



Grant Details

118486 - FY23 DMO Plan

122505 - FY23 Bozeman DMO Plan

DOC Office of Tourism

Grant Title: FY23 Bozeman DMO Plan

Grant Number: 23-51-044

Grant Status: Underway

Comments:

Applicant Organization: Bozeman Area Chamber of Commerce

Grantee Contact: Daryl Schliem

Award Year: FY23

Program Area: DOC Office of Tourism

Amounts:

Contract Dates:	Contract Sent	Contract Received	Contract Executed
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Project Dates:	06/15/2022	07/01/2022	06/30/2023
	Proposal Date	Project Start	Project End

Grant Administrator: Barb Sanem

Contract Number: 23-51-044

Award Year: FY23

Contract Dates

Contract Sent Contract Received Contract Executed Contract Legal

Project Dates 07/01/2022

06/30/2023

Project Start Project End

Comments

Amendment Comments

DMO Plan Narrative

1. Describe Your Destination

Describe your destination (who you are, who you wish to attract and why they would come) addressing your strengths, opportunities, and potential challenges.

1. BOZEMAN AS A DESTINATION

Bozeman, Montana, is known for its outdoor recreation. Its proximity between two entrances to Yellowstone National Park, two major ski areas, Bridger Bowl and Big Sky Resort, plus six mountain ranges and four significant rivers, makes it a mountaineering dream.

Bozeman continues to grow in both population and visitation. From 2017 to 2019, bed tax collections grew 7-10%, dropping by 24% during 2020, then bouncing back to more than double, with bed tax collections reaching 103% of 2020 numbers. As visitors have experienced the beauty of Bozeman, more and more people continue to make it their home. In 2022, Bozeman ranked #1 for the fifth year in a row for having the strongest local micropolitan economy in the nation. This "economic strength" is evaluated based on a long-term tendency for an area to consistently grow in size and quality. (Polycorn Corporation, 2022 Economic Strength Ratings.)

The technology sector, Montana State University, and the private sector are all growing. According to the City of Bozeman, from January 1-March 22, 2022, 104 business licenses have been processed, averaging 1.2 per day.

Bozeman Yellowstone International Airport now has twenty-two non-stop flights to major cities across the country. In 2021, 40% of the deboardings across Montana were in Bozeman. (ITRR, 2021 Interactive Data, Airport Deboardings.) The addition of Southwest Airlines in 2021 has made Bozeman a regional destination for outbound flights bringing in people from neighboring cities and states to fly out of Bozeman.

Our hotel inventory grew by 247 rooms last year. There are 357 rooms under construction, and 436 additional rooms proposed or in the planning stages for a total of 1,040 additional rooms including those that opened this year.

These numbers breakdown as follows:

Recently Opened

Residence Inn by Marriot, Downtown Bozeman, 104 rooms

AC Marriot Hotel, 143 rooms

Under Construction

Hyatt Place Hotel, 120 rooms

Courtyard Hotel by Marriott, 117 rooms

Proposed / Planning Stages

Embassy Suites, 143 rooms

Hampton Inn and Suites, 143 rooms

Home2Suites by Hilton, 103 rooms

Lost Hotels

Western Heritage Inn, 38 rooms, sold for workforce housing

Holiday Inn, now 3 Rivers Hotel will be torn down this year and two towers built to replace same number of rooms, 177 rooms currently, new towers will be 224 rooms.

Belgrade District

Under Construction

EVEN Hotel IHG, 120 Rooms

Tourism continues to be a significant economic driver in our area, with huge impacts on our local businesses. However, this growth brings both opportunities and challenges. Our housing market is highly competitive, making workforce housing unaffordable and contributing to a shortage of workers. This leads to shortened operating hours and a shortfall of services to support the increased visitation.

It has also led to a decline in resident sentiment toward tourism. In 2021, ITRR reported that Montana resident sentiment toward tourism decreased for the first time, and the Bozeman area is no different.

Visitor Characteristics:

The 2021 ITRR Quarterly Nonresident Visitation Study outlines the visitor characteristics of Gallatin County:

- 17% first-time visitors, 70% repeat visitors, and 82% plan to return within two years.
- 69% of the people said their primary reason for the trip was vacation, 32% were visiting friends or family.
- If on vacation, they were attracted to Montana because of Yellowstone National Park, open space/uncrowded areas, mountains and forest, Glacier National Park, skiing and snowboarding, visiting family and friends.
- Top activities include day hiking, scenic driving, nature photography, wildlife watching, visiting local breweries, recreational shopping, and car and RV camping.
- Top states of residency: WA, UT, CA, MN, VA, OR, WI, PA, ID, ND, GA, FL
- Average age 56, median age 58
- 60% have a household income over \$100,000, with 13% of those making \$200K or greater.

