



Final TAC SOP for Vote

Effective February 2024

MONTANA TOURISM ADVISORY COUNCIL OPERATING POLICIES

1. **STATUTORY OVERVIEW:** TOURISM ADVISORY COUNCIL (“TAC” or the “Council”) is part of the Executive Branch of the State of Montana. TAC was created by § 2-15-1816, MCA. TAC’s mission generally is to act in an “advisory” capacity, which Montana law defines as “furnishing advice, gathering information, making recommendations, and performing other activities that may be necessary to comply with federal funding requirements and does not mean administering a program or function or setting policy.” See § 2-15-102(1), MCA.

The Governor is the Chief Executive Officer of the Executive Branch of the State of Montana. See Mont. Const. Art. VI, § 4. The Governor supervises all Executive Branch officers, including TAC. See § 2-15-201, MCA. The Governor also formulates and administers all policies of the Executive Branch, including by setting budget policies and priorities. See § 2-15-103, MCA. The Governor resolves any policy conflicts within the Executive Branch. *Id.* Council members are appointed by the Governor pursuant to § 2-15-1816, MCA, and may be replaced at the Governor’s discretion.

TAC is administratively attached to the Montana Department of Commerce (the “Department”). See Admin. R. Mont. 8.1.101(6)(k). TAC’s relationship with the Department is governed, in part, by § 2-15-121, MCA. TAC acts in accordance with § 2-15-121(1), MCA, including by: (i) submitting its budgetary requests through the Department; and (ii) submitting any reports required of TAC through the Department. TAC also acts as explicitly directed by Montana law, as discussed in greater detail in Section 3, below.

The Department acts in accordance with § 2-15-121(2), MCA, including by: (i) directing and supervising TAC’s budgeting, recordkeeping, reporting, and related administrative and clerical functions; (ii) including TAC’s budgetary requests in the Department’s budget; (iii) collecting all revenues for TAC and depositing them in the proper fund or account; (iv) providing staff for TAC as deemed necessary and subject to available funding; and (v) adopting, printing, and disseminating for TAC any required notices, rules, or orders adopted, amended, or repealed by TAC. See *also* § 2-15-1816(6). The Department does so primarily by acting through its Destination MT Division staff, as well as the Director’s Office staff.

The Department’s Director acts in accordance with § 2-15-121(3), MCA, including by: (i) representing TAC in its communications with the Governor; and (ii) allocating office space to TAC as necessary, and subject to approval from the Department of Administration. If TAC wishes to communicate with the Governor, the TAC Chair communicates that intention to the Department’s Destination MT Division staff, who then communicate with the Department’s Deputy Director and/or Director as needed.

To the extent any conflict exists between any of these Operating Policies and any provision of Montana law, including statute, administrative rule, or court order, the conflicting portion of these Operating Policies are void.

2. **PURPOSE:** Pursuant to § 2-15-1816(4) and (5), MCA, the Council shall:

- a. "Oversee distribution of funds to regional nonprofit tourism corporations for tourism promotion, nonprofit convention and visitors bureaus, and the state-tribal economic development commission established in 90-1-131 on behalf of an Indian tourism region in accordance with Title 15, chapter 65, part 1" of the Montana Code Annotated.

TAC accomplishes this directive, in part, by reviewing and approving annual Destination Management/Marketing Organization ("DMO") Marketing Plans and their evaluation reports in accordance with the regulations, guidelines, and procedures the Department has adopted on TAC's behalf in the Administrative Rules of Montana and TAC's internal policies.

- b. "Advise the Department of Commerce relative to tourism promotion."
- c. "Advise the Governor on significant matters relative to Montana's travel industry."
- d. "Prescribe allowable administrative expenses for which accommodation tax proceeds may be used by regional nonprofit tourism corporations and nonprofit convention and visitors bureaus."
- e. "Direct the university system regarding Montana travel research."

TAC accomplishes this directive, in part, by soliciting, evaluating, and approving research projects to be executed within the budget established by § 15-65-121(2)(b), MCA, for the Institute for Tourism and Recreation Research ("ITRR").

- f. "Approve all travel research programs prior to their being undertaken."
- g. "Encourage the State-Tribal Economic Development Commission ("STEDC") and regional nonprofit tourism corporations to promote tourist activities on Indian reservations in their regions."
- h. "Encourage regional nonprofit tourism corporations and nonprofit convention and visitors bureaus receiving money under subsection (a) to promote public and nonprofit history museums in their regions."
- i. "Urge the Department of Transportation to include museums recognized by the museums association of Montana when it updates and publishes the state maps."
- j. "Modify the tourism regions established by executive order of the governor," as necessary.

- 3. **OTHER STATUTORY OBLIGATIONS:** The Council also acts in accordance with other provisions of Montana law that reference the Council, including:

- a. Section 15-65-122, MCA, which directs the Council, in part, to review and approve “annual marketing plan[s]” submitted to the Council by regional nonprofit tourism corporations or nonprofit conventions and visitors bureaus before the Department of Revenue disburses funds to those entities.
 - b. Section 22-3-1002(2)(c)(v), MCA, which directs the Governor to appoint one member of the Council to the Montana Heritage Preservation and Development Commission. This TAC member shall provide status reports at Council meetings as needed.
 - c. Section 22-3-1305(2), MCA, which directs the Council to review in consultation with the Department “all proposals for historic preservation grants . . . before they are submitted to the legislature.”
 - d. Section 90-1-120(2), MCA, which directs the Council to work with the Department through its state trade expansion program or an equivalent program “to improve funding for and access to supportive services for rural-based, veteran-owned, minority-owned, and women-owned businesses.”
 - e. Section 90-1-132(2)(a), MCA, which directs the Council to work in conjunction with the State-Tribal Economic Development Commission to “oversee use of proceeds to expand tourism activities and visitation in the Indian tourism region.”
 - f. Section 90-1-164(2), MCA, which directs the Council to work in consultation with the Heritage Preservation and Cultural Tourism Commission to create a “heritage and cultural tourism promotion and development plan.”
4. **COMPOSITION:** Pursuant to § 2-15-1816(2), MCA, the Council consists of “not more than 9 members appointed by the Governor from Montana's private sector travel industry and includes at least one member from Indian tribal governments and one tribal member from the private sector, with representation from each tourism region initially established by executive order of the Governor and as may be modified by the council[.]”

Members of the Council shall serve staggered 3-year terms, subject to replacement at the discretion of the Governor. See § 2-15-1816(3), MCA.

5. **ELECTION OF OFFICERS:** At the last meeting of the fiscal year, the Council shall elect a Chair and Vice Chair from its current members to serve during the upcoming fiscal year. The Chair shall preside at all Council meetings and hearings, call special meetings, and perform the duties normally conferred by parliamentary usage on such presiding officer and other such duties as may be properly prescribed. The Chair shall appoint members of committees and committee chairs. The Chair shall serve on the Executive Committee and as an ex-officio member of all other committees. The Chair is the only TAC member authorized to speak publicly on behalf of TAC, including in response to media requests, and may do so after consulting with the Department’s Director of Communications and the Department’s Destination MT Division Administrator.

In the absence of the Chair, the Vice Chair shall perform the duties of the presiding officer. Should the Chair position become vacant for any reason, the Vice Chair will complete the

remainder of the Chair's term. Should the Vice Chair position become vacant for any reason, such office shall be elected at the next regularly scheduled meeting by a majority of the Council.

6. **MEETINGS:** A "meeting" of the Council occurs whenever a quorum of the Council members convenes, whether corporal or by means of electronic equipment, to hear, discuss, or act upon a matter over which the Council has supervision, control, jurisdiction, or advisory power. See § 2-3-202, MCA.
- a. **FREQUENCY:** The Council generally will meet three times annually, subject to available funding. Additional Council meetings may be held if the Council and the Department's Destination MT staff determine additional meetings are necessary. The Council shall set meeting dates as far in advance as practicable in coordination with the Department's Destination MT staff.
 - b. **LOCATION:** The Executive Committee will make recommendations to the Department's Destination MT staff regarding Council meeting locations, which are subject to available funding and Section 13, below.
 - c. **NOTIFICATION AND PUBLIC PARTICIPATION:** The Council shall ask the Department's Destination MT staff to send a notice of the proposed Council meeting, along with the proposed agenda of the proposed Council meeting, to all Council members. The Council also shall ask the Department's Destination MT staff to publicly post notice of the Council's proposed meeting and agenda on the Council's website up to 72 hours, but no less than 48 hours, in advance of the proposed meeting. All meetings of the Council shall comply with Montana law as it applies to public meetings and notice requirements. The Council also shall comply with the Department's Policies and Objectives in Providing Citizen Participation. See Admin. R. Mont. 8.2.201 to 8.2.207.
 - d. **QUORUM AND PROCEDURE:** A quorum of the Council shall consist of a majority of the members appointed by the Governor to the Council. The rules contained in the most current edition of Robert's Rules of Order shall generally guide the conduct of all meetings. All meetings shall be open to the public and located in a place accessible to the public, including via remote access, except when the Chair closes the meeting for a discussion of the Council relating to a matter of individual privacy or litigation in which the Council is or may be a named party, pursuant to § 2-3-203, MCA. The Department's Destination MT staff will direct and supervise the recording of each Council meeting and make the recording available for public inspection, consistent with Montana law. See § 2-3-212, MCA.
 - e. **ORDER OF BUSINESS:** The order of business at regular Council meetings shall generally follow the agenda published prior to the meeting, but may be modified by a majority vote of the members present. Only those items included on the agenda and that are part of the materials distributed to the Council prior to the meeting may be acted upon at that meeting. New business may be introduced without prior notice for the purpose of general discussion, for placement on the agenda for Council action at a future meeting, or for referral to a committee or to the

Department's Destination MT staff on the advisability of conducting a study or other consideration.

- f. **PUBLIC COMMENT:** Members of the public may address the Council in accordance with § 2-3-103, MCA, and subject to any reasonable time restraints imposed by the Chair. Specifically, members of the public may address the Council: (i) prior to the Council taking action on any item noticed on the meeting's agenda; and (ii) at the end of a meeting on any public matter that was not noticed on the meeting agenda but that is within TAC's jurisdiction. Public comment received at a TAC meeting must be incorporated into the official minutes of the meeting.
 - g. **VOTING:** The affirmative vote of a majority of TAC's members present and casting a vote is sufficient for the Council to act. Proxy votes will not be permitted. Any member who has a conflict of interest, as defined in Section 11, below, shall disclose the existence of a conflict and refrain from discussing or voting on the action item.
7. **RESPONSIBILITIES:** The Council has determined that the responsibilities of a Council member should include the following:
- a. Regularly attending Council meetings, committee meetings, and other important meetings related to the Council's work in person or virtually. Members may be excused from attendance by the Chair upon prior notice to the Chair.
 - b. To stay informed on your Region, the Council recommends that each year its members attend at least one (1) Regional DMO meeting or one (1) Convention and Visitor's Bureau meetings.
 - c. Actively participating in Council work.
 - d. Maintaining a clear understanding of the regulations, guidelines, and procedures the Department has adopted on TAC's behalf in the Administrative Rules of Montana, as well as TAC's internal policies.
 - e. Maintaining a clear understanding of the way in which Montana law directs the distribution of Montana Lodging Facility Use Tax funds.
 - f. Volunteering for and accepting assignments from the Council and completing them thoroughly and on time.
 - g. Staying informed about Council matters, preparing for Council meetings, and reviewing and commenting on Council minutes and reports.
 - h. Building a collegial and professional working relationship with other Council members and Department staff.
 - i. Attending the annual Governor's Conference on Tourism.

- j. Timely submitting travel expenses for reimbursement. Members are reimbursed at State rates after meetings have been attended, subject to available funding.
 - k. Council members who repeatedly fail to attend Council meetings or fulfill their responsibilities may be removed from subcommittee assignments, at the discretion of the Chair, and from the Council, at the discretion of the Governor.
8. **COMMITTEES:** The Council has established the standing committees described below and may establish ad hoc committees from time to time as determined necessary by the Council. Members of each committee shall be appointed by the Chair to serve one-year terms. Committees may present recommendations on action items to the Council, but Committees are not authorized to take specific action on behalf of the Council. Committees may communicate with the Department's Destination MT staff and relevant Montana organizations for input on topics, but only committee members may vote on recommendations to be brought before the full Council.

In no event may the Council delegate its statutory duties, rights, or obligations to a committee. Committee assignments shall be reviewed annually by the Chair after the first meeting of the fiscal year.

The Council's Standing Committees include the following:

a. EXECUTIVE COMMITTEE

- i. The Executive Committee shall review agenda items and industry topics in advance of Council meetings and evaluate Council meeting locations.
- ii. The Executive Committee shall consult with and advise the Department's Destination MT staff on administrative matters that arise between Council meetings. If substantive matters arise, the Executive Committee may call a special meeting of the Council.
- iii. The Executive Committee shall be comprised of the current Chair, Vice Chair, and one other current Council member in good standing appointed by the Chair.
- iv. The Executive Committee may consult with Council members to identify leadership potential within the Council and recommend a slate of officers and identify a potential succession plan for the Council.

b. MARKETING COMMITTEE

- i. While all TAC members are to read and comment on DMO Plans, including initial budget estimates, the Marketing Committee must become familiar with the DMO Plans, provide preliminary feedback, verify that requested changes are made, and provide recommendations to the full Council. Marketing plans are submitted electronically and reviewed by Marketing Committee members who offer feedback within two weeks. Then a Marketing Committee conference call is held to make

recommendations two (2) weeks prior to the next TAC meeting. During that next TAC meeting, the full Council will vote on the Marketing Committee's marketing plan recommendations in accordance with §§ 15-65-122(2), MCA. The Marketing Committee Chair shall coordinate with and advise the Department's Destination MT Compliance Specialist on the plan presentation format prior to the TAC meeting. After TAC approves a DMO's annual marketing plan in accordance with §§ 15-65-122(2), MCA, if the DMO's proposed budget changes based on new information the Marketing Committee may recommend that the full TAC vote to accept those budget changes at its next meeting. The Marketing Committee shall also review the annual DMO Plan Evaluation Reports. The DMO Plan review may require Marketing Committee members to work for up to 24 hours of time in a condensed period of one to two weeks.

The Marketing Committee shall review the preliminary screening of DMO audits (financial review of marketing expenditures) to bring recommendations for approval to the full Council. This occurs throughout the calendar year as the Department's Destination MT Compliance Specialist completes them. The committee can review in batches as available but should have recommendations ready two weeks in advance of the next TAC meeting. The Marketing Committee Chair shall report on activity and present action items at Council meetings.

c. RESEARCH COMMITTEE:

- i. The Research Committee works with the Institute of Tourism & Recreation Research ("ITRR") in reviewing possible tourism-related research projects and brings recommendations to the full Council. The Research Committee Chair works closely with ITRR.
- ii. Research Committee members spend approximately 15 hours reading and prioritizing the annual list of research project requests. A Research Committee meeting is held prior to the applicable Council meeting to review and narrow down the project list.
- iii. After the Research Committee prepares its initial list of research projects, ITRR provides a budget for TAC's prioritized projects. Research Committee members should prepare in advance by spending about 1 hour reading the proposals as well as approximately 2 hours on phone calls to finalize the Research Committee's project recommendations. Research Committee members will recommend projects to bring to the full TAC for approval.
- iv. Throughout the year, the Research Committee reviews draft project reports prior to publication, which requires approximately 1-2 hours per report of the 4-8 reports each year that require review.

- v. Every 4-5 years, Research Committee members participate in a full-day Research Retreat, either on location prior to a particular TAC meeting, at the University of Montana in Missoula, or at some other site as decided by ITRR and the Research Committee Chair.
- vi. ITRR coordinates setting up meetings, as directed by the Research Committee Chair. The Research Committee Chair shall report on activity and present action items at regularly scheduled Council meetings.

d. RULES AND PROCEDURES REVIEW COMMITTEE:

- i. Every two to three years, or as needed, the Council advises the Department on the need to update the regulations, guidelines, and procedures the Department has adopted on TAC's behalf in the Administrative Rules of Montana. The Council may do so with input from representatives from the DMOs and in consultation with the Department's Destination MT staff and legal counsel.
- ii. The Council also may act as needed to update its own internal policies and procedures pursuant to Section 10, below.
- iii. The Rules and Procedures Review Committee assists the Council in completing this work, including by: (i) drafting proposed updates or changes for the Council's consideration; (ii) making recommendations to the full Council on necessary changes; and (iii) identifying the appropriate timing for TAC to initiate its review of regulations, guidelines, procedures, or other internal TAC policies.

- e. AT-LARGE COMMITTEE MEMBERS: The Chair may appoint to standing and ad hoc committees ex-officio, nonvoting members from interested parties, including without limitation DMO representatives, the Department's Destination MT staff, informational participants, and ITRR liaisons.

9. **EXECUTION OF DOCUMENTS:** When documents must be executed on behalf of TAC, the document shall be signed by the Chair, or in the Chair's absence, the Vice Chair. If neither the Chair nor the Vice Chair are present, documents may be executed on behalf of TAC by the Department's Destination MT staff or another member of the Council with the prior written consent of the Council Chair.

10. **AMENDMENT OF OPERATING POLICY:** Amendments to these policies may be proposed by any member of the Council. Proposed amendments may be considered and approved at a regular Council meeting, after being reviewed by the Department's Office of Legal Affairs. All members of the Council shall be informed of any proposed amendments in writing at least 72 hours prior to a vote being taken.

11. **CONFLICT OF INTEREST:** No member of the Council shall participate in any decision relating to TAC contracts or grants that affect his/her personal interests or the interests of any organization or association in which he/she is, directly or indirectly interested, or has any personal or pecuniary interest, direct or indirect, in the contract or the proceeds thereof. As

applied here, the term “participate” includes making motions, seconding motions, and voting. A Council Member who is also a voting DMO Board Member must abstain from voting for that DMO’s annual plan and audit.

12. **TESTIFYING AS A COUNCIL MEMBER:** The Council is not charged with advocating for or against legislation. A Council member desiring to advocate for or against legislation generally must do so as a private citizen on the member’s own time and on his or her own behalf. When advocating (testifying or lobbying) as a private citizen, the Council member is not entitled to compensation or travel reimbursement from the State.
 - a. On occasion, and with prior approval of the Governor’s Office, Council members may be authorized to testify for or against legislation that is within the Council’s subject area. A request to the Governor’s Office for approval of a Council member to testify in support of or against legislation on behalf of the Council requires a motion passed by the Council. Once approved by the Council, the request to the Governor’s Office must be made to the Department’s Destination MT Division staff, who then communicate with the Department’s Deputy Director and/or Director as needed. The request for approval should explain why the legislation is important to the Council, the substance of the testimony, and how it impacts the Council’s subject area.
 - b. When authorized by the Governor’s Office to testify on behalf of the Council, the member is acting in the performance of Council duties and may be entitled to reimbursement for travel pursuant to Section 13, below.
 - c. Always remember that when a Council member testifies before a legislative committee, the member should expressly state whether he or she is appearing as a private citizen or on behalf of the Council.
13. **TRAVEL REIMBURSEMENT:** Council members serve without pay; however, traveling to Council meetings and other travel for Council purposes as authorized by the TAC Chair and Destination MT staff generally will be reimbursed in accordance with § 2-18-501, MCA, and as follows, subject to available funds and the most current version of the State’s published travel reimbursement policies.
 - a. **LODGING** is reimbursed using State rates or by using the pre-arranged room block provided by Destination MT. Individuals will be reimbursed at actual cost, including taxes, up to the published State rate. A receipt indicating payment in full is required from the lodging establishment.
 - b. **TRANSPORTATION** by automobile is reimbursed by payment to the personal vehicle’s owner at the established State mileage rate. Transit expenses require receipts. Ride and cost-sharing is encouraged.
 - c. **MEALS** are reimbursed at a set per diem based on the State’s published travel policies. See the Travel Expense Form provided by staff for details and current State per diem rates. Travel advances are not permitted. Breakfast or lunch provided complimentary by a lodging establishment or included in TAC meeting agendas are not per diem reimbursable.

- d. OTHER EXPENSES without receipts are reimbursed up to the allowable amount determined by the State's published travel policies.



FY23 DMO Narrative Reports



Grant Details

Grant: 23-51-041 - FY23 Belgrade CVB DMO Plan - FY23

Status: Underway
Program Area: DOC Office of Tourism
Grantee Organization: Belgrade Chamber of Commerce
Program Officer: Barb Sanem
Awarded Amount: \$106,864.00

Narrative Evaluation

In FY23 our DMO was without leadership from January until the end of the fiscal year. Current leadership came into the role of managing the Belgrade DMO after FY23 was concluded.

Although some of the metrics were achieved when it came to social media and CTR via the website all of the photo and media library's were not created. There were funds allocated and spent to Hagadon Media for digital and Facebook campaigns. Although I do not have results of those campaigns. Our organization has since changed website hosts, design and content marketers.

In conclusion, this past year wasn't very active for the Belgrade DMO, espically after November 2023, giving new leadership the opportunity to improve with the hope of reallocated funds.



Grant Details

Grant: 23-51-042 - FY23 Visit Big Sky DMO Plan - FY23

Status: Underway
Program Area: DOC Office of Tourism
Grantee Organization: Visit Big Sky
Program Officer: Barb Sanem
Awarded Amount: \$1,144,292.00

Narrative Evaluation

Visit Big Sky continues to make inroads into being a leader in marketing efforts for our partners and establish a healthy visitor economy in Big Sky. Year over year Visit Big Sky tries to meet the needs of our stakeholders and we've accomplished that in three defined categories:

1) Relevant On-Target Data: Our investment in research is timely and state of the art. Big Sky launched a direct source data system that gives us daily lodging data for over 1400 rooms on a nightly basis. We can look ahead and see into the future regarding booking demand and pricing. Our lodging partners bring this data to support our industry and support our restaurant and retail industry to plan accordingly. We see this as part of our trust with the community to support the tourism industry in Big Sky. Without visitors we don't have an economy and we do everything we can to support the partners to be successful.

2) Targeted marketing efforts to bring the right visitor to Big Sky: In today's tourism economics we're able to use pin-point advertising delivery to visitors where they live and where they've visited in the past. The days of buying a magazine ad and hoping it get's in front of the right eyeballs is no more. As an example we're doing campaigns directed to a group of skiers in the Bay area that frequent Lake Tahoe skiing but also have traveled to Colorado is our target audience. With our increased flight lift into Bozeman/Yellowstone Airport we're able to make our marketing effective by going after that visitor who get's on a plane and willing to fly to a destination. More so we're able to target a skier who has the IKON pass that is accepted in Big Sky and hundreds of other resorts around the world. We play on the fact that "Big Sky" is easy to get to, and we have one of the best ski areas in the country.

Our internal efforts have grown and the investment in additional staffing to support our efforts as well as be a convener with our partners in Big Sky is key to our role in the community. When you have big partners like Big Sky Resort, The Montage and national property managers our job is to support them in their efforts to make everyone's marketing dollars go farther.

Our media/public relations contractor is amazing and we're finding our investment in media has a longer and better impact than our marketing efforts. Big Sky is the shiny new penny in the skiing marketplace and we find ourselves being compared to Aspen, Vail, Whistler Blackcomb and Park City. Our large hotel investments is putting us in the space as a luxury destination and our efforts to wrangle parnters and makes sure we're delivering the expectation that our visitors expect.

3) Destination Strategy: Destination Management is a priority for our office and our community. Due to Covid we saw all the ill earned gains of "over-tourism" and the community is pushing back regarding our tourism economy. Visit Big Sky like many destinations is now working to get in front of this and lead a meaningful conversation about our future in tourism and how we find a compromise between residents and the visitors. We started late in FY23 due to our contractor not having the bandwidth but we're now moving forward and it's been worth the wait. The community wants to be a part of our long term planning and we've had very good attendance and great diversity of stakeholders.

Our efforts over the last year with public bathrooms, updated wayfinding and our efforts for wildfire education are just small pieces to our overall destination management efforts.

Visit Big Sky thanks the Tourism Advisory Council for their ongoing support.

For Visit Billings, FY23 was overall a successful year for the team, stakeholders, partners, and the marketing and sales strategies outlined for Visit Billings as a Destination Leadership Organization (DLO).

Smith Travel Research reports, which offer benchmarks Visit Billings' uses to evaluate the citywide performance of hotels and motels in the city of Billings, reflected a strong year in room demand. Citywide room demand increased 6.1% over 2021 (Smith Travel Research (STR)). There was concern heading into FY23 regarding how travel was going to be impacted following historic June flooding in and around Yellowstone National Park (YNP) as well as in and around Yellowstone County. Flooding closed YNP entrances most accessible from Billings (NE and N gates) as well as sections of the scenic Beartooth Highway which is part of the Visit Billings' Great American Road Trip (GART) national campaign touting road trip itineraries which include national monuments and parks stretching the region and include Billings as an urban stop along the way. National headlines that tended to deem Montana as closed for business, wreaked havoc on stakeholder booking reports and so it was important for Visit Billings to quickly adjust warm season marketing strategies which had already been in play on national and regional levels since April 2022.

Fortunately, as Visit Billings staff monitored monthly and weekly STR reports which offer insights to trends as well as direct impacts of certain meetings, sporting events, or leisure events on the destination, demand was only briefly impacted and seemed to rebound well. STR reports allowed Visit Billings staff to monitor and continue to track data sets including Occupancy, Room Demand, and Average Daily Rate to help foster strengths and successes of the GART and events campaigns impact. This is a continued strong investment of Visit Billings (Billings CVB) funds.

Annually, the team works to witness an increase in room demand by 3% in a running 12-months of the year which Billings met in FY23 at 6.1% growth. For reference, the following are room demand percentages for running 12-month periods for previous years and the year being reported here which was 2022:

- 2017: 0.6%
- 2018: 4.9%
- 2019: -1.9%
- 2020: -26.6%
- 2021: 34.1%
- 2022: 6.1%

Billings CVB funds support the Visit Billings contract with Smith Travel Research for the monthly and weekly citywide reports. This investment is key and remains active in the current FY24.

PAID MEDIA

GREAT AMERICAN ROAD TRIP (GART)

Metrics achieved were reported for the GART campaign in the Webgrants section/columns. All goals were met, and the campaign was deemed successful by staff, buyers, and the agency of record. While the GART webpage and elements of the campaign will continue to have a level of presence in Billings' destination marketing, the warm season marketing for 2023 has since been refreshed with new creative briefs and strategies. However, for the 2022 seasonal GART campaign in FY23, creative included Rick the Dog, which was fun, lighthearted, and well-received. It focused on the many ways to enjoy Billings through the magic of Rick the Dog with the tagline as ***Billings – approved by dogs for humans***. Rick Tips

and Rick Toks on TikTok were part of the strategies and helped visitors plan for and then enjoy the best vacation ever.



Fun video accessible here:

<https://www.facebook.com/sunshineandbourbon/videos/meet-rick-the-latest-animal-ambassador-for-our-client-partner-visit-billings-ric/816390772575021/>

More here: <https://www.visitbillings.com/great-american-road-trip>



REGIONAL EVENTS CAMPAIGN TO COMPLIMENT NATIONAL GART STRATEGIES

As noted in the reporting previously, taking into consideration the devastation the regional floods in and around Yellowstone caused (with the N and NE entrances closed), higher flight costs, high gas costs and inflation, Visit Billings needed to adjust strategies around travelers looking for a vacation destination focusing on culture and events that could take place within the market either taking more time to get to Yellowstone's remaining open entrances (S, E, W), or simply re-routing and maintaining Billings on

itineraries to preserve stays to Billings and to perhaps engage for longer stays in market to maintain room demand.

Visit Billings focused on destination strengths that would complement Great American Road Trip (GART) enthusiasts since so much of the GART creative and placements had already been placed prior to the June 2022 flooding. As noted, combatting national headlines that Montana was closed due to the flooding was of great concern to Billings staff and the agency to ensure proper messaging that Billings was a destination ready for visitors and that the region was open and accessible.

Re-alignment of marketing strategies and focus included:

- Billings has a rich array of events to offer travelers. Leveraging those events while showcasing all the cultural, culinary, and outdoor experiences that can round out a trip to Billings is exactly what certain travelers sought - after years of not being able to go to large-scale events due to social distancing and closures to closest YNP entrances due to flooding these offerings communicated options and opportunities to travelers.
- Nothing can stop your trip to Billings. Not a major natural event or a pandemic crisis. Messaging voices that the destination was open for business and ready for visitors. This idea celebrated a non-stop event schedule, while nodding to the “can’t stop, won’t stop” attitude that has built the city.

Research and key takeaways for this events-focused campaign included:

- For Millennial and Gen Z-aged travelers—who had stronger interests for a more diverse set of experiences overall which at the time included festivals and special events (75.2%), big city experiences (74.3%), arts and culture (70.8%), and theme and amusement parks (75.5%) are much more attractive (relative to older travelers).
- High gas and jet fuel prices disrupted travel plans for 2022 summer and fall travel, too. At the time, predictions of even higher fuel costs for late summer were taken into consideration.
- However, even with cost concerns, 91% of travelers in spring 2022 did have trips planned for a six-month window of warm season months and at the time only 16% of them said that coronavirus was going to still greatly impact their travel plans which was the lowest level since the beginning of the pandemic. So, the Visit Billings team worked to capitalize and find a balance between making sure travelers knew of accurate information (dedicated web pages promoted on social, home pages, and via e-communications with leisure audiences that spoke to flood updates and COVID information was still available) while offering options to still make the trip with amazing options like MontanaFair, concerts, and sports events like Big Sky Ballin’ 3x3 street basketball tournament.

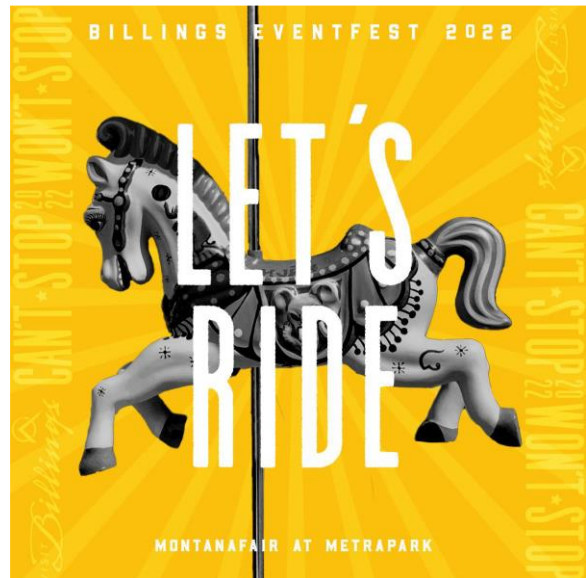
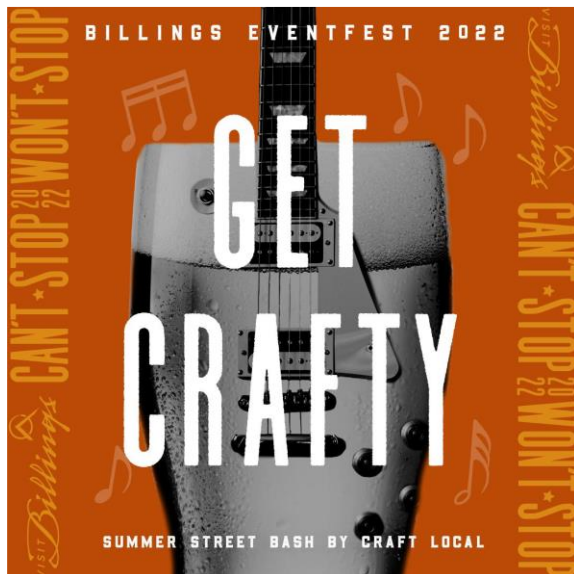
REGIONAL EVENT CAMPAIGN - TARGET AUDIENCE

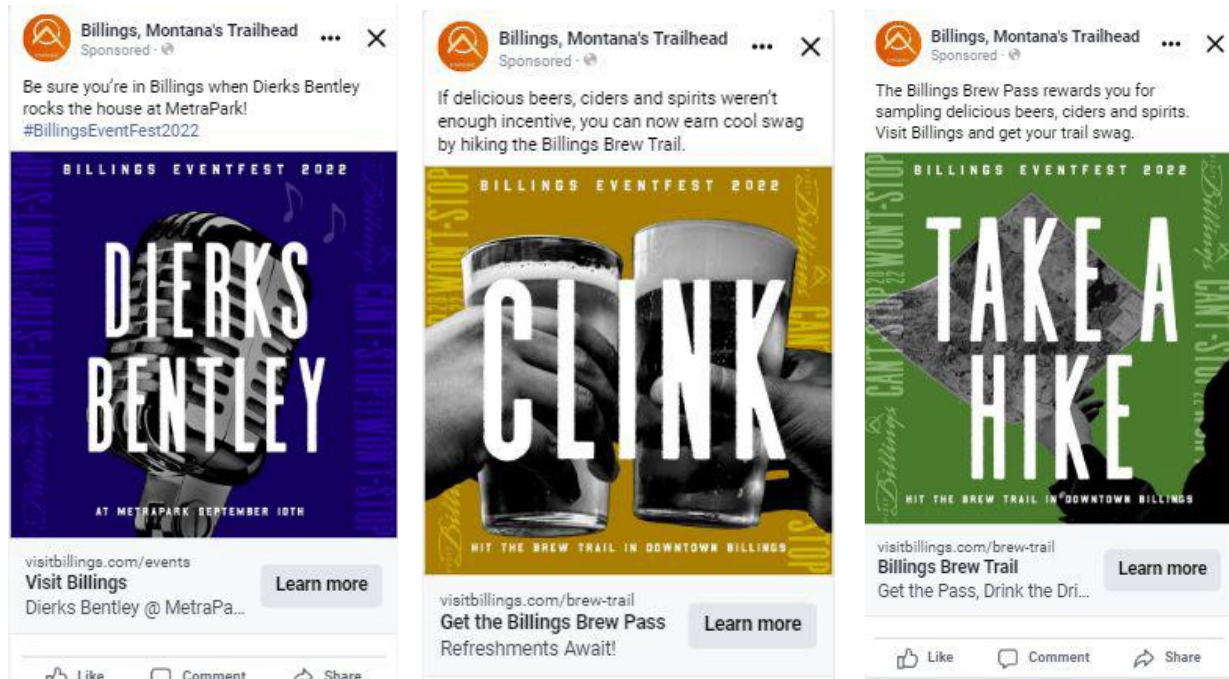
Visit Billings strategies focused on adults 25+ who have an annual household income of \$75k+.

