

VISIT *Billings*

MONTANA'S  TRAILHEAD



**MARKETING PLAN
AND BUDGET**

VisitBillings.com



2018-2019

TABLE OF CONTENTS

ESTABLISHMENT OF DESTINATION	3
Introduction.....	4
About Billings.....	5
What Are They Saying About Us	6
Executive Summary.....	7
Visit Billings Funding.....	8
Strengths	9
Opportunities.....	11
Challenges.....	13
MOTBD Brand Pillar Alignment	14
TRAVEL DECISION PROCESS	15
Three Phases: Inspire, Orient, Facilitate	16
MARKETING STRATEGY	18
“Forge Your Own Path” Brand Evolution	19
Summer Strategy.....	20
Potential Out-Of-State Markets	21
Marketing Tactics	22
Regional Target.....	24
Two/Four Wheeled Market.....	25
International	26
Group Tour.....	27
Meetings and Convention.....	28
Sports	29
Cooperative Opportunitites.....	30
Social Media.....	31
Publicity/Earned Media.....	32
GOALS	33
Strategic Goals	34
Measurable Objectives	36
BUDGETS	40





ESTABLISHMENT OF DESTINATION

VISIT BILLINGS

A DESTINATION MARKETING ORGANIZATION

Visit Billings is a leading brand 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 at Montana's Trailhead. The staff is an extension of its stakeholders (lodging partners) working to provide sales, services and marketing support to the local hospitality industry.

As a destination marketing organization or DMO, Visit Billings is an organization charged with representing Billings as a destination, helping with the development of the tourism industry and community through travel and tourism promotion, marketing and strategies.

MISSION STATEMENT

The mission of Visit Billings is to generate room nights for lodging facilities in the city of Billings by effectively marketing the region as a preferred travel destination.

VISIT BILLINGS 2027

Together with community, regional and state partners, the Visit Billings team will continue to strategize with local leaders, community associates and stakeholders to ensure a solid foundation of success into the next decade of travel promotion at Montana's Trailhead while working in the here and now to grow visitation in support of local stakeholders.

BILLINGS IS "MONTANA'S CITY"

Shaped by the Yellowstone River and sheltered by the sandstone Rimrocks, Billings is a place of forever views and forever memories, where urban amenities and modern convenience meet the edge of the genuine frontier. Where the adventure of the untamed wilderness and history are out your front door.

Conveniently positioned in the region as the largest city between Calgary and Denver, Spokane and Minneapolis, Billings proudly serves a trade area serving more than 500,000 residents with diverse shopping, award-winning cuisine, arts and culture.

Warm, genuine people take the time to welcome you and greet you with a smile. Unparalleled access to some of the most breathtaking and historic wonders in the United States including Yellowstone National Park, Beartooth Highway, Bighorn Canyon, Little Bighorn Battlefield, and Pompeys Pillar make Billings an idyllic destination for connecting to the best that Montana offers.

VISIT BILLINGS TEAM

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ABOUT BILLINGS

Billings, population 110,000, is well-positioned in southeast Montana as a gateway to Bighorn Battlefield National Monument, the northeast entrance to Yellowstone National Park, Pompeys Pillar National Monument and urban amenities on the edge of the genuine frontier. Billings is also situated with great access to some of the key areas in Montana's State Park system including Pictograph Cave and Chief Plenty Coups State Parks. The county seat of Yellowstone County and largest city in the state, "Montana's City" is also the region's economic hub. Major industries including agriculture, energy, healthcare, finance, education and tourism all help drive the local economy.

Popular attractions locally include the Yellowstone Kelly Interpretive Site, Walkable Brewery District in Historic Downtown Billings, Montana's only zoo and botanical park, contemporary and western museums, several theaters, music venues, a state-of-the-art public library and a number of outdoor community festivals. Today, Billings offers nearly 50 miles of multi-use trails and 24 miles of bike lanes. From the sandstone Rimrocks to the Yellowstone River, which is the longest free-flowing river in the lower 48, residents of Billings invite visitors to experience the magic of Montana's Trailhead.

Amazing Big Sky summer weather and snowy winters offer ample opportunity for outdoor enthusiasts to experience all four seasons and the accompanying adventures. Nearly 5,000 hotel rooms along with recreational, cultural and adventurous experiences as well as numerous retail and restaurant offerings, plus several hundred thousand square feet of flexible meeting space ready to accommodate any traveler's needs and preferences.



WHAT ARE THEY SAYING ABOUT US

★ **MONTANA TOURISM AWARD** **MARKETING CAMPAIGN OF THE YEAR | MY FAVORITE PLACE SOCIAL MEDIA CAMPAIGN**

Visit Billings is proud to own the Marketing Campaign of the Year title with the Montana Office of Tourism and Business Development. The My Amazing Place Social Media Campaign highlights Team Visit Billings showing off top spots at Montana's Trailhead. Check it out on Facebook [@billingsmt](#)

★ **BILLINGS TO WELCOME THE MARINE CORPS LEAGUE** **MCL CHOOSES BILLINGS AS THE 2019 NATIONAL CONVENTION HOST CITY**

In 2019, Visit Billings, the Billings Hotel and Convention Center, Billings' area lodging partners and the community will have the privilege of hosting thousands of members of the Marine Corp League (MCL). The MCL focuses on camaraderie and fellowship for the purpose of preserving traditions and the interests of the United State Marine Corp and those who have been honorably discharged. We are honored.

★ **NOW SHOWING** **CHECK IT OUT AT VISITBILLINGS.COM**

Find inspiration to take in all of the Billings area's top natural, cultural and adventurous attractions when you watch the newly released Visit Billings Inspirational Video. From the top of the Rimrocks, to the top of the Beartooth-Absarokee Mountains, experience Montana's Trailhead.

★ **NOW COMPLETE** **YELLOWSTONE KELLY INTERPRETIVE SITE**

Thanks to partnerships with the Billings Chamber of Commerce, City of Billings, Billings area lodging partners, cultural partners and the business community, residents and visitors alike can learn about the Yellowstone Kelly. This warrior and veteran is buried atop the Billings' Rimrocks. The area of his gravesite now offers points of interest and interpretation regarding the life of this scout.

★ **SUCCESSFUL YEAR ONE** **AMERICAN AIRLINES - DIRECT SERVICE BIL/DFW**

Strategic partnerships proved key in FY18 as Billings Logan Airport started offering direct, year-round, daily service to Dallas/Fort Worth. Focused advertising efforts in the Dallas market as well as in Billings, southeast Montana and northern Wyoming assisted with positive promotion of the direct service.

★ **SPORTS TOURISM GROWTH REALIZED FOR BILLINGS** **WELLS FARGO NAIA DI WOMEN'S BASKETBALL**

Billings will host this 32 team tournament in 2019 and 2020 thanks to community support. Year two of what now looks like a four year cycle, was a huge hit for Billings as a sports tourism destination, but also for the local business community. However, the most significant highlights were the Champions of Character and Youth Impact Day events which helped drive 2,900 area youth to experience the high caliber of competition at Rimrock Auto Arena.

Additional Highlights:

- ★ **NAIA Best New Host Award**
- ★ **Billings named the 2018 Readers' Choice Award Winner by *SportsEvents Magazine***
- ★ **Billings named 2017 Platinum Choice Meeting Destination by *Smart Meetings***



EXECUTIVE SUMMARY

In a world where destinations are focused on being relevant and remarkable, at every turn, with every tourism product, many times the quintessential means of connecting with the potential and active traveler becomes a secondary focus. As human beings we are inspired by emotion, passion, excitement, impressions and sensations.

Our senses are drawn to the reactions felt from the smell of the dirt at the rodeo, the feeling you get when you are on a trail surrounded by the sounds of birds chirping while scents of grass and trees float around you, the wind on our faces as we bike or jog down the path, the views achieved after reaching the top of the hill, the admiration realized when walking into the gallery of a powerful artist, the warm feeling from a sip of a handcrafted beverage, the adrenaline exerted while floating the river, the accomplishment of actually feeling the tug on the end of the fishing rod, the emotion that overcomes you when you watch the cowboy kneel down and pray before the ride. Inspiration leads to experience. Experience leads to living. Living leads to memories and tradition.

Tourism product development is directly related to offering places to go, meet and compete, but the authentic experience speaks to people

and that is what guides individuals in travel and builds a confidence in us to live life to the fullest. That's the power of travel and to Visit Billings and our tourism partners that is the power of traveling to Billings.

As Visit Billings continues to focus on the ten year vision, experience will be primary. In FY19, we will focus on the destination, the community, the people, the pride and the experience. It's about wellness, adventure, history, culture, nature and discovery.

From community pride efforts and customer service training, to working with strategic partners on tourism product development efforts, Visit Billings will look to the people and places that draw people to the region.

Research projects including general tourism projects, economic impact data, sports tourism expansion efforts and convention center development will help mold visioning strategies. Marketing and sales strategies will hone in on what we already know; people make places. At Visit Billings, we strive to host people to the best of experiences and we are the head of the trail to lead the way to new adventures in the great American west.



VISIT BILLINGS FUNDING

Visit Billings is funded primarily through the Billings Tourism Business Improvement District (BTBID) and through a portion of the State Lodging Facility Use Tax.

The BTBID assesses \$2.00 per occupied room night on all hotels and motels in the city of Billings with six (6) or more sleeping rooms. The BTBID funds stay local for promotion of tourism in and around Billings to support and grow business opportunities for the destination and its stakeholders.

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 and a 3% Lodging Facility Sales, for a combined 7% lodging tax. The Lodging Facility Sales Tax (3%) is deposited into the State's General Fund. The Lodging Facility Use Tax (4%) is allocated to the Department of Commerce for tourism promotion on the state and local levels including Montana's Tourism Regions and Convention and Visitors Bureaus (CVBs), like the Billings CVB.



STRENGTHS

ACCESSIBILITY TO UNSPOILED NATURE

- The most scenic entrance to **Yellowstone National Park** is via the **Beartooth Highway** which is a **National Scenic Byway and All-American Road**, 60 minutes from Billings
 - › **Red Lodge** – 60 miles
 - › **Beartooth Highway** – 65 miles
 - › **Absaroka-Beartooth Wilderness Mountains** – 60 miles
 - › **Yellowstone National Park** NE entrance at Cooke-City/Silver Gate (summer access via vehicle; winter access via snowmobile) – 140 miles
- The only physical evidence along the **Lewis and Clark Expedition** is located at **Pompeys Pillar National Monument**, 30 miles from Billings
- Native American Culture
 - › **Little Bighorn Battlefield National Monument** – 60 miles
 - › **Bighorn Canyon National Recreation Area** – 85 miles
 - › **Crow Fair** at Crow Agency (August) – 80 miles
 - › **Chief Plenty Coups State Park** – 35 miles
- Billings scenic and outdoor attractions
 - › Rare, sandstone **Rimrocks** define the city and offer an unexpected backdrop and vantage points of the horizon
 - › Walking, hiking and biking trails
 - › The longest free flowing river in the lower 48, **Yellowstone River**, runs just south of town
 - › **Four Dances Recreation Area** offers excellent access to **Bureau of Land Management** trails and scenic views

VIBRANT COMMUNITY APPEAL / ARTS & CULTURE

- Historic Downtown Billings and Montana's only **Walkable Brewery District**, which includes six breweries, two distilleries and a Cider House
- Museums serving contemporary to western tastes
 - › **Yellowstone Art Museum**
 - › **Western Heritage Center**
 - › **Yellowstone County Museum**
- Lively music, theater and nightlife scene - **Magic City Blues, Alberta Bair Theatre, Rimrock Auto Arena, and Cove Creek**
- Flavors of all kinds including farm-to-table offerings
- State-of-the-art library
- Shopping ranging from specialty boutiques to name brand retailers like Scheels at Shiloh Crossing

ACCOMMODATIONS & FACILITIES

- Nearly 5,000 hotel rooms in 55 different hotels ranging from brand name chains to local historic properties
- 360,000 square feet of flexible meeting space
- 10,000 seat Rimrock Auto Arena at MetraPark
- Numerous unique meeting settings including the Historic Billings Depot, Henry's Garage and Swift River Ranch
- Substantial development projects are underway in Billings regarding a Montana convention center development with Hammes Company as well as sports facility opportunities in south and west Billings

AIRPORT

- Billing Logan Airport serves ten (10) cities directly with major airlines Delta, United, American Airlines, Alaska and Allegiant
- Cape Air serves northeast Montana with several daily intrastate flights Airport located conveniently downtown
- **Non-stop** flights are offered daily, weekly and seasonally
 1. Seattle (daily)
 2. Portland (daily)
 3. Salt Lake City (daily)
 4. Denver (daily)
 5. Minneapolis/St. Paul (daily)
 6. Dallas/Fort Worth (daily)
 7. Las Vegas (weekly)
 8. Phoenix (weekly)
 9. Los Angeles (seasonal)
 10. Chicago (seasonal)





SPORTS DESTINATION

- Billings offers sports teams to delight and entertain visitors and locals
 - › **Billings Mustangs Baseball** - rookie affiliate team to the Cincinnati Reds plays home games June-Sept – Dehler Park
- Community wide events attract athletes from all over the country
 - › **Yellowstone Kelly Mountain Run**
 - › **Big Sky State Games** - region's largest Olympic style state games
 - › **Montana Marathon** (Boston Marathon qualifier)
 - › **Montana Women's Run**
 - › **Heart & Sole Run** (5k regional qualifier)
 - › **406 Duathlon Challenge**
 - › **Trailhead Trifecta**
 - › **Montana Warrior Run**
 - › **Big Sky Volleyfest**
 - › **Stockman Bank Magic City Soccer Classic**

- Sporting venues allow Billings to position itself as a contender in vying for tournaments and competitions
 - › **Revolution Sports Campus**
 - › Dehler Park \$12 million multi-use baseball stadium
 - › Amend Park soccer, lacrosse and cross country fields
 - › MetraPark Grounds including Rimrock Auto Arena
 - › Two universities, four high-schools with full sports facilities and two state-of-the-art middle schools
 - › Stewart Park Softball and Baseball Complex

STRONG ECONOMY & BUSINESS CLIMATE

- **Medical** - two nationally renowned hospitals including one Mayo Clinic Partner (Billings Clinic)
- Supportive local business climate
- Partnership with Chamber of Commerce, Big Sky Economic Development, Downtown Billings Alliance as well as City of Billings and Yellowstone County officials strengthens community ties
- Strong agricultural support for state and region
- Oil refineries (Exxon Mobil, Phillips66 & Cenex Harvest States)



OPPORTUNITIES



WYOMING TOURISM EFFORTS

- The Wyoming Office of Tourism, always a major competitor for Montana, is strategizing and investing in efforts to keep visitors en route to Yellowstone National Park through Wyoming. The Montana Office of Tourism and Business Development (MOTBD) invests millions of dollars annually in promoting Yellowstone National Park as a tourism pillar.
- Wyoming positions itself as “a more desirable entrance to Yellowstone National Park” via Cody and more scenic means of traveling the west from Mount Rushmore instead of taking the Warrior Trail in southeast Montana.
- Billings has the opportunity to own Yellowstone’s Most-Scenic Route via the Beartooth Highway, targeting the westbound drive markets and key fly markets through strategies that invite travel into southeast Montana to experience Little Bighorn Battlefield and Pompeys Pillar National Monument, the Warrior and Dinosaur Trails, or the most scenic route into Yellowstone National Park via the Beartooth Highway into the northeast entrance at Cooke City/Silvergate.

