



MAY 2023

VISIT **BOZEMAN**

# TOURISM UPDATE



PROVIDED BY **PRIME**

# TOURISM'S IMPACT

• **2022 STATE OF MONTANA**  
NONRESIDENT VISITORS SPENT  
AN ESTIMATED \$5.8 BILLION – UP  
13% OVER 2021

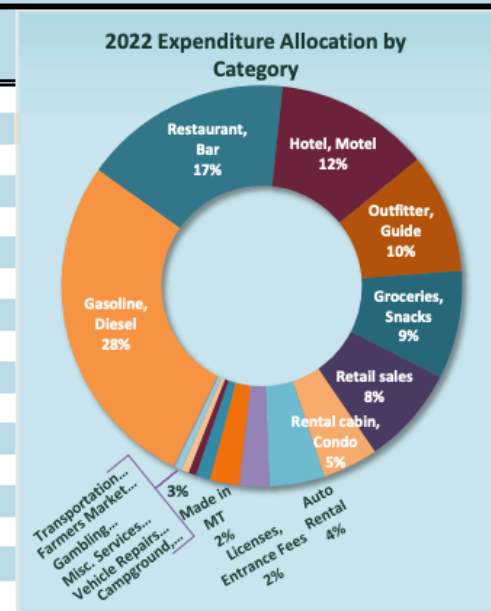
• **2022 BOZEMAN AIRPORT**  
44% OF STATE'S DEBORDINGS

• **2022 YELLOWSTONE COUNTRY**  
38% OF STATE'S BED TAX  
COLLECTIONS

- BIG SKY #1 - \$7.1M
- BOZEMAN #2 - \$5.3M

Table 1 - 2022 Nonresident Traveler Expenditures<sup>1</sup>

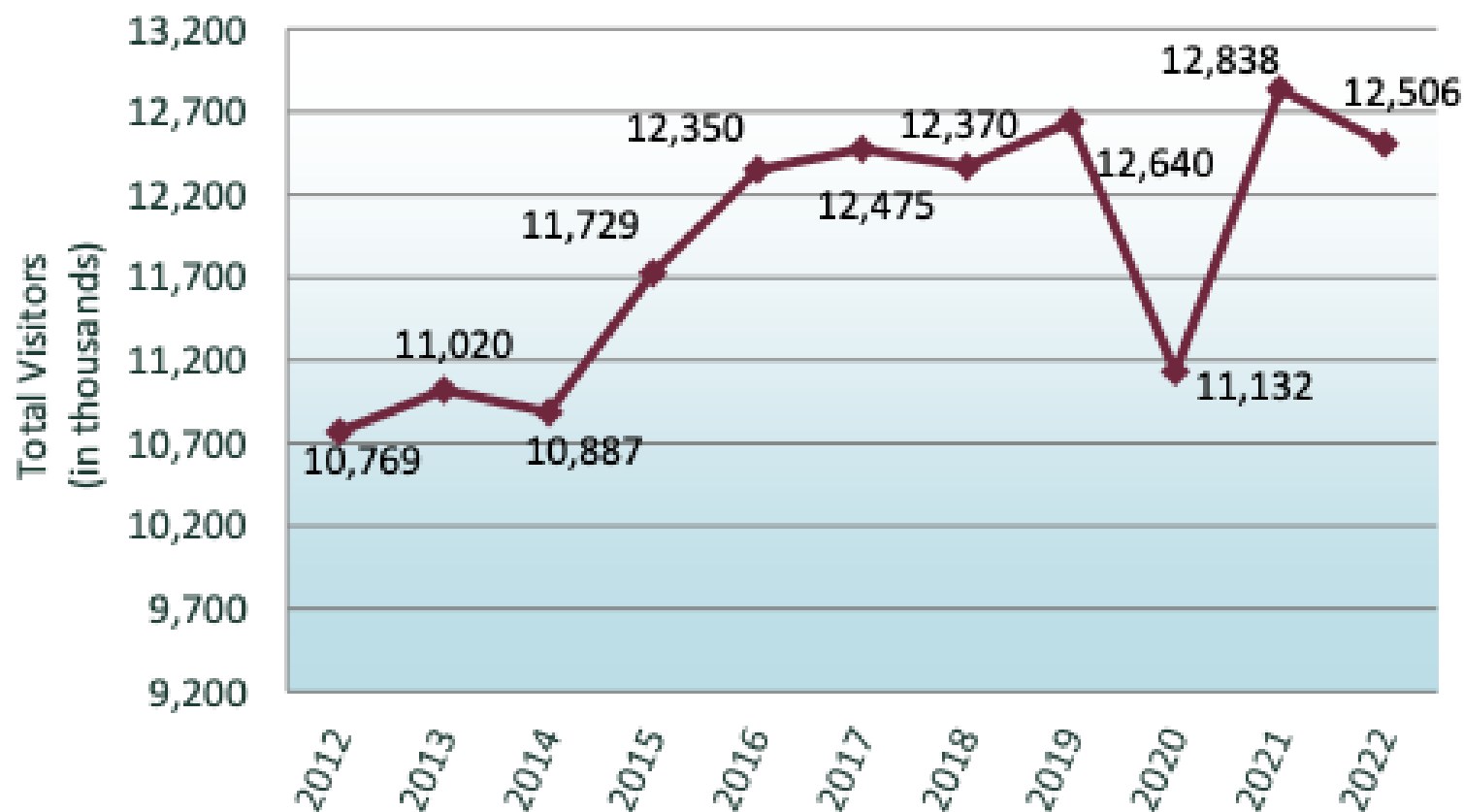
Expenditure Category	Average Daily Per Group <sup>2,3</sup>	Allocation by Category	Total Expenditures <sup>2,4</sup>
Gasoline, Diesel	\$57.18	28%	\$1,606,110,000
Restaurant, Bar	\$34.89	17%	\$979,290,000
Hotel, Motel	\$26.14	12%	\$726,690,000
Outfitter, Guide	\$20.01	10%	\$560,020,000
Groceries, Snacks	\$18.09	9%	\$506,460,000
Retail sales	\$16.44	8%	\$462,250,000
Rental cabin, Condo	\$9.38	5%	\$262,090,000
Auto Rental	\$9.24	4%	\$257,630,000
Licenses, Entrance Fees	\$4.93	2%	\$137,520,000
Made in MT	\$4.92	2%	\$68,830,000
Campground, RV Park	\$2.44	1%	\$67,690,000
Vehicle Repairs	\$1.29	1%	\$36,380,000
Misc. Services	\$1.29	1%	\$35,200,000
Gambling	\$1.15	1%	\$32,380,000
Farmers Market	\$0.19	<1%	\$5,330,000
Transportation Fares	\$0.02	<1%	\$610,000
<b>Estimated Total</b>	<b>\$207.61</b>		<b>\$5,816,310,000</b>



