



Why We Go The Direction We Do

Research Overview

Tourism Advisory Council
October 6, 2014

OUR BODY OF KNOWLEDGE

- Qualitative – fewer, deeper, insights
- Quantitative – larger, broader, measurement
- Secondary – cost-efficient

OUR BODY OF KNOWLEDGE

QUANTITATIVE

Original Geotourism Study (2002)

Consumer Value Targeting Study (2010)

Leisure Trends Group Studies (2009-Present)

ITRR Studies (Ongoing)

QUALITATIVE

Montana's Branding Process (2007-2008)

Geotraveler Studies (2008-2010)

Winter Brand Study (2011)

Think T+O™ Insights (Ongoing)

SECONDARY

Smith Travel Research (Ongoing)

State of the American Traveler (Ongoing)

U.S. Travel Association (Ongoing)

Think with Google, Skift, Etc. (Ongoing)

ORIGINAL GEOTOURISM STUDY (2002)

- Original study conducted by *National Geographic Traveler* and TIA (now USTA)
- Served as inspiration/insight for Montana at beginning stages of branding process
- Provided insightful quantitative info
 - Approx. 55 Million Americans
 - College degree+
 - Household Income: \$50K+
 - Age: 25-54
 - Family: 1/3 have children under 18
 - Geographically: Skews Western U.S

Geotourism:

The New Trend In Travel

Prepared by
Travel Industry Association of America



Sponsored by
National Geographic Traveler

NATIONAL  GEOGRAPHIC
TRAVELER

Source: Geotourism Study, National Geographic, 2002

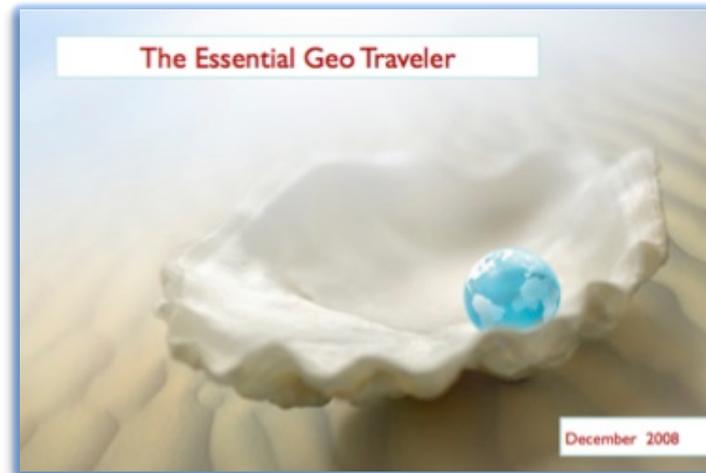
MT BRANDING PROCESS (2007-2008)

- Extensive process that matched the input from the target audience and the stakeholders to determine brand attributes
- Also created and tested brand pillars
- Resulted in brand books that included details about the Geotraveler



ESSENTIAL GEOTRAVELER (2008)

- Qualitative research conducted by Lex Sanford to better understand who Geotravelers are and why they travel



Source: The Essential Geotraveler, Lex Sanford, 2008

ESSENTIAL GEOTRAVELER (2008)

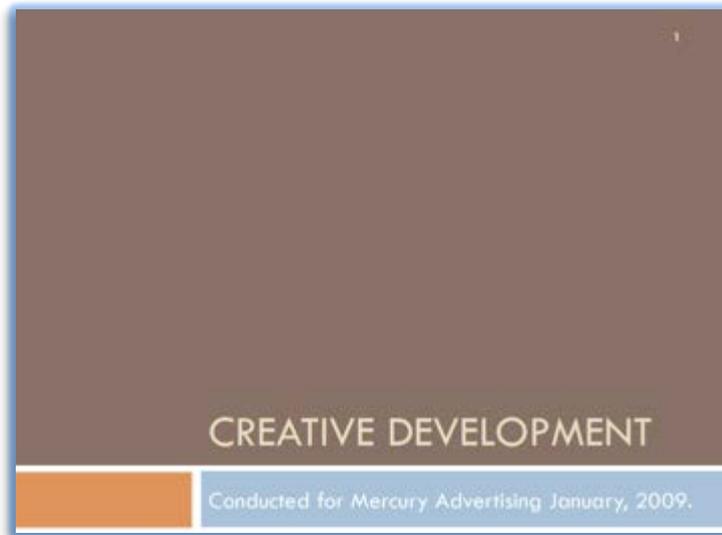
- Travel is not something they do; it's part of who they are
- Travel has three key components:
Authenticity, personal awakening and shared humanity

*"Travel should be a full-body experience –
we ought to observe and absorb the natural world, the culture, the language, the local arts – with
curiosity and respect."
– Liz, Geotraveler Panelist*

Source: The Essential Geotraveler, Lex Sanford, 2008

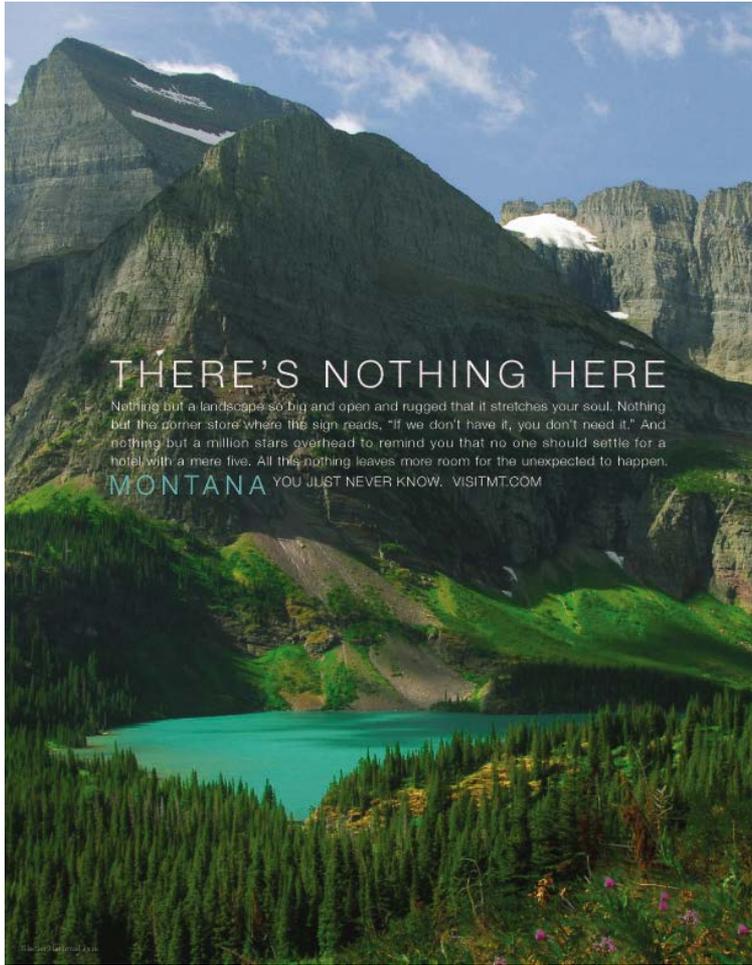
CREATIVE DEVELOPMENT (2009)

- Qualitative research conducted by Lex Sanford
- Explored "There's Nothing Here"



Source: Creative Development, Lex Sanford, 2009

CREATIVE DEVELOPMENT (2009)

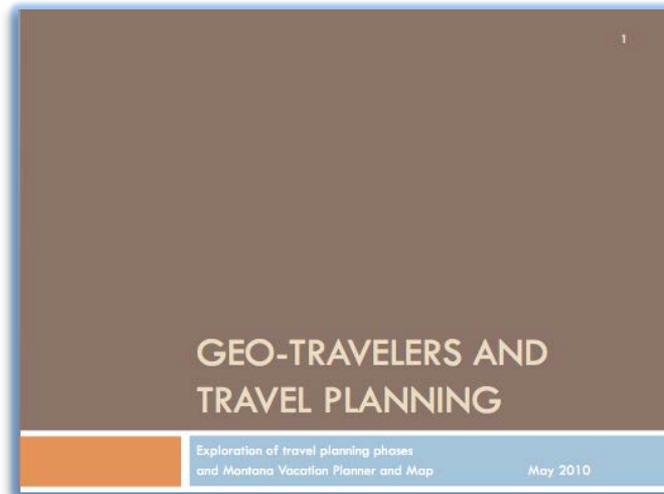


*"When you are faced with the decision to choose
between
an ad that speaks to the head
or one that speaks to the heart,
always choose the heart."
– Lex Sanford*

Source: Creative Development, Lex Sanford, 2009

TRAVEL PLANNING RESEARCH (2010)

- Qualitative research conducted by Lex Sanford to learn how Geotravelers plan travel and why they make the choices they do



Source: Geotravelers and Travel Planning, Lex Sanford, 2010

TRAVEL PLANNING RESEARCH (2010)

- Four (often overlapping) phases of travel planning:
Where to go; How to get there; Where to stay; What to do
- Geotravelers plan travel online
- Consider themselves travelers, not tourists
- Use technology to access local content
- Want to create one-of-a-kind experiences
- Website can provide more info; explain why they want to visit

"Printed material can become outdated quickly, whereas information on the web can be updated daily, even hourly."

