

Application Summary

Application: FY25 DMO Plan

Applicant: Glacier Country Regional Tourism Commission

Funding opportunity: FY25 DMO Plan

Application Responses

Organization Name: Glacier Country Regional Tourism Commission

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State: MT

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Funding Opportunity: FY25 DMO Plan

Amount Requested: 4975000

General Description Information

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

1a. Destination:

Glacier Country is an extraordinary place of exquisite landscapes, small-town allure, rich history, American Indian cultures and world-class recreation. More importantly, it is a place where the residents are genuine and warmly welcome visitors who have a hearty appetite for adventure and a respect for people, cultures, sense of place, lifestyle, natural environment and heritage.

As Montana's westernmost region, Glacier Country encompasses 75+ communities within the eight counties of Flathead, Glacier, Lake, Lincoln, Mineral, Missoula, Ravalli and Sanders.

- **Geographic size:** 22,000 square miles
- **Population:** 380,000
- **Largest communities:** Missoula, Kalispell, Whitefish and Hamilton
- **Average February temperatures:** High of 36 degrees Fahrenheit and low of 16 degrees Fahrenheit
- **Average July temperatures:** High of 82 degrees Fahrenheit and low of 48 degrees Fahrenheit
- **Tribal Nations:** Western Montana's Glacier Country is on the traditional, ancestral territories of the Séliš (Salish or "Flathead"), Ksanka (Kootenai), Qlispé (upper Kalispel or Pend d'Oreille), and Amskapi Piikani (Blackfoot) peoples.
- **Rural Travel Corridors:**

- Bitterroot Valley: Lolo, Florence, Stevensville, Victor, Corvallis, Hamilton, Darby, Conner, Sula
- Blackfoot Corridor: Bonner, Clinton, Greenough, Ovando
- Clark Fork Corridor: Dixon, Paradise, Plains, Thompson Falls, Trout Creek, Noxon, Heron, Hot Springs
- East Glacier Corridor: Browning, Cut Bank, East Glacier Park, Heart Butte, St. Mary, Babb
- Flathead Corridor: Arlee, Ravalli, St. Ignatius, Moiese, Charlo, Ronan, Pablo, Polson, Big Arm, Elmo, Dayton, Proctor, Rollins, Lakeside, Somers, Bigfork
- Glacier Park Surrounding Area: Babb, Columbia Falls, Coram, East Glacier Park, Essex, Hungry Horse, Martin City, Polebridge, St. Mary, West Glacier
- I-90 Corridor: Frenchtown, Huson, Alberton, Superior, St. Regis, De Borgia, Haugan, Saltese
- Northwest Corridor: Marion, Kila, Libby, Troy, Yaak, Rexford, Eureka, Fortine, Trego, Stryker, Olney
- Seeley Swan Corridor: Bigfork, Ferndale, Swan Lake, Condon, Seeley Lake

1b. Strengths:

Our strengths are our natural landscape, people, communities, history, cultures, quality of life, services and experiences. Our opportunities are built upon these strengths taking into consideration our wants, needs and desires of the people who call Glacier Country home. We are working with each community to determine what those opportunities are based on seasonality and capacity.

Spectacular unspoiled nature

- Glacier National Park
- Rocky Mountains, with several smaller mountain ranges
- Geological features (Glacial Lake Missoula)
- Wildlife
- CSKT Bison Range
- Montana state parks
- National forests
- Bob Marshall Wilderness Complex (Great Bear, Bob Marshall and Scapegoat wildernesses)
- Cabinet Mountains Wilderness
- Selway-Bitterroot Wilderness
- Mission Mountains Wilderness
- Rattlesnake National Recreation Area & Wilderness
- Flathead Lake
- Lakes and rivers
- International Dark Sky Park designation, stargazing, northern lights

Vibrant and charming small towns

- Art galleries
- Artisan tours and events

- Explorer and national historic trails: Lewis and Clark, David Thompson, John Mullan, Nez Perce Trail, Pacific Northwest Scenic Trail
- Historic “red buses” of Glacier National Park
- Historic sites
- Historic St. Mary’s Mission
- Main-Street businesses
- Museums
- Live music
- Railroad history
- Shared border with Canada
- Live theater
- Two American Indian reservations/native cultures and history

Experiences

- Agricultural experiences
- American Indian cultures
- ATVing
- Biking and cycling
- Birding
- Boating
- Camping and RVing
- Destination learning
- Dog sledding
- Downhill skiing
- Festivals/music
- Fishing
- Golfing
- Hiking
- Historic sites
- Horseback riding
- Kayaking and canoeing
- Llama trekking
- Montana state parks
- Motorcycle touring
- Mountain biking
- Nordic skiing
- Pow wows
- Public art
- Rafting
- River surfing
- Rodeos

- Running events and competitions
- Scenic flights
- Skijoring
- Sleigh rides
- Snowmobiling
- Sportsman adventures
- Stand-up paddleboarding
- Stargazing

Hospitality

- Blackfeet Community College
- Breweries
- Cideries
- Dining
- Distilleries
- Farmers markets
- Farm-to-table restaurants
- Flathead Valley Community College
- Meeting and convention spaces
- Missoula College
- Salish Kootenai College
- Special event venues (entertainment)
- University of Montana
- Visitor information centers
- Wedding venues
- Wineries

Abundant lodging and camping (independent, brand and boutique)

- Bed-and-breakfasts
- Bicycle accommodations
- Boutique accommodations
- Cabins
- Camping/RV
- Chalets
- Condominiums
- Geodomes
- Glamping
- Hostels
- Hot springs
- Hotels and motels
- Lodges

- Ranches
- Resorts
- Tiny homes
- Teepees and yurts
- Treehouses
- University residence halls
- Vacation homes and short-term rentals

1c. Opportunities:

Our destination benefits from a culture of collaboration among its many partners who work together to build a sustainable destination that values resident quality of life as much as visitor quality of experience. These public and private partners include—but are not limited to—our historical heritage sites, arts and culture organizations, agritourism entities, businesses that locally source and produce products and services, transportation entities, destination marketing organizations, local and state governments, Tribal Nations, the University of Montana, the U.S. Forest Service, the U.S. Fish & Wildlife Service, the Bureau of Land Management, Montana State Parks, Glacier National Park, conservation associations and all those who reside here. We wish to better partner with governments and other local leaders to provide them with the support they need to implement policies and solutions that lead to healthier destinations. Our destination stewardship efforts seek to develop and strengthen these relationships.

