

MONTANA'S HIGH PLAINS

Overview of 2009 Campaign Research

Presented to the
Tourism Advisory Council
Bozeman, Montana
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BACKGROUND

- + In June 2009, the Montana Office of Tourism (MTOT) launched first-ever campaign to exclusively promote eastern Montana, under the newly formed name “Montana’s High Plains” (MTHP)
- + Campaign ran for approx. 3 months (June-August 2009)
 - \$300,000 budget (media and production)
 - Targeted Missoula and Bozeman, MT; Bismarck, ND
 - Media included TV, newspaper, magazine, NPR underwriting, out-of-home, campaign mini-site, and retail restaurant partnership with MacKenzie River Pizza Co.
 - Message focused on the spectacular, unspoiled aspects of MTHP via three icon areas: Bighorn Canyon National Recreation Area, C.M. Russell National Wildlife Refuge, and the Upper Missouri Breaks National Monument

BACKGROUND

- + MTOT wanted to determine the effectiveness of the campaign, as well as set a benchmark for awareness and perceptions of MTHP
- + Worked with the Institute for Tourism & Recreation Research (ITRR) at the University of Montana
 - Cost of Study: \$15,900
 - Contracted study through MercuryCSC and paid by MTOT
 - NOTE: by the time research need was identified, ITRR's FY10 research funds had already been approved by TAC and fully allocated

OBJECTIVES OF STUDY

Among the campaign's target audience:

- + OBJ 1: Evaluate the awareness of Montana's High Plains
- + OBJ 2: Assess perceptions of MTHP as a place to visit
- + OBJ 3: Measure intent to travel to MTHP

APPROACH & METHODOLOGY

- + Mail-back survey: 1000 surveys were mailed to a random sample of residents of counties surrounding target cities
 - ND: Burleigh and Morton counties
 - MT: Flathead, Gallatin, Lake, Missoula and Park counties
- + The number of surveys sent to each county was proportionate to the population of each county
 - Ensured that no county was over-represented in the data
- + 319 completed surveys were returned for an overall response rate of 34 percent

METHODOLOGY

- + 319 respondents screened to meet geotraveler tendencies respondents split into two categories, based on their agreement with a set of “geotraveler tendency” statements (where 1=disagree and 5=agree)
 - Excluded from further analysis: score <3 (n=19)
 - Potential Geotrailers: score ≥ 3 but <4 (33%)
 - Geotrailers: score of 4+ (67%)

FINDINGS, OBJ1: Awareness

- + 47% of geotravelers/potential geotravelers had heard the term, “Montana’s High Plains”
- + Brand recalled most via:
 - Word of Mouth (38%)
 - Magazine (29%)
 - TV (27%)
 - Radio (21%)
 - Newspaper (16%)
- + Between 18%-22% said learning about the High Plains changed their impression in a positive way
 - Impression for majority of aware respondents (67%-74%) remained unchanged; based on surveyed perceptions, was already a positive

Table 4 - Familiarity with “High Plains,” where the term was heard, and resulting change in image

	Geotravelers (n=202)	Potential Geotravelers (n=98)
Prior to this survey, have you heard the term, “Montana’s High Plains”?		
Yes	50%	43%
No	50%	57%
<i>The following two questions were answered only by those who responded “yes” to the previous question.</i>		
Sample size for the following 2 questions	n=100	n=41
If yes, where did you hear the term Montana’s High Plains? (check all that apply)		
Word of Mouth	38%	34%
Magazine	29%	24%
TV	27%	27%
Unsure	27%	29%
Radio	21%	22%
Newspaper	16%	20%
At MacKenzie River Pizza Co.	9%	2%
Website	4%	2%
How did your impression change once you learned about Montana’s High Plains?		
It didn’t change	74%	67%
It changed positively	22%	18%
Both positively and negatively	3%	13%
It changed negatively	1%	3%

FINDINGS, OBJ2: Perceptions

- + Geotravelers agree on MTHP's top offerings:
 - Vast, open spaces (4.76/5.00)
 - Ranching/farming heritage (4.74)
 - Unique geologic features (4.57)
 - Native culture (4.56)
 - Intriguing natural history (4.54)
 - Friendly people (4.53)
 - Abundant wildlife (4.50)
- + Geotravelers disagree that MTHP has unpleasant terrain or nothing of interest
- + Open-ended perceptions largely positive

Table 9 – Potential geotravelers perceptions of what the High Plains have to offer

