

SWMT RFP 2024-01 Responses to Questions – April 5, 2024

RFP Question	SWMT Response
P15: “Campaign Monitoring, Optimizing, and Reporting”: What is your preferred cadence for receiving media campaign performance reports (monthly, quarterly, campaign end), PR reports and overall marketing performance reports?	We would like periodic updates, at a minimum at the end of the campaign; however monitoring during the campaign should be conducted to determine if an adjustment is desired.
Your FY24 marketing plan cites your key metric as “leads.” Please share your definition of a “lead” and how you currently are collecting and storing leads.	Leads may come from a magazine such as we place an ad in “Yellowstone Journal” or we can get leads through calls, website, an arranged media placement.
P 16 - Program Detail/2.1 Characteristics Specifications: What is the scope of services assigned to the current social agency?	Current social media is placed by our Website Agency. They work with our current agency who will place paid social ads per media buy opportunities.
Is planning and buying for paid social (including dark and boosted posts) under their purview, or considered part of the scope of this RFP?	The website agency handles organic and boosted posts. Any other paid social media can be placed with the media campaign but needs to be relayed to the website agency.
Who manages influencer relationships?	This is done through some of our local partners (Chambers and Convention and Visitor Centers, and if the ad agency has viable opportunities for this we are interested.)
P 17: Will your marketing agency of record’s responsibilities include paid search (SEM) management and if so, will you be transferring your existing search account and search campaign builds to the agency that is awarded this RFP?	Our website agency does our SEM and Google placements and, therefore, not an expectation of the ad agency contract.
P 17 – Scope of Services / 2.2.3 Media Planning & Buying: Will your marketing agency of record be responsible for managing Southwest Montana’s own co-op marketing and/or advertising programs? If so, can you provide more detail around the scope of each of those as outlined on: https://members.southwestmt.com/ (grant program) and https://members.southwestmt.com/promoteyourbusiness/ ?	The ad agency will not be responsible for the co-op marketing we use with our members; we offer financial assistance to help local nonprofits market their own events and attractions. If we were to use the ad agency to market something for our partners and we paid for it then, yes, we would the ad agency to manage this for us.
P 21 - Cost Proposal/4.0 Budget: Is the \$300,000 agency of record budget identified inclusive of all pass-through paid media placement costs and other out-of-pocket costs, or are those accounted for elsewhere?	Yes, it is inclusive and no, they are not accounted for elsewhere.
P 22 - Cost Proposal/4.0 Budget: Cost proposal: Can you clarify how you define the hourly rate to support “Costs associated with subcontracted work?” Does this mean time spent on vendor management?	Yes and anything else that may be relevant.
P 23 – Cost Proposal/4.7 Additional Rates: Can you confirm that 4.7.1 is the correct spot to list any hourly rates not accounted for in the list provided under 4.1 (for example, our hourly rate for campaign reporting and analytics)?	Yes it is.
In Section 2, the “Note” on page 13 says that “Each item must be thoroughly addressed.” Can you please define “item.” Is an item a paragraph; the numbered lines or bullets; or the sections labeled 2.0, 2.1, etc.?	On Section 2, Scope of Project – for each paragraph that applies “If no exception, explanation, or clarification is required in the offeror’s response to a specific subsection, the

	offeror shall indicate so by the paragraph or in the point-by-point response with the following:
	“(Offeror’s Name)”, understands and will comply.
Does SWMT collaborate with the statewide DMO in any way, i.e., through co-ops, integrated marketing planning, grants, etc.? If so, how?	Yes, we collaborate through joint ventures, and at times with our regional partners, if ideas come up that are of interest to us. Right now we are in partnership with the state on Teads, Jun, Sojern, Brand USA Inspiration Guide.
2.2.4, Earned Media/Public Relations (Page 18): Would the travel costs for hosting media and/or influencers come from the agency’s budget?	Yes, for the agency but out of the public relations budget for the influencers.
4.1, Service and Hourly Rates (Page 21): Does the \$300,000 budget include working media?	Yes
Target Audience and Geographical Focus: The RFP mentions promoting SWMT to state, regional, national, and possibly international markets on page 5. Could you provide more detailed demographic information about the target audience within these markets? Are there specific international regions where SWMT Tourism is particularly interested in increasing its visibility? Can you also share more information on your current audience?	<p>Demographics</p> <ul style="list-style-type: none"> • Active mature/boomer audience with a focus on soft adventure. • Travelers with time and interests in culture and heritage. • Anyone interested in history including mining, cowboy and cattle, Nez Perce, trails, and art. • Adventure visitors wanting to hike and bike trails such as Continental Divide. affluent visitors willing to fly and seek out activities and attractions. <p>Geographic</p> <ul style="list-style-type: none"> • Visitors going to Yellowstone and Glacier National Parks • Montanans • Regional travelers and visitors from Washington, Idaho, Utah, Colorado, Texas • Canadians – focus on Calgary <p>Psycho-graphic</p> <ul style="list-style-type: none"> • History, heritage and culture enthusiasts. • Hikers, bikers, wildlife enthusiasts, photographers. • People interested in exploring ghosts in the region. • Visitors without deadlines and willing to spend time exploring. <p>Ghost enthusiasts. A very large majority of our current audience is 55 years old and older – generally about 80%.</p> <p>We would like to capture the returning visitors to the Parks to our region for vacations, highlighting our attractions and the lack of overcrowding.</p>

	<p>We are evolving and really want to engage with emerging audiences and expand the target audience.</p> <p>Our current international marketing has been very small as our dollars have generally been used for other marketing options. We partnered in a Brand USA ad this past year.</p>
<p>Partnerships and Cooperative Marketing: The RFP mentions cooperative development and partnerships on page 15. Can you provide examples of current partnerships and how new partnerships are evaluated and integrated into SWMT Tourism's marketing strategy?</p>	<p>We currently partner with Glacier Country and Yellowstone Country on the Glaciers to Geysers promotion. We do joint ventures with the state and they are usually offered in the spring – this year we are doing Sojern, Jun Group, Teads, and Pinterest.</p> <p>We are open to new partnerships and it usually happens when an opportunity or an idea has emerged and discussed and information that would substantiate the investment is presented.</p> <p>We also have several partners with the Lewis and Clark National Park promotion –this one comes out of our own funds for the joint ventures and not the ad agency as it is a multi-state program.</p>
<p>Performance Metrics and Goals (Page 16): What specific performance metrics or goals does SWMT Tourism aim to achieve through this marketing initiative? Are there benchmarks from previous campaigns that proposals should aim to exceed?</p>	<p>We have not set any benchmarks or goals for this but will be doing so in the near future, may need to be altered a bit depending on the chosen agency of record.</p> <p>We now use key performance indicators and they are figured out differently. Sometimes it might be an increase in traffic to certain places or increase in website activity, how many travel guides were given out, sometimes calls to attractions, some media places will give us leads or number of exposures to an ad. Here is a simple example of some of our previous metrics:</p> <ul style="list-style-type: none"> • \$1.50 average cost per click • Generate at least 1200 leads • Print advertising to reach over 300,000 under \$40 average cost per thousand <p>Last year the requirements had changed for our goals and objectives; and this year the state wants us to go back to more measurable goals – like increase revenue by 2%; increase exposure to travelers by 3%, or whatever we can do to show a ROI. Our goals for last year ended up without some of the specific metrics</p>

