

Great Falls Montana Tourism FY19 Marketing Plan



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Executive Summary

Founded in 1883, the City of Great Falls has a population of nearly 60,000 residents and is the county seat of Cascade County. Great Falls is named for a series of five waterfalls on the Missouri River that was made famous by Lewis and Clark's 31-day portage of the falls – the longest the duo spent in any one location. The promise of hydroelectric power and rail access was instrumental in the founding of Great Falls. The first hydroelectric dam was built in 1890, attracting industry and visitors to the "electric city."

Great Falls visitors can enjoy nearly every outdoor activity available in Montana:

hiking, road, trail and mountain biking, hunting, fishing, swimming, kayaking, canoeing, cross-country skiing, snowshoeing, and many opportunities for viewing local wildlife. The city offers an extensive hiking and biking trail system along the river, three golf courses, a disc golf course, a skate park, a water park, a 15-field soccer park, a minor-league baseball stadium, and a system of city parks. Nearby is Giant Springs State Park, the First Peoples Buffalo Jump, two ski resorts, and the Bob Marshall Wilderness. The most well-known natural attraction in the region is Glacier National Park. Great Falls also offers one of the more convenient starting points for travel to Canada's Waterton Lakes National Park.



Great Falls is home to Malmstrom Air Force Base and the 341st Missile Wing. It has a significant history and geographic presence in the city. The base attracts contractors traveling for business, but most of its service members stay siloed from the community.

Tourism is a critical driver of the Great Falls economy, accounting for 8% of the GDP. According to the Institute for Tourism and Recreational Research, non-residents spend on average \$250 million in Cascade County. 87% of those expenditures are spent on dining, retail, fuel, lodging and grocery stores. Businesses that make up the Tourism Industry account for 3,080 jobs and over \$72 million in payroll. Tourism Industry businesses account for over \$33 million in property taxes.

Great Falls Montana Tourism is focused on one vision, to strengthen the Great Falls Montana economy by being the preferred choice for a genuine Montana experience. We work to bring that vision to reality every day by promoting Great Falls Montana as a preferred destination for travelers to visit, stay, and return. The strategies that govern the implementation are:

- Share Great Falls' unique adventures and amazing art
- Focus on diverse landscapes and uncrowded spaces
- Showcase the "too much to do"
- Develop Champions of Great Falls
- Grow Meetings Segment
- Engage More Voices
- Lure Next Generation of Travelers
- Support, Celebrate and Create Assets

Great Falls Montana Tourism implements this by creating, delivering and integrating content, placing media nationally in targeted markets, engaging potential and previous visitors through social sites, website, newsletters, and the Visit Great Falls app. Great Falls Montana Tourism supports champions with great tourism ideas through grants, we gain insight and educate potential visitors through trade shows in key markets, we develop and source photos and videos and create NEW signature events that will level out annual seasonality.



Our investment in market and consumer behavior research is essential to ensure the delivery of a specifically crafted trip planning message during a critical stage of the consumer purchase process.

Great Falls is at a critical crossroad. In the past 8 years, Great Falls has seen a 28% growth in visitation; however, the last years have been stagnant. The message of Great Falls | Montana's Basecamp for Art & Adventure resonates with our target market; however, our budgets fail in comparison to our peer Montana cities, regional destinations, and National attractions. Lower budgets can be

combated effectively with proud, Great Falls Montana Champions. We know that consumers are 85% more likely to act based on a recommendation of a friend, or a friend of a friend than any paid media.

In FY18, Great Falls Montana Tourism identified strategic outcomes for its marketing. These are outcomes that are focused on a three-year strategy. We

have established a cohesive tourism brand that positions Great Falls as a premier destination for targeted groups by using our Montana's Basecamp for Art & Adventure message. We have made significant progress towards getting buy-in and promote the use of Great Falls' tourism identity by Great Falls Montana Tourism members, its strategic partners, and the entire Great Falls community. Our local economic development organization, Great Falls Development Authority has adopted messaging, colors and images that support the Basecamp message. Our Downtown Great Falls Business Improvement District adopted imaging for the Downtown Banners that reflect the Basecamp message. We still have work to do, but early adopters are helping to build the identity.

Great Falls Montana Tourism is still working toward these outcomes:

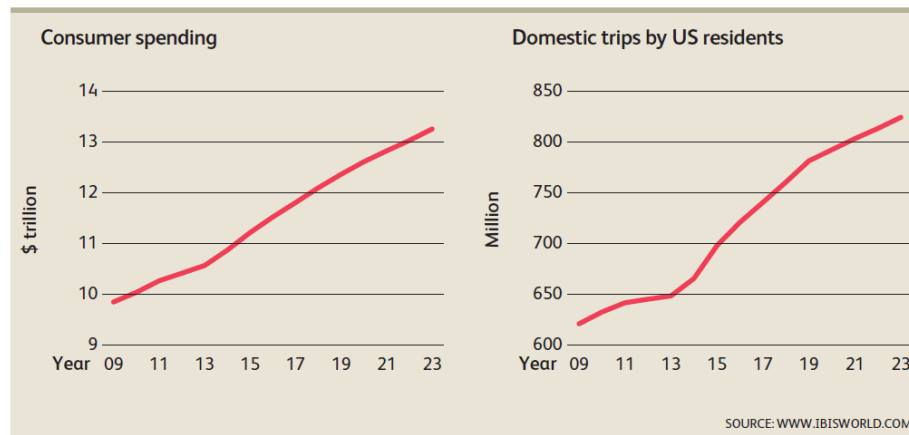
1. Increase overnight tourism visitation
2. Increase group meeting stays
3. Increase attendance at key events like the Montana State Fair, Western Art Week, and the PRCA Circuit Championship
4. Increase foot traffic at Great Falls International Airport
5. Raise the profile of the city within targeted audience groups and regions both on and offline (e.g. in-state visitors from Central and Eastern Montana, Canadian regional travelers from communities near the border, and out-of-state visitors from cities with direct flights to Great Falls)

Challenges still exist for Great Falls Montana Tourism to achieve the outcomes. The open space and natural beauty of Montana continues to lure travelers to our rugged landscapes. Non-Resident visitation continues to grow in Montana overall; however, Great Falls Montana Tourism is challenged to get those independent adventurers to leave the National Park Regions to experience a true, authentic Montana experience on the Missouri River in the heart of MONTANA. Great Falls provides a BASECAMP for a wide range of outdoor adventures and offers a haven of rich arts, culture, and history in a vibrant, modern community where the expansive, unspoiled, diverse landscape renews one's spirit. However, with 84% of Great Falls' overnight guests traveling by car, visitors to Great Falls must drive for several hours to access Glacier National Park, and its popular western entrance is even farther away. By car, visitors from the west, south, and southeast must pass through several cities that most directly compete with Great Falls, including Missoula, Butte, Bozeman, and Billings. Tenacious, determined, and focused on the future, Great Falls Montana Tourism is dedicated to growing tourism.

Great Falls Montana Tourism must position the city as the premier destination for the experiences the city offers and target audiences seek. Finally, Great Falls Montana Tourism must engage these groups using effective tools and measurable campaigns that build awareness and drive visitation.

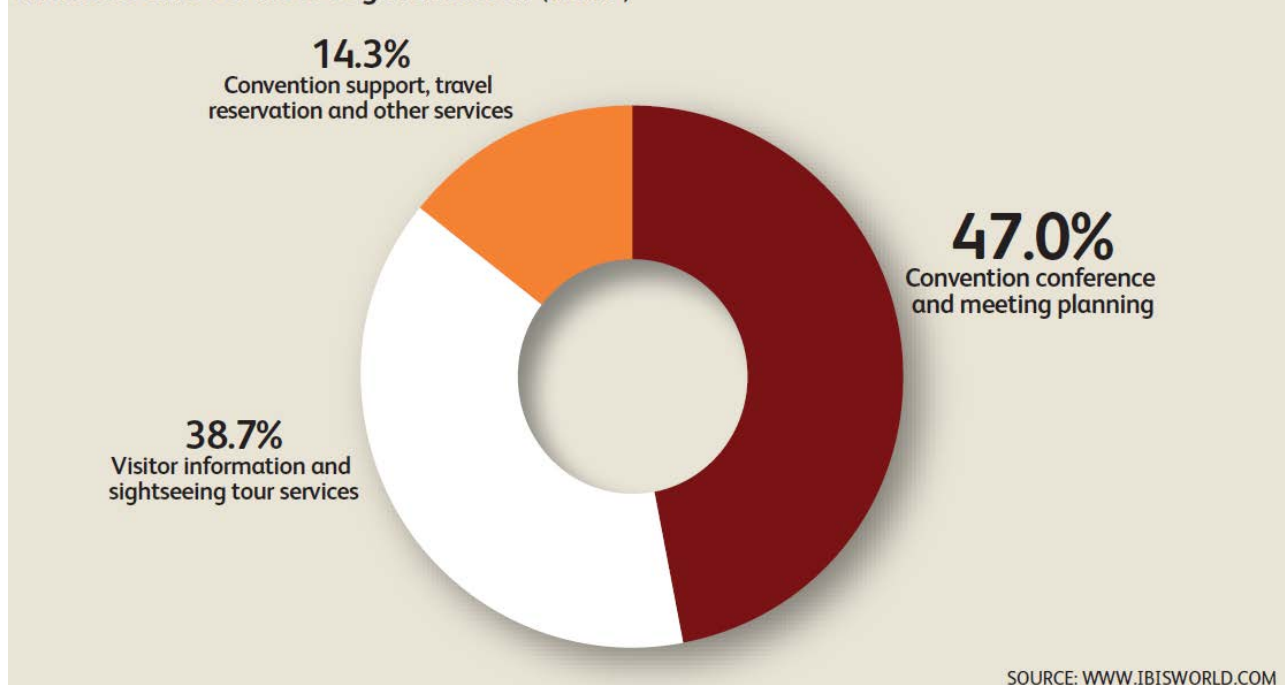
Industry

The Destination Management Organization [DMO] is part of a mature industry driven by continued growth in domestic travel and strong, growing consumer spending. This industry is defined by organizations that market and promote communities and local facilities to business and leisure travelers. Nationally, organizations provide travel information on attractions and accommodations, maps and brochures, and some even organize and deliver group tours.

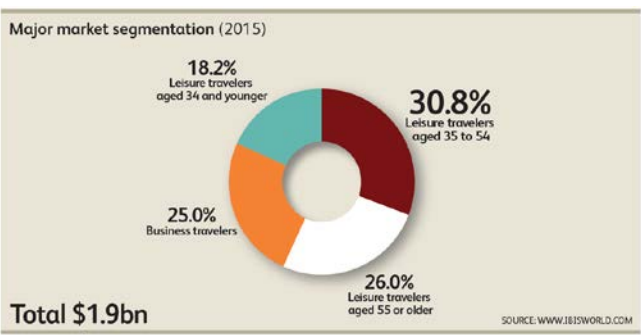
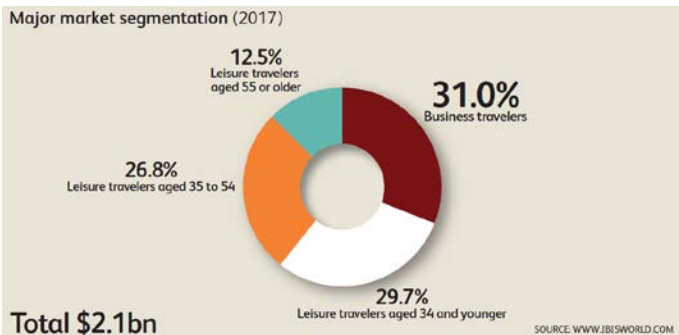


The industry nationally is led by Las Vegas CVB with 16.6% of total market share, followed by Visit Florida with 11.7%. From 2015 to today, the service focus has stayed relatively the same with 47% of efforts spent on securing Convention and Meeting Planning and just under 39% spent on leisure travel.

Products and services segmentation (2017)

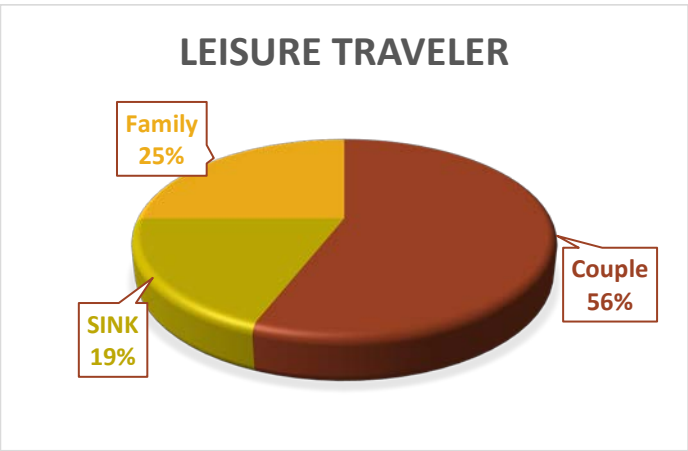
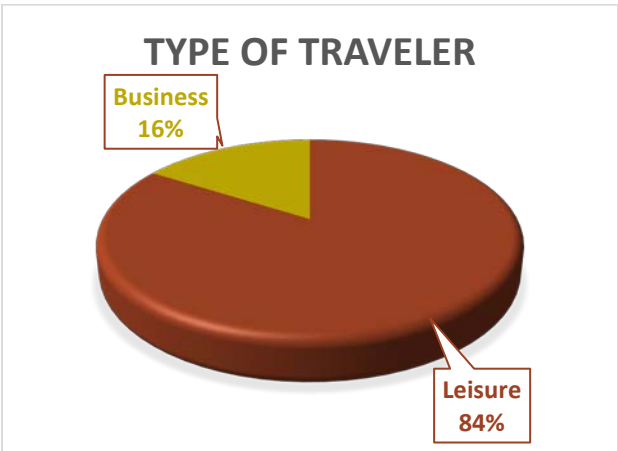


The service focus follows the markets that DMOs work to serve. The Business Traveler segment has grown 6% nationally over the past 3 years and a substantial shift in the 34-year-old and younger segment gaining 11.5% in 3 years and the 55-year-old and older segment decreasing 13.5%. The leisure traveler 35-54 has decreased 4%, nationally.



Great Falls Montana

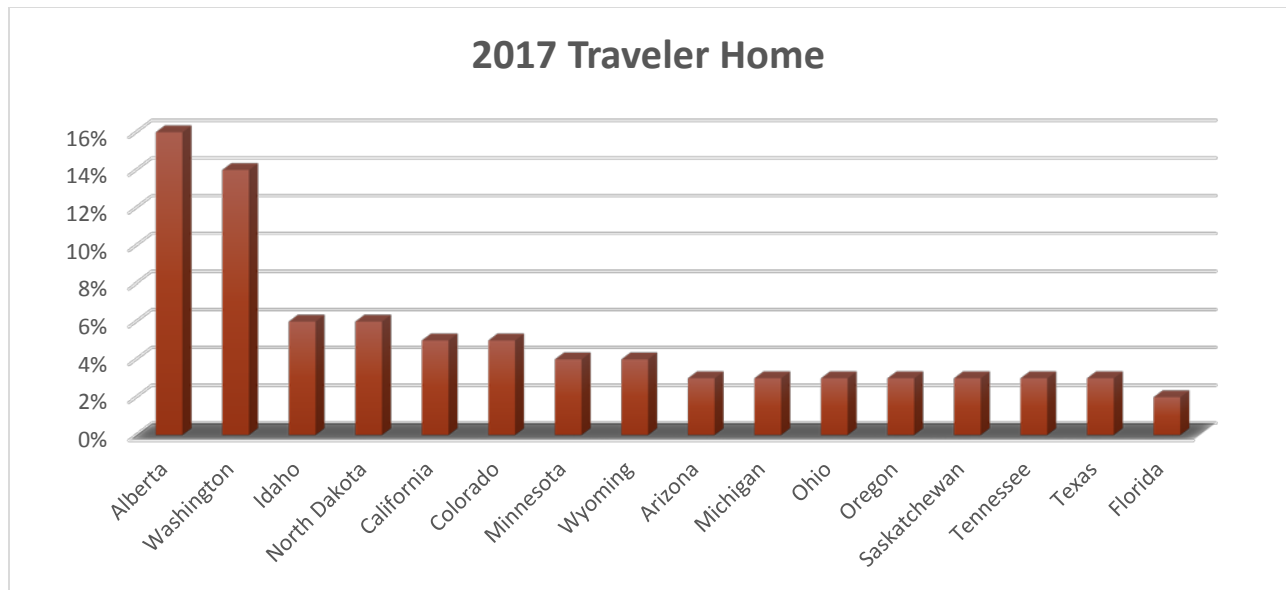
In Great Falls, the Business Traveler segment has been stagnant, however, hasn't had substantial investment until recently.



The constant profile of the Great Falls leisure traveler is between the ages of 55-64, with income of \$75,000-\$150,000 annually, traveling as a couple by personal vehicle.

The Great Falls, Montana tourism economy is driven by the Alberta traveler. This traveler comes to Great Falls, Montana to shop, receive medical care, and to travel from GTF to warmer climates, predominately Las Vegas, followed by Phoenix. The high concentration of Alberta in our customer mix is nothing new making the Alberta economy a key factor in our local industry.

Great Falls, Montana receives visitors both domestically and internationally, however the home base for our top travelers remains consistent.



The only outlier in 2017 comes from North Dakota, accounting for 6% of our guests, up from 3% in 2015 and not registering in 2016.

Historic Top 5 Visitor Residency Locations

Year	Location	%	Location	%	Location	%	Location	%	Location	%
2017	Alberta	16	Washington	14	Idaho	6	North Dakota	6	Colorado	5
2016	Alberta	16	Washington	9	Colorado	6	Idaho	5	Utah	4
2015	Alberta	19	Washington	11	California	8	Idaho	6	Texas	5
2014	Alberta	17	Washington	14	Wyoming	6	Colorado	5	California	5
2013	Alberta	19	Washington	10	California	6	Wyoming	6	Texas	5
2012	Alberta	25	Washington	12	Idaho	6	Minnesota	5	Colorado	5

In 2017, Great Falls Montana hosted 892,958 people overnight, a 19% decrease over 2016. 78% of those visitors have been here before. 84% of the Great Falls non-resident traveler market drove in, by RV, Motorcycle or Automobile. 15% arrived by plane, 5% through Billings air service and 10% through Great Falls air service.



Great Falls International Airport is serviced by Delta, United, Alaska, and Allegiant, providing direct flights from Seattle, Las Vegas, Phoenix, Salt Lake City, Denver, Minneapolis, and Chicago seasonally.

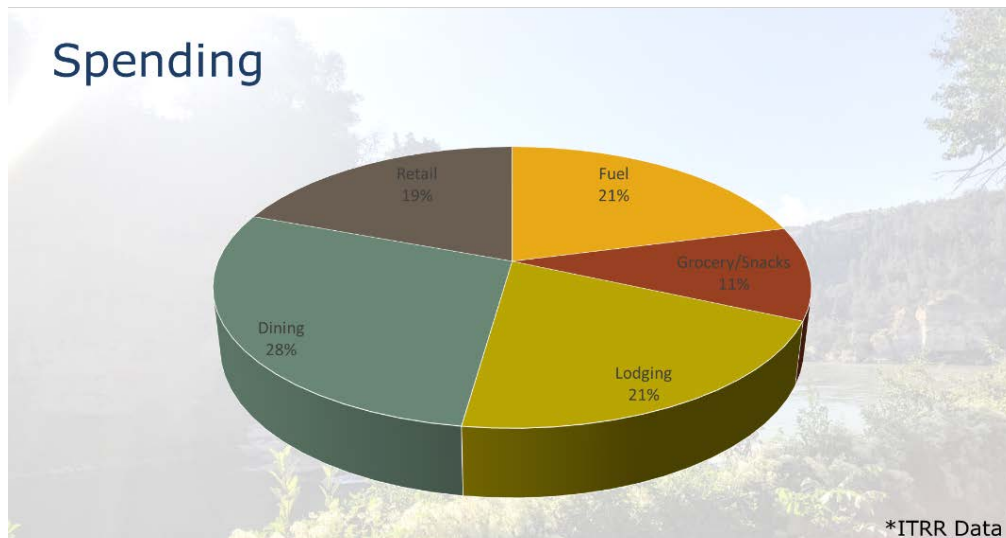


This summer, the United Chicago seasonal flight will be daily, Allegiant is increasing the seating capacity for Las Vegas and Phoenix, and Alaska is adding a flight to Seattle. This increased capacity provides air travelers more opportunity to come to Great Falls, Montana.

The visitation and airport deboarding trends in Great Falls, coupled with our room demand data, indicates there may be a strong shift by travelers from staying in lodging facilities to camping. We often hear from travelers the cost to stay in hotels is high and the rooms are limited in availability as concerns for travel. For Great Falls, cost is reasonable, and rooms are available throughout the year. This is a different story from some of our peer cities.



In 2016, Non-Resident Visitors spent just under \$204 million in Cascade County, with the majority of spending occurring in the traditional top 5 categories: Dining, Retail, Fuel, Lodging, Grocery/Convenience Stores.



Great Falls, Montana received 6% of the total 12.4 million visitors to the State of Montana and 6% of the total visitor spending. This is down 3% from 2016.

Competition

The appeal of Montana's spectacular, unspoiled nature, inspires people to travel. However, as the 4th largest state in the US, with 6 travel regions and over 100 vibrant and charming small towns that provide impressive outdoor experiences, Great Falls competes within the State, as well as the Northwest Region and the Nation to orient and facilitate the visitor to experience Montana's Basecamp for Art & Adventure. The competitive analysis ensures Great Falls differentiates itself and delivers the experience it promises.

In State

Billings | Positions itself as Montana's Trailhead, it sells the starting point for a drivable vacation through Montana's outdoors. Similar to Great Falls in landscape and location to a National Park, Billings outperforms Great Falls by being Montana's largest City and having an established, strategic Tourism effort.

Bozeman | Presents an upscale vacation destination with hotels, shopping, museums, and symphony to match its ski resort, cross-country trails, natural hot springs, and breweries.

Missoula | A university town that promotes a variety of amenities and experiences without focusing on any one option. Montanans know the city as

a laid-back city for fly fisherman, paddle boarders, and mountain bikers. Features many microbreweries and a distillery.

Kalispell | The popular western gateway to Glacier National Park, offering closer accesses to its popular attractions. Positions itself as a vacation destination and its airport (though smaller than Great Falls') makes it accessible to out-of-state travelers.

Out of State

Sioux Falls, South Dakota | Sioux Falls is nearly three times the size of Great Falls. The city has a strong tourism website that promotes attractions and tourism-related businesses. Downtown Sioux Falls has access to the Big Sioux River and the scenic Falls Park, with an outdoor sculpture garden and nearby Native American and Early European historic attractions. The city has a range of shopping, dining, and hospitality options, but limited outdoor recreation attractions.

Fargo, North Dakota | With a population nearly double that of Great Falls, the city highlights an eclectic mix of art, culture, dining, and other attractions online. The website leverages social content from visitors and residents to demonstrate the broad range of venues and activities available for people to enjoy. Art museums and festivals are promoted heavily. The city has access to open space and wilderness for activities like hunting, fishing, golfing, biking, cross-country skiing, and snowmobiling, but there are no major outdoor attractions nearby.

Bismark, North Dakota | The capital city of North Dakota has done a good job with meetings and conventions, drawing over 100,000 people annually. They promote their downtown and have been ranked as one of the top 100 places to live. Their website leverages videos to tell visitors about featured activities from their new heritage museum to riverboat cruises to golf.

Boise, Idaho | The impressive river city is the capital of Idaho with over 220,000 residents. With similar elements to Great Falls, Montana and a history of growth Great Falls would like to emulate, the aligned community efforts to secure funding, and support a growing leisure and business travel industry is worth taking note of.

Canadian communities with direct access to wilderness north of Glacier | Great Falls is well-positioned to compete with this set, being located just as close to wilderness, as communities like Cranbrook, and logistically more convenient, with access to the Great Falls International Airport. Even with a three-hour drive to Waterton lake, flying through Great Falls International Airport is preferred by many U.S. fliers.

SWOT

Strengths

- **ART** | Great Falls' deep connection to Lewis and Clark's historic expedition and its hydroelectric heritage have spawned several museums and historic sites. This may draw a select group, but enriches the visitation experience for other tourists and meeting attendees. The C.M. Russell museum has anchored the arts in Great Falls since the artist's death in 1930. Russell became the world renowned "Cowboy Artist" working and living in the city. Great Falls also has two more art museums and over a dozen art galleries.
- **GROWTH** | Downtown and riverfront neighborhoods have new restaurants, coffee shops, and breweries, and many offer live music and events. These new options have changed the experience that had been dominated by older bars and casinos, energizing the dining and nightlife experience for visitors and locals alike.
- **BASECAMP** | Great Falls has a large network of hiking and biking trails, a significant collection of city parks, a water park, skate park, ball fields, and Giant Springs State Park. The River's Edge Trail offers 53 miles of multipurpose trails including great views of the city's largest waterfall, Rainbow Falls. Bob Marshall Wilderness Area and the Helena-Lewis and Clark National Forest are nearby, as is the First Peoples Buffalo Jump. The Eastern entrance to Glacier National Park is a two-and-a-half-hour drive. Great Falls offers the most convenient airport access for Canada's Waterton Lakes National Park. The Missouri River offers visitors fly fishing day trips and overnight stays in fishing cabins.
- **CENTRAL** | location within the State and region for long-distance travelers – Situated on Interstate 15, Great Falls is roughly halfway between Salt Lake City, Utah, and Edmonton, Alberta (via Highway 2 in Alberta, Canada). Travelers by car travel up and down the I-15 corridor.
- **MAFB** | Local businesses and Malmstrom Air Force Base bring a significant group of long-term contractors and business travelers to the city.
- **GTF** | This international airport is small and accessible. The airport offers direct flights from Seattle, Denver, Las Vegas, Minneapolis, Phoenix, Salt Lake City, and Chicago, seasonally.

Weakness

- **PERCEPTION** | Great Falls has had a reputation as a rusty industrial town made up of dive bars and casinos. While it is not surprising that other Montana communities have held on to this negative view, it is Great Falls natives that perpetuate this perception despite real change and growth in the community.
- **NEW** | Great Falls Montana Tourism is relatively only a few years old. With substantial organizational and operational successes to date, the established identity, marketing strategy, and other foundational elements need time to

work and be refined, to position the city as a tourism destination or to increase visitation.

- **IMPRESSION** | Immediate thoughts of Montana include Mountains, and Great Falls, on the Missouri River, is surrounded by four mountain ranges, but not in any of them. Main thoroughfares have noticeable casinos and industrial infrastructure. These elements of the community are not attractive to many tourists and meeting planners.

Opportunities

- **REPUTATION** | Online reviews of Great Falls are positive. People that already visit Great Falls enjoy it and are likely to return. This group should be studied and targeted. The positive experience current visitors have should be shared on a larger scale.
- **MILITARY** | While military personnel have traditionally been siloed from life and culture in Great Falls, Malmstrom Air Force Base's nearly 3,500 residents hail from all over the United States and, if properly engaged with the community's assets, can become tourism ambassadors for Great Falls when returning home.
- **TRUE MONTANA** | Even as Great Falls grows and changes, the city continues to offer a classic Montana experience that many residents feel has been lost by other cities in the state. This authentic experience is a significant draw for former Great Falls residents, for other Montanans, and anyone with nostalgic connections to the state.
- **I-15** | Montana and other western mountain state/province residents are accustomed to driving long distances. Many potential visitors travel up and down the I-15 corridor, which runs right through Great Falls. Roughly 2 million visitors drove through Great Falls last year, however, only 44% spend a night. Promotion of the city and events to these travelers could increase visitation and overnight stays.
- **COMMUNITY** | Government, the business community, and residents alike need to internalize and reflect a new optimistic spirit about the city. A cohesive and authentic identity based on Great Falls' real and growing assets can inspire community pride that is shared with visitors and even competing cities.
- **AIRPORT** | While direct flights to Great Falls are not a differentiator from other Montana cities, the presence of an international airport is a strong asset. The airport and its attractions should be promoted both in the airport itself and in the airports that have direct connections.

Threats

- **SKEPTICISMS** | Residents can undermine new positioning and investments for new visitors if they are not properly engaged. To a large extent, this is already true today.

- **CANADIAN DOLLAR** | Poor exchange rates for Canadian tourists suppress visitation and spending in Great Falls.
- **MISALIGNMENT** | Great Falls Montana Tourism should avoid the temptation to position the city as the “gateway to Glacier” or anything that sets up a misaligned expectation about a mountain city. Great Falls’ distant mountain views are only difficult to appreciate for people that expect close-up mountain access.

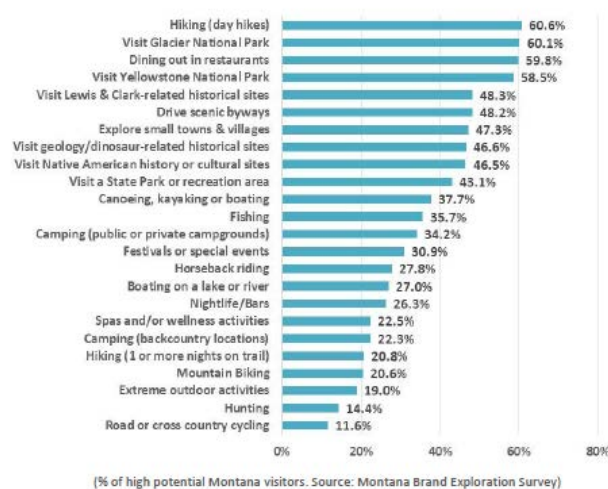
Message Focus

An authentic Montana experience is highly valued by many residents inside the state and beyond. Over the past two decades as all Montana cities have experienced significant growth, Great Falls has retained the true Montana character. Tourists can access this experience along with the modern amenities found in Great Falls today and use the city as a jumping-off point for excursions into Central and Western Montana, and even the Southern Canadian Rockies.

Great Falls, Montana is truly designed for independent, outdoor adventurers and planners of meetings looking for a true, authentic Montana experience. Great Falls is located on the Missouri River in the heart of Montana and provides a basecamp for a wide range of outdoor adventures and offers a haven of rich arts, culture, and history in a vibrant, modern community where an expansive, unspoiled, diverse landscape renews one’s spirit.

Visitors to Montana have an extensive list of desired activities they would participate in on a trip to Montana. Taken from the research conducted by Destination Analyst’s 2016 Brand Study, below is a list of desired activities.

Desired Activities on a Montana Trip



Great Falls, Montana is a basecamp to the Bob Marshall Wilderness, a day hike paradise, as well as the Big Belt Mountains, Highwood Mountains, and Little Belt Mountains. Great Falls Montana Tourism launched Great Falls Montana Restaurant

Week in February to showcase the variety, quality and localness of our food scene. Our community is roughly 2.5 hours to Glacier National Park's East Entrance and home to the Lewis & Clark Interpretive Center, which has North America's Most Extensive display of the entire Lewis & Clark Expedition. Central Montana Tourism Region has developed 10 wonderful motorcycle rides and has provided the content of six of those rides to Great Falls, Montana to use to promote not just motorcycle rides, but all scenic drives that explore our small towns and use Great Falls, Montana as a basecamp. First Peoples Buffalo Jump State Park and National Historic Landmark, provides genuine insight to our first people's independent spirit, and is minutes from Great Falls. Giant Springs State Park, in Great Falls, is the State's most visited State Park and is home to the world's largest natural spring, flowing at 156 million gallons of water per day into the Missouri River, which runs through Great Falls, providing quick and easy access for kayaking, canoeing, boating, and fishing. This is the beginning of what Great Falls, Montana offers.

To experience Great Falls, is to experience Montana and our marketing focuses on what visitors to Montana want to do and what visitors to Great Falls have consistently done. According to the Institute of Tourism and Recreation Research's Annual Visitor Survey, the top 5 activities stay consistent each year.

Top 5 Activities

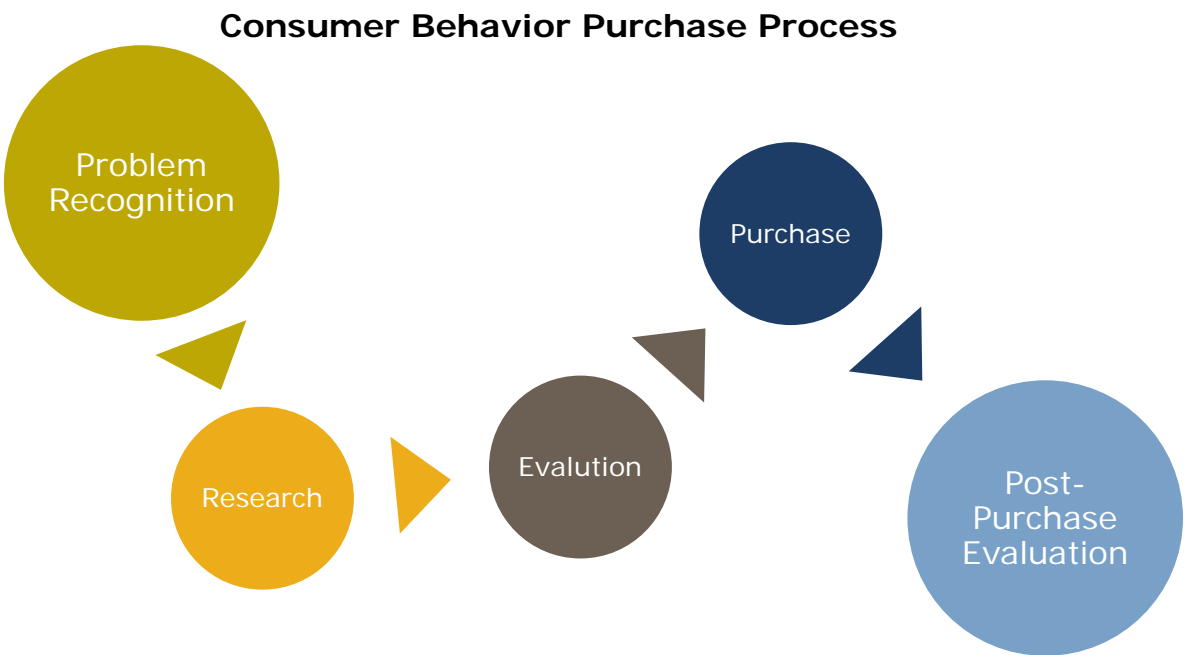
Year	Activity	%	Activity	%	Activity	%	Activity	%	Activity	%
2017	Scenic Driving	51	Day Hiking	29	Nature Photography	28	Camping	25	Lewis & Clark Sites	25
2016	Scenic Driving	59	Day Hiking	33	Nature Photography	33	Camping	29	Shopping	28
2015	Scenic Driving	60	Nature Photography	32	Shopping	31	Lewis & Clark Sites	31	Day Hiking	30
2014	Scenic Driving	61	Shopping	38	Nature Photography	29	Day Hiking	27	Camping	27
2013	Scenic Driving	69	Shopping	42	Historical Sites	32	Day Hiking	30	Wildlife Watching	29
2012	Scenic Driving	66	Nature Photography	35	Shopping	33	Lewis & Clark Sites	28	Historical Sites	27

Along with this, and the entire Destination Analysts research completed in October 2016 for the State of Montana, we see Great Falls' ability to capitalize on State strategies, and messaging, with our current market of Family and History Buffs as well as our emerging market of Single Income/Double Income No Kids.

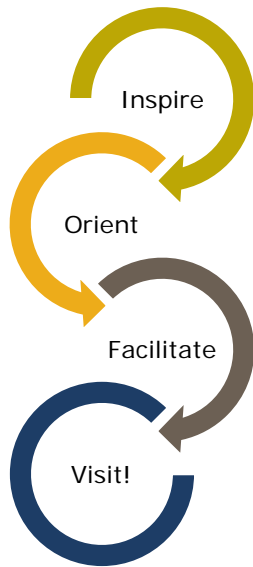
The Great Falls emerging market is 34-year-old and younger, a segment that is trending nationally, and that we saw 19% of last year. Great Falls Montana Tourism continues to build assets that are designed to attract them to Great Falls

for authentic experiences that contain a unique mix of outdoor and cultural experiences, focusing on our strengths.

While the State of Montana will work to inspire and orient with their marketing message, Great Falls Montana Tourism will focus on refinement of the inspiration and orientation to Great Falls and facilitation of experiences through our strategies. Throughout our Marketing Strategies, we develop messages that follow the consumer behavior purchase process using a formula that will inspire them to choose Great Falls.



