



Grant Details

125123 - FY24 DMO Plan

128728 - FY 24 Glacier Country DMO Plan

DOC Office of Tourism

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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.

Glacier Country Regional Tourism Commission (Glacier Country Tourism or GCT) is the officially recognized destination organization (commonly referred to as destination marketing and management organizations or DMOs) for our region. GCT, along with our in-region partner convention and visitor bureaus (CVBs), are essential to the economic and social wellbeing of the communities we represent, driving direct economic impact through the visitor economy and fueling development across the entire economic spectrum by creating familiarity, attracting decision-makers, sustaining air service and improving quality of life for the people who call this place home.

Historically, people have thought about the hospitality industry with hotels and restaurants front and center, or they have thought it's all about visitors in general, with specific segments of visitors prioritized. While these are understandable and important, destination organizations were originally created to provide opportunities for residents by creating demand for visitor experiences, which brings new revenue into our communities, stimulating economic development through business and job growth.

Our organization serves a greater purpose than we once did, and in 2022 we expanded the description of who we are. We completed a community-driven process to assess the current state of our regional tourism industry. We developed a strategic plan by working in partnership with the 75+ communities in the Glacier Country region to proactively map the evolution, development, marketing and management of the destination 10 years into the future. Glacier Country Tourism is leading this effort to identify ways to protect, improve and enhance the region's long-term quality of life and economic prosperity.

As tourism has grown worldwide, many destinations have failed to plan for sustainable growth and encountered adverse effects on their communities and natural resources. Western Montana continues to see robust visitation. Glacier Country Tourism acknowledges the positive impacts tourism has, increasing the overall quality of life for residents. But GCT also acknowledges that tourism adds pressure to the economic challenges Western Montana already faces, including infrastructure, affordable housing and workforce. With tourism serving as the largest state economic driver outside of agriculture, there is significant interest in how a stronger and smarter tourism industry might help mitigate these impacts. Glacier Country Tourism's Destination Stewardship Strategy provides the community and tourism industry with a 10-year action plan for responsibly stewarding our destination and promoting the economic health of our region.

During this process, we identified our communities' shared values, which are appreciated at an individual level and shared by the communities. Community values are the non-negotiable core principles or standards a community's residents wish to maintain. Community values guide the community's vision, mission and strategic plan as well as its goals, objectives, activities, capital projects, budgets and services. Our strategic plan aligns with and supports our shared values with each community.

Destination stewardship is critically important to ensure Glacier Country's tourism economy remains an economic engine for all Montanans. As tourism continues to recover globally from the pandemic slowdown and people travel in greater numbers domestically and internationally, the tourism industry's long-term viability depends on its ability to protect, preserve and promote the traveler experience in tandem with quality of life for residents.

OUR DESTINATION

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

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

- Geographic size: 22,000 square miles
- Population: 380,000
- Largest communities: Missoula, Kalispell, Whitefish and Hamilton
- Average February temperatures: High of 39 degrees Fahrenheit and low of 31 degrees Fahrenheit
- Average July temperatures: High of 84 degrees Fahrenheit and low of 51 degrees Fahrenheit
- Tribal Nations: Blackfeet, Kootenai, Pend d'Oreille, Bitterroot Salish
- Rural Travel Corridors:
 - Bitterroot Valley: Lolo, Florence, Stevensville, Victor, Corvallis, Hamilton, Darby, Conner, Sula
 - Blackfoot Corridor: Bonner, Clinton, Greenough, Ovando
 - Clark Fork Corridor: Dixon, Paradise, Plains, Thompson Falls, Trout Creek, Noxon, Heron, Hot Springs
 - East Glacier Corridor: Browning, Cut Bank, East Glacier Park, Heart Butte, St. Mary, Babb
 - Flathead Corridor: Arlee, Ravalli, St. Ignatius, Moiese, Charlo, Ronan, Pablo, Polson, Big Arm, Elmo, Dayton, Proctor, Rollins, Lakeside, Somers, Bigfork
 - Glacier National Park Surrounding Area: Babb, Columbia Falls, Coram, East Glacier Park, Essex, Hungry Horse, Martin City, Polebridge, St. Mary, West Glacier
 - I-90 Corridor: Frenchtown, Huson, Alberton, Superior, St. Regis, De Borgia, Haugan, Saltese
 - Northwest Corridor: Marion, Kila, Libby, Troy, Yaak, Rexford, Eureka, Fortine, Trego, Stryker, Olney
 - Seeley Swan Corridor: Bigfork, Ferndale, Swan Lake, Condon, Seeley Lake

STRENGTHS AND OPPORTUNITIES

Our strengths and opportunities as a travel destination include all that our brand pillars describe: spectacular unspoiled nature, vibrant small towns and communities that serve as gateways to natural wonders, and breathtaking experiences by day and relaxing hospitality at night. And, of course, we have all the amazing people who live here to provide the warm Montana hospitality we are so well known for.

