



2016 MONTANA GOVERNOR'S CONFERENCE
ON TOURISM & RECREATION

Actionable Intelligence:
MOTBD's Research & You



MONTANA
DEPARTMENT OF COMMERCE

INTRODUCTIONS

Erin Francis-Cummings

President & CEO
Destination Analysts



Katrina Pruitt-Andrews

Vice President of Marketing
nSight for Travel



Cree Lawson

Founder & CEO
Arrivalist



Maclaren Latta

Vice President of Consumer Insights
MERCURYcsc



Joe Ramler

Senior Economist
Montana Department of Commerce



OVERVIEW

How have we been measuring campaigns?

- nSight for Travel has been a partner since 2014
- Leisure Trends Group / NPD Group was a partner from 2009 through 2015
 - Conducted surveys to measure brand and advertising awareness
 - Provided us with estimated return on investment (ROI) for our tourism marketing efforts

In mid 2015, we felt there was a better way to measure our tourism marketing efforts...

OVERVIEW

What are we doing now & where are we headed?

- We now have three partners that provide a unique piece of the “marketing analytics pie”
 - **Destination Analysts**
 - Pre and post – campaign brand awareness by our target and other audiences
 - **nSight for Travel**
 - Measures Montana’s share of travel interest (searches) and conversion (bookings) in real time
 - **Arrivalist**
 - Provides a sample of actual arrivals to Montana after exposed to a marketing campaign

FY2016 WINTER CAMPAIGN OVERVIEW



Maclaren Latta

Vice President of Consumer Insights

MERCURYcsc



FY 2016 WINTER MARKETING GOALS

- Create demand for Montana as a premiere global travel destination through engaging and provocative communications that inspire, delight and guide our audience
- Capture more visitation and push visitors to lesser-traveled parts and lesser-traveled seasons of the state
- Increase internal and external collaboration to convert travel interest to action to ensure the highest economic impact from program resources

A scenic winter landscape featuring a calm river flowing through a valley. The banks are lined with dense evergreen trees heavily laden with snow. In the background, majestic mountains rise, their peaks also covered in snow. A lone fisherman in a red hat stands in the shallow water of the river, casting a line. The foreground shows snow-covered rocks and a clear reflection of the surrounding scenery in the water.

It's time.

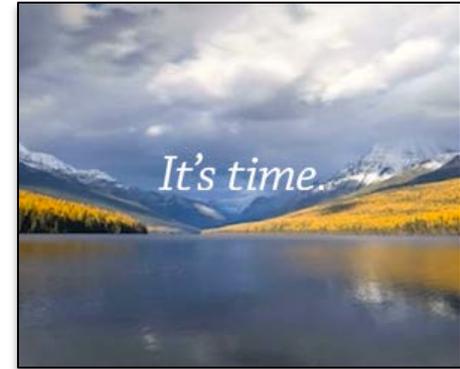
Fly fishing the Middle Fork of the Flathead River | **MONTANA**
| VISITMT.COM



FY 2016 WINTER CAMPAIGN STRATEGY

“IT’S TIME.” CONCEPT

- Build on past Montana campaigns
- Create continuity, but also evolve it
- Make a visit to Montana feel relevant to life right now
- Make people feel that seeing Montana is something they must do
 - not at some point down the road – but soon
- Capture what Montana is and what travelers take away from a Montana experience
- Capture a moment in Montana, ideally from a first person point-of-view

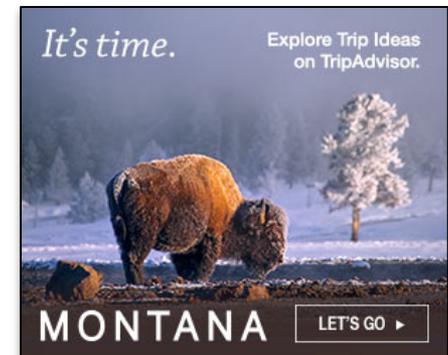




FY 2016 WINTER CAMPAIGN TACTICS

INTEGRATED PLAN

- **Paid media:** print, digital, search, digital radio
- **Paid social:** Instagram, Facebook, Twitter
- **Earned media:** ongoing pitches, public relations and media blitzes
- **Social influencer program:** influencers came to 15 ski areas
- **Owned social:** Instagram, Facebook, Twitter
- **VisitMT.com**





Erin Francis-Cummings
President & CEO
Destination Analysts

TRAVEL RESEARCH EXPERTISE

Destination Analysts is a market research company focused on **actionable marketing intelligence** for the travel & tourism industry.

Our team of **travel industry experts** has extensive, hands-on experience working with some of the world's greatest **tourism brands** and **destination marketing organizations**.

DESTINATION ANALYSTS TEAM



respected thought leaders in the travel industry

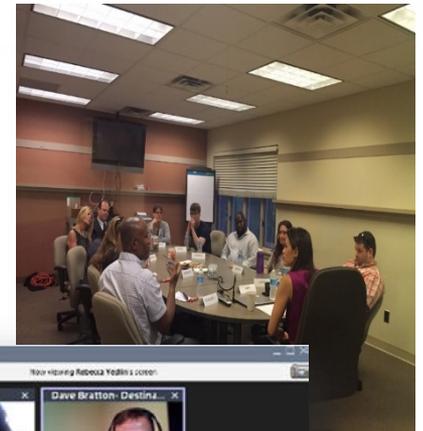
BRAND & CUSTOMER RESEARCH

- Brand Awareness & Understanding
- Branding Analysis
- Competitive Intelligence
- Consumer Sentiment Tracking
- Visitor Profiles
- Customer Intercept Surveys
- Messaging Evaluation
- Meetings Market Research
- Website User Profiles



USER EXPERIENCE & PERCEPTION RESEARCH

- Advertising Concept Testing
- In-Depth Interviews and Focus Groups
- Responsive Website Usability Testing
- Pricing Research
- Satisfaction Surveys



CONVERSION | ECONOMIC IMPACT | ROI

- Advertising Effectiveness & ROI
- Social Media ROI
- Website ROI
- Print Publications ROI
- Visitor Volume and Tourism Impact Studies
- Economic Impact Studies



LEADING SYNDICATED TRAVEL RESEARCH

- The State of the American Traveler
- The State of the International Traveler



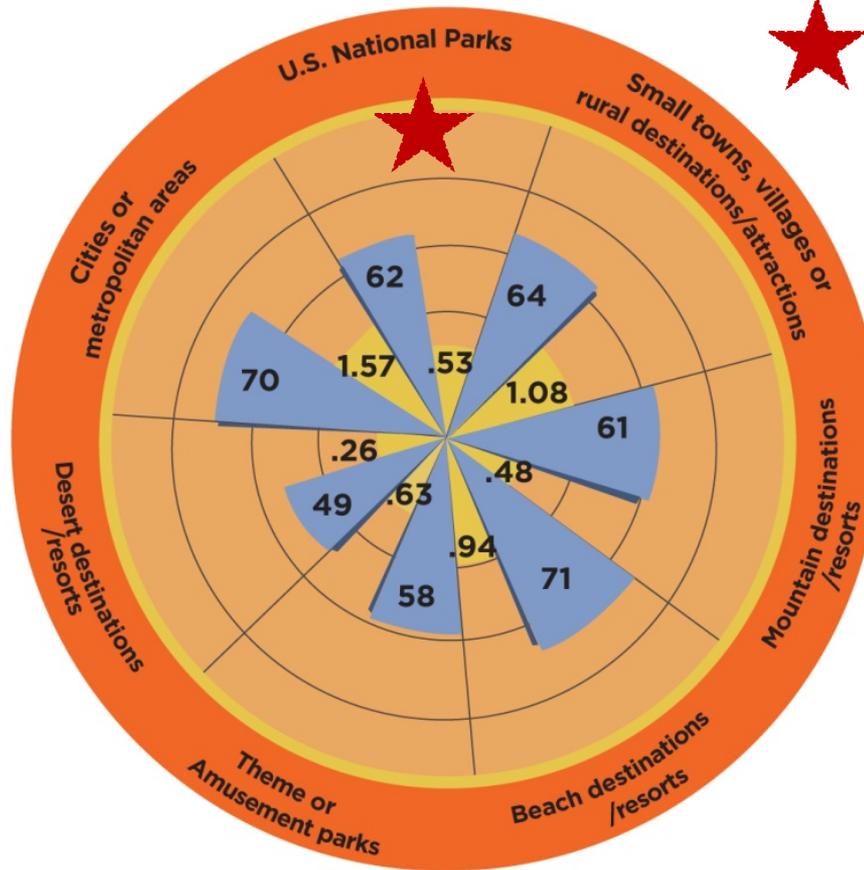
“Thanks to Destination Analysts, we have a more complete marketing “tool box” to help us as we continually push to have a stronger online presence. We now have invaluable insights about our web and social audiences that allow us to be smarter about our content.”

“Destination Analysts provides us with crucial research and insights that we use to improve our marketing and sales efforts. Their data on traveler motivations and consumer behaviors guides us in our decision making and execution of our programs.”

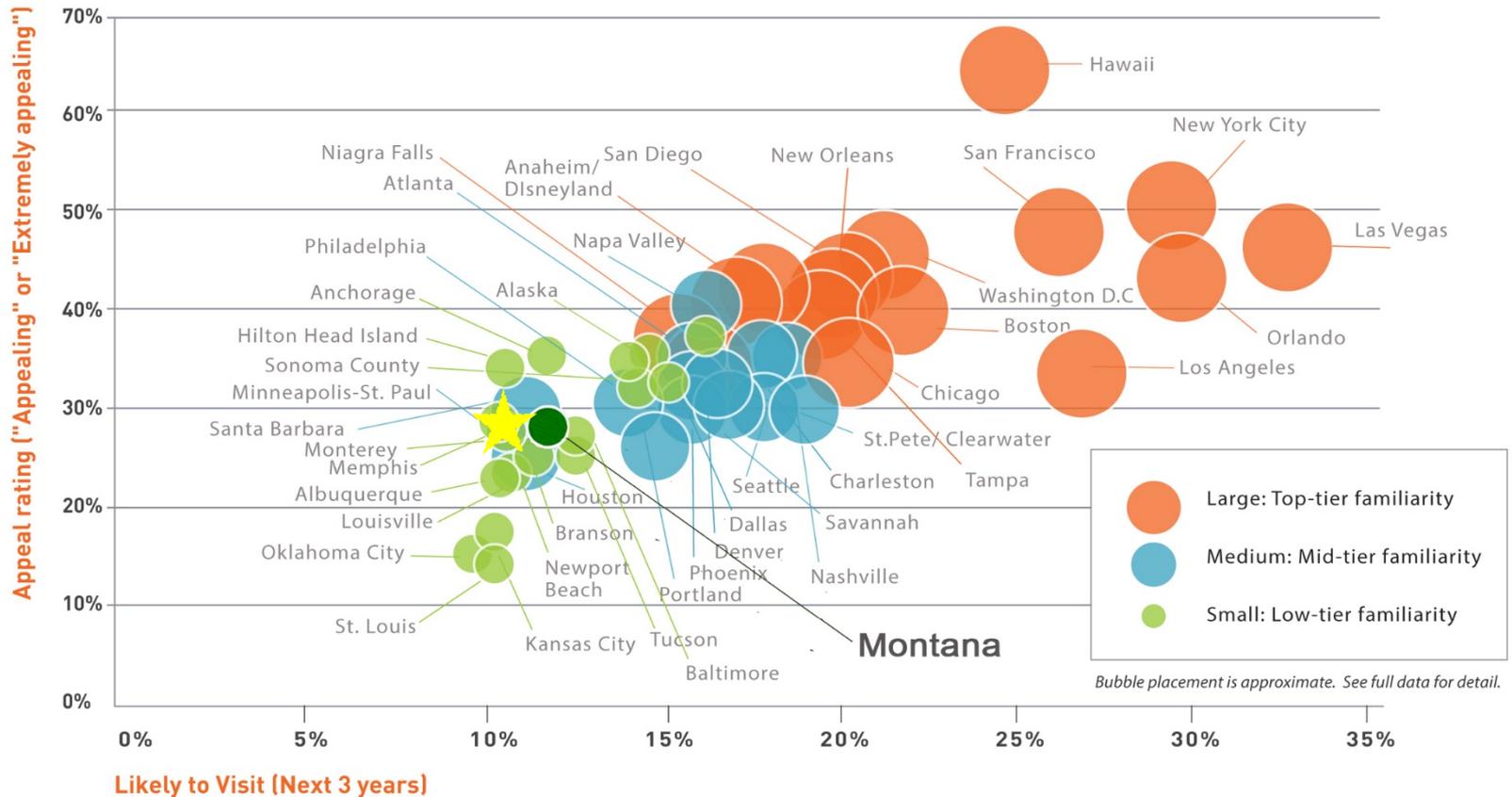
“Destination Analysts’ research confirmed that these destinations are valued by consumers, and helped us to better articulate and communicate their tourism assets through our various owned channels.”

