Grant Details
95522 - FY21 Region/CV8 Marketing Plan

101298 - FY21 Yellowstone Country Marketing Plan

DDC Office of Tourism

Grant Title: FY21 Yellowstone Country Marketing Plan
Grant Number: 21-51-010
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Applicant Organization: Yellowstone Country Montana, Inc.
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Community & Brand Support

Describe your destination (who you are, who you wish to attract and why you believe they would come) addressing your strengths, opportunities, and potential challenges. How does your destination align with Montana's brand pillars?

COVID-19 STATEMENT

Due to the COVID-19 Pandemic, Yellowstone Country is prepared to face savers budget reductions for FY 21 (and possibly beyond). It is our intention to make strategic changes as needed based on a number of factors: amount of funds available (cashflow), which marketing endeavors we feel are of highest value (ROI), the flexibility of the marketing method, and the actual required reductions based on collections.

Please see attached alternate budget scenarios at a 25% and 35% decrease; these budget show where we would make the reductions as warranted. NOTE: Yellowstone Country is prepared to decrease the budget at even greater percentages; in the event of a 40% or greater budget cut, we would substantially reduce and/or eliminate Print Advertising, Photo/VIDEO Library, Website Updates & Developments, our Cultural Tourism grant program, Press Promotions/Media Outreach and Press/Influencer trips.

As we begin the recovery phase, we will be prioritizing regional & drive market promotion, as well as in-state travel from one region to another. As travel increases, we would look to shift some focus to the remaining geographic, psychographic, demographic & niche markets. It is likely we would “pause” our planned promotion for New & Emerging Markets until deemed appropriate based on budget, data, etc.

In the unlikely event YC has more marketing funds available than expected, we have identified Digital and Social Media Advertising as the budgets we would increase. In the event we have to reduce the FY 21 budget, we would reduce/eliminate Print Advertising because of the cost factor and inability to track performance in an up-to-the-minute capacity. Additionally, if necessary, we would reduce our Social Media Influencer/Press trip and Media Outreach budgets for the same reasons.

PURPOSE: The sole purpose of Yellowstone Country Montana, Inc. (YC, YCM) is to promote the five-county region (Gallatin, Park, Sweet Grass, Stillwater and Carbon) of Montana as a year-round destination for leisure & business travelers.

Yellowstone Country Differentiator: The “Beyond Yellowstone” experience that can be found throughout the YC region; the primary reason people come to Montana is to visit Yellowstone National Park; however, once (or in addition to) they experience the park, the region offers the opportunity to “get away from your getaway by heading north of the park”. Visiting the world’s most famous national park is a must for many people, but Yellowstone Country’s purpose & mission is to broaden the experience to encompass what can be found in Montana’s south-central region bordering the park.

STRENGTHS

Yellowstone Country’s core strengths include its main scenic attractions—Yellowstone National Park and the Beartooth All-American Road—as well as countless cultural and recreational opportunities.

- Yellowstone National Park and its Gateway Communities: Three of the five entrances to YNP are located in YC, including the only year-round entrance at Gardiner, the northeast entrance at Cooke City/Silver Gate and the most-accessed entrance at West Yellowstone.
- Scenic Drives: Paradise Valley (Livingston to Gardiner), the Beartooth All-American Road (Red Lodge to Cooke City), Gallatin Canyon (Bozeman to Big Sky), Lake Loop (Bozeman to Norris), Absarokee Loop (Absarokee to Nye to Fish Tail and back to Absarokee), and many, many other routes through Yellowstone National Park.
- Alpine Ski Resorts: Bridger Bowl, Big Sky and Red Lodge Mountain are three of the top ski resorts in the state.
- World-Renowned Snowmobile Areas: Cooke City, West Yellowstone, Crazy Mountains area, Gallatin River Corridor.
- Nordic Skiing: Nordic Centers and many miles of groomed trails throughout the region.
- Culture and History: From Native Americans and dinosaurs to mining, ranching and mountain men, the region offers a very interesting and unique blend of history and culture. The Lewis & Clark Trail runs through the region from Three Forks to Park City, and the historically significant Bozeman Trail covered much of the area. Yellowstone Country is a partner in the statewide Montana Dinosaur Trail, with Museum of the Rockies being an anchor facility. Tygart Rise is a world-class sculpture & music venue. Lifestyle Culture: Western way of life that includes rodeos, working & guest ranch experiences. Foodies and brewery/distillery aficionados will find the area a “hot bed” of great venues to satisfy them. Although the YC region does not have a reservation, many of the Native American tribes were in the area, with the original Crow Agency site, Madison Buffalo Jump & Headquarters of the Missouri all holding significant cultural & historical value for Indian Country.
- Annual Events: Local festivals & events such as the uniquely Montana Reed Point Sheep Drive abound; farmers markets, fairs, community rodeos, Independence Day celebrations and countless other events, including long-running events. For winter enthusiasts, there are several unique winter events such as KidsnSnow, ski-joring & winter carnivals.
- Outdoor Recreation: The region abounds with outdoor recreation opportunities—Alpine & Nordic skiing, snowmobiling, wildlife viewing (in and around Yellowstone National Park), water recreation (fishing, boating, rafting, kayaking, swimming), ice climbing, hiking, snowshoeing & soaking in one of the region’s hot springs.
- Destination Lodging and Meeting Facilities: Several communities in the region have properties and facilities that can accommodate small to mid-size meetings and conventions. Bozeman and Big Sky also have full-service entities with the capacity to host larger groups.
- Bozeman Yellowstone International Airport: As the busiest airport in the state, BZN offers the most direct flights and easy access to the entire region.
- Open Land: Yellowstone Country features public access to BLM lands, Forest Service land and national parks, all just a short distance from any point in the region.
- Four Montana State Parks provides recreation and culture/history: Cooney Reservoir is a premier outdoor/water recreation venue, and Missouri River Headwaters and Madison Buffalo Jump state parks are well known for both outdoor recreation and culture/history. GreyCIF Prairie Dog Town State Park is unique and fun for family recreation. There are also camping and RV options located at or nearby the parks.

CHALLENGES/OPPORTUNITIES

- The Montana Dinosaur Trail: Paradise Valley (Livingston to Gardiner), the Beartooth All-American Road.
- Montana Reed Point Sheep Drive: Three of the five entrances to YNP are located in YC, including the only year-round entrance at Gardiner.
- Yellowstone National Park: Gallatin River Corridor.
- Nordic Skiing: Bridger Bowl, Big Sky and Red Lodge Mountain.
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- Bozeman Yellowstone International Airport: As the busiest airport in the state, BZN offers the most direct flights and easy access to the entire region.
- Open Land: Yellowstone Country features public access to BLM lands, Forest Service land and national parks, all just a short distance from any point in the region.
- Four Montana State Parks provides recreation and culture/history.
Visiting the world's most famous national park is a must for many people, but Yellowstone Country's purpose & mission is to broaden the experience to encompass what can be found in Montana's south-central region bordering the park. Yellowstone Country Differentiator: Taking time to take in the surroundings. The region has a multitude of art galleries, nature centers, museums and historical sites. Local attractions, festivals and events offer unique opportunities for visitors to immerse themselves in community culture, whether it's attending a rodeo, taking in a lively music festival, participating in and/or watching an exciting winter ski or snowmobile event or just spending a weekend or more exploring the great outdoors by hiking, mountain biking, snowmobiling or even dog-sledding. Yellowstone Country aligns effortlessly with Montana's Brand Pillars. There is an abundance of spectacular, unspoiled nature. Given the unique and diverse geographic and topographical features, the region provides an inviting environment for recreation and adventure, from population centers, so, one can be in any community in the region and truthfully say they are "surrounded by spectacular, unspoiled nature." YC is one region in the state that presents visitors both spectacular mountain views with panoramic valleys and sweeping, wide open plains just a short distance apart. Prior to YNP: Relaxing Hospitality at Night - As the Montana region that borders Yellowstone—America’s first national park—there's something for both the adventurous and those who prefer the quiet side of the outdoors. Whether that includes hitting the ski slopes and trails, soaking in natural hot springs, camping in any season (and in any style of lodging), or exploring the great outdoors by hiking, mountain biking, snowmobiling or even dog-sledding, Yellowstone Country has it all. The region has a multitude of art galleries, nature centers, museums and historical sites. Local attractions, festivals and events offer unique opportunities for visitors to immerse themselves in community culture, whether it's attending a rodeo, taking in a lively music festival, participating in and/or watching an exciting winter ski or snowmobile event or just spending a weekend or more exploring the great outdoors by hiking, mountain biking, snowmobiling or even dog-sledding. Yellowstone Country aligns effortlessly with Montana's Brand Pillars. There is an abundance of spectacular, unspoiled nature. Given the unique and diverse geographic and topographical features, the region provides an inviting environment for recreation and adventure, from population centers, so, one can be in any community in the region and truthfully say they are "surrounded by spectacular, unspoiled nature." YC is one region in the state that presents visitors both spectacular mountain views with panoramic valleys and sweeping, wide open plains just a short distance apart.

Potential Social Media opportunities under consideration for FY 21 include:

- Efficiency and ROI.
- Working with our local CVB's, Chambers of Commerce, and board members, we have cultivated a content calendar for our blog to provide consistent and current content, giving followers an authentic feel for our area.

Marketing Campaigns and Partner Support: Two points the team has considered when developing campaigns and partner support are audience segmentation and content strategy. Audience segmentation is an important aspect of creating effective marketing campaigns and partner support. By understanding the target audience and their needs, the team can tailor their approach to better resonate with the intended demographic. Content strategy involves developing engaging and relevant content that aligns with the audience's interests and preferences. Direct marketing campaigns and each of the associated marketing tools/resources (website, social media platforms, travel planner and scenic map, etc.) are all highly integrated, providing the right information at the right time during the inspiration, orientation and facilitation phases of trip planning.

INSPIRATION

Marketing Campaign messaging and imagery are specifically designed to address the Inspiration phase to targeted audience segments. This messaging inspires visitors and potential visitors to visit the region, whether it's attending a rodeo, taking in a lively music festival, participating in and/or watching an exciting winter ski or snowmobile event or just spending a weekend or more exploring the great outdoors by hiking, mountain biking, snowmobiling or even dog-sledding. Yellowstone Country aligns effortlessly with Montana's Brand Pillars. There is an abundance of spectacular, unspoiled nature. Given the unique and diverse geographic and topographical features, the region provides an inviting environment for recreation and adventure, from population centers, so, one can be in any community in the region and truthfully say they are "surrounded by spectacular, unspoiled nature." YC is one region in the state that presents visitors both spectacular mountain views with panoramic valleys and sweeping, wide open plains just a short distance apart.

Yellowstone Country Differentiator: The "Beyond Yellowstone" experience that can be found throughout the YC region, the primary reason people come to Montana is to visit Yellowstone National Park; however, once (or in addition to) they experience the park, the region offers the opportunity to "get away from your gateway by heading north of the park." Yellowstone Country is the outdoor gateway to Yellowstone National Park.

Describe your destination.

The Yellowstone Country website, call center, travel guide and scenic road map are the primary resources for helping travelers with the orientation and facilitation phases, as well as have functions during the inspiration phase as well. These innovative resources are designed to make the travel planning process as easy and efficient as possible. The websites provide a seamless experience for visitors, providing an itinerary builder to facilitate planning while simultaneously gathering information to help target future communications to users' interests.

The website provides an interactive calendar that links to our social media platforms, as well as a calendar of events that visitors can use to plan their trip.

The travel guide provides in-depth information on the entire region, spanning seasons, activities and events.

The scenic road map helps draw people from Yellowstone National Park into the surrounding areas, offering many possibilities for scenic drives in the region.

In addition, Yellowstone Country participates in national press events in key markets, providing a unique opportunity for exposure and orientation. Targeted marketing campaigns in these markets, aligning with press events, encourage additional and continued conversation. Branded promotional items provide an opportunity to leave top-of-mind presence with attendees.

Finally, YC funds Visitor Information Centers throughout the region. VICs provide an opportunity for staff, who are ostensibly local brand ambassadors, to engage visitors during all three phases, helping to create positive visitor experiences.