Expenditures:

In 2019, nonresident expenditures for Gallatin County totaled \$948,971,000. (ITRR 2019 Nonresident Travel Survey) Of this, the largest percentage was spent on restaurants and bars, followed by outfitters and guides, gas, hotels, licenses and fees, auto rental, and retail.

BOZEMAN'S STRENGTHS

- Proximity to Yellowstone National Park. Yellowstone continues to set visitation records, with 4.9 million people visiting in 2021.
- World-class skiing at Bridger Bowl and Big Sky Resort.
- Ease of access: 22 non-stop flights, eight airline carriers, and I-90 access.
- A vast amount of outdoor recreation. Destination Analysts DMO Website Importance Study, January 2020, found that 66.7% of Bozeman CVB website visitors searched for Outdoor Recreational Activities.
- A vibrant college town with a strong economy.
- High-quality museums: Museum of the Rockies, Gallatin History Museum, American Computer, and Robotics Museum.
- Several State Parks and Historic Sites are within driving distance: Missouri Headwaters State Park, Madison Buffalo Jump, Virginia and Nevada Cities, Lewis and Clark Caverns.
- Growing Nordic Skiing opportunities: Crosscut Mountain Sports Center and Bridger Ski Foundation provide multiple groomed trails.
- Montana State University
- Community partnerships between the Bozeman CVB, Yellowstone Country, Visit Big Sky, Big Sky Resort, Yellowstone Club, Montana State University, Gallatin County TBID, and the Bozeman Area Chamber of Commerce are working to increase both tourism and business development.

OPPORTUNITIES

- Spillover from Yellowstone brings people to the Bozeman area.

- Jackson Hole airport is closing for renovations May 26-July 7, 2022. This will increase flights in and out of Bozeman, but they are also bringing their rental car fleet to the Bozeman airport to increase capacity.
- Bozeman Yellowstone International is becoming a regional airport. Note: Private flight aviation and FBO passengers are up 16%, however, this equates to about 14,000 passengers, or 1% of our total passengers, many of which are homeowners at the Yellowstone Club or Spanish Peaks. At this time, the airport feels pursuing partnerships with private jet operators for corporate or group booking opportunities would not be worth the return on investment.
- Residual travel potential from friends and family visiting the growing population. 32% of visitors came to visit friends or family in 2021. (ITRR Nonresident Visitors Study, 2021)
- Pent up demand for international travel.
- Advancing Hospitality and Culinary Programs at Montana State University and Gallatin College.
- Possible hotel training center through MSU in the future.
- Increased visitation from regional and drive markets.
- Opportunity to increase winter visitation. During the 2020-2021 ski season, skier visits to Bridger Bowl and Big Sky Resort totaled 227,948. (ITRR Nonresident Visitors Study, 2021)
- Repeat visitors. In 2021, 70% of visitors were repeat, and 82% of visitors planned to return within two years. (ITRR Nonresident Visitors Study, 2021)
- Destination meetings. Bozeman is a sought-after meeting location, and increased air service opens up new markets.
- Travel trends show an increase in interest to travel to less crowded places with a lot of outdoor recreation. (Adara, Traveler Trends Tracker, 2021.)
- Impact of Southwest Airlines. The airline anticipates that beginning the second year of service, Bozeman will see an impact of 500 hotel rooms per day.
- Economic development partnerships for tourism events.
- Two new event/music venues have opened, the Elm, and the Armory, bringing weekly entertainment and drawing local and regional visitors year-round.

POTENTIAL CHALLENGES

- The cost of hotels, gas, and rental cars has increased, making it difficult for return visitors and visitation from local and regional drive markets.
- Workforce challenges such as housing, childcare, and transportation, leading to a lack of staff and decreased hours of operation for local businesses.

Workforce housing continues to be a challenge for Gallatin County. We currently have nearly 1600 apartments either under construction or entering the final approval stage, but our current need is nearly 4,500 units and growing.

Local stakeholders meet weekly to address this need, working on both solutions and financing options. Currently, the School Districts, Gallatin County, and the City of Bozeman are being paired with private developers to address the need. Local banks are creating a special fund to encourage developers to build more units.

We are also looking at nearby towns such as Belgrade, Four Corners, Three Forks, Manhattan, Townsend and even as far as East Helena for options. A regional Transportation District is being discussed to determine how to address housing and transportation at the same time.

This trend is impacting visitor services by limiting hours of business and causing longer wait times. We are currently working with business owners to manage expectations by providing messaging to please be patient,

and that we are still delivering first class service and quality of food.

- Difficult to attract sports tournaments due to the market rate of hotels; these tournaments are a significant economic boost during shoulder seasons.
- Congestion in Yellowstone National Park during the summer months.
- Growing local sentiment resisting increased visitation and population growth.
- Maintaining infrastructure with increased pressure.
- Significant weather events including poor snow, increased wildfires, or water restrictions.
- Lack of larger meeting spaces. While we continue to work with CVENT to respond to all RFP's that fit our current hotel meeting space, small format retreats in both the corporate and non-profit world are challenging because pent-up travel demand has continued to increase our visitation year-round. Meeting space is at a premium and most hotels are booked to capacity without much strategic focus on marketing Bozeman as a meeting place. To expand this area of business, Bozeman is in dire need of a convention center.

2. Align with Montana Brand

Briefly describe how your destination aligns with the Montana Brand.

2. HOW BOZEMAN ALIGNS WITH MONTANA'S BRAND PILLARS

Spectacular, Unspoiled Nature

Bozeman has long been sought out by mountaineers, surrounded by six mountain ranges, four prominent rivers, three state parks, and two of Yellowstone National Park's entrances.

Breathtaking Experiences by Day, Relaxing Hospitality by Night

Bozeman's proximity to outdoor adventure makes it an ideal destination for those who want to adventure by day but enjoy the amenities of an urban environment at night. Bozeman is full of restaurants, retail, art galleries, and entertainment venues featuring live music, theater, film, and dance. The Montana Brand Exploration Study, 2016, noted that among travelers that are most excited about Montana, 30.8% still strongly prefer an urban experience. This presents an opportunity to capture these travelers.

Vibrant, Charming, Small Towns that Serve as Gateways

With the energy of a college town, a growing tech industry, easy access, and a strong economy, Bozeman enjoys the amenities of an urban area while maintaining the feel of a small town.

3. What is the strategic role of your DMO?

Select all that apply: Destination Marketing, Destination Management, Destination Stewardship, Destination Development).

Destination Marketing, Destination Management, Destination Stewardship

Based on the strategic role you serve, provide the following information.

3a. Define your audience(s) (demographic, geographic, and psycho-graphic).

3. STRATEGIC ROLE OF THE ORGANIZATION

Historically, Bozeman CVB has focused primarily on Destination Marketing, working to increase awareness and visitation. While visitation continues to grow, recent research indicates Bozeman is still relatively unknown to a large segment of the population. Additionally, with travel opening to urban areas and international travel, there will be more competition among western states. Therefore, we feel it is important to continue marketing Bozeman as a leisure destination.

However, with record numbers of visitors and new residents, our organization will also put resources toward Destination Management and Destination Stewardship to educate visitors about safety, responsibility, and the Montana way of life when recreating in our area. Through local partnerships, we are creating content around responsible recreation and acting as the marketing arm for a united message.

As resident sentiment toward tourism begins to decline, we will work to inform and educate residents about the economic impact tourism has on our area.

a. Define your audience:

Destination Marketing

GEOGRAPHIC TARGETS

In FY23, our geographic target markets will be broken into regional and national campaigns.

Regionally:

The state of Montana, along with the following emerging regional markets; Eastern Washington, Idaho, Utah, and the Dakotas.

Nationally:

Direct flight markets, with a strong focus on the following markets, Los Angeles, Boston, Washington DC, Nashville, Dallas, Denver, Seattle, and Minneapolis. *Note, while our research shows New York as a promising market, traditionally we see a lot of research, but not a lot of follow through on travelers' behalf. Therefore, New York is not one of our target markets.

DEMOGRAPHIC AND PSYCHOGRAPHIC TARGETS

Outdoor Adventure Seekers: People showing interest in skiing/snowboarding, national parks, hiking, fly fishing, adventure travel, and camping. These outdoor-oriented travelers are high potential visitors. (Montana Brand Exploration Study, 2016.)

Western Culture Seekers: Western culture has broad appeal. Outfitters and guides accounted for the second-highest expenditure in Gallatin County in 2019, reaching almost \$150,000,000. (ITRR Nonresident Visitor Expenditures by Location, Gallatin County.) In addition, the television show Yellowstone has increased awareness of the area and added to this demographic.

Winter Enthusiasts: With two alpine ski areas, a plethora of Nordic and snowshoe trails, plus vast snowmobiling terrain, Bozeman is an ideal fit for the winter enthusiast, particularly those with a high interest in cold season activities. (Montana Brand Exploration Study, 2016.)

Families: Findings from Destination Analysts Montana Brand Exploration Survey, 2016, identified Family Travelers as a high-value segment indicating that they index high on outdoor psychographics, have high incomes and would expect to spend more and stay longer in the state than other travelers.

Older Couples w/ No Kids: A segment we continue to see emerging is the over 55 married couple. This segment has a more flexible schedule, disposable income, and an appetite for adventure. They still seek the ease of travel and the comforts they've expected in larger markets, but they are drawn to National Parks as bucket list destinations, including Yellowstone.

OTHER TARGET MARKETS

Film: With state incentives working to encourage filmmakers to bring their work to Montana, we welcome the opportunity to collaborate with the Montana Film Office whenever possible.

Conferences and Meetings: As our hotels continue to expand, we are gaining capacity for conferences and meetings. The Kimpton Armory Hotel opened last year with a meeting room of 500 people.

Sports Tournaments and Events: Working in collaboration with the Gallatin Valley Tournament Committee and the Gallatin Valley TBID, we focus on statewide and regional tournaments both inside and outside of the Montana High School Association.

Tour Groups: Bozeman CVB will be participating in IPW in Orlando, sharing a booth with other Montana delegates. This gives us the opportunity to meet with 44 shared appointments, and with international travel opening up, we expect increased interest to our area. We will also be attending IMEX, the largest trade show in North America for the meeting and events industry.

Destination Management and Destination Stewardship

Bozeman Residents and Business Owners: Educating our local population about the positive economic outcomes of visitation.

Visitors to Bozeman: Educate those visiting Bozeman about trail etiquette, safety, and resource preservation across various outdoor activities in the area.

3b. What research supports your DMO strategy?

RESEARCH SUPPORTING STRATEGY

Destination Marketing

In FY21, the Bozeman CVB contracted Destination Analysts to conduct a Bozeman Consumer Sentiment Research Study, presenting the findings in June 2021. The study focused on five of Bozeman's key markets: Denver, CO, Los Angeles, CA, NYC Metro, Minneapolis, MN, and Seattle, WA.

This research was specifically designed to fulfill the following objectives:

- Benchmark awareness, familiarity, appeal, and likelihood to visit Bozeman amongst current and potential audiences.
- Understand the Bozeman destination brand, including associations, perceptions, and most valued attributes.
- Measure future travel intentions to visit Bozeman.
- Explore desired travel experiences—both physical and emotional—in Bozeman and the emotional and functional drivers that generate traveler interest in these experiences.
- Explore the marketing messaging about Bozeman that will most resonate with potential visitors
- Understand deterrents for visiting Bozeman.
- Determine the media most likely to reach both current and potential audiences.
- Identify the highest potential visitors and highest potential economic impact segments and geographic markets for Bozeman.

Key Findings:

Mountains, beautiful scenery, and the outdoors are top associations with Bozeman, but "Nothing" was also a top-cited descriptor which tells us there is a significant opportunity to improve the familiarity, particularly among Los Angeles and New York City residents.

Bozeman ranks most highly for scenic beauty, nature experiences, and outdoor adventure. It also received high marks for lack of crowds, family-friendliness, and a welcoming atmosphere.

Bozeman underperforms in local dining, ease of access, affordability, and iconic/famous attractions. The study found that Bozeman was most likely to be neutral in these areas.

Unique experiences and a "hip western town" could motivate 2/3 of the audience to visit. Outdoor adventure and relaxation were also motivators.

CA and HI were listed as the destinations this audience was most likely to visit. However, less than one percent wrote in Bozeman specifically as a top-of-mind Western U.S. place they would like to visit on their next vacation.

Bozeman ranked highest for outdoor adventure but fell short for urban experiences. Salt Lake City outpaced Bozeman on the urban experience, family-friendly, and most desired place to visit.

Regarding messaging, the study found that scenic beauty (85.4%) and a welcoming atmosphere (81.9%) top the list of attributes. Three in four add affordability, ease of access, restaurants, and nature experiences as important experiences.

Two primary goals topped the list of 13 possible travel desires, relaxation and experiencing beautiful places.

The top questions asked about Bozeman were, 'What is there to do?' and 'Where can I stay overnight?'

Travel planning averaged nine months before the trip. It was conducted through online searches, friends/family via social media, travel review websites, social media services, word of mouth, travel-related shows, travel brochures, lifestyle print magazines, travel books, and films/movies.

Based on potential impact calculations, the New York City DMA and the Los Angeles DMA are the recommended priorities with higher-than-average spending per day on a possible trip, combined with a larger marketable audience size. Denver, Minneapolis, and Seattle follow this.

Of the 25.4% of high potential travelers, NYC Metro has the highest proportion of the audience, followed by Denver and LA.

Traits of these avid and lucrative travelers are more likely to include children, both older and younger, with a broad array of interests, including state parks, scenic drives, Yellowstone, the food scene, outdoor recreation, and historical sites.

54% have visited Bozeman in the past and feel likely to visit again in 3 years.

Only 2 in 4 people feel familiar with Bozeman's attractions and things to do.

91.7% praised the imagery in Bozeman's marketing as effective or very effective, and 73.2% said the video makes them likely to visit. Overall, Bozeman's marketing doubled the average traveler's recall.

One of the significant deterrents for return visitors is "What's new in Bozeman?"

Top 10 Hobbies and Passions for the High Interest or Extremely High-Interest Traveler

- Food and Cuisine
- National Parks
- Fitness, health, and wellness
- Musical Concerts
- Hiking
- Theme or amusement parks
- Theatre or plays
- Art Museums
- Wine

2022 Travel Trends, Fortune

Bozeman continues to rise in its popularity. A recent Kayak study showed Colorado and Montana make up 4 of the top 10 trending destinations on Kayak for 2022 and increased their search share of 46% compared to 2019.

"We always see beach towns in Mexico and Florida trend for American tourists, but what's more interesting are the new cities we're seeing pop like Kalispell, Bozeman, and Steamboat Springs," Kayak CEO Steve Hafner tells *Fortune*. "Destinations that offer quick flights, little to no restrictions, and provide a good combination of indoor and outdoor activities appear to be the preference amongst American travelers these days."

However, our 2021 research shows that there is still a high level of unawareness about Bozeman as a leisure destination.

The State of the American Traveler in 2022, Destination Analysts

Americans have a strong motivation to travel, particularly closer to home, which bodes well for in state and regional drive markets.

"Despite concerns about inflation and gas prices potentially impacting trip volume, Americans' strong excitement for travel sustains. While today's traveler is still trending towards shorter, closer to home and more carefully planned trips than before the pandemic, they are more motivated to travel than ever."

Destination Management and Destination Stewardship

Resident Attitudes Toward Tourism, ITRR, 2021

For the first time, resident sentiment toward tourism is decreasing. The latest research found more people feel the negative impacts of tourism outweigh the overall benefits. Fewer people feel if tourism increases in Montana, the overall quality of life for residents will improve. And, more people agree that the state is becoming overcrowded in recent years because of more tourists.

2022 Destination Marketing Predictions, Madden Media

Two key trends supporting our move toward Destination Management and Destination Stewardship include:

- Increasing call from residents and visitors alike for more sustainable, regenerative tourism.
- A need for destination intelligence.

OTHER RESEARCH USED TO FORMULATE STRATEGY

- Bozeman Consumer Sentiment Research Study, Destination Analysts, 2021
- ITRR, Non-resident Travel Study, 2021
- Destination Analysts:
 - "Montana Brand and Exploration Research," October 2016
 - "Profile Study of the Winter Enthusiast," February 2018
- Arrivalist Data
 - Origin markets
 - Points of interest
 - Visitor demographics
 - Drive market arrivals
- Adara, Traveler Trends Tracker, 2021
- Bozeman Yellowstone International Airport Data
- Website Traffic Trends
- Organic Traffic
- Bozeman CVB Email List
- Social Media Metrics

3c. What are your emerging markets?

EMERGING MARKETS

Emerging Geographic Markets:

Canada and the Asian Pacific Rim

Emerging Psychographic Markets:

Entertainment Seekers: The Elm, a new music venue, opened in 2021, bringing in a wide array of musical talent several times per week. In addition, The Rialto, Brick Breeden Fieldhouse, Ellen Theatre, Emerson Cultural Center, and the Willson Auditorium all bring in top-notch national, regional, and local music, theater, dance, and comedy.

International Travelers: Canada and the Asian Pacific Rim have traditionally been good markets for Bozeman. However, Yellowstone has set records without the Asian market, and with pent-up demand for the past two years, we expect these markets to return.

4. Define and describe your overall goals.

A goal is an idea of the future or desired result that a person or group of people envisions, plans and commits to achieve.

4. OVERALL GOALS

Bozeman CVB FY23 Goals

The Bozeman CVB has identified three goals to pursue in our FY23 DMO marketing efforts.

- Increase awareness of Bozeman as a leisure destination in direct flight and major drive markets. Messaging includes scenic beauty and ease of access, plus dining, entertainment, and things to do.

- Enhance the organization's stewardship role through partnerships, outreach, and education—partner with local stakeholders to educate visitors about responsible recreation. Educate residents about the economic impact of tourism on our area.
- Conduct research to better understand our current visitors, their interests, and the changing landscape of our area.

4a. Describe proposed tactics and projects as related to overall goals and controlled by the organization in its financial statements.

TACTICS AND PROJECTS

Destination Marketing

Goal

- Increase awareness of Bozeman as a leisure destination in direct flight and major drive markets. Messaging to include scenic beauty and ease of access and dining, entertainment, and things to do.

Objectives

Support our ten-year investment in direct flights by advertising in specific markets. Maintain flexibility in advertising contracts to support flights that need more volume throughout the fiscal year. Nurture growing drive markets, including Eastern Washington, Idaho, Utah, and the Dakotas.

Tactics and Projects

- Continue to use paid and earned media, including organic social media, to reach new customers in target markets.
- Continue our use of blog content to provide new and relevant information to visitors and increase our organic SEO.
- Continue utilizing newsletters to our existing database and continue to grow audience subscriptions.
- Participate in Joint Ventures with Brand MT, Yellowstone Country, and other local tourism stakeholders to maximize our marketing dollars.
- Expand our photo and video library to maintain fresh imagery in all of our marketing.

Methods

- Joint Ventures
- Opportunity Marketing
- Agency Services
- Paid Media
- Earned Media/Tourism Sales
- Website Development
- Travel/Trade Shows

Metrics

- Increase bed tax dollars by 20% over FY21
- Increase airport deplanements by 10% over 2021, to 1,100,000 people
- Increase website visits by 25% over FY22 to 963,750 sessions
- Increase newsletter signups by 20% over FY22 to 5,520 new contacts
- Increase social media traffic by 20% over FY22 to 241,900 sessions
- Increase the calibrated travel index of people visiting from less than 250 miles over calendar year 2022 by 20% (measured by Arrivalist)

Destination Stewardship

Goal

- Enhance the organization's stewardship role through partnerships, outreach, and education—partner with local stakeholders to educate visitors about responsible recreation. Educate residents about the economic impact of tourism on our area.

Objectives

- Continue cooperative partnership in Outside Kind, an alliance streamlining the messaging for trail etiquette across all user groups. This endeavor seeks to share best practices, principles, and tips for enjoying the outdoors together and provides consistent and clear guidelines around outdoor activities and positive local ethics.
- Create a cohesive PR message with community stakeholders for traveler education.
- Create a quarterly dashboard for business owners and residents illustrating estimated economic impact through airline travel, hotel stays, and average traveler spending.

Methods

- Cooperative Marketing
- Agency Services
- Paid Media
- Earned Media/Tourism Sales
- Website Development
- Education/Outreach

Metrics

- Partner with 6 community stakeholders on the campaign
- Create a series of blog posts and ad campaigns to implement throughout FY23.
- Create quarterly dashboard and push out two fiscal quarters of information in FY23
- Reach 5 million campaign impressions

Destination Management

Goals

- Conduct research to better understand our current visitors, their interests, and the changing landscape of our area.
- Include local resident sentiment in the study.

Objectives

- Understand the post-pandemic traveler persona.
- Evaluate in-state sentiment toward tourism.
- Understand traveler disbursement; where are visitors going, and what are they doing when they get here?
- Understand how many visitors are staying in hotels vs. vacation rental homes.

Methods

Research

- Engage Destination Analysts to conduct the study.
- Website survey
- Geographic data from NEAR
- Arrivalist: pre-travel surveys, post-travel surveys, in-state traveler surveys.

Metrics

Complete research and begin formulating plans for FY24.

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Objectives/Metrics/Evaluation

Objectives	Measurable Metrics for Success	Report the Metric Achieved	Evaluation of Measurable Metrics for Success
<p>Destination Marketing Objectives</p> <ul style="list-style-type: none"> Support our ten-year investment in direct flights by advertising in specific markets. Maintain flexibility in advertising contracts to support flights that need more volume throughout the fiscal year. Nurture growing drive markets, including Eastern Washington, Idaho, Utah, and the Dakotas. 	<p>Metrics</p> <ul style="list-style-type: none"> Increase bed tax dollars by 20% over FY21 Increase airport deplanements by 10% over 2021, to 1,100,000 people Increase website visits by 25% over FY22 to 963,750 sessions Increase newsletter signups by 20% over FY22 to 5,520 new contacts Increase social media traffic by 20% over FY22 to 241,900 sessions Increase the calibrated travel index of people visiting from less than 250 miles over calendar year 2022 by 20% (measured by Arrivallist) 	<p>Bed tax increased 5.9% over FY22, and 68% over FY21.</p> <p>Airport deplanements reached 1,128,743.</p> <p>Website visits were 8.21% over previous year, with 754,148 sessions.</p> <p>Newsletter signups reached 5,884 new contacts.</p> <p>Social media traffic increased to 246,946 sessions.</p> <p>*Data not available.</p>	<p>Although we did not achieve the 20% growth, in FY23, flooding in Yellowstone closed the Park and hindered early summer visitation.</p> <p>Airport deplanements continue to grow without any sign of slowing. For the year ending October 2023, Bozeman Yellowstone International Airport handled 2,443,948 passengers.</p> <p>Our website visits peaked in 2022 and while we have seen some slowing, in FY23 our media strategy included some strategies that drove awareness, but did not necessarily drive direct clicks to the website, (streaming TV, out of home, etc.).</p> <p>Newsletter signups were the most successful to date, exceeding our goal.</p> <p>Social media traffic exceeded expectations and continue to be a strong driver of traffic.</p>

			<p>*Arrivalist switched their data samples at the end of 2022. The new visitation data is different than the original, so we were unable to measure the travel index of people visiting less than 250 miles.</p>
<p>Destination Stewardship</p> <p>Objectives</p> <ul style="list-style-type: none"> Continue cooperative partnership in Outside Kind, an alliance streamlining the messaging for trail etiquette across all user groups. This endeavor seeks to share best practices, principles, and tips for enjoying the outdoors together and provides consistent and clear guidelines around outdoor activities and positive local ethics. Create a cohesive PR message with community stakeholders for traveler education. Create a quarterly dashboard for business owners and residents illustrating estimated economic impact through airline travel, hotel stays, and average traveler spending. 	<p>Metrics</p> <ul style="list-style-type: none"> Partner with 6 community stakeholders on the campaign Create a series of blog posts and ad campaigns to implement throughout FY23. Create quarterly dashboard and push out two fiscal quarters of information in FY23 Reach 5 million campaign impressions 	<p>We partnered with 6 community stakeholders on a Be Good to Bozeman campaign.</p> <p>Created blog posts, two videos, TV commercials that ran on two stations, eight social reels, visitor packets, posters, table tents and a banner over Main Street during the fall and summer.</p> <p>Our quarterly dashboard was pushed to FY24 because we did not have access to STR, AirDNA or traveler spend data. We did receive the information at the end of FY23 and will be using it to create the dashboard.</p> <p>Campaign impressions estimated at 1.5 million.</p>	<p>Stakeholders included the Downtown Bozeman Association, Bridger Ski Foundation, Outside Kind, Gallatin Valley Land Trust, Friends of Hyalite, and the Gallatin Watershed Council.</p> <p>The Be Good to Bozeman campaign was highly successful, producing a lot of content, media attention, and positive feedback.</p> <p>Dashboard evaluation to come FY24.</p> <p>Since this was the first year of this type of campaign, it was difficult to project the number of impressions we would garner. In addition, a large part of the campaign included in-person materials, which impressions can't be measured.</p>

<p>Destination Management Objectives</p> <ul style="list-style-type: none"> • Understand the post-pandemic traveler persona. • Evaluate in-state sentiment toward tourism. • Understand traveler disbursement; where are visitors going, and what are they doing when they get here? • Understand how many visitors are staying in hotels vs. vacation rental homes. 	<p>Metrics</p> <p>Complete research and begin formulating plans for FY24.</p>	<p>Our objective for destination management in FY23 was to understand the post-pandemic traveler, as well as traveler disbursement, where they are going and what activities they are doing.</p> <p>We did complete a Resident Sentiment Study and a 2022 Visitor Profile Study. These two studies have helped shape our Destination Stewardship efforts. In FY24, we are looking at Montana resident's attitudes toward Bozeman in an effort to reignite visitation to Bozeman from other parts of the state.</p>	<p>These two studies have helped shape our Destination Stewardship efforts. In FY24, we are looking at Montana resident's attitudes toward Bozeman in an effort to reignite visitation to Bozeman from other parts of the state.</p>
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DMO Budget

Allowable Methods	Amount Budgeted	% of Budget Allocated	Amount Expended	% of Budget Expended
Administration	\$126,397.00	20.0	\$119,595.00	94.6
Cooperative Marketing	\$25,500.00	4.0	\$18,425.58	72.3
Joint Venture	\$220,000.00	32.0	\$183,436.09	83.4
Opportunity Marketing	\$30,000.00	2.0	\$48,762.48	162.5
Paid Media	\$171,353.00	25.0	\$227,110.62	132.5
Marketing Personnel	\$6,500.00	1.0	\$0.00	0
Research	\$50,000.00	5.0	\$30,000.00	60.0
Travel/Trade Shows	\$15,000.00	2.0	\$0.00	0
Visitor Services	\$61,500.00	8.0	\$40,892.97	66.5
Website Development (Online, Website, Mobile)	\$1,000.00	1.0	\$270.00	27.0
	\$707,250.00	100.00	\$668,492.74	

Narrative Evaluation

Destination Marketing

Our FY23 marketing focus was to support our ten-year investment in direct flight markets, as well as drive markets including Eastern Washington, Idaho, Utah, and the Dakotas.

Although we did not achieve the 20% growth, in FY23, flooding in Yellowstone closed the Park and hindered early summer visitation. Bed tax dollars are still up 5.9% over FY22, and 68% over FY21.

Airport deplanements continue to grow without any sign of slowing. For the year ending October 2023, Bozeman Yellowstone International Airport handled 2,443,948 passengers.

Our website visits peaked in 2022 and while we have seen some slowing, in FY23 our media plan included some strategies that drove awareness but did not necessarily drive direct clicks to the website, (streaming TV, out of home, etc.). Total website sessions came to 754,158, an increase of 8.2%.

Newsletter signups were the most successful to date, exceeding our goal, and collecting 5,884 new contacts.

Social media traffic exceeded expectations and continue to be a strong driver of traffic. Total website sessions from social media equaled 246,946.

*Arrivalist switched their data samples at the end of 2022. The new visitation data is different than the original, so we were unable to measure the travel index of people visiting less than 250 miles.

Destination Stewardship

This year, we partnered with six organizations in a Be Good to Bozeman campaign intended to highlight best practices, principles, and tips for enjoying the outdoors. The campaign included consistent and clear guidelines around outdoor activities and promoted positive local ethics.

Stakeholders included the Downtown Bozeman Association, Bridger Ski Foundation, Outside Kind, Gallatin Valley Land Trust, Friends of Hyalite, and the Gallatin Watershed Council.

The Be Good to Bozeman campaign was highly successful, producing a lot of content, media attention, and positive feedback.

Impressions are estimated at 1.5 million, however, since this was the first year of this type of campaign, it was difficult to project the number of impressions we would garner. In addition, a large part of the campaign included in-person materials, which impressions can't be measured.

Dashboard evaluation to come FY24.

Destination Management

Our objective for destination management in FY23 was to understand the post-pandemic traveler, as well as traveler disbursement, where they are going and what activities they are doing.

We did complete a Resident Sentiment Study and a 2022 Visitor Profile Study.

These two studies have helped shape our Destination Stewardship efforts. In FY24, we are looking at Montana resident's attitudes toward Bozeman in an effort to reignite visitation to Bozeman from other parts of the state.

Reg/CVB Required Documents

Description	File Name	File Size
Bozeman CVB, Required Documents	Bozeman CVB_Required Documents.pdf	393 KB

