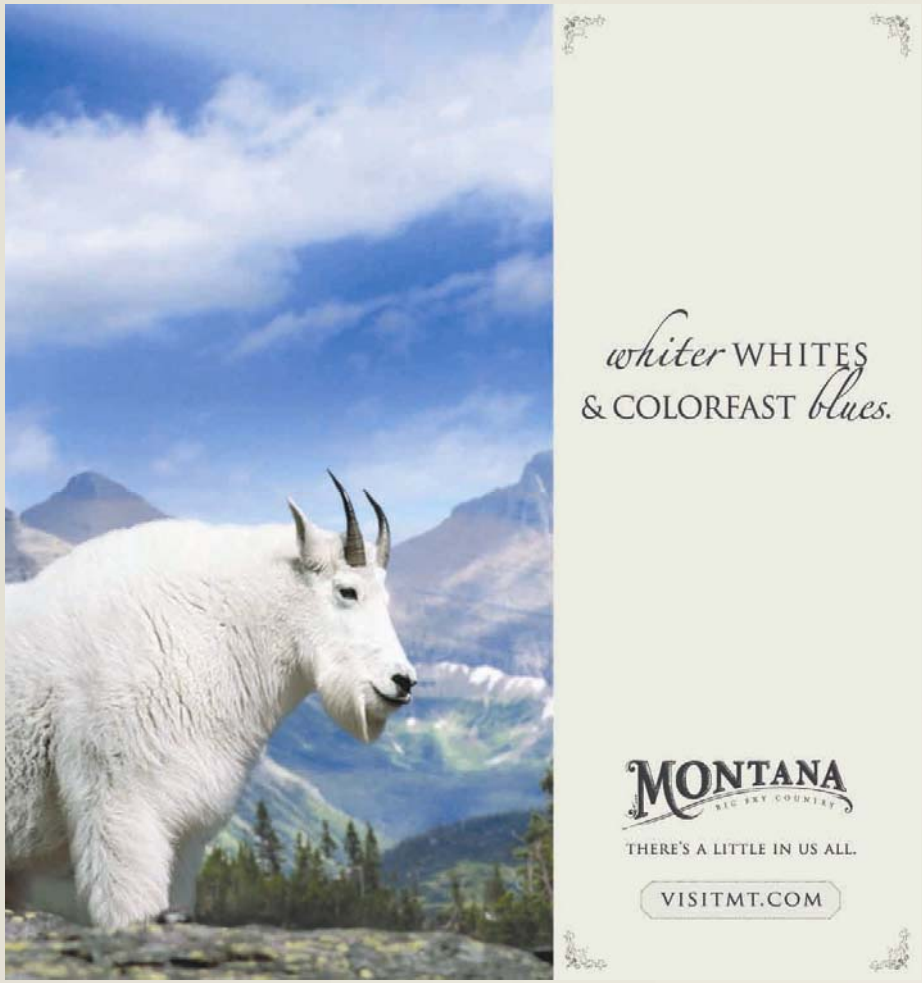
MONTANA VISITMT.COM | ORVIS ORVIS.COM

# Montana Cast & Camp Dry Cleaning Bags



# Montana Cast & Camp Dry Cleaning Bags

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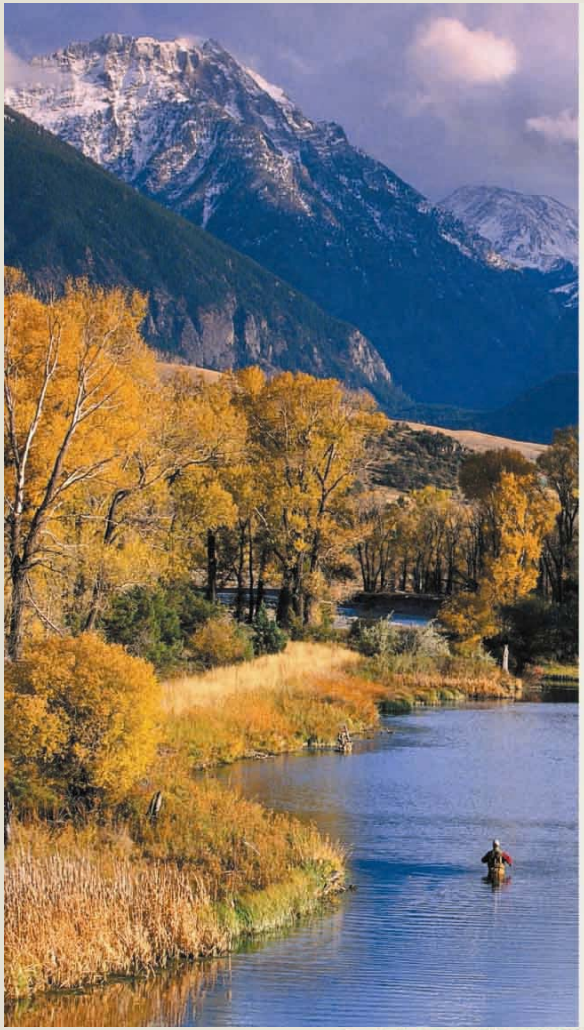


MAKE YOUR CLOTHES *earn* THEIR NEXT DRY CLEANING.

MONTANA
BIG SKY COUNTRY

THERE'S A LITTLE IN US ALL.

VISITMT.COM

# Montana Cast & Camp Train Wrap (Chicago)

# 3 Parks Campaign

# 3 Parks Co-op

Campaign to promote region's three national parks:

- Glacier NP
- Grand Teton NP
- Yellowstone NP

Contributing partners include:

- Travel Montana
- Wyoming Travel & Tourism
- Grand Teton Lodging Co.
  - lodging concessionaire for GTNP
- Xanterra
  - lodging concessionaire for YNP
- Glacier Park, Inc.
  - lodging concessionaire for GNP

# 3 Parks
## continuing 2007 Strategy

Target Market

- Adults traveling without children, ages 45-64
  - formerly families, targeting parents ages 35-54

Campaign Timing

- Building travel in the fall shoulder season
  - formerly focused on summer trips
- Campaign advertising will run June-August
  - formerly ran March-May

# 3 Parks

- New Creative
  - Magazine
  - Fulfillment piece
  - Web banners & 3parks.com website
- Co-op Budget = $190,000
  - Magazine media buy & production: $155,000
  - Fulfillment piece/production: $10,000
  - Web buy & development: approx. $25,000

# International Marketing

# International Marketing

- Over 2% of Montana's Visitors are from Overseas.
- Weak U.S. dollar will influence more travel to U.S.
- Canadian visitation particularly strong.

# International Marketing

- Montana markets to Europe with the states of Idaho, South Dakota and Wyoming with a company called Rocky Mountain International (RMI) based in Cheyenne, WY.
- RMI coordinates the marketing activities and has established offices in our key markets of Germany, the United Kingdom, Belgium, France, the Netherlands and Italy.
  - New markets include Scandinavia and Australia.
- In the Pacific Rim, Travel Montana works with the Dept. of Commerce Trade Offices in Taipei, Taiwan and Kumamoto, Japan on tourism marketing related projects.

# Group Travel

# Group Travel

A full loaded motorcoach contributes $5,000 to $7,500 per day to the local economy.

# Group Travel

The average daily expenditure per person traveling with a group is $192 as opposed to an independent traveler who spends $187.
(NTA packaged travel study 2000)

- The program conducts FAM tours for group tour operators.
- Staff attend three national conventions to promote Montana as a destination.
  - NTA, National Tour Association
  - ABA, American Bus Association
  - BankTravel
- Advertise in Trade Publications.
- Produce *Group Tour Planning Guide*.
- www.montanagroups.com
- Provide itinerary counseling to operators.

# Meetings and Conventions

# Meetings & Conventions

- Trade Show Assistance Program to Regions and CVBs.
- Print co-op advertising in:
  - Small Market Meetings
  - Association News
  - Smart Meetings
- Electronic co-op advertising in:
  - Association News
  - Meetings Focus
  - Smart Meetings
- Attend Destination Marketing Association International Annual Convention (DMAI)
- www.montanameetings.com

# Publicity

NATIONAL GEOGRAPHIC

WILDBIRD

ForbesLife

SkyWest

# Publicity efforts

- Media database/Press list
  - 1450 journalists
- Media Calendar
- Press Trips
- Press Room
  - www.pressroom.visitmt.com
- Email Blasts
- Trade Shows
  - SATW, NASJA, PowWow

# Publicity efforts

- Publicity Value
  - $18,000,000 in publicity values has been calculated to-date* in FY08.
  - Approximately 2/3 of this is a result of Travel Montana's publicity program.

