



Grant Details

68892 - FY19 Region/CVB Marketing Plan

72762 - FY19 Yellowstone Country Marketing Plan
DOC Office of Tourism

Grant Title: FY19 Yellowstone Country Marketing Plan
 Grant Number: 19-51-009
 Grant Status: Underway
 Comments:
 Applicant Organization: Yellowstone Country Montana, Inc.
 Grantee Contact: Robin Hoover
 Award Year: 2018
 Program Area: DOC Office of Tourism
 Amounts:
 Contract Dates: Contract Sent: 06/20/2018
 Project Dates: Proposed Date: 07/01/2018
 Grant Administrator: Barb Sanem
 Contract Number: 19-51-009
 Award Year: 2018
 Contract Dates:

07/01/2018
Project Start

Contract Received

06/30/2019
Project End

Contract Executed

Contract Sent Contract Received Contract Executed Contract Legal

Project Dates 07/01/2018
06/30/2019

Project Start Project End

Comments
Amendment Comments

Community & Brand Support

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

PURPOSE

Yellowstone Country (YC) is a non-profit marketing organization formed solely to promote the south-central tourism region consisting of Gallatin, Park, Sweet Grass, Stillwater and Carbon counties, as well as Yellowstone National Park. YC is a year-round destination with countless leisure, cultural and recreational opportunities.

PRIMARY GOAL

YC's primary goal is to market the "Yellowstone Experience" that can be found throughout the region outside Yellowstone National Park. This is the differentiator that sets the Yellowstone Country (YC) region apart from competitors. Visiting the world's most famous national park is a must for many people, but we want to broaden that experience to encompass what can be found just outside the park.

Folks who live in the region already know about our spectacular & pristine scenery, abundant wildlife, wide-open spaces and top-notch outdoor recreation opportunities. We want to share with visitors why this a great place to spend their leisure time.

STRENGTHS

Yellowstone Country's core strengths include its main 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 Fishtail and back to Absarokee), and many, many other routes through Yellowstone National Park.
- Major 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.
- Annual Events: Unique local festivals, farmers markets, fairs, community rodeos, Independence Day celebrations and countless other events, including long-running events like the **West Yellowstone Snowmobile Expo** or **Livingston Roundup Rodeo**, and newer events such as the **Red Lodge Songwriters Festival**. There's always something going on in Yellowstone Country's regional communities.
- Recreational Opportunities: A sampling, in addition to other well-known offerings like skiing and snowmobiling, includes wildlife viewing in and around Yellowstone National Park—water recreation (fishing, boating, rafting, kayaking, swimming), ice climbing, hiking, snowshoeing and soaking in the **Boiling River** just inside the park. For those who may wish to experience the western way of life, there are working ranch vacations or the more traditional "dude" ranch experiences.
- 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 Lands: 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 provide 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. **Greycliff 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.

Dinosaur Trail—the trail has become a significant attraction across the state, and the **Museum of the Rockies** serves as an anchor facility on the trail.

CHALLENGES/OPPORTUNITIES

- Inclement Weather Conditions/Natural Disasters: Fire, floods, etc.
- Climate Change: Changes in climate affect recreational opportunities (such as fishing), the economy (tourism and related jobs) and our environment (wildlife and plant populations).
- Transportation Issues: Public transportation, seasonality of service.
- Economic Climate: Budget cuts.

- Infrastructure: As the number of visitors increases, is the infrastructure sufficient to handle growth?
- Crowding/Overuse in YNP: Real or perceived.
- Seasonality: Weather, amenities/service availability and staffing all have an impact on the potential growth of shoulder seasons.
- Opportunity to market shoulder season activities to Montana residents, empty-nesters and singles.
- Ability to entice a younger demographic with endless recreation and rich culture.
- Increased air service opens new markets.
- Increasing diversity and frequency of international visitors who may not be familiar with the outdoors or related challenges such as weather, distance and access. Additionally, there may be language and currency barriers.

Describe your destination.

MONTANA BRAND PILLARS

YC aligns effortlessly with Montana's Brand Pillars. There is an abundance of spectacular, unspoiled nature, and given the multitude of recreational options, the region certainly meets the definition of offering breathtaking experiences. As with the majority of Montana, our communities are known for having friendly, hospitable people who work hard to help make a visitor's experience one to remember.

- **SPECTACULAR, UNSPOILED NATURE** Yellowstone Country is anchored by two major iconic destinations: *Yellowstone National Park* and the *Beartooth All-American Road (BAAR)*. *Custer Gallatin National Forest*, *Absaroka-Beartooth and Lee Metcalf wilderness areas*, *BLM areas and city/county trail systems* are all within a short distance from population centers, so, one can be in any community in the region and truthfully say they are "surrounded by spectacular, unspoiled nature." From the mountainous areas to the wide-open prairies, YC abounds with the very best Mother Nature has to offer.
- **BREATHTAKING EXPERIENCES BY DAY, 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 fun 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 time taking in the surroundings. Breweries and distilleries are popular, and YC is known as a great place to experience this "lifestyle" culture. Local eateries are always a top priority for visitors, and range from casual to fine dining, with cuisine available for any taste or dietary restriction/preference.
- **VIBRANT, CHARMING SMALL TOWNS THAT SERVE AS GATEWAYS** Showcasing the region's diverse, welcoming communities is an integral part of YC's marketing strategy. Each place has a unique local culture that makes it stand apart from neighboring towns. Explore Gardiner, Red Lodge, Cooke City, Livingston, Bozeman, Big Sky, West Yellowstone and every town in between. There are hidden (and not-so-hidden) gems for experiencing local community hospitality. Better yet, these communities are the gateways to whatever and wherever a visitor wants to experience.

2. How will your marketing plan address the three phases of the travel decision process of inspiration, orientation and facilitation?

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: Campaign messaging and imagery are specifically designed to address the Inspiration phase to targeted audience segments. **By leveraging YC's tagline, "Boldly Go," the Yellowstone Country brand will continue to embody the spirit of visitors.** This messaging inspires visitors and potential visitors to view themselves, and their destination, through the lens of Montana's brand...free-spirited, adventurous, genuine and captivating.

Local events throughout the region also provide ample opportunities for creative, inspirational marketing.

Email communication to targeted audiences promotes specific opportunities at critical points throughout the year, allowing for relevant communication to reach the right people.

Social Media supports the Inspiration and Orientation phases, as we consistently engage consumers throughout a season or in relation to a specific community, event, attraction or activity. We utilize consistent blog posts to tell the stories of our culture, recreation, people and events and are seeing terrific engagement. Potential opportunities include: *increased social video content; Snapchat filters; Instagram takeovers, stories and video; Pinterest pins; and Facebook Live videos.* Finally, we'll continue to use unique hashtags (#yellowstonecountry and #BoldlyGoMT) to encourage organic discussions specific to the YC brand.

Perhaps most critical, though, is our continued partnership and alignment of internal and external resources. We partner together to develop a comprehensive social media plan, lining up internal and external resources to create efficiencies and ROI.

ORIENTATION AND FACILITATION: 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, although all 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 website creates 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 call center provides personalized assistance to people interested in (or currently visiting) Yellowstone Country. It also provides the opportunity to gather data about visitors and prospective visitors, which informs future planning.

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 orientation and facilitation. Targeted marketing campaigns in these markets, aligning with press events, encourage additional and continued conversation. Branded promotional boxes (including high-quality swag items and local treats), provide an opportunity to keep top-of-mind presence with attendees.