Potential Geotravelers	In your opinion, Montana’s High Plains has:					
	Mean Score	Disagree	Somewhat disagree	No perception	Somewhat agree	Agree
Vast open spaces	4.83	0%	0%	5%	8%	87%
Ranching/farming heritage	4.69	0%	0%	8%	14%	78%
Friendly people	4.58	0%	4%	9%	13%	74%
Abundant wildlife	4.55	0%	1%	8%	25%	66%
Unique geologic features	4.44	1%	2%	12%	21%	64%
Intriguing natural history	4.32	1%	1%	21%	17%	60%
Great hunting opportunities	4.31	1%	4%	21%	11%	63%
Quaint communities	4.29	0%	11%	13%	13%	63%
Native culture	4.28	1%	4%	17%	24%	55%
Unique dinosaur history sites	4.25	1%	1%	25%	17%	56%
A relaxing atmosphere	4.23	0%	7%	16%	23%	54%
Great fishing opportunities	4.21	1%	2%	25%	18%	54%
Opportunities to learn about Regional history/culture	4.20	1%	4%	24%	16%	55%
Opportunity for adventure	4.19	1%	5%	20%	23%	51%
Attractive scenery	4.16	1%	13%	9%	21%	55%
Interesting attractions	4.15	2%	8%	11%	29%	50%
Awe inspiring scenery	4.15	1%	11%	10%	28%	50%
Places I would like to explore	4.00	2%	7%	23%	23%	45%
Great camping opportunities	3.96	2%	8%	23%	23%	43%
A sense of excitement	3.91	4%	9%	19%	29%	39%
Great hiking opportunities	3.90	6%	6%	23%	21%	44%
Accessibility to water Recreation	3.88	2%	9%	24%	28%	37%
Excellent facilities for Travelers	3.72	4%	7%	30%	33%	27%
Unpleasant terrain	3.13	19%	15%	19%	26%	21%
Nothing of interest	2.02	49%	21%	16%	9%	6%

Table 8 – Geotravelers perceptions of what the High Plains have to offer

Geotravelers	In your opinion, Montana’s High Plains has:					
	Mean Score	Disagree	Somewhat disagree	No perception	Somewhat agree	Agree
Vast open spaces	4.76	0%	0%	10%	4%	86%
Ranching/farming heritage	4.74	0%	0%	10%	7%	84%
Unique geologic features	4.57	0%	2%	9%	21%	69%
Native culture	4.56	0%	1%	11%	21%	68%
Intriguing natural history	4.54	0%	1%	10%	22%	67%
Friendly people	4.53	1%	2%	12%	14%	71%
Abundant wildlife	4.50	1%	2%	10%	21%	66%
Opportunities to learn about regional history/culture	4.46	0%	3%	10%	25%	62%
Unique dinosaur history sites	4.42	0%	2%	17%	18%	63%
A relaxing atmosphere	4.36	0%	7%	13%	17%	63%
Opportunity for adventure	4.32	2%	6%	11%	24%	59%
Quaint communities	4.31	2%	3%	12%	30%	54%
Great fishing opportunities	4.27	1%	1%	25%	17%	56%
Places I would like to explore	4.26	2%	8%	9%	25%	56%
Great hunting opportunities	4.24	1%	1%	29%	13%	57%
Awe inspiring scenery	4.17	2%	12%	8%	26%	53%
Interesting attractions	4.15	2%	10%	8%	33%	48%
Attractive scenery	4.12	2%	14%	9%	24%	52%
Great camping opportunities	4.10	2%	7%	17%	28%	47%
Accessibility to water recreation	4.08	0%	9%	16%	31%	43%
Great hiking opportunities	3.97	3%	11%	17%	25%	44%
A sense of excitement	3.87	4%	16%	11%	29%	41%
Excellent facilities for travelers	3.56	4%	15%	25%	33%	23%
Unpleasant terrain	2.93	21%	23%	15%	23%	18%
Nothing of interest	1.79	55%	25%	10%	7%	3%

FINDINGS, OBJ2: Perceptions, cont'd

“The mean scores of...the perceptions...can help us to interpret the responses provided for the four open-ended questions. While many of the comments could be interpreted as negative if taken out of context, the levels of agreement with what the High Plains has to offer helps us to realize that comments such as “rugged,” “windy” and “desolate” are not necessarily negative. In fact, in light of how people responded to the 20 perception items, it seems that these comments, and others like them, are not intended as negative remarks, but rather, as simple observations or even positive comments. While the landscape and recreational opportunities that the High Plains has to offer may not appeal to everyone, it does seem that many people, particularly those like the geotourists, appreciate what can be found in Montana’s High Plains.”

–Kara Grau, ITRR (excerpt from study)

Table 10 – Summary of open-ended responses

Perception of...			
Geotrailers (n=202)			
Landscape	Terrain Descriptors (i.e. flat, rugged, prairie)	Open Space (i.e. big, open, vast)	Climate/Weather (i.e. dry, windy, hot)
Hospitality	Friendly/Helpful (i.e. friendly, helpful, welcoming)	Facilities Descriptors (i.e. good, small-town, pleasant)	People Descriptors (i.e. honest, western, polite)
Recreation Opportunities	Hunting/fishing (i.e. great hunting, great fishing)	Not so positive remarks (i.e. limited, boring, sparse)	Other types of recreation (i.e. sightseeing, horses, golf)
Feelings if Vacationing	Relaxed/rested (i.e. relaxing, peaceful, quiet)	Happy (i.e. good, welcome, great)	Adventure/Excitement (excited, fun, surprised)
Potential Geotrailers (n=98)			
Landscape	Terrain Descriptors (i.e. flat, rolling hills, rugged)	Climate/Weather (i.e. dry, windy, hot)	Open Space (i.e. open, vast, big sky)
Hospitality	Friendly/Helpful/Welcoming (i.e. friendly, helpful, downhome)	Facilities Descriptors (i.e. good, hospitable, small-town)	Unknown/Misc. (community, campgrounds)
Recreation Opportunities	Hunting/fishing (i.e. excellent hunting, pheasants, good fishing)	Positive remarks (i.e. good, fun, less crowded)	Not so positive remarks (i.e. limited, hot, lacking)
Feelings if Vacationing	Enjoy/Positive remarks (i.e. enjoyable, great, excited)	Relaxed/peaceful (i.e. relaxed, fulfilled, inspired)	Bored/Alone (i.e. alone, isolated, distanced)

FINDINGS, OBJ3: Intent to Travel

- + High potential for future visitation to MTHP
 - 52% of geotrailers indicated that they would at least possibly visit the High Plains within the next year
 - 89% would consider visiting two to three years from now
 - Between 43%-53% are at least somewhat likely to visit Bighorn Canyon NRA, CM Russell NWR, or Upper Missouri River Breaks National Monument within the next 3 years

Table 6 – Vacations in the High Plains

	Geotravellers (n=202)					Potential Geotravellers (n=98)				
How often have you vacationed or recreated in Montana’s High Plains?	Never	Once	2-5 times	6-10 times	More than 10 times	Never	Once	2-5 times	6-10 times	More than 10 times
	39%	13%	28%	7%	12%	39%	13%	25%	14%	9%
Did you vacation/recreate in MT’s High Plains this summer?	No		Yes			No		Yes		
	88%		12%			89%		11%		
Do you plan to vacation/recreate in MT’s High Plains in the next 12 months?	No	Possibly	Probably	Definitely		No	Possibly	Probably	Definitely	
	49%	32%	9%	11%		62%	21%	6%	10%	
Would you consider vacationing/recreating in MT’s High Plains 2 to 3 years from now?	No	Possibly	Probably	Definitely		No	Possibly	Probably	Definitely	
	12%	47%	20%	22%		28%	50%	11%	11%	

Table 7 – Visits to High Plains attractions

		Geotravellers (n=202)			Potential Geotravellers (n=98)		
Have you visited the following in Montana’s High Plains? (please X all that apply)							
	Bighorn Canyon National Recreation Area	CM Russell National Wildlife Refuge	Missouri River Breaks National Monument	Bighorn Canyon National Recreation Area	CM Russell National Wildlife Refuge	Missouri River Breaks National Monument	
	14%	26%	29%	14%	28%	32%	
How likely are you to visit the following High Plains sites within the next 3 years?							
	Bighorn Canyon National Recreation Area	CM Russell National Wildlife Refuge	Missouri River Breaks National Monument	Bighorn Canyon National Recreation Area	CM Russell National Wildlife Refuge	Missouri River Breaks National Monument	
Not at all likely	15%	14%	12%	34%	31%	29%	
Unlikely	20%	17%	14%	15%	14%	15%	
Somewhat unlikely	22%	24%	21%	19%	20%	14%	
Somewhat likely	31%	28%	31%	22%	22%	28%	
Likely	8%	12%	14%	9%	11%	11%	
Very likely	4%	6%	8%	1%	2%	4%	

RECOMMENDATIONS & NEXT STEPS

- + Continue to market “Montana’s High Plains” to build awareness and trip intent
 - Will wrap into 2010 in-state marketing efforts
- + Negative comments (“not too abundant,” “only basic needs to be met,” and “on their own schedule”) offer ideas for improvement to tourism related businesses in MTHP
- + Consider monitoring MTHP marketing efforts by partnering with ITRR for study every 2-3 years

FOR MORE INFO

- + Full report, *High Plains Travel and Recreation Perception Survey Results*, available online at:

<http://www.itrr.umt.edu>

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