*(Apr 08)

# Travel Montana Publications

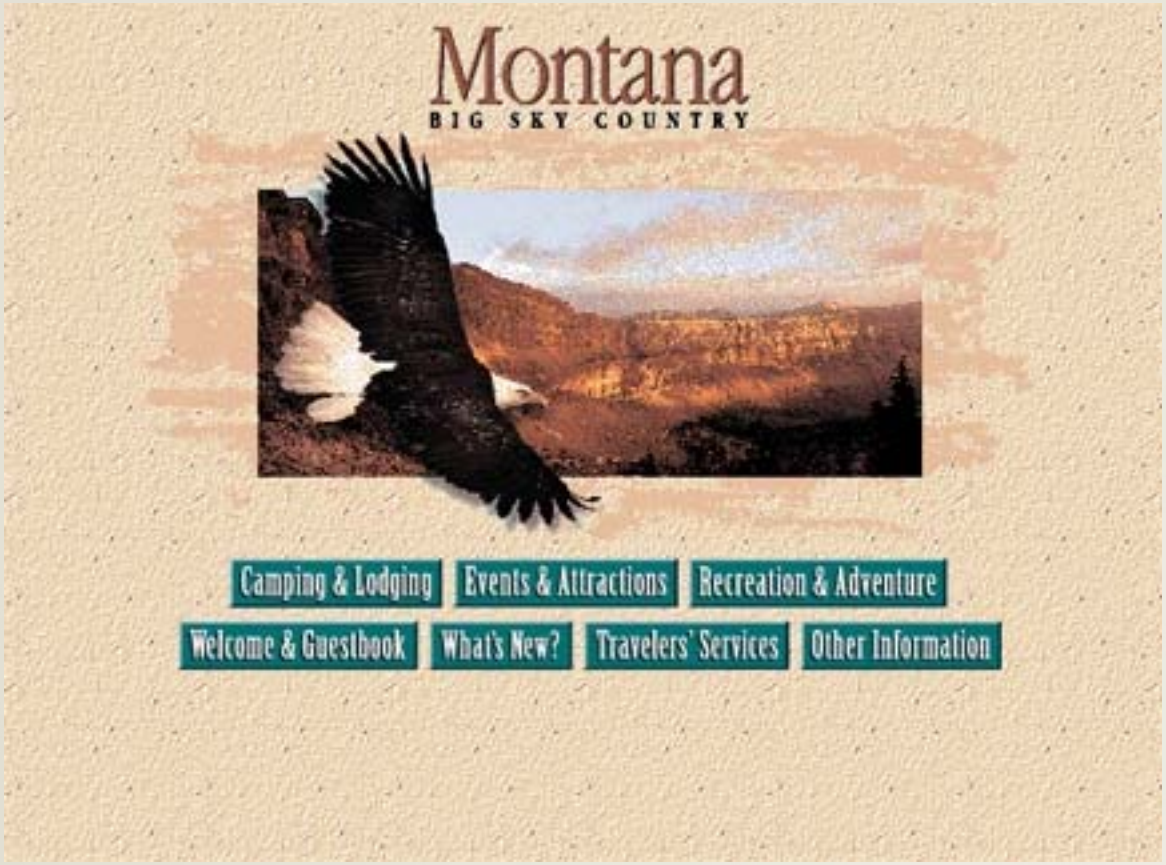
# Travel Montana Publications

# Publications

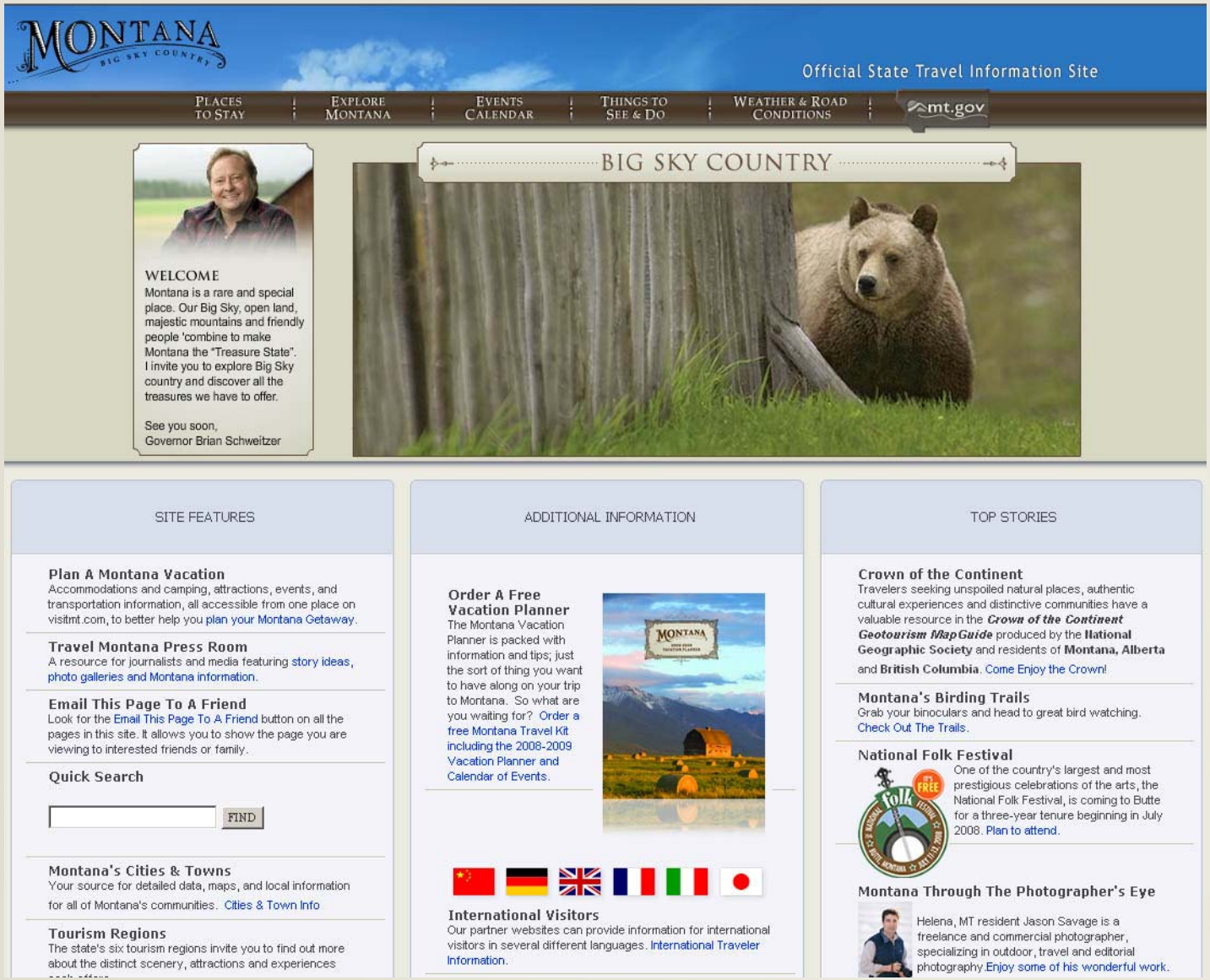
- Produces 1.6 million pieces of literature per year.
  - Guides, Planners, Brochures, Maps

- Offers Montana businesses affordable advertising opportunities to reach the travel market.

