

MONTANA

DEFINING THE WINTER EXPERIENCE



TABLE OF CONTENTS

+ INTRODUCTION	2
+ RESEARCH SUMMARY	3
+ OUR WINTER TARGET	6
+ MONTANA BRAND PILLARS	8
+ MESSAGING	
+ CAPTURING THE VOICE	9
+ HOW DO WE COLLECTIVELY SUCCEED?	10
+ CREATIVE CHECKLIST	11-13

INTRODUCTION

In the spring of 2011, the Montana Office of Tourism, along with a team of winter constituents, conducted a qualitative research study to better define the Montana winter visitor—and ultimately, the messaging platform that resonates with them.

The findings indicated that Montana's existing brand pillars are very much in line with telling the winter story. The opportunity is to connect with our target **on a sensory level** to best engage them and better tell this winter story.

The following pages are a "road map," providing a snapshot of the research and a guide to help Montana's tourism partners and their marketing organizations execute branded communications conveying the Montana winter experience.



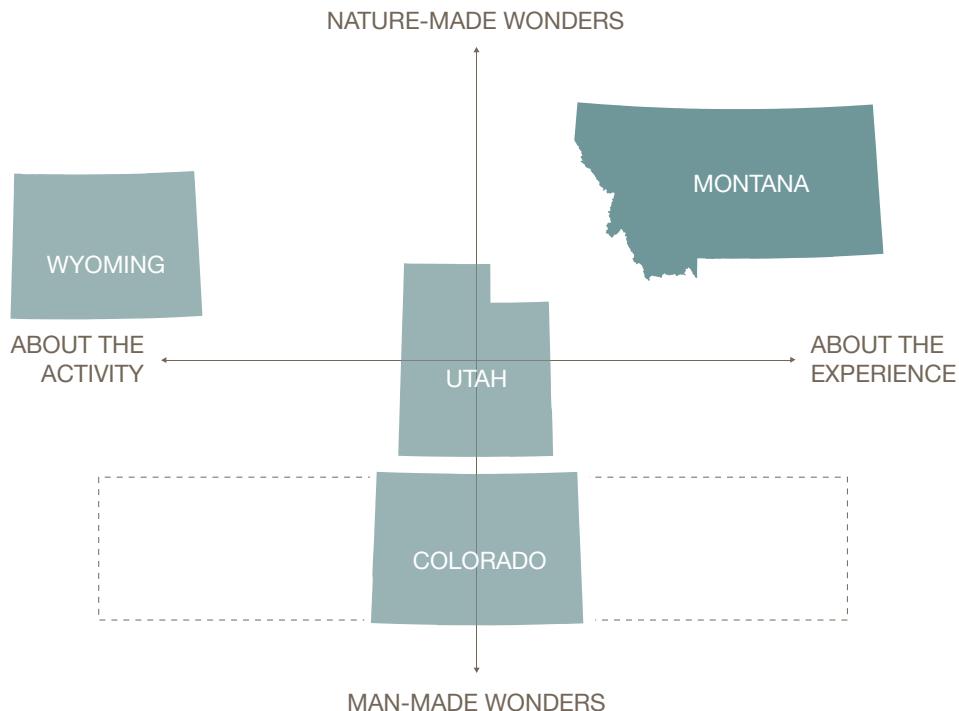
RESEARCH SUMMARY

The winter season in Montana provides a wide range of vacation opportunities for out-of-state visitors and locals alike—snow creates the context for their travel experience. Recent competitive, qualitative and focus group research tells us that people choose winter vacations for a variety of reasons, and the analysis of those insights will help us reach them more effectively. The following is an overview of why travelers choose winter destinations and what they expect to get out of their winter vacation.

COMPETITIVE LANDSCAPE

RESEARCH SUMMARY: WINTER TRAVELER EXPECTATIONS

The immediate competitive landscape includes Montana's neighbors of Idaho and Wyoming, as well as Utah and Colorado. Research shows that traveler expectations are largely categorized by four separate and contrasting messages: Nature-made wonders, man-made wonders, activity and experience. The map below shows where, according to prospective winter travelers, each state "lives." The goal is not to be in the center (or any other area for that matter). The goal is to understand the area of the map that you already own in the eyes of the consumer so that you can create marketing messages that align with and leverage these positive, existing consumer expectations.



NATURE-MADE WONDERS VS. MAN-MADE WONDERS

Nature-made wonders are those elements that occur *naturally*: majestic, glacially carved mountains, endless ranges and snowfields, icicles shimmering in the sunlight, national parks. Man-made wonders would be those created or developed, like shopping and ski area/resort attractions.

ABOUT THE ACTIVITY VS. THE EXPERIENCE

Winter activities can be described as the physical things one does: snowmobiling, skiing, shopping, etc., while the alternative being more about the experience itself—the emotions and senses triggered during the activity ultimately define the whole experience.

KEY TAKEAWAYS

- + Montana owns experiences created by nature-made wonders
- + Wyoming is more about activities within the natural wonders
- + Colorado's activities and experiences are defined by man-made wonders; Colorado dominates this space
- + Utah has a combination of all areas and does not dominate in any one area
- + Idaho does not currently register on the competitive landscape

IMPLICATION FOR MONTANA

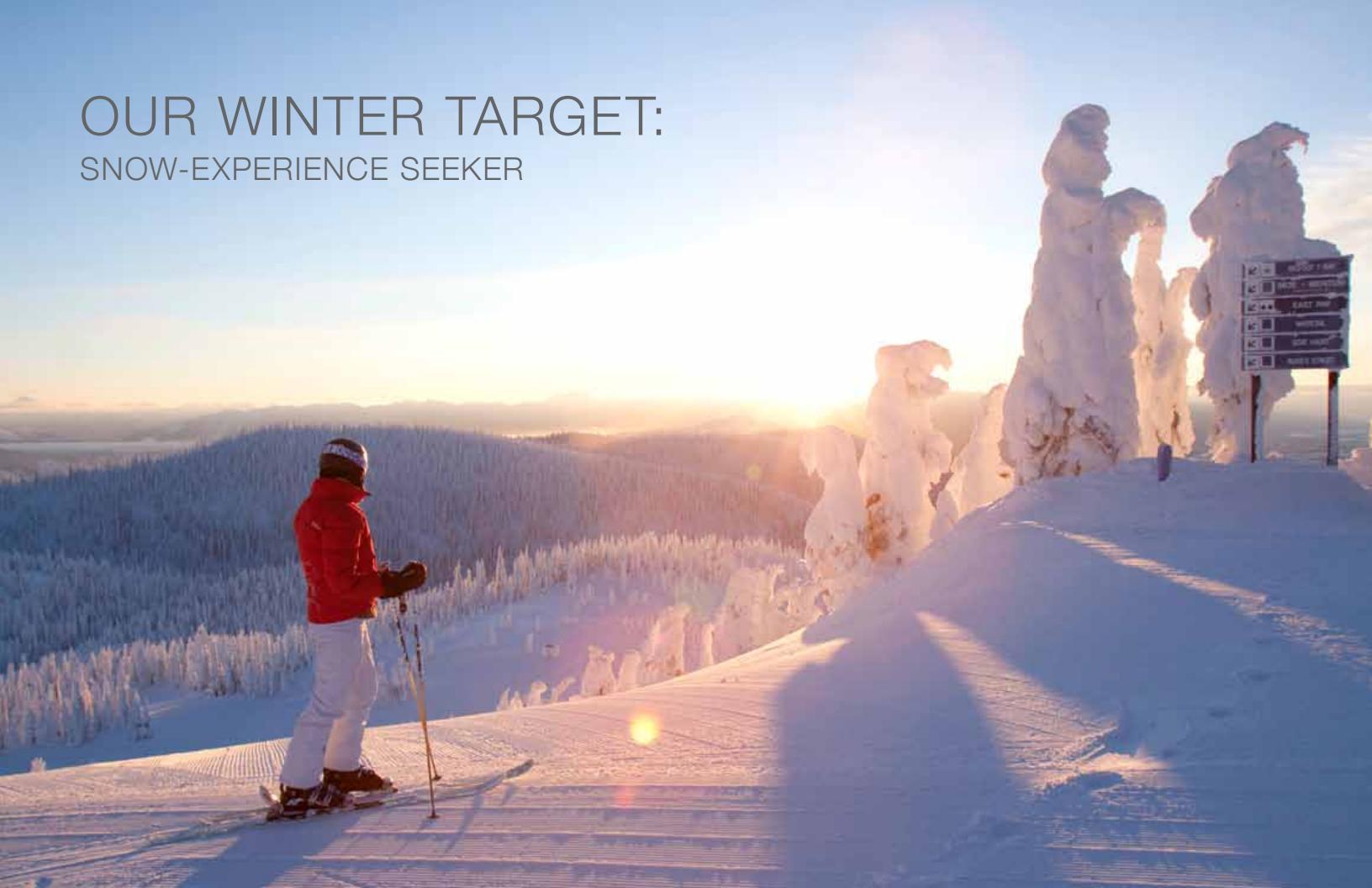
Take this opportunity to differentiate ourselves by *owning* our quadrant—nature-made wonders and the experiences within. Communicate the breadth and depth of the Montana winter experience on a sensory level to create that "Montana Moment".

COMPETITIVE LANDSCAPE

RESEARCH SUMMARY: WINTER TRAVELER EXPECTATIONS

STATE	MESSAGING	TRAVELER EXPECTATIONS	TARGET AUDIENCE EXPERIENCE
MT	<ul style="list-style-type: none"> + More spectacular unspoiled nature than anywhere else in the lower 48 + Vibrant and charming small towns that serve as gateways to our natural wonders + Breathtaking experiences by day and relaxing hospitality at night 	<ul style="list-style-type: none"> + Nature-made wonders in a vast landscape + Multiple unique and authentic winter experiences, with skiing as an anchor + Experiences within the untouched landscape lead to those reflective 'ahhh moments' which tap into all senses 	<p><i>"Big Sky, Montana in 2005—I went with my three best friends—skiing, snowmobiling, snowboarding and had a blast! In the evening we hung out in the lodge having a few drinks, talking, joking, and making new friends. It has big, wide open ski areas, gorgeous vistas, and relaxed my spirit."</i></p> <p style="text-align: right;">- Ron, 49, Dallas</p>
CO	<ul style="list-style-type: none"> + "Winter Wonderland" + Number one ski destination in North America; home to some of the largest resorts in the country + Individual resort messaging varies 	<ul style="list-style-type: none"> + Man-made wonders + Ski-focused vacation + Support activities that include shopping, dining, etc. + Higher-end resort amenities and pampering 	<p><i>"There's a concentration of ski resorts and variety of activities."</i></p> <p style="text-align: right;">- 2011 Winter Research Participant</p>
UT	<ul style="list-style-type: none"> + "The greatest snow on earth" + Fourteen world-class resorts; eleven within one hour from Salt Lake City + Individual resort messaging varies 	<ul style="list-style-type: none"> + Man-made wonders + Nature-made wonders + Activities and experiences that support a family-friendly vacation 	<p><i>"It seems to be the more family-friendly version of Colorado."</i></p> <p style="text-align: right;">- 2011 Winter Research Participant</p>
WY	<ul style="list-style-type: none"> + "Forever West" + Wyoming owns the western message + Ski messaging is Jackson Hole-centric 	<ul style="list-style-type: none"> + Natural experience; wildlife and open space + Skiing-focused due to prominence of Jackson Hole + Activities often have an underlying western tone 	<p><i>"It's not an obvious place to consider unless you know Jackson Hole."</i></p> <p style="text-align: right;">- 2011 Winter Research Participant</p>
ID	<ul style="list-style-type: none"> + "Adventures in Living" + "Winter is Hot" + Disconnected messaging around winter activities 	<ul style="list-style-type: none"> + Consumers don't have a clear idea of what Idaho has to offer + Not an obvious destination for a winter vacation 	<p><i>Not registering on the competitive landscape.</i></p>

OUR WINTER TARGET: SNOW-EXPERIENCE SEEKER



SNOW-EXPERIENCE SEEKER

They usually ski or snowboard but their trip is about much more than one activity. They are unlikely to choose a place that doesn't have good skiing but what will excite them about a place is what else they can experience. This should not be mistaken for them wanting to pack in a little of everything, they don't. For each trip they want to do a few big things and they want to experience them fully.

DEMOGRAPHICS

- + Age: 25-54
- + HHI: \$60K-\$75K or more
- + Bachelor's degree or higher
- + Has taken 2+ domestic vacations in the past 12 months and was active on these trips
- + Many ski more than once a month on average

CHARACTERISTICS

- + Seeks balance between action and reflection
- + Motivated by skiing—keep in mind skiing is only one of many activities they enjoy (e.g., wildlife viewing, snowshoeing, dog sledding, history, culture, cross-country skiing, etc.)
- + Wants to do multiple activities and experience them fully
- + Feels a unique connection to the natural world that only snow and winter can bring
- + Seeks the authenticity of people and places

NOTE: This audience is comprised of the Geotraveler and the Ski/Winter Enthusiast audiences, broadening the base target. Targets were derived from MRI data and qualitative research conducted on behalf of the Montana Office of Tourism.

For more information, visit <http://travelmontana.mt.gov/branding/>

OUR WINTER TARGET:

The Snow-Experience Seeker's sensory relationship to the winter experience in their own words



"It's about a limitless journey, new opportunities. It's a new day, a time of reflection that takes you away from everyday life. It's whatever you want to make of a day."

—Wendy, 45, Minnesota



"I love the snow. It's all about adventure, getting out there—skiing, playing, building snowmen."

—2011 Winter Research Participant



"It's different moments in the same trip—getting up early, taking the chairlift up to the top and soaking in the view, the quiet exhilaration and knowing it's going to be an awesome day. And that leads to an epic day."

—Heather, 34, Chicago

"I love the holiday season—the smell of snow falling, walking or hiking in the crisp clean air."

—Allan, 52, Canada

"It reminds me of the end of day sitting by the fire with a nice glass of wine."

—Stan, 47, Canada

THE MONTANA BRAND PILLARS:

THE BASIS OF SHARING THE WINTER EXPERIENCE



BRAND PILLAR #1: MORE SPECTACULAR UNSPOILED NATURE THAN ANYWHERE ELSE IN THE LOWER 48.

THE DIFFERENTIATOR:

Of the three, this is the pillar that distinguishes Montana from our competitors—particularly when we “iconify” some of our most outstanding examples and leverage powerful associations (Yellowstone National Park, large peaks and their ski areas, wildlife in winter settings, etc.).



BRAND PILLAR #2: VIBRANT AND CHARMING SMALL TOWNS THAT SERVE AS GATEWAYS TO OUR NATURAL WONDERS.

THE MITIGATOR:

It mitigates people’s perception of Montana being remote without denying it. It further shifts the focus from the destination being the town itself, to the town being a gateway to our natural wonders.



BRAND PILLAR #3: BREATHTAKING EXPERIENCES BY DAY AND RELAXING HOSPITALITY AT NIGHT.

THE BRAND BUILDER:

It leverages our strengths (nature and scenery) to drive up the qualities the audience desires (comfort and exhilaration). And remember, depending on the person, exhilaration is just as easily achieved during a snowcoach tour of Yellowstone as it is descending one of our majestic peaks.

"IT'S THE FEELING YOU GET WHEN YOU'RE SUMMITING OR MAKING THE FIRST ASCENT. YOU FEEL TINY AND CONNECTED TO NATURE. IT'S SPIRITUAL."



MESSAGING: CAPTURING THE VOICE

The essence of the Montana winter voice is created by sensory contradiction. Most importantly, snow creates the context for these contradictions.

Powerful moments and experiences are how sensory contradictions are created:

- + Cold & Warm
- + Social & Alone
- + Being safe & Taking risks
- + Exhilarating & Relaxing
- + Nature & Civilization
- + Known & Unknown

The summation of each day's events creates a much bigger, whole experience:

- + Morning silence/solitude = Reflection
- + The day's activities = Exhilaration
- + Evening gatherings = Connection
- + Note: This can be achieved by representing the senses/emotions: visually with images, within the copy, with sound via radio, etc.

To best communicate and capture the winter voice, focus on one sensory experience per execution: sight, touch, taste, smell, sound. A complete campaign may contain multiple sensory experiences as executions dictate.

MESSAGING:

HOW DO WE COLLECTIVELY SUCCEED?

We will collectively succeed by creating connections at all levels. Review the tier chart below to see where you fit within this effort. While reviewing, keep sensory messaging in mind at all levels—Montana winter experiences are very much about how the senses are affected. In return, these sensory connections tend to create the desire for people to want to share their experiences. So, if it makes sense or works with your campaign, you can provide a platform for storytelling, such as Facebook or blogging, where those stories can be told.

It is important that the tiers work together. The Montana Office of Tourism creates interest and adds value to the regional/town level. Businesses and resorts further support the regions and town's message and closes the deal.

	MESSAGE	IMAGERY	CALL TO ACTION
TIER 1: STATE LEVEL Montana Moments	<ul style="list-style-type: none"> + Focus on emotive winter moments in spectacular unspoiled scenery + Take a general approach to offerings (landmarks, activities, scenic destinations, etc.) + Share overall uniqueness of what Montana is in the winter season + Use contrast and contradiction to connect and emotionally engage consumer 	<ul style="list-style-type: none"> + Natural Wonders: <ul style="list-style-type: none"> + Majestic, glacially carved mountains + Endless ranges and snowfields + Icicles shimmering in the sunlight + National parks + Person reflecting within landscape + Winter activities such as skiing, snowshoeing, cross-country skiing, etc. (gives access to the “moment”) + Wildlife 	<ul style="list-style-type: none"> + Should prompt initial planning such as ‘Go to WinterMT.com to begin your winter travel experience’
TIER 2: REGIONAL/TOWN LEVEL Places of Montana	<ul style="list-style-type: none"> + Feature activities anchored to location or natural wonders + Introduce traveler to the “place” in Montana; give them a starting point + Provide a more specific sense of place, character, scenery and opportunity + Point to the otherwise unknown places 	<ul style="list-style-type: none"> + Charming small towns + Activities unique to area (skiing, snowcoach, snowshoeing, cross-country skiing, etc.) + Gateway to natural wonders 	<ul style="list-style-type: none"> + Use regional or CVB URLs and contact information to enable more detailed travel research, including location, offerings, and opportunities
TIER 3: BUSINESS/RESORT LEVEL Moments and Place (and vacation deals, as appropriate)	<ul style="list-style-type: none"> + Actionable information that can be acted on immediately, such as lodging deals, price point packages, and ski and stay deals + May also include destination or resort-level differentiators, such as amenities, access, etc. 	<ul style="list-style-type: none"> + Exhilarating experiences + Activities within vast landscape + Indoor/outdoor lodging + Unique local opportunities 	<ul style="list-style-type: none"> + Book now + Website address + Phone number + Reservation page

TIER 1: STATE LEVEL EXAMPLE

MONTANA MOMENTS

At the state level, the communications need to focus on the winter moments. Montana's unique activities and experiences with nature are a powerful means to show the moments, but these activities should not be treated as the goal.

MESSAGING CHECKLIST

- + Does the image showcase Montana's spectacular/unspoiled landscape in winter?
- + Does the copy emphasize the overall uniqueness of what Montana is in the winter season?
- + Does the message create a space in which emotive, sensory experiences can take place? Can you imagine yourself there? Is it attainable?
- + Does your creative support the messages being put out by those in tiers 2 and 3? Is your media buy paired with other Montana travel messages?
- + Is the call to action clear and focused?

Creative execution is currently in development, but will maintain the following features:

- + The image and copy work in tandem to showcase unique activities and experiences
 - + The copy speaks to the contradiction of 'active' and 'quiet'
 - + Image showcases spectacular/unspoiled landscape in winter; person within; activity as appropriate
- + Overall, the execution showcases contradiction and highlights the overall uniqueness of what Montana is in the winter time to appeal to the target on a sensory level

TIER 2: REGIONAL/TOWN LEVEL

PLACES OF MONTANA

Most don't know Montana well, so help them get to know the places in the state. This will help them plan by giving them a starting point—it's critical that place builds on moments and doesn't usurp it.

MESSAGING CHECKLIST

- + Does the image showcase activities unique to the area/natural wonder? Does it anchor to a geographical location?
- + Does the copy emphasize the unique winter character of the location or opportunity?
- + Does the message create a space in which emotive, sensory experiences can take place? Can you imagine yourself there? Is it attainable?
- + Does your creative support the messages being put out by those in tiers 1 and 3? Is your media buy paired with other Montana travel messages?
- + Is the call to action clear and focused?

To be updated with partner creative to show best practices around having the following features:

- + The image showcases an area-specific activity
- + The copy speaks to the uniqueness of that location and/or activity
- + The copy speaks to the uniqueness of the location and activity; includes contact information
- + Overall message showcases a unique regional aspect of winter in Montana, again appealing to the target on a sensory level

TIER 3: BUSINESS/RESORT LEVEL

MOMENTS AND PLACE (AND VACATION DEALS, AS APPROPRIATE)

Deal messaging can be used as needed, but should not be more prominent than moments and place.

MESSAGING CHECKLIST

- + Does the image showcase exhilarating experience/activities within the vast landscape?
- + Does the copy speak to a deal, offer, promotion or unique destination differentiator?
- + Does the message create a space in which emotive, sensory experiences can take place? Can you imagine yourself there? Is it attainable?
- + Does your creative support the messages being put out by those in tiers 1 and 2? Is your media buy paired with other Montana travel messages?
- + Is the call to action clear and focused?

To be updated with partner creative to show best practices around having the following features:

- + Emotive imagery showcases the activity within context and provides an attainable sense of place
- + Copy speaks to unique features and opportunities of destination/location
- + Strong call to action with an offer as applicable; includes contact information
- + Overall message is actionable and lets the target imagine he/she is there, again appealing to the senses

To learn more about the Montana brand and how it can be implemented throughout your winter marketing efforts, contact the Montana Office of Tourism at 1.406.841.2870 or visit travelmontana.mt.gov/branding.

For more information on the Montana Office of Tourism's winter marketing efforts, including cooperative advertising opportunities, please visit www.travelmontana.mt.gov/consumermarketing

ACKNOWLEDGEMENTS

The staff at the Montana Office of Tourism and the Department of Commerce wish to thank the following tourism partners for their input and guidance in this project:

DANNY BIERSCHWALE, Yellowstone Association

JEFF CARROLL, Red Lodge Mountain Resort

RHONDA FITZGERALD, Montana Tourism Advisory Council

RACENE FRIEDE, Glacier Country Regional Tourism Commission

BEN HAUGAN, Showdown Ski Area

MARNE HAYES, Big Sky Chamber of Commerce

BILL MCGLADDERY, Montana Tourism Advisory Council

WILL MOSS, Lost Trail Powder Mountain

MEG O'LEARY, Big Sky Resort, Montana Tourism Advisory Council

CICHE PITCHER, Discovery Ski Area

NICK POLUMBUS, Whitefish Mountain Resort

KEN SINAY, Yellowstone Safari Company

JESSI SPENCER, Blacktail Mountain

JAN STODDARD, West Yellowstone Convention & Visitors Bureau

DOUG WALES, Bridger Bowl

