BILLINGS DESTINATION STRATEGIC PLAN





INTRODUCTION

The Visit Billings brand helps to drive a \$621 million tourism industry, supports the livelihood of 50,000 Montanans, and contributes more than \$11 million in tax revenue annually. More than 2.6 million people visit Billings each year. Visit Billings is committed to establishing Billings as a premier destination for residents and visitors, and ensuring tourism continues to be a major economic driver in the area.

The Vision 2026 Destination Strategic Plan is designed to be an ongoing reevaluation of Visit Billings' goals, initiatives and outcomes that will further our success as advocates of Billings and the visitor experiences. By examining our potential opportunities, the growth of the destination and our collective stakeholder perspectives, we will ensure that Visit Billings remains a model Destination Leadership Organization (DLO) that leads the way in our changing industry.

Competition for leisure visitors, meetings, conventions, group tour (domestic and international travel) and sporting events is fierce. To be a leader within the tourism industry, destination marketing and management requires a strategic approach to build resilience in a competitive landscape. The recommendations within are a result of extensive research, to ensure the approach is based on a blend of information, collaboration and vision.

It is important to note and acknowledge that Visit Billings and other key city organizations - including Downtown Billings Alliance, Big Sky Economic Development, Billings Chamber of Commerce, Billings Parks & Recreation, Billings TrailNet and Billings City Council, among many others - already have made tremendous strides in the advancement, growth and evolution of Billings as a visitor destination, a preferred place to live, and a strong city to build and grow business. This Strategic Plan and its recommendations are meant to further that growth and leverage the research and infrastructure already developed over the last decade.

Today, Billings is the region's cultural and economic center, offering residents and visitors a unique blend of history, culture, and natural beauty. The city's economy is driven by the healthcare industry, along with agriculture, energy, and of course tourism. Given that the city is surrounded by the Rimrocks and situated on the waters of the Yellowstone River, Billings is a choice destination for outdoor enthusiasts. These assets, and many others, shape the perception and identity of Billings in the minds of people as they consider and evaluate where to visit, live, and invest.

What attracts people to live in Billings are the very same factors that inspire travelers to visit. Among them: the vast and awe-inspiring landscapes, the natural environment and open spaces; the diversity and friendliness of the people; the emerging culinary scene; and the quality of arts and culture. The city has evolved tremendously since its founding when it was named after Frederick Billings, the president of the Northern Pacific Railroad.

As we look ahead to the future, it is always important to remember our heritage. The city's rich history began with the Crow Nation, who have lived on these lands for centuries. Today, the Crow Indian Reservation, headquartered in Crow Agency, is the largest reservation in Montana encompassing approximately 2.2 million acres. From 1806, when the Lewis and Clark Expedition passed through this region to the 1880s when the Northern Pacific Railroad arrived in Billings and the city quickly became a major transportation hub, Billings has continued to grow and thrive.

As the City of Billings looks to its future, it is the responsibility of its community, businesses and political leaders to be purposeful in shaping the city's evolution. Recognizing this, throughout the strategic planning process, Visit Billings purposefully collaborated with stakeholders to consider how the destination should develop and evolve. Visit Billings and its consultants engaged with community leaders and stakeholders to understand the key competitive advantages and weaknesses of the visitor economy, and how it can improve the quality of life for local residents. This strategic plan outlines how the DLO and its stakeholders can work together to advance common economic, social, environmental and cultural goals.

As Visit Billings moves forward, the organization is focused on developing an authentic and memorable Montana travel experience with a resident-first mindset to differentiate our community from its competitive set in the leisure, meetings, conventions, group tours and sports markets. In this way, the Billings tourism industry will be well-positioned to help balance the economic development and quality of life issues facing our city and the region.

The result of that engagement is this Vision 2026 Destination Strategic Plan, intended to guide the planning, product development, programming, and promotion of Billings as a destination to visit, play, live, and work.





WHO WE ARE

Visit Billings is a leading tourism brand in Montana comprised of the Billings Tourism Business Improvement District and the Billings Convention and Visitors Bureau, and is managed by the Billings Chamber of Commerce.

Together with the Billings Chamber of Commerce/Convention and Visitors Bureau (BCC/CVB) and Billings Tourism Business Improvement District (BTBID) Boards, the Visit Billings team is committed to growing visitation to Montana's Trailhead. The staff is an extension of its stakeholders (local lodging, food and beverage, attraction and travel industry partners) working to provide sales, services and marketing support for the region to benefit Billings' hospitality and tourism industries.

BILLINGS TOURISM BUSINESS IMPROVEMENT DISTRICT BOARD OF DIRECTORS

GEORGE MARAGOS - Northern Hotel

JEFF SCHOENHARD - Kelly Inn Hotels

JOE STUDINER - Erck Hotels

SHELLI MANN - Boothill Inn & Suites

JORDAN CLAYTON - Home2 Suites By Hilton

STEVE WAHRLICH - Best Western Plus

Clocktower Inn & Suites

RON SPENCE - Billings Hotel And Convention Center

TOBY O'ROURKE - Kampgrounds Of America -

Ex-Officio

BILLINGS CHAMBER/CVB EXECUTIVE COMMITTEE FOR 2023/2024:

JEREMY VANNATTA - Chair - PayneWest Insurance

DEBBIE POTTER - Vice Chair - Eide Bailly

JESS PETERSON - Treasurer - Western Skies Strategies

JULIE SEEDHOUSE - Past Chair - Century 21 Hometown Brokers

TOBY O'ROURKE - KOA, Inc.

BRYCE TERPSTRA - Jones Construction, Inc.

CARMELITA DOMINGUEZ - Montana Allergy & Asthma Specialists

THE VISIT BILLINGS TEAM

JOHN BREWER, CAE, CATP

President & CEO
Billings Chamber of Commerce

ALEX TYSON, IOM, CATP

Executive Director Visit Billings (Billings TBID & Billings CVB)

ALY EGGART, MSPR, CATP

Leisure Marketing Director Visit Billings LUKE ASHMORE, PDM, CATP

Special Programs and Projects Manager Visit Billings

EVAN DECKER, PDM, CATP

Sports Tourism Manager Visit Billings

MEGAN STEVENSON

Finance Director
Billings Chamber/Visit Billings/
Visit Southeast Montana





OUR VISION

Billings will be recognized as a pure, authentic Montana experience, renowned for its genuine people who stay true to their roots. Visit Billings will be respected for its strategic approach to growth, and its commitment to sustainability, the environment and the Billings community.

OUR MISSION

Build a vital and sustainable tourism economy that benefits the quality of life for Billings residents, by promoting the region as a preferred travel destination and generating room nights for lodging facilities in the city through effective destination leadership and marketing management.

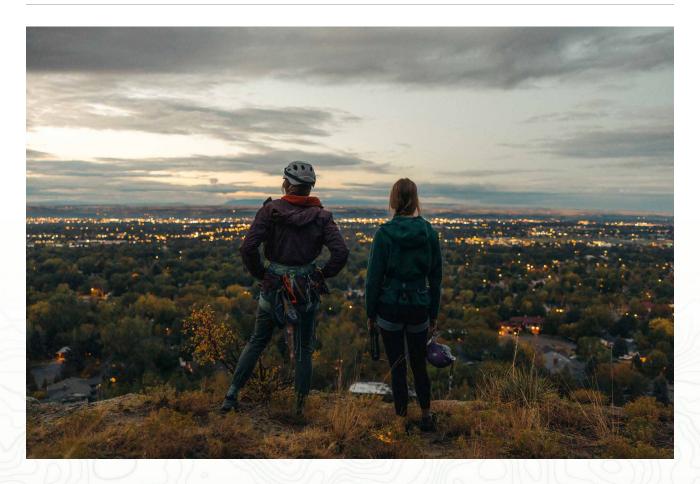
WHAT WE DO

Visit Billings promotes the city and the region through sales and marketing to meeting and sporting event planners, tour operators, travel industry professionals, journalists and leisure visitors. To do this, Visit Billings builds exceptional relationships with each of these audiences as well as - and most importantly - the local hospitality industry and our community.

The Destination Strategic Plan's goal is to generate demand and engagement for the destination, thereby creating value and revenue for the industry and stakeholders. Yet our priority is to strategically manage tourism in a balanced and sustainable manner consistent with economic goals, cultural values, preservation of natural resources, and community perspectives.

Visit Billings is funded primarily through the Billings Tourism Business Improvement District (BTBID), which assesses \$2 per occupied room per night on all hotels and motels in the city of Billings with six (6) or more sleeping rooms. The BTBID funds stay local for the marketing and promotion of the city as a destination. Additionally, there are two Montana taxes imposed on users of an overnight lodging facility (such as a hotel, motel, campground, dude ranch, and guest ranch), which are collected by the facility and remitted to the Montana Department of Revenue. These two taxes are a 4% Lodging Facility Use Tax and a 4% Lodging Facility Sales Tax, for a combined 8% state lodging tax. Most of the Lodging Facility Sales Tax goes to the State of Montana's General Fund while Visit Billings receives a small portion of the 4% Lodging Facility Use Tax.





THE IMPORTANCE OF TRAVEL

A destination leadership organization's (DLO) value is greater than just generating hotel room nights. The DLO helps build the destination's brand, supports local businesses, and increases awareness of the destination. Tourism is one of Billings' greatest economic drivers, creating jobs while stimulating economic growth and development for the local community. Visit Billings understands its responsibility is to drive tourism revenue that ultimately improves the quality of life for the city's residents. Revenue generated from visitation helps increase the local tax base.

Approximately 2.6 million people visit Billings annually, spending \$621 million. Tourism supports more than 10,000 jobs locally in the Billings' area. With a newly renovated Billings Logan International Airport, exceptional lodging (more than 4,200 sleeping rooms) and convention accommodations – including a 10,000-seat arena – and Billing's proximity to natural wonders and heritage sites, Billings is a choice destination for regional, national and international visitors.



THE LANDSCAPE

Billings serves as a regional economic hub for the state of Montana, well-known for its diverse economy to include healthcare, energy, agriculture, natural resources and of course tourism. Traveler motivations, behaviors and financial considerations have shifted, which creates new opportunities for Visit Billings and its partners and stakeholders.

Previous research also has identified challenges to tourism such as public safety; air service; workforce; funding sources and taxing structure; as well as facility offerings compared to the competitive set. As the city evolves, entities like Visit Billings, the Billings Chamber of Commerce, Big Sky Economic Development and political leadership are engaged in collaborations as to how the city should address critical issues such as product development, workforce development, affordable housing, public safety, and improving the quality of life for Billings residents.

In the past, the Billings Chamber of Commerce has stated that one of its top legislative priorities is supporting a local option for tax authority. A local option tax gives city, county and other municipal governments the ability to tax themselves, usually through some form of a sales tax on certain items. The tax would need to be approved by voters. The rise in tourism is creating a need for the local-option tax. The Billings Chamber noted that when visitors spend \$621 million in the Billings area annually, a 1% tax with a suggested cap of 3%, would have generated \$18.6 million. A local option for tax authority would give Billings the flexibility to improve its own roads, water systems and other infrastructure. Montana is one of only five states nationwide with no statewide sales tax. Oregon, Alaska, Delaware and New Hampshire are the others. Without that local option, the only funding mechanism is relying on avenues like increases in residents' property taxes.

Over the past two years, tourism visitation has surged - at times, beyond even pre-pandemic numbers. Yet we also see how natural disasters such as flooding can quickly impact visitation and tourism revenue. Because issues like wildfires and flooding will continue to challenge Billings' visitation, the Strategic Plan must take those factors into consideration. For example, during the pandemic and historic floods of 2022, Visit Billings and its agency partners quickly evolved the marketing strategy. The Visit Billings team worked hard to reorient visitors due to Yellowstone National Park and Beartooth Highway closures, while continuing to drive travel to Billings and the region.



THE OBJECTIVES

Experience has shown us that a successful strategic plan requires the involvement and engagement of the Visit Billings team and industry stakeholders, but also those of visitors, meeting and sports planners, tour operators as well as the local community. Therefore, the strategic planning approach was designed to collaborate with each of these critical audiences, so that the final strategies are embraced - and the community and stakeholders are true advocates who are committed to helping move the plan from recommendations to action.

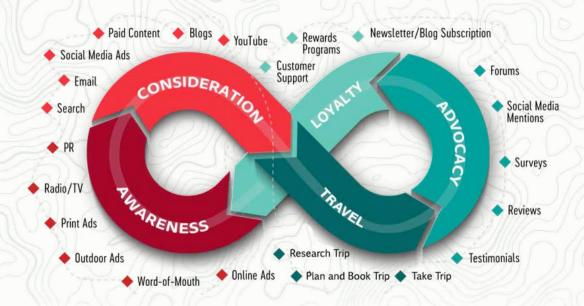
Ultimately, the Destination Strategic Plan was designed to accomplish the following objectives:

- Identify actions and activities that will benefit the local economy, as well as improve the quality of life for the community.
- Recommend actions and activities to increase visitor flow across all segments (leisure, meetings, group tour, sports).
- Assess gaps in the tourism, sports, meetings and cultural infrastructure to identify potential new or enhanced tourism demand generators.
- Assess and define product development needs while identifying growth and expansion opportunities for Billings.
- Identify a process that allows leadership and internal teams to prioritize the resources needed to achieve the goals and objectives, and outline how to measure each goal.

THE INFINITE LOOP

The traditional marketing funnel is outdated in today's constantly-evolving world where community, travel and experience sync. Today's consumers rarely go from the top to the bottom of the traditional funnel to make a travel purchase. They often enter, exit, and re-enter at different stages of the consumer travel journey based on their needs and wants. Thinking in terms of a funnel leads to DMOs thinking of consumers as a "one-time purchaser," which then fails in developing and nourishing long-lasting and meaningful relationships with visitors.