# Electronic Marketing




# First Travel Montana Website 1994

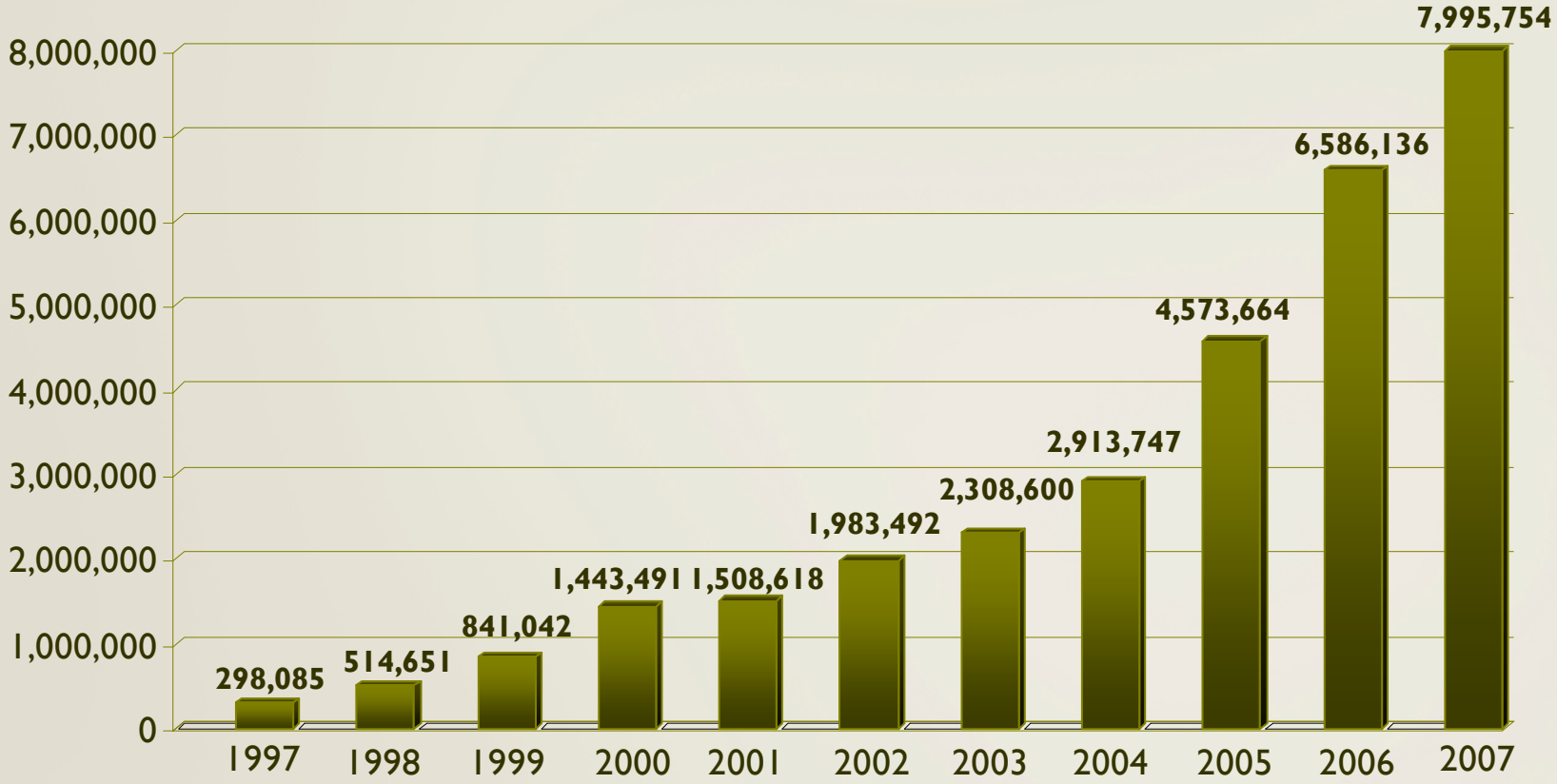



# Travel Montana Website 2008

MONTANA BIG SKY COUNTRY

MONTANA PROMOTION DIVISION · DEPARTMENT OF COMMERCE

# VISITMT.COM
# Growth from 1997-2007



# Travel Montana Websites *(30)*

**Sponsored**

- visitmt.com
- lewisandclark.state.mt.us
- wintermt.com/skimt.com
- montanakids.com
- montanameetings.com
- montanafilm.com
- indiannations.visitmt.com
- travelmontana.org (Intranet)
- montanagroups.com
- wildlife.visitmt.com
- montanainfo.org
- Co-op Sites: (sledtherockies.org, fourparks.com, nwlewisclark.com)

**Hosted**

- billingscvb.visitmt.com
- missoulameetings.visitmt.com
- yellowstone.visitmt.com
- russell.visitmt.com
- circle.visitmt.com
- bozemancvb.visitmt.com
- missouririver.visitmt.com
- glacier.visitmt.com
- goldwest.visitmt.com
- custer.visitmt.com
- greatfallscvb.visitmt.com
- helenacvb.visitmt.com
- westyellowstone.visitmt.com
- bigsky.visitmt.com
- mtdinotrail.org
- nemontanabirdingtrail.org

# Customer Contact Center

# Customer Contact Center

- Contracted with MARS Stout in Missoula
- Respond to over 200,000 requests for information per year
- Ability to respond to requests via phone, email, database letters, web chat
- VISITS software is integrated with our website database

# Travel Montana's Tourism Development & Education Program

# Travel Montana's Tourism Development & Education Program

- Grants
- Technical Assistance
- Partnerships
- Education

# Tourism Development & Education Projects

- Cultural & Heritage Tourism Projects:
  - MT Dinosaur Trail
  - Hands of Harvest: The Craft & Heritage Trails of NC MT
  - Of Sage & Stone Heritage Trails of SW MT

- Montana Tribal Tourism Alliance Projects and Operations Support

- Montana Governor's Conference on Tourism & Recreation (March 30-31, 2009, Helena)

- Montana Superhost Program

# Travel Montana's Tourism-related Grants

- Tourism Infrastructure Investment Program (TIIP) -- $300,000 Grant Pool (2008)

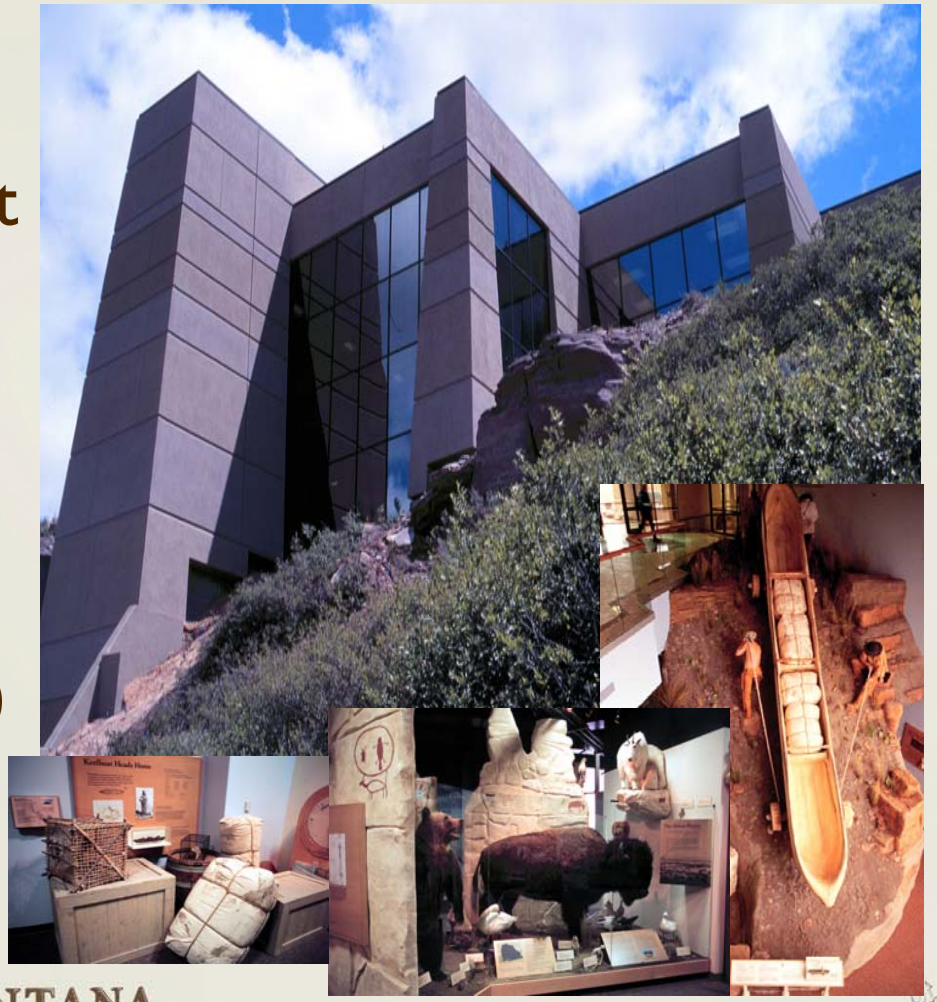
- Special Event Grant Program (SEGP) -- $61,500 Grant Pool (2008)

# Tourism Infrastructure Investment Program (TIIP) Results 1995-2007

- 63 "Brick & Mortar" Projects
- 43 Montana Communities
- $2.75 million tourism "bed tax" invested
- > $33 million in tourism projects assisted

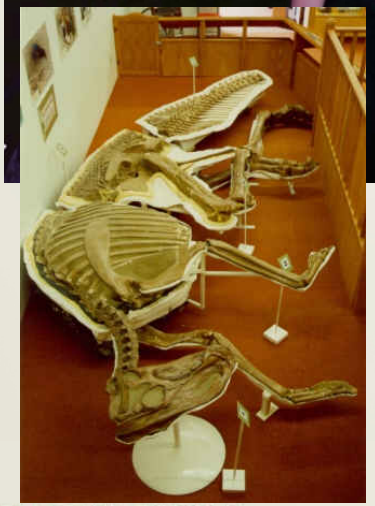
# TIIP Elements

- "Brick & Mortar" Project
- IRS Recognized Non-Profit Sponsor
- Minimum Grant: $20,000
- Hard Match: $1 match/$2 Grant
- Minimum Project: $30,000
- Maximum Grant: Grant Pool Amount