Anytime a purchase occurs, it requires dissatisfaction, in its broadest form. For travel decisions, the dissatisfaction is either too much work and the need for a break, an experience that hasn't been had, or peers having an experience you want to be able to be included in. Once the potential visitor has determined they are going to travel, they begin researching where to go, what to do, and what experiences to have. This is where our efforts to inspire and orient begin and where peer influencers can be helpful, by also sharing inspiration. Studies show consumers are 85% more likely to act based on a recommendation of a peer, or a friend of a peer than any paid media.

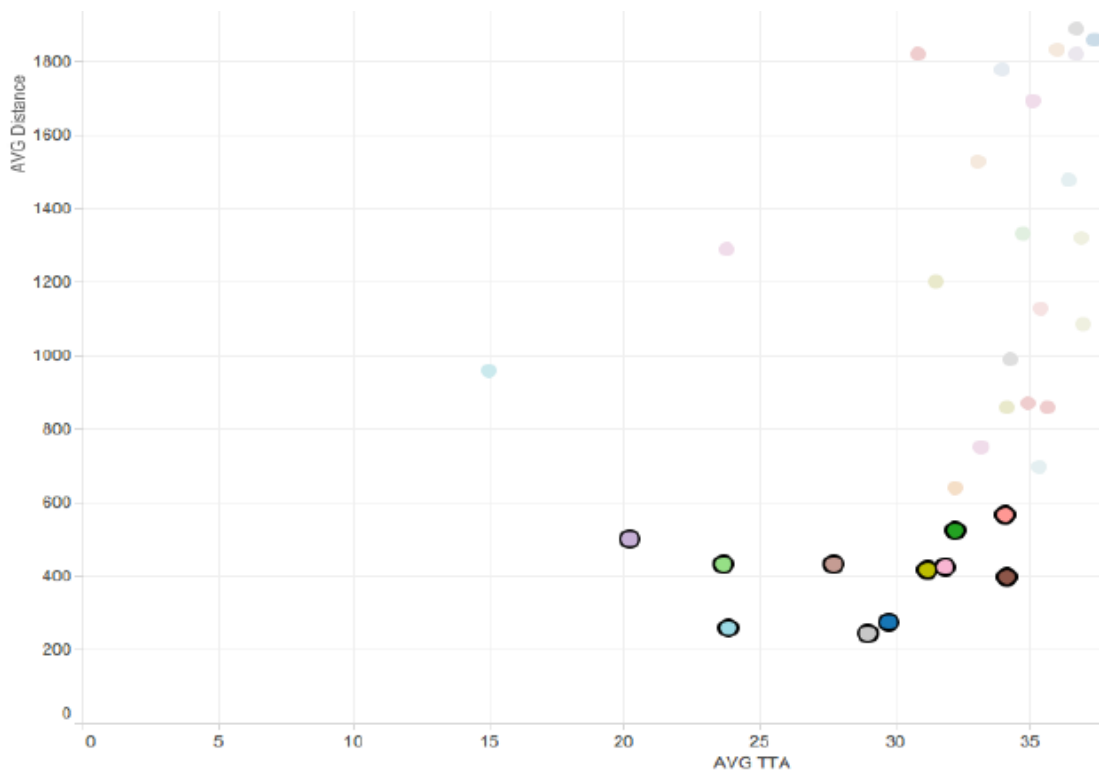


During the evaluation stage, consumers are working to find one option over another. This is when we begin to orient them on how to get to Great Falls, where they can stay, and facilitate the experience they can have to have. Done correctly, the purchase phase occurs and the visit to Great Falls occurs. After the visit to Great Falls, an evaluation of the purchase occurs – and Great Falls consistently delivers on the expectations it sets, and the consumer is satisfied and makes a second trip to Great Falls, as research shows 78% of people coming to Great Falls have been here before.

Knowing what activities visitors like to experience, how they make decisions, and how to help influence the decisions at each stage is cornerstone to Great Falls

Montana Tourism’s Marketing Strategies, both for the Leisure and Business market segments.

Timing of message is critical. Through the State of Montana Department of Commerce’s Office of Tourism and Business Development Arrivalist data, we know that our leisure drive market [within 600 miles] arrive within 35 days of connecting with a marketing message. This provides a smaller lead time to deliver a message to produce results with our leisure traveler strategy.



The business segment is planning now for conventions and meetings in 2020 and beyond, with decisions occurring year-round, based on the industry segment.

Objectives

Our core objectives through our marketing efforts are driven by Great Falls Montana Tourism's Vision to strengthen the Great Falls Montana economy by being the preferred choice for a genuine Montana experience.

Objective 1 | Increase awareness of Great Falls, Montana as a tourism destination for leisure travelers to visit by personal vehicle, using Montana's Basecamp for Art & Adventure message.

Objective 2 | Promote established and new signature events to leisure travelers in drive markets from 150 – 600 miles from Great Falls, Montana. Use established and new signature events as bleisure travel opportunities with meeting planners.

Objective 3 | Increase awareness of Great Falls, Montana as a tourism destination for leisure travelers to visit by air, using Montana's Basecamp for Art & Adventure message.

Objective 4 | Increase awareness of Great Falls, Montana with meeting planners as a destination for 300-900 room night meetings looking for the affordable and convenient genuine Montana experience: hiking, biking, fly fishing, outdoor excursions at parks, and natural attractions, dining, breweries, historic attractions and museums.

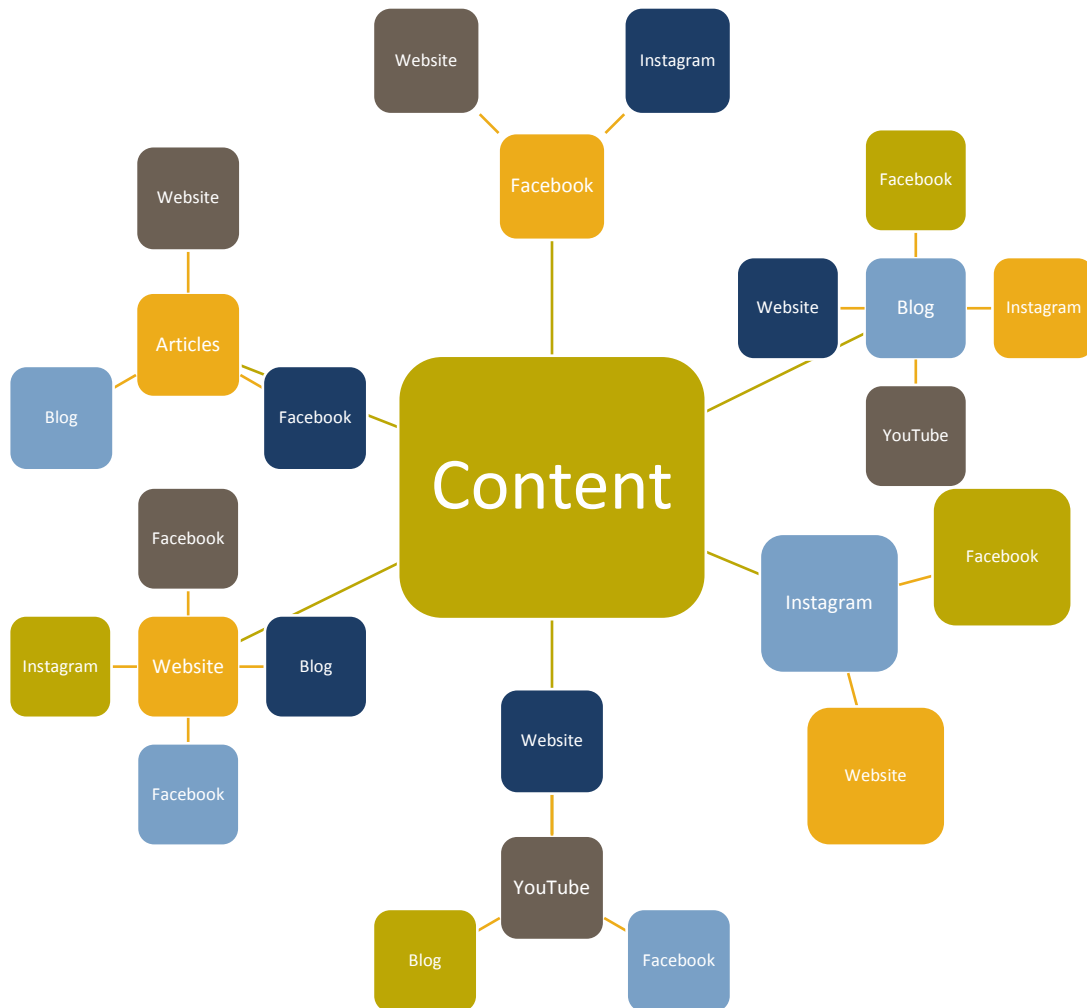
Objective 5 | Support local entrepreneurs who look to create more tourist-centric activities and attractions, based on strategic needs, that strengthen Great Falls' marketability as a destination.

Objective 6 | Increase October-May travel through meeting planners and leisure travelers.

Leisure Traveler Strategy

Great Falls Montana Tourism's leisure strategy is steeped in developing appropriate content for our market segments that will cross-populate media channels to facilitate a decision to visit Great Falls, Montana.

