

FY10
Annual Report
Missouri Division of Tourism



Photo Courtesy of Branson Zipline Canopy Tours

Letter from the Governor

From its picturesque outdoor opportunities to its unique, world-class cities, Missouri truly is a wonderful destination for anyone.

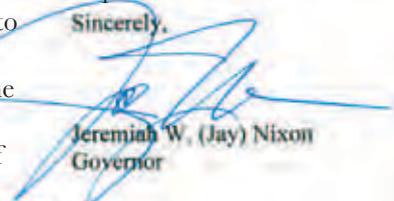
I commend all partners working with the Division of Tourism, representing every sector that touches tourism and every region in Missouri, for their collaborative efforts in making sure Missouri's tourism brand is promoted at every opportunity, so that when people both inside and outside our state think destination, they think Missouri. Whether you are representing a local convention and visitors bureau, restaurant association, hotel and lodging association, AgriMissouri, an association for RV drivers or for bed and breakfasts, the wine and grape industry, or a marketing and public relations firm, we all share the same goals. We must increase occupancy in our hotel rooms, bring in more attendees to festivals, fill more seats at events, have more folks enjoying the outdoors in one of our parks, and have more people enjoying what Missouri has to offer, because it is vital to our economy and quality of life as we go forward.

We know that travelers are always looking to get the best vacation experience they can with the precious dollars they spend. Working together with all facets of

the tourism industry, we have a successful balance of a public-private partnership to market Missouri as an affordable and family-friendly destination where our many wonderful attractions are always close to home, as our slogan goes, but far from ordinary. And you don't have to take less of a vacation if you come to Missouri, you can take a vacation for less.

Congratulations to our tourism team that plans strategically, executes smart marketing programs that keep visitors coming, keeps money flowing into the local and state economy and keeps Missouri's image desirable. Their efforts create jobs, boost investment and help move our state economy in the most important direction - forward.

Sincerely,



Jeremiah W. (Jay) Nixon
Governor



Governor Jeremiah W. (Jay) Nixon

Letter from the Director

The Missouri Division of Tourism proudly submits the 2010 Annual Report. We believe the report is a fair and accurate description of how we have met the Division's responsibilities and duties as set forth in Section 620.450 to 620.465 RSMo.

Tourism is a \$11.4 billion industry for the Show-Me State, supports 281,255 jobs and provides \$900 million in state and local taxes for communities each year. Missouri receives \$3.00 in state tax revenues from every dollar invested in the MDT budget.

There has been a major retrenchment in the tourism industry over the past two years, as the U.S. economy has faltered, and travel hit a downturn after years of increases. Nationally, travel in 2010 picked up slightly and is expected to continue its upward path this year. Confidence is replacing caution which is good news for the industry, and further good news for Missouri's economy.

The significant, combined benefits of investing in tourism weigh positively not only on our economy but also on our culture. Tourism investments convert to job

creation, which translates into more taxes paid, more money for infrastructure and a better economy. In addition, promoting the benefits of travel for health, education, creativity and job performance, as well as the travel benefit to overall well-being, contribute to a better Missouri.

The Missouri Tourism Commission and Division of Tourism staff members are passionate about promoting Missouri. We will continue to be enthusiastic and aggressive as we work with all of our partners to the mutual benefit of the economy of our Missouri communities.



Katie Steele Danner



Director, Missouri Division of Tourism

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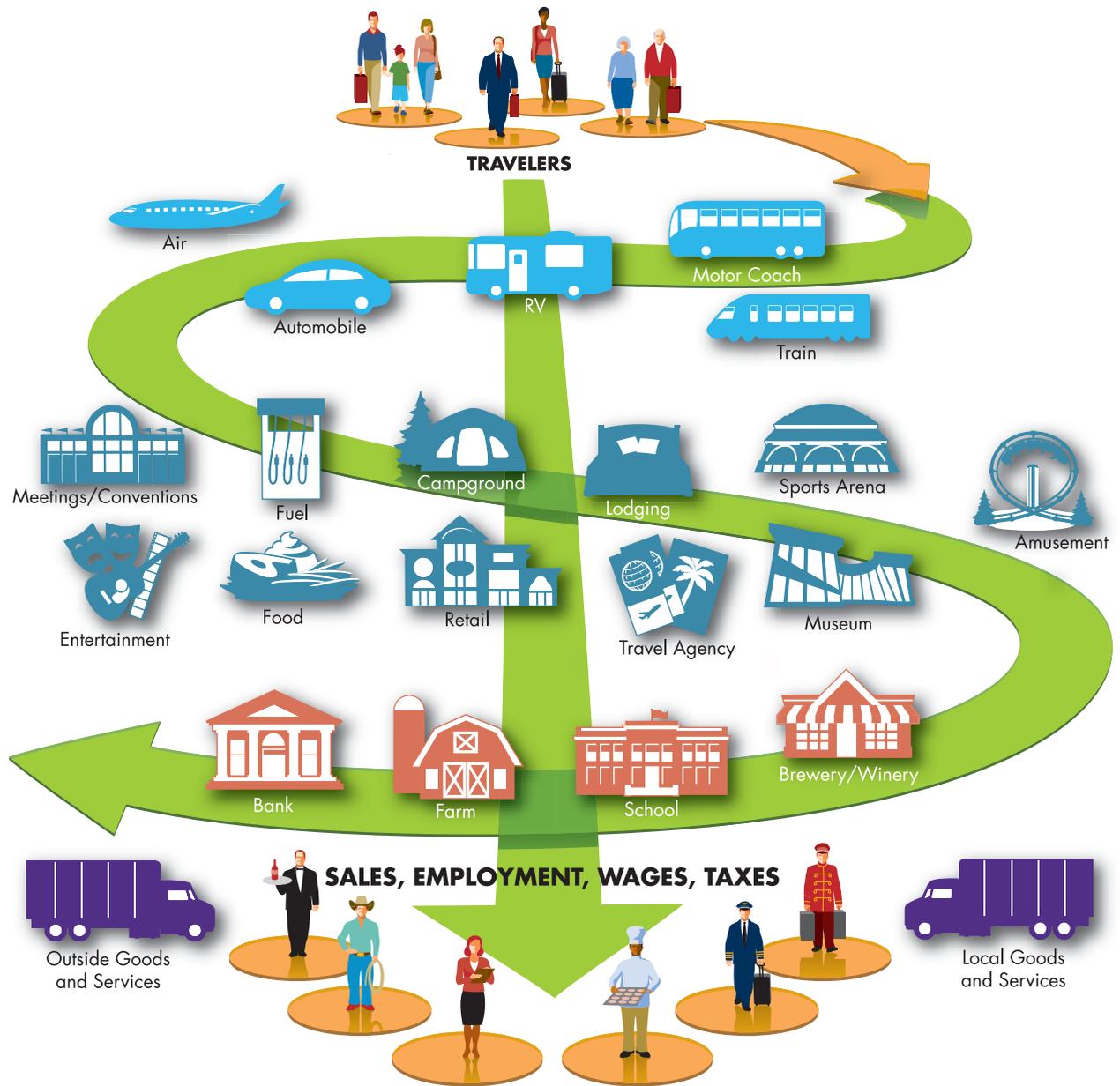
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Front cover clockwise: *The Wabash Frisco and Pacific Railroad Association, Glencoe; 66 Drive-Inn, Carthage; Blue Room, Kansas City; Bennett Spring State Park, Lebanon and Branson Zipline Canopy Tours*
Back cover: *Missouri State Capitol, Winning PictureMO photo by Christy Nowlin*

Tourism Works for Missouri



The expenditures of travelers in Missouri have a substantial impact on Missouri’s economy. The above graphic illustrates how the dollars spent by travelers reach far beyond what is considered a typical tourism-related business. Wheat, grapes, livestock and other products are grown by farmers in Missouri and used in products such as wine, beer and food served at Missouri eateries. Missouri’s gaming industry provides

funding for the schools that teach children, our leaders of tomorrow. At first glance, the reach of a tourism dollar may seem short lived, but the actual impact of that dollar is far reaching and touches many businesses and services in Missouri. In short, the impact of the state’s tourism industry is felt by travelers and those who call Missouri home.

Original Graphic Source: US Travel Association

Missouri Tourism Commission and Missouri Budgets



MARCI BENNETT
Chairwoman
St. Joseph



SCOTT HOVIS
Vice Chairman
Jefferson City



LT. GOVERNOR PETER KINDER
Cape Girardeau



SENATOR JACK GOODMAN
Mt. Vernon



SENATOR RYAN MCKENNA
Crystal City



REPRESENTATIVE MAYNARD WALLACE
Thornfield



REPRESENTATIVE GINA WALSH
St. Louis



KELLY SWANSON
Kimberling City

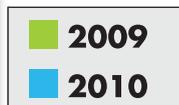
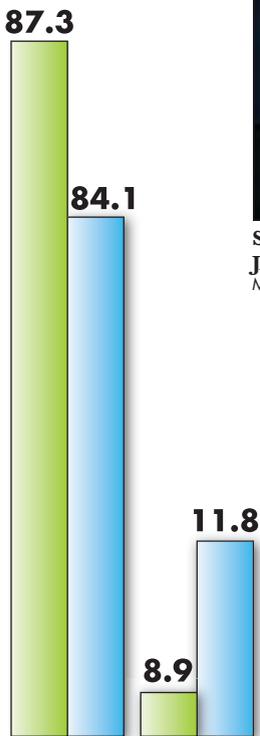
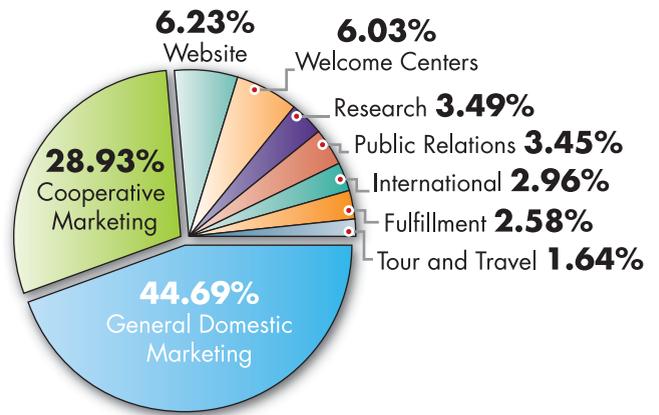


ERIC RHONE
St. Louis

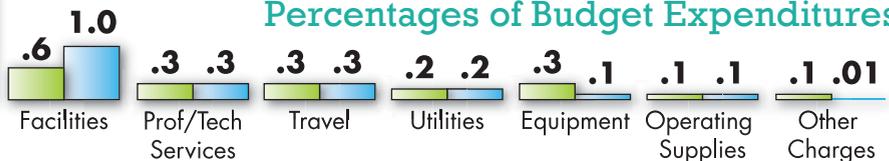


JOHN JOSLYN
Branson

Marketing Budget by Program



Percentages of Budget Expenditures



The Missouri Tourism Story

The Missouri Tourism Commission advocates the sound development of the travel and tourism industry in Missouri. Created in 1967 by the 74th General Assembly, the Missouri Division of Tourism (MDT) is the administrative arm of the Commission and operates under its direction. The Commission consists of 10 members including the lieutenant governor; two senators of different political parties, appointed by the President Pro Tem; two representatives of different political parties, appointed by the Speaker of the House; and five Governor appointees who serve staggered, four-year terms.

Among other duties it:

- Recommends programs that will promote the state as a travel and tourism destination.
- Employs a director qualified by education, experience in public administration, and background in the use of news media and advertising mediums to promote tourism. The director employs a professional staff.
- Promotes the exchange of ideas and information on travel and tourism between state and local government agencies, private organizations and individuals.

The Division of Tourism’s budget is computed through legislation passed in 1993 and commonly referred to as H.B. 188.

The overall premise of the bill is simple. Year after year, the tourism industry continues to be one of our state’s top industries; as such, the tourism industry generates significant sales tax revenues. In fiscal year 2010, direct tourism spending in Missouri totaled more than \$7.42 billion. The Division of Tourism’s budget is determined by sharing this growth of sales tax revenues generated by the industry with the general revenue fund of the State of Missouri. If the industry grows, the Division of Tourism’s budget is rewarded with an increase. If it does not grow, the budget does not increase.

This nationally recognized funding formula was established to provide reliable funding for the MDT, allowing the Division to be competitive with other states in promoting tourism; it takes the MDT out of the fight for general revenue funds; and it DOES NOT increase taxes.

Due to the state budget constraints, the MDT budget is not currently fully funded. To meet this challenge, the MDT staff and commission continually review all expenses and operations to ensure that we are fulfilling our mission in the most successful way. This past year,

we evaluated all of our activities with the following principles and assumptions:

1. Preserve as much co-op marketing funding as possible given the budget constraints.
2. Cut aggressively in non-media related line items in order to maximize the working media investment and resulting media impressions.
3. Maximize funding within the most efficient, proven mediums with a focus on out-of-state markets (to maximize new dollars into the state).
4. Identify budget line items where a one-year hiatus is acceptable, and will not compromise the program longer-term.
5. Continue the development of VisitMO.com given its central role in travel planning.

MDT employs a staff of 18 at the Jefferson City administrative offices and 45 staff in the Missouri Welcome Centers. On the international scene, due to budget restraints, MDT currently has contracted representation only for Canada.

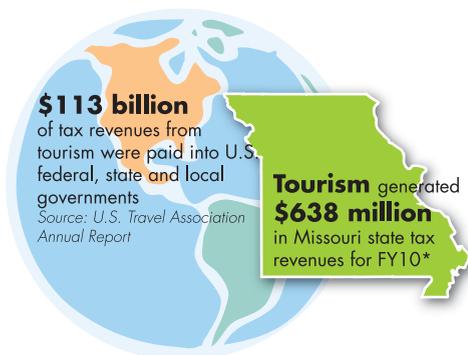
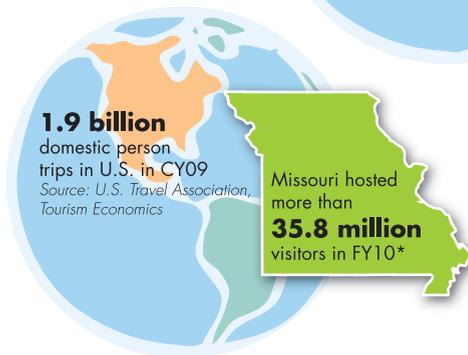
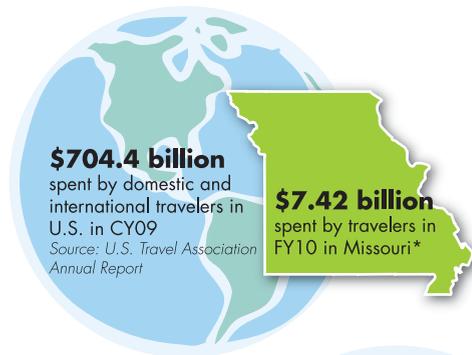
In fiscal year 2010, direct tourism spending in Missouri totaled more than \$7.42 billion.

17 Tourism-Related SIC Codes

	SIC CODE	SIC CODE TITLE
1	5811	Eating Places Only
2	5812	Eating and Drinking Places
3	5813	Drinking Places – Alcohol Beverage Only
4	7010	Hotel, Motel, and Tourist Courts
5	7020	Rooming and Boarding Houses
6	7030	Camps and Trailer Parks
7	7033	Trailer Parks and Camp Sites
8	7041	Organization Hotel and Lodging Houses
9	7920	Producers, Orchestras, Entertainers
10	7940	Commercial Sports
11	7990	Misc. Amusement and Recreational
12	7991	Boat and Canoe Rentals
13	7992	Public Golf Courses and Swimming Pools
14	7996	Amusement Parks
15	7998	Tourist Attractions
16	7999	Amusement NEC (not elsewhere classified)
17	8420	Botanical and Zoological Gardens

The Nationwide View of Tourism and Missouri's Top Numbers

The latest annual, international statistics specific to Missouri available at the time of publishing this report are for calendar year 2008.



More Missouri Top Tourism Numbers

1. Travel is a \$11.4 billion industry for the Show-Me State.*
2. The state of Missouri receives \$3.00 in state tax revenues from every dollar invested in the Division of Tourism's budget.
 (Source: SMARI and the University of Missouri)
3. For every \$1 Missouri invests in marketing tourism, \$53 is returned in visitor expenditures.
 (Source: SMARI)
4. Travelers spent \$168.97 per person per trip during FY10.*
5. Missouri Welcome Centers generated approximately \$12.8 million annually in additional (incremental) visitor spending.
 (Source: Jerry Henry and Associates)
6. Each motor coach is estimated to bring \$22,000 in visitor spending to Missouri.
 (Source: Davidson Peterson)

*Source: TNS Travels America and Kaylen Economics

**Estimates based upon aggregate Visa card usage data from VisaVue® Travel. Due to budget restrictions, updated data is unavailable.

Tourism Spending and Tourism-Related Employment by Marketing Region

COUNTY NAME	FY10 Total Expenditures in 17 Tourism-Related SIC codes*	FY10 Tourism-Related Employment*
NORTHWEST REGION		
ANDREW COUNTY	\$17,600,137	245
ATCHISON COUNTY	\$11,307,481	234
BUCHANAN COUNTY	\$148,744,726	4,414
CALDWELL COUNTY	\$1,234,175	66
CARROLL COUNTY	\$5,889,460	160
CASS COUNTY	\$94,714,988	2,603
CHARITON COUNTY	\$2,918,874	84
CLAY COUNTY	\$331,979,912	11,995
CLINTON COUNTY	\$9,507,374	355
DAVISS COUNTY	\$3,809,393	91
DEKALB COUNTY	\$15,048,778	313
GENTRY COUNTY	\$1,841,416	103
GRUNDY COUNTY	\$7,463,236	220
HARRISON COUNTY	\$12,258,068	316
HOLT COUNTY	\$7,318,219	115
HOWARD COUNTY	\$4,083,197	354
JACKSON COUNTY	\$1,464,685,298	36,440
LAFAYETTE COUNTY	\$26,089,148	832
LINN COUNTY	\$7,745,866	351
LIVINGSTON COUNTY	\$16,716,980	454
MERCER COUNTY	\$1,068,993	34
NODAWAY COUNTY	\$22,929,938	782
PLATTE COUNTY	\$249,200,449	6,774
PUTNAM COUNTY	\$890,107	31
RAY COUNTY	\$10,899,483	366
SALINE COUNTY	\$17,687,450	669
SULLIVAN COUNTY	\$1,717,179	32
WORTH COUNTY	\$562,541	26
TOTAL NORTHWEST REGION	\$2,495,912,866	68,459

*Source: Missouri Departments of Revenue and Labor and Industrial Relations



Tourism Spending and Tourism-Related Employment by Marketing Region

COUNTY NAME	FY10 Total Expenditures in 17 Tourism-Related SIC codes*	FY10 Tourism-Related Employment*
NORTHEAST REGION		
ADAIR COUNTY	\$32,169,991	1,404
AUDRAIN COUNTY	\$16,973,142	508
CLARK COUNTY	\$2,332,393	86
FRANKLIN COUNTY	\$105,666,348	3,524
GASCONADE COUNTY	\$15,186,189	577
JEFFERSON COUNTY	\$191,548,067	5,671
KNOX COUNTY	\$788,213	60
LEWIS COUNTY	\$3,357,291	416
LINCOLN COUNTY	\$33,405,601	1,109
MACON COUNTY	\$17,359,382	455
MARION COUNTY	\$42,755,684	1,454
MONROE COUNTY	\$3,438,930	98
MONTGOMERY COUNTY	\$7,285,002	258
PIKE COUNTY	\$11,516,441	414
RAILS COUNTY	\$5,869,924	133
RANDOLPH COUNTY	\$21,943,343	759
SCHUYLER COUNTY	\$1,187,773	12
SCOTLAND COUNTY	\$2,101,148	75
SHELBY COUNTY	\$1,433,374	119
ST. CHARLES COUNTY	\$555,631,146	18,217
ST. LOUIS CITY	\$1,084,887,029	24,461
ST. LOUIS COUNTY	\$2,060,297,259	60,422
WARREN COUNTY	\$23,049,308	675
TOTAL NORTHEAST REGION	\$4,240,182,978	120,907

*Source: Missouri Departments of Revenue and Labor and Industrial Relations

PictureMO entry of a St. Louis sunrise

Statewide Tourism Employment by Fiscal Year



Tourism Spending and Tourism-Related Employment by Marketing Region

COUNTY NAME	FY10 Total Expenditures in 17 Tourism-Related SIC codes*	FY10 Tourism-Related Employment*
CENTRAL REGION		
BENTON COUNTY	\$13,789,041	355
BOONE COUNTY	\$306,953,115	9,461
CALLAWAY COUNTY	\$34,646,373	1,346
CAMDEN COUNTY	\$143,145,705	3,675
COLE COUNTY	\$122,321,895	3,746
COOPER COUNTY	\$15,749,520	971
DALLAS COUNTY	\$10,780,232	357
HENRY COUNTY	\$27,201,833	747
HICKORY COUNTY	\$4,594,427	168
JOHNSON COUNTY	\$49,901,987	1,826
LACLEDE COUNTY	\$44,564,896	1,123
MARIES COUNTY	\$3,018,562	82
MILLER COUNTY	\$26,942,703	681
MONITEAU COUNTY	\$7,851,121	320
MORGAN COUNTY	\$17,932,003	439
OSAGE COUNTY	\$4,470,224	228
PETTIS COUNTY	\$59,624,689	1,808
PULASKI COUNTY	\$65,519,712	2,761
ST. CLAIR COUNTY	\$2,967,259	46
TOTAL CENTRAL REGION	\$961,975,297	30,140

*Source: Missouri Departments of Revenue and Labor and Industrial Relations



Gordon Drake Memorial Harbor, Warsaw

Tourism Spending and Tourism-Related Employment by Marketing Region

COUNTY NAME	FY10 Total Expenditures in 17 Tourism-Related SIC codes*	FY10 Tourism-Related Employment*
SOUTHWEST REGION		
BARRY COUNTY	\$34,583,970	922
BARTON COUNTY	\$9,390,576	425
BATES COUNTY	\$19,039,701	350
CEDAR COUNTY	\$9,405,581	310
CHRISTIAN COUNTY	\$60,830,627	1,887
DADE COUNTY	\$1,961,544	55
DOUGLAS COUNTY	\$7,412,153	209
GREENE COUNTY	\$527,365,714	15,834
JASPER COUNTY	\$165,978,554	4,862
LAWRENCE COUNTY	\$19,701,718	689
MCDONALD COUNTY	\$8,728,419	289
NEWTON COUNTY	\$80,185,866	1,959
OZARK COUNTY	\$5,662,820	190
POLK COUNTY	\$21,202,446	504
STONE COUNTY	\$131,783,555	1,539
TANEY COUNTY	\$422,473,155	10,939
VERNON COUNTY	\$14,828,033	470
WEBSTER COUNTY	\$20,602,448	547
WRIGHT COUNTY	\$10,270,102	331
TOTAL SOUTHWEST REGION	\$1,571,406,982	42,311

*Source: Missouri Departments of Revenue and Labor and Industrial Relations



White Water, Branson

Tourism Spending and Tourism-Related Employment by Marketing Region

COUNTY NAME	FY10 Total Expenditures in 17 Tourism-Related SIC codes*	FY10 Tourism-Related Employment*
SOUTHEAST REGION		
BOLLINGER COUNTY	\$3,546,726	111
BUTLER COUNTY	\$63,759,770	1,643
CAPE GIRARDEAU COUNTY	\$143,551,473	4,098
CARTER COUNTY	\$6,429,682	239
CRAWFORD COUNTY	\$27,514,132	645
DENT COUNTY	\$12,567,370	362
DUNKLIN COUNTY	\$25,840,227	633
HOWELL COUNTY	\$46,390,312	1,313
IRON COUNTY	\$5,264,706	187
MADISON COUNTY	\$7,006,589	251
MISSISSIPPI COUNTY	\$9,292,972	241
NEW MADRID COUNTY	\$21,067,445	367
OREGON COUNTY	\$4,957,291	166
PEMISCOT COUNTY	\$12,028,295	624
PERRY COUNTY	\$17,643,674	702
PHELPS COUNTY	\$65,285,185	1,997
REYNOLDS COUNTY	\$3,908,222	107
RIPLEY COUNTY	\$7,030,801	225
SCOTT COUNTY	\$45,124,150	1,289
SHANNON COUNTY	\$4,610,068	175
ST. FRANCOIS COUNTY	\$81,822,386	2,230
STE. GENEVIEVE COUNTY	\$10,536,427	421
STODDARD COUNTY	\$26,471,253	601
TEXAS COUNTY	\$12,065,239	354
WASHINGTON COUNTY	\$9,943,225	261
WAYNE COUNTY	\$7,353,032	194
TOTAL SOUTHEAST REGION	\$681,010,652	19,436
STATEWIDE GRAND TOTAL FY10	\$9,950,488,775	281,253

*Source: Missouri Departments of Revenue and Labor and Industrial Relations

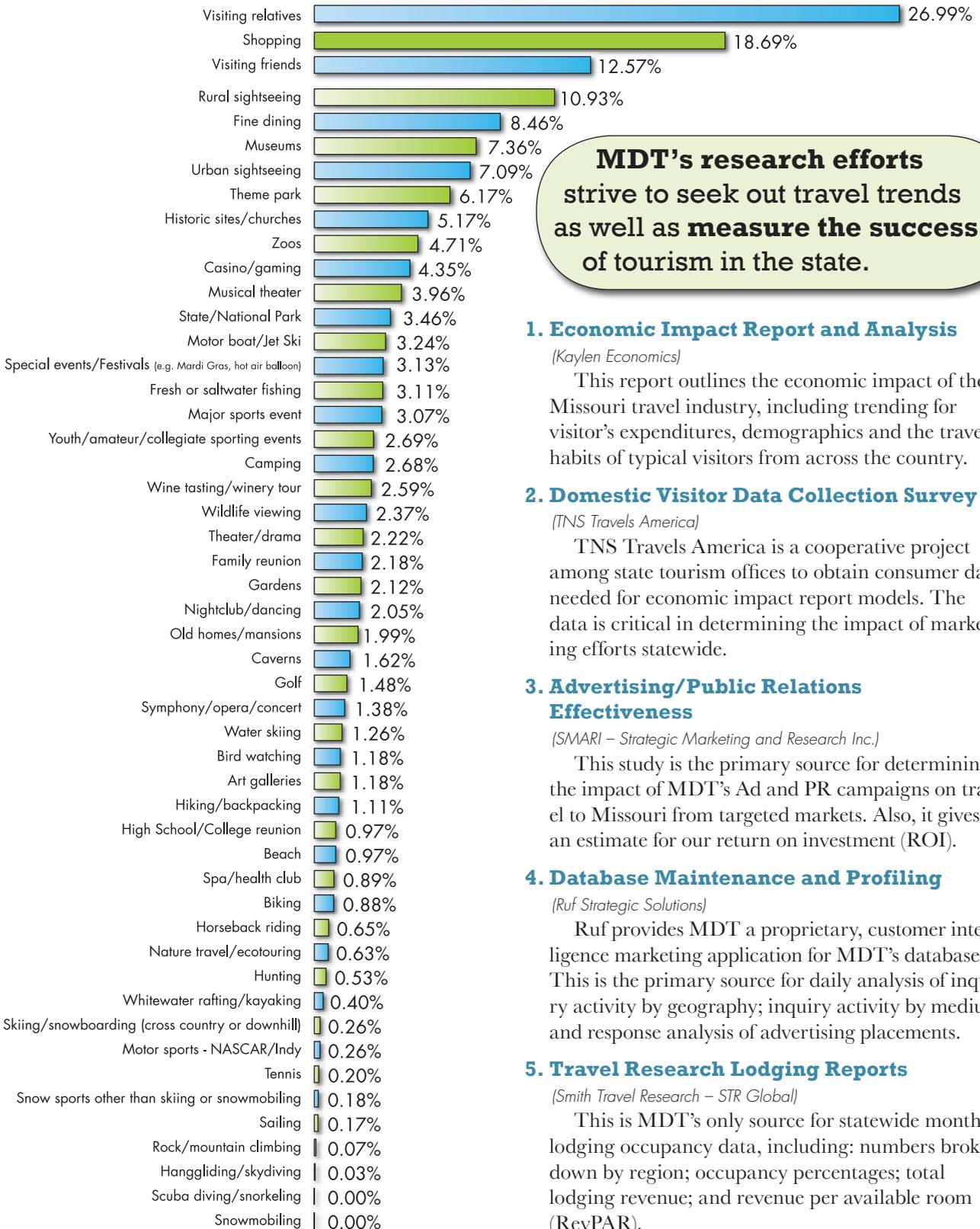
Annual Sales Tax and Expenditures on 17 Tourism-Related SIC Codes

Year	Sales Tax on the 17 SIC Code Sales Sales tax rate = 4.225%	Total Sales/ Expenditures on the 17 SIC Codes	Year	Sales Tax on the 17 SIC Code Sales Sales tax rate = 4.225%	Total Sales/ Expenditures on the 17 SIC Codes
2001	\$317,020,546	\$7,503,444,879	2006	\$384,172,163	\$9,092,832,259
2002	\$323,658,919	\$7,660,566,136	2007	\$405,672,398	\$9,601,713,554
2003	\$327,971,491	\$7,762,638,843	2008	\$430,119,528	\$10,180,343,850
2004	\$346,083,562	\$8,191,326,903	2009	\$427,442,598	\$10,116,984,559
2005	\$362,368,106	\$8,576,759,915	2010*	\$420,408,151	\$9,950,488,770

*2010 figures are a preliminary run. The Department of Revenue will not have the final figures until Sept. 1, 2011.

Research Projects ... WHAT WE LEARN

Domestic Visitors' Activities by Percentage



MDT's research efforts strive to seek out travel trends as well as measure the success of tourism in the state.

1. Economic Impact Report and Analysis

(Kaylen Economics)

This report outlines the economic impact of the Missouri travel industry, including trending for visitor's expenditures, demographics and the travel habits of typical visitors from across the country.

2. Domestic Visitor Data Collection Survey

(TNS Travels America)

TNS Travels America is a cooperative project among state tourism offices to obtain consumer data needed for economic impact report models. The data is critical in determining the impact of marketing efforts statewide.

3. Advertising/Public Relations Effectiveness

(SMARI – Strategic Marketing and Research Inc.)

This study is the primary source for determining the impact of MDT's Ad and PR campaigns on travel to Missouri from targeted markets. Also, it gives us an estimate for our return on investment (ROI).

4. Database Maintenance and Profiling

(Ruf Strategic Solutions)

Ruf provides MDT a proprietary, customer intelligence marketing application for MDT's database. This is the primary source for daily analysis of inquiry activity by geography; inquiry activity by medium; and response analysis of advertising placements.

5. Travel Research Lodging Reports

(Smith Travel Research – STR Global)

This is MDT's only source for statewide monthly lodging occupancy data, including: numbers broken down by region; occupancy percentages; total lodging revenue; and revenue per available room (RevPAR).

Research Projects

6. Website Study – Profile of Website Users

(Tourvey/Texas A&M)

This report outlines how usage of VisitMO.com compares to other travel sites. It evaluates VisitMO’s effectiveness, and compiles details on users of our website. From this, we track the resulting travel generated to Missouri and what influence VisitMO had upon those travel decisions. This information is compared with data on users who did not visit Missouri, thereby evaluating the functionality and effectiveness of VisitMO.

7. Destination Awareness Study

(TNS Travels America)

The Destination Awareness Study (last conducted in 2003) established a baseline of awareness of Missouri and an image of Missouri as a travel destination. A new study was deemed critical, if we were to learn whether campaigns from 2003 forward had any impact upon awareness. Therefore, in the fall of 2009, a study was conducted to assess: what is

important to travelers; Missouri’s competitive position in the general marketplace; and to determine perceived strengths that differentiate Missouri from our competitors.

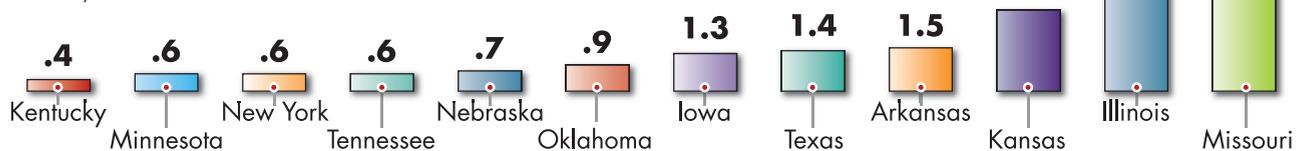
8. Advertising and Concept Testing

(SMARI – Strategic Marketing and Research Inc.)

MDT budgets millions of dollars for media buys. Testing new advertising creative concepts, prior to launching a campaign, is savvy marketing. For the 2010 campaign, creative ideas and presentations were thoroughly tested using focus groups, and public acceptance was confirmed prior to launch.

Top Originating States of Missouri Visitors (in millions)

Source: Kaylen Economics



Missouri Hotel Performance by Region, FY10 Compared to FY09

Area	Occupancy		Average Daily Rate		Revenue Per Available Room (RevPAR)	
	Percent	% Change	Amount	% Change	Amount	% Change
Missouri Statewide	51.3	-2.6	\$77.20	-1.8	\$39.90	-4.3
Missouri North	51.6	-3.1	\$66.40	0.4	\$34.40	-2.7
Missouri South	46.0	-5.0	\$71.70	1.8	\$33.20	-3.2
Columbia/Jefferson City	48.5	-0.7	\$70.10	-1.1	\$34.20	-1.8
Missouri North Area	54.2	-4.9	\$63.60	1.4	\$34.60	-3.5
Springfield, MO MSA	49.3	-6.9	\$66.80	-1.5	\$33.00	-8.3
Missouri South Central	51.1	2.7	\$72.70	1.8	\$37.50	4.5
Branson	39.6	-3.9	\$79.20	3.4	\$31.70	-0.6
Missouri South Area	50.5	-8.9	\$63.40	2.1	\$32.10	-6.9
Kansas City	54.9	-2.2	\$79.20	-3.5	\$48.80	-5.4
St. Louis	55.4	-0.4	\$83.40	-4.6	\$46.50	-4.9
Lake of the Ozarks	50.0	2.1	\$83.80	0.5	\$42.90	2.5

Source: Smith Travel Research Inc./STR Global, Ltd.

Domestic Marketing

'Vacation for Less' Campaign

In 2009, MDT developed a compelling advertising campaign for the 2010 travel season, featuring the tagline: "Don't Take Less of a Vacation, Take a Vacation for Less, in Missouri."

With consumers facing increasing economic concerns, it was imperative we develop an advertising message aimed at the "staycation" mindset, encouraging visitors to travel close to home, while offering them realistic vacation options without breaking their budgets.

The campaign consisted of television spots, print ads, African American targeted radio spots and online ads targeting adults, ages 25-54, primarily in out-of-state markets: Iowa, Illinois, Indiana, Kentucky, Tennessee, Arkansas, Oklahoma, Kansas and Nebraska.

Destination awareness research, conducted by TNS, indicated MDT's target consumers ranked "value for the money" and "reasonable costs for accommodations" as the top two factors in selecting travel destinations. Additionally, a conversion study for eblast marketing, conducted by Jerry Henry and Assoc., indicated consumers requested more information regarding "pricing, discounts and coupons." These studies helped MDT determine the 'Vacation for Less' advertising message.

MDT's target consumers ranked **"value for the money"** and **"reasonable costs for accommodations"** as the top two factors in selecting travel destinations.



Domestic Marketing

Qualitative ad concept research proved this concept resonated most with consumers, because the ‘Vacation for Less’ campaign was chosen as the favorite among the focus groups.

Preliminary results of the campaign effectiveness were determined through an ad effectiveness study conducted in July of 2010. Despite a nearly 50 percent decrease in MDT’s media budget from 2008, there were still a significant number of households who recalled advertising from the ‘Vacation for Less’ campaign.

The campaign had a positive impact on travelers’ attitudes toward Missouri as a destination and increased interest in visiting, while focusing their planning and information gathering behavior. The message made people more positive about Missouri – especially in terms of an appealing drive-to destination offering a quick and easy getaway.

The new campaign had a positive impact in terms of spurring people to learn more about travel to Missouri.

Those who saw the campaign were much more likely to visit the official website. Most encouraging, people who saw the new campaign indicated they are much more likely to visit Missouri. Additionally, for every dollar Missouri invested in marketing tourism in 2010, \$53 were returned in visitor expenditures.

State Parks Campaign

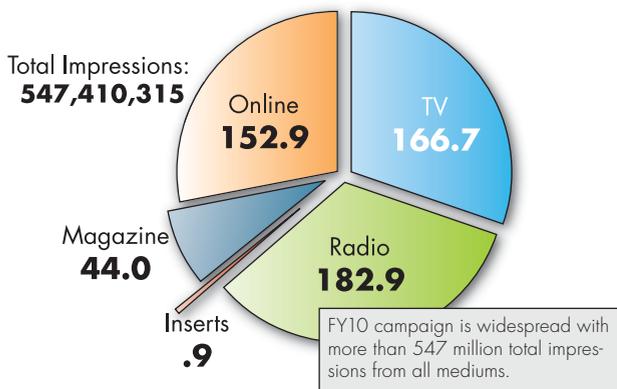
For the 2010 spring travel season, MDT developed an additional advertising campaign to promote Missouri State Parks. Because of decreasing state park attendance, it was necessary to develop a special message aimed at rebuilding the visitor base at Missouri’s most important natural assets – our state parks. Toward this effort, MDT’s advertising agency, Hoffman|Lewis, produced two TV spots, one print ad and several on-line banners. Using existing footage, along with images from MDT’s archives, the campaign built upon strong family connections and the outdoor treasures offered by a trip to Missouri State Parks.

The marketing objective of the state parks’ campaign was to increase state tourism revenues through the increase of both the frequency and duration of vacations in Missouri – specifically, in Missouri State Parks. The advertising campaign positioned Missouri as an affordable and accessible outdoor getaway option for consumers living in the targeted advertising area – within a five-hour drive of Missouri.

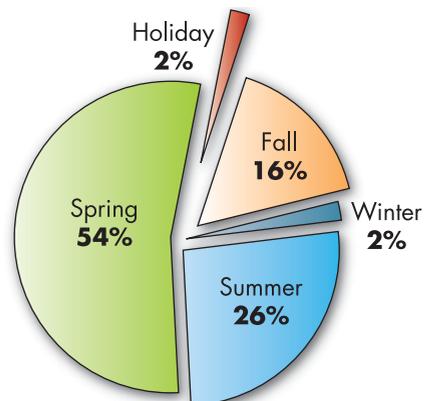
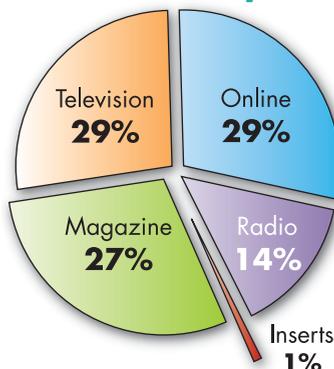
The campaign achieved many of the intended goals. In addition to high recall in the 2010 SMARI ad effectiveness testing, overall camping reservations during the time of the campaign were up 4 percent.

State parks reports their visitor contacts increased by nearly 300,000 people in 2010. Many state parks saw admissions increase by up to 45 percent.

Impressions by Medium in thousands



Domestic Marketing Investment by Medium



Domestic Marketing Advertising Budget by Season

Domestic Marketing



Missouri's Five Marketing Regions

Missouri Moment

In partnership with Fox Sports Midwest in FY10, MDT developed the “Missouri Moment.” TV vignettes, featuring more than 40 destinations across Missouri, aired during St. Louis Cardinals and Kansas City Royals games. These engaging spots included footage that rolled while the game announcers spoke live about each destination. The vignettes were positioned more as “endorsements” rather than regular TV spots. Sixty-six vignettes aired during Cardinals games, and 64 played during Royals games.

Database Enhancements:

In order to see continued success with the email marketing program, it is important to constantly refresh the email database by



Domestic Marketing

acquiring new leads and updating information provided by existing consumers. MDT utilized several strategies to increase the number of database records which include a valid email address.

Sixty-six vignettes aired during Cardinals games and 64 played during Royals games.



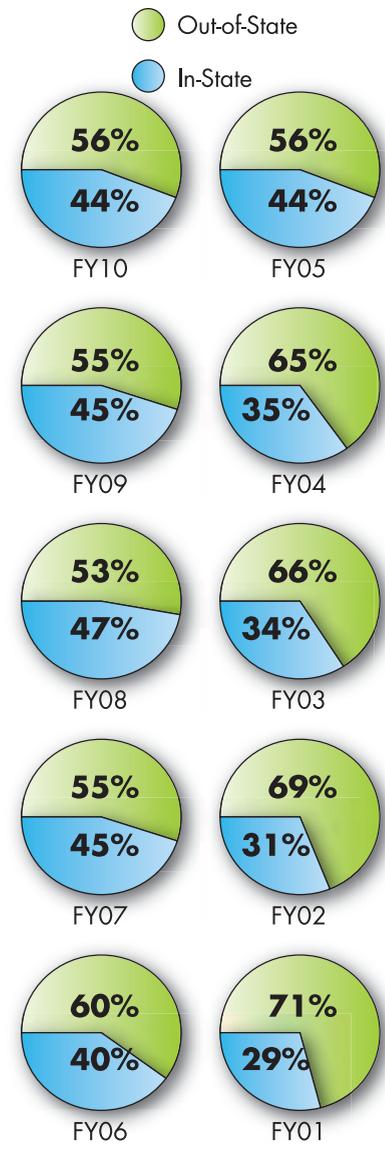
GPS Promotion

With a goal of building and enriching MDT's consumer email database, a sweepstakes was developed to encourage consumers to provide us with their contact information and to rank their interest categories.

To receive future, tailored information from MDT, people could submit their email address, as well as their

In-state vs. Out-of-state Visitors

(Residence status of Missouri travelers)



Source: TNS Travels America and Kaylen Economics

Domestic Marketing

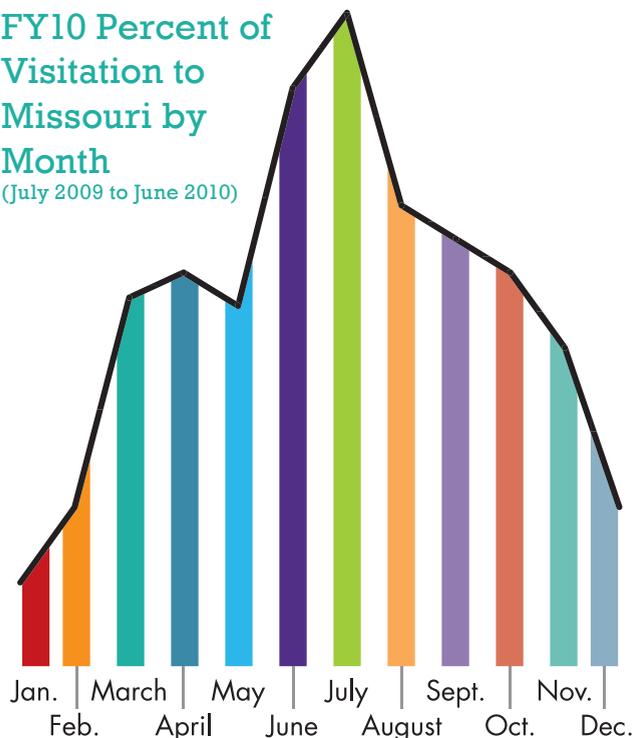
activity preferences, through three methods: complete a reply card they received in a promotion-driven direct mail piece; visit a special micro-website (VisitMO.com/Sweepstakes) that was indicated in the piece; or by clicking a link received in an email blast.

By direct mail or email blast, MDT solicited a response from 55,000 individuals who had, by requesting a printed Travel Guide, expressed a broad, general interest in Missouri. The majority of those consumers resided in Iowa, Illinois, Indiana, Kentucky, Tennessee, Arkansas, Oklahoma, Kansas, Nebraska and Missouri.

As an incentive to respond, a giveaway component was included in the campaign. In return for submitting their email address and activity preferences, consumers were entered into a drawing with a chance to receive one of 25 GPS units which were pre-programmed with destinations that matched the interest categories submitted.

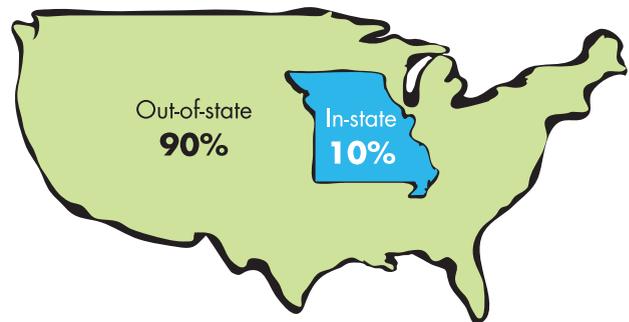
In addition to collecting new consumer opt-ins, MDT achieved its goal of collecting activity-based information from the consumers who responded. MDT received 2,187 reply cards, for a return rate of 3.97 percent. (Industry wide, the average return for this type of campaign is 1 to 2 percent.) Additionally, 904 responses were received on the micro-website. In total,

FY10 Percent of Visitation to Missouri by Month (July 2009 to June 2010)



Source: TNS Travels America and University of Missouri

In-state and Out-of-state Advertising Investment



3,091 people submitted contact and/or preference data, resulting in an overall response rate of 5.63 percent.

Also, the success of this campaign is indicated by the number of hits on VisitMO.com/Sweepstakes. Throughout the 30-day duration of the campaign, the micro-website received more than 2,000 unique visitors, with an average time on the site of nearly three minutes; 67 percent of those visitors completed submission information. Of the emails MDT generated during this promotion, 9 percent opened the email; 5.6 percent of those clicked through to the micro-website.

Append Project

In a review of the MDT database, we discovered that as much as 50 percent of the database's records did not contain an email address. A project was launched to acquire email addresses and append as many records as possible. All consumers were contacted to ensure that communications from Missouri tourism were desired. More than 8,000 records were appended with an email address. This will enhance our integrated marketing strategies for these new contacts.

Email Marketing

In conjunction with the overall advertising campaign, MDT continued the successful Customer Relationship Program that was delivered through targeted email messaging.

The main objective of the email marketing campaign was to continue creating and maintaining ongoing relationships with consumers who have expressed an interest in traveling to and within Missouri. Other objectives for the email campaign were:

- Maintain proactive communications with current and potential travelers, according to their specific areas of interest.

Domestic Marketing

- Influence consumers' behavior, while promoting Missouri as a vacation destination.
- Drive traffic to VisitMO.com.

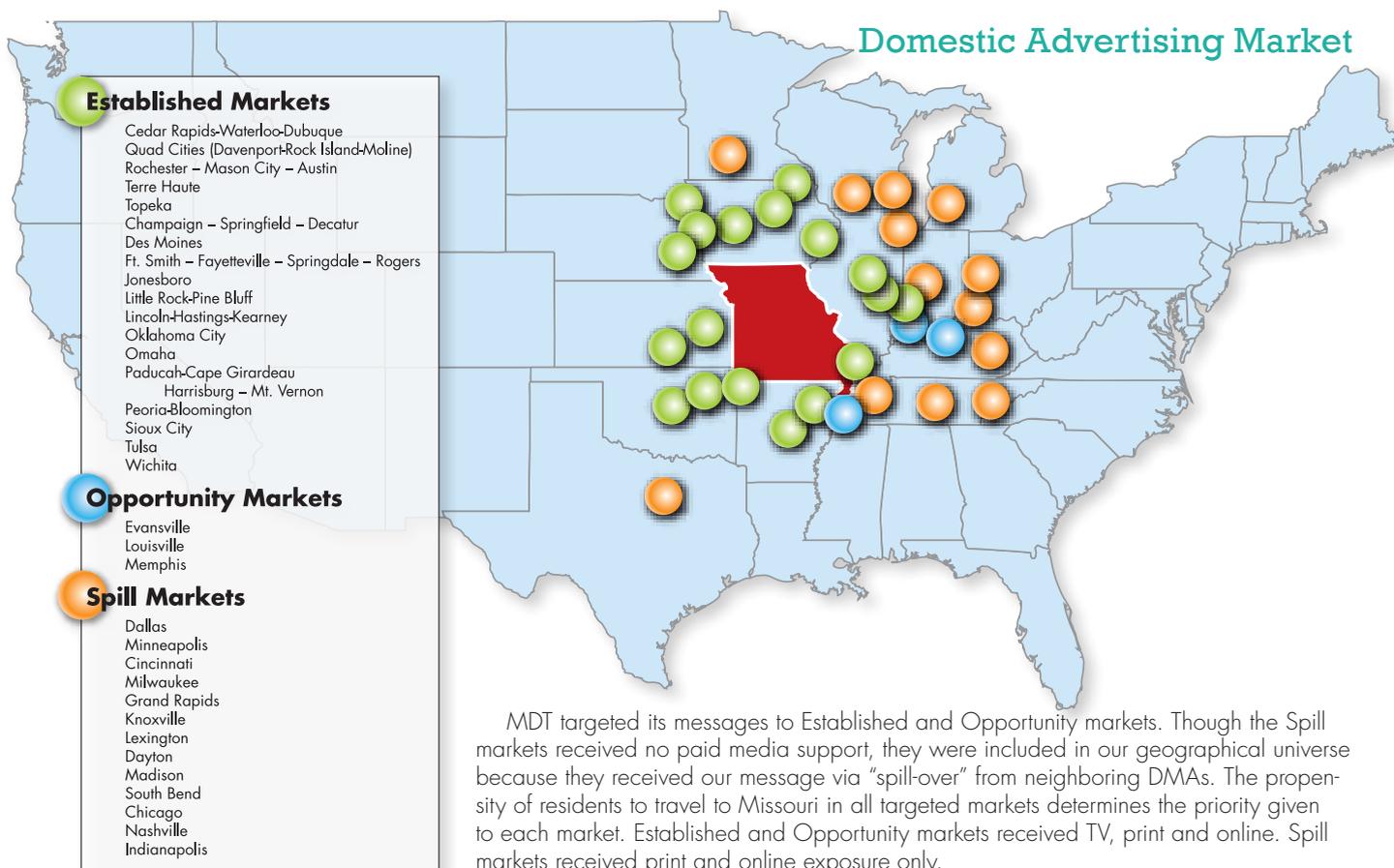
The emails targeted a specific audience, according to their demographics and the areas of travel interest they indicated. The emails were created, themed, written and distributed in 12 interest categories:

1. Arts and Culture
2. Dining and Wine Country
3. Family Fun Escapes
4. Festivals, Concerts and Special Events
5. Live Entertainment and Music
6. Historical Sites, Civil War and Landmarks
7. Hunting, Fishing and Camping
8. Nightlife, Clubs and Casinos
9. Outdoor Adventure, Hiking and Biking
10. National and State Parks
11. Sporting Activities and Golf
12. Water Sports and Boating

Interest categories were narrowed to the months consumers were most likely to participate in these activities, then a year-long calendar was developed to ensure the appropriate emails were sent at the most relevant times of the year.

Email marketing served as a platform to point out that Missouri is close to home, and offers a wide range of activities and events that fit all lifestyles, budgets and interests. Since consumers told us their areas of interest, the content and message of each eblast was developed around those particular interests, so they were only getting the information they wanted.

We monitored the click-thru and view rates of each eblast. Twenty-four ebcasts were sent during FY10, delivering more than 1.2 million impressions. Of those receiving emails, on average, 14.57 percent opened and viewed the eblast; a much higher rate than the 9.8 percent industry average. Of those, more than 5.6 percent clicked-thru to links within the eblast, to find more information about Missouri travel. The tourism



Domestic Marketing

industry click-thru average is 4.6 percent.

In October 2009, MDT partnered with Jerry Henry and Associates to conduct a study testing the effectiveness of the email marketing campaign. The study showed 84 percent of respondents recalled receiving the targeted eblasts from the Missouri Division of Tourism.

More importantly, however, comparing those who did recall receiving email promotions versus those who did not recall the eblasts, 18.1 percent more of the 'did recall' consumers were likely to visit Missouri. This means the email marketing campaign potentially generated 3,292 more incremental household visits to Missouri in 2009 than would otherwise have visited. Those familiar with the email promotions stayed 7.8+ percent longer, did 9.6+ percent more, and spent 36.2+ percent more than those who did not recall receiving the eblasts.

MDT's \$164,400 investment in email targeted visitors yielded \$13.1 million; \$79.68 in visitor expenditures for every dollar invested. In addition to the positive ROI it provided, this campaign kept many travelers in Missouri. Nearly 78 percent spent the night; the average overnight traveler stayed in Missouri for 4.1 nights.



Tourism Partners

Civil War Sesquicentennial

In April 2010, Missouri Gov. Jay Nixon issued Executive Order 10-20 establishing the Missouri Civil War Sesquicentennial Commission. The purpose of the commission includes, but is not limited to: increasing awareness and understanding of Missouri’s role in the Civil War; promoting public awareness of the historical significance of Missouri in the Civil War; promoting cultural tourism in and around the state of Missouri in relation to the Civil War and its legacies. MDT Director Katie Steele Danner was named to this commission.

Missouri Division of Tourism provided staff support to design a strategic-planning process, develop a work plan and implement an ongoing systematic approach to operations and tracking. Staff provided communica-

tions to visitors and media through eblasts and news releases. The staff communicated with commissioners, state agencies and leadership to organize the structure for the work plan. MDT contributed a logo for branding, logo usage guidelines, website design with tourism functionality, Web content accrual plan, strategy with multiple planning documents, PowerPoint presentations, handouts, meeting facilitation, distribution lists, work contacts, and draft contracts.

In addition to working with the commission to structure and organize the initiative, MDT included Civil War advertising in its marketing mix for FY10, producing print ads that ran in several national publications: *America’s Civil War*; *American Heritage*; *Civil War Courier*; *Civil War Times*; *History Channel Magazine*; and *Smithsonian*. Telling the story of Missouri’s Civil War heritage and history begins with advertising, but leads potential visitors to the attractions, state parks, and events that will translate into tourism revenues.

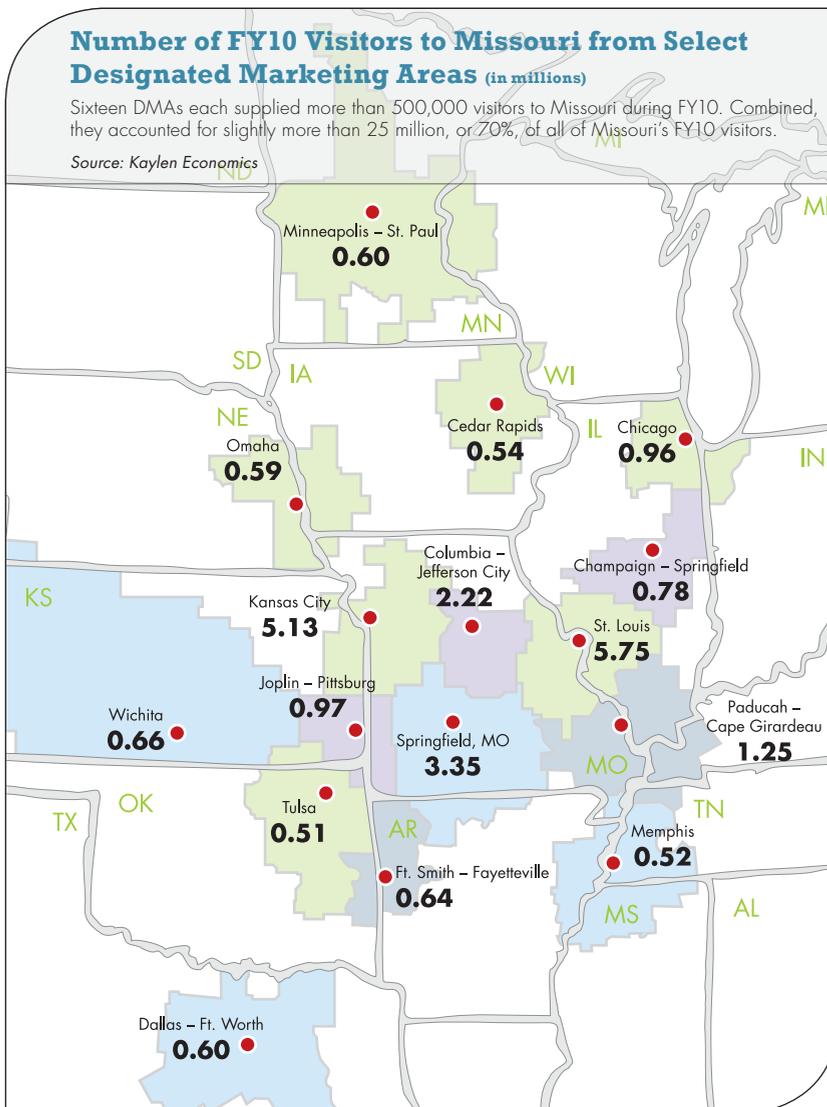
Search Engine Marketing

In FY10, MDT began optimizing search engine marketing through a partnership with Madden Media. Search engine marketing, or SEM, is a way to increase the traffic to websites by improving their appearance on search engine result pages. In other words, MDT and Madden are making sure that VisitMO.com and other industry websites are the first sites people see when they search on words such as “Missouri,” or other key words that apply to the tourism industry.

VisitMO.com SEM

The program started with MDT’s website, VisitMO.com in August 2009. Using Google Ad-Words, this pay-per-click campaign generated 401,197 clicks, resulting in 12,055,505 impressions. MDT’s click-through rate (CTR) increased from 2.35 percent in August 2009 to 5.89 percent in June 2010; an FY10 average of 3.33 percent.

The top performing campaigns were State Parks at 5.57 percent, and Events and Festivals at 5.11 percent.



Tourism Partners

Partner Performance

MDT then extended the partnership to 18 industry members, allowing them to participate in the program at a level they may not otherwise have been able to afford. Also, we were not out-bidding each other for many of the same words. Cumulatively, these partners received 255,517 clicks since the program began in September 2009. The campaigns averaged a CTR of 2.84 percent overall. Top performing DMOs were St. Joseph, Independence and Table Rock Lake.

All 18 of the partner campaigns continue to perform above what Google considers a quality CTR of 2 percent.

Tom Uhlenbrock

The Missouri Department of Natural Resources and MDT have collaborated with Tom Uhlenbrock, a well-known travel writer formerly with the *St. Louis Post Dispatch*, to amplify our Missouri message. Uhlenbrock has written several pieces for MDT. His diverse contributions includes: 10 state parks in 10 days; Dams; Five favorite springs; Mark Twain Forest; Missouri mining history; Ozark Trail; Route 66; Scenic drives; Show caves; Webcams; and Extreme sports.

Missouri's Fishing and Outdoor Tourism Spokesperson

Scott Pauley is known as one of the most successful tournament fisherman in the Midwest. Pauley's primary responsibility is to promote outdoor recreation by educating the public about Missouri's abundant resources. He represented the Division at three post season fishing tournament championships, gave numerous on-stage interviews teaching winning tactics, and was featured on both ESPN's Tournament Fishing Radio, and National Public Radio discussing opportuni-

ties, locations and access.

Pauley also assisted the Division with several outdoor news releases, sport and boat shows, attended events throughout the state where he distributed signed collector cards and promoted VisitMO.com, assisted United Kingdom tour operators with trout destination questions, and was featured duck hunting in Missouri Wildlife magazine.

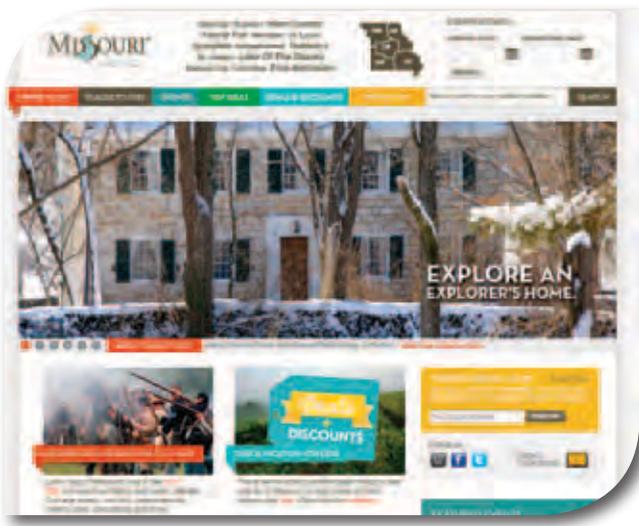


Communications Program

VisitMO.com

As our largest marketing tool, MDT is constantly striving to make VisitMO.com as complete and user-friendly as possible. MDT initiated several changes during FY10, including:

- Article display
- Upgrades to the events calendar and its search functions
- Upgraded tag search
- Upgraded keyword search
- Upgraded detail page on individual listings and events
- Refreshed and enhanced graphic elements



Additionally, several changes were made to MDT's Industry Portal, the administrative site our industry members use to submit and update their VisitMO.com listings. These enhancements included a new submissions home page; a major upgrade to the user interface for editing and enhancing listings; upgrades for the Travel Guide submission form; and a function that allows MDT staff to complete "data pulls" of information to be used in the Travel Guide. Work also began on a CVC/CVB data listing import, which will help enhance VisitMO.com by allowing a quick upload of listings from existing tourism-related websites.

Travelers have responded to these enhancements. The period July 2009 – June 2010, FY10, showed a 7.5 percent increase in VisitMO visits over the previous year (data gathered from Google Analytics), despite a 27 percent spending decrease in advertising aimed at driving people to VisitMO. During peak travel times,

VisitMO.com experienced increases of more than 200 percent, year over year.

Total website visits	918,403
Monthly average	76,534
Unique visits	813,824
Pages viewed	3,013,297
Average time on site	3:14 minutes
Average visits per day	2,516

Additionally, the following website projects contributed to increasing visitation to VisitMO.com, and raising consumer awareness of and engagement with the Missouri Tourism brand:

- PictureMissouri.com, a quarterly photo competition
- Mid-Season Call Up Micro-website, in coordination with 2009 All Star game promotions
- Updates to the Stay Close Micro-website (www.hlmediaworks.com/stayclose, compilation of all marketing materials for MDT)
- Maintenance updates to the Ideas Micro-website (www.visitmo.com/ideas, calendar offering themed trip ideas)
- Redesign of the Monitor email

Missouri Travel Guide

The 2011 Official Missouri Travel Guide features 172 pages of Missouri travel information, including listings of attractions, state parks and historic sites, hotels, wineries, bed and breakfast inns, campgrounds, outdoor destinations, golf courses and canoeing outfitters.



Social Media

In FY09, MDT dabbled in social media. As part of an integrated online marketing and public relations strategy, the new fiscal year focused more on this new media incorporating Twitter, Facebook and the VisitMOBistro Blog into a unified effort.

News releases and blogs are now fed onto the Facebook page to help distribute the message. Guest bloggers were recruited to allow more voices and expertise

Communications Program

to reach our audiences. Tweets are sent from multiple in-house Twitter accounts to notify followers when a new message is available for them to view, either through a release, blog or Facebook content.

Communication Numbers	
Ad Equivalency By Quarter:	
1st	\$60,995.60
2nd	\$245,467.16
3rd	\$687,761.41
4th	\$588,326.62
Total	\$1,582,550.79

Missouri Tourism News Bureau (http://News.VisitMO.com)	
New Registered Members	32
Independent Press Tours	6
Group Press Tours	1 with 5 writers
Video Production	3 Jefferson City Fall Festivals Oktoberfest
Media Requests and Pitches	110
News Releases	45

In addition, MDT staff completed three media mission trips this year to promote Missouri's assets to major publications. The trips were very successful and we have seen many results from these trips already. The following is a list of publications that were pitched.

Savour	Outdoor Life
Field and Stream	Parenting
Country Living	Girlfriend Getaways
Budget Travel	Golf magazine
Chicago Sun Times	Chicago Tribune
Man Tripping Blog	Midwest Living
Successful Farming	Traditional Home
Living the Country Life	

Public Service Announcements

In FY10, the Missouri Division of Tourism developed four public service announcements promoting the benefits of travel. The PSAs focused on how travel benefits health, relationships, childhood culture and education, as well as workplace satisfaction. The PSAs were delivered to 33 cable networks and 21 network TV stations within Missouri; and they were made available

to the tourism industry organizations throughout Missouri, to use in their individual marketing efforts.

Partnerships

The CenStates Chapter of the Society of American Travel Writers (SATW) held its annual conference in Kansas City in April 2010. Following the conference, MDT hosted five travel writers on a familiarization tour of Route 66 from Kansas City to St. Louis.

CenStates Chapter of the Society of American Travel Writers Route 66 Tour



Cooperative Marketing Program

The Division of Tourism (MDT), invests a substantial portion of its marketing budget in the advertising and promotional efforts of Missouri destinations through the Cooperative Marketing Program (co-op). Since 1995, the division has partnered with Missouri destination marketing organizations (DMOs) by providing up to a 50 percent reimbursement for high quality, performance-based advertising projects that meet the division's goals of increasing domestic tourism expenditures.



FY10 Highlights

FY10 Co-op Reaches More Than 1.8 Billion Potential Travelers

The outcome reporting phase, on the slightly less than \$4 million of reimbursements paid to Missouri DMOs for FY10 advertising and marketing projects, was completed Dec. 1, 2010. These outcomes are compiled and analyzed in the Program Summary Report, which will be available to view in early 2011 on the co-op section of www.Industry.VisitMO.com.

FY10 Program Statistics	
State \$\$ Reimbursed	\$3,926,966
Local Matching \$\$	\$3,961,294
Total Project Cost	\$7,888,260
Impressions	1,802,127,868
Responses to Advertising	916,344
% to Out-of-state audience	83%
TV Ads Placed	32,961
Radio Ads Placed	25,024
Newspaper Ads Placed	130
Magazine Ads Placed	533
Internet Ads Placed	74
Billboards Leased	8
Brochures Distributed	220,591
Tradeshows Attended	67
Other Marketing Activities	93
Number of Projects	47

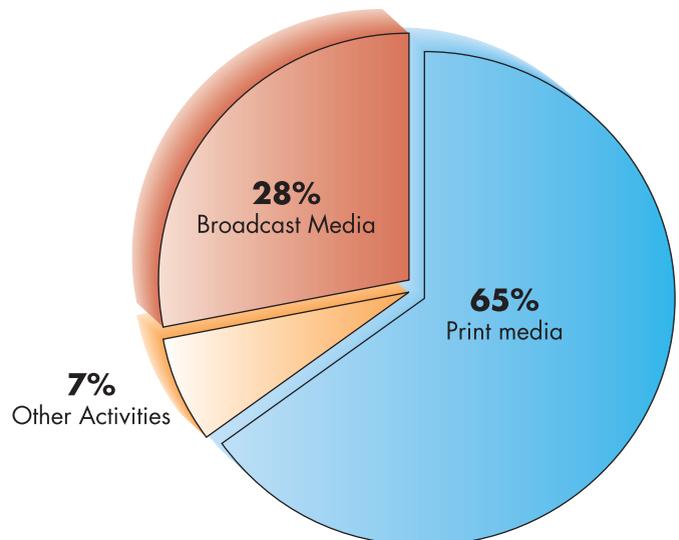
Advertising Totals For FY10 Program Approach \$7.9 Million

Media advertising comprised a healthy 93.4 percent of the total paid out in co-op reimbursements, as illustrated in the "Expenditures by Type" chart. Media advertising includes ads placed on TV, cable, radio, online and in magazines and newspapers.

Online Advertising Encouraged

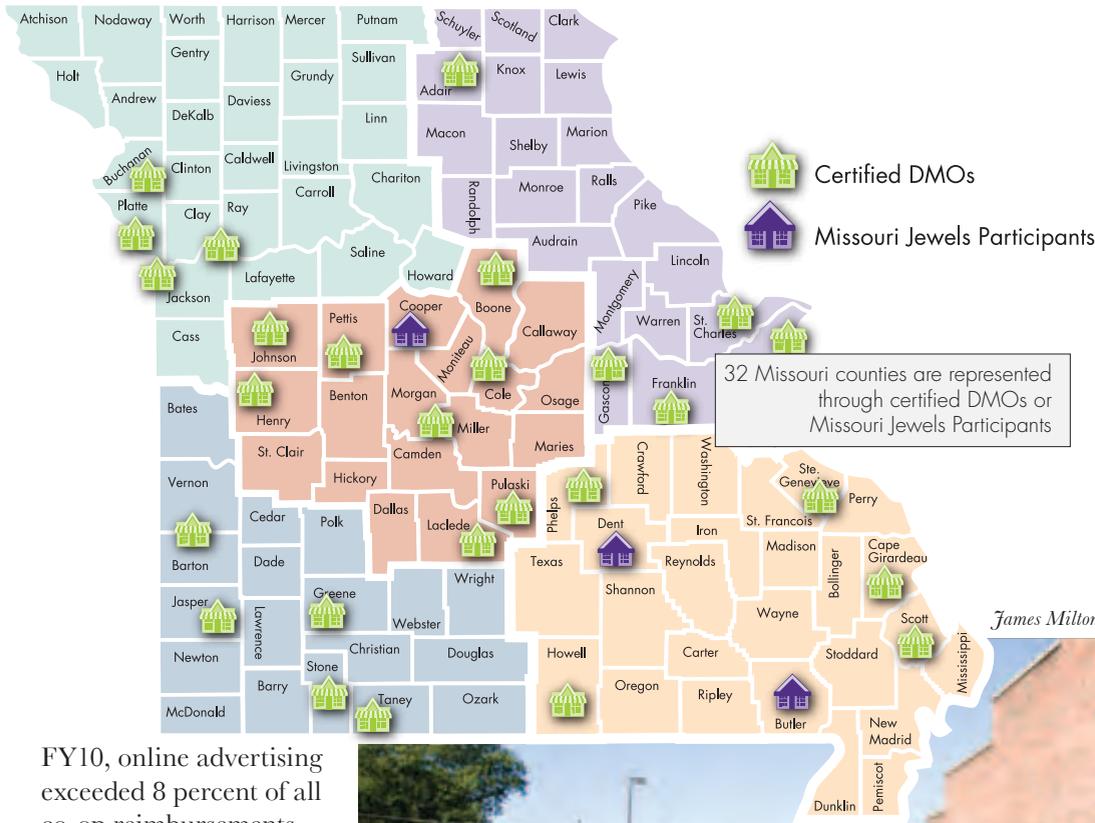
The marketing opportunities offered through MDT's co-op program continue to reflect the Division's increased online presence. The amount of online advertising (included in Broadcast Media), grows yearly. For

Expenditures by Type

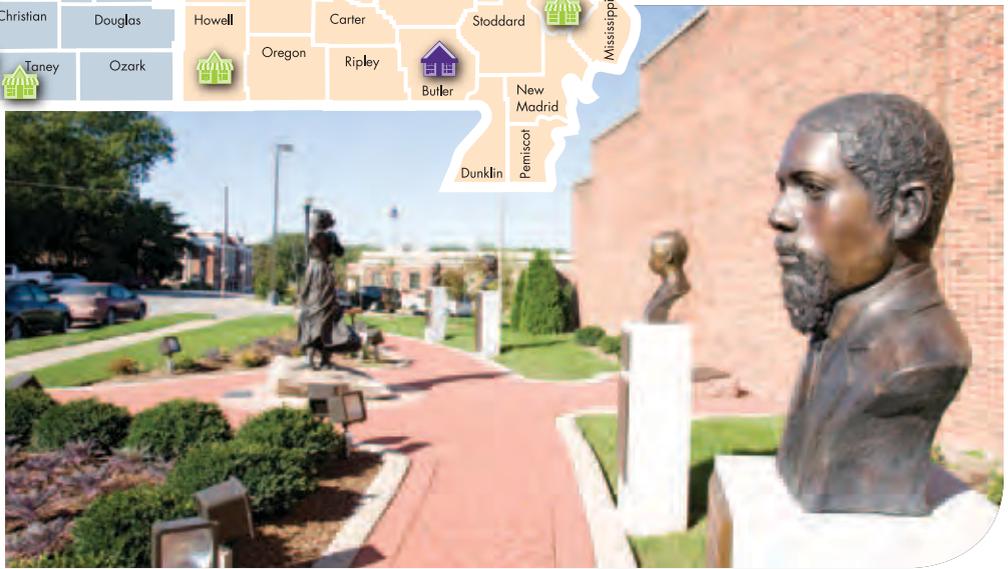


Cooperative Marketing Program

Cooperative Marketing Advertising and Marketing Projects



James Milton Turner, Heritage Park, Boonville



FY10, online advertising exceeded 8 percent of all co-op reimbursements.

\$3.1 Million In FY11 Co-op Projects Approved

Applications totaling more than \$4.04 million were submitted during this fiscal year. The list of all FY11 awards is posted on the co-op section of www.Industry.VisitMO.com.

MDT And The Co-op Advisory Committee Work To Insure High-Quality Projects

The Division of Tourism and the Cooperative Marketing Advisory Committee completed the annual strategic planning process. Notable recommended revisions were approved and added to the program guidelines which affect the FY12 RFP process. These revisions include a project modification process to encourage the use of cutting-edge advertising opportunities, and an expansion of eligible electronic and online tourism marketing activities.

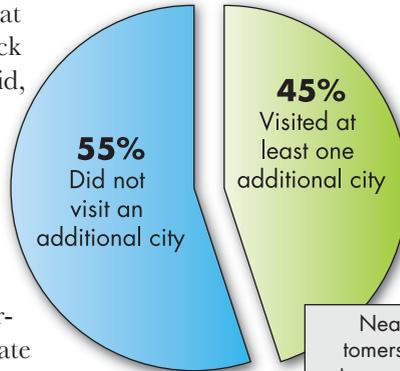
Co-Op Goes Green

During FY10, all informational and educational co-op workshops and seminars were moved from physical meetings to Web-based sessions. Additionally, 98 percent of all co-op communications are carried out electronically. Program participants have heartily embraced these changes, which have proven to save significant time and energy, without sacrificing quality.

Welcome Centers

In cooperation with the Missouri Department of Transportation (MoDOT), the Missouri Division of Tourism (MDT) operates seven Official Welcome Centers. These are located in highway rest areas at key entry points around the Missouri border: Rock Port, Eagleville, Hannibal, St. Louis, New Madrid, Joplin, and Kansas City. Welcome Center staff serves as the front-line sales team for Missouri tourism businesses and attractions. In total, Missouri's Official Welcome Centers served 555,609 travelers in FY10 (an increase of 68,685 or 12.4 percent from FY09); distributed 77,225 travel guides; and offered visitors (on average) 870 different brochures of tourism assets from across the state (number of brochures varies by location).

Additional Cities Visited as a Result of Welcome Center Visit

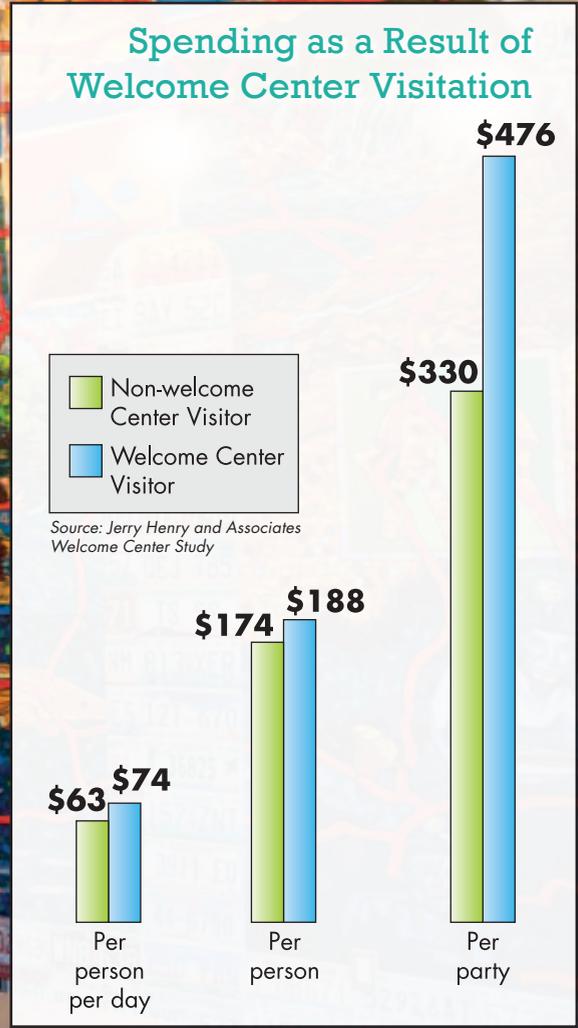


Nearly half of the Welcome Center customers visited at least one additional city or town within the state as a result of their stop at the Welcome Center.
 Source: Jerry Henry and Associates Welcome Center Study



Collage Mural – Joplin Welcome Center

Spending as a Result of Welcome Center Visitation



Source: Jerry Henry and Associates Welcome Center Study

Welcome Centers

Special Promotions

The Welcome Centers participated in three special promotions in FY10: Operation Orange; National Travel and Tourism Week; and Missouri Day.

Operation Orange, held in April, coincided with MoDOT’s promotion of Work Zone Awareness. The program included displays honoring fallen MoDOT workers, samples of work zone signage, construction cones, and a variety of orange-colored treats for travelers.

National Travel and Tourism Week, held the first full week in May, emphasizes the importance of travel. Welcome Centers’ participation ranged from washing travelers car windows to serving yummy treats – all to say “thank you” for traveling.

Missouri Day, the third Wednesday in October, honors and celebrates Missouri and its citizens. The centers welcomed visitors with Missouri-themed treats such as apples or Missouri-shaped cookies.

Affiliate Welcome Centers

The Affiliate Welcome Center program is designed to recognize CVBs, chambers of commerce and educa-

tional institutions that mimic the standards of the official Welcome Centers. A valuable asset as ambassadors, these centers have hours, information and facilities similar to the official Welcome Centers. As of the end of FY10, Missouri’s Affiliate Welcome Centers included: City of Pineville; Platte County CVB; Lebanon CVB; General John J. Pershing State Historic Site, Laclede; Springfield CVB; Pulaski County Tourism Bureau; and Ozark Heritage Welcome Center, West Plains.

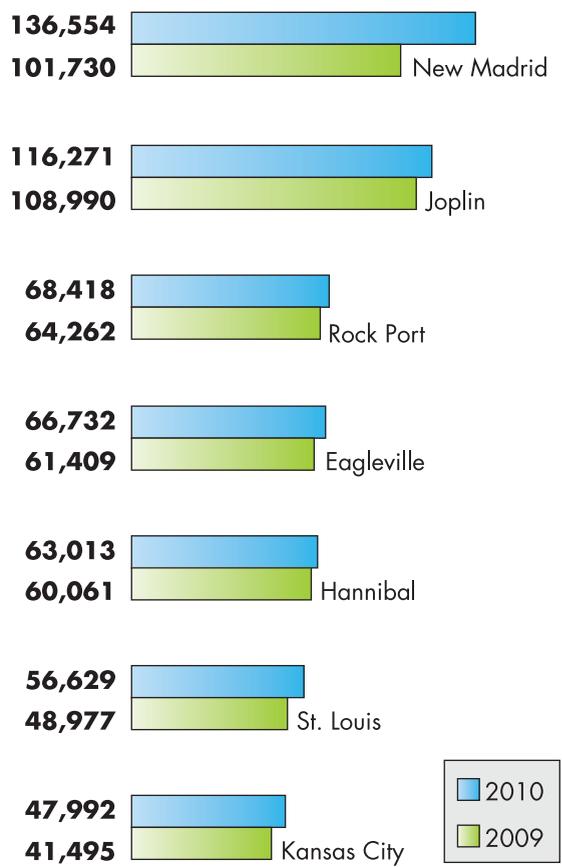
Community Involvement

Besides welcoming travelers, our Welcome Center personnel are involved in their communities. They attend tourism industry meetings; work closely with local chambers of commerce and CVBs; give presentations at schools, hospitals, social and business organizations; solicit input and listings for VisitMO.com and our Facebook page, from tourism-related businesses in their area.

New and Proposed Welcome Centers Themes	
Joplin	Showcase historical, recreational and industrial aspects of the SW region (Nov. 2007)
Eagleville	Prairie Passage (Feb. 2008)
Conway	Route 66 (May 2009)
New Madrid Center moving to Hayti	Wetlands (Spring 2011)
Marston*	Historical Development of the Bootheel – Native Culture, New Madrid Earthquake, western migration of US citizens, etc.
Rock Port*	Environmental Energy sources
Dearborn*	Westward movement trails – such as the Mormon and Oregon Trails
Lathrop*	Theme suggested would highlight the Lathrop region which was known as the Mule Capital of the World
Around Mile Marker 187* (between Mineola and Wright City)	Railroad industry and its role in transportation
Around Mile Marker 33* (outside of KC)	Cattle Trail theme
Perryville Area* (Mile Marker 129)	Highlight Kings Highway which runs from St. Louis to New Orleans in conjunction with the Great River Road
Charleston Area*	Highlights the steamboat and barge travel of the Mississippi River.
Route 71* (Future I-49) 2 themes proposed	Palm to Pines Highway or Ozark Natural Beauty

*Proposed themes completion dates to be determined

Visitor Counts by Center



Group Travel

Group Travel Overall

The group travel program of the Missouri Division of Tourism (MDT) promotes Missouri as a memorable destination for leisure travel groups. The goal is to increase the amount of Missouri opportunities offered by domestic group tour planners. This is accomplished using tradeshows, advertising and public relations to reach group marketers. Missouri is a leading group tour destination and many of our communities need the state's support to reach this niche segment.

Additionally, MDT representatives collect leads on group planners during international and domestic tradeshows, multi-person familiarization tours (FAMs), and industry promotions. These leads are distributed throughout the Missouri tourism industry. In FY10, 248 leads were circulated.

Domestic Group Travel Media

In addition to group FAMs, visits by individual members of the media are coordinated by MDT. In FY10, this included but was not limited to tour and travel print and online publications, travel writers/bloggers, tour operators and travel trade. MDT also works with various group tour publications to create special Missouri sections in a specific issue. Our goal is to provide exciting destination opportunities for the group travel operator to fill their buses while coming to Missouri. Such publications include Courier Magazine (National Tourism Association, circulation 6,000), Group Travel Leader Magazine (circulation 30,000); Leisure Group Travel Magazine (circulation 20,000) and BankTravel Management Magazine (circulation 4,100).

The goal is to **increase the amount of Missouri opportunities** offered by domestic group tour planners.



Showboat Branson Belle, Branson

Group Travel

Domestic Group Tour Associations And Conventions

National Tour Association (NTA) (www.NTAonline.com)

Tour operator members in NTA include student-specific operators, senior citizens, baby boomers, individual package operators, and international companies. NTA's annual convention offers individual appointments with member operators for group tour bookings.

American Bus Association (ABA) (www.Buses.org)

Representing approximately 1,000 motor coach companies, the American Bus Association is a leader in the group tour industry. The ABA convention includes one-on-one meetings with operators primarily from the U.S. and a growing number from Canada.

BankTravel (www.BankTravel.com)

BankTravel is the nation's leading organization of Bank Loyalty Program Directors. Nationally, BankTravel serves 3,000 banks and financial institutions and the travel industry members interested in reaching them. At the annual conference, bank club directors and the travel industry come together in individual sessions to build business relationships and cultivate prospective tour destination trips.

Missouri Travel Council (MTC) (www.MissouriTravel.com)

MTC is the umbrella organization and association of the tourism industry in Missouri. MTC provides its members economic, social and educational benefits through professional development, public advocacy and cooperative state and regional marketing efforts. MTC held two annual events aimed specifically at group travel organizers: 1) Missouri Showcase/Marketplace is a seven-day familiarization tour of Missouri for group leaders, travel agents and tour operators from across the country; it includes a Marketplace, where tourism entities meet with FAM participants during prearranged individual appointments. MDT is represented on the planning committee, and supplies one of the FAM-tour escorts. 2) Similarly, the Missouri Bank Travel Exchange brings bank loyalty travel club planners from Missouri, Kansas, Iowa, Illinois, Tennessee and Arkansas for prearranged appointments and networking with tourism industry members.

International Motor Coach Group (IMG) (www.IMGcoach.com)

IMG is an association of North American bus companies. The IMG conference brings tourism industry members together with tour operators for open appointments, networking and educational presentations. Industry members review tour operators' profiles to determine which operators they would like to meet.

Travel Alliance Partners (TAP) (www.TravelAlliancePartners.com)

Travel Alliance Partners is an organization of 38 tour operators in the U.S. and Canada. TAP is the leader in the "guaranteed departure" concept. Missouri is a TAP preferred partner; therefore, MDT represents Missouri at the annual, four-day, 'TAP Dance Conference,' which brings tour operators together with preferred, invitation-only tourism suppliers, for appointments, education and networking. In conjunction with the June 2010 conference, which was held in Branson, TAP, Grand Central USA and MDT coordinated and executed a FAM-tour for TAP's nine top producing group leaders.

Grand Central USA (www.GrandCentralUSA.com)

Grand Central USA is a partnership between Missouri, Arkansas, Oklahoma and Kansas for the purpose of creating fresh and unique regional itineraries and promotions. As of this printing, they offered 23 thematic, multi-state itineraries. The organization promotes these through special events held at the Missouri Bank Travel Exchange, TAP Dance, and Heritage Clubs International. (HCI markets destinations and attractions to the bank travel market.)

Student Youth Travel Association (SYTA) (www.SYTA.com)

SYTA is a not-for-profit, professional trade association that promotes student and youth travel. Their convention, designed to allow maximum networking for selected tourism suppliers, consists of scheduled appointments between tour operators and destination representatives.

All Things Musical

This is a professional trade organization that introduces suppliers to travel groups interested in music-based destinations. They are one of the few associations dedicated to music-themed, student trips. MDT provides a statewide resource for these groups when they are considering a music-tour. For FY 2010, this resulted in more than 50 leads for Missouri DMOs and attractions.



*PictureMO Winner,
Tracy Ewens, Meramec Springs
Trout Park, St. James*

GROUP TRAVEL EXPENDITURES

When combining day and overnight itineraries, each motorcoach trip to/through Missouri brings an estimated \$22,000 to the state per visit with an estimated \$6,200 spent per day.

Category of Expense	Tour Operator Expenditures	% of Total Tour Operator Expenditures	Tour Taker Expenditures	% of Total Tour Taker Expenditures
Admissions	\$18,636,500	32%	\$4,965,869	19%
Accommodations	\$16,844,126	29%	0	0
Meals	\$10,161,764	18%	\$8,703,734	34%
Itinerary packages	\$10,063,172	17%	\$457,808	2%
Shopping	0	0	\$10,147,175	40%
Coach Operations/ Charters /Ground Transportation	\$2,362,817	4%	\$592,457	2%
All other	0	0	\$856,369	3%
TOTAL	\$58,068,379	100%	\$25,723,412	100%

Source: Davidson-Peterson Associates Missouri Motorcoach Travel Study (Due to budget restrictions, updated data not available)

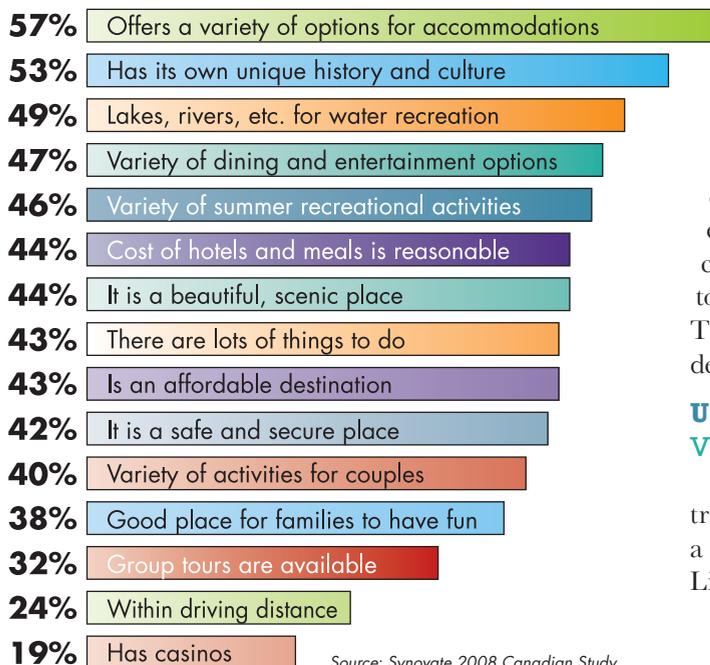
International Marketing

FY10 marked the conclusion of the Cellet Travel Services UK representation contract and the Access Marketing contract for in-country Canada. Because of Missouri's state budget issues, these contracts were not renewed for FY11.

International Media

Because of budget issues, organized group press trips were eliminated in favor of more targeted, individual media visits from the U.K., Canada and Germany. FY10 examples included, but were not limited to, visits from The Telegraph/UK (circulation 685,177), DreamScapes Magazine Canada (circulation 116,500), The Business Traveler UK (circulation 31,345), and The Travel Channel UK (estimated PR value on The Travel Channel segments: \$141,755). Also, Missouri coordinated a visit for Klaus Boog, in-country German Destination Awareness Manager for Kansas and Oklahoma. The visit, at no expense to Missouri, gave Boog a better idea of regional marketing and offerings. MDT assisted in coordinating a special Missouri section in both Canadian Traveller Magazine (the official publication of the Association of Canadian Travel Agencies; ACTA), and the America Yours To Discover (the official publication of the Discover America Canada organization, circulation 15,000 Canadian tour

Perceptions of Missouri Among Canadian Travelers



operators and travel agents). The organization provides information to Canadian consumers, travel agents and tour operators.

Overall International Trade Shows

U.S. Travel Association's International Pow Wow (www.PowWowOnline.com)

Pow Wow is the travel industry's international marketplace. It is the largest generator of U.S. international travel. In three days of intensive, prescheduled business appointments, U.S. travel organizations visit with approximately 1,500 buyers from more than 70 countries, negotiating business that generates more than \$3.5 billion in U.S. travel. Also, international journalists participate in appointments.

World Travel Market (WTM)

(www.WTMLondon.com)

This is a major event for world tourism. Held annually in London, WTM attracts media and travel industry members from around the globe; 48 percent of whom come from the U.K.

Canadian Efforts

For FY10, Missouri's Canadian in-country representative distributed news releases, conducted sales calls, and assisted in coordinating sales missions to tour operators, travel partners, media and journalists. Additionally, the office represented Missouri at the Travel Media Association of Canada, the Discover America Canada Association meetings, as well as tour operator destination training sessions and product launches.

Ontario Motor Coach Association (OMCA)

(www.OMCA.com)

One of the largest travel and tourism-related associations in Canada, OMCA brings Canadian tour operators and U.S. suppliers together. During OMCA's convention, Missouri hosts the Missouri Tour Operator Breakfast for operators and Missouri delegates. The breakfast provides a platform for Missouri tourism delegates to network with 83 Canadian travel buyers.

United Kingdom Efforts

Visit USA (www.VisitUSA.org.uk)

Visit USA hosts an annual "Roadshow" for U.K. travel agents, during which Missouri was promoted as a 'must-visit' destination to 297 participating agents in Liverpool, Kent and Belfast.

International Marketing

U.K. Summer Sales Mission

Each summer, MDT coordinates a sales mission to the U.K. that includes meetings with media and tour operators and destination training for U.K. tour operators and sales staff. MDT's contractors, Legacy Dimensions and Cellet Travel Services, participated in the mission, which included VIP events such as Visit USA Independence Day and Discover America Media Marketplace.

Bon Voyage

This organization holds a VIP consumer show in Southampton, showcasing Missouri as a holiday destination. The show was attended by approximately 650 guests who expressed an interest in travel to the U.S. Missouri's in-country representative, Cellet Travel Services, staffed the Missouri booth promoting Bon Voyage's featured tours to St. Louis,

MDT assists interested Missouri tourism industry with information on developing or expanding their group and international markets.

Branson, Hannibal, Independence, Kansas City, Missouri Route 66, and 14 "what to see and do" Missouri attractions. Bon Voyage is a tailor-made itinerary tour operator meaning they can customize a tour to meet any guest's needs.

Destination Shows

Times Destinations Travel Shows, one in London and one in Birmingham, are prestigious consumer events with attendance approaching 35,000. During these events, Wanderlust Magazine (readership: 50,000) was heavily promoted. This is the U.K.'s leading magazine for people with a passion for travel. In Wanderlust's February issue, a full page ad featured a destination competition. At both destination shows, the consumer

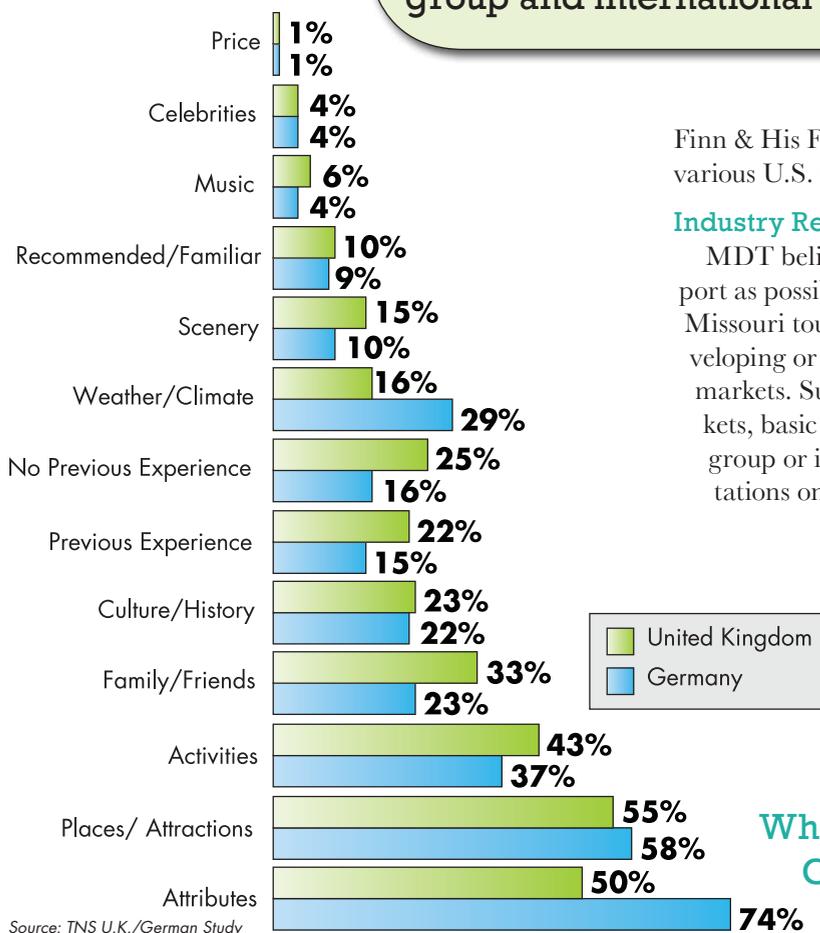
competition was held for Missouri. The competition offered one of three prizes: a Missouri trolley bag; a barbecue set; and a four-disk

DVD set of 'Huckleberry

Finn & His Friends.' The grand prize winner will visit various U.S. states in 2011, including Missouri.

Industry Relations

MDT believes in providing as much industry support as possible. To this end, MDT assists interested Missouri tourism industry with information on developing or expanding their group and international markets. Such assistance can be ideas on new markets, basic information for those embarking on the group or international markets or electronic presentations on agri-tourism or group tour development.



What Draws U.K. and German Visitors to U.S. Destinations

Calendar Year 2010

Regional/National Partnerships and Associations

U.S. Travel Association

This is a trade organization that represents the U.S. travel industry to the public and to policy makers in Washington, D.C. Internationally, it promotes U.S. travel and is considered an authoritative source of U.S. tourism research.

Travel and Tourism Research Association (TTRA)

TTRA is an international, professional organization with a 700+ membership that consists of industry professionals, academic educators and researchers in 39 countries. It promotes development of quality research programs in tourism organizations and academia and provides networking opportunities between tourism professionals.

Missouri Association of Convention and Visitor Bureaus (MACVB)

MACVB was established in 1992 to develop cooperative marketing, promotion and educational programs among convention and visitor bureaus throughout Missouri. It supports, promotes and develops sustainable economic growth of vacation and meeting/convention travel on behalf of its member bureaus and their respective communities.

Missouri Travel Council (MTC)

The Missouri Travel Council (MTC) is the private-sector umbrella organization of the Missouri tourism industry. Its primary aim is to provide economic, social and educational benefits to its broadly based membership.

Missouri Press Association (MPA)

The Missouri Press Association (MPA) of editors and publishers offers workshops, inter-paper advertising and an online index of member newspapers. It is an important partnership as MDT works with the group to promote tourism in Missouri.

Freedom's Frontier National Heritage Area (FFNHA)

The border war between Missouri and Kansas defines a geographic and cultural territory that received federal recognition in 2006 as the Freedom's Frontier National Heritage Area (FFNHA). This region's story tells, not only of the pre-war events leading to the Civil War, but also the role the region played in forging our views of freedom.

Mississippi River Country USA/Mississippi River Parkway Commission (MRPC)

MRPC has a mission to improve the quality of life for residents and visitors throughout the Mississippi River Valley and along the Great River Road. Members work to educate officials and the public about the 10 river states and Ontario.

Mississippi River Country (MRC) USA

An international marketing arm of MRPC, MRC is a regional organization that promotes the states bordering the Mississippi River to the Pacific Rim countries, with an emphasis on Japan. MRC produces a website, newsletters, news releases, special promotions, itineraries and a travel guide to entice international visitors to the region.

Missouri Rail Passenger Advisory Committee (MORPAC)

This committee was created to foster communication among the various cities in Missouri with passenger rail service to share ideas and best practices as to how best serve the rail travelling public at their rail stations.

River Heritage Association

This association offers Missouri tourism information resources to its members as well as peer networking within the travel industry of Southeast Missouri. Additionally, their website and other projects offer opportunities to promote the attractions in the River Heritage region.

Awards: Received and Presented

HSMIA Adrian Awards for Advertising

The Hospitality Sales and Marketing Association International (HSMIA) is the largest and most prestigious global travel marketing competition. For the 2010 campaign, MDT was awarded many Adrian Awards:

Three Gold awards for the VisitMO.com/ideas website, Stay Close advertising campaign, overall campaign and the Synched Web banners. Five Silver awards for Pack Up promotion, Fireworks Web banner, Pack-Up website, MidseasonCallUp.com website and the Lake ad two-page spread, and seven Bronze awards.

In January, 2011, MDT received for the first time one of the tourism industry's highest honors: A Platinum Adrian Award for the entire "Vacation for Less Campaign".

Google's Wisdom of the Crowd Award Nomination – MDT was a finalist for this award that was selected from the 2010 Gold HSMIA Adrian Award winners. The winner of this award received the top honors based on the collective wisdom of the traveling public and industry peers.

Ranly Publication Award

In 2010, the Missouri Division of Tourism took two honors at the annual Ranly Awards, which recognizes excellence in magazines, newsletters, websites, e-zines and e-letters, and is sponsored by the Missouri Association of Publications.

The awards went to Scott McCullough, honored for Best Website Homepage, for www.VisitMO.com; and Stephen Foutes, recognized for Best Entire Issue – Government and Public Services, for 2010 Missouri Travel Guide.

2010 Missouri Tourism Awards

(Presented at the annual Governor's Conference on Tourism)

Missouri Tourism Hall of Fame: Recognizes individuals whose long-term contributions have had a positive effect on the tourism industry as demonstrated by their commitment beyond personal gain.

Recipient: Kirk Hanson, director of public relations and marketing, Fantastic Caverns, Springfield

Spotlight Award: Spotlights an individual, business or organization not usually considered part of the tourism industry for noteworthy contributions "spotlighting" Missouri as a destination.

Recipient: The Hannibal Arts Council

Senator Emory Melton Legislative Award: Given to a legislator or tourism industry members who worked closely with the legislative process to promote the value of tourism in Missouri and to ensure the industry continues to flourish.

Recipient: Representative Maynard Wallace, District 143, Thornfield

Marketing Campaign Award: This award recognizes achievement in integrated marketing campaigns which led to increased visitation.

Recipient: Kansas City Convention and Visitors Association

Ambassador Award: Honors those who supported the promotional efforts of Missouri's attractions through involvement with MDT projects, providing publicity that helps travelers better enjoy their Missouri experience. Two award winners were named for 2010.

Recipients: Alan Carr, director of communications, Kansas City CVA; and Robert Schwartz, developer of the Art and Ambiance Trail and other art-related events in Osage Beach

Pathfinder Award: Presented to trailblazing marketers who successfully promote and build niche markets.

Recipient: Jeff Yielding, for promoting cycling in Hermann

Innovator Award: Pays tribute to a small tourism entity that achieved great results with a small budget.

Recipient: The Collins Pie Festival, Collins

Navigator Media Award: Honors a media entity for outstanding support and promotion of Missouri tourism through stories and images.

Recipient: "Daytrippin' Around the Lake," a publication covering the Lake of the Ozarks Area

Tourism's Legacy

1993

House Bill 188 – Creates a funding mechanism considered a national model for a dependable revenue source to fund the Division of Tourism's marketing efforts. This legislation set aside a percentage of tourism-generated tax revenue for further tourism promotion while requiring no tax increases.

Odyssey Award – from the Travel Industry Association of America for tourism Awareness due to Missouri Tourism industry support for the passage of HB 188

1995

MDT began the performance-based cooperative marketing funding program to afford MDT the opportunity to partner with certified, nonprofit destination marketing organizations on a dollar-for-dollar basis in the implementation of qualified performance-driven tourism marketing projects.

1998

Legislation passed to extend the life through 2004 of MDT's supplemental funding source and the percentage used by the Department of Revenue when computing each year's budget.

1999

National Council State Tourism Directors' (NCSTD) Marketing Award- Creativity Award for Marketing and Promotion in a Niche Market.

Chris Jennings, MDT Director elected National Council State Tourism Directors' (NCSTD) Chairman
NCSTD State Tourism Director of the Year- Chris Jennings, MDT Director

2000

Mercury Award for creativity in television advertising from the National Council State Tourism Directors' (NCSTD)

Missouri Tourism Hall of Fame awarded to Lt. Governor Roger Wilson
Senator Emory Melton Legislative Award presented to Joel Pottinger, Director, Lake of the Ozarks CVB

Re-elected National Council State Tourism Directors' Chairman- Chris Jennings, MDT Director

2001

FY94 base appropriation paid back- A provision in HB 188 stipulated that the original FY94 base appropriation was to be paid back to the state by 2004. MDT paid it off three years early.

Missouri Tourism Hall of Fame awarded to Gov. Mel Carnahan
Senator Emory Melton Legislative Award presented to Kirk Hansen, PR Director, Fantastic Caverns

2002

Odyssey Award from the Travel Industry Association of America for MDT's International advertising campaign

Missouri Tourism Hall of Fame awarded to Don Morrison, TWA
Senator Emory Melton Legislative Award presented to Senator Sidney Johnson

2003

HB 1620 extended the sunset clause of HB 188 through the year 2010

Missouri Tourism Hall of Fame awarded to Sam Allen, Former Tourism Director Lebanon Convention Visitor Center.
Senator Emory Melton Legislative Award presented to Rep. Ken Fiebelman

2004

Mercury Award for technical marketing from the National Council State Tourism Directors' (NCSTD)

Odyssey Award from the Travel Industry Association of America for MDT cultural advertising campaign

Missouri Tourism Hall of Fame presented to Senator Doyle Childers
Senator Emory Melton Legislative Award presented to Senator John Russell

2005

Missouri Tourism Hall of Fame awarded to Joel Pottinger, director, Lake of the Ozarks CVB

Senator Emory Melton Legislative Award presented to Lt. Governor Joe Maxwell

2006

Mercury Award for creativity in radio advertising from the National Council State Tourism Directors' (NCSTD)

Missouri Tourism Hall of Fame awarded to Marci Bennett, Executive Director, St. Joseph CVB and MACVB

Senator Emory Melton Legislative Award presented to Dale Amick, Legislative Consultant, Missouri Travel Council

2007

HB 205/SB 376- in their respective chambers extended the sunset clause to the year 2015

Missouri Tourism Hall of Fame awarded to former State Representative Herb Fallert

Senator Emory Melton Legislative Award presented to Chip Mason, Director of Government Relations, Herschend Family Entertainment

2008

Missouri Tourism Hall of Fame awarded to Pat Amick, Executive Director, Missouri Travel Council

Senator Emory Melton Legislative Award presented to Gary Figgins, Publisher, Show Me Missouri Magazine

Missouri Jewels Program-MDT introduced this program to assist emerging tourism destinations develop an effective and robust marketing program.

2009

Missouri Tourism Hall of Fame awarded to Gene and Eleanor Maggard, Owners, Akers Ferry Canoe Rental & Campgrounds

Senator Emory Melton Legislative Award presented to Senator John Griesheimer

J. Desmond Slattery International Professional Marketing Research Award presented by the Travel and Tourism Research Association (TTRA) for the Missouri Welcome Center Marketing Research Study

Elected to Mid-MO PRSA Board of Directors- Sarah Luebbert, MDT Communications Director

President Travel and Tourism Research Association (TTRA)- Dee Ann McKinney, MDT Strategic Planning and Research Director

2010

Missouri Tourism Hall of Fame awarded to Kirk Hansen, PR Director Fantastic Caverns

Senator Emory Melton Legislative Award presented to Representative Maynard Wallace

Chairman of the Board - Travel and Tourism Research Association (TTRA)- Dee Ann McKinney, MDT Strategic Planning and Research Director



A new Missouri Welcomes You sign



*Missouri State Capitol,
Winning PictureMO
photo by Christy Nowlin*



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