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**TOURISM & RECREATION RESEARCH**  
UNIVERSITY OF MONTANA

## Using DMAs as a Marketing Tool: 2015 Nonresident Visitor Data

Designated Marketing Areas and the Nonresident Montana Traveler



A report analyzing the Designated Marketing Areas of nonresident travelers to the state of Montana - 2015 data.

# Using DMAs as a Marketing Tool: 2015 Nonresident Visitor Data

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### **Abstract**

The purpose of this analysis was to extract zip code data from the 2015 nonresident visitor survey and compare the Designated Marketing Areas (DMA) represented to the 2010 nonresident visitor DMA for similarities and differences. Results indicate more similarities than differences in vacationer residencies, but some markets rose further up in ranking such as Spokane and Portland while Salt Lake City dropped in its visitor ranking. At the local CVB level, more differences between the two years emerged for Big Sky, Billings, Butte, Great Falls, Kalispell, and Whitefish.

### **Executive summary**

Vacationers from the Seattle/Tacoma and Spokane Designated Marketing Areas are the top two markets for Montana. Followed by Minneapolis, Portland, and Denver, these top five DMA's, represent 27 percent of the vacationer market in Montana. Salt Lake City and Los Angeles dropped out of the top five in 2015. Overall, visitors to Montana from larger metropolitan areas (over 1 million in population) do not represent the ratio of vacationers to the state based on their DMA population while in contrast Montana receives a higher ratio of visitors from less populated DMA's than their population. Visitors to Montana are more likely to be from the western United States. The northeast and southeast portions of the country have an underrepresentation of vacationers to Montana. A summary of some significant changes in DMA representation includes:

- Big Sky CVB saw the most change in the top five DMA's. New York City, Duluth/Superior, MN, and Denver, CO emerged in the top five DMA's in 2015 dropping SLC, LA, and Minot/Bismarck from the 2010 list.
- Glacier Country travel region added Portland in their top five DMA's but lost Salt Lake City.
- In the Southwest MT travel region, Idaho Falls, ID dropped out of the top five DMA's.
- Missouri River Country added Denver in 2015, but lost Portland and Los Angeles in the top five DMA's.
- Salt Lake City dropped out the top five DMA's for Yellowstone Country, replaced by Portland.
- Central Montana travel region added Denver as a DMA but lost Salt Lake City and Idaho Falls in their top five DMA's.
- The Southeast MT travel region added Minot/Bismarck DMA but dropped LA from the top five.
- Great Falls CVB show Portland and Phoenix in the top five DMA's in 2015 losing SLC and Idaho Falls.
- Kalispell CVB added Spokane and LA in their top five DMA's dropping Denver and SLC.
- Whitefish added Seattle, Spokane, and Denver to their top five DMA's in 2015.

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## Introduction

This report provides an analysis of zip codes obtained from visitors to Montana during the annual nonresident 2015 study. Out-of-state visitors were intercepted at airports, rest areas, and gas stations throughout the state and asked a series of preliminary questions, including residence zip code. Within each questionnaire, zip codes were collected from nonresident visitors to use for analysis purposes. These zip codes are then segmented into Designated Marketing Areas (DMAs). The program used to generate the DMAs is unable to process fractions, and as a result, weighting the data would eliminate a significant percentage of the DMAs. In order to maintain the most accurate representation, the data in this report is not weighted. Additionally, the DMA program only processes U.S. zip codes; thus, Canadian and other foreign travelers are excluded from this analysis. Nonresident data from 2015 is compared to 2010 study results to track whether markets are shifting over time.

Designated Market Areas are based on geographic areas defined by the Nielsen Media Research Company. They consist of groups of counties, not bound by state borders, which make up a television market. Each of the 210 U.S. television markets is designated by the name of the city or cities that provide its local television coverage. Marketers use DMAs as a geographic tool to reach their target market; thus, understanding where visitors to Montana come from allows travel marketers to strategically plan their advertising and promotions. While other media formats exist and have evolved since 2010, DMAs are still useful for exploring what regions and markets are best to target for tourism promotion based on geography.

## Analysis and Market Interpretations

Findings based on DMAs are separated into six segments for this report. Results are presented first based on respondents' purpose of trip with the choices being vacation, visiting friends and relatives (VFR), business, and passing through. Next, the zip codes of vacationers were analyzed by repeat or first time vacationers to the state of Montana. Finally, the zip codes of travelers who spent at least one night in each travel region and each community with a convention and visitors bureau (CVB) were analyzed.

For each analysis, the top DMAs were ranked according to their order of highest proportion of visitors with rankings decreasing as the visitors/vacationers declined by proportion. A ranking of (1) represents the DMA with the highest represented market in the respective analysis while a ranking of (15) represented the market with the 15<sup>th</sup> out of 210 in proportion of visitors/vacationers from their respective DMA. Markets with equal rankings had the same proportion of visitors according to our data.

## Nonresident DMA by Purpose of Trip

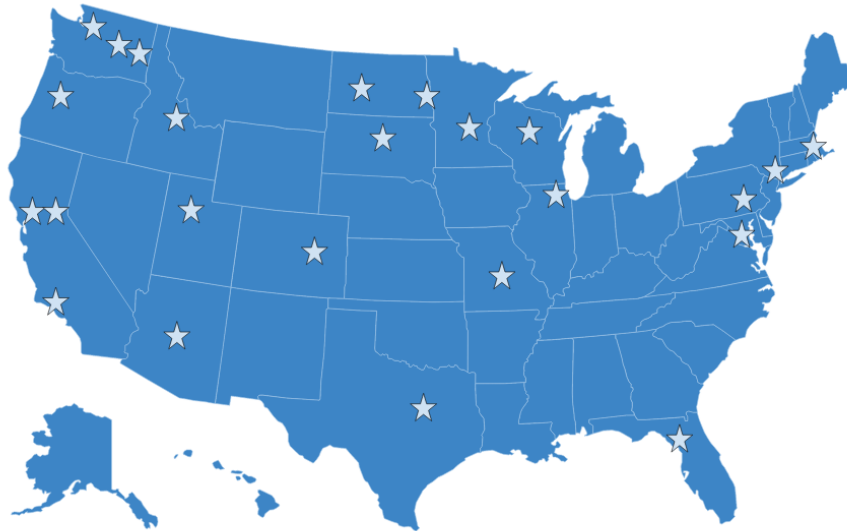
200 of the 210 DMAs from around the United States are represented in 2015's DMA analysis. Looking at the overall population, the top DMAs represented are 1) Seattle-Tacoma, WA, 2) Spokane, WA, 3) Minneapolis-St. Paul, MN, 4) Portland, OR, and 5) Denver, CO. These locations differ slightly from 2010's rankings with markets from states that are not surrounding Montana appearing. Even when separated into categories based on purpose of trip, these five DMAs continually are at or near the top of the list. From a marketing viewpoint, people within these five marketing areas are coming to Montana for every possible reason. It is sensible to assume that current marketing practices to these areas are successful and should be continued to keep the idea of Montana as a desirable destination in the minds of travelers. These locations are all within a day's drive or flight to Montana. Thus, it is evident that marketing to these areas is beneficial as they are accessible for residents to visit the state.

Figure 1 displays the DMA distribution for respondents who indicated they were in Montana primarily for vacationing. The top two DMAs consist of Seattle-Tacoma and Spokane, WA. Minneapolis-St. Paul, MN holds the third position followed by Portland, OR and Denver, CO to round out the top five. This closely resembles 2010's data; however, Portland, OR gained five spots from number nine in 2010. Looking at the overall breakdown of DMAs, nonresident vacationers come from a large array of states and locations stretching from Washington State to Florida. Five new DMAs appear in 2015 data compared to 2010: Boston, MA (Rank 17), Houston, TX (Rank 19), Tampa – St. Petersburg, FL (Rank 22), Milwaukee, WI (Rank 24), and St. Louis, MO (Rank 25). Many DMAs shifted a relatively small amount (+-1 rank) within the five year stretch, but a few moved more significantly. For instance, Portland, OR gained five spots, Salt Lake City, UT dropped five ranks, Idaho Falls- Pocatello, ID dropped nine ranks, and Dallas – Ft. Worth, TX dropped six ranks. However, it still appears that visitors tend to come from similar places with a few exceptions.

A quick summary comparing DMA vacationer rankings in the past 5 years shows that seven areas stayed in their same rank (Seattle - Tacoma, WA; Minneapolis - St. Paul, MN; Chicago, IL; New York, NY; Fargo - Valley City, ND; and Washington, D.C.; Yakima - Pasco +, WA), 12 areas moved up in their rankings (Spokane, WA; Portland, OR; Denver, CO; Minot - Bismarck - +, ND; San Francisco - Oakland +, CA; Sacramento - Stockton +, CA; Rapid City, SD; Boston, MA; Houston, TX; Tampa - St. Petersburg, FL; Milwaukee, WI; St. Louis, MO), and the remaining area went down in their overall ranking (Los Angeles, CA; Salt Lake City, UT; Phoenix, AZ; Idaho Falls - Pocatello, ID; Dallas - Ft. Worth, TX; and Philadelphia, PA).

Figure 1: Primary Purpose - Vacationer DMAs

Primary Vacationer DMAs - 2015



2015 DMA Rank	2010 DMA Rank	Designated Marketing Area	Frequency	Percentage
1	1	Seattle - Tacoma, WA	297	7.5%
2	4	Spokane, WA	272	6.9%
3	3	Minneapolis - St. Paul, MN	219	5.5%
4	9	Portland, OR	148	3.7%
5	6	Denver, CO	139	3.5%
6	5	Los Angeles, CA	116	2.9%
7	2	Salt Lake City, UT	107	2.7%
8	9	Minot - Bismarck - +, ND	103	2.6%
9	10	San Francisco - Oakland +, CA	88	2.2%
10	8	Phoenix, AZ	82	2.1%
11	11	Chicago, IL	78	2.0%
12	12	New York, NY	71	1.8%
13	13	Fargo - Valley City, ND	65	1.6%
14	15	Sacramento - Stockton +, CA	65	1.6%
15	17	Rapid City, SD	63	1.6%
16	7	Idaho Falls - Pocatello, ID	57	1.4%
17	-	Boston, MA	55	1.4%
18	18	Washington, D.C.	53	1.3%
19	-	Houston, TX	52	1.3%
20	14	Dallas - Ft. Worth, TX	41	1.0%
21	19	Philadelphia, PA	39	1.0%
22	-	Tampa - St. Petersburg, FL	36	0.9%
23	23	Yakima - Pasco +, WA	34	0.9%
24	-	Milwaukee, WI	33	0.8%
25	-	St. Louis, MO	32	0.8%



Table 1 shows the DMA ranking in Montana as compared to their overall population of DMA's over one million in population. The shaded areas highlight those DMA areas where Montana gets a higher proportion of their population.

**Table 1: DMA representation of markets over 1 million**

DMA Rank by Size	Designated Market Area	TV Homes	% of US	MT Vacationers	% of Vacationers	Difference between % of US and % MT Vacationers
1	New York, NY	7,368,320	6.503	71	1.798	-4.705
2	Los Angeles, CA	5,489,810	4.845	116	2.938	-1.907
3	Chicago, IL	3,475,220	3.067	78	1.976	-1.091
4	Philadelphia, PA	2,917,920	2.575	39	0.9878	-1.5872
5	Dallas - Ft. Worth, TX	2,646,370	2.335	41	1.04	-1.295
6	San Francisco-Oak, CA	2,484,690	2.193	88	2.23	0.037
7	Washington, DC	2,443,640	2.156	53	1.34	-0.816
8	Boston, MA	2,411,250	2.128	55	1.39	-0.738
9	Atlanta, GA	2,385,730	2.105	31	0.79	-1.315
10	Houston, TX	2,373,700	2.095	52	1.32	-0.775
11	Tampa-St. Pete, FL	1,859,820	1.641	36	0.91	-0.731
12	Phoenix, AZ	1,848,850	1.632	82	2.08	0.448
13	Detroit, MI	1,828,230	1.613	28	0.71	-0.903
14	Seattle-Tacoma, WA	1,766,070	1.559	297	7.52	5.961
15	Mpls-St. Paul, MN	1,723,210	1.521	219	5.55	4.029
16	Miami-Ft. Lauderdale, FL	1,660,020	1.465	11	0.28	-1.185
17	Denver, CO	1,576,090	1.391	139	3.52	2.129
18	Cleveland-Akron, OH	1,493,160	1.318	24	0.61	-0.708
19	Orlando-Daytona Beach, FL	1,489,710	1.315	28	0.71	-0.605
20	Sacramento-Stockton, CA	1,349,990	1.191	65	1.665	0.474
21	St. Louis, MO	1,217,370	1.074	32	0.81	-0.264
22	Charlotte, NC	1,168,610	1.031	23	0.58	-0.451
23	Pittsburgh, PA	1,154,550	1.019	18	0.46	-0.559
24	Portland, OR	1,136,320	1.003	148	3.75	2.747
25	Raleigh-Durham, NC	1,131,460	0.999	16	0.41	-0.589
26	Baltimore, MD	1,099,890	0.971	14	0.40	-0.571

**Notes:**

DMA® is a registered trademark of Nielsen Media Research, Inc.

Source: <http://www.nielsenmedia.com>. Accessed June 7<sup>th</sup>, 2016.

Green highlights equate to positive market representation whereas white highlights are negative representation.

Table 2 shows the DMA ranking in Montana as compared to their overall population of DMA's less than one million in population. The shaded areas highlight those DMA areas where Montana gets a higher proportion of their population.

**Table 2: DMA representation of markets under 1 million**

DMA Rank by Size	DMA	TV Homes	% of US	MT Vacationers	% of Vacationers	Difference between % of US and % Vacationers
30	Hartford - New Haven, CT	945,250	0.834	24	0.6	-0.234
31	Columbus, OH	907,530	0.801	23	0.58	-0.221
33	Kansas City, KS	899,020	0.793	26	0.6	-0.193
34	Salt Lake City, UT	884,900	0.781	107	2.7	1.919
35	Milwaukee, WI	882,210	0.779	24	0.8	0.021
36	Cincinnati, OH	868,900	0.767	22	0.55	-0.217
39	Austin, TX	745,640	0.658	28	0.7	0.042
40	Las Vegas, NV	736,700	0.65	21	0.53	-0.12
41	Grand Rapids, MI	717,990	0.634	27	0.7	0.066
48	Albuquerque - Santa Fe, NM	662,570	0.585	24	0.6	0.015
68	Green Bay-Appleton, WI	433,860	0.383	28	0.7	0.317
73	Spokane, WA	414,520	0.366	272	6.9	6.534
74	Omaha, NE	409,160	0.361	22	0.55	0.189
81	Madison, WI	374,980	0.331	24	0.6	0.269
89	Colorado Springs - Pueblo, CO	346,120	0.305	22	0.55	0.245
107	Boise, ID	265,580	0.234	30	0.8	0.566
110	Sioux Falls(Mitchell), IA	260,500	0.23	29	0.7	0.47
115	Fargo-Valley City, ND	247,400	0.218	65	1.6	1.382
119	Eugene, OR	232,860	0.205	20	0.5	0.295
123	Yakima-Pasco, WA	228,510	0.202	34	0.9	0.698
139	Minot-Bismarck, ND	164,550	0.145	103	2.6	2.455
141	Duluth-Superior, MN	163,560	0.144	27	0.7	0.556
163	Idaho Falls-Pocatello, ID	121,940	0.108	57	1.4	1.292
171	Rapid City, SD	98,400	0.087	63	1.6	1.513

**Notes:**

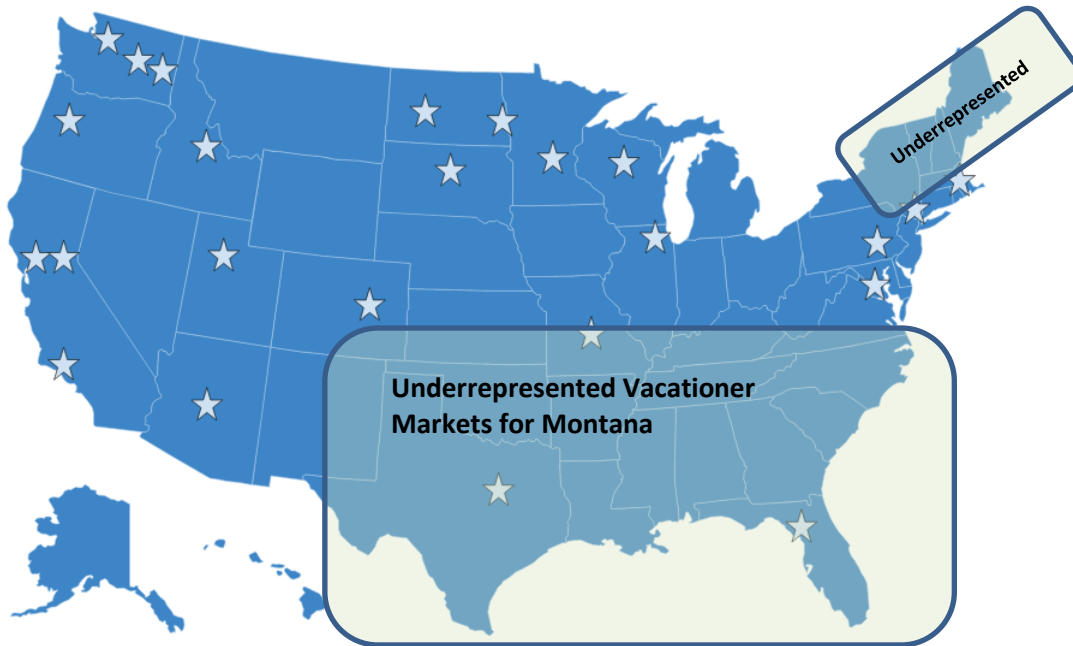
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Source: <http://www.nielsenmedia.com>. Accessed June 7<sup>th</sup>, 2016.

Green highlights equate to positive market representation whereas white highlights are negative representation.

Figure 2: Primary Purpose - Vacationers and Underrepresented markets

## Primary Vacationer DMAs - 2015



### Vacation Market Considerations

The above figure displays the potential underrepresented vacationer markets for Montana. Overall, there appears to be a lack of vacationers coming to Montana from the southeastern portion of the United States and potentially the northeastern portion as well. Areas such as Atlanta, GA, Nashville, TN, and North and South Carolina are not represented within the top DMAs visiting Montana. Furthermore, DMAs such as New York, NY are represented but are not proportionate with their share of the US market. This area could potentially be expanded to include most of the Northeastern coast of the US as the share of visitation is less than their share of the US market.

The top five largest DMAs across the country are all underrepresented in terms of their percentage of Montana vacationers to television market size. New York (-4.70%), Los Angeles (-1.90%), Chicago (-1.09%), Philadelphia (-1.59%), and Dallas-Ft. Worth (-1.29%) all have a higher share of the US market when compared to their share of MT vacationers. In fact, only one of the top 10 DMAs in size has a positive representation; San Francisco-Oakland, CA (+.037%). Even then, this DMA is nearly equal in its proportion. For Montana, attracting larger markets can be a primary goal to strive towards as they currently excel in promoting to mid-size to small

markets. However, this may not be an easy task. Montana should look into those geographic market areas to see if the geotraveler exists there in large enough numbers to justify the time and money one would have to spend to increase the market share before.

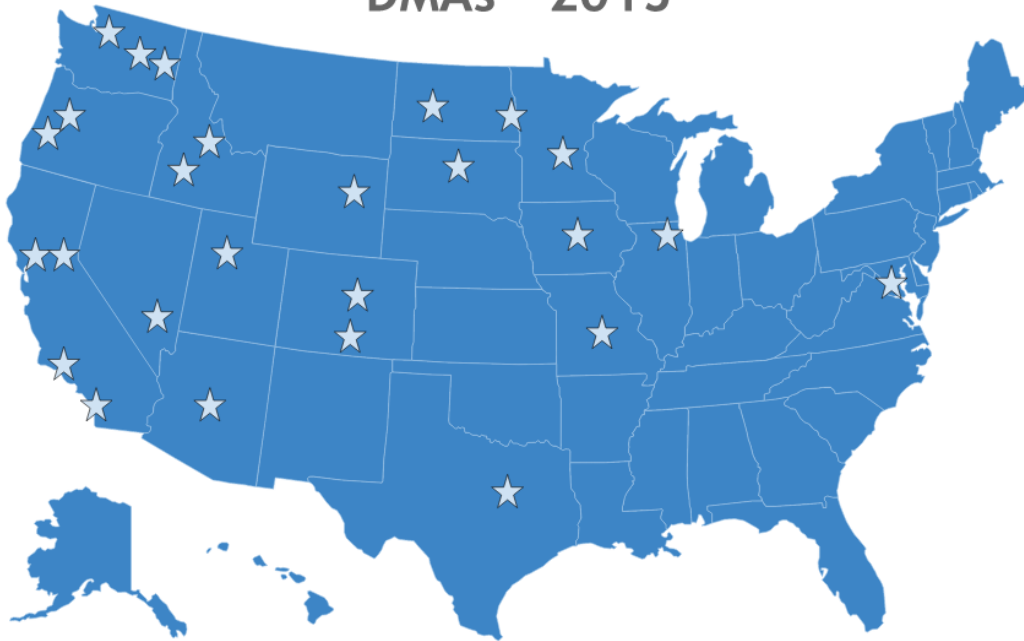
External factors may contribute to smaller representation from larger markets, especially in the eastern portion of the U.S. Direct flights to Montana, while continually increasing, are still few and far between. Places such as Salt Lake City, Denver, Seattle, and Minneapolis have continually provided direct flights to many Montana cities and are within a reasonable driving distance to the state. Extended weekend trips are not improbable as most Montana communities have direct flights every day from one or more of these cities. Flights from New York and Dallas have been recently added to Bozeman which may lead to a more accurate representation of vacationers from these areas.

A secondary approach to take is to market the unique attributes Montana possesses that other destinations do not have. For example, the major underrepresented markets are all large metropolitan cities with millions of households. Montana's sparse population density provides people with a location which has solitude and a chance to escape the type of environment that those residents are used to. In addition, Montana's landscape features such as mountains, rivers, and forests are not available to many individuals in these major markets. Chicago, New York, and Los Angeles are prime locations to market Montana's attributes as they lack in the amenities Montana possesses. Although, there is inherent risk in attempting to improve market representation if Montana attracts people without geotraveler tendencies as this could lead to expectations not being met.

Looking back at Table 2, highlighted DMAs represent a select number of locations that have fewer than one million TV homes with many having exceptional visitor proportions. These specific results tell a different story when compared to the larger metropolitan cities. Montana attracts a disproportionate number of nonresident visitors when compared to their US market share within these smaller DMAs. Places such as Spokane, WA and Fargo-Valley City, ND are two examples of high visitation from those markets. It appears that marketing and promotion within these markets is very effective.

Figure 3: Primary Purpose - Visiting Friends and Relatives DMAs

### Primary Visiting Friends and Relatives DMAs - 2015



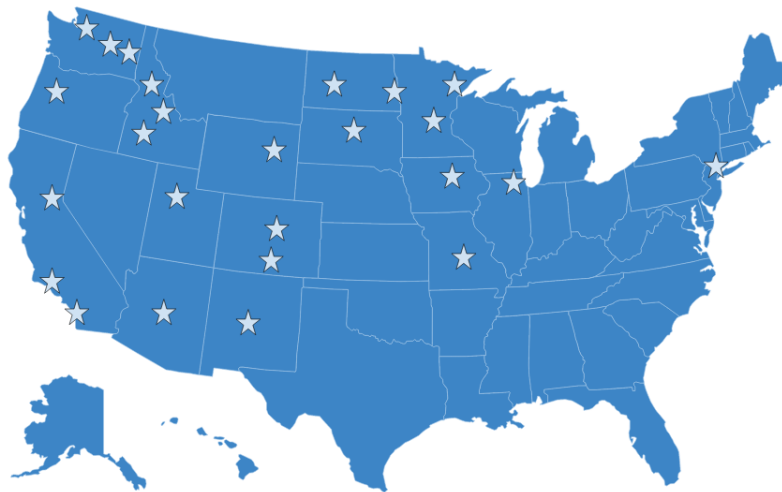
2016 DMA Rank	2010 DMA Rank	Designated Marketing Area	Frequency	Percentage
1	1	Spokane, WA	308	11.4%
2	3	Seattle - Tacoma, WA	280	10.4%
3	8	Portland, OR	149	5.5%
4	4	Denver, CO	147	5.4%
5	-	Minot - Bismarck - +, ND	98	3.6%
6	2	Salt Lake City, UT	98	3.6%
7	7	Minneapolis - St. Paul, MN	90	3.3%
8	8	Phoenix, AZ	90	3.3%
9	11	Rapid City, SD	78	2.9%
10	5	Idaho Falls - Pocatello, ID	67	2.5%
11	6	Los Angeles, CA	67	2.5%
12	10	Boise, ID	55	2.0%
13	13	Sacramento - Stockton +, CA	49	1.8%
14	-	Yakima - Pasco +, WA	47	1.7%
15	-	Casper - Riverton, WY	37	1.4%

Figure 3 displays the DMA distributions for nonresident visitors who were in the state primarily to visit friends and relatives. Spokane, WA again claims the top rank similar to results from the 2010 study. Seattle – Tacoma, WA comes in at number two followed by Portland, OR

which gained five spots since 2010. Denver, CO stays in the fourth spot once again with Minot – Bismarck, ND completing the top five. Minot – Bismarck is an interesting DMA as it did not appear in the 2010 rankings, but takes the fifth spot in 2015. Compared to vacationers, visitors who are visiting friends and relatives in Montana tend to come from nearby states. In fact, there are no Eastern US states represented in the top 15 DMAs. Three DMAs made their appearance in the top 15 for this listing compared to 2010: Minot – Bismarck, ND, Yakima – Pasco, WA, and Casper – Riverton, WY.

**Figure 4: Primary Purpose - Passing Through DMAs**

**Primary Passing Through DMAs - 2015**



2015 DMA Rank	2010 DMA Rank	Designated Marketing Area	Frequency	Percentage
1	1	Spokane, WA	514	15.6%
2	2	Seattle - Tacoma, WA	348	10.5%
3	10	Minot - Bismarck - +, ND	197	6.0%
4	5	Idaho Falls - Pocatello, ID	192	5.8%
5	3	Salt Lake City, UT	177	5.4%
6	7	Minneapolis - St. Paul, MN	130	3.9%
7	9	Denver, CO	126	3.8%
8	8	Portland, OR	115	3.5%
9	6	Rapid City, SD	83	2.5%
10	-	Boise, ID	57	1.7%
11	12	Phoenix, AZ	57	1.7%
12	12	Fargo - Valley City, ND	54	1.6%
13	12	Los Angeles, CA	50	1.5%
14	-	Sioux Falls - Mitchell, IA	47	1.4%
15	13	Yakima - Pasco +, WA	45	1.4%

Figure 4 displays the proportions of DMAs for visitors who are primarily passing through the state during 2015. These visitors may be more difficult to market towards because their main purpose is not to visit Montana. However, perhaps they may be influenced to spend time in the state. Again, Spokane and Seattle-Tacoma, WA are seen at the top of the list with Minot – Bismarck, ND falling in at number three. Idaho Falls – Pocatello, ID and Salt Lake City, UT complete the top five. More visitors tend to come from Western US states, but there is still a wide array of states that are represented. Only Boise, ID and Sioux Falls – Mitchell, IA were not in 2010’s top 15 for passing through. Minot – Bismarck, ND saw a sharp rise in numbers to number four in 2015 compared to number 10 in 2010. This may be attributed to the Bakken Oil development and commuters traveling to and from these sites.

**Figure 5: Primary Purpose - Business Traveler DMAs**

### Primary Business DMAs - 2015



2015 DMA Rank	2010 DMA Rank	Designated Marketing Area	Frequency	Percentage
1	2	Spokane, WA	194	12.9%
2	1	Denver, CO	121	8.1%
3	3	Seattle - Tacoma, WA	85	5.7%
4	1	Salt Lake City, UT	81	5.4%
5	-	Minot - Bismarck - +, ND	75	5.0%
6	6	Portland, OR	66	4.4%
7	4	Idaho Falls - Pocatello, ID	58	3.9%
8	9	Rapid City, SD	52	3.5%
9	7	Boise, ID	45	3.0%
10	8	Minneapolis - St. Paul, MN	33	2.2%
11	7	Phoenix, AZ	31	2.1%
12	-	Casper - Riverton, WY	26	1.7%
13	-	Dallas - Ft. Worth, TX	25	1.7%
14	5	Los Angeles, CA	24	1.6%
15	-	Chicago, IL	22	1.5%

Figure 5 displays the proportions of DMAs represented by visitors coming to Montana for business purposes. Spokane, WA, Denver, CO, and Seattle – Tacoma, WA represent the top three in DMAs in this category. Again, Salt Lake City, UT and Minot – Bismarck, ND round out the top five DMAs. The only DMAs that are outside of a small radius surrounding Montana are Dallas – Ft. Worth, TX, Los Angeles, CA, Phoenix, AZ, and Chicago, IL. Most visitors coming for business purposes are geographically close to Montana. Four DMAs did not appear in 2010's rankings for business, but are ranked in 2015: Minot-Bismarck, ND, Casper-Riverton, WY, Dallas-Ft. Worth, WY, and Chicago, IL. Again, this is likely related to the Bakken Oil development.

## Primary Purpose DMA Summary

As displayed, many commonalities exist when examining DMA distribution of visitors by purpose of trip. Vacationers, as expected, tend to come from a wider range of regions compared to other purposes. Large population DMAs are higher in volume within vacationers when compared to other travel purposes. This is promising as it at least finds that marketing to metropolitan cities is worthwhile. However, there are a disproportionate number of total visitors from large-scale DMAs when comparing them to their share of the US market.

When examining DMAs by other purposes, a clearer picture of where the majority of visitors are coming from emerges. The Western US states (Washington, California, Colorado, Oregon, Idaho, Arizona) comprise the majority of DMAs where visitors frequent for purposes such as visiting friends and relatives and passing through. Business travelers generally come from Western US states, yet cities such as Dallas, Los Angeles, and Chicago appear on the list.

Overall recommendations based on purpose of trip focus on the successful markets while attempting to engage the emerging sectors of the US. Places such as Seattle-Tacoma, Spokane, and Minneapolis are very popular areas for Montana visitors to reside. The marketing and promotion in these areas appears to be working as they have further solidified themselves as primary markets. Other destinations such as Chicago, New York, Boston, and Dallas-Ft. Worth are represented, but could use more targeting to encourage travel to Montana. Some emerging markets that are not well represented based on their US market share that could be targeted are Boston, St. Louis, and much of the Southeastern US (e.g. Atlanta, Nashville, and Miami/Tampa). These areas have some visitors traveling to Montana, but are underrepresented in terms of total visitation statistics and proportion of population from those DMA's. It appears that travel distance and access (direct flights) is likely the reason these DMA's are not as high in proportion to their population making it difficult to get a high return on investment on promotion that might be conducted in these areas.

## Repeat and First-time Visitor DMA Comparison

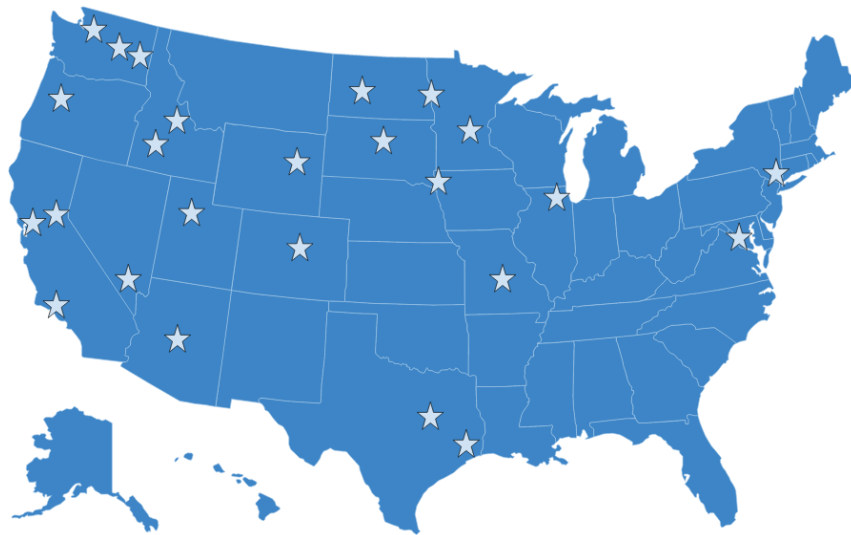
Besides classification by purpose of trip, additional factors are compared by their DMA representation. Repeat and first-time visitor breakdown is an important clarification to consider when examining DMAs because of the marketing implications. Repeat visitors hopefully will be



able to recall their Montana experience and promotional materials will pique their interest to revisit the state. However, first-time visitors are more difficult to capture as they do not have a level of familiarity and attachment. Identifying regions in which potential visitors can be targeted is equally as important as bringing back those who already have a vested interest and familiarity with the state. The first figure and table represents repeat visitor DMAs for 2015 compared to 2010.

**Figure 6: Repeat Visitor DMAs**

### Repeat Visitor DMAs - 2015

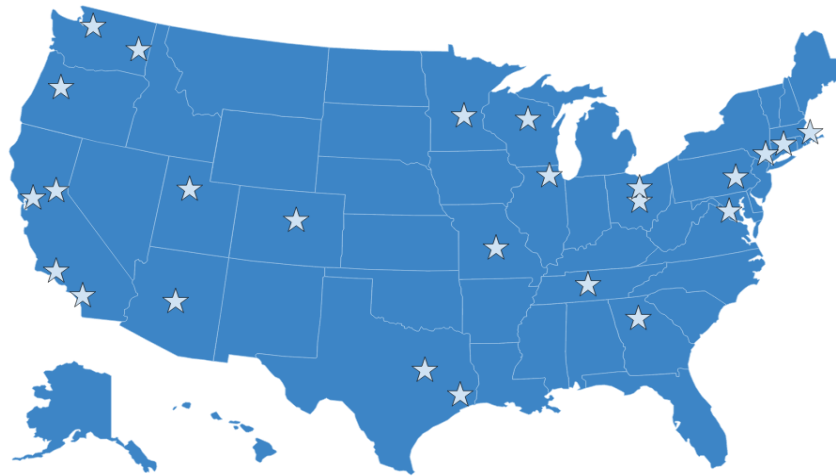


2015 DMA Rank	2010 DMA Rank	Designated Marketing Area	Frequency	Percentage
1	4	Spokane, WA	1342	12.9%
2	1	Seattle - Tacoma, WA	992	9.5%
3	5	Denver, CO	532	5.1%
4	8	Minot - Bismarck - +, ND	518	5.0%
5	2	Salt Lake City, UT	452	4.3%
6	9	Portland, OR	447	4.3%
7	3	Minneapolis - St. Paul, MN	429	4.1%
8	7	Idaho Falls - Pocatello, ID	402	3.9%
9	14	Rapid City, SD	294	2.8%
10	10	Phoenix, AZ	228	2.2%
11	6	Los Angeles, CA	216	2.1%
12	18	Boise, ID	202	1.9%
13	13	Fargo - Valley City, ND	160	1.5%
14	15	Sacramento - Stockton +, CA	149	1.4%
15	-	Yakima - Pasco +, WA	149	1.4%

Repeat visitor DMAs see little changes from 2010’s representations. Spokane, WA takes the top spot with almost 13 percent of the sample. Seattle-Tacoma, WA and Denver, CO trail behind with 9.5 percent and 5.1 percent respectively (Figure 6). Two commonly seen DMAs follow closely behind with Minot-Bismarck, ND (5.0%) and Salt Lake City, UT (4.3%). The top fourteen DMAs in repeat visitation were all present in the 2010 rankings, with little rank fluctuation overall. Los Angeles, CA, Salt Lake City, UT, and Seattle-Tacoma, WA saw slight decreases in rank from 2010 to 2015, but still appear on the list.

**Figure 7: First time Visitor DMAs**

**First-time Visitor DMAs - 2015**



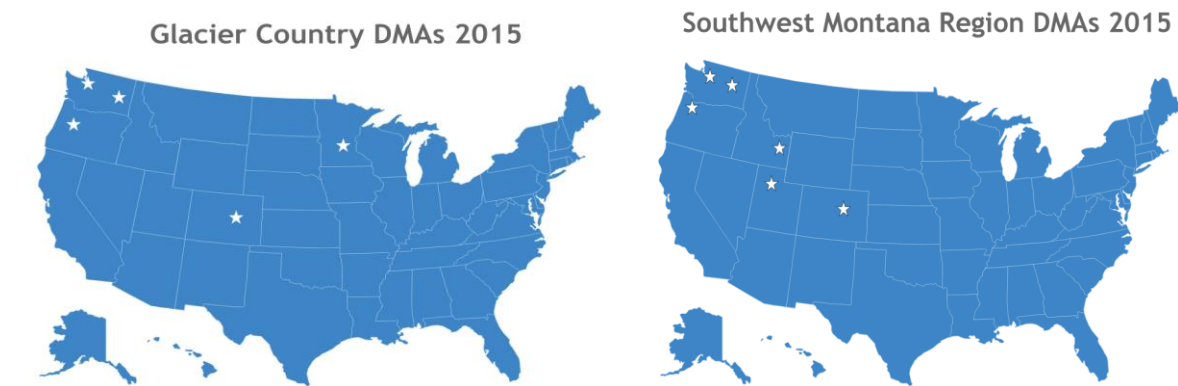
2015 DMA Rank	2010 DMA Rank	Designated Marketing Area	Frequency	Percentage
1	1	Seattle - Tacoma, WA	78	4.5%
2	3	Minneapolis - St. Paul, MN	63	3.6%
3	2	Los Angeles, CA	60	3.4%
4	8	Denver, CO	57	3.3%
5	11	Portland, OR	55	3.2%
6	9	New York, NY	47	2.7%
7	12	Chicago, IL	46	2.6%
8	4	Spokane, WA	46	2.6%
9	5	Salt Lake City, UT	43	2.5%
10	10	San Francisco - Oakland +, CA	42	2.4%
11	--	Boston, MA	39	2.2%
12	6	Phoenix, AZ	39	2.2%
13	--	Sacramento - Stockton +, CA	31	1.8%
14	15	Dallas - Ft. Worth, TX	29	1.7%
15	--	Washington, D.C.	28	1.6%

As with repeat visitor DMA distribution, first-time visitors exhibit similar trends from 2010 rankings (Figure 7). Seattle-Tacoma, WA takes the top spot with 4.5 percent of respondents residing in the region. Moving up one position is Minneapolis-St. Paul, MN while Los Angeles, CA drops by the same result. Denver, CO takes a more prominent role in 2015 ranks by gaining four ranks to fourth place from eighth in 2010. Overall, twelve of the top fifteen DMAs are in both the 2015 and 2010 rankings. The new additions to the 2015 rankings are Boston, MA, Sacramento-Stockton, CA, and Washington, DC. The top movers within this figure are Portland, OR (+6 ranks), Chicago, IL (+5 ranks), Phoenix, AZ (-6 ranks), Spokane, WA (-4 ranks), and Salt Lake, City (-4 ranks).

