

MARKETING PLAN & BUDGET

2023 – 2024

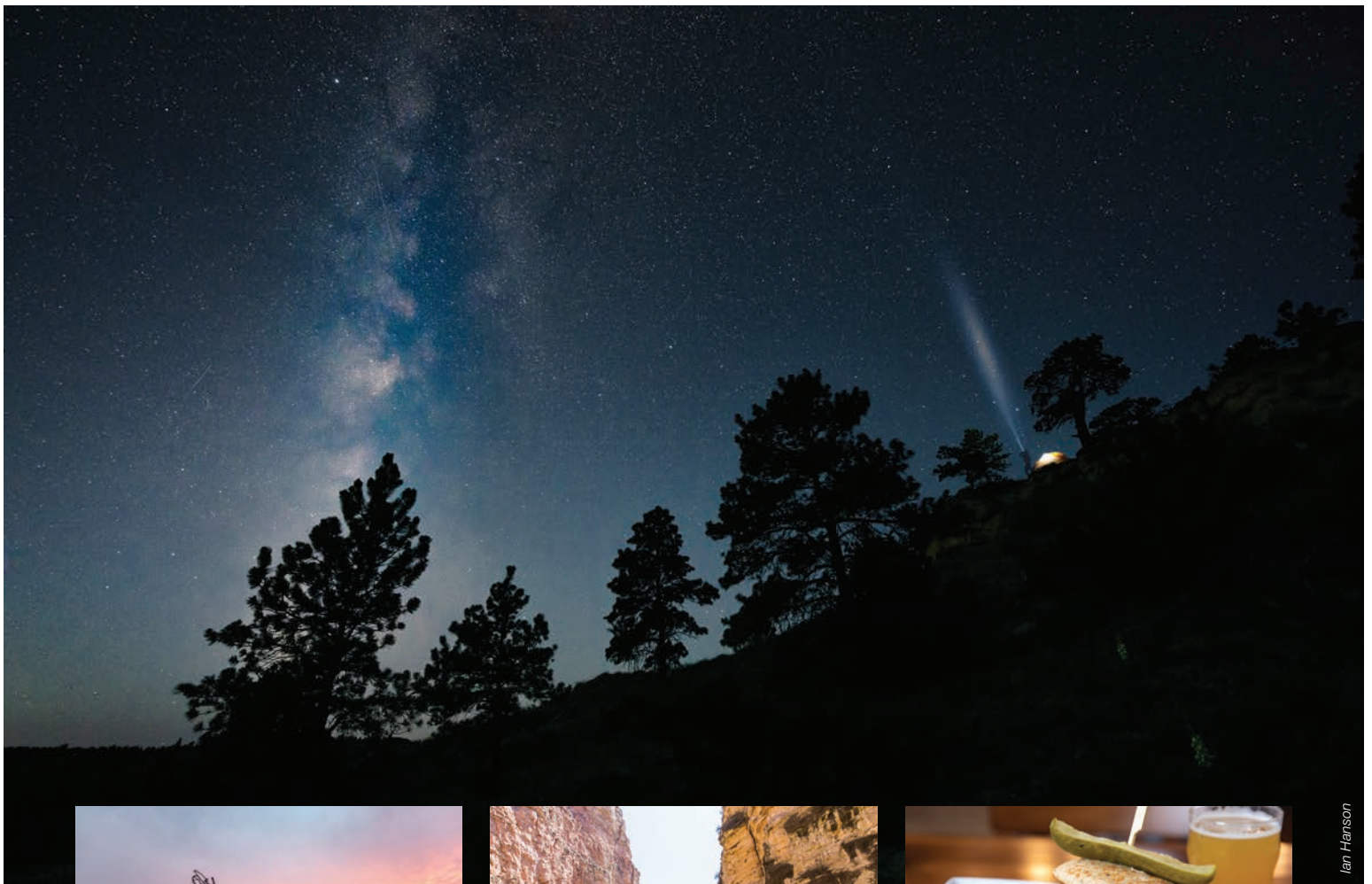


Ian Hanson



VISIT SOUTHEAST
MONTANA

SOUTHEASTMONTANA.COM | 1.800.346.1876
#OUTHEREMT | #SOUTHEASTMONTANA



Ian Hanson



Andy Austin



Nathan Satran Photography



Visit Southeast Montana

WE'RE BIG OUT HERE

That is what a visit to Southeast Montana promises. Wide-open spaces. Historical stories. Deeply-rooted traditions. And, adventures as varied as stars in the vast night skies.