Following press events, custom itineraries are crafted for select media members to visit the region and provide targeted coverage to their respective audiences.

Finally, YC funds 10 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

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

TARGET MARKETS

In FY18, key geographic markets included:

New York, NY
Los Angeles, CA
Chicago, IL
Washington, DC
Denver, CO
Dallas/Fort Worth, TX
San Francisco, CA
Atlanta, GA
Minneapolis/St. Paul, MN

These markets were identified based on Destination Analysts reporting.

Bold locations represent press event focus areas in FY17 and FY18.

In FY19, key geographic markets include:

California

San Diego

Fresno

Los Angeles

Sacramento

San Francisco

San Jose

Modesto

Direct flights: Los Angeles and San Francisco

Illinois

Chicago

Rockford

Downers Grove

Direct flight: Chicago

Texas

San Antonio

Houston

Dallas

Fort Worth

Austin

Direct flights: Dallas/Fort Worth and Houston

Florida

Jacksonville

Tampa

Miami

Orlando

Naples

Ohio

Cincinnati

Youngstown

Dayton

Columbus

Pennsylvania

Pittsburg

Philadelphia

York

New York

New York

Rochester

Staten Island

Brooklyn

Direct flights: Newark and New York La Guardia

Wisconsin

Milwaukee

Eau Claire

Waukesha

Green Bay

Michigan

Holland

Grand Rapids

Detroit

Flint

Missouri

Saint Louis

Kansas City

Florissant

Poplar Bluff

Springfield

Indiana

Indianapolis

Fort Wayne

South Bend

Minnesota

Minneapolis

Woodbury

Rochester

Fairmont

Direct flight: Minneapolis/St. Paul

***These markets were identified based on FY18 inquiries (including website inquiries, live chats and incoming calls).*

Bold locations represent potential future press event areas. Underlined locations represent previous press event areas.

Key Demographic Markets for Yellowstone Country:

City dwellers (i.e., not rural, not suburban)

Affluent with a household income over \$80k

Well-educated

Married with children

***These characteristics were identified based on Destination Analysts 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, foodies

Attitudes and Beliefs - environmentally conscious, adventurous spirits, like nature

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

***These characteristics were identified based on Destination Analysts reporting.*

b. What are your emerging markets?

EMERGING AND 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.

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.

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-ride) messages.

Snowmobilers

Snowmobiling continues to expand in popularity and attract new audiences. Between guided trips and the option to go sled 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, snowmobile campaigns could include itineraries, maps, targeted media buys and a combination of in-state (drive) and out-of-state (fly-ride) messages.

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 State Park) 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 region, or with partner regions, ideally expanding to a state-wide birding map over time.

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 citizen 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.

Craft Beverage Enthusiasts

Craft beverage venues (breweries, distilleries, wineries, cideries) have a growing following, and are found frequently throughout Montana. A targeted campaign could be considered for a craft tour, for instance.

Foodies

Promoting the region's best restaurants to travelers who are interested in fine dining, unique dining experiences and Montana's hospitality.

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 sprout up, additional audiences will be drawn to Yellowstone Country for entertainment.

Western Culture Seekers

With a wide variety of ranch-style accommodations spanning from working dude ranches to five-star venues, there are ranches 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.

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

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 committee is a public/private partnership between Yellowstone Country, Bozeman CVB, Big Sky CVB, Big Sky Resort, Yellowstone Club and the Gallatin Yellowstone International Airport.

***Current Direct Market Flights include:**

Atlanta

Chicago

Dallas/Fort Worth

Denver

Houston

Las Vegas

Los Angeles

Minneapolis/St. Paul

New York La Guardia

Newark
Phoenix
Portland
Salt Lake City
San Francisco
Seattle/Tacoma
Long Beach (starting winter 2018/19)

Optional: Include attachments here.

c. 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. 13.8%), 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 index 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 markets (14.7%). In an environment where limited 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 free-spirited 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 travelers perceive the state."

In a preliminary report by the Institute for Tourism and Recreation Research, 2017 tourism numbers included 12.2 million visitors who spent \$3.3 billion in Montana.

ITRR 2017 non-resident study data shows the average length of stay for non-resident visitors to MT was 5.89 nights, with 69% of those in Yellowstone Country, 13% were first-time visitors to the state, and 74% were repeat visitors. 53% of non-residents said their primary reason for visiting is vacation/recreation/pleasure.

According to ITRR's Focus on Activities report, visitors are interested in the very 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 were:

Q1: skiing/snowboarding, snowmobiling, visiting breweries, hunting

Q2: Car/RV camping, fly-fishing, visiting historic sites, visiting breweries

Q3: Car/RV camping, fly-fishing, motorcycle touring, visiting historic sites, rafting/floating

Q4: Hunting, car/RV camping, fly-fishing, dining as a special activity

*The following ITRR data shows those activities visitors were participating in while in the Yellowstone Country region:

- 64% Scenic driving
- 50% Wildlife watching
- 43% Day hiking
- 38% Nature photography
- 26% Recreational shopping
- 26% Car/RV camping
- 26% Visiting historical sites
- 14% Visiting museums
- 16% Visiting local breweries
- 14% Visiting Lewis and Clark sites
- 10% Fishing/fly-fishing
- 9% Skiing/snowboarding
- 8% Attending festivals and events
- 8% Birding
- Followed by viewing art exhibits, river rafting/floating, canoeing/kayaking, farmers markets, dinosaur attractions, etc.

*The BZN airport provided the following 2017 data (January 10, 2018):

- Bozeman Yellowstone International Airport (BZN) handled 1,199,537 passengers during 2017. This is up 8.3% compared to 2016 and is the eighth consecutive year of record-breaking passenger traffic at BZN. Annual passenger traffic at BZN has increased by more than 500,000 passengers since 2010, and BZN now accounts for 30% of all airline passengers traveling to and from Montana.
- During 2017, the three fastest-growing markets from BZN were Dallas/Ft. Worth (expanded service on American), Chicago O'Hare (now with year-round daily service on United and new summer and winter nonstop service on American), and Portland, Oregon (expanded service by Alaska Airlines). Looking forward into 2018, BZN will see a 130% increase in nonstop service to New York/Newark on United, a 40% increase in capacity with larger aircraft and daily year-round service to Dallas/Ft. Worth on American, and 20% capacity expansions to four nonstop markets out of BZN: Chicago O'Hare (United and American), Minneapolis/St. Paul (Delta), Los Angeles (United, Delta and new summer Saturday service on American) and Houston Intercontinental (United).
- BZN is the eighth busiest airport in the seven-state northwest region of the country (including Colorado, Utah, Wyoming, Idaho, Montana, Oregon and Washington) and the 109th busiest airport in the nation in terms of passengers.

Passenger totals in and out by airline brand in 2017 were:

- Delta Air Lines – 438,912
- United Airlines – 424,756
- Alaska Airlines – 180,481
- American Airlines – 74,405
- Allegiant Air – 57,870
- Frontier Airlines – 18,700
- Chartered Airline Flights – 4,413

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. Observations of any specific changes/trends are noted by the travel counselors. The 2017 regional VIC data report shows 553,555 (up from 2016's 507,924) visitors during the 2017 season. 2017 ITRR data specific to West Yellowstone shows that 30% of the visitors who spent at least one night in West Yellowstone utilized the VIC.

GOALS

• Continue to raise awareness & brand Yellowstone Country region as a premier Montana year-round outdoor destination - the "Yellowstone experience outside the park" concept will deliver a strong, consistent message across all seasons.