Optional: Include attachments here

BUDGET FY21 25.35% decrease scenarios 4-20.xlsx

1. Define your target markets (demographic, geographic and psychographic).

2. Define your target markets (demographic, geographic and psychographic).
TARGET MARKETS

In FY 21, primary geographic markets include:
Pennsylvania (Philadelphia)
California (Los Angeles, San Diego, San Francisco, Orange County)
Illinois (Chicago)
Oregon (Portland)
Colorado (Denver)
Texas (Dallas/Fort Worth, Houston)
Georgia (Atlanta)
Minnesota (Minneapolis/St. Paul)
Washington (Seattle)
Utah (Salt Lake City)
Massachusetts (Boston)
New York (New York)

These markets were identified based on FY20 inquiries (including website inquiries, live chats and incoming calls) as well as VisaVue data.

In FY 21, secondary geographic markets include:
Saskatchewan, Canada
Alberta, Canada
British Columbia, Canada

These markets were identified based on FY20 inquiries (including website inquiries, live chats and incoming calls) as well as VisaVue data.

Due to COVID-19, our focus will be domestic travel, so we would only implement advertising in the secondary markets if the budget did not have the expected decreases.

Key Demographic Markets for Yellowstone Country:

City dwellers (i.e., not rural, not suburban)
Affluent with a household income over $80K
Well-educated
Affluent with children

These characteristics were identified based on Destination Analytics reporting.

Key Psychographic Markets for Yellowstone Country:

Social Class - middle to upper class (in terms of disposable income)
Lifestyle - active, outdoor-recreation oriented, frequent travelers
Opinions - interested, but primarily influenced by desire to experience things for themselves
Activities and Interests - outdoor activities, history and culture, food/drink
Attitudes and Behaviors - environmentally conscious, adventurous spirits, like nature

Technology-savvy - using mobile devices in all stages of planning and travel

Families – Family travel

These characteristics were identified based on Destination Analytics reporting.

What are your emerging markets?

NICHE MARKETS

In-State Residents

If budget allows, we will create in-state “staycation” campaigns for Montanans, promoting the spring and fall shoulder seasons. Messaging will encourage locals to take advantage of Montana’s beauty and adventure, all while escaping the crowds of peak seasons. FY19 and FY20 included specific digital advertising campaigns for in-state travelers. Should budget allow, we will look at including continued in-state travel outreach in FY21.

Due to COVID-19, marketing to our in-state travelers will take on a higher priority than in years past. Top industry research companies such as Destination Analysts, Adara and the US Travel Association are all pointing to drive markets as being the travel segment that is most likely to return first. In the weekly research summary the week of May 18, DA showed that research respondents indicated they would take a driving trip for 2-5 days & would travel distances of up to 400 miles. This points to Montanians residing in the state as a key target market for us in the wake of COVID-19, since travelers coming from other regions of MT to Yellowstone Country would likely be traveling within that distance parameter.

The focus of our marketing efforts to both in state and regional drive markets (MT, the Dakotas, UT, WY, WA, etc.) will be to promote outdoor tourism in conjunction with the hospitality component; there is a significant opportunity to push the message that we have uncrowded (i.e. relatively SAFE) places to recreate and experience what the region has to offer.

A subset of the in-state audience is visiting friends and family members. This group is less likely to require the full spectrum of tourist services (i.e., hotels and restaurants), but very likely to show interest in experiencing Yellowstone Country. Family members visiting students at MSU and UM are a special segment to consider in this group.

Western Ski Audiences

Direct marketing to skiers who frequent western ski resorts (i.e., Colorado and Utah), in addition to a continued presence in Dallas, Chicago, Atlanta and San Diego, promoting YC’s accessibility and adventure. FY17, FY18, FY19 and FY20 all included heavy print, digital, social media and video campaigns aimed at western ski audiences. FY21 will include that as well, including more video creation and itinerary building on the Yellowstone Country website.

Targeting domestic tourism via partnerships with the Glaciers to Geysers joint venture with Glacier Country. The Montana Tourism promotion of this project included continued promotion to this audience.

Motorcyclists

Motorcyclists are a growing niche market who provide ample opportunities for targeted messaging within the region, and potentially in partnerships with neighboring regions. Opportunities include itineraries and maps featuring unique and appealing roadways, targeted media buys and a combination of in-state (drive) and out-of-state (fly-drive) messages. FY19 included the creation of anomobile-specific targeting with the Glaciers to Geysers joint venture with Glacier Country. FY20 included videography and photography specific to motocycling to be used in future campaigns, while the Glaciers to Geysers project included continued promotion to this audience.

Snowmobilers

Snowmobiling continues to expand in popularity and attract new audiences. Between guided trips and the option to go self-guided on your own, there’s something for everyone. Snowmobiling campaigns could be focused within the region, or potentially in partnership with other regions. Similar to the motorcycle audience, snowmobiling campaigns could include itineraries, maps, targeted media buys and a combination of in-state (drive) and out-of-state (fly-drive) messages. FY19 included the creation of snowmobile-specific targeting with the Glaciers to Geysers joint venture with Glacier Country. FY20 included videography and photography specific to snowmobiling to be used in future campaigns, while the Glaciers to Geysers project included continued promotion to this audience.

Birding Enthusiasts

Birding has become a valuable niche activity, and there are plenty of locations within the region, and in neighboring regions, that continue to draw this group. One potential way to capture this audience would be to create a map of birding locations, such as the Missouri Headwaters (Bozeman) and events such as Bridger Bowl’s Raptor Festival in October. Detailed information could be provided by break-out maps of specific locations within the larger map. This could be accomplished within the region, or with partner regions, ideally expanding to a state-wide birding map over time. FY20 included the updating of our birding-specific information on our website. Should budget allow, FY21 would include looking at other options for promotion to this audience.

Military Families

Military families and bases present a unique niche marketing opportunity as well. Due to the nature of their work, military families often travel at various times throughout the year (not necessarily restricted to standard summer and winter trips), and tend to take longer vacations in comparison to civilian families. In addition, bases often provide news and communication outlets unique to bases, providing targeted channels to reach this group. There is an opportunity to test this niche marketing with an in-state audience at the Malmstrom Base. Again, this could be a project within the region or with partnering regions. FY20 included the partnership of Megan Witham, an influencer and travel writer who has a big following with military families. She spent four days on a familiarization trip in May 2019 in the Yellowstone County region. Should budget allow, we would look at additional ways to target this audience in FY21.

EMERGING MARKETS

Craft Beverage Enthusiasts

Craft beverage venues (breweries, distilleries, wineries, cideries) have a growing following, and are found frequently in the Yellowstone Country region. Should budget allow, we would look at additional ways to target this audience in FY21.

Other Emerging Markets

Due to COVID-19, our focus will be domestic travel, so we would only implement advertising in the secondary markets if the budget did not have the expected decreases.

Key Demographic Markets for Yellowstone Country:

City dwellers (i.e., not rural, not suburban)
Affluent with a household income over $80K
Well-educated
Affluent with children

These characteristics were identified based on Destination Analytics reporting.

Key Psychographic Markets for Yellowstone Country:

Social Class - middle to upper class (in terms of disposable income)
Lifestyle - active, outdoor-recreation oriented, frequent travelers
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Activities and Interests - outdoor activities, history and culture, food/drink
Attitudes and Behaviors - environmentally conscious, adventurous spirits, like nature

Technology-savvy - using mobile devices in all stages of planning and travel

Families – Family travel

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1. What are your emerging markets?

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Fodors
Promoting the region’s best restaurants to travelers who are interested in fine-dine, unique dining experiences and Montana’s hospitality. Should budget allow, we would look at ways to target this audience in FY21.

Entertainment Seekers
If budget allows, we will capitalize on visitors who are coming to Montana for entertainment purposes (i.e., concerts, festivals, rodeos, etc.), encouraging them to extend their visit to include time exploring Yellowstone Country. As new venues, such as Bozeman’s historic Rialto Theatre, continue to startup, additional audiences will be drawn to Yellowstone Country for entertainment. A new music venue, The Elm, is set to debut in Bozeman in December 2020. Should budget allow, we would look at ways to target this audience in FY21.

Western Culture Seekers
With a concentration of ranch-style accommodations spanning from working dude ranches to five-star venues, there are retreats to suit every visitor’s idea of the perfect western vacation. Similarly, outfitters provide hands-on, genuine experiences in Yellowstone Country. With many visitors drawn to an authentic Montana experience, ranches and outfitters provide another means to reach a niche audience. Plans have already been discussed to include additional videography and photography for rodeos in FY21 and should budget allow, we would look at additional ways to target this audience in FY21.

International Visitors
Downloadable PDFs of brochures, travel guides, unique landing pages, etc.

Urban Areas
Marketing campaigns aligning with press events. Selecting urban areas of focus in relation to identified key markets. At a state level, anticipated markets include return trips to additional urban areas in California and Texas, in addition to new markets in New York, Pennsylvania and Minnesota.

Direct Flight Markets
Planning for the impact of COVID-19 in our marketing efforts will be the most difficult in the fly markets. At the time of this submission, the BZN airport is operating at approximately 5% of normal traffic, and all indicators are that air travel will be slower to return. However, since there are some indications that consumers are ready to book air travel, we intend to continue our digital & programmatic outreach in our identified fly markets. The segment of highly promotion we will be decreasing significantly in regards to COVID in our travel media & influence outreach program. In the past few years, YC has hosted to market media outreach events and trips for qualified/vetted travel journalists & media influencers who have the reach to our target audiences; our efforts in FY 21 will concentrate more on digital & social media components that help keep the region as a top-of-mind destination.

Create awareness around direct flights and entice travelers to consider Yellowstone Country as their next destination.

The Bozeman Air Transportation Committee continues to work on bringing new and increased air service to the region through planning and marketing efforts. The efforts is a public/private partnership between Yellowstone Country, Bozeman CVB, Big Sky CVB, Big Sky Resort, Yellowstone Club, Lone Mountain Land Companies and the Gallatin Yellowstone International Airport.

Current Direct Market Flights include:
- Atlanta
- Boston
- Chicago
- Dallas/Ft. Worth
- Denver
- Detroit
- Houston
- Long Beach
- Los Angeles
- Minneapolis/St. Paul
- New York (La Guardia & JFK)
- Newark
- Phoenix
- Portland
- Salt Lake City
- San Francisco
- Seattle/Tacoma
- Long Beach

Optional: Include attachments here.
- What research supports your target marketing?

Destination Analysts, Inc. found the following in its 2016 Montana Brand Exploration Research:

“Montana is an aspirational destination, and effectively converting this aspiration to visitation should well benefit the state’s tourism industry. When asked which of seventeen tested destinations they were likely to visit in the next five years, over one-in-five surveyed travelers selected Montana (21.0%). This level of interest in visiting Montana is notably greater than the rate of past visitation (21.0% vs. 15.8%), suggesting there exists considerable untapped demand.”

“Of all American destination types, international travelers have the most enthusiasm for U.S. National Parks, presenting Montana’s great potential for attracting international visitors.”

“Family travelers are a natural fit with Montana’s travel product, including that available in the eastern portion of the state. They are a large and lucrative segment. In the Montana Brand Exploration Survey, approximately one-third, 32.0 percent, of travelers reported having children under the age of 18 in their homes. Like high potential visitors, family travelers rate high on outdoor psychographics, have high incomes and would expect to spend more and stay longer in the state than other travelers.”

“History buffs are also clearly a high-value audience that fits Montana perfectly. They represent over one-third, 34.7 percent, of the overall population of the state’s key target markets. History buffs score higher on the outdoor psychographic index, have higher incomes and would spend more and stay longer in Montana compared to travelers who are not history buffs. Again, this is a large and lucrative niche segment.”

“Although retirees are an important current audience for Montana, they are a smaller, lower-value segment. This group represents approximately 15 percent of the overall population of the state’s key target market (14.7%). In an environment in which funds are available to address marketing segments, retirees do not appear to represent a high-value segment. Using all of the data points used to evaluate the other niche segments, retirees are problematic. In short, they are less interested in outdoor experiences while traveling, less excited about Montana, have lower incomes and when reporting about their ideal trip to the state, appear to be less likely to be big spenders.”