– Kathleen, Geotraveler Panelist, Age 63

Source: Geotravelers and Travel Planning, Lex Sanford, 2010

CVT STUDY (2010)

- Quantitative study conducted by Spark to identify most valuable audience within the Geotraveler target
- Used to help guide and focus media spending



Source: The Nature of Travel, Geotraveler Consumer Value Targeting Study, Spark 2010

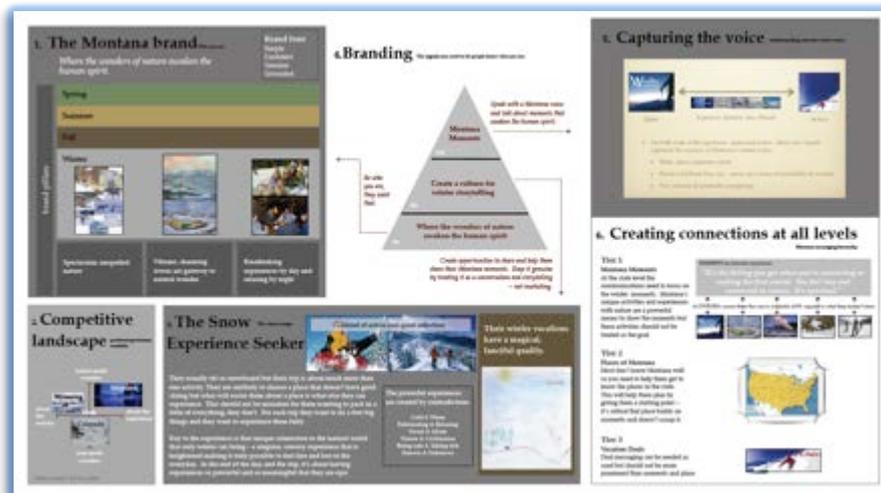
CVT STUDY (2010)

- Geot travelers have a natural curiosity and thirst for learning.
- The most coveted vacation experiences cater to a blend of needs: the thrill and chill; new and familiar; planned and spontaneous.
- Several travel decisions are made on the fly, once at the destination.
- Some activities are less spontaneous due to cost, prep requirement and need for know-how.

Source: The Nature of Travel, Geotraveler Consumer Value Targeting Study, Spark 2010

WINTER BRAND STUDY (2011)

- Qualitative research conducted by SenseTruth to explore the Winter Montana brand, target audience and competitive set
- Resulted in Winter brand book



Source: Winter Brand Study, SenseTruth 2011

WINTER BRAND STUDY (2011)

- Montana is a nature-made experience in winter
- Expanded target audience: the snow-experience seeker
- Connect on a sensory level through three tiers of messaging
- Different partners play different roles in messaging tiers but all partners need to work together
 - Inspiration
 - Orientation
 - Facilitation

Source: Winter Brand Study, SenseTruth 2011

LTG STUDIES (2009-PRESENT)

- Ongoing studies conducted by Leisure Trends Group for warm and winter season campaigns
- Brand awareness studies track awareness, consideration and perceptions of Montana as a destination
- Conversion studies provide insight into the impacts of the campaigns and ROI
- Evaluate studies over time and determine trends



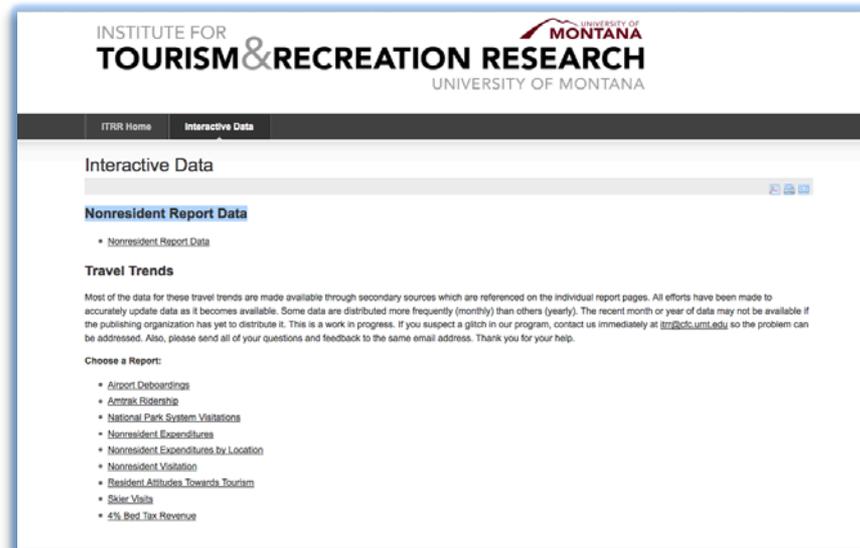
LTG STUDIES (2014 FINDINGS)