\* DATA PROVIDED BY INSTITUTE FOR TOURISM & RECREATION RESEARCH – U of M

# TOURISM TRENDS

## Nonresident Visitors



\* DATA PROVIDED BY INSTITUTE FOR TOURISM & RECREATION RESEARCH – U of M

# YELLOWSTONE FLOODS





# YELLOWSTONE FLOODS



United States

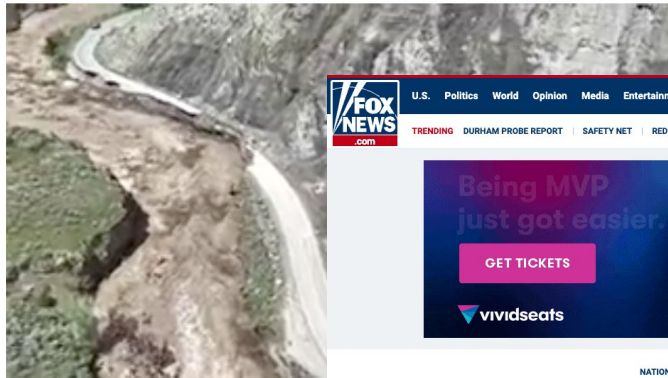


3 minute read · June 14, 2022 10:43 AM MDT · Last Updated a year ago



## Yellowstone closed for first time in 34 years amid flooding, mudslides

By Ruffin Prevost



travel

Destinations

Food & Drink

News

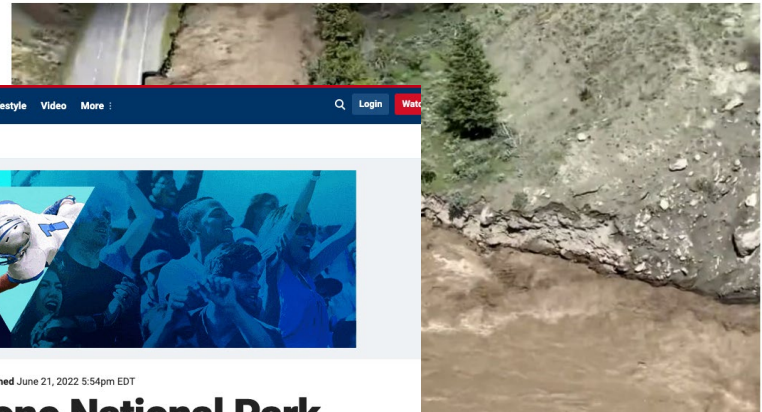
Stay

Video

## All entrances to Yellowstone National Park are temporarily closed due to 'extremely hazardous conditions'

By Claudia Dominguez and Sara Smart, CNN

Updated 10:24 PM EDT, Mon June 13, 2022



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TRENDING DURHAM PROBE REPORT SAFETY NET RED ALERT AI

Being MVP  
just got easier.

GET TICKETS

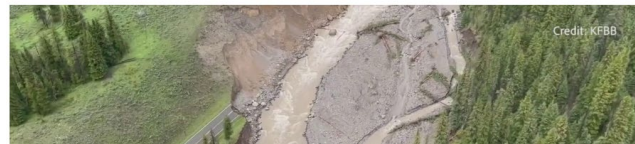
vividseats

NATIONAL PARKS · Published June 21, 2022 5:54pm EDT

## Why is Yellowstone National Park closed?

Yellowstone National park is set to reopen after unprecedented floods

By Phillip Nieto | Fox News



Credit: KFBH



# 2022 BED TAX COLLECTIONS

Q3 - GARDINER: **-91%**

Q4 - GARDINER: **-65%**

Q2 - GARDINER: **-40%**

Q2 - RED LODGE: **-35%**

Q3 - RED LODGE: **-24%**

Q2 - LIVINGSTON: **-19%**

Q2 - WEST YELLOWSTONE: **-19%**

Q3 - WEST YELLOWSTONE: **-17%**

Q3 - LIVINGSTON: **-13%**

Q1 - BOZEMAN: **+63%**

Q2 - BOZEMAN: **+19%**

Q3 - BOZEMAN: **+7%**

Q4 - BOZEMAN: **+12%**

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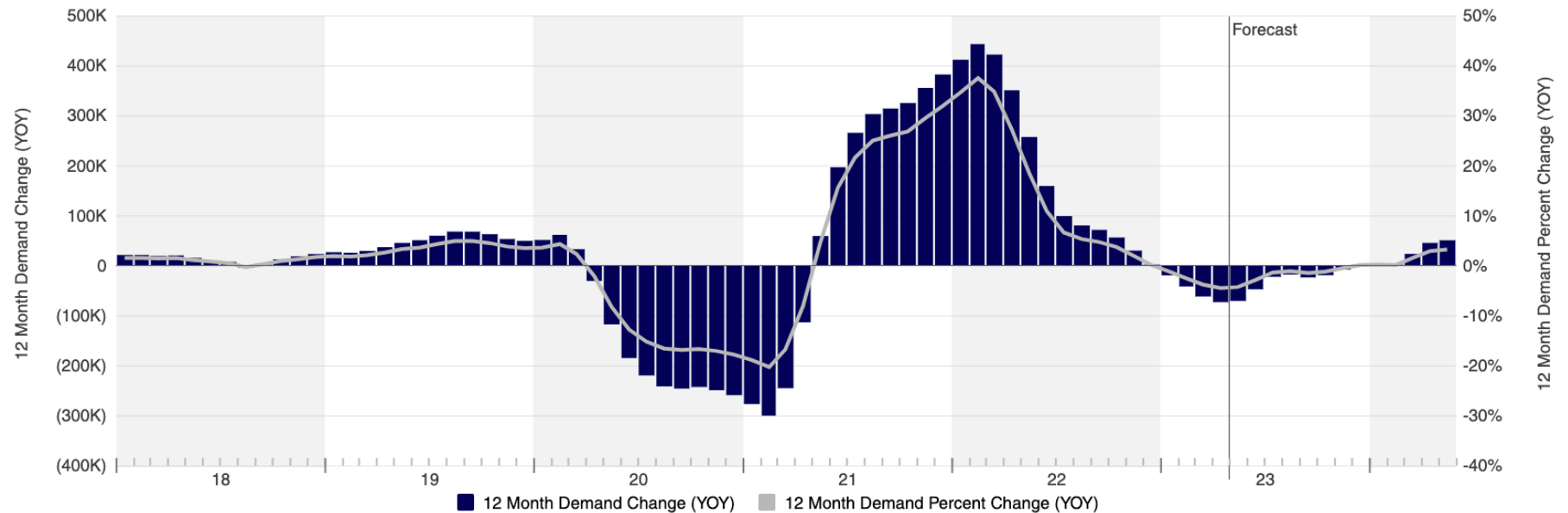
TOTAL YEAR: **+19%**

