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### Winter Marketing Initiative: Missoula Convention and Visitors Bureau: Phase One Focus Group Results

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WINTER MARKETING INITIATIVE  
MISSOULA CONVENTION AND VISITORS BUREAU

PHASE ONE  
FOCUS GROUP RESULTS

by  
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Research Report 34

Institute for Tourism and Recreation Research  
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The University of Montana

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## EXECUTIVE SUMMARY

The Missoula Convention and Visitors Bureau (CVB) is concerned about preserving Missoula's unique qualities while encouraging visitors to make Missoula their destination. Winter has historically proven to be a slower time for many businesses, including those in the tourism industry. In support of the CVB and its desire to strengthen the winter tourism season, the Institute for Tourism and Recreation Research (ITRR) is conducting a two-phase project. Phase One, described herein, is a qualitative assessment of current CVB efforts and market segment desirability. Phase Two is a quantitative description of current non-resident visitors to Missoula.

Phase One concentrates on collecting information that will help the CVB better serve the winter tourism marketing needs of Missoula area businesses. Three focus groups, composed of individuals from the Missoula business community, considered three major questions:

- What are the perceptions of the CVB?
- Who is the ideal visitor?
- Which winter markets are most desirable?

Perceptions within the organization itself reflect a general lack of communication from the CVB to its members. Active members seem to have an individual sense of contribution, while non-active members felt that the CVB serves a select few rather than all businesses that are CVB members. Non-CVB members, concerned about the loss of a quality lifestyle as a result of growth, expressed that the CVB needs to represent the interests of the small, locally-owned, uniquely Missoula businesses rather than national chains. A common perception is that CVB membership is not a good value.

Participants suggested that nearby markets, within a 300-mile radius, produce "good visitors" who respect the local way of life and spend money in a variety of Missoula area businesses. The groups suggested that marketing should work to create an image that draws in good visitors and doesn't threaten Missoula's "flavor." Missoula's unpredictable weather suggests that marketing solely on weather-dependent activities may be unwise.

General recommendations, based on this study, are to establish more open communications between the CVB and Missoula area businesses, promote non-weather-dependent activities to a regional market, and continue to seek ways of preserving and marketing Missoula's uniqueness.

## BACKGROUND INFORMATION

The Missoula Convention and Visitors Bureau (CVB) is a division of the Chamber of Commerce. The CVB markets Missoula as a destination for visitors, repeat-visitors, and group tours. Missoula is also marketed as a location for motion picture and television filming, sporting tournaments, and cultural or special events. Although the CVB receives funding from member dues, its success depends upon input from all Missoula area businesses. Ideally, a new marketing plan is developed with a noteworthy amount of public input in order to promote the most socially viable markets that are appropriate for the community.

Wintertime, a highly segmented season, is the focus for this project due to a general consensus that the winter months are significantly slower for most businesses. The major question is which wintertime market segments best serve Missoula area businesses. The opinions and comments of business groups, other than the CVB, have been sought to provide a more unified direction for the winter marketing initiative, and to show that the CVB is interested in the success of all Missoula businesses.

A focus group format was used as a means of gathering information. Focus groups provide a depth of understanding impossible to gain through survey research, which assumes that individuals know how they feel at the time of questioning. Rather, the focus group format has tapped into participants true opinions to examine the strengths and weaknesses of specific marketing issues and to verbally clarify perceptions of past marketing actions. The ideas, opinions, and comments of business members have been explored to identify the success of the CVB, and how the CVB might be improved to serve Missoula area businesses. This study focused on the acceptability of specific winter markets from business and social perspectives.

Three focus groups comprised members of the Missoula business community. Two of these groups were Chamber of Commerce members. Focus Group One included Chamber members who were CVB Members, and Focus Group Two included Chamber Members who were not CVB Members. CVB members are those Chamber members paying additional dues to support tourism related programs and projects. Focus Group Three was composed of business representatives that do not belong to either the Chamber or the CVB. (Participants are listed in Appendix II.)

## RESULTS

The following pages elucidate the questions and responses recorded during the three Focus Groups. Italics indicate unedited participant quotes.

### Why Missoula?

The participants were asked at the beginning of each Focus Group Session to introduce themselves and to describe what they liked most about living in the Missoula area. All of the participants voiced similar reasons for living in Missoula; Missoula is a centrally-located, small town that benefits from its close proximity to major attractions like Glacier and Yellowstone National Parks. The scenery, outdoor recreation, and country flavor are some of the best liked qualities inspiring the participants to ask themselves, "Why live anywhere else?"

*I like the access for recreational activities. There are so many neat things to do around here.*

*I like Missoula because it is a mountain valley town. I love the scenery, the outdoor activities, and it is just the right size.*

*What I like about Missoula is that it is centrally-located in the state. It is a good spot for hiking, skiing, and hunting.*

However, as Missoula grows, so does the concern about maintaining a quality lifestyle. Focus Group participants were worried that Missoula may experience negative changes related to growth.

*What I like about Missoula is that it used to be small enough and it wasn't too bad, but now it is getting so big...I think it's time to move on.*

*I like Missoula's friendly atmosphere. It is the kind of city that offers a variety of activities and it is growing a bit, perhaps too much. I hope we continue to monitor the growth, I have roots sunk here.*

*I was born right where the library stands. I enjoy fly fishing and skiing and I've seen a whole lot of changes happen over the years, some are concerning, some are exciting. Those things which I have liked most have been in years past, now there is a growing cold-hearted feeling.*

*I like the lack of stressful living, although we're changing this, and that part I don't like.*

The two Focus Groups unaffiliated with the CVB were most concerned about growth. Participants in these two groups were either native to the state or had moved to Missoula in search of a non-stressful, small town atmosphere.

### **Winter and Wintertime Season Business**

Participants were asked about the characteristics of the winter season and wintertime business. It was generally noted that with the exception of skiing, snowmobiling, or ice-fishing, winter in Montana can be as "gloomy" as the outlook for wintertime business. Many associate poor air quality with poor business when expressing their opinions about the season.

*You definitely have to find some fun things to do in the winter or you just won't stay here.*

*I think winter can be very depressing because of all the inversions that we get. It brings down a lot of attitudes. And it is at these times when people in my business feel they just have to get out of here.*

*Winters in the Bitterroot are generally more sunny than in Missoula. The air takes some major getting used to when I come into town.*

Winter business profits showed a significant decline for most participants, with the exception of winter weather-dependent businesses such as ski resorts. The Focus Groups agreed that January and February had the largest declines in profits with some businesses experiencing only 35% to 45% of the business they enjoyed in other seasons. However, there do exist several minor winter business peaks due to airfare wars, holiday spending, and travel. These increases are short-lived and only benefit a few businesses.

*The first dive in business happens right after Thanksgiving, it comes back for a week or two early in December and then drops. From the end of December through February we just want to close up.*

*A universal thing we all share is how broke we are in January and I find that no matter how much money you spend on advertising there are no cars, people do not travel because they don't want to get caught in a blizzard, so why waste the money advertising this month?*

Wintertime moods become somber and consumers seem antagonized. The participants felt that many visitors blame the weather on the businesses themselves. Thus, there is a strong desire to attract people who are used to and do not worry about the season. Many expressed that this is only likely if we create a product that offers a positive perception of winter. The idea is that if people are having fun and their expectations are being met, then businesses will prosper.

### **The Good Visitor**

To create a marketing strategy that would be desirable for the Missoula community, Focus Group participants determined what kind of visitor they wished to attract. The groups discussed what constituted a "good visitor." Where does the good visitor come from, how long does the good visitor stay, how much does a good visitor spend during their stay, and what are the good visitor's interests? Participants also considered the attributes of undesirable visitors. By considering potential visitor profiles, it is easier to focus on markets that attract good visitors and avoid undesirable markets.

*A good visitor should visit for what we have and won't bitch about anything which we may not have.*

*We want to attract someone who is very attached to their own home and is not looking for a new place to move to.*

*Visitors must be clean and enjoyable and carry some environmental respect.*

*We need to attract widespread spending with fewer people staying longer and spending more.*

*A major social concern to me is to focus on the regional market because we are basically the same and besides, in the winter, Missoula air cannot handle much more.*

All groups reached a consensus on the characteristics of "the good visitor." First, acceptable wintertime visitors are from a regional market and are similar to Missoula area residents. Second, desirable visitors are people with disposable incomes who will visit Missoula in relatively modest numbers, stay more days, and spend money at a diversity of businesses. A longer stay by fewer visitors is viewed to be more important than a large number of visitors staying a short amount of time because money can be spent diversely with less crowding. Third, good visitors must respect Missoula for its unique culture. Fourth, when ideal visitors leave they will not want to move to Missoula, but they will want to visit again. Finally, good visitors must be amiable, willing to establish a friendly repose with local residents based on positive human interaction.

*I think that I am much like anyone in this room who is interested in sacrificing some extra business to preserve the quality of life I am accustomed to. And we do this by attracting a smaller market of people which we all consider to be very much like ourselves.*

**Identified Winter Markets**

Participants in each group were asked to identify all existing markets, with special attention being paid to wintertime markets. Facilitators suggested that the markets could be categorized three ways: geographically, demographically, or according to activity. The groups then brainstormed to create the following list of markets:

| <u>GEOGRAPHIC</u> | <u>DEMOGRAPHIC</u>    | <u>ACTIVITIES</u>           |
|-------------------|-----------------------|-----------------------------|
| Regional          | Honeymooners          | Outdoor Winter Sporting     |
| National          | Senior Citizens       | Indoor Sporting Tournaments |
| Canadian          | Friends/family visits | Cultural Entertainment      |
|                   | Business Travelers    | Conventions                 |
|                   |                       | Hunting and Fishing         |
|                   |                       | Gambling                    |

Amenities that affect these markets were also discussed such as medical services, food services, and real estate opportunities (a complete list of market-related categories as suggested follows in Appendix III).



## Preferred Winter Markets

Once the groups determined who the ideal visitor was and what markets were possible, the discussion focused on a combination of two concerns: what markets mentioned were of interest to the good visitor as well as in the best interest of the business community? The three groups generally agreed as to which winter markets they found most desirable and appropriate:

- All nearby areas within easy driving distance to Missoula (including northern Idaho, eastern Washington, and all of western Montana)
- Conventions, conferences, tournaments, and meetings
- Cultural and entertainment events

In addition, the potential of a Missoula ice-skating rink may also offer significant opportunities for attracting visitors, but was not expressed as strongly as those mentioned above. It is evident from each focus group, however, that the most appropriate group to market to are those who live within about a 300-mile radius. Participants felt that these people resemble Missoula residents and should be encouraged to make more trips or longer trips to Missoula.

*Doesn't everyone find that in the winter you can draw a circle with a 200 or a 300 mile radius around Missoula and this is where 95% of all our business comes from. There is not much sense on focusing advertising for anyone else out of this region. The winter is different and the market is right here.*

*Athletics shouldn't be overlooked either, you just have to compete with other communities to bring in events. This is a major source of revenue.*

*So many people, they are just like us in the winter, they get winteritis, but they can't afford to go too far. Whether you are minutes away or from Kalispell, or Butte, or maybe even Spokane, we've got tournaments, shopping, restaurants, medical, and the things the smaller town doesn't have.*

Some participants questioned whether snowmobiling and skiing were wise marketing priorities due to the unpredictability of Missoula's winter weather. There was also some concern that visitors participating in these markets may make most of their expenditures in other areas (Lolo Pass, Seeley-Swan Valley, etc.) and not benefit Missoula and Missoula-area businesses.

*The winters are not as bad, as far as coldness and snow, as we often make them out to be. Marketing winters is something I've wrestled with for over twenty years. You can't schedule a weather-dependent activity here, it's just not consistent.*

*Missoula has been marketed as a destination in the winter travel and ski market, but most just stay to shop and then go to Big Mountain in their rental cars.*

*If you could market Missoula as a theater town or a carnival fun town, you could create a diversity of spending for businesses as a whole without relying on snow conditions...then I think we may have a chance at doing something.*

Participants agreed that cultural and calendar events should be scheduled carefully throughout the winter months to attract a steady base of visitors. Some participants perceived that several events seemed to happen on a single weekend, taxing the capacity of Missoula businesses, while no events were scheduled on adjacent weekends.

*I just dream that there is one place in town that everyone knew about and it was a huge calendar, every time you wanted to plan something you can look at the calendar and coordinate your plans with whatever event is in town.*

All groups felt that Missoula must be marketed for its uniqueness by adopting an image upon which the community might capitalize. A planning process was suggested to involve the public and businesses in the creation of a winter theme for Missoula. This theme could build community spirit for residents while attracting visitors from a regional market.

*We have to create an image or an expectation for our visitors. Then they can take it or leave it instead of just cutting it down because they don't know what we are all about.*

*We need to identify an image, something to offer so an expectation is created and we are given the goal of meeting the visitors' expectations of this image and nothing more.*

Group participants wished to see Missoula's present attractions like gambling, shopping, dining, and entertainment made even more attractive by offering increased incentives through concentrated marketing within the region. However, marketing often has social impacts that may override wanting to attract more people, for example, congestion problems such as parking and excessive foot traffic. There was also concern about impacts increased visitors may have on Missoula's tenuous air quality.

*Use some political clout to improve the traffic problems which lead to pollution. This socially hurts residents as well as the attitudes and word-of-mouth of the visitors.*

*Let's promote environmentally-friendly business.*

*We need to focus on not just how to bring a large dollar figure to Missoula, but on how we can get more dollars without ruining water and air. What is more important here?*

## **Perceptions of the Missoula Chamber of Commerce and the CVB**

### Focus Group One (CVB Member Group):

The perceived role of the CVB varied from making maps of Missoula to promoting business interests in the growth of Missoula. It is interesting to note the comment from a CVB member, "I don't really know what the CVB does or what they're up to now for that matter." It was common for an active member to think highly of the CVB, and for an inactive member to think poorly of or be indifferent to the CVB.

*There are a lot of dedicated people in the CVB who are trying to do a good job and I used to be very active, but I've taken the year off and now I know nothing of what they are doing. I wish they at least had a newsletter to keep me involved when I am lacking time.*

*When I have been involved I know that they are getting tournaments and sports and all of that, but I don't think the members even know what is happening.*

*The CVB really should be promoting Missoula as a whole. I've listened to what everybody else has been saying and I guess I'm in the same boat. I've been involved much in the past, in fact for some twenty years, and lately I have not been active. The whole thing is kind of like a soap opera, you can turn it off today and turn it back on two years from now. We did produce a video of Missoula years ago, I don't have any idea what happened to it. We did produce brochures of Missoula, I haven't seen one for ages. There were a lot of things we did in the CVB and I don't have any idea what's happened to them, not to say that they are not out there, it's just I have no idea where, and whoever it is, I don't even know who's responsible, but they are surely not getting around and communicating to the members. If we want anything, we have to come down here and get it, and then I'm not sure we're getting anything.*

Three suggestions for the improvement of the CVB were mentioned:

- More member input for special projects.
- Wise use of money.
- A newsletter to keep people well-informed.

The groups believed that implementing such suggestions would attract positive support for the CVB and enhance membership.

Focus Group Two (Chamber non-CVB Member Group):

The overwhelming feeling in this group was that Missoula is not what it used to be ten or fifteen years ago. Missoula is not as personal; exchanging "hellos" on the street is not as common anymore. This group does not believe that the CVB can do anything to mitigate such damage. Focus Group Two also perceived the CVB to be self-serving and a waste of time and money.

*The CVB benefits themselves, so you just pay your dues, folks, and wonder what's going on...we've dropped our membership...But, I'm not pinpointing anyone because many put in a lot of time and they deserve to benefit.*

*They are throwing thousands, literally thousands of dollars away...they pay airline tickets and everything to fly in these travel agents to snowmobile in March and April and they take them up to Lolo and Garnet and they stay up the Swan...this is the waste of money I am talking about.*

*The CVB is not designed to adequately encourage membership involvement in most every program and project that they do.*

As a result of the focus group discussions, negative attitudes of participants were transformed into hopes for enhanced involvement of businesses in planning Missoula's future. This group wants the CVB to produce real examples of bringing people together, of creating positive attitudes, and of taking leadership responsibility. They feel the CVB should be responsible for establishing a marketable image as well as initiating discussion about tax-bases and incentives for encouraging a diverse business environment.

Focus Group Three (Non-Affiliated Business Group):

Participants in this group were generally from small businesses in Missoula. These individuals

have traditionally advertised by word-of-mouth and the owners convey a strong sense of community service ethics. Many of these participants characterize themselves as "original locals" who are concerned about some aspects of Missoula's growth. Focus Group Three thinks that most city planning decisions are driven by a few powerful chain corporations (ShopKo, CostCo, etc.) that are ruining the original quality and style enjoyed and perpetuated by locally-owned businesses. This group wants to maintain a small town atmosphere and they are very concerned about a loss of a healthy lifestyle. This group has noted during discussion that resisting change will hurt their chances of regaining a style that is uniquely Missoula and they hope that the Chamber and CVB will attract more small businesses to which they can relate. Many really do want to become more involved. They feel that the Chamber and CVB should listen to the small business sector, as they have experienced Missoula's past.

*I used to be a member of the Chamber and they didn't seem to provide a direct service to me.*

*I used to be a Chamber member and I just didn't feel a close tie.*

*I think the CVB is supposed to be aware of local events, which they are not.*

*The CVB is a group who lacks communication with and respect for the small businesses of Missoula.*

Even though Focus Group Three does not belong to the Chamber (or the CVB), they voiced apprehensions similar to Groups One and Two about acceptability of markets, preferred visitors, and environmental and social considerations of attracting too many people to Missoula. They differed from the first two groups in their adamancy that Missoula must preserve the best of its past and focus on the needs of small businesses. Small businesses see threats to their livelihoods by large corporations with which they cannot compete.

Group Three's major point of contention is that the Chamber only serves its individual membership rather than the community as a whole. They feel that the Chamber and the CVB are catering to a few individual members who have money and political clout. Non-members submit that the role of the Chamber is to recognize equally that all businesses, small and large, members and non-members, are important contributors to Missoula.

*We need the CVB to quit focusing on the "obvious stores," often national chains, and support what is innately Missoula such as those smaller businesses who support Little League baseball.*

## CONCLUSION

The responses of the three groups provide valuable information with regards to the formulation of a successful winter marketing plan. Furthermore, the groups' comments illustrate perceptions of the CVB and its role in the community. Any winter marketing effort, on behalf of the CVB, should be supported by a diverse number of representatives from the Missoula business community. This effort must be well-organized and widely publicized.

Missoula is the largest city in western Montana. Many residents view Missoula as being the "right size" with a beautiful natural environment and social/cultural atmosphere. The most difficult aspect of Missoula in the wintertime is its unreliable weather. Snow for ski slopes and snowmobile trails can not be guaranteed. Access to the airports is unsure. Social considerations desired for a friendly business atmosphere requires visitors similar to the business residents. Therefore, Missoula businesses and the CVB may need to concentrate their wintertime marketing efforts regionally, attracting those who may be less bothered by the effects of winter and who need not fly to Missoula.

All three groups voiced a need for the CVB to communicate more with their own members as well as with Chamber members and non-Chamber members by incorporating a quarterly newsletter with information about CVB activities and community events.

Another concern was that CVB activities served a few, rather than all member businesses. One suggestion for the CVB was to identify Missoula's uniqueness so the business community and CVB can market an image which will meet the expectations of both visitors and residents. The CVB might also do more to alleviate event scheduling conflicts. Too often multiple events are scheduled on the same weekend, causing capacity problems, with nothing scheduled on adjacent weekends. Active use and expansion of the Missoula Cultural Exchange scheduling board may be a solution.

This study has not solved the problems of Missoula, but has established the need for all businesses, regardless of affiliation, to communicate with one another for the general betterment of the community. Focus Group participants are hopefully more aware of the potential role of the CVB and of the shared interests within Missoula's business community.

## Appendix I

### METHODOLOGY

Focus group members were selected using the *1993 Chamber Membership Directory* and the Missoula phone directory. Through a screening process, individuals were chosen to represent diverse business sizes, business types, gender, and geographic location. A preliminary list of business types was taken from the Chamber directory. From this list, each business was grouped into one of the ten following categories:

|              |                        |
|--------------|------------------------|
| Lodging      | Food Services          |
| Retail Sales | Transportation         |
| Gas Stations | Media                  |
| Real Estate  | Recreation             |
| Construction | Miscellaneous Services |

At least one representative from each category was invited to each focus group. However, availability decided the actual representation from each group.

Focus Group One included six females and one male for a total of seven out of sixteen invited participants: two Miscellaneous Services representatives, one Food Service, one Transportation, and three Lodging representatives. Focus Group Two had one female and three males for a total of four out of thirteen invited participants: two Real Estate representatives, one Transportation, and one Food Service representative. Focus Group Three included four females out of twelve participants that were invited: three Retail Sales and one Lodging Service representative. The Focus Groups were conducted at the Chamber of Commerce meeting room at 2:00 pm on separate dates. There were no cash incentives offered for focus group participation.

### LIMITATIONS

Participation in this study was limited to 4 to 7 people per focus group due to limited interest or time constraints. As a result, these findings may not represent the views of all Missoula businesses. Increasing the number of focus groups with higher incentives to participate would improve the representation of the targeted population.

## Appendix II

### LIST OF PARTICIPANTS

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## Appendix III

### IDENTIFIED WINTER MARKETS

This is a listing of all markets and market-related items brainstormed by the focus group participants for which to explore the economic and social desirability of potential wintertime market segments.

|                       |                             |
|-----------------------|-----------------------------|
| outdoor snowsports    | farm sales                  |
| downhill skiing       | hunting                     |
| cross-country skiing  | entertainment               |
| snow-boarding         | honeymoon                   |
| ice-fishing           | movie stars                 |
| snowmobiling          | shopping                    |
| indoor sporting       | gambling                    |
| indoor cross-training | partiers                    |
| hockey                | Canada                      |
| ice-rink              | Spokane                     |
| skating               | Idaho                       |
| tournaments           | Butte-Anaconda              |
| university events     | business trips              |
| high-school games     | cultural entertainment      |
| bar leagues           | Missoula Children's Theater |
| food                  | concerts                    |
| lunch stop            | pow-wows                    |
| elegant dining        | friends/relatives           |
| conventions           | medical services            |
| meetings              | resorts                     |
| hospice groups        | fairs                       |
| training seminars     | theaters                    |
| holidays              | real-estate                 |
| special events        | nearby markets              |
| auctions              | Glacier National Park       |
| antique sales         | Yellowstone National Park   |