Out here, Big Sky meets big adventure. It's the kind of place to slow down and fall in love with Montana. It's the kind of place where cowboys still ride horses across the open plains. It's the kind of place where dinosaur fossils are waiting to be discovered and history is rooted in the land. It's the kind of place where visitors can steep in the myriad colors of a prairie sunset and feel the drum beat that nourished the indigenous tribes for generations.

Southeast Montana is a region of complexities and juxtapositions, a land of vast, open spaces, a place of surprising twists and turns as unexpected as the flowing rivers. The region is a small portion of the Crow Tribe's ancestral land and modern-day home to the Northern Cheyenne nation. And it is ranching, spread farther than naked eyes can see, dotted with small communities more than a century old.

From the state's largest city, Billings, with its walkable downtown and expansive growth along the middle Yellowstone River, to one of the smallest towns, like Ekalaka, which created its identity from the very fossils found in the surrounding area, the Southeast Montana region offers visitors niche experiences of the real Montana.

The Yellowstone River, the longest undammed river in the lower 48 states, flows through the region, alongside I-94 to North Dakota – this is the same route that Capt. Lewis Clark used to navigate back to St. Louis, and includes his timeless signature carved into Pompeys Pillar. Today we can dare to explore the same river using the Lower Yellowstone River Trail (still under development by Montana FWP). Other rivers, like the Tongue and Bighorn, which flow north into Montana, are dammed and create recreational oases. The massive Bighorn Canyon National Recreation Area, which contains the 71-miles long Bighorn Lake (locally known as Yellowtail) beneath towering 1,000-foot-high red cliffs, dwarfs and stuns visitors with its raw beauty.

It is this ruggedness, this stark contrast of seemingly benign rolling prairies and flowing rivers that gives way to natural breaks and unexpected Eastern Montana badlands.

Created by prehistoric rivers, the Terry Badlands and Makoshika State Park badlands, hold more secrets to be discovered amongst crevices and coulees. Explore them by day or watch as the setting sun stains the land in elusive and nearly indescribable shades of mauve, pink and gold.

Nighttime provides another opportunity to be awed by Southeast Montana. Visit any one of the 40-plus locations along Montana's Trail to the Stars and be mesmerized by incredible views of stars beyond compare. Medicine Rocks State Park, located between Baker and Ekalaka, stands as the anchor site of this Trail and only one of two International Dark-Skies designated locations in the state.

Southeast Montana is rich in history, with the Little Bighorn Battlefield National Monument (operated by NPS) serving ~250,000 visitors each year. With nearly 20 museums and cultural centers, the history buff can spend days in the region. Our history maps help navigate this journey, as will the upcoming Trail to the Little Bighorn project. As a bonus, many museums are no-cost and docents are locals who love sharing the story of the community with visitors.

While dinosaurs once roamed these craggy lands, they never get old out here. From a personal dig on private property to the award-winning annual Shindig in Ekalaka, the Montana Dinosaur Trail allows both the young—and the young-at-heart—to find an experience they will treasure in Southeast Montana. Most recently, the Musselshell Museum in Roundup added a paleontological exhibit and is working to join the Montana Dinosaur Trail.

Signature events like the Miles City Bucking Horse Sale, Buzzard Day (Makoshika), Reenactment of the Battle of Little Bighorn, Roundup Independence Day Extravaganza (RIDE), Crow Fair & Powwow and NILE Rodeo bring visitors from across the globe to Southeast Montana. Newer, smaller events like Makoshika Triathlon continue to attract a more interactive and competitive crowd.