• Seek & implement partnerships throughout the region to better "showcase" outdoor recreation opportunities and historical, cultural & natural assets of local communities. This local culture or "flavor" helps visitors have the authentic experience they are seeking.

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

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YC is looking for additional opportunities to create co-ops impacting direct flight markets. For instance, Yellowstone Country has worked in cooperation with the air transportation committee (comprised of airport representatives, local partners and MTOTBD) to implement marketing campaigns in targeted markets to increase air service.

Moving forward, we are interested in developing further strategies to partner with MTOTBD to support our marketing efforts and goals from both a seasonality and target audience perspective. In FY19, we are most likely to participate in LiveIntent, Sojern and OnTheSnow joint ventures, in addition to maintaining our current involvement in TripAdvisor joint ventures.

Highly targeted research opportunities would also be very useful. YC would likely participate in research projects that provide relevant data that helps to define the target audience as well as follow-up research and/or conversion studies for evaluative purposes.

Given the recent creation/implementation of the Indian Country tourism region, YC would be interested in participating in MOTBD-led marketing projects with all the regions and/or the CVBs.

Optional: Include attachment here.

b. In what other types of co-ops would you like to participate? (Regions/CVBs, etc.)

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 collateral to promote tourism. In FY18, YC partnered with Glacier Country and Destination Missoula (with great success), and we look forward to identifying additional opportunities inside—and outside—of our region in the future. For FY19, our focus will be to partner with other regions to promote common emerging and niche markets identified in this plan.

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 ITRR.

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 "bigger" experience, i.e., stay longer, do more. Comparing the average state park visitor demographic profile to the YC visitor profile shows there is a strong similarity in these audiences.

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

Recent Trip Advisor JV campaigns have given the entire region a strong presence. MOTBD's Joint Venture winter digital campaigns have also been very successful for YC—our results have consistently performed above expectations and in multiple instances, the results have been far above industry and/or national benchmarks.

YC continues to partner with MOTBD and other Regions/CVBs on the JV Dinosaur Trail attraction. A recent grant from MOTBD (and matching funds from funding partners) has allowed for a rebuild of the trail website in 2018.

YC also participates in the Greater Yellowstone Region Mappguide brochure JV project, providing funding for brochure updates & reprint projects as necessary.

Re international marketing, YC participates in the Brand USA JV annually when offered. This always seems to be a very effective way of reaching the broader international audience.

Optional: Include attachments here.

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Marketing Segment, Strategy & Budget

Marketing Segment	Marketing Method	Does research support this method?	Describe your method.	Supporting research/statistics	How do you plan to measure success?	Provide a brief rationale.	Estimated budget for method.	Marketing Method Evaluation	Are you using private funds to support this method? (optional)	Non bed tax funds used? Yes/No (optional)	Add'l Attachments
Consumer	Online/Digital Advertising	Yes	<p>The strategy for digital (and all media placement) is the following:</p> <ol style="list-style-type: none"> Setting a Goal - determining who we are targeting & the desired outcome Creating an Effective Message - awareness, interest, desire, and action Call to Action - drive traffic to the website, social media channels, etc. Monitor & Measure - analysis of the placement's effectiveness <p>Digital advertising promotes awareness of outdoor recreation, spectacular nature and</p>	<p>According to researchers at Marketing Land (marketingland.com), these are the key reasons for why DMOs should invest in digital advertising:</p> <ol style="list-style-type: none"> Digital Advertising Drives ROI Digital Advertising Enhances The Effectiveness Of Non-Digital Media Channels Digital Advertising Is Effective Across The Entire Customer Journey Digital Advertising Drives Word-Of-Mouth At Scale Digital Creative Drives Interaction & Lifts Brands Digital Advertising Is More Efficient Than Traditional Media Digital Advertising Is Essential To Reaching An Audience Digital Advertising Is Even More Effective Than We Know 	<p>For all marketing efforts, the entire "Journey" through the visitation phases will be analyzed: acquisition (what are we doing to attract the visitor - advertising message), behavior (what direction does the messaging take them), and outcomes (what was the impact to the region). Since the main call to action will be to drive audiences to the website, we will use the following metrics for digital campaigns:</p> <ol style="list-style-type: none"> Estimated Impressions v. Actual Impressions Clicks Click Through Rate (CTR) 	<p>Digital marketing not only has the ability to produce a high ROI, it helps enhance other forms of marketing. Studies have found that digital advertising helps drive perceptions, raises brand awareness and can have as narrowwide a reach as marketers want. For YC, our digital marketing strategy is to reach a very targeted audience based on a specific activity, and then executed in conjunction with social media and print media efforts.</p>	\$504,853.00	<p>Yes, we met our objective. Yes, we will continue to use this method. We found digital advertising to be very successful during Fiscal Year 2019. Though there were portions of the strategy that did underperform as compared to past campaigns, we balanced those out with other sectors that over performed. This will be discussed in more detail below. We will continue to use Digital Advertising as a large portion of advertising for YC during FY20 and into the future.</p> <p>In our plan to measure success we outlined a number of KPIs to track success:</p> <ol style="list-style-type: none"> Estimated Impressions v. Actual Impressions Clicks Click Through Rate (CTR) Cost Per 1,000 Impressions (CPM) Cost Per Click (CPC) <p>Evaluations Below -</p> <p>Estimated Impressions vs. Actual Impressions: Our digital strategy yielded 59,414,947 impressions on 44,830,399 estimated impressions at the onset of the plan for 14,584,548 added-value impressions. For reference, the FY18 digital strategy yielded 40,175,192 impressions, of which 7,899,762 were added value.</p> <p>When social media ad buys are included, those numbers jump to 65,672,192 actual impressions vs. 48,605,399 estimated impressions, making 17,066,793 added-value impressions.</p> <p>Clicks: Our digital strategy yielded 170,015 clicks over the course of the year, which was down from 228,958 clicks in FY18. The largest culprit in click reduction was the Winter Network Programmatic Campaign. While it produced over 10M impressions, the number of clicks were reduced by a significant margin. We attribute some of this decline to a change in our account team with the platform the</p>	No	No	YCM FY19 Media Performance Final.pdf

			<p>charming small towns in Montana's Yellowstone Country region. The primary seasonal focus is winter, followed by warm & shoulder seasons. This campaign includes a national focus, as well as placement in regional drive markets to push seasonal travel and metro areas with direct flights.</p>	<p>4. Cost Per 1,000 Impressions (CPM) 5. Cost Per Click (CPC)</p>		<p>buy is placed with, as well as the FY18 buy overperforming by an unsustainable rate. We expect the FY20 buy for the same platform to fall somewhere in between those numbers in terms of total clicks on the creative and ads which would fall in between an overperformance in FY18 and an underperformance in FY19.</p> <p>All other placements were right in line or improved from number of clicks in years past. Additionally, when including social media ad buys as well, our total clicks jump to 250,383 for FY19.</p> <p>Click Through Rate (CTR): Our benchmark CTR is 0.06% and the Google Display Benchmarks-Spring 2017 delivered an average CTR of tourist destination campaigns of 0.12%. The FY19 YC digital campaign yielded a CTR of 28.6%. When social media is included, our CTR jumps to 38%. As stated with the number of clicks from FY18 in the above evaluation, that number of clicks pushed the FY18 numbers to 57%, which we believe to be an anomaly as opposed to the norm due to the high-amount of digital advertising currently taking place.</p> <p>Cost Per 1,000 Impressions (CPM): Our FY19 digital strategy was able to bring down our CPM cost to \$8.48 as opposed to a mark of \$10.20 during FY18. This change was due to our overperformance in our number of impressions served.</p> <p>Cost Per Click (CPC): Our benchmark CPC is \$4.00 and our FY19 strategy delivered a \$2.22 CPC over the course of the fiscal year. This is up from a \$1.84 mark during FY18, but again, that was due to a high number of clicks from the FY18 Winter programmatic ad buy that is an anomaly. We would expect to see a mark somewhere in between these two numbers in FY20.</p> <p>Creative for digital campaigns can be found here: https://www.dropbox.com/sh/d154v8c2f918c1AABHkKwSZ-wNtrbK79VwqTa?dl=0</p>					
Consumer	Print Advertising	Yes	<p>The strategy for print advertising is to place highly targeted advertorial and/or display content in key publications that reach a specific audience. Examples: Skiing, snowmobiling, lifestyle publications.</p> <p>Advantages of print media advertising:</p> <p>Specific Target Audience:</p> <p>In print media, the advantage of catering to specific target audience opens up countless opportunities for reaching the audience. There is a greater efficiency in resources, as ads reach the target audience.</p> <p>Loyal Readerships:</p> <p>In the print media industry, readership is mostly longstanding and loyal.</p> <p>Special Ad Positioning:</p> <p>A major advantage in magazine advertising is that an advertiser can request special ad positioning, bringing greater visibility to the brand.</p> <p>Credibility:</p> <p>Over a period of years, magazines create a vast pool of loyal readers who feel safe in its very credible environment.</p> <p>Long Life Span:</p> <p>Compared to websites or national newspapers, magazines enjoy the longest life span. Some magazines (Nat Geo) are treasured across decades.</p> <p>High Reach Prospective:</p> <p>Another advantage is that magazines have a high reach prospective. Magazines pass from family, friends, colleagues, etc.</p> <p>Glossy Ads:</p> <p>These are usually trend setting and eye catching. Maximum visibility is reiterated through magazine advertising.</p>	<p>The primary objective for print advertising is to raise brand awareness. To measure success, we will be looking at overall metrics such as website visitation, social media engagement, call center activity and requests for additional information.</p>	<p>Print advertising provides an opportunity to really "showcase" brand/destination awareness.</p> <ol style="list-style-type: none"> 1. Making an "active" brand introduction to potential first-time visitors to the region and/or state. 2. Reinforcing the brand message by "reconnecting" with return visitors to show that there are always more, or different, experiences to be found on return visits. 	\$140,000.00	<p>Yes, we met our objective. Yes, we will continue to use this method, because the results show it is still a viable source of advertising:</p> <p>The FY19 print strategy did a lot to raise awareness of the Yellowstone Country brand. The goal to measure that success was to include website visitation numbers, social media engagement, call center activity and requests for additional information.</p> <p>All of these metrics improved during FY19, though they cannot all be attributed to the print strategy alone. Each one of those sectors has its own strategy, but the FY19 print strategy aided in these efforts.</p> <p>Website traffic, call center activity and social media engagement were all up from FY18.</p> <p>Additionally, while the tearsheets and print reach are all bundled together at the Dropbox link below, some of these placements were technically used in the Joint Venture budget line item due to our cooperative partners all being bed-tax funded entities and/or MOTBD and some were in the Consumer Advertising-Print budget due one or more partners being private entities.</p> <p>The Joint Venture publications were: Glacier Country Travel Guide Destination Missoula Travel Guide Southeast Montana Travel Guide Red Lodge Travel Guide West Yellowstone Travel Guide Master Skier Cross-Country Ski Journal Powder Magazine SKI Magazine (November, December) Texas Monthly (November) San Diego Magazine (November/December) Brand USA Inspiration Guide</p> <p>Please see attached report for print reach numbers.</p> <p>All FY19 Print tearsheets can be found at: https://www.dropbox.com/sh/gdxzn05xu762z11AAAYKgP0LKIOP-HATKHk8HRa?dl=0</p>	No	No	Print Reach.xlsx	
Consumer	Photo/Video Library	Yes	<p>Using visual content across marketing methods provides an opportunity to help visitors conceptualize the type of experience they can have, and help them differentiate Yellowstone Country from other DMOs.</p> <p>Great imagery and video content helps to build brand awareness, as people are more apt to share information that includes these elements. The FY 18 emphasis was on obtaining imagery/video to enhance media campaigns through an integrated approach. Our strategy is to use the</p>	<p>http://www.steamfeed.com/visual-content-will-rule-digital-marketing-2014/ https://www.thinkwithgoogle.com/articles/youtube-insights-stats-data-trends-vol10.html http://blog.hubspot.com/blog/tabid/6307/bid/3342319-Reasons-You-Should-Include-Visual-Content-in-Your-Marketing-Data.aspx</p>	<ol style="list-style-type: none"> 1. Reduction in leased, limited usage fees. 2. Increase in YC "stock" videos & images that can be used broadly for both advertising and marketing. 	<p>We continue to build our image and video library as we integrate our website content with our print and digital marketing. Owning these assets is a less expensive option than limited usage contracts, and allows for more flexibility in how the assets are used.</p>	\$30,000.00	<p>Yes, we met our objective. Yes, we will continue to use this method, because the results show it is still a viable source of digital advertising & allows us to leverage a limited asset budget.</p> <p>Yellowstone Country made every effort to purchase lifetime and limitless rights to photo and video purchases during FY19. Aside from the occasion in which the price to purchase lifetime and limitless rights were above and beyond where we were comfortable to purchase, all other photos and video were purchased this way.</p> <p>Many of these photo purchases have been used in a number of marketing methods and campaigns, including:</p> <p>Yellowstone Country Website Yellowstone Country Social Media Yellowstone Country Print Advertising Yellowstone Country Promotional Items Yellowstone Country Travel Guide (FY20) Yellowstone Country Email/Electronic Marketing Yellowstone Country Joint Ventures Yellowstone Country Media Outreach Events</p> <p>Additionally, we worked image rights into our blogger/influencer/travel writer contracts when appropriate to be used for advertising and social media campaigns as well.</p> <p>Photo/Video purchases for FY19 attached. Not included are photos that were procured as part of our influencer campaigns.</p>	No.	No	FY19 Photo Video.xlsx

following guidelines for all visual content:

1. High quality beauty images & videos that depict what makes the region so spectacular
2. Engaging imagery that shows the audience possible experiences: dining, recreation, arts & culture, etc.
3. Leveraging visual content for SEO purposes

Consumer Website/Internet Development/Updates

Yes

This segment encompasses multiple components of website work.

1. **New website development.** The primary objective in FY17 was the conceptualizing and development of a new website. This included a complete reimagining of website structure, functionality and messaging.
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 paid and earned channels.
3. **Site management & maintenance.** Website management and maintenance includes electronic database creation and maintenance, regular photo/video updating, website performance tools & reports, adding to media & content libraries, link review & changes, testing & troubleshooting, training & technology assistance, and interfacing with MTOT and other tourism related organizations.
4. **Future planning.** Develop plans for future website components / functionality to ensure the website provides value to users over time.

<https://www.theedesign.com/blog/2014/why-you-should-update-your-website-regularly>

<https://www.nexttlywebdesign.com/update-website-content/>

Constituent feedback regarding website experience.

Positive growth in unique and repeat visitors.

Increased goal conversions (requests for further information).

Our primary goal is to establish a branded web presence that compliments and strengthens the efforts in all marketing channels. The website serves as a resource/planning tool for both first-time and return visitors, so keeping content updated and "fresh" is a key component.

\$50,000.00

Yes, we met our objective. Yes, we will continue to use this method, because the analytic results show it is still a viable support resource for our marketing efforts.

The YC website made great strides in FY19. Although we fell short of reaching our targeted goal of 450,000 unique visitors, we did increase our total by 124,138 from FY18, a 41% increase during the fiscal year.

Below you can find some additional statistics about website traffic and usage. For a monthly retainer of \$4166.67, at the FY19 rate of \$60 an hour, YC should average 69.44 hours per month through its agency of record. As you can see on the attached task list, there were many months with a significant increase in those hours.

In addition to the full report below, the YC added 4,632 leads to our pool from travel guide requests.

YELLOWSTONE COUNTRY FY19 WEBSITE REPORT

TOTAL UNIQUE VISITORS: 422,125 (FY 19 TARGET 450,000) (FY20 TARGET 525,000)

Core Website Audience Statistics

FY18	FY19
Unique Visitors 297,987	Unique Visitors 422,125
FY 18 Target 400,000	FY 19 Target 450,000
Social Refers 11.6% (20% Goal)	Social Refers 15% (20% Goal)
Winter Focused 91,750 (150,000)	Winter Focused 145,202 (150,000)
Summer Focused 81,120 (120,000)	Summer Focused 121,773 (120,000)
Annual Focused 125,117 (130,000)	Annual Focused 155,150 (180,000)

Geography

FY18	FY19
CALIFORNIA	CALIFORNIA
TEXAS	ILLINOIS
ILLINOIS	TEXAS
WASHINGTON	NEW YORK
PENNSYLVANIA	MONTANA
NEW YORK	OHIO
MONTANA	GEORGIA
OHIO	WASHINGTON
MINNESOTA	OREGON
FLORIDA	MINNESOTA / PENNSYLVANIA

Gender

FY18	FY19
FEMALE 52.9% MALE 47.1%	FEMALE 51% MALE 49%

Age

FY18	FY19
55-64 20%	18%
45-54 20%	18%
35-44 20%	22% +2%
25-34 16%	18% +2%
18-24 13%	14% +1%
65+ 7%	9% +2%
Unknown 4%	Unknown 1%

Device Preferences

FY 18	FY 19
Mobile 50%	52%
Desktop 41%	38%
Tablet 7%	5%
Other 2%	5%

ENHANCED GEOTARGETED MARKETS PER MARKETING PLAN

FY19 MARKET	12 Month Response Variance
DENVER	+37%
LOS ANGELES	+40%
SAN FRANCISCO	+36%
SALT LAKE CITY	+53%
PHILADELPHIA	+6%
SEATTLE	+40%
PORTLAND	+32%
ALBERTA	+58%
SASK.	+48%
BC	+59%
MINNEAPOLIS	+43%
DALLAS	+13%

No

No

YCM1_WebsiteTaskList_FY19.xlsx

			thereby reducing the cost of that publication significantly.			Highlight off the beaten path communities, attractions, State Parks, trails, recreation areas and more. Inspirational content and photos					
Consumer	Electronic Adv - Newsletter, E-blast	Yes	Direct marketing campaigns will be highly targeted and integrated. Email marketing will allow YC to build relationships by providing the right information at the right time directly to people who already have made a connection to the region. We will use informative content & great imagery for inspiration - and to depict an experience.	https://blog.bufferapp.com/8-effective-email-strategies-backed-by-research https://www.forbes.com/sites/stevecolenski/2014/09/26/email-marketing-most-effective-mobile-marketing-most-difficult/#3249ec59c2b https://www.hmc.com/peter-roesler/study-shows-email-marketing-still-popular-and-effective-with-millennials.html	YC will use one/more of the following KPIs to analyze & measure the success of direct email campaigns: 1. Click Rate 2. Conversion Rate 3. Unique Open Rate 4. Unsubscribe Rate 5. Bounces 6. Site Traffic	Email is effective because it's permission based. The people on our email list have opted in to receive messages. Email marketing makes sense because it's usable on multiple devices and we can include social media, online video and other marketing elements all within content-rich marketing message.	\$28,000.00	Yes, we met our objective. Yes, we will continue to use this method, as digital/electronic outreach is still a vital supporting piece for our marketing efforts. We outlined the following as measures of success for FY19. While our numbers are not outstanding in any front, we believe email marketing to still be an integral part of an overall marketing campaign. 1. Click Rate Our click rate during FY19 fell below the industry standard of 1.7% at 0.35%. We have looked at adjusting our template to help enhance this rate in FY20. 2. Conversion Rate Total actual opens as they relate to clicks to the website is 8.8%. Industry standard 2.35% in terms of opens to web traffic generated - source https://www.wordpress.com/blog/ws/2014/03/17/what-is-a-good-conversion-rate . YC would place in the top 25% in the industry with this performance. :) 3. Unique Open Rate The industry average for Open Rate is 14.5% while FY19 campaigns averaged 15.0% over 19 email blasts. Of our successful 692,000 deliveries there were 111,362 unique opens to reach that number, with 140,711 total opens over the same span. 4. Unsubscribe Rate Our unsubscribe rate for FY19 sat at .38 percent on 692,000 deliveries over the course of the fiscal year. The numbers continued to fluctuate based on inclusions of new leads from different cooperatives and readers services, as we will always have an uptick in unsubscribers after adding more people to the contact list. 5. Bounces FY19 saw a total of 10,343 total bounces on 701,428 total recipients for a bounce rate of 1.47%. 6. Site Traffic YC web traffic increased total by a total of 124,138 unique visitors in FY19 as compared to FY18. The top 5 blogs as part of the email marketing campaigns had a combined total of 7,981 unique page views.	No	No	FY19 EM.csv
Consumer	Multi-Media Marketing		Cooperative advertising partnerships with private/public sectors TBD. Projects will be identified and implemented for specific target geographic and demographic markets and may include any/all of the following: television, video, print, internet, radio and display advertising.	See supporting research in advertising sections above.	As with all advertising, co-ops can be evaluated based on performance reports.	Yellowstone Country can measure success (from a top-level view) by taking into account the additional marketing reach for the region, in addition to the positive impact the region has on smaller entities. Each co-op can be tracked and monitored with media performance reports, making it easy to identify direct impact.	\$0.00	Yes, we met our objective of implementing multi-media projects in our marketing mix-however, these funds were moved to other Consumer Advertising project budgets to accomplish that objective. Yes, we will continue to use this method--multi-media campaigns are very relevant; we just moved them under the specific methods for which they relate. For example: if we did a multi-media campaign that was primarily digital, but had a small print component, we did that placement under the Online/Digital budget instead of under the Multi-media method.			
Marketing Support	Administration		The Administrative budget is the operations budget that allows us to pay wages, operate an office, buy equipment & conduct business as an organization.	https://bizfluent.com/info-7747915-administrative-budget.html https://www.myaccountingcourse.com/accounting-dictionary/general-administrative-expense-budget	We will measure success by carrying out the common operations functions typically found in the administrative budget line items:	The administrative or administration budget is the amount of money it takes to run our company. It's defined in accounting as the part of the annual budget that is related to implementing & maintaining all normal business operations. Some common examples: <ul style="list-style-type: none">• Building rent or mortgage payments.• Consulting expenses.• Salary and benefits for the C-suite executives and their supporting staff• Depreciation on office equipment.• Insurance premiums.• Wages and benefits for the accounting department.• Your legal bills, whether you hire an outside attorney or use in-house staff• Office supplies.• The costs of bringing in an auditor.• Utilities.	\$205,000.00	Yes, we met our objective of implementing the annual operations for the organization. Yes, we will continue to use the Administrative segment; as an organization, we must have an operations budget to carry out the purpose of the org. The admin budget is used for operations, including (but not limited to) office management, wages, training/professional development, etc. All operations are a supporting function for the purpose of YC, which is to market the region as a destination.	No	No	
Marketing Support	Opportunity Marketing		OPPORTUNITY marketing projects will be identified & implemented for specific target psychographic, geographic & demographic markets. This would include cooperative marketing partners with private and/or public partners that meet the overall goals, objectives & strategies identified in YC's marketing plan.	http://www.nonprofitmaine.org/wp-content/uploads/2013/03/Operating_Reserves_and_Policy_Examples.pdf According to business articles, non-profits should have an Opportunity/Reserve Fund budget. In the case of a MT tourism region, we are allowed to use the Opportunity Funds for projects that come our way during the course of the year (with approval from TAC) or that are identified after the marketing plan has been approved.	If YC does an Opportunity project, success will be measured by evaluating whether or not the objectives for the specific project are met.	Opportunity Projects are occasionally identified by this organization as available for us; if that is the case, said projects are submitted for approval to the TAC & then implemented. We do not plan for any specific number of Opportunity projects, but if any are done, they will each have their own measurable objectives & plan to measure that success.	\$100.00	Yes, we met our objective to set aside some funds for potential Opportunity Funds. However, no FY 19 Opportunity projects were implemented. Sometimes there are more than we feel are a good investment of the limited Opportunity Funds, as was the case for FY 18. Yes, we will continue to use this method, as it allows us the avenue for reacting to, and participating in, potential projects that come up during the course of the year.	No	No	
Marketing Support	Fulfillment/Telemarketing/Call Center	No	This budget supports distribution of YC's printed materials to both resident and non-resident visitors. This would include shipping, postage and the call center. As the primary means of distribution to both regional outlets and identified out-of-state hubs, YC contracts with Certified Folder Services and CTM to distribute travel planners and scenic maps. These facilities store the YC travel planners & fulfill bulk order requests, and stock the planners in	In relation, Montana Office of Tourism in past research reporting of its own showed as high as 30% increase in visitation from travelers able to make contact with the call center or visitor information resources live or via live chat. The call center provides a time tested resource to receive inquiries and visitor/campaign results opportunities and manage that information into global campaign research on effectiveness but also future adjustments to the brand, marketing campaigns, advertising creative, public relations, and much more. The call center is an integral service piece to the overall marketing program YCM and has allowed for significant improvement in reporting, fulfillment, processing time, and capturing visitor data essential to helping build a successful marketing strategy for the region.	Distribution of the travel planner and map are tracked & analyzed. This includes distribution to out-of-state locations on Certified Folder routes and CTM routes, in-state rest areas, Yellowstone, the 10 regional VICA, local Chambers and as a fulfillment piece for direct inquiries to the call center, guest book sign-ups on the website and consumer advertising campaigns.	Fulfillment is a necessary support function for all the marketing programs. Printed materials distribution, call center functionality, shipping and postage are all integral parts of running the business.	\$85,000.00	Yes, we met our objective. We will continue to use this method, as fulfillment for printed publications is an essential function. We fulfilled a number of requests directly through our call center and worked with Certified Folder and CTM in display boxes around the U.S. We also shipped boxes directly for requests for both the travel guide and the scenic road map. Numbers dwindled towards the end of FY19 as we were running out of travel guides because they are only produced every other year, with FY18 being the second year of that two-year span. 240,000 guides were produced in FY18 and those were all gone by the end of FY19. New guides were printed in early FY20. Call Center Information: -State Inquiry can be found here: https://www.dropbox.com/s/e388e76b02dkw4x/FY%2019%20Y%20State%20Report.pdf?dl=0 -Ad code inquiry can be found here: https://www.dropbox.com/s/skdb12pwwzkt/FY%2019%20Y%20Ad%20Code%20Report.pdf?dl=0 -Total numbers of leads generated/processed in FY19: 40,473 -Total leads from website guide requests: 4,632 -FAQs can be found in the 2018 and 2019 google sheets: 2018: https://docs.google.com/spreadsheets/d/1K8OM6zK2HcE-mXQ1KhaKz74xm6m-Igf9HISD0V4E/edit#gid=40442368 2019: https://docs.google.com/spreadsheets/d/1s3OCEGAZFVHknokB1DFeUpB10JH6DZHDVDZTEuo/edit#gid=0	No	No	

eligible rest areas and
brochure racks.

Travel Guide Certified Folder Fulfillment Numbers - Missoula Warehouse Remaining Numbers:

July 2018 - 58140
August 2018 - 42300
September 2018 - 15660
October 2018 - 13650
November 2018 - 7650
December 2018 - 6120
January 2019 - 3780
February 2019 - 1000
March 2019 - 100
April 2019 - 2880 (Remaining inventory from storage at Montana Transfer moved to warehouse).
May 2019 - 1170
June 2019 - 100

Travel Guide CTM Media Group Fulfillment Numbers - Regional Warehouse Distribution Numbers:

Berkshires Warehouse

2019 February -90
2019 May -90

Stamford Warehouse

2018 July 5,580 - Delivery
2018 July -180
2018 August -90
2018 September -180
2018 October -360
2018 November -90
2019 February -90
2019 April -90
2019 May -1,080
2019 June -1,800

Atlanta Warehouse

2018 July 2,520 - Delivery
2018 July -90
2018 October -90
2018 November -180

Chicago Warehouse

2018 July 7,650 - Delivery
2018 July -360
2018 August -90
2018 September -180
2018 October -180
2018 November -270
2018 December -180
2019 January -270
2019 February -270
2019 March -90
2019 April -90
2019 May -3,600
2019 June -90
2019 July -90

Minneapolis Warehouse

2018 July 5,580 - Delivery
2018 July -1,260
2018 August -1,530
2018 September -1,710
2018 October -900
2018 November -180
2018 December -90
2019 May -1,080
2019 June -990

Philadelphia Warehouse

2018 August -180
2018 September -270
2018 October -180
2018 November -90
2019 February -180
2019 March -90

Washington Warehouse

2018 July 2,430 - Delivery
2018 August -90
2018 October -270
2018 December -540
2019 January -90
2019 February -90
2019 April -90
2019 June -90