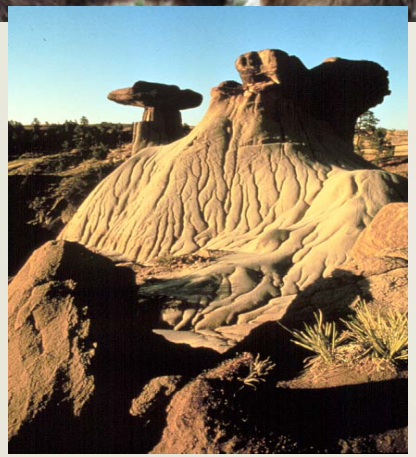
# TIIP: The Basic Questions

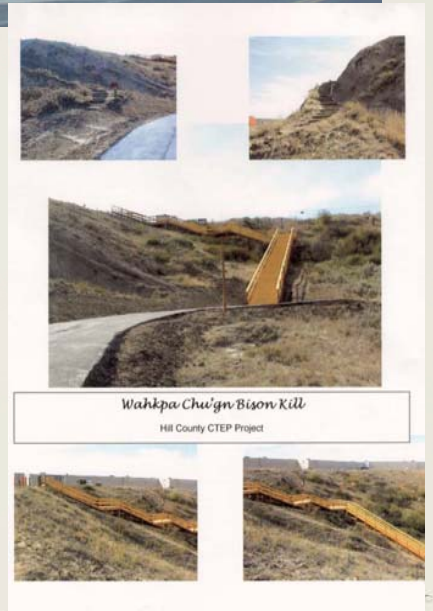
- Strengthen MT as a Visitor Attraction?
- Keep Current Visitors Longer?
- Help Visitors Spend More $?
- Without TIIP $, Will Historical/Cultural Treasure Be Lost?



# TIIP: Priorities

- High Priority:
  - Historical & Cultural Preservation & Interpretation
  - Build on Community/Region's Unique Strength
  - Completing Projects
- Low Priority:
  - Start Up $
  - VICs and stand-alone restrooms





# Special Event Grant Program 2002-2008

- Community economic development through new annual, on-going events

- Cultural and heritage events, sporting events and attendance events

- To Date: $412,500 for 59 events

# SEGP Eligibility

- Non-profit sponsor, city, county, tribe (federal & state agency NOT eligible)

- New annual event or less than 3 years old

- Event focused on attracting visitors from outside a 100-mile radius

- Match Funds: at least 50% "hard" match, match ratios vary depending on economic status of county

# SEGP Uses

- Eligible Uses:

*Marketing *Equipment Rental
*Insurance *Performer Fees
*Event Security *Mailings
*Promotional Materials

- Ineligible Uses:

*Construction *Payroll
*Prize Money *Alcohol
*Reunions
*County Fairs *Cash Subsidies
*Conventions

# Travel Montana's Tourism Technical Assistance

# Technical Assistance

- Tourism Research: Travel Montana, ITRR-UM, other sources
- Tourism-related Technical & Financial Resources: state, federal, private
- No & Low Cost Marketing Services: Travel Montana, AAA Montana, Tourism Regions, CVBs

# Montana Visitor Information Systems (VIS)

# Visitor Information Centers (VICs)

## 9 Gateway Communities

* Dillon
* Broadus
* Wibaux
* St Regis
* Shelby
* West Yellowstone

Culbertson
* Hardin
Lolo Pass

*Made in Montana Product Display Cases*

# Montana VIC Display Case Program

Partnership with Made / Grown in Montana programs

- Marketing opportunity for registered manufacturers, producers and entrepreneurs
- Registered products and manufacturers are able to showcase goods to over 200,000 nonresident travelers per season (May thru Sept)
- Partnership strengthens Montana's economy by promoting locally grown and made products

# Montana VIC Fast Facts

Of the nonresident visitors who visited Montana during the 2nd and 3rd quarters of 2006 (April through June and July through September), nearly 30% of them (2.2 million) used visitor information center staff as a source of information "some" or "a lot."

- These visitors spent an average of $178.65 per group per day ($150.96 for All Visitors)
- These visitors spent an average of 6.26 nights in Montana (4.79 for All Visitors)
- This resulted in an average per group expenditure of $1,118.35 per trip ($723.10 for All Visitors)
- This translates into approximately $973 million spent by these visitors during quarters 2 and 3.

# Brochure Distribution

Travel Montana Travel Planner distributed at 555 sites statewide.

# Montana Film Office

# Montana Film Office – General Information

- Created in 1974 as central information source for on-location filmmakers
- Part of Montana Promotion Division of the Montana Dept. of Commerce
- Funded entirely by the 4% lodging facility use tax
- Ensures that Montana is "film friendly"

# Montana Film Office – What We Do

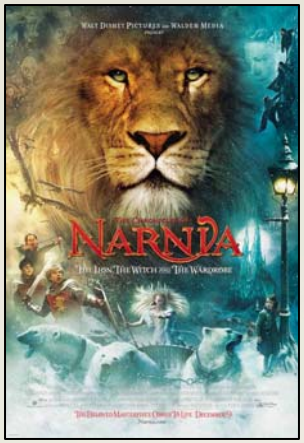
- Primary role is to bring Productions to Montana for the Economic Benefit of the State
- Produces the Montana Production Guide with Listings of 275 Montana Crew Members and over 700 Montana Businesses
- Maintains montanafilm.com as a Marketing and Fulfillment tool
- Administers Montana's film production incentive, the "Big Sky on the Big Screen Act"
- Provide service to Production Companies that are interested in filming in Montana
  - Find locations that fit scripts
  - Act as liaison throughout production and cut red tape
  - Host Scouting trips for producers

# Direct Economic Benefits of Film Production –Why We Do It

- Money spent on wages, products, services
- Brings in "new" money that would otherwise be spent in Canada or another state
- Total economic impact is 1.5 times the direct expenditures by the production company
- Productions help create & retain jobs for Montana workers and graduates of Montana's University's film programs
- Comparable to a medium size business generating revenue in months, not years. With no need for additional infrastructure such as schools and public services
- 7.0 Million Dollars of Direct Economic Impact in 2006

# Partial List of Movies Filmed in Montana

- Glacier Country
  1. Pretty Ugly People (2007)
  2. The Chronicles of Narnia: The Lion, The Witch and The Wardrobe (2005)
  3. Devil's Pond (2003)
  4. Hidalgo (2004)
  5. Frozen in Fear (2001)
  6. Big Eden (2000)
  7. What Dreams May Come (1998)
  8. Under Siege 2: Dark Territory (1995)
  9. Beethoven's 2nd (1993)
  10. Forrest Gump (1994)
  11. The River Wild (1994)
  12. Always (1989)
  13. Disorganized Crime (1989)
  14. Continental Divide (1981)
  15. The Shining (1980)
  16. Damnation Alley (1977)




17. Winds of Autumn (1976)
18. Winterhawk (1975)
19. All the Young Men (1960)
20. Timberjack (1955)
21. Dangerous Mission (1954)
22. Cattle Queen of Montana (1954)
23. Powder River (1953)
24. Red Skies of Montana (1952)
25. The Big Trail (1931)

# Partial List of Movies Filmed in Montana

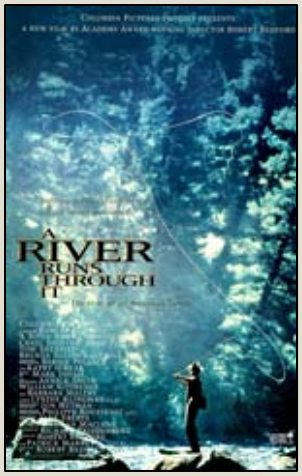
- Gold West Country
  26. Love Comes to the Executioner (2006)
  27. Don't Come Knocking (2005)
  28. The Patriot (1997)
  29. Return to Lonesome Dove (1993)
  30. The Last Ride (1994)
  31. Diggstown (1992)
  32. Thousand Pieces of Gold (1991)
  33. Amazing Grace and Chuck (1987)
  34. Runaway Train (1985)
  35. Fast-Walking (1982)
  36. Heaven's Gate (1980)
  37. Greyeagle (1977)
  38. Evel Knievel (1971)
  39. Little Big Man (1970)

- Russell Country
  40. Three Priests (2007)
  41. The Slaughter Rule (2000)
  42. Broken Arrow (1996)
  43. Holy Matrimony (1994)
  44. War Party (1988)
  45. The Untouchables (1987)
  46. The Stone Boy (1984)
  47. Heartland (1979)
  48. Telefon (1977)

- Missouri River Country
  49. Northfork (2003)
  50. Firefox (1982)

# Partial List of Movies Filmed in Montana

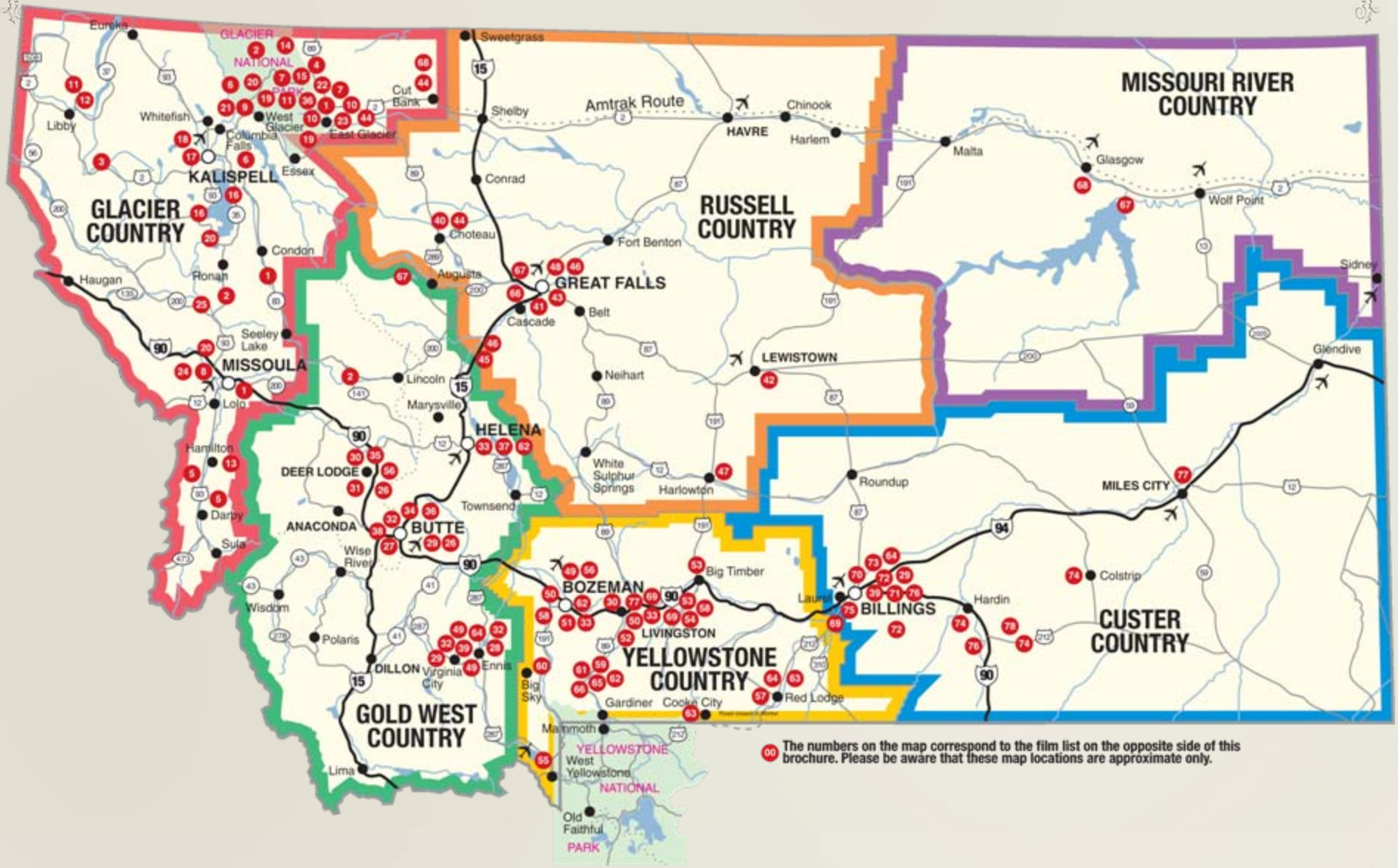
- Yellowstone Country




51. Taking Chance (2008)
52. A Plumm Summer (2007)
53. Wolfsummer (2003)
54. The Hi-Line (1999)
55. The Horse Whisperer (1998)
56. Everything That Rises (1998)
57. Iron Will (1994)
58. The Last Ride (1994)
59. The Ballad of Little Jo (1993)
60. A River Runs Through It (1992)
61. Keep the Change (1992)
62. True Colors (1991)
63. Cold Feet (1989)
64. Amazing Grace and Chuck (1987)
65. Triumphs of a Man Called Horse (1982)
66. Missouri Breaks (1976)
67. Rancho Deluxe (1975).
68. Thunderbolt and Lightfoot (1974)

- Custer Country

69. A Fork in the Road (2008).
70. Josh and S.A.M. (1992
71. Far and Away (1992)
72. Son of the Morning Star (1991)
73. Bright Angel (1991
74. Pow Wow Highway (1989)
75. Stacking (1987)
76. Warpath (1951)
77. Danger Lights (1930)
78. The Devil Horse (1926)

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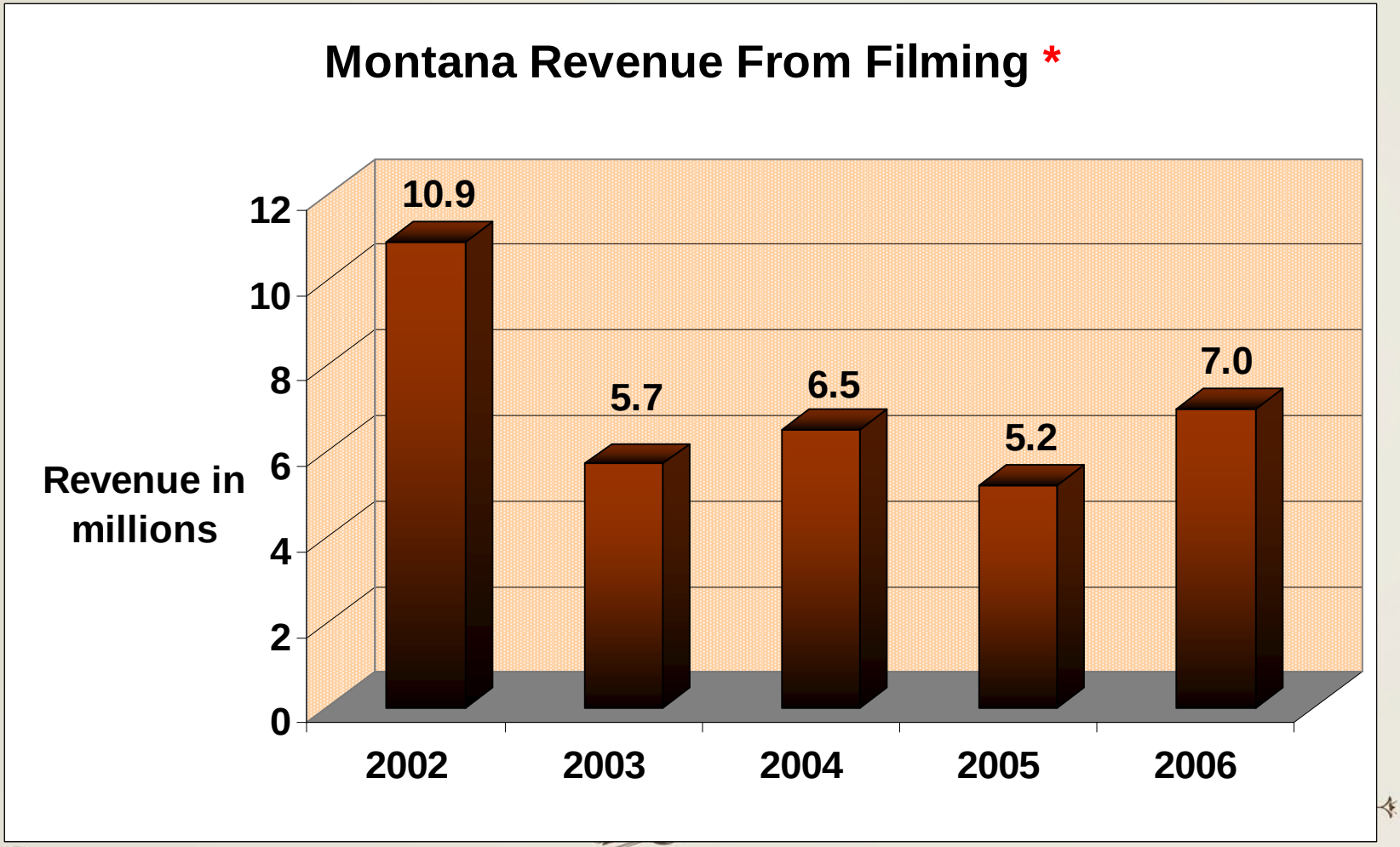
Montana Promotion Division · Department of Commerce

