



## Grant Details

### 80683 - FY20 Region/CVB Marketing Plan

#### 86709 - FY20 Helena CVB Marketing Plan

#### DOC Office of Tourism

**Grant Title:** FY20 Helena CVB Marketing Plan  
**Grant Number:** 20-51-017  
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**Applicant Organization:** Helena Area Chamber of Commerce CVB  
**Grantee Contact:** Mike Mergenthaler  
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#### Contract Dates

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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?*

Helena, Montana, is much more than just the state capital; it is a vibrant community bordering some of the best recreation opportunities in Montana. Nestled against the Rocky Mountains and built by gold mining, Montana's capital city strikes a unique balance between having a rich history and being a lively arts and culture town. Surrounded by pristine mountain scenery, numerous rivers and lakes, clean fresh air, and an abundance of wildlife, Helena is a unique travel destination.

#### Identity of Helena - as identified by the Helena CVB

As a tourist destination, Helena offers the following strengths and resources:

- Arts and culture, such as Grandstreet Theatre, Montana Shakespeare Company, Great Northern Carousel, Holter Museum of Art, Myrna Loy Center for the Performing and Media Arts, Archie Bray Foundation for the Ceramic Arts, ExplorationWorks, Clay Arts Guild of Helena, Cathedral of Saint Helena, Carroll College, Queen City Ballet, Helena Symphony Orchestra and Chorale, and Civic Center events.
- Helena has received several designations that make it desirable to visitors, including International Mountain Bicycling Association Ride Center, Rand McNally Best of the Road for Geocaching, *USA Today's* 10<sup>th</sup> Best State Capital Worth Visiting, and many more.
- Helena is central to Montana history with historical attractions such as Montana's Museum at the Montana Historical Society, "Montana's Most Historic Mile" Last Chance Gulch, Original Governor's Mansion, Historic Mansion District, Reeder's Alley, nearby ghost towns, Gates of the Mountains, Lewis and Clark Trail, Montana Military Museum, Montana's State Capitol Building, and the Last Chance Tour Train.
- Outdoor recreation abounds with fishing, hunting, hiking, camping, boating, rafting, downhill and cross-country skiing, snowmobiling, mountain biking, golfing, and horseback riding. Visitors can enjoy Gates of the Mountains, the mighty Missouri River, Holter Lake, Canyon Ferry Lake, Hauser Lake, Spring Meadow Lake, Great Divide Ski Area, Montana WILD, and over 80 miles of trails on readily accessible public lands.
- Conveniently and centrally located, Helena is a perfect stop for activities and overnight stays for those traveling between Glacier and Yellowstone National

- Parks and for Canadians and snowbirds heading south.
- Special events and festivals throughout the year, including the Last Chance Stampede and Rodeo, Governor's Cup Race, Trail Rider, Farmers' Market, Downtown Helena's Art Walks and Wednesday's Alive at Five, Symphony Under the Stars, Meadowlark Music Festival, Last Chance Music Fest, Hikes, Bikes and Brews festival, Mondays at the Myrna Loy Center, Made in Montana Trade Show, Montana Mucker, state sports tournaments, and many other regional events.
- Helena has the most nonprofits per capita than any other population center in Montana. This focus on civic involvement and social service creates an inviting community.

**Helena's marketing efforts are often challenged by the following weaknesses and critical issues identified by the CVB:**

- The cost of airfare and flexibility of connections is a concern for travelers. Limited public transportation, both from outside and inside the city of Helena and limited large-scale convention and event facilities
  - The Helena Regional Airport continues to see growth in 2019 as an additional 8,000 seats have been added to the Helena flight schedule currently with the potential of more before the end of the year. The first phase of the \$12.1 million terminal expansion will be completed in the spring of 2019 with the second phase directly following. The terminal expansion project will be completed in the fall of 2020, and will provide the airport with the capacity to handle more flights, larger aircraft, and give travelers additional amenities. TSA PreCheck will also begin in the summer of 2019, providing a quicker screening process for those travelers who are enrolled. These improvements will continue to help move this challenge into a strength for Helena in the future.
- Limited public transportation, both from outside and inside the city of Helena
- Limited large-scale convention and event facilities
- Limited signage directing visitors to Helena attractions on interstate highways and within the city
- Signage is a project included in the Helena Downtown Master Plan
- Helena events are seeing increased competition from other Montana towns' events
  - Helena is working to secure High School events such as State Cross Country, Soccer and other events that fit into the limited infrastructure and space availability in the community.
- Lack of extended store, shopping, and attraction hours to accommodate tourists
  - While still an issue, store owner education and downtown events have made headway into resolving this challenge

**Montana's Brand Pillars perfectly match with Helena and what it offers visitors.**

*More spectacular unspoiled nature than anywhere else in the lower 48.*

Its location, nestled against the Rocky Mountains and opening into a lush valley, highlights the spectacular unspoiled nature that can be found just outside the city limits. Helena is surrounded by pristine mountains, rivers, and lakes. With over 80 miles of trails on Helena's South Hills, nearby public land, and Gates of the Mountains, visitors can escape into an outdoors that is still very much like it was when Lewis and Clark first set eyes on it.

*Vibrant and charming small towns that serve as gateways to natural wonders.*

Named one of the Best Small Arts Towns, Helena has all the amenities of a big city but with a small town feel. In addition to its rich history and culture, visitors will find biking and hiking trails, blue-ribbon fishing, and water recreation opportunities just outside city limits.

*Breathtaking experiences by day, relaxing hospitality at night.*

Whether it is the panoramic views from atop MacDonald Pass or watching a resident artist create their next piece at Archie Bray, Helena offers visitors unique and breathtaking experiences that can't be found elsewhere. Stroll along the walking mall to explore the many local shops. Or relax and enjoy some Helena flavor at a local restaurant, brewery, or distillery. At night, visitors can choose from historic bed and breakfasts or established hotels offering hometown Montana hospitality.

**Describe your destination.**

The Helena CVB addresses the three-phase decision process across its marketing plan with various tactics implemented to provide a smooth process throughout the target's travel planning.

*Inspiration*

In the Inspiration phase, the target audience will be made aware of Helena's attributes, inspiring a desire to visit Helena. Select tactics in the marketing plan address this phase by featuring information about Helena, promoting key attributes that interest target markets, and through vivid high-quality imagery. The tactics involved in the marketing plan that are part of the Inspiration phase include

- Consumer Advertising: The Helena CVB will develop a strategic media plan that utilizes MOTBD co-ops, Wendt-facilitated co-ops, and placement within publications that reach the target markets. Ads will highlight activities with a strong call to action and vivid images.
- Digital Advertising: The Helena CVB will develop a strategic digital media plan that targets markets with interest in the attributes of Helena. Digital ads will include eye-catching images that encourage engagement with links to specific pages and relevant information within Helenamt.com. Portions of the digital campaign will also include targeted video messages and native content to drive interest.
- Public Relations: The Helena CVB will seek out opportunities with national and regional publications as well as freelance writers/photographers to help generate stories about Helena. This will be accomplished by reaching out to magazine editors, responding to media inquiries, and pitching of special events or new opportunities for visitors to Helena. The CVB will also provide support to the Helena TBID, Southwest Montana, and Montana Office of Tourism and Business Development, if needed, to assist their public relations efforts whenever possible.
- Photo Library: The Helena CVB continues to build its photo library which includes hero shots and photos highlighting activities in and around Helena. It is used for advertising, media inquiries, news releases, website, and social media.
- Video: Helena uses short-form video as an opportunity to highlight Helena's attributes and activities. The video messaging includes a strong call to action to visit Helena. They are being used for advertising, public relations, and social media.

- Opportunity: It is important to have some reserved budget available for opportunities that may occur during the FY20 marketing year.

### Orientation

In the Orientation phase, the target begins researching the details of their trip, including the route and mode of transportation. Select tactics in the marketing plan address this phase by highlighting Helena's convenient location both within the state and between Glacier National Park and Yellowstone National Park. The tactics in the marketing plan that are part of the Orientation phase include:

- Helenamt.com – The Helena CVB will continue to work with the Helena TBID to maintain a website that provides travelers with access to information they need to plan their trip from beginning to end. The website includes maps and a call out to Helena's convenient location between the parks, service and attraction directories, an event calendar, sample itineraries, and much more.
- Consumer Advertising – Beyond a strategic media plan, the ads all feature a call out to Helena's convenient location between the parks, and for fly market promotions, mention of Helena's Regional Airport.
- Visitor Guide – The Helena Visitor Guide is an important piece in developing the traveler's intent to visit Helena. The travel guide is used in response to media inquiries and consumer advertising inquiries. It is distributed regionally and locally. The travel guide consists of maps, suggested routes, main attractions, dining options, breweries, distilleries, and local attractions.

### Facilitation

In the Facilitation phase, the traveler is looking for things to see and do in Helena and along the way. Select tactics in the marketing plan address this phase by providing sample itineraries, day trips, and activities broken into easy-to-use categories. The tactics in the marketing plan that are part of the Facilitation phase include:

- Helenamt.com: The Helena CVB will continue to partner with the Helena TBID to maintain the site to include up-to-date sample itineraries, easy-to-navigate activities, and must-see landmarks.
- Official Visitors' Guide: Full of information and maps needed to explore Helena. These guides are available throughout Helena including at lodging and popular attractions.
- Brochures: The Helena CVB developed a rack card brochure that highlights Helena's convenient location and main attractions. The brochure features hero photography and narrative copy about Helena and the surrounding area. The brochures are distributed along the travel corridor for visitors to Glacier and Yellowstone National Parks and to inform visitors about what Helena has to offer and why it's a perfect stop.
- Tear-Off Map: Helena CVB annually produces a tear-off map of Helena that is available at visitor centers and local businesses. The map is not only a road map, but also highlights major landmarks and attractions.
- Dining Guides: A detailed dining guide is printed and distributed through the Chamber of Commerce and to local attractions and area hotels.
- Visitor Center: The visitor center features knowledgeable staff and printed materials about what to see and do in Helena.
- Helena Walking Tour App: The app walks visitors through Helena's unique history and architecture. It includes new augmented reality that literally makes history come alive for the visitor.

### Optional: Include attachments here

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

### Target Geographic Markets

Based on inquiries from our marketing and advertising efforts, visitors to the Helena Chamber of Commerce Visitor Centers, direct flights to Helena Regional Airport, and the Destination Analysis report, Southwest Montana Arrivalist data, hotels and attractions, the Helena CVB will target the following states and provinces: Washington, Idaho, Utah, California, Texas, Arizona, Oregon, Wyoming, North Dakota, Illinois, Colorado, Minnesota, Alberta, and Saskatchewan.

### Target Psychographics:

The psychographic characteristics of Helena CVB's target market include those who appreciate unique dining experiences that are chef-owned/operated and that use food that is sourced locally; craft breweries and distilleries that offer an authentic connection with artisan brewers; and varied music offerings from small groups within a pub to medium-sized concerts at the fairgrounds. Our target also values access to our renowned biking trails, stunning waterways, and easy access for hiking and exploring.

### Target Demographics

A) Travelers Visiting Family and Friends: The most popular leisure travel purpose in Montana and nationally is visiting friends and relatives. These are adults 35+ years of age, traveling with or without children. They have a household income of \$70,000+, participate in scenic trips, photography, camping and hiking, wildlife viewing, skiing, and snowmobiling. These travelers enjoy outdoor activities, hands-on experiences, and tend to visit state parks, museums, historic trails, and nature areas.

B) Leisure Travelers: Adults 35+. They have a household income of \$70,000+ and travel with or without children in the summer months. They participate in shopping, attend social/family events, outdoor activities, rural sightseeing, and visit historic places and museums.

- Family Travelers: Affluent households with children under the age of 18
- History Buffs: Travelers who rate "historic attractions" as an extremely important attribute in selecting travel destinations

C) Adventure Travelers: Adults 30+ years of age, traveling with or without children. They have a household income of \$70,000+. They enjoy and participate in outdoor activities, such as mountain biking, fishing, hiking/backpacking, camping, water recreation, skiing, and snowmobiling.

E) Business Travelers/Meeting & Convention Planners: Business travelers often include leisure activities during at least one of their trips, and many take family or friends on those trips. Meeting and convention planners who seek to book small- to medium-sized conventions and meetings in an area offering unique western hospitality with a variety of local historic, cultural, and recreational activities.

*b. What are your emerging markets?*

Helena has two main emerging market and a market that is transitioning from emerging to a major target market. We will reach these markets through our planned tactics included in our marketing plan and through our creative execution.

**Emerging:**

**Music Festivals:** Music festivals are still on the rise and new ones are constantly being developed in cities across the United States and Montana. According to Billboard online, in the U.S. alone, 32 million people go to at least one music festival every year. Helena is fortunate to support three festivals annually – the Meadowlark Music Festival, the Last Chance Music Fest, Hikes, Bikes and Brews Music Festival, and Symphony Under the Stars. Along with these festivals, the Lewis and Clark County Fairgrounds offers night shows during the Last Chance Stampede and Fair and music is provided at Helena's weekly Alive at Five event. And lastly, Helena offers a vibrant music scene with live music provided at local establishments such as Miller's Crossing, Lewis and Clark Tap Room, Blackfoot River Brewing, and Silver Star just to name a few.

**Beerocations:** As craft breweries continue to grow in popularity across the country, so too has beer-related travel. Craft brewers are now a main attraction for travelers and have even become the star in annual events that draw large crowds. According to the Brewers Association, in 2017, beer tourism continued to grow with the average traveler visiting 2.5 breweries. Helena has long-established award winning breweries as well as up-and-coming new breweries that are already a hit at local brew fests. Beerocations have been increasing due to large travel sites such as Travelocity creating suggested beer trails and a beer tourism index. While this is a niche audience it continues to grow and Helena has the perfect mix to entice travelers looking for a beerocation.

**Emerging/Major:**

**Mountain Bikers:** With the slogan "a singletrack at the end of every street," and the designation of a Ride Center by the International Mountain Bicycling Association, Helena has become a destination for mountain bikers. Since 2015, Trail Rider shuttle service use has risen from 1,568 riders to 3,767 in 2017. From ITRR's Trail Usage study we know just over a quarter of all mountain bikers surveyed were from outside the local area. Helena will continue to grow this market because we have the infrastructure and tools (more than 80 miles of trails, Bikehelena.com, Trail Rider shuttle service, ride events, Vigilante Bike Park) in place to reach mountain bikers and provide an unmatched experience.

**Optional: Include attachments here.**

*c. What research supports your target marketing?*

The Helena CVB utilizes ITRR to refine its target audiences, including why visitors are attracted to Montana. The Helena CVB is also using the research provided by Destination Analysis and Southwest Region Arrivist data about Montana's potential high-value visitors and strategic messaging to create targets and messaging. Visits to the Helenamt.com site also help define the geographic targets outlined in the marketing plan.

Additional resources include:

- Ustravel.org
- Ntaonline.com
- Brewersassociation.org
- 2018 Trail Usage and Value – A Helena MT Case Study from ITRR
- Voicesoftourism.com/research

**Fiscal Year 19/20 Goals**

- 1) Increase arrivals, length of stay, and expenditures of Helena visitors by raising their overall level of awareness of Helena as a must-stop destination within Montana due to its recreational, cultural, and historical attractions and activities.
- 2) Seek appropriate marketing opportunities and partnerships with other tourism organizations, events, and activities. This includes the TBID, Downtown Helena, Helena Regional Airport, Southwest Montana Tourism Region, and Montana Office of Tourism and Business Development.
- 3) Increase awareness of Helena as a destination and encourage visitors to Glacier and Yellowstone National Parks to take advantage of Helena as a travel destination due to its convenient geographical location.
- 4) Increase awareness of Helena's historic, cultural, and recreational attractions among meeting and convention planners, helping them view Helena as a "see-and-do" destination.
- 5) Enhance and encourage visitor experiences while in Helena through Visitor Center orientation and informational materials.

**Fiscal Year 19/20 Measurable Objectives**

- Target travel media to increase visibility of Montana and Helena as a leisure travel destination.
- Promote existing historic/cultural assets for the enjoyment of residents and visitors.
- Enhance funding for region and CVB marketing efforts.
- Expand partnerships with tourism businesses/attractions and TBID as co-op partners.
- Create public/private/tribal partnerships for cooperative project implementation.
- Increase the number of user sessions by 10% per year on the CVB/TBID/Chamber website.

- Increase productivity of the Helena CVB's administration, project development, and overall marketing efforts.
- Develop a cohesive, effective marketing plan to be approved by the Tourism Advisory Council. Our plan will increase arrivals, length of stay, and expenditures of Helena visitors by raising the overall level of awareness of Helena's historic, cultural, and recreational attractions and activities.
- Enhance tracking/reporting and ROI from CVB advertising.
- Promote Montana to target groups/events.
- Conduct research annually to measure results of advertising, web marketing, and improvements in ROI.
- Clearly define marketing strategies, that funding is needed annually, and methods for measuring ROI.

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

The Helena CVB is most interested in affordable co-ops that will give them high-value placement while allowing flexibility with their limited budget. As long as the opportunity is a fit with Helena's target audience and goals, print or digital placement options are of interest to the Helena CVB. Through a partnership with the Helena TBID, marketing opportunities are evaluated to ensure there is no duplication of efforts. Helena is also interested in opportunities with travel planning sites allowing us to reach our target audience in the Inspiration and Orientation phases of the planning process.

Helena CVB Budget PieChart.pdf

Optional: Include attachment here. Helena research that supports target markets.docx

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

The Helena CVB has done co-ops with the MOTBD, Helena TBID, Southwest Montana and the Helena Regional Airport in the past. The results from these co-ops have been successful, and the Helena CVB plans to continue participation in co-ops with other bed tax funded organizations and the airport as long as they are available, fit within our marketing goals, and reach the target audience.

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

Helena has participated in several of the MOTBD print and digital co-ops over the past years: Sunset, History Channel, National Geographic Traveler, Outside, Backpacker, Sojern, Live Intent, Roots Rated, and TripAdvisor. Helena has seen great success with these co-ops, including exposure with target audiences and increased inquiries, and plans on continuing to include them when developing media plans.

Optional: Include attachments here.

Optional: Include attachments here. FY20 MARKETING PLAN BUDGET.docx

Optional: Include attachment here:

### Marketing Segment, Method & Budget

| Marketing Segment | Marketing Method | Describe your method.                        | Provide supporting research/statistics.    | How do you plan to measure success?                      | Provide a brief rationale for this method.   | Estimated budget for method. | Marketing Method Evaluation  | Add'l Atchmnt |
|-------------------|------------------|--|--|--|--|------------------------------|--|---------------|
|                   |                  | Opportunities arise throughout the year when | High-quality images and video that capture | This projects success will be determined by tracking the | The Helena CVB has a large photo library that is utilized for everything from social media to print ads and public relations opportunities. Photos have to be acquired for special circumstances. The Helena CVB relies on the photo library to keep its production costs low and respond to all |                              | This method was successful as we met our objective. The CVB purchased the rights and usage of 2 photos that were |               |

|          |                            |  |  |  |   |             |   |  |
|----------|----------------------------|--|--|--|---|-------------|---|--|
| Consumer | Photo/Video Library        | specific photography/videography needs to be purchased to create niche marketing campaigns and fulfill request from publications, writers and for online media.  | events, activities, attractions and the spirit of Helena make Helena's marketing efforts more powerful by showing what there is to experience in Montana's Capital City.   | amount of use of the photographs and video for public relations, marketing, website and social media efforts by the Helena CVB.  | promotional opportunities with high-quality images. The CVB recognizes the availability of MTOT photography as well as the availability of area photography. Helena produced three :15 videos as a part of the FY19 digital campaign. In FY20, the CVB will be looking to increase the footage library of Helena events, activities and attractions that are truly unique to Helena.  | \$2,500.00  | added to our digital library and we spent under the budgeted amount. We will continue to use this method in the future as we plan on needing more photos and videos for future advertising. Digital copies of the photo assets are on file with our organization.   |  |
| Consumer | Online/Digital Advertising | As a primary component of the FY20 marketing plan, the Helena CVB will develop an online marketing campaign to introduce and reinforce Helena to the target markets and as a method of educating and producing click-throughs to the Helena website from potential visitors. Specific media vehicles and timing will be determined after July 1, 2019. | The trend of people being inspired and planning their travel online is only increasing as people receive their information through smartphones and tablets. The FY 17/18 campaign saw 4,733,141 impressions and 23,336 click-throughs for an average cost of \$2.14 per click. The FY18/19 campaign evaluation has begun and will drive the planning for FY20. | Effectiveness of this project will be measured by tracking inquiries, impressions, clicks, and click-through rates generated, and by calculating the cost per thousand, per click, and per inquiry. The Helena CVB will also be monitoring usage statistics from CVB's website Helenamt.com. | As more travel planning is done online, the Helena CVB would like to take advantage of the affordable options available to reach potential travelers. The digital campaign will be designed to fit within our geographic and demographic targets with proven tactics and strategically based emerging opportunities. The CVB will also participate in any co-op opportunities that fit with the goals of the marketing plan through MOTBD or third parties. | \$70,000.00 | As with many tourism organizations, much of the planned media strategy was paused or canceled in late Spring/early Summer due to the travel restrictions associated with COVID-19. Those plan alterations are noted in the attached review. However, prior to having to pause or cancel our campaign, we were still able to generate 1.7 million impressions and 5,086 clicks with a CTR of .30% and a CPC of all platforms of \$4.51. These are all great statistics and we will continue to use this marketing method and this method was successful as we met our objective. Copies of digital ad examples are attached and on file at the Helena CVB. | 20-HCV-7000 FY20 Media PerformanceReport.pdf |
|          |                            | The Helena CVB will develop a consumer marketing campaign as a   | Helena has seen great success in driving inquiries and traffic to the website with past consumer marketing campaigns. For FY18, Helena's ads reached 876,000 people with a cost per inquiry of \$2.54. While the Consumer Marketing Plan was active, the Helena website and  | Effectiveness of this project will be measured by tracking inquiries generated and by calculating the cost per inquiry. The Helena CVB will also be monitoring usage statistics from the   | This campaign will inspire travelers to plan a trip to Helena through high-quality images and attention-grabbing copy. It will meet the needs of travelers by educating them about all Helena offers, as well as connecting them to the website or travel planner, which both contain trip suggestions and tools to help with their vacation planning. The campaign will  |             | The CVB advertised in five magazines including Parents Magazine which was a Joint Venture with the Office of Tourism. Circulation/Distribution  |  |

