

Visit Big Sky

**2020 Virtual
MARKETING OUTLOOK
MEETING**

THURSDAY, MAY 7TH | 11:30 AM - 1:30 PM

[VISITBIGSKY.COM/MARKETINGOUTLOOK2020](https://visitbigsky.com/marketingoutlook2020)

Meet Our Guest Speakers



CAMERON SHOLLY
Superintendent
Yellowstone National Park



TAYLOR MIDDLETON
President & COO
Big Sky Resort



#SpiritofTravel

RISE [UP] BIG SKY

Visit Big Sky

Our Mission:

As the community's official destination management and marketing organization, Visit Big Sky leads the development and promotion of authentic tourism experiences through research and stakeholder collaboration to grow Big Sky's economy while balancing the need to sustain quality of life for its residents.

Our Strategic Priorities:

DEVELOP

a sustainable SUMMER outdoor recreation experience

PROMOTE

the destination to broaden Big Sky's reputation BEYOND world-class winter.

ESTABLISH

Visit Big Sky as the leader of the tourism collective.

STEWARD

The destination to manage the balance between consumption and preservation.

Spirit of



NATIONAL TRAVEL & TOURISM WEEK

MAY 3-9, 2020

The background of the entire image is a dark blue field populated with numerous 3D renderings of COVID-19 virus particles. These particles are spherical with a textured, bumpy surface and are covered in many small, protruding spike proteins. The particles are rendered in various shades of blue and purple, with some appearing more brightly lit than others, creating a sense of depth and movement.

VISIT BIG SKY

#Rise[Up]BigSky

COVID-19 UPDATES

March 12th, 2020

STATE OF MONTANA
OFFICE OF THE GOVERNOR
EXECUTIVE ORDER No. 2-2020

EXECUTIVE ORDER DECLARING A STATE OF EMERGENCY TO EXIST WITHIN
THE STATE OF MONTANA RELATED TO THE COMMUNICABLE DISEASE
COVID-19 NOVEL CORONAVIRUS

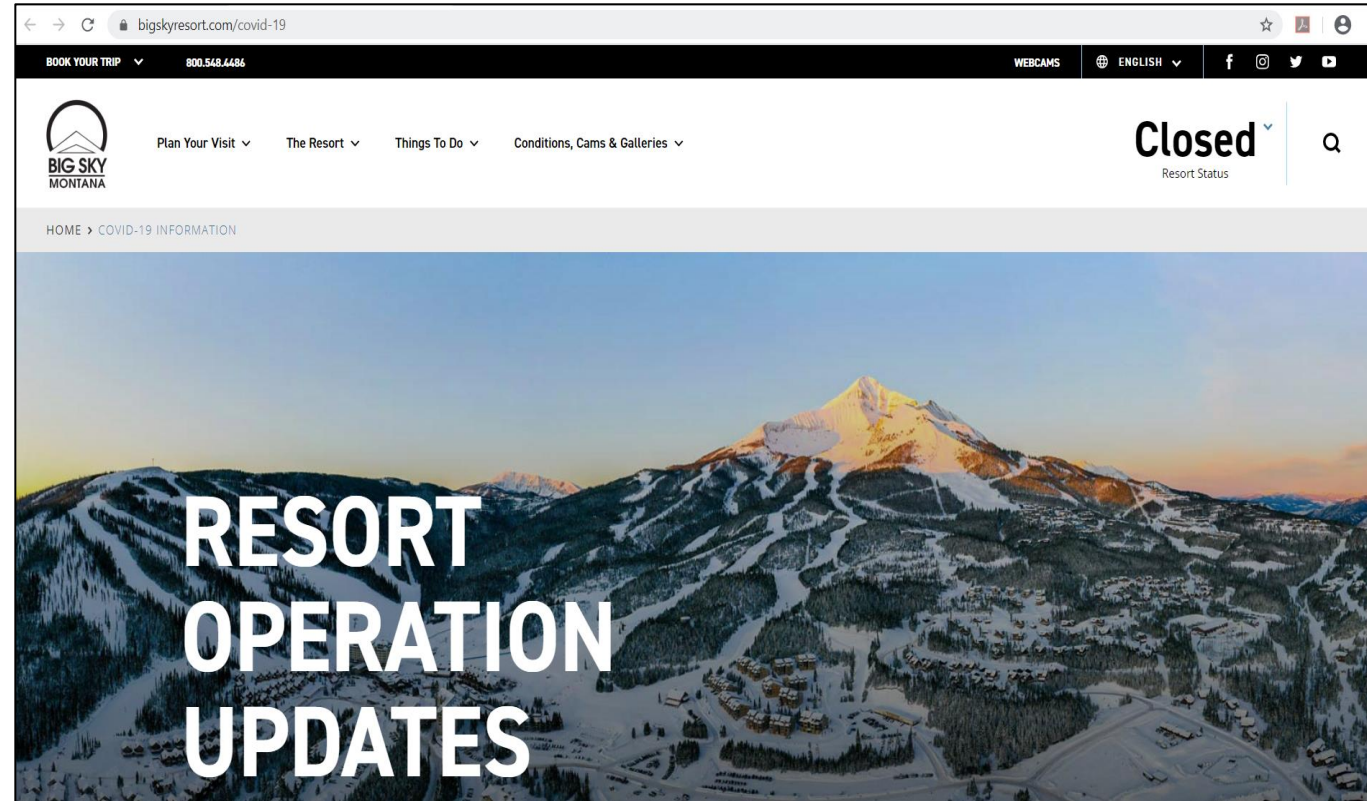
WHEREAS, the World Health Organization has declared the worldwide outbreak of COVID-19 Novel Coronavirus a pandemic;

WHEREAS, as of March 10, 2020, the United States Centers for Disease Control and Prevention (CDC) indicates there are over 125,000 confirmed cases of COVID-19 worldwide with over 900 confirmed cases in the United States;

WHEREAS, the Governor of Montana has declared a State of Emergency to exist within the State of Montana related to the communicable disease COVID-19 Novel Coronavirus;

WHEREAS,

WHEREAS, the Governor recognizes the need to take immediate action to protect the health and safety of the people of the State of Montana;