	<p>and the Tourism Advisory Council would like more measurements this year:</p> <p>Destination Marketing – last year’s sample</p> <ol style="list-style-type: none"> 1. Increase visitors to the region. 2. Provide information to assist locals, travelers, and aspiring travelers to the region. 3. Offer our rural and regional partners cooperative marketing and connecting/ collaborating opportunities. 4. Increase our film, video, and photography inventory. <p>Destination Management, Destination Stewardship, and Destination Development are listed as placeholders for potential opportunities that are not presently available.</p> <p><i>4a. Describe proposed tactics and projects as related to overall goals and controlled by the organization in its financial statements.</i></p> <ol style="list-style-type: none"> 1. Increase travelers to the region. <ol style="list-style-type: none"> a. Produce and distribute Southwest Montana Travel Guide around the state, and to Spokane, Coeur d’ Alene, Idaho Falls, and Salt Lake City. b. Use multi-media marketing including print, online, and digital. c. Use social media including our blogging to entice the potential traveler.
<p>Scope of Future-focused Project Engagement: The document mentions a desire for future-focused project engagement on Page 5. Could you elaborate on what types of innovative or emerging marketing tactics Southwest Montana Tourism is interested in exploring?</p>	<p>This might be a new emerging opportunity that we can engage in as soon as some options present themselves. We put funds in Opportunity Marketing to help if we have a chance at something that would give us an edge or if something suddenly became available.</p>
<p>Page 13: Section 2, Scope of Project references meeting “Yellowstone Country Montana Inc. requirements.” We presume this to be a typo and the language should read “Southwest Montana requirements.”</p>	<p>Yes this was a typo and is corrected.</p>
<p>Page 16: Section 2.1, Characteristics Specifications & Expectations. Under Agency of Record Specific Expectations, the seventh bullet references GAP Principles. In the context of the fiscal requirements specified, we believe this refers to GAAP (Generally Accepted Accounting Principles), but wanted to confirm.</p>	<p>Yes this is correct</p>
<p>Regarding Page 5, the paragraph beginning “Candidate agencies...” in the RFP: “NOTE: Any subcontracted agency</p>	<p>Yes this is correct</p>

<p>hired by the lead agency must have the capabilities and demonstrable experience to carry out the specific portion of the SOW being subcontracted and must first be approved by SOUTHWEST MONTANA.” - Can you clarify what this means? Are agencies allowed to include proposed subcontractors within their proposals, with the caveat that they are only approved to carry out the specified work based on approval from Southwest Montana?</p>	
<p>Regarding page 18, 2.2.5 Creative Services, can you share examples of your current/previous advertising creative?</p>	<p>Here are some of our ads. We like to include a map when it works to really help with location identity since we don't have name recognition.</p> <p>..\..\Media\SWMT History True West Spread 1024 copy.pdf ..\..\Media\SWMT History True West Virginia City 100622 copy.pdf ..\..\Media\SWMT_Ghost Map 17x11 NOT Folded (002).pdf ..\..\Media\SWMT_Yellowstone Journal_Full Page 1026.pdf ..\..\Media\SWMT Native and Banners Sojern JV March 23.pdf ..\..\Media\SWMT_MT_sticker 010923 (002).jpg ..\..\Media\Southwest Montana 2023 Custom Content (002).pdf</p>
<p>Regarding page 18, 2.2.5 Creative Services, what do you like about your current or previous advertising creative, and where do you hope to see improvements?</p>	<p>We liked our creative because it was so different and versatile. We will look to the agency for new creative.</p> <p>Bringing our brand to new heights showcase our unique offerings and engages with emerging audiences.</p>
<p>Regarding page 17, 2.2.3 Paid Media, what do you like about your current or previous paid media strategies/tactics, and where do you hope to see improvements?</p>	<p>Our current media works well for us based on the funds available. Media covers digital, print, printed materials, and some of our niche markets like history, birding, and our strategic location between two well-known National Parks.</p>
<p>Regarding page 17, 2.2.3 Paid Media, what would you consider to be your established audiences, and which audiences are you looking to “break into” more actively?</p>	<p>The older, more mature age groups, love our region with the history, scenic drives, ease of getting around, friendly small-town communities. We are moving into the paranormal audience, star gazing, book trails, and women travelers.</p> <p>We will be looking at other potential audiences.</p>
<p>Regarding page 17, 2.2.3 Paid Media, which paid media tactics have been the most effective in driving traffic to Southwest Montana? Are you able to track/report on actual in-market traffic/spend driven by marketing, and if so, how?</p>	<p>We track the travel guide, our most effective tactic, which flies off our racks at visitor centers and attractions. We use it for fulfillment for information requests from the call center and from leads generated by some</p>