Destination Excitement Index™ Beaches Narrowly Top Cities

Destination Excitement Index



Appeal Vs. Likelihood of Visiting



FY 2016 WINTER PRE-CAMPAIGN STUDY:

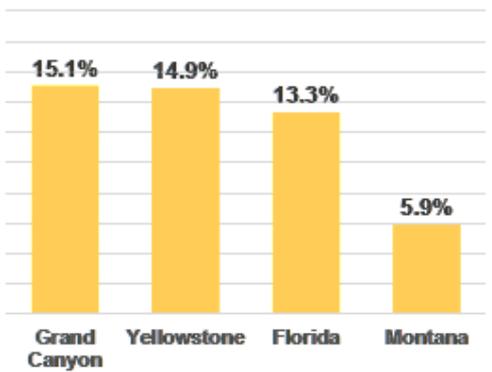
RESEARCH OBJECTIVES FOR DESTINATION ANALYSTS' PRIMARY RESEARCH

- Aided and unaided awareness of MT as a leisure travel destination
- Likelihood to visit the State
- Current perceptions of the State as a leisure travel destination
- Motivations for visiting MT and trip activities desired
- Awareness of MT travel advertising
- Earned and paid media recall

FY 2016 WINTER PRE-CAMPAIGN SURVEY METHODOLOGY

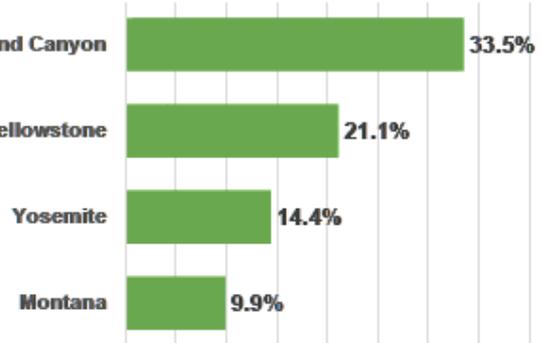
- Nationally representative sample of 4,000 American travelers residing outside Montana
 - **The Geotraveler** (2,072 people)
 - American travelers who prioritize culture, local food, nature
 - Will take an overnight trip outside the state of residence in the next year
 - Have a household income above \$50,000
 - At least some college education
 - **The Hyper Geotraveler** (245 people)
 - A sub-set of the Geotraveler who heavily prioritize culture, local food, outdoor and nature in their experience

Top-of-Mind Destinations with Montana's Attributes
 (% of Geotravellers—Unaided) - See slide 16 for full detail

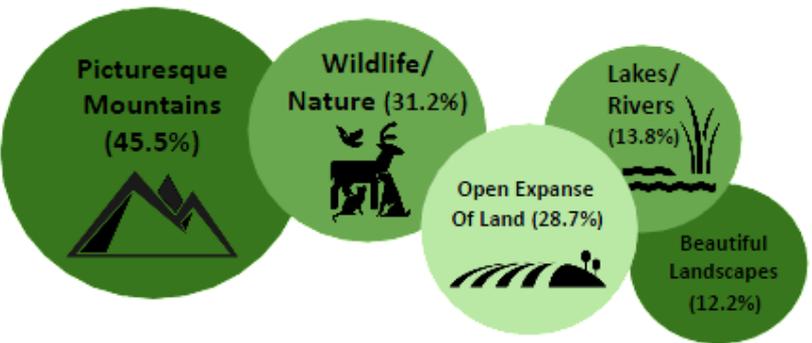


% Listing destination as top-of-mind for fitting this description:
 "Unique, natural, scenic beauty; Wide open spaces; Authentic wildlife viewing; Diverse outdoor activities; Small town(s) that offer relaxing hospitality; Breathtaking experiences; Cultural opportunities."

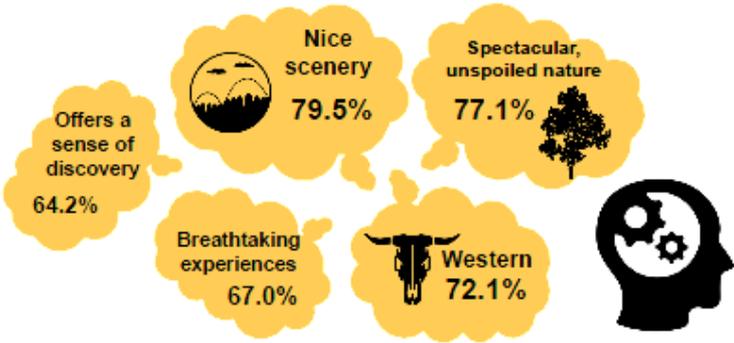
Top Western Rural Road Trip Destinations
 (% of Geotravellers—Unaided) - See slide 19 for full detail



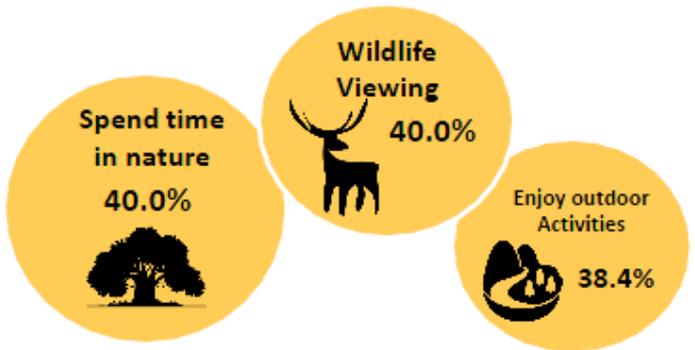
Top-of-Mind Images of Montana as a Leisure Destination
 (% of Geotravellers—Unaided) - See slide 27 for full detail



Top Association with Montana as a Leisure Destination
 (% of Geotravellers—Aided) - See slide 29 for full detail



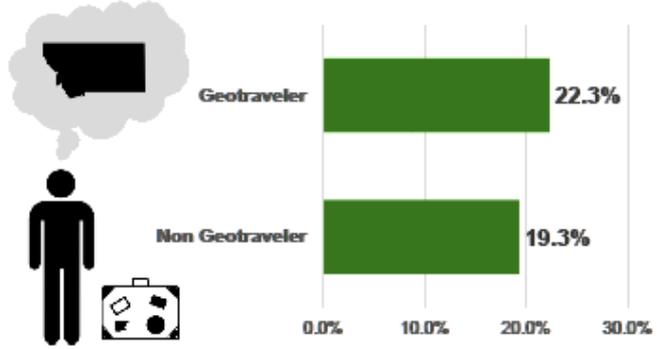
The Psychographics
Top Motivations for Visiting Montana
 (% of Geotravelers—Aided) - See slide 31 for full detail



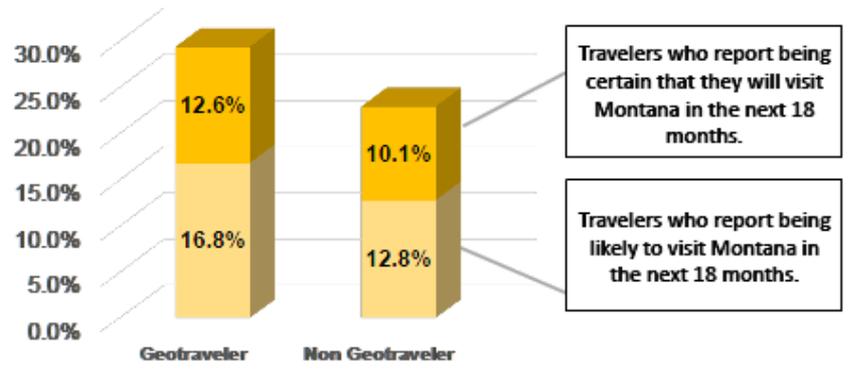
Top Desired Montana Trip Activities
 (% of Geotravelers—Aided) - See slide 32 for full detail



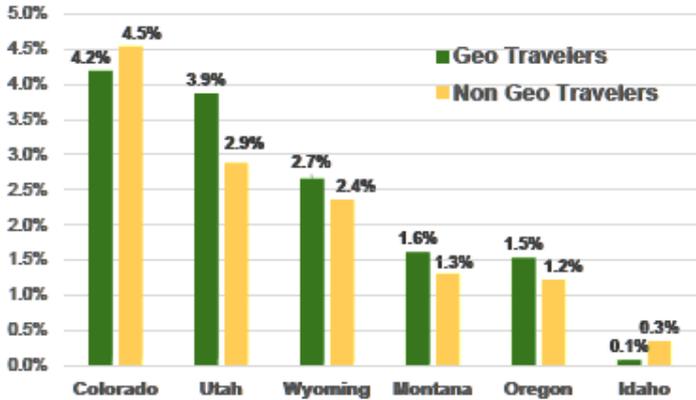
Considered Visiting Montana in the last 5 Years
 (% of Geotravelers & Non Geotravelers) - See slide 20 for full detail



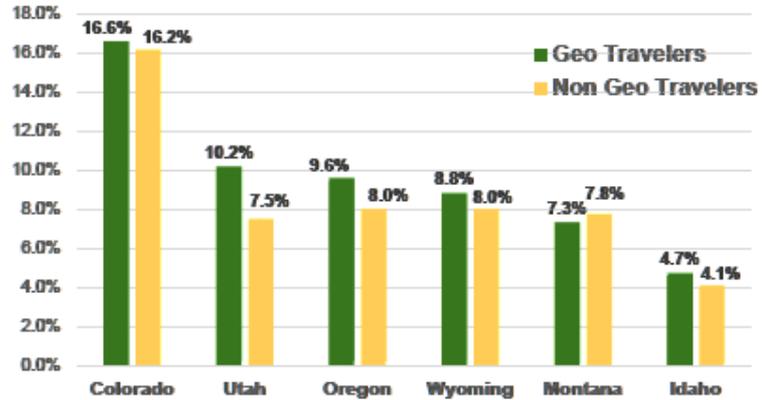
Likelihood to Visit Montana in Next 18 Months
 (% of Geotravelers & Non Geotravelers) - See slide 25 for full detail



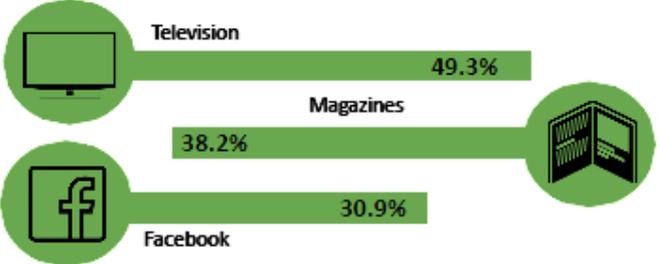
Advertising Awareness (Unaided-Past Three Months)
 (% of Geotravellers & Non Geotravellers) - See slide 17 for full detail



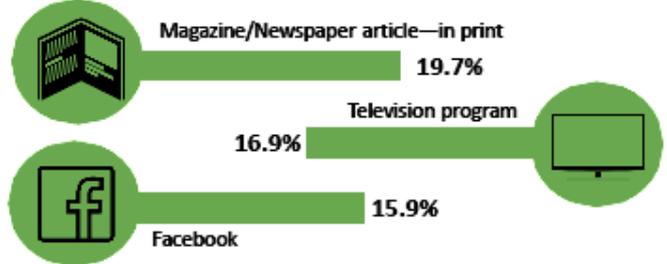
Advertising Awareness (Aided-Past Three Months)
 (% of Geotravellers & Non Geotravellers) - See slide 21 for full detail



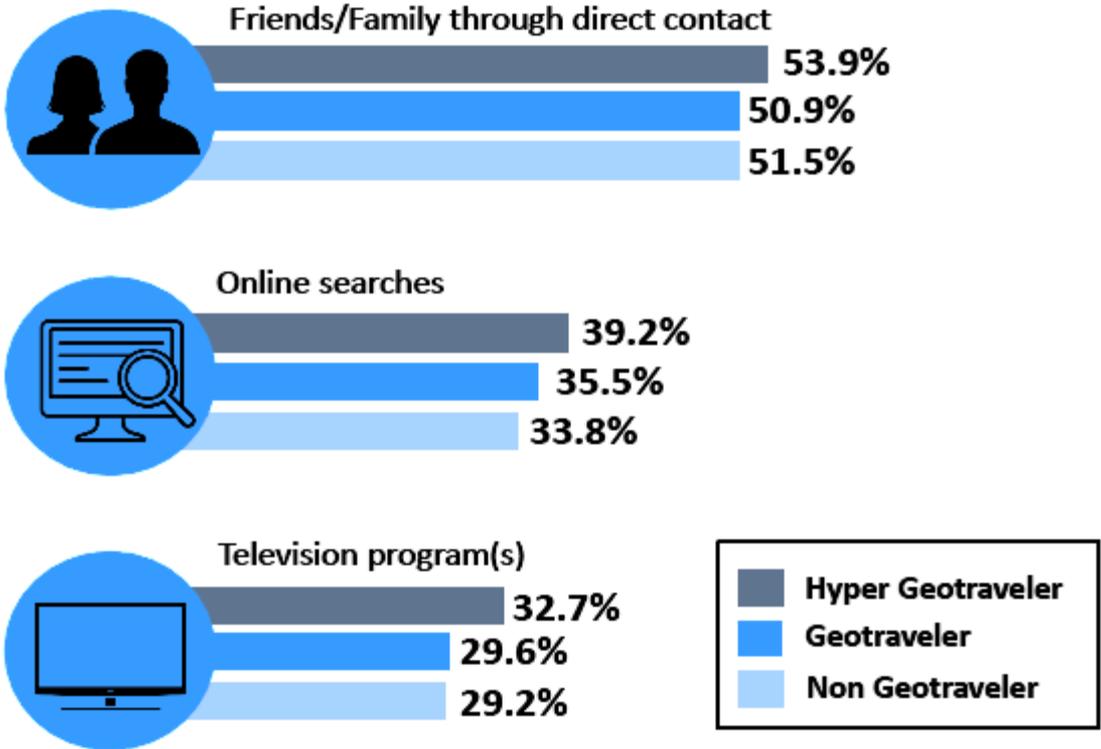
Montana Paid Media Recall (Aided—Past 3 Months)
 (% of Geotravellers) - See slide 18 for full detail



Montana Earned Media Recall (Aided—Past 12 Months)
 (% of Geotravellers) - See slide 30 for full detail



TOP SOURCES FOR TRAVEL INSPIRATION



Question: How do you typically get ideas for destinations to travel to for leisure? (Select all that apply) Base: All respondents.

FY 2016 WINTER POST-CAMPAIGN STUDY

- Scheduled to be completed by June
 - Survey time period runs from April 18th – 29th
 - Report will be compiled and presented June 3rd
- The post-campaign results will be used with the pre-campaign study to see how the FY 2016 Winter Campaign performed and influenced both actual and future visitors to Montana.



Katrina Pruitt-Andrews
Vice President of Marketing
nSight for Travel

OUR INDUSTRY CHALLENGE: PREDICTIVE VS HISTORIC INSIGHT

**FORWARD-LOOKING DATA CAN ANSWER:
WHO IS TRAVELING? FROM WHERE? TO WHERE? WHEN?**



LEISURE CONSUMERS GO TO THIRD-PARTY SITES TO SHOP FOR TRAVEL

Google for Inspiration



When Consumers Get Serious, They Go To Travel Sites



WITH 80 MILLION “LOOKS & BOOKS” DAILY NSIGHT AGGREGATES, ANALYZES AND REPORTS FUTURE CONSUMER BEHAVIOR



Market Trends

What growth can you expect and where are consumers who are most likely to book you?



Consumer Profiles

What are the top personas shopping you and how can you be relevant with today's best consumers?



Demand Forecasts

How are consumers reacting to you versus your competition and what are your options?



Rate Insight

Do you hold, raise or lower rate for future dates based on an integrated view of price and demand?

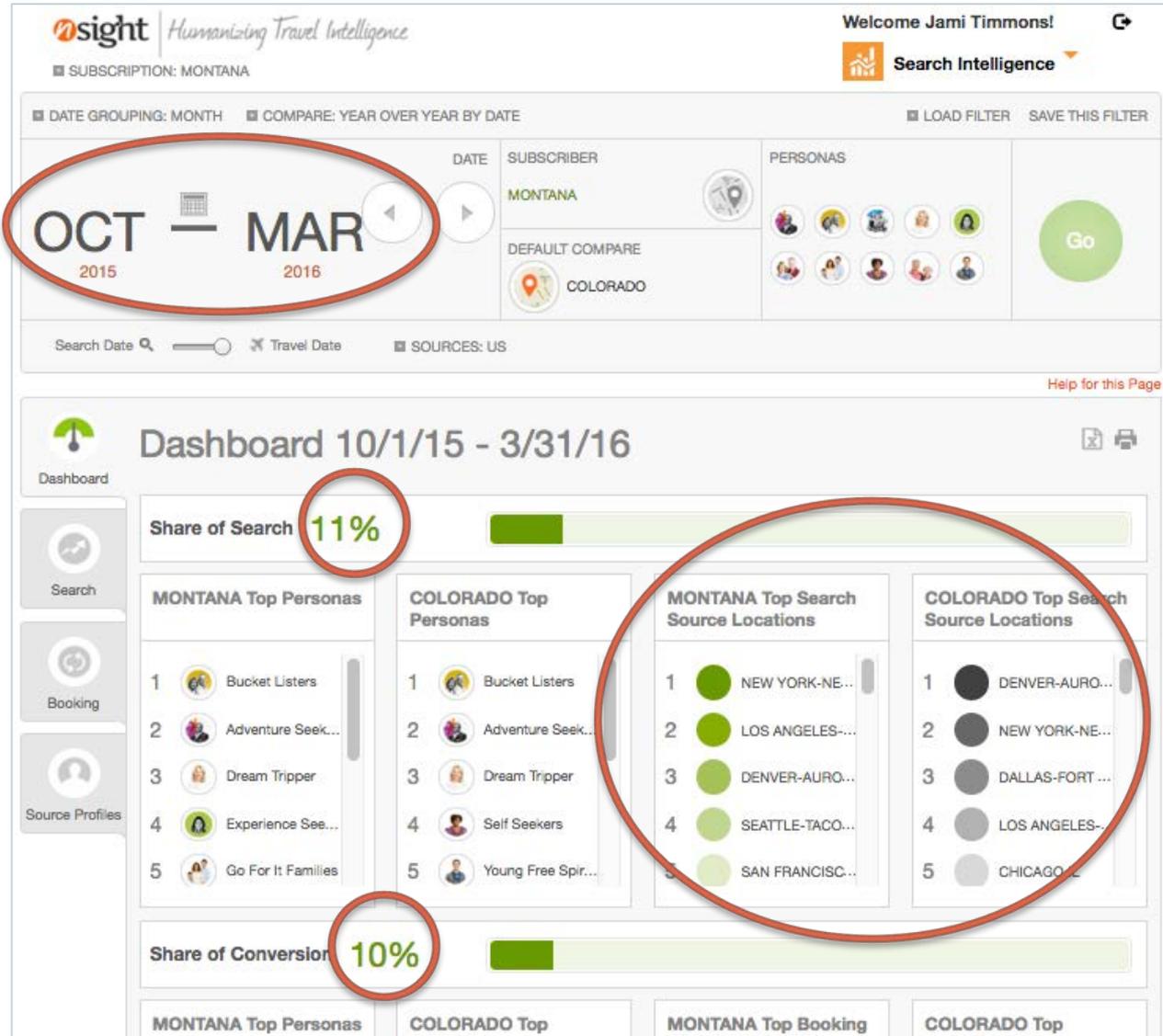
**Delivering Over 500 Hotels & Destinations
Worldwide:**

**Smarter Digital Marketing & Higher ROI
Stronger Competitive Strategy
More of the Right Guests**

THE INTERACTIVE MT DASHBOARD – WINTER

Any date range --
forward or back

THE WHEN



MT's share for
this date range

Top sources
v. competitor
for search
and booking

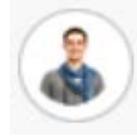
THE FROM
WHERE

TEN DEFINED “PERSONAS”

THE WHO



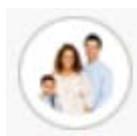
Adventure Seeker



Young Free Spirits



Dream Tripper



Go For It Families



Bucket Lister



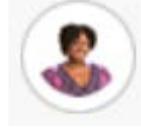
Couponing Family



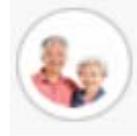
Experience Seeker



Frugal Boomer



Self Seeker



Visiting Family Retiree

PERSONAS SEARCHING/BOOKING MT TRAVEL



ADVENTURE SEEKER



- 25-35 years old
- Moving up in their career
- No family or very young family
- HHI @ 100K+
- 6+ trips per year, 2-3 trips around authentic experiences
- Frequently travels with other individual travelers
- Active on social media, spends time and money on interests
- Desired experience: Culture and adventure; motivation

DREAM TRIPPER



- 51-65 years old
- HHI @ \$150K+
- Couples traveling together; sometimes with friends
- Lots of planning, includes tours and package options
- 8+ trips per year, 2 big vacations and 6 getaways including visiting family
- Not highly engaged in social media, loyal to associations
- Desired Experience: Leisure and culture; story telling

BUCKET LISTER



- 66+ years old
- HHI @ \$100K+
- High percentage of income is fixed, tied to investments
- 5+ trips per year with longer stay periods
- Longer lead times, lots of research
- 2+ trips per year tied to visiting family
- Engaged in hobbies and interests
- Desired Experience: Culture; breath-taking

EXPERIENCE SEEKER

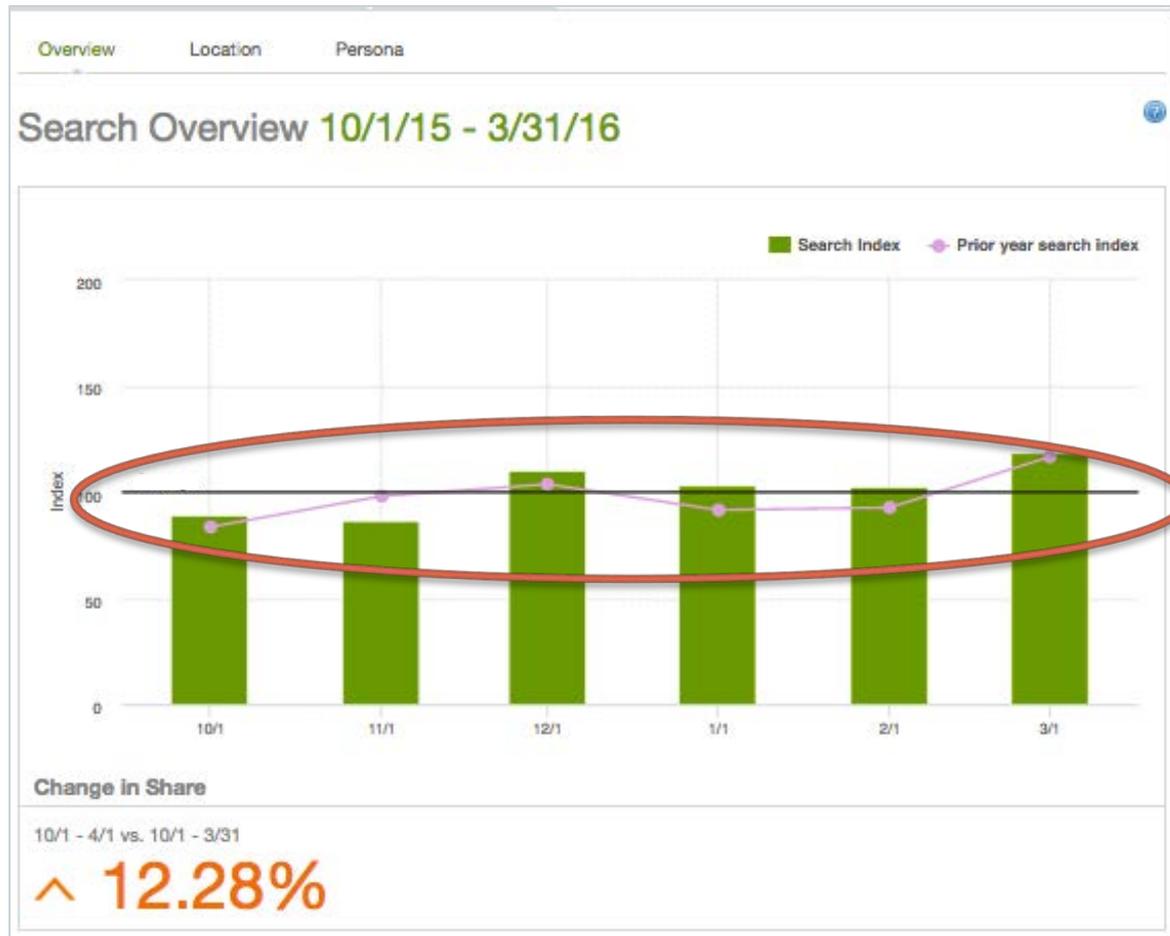


- 36-50 years old
- Professionals, established in career
- Double income, no kids
- HHI \$200K+, high disposable income
- 6+ trips per year
- Immersive travel experiences
- Looks at reviews, recommendations from experts and friends
- Desired experience: Leisure and culture; Me time

IS OUR MARKETING WORKING?

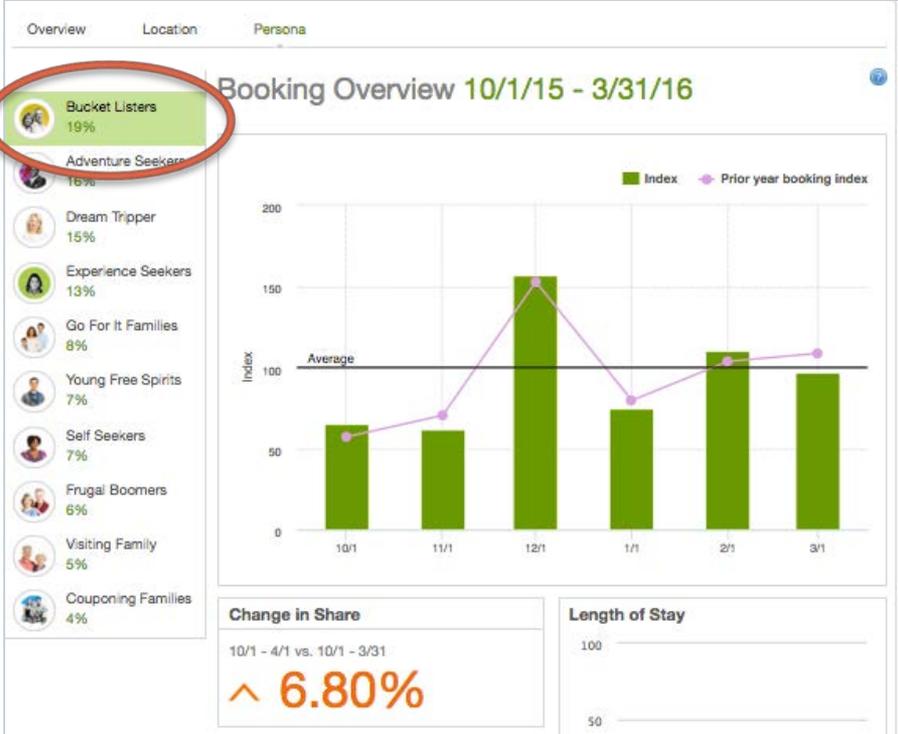
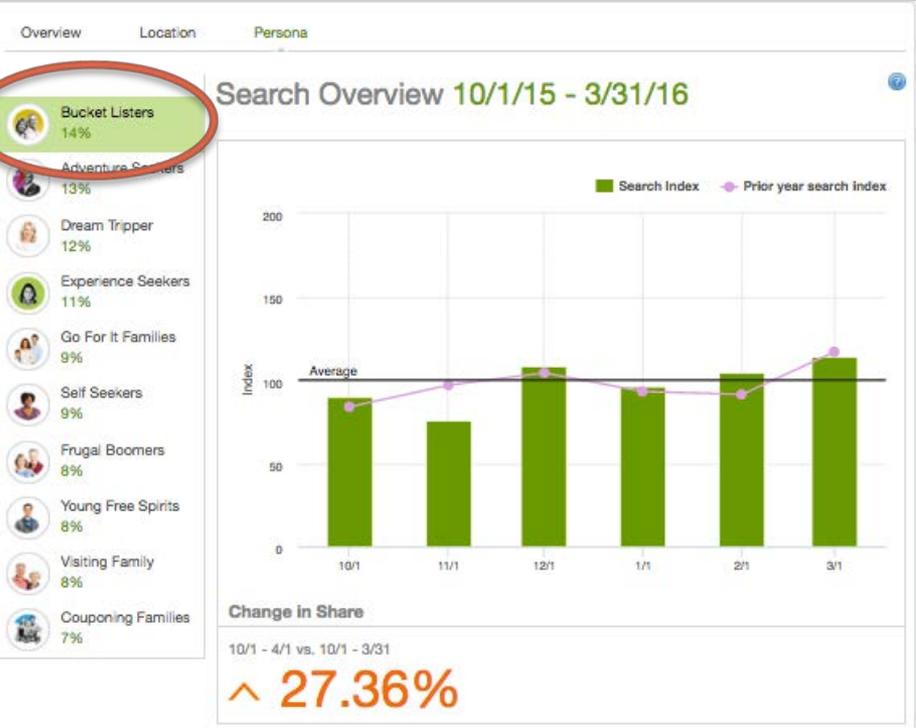
WINTER CAMPAIGN SEARCH TREND

Up 5 of 6 Months – 12.43% Increase YOY



BUCKET LISTER TREND

Up in Search and Bookings YOY - Up to 1/5 of Bookings Peak Months for December and February



LOOKING FORWARD – SUMMER CAMPAIGN

Any date range -- forward or back

nsight Humanizing Travel Intelligence
SUBSCRIPTION: MONTANA
Welcome Jami Timmons!
Search Intelligence
DATE GROUPING: WEEK COMPARE: YEAR OVER YEAR BY DATE LOAD FILTER SAVE THIS FILTER
JUN 01 2016 - AUG 31 2016
DATE SUBSCRIBER PERSONAS
MONTANA
DEFAULT COMPARE
COLORADO
Go
Search Date Travel Date SOURCES: ALL
Help for this Page

MT's share for this date range

Dashboard 6/1/16 - 8/31/16
Share of Search 16%
MONTANA Top Personas
COLORADO Top Personas
MONTANA Top Search Source Locations
COLORADO Top Search Source Locations
Share of Conversion 25%
MONTANA Top Personas
COLORADO Top Personas
MONTANA Top Booking Source Locations
COLORADO Top Booking Source Locations

Top sources v. competitor for search and booking

SUMMER - TOP 25 OPPORTUNITIES FOR MT

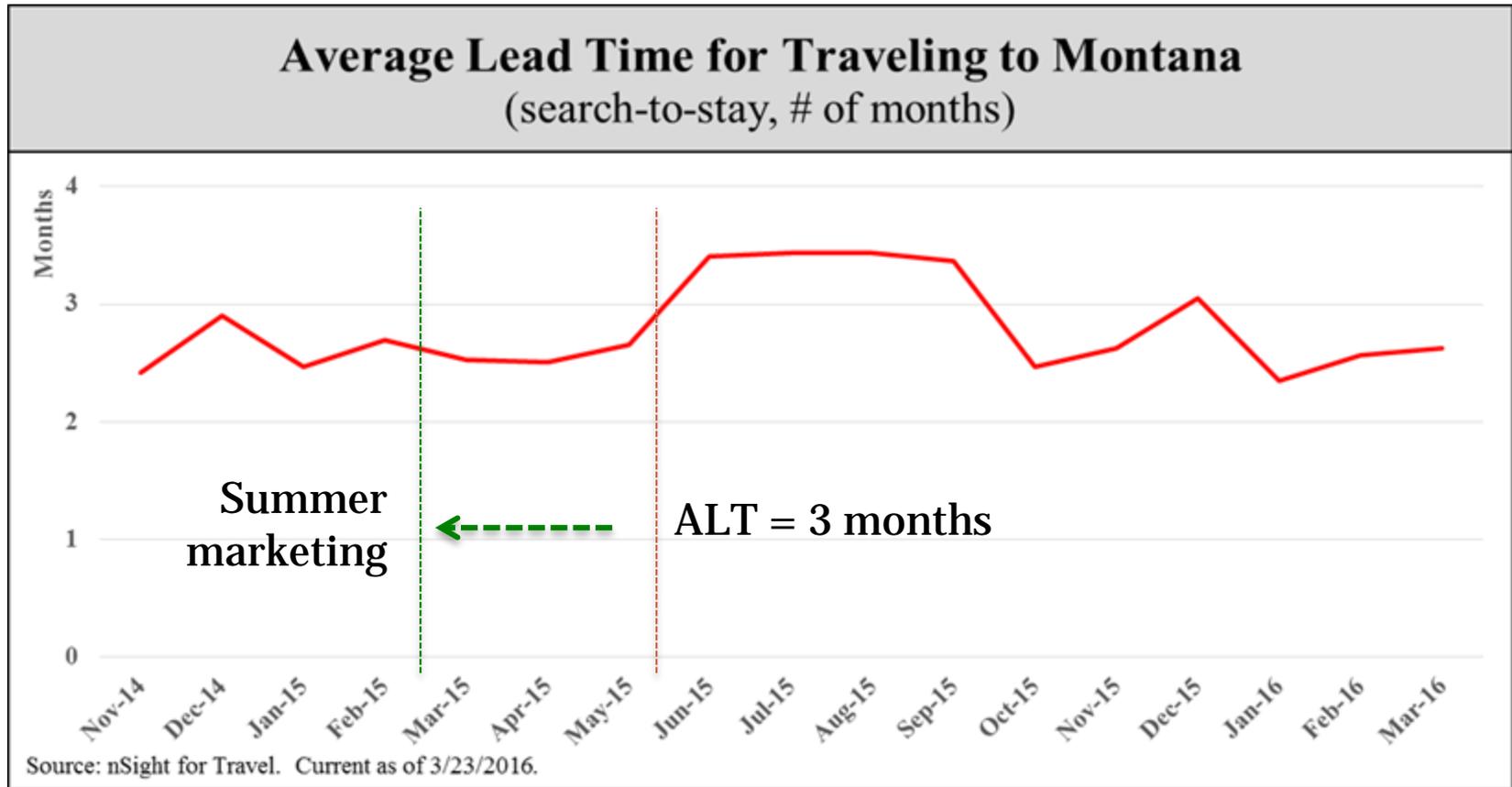
DOING WELL: LOS ANGELES, SAN FRANCISCO, AUSTIN
 OPPORTUNITIES: CHICAGO, PORTLAND, MIAMI, PITTSBURGH

