



Grant Details

118486 - FY23 DMO Plan

122515 - FY 2022-2023 Destination Missoula Marketing Plan

DOC Office of Tourism

Grant Title: FY 2022-2023 Destination Missoula Marketing Plan
Grant Number: 23-51-054
Grant Status: Underway
Comments:
Applicant Organization: Missoula Convention & Visitors Bureau
Grantee Contact: Sage Grendahl
Award Year: FY23
Program Area: DOC Office of Tourism
Amounts:
Contract Dates: Contract Sent 06/15/2022 Contract Received 07/01/2022 Contract Executed 06/30/2023
Project Dates: Proposal Date 06/15/2022 Project Start 07/01/2022 Project End 06/30/2023
Grant Administrator: Barb Sanem
Contract Number: 23-51-054
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.

Due to technical difficulties, the narrative section for Question 1. is below as an attachment. It is named Narrative and is a word doc.

2. Align with Montana Brand

Briefly describe how your destination aligns with the Montana Brand.

DESTINATION MISSOULA & THE MONTANA BRAND

Destination Missoula's mission and goals align beautifully with the Montana brand, and we promote the state's brand pillars throughout all of our messaging.

More spectacular unspoiled nature than anywhere else in the lower 48 states.

Our messaging highlights the breathtaking nature surrounding Missoula and unbeatable access to outdoor adventure.

Vibrant and charming small towns that serve as gateways to the state's natural wonders.

Missoula is a gateway to natural wonders, as well as an adventure in and of itself. Our visitors are charmed by the possibility of shopping, dining, and dipping their toes in the Clark Fork River without walking more than a few blocks.

Breathtaking experiences by day and relaxing hospitality at night.

Accessibility, inclusivity and adventure all play an integral part in our messaging. Our visitors come here expecting to immerse themselves in nature by day and return to a vibrant, welcoming community by night.

3. What is the strategic role of your DMO?

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

Destination Marketing, Destination Management, Destination Stewardship, Destination Development

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

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

DESTINATION MISSOULA'S STRATEGIC ROLE

Destination Missoula works to serve the roles of Destination Marketing, Destination Development, Destination Management and Destination Stewardship.

Our organization has always served the purpose of destination marketing, but our dedication to this community and its members requires a hybrid approach. On top of promoting our city and the surrounding area as a premier destination, we are constantly working to improve and preserve Missoula.

We work alongside community leaders and stakeholders in order to best serve Missoula's visitors and residents. This means ongoing collaboration with organizations such as the Downtown Missoula Partnership, Missoula Chamber of Commerce, Missoula Parks & Recreation, and other destination marketing organizations throughout the region. In our role of Destination Development, we will be working with the Missoula Montana Airport to help develop both the temporary and permanent visitor information centers in the new terminal. Our Destination Stewardship Plan is a testament to our commitment to destination management and stewardship, as it will pave the way for a rich, healthy tourism industry that takes all angles into account.

As with any destination in Montana, we enjoy breathtaking natural landscapes in every direction. Missoula is a city you can enjoy inside and out, and our visitors come to enjoy the juxtaposition of big-city amenities alongside natural spaces. In order to preserve this, we've shifted much of our focus to Destination Stewardship. From "recreate responsibly" messaging to projects like our Downtown River Map, website and video collaboration. Destination Missoula is fiercely dedicated to the health of our wild spaces. We're confident that educated visitors are happy visitors, and our tourism industry will stand the test of time as long as we promote it responsibly.

On top of our commitment to sustainability, we'll continue our work in Destination Stewardship by creating marketing materials and messaging, based on extensive research, that's inclusive and representative of a diverse community, allowing us to reach a wide audience and ensure that everyone feels welcome in Missoula.

GEOGRAPHIC

The strategy of targeting a particular type of traveler can be enhanced by also targeting a particular geographic area. It is most effective to market to those who are predisposed to come to this area. Destination Missoula concentrates on more "niche" marketing, particularly direct flight and drive markets. Direct flight markets include Seattle, Salt Lake City, Las Vegas, Minneapolis, Chicago, Denver, Portland, Los Angeles, San Francisco, Oakland, Atlanta, Dallas, San Diego, and Phoenix. Destination Missoula also directs our outreach to our drive markets, which includes an approximate 200 – 300-mile radius from Missoula: Spokane, Washington; Coeur d'Alene, Sandpoint, Lewiston, Boise, Salmon and Idaho Falls, Idaho; and Yellowstone Park, Bozeman, Butte, Great Falls, Glacier National Park, Kalispell, Montana; and Alberta, Canada. To ensure the most effective use of marketing funds and energies, markets will be pursued in the following order:

- Non-stop flight markets.
- Regional drive markets.
- The primary states from which most inquiries come: Texas, California, Florida, Illinois, Washington, Ohio, Wisconsin, Michigan, Minnesota, Pennsylvania.
- The secondary states from which most inquiries come: Tennessee, Missouri, Georgia, New York, Indiana, North Carolina, Iowa, Arizona, Louisiana, Kentucky.
- Montana residents.

DEMOGRAPHIC

In addition to the geographic target markets, there are demographic markets Destination Missoula will target with tourism promotion and marketing. Each of these markets represents a strong and growing segment of the tourism marketplace. Destination Missoula will pay particular attention through this marketing plan to niche marketing for small and mid-size market meetings, sporting events, signature events, arts and culture, music and entertainment, food and spirits, leisure and family travel. The average visitor to Missoula is 52 years of age with an income of \$75,000 –

\$200,000+, and 77% of visitors were either traveling alone or as a couple. The demographic markets are described on the following page.

PSYCHOGRAPHIC

- Active empty-nesters
- Baby boomers
- Business travelers
- Cultural and historical-experience travelers
- Family travel
- Leisure travelers
- Outdoor enthusiasts
- Motorcyclists
- Recreational vehicle travelers
- Women
- Geo-travelers
- Multigenerational travelers
- Culinary and spirits travelers
- LGBTQ travelers
- Adaptive travelers
- Music, concert and festival travelers
- Birders
- Sustainability travelers
- Wellness travelers
- Remote workers and students
- Last-minute travelers
- “Revenge travelers”
- In-state travelers

3b. What research supports your DMO strategy?

Research on each of the existing and emerging markets for Missoula is available from the following sources:

- Montana Office of Tourism and Business Development – General Travel Statistics
- STR Reports – Missoula-Specific Hotel Statistics and competitive market analysis
- U.S. Travel Association – 2021 Forecast (<https://www.ustravel.org/research/travel-forecasts> and Answer Sheet – (<https://www.ustravel.org/answersheet>)
- Destination Analysts - (<http://destinationsanalysts.com/insights-updates/>)
- Longwoods International Travel Sentiment Surveys and Research - (<https://longwoods-intl.com/covid-19>)
- Trekkssoft - <https://www.trekkssoft.com/en/resources/ebooks/travel-trends-report-2020>)

- Cision - 2021 State of the Media Report - (<https://www.cision.com/resources/research-reports/2021-state-of-the-media/>)
- Institute of Tourism and Recreation Research - 2021 Interactive Data Reports for City of Missoula
- Institute of Tourism and Recreation Research - 2020 Nonresident Traveler Expenditures & Economic Contribution in Glacier Country Travel Region
- Canadian Government Travel Statistics (<http://www.statcan.gc.ca/start-debut-eng.html>)
- U.S. Department of Commerce, Office of Travel & Tourism Industries – Canadian Travel Statistics (http://travel.trade.gov/outreachpages/inbound_general_information.inbound_overview.html)
- Institute of Tourism and Recreation Research (<http://www.itrr.umt.edu/nonres/2018DomCanInterExpend.pdf>)
- Future of Tourism Coalition - (<https://www.futureoftourism.org/>)
- Center for Responsible Travel - (<https://www.responsibletravel.org/>)
- Destination Stewardship Center - (<https://destinationcenter.org/>)
- The Travel Foundation - (<https://www.thetravelfoundation.org.uk/>)
- Sustainable Travel, Intl. - (<https://sustainabletravel.org/>)
- University of Minnesota Tourism Research Reports – Sustainable Tourism (<http://www.tourism.umn.edu/ResearchReports/MarketSegments/Sustainable>)
- Hoteliers – Hotel, Travel & Hospitality News – Report: More Affluent Travelers, More Women Setting Travel Trends (<http://www.4hoteliers.com/features/article/8196>)
- The Wandering RV - 70+ Female Travel Statistics and Trends - (www.thewanderingrv.com/female-travel-statistics)
- Sports Events and Tourism Association - State of the Industry Report 2019 (www.sportseta.org/research/state-of-theindustry-report)
- National Association of Sports Commissions – 2017 Sports Tourism: A State of the Industry Report (www.sportscommissions.org)
- Sports Tourism: Sleeping Giant of the Tourism Market, Lavonne Wittmann
- Project Play, Aspen Institute - State of Play 2021 Report (www.aspenprojectplay.org/state-of-play-2021/introduction)
- Skift.Com - The New Era of Food Tourism Trends and Best Practices for Stakeholders (research.skift.com/reports/thenew-era-of-food-tourism-trends-and-best-practices-for-stakeholders/)
- U.S. Travel – Comprehensive Culinary Travel Survey Provides Insights on Food and Wine Travelers (<http://www.ustravel.org/news/press-releases/comprehensive-culinary-travel-survey-provides-insightsfoodand-wine-travelers>)
- Skift – Megatrends Defining Travel in 2022 (skift.com/megatrends-2022)
- About Tourism – Destination Marketing and the “FOOD” Element: A Market Overview (<https://abouttourism.wordpress.com/tag/culinary-tourism>)

- Cision PR Newswire - (www.prnewswire.com/news-releases/global-culinary-tourism-market-2020-to-2027---by-activitytype-age-group-and-mode-of-booking-301106550.html)
- Kaplan University – Mapping the Study of Motorcycle Tourism (www.kaplanuniversity.edu) • Motorcycle Tourism – Motorcyclists the PURE Tourist (<http://www.slideshare.net/alig8r/motorcycle-tourism>)
- ITRR - Motorcycle Touring in Montana: A Market Analysis
- USA Today – Women Help Rev Up Motorcycle Industry (<https://www.usatoday.com/story/money/business/2017/09/01/women-help-rev-up-motorcycle-industry/573631001/>)
- CMI Community Marketing & Insights – 24rd Annual LGBT Tourism and Hospitality Survey (<http://www.communitymarketinginc.com>)
- Travel Weekly – Music Tourism Has Potential, But Industry Must Pick Up The Tempo – <http://www.travelweekly.com/northAmerica-Travel/Music-tourism-has-potential-but-industry-must-pick-up-the-tempo>

3c. What are your emerging markets?

The following areas are emerging tourism markets that Destination Missoula feels are a perfect fit for Missoula, and our marketing will be directly tailored to them:

WELLNESS TRAVEL

The Global Wellness Institute estimates tourism grew into a \$652.8 billion market in 2021, and that number only stands to rise as more people feel it's safe to revisit their travel plans. It used to be that food created the buzz that lured travelers to all sorts of destinations, but wellness is taking over as travelers seek out healthier, more active vacations. Food is still a draw, of course, but it is even more enticing if it satisfies a wellness craving. The hope is that if wellness travel is marketed in a strategic way, it can work to prevent overtourism, drawing people away from beyond-crowded cities and into more tranquil, less touristy locales that could use the economic boost. This desire for wellness and tranquility is more relevant than ever in light of the pandemic. Missoula is a great option for health and wellness travelers because of the sheer number of spas and workout studios in a relatively small area. Missoula ranked number 1 on SmartAsset's Most Fitness-Friendly Places for 2018, and is ranked two for 2020 with 125 fitness businesses per 10,000 residents.

MUSIC AND ENTERTAINMENT

More than 32 million people in the U.S. travel to attend at least one music festival per year. Of those 32 million, 14.7 million are millennials. Missoula's burgeoning music and entertainment scene is the perfect fit for this niche market. With nationally acclaimed venues such as The Top Hat and The Wilma Theatre, Big Sky Amphitheater and KettleHouse Amphitheater, we believe Missoula is going to continue to see the music scene explode over the next few years. Destination Missoula will actively partner with music venues to market to music writers and media to bring them to Missoula, and revisit our music-focused marketing as our music scene returns to its pre-pandemic status. Our music website for Missoula— missoula.live—will continue to give people a comprehensive view of the music and entertainment experiences that Missoula offers. Pollstar named Missoula's Logjam Presents as #26 on their list of Top 100 World-Wide Promoters, with the KettleHouse Amphitheater landing #8 in their rankings of the Top 100 Outdoor Amphitheaters and getting nominated for Outdoor Concert Venue of the year in 2022.