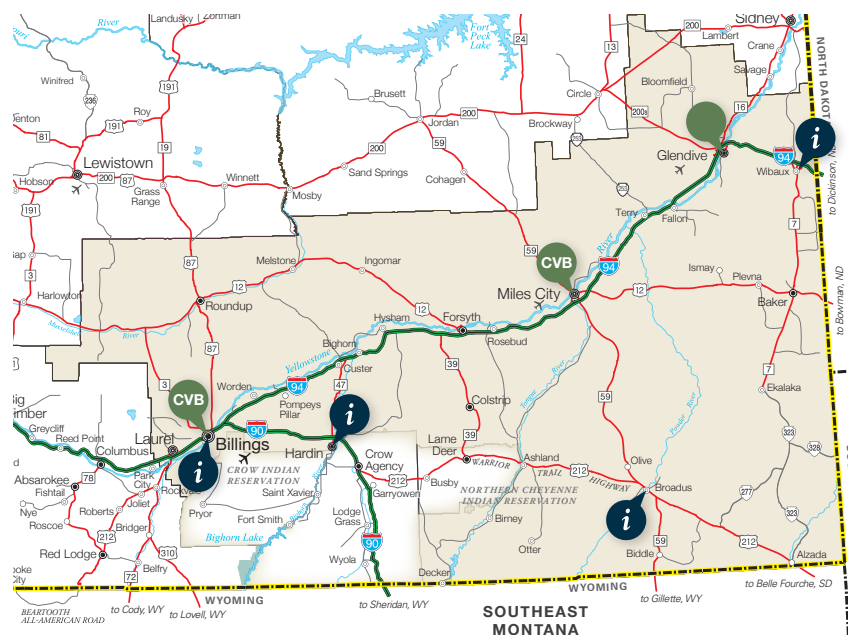
Those visiting Southeast Montana can taste Montana in nearly every town by following the Southeast Montana Burger Trail (which will be expanded with a digital application in FY24). While in Billings, the Brew Trail and newly expanded Trailhead Treats offer alternatives. Plus, the region is home to several James Beard Award nominees and winners – and not just where one would expect – also in small towns, as demonstrated at The Backporch in Roundup.

Southeast Montana is a place of **Big Space** and **Big Tastes**.



WHO WE ARE A BRIEF HISTORY

Originally called “Custer Country,” Visit Southeast Montana began in 1984 as an organization charged with helping bring tourists to the region. It was named for one of its most famous attractions, the Little Bighorn Battlefield. In 1987 the Montana Legislature enacted a 4 percent Lodging Facility Use Tax to fund tourism promotion organizations. At that time, Custer Country became one of six state-funded tourism regions in the state. This organization continued to market the 13 counties and two Indian Reservations of Southeast Montana until 2010. The Billings Chamber of Commerce received the contract from the Montana Department of Commerce to manage the region and the organization moved from Forsyth to Billings. In 2012, the Custer Country Board of Directors voted to change the name of the region to “Visit Southeast Montana.”



THE ORGANIZATION

Visit Southeast Montana is a nonprofit organization managed by the Billings Chamber of Commerce. We serve as a voice for Southeast Montana’s tourism and hospitality industries, seeking to promote the region’s many attractions, events and communities while ensuring that tourism is recognized as one of the region’s top economic drivers, especially when changes to local and state-wide legislation are considered. Visit Southeast Montana consists of two full-time staff members under contract with the Montana Department of Commerce and is directed by a board consisting of no more than 21 members from across the region. Visit Southeast Montana partners with the region’s three Convention & Visitors Bureaus (Billings, Miles City and Glendive) along with hoteliers, chambers of commerce and other tourism-related entities including state parks, county and federal organizations, plus private businesses ranging from coffee shops and restaurants to guide services, art galleries and private tour operators. The stakeholders and tourism partners of Southeast Montana provide the essence, flavor, identity and unique character of the region.



MISSION OF VISIT SOUTHEAST MONTANA:

The mission of Visit Southeast Montana is to increase tourism to Southeast Montana by increasing the awareness of our region, showcasing our cultural heritage, developing memorable experiences and educating our residents about the economic benefits of tourism.

THE MONTANA BRAND CONSISTS OF THREE PILLARS:

1. More spectacular, unspoiled nature than anywhere else in the lower 48;
2. Vibrant and charming small towns that serve as gateways to our natural wonders; and
3. Breathtaking experiences by day, and relaxing hospitality at night.