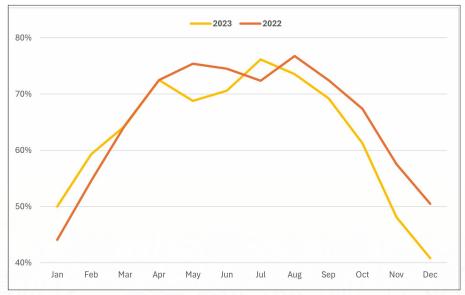
Instead of trying to force consumers into the linear purchase path of the past, Visit Billings can instead leverage its marketing strategy around the Infinite Loop, which builds around traveler behaviors from the dreaming to the in-market to the return-trip planning phases. The infinite loop has no start or end point, therefore empowering Visit Billings to establish more meaningful relationships with consumers/travelers that ultimately result in brand loyalists, repeat purchases, and greater spending.





HOTEL OCCUPANCY:

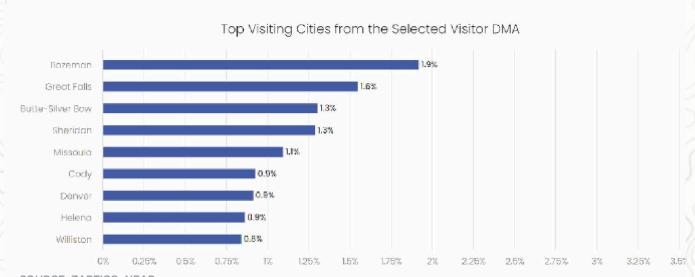
62.9% (2023) 65.3% (2022)



SOURCE: STR

TOP 10 ORIGIN MARKETS

Date range Trip Type: Visitor DMA: Last year > Overnight Stay > All >



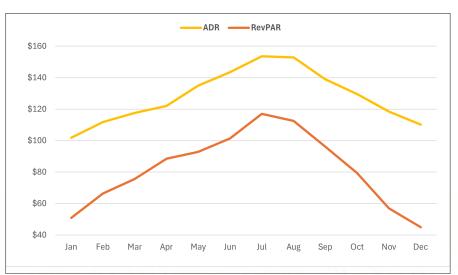
SOURCE: ZARTICO, NEAR

2023 DATA

ADR: \$130.27 (+7.5% FROM 2022)

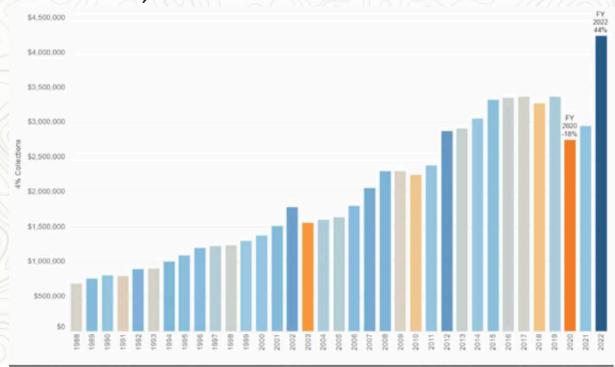
REVPAR: \$81.89 (+5.3% FROM 2022)

ROOM DEMAND: 1,030,539



SOURCE: STR

2022 TOURISM CONTRIBUTES \$4.2M IN TRANSIENT OCCUPANCY TAX REVENUE (STATE AND LOCAL)



Inly years with 4 quarters of data are shown with one exception: CVBs when fiscal year is selected he minimum and maximum growth years are labelled with the year and percent change. In this page will only show a single geography at a time. Begin by selecting a geography type, then select a geography name

Fiscal or Calendar Year Fiscal Year Year-Over-Year Growth



THE APPROACH

This Destination Strategic Plan is a road map for identifying key goals and initiatives that will drive Billings' visitor economy for the next three years. Travel and tourism industry input from stakeholders throughout Billings formed the backbone of this strategic plan. As such, our strategic planning team - which included the creative agency of record for Visit Billings, Sunshine & Bourbon; a Senior Market Researcher/Strategist with Pratt Street Communications; and the President of Esra Calvert Consulting - conducted one-on-one interviews, in-market and virtual focus groups, as well as an online survey. Over 270 industry stakeholders from different sectors of our economy as well as over 37,000 past visitors were invited to participate in the process. More than 377 stakeholders and past visitors participated, and this plan was developed leveraging their guidance. It identifies a series of organizational goals and key strategies to most effectively achieve our collective objectives.





THE METHODOLOGY

Consultants for Visit Billings evaluated economic and market research, travel trends, competitive and consumer research, along with stakeholder engagement to chart the way for future strategies. That combination of primary and secondary research utilized new and existing research, to include:

- · A series of one-on-one interviews with a meaningful cross-section of individual stakeholders
- 32 in-depth focus groups, both virtual and in person
- A digital survey designed to seek a broader base of input with stakeholders in industries that
 included accommodations, retail, restaurant, economic development, meetings and sports
 events, and more
- Market analysis
- Trend analysis
- Lodging demand analysis
- Product development analysis
- Sports analysis (to include the assessments listed below)
- Gap analysis

We combined this knowledge with the extensive research that Visit Billings and other Billings organizations have conducted in previous years which includes - but is not limited to - Destination Analysts' 2017/2018 Billings Visitor Profile, the Yellowstone County Sports Facility Market Needs Assessment by Victus Advisors, the Downtown Billings Alliance Strategic Plan, University of Montana Institute for Tourism and Recreation Research report on "Montana Residents: Attitudes Towards Tourism 2021," Big Sky Economic Development's Strategic Plan, Coulson Park Master Plan, Billings Multi-Generational Recreation Center Master Plan, Big Sky Economic Development's ThinkBillings Economic Overview, and more.





To track and measure campaigns, the Visit Billings staff in partnership with agency colleagues monitor the following data:

- Smith Travel Research demand, occupancy and ADR (average daily rate)
- TBID assessments
- Collections from State Lodging Facility Use Tax
- Destinations International Economic Impact Calculators
- VisaVue spending trends
- AirDNA data
- Destination Analysts reporting
- Zartico

SPECIFIC RESEARCH METHODS USED TO DEVELOP THIS STRATEGIC PLAN:

Visioning Workshop with the Strategic Planning Steering Committee

An initial visioning workshop was held in Billings to kick-off the strategic planning, to gain broad input and develop priorities for opportunities and challenges in Billings that might be addressed by the Destination Strategy. An open and inclusive conversation was held with the Project Steering Committee regarding destination strengths, weaknesses, opportunities and threats, which elicited a broad and diverse collection of thoughts, ideas, opinions and perspectives.

One-on-One Key Stakeholder Interviews

A series of one-on-one interviews - virtual and in-person - were conducted with hoteliers, cultural partners, Southeast Montana representatives, general tourism partners, restaurateurs and brewers, as well as locals whose influence are important to business, economic development and tourism. Stakeholders included Board members, key industry leaders, private sector leadership, as well as political leadership and those with key roles in the public sector. Here we delved deeper into understanding community issues and trends that would impact our decision-making process. Online survey of stakeholders and residents

Online survey of stakeholders and residents

The survey allowed us to quantify ideas and gave us a larger report of public opinion, ranking and prioritizing ideas and opportunities. Respondents explored both highlights and gaps in offerings they believed businesses, investors, partners, meeting/sports planners and visitors experience. They also were given the opportunity to imagine the city in the coming decade, and what needs to happen to realize that vision.

Online survey of past visitors and consumers who have engaged with Visit Billings

To better understand the mindset of the leisure traveler as it relates to tourism product, services and competitive destinations, we conducted an online survey of recent Billings' visitors who reside in key feeder markets to assess their perspectives of tourism products, lodging, restaurants, retail, outdoor/indoor activities, festivals and events. The results of both the surveys and the focus groups were used to leverage the research already conducted by Visit Billings and other local organizations, while further identifying the gaps and opportunities from the consumer/target audience perspective.

Industry Focus Groups

We conducted 32 focus groups and one-on-one interviews with well-established meeting planners, sports event organizers, and tour operators in our key industries and feeder markets to delve into the buyers' decision-making process and better understand how they view Billings compared to other competing destinations. The topics of the focus groups included: hotels, restaurants, retail and attractions; sports facilities; meetings, conventions and group facilities; DMO services; events and programming; and tourism branding and icons.

Product Development Workshops

Because product development is so critical to growth, we hosted virtual and in-person workshops and one-on-one interviews with City leadership, major industry representatives including healthcare and education, tourism marketing and management professionals, economic development interests, facility management, planning departments, as well as those stakeholders who benefit from tourism including hotels, restaurants, retail and attractions/ experiences.

Competitive Analysis

We aligned information gleaned from the research against similar assets from the competitive set to better understand perceptions of where Billings is leading or lagging. We reviewed current and previous research and proposals conducted for Billings from major projects to ensure we understand the full landscape of Billings' development.

KEY NATIONAL AND REGIONAL TRAVEL TRENDS

While trending data evolves over time as traveler behaviors and motivations shift, some travel trends hold true for years. Below is trending data that has proven to be relevant at the launch of this report, and while there is always a need to revisit trending data month over month and year over year, the following research is anticipated to remain valuable insight.

STATE OF THE AMERICAN TRAVELER IN JANUARY AND FEBRUARY 2024

- The percent of American travelers who feel the U.S. will enter a Recession has dipped to under 45%, a post-pandemic era low, according to Future Partners (formerly Destination Analysts). The percent of Americans who are being careful with their money because of recessionary concerns, while a majority at 56%, also remains at a post-pandemic low.
- Just over 50% of American travelers anticipate they will be better off financially in the next year compared to the previous year, up 2-points from the same point last year. Nearly one-third of American travelers say the present is a good time to spend on travel, up over 10 points compared to a year ago.
- However, make no mistake: costs continue to be the leading concern weighing on travel. Although down from a year ago, the top deterrents to travel are trip costs being too expensive right now (37%) and personal financial reasons (34%). Perceptions of the high cost of travel are also playing out in what American travelers are predicting for 2024.
- Notably, 56% say "More travelers will avoid (or select) destinations based on their personal politics, 55% say "With higher temperatures each year, travelers will try to seek out cooler places."
- 17% of American travelers now saying they have used AI tools to specifically plan or prepare for trips in the last 12 months (up from 16% last month and 8% in six months ago). ChatGPT remains dominant (cited by 63% of AI-tool using American travelers), with Trip Planner AI (28%) and TripAdvisor's AI-powered assistant rounding out the top 3.
- Trip planning windows continue a pattern of shrinking, according to Future Partners in February 2023. On average, American travelers report they would plan a week-long domestic trip just 9.8 weeks in advance, down more than 2 weeks from a year ago.
- American travelers continue to express excitement for cities (47.7%), small towns (44.8%) and national parks (41.2%), according to Destination Analysts.
- According to a survey by GetYourGuide, 90% of travelers want to experience a destination "like a local" and two-thirds of Millennial respondents specifically worry about whether it's an authentic experience.
- For destination inspiration, Millennial and Gen-Z age travelers are particularly open to content through video sources like social media and streaming services. TikTok and streaming services appear to have cemented their status as top resources Americans turn to for travel inspiration, along with email marketing, Instagram, Facebook, search engines and other online content, according to Future Partners.
- Interestingly, 10% of American travelers now cite travel podcasts as sources of inspiration. The genres American travelers tune into most include health/fitness, pop culture, sports, comedy and news/politics.
- "Set-jetting" is still on the rise 70% of Gen Z and Millennial respondents have "been inspired to travel to a destination after seeing it featured in a TV show, news source, or movie" like Yellowstone, according to a report by American Express Travel.



THE FOLLOWING IS A SUMMARY OF THE KEY FINDINGS DERIVED FROM ALL THE RESEARCH METHODOLOGY OUTLINED ABOVE. IN THIS STRATEGIC PLAN, THE RESEARCH FINDINGS ARE OUTLINED FIRST, AS THEY ARE MEANT TO INFORM AND GUIDE THE RECOMMENDATIONS THAT ARE LISTED AFTER THESE FINDINGS.

CHALLENGES WITH IDENTITY

Throughout all the research conducted, many stakeholders expressed a common belief and frustration that Billings lacked its own unique identity - one that is more than widely accepted, but also advocated for and shared proudly with friends, family and visitors. Without prompting, quite a few stakeholders commented on the limitations of Billings "trailhead" positioning. They felt it was vague in its description of the region, and encouraged people to leave the city and travel elsewhere.

While this can be viewed as more of a challenge for the city, it is noted that tourism branding and positioning should reflect a city's authentic identity, as defined by collectively its visitors, residents and stakeholders. Often, the tourism brand for a city is adopted by locals to show their community pride. When locals strongly advocate for a city's brand, they then share that pride in their engagement and interactions with visitors. So any challenges with the city's identity also affect Billings' tourism brand and visitor experience.



This suggests the importance of defining the sum of the Billings/Southeast Montana experience in terms other than simply a list of potential sights. Clarifying the totality of the region evocatively would simultaneously grant potential travelers a clear sense of the area's uniqueness, provide creative impetus for business entrepreneurs to build tourism experiences that lend further support, and support Chamber strategies such as business and workforce growth. Billings needs a rallying cry – something to share with others showcasing residents' pride in their city.

"We need to embrace and embody who we are."

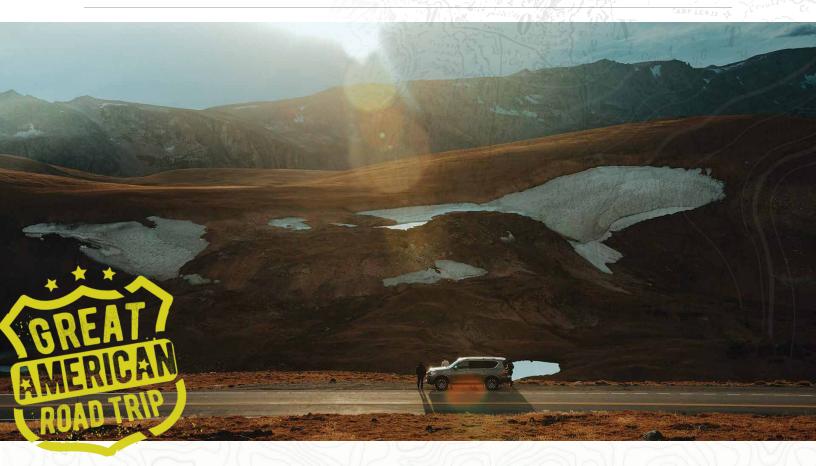
"What is Billings' story?"