We help community leaders, managers and policymakers identify, develop and implement best practices for sustainable tourism development based on their communities' wants and needs. We serve as a trusted advisor by offering strategic guidance and recommendations and help community leaders plan for sustainable tourism growth and implement policies that preserve their cultures and way of life. Together, we partner to achieve a common goal of sustainable tourism development by helping to bring together local governments, community leaders, businesses and Non-Governmental Organizations to tackle major challenges collaboratively.

Our inclusive strategic plan seeks to mitigate adverse impacts and strengthen the ability of local communities to respond to natural disasters, economic downturns and other unforeseen events.

Our seasonality provides natural fluctuations in traveler numbers depending on location. Overall, our region's high season is June through September. However, there are some variations throughout our eight-county region. While there are challenges in areas with more visitors, there are opportunities for growth in those with fewer.

A favorite activity for locals and visitors is the many special events and festivals that occur across the region. These events bring prosperity to the economy, improve the livelihood of local communities and create a positive image of our destination. They also provide opportunities to appreciate our history, cultures, customs, artisans, agriculture production, musicians, thespians, athletes, culinary scenes and craft beverages. We are fortunate to have an array of natural and human-made venues to serve as backdrops for all.

1d. Potential Challenges:

In 2024, we revisited our communities—holding eight meetings, one for each county—sharing the stewardship plan and listening to challenges and opportunities. Through our community engagement program, we continue to stay informed and engage with partners on the latest issues and leverage available resources when possible and appropriate. These resources include the launch of our new brand; accuracy in our brand messaging and imagery used; staying abreast of new marketing trends and opportunities; maintaining a positive tone and message in our publicity and social media efforts; working with our partners to understand the concerns and impacts our industry has at a local, statewide and national level; and assisting financially, when possible, while knowing that our ultimate mission is to create demand for the tourism product our businesses and communities supply.

Identified Challenges

1. Diminishing resident sentiment toward tourism and new residents – The warm hospitality Montanans provide to our visitors is part of the brand for Western Montana’s Glacier Country. In 2023, data showed that more than 30% of residents feel there are too many visitors during our peak season, which impacts how welcome our visitors feel. Even more challenging is that residents have difficulty differentiating between new residents and visitors. Visitor-related issues pose short-term challenges. New residents pose longer-term ones and are seemingly enhancing negative perceptions of visitors. 2023 lodging, visitor spending, and geolocation data indicate the number of visitors and new residents moving to Glacier Country has leveled out. Anecdotally, we are hearing confirmation from our communities. We are anxious to see the latest results from a resident sentiment survey being conducted by the Institute for Tourism and Recreation Research (ITRR).
2. Community capacity – Available workforce and affordable housing remain a problem, especially during peak visitation months. Our businesses are often overwhelmed, which makes providing a consistent quality of service difficult; this can negatively impact the quality of the visitor experience. It can also decrease the ability of residents to enjoy their own community.
3. New recreationists and poor visitor behavior – Some of our region’s new visitors and residents are unfamiliar with practices many of us take for granted. Educating visitors about recreating responsibly in Western Montana is paramount to the success of a sustainability plan and improving unwelcome and uneducated behavior.
4. Affordable housing – While visitor growth, in-migration and inflation have leveled out, affordable housing continues to be challenging. Low housing inventory, high housing prices, high interest rates, and property taxes continue to impact affordable housing both in rural and urban locations in the region. This directly impacts the cost of living and the available workforce.
5. Workforce shortages – Restaurants, hotels and many other businesses in the hospitality industry are still working below capacity due to lack of staff. This can create a poor visitor experience and add to capacity issues in our communities. Caps and average appointment wait times on H-2B and J1 visas remain high, making it much more difficult for Montana businesses to hire nonimmigrant workers for the purpose of temporary employment in the United States.
6. Vehicle reservation system awareness in Glacier National Park – It is very important that we all help

build awareness of the vehicle reservation system in Glacier National Park, which thus far has changed every year. Visitors who show up unaware of the system will have a poor experience. The system is also an opportunity to disperse visitors throughout the region.

7. Overcapacity visitation of Glacier National Park during non-reservation hours – Although the park is accessible without a vehicle reservation before 6 a.m. and after 3 p.m., these areas are still experiencing capacity issues. Visitors may be turned around or unable to access these areas of the park during peak visitation season, creating a poor experience.
8. Recovery of international travel – International long-haul travel continues to recover, and our region continues to see an increased number of visitors from abroad. International visitors, more often than not, utilize a U.S. receptive tour operator to book all of their travel for ease and logistics. However, Glacier National Park vehicle reservations require that individuals obtain their own and cannot be purchased by a third party. Between the language and time differences to access recreation.gov, this is becoming confusing and frustrating for international travelers and may cause them to seek other national parks that don't have reservation requirements. Additionally, our region remains expensive compared to other parts of the world competing for these international visitors.
9. Recovery of meetings and conventions – The meetings and convention industry has seen a near complete recovery. Meeting planners sourcing Western Montana with more RFPs (requests for proposal) are increasing. The booking windows are lengthening, giving our convention hotels and incentive properties more opportunities, especially into the shoulder seasons. Short booking windows do remain a challenge for our incentive and higher-end properties. High travel costs, including transportation and lodging, are a bit of a hindrance.
10. Social Inclusion – Social inclusion is a key component of tourism sustainability. Advancing social inclusion initiatives within the travel and tourism industry is key to strengthening organizations by bringing new ideas, perspectives and open-mindedness to the forefront. Humanizing societal issues can unlock untapped potential, drive innovation and productivity, and create a more welcoming visitor experience for people of all backgrounds and abilities. Elevating its importance and ensuring it is woven into the core of the industry is vital for the future of travel and our workforce. It is essential for our future growth and success to support programs that increase diversity and upward mobility across all sectors of the industry.
11. Airline challenges – Commercial airline capacity saw strong growth in 2023. The high cost of airfare and staffing shortages remain an issue. The Missoula Montana airport has completed Phase 1 of its construction and has begun Phase 2, and Glacier Park International Airport has completed Phase 1 of its expansion.
12. Climate change/changing landscape/weather – Climate change threatens the natural landscapes and ecosystems tourism relies on. The greenhouse effect on the melting glaciers in Glacier National Park continues to come under the spotlight as environmental conservation agencies petition to have the Waterton-Glacier International Peace Park declared an endangered World Heritage Site. Unpredictable weather nationwide, wildland fires and snow levels could have repercussions on the yearlong travel season. Wildland fires impact the shape of the land with immense acreage of blackened forested areas, and this affects public perception of safety. Smoky skies from wildland fires near and far can also keep visitors at bay.
13. Crisis management, outreach and traveler education – The global pandemic, wildland fire and

smoke, community capacity and recreating responsibly are all ongoing crises that we address through outreach and education.