FILM PRODUCTION

Missoula has a strong foundation when it comes to the arts and creative opportunities, and we believe film production is an emerging market with the potential to bring huge economic growth to Missoula. According to the “Economic Impact of Montana Film Production” report, film production in Montana had an economic impact of nearly \$50 million and supported the equivalent of 280 full-time jobs in 2019. In 2020 we saw the hit series “Yellowstone” leave Utah to relocate its production to Missoula, where it does much of its shooting. The show “Maid” (written by a University of Montana graduate) garnered national attention for Missoula, as it reached 67 million households and got featured in articles such as Oprah Daily, NPR, Washington Post, News Week, Parade and the New York Times. We will closely monitor new opportunities in this market throughout the year.

FLIGHT MARKETS

The Missoula Montana Airport added new direct flights into San Francisco, San Diego and Los Angeles. As Missoula is constantly looking for opportunities to bring new service into Missoula, it is vitally important that Destination Missoula markets to any new service areas, as well as our existing direct flight markets to make sure our existing flights remain viable and service only continues to expand. With the \$110,000,000 airport expansion, additional gates, increased capacity, and passenger amenities, Missoula will only continue to grow as a destination for travelers.

CULINARY

We currently see 39 million travelers identify themselves as culinary travelers. Annually, they created a \$201 billion economic impact. On average, they spend \$1,194 per trip with up to 50% spent directly on food and food-related activities. It is currently one of the fastest-growing sectors in tourism worldwide. They tend to be younger, more affluent and better educated travelers. Millennials, having become the largest traveling demographic in the U.S., list culinary experiences as very important. They feel it is the best way to get to “know the story” of a place. Trends are moving from the most expensive dining experience to the most authentic. The culinary traveler is looking for a unique experience and likes packages based around cooking classes, farmers markets, gourmet food shopping, winery, brewery and distillery tours and festivals. Culinary travelers tend to plan ahead using both print and online media sources. With Missoula’s exciting and varied food scene from fine dining and cafés, to farm-to-table sustainability, food trucks, breweries, wineries and distilleries, culinary tourism is a perfect niche to target. Exposure to the food scene has been, and will continue to be a priority when bringing in press writers, and we are actively looking for new opportunities to help Missoula’s food and beverage industry by reaching more culinary travelers. The culinary industry, as well as the whole tourism industry, was particularly hard hit with the pandemic. Destination Missoula will focus on special projects throughout the year to help their recovery.

CANADIAN TRAVEL

Pre-pandemic, it was estimated that Canadian visitors made up 10% (1,366,000) of all nonresident travelers to the state. Of those travelers, 45% were primarily “just passing through,” 37% were in Montana for “vacation, recreation, or pleasure,” and 9% were primarily in the state for “shopping.” One of the more striking overall trends in Canadian visitation to Montana is the decrease in not only the number of Canadian residents visiting Montana, but also their reported spending. In 2013, ITRR estimated that 1.6 million Canadians visited Montana, spending an estimated \$306 million in the process. By 2018, estimates for the number of Canadian visitors dropped to 1.34 million, with expenditure estimates being cut almost in half at roughly \$155 million. The most visited region was Glacier Country with 71% of respondents having been there on a previous visit. When asked what would increase their likelihood to return to Montana, visitors said more information on new and different things to do, a wider range of retail shopping opportunities, increased opportunities to experience local cuisine and more opportunities to experience cultural heritage. Missoula has the ability to provide all of these experiences for Canadian travelers. Destination Missoula will continue to monitor the COVID-19 travel restrictions, and revisit our marketing efforts to Canada.

LGBTQ+

LGBTQ+ travel is a \$211 billion industry in the U.S. These travelers average seven trips annually—four for leisure and three for business. Their average age is 48, with a household income of \$50,000 and up. They prefer mid-range hotels that understand their needs, and they tend to return to areas they feel do the best job of outreach and are safe and

relaxing. LGBTQ+ travelers look for culture, arts, food and wine, rest and relaxation, and nature is important particularly to women. Of the 17 top cities they tend to visit, Missoula has direct flights into nine, and given the current political climate, Missoula's open and welcoming environment and status as a cultural hub make it a safe place for LGBTQ+ people to visit. The Missoula Art Museum's rainbow crosswalk across Pine street serves as a symbol of Missoula's diversity and openness to various identities.