The bountiful experiences we have are available to all who live and visit. Each and every one of our 75+ communities has a personality as special and unique as the others.

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

We will support local leaders with the knowledge they need to address the challenges they face and provide opportunities for the growth and change they desire for their community's future. We will help community managers and policymakers

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

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

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

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

CHALLENGES

In 2022, we worked with our communities and partners to take a fresh look at what our challenges are through our destination stewardship strategic planning. The bulk of the process involved various ways we could engage and learn from the residents and stakeholders of our region. How we address the identified challenges is yet to be determined, but we do not intend to operate from behind the scenes. We will continue to stay informed and engage with partners on the latest issues and leverage available resources when possible and appropriate. These resources include accuracy in our brand messaging and imagery used; staying abreast of new marketing trends and opportunities; maintaining a positive tone and message in our publicity and social media efforts; working with our partners to understand the concerns and impacts our industry has at a local, statewide and national level; and assisting financially, when possible, while knowing that our ultimate mission is to create demand for the tourism product our businesses and communities supply.

Identified Challenges (download full plan for details)

1. Diminishing resident sentiment toward tourism
2. Community capacity
3. New recreationists and poor visitor behavior
4. Affordable housing
5. Workforce shortages
6. Vehicle reservation system awareness in Glacier National Park
7. Over-capacity visitation of Glacier National Park during non-reservation hours
8. Recovery of international travel
9. Recovery of meetings and conventions
10. Diversity, Equity and Inclusion
11. Airline challenges
12. Climate change/changing landscape/weather
13. Crisis management, outreach and traveler education
14. Fluctuations in economy
15. Emerging markets
16. Public lands infrastructure and maintenance issues
17. International issues

18. Market competition
19. Public transportation
20. Shared economy accommodations
21. Algorithm changes and expanded privacy laws
22. Broadband infrastructure and Wi-Fi
23. Federal government closures
24. Federal and tribal land closures
25. DMO funding for sustainable destination stewardship and development
26. Perception of Glacier National Park being closed when the Going-to-the-Sun Road isn't open in its entirety
27. Destination marketing and management organization awareness

WHO WE WISH TO ATTRACT

Glacier Country Tourism first and foremost respects the lifestyle our residents treasure. We want to attract people who seek to enjoy the experiences available in the various corridors of our region and value our natural resources and the people who call Glacier Country home. We wish to attract visitors who provide financial value to our local communities while having the optimal social and environmental impact for that community. Through our destination stewardship planning process, we have learned that visitor “value” does not mean high spending—it means a visitor who aligns with the interests and characteristics of the people who live in the community. No longer does a one-size-fits-all strategy work for a region that is home to 75+ communities in eight counties.

According to ITRR, Glacier Country receives the highest number of both day trips and overnight trips of all travel regions in Montana at 28%. Our region is a top destination for not only nonresident visitors but residents from across the state. The ability to actively communicate with residents in Montana is a game changer as we address strengths, weaknesses and opportunities moving forward. Of the residents of Glacier Country surveyed in our Destination Stewardship Resident Survey, 82.3% of respondents would strongly welcome visitors from Montana to their community compared to 66.3% of those surveyed welcoming Canadians, 62% international visitors outside of Canada and 59% out-of-state U.S. travelers. Our communities clearly prefer that we invite fellow Montanans to visit, which prior to the pandemic was not allowed using lodging tax dollars.

For the past few years, communities in all but one of our eight counties have felt a huge influx in the number of visitors in July and August. Prior to the pandemic, only the communities around Glacier National Park reported feeling this. Combine high visitation with housing and workforce issues, many residents are frustrated. Service providers are exhausted and look forward to seasons with a more manageable number of people visiting. Many businesses are seasonal, so when the summer season ends, they close down until the next summer season begins. When asked if they felt shoulder seasons should be promoted more, we received mixed responses from business owners, with some saying yes as it would help keep and retain employees longer and others saying no because they need a break and want time to recoup or take a vacation of their own. Communities with year-round services have reported the number of visitors at a manageable level or said they could accommodate more.

WHY THEY COME

Within the boundaries of Glacier Country exists an endless array of activities, from thriving arts and cultural offerings to exhilarating adventures and authentic western experiences.

Our 75+ charming communities are surrounded by stunning landscapes and wide-open spaces, lodging and amenities are top-notch, and the local allure—including the extraordinary people who call this place home—cannot be found anywhere else, bringing travelers back again and again.

People come for the wide-open spaces, low population densities and to experience our laid-back quality of life and outdoor recreation. Western Montana has become a top destination. It should be noted that the region is also

experiencing increased pressure due to the popular television series Yellowstone.

DESTINATION STRENGTHS

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

2. Align with Montana Brand

Briefly describe how your destination aligns with the Montana Brand.

Glacier Country Tourism's brand is firmly integrated with the Montana brand. Our offerings—specifically nature, communities and welcoming residents—blend together to provide services and experiences that help share our marketing messages, while effortlessly aligning with our three brand pillars.

- More spectacular unspoiled nature than anywhere else in the lower 48 states
- Vibrant and charming small towns that serve as gateways to the state's natural wonders
- Breathtaking experiences by day and relaxing hospitality at night

More importantly, it is the many Montanans who deliver genuine and authentic experiences that help turn our first-time visitors into return visitors.

- We are simple, but not unsophisticated.
- We are confident, but not arrogant.
- We are genuine, but not old-fashioned.
- We are grounded, but not stuck in our ways.

Our storytelling allows the imagery of Montana to do the talking. We support the spectacular landscape with subsets of alluring small towns, approachable activities and distinctive things to see and do.

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).

OUR AUDIENCES

Glacier Country wants to attract people who first and foremost respect the people who live here and the lifestyle we treasure. We welcome those who seek to enjoy the experiences available in our region as long as they value and take care of them as we do. Our communities enjoy the visitor spending, which stimulates our economy and provides opportunity for growth. Sustainable growth relies on the alignment of interests and characteristics of those who live here and those who are visiting.

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

- Sustainable traveler
- Leisure traveler
- Geo-tourist
- Active mature
- Families
- Repeat visitors to Montana
- International traveler
- Domestic group tours
- Business traveler
- Meetings and conventions
- Reunions and weddings
- Higher education
- Health care
- Winter enthusiasts
- Music lovers
- Filmmakers
- Seasonal visitors

DEMOGRAPHICS

- Individuals – Mid-30s+, HHI \$75,000, college graduate, active and affluent, take at least two vacations per year, may be traveling in groups of two or more, in-tune with nature
- Mature geo-traveler couples – 55+, HHI \$75,000, active and affluent, high-value low-impact couples, may be traveling as groups with other friends and/or extended family
- Families – Multigenerational travelers, 1children under age of 18, HHI \$75,000, active and affluent, in-tune with nature
- Repeat Montana target traveler – Has previously visited Montana. Very likely to vacation within U.S. in the next 12 months. Average age 50. HHI \$125k. In-tune with nature. Preserving the environment.
- Groups – Affinity or corporate groups that are active and appreciate gathering and taking part in our unique environment

GEOGRAPHICS

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

PSYCHOGRAPHICS

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

3b. What research supports your DMO strategy?

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

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

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

2021 NONRESIDENT VISITATION, EXPENDITURES & ECONOMIC IMPACT ESTIMATES

by Kara Grau, Institute for Tourism and Recreation Research

- In 2021, 12.5 million nonresident visitors to Montana spent an estimated \$5.15 billion in the state.
- This \$5.15 billion in local spending directly supports \$4.42 billion of economic activity in the state, and supports an additional \$3.14 billion of economic activity, indirectly.
- The estimated total contribution of nonresident spending to Montana's economy was \$7.56 billion in 2021.

2021 CONTRIBUTION OF NONRESIDENT TRAVELER EXPENDITURES IN GLACIER COUNTRY TRAVEL REGION

by Kara Grau, Institute for Tourism and Recreation Research

- 2021 estimates of spending in Glacier Country by nonresident visitors to the state totaled nearly \$1.2 billion.
- This \$1.2 billion in local spending directly supports \$1.06 billion of economic activity in the region, and supports an additional \$834.9 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$1.9 billion.

2021 GLACIER COUNTRY VISITOR CHARACTERISTICS

by Institute for Tourism and Recreation Research

Average Length of Trip: 6.4 nights

- Hotel/Motel: 36%
- Home/Condo/Cabin of Friend/Relative: 18%
- Private Campground: 16%
- Public Land Camping: 11%
- Rented Entire Cabin/Home: 8%
- Average Group Size: 2.3 people
- Average Age: 54 years old

Reasons for Trip

- Vacation, Recreation, Pleasure: 62%
- Visit Friends/Relatives, Attend Family Event: 20%
- Just Passing Through: 12%
- Business Travel: 4%

