MISSOURI TOURISM: IMPACT AND OPPORTUNITIES

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Missouri Division of Tourism

Oct. 23, 2015
Today’s Presentation

• MO Division of Tourism
• MO Tourism Economic Impact
• MDT Research
• MDT Brand Marketing
MO Division of Tourism

- Promotes Missouri as top-of-mind travel destination through paid, owned, earned and social media in order to drive increased visitation to Missouri
- Missouri Travel Guide
- VisitMO.com and other web assets
- $4M+ in coop marketing programs for DMOs
- Actionable research for industry
- Nine Official Missouri Welcome Centers
MO Tourism Matters

- **$15.3 billion:** Total economic impact in FY14
- **$11.6 billion:** Total Expenditures in 17 SIC Codes
- **39.2 million:** Visitors to Missouri in FY14
- **290,734:** Direct jobs supported
- **248,808:** Facebook fans
- **$3.99:** State tax revenue per $1 invested in MDT FY14 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 FY14 Economic Impact: $15.3 billion

VisitMO.com
Quick Look at Area Counties

- Dent County: $12.6 million tourism spending; 356 employed in tourism, FY14.
- Reynolds County: $3.52 million tourism spending; 110 employed, FY14.
- Shannon County: $3.52 million tourism spending; 108 employed, FY14.
Missouri Visitation

- Visitation has grown by avg. 740,000/year since 2010.
- Recent recovery brought visitation to all-time high of 39.2 million in FY2014, a 3.3% increase from FY2013.
- Growth will average 2.7% annually through FY2018, when Missouri will host 43.6 million visitors.

Forecast of Total Visitation to Missouri

Source: Tourism Economics

VisitMO.com
Statewide Indicators

17 SIC CODES CY15 THROUGH JUNE: +6.8% (+$391M)

-- MO Dept. of Revenue

LODGING CY15 THRU JULY

- RevPar +7.4%
- ADR +4.4%
- Room Demand +3.6%
- Occupancy +2.9%

-- Smith Travel Research
2015 MDT Research Projects

- Economic Impact Reporting
- Marketing/Media Effectiveness Studies
- Smith Travel Lodging Reports
- International Research
- Welcome Center Study
- Segmentation Study
- nSight Subscription
- Website Research
- Monthly Missouri Barometer
Where do our visitors come from?
Where MDT Markets
## International Visitors to Missouri

### 399,473 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>
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<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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<td>2</td>
<td>MEXICO</td>
<td>43,388</td>
<td>10.9%</td>
<td>$40,448,454</td>
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<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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<td>4</td>
<td>CHINA</td>
<td>19,669</td>
<td>4.9%</td>
<td>$33,634,444</td>
<td>$1,710</td>
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<tr>
<td>5</td>
<td>JAPAN</td>
<td>16,013</td>
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<td>$18,403,320</td>
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<td>6</td>
<td>BRAZIL</td>
<td>8,892</td>
<td>2.2%</td>
<td>$12,997,276</td>
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<td>7</td>
<td>GERMANY</td>
<td>8,515</td>
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<td>8</td>
<td>AUSTRALIA</td>
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<td>$10,214,834</td>
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<td>9</td>
<td>INDIA</td>
<td>6,774</td>
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<td>10</td>
<td>FRANCE</td>
<td>6,413</td>
<td>1.6%</td>
<td>$5,783,031</td>
<td>$902</td>
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</table>
Visitors’ top activities

- Shopping 42%
- Unique, Local Dining 37%
- City Sightseeing 24%
- Family Attractions 18%
- Live Shows 16%
- Historic Sites 15%
- Theme Parks 13%
- Museums/Cultural 13%
- Scenic Drives 13%
- Quaint/Small Towns 12%
- State Parks 10%
- Fishing/Boating 9%
- Gaming 9%
- Professional Sports 8%
- Wineries 8%
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

2014: INFRASTRUCTURE

2015-2016: EXPANSION/PERSONALIZATION
2015-2016 Enjoy the Show

• 2015-2016 EXPANSION/PERSOMALIZATION: Expand target to W25-54, fall campaign, seven expansion markets, PR focus on outdoor recreation, sports partnerships, niche culinary/affinity markets (motorcycle, golf, etc.), and international marketing with Brand USA and Travel South.

• 2016 creative will follow families, couples and groups on their Missouri adventures.
2015-2016 Marketing Highlights

- Strong, diversified paid media mix in 24 out-of-state markets (including all DMAs in OH, KY, TN, OK and IA)
- PR/Social strategy focusing on brand image and consumer journey
- Robust co-operative marketing programs with statewide DMOs
Overall Media Strategy

Paid Media
- TV
- Print
- Online
- SEM
- Outdoor

Owned Media
- Facebook post
- Blog article
- Tweet
- VisitMO.com
- VisitMO Pinterest
- Promoted tweet
- Sponsored story
- E-blast
- Press Release

Converged Media
- Industry Co-op
- Press clip
- Word of Mouth
- Facebook comments
- Consumer tweets

Earned Media
- Facebook share
- Re-pin
- E-blast share
- Re-tweet
Television Creative
OUTDOOR THEATRE
AT ITS FINEST.

With 87 state parks and historic sites, ample recreational waterways and more than a thousand miles of award-winning trails, outdoor productions don’t get any more acclaimed than in the Show-Me State.

Enjoy the setting.

MISSOURI
enjoy the show

Plan your getaway at VisitMO.com
SOMETIMES THE BEST SEATS IN THE HOUSE
ARE NOT IN THE HOUSE AT ALL.

For fans of Mother Nature, there’s no better place to see her perform than the Show-Me State.

And with 87 state parks and historic sites, good seats are always available.

Enjoy the freedom.
AROUND HERE, EVERY ROW IS THE FRONT ROW.

With more than 100 wineries and nine different wine trails, fans of the grape have a friend in the Show-Me State—home of the oldest wine country in the nation. Enjoy the finer things.

MISSOURI

See more of Chaumette Vineyards and Winery at VisitMO.com
SEQUELS RARELY LIVE UP TO THE ORIGINAL.
UNTIL THEY DO.

Relive the life of Twain. Cheer legends at the Negro Leagues Baseball Museum. Or hit the road along the more than 280 miles of Route 66 in Missouri. In the Show-Me State, some stories are even better the second time around.

Enjoy the encore.

Plan your getaway at VisitMO.com
AROUND HERE, SUMMER BLOCKBUSTERS
PREMIERE EVERY DAY.

By water or land, Missouri sets the stage for outdoor adventure for the whole family, making summers in the Show-Me State not just a must see - but a must do.

Enjoy the excitement.

MISSOURI
enjoy the show

Plan your getaway at VisitMO.com
STORY ARCS DON'T GET ANY MORE DRAMATIC.

From Six Flags St. Louis to Worlds of Fun in Kansas City, down to Branson's Silver Dollar City—no matter where you go, the unexpected twists and turns of the Show-Me State are now playing.

Enjoy the rush.

Missouri
enjoy the show

Plan your getaway at VisitMO.com
TAKES BALCONY SEATS TO A WHOLE NEW LEVEL.

Whether you’re looking for the hottest restaurants to raise a glass, or the coolest venues to let down your hair, the Show-Me State has your VIP ticket to a memorable night.

Enjoy the evening.
Outdoor

ENJOY THE MOMENT.

VisitMO.com
States fight to draw central Ohio travelers

Arrival of billboards touting Missouri highlights competition for tourism dollars

This billboard along Dublin Road near Grandview Avenue is one of several that Missouri tourism officials have put up in the area.
IT TAKES STADIUM SEATING TO NEW HEIGHTS.

From the scenic bluffs of our great river roads, to the dramatic vistas of our Ozark Mountains, Missouri’s scenery is on another level. And as one of the “Top Five Places To See Fall Colors in North America,” it’s sure to take your breath away.

Enjoy the view.
E-newsletters

- **E-blasts** are sent to between 50,000 and 75,000 self-described enthusiasts **twice per month**, year-round.

- **Link to MDT’s online assets**, VisitMO and Spotlight blog.
2015 Key Message (80/20): Missouri is the country’s best destination for family-friendly outdoor activities.

• Distributed in news releases, social channels including Facebook, Twitter and the MO Spotlight blog, and on major journalist FAM tours.
MDT has strong social media presence: Facebook (two), Twitter (multiple), Instagram, Pinterest and YouTube.

VisitMO Spotlight Blog features guest bloggers.
Missouri Travel Guide

- MDT’s largest print asset
- 375,000 copies printed
- Distributed statewide, shipped nationally and globally
- 125,000 in Chicago/Louisville
- CY15 responses thru July: +57.4% -- printed additional 35,000.
VisitMO.com

- 2 million visits in CY14
- 5,500+ listings
- Trip Ideas, coupons, articles
- Festivals/events
- Seasonal Highlights
- Sign up for eblasts
Missouri Welcome Centers

- Located at nine key entry points to State: Hannibal, Hayti, Joplin, Kansas City, Eagleville, Rock Port, St. Louis, plus 2 at Conway
  - 500,000+ visitors
  - Front-line tourism ambassadors

VisitMO.com
I. **Marketing Matching Grant:**
50/50 match for paid advertising (certified DMOs on county level)

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

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

- Leveraging Brand USA’s $200M annual international marketing investment, MDT has underwritten 16 native language videos and articles translated into 9 languages on VisittheUSA.com and supported the BUSA Inspiration Guide (Travel South USA section) as well as integrated media projects in Canada and UK.
Missouri joined TSUSA in 2014 – The North of the South

New regional cooperative print/web/social, media influencer tours and food events: Food Network, Budget Travel, Garden & Gun, others

TSUSA International and Domestic Showcases
Tourism Industry Education

• FREE access to weekly live webinars and unlimited 24/7 access to 80+ recorded webinars
• 300+ MO industry members have signed up
• Go to Industry.VisitMO.com for password and information.
• MO Film Office promotes MO locations for shooting for film, television, web and digital media. Assisted 142 projects in FY14 inc. 20th Century Fox’s Gone Girl filmed in Cape Girardeau the Fall of 2013

• Companies/TV shows that filmed MO in 2014:

GARMIN
WIFE SWAP
Discovery NETWORKS
NATIONAL GEOGRAPHIC
AMERICAN NINJA WARRIOR
GHOST ADVENTURES
HGTV START AT HOME
Américas Got Talent
Food Network
BAR RESCUE
LET'S ASK AMERICA
CNN
COMEDY CENTRAL
ESPN
THE VOICE
FOX SPORTS
PBS
Travel channel
NFL Films
The Biggest Loser
Sprint
McDonald’s
Enterprise rent-a-car
The HISTORY CHANNEL
Ford
MONSTERS INSIDE ME
LIFETIME NETWORKS
THE BACHELOR
THANK YOU!

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