YOUTH SPORTS – SPORTS AND EVENTS

The youth sports travel sector is now a \$17 billion travel industry. The youth sports industry in the U.S. has ballooned to a \$15.3 billion business, and there has been more than 55% growth since 2010. It is estimated that more than 48.9 million kids between the ages of 5 and 18 currently play at least one organized sport each year in the U.S. and 21 million are involved in non-school youth sports. The average youth athlete plays 2.5 sports. Youth sports also generate family and multigenerational travel. 41% of children with a household income of \$100,000 or more participate in team sports and 19% of children with household incomes of \$25,000 or less participate. American families spent an average of \$3,167 per player/per sport on the road for what are now being called "tournaments." Missoula continues to see success in our Youth Sports Events market thanks to partners like the Montana High School Association, Missoula Youth Hockey Association and Fort Missoula Regional Park.

MOTORCYCLE

Motorcycle travel is one of the fastest growing segments in tourism. It is a \$34 billion industry with over 11 million riders. The demographic trend has been older and more affluent as more baby boomer professionals become interested in motorcycle travel. The average HHI is \$85,000+ with 84% having attended college and 16% with postgraduate degrees. However, now you are starting to see more millennial riders. Women are becoming the fastest growing segment. Gen X women are three times more likely to own and regularly ride their bikes, and women motorcycle tour businesses are starting to thrive. An average trip lasts 10–14 days, spending \$3,100 per trip. They also love to attend related events averaging three events per year spending an average of \$400 per weekend event attended. A 2019 study released by the Institute of Tourism and Recreation Research, states that in 2018 393,800 nonresident motorcyclists visited the state. They spent approximately \$110/day and stayed an average of 2.45 nights. Total spending in quarters 2 and 3 of 2018 by nonresident motorcyclists was \$80,030,000. Ten percent of all visitors enter Montana on motorcycles and 4% spend one or more nights in Missoula. Missoula is on a major route for riders coming from the West Coast and those wanting to see Glacier National Park. Destination Missoula will be doing specific niche marketing and website itineraries to market to these riders. More specifically, Missoula will be targeting women motorcycle riders. Destination Missoula is also seeing more interest from international tour operators in motorcycle itineraries for their clients and will create specific itineraries scoped to this market.

INTERNATIONAL

The United States remains the single largest destination for global long-haul travel and the third-largest destination for overall global travel, but our market share has declined considerably since 2015 and fell sharply in 2020 due to COVID-19 travel restrictions and safety precautions. Total inbound international travel went from 79.4 million in 2019 to 19.4 million in 2020, travel spending and passenger fares went from \$179.1 million in 2019 to \$38.1 million in 2020, and direct travel jobs went from 1.2 million in 2019 to 0.4 million in 2020. Although 2021 international travel figures are not in at this time, this market was forecast to increase to 21 million travelers, 10.2% above 2020 numbers. On average, each overseas traveler spends approximately \$4,200 and stays an average 18 nights and the top leisure travel activities for overseas visitors are shopping, sightseeing, fine dining, national parks/monuments, and amusement/theme parks. While we can't predict the short and long-term impact of the pandemic on international travel, we will continue to watch for opportunities in this emerging market.

UNIVERSITY OF MONTANA FAMILY AND RECRUITS

The University of Montana is located in Missoula and comprised of students from all over the state, region and country, meaning prospective students and their families will visit Missoula when touring campus. During this time, students will have the opportunity to fall in love with Missoula as a place to live as well as attend school, and their families will continue to visit for events, sports, graduation and general visits. This is a huge benefit to Missoula as it

allows a constant influx of visitors. Many graduates might then choose to live in Missoula, and those who do relocate will come back to their old college stomping grounds for decades to come. Destination Missoula is working with the University of Montana to help recruiting efforts by promoting Missoula as a place of great diversity of ideas, as a cultural haven in Montana and in the region, and as a welcoming and safe community for locals and visitors alike.