- 52% of Geotravelers use TripAdvisor to plan/research travel
 - 19% use travel blogs
 - 12% use YouTube
 - 11% use Fodors.com
- The top source of Montana info is friends/family (53%)
 - Advertising ranks second (26%); articles rank third (25%)
- Outdoor activities ranks #2 on what makes Geotravelers inclined to travel to Montana (24%)
 - 24% also are inclined because they “want to visit/on list”

Source: LTG, Brand Awareness, Wave 12, May 2014

ITRR STUDIES (ONGOING)

- Lots of great information: <http://www.itrr.umt.edu/>
- Sorted by topic: <http://www.itrr.umt.edu/reportTopic.htm>
- Custom report builder: <http://www.tourismresearchmt.org/>
 - Quarterly nonresident data
 - Travel trends data



ITRR STUDIES (2014 FINDINGS)

- 35% of nonresident visitors used a search engine to plan their travel
- 90% of nonresidents visitors brought wireless technology with them
- 77% of nonresident visitors used wireless technology for directions and maps while they were here

Source: ITRR, Nonresident Visitors, Q1-Q2, 2014

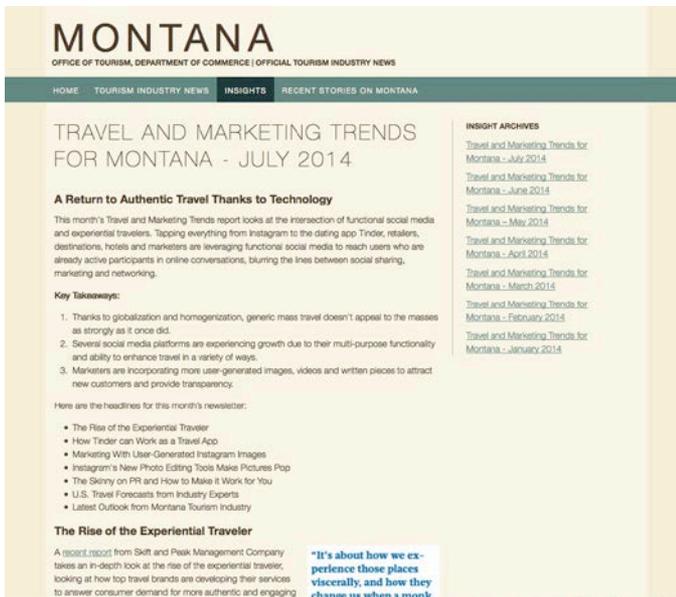
THINK T+O™ INSIGHTS (ONGOING)

- MercuryCSC's proprietary research panel
- 1,000 handpicked Geotravelers
- Provides ongoing insights
- Tapped for MTOT's FY15 creative development



SHARING SECONDARY SOURCES

Monthly Travel and Marketing Trends



- Timely and relevant information specific to travel and marketing
- Links to articles on trends and statistics to provide insights
- Emailed at beginning of month
- Sign up at montanatourismnews.org

"Outside recently published its set of "indispensable rules" that will change the way we think about travel."

– October Travel and Marketing Trends

HIGH-LEVEL ANALYSIS

Quarterly Cross-Agency Dashboard

Spark
MONTANA

Montana Cross-Agency Data Dashboard April-June 2014

Overview

-The purpose of the Montana Cross-Agency Data Dashboard is to provide a complete snapshot of what's happening within the Montana Office of Tourism, what are the key travel indicators and how consumer-facing marketing initiatives are impacting those numbers.

-This report is intended for key stakeholders as well as agency partners-offering both a look back and a look forward and providing ongoing insights to guide future marketing initiatives.

Key Takeaways from Q2 2014

-Increased consumer interest, engagement and visitation may be a result of an increase in Geotraveler-focused targeting. The Warm Season Key Market campaign and Digital Display advertising have demonstrated strong results thus far.

-The most recent studies from Leisure Trends Group also provide some good indications of the success of the previous warm season and most recent winter consumer marketing efforts.

-Unaided and aided advertising awareness of Montana (net) has risen significantly among Geotravelers since February 2009, an increase of 133% in unaided advertising awareness and a 100% increase in aided advertising awareness.

-39% of the Geotravelers who are aware of the advertising indicated that they are likely to travel to Montana in the next 18 months.

-Since February 2009, there has been a 43% increase in Geotravelers who have indicated that they have ever traveled to Montana.

- Snapshot of what's happening, key travel indicators and potential impact of marketing initiatives
- Looks at earned, owned and paid media metrics
- Includes secondary sources and visitation numbers
- Q2 2014 now posted at montanaturismnews.org

Q&A

THANK YOU