



# MONTANA



## *Travel Montana & Mercury Advertising Brand Awareness Study Wave 1– March 2009*

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## **Study Background**

- Mercury Advertising & Travel Montana's new advertising campaign is aimed at Frugal Experientialists\* and GeoCores\* to increase their awareness of Montana and desire to travel to the state.
- Leisure Trends Group was contracted to conduct a proprietary quantitative brand and advertising awareness study to measure this campaign.
- A Benchmark study was fielded prior to the media launch February 23<sup>rd</sup> and the results are explored in this report. This benchmark was fielded in two cities that will be receiving the advertising campaign and across the U.S. as a control group to compare to the test markets.
- The post study will be fielded the end of April for comparison.

## **Study Objectives**

- Gather benchmark Brand and Advertising Awareness, both Unaided and Aided.
- Measure consideration of travelling to Montana in the next 6-18 months and perceptions of what Montana offers to travelers.
- Understand attributes related to the advertising and the Travel Montana Brand, measuring shifts pre and post advertising.



## Methodology

- Leisure Trends Group fielded an online study with 691 targeted consumers utilizing our exclusive MAAP™ database. These respondents included a mix of Frugal Experientialists\* & GeoCores\* and are referred to as 'Travelers' throughout this report.
  - 221 from Atlanta
  - 244 from Chicago
  - 226 from across the U.S. excluding Georgia, Illinois and Montana
- \*A Dual Survey Methodology was used to ensure accurate targeting of Frugal Experientialists\* and GeoCores\*:
  - All respondents were segmented via a screening survey regarding their attitudes towards travel to best fit the target profiles\*. Those qualifying were selected to participate in the benchmark survey or held in reserve for the post study.

## Analytic Notes

- Statistical Significance: Conclusions are made using a statistical exercise known as Significance Testing. Significance Testing determines whether the results are “statistically” different, or the results are merely a “numeric fluctuation” in the data. All of the results in this report are tested at the 95% confidence level – a stringent and typical standard. This means that if the study was conducted 100 times, we would expect to see the same conclusion 95 out of those 100 times.
- Base Sizes: The base size is noted for every chart in this report, as it varies based on how many respondents answered each question. Six hundred and ninety-one respondents finished the survey; however, some base sizes will note a higher level of response due to some respondents dropping out mid-way through the survey.



Subgroup analysis is presented where relevant.\* These subgroups are divided as follows:

- Atlanta: Those who live in the Atlanta, Georgia metro area
  - Chicago: Those who live in the Chicago, Illinois metro area
  - Random US: Those who do not live in Montana, Georgia or Illinois (control group for test markets)
- 

- Gen Y: Those between the ages of 16 and 27
  - Gen X: Those between the ages of 28 and 41
  - Boomers: Those between the ages of 42 and 60
  - Eisenhower Generation: Those 61 and older
- 

- Aware MT: Those who were aware of Montana as a travel destination, unaided or aided
- Unaware MT: Those who were unaware of Montana as a travel destination, unaided or aided
- Ad Aware: Those who were aware of Montana advertising, unaided or aided
- Ad Unaware: Those who were unaware of Montana advertising, unaided or aided

\*Complete Subgroup data is provided in the tabs as an appendix.



# *Executive Summary*



- Montana's baseline unaided awareness registers at 20% for the U.S. and 8-9% in both test markets.
  - Unaided advertising awareness for Montana is just 6% nationwide and registers at 1% in both test markets.
  - Aided awareness is 77% for Montana and shows similar levels in Chicago (73%) and Atlanta (74%).
  - Glacier National Park (87%) and Yellowstone National Park (96%) lead aided awareness.
- The majority (89%) of Travelers who are aware of Montana are familiar with the state.
  - While directional in nature due to the small base size, those who are aware of Montana's advertising (19%) are more likely to say they know the state very well than those unaware of the advertising (7%). This group also is more likely to believe Montana offers images represented in the advertising. These effects will likely increase when the new advertising campaign results are felt in the marketplace.
  - Magazines (64%) are the top place for Travelers to have seen the advertising.
- Montana equals wide open spaces and mountains. The majority of Travelers comment on the vastness of Montana's natural beauty, as well as describing the state as a perfect destination for outdoor activities.
  - *"A natural, rugged experience for people who value the outdoors."*
  - *"A chance to experience one of the last great wild places in the lower 48."*
- The key attributes "Spectacular, unspoiled nature" (4.5), "Breathtaking experiences" (4.2) and "Offers a sense of discovery" (4.1) register near the top of all attributes associated with Montana.
- Eighteen percent of Travelers are likely to travel to Montana in the next 18 months. Atlanta (16%) and Chicago (17%) show a similar baseline response.
  - Friends and family and the National Parks drive interest in visiting Montana.
  - Friends and family (79%) are also credited as the top source of information for Travelers when becoming aware of destinations. The younger generations are significantly more influenced by this word of mouth recommendation.
- For the 57% of Travelers who are not likely to travel to Montana in the next 18 months, other destinations coming first on their list is their top reason. Thinking nothing interests them in Montana, that it is too far away and their travel budget being squeezed are also factors.
- Montana offers a contrast to Travelers-many spoke of the relaxing, peaceful nature of the state, while also seeing it as a place for adventure.
  - *"Rugged hard core good times. This is not for wimps."*



## **FINDINGS**

- Unaided awareness and travel intention figures show strong baseline levels which the advertising campaign should directly impact.
- Those aware of the advertising are more familiar with what Montana offers.
- Those who are aware of Montana are more likely to plan to travel to the state in the next 18 months.

- National Parks drive interest in Montana, and also lead in awareness.

- Friends and family are top sources of information for both Montana and all destinations, particularly for Gen Y and Gen X.

## **OPPORTUNITIES**

- The wave two study will provide more statistically valid base sizes to show the relation between advertising awareness, familiarity and intent to travel.

- Current advertising's inclusion of these parks should yield strong benefits.

- Capitalizing on this word of mouth referral system through social media is critical to positively impact the younger generations.



***Detailed Findings***



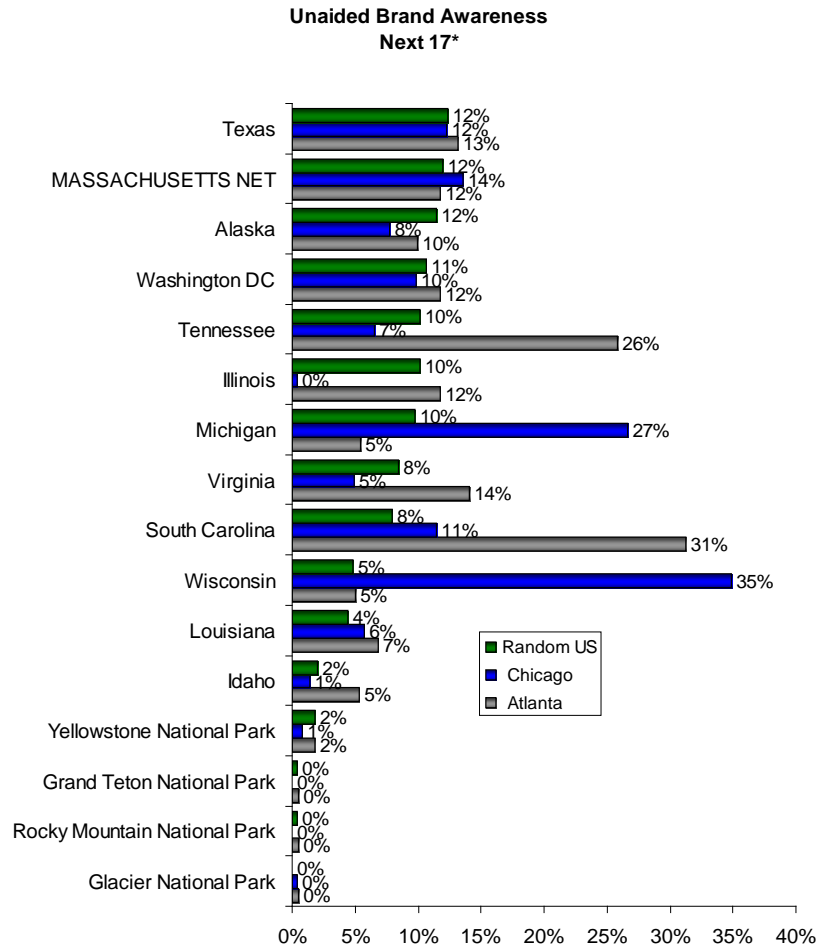
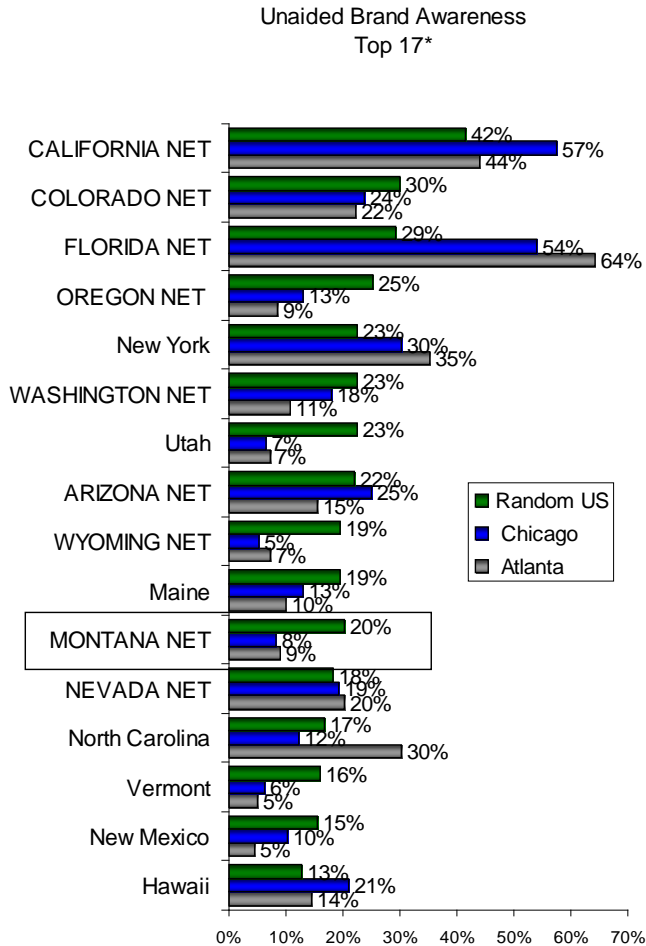
# ***Brand Awareness & Perceptions***



# Montana's Unaided Awareness at 20%

Q: Thinking about all of the destinations within the United States, but outside your home state available for you to chose from for these non-business trips, please list all of the states that come to mind?

One in five (20%) Travelers mention Montana when asked about travel destinations available to them. In the test markets of Chicago and Atlanta, unaided awareness for Montana registers at 8% and 9%, respectively.



Base = 226 Random US, 244 Chicago, 221 Atlanta Respondents

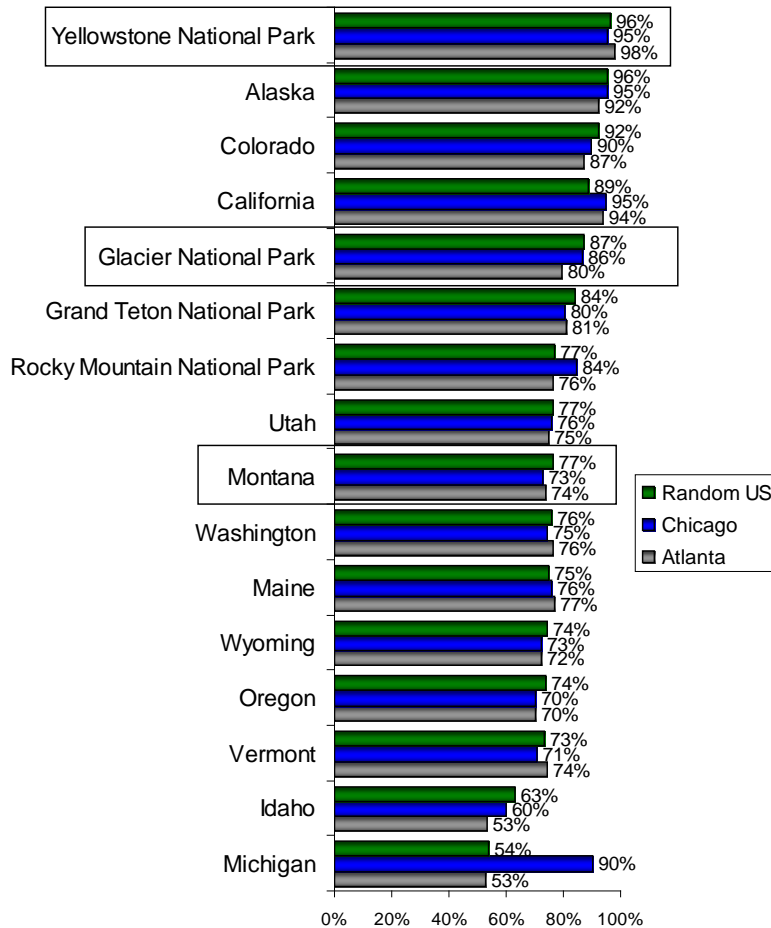
\*NET includes mentions of specific cities or parks/attractions within that state. Yellowstone NP included in MT NET, and not included in WY NET. Destinations with lower than 2% awareness for the Random US population not shown, with the exception of the parks.



# National Parks lead Aided Brand Awareness

Q: Are you aware of the following locations as travel destinations?

Aided Brand Awareness



Nearly all (96%) Travelers are aware of Yellowstone National Park and 87% are aware of Glacier National Park. Almost eight in ten (77%) overall are aware of Montana while 73% are aware in the test market of Chicago and 74% aware in Atlanta.

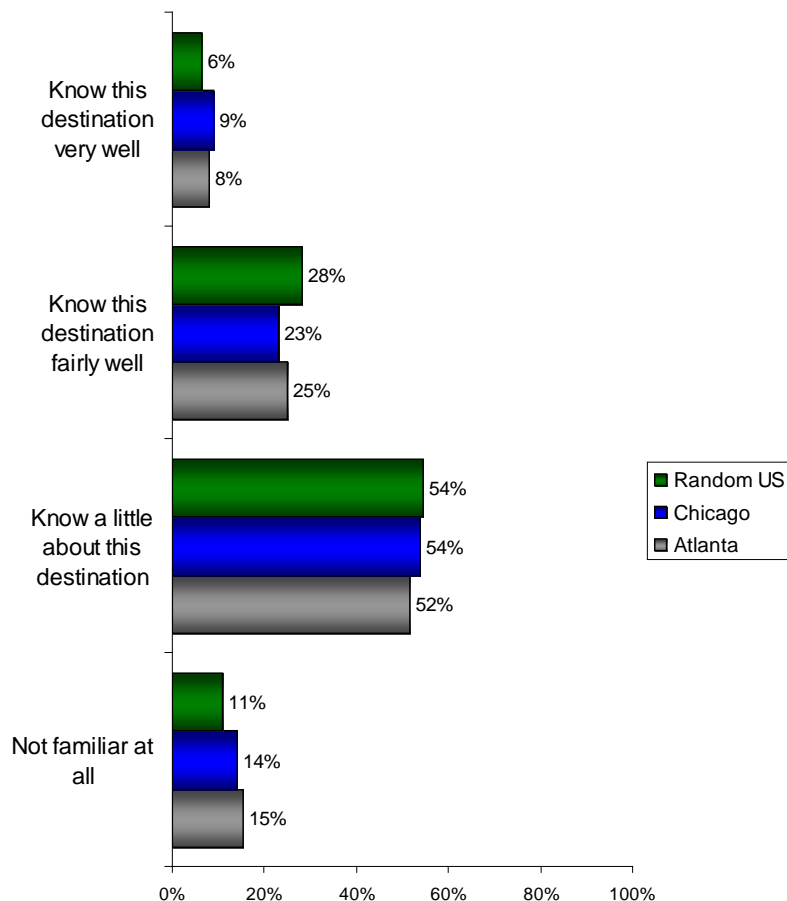
Base = 226 Random US, 244 Chicago, 221 Atlanta Respondents



# Majority have some knowledge of Montana

Q: How familiar are you with the following destinations?