Content Sharing Matrix



With Great Falls Montana Tourism’s limited, and declining budget, the content we develop is leveraged on multiple platforms, to encourage engagement and can mostly be done by our current team. Great Falls Montana Tourism uses developed content in the following strategies:

- Adventure Awaits Emails | Delivered to our email database of inquiries approximately 6 times a year, with each email delivered no less than 35 days prior to season changes, signature events and start of desired activities.
- Basecamp Blog | Weekly stories about all the is Great Falls, Montana. The annual schedule of blog topics and posting consider holidays and events in the next 40 days, activities available by season, unique features, new experiences, and tips of how to make the most of a trip to Great Falls.
- Facebook | Posts are strategically planned weekly throughout the year, considering the market the post is directed to. The Great Falls Montana

Tourism Facebook market is: 56 years old and older, female and from Canada. Posts look to encourage engagement to connect with visitors planning trips to Montana. A mix of posts that share Tourism developed content, news, feature local businesses, landscape images, recreational amenities, and events. Posts will balance information transfer for sharing and question asking for comments.

- Instagram | A photo rich site dominated mostly by 35-year olds and younger has high engagement, however, a posting should occur at minimum, daily. Fresh and different content is essential across platforms. Posts should be relative to other content posting and drive traffic to deeper engagement opportunities.
- YouTube | The photo is good, but a full video that shows the entire story is better. Great Falls Montana Tourism will look to add video content from Champions as well as produced paid content that reinforce the unique assets of Great Falls as Montana's Basecamp for Art & Adventure.
- VisitGreatFallsMontana.org | Increasing content related to top activities and increased interests is essential for the growth of the website. Dedicated pages to information and resources along with quality images and videos help inspire, orient and facilitate visitors.

Joint Ventures

Great Falls Montana Tourism has greatly appreciated previous joint ventures with the Office of Tourism and Business Development, Central Montana, and Great Falls International Airport. These joint ventures strategically leverage our limited budget and will continue to be staples in our leisure traveler strategy. Great Falls Montana Tourism will take advantage of joint ventures that fit with our market, strategy and message focus.

Trade Shows

Great Falls Montana Tourism will attend the Calgary Outdoor Adventure and Travel Show in March 2019, the Calgary Women's Show in October 2019 and the Denver International Sportsmen's Expo in January 2019. These shows provide an opportunity to hear from the market about their interests and share the Great Falls, Montana story.

Media Placement

Great Falls Montana Tourism is strategically focused on continually increasing the investment in paid media placement. The landscape for paid media placement is extremely competitive and increasingly saturated with competitor messages. With a limited budget, compared to our competitors, Great Falls will continue to place higher value on digital placement than print; and higher value on digital placement that drives traffic to focused content. Our strategic approach to leveraging partner placements to further the Basecamp message will continue, looking at the media

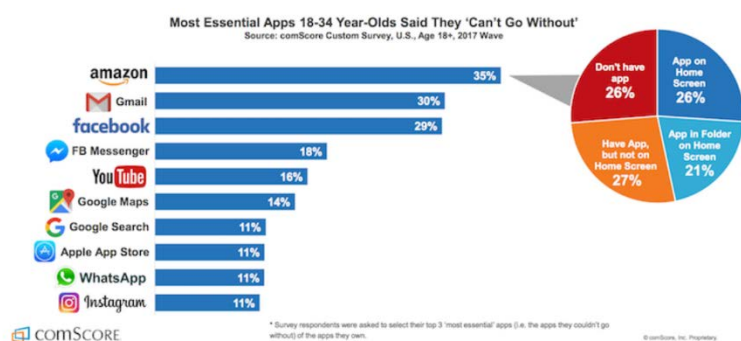
placed by our partners and either placing additional media or allowing their placement to stand alone so our investment can be placed elsewhere.

Events

Great Falls plays host to a great number of wonderful events, however, Great Falls Montana Tourism is directly involved with two; Western Art Week, a staple to our community, and our newest effort, Great Falls Montana Restaurant Week – Montana's Biggest. Great Falls Montana Tourism will continue an investment to support these key events as well as make investments to develop new signature events that support our strategic priorities. Specific to Western Art Week in 2019, Great Falls Montana Tourism will provide stipends for temporary staff to collect surveys during Western Art Week to determine the economic impact of the event.

Visit Great Falls App

The Visit Great Falls App was developed in support of our strategic priority to be prepared for the next generation of leisure travelers. 18-24 year old are the highest user of apps, spending 93.5 hours each month on smartphone apps. The app this group uses the most is Amazon and uses 9 apps total throughout any



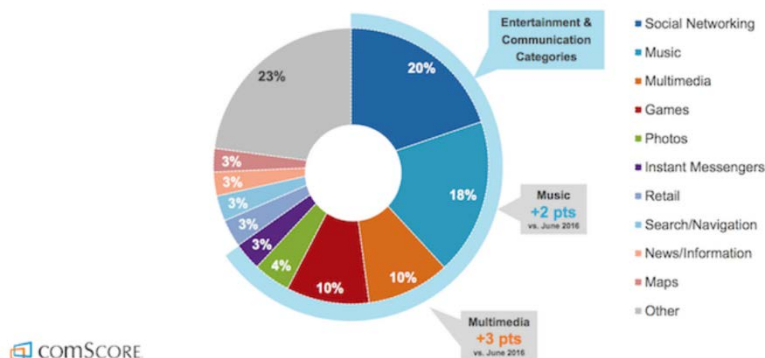
Source: [comScore](#)

given day. In a month, this group uses 30 different apps. This is a relatively new media, and we know the current Visit Great Falls App is used to find out about events. People do rely on a handful of apps and uninstall apps regularly because they don't use them anymore. Great Falls Montana Tourism is new to apps, however, being able to grow with the emerging travel market is

key. Our efforts will continue to evolve as we watch how Visit Great Falls App is used and the trends of apps are followed.

Great Falls Montana Tourism utilizes the app to support signature events and conventions and will continue to leverage the platform to support and grow our tourism effort. Investments will be made to improve the app to match the uses of apps to the

Share of Mobile App Category Time Spent



Source: [comScore](#)

market that uses them and the objectives of Great Falls Montana Tourism's overall marketing strategy.

Montana's Basecamp Visitor Magazine

The historic large format content pieces Great Falls Montana Tourism has developed have been successful. This content has increased traffic to our website and engaged readers for over 5 minutes. These impressive results, along with the continued decline in requests for visitor guides, and ever increasing mobile website usage, Great Falls Montana Tourism is going to develop a content rich online magazine that will have stories about day hikes, scenic drives, historic sites, and other topics that we know, based on previous visitor's activities, our visitors are interested in. This easy read, content heavy magazine will serve to inspire and facilitate visitors and provide support to other marketing strategies.

Photo & Video Library

Great Falls Montana Tourism, through Facebook, our website and Instagram can easily use 580 emotion evoking images each year along with various length videos. We will continue to source photos and videos through photo and video solicitations, staged photo shoots, hired photo and video productions and Great Falls Champions.

Great Falls Champions

This effort is driven by two elements: 78% of visitors have been to Great Falls before AND consumers are 85% more likely to act based on a recommendation of a friend, or a friend of a friend than any paid media. This effort has multiple components and will grow and evolve each year. The current phase of implementation will include securing Great Falls Champions that will be advocates for our community and who will utilize a web-based platform to easily share our content through their social channels. Our efforts will continue to get more formalized, with commitments from Champions to share blog content, photos, videos, and volunteering for strategic efforts. The initial Champions effort includes education through Great Falls College MSU to ensure our Champions are fully prepared to share Great Falls' story.

MAFB Welcome to Great Falls | Montana's Basecamp for Art & Adventure

Great Falls Montana Tourism staff has worked with Malmstrom Air Force Base leadership and committed to provide regularly scheduled presentations to service personnel new to Base. These presentations will:

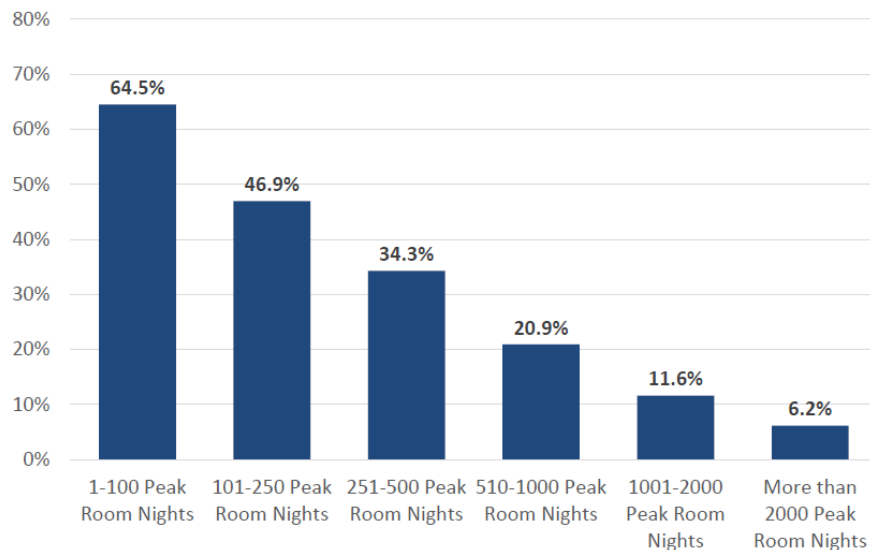
1. Educate new personnel about what Great Falls has to offer
2. Encourage those newly stationed to experience Great Falls
3. Share what resources are available to have a Great Falls experience
4. Ask them to invite friends and family to Great Falls

Business Traveler Strategy

Great Falls Montana Tourism is relatively new to the Convention and Meeting effort. However, plan to continue to make a balanced investment in research, building relationships and incentivizing the right projects. Our focus for the collective business traveler is two-fold. The first is to secure multi-property filling conventions and meetings. The second is to promote the leisure opportunities available to the meeting planners, and attendees to the conventions and meetings to turn the business traveler into a bleisure traveler and to bring the attendee back, with their family, for a leisure trip.