14. Fluctuations in the economy – The economy is seeing continual fluctuations, and while inflation has flattened, Montana is a high-cost destination, which could result in either visitation leveling off or decreasing.
15. Emerging markets – We have a new visitor to Western Montana’s Glacier Country. They are new to outdoor recreation and lack the experience and etiquette we are used to. A high-value visitor may no longer be considered high in value based on spending but on how many of the shared values a visitor has and the respect and consideration they show. To define a shared-value visitor more clearly, we refer to them as a preferred visitor. The bleisure market is a growing trend among business travelers to extend their trips for leisure purposes – enhancing the travel experience.
16. Public lands infrastructure and maintenance issues – Public lands infrastructure repairs, reconstruction, late openings, limited parking and unpredictable weather events result in seasonal impacts. Fluctuations in agency funding result in additional infrastructure impacts. While funding has been dedicated to addressing these issues, there is not enough to address all the problems. Also, the impacts on visitor experience while the improvements are being made are often significant. Communication strategies will be key factors for informing the public about year-round services and activities in and around our federal and state public land recreation areas.
17. International issues – Trepidation to travel overseas to the U.S. because of worldwide issues continues to impact Glacier Country. Perceived safety issues, economic instability and rising prices are all issues that impact people’s ability, political climate and proclivity to travel.
18. Market competition – With the return of urban and international destination travel, we must be ready for fluctuations in visitor numbers. We must be ready to maintain the market share of responsible visitors we want, including seasonal visitors for communities with capacity. Western Montana also offers indoor experiences, sports events, meetings and conventions, destination weddings, etc., many of which still have room for additional visitors.
19. Public transportation – Although we have key modes and providers of transportation within our larger communities, much of our region has limited means of public transit between cities and area attractions.
20. Shared economy accommodations – There is a continued increase in short-term rentals, and while they greatly enhance visitor experience and community capacity in destinations with few or no hotels and motels, they can reduce long-term housing capacity and impact the ability for workers to reside in these homes in the area where they are employed.
21. Social media algorithm changes and expanded privacy laws – There has been an increase in ad blockers and changes in privacy laws, and these affect digital targeting options. Social platform demographics and algorithms are evolving quickly as well. Short-form videos, user-generated content, and influencers are more important than ever. Chronological feeds are also making a comeback. We must be nimble, innovative and strategic in an ever-changing landscape. We are monitoring increased misinformation and security concerns surrounding certain platforms.
22. Broadband infrastructure and Wi-Fi – Having access to broadband is increasingly important, especially with remote workers remaining strong. Broadband has become an indispensable driver of economic growth and workforce development, creating new opportunities for rural Americans to

participate in the modern, global economy and changing how they find and do their jobs.

23. Federal government closures – Uncertainty in federal government spending has resulted in federal government furloughs and closures in recent years. Strong communication strategies will be key factors for informing the public about year-round services and activities in and around our federal and state public land recreation areas.
24. Federal and tribal land closures – Land closures can have a devastating social and economic impact. We must be prepared to respond with communication strategies to ensure awareness of future closures—in the case of another pandemic or public emergency—to minimize impacts on resident and visitor experiences.
25. DMO funding for sustainable destination stewardship and development – DMOs are rapidly responding to the evolution from destination marketing to destination management and stewardship. Protecting the 4% Lodging Facility Use Tax used for these expanding roles remains a constant struggle. The need for funding to address the challenges our communities face from an imbalance of resident quality of life and visitor quality of experience is of great importance.
26. Perception that Glacier National Park is closed when the Going-to-the-Sun Road isn't open in its entirety – Many of our travelers think Glacier National Park is only open during the summer season, particularly when the Going-to-the-Sun Road is open to vehicles. Western Montana's Glacier Country is actively working through public relations, newsletters, our travel guide, blogs, social media, our website, and our call center to aggressively promote the fact that Glacier National Park is a year-round destination. It is critical to our effort to lessen the impact to the park during the summer and increase awareness of the other three equally stunning seasons of the year.
27. Destination marketing/management/stewardship organization awareness – While not as much of a challenge as it was a couple of years ago, destination organizations must continue to work at building awareness of who we are, what we do and why we do it, especially the notion that we are part of the problem, not the solution.

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

In FY 2024, we went through a rebrand process. The main goals of the rebrand are to ensure our brand is current and representative of who we are now and who we aspire to be. Like many destination organizations, we have evolved – even moving beyond our efforts of destination stewardship to destination leadership. At the rate of this evolution, we must have a brand that will keep pace and evolve as we do without going through this process again in the next couple of years. We looked at this rebrand as an opportunity to take a fresh look at ourselves and create a brand that clearly emulates who we are now and who we aspire to be.



NEW Brand

These pillars are what make us tick, deeply woven into our love for keeping Western Montana's Glacier Country as special as it is. Our stories are drenched in the grandeur, vibrance and adventurous spirit that our unique geography inspires. We welcome visitors, but there's more to it. We're big on looking after our postcard-perfect backyard, making sure every bit of its magic is there for future generations to discover. These brand pillars showcase what makes our region special and how we connect on a human level. They serve to help focus and guide our messaging to our audiences.

Enrich Community. Enhance Connection.

Western Montana's vibrant communities, local events and travel corridors are the heart and soul of our region, and they create real, lasting connections for the people who live here and for those who visit. By making sure everyone who comes into our corner of Montana feels welcome, we're building a place where community spirit and individual expression are valued. It's about more than just feeling good; it's about doing good—for Montana, for our quality of life and for our local economy. Our brand echoes the soul of Western Montana and the connections we make, fostering a sense of belonging that transcends boundaries.

Celebrate Diversity. Encourage Inclusivity.