	<p>of our ad placements. We track digital traffic and traffic to our website. We are looking at using some of the geo fencing for tracking and are in discussions now.</p>
<p>Regarding page 18, 2.2.4 Earned Media/Public Relations, what do you like about your current or previous public relations efforts, and where do you hope to see improvements?</p>	<p>We would like to have more articles published and are open to ideas and suggestions in this category.</p> <p>We need a communication strategy that will support the growing demand for improved communication and engagement with residents, businesses, community stakeholders and visitors.</p> <p>We want to secure competitive differentiation in a saturated marketplace by creating and communicating newsworthy announcements, press releases, and other material to the media and public.</p> <p>We want to gain editorial coverage of SW Montana’s travel appeal, tourism assets and regional accomplishments by hosting media tours, proactively pitching story ideas to media, and creating news releases that target travel media.</p> <p>We would like to see expansion of distinct story angels with an emphasis on elevating awareness of the SW Montana region.</p>
<p>On page 15 of the RFP, under “<i>Southwest Montana is seeking Professional Services for the currently existing projects, programs, and partnerships,</i>” a Travel guide is listed. Can you elaborate on this project? Who will provide the content for the travel guide? Would this be handled entirely by the AOR or as a collaboration?</p>	<p>We have a travel guide committee who assists with the content information but the AOR is in charge of the travel guide for final layout and editing.</p>
<p>Section 2, page 14, Are there any meetings prior to the RFP due dates?</p>	<p>Yes, we have a meeting on April 25th in Anaconda at the Copper Village Museum.</p>
<p>Section 2.0, page 14, Who is your current Agency of Record and What specific pain points are you looking to solve with your current agency?</p>	<p>Our current agency of record is Windfall Studios out of Missoula, MT.</p>
<p>Section 4.6, page 23, What is the current invoicing structure?</p>	<p>Dates, length of time, and person who did the work are recorded for each of the categories. Then on a separate form (Quickbooks) the breakouts are billed by time and amount and by ad placements etc. We like to track costs per project if possible.</p>

Section 2.2.1, page 17, **What are the specific goals and objectives of your advertising campaign?**

Here are some of what we had set up for the last fiscal year. We will be updating them working with the ad agency.

Describe proposed tactics and projects as related to overall goals and controlled by the organization in its financial statements.

1. Increase travelers to the region.
 - a. Produce and distribute Southwest Montana Travel Guide around the state, and to Spokane, Coeur d'Alene, Idaho Falls, and Salt Lake City.
 - b. Use multi-media marketing including print, online, and digital.
 - c. Use social media including our blogging to entice the potential traveler.

2. Increase information to assist and inspire locals, travelers, and aspiring travelers to the region.
 - a. Along with the travel guide, produce and print easy tear-off maps with scenic drives and attractions around the region.
 - b. Produce and print birding brochure, ghost map, Continental Divide Trail information.
 - c. Keep website updated with information, maps and events.
 - d. Use Butte Chamber as call center.
 - e. Use Certified Folder to distribute travel guides and birding brochures.
 - f. Do cooperative marketing with our rural and regional partners.
 - g. Add photos, videos to increase appeal and allure to our potential visitors.
 - h. Partner with University of Missoula graduate students to gather photos and write essays and stories on the communities, rivers, mountains and ecology of Southwest Montana.
 - i. Begin looking at bringing in buses to the region.
 - j. Have one - twos fam tour of frontline workers and members to inform them of the attractions in Southwest Montana.
 - k. Push out our attractions to get written in publications.

<p>Section 2.2.1 page 17, What is the desired timeline for the campaign, including any key milestones or launch dates?</p>	<p>The RFP contract begins July 1st and the agency and Southwest Montana will work with the ad agency to finalize key milestones and/or launch dates. The media plan usually is approved in October.</p>
<p>Section 2.2.2, page 17, What is the seasonality for visitation in the area? Does it vary by city or experience?</p>	<p>The majority of visitation occurs during the summer months and early fall throughout the region. Besides regular visitors, we get lots of fisherman in the summer and hunters in the fall. Our paranormal visitation is picking up as well. We do have three small ski areas that don't have accommodations and are mostly used locally.</p>
<p>Section 2.2.3, page 17, What is your desired collaboration process between your team and ours throughout the campaign?</p>	<p>We will have you come to our board meetings and we can do email, zoom, and phone for other correspondence and we can connect at other meetings that happen at the state level.</p>
<p>Section 2.2.5, page 18, How much of the creative work is distributed amongst the cities within the region? Are there priority attractions/experiences for your visitors?</p>	<p>The creative work is generally focused on attractions, niche markets, communities, and events within the region. We share our creative products with our rural towns and attractions who have limited resources for marketing. We would like to look at opportunities to work and/or partnering with them.</p> <p>Our priority attractions and experiences include scenic drives, history, ghost towns, ghosts, hot springs, festivals, arts and culture, sapphire mining, night sky, state parks, breweries and distilleries.</p>
<p>Section 2.2.1, page 17, Are there specific innovative approaches or experimental tactics you're interested in exploring within this campaign?</p>	<p>Nothing specific at this time, but we are open to exploring new approaches</p>
<p>Section 1.0, page 6, What percentage of tourism comes from drive markets versus outbound markets?</p>	<p>14% of our visitors fly at least one portion of their visit on a plane. Please go to Institute for Tourism & Recreation Research (umt.edu) for more interactive information on Montana and you can drill down by regions as well.</p>
<p>Section 2.2.1, page 17, Will you provide target audience market research you have to date? Are you looking to supplement this information?</p>	<p>Please see the link to our plan for last fiscal year: ..\Marketing Plan\2023Narrative.pdf</p>
<p>Section 2.0, page 14, Can you provide insights into your destination's current positioning and unique selling propositions?</p>	<p>Please see the link to our plan for last fiscal year: ..\Marketing Plan\2023Narrative.pdf</p>
<p>Section 2.2.1, page 17, How does your target audience currently engage with your brand and products/services, and what are the key messages that resonate most effectively with them?</p>	<p>Our audience currently engage opportunities using our travel guide, website, and newsletter for information which focuses on opportunities for uncrowded opportunities, history, and outdoor recreation.</p>

<p>Section 2.6.4 discusses targeting niche travel media outlets. Are there specific niches or demographics Southwest Montana Tourism aims to reach more effectively through these outlets?</p>	<p>Please see the link to our plan for last fiscal year: ..\..\Marketing Plan\2023Narrative.pdf We have just started marketing to paranormal enthusiasts, and will look more at biking and motorcyclists.</p>
<p>Section 2.2.5, page 18, To what extent are you looking for creative innovation versus adherence to established brand standards, and how open are you to exploring new creative concepts?</p>	<p>We are looking for an ad agency to work with us to be innovative and build on past success without constraining ourselves to established brand standards.</p>
<p>Section 2.2.5, page 18, Do you have any existing creative assets or branding guidelines that need to be adhered to?</p>	<p>We will need to discuss this with the ad agency as some things might continue with some alterations. The state used to have branding guidelines that we had to adhere to but they have been softened considerably in the last several years.</p>
<p>Section 2.2.3, page 17, What channels or platforms are you currently using for advertising, and are there any preferences or restrictions for this campaign?</p>	<p>Currently we use joint ventures with the state including Sojern, Jun Group, and Teads. We also utilize our travel guide, print, digital, social media, and multi-media marketing. The state identifies restrictions that may be in place on the use of channels and/or platforms.</p>
<p>Section 2.2.4, page 18, it mentions 'Public Relations and Earned Media Strategies; could you share examples of successful PR outcomes you've achieved or aim to replicate?</p>	<p>Since COVID visitor interests and travel patterns have changed. One example is our paranormal campaign that has exceeded our initial expectations, due in part to the national interest.</p>
<p>Section 4.1, page 21-22, Can you provide a breakdown of current media channel spend?</p>	<p>Please refer to: ..\..\Media\SWMT FY24 Media Plan_Tia_10-31(002).pdf</p>
<p>Section 2.2.2, page 17, What metrics or key performance indicators (KPIs) will be used to measure the success of the advertising campaign?</p>	<p>Currently we do not have specific KPIs for our campaigns, but expect we will develop these with the ad agency.</p>
<p>Section 2.2.2, page 17, How are you currently tracking ROI for your running media campaigns?</p>	<p>We track KPIs which include impressions, click through rates, cost per thousand impressions, cost per click, leads and anything else that is relevant.</p>
<p>Section 2.2.1, page 17, Will we have access to occupancy rates for reporting and analytics, including past data and live during our work together?</p>	<p>We do not get occupancy reports but we do get revenue reports per quarter and you will have access to them and to historical information.</p>
<p>Section 2.2.3, page 17, Do you have an existing relationship for Google grant accounts?</p>	<p>Not at this time.</p>
<p>Section 2, page 14, What metrics will be needed to present to the county board? How often?</p>	<p>We are made up of nine counties and the metrics will need to be determined by the ad agency and approved by Southwest Montana. It will need to be presented whenever it is relevant and in the annual report.</p>

Section 2.1, page 16, How does Southwest Montana Tourism define success for 'Creative and Design Excellence'? Are there benchmarks or past campaigns that exemplify these expectations?	Currently we do not use detailed measurements to determine success of a campaign; but rather rely on communication with our membership and businesses who are involved with a specific campaign. We know, for instance, the paranormal campaign has exceeded our expectations due to the number of people visiting or participating in tours or events.
. Section 2.2.3, page 17, What is your preferred proposal and review process for any content produced?	We expect a presentation of creative to our marketing committee by zoom and/or an in-person presentation at our membership meetings. The review is with the marketing committee and based on experience.
Section 2.2.5, page 18, Will we have access to your current creative assets, and what level of creative production are you looking for? Re-editing of current assets, a complete revamping of assets, additional video or photo production, etc...	The successful ad agency will have access to our current creative; we are expecting new creative as we have used our past creative for several years. We will look at our needs for video and photos. Currently we have an agency that does most of our video and much of our photos.
Section 2.2.5, page 18, On what cadence has the agency of record gone about content production?	Our current agency presented ideas for feedback they felt would get results and would be appealing to us.
Section 2.2.4, page 18, How will seasonality affect any content production?	We have the majority of our visitors in the summer so we spend the bulk of our advertising on warm season.
Section 2.2.5, page 18, Will we have access to your current creative assets, and what level of creative production are you looking for? Re-editing of current assets, a complete revamping of assets, additional video or photo production, etc...	The successful ad agency will have access to our current creative; we are expecting new creative as we have used our past creative for several years. We will look at our needs for video and photos. Currently we have an agency that does most of our video and much of our photos.

Q #	RFP Section	RFP Page	RFP Item	Question
1	Section 1, General Information, Subsection 1.3.6	9	Point-by-point response to all numbered sections, subsections, and appendices	We are interpreting this to mean Sections 2, 3, and 4 of the RFP (as Sections 1 and 5 are RFP administrative details and not scope, qualifications or cost). Can you confirm Sections 2, 3, and 4 are the only numbered sections to be addressed (and tabbed) in our response, or if that is not correct,

				<p>can you state specifically which numbered sections require a response?</p> <p>Response: We require you to acknowledge each section saying you understand and will comply.</p>
2	Section 4, Cost Proposal, Subsection 4.2	22	In-person board and region county meetings	<p>Are you able to provide a calendar of which meetings are required in-person meetings for agency attendance to identify travel efficiencies for out-of-state agencies that are responding?</p> <p>Response: Our meetings are usually the 4th Thursday of the month and may switch due to conflicts in schedules or holidays such as Thanksgiving. Members and the ad agency would be notified ahead of time. The meetings rotate to different towns around the region. We don't usually meet in June, July, August, December, and sometimes not in January. This is not a set in stone schedule but you will be notified at least a month in advance.</p>
3	Section 1, General Information, Subsection 1.1.7 (2)(c), and Section 3, Offeror Qualifications, Subsection 3.2.1	8, 19	Affidavit from legal counsel	<p>Our agency represents both public-sector and private-sector clients, a mixture of which we will use as references in our response. While we are comfortable with the public release of our public sector clients, private sector clients are another matter entirely. Do we need to provide an affidavit from our legal counsel to protect the identities and contact information for private-sector clients?</p> <p>Response: Yes, as all our scoring for the RFPs are done in public meetings and people will have rights to copies of the information.</p>
4	Section 4, Cost Proposal, Subsection 4.0, Budget	21	Budget	<p>Please clarify the statement “the total agency of record budget for this contract is estimated to be \$300,000 per year, based on SWMT’s annual projected budget of accommodations bed tax revenue. This projected budget ranges between \$900,000 and \$1.2 million annually.</p> <p>Is the total advertising budget anticipated to be between \$900,000 and \$1.2 million annually, with the \$300,000 the agency of record fees you anticipate paying OR is the <u>total</u> paid advertising budget \$300,000 for the work outlined in this RFP? This statement is unclear.</p>

				<p>Response: The \$300,000 is an approximate amount for the total advertising budget including the agency. Our payout is now closer to \$350,000 for the current year.</p>
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