Meeting Planner Message

The majority of meetings nationally produce 250 room nights on peak or less, according to 2017 Destination Analyst research.

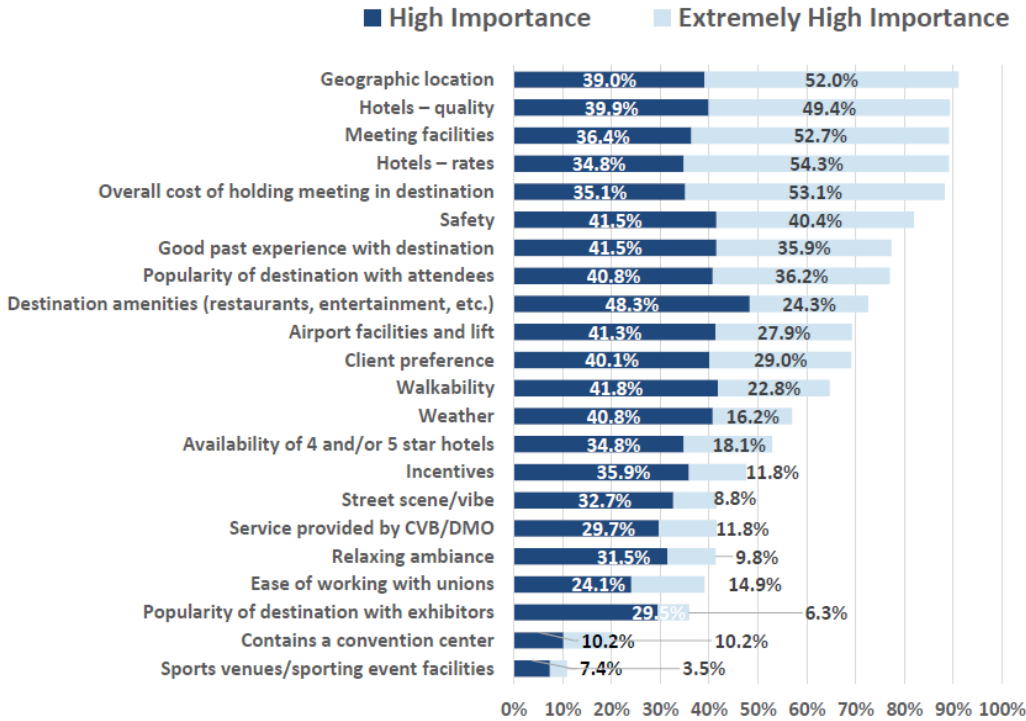


That same Destination Analyst research indicates the meeting planners top 5 success factors include attendee satisfaction, Number of Attendee Registrations and staying in budget.



With a very large industry, delivering a message that cuts through the clutter is essential. Our efforts are focused on ensuring planners are successful. The content delivered to meeting planners is focused on the top 5 success factors and education on decision drivers. Great Falls Montana Tourism knows that geographic location, quality and rates of hotels, types and availability of meeting facilities and budgets, are key drivers in choosing a location.

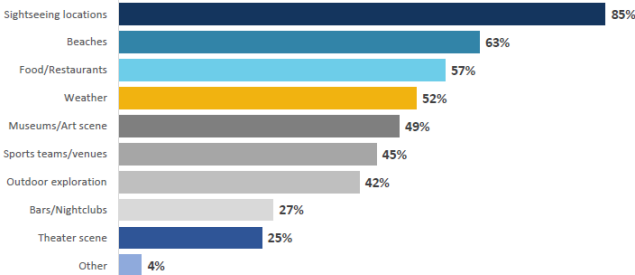
Factors that Drive Location Decision



Passing on a given location is primarily driven by budget.

Bleisure travelers are business travelers that add on to their trip for leisure. Research from Expedia Media Solutions indicates 43% of business travelers will add leisure, equal to the number of days of the business travel. Factors that influence the bleisure decision include sightseeing locations, museums/art scene and outdoor exploration.

Factors Influencing Bleisure Decision



Meeting Planner Monthly Email

Great Falls Montana Tourism will continue to send a monthly meeting planner email to our database of meeting planners. The database is a complete list of meeting planners we have met with at tradeshow and meeting planner events, meeting planners we have worked with in the past, and new meeting planners we have prospected through Empowermint+ or independent research. Through our collective strategic efforts in the Business Traveler segment, the database continues to grow.

The email a regular follow up with meeting planners to reinforce the Great Falls Montana message to educate and inform planners of Great Falls' capacity, venues, hotels, past business case studies, and services provided by Great Falls Montana Tourism. Highlights include information about familiarization trip opportunities, new announced projects that are industry specific, and upcoming bleisure opportunity events. An emphasis is always placed on Great Falls Montana Tourism's acceptance of open request for proposals.

Meeting Planner Networking Events

These opportunities provide Great Falls, Montana face-to-face conversations with meeting planners who are looking to book business for clients in the west or northwest region. During the networking events, our team has the ability to visit with meeting planners about current and future request for proposal specifications, business needs for the next 3-5 years and how Great Falls can meet the needs they have during a set appointment. Previously, Great Falls Montana Tourism has attended Networking Events offered through:

- Connect
- IMEX
- Smart Meetings
- Montana Society of Association Executives

with good success. The key to making the previous and current investments produce results in consistency. Attending, meeting, networking and follow-up communication introduces Great Falls and continues to reinforce our unique opportunities and competitive advantages. Great Falls Montana Tourism will participate in four meeting planner events during FY 19 through Connect, Smart Meetings, Small Market Meetings, and Montana Society of Association Executives. Each provider gathers and hosts meeting planners differently, helping to diversify our lead profile. More preference will be provided to events that focus on planners planning in the northwest region that have agriculture, history, outdoor or adventure industry

Impact Incentives

Great Falls Montana Tourism has a strong pipeline of high priority leads. The ability to incentivize our location based on impact helps land deals. There are a

few different ways to provide incentives through the proposal process. Incentives can include:

- Tourism Team Time for a specific Task
- Added Value through App modules
- Fundraising Assistance
- Coordination of a dignitary's attendance
- Cash

New for FY19, Great Falls Montana Tourism will utilize a formula to provide for Impact Incentives to respond quickly during the proposal stage. These incentives would be provided to open and viable requests for proposals based on the following formula:

estimated total event attendance X current average value of one overnight visitor

X total # of days in Great Falls X 2% = Maximum Impact Incentive

An example of this formula using the 2020 Montana Governor's Conference on Tourism.

400 people x each spending on average \$270 x for 3 days x 2% = \$6,480

The impact incentives would be used to produce immediate results on high impact opportunities and let meeting planners know Great Falls Montana Tourism is ready for their business.

Recruitment Incentives

Great Falls Montana Tourism's sales strategy includes having branded items to use as gifts, giveaways or support materials to be used at trade shows, meeting planner events, and exhibition events. Recruitment incentive materials will include items such as logoed pens, notepads, banners, flyers, and trade show displays. This investment also includes attending events, meetings, or trade shows to make connections and strengthen existing relationships with planners of meetings or potential future business.

Familiarization Trips

The goal of a familiarization trip is to invite meeting planners with open and viable requests for proposals to Great Falls for a hands-on experience of our venues, hotels, and attractions. Familiarization trips help the meeting planner see the possibilities of hosting their event in Great Falls, build strong relationships between our Great Falls Team and the meeting planner. The Tourism Team will build an inclusive itinerary that focuses on the needs of the RFP and considers the market

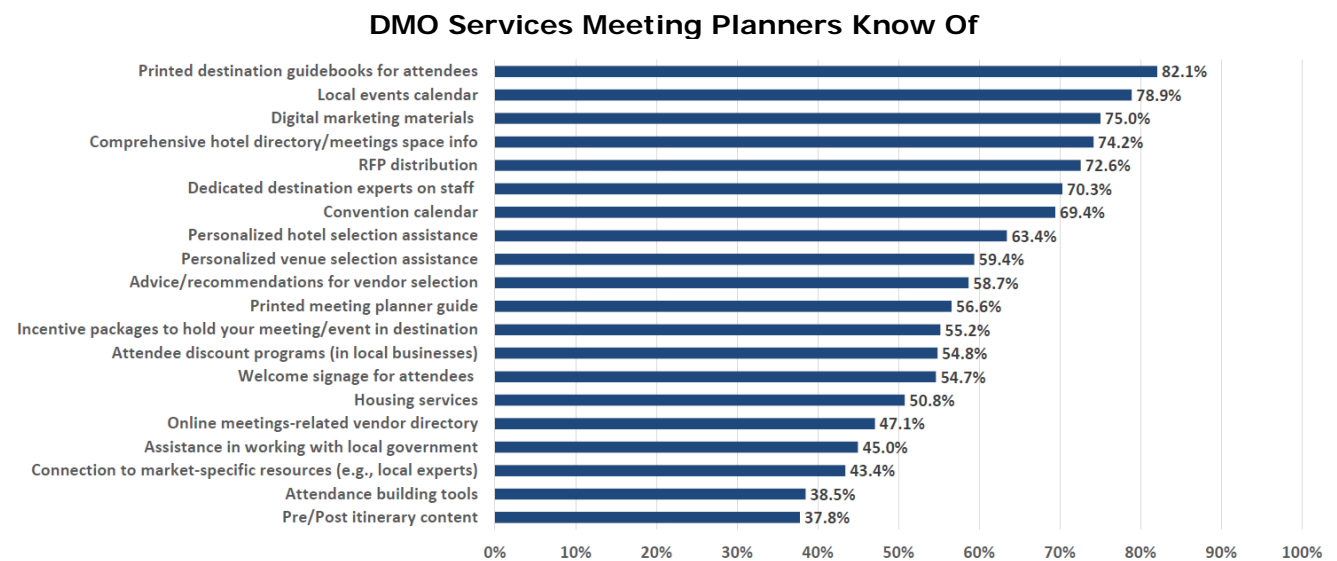
segment that the meeting planner serves. (ie. Agriculture, military, outdoors, etc.) We will invite meeting planners with RFPs servicing 300-900 room night clients. This opportunity will be provided strategically to meeting planners that Great Falls Montana Tourism has vetted that have a highest probability of bringing new business to Great Falls, Montana.

Local Outreach

Great Falls Montana Tourism knows our local community has amazing leadership that is well connected throughout their respective industries regionally and nationally. Our Tourism Team will continue to deliver Bring it to the Basecamp outreach to local business leaders, civic clubs, and networking groups. This outreach focuses on getting individuals to look at their personal network – both business and social to provide leads for Great Falls Montana Tourism to follow.

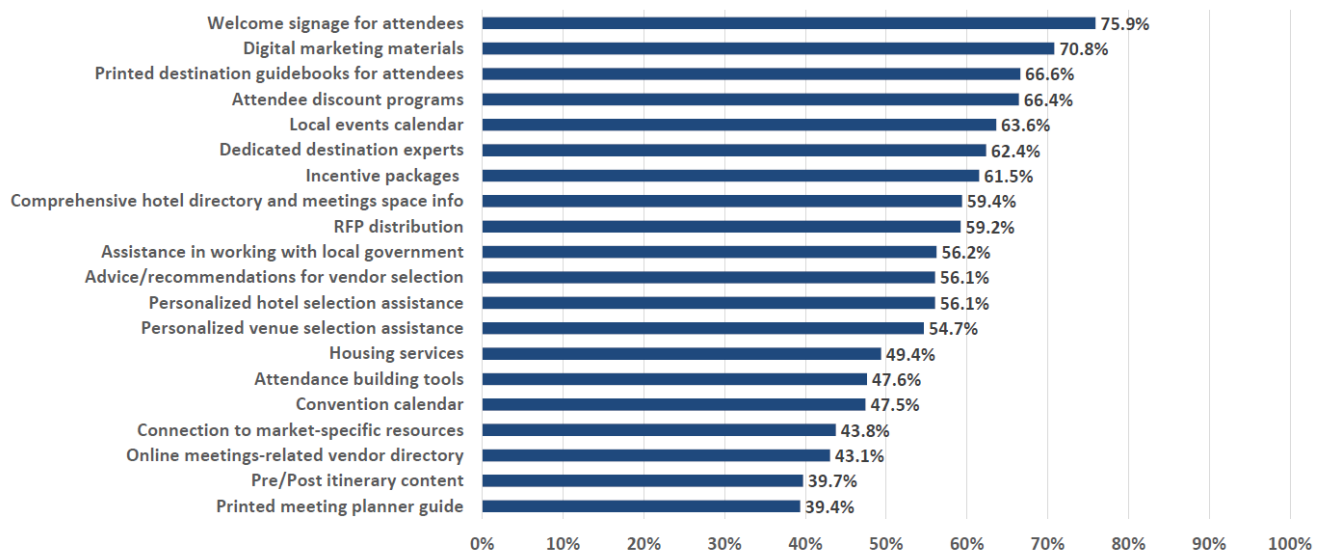
Development of Services

As we look to compete regionally and nationally, Great Falls Montana Tourism will continue to take strategic steps to develop the DMO Services that meeting planners desire, use and need.



Great Falls Montana Tourism currently has capabilities in these core services. With our Visit Great Falls App, newly implemented incentive plans, and attendance building work, Great Falls is working to position itself with the services meeting planners want to use.

DMO Resources Meeting Planners Want to Use



Focus on the Future

Great Falls Montana Tourism is making the commitment to stay focused on implementing and refining our strategic marketing plan, refining operations, and preparing for growth. Our time is limited and best spent on producing high-impact results for Great Falls.

In the past two years, Great Falls Montana Tourism has:

1. Strategically aligned the City of Great Falls' Tourism efforts
2. Adopted one 5-year Strategic Plan
3. Hired an Executive Director, Business Development Director and Tourism Assistant to further its efforts
4. Developed internal operational systems and processes
5. Secured Customer Relationship Management systems
6. Started email distribution to consolidated inquiry lists
7. Created a blog
8. Launched a Tourism website, www.VisitGreatFallsMontana.org
9. Established an Instagram and YouTube presence
10. Established a Great Falls Montana Tourism Marketing Strategy
11. Consolidated all Great Falls Montana Tourism efforts into one location
12. Developed and launched the first version of Visit Great Falls App
13. Began Certified Destination Management Executive Certification
14. Continue to assess and develop plan to improve Montana ExpoPark
15. Created a NEW signature event

Great Falls Montana Tourism will work to ensure our current efforts produce results so that in the future, our organization can:

- Create broader City of Great Falls tourism content for top-performing planning and booking sites, including TripAdvisor and other travel websites about area attractions, shopping, restaurants, outdoor recreational destinations, and events.
- Establish Great Falls Montana Tourism as an industry leading Destination Management Organization
- Grow capabilities of Convention and Meeting services to meet meeting planner needs
- Provide ongoing education to restaurants, hotels, and retail businesses to solicit Yelp and Google reviews of their businesses
- Encourage restaurants, hotels, and retail businesses to establish and maintain their digital reputation by respectfully replying to critiques and leverage the feedback to improve services and overall facilities
- Support Great Falls, Montana workforce recruitment efforts
- Identify gaps in Great Falls, Montana's destination experience and support the development of efforts to fill those gaps
- Strategically approach recruitment of Sporting Events into Great Falls
- Increase investment and develop innovate approaches in opportunities that meet our strategic objectives to grow non-peak visitation; develop and grow the pipeline; celebrate, support and create assets; build Great Falls; and develop and retain talent

Key Performance Indicators

Great Falls Montana Tourism uses a performance dashboard that focuses our efforts on the key performance indicators that determine if marketing efforts are on track to meet strategic objectives. Our FY18 indicators and performance are below, with one quarter left in the Fiscal Year.

Demonstrate Operational Excellence		Previous Year
Increase Occupancy Year to Date 1.5%	0.4%	57.70%
Increase Annual Room Demand 1.5%	-1.0%	461,832
Increase Annual RevPAR 4%	4.5%	3%
Renew Tourism Business Improvement District	Renewed!	NA
Build Team Great Falls		
Increase attendance at Signature Events		NA
Increase traffic through GTF 2%	-41%	-6%
Launch Great Falls Champions Program	25%	10%
Grow Shoulder & Off-Peak Visitation		
Secure 4 NEW Business Travel Commitments	1	0
Celebrate, Support & Create Assets		
Launch Great Falls App	Launched!	NA
Complete ExpoPark Study	75%	NA
Develop & Grow the Tourism Pipeline		
Increase Facebook engagement to 13,200	25,230	NA
Deliver 6 Great Adventure Updates to Inquiries	3	4

Establish 80,000 website unique visitors	64,312	90,091
Establish 1,500 Instagram followers	699	339
Deliver 52 engaging blog posts	36	NA
Increase non-resident Visitors who spent one night 5%	-52%	44%
as of		31-Mar-18

Great Falls Montana Tourism saw success mixed with some areas still needing focus. Limited marketing investment during the organizational development of Great Falls Montana Tourism, coupled with a soft Alberta economy, development of a Business Development Director, slow ag economy, a larger than normal fire season, and larger investments by peer cities in marketing combined to negatively impact some of our results.

With two new lodging properties, increased investment in leisure media placement, a completed Montana ExpoPark vision and strategy, and a strong effort with meeting planners, Great Falls Montana Tourism will stay stingy with our time and committed on implementing and refining our strategic marketing plan, refining operations, and preparing for growth to produce high-impact results for Great Falls, Montana.

In Fiscal Year 19, Great Falls Montana Tourism will look to:

1. Increase Occupancy Year to Date 1.5%
2. Increase Annual Room Demand 1.5%
3. Increase Annual RevPAR 6%
4. Increase participation in Great Falls Montana Restaurant Week
5. Launch another NEW Fall signature event
6. Increase Room Demand During Western Art Week
7. Increase traffic through GTF 5%
8. Secure 4 NEW Meeting and Convention Commitments
9. Increase non-resident Visitors who spent one night 5%
10. Deliver 26 engaging, social-share-worthy, blog posts
11. Establish 1,500 Instagram followers