Our brand celebrates diversity. Diversity in landscapes, communities, people and cultures. We recognize each as a vital part of our history and our future. Western Montana's Glacier Country sits on the traditional, ancestral territory of the Amskapi Piikani, Ksanka, Séliš, and Qlispé people. We honor the deep traditions of the Blackfoot Indian Tribe and the Salish and Kootenai Tribes, and the rich tapestry of art, music, dance, storytelling, adventure, industry and leisure they provide today. Our commitment is to inclusivity, ensuring voices from all walks of life are heard and valued as we build a respectful and unified future together.

Seek Adventure. Sustain Nature.

Western Montana's four distinct seasons provide year-round adventures. By understanding our communities' unique offerings and seasonal capacity, we can customize marketing efforts and audiences to best serve the communities' and the region's goals. We seek to attract visitors who share our love for the outdoors, our hunger for new experiences and our devotion to protecting this unforgettable place. We provide inspiration, information and education to empower visitors and residents to be guardians of Western Montana and its delicate ecosystem.

Champion Stewardship. Foster Partnerships.

As stewards of the iconic landscapes that define Western Montana, we take immense pride in preserving these incredible treasures, like Glacier National Park and Flathead Lake. We are also committed stewards of the visitor experience, providing awe-inspiring moments and life-changing connections while sustaining our way of life and preserving our sense of place. Our unwavering commitment to leadership, partnership and preservation serves as our guiding inspiration, ensuring that these invaluable treasures are safeguarded, in their purest form, for future generations to enjoy.

Glacier Country's new brand aligns nicely with Destination MT's marketing and strategic goals and the regional resiliency plan we recently completed as part of Montana's resiliency planning efforts. All three align to ensure the visitor economy is relevant and its benefits are felt at the grassroots level in every community.

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Destination Marketing:

Destination Management:

Destination Stewardship:

Destination Development:

:

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

OUR AUDIENCES

Glacier Country wants to attract people who first and foremost respect the people who live here and the lifestyle we treasure. Our communities enjoy the visitor spending, which stimulates our economy and provides opportunity for growth. Sustainable growth relies on the alignment of interests and characteristics of those who live here and those who are visiting.

Based on season and community capacity, the following visitor segments are who we will actively message:

- Sustainable traveler
- Leisure traveler
- Geo-tourist
- Active mature
- Families
- Repeat visitors to Montana
- International traveler
- Domestic group tours
- Business traveler
- Meetings and conventions
- Reunions and weddings

- Higher education
- Health care
- Winter enthusiasts
- Music lovers
- Filmmakers
- Seasonal visitors

DEMOGRAPHICS

- **Individuals** – Mid-30s+, HHI \$75,000, college graduate, active and affluent, take at least two vacations per year, may be traveling in groups of two or more, in-tune with nature
- **Mature geo-traveler couples** – 55+, HHI \$75,000, active and affluent, high-value low-impact couples, may be traveling as groups with other friends and/or extended family
- **Families** – Multigenerational travelers, children under age of 18, HHI \$75,000, active and affluent, in-tune with nature
- **Repeat Montana target traveler** – Has previously visited Montana. Very likely to vacation within the U.S. in the next 12 months. Average age 50. HHI \$125k. In-tune with nature. Preserving the environment.
- **Groups** – Affinity or corporate groups that are active and appreciate gathering and taking part in our unique environment

GEOGRAPHICS

- **Residents:** Montana
- **Drive markets within 600 miles:** Idaho (Coeur d’Alene), Washington (Spokane), Wyoming
- **Canada:** Calgary and Edmonton, Alberta, Vancouver, British Columbia
- **Domestic:** Direct-fly markets of Washington (Seattle), Oregon (Portland), Minnesota (Minneapolis), Illinois (Chicago), Texas (Houston and Dallas), California (San Francisco, Los Angeles, San Diego)
- **International (outside Canada):** UK, Germany, France, Italy, Benelux, Nordic, Australia/New Zealand

PSYCHOGRAPHICS

- **Responsible visitors and recreationists** who are respectful and kind to our residents and good stewards of our destination
- **Authentic experiences**—shopping, local cuisine, breweries, distilleries, relaxing spa getaways, western offerings
- **Outdoor recreation**—hiking, biking, camping, skiing, snowmobiling, water sports, golfing, fishing, wildlife viewing, RVing, motorcycling, scenic road tripping
- **Culture**—history, galleries, museums, live theater, festivals, live music, photography
- **Adventure**—experiential, independent, low-impact

3b. What research supports your DMO strategy? :

The tourism industry is rapidly changing. To remain successful, tourism stakeholders must be even more strategic when understanding their market and competition, planning their operating strategies and ensuring their sustainability. To do this, one of the key building blocks is research.

Research is the process of finding and analyzing information. Among other things, it consists of gathering information about people's behaviors, ideas, attitudes and preferences regarding various topics or concepts. Research also aims to measure and assess this information for decision-making purposes. When a decision is based on reliable facts and relevant information, it is usually far more effective and credible. Through research, community leaders can gain a better understanding of visitors. By understanding visitor preferences and motivations, you can more easily define and solve business problems, set priorities, increase the demand for your services and strengthen profits. Good research information also benefits the entire tourism industry, including business owners, operators, visitors, communities, associations, governments and residents who call the destination home.

Research informs our solutions. It helps us understand local tourism issues and identify key sustainability needs. It provides the knowledge to devise solutions that are grounded in reality and address the most pressing threats to local environments, people and economy.

2023 NONRESIDENT VISITATION, EXPENDITURES & ECONOMIC IMPACT ESTIMATES

by Kara Grau, Institute for Tourism and Recreation Research

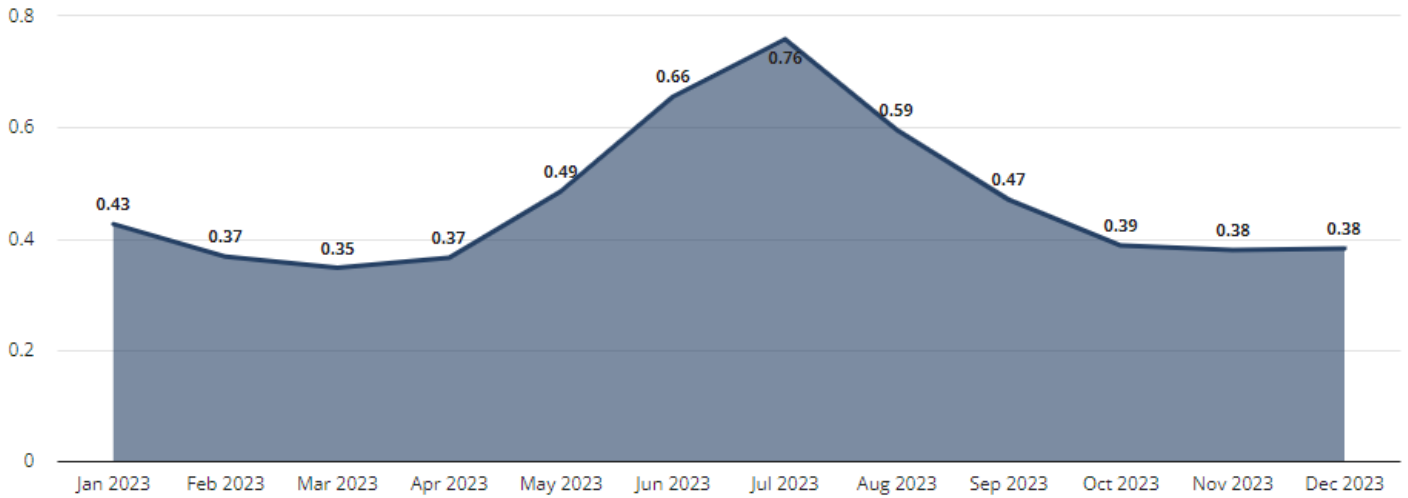
- In 2023, 12.5 million nonresident visitors to Montana spent an estimated \$5.45 billion in the state.
- This \$5.45 billion in local spending directly supports \$4.84 billion of economic activity in the state, and supports an additional \$3.37 billion of economic activity, indirectly.
- The estimated total contribution of nonresident spending to Montana's economy was \$8.21 billion in 2023.

REGIONAL VISITOR TO RESIDENT RATIO (2022 VS. 2023)

Source: ZARTICO Geolocation Data

- Yearly Average: .50 or 50 visitors to 100 residents (down 8% over 2022)
- Seasonal Average:
 - January to March – .41 or 41 visitors to 100 residents (up 21% over 2022)
 - April to June – .54 or 54 visitors to 100 residents (down 2% over 2022)
 - July to September – .67 or 67 visitors to 100 residents (down 16% over 2022)
 - October to December – .41 or 41 visitors to 100 residents (up 15% over 2022)

Visitor to Resident Ratio By Month



REGIONAL LODGING DATA (2023)

Hotels

Source: Smith Travel Reports

- Average Daily Rate: \$164
- Occupancy: 59.6%

Short Term Rentals

Source: KeyData

- Average Daily Rate: \$266
- Occupancy: 23.8%

REGIONAL AIRPORT DATA (2023)

Missoula Montana Airport (MSO)

- Deplanements: 454,037

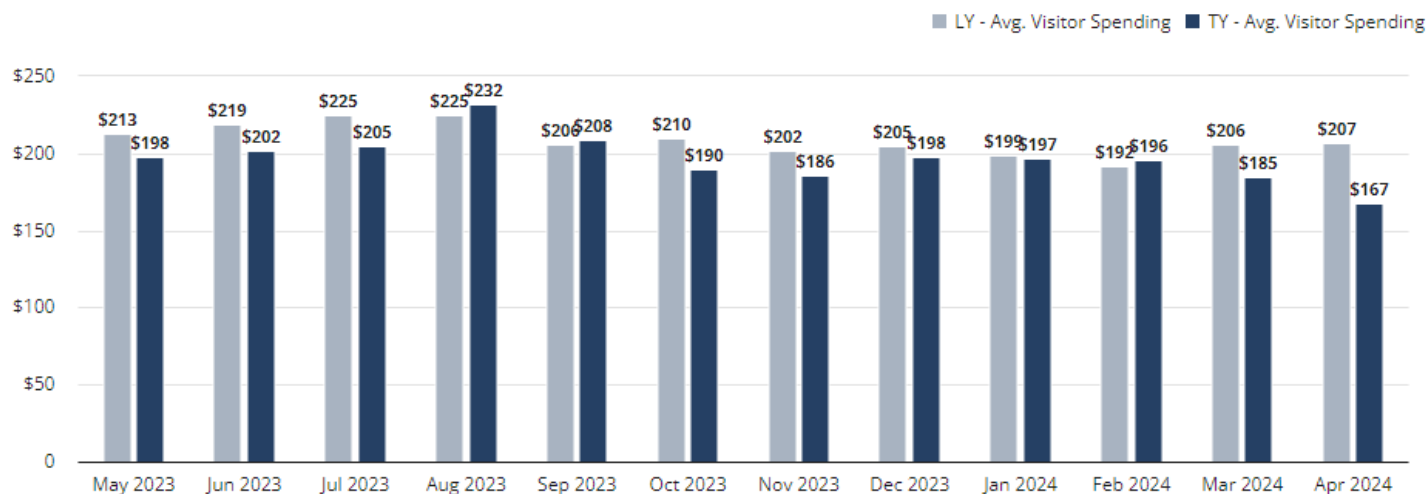
Glacier Park International Airport (FCA)

- Deplanements: 440,171

AVERAGE VISITOR SPEND BY MONTH (YOY - MAY 2023 to APRIL 2024)

Source: Zartico - Affinity Group

Avg. Visitor Spending by Month YOY



THE VALUE OF STEWARDSHIP

by Jack Johnson, *Destinations International*

In 1983, the United Nations tapped former Norwegian prime minister Gro Harlem Brundtland to run the new World Commission on Environment and Development. After decades of effort to raise living standards through industrialization, many countries were still dealing with extreme poverty. It seemed that economic development at the cost of ecological health and social equity did not lead to long-lasting prosperity. It was clear that the world needed to find a way to harmonize ecology with prosperity.

After four years, the "Brundtland Commission" released its final report, 'Our Common Future'. It famously defines sustainable development as: development that meets the needs of the present without compromising the ability of future generations to meet their own needs. The intent of the definition was to unify environmentalism with social and economic concerns on the world's development agenda. Sustainability is a holistic approach that considers ecological, social, and economic dimensions, recognizing that all must be considered together to find lasting prosperity.

When we speak of sustainability as a value of destination organizations, we refer to this holistic definition. It is not just the environment, but also economic and social structure of our communities.

Environmental Sustainability, when maintained, means all of our community's environmental systems are kept in balance while natural resources are consumed at a rate that allows them to replenish themselves.

Economic Sustainability means that communities across the globe can maintain their independence and have access to the resources that they require, financial and otherwise, to meet their needs. Economic systems are intact, and activities are available to everyone to secure sources of livelihood.

Social Sustainability means that universal human rights and basic necessities are attainable by all people. They have access to enough resources to keep their families and communities healthy and secure. Healthy

communities have leaders who ensure personal, labor, and cultural rights are respected and all people are included, treated equitably, and protected from discrimination.

The motivations behind sustainability are often complex, personal, and diverse, and the definition of sustainability is intentionally broad. For sustainability to remain a relevant value, concept, and tool, it is important that each industry adapt a definition to our own context. Furthermore, each destination organization must do the same.

In 2019, [Destinations International's Destination NEXT Futures Study](#) identified, along with community alignment and digital conversion, destination stewardship as one of three industry wide transformational opportunities that destination leaders need to leverage collectively to effectively lead their organizations today.

The study spoke of building public-sector coalitions between the visitor industry, economic development agencies, academic institutions, and civic and philanthropic organizations. The goal is to curate more immersive destination experiences, manage sustainable visitor growth, promote equitable economic development, and elevate quality of life and quality of place.

THE STATE OF THE AMERICAN TRAVELER – DESTINATION DECISIONS 2024

by Miles Partnership and Future Partners

- While travelers' personal financial sentiments remain a top concern as they map out their travel plans for 2024, certain household incomes remain unaffected by current travel prices. Travelers living in large cities with an annual HHI of \$100K or higher feel that now is a good time to spend on travel.
- Excitement for leisure travel remains high, with over 87% of U.S. travelers already having trips planned in 2024. This year, travelers are expected to take an average of 3.6 leisure trips in the next 12 months, and 52% intend on prioritizing travel spending in the next three months.
- 74.7% of travelers agree that when choosing a destination to visit, affordability is the most important and desired information, including lodging costs, transportation and food.
- When asked how destinations could best reach them during their travel planning, 34.8% of travelers said email, while 34% preferred websites found via search engine. Just over one-third of all travelers have used online video to plan their travel in the last year and, unsurprisingly, Millennials and Gen Z take the lead in online video usage.

THE STATE OF THE AMERICAN TRAVELER – DESTINATION STEWARDSHIP EDITION 2024

by Miles Partnership and Future Partners

- Perceptions around high travel costs and expenses remain top deterrents to leisure travelers from traveling more than they would have otherwise preferred this year. The majority of travelers say that in general, travel is too expensive right now (38.5%), personal financial reasons have kept them from traveling (37.1%), gasoline is too expensive (32.3%) and airfare is too expensive (25.8%). Despite this, Americans are still excited about travel, with 54% saying travel will be a budget priority in the next three months.

- The percentage of American travelers that feel travel has an overall negative impact on the environment is slightly down from last year (23% in 2022 vs. 20% in 2023). There is an uptick in the consideration of environment and community while traveling, especially among Gen Z and Millennials. Top concerns include plastic waste, crowding and congestion in communities, energy consumption and increasing costs for residents.
- The belief that tourism improves communities is at an all-time high. 46% of Americans agree with the statement that “tourism in my community makes it a better place to live.” Again, we see that higher income groups are more likely to agree with this statement.
- Overall, the outlook around green initiatives, adjusted travel habits and community sentiment paint a positive picture of inspired action as we look toward the future. Leisure travelers are more willing to pay more for hotels with green programs (35%) and plan to travel closer to home (22%) or explore their own destinations (17%) to lower the impact of their travels on the climate and communities.

THE STATE OF THE AMERICAN TRAVELER IN MARCH 2023

by Destination Analysts

The Emergence of ChatGPT: With such notable levels of excitement, integration and adoption, ChatGPT (and other AI) appears poised to be transformative in many ways. In our latest survey, 6% of American travelers report having used ChatGPT for any reason—so far, 2% have used it specifically for travel inspiration or trip planning. But interest is emerging. Over 26% of American travelers overall (and 40% of millennial-aged travelers), say they are “interested” or “very interested” in using ChatGPT for travel inspiration and/or trip planning going forward.

3c. What are your emerging markets?:

We view emerging markets a little differently these days. In recent years, we saw a new visitor to our region—one who was new to rural Montana and outdoor recreation. We also saw an influx of people moving to Montana who are new to living and working in rural communities. Both these markets are targets of our Recreate Responsibly messaging.

Our communities have changed their target customer a bit—they seek “preferred” visitors over “high value” visitors, with each community/county identifying the preferred visitor a little differently. For example, the high-spending visitor is not at the top of the preferred list as it once was; at the top are visitors who are respectful of the people who live here and respect our natural resources. We also continue to hear that Montanans, Canadians and international visitors are viewed as preferred visitors. We will work hard to increase the rate of return for these segments.

Bleisure travel refers to the blending of business and leisure activities during a single trip. This trend has been steadily growing as more professionals seek to maximize their travel experiences. Montana, renowned for its breathtaking natural landscapes and outdoor recreational opportunities, is poised to

capitalize on the bleisure travel trend due to its ability to offer both productive business environments and rejuvenating leisure activities in the same destination, appealing to travelers seeking a balance between work and relaxation.

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

DESTINATION MARKETING

Consumer Messaging: Glacier Country's messaging strategy is based on season, capacity of the community/travel corridor and visitor experiences available. Depending on the targeted audience, our message will vary. A common theme of our messaging is to recreate responsibly. As an example, our 2024 campaign is called *Treasure it*.

"In the magnificent landscapes and vibrant small towns of Western Montana's Glacier Country - it's easier to breathe deeper, connect with nature and yourself, and find inner peace. Here, distractions fall away in the face of authentic experiences. Outside noise and influence quiet down. Here, you can truly *treasure* the moments that matter most."

This campaign allows the imagery and people of the region to do the speaking. The campaign works with various targeted messaging to national and in-state consumers, weddings, meetings and conventions and is flexible enough to adapt to any potential challenges. We are excited to show our campaign at the June meeting.

We employ a full array of tactics that inspire an emotional connection using strong creative messaging for the potential visitor. We then provide them with the tools they need to take that first step toward action, which is to start thinking about a trip to Western Montana's Glacier Country. This may be a print or digital ad or meeting with a tour operator, travel agent or meeting planner at a trade show; it could be by an earned media article in a magazine, webpage or blog, or it could be on social media.