MONTANA Top Search Source Locations		COLORADO Top Search Source Locations		MONTANA Top Booking Source Locations		COLORADO Top Booking Source Locations	
Rank	Name	Rank	Name	Rank	Name	Rank	Name
1	NEW YORK	1	NEW YORK	1	NEW YORK	1	DENVER
2	LOS ANGELES	2	DENVER	2	LOS ANGELES	2	NEW YORK
3	WASHINGTON DC	3	DALLAS-FORT WORTH	3	SAN FRANCISCO	3	CHICAGO
4	CHICAGO IL	4	ATLANTA	4	WASHINGTON DC	4	WASHINGTON DC
5	SAN FRANCISCO	5	CHICAGO	5	BOSTON	5	LOS ANGELES
6	BOSTON	6	WASHINGTON DC	6	CHICAGO IL	6	PHILADELPHIA
7	DALLAS-FORT WORTH	7	LOS ANGELES	7	PHILADELPHIA	7	SAN FRANCISCO
8	PHILADELPHIA-	8	BOSTON	8	SAN JOSE	8	BOSTON
9	SEATTLE	9	PHILADELPHIA	9	SAN DIEGO	9	DALLAS-FORT WORTH
10	MINNEAPOLIS-ST. PAUL	10	HOUSTON	10	DALLAS-FORT WORTH	10	COLORADO SPRINGS
11	ATLANTA	11	SAN FRANCISCO	11	BOZEMAN	11	BOULDER
12	HOUSTON	12	MINNEAPOLIS-ST. PAUL	12	ATLANTA	12	MIAMI-FORT LAUDERDALE
13	DENVER	13	SAN JOSE	13	SEATTLE	13	ATLANTA
14	SAN JOSE	14	MIAMI-FORT LAUDERDALE	14	PHOENIX	14	SEATTLE
15	SAN DIEGO	15	SEATTLE	15	CINCINNATI	15	MINNEAPOLIS-ST. PAUL
16	PHOENIX-SCOTTSDALE	16	AUSTIN	16	MISSOULA	16	PORTLAND-VANCOUVER
17	PORTLAND-VANCOUVER	17	PHOENIX	17	AUSTIN	17	HOUSTON
18	BALTIMORE	18	COLORADO SPRINGS	18	MINNEAPOLIS-ST. PAUL	18	PHOENIX
19	DETROIT	19	DETROIT	19	HOUSTON	19	PITTSBURGH
20	AUSTIN	20	TAMPA-ST. PETERSBURG	20	CHARLOTTE	20	AUSTIN
21	BOZEMAN	21	INDIANAPOLIS	21	DETROIT	21	ORLANDO
22	CINCINNATI	22	CHARLOTTE	22	COLUMBUS	22	SAN JOSE
23	MIAMI-FORT LAUDERDALE	23	PORTLAND-VANCOUVER	23	PORTLAND-VANCOUVER	23	COLUMBUS
24	PITTSBURGH	24	SAN DIEGO	24	PITTSBURGH	24	TAMPA-ST. PETERSBURG
25	CHARLOTTE	25	ORLANDO	25	DENVER	25	CINCINNATI

SUMMER – WHEN TO LAUNCH CAMPAIGN

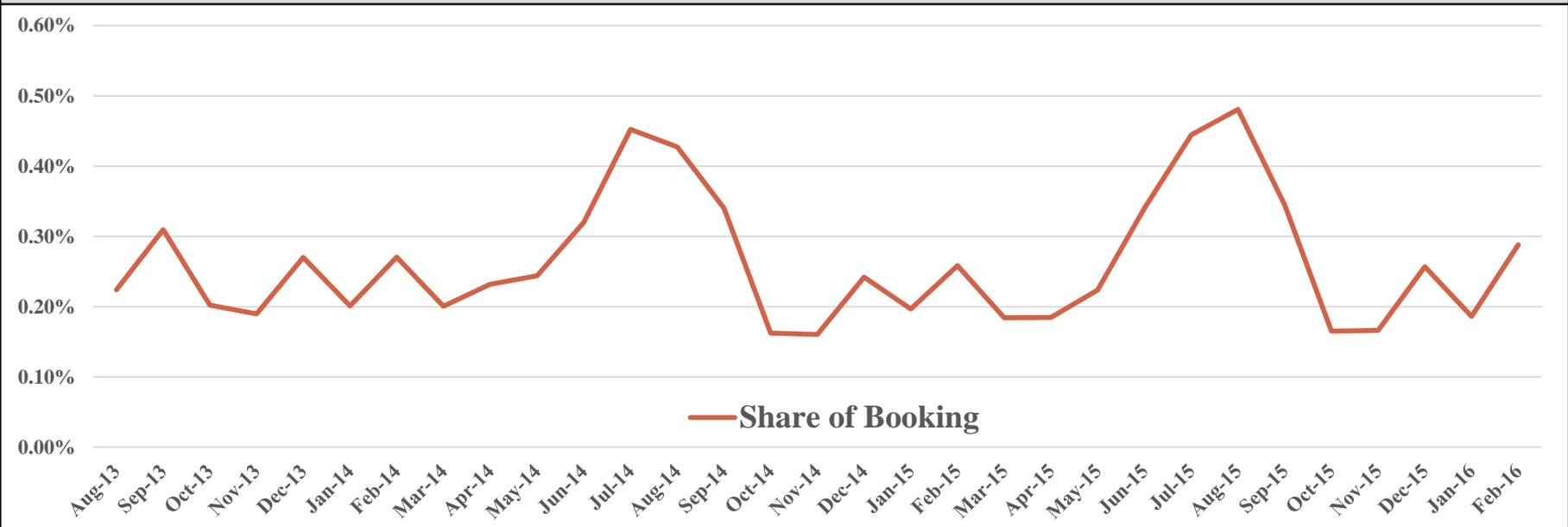
MAXIMUM LEAD TIME IN SUMMER

JUNE – AUGUST = 3+ MONTHS; PEAK AGAIN IN DEC



PEAK BOOKING SEASON JUNE – AUGUST WITH PEAKS IN DECEMBER

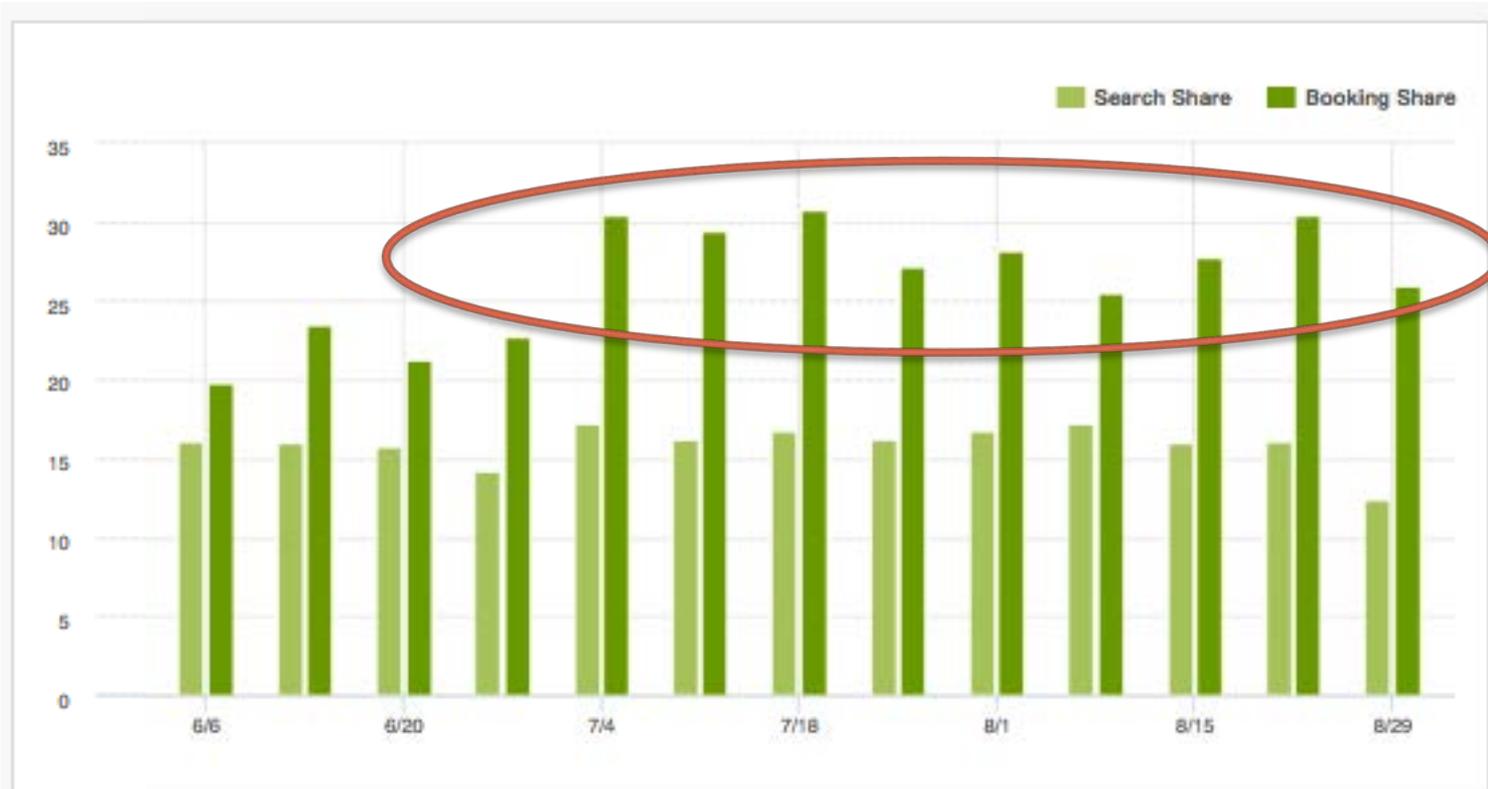
Montana's % Share of Bookings vs. All US Destinations



Source: nSight for Travel. Current as of 3/23/2016.