**Montana’s Travel Regions – DMA Rankings of those who spent a night**

In this comparison, Montana’s six travel regions (Glacier Country, Gold West Country, Central Montana Region, Yellowstone Country, Missouri River Country, and Southeast Montana Region) are displayed with their top five DMAs for 2015 of nonresident visitors who spent at least one night in the region. Based on these results each travel region may have a different area to focus promotion.

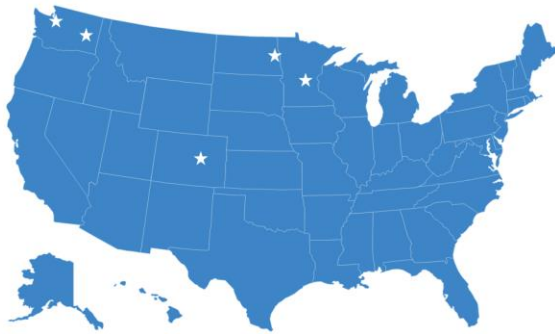
**Figure 8: DMA Rankings by Montana Travel Region**



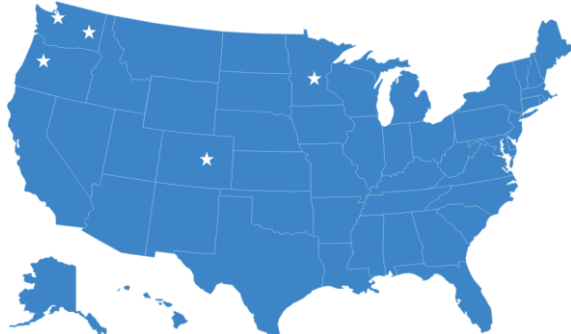
Glacier Country	DMA Ranking		Southwest MT Region	DMA Ranking	
	2015	2010		2015	2010
Seattle - Tacoma, WA	1	1	Spokane, WA	1	1
Spokane, WA	2	3	Seattle - Tacoma, WA	2	3
Portland, OR	3	-	Salt Lake City, UT	3	2
Minneapolis - St. Paul, MN	4	4	Denver, CO	4	1
Denver, CO	5	5	Portland, OR	5	5
Salt Lake City, UT	-	2	Idaho Falls, ID	-	4

Figure 8 Continued

Missouri River Country DMAs 2015

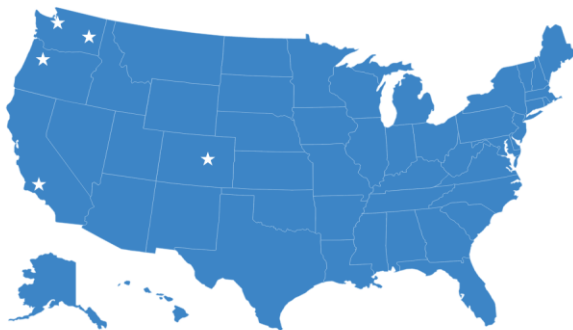


Yellowstone Country DMAs 2015



Missouri River Country	DMA Ranking		Yellowstone Country	DMA Ranking	
	2015	2010		2015	2010
Minneapolis - St. Paul, MN	1	1	Seattle - Tacoma, WA	1	2
Spokane, WA	2	3	Spokane, WA	2	4
Seattle - Tacoma, WA	3	2	Minneapolis - St. Paul, MN	3	1
Denver, CO	4	-	Denver, CO	4	5
Fargo - Valley City, ND	5	-	Portland, OR	5	-
Portland, OR	-	4	Salt Lake City UT	-	3
Los Angeles, CA	-	5			

Central Montana Region DMAs 2015



Southeast Montana Region DMAs 2015



Central Montana Region	DMA Ranking		Southeast Montana Region	DMA Ranking	
	2015	2010		2015	2010
Spokane, WA	1	1	Seattle - Tacoma, WA	1	1
Seattle - Tacoma, WA	2	3	Spokane, WA	2	4
Portland, OR	3	5	Minneapolis - St. Paul, MN	3	2
Denver, CO	4	-	Denver, CO	4	3
Los Angeles, CA	5	-	Minot - Bismarck, ND	5	-
Salt Lake City, UT	-	2	Los Angeles, CA	-	5
Idaho Falls, ID	-	4			

Glacier Country and Southwest MT Region are the first two travel regions presented above in Figure 8. Glacier Country's top two DMAs (Seattle-Tacoma, WA, and Spokane, WA) possess a large majority of respondents compared to the bottom three DMAs. Portland, OR represents the third largest DMA, followed by Minneapolis-St. Paul, MT and Denver, CO. Southwest MT Region had similar results, but saw a lower amount of overall respondents spending a night. Spokane, WA and Seattle-Tacoma, WA again are at the top of the list with Salt Lake City, UT, Denver, CO, and Portland, OR rounding out the top five. For these two regions, Glacier Country appears to have a market east of Montana that has potential to become more relevant in the future in Minneapolis-St. Paul. On the other hand, Gold West Country appears to be the most successful staying in western states near the Rockies.

Missouri River Country and Yellowstone Country's DMAs are displayed next. Missouri River Country had the lowest total number of respondents who spent a night and figures for DMAs should be taken with caution. Minneapolis-St. Paul, MN had the highest ranking, closely followed by Spokane, WA. Seattle-Tacoma, WA saw third highest amount of nonresident visitors staying the night and holds the third spot on this list. The fourth and fifth positions are held by Denver, CO and Fargo-Valley City, ND, but with only four respondents each it is difficult to make any clear decisions. Yellowstone Country contained the same DMAs as Glacier Country, but in a slightly different order. Again, Seattle-Tacoma, WA and Spokane, WA are well represented with Minneapolis-St. Paul, MN, Denver, CO, and Portland, OR in order to complete the rankings. Similar to Glacier Country, Yellowstone Country has the ability to target markets both on the west of the Rockies and to the east. Missouri River Country's lower figures represent an opportunity to attract visitors to spend more nights in their communities.

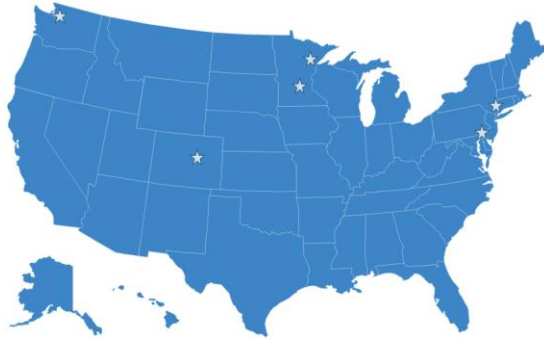
The final two travel regions presented in Figure 8 are Central Montana and Southeast Montana. Central Montana saw a similar trend to many other regions with Spokane, WA, Seattle-Tacoma, WA, Portland, OR, and Denver, CO. The new DMA within Central Montana is Los Angeles, CA which rounds out the top five DMAs. Los Angeles, CA did not appear in the top five DMAs of any other travel region. Finally, Southeast Montana Region again had a very similar trend with one difference of Minot-Bismarck, ND being included in the top five DMAs. This result could be caused by workers in the Bakken Oil Fields visiting Montana while they are on vacation. Either way, it is the only instance appearing in the top five DMAs for an individual travel region.