We then provide several ways to learn more about the region, making orientation intuitive by reaching people in the way they want to interact. We employ a diverse mix of marketing methods, including ordering a travel guide from a print ad offer, clicking a digital ad directing to a landing page on our website specific to their interests, and signing up for our consumer and B2B blogs and e-newsletters.

We want facilitation to be easy and enjoyable, so we have several hands-on ways for our visitors to plan their trips, including requesting a free travel guide—available in print and digital versions—and exploring our webpage and supporting microsites (consumer leisure, group and international tour operators, meetings and conventions, film production, destination weddings) where we help them really discover what they want to do by making it easy to interact with communities, businesses and attractions directly. Additionally, our call center is staffed with trained professionals who are available via live chat, email and phone for visitor assistance. For meeting planners, we assist with venue RFPs, site visits and vendor referrals. Itinerary assistance is provided to tour operators for both group and international markets.

Logistics assistance and referrals are offered to those planning destination weddings.

Film Promotion: The production of feature films, television series and commercials can generate significant economic activity for their host communities, drawing out-of-town spending, generating jobs and supporting local businesses.

The benefits to local communities from the film and entertainment industry are considerable. When a production shoots on location, it brings jobs, revenue and related infrastructure development, providing an immediate boost to the local economy. Film-induced tourism can affect travel decisions when potential tourists plan their upcoming holiday or visit to a destination. Films, documentaries, TV productions—like the “Yellowstone” series—and commercials inspire people to experience locations seen in the content screened and explore new destinations.

Tourism Sales: Our tourism sales program goal is to help develop, promote, manage and monitor domestic group tours, meetings and conventions, destination reunions and weddings, and international FIT sales and marketing programs. Western Montana’s Glacier Country has developed a collaborative and broad-based approach to group travel: group tours, foreign independent travel (FIT), incentive travel, sports, meetings and conventions. Group marketing is complex and requires a personal relationship to be built and maintained with industry representatives on a business-to-business level. Building that relationship with planners and tour operators takes time (domestic is two to three years, international is three to five years). We have had consistently strong attendance at travel trade shows and meetings and convention trade shows, building strong relationships with buyers in these markets for many years and producing leads for our tourism partners in Glacier Country. We plan to continue this program and prepare to welcome visitors as these markets continue to seek out new destinations and grow. We support this program with a B2B blog, a quarterly tour operator and meetings and convention newsletter, Glacier Country partner education, paid advertising campaigns and earned media, along with hosted familiarization tours.

Communications: Our communications program develops, manages and monitors our publicity and earned media projects and programs. Every year, our publicity efforts result in a strong performance with travel writers, travel bloggers and digital influencers. They help share and spread our messaging, including highlighting lesser-known areas, off season travel and promoting recreate responsibly messaging We plan to continue our efforts with a support budget for trade media shows, media events, press trips and familiarization funding to be flexible and responsive for those we host and those we promote.

Travel media relations efforts are focused on sharing information about regional stakeholders in promoting key messages and experiences to the traveling public with travel writers, TV show producers, documentary film crews, social media content creators and others. In some cases, this is done by collaborating with partners to bring these people to our region, and in other cases we gather and send assets like editorial, images and video content or links to various travel media outlets. Earned media refers to media exposure earned through these relationships with key media outlets who feature our story or tourism experience as a result of hosting a media trip or pitching a story.

DESTINATION MANAGEMENT

Crisis Communications: Our crisis communications strategy ensures we are ready to share a clear, concise and accurate message with our visitors. This plan includes our efforts working directly with media as well as sharing a communication tips sheet with our businesses so they can better understand the do's and don'ts when talking with visitors, including social media posts and messaging. We will continue to have an updated crisis plan that can be implemented if and when necessary. We plan to evaluate it by monitoring if we were able to effectively implement it and minimize the negative effects of the crisis that triggered it.

Being prepared for harmful situations is imperative. It is important to map out potential negative scenarios and have a PR plan for each one helping to minimize the negative effects of the situation or event.

As a response to an overwhelming number of people spending more time in outdoor spaces, we continue our efforts with the Recreate Responsibly movement, which provides guidelines that offer a starting point for getting outside and minimizing impact on natural resources. Together with Glacier National Park; Montana Fish, Wildlife & Parks; Flathead National Forest; Montana Office of Tourism, Discover Kalispell and Explore Whitefish, Western Montana's Glacier Country launched "Recreate Responsibly in MT," an initiative that guides and informs those recreating in our state to be good stewards of Montana's people, cultures and land. The messaging targets visitors, residents and businesses, providing education and tools for best practices on how to minimize impact, leave no trace, know before you go, prevent wildland fires, stop aquatic invasive species and travel safely. Building upon messaging from RecreateResponsibly.org, the Leave No Trace Center for Outdoor Ethics, and Tread Lightly, our efforts include resources available to businesses throughout the state as well as marketing and messaging targeted at travelers and recreators. This messaging is included on webpages, airport signage, statewide television and radio advertising, billboards, fuel media video PSAs, rack cards, trailhead signage, social media advertising and posts, videos and a Recreate Responsibly "tourism pledge" visitors and residents can sign.

DESTINATION STEWARDSHIP

Traditionally, the tourism sector has defined itself with a single tactic—marketing. It has also defined overall success as a single metric—volume. There are few other sectors beyond tourism where the organizations stewarding their industries spend so much more effort and resources on marketing a product than they do developing and managing a product. Addressing that, in recent years, the world's most progressive tourism organizations have been expanding from destination marketing to destination management. It's a shift from solely promoting communities to engaging and stewarding communities, providing a more livable, appealing and sustainable destination.

In this new paradigm, the impact of tourism is no longer measured solely in economic terms. We also measure success against the well-being of our destination, considering nature, human health and community identities. We must be thoughtful about how the quality of the visitor experience can be balanced with the quality of life for residents; about the types of visitors who would provide maximum financial value to our local communities while having the optimal social and environmental impact; and about how we can responsibly grow our tourism industry for the benefit of all in our communities.

Destination Stewardship: The core deliverable for our **destination stewardship plan** is a new

strategic framework with five high-level goals and actionable initiatives for each to accomplish the vision for Western Montana's Glacier Country. The goals are interdependent and designed to collectively optimize the year-round economy and enhance the local community character and cultural DNA.

The **five strategic pillars** are:

- **be** an advocate for Western Montanans,
- **encourage** responsible tourism and recreation,
- **enhance** experiences in rural communities,
- **shape** demand and disperse visitors,
- **foster** stronger stakeholder alignment and collaboration.

The strength of this program is that it involves all stakeholders with the aim to benefit residents, businesses and visitors for years to come.

Community Engagement: Western Montana's Glacier Country will continue to develop our **community engagement program** to build public support around a shared vision for the destination—balancing economic development, sustainable tourism and quality of life. As awareness of the tourism industry grows, positive and negative perceptions of it also grow. Montana's destination organizations, including Glacier Country, have mostly operated behind the scenes without telling our own story—sharing what we do, how we do it, why we do it and how we measure our success with qualitative and quantitative metrics.

This program works with a much broader audience to ensure our shared efforts are inclusive, thoughtful, accurate, trusted and empowering. We will support and foster community engagement and involvement as well as utilize project funding to not only develop projects but implement them when and if appropriate.

DESTINATION DEVELOPMENT

Combined with our existing cooperative grant program, VIC staffing grants, community event promotion program, and education and outreach programs, we provide collaborative opportunities to leverage projects, programs and funding for activities that increase and improve the quality of a visitor's destination. To make tourism a vibrant, healthy and manageable component of the local economy, we will work with our communities to craft and implement tourism management strategies that are locally driven, authentic and desirable. Every community can benefit from destination development. Visitor experiences are improved with destination development, which increases spending and tax revenues; diversifies and strengthens urban and suburban economies; enhances the recreation and support service infrastructure in emerging, rural tourism destinations; and increases support services, capacity and visitor season for developed gateway communities. Our destination stewardship plan outlines many of these development needs at the community level, which provide a project work list that is already in the works.

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

Objectives/Metrics/Evaluation:

Our **goal** is to balance a thriving visitor economy with our communities' long-term health and vibrancy.

1. Build and/or maintain awareness of Glacier Country and its communities as a recognized tourism destination in identified markets and audiences in a way that balances and sustains visitation among resident, nonresident, domestic and international travelers based on seasonal capacity.
2. Encourage residents and visitors to be good stewards of our home by traveling responsibly.
3. Monitor and track the characteristics and behaviors of visitors to Glacier Country.
4. Monitor resident sentiment toward tourism
5. Identify, monitor, participate in and support efforts around the social, economic and environmental impacts of tourism on our communities and region.
6. Continue to execute and expand the community engagement program

OBJECTIVES	MEASURABLE METRICS FOR SUCCESS	REPORT THE METRIC ACHIEVED	EVALUATION OF SUCCESSFUL METRICS
<p>It is important to track the effectiveness of our sales and marketing programs, so we will monitor the performance of our paid media, social media, webpage analytics, earned media/digital influencer reach and ad value, B2B leads, call center and travel guide performance.</p>	<p>We will measure the performance of messaging tactics</p> <ul style="list-style-type: none"> • Use of responsive webpage • Social media audience growth • Consumer leads database growth • Consumer blog and B2B blog readership growth • Digital travel guide readership • Track overall paid media performance using KPIs of impressions delivered, engagement rate and cost per engagement • B2B lead growth • Track earned media ad value and readership/impressions delivered 		

<p>We will continue to work on the 33 initiatives in our destination stewardship plan. Much of the work under this program is based on what our communities have identified they need from us for creating solutions.</p> <p>We will track this program's activities to ensure meaningful engagement across all our counties and communities and provide data, research and/or funding (when appropriate) to assist them.</p>	<p>Track the use of the online community engagement platform.</p> <p>Track workforce trends by monitoring jobs available, unemployment rate and average income</p> <p>Track affordable housing by monitoring median household income compared to median residential home price and median rent by county</p> <p>Track visitor-to-resident ratio in the region and by county</p>		
<p>Continued from above</p>	<p>Track impacts of short-term rentals on our communities by tracking the rate of short-term rental growth in the region, number of available units, occupancy and average daily rate by region and county</p> <p>Monitor resident sentiment toward tourism using resident sentiment survey data.</p>		
<p>Continued from above</p>	<p>Track visitation trends using data from ITRR and Zartico. The data will include top spending markets, visitor</p>		

	spending, visitor dispersion, and percent of in-state/out-of-state/resident travel.		
Continued from above	Track the amount of lodging facility sales and use tax collected for Montana's general fund, which is funding paid by visitors that directly supports state government projects and programs		

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Budget Form: FY25 DMO Budget Form V1 - Glacier Country.xlsx

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DMO Budget:

Allowable Method	Amount Budgeted	% Budgeted	Amend +/-	Updated Budget	% Budgeted
Administration	\$800,000.00	16.08%	\$0.00	\$800,000.00	16.08%
Joint Ventures	\$150,000.00	3.02%	\$0.00	\$150,000.00	3.02%
Opportunity Marketing	\$100,000.00	2.01%	\$0.00	\$100,000.00	2.01%
Cooperative Marketing	\$50,000.00	1.01%	\$0.00	\$50,000.00	1.01%
Marketing Personnel	\$355,000.00	7.14%	\$0.00	\$355,000.00	7.14%
Agency Services	\$500,000.00	10.05%	\$0.00	\$500,000.00	10.05%
Marketing Resources	\$80,000.00	1.61%	\$0.00	\$80,000.00	1.61%
Paid Media	\$1,200,000.00	24.12%	\$0.00	\$1,200,000.00	24.12%
Earned Media/Tourism Sales	\$381,000.00	7.66%	\$0.00	\$381,000.00	7.66%
Website Development (Online, Website, Mobile)	\$150,000.00	3.02%	\$0.00	\$150,000.00	3.02%
Education/Outreach	\$210,000.00	4.22%	\$0.00	\$210,000.00	4.22%
Travel/Trade Shows	\$80,000.00	1.61%	\$0.00	\$80,000.00	1.61%
Research	\$155,000.00	3.12%	\$0.00	\$155,000.00	3.12%
Product Development	\$470,000.00	9.45%	\$0.00	\$470,000.00	9.45%
Visitor Services	\$294,000.00	5.91%	\$0.00	\$294,000.00	5.91%
TOTAL BUDGET	\$4,975,000.00	100.00%	\$0.00	\$4,975,000.00	100.00%

Revenue Projection

\$4,000,000.00

Funds not spent during previous fiscal year	\$975,000.00
Rollover Funds at Commerce	\$0.00
Allocated Following Audit	\$0.00
Budget increase total	<u>\$4,975,000.00</u>

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Narrative Evaluation: