



Grant Details

118486 - FY23 DMO Plan

122542 - FY23 YELLOWSTONE COUNTRY DMO Plan

DOC Office of Tourism

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DMO Plan Narrative

1. Describe Your Destination

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

Who We Are: The primary function of Yellowstone Country Montana, Inc. (YC, YCMI) is to promote the five-county region (Gallatin, Park, Sweet Grass, Stillwater and Carbon) of Montana as a year-round leisure destination to resident and nonresident visitors, while encouraging respect for our outstanding natural environment and quality of life.

This place we call home is an unparalleled year-round vacation destination, and that's not something we ever take for granted. Yellowstone National Park is a natural wonder of epic proportions and the region beyond the park is every bit as lovely. We're dedicated to sharing our part of paradise and our reverence for wild things and wild places, thriving communities and extraordinary adventures with curious travelers and faithful wanderers.

Who We Wish To Attract: High-value, low-impact travelers who seek an authentic sense of place experience.

Why They Come: The Yellowstone Country Differentiator-- The "Beyond Yellowstone" experience that can be found throughout the YC region; people come to Montana is to visit Yellowstone National Park, then stay, or return time & again because the region offers the opportunity to "get away from your getaway by heading north of the park." Visiting the world's most famous national park is a must for many people, but Yellowstone Country's mission is to broaden the experience to encompass what can be found outside the park in Montana's south-central region.

STRENGTHS

- Yellowstone National Park
- Beartooth All-American Road
- YNP Gateway Communities: Three of the five entrances to YNP are located in YC, including the only year-round entrance at Gardiner, the northeast entrance at Cooke City/Silver Gate and the most-accessed entrance at West Yellowstone.
- Scenic Drives: Picturesque routes will take travelers up to high mountain vistas, along country backroads, or winding through our charming communities.
- Alpine Ski Resorts: Bridger Bowl, Big Sky and Red Lodge Mountain are three of the top ski resorts in the state.
- World-Renowned Snowmobile Areas: Cooke City, West Yellowstone, Gallatin River Corridor
- Nordic Skiing: Montana's Yellowstone Country is a Nordic utopia—West Yellowstone's Rendezvous Ski Trail, Boundary Trail, Riverside Ski Trail and Bozeman's Crosscut Ranch, Big Sky's Lone Mountain Ranch and Red Lodge Nordic Ski Center. Additionally, the five Montana counties that make up Yellowstone Country are crisscrossed by literally thousands of kilometers of skiable terrain, much of it augmented with established Nordic trails. Over-the-snow tours and Nordic skiing in the world's first national park enable visits to areas otherwise inaccessible. And what's better than gliding across a super volcano?
- Culture and History: From Native Americans and dinosaurs to mining, ranching and mountain men, the region offers a unique blend of history and today's modern world. The Lewis and Clark & Bozeman Trails covered areas of the region. Yellowstone Country is a partner in the statewide Montana Dinosaur Trail; Bozeman's Museum of the Rockies is an anchor facility. Tippet Rise is a world-class sculpture and music venue. Many American Indian tribes have homeland ties in the area, with the original Crow Agency site, Madison Buffalo Jump and Headwaters of the Missouri all holding significant cultural and historical value for Indian Country.

- Annual Signature Events: Local festivals & events, farmers markets, fairs, community rodeos, Independence Day celebrations, winter carnivals, etc. fill all seasons on the calendar.
- Outdoor Recreation: The region abounds with year-round outdoor recreation opportunities—Alpine and Nordic skiing, snowmobiling, wildlife viewing, water recreation, ice climbing, hiking, snowshoeing, and soaking in one of the region’s hot springs are just a sampling.
- Destination Lodging & Meeting Facilities: Several communities in the region have properties and facilities that can accommodate small to mid-size meetings and conventions. Bozeman and Big Sky also have full-service entities with the capacity to host larger groups.
- Bozeman Yellowstone International Airport: As the busiest airport in the state, BZN has service from 9 airlines and direct flights from 23 destinations.
- Open Lands: Access to BLM lands, Forest Service land, national & state parks, all just a short distance from any point in the region.
- Four Montana State Parks: Cooney Reservoir, Missouri River Headwaters Madison Buffalo Jump and Greycliff Prairie Dog Town
- Regional Partnerships: Yellowstone Country maintains close ties with both public and private sector partners throughout the region, which enables us to better promote an area or activity based on the needs and wants of the locals.
- Statewide Partnerships: Partnering with MOTBD and the other Regions/CVBs for specific Joint Ventures has always been an integral part of YC’s strategy. Additionally, partnering with state agencies and other entities remains a priority. We will continue to work with the Montana Film Office, Montana State Parks, etc. as opportunities present themselves.

OPPORTUNITIES

- Seasonality: While this is also a challenge, seasonality presents an opportunity to develop and/or grow our tourism product in the very distinct seasons. Winter in Yellowstone Country continues to grow, and in places like Big Sky, it is the “premier” season; however, there is still ample room for growth in winter. There is also opportunity to promote the spring and fall seasons to Montana residents, empty-nesters, and singles.
- Opportunity to entice a younger demographic: those looking for endless outdoor recreation and rich cultural experiences.
- Increasing air service to new & existing markets—BZN now has direct flights to metro areas such as Boston, Austin, Charlotte and south Florida that provides an opportunity to promote this region to travelers from those markets.
- Outreach and Education for both residents and nonresidents: An opportunity exists to implement an ongoing outreach program for residents while implementing an awareness factor into the marketing mix for non-residents.
- Rural Communities & Areas: Despite being the smallest geographic region in the state, Yellowstone Country is still largely rural, and the opportunity exists to move visitors from the heavily congested areas into the more rural outreaches by promoting day trips, scenic routes and activities in these places.

CHALLENGES

- Inclement Weather Conditions/Natural Disasters: Wildfire, floods, etc.
- Climate Change: Affects recreation (such as fishing), the economy (tourism-related jobs) and our environment.
- Transportation Issues: Public transportation, seasonality of service.
- Economic Climate: Reduced promotion funding, recession, etc.
- Infrastructure: As the number of visitors continues to increase, infrastructure issues are a concern.
- Crowding/Overuse in YNP and specific areas of the region: over-capacity issues.
- Seasonality: Weather, amenities/service availability and staffing all have an impact on the potential growth of shoulder seasons.
- Increasing diversity issues: Making sure all visitors are welcomed.

- Competition: Travelers can choose any destination in the competitor set, so it is a challenge to make sure we give them the differentiation reasons to choose this destination.
- Public Health Issues: Including COVID-19 variants and other communicable viruses.
- Workforce issues: Wages, housing, availability, etc.
- Federal & State government-mandated closures & restrictions
- Resident negative sentiment towards tourism

2. Align with Montana Brand

Briefly describe how your destination aligns with the Montana Brand.

MONTANA BRAND AFFILIATION

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

Additionally, the region is the epitome of the BRAND MT statements:

1. We are simple, but not unsophisticated.
2. We are confident, but not arrogant.
3. We are genuine, but not old-fashioned.
4. We are grounded, but not stuck in our ways.

SPECTACULAR, UNSPOILED NATURE Yellowstone Country is anchored by two major iconic destinations: Yellowstone National Park and the Beartooth All-American Road (BAAR). Custer-Gallatin National Forest, Absaroka-Beartooth and Lee Metcalf wilderness areas, BLM areas and city/county trail systems are all within a short distance from population centers, so one can be in any community in the region and truthfully say they are "surrounded by spectacular, unspoiled nature." YC is one region in the state that presents visitors both spectacular mountain vistas with panoramic valleys and sweeping, wide-open plains just a short distance apart.

BREATH TAKING EXPERIENCES BY DAY, RELAXING HOSPITALITY AT NIGHT As the Montana region that borders Yellowstone—America's first national park—there's something for both the adventurous and those who prefer the quiet side of the outdoors. Whether that includes hitting the ski slopes and trails, soaking in natural hot springs, camping in any season (and in any style of lodging), or exploring the great outdoors by hiking, mountain biking, snowmobiling or even dogsledding, Yellowstone Country has it all.

The region has a multitude of art galleries, nature centers, museums, and historical sites. Local attractions, festivals and events offer fun opportunities for visitors to immerse themselves in community culture, whether it is attending a rodeo, taking in a lively music festival, participating in and/or watching an exciting winter ski or snowmobile event or just spending time taking in the surroundings.

VIBRANT, CHARMING SMALL TOWNS THAT SERVE AS GATEWAYS Showcasing the region's diverse, welcoming communities is an integral part of YC's marketing strategy. Each place has a unique local culture that makes it stand apart from neighboring towns. Explore Gardiner, Red Lodge, Cooke City, Livingston, Bozeman, Big Sky, West Yellowstone, and every town in between. There are hidden (and not-so-hidden) gems for experiencing local community hospitality. These communities are the gateways to those incredible adventures that await!

3. What is the strategic role of your DMO?

Select all that apply: *Destination Marketing, Destination Management, Destination Stewardship, Destination Development*).

Destination Marketing, Destination Management, Destination Stewardship, Destination Development

Based on the strategic role you serve, provide the following information.

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

For FY 23, Yellowstone Country has determined our PRIMARY function is still destination marketing. However, as we monitor the role changes for DMO's in today's travel scenario, we will also begin implementing specific destination management, stewardship & development functions. We do expect our strategic role in Destination Management, Stewardship & Development to expand over the coming years.

Destination Marketing Audience

Direct marketing campaigns and each of the associated marketing tools/resources (website, social media platforms, travel planner and scenic map, etc.) are all highly integrated, providing the right information at the right time during the inspiration, orientation, and facilitation phases of trip planning.

1. i.

CONSUMER

YC identified a core group of target audiences in FY17 and has continued marketing to them in subsequent years, while also adding in new markets identified through evaluation of research data, campaign tracking, social media analysis, locations where there's new/increased air service to Montana and media outreach.

Geographic Markets

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

Illinois (Chicago)

Oregon (Portland)

Colorado (Denver)

Texas (Austin, Dallas/Fort Worth, Houston)

Georgia (Atlanta)

Minnesota (Minneapolis/St. Paul)

Washington (Seattle)

Pennsylvania (Philadelphia)

Utah (Salt Lake City)

Massachusetts (Boston)

New York (New York)

Tennessee (Nashville)

North Carolina (Charlotte)

South Florida

Secondary Geographic Markets (dependent on traveler access)

Saskatchewan, Alberta, British Columbia, CANADA

*These markets were identified based on FY21 & FY 22 inquiries (including website inquiries, live chats, and incoming calls) as well as VisaVue data and emergence of new direct flight markets.

Key Demographic Markets

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

Affluent with a household income over \$80k

Well-educated

Married with children

*** These characteristics were identified based on Destination Analysts reporting.**

Key Psychographic Markets

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

Lifestyle - active, outdoor-recreation oriented, frequent travelers

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

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

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

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

Families – Family travel

***These characteristics were identified based on Destination Analysts reporting.**

ii: EARNED MEDIA/PUBLICITY

Yellowstone Country has focused and will continue to focus on family-travel journalists and influencers, as well as those that specialize in outdoor recreation. Yellowstone Country will also continue to leverage journalists and influencers with many followers on Instagram to continue to grow its audience on that platform.

Our hope is to work with journalists and influencers that match our consumers both psycho-graphically and geographically.

iii. GROUPS

Yellowstone country does not promote to group travel due to limited meeting and convention facilities within the region.

iv. EVENTS

Yellowstone Country will continue to place an emphasis on its events through promotion of its events calendar and blogs via the website, email marketing and social media.

v. FILM

Yellowstone Country will continue to look at partnerships on film projects on an individual basis.

vi: TOURISM INDUSTRY PARTNERS

Yellowstone Country is open to future collaboration with tourism industry partners.

Destination Management Target Audience: destination managers and marketers, hotel developers, tour operators, business owners, government officials, and others concerned with the long-term sustainability and competitiveness of tourism destinations.

Destination Stewardship Target Audience: other tourism organizations, chambers of commerce, land managers, and other public & private stakeholder organizations

Destination Development Target Audience: destination managers, VICs, chambers, downtown associations

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

(Destination MARKETING Supporting Research)

Yellowstone Country receives and analyzes data from the following resources:

- Destination Analysts
- nSight
- VisaVue
- Arrivalist (shared by partners)
- AirDNA
- Cision
- Skift
- RMI
- USTA
- MLHA/STR
- VICs
- Internal Campaign Analysis
- Research/Surveys
- MOTBD/Regions/CVBs/Local Chamber Data
- Bozeman Yellowstone International Airport
- Montana Tourism Data-Card Spend report (on marketmt.com)
- US Travel Association

2021 ITRR Data for Yellowstone Country Region

Average Length of Stay in MT 5.94 nights

Visitor Characteristics

17% of groups with all first time visitors

70% of groups with all repeat visitors

82% Plan to return within 2 years

19% Flew on a portion of their trip

Of Nights Spent in MT:

62% of nights are spent in Yellowstone Country

Visitor Gender:

60% Male

40% Female

25% First time visitor

Travel Group Type:

17% Self

49% Couple

24% Immediate Family

Average Group Size: 2.41

Travel Group Size:

16% 1 traveler

60% 2 travelers

7% 3 travelers

11% 4 travelers

Age Ranges:

7% 0-5 years

9% 6-10 years

9% 11-17 years

8% 18-24 years

12% 25-34 years

17% 35-44 years

- 22% 45-54 years
- 33% 55-64 years
- 40% 65-74 years
- 12% 75 and over

Household Income ranges:

- 6% Less than \$50,000
- 20% \$50,000 to less than \$75,000
- 16% \$75,000 to less than \$100,000
- 34% \$100,000 to less than \$150,000
- 12% \$150,000 to less than \$200,000
- 13% \$200,000 or greater

Sites Visited:

- 73% Yellowstone National Park
- 34% Glacier National Park
- 19% Hot springs
- 14% Other Montana State Parks
- 12% Museum of the Rockies, Bozeman
- 8% Missouri Headwaters State Park
- 5% Grizzly & Wolf Discovery Center, West Yellowstone

Reasons for trip:

- 62% Vacation/recreation/pleasure
- 18% Visit friends/relatives/family event
- 13% Just passing through

Activities:

- 51% Scenic driving
- 51% Day hiking
- 39% Nature photography

- 39% Wildlife watching
- 29% Car / RV camping
- 27% Recreational shopping
- 25% Visit local brewery
- 19% Visiting other historical sites
- 18% Visiting Lewis & Clark sites
- 16% Visiting museums
- 11% Fishing / fly fishing
- 10% Dinosaur attraction
- 10% Viewing art exhibits
- 8% Skiing / snowboarding
- 8% Birding
- 8% Visit farmers market
- 6% River rafting / floating

If on Vacation, Attracted to Montana for...

Primary Attraction	All Attractions
22% Glacier National Park	39%
22% Yellowstone National Park	65%
17% Mountains / forests	69%
14% Open space / uncrowded areas	56%
6% Ski / Snowboard	14%
5% Family / friends	19%

Visitor Residency:

- 11% Washington
- 8% California
- 8% Utah
- 7% Minnesota

6%	North Dakota
5%	Virginia
4%	Oregon
4%	Florida
4%	Wisconsin
4%	Idaho
3%	Pennsylvania
3%	Wyoming
3%	Arizona
3%	Ohio
3%	Colorado
2%	Tennessee
2%	Illinois
2%	Georgia
2%	Texas
2%	Nebraska
2%	Michigan

Info Sources Used for Trip Planning:

Used no sources	15%
Info. from friend/relative living in MT	24%
Info. from previous visitor(s) to MT	22%
National Park brochure/book/website	31%
Mobile apps	19%
Social media (i.e. Facebook)	11%
Online travel agent (e.g., Travelocity)	3%
Other	5%
Regional MT travel guide(s)	5%

Sources Used During Trip:

Search engine (e.g., Google)	59%
Used No Sources	11%
Info. from friend/relative living in MT	20%
National Park brochure/book/website	34%
Visitor information center staff	17%
Other	7%
Brochure information rack	12%
Official MT website (VisitMT.com)	7%
Official MT guidebook magazine	8%
Regional MT travel guide(s)	9%
State Park brochure/website	10%
Official highway information signs	18%
Billboards	6%

BZN Airport Data (latest statistics--March 2022)

Passenger traffic for March 2022 was 206,216, up 41.0% from the previous March record of 146,301 set in March 2019. Nationally, March passenger traffic was down approximately 12.3% compared to March 2019. BZN has now set month over month records for the past twelve consecutive months. BZN has handled 2,165,152 passengers over the 12 consecutive months ended 3/31/22.

BZN projects April 2022 passenger numbers to continue to be in record territory at approximately 130%-135% of April 2021's record level.

BZN total passengers for 2022 compared to 2021 and 2020:

	Total Revenue Passengers				
	2022	2021	2020	% Chg 2021	% Chg 2020
January	167,043	86,606	137,154	92.9%	21.8%
February	171,096	99,083	142,969	72.7%	19.7%
March	206,216	133,705	89,352	54.2%	130.8%
April		98,434	2,932		
May		131,968	12,262		
June		223,827	37,057		
July		277,355	86,750		
August		254,975	96,276		

September	195,262	86,592		
October	156,192	69,913		
November	117,516	50,199		
December	165,268	78,319		
YTD	544,355	319,394	369,475	70.4% 47.3%
Total	1,940,191	889,775		

YCFI VIC Top 15 Origin States' Visitation:

1. MT
2. CA
3. TX
4. WA
5. UT
6. CO
7. WY
8. FL
9. MN
10. OR
11. NY, ND, ID, SD
12. WI
13. PA
14. GA
15. AZ

Social Media

Social trends in 2022 are pointing to an emphasis on the creator economy, showcasing the human side of a brand, plus authenticity, sustainability, accountability, and giving back. Other trends important to note include short-form, live video is still popular across all channels with the TikTok in particular, continuing to grow.

Following these trends, Yellowstone Country has partnered with Stephanie Quail as a brand ambassador for a second year. This partnership has proven to be incredibly successful, generating engagement, enthusiasm, and brand loyalty. Other creators we will continue to partner with are Traveling Mel, plus the results of upcoming press trips in direct flight markets. These partnerships include blogs, videos, stories, reels, and social media posts.

With a new focus on Destination Management and Destination Stewardship, we will incorporate messaging related to trail etiquette, safety, history, environmental stewardship, and an appreciate of our landscapes.

Included in this are our weekly emails and blog posts, which are pushed out through our social channels.

Yellowstone Country notes the audience size and continued growth in TikTok and plans to begin the discovery phase of how other tourism destinations are incorporating this channel into their marketing mix and will determine whether this is an endeavor that will lend well to our ROI.

10 Social Media Trends that Will Be Huge in 2022

8 Social Media Trends to Watch in 2022

Social Trends 2022

Social Media Trends Taking Off in 2022 (And How to Leverage Them)

Email Marketing

Email marketing continues to be one of the most effective means for communicating with our audience. Hubspot reports email marketing generates \$42 for every \$1 spent, a 4,200% increase in ROI. Other data cited include:

- 78% of marketers have seen an increase in email engagement over the last 12 months.
- 4 out of 5 marketers would rather give up social than email.
- 74% of baby boomers think email is the most personal channel to communicate with brands.
- Across all industries, the average email open rate is 19.8%, click through 11.3% and bounce rate, 9.4%.

Email marketing also allows you to be human with your audience, showing them your personality through storytelling. Consumers want to see behind the scenes and feel like a part of the organization.

Our email engagement continues to grow, with increased opens and click throughs, and often replies from our subscribers. We will continue to utilize this method to tell the stories of YC. As with social, we will include information on land stewardship, highlighting the work being done in our region, along with education on safety, best practices, and ethics in the outdoors.

Email Marketing Trends to Watch Out for in 2022

The Ultimate List of Email Marketing Stats for 2022

12 Pros Reveal the Email Marketing Trends That'll Dominate 2022

(Destination MANAGEMENT Supporting Research)

As Yellowstone Country begins implementing destination management functions into our overall operations, we will focus on developing programs & projects that fit under one/more of these cornerstone: place, people, product & process.

Your destination needs to offer visitor servicing through social. Here's why. | Destination Think

8 things your DMO needs to know about its tourism operators | Destination Think

A Critical Opportunity for Tourism & DMOs to Lead in the Recovery | Miles Partnership

Change management at the DMO: Why destinations need to be proactive | Destination Think

State of the Travel Industry: A Robust Plan for the Future of Travel | U.S. Travel Association (ustravel.org)

From marketing to managing -- the evolving role of DMOs: Travel Weekly

(Destination STEWARDSHIP Supporting Research)

More & more destinations are moving in the direction of including at least some sustainability & stewardship practices & projects to help maintain a manageable tourism & travel economy.

Destination stewardship – where tourism meets care of the destination (destination-review.com)

5 Reasons Why DMOs Should Care About Sustainable Tourism (aboutdci.com)

'Destination Stewardship' Is the Latest Framework for Promoting Responsible Tourism | TravelAge West

(Destination DEVELOPMENT Supporting Research)

Providing visitor services is an essential function of every Destination Management Organization (DMO). Yellowstone Country will implement supportive programs & projects to help communities provide the best visitor experience.

According to the Solimar Institute, "DMOs are responsible for engaging local communities to ensure that tourism development is a mutual benefit between tourism stakeholders and local residents in the destination. This strategy is also vital for DMOs to preserve the cultures of destinations."

U.S. Experiential Traveler Trends 2019: New Skift Research

The Adventure Travel & Trade Association recommends DMO's work to help communities to develop innovative products to help destinations move forward with reeducation, education, and training (for both destination professionals and their regional suppliers), new product development for the post covid-19 traveler. **Strategic Opportunities for Destination Recovery & Resilience | Adventure Travel Trade Association**

3c. What are your emerging markets?

NICHE MARKETS

In-State Residents

If budget allows, we will create in-state 'staycation' campaigns for Montanans, promoting the spring and fall shoulder seasons. Messaging will encourage locals to take advantage of Montana's beauty and adventure, all while escaping the crowds of peak seasons. FY20 and FY21 included specific digital advertising campaigns for in-state travelers. Should budget allow, we will look at including continued in-state traveler outreach in FY23.

Marketing to our in-state travelers will take on a somewhat higher priority than in years past. Top industry research companies such as Destination Analysts, Adara and the US Travel Association are all pointing to drive markets as being the travel segment that is recovering the quickest. In the weekly research summary, the week of May 10, DA showed that research respondents indicated they would take a driving trip for 3 to 5 days and would travel distances of up to 400 miles. This points to Montana residents as being a key target market for us in the wake of COVID-19, since travelers coming from other regions of Montana to Yellowstone Country would likely be traveling within that distance parameter.

The focus of our marketing efforts to both in-state and regional drive markets (WY, the Dakotas, UT, ID, WA, etc.) will be to promote outdoor recreation in conjunction with the hospitality component; there is a significant opportunity to push the message that we have uncrowded (i.e., relatively SAFE) places to recreate and experience what the region has to offer.

A subset of the in-state audience is visiting friends and family members. This group is less likely to require the full spectrum of tourist services (i.e., hotels and restaurants), but highly likely to show interest in experiencing Yellowstone Country. Family members visiting students at MSU and UM are a special segment to consider in this group.

Family Travelers

Family travel is a growing market to all of Montana, and Yellowstone Country is no different. Yellowstone Country's natural attractions and proximity to Yellowstone National Park make it a likely fit for family vacationers. Yellowstone

Country would look at the creation and promotion of a family fun guide geared specifically for family travel audiences in FY23.

Western Ski Audiences

Direct marketing to skiers who frequent western ski resorts (i.e., Colorado and Utah), in addition to a continued presence in select markets, promoting YC's accessibility and adventure. FY17-FY22 all included heavy print, digital, social media and video campaigns aimed at western ski audiences. FY23 will include that as well, including more video creation and itinerary building on the Yellowstone Country website.

History Audiences

Travelers are often natural history lovers, with a yearning to learn about the world, its people, places, and cultures. History ties so much together, and with a guide along the way to help make connections, historical facts and stories have a greater emotional impact. In FY20 & FY21 we addressed this audience in the Glaciers to Geysers joint venture with Glacier Country. FY23 would include continued promotion, with the possibility of added partners and projects.

Motorcyclists

Motorcyclists are a growing niche market that provides ample opportunities for targeted messaging within the region, and potentially in partnerships with neighboring regions. Opportunities include itineraries and maps featuring unique and appealing roadways, targeted media buys and a combination of in-state (drive) and out-of-state (fly-ride) messages. FY21 included motorcycle-specific targeting with the Glaciers to Geysers joint venture with Glacier Country. FY21 also included videography and photography specific to motorcycling to be used in future campaigns, while the Glaciers to Geysers project included continued promotion to this audience. Because this is a growing market, we will continue to promote to this niche market in FY 23.

Snowmobilers

Snowmobiling continues to expand in popularity and attract new audiences. Between guided trips and the option to go sled on your own, there is something for everyone. Snowmobiling campaigns could be focused within the region, or potentially in partnership with other regions. Similar to the motorcycle audience, snowmobile campaigns could include itineraries, maps, targeted media buys and a combination of in-state (drive) and out-of-state (fly-ride) messages. FY19 included the creation of snowmobile-specific targeting with the Glaciers to Geysers joint venture with Glacier Country. FY20 & FY21 included videography and photography specific to snowmobiling to be used in future campaigns. In FY23 the Glaciers to Geysers project will include continued promotion to this audience.

Birding Enthusiasts

Birding has become a valuable niche activity, and there are plenty of locations within the region, and in neighboring regions, that continue to draw this group. One potential way to capture this audience would be to create a map of birding locations, such as the Missouri Headwaters State Park, and events such as Bridger Bowl's Raptor Festival in October.

Detailed information could be provided by break-out maps of specific locations within the larger map. This could be accomplished within the region, or with partner regions, ideally expanding to a state-wide birding map over time. FY20 included the updating of our birding-specific information on our website. YC created its own version of a birding guide in FY22, and in FY 23 we will be adding specific marketing to target this audience.