Focused on couples, friends, empty nesters eager to travel and families looking for weekend and week-long getaways. Target in-market behaviors for Beer Trail, Events, What’s on, Shows, Outdoor Enthusiasts, Sightseeing, Sporting Events and Farmers Markets. They’ve traveled to Montana in the past 12-months.

The team also focused on geo-targeting like regional drive markets, within in-state and neighboring states: Montana (excluding city of Billings), North Dakota, South Dakota, Wyoming, Idaho

Creative examples for the events campaign:





July 20 – October 31, 2022: Website analytics for events campaign:

All Traffic:

- 113,519 SESSIONS
- 57.08% BOUNCE RATE
- 29.22% CONVERSION RATE - (percent of organic users who requested a guide, signed up for newsletter or stayed on site for at least 3 minutes)
- 01:40 AVG. SESSION DURATION
- 96 NEWSLETTER SIGNUPS
- <https://www.visitbillings.com/events>

Top Metro Markets for all traffic for this campaign included **Chicago IL, Denver CO, Dallas-Ft. Worth TX, Salt Lake City UT, Minneapolis-St. Paul MN, Phoenix AZ, Seattle-Tacoma WA, Minot-Bismarck-Dickinson ND, Butte-Bozeman MT.**

Other paid media efforts for FY23 that proved successful and will be part of the mix in future investments included:

- Yellowstone Journal
- RoadRunner
- Great American West
- Montana destination visitor guides like Destination Missoula and Glacier Country Tourism guidebooks
- Visit USA Parks
- Brand USA

Highlighting the Visit USA Parks investment, the report on the partnership was positive as impressions and leads both exceeded campaign deliverables of 150,000 and 2,000, respectively. The cost per click of \$0.13 was well below the travel/hospitality industry average of \$0.63. The variety of images and copy highlighting fall experiences in Billings was the most successful of the content. Finally, states that generated the most leads were Texas, California, Florida, Missouri, and Illinois with Florida being the state that had the highest click-through rate of the states that generated the most leads.

Of course, all placements are in partnership with the Visit Billings agency of record Sunshine and Bourbon and buyer Goodway Group who assist with strategies, briefs, creative, etc. Billings CVB funds also support the Visit Billings Leisure Marketing Director's position.

As far as leads are concerned, Visit Billings staff foster leads. Additionally with the Yellowstone Journal guide requests, visitor guides are mailed to thousands of prospective visitors annually using Billings CVB funds for fulfillment/postage. Speaking of fulfillment, contracts with Certified Folder remain a top priority to help make visitor guides available. Design and print of the 70,000 Visit Billings visitor guidebooks are paid for with private funds then Billings CVB funds support the shipping and fulfillment. It's a strong reciprocal means to manage the project, publications, and fulfillment.

One other proof of performance worth noting is the continued efforts in the two-wheel or motorcycle market for Billings.

TWO-WHEEL DRIVE EXCITEMENT – WHY?

This market is extremely important to Billings. Billings is a proven stop along the itineraries of motorcycle enthusiasts across North America for many reasons including access to amazing byways and rides as well as proximity to Sturgis.

The Beartooth Scenic Byway continues to help grow the two-wheeled market. The 68-mile stretch of U.S. Highway 212 has been described as “the perfect definition of what a great bike ride should be” by National Geographic and is consistently in the Top 10 best motorcycle rides in the U.S. The Great American Road Trip campaign builds awareness of the destination's proximity to the most scenic route into Yellowstone National Park, aligning with the 2-wheeled market which is drawn to curvy roads, riding long distances, and experiencing the epic journey.

National parks are key drivers of visitation in this segment as is the destination's position along the I-90 and I-94 corridor to and from Sturgis every summer. FY23 plans included additional sponsored content development and niche digital targeting of the two-wheel audience.

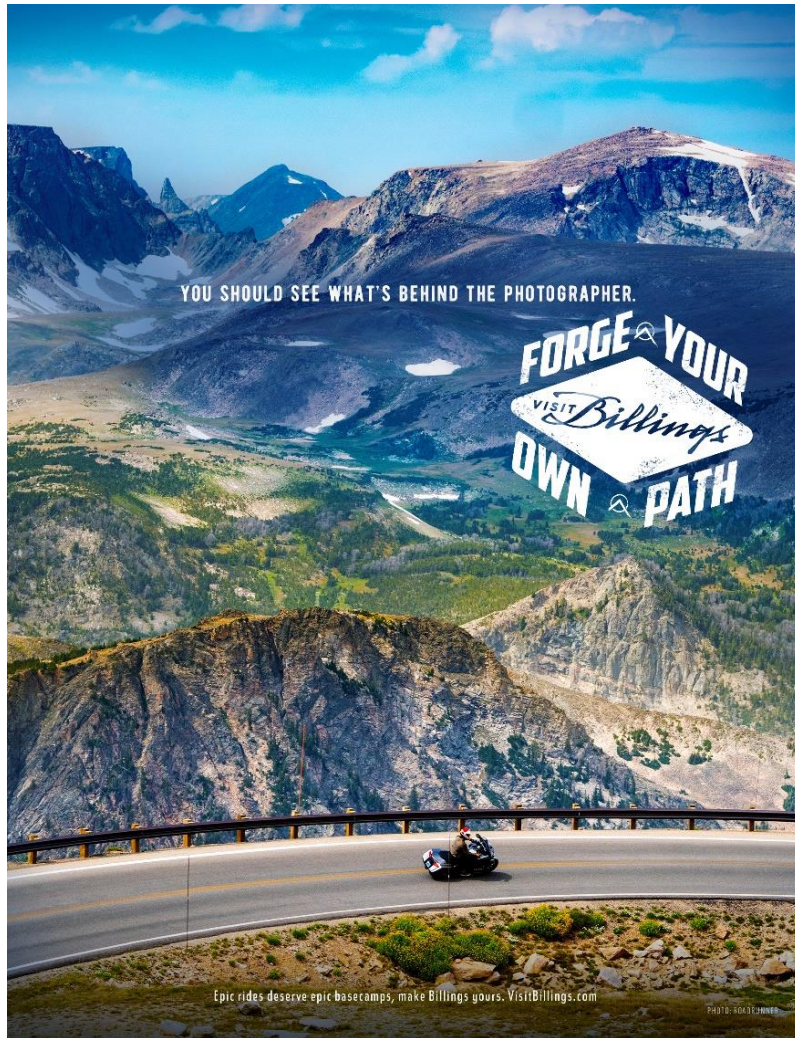
Billings' hospitality amenities and access to surrounding Big Sky Country roads elevate its position with groups like BMW Motorcycle Owners of America, Gold Wing Road Riders Association, Harley Owners Group, and Yamaha Star Motorcycles. V

Visit Billings saw success in drawing the two-wheel audience with publications like RoadRUNNER Magazine and having a presence at Sturgis Bike Rally. Finally, one other note, Billings was the proud host of the 2022 InZane Rally which is part of the Valkyrie motorcycle brand family.

DISPLAY RESULTS for RoadRUNNER:

- 2,124,842 impressions and 111 visits to the Roadtrippers landing page:
<https://www.visitbillings.com/roadtrippers>
- Display eCPA averaged \$75.51, most likely due to the campaign's mid-month launch and troubleshooting the 2 Wheel pixels prior to Memorial Day weekend.
 - Since troubleshooting the Roadtripper and Forge Your Own Path pixels, stronger eCPA was realized as the campaign entered June.
 - Best performing tactic: Retargeting Display – XDRT
 - Retargeting displayed the strongest eCPA of \$0.56, though the Behavioral Targeting line showed the most eCPA activities (84). Based on this observation, users within the retargeting pool and/or behavioral audiences were overall more likely to convert.
- Top performing markets:
 - Minneapolis-St. Paul MN
 - Omaha NE
 - Fargo-Valley City ND
- Top eCPA activity: GART Landing Page:
 - Overall activities surged upon campaign launch 4/11 and began to trend upward throughout the remainder of April as the warmer season accommodates more outdoor-based activities and travel. We did see an influx in activities the second week of the campaign (4/17-4/24).
- In terms of Creative Performance, ad sizes 300x250 and 320x50 reflected the strongest performance, as they appeared to be driving the most clicks and activities whilst holding the strongest eCPA during the run.
- The strongest performance was seen within a few motorcycle brands, as well as users who identify as motorcycle owners or possess an affinity for motorcycles:
 - Audiences > Interest > Vehicles & Transportation/Auto Enthusiasts/Motorcycle Enthusiasts
 - Interest > Automotive > Motorcycles > Brand > Honda
 - Interest > Auto - Owners > Auto - Owners - Motorcycle > Auto - Owners - Motorcycle – Kawasaki
 - 180byTWO > LOCi Mobile Audiences > Motorcycle In Market > Harley-Davidson
 - 123Push > Consumer > Vehicle Owners > Motorcycle Owners – Extreme Confidence
- Top performing markets:
 - Minneapolis-St. Paul MN
 - Sioux Falls(Mitchell) SD
 - Omaha NE
 - Lincoln & Hastings-Kearney NE
 - Rapid City SD
- Optimizations made included focusing on venues pertaining to outdoor and roadside travel such as gas stations & convenience stores, highways, and recreational locations and rest stops.

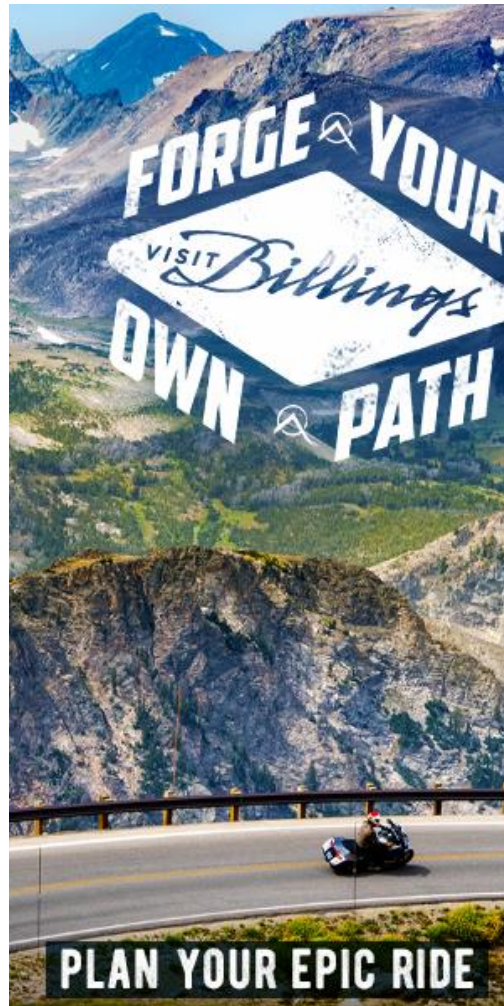
Print: RoadRunner Magazine; July/August Issue - full page, pg. 81; Readership: 222,521; July Newsletter banner: 42,771 subscribers



Print above:

Digital options below:





FY23 PR RECAP

While the FY22 public relations program featured more traditional tactics for travel/tourism media like press visits and in-market activations, it was inflation and market conditions dictating a nimbler approach for FY23.

Pilot shortages and fewer flights into Billings Logan International Airport caused an increase in airfare, somewhat limiting Visit Billings' fiscal ability to host journalists on press visits. And with leisure travel returning to near-normal levels, travel journalists were mired in a deluge of pitches and invitations from destinations springing back to pre-COVID best practices for leisure travel PR, further cluttering an already competitive market.

With these factors in mind, the team developed a plan that expanded outreach to a wider audience of journalists and influencers, but that leveraged digital experiences and content to limit the expense of multiple in-market press visits or FAM tours. Additionally, outreach topics were focused more specifically on some of the primary visitor profiles as defined by the Forge Your Own Path campaign: foodies and craft beer enthusiasts, family travelers and outdoor adventurers.

SUMMARY OF FY23 PR EFFORTS

VIRTUAL BRIEFINGS

Visit Billings representatives and local stakeholders met with more than 10 journalists covering topics of the Billings Brew Trail, family travel, outdoor adventure and culinary experiences. These briefings not only generated immediate coverage for the destination as listed below, but also served to establish relationships with key journalists and influencers for future outreach efforts.

SEASONAL AND EVENT PITCHES

Information about seasonal travel to Billings as well as events taking place within the city at different times throughout the year were shared with regional media and influencers. These events and travel ideas were bucketed into three seasonal categories: fall, winter and spring/summer. The result of this outreach was additional interest from journalists and influencers in a virtual briefing and/or future press visit.

OPPORTUNISTIC OUTREACH

This type of media engagement is based on reacting to trends or journalist requests for information. Highlights of opportunistic outreach include pitches to USA Today, The Zoe Report and Fandillo.com. Opportunistic outreach has resulted in pending coverage as well as requests for future information and visits to the destination.

LIMITED PRESS VISIT(S)

Although press visits were not a part of the core public relations plan, requests for visits resulted from other tactics where journalists expressed a desire to experience Billings firsthand. As a result of FY23 outreach, Visit Billings completed one press visit (placement/coverage pending) and is planning another for FY24.

ADDITIONAL ACTIVITIES

Along with direct outreach to media, additional activities from the public relations plan called for the creation of several b-roll packages categorized by interest (outdoors, art and culture, food, etc.). These video packages will enable more outreach to broadcast media, as well as the creation of more virtual experiences that highlight the destination for influencers.

Further, to establish synergy with the summer 2023 paid media campaign promoting Billings events, public relations efforts include the development of organic social media posts that complement paid media for Visit Billings profiles. This low-cost tactic ensures greater reach of the summer events creative among the audience of social media followers Billings has acquired.

ANALYSIS OF RESULTS AND KEY TAKEAWAYS

Additionally, the overall quality of FY23 earned media coverage was greater than FY22, considering more placements are feature stories solely covering Billings, whereas past years' placements have largely been round-up stories in which Billings is mentioned alongside other destinations.

While the pivot to more digital interaction with journalists and influencers yielded significant coverage and established relationships with key writers, in-person experiences are still sought after among media members. Many of the journalists targeted by the campaign

expressed interest in Billings, but noted they do not cover any destination they haven't visited personally. This is an insight to consider moving into FY 2024, as the prohibitive costs present at the beginning of FY 2023 have since returned to acceptable levels from a budget standpoint. Nonetheless, as has always been the case, press visits will be carefully vetted to ensure that the investment in hosting a writer will yield value.

Total impressions of confirmed and pending placements exceed 9.4 million, representing a significant increase from FY 2022 (1.5 million).

CURRENT FY24 EFFORTS

Having developed a more solid public relations foundation, FY24 is offering an opportunity to develop a more sophisticated yet similarly cost-effective public relations program. Much of this is underway in the current FY24 beginning with ROI in mind, focusing on the value that public relations can potentially provide Billings as a destination.

JOINT VENTURE EFFORTS

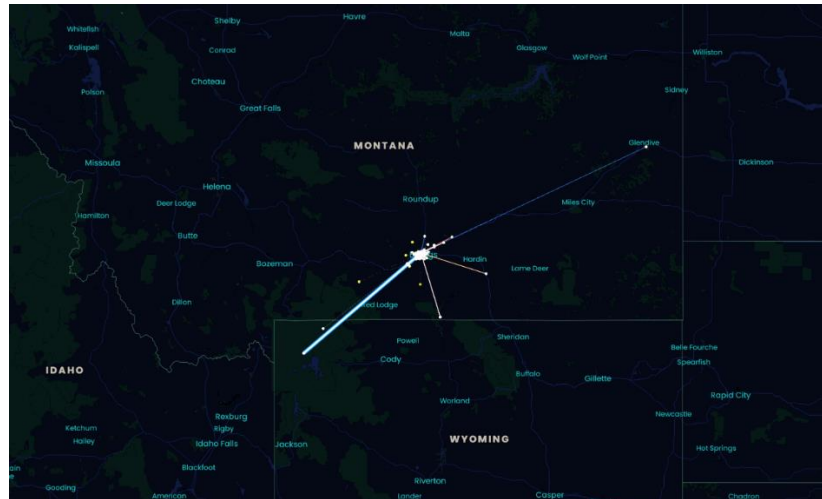
Joint Venture programs are important to Visit Billings' marketing efforts. Sojern placements, data partnerships, and other opportunities with the State and Montana tourism partners like Visit Southeast Montana, Glacier Country, and Destination Missoula will continue to be considered. To reiterate, partnerships with Visit Southeast Montana like the Minneapolis 2022 market takeover will continue to be considered as budgets allow. Opportunities to team up to increase visitation to the southeast region as a whole equates to wins for Billings.

RESEARCH – AirDNA

Visit Billings appreciates the Joint Venture opportunities with research as well. While the organization has a solo contract with Zartico, there are aspects of the statewide data that can be beneficial.

While explanations in the metrics reporting section of Webgrants explain the proof of performance for a continued contract with Zartico at this time, Visit Billings cancelled its contract with AirDNA following FY23. While the AirDNA and short-term rental information is useful, only some stakeholders follow it. Currently, the return on investment isn't plausible. At some point, Visit Billings may engage again, but following FY23 reporting and lack of finding the best way to use the data sets to move the destination strategies forward, the contract was not renewed beyond FY23.

One note, here is the Zartico Starburst for BIL July-August 2022 with some additional insights available through the Zartico dashboard: [Zartico Dynamic Visualization](#)



THE INTERNATIONAL MARKET

Yellowstone National Park and Little Bighorn Battlefield, along with the Lewis and Clark Trail, are key attractions positioning Billings as a trailhead to access Montana's iconic sites. These points of interest make Billings a group-friendly destination for the domestic or international traveler. Billings' proximity to the Beartooth Scenic Byway, as well as the northeast and north entrances to Yellowstone National Park, position the city well as a fantastic stop for a group tour itinerary. The Visit Billings team and stakeholders were fortunate to have a level of group tour business returning in 2022 and we made sure any tour operators who needed assistance regarding the closures of the northeast and north entrances to Yellowstone National Park due to flooding had tools to maintain trips with slight adjustments.

Visit Billings attended events to build upon good relationships with domestic and international tour operators by attending events such as ACGI, IPW, and International Roundup, which all helped the team maintain relationships with both international and domestic tour operators post pandemic.

IPW and IRU are supports with Billings CVB funds as well as placements and partnerships with Great American West.

CONCLUSION

As previously noted, FY23 was a strong year for Billings as a destination and for Visit Billings as a DLO. While the product in the Billings destination 'store' is a constant conversation and priority together with other community leadership organizations, along with destination stewardship and long-term strategic planning, at the heart of what the DLO does focuses on marketing and sales. Destination marketing remains key to the success of mission for our partners. Whether the leisure market or sports tourism and meeting recruitment segments, marketing is critical to growing visitation. Stewardship, long-term strategies, development, and management are absolutely part of our core priorities, but hollering from the Rimrocks boasting about Billings and driving traffic to the destination to create repeat visitors, is what the team does best to support mission, stakeholders, and partners. Visit Billings is proud to work closely with Brand MT, the Tourism Advisory Council, state, regional, and national colleagues, and local partners to foster visitation to Montana's largest city. Billings CVB funds are extremely important and appreciated.



Grant Details

Grant: 23-51-044 - FY23 Bozeman DMO Plan - FY23

Status: Underway
Program Area: DOC Office of Tourism
Grantee Organization: Bozeman Area Chamber of Commerce
Program Officer: Barb Sanem
Awarded Amount: \$707,250.00

Narrative Evaluation

Destination Marketing

Our FY23 marketing focus was to support our ten-year investment in direct flight markets, as well as drive markets including Eastern Washington, Idaho, Utah, and the Dakotas.

Although we did not achieve the 20% growth, in FY23, flooding in Yellowstone closed the Park and hindered early summer visitation. Bed tax dollars are still up 5.9% over FY22, and 68% over FY21.

Airport deplanements continue to grow without any sign of slowing. For the year ending October 2023, Bozeman Yellowstone International Airport handled 2,443,948 passengers.

Our website visits peaked in 2022 and while we have seen some slowing, in FY23 our media plan included some strategies that drove awareness but did not necessarily drive direct clicks to the website, (streaming TV, out of home, etc.). Total website sessions came to 754,158, an increase of 8.2%.

Newsletter signups were the most successful to date, exceeding our goal, and collecting 5,884 new contacts.

Social media traffic exceeded expectations and continue to be a strong driver of traffic. Total website sessions from social media equaled 246,946.

*Arrivalist switched their data samples at the end of 2022. The new visitation data is different than the original, so we were unable to measure the travel index of people visiting less than 250 miles.

Destination Stewardship

This year, we partnered with six organizations in a Be Good to Bozeman campaign intended to highlight best practices, principles, and tips for enjoying the outdoors. The campaign included consistent and clear guidelines around outdoor activities and promoted positive local ethics.

Stakeholders included the Downtown Bozeman Association, Bridger Ski Foundation, Outside Kind, Gallatin Valley Land Trust, Friends of Hyalite, and the Gallatin Watershed Council.

The Be Good to Bozeman campaign was highly successful, producing a lot of content, media attention, and positive feedback.

Impressions are estimated at 1.5 million, however, since this was the first year of this type of campaign, it was difficult to project the number of impressions we would garner. In addition, a large part of the campaign included in-person materials, which impressions can't be measured.

Dashboard evaluation to come FY24.

Destination Management

Our objective for destination management in FY23 was to understand the post-pandemic traveler, as well as traveler disbursement, where they are going and what activities they are doing.

We did complete a Resident Sentiment Study and a 2022 Visitor Profile Study.

These two studies have helped shape our Destination Stewardship efforts. In FY24, we are looking at Montana resident's attitudes toward Bozeman in an effort to reignite visitation to Bozeman from other parts of the state.

Butte DMO FY23 EVALUATION NARRATIVE REPORT

Objective: Promote Butte's tourism assets year-round to targeted audiences

STR Data

Demand	2022												2023					
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
This Year	16,731	18,731	23,454	23,032	28,283	32,395	35,117	36,812	35,577	29,872	23,182	19,342	16,363	17,223	22,098	20,379	28,395	31,126
Last Year	14,722	14,338	18,607	21,193	25,852	34,487	36,785	32,934	28,977	24,895	20,050	18,378	16,731	18,731	23,454	23,032	28,283	32,395
Percent Change	13.6	30.6	26.0	8.7	9.4	-6.1	-4.5	11.8	22.8	20.0	15.6	5.2	-2.2	-8.1	-5.8	-11.5	0.4	-3.9

FY22	FY22	FY23	Increase/Decrease
7/1/21-9/30/21	\$599,536	\$660,840	+10%
10/1/21-12/31/21	\$263,430	\$298,815	+13%
1/1/22-3/31/22	\$256,984	\$290,764	+13%
4/1/22-6/30/22	\$448,457	\$452,492	+1%
	\$1,568,407	\$1,702,911	Net 8% Increase

The above data is from STR data-June 2023. It is evident the filming of Yellowstone Series 1923 with most lodging needs beginning in July, and carrying into December had the biggest impact on increases in our reporting hotels, over FY22. Bed tax collections were up for FY23 as the calculation is reflecting increased rate and takes in a larger census of lodging alternatives in the Butte market.

Objective: Continue to gather and utilize inspiring still and video content to be used on all media platforms to capture visitation interest for return or potential visitors to Butte Website

Video and Stills

Butte was able to 187 professional still images from 1923 filming, Uptown Butte and the Mai Wah along with and 11GB of raw drone video of Uptown Butte.

Targeted display

The primary KPI for the campaign was engagement, and cumulatively, the impressions delivered above benchmark (.011% compared to .07%). There has been an uptick in engagement since changing campaign messaging and creatives that went live at approximately the same time as the new website. We did not meet the expectation of .21% partly due to changes in creative and messaging.

Social ads

With updated creatives depending on the season and call-to-action, resulted in increased engagement over time. The campaign was delivering below benchmark for CTR for most of the year as we prioritized reach over engagement. The newest creatives launched at approximately the same time as the new website and contributed to a bump in engagement. Social ads declined in CTR, the benchmark (.90%) and our campaign performed at .69%. It was lower because for most of the campaign reach was prioritized over engagement.

YouTube Un-skippable Banner Ad

For FY23 Butte had 5,085,102 Impressions and 553 clicks. These ads ran throughout Montana, Seattle, Spokane, Salt Lake City and Phoenix markets. The goal was reached for this campaign.

OTT Targeted Market-Spokane

- Impressions served was 140,176.
- 100.25% of the Impression Goal have been served.
- These campaigns paced at 0.25% and met the goal.
- 98.13% average video completion rate is above Compulse and national benchmark of 85%.
- Top publishers include Philo, Samsun TV+ and LG.

Digital Video-Billings & Missoula CDV

- Impressions served was 125,428.
- These campaigns paced at 0.1% and met the goal.
- 100.1% of the Impression Goal have been served.
- 88.67% average video completion rate is above Compulse benchmark of 70%.
- The click-through rate was 0.4%.
- Top publishers include Hulu, Origin Media and Pluto.tv

Display Banners

May

- Impressions served was 83,343.
- This campaign had 96 clicks.
- The click-through rate was 0.12%, it exceeds the target 0.05% CTR.

June

- Impressions served was 83,350.
- This campaign had 55 clicks.
- The click-through rate was 0.07%, it exceeds the target 0.05% CTR.

Website

Prior to mid-August 2022, all paid traffic directed to ButteElevated.com. A new, full website was being setup, but until the site, visitbutte.com was ready a visitbutte.com landing page was created. The new VisitButte.com website launched on June 1, 2023. The data is a culmination of information from ButteElevated.com, the landing page and the new website visitbutte.com. Some discrepancies with the total site traffic exist due to the directional traffic changes, as well as the launch of Google Analytics 4 (GA4), which now tracks “events” instead of pageviews. For this report, events were used synonymously with pageviews increased to 1.76 seconds from 1.45. Reporting was unavailable for seconds on the page.

Date Range	Pageviews	Users	Pageviews	Users	Pageviews	Users
7/2021-6/2022						
7/2022-6/2023						

Increase entertainment industry projects.

Entertainment Industry Projects as tracked through Butte-Silver Bow

Entertainment Industry Projects from Film Permits									
DATE	NAME OF APPLICANT	TYPE OF APPLICATION	START DATE	END DATE	# OF DAYS	# OF TALENT	# OF CREW	TTL PPL	TTL NIGHTS
3/8/2022	Michael McCaffrey	Documentary	4/4/2022	4/5/2022	1.00	1	2	3	3
5/18/2022	Spin Film LLC	Motion Picture	10/2/2022	10/12/2022	10.00	5	15	20	200
6/23/2022	Menage Emmanuelle	Documentary	6/23/2022	6/23/2022	1.00	1	2	3	3
7/7/2022	Daniel Jose	filming commercial	7/9/2022	7/10/2022	2.00	0	1	1	2
8/15/2022	King Street Productions	Motion Picture	8/8/2022	9/23/2022	180.00	20	280	300	54000
9/1/2022	Zach Johaneson	Commercial	9/25/2022	9/25/2022	1.00	8	14	22	22
	Total Calendar Year								54230
5/4/2023	Carley Rainey	Rib n Chop commercial	5/17/2023	5/17/2023	1.00	1	5	6	6
	Total FY23								54030

For the calendar year of 2022 Butte permitted 6 projects, 2 commercials, 2 motion pictures (including Yellowstone Series-1923), and 2 documentaries. From these projects in the calendar year of 2022, 54,230 lodging nights were attributed to these projects.

Fiscal year data for entertainment industry permitted 4 projects, 1 motion picture (1923), and 3 commercials. Lodging nights attributed to these projects: 54,024.

Objective: Increase overnight stays related to events/concerts/special tours

Placer.ai data was not accessible as hoped.

There was one event where data was gathered, see below. However, it is understood people who attended this event could have done so as hotel guests looking for something to do for the evening.

Colt Anderson Dream Big Event Using Placer.ai

850 devices tracked Uptown Butte on the specific area on Park Street, blocked off for the event, some of these devices could also have been Uptown earlier in the day as well. These devices also went to hotels throughout Butte.

Miner’s Hotel 328-12 rooms (possible rooms booked a the Miners)=316 (bar patrons)
Finlen 103-40 (possible rooms booked at the Finlen)=63 (bar patrons)
316+63=379 (total possible bar patrons)
850-379=471 room nights as possible Dream Big event attendees.

With the Yellowstone Series 1923 in Butte, STR data for tracking this objective, was not an option.

Another event Placer.ai was asked to extrapolate data was the Butte 100 Mountain Bike race. With the coordinates for the race start/finish near Homestake Lake were geo-fenced along with hotels in Butte. Unfortunately, the sample size was too small to obtain data.



Grant Details

Grant: 23-51-035 - FY23 Central Montana DMO Plan - FY23

Status: Underway
Program Area: DOC Office of Tourism
Grantee Organization: Central Montana
Program Officer: Barb Sanem
Awarded Amount: \$673,644.00

Narrative Evaluation

With FY23 being a year for Central Montana to bring on a new Executive Director in August of 2022, it was a year of transition and responsiveness for our organization. With this in mind, there was a lot to dig into and get up to speed on. While doing so, we also were able to either achieve or make solid progress towards our marketing goals.

With our marketing goals in mind, the theme was to increase our communications and messaging channel, while expanding upon our emerging markets.

With astrotourism being one of our emerging markets, we set an objective to create a landing page that promotes Trails to the Stars, which can be seen at <https://centralmontana.com/stargazing>. This page was launched in October of 2022 and received 11,272 pageviews and an average time on page of 01:48 for the remainder of the fiscal year.

Our second objective was to embrace agritourism as our other emerging market. This was accomplished by creating a landing page for that highlights agritourism within the Central Montana Region and can be seen at <https://centralmontana.com/agritourism>. This landing page went live in June of 2022 and received 3,672 page views and an average time on page of 01:50 for the remainder of the fiscal year.

In an effort to increase our communication channels through our organic social media, we set an objective to increase our Instagram followers by 20%. Unfortunately, CMT did not achieve this metric, but did achieve a 9% increase for a total of 15,296 Instagram followers at the end of the fiscal year. While a 20% increase in growth was an aggressive metric, we feel that we can still view a 9% growth as a strong accomplishment. It should be noted that traditionally, the Executive Director for Central Montana handled the organization's organic media. However, given the nature of how fast social media continues to evolve and change, we will be considering to allow our marketing agency on record to take over our organic social media so that we can create a stronger alignment between our organic and paid social media.

A second way we strove to increase our communication channels was to add an additional 10,000 email addresses to our email list for our monthly newsletter. With a growth of 5,700 subscribers, we accomplished just under 60% of our goal for the fiscal year. Given that we have missed this goal, we are taking steps to continually add subscribers to our email list by making it more inviting to subscribe to our newsletter on our website. Additionally, we will be adding an auto response email thanking new subscribers and directing them to other marketing assets such as our annual travel planner and our social media platforms that they can follow.

