• MO Tourism Economic Impact
• MDT Brand Marketing
• MDT Opportunities
• The Halo Effect
• 2016 Creative Sneak Peak
"Travel is fatal to prejudice, bigotry, and narrow-mindedness, and many of our people need it sorely on these accounts."

- Mark Twain
TRAVEL PROMOTION'S VIRTUOUS CYCLE

1. Travel Marketing and Promotion
2. Increased Visitor Trips
3. New Jobs and Tax Revenues
4. Additional Visitor Spending
The Power of Travel Promotion
The Halo Effect in Tourism

Oxford Economics: “Tourism promotion fuels development across the entire economic spectrum … by sustaining air service, creating familiarity, attracting decision-makers and improving the quality of life.”
MO Division of Tourism

- Operating arm of the Missouri Tourism Commission
- Promotes Missouri as a top-of-mind travel destination through paid, owned, and earned media in order to drive increased visitation to Missouri
- Missouri Travel Guide
- VisitMO.com and other web assets
- Robust cooperative marketing programs for DMOs
- Actionable research for industry
- Nine Official Missouri Welcome Centers
MO Tourism Matters

• $15.9 billion: Total economic impact in FY15
• 40.4 million: Visitors to Missouri in FY15
• 297,129: Direct jobs supported in FY15
• 557,700: Visitors to Welcome Centers in FY15
• 3.1 million: Visits to MDT websites in 2015
• $4.09: State tax revenue per $1 invested in MDT 2015 budget
Total Economic Impact of Tourism

Total Economic Impact in $millions

- $1 mil to <$25 mil
- $25 mil to <$50 mil
- $50 mil to <$100 mil
- $100 mil to <$500 mil
- $500 mil to $2,500 mil

Total FY15 Economic Impact: $15.9 billion

VisitMO.com
Tourism Economic Impact by County

Source: Tourism Economics FY15

Top Counties and St. Louis City, $billions

- St. Louis: 2.7
- Jackson: 2.0
- St. Louis City: 1.5
- Taney: 1.4
- Clay: 0.8
- St. Charles: 0.8
- Greene: 0.8
- Boone: 0.5
- Camden: 0.4
- Platte: 0.4
- Jefferson: 0.2
- Cole: 0.2
- Buchanan: 0.2
- Cape Girardeau: 0.2
- Cooper: 0.2

Source: Tourism Economics FY15
Tourism Employment by County

Sources: Tourism Economics, MO Dept. of Labor FY15

Employment in Tourism-related Industries

Top Counties and St. Louis City, thousands

St. Louis 61.2
Jackson 40.2
St. Louis City 27.2
St. Charles 20.2
Greene 17.6
Taney 12.4
Clay 12.0
Boone 11.4
Jefferson 6.3
Platte 5.8
Jasper 5.1
Buchanan 4.6
Cape Girardeau 4.3
Camden 3.9
Cole 3.9
Statewide Lodging

CALENDAR YEAR 2015 vs. CALENDAR YEAR 2014

• RevPar +7.0%
• ADR +3.9%
• Room Demand +3.6%
• Occupancy +3.0%

-- Smith Travel Research

MISSOURI
enjoy the show

VisitMO.com
Missouri Visitation

- Since FY2010, visits to Missouri have grown by an average of 920,000 per year.
- Visitation reached an all-time high of 40.4 million in FY2015, a 2.9% increase from FY2014.
- Growth will average 2.7% through FY2018, when Missouri will host 43.6 million visitors.

Source: Tourism Economics
How MDT defines Visitor

• Travels 50+ miles (one way) from home for event, attraction or dining OR

• Stays the night at a lodging property, even if it’s less than 50 miles from home
Where our visitors come from
Visitors By Month

- **June**: 10.8%
- **July**: 10.0%
- **August**: 9.3%
- **September**: 10.7%
- **October**: 10.5%
- **November**: 6.9%
- **December**: 8.5%
- **January**: 4.1%
- **February**: 5.2%
- **March**: 7.6%
- **April**: 8.4%
- **May**: 8.0%

Seasonal Breakdown:
- **Summer**: 30.1%
- **Fall**: 28.1%
- **Winter**: 17.8%
- **Spring**: 24.0%
Visitors’ top activities

- Shopping 51%
- Unique, Local Dining 39%
- City Sightseeing 33%
- Family Attractions 26%
- Museums/Cultural 20%
- Live Shows 20%
- Theme Parks 19%
- Historic Sites 18%
- Quaint/Small Towns 17%
- State Parks 17%
- Scenic Drives 16%
- Fishing/Boating 13%
- Gambling/Casinos 11%
- Caves 10%
- Professional Sports 10%
## International Visitors to Missouri

### 400,000 Visitors from 178 Countries

<table>
<thead>
<tr>
<th>Rank</th>
<th>Origin</th>
<th>Visitation</th>
<th>Share %</th>
<th>Expenditures</th>
<th>Spending per Traveler</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>CANADA</td>
<td>179,293</td>
<td>44.9%</td>
<td>$52,380,207</td>
<td>$292</td>
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<tr>
<td>2</td>
<td>MEXICO</td>
<td>43,388</td>
<td>10.9%</td>
<td>$40,448,454</td>
<td>$932</td>
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<tr>
<td>3</td>
<td>UNITED KINGDOM</td>
<td>28,426</td>
<td>7.1%</td>
<td>$31,125,345</td>
<td>$1,095</td>
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<tr>
<td>4</td>
<td>CHINA</td>
<td>19,669</td>
<td>4.9%</td>
<td>$33,634,444</td>
<td>$1,710</td>
</tr>
<tr>
<td>5</td>
<td>JAPAN</td>
<td>16,013</td>
<td>4.0%</td>
<td>$18,403,320</td>
<td>$1,149</td>
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<tr>
<td>6</td>
<td>BRAZIL</td>
<td>8,892</td>
<td>2.2%</td>
<td>$12,997,276</td>
<td>$1,462</td>
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<tr>
<td>7</td>
<td>GERMANY</td>
<td>8,515</td>
<td>2.1%</td>
<td>$7,924,086</td>
<td>$931</td>
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<tr>
<td>8</td>
<td>AUSTRALIA</td>
<td>7,283</td>
<td>1.8%</td>
<td>$10,214,834</td>
<td>$1,403</td>
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<tr>
<td>9</td>
<td>INDIA</td>
<td>6,774</td>
<td>1.7%</td>
<td>$7,167,814</td>
<td>$1,058</td>
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<tr>
<td>10</td>
<td>FRANCE</td>
<td>6,413</td>
<td>1.6%</td>
<td>$5,783,031</td>
<td>$902</td>
</tr>
</tbody>
</table>
2015-2016 Marketing Highlights

• Strong, diversified paid media mix in 24 out-of-state markets (including all major media markets in OH, KY, TN, OK and IA)

• PR/Social strategy focusing on brand image and emerging technologies

• Robust cooperative marketing programs with 30+ statewide DMOs
2015-2016 Target Markets/11 States

• **Priority:** Chicago, Louisville and Memphis

• **Expansion:** Cincinnati, Cleveland, Columbus, Dayton, Indianapolis, Lexington and Nashville

• **Base:** Cedar Rapids, Champaign, Des Moines, Evansville, Jonesboro, OK City, Omaha, Paducah, Peoria, Quad Cities, Sioux City, Terre Haute, Topeka, and Tulsa

• **Spill:** Bowling Green, Chattanooga, Columbia/Jefferson City, Ft. Wayne, Ft. Smith, Jackson, Joplin, Kansas City, and Knoxville
Overall Media Strategy

- Paid Media
- Owned Media
- Earned Media
- Converged Media
2015 Results

2015 Marketing & Media Effectiveness Study (SMARI): MDT’s marketing efforts generated more than 2 million *incremental* trips and $2.1 billion in *incremental* visitor spending; in addition:

- 65% of target recalled one or more campaign elements
- 16 million households were aware of advertising
- Brand creative continued to receive strong ratings
- ROI of $91 to $1 on MDT Marketing Budget
MDT Partnership Opportunities

- MO Travel Guide
- VisitMO.com
- Monthly E-newsletters
- MO Welcome Centers
- MO Motorcycle Guide
- Promote MO Fund
- SEM Program

- International
- Regional
- Community Outreach
- Research
- Education
- MO Film Office
Missouri Travel Guide

- MDT’s largest print asset
- 550,000 copies printed
- Distributed statewide, nationally and globally
- 280,000 polybagged in Chicago + 7 markets
- Reinforces brand message
VisitMO.com

• 2.3 million visits in CY15
• 5,500+ listings
• Trip Ideas, coupons, articles
• Festivals/events
• Seasonal Highlights
• Sign up for eblasts
MDT has strong social media presence: Facebook (two), Twitter (multiple), Instagram, Pinterest and YouTube.

VisitMO Spotlight Blog features guest bloggers.
E-newsletters

- E-blasts are sent to between 50,000 and 75,000 self-described enthusiasts twice per month on a year-round basis. Advertising is available.
Missouri Welcome Centers

- Located at 9 key entry points to the State: Hannibal, Hayti, Joplin, Kansas City, Eagleville, Rock Port, St. Louis, plus 2 at Conway
  - 500,000+ visitors
  - Front-line tourism ambassadors
  - 8 Affiliate Centers
Missouri Motorcycle Guide

- Joint project with Missouri Life
- 20 motorcycle routes in all regions of the state
- 25,000 copies printed
- Distributed statewide/regionally
- 2016 Guide in process
- Route 66 Guide to come
I. **Marketing Matching Grant:**
50/50 match for paid advertising
(certified DMOs on county level)

II. **Collective Marketing Initiatives:**
Subsidized print/digital menu for
all DMOs + tourism industry

III. **Marketing Platform Development:**
One-time investment in website,
visitor profile, creative, etc. for
emerging DMOs
SEM Program

- DMOs participate in subsidized pay-per-click search engine marketing partnership

- Ensures partners are not in competition with MDT or other Missouri participants.
Brand USA/Travel South USA/MRC

• **Brand USA:** $150M annual international investment, MDT and MO destinations partnered in 16 native language videos/articles translated into 9 languages on VisittheUSA.com and in **BUSA Inspiration Guide**, as well as media projects and sales efforts in Canada, UK and Australia.

• **MDT joined TSUSA in 2014** to promote international travel to the South.

• **Mississippi River Country** markets the Mississippi River states to Japan.
Regional/State Partnerships

• **Regional/Affinity:** Highway 36, Old Trails, AgriMissouri and Route 66 Association

• **State agencies:** MO Arts Council, MO State Parks, MO Wine & Grape Board, Dept. of Conservation, DNR, and MO Humanities Council
Working with MDT

- **Community Outreach:** MDT offers speakers to community groups on tourism subjects
- **Participation in regional and community workshops** developing rural tourism: MO DED projects, MO Community Betterment, MU Extension
- **Research Consultation**
- **Other Partnerships**
Tourism Industry Education

• FREE access to weekly live webinars and unlimited 24/7 access to 80+ recorded webinars on wide variety of digital marketing topics

• 300+ MO industry members have signed up

• Go to Industry.VisitMO.com for password and information.

VisitMO.com
• **FY15** -- Supported 154 film and media projects and 14,500 jobs

• **MoFilm.org** -- State-wide database of skilled workers and diverse filming locations across Missouri; 9,056 web visits in FY15 (+13.1% vs. FY14).

• **The film industry is thriving in Missouri**, with 15 film festivals held annually and 38 film/digital media programs at Missouri colleges and universities.
Destination Marketing and Economic Development: Creating a Singular Place Brand

George Zimmermann & Bill Siegel

September 2015
Impact of Michigan’s 2014 Tourism Campaign on State’s Economic Development Image

Base: National Out-of-State Residents

- A good place to live
  - Aware: +81%
  - Unaware: +59%

- A good place to start a career
  - Aware: +50%

- A good place to start a business
  - Aware: +50%
  - Unaware: +41%

- A good place to attend college
  - Aware: +100%

- A good place to purchase a home
  - Aware: +79%

- A good place to retire

Percent Who Strongly Agree

Aware | Unaware
Hamptons of Michigan Draws New Yorkers With Bargain Homes

“A surge in tourism from visitors outside of Michigan is helping increase demand for vacation houses in the region, where the median home price is about a quarter of that in the Hamptons.”

Bloomberg, Sept. 14, 2012
Method

- Surveyed Adults 18+ in targeted markets of 7 U.S. states and 2 CVBs
- Focused on image change created by:
  A. Tourism ad awareness
  B. Visiting the destination

<table>
<thead>
<tr>
<th>Sample</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>North Dakota</td>
<td>893</td>
</tr>
<tr>
<td>Wisconsin</td>
<td>1,336</td>
</tr>
<tr>
<td>Ohio</td>
<td>1,006</td>
</tr>
<tr>
<td>North Carolina</td>
<td>1,601</td>
</tr>
<tr>
<td>New Mexico</td>
<td>6,032</td>
</tr>
<tr>
<td>Minnesota</td>
<td>1,698</td>
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<tr>
<td>Michigan</td>
<td>4,022</td>
</tr>
<tr>
<td>Portland OR</td>
<td>997</td>
</tr>
<tr>
<td>Lake Erie Shores &amp; Islands OH</td>
<td>1,053</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>18,638</td>
</tr>
</tbody>
</table>
Method

- Respondents shown client ads across media channels to measure awareness
“A Good Place to Live”

% Image Lift Across Nine DMOs

- Advertising: 65%
- Visitation: 70%
- Advertising Plus Visitation: 146%
“A Good Place to Start a Career”

% Image Lift Across 9 DMOs

- Advertising: 79
- Visitation: 77
- Advertising Plus Visitation: 163
“A Good Place to Start a Business”

% Image Lift Across Nine DMOs

- Advertising: 79%
- Visitation: 96%
- Advertising Plus Visitation: 194%
"A Good Place to Attend College"

% Image Lift Across Nine DMOs

- Advertising: 66%
- Visitation: 80%
- Advertising Plus Visitation: 143%

Percent
“A Good Place to Purchase a Vacation Home”

% Image Lift Across Nine DMOs

- Advertising: 90%
- Visitation: 86%
- Advertising Plus Visitation: 201%

Percent
"A Good Place to Retire"

% Image Lift Across Nine DMOs

- Advertising: 79
- Visitation: 69
- Advertising Plus Visitation: 164

Percent
“The visitor-focused advertising of DMOs has a pronounced impact on measures that many community leaders have long said are 'more important than tourism'.”
State of Missouri Halo Effect Study

Coming August 2016
2016 Sneak Peak
Branding Campaign

Brand creative focuses on Missouri’s diverse tourism assets associated with five activity genres: Arts/Culture, Outdoor Recreation, Family Fun, Nightlife/Entertainment and Sports/Gaming.
Enjoy the Show Campaign

2013 LAUNCH: Extensive in-state and regional promotion

2014 INFRASTRUCTURE: Enhanced digital content and social media reach, additional paid media in Chicago, Louisville and Memphis.

2015-2016 EXPANSION: Expand target to Women 25-54, add fall campaign, additional 5 expansion markets -- Cincinnati, Cleveland, Columbus, Dayton, and Nashville, public relations focus on outdoor recreation, and international projects with Brand USA and Travel South.
Enjoy the Show in 2016

2016 creative will speak more directly to passion points of individual travelers as they learn what they can see, do and experience from real visitors like themselves.
Our Groups

Chicago
Memphis
Nashville
Tulsa
Omaha
Little Rock
A couple. A journey across Missouri.

EXPLORING THE OUTDOORS AT ITS GREATEST.

Meet Lex and Kristian from Memphis. We gave them a camera and an adventure in the Show-Me State. You’ll never guess where the trail led.

See more of their show, and start enjoying yours, at VisitMO.com.

CHAIN OF ROCKS BRIDGE, ST. LOUIS

Two romantics. One classic Missouri ride.

Hop on for all the twists and turns.

Meet the McCollum from Little Rock. We gave them a camera and a road trip along Route 66 in the Show-Me State. You won’t believe everywhere they get their kicks.

See more of their show, and start enjoying yours, at VisitMO.com.
This family. A camera. Their trip to Missouri.

SEE ALL THE FUN THAT DEVELOPS.

Follow the McCords from Chicago as they show what fun for the whole family looks like in the Show-Me State. This is just a glimpse of the excitement.

See more of their show, and start planning yours, at VisitMO.com.

A family. A vacation to Missouri.

THINGS ARE ABOUT TO GET WILD.

Meet the McCords from Chicago. We gave them a camera and a vacation to the Show-Me State. That’s when all the fun really started.

See more of their show, and start planning yours, at VisitMO.com.
These girlfriends. A camera. A getaway to Missouri.

SOUNDS LIKE A PERFECT WEEKEND TOGETHER.

Follow Krystal, Chinie and Jarrie from Nashville as they show how the girls get away in the Show-Me State. This was just one of their stops.

See more of their show, and start enjoying yours, at VisitMO.com.

Three friends. One escape to Missouri.

MAKES FOR A VINTAGE GIRLS GETAWAY.

Meet Jannie, Krystal and Chinie from Nashville. We gave them a camera and a girls getaway to the Show-Me State. But that was just the beginning.

See more of their show, and start enjoying yours, at VisitMO.com.
A family. A camera. A trip to Missouri.
LOOKS LIKE A VACATION THEY'LL NEVER FORGET.

Follow the Smoak family from Illinois as they show off the fun they found in the Show Me State. This is just one of their favorite memories.
See more of their story, and start enjoying yours, at VisitMO.com.

MISSOURI STATE FAIR, COLUMBIA

This family. Their road trip in Missouri.
TALK ABOUT A THRILL RIDE.

Meet the Smoak family from Illinois. We gave them a camera and a weekend in the Show Me State. Who knew they'd discover this much fun?
See more of their road trip, and start enjoying yours, at VisitMO.com.
Old buddies. New laughs in Missouri.

GOOD TIMES WORTH THE DRIVE.

Meet Jordan, Jeremy and Ryan from St. Louis. We gave them a chance to experience the Show Me State. That’s when things get interesting.

See more of their story, and start enjoying yours, at VisitMissouri.com.
Outdoor

RISE WITH THE ROAD TRIP ROMANTICS AT VISITMO.COM

MISSOURI enjoy the show

VisitMO.com
Outdoor

FOLLOW THE family fun-atics AT VISITMO.COM

MISSOURI enjoy the show

VisitMO.com
Outdoor

GETAWAY WITH THE GIRLFRIENDS AT VISITMO.COM

MISSOURI enjoy the show

VisitMO.com
Digital

Meet the road trip ROMANTICS

We gave them a CAMERA

and a ride across the SHOW-ME STATE

You won’t believe where they GOT THEIR KICKS

SEE THEIR WHOLE SHOW at VisitMO.com
Welcome to Missouri

It’s Your Show

There’s something for everyone to enjoy in the Show-Me State. To prove it, we gave these real vacationers a camera and sent them on a Missouri road trip.

Click on a group to follow along and enjoy their show.
Meet the McCord Family from Chicago

These family fun-atics from the Windy City know how to have a good time together. Not to mention where to go in Missouri to do it. From the amusement parks and zoo in St. Louis to the Mark Twain cave in Hannibal, follow their trip for all the fun.
MISSOURI

See more of their show
VisitMO.com
Missouri Tourism

• Strong Return on Investment
• Consistent growth industry
• Major employment source
• Scaled menu of programs for MO communities
• Positive effect across multiple economic sectors
Growing Together!

• Spread the word about MDT’s marketing opportunities.

• Tell us how MDT can better serve your region, industry or community.
MISSOURI
VisitMO.com
THANK YOU.

Dan.Lennon@ded.mo.gov