“The three core elements...from an analysis of the data collected in this research are (1) unique natural encounters without giving up modern comforts, (2) comfortable isolation that attracts self-sufficient adventurers, (3) a place for entirely new experiences and a place for new ways of experiencing the familiar.”

“Montana’s beauty is seen as different from that of its competitors. Its landscapes were described as feeling bigger and more open. As product differentiation is central to developing an effective brand platform, this should be considered a central element of how tourists perceive the state.”

ITRFR 2019 non-resident study data shows the average length of stay for non-resident visitors to MT was 3-4 nights, with 71% of those in Yellowstone Country. 17% of groups included first-time visitors to the state, and 57% were repeat visitors. 65% of non-residents said their primary reason for visiting was vacation/recreation/pleasure.

According to ITRFR’s Focus on Activities report, visitors are interested in the variety activities Yellowstone Country is promoting:

- Removing the typical “mass” tourism activities for each quarter (scenic driving, recreational shopping, attending a family event), niche activities emerged as a favorite and meaningful experience during travelers’ Montana trips for each quarter: Day hiking, watching wildlife and nature photography were universal favorites for all four quarters. Additional niche activities per quarter:
  Q1: skiing/snowboarding (62%), visiting breweries (29%), snowmobiling (17%), cross-country skiing (11%) and visiting museums (10%)
  Q2: Car/RV camping (28%), visiting museums (22%), visiting other historical sites (18%), visiting breweries (16%), fishing/fly-fishing (11%) and biking (10%)
  Q3: Car/RV camping (35%), visiting historic sites (21%), visiting museums (19%), visiting breweries (19%), fishing/fly-fishing (17%)
  Q4: Visiting breweries (23%), visiting historic sites (19%), Car/RV camping (14%), skiing/snowboarding (13%), visiting museums (11%)

The following 2019 ITRFR data shows those activities visitors were participating in while in the Yellowstone Country region:
- 52% Scenic driving
- 30% Day hiking
- 47% Wildlife watching
- 38% Nature photography
- 29% Recreational shopping
- 27% Car/RV camping
19% Visit local brewery  
18% Visiting historical sites  
18% Visiting museums  
11% Fishing / fly fishing  
9% Visiting Lewis & Clark sites  
9% Skiing/snowboarding  
7% Attending festivals or events  
7% Birding  
7% Viewing art exhibits  
6% Visit farmers market  
5% River rafting / floating  
4% Visit Indian reservations, horseback riding, dinosaur attractions, golfing  
3% Visit local breweries, canoeing/kayaking, snowmobiling, rockhounding, cross-country skiing  

The BZN airport provided the following 2019 data (January 08, 2020): Bozeman Yellowstone International Airport (BZN) handled 1,573,860 passengers during 2019. This is an increase of 231,570 passengers (17.3%) compared to 2018 and is the 10th consecutive year of record-breaking passenger traffic. Annual passenger traffic has more than doubled over the past 10 years and accounts for one third of all airline passengers traveling to and from Montana.  

Passenger totals in and out by airline brand in 2019 were:  
- Delta Air Lines – 549,668  
- United Airlines – 538,984  
- Alaska Airlines – 186,386  
- American Airlines – 149,753  
- Allegiant Air – 73,187  
- Frontier Airlines – 57,849  
- JetBlue – 15,415  
- Chartered Airline Flights – 6,618

Yellowstone Country provides staff funding for 10 VICs located throughout the region for the warm season Memorial Day – September. As a requirement of the funding, VICs compile statistical information including where visitors are from, how many in the party, primary/secondary reasons for travel to the area, types of activities they participate in, and events they plan to attend. Information provided by our VIC’s continues to be a strong resource for identifying new geographic, demographic & psychographic target markets and crafting marketing strategy.

GOALS

1. Increase YC BRAND Recognition: Continue to raise awareness and build excitement about the “Yellowstone experience beyond the park” concept across all seasons.
2. Increase recognition of regional communities as unique destinations by working with partner DMO’s & community organizations & leaders.
3. Increase awareness of Yellowstone Country’s natural, cultural, heritage and recreational assets by implementing strategic marketing campaigns & continuing promotion of events.
4. Increase Montana’s tourism economy by quality of visitor & not just quantity: target low impact, high value visitors.

PRIMARY GOAL

YC’s primary goal is to raise brand awareness of this region as a premier travel destination.

Objectives for meeting this goal:

- Implement strategic media campaigns that reach our targeted audience(s)
- Implement supporting resources for managing & tracking marketing & promotion campaigns
- Encouraging visitation to authentic cultural & heritage assets
- Sharing the “local flavor” through promotion of festivals & events throughout the region
- Highlighting the abundance of outdoor recreation opportunities

In what types of co-ops with MTOT would you like to participate?

YC is looking for additional opportunities to create co-ops impacting direct flight markets and the state. Yellowstone Country continues to work in cooperation with the BZN Air Transportation Committee (comprised of airport representatives, local partners and MTOTBD) to implement marketing campaigns in targeted markets to increase air service, but seeks opportunities to work with MTOTBD and other regions to implement airline marketing that benefits the entire state. It is likely that for FY 21, we are considering the following MOTBD Advertising Joint Ventures:

- Sojourn
- Trip Advisor
- VisaVue
- Partnership Magazine

If MOTBD offers specific winter and shoulder season campaigns that fit our target markets, those would be strongly considered.

YC would participate in Joint Ventures with MOTBD, the Regions & CVBs to promote Native American culture, history and visitation. The JV’s could take the form of traditional advertising and partnering to host travel media & influencers.

YC will continue to partner with MOTBD and other Regions/CVBs on an ongoing basis for:

- Montana Dinosaur Trail (brochures, website, marketing campaigns)
- Greater Yellowstone Region Mapguide brochure

Optional: Include attachment here.
YC will continue to foster partnerships with CVBs and other regions to allow for a greater impact of marketing efforts through social media, press trips, digital and print advertising, and consumer collaboration to promote tourism. In FY 20, YC partnered with Glacier Country, Southwest Montana, and Destination Missoula, as well as a number of in-region CVBs. We look forward to identifying additional opportunities outside—and outside of—their region in the future. For FY 21, our focus will be to partner with other regions to promote common emerging and niche markets identified in this plan. In FY 21, YC will participate in a joint venture for On The Snow with to promote our ski areas since one will not be offered again by MOTBD.

For FY 21, we are considering these joint ventures with other regions/CVBs:

- Glacier Country (Print & Digital)
- Continuation of Glaciers to Geysers, a separate project
- Destination Missoula (Print & Digital)
- Southwest Montana (Print & Digital)
- Possibly other CVBs in Region

Building partnerships with organizations and businesses throughout the region will also continue to be a major focus for Yellowstone Country. We expect to have many opportunities to combine marketing efforts to help leverage branding and budgets, within both the public and private sectors. One opportunity would be to provide cost sharing for smaller communities to access data and conduct surveys through TRB.

Due to scales of economy, many of the seven regional CVBs wouldn’t be able to participate in large-scale efforts without YC’s partnership. Therefore, it is a primary goal to continue offering creative marketing partnerships with feasible costs to our regional CVBs. Additionally, YC will continue to vet opportunities to partner with Montana State Parks to promote the four state parks in the region as both stand-alone destinations and as part of the “Biggie” experience. Comparing the average state park visitor demographic profile to the YC visitor profile shows there is a strong similarity in these audiences. YC would participate in joint ventures with MOTBD, the Regions & CVBs to promote Native American culture, history, and visitation. The JVs could take the form of traditional advertising and/or partnering to host travel media & influencers.

c. What types of co-ops have you done in the past? Were they successful - why or why not?

YC offers co-op opportunities for regional CVBs and businesses. We work to provide a greater impact and opportunity for underfunded entities to advertise nationally. This year, we offered annual, winter specific, and warm season specific co-ops, with great participation. YC region co-ops have been the most successful because they help communities raise awareness and promote local events. YC has also partnered with CVBs and businesses for several press trips and video shoots throughout the region.

TripAdvisor, Network Programmatic banner and video, in-state digital and national print co-operators have given the entire region a presence, with the intention of continued growth and development of future options. In this model, YC has been able to offer digital and print packages to in-region partners at a fraction of the cost of the overall placements.

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Marketing Segment, Method & Budget

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<tr>
<td>Consumer</td>
<td>Print Advertising</td>
<td>The strategy for print advertising is to place highly targeted advertising and display content in key publications that reach a specific audience. Examples: Skiing, snowboarding, lifestyle publications.</td>
<td>Print advertising is an especially viable method when there is advertising content that provides the opportunity for either in-depth messaging believed for a niche audience, or more generalized messaging for mass market.</td>
<td>The primary objective for print advertising is to raise brand awareness. To measure success, we will utilize the following metrics such as website traffic, social media engagement, call center activity, and requests for additional information.</td>
<td>To specifically measure these metrics, YC will use the following benchmarks to measure success:</td>
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Digital advertising promotes awareness of outdoor recreation, spectacular nature and charming small towns in Montana Yellowstone Country region. The primary seasoned focus is winter, followed by warm & shoulder season. This campaign includes a national focus, as well as placement in regional top markets to push awareness to local media avenues with direct flight.

1. Digital Advertising Drive SEO
2. Digital Advertising E-commerce The Effectiveness Of Non-Digital Media Channels
3. Digital Advertising Is Effective Across The Entire Customer Journey
4. Digital Advertising Word Of Mouth MI Scale
5. Digital Creative Drive Interaction & USSL Brands
6. Digital Advertising Is More Efficient Than Traditional Media
7. Digital Advertising Is Essential To Reaching An Audience
8. Digital Advertising Is Even More Effective Than We Know

1. CPL is dependent on markets and target audience. Gender always is broken down. By measuring goals with other metrics we will be able to determine whether that buy and strategy is successful.

5. Cost Per Click (CPC)
- Total CPC goal of under $4.00 for digital placements and under $5.00 for social placements.
- Because Yellowstone Country's FY19 funding was committed to this target, any cost may be a decrease in total media buys which will equally lead to a decrease in total clicks.

Website/Internet Development/Updates

This component represents multiple components of website work.

1. Continued development of features and offerings.
The primary objective in FY19 was the continued development of a relatively new website. The situation varies on an interactive messaging, blog content, social media accounts, promoted libraries and access to print-endowed media, among others.

2. Content strategy. An ongoing focus is to continuously build content to give visitors a reason to return. This content will live on the website as well as being pushed through print and earned channels.

1. Site management & maintenance. Website management and maintenance includes electronic database creation and maintenance, regular publish/edit, updating, website performance tools & reports, adding to media & content libraries, link review & changes, testing & bug resolution.

3. Marketing/SEO/SEM
- Our primary goal is to expand our branded web presence that complements and strengthens the efforts at all Yellowstone Country marketing channels. The website serves as a repositioning tool for both first-time and return visitors, so keeping content updated and fresh is key. Our primary KPI going forward in FY20 will be increasing the amount of engaging content while researching updated best practices for SEO.

$b70,000.00

$b90,000.00

Website Design/Development/Build

Both tools lead – Search Engine Marketing (SEM) and Search Engine Optimization (SEO) are paramount to the continued success of a working website.

Both tools increase the amount of website visitors by getting the site to appear high on results returned by a search engine. SEM is considered internet marketing and increases a site’s visibility through organic search engine results and advertising, SEM includes SEO as well as other search marketing tactics.

http://www.research.com/vcss-content.html

http://www.intechnic.com/blog/why-content-is-the-most-important-thing-on-your-website/

http://www.nextflywebdesign.com/update-website-content/

http://blog.bufferapp.com/8-effective-email-strategies-backed-by-research

http://www.marketingeye.com/blog/marketing/the-benefits-of-sem.html

http://www.monitorbacklinks.com/blog/seo/measure-seo-performance


Digital Advertising is the most important thing on the website: 1. Cost Per Click (CPC) 2. Conversions to the Yellowstone Country website 3. Estimated Impressions v. Actual impressions 4. Clicks 5. Click Through Rate (CTR) 6. Cost Per 1,000 Impressions (CPM)

SEO will be tracked by:

Today, SEO is a staple of any marketing strategy. Improving SEO is a top priority of YC as our channels are being pushed through print and earned channels. Our focus will be on creating a marketing campaign for the website as a whole. A strong SEO & SEM strategy will allow increases in visitation and a better chance of turning those website visitors into actual visitors in the region. SEM & SEO will help YC stay in the forefront of the competitive internet searches.

$b55,000

Social Media

Direct marketing campaigns will be highly targeted and integrated. Email marketing will allow YC to build relationship by providing the right information at the right time to people who already have a connection to the region. We will use informative content & great imagery for inspiration - and to intend an experience.

http://blog.bufferapp.com/10-effective-email-strategies-backed-by-research

http://www.forbes.com/sites/lesleymiller/2016/03/01/real-vs-social-media-marketing-most-effective-method-every-channel-is-different/

http://www.theinsightproject.com/us/americas-marketing-must-reads/

http://www.marketingeye.com/blog/marketing/the-benefits-of-sem.html

http://www.campaignmonitor.com/essential-guide-to-email-marketing/newsletters/

1. Email is effective because it's permission based. The people on our email list are interested in our content. Email marketing makes sense because it's scalable and scalable and can include social media, online video and other marketing elements all within one connected marketing messaging. Our focus will be on the primary, secondary & emerging/new target markets identified in the plan narrative.

$b21,000.00

Digital Video

1. Estimated Impressions v. Actual Impressions: With social media, print and broadcast media efforts. Our focus will be on creating the primary, secondary & emerging/new target markets identified in the plan narrative.
In FY21, Yellowstone Country plans to implement a targeted email marketing strategy to increase engagement and website visitation among our current email subscribers.

After narrowing down our target group, we will conduct a survey asking subscribers to select the topics they find most interesting. We will then fine-tune that segment with a specific communication strategy based on connecting with recipients through their stated interests.

Initial email streams to break down as follows:

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**In FY20**, Consumer Electronic Adv - Newsletter, Support Administration, Marketing, Joint Ventures, and Consumer  Joint Ventures were identified and implemented for specific target geographic & demographic markets and may include any/all of the following: incentives, codes, print, internet, radio, and display advertising. This would include cooperative advertising programs with MT Office of Tourism and other Region/Circle as applicable sector or funds above.

As with all marketing, joint ventures projects 50% participation in will be specific to promoting outdoor activities/recreational experiences.

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The Crisis Management method will be used to address unexpected & unforeseen issues as they arise. These would be things that could potentially impact the visitor experience, including—but not limited to—fires, construction/construction closures, pandemics, wildfires, etc. The strategy is to work with these partners to develop & promote more “product” in communities that helps increase visitation, but also raises financial & marketing support for culinary, sporting, musical, & heritage activities, and/or lifestyle culture the community is promoting. The CTM to distribute travel planners and scenic maps. These facilities store the YC travel planners & fulfill bulk order requests, and stock the call center.

Opportunity marketing projects will be identified & implemented for specific target psychographic, geographic & demographic markets. This budget supports distribution of YC's printed materials to both resident and non-resident visitors, shipping, postage and the call center.

YC will produce promotional items & materials to be used in conjunction with hosted press trips and media outreach/events. We want to ensure our giveaways make sense to your brand and not be too expensive as giveaways—1.

Offer a Taste Community – What better way to sell your destination than one-on-one interaction with the traveler. Display Brochures, rack cards, guidebooks & other printed material. Personal interaction and engagement with visitors. Offer a Taste Community, offering a better way to sell your destination than one-on-one interaction with the traveler.

http://www.quora.com/How-do-opportunity-costs-affect-the-capital-budgeting-decision-making-process-

Good information exists that supports a business maintain an Opportunity and/or Crisis Fund. Reason: When they say that businesses need to set aside both an Opportunity and/or Crisis Fund, they are making the assumption that businesses are aware that there will be both an opportunity and/or crisis in each business year. YC’s OPPORTUNITY budget is intended to be a reserve of funds so as to be able to take advantage of opportunities as they arise, the fund would be impacted in the year the opportunity arises and/or it would be utilized to aid industries during the course of the year. YC does not want to sit on a large sum of money for an extended period of time, in FY 20, YC seeks to cover YC’s Core Function and be able to respond to any extraordinary initiatives presented to the plan.

http://www.gounesco.com/cultural-tourism-sustainable-development/

YGW, 2019, YC provided grants for eight community events and/or cultural happenings/projects in the region. The total # of visitors assisted during the FY 19 funding period (Memorial Day Weekend-Labor Day) increased nearly 10% over the same timeframe the previous year, serving 45,000+ visitors in 9 regional YCs. Seven YCs reported visitor increases, while three reported a decrease. The largest increase reported was seen at the Bonney Lake Airport. Western Washington & Greater YC. Although 2020 is not a comparable year due to COVID-19 restrictions. ITTR 2019 Non-resident data shows that 48% of survey respondents who answered questions about using a VIC as an information resource stated that they utilized a VIC during their trip.


Survey respondents said they utilized a VIC during their trip. About using a VIC as an information resource said they called a VIC for information & 55% of survey respondents who answered questions about using a VIC as an information resource stated that they utilized a VIC during their trip.

The VIC program is an integral part of YC’s overall marketing effort & continues to be very successful. Visitor information Centers are an important resource for travelers seeking information about a destination. Their success is due to the fact that YC continues to support the overall program by maintaining and upgrading the website and IT infrastructure. In addition to being an important information resource, VICs serve as an important travel planning tool.

http://www.gouted.com/culture/learn-sustainable-development-


CTM to distribute travel planners and scenic maps. These facilities store the YC travel planners & fulfill bulk order requests, and stock the call center. Viable projects. Our focus will be on the primary, secondary and tertiary markets/segments inherent to the plan.

