



**MONTANA  
OFFICE OF TOURISM AND  
BUSINESS DEVELOPMENT**

**EASTERN MONTANA TOURISM  
STAKEHOLDER RESEARCH**

**JUNE 2019**

Report of findings prepared for the  
Montana Office of Tourism and Business Development by:

Destination  Analysts

# TABLE OF CONTENTS

<b>Project Overview</b>	<b>3</b>
<b>Eastern Montana Regional Comparison Summaries</b>	<b>5</b>
<b>Executive Summary</b>	<b>11</b>
<b>Regional Objectives</b>	<b>15</b>
<b>Eastern Montana Destination Attributes &amp; Challenges</b>	<b>18</b>
<b>Hunting &amp; Fishing</b>	<b>22</b>
<b>Ideas for Moving Forward</b>	<b>25</b>
<b>Appendix: Supplemental Regional Data</b>	<b>37</b>

# PROJECT OVERVIEW

# Project Overview: Increasing Bed Tax Collections in Eastern Montana

---

Over the past decade, Montana’s tourism industry has experienced considerable growth. From 2008 to 2018, the number of non-resident visitors to the state grew 24 percent, from 10 million to 12.4 million persons annually. Along with this growth has come increased visitor spending and tax revenue generation for the state and its municipalities. Unfortunately, this growth in tourism has not been constant, nor has it been spread evenly across the state’s diverse zones. In fact, despite this being a period of growth for the state overall, hotel tax collections have actually declined in the eastern region of the state over the last few years.

To remedy this problem, the Montana Department of Commerce—Office of Tourism and Business Development launched this initiative. The research-based portions of the project included three main goals:

1. Assess the situation and understand the needs, ambitions and opinions of residents of eastern Montana as related to tourism,
2. Create a set of recommendations (a playbook) for industry key regional stakeholders to consider using to spur visitation, and
3. Develop quantitative benchmarks for measuring success.

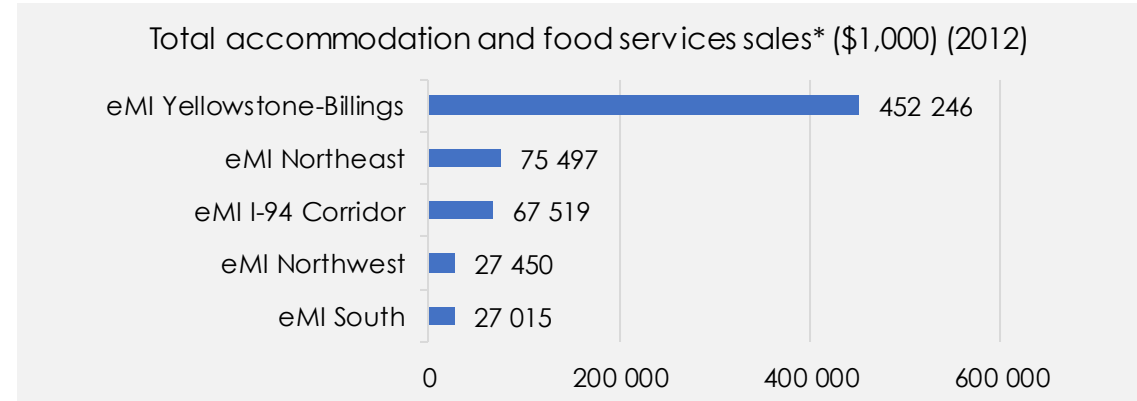
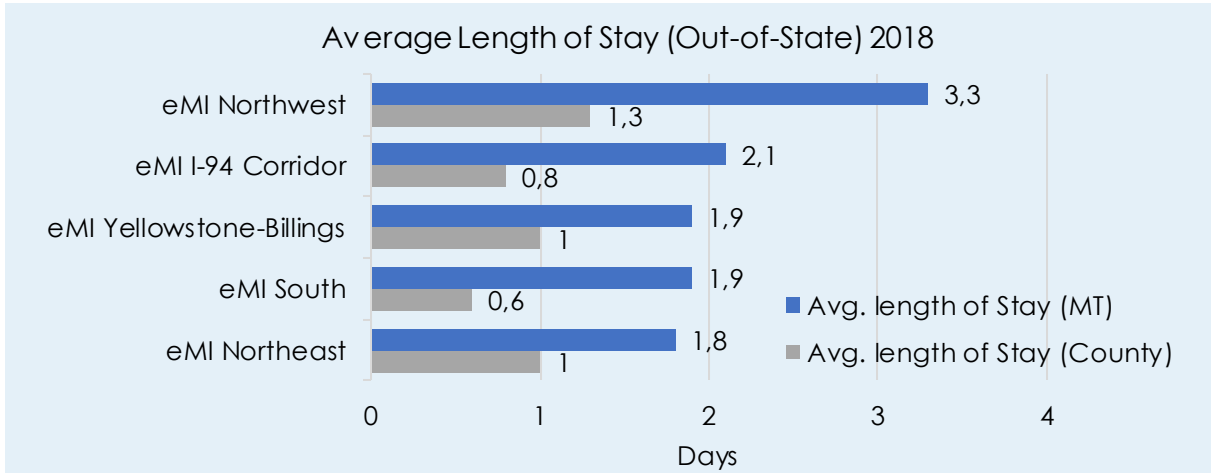
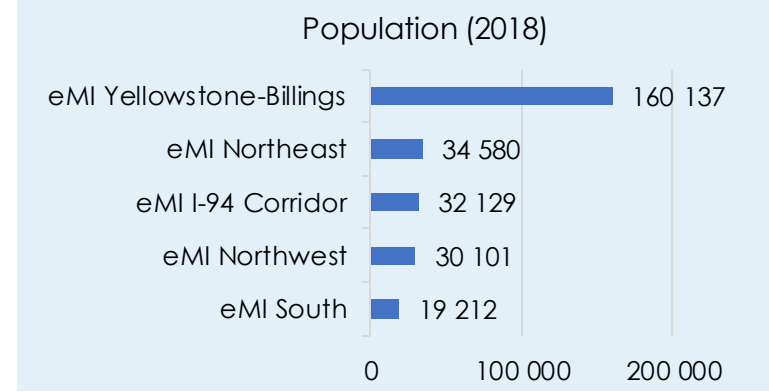
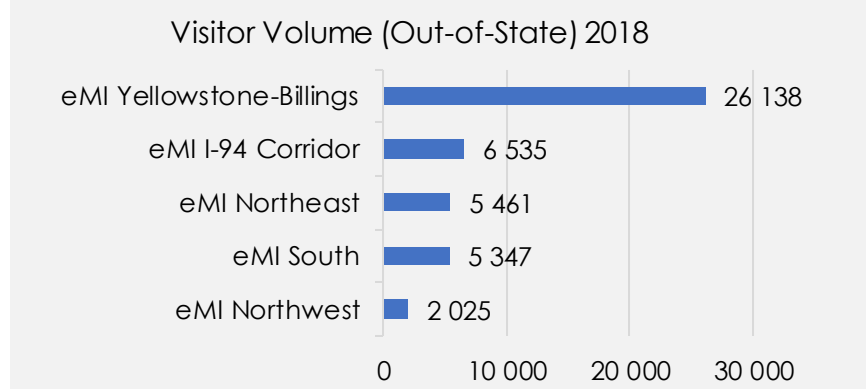
This report primarily addresses the first of these goals: understanding the region’s needs, ambitions and opinions. In order to collect information needed for such, a series of stakeholder listening sessions were conducted around the eastern half of the state. The Office of Tourism and Business Development invited key industry stakeholders to attend two-hour listening sessions held in the following locations:

- Billings
- Hardin
- Terry
- Sidney
- Glasgow
- Lewistown

The sessions were well-attended, but due to previous commitments and travel distances, some stakeholders were not able to attend. Private telephone interviews were thus conducted with those stakeholders who were unable to attend the in-person meetings described above. All listening sessions were also attended by staff from the Montana Office of Tourism and Business Development. Meeting planning and logistical responsibility were given to contractor Big Sky Strategies & Solutions; while Destination Analysts, Inc. was responsible for moderating the sessions and summarizing the results, presented herewithin this report.

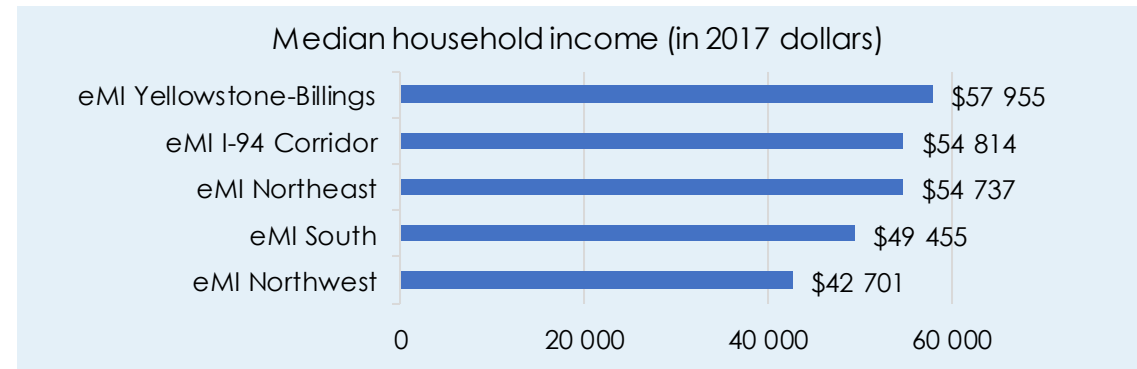


# eMI Regional Comparison



### Top Feeder Markets 2018

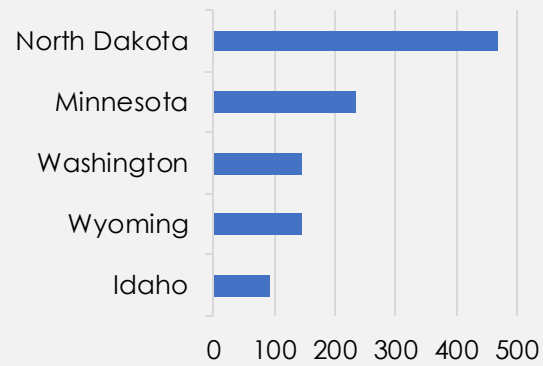
eMI Northwest	North Dakota
eMI Northeast	North Dakota
eMI I-94 Corridor	North Dakota
eMI South	Wyoming
eMI Yellowstone-Billings	Wyoming



\*Sources used on this page: Arrivalist, U.S. Bureau of the Census, eMI Listing Sessions, 2019



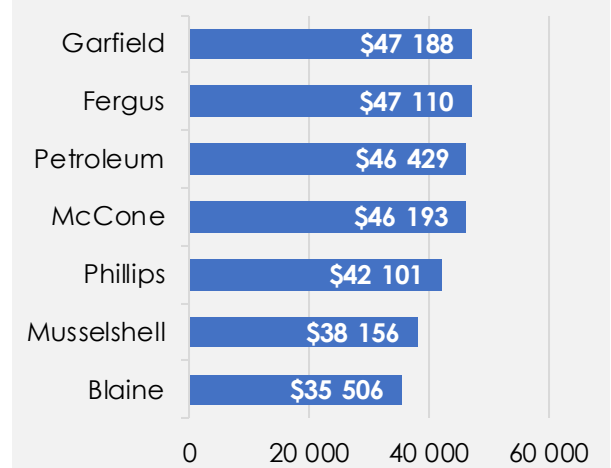
Top Feeder Markets (States) 2018



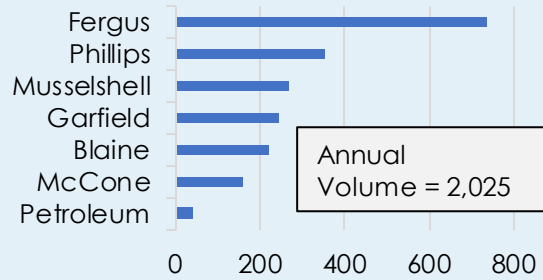
Population (2018)

	Population	% Change from 2010 to 2018
Fergus	11,113	-4.1%
Blaine	6,807	4.9%
Musselshell	4,651	2.5%
Phillips	4,074	-4.2%
McCone	1,675	-3.4%
Garfield	1,268	4.9%
Petroleum	513	5.1%

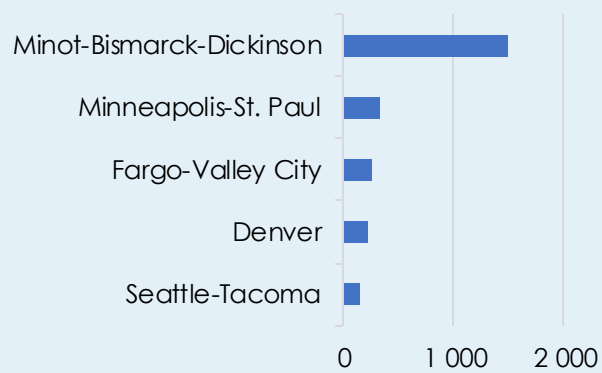
Median Household Income 2018



Visitor Volume (County) (Out-of-State) 2018



Top Feeder Markets (Metro Areas)



Key Attractions (Reported in listing sessions)



Lewistown Montana Chokecherry Festival, Lewistown



Charles M. Russell National Wildlife Refuge



Montana Cowboy Poetry Gathering



Montana Dinosaur Trail



Hell Creek State Park



Bear Gulch Pictographs in Forest Grove

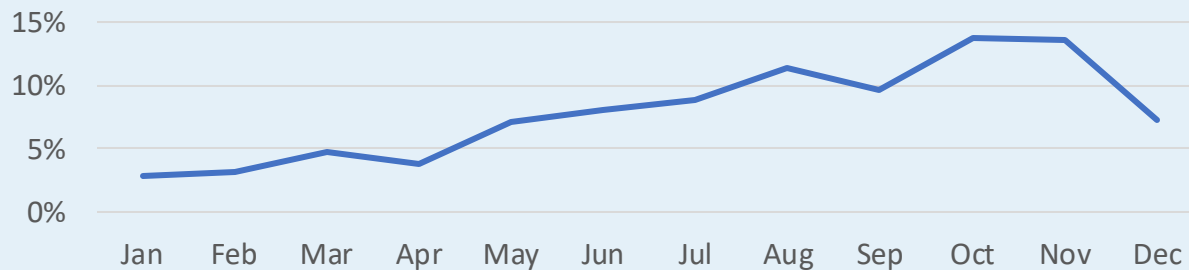


Upper Missouri River Breaks National Monument

Length of Stay

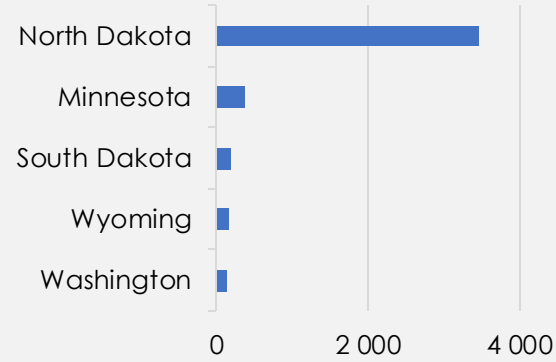
1.3 Region 3.3 Montana

Month of Arrival (Out-of-State) (2018)





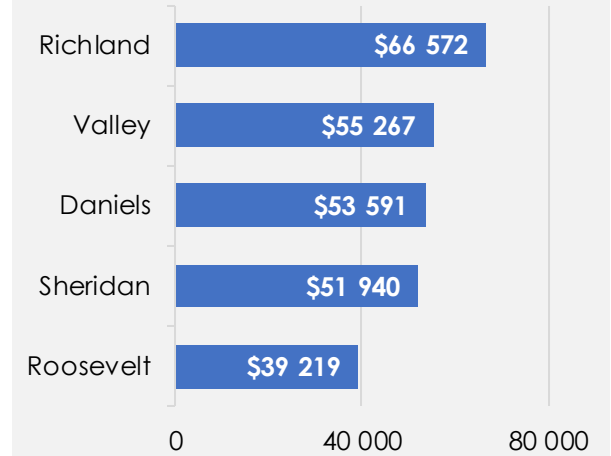
### Top Feeder Markets (States) 2018



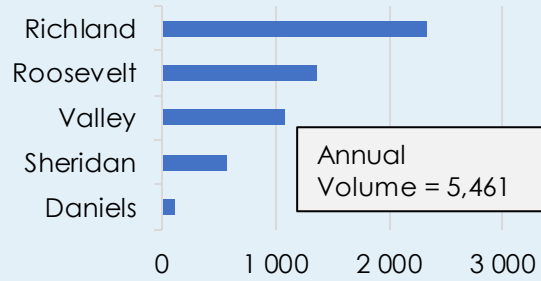
### Population (2018)

	Population	% Change from 2010 to 2018
Roosevelt	11,059	6.1%
Richland	10,913	12.0%
Valley	7,437	0.9%
Sheridan	3,424	1.2%
Daniels	1,747	-0.2%

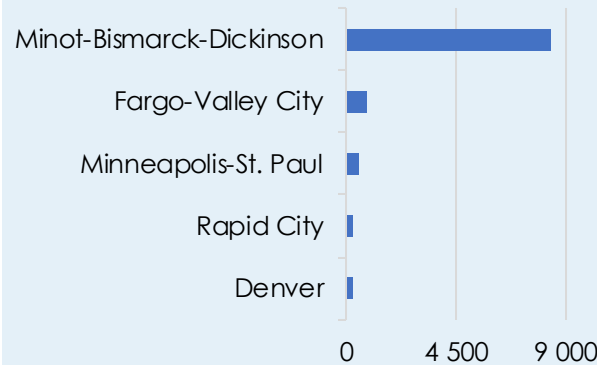
### Median Household Income 2018



### Visitor Volume (County) (Out-of-State) 2018



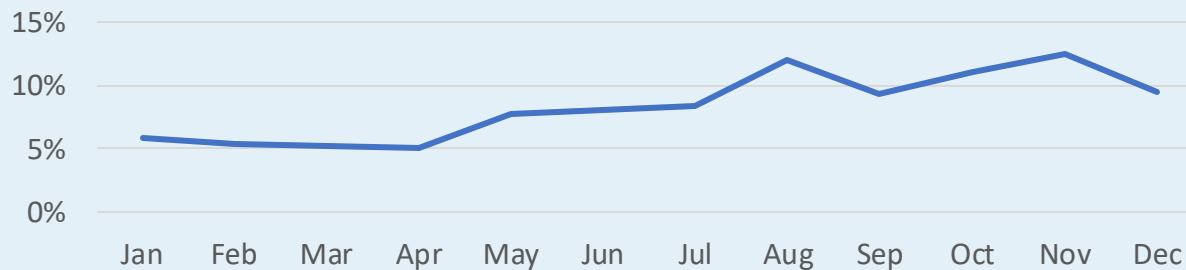
### Top Feeder Markets (Metro Areas)



### Length of Stay

**1.0** Region    **1.8** Montana

### Month of Arrival (Out-of-State) (2018)



### Key Attractions (Reported in listing sessions)



Fort Peck Lake



Pioneer Museum of Valley County



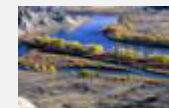
Fort Peck Summer Theater



Fort Union Trading Post



Fort Peck Interpretive Center

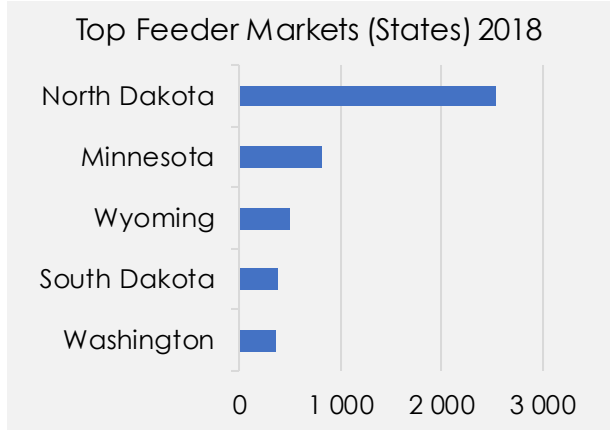
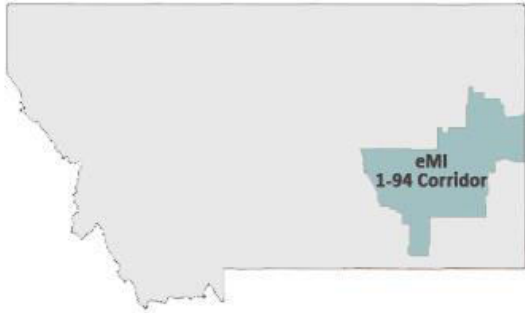


Charles M. Russell National Wildlife Refuge



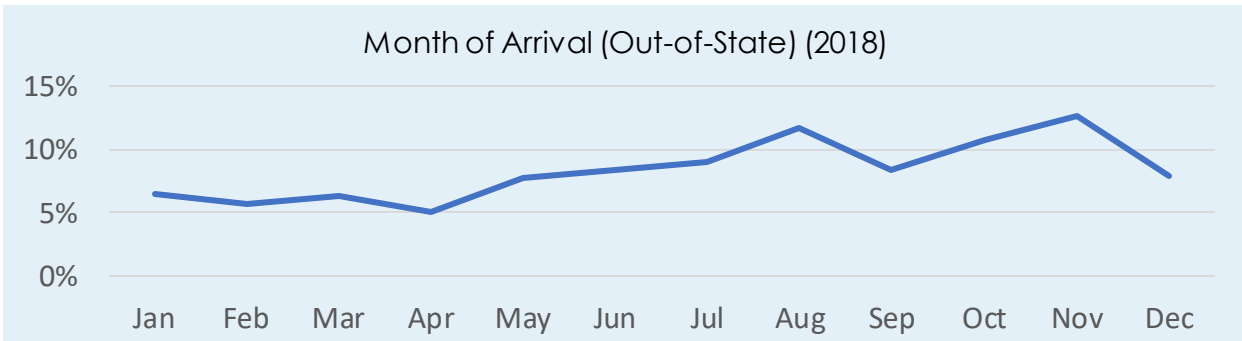
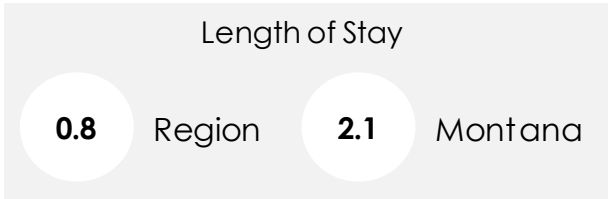
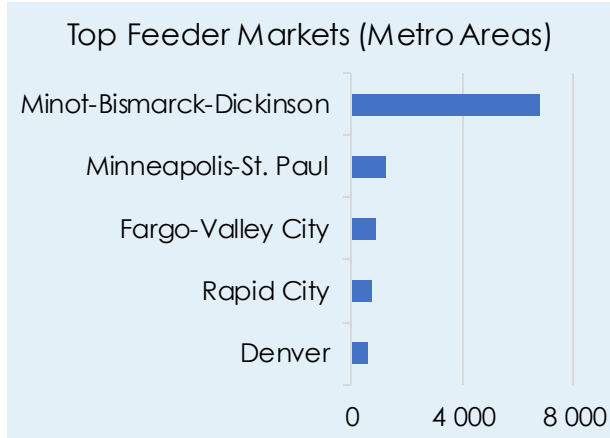
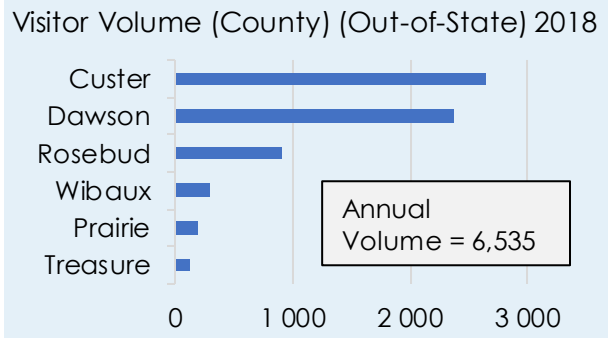
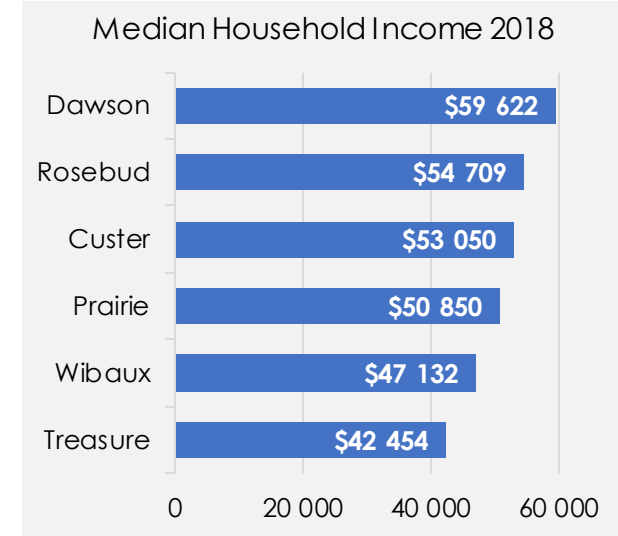
Lewis and Clark Bridge

# eMI I-94 Corridor



### Population (2018)

County	Population	% Change from 2010 to 2018
Custer	11,586	-1.0%
Rosebud	9,063	-1.9%
Dawson	8,680	-3.2%
Prairie	1,087	-7.8%
Wibaux	1,034	1.7%
Treasure	679	-5.4%



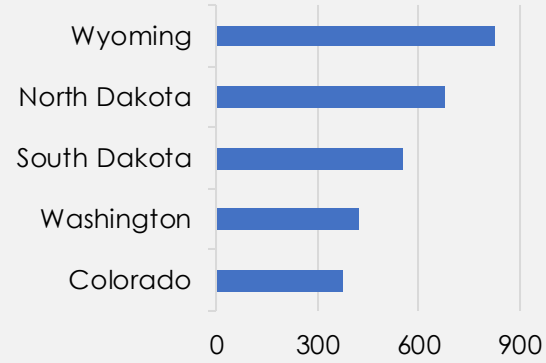
### Key Attractions (Reported in listing sessions)

	Bucking Horse Sale		Range Riders Museum
	Makoshika State Park		Montana Dinosaur Trail
	Glendive Dinosaur & Fossil Museum		Frontier Gateway Museum





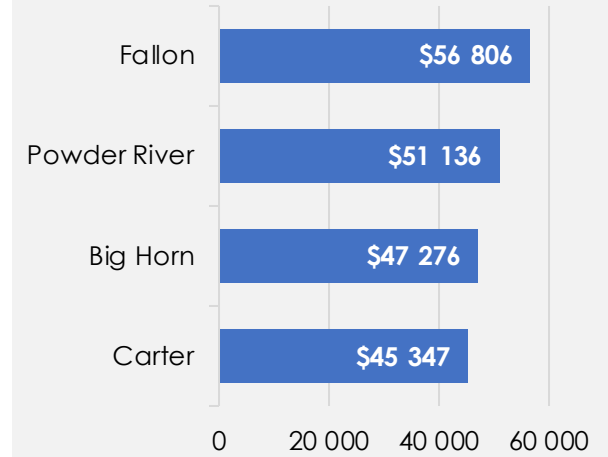
### Top Feeder Markets (States) 2018



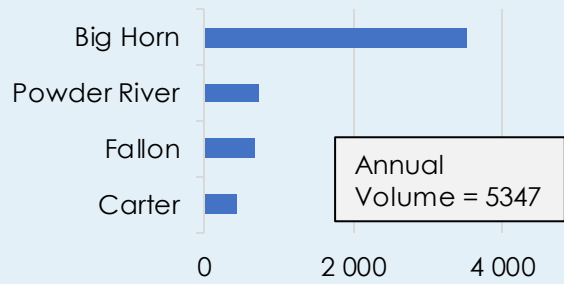
### Population (2018)

	Population	% Change from 2010 to 2018
Big Horn	13,338	3.7%
Fallon	2,920	1.0%
Powder River	1,716	-1.5%
Carter	1,238	6.7%