Activities on Trip

- Scenic Driving: 57%
- Day Hiking: 57%
- Wildlife Watching: 39%
- Nature Photography: 37%
- Car/RV Camping: 33%
- Recreational Shopping: 25%
- Visit Local Brewery: 26%
- Visit Historical Sites: 21%
- Visit Museums: 17%
- Visit Lewis and Clark Sites: 17%
- Visit Indian Reservations: 11%
- Visit Farmers Markets: 10%
- Fishing/Fly-Fishing: 7%

Attracted to Montana for

- Glacier National Park: 36%
- Open Space/Forests: 16%
- Mountains/Forests: 12%
- Family/Friends: 8%
- Yellowstone National Park: 6%
- Skiing/Snowboarding: 4%

First-Time Visitors

- No First-Time Visitors: 69%
- All First-Time Visitors: 19%
- Some First-Time/Some Return Visitors: 12%

Trips Characteristics

- Flew on Portion of Trip: 15%

- Hired an Outfitter: 6%
- Own a Second Property in Montana: 3%
- Plan a Return Visit in Next Two Years: 79%

Residency of Travel Groups

- Washington: 21%
- California: 6%
- Oregon: 6%
- Idaho: 6%
- Florida: 5%
- Ohio: 5%
- Minnesota: 5%
- Wisconsin: 4%
- Colorado: 3%
- Arizona: 3%
- Texas: 3%

REGIONAL VISITOR TO RESIDENT RATIO (2022 VS. 2021)

ZARTICO

- Yearly Average: 38 visitors to 100 residents (up 5% over 2021)
- Seasonal Average:
 - January to March – 25 visitors to 100 residents (down 8% over 2021)
 - April to June – 34 visitors to 100 residents (down 8% over 2021)
 - July to September – 50 visitors to 100 residents (down 2% over 2021)
 - October to December – 42 visitors to 100 residents (up 56% over 2021)

REGIONAL LODGING DATA (2022)

SMITH TRAVEL REPORTS

- Average Daily Rate: \$150.91
- Occupancy: 60.2%

KEY DATA (2022)

- Average Daily Rate: \$275
- Occupancy: 35.7%

REGIONAL AIRPORT DATA (2022)

MISSOULA MONTANA AIRPORT (MSO)

- Enplanements: 424,945
- Deplanements: 419,067

GLACIER PARK INTERNATIONAL AIRPORT (FCA)

- Enplanements: 420,320
- Deplanements: 412,178

THE STATE OF THE AMERICAN TRAVELER IN MARCH 2023

by Destination Analysts

Americans will prioritize travel in their household income's spending in the coming months, over home improvements, clothing, entertainment and even dining out in restaurants.

Travel Tops Spending Priorities

Given the deserved attention on how economic conditions will impact the travel industry's performance this year, it is important to more fully understand how travel fits into consumers' priorities. We know travel is something that evokes strongly positive emotions, but where does it fit among many other beloved things people can choose to invest in? This month we asked 4,000 American travelers to think about how they expect to spend their household income in the next 12 months. Domestic leisure travel took the top spot, with 35% of American travelers saying that it will be a high or extremely high priority in their household spending this year. It beat out restaurants (32%), education (24%), home improvement (21%), clothing and accessories (20%) and entertainment (18%). Additionally, over 20% of American travelers said they would be highly prioritizing international leisure travel and 14% said they would be prioritizing luxury travel in their household spending. The prioritization of travel includes time as well as money. The typical American traveler reports having 15.9 days available for leisure travel this year.

Financial Concerns Still an Impediment But Travel Volume Strong

When asked what has deterred them from travel recently, 39% of Americans say travel prices are too high right now, 36% say gas is too expensive and 32% cite their personal financial situation. Yet while economic concerns continue to be an impediment to travel, travelers are feeling somewhat better off financially than they were a few months ago. Now, 30% say their financial situation has improved relative to a year ago and 47% expect to be better off next year relative to where they are now. Although the majority of American travelers (53.6%) still expects the U.S. will enter a recession in the next six months, fears of an impending recession continue to abate, sliding 10 points since last year. Fewer travelers are exercising spending caution due to concerns about a recession, down seven points in six months to 58%. Importantly, travel volume remains strong—50% took an overnight leisure trip in the past month and 89% of American travelers have existing trip plans right now. The outlook for the next several months looks bright as well. Americans' excitement for travel broke last month's record and reached another high (8.2 on a 0-10 scale). 43% of American travelers are back to prioritizing luxury travel and average expected annual travel spending hit \$4,677. Looking at our travel sentiment indices, current travel enthusiasm has been moving forward in the past two months, and expectations for future travel are at the levels they were a year ago. In perhaps another sign that Americans are feeling good, comedy unseated true crime as the top podcast genre among the 28% of American travelers who regularly consumer podcast content.

The Emergence of ChatGPT

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

Luxury Travel, