



Grant Details

80683 - FY20 Region/CVB Marketing Plan

86690 - FY20 Visit Big Sky Marketing Plan

DOC Office of Tourism

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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?

BIG SKY: Tourism & Outdoor Recreation Meet Business Creation

Today, Big Sky, Montana is a unique, mountain resort community as envisioned back in the late 1960s by its founder, pioneering newscaster and Montana native, Chet Huntley.

Born a destination ski resort, today Big Sky is home not only to Boyne-owned, Big Sky Resort and the *Biggest Skiing in America*® offering 5,800 acres of skiable terrain, but in addition, in summer it is a Gateway Community to America's First National Park – Yellowstone, just less than an hour's drive away. Far-removed from any urban center, Big Sky's location at the junction of U.S. Hwy 191 and MT Hwy 64 (Lone Mountain Trail) in south-central Montana, is centrally positioned along the ninety mile stretch through the scenic Gallatin Canyon between Bozeman Yellowstone International Airport (BZN) to the north and the most accessed entrance to Yellowstone to the south. Big Sky itself is situated at the base of iconic Lone Peak, elevation 11,166 feet, and encompasses the "Canyon," "Meadow" and "Mountain" areas, each with its own distinct geography, culture and personality.

Tourism, rooted in Outdoor Recreation, is the #1 industry driving Big Sky's growth and contributing substantially to the \$3.7 billion statewide tourism economy. Not only is outdoor recreation the reason why people choose to visit here, but it is why eventually, they choose to live here.

Big Sky is an economic engine fueling Montana's economy. It currently ranks third in the top five destinations in Montana Lodging Facility Use Tax revenue collections, behind Billings – the state's largest city, and Missoula, home to University of Montana, ahead of Bozeman – the fastest growing micropolitan in the U.S., and West Yellowstone.

Visit Big Sky (VBS) is the official Destination Management and Marketing Organization (DMMO) and fiscal sponsor of the Big Sky Convention & Visitor Bureau (CVB). It manages Big Sky Resort Area District (BSRAD) Resort Tax revenues allocated to it during an annual competitive process and combines these funds with Montana Lodging Facility Use Tax (4%) dollars appropriated by the state along with private investment to develop and promote the Big Sky destination. To ensure that the travel customer's journey from "touch down to takeoff" in Montana is a remarkable experience, VBS operates the Big Sky & Greater Yellowstone Visitor Information Center (VIC) offering the highest level of customer experience and satisfaction for guests by providing travel planning assistance seven days a week, Memorial Day through Labor Day, and Monday through Friday during winter months, with a 24-hour lobby, internet connectivity and public restroom facilities. In summer 2018, the VIC hosted 4,173 guests.

Our Vision: Big Sky's confluence of nature, culture, people and preservation is so inspiring that one visit makes you want to stay for a lifetime.

Our Mission: As the community's official destination management and marketing organization, Visit Big Sky drives the development and marketing of authentic tourism experiences, through research and stakeholder collaboration to grow Big Sky's economy while balancing the need to sustain quality of life for its residents.

1A: Strengths

Proximity to America's First National Park – Yellowstone (YNP) – Montana's National Parks – specifically Yellowstone and Glacier – are the #1 draw for our non-resident visitors per Destination Analysts' Montana Destination Brand Research Study (October 2016). Further, according to a recent in-depth study, YNP is the fourth most recognized travel destination in the Western United States among international travelers. In 2018, YNP played host to upwards of 4.1 million people. The number of guests was down slightly year over year from 2017, however 2016 a record year with more than 4.26 million people visiting the park, a 4% increase over 2015 and a 21% increase over 2014. The most trafficked west entrance to Yellowstone is located less than an hour's drive from Big Sky, and once again witnessed 1.7 million visitors pass through its gate in 2018. It is the proximity to a world-renowned bucket list destination, as well as more luxurious accommodation options than found at other park entrances, that continues to provide opportunity to drive visitation to Big Sky in the summer and shoulder seasons from April through November. The fact that Montana also plays host to Glacier National Park adds to the draw as more and more visitors choose to travel to Montana and "Between the Parks" while here albeit a 962-mile drive.

*Sources: <https://www.marketmt.com/Portals/129/shared/docs/pdf/brandResearch.pdf>;

<http://www.yellowstone.co/stats.html>

Outdoor Recreation | Adventure – Big Sky encompasses 120.2 square miles of natural beauty completely encapsulated by public lands, with numerous mountain ranges, the majestic Gallatin River, and diverse wildlife along with year-round recreational activities all right in its backyard. It is ideally suited for both the educated traveler and families in pursuit of adventure and outdoor recreation in winter and summer. Winter brings visitors in search of the *Biggest Skiing in America*®, with world-class downhill skiing and snowboarding at Big Sky Resort now also available via the IKON and Mountain Collective pass product offerings which has introduced the destination to a valuable audience of passionate skiers. Nordic skiing at Lone Mountain Ranch – a National Geographic Unique Lodge of the World – is also a draw, along with dog sledding, snowshoeing, snowmobiling, blue-ribbon winter fly fishing, and ice-climbing. The Big Sky Skating and Hockey Association's ice rink, open to the public for ice skating and hockey in Big Sky Town Center, along with horse-drawn sleigh rides and snow coach dinners round out the destination's winter activities.

Big Sky's greatest opportunity however is to grow the destination's reputation BEYOND world-class winter. Boyne's Big Sky Resort spearheads a significant portion of winter marketing, now even more so with the comprehensive push by Alterra Mountain Co., founders of the IKON Pass, and the collaboration of ski companies behind the Mountain Collective, some of the world's best ski resorts. Occupancy levels differ by roughly 20-25% between the two seasons, and four months of shoulder seasons remain between mid-April and mid-June and October through November. The summer recreation experience in Big Sky is unparalleled: comprised of 50+ hiking trails including the 6.6-mile round trip Beehive Basin Trail, fly fishing, whitewater rafting and kayaking, horseback riding, mountain biking, rock-climbing, bird-watching, camping, golf and zip-lining. Additionally, Big Sky Resort's *Basecamp to Yellowstone*® offers activities such as the Lone Peak Tram ride, high ropes course, climbing wall and paintball course. Big Sky's 25+ acre Community Park with growing amenities and trail expansion, additional mountain biking and hiking trails, is also a draw. Finally, Big Sky has tremendous access to regional outdoor experiences that can be explored as a part of any trip including Hyalite Canyon, Hebgen Lake, Quake and Wade Lakes, the Headwaters of the Missouri, Ennis/Madison River, and Virginia City.

NEW Hotel Inventory | Home to One of the Largest Convention Properties in Montana

The Wilson Hotel – Residence Inn by Marriott located in Big Sky Town Center opens late May 2019 and with it, brings Big Sky its only branded property to date. This new 129-room hotel includes a meeting facility to accommodate group meetings and conferences for approximately 200 guests and will complement existing meeting facilities, however more importantly, via its ownership by the world's largest hotel company – Marriott, it will showcase the destination through Marriott's extensive marketing channels and loyalty programs to an entirely new audience. In addition, The Wilson is the first property located in Town Center able to host a large number of guests. As such, it will be a magnet for summer resident visitation and adjacent states drive market non-resident visitation due to the vibrant activities/events happening there. This is compounded by the fact that Big Sky is also part of the Bozeman Micropolitan Statistical Area which includes all of Gallatin County. It is the fastest growing micropolitan in the U.S. which means there is a constant influx of new residents for Big Sky to attract. On the business traveler side, Big Sky Resort's Yellowstone Conference Center continues to offer state-of-the-art accommodations, with meeting facilities capable of hosting 750 guests, which attracts national and international corporations and organizations for conferences.

Sense of Arrival in Big Sky – Big Sky, historically has attempted to attract visitors traveling on the US Hwy 191 corridor to/from Yellowstone. However, the intersection where potential visitors would turn lacks any visual entry features (arrival sequence) that one would expect to find at the main intersection to a world-class mountain resort community. As a result, many cars simply drive past the entrance to Big Sky. Although the Big Sky & Greater Yellowstone Visitor Information Center (VIC) is currently conveniently located at this location, the former landlord/owner was unwilling to enhance or improve the property due to it being for sale. The Corner Property sold to new owners in summer 2018, and has since been under development, seeing infrastructure improvements, building renovations including inside the VIC, new structures and parking lot renovations. All of this, along with plans for new signage and an entryway designation will contribute a sense of welcoming to visitors and residents alike at Big Sky's front door.

Vibrant Event-driven Destination – Big Sky's full-time resident population is approximately 3,000 but can grow as large as 15,000+ during peak periods. To round out the destination beyond its outdoor recreation experience, the community hosts at least forty major events annually. Unique events, activities and entertainment make Big Sky enticing to both the regional drive market and the out-of-state visitor. The continued development of Big Sky Town Center including the recently relocated Big Sky Events Arena and new Plaza located adjacent to The Wilson Hotel make it the hub for community events especially in the summer with Music in the Mountains, a free outdoor concert series and multi-day Classical Music Festival, a weekly Farmer's Market with 100+ vendors, and Big Sky PBR voted Event of the Year six times which draws 15,000+ attendees. On the mountain, Big Sky Resort's Craft Beer Festival and Vine & Dine, along with the Moonlight Musicfest additional other summer draws. Winter-season events and activities include the Big Sky Christmas Stroll, Big Sky Skijoring, and Big Sky Big Grass. Competitive sporting events such as The Rut and Big Sky Kids' Adventure Games, World Free-skiing Tour circuit, Sam Adams 3D Air & Apres Show, and the new Big Sky Biggie 50m/30m Mountain Bike Race continue to grow drawing participants and spectators from around the globe.

Technology/Research – VBS renewed its three-year contract with DestiMetrics in 2019. The goal of this relationship is to continue to gain market intelligence and lodging metrics for the North American mountain travel industry consisting of 18 mountain resort destinations and the local destination being that VBS has no inventory per say. Big Sky lodging entities and property management companies contribute their data confidentially to DestiMetrics. It is then compiled and shared in aggregate via monthly reports outlining lodging performance based on Occupancy Rates and Average Daily Rates. It provides year-over-year data analysis including "booking pace" for the upcoming six

months. A Retail Report projecting the next 60 days occupancy can be shared with the businesses throughout the destination to assist them with staffing levels. And finally, in each monthly report, DestiMetrics provides a market overview and comparison of the industry encompassing the 18 destinations with broader market conditions and travel trends impacting tourism-dependent communities and businesses. A monthly conference call, and in-person meetings are held quarterly to discuss the qualitative impacts contributing to the picture painted by the data.

1B: Potential Challenges

Workforce/Affordable Housing— Fifty percent of Big Sky's workforce commutes in daily per the 2018 Big Sky Housing Assessment and Action Plan Report by WSW Consulting, and this does not include the transient construction trade traffic. In 2019, the Bureau of Business and Economic Research (BBER) hosted one of their state-wide Economic Outlook Series events in Big Sky for the first time. The theme was *Facing the Challenges of Affordable Housing in Montana* demonstrating that this issue is impacting all of Montana. However, this issue in Big Sky is at crisis proportions with more than 500 units needed just to address current housing needs, and this is only compounded by the fact that the Bozeman Metropolitan Statistical Areas which includes all of Gallatin County, is the fastest growing in the U.S. The resulting negative impact on businesses and their ability to attract and retain a qualified workforce is undeniable. Recruitment continues to be a major pain point for Big Sky's businesses. This in turn affects Big Sky's overall reputation to provide quality customer service/hospitality which could impede future growth of the destination. Further, being able to house local workers at all levels contributes to the continued build out of Big Sky from that of a tourist destination to an actual community. This is what will make Big Sky more sustainable year-round and lessen the impact of shoulder seasons. Meadowview II, the first public private partnership to build deed-restricted workforce housing will see its first homeowners in June 2019. The Down Payment Assistance program, created in 2018, continues to assist Big Sky workers with the purchase of a permanent residence in our community but with an average median home price of \$1,2 million per Trulia 2018, there is not much inventory out there within their reach.

Shoulder Seasons/Short Term Rentals—Two "Shoulder Seasons" exist in Big Sky, defined as the time when Big Sky Resort and many local businesses close, typically the third week in April through the first week of June, and again from October through Thanksgiving weekend (weather permitting). Also, the west entrance to YNP in West Yellowstone is closed to vehicular traffic between early November and late April. Only guided snow coach and snowmobiling tours enter in winter months, which is not widely known by first time visitors based on data collection in the VIC. The Shoulder Seasons are contracting as the community continues to grow and diversify, however unfortunately there are still times when Big Sky is NOT "Open for Business." Another contributing factor to this is that 70% of residences in Big Sky are owned by second homeowners who either choose to let their home sit vacant when they are not here or reap the financial benefit of it as a short-term vacation rental property. The loss of long-term rentals over the past three years is significant, again which negatively impacts the workforce, and those that remain see rents through the roof with individual bedrooms being rented out at amounts far beyond what an individual, couple or family can afford to rent the full unit. If more people lived and worked here year-round, and supported local businesses year round, there would be less shoulder.

Natural Events/Economic and Political Environment— Big Sky is a destination rooted in outdoor recreation. Therefore, its tourism-based economy is impacted by natural events such as wildfires, compromised waterways, low levels of snowfall and more. These unpredictable acts of nature can be devastating. Economic factors and political challenges at a national and international level, such as a recession or decreased international visitation due to travel restrictions and political tensions, could negatively affect the number of visitors coming to Big Sky. In addition, there can be no destination branding without locals while at the same time there can be no destination without visitors. Locals need to embrace tourism, or it will not be sustainable in the long term. Recent pressures on community infrastructure from increased winter visitation in peak periods have raised tensions among residents who are left to feel these impacts after travelers return home.

Continued Threat to Funding for CVBs (DMOs)/Increase in MT Lodging Tax — Every Montana Legislative Session, the Montana Lodging Tax becomes a target as a funding mechanism for other state programs from Medicaid expansion to Aquatic Invasive Species prevention, and everything in between, due to the economic driver that is the tourism industry. The instability for our organizations makes it very difficult to focus on our work and plan for the future due to the constant need to defend this attack on and erosion of our tourism development and promotion funding stream. Competition for visitors is at an all-time high with the internet leveling the playing field for even the smallest of destinations globally. International visitation to the U.S. has declined as more and more destinations have become a choice for the traveling public. Further, if the trend to increase the MT Lodging Tax continues as was done in the 66th Montana Legislative Session, our competitive advantage over other, higher priced/taxed destinations could be lost, making us less attractive to come visit.

1C: Opportunities

NEW Legislation: Senate Bill 241 (SB 241)— The ten Resort Tax Areas/Communities within Montana, whose local resident populations are dwarfed by the number of visitors they play host to each year, were successful at the 66th Montana Legislature in getting Senate Bill 241 signed into law. This enabling legislation will allow these communities to bring a vote to their local electorates to increase the Resort Tax by up to 1% to fund specific infrastructure projects to address water, sewer, roads, bridges and other transportation needs. May 2019 elections will determine if Big Sky elects to use this funding tool to address its major infrastructure challenges.

Yellowstone National Park Corridor/Summer Messaging—As was stated in Strengths, Big Sky's position adjacent to Yellowstone National Park is a primary driver for summer visitation and a point of differentiation from other mountain resort towns such as Aspen, Park City, Telluride, and Vail. The opportunity for Big Sky to leverage the fact that 1.7 million visitors enter the Park less than an hour's drive from it remains a strong growth opportunity. Big Sky is a Gateway Community Partner to Yellowstone Forever, YNP's philanthropic arm, and continues to explore ways to partner as such. In addition, it is extremely helpful to Big Sky that new Superintendent of the Park is intimately familiar with the Big Sky destination having worked here in hospitality in his youth.

COMING SOON: Another NEW Hotel(s) and Second Large Convention Property

In September 2018, Montage International in partnership with Cross Harbor Capital Partners held a ground-breaking ceremony for the \$400 million Montage Big Sky at Spanish Peaks Mountain Club. A new luxury hotel, it will feature 150 guestrooms and suites with 12,870 square feet of some of the finest meeting and event space in the greater Rocky Mountain region. This coupled with Big Sky Resort's Yellowstone Conference Center will increase Big Sky's ability to attract the MICE (Meetings, Incentives, Conventions and Exhibitions) market. Two additional hotels are in the works, one in Moonlight Basis and the other in Big Sky Town Center, however details have not been released.

Big Sky Resort's Big Sky 2025 Development Plan/Winter Messaging— Big Sky Resort's 10-year, \$150 million *Big Sky 2025 Development Plan* includes extensive mountain improvements and additional summer recreation activities; Mountain Village enhancements; increased transportation options; and community engagement, including extensive housing developments. These enhancements will benefit the entire community and strengthen Big Sky's reputation as one of the top mountain resort destinations in the US. VBS continues to support the Resort's messaging via its website, other owned media channels and social media platforms, in addition to promoting sports and activities beyond alpine skiing that the destination has to offer. Again, winter 18/19 was a record year for Big Sky with Boyne/Big Sky Resort joining the IKON and Mountain Collective Pass products, the installation of the new Ramcharger-8, North America's first eight-seater Doppelmayr lift, increased air service into BZN (see below), and a growing greater Gallatin Valley. New season employee housing on the mountain was announced and construction will begin late spring 2019 to be completed for the 19/20 winter season along with the addition of a new parking facility for season passholders.

Increased Connectivity and Mobility— Southwestern Montana's Bozeman Yellowstone International Airport at Gallatin Field (BZN) set a passenger record in 2018 for the ninth consecutive year. It handled more than 1.34 million passengers an 11.9% increase compared to 2017. As the busiest airport in the state since 2013, and the eighth busiest airport in the Pacific Northwest, BZN handles 30% of all air traffic to and from Montana, one third of which is tourism related. BZN is served by Alaska, Allegiant, American Airlines, Delta, Frontier Airlines, JetBlue Airways, and United with year-round and/or seasonal non-stop service to 17 destinations in 14 states across the country. In 2018, there was a 130% increase in non-stop flights to New York/Newark, a 40% increase in daily year-round service to Dallas and a 20% expansion to Chicago, Minneapolis, Los Angeles and Houston. Located approximately an hour's drive north of Big Sky, BZN is a convenient airport for Big Sky travelers with regularly scheduled airport shuttles. A rehabilitation of the main runway in 2018 coupled with the construction of a 1,100 stall multi-use parking garage to be completed in June 2019, will better facilitate BZN's continued growth. The expansion and addition of air service, in other words, easier access, to Montana is a key factor contributing to increased visitation.

*Source: <https://bozemanairport.com/2018enplanements>

1D: Brand Pillars

Montana is the fourth largest state by area yet the 44th most populated with just over 1 million residents. From this spring MONTANA's Brand Pillars that illustrate why it is The Last. Best. Place.

- **Spectacular Unspoiled Nature** -Montana's first brand pillar of spectacular unspoiled nature is addressed within all aspects of our marketing efforts. Visit Big Sky's paid and owned media leverage large, vivid imagery to display areas within and around Big Sky and YNP.
- **Vibrant & Charming Small Towns** -The States' second brand pillar is vibrant & charming small towns that serve as gateways to our natural wonders. Visit Big Sky's main goal is to increase brand awareness and immediate visitation from national and regional markets during the summer and winter travel seasons capitalizing on the high visitation and awareness of YNP. VBS co-brands Big Sky with YNP in both winter and summer creatives. Big Sky is located 58 miles north of the west entrance of the park and truly serves as a gateway to those visiting YNP.
- **Breathtaking Experiences** -Montana's last brand pillar emphasizes breathtaking experiences by day and relaxing hospitality at night. We accomplish a seamless use of this brand within our paid and owned media. When allowable, our creative copy within our print, online, social and website contain inspirational descriptions of our recreational, lodging, dining and shopping amenities. Big Sky is a tourism-based economy, so our breathtaking experiences and relaxing hospitality is the base of our marketing message.

Big Sky, situated in southwest Montana exemplifies the MONTANA Brand Pillars, but so do many of the other amazing destinations throughout the state. What makes Big Sky unique? In May 2018 Visit Big Sky's Board of Directors adopted *Imagine Big Sky 2023*, its 5-year Tourism Master Plan developed with Destination Think! It included a Big Sky Place DNA™ Study to uncover what makes Big Sky, Big Sky. The goal was to determine the core identity of this place which is at the epicenter of all experiences and stories generated by this place, in addition to its alignment with the Montana Brand Pillars. The more aligned a destination's projected and perceived reputation, the greater its authenticity and credibility to attract, retain and convert visitors into storytellers on its behalf. And as we are all aware, the internet and social media have given visitors and their word-of-mouth the power to drive future visitation to our destinations.

What we learned about Big Sky is that it tells its story as a place where people integrate their lives with nature like nowhere else. Big Sky is an *R-destination*: It is a **Remote** place where people come to **RECREATE** first and foremost and **Reconnect** with nature and themselves; a place to **Reboot, Reload, Recharge, and Rejuvenate**, with an importance of showing **Respect** for the natural surroundings and the local community.

- **Big Sky is a unique ecosystem that provides diverse OUTDOOR RECREATION opportunities and interaction with nature right in its backyard**
- **Big Sky is changing – it is growing economically, with impacts on the social and cultural fabric of the community and the environment**
- **Big Sky is about BALANCE.** The essence of Big Sky's DNA is about the way people interact with nature here. Consumption of this beautiful place and its outdoor recreational offerings by visitors and residents alike needs to be done **RESPECTFULLY**, to preserve this special place for future generations. If not managed appropriately, Big Sky's quality of life, the natural beauty that draws people here, and its sustainability are in jeopardy.

In FY19 VBS took its first steps to translate the Tourism Master Plan strategy into an annual operating plan. It focused on the niche summer outdoor recreation activity of hiking. Specific, measurable, achievable, relevant, and time-bound (S.M.A.R.T.) goals were developed with corresponding actions based on available funding levels and executed with year-end evaluation of progress measured. VBS, along with 100 other destinations worldwide, participated in the inaugural Tourism Sentiment Index developed by Destination THINK! in October 2018. Market research consistently shows that word of mouth is and always has been the predominant influence on the travel decision-making process. In the world of online and digital communication, peer-to-peer conversations are one of the most trusted sources of information for selecting travel destinations and determining which experiences to try. Capturing the sentiment of word of mouth is a powerful way to monitor the success of a destination.

Source: <https://destinationthink.com/about-tsi/>

Describe your destination.

Inspiration –There can be no destination branding without locals, so an important part of the Big Sky DNA Study process was to engage and excite Big Sky locals in the conversation about tourism and its positive impact on the Big Sky economy and community. Our residents are passionate about this place. They choose to live where others vacation, in an evolving community born a tourist destination. Who better to share Big Sky and inspire others to come visit than our locals?! Taking this one step further, our past and present visitors, through positive word of mouth, also provide this inspiration for future visitors. Finally, VBS will inspire visitors by showcasing the Big Sky destination via its owned and paid media channels: a robust website (visitbigsky.com), social media accounts (Facebook, Instagram, Pinterest, YouTube), email marketing, digital advertising, publications (Official Visitor Guide, Big Sky Hiking Guide), and through personal interaction with guests calling in to or stopping by the Big Sky & Greater Yellowstone Visitor Information Center.

Orientation –As the fourth largest state by area, covering a vast and varied geography, orientation for our visitors is important. Familiarity with Montana as a destination is low as illustrated by the research done for MOTBD by Destination Analysts. It showed that 8 out of 10 people who come to Montana for the first time do so to visit one of the two National Parks – Yellowstone or Glacier. Big Sky located less than an hour's drive from Yellowstone, leverages this in summer marketing communications to orient our visitors. Visitors to the Park do not tend to stay in one place the entire time but move throughout the region so collaboration with Yellowstone Country Tourism Region and our five fellow CVBs (Belgrade, Bozeman, Livingston, Red Lodge and West Yellowstone) allows us to collectively brand a destination experience unlike any other in the country. This "packaged" itinerary, again, helps with visitor orientation. Only 4% of travelers are considering Montana as a winter destination and that is primarily to come and ski. Orientation in winter is done by the name/brand recognition built up by Boyne's Big Sky Resort through highly targeted channels. Joining the IKON and Mountain Collective Pass products this past year also helped orient the passionate skiing audience to the resort and Big Sky. Finally, #FlyBZN is a regional collaboration that VBS participates in dedicated to expanding and obtaining new air service into Bozeman Yellowstone International Airport. Its marketing support orients visitors by communicating direct flight markets into Bozeman/Big Sky. The orientation of guests into within the Big Sky destination itself is done by designating the Canyon – Meadow – Mountain areas and the related outdoor recreation activities in each. The VBS website, OVG and other communications reinforce this lexicon, as does the Wayfinding Signage on US Highway 191 and along MT Highway 64 into and around Big Sky.

Facilitation –Facilitation in tourism marketing is analyzing the needs and wants of prospective travelers, presenting destination options and ideas, and conveying messages to those travelers. Our national, multi-channel marketing campaigns will continue to facilitate information sharing with our consumers throughout the planning and purchase process with a mix of paid, earned and owned media. Further, VBS will continue to work with local tourism stakeholders to present new content as it develops to keep the messaging fresh and connect the potential visitor with their websites for additional information. The Big Sky & Greater Yellowstone VIC, VBS website and downloadable OVG, in addition to the 65,000 hard copy guides distributed throughout Montana and in ID, NV, UT, WY, are touch points and key pieces of communication that assist visitors. Yellowstone Country Tourism Region's guide and regional map are also helpful in facilitating a trip to our area.

Optional: Include attachments here

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

Demographic

For summer:

- Adults 25-65+
- HHI: Over \$75K+
- Well educated: College Degree and Families

For Winter, following MOTBD's Winter Enthusiast Demographics

- Adults 25-54
- Married with kids in the home
- HHI: \$75K+

Geographic

1. For SUMMER: For out-of-state include all direct flight markets that lead to Bozeman Yellowstone International Airport; Seattle, WA, Portland, OR, San Francisco, CA, Los Angeles, CA, Long Beach, CA, Salt Lake City, UT, Las Vegas, NV, Phoenix, AZ, Denver, CO, Dallas, TX, Houston, TX, Minneapolis, MN, Chicago, IL, Atlanta, GA, New York, NY, Newark, NY. Include full state geographies that border Montana and include more than one top 20 DMA (based on Google Analytics and Arrivalist Research). For in-state prioritize delivery in Billings, Great Falls and Missoula markets.

2. For WINTER: For out-of-state include all direct flight markets that lead to Bozeman Yellowstone International Airport; Seattle, WA, Portland, OR, San Francisco, CA, Los Angeles, CA, Long Beach, CA, Salt Lake City, UT, Las Vegas, NV, Phoenix, AZ, Denver, CO, Dallas, TX, Houston, TX, Minneapolis, MN, Chicago, IL, Atlanta, GA, New York, NY, Newark, NY. Include full state geographies that border Montana and include more than one top 20 DMA (based on Google Analytics and Arrivalist Research). For in-state prioritize delivery in Billings, Great Falls and Missoula markets.

Big Sky's summer and winter target geographies are different due to reason for visiting – Yellowstone or skiing – and the mode of transportation to get here. Summer has a heavy in-state as well as drive in market from not only adjacent states but from throughout the US due to the increase in travel via RVs and sprinter vans. Direct flight markets are key as well with Salt Lake City one of specific importance due to many international and domestic travelers choosing to fly into it and then drive to the West Entrance of Yellowstone from there. During the winter months non-resident visitors are primarily flying into BZN to come to ski, so again direct flight markets are key. However, we cannot overlook Montana resident travelers as an significant audience coming to Big Sky to ski.

Psychographic –Educated travelers and Families have been identified as the high potential visitors to Big Sky. They live in urban areas, are married, educated affluent millennials who likely have children. Dining out, comfortable lodging and outdoor-focused experiences are part of their ideal vacation. They enjoy learning about local history and cultural sights and have a desire to explore the Rocky Mountains and YNP.

By focusing on Big Sky's unique natural beauty, plethora of both winter and summer activities, and proximity to the America's First National Park, we intend to develop the creative aspect of our marketing efforts to portray a sense of comfortable isolation that attracts free-spirited adventurers as well as travelers looking to experience the natural world without sacrificing modern comforts. We will aim to create an allure for travelers willing to commit their time and resources to traveling to our distinctive location, for we are certain if they visit once they will surely return, maybe even for a lifetime.

b. What are your emerging markets?

Emerging Markets – Bozeman Yellowstone International Airport states Delta projects to increase seats by 15-20% primarily in the Minneapolis/St. Paul and Salt Lake City markets as well as adding seasonal Detroit service beginning summer 2019. New service initiated in 2018 to the LA Basin on JetBlue and Allegiant are expected to stimulate demand in this region over and above the daily service by United and weekend service by Delta.

*Source: <https://bozemanairport.com/content/documents/2019-Enplanement-Projections.pdf>

Continued growth in international visitation to YNP from China, Japan, India and other countries is an opportunity for Big Sky as a Gateway Community. However, international tourism to the U.S. has been on the decline in the Donald Trump era, and the travel slump comes at a cost. The most recent data from the National Travel and Tourism Office shows inbound visitors to the U.S. dropped to 41 million in 2017, a 4 percent decrease from 2016, and travel spending dipped around 3 percent. NBC News reported that decline cost the nation about \$4.6 billion in lost spending and 40,000 jobs. In 2018, international arrivals to the U.S. totaled approximately 80 million with about half of whom came from overseas. Spending by international visitors in the U.S. produced \$256 billion in export income resulting in a \$69 billion international trade surplus for the U.S. economy. However, despite remaining a top export and trade surplus generator, international visitation to the U.S. and travel spending by foreigners have continued to slow since 2016. The United States' share of total international arrivals is 5.6% (down from 6.4% in 2015). Reauthorization of BRAND USA, along with a rebranding and expansion of the Visa Waiver Program to the Secure Travel Partnership are top priorities for the U.S. Travel Association to combat the decline.

*Source: https://www.ustravel.org/system/files/media_root/document/Research_Fact-Sheet_Travel_and_Trade.pdf

https://www.ustravel.org/system/files/media_root/document/Research_Fact-Sheet_US-Travel-Answer-Sheet.pdf

Optional: Include attachments here.

c. What research supports your target marketing?

Research –VBS utilizes research provided by the Montana Office of Tourism and Business Development (MOTBD) including the most recent Winter Enthusiast Report (2018) and the Montana Destination Brand Research Study (2016). Further, it leverages the updated tourism statistics and special reports from Tourism Advisory Council (TAC)-selected research projects provided annually by the Institute for Tourism & Recreation Research (ITRR). The DestiMetrics lodging platform utilized by VBS in partnership with nine lodging partners in destination provides up-to-date occupancy and rate data, and this, coupled with website and social media analytics, past marketing campaign effectiveness and visitor information from guests to the Big Sky & Greater Yellowstone Visitor Information Center are all used to inform marketing decisions. VBS also works with agencies to gather market-specific research. Summer visitor experience research will be conducted by Destination Analysts beginning in May 2019 to uncover pain points on the traveler journey to Big Sky from “touch down to take off,” as well as the overall experience after the trip. As mentioned earlier, the Tourism Sentiment Index is a 3-year research project that analyses the change in word-of-mouth about the destination online from year to year by season and outdoor recreation activity. The second report will be produced in October 2019.

Imagine Big Sky 2023, the five-year Tourism Master Plan for VBS was adopted May 2018. In FY19 VBS took its first step to operationalize this strategy into an annual plan. Specific, measurable, achievable, relevant, and time-bound (S.M.A.R.T.) goals will be developed with corresponding actions based on available funding levels and executed with year-end evaluation of progress measured.

1. Develop a sustainable OUTDOOR RECREATION experience

Goal: By 2023, Big Sky will have grown its product offering into a unique, competitive and sustainable outdoor recreation destination experience.

To develop the experiences that align with our Place DNA™ and adhere to our commitment to sustainability and resident quality of life will require a collective effort lead by VBS. The organization will develop what it promotes and promote what it develops.

Actions:

- Leverage Big Sky's Place DNA™ working collaboratively to infuse it across the destination to create a unique Big Sky experience that is impossible for others to copy.
- Expand the organization's focus from strictly promotion toward the development of a sustainable destination tourism experience.
- Lead and support all stakeholders to create memorable experiences that produce raving fans.
- Monitor the visitor experience to benchmark and strengthen the destination experience.
- Advocate for the protection of Big Sky's natural environment by supporting organizations, policies, standards and guidelines that encourage sustainability.
- Prioritize and measure the attitude of residents towards tourism on an ongoing basis to ensure communication about on-going efforts to maintain the balance between growth and quality of life is effective.

2. Engage in destination promotion to broaden Big Sky's reputation BEYOND WORLD-CLASS WINTER

Goal: By 2023, Big Sky's reputation for sustainable, outdoor recreation beyond The Biggest Skiing in America®, especially in high-value audience segments, will reach beyond that of a ski resort destination.

Actions:

- Identify clusters of products and experiences as a basis for niche audience segmentation.
- Transition away from traditional paid advertising methods, towards more modern, online and digitally-focused marketing and promotion, and earned media to segment Big Sky's audience and cost-effectively target the people who will truly connect with the destination. The new and improved Visitbigsky.com website launched in August 2018, and it, as well as VBS' social media channels have played a big role.
- Invest in integrated marketing technology that enables VBS to scale its activities efficiently.
- Identify and address pain points for Big Sky's target audience in the path-to-purchase as well as on the customer journey from touch down to take off.
- Enable and encourage others to share stories about Big Sky's experiences to generate positive word-of-mouth and online advocacy.
- Establish a communication framework to monitor word-of-mouth conversations about Big Sky and to amplify the most aligned stories for maximum reach and impact.
- Develop a set of marketing metrics to measure sentiment from target audiences towards the destination to ensure Big Sky's reputation strengthens over time.
- Conduct research to establish a baseline and continue to do so to ensure on-going efforts are successful.

3. Establish Visit Big Sky as the leader in the tourism collective

Goal: By 2023, Visit Big Sky will have successfully implemented this strategy through leading a collaborative effort of all stakeholders including its industry peers, resulting in a vibrant local economy and a healthy and sustainable community for Big Sky.

The VBS vision is ambitious because VBS is a relatively small player in a highly-competitive environment alongside its other seventeen mountain resort destinations which participate in the DestiMetrics lodging platform including Jackson Hole, Sun Valley, and Park City just to name a few. Big Sky's competition relies on well-funded destination marketing organizations which employ talented people. Turning a vision into reality requires focused, collective action. VBS must act as the custodian of this strategy. Without this mandate, the leadership required to align all stakeholders and to drive cohesive action does not exist. VBS will put people, partners, systems and processes in place to follow world-class destination marketing practices. It cannot outspend its competition, but it can outsmart them. To continuously build trust with all stakeholders, VBS will put measurements and communication in place to ensure everyone understands how it is progressing as an organization and as a destination.

Actions:

- Develop a stable source of funding that will allow VBS to implement this strategy and continue to lead responsible tourism growth in Big Sky.
- Create a set of benchmarks and key performance indicators (KPIs) to measure the impact of tourism on economic, environmental and quality of life (social/cultural) factors in Big Sky.
- Optimize the organization to ensure that our team and partners have the capacity and capabilities to enable them to deliver on this plan.
- Work closely with the community and the statewide tourism industry to deliver the priorities outlined in this document. This includes regular reviews of this plan to consider new ways of creating value.
- Correlate success indicators to monetary value to provide an indication of the economic impact of our investments.
- Educate and advocate for the tourism industry on a local, state and national level, sharing its economic impact on the health of the local and broader U.S. economy to ensure its future.

VBS will track progress by measuring four types of performance

1. **Visitor experience:** Are visitors satisfied with their visit to the destination?
2. **Consumer engagement:** Is word-of-mouth promotion improving?
3. **Operator effectiveness:** Are there opportunities to improve experiences?
4. **Corporate transformation:** Is the DMO built to adapt to modern marketing?

In the past, VBS performance measures have focused on tracking increases in the following metrics: Montana Lodging Facility Use Tax collections, local Big Sky Resort Tax collections, number of skier visits, number of visitors to Yellowstone National Park overall and through the West Entrance specifically, passenger totals into Bozeman Yellowstone International Airport (BZN) and Montana Department of Transportation traffic counts on US Highway 191. Another lesson learned through the Tourism Master Planning process is that MORE is not necessarily better. It is about QUALITY versus QUANTITY of visitors. VBS will continue to monitor these metrics, but its focus will be on attracting the RIGHT type of visitor who will stay longer, spend more and have respect for the destination, local community and its residents, so new metrics as indicated above are needed.

Big Sky cannot thrive as a sustainable tourism destination without an organization to manage the overarching visitor experience and resulting word-of-mouth influencing the overall destination brand, and to engage local residents so that they understand and embrace the tourism economy. That requires stable funding. VBS is the organization that was birthed in 2013 to fill this role. To be successful, all stakeholders need to understand and embrace *Imagine Big Sky 2023*, VBS's Tourism Master Plan. **Collectively Big Sky will work to develop authentic tourism experiences, improve its reputation, attract the right visitors, and together with residents, grow its community in a sustainable way to preserve quality of life.** By leading the community through the plan outlined in this document, VBS will be able to grow tourism responsibly. This approach will mitigate business risk and provide a significant competitive advantage for Big Sky's tourism industry.

Below are *The Rising Trends in Travel and Tourism for 2018* per momondo (purchased by Priceline) carryover into 2019.

- **Uncharted Destinations**– Rise of comparable but alternative, off the beaten path destinations, less-crowded, less-expensive
- **Authentic Culinary Tourism**– Moving away from expensive dining at the most highly acclaimed restaurants to more authentic food experiences
- **Achievement Is the New Experiential**– Travelers will look to achieve a goal or accomplish something they have never done before
- **Work and Travel**– Going from “bleisure” travel meaning extending a business trip by a few days to digital nomad, working full-time or part-time for a month or more
- **Community-focused Hotels**– Large communal spaces for social travelers
- **New Hotel Technology**– Improving Wi-Fi services with higher speeds and wider bandwidths, AI, automated check in/out and mobile application to cater to needs inside/outside the hotel
- **Multi-generational Travel**
- **Conscious Travel Is In**– Sustainable travel was one of the most talked about buzzwords in 2017, but 2018's newest travel term will be “conscious travel,” shifting the focus from a traveler's carbon footprint and the local economy, to include an added element of community. *“More than ever, travelers will be mindful of their impact on the economy as well as the lives of those living in the destination that they are visiting. In addition to making a conscious effort to go on eco-friendly tours and buy organic produce at local markets, travelers will be spending their money in ways that benefit the local economy and community, rather than large corporations and foreign investment companies. That includes opting for small boutique hotels over big chain hotels and local shops over international malls.”*

Big Sky is poised to benefit from these trends as the *Imagine Big Sky 2023* plan illustrates.

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

MOTBD co-ops related to agency services assistance due to the limited staffing resources here in Big Sky are valuable, for media placement as well as more regional research. Joint public relations efforts, FAM Trips and participation in international travel trade-shows to address international markets can only be done via Joint Venture for Big Sky. In the future, the opportunity to partner on any video production being done by MOTBD in Big Sky would be greatly appreciated.

Optional: Include attachment here.

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

Visit Big Sky/Big Sky CVB will continue to work with organizations, businesses, Yellowstone Country Tourism Region and the six other CVBs within it to combine our marketing efforts in order to increase tourism to the region at large. Joint Ventures have included a regional/local Trip Advisor program, co-op print and digital in winter/skiing publications, a statewide digital campaign and regional FAM Trips. For 2019, YC and Big Sky have partnered to host one of the three TBEX evening dinner/events. Event sponsorship of lifestyle events in specific drive market mountain resort communities such as Jackson Hole and/or Park City would be a new potential opportunity to partner.

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

In FY19 VBS partnered with MOTBD on three joint ventures: Digital media buy via LiveIntent for summer digital ads, Agency Services for summer marketing campaign execution, IPW meeting in Anaheim, CA in June 2019. As mentioned above, this partnership allows Big Sky to engage in activities that it might not be able to afford. Yes, they were successful and we will continue to take advantage of the opportunities put forth by the state and Yellowstone County. VBS also participated in IMEX in Las Vegas in FY19 for the first time in partnership with Glacier Country. Unfortunately, it falls over the TBEX weekend in FY20 so Big Sky has opted out of the event this coming year.

Optional: Include attachments here.

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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
Consumer	Print Advertising	Visit Big Sky will use a mix of print together with social and online advertising during FY20. We will strategically leverage the CVB funds to compliment all marketing efforts of VBS while following all TAC rules and regulations. During FY20, VBS will continue to execute a national and regional key market warm season campaign with a focus on educating potential visitors about our proximity to YNP and highlighting our unique summer activities and accommodations.	As VBS continues to increase its online and digital marketing efforts, it will continue to use print advertising as a double sword strategy to one be a compliment and two push traffic to online/digital content. Print also has the power to rise above the heavily concentrated digital scene and leave a lasting impression on consumers with a tangible piece of material. Source: https://www.forbes.com/sites/forbescommunicationscouncil/2018/03/02/does-print-still-have-a-place-in-the-future-of-advertising-10-experts-weigh-in/#4415c6155fc6	KPI's include number of leads generated from print ads, number of impressions, engagements and clicks on all social ads associated with the campaign, as well as monitoring the success of any expanded and/or new flight service into BZN.	Print focuses on YNP targeted publications which generate leads for individuals planning a trip within the next year. The advertisements will market Big Sky as a gateway community to YNP within an hour's drive in the summer and focus on the outdoor recreation product, specifically hiking, that Big Sky has to offer. Secondly, print dollars will support air route development in partnership with private Big Sky businesses, as well as the Bozeman CVB and TBID with placement in market-specific publications. Focus is on supporting expanded and new direct flight service from other states into the Bozeman Yellowstone International airport.	\$40,990.00		VisitBigSky_YellowstoneJournal_2019.pdf
Consumer	Website/Internet Development/Updates	Today's tech-savvy traveler relies heavily on the internet to dream about, plan, book, and share in travel experiences. In FY19, a new website was developed for VBS to better showcase the Big Sky destination in comparison to the other 17 mountain resort communities in our competitive set. The goal was to provide with a state-of-the-art digital destination resource. The new site updates included: a digital visitor guide with interactive links, leads tracking capabilities, upgraded business listings and event calendar, improved email marketing connectivity, mobile optimization, trip	Today's modern consumer is looking to the web to research, plan and book their travel experiences. DMOs aim to reach these consumers to inspire travel and encourage an increase in spending. According to Internet Travel & Hotel Booking Statistics 148.3 million travel bookings are made on a website each year with 65.4% of those bookings taking place on brand websites. *Source: https://www.statisticbrain.com/internet-travel-hotel-booking-statistics/ Nielsen research found that travelers spend an average of 53 days visiting 28 different websites over a period of 76 online sessions before booking their travel plans. HuffPost reports that around 95% of leisure travelers read at least seven reviews before booking travel accommodations, tours and activities in a specific destination. *Source: http://www.cmo.com/features/articles/2017/5/5/15-mind-blowing-stats-about-digital-trends-in-travel-hospitality-1p-ddm.html#gs.vS0fp=E	KPI's will include the use of Google Analytics to measure the following; number of website visitors, unique visits, time spent on the site, pages viewed per visit, bounce rate, partner website pass through, and exit rate. SEO	A usable, trackable and aesthetically pleasing website is key in destination branding to get visitors to choose to visit Big Sky. Working with a knowledgeable website development company has ensured that the VBS website is utilizing all the latest technology to keep up with the ever-changing digital landscape and consumer demands. An optimized website draws more traffic to the site, inspires travelers to plan a trip, and its functionality increases time on site and orients the visitor to the destination. Keeping content	\$11,620.00		

		<p>planning resources, an overall improved user interface and site layout to support organic and paid SEO efforts. Local photographers, videographers and bloggers were used to update the website content that highlights Big Sky's outdoor recreation experience, businesses, events, natural beauty and amenities. FY20 funding will maintain the optimal functionality of the website.</p>	<p>The method of planning and booking is becoming heavily skewed toward digital. Digital tools allow for greater analytical monitoring to see what visitors are looking for and did your destination provide that need which will allow for continued improved performance for the future.</p>	<p>will also be used to measure the website ranking.</p>	<p>current gives each visitor the most up-to-date activities, events and accommodations that Big Sky has to offer. The use of analytics to monitor and serve up additional information to potential visitors is fundamental and ensure our marketing dollars are spent appropriately.</p>			
Consumer	Online/Digital Advertising	<p>Online advertising includes search engine marketing (SEM), many types of display advertising (including web banner advertising), and mobile advertising. It provides meaningful scale, cost-efficiency, frequency and has the ability to self-optimize. It also intercepts audiences within their core digital environments where consumers are actively looking for information. We can maximize impressions while leveraging targeting platforms to drive greater effectiveness and efficiency.</p>	<p>The Montana Destination Brand Research by Destination Analysts (2016) demonstrated the very low awareness of Montana by potential visitors.</p>	<p>Insert copy here about how we will measure success based on the method used to market air route development digitally/online.</p>	<p>VBS online digital monies will reinforce air route development print efforts in educating travelers about how easy it is to get to Big Sky via direct flights. The ease of getting to a destination dramatically impacts visitation. Awareness of Montana is low per Destination Analyst research with potential visitors knowing very little. This allows VBS to provide orientation to those visitors looking at Montana to plan their trip.</p>	\$9,500.00		
Consumer	Opportunity Marketing	<p>Dependent on the opportunity - varied.</p>	<p>VBS every year has had opportunities presented to it that it was able to take advantage of due to this pool of funds.</p>	<p>This will vary depending on the type of project, but we plan to measure the success according to industry standards and with metrics that are trackable.</p>	<p>Opportunity marketing funds are just that. To take advantage of unforeseen opportunities when they present themselves. This could include any upcoming co-op opportunities with local tourism stakeholders, new strategic partners or in response to emerging markets.</p>	\$10,000.00		
Consumer	Photo/Video Library	<p>VBS will work with local photographers and videographers to continue to grow and update its content library of photos and videos. These assets will be used to populate the website with updated imagery, as well as in advertisements and on</p>	<p>According to <i>The State of the American Traveler Study</i> by Destination Analysts, about 58.2% of travelers visited a destination's CVB website before they decided to travel to the destination. Around 54.6% used some form of social media to make travel plans including on-line videos and phone apps. About 19.2% of those travelers used online video content to plan their trip and 19.5% used social photo sharing websites. The Internet is of course extremely important, with 64.0 percent saying they</p>	<p>VBS will measure the number of new assets added to its library during FY20, track the success of digital advertisements through KPI's using the new images or videos,</p>	<p>As a destination management and marketing organization, our job is to sell a place. This is done via visual images and video content both important influencers in aiding the consumer in their decision-making process when choosing a destination. These visuals showcase the natural beauty and splendor</p>	\$0.00		

		social media. Having new content year over year is vital to stay top of mind with travelers and inspire them by serving up continually refreshed and new content.	get their destination inspiration from one of the three primary digital resources tracked (online media, social media or online video.)	engagement on social posts using the new assets, as well as on website pages that feature new videos or photos.	of Big Sky. As an outdoor recreation destination, photos and videos provide the ability to drive visitation through the visual representation of the myriad of activities in both summer and winter.			
Consumer	Social Media	VBS will use a variety of social media reporting tools (Sprout Social) to monitor and report across multiple social media channels including Facebook, Instagram, Twitter and Pinterest. Sprout Social will provide insights into social media conversations revolving around the VBS brand, allowing us to increase interaction with potential and current visitors. A new tool for VBS is Hey Orca, a scheduling app that will allow us to create, plan and post to all three of our current social media channels. This increases staff efficiency and campaign effectiveness.	VBS has found great success in sharing the unique offerings of our area on social media. This will be a continued focus in FY20 as we will continue to connect with visitors, influencers and stay current on other destinations social platforms and industry trends. Year-over-year we have seen a rise in number of followers, engagements on posts, comments, etc. In FY18 we began adding two hashtags to almost all of our advertising and marketing materials to increase engagements within current followers that we know are already interested in our brand and destination. Below are our current social media statistics: <ul style="list-style-type: none"> • Visit Big Sky Facebook: 20,111 followers - increase of 11% from FY19 • Visit Big Sky Twitter: 2,951 followers - increase of 3% from FY19 • Visit Big Sky Instagram: 10,504 followers - increase of 8% from FY19 • #visitbigsky - 10,677 hash tagged posts 	Success will be measured by following industry standards and specific KPI's including increased likes, follows, @mentions and hashtag usage.	In today's digital world, word of mouth reigns. The visitor's ability to influence future potential visitor's via social media cannot be denied. Increasing awareness of the VBS brand via social media channels will help extend its reach to potential new visitors. This method connects the destination with influencers contributing to the digital conversation being had online about our destination. Further, user generated content from these channels garnered by VBS help to promote the authenticity of the destination through the eyes of the actual visitors.	\$8,288.00		
Consumer	Joint Ventures	Dependent upon opportunities provided by the Yellowstone Country Tourism Region and MOTBD. Typically, it has been digital advertising co-ops, support of ad agency services and regional FAM trips.	In FY19 VBS participated both winter and summer joint ventures with both Yellowstone Country Tourism Region and MOTBD. These allowed us to extend our marketing efforts both in and out of state. From our Winter co-op campaign with Yellowstone Country we saw 88,872 impressions and 152 clicks to our website. We anticipate seeing even better results for our summer JV that launches in June.	First, we consider the opportunity to partner in these joint ventures a success within itself. Specific measurements will be dependent upon the joint venture opportunity itself. However, past programs measured number of leads generated, ad impressions, and clicks throughs to the website.	VBS will work in partnership with Yellowstone Country, the six other CVBs in the region and MOTBD to leverage all parties' marketing dollars. As we know, visitors traveling to Montana do not spend their time all in one place, generally speaking. Driving scenic byways is one of the Montana brand pillars and speaks to the need to partner beyond the local destination with our region and the state.	\$10,000.00		
		VBS utilizes MailChimp to build its email marketing database, create email campaigns, and targeted marketing communications. Its current contact list is segmented into three	Email marketing is one of the most effective channels to help reach potential visitors and convert them to a booked traveler. Monitoring the success of campaigns is very	VBS will measure success by the number of leads generated,	For FY20 VBS will increase its email marketing programs. Currently visitors can sign up for an e-newsletter on the VBS website thus capturing their contact data.VBS also collects leads through paid			

Consumer	Electronic Adv - Newsletter, E-blast	different consumer facing groups; website leads, Yellowstone National Park leads and all other print/digital advertising leads. The hope is to customize content based on the interest of the visitor.	simple and A/B testing can be used to create more effective messaging. 87% of marketing consider email to be the most effective tool in lead generation.	open rate, click-through rate, bounce rate and unsubscribed rate.	advertisements in both digital and print media. At present, our e-newsletter is one dimensional. Plans are in place to segment and serve up targeted messaging by season and activity.	\$1,800.00		
Consumer	Billboards/Out-of-Home	VBS has a prominently placed billboard on US Highway 191 traveling South towards Big Sky. It calls out the Big Sky & Greater Yellowstone Visitor Information Center 29 miles ahead at the intersection of Montana Highway 64. This billboard allows VBS to promote its summer niche hiking outdoor recreation activity, as well as the fact that there are facilities ahead. There is no cell service from the entrance to the Gallatin Canyon to the VIC more from the VIC to West Yellowstone. So, the ability to use your phone and public restroom facilities during the 90-mile trip is a key piece of communication valuable to the traveler.	Billboards that line US Highway 191 going South to Big Sky see an average of 27,000 impressions weekly. This is a low maintenance marketing tactic with a high ROI.	VBS will measure traffic counts on US Highway 191 and the number of guests who visit the Big Sky & Greater Yellowstone Visitor Information Center.	Out-of-home advertising is inspirational, and, in this case, it is also providing orientation to travelers. Being that there is only one road leading to Big Sky from BZN, US Highway 191, all cars traveling to the Big Sky area and/or YNP are exposed.	\$8,100.00		
Consumer	Digital Asset Management/Aquisition	VBS uses Crowdriff and Media Hub a user generated content platform and content management system, to source this content, store it, and serve it up easily. It also makes it easy for third party content providers to upload assets into the system for VBS's use.	According to Crowdriff, today, visuals have more influence over people's decisions than any other content type. Assets generated through the Crowdriff platform can be used to populate self-optimizing website galleries, email newsletters, ad creative, social media channels, and even live photo displays. As stated in a recent article from Marketing Land, people are on social media now more than ever and with that sharing more than ever. "By harnessing and showcasing these stories, brands are able to connect with customers in a more authentic and personalized way — lifting engagement, strengthening consumer trust and ultimately driving sales." By utilizing and showcasing user-generated content, we are allowing our most passionate visitors to become our personal brand advocates, sharing their insights on our community, outdoor recreation products, services and more. https://crowdriff.com https://marketingland.com/ugc-brands-new-years-content-resolution-2017-206106	VBS will measure success by the number of assets required and engagement in using those assets on its website, social media channels and in other marketing campaigns.	Our product is our place. To represent Big Sky, an ever-changing destination, new content is constantly required and the ability to store that content so that it can be easily accessed is critical. This content populates the VBS website, its social media pages and is used to develop other marketing campaigns.	\$12,000.00		
Group Marketing	Travel/Trade Shows	VBS will continue to build upon its investment in international and domestic travel trade sales by attending shows during FY20. Expenses include registration fees and travel, meal and lodging. Tradeshow include but are not	IPW: IPW is produced by the U.S Travel Association, and is the travel industry's premier international marketplace and the largest generator of travel to the U.S. - During three days of intensive, prescheduled business appointments, U.S. travel executives meet with over 1,200 international and domestic buyers from more than 70 countries. Since IPW 2019 will take place in Anaheim more buyers interested in the west will be attending; therefore, we want to have a big presence at the tradeshow. Go West Summit: Go West's successful event formula and comprehensive, well-rounded program are designed to provide destinations with every available opportunity to negotiate business contracts, establish relationships, and gain a better understanding about a variety of topics relevant to the tourism industry. Suppliers representing destinations, properties and attractions from the American West and international tour operators participate in multi-day networking sessions, familiarization trips and Adventure Day activities with the goal of showcasing the destination for future tourism business. By matching tour operators from around the	Measurement will be tracked by number of appointments held during the show, as well as leads generated as a result for local	VBS represents the destination as a whole and connects to prospective travel wholesalers and retailers, both FIT and group, on behalf of small businesses who otherwise	\$10,500.00		

		<p>limited to:</p> <ul style="list-style-type: none"> • IPW • Go West Summit • IRU 	<p>globe with Western U.S.-based suppliers in a one-on-one, business-friendly environment, Go West Summit is an event where exciting, profitable and lasting relationships are born quoting "Go West combines the conveniences of a large event with the intimacy of a smaller event, and we pride ourselves on our low supplier to tour operator ratio."</p> <p>IRU: IRU is produced by RMI, with an intensive structure designed to provide conversations with over 80 organizations from around the Real America region and nearly 50 international domestic buyers from more than 10 countries.</p>	lodging partners.	would not get exposure.			
Group Marketing	Multi-Media Marketing	<p>VBS will have a presence on the Visit the USA website in association with the National Parks and more specifically, YNP as a Gateway Community. The page is translated into multiple foreign languages serving up the Big Sky destination in their native tongue.</p>	<p>Continued growth in international visitation to YNP from China, Japan, India and other countries is an opportunity for Big Sky as a Gateway Community. However, international tourism to the U.S. has been on the decline in the Donald Trump era, and the travel slump comes at a cost. The most recent data from the National Travel and Tourism Office shows inbound visitors to the U.S. dropped to 41 million in 2017, a 4 percent decrease from 2016, and travel spending dipped around 3 percent. NBC News reported that decline cost the nation about \$4.6 billion in lost spending and 40,000 jobs. In 2018, international arrivals to the U.S. totaled approximately 80 million with about half of whom came from overseas. Spending by international visitors in the U.S. produced \$256 billion in export income resulting in a \$69 billion international trade surplus for the U.S. economy. However, despite remaining a top export and trade surplus generator, international visitation to the U.S. and travel spending by foreigners have continued to slow since 2016. The United States' share of total international arrivals is 5.6% (down from 6.4% in 2015). Reauthorization of BRAND USA, along with a rebranding and expansion of the Visa Waiver Program to the Secure Travel Partnership are top priorities for the U.S. Travel Association to combat the decline.</p> <p>*Source: https://www.ustravel.org/system/files/media_root/document/Research_Fact-Sheet_Travel_and_Trade.pdf</p> <p>https://www.ustravel.org/system/files/media_root/document/Research_Fact-Sheet_US-Travel-Answer-Sheet.pdf</p>	<p>VBS will measure success by click's its own landing page on the Visit the USA website.</p>	<p>Big Sky is a Gateway Community to YNP, a world-renowned bucket list destination. Travelers from around the globe come to see America's first National Park. Located only an hour's drive north of the park's West Entrance, Big Sky has the opportunity to take advantage of the people coming here. Presence on the Visit the USA website allows VBS to engage these potential visitors in the trip planning process.</p>	\$25,000.00		
Marketing Support	DMO Program Participation	<p>Membership dues, registration fees and other related programming costs.</p>	<p>DI's members become connected to a community of over 600 official destination marketing organizations that collectively command more than \$2 billion in annual budgets around the world. DI is the passionate advocate and definitive resource for official destination marketing organizations and professionals worldwide.</p> <p>*Source: DI</p>	<p>VBS plans to continue training with DMAI to further continuing education of its staff and maintain the accreditation of the DMO. Success will be measured by staff participating in said trainings and renewal of the DMAI membership annually.</p>	<p>Destinations International is about serving destination marketing professionals first and foremost. Together with its members and partners, DI represents a powerful forward-thinking, collaborative association; exchanging bold ideas, connecting innovative people, and elevating tourism to its highest potential. It supports the profession of destination marketing, provides peer to peer idea exchange, access to research on visitor centers, training for meeting professionals and the travel trade. Big Sky is requesting funding for membership fees and conference registration fees.</p>	\$1,500.00		
		<p>To perform this job successfully, the VBS Marketing Manager must perform these essential duties satisfactorily:</p> <ul style="list-style-type: none"> • Assist with the development and implementation of annual comprehensive marketing 						

Marketing Support	Marketing/Publicity Personnel	<p>plans for the Big Sky destination working directly with the CEO and third-party agencies to fulfill the visions and goals of the organization.</p> <ul style="list-style-type: none"> • Work with third-party agencies to execute digital marketing campaigns that accomplish goals and clearly communicate the brand's identity. • Coordinate exciting and energetic social media campaigns that build an engaged community of followers; expand email marketing efforts. • Maintain and monitor the annual marketing program budget with strict compliance with all State of Montana CVB funding rules and regulations, local Big Sky Resort Area District Tax Board policies and procedures, and any related grant funding guidelines. • Help manage public relations relationships and identify unique opportunities to create appropriate exposure. • Assist in the development of visitor experiences that accurately and consistently deliver 	<p>VBS serves as the destination management and marketing organization for the community of Big Sky. Therefore, having a specific staff personal dedicated solely to marketing duties is essential for the operation of VBS. As stated by Small Business Chronicle, "The link between manpower and company projects is fairly simple: Manpower is proportional to productivity." Ensuring that VBS has enough staff to properly execute all its projects, duties, contracts, etc. is undeniable and ultimately mandatory.</p> <p>Source: https://smallbusiness.chron.com/importance-company-manpower-23763.html</p>	<p>The VBS Marketing Manager's effectiveness will be determined by how s/he meets expectations as detailed in the job description.</p>	<p>The VBS Marketing Manager reports directly to the CEO and will assist with the development/implementation of an integrated, year-round marketing and communications plan for the Big Sky destination that speaks to consumers, the travel trade, media and residents of Big Sky. Much of this will be done through acting as the account manager contact for existing VBS agency relationships. In addition, this person will be the lead project manager working closely with Big Sky tourism stakeholders, Yellowstone Country Tourism Region and its six other Convention & Visitor Bureaus (CVB) to promote and better facilitate the visitor experience in the region, as well as throughout the state of Montana in partnership with the Montana Office of Tourism and Business Development (MOTBD). Additional responsibilities include maintaining and monitoring the annual marketing budget, analyzing and reporting on the effectiveness of all marketing communications and providing administrative support in working with the VBS Board of Directors.</p>	<p>\$59,500.00</p>		<p>FY19_VISIT BIG SKY_Marketing Manager.docx</p>
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		<p>appropriate brand messages and ensure Visitor Information Center (VIC) seasonal staff are educated on that experience.</p> <ul style="list-style-type: none"> • Develop a training program related to the Big Sky experience for VIC staff to undergo in order to better serve visitors. • Collaborate with Yellowstone Country and six other CVBs within our Tourism Region to better facilitate the visitor experience. • All other duties and responsibilities as assigned. <p>Job Description - Areas of Responsibility (including, but not limited to): attached separately</p>						
Marketing Support	Administration	<p>The costs associated with administration cover partial salaries for the 0.5 CEO and 0.5 compliance manager along with other miscellaneous administrative expenses per the 20% requirement of FY20 projected income.</p>	<p>Within the administrative bucket, VBS employees a 0.5 CEO and a 0.5 compliance manager. A CEO is vital to an organizations success and gives an anchor for the organization to build off of and a dedicated leader and decision maker. The duties of the CEO include but are not limited to making major corporate decisions, managing the overall operations and resources of a company, acting as the main point of communication between the board of directors (the board) and corporate operations, and being the public face of the company.</p> <p>Source: https://www.investopedia.com/terms/c/ceo.asp</p>	<p>VBS will measure success based on the employees meeting expectations as detailed in their job descriptions with respect to financials as determined through the annual audit conducted by MOTBD.</p>	<p>Big Sky is a place. VBS promotes the place, and to do so, requires people.</p>	\$59,200.00		
		<p>The Big Sky & Greater Yellowstone VIC employees a full time coordinator and two part time travel counselors to assist visitors. Staff spends an estimated 8-10 minutes per group assisting visitors with directions, outdoor recreation opportunities,</p>	<p>Statistics from the Big Sky VIC during the 2018 calendar year are as follows:</p> <ul style="list-style-type: none"> • Total number of visitors: 4,173 • Top visiting states: MN, TX, CA, CO, WA, NY, FL, MI • Total hours open: 1,396 hrs. • Top visiting countries: Canada, Germany, China, Argentina and the UK 	<p>Measurability for the Big Sky & Greater Yellowstone VIC includes tracking the</p>	<p>The Big Sky & Greater Yellowstone VIC is a vital part of the Big Sky Community for visitors and residents alike. Big Sky currently lacks a sense of arrival upon reaching the intersection of US Highway 191 and MT Highway 64. The Corner Property was sold last summer and is currently under renovation with the new ownership. The</p>			

Marketing Support	VIC Funding/Staffing/Signage	accommodations, dining and activities. Travel counselors are committed to giving high quality personalized service on a year-round basis to assist visitors as a Gateway Community to YNP in the summer and ever increasingly to those coming to ski in winter.	The Institute for Tourism & Recreation Research (ITRR) research shows that visitors who use VIC staff as a source of information during their trip spend almost 55% more than that of all visitors and their length of stay is almost 31% longer. Source: ITRR	number of visitors and the number of requests for the Official Visitors Guide.	hope is to magnify its presence for visitors traveling between BZN and YNP. The lack of cell service throughout Gallatin Canyon and on the road south to West Yellowstone results in many visitors stopping to utilize the VIC to ask directions, use their phone and the public restroom facilities.	\$58,000.00		
Marketing Support	TAC/Governor's Conference meetings	Attendance at the Montana Governor's Conference on Tourism and Outdoor Recreation. The destination city changes from year to year, however, expenses include registration, travel, meals and lodging.	According to MOTBD rules and regulations, VBS is required to send at least one individual to the quarterly TAC meetings as well as to the Annual Governor's Conference.	VBS will measure success by sending one staff member to quarterly TAC meetings and the Annual Governor's Conference per rules and regulations of the MOTBD.	It is requirement for being the fiscal sponsor of Montana Lodging Facility Use Tax monies.	\$3,000.00		
Marketing Support	Printed Material	Printing of the Official Big Sky destination map.	In summer 2018, the Big Sky and Greater Yellowstone Visitor Information Center saw almost 5,000 visitors, all of whom were new to the Big Sky area and in need of a map to find their way. By offering printed maps for our guests we are providing a resource not otherwise available. Google maps is not up to date in our area many business locations to not ping on Google, this map helps fill those gaps. Source: http://theconversation.com/why-paper-maps-still-matter-in-the-digital-age-105341	Number of maps printed and distributed at the Big Sky & Greater Yellowstone VIC, as well as by our lodging partners, will measure the success of this method.	Montana is the fourth largest state by area. Orientation for our visitors is essential to provide a remarkable experience. VBS prints maps of the destination and the greater Yellowstone Country Tourism Region to assist travelers in finding their way.	\$5,000.00		
Marketing Support	Research	In order to grow Big Sky tourism, VBS must continually monitor and measure visitor and resident sentiment. In addition, it is critical for the leader of the tourism collective to understand the dynamics of the local market. Research is the tool that facilitates for VBS. A current example of this is VBS' use of DestiMetrics. They are the leading supplier of lodging metrics and market intelligence for the North American mountain travel industry, providing "what you ought to know" about destination-wide metrics, lodging performance, benchmarking and resort intelligence. VBS utilizes DestiMetrics' foundational product,	According to Tourism e-school "understanding the market in which you operate is essential in creating a robust tourism marketing strategy". "Destinations can leverage research to make sound decisions regarding product development and marketing, to remain competitive in our dynamic tourism industry." Research is the tool to be sure that changes you want to make are what the visitor would like when coming to your destination.		Scientific research is a critical tool for successfully navigating our complex world. Without it, we would be forced to rely solely on	\$51,000.00		

		<p>Reservation Activity Outlook, tracks past and present reservation activity, and sets the stage for measuring performance in the destination. These detailed reports gauge occupancy, Average Daily Rate (ADR) and Revenue Per Available Room (RevPAR) at the destination-level. Moving forward, additional research firms and methods will be employed to assist VBS in this area.</p> <p>Additional summer visitor experience surveys will take place in late summer following in market consumer intercept surveys by Destination Analysts.</p>	<p>*Source: https://tourismeschool.com/tourism-research-australia-operators-destinations/</p>		<p>intuition, other people's authority, and blind luck.</p>			
Publicity	Fam Trips	<p>From the perspective of a Destination Marketing Organization (DMO), a familiarization (FAM) tour is an opportunity to host meeting planners, event coordinators, tour operators, or travel media and bloggers in Big Sky to create awareness and provide a positive experience. In other words, to familiarize planners, coordinators, operators and/or media – with our community.</p>	<p>In FY19, VBS partned with the Montana Office of Tourism on three different familiarization trips to bring in different international tour operators, as well as international media. This allowed VBS to expand its international presence and partner with many local Big Sky businesses to broaden the experiences of the attendees. By hosting FAM's VBS is able to frame the experience of the traveler and run the trip in conjunction with its niche marketing campaigns.</p>	<p>Success will be measured by increased articles appearing in the press, social media posts on influencer channels and engagements with those posts and leads generated for group business.</p>	<p>The ability to familiarize media and influencers with outdoor recreation opportunities, unique experiences, lodging and dining options in Big Sky will help VBS to garner earned media.</p>	\$10,000.00		
Publicity	Press Promotions/Media Outreach	<p>VBS will use funds to develop a media kit including press releases and stock photography.</p>	<p>Developing a media kit for VBS will allow VBS to create a tool to send to all media inquiries and international travel/tour operators who typically ask for the same pieces of information, photos, etc. This will save time for staff members and allow VBS to frame its brand exactly how it would like to be seen.</p> <p>Source: https://www.investopedia.com/terms/m/media-kit.asp</p>	<p>Success will be measured by developing the said media kit.</p>	<p>Marketing programs are proven successful by integrating messages across multiple channels of content delivery, and effective public relations efforts will multiply the effect of dollars invested in consumer advertising.</p>	\$1,000.00		
						\$395,998.00		

Markething Method Evaluation Attachments

- Attachment 1
- Attachment 2
- Attachment 3
- Attachment 4

- Attachment 5**
- Attachment 6**
- Attachment 7**
- Attachment 8**
- Attachment 9**
- Attachment 10**

Marketing Method Budget

Marketing Segment	Marketing Method	Bed tax funded budget	Non bed tax funded budget (optional)
Consumer	Print Advertising	\$40,990.00	\$43,500.00
Consumer	Online/Digital Advertising	\$151,730.00	\$335,000.00
Consumer	Website/Internet Development/Updates	\$11,620.00	\$5,000.00
Consumer	Photo/Video Library	\$0.00	\$75,000.00
Consumer	Billboards/Out-of-Home	\$1,500.37	\$5,000.00
Consumer	Social Media	\$8,288.00	\$6,000.00
Consumer	Joint Ventures	\$10,200.00	\$25,000.00
Consumer	Cooperative Marketing	\$0.00	\$28,890.00
Consumer	Electronic Adv - Newsletter, E-blast	\$2,800.00	\$0.00
Consumer	Digital Asset Management/Aquisition	\$12,600.00	\$0.00
Consumer	Opportunity Marketing	\$10,000.00	\$0.00
		\$249,728.37	\$523,390.00
Group Marketing	Multi-Media Marketing	\$3,000.00	\$0.00
Group Marketing	Travel/Trade Shows	\$10,500.00	\$10,000.00
		\$13,500.00	\$10,000.00
Marketing Support	Printed Material	\$5,000.00	\$0.00
Marketing Support	DMO Program Participation	\$1,500.00	\$0.00
Marketing Support	Marketing/Publicity Personnel	\$59,500.00	\$80,372.00
Marketing Support	Administration	\$59,200.00	\$104,961.00
Marketing Support	VIC Funding/Staffing/Signage	\$58,000.00	\$44,342.00
Marketing Support	TAC/Governor's Conference meetings	\$3,000.00	\$0.00
Marketing Support	Research	\$52,000.00	\$40,000.00
		\$238,200.00	\$269,675.00
Publicity	Fam Trips	\$10,000.00	\$5,000.00
Publicity	Press Promotions/Media Outreach	\$1,000.00	\$0.00
		\$11,000.00	\$5,000.00
		\$512,428.37	\$808,065.00

Miscellaneous Attachments

Description	File Name	File Size
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Reg/CVB Required Documents

Reg/CVB Required Documents

Description	File Name	File Size
Required documents for FY20 marketing application	FY 20 required documents.pdf	873 KB
Required Pie Chart	VBS-CVB FY 20 budget pie chart.xlsm	153 KB

