



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. Cowboys still ride horses across the open range, dinosaur fossils rest beneath the surface waiting to be discovered, and history lives in every curve of the land. Visitors can watch the sky shift with the colors of sunset and feel the rhythm of a landscape that has sustained Indigenous cultures for generations.

NOWHERE BETTER

Some might say Southeast Montana is nowhere near anything else. We say, when NOWHERE is full of awe-inspiring sights of beauty, history, culture and adventure, there's NOWHERE BETTER to discover the real Montana.



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 (Apsáalooke) ancestral land and modern-day home to the Crow Tribe's (Apsáalooke) nation. It is ranching, spread farther than the naked eye can see, dotted with small communities more than a century old, many of which are experiencing rejuvenation and growth.

From Billings—Montana's largest city with a vibrant downtown and steady growth along the Yellowstone River—to small town of Ekalaka, where the town's identity is shaped by the fossils found in its surrounding hills, Southeast Montana delivers authentic, place-based experiences that reflect the true spirit of the state.

The Yellowstone River—the longest free-flowing river in the lower 48—winds through the region alongside I-94 toward North Dakota, tracing the same path Captain William Clark followed on his return to St. Louis. Along the way, his carved signature remains etched into history at **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-mile-long Bighorn Lake (locally known as Yellowtail) beneath towering 1,000-foothigh red cliffs, 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 among crevices and coulees. Explore them by day or watch as the setting sun stains the land in 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 a stellar view 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.

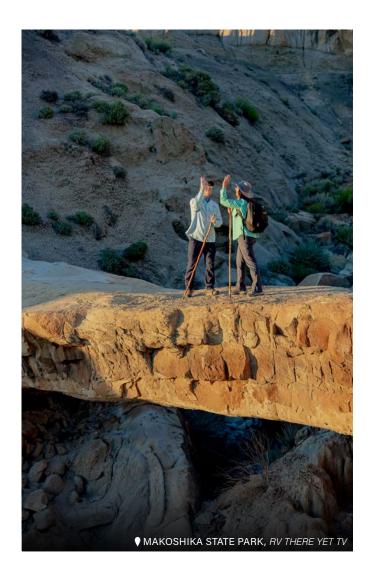
Southeast Montana is rich in history, with the **Little Bighorn Battlefield National Monument** (operated by NPS) serving ~250,000 visitors each year. With nearly 20 museums and cultural centers, the history buff can spend days in the region. **Our history maps** help navigate this journey, as will the 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, to the Montana Dinosaur Trail, both the young and the young-at-heart find—to find an experience to 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 the 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—but also in small towns, as demonstrated at **The Backporch** in Roundup.

Southeast Montana is a place of Big Space and Big Tastes—and we say, there's **Nowhere Better**.



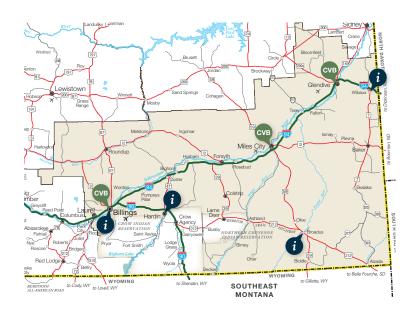




WHO WE ARE

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 Montana. 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."



MISSION

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.

VISION

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

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 fulltime 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 tourismrelated 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.

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 by 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 more than just the gateway to Makoshika State Park—it, along with Wibaux, marks the eastern gateway to Montana itself. Crow Agency, Fort Smith and Hardin also welcome visitors to the Little Bighorn Battlefield National Monument and Bighorn Canyon. And, of course, we're home to Billings—Montana's Trailhead and the state's largest city, known for its forward-thinking spirit and steady growth.

▼YELLOWSTONE RIVER, NATHAN SATRAN PHOTOGRAPHY

With all these options of **breathtaking experiences** by day, our visitors deserve relaxing hospitality at night-including the newly-launched and awarded Montana's Trail to the Stars. In Southeast Montana relaxing lodging options range from the luxurious Northern Hotel in Billings to the rustic, historic (and haunted) Kempton Hotel in Terrythe longest continually operating lodging facility in the state. We recently launched the Southeast Montana Burger Trail passport, 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 the amazing the ingredients necessary for relaxing hospitality, Montana-style.



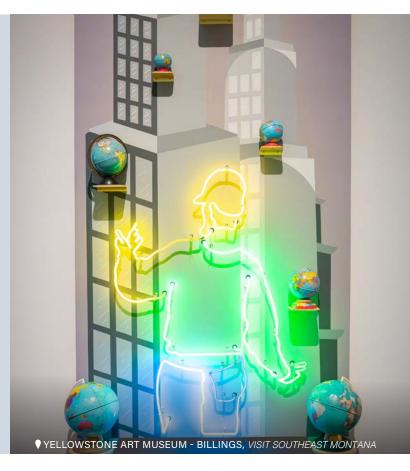
KEY CHARACTERISTICS

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 (first five are regional pillars):

- · Outdoor Recreation
- · Historical Significance
- Western Authenticity
- Dinosaur Adventures
- Indigenous Cultures [Crow and Northern Cheyenne]
- Wide-open spaces and a plethora of public lands including two national monuments and eight state parks
- Signature Events—Bucking Horse Sale, Crow Fair, RIDE, Dino Shindig—plus new events
- Interstates I-90 & I-94 funnel road-trippers into the region, which is "on the way" to YNP, GNP, Mount Rushmore National Monument and Theodore Roosevelt National Monument with Bighorn Battlefield National Monument a desired NPS stop
- Billings—Montana's largest city
- · Year-round and seasonal direct flights
- · The region has not yet reached tourism capacity and has room to grow
- Destination Development initiatives that are gaining momentum, such as Southeast Montana Burger Trail; Montana's Trail to the Stars; Montana's Great Wide Open; and existing Montana Dinosaur Trail
- Alignment with Brand MT, which has stated effort to divert visitor traffic away from national parks into all areas of Montana

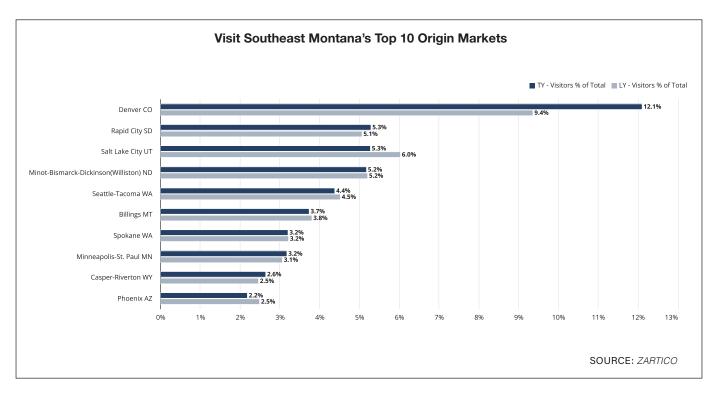
AT THE SAME TIME, VISIT SOUTHEAST MONTANA FACES VERY REAL CHALLENGES, INCLUDING:

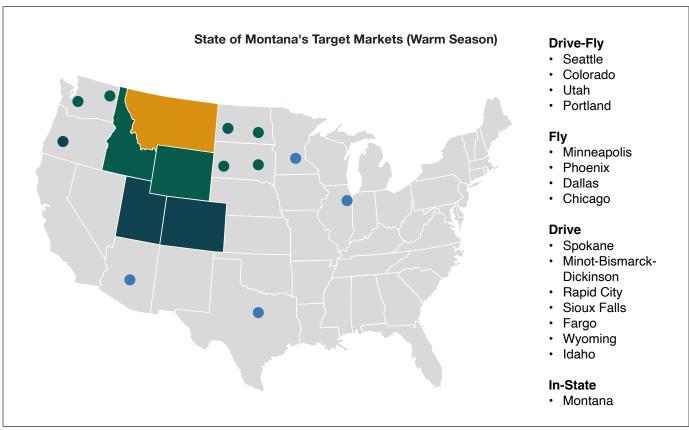
- National and international political and economic factors and softening spend
- Perception issues that Montana is far away or difficult to access, or that the state is only about mountains, which our region does not feature
- Little Bighorn Battlefield renovations will restrict access to the region's most visited attraction
- Distance and remoteness, including limited services and long travel times between destinations
- Irregular mobile service and broadband limitations, especially in rural areas
- Perception that tourists might not be welcome in small communities
- Underdeveloped tourism product: a lack of formal tours, tour operators and bookable experiences



TARGET AUDIENCE

Visit Southeast Montana's target markets will align with some of the top 10 origin markets shown below—as well as those that match markets recognized by the State of Montana's marketing program—to increase our reach in geographic areas that show potential for the highest return on investment.







Visit SEMT will additionally narrow down the **geographic locations** to include:

- 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 adventurists
- · Direct-fly markets to Billings Logan International Airport

Visit Southeast Montana's Call Center tracks both Top States of Origin and Top Areas of Interest, as shown here:

Top 5 States	Top 5 Interests

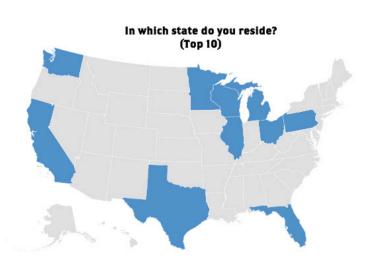
Wisconsin
 Scenic driving

Texas
 Wildlife
 Florida
 History

4. Illinois 4. Little Bighorn Battlefield

5. Ohio 5. Lewis & Clark Trail

Visit Southeast Montana's annual survey also asks the same questions of its participants with similar results. The figure to the right illustrates the top 10 states from these two sources, while the interests chart on the following page captures the responses received in the survey.

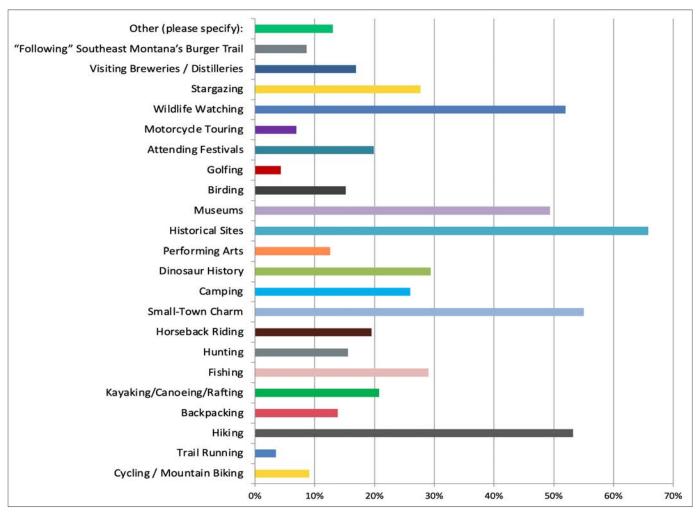


While both ITRR and Visit SEMT's Survey data indicate that most travelers to the region are over age 45, with 56 being the average age, there is a large opportunity to reach targets under age 45. Additionally, we will target those whose behavior matches both Montana's Brand and Visit Southeast Montana's pillars and available activities, such as:

- Scenic driving
- Visiting historic sites, including Little Bighorn Battlefield and Lewis & Clark sites
- Wildlife watching and/or photography
- · Visiting small towns
- Outdoor recreation activities such as hiking, biking, kayaking/canoeing, stargazing, camping, and fishing



Which of the following recreational activities interest you? (check all that apply)



SOURCE: 2025 SEMT VISITOR SURVEY

We also note that according to American Express Travel Research, 84% of those surveyed are looking for a "first-time" destination and 67% are focused on finding lesser-known destinations. Both descriptions fit the Southeast Montana region and will play into website and keyword optimization strategies.

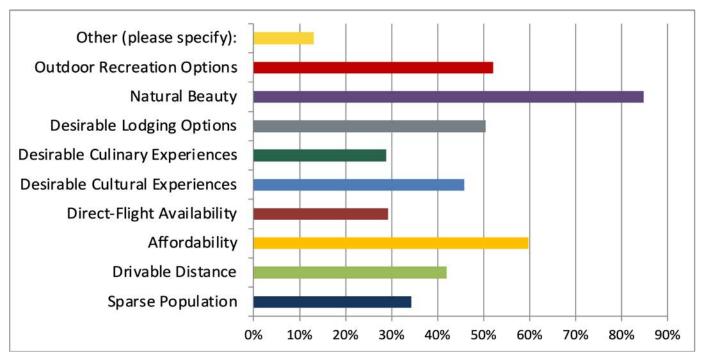
SOURCES

Research from ITRR's 2024 Nonresident Visitor Surveys, Visit Southeast Montana's 2024 Visitor's Survey and data from Visit Southeast Montana's Call Center all support Visit Southeast Montana's strategy as, noted above.

We found compelling insights from the most recent visitor surveys. In Visit Southeast Montana's 2024 Visitor Survey, 92% of respondents said they would visit the region again, and nearly 76% were "very likely" to recommend it to a friend. Even more encouraging, the 2025 survey showed a 6-point increase in the percentage of repeat interest—with 98% of visitors now saying they want to return. This upward trend reinforces the value of re-targeting previous visitors as a key marketing strategy.

Those who decided to not travel to the region cited "destinations were too far apart" and "cost of travel" as reasons for their decisions. Knowing what factors into the decision-making process is helpful and, with two of the top three—natural beauty and outdoor recreation options—aligning with the Southeast Montana region, as shown below.

Which of the following would factor into your decision on where to take your next vacation? (check all that apply)



SOURCE: 2025 SEMT VISITOR SURVEY



Lastly, the same SEMT Visitor Survey asked "What would you tell a friend" and "What surprised you the most about Southeast Montana." We found the varied responses interesting (and encouraging), with nearly all including positive feedback, such as the following:

WHAT WOULD YOU TELL A FRIEND ABOUT SOUTHEAST MONTANA?

"Be prepared to be awed. Everyone thinks the plains are colorless, but there's so many beautiful colors that you don't realize until you go out and see."

"Take the grandchildren."

"Breathtaking. Took over 10,000 pictures."

"You have to see it to believe it. It's God's country ... better than Colorado."

WHAT SURPRISED YOU ABOUT SOUTHEAST MONTANA?

"The freedom. The absence of overcrowded cities, roadways, truly a beautiful place to be. I can't wait until I can return."

"Didn't have enough time! Spent 12 days."

"How beautiful the stars are and how many you can see."

"It's a good airport, shopping—but still has small-town friendly people"



EMERGING MARKETS

We continue to pursue previously identified emerging markets of:

- 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 (as own niche market, outside of "outdoor recreation")
- Culinary Travelers in support of the Southeast Montana Burger Trail along with Visit Billings' Brew Trail and Trailhead Treats
- Visitors from direct-fly markets and topperforming origin DMAs (North Dakota, South Dakota, Colorado, and Wyoming), where outof-state cardholders represent 44.1% of total spend and average \$347 per transaction—a 16% increase over the previous year'

In addition, we will watch for the "multigenerational" market, in which grandparents travel with grandchildren. This market specifically matches products like the Montana Dinosaur Trail and the outdoor recreation pillar, including RV travel.

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

Visit Southeast Montana is 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 have evolved into this dual identity, we intertwine the destination development projects into the overall marketing campaign, specifically:

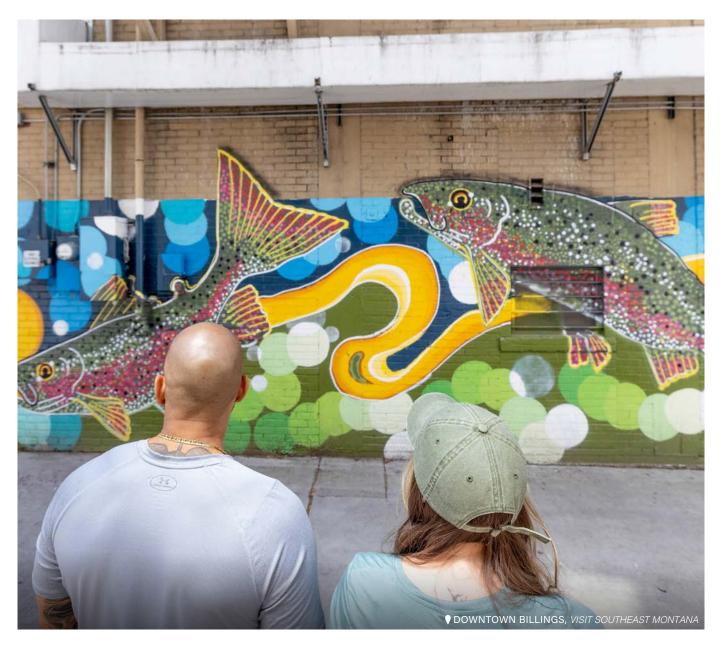
- Montana Dinosaur Trail (since 2005)
- Montana's Trail to the Stars
- · Southeast Montana Burger Trail
- · Visit Billings' Brew Trail and Tasty Treats Trail
- · Montana's Great Wide Open: Badlands to Breaks to Beartooths



Using this integrated approach, when we host a blogger or influencer (for example), we'll include stops at one or more Burger Trail locations, along with experiences from the Montana Dinosaur Trail, Trail to the Stars, or other offerings that align with their interests. Each featured product will also receive direct support through paid advertising.

This strategy allows us—and our tourism partners—to identify, develop and promote experiences that are unique to this corner of Montana. In a state filled with distinctive landscapes from border to border, these tailored offerings are designed to resonate with both road-trippers and fly/drive travelers.

As we move into the FY26 marketing plan, we will add Destination Management to the list with expansion into a region-wide Tourism Ambassador program. The board does not see Destination Stewardship as a top priority at this time; however, that could shift in the future.



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 audiences, while simultaneously working with tourism partners within the region to grow regional pride and identity, tourism products and awareness.

We will continue to support our regional partners, functioning as the conduit between Brand MT and all the communities of the Visit Southeast Montana region. Lastly, we will again survey visitors and potential visitors in 2026 to glean insights and trends specific to the Visit Southeast Montana region.

In FY26, Visit Southeast Montana will focus on building out from strategic goals, such as creating and sustaining a tourism ambassador program across the region, and to support tourism partners and events, specifically communities and events that receive grants from the Department of Commerce, while also elevating specific products like the Montana Dinosaur Trail and the Southeast Montana Burger Trail. We will execute the FY26 Marketing Plan with the following strategic objectives and goals.

INCREASE ANNUAL VISITATION

OBJECTIVE 1:

Develop and implement marketing initiatives that result in an increase in lodging tax revenue across FY26

METRICS:

2% increase in lodging tax revenue in FY26



INCREASE AWARENESS OF SOUTHEAST MONTANA'S HISTORICAL, CULTURAL AND RECREATION ATTRACTIONS THROUGH DESTINATION DEVELOPMENT PRODUCTS OBJECTIVE 1:

Develop and implement new content and targeted marketing initiatives for the Montana Dinosaur Trail, Southeast Montana Burger Trail, Montana's Trail to the Stars and Montana's Great Wide Open.

OBJECTIVE 2:

Provide communications support to the National Park Service during 2025/2026 Little Bighorn closures.

METRICS:

- · Number of new web pages created
- Engagement metrics (sessions, time on page, CTR)
- · Paid media spend dedicated to DD products
- · Website traffic to DD-specific pages



INCREASE AWARENESS OF REGIONAL EVENTS

OBJECTIVE 1:

Promote events in smaller communities and those receiving Department of Commerce grants.

METRICS:

- Average monthly number of event listings on SoutheastMontana.com
- Engagement (page views, time on site, social shares)
- · Earned media mentions of events



SUPPORT LOCAL BUSINESSES AND ORGANIZATIONS IN GROWING THE TOURISM ECONOMY

OBJECTIVE 1:

Ensure the tourism ambassador program meets expected milestones for Year One.

OBJECTIVE 2:

Support local partners with content assessments and strategy development.

METRICS:

- · Completion of Phase I of ambassador program by end of FY26
- · Number of businesses supported with content strategy
- Number of resources/tools created/distributed



VISIT SOUTHEAST MONTANA FY 26 MARKETING BUDGET JULY 1, 2025 - JUNE 30, 2026

The marketing plan will operate within the following budget.

Total Travel / Trade Snows	\$9,
Optional Show Total Travel / Trade Shows	\$ • \$9 ,
RMI Ontional Show	
IPW	\$9,0
Travel / Trade Shows	
Total Education / Outreach	\$30,
/oices of MT Tourism	\$2,
Regional Outreach FAC Meetings / Gov Conf	\$10, \$3,
Professional Training	\$8,0
Board Meetings	\$7,
Education / Outreach	
	,
otal Website Development	\$59 ,
Vebsite Content Creation Vebsite Renovation	\$7, \$10,
Retainer Nebsite Content Creation	\$42,
Website Development	
otal Earned Media / Tourism Sales	\$56 ,
Crisis Communications	\$
Social Media / Content (Influencers)	\$29,
Fam Tours	\$7,
Earned Media - Windfall	\$14,
Earned Media - Staff	\$5,
arned Media / Tourism Sales	
otal Paid Media	\$305,
weepstakes/Promotional Items	\$5,
rint products, brochures, etc.	\$10,
fultimedia Advertising	\$252,
roadcast / LBBNM Ad Support	\$
Electronic Advertising (e-news)	\$3,
∤aid Media Digital Assets	\$35,
lated Mandita	
larketing Resources	\$5,
Agency Services	\$140,
Marketing Personnel	\$128,
Cooperative Marketing	
Opportunity Marketing	\$41,
None and control to the control to a	0.44
otal Joint Ventures	\$80,
Other JVs	\$25,
tate JVs	\$30,
pint Ventures IL direct CA flight marketing	\$25.
dministration	\$196,
XPENSES	
OTAL TILVEROL	Ψ1,102,
tollover at MOTBD OTAL REVENUE	\$1,162,
	\$180,
redicted Rollover	\$59,

APPENDIX

VISIT SOUTHEAST MONTANA 2025 VISITOR SURVEY SUMMARY

10 KEY TAKEAWAYS

Visitors who named Southeast Montana as the primary destination for their planned trip increased 5 percentage points over 2024.

• 2025 Study: 45%

• 2024 Study: 40%

The 2025 Study also revealed an 8-point decline in the number who stated they "just passed through the region," showing more interest in spending additional time within the region.

• 2025 Study: 20%

• 2024 Study: 28%

Visitors surveyed spent more time in the region, showing growing interest and opportunity for vacation experiences in the region.

• 2025 Study: 74%

• 2024 Study: 66.5%

Visit Southeast Montana's visitor guide was used by 8% more of the surveyed visitors compared to prior year, with fewer visitors having trouble finding the guide or other Visit Southeast Montana travel resources.

• 2025 Study: 44%

• 2024 Study: 36%

Visitors surveyed showed a 10-point increase in the response that they would be "likely to very likely" to suggest a friend visit the region.

• 2025 Study: 88%

• 2024 Study: 78%

(6) The 2025 Study showed a 6-point increase in the percentage of visitors wanting to visit the region again.

• 2025 Study: 98% • 2024 Study: 92%

Visitors stating that they requested information but did not visit shared the following: **(7)**

• 38%: Trip was delayed one year

• 20%: Trip was delayed without a new date set • 2%: Visited outside the United States

• 17%: Visited other places in Montana

• 13%: Visited other places in the United States

• 9%: Cancelled trip completely

• 1%: Unknown

Top 5 states of survey respondents: **(8)**

• Texas: 11.7%

• Minnesota: 9.6%

• Wisconsin: 9.6%

• Washington: 7.5%

• California: 6.9%

(9) Visitors surveyed stated these attributes as the most important in trip destination selection:

Natural Beauty

Affordability

Outdoor Recreation Options

• Desirable Lodging Options

• Desirable Cultural Experiences

(10)Visitors surveyed listed these activities as their top interests for the next trip:

Historical Sites (+21 to prior year's survey)

Small-Town Charm (+20 to prior year's survey)

Wildlife Watching

Museums (+16)