Military Families

Military families and bases present a unique niche marketing opportunity as well. Due to the nature of their work, military families often travel at various times throughout the year (not necessarily restricted to standard summer and winter trips)

and tend to take longer vacations in comparison to citizen families. In addition, bases often provide news and communication outlets unique to bases, providing targeted channels to reach this group. FY20 included the partnership of Megan Wristen, an influencer and travel writer who has a big following with military families. She spent four days on a familiarization trip in September of 2019 in the Yellowstone Country region. We also worked with Sierra Redmond on an in-bound press trip in FY22; she releases a multitude of social media posts & guest blogs for YCMI platforms. YCMI sees this as a growing market for us, and will continue targeting this audience.

Craft Beverage Enthusiasts

Craft beverage venues (breweries, distilleries, wineries, cideries) have a growing following and are found frequently throughout Montana. A targeted campaign could be considered for a craft tour, for instance. Should budget allow, we would look at additional ways to target this audience in FY23.

EMERGING MARKET

Promoting the region's best restaurants to travelers who are interested in fine dining, unique dining experiences and Montana's hospitality. Should budget allow, we would look at ways to target this audience in FY23.

Entertainment Seekers

If budget allows, we will capitalize on visitors who are coming to Montana for entertainment purposes (i.e., concerts, festivals, rodeos, etc.), encouraging them to extend their visit to include time exploring Yellowstone Country. As new venues, such as Bozeman's historic Rialto Theatre, continue to sprout up, additional audiences will be drawn to Yellowstone Country for entertainment. A new music venue, The Elm, debuted in Bozeman in December 2020. Should budget allow, we would look at ways to target this audience in FY23.

Western Culture Seekers

With a wide variety of ranch-style accommodations spanning from working dude ranches to five-star venues, there are ranches to suit every visitor's idea of the perfect western vacation. Similarly, outfitters provide hands-on, genuine experiences in Yellowstone Country. With many visitors drawn to an authentic Montana experience, ranches and outfitters provide another means to reach a niche audience. Videography and photography for rodeos was a project in FY22, and we will look at additional ways to target this audience in FY23.

International Visitors

Due to the uncertainty of international travel to the area because of COVID, we will be reassessing this as an emerging market later in the year; if we feel the market conditions are favorable, we will develop a marketing strategy & campaign focused to this audience.

Urban Areas

Marketing campaigns aligning with press events. Selecting urban areas of focus in relation to identified key markets. In FY 22, the target urban areas for our outreach events are Boston, Washington D.C., Austin and Seattle. Anticipated markets for FY 23 include urban areas in California and Texas, in addition to new markets in New York, Pennsylvania, and the southeast area of the U.S.

Direct Flight Markets

There are indications that consumers are resuming regular air travel, so we intend to continue our digital and programmatic outreach in our identified fly markets. Our strategy will be to create awareness around direct flights and entice travelers to consider Yellowstone Country as their next destination.

Current Direct Market Flights include:

Atlanta	Austin
Boston	Charlotte
Chicago	Dallas/Fort Worth
Denver	Detroit
Fort Lauderdale	Houston
Las Vegas	Los Angeles
Minneapolis/St. Paul	Nashville
Newark	New York (La Guardia and JFK)
Oakland	Philadelphia
Phoenix	Portland
Salt Lake City	San Francisco
Seattle/Tacoma	

4. Define and describe your overall goals.

A goal is an idea of the future or desired result that a person or group of people envisions, plans and commits to achieve.

Goal 1: Increase YC BRAND Recognition: Promote Yellowstone Country as a premier year-round leisure destination, using the “Beyond Yellowstone” concept across all seasons. (Destination Marketing).

Objective: Increase visitation to the region in shoulder seasons.

Goal 2: Increase recognition of communities & rural areas as unique destinations within the region. (Destination Marketing)

Objective: Build awareness of what there is to experience in the smaller communities and more rural areas of the region.

Objective: Increase our tourism product by working with the state and other partners to develop and promote authentic experiential things, such as Dark Skies, Made in Montana/Taste Our Place, etc.

Goal 3: Increase community and resident engagement in Yellowstone Country efforts to promote the region. (Destination Management) (Destination Stewardship)

Objective: Engage with stakeholders to inform & educate on the value of tourism to the region.

Objective: Partner with the regional communities to provide VIC funding.

Objective: Provide Call Center Services for visitors.

Goal 4: Increase our tourism experience & product across the region. (Destination Management)(Destination Development)

Objective: Support & promote new & growing community attractions & events.

Objective: Implement a cooperative program that helps VICs improve their visitor amenities.

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

Methods to be used in Destination Marketing, Management, Stewardship & Development efforts:

- Administration
- Joint Ventures
- Opportunity Marketing
- Cooperative Marketing
- Agency Services
- Marketing Resources
- Paid Media
- Earned Media
- Website Development
- Education/Outreach
- Research
- Product Development
- Visitor Services

DESTINATION MARKETING TACTICS & PROJECTS:

Tactics: To build a compelling and memorable brand that is inviting to potential high-value, low-impact travelers by placing strategic multi-media campaigns, improving the website to be the 'go-to" site for planning visitation to the region, and using our social media platforms to increase awareness of the attractions, activities and amenities found in the area.

YC will leverage its hashtags/taglines to embody the spirit of visitors: **#BoldlyGoMT, #BeyondYellowstone, The Yellowstone you haven't seen yet, Winter is waiting** and **Back to Adventure** in our advertising and publicity efforts.

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

Projects:

Multi-Media Campaigns CONSUMER ADVERTISING:

- Online/Digital

- Print
- Video/Photography
- Website/Electronic
- Webpage Marketing/SEO/SEM
- Joint Ventures
- Travel Guide
- Printed Materials
- G2G Content

PUBLICITY:

- Media Outreach
- Press/Influencer FAM Trips
- Email Marketing
- Blogging

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

- Website
- Travel Guide
- Scenic Road Map
- Call Center
- Visitor Information Centers Support
- DMO training/support
- Community Outreach

JOINT VENTURE Marketing Projects YC would consider any Joint Venture opportunities with MOTBD that fit our goals; these could be consumer advertising campaigns, publicity events/trips, social media, research, destination marketing, etc. YC will continue to foster partnerships with CVBs and other regions to allow for a greater impact of marketing efforts through social media, press trips, digital and print advertising to promote tourism. The types of partnerships we would be interested in are those that leverage existing budgets, but also promote the commonalities between partners.

For example:

Yellowstone Country and Glacier Country partner together on the Glaciers to Geysers campaigns that are multifaceted and continue to expand each year. We started with promoting the snowmobiling opportunities each region has, then added motorcycle routes, winter activities and a museums and historical sites promotion. Under this partnership, each region's assets are promoted, but the messaging is "blended" to show visitors that they have multiple options for these activities and can move seamlessly between the two regions to get the full experience.

YC participates in the Dinosaur Trail partnership that includes several tourism regions, MOTBD and the private sector (museums and historical sites). This cooperative project encompasses a large portion of the state, with interest from both residents and nonresident visitors continuing to increase.

Additionally, YC offers co-op advertising opportunities for regional partners that are not a CVB, working to provide an opportunity for partners to advertise nationally. In FY21, we are offering annual, winter-specific, and warm-season specific co-ops, with great participation from private sector businesses, such as Sage Lodge and Red Lodge Mountain, as well as our traditional CVB partners.

YC region co-ops that have been the most successful have been those that help communities raise awareness and/or promote local events. Through our Cultural Tourism Grant Program, we collaboratively partner with other nonprofit entities to help new festival/events/happenings to get off the ground, or help existing ones continue to grow.

YC also partners with regional CVBs and businesses for several press trips and video shoots throughout the region each year. These are highly successful for us because they not only raise awareness of the region, but we gain content and assets to use for our other promotional efforts.

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

As stated in the previous section, two of the ongoing cooperative partnerships we are involved in have been successful for us: The Joint Venture Glaciers to Geysers with Glacier Country and the Montana Dinosaur Trail.

DESTINATION MANAGEMENT TACTICS & PROJECTS:

Tactics: Tactics include continuing the current VIC Staffing Program (with possible enhancement to make it a year-round program that could also include staff training costs), and continuing using a call center to manage direct inquiries.

Projects:

VIC Staff Funding & Training Program Yellowstone Country has administered a VIC Staffing grant program for over 25 years for the warm season months. In that timeframe, we have seen tremendous growth in the use of VIC services by travelers as our visitation numbers continue to climb. VICs are managed by chambers & other non-profit organizations, and having limited funding, they are challenged in trying to hire & retain quality travel counselors, so this program provides the solution. Given the substantial increase in visitation over the past two years, YC has identified this program as being a crucial part of visitor services. Since YC is focusing on spreading visitation across seasons & areas, we plan to expand this project to include funding for a longer period of time than the current program allows, and also including funding for staff training costs.

Call Center The call center will help supplement destination management efforts by helping orientate and facilitate visitors to avoid crowded areas in a similar fashion as a VIC. The substantial increase in visitation over the previous two years necessitates the continued use of the call center to help visitors navigate Yellowstone Country.

DESTINATION STEWARDSHIP TACTICS & PROJECTS

Tactics: Yellowstone Country will engage with stakeholders through a series of communications outreach events focused on the value of tourism to the area, and to help facilitate partnerships that will help manage the destination.

Projects:

Community Meetings YC will meet hold a minimum of three regional meetings with CVBs, chambers, and community leaders to discuss local efforts pertaining to their respective sustainability & stewardship needs.

Collaborative Implementation From those meetings, we will determine & implement specific collaborative projects that may include, (but is not limited to), contracting with a consultant to help define a plan of action, defining specific niches & then partnering on media campaigns focused on responsible messaging for each community/area, crisis management programs, recycling, etc.

DESTINATION DEVELOPMENT TACTICS & PROJECTS

Tactics: YC will engage VIC managers to help determine the elements for a new Visitors Services program to be implemented in 2022. We will also revamp the current Cultural Tourism program to make it as accessible as possible for events/attractions focused on developing new product or growing what they offer. Finally, we will implement a communications outreach program to help facilitate collaboration on stewardship & sustainability issues.

Projects:

VIC Enhancement Program Yellowstone Country will develop & implement a VIC Enhancement & Improvement grant program that allows us to partner with our communities to improve the visitor experience at our funded VICs. The program will provide funding for much-needed VIC improvements such as painting, installing signage & brochure racks, updating & replacing aging restroom facilities, etc.

Cultural Tourism Event Grant Program For the past seven years, Yellowstone Country has provided a Cultural Tourism grant program specifically focused on supporting new events & attractions and/or helping already established ones to grow & enhance their product. This program has been highly successful, and there is an opportunity to expand this program even more with the return of signature events and the willingness of communities to develop new tourism product.

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Objectives/Metrics/Evaluation

Objectives	Measurable Metrics for Success	Report the Metric Achieved	Evaluation of Measurable Metrics for Success	Add'l Attchmnt
<i>Objective: Increase our</i>	Metric: Participate in 3 JV's that focus on increasing/enhancing awareness of new (or lesser known) tourism			

<p>tourism product by working with the state and other partners to develop and promote authentic experiential things, such as Dark Skies, Made in Montana/Taste Our Place, etc.</p>	<p>experiences/product.</p>			
<p>Objective: Engage with stakeholders to inform & educate on the value of tourism to the region.</p>	<p>Metric: Host 3 community round-table discussions to share information & identify partnership opportunities.</p>			
<p>Objective: Partner with the regional communities to provide VIC funding.</p>	<p>Metric: Provide funding for 11 VICs to have travel counselors on site for the timeframe of Memorial Day-September 30th. We will use the VIC completion reports to evaluate the success of this program.</p>			
<p>Objective: Provide Call Center Services for visitors.</p>	<p>Metric: Increase all inquiries (live chat, phone calls, emails and travel guide requests) received through the Call Center at least 5% over the FY 22 #'s. Call Center inquiries have held steady for several years; however, with increased functionality, including adding the Live Chat option and more potential visitors doing their trip planning electronically, we should realistically see an increase for FY 23.</p>			
<p>Objective: Support & promote new & growing community attractions & events.</p>	<p>Metric: Provide grant funding for a minimum of 3 attractions & events that are new and/or are needing support for growing their audience.</p>			
<p>Objective: Increase visitation to the more rural areas of the region in the shoulder seasons.</p>	<p>Metric: Increase bed tax collections 2% in winter, spring & fall quarters., benchmarking against collections for the same timeframes in 2022.</p>			

<p>Objective: Build awareness of what there is to experience in the smaller communities and more rural areas of the region.</p>	<p>Metric: Host 3 influencers/travel writers on press trip(s)—itineraries will be focused on rural areas.</p> <p>Metric: Purchase advertising in community travel guides. Currently, YC has display ads and/or advertorial content in 2 other region and 3 CVBs guide books. We will continue with these 5, and work toward an ideal target of being in at least 8 of the guides, as we feel this is an opportunity to help move visitors from one region to another. FY 23 Targets: Missouri River Country, Southwest Montana, Central Montana and Big Sky.</p> <p>Metric: Promote a minimum of 10 community events in our social media efforts, with the focus being on those that take place in the rural areas & have potential to draw people off the beaten path. Example: Fishtail Days & Cooke City Fish Fry are two events that meet this criteria--both are in rural areas of the region & both are seeking to increase attendance & grow to a signature event status.</p>			
<p>Objective: Implement a cooperative grant program that helps VICs improve their visitor amenities.</p>	<p>Metric: VICs in the region receive enough funding to accomplish qualified, approved improvement projects. Based on preliminary discussions with VIC managers, we feel assisting a minimum of 3 VICs with these improvement projects would be a successful outcome; however, the ideal outcome & greatest success would be that all 11 VICs participate.</p>			

DMO Budget

Allowable Methods	Amount Budgeted	% of Budget Allocated	Amount Expended	% of Budget Expended
Administration	\$250,000.00	6.7	\$0.00	0
Agency Services	\$740,000.00	19.9	\$0.00	0
Cooperative Marketing	\$100,000.00	2.7	\$0.00	0
Earned Media/Tourism Sales	\$185,000.00	5.0	\$0.00	0
Education/Outreach	\$20,000.00	0.5	\$0.00	0
Joint Venture	\$380,000.00	10.2	\$0.00	0

Marketing Resources	\$70,000.00	1.9	\$0.00	0
Opportunity Marketing	\$19,665.00	0.5	\$0.00	0
Paid Media	\$1,375,000.00	37.1	\$0.00	0
Product Development	\$50,000.00	1.3	\$0.00	0
Research	\$20,000.00	0.5	\$0.00	0
Visitor Services	\$428,000.00	11.5	\$0.00	0
Website Development (Online, Website, Mobile)	\$80,000.00	2.2	\$0.00	0
	\$3,717,665.00	100.00	\$0.00	0.00

Narrative Evaluation

Reg/CVB Required Documents

Description	File Name	File Size
BOD meeting minutes approving FY 23 DMO plan & budget	BM Minutes 4-12-22.doc	93 KB
BOD meeting minutes approving FY 23 DMO plan & budget	BM Minutes 4-12-22.doc	93 KB
BOD meeting minutes approving FY 23 DMO plan & budget	BM Minutes 4-12-22.doc	93 KB
FY 23 Certificate of Compliance	FY 23 Certificate of Compliance.jpg	120 KB
FY 23 Certificate of Compliance	FY 23 Certificate of Compliance.jpg	120 KB
FY 23 Certificate of Compliance	FY 23 Certificate of Compliance.jpg	120 KB
YCMI current Organization Bylaws	YCMI By-laws Revision FINAL 1-2015 .doc	80 KB
YCMI current Organization Bylaws	YCMI By-laws Revision FINAL 1-2015 .doc	80 KB
YCMI current Organization Bylaws	YCMI By-laws Revision FINAL 1-2015 .doc	80 KB

