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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 analyzed in March. This benchmark study was conducted in two planned media markets (Atlanta and Chicago) as well as with a control group of Americans from outside the test markets for comparison.
- The post study was fielded the end of April and the results are explored in this report.

## **Study Objectives**

- Gather pre and post 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.
- Understand the impact of the advertising on Travelers perceptions.



## Methodology

- In wave two, Leisure Trends Group fielded an online study with 640 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.
  - 205 from Atlanta
  - 202 from Chicago
  - 233 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 who qualified were randomly selected to participate in the benchmark survey or 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.



Subgroup analysis is presented where relevant. The subgroups are divided as follows:

- Atlanta W1: Participants in the Wave 1 study who live in the Atlanta, Georgia metro area
  - Atlanta W2: Participants in the Wave 2 study who live in the Atlanta, Georgia metro area
  - Chicago W1: Participants in the Wave 1 study who live in the Chicago, Illinois metro area
  - Chicago W2: Participants in the Wave 2 study who live in the Chicago, Illinois metro area
  - Random US W1: Participants in the Wave 1 study who do not live in Montana, Georgia or Illinois (control group for test markets)
  - Random US W2: Participants in the Wave 2 study who do not live in Montana, Georgia or Illinois (control)
- 

- Gen Y W1: Participants in the Wave 1 study between the ages of 16 and 27
  - Gen Y W2: Participants in the Wave 2 study between the ages of 16 and 27
  - Gen X W1: Participants in the Wave 1 study between the ages of 28 and 41
  - Gen X W2: Participants in the Wave 2 study between the ages of 28 and 41
  - Boomers W1: Participants in the Wave 1 study between the ages of 42 and 60
  - Boomers W2: Participants in the Wave 2 study between the ages of 42 and 60
  - Eisenhower Generation W1: Participants in the Wave 1 study 61 years of age and older
  - Eisenhower Generation W2: Participants in the Wave 2 study 61 years of age and older
- 

- Aware MT: Those who were aware of Montana in Wave 2 as a travel destination, unaided or aided
- Unaware MT: Those who were unaware of Montana in Wave 2 as a travel destination, unaided or aided
- Ad Aware: Those who were aware of Montana advertising in Wave 2, unaided or aided
- Ad Unaware: Those who were unaware of Montana advertising in Wave 2, unaided or aided



# *Executive Summary*



- Unaided advertising awareness for Montana rises significantly in both test markets to 10% in Atlanta and 5% in Chicago from just 1% in Wave One.
- Aided advertising awareness increases significantly in Atlanta from 6% in wave one to 16% in wave two.
- Eleven percent of Travelers recall billboard advertising specifically, and 6% describe the Bear ad in some detail.
  - *“There are several billboards around Atlanta. They all provide beautiful views of landscapes and look very inviting for people who want to get away from the city.”*
  - *“Billboard for visitmt.com with a grizzly walking down the middle of the road with a tagline of ‘rush hour in Montana’.”*
- Those aware of Montana’s advertising in wave two continue to believe Montana offers outdoor activities, beautiful scenery and wide open spaces in wave two, with new mentions including “variety”, “big sky country” and “rugged”.
  - The number of Travelers in wave two who believe Montana offers few people or big cities significantly increases from wave one.
  - Historical mentions significantly decrease from wave one.
  - *“Beautiful, non trashed, underexplored place.”*
  - *“Escape, nature, beauty, friendly locals, rugged terrain.”*
- In wave two those who are aware of Montana’s advertising (20%) are significantly more likely to say they know the state very well than those unaware of the advertising (10%).



## Headlines (Continued)

- The number of respondents familiar with Montana who mention “sky” or “big sky country” significantly increased from wave one to wave two in Atlanta (10% vs. 27%) and Chicago (13% vs. 26%).
- Billboards emerge as a likely place for Travelers to have seen the advertising with 22% selecting this response in wave two compared to 0% in wave one.
- Travelers who are aware of Montana advertising in wave two are significantly more likely to associate Montana with the key attributes “Spectacular, unspoiled nature” “Breathtaking experiences” and “Offers a sense of discovery” than those unaware of the advertising.
- In Atlanta, those aware of Montana advertising in wave two (31%) are significantly more likely to plan to travel to the state than those unaware of the advertising (12%).
- The number of total Travelers citing their love for Montana as a reason to travel to the state significantly increased in wave two (18%) over wave one (5%).
- In both media markets, advertising rises significantly between waves as a source of information for Travelers when becoming aware of Montana from 16% to 36% in Atlanta and from 20% to 42% in Chicago.



## FINDINGS

- Unaided advertising awareness rises significantly in both media markets.
- Awareness of the advertising leads to an increase in plans to travel to Montana.
- Advertising also increases as a source of information for Travelers becoming aware of Montana.
- The advertising is delivering strongly on the key benefits of Montana and is increasing the affection travelers have for the state.

- Billboards and the Bear ad are registering strongly.

- Friends and family are still the top sources of information for travel destinations.

## OPPORTUNITIES

- The current advertising campaign is having a strong impact in spite of the economy causing many Americans to downsize their travel plans.
- LTG recommends continuing the current campaign and utilizing the same creative strategy going forward with new executions.
- LTG recommends increasing exposure to the advertising to continue and improve the impact being felt.

- LTG recommends continuing with this media placement in the future.

- Capitalizing on this word of mouth referral system through social media is critical.



# *Detailed Findings*



# ***Brand Awareness & Perceptions***

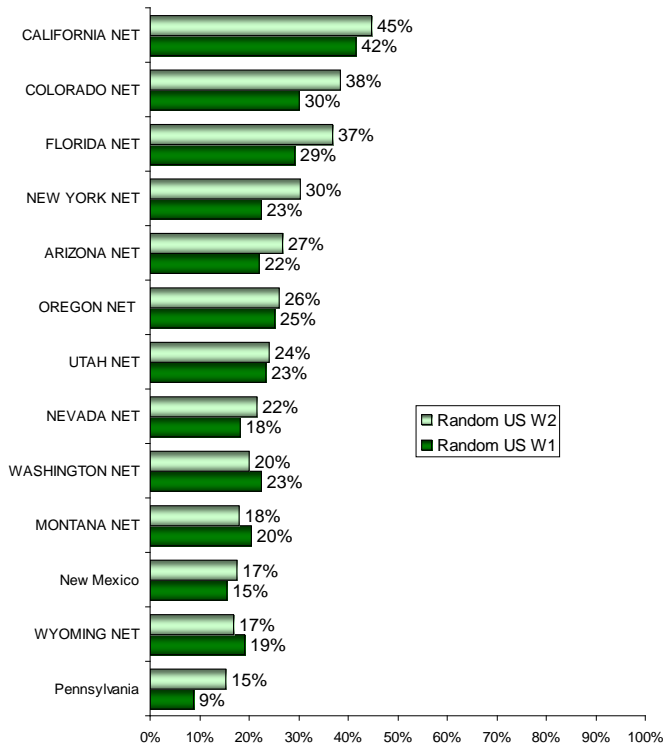


# Montana's Unaided Awareness Holds Steady

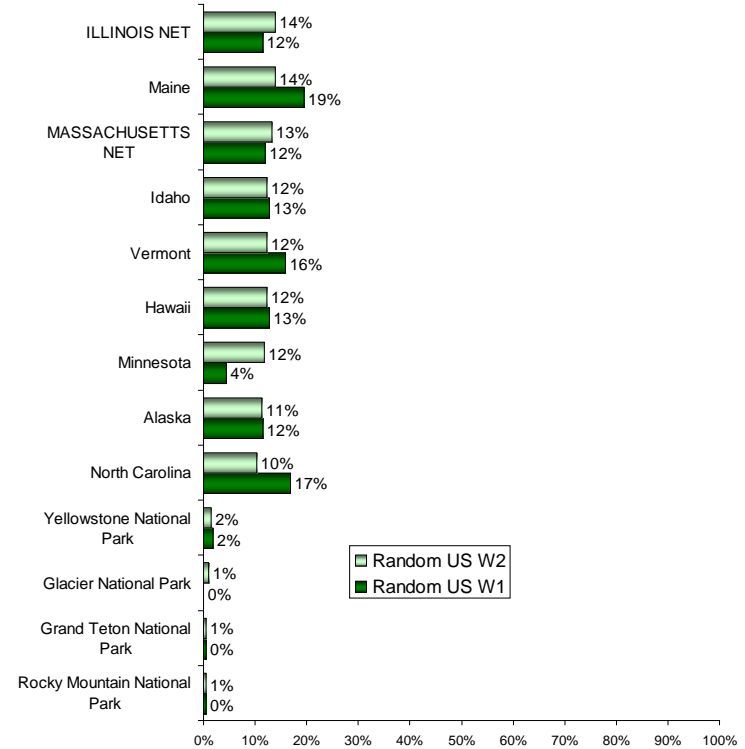
Q: Thinking about all of the destinations within the United States, but outside your home state available for you to chose from for these non-business trips, please list all of the states that come to mind?

Montana's overall unaided awareness holds steady and is the 10<sup>th</sup> most mentioned destination.

Unaided Brand Awareness  
Random US: Top 13\*



Unaided Brand Awareness  
Random US: Next 13\*



\*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 10% awareness for the Random US population in W2 not shown, with the exception of the parks.

Base = Random US Respondents: 226 W1, 195 W2

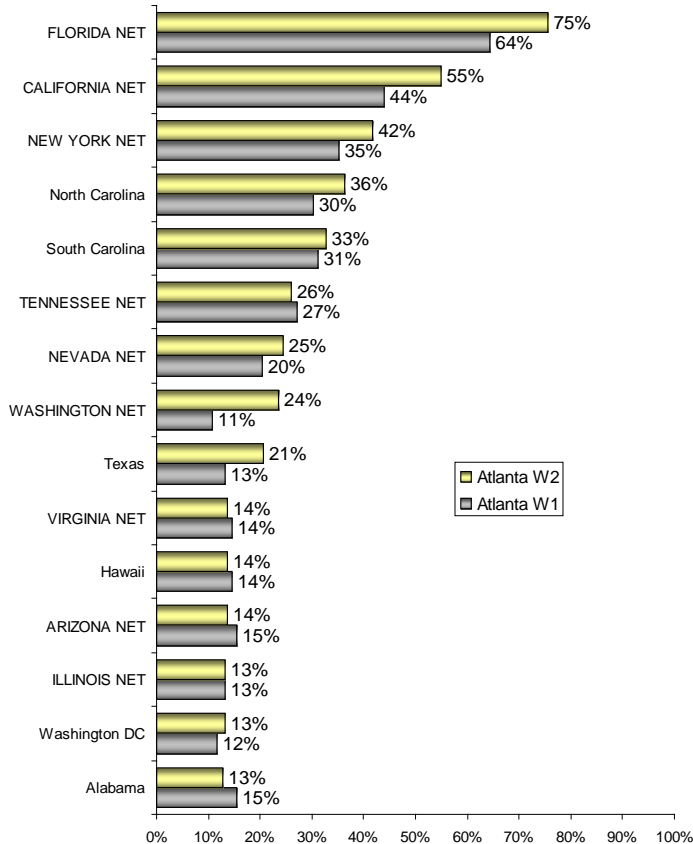


# Atlanta's Unaided Awareness Holds Steady

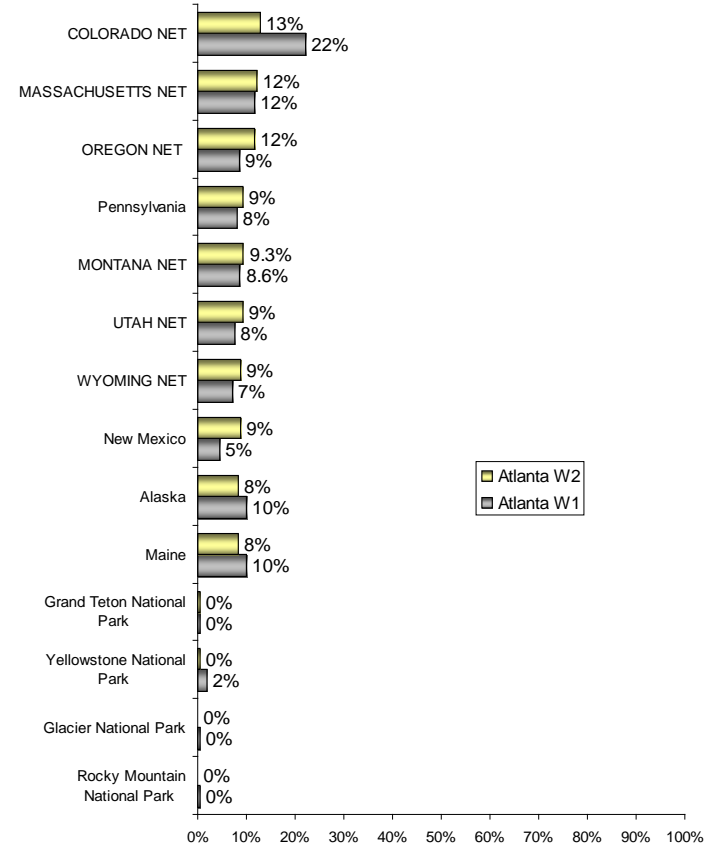
Q: Thinking about all of the destinations within the United States, but outside your home state available for you to chose from for these non-business trips, please list all of the states that come to mind?

In Atlanta, unaided awareness of Montana shifts directionally upward with 9.3% aware in wave two.

Unaided Brand Awareness  
Atlanta: Top 15\*



Unaided Brand Awareness  
Atlanta: Next 14\*



Base = Atlanta Respondents: 221 W1, 204 W2

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\*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 8% awareness for the Atlanta population in W2 not shown, with the exception of the parks.

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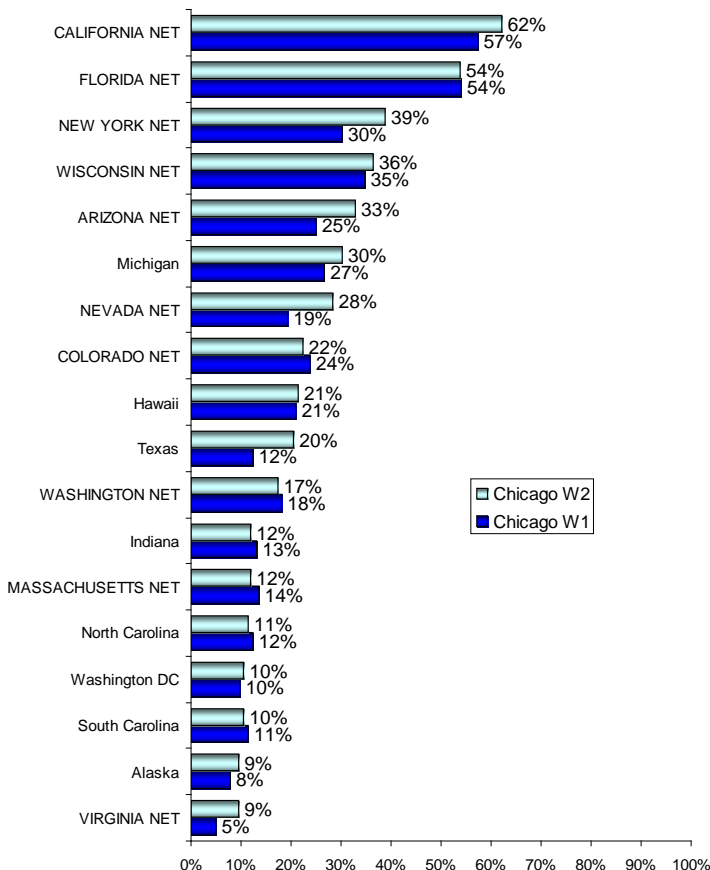


# Chicago's Unaided Awareness Holds Steady

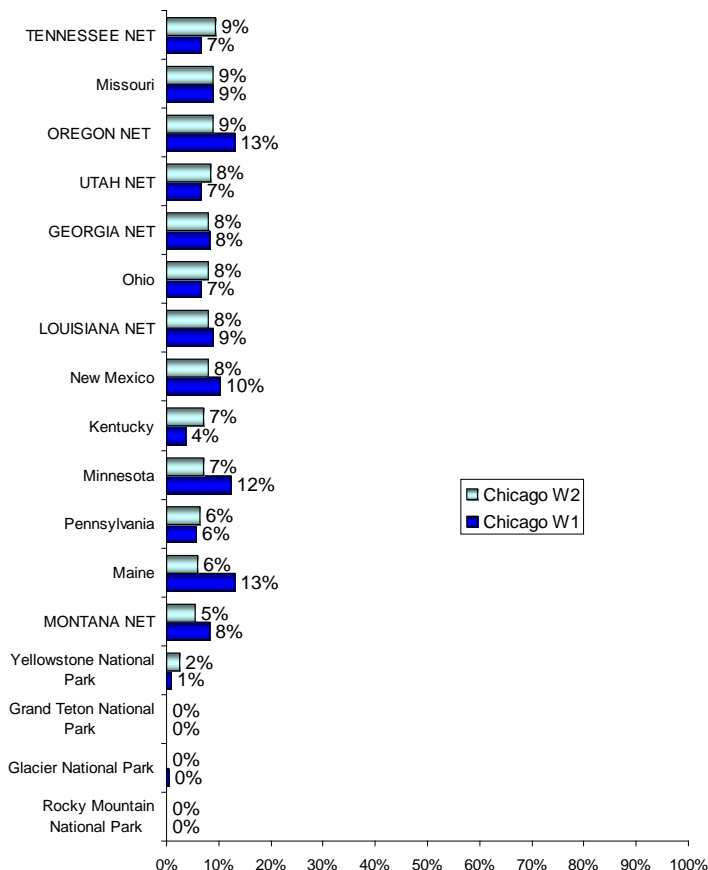
Q: Thinking about all of the destinations within the United States, but outside your home state available for you to chose from for these non-business trips, please list all of the states that come to mind?

Montana's unaided awareness in the Chicago market shifts directionally downward though not significantly. Yellowstone National Park awareness shifts upward slightly.

Unaided Brand Awareness  
Chicago: Top 18\*



Unaided Brand Awareness  
Chicago: Next 17\*



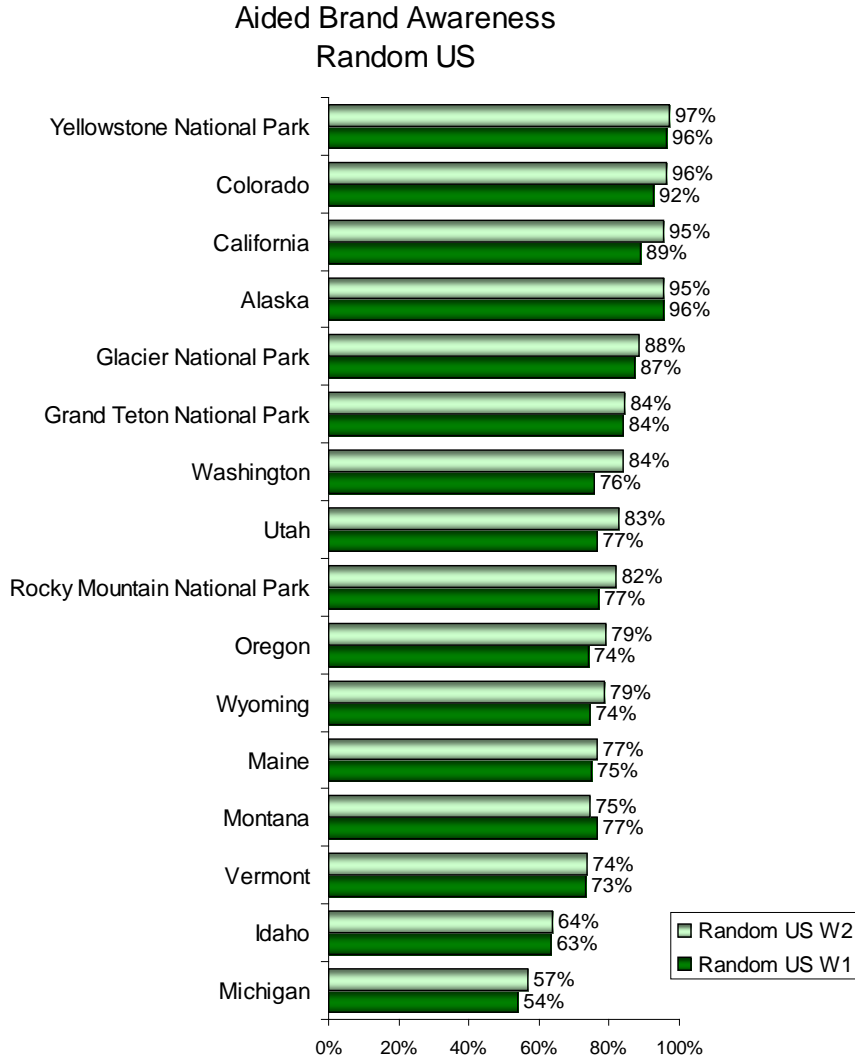
Base = Chicago Respondents: 244 W1, 201 W2

\*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 5% awareness for the Chicago population in W2 not shown, with the exception of the parks.



# Aided Brand Awareness Stable

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



Montana's aided brand awareness shifts directionally downward in the control market, while the National Parks retain their lead.

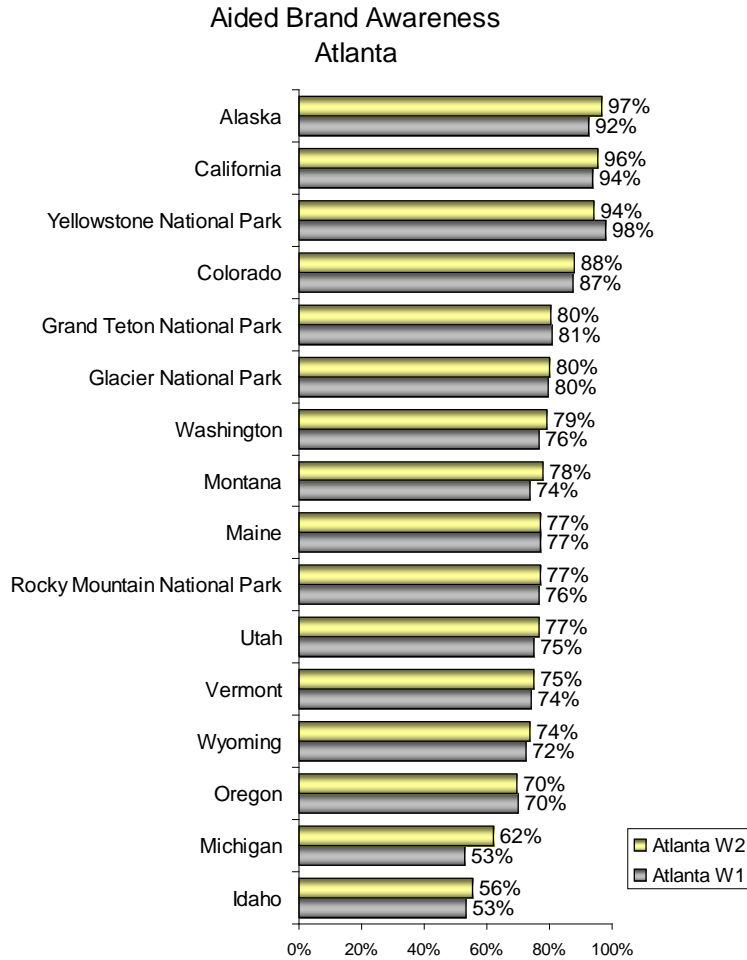
Base = Random US Respondents: 226 W1, 197 W2



# Aided Brand Awareness Stable

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

Montana's aided brand awareness shifts directionally upward in Atlanta to 78% awareness.



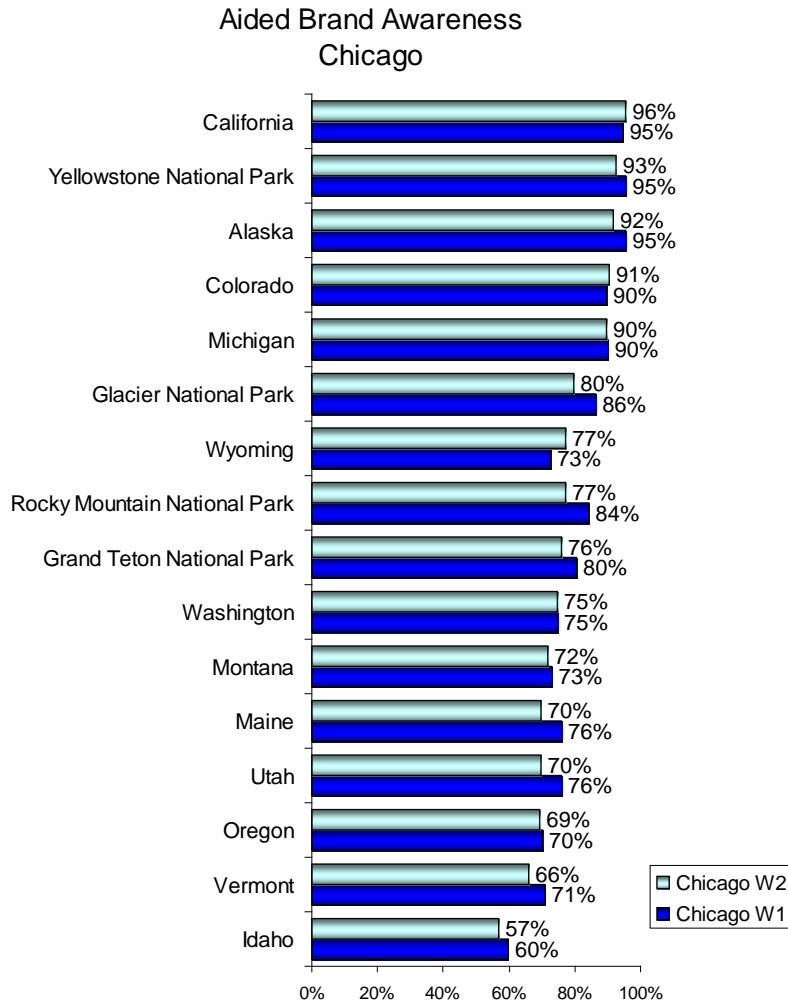
Base = Atlanta Respondents: 221 W1, 205 W2



# Aided Brand Awareness Stable

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

Montana's aided brand awareness remains stable in Chicago.



Base = Chicago Respondents: 244 W1, 202 W2

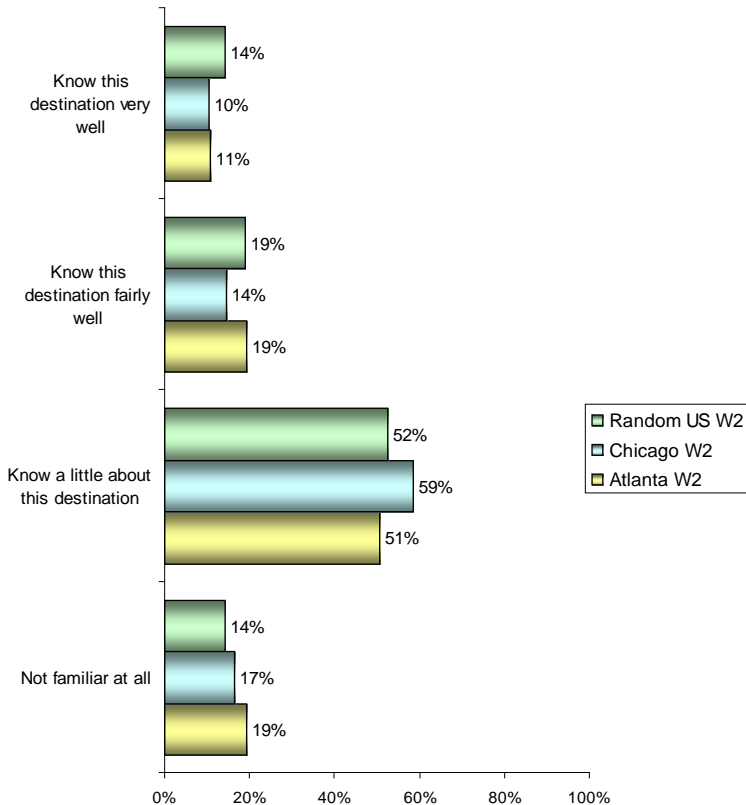


# Majority familiar with Montana

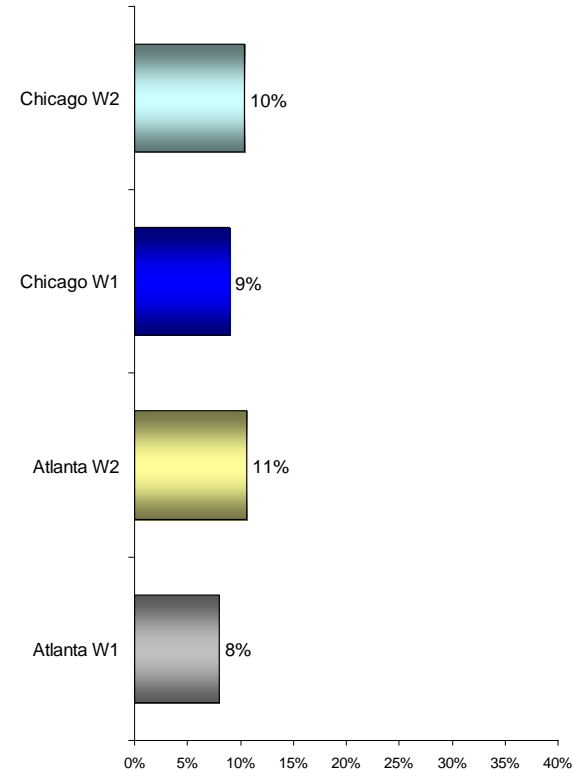
Q: How familiar are you with the following destinations?

The number of respondents who felt they were very familiar with Montana shifts directionally upward between waves.

### Familiarity with Montana Wave Two



### Know Montana Very Well



Base = W2: 147 Random US, 145 Chicago, 160 Atlanta Respondents Aware MT

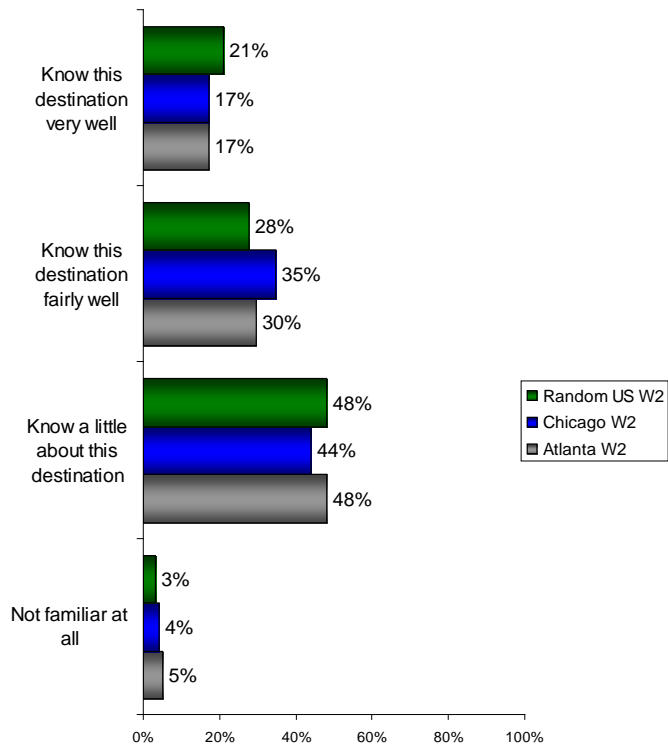


# Yellowstone National Park familiarity stable

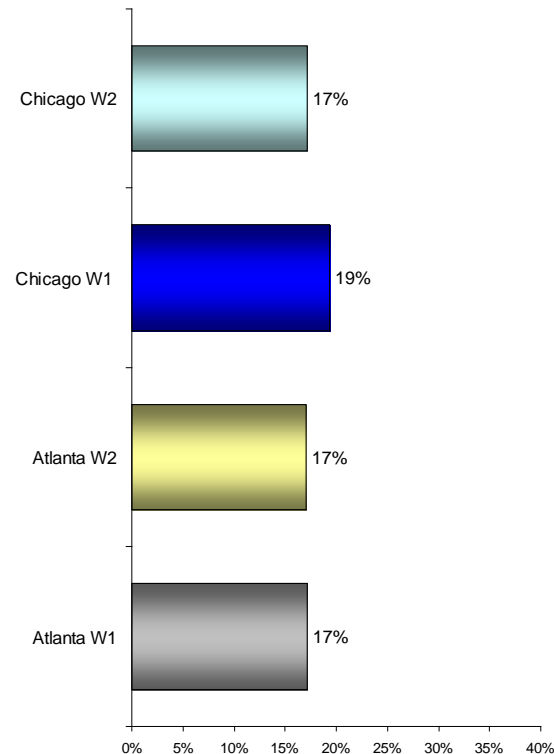
Q: How familiar are you with the following destinations?

The number of respondents who felt they were very familiar with Yellowstone National Park remains stable between waves.

### Familiarity with Yellowstone National Park Wave Two



### Know Yellowstone National Park Very Well



Base = W2: 191 Random US, 187 Chicago, 193 Atlanta Respondents Aware YNP

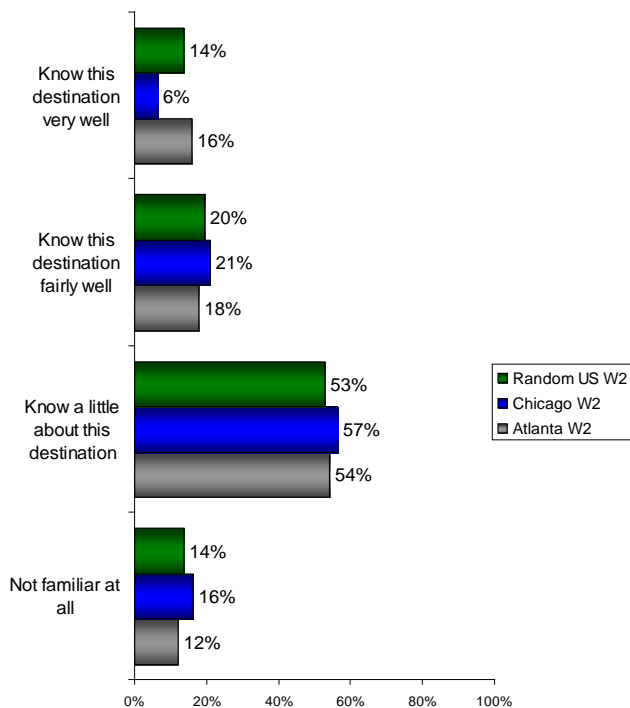


# Small shift in Glacier National Park familiarity

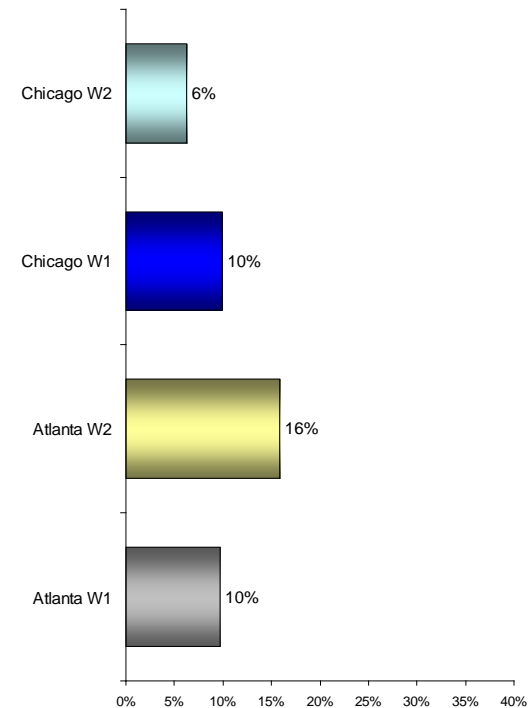
Q: How familiar are you with the following destinations?

The number of respondents who felt they were very familiar with Glacier National Park shifts directionally upward in Atlanta.

Familiarity with Glacier National Park  
Wave Two



Know Glacier National Park Very Well



Base = W2: 174 Random US, 161 Chicago, 164 Atlanta Respondents Aware GNP

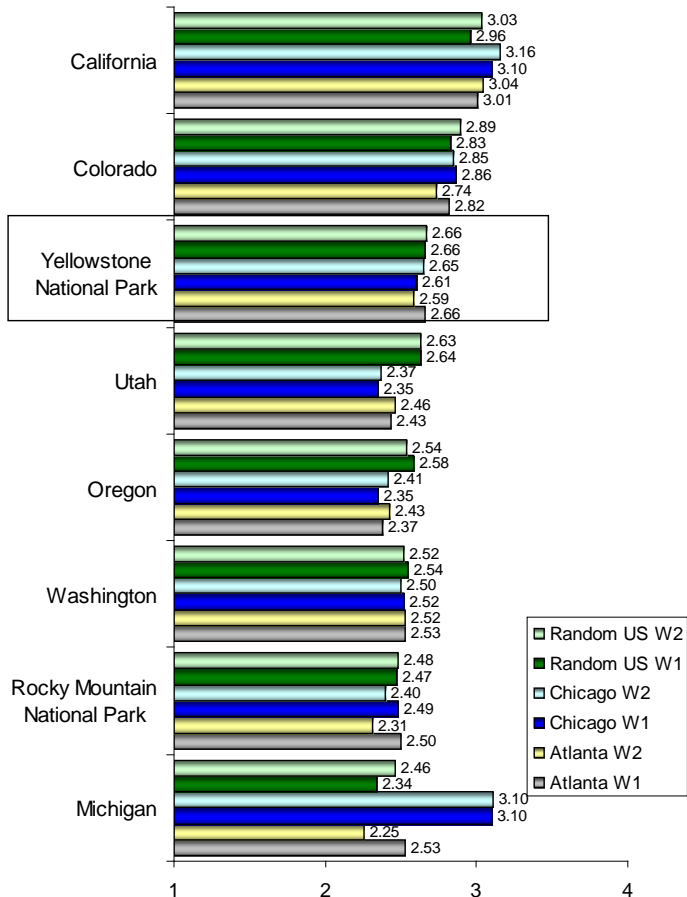


# Familiarity for all destinations stable

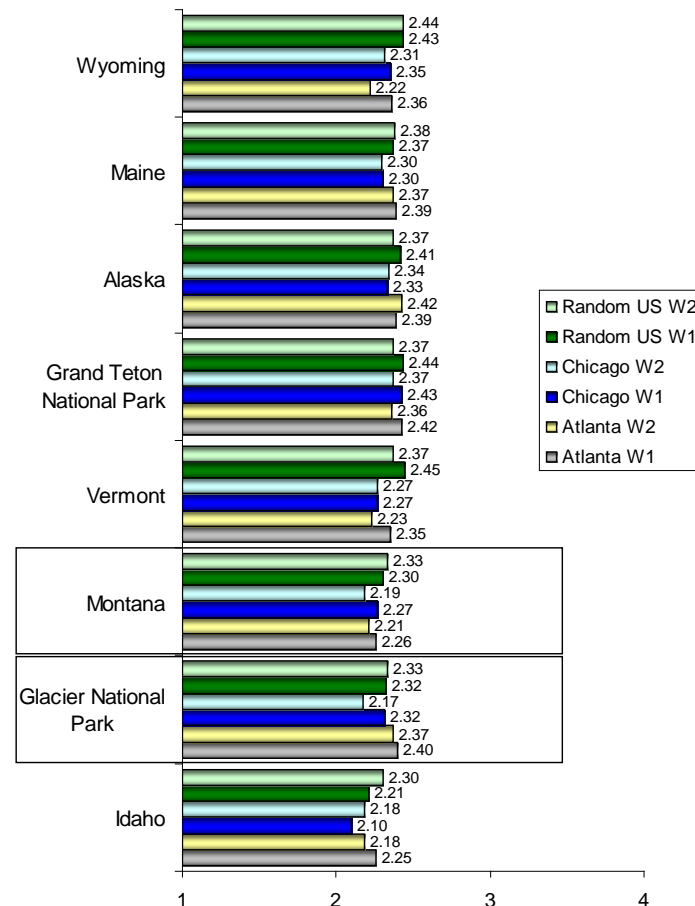
Q: How familiar are you with the following destinations?

There is little movement in overall familiarity with the various destinations between waves.

Familiarity with All Destinations  
Top 8  
Mean Score



Familiarity with All Destinations  
Next 8  
Mean Score



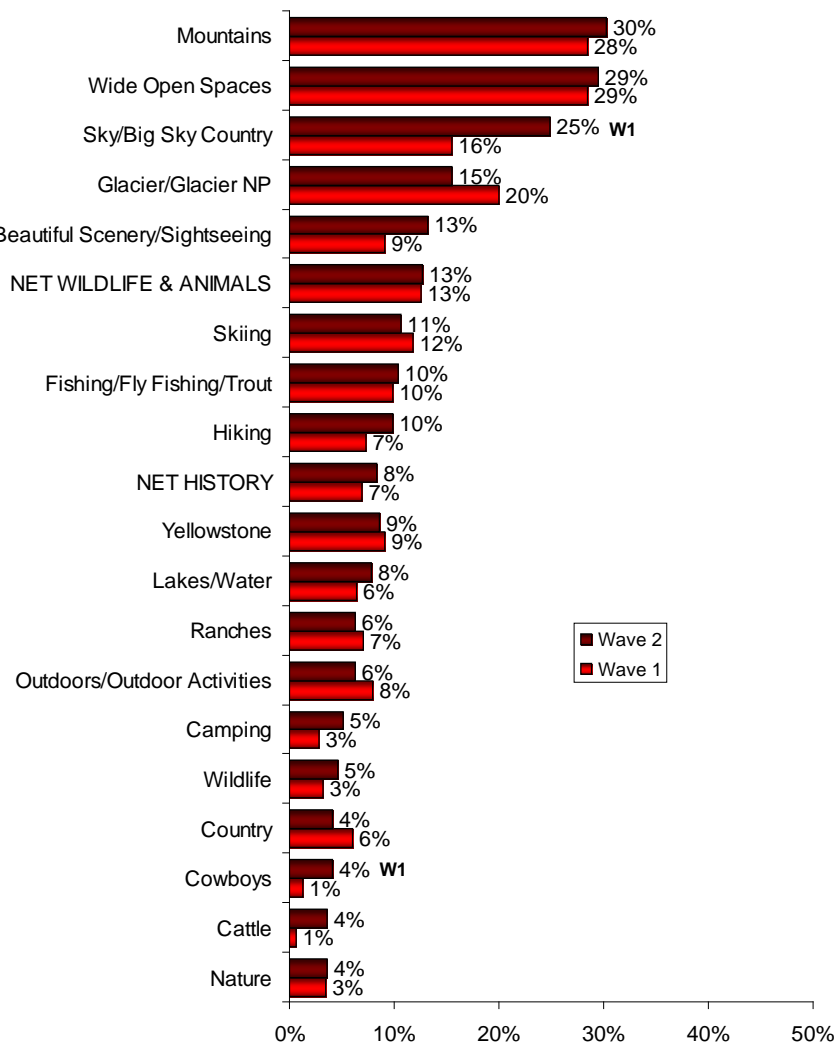
Base = Varies based on awareness



# Montana = big sky country

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 20



The number of respondents familiar with Montana who mention “sky” or “big sky country” increased significantly from wave one to wave two to 25% total. This metric increased significantly in both test markets, in Atlanta (10% vs. 27%) and Chicago (13% vs. 26%).

- The Chicago market shows some significant differences in what respondents mention. Fewer respondents in wave two (11%) mention Glaciers or Glacier National Park than did so in wave one (24%). Fly fishing also decreased significantly from 10% to 3%

### Traveler Comments Wave Two:

- *“Big Sky, Big Skiing, Big mountains, Big game animals.”*
- *“Big Sky Country...Rockies to the west, Continental Divide through it, Nature at it's best.”*
- *“Big sky and the last best place.”*
- *“Beautiful scenery, wide open spaces, few people there, mountains, clear rivers, big sky country, skiing.”*

Base = Travelers Familiar with Montana: 464 W1, 394 W2

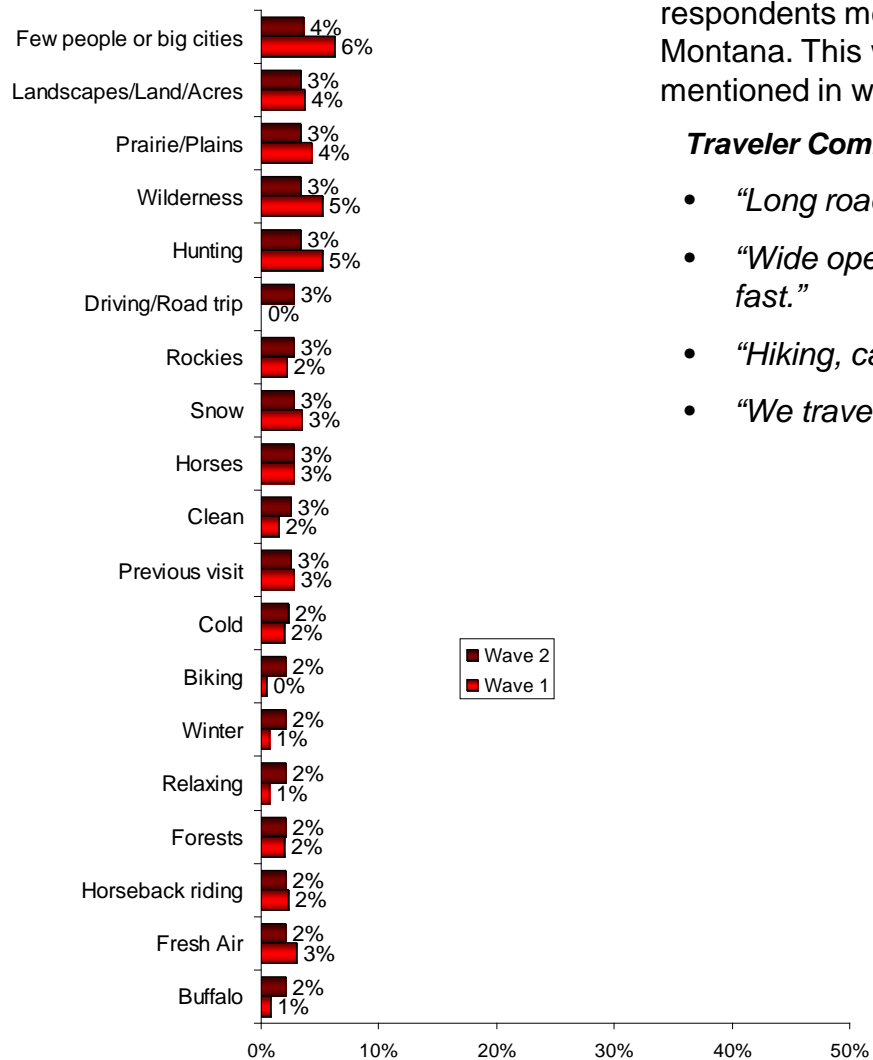
Significant differences in results between waves have been reported at a 95% confidence level.



# Driving and road trips emerge

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  
Next 19



In wave two, a new category of responses emerges with three percent of respondents mentioning driving long distances or associating road trips with Montana. This was most prominent in the Atlanta market (6% of respondents mentioned in wave two).

### Traveler Comments Wave Two:

- *“Long roads for biking, bison, skiing, hiking.”*
- *“Wide open spaces great for camping, fishing, hunting, and driving very fast.”*
- *“Hiking, camping, driving.”*
- *“We traveled there on a cross country trip Sept. 2008.”*

Base = Travelers Familiar with Montana: 464 W1, 394 W2



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

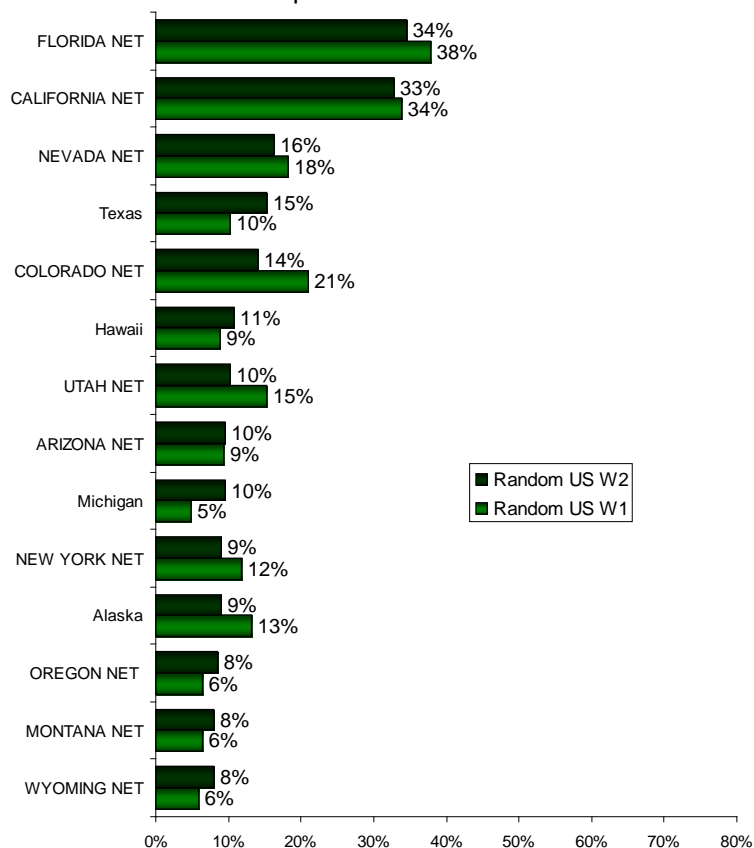


# Montana thirteenth in unaided advertising awareness

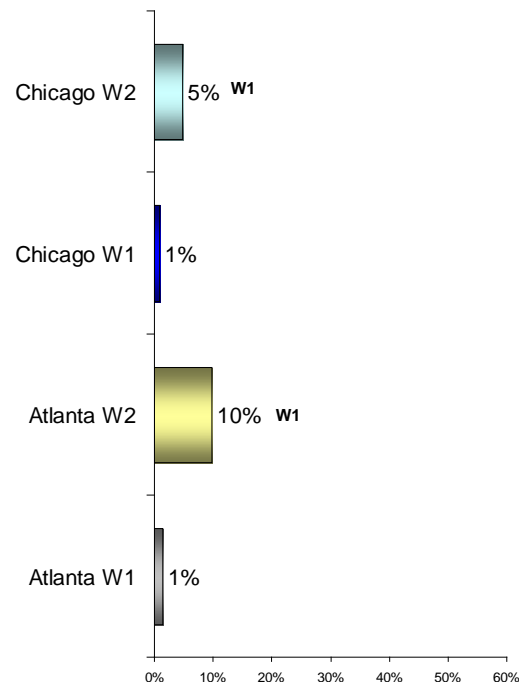
Q: What state other than your home state have you seen or heard advertising for in the past three months or so?

Unaided awareness of Montana's advertising increases significantly in both test markets.

### Unaided Advertising Awareness Random US: Top 14\*



### Montana NET Unaided Advertising Awareness



Significant differences in results between waves have been reported at a 95% confidence level.

\*NET includes mentions of specific cities or parks/attractions within that state. Destinations with lower than 8% awareness for the Random US population not shown.

Base = Random US Respondents: 204 W1, 177 W2, Chicago: 235 W1, 189 W2, Atlanta: 203 W1, 195 W2

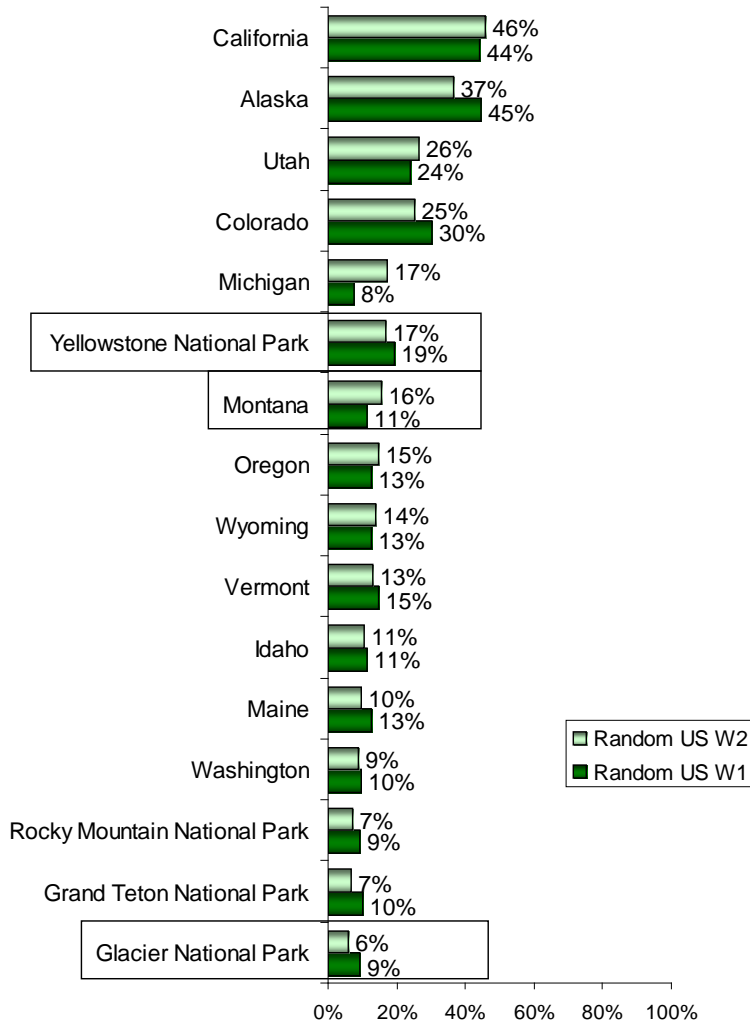


# Sixteen percent aware of Montana advertising when aided

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.

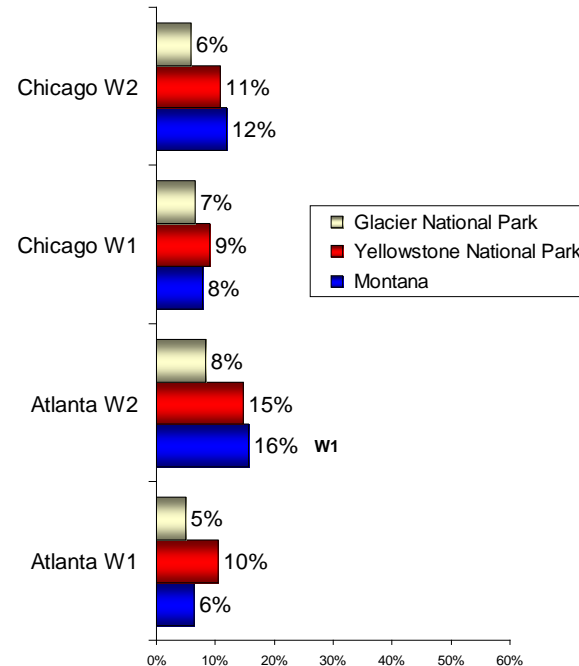
## Aided Advertising Awareness

### Random US



Sixteen percent of Travelers are aware of Montana's advertising, a directional shift upward from wave one. In wave two 16% percent of Travelers in Atlanta are aware of Montana's advertising, a significant increase from 6% in wave one.

## Aided Advertising Awareness Wave Comparison



Base = Random US Respondents: 226 W1, 197 W2, Chicago: 244 W1, 202 W2, Atlanta: 221 W1, 204 W2

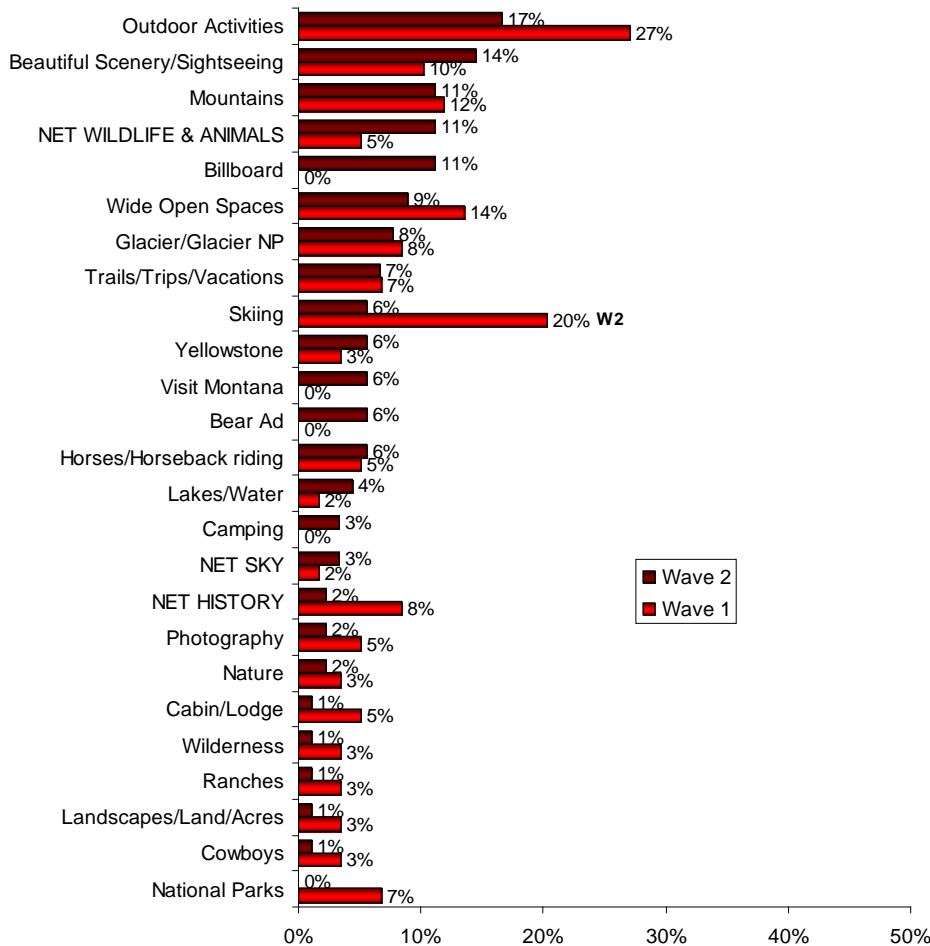
Significant differences in results between waves have been reported at a 95% confidence level.



# Billboards and Bear ad remembered specifically

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

### Montana Advertising Recall



Eleven percent of Travelers who are aware of Montana’s advertising in wave two recall billboards specifically, and 6% describe the Bear ad in some detail.

Shifts noted from wave one to wave two include a significant decrease in skiing, and directional shifts upward in beautiful scenery and Yellowstone National Park. Fewer people mentioned outdoor activities in wave two, though not a significant decrease.

### Traveler Comments Wave Two

- “There are several billboards around Atlanta. They all provide beautiful views of landscapes and look very inviting for people who want to get away from the city.”
- “Billboard at a Chicago train depot.”
- “Bill board for Montana w/ a picture of Glacier.”
- “Generic “Visit Montana” Billboard.”
- “Billboard for visitmt.com with a grizzly walking down the middle of the road with a tagline of ‘rush hour in Montana’.”
- “Billboards showing bear walking down road and scenery.”
- “I saw a billboard with a bear walking down a road.”
- “I saw couple billboards showing a bear walking on the street.”

Base = Travelers Aware of Montana’s Advertising: 59 W1, 90 W2

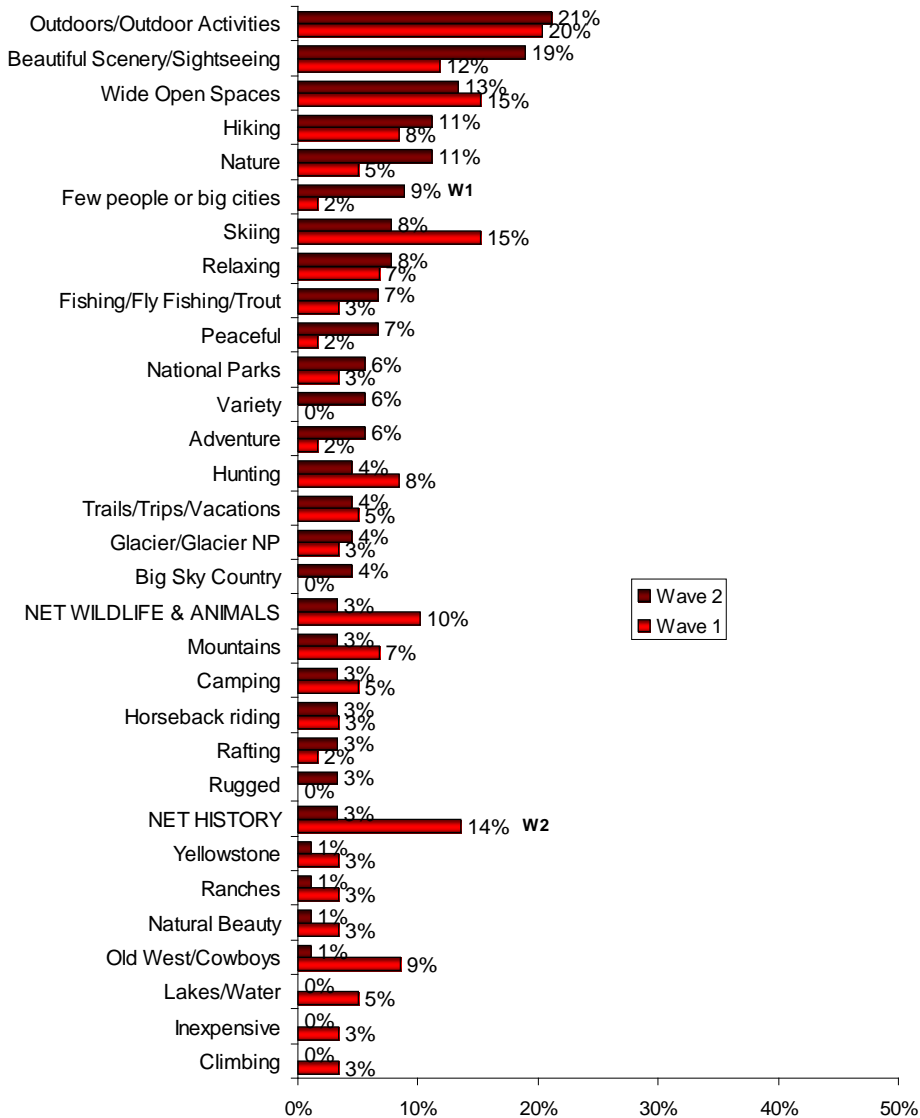
Significant differences in results between waves have been reported at a 95% confidence level.



# 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 continue to believe Montana offers outdoor activities, beautiful scenery and wide open spaces in wave two. New mentions in wave two include variety, big sky country and rugged.

The number of Travelers in wave two who believe Montana offers few people or big cities significantly increases from wave one. Historical mentions significantly decrease from wave one. Adventure, nature and peaceful all shift directionally upward, while skiing and wildlife shift downward.

## Traveler Comments Wave Two

- "From Yellowstone to Big Sky Country to Helena (it's history with gold) and to Glacier National Park, there's a lot to do and see in Montana."
- "Wide variety of western-type/cowboy activities, skiing and nature (hiking, beautiful mountains)."
- "Escape, nature, beauty, friendly locals, rugged terrain."
- "Beautiful, non trashed, underexplored place. Dude ranches for riding, hiking, fishing, etc."
- "Beautiful wide open spaces with few people."

Significant differences in results between waves have been reported at a 95% confidence level.

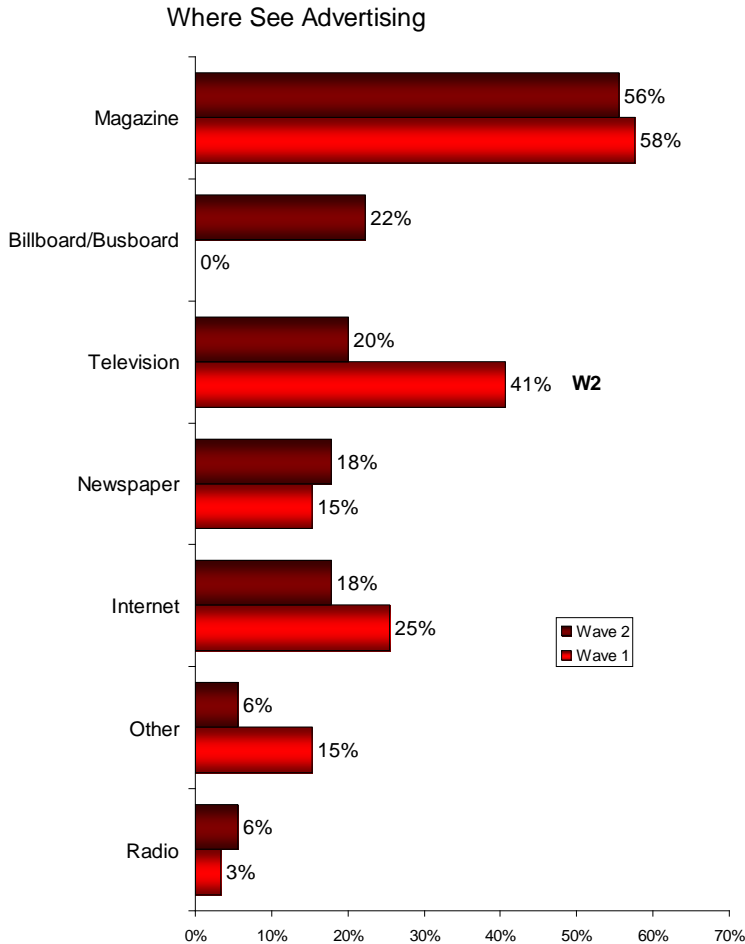
Base = Travelers Aware of Montana's Advertising: 59 W1, 90 W2

NET HISTORY sum of Old West/Cowboys & Historic Sites.



# Billboards emerge as source for advertising

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



While the majority (56%) of Travelers who viewed the advertising recall seeing it in magazines, in wave two 22% noted the advertising on billboards. Just 20% recalled seeing it on television, a significant decrease from wave one.

Base = Travelers Aware of Montana's Advertising: 59 W1, 90 W2

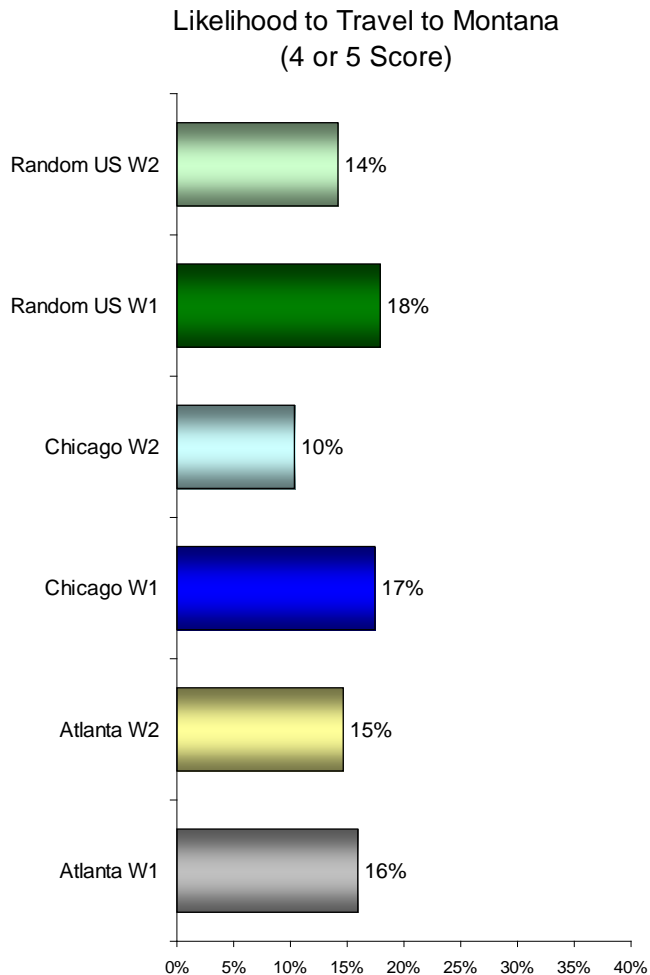


## ***Travel Consideration & Process***



# Economy downsizes plans to travel

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



- While 18% of Travelers (combining 4 and 5 score) in the control group planned to travel to Montana in the next 18 months during wave one, just 14% are planning a trip to the state in wave two.
- Atlanta shows the smallest drop in intention to travel to Montana.
- Those who are familiar with Montana in wave two (35%) are significantly more likely to plan to travel to the state than those not familiar (8%).

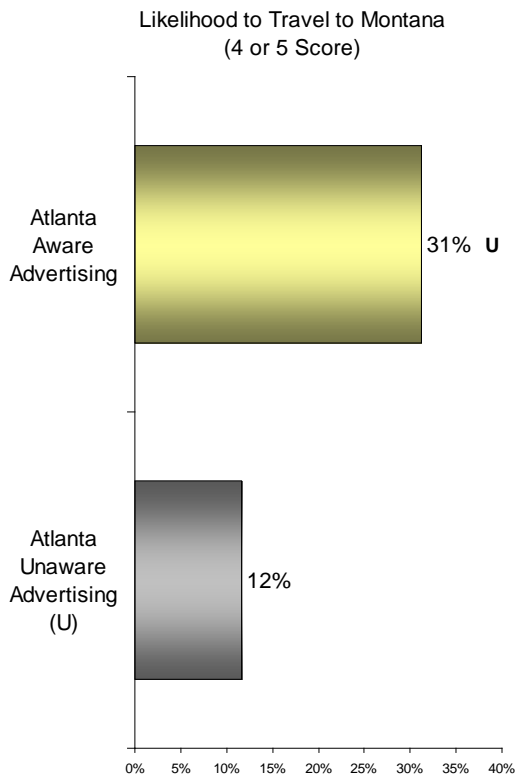
Base = Random US Respondents: 224 W1, 197 W2, Chicago: 244 W1, 202 W2, Atlanta: 220 W1, 204 W2



# Advertising increases likelihood to travel to Montana

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

- In Atlanta, those aware of Montana advertising in wave two (31%) are significantly more likely to plan to travel to the state than those unaware of the advertising (12%).



Base = Atlanta: 220 W1, 204 W2

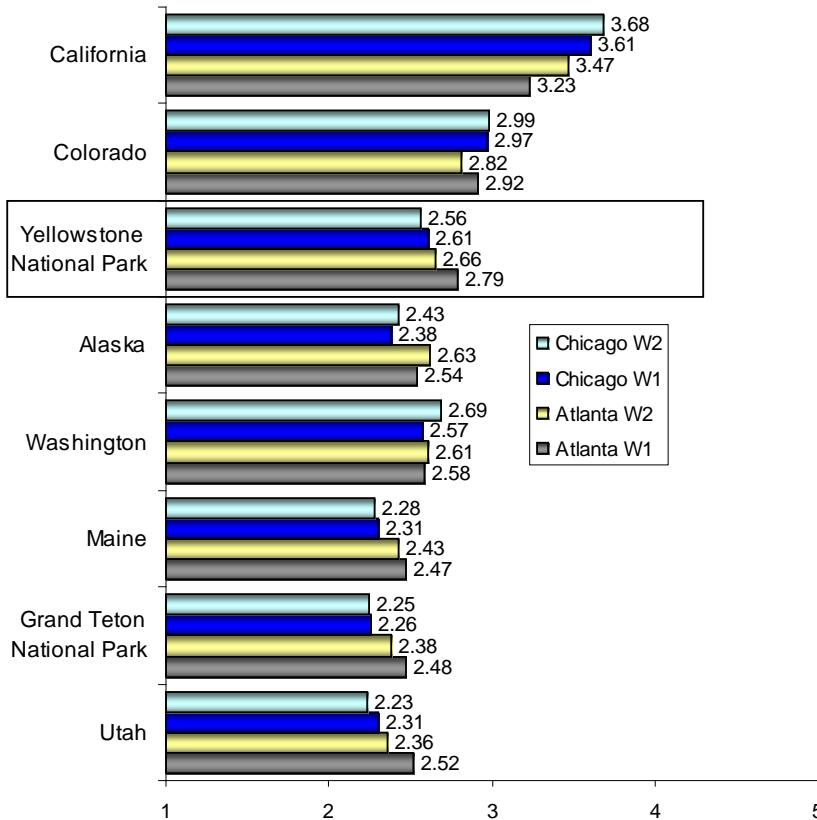


# California one of few states to increase travel likelihood

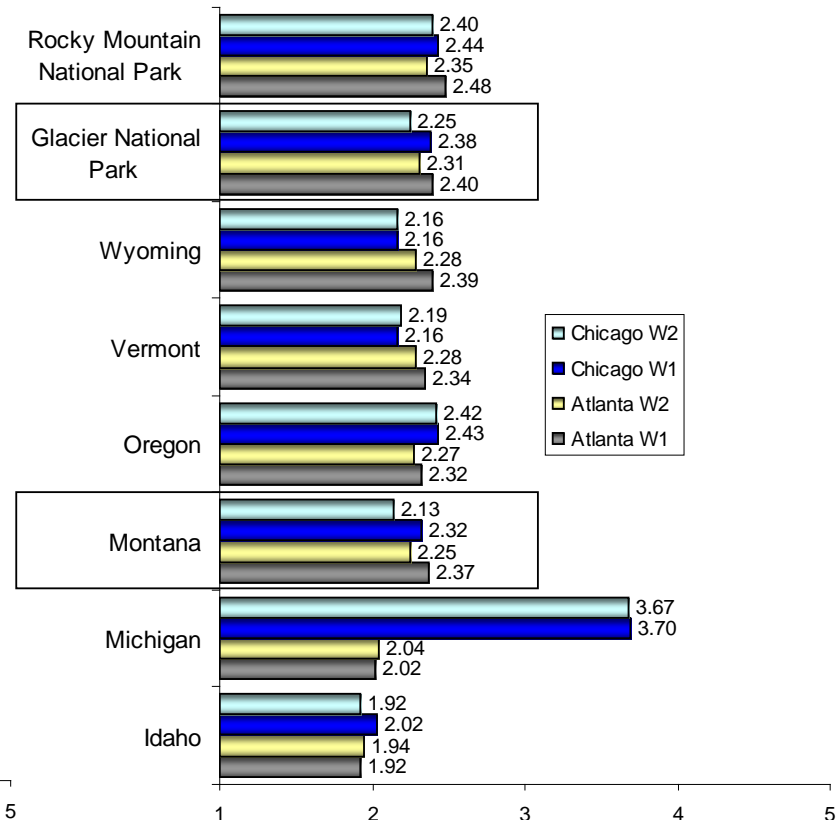
Q: What is the possibility that you will travel to the following destination in the next 18 months?

- California is one of few destinations to directionally increase its likelihood to be traveled to in the next 18 months. Most states and parks, including Montana showed directional decreases in travel likelihood.

### Likelihood to Travel: All Destinations Top 8 Mean Score



### Likelihood to Travel: All Destinations Top 8 Mean Score

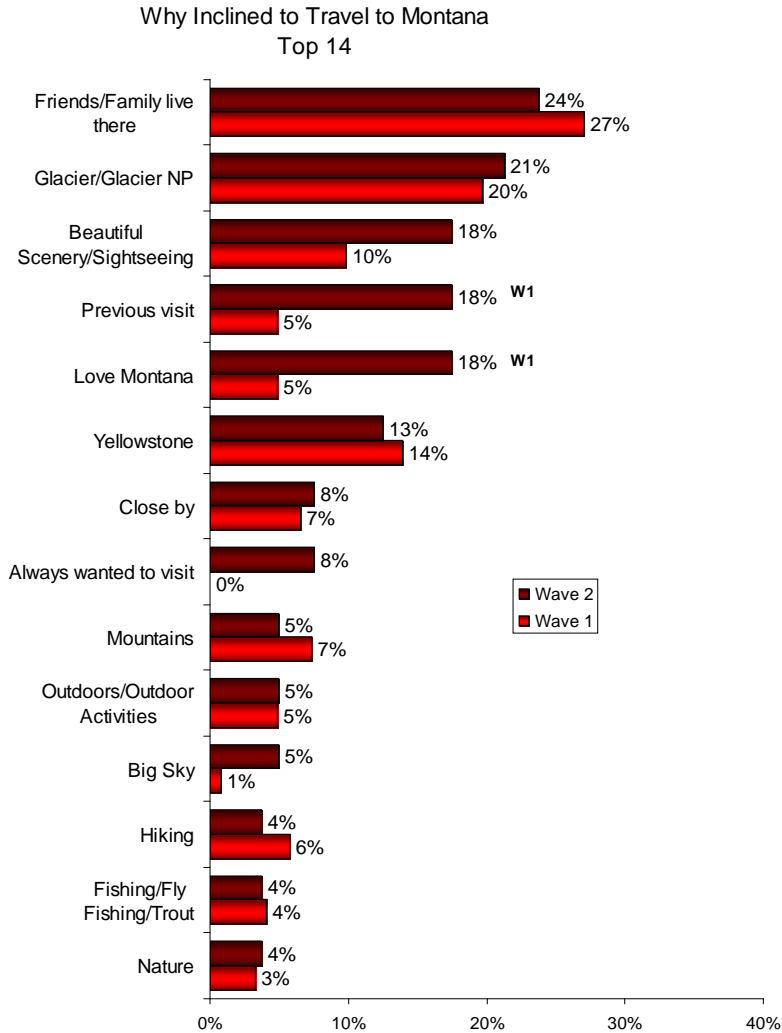


Base = Chicago: 244 W1, 202 W2, Atlanta: 220 W1, 204 W2



# Love for Montana rises as reason to travel

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



The number of Travelers citing their love for the state and a previous visit increases significantly in wave two as a reason for traveling to Montana. Beautiful scenery, always having wanted to visit and big sky all shifted directionally upward from wave one.

### Traveler Comments Wave Two

- *"We just love the state and people. Very friendly people."*
- *"We've been there before, and love to go back time and time again, discovering new venues and sights every time we go back."*
- *"I want to backpack in Glacier National Park before all the glaciers are gone. I have seen photos of the backcountry there and it is absolutely stunning."*
- *"I want to see the spectacular scenery in the Montana mountains and visit Yellowstone. I've not been there before and it's been a lifelong dream."*
- *"Offers some of the best scenery in the country. Unspoiled nature."*
- *"Did not get to drive the 'To the Sun Road' last time as it was still covered in snow in June - can you believe that?"*

Base = Travelers Might or Definitely Will Travel to MT: 122 W1, 80 W2

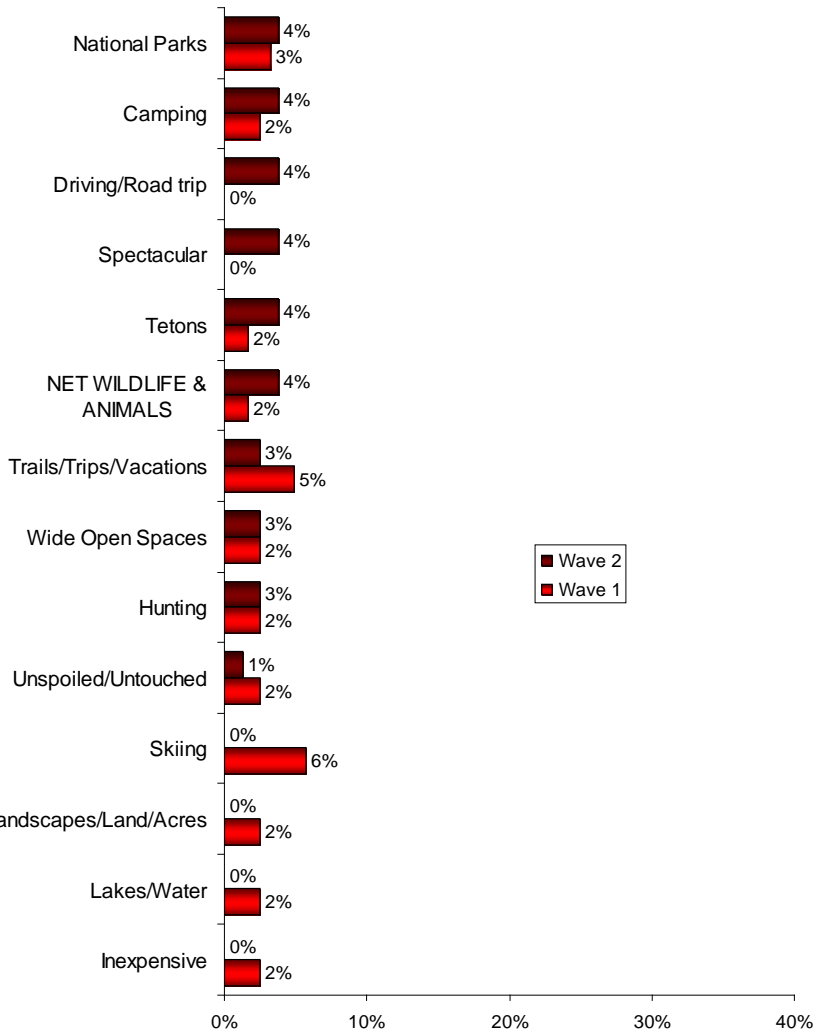


# Road trips and Tetons also drivers in wave two

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

## Why Inclined to Travel to Montana

Next 14



New mentions in wave two include road trips and the Tetons as reasons to visit Montana. Spectacular is mentioned as a word to describe Montana in wave two as well.

### Traveler Comments Wave Two

- *“Montana and Wyoming are the only two states I somehow have never been to, so we are going to Yellowstone/Grand Tetons in July. I've always wanted to go there!”*
- *“A wish to explore the Teton National and Yellowstone National Parks in greater depth than my previous visits.”*
- *“Drive road to the Sun, hiking, rafting. Enjoy great scenery.”*
- *“My husband has a jeep and wants to travel to places where he can go off roading and camping.”*
- *“Glacier National Park; within driving distance for a road trip from my home.”*

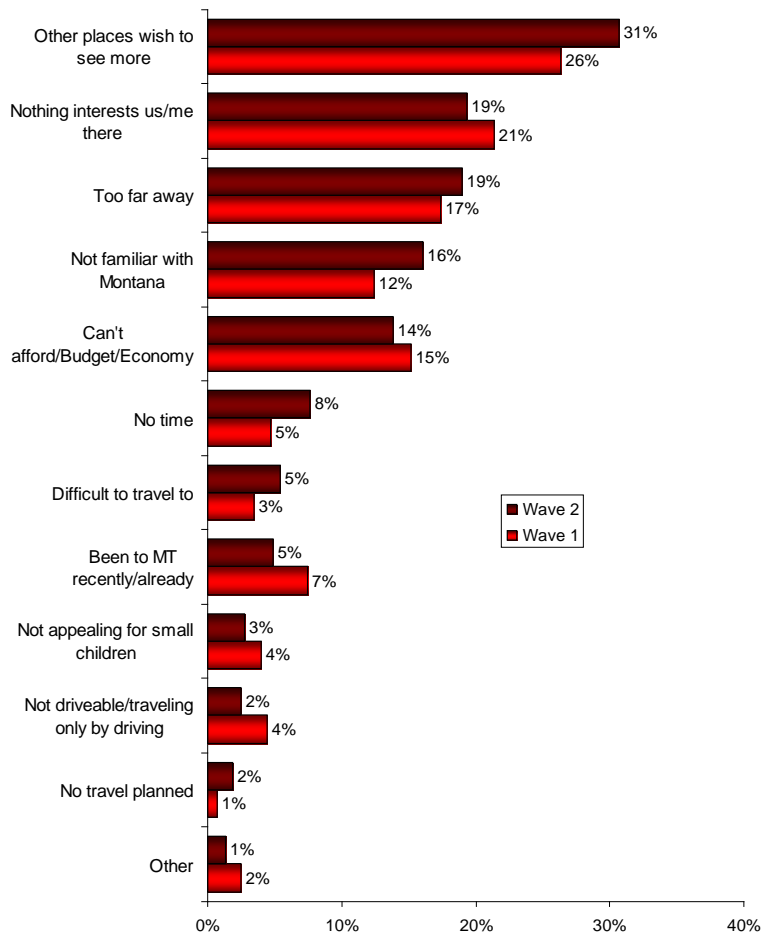
Base = Travelers Might or Definitely Will Travel to MT: 122 W1, 80 W2



# Other destinations taking precedence

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

Why NOT Inclined to Travel to Montana



Of those Travelers who are not likely to travel to Montana in the next 18 months, 31% have other destinations taking precedence for their travel time and budget.

Gen X Travelers in wave two (31%) are significantly more likely to cite other places they wish to see than Gen X Travelers in wave one (19%).

### Traveler Comments Wave Two

- *“We have three young kids and - nothing against a place I've never seen - it's easier to take the kids somewhere I know they're going to like.”*
- *“We looked into a dude ranch vacation about 6 months ago and it was out of our budget. If we ever find something a little less costly, we will reconsider.”*
- *“Unfamiliar with the options for events and activities in Montana. Previously committed plans make it less likely to alter plans to include Montana.”*
- *“Too far from Georgia. Already planned for the next year or two to visit eastern states.”*

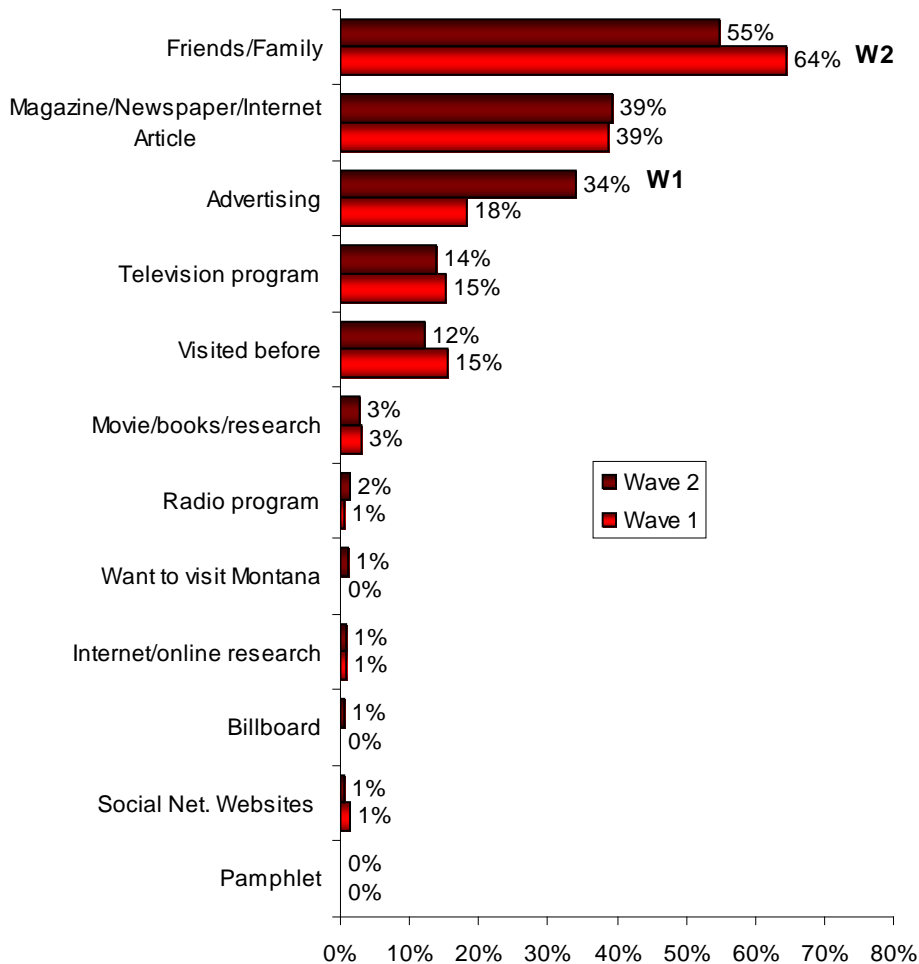
Base = Travelers Not Likely or Definitely will NOT travel to Montana: 403 W1, 368 W2



# Advertising gains as 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



Over one third (34%) of Travelers in wave two select Advertising as a source of information for Montana, a significant increase over wave one (18%).

Friends and family as a source of information declines significantly from 64% in wave one to 55% in wave two.

The Montana State Website was one specific site mentioned.

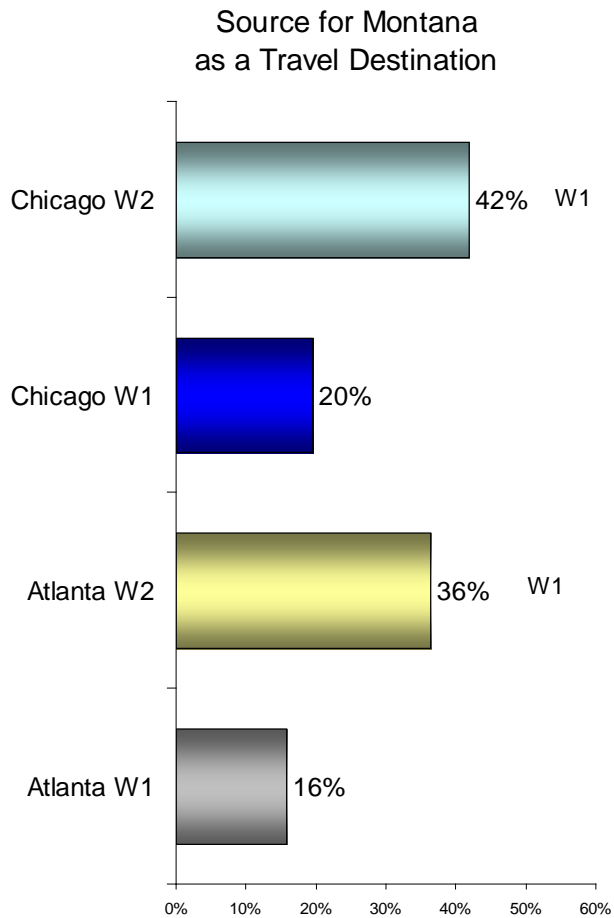
Base = Travelers Familiar with Montana: 396 W1, 330 W2



# Advertising dramatically gains in Atlanta and Chicago

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

Both Atlanta and Chicago see significant increases in the number of Travelers selecting Advertising as a source of information for Montana.

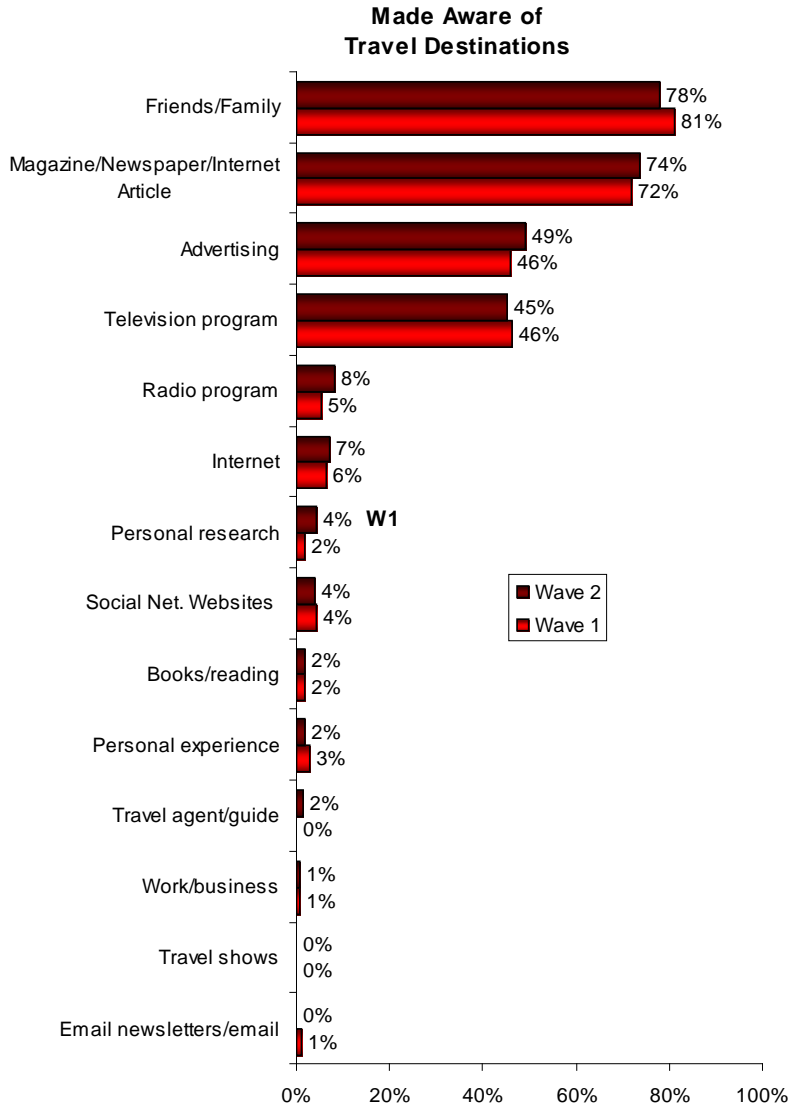


Base = Travelers Familiar with Montana: 396 W1, 330 W2



# All destination sources remains stable

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



The sources remain stable between waves.

Personal research increases significantly to 4% in wave two.

Specific sources mentioned include:

- AAA
- Tripadvisor.com
- Travelzoo
- Interval International
- National Geographic
- Elderhostel
- Fodor's
- Frommer's
- And travel websites/vacation searches



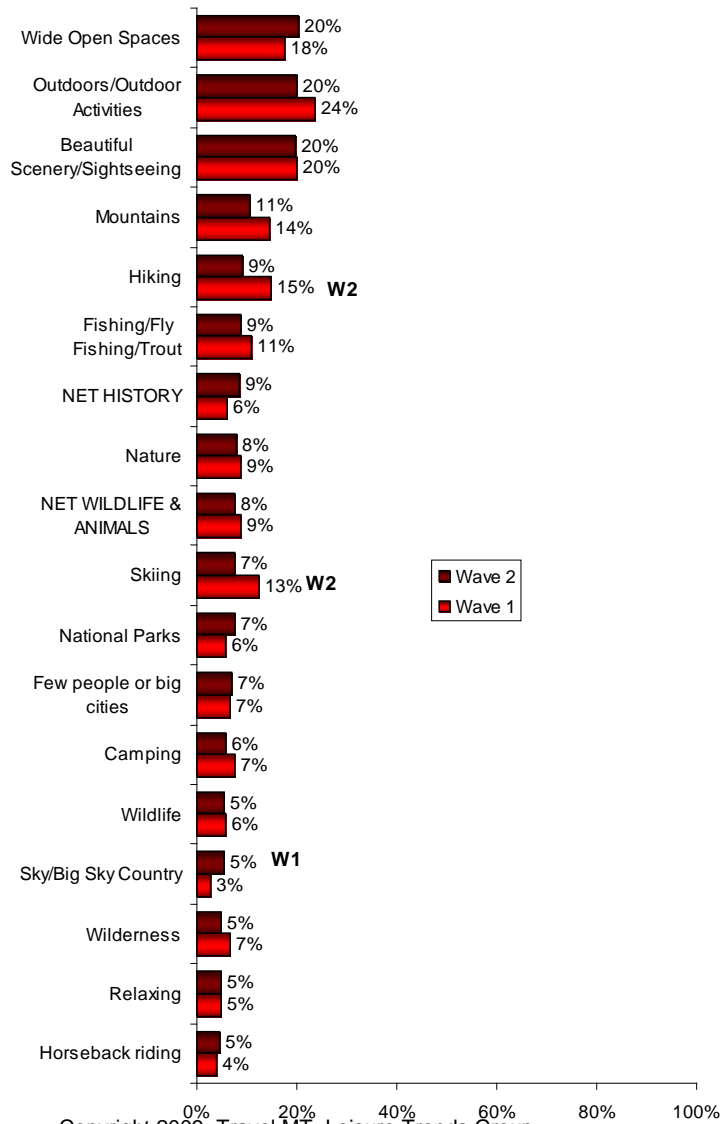
# ***Brand & Competitive Associations***



# Montana's offerings remain stable

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

Montana Offers  
Top 18



- Outdoor activities and beautiful scenery continue to top the list of what Travelers believe Montana offers as well as wide open spaces. Specific outdoor activities such as hiking and skiing declined significantly from wave one.
  - Gen X Travelers in wave one were significantly more likely (16%) to mention hiking than Gen X Travelers in wave two (7%).
  - Boomer Travelers in wave one (19%) were significantly more likely to mention the mountains than Boomer Travelers in wave two (11%).

### Traveler Comments Wave Two

- *“From Washington state; road trip adventure, sweeping views and diverse outdoor environments. Spectacular geography, eccentricity, wildlife, romantic remnants of the wild west.”*
- *“Big Sky, Mountains and prairies, Glacier, and close to Yellowstone, great frontier towns.”*

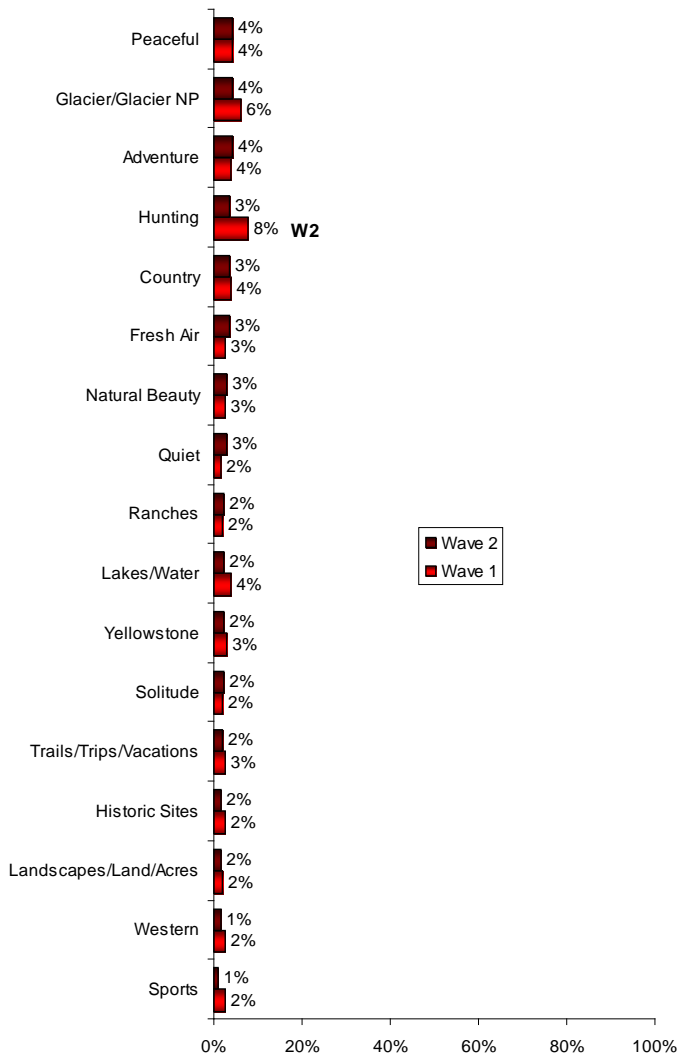
Base = Travelers Aware of Montana: 534 W1, 470 W2



# Montana's offerings remain stable

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

Montana Offers  
Next 17



- Hunting also significantly decreased from wave one to wave two.

### Traveler Comments Wave Two

- *“Fresh air, mountains, beautiful sites, remoteness.”*
- *“Peaceful, rustic, nature.”*
- *“Wide open spaces. Peaceful places to get away. A totally different type of scenic countryside.”*
- *“Clean air, water, and open spaces. Solitude.”*

Base = Travelers Aware of Montana: 534 W1, 470 W2

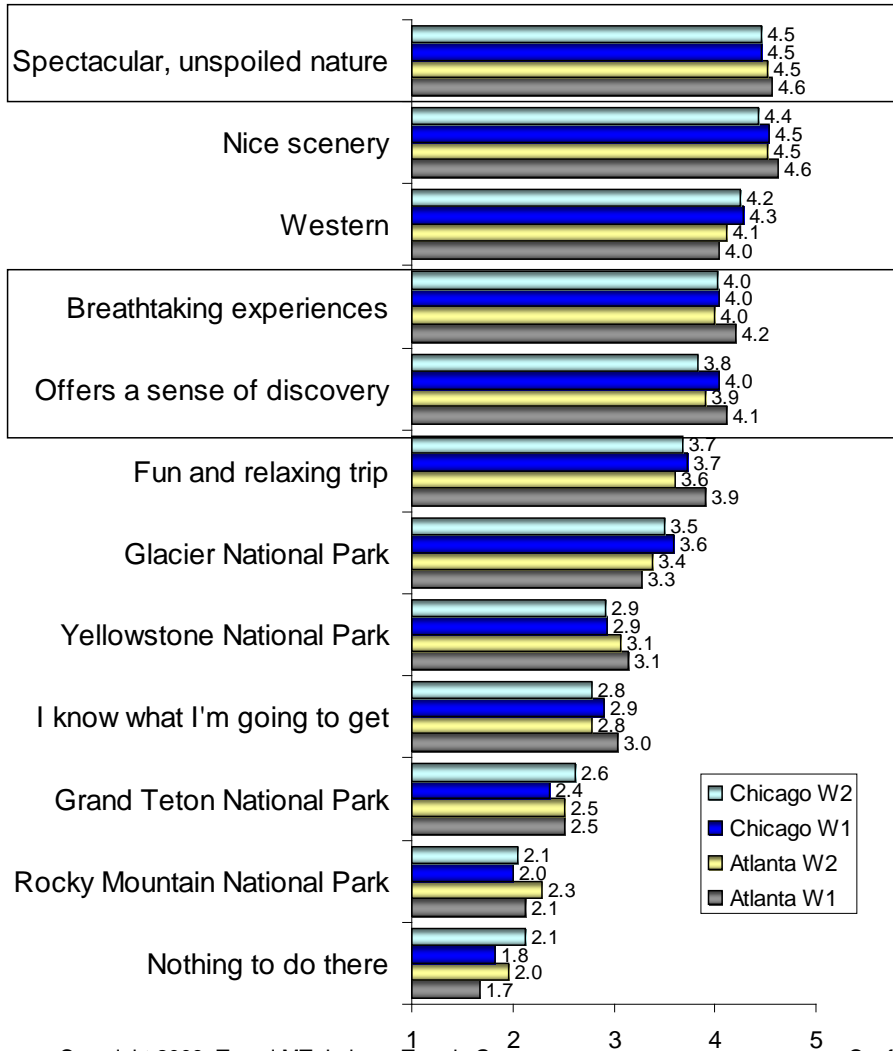


# Key attributes remain strongly associated with Montana

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

The key attributes focused on in the advertising still lead the list of associations Travelers have with Montana in wave two.

Associate with Montana  
Mean Score



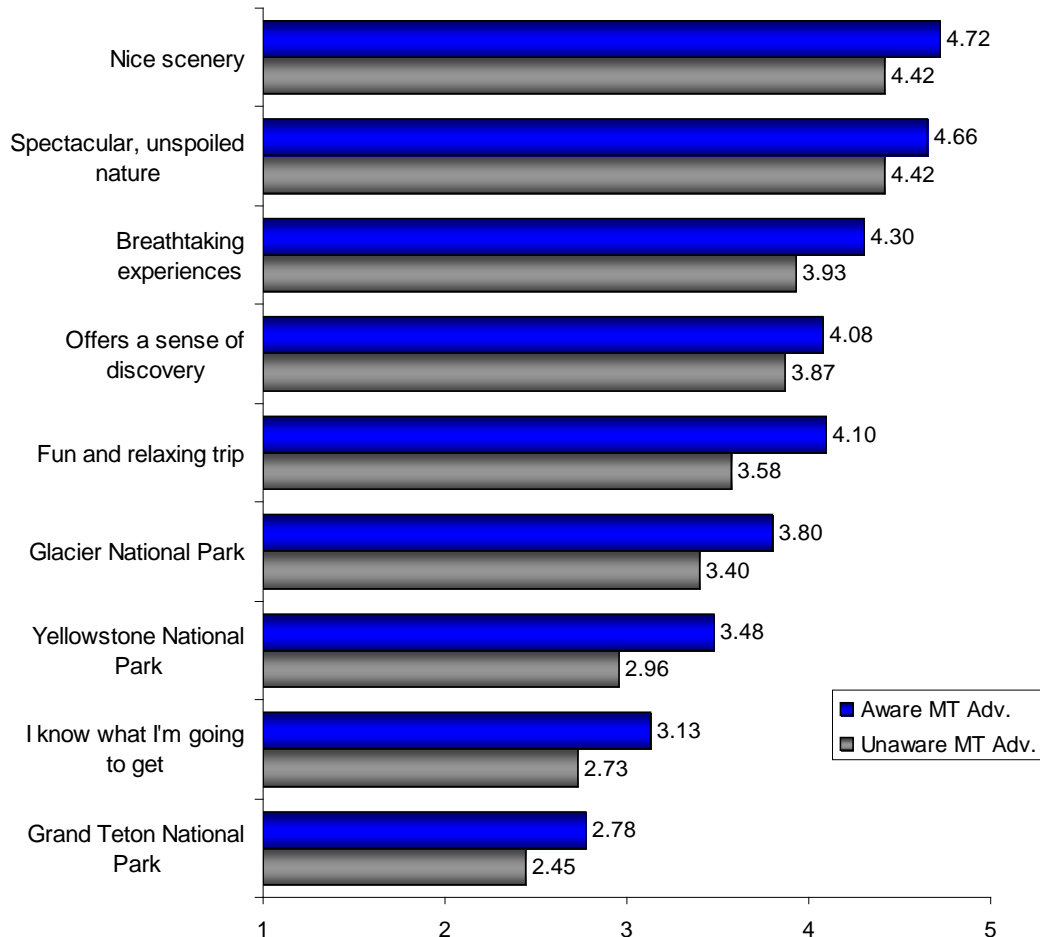
Base = Travelers Aware of Montana: 535 W1, 477 W2



# Advertising delivering on many attributes

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

Associate with Montana  
Significant Differences  
Mean Score



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

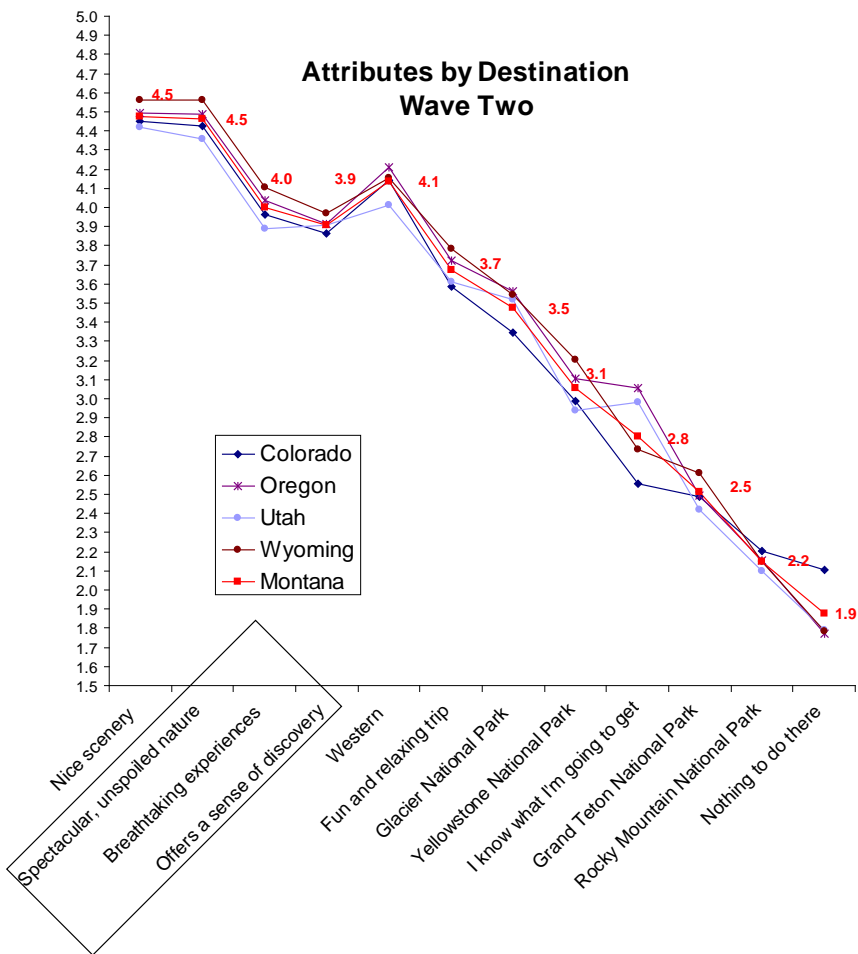
Base = W2: 90 Total Travelers Aware of MT Advertising, 387 Unaware



# 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, with little change seen between waves.



Base = Varies based on awareness of each Destination



# *Next Steps*



Leisure Trends recommends a yearly tracking study, conducted in late April to coincide with the ongoing media schedule and ensure continuity in timing. This will result in the following benefits:

- Many directional shifts will be validated with the increase in data points.
- Brand and Advertising Awareness, both Unaided and Aided can be monitored as the advertising campaign takes hold.
- Consideration of travelling to Montana in the next 6-18 months and perceptions of what Montana offers to travelers can be assessed as the economy stabilizes.
- Emerging trends can be spotted and explored over time.



# *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:

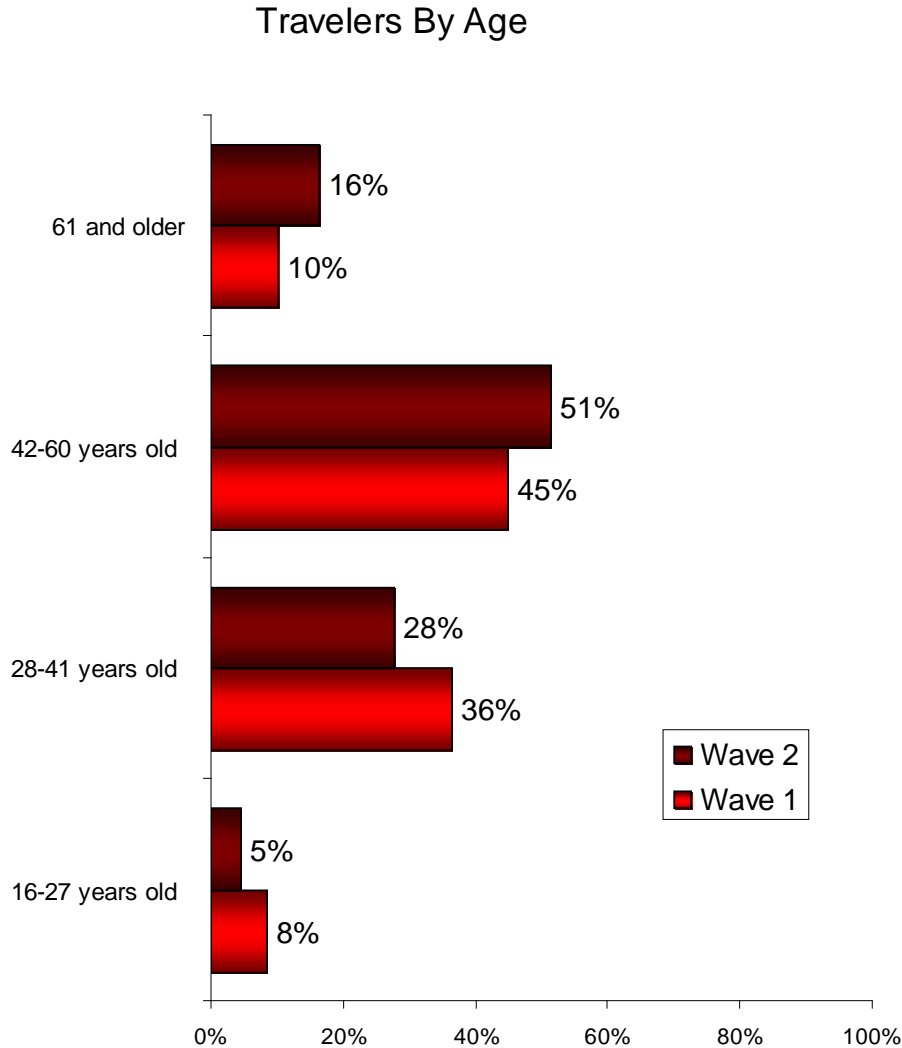
Seek out experiences that make their world bigger  
Fighting against the homogenization of experience  
Motivated by what makes one place distinct from another  
Global Citizen  
Intellectual Curiosity  
Green Awareness and Green Behaviors



## *Frugal Experientialist & GeoCore Profile*



Q: Which of the following categories includes your age?



Mean Age: 43 W1  
47 W2

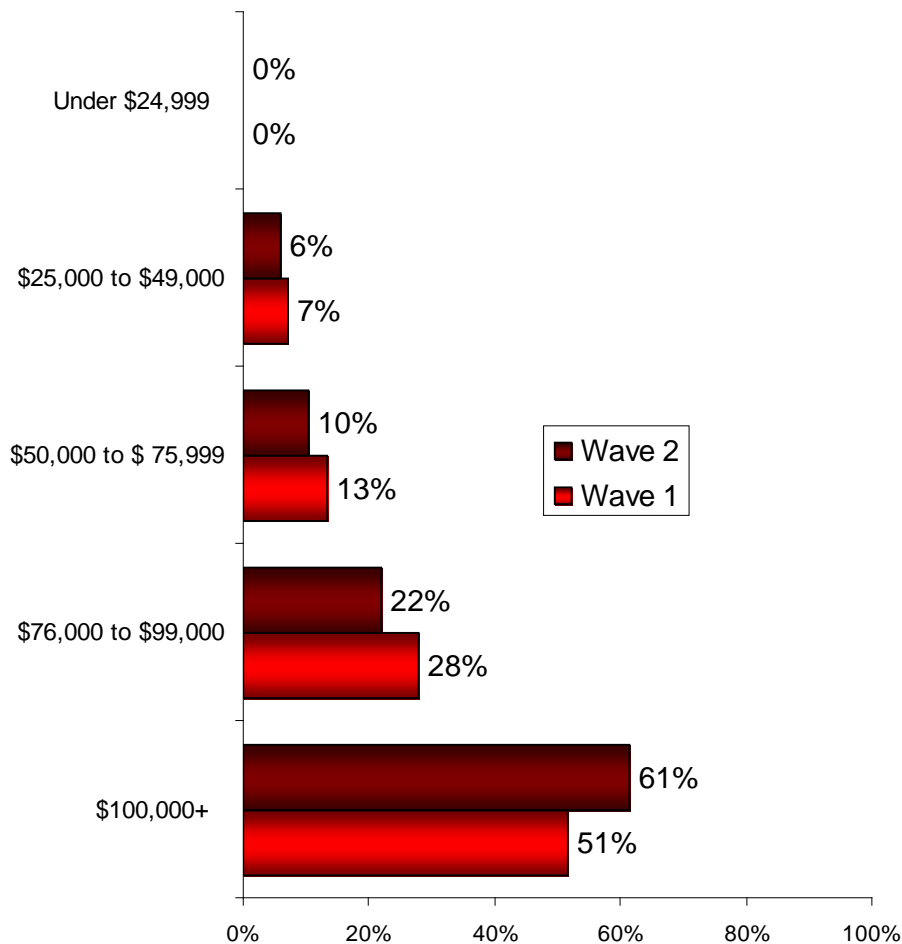
Base = Total Respondents: 720 W1, 640 W2



# Travelers by Household Income

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

## Travelers By Income

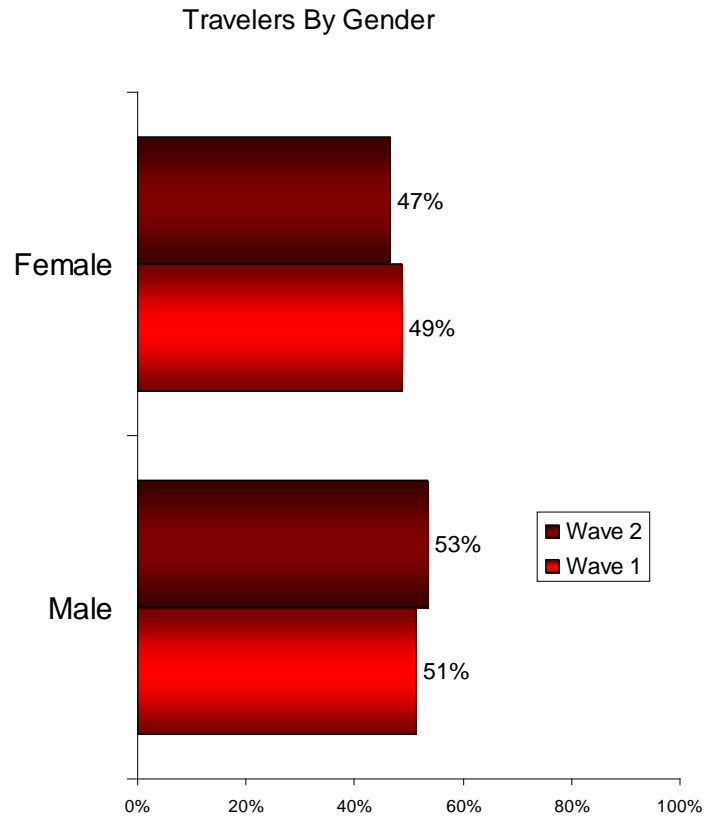


Mean Household Income: \$81,530 W1  
\$84,420 W2

Base =Total Respondents: 670 W1, 602 W2



Q: What is your gender?

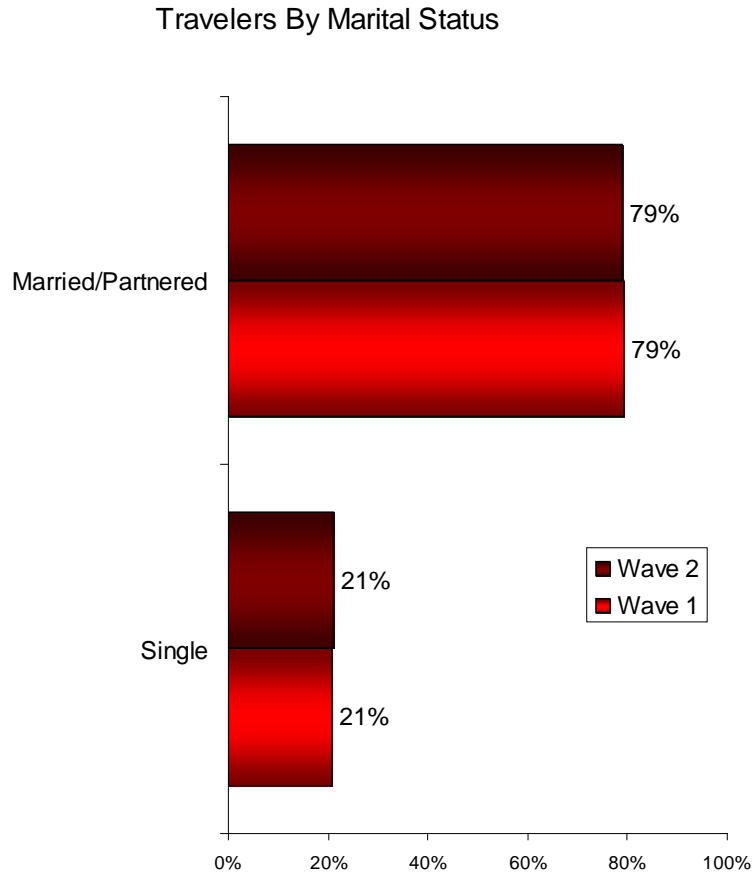


Base =Total Respondents: 720 W1, 640 W2



# Travelers by Marital Status

Q: What is your marital status?



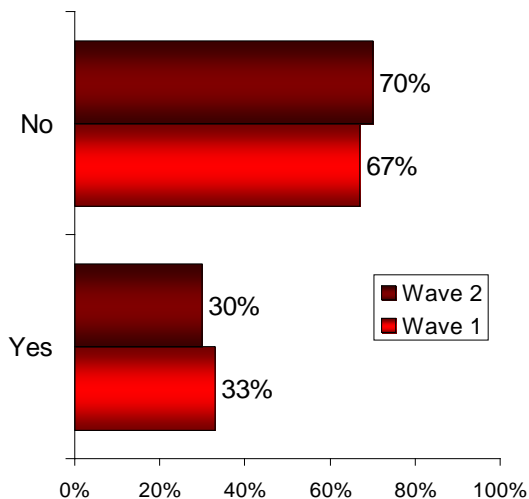
Base =Total Respondents: 705 W1, 632 W2



# Travelers by Number of Children in Household

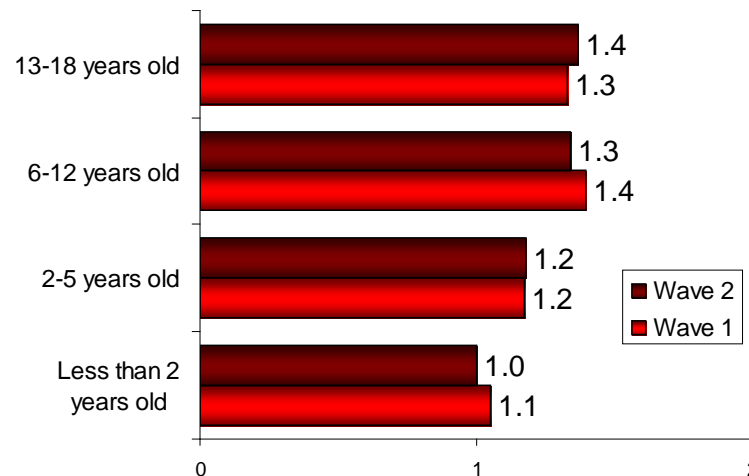
Q: Are there children, under the age of 18 currently living in your household?  
Q: How many children are currently living in your household in the following age ranges?

### Travelers With Children in Household



Base =Total Respondents: 720 W1, 640 W2

### Number of Children in Household By Age



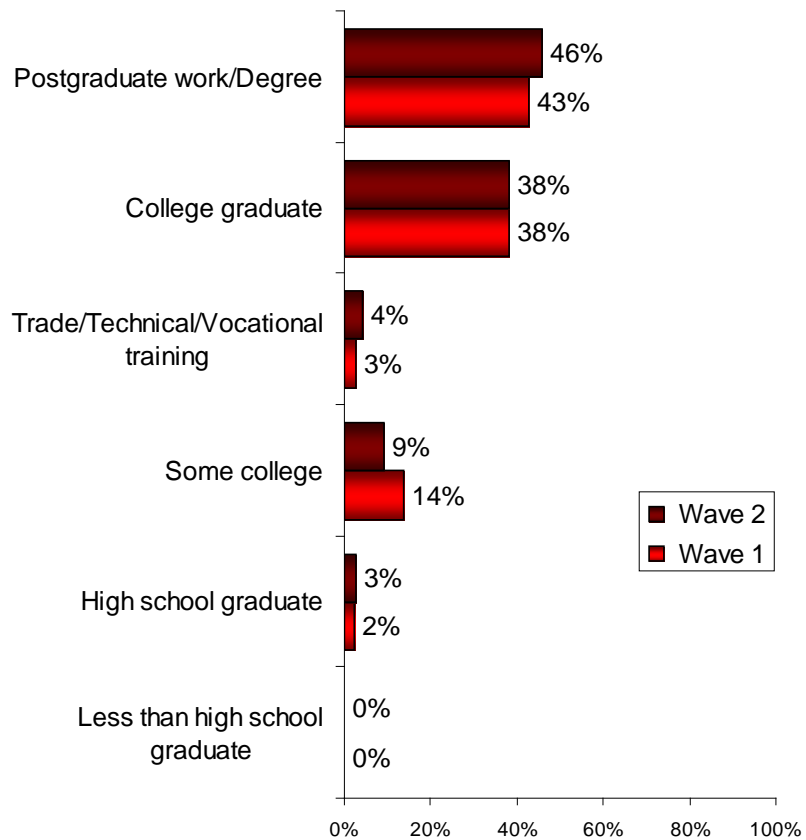
Base =Respondents with Children: 231 W1, 187 W2

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



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

### Travelers By Education



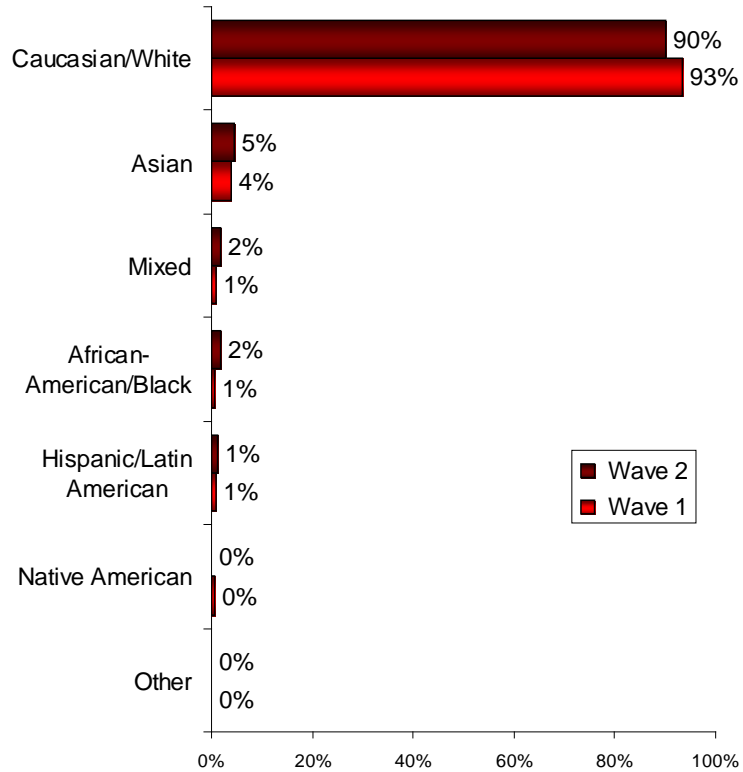
Base =Total Respondents: 716 W1, 637 W2



# Travelers by Ethnicity

Q: What is your ethnicity?

Travelers By Ethnicity



Base = Total Respondents: 612 W1, 533 W2