AIRPORT

- Billings Logan Airport, though offering consistent and strong air capacity, is perceived as not keeping pace with necessary and/or potential growth as compared to other Montana destinations. Billings has lost market share in the form of deplanements in recent years as competing Montana communities work hard to attract travelers. Billings Logan, together with community partners including Visit Billings and the Billings Chamber of Commerce, has strongly supported the newest direct flight from Dallas/Fort Worth with American Airlines. Such an opportunity, among other key direct flights including Minneapolis and Denver, allows Billings to compete and yield growth in the future. In the meantime, the City of Billings is working to invest in a major expansion of Billings Logan Airport.
- In many cases, airfare is higher than competitive cities. This can be considered a concern for Billings as a destination, particularly with the leisure, sports and conventions recruitment efforts. Billings

Logan statistics state that, on average, airfare into Billings fluctuates a few dollars higher or lower as compared to competitive Montana destinations, like Bozeman.

TOURISM PRODUCT DEVELOPMENT

- There is an ongoing perception or stigma, still, that there can be nothing to do in Billings. This is beginning to evolve, but the investment into brand lift to focus on the positives at Montana’s Trailhead are as important as ever in changing mindset. It’s important for stakeholders and business owners to realize the importance of community development. As quality of life improves in Billings and Yellowstone County, so will the offerings to potential visitors. This transformation will help with community pride efforts as well.

MEETINGS & CONVENTION FACILITIES

- Billings offers no state-of-the-art, structured, large-capacity convention center on a campus setting. Existing facilities are spread throughout the city and research has found some to be either dated or not in convenient locations, i.e. close proximity to shops, restaurants and points of interest.
- With Meeting and Convention business representing nearly a quarter of Billings’ tourism industry, a new convention center in any Montana city could steal significant market share from Billings.
- Multiple convention center development proposals have emerged this year. Having experienced resistance from industry partners, advocacy will be critical to supporting successful development of these needed facilities and growth of Billings meetings business.

COMPETITIVE SPORTS FACILITIES

- Billings is a strong sports destination with the potential to recruit significantly more youth, collegiate and amateur events if sports facility offerings were expanded.
- A feasibility study conducted by Victus Advisors was completed in 2018 and identifies a multi-court indoor facility, ice arena and competitive swim facility as Billings’ most needed facilities, in addition to existing field renovations such as lighting and turf.

WALKING EXPERIENCES/GATHERING AREAS

- Downtown Billings' outdoor shopping venues like Shiloh Crossing and the West Park Promenade are strengths, but there are few other offerings that encourage guests to explore town. In FY19, Billings will be branding and further promoting the Billings Brew Trail, the only walkable brewery district in Montana.
- Investments in the Billings trail system, including the Marathon Loop, are top priorities of the Chamber of Commerce's Trails Committee and Billings TrailNet. Both organizations have a robust volunteer base, while City and County support and strategies help strengthen walkability in Billings. The business community's investment into the Yellowstone Kelly Interpretive Site (YKIS) along Swords Rimrock Park is a prime example of local residents wanting to invest more into the community for quality of life and tourism impacts.

REGIONAL PARTNERSHIPS

- Known for "Big Sky Country" experiences, Montana ranks high on travel wish lists, however, the more urban experience of Billings, and that of Southeast Montana, varies from the wide-open and unobstructed "Big Sky" perceptions. Many people simply do not have the knowledge that Billings offers great adventure without the sacrifice of a downtown experience.
- To build awareness of Southeast Montana, Visit Billings will be establishing partnerships with companion frontier destinations and points east and southeast of Billings to target summer bucket-list travel including an unprecedented list of iconic American sites and attractions from Mount Rushmore to Little Bighorn for the "Great American Road Trip."

TRAIL GUIDES

- A brand is only as strong as the local people and businesses that live and breathe it every day. Through the Trail Guides program, we will empower these local businesses and key local influencers to be brand ambassadors and visitor resources once in Billings, essentially adding virtual visitor centers throughout Billings. Visitors to these

establishments can ask for recommendations on places to go and things to do, as well as have access to maps and other literature to help them get the most out of their Billings experience.

- Participating businesses and locations will showcase a Trail Guide decal on their storefront, letting locals and visitors know that they are a resource for everything tourism and experience related in Billings.
- Additionally, we'll have the opportunity to do a series of Trail Guide social takeovers, allowing visitors to get a personal, behind-the-scenes look at the people and places that make up the unique Billings travel experience.

CULINARY

- Billings' food scene is as unique and diverse as its travel experience. Branding the Billings culinary experience, Trailhead Gourmet, allows us to not only package and promote our style of cuisine in a unique way, but also represents the wide range of culinary offerings, from diners to James Beard recognized chefs, found throughout Billings.
- By branding Billings' culinary scene, we also open up partnership opportunities with food bloggers, writers, food programmers, as well as influencers.

HISTORY & WESTERN HERITAGE

- With historic people, experiences and destinations like Little Bighorn Battlefield National Monument Pompey's Pillar National Monument and the Yellowstone Kelly Interpretive Site, Billings is the centerpiece to a powerful western history and heritage experience. There is an opportunity to package and develop these stories and attractions into a richer and more engaging tourism product.
- There's also an opportunity to make this history and heritage more relevant in today's social conversations by having a local legend like Yellowstone Kelly take over the Visit Billings social channels. How would he view the world? Where would he go to eat? What would he do if he were alive and in Billings today?



CHALLENGES

OIL, GAS & COAL

- The regional leisure tourism segment benefits from the oil, gas and coal workforce in eastern Montana and northern Wyoming. The current oil, gas and coal production slump has impacted Billings as a tourism destination. Regional visitors who would typically be traveling to Billings for entertainment and shopping, which equates to room nights, are instead staying close to home.

COMMUNITY PRIDE

- Billings locals often direct visitors outward, whether to nearby Bozeman, Red Lodge or surrounding regional attractions, giving the perception that there isn't anything to do worthwhile inside of Billings. Community pride is a major component to a successful campaign and drive in visitation – pride starts within.

SMALL TOWN DESIGNATION

- Billings is a vibrant community and the largest in the state, however, it is not small and charming per the MOTBD brand pillars. Gaining Montana Tourism brand support as a viable destination in the region is an ongoing challenge for Visit Billings and its stakeholders.

ARRIVAL EXPERIENCE

- Entering Billings via Interstate 90 is especially dreary at nearly half of the city's exits – with sprawling and visible refineries and industrial activities. The Billings Logan Airport arrival experience is strong for visitors traveling by air, but the aesthetics via the I-90 corridor aren't

as inviting nor welcoming. The exits need improvement in some cases, like berms, wayfinding signage and landscaping that can be more appealing and enticing for visitors contemplating a stopover.

GROUND TRANSPORTATION

- With the addition of Uber in the Billings market, ground transportation has substantially improved. However, taxicab services continue to be inconsistent regarding availability and often times are offered in a shuttle format, meaning a rider may share the cab with other riders taking longer to get to a store, restaurant or attraction. There is typically not a price break in this group ride scenario. There is room for improvement in this transportation offering to Billings, but the burden lies with individual businesses.

CANADIAN EXCHANGE RATE

- Ongoing flux in the Canadian exchange rate directly impacts the viability of this market.

HOMELESS POPULATION

- Billings has strong programs and services for the homeless community through Montana Rescue Mission among other organizations, however, the existence of these programs impacts a noticeable homeless population as other communities in Montana rely on Billings for these programs. The visible presence of homelessness can impact a visitor's first impression and is a topic that exists in travel reviews and online forums.



MOTBD BRAND PILLAR ALIGNMENT

Visit Billings is committed to keeping the Montana Office of Tourism and Business Development's (MOTBD) key brand pillars front-of-mind in all marketing efforts to present a holistic Montana experience to visitors. There are many ways the MOTBD plan speaks to Billings as a destination. In other instances, Billings will seek to position itself as a valuable contributor to the state's tourism efforts as some elements of the MOTBD strategy are difficult to adorn onto Montana's largest city. As Montana's largest and most urban community, it can be difficult for Visit Billings to 'fit' Billings into the MOTBD mindset at all times.



STRATEGY 1

COMMUNICATE AND DELIVER MONTANA'S SPECTACULAR UNSPOILED NATURE IN A WAY THAT MAKES IT REAL, TANGIBLE AND ACCESSIBLE TO THE VISITOR.

The Montana "Big Sky" experience ranks high as a wish list destination, but a significant gap exists among those who desire to visit and those who actually travel to Montana, likely due to perceived challenges with accessibility, cost and, perhaps, those who find the desired wilderness experience intimidating. People seek adventure and unspoiled nature, but a majority of travelers also prefer to have the creature comforts of civilization and hospitality. New FY19 creative messaging will focus on Billings proximity to the surrounding unspoiled nature without sacrificing the modern hospitality travelers appreciate.

Positioned as Montana's Trailhead, drive one hour in any direction from Billings and you're offered access to iconic attractions like Pompeys Pillar, Bighorn Canyon, Little Bighorn Battlefield and Beartooth Highway. From Billings, visitors can see six mountain ranges – the Bighorns, Pryors, Beartooths, Crazyes, Big Snowies and Bull Mountains.

Billings pairs these recognized "Big Sky" attractions with modern hotel amenities, great brunch spots, the Billings Brew Trail, attractions and dozens of multi-use trails and bike lines, all framed by its own remarkable sandstone Rimrocks and the Yellowstone River.

STRATEGY 2

HIGHLIGHT AND HELP DEVELOP VIBRANT AND CHARMING SMALL TOWNS THROUGHOUT MONTANA.

Billings may boast big city amenities, but it does offer a truly small town feel. Billings offers travelers a destination for shopping, nightlife, dining, accommodations and culture – on the edge of the genuine frontier and near small-town Montana. As the largest community between Calgary and Denver, Spokane and Minneapolis, Billings is a vibrant community with access to small towns via Visit Southeast Montana and Yellowstone Country.

Equally as important to the visitor, the frontier character of its warm and hardworking people is uniquely Montanan and inherently individual. FY19 marketing initiatives will employ Billings locals as its Trail Guides, inviting visitors to participate in the culture and spirit of the destination and its people, whether connecting with local artists and artisans, discovering historical relevance through the perspective of Yellowstone Kelly, or simply locating the "locals favorite" trails and burger spots.

STRATEGY 3

INTEGRATE NATURE AND TOWNS TO OFFER AND DELIVER A BALANCE OF "BREATHTAKING EXPERIENCES" AND "RELAXING HOSPITALITY."

Whether visitors seek adrenaline pumping adventure or easy paced experiences, Billings is the perfect place to set up home base. With nearly 5,000 hotel rooms, a wide variety of local attractions, and access to breathtaking views and Montana icons, Billings will surprise and delight visitors from all walks of life.

An aerial photograph of a wide river valley at dusk. The sky is a mix of deep blue and purple, with some light clouds. The river flows through the center, surrounded by green fields and some buildings. The foreground shows a rocky bank on the left. A semi-transparent blue overlay covers the top half of the image, and the title text is centered in white.

TRAVEL DECISION PROCESS

THREE PHASES: INSPIRE, ORIENT, FACILITATE

According to the current Montana Tourism and Recreation Strategic Plan, the best way to consider how the potential traveler considers and contemplates trip planning and execution of an itinerary is as follows:

THE PROCESS IS DEFINED BY USE OF THE FOLLOWING TERMINOLOGY AND CORRESPONDING DEFINITIONS:

INSPIRATION – *The process of being mentally stimulated to do or feel something, especially to do something creative.*

ORIENTATION – *The relative physical position or direction of something.*

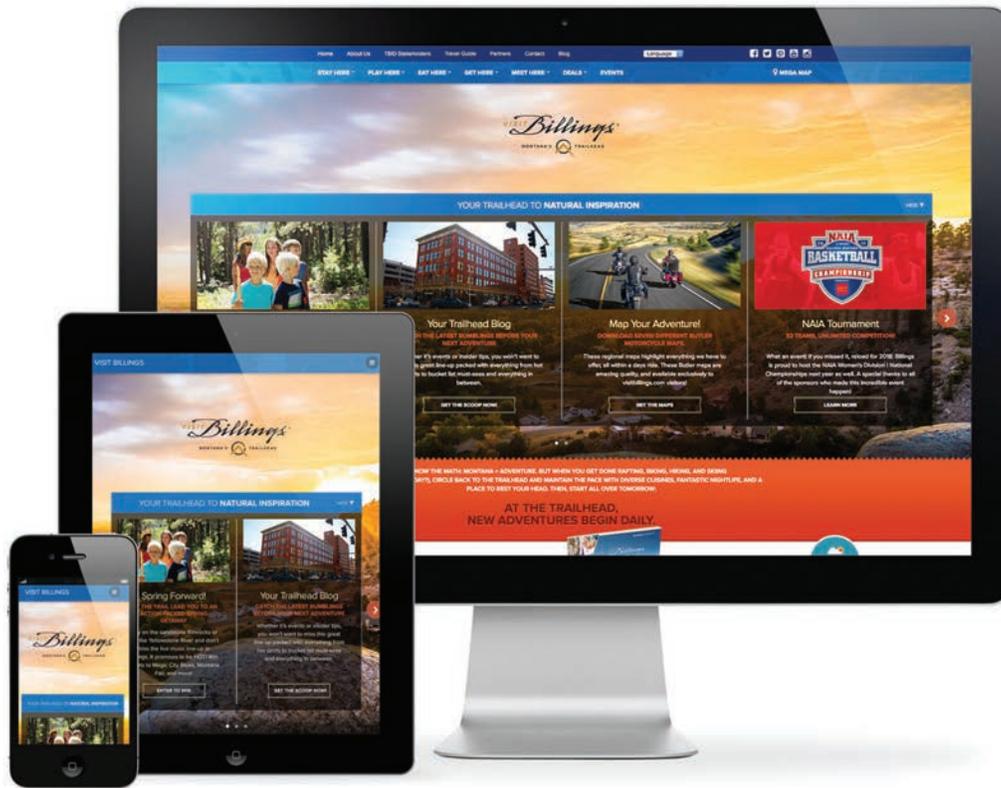
FACILITATION – *The action of facilitating something to make it easy or easier.*

THE INSPIRATION PHASE is where the traveler is made aware of the general product and develops a desire to visit the destination. The Montana Office of Tourism and Business Development (MOTBD) is responsible for the foundation of this marketing mindset via Montana's brand image, per the strategic plan. MOTBD markets Montana's key tourism pillars to inspire potential visitors to the state with inspirational imagery and copy. MOTBD focuses strategies on Yellowstone and Glacier National Parks as well as mountain adventures. Therefore, in the inspirational phase, Billings must strategize to position our destination as a viable city to include on one's itinerary.

- Billings is well situated between the historic landmarks of southeast Montana and the awe-inspiring landscapes of Yellowstone Country. Working to compliment MOTBD efforts, Visit Billings will continue to leverage stunning imagery, targeted messaging and compelling calls to action in marketing materials.
- Billings boasts access to the Beartooth Highway which Charles Kuralt called "the most beautiful drive in America." As a destination, Billings offers stunning vistas via the sandstone Rimrocks and access to the Yellowstone River, all reasons to choose southeastern Montana as part of one's route. Wyoming's state tourism office strategizes to keep the drive market in Wyoming by enticing travelers making 'on the road decisions' to access Yellowstone National Park via Cody. Visit Billings hopes to work closely with MOTBD in the future to help ensure potential travelers are inspired to make eastern Montana part of their travels for incredible adventures and ease of access to landmarks and experiences beyond the MOTBD brand pillars.
- Regionally, Billings itself offers a vacation destination to many neighboring communities. Ongoing "weekender" campaigns will inspire and invite the driving audience to explore and enjoy all Billings has to offer in entertainment, outdoor activities, cultural and historic interests and recreation.

THE ORIENTATION PHASE is where the traveler begins researching the details of his or her trip. This phase focuses on the route the traveler will take to arrive at the chosen destination and the mode of transportation used to get there. Per the strategic plan, Montana's visitors have multiple destinations to consider within the state and bordering states. Regions and CVBs provide tools to help the visitor plan a route and encourage a longer stay.

- Visit Billings marketing initiatives direct prospective travelers to a comprehensive website at VisitBillings.com. The site is maintained regularly and provides in-depth information, maps, guides, suggested itineraries and must-sees in Billings and the area. In FY19, Visit Billings will be incorporating new campaign content with enhancements in website user experience allowing prospective visitors to explore travel plans by interest, by interest, also providing another data source for optimizing marketing efforts.
- "Get Here" page content continues to highlight direct flights with United and Delta as well as American Airlines' expansion into the Billings' market with a daily, direct flight between Dallas/Fort Worth (DFW) and Billings Logan (BIL). The page also includes stay and fly rates offered to regional residents driving to Billings for air service. Cape Air is an important partner in the regional leisure market serving smaller eastern Montana communities where residents may choose to fly to Billings in order to shop, schedule use of services and enjoy entertainment and activities.
- In FY19 Visit Billings will be branding and marketing its Billings Brew Trail and Trailhead Gourmet culinary experiences.
- The Billings Guidebook is available digitally via the website and is mailed at no-charge upon request. The Visit Billings team is committed to responding to web and phone inquiries promptly.



THE FACILITATION PHASE is where the traveler seeks experiences en route to a destination and during a stay.

- Tourism Regions, Convention and Visitors Bureaus (CVBs), communities and organizations must all work together to make visitors aware of the full array of experiences available to guests.
- The Billings Visitor Information Center (VIC) is managed by Visit Billings and housed on the main floor of the Billings Chamber of Commerce office one mile from the Interstate 90 corridor. Nearly 30 part-time volunteers operate the center, which is open Monday through Friday from 8:30 a.m. to 5:00 p.m., with expanded hours on some high-season weekends. The VIC is complete with brochures, maps, guides and retail offerings. The Visit Billings and Chamber teams are knowledgeable, welcoming and on-the-ready in order to facilitate visitor queries. The goal is to foster successful stays and future Montana travels.
- The Visit Billings staff keeps an open dialogue of communication and information flow with tourism partners, area hotels, attractions, businesses and the community in preparation to provide exceptional customer service to expected visitors. This service initiative is spearheaded by the Trailhead Tourism Ambassador (TTA) Program. The TTA mission is to unite and motivate the Billings community in raising the bar and level of service. It provides frontline employees training and support regarding options for visitors in and around Billings and southeast Montana.

- In FY19, Visit Billings will be evolving the TTA Program to include Billings Trail Guides, empowering local businesses and key local influencers to be brand ambassadors, further enhancing the visitor experience.
- Visit Billings continues to foster connectivity within different social media platforms by offering visitors current and relevant content via Facebook, Instagram, Pinterest, Twitter and YouTube. Visitors are invited to engage with the #VisitBillings brand throughout their journey.





MARKETING STRATEGY

“FORGE YOUR OWN PATH” BRAND EVOLUTION

Onward pioneers. Today is ours for the taking. And tomorrow too. For we have a vision of something better. Of mightier things to come. New ideas. New inventions. New innovations. The likes of which the world has never seen. Let's forge our own path. Blaze new trails. Find new frontiers. Be guided by the greatness that lies ahead. Let's stoke the fire of the pioneer spirit. Call home to a place we've only seen in dreams. Big skies and big things. This is freedom. A city without limits. Born in the shadows of the Rimrocks. Fed on the water of the Yellowstone River. Descendants of the West's greatest heroes. This is Montana's Trailhead. This is only the beginning. Forge your own path. Billings. Montana's Trailhead.

Leveraging Montana's Trailhead, Visit Billings will be launching “Forge Your Own Path,” an evolution of the Visit Billings brand promise, inviting visitors to be their own pioneers and start their own unique and memorable journey, authentic to the Big Sky Montana experience yet approachable and unexpected. “Forge Your Own Path” is built on the pioneer spirit of Billings' culture and its people, from Yellowstone Kelly and William Clark (of Lewis and Clark) to today's makers, innovators, adventurers and artists, representing the strong will, Western humility and the self-made perseverance that embodies the Billings way of life.

Visit Billings will differentiate itself from the competitive set by bringing the Billings experience to life through the lens of its brand essence, the spirit at the core of the destination. Typical tourism campaigns feature big scenery and “people doing stuff,” whether drinking a craft beer, hiking or shopping. Visit Billings will stand not only for its products and nearby bucket-list attractions, but its authentic, accessible character.

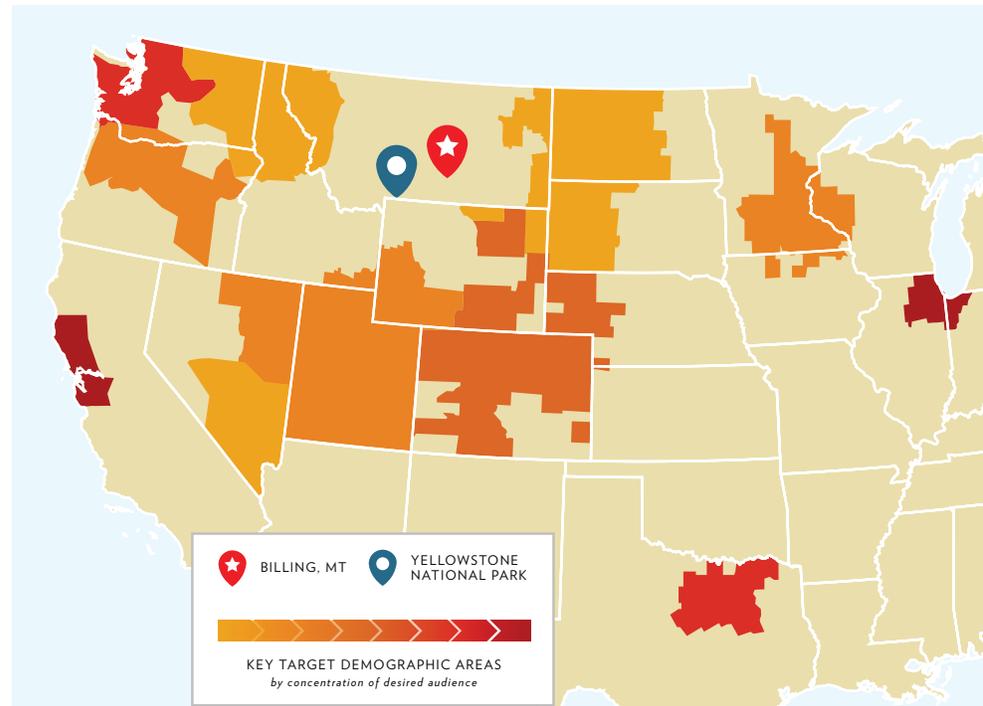
MARKETING BEGINS AT HOME

As it's currently positioned and marketed, Montana's Trailhead directs visitors outward, away from Billings. This directly plays into the overall perception of a lack of things to do, events, entertainment and family activities within city limits. From initial on-the-ground research, this was also the case when engaging with the local community and business owners. More often than not, we were directed outside of Billings when seeking unique travel experiences. Community pride is a major component of a successful brand and its campaign efforts to drive visitation. It's imperative that we continue to evolve the ambassador program, introduce new initiatives like the Billings Trail Guides, increase stakeholder engagement, and utilize local partnerships to instill pride and ownership of Billings.



SUMMER STRATEGY

Visit Billings will focus heavily on behavioral targeting around summer vacation planning and booking, with interest in outdoors, national parks and western heritage experiences. Based on recent visitor profile research, Visit Billings will target adult travelers 25-54 with an annual household income of \$75,000 to \$150,000.



SUMMER LEISURE STRATEGY AND CREATIVE MESSAGING

Summer season strategy will establish ownership of the most scenic route to Yellowstone National Park via Beartooth Highway. Branded as “Billings Yellowstone’s Scenic Route,” messaging will focus on Billings proximity to the surrounding unspoiled nature without sacrificing hospitality, hotel accommodations, great brunch spots and walkable brewery trails, western heritage sites, and even guaranteed opportunities to see and appreciate native animals up close at Montana’s only zoo.

Partnerships will be developed in FY19 with companion frontier destinations to target summer bucket-list travel including an unprecedented list of iconic American sites and attractions from Mount Rushmore to Little Bighorn Battlefield for the “Great American Road Trip.”

While family remains an important summer demographic, especially in targeting growth of older Millennial families, the current visitor profile indicates that a majority visitors to Billings are traveling without children. Ranked alongside Bryce Canyon and Glacier National Park, among others, Yellowstone is a bucket list family attraction with nearly 4 million annual visitors. In growing awareness of Billings’ proximity to the national park, as well as western heritage sites such as Pompey’s Pillar and Little Bighorn Battlefield National Monuments, Visit Billings will target road warrior families seeking epic summer vacation memories. According to Mintel’s Outdoor Enthusiasts, US - March 2017 report, 6 in 10 fathers say they are

very enthusiastic about the outdoors, compared to slightly more than one third of all adults. Younger men are more likely than women to participate in active outdoor activities, an opportunity to engage with fathers. Creative messaging and media targeting will balance growth of families traveling with children with an equally outsized target of outdoor enthusiasts traveling as couples or as groups of friends.

To maximize budget, national marketing initiatives will focus on 2-3 key geographic markets with the highest potential for ROI, ensuring a minimum reach and frequency to truly make an impact. Visit Billings and BCF conducted a thorough market analysis to determine the top markets most effective for summer visitation growth, especially for new visitors. This analysis includes factors such as proximity and accessibility (drive time, flight convenience and cost), population within target demographics, web visitation and analytics and travel behavior data among other variables.

The following map positions key target geographic areas, primarily top national feeder markets and DMAs with direct flights, based on demographic and behavioral considerations indicative of travelers seeking a destination experience that aligns with that of Billings, MT. Areas shaded in darker red and orange indicate larger concentrations of desired travel behavior. This includes variables such as DMA population who has spent over \$3,000 on domestic travel, taken 3+ domestic non-business trips or visited a National Park within the last 12 months. (resource: Esri ArcGIS 2010 U.S. Census data)

POTENTIAL OUT-OF-STATE MARKETS FOR SUMMER TARGETING:

DENVER, CO DMA

With a population of over 1.6M ages 25-54, Denver ranks highest in travel behavior that aligns with Billings' destination experience. The "Mile High City" skews high for nature enthusiasts with an active, outdoor lifestyle. Located about 550 miles Southeast of Billings, Denver has affordable daily non-stop flights and is within drive proximity at about an 8-hour trip. The market ranks as the primary feeder market in preliminary visitor profile data, and fifth in unique website visitation to VisitBillings.com

MINNEAPOLIS/ST. PAUL, MN DMA

Another large feeder market with daily non-stop flights to Billings, Minneapolis is about 840 miles South/Southeast of Billings, about a 12 hour drive or short two-hour flight. This prime target market sits at an ideal location for the "All American Road Trip." The target population age 25-54 is about 1.7M and skews high for frequent travelers who participate in sightseeing while on domestic vacation.