HOW ARE WE DOING AGAINST OTHER DESTINATIONS? MT v COLORADO SHARE TREND

BETTER BOOKING PERFORMANCE, JUN – AUG 2016



CAN WE SUPPORT NEW AIR ROUTES? MT DIRECT FROM DALLAS

DOUBLE DIGIT GROWTH FROM TOP DALLAS ROUTES

TOP 25 SEARCH RANK	SOURCE MARKET	BOOKINGS % GROWTH YOY 1/1/14 - 3/31/16	SEARCH % GROWTH YOY 4/1/16 -8/31/16	BOOKINGS % GROWTH YOY 4/1/16 -8/31/16
1	NEW YORK	3.30	48.67	17.66
2	WASHINGTON DC	4.19	46.59	16.16
3	CHICAGO	1.07	52.50	21.86
11	ATLANTA	7.51	48.24	10.07
22	MIAMI	1.31	107.28	65.81
*	CHARLOTTE	12.34	80.52	88.94

- Eastern US cities in the top 10 of busiest routes to Dallas
- They represented over 4 million travelers into Dallas in 2015
- They are in Montana's top 25 source markets for April- August 2016

HOW MT TAKES ACTION ON NSIGHT DATA

- **Winter and summer campaigns**
 - **Understand where to steal share from other destinations**
 - **Average lead time for campaign planning**
 - **Top geographic and persona for targeting consumers**
 - **Applications in PPC, display ads, web content, TripAdvisor/Expedia, email, and share with partners**
- **Additional air route justification**
 - **Feeder market growth trends**
 - **Forward-looking demand monitoring**

Predictive data helps MOTBD deliver more effective marketing and focused visitor development



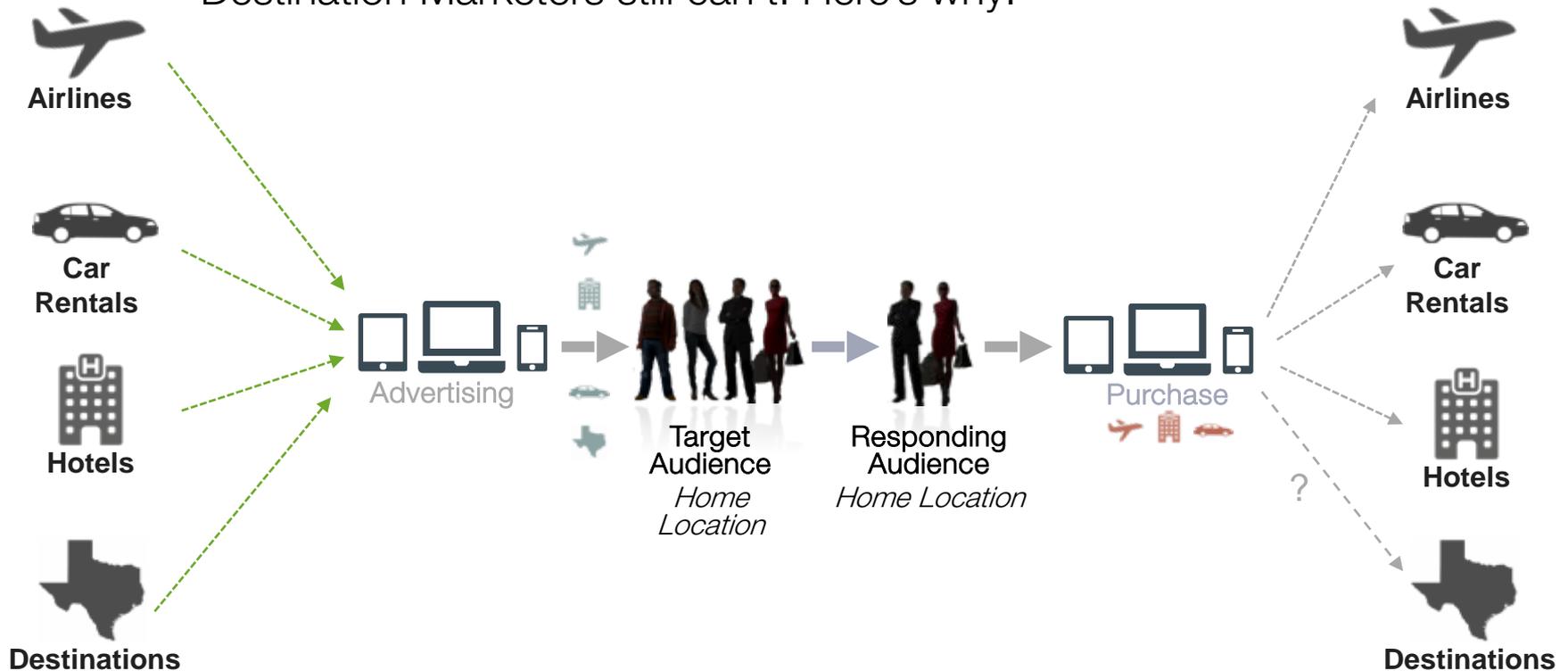
ARRIVALISTTM

Cree Lawson
Founder & CEO
Arrivalist

THE OPPORTUNITY



Airlines, Hotels, and Car Rental advertisers can show ROI on ads. Destination Marketers still can't. Here's why:



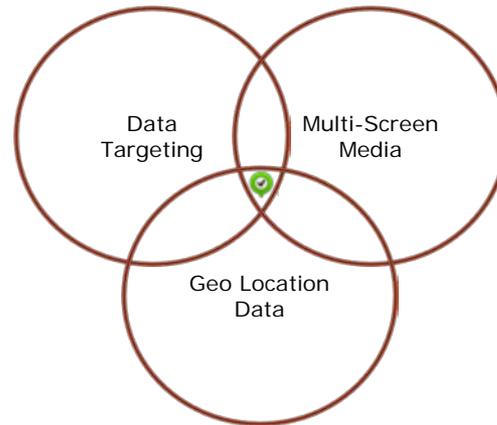
- Airlines, Hotels and Rental Car companies could close the loop but Destination Marketers cannot – Until now

QUICK OVERVIEW: HOW IT WORKS



Types of Media:

- Site Visit
- Banners
- Email
- Video
- Mobile



Presence = ROI

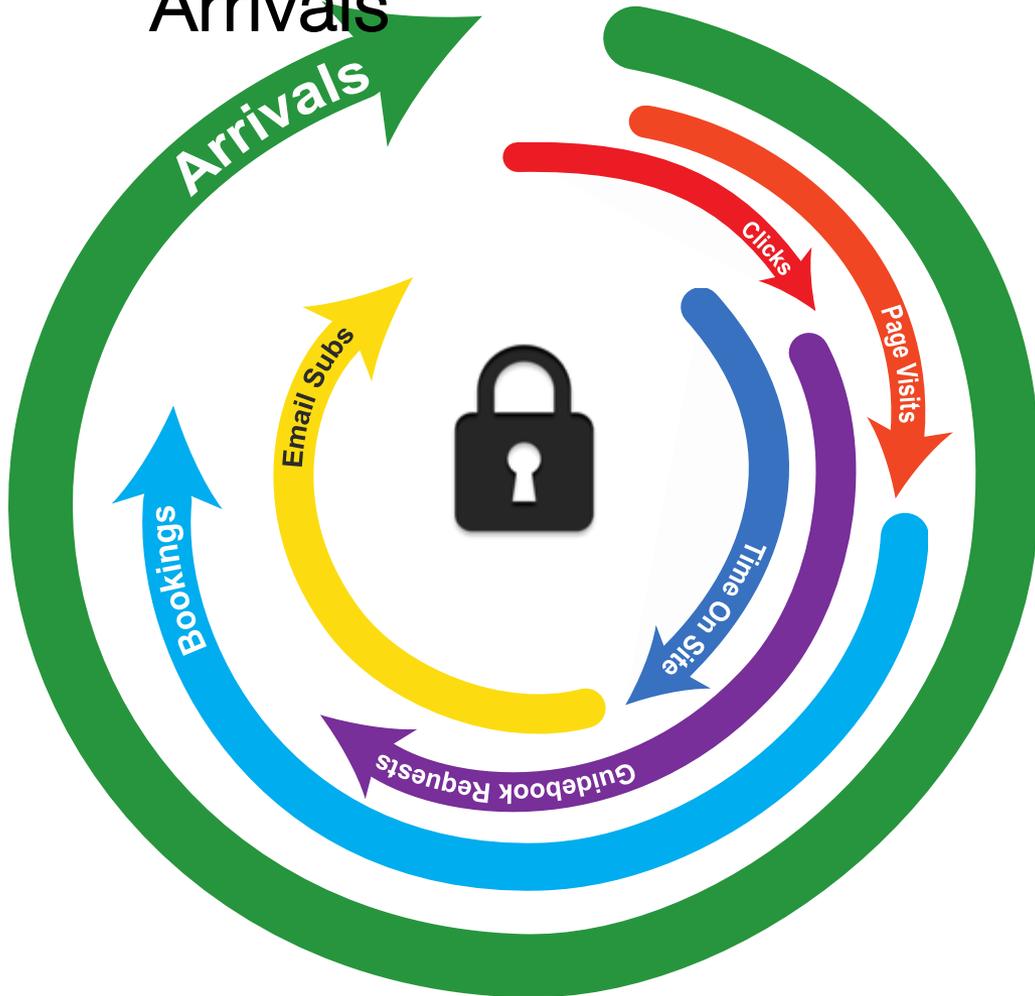
Arrivalist Technology

MEASURING ALL RESPONSE



Better measurement requires a better metric –

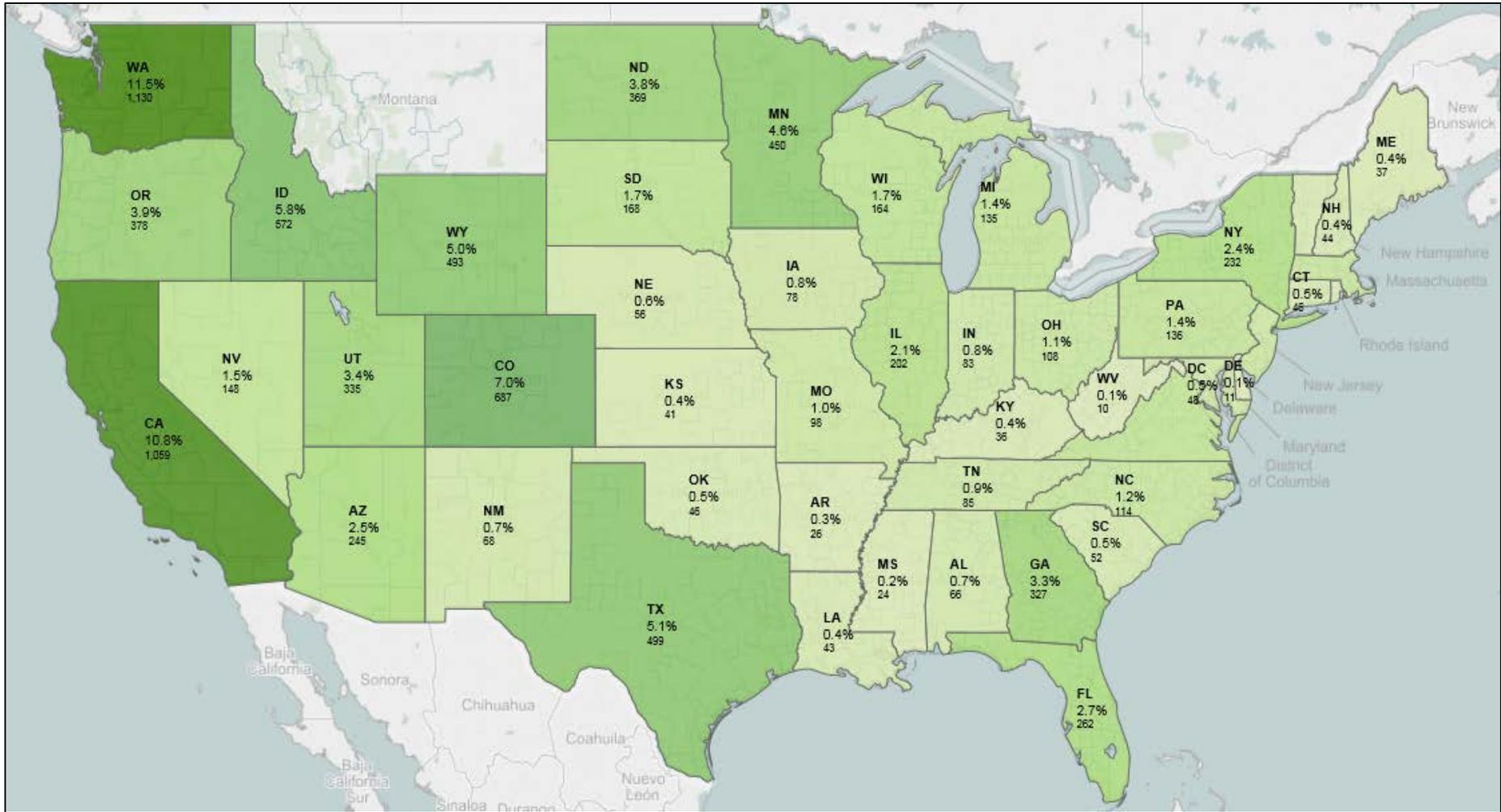
Arrivals



- Undeniable impact
- Representative of all visitation
- Tangible results
- Common Denominator
- Creates a 360 degree view
- All online media