Familiarity with Montana



Eighty-nine percent of Travelers who are aware of Montana know at least a little about the state. This is true for both test markets as well.

- Women (16%) are significantly more likely to say they are not familiar at all with Montana than men (10%)
- Boomers (30%) are significantly more likely than Gen X Travelers (18%) to say they know Montana fairly well.
- While directional in nature due to the small N size, those Travelers who are aware of Montana advertising (19%) are more likely to say they know Montana very well than those who are unaware of the advertising (7%).



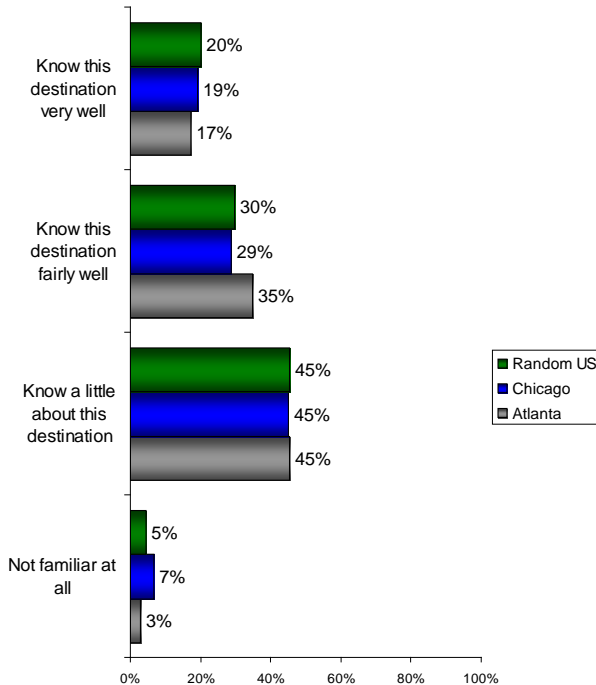
# National Parks in Montana also well known

Q: How familiar are you with the following destinations?

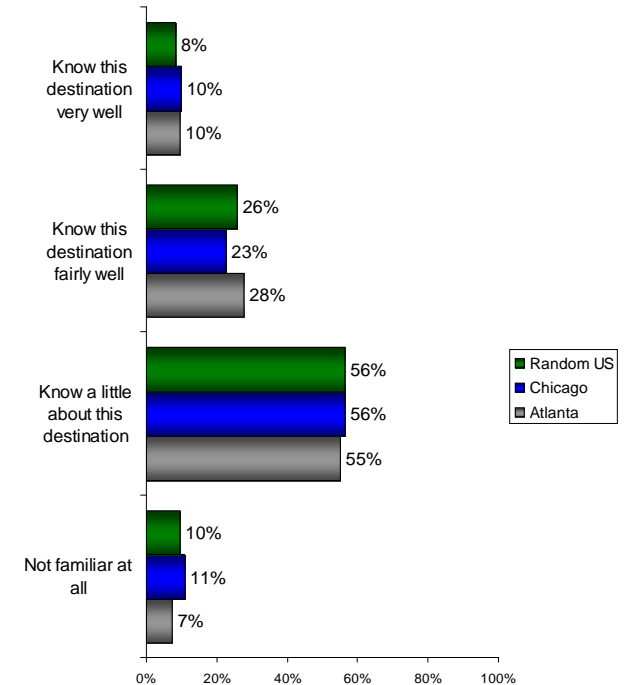
Ninety-five percent of Travelers have some knowledge of Yellowstone National Park and 90% have knowledge of Glacier National Park.

- Men (23%) are more likely to know Yellowstone very well compared to women (16%) as well as knowing Glacier fairly well (28%) compared to women (21%).
- The Eisenhower Generation (38%) and Boomers (34%) are more likely to know Yellowstone fairly well compared to Gen X Travelers (25%).
- While directional in nature due to the small N size, those who are aware of Montana advertising (40%) are more likely to say they know Glacier fairly well than those who are unaware of the advertising (23%).

Familiarity with Yellowstone National Park



Familiarity with Glacier National Park



Base = Varies based on awareness

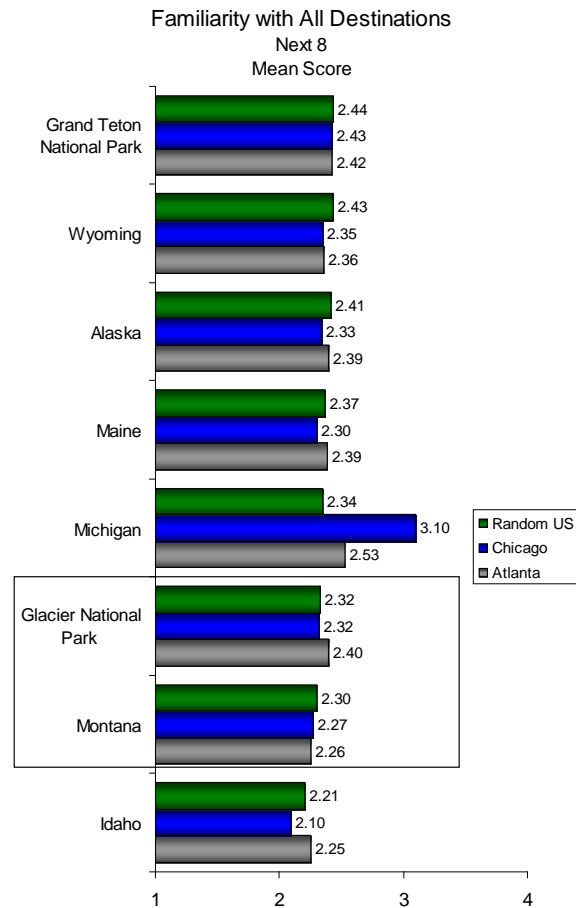
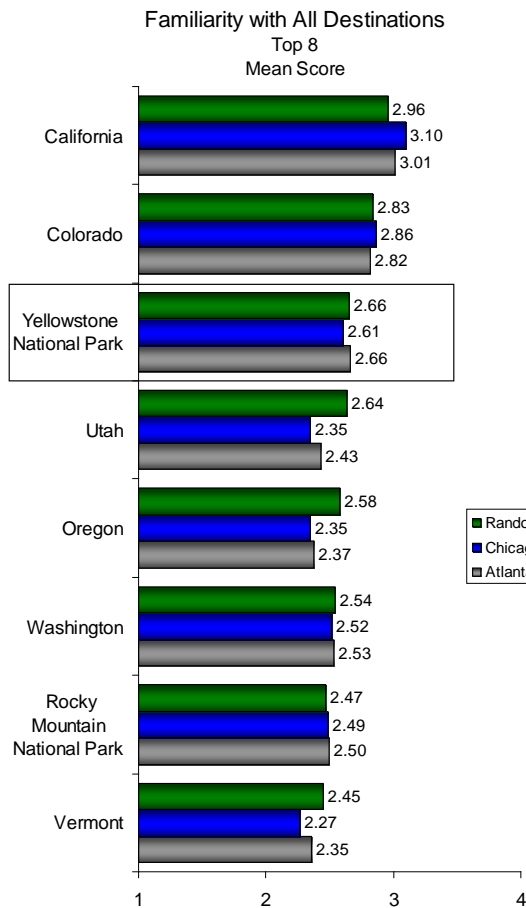
Sub-segment data provided in tabs: Pages 45 & 46



# California & Colorado lead in familiarity

Q: How familiar are you with the following destinations?

Yellowstone National Park follows only California and Colorado in familiarity with Travelers.



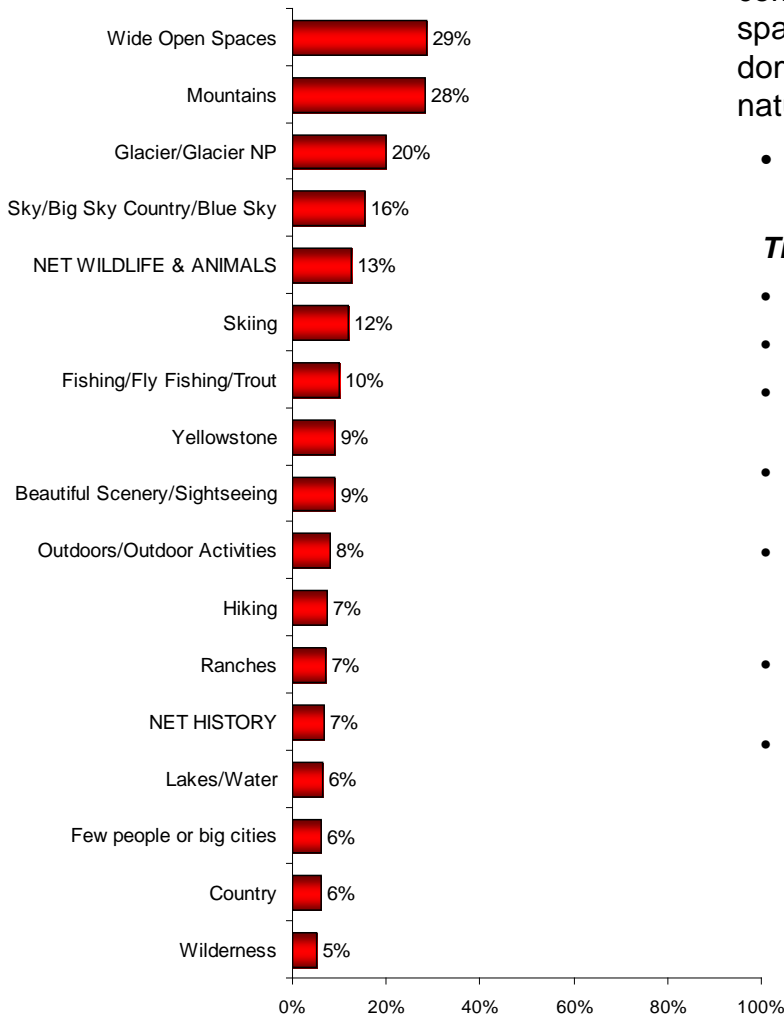
Base = Varies based on awareness



# Montana = wide open spaces & mountains

Q: You mentioned being familiar with Montana as a travel destination. In your own words, please describe what comes to mind when you think of Montana?

Familiarity with Montana  
Top 17



When Travelers who are familiar with Montana describe the state, the most common answers reflect the vastness of its natural beauty- the wide open spaces, mountains and sky. Activities such as skiing, fishing, and hiking also dominate the responses as well as words which capture the wild, un-crowded nature of the state.

- There were no major differences in the way Travelers from each test market viewed Montana versus the Random US group.

### Traveler Comments:

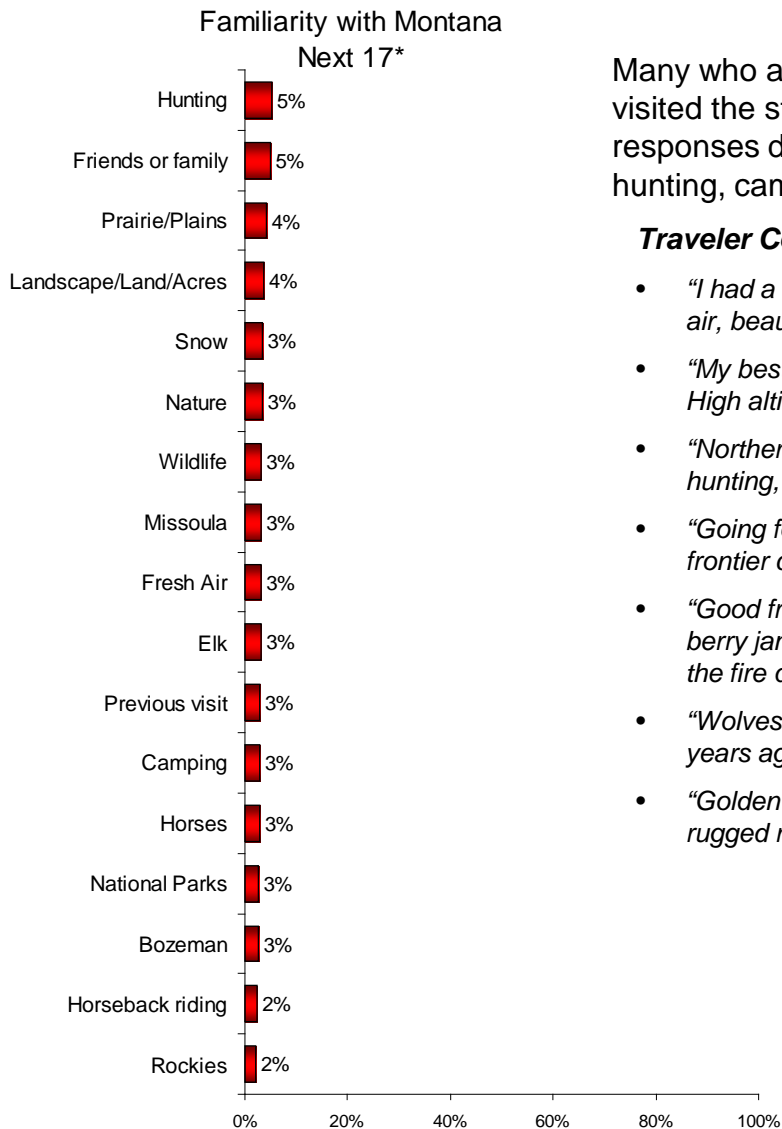
- *"A whole lot of nothing. Openness."*
- *"Wide open spaces, beautiful sky, lots of animals that are rarely seen in the south."*
- *"Big blue sky just like its advertised. Big majestic mountains, lots of snow in winter. great skiing. Excellent hiking during warmer months."*
- *"Montana is the home of wide open spaces with some great skiing and hunting opportunities."*
- *"Two different things come to mind, one going to a place cold to ski and enjoy the snow and another is a ranch to ride horses and enjoy the beautiful open range and mountains"*
- *"Riding my motorcycle through the Bitterroot Mountains, and visiting the historical sites along the Lewis and Clark Trail."*
- *"Custer's Last Stand, Yellowstone, The Rockies, Grizzly bears, Elk, trout fishing, wide open spaces that I love and long for..."*

Base = 464 Travelers Familiar with Montana



# Personal experience drives perceptions of Montana

Q: You mentioned being familiar with Montana as a travel destination. In your own words, please describe what comes to mind when you think of Montana?



Many who are familiar mention friends or family living in Montana or having visited the state and experienced its natural wonders personally. Many responses describe the prairies in contrast to the mountains. Activities such as hunting, camping and horseback riding are also popular.