**MONTANA**  
OFFICE OF TOURISM AND BUSINESS DEVELOPMENT

# BOZEMAN HOTEL TRENDS

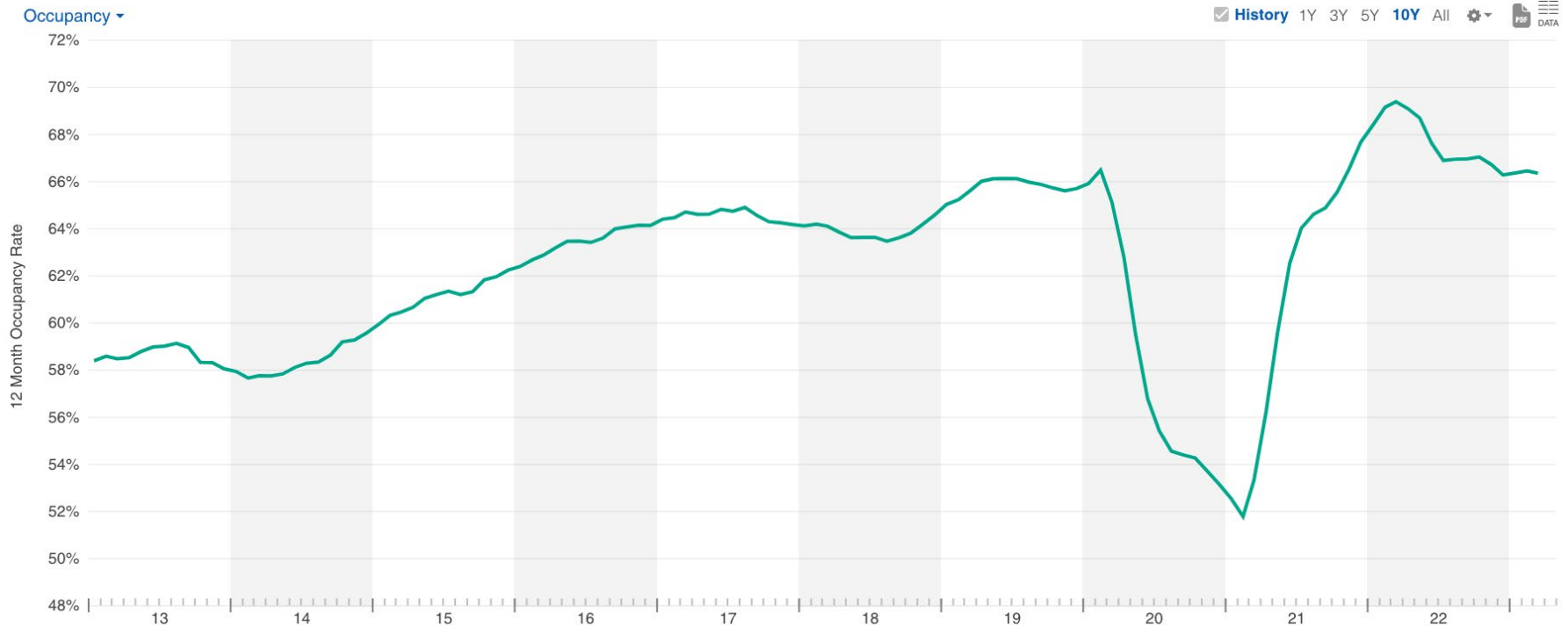
## HOTEL DEMAND CHANGE

### DEMAND CHANGE



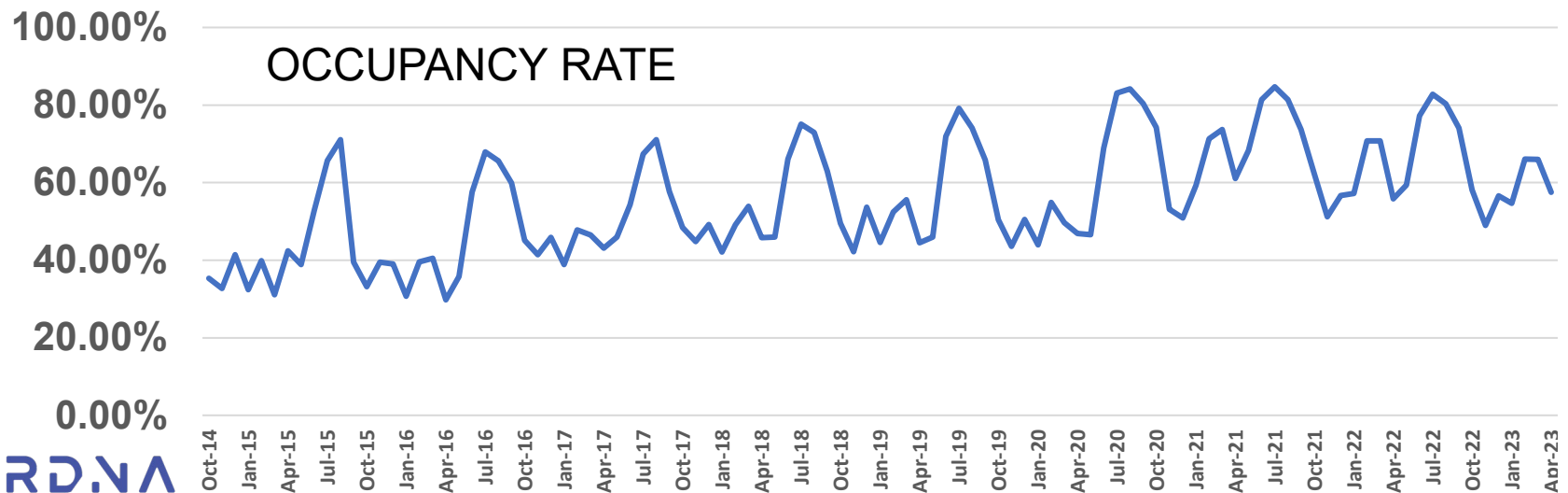
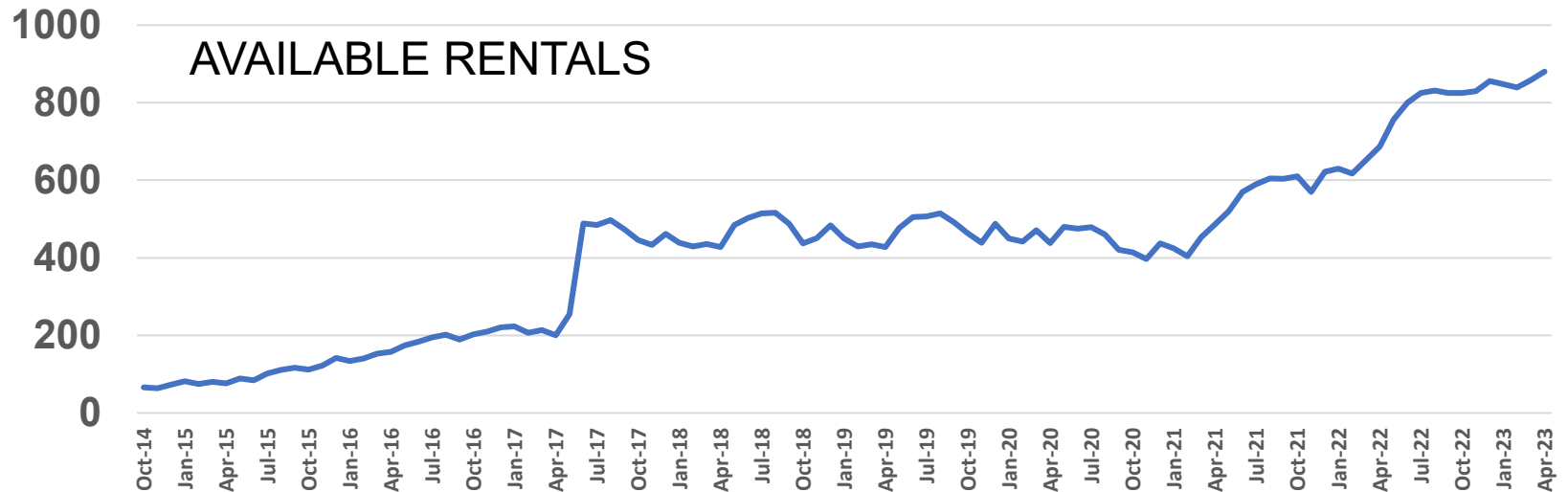
# BOZEMAN HOTEL TRENDS

## OCCUPANCY RATE





# SHORT TERM RENTALS



AIRDNA

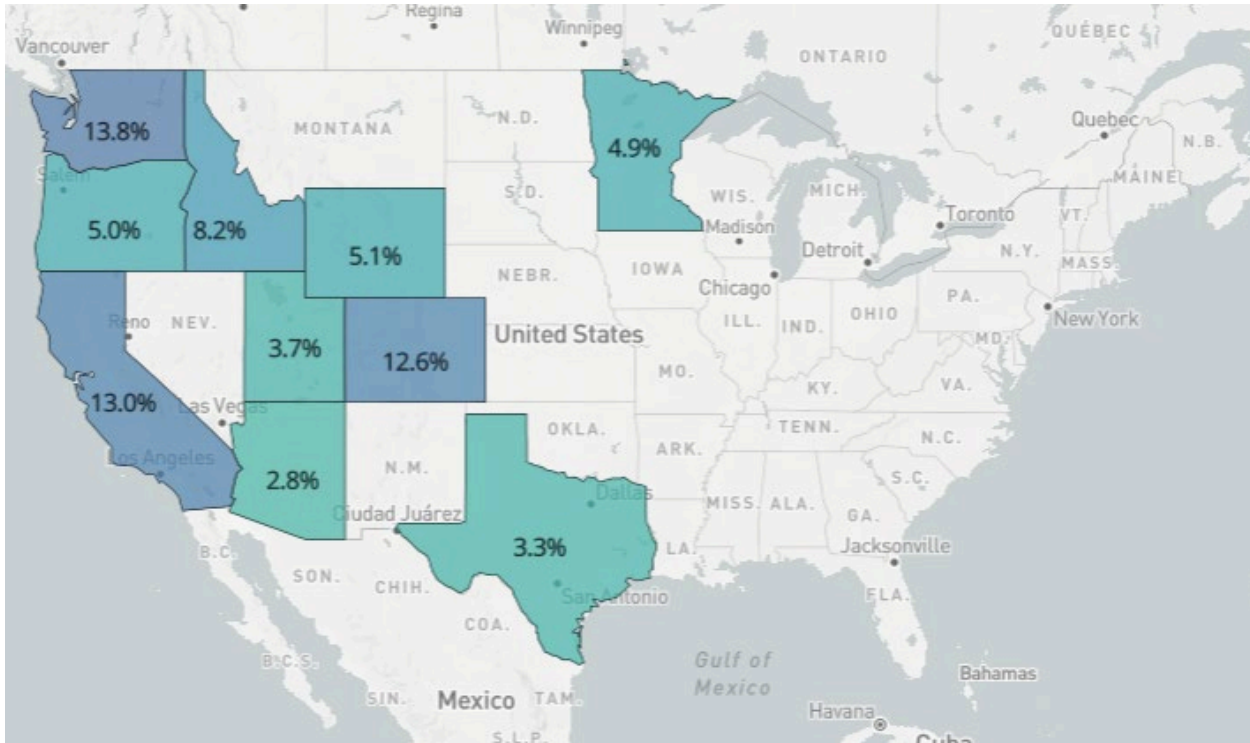
# 2023 EXPEDIA TRAVEL TRENDS

- PEOPLE ARE OPTING FOR URBAN/CULTURAL DESTINATIONS
- INTERNATIONAL TOURISM IS OPENED BACK UP
- TV TOURISM IS STILL POPULAR

*In 2023, travelers are ditching the conventional and veering off course for all-new experiences. Prepare for the year of the no-normal.*



# ORIGIN MARKETS BY STATE

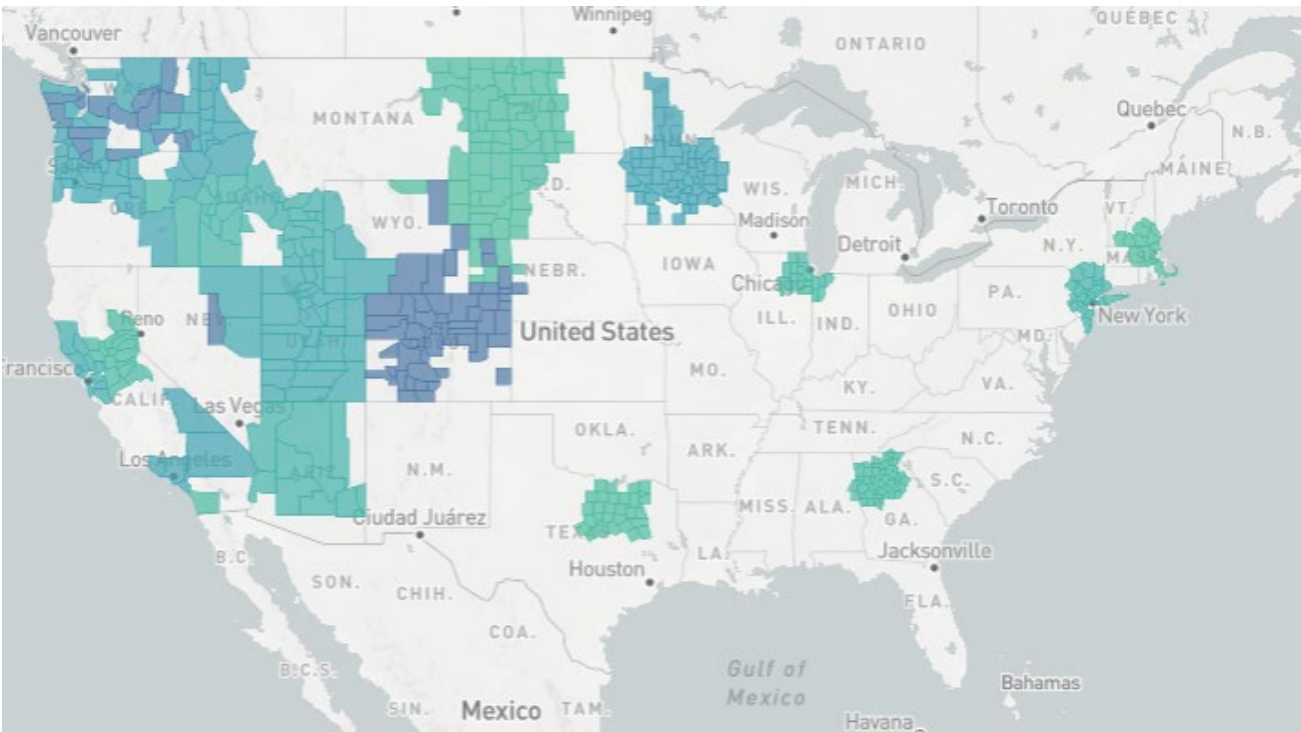


## The top ten origin states

1. Washington
2. California
3. Colorado
4. Idaho
5. Wyoming
6. Oregon
7. Minnesota
8. Utah
9. Texas
10. Arizona



# ORIGIN MARKETS – BY METRO



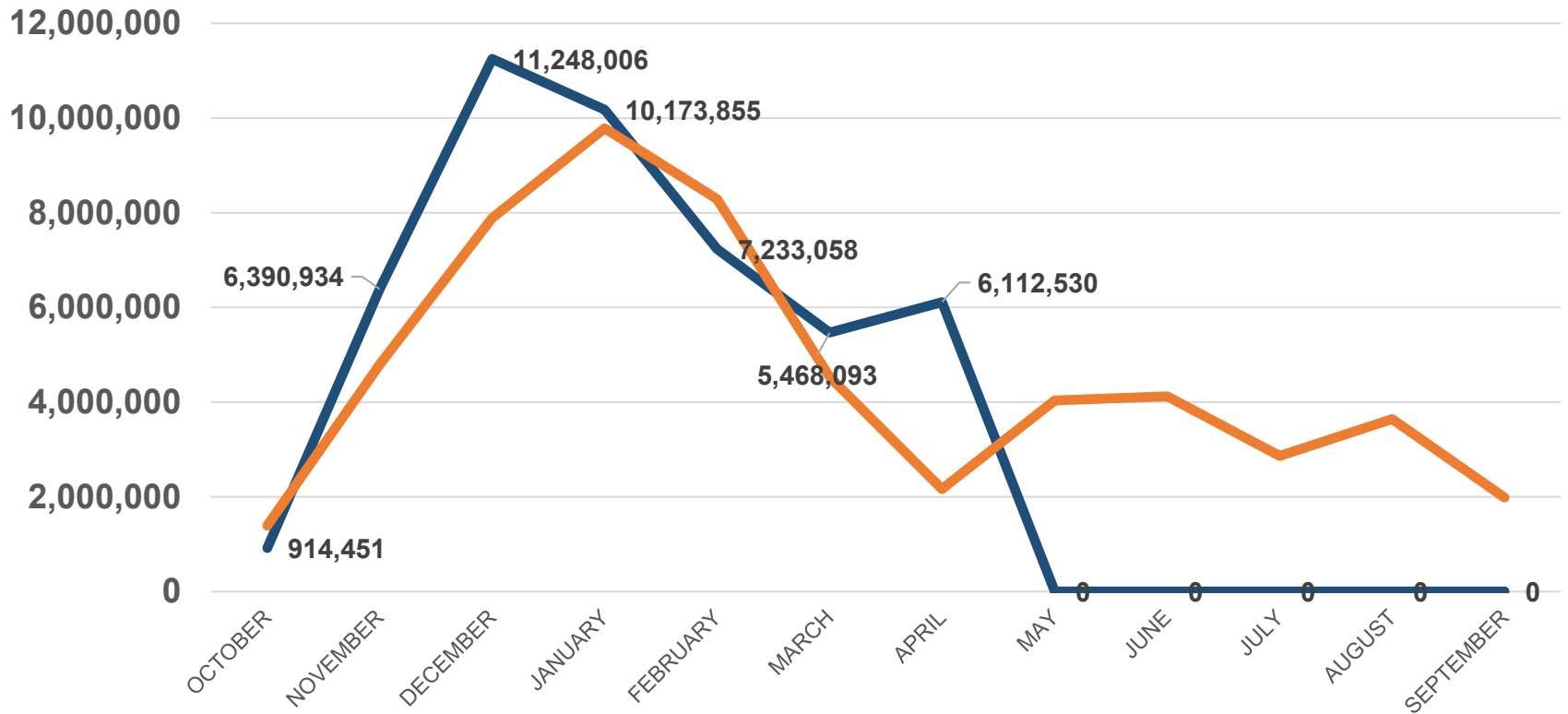
The top ten origin DMAs for the period

1. Denver
2. Seattle/Tacoma
3. Minneapolis/Saint Paul
4. Los Angeles
5. Spokane
6. Portland-Or
7. Salt Lake City
8. San Francisco/Oakland/San Jose
9. Idaho Falls/Pocatello
10. Phoenix



# MARKETING RESULTS

## Digital Impressions Per Month



VISIT **BOZEMAN**

47M IMPRESSIONS



# MARKETING RESULTS

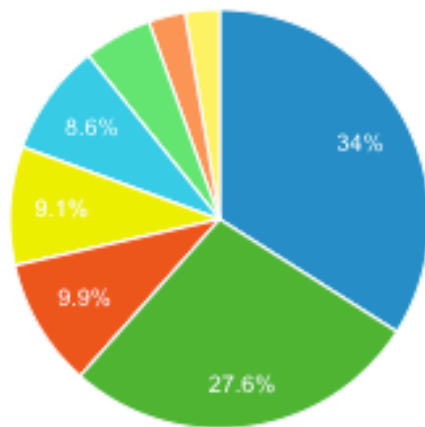
## WEBSITE TRAFFIC

Apr 1, 2022 - Apr 30, 2023: Users

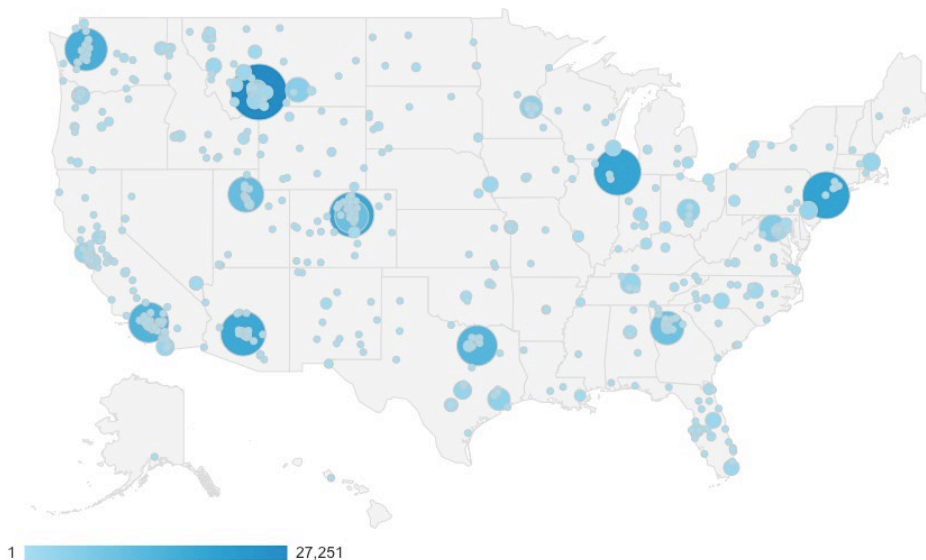
Apr 1, 2021 - Apr 30, 2022: Users



## Top Channels

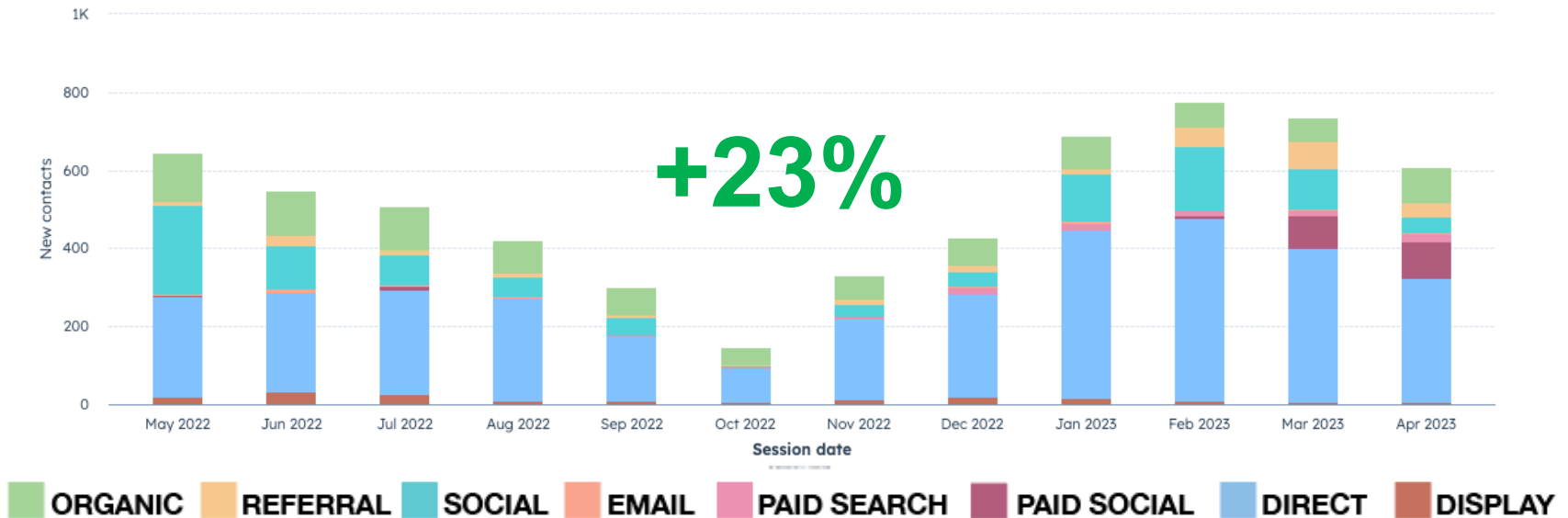


- Organic Search
- Social
- Paid Search
- Direct
- Display
- (Other)
- Email
- Referral



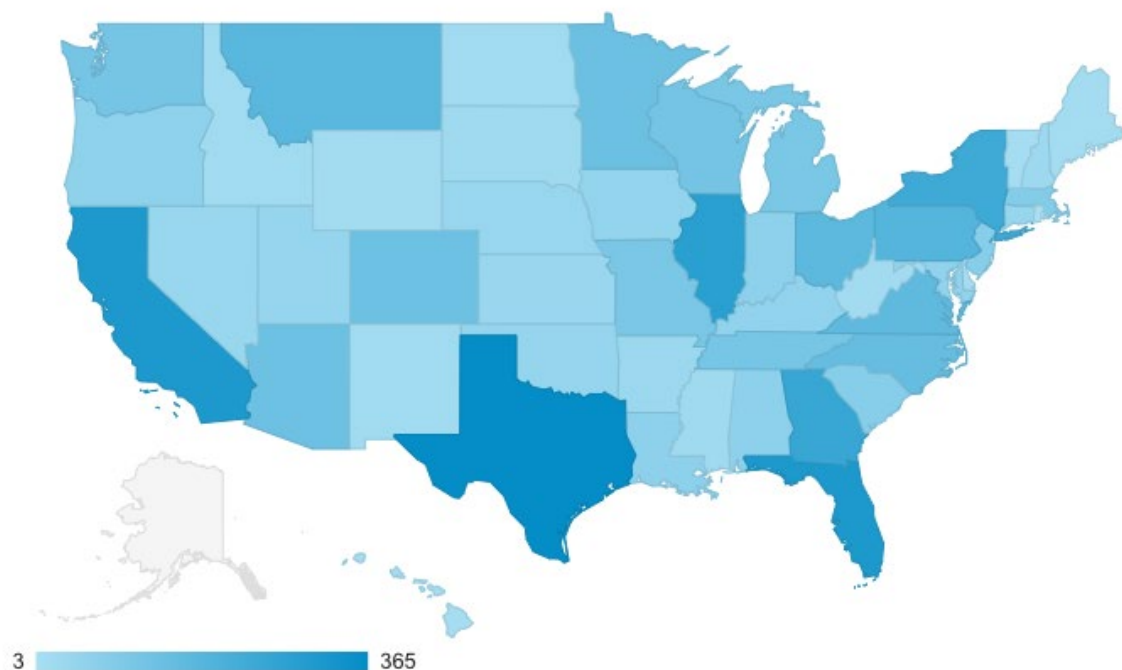
# MARKETING RESULTS

## TRAVEL GUIDE REQUESTS



# MARKETING RESULTS

## TRAVEL GUIDE REQUESTS



### Travel Guide Requests

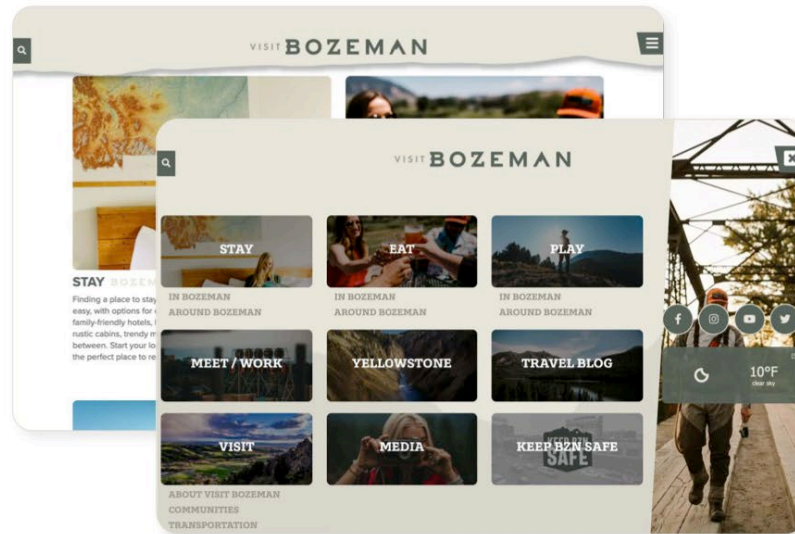
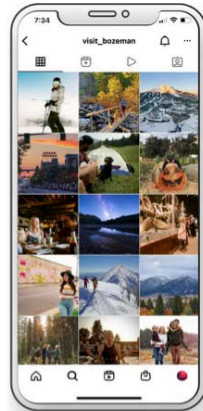
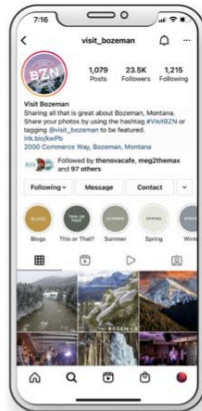
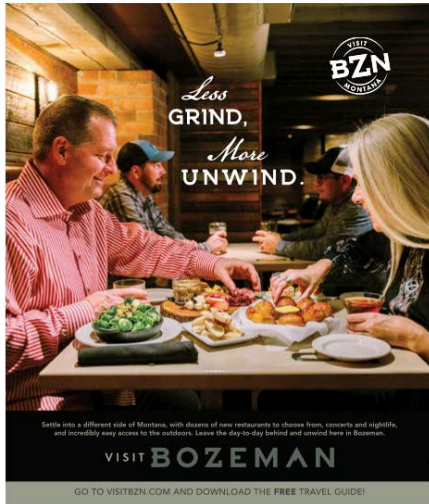
1. Texas
2. Florida
3. California
4. Illinois
5. Georgia
6. New York
7. Pennsylvania
8. Montana
9. Ohio
10. Virginia



- 2.1M VISITORS
- \$730M IN VISITOR SPENDING

# NEW BRAND

## PRINT AD EXAMPLE, WEB & INSTAGRAM PAGES



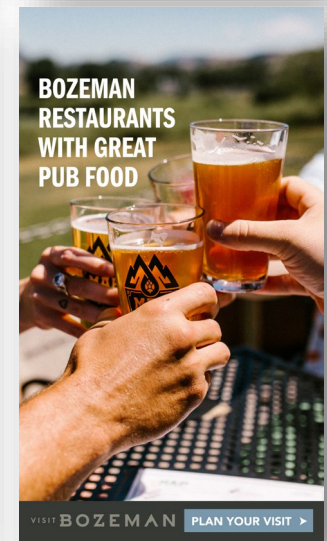
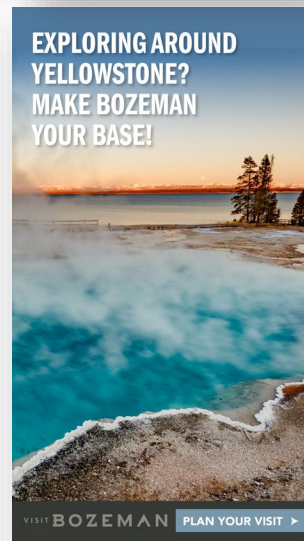
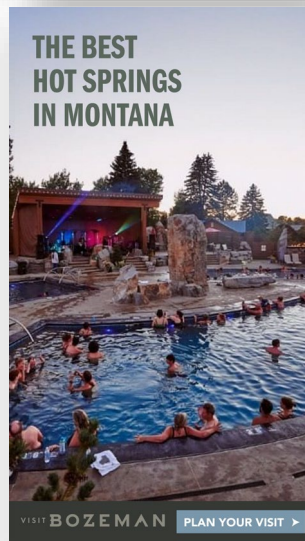
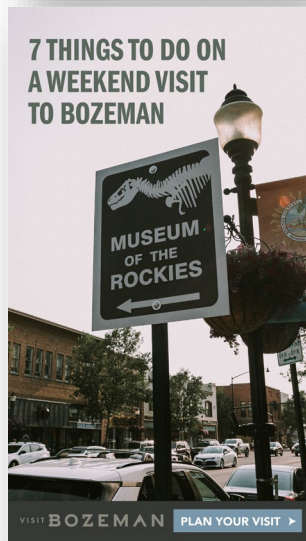
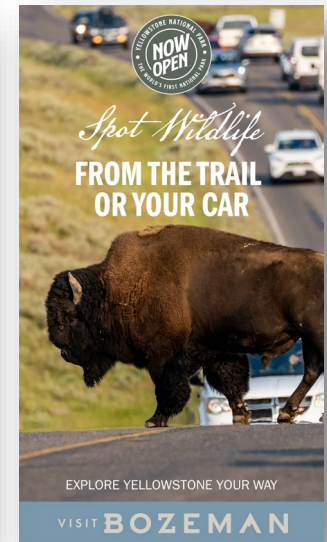
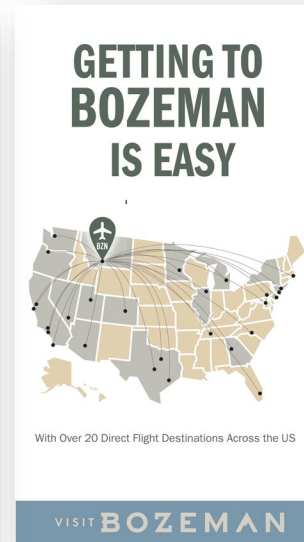


# SUMMER CREATIVE





# SUMMER CREATIVE





# SUMMER CREATIVE



## SKYSCRAPERS

### AS FAR AS THE EYE CAN SEE

Bozeman is nestled deep in the heart of the Gallatin Valley and is surrounded on all sides by pristine mountain ranges, trout-laden lakes & rivers, and some of the best wildlife spotting on this side of the continental divide.

Escape the gridlock of city life and reach the outdoor paradise you've been daydreaming of in Bozeman, Montana.

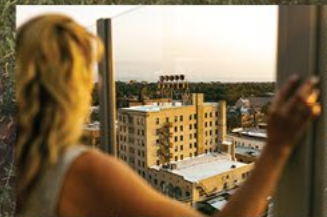
VISIT **BOZEMAN**

bozeman area  
**chamber**  
of Commerce

**BOZEMAN YELLOWSTONE INTERNATIONAL AIRPORT (BZN)**

NON-STOP DESTINATIONS

*Note: Seasonal changes to flights may occur*



LEARN MORE AND  
DOWNLOAD YOUR FREE  
BOZEMAN TRAVEL GUIDE!



VISIT **BOZEMAN**

# SOCIAL VIDEO CONTENT

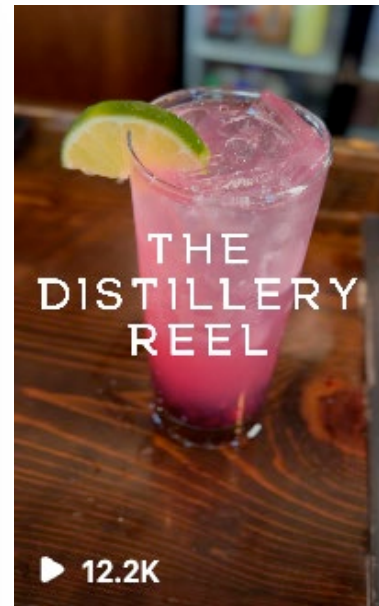
14 TOTAL VIDEOS – 290K VIEWS



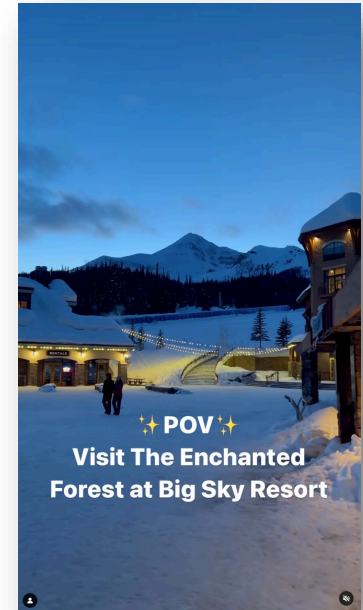
15K VIEWS



23K VIEWS



12K VIEWS



70K VIEWS



@VISIT\_BOZEMAN

## SOCIAL MEDIA



## MEDIA VENDORS





# RESEARCH

VISIT **BOZEMAN**

## 2022 Resident Sentiment Study Memorandum of Findings

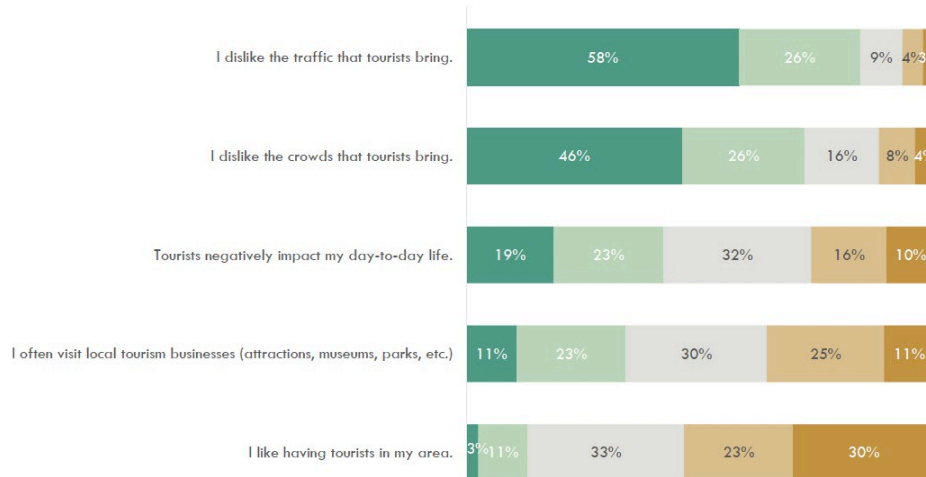
February 2023

Destination  Analysts



Figure 18: Personal Impact Statements – Agreement Levels

■ 5 - Strongly agree ■ 4 ■ 3 ■ 2 ■ 1 - Strongly disagree

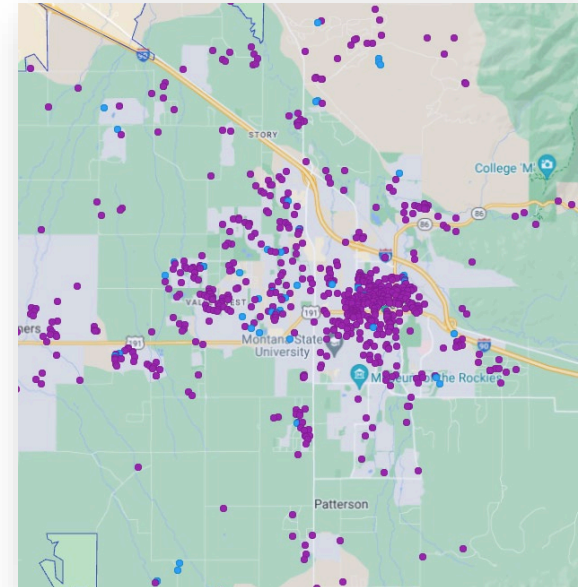


## RESEARCH PROJECTS

- RESIDENT SENTIMENT STUDY
- VISITOR PROFILE STUDY

## NEW DATA SOURCES

- SMITH TRAVEL DATA
- AIR DNA



# PHOTO/VIDEO SHOOTS



## STATE OF MONTANA CHANGES

CHOOSE 3 AREA'S  
OF FOCUS

- GOALS
- OBJECTIVES
- METHODS
- METRICS



# FY24 FOCUS

## DESTINATION MARKETING

**GOAL:** INCREASE IN-STATE VISITATION. THROUGH INCREASED PARTNERSHIPS, LOCAL EVENTS, PR OPPORTUNITIES, AND CREATIVE PROGRAMS AND MESSAGING.

**GOAL:** RE-FOCUS NATIONAL MARKETING CAMPAIGNS ON TARGETED DIRECT FLIGHT MARKETS AND REGIONAL DRIVE MARKETS.

## DESTINATION MANAGEMENT

**GOAL:** CONDUCT IN-STATE RESEARCH REGARDING MONTANA RESIDENT SENTIMENT ABOUT BOZEMAN.

## DESTINATION STEWARDSHIP

**GOAL:** CONTINUE TO ENHANCE OUR ORGANIZATION'S STEWARDSHIP ROLE THROUGH PARTNERSHIPS, OUTREACH AND EDUCATION THROUGH PROGRAMS SUCH AS OUTSIDE KIND AND BE GOOD TO BOZEMAN.



# DESTINATION MARKETING

STARTING IN JUNE

- **NATIONAL MARKETING CAMPAIGN**
  - SUPPORT DIRECT FLIGHT MARKETS
- **REGIONAL/DRIVE MARKETS**
  - EASTERN WASHINGTON
  - IDAHO
  - UTAH
  - DAKOTAS
  - WYOMING
- **IN-STATE**
  - EVENTS
  - PARTNERSHIPS
  - IN-TOWN EXPERIENCES



# DESTINATION MANAGEMENT

## STARTING THIS SUMMER

- RESEARCH INITIATIVES
  - IN-STATE SENTIMENT
  - WHAT IS THE PERCEPTION OF BOZEMAN?
  - WHY DO PEOPLE COME TO BOZEMAN?
  - HOW OFTEN DO PEOPLE COME TO BOZEMAN?
  - WHAT PREVENTS PEOPLE FROM VISITING BOZEMAN?

### Impact of Tourism on Bozeman's Community

Figure 15a: Community Impact Statements – Agreement Levels

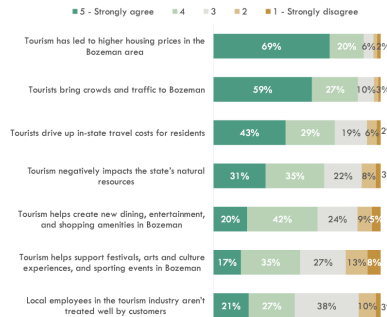
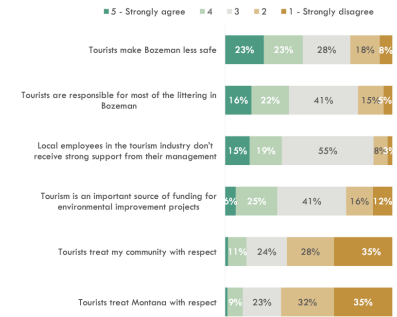


Figure 15b: Community Impact Statements – Agreement Levels



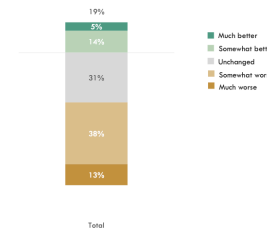
Question: Thinking about Montana's tourism industry and its impact on Bozeman's community, please rate how much you agree with the following statement using a five-point scale in which "1" represents "Strongly disagree" and "5" represents "Strongly agree."

Base: All respondents, 954 completed surveys

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### Current Bozeman Quality of Life

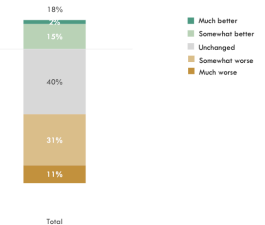
Figure 7: Current Quality of Life Compared to One Year Ago



Question: Compared to one year ago, how would you rate your personal quality of life in the Bozeman area? Base: Respondents who live in the Bozeman area, 954 completed surveys

### Future Bozeman Quality of Life

Figure 8: Expected Change in Quality of Life One Year Ahead



Question: Thinking one year ahead, how do you expect your personal quality of life to change in the Bozeman area? Base: Respondents who live in the Bozeman area, 954 completed surveys

Destination Analysts page 12



# DESTINATION STEWARDSHIP

STARTED LAST SUMMER

- FOCUSED ON
  - HELPING PRESERVE OUR AREA
  - ENCOURAGING SUSTAINABLE TOURISM
  - CREATING REALISTIC EXPECTATIONS
  - EDUCATING VISITORS
  - PROMOTING KINDNESS
  - PARTNERSHIPS WITH LOCAL ORGANIZATIONS



# BE GOOD TO BOZEMAN

- CAMPAIGN ASSETS
  - VISITOR PACKET
  - BLOG CONTENT
  - SOCIAL MEDIA POSTS
  - DIGITAL ADS
  - PRINT ADS
  - POSTERS
  - TABLE TENTS
  - STICKERS
  - VIDEO SERIES
  - MAIN STREET BANNER





# THANK YOU!