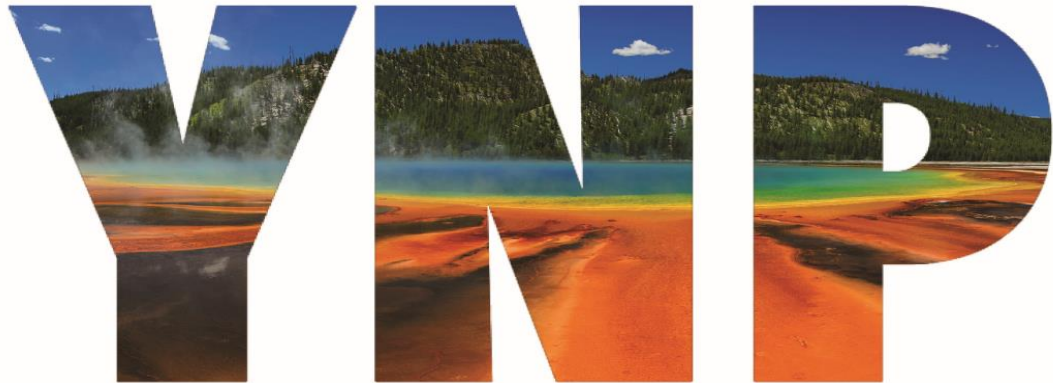


March 16th, 2020



KBZK.COM

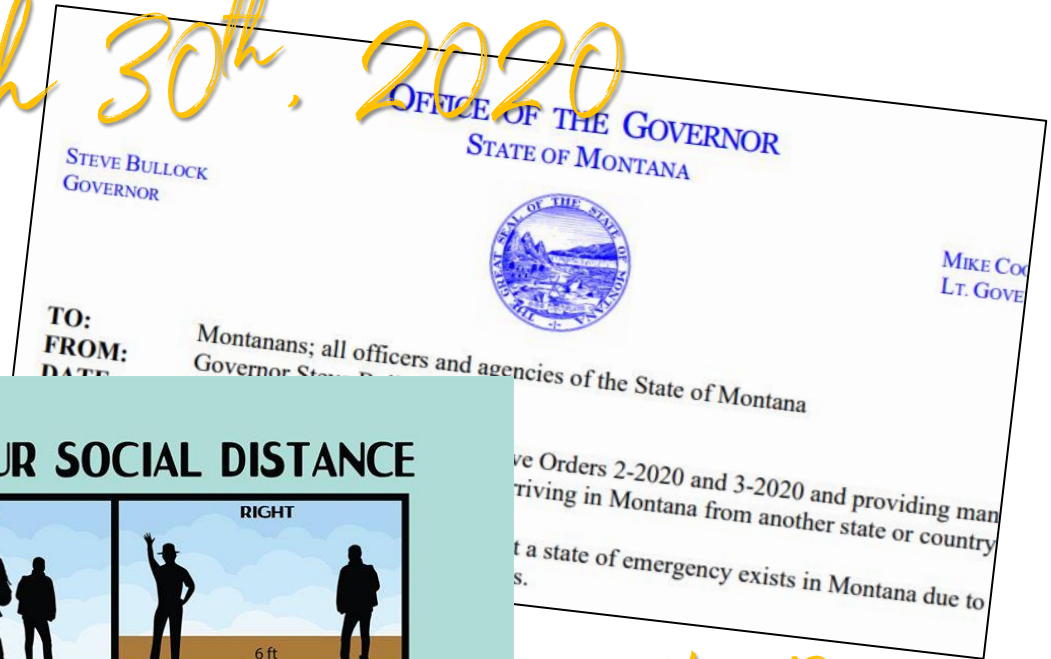
Yellowstone National Park is closed to all visitors until further notice



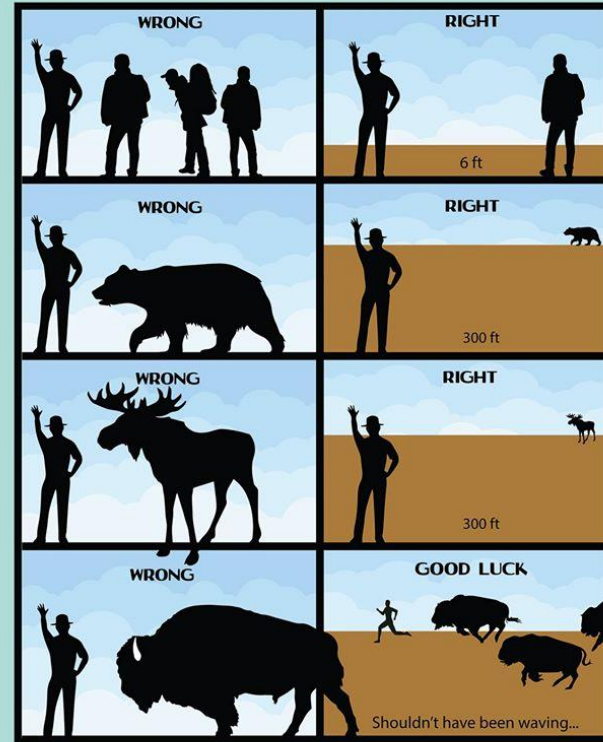
UPDATES ON OPENINGS & CLOSURES

CORONAVIRUS NOTIFICATIONS FOR PUBLIC SAFETY

March 30th, 2020



KEEP YOUR SOCIAL DISTANCE



KEEP WILDLIFE WILD

14-Day
Self-
Quarantine
for Out of State
Visitors

Montana 4% Lodging Facility Use Tax Collections

Montana Code Annotated 15-65-101

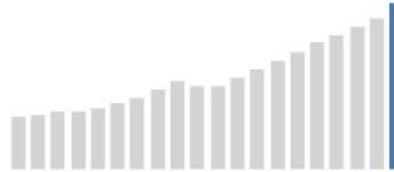


Statewide Collections | FY 2019

Click on bars to change years

\$35,106,098

▲ 10% year-over-year



Tourism Region Collections | FY 2019

Click on arrows to see counties

▶ Yellowstone Country

\$13,162,018 | ▲ 13% yoy
37% share of collections

▶ Glacier Country

\$11,004,512 | ▲ 10% yoy
31% share of collections

▶ Southeast Montana

\$4,570,642 | ▲ 4% yoy
13% share of collections

▶ Southwest Montana

\$3,550,923 | ▲ 8% yoy
10% share of collections

▶ Central Montana

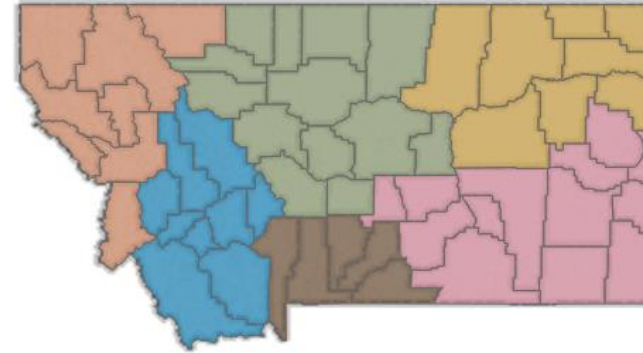
\$2,316,377 | ▲ 4% yoy
7% share of collections

▶ Missouri River Country

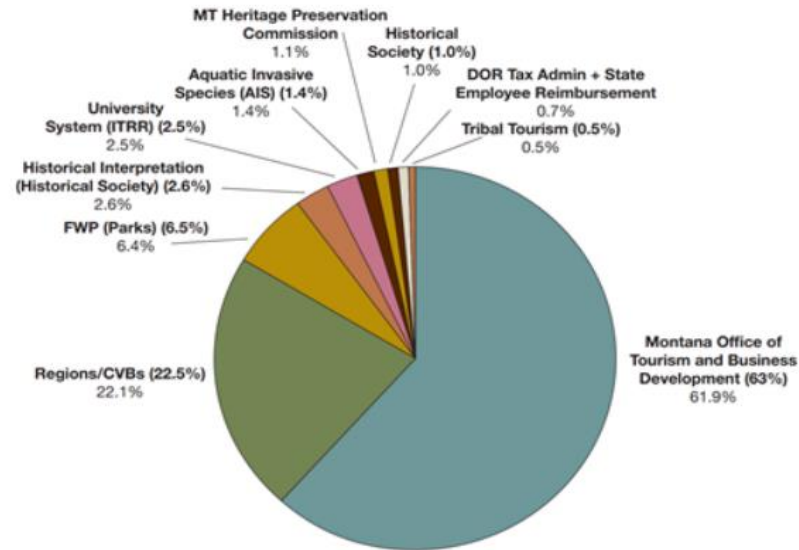
\$501,627 | ▲ 8% yoy
1% share of collections

Tourism Region Reference Map

Hover over a county for reference information



Distribution of 4% Lodging Facility Use Tax* (+)



*The percentage in parentheses represents the percentage indicated in statute from MCA 15-65- 121. The percentage not in parentheses indicates the effective rate after the costs related to \$400,000 to the Montana Heritage Commission, Department of Revenue administrative costs and state employee reimbursement is taken off of the top before the percentages in MCA 15-65-121 are applied. The total collection amount comes from the Legislative Fiscal Division projections for the 2019 Legislative Session.

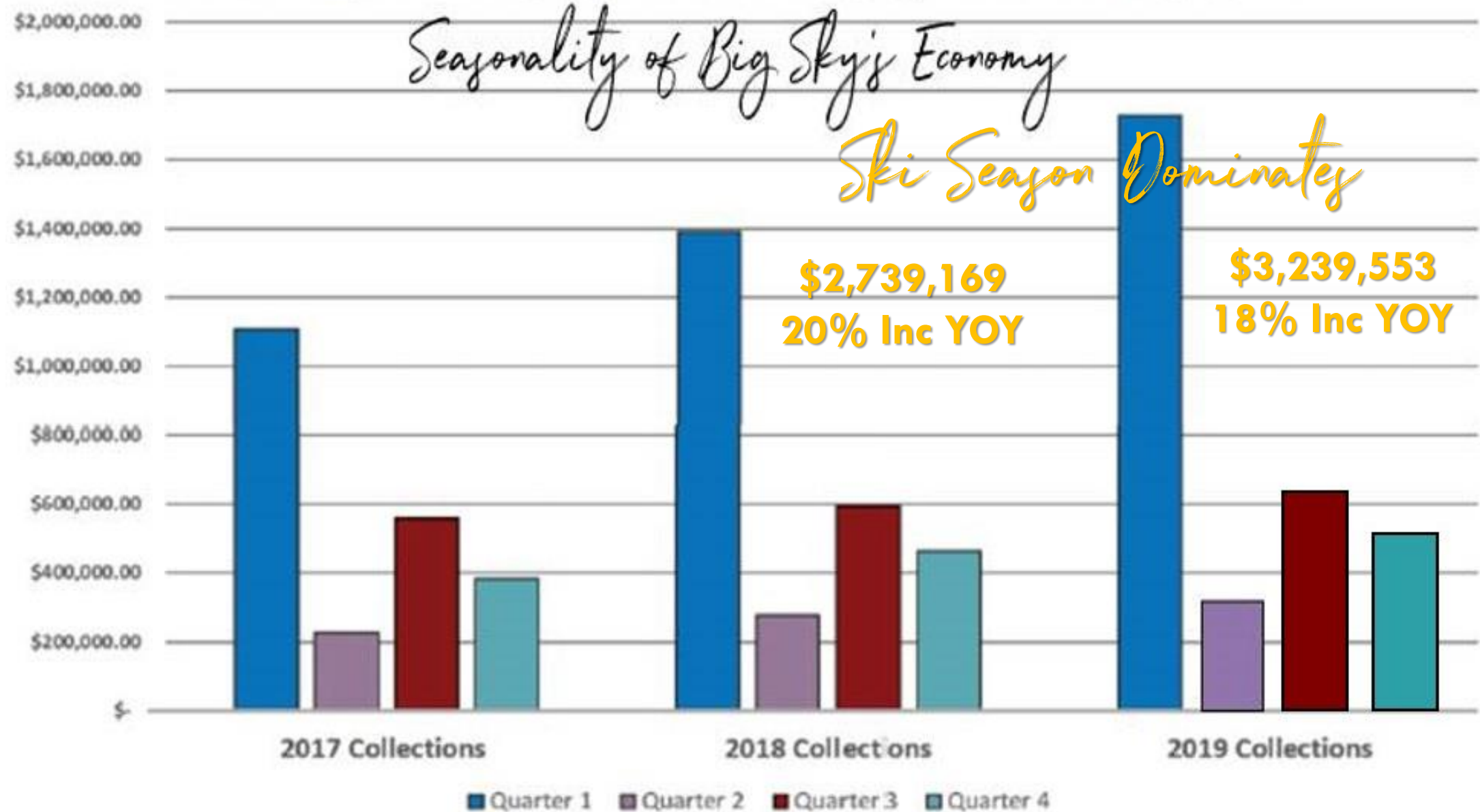
Fiscal or Calendar Year
Fiscal Year

Year
2019

Big Sky's
Tourism
Region

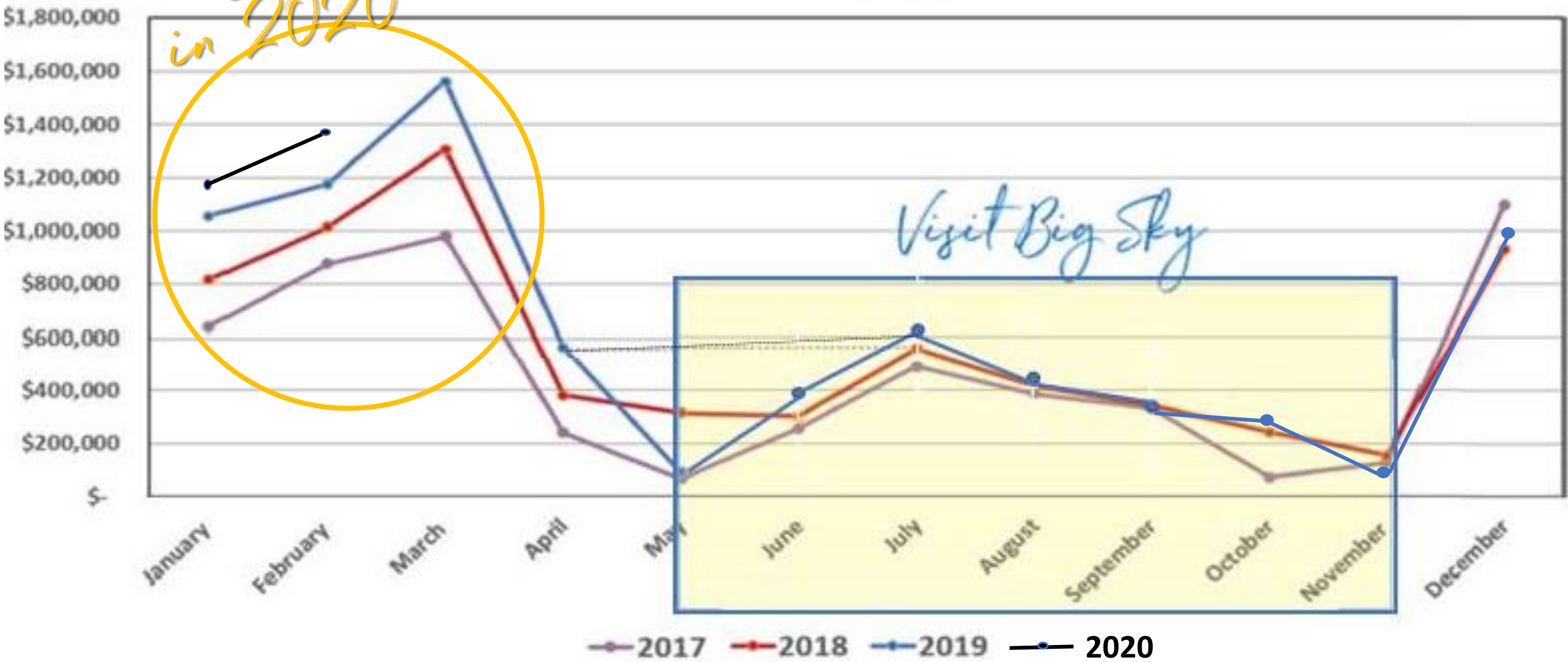
Big Sky Resort Area District

MT Facility Use Lodging Tax Revenue (4%) Collections by Quarter



*Pacing Ahead
in 2020*

Big Sky Resort Area District Resort Tax Collections by Calendar Year 2017-2019 (May)





THE BIGGEST SKIING IN AMERICA®



Tourism Vital Signs



Visit Big Sky

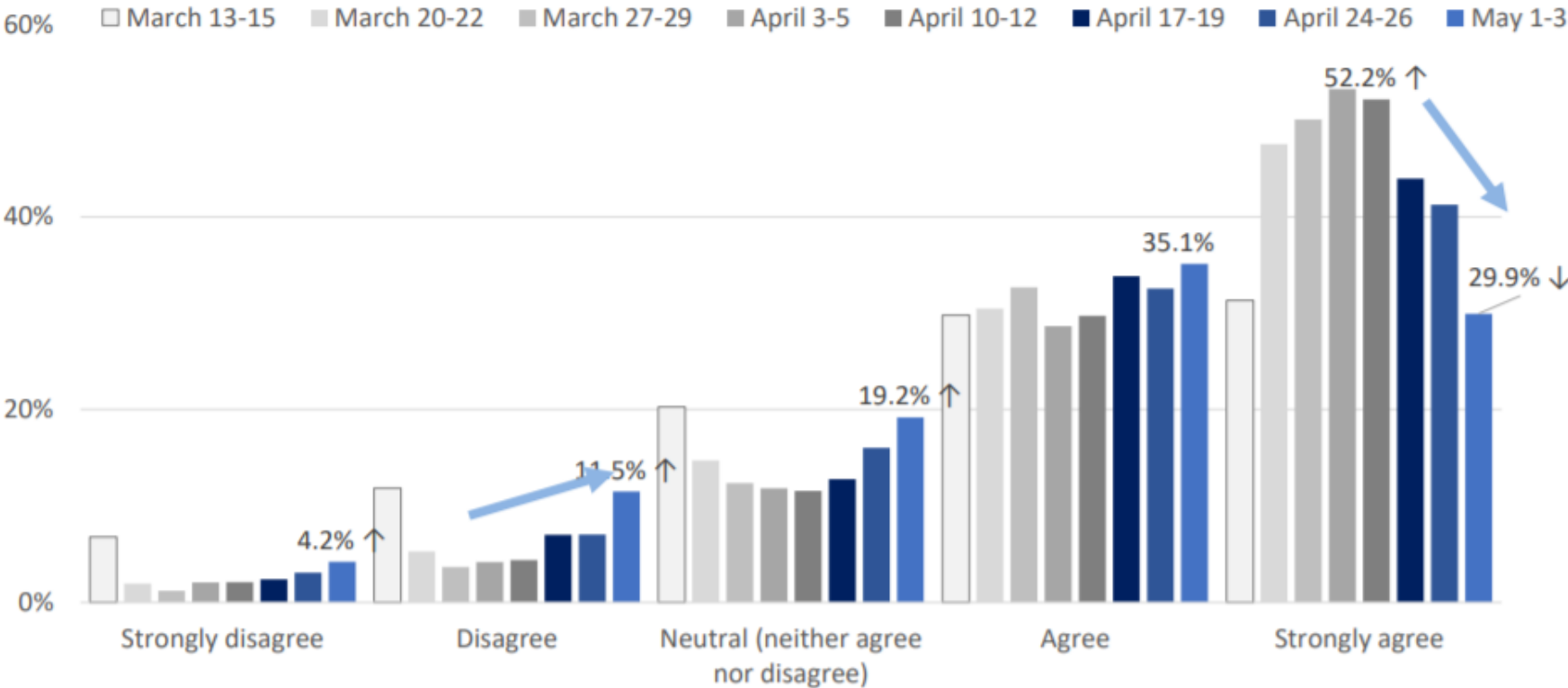
Destination Analysts: Wave (8): May 1-3

Avoiding Travel Until the Crisis Blows Over

How much do you agree with the following statement?

Statement: I'm planning to avoid all travel until the coronavirus situation blows over.

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208 and 1,204 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 2020)



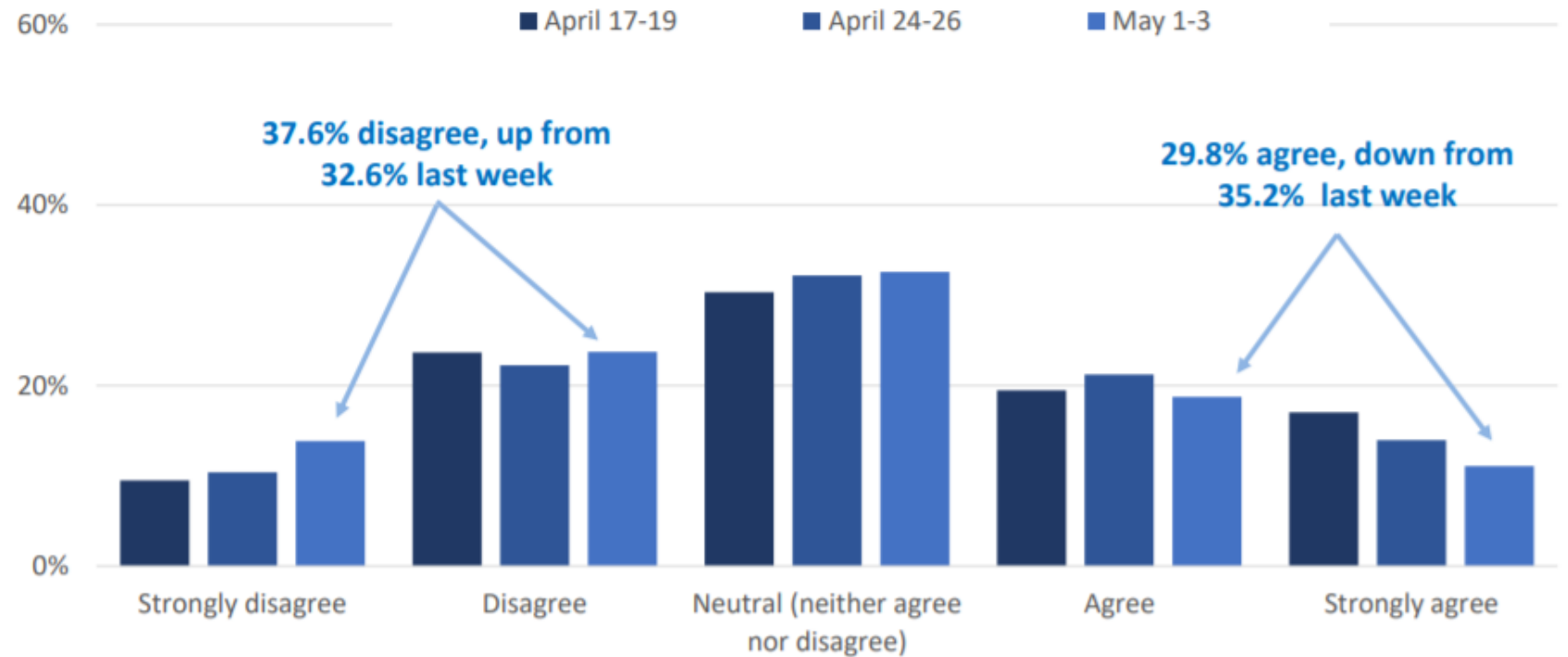
Won't Travel Without Vaccine

How much do you agree with the following statement?

Statement: I'm not traveling until there is a vaccine.

(Base: All respondents, 1,238, 1,208 and 1,204 completed surveys. Data collected April 17-19, 24-26 and May 1-3, 2020)

Question Added in Wave 6



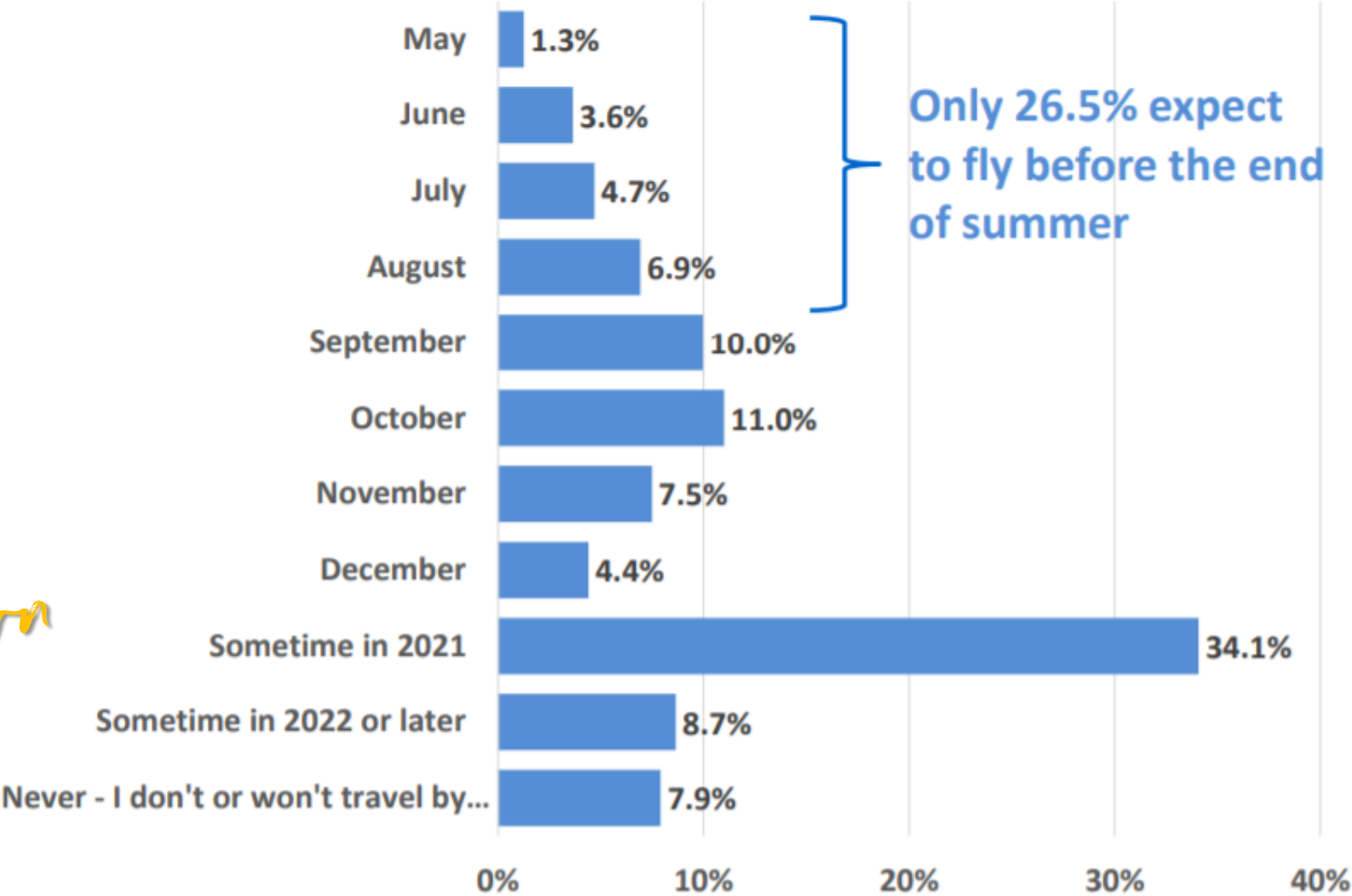
Next Flight on a Commercial Airline

Question: In what month do you expect you will take your NEXT TRIP on a commercial airline?

(Base: All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)

Question Added in Wave 8

BZN - May down
95% YOY

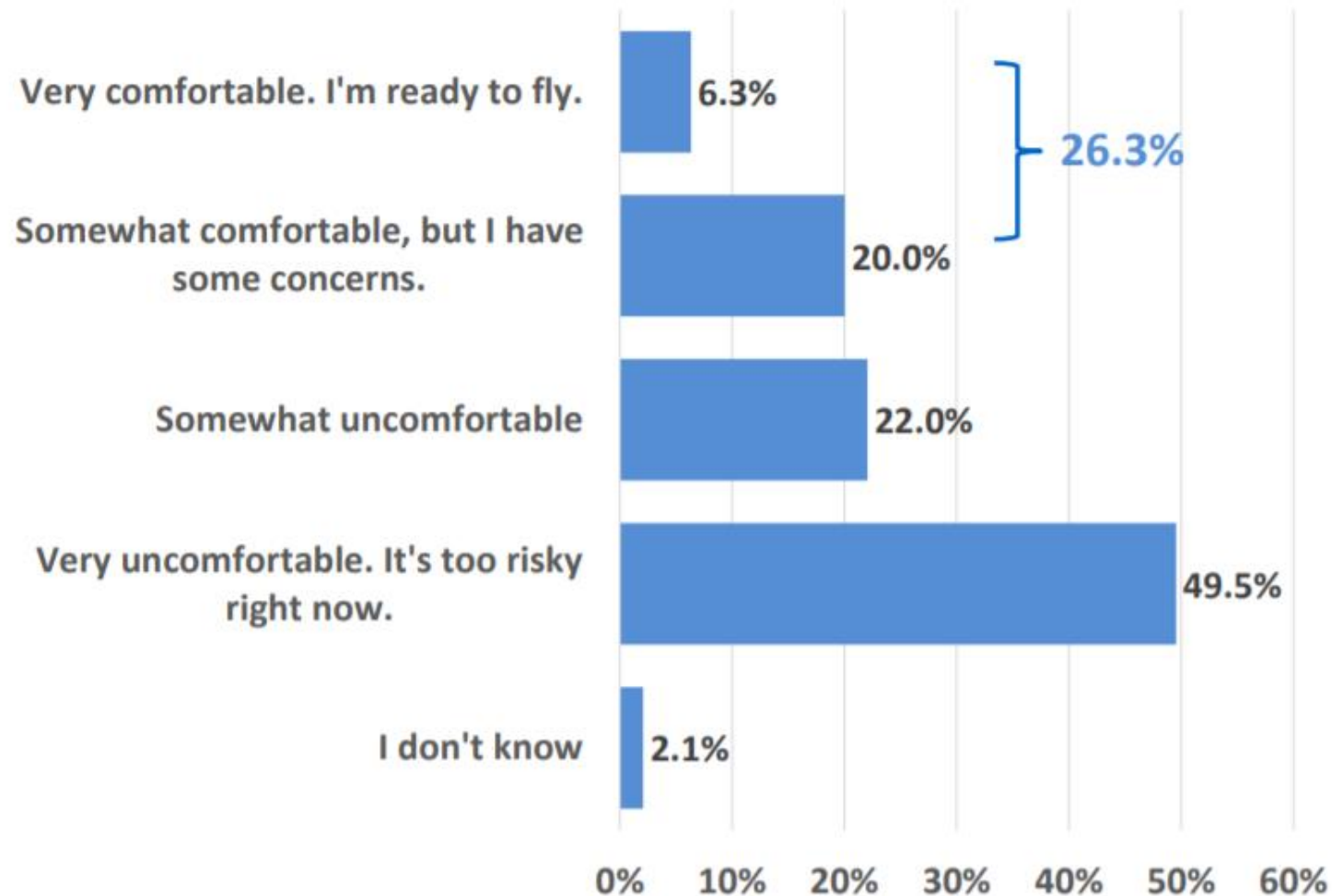


Readiness to Fly on Commercial Airlines

Question: Which best describes how you feel right now about traveling on a commercial airline?

(Base: All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)

Question Added in Wave 8

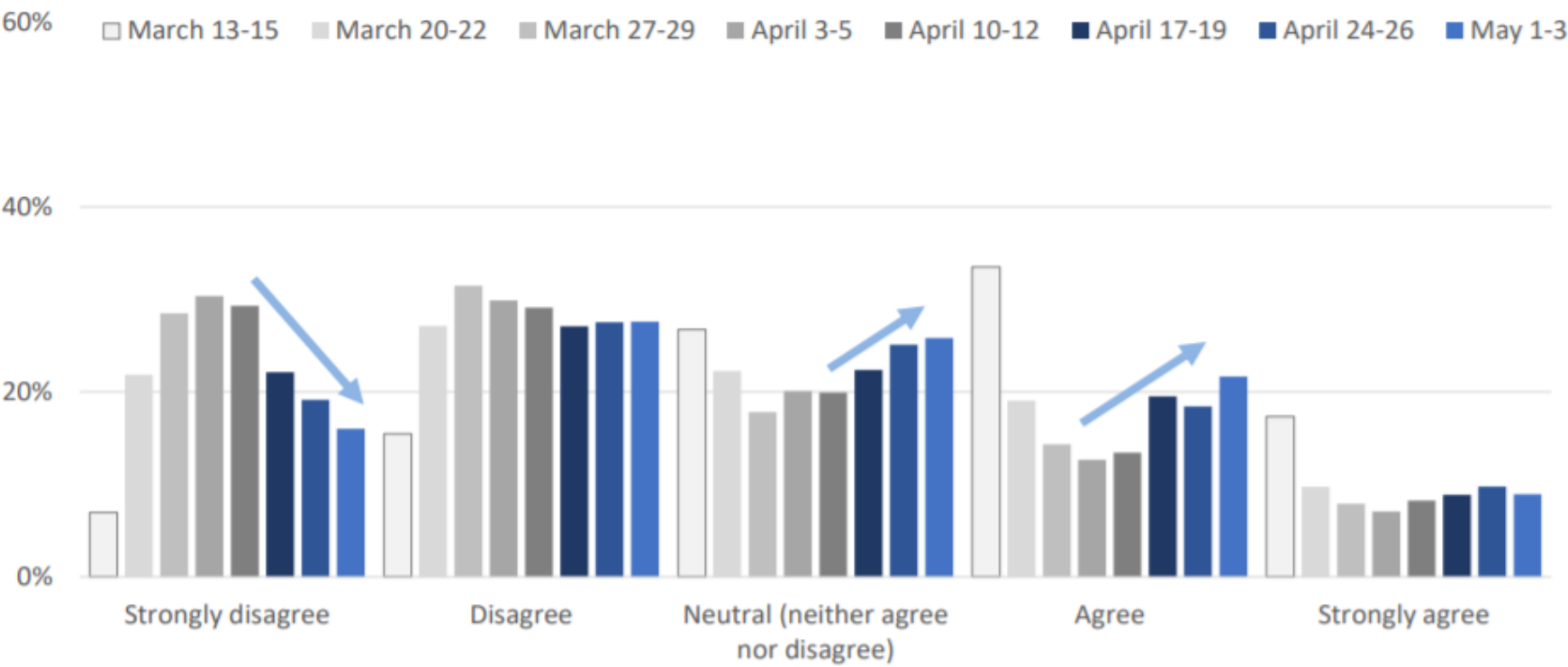


Comfort Enjoying Home Community

How much do you agree with the following statement?

Statement: I feel comfortable going out in my community to restaurants, local attractions and undertaking local activities.

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208 and 1,204 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 2020)

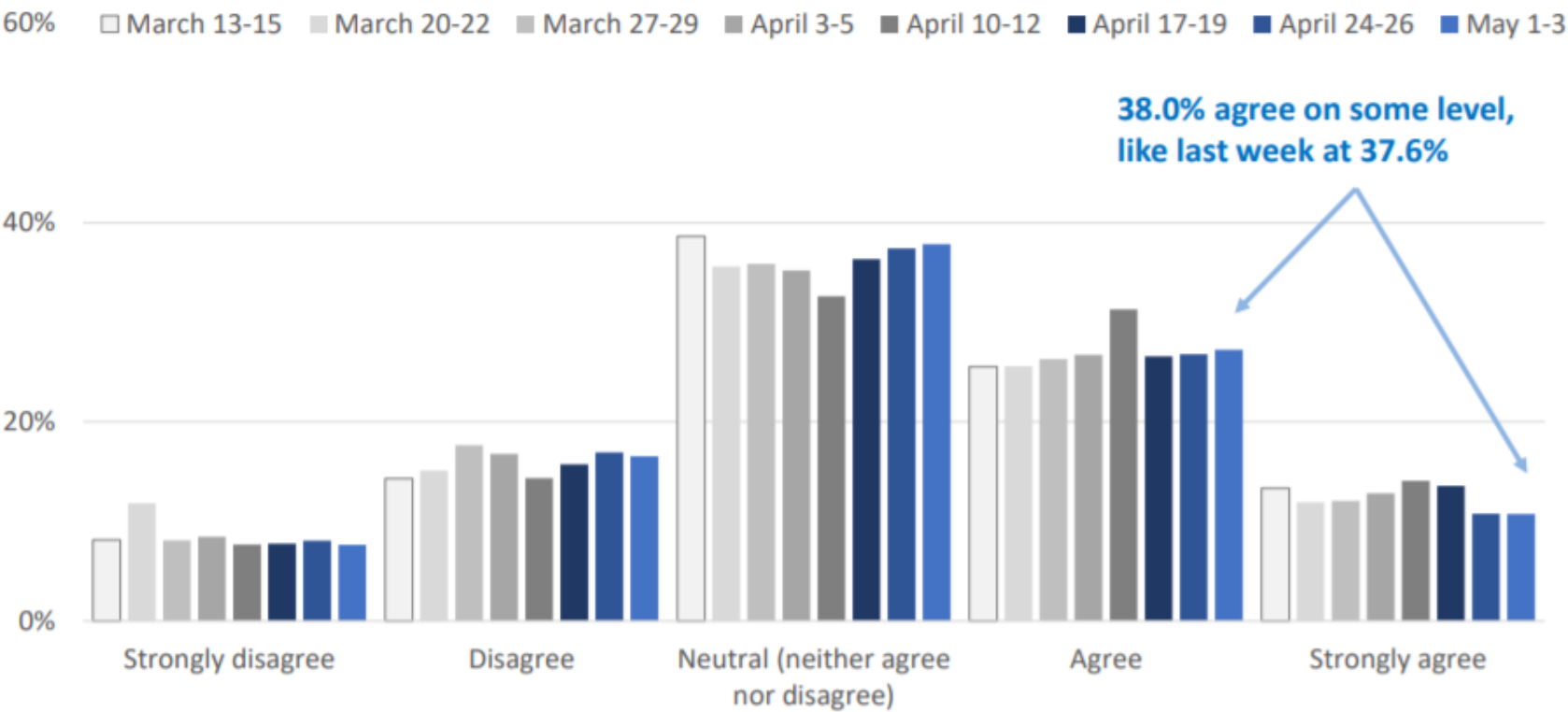


Replacing Air Travel With Road Trips

How much do you agree with the following statement?

Statement: Because of the coronavirus, I'll probably be taking more road trips this year to avoid airline travel.

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208 and 1,204 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 2020)



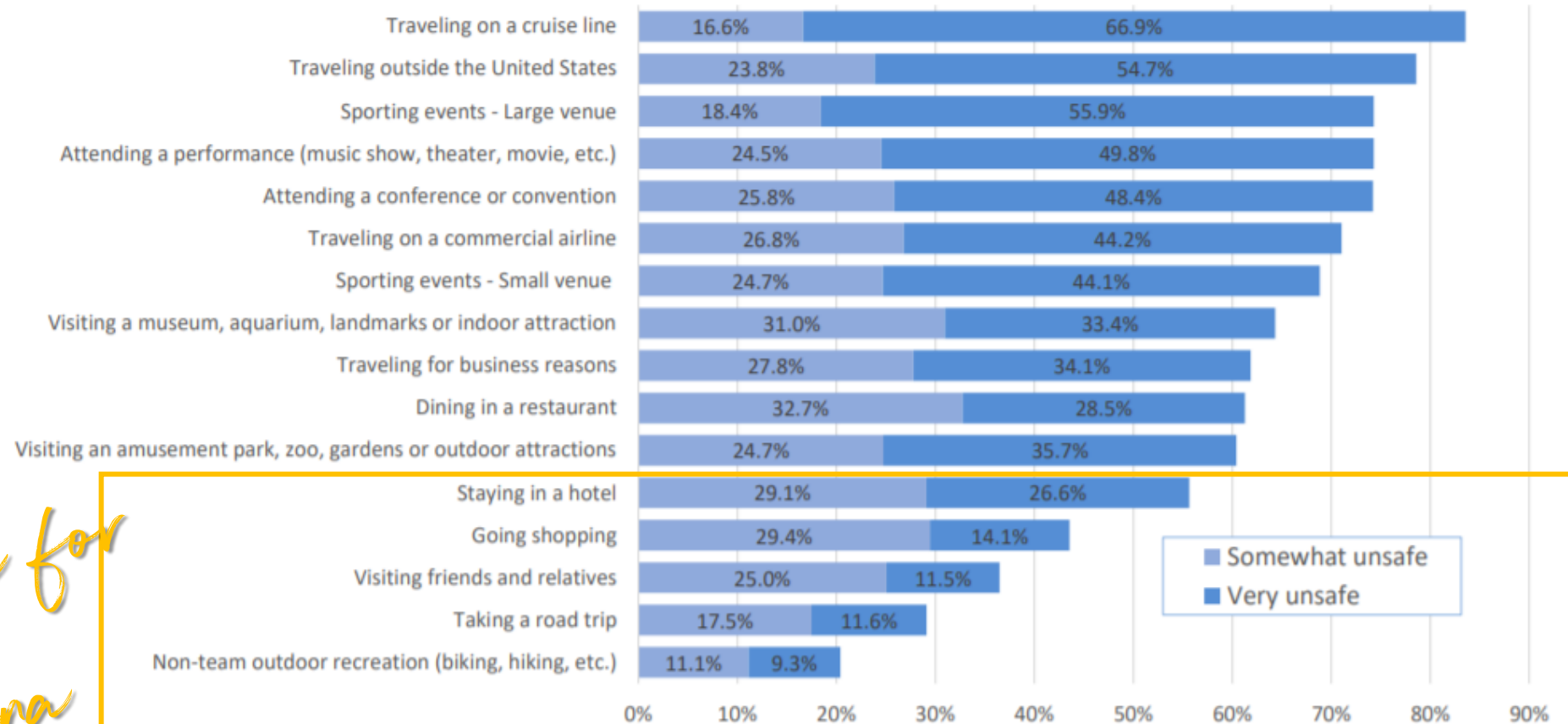
Perceived Safety of Travel Activities (Wave 8)

Question: At this moment, how safe would you feel doing each type of travel activity?

(Base: Wave 8 data. All respondents, 1,204 completed surveys. Data collected May 1-3, 2020)

Good news for Montana

Wave 8 (Collected May 1-3)





Visit Big Sky **MT**

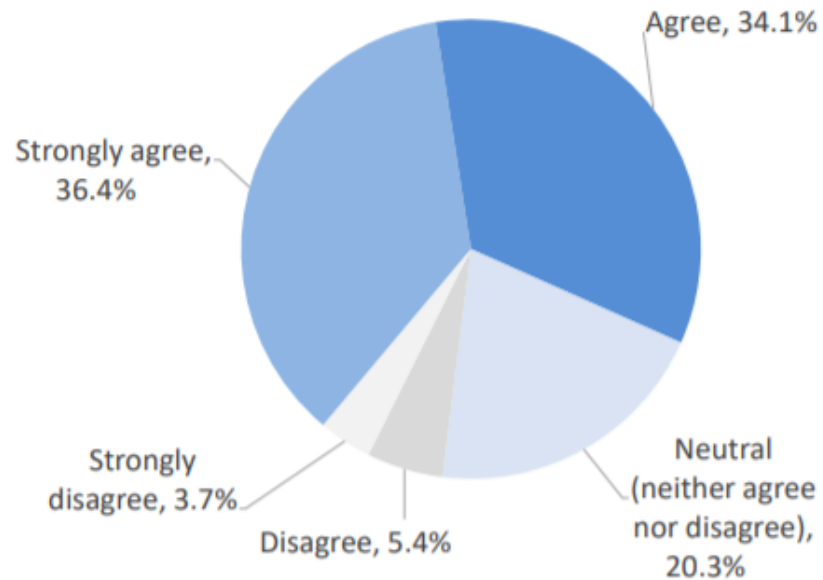
The Montana Brand Pillars:

1. **More spectacular, unspoiled nature** than anywhere else in the lower 48
2. **Vibrant and charming small towns** that serve as gateways to our natural wonders
3. **Breathtaking experiences by day, and relaxing hospitality at night**

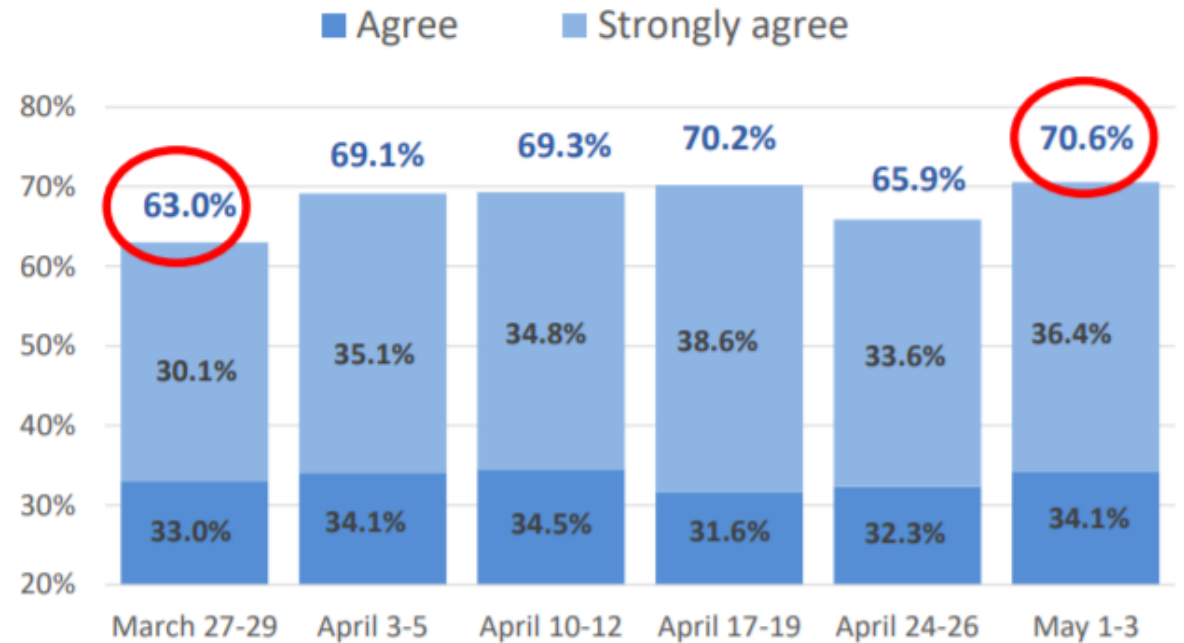
Excitement to Get Back to Travel

How much do you agree with the following statement?

Question: I miss traveling. I can't wait to get out and travel again.