### Traveler Comments:

- *"I had a friend who lived at the entrance to Yellowstone, I remember him describing clean air, beautiful scenery, great people."*
- *"My best friend's brother works in a national park in Montana, canyons, rivers and rapids. High altitude and horse back riding"*
- *"Northern entrance to Yellowstone. Access to Glacier National Park. Windy grasslands, elk hunting, mule deer hunting and trout fishing."*
- *"Going for miles and miles without seeing another car reminded me I was truly in the frontier country."*
- *"Good friends, a cabin on 10 acres of forest with a river and a creek; relaxation, service berry jam, reading in a hammock while the river runs by and clearing underbrush to lower the fire danger; bears, hummingbirds and mountains."*
- *"Wolves. bears. Wildlife, spectacular scenery, great rivers to fish in. I've visited MT many years ago and long to return."*
- *"Golden plains, brilliant blue skies, miles and miles of virgin trails, free range buffalo, rugged rocky mountains, glacier carved landscapes, fresh air, elk, untouched land."*

Base = 464 Travelers Familiar with Montana

\*Perceptions with lower than 2% incidence for all Travelers not shown.



## ***Advertising Awareness & Understanding***



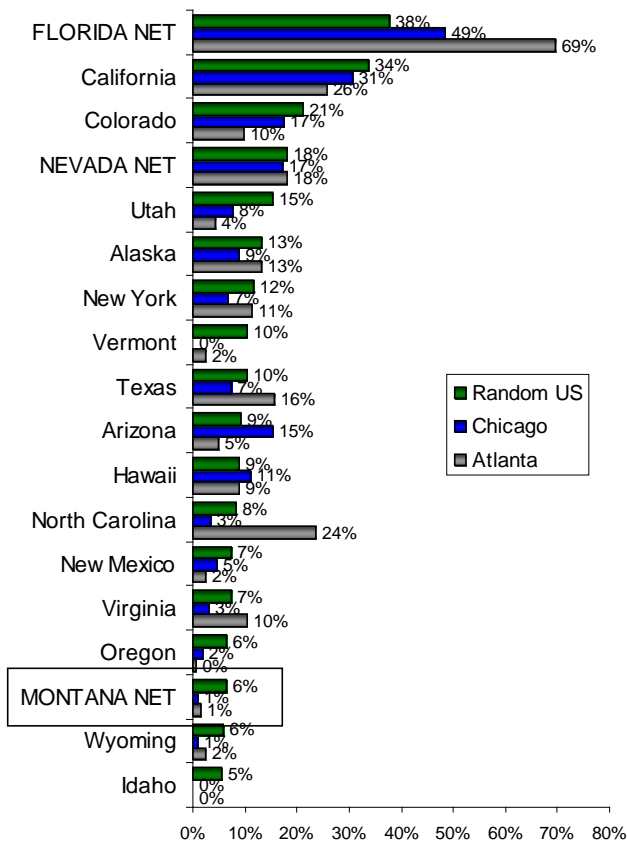
# Montana in top 20 for unaided advertising awareness

Q: What state other than your home state have you seen or heard advertising for in the past three months or so?

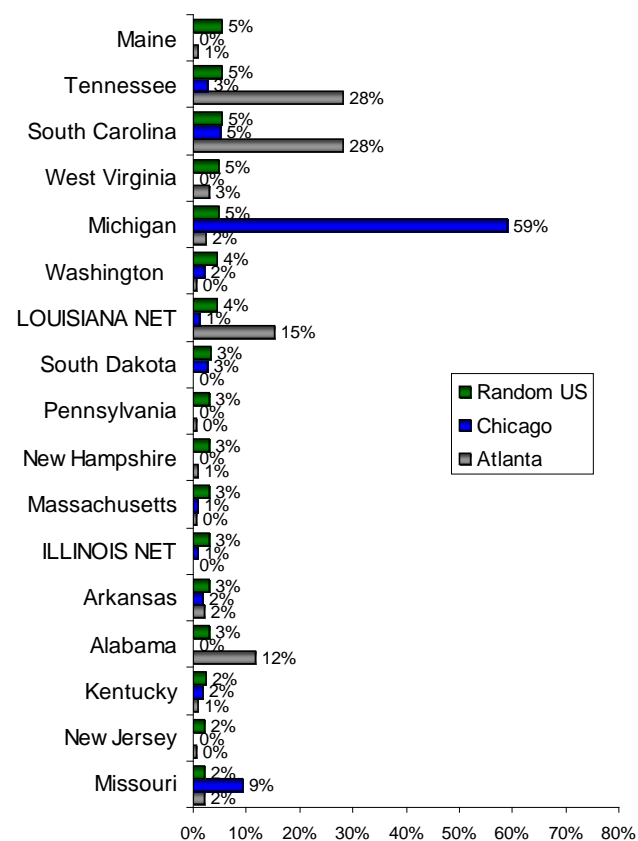
Six percent of Travelers are aware of Montana's advertising.

- In the test markets of Chicago and Atlanta unaided advertising awareness is just 1%.

Unaided Advertising Awareness  
Top 18



Unaided Advertising Awareness  
Next 17\*



Base = 204 Random US, 235 Chicago, 203 Atlanta Respondents

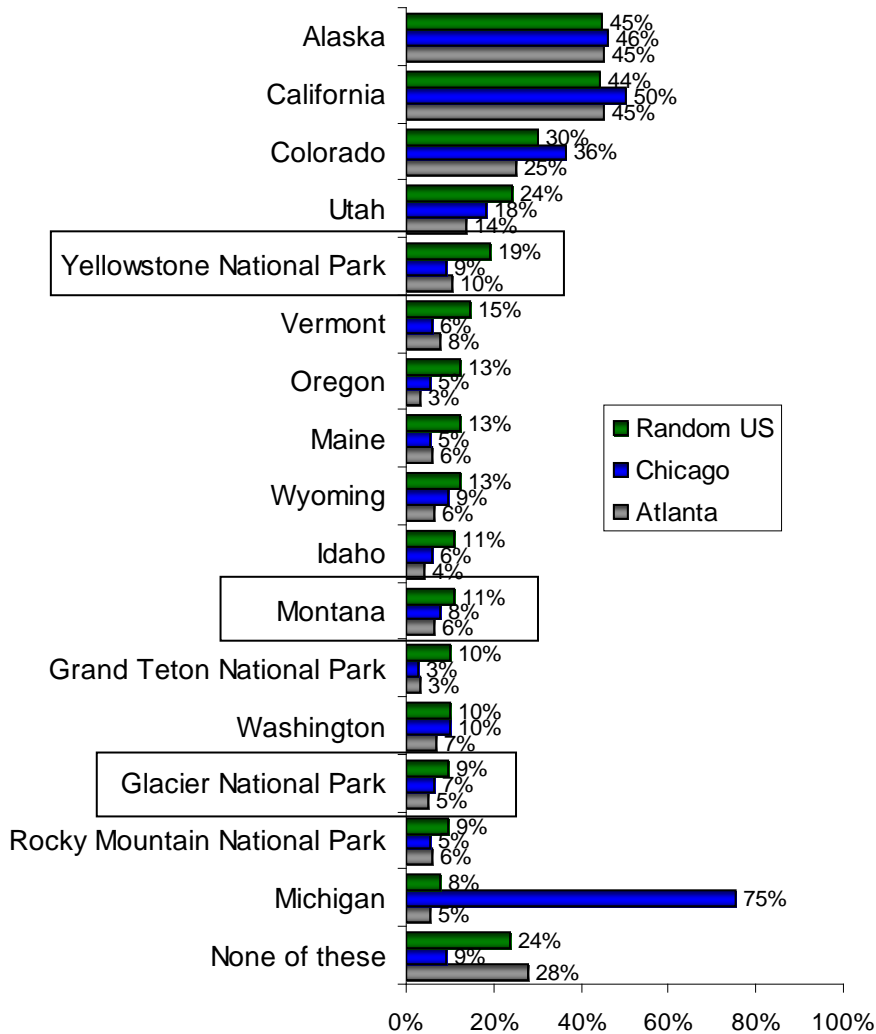
\*NET includes mentions of specific cities or parks/attractions within that state. Destinations with lower than 2% awareness for the Random US population not shown.



# One in ten aware of Montana advertising when aided

Q: Please select all the out-of-state destinations listed below that you have seen or heard advertising for in the past three months or so.

## Aided Advertising Awareness



Just over one in ten (11%) Travelers are aware of Montana’s advertising. Eight percent of Travelers in Chicago are aware of the advertising and 6% are aware in Atlanta.

Yellowstone National Park’s advertising registers with 19% of Travelers.

Base = 226 Random US, 244 Chicago, 221 Atlanta Respondents



# Advertising filled with outdoor activities and scenery

Q: Please describe what you saw or heard in the Montana advertising to the best of your ability.

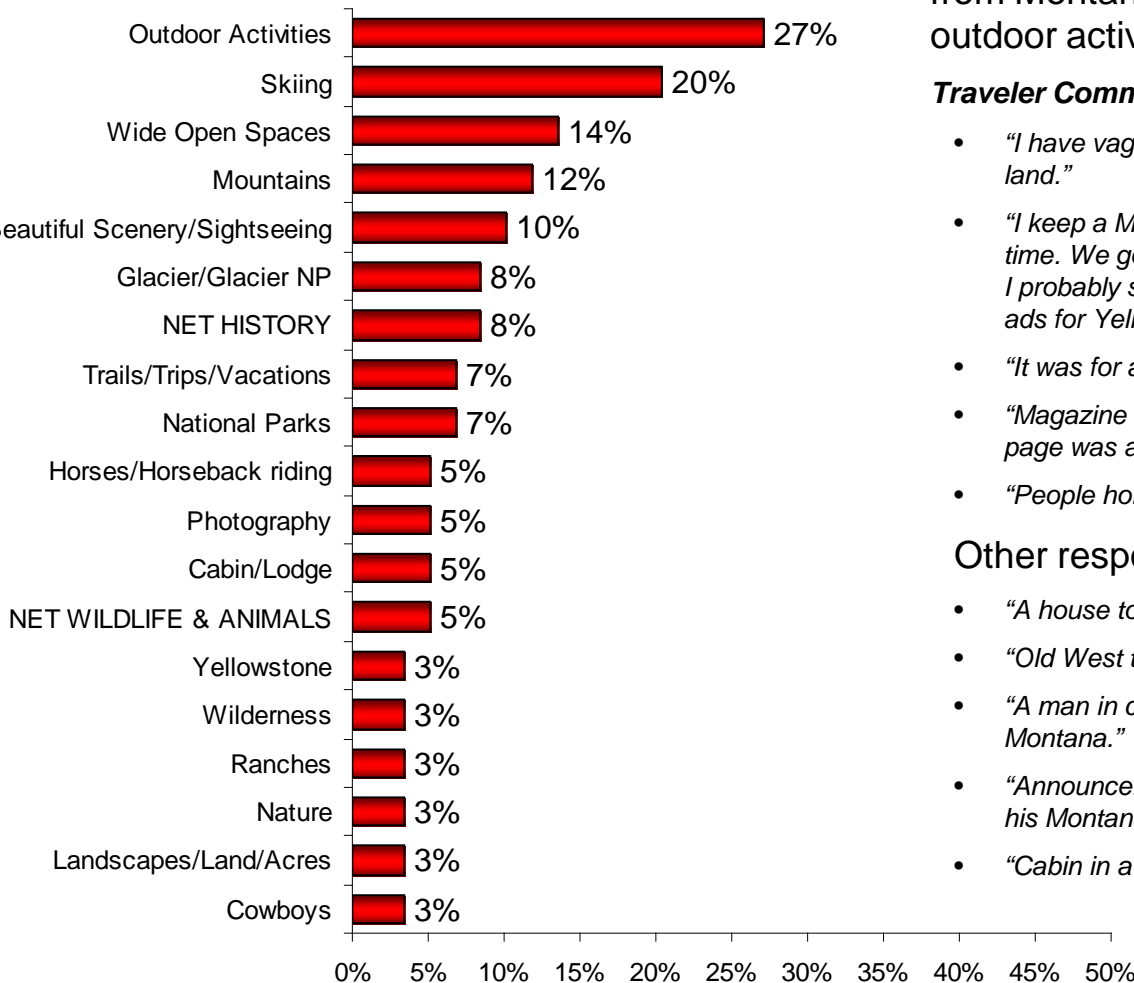
Those Travelers who remember seeing advertising from Montana in the past three months describe outdoor activities set amongst gorgeous scenery.

### Traveler Comments

- "I have vague ideas of hunting and cabins and large expanses of land."
- "I keep a Montana travel magazine in the house to look at all the time. We go there every summer and I gravitate to Montana pictures. I probably saw pictures of large tracts of natural areas. I think I saw ads for Yellowstone NP."
- "It was for a fishing trip to Montana, glossy pictures of beautiful water"
- "Magazine spread about Montana ski resorts and attractions. One page was about Glacier National Park."
- "People horseback riding; beautiful scenery."

### Other responses are more detailed:

- "A house to rent in the mountains surrounded by snow."
- "Old West type commercial inviting adventure."
- "A man in cowboy attire inviting visitors to come and experience Montana."
- "Announcer instructing a recent visitor to embellish his stories about his Montana trip."
- "Cabin in a big open valley with mountains in the background."



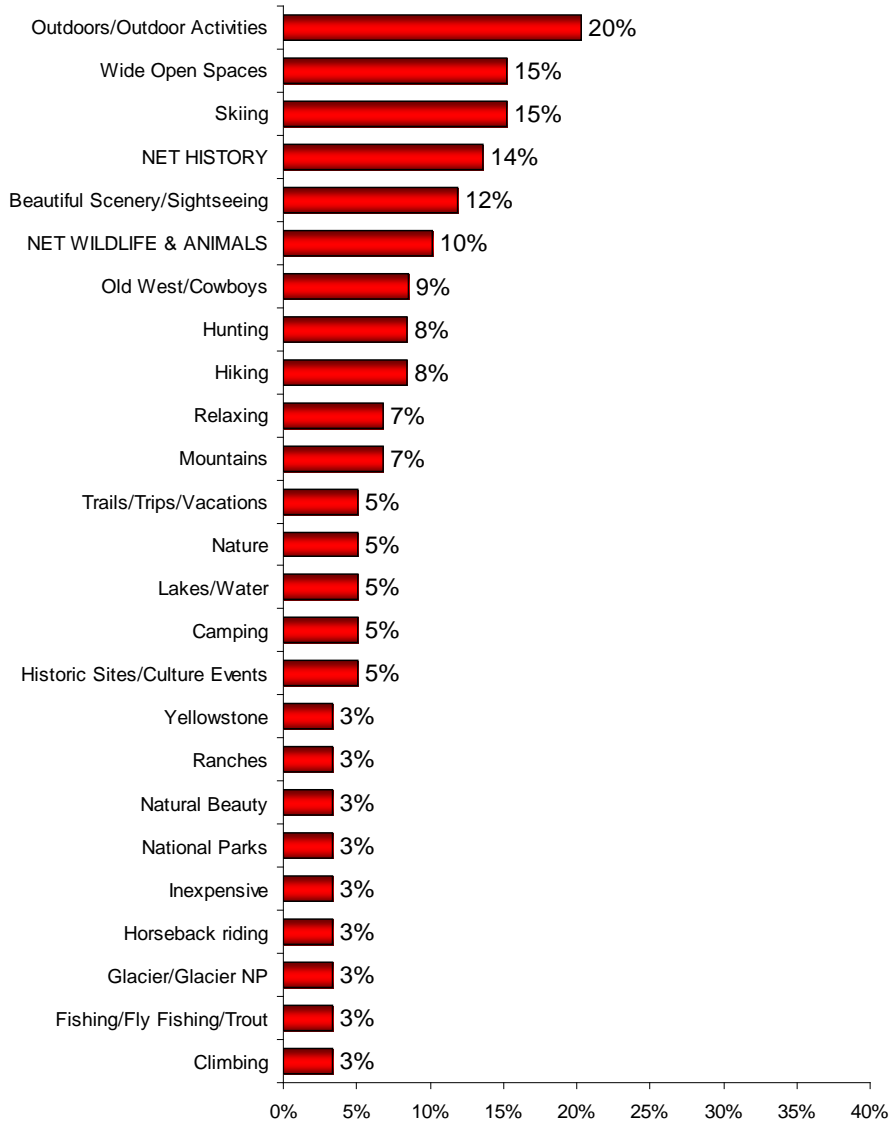
Base = 59 Travelers Aware of Montana's Advertising



# Which translates to what Montana offers

Q: In your own words, what do you understand Montana offers as a travel destination after seeing the advertising?