SUSTAINABILITY

These travelers tend to be highly educated, mature, affluent, well-traveled, environmentally aware and sensitive to the social and cultural traditions, systems and mores of the destination they visit. They are similar to, and in many cases crossover with, the culinary traveler. Missoula is proud of the many sustainable initiatives that show our commitment to living our values. For example, Logjam Presents has implemented a Zero Waste policy at their venues with compostable cups, plates and cutlery and recycle cans with readily available bins. Missoula's community bus service, Mountain Line, introduced six zero-emissions electric buses to their fleet in the summer of 2019 and will be adding six more by spring of 2022, furthering their goal to have a zero-tailpipe-emissions fleet by 2035. The Big Sky Documentary Film Festival is striving to be a Zero-Waste event by providing recycling and composting stations at all of their venues, limiting food vendors to those who provide recyclable and compostable silverware, promoting reuse by distributing reusable cups to guests and making the festival walk-friendly. The River City Roots Festival provides compost and recycle stations, reusable cups in the place of single-use plastics and housing the events in a walkable zone. Both the City of Missoula and Missoula County have also recently committed an initiative for 100% clean electricity by 2030.

BIRDING

It is estimated that approximately 45 million people in the U.S. are bird-watchers. According to an analysis done by The American Birding Expo, birders in the U.S. spend approximately \$14.8 billion on travel-related expenses, and the U. S. Fish & Wildlife Service states that the higher the income and education level, the more likely a person is to be a birder. U.S. birdwatchers are usually highly educated, affluent, slightly more women (56%), usually travel solo or with a partner, but not large groups, and, although made up of all age groups, middle-aged and elderly people represent the largest group (40–70). They usually will spend 13 –14 days birding away from home. Situated along pristine rivers offering exceptional riparian zones, Missoula and the Bitterroot Valley are brimming with numerous habitats and a wide variety of bird species. Both areas are havens for bird-watchers. Three of the best known spots in the area are Kelly Island, a 650-acre conservation area comprised of six islands at the confluence of the Bitterroot and Clark Fork rivers; Lee Metcalf National Wildlife Refuge, a 2,700-acre refuge with more than 225 identified species; and the 1,200-acre Teller Wildlife Refuge.

HISTORY AND CULTURE

Missoula proudly lives our history. Evidence of the prehistoric ice age floods and Glacial Lake Missoula are still etched on the mountains surrounding Missoula. The indigenous peoples of the Missoula Valley were members of the Salish Tribes. Over the centuries, Séliš (Salish), Ksanka (Kootenai), Pend d'Oreille (also known as Qlispé (Kalispel)), Nimi'ipuu (Nez Perce), A'aninin (Gros Ventre) and the Niitsitapi (Blackfoot Tribes) used the Missoula Valley as a travel route to the eastern plains and buffalo. They called the area "Nemissoolatakoo," from which "Missoula" is derived. The word translates roughly to "river of ambush/surprise," a reflection of the inter-tribal fighting common to the area. Their first encounter with non-natives came in 1805, when the Lewis and Clark expedition passed through the Missoula Valley. Missoula and the surrounding five valleys' rich history comes alive in places like Travelers' Rest State Park and the Historical Museum at Fort Missoula. Missoula is full of ways to become immersed in the history and culture - from historic downtown tours, river walks and tours of the Missoula Smokejumper's Center to walking portions of the Lewis and Clark trail, enjoying traditional pow wows and sharing meals from the many diverse cultures that have since made this special place home. The Downtown Missoula Partnership, partnered with Historical Research Associates, the city's Historic Preservation Commission, and the Historical Museum at Fort Missoula and produced a vision for a comprehensive heritage program in downtown Missoula, including both banks of the Clark Fork River. There are few, if any, communities the size of Missoula that have developed a defined heritage interpretive plan, and it could act as a prototype for other Montana towns to use. The Montana Natural History Center serves as a fantastic spot to learn about the biodiversity of Western Montana, including full-scale replicas and mounts of local animals like bears,

mountain lions and ungulate species. Visitors can learn about the history, legacy and modern traditions of the American Indian tribes who call this area their ancestral home at places like the Payne Family Native American Center, which is the site of a historic Salish Indian encampment, the Native Amer

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.

Our organization has identified three goals that guide our efforts throughout FY 2023 and beyond. We reached these through thoughtful collaboration with our boards and consultation from MMGY NEXTFactor, and they directly tie in to the goals and initiatives for year one of our three-year Strategic Plan completed in September 2021. These goals are:

- Promote our destination with an emphasis on increasing sustainable year-round visitation.
- Create a more responsible, sustainable tourism destination and organization.
- Gain a deeper understanding of our visitors and residents through research.

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

MARKETING & DEVELOPMENT

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

Objectives:

Maintain visitation in warm season and increase in the off season.

Metric(s):

- Increase occupancy 1% during shoulder season (October-April).
- Partner with the Missoula Montana Airport to provide additional funding and resources for the airport visitor information center.