Our last objective was to raise more awareness of Central Montana as a Montana destination by achieving a 3% increase in overnight stays over FY22. We are happy to report that we saw a 9% increase in overnight stays for the fiscal year. We attribute a large amount of this success due to our paid media efforts meeting or exceeding all relative benchmark metrics. As a region, we were particularly excited to see that Central Montana surpassed \$3,000,000.00 in Lodging Tax Collections for the first time within a fiscal year.

Looking forward, Central Montana completed a strategic planning process in October of 2023, and is working hard to implement initial recommendations. This will give us a 5-year vision on how to best grow the region not only as a destination marketing organization, but also a destination development, management and stewardship organization as well. While there will be challenges ahead as we grow and evolve, we feel that we are ready to align ourselves in a way that is best for all aspects of tourism within the region.



Grant Details

Grant: 23-51-046 - FY23 Dillon CVB DMO Plan - FY23

Status: Underway
Program Area: DOC Office of Tourism
Grantee Organization: Beaverhead County Chamber of Commerce and Agriculture
Program Officer: Barb Sanem
Awarded Amount: \$63,500.00

Narrative Evaluation

At the Dillon DMO, Fiscal Year 23 was a smooth year, all of the previous issues with the administration of the office have been resolved and this marketing year seemed to have been administered in an orderly fashion. Here is a brief executive summary:

1) **Bed-Tax Collections:** Since Q1 2021, Dillon DMO has continued to see 9 consecutive quarters of bed-tax collection increases! While much of that was due to the bounce in visitors post COVID, and the solar farm construction, one could argue that the marketing plan has attributed to this continued success. Our evidence is that the visitor center has seen an increase in visitations during those 9 quarters. Over the course of 2021 to 2023, we have seen a 21% increase in visitors, and not experienced a decrease back to pre-2020 levels. The international visitor numbers are increasing as well with visitors from not just Canada, but also the UK, Australia, New Zealand, Russia, Germany, Denmark and Romania.

2) **Marketing Plan Audit:** For FY23, the marketing plan audit was conducted smoothly and accurately. We cannot stress enough how important for record-keeping it is to have a consistent, capable leader to manage the grant process. This Chamber must continue to strive to make this role sustainable so that this grant process may be conducted with efficiency and accuracy. While the Chamber has increased its memberships from 48 to the current list of 151 businesses, being a small town with limited business growth opportunities, growing Chamber memberships to a sustainable level continues to be a challenge.

3) **Website Administration:**

The marketing objective of maintaining and increasing the traffic to the website was successful in FY23! With the site sessions increasing by 16% and the most popular page being the events page, the visitDillonMT website has become a reliable source for information for seasonal travel and seasonal events planning for both visitors as well as residents. Keeping this website updated, maintaining the active business listings, and including the website URL in all the paid media ads, this marketing method has proven successful.

In 2022, the VisitDillon brochure was launched. Due to high-demand, a second printing was needed in 2023. This brochure is distributed at the baggage claim racks in regional airports (Butte, Bozeman, West Yellowstone, Helena, Missoula and Idaho Falls). The website URL was included on each page of the brochure, making it very easy for visitors to access the website regardless of where they were located.

Having a clear, easy to read website has become imperative for our DMO's success!

4) **Marketing Focus:** Since 2021, the marketing has shifted to a focus on the wintertime traveller and winter activities such as skiing, sledding, ice fishing and wildlife watching. Annually, Dillon sees as many sunny days as Phoenix Arizona, hence the new solar farms in our area, so encouraging folks from the region to stay for long weekends in the winter is a viable marketing focus. We continue to work to establish a Tourism Business Improvement District (TBID) in Dillon, in an effort to have the opportunity to bid on youth sports tournaments for the winter months as well as other marketing efforts. We have received signed petitions from two locally-owned properties and seek to receive signed petitions from some of our largest properties in Dillon, of which some are not Montana-owned. We will continue this effort to get these petitions signed soon.

The Paid-Media buys have focussed on being billboard, print magazines, and digital OTT marketing. The VisitDillon billboard was moved from just outside of Dillon to I-90 between Whitehall and Butte. This decision was made in an effort to capture some of the tourists travelling on I-90 between the two national parks. The print ads have been directed to Hemisphere's magazine, USA Today Winter Travel guide, and Bus Tours magazine. The opportunity to capture as much awareness as possible is the reasoning behind these ad selections. The digital marketing continues to be done through National Parks Trips, where they also provide an editorial for Dillon.

5) **Community-Wide Events:** While Dillon Montana promotes several regionally advertised events, such as Dillon Jaycee's Montana's Biggest Weekend-PRCA Rodeo over Labor Day weekend, the Dillon DMO is a sponsor of the event, but does not host the event, as the office has limited human resources. The Chamber hosts several business-related monthly events for Dillon, but none are really focused on drawing visitors.

So, in 2021, we launched a community-engagement program, in a way to draw people together using our Facebook page as the main channel of communication. We would hide the glass paperweights in businesses around the county and Dillon. On our Facebook page, residents and visitors would search for the paperweights and then bring them back to the Visitors Center to share what they had found. I would snap their photo and post on our Facebook page, which would continue to further the treasure hunt! The person's name would be entered into a drawing to win \$100 in Chamber Bucks from the Chamber. The finder gets to keep the beautifully, hand-crafted paperweight as their treasure! The winner of the Chamber Bucks is drawn and announced in mid-September each year.

The partnership with The University of Montana Western Glass Arts Program and The University of Montana Western Foundation to produce these wonderful glass paperweights has proven to be a viable community-outreach program. The residents of Beaverhead County and Dillon have come to anticipate "what the paperweights will be this year!" We have had visitors come to the visitor center with their

paperweight in hand, happy to participate! Eventhough we did not double the out-of-state finders, we did increase them by 37%, so perhaps our metric was a little ambitious. This is a wonderful community engagement activity that our town and area has grown to love. We look forward to sharing this program again in FY24.

We look forward to FY24 when we may continue to see an increase in our bed-tax collections, the visitors and commuinty-engagement! Thank you to the staff at the Dept. of Commerce and BrandMT for your continued support in helping the Dillon DMO achieve our goals!



Grant Details

Grant: 23-51-047 - FY23 Gardiner DMO PLAN - FY23

Status: Underway
Program Area: DOC Office of Tourism
Grantee Organization: Gardiner Chamber of Commerce
Program Officer: Barb Sanem
Awarded Amount: \$89,441.00

Narrative Evaluation

FY23 was a particularly hard year for the Gardiner CVB (GCVB) due to a historic flood event in Yellowstone National Park in mid June of 2022. The natural disaster led the actual lodging tax collections for the GCVB to be approximately 72% lower than what was projected at the start of FY23. This disaster required the GCVB to immediately shift funding priorities and either push some objectives to FY24 or utilize other funding sources (e.g. grants) to accomplish outlined objectives. Additionally, having a small staff was challenging throughout the fiscal year as our availability was further limited due to flood recovery and response.

However, there were many successes throughout FY23 that were funded through lodging tax collections. Especially the digital performance on joint ventures with both Brand MT and Yellowstone County as all partnerships were vital in recovering from flood impacts and garnished exposure on a national level. These Joint Ventures collectively had 9,316 clicks through to VisitGardinerMT.com and 4,231,755 impressions.

Also, with in first 24 hours of the flood event the GCVB was a crucial communication partner with the Yellowstone National Park Service and VisitGardinerMT.com was transformed into a one-stop-shop providing real time flood information to both visitors and residents. If it were not for lodging tax collections funding this critical information disbursement our small community and the visitors at the time of the event would have been much less informed on what recovery looked like and how one could travel to/from the area during the crisis.

The GCVB was able to implement an ITRR survey kit for the June 16 & 17, 2023 Gardiner Rodeo. The results from this survey provided us with data that will help in planning, marketing, and utilizing the area.

The GCVB was able to successfully communicate responsible recreation practices to visitors in the aftermath of the flood event via VisitGardinerMT.com, at the Visitor Information Center, social media channels, and posters through out Gardiner which was crucial in communicating how and where they could travel inside of Yellowstone National Park while access was limited. From July 2022 – November 2022 of FY23 VisitGardinerMT.com had approx. 63,000 users of which 89% were new, this showcases how essential VisitGardinerMT.com was throughout the crisis.



GLACIER COUNTRY TOURISM FY 2023 DMO COMPLETION REPORT

FY 2023 DESTINATION GOALS

Our overall goal was 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, leaving no trace, practicing wildland fire safety, by being kind, respectful and patient with one another and by recreating responsibly
3. Monitor and track characteristics and behaviors of visitors to Glacier Country
4. Sustain and increase 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. Develop and execute community relations and engagement program
7. Track values-based marketing performance

OUR TACTICS AND PROJECTS ARE RELATED TO OVERALL GOALS.

Destination Marketing: Crafting Compelling Narratives for Diverse Audiences

At Glacier Country Tourism, our destination marketing strategy is a multifaceted and dynamic approach tailored to resonate with diverse audiences while promoting Western Montana as an alluring vacation destination. Our marketing efforts are carefully designed to balance community capacity, visitor experiences and seasonal variations, ensuring that we attract visitors sustainably and beneficially for our communities.

Key Elements of Our Destination Marketing Strategy:

1. **Seasonal and Audience-Specific Messaging:** Our messaging strategy is adaptable, focusing on different themes based on the season and the capacity of the community/travel corridor. For instance, our 2023 winter campaign, "Winter Wisely," promoted Western Montana as a winter vacation destination and emphasized responsible recreation. Similarly, our in-state campaign, "We Live in a State of Awe," encouraged Montanans to explore locally, acknowledging their significant contribution to the economy and community well-being.
2. **Robust and Creative Messaging:** We employ a variety of creative tactics to inspire an emotional connection with potential visitors. This includes a mix of print and digital ads, participation in trade shows, and collaborations with tour operators, travel agents and meeting planners. Paid media efforts



resulted in 74 million impressions, .91% CTR, and \$7.82 CPM. Our messaging is designed to move potential visitors from inspiration to action.

3. **Comprehensive Digital Engagement:** Our digital engagement has been highly successful, with a total consumer response of 2,293,946, including webpage and digital travel guide inquiries. Our electronic response via the Internet was 2,232,468, and our consumer lead database grew by 10% over the previous year. These figures demonstrate the effectiveness of our digital marketing strategies.
4. **Social Media and Web Presence:** Our social media audience grew by 4% to 419,891, with a total impression delivery of 27,231,199. Unique webpage traffic was 1,985,322, highlighting the success of our online content in engaging visitors.
5. **Diverse Marketing Mix:** We offer multiple ways for potential visitors to learn about the region, catering to different preferences. This includes ordering travel guides from print ads, clicking banner ads that lead to landing pages on our website, and signing up for our consumer and B2B blogs and e-newsletters.
6. **Personalized Visitor Assistance:** We provide hands-on assistance for visitors planning their trips, including in-person support through our call center staffed with trained professionals. This service extends to various visitor needs, from leisure travel to meeting planning and destination weddings.
7. **Supporting Glacier National Park:** Our collaboration with Glacier National Park's pilot program call center is a notable achievement. We helped reduce wait times and call lengths by opening our call center to call transfers and assisting with vacation planning. As of the end of June, the call center had received 11,355 calls, more than double the total number received in 2022.

Impact and Future Directions:

Our destination marketing efforts have significantly contributed to Glacier Country Tourism's success, attracting diverse visitors and promoting sustainable tourism practices. The impressive growth in our digital engagement, social media presence, and consumer response rates are testaments to the effectiveness of our strategies. As we move forward, we will continue to innovate and adapt our marketing approaches to meet the evolving needs of our visitors and communities, ensuring that Glacier Country remains a premier and responsible tourism destination.

Film Promotion: Catalyzing Economic and Cultural Impact

Film promotion is a dynamic and influential component of Glacier Country Tourism's strategy, significantly contributing to our region's economic vitality and cultural allure. The production of feature films, television series, and commercials in Montana, particularly in the Glacier Country region, has generated substantial economic growth.

Key Highlights of Our Film Promotion Efforts:

1. **Economic Boost from Productions:** According to the Montana Film Office, from July 2020 to June 2022, there were 195 productions in Montana, with 60 in the Glacier Country region. This activity



resulted in \$77.5 million in total local direct spending, of which \$25.3 million was in Glacier Country. These figures underscore our area's significant economic impact from film and entertainment productions.

2. **Job Creation and Local Business Support:** The influx of film productions brings numerous jobs to the region and supports local businesses. This provides an immediate economic boost and contributes to long-term economic development and diversification.
3. **Film-Induced Tourism:** Films and other productions shot in our region attract visitors. The allure of visiting filming locations has a tangible impact on travel decisions, inspiring potential tourists to explore new destinations and experience the places they've seen on screen.
4. **Cultural Image and Branding:** Beyond economic benefits, film productions contribute to the cultural branding of Montana. They offer a unique opportunity to showcase the state's natural beauty and cultural heritage, enhancing its image on a global stage.
5. **Strategic Partnerships and Promotion:** Our efforts in film promotion involve strategic partnerships with filmmakers, local communities, and the Montana Film Office. We actively work to attract productions to our region and provide support to ensure their success, which in turn benefits our communities.

Impact and Future Focus:

The success of our film promotion efforts is evident in the significant economic contributions and the heightened interest in our region as a film destination. Looking forward, we aim to continue leveraging this sector to boost our economy, create jobs and enhance the cultural appeal of Glacier Country. Our ongoing commitment to supporting and promoting film production is a testament to its integral role in our overall success and the diverse appeal of our region.

Tourism Sales: Driving Economic Growth

Our tourism sales program is integral to Glacier Country Tourism's success, focusing on developing, promoting, managing and monitoring various sales and marketing programs. This program developed three new itineraries used to create interest throughout the region. The program led to a 16% increase in our total lead database. This growth is a clear indicator of the program's effectiveness and its role in driving economic growth.

Highlights of Our Sales Program:

1. **Expanding Networks:** Adding 525 new contacts to our database has significantly expanded our reach, enabling us to build stronger relationships with businesses and attractions.
2. **Increased Group Tour and Travel Numbers:** Our efforts have resulted in a 7% increase in group tour and travel, with 38 of our 75 communities and 155 businesses benefiting. This growth supports local economies and enhances the diversity of experiences offered to visitors.
3. **Growing Meeting and Convention Leads:** A 21% increase in meeting and convention leads, with 17 communities and 51 businesses benefiting. Our efforts aided significant economic impacts with six



in-region awarded RFPs, bringing an estimated economic impact of \$1.4 million). It underscores the importance of our sales program in attracting business events to the region.

4. **Strategic Trade Show Participation:** Consistent attendance at travel trade shows and strong relationships with industry representatives are critical to our success, allowing us to maintain and grow our presence in these important markets.
5. **Supporting Economic Recovery:** Our sales efforts are particularly crucial as markets rebuild post-pandemic, helping to drive economic recovery and sustain the tourism industry.

Impact and Future Focus:

The success of our sales program at Glacier Country Tourism is clearly reflected in the substantial growth of our lead database and the increased engagement in group tours, meetings, and conventions. With a 16% increase in new contacts and significant growth in group tour and travel, our efforts have expanded our reach and deepened our market penetration. Looking to the future, we aim to build upon this momentum, focusing on nurturing these newly formed relationships and exploring innovative strategies to enhance our sales program further. Our commitment is to continue adapting to market trends and evolving visitor needs, ensuring that we remain a preferred choice for diverse travel groups. By doing so, we will sustain and amplify our impact, driving economic growth and community development in Glacier Country.

Strategic Communications: Amplifying Our Impact

At Glacier Country Tourism, our communications program is a cornerstone of our success, playing a vital role in shaping our public image and amplifying our reach. In FY 2023, we achieved a remarkable earned media ad value of \$5.3 million, an 80% increase over the previous year (1,675,717,936 impressions). This success is a testament to our strategic approach to managing and monitoring our publicity and earned media projects.

Key Aspects of Our Communications Strategy:

1. **Diverse Media Engagement:** We actively engage with various media channels, including travel writers, TV show producers, documentary film crews, and digital influencers. This diverse approach ensures that our message reaches a broad audience, maximizing our impact.
2. **Collaborative Storytelling:** Our strategy involves collaborating with regional stakeholders to promote key messages and experiences. Whether hosting media trips or providing assets like editorial content, images, and videos, we ensure that our narrative is compelling and widespread.
3. **Responsive and Proactive Publicity:** Our communications team is adept at responding to media inquiries and is proactive in pitching stories. This balance keeps us at the forefront of travel media, continually keeping Glacier Country in the public eye positively.
4. **Measurable Impact:** The significant increase in our earned media ad value demonstrates the effectiveness of our communications efforts, directly contributing to our overall success by enhancing our visibility and reputation.

Impact and Future Focus:

The impact of our communications program at Glacier Country Tourism is profoundly rooted in promoting responsible recreation and sustainable practices. These core values have not only shaped our media reach



and ad value but have also significantly influenced the perception of our destination as a leader in destination stewardship. As we look to the future, our commitment is to intensify this focus, leveraging emerging media trends and technologies to further advocate for responsible and sustainable tourism. By continuously evolving our messaging to highlight the importance of preserving our natural and cultural resources, we aim to nurture a deeper, more responsible engagement with our audience. This approach ensures that our communications strategy adapts to the changing tourism landscape and actively contributes to the sustainability and long-term well-being of our communities and natural environments.

DESTINATION MANAGEMENT

Crisis Communication: Proactive and Responsive Strategies

In an era where crises are increasingly frequent, Glacier Country Tourism has prioritized developing and implementing a robust crisis communication strategy. Recognizing the critical importance of timely and accurate communication during crises, our approach is both proactive and adaptive, ensuring we are always prepared to respond effectively to any situation.

Key Elements of Our Crisis Communication Strategy:

1. **Clear and Concise Messaging:** Our strategy is centered on delivering clear, concise, and accurate messages to our visitors and stakeholders. This involves crafting appropriate responses and ensuring our messaging is consistent across all channels.
2. **Comprehensive Crisis Plan:** We maintain an updated crisis plan that is evaluated annually for relevance and effectiveness. This plan outlines specific protocols and actions that can be used for various potential crisis scenarios, ensuring we are always prepared to respond swiftly and appropriately.
3. **Direct Engagement with Media:** A crucial component of our strategy is direct engagement with media outlets. This allows us to control the narrative and ensure accurate information is disseminated to the public. We also provide communication tips and guidelines to our local businesses to help them navigate interactions with visitors and media, including social media posts and messaging.
4. **Adaptability and Responsiveness:** Our crisis communication is not static; it is designed to be flexible and responsive to the specifics of each situation. This year, for instance, we swiftly updated and implemented our plan in response to several wildland fires. Our strategy also addresses critical information needs, such as navigating Glacier National Park's vehicle reservation system and responding to environmental concerns like low water levels in lakes and streams.
5. **Community and Visitor Focus:** The commitment to safeguarding the visitor experience and supporting our local communities is at the heart of our crisis communication efforts. We aim to minimize crises' impact on visitors and residents by providing timely and accurate information.

Impact and Future Focus:

Our crisis communication strategy has proven to be indispensable in maintaining visitors' and local communities' trust and confidence. By being prepared and responsive, we have successfully navigated



numerous challenges, ensuring that our region remains a safe and attractive destination despite the inevitable crises. This readiness not only enhances our reputation as a responsible and reliable tourism organization but also contributes significantly to the overall resilience of our tourism sector.

DESTINATION STEWARDSHIP

Destination Stewardship: Implementing a Comprehensive Plan

Glacier Country Tourism has evolved from focusing on destination marketing to a broader approach encompassing destination management and stewardship in recent years. This shift represents a move from merely promoting our communities to actively engaging in and stewarding them, aiming for a more livable, lovable, and sustainable destination.

Our approach to destination stewardship goes beyond traditional economic metrics. We now measure success in terms of the overall well-being of our destination, considering the health of our natural resources, cultural heritage, and the quality of life for residents. This holistic view ensures that the quality of the visitor experience is balanced with the quality of life for our local communities.

Significant progress has been made in implementing our destination stewardship plan. Rather than isolating responsibility within a single program, our plan integrates all programs and involves every team member, including our board of directors and a newly formed Stewardship Committee. This collaborative approach aims to balance the impacts of tourism with the long-term health and vibrancy of Montana's communities.

As part of this initiative, we have focused on educating and involving our staff in the stewardship plan, ensuring that every aspect of our organization contributes to the sustainable development of our region. This includes working closely with local communities, businesses and other stakeholders to foster a shared understanding and commitment to our stewardship goals.

Our efforts in destination stewardship also involve telling our story more effectively. We recognize the growing awareness and varied perceptions of the tourism industry and the need to communicate our role, actions and measures of success more transparently. This involves qualitative and quantitative metrics, providing a clear and comprehensive view of our impact and achievements.

Community Outreach Program: Building Stronger Connections

Our community outreach program is integral to Glacier Country Tourism's mission, focusing on building and maintaining strong relationships with a broad audience to ensure our efforts are inclusive, accurate, and empowering.

Key Aspects of Our Community Outreach Program:

1. **Strategic Partnerships:** We develop and maintain relationships with economic development organizations, chambers of commerce, educational institutions and industry stakeholders.
2. **Project Management of Strategic Initiatives:** Our team is dedicated to implementing the recommendations prioritized and funded annually, ensuring the effectiveness of our initiatives.



3. **Direct Interactions and Meetings:** We engaged in physical and virtual meetings across eight counties, with over 300 direct interactions, emphasizing our dedication and the importance of an ongoing presence in our communities.

Impact and Future Focus: The success of our community outreach program is reflected in the strengthened relationships and increased social credibility within Montana. Our efforts have led to a deeper understanding of community needs and aspirations, enabling us to tailor our initiatives for measured impact. The program aims to improve the resident's quality of life and enhance the visitor experience, creating a harmonious balance between visitor and community interests. As we move forward, our focus will remain on deepening these connections and continuously adapting our strategies to meet the evolving needs of both our communities and visitors.

DESTINATION DEVELOPMENT

Destination Development: Enhancing Visitor Experience and Community Well-being

At Glacier Country Tourism, destination development is a key strategic initiative to enrich the visitor experience while bolstering the local economy. Our efforts are centered around collaborative projects, programs and funding activities that elevate the quality of a visitor's destination experience.

Key Highlights of Our Destination Development Efforts:

1. **Cooperative Grant Program:** We've expanded our cooperative grant program to support local projects that enhance the visitor experience and contribute to the region's economic vitality.
2. **VIC Staffing Grants and Event Promotion:** Our Visitor Information Center (VIC) staffing grants and community event promotion programs are crucial in providing visitors with valuable information and enhancing their overall experience.
3. **Education and Outreach Programs:** We focus on educating visitors and residents about the region, fostering a deeper understanding and appreciation of our unique cultural and natural resources.
4. **Support for Local Communities:** We work closely with communities to develop locally driven, authentic strategies that align with their unique goals and aspirations.

Impact and Future Focus: The impact of our destination development efforts is evident in the enhanced visitor experiences and increased community engagement. These initiatives will lead to more sustainable tourism practices, diversified local economies, and improved applicable infrastructure. Looking ahead, we will continue to innovate and collaborate with our communities to develop further and refine our destination development strategies. We aim to ensure that Glacier Country remains a vibrant, sustainable and appealing destination for all visitors.

METRICS

We measured the performance of messaging tactics and tracked year-over-year comparisons against FY 2022.

- ... Increase use of responsive websites by 10%.



- *Total trackable use of our various websites decreased by 5.7%. We attribute this decrease to our conversion from Universal Analytics to Google Analytics 4. This conversion occurred in August 2022, and all webpage statistics registered lower overall data for a period of 3 – 5 months.*
- ... Continue social media audience growth by 2%.
 - *Our overall social media audience is 419,891 – a 4.3% increase from previous year.*
- ... Increase consumer leads database by 2%.
 - *Our consumer lead database is 1,586,463 – a 9.7% increase from previous year.*
- ... Increase blog readership by 5%.
 - *Total trackable readership of our consumer and B2B blogs decreased by 43%. We attribute this decrease to our conversion from Universal Analytics to Google Analytics 4. This conversion occurred in August 2022, and all webpage statistics registered lower overall data for a period of 3 – 5 months.*
- ... Increase digital travel guide readership by 5%.
 - *Total trackable digital travel guide readership decreased by 2%. We attribute this decrease to our conversion from Universal Analytics to Google Analytics 4. This conversion occurred in August 2022, and all webpage statistics registered lower overall data for a period of 3 – 5 months.*
- ... Track overall paid media performance using KPIs of impressions delivered, engagement rate and cost per engagement.
 - *Paid media performance resulted in 74 million impressions, .91% CTR, and \$7.82 CPM.*
- ... Increase B2B leads by 4%.
 - *The combined B2B lead database is 3,878 – a 16% increase from previous year.*
- ... Track earned media ad value and readership/impressions delivered.
 - *The earned media ad value is \$5,320,509 and readership/impression delivery is 1,675,717,936 – an 80% increase from the previous year.*
- ... Track the conversion rate of people who visited our website and then physically visited Glacier Country.

There is no true and exact "conversion" data in the sense that x% of web visitors were also observed in-destination. We only see 5% of visitation... and 100% of web visitation, so it would never be an apples-to-apples comparison, but we are able to dive deep into the data to extrapolate useful data that aligns with much of the narrative we are measuring in our other objectives and metrics.



- *In-market visitors who go to glaciermt.com before visiting are more likely to be from Montana (25% of total for WebCon compared to 19% of total for overall visitors), Colorado (8% of WebCon compared to 4% of total visitors) and Utah (6% of WebCon compared to 4% of total visitors).*
- *This is largely because over 60% of WebCon visitors get to the site through an organic channel at some point ahead of their in-market visit.*
- *WebCon visitors are more likely observed in counties such as Mineral, Glacier, Lake and Ravalli than our overall Glacier Country visitor. Based on the data it appears our web visitor spreads out more throughout the destination versus the heavy clustering in Flathead and Missoula counties (one thing to note- Flathead and Missoula are the top two visited counties for both groups)*
- *Web visitors are five times more likely to be observed in Glacier National Park, two times more likely to be observed at an accommodation, and less likely to be observed in and around the I-90 corridor - (50% less likely to be observed in Missoula (city), 50% less likely to be observed in St Regis (city).*
- *35% of total visitors are observed on a blog page at some point during their website journey.*

We continued our recreate responsibly messaging to minimize the negative impact of visitation on our communities.

- Track overall media performance using KPIs of impressions delivered, engagement rate and cost per engagement.
 - *Paid media performance resulted in 74 million impressions, .91% CTR, and \$7.82 CPM. All messaging – paid or earned – includes recreate responsibly messaging.*
- Conduct a biannual survey of residents of Glacier Country to track if we are building awareness of the message.
 - *This survey will be conducted during the FY 2024 year.*

We will track the activities of this program to ensure we are engaging in meaningful ways across all our counties and communities and provide data, research and or funding (when appropriate) to assist them.

- Hire a Director of Community Engagement
 - *This position was hired in January 2023.*
- Beginning in FY 2023, we will use Zartico to track and visually display various data sets that Glacier Country Tourism and our communities have identified as valuable and critical. The data from FY 2023 will provide baseline data we can compare against moving forward.
 - *Track workforce trends by monitoring jobs available, unemployment rate and average income.*
 - *Montana had 34,000 job openings in July 2023, compared to 35,000 openings in June. US Bureau of Labor Statistics*



- *The unemployment rate was 2.5% in July 2023 compared to 2.6% in 2022. US Bureau of Labor Statistics*
- *Montana's average annual income in 2022 was \$54,525 compared to \$51,319 in 2021. Montana Department of Labor and Statistics*
- *Track affordable housing by monitoring median household income compared to median residential home price and median rent by county.*

Source: Median Household Income & Median Rent - US Census 2021. Median Home Price, Monthly Mortgage Payment- National Association of Realtors Q1 2023.

- *Flathead County: Household Income: \$63,582, Median Home Price: \$631,323; Median Rent: \$1,613*
- *Glacier County: Household Income: \$39,441, Median Home Price: \$184,171; Median Rent: \$534*
- *Lake County: Household Income: \$53,154, Median Home Price: \$410,800; Median Rent: \$768*
- *Lincoln County: Household Income: \$41,922, Median Home Price: \$301,604; Median Rent: \$719*
- *Mineral County: Household Income: \$50,750, Median Home Price: \$301,036; Median Rent: \$687*
- *Missoula County: Household Income: \$61,423, Median Home Price: \$571,297; Median Rent: \$972*
- *Ravalli County: Household Income: \$59,640, Median Home Price: \$449,282; Median Rent: \$866*
- *Sanders County: Household Income: \$46,848, Median Home Price: \$374,165; Median Rent: \$672*
- *Track the 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 (ADR) by region and county.*

Note: Data tracking set will be for nights available versus units available. Nights Available is also known as Room Supply. The total nights available to book for guests include existing guest reservations and open nights (Open Nights). This is calculated as the total nights in the period minus owner nights and hold nights (Unavailable Nights).

- *According to Keydata, there were 2.1 million nights available in the **Glacier Country region** at year-end FY 2023 – up 16% compared to the previous year. ADR was \$300 (up 5%), and occupancy was 31.4 (down 5%).*
 - *There were 1.3 million nights available in **Flathead County** at year-end FY 2023 – up 16% compared to the previous year. ADR was \$352 (up 5%), and occupancy was 29.9 (down 6%).*
 - *There were 42.1 thousand nights available in **Glacier County** at year-end FY 2023 – up 19% compared to the previous year. ADR was \$249 (up 5%), and occupancy was 29.4 (down 3%).*
 - *There were 159.3 thousand nights available in **Lake County** at year-end FY 2023 – up 17% compared to the previous year. ADR was \$297 (up 7%), and occupancy was 27.6 (down 4%).*
 - *There were 72.9 thousand nights available in **Lincoln County** at year-end FY 2023 – up 13% compared to the previous year. ADR was \$208 (up 2%), and occupancy was 32.3 (up 8%).*
 - *There were 25.7 thousand nights available in **Mineral County** at year-end FY 2023 – up 19% compared to the previous year. ADR was \$302 (up 25%), and occupancy was 38% (down 6%).*



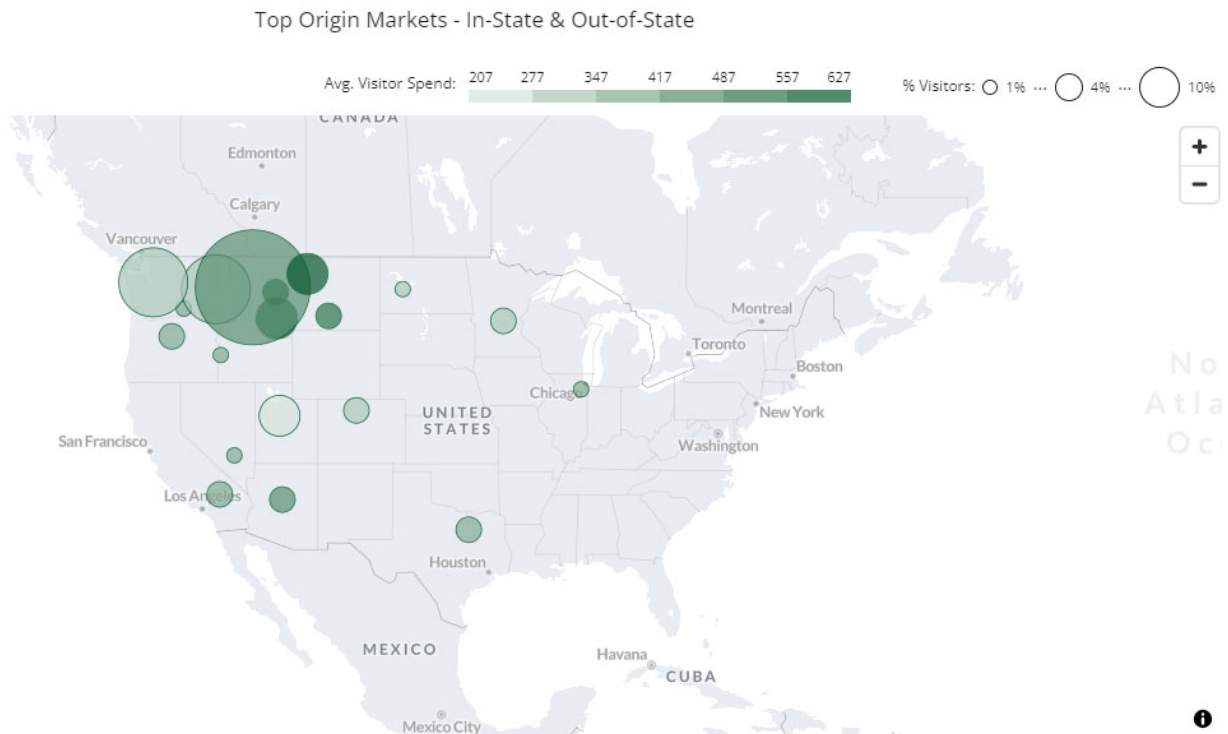
- *There were 324.8 thousand nights available in **Missoula County** at year-end FY 2023 – up 14% compared to the previous year. ADR was \$193 (up 8%), and occupancy was 37.6 (no change).*
- *There were 143.2 thousand nights available in **Ravalli County** at year-end FY 2023 – up 20% compared to the previous year. ADR was \$235 (up 9%), and occupancy was 34.6 (down 6%).*
- *There were 48.9 thousand nights available in **Sanders County** at year-end FY 2023 – up 16% compared to the previous year. ADR was \$209 (up 1%), and occupancy was 32.1 (down 6%).*
- Track resident sentiment toward tourism using resident sentiment survey data from ITRR and Glacier Country Tourism.
 - *According to the Institute for Tourism and Recreation Research’s Resident Attitudes Toward Tourism Survey (Q4 2022), residents who reside in Glacier Country responded:*
 - *The overall benefits of tourism outweigh the negative impacts. 71% answered YES and 19% answered NO*
 - *If tourism increases in Montana, the overall quality of life for Montana residents will improve. 35% answered YES and 37% answered NO*
 - *In recent years, the state is becoming overcrowded because of more tourists. 37.5% answered YES and 51.7% answered NO*
 - *In recent years, my community is becoming overcrowded. 62.4% answered YES and 31.8% answered NO*
- Track visitation trends using data from ITRR and Zartico beginning 2021. Data will include top spending markets, visitor spending, visitor dispersion, and percent of in-state/out-of-state/resident travel compared to the total device count.
 - *73.2% of visitors are nonresident compared to 26.8% resident*
 - *Top Spending Markets:*

Visitor Market Area	% Visitors	% Visitor Spend	Avg. Visitor Spend
Missoula MT	9.9%	5.4%	\$350
Spokane WA	9.4%	4.9%	\$264
Seattle-Tacoma WA	6.1%	4.1%	\$246
Butte-Bozeman MT	5.3%	8.4%	\$501
Great Falls MT	4.3%	12.1%	\$627
Salt Lake City UT	4.2%	1.4%	\$207
Helena MT	3.4%	2.9%	\$511
Denver CO	3.2%	2.3%	\$260
Phoenix AZ	3.0%	2.3%	\$348
Portland OR	2.6%	1.6%	\$285

In our recent analysis of visitor spending patterns in the Glacier Country region, we found a significant trend aligning with the preferences expressed by local residents during our destination stewardship



planning town hall meetings two years ago. Most in-region visitor spending is attributed to individuals residing within a 600-mile radius of Glacier Country. This data is particularly noteworthy as it reflects the local community's desire to attract more visitors from Montana and its immediate neighboring areas, as voiced in our earlier meetings. This trend supports the community's vision and highlights the economic impact of regional tourism, underscoring the importance of focusing marketing efforts on this demographic to sustain and grow the local tourism economy.