## Montana offers based on Advertising\*



Travelers who viewed the advertising believe Montana offers the images represented in the advertising-outdoor activities, wide open spaces, historic sites and beautiful scenery. A few also mentioned Montana’s affordability.

### Traveler Comments

- *“It has ski areas and national parks with lots of natural scenery and opportunities for hiking and staying in historic hotels.”*
- *“Montana has it all from beautiful wild areas to rivers and streams, relaxing vacation spots and cultural events and colleges.”*
- *“Beautiful open spaces, mountains, reasonable prices.”*
- *“Hiking, camping, wildlife, ranch-life experiences, skiing.”*
- *“I want to see the open spaces with so few people!”*
- *“The freshest powder on the planet.”*

Several Travelers also commented on the wild west nature of Montana’s history:

- *“Activities associated with horses, and cowboys.”*
- *“Skiing, Yellowstone, old west.”*
- *“A chance to experience one of the last great wild places in the lower 48.”*

Base = 59 Travelers Aware of Montana’s Advertising

\*Comments with lower than 3% incidence not shown.  
NET HISTORY sum of Old West/Cowboys & Historic Sites/Culture Events.

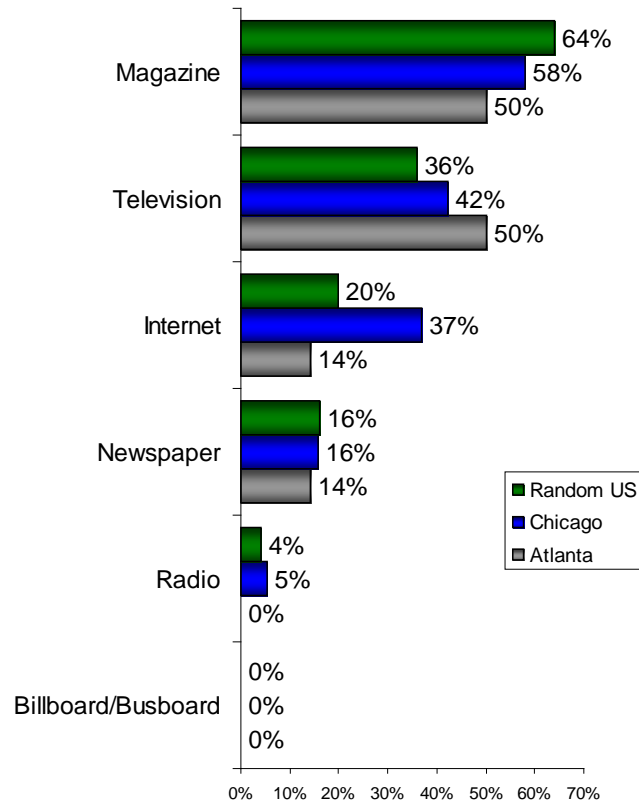


# Magazines dominant source for advertising

Q: Where did you see or hear the advertising for Montana? (Select all that apply)

The majority (64%) of Travelers who viewed the advertising recall seeing it in magazines, followed by television.

### Where See Advertising



Base = 59 Travelers Aware of Montana's Advertising



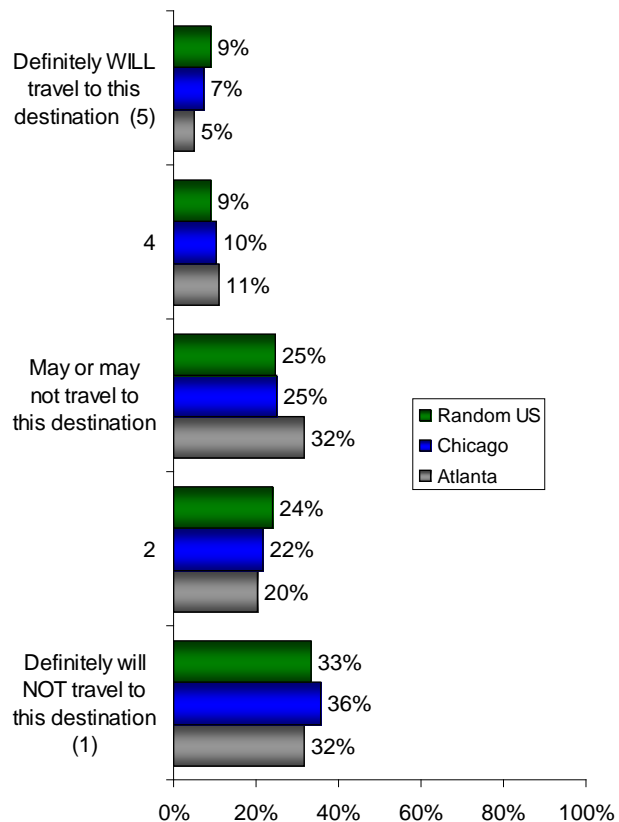
## ***Travel Consideration & Process***



# Eighteen percent likely to travel to MT

Q: What is the possibility that you will travel to the following destination in the next 18 months? (1-5 point scale)

Likelihood to Travel to Montana

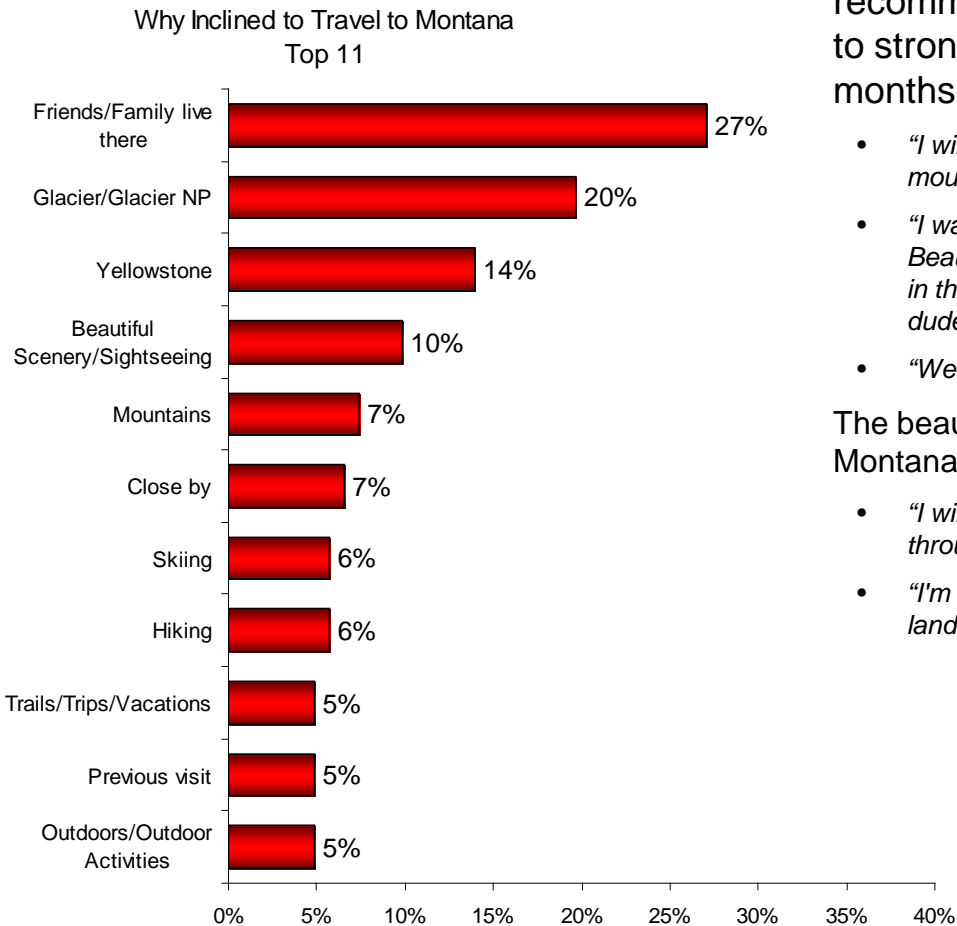


- Eighteen percent of Travelers (combining 4 and 5 score) plan to travel to Montana in the next 18 months with 9% saying they definitely will travel.
- Those aware of Montana (26%) are significantly more likely to plan to travel to the state than those unaware (19%).
- Chicago registers 17% in likelihood to travel to Montana, and 7% definitely will travel.
- Atlanta lags slightly behind with 16% likelihood and just 5% definitely planning to travel to Montana in the next 18 months.
- There are no significant differences in likelihood to travel to Montana by generation, gender or income.



# Friends/family drive this interest in visiting Montana

Q: In your own words, what makes you **inclined** to travel to Montana?



The opportunity to visit friends and family along with their recommendations enticed the majority of travelers (27%) to strongly consider traveling to Montana in the next 18 months.

- *"I will be traveling to visit friends in and around the Montana area and to go mountain biking."*
- *"I want to go skiing and I have friends who have gone there and loved it. Beautiful scenery and fewer crowds. I also am strongly considering going in the summer, since I love mountains and scenery and would like to try a dude ranch."*
- *"We are having a family reunion with 50 people there this summer."*

The beauty of the National Parks was also a specific draw to Montana.

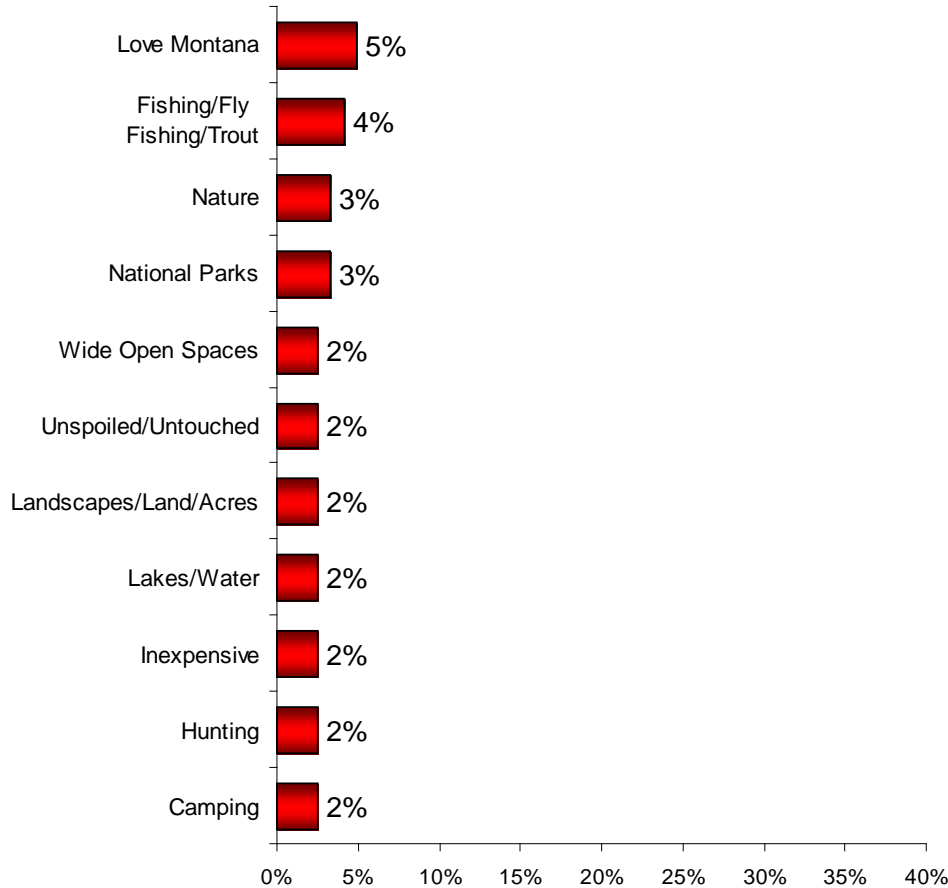
- *"I will go to Montana to get to Glacier, on the way I will hike and camp through the state. Going for the great mountain scenery"*
- *"I'm going to Yellowstone National Park. I'm aware of how incredible the land is there."*

Base = 122 Travelers Might or Definitely Will Travel to MT



Q: In your own words, what makes you **inclined** to travel to Montana?

## Why Inclined to Travel to Montana Next 11\*



Several Travelers commented on how much they enjoy Montana or are longing to visit its unique offerings.

- *"I have traveled through Montana before on a motorcycle trip, and would love to take more time to explore the Bitterroot Mountain area".*
- *"The fact that it seems less visited by others, so perhaps it would be cheaper to travel there, and the fact that my friend had such a good time there."*
- *"I went once as a teenager and would love to go back as an adult. I want to spend more time in Glacier National Park."*
- *"I have been before and loved it. We like to hike and take photos and this is a great place to do these."*
- *"I would like to go to Montana to get away from the hustle and bustle of east coast living."*
- *"I have friends that live there and I would like to take my kids to Glacier Natl. Park before all the ice melts..."*

Base = 122 Travelers Might or Definitely Will Travel to MT

\*Comments with lower than 2% incidence not shown.



# Other destinations taking precedence

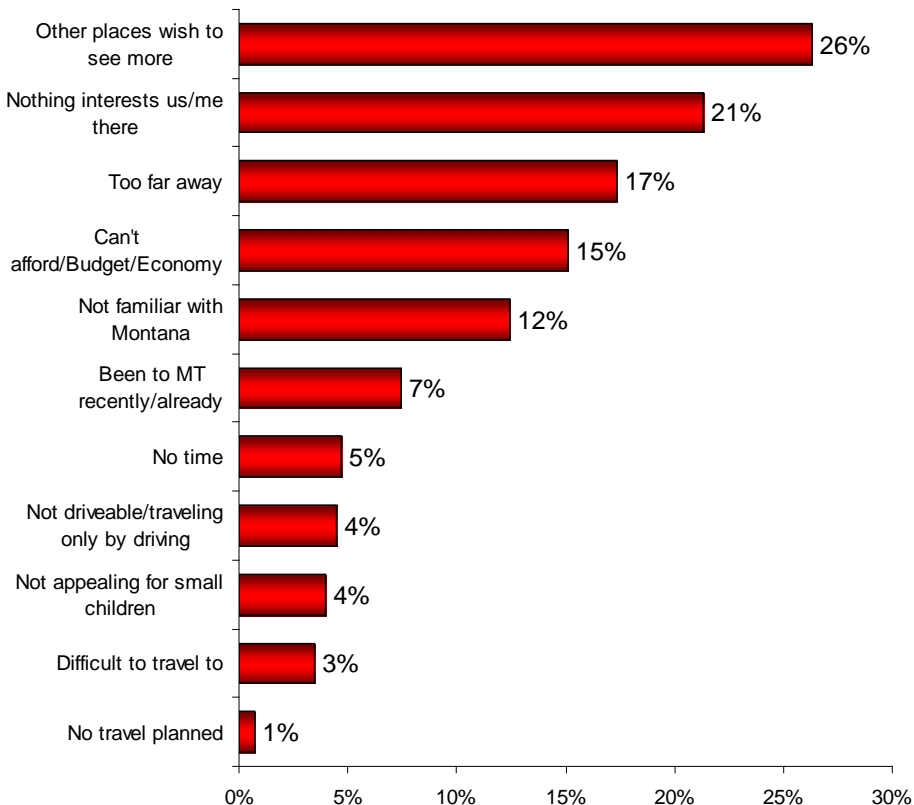
Q: In your own words, what makes you **less** inclined to travel to Montana?

