

# Application Summary

**Application:** FY25 DMO Plan

**Applicant:** Yellowstone Country Montana, Inc.

**Funding opportunity:** FY25 DMO Plan

## Application Responses

**Organization Name:** Yellowstone Country Montana, Inc.

**First Name:** Robin

**Last Name:** Hoover

**Street Address 1:** PO Box 3048

**Street Address 2:**

**City:** Bozeman

**State:** MT

**Zip:** 59772

**Funding Opportunity:** FY25 DMO Plan

**Amount Requested:** 4000000

## General Description Information

**1. Describe your destination (who you are, who you wish to attract and why would they come) addressing your strengths, opportunities, and potential challenges.:**

**1a. Destination:**

**Who We Are:**

**Organization-** Yellowstone Country Montana, Inc. (YC, YCMI, Montana's Yellowstone Country) is the recognized DMO organization formed to promote the five-county region (Gallatin, Park, Sweet Grass, Stillwater, and Carbon) of Montana as a year-round destination to resident and nonresident visitors.

**Purpose:** Since its inception, the primary purpose for the organization has been marketing. However, in today's changing world, there's been a significant shift in the roles and responsibilities of DMOs. While marketing continues to be a key role, we recognize the necessity of also collaborating with other stakeholders in the realm of destination management, development, and stewardship to ensure that we protect our assets for the future. To that end, we will be adding campaigns, programs and partnerships identified in our Resiliency Strategic Planning Process; these will help us to achieve sustainability for the tourism industry.

**Who We Wish to Attract:** High-value, low-impact travelers who seek an authentic sense of place experience in our destination, while also respecting our residents, assets, and way of life.

**Why They Come:** *The Yellowstone Country Differentiator*—**YELLOWSTONE IS MORE THAN A PARK. IN MONTANA, IT'S AN ENTIRE COUNTRY!** It's the "Beyond Yellowstone" experience that abounds throughout the YC region.

We live in a special place. Simply being the region that borders Yellowstone National Park would be enough to make that claim – but there's so much more. Throughout the entirety of what we call Montana's Yellowstone Country are landscapes and experiences that can forever change those who encounter them.

## 1b. Strengths:

### STRENGTHS

- **Yellowstone National Park:** America's first national park, anchor to Montana's Yellowstone Country region.
- **YNP Gateway Communities:** Three of the five entrances to Yellowstone National Park are in Montana's Yellowstone Country region, including the only year-round entrance at the North entrance in Gardiner, the Northeast Entrance at Cooke City-Silver Gate and the most-accessed West Entrance at West Yellowstone.
- **Scenic Drives:** Picturesque routes take travelers up to high mountain vistas, along country backroads, and winding through our charming communities.
- **Beartooth All-American Road:** Once dubbed the "most beautiful highway in America" by an early travel/brand influencer, this epic drive continues to be a major attraction, and a destination of its own importance.
- **Alpine Ski Resorts:** Bridger Bowl, Big Sky and Red Lodge Mountain are three of the top ski resorts in the state.
- **World-Renowned Snowmobile Areas:** Cooke City, West Yellowstone, Gallatin River Corridor
- **Nordic Skiing:** Montana's Yellowstone Country is a Nordic utopia, with West Yellowstone's Rendezvous Ski Trails, Boundary Trail, and Riverside Ski Trail and Bozeman's Crosscut Ranch, Big Sky's Lone Mountain Ranch and Red Lodge Nordic Ski Center serving as Nordic skiing hubs. Additionally, the five Montana counties that make up Yellowstone Country are crisscrossed by thousands of kilometers of skiable terrain, much of it augmented with established Nordic trails. Over-the-snow tours and Nordic skiing in the world's first national park enable visits to areas otherwise inaccessible. And what's better than gliding across a super volcano?
- **Culture and History:** From American Indian heritage, dinosaurs to mining, ranching and mountaineering men, the region offers a unique blend of history and culture. The Lewis and Clark Trail and the Bozeman Trail covered areas of the region. Montana's Yellowstone Country is a partner in the statewide Montana Dinosaur Trail, with Bozeman's Museum of the Rockies as an anchor facility. Tippet Rise is a world-class sculpture and music venue. Native Americans have homeland ties to the area, with the original Crow Agency site, Madison Buffalo Jump and Headwaters of the Missouri all holding significant cultural and historical value for Indian Country.
- **Annual Signature Events:** Local festivals and events, farmers markets, fairs, community rodeos, Independence Day celebrations, winter carnivals and more, fill all seasons on the calendar.
- **Year-Round Outdoor Recreation:** The region abounds with year-round outdoor recreation opportunities—alpine and Nordic skiing, snowmobiling, wildlife watching, water recreation, ice climbing, hiking, snowshoeing, and soaking in one of the region's hot springs are just a sampling.
- **Destination Lodging and Meeting Facilities:** Several communities in the region have properties and facilities that can accommodate small to mid-size meetings and conventions. Bozeman and Big Sky also have full-service entities with the capacity to host larger groups.
- **Bozeman Yellowstone International Airport:** As the busiest airport in the state, BZN offers service from nine airlines to 25 destinations.
- **Ease of Access:** With Interstate 90 running through region and well-developed highways throughout, communities and attractions are easily accessible by vehicle year-round.
- **Open Lands:** Access to BLM lands, US Forest Service land, national and state parks, all just a short distance from any point in the region.
- **Four Montana State Parks:** Cooney Reservoir, Missouri River Headwaters Madison Buffalo Jump and Greycliff Prairie Dog Town
- **Regional Partnerships:** Montana's Yellowstone Country maintains close ties with both public and private sector partners throughout the region, which enables us to better promote an area or activity in area locales.
- **Statewide Partnerships:** Partnering with Destination MT, Montana Office of Tourism and the other Regions/CVBs for specific joint ventures has always been an integral part of YC's strategy. Additionally, partnering with state agencies and other entities remains a priority. We will continue to work with the Montana Film Office, Montana State Parks, etc. as opportunities present themselves.

- **Destination Lodging:** Accommodation options are diverse—from luxury guest ranches to campy motels to romantic B&Bs. Visitors can stay in a timbered lodge or even pitch a tent close to steaming geysers.
- **Vibrant communities and rural corridors:** The communities that make up the whole of Yellowstone all contribute to the heart of big sky country in their own authentic way.

### 1c. Opportunities: OPPORTUNITIES

- **Seasonality:** While this is also a challenge, seasonality presents an opportunity to develop and/or grow our tourism product in very distinct seasons. Winter in Montana’s Yellowstone Country continues to grow, and in places like Big Sky, it is the “premier” season; however, there is still ample room for growth in winter. There is also an opportunity to promote the spring and fall seasons to Montana residents, empty-nesters, and singles.
- **Opportunity to Entice a Younger Demographic:** There is an opportunity to promote the region to those seeking outdoor recreation and rich cultural experiences.
- **Increasing Air Service to New and Existing Markets:** BZN now has direct flights to metro areas such as Boston, Austin, Charlotte, and Nashville, which provide an opportunity to promote this region to travelers from those markets.
- **Outreach and Education for Both Residents and Nonresidents:** An opportunity exists to implement an ongoing outreach program for residents while implementing an awareness factor into the marketing mix for non-residents.
- **Rural Communities and Areas:** Even while being the smallest geographic region in the state, Montana’s Yellowstone Country is still largely rural, and the opportunity exists to move visitors from the heavily congested areas into the more rural outreaches by promoting day trips, scenic routes, and activities in these places.

### 1d. Potential Challenges: CHALLENGES

- **Inclement Weather Conditions/Natural Disasters:** Wildland fires, floods, lack of snow, etc.
- **Climate Change:** Affects recreation (such as fishing and skiing), the economy (tourism-related jobs) and our environment.
- **Transportation Issues:** Public transportation, seasonality of service, lack of electric car charger stations in rural areas.
- **Economic Climate:** Reduced promotion funding, recession, inflation, gas prices, etc.
- **Infrastructure:** As the number of visitors continues to increase, infrastructure issues are a concern.
- **Crowding/Overuse in YNP and Specific Areas of the Region:** Over-capacity issues.
- **Seasonality:** Weather, amenities/service availability and staffing all have an impact on the potential growth of shoulder seasons.
- **Diversity, Equity, and Inclusion:** We work diligently to maintain an inclusive and accessible destination where all are welcome.
- **Competition:** Travelers can choose any destination in the competitor set, so it is a challenge to make sure we give them the differentiation reasons to choose this destination.
- **Public Health Issues:** Including communicable viruses.
- **Workforce Issues:** Wages, housing, availability, etc. \_
- **Government Closures and Restrictions:** Federal & state government-mandated closures and restrictions
- **Resident Sentiment Towards Tourism:** According to ITRR’s Attitudes Towards Tourism 2022 report, overall residents agreed that the benefits of tourism outweigh the negative impacts. However, the percentage of respondents agreeing or strongly agreeing has decreased from 71% to 66% over the last two years.

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**2. Briefly describe how your destination aligns with the Montana brand or describe the Brand strategy for your DMO.:**

**MONTANA BRAND AFFILIATION**

Yellowstone Country aligns effortlessly with Montana's Brand. There is an abundance of spectacular, unspoiled nature, breathtaking experiences, renowned hospitality, and vibrant, unique, welcoming, and charming communities.

**Montana's Yellowstone Country completed a rebranding process in 2022. We developed our own brand pillars and value statements that will serve as the foundation for everything we undertake, and they align with Destination MT's campaigns and messaging.**

1. **NATURAL WONDERS + CAPTIVATING LANDSCAPES-** The landscape of Montana's Yellowstone Country can be hard to process at times. The land itself is teeming with natural wonders and the wildlife that roams freely can seem like a vision lost a long time ago. Quite frankly, there is nowhere else like it in the country.
2. **VIBRANT COMMUNITIES + WESTERN HOSPITALITY-** Sitting in such a spectacular setting, it's no wonder the communities of Yellowstone Country are special. As Montana's gateways to Yellowstone National Park, they not only offer comfort and respite for the traveler but are destinations unto themselves.
3. **YEAR-ROUND EXPLORATION + PREMIER OUTDOOR ADVENTURES-** Yellowstone Country has no off-season. From the quiet springs to the golden autumns, the quintessential summer adventures to the world-class winter recreation that comes from being home to three of Montana's biggest ski areas, there is always something to do in this part of Montana.
4. **RESPONSIBLE RECREATION + ESSENTIAL PRESERVATION-** Although they are landscapes of incredible ruggedness, our outdoor spaces are also incredibly fragile. Promoting responsible recreation is paramount to preserving both our natural assets as well as our cherished communities. Our commitment to promoting travel and tourism while considering the potential impact, is in Montana's best long-term interest.

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**Destination Marketing:**

**Destination Management:**

**Destination Stewardship:**

**Destination Development:**

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**3a. Define your audience(s) (demographic, geographic and psycho-graphic):**

**Destination Marketing Target Audience**

**CONSUMER**

Montana's Yellowstone Country annually assesses current target markets to measure their effectiveness while also adding in new markets identified through evaluation of research data, campaign tracking, social media analysis, locations where there's new/increased air service to Montana and media outreach. By regularly

evaluating existing target markets and adding new ones, Montana's Yellowstone Country can stay ahead of emerging trends and adapt to changing consumer preferences, ultimately maximizing our ROI.

### **Direct Flight Geographic Markets**

California (Los Angeles, San Diego, San Francisco, Orange County)

Illinois (Chicago)

Oregon (Portland)

Colorado (Denver)

Texas (Austin, Dallas/Fort Worth, Houston)

Georgia (Atlanta)

Minnesota (Minneapolis/St. Paul)

Washington (Seattle)

Pennsylvania (Philadelphia)

Utah (Salt Lake City)

Massachusetts (Boston)

New York (New York)

Tennessee (Nashville)

North Carolina (Charlotte)

### **Drive Markets and Secondary Geographic Markets**

Montana (out of region), Spokane/CDA DMA, Idaho, Wyoming, North Dakota, South Dakota, Saskatchewan, Alberta, British Columbia,

\*These markets are identified using direct inquiries (including website inquiries, live chats, and incoming calls), available research data, Visitor Information Centers visitor data, and direct flight metro areas.

### **Key Demographic Markets**

City dwellers (i.e., not rural, not suburban)

Affluent with a household income over \$80k

Well-educated

Married with children

### **Key Psychographic Markets**

Social Class: middle to upper class (in terms of disposable income)

Lifestyle: active, outdoor-recreation oriented, frequent travelers

Opinions: interested, but primarily influenced by the desire to experience things for themselves

Activities and Interests: outdoor activities, history and culture, foodies

Attitudes and Beliefs: environmentally conscious, adventurous spirits, like nature

Technology-savvy: using mobile devices in all stages of planning and travel

Families: Family travel

**Destination Management Target Audience:** residents, non-resident travelers, regional destination managers, industry partners

**Destination Development Target Audience:** residents, non-resident travelers, regional destination stakeholders, statewide DMO partners

**Destination Stewardship Target Audience:** residents, non-resident travelers, regional destination stakeholders

### **3b. What research supports your DMO strategy? :**

Montana's Yellowstone Country receives and analyzes data from the following resources:

- Destination Analysts
- nSight
- VisaVue
- Zardico (shared by partners)
- AirDNA
- Cision
- Skift
- RMI
- USTA
- US Bureau of Economic Analysis
- MLHA/STR
- Crowdriff
- Nativo
- Epsilon
- VICs
- Internal Campaign Analysis
- Research/Surveys
- State/Regions/CVBs/Local Chamber Data
- Bozeman Yellowstone International Airport
- Montana Tourism Data-Card Spend Report (on brandmt.com)
  
- Bozeman Resident Sentiment Study (Destination Analysts & Prime Media)

### **Key ITRR 2023 data**

- Average # of nights spent in YC region—6.6
- 38% of nights spent in the state were spend in YC
- 52% of visitors to the region came for vacation/leisure, 14% to visit family/friends, 18% just passing through and 7% for business/conventions/meetings
- 66% of visitors were repeat visitors and 22% were first time visitors
- 79% of visitors to the region are traveling in group sizes of 2 or more
- 61% of travelers to the region have an annual income greater than \$75,000.00
- Top 10 activities visitors to the region participated in:
  1. Scenic driving (48%)
  2. Day hiking (40%)
  3. Wildlife watching (35%)
  4. Nature photography (31%)
  5. Recreational shopping (24%)
  6. Car/RV camping (24%)
  7. Visit local breweries (19%)

8. Visit other historical sites (18%)
9. Visit Lewis & Clark sites (12%)
10. Attend other event (11%)

**Key Bozeman Yellowstone International 2023 data** (provided by BZN)

- Bozeman Yellowstone International Airport Shatters All-Time Passenger Record in 2022 with 2.26 Million Passengers Traveling Through Montana’s Busiest Airport
- Bozeman Yellowstone International Airport (BZN) experienced another year of record-breaking passenger growth and infrastructure development.
- BZN handled an all-time record 2,264,424 passengers during 2022. This is a passenger increase of 16.7% over the previous record of 1,940,191 set in 2021. Over 40% of passengers traveling by air to or from Montana traveled through BZN in 2022.
- BZN is the seventh busiest airport in the seven-state Northwest Region of the country (region including Colorado, Utah, Wyoming, Idaho, Montana, Oregon, and Washington) and the 92nd busiest airport in the nation in terms of passengers.

Passenger totals in and out by airline brand in 2022 were:

Delta Air Lines – 622,232	United Airlines – 588,474
Southwest Airlines – 446,867	Alaska Airlines – 227,304
American Airlines – 220,087	Allegiant Air – 102,203
JetBlue – 36,925	Sun Country – 14,675
Chartered Airline Flights – 5,657	

**3c. What are your emerging markets?:**

**EMERGING MARKETS**

**Entertainment Seekers**

Visitors who come to Montana continue to seek live entertainment (i.e., concerts, festivals, rodeos, etc.), which provides us with the opportunity to encourage them to stay longer and do more while in the area. Venues, such as Bozeman’s *The Elm*, Paradise Valley’s *Pine Creek Lodge*, *Music Ranch Montana*, and *Emigrant Saloon* continue to grow their product, which will help increase awareness of Yellowstone Country as a live music destination.

**Western Culture Seekers/ Outfitting & Guiding**

Research shows there’s a growing number of visitors attracted to an authentic Montana experience. With a wide variety of ranch-style accommodations spanning working ranches, guest ranches and five-star venues, there are places to suit every visitor’s idea of the perfect western vacation. Similarly, outfitters provide firsthand, genuine experiences in Yellowstone Country. Interest in guided excursions and activities continues to increase in the Yellowstone Country region.

**International Visitors**

With international travel returning post-COVID, there is increased interest in this region and Yellowstone National Park. While International Visitors have not been a primary focus of Montana’s Yellowstone Country for the last several years, we will continue to assess this as an emerging market and are prepared to implement a marketing strategy and campaign focused on this audience.

**Urban Areas**

We will continue selecting urban areas of focus in relation to our identified key geographic target markets. We

anticipate doing media outreach trips to additional urban areas in California and Texas, in addition to new markets in New York, Pennsylvania and Minnesota.

**Group Travel:** As our lodging property capacity continues to expand, there's an opportunity to market to group travel including meetings, conventions, weddings, and reunions. The region assisted two regional DMOs to attend travel & trade shows in FY 24, and we anticipate expanding these partnerships in FY 25.

**Tour Groups/Tour Operators:** Historically, domestic and international tours groups have been limited to the gateway communities in the region (primarily West Yellowstone); however, there is interest from regional DMO partners in marketing other communities to these groups as well, so Yellowstone Country will vet opportunities to participate in marketing to this target audience in FY 25.

### **OTHER TARGET MARKETS (may fit under one/more of marketing, management, development, or stewardship endeavors)**

#### **Earned Media/Publicity**

Yellowstone Country has focused and will continue to focus on family-travel journalists and influencers, as well as those who specialize in outdoor recreation. We are starting to see a demand for more traditional travel journalism, so our strategy is to host a mix of journalists and influencers whose readers & followers match well with our target audience.

#### **Events**

Yellowstone Country will continue to place an emphasis on its events through the promotion of its events calendar and blogs via the website, email marketing and social media. Additionally, our events grant program provides funding to help eligible events advertise & promote.

#### **Film**

Yellowstone Country will continue supporting our private sector, regional DMO's and the Montana Film Office on film projects as requested.

### **NICHE MARKETS**

#### **In-State Residents**

We will continue our in-state 'staycation' campaigns for Montanans, promoting the spring and fall shoulder seasons, and focusing on the more rural areas of the region. Messaging will encourage locals to take advantage of Montana's beauty and adventure, all while escaping the crowds of peak seasons.

Our strategy aims to promote and distribute visitor traffic from popular areas like Yellowstone National Park and Gallatin Gateway to lesser-known rural communities in Montana's Yellowstone Country during off-peak seasons such as shoulder and winter, in order to support local businesses and attractions and reduce overcrowding in the main tourist hubs.

The focus of our marketing efforts to both in-state and regional drive markets (WY, the Dakotas, UT, ID, WA, etc.) will be to promote our more rural areas and under-served communities to help spread visitation across the entire region. ITRR 2023 data shows regional drive markets of ID, WA, MN, CO, and UT are where the largest # of travel groups to Montana's Yellowstone Country originate from; we believe this is a good target audience for rural area promotion.

#### **Family Travelers**

Family travel continues to be a growing market for all of Montana, and Yellowstone Country is no exception. Yellowstone Country's natural attractions and proximity to Yellowstone National Park make it a fit for family vacationers. ITRR data: 20% of visitors to the Yellowstone Country region are family travel, with 51% of those being couples.

#### **Western Ski Audiences**



Direct marketing to skiers who frequent western ski resorts (i.e., Colorado, Wyoming, and Utah), in addition to a continued presence in select flight and drive markets, promoting Yellowstone Country's accessibility and adventure.

### **History Audiences**

Travelers are often natural history lovers, with a yearning to learn about the world, its people, places, and cultures; this is an emerging and/or growing market, so in FY24 we have continued promotion to this audience, and in FY 25, we will seek statewide partnerships to help highlight these assets. ITRR 2023 data: 18% of visitors are visiting historical sites, 11% are visiting museums and 12% are visiting Lewis & Clark sites.

### **Motorcyclists**

Motorcycle travel continues to be a growing niche market that provides opportunities for targeted messaging within the region, and potentially in partnerships with neighboring regions. Opportunities include itineraries and maps featuring unique and appealing roadways, targeted media buys and a combination of in-state (drive) and out-of-state (fly-ride) messages. We will continue our motorcycle-specific targeting with our Glaciers to Geysers joint venture with Western Montana's Glacier Country and Southwest Montana.

### **Snowmobilers**

Snowmobiling continues to be a strong segment for Montana's Yellowstone Country region. Between guided trips and the option to go sledding on your own, there is something for everyone. Snowmobiling campaigns focused both within the region, and/or in partnership with other regions. Like the motorcycle audience, snowmobile campaigns will include itineraries, maps, targeted media buys and a combination of in-state (drive) and out-of-state (fly-ride) messages. We will also continue using snowmobile-specific targeting with the Glaciers to Geysers joint venture with Western Montana's Glacier Country.

### **Birding Enthusiasts**

Birding has become a valuable niche activity, and there are multiple locations within the region, and in neighboring regions, which continue to draw this group. Yellowstone Country created our own birding guide, and regional VIC managers report it is one of their most in-demand publications. We will seek opportunities to expand our promotional efforts to this high-value, low-impact audience.

### **Craft Beverage + Food Enthusiasts**

Craft beverage venues (breweries, distilleries, wineries, cideries) have a growing following throughout Montana. We see an opportunity to connect with statewide partners to promote this segment and raise awareness of Montana as a destination for our craft beverage consumers. 2023 ITRR data: 19% of visitors to the YC region are visiting local breweries. Fine dining is also on the rise within the region with James Beard recognized restaurants including *Campione* in Livingston, *Little Star Diner* in Bozeman and *MontAsia* in Fishtail.

### **Wellness Travel**

Montana's Yellowstone Country region offers a wide array of wellness focused attractions and activities including spas, retreats, and hot springs. We have splendid video content to help promote wellness travel in the region and plan to expand current website content to further promote these offerings.

### **Direct Flight Markets**

Bozeman Yellowstone International Airport now has 25 non-stop flights to 23 destinations across the country. The addition of Southwest Airlines in 2021 has made Bozeman a "hub" for people from neighboring cities and states to fly out of Bozeman. Our strategy will be to create awareness around direct flights and entice travelers to consider Yellowstone Country as their next destination.

Current Direct Market Flights include:

Atlanta	Austin
Boston	Burbank
Charlotte	
Chicago (MDW and ORD)	Dallas (DAL and DFW)
Denver	
Houston	Las Vegas
Los Angeles	Minneapolis/St. Paul
Nashville	New York
Newark	Orange County
Phoenix	Portland
Salt Lake City	San Francisco
Seattle/Tacoma	San Diego
Washington, D.C.	

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

**Goal 1: Continue to increase Yellowstone Country Brand Recognition: Promote Montana’s Yellowstone Country as a premier year-round leisure destination, using the “Unofficial Ranger” assets & messaging, and taglines such as “Yellowstone is more than a park. In Montana, it’s an entire country!” to inspire visitation by residents and non-residents. (Destination Marketing)**

**Goal 2: Work to increase tourism product offerings across the region. (Destination Marketing, Destination Management, Destination Development)**

**Goal 3: Continue increasing Montana’s Yellowstone Country’s role in efforts to build resiliency across the region. (Destination Management, Destination Stewardship)**

**Destination Marketing PROJECTS & TACTICS**

**Tactics:**

Marketing campaign messaging and imagery are specifically designed to address the Inspiration phase to targeted audience segments. This messaging inspires visitors and potential visitors to view themselves, and their destination, through the lens of Montana’s Yellowstone Country brand...free-spirited, adventurous, genuine, and captivating.

**CONSUMER ADVERTISING:**

- o Online/Digital
- o Print
- o Video/Photography
- o Website/Electronic
- o Webpage Marketing/SEO/SEM
- o Out-of-Home

- o Social media (organic and paid)
- o Joint Ventures
- o Printed Materials /Travel Guides
- o G2G Content

#### PUBLICITY:

- o Media Outreach (in target urban markets)
- o Press/Influencer FAM Trips
- o Email Marketing
- o Blogging
- o Travel/tradeshows (planning to collaborate with the state & DMOs both in the region & across the state)

#### ORIENTATION AND FACILITATION/SUPPORT:

The Yellowstone Country website, call center, travel guide and scenic road map are the primary resources for helping travelers with the orientation and facilitation phases, although all have functions during the inspiration phase as well. These innovative resources make the travel planning process as easy and efficient as possible.

- Website
- Travel Guide
- Scenic Road Map
- Call Center & Fulfillment
- Visitor Information Centers Support
- DMO Training/Support
- Community Outreach
- Cultural Tourism grant program
- Family Adventure Guide
- Birding Guide

**Tourism Industry Partners**—Montana’s Yellowstone Country will continue collaboration with tourism industry partners. Current, and still developing, partnerships include:

- **Destination MT Joint Ventures:** (Sojern, Teads, Jun Group)
- **Montana State Parks Collaborative Projects**
- **DMO Collaboration:** Glaciers to Geysers (GC), Montana Dinosaur Trail (SEMT, MRC, YC, CM), **Travel Guide/Website Promotions** (GC, SEMT, Red Lodge, Big Sky, West Yellowstone), **Montana’s Great Wide Open: Breaks to Badlands to Beartooth’s (BBB)**

The ongoing statewide cooperative partnerships we participate in have been remarkably successful for Yellowstone Country to-date; we will continue our participation in Glaciers to Geysers, Montana’s Great Wide Open and the Montana Dinosaur Trail in FY 25. **Potential new Product Development partnerships for FY 25:** Participating in The Montana Bookstore Trail and Eastern MT’s Trail to the Stars (if allowed).

Additionally, Yellowstone Country offers co-op advertising campaign options for non-CVB regional partners. These are winter-specific, and warm-season specific co-ops, which have had excellent participation from private sector businesses such as **Red Lodge Mountain, Bridger Bowl, Museum of the Rockies, and Yellowstone Hot Springs.**

Yellowstone Country will continue our partnerships with regional CVBs and businesses to host press/influencer trips and video shoots throughout the region each year. These are successful because they not only raise awareness of the region, but we gain content and assets to use for all promotional efforts.

- Sojern banner and video, in-state digital and national print cooperatives have given the entire region a presence, with the intention of continued growth and development of future options. Using this model, Yellowstone Country has been able to offer digital and print packages to in-region partners at a fraction of the cost of the overall placements.

The ongoing statewide cooperative partnerships we participate in have been successful for Yellowstone Country; we will continue our participation in Glaciers to Geysers, the Great Wide Open and the Montana Dinosaur Trail.

- Research: Yellowstone Country participates in the FY 24 BrandMT Research Joint Ventures (Zartico, credit card spend data), and will look at offerings for FY 25 as offered by the state's new research agency. Additionally, we will invest in a vetted research resource that can help us to best identify our visitor profiles, such as Destination Analyst, Datafy, Zartico, etc. This will either be an independent buy for YC, or we will do so in collaboration with other DMOs.

## **Destination Management PROJECTS & TACTICS**

### **Tactics:**

Yellowstone Country has administered a VIC Staffing grant program for 25+ years. There continues to be substantial use of VIC services by travelers. VICs managed by chambers and other non-profit organizations have limited funding for staffing requirements. This grant program provides much-needed assistance for VICs to hire and train staff to assist visitors to the region. Yellowstone Country has identified this program as being a crucial part of visitor services. Due to requests from VIC managers, the YC Board of Directors increased our planned FY 24 program budget from \$120,000.00 to \$210,000.00. This increase will allow participating VICs to be open more hours during the warm season, and to stay open longer into the season (through October 31<sup>st</sup>).

The call center will help supplement destination management efforts by helping orientate and facilitate visitors to avoid crowded areas in a similar fashion as a VIC. The continued increase in visitation necessitates the use of the call center to help visitors navigate the Yellowstone Country region. In 2023, additional call center services were added, with the objective of helping support the greater demand from visitors who seek to include both Glacier and Yellowstone National Parks in their travel itineraries. The call center manager has indicated an increase in inquiries from interested two-park visitors who are considering flying into Bozeman, Kalispell, or Missoula, and heading to both parks on their trip plans. In FY 25, we will continue to support the Glacier National Park vehicle hotline as a source for leads to direct travelers to our regions and smaller communities.

The call center also provides the distribution & fulfillment function for our campaigns' call to action to order printed materials.

## **Destination Development PROJECTS & TACTICS**

### **Tactics:**

In FY 23, Yellowstone Country offered a VIC Enhancement Project grant program to provide VICs with funding for small improvement project(s) to the facility itself and/or its outdoor areas. The goal for this program was to enhance the visitor experience. Six eligible VICs participated, with projects such as interior/exterior painting, bathroom fixtures replacements, replacing countertops at the visitor counter, purchasing brochure racks, bookshelves, and computer equipment, doing exterior landscaping projects, and purchasing flower planters/boxes. This grant program was not offered in FY 24, but due to popular demand, it is returning in FY 25.

Yellowstone Country has had a Cultural Tourism grant program since 2015. This successful program is focused on supporting new events and attractions and/or helping already established ones to grow and enhance their product. Seven regional events received grant funds in FY 23, and in FY 24 to-date, there have been 6 grants awarded, with 3 applications pending at the time this DMO plan was submitted.

The collaborative project between four of the regions (Yellowstone Country, Southeast MT, Central MT, and Missouri River Country) was developed to establish a travel connection between the Badlands-Breaks-

Beartooths, with the objective of promoting the more rural areas of each of the four regions. The project is called *Montana's Great Wide Open*. This collaboration received a Destination MT match grant in FY 23, which the regions have used to develop the project over 2023/2024. Promotion assets include a website that highlights itineraries and routes through, and connecting to, each of the regions. In FY 25 Yellowstone Country will begin incorporating this content for our own regional promotion efforts, as well as participating in collaborative marketing with our partners.

## **Destination Stewardship PROJECTS & TACTICS**

### **Tactics:**

Yellowstone Country will begin working on the initiatives and projects identified in the regional Resiliency Strategic Plan to address the ongoing challenges of constructively managing assets in conjunction with marketing the assets to visitors. A regional, volunteer steering committee will advise & assist YCMI with developing & implementing specific projects. Possible Tactics:

- Host community listening sessions with Sebanye Stillwater and Northwestern Energy to inform local areas about the transformation to green energy currently taking place.
- Send a monthly newsletter to tourism stakeholders around the state and region to keep them abreast of Yellowstone Country resilience strategies, marketing plans, and cooperative opportunities.
- Create a Yellowstone Country Neighbors Guide for new homeowners.
- Explore a possible grant program to assist local communities or organizations in their sustainability efforts.
- Create a workforce development program, or potential scholarship in conjunction with Montana State University and private industry to encourage Montana residents to pursue careers in hospitality.

YCMI supports the Big Sky Passenger Rail Authority's efforts to return rail passenger service to southern Montana; the former North Coast Hiawatha (NCH) route is now a preferred route in the Federal Railroad Administration's (FRA's) long-distance study. Yellowstone Country believes this effort supports tourism development, aids in providing quality of life for residents as a means of travel to/from smaller, rural communities, addresses clean energy (using hydrogen-powered trains). In the current research and planning phases of this ongoing effort, there is an opportunity for Yellowstone Country to fulfil our Destination Management and Destination Stewardship role by bringing stakeholders and interested parties together.

Potential projects/tactics Yellowstone Country will assist with in FY 25:

- helping convene & host groups working on a service development plan, which seeks to address connectivity challenges of getting travelers to/from communities that are not on the direct route—mass transportation options
- helping to disseminate information focused on stakeholder engagement

Additionally, Yellowstone Country will continue collaborative partnerships such as the following:

- Leave No Trace/Recreate Responsibly- create content and awareness campaigns; include this messaging in all promotion efforts.
- Collaborating with regional partners on community outreach efforts focused on informing residents about the value of tourism in their communities.

Yellowstone Country will collaborate with Montana State Parks to develop social media content & messaging around these topics:

- FAQ of Park Ranger (Loop in NPS)
- Trail Maintenance, Conservation Corp, GVLTT
- 85th anniversary of FWP, how they started, what they do
- Changes in camping, camping etiquette (talking points from communications dept)
- Dogs
- Conservation licenses

- River recreation safety
- Fire safety, designated burns, DNRC, USFS

**5. Define and describe your overall objectives. Objectives are formed from your goals. They are logical, attainable steps to achieve the goals and are able to be measured.:**

**Objectives/Metrics/Evaluation:**

OBJECTIVES	MEASURABLE METRICS FOR SUCCESS	REPORT THE METRIC ACHIEVED	EVALUATION OF SUCCESSFUL METRICS
<p><b>Objective:</b> Implement multi-layered warm, shoulder and winter campaigns that target a specific segment of our overall audience: geographic, demographic, psychographic, niche, and emerging markets. These campaigns would highlight the multitude of experiences and outdoor recreational activities available in the region.</p>	<ol style="list-style-type: none"> <li>1. Increase unique website visitors by 5% annually.</li> <li>2. Increase consumer database (leads and inquiries) by 3% annually.</li> <li>3. Paid Media Benchmarks               <ol style="list-style-type: none"> <li>a. Average CTR above .10% (industry benchmark .06%)</li> <li>b. Average CPC under \$3.50</li> </ol> </li> <li>4. Increase lodging tax revenue for the region; target 2% year-over-year increase.</li> </ol>		
<p><b>Objective:</b> Participate in a minimum of 3 Joint Venture advertising campaigns/projects with Destination MT, 3 with DMOs outside the Yellowstone Country region, and 3 within the region.</p>	<ol style="list-style-type: none"> <li>1. # of joint ventures we participated in</li> <li>2. Track the analytics of each campaign/project</li> </ol>		
<p><b>Objective:</b> Develop cooperative advertising campaign options in which public/private</p>	<ol style="list-style-type: none"> <li>1. Develop a minimum of 2 cooperative marketing campaigns focused on a specific market segment, i.e., skiers, baby boomers, RVers; track the</li> </ol>		

<p>partners have an opportunity to collaborate with Yellowstone Country.</p>	<p>campaign analytics 2. # of cooperative partners</p>		
<p><b>Objective:</b> Attend consumer/trade show or tourism conference and assist DMO regional partners to attend shows which meet our overall goals and target audiences.</p>	<p>1. # of consumer/tradeshows attended by YC staff/representatives 2. # of partners that participate 3. # of leads</p>		
<p><b>Objective:</b> Continue developing Montana’s Great Wide Open promotional assets: Badlands to Breaks to Beartooths scenic route project with Southeast Montana, Central Montana, and Missouri River Country.</p>	<p>1. Host a minimum of 2 influencer or press trips to highlight the YC portion of the Great Wide Open routes within the region. 2. Do 1 video shoot that captures video/photography for specific communities and/or attractions along the Yellowstone Country routes. These assets will be used for website content and promotion/advertising campaigns.</p>		
<p><b>Objective:</b> Collaborate with Western Montana’s Glacier Country and Visit Southwest Montana to jointly fund call center activities to help capture data from visitors to both national parks and the corridor in between.</p>	<p>1. Generate data reports that can be used for strategic planning pertaining to Yellowstone and Glacier National Parks, and the areas of the three regions between them; use the data to guide strategic partnerships and campaigns.</p>		
<p><b>Objective:</b> Use the photos/video assets and</p>	<p>1. Develop a multi-media mix campaign focused on promoting the more rural areas</p>		

<p>customized itineraries developed in FY 24 to promote the under-served and more rural areas of the region in FY 25.</p>	<p>of the region.</p> <ol style="list-style-type: none"> <li>2. Increase web traffic to rural corridor pages, itineraries, and rural community pages by 25% annually.</li> <li>3. Paid Media Benchmarks <ol style="list-style-type: none"> <li>a. Average CTR above .10% (industry benchmark .06%)</li> <li>b. Average CPC under \$3.50</li> </ol> </li> <li>4. Host a minimum of one influencer or press trip to specifically promote an under-served or rural area of the region.</li> </ol>		
<p><b>Objective:</b> Research/vet the feasibility of a regional collaborative ‘trail,’ ‘route’ and/or content collection that directs visitors to an interaction with the multitude of artists and writers who live &amp; work in Montana’s Yellowstone Country region.</p>	<ol style="list-style-type: none"> <li>1. In FY 25, conduct outreach with potential participants, and/or funding partners to determine feasibility. If development of a new “attraction” is feasible, then in FY 26, the objective would be to develop the scope of the project and its timeline.</li> </ol>		
<p><b>Objective:</b> Elevate awareness of our agritourism products through website content, itineraries, social media, and other outreach opportunities as they occur.</p>	<ol style="list-style-type: none"> <li>1. Add agritourism content to the website; develop a specific landing page and/or add the content to the community pages.</li> <li>2. Verify all the agritourism entities in the region have a listing in our database.</li> </ol>		



	<ol style="list-style-type: none"> <li>3. Collaborate with our partners to host a minimum of 1 influencer/press trip to promote agritourism experiences found in the region.</li> </ol>		
<p><b>Objective:</b> Collaborate with Montana’s Yellowstone Country regional DMOs to host a minimum of one community outreach event focused on sustainability topics.</p>	<ol style="list-style-type: none"> <li>1. Hold a minimum of 1 education/outreach regional community event to share the Yellowstone Country Resiliency Plan with stakeholders.</li> </ol>		
<p><b>Objective:</b> Conduct a research project, with the goal of soliciting feedback from visitors pertaining to their experiences in the region. This data would be used to help develop strategy and specific projects that are paramount to address. This survey would be sent to our social media audience, our website users, and our direct email database.</p>	<ol style="list-style-type: none"> <li>1. Completion of the research project.</li> <li>2. Analyze research data received to help determine management &amp; stewardship projects for Yellowstone Country to undertake.</li> </ol>		
<p><b>Objective:</b> Continue to participate in stewardship programs such as Leave No Trace and Recreate Responsibly, implementing the appropriate messaging and</p>	<ol style="list-style-type: none"> <li>1. Participate in a minimum of one cooperative information campaign (social media, broadcast, print) with partners such as Destination MT, Montana State Parks, DMOs focused on Recreate Responsibly, Leave</li> </ol>		

tactics into our campaigns and programs.	No Trace, Be Bear Aware, etc., or other stewardship initiatives.		

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**Budget Form:** FY 25 YC DMO Budget 3-24.xlsx

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**DMO Budget:**

**YELLOWSTONE COUNTRY MT**

Allowable Method	Amount Budgeted	% Budgeted	Amend +/-	Updated Budget	% Budgeted
Administration	\$400,000.00	10.00%	\$0.00	\$400,000.00	10.00%
Agency Services	\$835,000.00	20.88%	\$0.00	\$835,000.00	20.88%
Cooperative Marketing	\$50,000.00	1.25%	\$0.00	\$50,000.00	1.25%
Earned Media/Tourism Sales	\$125,000.00	3.13%	\$0.00	\$125,000.00	3.13%
Education/Outreach	\$75,000.00	1.88%	\$0.00	\$75,000.00	1.88%
Joint Ventures	\$500,000.00	12.50%	\$0.00	\$500,000.00	12.50%
Marketing Resources	\$75,000.00	1.88%	\$0.00	\$75,000.00	1.88%
Opportunity Marketing	\$25,000.00	0.63%	\$0.00	\$25,000.00	0.63%
Paid Media	\$990,000.00	24.75%	\$0.00	\$990,000.00	24.75%
Product Development	\$100,000.00	2.50%	\$0.00	\$100,000.00	2.50%
Research	\$25,000.00	0.63%	\$0.00	\$25,000.00	0.63%
Travel/Trade Shows	\$50,000.00	1.25%	\$0.00	\$50,000.00	1.25%
Visitor Services	\$700,000.00	17.50%	\$0.00	\$700,000.00	17.50%
Website Development (Online, Website, Mobile)	\$50,000.00	1.25%	\$0.00	\$50,000.00	1.25%
	\$0.00	0.00%	\$0.00	\$0.00	0.00%
<b>TOTAL BUDGET</b>	<b>\$4,000,000.00</b>	100.00%	<b>\$0.00</b>	<b>\$4,000,000.00</b>	<b>100.00%</b>

Revenue Projection	\$4,000,000.00
Funds not spent during previous fiscal year	\$0.00
Rollover Funds at Commerce	\$0.00
Allocated Following Audit	\$0.00
<b>Budget increase total</b>	<b>\$4,000,000.00</b>

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**Narrative Evaluation:**