- *Visitor Dispersion:*
 - *The following represents share of visitor movement by county:*
 - *Flathead County: 31.8%*
 - *Missoula County: 28.9%*
 - *Glacier County: 18.3%*
 - *Ravalli County: 8%*
 - *Lincoln County: 6%*
 - *Lake County: 5.5%*
 - *Sanders County: 1.4%*
 - *68.5% of trips are overnight compared to 31.8% visiting for the day.*
 - *Glacier Country Region: Average visitor spending was \$309 – down 6% from previous year; 80% of visitors are nonresident*
 - *Flathead County: Average visitor spending was \$309 – down 6% from previous year; 80% of visitors are nonresident*
 - *Glacier County: Average visitor spending was \$146 - up 16% from previous year*



- *Lake County: Average visitor spending was \$206 - up 9% from previous year*
- *Lincoln County: Average visitor spending was \$183 - down 1% from previous year*
- *Missoula County: Average visitor spending was \$282 - up 6% from previous year*
- *Mineral County: Average visitor spending was \$80 - up 1% from previous year*
- *Ravalli County: Average visitor spending was \$235 - up 7% from previous year*
- *Sanders County: Average visitor spending was \$277 - up 20% from previous year*
- Track and report 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.
 - *FY 2023 Collections for the Montana Lodging Facility Sales and Use Tax: \$58,933,586*
- Track the visitor-to-resident ratio in the region and by county.

Note: "Visitor" is defined as anyone not from the eight Glacier Country counties. i.e. .5% equals for every one resident; there is .5 visitors)

- *Flathead County: .41 – down 18% from previous year*
- *Glacier County: .86 – down 15% from previous year*
- *Lake County: .34 – up 10% from previous year*
- *Lincoln County: .36 – up 20% from previous year*
- *Missoula County: .32 – down 10% from previous year*
- *Mineral County: 5.75 – down 26% from previous year (Note: the number heavily reflects pass through traffic from I-90.)*
- *Ravalli County: .35 – up 6% from previous year*
- *Sanders County: .48 – up 20% from previous year*



Grant Details

Grant: 23-51-049 - FY23 Great Falls DMO Plan - FY23

Status: Underway
Program Area: DOC Office of Tourism
Grantee Organization: Great Falls CVB
Program Officer: Barb Sanem
Awarded Amount: \$258,035.04

Narrative Evaluation

Great Falls Montana Tourism is still working towards a leveling out since COVID-19. In 2022, Great Falls was host to over 1,367,655 overnight visitors, which is an 8% decrease over 2021. Great Falls saw a 12% increase in room demand in 2022 over 2021. In 2021, Great Falls saw great overnight visitation numbers and we attributed that to pent-up demand after COVID for leisure travel. In 2022 our room demand was high with temporary workers in the healthcare industry and an alternative fuels project at our refinery. These workers were not likely captured in the overnight visitor data collected by ITRR. The calendar year data analysis is helpful as the quarterly data from ITRR is used with more caution because of the sample sizes. FY23 room demand was 3% higher than FY22 room demand and set the record for the highest room demand in the history of Great Falls.

Great Falls Montana Tourism's paid media strategies generated 25 million impressions and a reach of over 2 million in FY23. We spent \$181,178.76 marketing events, outdoor recreation, arts, and culture with our double exposure creative. We grew our click-through rate from 0.51% to 0.85%, reduced our cost per impression over the previous year, and reduced our cost per click by 43% from \$1.49 to \$0.85.

Great Falls Montana Tourism's owned media efforts continued to grow through FY23. Instagram followers grew by 17% to 6,800+. YouTube Channel grew 103% last year to 360 subscribers. Facebook grew 18% last year to 15,000+ followers. In FY23, our organic social media posts generated 4,991,349 impressions and an engagement of 187,891. Our podcast, We're No Dam Experts, has over 28,500 lifetime downloads.

In FY23, Great Falls Montana Tourism provided 3,075 people with visitor services. In the months of July – September, at the direction of the Board of Directors, we operated 7 days a week. At the end of FY23, when the summer season would pick up again, the organization went back to 5 days a week of operation. Between 80-93% of Great Falls' walk-in guests came between May and September. Since 2011, the demand for in-market, in-person visitor information has had year-over-year declines. For FY23, walk-in guests accounted for 0.22% of our overnight visitation and on average 10% of the total budget. On average, 20% of the traffic is Great Falls residents, 25% are camping, 35% are driving through, and 20% are spending a night in Great Falls. Great Falls Montana Tourism uses volunteers to assist with walk-in guests and hires a seasonal part-time Guest Services Manager. Advertising starts in February to attract both volunteers and the paid staff. We were unsuccessful in getting new volunteers, however, retained two from the previous year and were unable to hire a Guest Services Manager until August.

Great Falls Montana Tourism embarked on a desperately needed project to develop a Comprehensive Strategic Tourism Master Plan for Great Falls, Montana. The effort kicked off in May and will be completed in February 2024. The desire is for this plan to provide needed strategies to grow tourism, post-COVID, consistently, sustainably, and effectively.



Grant Details

Grant: 23-51-050 - FY23 Helena DMO Plan - FY23

Status: Underway
Program Area: DOC Office of Tourism
Grantee Organization: Helena Area Chamber of Commerce CVB
Program Officer: Barb Sanem
Awarded Amount: \$171,056.00

Narrative Evaluation

Our goals this year were to:

1) Raise awareness of Helena's recreational, cultural and historical attractions and activities and increase visitation in the warm and shoulder seasons. 2) Continue to build upon marketing opportunities with other tourism partners including the Helena TBID, Helena Regional Airport, Southwest Montana Tourism and Montana Office of Tourism and Development 3) Increase awareness of Helena as a destination and encourage visitors to Glacier and Yellowstone National Parks to take advantage of Helena as a travel destination hub due to its convenient geographical location and 4) Develop a strategic and comprehensive digital campaign that will reach our desired audiences and drive them to our website and social channels where we can track usage and engagement.

I was incredibly proud of the work the Helena CVB did this year to meet these goals. Helena has struggled mightily to find a place amongst our neighbors as a destination. However, I felt that by the work we did to develop a strategic campaign and the efforts that were put into attracting the right audience, we were able to make some strides and narrow the gap as a tourist destination. In conjunction with our partners at the Helena TBID, we were able to capitalize on the brand strategy that was developed through our community partners. This allowed for a more consistent communication across all of our partners while also presenting Helena in a much more authentic way to our potential visitors.

This year in developing our digital campaigns, we focused on our demographics, particularly adults in the 25-54 age range, who were interested in Montana travel, family and leisure vacations and outdoor recreation travel. Post-pandemic, Helena has seen an increase in travelers who were not only interested in traveling to Montana, but traveling to destinations that they would consider as places to live. With less immediate growth than our neighbors in Bozeman and Missoula, this made Helena a sought after destination for leisure and relocation. In looking at our strategy, we also considered our regional drive markets as we are still limited on direct flights and included both Alberta and Saskatchewan this year after getting feedback from our hotel partners.

The addition of a fall campaign was something I was very pleased with this year. Our hotel partners have been very clear that while the warm season continues to be strong, we still struggle during the shoulder seasons. Our fall campaign was very successful. We focused on that same age range through a google search and adwords campaign, a programmatic digital display campaign and an email campaign where we teamed with Distinctly Montana. The Fall Should campaign had the second highest click through rate of the three (fall, spring and warm season) campaigns at 11.39%. This resulted in 106 conversions with 50 of those being clicks to view the vacation guide. The campaign ran from September 19-October 19, 2022 and we did see an increase of 8.8 points in hotel occupancy per the November 2022 STR Report.

Our spring and warm season campaigns also performed well. This year, streaming audio was included in the spring campaign. It performed very well with an audio completion rate over four percent above benchmark. This level of engagement suggests we should include this tactic throughout FY24. It was exciting to add a new opportunity through Spotify to market Helena. A highlight from the warm season campaign was the Family Adventure Native Content article targeting Wyoming, North Dakota, Idaho, Colorado and Utah. It had a very impressive click-through-rate of .32% which was our most responsive of the two articles and sets of display ads. Historically, we have had good luck with native content and are planning on using it again in our FY24 campaign.

As always, we rely on our partnership with the Yellowstone Journal to generate leads. This placement continues to deliver leads to the Helena CVB for both travel planners and use in future email outreach efforts. This year, in partnership with the Helena TBID, we reworked our travel planner. While the CVB aided in the printing of the travel planner, we also created a flipbook in digital form. Normally, we get many requests for hard copies of our travel planner but because the flipbook was so attractive, we saw the trend switch from hard copies to requests for digital copies. This change, partially because of the change in demographic in our traveler, resulted in us saving more money in postage fees than we have in the past.

Overall, I was very pleased with this year's campaign. I believe that we were able to try some new marketing techniques, streaming in particular, that helped show growth in our lodging collections and gave us great footing to move forward. This year, we increased our lodging collections from \$123,000 in FY22 to \$171,056 in FY23. I think that our focus on raising awareness of Helena as a recreational and

cultural hub with proximity to the parks has literally paid off, and I am proud of the work we have done to speak with a voice authentic to Helena.

DISCOVER KALISPELL



FY23 DMO PLAN - NARRATIVE EVALUATION

Discover Kalispell facilitated the FY23 DMO plan through comprehensive and integrated Destination Marketing initiatives (paid, earned and owned media), and Destination Stewardship-Management and Development initiatives for effective visitor communications, support of projects important to the community, and stewardship of natural resources. Highlights include:

Destination Marketing

Employed a multi-touch approach to emphasize winter travel, unique Kalispell experiences, and the promotion of Go-With-A-Guide to assure responsible recreation. Introduced tools to promote local businesses and to offer an enriched travel experience.

Paid media (SEM, display and paid social) included seasonal evergreen and niche campaigns. Overall KPI's: 185,064 clicks to website, CTR between 0.14% and 2.96% depending on channel and campaign creative, and CPC's below \$3.00, a strong ROI.

Print advertising and dedicated eblast campaign outlets were selected based on the DMO plan target markets and outlets that offered a value-add component. Examples include Smart Meetings, LA Magazine, RoadRunner Magazine, Dreamscapes, Northwest Travel & Life Magazine. A total distribution of over 650,000.

Niche campaigns such as the Town & Trails Pass - a destination experience pass where users checked-in 904 times to local businesses, trails and activities, a Gas Card fall hotel promotion directed to drive markets, and ads on Montana TV network highlighting winter activities in Kalispell (in partnership with local activity providers).

Earned media initiatives included hosted press trips highlighting winter activities, museums, culinary assets, and Glacier Park International Airport to promote visitations and ease of access to Kalispell. Articles generated a total reach of over 45 million.

Photo and video assets were secured showcasing winter: downtown streetscapes, culinary, Blacktail Mountain Ski Area, GNP, local winter events, and a full-length destination video.

Group sales initiatives generated increased recognition for Kalispell as a group event market demonstrated by a 49% increase in tour group bookings and 28% increase in group event inquiries. Funds were used to secure a 625-room night conference in September and sponsor an association meeting.



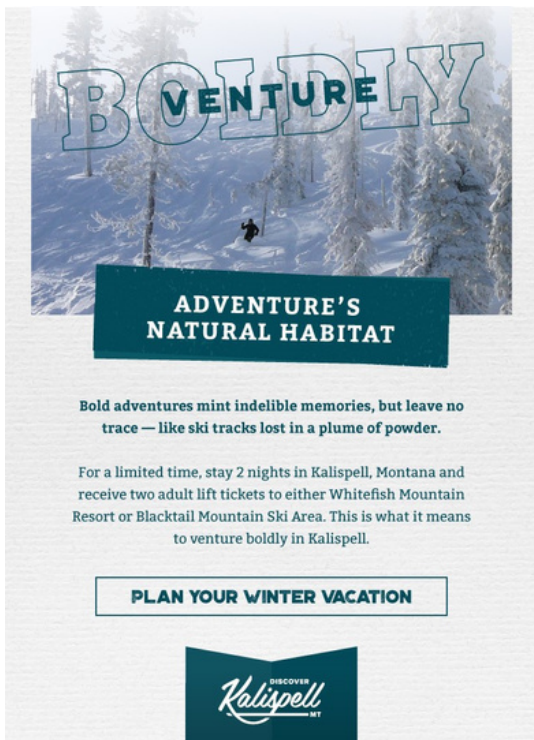


Destination Stewardship/Management

Visitor management and community stewardship initiatives included Visitor Information Center services, annual Kalispell Adventure Guide (travel guide), table-top display distributed to high traffic visitor locations, initiatives to support natural resource stewardship such as promoting voluntourism opportunities, hosted guest services training workshops, and collateral to promote Kalispell's three museums.

Destination Development

Event and Community/Visitor Asset Development grants awarded to a downtown winter event, contribution to Main Street holiday decorations, American Eventing Championships, and support of Pathfinders – a national association that hosted a youth conference in Kalispell and completed a community cleanup project at a city park.



FY23 Budget Not Used

Quarterly revenue was down for the Jul-Sep and Oct-Dec quarters which promoted our organization to slow spending. Jan-Mar was up 3% but Apr-Jun had a decrease of 3%. Consequently, several projects and planned spending levels were not achieved.





Grant Details

Grant: 23-51-052 - FY23 Livingston DMO Marketing Plan - FY23

Status: Underway
Program Area: DOC Office of Tourism
Grantee Organization: Livingston Business Improvement District
Program Officer: Barb Sanem
Awarded Amount: \$49,275.00

Narrative Evaluation

1) Destination Marketing Objective: Increase year-over-year lodging tax collections and visitor spending in the cooler months for the Livingston DMO.

Year over year spending in Park County increased and length of stay for nonresident visitors nearly doubled. However, year over year winter visitation via the Northern Entrance to Yellowstone Park decreased and we did not meet our Destination Marketing goal to increase year-over-year lodging tax collections by 5% during Q4 2022 and Q1 2023 vs. Q4 2021 and Q1. This is attributed to widespread assumptions by visitors following the Yellowstone Floods that Yellowstone Park and our region were not accessible or were damaged beyond enjoyment even after the Northern Entrance reopened. This assumption was held not just by national and international travelers given the focus on images of housing falling into the river, but also by residents as nearby as Bozeman 30 miles away. To address these assumptions, we developed a marketing campaign, "Pick Your Path to Paradise" and "Pick Your Path to Winter Paradise" to educate our target audiences about all of the attractions in our region located just outside of the park and also announce when the Northern Entrance was re-opened and focus on winter visitation. We used a Flood Recovery Grant from Commerce for this Flood Recovery informational and inspirational campaign.

2) Destination Management Objective: Create awareness of our "preserve and protect Livingston" (exact name TBD) campaign among visitors and locals and increase year-over-year website traffic and social engagement.

Our inability to increase year-over-year traffic to Explore Livingston's website by 5% was likely a result of people not planning visits due to the Yellowstone Floods. (This theory is supported by current fiscal year data that shows our website traffic is up 334% year over year to date). In FY23 we added a number of new website assets including an interactive map, Field Guide and blogs, which also go to our LinkTree live seasonal links on Instagram. Our FY23 social media engagement was up significantly due to Flood awareness and recovery campaigns.

We began working on a Destination Management campaign, with a first draft as "For the Love of Livingston," in the first part of the fiscal year but community engagement and implementation were put on hold after the devastating Yellowstone floods of June 2022 because we do not have the personnel to implement multiple simultaneous campaigns. Funds in the FY23 budget for this Destination Management campaign have been rolled over to implement in FY24. This Destination Management plan pivoted to focus on Yellowstone Flood information and visitation recovery, with a Pick Your Path to Paradise (P2P) "Play Today, Invest in Tomorrow" campaign. This campaign was in partnership with Gardiner to promote area visitation prior to the Northern Entrance of Yellowstone being open. The campaign included a shared Livingston, Paradise Valley, Gardiner website <https://www.path2paradisemt.com/> with itineraries, interactive map, and informational links. 500 posters were distributed throughout the area. Through radio ads and digital media, we targeted the statewide drive market with Montanans eager to help us recover from the Yellowstone Floods. Our Flood Recovery/Open for Business social media posts (172 Facebook posts, 161 Instagram, 214 Stories) on our social media channels for organic unpaid content included amplified reach with the John Mayer flood recovery concert series. Our paid Path to Paradise social media campaign with 21 ad sets in a series of nine themes had a Cost per Click (CPC) of .55, Click Through Rate (CTR) of 1.19. P2P ads generated a total of 195,804 impressions, 58,484 reach, and garnered 1,740 clicks.

Livingston hotel occupancy was predicted to be down about 50% in the high season but ended up being down only 25%, although this occupancy reduction did impact our budget. We continued our campaign through the FY23 Winter with a Pick Your Path to Winter Paradise when Yellowstone Park's northern entrance reopened but visitation remained lower than previous years. The billboards, banners, and sign updates for this Objective are underway in the current fiscal year as "Livingston Like a Local."

3) Destination Stewardship: Obtain diverse participation and input to develop key takeaways for the sustainable tourism strategic plan.

We distributed an initial pre-flood survey that garnered responses from 245 people, exceeding our goal of engagement from 100 community members. Then the priority for Destination Stewardship pivoted to Yellowstone Flood information and post-flood economic and visitor recovery, which included dozens of emergency response, recovery, and sustainability strategy meetings with regional stakeholders and peers

around the state. The partnership meetings have yielded wider data sets than we could have gathered on our own and will be accessed for strategic planning. The next stage of engagement and implementation for Destination Stewardship strategies was delayed until the current fiscal year.

Stakeholder survey summary:

- 245 people started the survey, 88% are from Livingston
- 1/3 of the respondents are involved in the hospitality/tourism industry
- Majority agree that the overall benefits of tourism outweigh the negative impacts
- They also agree that area is becoming overcrowded due to summer visitors
- They appreciate the economic and quality of life benefits of tourism
- They are also concerned about impacts to traffic, affordable housing and more
- Respondents want visitors to be respectful; grateful; responsible and smart; low impact; and supportive
- They have a high level of interest in a sustainable tourism strategic management initiative and are willing to get involved

Key takeaways:

- Majority of respondents agree that:
 - Overall benefits of tourism outweigh the negative impacts
 - The area is becoming overcrowded because of more tourists
 - The area is becoming overcrowded because of more summer visitors
- Respondents were nearly evenly split as to whether or not the area's overall quality of life will improve if tourism increases
- Attitudes about tourism differ from those from Yellowstone Country who completed ITRR's study; Livingston area respondents were:
 - Less likely to agree that the overall benefits of tourism outweigh the negative impacts
 - More likely to agree that the area is becoming overcrowded because of more tourists

Several key themes emerged from the open-ended responses to the question: What would you like to communicate to those visiting the Livingston area?

- Respondents want visitors to be:
 - Respectful (101): "Treat the place with the respect equal to the awe that brought you here." "Be patient. Be kind, Be a good neighbor."
 - Grateful (58): "Don't be in a hurry. Enjoy what we have to offer."
 - Responsible and Smart (41): "Just don't be an idiot and you'll be most welcome here." "Recreate responsibly."
 - Low Impact (26): "Love our little town and leave it better than you found it."
 - Supportive (22): "Buy from and support locally owned businesses." "Protect what you come to see."
 - Want Visitors not New Residents (14): "Visit but don't stay."

Interest in Sustainability:

- 150 people (64%) are interested in seeing sustainable tourism management initiatives used to help plan and manage for continued visitation
 - 61 people (26%) said "maybe"
- 171 people (82%) are interested in being involved in some capacity
- 36 people (51%) said their business would be willing to share information with tourists and visitors
- Several topics emerged from the open-ended responses to the question: Anything else you'd like to share related to tourism in Livingston?
 - Appreciation for efforts (25)
 - Concerns about affordable housing and short-term rentals (10)
 - Want to see tourism income used to relieve community impacts (7)
 - Need for the right kind of/respectful visitors (5)
 - Need for diversified economy (3)

This survey was completed just before the Yellowstone Floods. A post flood survey of resident sentiments about tourism and community values sent to a similar demographic was completed by the Park County Community Foundation with their We Will initiative, here's the 2023 report. We were surprised that the results varied less than a few percentage points, despite our tourism economy being so hard hit by the floods. We look forward to coordinating all these greater data sets for community engagement and Destination Stewardship planning in an era of increasingly frequent annual crises that impact our destination.

Survey Link [here](#).

We thank the Department of Commerce Brand MT and Tourism Advisory Council for their support, additional funding, leadership and vision during three exceptionally challenging and unpredictable years. Having streamlined and simpler reporting and the opportunity to adapt to changing circumstances, gives us greater capacity to focus on implementing our work while being more nimble, strategic and responsive to our community's unique needs, although similar to many Montana communities' challenges.



Grant Details

Grant: 23-51-053 - Miles City DMO Marketing Plan FY2023 - FY23

Status: Underway
Program Area: DOC Office of Tourism
Grantee Organization: Miles City Area Chamber of Commerce
Program Officer: Barb Sanem
Awarded Amount: \$57,533.00

Narrative Evaluation

Fall Objectives:

Our 7% increase can be attributed to better access block management availability and a bigger deer population than last year. We also saw an unexpectedly high late travel season from the the summer travel we have seen in the past years. We will continue to market hunting in the fall as well as looking at late National Park visitation trends.

Spring Objectives: Weather once again played in our favor with all the Mon-Dak baseball and softball teams playing all their games in Miles City. This mean't we had all teams staying in Miles City to play all spring. Bucking Horse was very similar in size from the year before. With additional seating and more live horse racing dates this will still prove to be a marketing piece we will continue to do .

Summer Objectives:

The strength of summer canbe attributed to several issues. The perception of overcrowding in the National Parks, more marketing being done for Eastern Montana, and what we saw as stay-cations moved the needle. We will continue to market our incredible offerings hoping to repeat these number or increase them next year.

Winter Objectives:

While any increase is good we fell short due to less Hockey Tournaments and a bit nicer weather situation than last year. The TBID is committed to sponsoring more tournaments next hockey season so we will continue to market hockey making marketing even a stronger push to build our share with their help.



Grant Details

Grant: 23-51-054 - FY 2022-2023 Destination Missoula Marketing Plan - FY23

Status: Underway
Program Area: DOC Office of Tourism
Grantee Organization: Missoula Convention & Visitors Bureau
Program Officer: Barb Sanem
Awarded Amount: \$702,549.00

Narrative Evaluation

Destination Missoula Narrative for FY 22-23 Marketing Plan

2022-23 Objectives and Metrics Measures

Marketing & Development

Promote our destination with an emphasis on increasing sustainable year-round visitation.

Destination Missoula promoted responsible recreation messaging in a majority of our paid media campaigns throughout the year. This includes print, digital and social media. We use messaging throughout our major publication – the Missoula Visitor Guide and on our website – www.destinationmissoula.org. We had print ads in such publications as Sunset, Backpacker, and Midwest Living magazines that promoted responsible recreation, just a name a few. We also created a video in partnership with Fish Wildlife and Parks that taught folks how to recreate responsibly on the river.

Although we had hoped the result would be to increase our visitation by 1% during our shoulder season and to maintain our current visitation numbers during the warm season, we basically maintained both seasons at previous year-levels.

Shoulder Season – (October-April)

2021-2022: 50.7%

2022-2023: 50.4%

Warm Season – (May-September)

2021-2022: 77.7% (There is a discrepancy in the number used in our DMO Plan (79.5%) and the actual occupancy number. This can happen because when we are writing the DMO Plans we don't have the full year occupancy numbers from STR yet, so they are taken from a calendar year perspective. When the full numbers are in this number will adjust to the true occupancy numbers for our fiscal year – July through June.)

2022-2023: 77.1%

We feel that we were still successful, as we started to see a shift in visitation in Montana and other western mountain states as other domestic destinations and international travel opened back up, offering travel deals to win back visitors. We knew that there would be a period of adjustment from the Covid travel bubble that we saw.

Management and Stewardship

Create a more responsible, sustainable tourism destination and organization.

1. Create a Destination Stewardship Plan. We developed an RFP that was released nationally on September 23, 2022. The Evaluation Committee reviewed the responses, interviews were held, and the contract was awarded February 1, 2023, to MMGY NextFactor and Better Destinations.
2. Focus on Community Alignment. From February through June 30, 2023, we formed a Destination Stewardship steering committee, comprised of 28 leaders representing city, county and tribal governments, economic development, arts, culinary, accommodations, recreation, conservation, land managers, businesses, and nonprofits from across the community. The consultants met with the Steering Committee in April and held one-on-one interviews with our Mayor, 2 of our 3 County Commissioners, and the Director of the Missoula Redevelopment Agency. The consultants returned in May, and we held more one-on-one interviews and the first half of our focus groups and town halls. We held 4 focus groups with representatives from outdoor recreation and conservation, our Front Country land managers, hotel and accommodations, attractions, festivals and events (sporting, recreational). The consultants held one-on-one interviews with the U of M

President, economic development director, representatives from our hospitals, and from Logjam Presents – a major music production company in Missoula. We also held two town halls that were open to the public.

3. Educate staff through professional development opportunities. All full-time staff participated in at least two professional development opportunities. This includes educational events such as: Destinations International Advocacy Summit, Destinations International CEO Summit, Future of Tourism Podcast, Missoula Frontline Staff Training, International Roundup, Sports & Events Tourism Association, Accessible Tourism & Travel Webinar and Equity Diversity and Inclusion workshop, just to name a few.

Destination Management

Gain a deeper understanding of our visitors and residents through research.

1. Monitoring of occupancy and ADR trends through KeyData and STR, and visitation research through ITRR, shows us that our occupancy numbers are starting to even out from the pandemic. Although we maintained our occupancy numbers from the year before, we did not increase the numbers overall in either the warm season or shoulder seasons. However, ADR continued to increase. Although this does not seem to be an issue so far for out-of-state visitation, it is becoming more of an issue we are hearing about from Montana visitors, especially in the youth sport market.
2. Here are some statistics we saw this year. For hotel ADR, in June of 2022 it was \$185.48 and in June of 2023 it was \$188.13. Numbers to our visitor center were up in FY 22-23. This year we had 5,185 calls/visitors to the visitor center. In FY 21-22 we had 2,689. We did a better job of recording phone calls and visitors to the center this year, and folks like to get personal recommendations. For the call center, numbers were down slightly this year (less than 1%). In FY 22-23, we had 225,093 calls to the call center. In FY 21-22, we had 231,323. For the web site, unique visits were down slightly this year (less than 1%). In FY 22-23, we had 1,236,201 visits to the call center. In FY 21-22, we had 1,255,763. KeyData (short-term rentals) ADR in June of 2022 was \$198 and in June of 2023 was \$206. KeyData occupancy in June of 2022 was 55.4% and in June of 2023 was 55%.
3. We have not been able to have a full contract with Zartico yet as we decided to wait until we were closer to completion of the Destination Stewardship Plan and have an understanding of the research done on both our visitors and residents. We used Key Data to monitor our short-term rental market in Missoula. While this gives us trend data, it does not supply totally accurate numbers as the information is scraped, so we are unsure of duplications across platforms. KeyData is working on finding a solution to dedupe the information. Our short-term rental market trends show marked similarities to our hotel numbers both in high and low seasons and ADR.
4. As part of the Destination Stewardship Plan, we conducted research nationally and locally to better understand our out-of-state visitor and resident sentiment. We also conducted stakeholder research to understand perceptions and alignment with our community. We released the first half of our resident sentiment survey in May before our visitor season began and had 623 responses. We also contracted with SMARInsights to conduct a national survey to understand visitor perceptions and experiences, incentives, what may keep someone from coming to Missoula, and defining which markets are most likely to respond to sustainable travel and stewardship initiatives, among other things. One interesting result from this research showed that out-of-state visitors are more likely to travel to sustainable destinations and participate in responsible recreation efforts than Montana visitors. With this knowledge, we understand that our messaging to out-of-state visitors will need to be different than in-state campaigns. Our in-state campaigns will need to be more of an educational effort toward the importance of being good stewards and ambassadors for responsible recreation and cultural preservation.
5. The Destination Stewardship Plan and all its research will be completed by December of 2023. The Plan will have the initiatives that as a community we will be working toward. We will also have a 3-year Implementation Plan which will define each of those initiatives, and who in the community is responsible for each initiative. At that time, we will better understand what further KPIs will define our success.



Grant Details

Grant: 23-51-037 - FY23 Missouri River Country DMO Plan - FY23

Status: Underway
Program Area: DOC Office of Tourism
Grantee Organization: Montana's Missouri River Country
Program Officer: Barb Sanem
Awarded Amount: \$316,979.00

Narrative Evaluation

- Bed Tax Collections:** A 3% increase in bed tax collections for FY23 is a positive sign, indicating growth in the tourism sector. The fact that our Average Daily Rate (ADR) at motels and hotels didn't change much suggests that the increase in collections is likely due to increased visitation rather than price changes.
- Photo/Video Library:** Jason Mitchell Outdoors Television came to MRC late February 2023. When he came to MRC the fishing was unfavorable along with the ice conditions. It wasn't satisfactory for filming. He offered to come back next year at no cost to MRC or FWP. We have worked with Jason in the past and have always been pleased with his work and we trust that he will get us an Ice Fishing video and safety messaging the winter of 23/24. Yes, we will continue to work with JMO in the future.
- Radio Advertising:** Advertising on the Montana Outdoor Radio Show is a valuable way to reach our target audience. We were successful in placing 5 months of advertising to 26 stations and 75 cities in Montana. The Captain talks about events, fishing, hunting, and mentions to stay in a motel when in MRC. He knows and recreates in MRC so he knows our area well. This is a successful project and yes we will continue to advertise in the future to get the word out to the outdoor enthusiasts.
- Travel Shows:** This was the first year since Covid that MRC has done a trade show. We exhibited at the Travel and Adventure Show in Dallas, TX due to the impact TX has had on MT. Attendance for the show was up. 2023 had 7,956 attendees vs. 5,380 in 2022. We handed out all our travel guides, (420), but since it was a Travel and Adventure Show our Hunting/Fishing guides didn't go quite as well at only 150. While we only exhibited at 1 show we felt it was successful for MRC. We were constantly engaging with potential visitors. We will continue to do shows in the future.
- Digital and Print Advertising:** Using digital and print advertising to promote the region is an effective marketing strategy with always following Rules and Procedures to insure Montana is noticeable to viewers. MRC received a total of 11,070 leads. Our top leads came from our Glacier Country ad and Yellowstone Journal ad. Our CTR was up 1.33% in FY23. We carefully chose the right placements. We met our goal and consider this to be successful and we will continue to place ads in top publications and online.
- Travel Planners:** MRC printed 30,000 travel planners in September 2022. Since we printed a year ago we have distributed 12,000 guides. Due to the demand we will go back to printing the guide every other year rather than every three years. We will take note the next time we print we will pay more attention to the amount the printing company puts in a box. The current boxes have 60 to a box and are very heavy and hard for people to handle. The high demand for travel planners and brochures is a positive sign, and our distribution strategy is effective using a Group Home in Plentywood. Yes travel guides are a successful project that we will continue to do in the future. <https://missouririvermt.com/interactive-travel-guide>
- Joint Ventures:** Successful joint ventures, especially with Brand MT, provided access to better marketing opportunities, and exposure in great markets. Leveraging matching funding opportunities is a smart strategy to maximize our budget and resources. Our FY23 JV's consisted of Sojern, Jun Group, and Pinterest. MRC also did a JV partnership with several other DMO's on Lewis and Clark, which is always successful. Our overall JV with the state received 1,830,318 impressions, 19,076 clicks, 1.00% CTR CPC \$2.41 in FY23. vs. 2,005,134 impressions, 3,030 clicks, CTR .015% and CPC \$3.88 in FY22. FY23 JV's were successful and yes we will continue to do them with the State. Thanks to the State for offering these with matching funds.
- Social Media:** Engaging social media with posts and photos is a cost-effective way to reach a broader audience. In FY22 social impressions were higher than usual. We dropped in FY23 but we expect to maintain or increase in FY24. Yes this project is successful and we will continue to do social media.
- Website:** Since our 2018 web redesign the newness has worn off so site visitation has been declining. Despite a recent drop, maintaining and updating the website is essential. An upward trend is expected in the future with our continually adding of content.
- E-newsletter:** An increasing open rate for our e-newsletter indicates that it's an effective marketing strategy. Our opens improved by 1 point in FY23. This is up from previous years so we do see the value of our email newsletters and will continue to send them. Yes this project is successful.
- Education and Outreach:** Using education and outreach to support locals and educate residents about tourism has been a great way to build community support and engagement. Presentations were given to the Wolf Point Chamber of Commerce and the Glasgow Chamber of Commerce. The Executive Director met with the Sidney Herald Editor and presented information about MRC.

All information was well received and it's important that we continue to inform our residents. A one sheet educational page was created and distributed to all eight counties. It provided information on what MRC's role is in the tourism industry and lodging tax statistics. The Governor's Conference was attended by the Executive Director and one board member. All TAC meetings were attended either in-person or virtually. One idea we learned at the Governor's Conference was....The Destination Analysts' presentation showed that there is still a robust market for visitors to explore Montana. Their research indicates that while there is interest in visiting the state, the key lies in maintaining consistent and engaging communication. The data suggests that potential visitors need to continue hearing about Montana and gaining a vivid understanding of what a trip to this beautiful state entails. Fortunately, the research indicates that Montana's message is not yet over-saturated, offering ample opportunities to capture the attention of prospective travelers and inspire them to embark on their Montana adventure. Yes Education and Outreach is important and beneficial for MRC. We support Voices of Montana.

12. **Product Development Funds:** Funds were used for the Talking Trail App and partnering with Saskatchewan for Beyond the 49th Parallel which are all new projects that benefit our region.
Beyond the 49th Parallel: MRC and South Saskatchewan Ready have been staying in communications. In the Spring of 2023 MRC and South Saskatchewan Ready contributed each a small amount of funding to start creating a landing page and itineraries. We have developed a name. Beyond the 49th Parallel (More room to roam) We will continue to seek funding and have a successful cross-border campaign. **Talking Trail App:** Talking Trail is an app designed to respond to the actions, commands, etc. of an adventurer, or someone who appreciates learning and having fun whenever and wherever possible. The app is free, downloadable and will connect you with rich stories from different locations (42 in MRC). Visitors are able to experience the whole story with the interactive Talking Trail mobile app or dial-in-platform. It captivates the visitors attention with an audio or video recording that shares the story of our destinations. Visitors and potential visitors can explore locations throughout MRC with the app or dial in feature located on the signs at the designated locations. 42 locations throughout MRC have been designated. MRC believes that this will be a great marketing tool. www.talkingtrail.com Montana's Missouri River Country
13. **Administration Budget:** Staying within the 20% administration budget is a prudent financial practice, ensuring that a significant portion of the budget goes into marketing and tourism efforts.
14. **Cooperative Marketing:** Collaborating with the Glasgow Chamber of Commerce on cooperative marketing projects was an effective way to pool resources and extend the reach of their events. Ensuring compliance with rules and procedures is essential for consistency.
15. **Marketing Personnel:** Tracking and reporting the hours spent on administrative tasks vs. marketing tasks by the Executive Director is a transparent way to show how resources are allocated. A payroll summary showing the breakout of hours worked on administrative tasks vs. marketing tasks along with a report of duties performed is attached to the payroll summary.
16. **Billboard Advertising:** Billboard advertising has been effective in generating impressions and promoting the Montana Dinosaur Trail facilities. 1.1 M impressions were received over the past year.
17. **Supporting Local Businesses:** Our collaborating with local businesses and Chambers of Commerce demonstrates a commitment to the local community and its economy.
18. **Montana Trail to the Stars:** We take pride in the achievements of Montana Trail to the Stars, which has received two awards in the past year. We will continue to seek funding to expand Montana Trail to the Stars that has received National Extension Tourism Collaboration recognition. <https://trailtothestars.com/>

Overall, MRC has a well-rounded and successful approach to marketing and promoting tourism in our region. The continued collaboration with Brand MT and our local organizations with a focus on both digital and traditional marketing channels should help maintain and increase visitation to our area. We anticipate ongoing success with all our projects and marketing strategies, and we plan to persistently pursue and continue to implement them.



Grant Details

118486 - FY23 DMO Plan

122513 - FY23 Red Lodge DMO Plan

DOC Office of Tourism

Grant Title:	FY23 Red Lodge DMO Plan		
Grant Number:	23-51-055		
Grant Status:	Underway		
Comments:			
Applicant Organization:	Red Lodge Chamber of Commerce/Visitors Center		
Grantee Contact:	Sherry Weamer		
Award Year:	FY23		
Program Area:	DOC Office of Tourism		
Amounts:			
Contract Dates:	Contract Sent	Contract Received	Contract Executed
Project Dates:	06/15/2022 Proposal Date	07/01/2022 Project Start	06/30/2023 Project End
Grant Administrator:	Barb Sanem		
Contract Number	23-51-055		
Award Year	FY23		
Contract Dates			

Contract Sent Contract Received Contract Executed Contract Legal

Project Dates 07/01/2022
06/30/2023

Project Start Project End

Comments
Amendment Comments

DMO Plan Narrative

1. Describe Your Destination

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

Nestled in Montana's magnificent Beartooth Mountains and surrounded by Custer Gallatin National Forest, Red Lodge delivers world-class outdoor recreation and access to Yellowstone National Park via the world-renowned Beartooth Highway. In our historic downtown, you'll enjoy locally owned shops, quality restaurants and plenty of first-class accommodations and entertainment. No matter what the season, Red Lodge is your Base Camp to the Beartooths.

The Red Lodge visitor arrives here looking forward to its natural beauty and quaint charm. What they discover is its magic. And for that, they return again and again, over a lifetime. Like so much of Montana, Red Lodge is surrounded by natural splendor -- Montana's highest peaks frame our back yards, its crystal-clear waterways tumble down our valleys, and that unique combination of pine and aspen scents invigorate our air. But as the Red Lodge visitor knows, we have something special going on here; we're just far enough off the beaten path that locals truly appreciate visitors, we want to say "Hello" when we see someone new in town, and we do not just throw out the welcome mat for you, we show you why we love living here.

Today's travelers are looking for that one of a kind of experience, and it's one Red Lodge excels at delivering.

A year-round population of just over 2,000 and an historic Main Street business district with great restaurants, shopping, entertainment, and accommodations means a stay in Red Lodge is an opportunity to make friends with locals.

Red Lodge, Montana, 2016 Gateway Community of the Year, anchors the most scenic route into Yellowstone National Park: the 68-mile alpine and structural wonder of the Beartooth Highway, an "All-American Road". Open late May-October, visitors come from around the world to experience its summer snowfields, high-mountain vistas, and legendary curves.

Sitting on the edge of a National Forest, Red Lodge lays claim to almost 1 million acres of uninterrupted and unspoiled wild country as our "backyard." Much of that is easily accessible with well-marked trails for hikers, horseback riders, and many near town are even open to bicyclists. Whatever the day's adventures entail; Red Lodge is the perfect Base Camp to the Beartooths.

OUR STRENGTHS:**Gateway to Yellowstone National Park**

The Most Scenic Route to Yellowstone Park, over the Beartooth Highway

The Beartooth Highway

Dubbed "the most beautiful roadway in America" by On the Road correspondent Charles Kuralt, the Beartooth Highway climbs to an astounding 10,947 feet above sea level. As it winds its way from Red Lodge to Yellowstone National Park, the Highway traverses an impressive range of ecosystems and geological wonders. At the highway's summit, travelers find themselves in a sky-high world of glacial cirques, clear alpine lakes, and snow that lingers through the summer months.

Gateway to the Absaroka-Beartooth Wilderness

Our back yard consists of millions of acres of high-country wilderness. As early as 1897, trails began snaking their way up the West Fork canyon, cleared by hand with saws and pickaxes. Today those same trails can take you to pristine country where visitors can enjoy a variety of outdoor activities.

Great Shops, Restaurants and Music Entertainment

Charming historic downtown hosts a variety of locally owned stores run by helpful, knowledgeable staff. Pop into one of the many restaurants for a quick burger and a locally brewed beer, or experience fine dining featuring wild game and other local fare. In 2018, eight of our local restaurants were selected to participate in Taste Our Place which is a program launched by the State of Montana. The Taste Our Place logo is a declaration of authentic Montana Quality. Relax and listen to some great music from our many local musicians or attend a first run movie at the historic Roman Theater.

Year-round Skiing

During the winter months enjoy bountiful snow, shimmering blue skies and terrain for all abilities that make for great fun on the slopes. Open from mid-November through mid-April.

During the summer months, the Beartooth Highway is your chair lift to acres of open terrain for skiing and snowboarding. For those that are not much interested in hiking there is Beartooth Basin with two permanent poma lifts for skier access to the Twin Lakes headwall.

Arts and Culture

Catch the spirit of today at one of the many art and photography galleries in town or experience various styles of art at the Carbon County Arts Guild & Depot Gallery and the Red Lodge Clay Center. For history enthusiasts, Red Lodge is home to the Carbon County Historical Society and Museum where visitors can learn about the colorful history of Red Lodge and the surrounding areas.

Events and Attractions

Red Lodge is home to many events and year-round attractions. Yellowstone Wildlife Sanctuary - Home of Champions Rodeo - Beartooth Rally - Winter Fest - National Finals Ski-Joring - Christmas Stroll - Fun Run - Iron Horse Motorcycle Rodeo - Red Lodge Songwriter Festival - Bearcreek Downs Pig Races - Beartooth Run - Shredfest, Cruisen' Red Lodge and many more.

Proximity to Billings

Billings is the largest city in Montana with a population of over 110,000 and a major transportation hub for South Central Montana. Travelers can reach Billings by air, bus or car on two east and west and north and south Interstates highways. Billings Logan International Airport is served by four major airlines United, Delta, Alaska, and American.

Amenities

Red Lodge may seem like a remote destination to some visitors, but they will be pleased to find we have the same amenities and comforts as they have at home, and more than adequate cell phone coverage and broadband internet in most areas.

OPPORTUNITIES:**Motorcycle/Auto Groups**

The Beartooth Highway was recently voted the *Number 1 Motorcycling Road in America* by the American Motorcyclist Association. It is a "bucket list" item for many motorcycle enthusiasts.

Small Groups

Red Lodge is the perfect destination for small groups. RV clubs, executive retreats, conventions of 200 people or less, craft clubs, all find the comfortable meeting spaces and hospitality of Red Lodge a great place to spur creativity, make new friendships and renew old relationships.

Weddings/Reunions

Picturesque venues, quality lodging options and numerous recreational opportunities in the surrounding area make Red Lodge the perfect setting to gather family and friends for your wedding or reunion.

Tournaments/Community Events

The newly revamped Roosevelt Center, our modern high school auditorium, and other historic venues, provide the opportunity to house tournaments as well as larger community events.

Outdoor Competitions

Challenging, yet stunningly beautiful terrain attracts competitors from around the country to a multitude of outdoor events. Included among these events are the Beartooth Run, Nitty Gritty Road Race, Collegiate Ski Races, National

Ski Joring Championships, and the summer Shredfest which is the only summer qualifier in North America for the Freeride World Tour.

Media Partnership Opportunities

Billings has a wide reach with television, radio and print media that we can better utilize with positive and timely press releases and promotional partnering. More can be done with KTVQ, KULR, YPR, and the print media options in Billings, Yellowstone Valley Women, and Magic Magazine, among others.

Annual Events

Red Lodge has a growing number of competitive, recreational and cultural events. Many of these events take place during the summer months but winter events such as the Alpine Ski Races, National Ski Joring Championships, and Winter Fest also attract visitors from in state and out of state locations. In the Summertime we have Red Lodge Music Festival, Red Lodge Songwriter Festival, Fourth of July Rodeos and Parades, Beartooth Basin Summer Ski Area, Beartooth Bike Rally, Cruisen' Red Lodge Vintage Car Show, and Labor Day Fun Run just to name a few.

Location and Way Finding Signage

Red Lodge is miles from a major highway. Montana Highway signs point Yellowstone Park travelers past Red Lodge exits or towards the Chief Joseph Highway in Wyoming. Location and Way Finding Signage has finally come to fruition and will be implemented in time for this year tourist season.

OUR CHALLENGES:

Making Red Lodge a Destination

Red Lodge is used as a 'Pass Through' for the Beartooth Highway and Yellowstone Park in the summer. If we can influence a small percentage of summer travelers to stay one additional night in Red Lodge and enjoy all the offerings of our town and surrounding area, it will make a significant impact on our local economy. In the winter months we need to reinforce Red Lodge as a winter destination to skiers and non-skiers alike. First class restaurants, comfortable accommodations, great shopping, restful relaxation, ice-skating, Nordic skiing, wildlife viewing, and hiking are a few of the winter time activities available in Red Lodge. Red Lodge Mountain is a fabulous, family-oriented alpine ski area.

The Phase I Wayfinding signage directing visitors to "Attractions" and "RV Parking/Additional Parking" has helped catch some of the "pass through" traffic/visitors, but last minute lodging vacancies are difficult to come by during our busy warm season.

As Red Lodge has gained popularity because of the space and activities visitors are seeking, there are concerns about the sustainability of tourism around the area. Therefore, the Red Lodge Area Chamber has stepped in/up to offer materials to businesses that will help educate and encourage visitors to the area to visit and recreate responsibly.

In addition to this, the City of Red Lodge has expressed concerns regarding the marketing of Red Lodge as a destination. There is no allocated Resort Tax funding via the City of Red Lodge for marketing.

Location and Way Finding Signage

Red Lodge is miles from a major highway. Montana Highway signs point Yellowstone Park travelers past Red Lodge exits or towards the Chief Joseph Highway in Wyoming.

Montana is perceived as challenging to access. In addition to the states' destination attribute weaknesses, both the Montana and Red Lodge brand brings with it this perceived access challenge.

Beartooth Highway is Seasonal

Weather and snow plow funding often delay the opening of the Beartooth Highway in the spring. Snowstorms will temporarily close the road. Timely communication of the road status is challenging with reports of closures carrying a higher priority than reports of the Highway re-opening. The portion of the Highway located in Wyoming is a secondary priority for snowplows.

Make Winter Success Less Dependent on the Snow Conditions at Red Lodge Mountain

Red Lodge Mountain is the major draw for Red Lodge in the winter season. The town's commerce follows the quality of the snow conditions on the mountain. We can reduce the dips when snow conditions are not at their best by promoting all of the other amenities, events and winter time activities going on in Red Lodge. Red Lodge is within easy reach of public access to BLM lands, Forest Service lands, and national parks. Hiking, cross country skiing, wildlife viewing, scenic drives, shopping, fine dining, and relaxing in one of our great accommodations to name a few.

Online Mapping Services

Google Maps and others report inaccurate information for routes and business addresses.

Lack of City Marketing Support

While the City of Red Lodge collects a Resort Tax, the governing body offers no marketing or promotional funds for Red Lodge.

Perceived lack of comforts/technologies

Montana is perceived to be somewhat remote and lacking many of the amenities and technologies those travelers who may be less outdoor minded are looking for.

Perceived costs and time requirements inhibit visitation to Montana. Research shows focus group and in-depth participants expressed serious concerns about the cost of a trip to Montana. Beyond the cost of traveling to Montana, many generally felt that a trip to Montana would require a significant investment of time.

COMPETITOR ANALYSIS:

Jackson Hole, WY

Popular tourism destination because of its proximity to Yellowstone & Grand Teton National Parks. Website, mobile, social media, and internet advertising resources.

Livingston, MT/Gardiner, MT

Way finding signage on I-90. Year-round entrance to Yellowstone Park.

Bozeman, MT / Big Sky, MT

Greater variety in lodging, dining and shopping opportunities, including groups, conventions and conferences. Proximity to Yellowstone Park. Four-season activities. Popular ski area. Cultural, historic, and educational activities, events, and attractions. Significantly greater marketing dollars.

West Yellowstone, MT

West entrance to Yellowstone Park. The name West Yellowstone. More lodging and dining options. Significantly greater marketing dollars.

Cody, WY

Eastern gateway to Yellowstone Park, access to five scenic byways including Chief Joseph Highway is a second route to Beartooth Highway and Northeast entrance. Lodging options, Buffalo Bill Center of the West, regional airport. By partnering with Wyoming Tourism, Cody has successfully marketed itself as "Yellowstone Country" and its airport "Yellowstone Airport." Significantly more funding for promotion is directed to Cody by local, county and state monies.

Colorado

Travelers' perceptions make Colorado Montana's top competitor. In addition to awareness, demand, excitement for and visitation at significantly higher rates than Montana, research illuminated the directly competitive relationship Colorado represents. In discussing where to go in the West and Montana specifically, it was clear that most research participants viewed Colorado as the destination they would be heavily weighing Montana against, and a more persuasive one at that. These travelers felt Colorado had similar offerings on a basic level—spectacular natural beauty, abundance of outdoor recreation, outdoor culture, winter sports. Very importantly, Colorado's cities, infrastructure and mature tourism product were seen as providing more of a "safety net," something that was keenly on the minds of those who were less on the outdoor spectrum and/or less familiar with traveling in this region of the U.S.

2. Align with Montana Brand

Briefly describe how your destination aligns with the Montana Brand.

The Montana Brand Pillars were seemingly written for Red Lodge.

Nestled in the Beartooth Mountains, with Yellowstone Park just up the road, and the Beartooth All American Highway at our doorstep, we truly offer more spectacular unspoiled nature than anywhere else in the lower 48.

A little off the beaten path Red Lodge, a historic mining town, is a vibrant and charming community that serves as a gateway to many natural wonders.

From art walks to downhill mountain bike rides, from reading a good book by the fire to skiing fresh powder, Red Lodge is a friendly, welcoming town offering a wide range of activities in every season. Enjoy breathtaking experiences by day and relaxing hospitality by night. Regardless of your choice of activities, our people work hard to make your visit an experience to remember.

Tourism Regions, Convention and Visitors Bureaus (CVBs), communities and organizations must all work together to make visitors aware of the full array of experiences available to guests.

The Red Lodge Area Chamber of Commerce/VIC/CVB is well marked via our Wayfinding Signage. During our busy summer visitor season, we are open from 8:00 am to 5:00 pm Monday through Friday and 9 am to 1 pm on Saturday. The goal is for each visitor to have a positive experience and plan their return visit to Red Lodge. Visitors are always happy to see we offer public restrooms, current conditions of Beartooth Highway, and local hiking (trail conditions), as well as offer them our Destination Red Lodge Travel planner to take with them to help guide them once they leave the Visitors Center.

We work closely with our tourism partners, TBID, the City of Red Lodge, and Merchants and Lodging Association.

Our content will focus on the three core elements travelers are looking for when deciding on an outdoor destination such as Red Lodge:

1. unique natural encounters without giving up modern comforts
2. comfortable isolation that attracts free-spirited adventurers,
3. a place for entirely new experiences and a place for new ways of experiencing the familiar.

3. What is the strategic role of your DMO?

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

Destination Marketing, Destination Management

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

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

The High Potential Visitor

This group is clearly a high-value audience; it is different from other travelers in important ways. Behaviorally and demographically, the survey shows that high potential Montana visitors have a remarkable and distinctive profile. This group of heavy travelers is not only attracted to Montana, they see the destination as more attractive and competitive when compared to the regional competition. In brief, high potential Montana visitors are:

- City dwellers (i.e., not rural and not suburban)
- Married with children
- Well-educated, Affluent
- Younger
- Frequent travelers
- Male-oriented (54.3% male and 45.7% female)
- Strongly attracted to Montana's tourism offering
- Familiar with Montana's tourism offering
- Likely repeat visitors
- Outdoor-oriented travelers

These high value potential Montana visitors are also heavy consumers of recreational activities. This group is interested in a diverse array of Montana activities, centered around day hiking and visits to the National Parks.

Family travelers are a natural fit with Montana's travel product, including that available in the Eastern portion of the state. They are a large and lucrative segment. In the Montana Brand Exploration Survey, approximately one-third, 32.0 percent, of travelers reported having children under the age of 18 in their homes. Like high potential visitors, family travelers index high on outdoor psychographics, have high incomes and would expect to spend more and stay longer in the state than other travelers. Family travelers are interested in a variety of Red Lodge experiences, but their ideal trips would appear to center around Yellowstone National Park, day hiking, horseback riding, and driving scenic byways. This niche market also expresses significant interest in child-friendly activities related to history, culture and geology.

Red Lodge offers affordable vacation opportunities to families visiting Montana for the first time or coming back on a repeat visit. 85% of visitors surveyed responded they will return to Montana within the next two years. These returning visitors are a significant target for our CVB.

Geo-tourism is defined as tourism that sustains or enhances the distinctive geographical character of a place—its environment, heritage, aesthetics, culture, and the well-being of its residents. **Geo-travelers** are high-value, low impact visitors who appreciate the unique characteristics, eccentricities and natural qualities of Red Lodge. They place high value on travel experiences that respect and support the local character of place and are less likely to become discouraged in their travel experiences by travel distances/difficulties and vagaries of weather.

History Buffs

History buffs score higher on the psychographic index, have proven to have higher incomes and would spend more and stay longer compared to non-history buffs.

Our Traveler at a Glance

- Healthy, Active, Outdoor Enthusiasts
- Arts, Crafts, Entertainment Enthusiasts
- Motorcyclists and Auto Enthusiasts
- RV Enthusiasts
- Empty Nesters/Active Retirees
- Income: AHI of \$50,000+
- Education: Bachelor's Degree
- Age: 35-65

Core Geographic Markets

Red Lodge is located in the South Central portion of Montana. We are the gateway to the Northeast Entrance to Yellowstone Park via the Beartooth Highway. Because of our geographic location, the majority of visitors come from east of us.

Summer

California, Florida, Texas, Wyoming, Idaho, Colorado, Washington, and the Mid-Western States, particularly Minnesota and Wisconsin.

Winter

California, Florida, Wyoming, North Dakota, Minnesota, and SK/MB Canada are key winter markets.

Key Psychographic Markets for Red Lodge.

- Social Class - middle to upper class (in terms of disposable income)
- Lifestyle - active, outdoor recreational oriented, frequent travelers
- Opinions - interested, but primarily influenced by desire to experience things for themselves
- Attitudes & Interests - outdoor activities, history & culture, foodies
- Attitudes & Beliefs - environmentally conscious, has an adventurous spirit, likes nature
- Technology - savvy - using mobile devices in all stages of planning & travel

3b. What research supports your DMO strategy?

Demographic Research

(ITRR 2017 Interactive Data Non-Resident Travel Survey Report) *

- Average Age - 57
- Age Groups —47% 55-64, 43% 65-74, 21% 45-54, 23% 35-44, 21% 25-34

- Gender - 53% Male, 47% Female
- Group Size - 52% Couple, 5% Self, 31% Immediate Family
- Average Group Size - 2.43
- Household Income – 23% Less than \$50k, 7% \$75-\$100k, 13% \$50-\$75k, 29% \$100-\$150k

**All percentages taken from online ITRR reports with 72 respondents*

Facebook Demographics – Top 4 Categories, 65%, are women

- 15% Women 35 to 44 Years
- 16% Women 45 to 54 Years
- 10% Women 25 to 34 Years
- 13% Women 55 to 64 Years
- 9% Women 65+ years

Geographic Research – Non Resident

ITRR – Non Resident

- ITRR 2014 – Texas, Minnesota, Missouri, Kentucky, Arizona
- ITRR 2015 – Wyoming, Minnesota, California, Colorado
- ITRR 2016 – Wyoming, Minnesota, Washington, Colorado
- ITRR 2017 – California, Wyoming, North Dakota, Idaho, Wisconsin

RedLodge.com Travel Planner Requests

1859 Travel Planners were requested during FY 21. One of our most popular pieces of literature is our Destination Red Lodge Travel Planner. Red Lodge continues to become an increasingly popular destination for travelers as Red Lodge so much of what the pandemic traveler and travelers in general are looking for: great outdoor recreational opportunities, wildlife viewing, close proximity to Yellowstone National Park, a variety of lodging options, shopping, and many delicious eateries to choose from. The Midwest accounted for 37% of all requests. Top states were Minnesota with 9% and Florida and Texas with 5%

Facebook – Top 5 Cities (Outside Montana)

- Cody, WY
- Bismarck, ND
- Powell, WY
- Denver, CO
- Gillette, WY

Facebook – Top 5 Cities (Within Montana)

- Billings
- Red Lodge
- Bozeman
- Laurel
- Missoula

ITTR 2017 non-resident study data showed the average length of stay for non-resident visitors to Montana was 7.31 nights with 78% of in Yellowstone Country. 57% of the Non-resident travelers stated their primary reason for coming is vacation/recreation/pleasure, which leads to the supposition that they want a broader experience than just visiting Yellowstone Park.

The following 2017 ITTR data outlines what visitors are doing while in our area.

- Scenic Driving - 70%
- Wildlife Watching - 60%
- Day Hiking - 57%
- Recreational Shopping - 33%
- Visit local brewery - 29%
- Nature Photography - 27%
- Visiting Museums - 22%
- Fly fishing - 20%
- Car/RV camping - 18%
- Visiting Historical Sites - 18%
- Attending Festivals and Events – 17%
- Followed by river rafting/floating, farmers markets, birding, skiing/snowboarding

Beartooth Highway Economic Impact Research

During the winter season, Red Lodge, MT is not considered a gateway community because of road closures limiting access only to Cooke City/Colter Pass/Silver Gate, MT and Cody, WY (via the Chief Joseph Scenic Byway).

Nonresident visitor expenditures contributed to over \$41.1 million in economic activity to Carbon County in 2016, the vast majority being spent in Red Lodge. The economic impact for this region from nonresident travelers is substantial to local communities. Furthermore, results identified that nonresidents perceive the Beartooth Highway as a destination in itself, not simply a highway.

2015 average spending in Carbon County by nonresident visitors to Montana totaled \$63.4 million. This \$63.4 million in local spending directly supports \$40.2 million of economic activity in the region, and supports an additional \$16.1 million of economic activity, indirectly.

Source: http://scholarworks.umt.edu/cgi/viewcontent.cgi?article=1352&context=itrr_pubs

3c. What are your emerging markets?

Two Wheel travelers

Motorcyclists and bicyclists are attracted to the Beartooth Highway for its beauty and challenge. This segment of the tourism market is growing and important as they view the Highway as a destination and spend multiple nights in our area.

Foodies

Red Lodge has an array of excellent restaurants, an award winning craft beer brewery, gourmet food and wine shops, for those travelers that seek unique dining experiences. Adventure is food for the soul, and food is fuel for the adventure. After a long day in the great outdoors, there is nothing quite like a warm meal. But not just any warm meal...a really good warm meal with good company. Whether visiting the local burger joint or enjoying an elegant, farm-to-table meal, dining in Red Lodge is sure to please everyone. With a rich agricultural heritage, Red Lodge has a wonderful selection of locally grown products that translates to a thriving dining scene.

Entertainment/Music Seekers

On any given night there are a number of bars and restaurants that feature live music, both local artists and touring bands. During the course of the year, events such as The Red Lodge Music Festival and the Red Lodge Songwriter Festival bring world class musicians to Red Lodge to share their art.

Billings

Billings is 60 miles away and has a population base of approximately 160,000. The Billings Convention and Meeting market is growing and we will continue to develop our relationship with the Billings CVB, Visit Billings. The Billings market is the perfect target to strengthen our winter destination business, especially on non-holiday weekends.

Corporate Retreats

Red Lodge is the perfect place for executive retreats and small group gatherings for associations, social clubs and private companies located in Billings and Bozeman.

Areas to the East

Eastern Montana, North Dakota, and Minnesota continue to be strong markets and will be the focus for our Winter destination marketing.

Colorado & other Mountain States

We have listed Colorado previously as a competitor for non-resident visitors. However, state tourism data and our own information indicate a rising interest in visiting Montana and specifically Red Lodge from Coloradans. As their own tourism industry continues to grow and their population continues its rapid growth, the competition for outdoor space grows in equal proportion. Many Colorado residents especially those from major metropolitan areas are looking for less crowded, less expensive, simpler destinations, much the way Colorado used to be. Red Lodge is the perfect fit, an 8-9 hour drive or a one hour direct flight from Denver, their largest metropolitan area.

4. Define and describe your overall goals.

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

The overall goal of the Red Lodge CVB is to increase tourism for our area. The Red Lodge area still has a decline in tourism numbers during the winter months. Therefore we will focus on the winter traveler for cooler weather related activities such as skiing, snowshoeing, cross country skiing, winter hiking, ski joring, photography and wildlife sightings while also continuing to draw the high value visitor for our warm season as there is still room to increase these collections as well.

1. The DMO wants to continue to grow the busy warm season (July-August-September), but also increase visitors to our fall and winter seasons (October – March).
2. The DMO will begin Phase II of our Wayfinding signage project focusing on the 4 entrances to Red Lodge (N via US 212, S via US 212, W via Hwy 78, and E via Hwy 308).
3. Encourage residents and visitors to keep the Red Lodge area a safe tourism destination by traveling responsibly, leaving no trace, practicing wildland fire safety, being kind, respectful and patient with one another and by recreating responsibly.
4. Continue to Build Marketing Infrastructure

This will include, but not be limited to:

Consistent and informed Visitor Information Center staffing to enhance the guest experience and educate them to all Red Lodge and the surrounding area has to offer.

- Increase Travel Planner Mailers
- Increase public awareness of what is happening in the Red Lodge area with targeted and regular e-news
- Increase social media reach through Facebook, Instagram, and Twitter
- Continue to promote local events.

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

Tactic 1: Targeted advertising campaigns promoting fall/winter events, such as our popular Christmas Stroll, wildlife viewing, snowshoeing, skiing, and ice skating by expanding our advertising.

Tactic 2: Targeted advertising campaigns promoting warm weather activities unique to our area such as hiking, scenic motorcycle rides, wildlife viewing, camping, fishing, or enjoying a day walking our beautiful and historic downtown while enjoying unique shopping and dining options.

Tactic 3: Improve the visitor experience by providing consistent accurate area information via visitor counselors, travel planners, and additional Wayfinding signage as well as mainting and improving our visitor information center.

Tactic 4: Producing and distributing brochures in conjunction with our TBID and making presentations to our business partners and city council.

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Objectives/Metrics/Evaluation

Objectives	Measurable Metrics for Success	Report the Metric Achieved	Evaluation of Measurable Metrics for Success
Communicate keeping Red Lodge a safe and thriving tourism destination by educating visitors to visit Red Lodge responsibly.	Distribute visitor information re: "Visiting Red Lodge Responsibly" to area businesses. Present at 3 community events on keeping Red Lodge a competitive and sustainable visitor destination.	Yes, we were able to present the "Happy Trails" information at 3 community events as well as providing these brochures to area businesses for distribution to visitors.	Yes, we met our objective and yes the method was successful. We will continue to distribute the Happy Trails brochures with the simple change to incorporate Visit Montana's "Leave No Trace" wording and message to visitors and provide the brochures to area businesses to have available for visitors.
Increase contact database through travel guide requests.	Increase annual travel guide requests from 1900 in FY22 to 2100.	Yes, we increased the annual travel guide requests from 1900 in FY22 to 2189 in FY23.	Yes, we met our objective and yes this method was successful. We will continue to track travel planner request numbers.
We will begin Stage 2 of our Wayfinding Signage focusing on the 4 entrances to Red Lodge (78 West, 212 North and South, and 308 East).	Signs manufactured and installed will be our measurement for success.	This metric was not fully achieved due to flooding.	We partially met our objective as the Stage 2 Wayfinding "Welcome" signs have been manufactured and we know that our Stage 1 Wayfinding Signage is a successful method, but the Stage 2 Wayfinding "Welcome" signage locations have to be redetermined due to the 2022 flooding.
Increase lodging tax collections while improving the overall visitor experience.	Increase lodging tax collections for the DMO by 2% over FY22 collections, while improving the overall visitor experience.	We did not increase lodging tax collections for FY23 over FY22 collections.	We did not meet our objective and this method was not successful due to June 2022 flooding. We do feel this method could still be successful and has been successful previously.

DMO Budget

Allowable Methods	Amount Budgeted	% of Budget Allocated	Amount Expended	% of Budget Expended
Administration	\$11,123.60	14.75	\$7,659.75	68.86
Earned Media/Tourism Sales	\$500.00	0.66	\$548.94	109.79
Education/Outreach	\$1,500.00	2.0	\$2,937.12	195.81
Joint Venture	\$9,975.00	13.23	\$3,000.00	30.08
Opportunity Marketing	\$500.00	0.66	\$0.00	0
Paid Media	\$15,100.00	20.03	\$10,375.12	68.71
Product Development	\$25,196.40	33.42	\$4,655.00	18.48
Visitor Services	\$11,500.00	15.25	\$9,112.91	79.24
	\$75,395.00	100.00	\$38,288.84	

Narrative Evaluation

One of our primary objectives; to increase lodging tax collections for the Destination Marketing Organization (DMO) by 2% over the collections from FY22. This goal was established to support the DMO's ongoing initiatives and marketing efforts, ensuring continued growth and success in promoting our community as a travel destination.

However, despite our best efforts and strategic planning, this goal was not achieved. Our collections were down 1% from FY 22 in FY 23. The unexpected and unprecedented occurrence of a 1000-year flood in our community had a profound and widespread impact, including on our ability to increase lodging tax collections. The flood disrupted normal business operations and travel plans for visitors. As a result, we faced reduced occupancy rates and lower overall tourism activity. These circumstances made it exceptionally challenging to generate the anticipated increase in lodging tax collections.

The flood also created a unique obstacle regarding our Stage 2 Wayfinding Signage project. Although the signs were successfully manufactured, their placement was delayed due to the flooding's impact on the designated locations. To address this setback, we are actively working on relocating some of the placements to ensure they are optimally positioned to guide visitors and enhance their experience in our community.

While facing some hurdles due to flooding, we are excited to report we exceeded our goal of 2100 travel planner requests with a total of 2189 travel planner requests. This is a result of our ability to participate in Joint Ventures with Yellowstone Country utilizing online digital advertising through Windfall. We also took advantage of Print Advertising opportunities in Southeast Montana Magazine (Distribution of this magazine is 80,000 copies with an estimated readership of 230,000), Cody Enterprise (distribution of 130,000 copies delivered to 7 different states (Wyoming, Montana, North & South Dakota, Idaho, Utah, and Nebraska- which are in our drive market), American Road (audience of around 100,000 readers and distribute 2,800 copies), and Road Runner Magazine (readership of 232,567 and 96% of their readers use RR to plan their trips each year). These Print and Digital Advertising efforts represent our determination to bounce back from the flood's impact by highlighting Red Lodge's appeal as a travel destination. Red Lodge offers an abundance of unique outdoor recreational opportunities as well as one of the most scenic drives in the United States, the Beartooth Highway.

Additionally, we presented our "Happy Trails" initiative at three important community events: the Business & Lodging Association, City Council, and a Beartooth Recreational Trails Association meeting. The enthusiastic reception and appreciation from these key community stakeholders underscored the value of our efforts in Destination Management. "Happy Trails" not only promotes our town but also celebrates our trails and backcountry spaces, reinforcing our commitment to sustainable tourism and outdoor enjoyment.

As part of our ongoing commitment to responsible tourism, we are excited to announce our transition to the official VisitMT "Leave No Trace" messaging. This step aligns with our values of preserving and protecting our natural resources, ensuring that our town remains a pristine and inviting destination for years to come. By adopting these principles, we demonstrate our dedication to responsible tourism practices and environmental stewardship.

For FY23 we had 1000 bags with our logo and Red Lodge Montana created, 1000 lip balms, and 1000 pens which were included in "welcome packets" and given to participants of the Montana Gravel Tour, Beartooth Run, 24 Hours of Elk Basin, Whistle Pig Adventure Race, Red Lodge Randonnée, the Montana Historical Society Conference, and the Red Lodge Car Show. These carefully curated promotional items were designed to leave a lasting impression on event participants and conference attendees and encourage a return visit to Red Lodge.

To conclude, our journey through the challenges posed by the 1000-year flood has been marked by resilience and determination. Despite initial setbacks, we not only met but exceeded our travel planner request goal, ensuring our community's continued appeal to travelers. We overcame obstacles related to our Wayfinding Signs project and received positive feedback on our "Happy Trails" initiative. Our transition to the "Leave No Trace" messaging further solidifies our commitment to sustainable tourism. As we move forward, we remain focused on our mission to showcase the beauty of our town, trails, and backcountry spaces while preserving them for future generations to enjoy.

Reg/CVB Required Documents

Description	File Name	File Size
FY23 Red Lodge Certificate of Compliance	FY23 Certificate of Compliance.pdf	503 KB
FY23 Red Lodge CVB BOD DMO Approval	FY23 DMO Approval.pdf	119 KB
Red Lodge BOD Bylaws	Red Lodge ByLaws Updated-Revised-Accepted.pdf	187 KB



Grant Details

Grant: 23-51-039 - FY23 Visit Southeast Montana DMO Plan - FY23

Status: Underway
Program Area: DOC Office of Tourism
Grantee Organization: Visit Southeast Montana
Program Officer: Barb Sanem
Awarded Amount: \$1,067,548.00

Narrative Evaluation

Overall, we are pleased with our marketing results in FY23, specifically the work on destination development projects in addition to executing the FY23 marketing plan. Additionally, we would like to highlight some additional projects and other marketing "wins" that Visit Southeast Montana staff and agency completed.

- Montana's Trail to the Stars - launched July, 2022 & awarded Campaign of the Year at Montana Governor's Conference on Tourism and Outdoor Recreation)
- Badlands to Breaks to Beartooths – a four region collaborative project, lead by Visit Southeast Montana, to connect these three distinctive geographical features for road trippers. To launch in March, 2024
- Travel guide renovation – the first since FY16. The design will extend to the website in 2024.
- Southeast Montana Burger Trail – secured an Eastern Montana Tourism grant, which will allow Visit SEMT to launch a second "phase" of the Burger Trail passport.
- Billings Airport Installation – secured an agreement with BIL to install 64 linear feet of inspirational art to promote visitation to the region. It will be viewed by more than 400,000 travelers annually.

See the attached one-sheet document for more information about these additional "wins" for Visit Southeast Montana in FY23.

We would also like to share a success of great significance, mainly over a longer term. Traffic at *southeastmontana.com* over the past five years as increased dramatically, specifically in FY23, as seen on the graph below, which is based on these stats:

FROM FY19:

87,327 visitors & 149,841 page views

TO FY23:

531,561 visitors & 1,105,429 page views

Those numbers translate to a **71.5% increase in visitors and a 637.7% increase in page views** since FY19. We are incredibly proud of these gains. Looking ahead, we will continue this trend with a website renovation (which was started in FY23 but halted due to staff shortage) that will include more video components.

Lastly, we feel that the new reporting process is more streamlined than previously, and one thing we continue to realize is that a plethora of external factors, such as weather, road conditions, gas prices and so forth affect our metrics. Everything is interwoven. For example, the Montana Trail to the Stars is heavily dependent on other agencies, like Bureau of Land Management and Montana State Parks, for infrastructure like roads. All of these components tie into the effectiveness of our annual marketing plan.

We continue to work and move the dial for Visit Southeast Montana and the state, with FY23 lodging tax collections being up 6% yoy in FY23. While we may not top FY22, the real first full year of travel post-pandemic, we anticipate revenues to flatten in calendar year 2023 and FY24. We are putting considerable staff and agency effort into destination development projects like the MTTTS, the Southeast Montana Burger Trail (passport launch in Dec, 2024) and the "Badlands to Breaks to Beartooths" (launch March 2024) that recognize the unique attributes of Eastern Montana and help disperse visitation across the entire state, specifically rural areas.



Grant Details

Grant: 23-51-039 - FY 23 Southwest Montana Marketing Plan - FY23

Status: Underway
Program Area: DOC Office of Tourism
Grantee Organization: Southwest Montana
Program Officer: Barb Sanem
Awarded Amount: \$1,223,593.00

Narrative Evaluation

Southwest Montana

Narrative Evaluation

FY 22/23

For fiscal year 22/23 Southwest Montana had a 13.27% increase in bed tax collections over fiscal year 21/22.

Goal 1. Raise awareness of Southwest Montana to inspire first-time and return visitors.

We used multi-media marketing including print, online, digital, and printed materials. Our results included: Digital overall \$.29 cpc; leads were 21,111; Print advertising reached over 1,237,000 in circulation and we \$4.32 cost per thousand.

We had 10.5 million impressions served; Over 3 million added value impressions; 157,505 clicks; 1.5% average CTR; \$4.32 cost per thousand impressions; \$.29 cost per click.

We had great collaboration with partners for joint ventures. All our joint ventures have been successful. Joint ventures with the state included: Sojern, Jun Group, Teads, Brand USA Canadian Multi-Channel. Our joint venture with the University of Montana is getting great traffic on the website with over 36,846 page views. The top pages are Continental Divide, Big Hole Valley, Helmsville, Richest Hill on Earth, and Helena, The Capital Town. People stay on the site from 2:15 - 4:00 minutes. We have added routes and photos to the Glaciers to Geysers Motorcycle booklet and website.

Social Media - Throughout FY23, we put emphasis on both engaging with our current Facebook audience and reaching a new audience. Facebook remains our largest presence across social media channels and has continued to provide the best return on investment. As such, we spent most of our social media efforts targeted to Facebook and saw significant results.

- We significantly improved our engagement rate on Facebook. Our reach (at 1,521,147) is up 63.8% over last year.
- We placed a higher emphasis on engaging with our audience on Facebook, replying to comments, asking questions, and reacting to comments/shares. This resulted in a total of 60,404 content interactions, up 817.6% year over year.
- Our Newsletter has over 24,246 subscribers and we had an increase of 28.7% in subscribers over last year. Our average monthly open rate is 40.5%.

Goal 2. Increase information to assist local and regional travelers, and aspiring travelers to the region.

Visitors still like to have maps, brochures, and literature in their hands as they travel through our region and visit our attractions. We printed 130,000 travel guides that went out to the brochure racks around the state and Coeur d'Alene, Spokane, Idaho Falls and Salt Lake City. Our travel guide has detailed information and maps for the visitors so they have most of the information they need right at their fingertips.

We disseminated travel guides, tear-off maps, and birding brochures to our partners through a brochure exchange, and we dropped off lots of information to many of our attractions, campgrounds, and accommodations. We have about 80% return visitation and many people returning are asking for our latest travel guide.

Southwest Montana had two new pilot projects that included a Chocolate Lovers Trail and a Book Trail. They were passport projects and the people who responded had a great time on their trails. The purpose of these two pilot programs is to engage and get people moving around the region. The Bookstore Trail will move into a statewide trail and will include a few other regions. We had great responses to these and they will be continued in the next fiscal year.

Our website is continually updated with new information, photos, and videos. We produced a Ghost Tour Map and a Continental Divide Map with Itineraries. Both are up on our website. They will be continued in

the next fiscal year. We have added a film destination site as well.

Sections that Saw Increased Visitation

1. Ghosts - 57300 (85.2% increase year over year)
2. This is Montana
 - a. 19,591 (109.55% Increase)
 1. Average time on page – 2:55 which is almost a minute over the site average.
 2. Continental Divide was the top page for this section.
3. Events - 83,691 pageviews (increase 38.55%)
4. Order A Travel Planner (Page visits ... not actual requests) - 12,176 (increase of 70.3% year over year)

We transferred our call center to the Butte Convention and Visitor Center. They fulfill all our requests for travel guides, birding brochures and special requests.

Frontline Fam Tour - Southwest Montana took a bus to Augusta and Lincoln for the frontline fam tour. We learned all about Augusta, their attractions, businesses, and restaurants. This was a great trip and stimulated a couple of follow up trips for the Chocolate Trail and their famous rodeo. We have some great photos, videos, and are all much more familiar with the community.

We also went to Sculptures in the Wild in Lincoln for a full tour and major updates. We followed up with video and blog information. We also toured High Country Jerky which is not only a gift shop but also a museum of wildlife animals. They also joined the Chocolate Trail.

Goal number 3. Increase photos, film, video, and stories of the region.

Southwest Montana now has a library of 534 user generated assets. Most of these come from Instagram and acquired through Crowdriff.

High Resolution Photos:

- Chocolate Trail – chocolate photos in addition to business photos (382 photos)
- Big Hole Battlefield (116 photos)
- Montana Learning Center (9 photos)
- Helena Mansion District & Reeder's Alley (42 photos)
- Garnet Ghost Town (48 photos)
- Pipestone (13 photos)
- Photos from Lisa Wareham Edwards Photos and Jim Ward

Produced Videos:

- Happy Holidays
- Visit Helena
- Townsend Fall Fest
- Edgewater Farms Corn Maze
- Goosebay Glass
- Grant-Kohrs National Historic Ranch Holiday Open House
- Yule Night in Philipsburg
- Rocking Z
- +Drink It In Videos
- Have also posted 32 YouTube Shorts to date

Drink It In:

- Updated not only the map, but the entire website to reflect the branding and quality of project upheld by Southwest Montana. The new site can be found at: DrinkItInMontana.com
- Published 2 new videos – Canyon Ferry Brewing in Townsend, MT and Stonehouse Distillery in Winston, MT
- Produced a 3rd video to be released in December – Beaverhead Brewing in Dillon, MT

FY23 stats from "Google Web Stories" using the Localhood Joint Venture from the state. First post was Feb 5, 2023

1. 12 Published Stories (Old Works Golf Course, Bannack, Stargazing, Homestake Lodge, 5 Things to do in Butte, Wildlife, Ruby Valley Brew, Butte Brewing, Lewis & Clark Brewing, Sculpture in the Wild, Virginia City and Stonehouse Distillery)
2. 252,451 Google Impressions with 1.63% Google Click Through Rate



Grant Details

Grant: 23-51-056 - FY23 West Yellowstone CVB DMO Plan - FY23

Status: Underway
Program Area: DOC Office of Tourism
Grantee Organization: West Yellowstone Chamber of Commerce
Program Officer: Barb Sanem
Awarded Amount: \$589,799.00

Narrative Evaluation

Destination Marketing

One of our top priorities of marketing the Town of West Yellowstone is to increase our lodging tax collections over the prior year. This past fiscal year we saw a dip in our bed tax dollar collections due to the flooding during the summer of 2022, but ended up with only a 2.17% decrease from FY22 – which is much better than we expected. The flood, while not directly hitting West Yellowstone, impacted our visitor travel plans, creating reduced occupancy and less tourist visitation and activity.

Website:

July 1, 2022 – June 30, 2023

304,902 users

365,934 sessions

628,280 page views

5,431 travel guide downloads

Website traffic is critical and vital to our success. We have been working on the SEO of our website, tying in specifically crafted SEO blogs and social media posts to help drive traffic. We have also been focusing on driving traffic through QR codes, specifically to our Travel Planner page and to our newly designed Recreate Responsibly webpage. We are focusing our content not only on things to do in West Yellowstone, but also how to recreate and travel safely as well as being a responsible visitor while visiting. We have also incorporated the 7 principles of the Leave No Trace initiative and are encouraging the businesses in our town to go through the free training provided by Leave No Trace.

Travel Planners: We once again printed 45,000 Travel Planners and distributed them throughout Montana, Idaho, Wyoming and Utah. We had 5,431 PDF direct downloads from our website in FY23 versus 879 direct downloads during FY22. Travel Planners continue to be a driving force to our website, supported by a 517% increase in downloads. This year we also created a flippable PDF version on our website in addition to a downloadable PDF and a form to request a mailed hard copy.

Newsletters: We have a very healthy newsletter subscription base of 39,116 with an open rate of 32%, up from 21% in FY22. For the flood emergency emails that we sent out we saw a 45% open rate. We also utilized our agency's email list this year, extending our reach even further.

Social Media: Throughout FY23 our goal was to increase our social media engagement of current followers while also attracting new followers for both Facebook and Instagram, while also concentrating on elevating the content that we were putting out. Facebook saw a **4,291,285** Reach with **18,364** Follows, **2,107** YTD New Page Likes & **14,325** YTD Page Visits. Instagram saw a **162,331** Reach with **7,315** Follows, **1,198** YTD New Follows & **6,563** YTD Page Visits.

Paid Media: We used multi-media marketing including print and digital – however focusing more on digital throughout the year. We partner with and support many of the events within our community, helping boost their advertising and reach, such as West Yellowstone Ski Festival, Kids N Snow, NAIFC Ice Fishing Tournament, Music in the Park.

Destination Management

We saw last summer, more than ever, the impact of crisis communication and the role it plays in Destination Management for our Town. Destination Yellowstone quickly became the hub for correct and vital information impacting our Town and neighboring areas. We were able to immediately create a Flood emergency page on our website with a banner on our homepage. We made hourly updates as well as sending out emails, twice, sometimes three times a day to our community. This emergency helped us to start a crisis communication plan that we are sharing with all partners to our community.

Overall FY22 was a successful year for us, just in a different way than we originally thought it would be. We had to sideline some projects and bring forward many others due to the flood. However, what it taught me is that we are a resilient community and we, Destination Yellowstone, learned above all else to pivot with what we are given and that by being a strong yet calming voice in our community we can lead by example and persevere during the toughest challenges.

YEAR IN REVIEW 2022-23

WHITEFISH

• MONTANA •

CONVENTION & VISITORS BUREAU

Dear Explore Whitefish Members and Partners,

Thank you for your partnership and support for Whitefish's hospitality and tourism industry. The challenges our community has faced over the last few years have made it abundantly clear why tourism management is important to our community.

The unprecedented challenges we have faced together have redefined the mission of Explore Whitefish and further sealed our focus on providing our partners and residents with a balanced sustainable tourism model.

This Annual Report will highlight our 3 primary areas of focus:

- **Tourism & Hospitality Demographics and Economic Impact**
- **Community Stewardship**
- **Tourism Management Messaging & Campaigns**

Thank you again for your partnership and support. We look forward to a very successful FY24!

Warm Wishes,



Mariah Joos

Board Chair, Explore Whitefish



Julie Mullins

Executive Director, Explore Whitefish

Mission Statement

Fostering sustainable tourism through inspiration, education, and partnerships to enhance, protect and preserve our viable year-round community.

Vision Statement

Achieving long-term economic and community sustainability through steadfast destination stewardship.

EXPLORE WHITEFISH: Established by the City of Whitefish in 2006, Explore Whitefish is the official designated non-profit destination management organization charged with tourism management and destination stewardship for the City of Whitefish.

BOARD MEMBERS

MARIAH JOOS, Chair, Nelson's ACE Hardware

JESSIE FARNES, Vice Chair,
Montana Coffee Traders

RHONDA FITZGERALD, Secretary & Treasurer,
Garden Wall Inn

EDNA WHITE, Averill Hospitality

ERICA TERRELL, Glacier Restaurant Group

KIMBERLY WORTMAN, Big Mountain Commercial
Association

LAUREN OSCILOWSKI, Spotted Bear Spirits

MAGGIE SCHWENKER, Montana Coffee Traders

MATT GEBO, Whitefish Mountain Resort

STAFF

JULIE MULLINS, Executive Director

DAN HANSEN, Director of Marketing and Sales

LUKE WALRATH, Business Manager

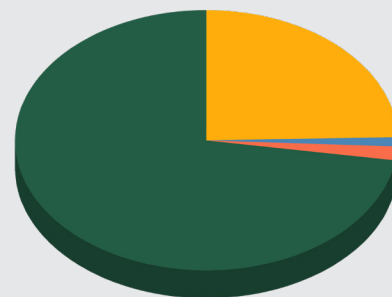
AGENCIES

DVA ADVERTISING, Advertising & Creative

BRIAN SCHOTT, Public Relations

EXPLORE WHITEFISH OPERATIONS AND FINANCE

FY23 REVENUES



● MT Lodging Facility Use Tax: \$226,224

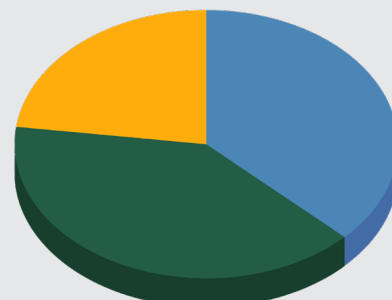
● Private Retail Membership: \$15,154

● CSF Membership: \$766,588

● Travel Guide: \$5,025

Total: \$1,012,991

FY23 EXPENSES



● Community Sustainability & Tourism
Management: \$384,034

● Administrative & Operational: \$220,905

● Non-Summer Marketing: \$357,933

Total: \$962,872

(FY23 = July 2022 through June 2023)

FACTS AND FIGURES

WHO'S VISITING WHITEFISH?

934,000

NONRESIDENT VISITORS WHO SPENT AT LEAST ONE NIGHT IN WHITEFISH IN 2022

- 7.4 NIGHTS (AVG. LENGTH OF STAY IN MONTANA)
- 2.4 AVG. TRAVEL GROUP SIZE
- 59 AVG. AGE
- 20% TRAVELED BY AIR
- 72% REPEAT VISITORS
- 28% FIRST TIME VISITORS

Source: Institute for Tourism and Recreation Research at the University of Montana

HOW MUCH DO OUR VISITORS SPEND IN WHITEFISH?

2022 (Jan – Dec) VISA® Visitor Card Spend

\$129,306,039

CARD SPEND: POINT OF PURCHASE DATA; ABOVE REVENUES DO NOT INCLUDE ONLINE PURCHASES. Source: Visa Destination Insights



WHITEFISH VISITATION THROUGH THE YEARS

2018	1,092,000
2019	1,088,000
2020	1,482,000
2021	1,207,000
2022	934,000

Source: Institute for Tourism and Recreation Research at the University of Montana

FY23 TRADITIONAL LODGING & HOTELS OCCUPANCY

	OCCUPANCY	YEAR OVER YEAR CHANGE
Q1 (JULY – SEPT '22)	76.6%	-4.29%
Q2 (OCT – DEC '22)	48.97%	-2.07%
Q3 (JAN – MARCH '23)	52.13%	3.78%
Q4 (APRIL – JUNE '23)	63.13%	0.91%

Source: Smith Travel Research

TOP VISITOR MARKETS TO WHITEFISH

1. Seattle-Tacoma-Bellevue
2. Los Angeles
3. Missoula
4. Dallas-Fort Worth
5. Portland-Vancouver-Hillsboro

Source: Visa Destination Insights

TRADITIONAL LODGING & HOTEL

FY23 (July 1, 2022 – June 30, 2023)

Available Rooms	1217
Occupancy	60%
Average Daily Rate	\$158

Source: Smith Travel Research

SHORT-TERM RENTALS

Whitefish Zip Code 59937

FY23 (July 1, 2022 – June 30, 2023)

Available Listings (AVG)	1132
Available Listings (Peak)	1261
Occupancy	52%
Average Daily Rate	\$379
Avg. bedrooms per listing	2.5

Source: AirDNA

COMMUNITY STEWARDSHIP

FOR A BETTER WHITEFISH

Explore Whitefish is the officially designated organization charged with destination marketing and stewardship of Whitefish.

Tourism touches everyone in our community. Explore Whitefish has the important responsibility of educating travelers about our destination attractions, our offerings, and the importance of integrating into small mountain town culture. Explore Whitefish works to balance the needs of our residents, our member businesses, and the City of Whitefish.

The Explore Whitefish Strategic Plan is updated annually with goals approved by our Board of Directors and representative of what is in the best interest of our community and partners. Destination stewardship was formally incorporated into our Annual Mission in 2017 and since that time Explore Whitefish, our members, and our Board of Directors has focused on preserving our culture, our authenticity, and making meaningful investments in important residential projects.

HOW HAS **EXPLORE WHITEFISH** BEEN A STEWARD OF OUR HOME?

- Working to help solve workforce housing issues
- Working to help solve our staffing issues
- Reinvesting in our community

*Explore Whitefish places our highest priority on our community and remains focused on working **#forabetterwhitefish**.*

WHITEFISH COMMUNITY VALUES

- TAKE IT SLOW, ENJOY THE RIDE
- RECREATE RESPONSIBLY
- BE A STEWARD OF THE LAND
- SHOW RESPECT AND KINDNESS
- FUEL OUR LOCAL BUSINESSES



PROTECT OUR WINTERS PARTNERSHIP In 2022, Explore Whitefish and Whitefish Mountain Resort partnered with Protect Our Winters to raise awareness about climate change and empower people to protect our communities, lifestyles, and livelihoods from a warming planet. In honor of the 75th anniversary of Whitefish Mountain Resort, we created an 11-minute film that explores how climate change is affecting the resort and town we love.

WHITEFISH SKATEPARK The Whitefish Skatepark Association was nearing their fundraising goal for an expansion to the Dave Olseth Memorial Skatepark. Explore Whitefish stepped up with grant funding to help them meet their financial goal and move forward with the expansion, doubling the size of the park.



HOUSING WHITEFISH Explore Whitefish has worked closely with Housing Whitefish since its inception in 2021. The need for affordable housing for our community is stronger than ever so Explore Whitefish decided early on to award significant funding to Housing Whitefish allowing them to hire an executive director and focus on implementing projects and programs rather than just fundraising.

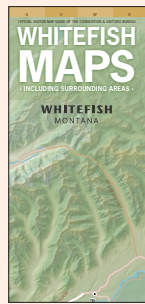
"With the funding from Explore Whitefish, we've been able to take really big leaps over our first two years as an organization."

— **Housing Whitefish Executive Director Daniel Sidder**

VISITOR INFORMATION

VISITOR INFORMATION FULFILLMENT

Key distribution points include downtown information kiosks, Glacier Park Int'l Airport, Whitefish Visitor Welcome Center, Whitefish Mountain Resort, regional visitor information centers, mailed via request form on explorewhitefish.com, and throughout our member businesses in Whitefish.



- ▶ **25,000** PRINTED TRAVEL GUIDES DISTRIBUTED
- ▶ **50,000** WAYFINDING MAPS DISTRIBUTED
- ▶ **2,564** DIGITAL TRAVEL GUIDE VIEWS
- ▶ **844** PRINTED TRAVEL GUIDES MAILED

(Stats for FY23 – July 2022-June 2023)

EXPLOREWHITEFISH.COM

380,484 sessions (+18.7% YOY)

372,858 new visitors (+15.3%)

51 sec/visit | **1.34** pgs./session

TOP FIVE PAGES: Home, Stay, Webcams, 5 Winter Adventures, Do

FACEBOOK

33,153 page likes (+13.1%)

720,590 Ave. Monthly Impressions

23,645 Avg. Monthly Engagements

INSTAGRAM

57,829 followers (+6.2%)

390,598 Ave. Monthly Impressions

16,280 Ave. Monthly Engagements

(Stats for FY23 – July 2022-June 2023)

PUBLIC RELATIONS

Annual Potential Reach for FY23:

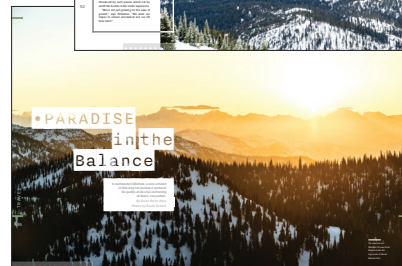
9,200,000,000

Annual Advertising Equivalency FY23:

\$85,200,000

(Source: Meltwater)

PR MEDIA HIGHLIGHTS:



– **US News & World Report**, “13 Top Ski Resorts in Montana”

– **Travel & Leisure**, “Whitefish, Montana, Is the Perfect All-seasons Destination — With Small-town Charm, Lakefront Lodges, and Mountain Views”

– **The New York Times**, “Faster Rides, Shorter Waits: New Ski Lifts Changing U.S. Slopes This Winter”

– **Conde Nast Traveler**, “The 28 Most Beautiful Towns in America”



A Legacy of Sustainable Tourism

After serving nine years as Explore Whitefish's executive director, Dylan Boyle is moving on to Bellingham to continue promoting business collaboration and sustainable tourism in Washington state.

– **Flathead Beacon**, “A Legacy of Sustainable Tourism”

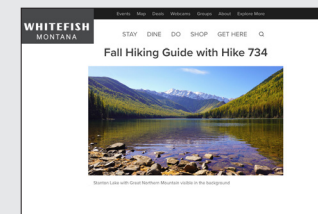
ADVERTISING

VISITOR EDUCATION CAMPAIGN: BE A FRIEND OF THE FISH

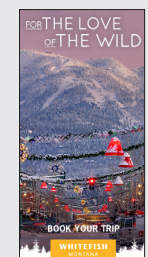
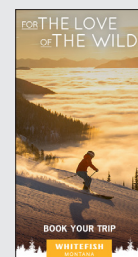


TRADITIONAL CAMPAIGNS: FOR THE LOVE OF THE WILD

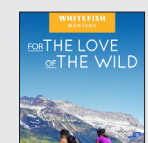
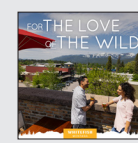
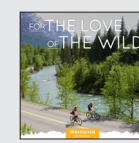
LARCH SEASON (FALL) Media Partnership with Hike734 to create custom hiking content.



WINTER Cooperative Media Partnership: Outside/SKI and Whitefish Mountain Resort



SECRET SEASON (SPRING) Social Media Campaign Featuring Spring Attractions





Grant Details

Grant: 23-51-040 - FY23 YELLOWSTONE COUNTRY DMO Plan - FY23

Status: Underway
Program Area: DOC Office of Tourism
Grantee Organization: Yellowstone Country Montana, Inc.
Program Officer: Barb Sanem
Awarded Amount: \$3,000,000.00

Narrative Evaluation

Yellowstone Country's methods for FY 23 included the following: Administration, Agency Services, Earned Media/Tourism Sales, Education/Outreach, Joint Ventures, Marketing Resources, Paid Media, Product Development, Research, Visitor Services and Website Development. Of the marketing methods included in our approved FY 23 DMO Plan, we identified the following objectives and metrics for evaluating and reporting.

Joint Ventures: Yes, Montana's Yellowstone Country met our metric of participating in 3 joint ventures and they were successful methods to focus on increasing/enhancing awareness of new or lesser known tourism experiences/products. We participated in JVs with Western Montana's Glacier Country, Visit Southeast Montana, Glaciers to Geysers and Brand MT. Additionally, we are participating in "Montana's Great Wide Open," a product development JV with Visit Southeast Montana, Montana's Missouri River Country and Central Montana. FY 23 saw the production phase kick off and launch of the product will be in March 2024.