Of those Travelers who are not likely to travel to Montana in the next 18 months 26% have other destinations taking precedence for their travel time and budget.

Twenty-one percent believe there is nothing in Montana they desire to see and 12% simply aren't familiar enough with Montana to know if they would be interested.

- *"Too remote - I enjoy having a mixture of nature and large cities."*
- *"Lack of things to do and see. No cultural experiences."*
- *"Prefer big cities to open space."*
- *"Most of the people that I know that enjoy Montana enjoy it for the hunting or lack of people, and are 50+. I do not feel that I have much in common from many people who enjoy Montana. Also, I usually enjoy what a city has to offer."*
- *"I like to know what activities await me in a particular travel destination. I'm not exactly sure what Montana has to offer. Advertising shows what Montana LOOKS like, but it hasn't really explained what activities are associated with it."*

Why NOT Inclined to Travel to Montana



Base = 403 Travelers Not Likely or Definitely will NOT travel to Montana



# Recession and distance also factors

Q: In your own words, what makes you **less** inclined to travel to Montana?

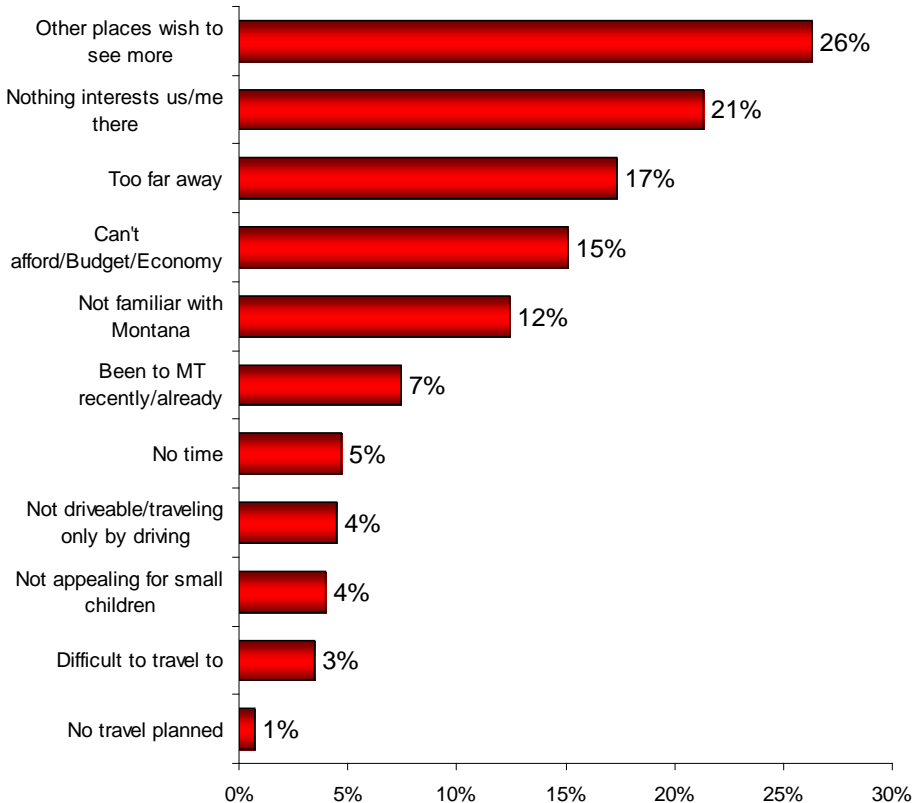
The economy is taking it's toll on 15% of Travelers, and 4% are planning only driving trips for the next year and a half.

- *"I do not have the money I need to fully experience Montana as I like to right now. With a family of four, I cannot afford airfare to get there (and still afford a full vacation). However, I do plan to visit Montana with my family as soon as possible."*
- *"RECESSION! Really scaling back our travel plans in the next 12-18 months. Focusing more on places that can be driven to in under a day."*
- *"We already have our travel plans laid out for the next year or so. Lack of time and money keep us from adding other destinations."*

Four percent have young children and do not feel Montana is an appropriate destination for them yet and 3% believe Montana is difficult to travel to.

- *"We just had a child and won't be doing outdoors type vacation for the next few years."*
- *"Distance-- given my young children."*
- *"Difficult to get to, and little other than scenic vistas."*

Why NOT Inclined to Travel to Montana



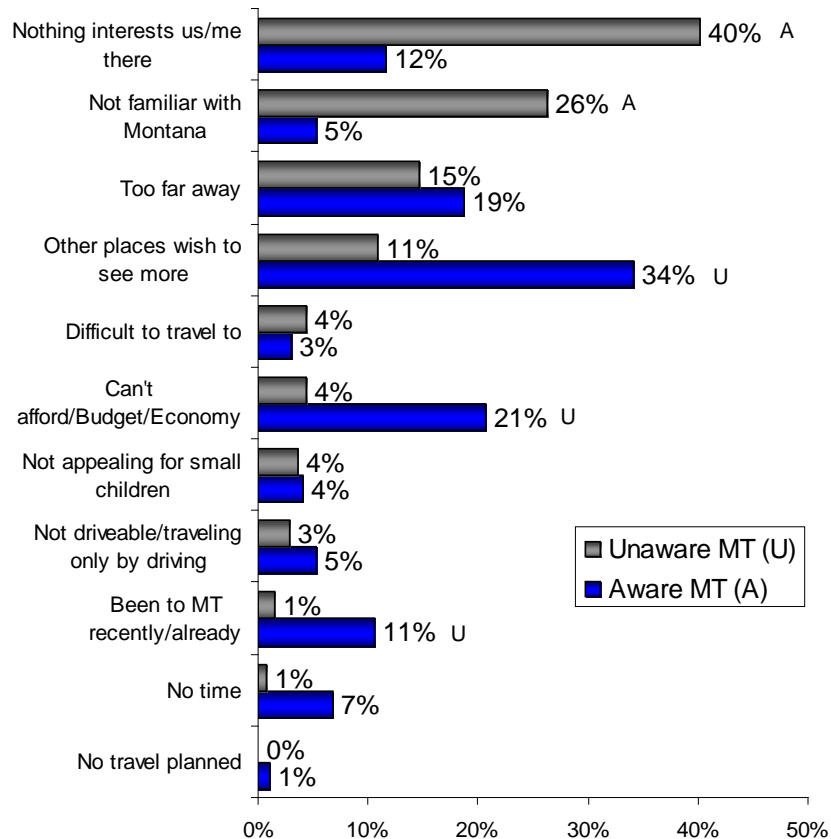
Base = 403 Travelers Not Likely or Definitely will NOT travel to Montana



# Those unaware most likely to think MT uninteresting

Q: In your own words, what makes you **less** inclined to travel to Montana?

### Why NOT Inclined to Travel to Montana by Awareness of MT



Those travelers who are unaware of Montana as a travel destination are significantly more likely to believe that nothing interests them or that they are simply not familiar with Montana.

Significant differences in results between those aware and unaware have been noted with an uppercase letter representing the group it is statistically higher or lower than.

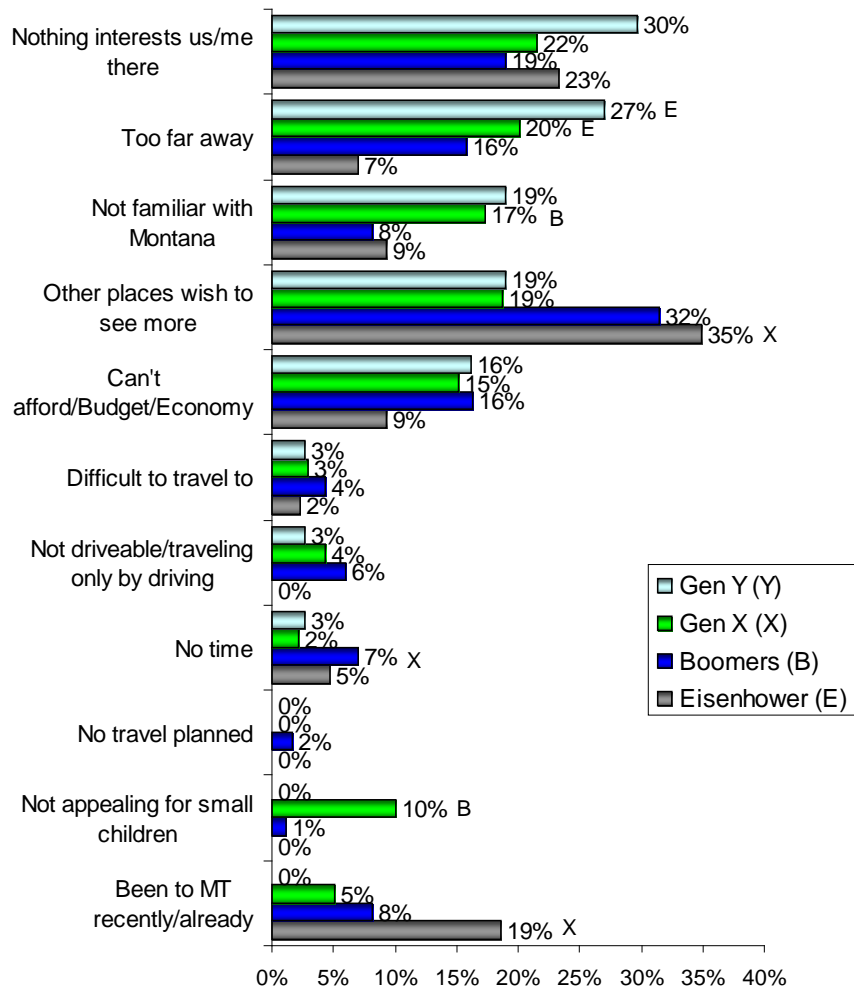
Base = 266 Aware of MT, 137 Unaware of MT Travelers Not Likely or Definitely will NOT travel to Montana



# Younger travelers think MT is too far away

Q: In your own words, what makes you **less** inclined to travel to Montana?

### Why NOT Inclined to Travel to Montana By Generation



Gen Y and Gen X travelers are significantly more likely to believe that Montana is too far away than the Eisenhower Generation.

Significant differences in results between Generations have been noted with an uppercase letter representing the Generation it is statistically higher or lower than.

Base = 37 Gen Y, 139 Gen X, 184 Boomers, 43 Eisenhower Generation Travelers Not Likely or Definitely will NOT travel to Montana

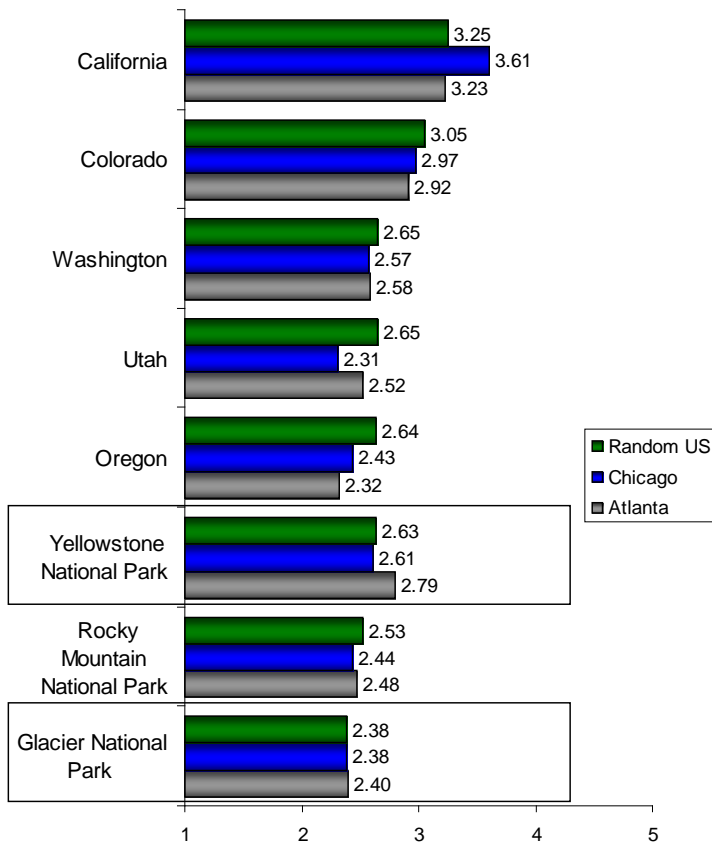


# California tops list of likely travel destinations

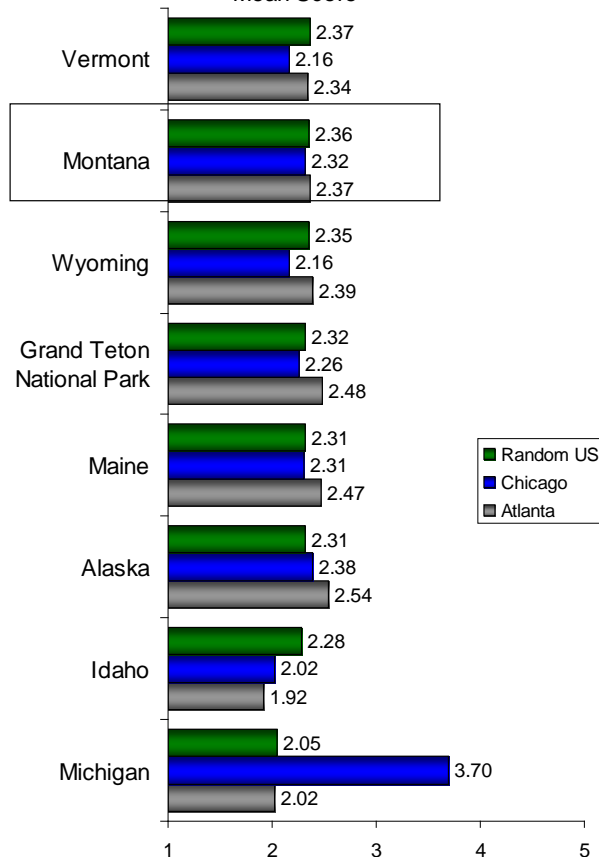
Q: What is the possibility that you will travel to the following destination in the next 18 months?

- California and Colorado are the destinations most likely to be traveled to in the next 18 months.
- There are no differences between Travelers from the test markets and the random US Travelers regarding their plans to travel to Yellowstone National Park, Glacier National Park or Montana.