"We have so much potential. The largest city. A downtown poised for growth. We are the hub for the region, and the center for major industry and business in the state of Montana."

The geography of Billings should be leveraged for its uniqueness. It encompasses the character of the people - where authentic cultivators of the land meet creativity and urban culture. It suggests a degree of spaciousness no longer afforded in other parts of the state, where there may be resident sentiment of over-tourism.



VISIT BILLINGS | STRATEGIC PLAN 2026



Additional impetus to define Billings and Southeast Montana more precisely, arrives in the shift of the state's tourism strategy. Visit Billings and Visit Southeast Montana have been in ongoing conversations with Brand MT (representing the Office of Tourism team at the Montana Department of Commerce) to define resilience planning for Montana, through the Montana's Tourism Resiliency Planning Project. This is in conjunction with Corragio Group and each of the distinct regions including Southeast Montana. This collaboration is reflected in the Eastern Montana Tourism Initiative, a project of the Department of Commerce and Brand MT, in collaboration with Visit Billings and Southeast Montana Tourism leadership. The Eastern Montana Tourism Partner Initiative has awarded funds to eligible entities in Eastern Montana that demonstrate investment in tourism infrastructure, ensure asset development, and promote long-term sustainability in growth policy and community development.

"The state took a hit after 2020. Montana had a huge comeback, but it was more than we could bear ... Huge masses of people in Glacier and Yellowstone. Crowding problems there got even worse. So, our new strategy is dispersal."

About 5 million people go to Glacier and Yellowstone in a year. Visit Billings' marketing campaign creates a greater awareness for the vast variety of offerings within the region, including Downtown Billings, Southeastern Montana and the historic landmarks.

"Three quarters of people who go to Montana for the first time go to either Glacier or Yellowstone...We are trying to drive Southeastern visitation on their first trip. We need to continue building that story."

VISIT BILLINGS | STRATEGIC PLAN 2026



Research participants wanted to showcase the personality and characteristics of Billings, and there was quite the range of attributes shared.

"Celebrate the River and the Rimrocks."

"We are a railroad city."

"We are the place where people put down roots."

"The city is "gritty" and real. Focus on Billings as the 'real Montana."

When asked what stakeholders felt were Billings' differentiators, more often than not, the vast array of outdoor adventures available were highlighted, as well as the Billings locals themselves. Their pride is immense. In fact, they shared that the outdoor experiences were a large part of why they chose Billings as their home. From hiking, biking, fishing and fly fishing in particular, birding, trails, mountain biking, hunting and nearby skiing, Billings offers complete access to the outdoors - which includes its proximity to Red Lodge and the Beartooth Highway. Billings stands out as an urban destination with the serenity of the outdoors, the city's canvas. The tourism industry is expected to communicate the promise of protecting that outdoor canvas as the visitor economy grows.

"The people of Billings. There's a different culture here. It's real Montana."

"We are in a city environment, but within 5 minutes, you can be out in the middle of nowhere."

Creating that identity may go a long way in building an even greater wave of support for tourism and advocacy for the city overall. The tone of the conversations demonstrated that this has been a topic of debate for many years.

"We have an inferiority complex."

"We need to do a better job of marketing and branding ourselves TO ourselves. We tend to lead the conversation with an apology - 'sorry we aren't Bozeman...'"

"We need to make Billings a destination, not a stopover."

BILLINGS AS A HUB FOR THE REGION

Stakeholders frequently discussed Billings as the "hub" for the entire region, particularly in the areas of industry, healthcare, banking, shopping and the airport. For example, a significant number of visitors staying in Billings are there for medical needs. That will only continue to grow as the healthcare organizations continue to grow. For example, Intermountain Healthcare announced plans to build a multi-million dollar "replacement" hospital at its current Billings location. The new hospital will be located along North 27th Street, the main route running from I-90 through downtown up to the airport. Officials say the central location is strategic and designed to help to serve the region. These types of investments - as well as the healthcare industry's need to recruit a larger workforce - will be critical to the future development of Billings.

Recruiting and retaining a strong workforce is a crucial issue for the tourism industry and those in industries such as healthcare. Hotels and restaurants cannot provide the level of service that travelers have come to expect without their front-line workforce, and several stakeholders within the tourism industry stated that these are challenging times. That is in part due to lack of affordable housing, according to stakeholders. J1 workers and visas in general also are priorities for stakeholders. The Chamber of Commerce's DEI initiatives can assist in making all residents, workers - temporary and permanent - feel welcome.

Billings organizations such as You Belong in Billings, BillingsWorks, and Better Off in Billings have already initiated robust recruitment initiatives where Visit Billings is a key contributor. For example, BillingsWorks is a dynamic collaboration of Billings businesses and organizations hosted by Big Sky Economic Development that brings together partners and resources to anticipate and respond to community workforce needs, while developing key strategies and providing essential information. The Chamber also partners with area high schools and colleges for internship programs. In addition, NextGEN, a program of the Billings Chamber of Commerce, is a leading social and business networking group made up of motivated young professionals focused on fostering relationships among young professionals, developing business opportunities, and supporting civic involvement. These types of programs help retain graduates to stay in Billings and develop strong employment options for them.

If at some point in the future the stakeholders situation becomes dire, resulting in Visit Billings seeking to become more directly involved in recruitment specific only to tourism, the organization can look at other destinations where DLOs have collaborated with other city organizations to focus on the issue of workforce development. For example, Visit Baltimore created an independent 501(c)(3) nonprofit foundation dedicated to developing Baltimore's workforce and strengthening its tourism community. One of their foundation's initiatives is to offer academic scholarships to area college students who move into the hospitality industry. The foundation also offers \$2,000 in professional development awards enabling working professionals in the hospitality and tourism industries to begin or advance their formal academic education within those industries.



PRODUCT DEVELOPMENT & FUNDING: DOWNTOWN AND BEYOND

Most stakeholders viewed ongoing investment in Downtown Billings as an essential component of future strategic planning. Comments suggest that Billings should embrace its status as Montana's big city, but the current iteration of the city's downtown and urban amenities do not match other American cities of this size. Billings' footprint, appearance, and character make it unique within Montana.

"It's the most urban city in the state. That's the feeling of the place. It could be a differentiator."

When Billings' stakeholders were asked in the online survey what the top priority was for the city to grow tourism over the next five years, 56% said it was to increase product development in the Downtown area to include hotels, retail and attractions; while 58% said it was to develop more meeting facilities to drive meetings and conventions.

Discussion of funding for future Billings development consistently pointed to private and corporate dollars. It seems clear that public taste for tax increases is challenging, making it difficult to introduce a local option tax. There appear to be numerous private funding sources for which a business case would need to be made. Potentially, the business case for investment could link back to recruitment success and retention. In some instances, corporate social responsibility goals align with public health (healthcare providers) and Native American interests (First Interstate). And companies like Coca-Cola-which just established the new Coca-Cola Distribution and Manufacturing Center in Billings - frequently support the communities in which they reside in focus areas such as sports and entertainment venues.

Yet, the lack of a critical mass of storefronts, residential options, restaurants, and entertainment in certain areas of the city like Downtown - combined with persistent sense of vagrancy - deliver an inconsistent experience. While the West End is booming with new growth in retail, stakeholders noted that when walking through Downtown Billings, one street will be vibrant, and the next will be almost completely vacant, giving the feeling of being "unsafe." Frequently, stakeholders mentioned "disconnects" between key areas such as the hospital corridor and Downtown, as well as Downtown to East Billings to Metra. Areas like The Heights and the divide between the railroad tracks were mentioned as areas of concern. Stakeholders noted the older buildings that lay vacant throughout the Downtown area that could be repurposed to bring vitality back to the city. Further, some stakeholders mentioned a need for a convention center in Downtown Billings.

Billings possesses multiple areas underpinned by entertainment and recreation venues ripe for incremental development. The vision for a Billings interconnected urban network includes building hospitality amenities (restaurants, retail, recreation) from Coulson Park to Downtown to the hospitals and MSU Billings to MetraPark Arena. The overarching goal would be to holistically develop Downtown Billings and circumference into a vibrant constellation of activity. By investing in mixed-use development, the spaces throughout Downtown Billings would feel safe, clean, and rich with opportunities to engage in activities (more retail, restaurants, Yellowstone River viewing, interpretive signs, etc.)

"We need it to feel like it does on Sunday mornings, when the breakfast spots are jamming. A quiet downtown feels desolate."

"We need to take a big swing. It's fine if it's not everything, but we have to do something. We need to figure out a way to invest in ourselves, and just do one thing to begin."

A key idea emanating from stakeholder conversation was a multi-phased investment in building a cohesive, immersive downtown in Billings connected by safe recreational trails and walkways. Yet lack of funding and a political atmosphere that sometimes feels "stifling" to progressive development were key barriers to growth. Research suggests a much larger collaboration that leads to a master vision plan could jumpstart a development cycle. Key themes include:

- Incentivizing developers, creators and retailers would attract more vibrancy.
- More people living in downtown would attract more retail and entertainment.
- · More investment in trails and amenities would entice more visitors and locals to visit.
- More collaboration among social services providers and first responder teams to alleviate safety concerns and enhance the quality of the downtown experience is needed.

"City Council and developers are critical to product development. All the Boards help Council members understand the projects, but are we incentivizing developers to actually make ideas happen?"





In short, creating more interconnectivity in downtown Billings as well as critical infrastructure development throughout the city would deliver both tourism and quality of life advantages that, in turn, could help businesses and universities recruit as well as give visitors a reason to extend their stay in Billings. Critical to this will be the resident support.

The mindset of Billings political leadership and some residents were consistently mentioned as an impediment to progress. The thought was that any discussion regarding product development needed to first explain how it would benefit residents and secondarily include conversations about how to fund it. However, it was noted that Billings has seen an influx of new residents, and with that, the city may see a slow cultural shift.

"The mindset is, 'This is Montana. We are good with what we have.' ... We are aging as a community, and the Montana mindset is a bit closed."

"There's an ingrained culture of 'It's good enough,' which may be a part of Billings' agricultural history."

"Until Billings invests in itself, there won't be any outside investment."

"It's led to profound frustration and cynicism."

"How do we start a larger conversation?"

It is important to note that while much of the conversation is in regards to downtown product development, there has been significant development in other neighborhoods throughout the city including the Heights, the West End, and in Midtown. Much of Billings' visitation is centered in these areas - especially for family and sports travel - as only four of the hotels in Billings are located in the downtown area. In the West End alone, four new hotels are in development. One of those is located in the old Carmike theater on Overland Avenue, which is being transformed into a 22,500-square-foot convention center. In a few years, a new Marriott Courtyard hotel will open next door. The new event center will offer seven meeting rooms. Creating greater awareness for the districts and neighborhoods throughout Billings - as well as what is new in each of these areas - will be imperative for the marketing campaigns.



PRODUCT DEVELOPMENT: RIVERFRONT AND NATURAL RESOURCES

When Billings' stakeholders were asked in an online survey what the top priority was for the city to grow tourism over the next five years, they overwhelmingly (63.64%) stated that it was to develop the waterfront area to offer more recreational activities. The natural amenities in and around Billings are enjoyed by stakeholders, but most acknowledge significant challenges associated with access to some recreational areas.

The Yellowstone River was referenced as a development opportunity albeit one that poses challenges associated with natural fluctuations and other development interests. Many stakeholders identified riverfront development as a "missed opportunity that is critical for growth." Conversations delved into the range of opportunities - from trails as well as riverfront retail, restaurants and entertainment to more seasonal opportunities including adventure outfitters who offered visitors the opportunity to access the river.

Stakeholders expressed impatience with the Coulson Park Master Plan, and its perceived lack of progress. Almost all stakeholders agreed that this was an important community investment but that there was not enough forward momentum - or public communication - regarding the plan's implementation. Again, Visit Billings' support and advocacy for future bond initiatives will be important in helping move this forward.

"Coulson park needs to be renovated. The Yellowstone is huge, but it needs to be accessible by trails and to develop the riverfront."

"Love to see an entrepreneur put up a rental shack down by the River - seasonally. Visitors ask all the time how they can access the river. We need an outfitter."

"We are missing the boat big time."

The Rimrocks were described as Billings' signature site. Yet, many acknowledged limitations of the current trail system that grants access to the Rims and connects them with other trails around town. Marathon Loop is an example of a project which has gained quite a bit of enthusiasm amongst stakeholders, as it aims to connect the Rims with the Yellowstone River and neighborhoods around Billings. Marathon Loop, including all its component parts, offers benefits from tourism, quality of life, and workforce recruitment perspectives. The grand opening of the Skyline Trail is another strong component of the trails system, which should be strongly marketed to visitors as part of the larger outdoor adventure package that Billings features. This should be considered a success in terms of securing grant funds to accomplish the Skyline Trail.

"TRAILNET is strong, but funding is an issue."

It is also noted that there have been many Master Plans developed years ago, which are viewed as not achieving notable traction - plans such as Parks, Recreation and Public Lands Comprehensive Parks and Recreation Master Plan and the Coulson Park Master Plan. There is a frustration amongst stakeholders that these projects which are viewed as strongly needed for both residents and visitors have a huge amount of research that showcases their potential - as well as a groundswell of support from tourism stakeholders and some residents - but have not progressed.

Stakeholders blamed this lack of momentum on two focus areas, the first being a lack of creative thinking to find funding other than taxing residents. They also felt there was a lack of widespread collaboration and promotion with residents, the business community and political leadership so each of these audiences thoroughly understands the benefits of moving these projects forward.

While a local option tax has been brought up for political consideration - similar to those in Oklahoma City, Sioux Falls and other communities - those efforts have not been successful, which means that there is very little funding mechanisms other than taxing residents and competing for a smaller pool of corporate dollars. Projects like investing in the Billings Public Schools were cited as outcomes of success because they first ensured that they went "door-to-door" to explain why the project was needed, and secured overwhelming support from the residents.





In terms of marketing, many stakeholders felt that the city should package its outdoor offerings to more aggressively promote the city for its full-range of outdoor adventures. That includes mountain biking, golf, hiking, fishing and fly fishing in particular, birding, trails and nearby skiing. In regards to mountain biking, some suggested that Billings should seek IMBA (the International Mountain Bicycling Association) certification, given that only Helena currently is represented in Montana. Hunting was also mentioned as an opportunity to increase visitation, given that (anecdotally) during hunting season, those traveling to Billings to hunt tend to spend more at the hotels and restaurants.

"There are stellar mountain biking trails that are unknown. Visitors don't even know. And the more trails we can get, the better."

As a gateway destination, Billings' visitation will always be tied to Yellowstone National Park, so it is important to track visitation - as well as any new campaigns or messaging from the National Park Service. Events like the historic flooding event in 2022 can dramatically alter Visit Billings' marketing initiatives. However, historically, Yellowstone National Park is seeing increased visitation numbers - particularly after the pandemic. The park hosted 4,860,537 recreation visits in 2021, up 28% from 2020 (3,806,306 visits), making it the busiest year on record. In 2021, visitation for May, June, July, August, and September were the busiest on record. July was also the most-visited month on record in Yellowstone's history and the first time visitation exceeded 1 million visits in a single month. Visit Billings can align itself with any promotional campaigns from the National Park Service, while also providing visitors with logistical information regarding their travel to Yellowstone. Further, Visit Billings' marketing campaigns should encourage those traveling to Yellowstone to stay longer in Billings during their trip by promoting the outdoor adventure and cultural amenities offered in the city.



MEETINGS AND SPORTS TOURISM

Local Stakeholder Perspective

Many stakeholders shared a sentiment that Billings needs to "lean in" to sports tourism as it would provide both a greater quality of life for residents, but also a strong source of tourism revenue. When Billings' stakeholders were asked which priority was the most important to grow tourism over the next five years, develop more sports facilities and increase sports bookings was rated numbers 1 and 2, respectively. When asked which destinations they considered to be Billings' competitors in meetings, sports and conventions, Spokane and Boise were considered number 1 and 2 respectively. Note that Billings has a room supply of more than 4,200 rooms, whereas Rapid City, Sioux Falls and Boise all capture a higher market share which could be attributed to the presence of a convention center and group market. Billings holds a competitive position compared to Sioux Falls and Rapid City for ADR and RevPar, yet Boise has surpassed Billings in both. However, Billings is positioned as a more economical destination for sports.

Stakeholders were excited that Visit Billings recently hired a new position dedicated to promoting sports tourism for the city. In particular, development of a sports tourism venue was mentioned by several stakeholders. Specifically, it was felt that the ability to host a NCAA or Big Conference tournament type of event would build both visitation and awareness for Billings. For those stakeholders who were already benefitting from sports tourism, they understood the economic impact that a sports venue can bring to a city, while further building year-round visitation. There was strong support for the idea of increasing the number of tournaments hosted in the city, while also benefitting families who are currently driving incredibly long distances to compete in a wide range of sports.

Billings has historically leveraged its own successes, such as the NAIA 2017-2020 and NCAA events. And while Billings currently "owns" some events, there is always the opportunity to expand that scope while leveraging what the city has already accomplished including the 200 team outdoor 3x3 basketball tournament that Visit Billings secured in 2021. Knowing that, for sports events, attendees and families will travel from 200 to over 400 miles away, there is a huge opportunity to grow Billings' share of the market.

"The city could own more events. People come from over 100 miles away for sporting events. For example, there's a huge hoop fest in Spokane. Spokane Hoopfest is associated with that city. We're lacking in sporting facilities that can host big events."

"Sports is a huge opportunity. We're missing a place for people to attend large sporting events like hockey, indoor soccer, or basketball."

It is important to note that on February 13, 2023, the Billings City Council voted 8-1 to approve design concepts for the proposed new sports complex/rec center. The design concepts were created by A&E Design in Billings and include two sheets of ice, a large pool, basketball courts and other amenities. Currently, however, in 2023, voters rejected a vote on the bond for the facility. Some stakeholders in the research shared concerns regarding how the venue would be funded to remain sustainable throughout the life of the venue. Others expressed concern that there wasn't enough publicity for the venue showing residents how it would benefit them.



In the research conducted specifically for the Billings Multi-Generational Recreation Center planning, stakeholders were asked what key goals defined success. Their responses align with the research done for this Destination Strategic Plan. Those responses include: Utilize a funding mechanism supported by the community (should not be a major tax burden); incentivize private donors; stay focused on the core programs: ice, aquatics, and courts; create a community rec center for ALL people; inclusive of traditional and nontraditional spaces / activities; have clear operational strategy for how facility will be run; and push the limits and create a big picture vision for what's possible for recreation and wellness in Billings.

ECONOMIC IMPACT OF YOUTH SPORTS

The Aspen Institute estimated U.S. families spend \$30 to \$40 billion annually on their children's sports activities.

"The economic impact of amateur and youth sports tourism is staggering. According to the Sports Events and Tourism Association, \$39.7 billion on the direct spending impact of amateur and youth sports tourism in 2021, generated a total economic impact of \$91.8 billion, which resulted in the generation of 635,000 jobs and a total tax revenue of \$12.9 billion for the local economies. In 2019, 179 million people traveled to out-of-town events. During the first COVID-19 year of 2020, travel decreased by 46%, but it quickly rebounded in 2021 by 53% to 175 million travelers. In 2021, sports-related travel accounted for 66.5 million nights families spent in hotels. Travel is essential because hotel tax revenue finances many sporting venues across the country. Since 2005, the annual growth rate of amateur and youth sports tourism has been 5.9%. All these statistics point to accelerated growth within the industry."

https://www.halff.com/news-insights/insights/youth-amateur-sports-tourism-brings-economic-benefits-local-economies/



Places throughout the country are also recognizing the importance of youth sports, which Wintergreen Research estimates is a \$19.2 billion industry in the United States. Destinations are increasingly aware of making sure that families who travel to youth sports tournaments know the weekend is about more than just the game. "I think youth sports is probably the strongest driver in terms of our market segment," Todd Lehrke, director of sports development for Bloomington Sports in Minnesota was quoted as saying. "So it's huge for us to really try to add on the additional front or backend activities and make it a vacation for the athletes and families."

"It's important to focus on the full experience," Executive Director Marissa Werner of Sports Milwaukee said. "Especially when families and the athletes are not playing or after they're done playing each day, we do our best to always provide economically savvy activities for families and options throughout as we know that staying within budget is important for families, pandemic or not."

FUNDING CASE STUDIES

TEXAS: "Funding for the development of amateur and youth sports facilities comes from various sources. Many communities are using Hotel Occupancy Tax funding for the development of sports facilities. In Texas, the Texas Parks and Wildlife Department provides funding through its Local Park Grant Program. Another source of revenue for developing sports facilities is municipal or county bonds and capital improvement program (CIP) funding. In Midland, a private 501(c)(3) charitable organization is helping fund the development of the Hogan Sports Complex. Soccer teams such as FC Dallas and the Sting Soccer Club are investing in the development of sports facilities on municipal park sites. Additionally, for-profit organizations such as Perfect Game and Big League Dreams are financially supporting the development of youth and amateur sports facilities."

https://www.halff.com/news-insights/insights/youth-amateur-sports-tourism-brings-economic-benefits-local-economies/





BOZEMAN: Planning for the Bozeman Sports Park began in the early 2000's as the soccer community of 300+ youth quickly outgrew the community's only field sports complex. In 2012, official planning began as the number of participants soared to more than 3,000 in soccer, lacrosse, rugby and other field sports, whilst no additional public playing fields were added. After forming several critical partnerships, passing a community bond totaling \$8.4M to purchase land and raising more than \$1.7M in private funds, construction of the project's initial phase began in October 2016 and opened to the public on April 13, 2019. Phase 1 included site preparation, four grass fields, two artificial turf fields, concessions/restroom building, landscaping, parking, playground and more. While noting that many sporting tournaments happen in spring and fall, anecdotally, there is discussion that it may be challenging to market this facility in the summer months, due to Bozeman's higher lodging costs.

Bozeman Sports Parks Foundation raised more than \$2 million in private support to fund the project's initial phase. Coupled with public bond money, this allowed for the installation of four grass fields, two artificial turf fields, a concession building, playground, as well as all major infrastructure, a north boundary parking lot and restroom facilities. Plans are underway for Phases II and III. Once complete, the Bozeman Sports Park will include 80 acres of fully developed spaces including 14 full-size fields/18+ small-sized fields and additional community-based amenities, such as covered picnic areas, a fenced dog area, walking trails, and more. The combination of concentrated field space, some with synthetic surfaces, and supporting amenities, extends the playing seasons and gives Bozeman the opportunity to host multiple, multi-day tournaments. And, in doing so, the city expects to reap enormous revenue. The research shows that multiple large-scale tournaments could conservatively generate \$6 million annually from 8,000-20,000 new visitor days, 3,400+ additional hotel room nights, and innumerable additional meals, gallons of fuel, and retail sales. Moreover, the BSPF estimates that the community's 3-year ROI would be \$24,379,407.

http://www.bozemansportsparks.org/

MEETING PLANNER/SPORTS EVENT PLANNER PERSPECTIVES

In focus groups with meeting planners and sports event planners, they were open about sharing the opportunities for Billings in meetings and sporting events, while also discussing some of the challenges the city faces.

One planner felt strongly that Billings needs a convention center with a large anchor hotel. "We're going to have to shuttle people from overflow properties... It's not ideal, but we're making it work. Attendees don't want to be put on shuttle buses. (They) need a 600-700 room hotel attached to a convention center."

Billings is poised to capitalize in areas like cost, while needing to be aware of factors like lack of competitive sports venues, a downtown convention center and flight costs. Cost is a leading criterion in location selection for meeting planners, but its importance should be viewed in the context of other factors including ease of travel to a destination (air seats, drive miles), size of available meeting space, proximity of meeting space to other amenities (rooms, restaurants), and service delivered by representatives of the city (Visit Billings, venue management, hotel management). These factors, along with the opinion of influencers (Board members, state chapter reps) collectively affect how meeting planners view a potential destination.

For sports event location selection, facilities (competition space, seating capacity, parking) and affordability are the top criteria. First and foremost, a location must have quality space of a certain magnitude to accommodate attendees and participants. After those criteria are met, a variety of factors are considered including hotel availability/affordability.

Both meeting planners and sports event planners mentioned the importance of service in the equation of site selection. Service was described in a variety of ways: from knowledge of the destination-at-large to the presence of people helping to troubleshoot during an event. In most instances, Billings received high marks, but it was mentioned that there is room for improvement.

"It would still be nice to have people from the venue present and available to help. Ready and willing to make it better. ... It would just be nice to have a guy standing next to me. More of a presence would result in better event management."





INCLUSIVITY AND NATIVE AMERICAN COLLABORATION

Some stakeholders mentioned that Billings lacks a sense of inclusivity in terms of its political leadership, and the projects the city supports. Inclusivity is becoming increasingly important for the city, as while 87% of residents are Caucasian, the Billings' American Indian population has grown 13% in 10 years, and the African American population is up 25%. Billings' Asian Pacific Islanders population has also increased by 42%.

Several stakeholders agreed that there is sometimes an expectation amongst visitors that they expect to experience more Native American culture. Stakeholders considered experiences that would allow travelers to view Billings and Southeast Montana as a must-see part of their itineraries. Creation of a Native American History & Cultural Center in Billings was enthusiastically identified and endorsed by a wide cross-section of respondents.

"A Native American cultural and history museum belongs in Billings. It's the hub for several tribal reservations. ... It would be a big draw."

The totality of these experiences could render Billings an essential destination for Native American education and experiences outside of the Smithsonian's National Museum of the American Indian. In addition, it was mentioned that the city should help to fund Native American events that would show openness, a desire to celebrate the Native American culture, and introduce other communities in Billings to Native American traditions.

One stakeholder also mentioned that the Native American Development Corporation (NADC) recently purchased the Shrine Auditorium building and surrounding property on Broadwater Avenue which includes 50,000 square feet of meeting room space. It was discussed as a possible source of collaboration with both the city as well as those focused on bringing meetings and conventions to the city. Already, the project has been earmarked for \$800,000 of immediate investment to upgrade the facility.

"Some feel that Montana needs to stay Montana, and we don't want outsiders. We aren't more welcoming as a state - we are not more inclusive or diverse."

"Misperceptions abound and no one is responsible for correcting misinformation. ... Communities need a bridge to learn to speak with each other."

"Where is the written history of tribal stories and culture? Native Americans should be integral to telling the written story of tribal knowledge. ... We should be sharing profiles of prominent Native Americans to break stereotypes – they are doctors, lawyers, and MBAs."

"Misinformation happens without collaboration."

As another avenue to consider, because Billings is the gateway to Yellowstone National Park, the DMO can help the U.S. National Park Service further its campaign to welcome more diverse travelers into the parks. A recent study released by the Park Service found that just 23% of visitors to the parks were people of color. In national parks, Black Americans are consistently the most underrepresented. In 2018, only 6% of visitors identified as Black, according to the report, a slight decline from the previous year. Twice as many black and Hispanic Americans said they don't know what to do in national parks in comparison to white Americans. When asked if they share the same interests as people who visit national parks, 34% of Black respondents and 27% of Hispanics said no, compared with only 11% of whites. Advocates for diversifying the outdoors say stereotypes around who enjoys camping and hiking create a big barrier: what they wear, what gear they have and even when they do it. Further, marketing campaigns promote outdoor activities as a way to relieve stress - yet minorities often feel unsafe or unwelcome in the parks, which increases stress levels.





COLLECTIVE VISION/PARTNERSHIPS

When discussing how to move master plans and projects forward, stakeholders discussed the need for a collective vision. Some felt that disparate groups and organizations were fragmented, and therefore there was not one collective, mutually agreed-upon vision for the city's future. For example, they discussed the vision trips that were taken by many of the stakeholders to tour cities and towns that have similar dynamics to Billings. After the trips, the conversations amongst the group were inspiring - but then, stakeholders felt there was no follow-up to the ideas that arose from those trips.

Several participants mentioned the idea of establishing a Vision Committee, incorporating representatives from a wide range of interests to include Downtown Billings Alliance, Chamber of Commerce, Big Sky Economic Development, Billings Partnership Board, Billings Cultural Partners Board, Billings Leadership Foundation, CLDI, etc. They also felt that industry leaders in banking, agriculture and healthcare needed to be included as well as those in the healthcare industry. Given that they have similar interests in needing to recruit workforce and students, they all have a mutual goal of improving the quality of life in Billings. It was noted that many years ago, as Billings was evolving, industry took the lead in shaping the direction of the city. The objective of the committee would be to identify key opportunities and then prioritize how to accomplish them. That would then be shared with City Council. Most importantly, they felt that this committee should include ambassadors for the city who are prominent and integrated into the local community.

"We need the right people at the table."

"We need a charismatic personality to advocate for and move projects forward."

"We need to work together to do big things. And we need to speak with one voice."

"There is a fractured power block that makes it super competitive for a limited pool of resources. And there's no private business coalition that holds people accountable. In Billings' history, that coalition was hospitals, banks, and agriculture."

"There are elected officials who have a personal preference for no progress. To move forward, a lot of voices need to come together – and there needs to be an assurance that there will be no reputational damage to individuals making the case. We need to bring the business leaders together."



AIR SERVICES

While Billings remains the state's largest city, its Billings Logan International Airport was just the fourth-busiest Montana airport in terms of passenger arrivals recorded in 2022, behind the Missoula Airport and Glacier Park International Airport in Kalispell. Bozeman is ranked as number 1. Both Kalispell and Missoula did, however, see greater seasonal variation than Billings, drawing much of their traffic during the summer tourism season. During interviews, stakeholders expressed frustration with what they view as high prices and limited availability of flights at BIL. It is important to note that leadership at the airport approved a five-year contract with Mead and Hunt, which is an air-service development group that will work with BIL and the airlines to encourage airline expansion.

Billings Logan International Airport recently completed a \$50+ million renovation and expansion to better serve passengers, carriers, and to offer a quality arrival and departure experience. "For air-service development, the biggest thing we can do is communicate with the airlines the benefits of working with our airport and our community to encourage additional air service," Roach said. "We have a lot going on for us in Billings with the new infrastructure that's coming. With our location and with all of the benefits of being the largest city in Montana," said the airport's new Director of Aviation and Transit, Jeff Roach. In cities around the country, DMOs often partner with the airport to help market the airport through their paid, owned and earned channels while also promoting direct flights to the destination in cities where they are available.

Visit Billings is currently in the midst of several initiatives to further promote the flight markets, including creating more information on the Visit Billings' website through a Plan Your Trip section. In addition, the DLO provided significant funds to install "Welcome" murals in the new addition of the airport. Further, Visit Billings has continued to seek grants such as the Small Community Air Service Grant that was awarded to begin the 2017 direct American Airlines flight to DFW. Visit Billings and the TBID funded \$300,000 for that grant and committed another \$300,000 plus \$75,000 in additional marketing funds to once again pursue this grant in 2023. Visit Billings will continue to grow these initiatives by leveraging its past successes.



SECURITY CONCERNS

A majority of the stakeholders expressed concerns regarding the perception and reality of crime and homelessness in Downtown Billings. It has been reported that "an estimated one-fifth of all homeless individuals in Montana, including youth, are found in Yellowstone County," according to the Yellowstone County Continuum of Care. Billings also is impacted by the dangerous offshoots of homelessness, including human trafficking. Homelessness and crime are impacting the tourism industry for destinations around the country; the visibility of homelessness are very obvious for visitors and meeting planners. After the 2021 public safety mill levy (PSML) was passed - adding resources to Billings' police department, fire department, and other public safety needs, as well as containing funding for substance abuse which will help to address addiction issues - the Billings Chamber made this one of their 2023 legislative priorities. The chamber recognizes that multiple, complex public safety issues remain and is committed to working with their legislative delegation to support solutions.

Nationwide, DMOs "have become lobbyists, doubling down on partnerships with local agencies, key city officials and nonprofit organizations. They've rallied the support of hotel suppliers, local restaurants and retailers, and successfully enlisted them in the effort to fight the homeless crisis at their front doors," according to Northstar Meetings Group.

For example, in Seattle, the Chief of Police sits in on Visit Seattle's monthly board of directors meetings and receives regular monthly convention updates on which groups are coming to town, which allows the police to plan ahead to increase patrols around the convention center and area hotels. The Police Chief also meets with meeting planners to determine what resources the city can deploy to address any concerns. San Francisco Travel launched Clean.Safe.365, a coalition of local business entities, including the Hotel Council, the Restaurant Association and the Chamber of Commerce, to shine a spotlight on the crisis and lobby for action on a political level. And Explore St. Louis has developed several turnkey programs that make it easy for groups to contribute to local community resources, such as the St. Louis Dream Center, which operates a soup kitchen and food pantry, providing hot meals as well as showers and haircuts to community members in need.



STRATEGIC RECOMMENDATIONS

The four-year strategic plan recommends five core objectives and adds, under each objective, key strategies for achieving those objectives in the coming years. By developing long-term goals and strategies, Visit Billings can remain focused on driving visitor-related economic impact to the city.

VISITOR EXPERIENCE

Drive the short-term and long-term development of the destination, to include product development.

- Vision Advisory Group
- Sports Authority
- Alternative Funding
- Experience Incubator
- Nightlife, Music, Entertainment and Signature Events

COMMUNITY IDENTITY AND PRIDE

Nurture and increase the pride that Billings locals feel for their city and community.

- Destination Placemaking and Alignment
- Community Brand Development
- Advocacy Campaign
- National Travel & Tourism Week Celebration
- International Mountain Bicycling Association (IMBA)

BRAND MARKETING

Generate visitor-related economic impact for Billings.

- Research and Data
- Sports Marketing
- Group Tour and Weddings
- Flight Markets and International Visitation
- Cannabis Tourism Exploration
- Themed Routes

SUSTAINABILITY

Develop a collaborative resilience planning effort.

- Crisis Planning Evolution
- Homelessness and Perceptions of Safety
- Workforce Development

DIVERSITY AND INCLUSION

Foster an inclusive environment for visitors and residents, while respecting our natural resources and cultural sites.

- Native American History and Cultural Center
- Heritage Months and Tribal Collaboration
- Native American Experiences and Local Products
- Diversity in Outdoor Adventures





Given the importance of product development to the sustainability of tourism in Billings, it is important for Visit Billings to continue driving - and at times leading alongside the Chamber - conversations and projects that both align with tourism and improve the quality of life for residents. There are disparate organizations that already focus on specific projects; however, for a cohesive vision to be adopted and executed, it appears there needs to be a more proactive movement toward greater collaboration.

Building product for a tourism destination, like riverfront entertainment or a convention center, can be long-term, with a greater complexity that may make them more difficult to implement. Nonetheless, these efforts can have a significant local impact for tourism. The objective of destination development is to improve the enabling environment for tourism development, increase market demand, and prioritize products based on market demand - while collaborating with the residents to ensure local sentiment is more positive.

The following initiatives outline how that might be structured.

Objectives:

- Drive long-term development for Billings in key areas throughout the city.
- Build advocacy for specific projects that benefit both visitors and residents.
- Build funding mechanisms for tourism product development.



VISION ADVISORY GROUP

The Chamber of Commerce and Visit Billings can create a Vision Advisory Group for the city, which was a recommendation heard repeatedly throughout the stakeholder research. The most important element of this committee would be its make-up - it should encompass leadership from the business community (including the major industries within Billings such as the banking industry, the agriculture industry and the oil industry), the healthcare community, the educational community, and of course the tourism community. It should also have representation from political leadership.

The Vision Advisory Group should be a committee of individuals who have the resources and goodwill of the community, with the power to "make things happen." It is critical to have committee members who have a very strong influence and are highly respected within the residential community, the business community and City Council.

The goal of this committee is to first assess the current product development needs, generate ideas for future improvements, prioritize those, and then determine action-oriented next steps toward research and funding. The committee should also determine its structure. Examples include Colorado Tourism's Destination Development Committee (chrome-extension://efaidnbmnnnibpcajpcglclefindmkaj/https://oedit.colorado.gov/sites/coedit/files/2020-10/destination_development_committee_goals_for_fy_20-21.pdf)

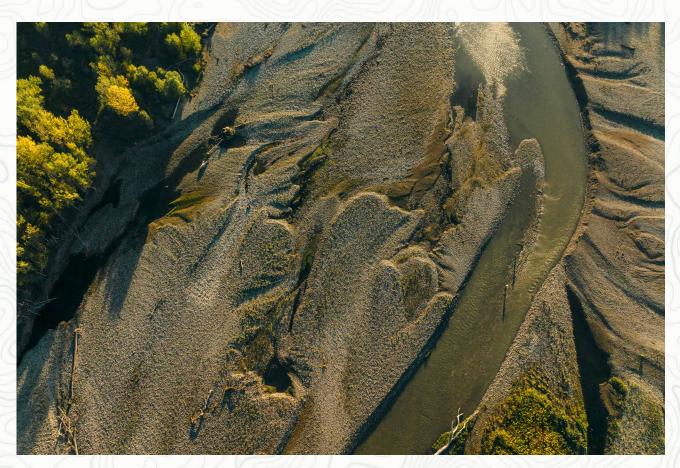
The Vision Advisory Group will need to evaluate all the Master Plans created for Billings that have either moved forward or perhaps have remained relatively stagnant. Those plans include City Council's Community and Neighborhood Plans (www.billingsmt.gov/843/Community-Neighborhood-Plans), Parks & Recreation Master Plans (www.billingsparks.org/resources/plans/), Billings Logan International Airport Master Plan (www.flybillings.com/1412/Master-Plan), etc. From there, the committee should collectively outline which product development initiatives to champion, while also prioritizing the hierarchy for each recommendation.

The Vision Committee also may have suggestions for product improvement that is not in the Master Plans. Or the Master Plans may be outdated (for example, some of the City Council plans on the website date back to 2001 or 1997). If that is the case, subcommittees should put in place a mechanism to conduct research behind a development deemed a priority.

Once the priority is created, the Committee needs to ultimately determine how they can move the project forward. Funding and resident sentiment should be top topics of conversation for each prioritized project. It may mean that sub-committees are developed to research/secure funding or to develop marketing plans to influence resident awareness and approval.

There are specific projects that have a great deal of stakeholder support, but may not have one specific person, group or even an agency tasked with developing and executing a very specific and strategic marketing plan, designed to bring the project to each and every Billings resident to generate advocacy for the project while also creating a mutual understanding of its benefits. These are important projects that could jumpstart larger product development initiatives. These are the types of projects that - if the Vision Advisory Group chooses to champion them - would benefit from a strategic communications and marketing plan.

A key message point in these strategic communications should be how the recommendation will benefit the quality of life for residents while also driving strong economic growth for the City. The communications plan created should incorporate a wide range of avenues and platforms available inclusive of social media, speaking engagements at community organization events (such as Civic Leagues and business meetings), a website so that all activities can be shared in a highly transparent manner, media interviews and more.



BILLINGS SPORTS AUTHORITY

Visit Billings along with the Chamber of Commerce can create a business analysis for the possible creation of a Sports Authority as a department within Visit Billings or as a sub-Board of the BTBID Board. This Authority's sole focus would be on sports promotion, and assisting other entities like the DLO or Parks & Recreation to coordinate their sports event-related services in an effort to make Billings a more sports event-friendly city. This Authority would serve as a source of support for Visit Billings in attracting and booking sporting events, while also helping to further the development of sporting venues.

The business plan can include case studies of active Authorities and Commissions, such as the Greater Columbus Sports Commission in Ohio (www.columbussports.org/). Their sole focus is to: rally Columbus to bid on and win sporting events; work collaboratively to promote the events once they've chosen Columbus; and provide top-tier experiences for the participants that compete here and fans that come to see them. Those case studies can provide insight into different structures that may make sense for Billings. For example, the Greater Columbus Sports Commission operates with its own budget, brand, web and media presence, and fundraising.

Research conducted by San Francisco in researching sports commissions found that three major forms of sports commissions are: an independent nonprofit organization (either 501c3, 501c6 or both); a division of local convention and visitors bureaus; or as a local government agency. Other examples of Sports Commissions include the San Jose Sports Authority (sjsa.org), the Durham Sports Commission (www.durhamncsports.com/about-the-dsc/), the Greater Raleigh Sports Alliance which includes a Sports Advisory group (www.visitraleigh.com/sports-event-planners/) and the Visit Knoxville Sports Commission (www.visitknoxville.com/sports/). That same research conducted by San Francisco found that some of the main sources of revenue used by sports commissions include the following:

- Membership sales
- Individual and corporate donations or sponsorships (cash and/or in-kind services)
- Government and foundation grants
- Local general fund monies
- Local tax on hotel accommodations
- Fees generated from producing and/or managing events (from operating tournaments to hosting an annual awards banquet)
- A combination of these revenue sources.

To answer questions about a Sports Commission, the Sports Events & Tourism Association (Sports ETA) created an informational 101 document, that outlines structure, reasoning, funding, and sales tactics (chrome-extension://efaidnbmnnnibpcajpcglclefindmkaj/https://www.sportscommissions.org/Portals/sportscommissions/Documents/About/Sports%20Commissions%20101.pdf).





ALTERNATIVE FUNDING STREAMS

Given the limits in funding within Billings and Montana (lack of sales tax, etc.) - and with residents wary of any additional bonds - attracting targeted private investment for downtown and city-wide revitalization as well as specific projects is critical. It is noted that several organizations are able to accept private donations and can help drive private investment including the Billings Parks, Recreation and Preservation Foundation as well as Big Sky Economic Development Corporation.

In addition, a Sports Authority can be set up so that it too can accept funding, through private donations, sponsorships, or in-kind and volunteer giving (note Snohomish County Sports Commission: (www.seattlenorthcountry.com/sports/ways-to-give/).

Visit Billings also can consider hiring a firm that specializes in funding. One example is Civitas, a full-service firm specializing in sustainable funding solutions. The company has worked with over 200 destinations worldwide to provide non-profit and legal consulting services, legislative support and help with all things district-related, specifically renewals and formations.

(https://civitasadvisors.com/)

It is recommended that Visit Billings (or the Sports Authority) collaborate with the other foundations to determine how the organization's resources could help to proactively approach private investors for either donations or sponsorships. Those could be large-scale corporations that are interested in sponsorship naming rights and who have a mutual interest in the growth of Billings. For example, Visit Billings could approach large corporations to secure brand partnerships, while at the same time be providing a Sponsorship Packet with tiered sponsorship opportunities for the Sports Complex or Coulson Park (such as that which Victus Advisors is developing). These funding opportunities (such as donations and sponsorships) first need to be developed and highlighted within marketing materials, so that when these relationships are built, the information is easily accessible.

For lower-tier funding needed outside of product development, merchandise sales are an option. Visit Billings can capitalize on its *Outsiders* campaign, by offering visitors branded merchandise using sales platforms like Shopify. Examples of DMMO sales include The VA Store (https://www.thevastore.com/home.cfm) or The Music City Shop (https://themusiccityshop.com/).



EXPERIENCE INCUBATOR

Visit Billings can partner with Rock31 and The Hospitality Management program at Montana State University to develop a program specifically designed as an incubator and network for Billings' visitor experience startups. This new program would be designed to foster entrepreneurs working in the tourism industry, particularly in at-need areas. For example, outdoor outfitters; water adventure outfitters focused on experiencing the Yellowstone River; farm-to-table experiences; nightlife venues; upscale boutique hotels; ziplining adventures; walking arts and culinary tours; guest ranches; wineries using innovative methods (such as Yellowstone Cellars & Winery); dog-sledding; late-night eats, etc.

The goal is to co-create unique and inventive new experiences for Billings' visitors. By fostering new businesses, the incubator also should be designed to create new jobs for the industry and the community.

This also could lead to stronger alignment between Visit Billings and Big Sky Economic Development, whose Strategic Priorities are very similar to many of the priorities outlined within this plan. Those include building infrastructure for entrepreneurship; redeveloping Downtown to build essential workforce housing and connect the medical corridor; parks and trails development; as well as growing the workforce. Many of their strategies involve public awareness and developing a marketing/outreach strategy - much of which Visit Billings could contribute additional resources and expertise in the future.



NIGHTLIFE, MUSIC, ENTERTAINMENT AND SIGNATURE EVENTS

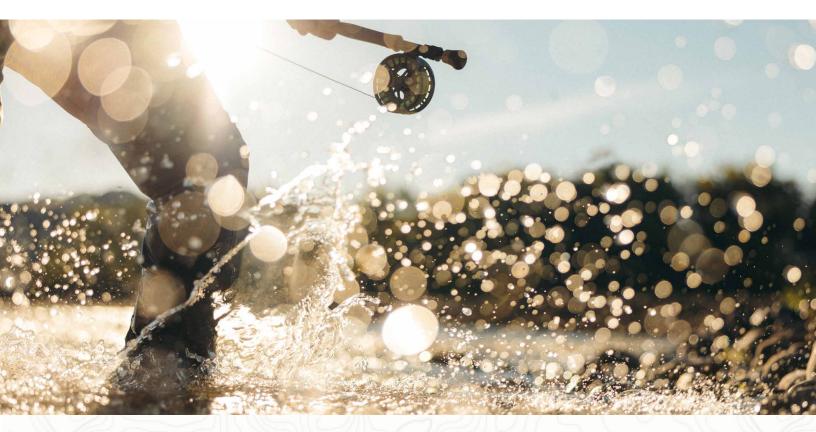
Visit Billings can encourage the advancement of nightlife, music and entertainment to deliver evening activities that align with its cultural and outdoor activities. Downtown Billings generally shuts down early, which stakeholders have pointed out is difficult for meetings, conventions and leisure visitors (for example, when someone is in town for a show and then wants to grab a nightcap). Even the Downtown Billings Alliance only mentions two venues for nightlife (Daisy Dukes Saloon and The Loft Dance Club) and VisitBillings.com doesn't showcase nightlife or music venues on the site.

Visit Billings should work with the downtown association, political leadership, city-wide restaurants, bars, clubs, music, arts and entertainment venue owners/operators, and other interested stakeholders to create a Nightlife Strategy for Billings. The strategy should deliver a balanced plan for enhancing nightlife experiences, while maintaining a high quality of life for residents.

The Nightlife Strategy can help create a seamless flow of social experiences in public and private spaces - from sidewalk cafes to live entertainment in restaurants, bars and clubs - while devising a plan to support the venues, nurture local artists, musicians and performers, as well as provide opportunities for local entrepreneurs. The Strategy could create hospitality zones throughout the city while planning out resources, infrastructure, community standards, and management of sound, litter and waste, and safe transportation options. Communication with police and fire marshals would also be key to ensuring a growth in nightlife stays safe. Leveraging the expertise of music venue operators like The Pub Station would be beneficial to developing a Nightlife Strategy that ultimately builds upon the vibrancy of Billings' neighborhoods.

• Signature Events in the Need Period: Visit Billings also should work with existing events and festivals to help deliver high-quality experiences during need periods (particularly in the shoulder seasons). A signature event or festival should leverage Billings' strengths in outdoor and Big Sky adventures, as well as beer and Montana food specialties. Examples in similar climates include: Anchorage Alaska's Fur Rendezvous with multiple sled-dog races; Steamboat Winter Carnival in Steamboat Springs, CO with horse-and-ski races and other rodeo-inspired activities; Portland Oregon Winter Light Festival; St. Paul Minnesota Winter Carnival; the International Snow Sculpture Championships in Breckenridge, Colorado; and Wintersköl in Aspen, CO - a 4-day festival celebrating Nordic culture, with highlights including a dog fashion show, WinterSculpt, WinterFest, and a grand-finale fireworks display. Current event organizers along with key tourism stakeholders would be encouraged to actively participate in a signature event(s) initiative to contribute insight, experience and expertise to the analysis, strategy, planning, funding and implementation.





What's good for the community of Billings is good for tourism. Effective communication with local residents about tourism, its contributions, and how it affects their community is important. The locals of Billings should be the greatest advocates for the destination, and so many residents already share an incredible pride for their hometown. Yet there is a need to give Billings a shared identity that inspires them to rally around the Billings brand and advocate for the destination both internally and with potential and current visitors.

Objectives:

- Evolve the community identity for Billings, to create a brand that is more widely adopted and celebrated by locals.
- Educate and inform the local community on the initiatives that will help grow the visitor economy
 and its economic impact in Billings, as well as continue building advocacy for the tourism
 industry and its stakeholders.
- Foster and develop programs that will further increase Billings' pride in its community, that locals want to actively share with visitors.



DESTINATION PLACEMAKING AND ALIGNMENT

"Every destination is made up of interconnected networks and complex systems. A visitor will encounter and patronize many of those, spanning a range of industry stakeholders, community organizations and events, small businesses, and all of the infrastructure that connects a destination. The leisure or business traveler isn't generally aware of how he or she is navigating so many of these interrelated elements that make up a destination, but all of them impact and influence the visitor in some way. Therefore, how well government, community and industry leaders work together influences how well visitors will experience the destination. It impacts where visitors travel in the region and for how long, when they go and why, how much they spend, what types of businesses they patronize, and what they share on social media, etc. It impacts why they even show up in the first place." - DestinationNext

For many years, Billings has been in the process of placemaking, through both strategic and organic means. Placemaking has been defined as "an approach to planning, designing, building and maintaining public spaces in a way that focuses around the people that use and benefit from the space." The approach focuses on not just the physical identity of place, but also the cultural and social identity. Defining a place's cultural and social identity leads to community pride and a sense of belonging. As Billings has evolved, the neighborhoods and districts each have shaped themselves to be distinct and have their own unique point of differentiation. The Heights, Downtown, the West End, and Central Midtown all have their own culture. As Visit Billings drives visitation to each of these neighborhoods, let's give travelers a better understanding of what the locals already know - let's give them a sense of place.

Placemaking has been shown to give destinations a competitive edge in attracting visitors, locals and businesses as it allows one to emotionally connect which then captures their attention and inspires them to want to visit once again. The stronger and more vibrant neighborhoods and districts encourage people to want to invest in that community.

Billings has grown tremendously, and because of the nature of its hotel locations, shopping districts, outdoor adventures, attractions, breweries, and meeting spaces, visitors are encouraged to travel to each of these neighborhoods during their stay. Yet they may not recognize where they are - only that GPS led them to that location. Let's give them a better sense of each district and neighborhood through a defined, strategic approach. This can be done through a variety of ways, including physical wayfinding signage and markers, local business promotion, and visual identity. Think of other urban destinations that have branded its neighborhoods - Dinkytown in Minneapolis, Soulard in St. Louis, Soho, Tribeca, Georgetown, the French Quarter, RiNo in Denver - and how each of them captures the imagination of the traveler. Through creative visuals and messaging - on the streets of Billings and through Visit Billings' digital/print promotions - the Billings neighborhoods also can be branded to give them an even greater sense of place. And when government, community and industry leaders work together to deliver that brand, Billings' placemaking will be even stronger.





COMMUNITY BRAND DEVELOPMENT

It is recommended that the city begin the planning phase to undergo a future branding process, with the goal of developing a brand that is more widely adopted from the tourism and business community as well as political leadership. Stakeholder research identified a common theme that Billings' stakeholders and residents don't feel that Billings has an "identity." Further, they are concerned that "Montana's Trailhead" doesn't showcase the city's attributes, but instead just its location (and, more concerning, that it encourages visitors to explore outside the city.)

A brand development would collaborate with stakeholders throughout the process, so their voices are heard, with the final deliverable being a community brand that is authentic to the destination. This doesn't necessarily mean that "Montana's Trailhead" would no longer be used, but there is the possibility that it could become sub-messaging rather than the city's brand and tagline.

Meanwhile, Visit Billings new *Outsiders* campaign already leverages that Billings, Montana spirit that could eventually evolve into a larger community identity. The spirit of the campaign was found in the campaign anthem:

We are here for anyone who loves being outside.

Yes, outside as in outdoors outside - but also outside the norm. People who won't conform or bend to change for change's sake. People who go against the grain.

Pragmatic, thorough, strong-willed, practical, and even stubborn at times. That's what it takes to be a Montanan. To be someone who stays true to their roots. That is what makes Montana great.

In Montana, there's an undying belief that life should be lived as we see fit.

We are the world's biggest fan of being outside. We are fans of people.

And to us, the best people in the world are outsiders. Welcome to Billings.

In future initiatives, the Chamber could adopt parts of this language and visuals, to align with Visit Billings' campaign.



ADVOCACY CAMPAIGN

Advocacy is critical to the growth and development of Billings as a destination of choice. It is more essential than ever for Visit Billings to develop an emotional and value-based campaign that delivers tourism "return on investment" messaging, showcasing how tourism benefits the quality of life for Billings' residents. This campaign messaging should integrate an understanding of how Visit Billings directly supports the people of the community with new opportunities for jobs, economic development and public services.

It is noted that each year, the Institute for Tourism and Recreation Research at the University of Montana distributes a report that is a summary of Montana residents' attitudes towards tourism within the state. Since 1992, ITRR has asked residents questions specific to their attitudes towards tourism during the 4th quarter of each year (October, November, December) as a way of tracking the current trends and perceptions towards the industry.

In "Montana Residents: Attitudes Towards Tourism 2022 & Resident Perceptions of Community Disaster Preparedness," for the second year in a row, results from this survey indicate residents demonstrate a balanced attitude and understanding of the tourism industry within the state. However, in the most recent survey from 2022, 50% of respondents agreed that the state is becoming overcrowded because of more tourists. While this is an 11% decrease in agreement from 2021, Southeast Montana was the most likely to agree. The survey also asked residents if they felt that the quality of life for Montana residents would improve if tourism were to increase in the state. Under 40% of respondents (35%) were in agreement with this statement. When analyzing results by travel region, results from 2022 mark a change from 2021. Travel regions like Southeast Montana, Missouri River Country, and Central Montana (regions that were the most likely to agree with the statement) are now the most likely to disagree with it. For all three travel regions, their level of agreement fell by at least 15% from the previous year. Residents were given a chance to share any thoughts they had concerning the survey topic and the questions presented to them. Of those who provided some additional comment, the predominant sentiment was that tourism itself was not the issue, but instead people moving to Montana (which echoes similar responses from recent years). Another common response from residents was that they felt the state and their local communities needed more and/or improved infrastructure to accommodate both tourists and residents.

Visit Billings can initiate an integrated plan - annually and in collaboration with the Billings Chamber of Commerce - that leverages owned and earned channels (through social media, website communications and PR initiatives) designed to create a greater understanding for tourism and its cultural and economic benefits. The plan should evolve each year as new developments, projects and events emerge. Collateral could be developed to help refine messaging and expand awareness.



NATIONAL TRAVEL & TOURISM WEEK CELEBRATION

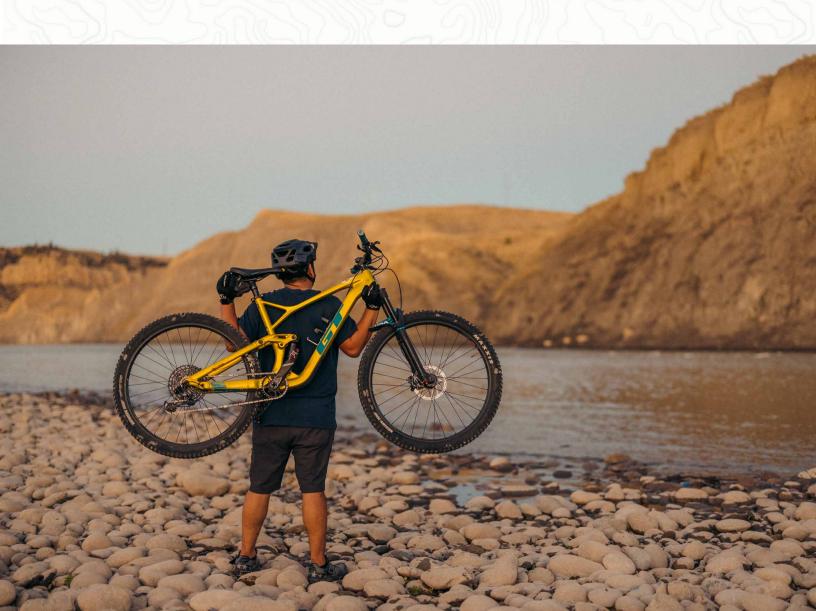
Established in 1983, National Travel & Tourism Week is an annual tradition when the U.S. Travel Association and the entire tourism industry nationwide come together to celebrate the power of travel as an economic driver for the U.S. economy. Year 2023 marked the 40th anniversary where DMOs across the country planned events throughout the week to spotlight travel's essential role in stimulating economic growth for their cities, counties and states, cultivated diverse communities, created fresh job opportunities, fostered new businesses, and inspired millions of Americans to travel.

This also is an annual opportunity to showcase to the community the power of travel within the Billings' community. Visit Billings can host a NTTW event celebrating the front-line workers and Billings Trail Guides who each day give our visitors an incredible Montana experience.

NTTW is an opportunity to release annual visitor spending and revenue data, showcasing the economic impact of tourism to the residents. Annually, DMOs around the country leverage the importance of NTTW to create a spotlight on their own local efforts. For example, news releases include headlines such as "Discover Kalispell celebrates tourism in Montana" (https://nbcmontana.com/newsletter-daily/discover-kalispell-celebrates-tourism-in-montana), "Galveston Reports Record Tourism Success in New Economic Impact Study," "Little Rock CVB Celebrates National Travel and Tourism Week," and "2022 Wyoming Tourism Decreased In Numbers But Increased In Spending." Figures like total number of visitors, visitor spend, number of jobs supported by tourism, and tourism revenue are often tracked annually, and those numbers are promoted to the media and through social feeds, using NTTW as a backdrop.

Billings' can align their event with Brand MT and the Montana Chamber of Commerce which hosted 3 days of NTTW events in 2023. Those events included a luncheon at Yellowstone Valley Lodge & Grill nestled in Paradise Valley on the banks of the Yellowstone River, then Sage Lodge for a hands-on filmmaking demonstration with JP Gabriel of Filmlites Montana, and then into Gardiner and Yellowstone National Park to view the newly constructed road between Gardiner and Mammoth Hot Springs. Future planning can include collaboration with the state to bring even greater attention to the tourism industry in Billings and statewide.

- Visit Billings will want to be proactive in having information readily available, so that residents
 understand that the Visit Billings team is a community asset. Destination International's
 Advocacy Toolkit offers both a Community Benefit Funding Model as well as a Workbook to
 assist in these efforts. These types of toolkits make it easy to distribute information to media,
 but also to political leadership and during speaking engagements at events like civic leagues and
 neighborhood gatherings.
- This also is an ideal moment to increase awareness for Visit Billings' funded community programs, showcasing how the tourism industry is contributing to the city's quality of life.





IMBA

The International Mountain Bicycling Association (IMBA) is the worldwide leader in mountain bike advocacy, and the only organization in the U.S. focused entirely on trails and access, for all types of mountain bikers in all parts of the country. Since 1988, they have taught and encouraged low-impact riding, grassroots advocacy, sustainable trail design, innovative land management practices and cooperation among trail user groups. IMBA U.S. is a national network of local groups, individual riders and passionate volunteers working together for the benefit of the entire community.

The IMBA Model Trails Program recognizes outstanding, destination-worthy mountain bike trail systems as Ride Centers™ and iconic, adventurous, backcountry trails as IMBA EPICS. IMBA describes them as "the trails worth traveling to, the best places to introduce someone to the sport we all love, and are the facilities builders and advocates should look to for inspiration."

The Ride Center™ designation represents IMBA's recognition of large-scale mountain bike facilities that offer something for every rider - from backcountry adventures to shuttle-served gravity trails, and from expert-only to family-friendly. The Gold, Silver and Bronze Ride Centers are promoted nationally and internationally through IMBA's websites, partners, and all of its distributions. The only city in Montana that is currently recognized by IMBA as a Ride Center is Helena, MT where the 130 miles of trails were awarded Bronze in 2013 and then Silver in 2015. (https://ride.imba.com/node/2169). The only trail designated as an EPIC is Bangtail Divide in Bozeman.

Billings could partner with Billings TrailNet to begin conversations with IMBA to apply for IMBA's trails certification, to be more widely recognized for the city's mountain biking offerings. Ride Centers applications are accepted annually and are then fully vetted by trail professionals.

An example of one DMO who has leveraged its IMBA Silver-Level Ride Center® designation is Virginia's Blue Ridge, which branded itself as America's East Coast Mountain Biking Capital. The Roanoke Valley was named one of the 10 most bike-friendly areas in the United States by *USA Today Travel* and the area's mountain biking has been featured by media outlets such as Pinkbike, Singletracks, *Men's Journal*, and Mpora. (https://www.visitroanokeva.com/biking/mountain-biking/)

As this segment grows, Visit Billings can package all the outdoor adventure offerings in and around Billings in a niche sub-campaign, to create a much greater awareness for all that Billings has to offer year-round. This sub-campaign can leverage the current Billings' *Outsiders* campaign.





The Billings brand is critical to driving visitation and increasing revenue derived by tourism for the city of Billings, which ultimately benefits the resident quality of life. Our branding and marketing plans must continue to evolve to ensure we are differentiating Billings from its competitive set in each of the areas in which Visit Billings promotes the destination - leisure, sports tourism, as well as meetings, conventions and group tour. To do this, we must develop evolved and effective marketing plans that are data-driven based on a deep understanding of current visitors and future travel trends.

Objectives:

- Further increase visitation during the shoulder season and mid-week, to continue creating a year-round sustainable tourism industry.
- Increase visitor expenditure and economic impact of tourism.
- Increase awareness for Billings as a competitive sports destination.

RESEARCH AND DATA

To better understand who is currently visiting Billings, a visitor profile study is recommended which would provide a needed update to the Destination Analysts study from 2018. This study would allow Visit Billings to refine target markets and visitor profile data, focusing on the higher-spending, longer-stay visitor in the most cost-effective markets to increase the lifetime value of the visitor. We suggest looking into Visitor Persona research and/or an Audience Segmentation study.

- Segmentation is the study of consumers' responses to specific attitudinal, behavioral,
 psychographic, and category- and brand-related questions. During analysis, consumers with similar
 attitudes and thought processes are bundled together to create an audience "segment." This
 determines which consumer segments exist and reveal the relative size of each, while evaluating
 the potential economic value of each segment. The study also focuses on identifying the behaviors,
 attitudes, needs, and underlying psychographics of each segment and how these differ from one
 another.
- Personas are tools for understanding and empathizing with consumers, clients, or end users. They
 present a complex marketplace as a series of archetypes with names, faces, and perceptions,
 offering a shared foundation for teams in all parts of your organization to comprehend what your
 customer wants and needs. This allows us to align on strategic goals based on consumer needs,
 while also visualizing, understanding, and empathizing with the consumer.

Visit Billings has consistently invested in data and research tools to determine the effectiveness and ROI of each marketing campaign. While the media agencies provide dashboards to track media attribution (for platforms where that is possible), it is incumbent on the DMO to invest in platforms that provide data on revenue, visitor travel behaviors, travel motivations, visitor spend, etc. to optimize Visit Billings' advertising strategy with custom audiences. It is recommended that Visit Billings set a process in place to review the platforms available annually, to determine if the current platforms being used provide the most valuable intelligence, while defining gaps and future needs.





SPORTS MARKETING

Sports tourism is a critical revenue stream for Visit Billings. While the DLO has consistently maintained a proactive approach with sports planners, the hire of a Sports Tourism Manager will further build awareness for Billings as a premier sports destination.

Sports ETA, the only trade association for the sports events and tourism industry, released its annual *State of the Industry Report* for 2021 resulting in the sports tourism sector's direct spending impact of \$39.7 billion which generated a total economic impact of \$91.8 billion, supporting 635,000 full-time and part-time jobs and generating \$12.9 billion in taxes. Consequently, the sports tourism market is recognized as the fastest-growing segment within the travel industry.

The sector rebounded quickly in 2021 increasing 82% year-over-year. The 175 million sports travelers in 2021 was only 2.6% lower than the high-water mark established in 2019. Sports travelers, event organizers, and venues spent \$9.7 billion on transportation, \$8.4 billion on lodging, and \$7.5 billion on food and beverages. Recreation, retail, and tournament operations rounded out spending, registering \$5.3 billion, \$5.0 billion, and \$3.7 billion, respectively. The lodging sector accounted for 21% of all sports-related travel spending. In 2021, sports-related travel generated 66.5 million room nights.

Already, Visit Billings supports and leverages major sporting and special events that generate significant room nights (for example, NCAA DII Cross Country Western Regional Championships, the NAIA Women's Basketball National Championship Tournament, and so many others) to drive future visitation. Visit Billings assists events in helping to grow visitation, in the form of incentives, financial support, and grants.

Visit Billings also markets with *Sports Destinations* magazine and sports directories. In addition, the DLO is a member of and attends SportsETA events and will eventually return to TEAMs. Leads are originated from Huddle, and Visit Billings contracts with IMM for sales leads and follow-up through e-communications. The new Sports Manager is also becoming certified as a Sports Tourism Strategist (STS) through SportsETA.

There are two areas which could be expanded upon - the evolution of the Sports section of the Visit Billings website, as well as an expanded PR and advertising campaign with its own dedicated budget.

Sales Tools and Website

- Build a templated toolkit to help Sports Planners promote their events in Billings. The toolkit could include:
 - Multi-day, comprehensive itineraries targeted to family and sports planners.
 - Custom social media filters that celebrate the tournament and Billings.
 - Partnerships with local attractions to bundle day-passes with their room nights to entice longer stays. Sports travelers are looking for destinations that offer an extra day or two of activities and novel experiences.
 - A one-sheeter showcasing the most Instagrammable photo locations in the city.
- Feature videos or a podcast on the site that build a community for the sports planners and the Visit Billings team. For example, The Greater Columbus Sports Commission created a Virtual Sports Report to give their audience a chance to hear from and connect with sports leaders, both within the community and nationwide, on the latest sports industry news. They've also created an entire "Fan Experience" section of their website complete with an Arena District Gameday Guide to provide helpful links to make the most of fans' experience watching sports in Columbus.
- Virtual tours of the new facility when the sports facility is approved, create a huge splash by hosting a virtual tour of the facility on the website.
- Sports tourism video(s): Create a sales video that incorporates sales teams, satisfied clients and the range of venues and amenities available for sports teams. Incorporate scenes of Billings that highlight the city itself and how it is ideal for families and teams.







Marketing Campaign

- Branding: Create a brand campaign specific to sports that leverages the more holistic Billings brand campaign, but speaks directly to the sports organizers.
- Paid Media: Media outlets such as SportsTravel and Sports Destinations Management effectively reach the sports event planner through paid media campaigns. They also will work with DMOs to customize media buys. For example, native advertising is sometimes the most engaging, as DMOs are able to build content/copy/editorial based on the needs of sports organizers and how Billings can uniquely meet those needs. SportsTravel offers a variety of products including a weekly e-newsletter, a podcast series, a Winners & Losers column, a Destination of the Month series and social media lead generation and more. Sports Destinations Management, in addition to print ads, offers custom written articles for advertisers such as Destination Spotlight a 2-page narrative showcasing facilities, amenities, and local attractions. SportsDestinations.com offers Audience Extension, a proprietary technology for retargeting digital audiences. When a digital ad is purchased, advertisers can add retargeting audiences after they leave the website and are browsing online.
- PR FAM Tour: There are several organizations that are critical to sports marketing, such as Anthony Travel, which specializes in creative and comprehensive travel solutions for athletes, teams, coaches, parents, universities and fans. Visit Billings can host a FAM (familiarization tour) customized to specifically meet the needs of meeting planners while showcasing the city as the premier location for sporting events and groups. Journalists from media outlets specific to sports also can be invited to join.
- PR Plan for Sports: Sports publications are looking for DMO representatives who are willing to be quoted for articles, as well as new and updated content from destinations. Each of the sports publications also hosts an editorial calendar, giving a good sense of what they each cover. The PR team can regularly pitch journalists to send them updates that speak on what's new in Billings. When large tournaments are in Billings, capture photography, video and team interviews to later pitch to sports event media. In addition, if the teams are arriving from major media markets, pitch the local newspapers/broadcast and give them the same content.



GROUP TOUR AND WEDDINGS

The market size of the Tour Operators industry in the U.S. in 2022, measured by revenue, was \$8.6 billion in 2022. In addition, the global destination wedding market is forecast to increase significantly by 2031. While the destination wedding market size was estimated at around \$21.6 billion in 2021, this market is set to grow to almost \$291 billion in 2031. Because these two markets are so important to hotel occupancy in a destination, DMOs often create specific market campaigns for these segments.

- Website: Create sections on the site specifically speaking to these audiences with resources
 dedicated to their needs. Group Tour often speaks to bus tours, student groups and family
 reunions. Resources can include a Group Tour Planner, multi-generational itineraries, and
 customizable programs. The site also can feature blog posts that offer group planner tips and
 information, such as "Unique Experiences for Groups" and "5 Reasons Why Planners Love
 Billings." A Weddings section can include images and stories from couples that would inspire any
 bride to want to book her big event in Billings.
- Advertising: There are a number of digital outlets and publications that specifically cater to both group tour and weddings, that can often create custom packages and added value opportunities. Those include The Group Travel Leader, Group Tour Magazine, The Knot, Montana Bride, and more. The digital opportunities allow Visit Billings to be top of mind for brides and group tour planners.

FLIGHT MARKETS AND INTERNATIONAL VISITATION

Visit Billings should continue to partner and work closely with the leadership at Billings Logan International Airport to align marketing plans and campaigns with updated news on direct flights, as well as airlines and routes the leadership is lobbying for. Destinations often create unique marketing campaigns to promote a flight. For example, Charleston, South Carolina recently won a new British Airways flight aboard the Boeing 787 Dreamliner to London Heathrow. The local CVB played a large role in lobbying for the flight and to promote itself as an attractive tourism destination for Europeans. This type of promotion can support the grant process that Visit Billings currently conducts with the airport leadership.

- BIL Data and Marketing Aligned: In addition to pulling the statistics available on Billings Logan International Airport's website that compiles and reports statistics on enplanements and deplanements (https://www.flybillings.com/651/Statistics), work with the airport to ensure the advertising campaign planning in the flight markets is proactive. Airport officials can provide information on aviation development and the route development calendar to see what's coming up in six months, so that the marketing campaigns for Billings can align. If specific routes are in trouble, if there is a weakness in the market in midweek flights, or when new new routes and new airline launches are announced, the marketing campaign can effectively include that messaging in the creative and ensure paid efforts are targeting the right audiences.
- Website and Marketing: Through the website and the marketing campaign, we want to create
 greater awareness for the airport itself and the direct flight markets on Visit Billings owned, earned
 and paid channels to include the website, social channels and to integrate it within the paid media
 campaigns. Currently, the paid media campaigns target the flight markets, but often don't directly
 promote the direct flights. This may be another layer of creative, to include this messaging in the
 flight market promotions.
- Brand USA: To help further promote international visitation, leverage Brand USA's co-op marketing program, which delivers an array of options to increase awareness, visitation and spend. Brand USA offers programs by category and market in the areas of activations, content and distribution, consumer media and trade focus. Visit Billings can further work with Brand USA and their international representatives as well as tour and receptive operators to support trade initiatives including: trade shows, sales missions, training initiatives, and MegaFams. Brand USA also hosts videos and podcasts through GoUSA TV.



CANNABIS TOURISM

Recreational cannabis is now legal in Canada and 23 U.S. states and the District of Columbia. While Montana legalized recreational adult marijuana use, none of the surrounding states have. Montana is beginning to receive media coverage not just as a "place where cannabis is legal" but a place to plan a cannabis-cation. States across the country are in various stages of exploring cannabis tourism. And according to *Forbes*, a 2020 report found that 29% of all active leisure travelers (and 18% of all Americans) want to do cannabis-related activities on vacation. "This interest in cannabis tourism is not theoretical; 25% of respondents traveled to a destination for a cannabis experience, including 44% of Millennials and members of Generation Z," the magazine stated.

As perceptions and regulations evolve, Visit Billings can stay ahead of the conversation by working with these cannabis entrepreneurs to assist them in how we speak about Billings as a destination for unique cannabis and vacation experiences. As Billings determines whether cannabis tourism is an avenue to pursue, based on local sentiment, Visit Billings can research other ways in which to partner with tourism stakeholders to research and create more experiences, such as dispensary tours, touring a farm or cultivation site, spa treatments with CBD products, or dining at an infused restaurant. To successfully drive cannabis tourism, a destination needs more than just dispensaries. Cannabis dining, industry specific events, and product that is uniquely Montanan are experiences that can drive tourism. Cannabis experiences are often developed alongside arts and culture, dining, and health and wellness events and attractions.

THEMED ROUTES

Billings offers so much for visitors including the Yellowstone River, outdoor adventures like rock climbing and horseback riding, history and heritage sites, a variety of culinary choices with a growing James Beard scene, art galleries and venues, and miles of hiking, biking and walking trails. The city has beautifully promoted the Brew Trail, which could be leveraged to introduce additional thematic routes such as an Arts & Coffee Trail, the Heritage Trail, or the Outdoor Adventure Challenge. Each would help visitors understand how to consume an experientially diverse region such as this based on their particular interests. Visit Billings can work with stakeholders to identify, create, package, market and promote a series of thematic routes that promote key points and areas of interest, while leveraging the work already done through the Great American Road Trip site.







Tourism can be unpredictable when factors outside of our control - such as the pandemic or flooding in Yellowstone - affect visitation. Often the circumstances require flexibility and the ability to evolve marketing campaigns very quickly. However, to the degree possible, Visit Billings wants to plan for crisis situations and provide a stabilizing influence to ensure that the destination can meet the current and future needs and expectations of the visitor. To do so, Visit Billings will want to further its current collaborative resilience planning efforts.

Objectives:

• Mitigate concerns for both leisure travelers and meeting planner/attendees, by leveraging learnings from recent events and incorporating them into future initiatives.





CRISIS PLANNING EVOLUTION

Evolve the crisis marketing and communications plan to take into account learnings from previous crises including the Yellowstone flooding, an abrupt halt to tourism like the pandemic, or situations that involve immediate communications and collaboration with local tribes. The plan should include tactical recommendations such as immediate updates to the website or social channels if warranted; contact information for influential stakeholders, the state tourism office, political or tribal leadership; and a step-by-step plan for how to react with each situation that may arise.

HEALTH & SAFETY

As the landscape shifts with any new health scares affecting travel, we will continue to want to stay vigilant on any new health and safety protocols as well as behavioral expectations and ensure we are effectively communicating that to visitors. In addition, Visit Billings will want to work with stakeholders to ensure they have the collateral and marketing tools they need to align with Visit Billings' messaging.

HOMELESSNESS AND PERCEPTIONS OF SAFETY

To better understand the perceptions of visitors and meeting planners, Visit Billings can conduct a research study to gauge the true level of how safe visitors feel in Billings, along with a better understanding of the complexities of the issue. Using that study, Visit Billings can determine the messaging and information that is needed (if any) to convey to both leisure and business/meeting travelers. Visit Billings already has a strong collaboration with police leadership, to ensure that visitor and meeting planner concerns are addressed regularly. As Visit Billings books increased sporting events - where entire families are visiting Billings - a more structured process can be developed so that meeting planners can be assured of their attendees' safety, and the Billings police force has the opportunity to prepare for large-scale meetings and conventions. To stay competitive in the M&C space and to help the city find solutions, Visit Billings can develop a program that allows for meeting-goers to directly support those in need.

M&C / Sports Events Give-Back Programs: There are three prominent ways for a DMO to structure
a way for large-scale event attendees to give back while on-site. Those include developing off-site
volunteer excursions like clean-up programs, an in-house project such as attendees assembling
bicycles that are donated to local in-need children; or a simple call for donations to local charities
in need. Visit Billings can develop a give-back program that benefits those organizations that are
most in need, while aligning with organizations that meet the needs of meeting planners.

WORKFORCE DEVELOPMENT

Billings' tourism stakeholders have consistently shared a common concern of not being able to attract a workforce large enough to meet their current needs, for a variety of reasons including affordable housing. Already, organizations within Billings including You Belong in Billings, BillingsWorks, and Better Off in Billings - as well as the Northern Hotel's partnership to develop hospitality careers - are focused on the needs of workforce development. While Visit Billings may not take the lead in this issue, the success of these programs will have a direct impact on visitation and the perceptions meetings and sports planners as well as leisure visitors have about the city. Therefore, it is critical for Visit Billings to have a strong pulse on the success of these programs.

In addition to continuously supporting the efforts of organizations like Downtown Billings Alliance and Big Sky Economic Development, Visit Billings can determine if it is appropriate to research programs such as the one Destinations International provides. One example is the apprenticeship program DI developed in partnership with SearchWide Global and the International Association of Venue Managers, a 600-hour apprenticeship program that provides apprentices with hands-on professional work experience with participating destination organizations and selected destination partners. In addition, Visit Billings can explore the idea of creating an independent 501(c)(3) nonprofit foundation to support issues such as workforce development through scholarships or grants to tourism programs









Nationwide, diversity has always been intrinsically tied to tourism. As Destinations International states, "We travel to meet new people, have new experiences, and expand our worldview beyond our lived experiences." Visit Billings already has committed to diversity and inclusion, and has made great strides in areas such as becoming a Certified Autism Destination. Promoting an even more diverse experience for visitors would inspire travelers to view Billings and Southeast Montana as a must-see part of their Montana itineraries.

Objectives:

- Promote development of more diverse cultural experiences in Billings.
- Build greater collaboration with Native American leadership and organizations to foster a more inclusive environment for visitors and residents.





NATIVE AMERICAN HISTORY & CULTURAL CENTER

Through the Chamber of Commerce, create a committee that actively researches the creation of a Native American History & Cultural Center in Billings. If done in collaboration with tribal leadership and the Montana Office of Tourism, this venue could house existing collections currently in storage; provide a venue for regional tribes to engage in storytelling, education, and other creative expression; offer employment opportunities to Native American citizens in Billings; and connect seamlessly with other local attractions with Native American significance like Little Big Horn National Monument, the Rims, and Four Dances. The totality of these experiences could render Billings and environs an essential destination for Native American education and experiences outside of the Smithsonian's National Museum of the American Indian.

The motivation seems to be strong with stakeholders to create such a center, but with multiple organizations focusing on different needs. Visit Billings can take the lead to create an exploratory committee to determine the feasibility of such a facility, as well as explore funding mechanisms. This is the type of experience and attraction that often can garner large-scale corporate donations, for companies that align with the objective to raise the profile for Native American communities.

HERITAGE MONTHS AND TRIBAL COLLABORATION

Create greater awareness for local efforts that celebrate milestone months including Indigenous Peoples' Day (October) and Native American Heritage Month (November). The Visit Billings website could showcase an array of women- and minority-owned businesses, with special landing pages for different heritage months. These spotlights not only showcase different places that leisure travelers can visit, but also provide a platform for business owners to tell their stories. Honor the local tribes by acknowledging the specific contributions they've made toward making Billings what it is today, while also showcasing members of the tribes who live in Billings.

To continue developing experiences that are authentic and respectful of the indigenous population, Visit Billings can create a stronger collaboration with the local tribal communities. There are a number of organizations in Billings that can help facilitate richer conversations and collaborations with tribal leadership. Those include the Native American Achievement Center at Montana State University Billings which recently won a grant to initiate a series of workshops highlighting the unique artwork and culture of the Crow and Northern Cheyenne tribes. Other organizations where Visit Billings can build greater collaborations and partnerships include the Rocky Mountain Tribal Council and the Native American Development Corporation. Efforts can range from monthly meetings to a Visit Billings marketing team tasked with developing these experiences in conjunction with these organizations.

NATIVE AMERICAN EXPERIENCES AND LOCAL PRODUCTS

The Montana Office of Tourism already provides a wide variety of resources showcasing Native American experiences and products that Visit Billings can further promote through their website and marketing campaigns. Those include the Warrior Trail Highway Road Trip through Billings and Southeast Montana, which includes experiences hosted by businesses like Indian Battle Tours and the Apsaalooke Glamping Company where visitors can extend their stay in Crow Agency and spend the night in a luxury teepee. Further, events like Crow Native Days can be promoted through Visit Billings' marketing campaigns. Visit Southeast Montana also offers Visit Billings a wealth of information, which can be further promoted through VisitBillings.com.

Visit Billings also can celebrate and promote the businesses who are certified by the Grown in Montana and Native American Made in Montana programs which build recognition for products that are "authentically Montana." This program can be showcased through Visit Billings' marketing campaigns and owned channels.

DIVERSITY IN OUTDOOR ADVENTURES

Visit Billings can help further the U.S. National Park Service's marketing initiatives to encourage more diverse travelers to visit the parks. For example, Visit Billings can showcase outdoor adventures through film and imagery that highlight African-American visitors as 54% of U.S. Black travelers agree they are more likely to visit a destination if they see Black representation in travel advertising. Visit Billings also can create partnerships and collaborations with organizations like Diversify Outdoors (www. diversifyoutdoors.com), a coalition of digital influencers, affinity groups, and allies promoting diversity in outdoor recreation and conservation. Visit Billings could go one step further by partnering with African American influencers who specialize in outdoor adventure and travel, to create a story or campaign that showcases Billings in a more inclusive way. Those include All Mountain Brothers (11, 000 followers), outdoorsydiva Lauren Gay (37,000 followers), outdoorafro (93,000 followers), she_colorsnature Chelsea Murphy (66,000 followers), coblackpackers (11,000 followers) and so many others.





IMPLEMENTATION

To ensure the Destination Strategic Plan stays top-of-mind, and that the Plan's implementation is integrated into daily activities, it is important that the individual action items become a part of Visit Billings' annual planning process. The goal is for this Plan to be evaluated and measured annually, with KPIs identified so we know if the Plan and its outlined initiatives need to evolve. Further, the Destination Strategic Plan also should be highlighted in the planning and management process of both the Chamber of Commerce and within the City's planning. These individual action items should also guide the industry and its stakeholders in their individual and collective development and management efforts.

In many cases, the action items included in this report can be undertaken by Visit Billings, while others need to be owned and shared with stakeholder partners of local businesses as well as community and/or City organizations. Every person who takes on responsibility for a specific initiative should understand how their engagement and cooperation can serve to enhance Billings as a tourism destination, increase the City's economic impact opportunities, and enhance the quality of life for residents.

The first step in this implementation process will be sharing this report and its action items with Visit Billings' public and private sector tourism stakeholders. This dialogue has already begun, as each of those stakeholders served a crucial role in helping to develop the research and priorities for this Destination Strategic Plan. Of course, Visit Billings will take the lead to implement, direct and manage the action items that have been outlined in this report. As the destination marketing and management organization for the City, it is Visit Billings' responsibility to further each of these recommendations.

In terms of next steps, it is envisioned that the implementation will include, but not be limited to the following:

- Presentation and communication of the Destination Strategic Plan by Visit Billings to City and industry stakeholders
- Engagement with specific stakeholders to discuss and share individual action items
- Development of working groups, including interested stakeholders, to serve as the implementers, champions and supporters of the various recommendations
- Broad discussion amongst working groups of specific tactics to accomplish each action item, as well as the timeline and measurement goals
- Inclusion of the Destination Strategic Plan action items into Visit Billings' annual business and marketing planning process including:
 - Identifying organizational responsibilities as well as the authority for each
 - Identifying activities and work plans for implementation
 - Identifying the resources necessary for implementation
 - Identifying the timeline for implementation
 - Identifying the key performance indicators (KPIs) necessary to monitor and assess performance
 - Prioritize the recommendations for implementation by the stakeholder working groups and Visit Billings leadership
 - Support, manage and monitor implementation initiatives

To coordinate the implementation effort, Visit Billings will again ask the Steering Committee to help in managing and organizing the action plans of each workgroup. If willing, they are on-hand to help determine roles and responsibilities; find and allocate resources; assess KPIs; serve as sounding boards for the workgroups; and help adjust the action plans as needed. This Steering Committee will be chaired by the leadership of Visit Billings and the Billings Chamber of Commerce. The Steering Committee should plan to meet quarterly to manage these responsibilities.