Our JV with Western Montana's Glacier Country focused on increasing awareness of lesser-known tourism experiences, including winter and shoulder season experiences in the smaller communities north of Yellowstone National Park through a mix of paid social, print and digital promotion. We also participated in a joint venture with Visit Southeast Montana to promote bucket-list experiences like the Beartooth Highway to bring people back into the area following the historic flooding in Yellowstone National Park in June 2022.

Montana's Yellowstone Country also continued its successful partnership with Western Montana's Glacier Country in FY 23 through the award-winning "Glaciers to Geysers" joint venture with a redesigned and reprinted Glaciers to Geysers snowmobile guide, print advertising in targeted niche publications, and social media ads. These ads were billed in FY 23 but ran in the fall of 2023 to promote the less-busy fall shoulder season.

Montana's Yellowstone Country also opted into four joint ventures offered by Brand MT in FY 23: Sojern, Teads, Jun Group and Pinterest. The creative assets for the Brand MT joint ventures focused on the less-visited winter season activities in and north of the park in Montana's gateway communities.

Education/Outreach: Yes, our objective was met, and this was a successful method. At the time we implemented the FY 23 DMO Plan methods, the region was undergoing the Resiliency Strategic Planning process, so the YC BOD made the decision to combine our education/outreach efforts with the strategic planning process. We held 6 outreach & strategic planning sessions via zoom, and 1 in-person meeting in Gardiner. During these strategic planning meetings, a number of partnership opportunities were identified and discussed: long-term communications plan with partners, region-wide steering committee to work on resiliency and sustainability projects, and identifying potential community ambassadors across the region.

NOTE: Since we combined our education/outreach efforts with other meetings/projects, no FY 23 budget funds were used.

Visitor Services: No, we did not meet our objective of funding 11 VICs—we provided staffing grants for only 9 centers. However, this method was still successful, as 9 VICs did receive funding for the 2023 warm season. There were extenuating circumstances for why we did not fund the 11 VICs: Due to the terminal expansion construction, the VIC operation located at Bozeman Yellowstone International Airport was suspended for 2023-2024, and the Three Forks VIC was closed indefinitely due to location issues. These 9 VICs were funded for 2023 warm season: Big Sky, Big Timber (Sweet Grass County Chamber), Bozeman, Columbus (Stillwater County Chamber), Cooke City, Gardiner, Livingston, Red Lodge, and West Yellowstone.

No, we did not meet our metric, but our marketing methods were still successful. Comparing our Call Center data from FY 22, Yellowstone Country inquiries for FY 23 were down -8% when all inquiry methods and lead sources are compiled in a year-to-year comparison.

Our FY 23 plan had its warm season media budget reduced and delayed in anticipation of flood-related budget impacts. Other measures that were implemented after budget impacts were not as severe but they could not completely make up for the delayed warm season media outcome in terms of call center inquiries.

Several late FY 23 budget year strategies were placed in action that made up a significant amount of the inquiry deficit to the prior year.

Product Development: Yes, we met our objective to support a minimum of 3 attractions/events through our Cultural Tourism Grant Program. This was a successful method, as we actually exceeded our objective of funding a minimum of 3 events—we provided grant funding for 7 events across the region; 6 of the funded events reported growth over the previous year's attendance. One event was new for 2023; the coordinator reported their initial projected attendance goal was met. The events that received grant funding from Montana's Yellowstone Country are: The Montana Tour-Red Lodge Gravel Event, West Yellowstone Music in the Park Weekly Series, the Treasure State Cowboy Shooting Event-Red Lodge, the Big Sky Music in the Mountains Series, the Stillwater Run & Ride-Absarokee/Fishtail, the Red Lodge Home of Champions Rodeo and the Red Lodge Songwriters Festival.

Yes, we met our objective, as we funded 4 VIC Enhancement Projects. Ideally, we would have liked more of the nine eligible VICs to submit a project for funding. However, this project can be considered successful since our objective was met, and the 4 entities that received funding did complete their projects. The 4 VICs that participated in the Enhancement Program were:

- Red Lodge—exterior repair, prep and paint of the VIC building
- Visit Big Sky—upgraded existing assets: new computers, a baby changing table for the public bathroom, and painted the VIC bathrooms
- West Yellowstone—purchased new entrance doors for the VIC
- Livingston—installed new signage and garden boxes, landscaped the exterior grounds of the VIC

All Methods: We mostly met our metric of increased bed tax collections, and our marketing methods were successful. Our marketing methods resulted in increased bed tax collections that exceeded our goal of 2% increase in spring and fall over the same time periods in FY 22, but fell short in winter, when bed tax collections held steady year over year for the period of Jan. 1 to March 31.

Following the historic flooding in YNP in June 2022, we saw a dip in bed tax collections as Yellowstone National Park shut down briefly and roads into the park from our gateway communities were washed out and needed to be repaired and rebuilt.

Our quick shift to increase our marketing efforts in fall 2022 helped keep Yellowstone National Park and Montana's gateway communities north of the park top of mind for visitors as a tourism destination, helping to bring people back into the gateway communities and stabilize bed tax collections.

Earned Media: Yes, Montana's Yellowstone Country met its metric of hosting 3 influencers/travel writers on press trips focused on rural areas and our marketing methods were successful.

1) We hosted Melynda Harrison ("Traveling Mel MT") for two nights in the Cooke City/Gardiner area in February 2023 to promote travel to these two Montana Yellowstone National Park gateway communities during the less busy season of winter. Per our agreement with her, Mel wrote three blog posts for visityellowstonecountry.com, posted on Facebook and Instagram about her trip to encourage her audience to make the trip.

2) Jesse Coulter's itinerary focused on promoting family-friendly winter visitation in the Red Lodge area, which was still working to recover from the previous summer's flood impacts.

3) Sami Michie's hosted visit ("Montana Michie Adventures") focused on promoting the gateway communities of Gardiner and Cooke City-Silver Gate in the less-busy spring shoulder season.

No, we did not meet our metric of purchasing advertising in at least 8 community travel guides, but our marketing methods were still successful. Montana's Yellowstone Country continued its advertising in the following 2 region guidebooks: Visit Southeast Montana and Western Montana's Glacier Country, and the following three CVB guide books: Destination Missoula, Red Lodge and West Yellowstone. To work toward our ideal target of being in at least 8 of the guides, we added the purchase of advertising in the Visit Big Sky travel guide for FY 23. We did not place an ad in Montana's Missouri River Country travel guide because MRC doesn't include paid ads in its travel guide. We did not purchase an ad in Visit Southwest Montana's travel guide because SWMT travel guide ads are for in-region and partners only and there are only a few full-page ad spots available.

- Glacier Country Travel Guide Ad
- Visit Southeast Montana Travel Guide Advertorial Spread and Full-page Ad
- Destination Missoula Travel Guide Full-page Ad
- Red Lodge Travel Guide Ad
- Red Lodge Travel Guide Advertorial
- West Yellowstone Travel Guide Ad
- Visit Big Sky Travel Guide Full-page Ad

Yes, we met our metric of promoting a minimum of 10 community events on our social media channels, and our marketing methods were successful. As part of building awareness in our rural communities and draw people off the beaten path, Montana's Yellowstone Country utilized our weekly emails, blogs, and social media channels to promote specific events, as well as region-wide roundups of events such as rodeos, and holiday strolls that take place in most towns.

Blogs:

- Oktoberfest, Livingston
- Exploring Three Forks
- (Region-wide blogs)
- Fourth of July Celebrations
- Festivals
- Rodeos
- Fun Runs
- Farmers Markets
- Upcoming Events
- Holiday Strolls
- Social Media Promotion:
- Yellowstone Ski Festival, West Yellowstone
- Shane Center Summer Concert Series, Livingston
- Big Sky Haunted Peaks Festival, Big Sky
- Red Lodge Songwriter's Festival, Red Lodge

- Forget Me Knot Festival, Cooke City
- Yellowstone Harvest Festival, Livingston
- Wishberry Hollow, Livingston
- Christmas Convoy, Belgrade
- Montana's BBQ Cookoff, Absarokee
- Musician's Rendezvous, Columbus
- Music in the Park, West Yellowstone
- Belgrade Fall Festival, Belgrade
- Great Montana Sheep Drive, Reed Point

We promoted at least 10 community events on our social media channels:

1. Absarokee, Montana BBQ Cook-Off
2. Reed Point Sheep Drive
3. Gardiner, Annual Hell's-A-Roar' Horse Drive
4. Livingston, Winter Makers Market
5. Livingston, Light Up Livingston Celebration
6. West Yellowstone, Yellowstone Ski Festival
7. Big Sky, Haunted Peaks Halloween Festival
8. Big Timber, Weekly Rodeo
9. Red Lodge, Summer Fest
10. Gardiner, Yellowstone International Arts Festival



FY25 University Travel Research Programs

FY25 University Travel Research Program

The legislative appropriated dollars for the Travel Research Program for FY24 was \$1,364,134.00, with \$149,074.79 carried over. The proposed projects for FY25 are listed below, although appropriated FY25 funds may not be known until early/mid-2024. This budget was estimated based on the previous year's allocation and carryover. The Research Committee of the Tourism Advisory Council (TAC) recommends the ITRR research projects for each fiscal year. The following projects were brought forth to the TAC Research Committee for discussion and approval on September 29, 2023. The project scope and budgets are listed below for the January 25, 2024, TAC Research Committee meeting. This will then be brought to the full council's meeting on February 6, 2024.

Please consider that the costs associated with the research project are approximations and are subject to potential adjustments. Additionally, the scope and objectives of the research project are initially formulated through submissions and general discussions with submitters and the Research Committee. These scopes and objectives are subject to refinement and increased specificity following community and stakeholder listening sessions. This iterative process is aimed at ensuring that the research outcomes align effectively with the evolving needs of Montanans.

Research projects and costs for FY25:

<u>Budget</u>	<u>Operations</u>	<u>Salary/Benefits</u>	<u>Total</u>
1. Quarterly Nonresident Travel and Recreation Analysis	\$102,500.00	\$506,049.75	\$608,549.75
2. 2023 Economic Impacts and 2024 Outlook	\$6,400.00	\$65,919.60	\$72,319.60
3. Tourism and Recreation Monitoring	\$6,000.00	\$102,869.13	\$108,869.13
4. ITRR Data Mining	\$0.00	\$53,000.62	\$53,000.62
5. Emerging Issues	\$0.00	\$21,389.02	\$21,389.02
6. Survey Kits	\$3,000.00	\$10,952.64	\$13,952.64
7. Resident Attitudes	\$5,000.00	\$34,759.94	\$39,759.94
8. Data Visualization & Research Collaboration	\$15,000.00	\$184,209.47	\$199,209.47
9. Fiscal Year Projects	\$33,600.00	\$216,656.48	\$250,256.48
9a. Beyond Fossils: Investigating the Socioeconomic Footprint of Montana's Paleontological Tourism	\$5,040.00	\$32,498.47	\$37,538.47
9b. Beyond Artifacts: Unveiling the Contributions and Impacts of Montana Museums	\$6,720.00	\$43,331.30	\$50,051.30
9c. Understanding the Impact of Montana Meetings and Conventions	\$3,360.00	\$21,665.65	\$25,025.65
9d. Navigating Water Challenges: A Study of Flathead Lake Levels Impacts on the Tourism Economy	\$3,360.00	\$21,665.65	\$25,025.65
9e. Tool for Understanding Reservoir Recreation (Canyon Ferry Survey)	\$6,720.00	\$43,331.30	\$50,051.30
9f. Montana's Outfitting Industry: Economic Impact and Industry-Client Analysis	\$6,720.00	\$43,331.30	\$50,051.30
9g. Understanding Tourist Disengagement's Influence on Montana Tourism	\$1,680.00	\$10,832.82	\$12,512.82
Administration	\$90,200.00	\$76,540.30	\$166,740.30
Total	\$261,700.00	\$1,272,346.94	\$1,534,046.94
			-\$67,602.94
		Carry forward	\$ 149,074.79
		Total	\$ 81,471.85

**Operating includes supplies, travel, repairs, software, insurance, publications, communications, postage, printing, conferences, computers, contracted services, maintenance, subscriptions, background checks, and network charges.*

Quarterly Nonresident and Resident Visitor Analysis (Ongoing)

Introduction

In July 2009, ITRR began the nonresident visitor survey throughout the state. This ongoing, high-value project provides quarterly data, which is uploaded into the report builder for anyone to use for decision-making, presentations, and planning. It also provides the nonresident visitation numbers to Montana, spending data, and the economic impact of tourism on the state.

Purpose and Objectives

The main purposes of this project are to 1) assess nonresident visitor characteristics on an ongoing basis, 2) estimate nonresident visitor numbers quarterly, 3) estimate nonresident expenditures quarterly, and 4) provide quarterly data on the report builder for clients to profile the characteristics of any nonresident visitor segment. A secondary purpose of this project is to further assess or explore nonresident niche markets as the need for exploration presents itself. Finally, the purpose is to intercept residents (when nonresidents are unavailable) to ask custom questions that emerge as important tourism or recreation-related topics.

Objectives:

- Describe visitors to Montana in terms of demographics, trip characteristics, travel behavior, and expenditures in the state on a quarterly basis.
- Update information used in ITRR's model to estimate quarterly and annual visitation and economic impacts.
- Utilize existing survey personnel for niche market surveys and/or address travel research needs as they arise.
- To survey residents on emerging tourism and recreation-related topics (when nonresidents are not available to survey).

Methods

- 1) Front-end intercept survey: Nonresidents are intercepted at Montana's gas stations, rest areas, and airports. This portion of the nonresident survey asks basic questions about their trip, demographics, and spending on an iPad. When nonresidents are not available, the surveyor will intercept residents with different questions each quarter.
- 2) Mail-back or online survey: After nonresidents have been asked the questions on the above front-end intercept survey, they are provided a longer survey in a postage-paid envelope. They can choose to complete the printed version or access the survey online. This additional data includes activities, sites visited, routes driven, attractions to the state, information sources used, lodging type, and technology use.
- 3) Supplemental surveys: a methodology for niche markets or other research needs will either be on-site interviews, online surveys, or mail-back surveys.
- 4) Proportion counts: At a sample of Montana borders, which are utilized in ITRR's model for estimating nonresident visitation to the state, and six of the airports (Billings, Bozeman, Great Falls, Helena, Kalispell, and Missoula), surveyors will conduct sample counts of nonresident vehicles entering the state and nonresident visitors boarding planes at the airports.

Outcomes

- Quarterly data will be cleaned, coded, and uploaded to the ITRR website interactive data tool for use by the public to produce their own summaries regarding nonresidents to MT.
- The economic impact of nonresident visitation to MT is generated from this data set on an annual basis, while spending is estimated on a quarterly basis.
- Press releases and presentations will be part of the dissemination of the results.

Anticipated Timeframe: on-going

<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
\$102,500.00	\$506,049.75	\$608,549.75

2024 Economic Impacts and 2025 Outlook (Ongoing)

Purpose and Objectives

The purpose of the study is to estimate annual nonresident visitation to Montana, the economic impact of visitors to Montana, and project visitation for the year 2025. The objective is to disseminate this information widely among Montanans through Bureau of Business and Economic Research Economic Outlook Seminars in 8-10 Montana cities, the 2025 Outlook article, the Governor's Conference on Tourism, and various group events across the state.

Objectives:

- To estimate 2024 visitation through secondary data sources and ITRR nonresident data.
- To project 2025 tourism and recreation visitation numbers based on trend data, national projections, and indicator data from the state and region.
- To conduct the annual outlook survey for Montana tourism business owners.

Outcomes

The following information will be provided from this project:

1. The Tourism and Recreation Outlook 2025 will be presented with the Bureau of Business and Economic Research to 8-10 cities in Montana (Helena, Great Falls, Missoula, Billings, Bozeman, Butte, Kalispell, Sidney, and Miles City) and for other groups and conferences as requested.
2. The ITRR Travel Outlook article.
3. Initial economic and visitation data for 2023, crucial for the planning of tourism-related businesses and agencies, will be accessible in January 2024, with the finalized figures becoming available in late April 2024. The ITRR website will contain the newly updated information.

Anticipated Timeframe: On-going

<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
\$6,400.00	\$65,919.60	\$72,319.60

Tourism and Recreation Monitoring (Ongoing)

Purpose and Objectives

The purpose of this project is to provide travel, tourism, and recreation trend data to the public through website updates and email summaries. Information and data for this project are a combination of primary data collection, secondary data, and reports from other entities.

Objectives:

- Continually collect and update trend data on the ITRR interactive data web page to include skier visits, airport deboarding, -question resident attitude, nonresident visitation, nonresident expenditures, nonresident expenditures by location, National Park Service visitation, and the 4% bed tax revenues.
- Disseminate travel data and research from reliable companies, e.g., USTA, U.S. Dept. of Commerce, Bureau of Economic Analysis (BEA) Outdoor Recreation Statistics, etc.
- To collect, summarize, and distribute regional and national tourism research information to Montana CVBs, travel regions, and the MT Office of Tourism as it becomes available.
- Continue work with Parks and Outdoor Recreation Division (previously State Parks and Fishing Access Sites), including primary data collection and monitoring of visitation numbers and trends.

Outcomes

1. The interactive web page will be upgraded as needed, and new trend data sets will be updated annually, quarterly, or monthly, depending on the data type.
2. As new data becomes available, press releases will be written and disseminated around the state through the University of Montana news media and ITRR social media channels.
3. TAC, Montana Office of Tourism and Business Development, regions, and CVBs will receive updates on travel trends in the region, nation, and internationally.

Anticipated Timeframe: On-going

Operating
\$6,000.00

Salary/ Benefits
\$102,869.13

Total
\$108,869.13

ITRR Data Mining (Ongoing)

Purpose

This project will allow ITRR to mine data sets, including the nonresident data set, when it is not possible to extract information through the interactive web page. When questions arise that cannot be answered with the interactive report builder on the website or through previous niche news and reports, ITRR staff will generate the report if the sample size is adequate and if the request is useful beyond an individual's use.

Yearly reports generated:

- **Economic impacts on counties and regions**
- **Spending of airline travelers by MT airport**

Optional Reports or per request:

- **Major attraction analysis:** These reports use survey data in the "main attraction" category to provide the zone of influence of these attractions. This includes everything from landscape to historic features, parks, and some activities.
- **Niche activity analysis:** Depending on the needs of stakeholders and others, this could be one or numerous reports to look more specifically at activities.

Methods

Data will be extracted from the available data sets and analyzed by the chosen topic. Where appropriate, correlations and multivariate analysis will be conducted on data to provide further insights into the Montana traveler.

Outcomes

1. Reports on the results will be written as needed.
2. Journal articles will be written and submitted for publication.
3. Presentations on data findings will be provided at conferences and meetings.

Anticipated Timeframe: On-going

Operating
\$0.00

Salary/ Benefits
\$53,000.62

Total
\$53,000.62

Survey Kits (Ongoing)

Purpose and Objectives

The purpose of the survey kit is to assist communities, organizations, or event managers in understanding their visitors in terms of characteristics, satisfaction, and spending.

Methods

Survey collection methods are determined by the type of event to be researched. The methods range from email surveys to intercept surveys.

Outcomes

1. Typically, an annual range of 4 to 7 survey kits are administered.
2. A report is written for the community or organization describing the visitor characteristics, satisfaction with the event, and spending by visitors.
3. If a total count of participants is obtained, the total dollar contribution of the event can be assessed.

Anticipated Timeframe: on-going

Operating
\$3,000.00

Salary/ benefits
\$10,952.64

Total
\$13,952.64

Beyond Fossils: Investigating the Socioeconomic Footprint of Montana's Paleontological Tourism (One-time)

Introduction

Dinosaurs may be Montana's oldest tourist attraction and drive folks to rural areas of the state. Spanning across Montana, the Montana Dinosaur statewide trail encompasses 14 locations, stretching from the Montana Dinosaur Center in Bynum to the Carter County Museum in Ekalaka. Visitors frequently plan vacations around dinosaur-themed locations, leading to increased museum attendance and attraction visitation across communities. Despite this trend, there is a lack of a comprehensive statewide study to understand visitation patterns and economic impacts associated with dinosaur-related tourism. This research aims to thoroughly investigate Montana Dinosaur Trail & Paleo Tourism, delving into its effects on local economies, community development, and visitor experiences.

[Welcome to the Montana Dinosaur Trail! \(mtdinotrail.org\)](http://mtdinotrail.org)

Purpose

This research aims to provide an in-depth understanding of how the Montana Dinosaur Trail & Paleo Tourism contributes to local economies, community development, and visitor experiences.

Research Questions

- **Demographic Data Collection:**
 - Gather information on demographics, including age, the number of individuals in the traveling party, departure points, and specific destination locations.
- **Travel Behavior & Preferences:**
 - Is the trip planned around a specific museum?
 - What motivates travel during this time of the year, and what is the preferred month for travel?
 - Identify resources used for planning the route, both in advance and on the road.
 - Determine the routes taken through Montana and assess willingness to explore alternative routes with provided information.
 - Investigate lodging preferences, including type and desired amenities or services.
 - Explore dining preferences, including the type of food and beverage, and desired amenities or services in food, beverage, retail, or entertainment experiences.
 - Understand the type of information desired for planning a return visit to Montana.
- **Community and Economic Impact Assessment:**
 - Evaluate the impacts on communities, including development and economic effects, arising from travel to Dinosaur museums in Montana.
 - Compile estimated visitor numbers from all museums.

Methods

This study will employ various research methods.

1. Mine data from ITRR nonresident visitor intercepts for visitor profiles.
2. Purchase stickers (Montana Dinosaur logo) with a QR code on the back to take an online survey about experiences.
3. QR Code postcards and posters at museum locations with a link to the online survey.
4. Post-event survey distribution across the state with museum partners.
5. Online survey and administered to a survey panel.

Outcomes

The research outcomes from visitors to Montana's paleontological sites will be compiled into a report for utilization by dinosaur museums, CVBs, regional entities, and other supporting organizations. The recommendations will offer valuable insights to museums, providing decision-making support and essential data. Understanding the needs and behaviors of paleontology tourists will be crucial in customizing promotional efforts aimed specifically at attracting this group to Montana. Information dissemination will encompass reports, press releases, presentations, and website updates.

Anticipated Timeframe: May 2024-April 2025

<u>Operating</u>	<u>Salary/ benefits</u>	<u>Total*</u>
\$5,040.00	\$32,498.47	\$37,538.47

Beyond Artifacts: Unveiling the Contributions and Impacts of Montana Museums (One-time)

Introduction

Montana boasts a rich tapestry of hundreds of museums, each intricately weaving narratives of the state's history, culture, and art. Serving as foundational elements of Montana's tourism, these cultural and heritage attractions bring millions of visitors annually, representing diverse backgrounds and regions across the country. Ensuring the preservation, care, and ongoing development of these cultural assets is imperative. Equally important is the commitment to providing visitors with enduring value for their investment and delivering a high-quality and enriching experience.

[Museums \(visitmt.com\)](https://visitmt.com)

[List of museums in Montana - Wikipedia](#)

[Museums Association of Montana - Home \(montanamuseums.org\)](https://montanamuseums.org)

[Measuring the Social Impact of Museums – American Alliance of Museums \(aam-us.org\)](https://aam-us.org)

[Measuring-the-impact-of-museums-on-their-communities-The-role-of-the-21st-century-museum.pdf \(researchgate.net\)](#)

[Handbook of Industry Studies and Economic Geography - Google Books](#)

[Museum Management and Marketing - Google Books](#)

Purpose

This study seeks to investigate the evolution of museums, encompassing their social, educational, and economic impacts, as well as their strategies for community engagement. Moreover, the study could expand to include the Measurement of Museum Social Impact ([MOMSI](#)) to understand the multifaceted and beneficial outcomes for individual visitors and their broader impact on communities, from exploring identity-related motivations for museum visits to understanding the overall influence on individuals and neighborhoods.

Research Questions:

1. How have museums evolved in terms of their social roles and engagements within communities over recent years?
2. What educational impacts do museums have on visitors, and how have these impacts changed or adapted to contemporary needs?
3. In what ways do museums contribute to the economic landscape of their operational environments and the broader community?
4. How do museums currently engage with their local communities, and what strategies do they employ for effective community involvement?
5. What challenges do museums face in showcasing and quantifying their impact within communities, and how do they address these challenges?
6. What role does effective community engagement play in ensuring the sustained support and funding of museums, and how do museums navigate these relationships?
7. How have museums adapted their strategies to align with expectations for demonstrating their significance and relevance within local communities?
8. In what ways can museums enhance their impact and value proposition to better meet the expectations of local communities and secure continued support?

Methods

This study will be conducted by creating an online and mailback survey to distribute to Montana museums and visitors.

Outcomes

The analysis will be written into a report to be used by all museums, MT CVBs, regions, supporting agencies, and other promotional entities. Reports, press releases, presentations, and website updates will all be part of the information dissemination.

Anticipated Timeframe: July 2024-July 2025

Operating
\$6,720.00

Salary/ benefits
\$43,331.30

Total*
\$50,051.30

Understanding the Impact of Montana Meetings and Conventions (One-time)

Introduction

The resurgence of meeting and convention tourism is evident as the pandemic recedes. However, in Montana, there has been a notable absence of successful studies comprehensively exploring the characteristics of statewide conventions and their economic impacts.

["Economic Impact of Convention and Meetings to Montana: Methodological " by Rita J. Black and Paul L. Grant \(umt.edu\)](#)

Purpose:

This research aims to fill a critical gap by conducting a comprehensive study on meetings and conventions in Montana.

Objectives:

- **Estimate Economic Impact:**
 - Assess the economic impact of conventions on local communities and the overall state of Montana. This includes analyzing spending patterns, job creation, and other economic contributions attributed to hosting conventions.
- **Motivation Analysis:**
 - Examine the motivations influencing the selection of Montana as a convention site. Understand the factors that attract event organizers to the state and contribute to its appeal as a host destination.
- **Conventions Quantification:**
 - Estimate the number and size of conventions held throughout the state. This involves identifying key locations, venues, and sectors that frequently host such events and understanding their scale and frequency.
- **Comparison with National Statistics:**
 - Compare Montana's convention statistics with national benchmarks. Evaluate how the state's meetings and conventions landscape aligns with or differs from broader national trends, providing valuable insights into its unique characteristics.

Methods

This study will be conducted by creating an online and mailback survey to distribute to venues and meeting planners across the state.

**Limitations noted in 1997 study: Outlines the attempt to replicate a study in Montana originally conducted nationally. The study was not completed because of an inability to obtain cooperation from the conference associations and hotel properties. This report explains the methodology and the difficulties encountered during the study attempt.*

Outcomes

The analysis will be written into a report to be used by all meeting and convention organizations, MT CVBs, regions, supporting agencies, and other promotional entities. Reports, press releases, presentations, and website updates will all be part of the information dissemination.

<u>Operating</u>	<u>Salary/ benefits</u>	<u>Total*</u>
\$3,360.00	\$21,665.65	\$25,025.65

Navigating Water Challenges: A Study of Flathead Lake Levels Impacts on the Tourism Economy

Introduction

During the summer of 2023, Flathead Lake experienced historically low water levels, attributed to diminished streamflow in northwest Montana following a season of inadequate snowfall and rapid spring runoff. This decline occurred approximately a month earlier than the usual schedule, sparking conflicts among stakeholders regarding the cause and potential solutions. The scarcity of water, however, stemmed from both drought conditions and the changing climate. Boats were removed from the lake earlier than usual, impacting recreational activities, and, anecdotally, tourism saw a decline. The issue of low water levels has sparked concerns as water is utilized for both hydropower and recreation,

creating conflicts upstream. At the same time, downstream, reduced flows adversely affect native fish populations and farmers.

[Shrinking Flathead Lake stresses tourism, energy production \(kpax.com\)](#)
[Following 'Covid Bubble' Burst, Tourism Demand Returns to Pre-pandemic Levels - Flathead Beacon](#)
[Flathead Lake at precarious level as drought comes to northwest Montana \(montanafreepress.org\)](#)

Purpose

The aim of this research is to investigate the influence of lake levels on the operations of tourism and recreation businesses in the summer of 2023.

Objectives

- Examine how historically low water levels at Flathead Lake during the summer of 2023 affected the operations and economic performance of tourism and recreation businesses.
- Assess the consequences of early boat removal and reduced water levels on recreational activities at Flathead Lake. Analyze the patterns of visitor behavior and the overall impact on tourism.
- Quantify the decline in tourism at Flathead Lake during the studied period and assess the economic ramifications for local businesses, including the tourism and recreation sectors.

Methods

This study will be conducted by creating an online and mailback survey to recreation and tourism businesses in the surrounding communities of Flathead Lake.

Outcomes

The analysis will be written into a report to be used by communities, MT CVBs, regions, supporting agencies, and other promotional entities. Reports, press releases, presentations, and website updates will all be part of the information dissemination.

<u>Operating</u>	<u>Salary/ benefits</u>	<u>Total*</u>
\$3,360.00	\$21,665.65	\$25,025.65

Tool for Understanding Reservoir Recreation (Canyon Ferry Survey)

Introduction

Canyon Ferry is one of Montana's foremost recreation areas because of its proximity to Helena, Great Falls and Butte, as well as a destination between Yellowstone and Glacier for the RVer. The reservoir covers 25 miles and there are 24 Bureau of Reclamation maintained recreation sites around the reservoir. There is east access to the reservoir from US Highway 12 east of Helena or just north of Townsend. Canyon Ferry offers a variety of recreational opportunities, including boating, year-round fishing for trout and walleye, camping, sightseeing, picnicking, hunting, waterskiing, nature study, and swimming. Boat access is available at all the campsites. Several additional public boat launch areas are located near the dam on the north end and near Townsend on the south end. Canyon Ferry has seen an increase in visitation and, as a result, overcrowding, trash, misuse, and user conflicts.

["Canyon Ferry Recreation Survey: 2003-2004" by Robert Dvorak, Norma P. Nickerson et al. \(umt.edu\)](#)

Purpose

The overall purpose of the Canyon Ferry Recreation Study is to understand the characteristics of recreational use and users at representative sites on Canyon Ferry reservoir and to compare the summer information to results from the 2002/2003 and 1995 and 1999 Canyon Ferry studies to examine recreation trends. In addition, this survey tool for understanding reservoir-based recreation can be used by other stakeholders and managers in the state.

Objectives

- determine socio-demographic characteristics of on-site users.
- determine on-site activity participation.
- determine levels of overall trip satisfaction, satisfaction of existing facilities, settings and management, and identification of needed facilities.
- identify potential/existing conflicts among user groups and where they occur.
- explore attachment to place and “sense of place” and how it may explain existing/potential use patterns.
- investigate potential changes in visitation patterns due to resource/social changes at sites (e.g., crowding, resource degradation, conflict).
- look at visitation at selected sites.
- determine expenditure patterns.
- compare results to past ITRR Canyon Ferry Studies.

Methods

This study will be conducted by replicating past ITRR studies and administering surveys to visitors at the Canyon Ferry recreation sites using randomized sampling techniques.

Outcomes

The analysis will be written into a report to be used by communities, MT CVBs, regions, supporting agencies, and other promotional entities. Reports, press releases, presentations, and website updates will all be part of the information dissemination.

<u>Operating</u>	<u>Salary/ benefits</u>	<u>Total*</u>
\$6,720.00	\$43,331.30	\$50,051.30

Montana's Outfitting Industry: Economic Impact and Industry-Client Analysis

Introduction

According to the ITTR 2018 Outfitting report, 5.4% of all visitors that had a guided or outfitted experience spent a total of \$791 million dollars, while in Montana, accounting for nearly a quarter of all visitor spending. Spending by visitor groups taking part in outfitted or guided experiences generates more than 16,000 jobs and nearly \$1.3 billion in economic output. In recent years, nonresident visitor spending on outfitters and guides has surpassed that of spending on retail goods, making it the fourth highest spending category behind only fuel, lodging, and dining out. This rise comes despite only five to six percent of the visiting population taking part in these activities. This observation reiterates findings from the 2007 & 2017 Montana Outfitter and Guide study characterizing the outfitting industry as high value, low impact.

[Montana Outfitters and Guides Association](#)

["Montana's Outfitting Industry - 2017 Economic Contribution and Industr" by Jeremy L. Sage, Carter Bermingham et al. \(umt.edu\)](#)

["Montana's Outfitting Industry: Economic Impact and Industry-Client Ana" by Norma P. Nickerson, Christine Oschell et al. \(umt.edu\)](#)

Purpose

The purpose of this study is to assess the current structure of the outfitting and guiding industry through an analysis of 1) the economic contribution of nonresident client expenditures, 2) industry supply and diversity of outfitted and guided experiences, and 3) a thorough characterization of the attributes of both the clients and outfitters within the industry, updating the 2006 and 2017 ITRR reports.