Likelihood to Travel: All Destinations  
Top 8  
Mean Score



Likelihood to Travel: All Destinations  
Next 8  
Mean Score



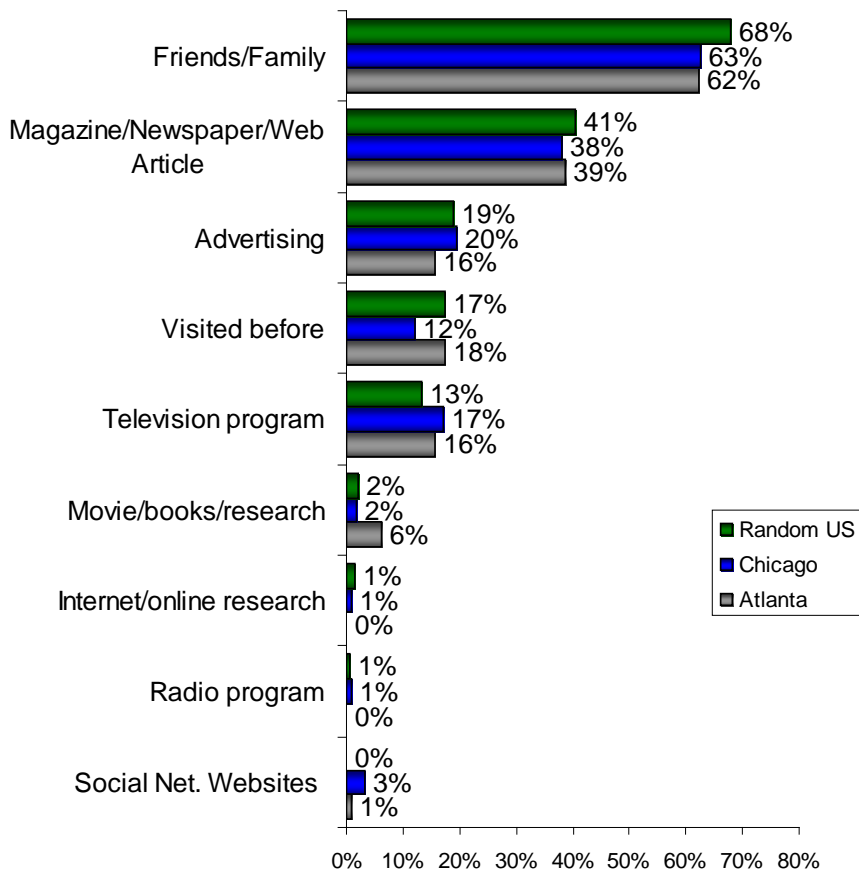
Base = 224 Random US, 244 Chicago, 220 Atlanta Respondents



# Friends/family primary source of information for MT

Q: Do you recall how you heard about Montana as a travel destination? (Multiple responses allowed)

### Source for Montana as a Travel Destination



Almost seven in ten Travelers select friends or family as a source of information for Montana.

Seventeen percent have personal experience with Montana having visited previously.

- Chicago Travelers are the most likely to have heard about Montana through advertising (20%).

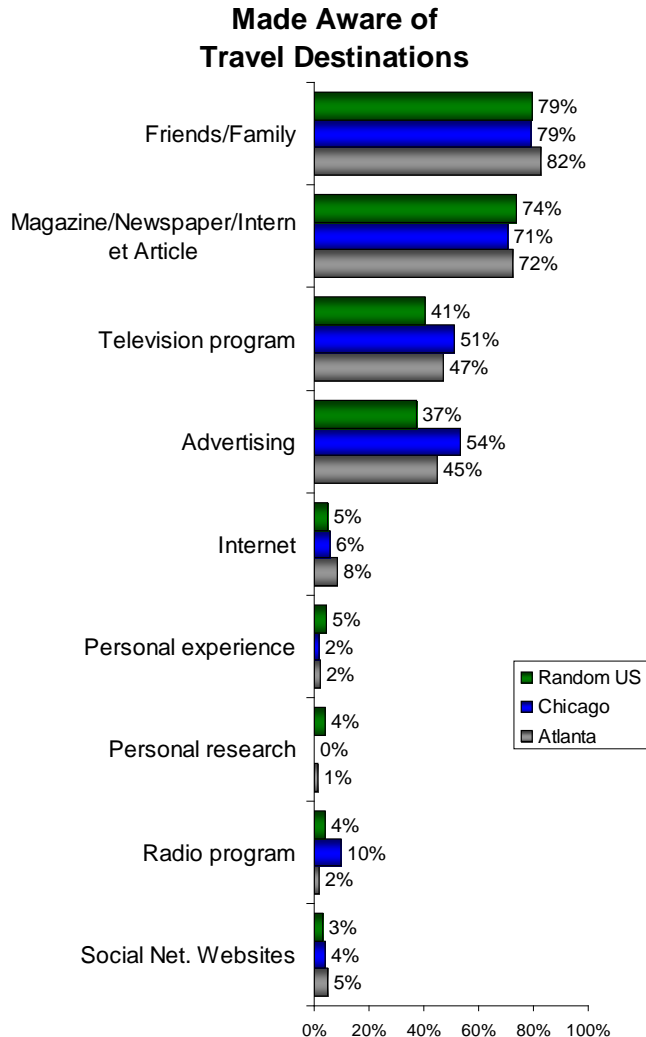
No specific sites mentioned

Base = 396 Travelers Familiar with Montana



# This is the same way they learn about all destinations

Q: How are you typically made aware of possible travel destinations? (Multiple responses allowed)



Base = 219 Random US, 241 Chicago, 217 Atlanta Respondents

The same pattern is repeated when Travelers were asked how they are typically made aware of possible travel destinations.

Five percent wrote in that traveling gives them personal experience with many locations, through neighboring destinations or via goals to do specific activities.

- *“Based on searching where I can do activities I enjoy.”*
- Chicago Travelers (51%) are significantly more likely to become aware of destinations through television programs than the Random US Travelers (41%).
- Chicago Travelers (54%) are also significantly more likely to select advertising as a source than Random US Travelers (37%).

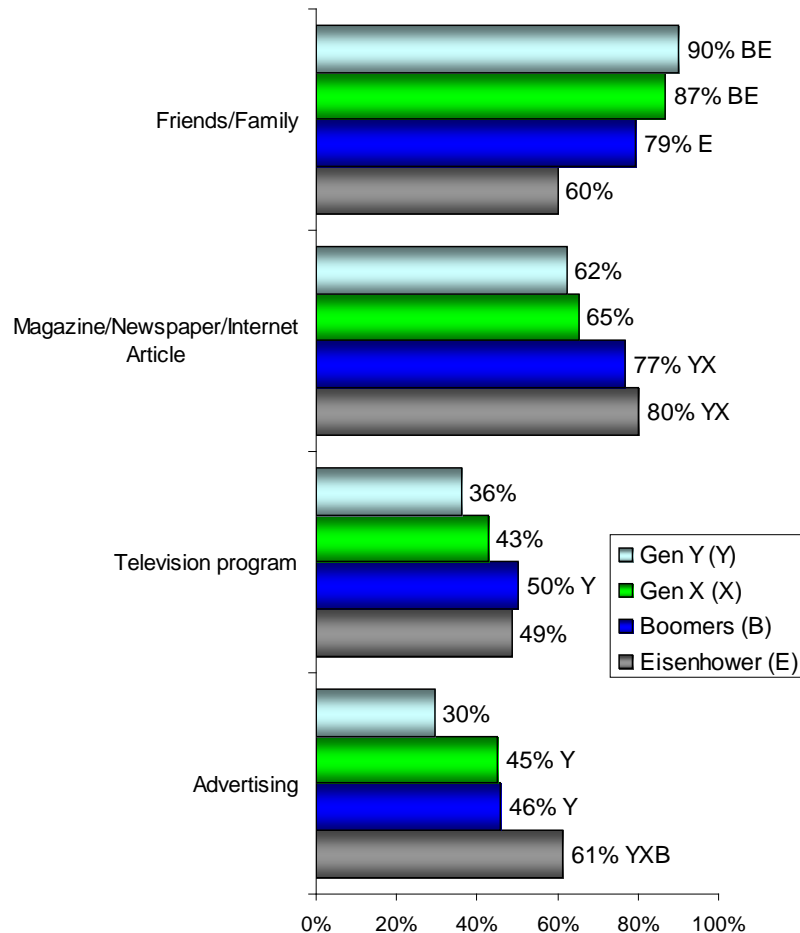
Specific sites mentioned include:

- AAA
- Marathonguide.com
- Expedia
- Travelzoo
- And travel websites/vacation searches



Q: How are you typically made aware of possible travel destinations? (Multiple responses allowed)

### Made Aware of Travel Destinations By Generation



## How Travelers are made aware of possible travel destinations differs significantly by age.

- The Eisenhower Generation (61%) is the most likely to select advertising as a source of information for travel destinations, and both Boomers (46%) and Gen X (45%) rate it significantly higher than Gen Y (30%).
- Gen Y (90%) and Gen X (87%) are significantly more likely to be made aware by friends/family than Boomers (79%) or the Eisenhower Generation (60%).
- Boomers (77%) and the Eisenhower Generation (80%) are significantly more likely to be made aware through magazines, newspaper or Internet articles than Gen X (65%) or Gen Y (62%).
- Boomers (50%) are also more likely than Gen Y (36%) to list television programming as a source of information for travel destinations.

Significant differences in results between Generations have been noted with an uppercase letter representing the Generation it is statistically higher or lower than.



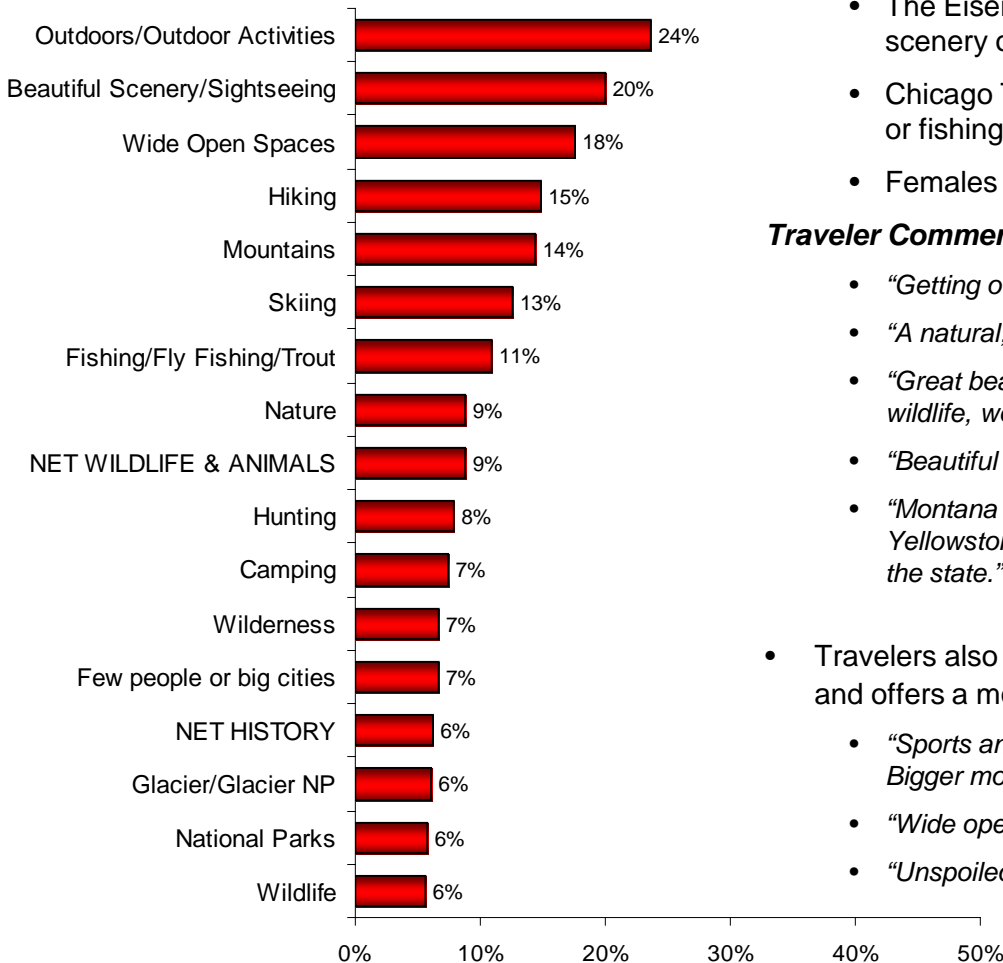
## ***Brand & Competitive Associations***



# Montana offers outdoor activities and beautiful scenery

Q: In your own words, what does Montana offer to travelers?

Montana Offers  
Top 17



- Outdoor activities and beautiful scenery tops the list of what Travelers believe Montana offers. Specific outdoor activities such as hiking, skiing, fishing and viewing wildlife are also frequent responses.
  - The Eisenhower Generation (42%) is more likely to mention the beautiful scenery or sightseeing than Boomers (21%) or Gen X Travelers (16%).\*\*
  - Chicago Travelers (11%) are less likely to mention hiking (11% vs. 20%) or fishing (7% vs. 15%) than the Random US group.\*\*
  - Females (18%) are also more likely to say hiking than males (11%).

### Traveler Comments:

- *"Getting outdoors-western style"*
- *"A natural, rugged experience for people who value the outdoors."*
- *"Great beauty, outdoor activities, wide open spaces, incredible mountains, rivers, wildlife, western lifestyle, nice people, skiing, hiking and exploring..."*
- *"Beautiful mountain destinations, lakes and scenery."*
- *"Montana offers wide open nature and lots of possibilities. Places like Glacier and Yellowstone are unique, Oberlin is beautiful, and there is a lot of history built into the state."*
- Travelers also like the fact that Montana is not as crowded as other destinations and offers a more wild, untouched atmosphere.
  - *"Sports and outdoors without the major crowds and congestion on the east coast. Bigger mountains more untouched natural environment."*
  - *"Wide open spaces that are peaceful and free from traffic and crowds."*
  - *"Unspoiled wilderness from plains to mountains and glaciers."*

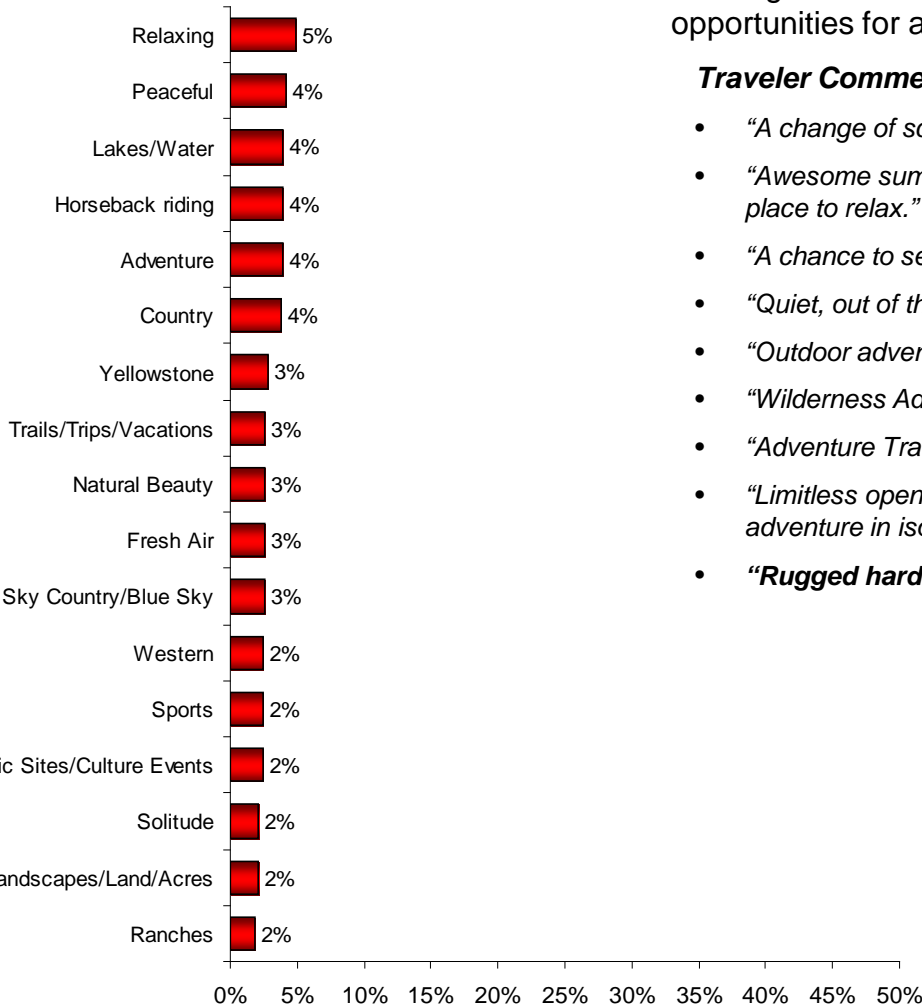
Base = 534 Travelers Aware of Montana



# Montana offers relaxation as well as adventure

Q: In your own words, what does Montana offer to travelers?

Montana Offers Next 17\*



Montana also offers a contrast to Travelers-many spoke of the peaceful, relaxing nature of the destination, while also seeing Montana as offering opportunities for adventure and challenge.

### Traveler Comments:

- *“A change of scenery, wilderness, peacefulness”*
- *“Awesome summer and winter sports. Laid back atmosphere. No sales tax. Great place to relax.”*
- *“A chance to see wide-open spaces and a more simple, relaxed way of life.*
- *“Quiet, out of the way vacation, time to relax and get in touch with nature.”*
- *“Outdoor adventure, peace, solitude, grasslands, prairies, Mountains, friendly people.”*
- *“Wilderness Adventures”*
- *“Adventure Travel”*
- *“Limitless open wilderness. To me, going backpacking in Montana would be an adventure in isolation.”*
- ***“Rugged hard core good times. This is not for wimps.”***

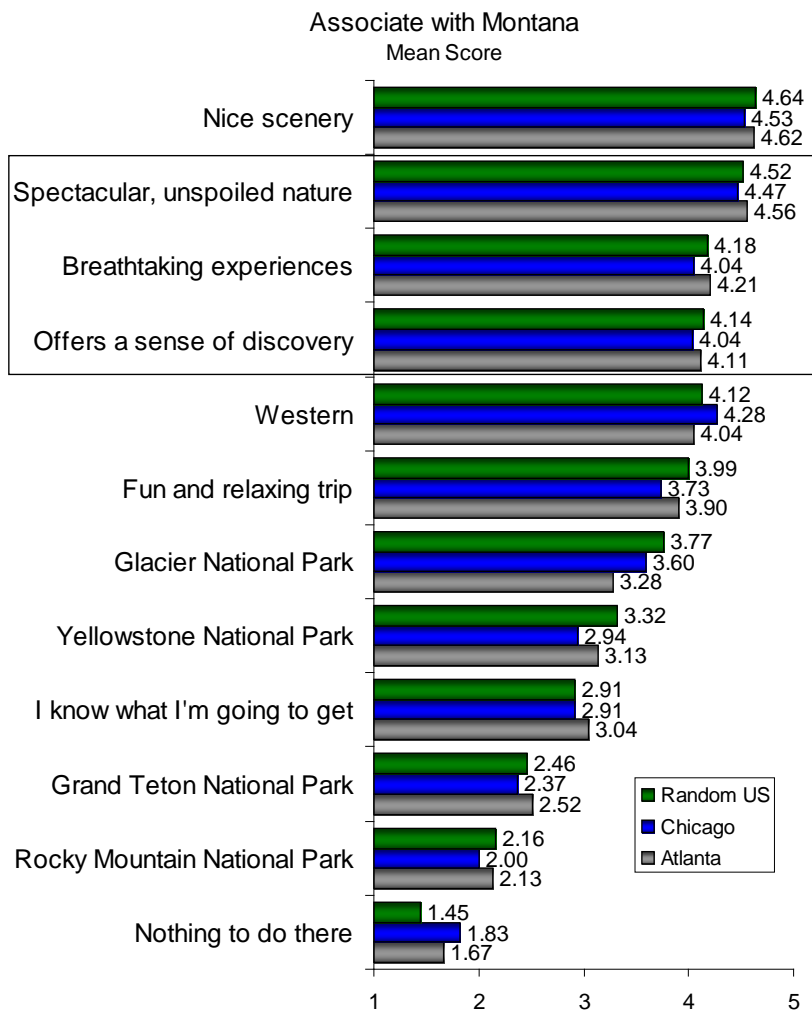
\*Responses with lower than 2% incidence for all Travelers not shown.

Base = 534 Travelers Aware of Montana



# Key attributes strongly associated with Montana

Q: Rate each of the following in terms of how much you associate it with Montana.



The key attributes focused on in the advertising lead the list of associations Travelers have with Montana. This is similar across test markets.

- Boomers (4.2) and the Eisenhower Generation (4.4) are significantly more likely to associate Montana with 'Western' than Gen Y (3.7).
- Boomers (3.0) and the Eisenhower Generation (3.3) are also more likely to associate Montana with 'I know what I'm going to get' than Gen Y (2.6).

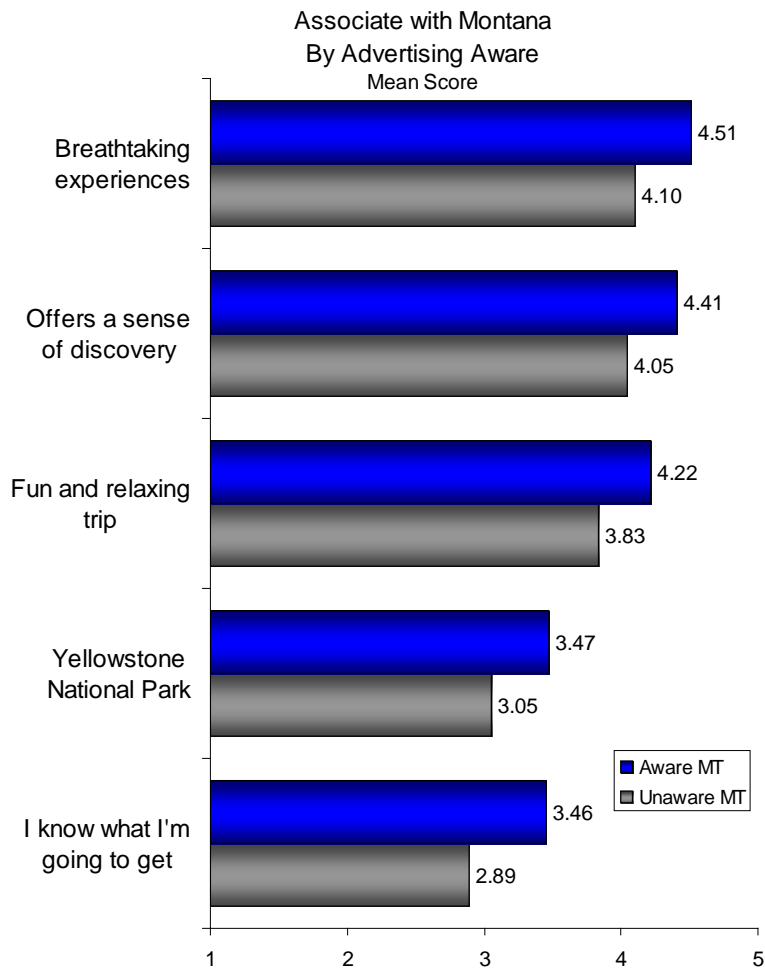
Base = 535 Travelers Aware of Montana

Sub-segment data provided in tabs: Page 238



# Advertising delivering on two attributes

Q: Rate each of the following in terms of how much you associate it with Montana.



Those Travelers who are aware of Montana advertising are significantly more likely to associate Montana with several attributes including 'breathtaking experiences' and 'offers a sense of discovery' than those unaware of the advertising.

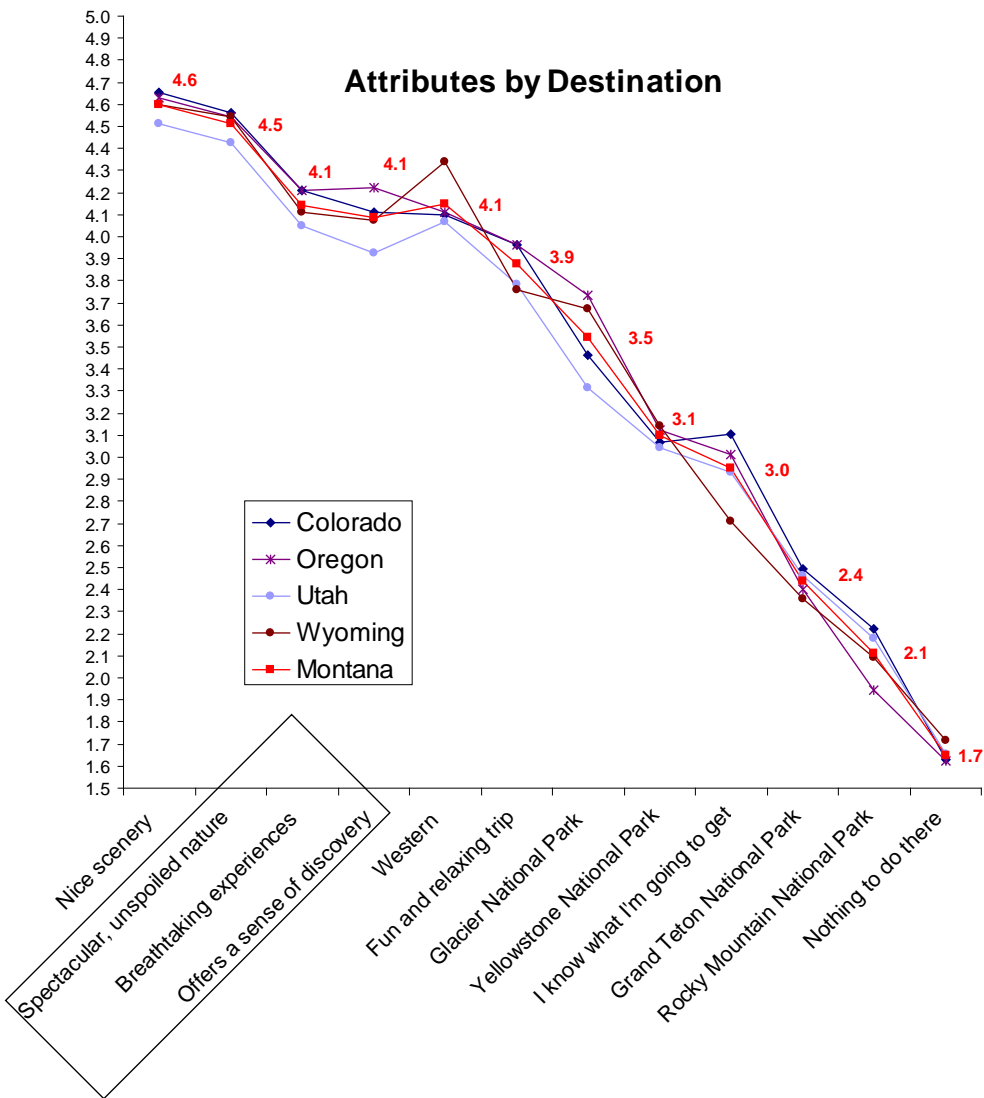
Base = 59 Total Travelers Aware of MT Advertising, 476 Unaware

Sub-segment data provided in tabs: Page 257



# Key attributes also associated with competitive set

Q: Rate each of the following in terms of how much you associate it with Colorado/Oregon/Utah/Wyoming/Montana.



Travelers also associate the key attributes with the main competitive set of destinations.

Base = Varies based on awareness of each Destination



## *Next Steps*



Leisure Trends will conduct the second wave of the Awareness study among core Frugal Experientialists and GeoCore Travelers the week of April 27th. This post-wave will provide measurement against all the objectives of the study:

- Brand and Advertising Awareness, both Unaided and Aided.
- Consideration of travelling to Montana in the next 6-18 months and perceptions of what Montana offers to travelers.
- Understanding attributes related to the advertising and the Travel Montana Brand.



*Appendix*



## Frugal Experientialists

- More interested in the experience than in luxurious travel
- Strong (second only to Active Geotourists) on Geotourist attitudes, tested attributes and brand positioning
- More likely to listen to radio or watch PBS
- Average age: 48
- Largest income range: \$100-149k

## GeoCores

- Most active on vacation - outdoor activities, cultural activities, national parks/monuments
- Rate a place that feels comfortable high on their importance list
- Watch nature and travel programs
- Average age: 46
- Average annual income: \$76-99K

## Geo-Traveler Profile

Values and Mindset:

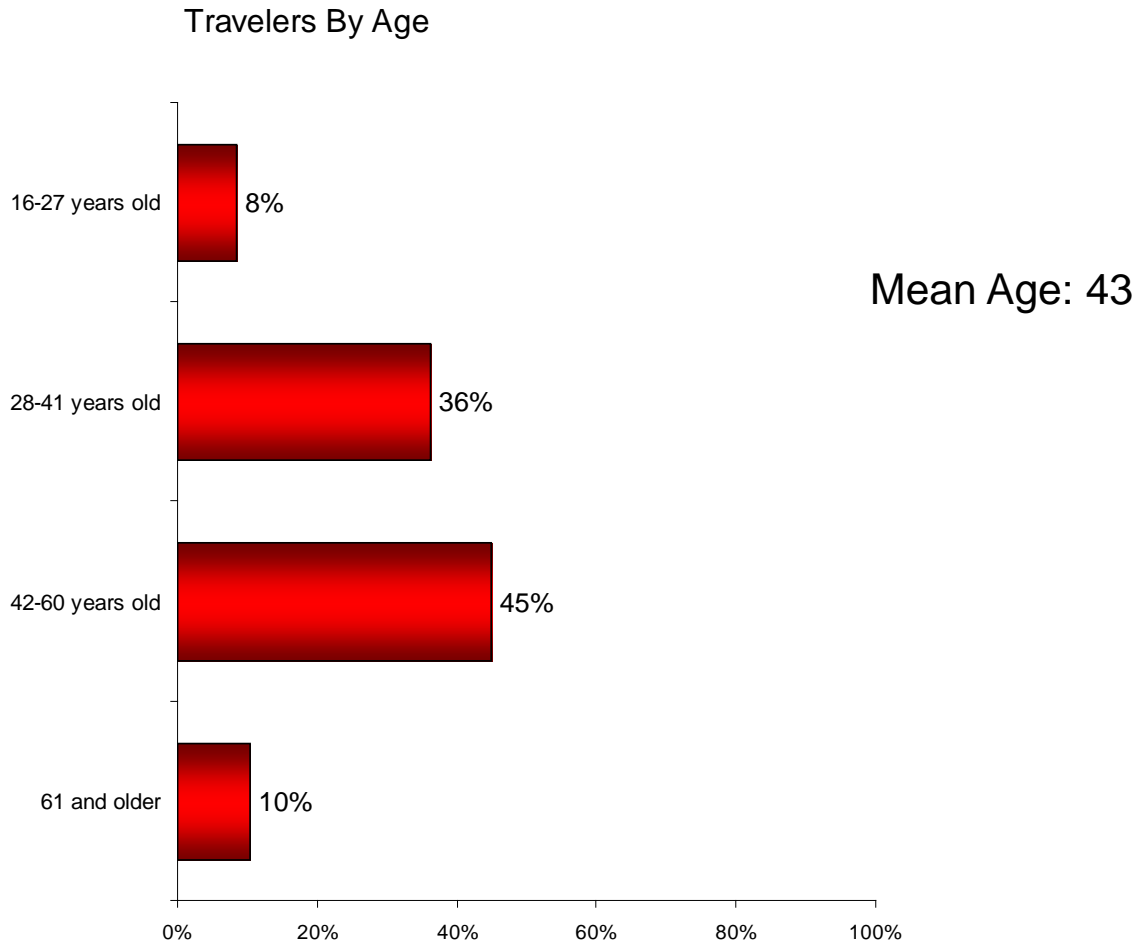
Seek out experiences that make their world bigger  
Fighting against the homogenization of experience  
Motivated by what makes one place distinct from another  
Global Citizen  
Intellectual Curiosity  
Green Awareness and Green Behaviors



## *Frugal Experientialist & GeoCore Profile*



Q: Which of the following categories includes your age?



Base =718 Total Respondents

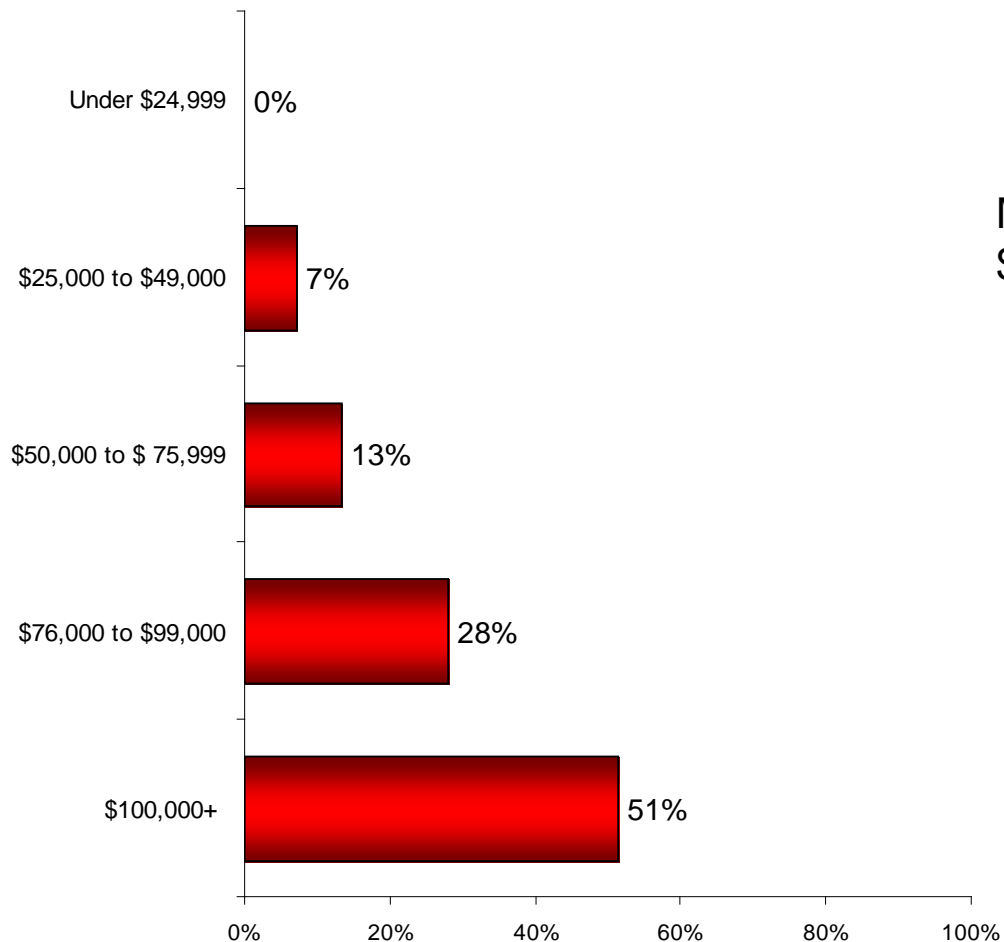
Sub-segment data provided in tabs: Page 265



# Travelers by Household Income

Q: In which of the following groups does your total household income fall?

## Travelers By Income



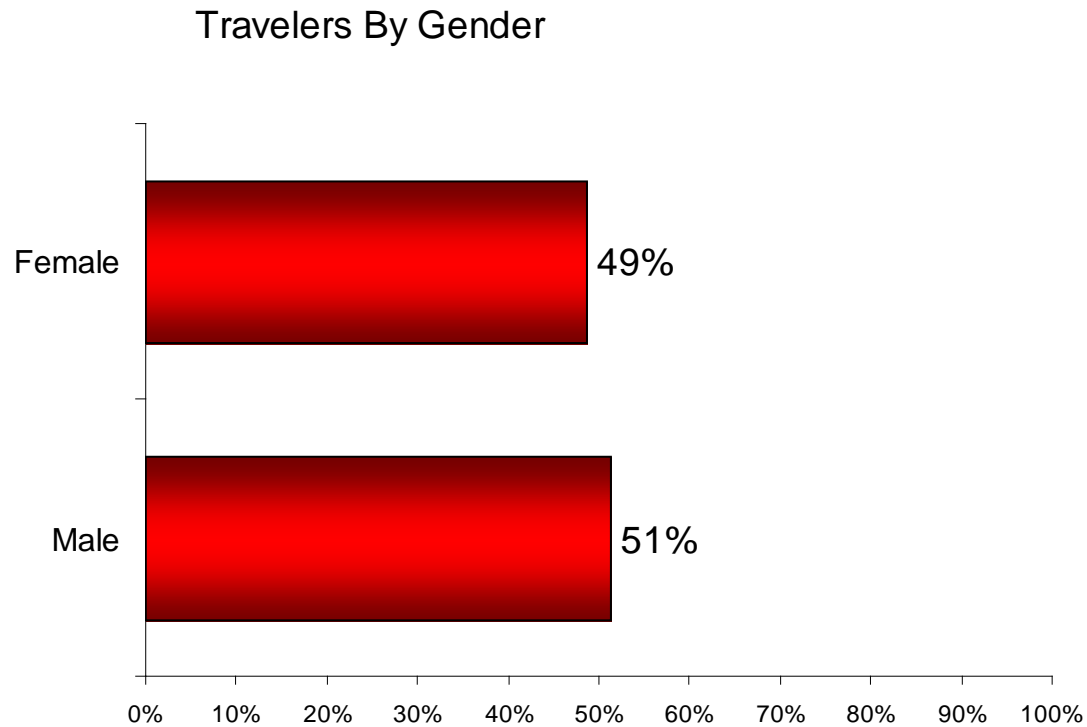
Mean Household Income:  
\$81,530

Base =670 Total Respondents

Sub-segment data provided in tabs: Page 266



Q: What is your gender?



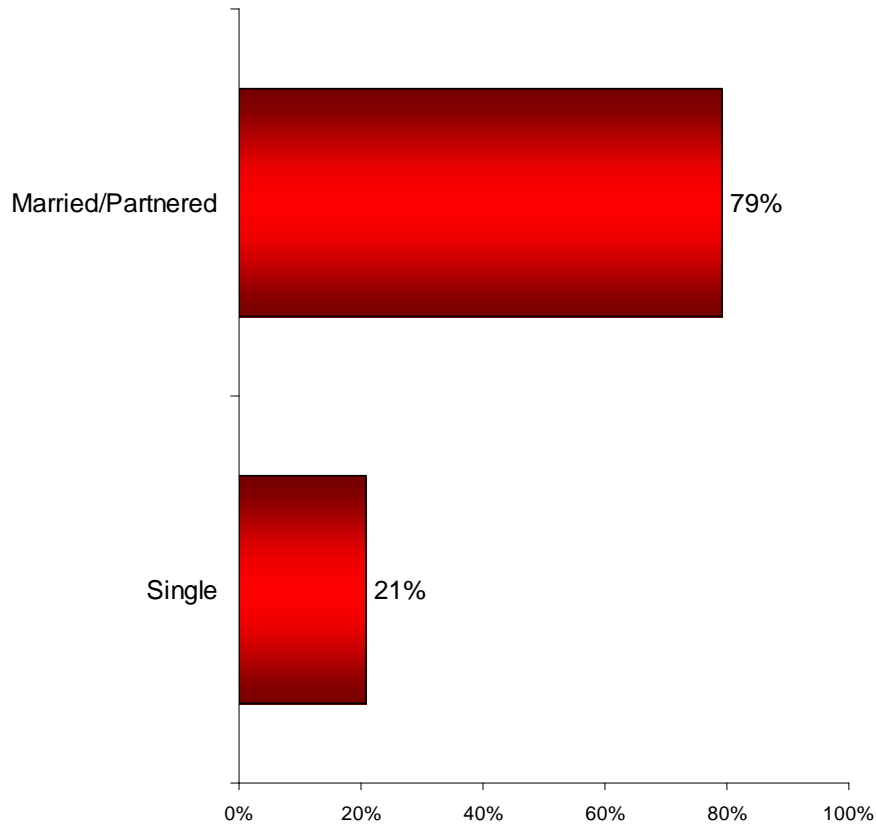
Base = 714 Total Respondents

Sub-segment data provided in tabs: Page 268



Q: What is your marital status?

Travelers By Marital Status



Base =705 Total Respondents

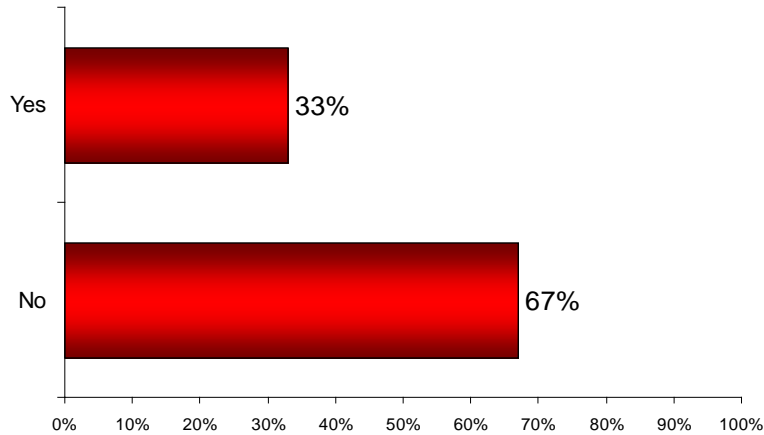
Sub-segment data provided in tabs: Page 277



# Travelers by Number of Children in Household

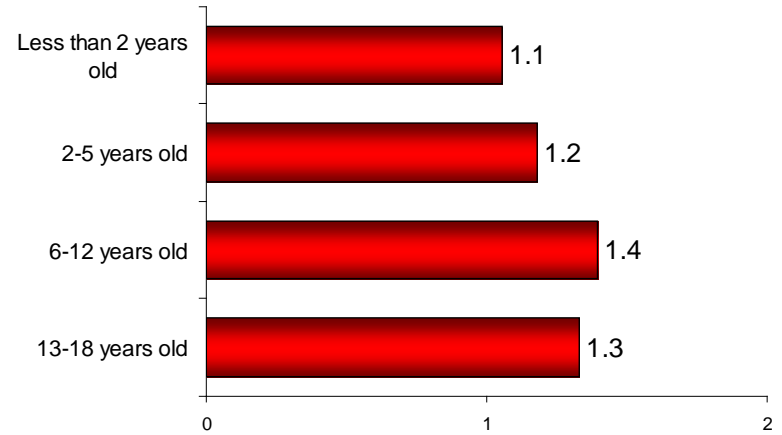
Q: Are there children, under the age of 18 currently living in your household?  
Q: How many children are currently living in your household in the following age ranges?

Travelers With Children in Household



Base =720 Total Respondents

Number of Children in Household By Age



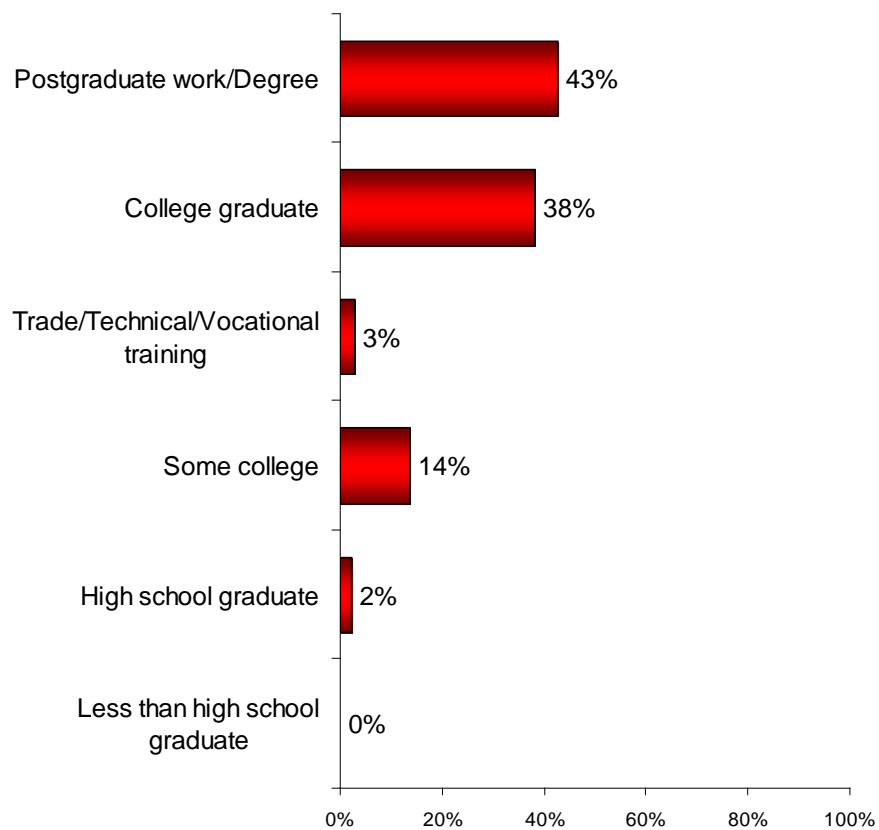
Base =237 Respondents with Children

Sub-segment data provided in tabs: Page 269-274



Q: What is the highest level of education you have completed?

### Travelers By Education



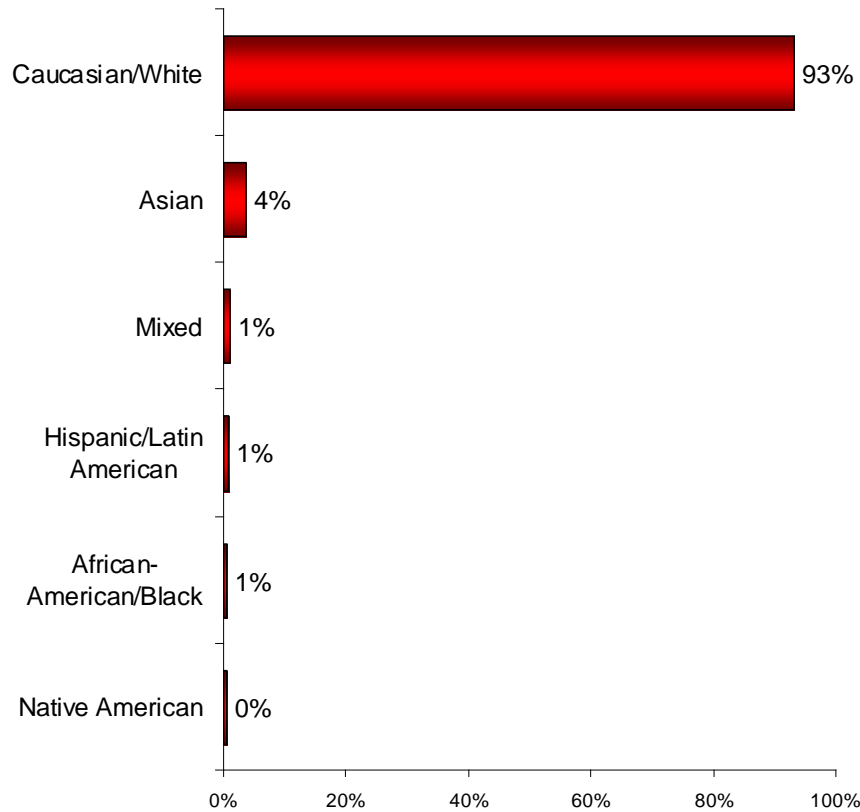
Base =716 Total Respondents

Sub-segment data provided in tabs: Page 278



Q: What is your ethnicity?

Travelers By Ethnicity



Base = 612 Total Respondents

Sub-segment data provided in tabs: Page 275