

Missouri

Division of Tourism

FY09

Annual

Report



Letter from the Governor

From clear and beautiful streams to its many lakes, hiking and biking trails and ample outdoor opportunities, Missouri truly is a wonderful destination for anyone, whether they're vacationing with family, meeting up with friends or going solo on the fishing trip they've always wanted to take.

Looking at the state's five vacation regions, it's clear to see each has a history and makeup that creates a unique experience for both in-state and out-of-state travelers. From the large metropolitan areas on the state's eastern and western borders, to the smaller communities where "mom and pop" shops still thrive, there truly is something for everyone in Missouri.

As we continue our efforts to make Missouri a leading tourist destination, we must look at our state's diverse and beautiful outdoor resources, which offer visitors the chance to experience distinctive settings. And perhaps there's no better place to find those distinctive settings than in Missouri's State Parks and Historic Sites.

Whether you're interested in natural formations, like those found at Johnson's Shut-Ins State Park or Graham Cave State Park, or the man-made attractions you'll see at the Bothwell Lodge or Sandy Creek Covered Bridge historic sites, Missouri's State Parks and Historic Sites are a worthy destination for any traveler who wants to connect with nature and our Show-Me State history.

In today's society, we're all too often more connected to computers, smart phones and iPods than we are to our family, friends and the wonderful opportunities that exist in this great state. Missouri gives visitors the chance

to unplug for a while and just enjoy the outdoors, whether that involves taking a stroll along the Katy Trail or a float trip down one of our scenic and crystal clear rivers.

Missouri is home to many attractions where families will find a variety of activities that encourage children to spend more time outdoors and to learn more about the precious environment in which we live. It's vitally important we teach our children to respect and preserve our natural resources, and Missouri has dozens of Conservation Centers – which offer special programs and exhibits aimed specifically at families – where we can do just that. The best part: Missouri vacations can fill a child's memory banks without breaking *the* bank.

In these challenging economic times, we acknowledge travelers are looking to get the best vacation experience they can with the precious dollars they spend. The Missouri Division of Tourism will continue its work to market our state as an affordable and family-friendly destination where our many wonderful attractions are always close to home but far from ordinary.

Sincerely,
Governor Jeremiah W. (Jay) Nixon



Governor Jeremiah W. (Jay) Nixon



Graham Cave State Park

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A Letter from the Director

Missouri has maintained its standing as an ideal destination for travelers, whether they seek pristine waters to fish or play in, the bright lights of the state's metropolitan areas, any of our diverse attractions and museums, an inspiring business retreat, or the serenity of a camp site at one of our beautiful campgrounds or state parks.

The 2009 Fiscal Year presented many challenges to the travel industry, and the nation as a whole, but Missouri has managed to fare better than many other states, including those that share her borders. Since the fourth quarter of 2008, leisure travel has experienced a major decline worldwide. Corporate travel is also down as a result of massive layoffs and economic contraction. There are significant declines in corporate and association meetings and group travel business. In CY09, according to Smith Travel Research, occupancy was down more than 13 percent in surrounding states as consumers put off their vacation plans and businesses eliminated travel budgets. And while Missouri's occupancy was down, the decline of 5.5 percent was much more palatable than rates in other areas of the country.

Though uncertainty persists, key travel indicators are showing signs of welcomed improvement as the economic recovery takes hold. Knowing this, we must be good stewards of the valuable state resources we have as we promote Missouri as an attractive destination for travelers. Our rich and diverse state provides us with many reasons to be optimistic about Missouri's status as a desirable place to find a vacation that's close to home and far from ordinary.

First, we must acknowledge our elected leadership for their efforts to retain funding for tourism-related efforts. Our leaders have to make many difficult budget choices, but they recognize how important tourism is to the state's economy and have done all they can to ensure the Missouri Division of Tourism has resources to continue its work in promoting the state as a tourist destination.

Second, we can look to our advertising campaign which encourages guests to "Stay Close" in their travels. We feel this is an important message to convey to both Missourians and out-of-state guests in our target

markets (the bulk of which are in contiguous states) who are looking for an affordable, family-friendly place to spend their precious vacation.

The Internet is another area where the Missouri Division of Tourism is expanding its reach, and we have invested in a new and improved

Web site, www.VisitMO.com. Studies indicate 83 percent of travel decisions (whether they are business or pleasure trips) are made using an Internet source. The newly designed Web site will ensure it has the most accurate and up-to-date information possible. And as personalizing the customer's experience becomes more important in conversion and retention, we are examining new projects designed to make www.VisitMO.com the premier source for Missouri travel information.

Finally, we want to acknowledge our valuable industry members and their ability to create attractive packages for visitors. Not only does the Missouri travel industry work together through projects in their own communities, they work collaboratively with the Missouri Division of Tourism through its Cooperative Marketing Program. Local matching funds are leveraged by the state, thereby helping many communities double their advertising dollars as they work to attract more visitors.

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

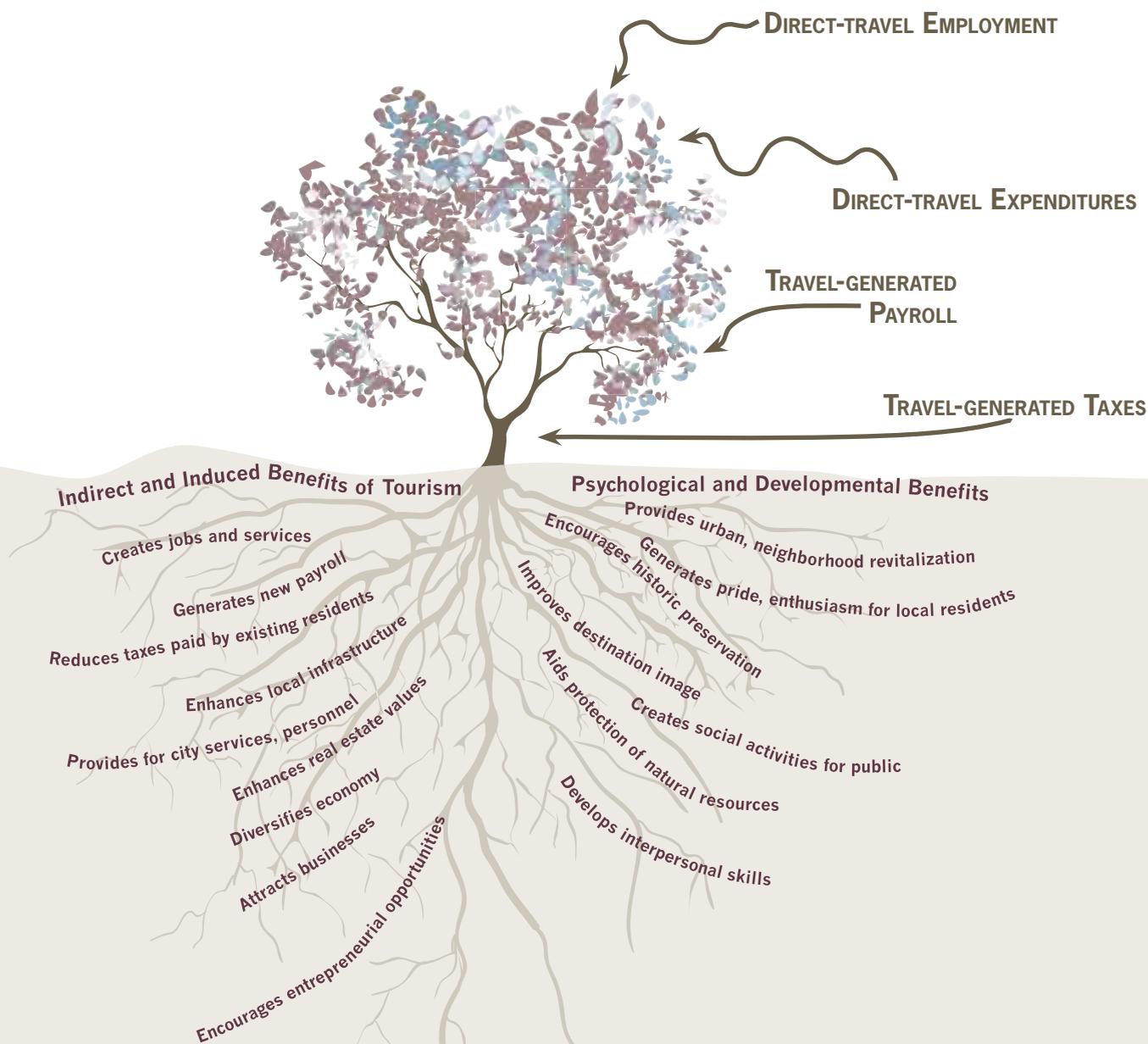
A handwritten signature in black ink that reads "Katie Steele Danner".

Director, Missouri Division of Tourism

Tourism – Deeply Rooted in the Missouri Economy

The Missouri travel industry is comprised of transportation, lodging, food services, entertainment and retail. Looking at the treetop level, Missouri travelers spent an estimated \$7.9 billion* in FY09. HOWEVER, when indirect and induced expenditures are added, the economic impact is \$12.3 billion!* It is when you look at the deep roots of tour-

ism that you grow to appreciate the genuine impact of tourism on our economy. The significant, combined benefits of investing in tourism weigh positively on our economy and culture. Some benefits that lie “just below the surface” easily convert to job creation which translates into more taxes paid, more money for infrastructure and a better economy.



List Source: US Travel Association.

*Source: TNS Travels America and University of Missouri

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; 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 the 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 MDT budget is contained within the Department of Economic Development’s annual budget submitted to the Governor and the General Assembly for their approval. Missouri’s tourism funding model is based on the tourism sector’s growth year over year. This funding formula provides another quantitative,

policy-backed way to report the impact tourism has on sales revenue in Missouri.

State Law RSMo 620.467, known as the Tourism Supplemental Revenue Fund (TSRF), tracks sales tax revenue generated by 17 tourism-related Standard Industry Classification (SIC) codes used as a barometer to determine the growth in the TSRF. The formula allows for 3 percent inflation each year. Once the 3 percent threshold is reached, one-half of the additional growth is used to determine the increase in funding. The funding in the formula cannot grow by more than \$3 million in any one year.

MDT employs a staff of 18 at the Jefferson City administrative offices and 45 tourist assistants in the Missouri Welcome Centers. On the international scene, MDT has contracted representation in the United Kingdom, Canada, and Germany.

MDT’s primary goal is to draw new and repeat visitors year-after-year thus increasing tourism expenditures in the state, which provides a meaningful impact to Missouri’s economy.

Missouri’s Five Marketing Regions



Listing of the 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

Missouri Tourism Commission and Budgets



MARCI BENNETT
Chairman
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



SHARON GARRETT
Purdy

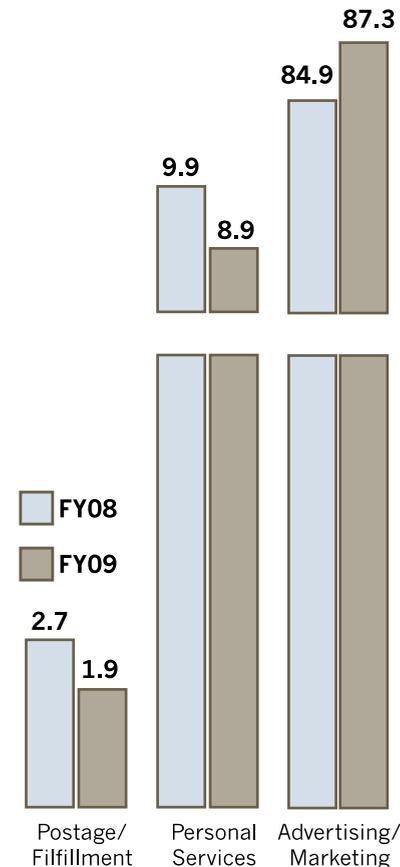
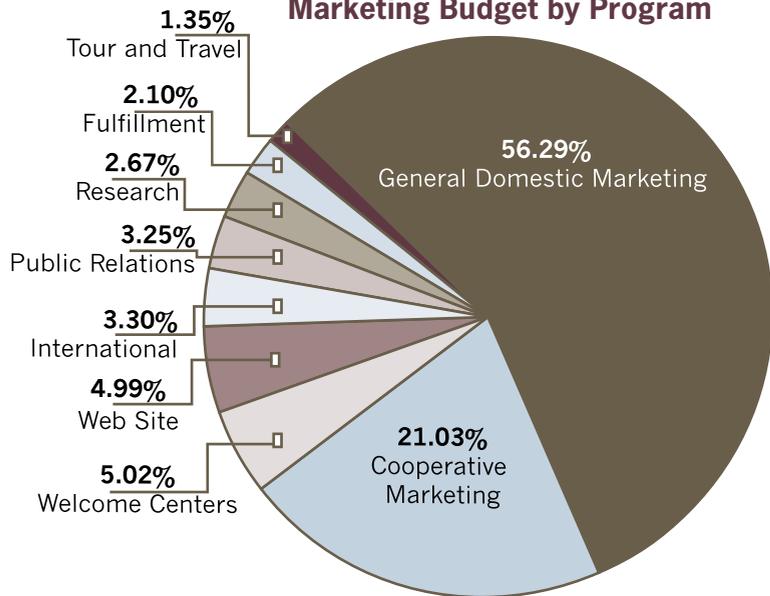


KELLY SWANSON
Kimberling City

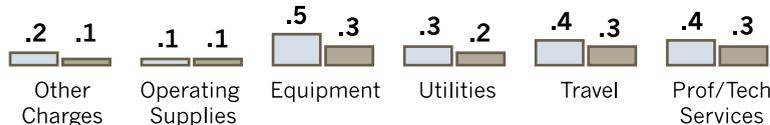


ERIC RHONE
St. Louis

Marketing Budget by Program

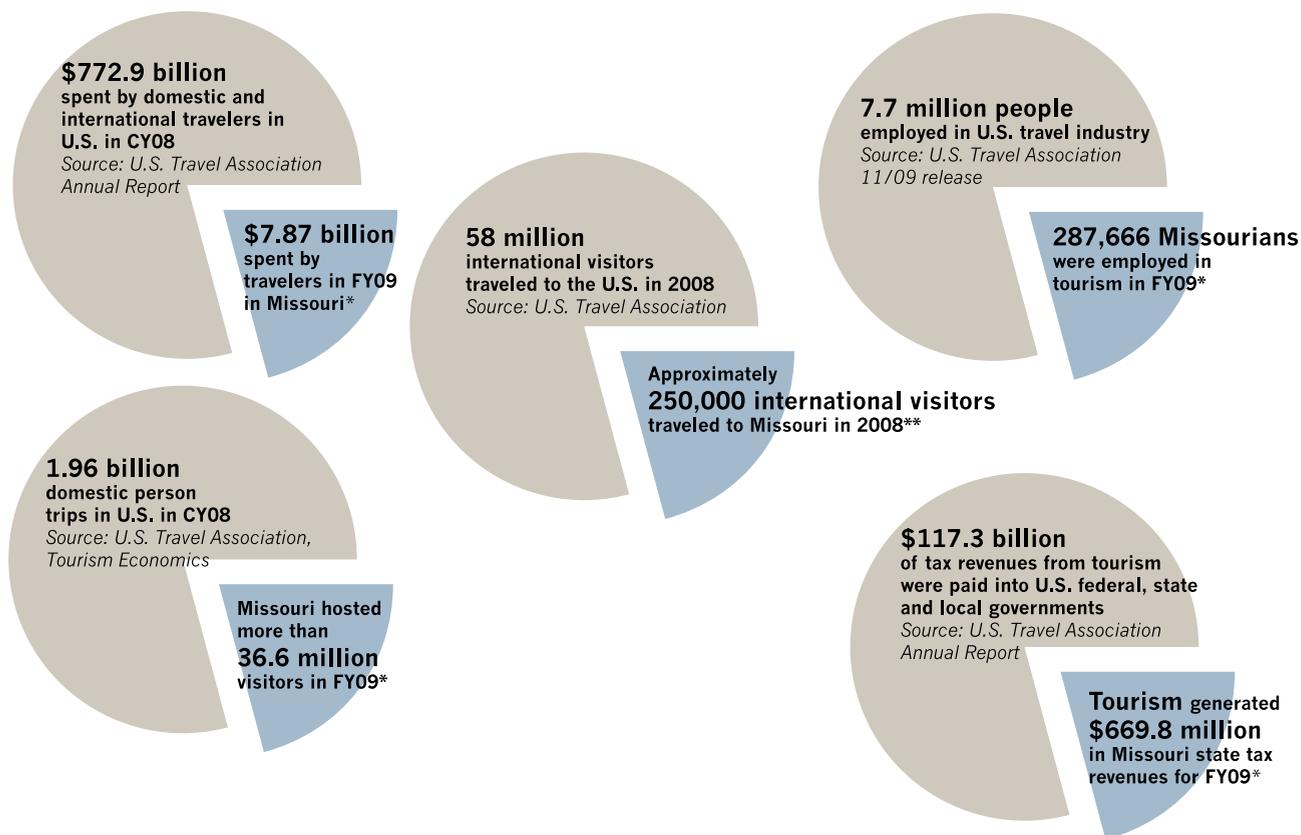


Percentages of Budget Expenditures



The Nationwide View of Tourism and Missouri's Top Numbers

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



MORE MISSOURI TOP TOURISM NUMBERS

1. Travel is a \$12.3 billion industry for the Show-Me State.*
2. The state of Missouri receives \$2.54 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, \$46.81 is returned in visitor expenditures. (Source: SMARI)
4. Travelers spent \$171.29 per person per trip during FY09.*
5. Missouri Welcome Centers generated \$12.8 million 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)
7. CY08 saw 29,998 person visits from the U.K. who spent \$551.37 per person per visit.**
8. 165,500 Canadians visited Missouri in CY08 and spent an average \$318.13 (US) per person per visit. (Source: Statistics Canada)

*Source: TNS Travels America and University of Missouri

**Estimates based upon aggregate Visa card usage data from VisaVue® Travel

Tourism Spending and Tourism-Related Employment

COUNTY NAME	FY09 Total Expenditures in 17 Tourism-Related SIC codes*	FY09 Tourism-Related Employment*
NORTHWEST REGION		
ANDREW COUNTY	\$18,158,439	250
ATCHISON COUNTY	\$10,904,350	220
BUCHANAN COUNTY	\$152,498,218	4,595
CALDWELL COUNTY	\$1,355,208	60
CARROLL COUNTY	\$5,603,272	146
CASS COUNTY	\$94,551,695	2,553
CHARITON COUNTY	\$2,672,640	80
CLAY COUNTY	\$336,846,850	12,380
CLINTON COUNTY	\$9,983,961	369
DAVISS COUNTY	\$3,970,643	90
DEKALB COUNTY	\$14,710,341	357
GENTRY COUNTY	\$1,503,529	94
GRUNDY COUNTY	\$7,550,342	227
HARRISON COUNTY	\$11,605,148	311
HOLT COUNTY	\$7,124,139	117
HOWARD COUNTY	\$4,081,755	308
JACKSON COUNTY	\$1,499,739,852	37,864
LAFAYETTE COUNTY	\$27,165,370	750
LINN COUNTY	\$8,196,125	345
LIVINGSTON COUNTY	\$16,854,516	479
MERCER COUNTY	\$1,108,210	27
NODAWAY COUNTY	\$22,601,911	792
PLATTE COUNTY	\$259,296,978	6,984
PUTNAM COUNTY	\$846,993	38
RAY COUNTY	\$10,027,470	349
SALINE COUNTY	\$18,125,883	774
SULLIVAN COUNTY	\$1,746,415	44
WORTH COUNTY	\$563,771	26
TOTAL NORTHWEST REGION	\$2,549,394,024	70,629

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

Weston Bend State Park



Tourism Spending and Tourism-Related Employment

COUNTY NAME	FY09 Total Expenditures in 17 Tourism-Related SIC codes*	FY09 Tourism-Related Employment*
NORTHEAST REGION		
ADAIR COUNTY	\$31,807,969	1,395
AUDRAIN COUNTY	\$16,818,906	556
CLARK COUNTY	\$2,146,797	92
FRANKLIN COUNTY	\$106,734,872	3,717
GASCONADE COUNTY	\$14,261,359	598
JEFFERSON COUNTY	\$192,732,181	5,858
KNOX COUNTY	\$920,622	69
LEWIS COUNTY	\$2,609,361	383
LINCOLN COUNTY	\$33,421,838	1,165
MACON COUNTY	\$16,236,608	457
MARION COUNTY	\$42,164,939	1,525
MONROE COUNTY	\$3,293,603	127
MONTGOMERY COUNTY	\$7,215,327	270
PIKE COUNTY	\$12,475,765	438
RALLS COUNTY	\$6,030,898	126
RANDOLPH COUNTY	\$22,472,316	796
SCHUYLER COUNTY	\$783,367	20
SCOTLAND COUNTY	\$2,225,124	74
SHELBY COUNTY	\$1,312,051	119
ST. CHARLES COUNTY	\$556,363,605	18,316
ST LOUIS CITY	\$1,100,151,697	24,873
ST. LOUIS COUNTY	\$2,112,229,411	61,887
WARREN COUNTY	\$23,957,703	719
TOTAL NORTHEAST REGION	\$4,308,366,319	123,580

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



Tourism Spending and Tourism-Related Employment

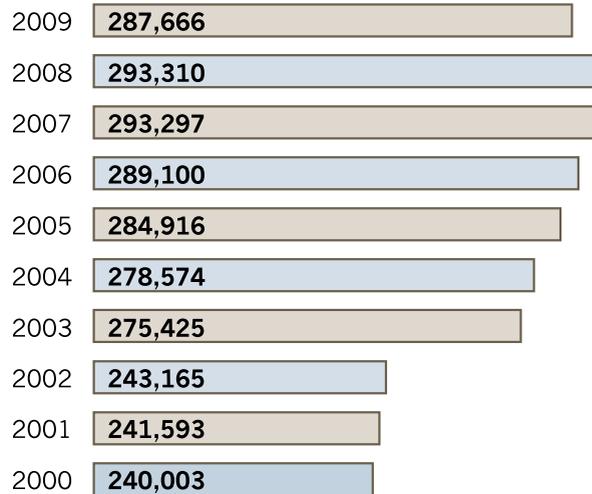
COUNTY NAME	FY09 Total Expenditures in 17 Tourism-Related SIC codes*	FY09 Tourism-Related Employment*
CENTRAL REGION		
BENTON COUNTY	\$13,025,247	364
BOONE COUNTY	\$302,259,565	9,557
CALLAWAY COUNTY	\$34,381,058	1,321
CAMDEN COUNTY	\$149,193,006	3,918
COLE COUNTY	\$121,136,087	3,830
COOPER COUNTY	\$15,234,333	965
DALLAS COUNTY	\$10,660,112	377
HENRY COUNTY	\$27,251,849	737
HICKORY COUNTY	\$3,724,085	134
JOHNSON COUNTY	\$50,193,739	1,883
LACLEDE COUNTY	\$44,179,937	1,205
MARIES COUNTY	\$3,016,970	80
MILLER COUNTY	\$29,314,585	725
MONITEAU COUNTY	\$7,695,483	348
MORGAN COUNTY	\$16,953,697	444
OSAGE COUNTY	\$4,130,681	175
PETTIS COUNTY	\$57,816,677	1,843
PULASKI COUNTY	\$59,943,568	2,639
ST. CLAIR COUNTY	\$3,116,928	50
TOTAL CENTRAL REGION	\$953,227,607	30,595

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



The Columns, University of Missouri, Columbia

Statewide Tourism Employment by Fiscal Year



*Source: Department of Labor, Division of Employment Security

Tourism Spending and Tourism-Related Employment

COUNTY NAME	FY09 Total Expenditures in 17 Tourism-Related SIC codes*	FY09 Tourism-Related Employment*
SOUTHWEST REGION		
BARRY COUNTY	\$33,849,383	951
BARTON COUNTY	\$9,336,769	453
BATES COUNTY	\$20,220,443	365
CEDAR COUNTY	\$9,593,863	338
CHRISTIAN COUNTY	\$62,290,628	2,019
DADE COUNTY	\$2,145,691	65
DOUGLAS COUNTY	\$7,687,647	234
GREENE COUNTY	\$534,337,353	15,642
JASPER COUNTY	\$162,724,901	5,000
LAWRENCE COUNTY	\$20,133,639	691
MCDONALD COUNTY	\$8,903,958	306
NEWTON COUNTY	\$81,649,698	1,877
OZARK COUNTY	\$5,924,312	208
POLK COUNTY	\$21,232,012	513
STONE COUNTY	\$131,983,297	2,194
TANEY COUNTY	\$435,870,396	10,460
VERNON COUNTY	\$15,125,377	493
WEBSTER COUNTY	\$21,603,833	644
WRIGHT COUNTY	\$10,699,710	322
TOTAL SOUTHWEST REGION	\$1,595,312,910	42,775

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

Dogwood Canyon Nature Park, Lampe



Tourism Spending and Tourism-Related Employment

COUNTY NAME	FY09 Total Expenditures in 17 Tourism-Related SIC codes*	FY09 Tourism-Related Employment*
SOUTHEAST REGION		
BOLLINGER COUNTY	\$3,607,055	121
BUTLER COUNTY	\$64,380,968	1,723
CAPE GIRARDEAU COUNTY	\$141,115,322	4,479
CARTER COUNTY	\$7,167,602	238
CRAWFORD COUNTY	\$25,698,090	654
DENT COUNTY	\$12,239,086	344
DUNKLIN COUNTY	\$26,308,183	656
HOWELL COUNTY	\$46,643,734	1,398
IRON COUNTY	\$5,644,421	212
MADISON COUNTY	\$7,153,870	242
MISSISSIPPI COUNTY	\$9,045,289	239
NEW MADRID COUNTY	\$21,166,976	372
OREGON COUNTY	\$5,134,864	190
PEMISCOT COUNTY	\$11,639,160	650
PERRY COUNTY	\$20,229,811	751
PHELPS COUNTY	\$61,898,142	2,045
REYNOLDS COUNTY	\$4,195,843	119
RIPLEY COUNTY	\$6,961,010	223
SCOTT COUNTY	\$43,576,420	1,268
SHANNON COUNTY	\$4,433,787	184
ST. FRANCOIS COUNTY	\$80,535,101	2,159
STE. GENEVIEVE COUNTY	\$12,017,437	394
STODDARD COUNTY	\$25,672,803	605
TEXAS COUNTY	\$12,198,013	359
WASHINGTON COUNTY	\$10,172,280	276
WAYNE COUNTY	\$7,718,469	186
TOTAL SOUTHEAST REGION	\$676,553,736	20,087
STATEWIDE GRAND TOTAL FY09	\$10,082,854,596	287,666

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

Annual Sales Taxes and Expenditures on 17 Tourism 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
2000	\$316,216,375	\$7,484,411,263	2005	\$362,368,106	\$8,576,759,915
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*	\$426,000,607	\$10,082,854,596

*2009 figures are a preliminary run. The Department of Revenue will not have the final figures until Sept. 1, 2010.

Research Projects ... WHAT WE LEARN

1. Economic Impact Report & Analysis

(All Missouri Travelers), (University of MO Economists)

This report provides the economic impact of the Missouri travel industry. Through data analysis and modeling, annual trending information is determined for visitor expenditures, demographics, and habits of the visitor.

2. Domestic Visitor Data Collection Survey

(TNS Travels America)

TNS Travels America is a cooperative project among state tourism offices that obtains consumer data needed each year for the economic impact report models. This data is critical for trending to determine the impact of marketing efforts. Knowledge gained: expenditures, purpose of visit, activities, destination, accommodations and demographics.

3. Advertising/Public Relations Effectiveness

(Strategic Marketing and Research Inc. – SMARI)

This study is MDT’s primary source for determining how campaigns impacted Missouri’s travelers in targeted markets. We learn if our advertising efforts are memorable and if the target market traveled. We also receive estimates of our annual ROI.

4. Database Maintenance and Profiling

(Ruf Strategic Solutions)

This provides MDT with a proprietary, customer intelligence marketing application for MDT’s database. It is the primary source for daily analysis of:

- i) Inquiry activity by geography.
- ii) Inquiry activity by medium.
- iii) Response analysis of advertising placements.

5. Travel Research Lodging Reports

(Smith Travel Research – STR Global)

This is MDT’s only source of monthly, STATE-WIDE occupancy data. Knowledge includes: state-wide data, numbers by state region and information on lodging occupancy, lodging revenue and revenue per available room (RevPAR.)

6. Web site Study-Visitor Profile of our Web site Users

(Texas A&M)

This study shows how VisitMO.com compares to other sites. It evaluates its effectiveness and details who visits the site. We learn which visitors have later visited Missouri and what influence VisitMO.com had on them. Information on those who visited is compared with that of those who did not visit. Functionality is evaluated.

7. VisaVue

(Visa International)

The VisaVue Project is a collaborative effort between numerous states and U.S. destination marketing organizations (DMOs). Visa is providing aggregated data on Visa cards issued in foreign

Missouri Hotel Performance by Region, FY09

Area	Occupancy		Average Daily Rate		Revenue Per Available Room (RevPAR)	
	Percent	% Change	Amount	% Change	Amount	% Change
Missouri Statewide	53.0	-4.8	\$78.59	-0.5	\$41.89	-5.2
Missouri North	53.7	-6.5	\$65.89	2.0	\$35.51	-4.6
Missouri South	48.6	-1.0	\$70.28	1.9	\$34.45	0.8
Columbia/ Jefferson City	49.6	-9.6	\$70.61	1.2	\$35.14	-8.5
Missouri North Area	57.2	-4.0	\$62.44	2.9	\$35.81	-1.2
Springfield, MO MSA	53.0	-4.5	\$68.33	2.7	\$36.30	-2.0
Missouri South Central	49.9	2.4	\$72.16	2.4	\$36.32	5.0
Branson	42.4	4.4	\$75.60	0.0	\$32.53	3.4
Missouri South Area	55.6	-2.4	\$62.06	2.3	\$34.63	-0.1
Kansas City	56.3	-5.0	\$85.25	-2.3	\$48.28	-7.0
St. Louis	55.8	-7.0	\$87.63	-1.3	\$49.35	-8.1

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

Research Projects

countries. The data includes information on what countries international visitors are from, plus provides expenditure details.

8. Customer Satisfaction

(Jerry Henry and Associates)

The MDT staff periodically analyzes MDT projects and products. In FY09, the Governor's Conference on Tourism was the only customer satisfaction study completed. Earning high marks across the board and improving significantly from the prior year, the conference generated an appeal rating of 4.38 on a five-point scale. The highest rated aspects of the conference overall included the organization of the conference (4.44), ability to network (4.43) and relevance of the topics (4.41).

9. U.S. Travel Association sponsored studies

(Formerly TIA)

MDT took advantage of group rates together with other destinations to study the Hispanic/Latino market. The research focused on:

- What motivates travelers to choose a destination;
- Preferred leisure travel activities and lodging;
- Methods of trip planning to U.S. destinations.

10. Advertising & Concept Testing

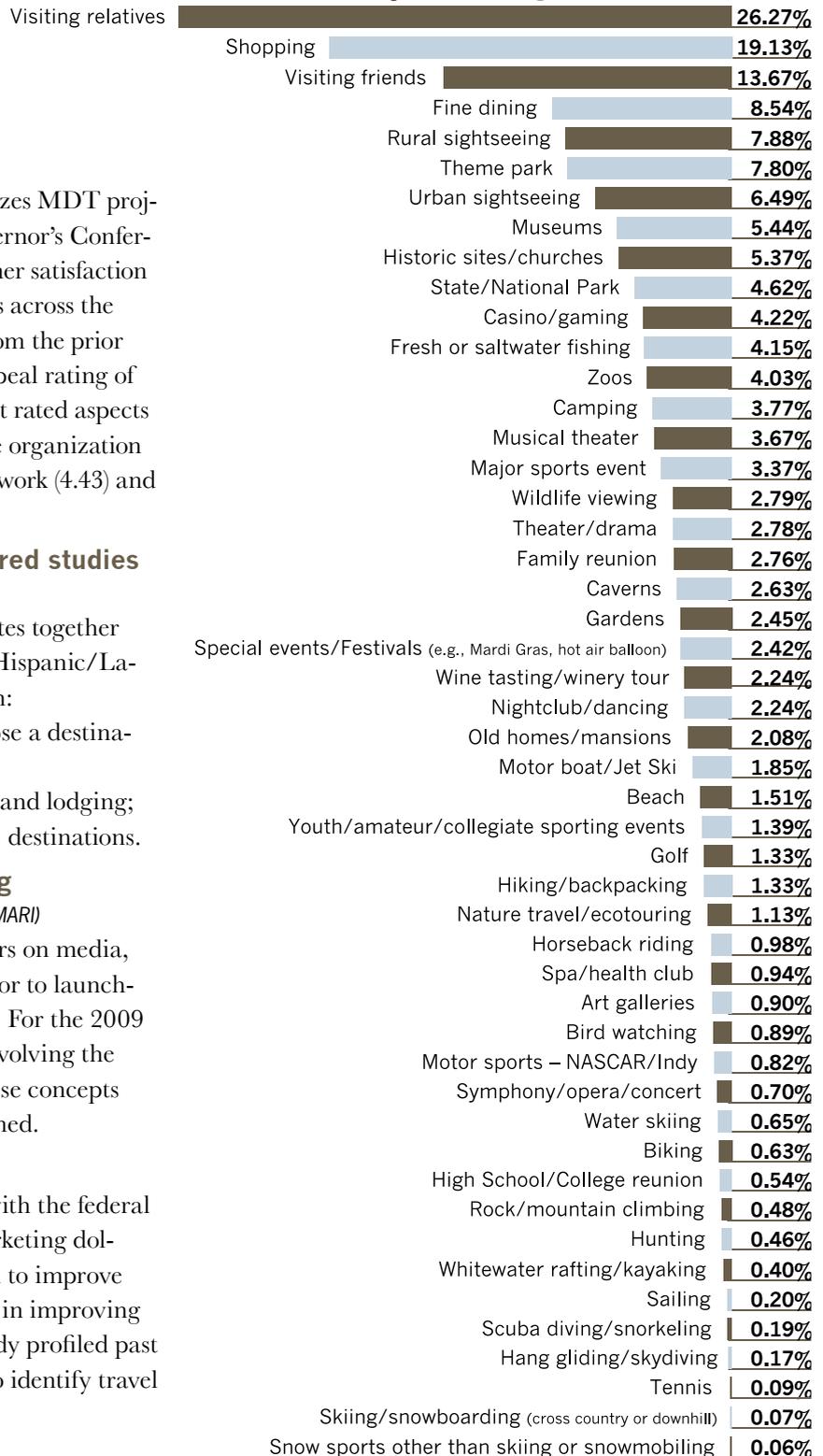
(Strategic Marketing and Research, Inc. –SMARI)

When spending millions of dollars on media, testing new advertising creative prior to launching a campaign is savvy marketing. For the 2009 campaign, concepts were created evolving the 2008 campaign to a new level. These concepts were tested and acceptance confirmed.

11. U.K./Germany Study (TNS)

This study was perfectly timed with the federal government's plans to increase marketing dollars in the U.K. and Germany, and to improve international travel issues. Utilized in improving Missouri's U.K. marketing, the study profiled past and potential visitors to Missouri to identify travel habits and trip spending.

Domestic Visitors' Activities by Percentage



Domestic Marketing

ADVERTISING MEDIUMS

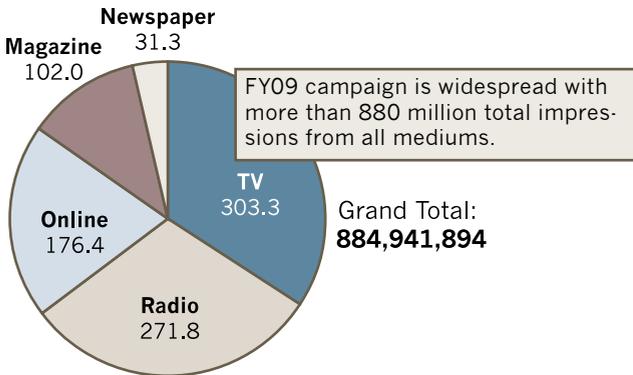
The Missouri Division of Tourism (MDT) manages creative and media strategy through the agency of record, Hoffman|Lewis (H|L). A balanced mix of brand image and tactical campaigns are utilized. Primary advertising mediums include:

- Television
- Radio
- Magazines
- Online search engine optimization
- Banner ads
- E-mail marketing messages

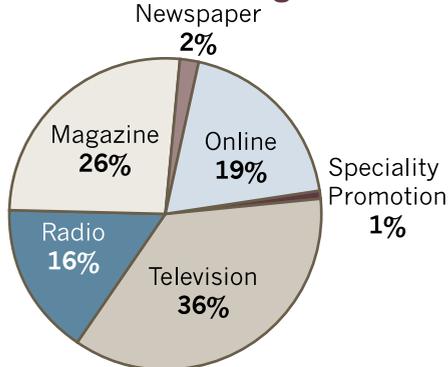
Target Audiences:

- Girlfriend Getaways
- Families
- Boomers/Couples
- Urban
- Civil War

Impressions by Medium in thousands



Domestic Marketing Investment by Medium



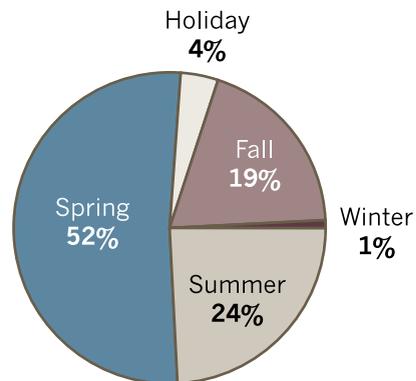
In FY09, MDT shifted from a concentrated spring schedule to a continuity plan with increased activity in the summer and fall months in addition to spring. Further, the strategy addressed the shorter consumer travel-planning cycles.

WINE COUNTRY AND TAILGATING PROMOTIONS-FALL 2008

In order to motivate in-state travel, MDT launched a tactical fall promotion campaign to increase traffic to VisitMO.com. Radio spots and Web banners directed consumers to a microsite for a chance to win a fall getaway. The promotion included four Wine Country/B&B package give-a-ways and four Rams and Chiefs games.

Round 1 Results	Round 2 Results
Wine Country and B&B	Tailgating
E-blast sent to 49,270 e-mail addresses	E-blast sent to 49,040 e-mail addresses
8.2% entered the contest	5.8% entered the contest
3,973 recipients referred by the Web banner	2,018 recipients referred by the Web banner
Total 8,218 registered to enter the promotion	Total 4,066 registered to enter the promotion

Domestic Marketing Advertising Budget by Season



Domestic Marketing

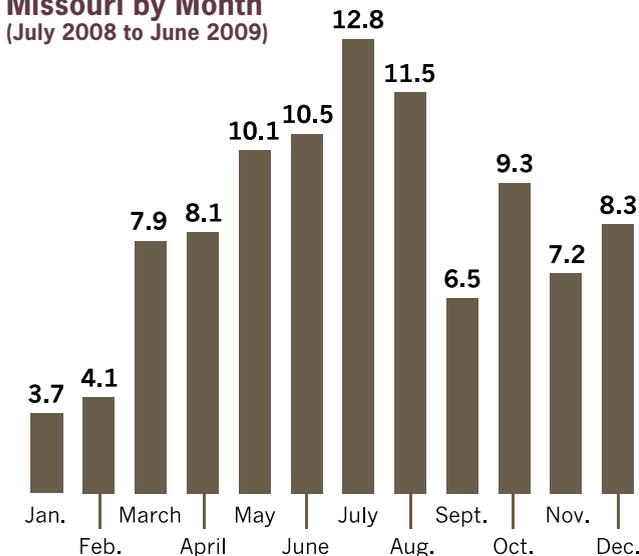
CONSUMER RELATIONSHIP MARKETING/E-MAIL BLAST MARKETING PROGRAM

Beginning in the fall of 2008, MDT began a relationship-marketing program targeting prospective visitors who indicated a desire to receive Missouri travel information related to 25 specific trip interests. Results for this cost-effective program have been outstanding.

E-Blast Campaign Results	
Measurement	Results
Impressions served	849,000 +
Click-through rate	5.2% (Industry Average 4.6%)
View rate	15.3% (Industry Average 9.8%)
Visited Missouri	81.7%
Those receiving E-Blast	7.8% Stayed Longer 9.6% Did more 36.2% Spent more
Per party spending	\$852
Incremental, direct visitor spending	\$2.8 million

Source: Jerry Henry & Associates Study

FY09 Percent of Visitation to Missouri by Month (July 2008 to June 2009)



Source: TNS Travels America and University of Missouri

E-mail Newsletter Blasts

LET FREEDOM RING MISSOURI'S INDEPENDENCE DAY CELEBRATIONS

There's no holiday more quintessentially American than the Fourth of July—and there's no better place to celebrate our nation's freedom than in Missouri. From the main bluffs of Hannibal to the lively streets of Jefferson City, Independence Day festivities attract Americans from all walks of life. Many Missouri towns have made significant contributions to the American Dream, and July 4th is the perfect day to reflect upon that fact. Add in your family-friendly events and (of course) some fantastic fireworks displays, and you have all the makings of Independence Day in Missouri.

AMERICA'S PAST COMES TO LIFE IN HANNOBAL

Experience a slice of the Revolutionary War in Hannibal, Missouri, with a special presentation of the American Revolution. The presentation features a reenactment of the Battle of the Clouds, the capture of the town, and the burning of the town. The presentation is held at the Hannibal Historic Site, 1000 N. 1st St., Hannibal, MO 63450. Tickets are \$10.00. Call 660-242-1234 for more information.

CELEBRATE FREEDOM ON THE RIVERFRONT

Join the fun and celebrate the 177th anniversary of Missouri's independence on the Riverfront. The celebration features a parade, fireworks, and a concert. The parade starts at 10:00 a.m. and ends at 1:00 p.m. The fireworks are set off at 8:00 p.m. The concert starts at 7:00 p.m. and ends at 10:00 p.m. The celebration is held at the Riverfront, 1000 N. 1st St., St. Louis, MO 63102. Tickets are \$10.00. Call 631-222-1234 for more information.

JOHN W. JEFFERSON CITY'S CAPITAL CELEBRATION

Jefferson City celebrates the 177th anniversary of Missouri's independence with a special celebration. The celebration features a parade, fireworks, and a concert. The parade starts at 10:00 a.m. and ends at 1:00 p.m. The fireworks are set off at 8:00 p.m. The concert starts at 7:00 p.m. and ends at 10:00 p.m. The celebration is held at the Riverfront, 1000 N. 1st St., St. Louis, MO 63102. Tickets are \$10.00. Call 631-222-1234 for more information.

FIRED UP FOR THE FOURTH

Looking for a fireworks display that's right on the "in-town" scene? Check out the following events:

- St. Louis: July 3-4
- St. Louis: July 4
- Danville: July 4
- Springfield: July 4
- Table Rock: July 4
- Sedalia: July 4
- St. Charles: July 4

To view all Newsletter Blasts, go to HLmediaworks.com/StayClose

Domestic Marketing

MAJOR LEAGUE BASEBALL ALL-STAR GAME PROMOTION

The Missouri Division of Tourism partnered with Major League Baseball (MLB) to draw both Web site visitation and encourage visitors to extend their stay at the July All-Star Game in St. Louis. Eleven minor league ballparks in key market states were targeted.

Baseball marketing efforts included	Marketing results included
E-mail promotion sent to 98,862	25 winners of the All-Star Summer Prize package
12.4% viewed	Total photos viewed: 128,560
More than 10,000 premium items distributed	Number of pages viewed per Web site visitor: 7.4
Scouted more than 147,000 baseball fans	Time spent per Web site visitor: 03:17 minutes

MIDWEST LIVING MAGAZINE – COVER WRAP

MDT worked with *Midwest Living* magazine this year on a first-time concept: a magazine cover wrap. The marketing objective was to motivate summer travelers to increase length of stay in Missouri resulting in increased state tourism revenue.

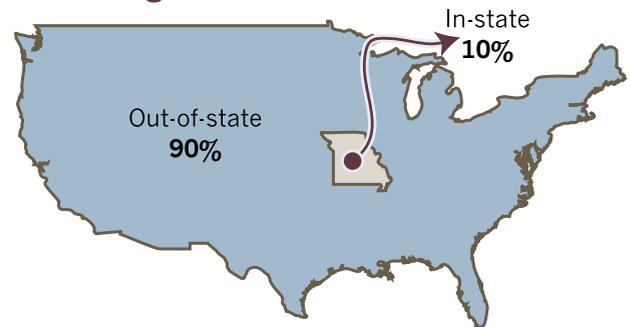
To meet objectives, the wrap was to provide Missouri trip ideas, via removable stickers on the inside back cover that could be placed on calendars. The idea was further carried out by encouraging visitors to go to VisitMO.com to get additional ideas to ‘stick’ on their calendars.

Midwest Living Cover Wrap	
Target Audience	Women (35-54) – Boomers and Families
Geographic Audience	AR, IA, IL, IN, KS, KY, MO, OK, NE and TN
Increased Awareness During that Timeframe	51.9% (in 2008) to 64.8% (in 2009)
Unique Visitors (May-August)	19,339

CIVIL WAR

MDT is working with various groups and communities to commemorate the upcoming sesquicentennial of the Civil War in 2011. A Missouri Civil War brochure was produced to promote locations that are open to the public. Additionally, MDT provided ad and public relations efforts to market events and sites.

In-state and Out-of-state Advertising Investment



VIDEO PROMOTION

MDT partnered with Wide Awake Films to produce 21 vignettes available on the Missouri Tourism YouTube Channel. Wide Awake also produced seven videos for each of the Welcome Centers. The videos feature Civil War stories, history and day-trip sites.

MISSOURI STATE FAIR

The Missouri State Fair offers a great opportunity to market our state at a fun and affordable event for both Missouri families and out-of-state visitors. Attendance at the Missouri State Fair increased 8 percent from the previous year with almost 337,000 people attending the 11-day event. MDT hosts an information booth at the fair where Travel Guides are available. Annually, cities are invited to “share a day at the Fair,” in an effort that allows those destinations the opportunity to hand out information specific to their region.

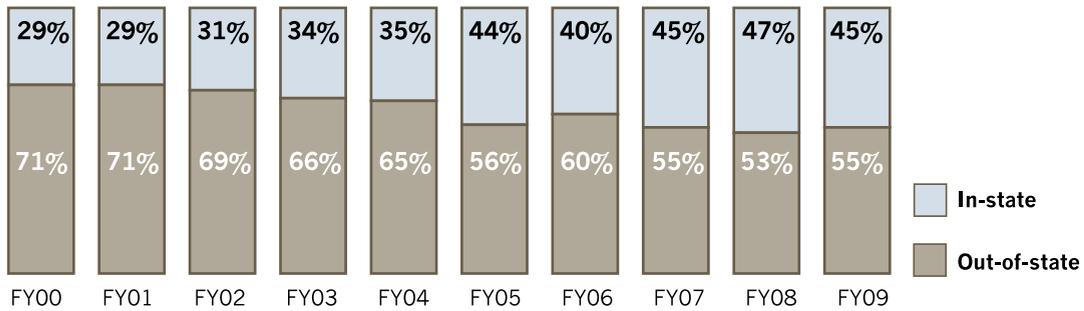


Civil War Print Ad

Missouri State Fair, Sedalia



In-state vs. Out-of-state Visitors (Residence status of Missouri travelers)



Source: TNS Travels America and University of Missouri

Domestic Marketing: Boomers/Couples/Families



Boomers/Couples Print Ad



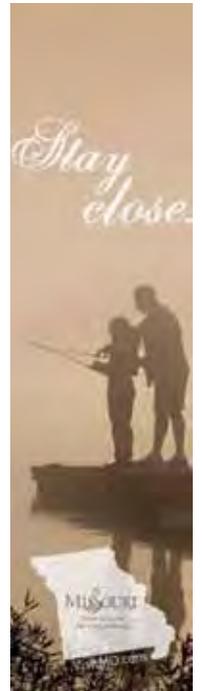
Boomers/Couples TV Ad



Boomers/Couples Online



Families Print Ad



Families Online



Source: TNS and University of Missouri



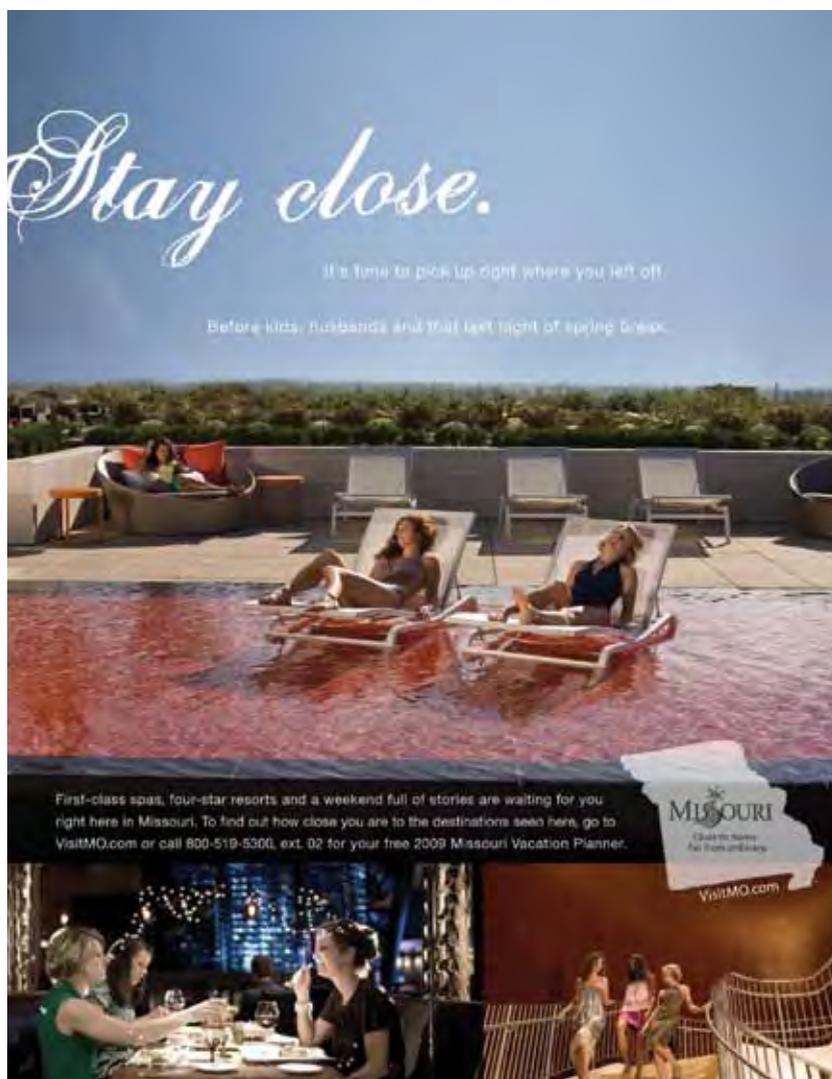
Families TV Ad

Domestic Marketing: Girlfriends Getaways



To view all MDT advertising, go to HLmediaworks.com/StayClose

Girlfriends Getaway TV Ad



Girlfriends Getaway Print Ad



Girlfriends Getaway Online



Girlfriends Getaway Online

Cooperative Marketing Program

The Missouri Division of Tourism (MDT) invests a significant portion of its budget each year in the Cooperative Marketing Program. This program is administered through a structured bid process and has partnered with Missouri destination marketing organizations (DMOs) since 1995. Co-op provides up to 50 percent reimbursement for high-quality, performance-based advertising and promotional projects designed to meet MDT's goal of increasing domestic expenditures.

Media advertising includes ads placed on TV, cable, radio and online outlets, as well as those placed in magazines and newspapers.

Online Advertising Encouraged – The marketing opportunities offered through the co-op program continue to reflect the Division's increases in online presence. The online maximum for Destination Advertising was increased to 25 percent during FY09.

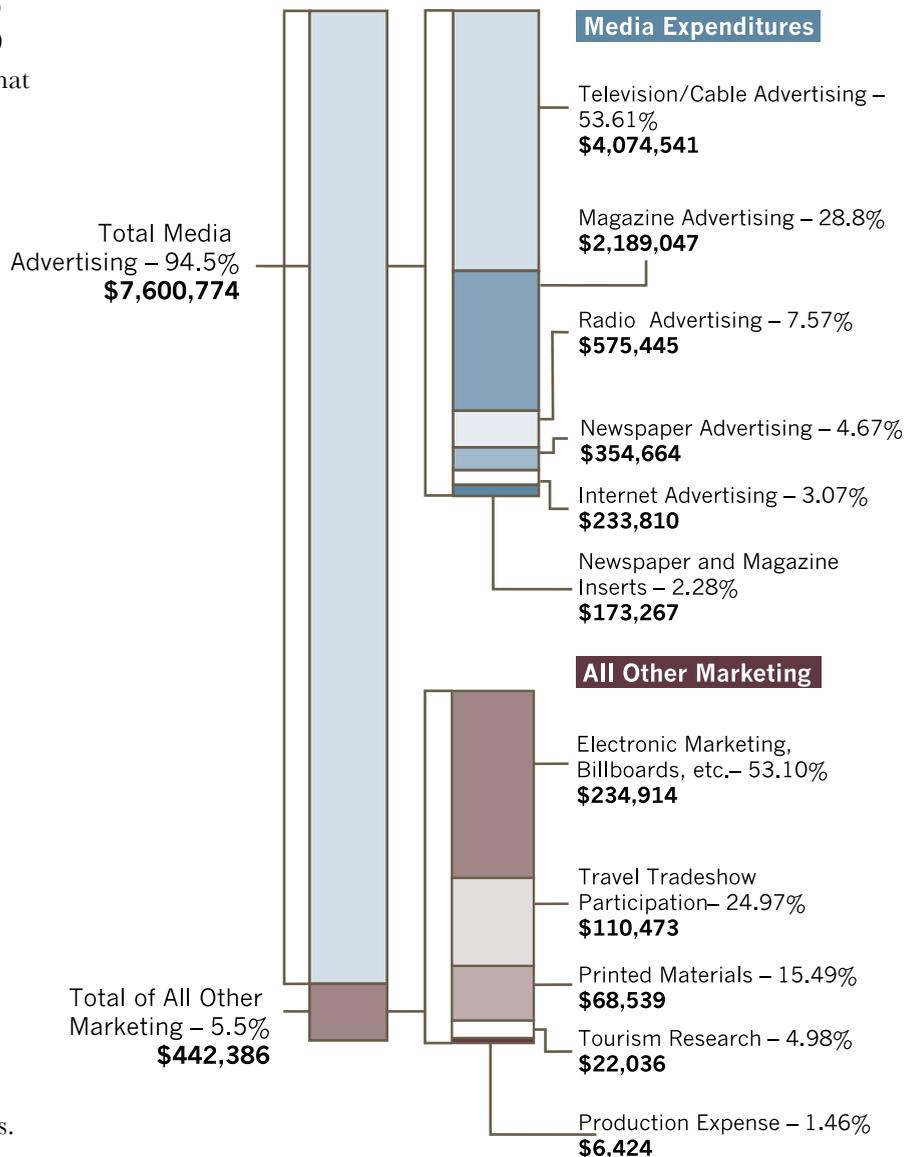
HIGHLIGHTS DURING FY09

FY09 Co-op Reaches More Than Two Billion Potential Travelers – The FY09 Program Summary Report details that \$4,015,713 of reimbursements was paid to Missouri DMOs for FY09 advertising and marketing projects. The full report is available in the co-op section of www.Industry.VisitMO.com.

Shift To Countywide Focus Encourages Broader-Based Marketing Messages – For FY09, MDT added \$850,000 to the Cooperative Marketing budget and redesigned the funding structure to a countywide-based marketing partnership. This approach encourages DMOs to assume broader-based marketing messages to promote Missouri tourism, rewards both inter- and intra-county partnerships, establishes performance measurement benchmarks and allows possible county by county outcome measurements reporting.

Media Advertising Totals For FY09 Program Reach A Record \$7.6 Million – Media advertising comprised a healthy 94.5 percent of the FY09 Cooperative Marketing expenditures.

Marketing Expenditures



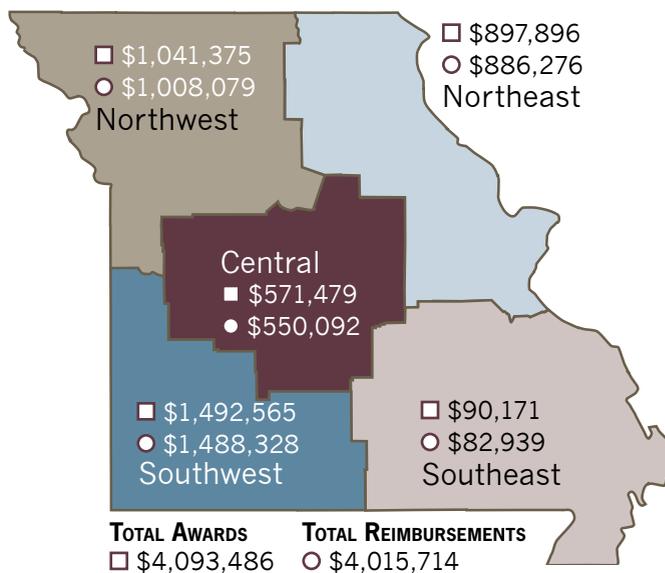
Cooperative Marketing Program

\$4.085 Million In FY10 Co-op Projects Approved – Applications totaling more than \$4.1 million were received, processed and evaluated during this fiscal year. The majority of the award notifications were mailed to those DMOs with winning bids on the last business day of May. The list of all FY10 awards is posted on the co-op section of www.Industry.VisitMO.com.

MDT Assists DMOs In Complying With New State Law – The co-op program assisted all co-op marketing partners in complying with the new Missouri statute, Section 285.525-285.550 RSMo, for all who hold contracts of more than \$5,000 with the State. These requirements include registering with the federal Department of Homeland Security to verify the eligibility of employees to work in the U.S.

MDT And Advisory Committee Work To Ensure High-Quality Projects – MDT and the Cooperative Marketing Advisory Committee completed the annual strategic planning process during June. Approved amendments to the program guidelines will go into effect for the FY11 RFP process. Most notable among the revisions is a new evaluation measure for the Leisure Travel Marketing category and a realignment of the minimum score for all categories to 70 points.

Cooperative Marketing Awards and Reimbursements for FY09



- AWARDS – The budgeted Cooperative Marketing expenditures.
- REIMBURSEMENTS – The amounts actually expended.



MDT's Becky Heeren, Cooperative Marketing Officer, presented specifics at this 2009 Cooperative Marketing Workshop

Communications Program



MISSOURI VACATION PLANNER/ MISSOURI TRAVEL GUIDE

The 2009 Missouri Vacation Planner is a first and a last. It was the first in history to receive an award, and last to be called “Vacation Planner.” Research showed that “Travel Guide” is the most well-recognized name.

VISITMO.COM

In 2008, **VisitMO.com** underwent a complete redesign which included a new platform that is still a work in progress. The ongoing challenge in 2009 was to continue to notify the industry about this free marketing tool.

VisitMO.com Web Site Report – FY09
(July 2008 – June 2009)

Total Web Site Visits	868,198
Monthly Average	72,350
Unique Visitors	764,262
Pages Viewed	3.2 Million
Average Time on Site	0:03:30

New Features:

- Events Calendar:** This calendar allows users to search all Missouri events by a date or date range. Visitors to the site can then sort the events alphabetically by the event name, city and type of event, or chronologically by event date.

- E-mail registration:** MDT promoted a Web site sign-up area for an e-mail marketing campaign. This encourages travelers to sign up to receive e-newsletters, discounts and promotions from MDT.

KEEPING UP WITH SOCIAL MEDIA

Social media is a changing and ever-growing phenomenon and a communications world must. MDT spent time researching and developing a social media plan to engage our target markets.

The Plan:

- Twitter.com** – One of the social media sites MDT uses is Twitter. Twitter users match our targets with 50 percent female, and 70 percent ages of 18 to 49.
- Facebook.com** – With statistics almost identical to Twitter, Facebook seemed most suitable for the Division. MDT’s Facebook Fanpage was thus developed. Go to Facebook and search Missouri Division of Tourism.
- VisitMOBistro Blog – The VisitMOBistro.com** was developed with a café theme to “serve up delectable places to go” in Missouri.

THE MISSOURI TOURISM NEWS BUREAU

News.VisitMO.com was created in FY08 as a designated Web site for media members to find images,

Communications Program

news releases, story ideas and ideas for familiarization tours. In FY09, 175 members registered and MDT received 118 requests for information.

The News Bureau staff also created themed media kits to assist media and give them ideas for stories. The current kits include Civil War, Route 66, Caves, and African-American History.

COMMUNICATION NUMBERS

Ad Equivalency By Quarter:	Amount
1st	\$503,152.38
2nd	\$247,189.20
3rd	\$372,012.49
4th	\$346,325.65
Total	\$1,468,679.72

Quantity	Communication outreach
7	individual press tours
5	group press tours
21	news releases
5	Civil War video news releases
21	Civil War vignettes repurposed for public relations
5	fishing videos with Scott Pauley
1	Springfield video
1	St. Louis video
1	Jefferson City video
1	Columbia video
1	Float Trips video
1	Wine Country video
111	media requests and pitches

CONFERENCES/SPONSORSHIPS/

FAMILIARIZATION TOURS

Travel Media Showcase (TMS)

The annual Travel Media Showcase (TMS) conference was held in Kansas City. TMS provides an opportunity for travel writers and industry professionals to meet, exchange information and develop personal contacts. MDT met with more than 35 travel writers during the conference. Following the conference, MDT hosted three familiarization tours (Famous Faces, Eat, Drink and Be Merry, and Rolling on the River).

Public Relations Society of America (PRSA)

Tourism Conference

PRSA's annual Travel and Tourism conference was held in Kansas City in May 2009. Staff members attended this conference and MDT sponsored a "Meet the Media" mixer at the College Basketball Experience. Media members from the *Washington Post*, *USA Today*, *Travel Channel* and *National Geographic* were present.

MISSOURI'S FISHING AND OUTDOOR

TOURISM SPOKESPERSON

Identified as one of the most influential outdoor leaders in the state, professional fisherman Scott Pauley represented the Missouri Division of Tourism (MDT) at the Summit on Missouri Outdoors. Hosted by Gov. Jay Nixon and the Conservation Federation of Missouri, the goal of the Summit was to create a vision for ensuring quality outdoors for the next 75 years.

Pauley's other responsibilities for MDT include working with press on outdoor activities and attending speaking engagements focused on outdoors. Pauley has also worked with MDT to produce a series of videos available on the MDT YouTube channel.



Travel writers enjoying a ride in J.C. Penny car in Hamilton

Group Travel

GROUP TRAVEL OVERALL

The Missouri Division of Tourism's (MDT) group travel program promotes Missouri as a memorable destination for group travelers. This is accomplished by increasing the amount of Missouri products offered by domestic group tour planners while using trades shows, advertising, public relations and promotions to reach group target markets.

Additionally, MDT and its representatives compile leads from international and domestic tradeshows, fa-

miliarization tours and promotions. The information is then electronically distributed to the Missouri tourism industry. A total of 517 leads were distributed in FY09.

DOMESTIC GROUP TRAVEL MEDIA

In addition to organized group press trips, individual media visits are coordinated by MDT for domestic group tour media. A FY09 example includes, but is not limited to, *Leisure Group Travel Magazine* (U.S.).

DOMESTIC GROUP TOUR ASSOCIATION MEMBERSHIPS AND ANNUAL CONVENTIONS

National Tour Association (NTA) Membership and Annual Convention (www.ntaonline.com)

An ever-evolving organization, NTA is considered a mainstay in the group travel arena. The tour operator membership includes student-specific operators, senior citizens, baby boomers, individual package operators and international companies. Their convention consists of tour operator appointments, plus networking and educational opportunities.

American Bus Association (ABA) Membership and Annual Convention (www.buses.org)

Along with NTA, the American Bus Association is considered a leader in the group tour industry, representing approximately 1,000 motorcoach companies in the U.S. and Canada. The ABA convention is similar to NTA with tour operator appointments, networking and educational opportunities. Tour operators are primarily American with some Canadian operators.

BankTravel Membership and Conference (www.banktravel.com)

An organization of bank loyalty program directors, BankTravel is considered the leader in the bank travel arena. BankTravel's conference attracts bank group travel planners who meet with tourism suppliers for appointments and networking.

Missouri Showcase Marketplace (www.missouritravel.com)

Each August, Missouri Travel Council hosts group leaders, travel agents and tour operators for a seven-day familiarization (FAM) tour of Missouri. There is also a Marketplace that allows tourism suppliers to meet with FAM participants for pre-scheduled appointments. MDT is represented on the planning committee and is one of the FAM tour escorts.



Missouri Showcase Marketplace visiting Experimental Mine, Missouri University of Science and Technology, Rolla.

Group Travel

Missouri Bank Travel Exchange (www.missouritravel.com)

The third annual Missouri Bank Travel Exchange, sponsored by Missouri Travel Council, was held in 2009. The conference brought bank loyalty club travel planners from Missouri, Kansas, Iowa, Illinois, Arkansas and Tennessee together with regional tourism suppliers for pre-scheduled, appointments and networking. MDT offers representation for those who are in areas of our state that are not able to attend.

International Motorcoach Group (IMG) Membership and Conference (www.imgcoach.com)

IMG is a collection of motor coach companies dedicated to operating for the benefit of the motorcoach travelers. The IMG conference brings tourism suppliers together with tour operators for open-appointments, networking and educational opportunities. Suppliers review buyer profiles and determine those buyers with whom they would like to meet. The August 2009 conference was held in Branson.

Missouri Travel Council Group Tour Educational Conference (www.missouritravel.com)

MDT representatives worked with Missouri Travel Council to coordinate the spring MTC Group Tour Educational Conference. The conference included a full day of topics: Inside Missouri Tourism, Tradeshows & Conferences, Technology 101, a panel discussion on tracking, roundtable discussions and a buyer's panel addressing numerous industry issues.

Travel Alliance Partners Membership/TAP Into Southern Treasures (www.travelalliancepartners.com)

Travel Alliance Partners, LLC, (TAP) currently has 34 tour operator companies and is the innovator of the "guaranteed departure" concept. Missouri is a TAP preferred partner. As such, MDT is invited to represent the state at the TAP Dance Conference. TAP brings tour operators together with preferred, invitation-only tourism suppliers for four days of appointments, education and networking.

Grand Central USA (www.grandcentralusa.com)

Grand Central USA is a partnership between Arkansas, Kansas, Missouri and Oklahoma with the express purpose of creating fresh, unique regional itineraries and promotions. Grand Central USA currently features 19 thematic multi-state itineraries and promotes the organization through special events held at Missouri Bank Travel Exchange and TAP Dance.

Student Youth Travel Association (SYTA) Membership and Annual Convention & Summit (www.syta.com)

SYTA is the non-profit, professional trade association that promotes student and youth travel. The SYTA convention consists of scheduled appointments between tour operators, tourism suppliers, and destinations. SYTA Summit is designed to allow maximum networking opportunities for select tourism suppliers.

All Things Musical Membership

A professional trade organization that brings together travel groups interested in music-based tours with destinations and suppliers. They are one of the few associations dedicated to music-themed, student trips. MDT provides a statewide information resource for those travel groups considering Missouri tours.

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

International Marketing

INTERNATIONAL MEDIA

In addition to organized group press trips, individual media visits are coordinated for international group tour media from Canada, the United Kingdom and occasionally, Germany. FY09 examples included *The Metro Newspaper* (U.K.) and ARD TV (Germany).

U.K. GROUP PRESS TRIP

Missouri hosted five media members from the U.K. on a five-day trip that included Branson, Meramec Caverns and St. Louis. The “Missouri Must Haves” tour participants included the *Travel Channel* (9 Million viewers in U.K. & Europe); *Sunday Mail*, Scotland (Circulation 450,000); *Birmingham Mail*, *Goggle Eye* (Circulation 200,000 total); *Wolverhampton Express & Star* (Circulation 185,000) and *News of the World* (Circulation 3.5 million).

Ad equivalency from U.K. public relations efforts is estimated at \$260,926.

MILESTONES DIRECT MAIL CAMPAIGN

An eight-page flyer featuring tours to Missouri, Colorado and Utah ran in U.K. papers: *Saturday Times* (100,000), *Saturday Telegraph* (100,000) and *Daily Mail* (125,000). The objective: increase Missouri profile/sales through an early booking offer from Milestones. Distribution was based on geography and propensity to book long haul tours. Promotion garnered 319 booking inquiries.

OVERALL INTERNATIONAL TRADESHOWS

U.S. Travel Association’s International Pow Wow (www.powwowonline.com)

International Pow Wow is the travel industry’s premier international marketplace and is the largest tradeshow generator of U.S. travel. More than 1,500 international and domestic buyers from 70 countries conduct business with U.S. travel organizations resulting in more than \$3.8 billion in future U.S. travel. Media from around the world also participate in appointments.

World Travel Market (WTM) (www.wtmlondon.com)

Celebrated as the premier event for world tourism, WTM is held annually in London. Media and travel trade come from around the globe,

with 48 percent from the U.K. Media.

CANADIAN EFFORTS

Missouri’s Canadian in-country representative conducts sales calls to tour operators, travel partners, the media and assists in coordinating sales missions. In addition, the office represents Missouri at Travel Media Association of Canada (TMAC), Discover America Canada Association meetings, tour operator destination training sessions and product launches.

Ontario Motor Coach Association (OMCA) Annual Convention & Missouri Tour Operator Breakfast (www.omca.com)

Arguably the largest group tour association in Canada, OMCA brings Canadian tour operators, primarily from Ontario and the northeast United States, together with U.S. suppliers. During the convention, Missouri hosts the annual Missouri Tour Operator Breakfast open only to tour operators and Missouri delegates. The breakfast provides a platform for Missouri tourism delegates to network with these important travel trade buyers.

Perceptions of Missouri Among Canadian Travelers



Source: Synovate 2008 Canadian Study

International Marketing

MISSOURI DAYS IN CANADA

The 10th annual Missouri Days in Canada sales mission to the Toronto area was open to the Missouri tourism industry. It consisted of four days of tour operator calls, training and a VIP media/tour operator dinner.

Canadian Research Stats (most recent – CY08)

165,500 Canadians visited Missouri in CY08. (Source: Statistics Canada, 2008)

Canadians spent \$318.13 (U.S.) per person per visit.

\$11,902,411 was spent in Missouri businesses by Canadians. (Source: Statistics Canada/Tour Operators)

\$54.72 in expenditures is returned for every dollar MDT spends on marketing. (Source: Statistics Canada, 2008)

UNITED KINGDOM EFFORTS

Visit USA Roadshows

Each December, Visit USA hosts a roadshow inviting key travel agents to a workshop. Missouri is promoted as a must-visit U.S. destination to U.K. travel agents.

A total of 347 agents were presented with information on Missouri during roadshows in London, Birmingham and Leeds.

U.K. SUMMER SALES MISSION

Each summer, MDT coordinates a U.K. sales mission that includes meetings with media and tour operators, destination training for U.K. tour operators and/or sales staff and special VIP media/tour operator events. These events include the Visit USA Independence Day Event as well as the Discover America Media Marketplace.

Premier Holidays – Independence Day Promotion

Aimed at travel agents, this event promoted America as an affordable vacation destination. Premier's top 100 selling agents received promotional posters. Their trade e-newsletter (c. 4,500) featured a range of special offers to America. A dedicated consumer e-newsletter was sent to 20,000 previous bookers/inquirers.

Bon Voyage VIP Consumer Show

A VIP consumer show was held to showcase Missouri as a holiday destination to Bon Voyage guests in Southampton. Bon Voyage hosted 350 guests who were known to have an interest in U.S. travel.

Destinations Show, London

Destinations Show is a prestigious consumer show with an attendance of 34,892. During the show, a prize drawing was held accumulating entries that increased Missouri's U.K. consumer database by 112 percent.

United Kingdom (U.K.) Research Stats (most recent – CY08)

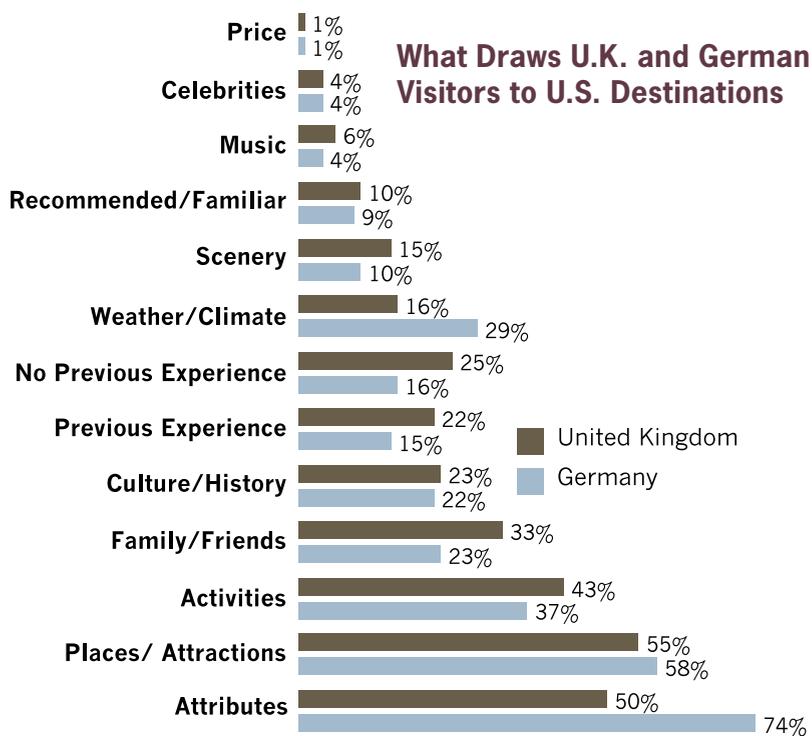
CY08 saw an estimated 30,000 visitors from the U.K. *

\$551.37 per person per visit is the average spending estimate for the U.K. traveler.*

\$22.3 million was spent in Missouri businesses by U.K. travelers.

For every dollar MDT spends on marketing in the U.K., \$54.22 was returned to Missouri businesses in expenditures.

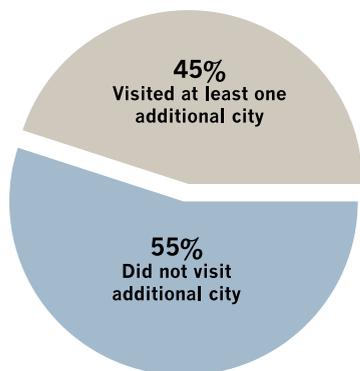
**(Estimates based upon aggregate Visa card usage data provided by VisaVue® Travel for 2008)*



Source: TNS U.K./German Study

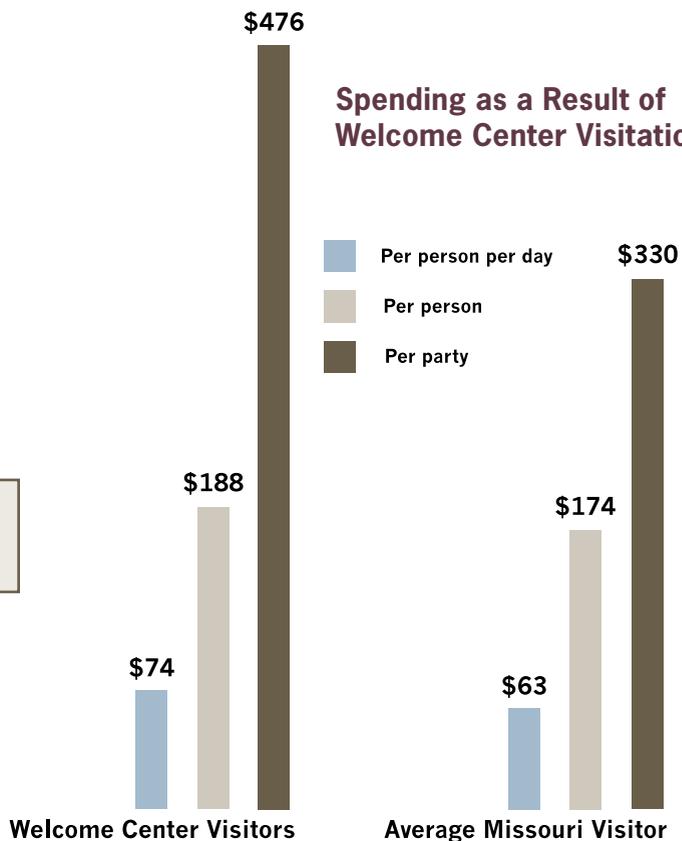
Welcome Centers

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.

Spending as a Result of Welcome Center Visitation



Mosaic Mural - Eagleville Welcome Center

Welcome Centers

In cooperation with the Missouri Department of Transportation (MoDOT), the Missouri Division of Tourism (MDT) operates seven Welcome Centers located in rest areas at key entry points around the Missouri border: Eagleville, Hannibal, Joplin, Kansas City, New Madrid, Rock Port and St. Louis. The staff serves as the front-line sales team for Missouri tourism businesses. Thousands of brochures are available to visitors as they pursue their Missouri vacations.

WELCOME CENTER PROJECTS FOR FY09

Operation Orange

Promotion “Operation Orange” was held in conjunction with MoDOT’s Work Zone Awareness Week, April 6-10, 2009. With the assistance of the local MoDOT barns, the centers had contest displays honoring fallen MoDOT workers. Several centers drew an excellent variety of media. A review panel from MDT and MoDOT declared New Madrid the Welcome Center decorating contest winner.

Annual Staff Educational Tours

Welcome Center staff take tours to update their Missouri knowledge to better serve our travelers. Organized in brief stops throughout Missouri, this year’s destinations were St. Louis, Defiance, Hermann, Imperial, Kimmswick, and the Kansas City area.

Affiliate Welcome Centers

The Affiliate Welcome Centers program is designed to recognize CVBs, chambers of commerce and educational institutions that mimic the standards of the state centers. MDT provides approved centers with brochure resources and initial training. A valuable asset as state ambassadors, the seven current centers have hours and information similar to the state facilities.

Community Involvement

Besides welcoming travelers into our state, the Welcome Center staff are also Missouri’s ambassadors. Involved in their communities, they attend industry meetings such as the Pony Express Region Tourism Commission, River Heritage Association and St. Louis Attractions Association. They make presentations to elementary schools, women’s organizations, and hospitals.

Visitor counts by center FY09:

Welcome Center	Number of Visitors
Eagleville	61,409
Hannibal	60,061
Joplin	108,990
Kansas City	41,495
New Madrid	101,730
Rock Port	64,262
St. Louis	48,977
Grand Total	486,924



Photo courtesy of Missouri Department of Transportation

Calendar Year 2009

Regional/National Partnerships and Associations

U.S. Travel Association (Formerly TIA)

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) www.ttra.com

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 visitors 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.

Missouri Broadcasters Association

The non-profit Missouri Broadcasters Association promotes the interests of the radio and television broadcasting industry in Missouri. Its objectives include operating a strong educational program for its members and public advocacy.

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 2008 as the Freedom's Frontier National Heritage Area (FFNHA). This region's story tells, not only of the pre-war events leading to the conflict, 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 Web site, newsletters, press releases, special promotions, itineraries and a travel guide to entice international visitors to the region.

Missouri Rail Passenger Advisory Committee (MORPAC)

MDT serves on MoDOT's MORPAC committee. Last year they conducted the "Name the Train" contest with Amtrak and chose **Missouri River Runner** as a name that evokes images of the river that parallels the cross-state route.



Calendar Year 2009

Awards: Received and Presented

HSMIA Adrian Awards for Advertising

The Hospitality Sales & Marketing Association International (HSMIA) awarded Hoffman|Lewis (MDT's advertising agency of record) three gold Adrian Awards for excellence in advertising and Web marketing. Hoffman|Lewis and MDT also earned eight silver and four bronze Adrians in print, broadcast, online and promotions categories. The Adrian Awards Competition is the largest and most prestigious global travel marketing competition. It attracted more than 1,100 entries in 2009.

Missouri Press Foundation Service Award

R. B. "Bob" Smith, interim director of MDT, was honored with a 25-year service award. Smith is a founding member of the Foundation and is past president of MPA. The Missouri Press Foundation was formed by the Missouri Press Association (MPA) to provide journalism scholarships, journalism merit awards and coordinate newspaper-in-education programs.

International Research Award

Jerry Henry and Associates and the MDT research team were presented with the prestigious J. Desmond Slattery Professional Research Marketing Award by the Travel and Tourism Research Association (TTRA) for their joint work on the Missouri Welcome Center Research Study. To receive this award, a travel research project must demonstrate an "innovative and significant contribution to travel and tourism marketing research." The award was presented at the annual conference.

Ranly Publication Award

The 2009 Missouri Vacation Planner received a Ranly Award from the Missouri Association of Publications. Entered for Best Entire Issue in the Government & Public Services category, the award was presented at the annual conference.

2009 Missouri Tourism Awards (Presented at the Annual Fall Governor's Conference on Tourism)

Missouri Tourism Hall of Fame: Recognizes individuals whose long-term contributions have positively affected the tourism industry as demonstrated by a commitment beyond personal gain.

CY09 Recipients: *Gene and Eleanor Maggard, owners of Akers Ferry Canoe Rental and Campgrounds*

Senator Emory Melton Legislative Award: Recognizes those who work closely with the legislative process, comprehend tourism's value to the state and worked to ensure the industry flourishes.

CY09 Recipient: *Senator John Griesheimer, 26th District, Washington*

Marketing Campaign: This award recognizes achievement in effective, integrated marketing campaigns.

CY09 Recipient: *The St. Louis Convention and Visitors Commission*

Pathfinder: Given in recognition of marketers aiming for niche markets and hitting the target.

CY09 Recipient: *Lorah Steiner, Director, Columbia Convention and Visitors Bureau*

Innovator: Pays tribute to smaller tourism entities that achieve great results with a small budget.

CY09 Recipient: *2008 Heritage and Freedom Fest, O'Fallon*

Navigator Award: For a media outlet that spotlighted tourism and the importance it plays in Missouri's economy.

CY09 Recipient: *Madden Media*

Ambassador Award: Presented to an individual who has supported the state's tourism promotion efforts through cooperation with MDT, providing publicity for Missouri tourism or other efforts to help travelers enjoy our state.

CY09 Recipient: *Karen Krispin, Executive Director, Maryland Heights Convention and Visitor Bureau*

Spotlight Award: Recognizes an individual, business or organization not usually considered a part of the tourism industry but who has notably spotlighted Missouri Tourism.

CY09 Recipient: *College of the Ozarks Division II Basketball National Championship Tournament, Point Lookout*



*Hall of Fame winners
Gene and Eleanor Maggard*

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Back Cover Photo: Tulips in the Carnahan Memorial Garden, Jefferson City