## **DMA Rankings for CVB Cities**

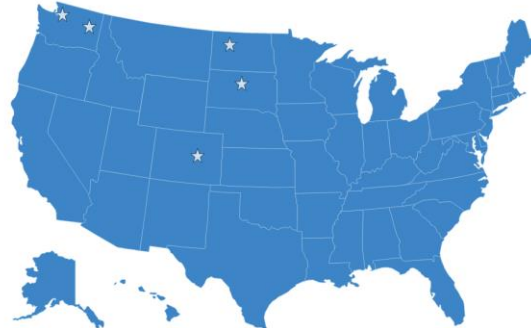
This final section compares the top five DMA rankings of CVB cities during 2015. Only maps and rankings of each CVB are shown as the list for CVB cities is lengthy. Comparison with 2010 DMAs is presented where possible. Overall, CVB's appear to have a wide variation in the residencies of their visitors.

Figure 9: DMA Rankings within CVB Communities

Big Sky DMA Rankings 2015

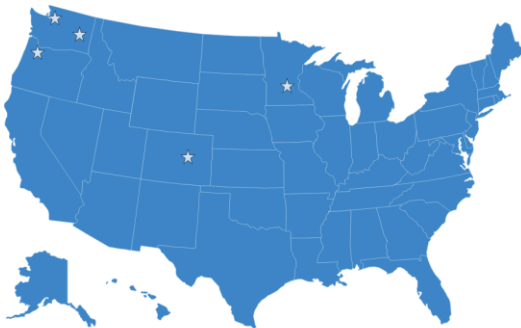


Billings DMA Rankings 2015

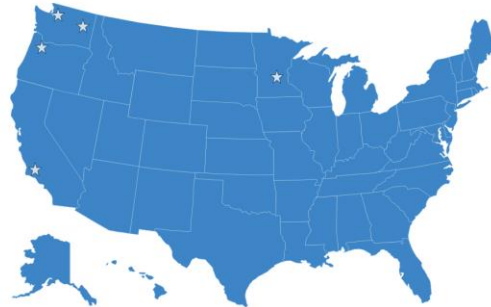


Big Sky - DMA	2015	2010	Billings - DMA	2015	2010
Minneapolis - St. Paul, MN	1	1	Seattle - Tacoma, WA	1	1
New York, NY	2	-	Spokane, WA	2	3
Duluth - Superior, MN	3	-	Denver, CO	3	2
Denver, CO	4	-	Minot - Bismarck, ND	4	-
Seattle - Tacoma, WA	5	2	Rapid City, SD	5	6
Salt Lake City, UT	-	3	Mpls.-St. Paul, MN	-	4
Los Angeles, CA	-	4	Los Angeles, CA	-	5
Minot-Bismarck, ND	-	5			

Bozeman DMA Rankings 2015

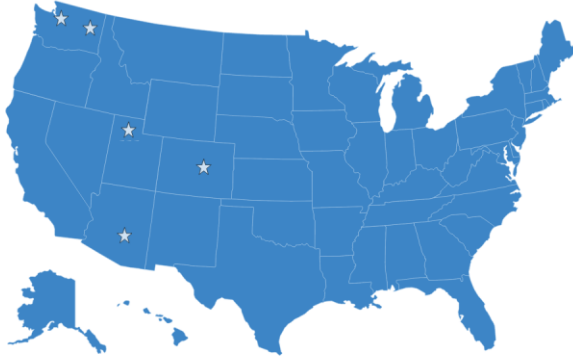


Butte DMA Rankings 2015

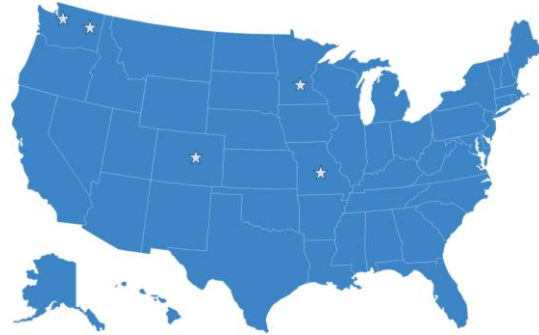


Bozeman - DMA	2015	2010	Butte - DMA	2015	2010
Spokane, WA	1	2	Seattle - Tacoma, WA	1	1
Seattle - Tacoma, WA	2	2	Spokane, WA	2	1
Denver, CO	3	-	Minneapolis - St. Paul, MN	3	-
Minneapolis - St. Paul, MN	4	1	Portland, OR	4	4
Portland, OR	5	4	Los Angeles, CA	5	-
Salt Lake City, UT	-	4	Salt Lake City, UT	-	2
			Boise, ID	-	3

### Dillon DMA Rankings 2015



### Gardiner DMA Rankings 2015

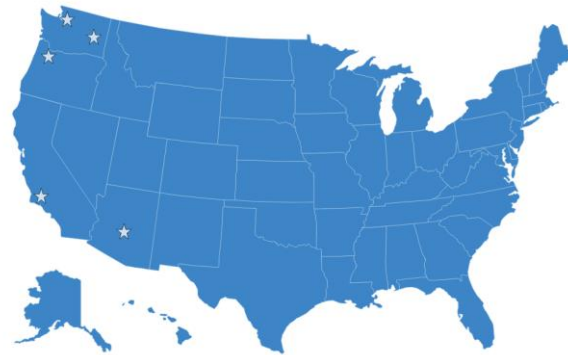


Dillon - DMA	2015	2010	Gardiner - DMA	2015	2010
Spokane, WA	1	-	Seattle - Tacoma, WA	1	-
Salt Lake City, UT	2	-	Minneapolis - St. Paul, MN	2	-
Phoenix, AZ	3	-	Spokane, WA	3	-
Denver, CO	4	-	St. Louis, MO	4	-
Seattle - Tacoma, WA	4	-	Denver, CO	5	-

### Glendive DMA Rankings 2015

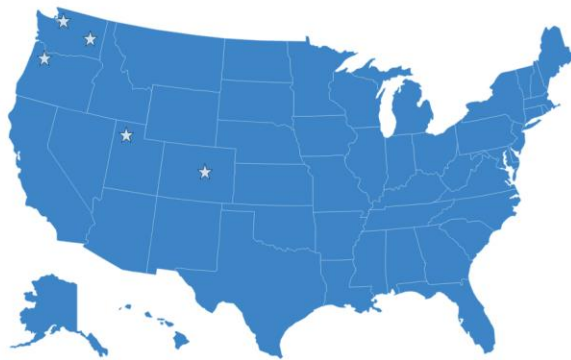


### Great Falls DMA Rankings 2015

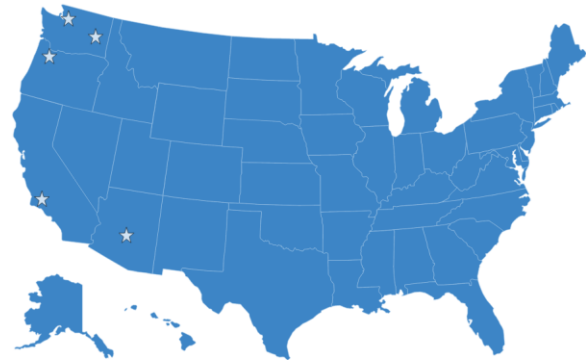


Glendive - DMA	2015	2010	Great Falls - DMA	2015	2010
Minneapolis - St. Paul, MN	1	-	Spokane, WA	1	2
Fargo - Valley City, ND	2	-	Seattle - Tacoma, WA	2	3
Portland, OR	3	-	Los Angeles, CA	3	4
Duluth - Superior, MN	4	-	Portland, OR	3	-
Madison, WI	5	-	Phoenix, AZ	5	-
			Salt Lake City, UT	-	1
			Idaho Falls-Pocatello, ID	-	5

Helena DMA Rankings 2015

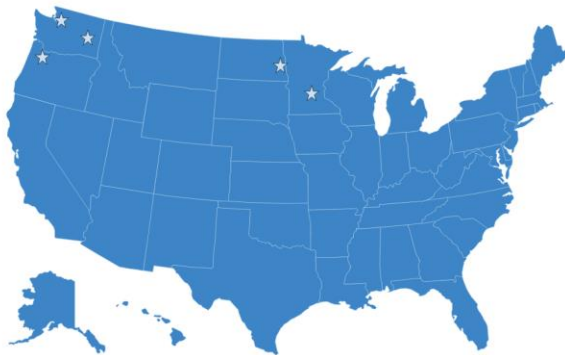


Kalispell DMA Rankings 2015

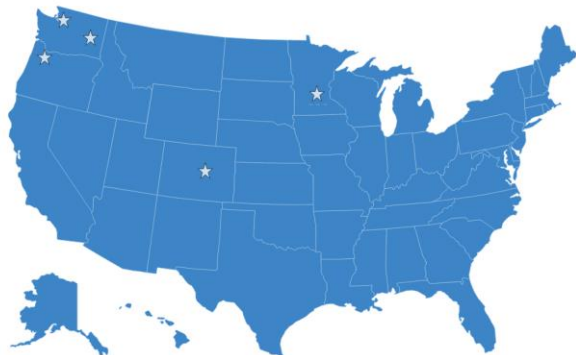


Helena - DMA	2015	2010	Kalispell - DMA	2015	2010
Seattle - Tacoma, WA	1	2	Spokane, WA	1	-
Spokane, WA	2	4	Seattle - Tacoma, WA	2	1
Denver, CO	3	-	Los Angeles, CA	3	-
Portland, OR	4	4	Portland, OR	4	4
Salt Lake City, UT	4	1	Phoenix, AZ	5	6
Tucson-Nogales, AZ	-	3	Denver, Co	-	2
Idaho Falls, ID	-	4	Salt Lake City, UT	-	3
			San Diego, CA	-	5

Miles City DMA Rankings 2015



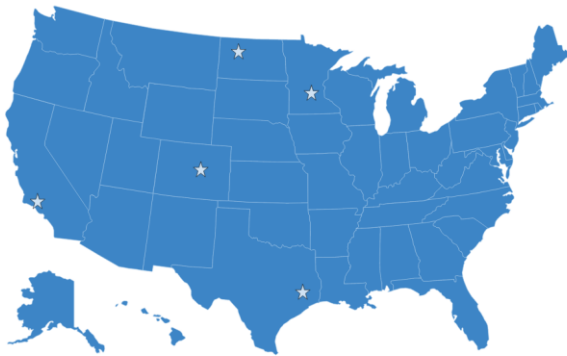
Missoula DMA Rankings 2015



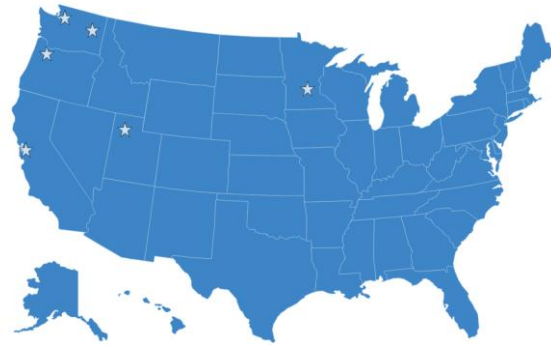
Miles City - DMA	2015	2010	Missoula - DMA	2015	2010
Minneapolis - St. Paul, MN	1	1	Seattle - Tacoma, WA	1	1
Fargo - Valley City, ND	2	2	Spokane, WA	2	2
Spokane, WA	2	-	Portland, OR	3	-
Portland, OR	3	-	Minneapolis - St. Paul, MN	4	6
Seattle - Tacoma, WA	3	3	Denver, CO	5	5
Denver, Boise, Minot, Eugene	-	3	Salt Lake City, UT	-	3
			Idaho Falls-Pocatello, ID	-	4



Red Lodge DMA Rankings 2015

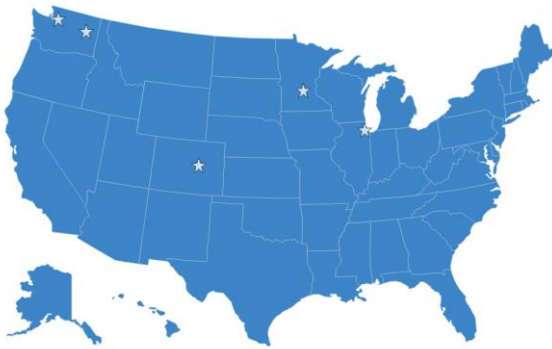


West Yellowstone DMA Rankings 2015



Red Lodge - DMA	2015	2010	West Yell. - DMA	2015	2010
Minneapolis - St. Paul, MN	1	-	Minneapolis - St. Paul, MN	1	3
Billings, MT	2	-	Salt Lake City, UT	1	1
Minot - Bismarck, ND	2	-	Seattle - Tacoma, WA	1	4
Denver, CO	3	-	Portland, OR	2	6
Houston, TX	3	-	Spokane, WA	3	5
			Denver, CO	-	2
			Houston, TX	-	5

Whitefish DMA Rankings 2015



Whitefish - DMA	2015	2010
Seattle - Tacoma, WA	1	-
Spokane, WA	2	-
Minneapolis - St. Paul, MN	3	1
Chicago, IL	4	4
Denver, CO	5	-
Los Angeles	-	2
Idaho Falls-Pocatello, ID	-	2
Salt Lake City, UT	-	3
Portland, OR; Fargo, ND	-	4

## Summary and Marketing Implications

The Designated Marketing Areas (DMAs) represented by Montana's diverse visitor base indicate exciting opportunities for the future and successes from the past. As displayed across nearly every segment comparison, Washington is a primary driver for visitation. This should not come as a surprise due to its proximity to Montana, but also represents the fact that Montana is an attractive destination for those residents. Overall, Montana's target markets appear to reside within the Western US with some notable exceptions. Minneapolis-St. Paul, MN, Chicago, IL, and New York, NY are three major DMAs east of the Rocky Mountains that show up in the analysis. However, a number of the top DMAs are still lacking equivalent representation to their population ratio which signifies areas for targeting. For instance, New York City is underrepresented by roughly five percent from its television market share. While statistically it seems beneficial to seek the NYC market, common sense due to cost of promoting in that area would suggest otherwise. Similarly, other major DMAs such as Los Angeles, Philadelphia, and Dallas-Ft. Worth are possible major cities to promote in but only if the cost of promotion is worth the return on investment.

Montana sees much success in many of the smaller DMA markets. Spokane, WA, Salt Lake City, UT, and Fargo-Valley City, ND are three smaller DMAs that see a strong representation in this analysis. Montana is a popular draw for many Midwestern residents as it is one of the closest states with mountainous terrain to visit. With that said, competition in the Rockies is fierce, yet Montana still tends to be a strong choice for many people. This is promising as visitation continues to grow at a steady pace.

Residents in the DMAs that are well represented have shorter drive times, easily accessible flights, and may be looking for something they do not have at home. This might be where the idea of marketing to the geotraveler really fits for Montana. With the open, (mostly) uncrowded areas of Montana, the small rural feel to the state and its people, Montana can and does appeal to the visitor who may want to immerse him/herself in to a relaxed stress-free, and beautiful setting.

In the final analysis many of these DMA's are strong in both repeat as well as first time visitors suggesting there are still more people residing in these DMA's who have not yet been to Montana. Promotion in these same areas can still be justified.