Visit Southeast Montana aligns with the Montana Brand in a plethora of ways. Makoshika State Park, Terry Badlands Wilderness Study Area and Bighorn Canyon National Recreation Area boast **spectacular, unspoiled nature**. These vast and stunning public lands are complemented with the wide-open spaces where the mountains roll out to meet the prairies and the Yellowstone River freely flows. In addition, Southeast Montana holds **historical beauty** in the Little Bighorn Battlefield and lesser-known historical locations and monuments like Rosebud Battlefield State Park, Tongue River Reservoir State Park and Four Dances Recreation Area.

We offer **vibrant and evolving small towns** – from Roundup to Baker, Forsyth to Hardin and Miles City to Baker – each with its own unique charm. Glendive is not only the gateway to Makoshika State Park, it and Wibaux, are the gateways to Montana. Crow Agency, Fort Smith and Hardin also welcome visitors to the Little Bighorn Battlefield National Monument and Bighorn Canyon. And, of course, we are the home of Billings, Montana's Trailhead – the state's largest, incredibly progressive city.

With all these options of **breathtaking experiences by day**, our visitors deserve **relaxing hospitality at night** – including the newly-launched and awarded Montana Trail to the Stars. In Southeast Montana relaxing lodging options range from the luxurious Northern Hotel in Billings to the rustic (and haunted) Kempton Hotel in Terry – the longest continually operating lodging facility in the state. Over the past year, we launched the Southeast Montana Burger Trail, with more than 20 locations in communities across the region, and two businesses – Veronika's Bakery and The Backporch in Roundup – were nominees for the prestigious James Beard Awards. Southeast Montana contains all amazing the ingredients necessary for **relaxing hospitality, Montana-style**.



Visit Southeast Montana

VISIT SOUTHEAST MONTANA'S VISION:

Visit Southeast Montana will become the trusted source for free-spirited travelers to achieve their legendary life experiences.

KEY CHARACTERISTICS

This vast region, which is blessed with a diversity of people, geography and cultures, prides itself on connecting with visitors who enjoy our very distinctive characteristics including these strengths:

- Outdoor Recreation
- Historical Significance
- Western Authenticity
- Dinosaur Adventures
- Crow & Northern Cheyenne Culture
- Interstates I-90 & I-94 funnel road-trippers into the region – and is “on the way” to YNP and GNP
- Billings – Montana’s largest city
- Wide-open spaces public lands
- Alignment with Brand MT, which has stated effort to divert visitor traffic away from national parks into all areas of Montana
- Signature Events – Bucking Horse Sale; Crow Fair; RIDE – plus new events
- Destination Development projects that are gaining momentum



Visit Southeast Montana

AT THE SAME TIME, VISIT SOUTHEAST MONTANA FACES VERY REAL CHALLENGES, INCLUDING:

- Perception that Montana is far away and difficult to travel to
- Distance between services/remote areas
- Irregular mobile phone coverage/technical infrastructure
- Regions are confusing and not applicable for travelers
- Underdeveloped tourism product(s)



Andy Austin



Visit Southeast Montana



Nathan Satran

SNAPSHOT OF MONTANA'S TARGET TRAVELER

Visit Southeast Montana parallels the **Target Market** identified by Brand MT, as identified here:



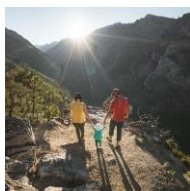
However, Visit SEMT will narrow the **geographic locations** to include:

- Direct fly markets to BIL
- Regional travelers – within 10-to-12-hour drive radius of Miles City (center of region) – and Midwestern Roadtrippers
- Travelers on way to/from Yellowstone and/or Glacier National Parks
- Western Montanans, especially outdoor adventurers

In addition, we will drill down to the niche audiences as identified by Brand MT:

Two 'high value' Brand MT target audience(s):

Affluent
Families



Educated
Travelers



Four niche audiences who have high affinity for Montana:

History
Buff



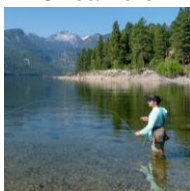
Dino-fans



Park
Enthusiasts



Field &
Streamers



This is further supported with data from **Visit Southeast Montana's 2022 Conversion Study**, which identifies Midwest Roadtrippers and direct flight markets as shown here:

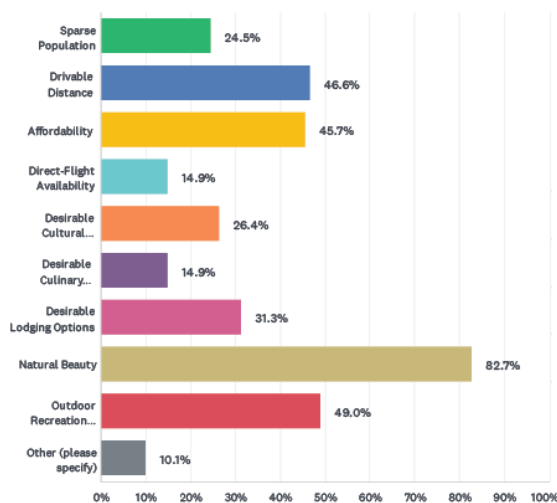
Q21 In which state do you reside?

Top 10



Additionally, the Conversion Study reinforces our understanding of the target market's desire to experience the natural beauty of Montana's wide-open spaces and outdoor recreation opportunities yet have affordable options within a "drivable distance." We also see direct-flight markets, culinary experiences and cultural experiences as factoring into a visitor's decision to visit Southeast Montana region.

Q22 Which of the following would factor into your decision on where to take your next vacation? Check all that apply.



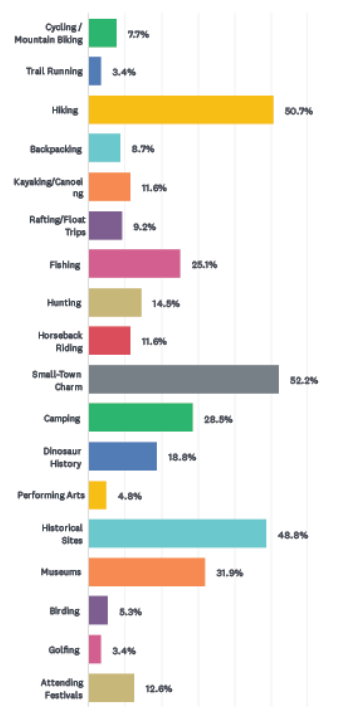
Marketing Opportunities

- Wide spaces
- Affordability
- Great lodging
- Natural beauty
- History

Lastly, we noted that potential visitors wish to hike and fish, experience small-town charm and visit historical sites and museums, as per this information from the Conversion Study:

Q23 Which of the following recreational activities interest you? Check all that apply.

History • Small Town Charm
Outdoors • Events



NOTE
Outdoor activities better defined in messaging potentially.



- In addition, we have identified the following Emerging Markets:
- Outdoor Recreationists:
 - Specifically, water sports like kayaking and rafting
 - Lower Yellowstone River water-based trail (FWP is continuing to build out)
 - Night Sky Observers/Astrotourism, and
 - Culinary Travelers in support of the Southeast Montana Burger Trail (which received an EMI grant to add a digital passport program) along with Visit Billings' Brew Trail and Trailhead Treats Trail



ADDITIONAL CONSIDERATIONS

As we look to FY24, we will also consider the following dynamics:

- We are planning now (spring of 2023) for consumer decisions 6-12 months from now. To remain flexible, we will follow Destination Analysts and other research resources available through Brand MT for the most up-to-date data.
- Can't "sell" what we don't have (i.e. Sustainable Travel) – but we can start those conversation with our tourism partners as we develop additional destination products
- Fuel prices/travel costs shifting rapidly

We plan to execute a second Conversion Study again in fall of 2023, looking for trends, new data and comparative data. Lastly, we will look to our Agency of Record, Windfall Studio, to access low- to no-cost data, travel trends and other professional expertise that applies to Visit Southeast Montana's goals.

WHAT IS THE STRATEGIC ROLE OF VISIT SOUTHEAST MONTANA AS A DMO?

We are primarily a **Destination Marketing Organization** (~75%), with basis in promoting regional visitation. At the same time, we are also a **Destination Development Organization** (~25%).