# 2002-2006 Revenue Chart



# How We Promote Filming in Montana

- The Big Sky on the Big Screen Act (incentive)
- Advertising
- Trade Shows
- Film Festivals (Sundance, AFI Fest, Hatch, etc.)
- www.montanafilm.com
- The Montana Production Guide
- Promotional Items

# The Big Sky on the Big Screen

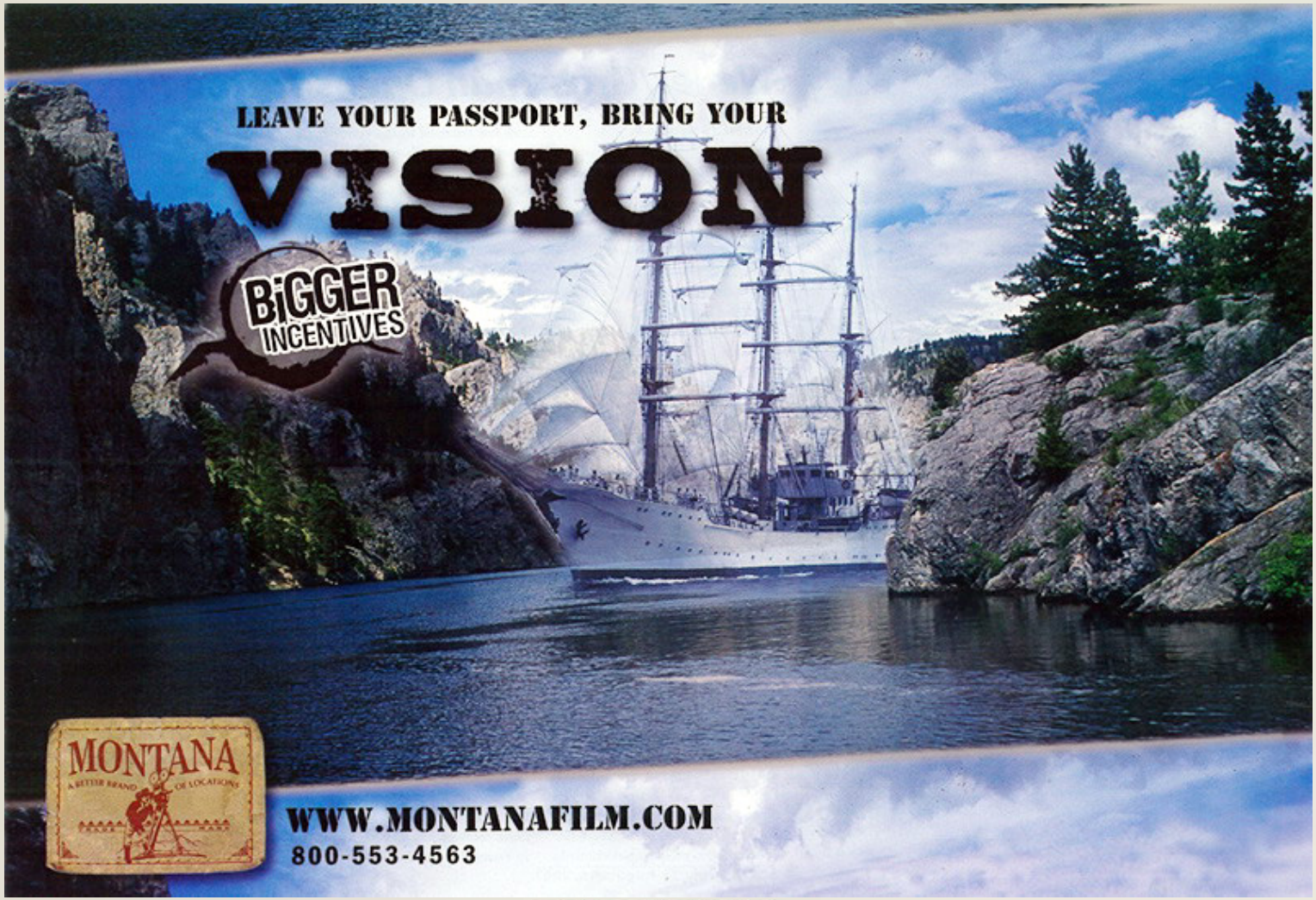
- **14%**

  Fourteen percent refundable tax credit based on company expenditures on Montana labor and actors hired by the production company

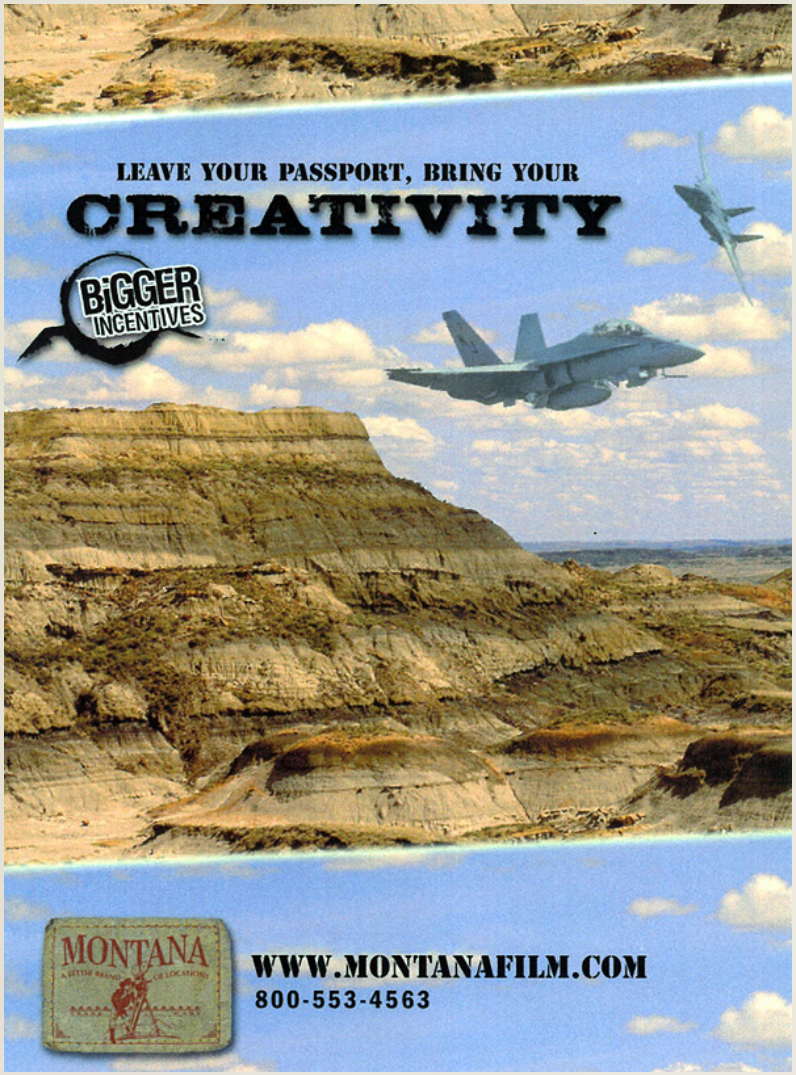
- **9%**

  Nine Percent refundable tax credit based upon qualified production expenditures purchased in Montana - includes hotel/motel expenditures

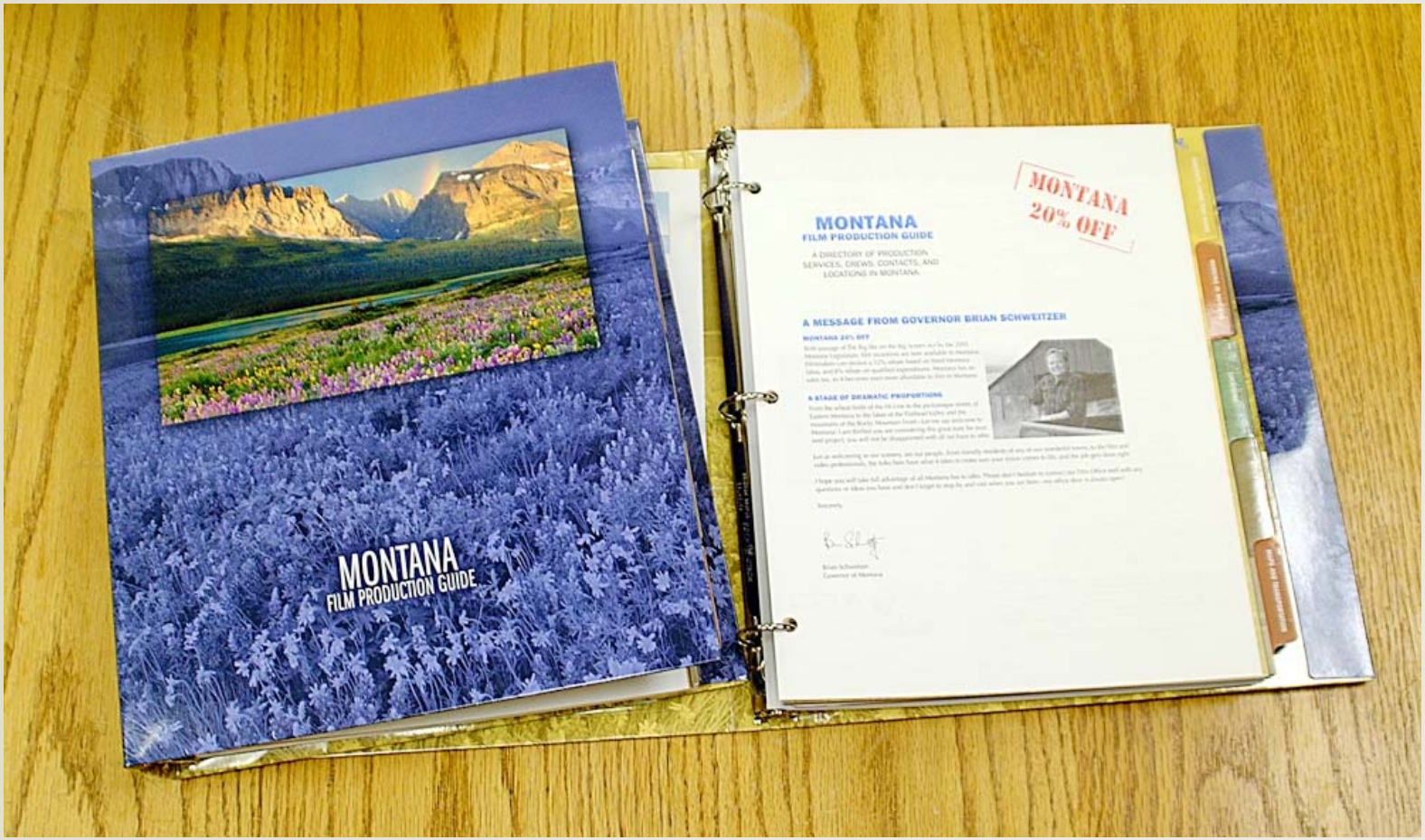
# Film Office Ad Campaign



# Film Office Ad Campaign



# Montana Production Guide



# the Crown of the Continent MapGuide

# Geotourism in the Crown of the Continent

Waterton-Glacier International Peace Park

# Mapping Character of Place

# Geotourism

Tourism that sustains or enhances the geographical character

of a place—

its environment,

heritage,

aesthetics,

culture,

the well-being

of its residents.

# MapGuide projects are a catalyst

**Engage diverse local communities to:**

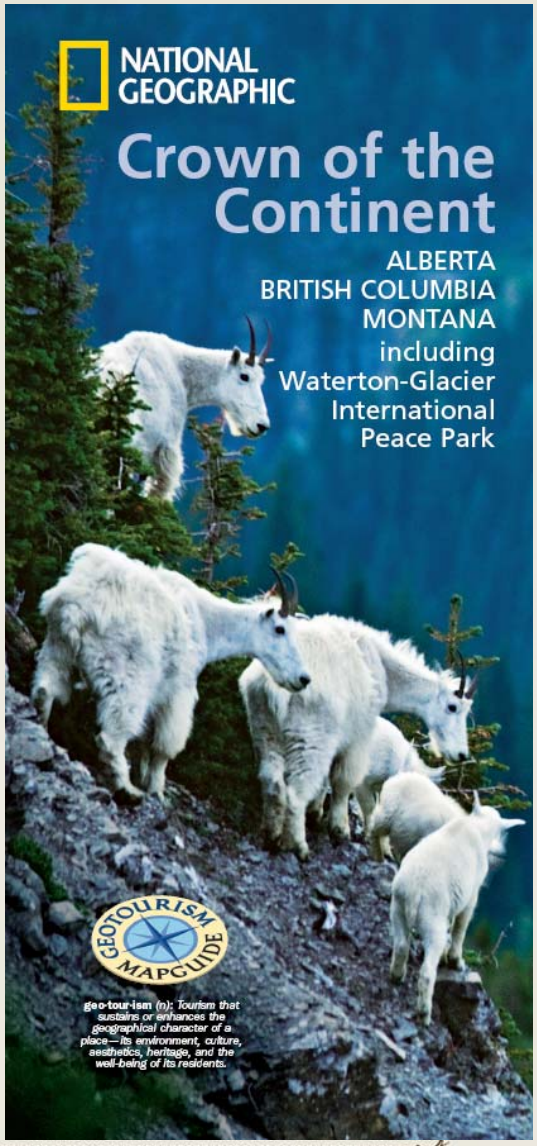
- Identify and understand regional character
- Appreciate economic and social benefit
- Educate and celebrate
- Sustain and enhance

# Why the Crown of the Continent?

- One of the world's most diverse temperate ecosystems
- Transboundary tribal heritage
- First international peace park
- Two World Heritage Sites

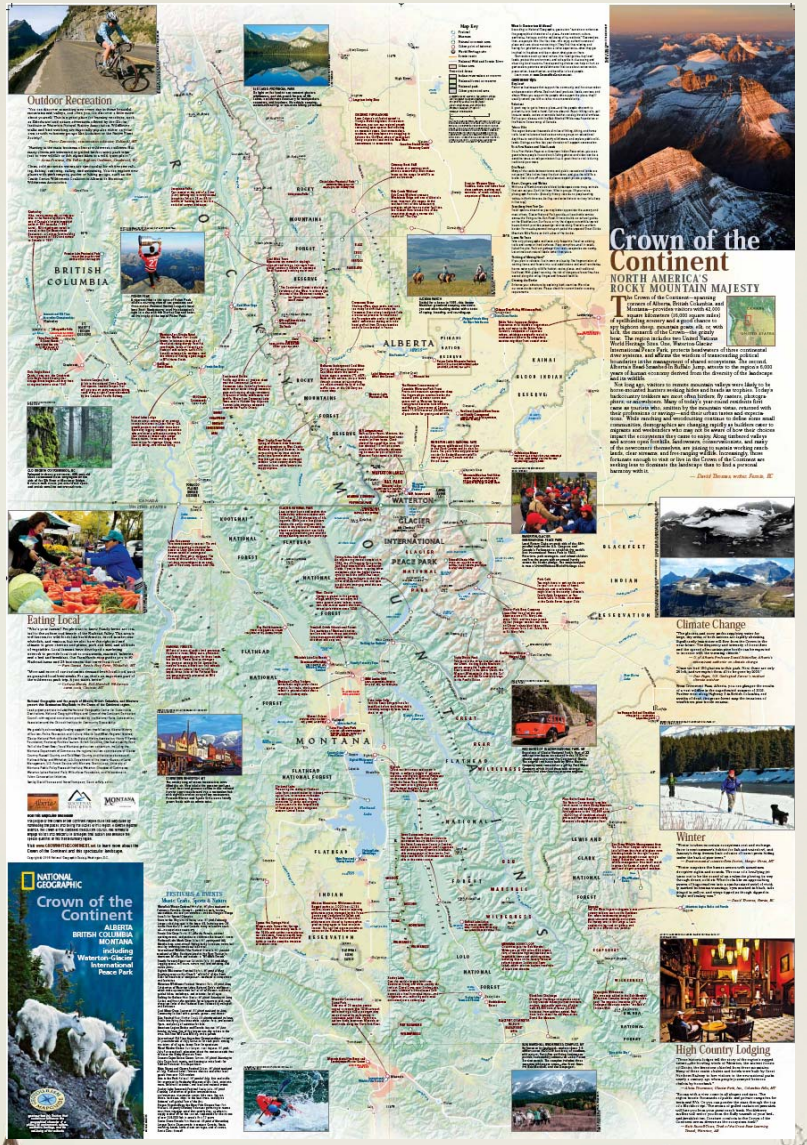
# Collaboration by the numbers

- 350 individuals submitted nominations
- Approximately 700 sites, events, topics nominated
- Dozens of media articles
- 64 community forums



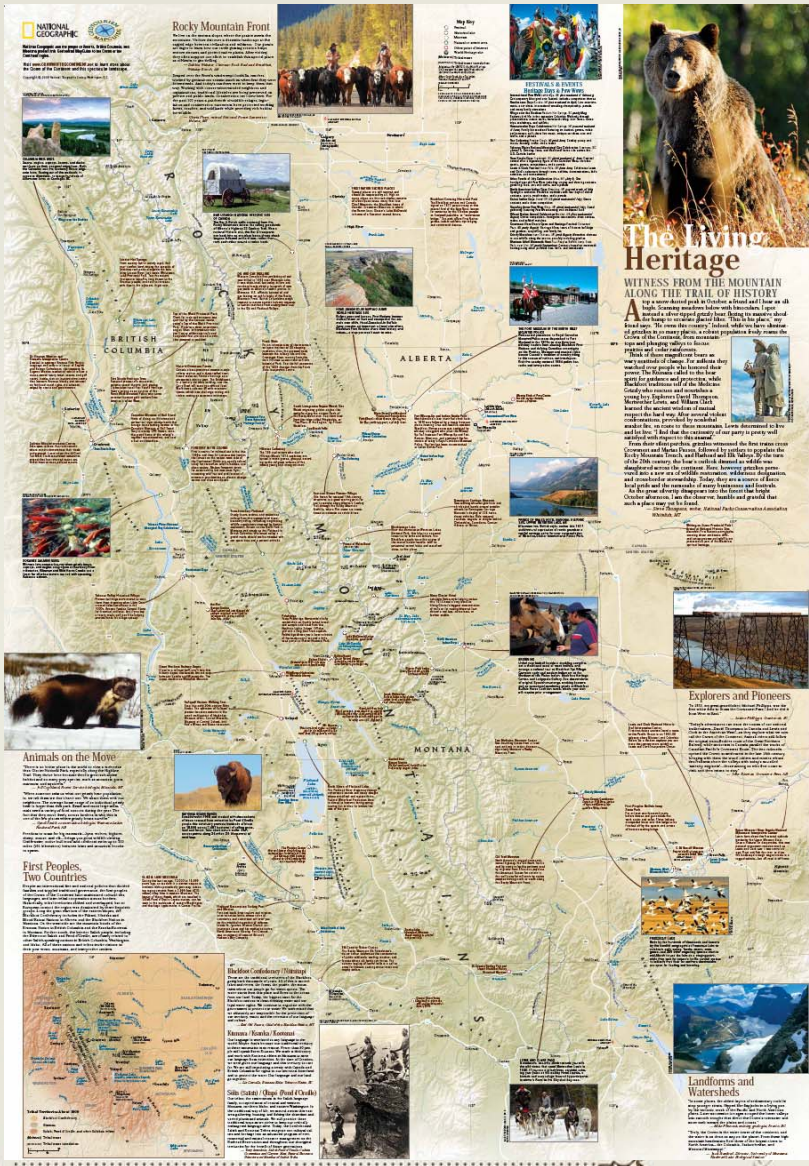
# The Contemporary Layer

- Communities
- Jurisdictions
- Modern issues
- Stewardship initiatives
- Make a difference



# The Historical Overview

- Map without boundaries
- First nations and tribes
- Natural landscapes
- Working landscapes
- Animals on the move

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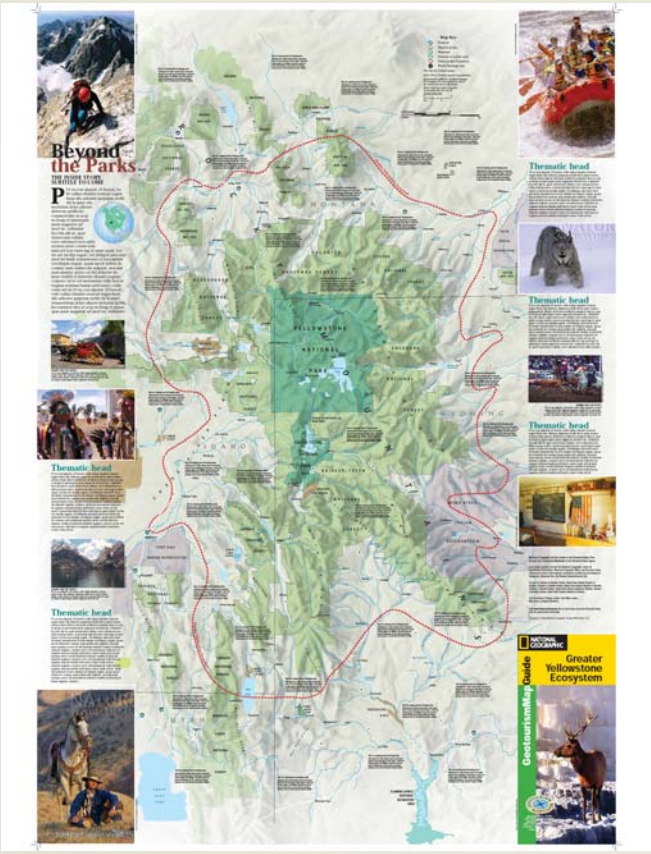
# Drill Down, Learn More

www.crownofthecontinent.net

- Ongoing nominations
- Additional places, experiences and topics
- Content provided by dozens of "field experts"

# Greater Yellowstone mapguide project




http://www.yellowstonegeotourism.net/home.html

# Montana Tourism & Recreation Charter

# Tourism Charter

- Tourism Advisory Council created and adopted the Charter in the fall of 2007.
- Overarching value statement - a list of guiding principles - encapsulating the goals and actions identified in the new Strategic Plan.

# Principles of Charter

1. Maintain integrity of place and destination appeal.
2. Promote and highlight the businesses, services and opportunities that are unique to Montana.
3. Promote sustainable resource conservation, including conservation of energy, water, wildlife, and compatible land uses.
4. Participate in and help lead community stewardship partnerships to maintain Montana assets.

# Principles of Charter

5. Identify and appeal to markets that value and seek to help sustain Montana's distinct character.

6. Foster a diversity of products and services that meet the demand of a demographic cross-section of the "geotourist" market.

7. Ensure visitor satisfaction and an enduring market demand through education of Montana residents about the benefits of sustainable tourism.

8. Work with ITRR, Travel Montana and other tourism organizations throughout the state to evaluate effective implementation of the Tourism Charter.

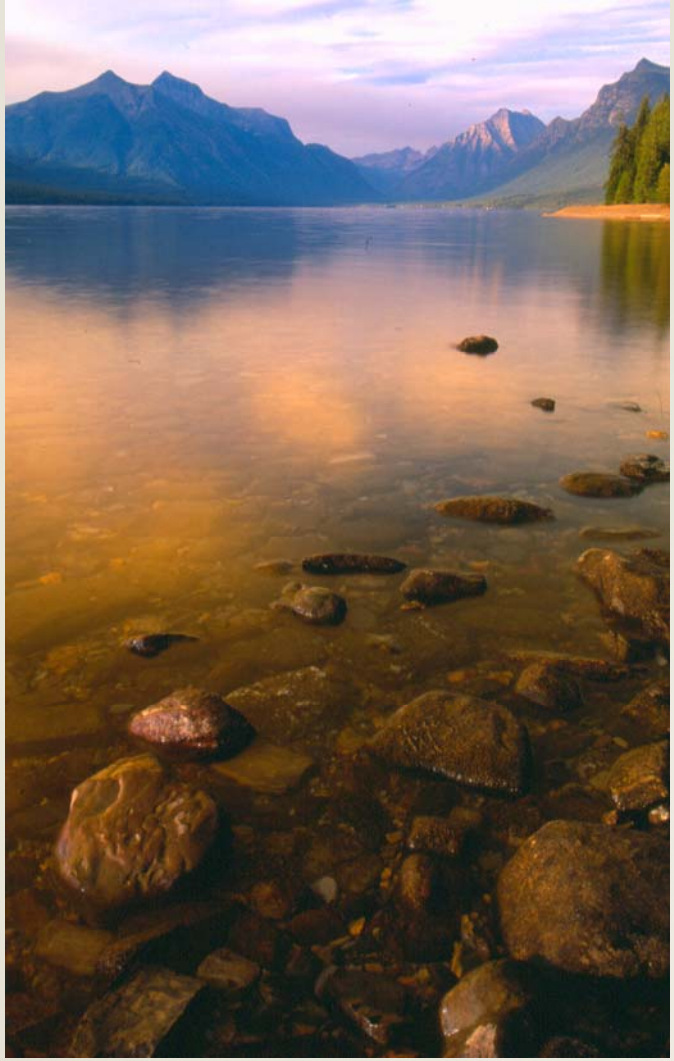
# Tourism Charter

- The TAC is inviting Montanans, Montana organizations, communities and government entities to adopt the Charter.
- Information and a template for endorsement can be found at:

  www.travelmontana.org/charter/charter.asp

For more information about the tourism industry in Montana visit:

www.TravelMontana.mt.gov



# Thank You

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