Verified US Arrivals Into Montana by Origin State

October 2015 – March 15, 2016



Verified US Arrivals Into Montana by Origin State

October 2015 – March 15, 2016

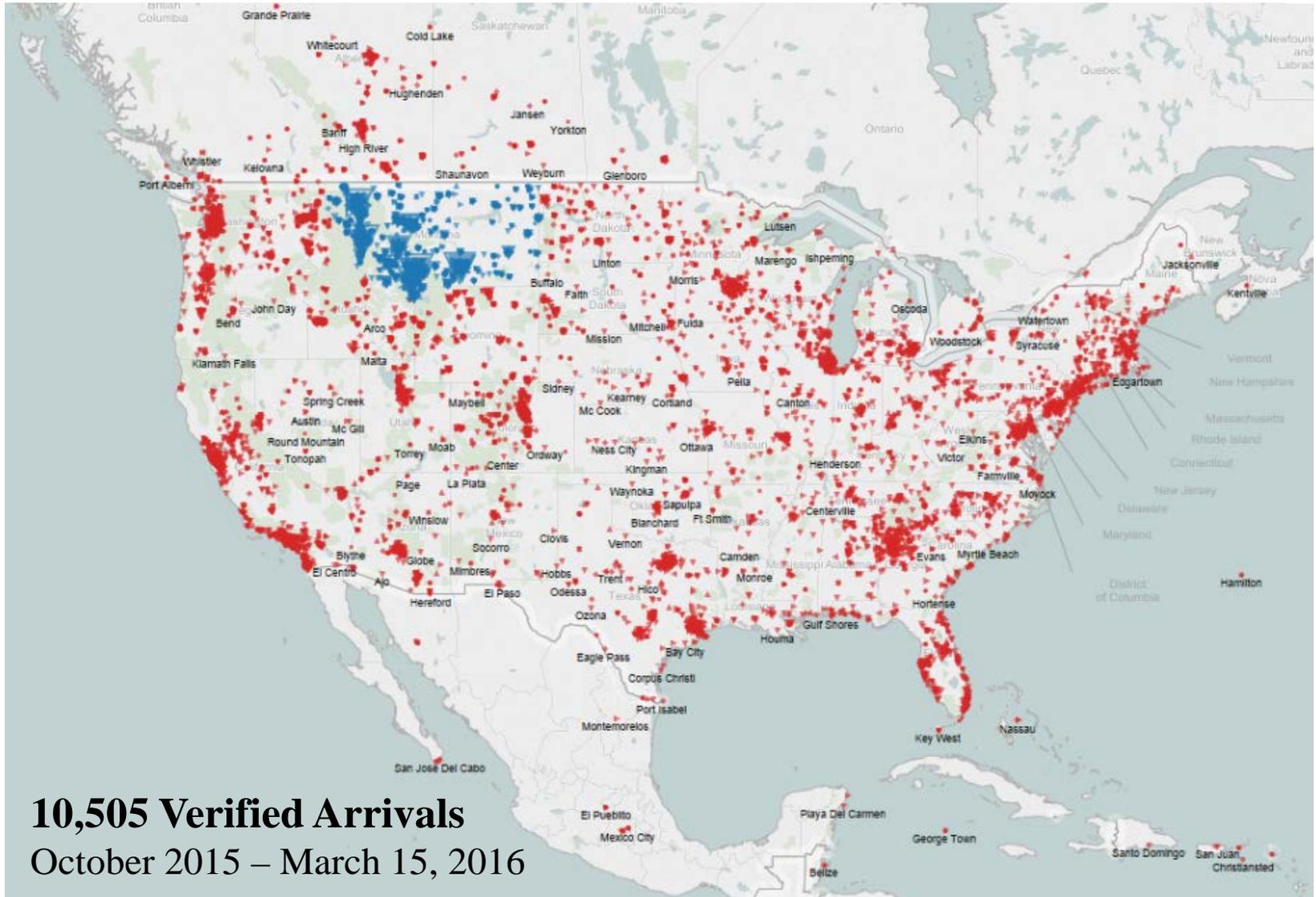


Rank	Origin State	Verified Arrivals	% of US Arrivals
1	Washington	1,130	11.5%
2	California	1,059	10.8%
3	Colorado	687	7.0%
4	Idaho	572	5.8%
5	Texas	499	5.1%
6	Wyoming	493	5.0%
7	Minnesota	450	4.6%
8	Oregon	378	3.9%
9	North Dakota	369	3.8%
10	Utah	335	3.4%
11	Georgia	327	3.3%
12	Florida	262	2.7%
13	Arizona	245	2.5%
14	New York	232	2.4%
15	Illinois	202	2.1%



Verified Arrivals Into Montana by Origin Market

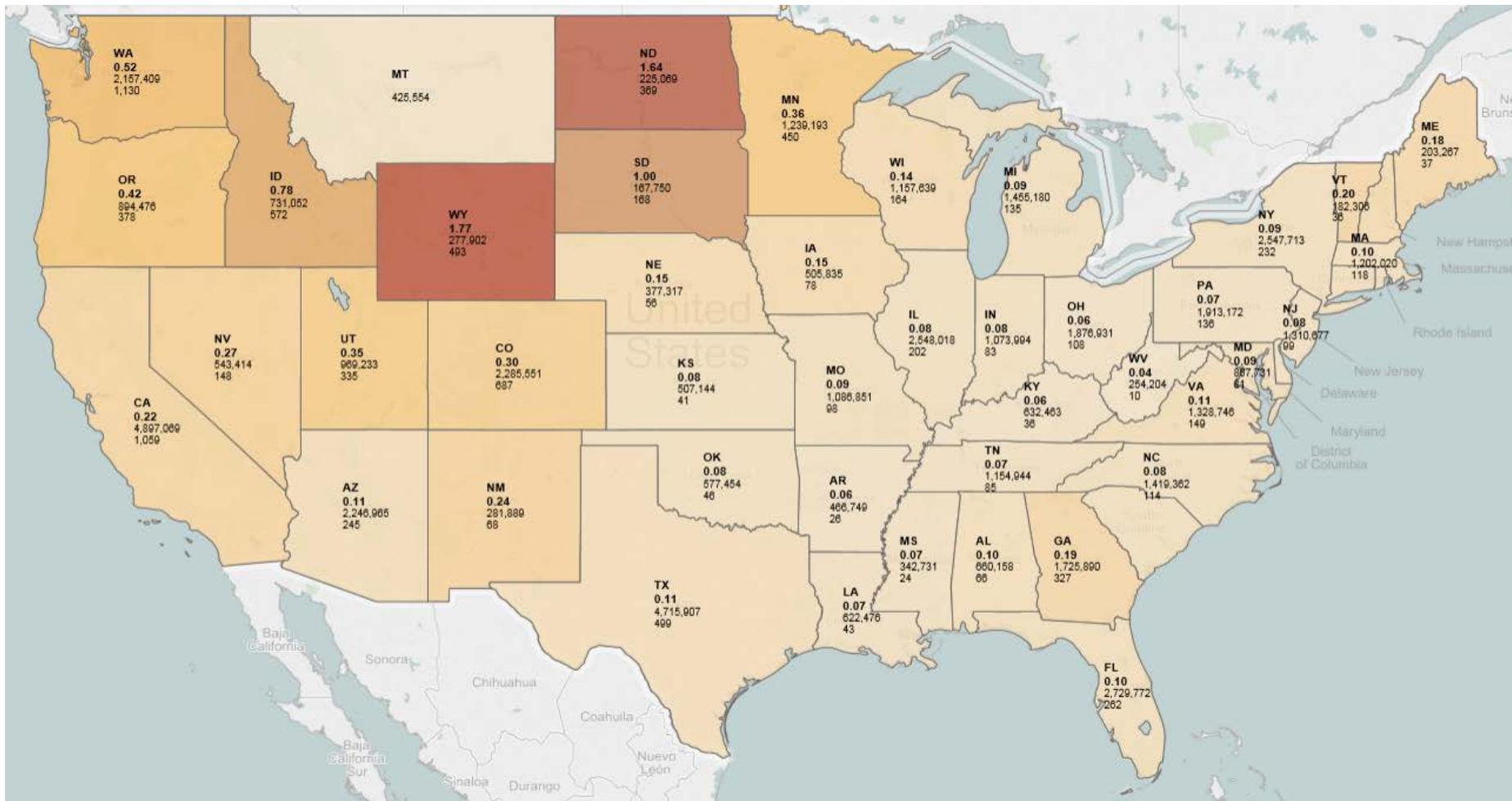
October 2015 – March 15, 2016



10,505 Verified Arrivals
October 2015 – March 15, 2016

US Arrivals to Montana per 1000 Exposures by Origin State

October 2015 – March 15, 2016





Verified Arrivals to Montana by Media Source

October 2015 – March 15, 2016

Media Source	Verified Arrivals	% of Total
Trip Advisor	3,649	34.7%
Sojern	2,770	26.4%
VisitMT	1,832	17.4%
On The Snow	813	7.7%
National Geographic	797	7.6%
Expedia	488	4.6%
Pad Squad	96	0.9%
Milennial	30	0.3%
Tube Mogul	18	0.2%
iExplore	12	0.1%
Total	10,505	--

These omit any sources/arrivals attributed to the FY 2016 Summer Campaign

Top Performing FY 2016 Winter Campaigns



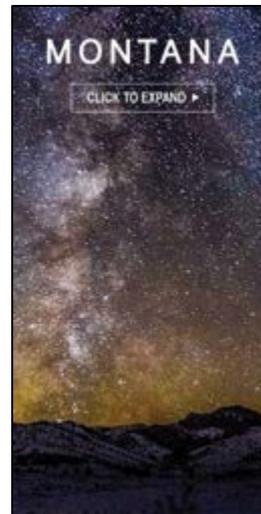
Media Source	Campaign	Arrivals	Exposures	APM
TripAdvisor	Montana Mobile Content Winter	1,077	314,658	3.42
VisitMT	Ski Areas and Resorts	203	103,568	1.96
TripAdvisor	Montana Destination Content Winter	1,004	646,405	1.55
VisitMT	Things To Do	270	231,482	1.17
VisitMT	Run Of Site	838	828,533	1.01
TripAdvisor	AdventorialDrivers Winter	1,293	1,505,118	0.86
Expedia	Skyscraper Winter	283	446,566	0.63
Sojern	Display Travel Intent Behav. Targ. Winter	2,698	5,404,105	0.5
Nat Geo	Pre Roll 15 Winter	299	1,282,116	0.23
On The Snow	Yellowstone DesktopDisplay Winter	346	1,517,302	0.23

Only campaigns with at least 200 attributed arrivals are included

Top Performing FY 2016 Winter Campaigns



Montana Mobile Content Winter



Non-Expanding Display



Expanding Display

Media Spend per Arrival

Top 5 Performing Media Sources



Media Source	Verified Arrivals	Media Spend	Media Spend per Arrival
Trip Advisor	3,649	\$ 50,000	\$ 13.70
Sojern	2,770	\$ 47,500	\$ 17.15
VisitMT	1,832	--	--
On The Snow	813	\$ 25,000	\$ 30.75
National Geographic	797	\$ 54,000	\$ 67.75
Total	9,861	\$ 176,500	\$ 17.90