Yellowstone Country Map Shipments - July 1, 2018 - June 30, 2019

Date	Qty	Destination
7/3/2018	1 box - 360	Glasgow, MT
7/19/2018	2 boxes - 720	Jackson Hole, WY
7/26/2018	8 boxes - 6 @ 360 ea + 1 @ 285	Windfall Office
7/26/2018	12 boxes - 5520	Windfall Office
8/3/2018	6 boxes - 2760	W Yellowstone, MT
8/6/2018	1 box - 460	Cooke City, MT
8/23/2018	6 boxes - 2760	W Yellowstone, MT
8/24/2018	2 boxes - 920	Billings, MT
8/31/2018	5 boxes - 2300	Gardner, MT
9/13/2018	1 box - 460	Cooke City, MT
9/28/2018	2 boxes - 920	Livingston, MT
11/1/2018	1 box - 460	Wausau, WI
11/27/2018	6 boxes - 2760	W Yellowstone, MT
3/21/2019	1 box - 460	Big Timber
5/10/2019	1 box - 460	Billings, MT
5/23/2019	6 boxes - 2760	W Yellowstone, MT
5/23/2019	4 boxes - 1840	Big Sky, MT
5/28/2019	1 box - 460	Ogallala, NE
5/29/2019	1 box - 460	Wibaux, MT
6/14/2019	1 box - 460	Coeur d'Alene, ID
6/18/2019	5 boxes - 2300	Windfall Office
6/20/2019	8 boxes - 3680	W Yellowstone, MT
7/2/2019	3 boxes - 1380	Rapid City, SD
7/8/2019	2 boxes - 920	Billings, MT
7/8/2019	2 boxes - 920	Gardner, MT
7/10/2019	1 box - 460	Coeur d'Alene, ID
7/25/2019	1 box - 460	Coeur d'Alene, ID
7/26/2019	1 box - 460	Big Sky, MT
7/29/2019	6 boxes - 2760	W Yellowstone, MT

Windfall Fulfillment - Travel Guide + Map (Travel Packet)

Direct Requests - Here: https://www.dropbox.com/sh/obifsal6ht7sdbkx/AAAxn4of6_ZPvGokTgihOda?dl=0
Breakdown below

Pieces	Date
240	7/3/18 22:20
623	7/19/18 22:28
240	7/24/18 22:26
300	8/1/18 22:05
328	8/21/18 22:26
200	10/25/18 22:08
252	12/4/18 23:14
201	1/8/19 23:09
300	2/13/19 23:27
266	3/20/19 22:11
339	5/10/19 22:07
1580	6/7/19 22:05
240	6/17/19 22:30
794	6/27/19 22:27
5903	Total

We did not have enough requests to fill the bulk mail requirements (200) in September 2018, November 2018, April 2019.

Marketing Support	VIC Funding/Staffing/Signage	<p>The regional VICs are a vital component of YC's efforts to entice travelers to visit, stay longer, and do more while in Montana. The number of travelers stopping at regional VICs is significant; many people are stopping at community VICs as they move through the state, not just at the main entry points. VIC travel counselors cite that visitors often indicate they find the first-hand information they receive at the centers to be the most valuable travel resource once they are in the area. This program allows chambers the opportunity to operate more hours, employ travel counselors who are trained & knowledgeable about the region, and to provide information assistance. More and more visitors use the internet for trip planning; however, once on the ground, they want to have local knowledge and interaction to help them have the best experience possible.</p>	<p>The total # of visitors assisted during the FY 17 funding period (Memorial Day weekend-Labor Day 26) increased 15% over the same timeframe the previous year, serving 300,000+ visitors in the 10 regional VICs. NOTE: The actual number of visitors served may be much higher, because the BZN airport does not have a counting mechanism, so the #'s are extrapolated from visitor guides distributed at the airport VIC</p> <p>http://scholarworks.umt.edu/cgi/viewcontent.cgi?article=1044&context=itrr_pubs</p>	<p>Primary objective for this program is to provide information services to the visitors both before and after arrival. VICs are a key component for all three phases of trip planning, especially the orientation & facilitation phases.</p> <p>Visitor numbers and satisfaction are key performance/success metrics in helping determine each year if funding the VICs are a viable use of marketing dollars. YC analyzes the VIC report provided by each participating entity annually, and uses that information & data to set the guidelines for the program, as well as to help determine target geographic demographic markets.</p>	<p>The VIC program is an integral part of YC's overall marketing effort & continues to be very successful. <i>Tourist information center acts as one of the most important communication channels with which to attract and educate travelers about the benefits of visiting the state.</i></p> <p>VICs provide key support for visitors to the region by offering a variety of services and support both prior to travel to the destination and once they arrive. In essence, VIC staff as both an information source, and as an influence--they can have an impact of travel plans from the beginning planning stage through to the actual trip experience.</p>	\$120,000.00	<p>Yes we met our objective, which was to provide funding for VIC staffing at each of the VIC in the region so visitors have an actual on-the-ground resource. We will continue to use this method, as the VICs fulfill a vital function to the visitor experience.</p> <p>Visitation to the funded VICs was up 1.5% over the #'s reported in 2018. Of the 4 VICs that were down a little in visitation, the most prevalent reason cited was weather. For example, the Beartooth Highway was closed off & on throughout the end of May-first week of June. A wet, cold spring was cited by several, which tends to bring down visitation #'s. Of the ones citing increases, they attributed it to larger group sizes. Most reported trends of seeing larger groups coming, and increased length of stays for families.</p> <p>There was a slight change in the order of Top 15 states where visitors to the VICs (and the region overall) come from, but the origins hold true to what we see: most of the visitors are coming from surrounding state (drive/fly markets) and places where we have direct flights from BZN.</p> <p>We continue to see the value in funding the VICs. They are an integral part of the visitor experience, throughout all travel phases.</p>	No	No	VIC Completion Top 15 states Summary FY 19.doc
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- Help define how best to advertise to the target market
- Help define our competitive edge

Party Sizes 1 (7) 2-3 (31) 3-4 (23) 5+ (20)	1 (1) 2-3 (33) 3-4 (30) 5+ (26)
Lost out to UT – CANADA – WY – CA – CO	Canada – Colorado – Alaska
Why? Distance – Currency – Airfare	Why? Availability – Cost – Fire Concerns

New this year:

Visitor Guide Utilization 56/ 90
 Website Utilization 80/90
 Social Channels 26/90

- + All positive reviews on visitor guide thus far – really positive on maps when mentioned.
- + All positive on website (more photos – more information on shoulder season things to do)
- + Negatives (want more ideas on things to do, more kid friendly and pet friendly ideas.
- + Make website easier to find in search – still had some trouble finding the website and URL for the region.
- + Live helper was mentioned 4 times as a very positive customer service feature provided by YC. Thought we should promote it even more and make it easier to access.

Based on 500 Visitor Guide email based completed surveys. (3,012 sends)

FY18	FY19
Visitor Guide Received YES 448 NO/? 52	Visitor Guide Received YES 496 NO/? 4
Visitor Guide Helpful YES 412 NO 36	Visitor Guide Helpful YES 483 NO 13
Visitor Guide Mailed Condition When Received Good 442 Bad 6	Suggestions for Visitor Guide: <ol style="list-style-type: none"> 1. Deals and offers for lodging/experiences 2. Itinerary suggestive content 3. Native American content 4. Diversity in photos / images Feedback: <ol style="list-style-type: none"> 1. Loved photography 2. Great feel for the region from the copy provided. 3. Great maps 4. Lots of information they did not have prior. 5. Loved the attention spent on seasons and small towns. 6. So much more to experience in the region beyond Yellowstone Park!

Based on 50 map recipient completed surveys (539 sends)

FY18	FY19
Not surveyed in 2018	Map received? YES 47 NO/? 3
	Map helpful? Very 43 Somewhat 4 No 0
	Map suggestions / feedback? <ol style="list-style-type: none"> 1. Loved the foldable format 2. Very easy to use 3. Map was helpful on the vacation 4. Clearer identification of airports 5. Information on border crossings?? 6. Weather information 7. Wyoming information?

Dallas Inquiry Survey - 50 Completed Calls (149 attempts)

FY18	FY19
N/A	Visited Yellowstone Country - 43 YES 7 NO
	Texas origin of YES Dallas 30 Houston 6 Austin 2 San Antonio 1 Other 4
	Season - Summer 18 Winter 13 Spring 6 Fall 6
	Positive Experience - VERY 40 SOMEWHAT 3 NO 0

General Feedback –
<ol style="list-style-type: none"> 1. Direct flight was a major factor in decision to area. 2. Great ski trip to Big Sky 3. Wanted to stay in Bozeman and did day trips across region. 4. Came via Billings and into Red Lodge and YNP. 5. Landed in Missoula and wanted to do Glaciers to Geysers route. 6. Camping and hiking outside the park. 7. Loved Gardiner and West Yellowstone communities. 8. Positive feedback on the people and employees at destinations. 9. Concern about weather conditions 10. Bozeman airport was a positive experience 11. One call mentioned reading a local blog on the direct flight as the first time they heard about it – always wanted to visit Montana. 12. One visitor felt outfitter and guide pricing was high relative to experience and service was just ok. Did not want to share names. 13. One visitor complained about signage but was unclear on routes traveled. 14. Four visitors mentioned the call center as playing a role in travel planning and that it was a positive encounter. 15. Seven visitors mentioned they requested the visitor guide on the website and were pleased with the information and turn-around time. 16. One visitor discussed the map on their vacation as a very useful tool.

			<p>Website traffic from our blog is on track to generate 37% more visits than FY18 with 19,935 visits. Topics of interest align with the popular content in our regular social media posts.</p> <p>In FY18, we put an additional focus on Facebook Live and other videos. This strategy increased both video views and minutes viewed by over 150%. Video views totaled 548.8K and minutes totaled 177.3K. Facebook Live contributed 24,457 of total minutes and 65,400 video views.</p> <p>Yellowstone Country hosted nine social media influencers this year, which brought us a significant amount of exposure. We will continue to invite relevant influencers with unique angles to visit our area and share their experiences via their social media channels and blogs.</p> <p>This growth indicates our mix of unique content, live stream and video is proving to be extremely effective. In FY19, our plan is to increase our presence in both of these areas. We are investing in a tripod, gimbal and audio equalizer which can be utilized to stream and record events across the region. CVB directors, board members and other tourism stakeholders are collaborating to attend events and generate content. This strategy is also intended to interest a younger demographic through Instagram Stories and other potential platforms such as Periscope.</p> <p>Our blog posts will increase to weekly with more emphasis on profiles of the people and businesses in Yellowstone Country, scenic drives, unique activities and local events.</p> <p>The change in Facebook's algorithm in FY18 to focus on interactions between family and friends versus business pages has prompted us to increase our budget to promote posts. This has been a successful strategy thus far, indicating we should continue and have included a monthly allocation of \$500 to continue in FY19.</p>				<p>https://www.dropbox.com/sh/kbq2m5hok41hmc/AAB8B7n8X3og9TL0xYEzR3-6a?dl=0 https://www.dropbox.com/sh/lpw0m3uaw7bi2us/AADTYFDCvrmVDRp9w0gBqra7dl=0</p> <p>Paid social media traffic and performance is shown on the attached performance report.</p>			
Publicity	PressTrips	Yes	<p>Following each outbound press event, YC evaluates attendees and reaches out to a select group to explore the region. Travel writers and social influencers are hosted on a variety of trips - spanning from individual trips to group trips - with custom itineraries and activities depending on each unique audience.</p>	<p>From our outbound press trips, we have hosted inbound journalists with arrangements, complimentary services & goods and regional guides, at little to no cost to the region. These journalists were on assignment or freelancing stories regarding outdoor recreation activities, which is the primary focus of YC marketing campaigns. These included: whitewater rafting, golfing, fishing, hiking, mountain biking, camping, bird watching, Nordic & alpine skiing, snowboarding, ice climbing, snowmobiling and wildlife viewing in Yellowstone National Park.</p> <p>The objective is to increase brand awareness through storytelling.</p> <p>We can measure success through publicity values, but also through the following:</p> <ul style="list-style-type: none"> • Did we reach the target audience? • Did it build awareness of our destination and/or specific activity? • Reach & social engagement • Lead generation by content, channel, and initiative • Quantity & quality of coverage • # of articles produced 	<p>Working with the media is an important way for Yellowstone Country to tell our story; it helps personalize the experience for visitors and supports consumer advertising campaigns. This is part of the inspiration phase, but also serves a purpose as part of the orientation phase.</p>	\$34,500.00	<p>Yes, we met our objective. Yes, we will continue to use this method. Hosting travel media is a viable way to reach our target audience.</p> <p>We hosted 7 writers/influencers in FY19, that thus far have completed 18 articles on Yellowstone Country, including a number of social media posts, pins on pinterests and other drivers.</p> <p>The full influencer output is attached.</p> <p>We listed the following as how we measure success:</p> <ol style="list-style-type: none"> 1. Did we reach the target audience? Yes. We specifically targeted family travel (Shelley VanWitzenburg, Jeff Bogle, Colleen Padilla, Sarah Ricks, and Sarah Bond) hotel travel (Monique Burns) as well as craft beer enthusiasts (Reid Ramsay). In addition, all of these writers were based and had readership in one of targeted geographic areas. We had two other planned travelers that had to cancel due to a scheduling conflict and a family emergency. 2. Did it build awareness of our destination and/or specific activity? Though this is not always easy to tell, we definitely fell as though this did. We used a number of different avenues to tell YC's story, including winter and warm season content. 3. Reach & social engagement? These writers all had a large engagement, including some with over 100,000 following on certain channels and over 200,000 monthly visitors on pinterest. Their reach and engagement numbers are part of why we wanted to work with them. 4. Lead generation by content, channel, and initiative? This is still to be determined as we can only track this so much at this point. 5. Quantity & quality of coverage: The quantity as with all ventures is better with some than others but we have been impressed with the quality of work produced thus far. Many of these writers created their own itinerary from their experience to showcase to their readership how easy planning and facilitating a trip to YC can be. 6. Number of articles produced: We hosted 7 writers/influencers in FY19 that thus far have completed 18 articles on Yellowstone Country, including a number of social media posts, pins on pinterests and other drivers. <p>Additionally, we received photos from Jeff Bogle, Reid Ramsay, Shelley VanWitzenburg and Colleen Padilla to be used for future projects as well.</p> <p>Influencer output with hyperlinks attached below.</p> <p>A sampling of screenshots of social media/digital media from press trips can be found at:</p> <p>https://www.dropbox.com/s/pck448kedm649es/Screen%20Shot%202019-07-26%20at%209.08.14%20AM.png?dl=0 https://www.dropbox.com/sh/nf4djd1mf4fmb8AAazaZ2Jai_NgC059RA0Uca7dl=0 https://www.dropbox.com/sh/jube3j177m8n3ocAAACKW0da7Me-mhb2AJCDjsa7dl=0 https://www.dropbox.com/sh/kbq2m5hok41hmc/AAB8B7n8X3og9TL0xYEzR3-6a?dl=0 https://www.dropbox.com/sh/lpw0m3uaw7bi2us/AADTYFDCvrmVDRp9w0gBqra7dl=0</p>	No.	No	FY19 Influencer Output.docx

Reg/CVB Required Documents

Description

FY19 Required Documents

File Name

FY19 Yellowstone Country Required Documents.pdf

File Size

127 KB