Objectives:

- To estimate the number of outfitters and guides working in the state of Montana across all outdoor recreation activities.
- To inventory the number, type, and duration of trips provided by outfitters and guides.
- To identify client demographics and outfitted trip characteristics.
- To estimate the economic contribution of the Montana outfitting/guiding industry on Montana’s economy.
- To compare similarities and differences between the 2006, 2017, and 2023 outfitting industry and clients in Montana.

Methods

This study will be conducted by creating an online and mailback survey to distribute two primary data sources; the first is based on a survey of outfitting and guiding businesses, and the other draws from nonresident visitors who indicated they hired an outfitter or guide during their Montana visit as well as working with guides to share with their clients.

Outcomes

The analysis will be written into a report to be used by the outfitting industry, public and private landowners, organizations, MT CVBs, regions, supporting agencies, and other promotional entities. Reports, press releases, presentations, and website updates will all be part of the information dissemination.

<u>Operating</u>	<u>Salary/ benefits</u>	<u>Total*</u>
\$6,720.00	\$43,331.30	\$50,051.30

Understanding Tourist’s Disengagement Influence on Montana Tourism

Introduction

Understanding the reasons behind tourists opting not to visit a location or reconsidering a revisit after a trip can assist in shaping a location’s image, marketing, and services. Several studies indicate that if customers exhibit behaviors indicative of future non-visitation, it can result in the dissemination of negative experiences, potentially tarnishing the reputation of service providers like hotels and restaurants. Such behaviors wield a significant influence on the future marketing efforts of locations and businesses. Therefore, identifying the reasons for visitor disengagement can enhance the quality of experiences and services. Communities and businesses can proactively implement actions based on this understanding, to change the tourism experience or better align visitor expectations.

[Why Customers Don’t Revisit in Tourism and Hospitality Industry? | IEEE Journals & Magazine | IEEE Xplore](#)

Purpose

The purpose of this research is to understand the dynamics of tourist disengagement within the context of Montana's tourism industry, aiming to comprehend the reasons behind tourists opting not to visit or reconsidering a revisit after a trip.

Objectives

- Identify and analyze the key factors contributing to tourist disengagement in Montana, exploring aspects such as negative experiences, dissatisfaction, and unmet expectations.
- Investigate the extent to which customer behaviors linked to non-visitation affect the future marketing strategies and efforts of locations and businesses within Montana's tourism sector.

Methods

This study will be conducted by purchasing a panel of one-time visitors as well as interviewing people who have never visited Montana for their perceptions.

Outcomes

The analysis will be written into a report to be used by communities, MT CVBs, regions, supporting agencies, and other partners. Reports, press releases, presentations, and website updates will all be part of the information dissemination.

<u>Operating</u>	<u>Salary/ benefits</u>	<u>Total*</u>
\$1,680.00	\$10,832.82	\$12,512.82

Travel Research Program Projects FY05-FY24

FY24			
	<u>Operations</u>	<u>Salary/Benefits</u>	<u>Total</u>
1. Quarterly Nonresident Travel and Recreation Analysis	\$100,500.00	\$476,061.46	\$576,561.46
2. 2022 Economic Impacts and 2024 Outlook	\$6,400.00	\$55,898.16	\$62,298.16
3. Tourism and Recreation Monitoring	\$6,000.00	\$93,616.46	\$99,616.46
4. ITRR Data Mining	\$0.00	\$42,718.70	\$42,718.70
5. Emerging Issues	\$0.00	\$59,490.30	\$59,490.30
6. Survey Kits	\$0.00	\$9,472.03	\$9,472.03
7. Resident Attitudes	\$5,000.00	\$29,611.52	\$34,611.52
8. Data Visualization & Research Collaboration	\$13,000.00	\$174,830.18	\$187,830.18
9. Economic, Social, and Infrastructure Impact Tool	\$25,600.00	\$110,234.21	\$135,834.21
9.a Yellowstone Natural Disaster and Tourism Impacts and Recovery	\$6,400.00	\$22,046.84	\$28,446.84
9.b The Ever-Changing Dynamics of Short Term Rentals in Montana	\$1,280.00	\$16,535.13	\$17,815.13
9.c Montana Dark Skies: Understanding the Stargazing Visitor	\$7,680.00	\$27,558.55	\$35,238.55
9.d Uncovering the Eastern Montana Visitor	\$0.00	\$11,023.42	\$11,023.42
9.e Montana Agritourism and Recreation Business Administration	\$10,240.00	\$33,070.26	\$43,310.26
	<u>\$34,550.00</u>	<u>\$62,965.86</u>	<u>\$97,515.86</u>
Total	\$191,050.00	\$1,114,898.87	\$1,305,948.87

FY23			
	<u>Operations</u>	<u>Salary/Benefits</u>	<u>Total</u>
1. Quarterly Nonresident Travel and Recreation Analysis	\$104,175	\$444,400.74	\$548,576
2. 2022 Economic Impacts and 2024 Outlook	\$5,400	\$55,898.16	\$61,298
3. Tourism and Recreation Monitoring	\$1,000	\$93,616.46	\$94,616
4. ITRR Data Mining	\$0	\$42,718.70	\$42,719
5. Emerging Issues	\$0	\$59,490.30	\$59,490
6. Survey Kits	\$0	\$9,472.03	\$9,472
7. Resident Attitudes	\$1,000	\$29,611.52	\$30,612
8. Data Visualization & Research Collaboration	\$8,000	\$165,784.25	\$173,784
9. Economic, Social, and Infrastructure Impact Tool	\$43,300	\$105,711.25	\$149,011
9.a Trail & Facility Use (2 sites)	\$6,186	\$15,102	\$21,287
9.b Economic and Infrastructure Impacts of events (4 sites)	\$12,371	\$30,203	\$42,575
9.c Economic Impact of Museums (2 sites)	\$6,186	\$15,102	\$21,287
9.d Dispersed Winter Activities (2 sites)	\$6,186	\$15,102	\$21,287
9.e Paleontology Impacts (2 sites)	\$6,186	\$15,102	\$21,287
9.f Indian Country Tourism Research (2 sites)	\$6,186	\$15,102	\$21,287
Administration	<u>\$33,200</u>	<u>\$ 64,065.86</u>	<u>\$97,266</u>
Total	\$196,075	\$1,070,769	\$1,266,844

FY22

	<u>Operations</u>	<u>Salary/Benefits</u>	<u>Total</u>
1. Quarterly Nonresident Travel and Recreation Analysis	\$88,005	\$311,753	\$399,758
2. 2021 Economic Impacts and 2022 Outlook	\$4,700	\$35,983	\$40,683
3. Tourism and Recreation Monitoring	\$1,695	\$47,166	\$48,861
4. ITRR Data Mining	\$0	\$30,537	\$30,537
5. Emerging Issues	\$300	\$37,191	\$37,191
6. Survey Kits	\$0	\$8,128	\$8,128
7. Resident Attitudes	\$500	\$17,685	\$18,185
8. Data Visualization & Research Collaboration	\$0	\$56,832	\$56,832
9. Understanding the New Visitor	\$2,000	\$10,919	\$12,919
10. Understanding Public Land Uses and Abuses	\$2,000	\$10,919	\$12,919
Administration	\$22,755	\$61,429	\$84,184
Total	\$121,955	\$628,542	\$750,497

FY21

	<u>Operations</u>	<u>Salary/Benefits</u>	<u>Total</u>
1. Quarterly Nonresident Travel and Recreation Analysis	\$106,124	\$447,899	\$554,023
2. 2020 Economic Impacts and 2021 Outlook	\$4,700	\$38,177	\$42,877
3. Tourism and Recreation Monitoring	\$5,495	\$68,605	\$74,100
4. ITRR Data Mining	\$0	\$31,957	\$31,957
5. Emerging Issues	\$300	\$25,772	\$26,072
6. Survey Kits	\$2,000	\$8,316	\$10,316
7. Air Service Impacts	\$9,400	\$30,785	\$40,185
8. Negative/Positive Press/Social Media Impacts on Traveler	\$4,000	\$40,995	\$44,995
9. Impact and Usage of Short-term Rentals in Montana	\$2,000	\$21,474	\$23,474
10. Visitor Use Monitoring–Assessing River/State Park Use	\$3,200	\$56,502	\$59,702
11. Projected Impact of Visitation Caps in Glacier NP	\$4,000	\$25,070	\$29,070
12. Bicycling in MT: Supply-Side Review & Demand Profile	\$3,360	\$45,492	\$48,852
13. Residents' Attitudes toward Tourism and Impact/ Challenge to Community Character	\$4,845	\$17,142	\$21,987
14. Impact of Music Festivals and Concerts	\$5,000	\$22,371	\$27,371
15. Analysis of Montana Museum Visitors	\$1,400	\$23,555	\$24,955
16. Administration	\$21,255	\$68,194	\$89,449
Total	\$177,079	\$972,305	\$1,149,384

FY20

	<u>Operating</u>	<u>Salary/benefit</u>	<u>Total</u>
1. Quarterly Nonresident Travel and Recreation Analysis	\$90,325	\$433,588	\$523,913
2. 2019 Economic Impacts and 2020 Outlook	\$4,700	\$58,453	\$63,153
3. Tourism and Recreation Monitoring	\$11,100	\$18,256	\$29,356
4. ITRR Data Mining	\$0	\$50,915	\$50,915
5. Survey Kits	\$0	\$14,384	\$14,384
6. Emerging Issues	\$0	\$23,318	\$23,318

7. ITRR Interactive Website Upgrade	\$8,950	\$112,270	\$121,220
8. Eastern Montana data growth	\$900	\$30,365	\$31,265
9. Canadian Traveler Analysis	\$500	\$23,318	\$23,818
Administration	<u>\$18,300</u>	<u>\$67,349</u>	<u>\$85,649</u>
Total	\$134,775	\$832,215	\$966,990

FY19

<u>On-Going Projects</u>	<u>Operating</u>	<u>Salary/ Benefits</u>	<u>Total</u>
1. Quarterly Nonresident and Resident Travel and Recreation Analysis	\$90,325	\$356,315	\$446,640
2. 2018 Economic Impacts and 2019 Outlook	\$5,200	\$65,665	\$70,865
3. Tourism and Recreation Monitoring	\$10,300	\$26,620	\$36,920
4. ITRR Data Mining (includes transportation zone of influence/attractions)	\$500	\$40,820	\$41,320
5. Panel Studies	\$1,025	\$21,160	\$22,185
6. Survey Kits	\$0	\$13,430	\$13,430
7. Emerging Issues	\$0	\$8,330	\$8,330
<u>One-Time Projects</u>			
1. What are repeat visitors looking for on a return trip?	\$0	\$9,080	\$9,080
3. Indian Country cultural and heritage tourism	\$4,225	\$29,260	\$33,485
4. Economics and characteristics of alpine skiing in MT**	\$11,500	\$17,540	\$29,040
7. Motorcycle touring	\$0	\$18,165	\$18,165
8. Using tourism to recruit new business	\$7,000	\$19,660	\$26,660
10. Tourism's impact on rural communities	\$500	\$6,660	\$7,160
11. Community tourism development case study – Gardiner (after development)	\$8,600	\$18,160	\$26,760
Administration	<u>\$14,500</u>	<u>\$53,460</u>	<u>\$67,960</u>
Total	\$153,675	\$704,325	\$858,000

FY18

	<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
1. Quarterly Nonresident Visitor Analysis	\$74,420	\$304,829	\$379,249
2. 2017 Economic Impacts and 2022 Outlook	\$4,900	\$60,629	\$65,529
3. Tourism and Recreation Monitoring	\$10,795	\$17,866	\$28,661
4. ITRR Data Mining	\$0	\$17,866	\$17,866
5. Panel Studies	\$1,000	\$10,964	\$11,964
6. Survey kits	\$0	\$6,414	\$6,414
7. Resident Travel in Montana	\$12,500	\$56,811	\$69,311
8. Montana Tourism Forecasting and Trends	\$2,000	\$65,938	\$67,938
9. Montana's Outfitter and Guide Industry: Businesses and Clients	\$5,500	\$33,479	\$38,979
10. Impact and Characteristics of Mountain Biking: Helena Case Study	\$1,600	\$34,350	\$35,950
Administration	\$20,880	\$28,958	\$49,838
Total	\$133,595	\$638,104	\$771,699

FY17

	<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
Quarterly Nonresident Visitor Analysis	\$85,700	\$329,218	\$414,918
2016 Economic Impacts and 2017 Outlook	\$7,800	\$49,502	\$57,302
Tourism and Recreation Monitoring	\$11,000	\$38,834	\$49,834
Data Mining of ITRR data sets	\$0	\$18,677	\$18,677
Panel Studies	\$0	\$25,396	\$25,396
Survey kit	\$500	\$8,400	\$8,900
Resident Travel in Montana	\$4,052	\$36,064	\$40,116
Visitor Characteristics and Economic Analysis of Northeast Montana	\$8,405	\$43,268	\$51,673
Montana's Key Niche Activities for Visitation & Spending	\$500	\$25,396	\$25,896
Administration	\$25,170	\$52,078	\$77,248
Total	\$143,127	\$626,835	\$769,962

FY16

	<u>Operations*</u>	<u>Salary/benefits</u>	<u>Total</u>
Quarterly Nonresident Visitor Analysis	\$88,600	\$348,747	\$437,347
2016 Outlook and 2015 Economic Impacts	\$7,850	\$44,240	\$52,090
Monitoring of Tourism & Recreation in MT	\$8,700	\$13,225	\$21,925
Data Mining of ITRR data sets	\$0	\$16,951	\$16,951
Panel studies	\$26,500	\$16,951	\$43,451
Survey kits	\$2,250	\$6,124	\$8,374
Assessing Character of Place to Guide Geotourism and the Main Street Montana Project: A case study of two communities	\$3,130	\$26,924	\$30,054
Testing the impacts of Glacier Park bicycling on statewide tourism – current and future projections	\$2,250	\$26,924	\$29,174
Trends and Community Benefits of Tourism as Assessed through an Analysis of Resort Tax Collections and Usage	\$0	\$27,289	\$27,289
Administration	<u>\$20,822</u>	<u>\$38,002</u>	<u>\$58,824</u>
Total	\$160,102	\$565,377	\$725,479

FY15

	<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
Quarterly Nonresident Visitor Analysis	\$92,382	\$308,407	\$400,789
2015 Outlook and 2014 Economic Impacts	\$8,243	\$32,340	\$40,583
Monitoring of Tourism & Recreation in MT	\$1,173	\$12,379	\$13,552
Economic impacts on Counties and Regions	\$5,865	\$28,549	\$34,414
Data Mining of ITRR data sets	\$2,765	\$19,961	\$22,726
Panel studies	\$22,765	\$25,693	\$48,458
Resource Library	\$0	\$22,360	\$22,360
Administration	<u>\$5,276</u>	<u>\$47,242</u>	<u>\$52,517</u>
Total	\$138,469	\$496,931	\$635,400

FY14

	<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
2013 Economic Impacts and 2014 Outlook	\$7,000	\$46,839	\$53,839
Tourism and Recreation Monitoring	\$10,200	\$45,338	\$55,538
Data Mining of ITRR data sets	\$0	\$22,428	\$22,428
Quarterly Nonresident Visitor Analysis	\$90,200	\$364,375	\$454,575
Characteristics of Bicycle Tourism	\$0	\$9,668	\$9,668
Community Tourism Development Case Study – Before and After	\$9,500	\$29,097	\$38,597
Panel Studies	\$16,500	\$38,280	\$54,780
Survey kit	\$150	\$6,380	\$6,530
Administration	<u>\$16,702</u>	<u>\$54,804</u>	<u>\$71,506</u>
Total	\$150,252	\$596,914	\$767,461

FY13

	<u>Operating</u>	<u>Salary/ Benefits</u>	<u>Total</u>
Approved			
2012 Economic Impacts and 2013 Outlook	\$400	\$38,510	\$38,910
Tourism and Recreation Monitoring	\$16,800	\$20,370	\$37,170
Data Mining of ITRR data sets	\$0	\$30,000	\$30,000
Quarterly Nonresident Visitor Study	\$79,000	\$162,500	\$241,500
MT tourism job analysis	\$8,000	\$48,200	\$56,200
Economic impact of the Beartooth Highway*	\$52,330	\$86,875	\$139,205
Connection between wildlands and nonresident visitors	\$0	\$10,435	\$10,435
Economic impact by counties	\$3,000	\$11,300	\$14,300
Case studies: impact of small town hotels on rural MT	<u>\$5,940</u>	<u>\$41,200</u>	<u>\$47,140</u>
Total Projects	\$165,470	\$449,390	\$614,860
Administration	<u>\$24,430</u>	<u>\$18,140</u>	<u>\$42,570</u>
Total Project and Admin. Budget	\$189,900	\$467,430	\$657,430

*\$50,000 approved by TAC. Remaining provided by Friends of the Beartooth

FY12

	<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
2011 Economic Impacts and 2012 Outlook	\$400	\$33,380	\$33,780
Monitoring Tourism and Recreation	\$14,050	\$18,640	\$32,690
Data Mining of ITRR data sets	\$0	\$31,610	\$31,610
Quarterly Nonresident Visitor Analysis	\$53,375	\$175,540	\$228,915
Geotourists in shoulder and winter seasons	\$0	\$14,760	\$14,760
Geotourism mapguides – do they work?	\$1,000	\$23,000	\$24,000
Resident in-state vacation characteristics	\$3,875	\$38,300	\$42,175
Why do Nonresidents fly into airports outside of Montana?	\$0	\$10,900	\$10,900
Total Projects	<u>\$72,700</u>	<u>\$346,130</u>	<u>\$418,830</u>
Administration	\$24,130	\$32,910	\$57,040
Total Possible Project and Admin. Budget	\$96,830	\$379,040	\$475,870

FY11

	<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
2010 Economic Impacts and 2011 Outlook	\$3,300	\$22,000	\$25,300
Monitoring Tourism in Montana & Beyond	\$11,920	\$30,000	\$41,920
Data Mining of ITRR data sets	\$0	\$13,540	\$13,540
Quarterly Nonresident Visitor Analysis	\$46,910	\$216,835	\$263,745
Montana Accommodations: Establishing a Visitation Reporting System	\$1,000	\$23,405	\$24,405
Elected officials Attitudes Toward MT Tourism Charter	1,020	\$5,000	\$6,020
Literature Review on the Effects of Climate Change on Tourism	\$0	\$2,600	\$2,600
Total Project	<u>\$64,150</u>	<u>313,380</u>	<u>377,530</u>
Administration	\$22,980	\$28,300	\$51,280
Total Project and Admin. Budget	<u>87,130</u>	<u>341,680</u>	<u>428,810</u>

FY10

	<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
Outlook and Economic Impacts	\$4,270	\$22,715	\$26,985
Monitoring Tourism in Montana & Beyond	\$28,850	\$30,180	\$59,030
Data Mining of ITRR data sets	\$125	\$10,922	\$11,047
Quarterly Nonresident Visitor Analysis	\$35,024	\$212,156	\$247,180
Geotourism -A Statewide Analysis	\$4,052	\$27,324	\$31,376
Economic Impact of the MT Alpine Ski Industry	\$2,750	\$25,511	\$28,261
Total Project	<u>\$75,071</u>	<u>\$328,808</u>	<u>\$403,879</u>
Administration	\$35,000	\$28,370	\$63,370
Total Possible Project and Admin. Budget	<u>\$110,071</u>	<u>\$357,178</u>	<u>\$467,249</u>

FY09

	<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
Outlook and Economic Impacts	\$3,550	\$21,810	\$25,360
Monitoring Tourism in Montana	\$31,850	\$27,240	\$59,090
Data Mining	\$50	\$35,275	\$35,325
Indian Country Visitor and Non-Visitor Analysis	\$11,240	\$41,680	\$52,920
Crown of the Continent Geotourism Evaluation	\$11,500	\$47,405	\$58,905
In-depth Analysis of Montana's vacationers to Glacier and Yellowstone	\$10,730	\$63,530	\$74,260
Q3 nonresident survey	\$2,250	\$28,290	\$30,540
Consumer Show Visitors: Propensity to Visit MT	<u>\$6,850</u>	<u>\$28,100</u>	<u>\$34,950</u>
Total Project	<u>\$78,020</u>	<u>\$293,330</u>	<u>\$371,350</u>
Administration	<u>\$59,730</u>	<u>\$21,810</u>	<u>\$81,540</u>
Total Possible Project and Admin. Budget	<u>\$137,750</u>	<u>\$315,140</u>	<u>\$452,890</u>

FY08

	<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
CTAP – one community	\$2,550	\$10,620	\$13,170
Outlook and Economic Impacts	\$2,490	\$18,372	\$20,862
Monitoring Tourism in Montana (includes interactive website)	\$13,620	\$23,608	\$37,228
Data Mining	\$50	\$11,275	\$11,325
Survey Kit and testing	\$850	\$28,647	\$29,497
Branding Montana	\$86,600	\$25,256	\$111,856
Climate Change and Montana's Tourism and Recreation Industry	\$820	\$14,091	\$14,911
Region and CVB Advertisement Response and Visitation	\$30,220	\$10,185	\$40,405
Total Project	\$137,200	\$142,054	\$279,254
Administration	\$50,600	\$21,289	\$71,889
Project and Admin. Budget	\$187,800	\$163,343	\$351,143

FY07

	<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
Data Mining of Nonresident/Resident Travel and Recreation	\$200	\$60,000	\$60,200
Monitoring Tourism in Montana	\$12,110	\$23,245	\$35,355
Outlook and Economic Impacts	\$2,640	\$17,415	\$20,055
Outfitter/Guide Industry Analysis	\$17,350	\$23,395	\$40,745
Agritourism	\$12,180	\$26,630	\$38,810
Shifting Economy to Amenity Resources	\$2,500	\$20,740	\$23,240
Expectations	\$250	\$9,760	\$10,010
Cultural Tourism Case Study	\$2,750	\$17,610	\$20,360
Total Project	\$49,980	\$198,795	\$248,775
Administration	\$44,600	\$21,275	\$65,875
Total Project and Admin. Budget	\$94,580	\$220,070	\$314,650

FY06

	<u>Operating*</u>	<u>Salary/Benefits</u>	<u>Total</u>
Economic Impacts 2005 and Travel Outlook 2006	\$2,600	\$21,222	\$23,822
2005-06 CTAP and Resident Attitudes	\$9,000	\$29,530	\$38,530
Monitoring Tourism in Montana	\$3,700	\$18,427	\$22,127
2005 Nonresident and Resident Travel and Recreation Survey	\$47,000	\$178,809	\$225,809
Total Project	\$62,300	\$247,988	\$310,288
Administration	\$45,200	\$18,596	\$63,796
Total Project and Admin. Budget	\$107,500	\$266,584	\$374,084

FY05

	<u>Operating*</u>	<u>Salary/Benefits</u>	<u>Total</u>
Travel Outlook and Economic Impacts 2004	\$2,600	\$19,500	\$22,100
2004-05 CTAP and Resident Attitudes	\$5,400	\$29,000	\$34,400
Monitoring Tourism in Montana	\$15,200	\$21,200	\$36,400
Pilot Test: Nonresident and Resident Travel and Recreation Survey	\$2,600	\$12,400	\$15,000
2005 Nonresident and Resident Travel and Recreation Survey	<u>\$36,960</u>	<u>\$147,800</u>	<u>\$184,760</u>
Total Project	\$62,760	\$229,900	\$292,660
Administration	\$54,140	\$17,415	\$71,555
Total Project and Admin. Budget	\$116,900	\$247,315	\$364,215



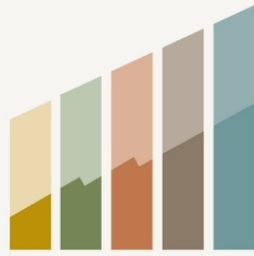
FY23 Audit Recommendations

MARKETING COMMITTEE MOTIONS

JANUARY 30, 2024

FY23 Audit Reports

- **Glacier Country**
The Committee recommends final approval as submitted of the FY23 Glacier Country audit with \$0.72 remaining in Uncommitted Tax Funds on Hand.
- **Southwest Montana**
The Committee recommends final approval as submitted of the FY23 Southwest Montana audit with \$0.79 remaining in Uncommitted Tax Funds on Hand.
- **Belgrade DMO**
The Committee recommends final approval as submitted of the FY23 Belgrade DMO audit with \$0.10 remaining in Uncommitted Tax Funds on Hand.
- **Visit Big Sky**
The Committee recommends final approval as submitted of the FY23 Visit Big Sky audit with \$0.03 remaining in Uncommitted Tax Funds on Hand.
- **Bozeman DMO**
The Committee recommends final approval as submitted of the FY23 Bozeman DMO audit with \$0.36 remaining in Uncommitted Tax Funds on Hand.
- **Butte DMO**
The Committee recommends final approval as submitted of the FY23 Butte DMO audit with \$0.54 remaining in Uncommitted Tax Funds on Hand.
- **Glendive DMO**
The Committee recommends final approval as submitted of the FY23 Glendive DMO audit with \$0.48 remaining in Uncommitted Tax Funds on Hand.
- **Helena DMO**
The Committee recommends final approval as submitted of the FY23 Helena DMO audit with \$0.10 remaining in Uncommitted Tax Funds on Hand.
- **Kalispell DMO**
The Committee recommends final approval as submitted of the FY23 Kalispell DMO audit with \$0.11 remaining in Uncommitted Tax Funds on Hand.
- **West Yellowstone DMO**
The Committee recommends final approval as submitted of the FY23 West Yellowstone audit with \$0.04 remaining in Uncommitted Tax Funds on Hand.



MONTANA
DEPARTMENT OF COMMERCE

FY24 Budget Recommendations

MARKETING COMMITTEE MOTIONS

JANUARY 30, 2024

FY24 Budget Increase

The following Regions and DMOs are requesting final approval to increase their FY24 Plan budgets.

- **Central Montana**
Increase the budget \$24,860 using Uncommitted from Audit Funds. The total budget increases to \$576,917
- **Missouri River Country**
Increase the budget \$21,266 using increased projected revenue collections. The total budget increases to \$332,859
- **Southwest Montana**
Increase the budget \$309,282 using Uncommitted from Audit Funds. The total budget increases to \$1,276,003
- **Yellowstone Country**
Increase the budget \$334,000 using increased projected revenue collections. The total budget increases to \$3,674,004
- **Belgrade DMO**
Increase the budget \$58,919 using Uncommitted from Audit Funds. The total budget increases to \$136,155
- **Bozeman DMO**
Increase the budget \$31,992 using Uncommitted from Audit Funds. The total budget increases to \$637,264
- **Butte DMO**
Increase the budget \$26,763 using Uncommitted from Audit Funds. The total budget increases to \$219,112
- **Glendive DMO**
Increase the budget \$965 using Uncommitted from Audit Funds. The total budget increases to \$29,618
- **Helena DMO**
Increase the budget \$52,000 using \$31,335 of Uncommitted from Audit Funds and \$20,665 of increased projected revenue collections. The total budget increases to \$235,000
- **Kalispell DMO**
Increase the budget \$33,025 using Uncommitted from Audit Funds. The total budget increases to \$293,025
- **West Yellowstone DMO**
Increase the budget \$38,343 using Uncommitted from Audit Funds. The total budget increases to \$476,325



Summer Lodging Tax Revenue

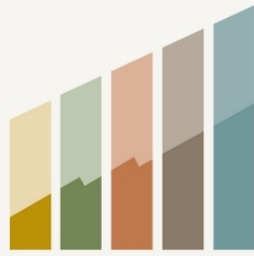
SUMMER LODGING TAX REVENUE
JULY 1 - SEPTEMBER 30, 2023
REPORT DATE: JANUARY 23, 2024

Please Note: Revenue collected is 4% of the lodging price. The percentages listed below are affected by rate increases, delinquencies, and other factors. They should not be considered an equal correlation of increase or decrease in the number of travelers.

	2022	2023	%(+ or -)
Central Montana	\$1,183,832	\$1,091,091	-8% Lower overall collections, delinquencies
Glacier Country	\$9,745,734	\$9,882,579	+1% Higher overall collections with some delinquencies
Missouri River Country	\$178,078	\$188,530	+6% Higher overall collections
Southeast Montana	\$2,034,300	\$2,236,479	+10% Higher overall collections
Southwest Montana	\$2,302,728	\$2,160,347	-6% Lower overall collections, delinquencies
Yellowstone Country	\$7,627,472	\$9,321,266	+22% Higher overall collections
State	\$23,072,144	\$24,880,292	+8%

City totals listed are within country totals listed directly above.

Anaconda	\$85,508	\$82,439	-4% Lower overall collections
Belgrade	\$224,092	\$189,856	-15% Lower overall collections, delinquencies
Big Sky	\$1,532,242	\$1,686,541	+10% Higher overall collections
Billings	\$1,386,142	\$1,429,749	+3% Higher overall collections
Bozeman	\$1,926,216	\$1,958,017	+2% Higher overall collections
Butte	\$661,058	\$608,433	-8% Lower overall collections, delinquencies
Columbia Falls	\$170,929	\$165,714	-3% Lower overall collections, delinquencies
Dillon	\$134,146	\$128,637	-4% Lower overall collections, delinquencies
Gardiner	\$34,171	\$364,151	+966% Higher overall collections
Glendive	\$98,828	\$97,765	-1% Lower overall collections
Great Falls	\$695,078	\$607,150	-13% Lower overall collections, delinquencies
Havre	\$67,123	\$56,307	-16% Lower overall collections, delinquencies
Helena	\$568,656	\$496,883	-13% Lower overall collections, delinquencies
Kalispell	\$939,101	\$996,564	+6% Higher overall collections
Livingston	\$222,828	\$237,123	+6% Higher overall collections
Miles City	\$128,545	\$170,454	+33% Higher overall collections
Missoula	\$1,708,520	\$1,799,025	+5% Higher overall collections
Red Lodge	\$138,520	\$175,065	+26% Higher overall collections
West Yellowstone	\$1,477,062	\$1,805,886	+22% Higher overall collections
Whitefish	\$1,188,213	\$1,219,547	+3% Higher overall collections



MONTANA

DEPARTMENT OF COMMERCE

Spring Lodging Tax Revenue

SPRING LODGING TAX REVENUE
APRIL 1 - JUNE 30, 2023
REPORT DATE: JANUARY 23, 2024

Please Note: Revenue collected is 4% of the lodging price. The percentages listed below are affected by rate increases, delinquencies, and other factors. They should not be considered an equal correlation of increase or decrease in the number of travelers.

	2022	2023	%(+ or -)
Central Montana	\$823,937	\$825,925	+0%
Glacier Country	\$5,084,892	\$4,982,871	-2% Lower overall collections
Missouri River Country	\$156,492	\$163,645	+5% Higher overall collections
Southeast Montana	\$1,837,763	\$1,908,312	+4% Higher overall collections
Southwest Montana	\$1,576,467	\$1,630,959	+3% Higher overall collections
Yellowstone Country	\$4,732,440	\$5,532,795	+17% Higher overall collections
State	\$14,211,991	\$15,044,507	+6%

City totals listed are within country totals listed directly above.

Anaconda	\$49,108	\$53,721	+9% Higher overall collections
Belgrade	\$186,205	\$140,224	-25% Lower overall collections
Big Sky	\$632,547	\$766,505	+21% Higher overall collections
Billings	\$1,285,374	\$1,285,306	-0%
Bozeman	\$1,334,977	\$1,394,588	+4% Higher overall collections
Butte	\$448,457	\$452,644	+1% Higher overall collections
Columbia Falls	\$63,071	\$57,815	-8% Lower overall collections
Dillon	\$90,395	\$99,927	+11% Higher overall collections
Gardiner	\$134,926	\$204,351	+51% Higher overall collections
Glendive	\$71,120	\$69,103	-3% Lower overall collections
Great Falls	\$474,152	\$485,845	+2% Higher overall collections
Havre	\$51,132	\$43,981	-14% Lower overall collections
Helena	\$434,851	\$458,322	+5% Higher overall collections
Kalispell	\$470,100	\$454,682	-3% Lower overall collections
Livingston	\$139,396	\$152,196	+9% Higher overall collections
Miles City	\$112,900	\$133,511	+18% Higher overall collections
Missoula	\$1,197,568	\$1,239,848	+4% Higher overall collections
Red Lodge	\$67,193	\$92,706	+38% Higher overall collections
West Yellowstone	\$865,973	\$1,062,859	+23% Higher overall collections
Whitefish	\$515,592	\$481,153	-7% Lower overall collections