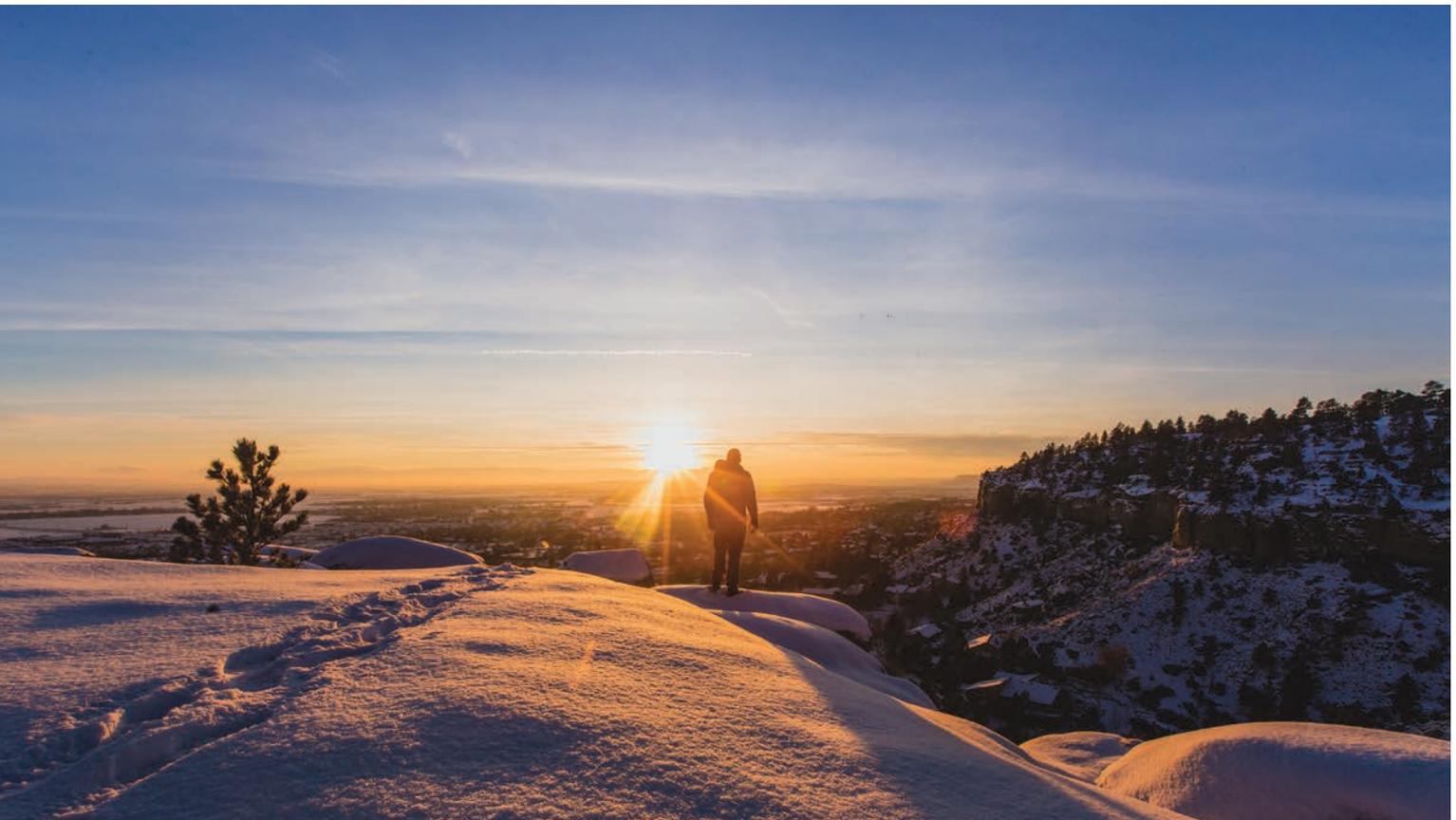
DALLAS-FT. WORTH, TX DMA

As the newest daily direct flight to Billings, recent promotional partnerships have seen growth in this feeder market. Located over 1,300 miles from Billings, visitation will be dependent on affordable and convenient non-stop flight service. The Dallas population of ages 25-54 is over 2.9M and, of Billings target markets, it has one of the largest populations of frequent domestic travelers and those who have visited a state park. The market ranks high in unique website visitation to VisitBillings.com, in part due to recent promotional efforts.

SALT LAKE CITY, UT DMA

Ranking second highest in unique website visits to VisitBillings.com, Salt Lake City is under a nine-hour drive from Billings or a quick one-hour non-stop flight; however, its location southwest of Billings may inhibit opportunities to target summer visitation around Yellowstone National Park. Salt Lake City's population age 25-54 sits just under 1.1M. A prime target for outdoor enthusiasts and nature lovers, Salt Lake City itself is surrounded by five of Utah's own national parks.





MARKETING TACTICS

PAID MEDIA

To establish a minimum of 10-25% reach of Billings' target audience in its primary geographic markets with highest opportunity for ROI, media will layer in placements that have the opportunity to deliver the greatest targeted, cost-efficient reach, such as out-of-home and select print with digital focused primarily social and short form video. Media selection will also be cognizant of the media characteristics of particular markets as well as the target audience. Specific markets may present opportunities to utilize radio and television to enhance reach and recall, whether broadcast or streaming, and over-the-top television. This is supported by Mintel's Outdoor Enthusiasts, US - March 2017 report which states 33% of outdoor enthusiasts said they look to TV programming to stay informed about outdoor activities they enjoy. While 38% of outdoor enthusiasts have used an online source to stay informed about outdoor activities and 25% use print magazines.

Exposure to media on multiple channels will be key in driving awareness, purchase intent, and executing digital simultaneously with traditional offline media will drive to greater lift. In addition, brand collaboration and sponsorship opportunities will further engage summer vacationers and outdoor enthusiasts with predisposition to visit national parks and western heritage experiences.

OUT-OF-HOME

Traditionally one of the lowest cost per thousand in impressions, billboards provide an efficient medium for brand awareness. While strategically placed highway billboards in Wyoming and South Dakota continue to encourage travel along Warrior Trail 212, less traditional out-of-home placements will be evaluated in select target markets.

FACEBOOK AND INSTAGRAM

With social's strong influence on travel decisions, Facebook has an outsized audience with robust targeting capabilities and creative units to utilize in bringing the Billings' Yellowstone Scenic route to life. Instagram continues to hold a primary role in travel inspiration. Placement targeted to in-feed, utilizing standard and/or carousel sponsored ads to drive website traffic and conversions, Canvas ad units to increase brand engagement and lead generation to grow the database, all layered with targeting such as demographic, geographic, interest, behavioral and/or look-a-like and lead generation.

With escalating concerns around privacy and abuse of user data, paid social will be closely monitored and evaluated against alternate digital targeting.

TRIPADVISOR

Online review sites remain a primary resource for travel research prior to booking. TripAdvisor is the leading travel research site and Visit Billings' plans to continue its Tourism Sponsorship contract. In addition to unique Billings destination content, placements may include digital display on desktop, tablet and mobile targeting Montana, Wyoming, North Dakota, South Dakota and Canada, competitive content and TripAdvisor's Audience Extension retargeting.

TELEVISION

TV continues to be one of the most effective and recalled media channels, in combination with good advertising creative, but it is expensive. Connected, or Over-the-Top (OTT) television through Hulu or Premion, is viewed through an internet connection accessed on a TV, tablet, phone or computer through a platform such as Roku, Xbox or Amazon Fire Stick (among others). In honing in on a top ROI market, there may be opportunity to strategically utilize traditional TV and/or OTT.

BRAND PARTNERSHIPS

Throughout the developing media plan for FY 2018-2019, Visit Billings will seek and evaluate partnerships with brands, influencers, products and events that align with Visit Billings' brand promise. A successful partnership will elevate the destination among its target interests of outdoors, national parks and western heritage.

VIDEO AND AUGMENTED REALITY

The scale has tipped in favor of mobile device for online travel research, and video is a convenient and digestible user experience. Whether user-generated content or destination advertising, short-form video is critical to capturing the six to seven seconds of attention needed to inspire someone to consider Billings, MT. Visit Billings will be considering technology components available through augmented reality to introduce video into more traditional placements such as out-of-home or print.



REGIONAL TARGET FOR ANNUAL GROWTH YEAR ROUND

Regional focus will remain on target markets with higher awareness and familiarity of Billings. These include markets within 350 miles, primarily in-state as well as Wyoming and South Dakota. For leisure travel, these close-in drive markets have a higher propensity to visit year-round for events, outdoor activities and nearby skiing in the winter, and short getaways for shopping and dining in Montana's biggest city. In some cases, travel may align with extending a necessity visit (ex. doctor's appointment) overnight to include leisure activities.

Creative messaging will focus around "things to do," consistently providing potential visitors new reasons to travel to Billings and establishing a sense of urgency around booking for special seasonal features, such as opening of Beartooth Highway or holiday family ski retreats. Primarily promoted through digital targeting, these travel drivers will be communicated through the brand lens of "Forge Your Own Path." A content calendar will outline key travel driving events, activities and attractions by season, and map out markets and allocated budgets throughout the year.

A leisure win this past year was when visitors showed increased enthusiasm in learning more about winter activities at Montana's Trailhead. This past year's winter campaign focused on why you should make Billings a destination on a snow day. The messaging focused on gearing up and getaway to Billings for snow shoes and warm brews.

Regionally, our digital display ads for our fall, holiday and winter campaigns saw CTRs between 0.04% - 1.19%. The Brandpoint listicle drove 645 visitors in a very steady stream over the course of the winter campaign - 45% of all referral traffic. The new microsite was introduced in 2016-17 to help position Billings as a viable and competitive winter tourism destination in Montana. Campaign efforts on both a regional

and national level directed to this site. These efforts were continued to be reinforced throughout FY18 resulting in an increase of 24% unique pageviews and increase of 5.9% average time on site. Our efforts will continue in FY19 with website updates and potential focus on SEO.

Brand partnerships, Facebook Canvas ads and programmatic digital will present opportunities to brand and showcase product differentiators. In FY 2018-2019, Visit Billings will brand and own these differentiators such as Billings' Brew Trail, the only Walkable Brewery District in Montana, as well as the destination's authentic culinary experiences from award-winning burgers to James Beard recognized chefs.



★ MARKET TRENDS

AUGMENTED AND VIRTUAL REALITY

While augmented reality (AR) and virtual reality (VR) technology has only begun trending in the travel industry, there are destinations that are becoming early adopters of this technology and using it as a part of their marketing programs.

Per Mintel Trend Alternative Realities, AR and VR technologies are helping people interact, play and explore in virtual spaces. This trend has not yet been completely embraced by the outdoor community, as only one in ten outdoor enthusiasts want to use it to explore places they have not yet traveled to, however, it could shape the way outdoor enthusiasts navigate and explore unfamiliar territory.

According to Travel Weekly, several companies within the travel industry are offering apps that feature AR functionality, such as mTrip Mobile Solutions and CN2. The Collette Compass app, developed by mTrip, includes things like trip journals, itineraries and offline destination

information content. Collette's clients have also noted enjoying the app's AR functionality to explore and experience local cultures.

CN2 developed Visit Orlando's app, which includes an AR functionality component with map overlays pointing out nearby attractions, dining, etc. The app also includes artificial intelligence (AI) capabilities, combined with AR, putting Visit Orlando's app in a unique space, providing an added, unexpected twist to a visitor's vacation experience.

According to Travel Weekly, while VR is currently more widely used, it is predicted to take two to three years for adoption of AR to hit critical mass for travel purposes. This, among the fact that a few travel destinations are already early adopters of this technology, confirms this is the time to truly begin the discussion of AR/VR within the travel space.



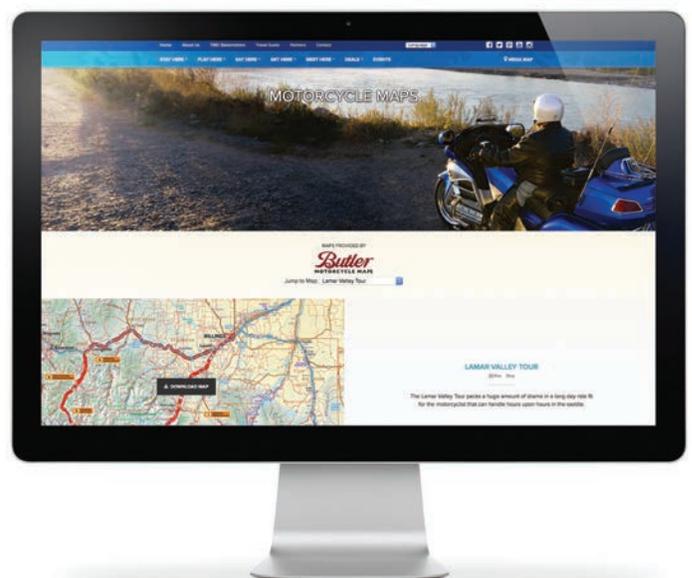
TWO/FOUR WHEELED MARKET

The two and four wheeled market is lucrative for the Billings region, with the Beartooth Highway, voted by AMA Magazine as the #1 Motorcycling Road in America, just 60 miles away. FY17 saw the completion of the Gold Wing Road Riders Association Wing Ding event with targeted recruitment to these riders.

The target audience is men and women motorcycle enthusiasts 35-64 residing in the United States – on any model bike, in any model vehicle. Specifically talking to the two-wheeled group, Harley riders are generally mid-40s to early 50s. Honda Gold Wing riders can skew toward mature riders with time to tour. BMW riders can range into their 80s.

Motorcycle riders in this area enjoy touring vacations, driving long distances and “experiencing” the journey. Women riders typically stop more often, visiting, shopping and relaxing in cities.

Visit Billings has partnered with Butler Motorcycle Maps to offer a variety of detailed tour options in order to ensure all motorcyclists enjoy the best ride experience into and out of Billings and the region.





INTERNATIONAL

International marketing will continue to grow with emphasis on the German and Asian markets. FY18 saw continued partnership with Brand USA.

Visit Billings staff will again work to host opportunities like workshops that will help stakeholders and tourism partners best host international visitors. Such education and promotional programs can help identify the role of Montana's Trailhead in international leisure market expansion. The development of Billings Trail Guide program, an evolution of the current Trailhead Tourism Ambassador program, will expand beyond hotel frontline employees and help gain traction for the tourism industry and assist the destination in offering first class hospitality as a whole, particularly for international visitors.

Canada remains a viable international market for Billings, particularly during spring/summer when driving conditions permit safe, long distance travel. Creative aimed at capturing travelers en-route to Yellowstone National Park is leveraged for this market. As the exchange rate continues to fluctuate, so does the viability of this market.

Visit Billings will continue to research the international landscape for other viable markets and will seek opportunities to market our destination in partnership with other strong voices like Brand USA and the MOTBD. Additionally, group travel is significant for the international market and efforts in this area continue to grow.



GROUP TOUR

Yellowstone National Park and Little Bighorn Battlefield, along with the Lewis and Clark Trail, in which Billings plays a major role, are key attractions positioning Billings as a trailhead to access popular tourism sites from a reliable and group-friendly destination. Billings offers tour operators 55 hotels to choose from (5,000 sleeping rooms) along with more than 300 restaurants, the historic Walkable Brewery District, strong retail offerings, museums, historical and cultural attractions, as well as adventure and recreational opportunities – all items that can assist with building an exciting and adventurous custom itinerary for groups of all sizes.

Billings continues to rival its competitive-set cities for adventure, access, and experience. Billings' proximity to Beartooth Highway, a consistently top ranked scenic drive in North America, and into the northeast entrance to Yellowstone National Park at Cooke City/Silver

Gate is a major asset to the Billings tourism industry and the group tour market. Visit Billings appreciates its relationship with the Red Lodge business community and town leaders as we work to attract groups in partnership with Visit Southeast Montana.

The incubation period in generating successful leads in the group travel market spans a multi-year strategy where tour operators begin booking new itineraries 12-36 months ahead of tour schedule execution. Visit Billings staff will focus on marketing Billings as a preferred travel destination in the group tour market on national and international platforms to begin the process of consideration. Individual geographic segments will be researched and marketed in a variety of ways as well in order to compete in this expanding tourism segment.



MEETINGS AND CONVENTIONS



Within a highly competitive marketplace, meeting and convention sales are a top priority for Visit Billings. Meetings business grows year-round visitation, especially in the shoulder seasons. Relationships with meeting and event professionals are key to the future of this segment, along with quality properties, state-of-the-art facilities and attractions that create excitement about the destination and its brand. Billings is a strong meeting and convention destination with non-stop air service to nearly two dozen major cities, 360,000 sq. ft. of flexible meeting space and 5,000 hotel rooms. With multiple proposed development projects under review, Visit Billings will continue to advocate for a new large-scale convention center as well as surrounding, walkable multi-use and entertainment products. Partnering and supporting the Hammes Company and the region's One Big Sky District development efforts will help align this segment for growth as part of the Visit Billings 2027 vision.

Visit Billings will focus on small market meetings and major city-wide convention business that benefits convention properties and multiple hotels. Such growth in this segment will result in continued progress in hotel occupancy, average daily rate (ADR), and impact the local economy by filling restaurants, retailers and attractions. This also supports the workforce and, to some extent, the area's tax base.

Sales and marketing initiatives will be aimed toward planners and decision makers of small market meetings, those with 400 attendees or less, utilizing three or more hotels with approximately 400 peak room nights and between 8,000 and 20,000 square feet of meeting space.

Planners are concerned about having state-of-the-art venues that support high attendance at meetings. They also desire destinations with attributes they believe their delegates will value. Multitaskers who want all destination information at their fingertips, planners also seek to build relationships with a destination. There is an emphasized focus on the experience beyond the four walls of the meeting room, and sales efforts will highlight that experience for Billings.

Targeted industries include two and/or four-wheeled, energy, agriculture, religious, corporate, military, trails, cycling, outdoor/recreation, healthcare, non-profit and professional and trade associations. Billings' amenities and access to surrounding bucket list attractions elevate its position with city-wide convention groups like BMW MOA, Gold Wing, Corvette, Mustang and Harley. Record attendance and success for previously hosted rallies position Billings well for future city-wide bookings in the two and four wheel markets and beyond.

SPORTS

As a leading regional destination in the sports market, Billings offers a wide range of venues accommodating several sports categories. The current sports facilities, coupled with strong air service options and proximity to national attractions position Billings strongly in this growing tourism segment. Team-friendly restaurants, local attractions, affordability and competitive room rates make Billings an ideal sports hub for youth, high school, collegiate, and amateur athletic events.

A highly competitive segment, sports event travel includes not only the athletes, coaches, officials and trainers, but also parents and family members. This supportive group comes to play a loyal role, but seeks experiences outside of a tournament bracket. At the same time, there are athletes, professional and amateur, who make Montana part of their itineraries to hike, raft and climb as well as experience fishing, hunting and birding.

In March 2018, Billings welcomed its second year of the NAIA Division I Women's Basketball National Championships with 32 teams competing in 31 games in six days at Rimrock Auto Arena. Billings will be host community to Montana State University Billings' Athletics as the destination for the 2018 and 2020 NCAA DII West Region Cross Country Championships which aligns the city well for a future bid effort regarding the national championship. Visit Billings also looks forward to assisting MSU Billings Athletics with the 2019 GNAC Softball Championship.

For a sports event planner, one of the most important decision factors in selecting a destination is its track record of hosting similar events. Destinations with a clear track record prove their ability to accommodate venue and hotel needs, and in the event planner's mind will be easier to work with. Visit Billings currently targets sports planners, tournament directors and sports industry decision

makers representing competitive events such as volleyball, lacrosse, soccer, softball, basketball and cross country to include amateur, K-12 and collegiate competition. Primarily, a regional scope to include Montana, Regional, Northwest, Pacific Northwest and Midwest conferences and associations.

As the sports travel segment continues to grow in Billings, it's necessary for the stakeholders, the community and Visit Billings as a DMO to have a better understanding of the opportunities available. As the sports travel segment continues to grow in Billings, it's necessary for the stakeholders, the community and Visit Billings as a DMO to have a better understanding of the opportunities available to recruit new, and expand existing, sporting events. In FY18, Visit Billings partnered with regional stakeholders to conduct a sports facility feasibility study. Results of the independent analysis identify a need for several facilities including a multi-court indoor facility, ice arena (two sheets of ice would be ideal), and competitive swimming facility, as well as lighting, turf and field improvements to existing facilities. For Visit Billings, it's time to look at executing long term strategic planning for sports tourism sales and marketing, take steps to organize a community sports committee and create a position at Visit Billings that could result in the hiring of a sports manager to execute sales, marketing and service of this important segment. Sports tourism is a significant part of Visit Billings 2027.



COOPERATIVE OPPORTUNITIES

MONTANA OFFICE OF TOURISM AND BUSINESS DEVELOPMENT

Visit Billings will continue partnering with the Montana Office of Tourism and Business Development (MOTBD) in marketing and advertising opportunities including print, digital, OOH, and trade shows. There is value in not only leveraging dollars toward increasing audience reach and frequency, but in the association and tie to MOTBD messaging and brand pillars. Digital opportunities that hyper target a qualified audience of travelers have been heavy-lifters for Billings. Accordingly, staff will look first to those opportunities again. In FY18, Visit Billings participated in several of the MOTBD co-op advertising opportunities including iExplore, Sojern and TripAdvisor. Similar placements will be considered in FY19.

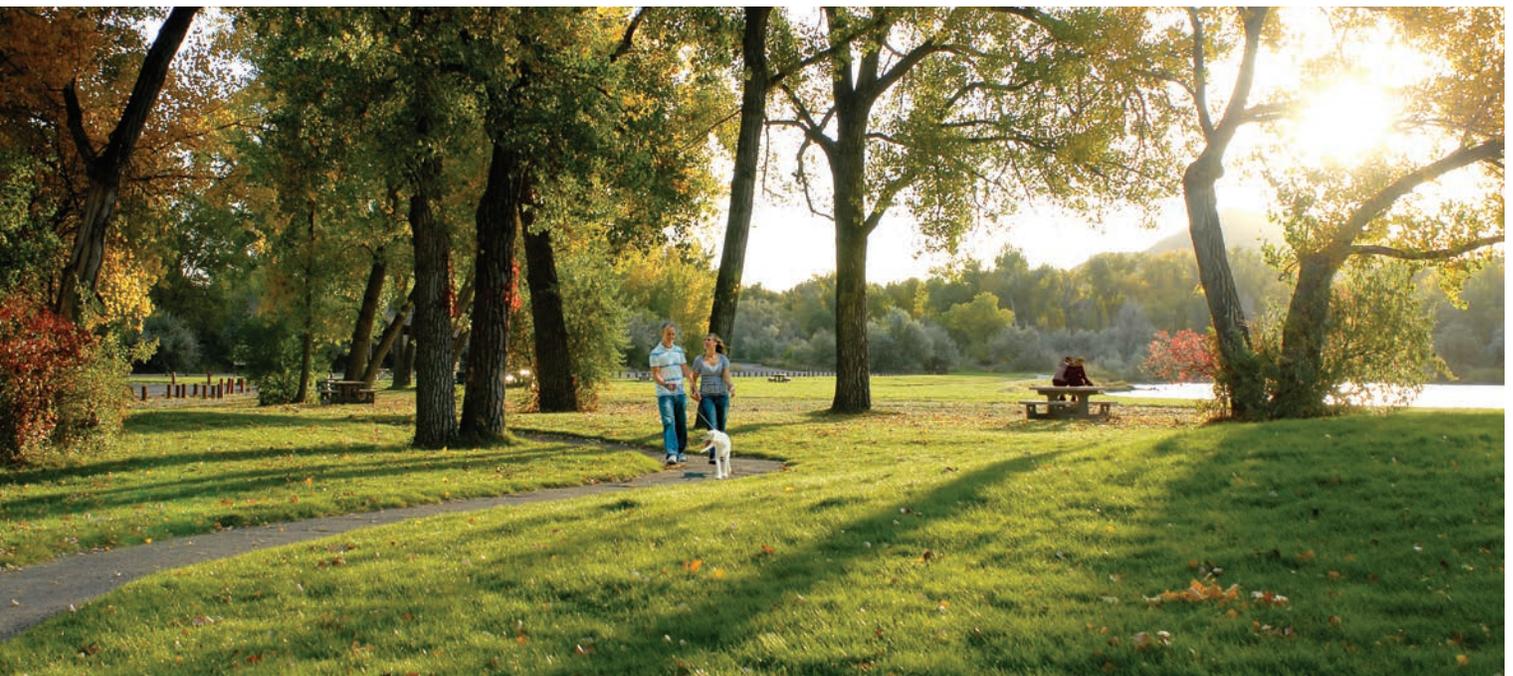
LOCAL AND REGIONAL PARTNERSHIPS

Visit Billings would like to participate in the following cooperative opportunities with Neighboring Regions:

- In the coming year, Visit Billings has plans to partner with Visit Southeast Montana to draw visitors to the area. It's important for the Visit Billings team to maintain a strong alliance with this valued partner.
- Yellowstone Country, and particularly Red Lodge, is another important region where Visit Billings will continue building a relationship. Many successful familiarization tours and wins have been realized through team efforts between Billings and Red

Lodge including the Hot Bike Tour, Outdoor Writers Association of America, BMW MOA Rally and GWRRA Wing Ding 38. Billings is a gateway to the Beartooth Highway (considered part of Yellowstone Country) and Yellowstone National Park via Red Lodge. Billings is also a welcome destination for travelers coming out of the park seeking services, shopping and urban amenities. Visit Billings believes there is value in strengthening the benefits each city offers the other.

- Visit Billings will partner with MOTBD and Montana Regions/CVBs on relevant consumer trade shows when appropriate. Billings has and will continue to partner with MOTBD and Visit Southeast Montana at the Rocky Mountain International Roundup, U.S. Travel Association's IPW and the GoWest Summit. These partnerships have proven successful in the past and are expected to be in the future.
- Finally, falling in line with MOTBD's strategic goals, Billings will partner with the City of Billings, Chamber of Commerce, Yellowstone County, Downtown Billings Alliance and local leaders to preserve the assets and quality of life in the community, maintaining productive dialogue around seeking ways to improve Billings and our product as a year-round destination. The Yellowstone Kelly Interpretive Site renovation at Swords Rimrock Park is a perfect example of community partnership. In FY19, Visit Billings will also be partnering with our locals, the people who have established the character of the destination. We will be establishing our Billings Trail Guide program and seeking inspiration in our people and the stories of the past with tourism product development front of mind.



SOCIAL MEDIA

With instant, real-time access to Instagram photos, TripAdvisor reviews, influencer-sourced listicals and user generated content, the traveler's path to purchase is no longer linear. Instead of selecting a destination first, following by traditional planning research and purchase, they seek travel inspiration and advice through friends, family and influencers as part of their social sphere.

Social media is a top priority in driving awareness and familiarity of Billings and adding Montana's Trailhead to the consideration set of new visitors. FY19 will focus heavily on building brand advocates through initiatives that encourage social sharing and social takeovers, starting with our own local community. Channel strategy will also begin to incorporate initiatives focused on customer service and positioning Visit Billings as a resource for travel guidance while in the destination. The team will continue to integrate social components into marketing campaigns to inspire and orient potential visitors while facilitating guests.

Visit Billings is committed to growing a presence on the following channels:

- › www.Facebook.com/billingsmt
- › www.VisitBillings.com/blog
- › www.Twitter.com/MTsTrailhead
- › www.YouTube.com/BillingsCVB
- › www.Pinterest.com/visitbillings
- › www.Instagram.com/MontanasTrailhead
- › #VisitBillings
- › #RoadToBillings

VISIT BILLINGS BLOG

Half of blog readers seek out travel blogs. In FY17, Visit Billings introduced the DMO's blog. While still a new feature, in FY18, Visit Billings will optimize the use of blogs and will learn how to best integrate the content through other social media platforms. Staff and chosen tourism colleagues or stakeholders will have the opportunity to be authors and feature experiences. Utilization of guest and/or celebrity bloggers and how they experience Billings will be considered as well.

#VISITBILLINGS AND #ROADTOBILLINGS

#VisitBillings is used with all social posts. Staff will continue to encourage hashtag use to increase brand awareness across all segments. #RoadToBillings was used heavily in promotion of the 2017 and 2018 Wells Fargo NAIA Division I Women's Basketball National Championships for pre-event and tournament execution. This was a major success for the brand and the destination. Competing institutions from all over the United States offered feedback to Visit Billings staff after the tournament thanking Visit Billings for getting their student athletes excited about the #RoadToBillings to compete.

INSTAGRAM

Instagram is a vital platform for visual storytelling. Nearly half of all users will be using Instagram Stories by the end of 2018. Visit Billings sees a higher number of users sharing content with the Visit Billings page on this platform than any other. Instagram drives the most engagement per post compared to any social network—84 times more than Twitter, 54 times more than Pinterest and 10 times more than Facebook (SproutSocial). With 95% of Instagram's users also on Facebook (Pew Research Center), cross-promotion of content will drive further reach and engagement.

Nearly half of all Instagram users use the app to help them choose a travel destination. With Instagram's dynamic ads for travel, and the growing use of the platform itself for shopping and booking travel, Visit Billings will explore ways to move travelers further into consideration and booking through this channel.

FACEBOOK

With over 2 billion monthly active users, Facebook maintains its position as the number one social media platform for reach. In combination with paid placement and promoted posts, the best way to drive social traffic for Facebook is to publish fresh, unique content. Visit Billings will implement Facebook Stories and Facebook Live video streaming to showcase real-time destination experiences and attractions, including road races, tournaments, rodeo events, and concerts at Metra Park Rimrock Arena.

Over half of Facebook users say that their friend's photos inspire their travel plans. As Facebook continues to expand its role in the travel space with the launch of app features like "City Guides" in 2017, a direct competitor to "Google Trips," Facebook will more clearly join the ranks of TripAdvisor, Google, etc. in detailed trip planning.

Keeping in mind opportunities with Facebook Stories, Facebook Live, 360 degree photos and video, as well as, augmented and virtual reality, Visit Billings will focus on new ways to engage with Facebook users in FY19.



TWITTER

The top reason people use Twitter is to discover something new and interesting, and travelers are using the platform for all phases of trip planning, and ultimately sharing travel experiences. Twitter users are 45% more likely than other social media users to post opinions about brands (AdWeek). Twitter is also where visitors turn for customer service, including travel planning resources and on-the-ground inquiries (80% of Twitter users access via Mobile and on-the-go). Visit Billings will continue to act as a social concierge, welcoming travelers, answering questions and providing recommendations.

Twitter is a noisy social channel and the lifespan of a Tweet can literally be limited to a few minutes, however, as a real-time tool Twitter can be powerful for customer interaction and event engagement. Recent partnerships in hosting sporting events such as the Wells Fargo NAIA Division I Women's Basketball National Championships showed us that Twitter and sports go hand in hand. The constant engagement, new followers and excitement around the moments that were tweeted live were extremely encouraging. Visit Billings will continue to take advantage of this tool throughout sports events in Billings.

YOUTUBE

Travel videos are some of the most views on YouTube and the channel maintains its status as the second largest search engine in the world. Today, the platform reaches more 18-49 year-olds than any cable

network in the U.S. (Hootsuite). Visit Billings will continue to use YouTube to promote video content, including short-form video and destination stories to showcase Montana's Trailhead. With over half of YouTube's views by mobile or tablet, content will keep in mind consumer viewing habits on these devices.

PINTEREST

Nearly a quarter of online travel planners use Pinterest as a resource. Travelers are using Pinterest as a visual search engine to not only find destination inspiration, but to actually plan, and book, the details of their trip. With 3-billion travel related pins on the platform, it is one of the most popular content categories. Alongside posting frequent custom created pins, repinning content from popular travel bloggers, travel planning sites and other brands will help to establish Visit Billings' Pinterest page as a go to location for planning a trip. This will encourage repeat visitors and followers.

REPUTATION MANAGEMENT

Many potential visitors make decisions based on online reviews, and bad reviews can end a relationship before it has even begun. The Visit Billings Social Media team will monitor the web and select travel websites to manage potential bad reviews and secure a positive reputation for Billings.

PUBLICITY/EARNED MEDIA

The Visit Billings team strives to partner with the Montana Office of Tourism and Business Development (MOTBD), tourism partners and neighboring regions in promoting visitation to Billings, Montana's Trailhead. A few key tactics include the following regarding publicity efforts:

FAMILIARIZATION (FAM) TOURS

FAM tours will be a continued means of showcasing Montana's Trailhead. The team will work independently and with MOTBD to recruit journalists and expose them to Billings and the surrounding regions. In addition to the leads given to Visit Billings by MOTBD, Visit Billings will reach out to journalists on prospective story ideas. When a journalist shows interest, the team will be ready to execute a fully hosted and, if desired, guided experience at Montana's Trailhead. Media gathering entities like Cision will assist by tracking coverage and generating leads.

RELATIONSHIP BUILDING/NETWORKING

Continuing to build relationships with journalists and influencers who best fit the destination's brand, needs and budget will be a focus for

FY19. The benefits of a social media influencer with the right targeted following plays a significant role in adding Billings to the consideration set of new audiences.

CONTENT CREATION

Journalists and influencers need to be inspired by the character and compelling experiences found within a destination. The needs of writers and editors have evolved greatly in the past several years. Traditional press room features such as releases, media kits and image galleries were based on the assumption that media need information. Through the Visit Billings blog among other channels, we will continue to focus on discovering and expressing original stories and generating engaging content in an editorial-ready style.

SEEKING EDITORIAL OPPORTUNITIES

While recruiting journalists to visit, learn and write about the destination, Visit Billings will continue to seek opportunities to submit editorial content for various publications. Leveraging its relationship with Billings365.com, Visit Billings will make it a priority to contribute content that can attract guests and grow visitation.



2018-2019 STRATEGIC GOALS AND MEASURABLE OBJECTIVES

2018-2019 STRATEGIC GOALS

FOCUS: THE VISITOR EXPERIENCE

GOAL #1

FOSTER VISITOR GROWTH AT MONTANA'S TRAILHEAD

Visit Billings, as a destination management and marketing organization, promotes Billings and supports the local tourism economy. The Visit Billings team assists the destination and stakeholders (Billings and Yellowstone County lodging partners) by using strategic marketing campaigns, deliberate activities, tourism leads, sales missions, familiarization tours, publicity efforts and other regional, domestic, and international promotional efforts to increase visitation to the city and region.

Full hotels equate to full restaurants, retail businesses and tourism attractions. In turn, the business climate and local economy thrive. This overarching goal for FY19 fully supports the mission of Visit Billings as the Billings Convention and Visitors Bureau and Billings Tourism Business Improvement District of Billings, Montana.

As the State of Montana prepares for the 2019 Legislative Session, policies that protect and promote travel including improvements to our roads and airports as well as protecting tourism funding and generation, will be a priority for Visit Billings and its managing organization the Billings Chamber of Commerce.

At the same time, on a national level, Visit Billings is proud to continue to support the United States Travel Association's (USTA) Project: Time Off. The average American leaves nearly 17 days of vacation time unused annually. Visit Billings supports the USTA's efforts to disrupt the vacation stigma and will help communicate the message of the importance of taking time off. It's key to personal well-being, professional success, and business performance while vital to local economic expansion.

GOAL #2

THE VISITOR EXPERIENCE

A positive visitor experience is a significant piece of a successful tourism economy. Cynthia Messer with the University of Minnesota's Tourism Center, once stated that every resident of a community is an essential partner in the tourism experience. As she noted, tourism has the opportunity to instill a sense of community pride and knowledge of local history that can elevate a destination and grow visitation. It has been eminent in recent Visit Billings led research findings that the Billings' community lacks civic pride. This can significantly impact visitor growth and visitor experience. As Messer also mentioned in a 2011 article, residents often focus on negative perceptions of a city. They don't see it as a destination. So when a visitor asks basic questions of a resident, certain community-minded frustrations can be discussed like low-wage jobs, a 'nothing to do here' mentality, taxes, or traffic congestion instead

of places to experience as a guest to the community. This mindset aligns with what research shows for Billings. As Visit Billings 2027 evolves, The Visitor Experience strategy will be an umbrella priority. An influence of community pride will play a significant role in the future of visitor growth at Montana's Trailhead. From expanding the Trailhead Tourism Ambassador (TTA) program and shining a light on the importance of visitor orientation and facilitation to developing ways for the community to get involved as tourism ambassadors, we will work to inspire residents to become champions of Billings.

GOAL #3

SUPPORT AIRPORT PROGRESSION

Quality air service as well as pleasant arrival and departure experiences are essential to tourism growth for a destination.

Billings Logan Airport (BIL) is a proven strength for Billings, the surrounding region and Montana. Numerous flights per day serving several major hubs including Salt Lake City, Denver and Minneapolis/St. Paul, help grow visitation at Montana's Trailhead and sustain a strong business climate. In FY17, American Airlines (AA) announced daily, year-round, direct service between Billings (BIL) and Dallas/Fort Worth, Texas (DFW) as Billings secured a Small Community Air Service Development Program Grant from the Federal Government. In FY19, that service may expand following a successful first 12 months of service. Visit Billings will work in tandem with community partners including the Chamber of Commerce, Big Sky Economic Development and the City of Billings to help sustain this newly established flight together with BIL officials.

In FY19, Visit Billings will continue to assist partners in fostering relationships with air carriers serving the city including United, Delta, American Airlines, Alaska Air, Allegiant and CapeAir. Together with the Billings Chamber's Air Service Committee, Visit Billings staff and the TBID Board of Directors will monitor growth and expansion opportunities for air service into BIL and will foster relationships with air carrier officials.

As the City of Billings and its Aviation and Transit Department work to move the destination forward with expanded air service and by enhancing the traveler's experience, Visit Billings will provide leadership support for the City's \$47M airport expansion and development project. This is a crucial piece to tourism growth in Billings and southeast Montana. Visit Billings will also foster its relationship with the Montana Office of Tourism and Business Development (MOTBD) in the agency's efforts to grow air service for the state of Montana as a whole.

GOAL #4**INCREASE LEISURE VISITATION**

Investing in leisure tourism marketing strategies is a top objective for Visit Billings. The regional, national, and in some cases, international, markets support the majority of Visit Billings' stakeholders.

From the regional resident to the international traveler, Billings is an attractive destination. Local amenities and gateway access to national historic, cultural and natural attractions help strengthen the destination's brand and boost visitation. The overall leisure marketing strategy is to increase year round visitation targeting regional, national and international travelers. In FY17, the team began the process of assessing and diversifying the organization's leisure marketing efforts. These strategies will continue to be assessed and expanded in FY19.

As of the publishing of this document, Visit Billings was approaching the end of a year-long, tourism research project with Destination Analysts. The final research report is expected during the first quarter of FY19. At this time, this information obtained that helps guide marketing efforts for the organization will be released to all stakeholders and also contemplated and considered by the Visit Billings staff. Then, together with the Visit Billings creative agency of record, BCF Agency, this research will be applied in future marketing efforts to help grow leisure visitation for the destination.

GOAL #5**SPORTS TOURISM AT MONTANA'S TRAILHEAD**

Strong gains in sports tourism have helped position Billings as a sports events destination since 2012. Continuing to position Billings as a sports events destination will remain a priority. In FY19, Visit Billings staff, together with the Tourism Business Improvement District (TBID) Board of Directors, will plan to expand sports tourism efforts for Visit Billings as a destination marketing and management organization.

Supporting public partners like the City of Billings, Yellowstone County, and South Billings Urban Renewal District as well as private investors and sports supporters will be important to Visit Billings staff and the future of this tourism segment. Meanwhile, continuing to foster relationships with MSU Billings, Rocky Mountain College, the Big Sky State Games, and YMCA, as well as other youth and amateur tournament directors will be a priority.

As FY20 approaches, Visit Billings will be prepared to hire a sports sales manager, partner with strategic partners to create a sports-tourism focused committee that will also support youth and amateur sports from a community point of view, continue to apply findings from research released in the Yellowstone County Sports Facility Feasibility Study executed by Victus Advisors in 2018, and, finally, will build off of past successes to prepare the destination for sports tourism growth in the future – Visit Billings 2027.

GOAL #6**MEETINGS AND CONVENTIONS RECRUITMENT**

The meetings and conventions recruitment conversation is significant at Montana's Trailhead. The value of this tourism segment for Billings must be elevated. Tradeshows, business meetings, conventions, and conferences all bring people and business to Billings – directly impacting the local economy year-round. Working with stakeholders and strategic partners, Visit Billings staff will continue to grow this segment which speaks for 24% of visitation to Billings (RTM, 2010). As a destination marketing and management organization, Visit Billings will collaborate with tourism partners to market and grow this segment for Billings. These efforts will include strategic marketing campaigns, tradeshow attendance, one-on-one meeting planner exchanges, mining leads, sales missions, and meeting planner-focused familiarization tours.

Simultaneously, updated research, expected to be released mid-year 2018, along with Chamber of Commerce efforts to spotlight the importance of a regional convention center for Montana, will help define the future of this market for Billings. Visit Billings is a proud strategic partner with the Hammes Company in the future of One Big Sky District. This development project focuses on a large-scale convention center which would complement Billings' six smaller convention center properties and MetraPark as an exhibition, agricultural and arena focused venue. Visit Billings will leverage its efforts and will drive innovation in this tourism realm.

GOAL #7**THE INTERNATIONAL MARKETPLACE**

Visit Billings appreciates its relationship with the Montana Office of Tourism and Business Development (MOTBD), Rocky Mountain International, Brand USA and other entities that help grow international travel to the western United States.

In recent years, top leisure activities for overseas visitors were ranked as follows: (1) shopping, (2) sightseeing, (3) fine dining, (4) national parks/ monuments and (5) amusement/theme parks. Visit Billings will continue to work together with the MOTBD and partners like Visit Southeast Montana to better position eastern Montana for international travel experiences.

Visit Billings has worked with Brand USA, Rocky Mountain International and events like the U.S. Travel Association's IPW Marketplace to help foster relationships in specific international regions. Strong relationships have been built to countries like Italy, Germany and the UK, but there is much work to be done especially considering concerns surrounding a reported decline in U.S. competitiveness for international travel dollars in recent years (United State Travel Association). As a destination, Billings aligns well with the goals of the international visitor with plans to experience the west, National Parks, and Montana.

Visit Billings will again work in FY19 to provide more education to tourism partners and stakeholders (sponsored workshops) to help research and grow promotional programs aimed at attracting and accommodating the international traveler and international group tours. International familiarization tours will also remain a priority to help staff and stakeholders build relationships with international tour operators.