|                   |                   |   |   |  |   |             |  |  |
|-------------------|-------------------|---|---|--|---|-------------|--|--|
| Consumer          | Print Advertising | method of building awareness of Helena's outdoor recreation opportunities, arts and culture, historical attractions, special events, and convenient location between the parks with our target audiences.   | 800 number also saw a marked increase in activity. While we are doing less print placement than previous years, we do find value in placing in the Southwest Montana Travel Planner and the Parents Magazine partnership opportunity with MOTBD. At the time of this planning cycle we are still monitoring the FY19 print media plan elements will provide final reporting once the campaign is completed. | website Helenamt.com. The Helena CVB will respond to inquiries with the Helena Travel Planner produced with private sector dollars. Our objective is to increase inquiries by 5% and increase the number of user sessions by 10% per year on the Helena CVB website. | also produce inquiries from potential vacation travelers through the inclusion of the Helena 800 number and website on materials, as well as reader service when available. The campaign will be designed to fit within our geographic and demographic targets. In order to increase effectiveness of the consumer marketing campaign, editorial calendars will be evaluated to find stories related to Helena's identity and travel product.   | \$18,000.00 | of our ad was 8,607,200 magazines. The CVB received 10,441 inquiries at a CPI of just \$1.45. This was a very successful campaign and we will continue to use this marketing method in the future. Copy of ads appearing in the print publications are attached and on file with the Helena CVB.   | FY20 Helena CVB Final Print Inquiry Report.xls |
| Marketing Support | Printed Material  | <p>Helena prints a tear-off map that gives travelers information about how to get around Helena and easy ways to find various landmarks and attractions.</p> <p>We also print a local dining guide to give travelers a "at a glance" list of the various places for dining in Helena.</p> <p>A local printer that has previously printed the maps and guide will be used, thus avoiding additional costs such as set-up fees charged by other printers.</p> | Each year, businesses run out of the tear-off maps because they are so useful to visitors. The maps are helpful when local businesses are giving directions or recommending places to visit in Helena. We have had many requests for the dining guide and expect to use all of the guides that are printed.   | Success of this project is based on how many maps and guides are given out and feedback from the businesses that have them.  | Helena can be a tricky city for visitors to navigate, even with GPS, and they may be unfamiliar with Helena's can't-miss attractions. The tear-off map is given to local businesses such as hotels, museums, and other tourist locations to be handed out to travelers and those who need help finding their way around Helena. This not only increases visitors' awareness of all Helena has to offer but makes their experience stress-free. We will also print a comprehensive dining guide that will be distributed through the Helena Chamber, local attractions and hotels. | \$3,300.00  | The dining guide was placed and distributed in 20 local hotels as well as the Chamber and Airport Visitors Centers and the Visit Helena offices. The CVB printed 2500 guides and all of the guides have been distributed. Approximately 95% of the guides have been taken by guests and visitors. The feedback that we received from the visitors centers and hoteliers continues to be very positive. This has been a successful strategy and a worthwhile project and we will continue to use this marketing method. A copy of the Dining Guide is attached and on file at the Helena CVB. The CVB did not reprint the tear off map as we have several of the maps still available. The CVB is working with DHI and the Helena TBID to produce a more current and updated map and will complete this project in FY 2021. | Helena CVB Dining Guide.pdf                    |
|                   |                   |   |   | These funds are used to  | It is important to attend these   |             | Although the Helena CVB did not incur any expenses with this method as the meetings were held in Helena or via zoom due to the Covid-19 pandemic, this was still a very valuable method. The annual  |  |

|                   |                                    |   |  |  |   |             |   |  |
|-------------------|------------------------------------|---|--|--|---|-------------|---|--|
| Marketing Support | TAC/Governor's Conference meetings | These funds will be used to attend TAC Meetings, the Governor's Conference on Tourism and any meetings required by the TAC.   | By statute, the executive director or representative is required to attend all virtual and in-person TAC meetings and the annual Governor's Conference on Tourism and Recreation. The executive director will have the opportunity to take away information and best practices to incorporate into future marketing endeavors. | attend TAC meetings and the annual Governor's Conference on Tourism and any other meetings deemed necessary by the MOTBD & TAC. Success will be measured by the key take aways presented at these meetings and incorporating them into marketing projects. | meetings to see what other tourism entities as well as the MTOBD are doing in their marketing efforts. Items such as Joint Ventures and other opportunities to participate in nationwide marketing are discussed and this is a great opportunity to network with peers from around the state. | \$1,250.00  | Governors Conference on Tourism was also cancelled due to Covid. The executive director attended all TAC meetings and in addition the director reported back to the board of directors during monthly meetings that were held. Several relevant items were brought forward and at least a half a dozen items that included detailed information and resources to improve our marketing and advertising. TAC meetings provided valuable information and training needed while dealing with the current health crisis and the effect that this has had on travel and tourism. We will continue to use this method in the future.  |  |
| Marketing Support | Administration                     | The Director is responsible for carrying out the Marketing Plan and Budget of the CVB and ensuring that the rules and regulations set forth by the TAC are followed and administered. | This is an operational method employed by the organization in order to adhere to the state statute and governing rules and regulations.  | Success will be measured by a successful annual audit performed by the Mt Office of Tourism.   | Administration Funds are used for personnel, office supplies and other basic needs to support an office.  | \$27,300.00 | The CVB has used Administration funds every year since becoming a CVB. While it may not be directly supported by specific research, past experience has demonstrated that the organization's operations and successful marketing relies on administrative funds. Often the Administration funds budget is added to or combined with other administrative funds provided by the joint operation of a CVB, Chamber of Commerce, TBID, or other. Without these funds it may not be economical or feasible to have permanent staff administering the CVB. A total of \$23,907.79 was spent, which is 20% of the total marketing budget. We were successful in meeting our overall objective of staying within the allowable 20% for the Administration budget. We will continue to use this marketing method. |  |
|                   |                                    | The Helena CVB would like to assign a project and budget for Joint Ventures that may occur  | Joint Ventures that have come up during  | Metrics for success will be determined   | Joint Ventures will allow the Helena CVB to be prepared if  |             | The CVB advertised in five magazines including Parents Magazine which was a Joint Venture with the Office of Tourism. Circulation/Distribution of our ad was 8,607,200 magazines. The CVB received 10,441 inquiries at a CPI of just \$1.45. This   |  |



|                   |                                       |  |  |  |   |            |  |                             |
|-------------------|---------------------------------------|--|--|--|---|------------|--|-----------------------------|
| Marketing Support | Joint Ventures                        | during the FY20 marketing year. When Joint Ventures arise, the CVB will submit details of the project to the TAC.  | the year have provided Helena considerable press and earned media in the past.   | when a Joint Venture project is submitted to the TAC.  | Joint Venture opportunities arise in FY20.  | \$1,000.00 | was a very successful campaign and we will continue to use this marketing method in the future. All of the funds set aside for this method were used and the balance came out of the Print Advertising segment.  |                             |
| Marketing Support | Fulfillment/Telemarketing/Call Center | The Helena Chamber of Commerce will produce and print a vacation guide that will be used as a fulfillment piece for the Helena CVB. In 2019, the Chamber increased the number of guides printed from 20,000 in 2018 to 25,000.   | A study done by ITRR in 2016 showed that 25% of travelers use brochure information racks. Our goal will be to have the Helena Visitors guides available for those looking for a hard copy of tourist information.  | Success will be measured by the number of guides distributed and given out both locally and due to advertising by the CVB. This will also allow us to evaluate which states are requesting the most visitor information. | The Helena CVB distributes our travel guide to local businesses including hotels, restaurants and tourist attractions. The guide is also mailed out to anyone who requests tourist information through the Helena Chamber/CVB. The CVB advertises in various magazines as well as digital online advertising. Leads for tourist information are received and fulfilled by the Helena Chamber/CVB. | \$4,500.00 | The CVB distributed and mailed out to requests all 25,000 guides printed. We also met our goal of mailing out the fulfillment piece in a timely fashion by responding to all requests in less than 2 weeks. This was a successful strategy and we will continue to use this marketing method in the future.  |                             |
| Marketing Support | Opportunity Marketing                 | An opportunity was identified and funds were spent to attend the Montana Airlines Rendezvous held in Big Sky in September 2019. The objective was to learn about the possibilities of increasing flights from carriers currently not in our market and growth from those that currently service our market and to gain resources and establish contacts. The success was measured by attendance by the Executive Director of the CVB and key staff from the Airport as well as other other supporting entities and building relationships with airline executives. | By meeting in person with prospective airlines relationships will be established so that when an opportunity is made available to increase or add air services, Helena will be involved in the discussion. These relationships are critical when it comes to increasing air services to our community. | Success will be measured by the opportunities presented to increase air service in the Helena market.  | Relationships were built and Helena is currently working with American Airlines to expand Helena Air Service options between Helena and Phoenix Arizona.  | \$3,100.00 | The objectives were met as relationships with airline industry officials were established. The delegation included both the airport executive director and assistant director and the director of (MBAC) Montana Business Assistance Connection. We were able to meet with executives from 8 different airlines and discuss possible increased airline service in the Helena market. The relationships established with these executives will help in future discussions regarding increased air service. This method will be used again as it is an efficient and effective means of adapting the marketing plan to take advantage of | 2019 Airline Rendezvous.pdf |

|                   |                            |  |  |   |   |              |  |                                 |
|-------------------|----------------------------|--|--|---|---|--------------|--|---------------------------------|
|                   |                            |  |  |   |   |              | opportunities unknown at the time of initial planning.   |                                 |
| Marketing Support | Marketing Plan Development | The Helena CVB annually revisits its marketing position and works to develop a strong, focused marketing plan. This project encompasses the marketing support provided by Wendt in the form of preparation for, and the subsequent development and writing of, the FY21 Marketing Plan for submission to the Tourism Advisory Council. Also included in this cost is any materials needed for the presentation of the marketing plan to TAC. | The Helena CVB has seen success in planning and executing marketing tactics that reach the goals and objectives set forth by TAC and the CVB Council. A marketing plan also allows us to set up metrics to measure the tactics and compare year to year allowing us to fine tune what is successful and what has not worked. | Our success will be measured in reaching and exceeding the objectives set forth in the FY20 marketing plan, including increasing inquiries and increasing overnight stays among those already traveling to Montana.   | Our overall objective is to develop a cohesive, effective marketing plan to be approved by the Tourism Advisory Council. Our plan will increase arrivals, length of stay, and expenditures of Helena visitors by raising the overall level of awareness of Helena's historic, cultural, and recreational attractions and activities. All tactics will address the travel decision process.                          | \$3,000.00   | Wendt is our agency of record. They are contracted to perform marketing plan development, research, creative design services, media/ad placement and results tracking and reporting. These necessary services are beyond the scope of the CVB staff and resources and are best accomplished by an ad agency. Wendt performed all services per contract in FY20 and were paid by invoice (see attached). The services provided by Wendt ensured that our objective of creating and executing a strategic marketing plan in compliance with statute and guidelines was met in a timely manner. The method was successful and will be used again to build upon existing marketing strategies and future plan development. | FY19-20 Wendt Invoice Recap.pdf |
| Marketing Support | Research                   | Smith Travel Research produces a monthly "Star Report." This report is the hotel industry standard of benchmarking and provides useful data such as occupancy, demand, revpar and supply to the Helena CVB.  | The Smith Travel Report provides the research necessary to see trends and opportunities in the lodging industry and across Montana.  | Effectiveness of this project will be measured as we track trends in occupancy and revenue collected by local hotels. From that we will be able to see the impact we are making with our advertising dollars. This information will be distributed to the hotel/motel association and other entities interested in information. | With this report the Helena CVB will be able to see fluctuations in occupancy and demand while deciding what months and seasons the CVB may need to market differently. This research will not only provide us with a benchmark for success in our sales efforts, but will be a destination management tool as we look at the quantity of rooms and evaluate our occupancies in our high, low and shoulder seasons. | \$2,400.00   | This is the 14th year that the Helena CVB has purchased the Smith Travel Research Report. This report has been very valuable to the CVB and to all of our local partners. Due to the Pandemic, this year was a critical time to know where occupancy and revenue has been in the past so that we know the true impact of Covid-19. Although the Pandemic did not begin until the last quarter of the FY, Occupancy was still down 20% and Revenue was down 22%. This is an invaluable resource to know where we have been and to gauge where we are going. This was a very successful strategy and we will continue to use this marketing method.  | June 2020 STR Report.xls        |
|                   |                            |  |  |   |   | \$136,350.00 |  |                                 |

## Marketing Method Evaluation Attachments

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|                      |   |
|----------------------|---|
| <b>Attachment 1</b>  | Helena CVB FY 2020 Budget vs Actual Pie Chart.pdf |
| <b>Attachment 2</b>  | FY 2019-20 P&L Budget vs Actual.pdf               |
| <b>Attachment 3</b>  | Yellowstone Jrnl_2020_Ad.pdf                      |
| <b>Attachment 4</b>  | SW MT Travel Planner_2020.pdf                     |
| <b>Attachment 5</b>  | Parents Magazine_April_MOTBD Co-op.pdf            |
| <b>Attachment 6</b>  | BMW Owner News_Apr2020.pdf                        |
| <b>Attachment 7</b>  | 2019 Craft Brew Ad.pdf                            |
| <b>Attachment 8</b>  |   |
| <b>Attachment 9</b>  |   |
| <b>Attachment 10</b> |   |

## Marketing Method Budget

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| Marketing Segment | Marketing Method                      | Bed tax funded budget | Non bed tax funded budget (optional) |
|-------------------|---------------------------------------|-----------------------|--------------------------------------|
| Consumer          | Print Advertising                     | \$18,000.00           | \$0.00                               |
| Consumer          | Online/Digital Advertising            | \$70,000.00           | \$0.00                               |
| Consumer          | Photo/Video Library                   | \$2,500.00            | \$0.00                               |
|                   |                                       | \$90,500.00           | \$0.00                               |
| Marketing Support | Printed Material                      | \$3,300.00            | \$0.00                               |
| Marketing Support | Administration                        | \$27,300.00           | \$0.00                               |
| Marketing Support | TAC/Governor's Conference meetings    | \$1,250.00            | \$0.00                               |
| Marketing Support | Marketing Plan Development            | \$3,000.00            | \$0.00                               |
| Marketing Support | Research                              | \$2,400.00            | \$0.00                               |
| Marketing Support | Opportunity Marketing                 | \$4,700.00            | \$0.00                               |
| Marketing Support | Joint Ventures                        | \$1,000.00            | \$0.00                               |
| Marketing Support | Fulfillment/Telemarketing/Call Center | \$4,500.00            | \$0.00                               |
|                   |                                       | \$47,450.00           | \$0.00                               |
|                   |                                       | \$137,950.00          | \$0.00                               |

## Miscellaneous Attachments

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| Description | File Name | File Size |
|-------------|-----------|-----------|
|-------------|-----------|-----------|

## Reg/CVB Required Documents

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| Description                            | File Name                                   | File Size |
|--|---|-----------|
| Chamber Board CVB MP & Budget Approval | Chamber Board CVB MP & Budget Approval.docx | 14 KB     |
| Helena CVB Application                 | Helena CVB Application.pdf                  | 223 KB    |
| Helena CVB Cert of Compliance          | Helena CVB Cert of Compliance.pdf           | 296 KB    |
| Helena CVB Pledge of Understanding     | Helena CVB Pledge of Understanding.pdf      | 236 KB    |