As we evolve into this dual identity, we will look for, develop and market regional assets. Montana's Trail to the Stars & Montana's Dinosaur Trail are both strong examples of tourism product development in this region. The former was named 2022 Campaign of the Year at the 2023 Montana Governor's Conference on Tourism and Outdoor Recreation.

This combination allows us – and our tourism partners – to identify and grow "products" that are unique to this corner of Montana, including the Badlands to Breaks to Beartooths (working title) road-trip project, for which Visit Southeast Montana was awarded a tourism grant, that will route roadtrippers amongst these three major segments of natural beauty across the eastern third of Montana.



DESTINATION DEVELOPMENT

In FY24 we will utilize a grant from the Eastern Montana Tourism Initiative to expand the one-year-old Southeast Montana Burger Trail by adding a digital passport, print and distribute more maps, elevate with paid advertising and promote with a participation contest.

We are also the lead on a new project, Badlands to Breaks to Beartooths (working name), which will route road-trippers between these three distinctive land features of Eastern Montana. The project is funded by a Montana Tourism Grant and includes four regions (Yellowstone Country; Missouri River Country; Central Montana; and Visit Southeast Montana) and is massive undertaking. We expect the project to launch in March/April of 2024.

All our goals support our Destination Development efforts, but specifically Goal #1 (dedicate 5% of paid media budget to destination development projects) and Goal #5 (connecting with tourism partners at a local level) demonstrate how our destination development work melds with marketing work.

In addition, the Visit Southeast Montana Board of Directors (Executive Board) is planning a retreat for fall of 2023, at which we will specifically explore new strategies to support visitor services across the region. In the past, we have provided grants to (3) VICs; however, the Board wants to have a more broad impact in all regional communities (current budget includes a \$100 placeholder; will adjust budget after retreat and audit using rollover funds).

OVERALL MARKETING STRATEGY

Visit Southeast Montana strives to increase awareness of and visitation to the Visit Southeast Montana region as a destination for outdoor recreation, historical significance and dinosaur adventures along with Western authenticity plus Crow and Northern Cheyenne culture, as desired by each tribe.

We will follow the Montana Brand while elevating Visit SEMT's pillars and destination development projects to targeted audience, while simultaneously working with tourism partners within the region to grow regional pride and identity, tourism products and awareness.

Visit Southeast Montana will continue website renovation (started in FY23) and enhancements to strengthen this core marketing component while adding Destination Development elements and video content. We will specifically target content, like the e-newsletter and travel guide orders, to those already interested in visiting GNP by utilizing a new partnership with the Glacier National Park Conservancy. In addition to our foundational and strategic paid media plan, we will promote our Destination Development projects, specifically: Montana Dinosaur Trail; Montana's Trail to the Stars; Southeast Montana Burger Trail; and Trail to the Little Bighorn. And we will continue to support our regional partners, functioning as the conduit between Brand MT and all the communities of Visit Southeast Montana region. Lastly, we will again survey visitors and potential visitors in the fall of 2023 glean insights and trends specific to the Visit Southeast Montana region. We will execute the FY24 Marketing Plan with these strategic objectives and goals:



STRATEGIC GOAL #1

Continue to utilize paid advertising to elevate Visit Southeast Montana's pillars while advancing existing Destination Development projects:

OBJECTIVE 1: Maintain minimum paid media budget of \$150K for pillars and Destination Development projects.

OBJECTIVE 2: Elevate Destination Development projects by dedicating 5% of paid advertising budget (\$7,500) to each of four Destination Development projects (for a total of \$30K):

- Montana Dinosaur Trail
- Montana's Trail to the Stars
- Southeast Montana Burger Trail, and
- Trail to the Little Bighorn

METRICS: This method will be considered a success if we increase the effectiveness of paid media by increasing impressions and engagement (CTR, etc.) by 10% in FY24 over FY23.



STRATEGIC GOAL #2

Continue to add to online content on Visit Southeast Montana's owned channels and non-owned channels (earned media) and use this to drive traffic to southeastmontana.com.

OBJECTIVE 1: Gather and create more seasonal content (images, video, copy) and add seasonal content to the website; execute additional photo/video shoot to increase fall photo library by at least (15) images.