Travel information is the most valuable tool a traveler can use when making a decision on what to do and where to go. In FY 19, YC provided grants for eight community events and/or cultural happenings/projects in the region. YC’s Opportunity budget is designed to be a reserve of funds so as to be able to take advantage of opportunities as they arise, the fund would be impacted in the year the opportunity arises and/or it would be utilized to aid industries during the course of the year. YC does not want to sit on a large sum of money for an extended period of time, in FY 20, YC seeks to cover YC’s Core Function and be able to respond to any extraordinary initiatives presented to the plan.

http://www.gouted.com/culture/learn-sustainable-development-

Reason for setting aside Opportunity funds for a business are poorly defined. The CTM will do its best to monetize the use of a promotional item, but it is not possible to determine each year if funding the VICs would be impactful. As we learned in 2020, in a pandemic such as COVID-19 can cause substantive changes to the visitation, so having funds to be able to help visitors to the region.

The call center is an integral service piece to the core offer. It offers key support for visitors to the area, so having funds to be able to support the call center.

Opportunity funding projects will be evaluated against the following: We would measure success by being able to attest to that our efforts:

1. Help the public obtain of current information.
2. Mitigate the negative presumptions travelers may have.
3. Move people to areas of the region that are not impacted.

Reason for setting aside Opportunity funds for a business are poorly defined. Every year there is a potential impact during the fall seasons. Additionally, changes to both highway, airline, etc can also be impactful. As we learned in 2020, in a pandemic such as COVID-19 can cause substantive changes to the visitation, so having funds to be able to help visitors to the region.

The total # of visitors assisted during the FY 19 funding period (Memorial Day Weekend-Labor Day) increased nearly 10% over the same timeframe the previous year, serving 45,000+ visitors in 9 regional YCs. Seven YCs reported visitor increases, while three reported a decrease. The largest increase reported was seen at the Bonney Lake Airport. Western Washington & Greater YC. Although 2020 is not a comparable year due to COVID-19 restrictions. YC’s Opportunity budget is intended to be a reserve of funds so as to be able to take advantage of opportunities as they arise, the fund would be impacted in the year the opportunity arises and/or it would be utilized to aid industries during the course of the year.

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http://www.gouted.com/culture/learn-sustainable-development-

ITTR 2019 data for the YC region, attending festivals & events, visiting farmer’s markets, among travelers—particularly affluent, active, and frequent travelers—is on the rise. “cultural tourists.” Thirty percent of adults state that specific arts or a cultural or heritage event is a reason to travel. 150,000,000+ adults who travel more than fifty miles from their homes can be considered cultural tourists. The total # of visitors assisted during the FY 19 funding period (Memorial Day Weekend-Labor Day) increased nearly 10% over the same timeframe the previous year, serving 45,000+ visitors in 9 regional YCs. Seven YCs reported visitor increases, while three reported a decrease. The largest increase reported was seen at the Bonney Lake Airport. Western Washington & Greater YC. Although 2020 is not a comparable year due to COVID-19 restrictions.

Visitor data essential to helping build a successful marketing strategy for the region. YC’s OPPORTUNITY budget is designed to be a reserve of funds so as to be able to take advantage of opportunities as they arise, the fund would be impacted in the year the opportunity arises and/or it would be utilized to aid industries during the course of the year. YC does not want to sit on a large sum of money for an extended period of time, in FY 20, YC seeks to cover YC’s Core Function and be able to respond to any extraordinary initiatives presented to the plan.

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3. Move people to areas of the region that are not impacted.
In FY20, our focus was to build engagement through rich content, (including blogs and emails.) Increase User Generated Content, utilize Facebook and Instagram stories, increase our views and maximize our performed content through targeted paid posts. Fiscal year to date, we increased our traffic from social media by 88% to 32,848 from 17,414 during the same period the prior year. 189,998 from Facebook alone has almost doubled, 48% over the previous year. Organic traffic, which hitherto from our content, has increased 30.99% YTD. This analysis tells us that our current strategy is working. In FY21, we will continue to build on this foundation but will dial-in our content strategy to become even more focused.

Michael Williams, Senior Social Media Manager for Jellyfish, a marketing and advertising agency in London says, “When it comes to creating content, brands need to counteract the social media noise, think ‘less is more’, and create messaging that actually resonates with their key audience(s),” Williams said.

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Our additional focus will be to:

- Increase our use of Pinterest.
- Recognize engaging pages and give them a lift in reach.
- Increase our use of Instagram and Facebook stories, as well as videos.
- Segment these posts and promote them via paid social.
- Continue to use Google Analytics to track and optimize our social media marketing efforts. In FY21, we will measure our social media success as follows:
  - Increase website visits from social media by 20% to 35%
  - Increase engagement by 10% to 15%
  - Increase link click by 10% to 15%

For paid social media placement, like all digital marketing efforts, the key out to action will be to drive audiences to the website. So YC will use the following metrics for paid social media campaigns over the upcoming year:

1. Engagement Impressions vs. Actual Impressions
   - Few actual impressions 30% higher than estimated impressions.
   - Keep click-through rates above 15%.

2. Clicks
   - Keep total clicks by 5%.

3. Cost-Per-Click (CPC)
   - Keep a click-through rate above 25%.

4. Cost Per 1,000 Impressions (CPM)
   - CPM is dependent on markets and target audiences. Goal: as always is to increase awareness of our products and services.

5. Cost-Per-1,000 Impressions (CPM)
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As Instagram experiments with the removal of ‘likes,’ having quality engagement becomes even more important. In FY21, we will measure our social media success as follows:

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YC's research strategy is geared toward ‘getting to know’ the visitor, drilling down to find out more about who is coming, why, when, where and what they are doing while they are here. The results of these measures will help YC to market itself better to visitors. Research projects will be focused on these outcomes:

- Define the people who make up the region’s visitors
- Help define how best to advertise to the target market
- Help define our competitive edge

Success will be measured by having useful, relevant data for developing and/or revising both short-term & long-term marketing strategies.

Research is a powerful business tool to understand people’s behaviors and the cause and effect those behaviors have on travel decisions. Research brings another voice to the conversation—the target audience’s— that is objective, free of organizational bias and can be used for planning and for evaluating purposes.

### Marketing Method Evaluation Attachments

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<th>Attachment</th>
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<tr>
<td>Attachment 1</td>
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<td>Attachment 2</td>
<td>FY 21 BUDGET PIE CHART-SEGMENTS PDF.pdf</td>
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### Marketing Method Budget

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### Miscellaneous Attachments

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### Reg/CVB Required Documents

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