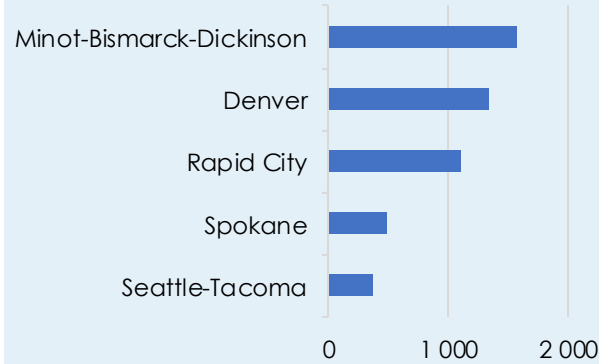
### Median Household Income 2018



### Visitor Volume (County) (Out-of-State) 2018



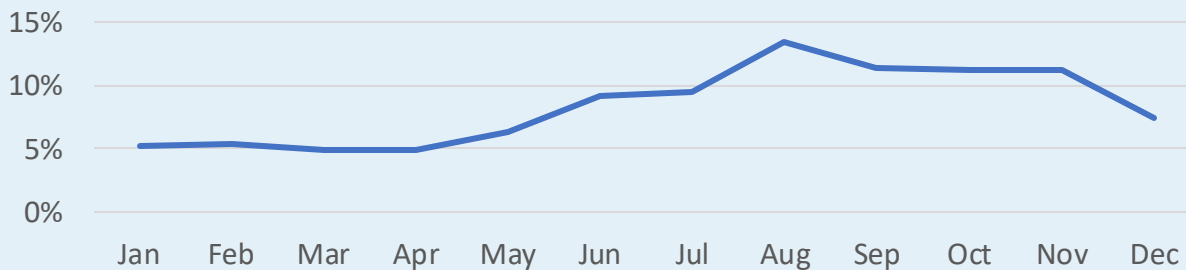
### Top Feeder Markets (Metro Areas)



### Length of Stay

0.6 Region      1.9 Montana

### Month of Arrival (Out-of-State) (2018)



### Key Attractions (Reported in listing sessions)



Little Bighorn Battlefield/Custer National Cemetery



Medicine Rocks State Park



Crow Fair Celebration Powwow & Rodeo



Bighorn Canyon National Recreation Area



Tongue River Reservoir State Park



Montana Dinosaur Trail



Bighorn County Historical Museum

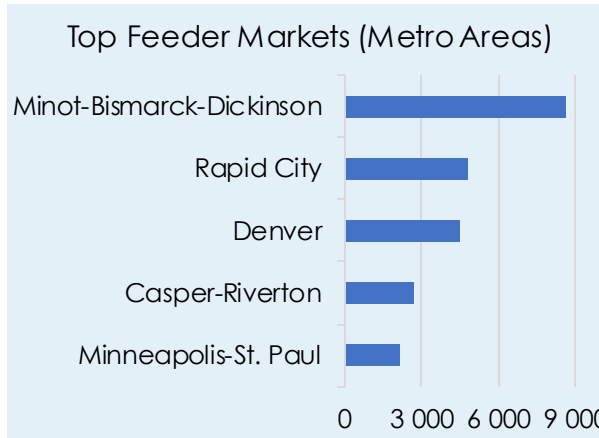
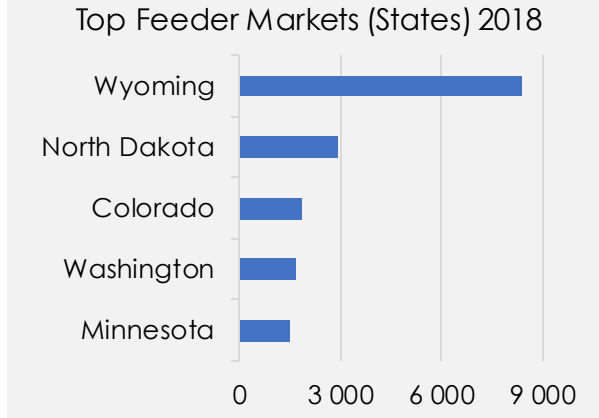
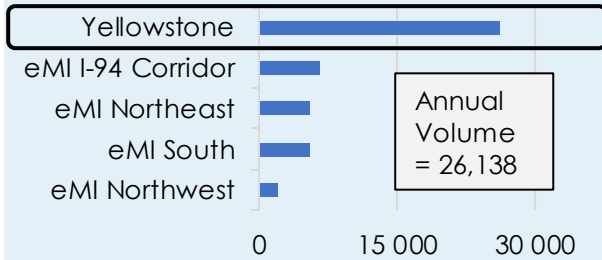


Rosebud Battlefield State Park

# eMI Yellowstone-Billings

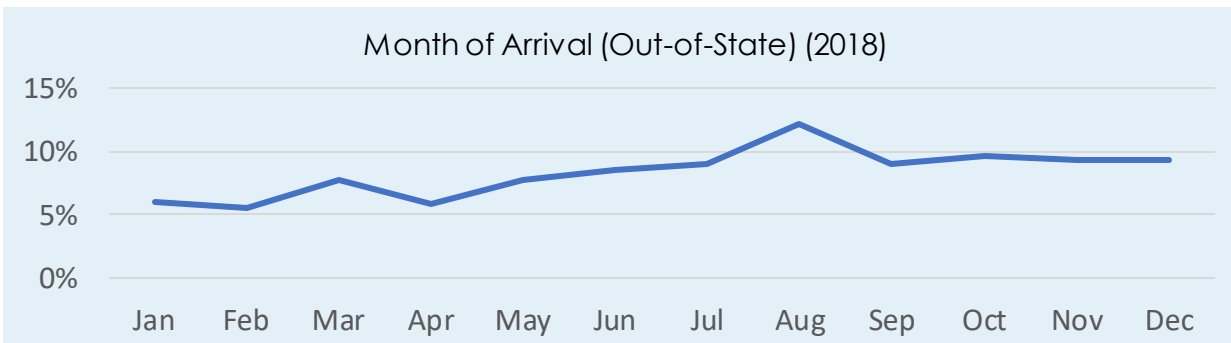
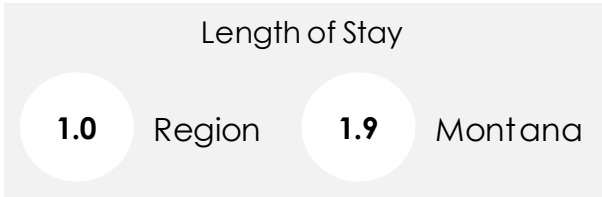
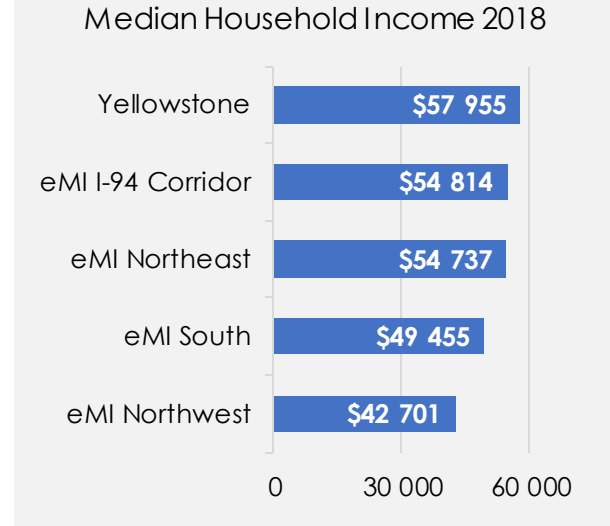


Visitor Volume (County) (Out-of-State) 2018



Population (2018)

Area	Population	% Change from 2010 to 2018
Yellowstone	160,137	8.2%
eMI Northeast	34,580	-
eMI I-94 Corridor	32,129	-
eMI Northwest	30,101	-
eMI South	19,212	-



Key Attractions (Reported in listing sessions)

	Urban Amenities and Activities		Events & Festivals
	The Rimrocks		Pictograph Cave State Park
	Yellowstone County Museum		Pompey's Pillar
	Pioneer Park		ZooMontana

# EXECUTIVE SUMMARY

# Executive Summary

---

This report presents the results of a project conducted to better understand (and look for solutions to) the problem of declining bed tax revenues in eastern Montana. For this work, tourism industry stakeholder listening sessions were held in Billings, Hardin, Terry, Sidney, Glasgow and Lewistown, Montana. The Office of Tourism and Business Development invited key industry stakeholders to attend two-hour listening sessions, which were moderated by Destination Analysts, Inc. and Big Sky Solutions & Strategies. Additional telephone interviews were conducted amongst stakeholders who, for whatever reason, were not able to attend the group sessions. The goals of this research were firstly to understand the region's needs, ambitions and opinions, and to gather ideas from the region's stakeholders for ways to address the situation.

**Regional objectives:** A key object of the research was to understand the goals and ambitions of stakeholders in the region. These were identified as:

- Promote economic development that maintains the integrity of its place
- Raise eastern Montana's profile as a tourism destination
- Connect better with statewide marketing efforts
- Enhance regional marketing efforts
- Develop/redevelop tourism assets and amenities
- Address labor shortages by keeping people in eastern Montana, and attracting new residents

**Eastern Montana's Destination Attributes:** Participants in the listening sessions outlined a broad array of specific attractions and experiences that visitors can have in the destination. These experiences were generally said to be of extremely high quality. Eastern Montana was described as being a tapestry of unique landscapes and scenic beauty, with outstanding outdoor recreational opportunities for travelers to enjoy.

# Executive Summary

---

**Eastern Montana's Challenges:** Eastern Montana's communities were generally reported in these sessions as being economically stressed. There was near unanimous agreement that tourism could play a significant role in ameliorating the problem. The groups reported that the region faces these important challenges:

- Low destination awareness and understanding amongst travelers
- Limited financial and human resources for destination promotion
- Eastern Montana is off the beaten path
- Intense seasonality
- Uneven demand (short periods of high demand followed by prolonged weak demand)
- Lack of amenities and services needed for robust tourism industry performance
- Infrastructure issues
- Challenging access to private lands
- Politics and parochial attitudes
- Lack of customer service, training and support



# Executive Summary

---

**Ideas for Moving Forward:** Participants in the listening sessions (and individual interviews) provided many creative ideas for ways to improve regional tourism performance, and hence the declining bed tax collection situation. These included:

- Create, expand and make available entrepreneurial education resources to assist in the development of new agritourism and ecotourism products
- Optimize current successful traveler segments, specifically hunting, fishing, visiting friends and relatives travel
- Enhance, improve and expand existing travel itinerary and tourism trail content
- Create education-based youth activity programs for the region
- Invest in infrastructure repair and development
- Expand the idea of the Block Management Program as a model for other types of access to private lands (hiking, fishing, camping, cultural attractions, etc.)
- Simplify the tourism grant process
- Encourage more and creative use of peer-to-peer rental services, including for lodging, recreational equipment and guide services
- Use App technology and gamification in attracting visitors to eastern Montana
- Encourage the further development of Native American cultural tourism
- Grow in-state travel to eastern Montana
- Educate residents and frontline hospitality staff on customer service and the area's tourism assets
- Take action to enhance the area's labor force



# REGIONAL OBJECTIVES

The Primary Aspirations and Goals Eastern Montana's Regional Tourism Stakeholders Identified for their Communities

# Eastern Montana's Regional Objectives

The design of this initiative was founded on two main principles. First, that Montana's eastern communities should ultimately decide upon and direct whatever actions are taken to remedy the declining bed tax situation. In a sense, this initiative takes a ground-up approach, with the Department of Commerce's goal being to help each of eastern Montana's zones to generate ideas, decide on a direction and implement changes that they want to pursue. Second, that the zones be primarily self-reliant in the long-term implementation of whatever plans they may decide to implement. The state could potentially provide grants, marketing assistance and coordination assistance to the zones, but in the end, the zones will be responsible for carrying out their plans. With this in mind, the listening sessions began by asking participants to discuss their dreams, goals and aspirations for their communities and region. Across listening sessions and zones there was a tremendous amount of similarity in how participants answered this question. The following six themes describe the essence of what stakeholders report they want for their areas.

- **Promote economic development that maintains the integrity of its place.** Highest on stakeholders' wish list was a demand for smart-growth strategies. They universally reported a desire to encourage regional economic growth through tourism, but also insisted that it be smart, planned growth. A strong consensus was expressed that many communities in the eastern half of the state are struggling, if not dying. Aging populations, and long-term economic decline (plus an accompanying lack of job opportunity) have created a situation where participants shared a serious concern for the future of their communities. Despite this, stakeholders argued that they did not want change that imperiled their way of life; described as being deeply loved and uniquely Montanan. Participant concerns appeared to be centered around over-tourism (bringing too many people into their zones) and development that degrades popular aspects of their communities (like downtowns with chain-stores rather than traditional Montana businesses.)
- **Raise eastern Montana's profile.** A desire to elevate understanding and awareness of eastern Montana as a tourism destination appeared on two levels; within the state, and amongst non-Resident visitors. It was immediately clear that many participants felt that the eastern half of the state is under-served, if not neglected, by those who could influence change in other parts of the Montana. The fact that the listening sessions were even being held seemed to generate optimism and significant enthusiasm in many stakeholders. Also, there was agreement that the eastern half of the state is relatively unknown to non-resident travelers (despite having a tremendous array of tourism product.)





# Eastern Montana's Regional Objectives

---

- **Connect better with statewide marketing efforts.** Not surprisingly, participants reported that they would like an increased level of support to be expressed in Montana's tourism marketing efforts. In general, participants seemed to believe that the state's current marketing focus is primarily on the tourism icons of the West and that additional resources focused on promoting the eastern parts of the state would be welcomed. Additionally, there generally appeared to be an appetite for more coordination with and assistance from the state's tourism marketing agency.
- **Enhance regional marketing efforts.** In addition to the state focusing more of its effort to promote the East, a desire to enhance the marketing done by the zones themselves was expressed. Listening session participants described a region that, from an inventory consumption point of view, is under-utilized. In effect, the belief was that the area is nowhere near its full potential capacity.
- **Develop/redevelop tourism assets and amenities.** A major theme that emerged from these sessions was that the eastern half of the state has a considerable challenge with tourism assets and amenities. This issue was expressed as both a serious need to develop new infrastructure as well as upgrade and repair existing tourism-enhancing assets and amenities. In each of the communities where listening sessions were held, specific examples of needed upgrades were noted. Furthermore, the groups were eager to discuss development ideas they felt would enhance their community's livability and tourism potential. These assets ran the gamut and included signage upgrades, public restrooms, renovated downtown corridors, parks, spaces for public enjoyment, trails, river and lake access points, festival pavilion upgrades, road repairs and visitor centers.
- **Keep people in eastern Montana.** Labor force shortages in rural Montana are well-documented and population dynamics are likely at the root of this issue. The eastern region of Montana is comprised of 23 counties. Over the last eight years, 10 of these counties have lost population. Session participants were aware of this trend, and they frequently expressed the hope that things could be turned around to give young Montanans an economic incentive to stay. As one participant put it, the region needs to develop "something to offer young people." Additionally, the potential to attract new residents through tourism was seen as significant.



# EASTERN MONTANA: DESTINATION ATTRIBUTES & CHALLENGES

# Eastern Montana's Destination Attributes

---

Travel is a highly competitive industry, and contemporary travelers have virtually unlimited options for how and where they spend their travel budgets. Eastern Montana indeed faces stiff competition from a variety of compelling destinations. Existing in a competitive environment does not suggest, however, that eastern Montana does not itself have tremendous potential as a stand-alone destination. While the sense given by participants portrayed a region that on some level has a lack of confidence in its potential, a simple inventory of the experiences available in eastern Montana tells a different story. Eastern Montana clearly already has assets and attributes needed to appeal to a wide array of traveler types. What the region appears to lack is traveler awareness and issues with relatively weak tourism amenities.

Participants in the listening session outlined a deep array of specific attractions and experiences that visitors can have in eastern Montana. These included:

- Native American culture
- Dinosaurs
- Lewis and Clark historical sites
- Events and festivals
- Western history
- Western literature and art
- Agritourism experiences
- Hunting
- Rock hounding/Geology
- Astro-tourism/star-gazing
- Fly-fishing
- Lake fishing
- Ice fishing
- Hiking
- Canoeing and kayaking
- Horseback tourism
- Rodeos
- Motorcycle travel
- Bicycle tourism
- Birding

Not only are these experiences available to visitors, they are often of extremely high quality. A few of the experiences described as such included fly fishing on the Bighorn River, paleontology-related activities, cultural experiences such as the Crow Fair, game bird hunting, and scenic, wide-open roads for cycling and motorcycle touring under Montana's famed Big Sky. In short, eastern Montana was described as a tapestry of unique landscapes and scenic beauty, with outstanding outdoor recreational opportunities for travelers to enjoy.



# Eastern Montana's Challenges

## Eastern Montana's Challenges

Eastern Montana's communities were reported in these listening sessions as being stressed. In fact, several participants referred to towns in the area as "dying." The key issues appear to be economic stagnation, aging populations, low wages and a consequent shortage of labor, even for relatively unskilled jobs. The idea that increased tourism could help this situation by creating jobs, supporting incomes and providing opportunities that would keep young people in the region was understood by group participants. There was near unanimous agreement that tourism could play a significant role in ameliorating this problem. Still, the groups reported that growing tourism revenues in the region faces some important challenges.

- **Low destination awareness and understanding.** The region was reported to be relatively little known by travelers. A consistent desire put forward in the listening sessions was to somehow get the zones' destinations and attractions "on the map" or that the area "needs a thing" (a focal point attraction) to get it noticed. The consensus of the groups was that most travelers do not think of eastern Montana as a destination (low top-of-mind awareness) and know little to nothing about the travel experiences available there.
- **Limited financial and human resources.** The communities and regional marketing organizations have very limited funds to support tourism marketing, develop new or maintain/redevelop existing infrastructure. Expertise in tourism marketing also appears to be limited. In addition, the human resources needed to champion change and steer new development may also be limited, especially in more rural areas. That said, the enthusiasm of participants in the listening sessions was high.
- **Eastern Montana is off the beaten path.** The destinations of this part of the state are relatively difficult to access, as limited transportation options are available to travelers. While Billings airport gives access to the area, travelers will likely need to rent vehicles and possibly drive long distances to access many of the area's attractions.
- **Intense seasonality.** Winter in eastern Montana can be harsh, with only the hardiest of travelers being willing to venture there. This creates a situation where summer industry performance is critical. As one participant put it, "You've got to make your money in the summer and then make it through the winter. A lot of places close down for the winter." Eastern Montana may receive a number of outdoor recreationalists for activities like ice fishing, but the harsh winters and potential for transportation disruption present serious challenges. Additionally, it was suggested that few travelers would know what is available to them in the region, during the winter season.



# Eastern Montana's Challenges

---

- **Uneven demand.** A serious issue facing communities in eastern Montana is having far too much demand during special events, festivals and sporting events, and then not enough during other periods. This issue emerged in all of the markets except Billings, Yellowstone County. The problem is best illustrated by example. The town of Ekalaka hosts the Dino Shindig each year in July. It is an event that can attract many hundreds of visitors each day. These travelers come from around the world. This town though only has a handful of hotel rooms, and visitors are forced to day trip from further away towns. Similarly, Lewistown reports that their city is full of over 5,000 travelers during its Choke Cherry Festival. The city's hotel capacity is nowhere near able to accommodate the potential hotel guests, who again must travel from further out to attend the festival. Finally, cities around the state reported that high school sports tournaments are potentially big business for them. Much of the potential may be lost to the community due to limited room inventory forcing travelers to return home, rather than potentially spend the night.
- **Lack of amenities and services.** Travelers not only need lodging, they need basic amenities such as restroom facilities, grocery stores and restaurants, gas stations, broadband access, emergency services and mobile phone connectivity. Additionally, travelers require other services to allow them to fully experience Montana. These might include professional guides or recreational equipment. In many cases, these services just don't exist in Montana. An example of this situation was described at the Fort Peck Reservoir, which is one of the main attractions in the northeastern region. The lake was referred to as a BYOB (Bring Your Own Boat) lake, as there is very limited number of watercraft rentals (kayaks only). Participants reported that there is a high demand for boat rental and tours, and many travelers ask about the possibilities only to be disappointed. This makes enjoying the lake impossible for travelers who do not own a boat, do not want to travel with their boat, or arrive in Montana by air. Similar stories were told by session participants around the region.
- **Need for infrastructure development.** Across the region it was reported that infrastructure issues limit the industry's potential. These infrastructure needs include:
  - Boat ramps and access to waterways
  - Visitor information centers and kiosks
  - Lack of restrooms
  - Hiking trails
  - Public gathering places
  - Bike and multi-use pathways
  - Parks
  - Signage



# Eastern Montana's Challenges

---

- **Access to private lands.** Outside of lands available to hunters through the FWP/Block Management Program (described below), much of eastern Montana is held by private individuals, and as such availability for public use is limited. In some cases, interesting attractions (historical and archeological sites, water access points, etc.) are held in private hands, and off limits to travelers.
- **Politics and parochial attitudes.** The final challenge to tourism in eastern Montana relates to the feelings and attitude of residents, who apparently are often not comfortable with the idea of tourism. Three basic issues were described by participants:
  - Tourism was described as “a challenge to Montana’s tradition.” For example, many described wanting things to stay as they are.
  - Participants argued that absentee, non-resident and elderly landlords in the downtown areas can be resistant to the change needed to renovate and keep up commercial or retail areas that might attract tourists.
  - It wasn’t clear to participants that residents would view their own towns as tourism worthy. In this case it was argued that “humility can be a vice,” and could thwart attempts to generate community support for tourism promotion.
- **Lack of customer service training and support.** Labor issues are significant across the region. It was noted that customer service and employee training support are needed by businesses.



# EASTERN MONTANA: HUNTING & FISHING

# Eastern Montana: Hunting & Fishing

---

Across all zones, hunting and fishing were seen as key motivators of visitation to eastern Montana. These visitors were described as loyal customers and big spenders. In many ways they are perceived as critical to eastern Montana's tourism's success. Montana as a hunting/fishing destination has several unique characteristics.

- Access to land for hunting is abundant in Montana. In fact, this access is a big differentiator. The state's Block Management Program allows for this access and is reported to be an important factor in the industry's success. Montana provides diverse state lands and block management lands through this FWP/Block Management Program. It was said that "we have great access to hunting lands. Montana took a lead in access, before the land got locked up by outfitters." The block management regime creates incentive for the landowner not to lease out to an outfitter. Montana has effectively worked with landowners to make the Block Management Program successful.
- Montana is said to have more diverse wildlife (birds and big game) than competitive states like North Dakota. Bird hunting is a driver of a lot of tourism, especially in the northern parts of eastern Montana. Wyoming is known as a big game destination that doesn't have the bird hunting of eastern Montana.
- Eastern Montana was described as not having a lot of guides and outfitters to provide guided product. It does have, however, more hunting guides than anything else.
- Eastern Montana was said to have a large variety of quality fishing: reservoirs and stream fishing.
- This region of the state also has notable public and federal land, including the Charles Russell Wildlife Refuge, Custer Gallatin National Forest and the Lewis and Clark National Forest.





# IDEAS FOR MOVING FORWARD

# Ideas for Moving Forward and Entrepreneurial Resources

---

## Ideas for Moving Forward

Participants in the listening sessions and individual interviews provided many creative ideas for ways they (often with the help of the Montana Office of Tourism and Business Development) could improve regional tourism performance, and hence the declining bed tax collection situation. These are outlined following. It should be noted that this is simply a collection of ideas; ones that presumably could be used in a playbook for the zones to adapt and use for their purposes. No attempt to evaluate the potential for success of each is made.

**Entrepreneurial resources/Learning portal.** Eastern Montana appears to have many opportunities for developing new ecotourism and agritourism-related businesses, but the communities appear to lack the confidence, current information and business acumen needed to successfully launch such endeavors. Creating a resource center where entrepreneurs can learn about legal issues, see examples of product development and marketing best practices, and access market data could spur these ventures.

- **Developing agritourism product.** Encouraging the growth of agritourism businesses (such as ranch stays or visits) came up frequently in the listening sessions, but this concept was often met with resistance that seemed to stem from a lack of accurate information. Discussions around developing agritourism opportunities often ended in participants seeming to dismiss or write the potential off due to fears of a worst-case scenario happening. What if someone sues? What if PETA infiltrates the property and causes trouble? While these are, of course, concerns, a resource center that helped entrepreneurs to honestly evaluate risks, understand and evaluate liability insurance and learn about best practices in developing agritourism experiences could be of high value to the tourism industry. It should be noted that in this regard The Department of Agriculture and Montana State University already provide resources, counselling, grants and workshops.
- **Hunting And fishing.** That hunting and fishing is a key tourism driver and motivator for eastern Montana is clear. Making the most of these visitors while they are in the state was suggested as a way to generate additional hotel room nights and visitor spending. The idea was that there are many services that hunters need that lodging facilities (or other businesses) could offer, such as maps, freezers for storing their catch, maps and guidance, kennels/dog sitting services for dogs that might encourage an additional nights stay or more in-market activities. It was stated that eastern Montana doesn't "currently do a good job of appealing to these people." Resources for how to target, message to and develop amenities that appeal to the outfitted hunter who uses the services of a guide—or even absolute DIYers—could help stimulate such business opportunities.

It was suggested that developing resources to teach residents how to create packages, travel experiences and product is important. As one participant put it, "How do we share success?" A resource center that helped with this could catalyze developing product that could take the regional industry to a new level.



# Travel Itinerary Development and Enhancing Tourism Trail Concepts

---

**Travel Itinerary development.** Eastern Montana clearly is capable of providing travelers with an array of desirable experiences for stand-alone vacations. Current promotional efforts could be supplemented with impactful, best marketing practice-based itineraries that both sell the idea of an eastern Montana trip and provide travelers with incentive to travel around the region and explore its assets. It was believed that this would be one way to begin to grapple with the lack of awareness and understanding of eastern Montana’s tourism assets discussed earlier in this report. The potential seems to be unlimited and could touch on many traveler types, such as:

- Family travel experiences
- Native American cultural exploration
- Western history & rodeo
- State parks
- Agritourism experiences
- Hiking
- Camping
- Boating and water-sports
- Rock hounds/Geology
- Dinosaur enthusiasts
- Astro-tourism/Stargazing
- Birders
- Other niche markets

**Tourism Trail concepts** such as the Montana Dinosaur Trail, Central Montana Pie Trail or the Montana Brew Trail could also be enhanced, improved or expanded, as well. The current execution of these concepts (while widely appreciated by the region’s stakeholders) could be improved. Enhanced collaboration, the adaption of best practices and use of newer technology in this area appear to have great potential. Being more digital, video-focused and APP distributed could make these trails look far more compelling to the modern tourist.



# Education-Based Youth Activity Programs/Fun Challenges

---

A concept was offered up that contemporary parents want much more for their children than what a traditional vacation might have to offer. In a sense, it was argued that many parents are highly focused on providing their children with learning experiences--and even other demonstrable achievement markers. Eastern Montana would seem to offer a tremendous array of potential learning experiences that could be packaged into activity-based trips or fun challenges. The possibilities are nearly limitless, but such programs could focus on any one (or combinations of) concepts such as:

- Paleontology/Dinosaurs
- Native American culture
- Astrotourism
- Agritourism
- State Parks programs
- Voluntourism
- Lewis and Clark Expedition history
- Western history
- Wildlife

These potential programs could be designed to create a fun, socially engaging set of activities and rewards for participants that would have them traveling around the eastern part of the state, either on a single trip or on several.

## Ideas and inspiration

Concepts and models for this type of program would need to be developed, but three existing programs that might serve as inspiration are noted below.

<https://sixpackofpeaks.com/>

<https://missouribreaks.org/about-us/education/education-programs/>

<https://www.adventurescrosscountry.com/>



# Infrastructure Development (1 of 3)

---

**Infrastructure development.** It was said by participants that “tourism infrastructure is our greatest weakness.” Throughout the sessions, a clear theme emerged of eastern Montana lacking adequate infrastructure to grow its tourism offerings. One participant described the situation as “It’s easy to be a tourist in Europe, it is not easy in Montana,” referring to the logistical difficulties inherent in traveling the eastern half of the state. These infrastructure issues, needs and deficits were described as including:

- Transportation systems (buses, airports, train service)
- Signage
- Road repairs and enhancements
- Public toilets
- Parks
- Public gathering spaces/performance venues
- River and lake access points
- Multi-use trail systems (like Lewistown)
- Hiking trails
- Commercial establishments (hotels and restaurants)
- Meetings venues



## Infrastructure Development (2 of 3)

---

The need for infrastructure investment was described in many ways. Here are some specific examples brought up by the groups:

- Participants around eastern Montana mentioned that a public trail system in their town like that of Lewistown would be a great lift for their communities.
- Similarly, bike tourism was described as having great potential if amenities to support these visitors could be developed. The National Rails to Trails program was noted as a model the state should look at.
- In Sidney, the Missouri River was seen as having “great potential,” but unfortunately “there is virtually no access.” The access points that exist were described as being degraded and unusable, making it hard to promote.
- In Hardin, the difficulty of enhancing Native American tourism by developing group tours in the area due to a lack of public restroom facilities was discussed. Despite a high level of consumer interest, it quite simply is seen as a challenge to take a group out to an area where there were no toilet facilities.
- Fort Peck Lake itself was mentioned as “the only actual tourism destination” in the area. Participants argued that “if we could keep adding attractions there we might get it up to critical mass for tourism.” The lake was described as needing more marinas, a modern hotel, an outdoor learning center and a venue to accommodate large groups.
- Planning is needed to address age and infrastructure issues of historic structures and buildings, so that new businesses can afford to be successful in those buildings.
- Sidewalk repairs are needed, so all walkers can walk on the sidewalks instead of the middle of the street. Currently this may be the private individuals' responsibility to maintain sidewalks. It would help to address costs to support business owners' needs in this regard.
- The Fort Peck tribe is looking into developing lodging options on the reservation.



## Infrastructure Development (3 of 3)

---

The state's grant programs generated significant interest in the groups, and the sense was that there is a large appetite for financial assistance in improving the area's tourism infrastructure.

**Going beyond the BMP.** It was stated in the conversations that Montana is a great case study for allowing individuals access to private lands using the Block Management Program. In theory, this concept could also be used as a model for other types of access (hiking, fishing, camping, cultural attractions, etc.) to private lands.

**Simplify the grant process.** State resources to help promote tourism are understood to exist, but the opinion was expressed that most people don't know how to access grants and the process of doing so is arduous. In the words of one participant "it never ends," with ongoing requirements for reporting and statistical submissions.



# Regional Marketing Assistance and Regional Information Sharing

---

**Regional marketing assistance.** Destination marketers at the regional and individual town level in eastern Montana could be provided additional assistance. Their budgets are extremely limited as is the professional expertise needed to plan and execute cutting-edge marketing programs.

**Regional information sharing.** A consistent theme expressed in the sessions was a need for coordination among the regional tourism industry professionals. There was widespread support for working together to promote the area, and the importance of this coordination was well understood. However, participants seemed to feel that the status quo is that they for the most part, work on islands, and communication with others specifically related to tourism issues can be challenging. Putting in place systems for communication and sharing would likely be met enthusiastically. Still, changing habits is hard and this might be a difficult issue to correct. Even those responsible for reaching out to the industry have issues. For example, the stakeholder responsible for the regional events calendar in Glasgow said to the group, “It’s hard to get events from you guys.” Overall, there seemed to be a consensus that reaffirming with zones how to form partnerships and draw people to each others' communities was needed.





# Peer-to-Peer Service Development

---

**Peer-to-peer service development.** One extremely promising potential way to immediately boost bed tax revenues is the use of peer-to-peer sharing services. Given the situation described earlier in this report, savvy use of the sharing economy could potentially yield great benefits to eastern Montana. As the area has severe issues with seasonality and uneven levels of room demand, it seems unlikely that market forces alone will generate more lodging capacity or other services that could provide recreational equipment rental to visitors. These peak demand periods will continue to see lost potential revenues. Peer-to-peer sharing services, however, seem almost tailor-made to ameliorate a situation like this. In periods when demand for rooms exceeds local capacity, promoting a peer-to-peer solution (e.g., airBnB) could be used to capture more room nights, generate bed tax and other visitor spending in the destination. The sharing economy isn't limited to lodging. It would also be possible to develop ways or use existing services to share recreational equipment, such as bikes, snowmobiles, boats, kayaks, camping gear or fishing equipment—thus relieving the visitor of the burden of bringing this equipment with them.

- **Lodging.** A fun idea emerged in the Lewistown session. It was noted that during the annual Choke Cherry Festival, many travelers can't find hotel rooms and need to travel long distances on a day trip to attend. Many of the city's residents own campers, however, and the group suggested (not so playfully) that they could all be lined up in a parking lot and rented out to visitors. This exact idea may not be logistically feasible, but it effectively highlights the potential of these sharing services.

Airbnb was also suggested as a very positive choice for bird hunters, whose dogs need room. Some hotels will help with game cleaning if they have facilities, but private homes could also offer these support services for an added fee.

- **Recreational equipment.** As noted, eastern Montana is said to have a severe lack of rental services for recreational equipment. Sharing services could again provide these items to visitors, rather than having to bring them to the state.
- **Guide services.** As mentioned previously, it was noted in the listening sessions that eastern Montana has many hunting guides, but few other guides to offer assistance to travelers. Many sharing services now allow locals to sign up to guide visitors. Services like tour by locals (<https://www.toursbylocals.com/>) might be used to provide these services and allow local residents to profit from their knowledge of the area.



# App Technology and Native American Tourism

---

**App technology – Gamification.** Session participants also brought up the idea of geo-caching and the use of phone apps to serve as guides—or even other potential, but not-yet-thought-of resources for travelers—to convince travelers to spend more time in the region, get off the Interstate and explore, or follow itineraries. The conversations around this topic were not particularly deep, but that probably was because participants understood the potential of such technology, but were not personally familiar with its many potential uses.

**Development of Native American tourism.** A sentiment expressed universally in the listening sessions was that there is a tremendous potential to develop Native American cultural tourism in eastern Montana. Area stakeholders reported that visitors consistently express a high level of interest in this type experience. To the degree that Native American communities arrive at a consensus that they want to develop tourism, their potential seems sky-high. The powwow circuit was especially noted as being of interest, with the Crow Fair being held up repeatedly as an outstanding model for this type of event. However, as one participant put it, “infrastructure is an obvious problem, but one thing needs to happen to make [pow wows] more accessible: visitors need to know they are welcome and celebrated when they come. But there is an apprehension that they will not be welcomed by the tribal community.”

The assets of the Native American community to market as tourism destinations are compelling. Those that were mentioned in the sessions include:

- Teepee rental
- Powwow events
- Horse tours
- Rodeos
- Reenactments
- Hunting/fishing outfitters
- Historical tours

In the Hardin group meetings, the idea of developing what would effectively be a destination marketing organization for Crow Country came up. The groups would push to develop local entrepreneurship, as well as income and job creation. It was reported that a committee was in the works and that the tribe needed to develop a brand, such as “Visit Crow Country.”



# In-State Travel and Labor Force Enhancement

---

**Grow in-state travel.** Travel by Montana residents was seen as a significant opportunity market for the communities and attractions in eastern Montana. Day trips, short overnight trips, business tourism and corporate retreats with employees were all mentioned as potential ways to drive incremental room nights in the area. Many of the issues described in this report impact this market, too. For example, a portion of the uneven demand issue results from in-state residents. Festivals and sporting events are apparently frequented by many Montanans who, lacking realistic options for lodging, will make a long drive back home after the event—a lost opportunity for these communities.

**Educate residents and frontline staff.** A frequent topic of conversation in the sessions was the need to develop something like a “Super Host Program,” a way to educate locals and industry staff in customer service. It was argued that educating these people about things to see and do in the region is critical. One participant said he expected his front desk staff, rather than offering the inquisitive tourist ideas for activities in the community, to say something like, “there’s nothing to do here. You should go to Glacier.” It was agreed that training locals in up-selling and cross-selling could be very helpful. However, it was clear that the groups felt the reality of making this happen would be a challenge. The sense seemed to be that, the way such programs have been done in the past, “those who need the training the least are the ones who take advantage of it.” High staff turn-over is also problematic. Most likely, such a program would need to be creative, on-going and significant community buy-in would be needed.

**Labor force enhancement.** Recruiting and retaining a skilled workforce was said to be challenging in eastern Montana, and a significant inhibitor of economic growth. In short, the situation was described as there are not enough workers and retention is difficult. A story was shared about a motel owner who only used half his room inventory because he can’t find anyone to provide maid service to the remaining rooms. What an initiative to lessen the labor force problem would look like was unclear to the groups. However, two thoughts were shared that may be helpful.

- Participants were adamant that the Montana lifestyle is unique and valuable. In fact, the lifestyle aspect was described as “unrivaled.” The suggestion was that this could be a key selling point in attracting a work force.



## Bringing in Friends and Family

---

**Encourage VFRs and their hosts to have some fun.** As in any destination, visiting friends and relatives (VFRs) form a sizable share of visitor volume. The idea was suggested that the region could market to these visitors to encourage them to plan their trips around events and activities that would lengthen their stays and get them out into the community spending money. A potential side effect of this activity would be supporting the halo effect and possibly encouraging people to consider moving to eastern Montana.

**Encourage “significant others” to visit.** Much of eastern Montana’s visitor traffic was thought to be travel that may not include a companion or significant other (i.e., hunting trips, business travel, etc.) Eastern Montana was described as not taking advantage of the potential to have visitors bring significant others and encouraging longer stays for those already coming. It was thought that product offerings for spouses to enjoy while their partner hunts or does business could potentially be lucrative. Currently, these services may not yet exist in many areas of the state.



# APPENDIX: SUPPLEMENTAL REGIONAL DATA

(DATA ON THE FOLLOWING PAGES IS FROM THE U.S. BUREAU OF THE CENSUS. IT IS PROVIDED HERE A RESOURCE FOR THOSE INTERESTED IN EXPLORING DIFFERENCES BETWEEN THE EMI ZONES.)

Figure 1: Northwest Montana

	Fergus County, Montana	Phillips County, Montana	Musselshell County, Montana	Garfield County, Montana	Blaine County, Montana	McCone County, Montana	Petroleum County, Montana
Population estimates, July 1, 2018	11,113	4,074	4,651	1,268	6,807	1,675	513
Population, percent change - April 1, 2010 (estimates base) to July 1, 2018	-4.10%	-4.20%	2.50%	4.90%	4.90%	-3.40%	5.10%
Persons under 18 years, percent	21.10%	23.90%	19.10%	23.40%	30.30%	20.90%	18.40%
Persons 65 years and over, percent	23.60%	21.50%	25.20%	22.70%	15.10%	25.00%	24.10%
White alone, percent	96.10%	85.90%	93.60%	98.50%	46.60%	95.60%	95.80%
American Indian and Alaska Native alone, percent	1.60%	9.60%	1.90%	0.50%	50.10%	1.30%	1.00%
Foreign born persons, percent	1.80%	1.20%	2.00%	0.00%	1.30%	0.80%	1.50%
Housing units	5,899	2,352	2,702	864	2,850	1,022	334
Median value of owner-occupied housing units	\$133,700	\$117,800	\$161,400	\$116,300	\$85,800	\$111,900	\$112,000
Households	4,953	1,791	2,073	451	2,314	720	206
Households with a computer, percent	83.80%	79.30%	81.40%	77.20%	76.20%	76.10%	83.50%
Households with a broadband Internet subscription, percent	72.60%	67.40%	73.90%	70.10%	63.70%	66.30%	73.80%
Bachelor's degree or higher, percent of persons age 25 years+	29.50%	18.10%	15.00%	17.50%	20.70%	17.40%	25.30%
Total accommodation and food services sales (\$1,000)	18,534	4,688	NA	1,075	2,557	596	NA
Total retail sales, 2012 (\$1,000)	150,273	39,195	41,964	13,056	46,892	24,790	NA
Total retail sales per capita	\$13,141	\$9,495	\$8,995	\$10,354	\$7,017	\$14,574	NA
Mean travel time to work (minutes), workers age 16 years+	12.4	19.5	30.5	12	15.5	16.7	14
Median household income (in 2017 dollars)	\$47,110	\$42,101	\$38,156	\$47,188	\$35,506	\$46,193	\$46,429
Persons in poverty, percent	12.70%	14.40%	17.20%	16.40%	26.20%	14.70%	14.10%
Total employer establishments	443	135	115	25	140	51	12
Total employment, 2016	3,267	821	876	130	987	351	29
Population per square mile	2.7	0.8	2.4	0.3	1.5	0.7	0.3
Land area in square miles	4,339.80	5,140.04	1,868.16	4,675.36	4,227.55	2,643.17	1,654.87

Source: U.S. Bureau of the Census

Figure 2: Northeast Montana

	Richland County, Montana	Roosevelt County, Montana	Valley County, Montana	Sheridan County, Montana	Daniels County, Montana
Population estimates, July 1, 2018	10,913	11,059	7,437	3,424	1,747
Population, percent change - April 1, 2010 (estimates base) to July 1, 2018	12.00%	6.10%	0.90%	1.20%	-0.20%
Persons under 18 years, percent	25.60%	33.80%	22.30%	20.80%	21.50%
Persons 65 years and over, percent	14.30%	10.70%	23.10%	21.70%	25.90%
White alone, percent	93.50%	35.50%	86.60%	94.20%	94.60%
American Indian and Alaska Native alone, percent	2.30%	59.80%	9.40%	2.20%	2.80%
Foreign born persons, percent	2.20%	1.30%	1.90%	2.10%	3.10%
Housing units	5,243	4,134	4,893	2,166	1,127
Median value of owner-occupied housing units	\$213,000	\$116,400	\$135,600	\$146,500	\$123,500
Households	4,523	3,203	3,432	1,661	876
Households with a computer, percent	84.30%	71.80%	84.50%	87.10%	82.90%
Households with a broadband Internet subscription, percent	74.70%	64.70%	71.30%	76.00%	72.50%
Bachelor's degree or higher, percent of persons age 25 years+	19.70%	15.50%	21.10%	20.80%	23.00%
Total accommodation and food services sales (\$1,000)	38,445	13,723	16,425	6,904	D
Total retail sales, 2012 (\$1,000)	215,831	159,204	158,665	61,058	51,376
Total retail sales per capita	\$19,966	\$14,570	\$21,141	\$17,055	\$28,766
Mean travel time to work (minutes), workers age 16 years+	16	14.1	15.4	14.6	11.4
Median household income (in 2017 dollars)	\$66,572	\$39,219	\$55,267	\$51,940	\$53,591
Persons in poverty, percent	8.70%	26.10%	11.80%	11.00%	10.20%
Total employer establishments	528	214	274	169	68
Total employment, 2016	5,841	1,994	2,314	950	611
Population per square mile	4.7	4.4	1.5	2	1.2
Land area in square miles	2,084.14	2,354.79	4,925.82	1,677.08	1,426.11

Source: U.S. Bureau of the Census

Figure 3: I-94 Corridor Montana

	Custer County, Montana	Dawson County, Montana	Rosebud County, Montana	Wibaux County, Montana	Prairie County, Montana	Treasure County, Montana
Population estimates, July 1, 2018	11,586	8,680	9,063	1,034	1,087	679
Population, percent change - April 1, 2010 (estimates base) to July 1, 2018	-1.00%	-3.20%	-1.90%	1.70%	-7.80%	-5.40%
Persons under 18 years, percent	21.70%	22.30%	29.10%	22.40%	18.40%	19.00%
Persons 65 years and over, percent	19.20%	18.80%	15.00%	23.40%	30.70%	28.10%
White alone, percent	94.50%	94.80%	57.00%	97.30%	94.30%	93.80%
American Indian and Alaska Native alone, percent	2.20%	2.10%	38.70%	0.80%	0.80%	2.90%
Foreign born persons, percent	1.40%	1.60%	1.30%	2.80%	0.60%	0.80%
Housing units	5,698	4,442	4,181	562	679	432
Median value of owner-occupied housing units	\$157,000	\$154,300	\$118,600	\$110,100	\$100,700	\$105,500
Households	4,875	4,045	3,205	497	549	365
Households with a computer, percent	84.00%	86.10%	76.10%	72.80%	77.20%	86.30%
Households with a broadband Internet subscription, percent	75.90%	75.00%	56.50%	53.70%	69.00%	64.40%
Bachelor's degree or higher, percent of persons age 25 years+	22.40%	19.80%	18.80%	22.70%	20.50%	23.10%
Total accommodation and food services sales (\$1,000)	28,523	25,724	10,796	1,484	593	399
Total retail sales, 2012 (\$1,000)	256,660	151,788	56,367	6,264	6,484	NA
Total retail sales per capita	\$21,590	\$16,411	\$5,999	\$5,926	\$5,604	NA
Mean travel time to work (minutes), workers age 16 years+	12.8	17.4	12.8	18.6	12.8	17.6
Median household income (in 2017 dollars)	\$53,050	\$59,622	\$54,709	\$47,132	\$50,850	\$42,454
Persons in poverty, percent	13.00%	10.70%	17.30%	10.80%	12.00%	11.70%
Total employer establishments	424	333	178	36	36	19
Total employment, 2016	4,415	2,740	2,429	127	146	52
Population per square mile	3.1	3.8	1.8	1.1	0.7	0.7
Land area in square miles	3,783.36	2,371.87	5,010.40	889.27	1,736.74	977.4

Source: U.S. Bureau of the Census



Figure 4: South Montana

	Big Horn County, Montana	Powder River County, Montana	Fallon County, Montana	Carter County, Montana
Population estimates, July 1, 2018	13,338	1,716	2,920	1,238
Population, percent change - April 1, 2010 (estimates base) to July 1, 2018	3.70%	-1.50%	1.00%	6.70%
Persons under 18 years, percent	34.30%	16.80%	27.10%	20.00%
Persons 65 years and over, percent	12.40%	25.50%	16.90%	25.00%
White alone, percent	29.50%	95.30%	96.70%	97.40%
American Indian and Alaska Native alone, percent	66.40%	1.90%	0.70%	1.00%
Foreign born persons, percent	0.80%	1.40%	1.60%	0.10%
Housing units	4,734	1,032	1,639	827
Median value of owner-occupied housing units	\$100,000	\$110,900	\$154,200	\$97,900
Households	3,710	764	1,241	565
Households with a computer, percent	73.30%	85.30%	87.60%	76.10%
Households with a broadband Internet subscription, percent	59.10%	68.60%	74.30%	70.40%
Bachelor's degree or higher, percent of persons age 25 years+	17.60%	25.60%	15.90%	16.60%
Total accommodation and food services sales (\$1,000)	17,214	2,873	6,928	D
Total retail sales, 2012 (\$1,000)	101,447	24,577	34,695	14,676
Total retail sales per capita	\$7,767	\$13,940	\$11,473	\$12,469
Mean travel time to work (minutes), workers age 16 years+	18.1	16.9	13.1	18
Median household income (in 2017 dollars)	\$47,276	\$51,136	\$56,806	\$45,347
Persons in poverty, percent	26.80%	12.20%	9.10%	12.90%
Total employer establishments	211	71	150	33
Total employment, 2016	2,365	309	1,036	151
Population per square mile	2.6	0.5	1.8	0.3
Land area in square miles	4,995.46	3,297.30	1,620.77	3,340.75

Source: U.S. Bureau of the Census

Figure 5: Yellowstone Billings Montana

	Yellowstone County, Montana
Population estimates, July 1, 2018	160,137
Population, percent change - April 1, 2010 (estimates base) to July 1, 2018	8.20%
Persons under 18 years, percent	23.60%
Persons 65 years and over, percent	16.50%
White alone, percent	90.80%
American Indian and Alaska Native alone, percent	4.80%
Foreign born persons, percent	2.10%
Housing units	71,213
Median value of owner-occupied housing units	\$210,500
Households	64,020
Households with a computer, percent	88.90%
Households with a broadband Internet subscription, percent	80.30%
Bachelor's degree or higher, percent of persons age 25 years+	30.20%
Total accommodation and food services sales (\$1,000)	452,246
Total retail sales, 2012 (\$1,000)	3,272,215
Total retail sales per capita	\$21,544
Mean travel time to work (minutes), workers age 16 years+	18.4
Median household income (in 2017 dollars)	\$57,955
Persons in poverty, percent	10.30%
Total employer establishments	5,614
Total employment, 2016	70,372
Population per square mile	56.2
Land area in square miles	2,633.29

Source: U.S. Bureau of the Census