MEASURABLE OBJECTIVES

	FY13	FY14	FY15	FY16	FY17	FY18 - YTD*
Total Bookings	30	42	36	47	45	33
Citywide Events	4	2	4	4	3	6
Meetings & Conventions	16	26	20	23	22	16
Sports Events	10	14	5	10	10	7
Citywide Sports Events	-	-	7**	10	10	4
Total Room Nights	24,130	28,465	55,164	30,924	42,300	24,678
Web Visit Sessions	146,070	131,278	190,759	241,457	158,215	161,812
Room Demand	3.40%	***-1.7%	-0.50%	-1.70%	4.20%	TBD

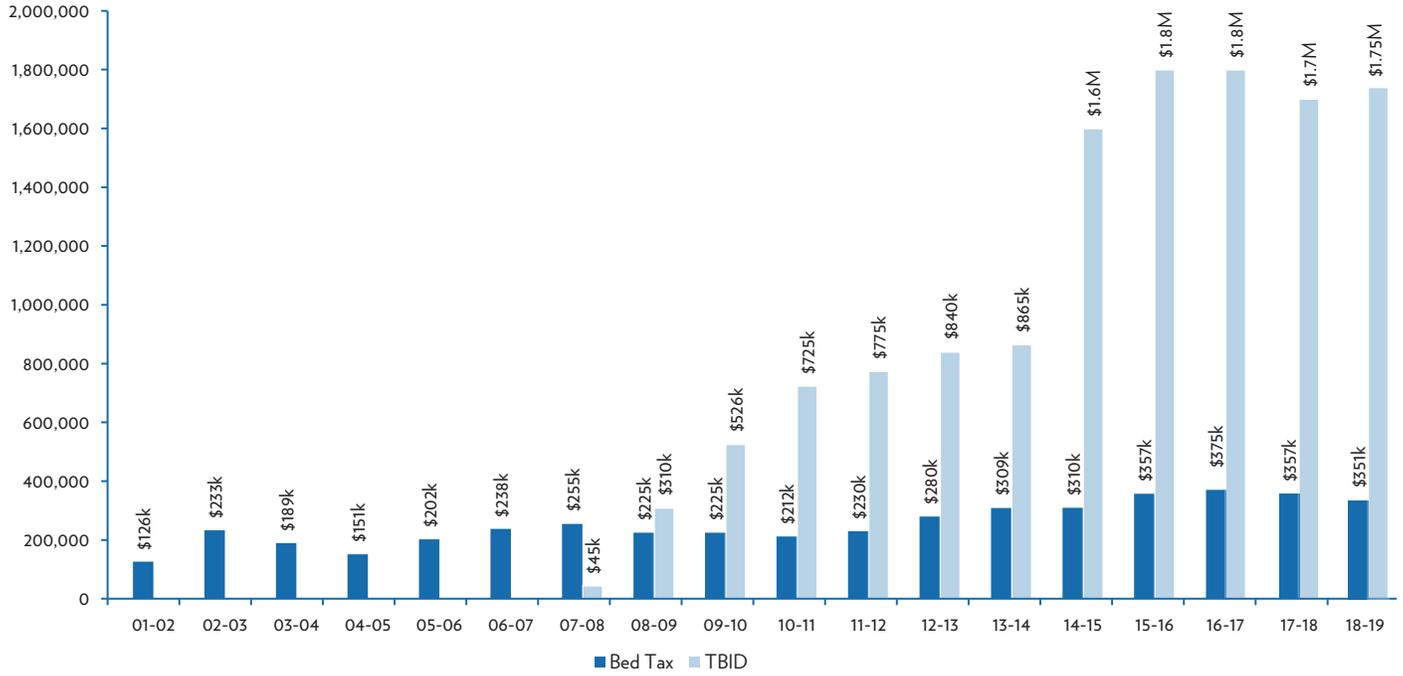
*The data for this plan was extracted during the third quarter of FY18. All FY18 information is YTD as of April 1, 2018.

**First official entry for Citywide Sports Events.

***Billings Logan Airport was closed for seven (7) weeks in July and August of 2013, for runway resurfacing. This closure had a huge impact on Room Demand and Occupancy in Billings.

ITEM	DEFINITION
Citywide Events	A group utilizing three or more hotels with approximately 400 peak room nights and approximately 8,000 square feet.
Meetings & Conventions	Anything smaller than defined above.
Sports Events	Any athletic event that utilizes hotel rooms and a sports venue in the Billings area.
Citywide Sports Events	A sports group utilizing three or more hotels with approximately 400 peak room nights and approximately 8,000 square feet.
Total Bookings	Citywide Events + Meetings/Conventions + Sports Events
Total Room Nights	Total room nights sold.
Web Visits	Success is measured by total visits to VisitBillings.com. Conversion is considered to be any activity beyond the home page. Google Analytics is used for tracking and monitoring.
Stakeholder Survey	Annual survey sent to Stakeholders soliciting feedback, graded on a 0-100% scale.
Room Demand	Increased visitation YOY.

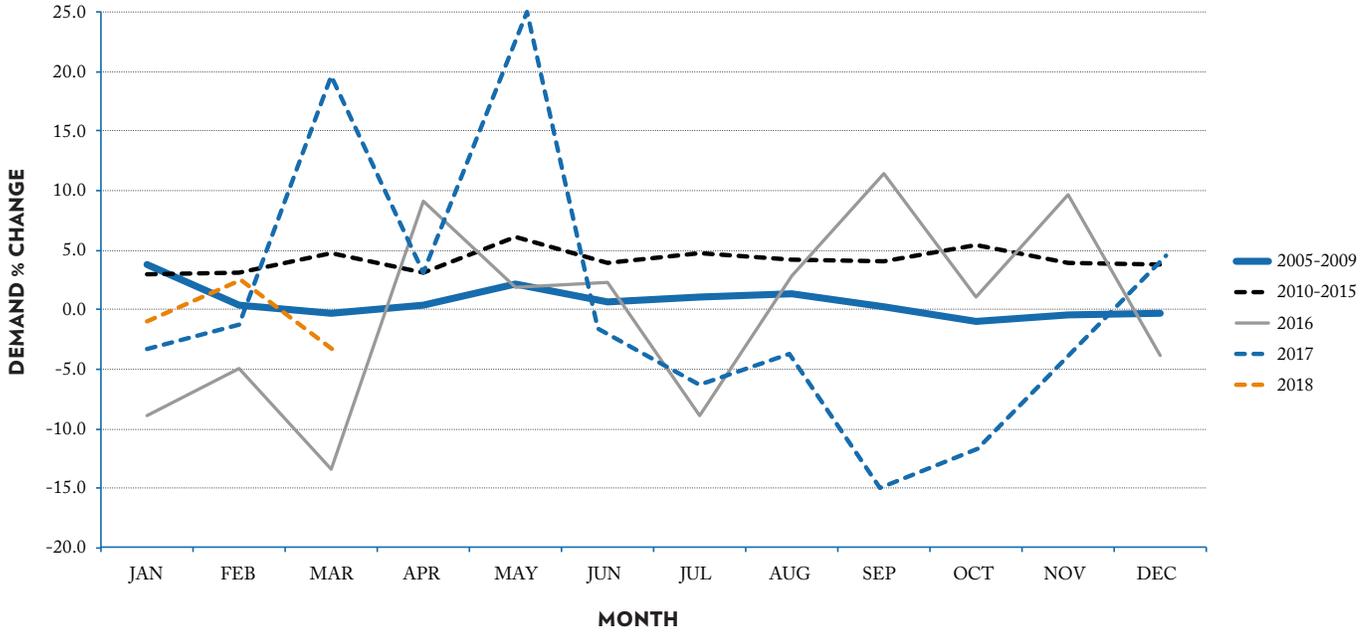
COLLECTIONS 2000-2017





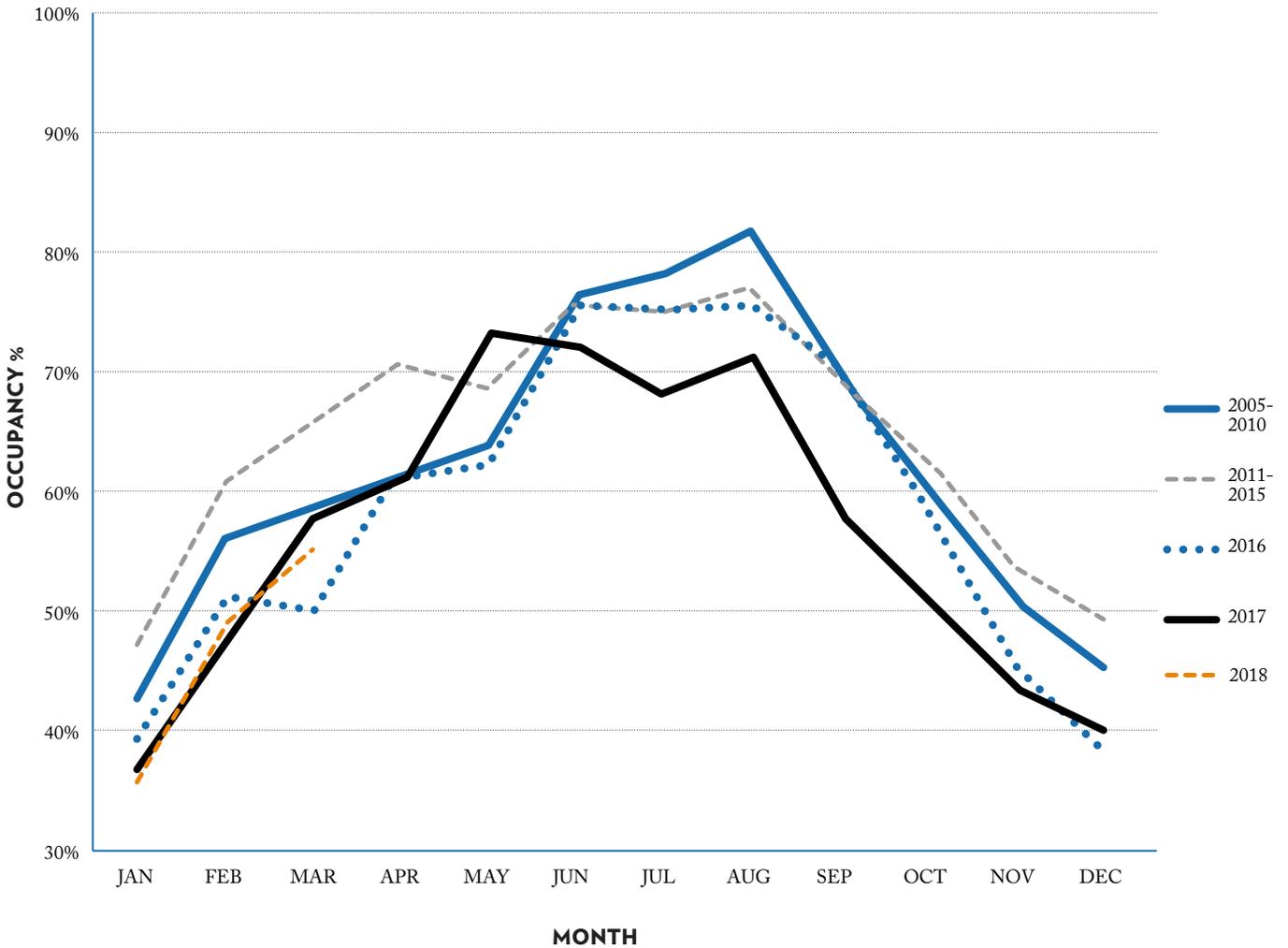
ROOM DEMAND

Demand reflects accurately increased visitation. Where Occupancy is impacted by the number of rooms in inventory, Demand is a true picture of the number of total rooms sold.



ROOM OCCUPANCY

Room Occupancy is $(\text{Rooms Sold}) \div (\text{Rooms Available}) \times (100)$. Occupancy is expressed as a percentage of rooms occupied.



ROOM OCCUPANCY DATA INSIGHT

YEAR	CENSUS PROPERTIES	CENSUS SLEEPING ROOMS
2005	43 hotels	3,759 rooms
2010	45 hotels	3,992 rooms
2015	50 hotels	4,493 rooms
2017	54 hotels	4,840 rooms

* All data based off reporting to Smith Travel Research (STR)





BUDGET



BUDGETS

STATE LODGING TAX BUDGET (CVB)

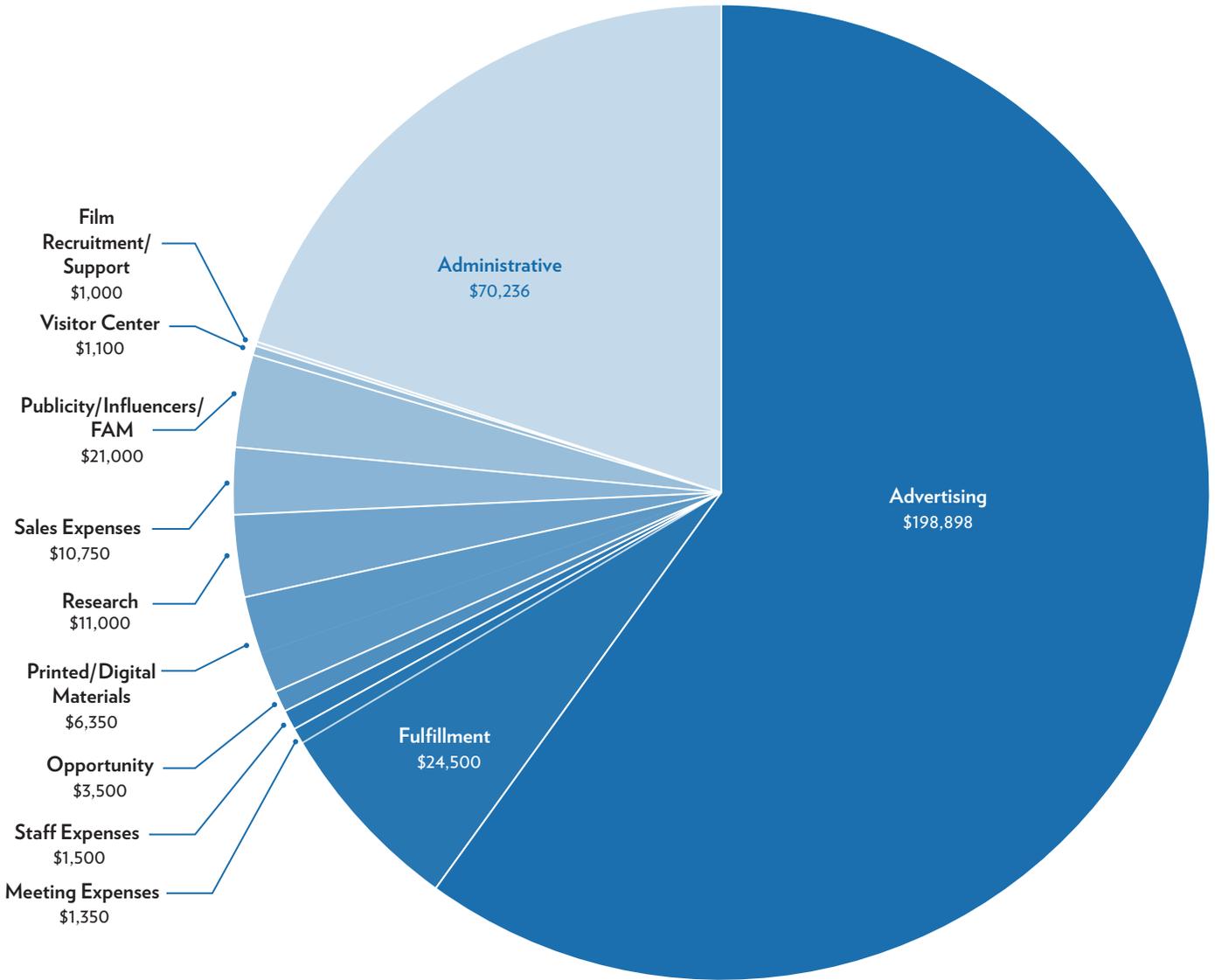
Advertising	\$198,898
Fulfillment	\$24,500
Printed/Digital Materials	\$6,350
Sales Expenses	\$10,750
Publicity/Influencers/FAM	\$21,000
Opportunity	\$3,500
Research	\$11,000
Visitor Center	\$1,100
Film Recruitment/Support	\$1,000
Staff Expenses	\$1,500
Meeting Expenses	\$1,350
Administrative	\$70,236

TOTAL FY19 BUDGET \$351,184





STATE LODGING TAX DOLLARS (CVB)



Projected Lodging Tax Income: \$351,184

TOTAL LODGING TAX BUDGET: \$351,184

BILLINGS TOURISM BUSINESS IMPROVEMENT DISTRICT (BTBID) BUDGET

REVENUES TOTAL \$1,750,000

Collections	\$1,750,000
FY18 Carryover	\$24,291

MARKETING TOTAL \$1,432,000

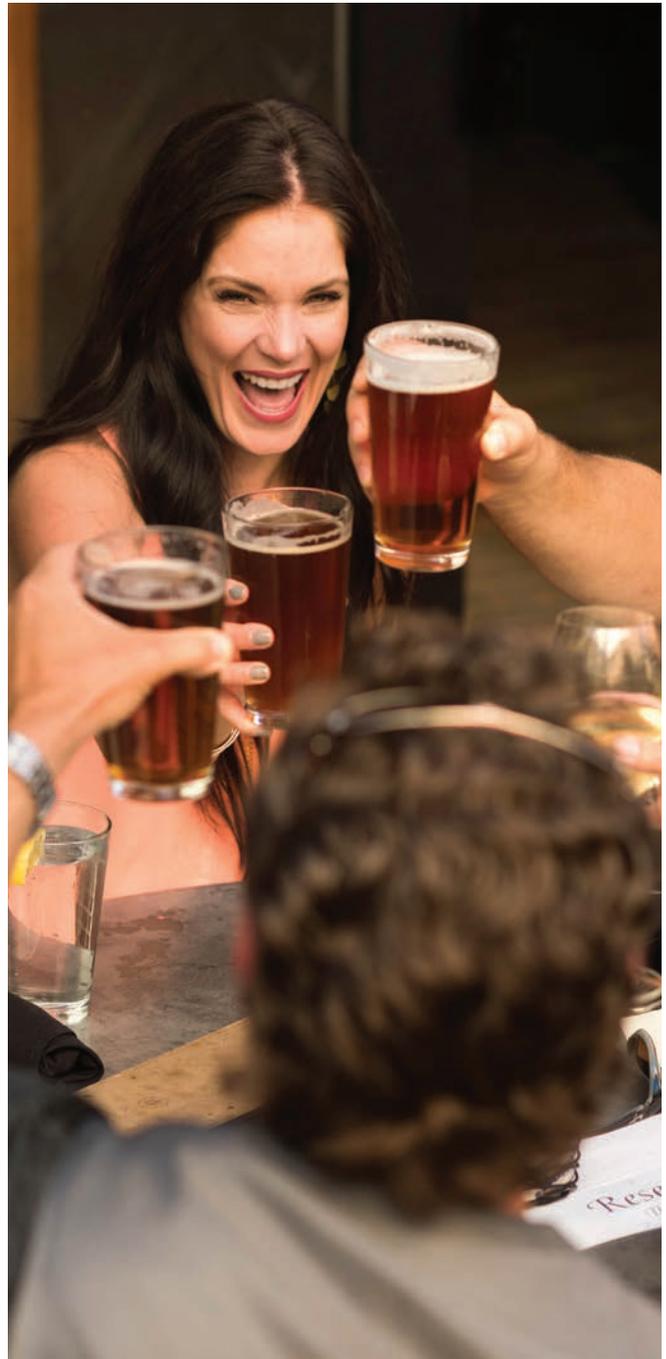
Advertising	\$710,500
Opportunity	\$135,000
Printed & Digital Materials	\$94,500
Sales & Servicing	\$216,500
Meetings/Convention/Leisure Recruitment (Tradeshows)	\$57,000
Publicity & Research	\$47,000
Website	\$21,000
Film	\$1,000
Visitor Information Center	\$10,500
Marketing & Sales Staff	\$139,000

ADMINISTRATIVE TOTAL \$342,291

Fulfillment & Overhead	\$89,646
Staff Expenses & Benefits	\$252,645

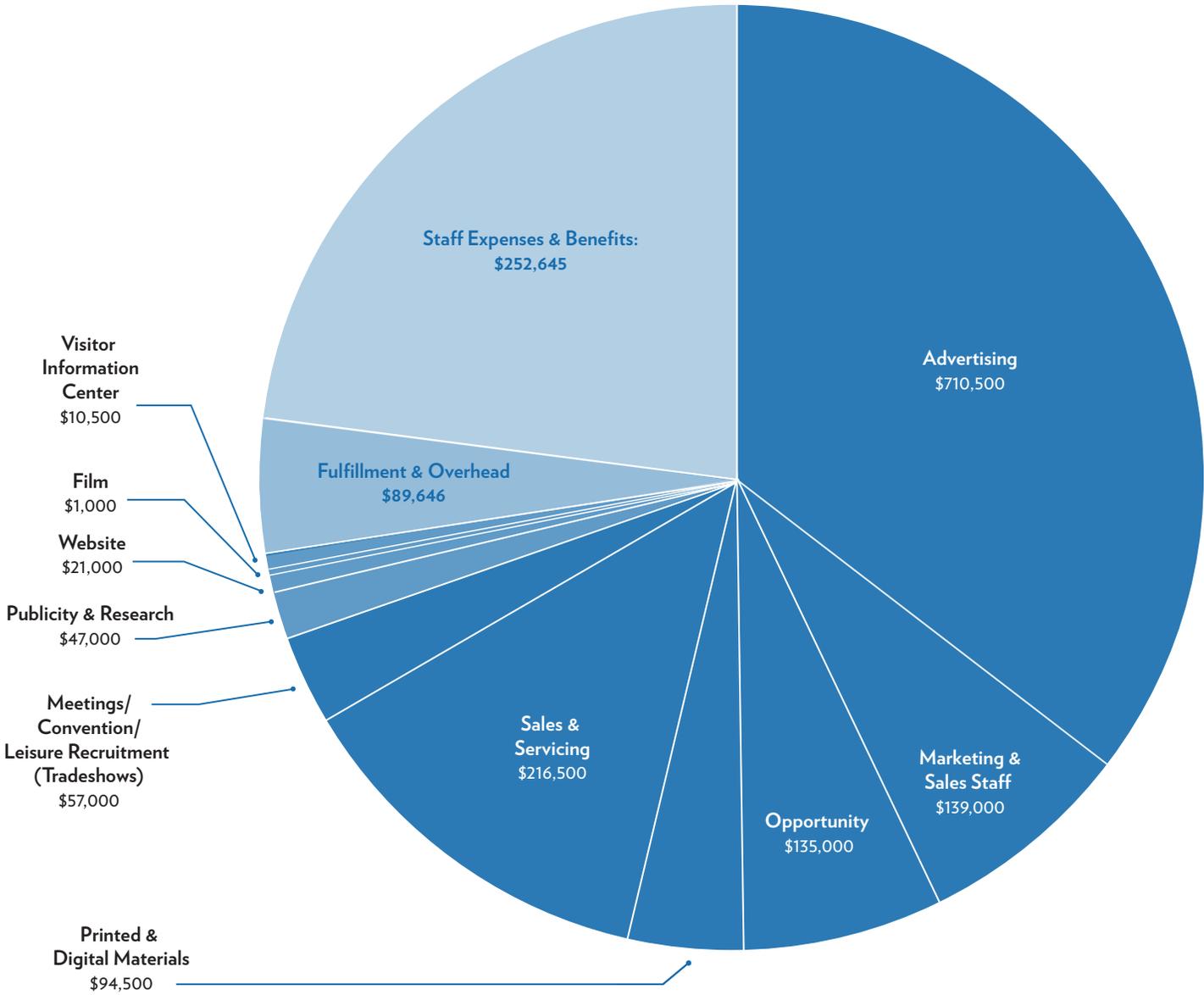
BTBID TOTAL EXPENSES \$1,774,291

Applied BTBID Reserves for American Airlines DFW/BIL Air Service Subsidy	\$200,000
Reserves Total as of April 30, 2018	\$50,000





BILLINGS TOURISM BUSINESS IMPROVEMENT DISTRICT (BTBID) DOLLARS - BUDGET FY19



BTBID TOTAL EXPENSES: \$1,774,291

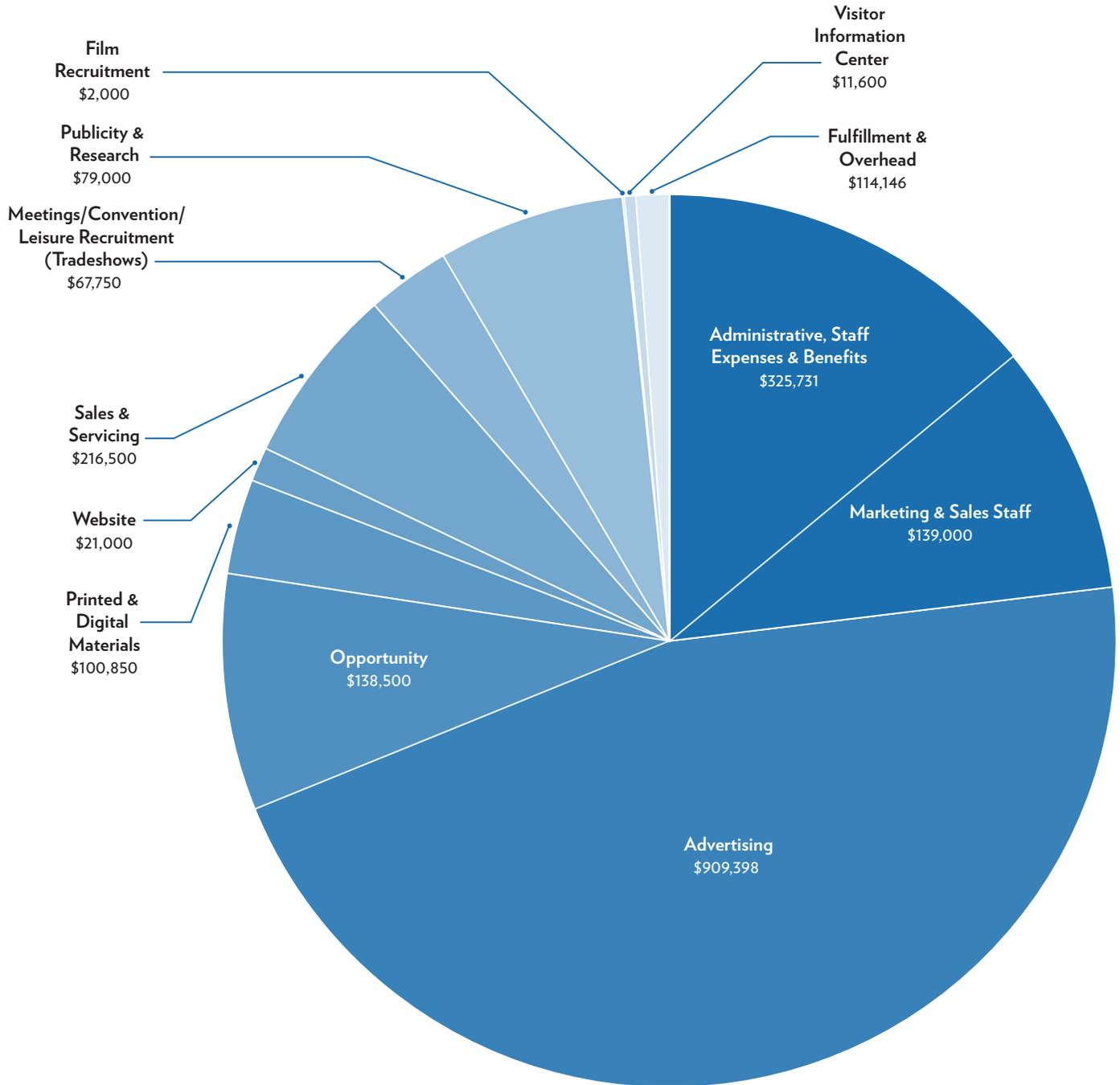
REVENUES TOTAL \$1,750,000
 Collections \$1,750,000
 FY18 Carryover \$24,291

BTBID RESERVES \$50,000*

*In FY18, \$200,000 of BTBID Reserve Funds were utilized in support of the American Airlines DFW/BIL Air Service Subsidy and the Small Community Air Service Development Grant. As of April 2018, it is anticipated that BTBID Reserves could be replenished to a stronger level depending on the final true-up with American Airlines. However, this budget document, due to the City of Billings on 4/30, does not reflect that amount in the essence of the budget deadline and the final true-up.



COMBINED TOTAL TOURISM BUDGET ILLUSTRATION (CVB + TBID)



Lodging Tax Budget: \$351,184
 TBID Budget: \$1,774,291

TOTAL VISIT BILLINGS BUDGET: \$2,125,475

Figures are projected; final figures to be determined.