Market to visitors with responsible travel messaging.

Metric(s):

- Use traditional and innovative methods of marketing and platforms to promote messaging.

MANAGEMENT & STEWARDSHIP

Create a more responsible, sustainable tourism destination and organization.

Objectives:

Create a Destination Stewardship Plan.

Metric(s):

- Create a Request For Proposal.
- Hire a consultant.
- Continue through the planning process.

Focus on community alignment.

Metric(s):

- Arrange 6 meetings with community stakeholders regarding the benefits of tourism and overall destination management.

Educate staff through professional development opportunities.

Metric(s):

- Belong to Destination's International in order to attend webinars, summits, DA convention, and more.
- Attend the Governor's Conference.

DESTINATION MANAGEMENT

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

Objectives:

Collect, analyze and expand visitor and resident data. This information will help us define our visitor demographics, characteristics, time and flow within our community and economic impact to hone our outreach. It will also help us define resource use and management through resident and non-resident use to balance the needs of both.

Metric(s):

- Use research from AirDNA, STR and ITRR.
- Monitor VIC and Call Center data.
- Track web analytics.
- Looking into new tools such as Zartico and Key data.

Redefine KPIs (Key Performance Indicators).

Metric(s):

- Addition of new analytic tools and information from the Destination Stewardship Plan will help us redefine future KPIs

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Narrative.docx

Objectives/Metrics/Evaluation

Objectives	Measurable Metrics for Success	Report the Metric Achieved	Evaluation of Measurable Metrics for Success
<p>Maintain visitation in warm season and increase in the off season.</p>	<p>Increase occupancy 1% from prior year (50.7%) during shoulder season (October-April).</p> <p>Maintain occupancy from prior year (79.5%) during warm season (May-September).</p> <p>Partner with the Missoula Montana Airport to provide additional funding and resources for the airport visitor information center.</p>	<p>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.</p> <p>Shoulder Season – (October-April)</p> <p>2021-2022: 50.7%</p> <p>2022-2023: 50.4%</p> <p>Warm Season – (May-September)</p> <p>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.)</p> <p>2022-2023: 77.1%</p>	<p>We didn't meet our objective. 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. While we had money budgeted in FY 22-23 to partner with the Missoula Montana Airport for their visitor information center, no money was spent. It's likely funds will be expended in FY 23-24.</p>

<p>Market to visitors with responsible travel messaging.</p>	<p>Promote responsible travel messaging through traditional and innovative methods of marketing and platforms.</p> <p>Use responsible travel messaging in the majority of all paid media campaigns.</p>	<p>Destination Missoula used the responsible recreation message: "Travel Safely. Explore Responsibly." across the board on all print and digital ads that were placed in FY22-23 (except for mobile advertising which were too small to accommodate the text).</p> <p>Destination Missoula included responsible travel tips and messaging in the travel guide and throughout the website, including a banner on the homepage.</p> <p>We had print ads in such publications as Sunset, Backpacker, and Midwest Living magazines that promoted responsible recreation, just to 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.</p>	<p>We met our objective. This marketing method was successful. Responsible travel messaging is an important initiative for our organization and the community.</p>
<p>Create a Destination Stewardship Plan.</p>	<p>Create a Request For Proposal.</p> <p>Hire a consultant.</p> <p>Continue through the planning process.</p>	<p>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.</p>	<p>We met our objective. Our marketing method was successful. Creating a Destination Stewardship Plan provides us with a tourism roadmap for Missoula for the next decade.</p>
<p>Focus on community alignment.</p>	<p>Arrange 6 meetings with community stakeholders regarding the benefits of tourism and overall destination management.</p>	<p>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 which were open to the public.</p>	<p>We met our objective, and this marketing method was successful. Through our Destination Stewardship Planning process, we engaged many key community stakeholders about the benefits and challenges of tourism and are creating a tourism roadmap for the next 10 years.</p>
<p>Educate staff through professional development opportunities.</p>	<p>Belong to Destinations International in order to attend webinars, summits, DI convention, and more.</p> <p>Attend the Governor's Conference.</p>	<p>We are members of Destinations International. 100% of our staff attended two educational events throughout the year. Bed tax funds pay for our Executive Director's professional development expenses. Our Executive Director, Barb Neilan, participated in the following Destinations International events:</p>	<p>We met our objective. Our marketing method was successful. It is important for staff to receive continuing education, so they can contribute to the success of the organization.</p>