OBJECTIVE 2: Maximize editorial calendar by writing and distributing (1) news release per month.

METRICS: We will use Google Analytics to track, modify and measure traffic to southeastmontana.com; if we increase traffic by 10% in FY24 over FY23 we will consider this method a success.



STRATEGIC GOAL #3

Connect with visitors who are already planning to visit YNP and/or GNP to elevate the Southeast Montana region as an option on their way to/from the parks.

OBJECTIVE 1: Generate 7,000 new leads by partnering with GNP Conservancy Call Center.

OBJECTIVE 2: Increase reach to YNP travelers and gather 3,000 new email addresses by partnering with *Yellowstone Journal* or similar.

METRICS: We will note number of e-blast subscribers on July 1, 2023 with success objectives increasing that number by at least 10,000 subscribers in FY24.



STRATEGIC GOAL #4

Utilize new call center to increase understanding of our visitors by executing a survey every fall with a minimum of 230 responses.

OBJECTIVE: Execute conversion study of at least 230 participants. Compare results with study from 2022.

METRICS: This method will be successful when we execute the Survey to at least 230 visitors and present the results to the Board at the Jan/Feb 2024 meeting, in advance of FY25 planning.

STRATEGIC GOAL #5

Connect with more tourism partners across the region to become the resource for destination development and tourism marketing.

OBJECTIVE 1: Host at least (5) regional roundtables in FY24.

OBJECTIVE 2: Increase reach (open rate) of weekly e-blasts to tourism partners by 1.5% over FY23 and add 40 additional subscribers to e-blast list (from what is in database on July 1, 2023).

METRICS: This method will be successful if at least (3) tourism partners, in each of (5) communities attend the roundtables and have one-on-one conversations with staff and Board members.



VISIT SOUTHEAST MONTANA MARKETING PLAN BUDGET

July 1, 2023 – June 30, 2024

The FY24 Marketing plan will operate within the following budget *[updated October, 2024]*

REVENUE	
Estimated Bed Tax Revenue	\$821,154
Predicted Rollover	\$363,891
Rollover at MOTBD	\$3,154
Total Revenue	\$ 1,188,199
EXPENSES	
ADMINISTRATION	\$164,862
JOINT VENTURES	
BIL direct CA flight marketing	\$25,000
State JVs	\$35,000
other JVs	\$15,000
Total Joint Ventures	\$75,000
OPPORTUNITY MARKETING	\$115,000
COOPERATIVE MARKETING	\$20,000
MARKETING PERSONNEL	\$120,500
AGENCY SERVICES	\$105,000
MARKETING RESOURCES	\$8,000
PAID MEDIA	
Multimedia Advertising	\$170,123
OOH	\$35,100
OTT	\$100
Broadcast	\$100
Digital Advertising	\$100
Social Media	\$27,814
Electronic Advertising (e-news)	\$7,000
Print products, brochures, etc.	\$10,000
Digital Assets	\$50,000
Sweepstakes/Promotional Items	\$5,000
Total Paid Media	\$305,337
EARNED MEDIA/TOURISM SALES	
Media Trips	\$15,000
Fam Tours	\$15,000
Crisis Communications	\$100
Total Earned Media/ Tourism Sales	\$30,100
WEBSITE DEVELOPMENT	
Retainer	\$30,000
Website Content Collection/Creation	\$10,000
Website renovation	\$45,000
Total Website Development	\$85,000
EDUCATION/OUTREACH	
Workshop/Ed Programs	\$4,000
VIC Training	\$100
Professional Training	\$8,000
TAC Meetings/Gov Conf	\$4,000
Voices of MT Tourism	\$2,000
Board Meetings	\$2,500
Total Education/Outreach	\$20,600
TRAVEL/TRADE SHOWS	
RMI	\$3,000
Optional Show	\$100
Total Travel/Trade shows	\$3,100
RESEARCH	
Visitor Survey	\$12,500
Other Research	\$100
Total Research	\$12,600
PRODUCT DEVELOPMENT	
Asset & Content Collection	\$12,500
Destination Development	\$15,000
Social Media	\$10,000
Total Product Development	\$37,500
VISITOR SERVICES	
Fulfillment by Contractor	\$30,000
Call Center	\$25,000
Postage	\$9,500
VIC Funding	\$21,100
Total Visitor Services	\$85,600
Total FY24 Marketing Budget	\$1,188,199

APPENDIX:
SUMMARY FROM VISIT SOUTHEAST MONTANA'S FY23 CONVERSION STUDY
– COMPLETED IN CONJUNCTION WITH WINDFALL STUDIO

SOUTHEAST MONTANA TOURISM

2023 CALL CENTER/WEBSITE VISITOR CONVERSION STUDY RESULTS

VISITOR SATISFACTION SCORED VERY HIGH

- Highest “Yes” score for actually visiting the region based on initial inquiry or web visit.
- Impressive and unusual range of recent and past visitors responded to the survey.
- Many historical responders showed a behavior to visit specific Montana locations consistently and it was important to include SEMT in those trips.
- Enjoyment of the region led to 37% claiming to make a location in region their base and 33.6% stated they would travel over 176 miles from their base to explore.
- Travel materials produced were used and appreciated. Not a single complaint or mention of missing information for trip planning.
- Memories were positive of trip and lots of diversity in experiential feedback.
- Post-pandemic travel experiences may have boosted a feeling of SEMT as a “safe” place to visit.
- 88% were likely to suggest the region to friends and family.
- 98% would visit the region again.

VISITOR LENGTH OF STAY TRUE OPPORTUNITY

- Visitors who made it to the region showed a higher number stayed beyond the typical “pass-through day”.
- Many responses showed SEMT was included in a wider “Bundled Montana” experience.
- Heavy drive focus provided higher flexibility in trip direction and duration.
- Historical sites and greater awareness of natural beauty and outdoor recreation spots was valued by this audience.
- Many wished for more time to see the small towns, historical sites and outdoor adventure spots.
- Many said fall was a potential time they would come again or advise others to come based on the weather and opportunities.

ADVERTISING MESSAGING AND STRATEGY SYNCING WITH CONSUMER RESPONSE

- Wide-open spaces are loved by a wide geographic audience.
- Bundled marketing with other regions is highly effective and beneficial.
- Marketing product developments (MonDak Motorcycle Loop, Trail to the Stars, etc.) resonates with this audience.
- Audience digital targeting that aimed on behaviors of states acting as original destinations as well as final destinations for trips proved to be consistent with what was captured in responses.
- Visitor guides, maps, and websites were highly effective in providing applicable messaging and information.
- Wide-open space, family friendly, natural beauty, accounted for most of the reasons inquiries ended up in SEMT.

BUDGET A LARGER FACTOR

- Higher than usual response (41%) mentioned budget being impactful on future trips to region.
- Direct flight availability scored lower compared to industry peers.

ACCOMMODATIONS AND SITE DEVELOPMENT / AWARENESS NEEDED

- 21% responded that lack of lodging and amenities pushed them to another destination.
- Perception that lodging and attractions are “too far apart” was mentioned by 37% who went elsewhere.

OTHER VALUABLE TAKEAWAYS:

- Strong Midwest and Pacific Coast block visitation.
- Response group trended older but some concern over people not being honest in age responses. Need to adjust future question layout to help.
- High number of respondents from Florida and Georgia shows an impressively wide geographic response rate.
- The use of outside trip planning sources online suggests a focus on content development to social media, search engines, and other trip planning sites is valuable to this audience and should continue.
- Park-to-park visitor themes across the responses suggest major marketing focus should continue. Motorcyclists showed up in responses.
- SEMT is perceived as being full of authentic people.
- RV campers and others with flexible travel opportunity respond well to our messaging.

THE SEMT TARGET RESPONDER:

- Road trippers (cars, RVs, motorcycles)
- Small-town charm enthusiasts
- Utilize available travel materials and plan their journey
- Appreciate the outdoors and authentic outdoor experiences
- Highly budget focused
- Planners but have some flexibility in trip direction and duration
- Enjoy wide-open spaces as long as they can find what they need
- Appreciate activities and events that are family friendly
- Multiple generations traveling together



Kevin League