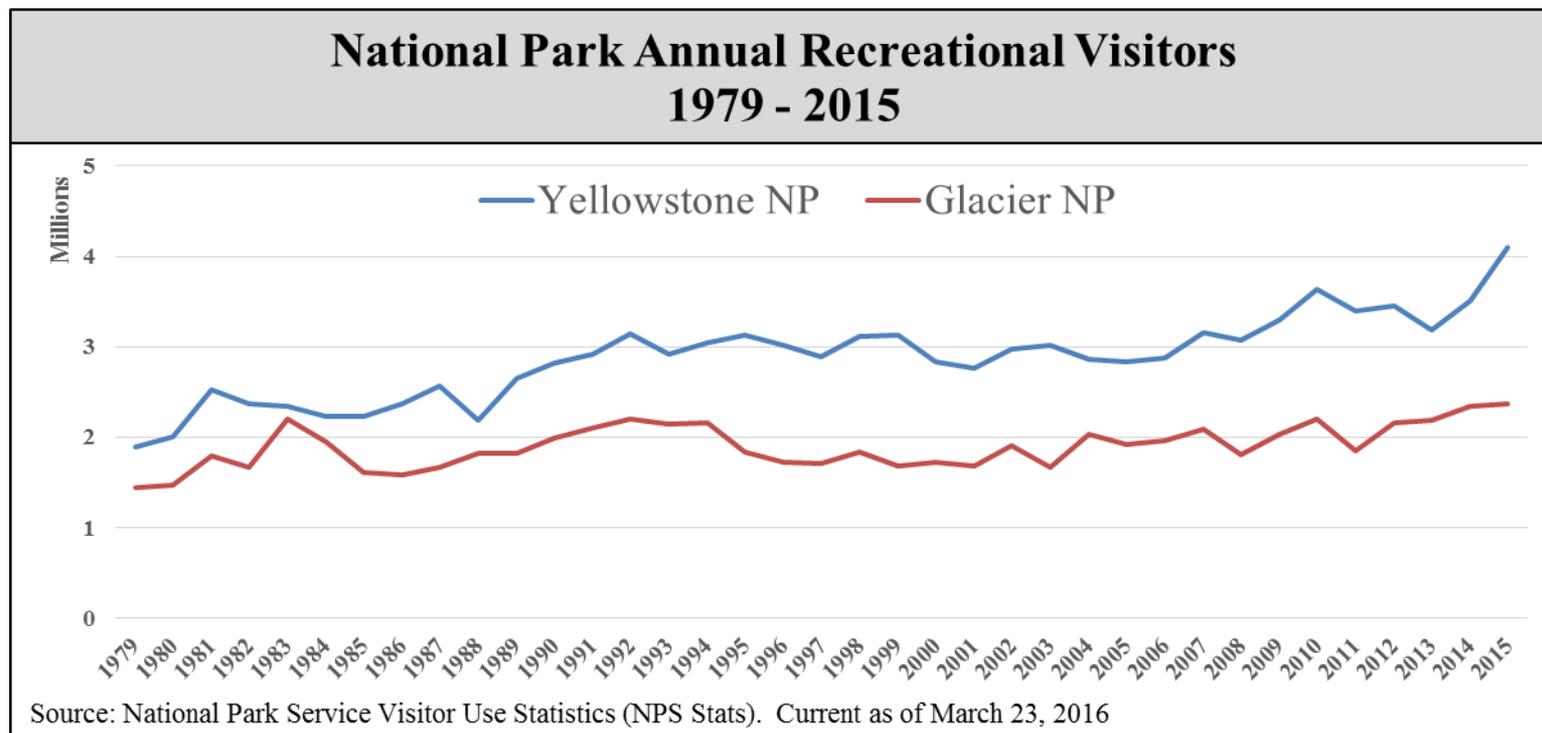
Source: Arrivalist & Spark

- This table compares total media spend by media source for the top 5 performing sources for the paid digital FY 2016 Winter Campaign



Joe Ramler
Senior Economist
Montana Department of Commerce

OTHER DATA SOURCES



YELLOWSTONE NATIONAL PARK

- 4.097 million recreational visitors in 2015 (16.6% increase over 2014)

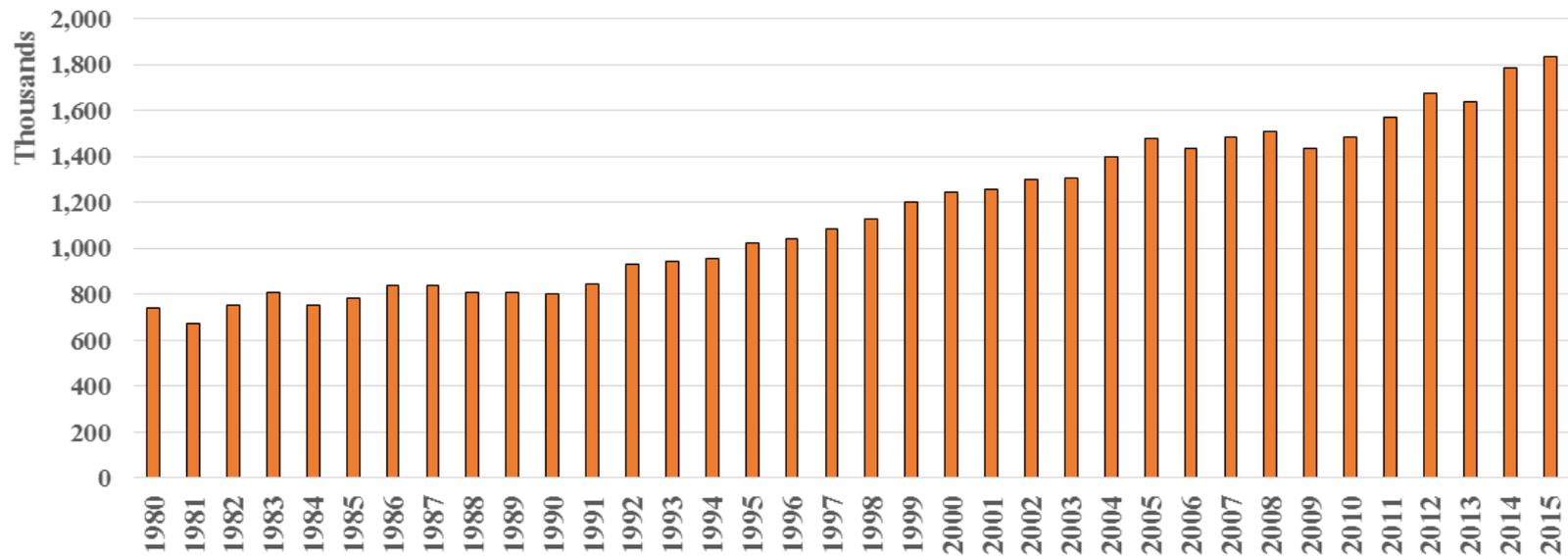
GLACIER NATIONAL PARK

- 2.366 million recreational visitors in 2015 (1.2% increase over 2014)



OTHER DATA SOURCES

Montana Airport Deboardings, 1980 - 2015



Source: MT Department of Transportation, Aeronautics Division. Current as of March 23, 2016

MONTANA AIRPORT DEBOARDINGS

- 1.84 million deboardings in 2015
- 2.9% increase over 2014 (1.78 million)



OTHER DATA SOURCES

PRELIMINARY 2015 Montana Nonresident Traveler Expenditures & Economic Contribution

INSTITUTE FOR TOURISM & RECREATION RESEARCH
UNIVERSITY OF MONTANA

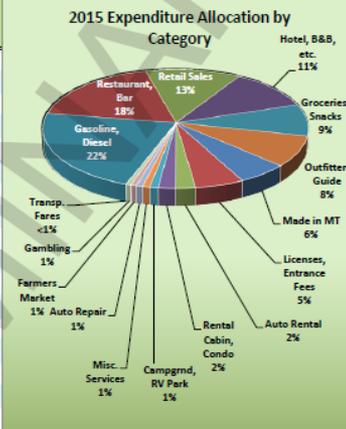
UNIVERSITY OF MONTANA

2015 Contribution of Nonresident Traveler Expenditures to Montana's Economy

- In 2015, nonresident visitors to Montana spent an estimated \$3.60 billion in the state. (See Table 1 below)
- This \$3.60 billion in local spending directly supports \$2.97 billion of economic activity in the state, and supports an additional \$1.92 billion of economic activity, indirectly. (see Table 2, below)
- The estimated total contribution of nonresident spending to Montana's economy was \$4.89 billion in 2015.

Table 1 - 2015 Nonresident Traveler Expenditures¹

Expenditure Category	Average Daily Per Group ^{2,3}	Allocation by Category	Total Expenditures ^{2,4}
Gasoline, Diesel	\$31.95	22%	\$792,560,000
Restaurant, Bar	\$26.80	18%	\$660,200,000
Retail Sales	\$18.39	13%	\$457,500,000
Hotel, B&B, etc.	\$16.44	11%	\$405,060,000
Groceries, Snacks	\$12.58	9%	\$310,270,000
Outfitter, Guide	\$12.36	8%	\$297,860,000
Made in MT	\$8.35	6%	\$202,810,000
Licenses, Entrance Fees	\$8.07	5%	\$194,360,000
Auto Rental	\$3.21	2%	\$79,090,000
Rental Cabin, Condo	\$2.80	2%	\$67,600,000
Campground, RV Park	\$1.37	1%	\$33,700,000
Misc. Services	\$1.09	1%	\$27,370,000
Auto Repair	\$1.06	1%	\$26,220,000
Farmers Market	\$0.93	1%	\$22,100,000
Gambling	\$0.79	1%	\$19,650,000
Transportation Fares	\$0.05	<1%	\$1,170,000
Estimated Total	\$146.23		\$3,597,520,000



¹Spending data are gathered via on-site surveys of nonresident travelers at airports, gas stations, and rest areas in MT.

²Data are collected quarterly. Therefore, avg. daily expenditures are weighted averages of quarterly figures. ³Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups. ⁴Expenditure category totals may not add to year total due to rounding.

Table 2 - 2015 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	\$2,969,290,000	\$992,870,000	\$931,430,000	\$4,893,590,000
Employment (# of jobs)	37,280	7,650	7,820	52,750
Employee Compensation	\$855,160,000	\$213,410,000	\$241,510,000	\$1,310,080,000
Proprietor Income	\$126,500,000	\$58,090,000	\$43,690,000	\$228,280,000
Other Property Type Income	\$321,990,000	\$182,270,000	\$177,990,000	\$682,250,000
State & Local Taxes	-	-	-	\$208,350,000*

Direct impacts result from nonresident traveler purchases of goods and services; **indirect impacts** result from purchases made by travel-related businesses; and **induced impacts** result from purchases by those employed in travel-related occupations.

Industry Output is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

* **CHANGE:** The IMPLAN data set now incorporates state-level BEA TOPI (taxes on production and imports) data, rather than using U.S. data to produce state-level estimates, as was done in previous IMPLAN data sets. Comparison to years prior to 2012 is not advised.

December, 2015 Kara Grau, M.S.

www.itrr.umt.edu

©2015 ITRR

2015 MONTANA NONRESIDENT SPENDING (PRELIMINARY)

- In 2015, nonresident visitors to Montana spent an estimated 3.6 billion in the State

INSTITUTE FOR TOURISM & RECREATION RESEARCH
UNIVERSITY OF MONTANA



SUMMARY

We're utilizing three partners to leverage their primary data to more holistically look at marketing from an analytical standpoint

- We're looking at what our target audience is looking for and wanting as well as their perceptions of MT marketing and the brand (Destination Analysts)
- Using data to see where people searching and booking Montana travel are located and how long it takes them – search to stay (nSight for Travel)
- Utilizing mobility data to see what campaigns are influencing people to come to Montana and from where (Arrivalist)

ONGOING & FUTURE WORK

EFFECTIVENESS & EFFICIENCY

- Look at how effective specific campaigns, media partners, and platforms are relative to their cost of creation and deployment
- Comparing markets to better maximize media spend
- Currently have an RFP out for the Montana brand as it relates to audience, awareness and competitiveness
 - Please contact Tia Snyder, Procurement Unit Supervisor with the State if you wish to discuss this RFP
 - E. tsnyder@mt.gov
 - P. 406-444-3315

QUESTIONS

Erin Francis-Cummings

President & CEO
Destination Analysts



Katrina Pruitt-Andrews

Vice President of Marketing
nSight for Travel



Cree Lawson

Founder & CEO
Arrivalist



Maclaren Latta

Vice President of Consumer Insights
MERCURYcsc



Joe Ramler

Senior Economist
Montana Department of Commerce