	<p>100% of the full-time staff will attend at least two webinars, summits or conferences/conventions during FY 22-23</p>	<ul style="list-style-type: none"> Equity, Diversity & Inclusion Leadership Session Advocacy Summit CEO Summit <p>Barb also attended the Governor's Conference on Tourism.</p>	
<p>Collect, analyze and expand visitor and resident data. This information will help us define our visitor demographics, characteristics, time and flow throughout our community and their economic impact in order to hone our outreach. It will also help us to understand resource use by residents and non-residents in order to balance the needs of both.</p>	<p>We will use the data from the following research sources to generate reports at least quarterly to our boards to update them on trends and changes to our market, and to help us reevaluate our marketing and resource management strategies for FY24:</p> <ul style="list-style-type: none"> Reports from AirDNA, STR and ITRR on visitation, occupancy and ADR trends. Reports regarding demographics of visitors to our VIC, Call Center and web site. Reports from new tools such as Zartico and Key Data to understand where visitors originated, time spent and flow while in our community. 	<p>We provided monthly reports to our board of directors for every report except ITRR.</p> <p>We decided to switch from AirDNA to Key Data. For STR reports, you can see occupancy noted in the first marketing method. For ADR, in June of 2022 it was \$185.48 and in June of 2023 it was \$188.13. For ITRR, we grabbed reports as necessary when needing to find data about visitation to Montana and Missoula and visitor spending.</p> <p>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.</p> <p>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.</p> <p>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.</p> <p>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. While we didn't use Zartico this year, we did a visitor profile study as part of our Destination Stewardship Plan and gleaned lots of information about why visitors are coming to Missoula, visitor demographics and how visitors perceive Missoula compared to similar destinations. This information will be very helpful in developing future successful marketing campaigns.</p> <p>Key Data provided information about occupancy and ADR for Airbnbs and VRBOs. For ADR, in June of 2022 it was \$198 and in June of 2023 it was \$206. For occupancy, in June of 2022 it was 55.4% and in June of 2023 it was 55%.</p>	<p>We met our objective. Our marketing method was successful. Using data from various research sources informs decision making for ad placement, marketing to in state visitors versus out of state visitors and reaching the type of visitors we want to see in the community, such as responsible travelers.</p>
<p>Redefine KPIs (Key Performance</p>	<p>Complete Destination Stewardship Plan in order to</p>	<p>Our KPIs have not yet been determined. The Destination Stewardship Plan will be completed in</p>	<p>We did not meet our objective. This marketing method will be successful</p>

Indicators).	redefine future KPIs.	December 2023 and then we will redefine our KPIs.	when we have completed our Destination Stewardship Plan, which is slated for December 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.
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DMO Budget

Allowable Methods	Amount Budgeted	% of Budget Allocated	Amount Expended	% of Budget Expended
Administration	\$90,589.00	12.9	\$90,588.96	100.0
Agency Services	\$18,000.00	2.56	\$18,000.00	100.0
Earned Media/Tourism Sales	\$100.00	0.01	\$0.00	0
Education/Outreach	\$9,900.00	1.41	\$11,434.48	115.5
Marketing Resources	\$31,750.00	4.52	\$20,850.00	65.7
Opportunity Marketing	\$67,050.00	9.54	\$5,613.99	8.4
Paid Media	\$207,185.00	29.49	\$117,730.25	56.8
Product Development	\$10,000.00	1.42	\$0.00	0
Research	\$114,000.00	16.23	\$105,000.00	92.1
Visitor Services	\$112,975.00	16.08	\$110,288.80	97.6
Website Development (Online, Website, Mobile)	\$41,000.00	5.84	\$41,000.00	100.0
	\$702,549.00	100.00	\$520,506.48	

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.

Reg/CVB Required Documents

Description	File Name	File Size
Board Approval of the FY 22-23 Bed Tax Marketing Plan and Budget	April Board Minutes.pdf	296 KB
Destination Missoula By-laws	Bylaws 2016 (Destination Missoula)(final).doc	180 KB
Certificate of Compliance	Certificate of Compliance.pdf	59 KB
Destination DMO Plan	DM_2022- 23_Marketing_Plan_042922_FINAL.pdf	23.8 MB