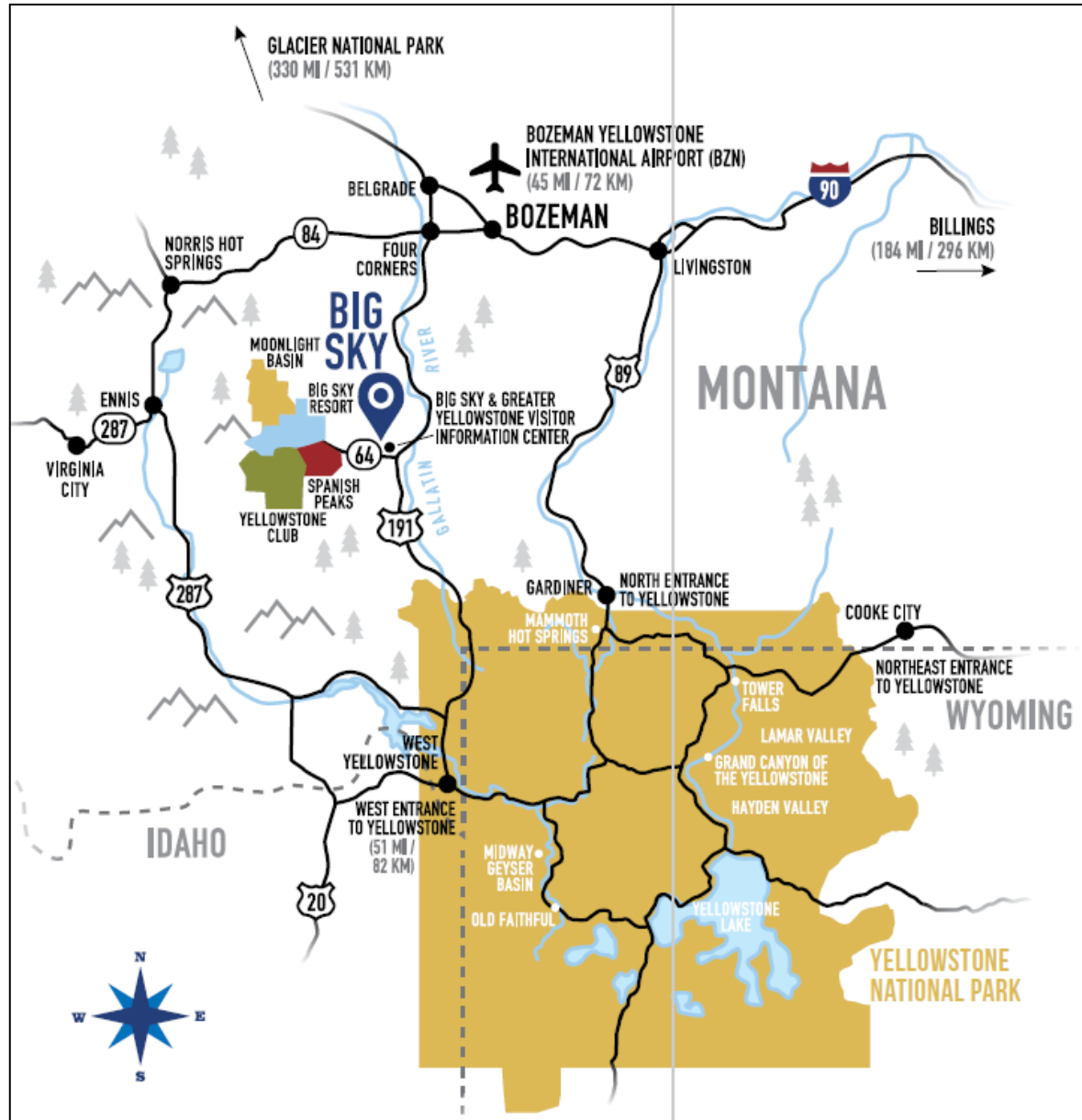


(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208 and 1204 completed surveys. Data collected March 13-15,, 27-29, April 3-5, 10-12, 17-19 and 24-26, 2020)



#SpiritOfTravel

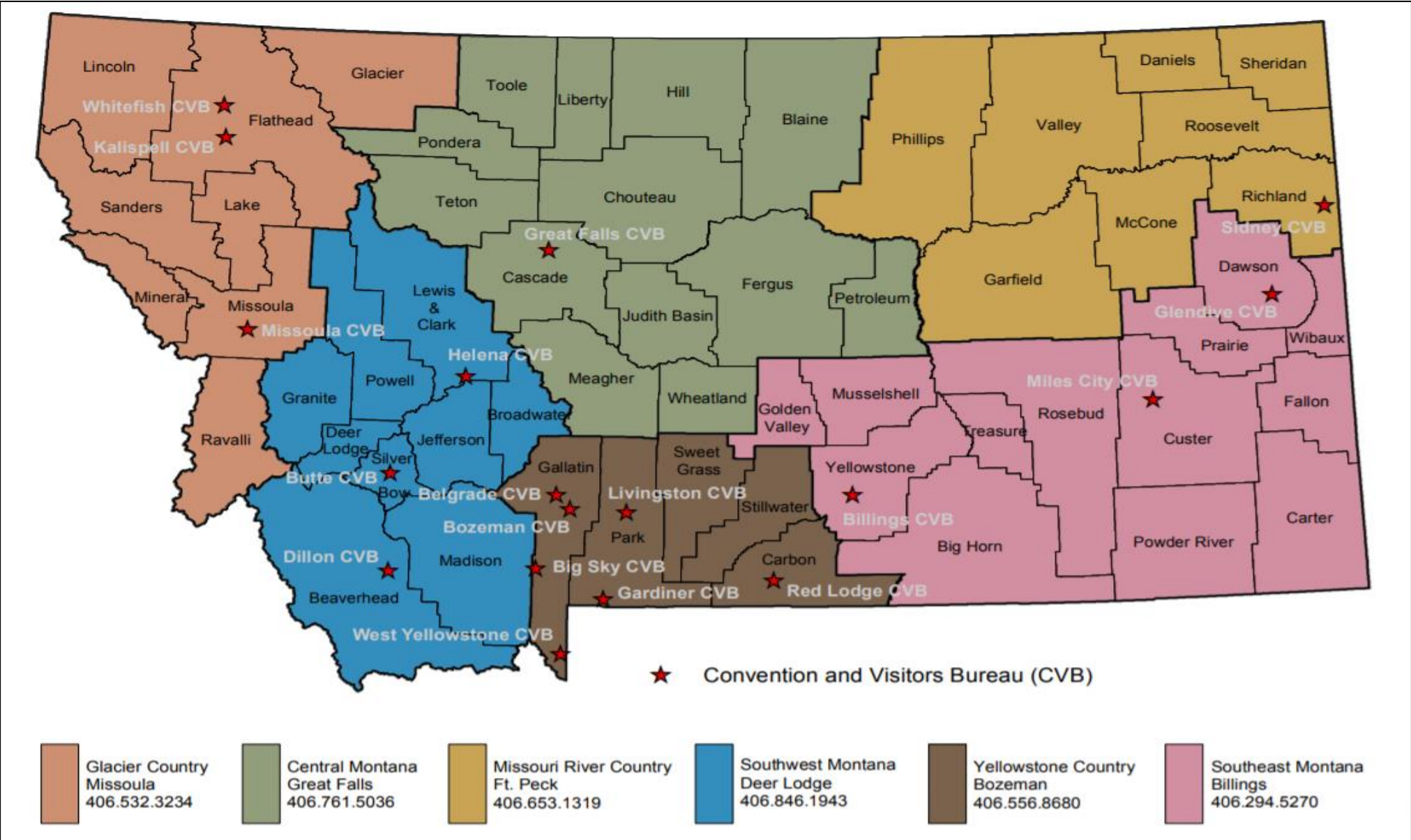
Greater Yellowstone Region



Big Sky's DNA:

1. **R-Destination:** Outdoor Recreation and Respect for the place
2. **Gateway Community to Yellowstone National Park;** Less than an hour's scenic drive from the most-trafficked West entrance
3. **Unparalleled Accommodations** for all budgets from affordable to ultra luxurious
3. **Diverse Dining Options**

Montana Resident Travel



Montana Office of Tourism and Business Development

Non-Resident Travel; Warm Season 2019



INSPIRATIONAL Social





Can't Wait to
See You Here!

Thank You

Visit Big Sky

Big Sky, MT

NTTW
NATIONAL TRAVEL & TOURISM WEEK
MAY 3-9, 2020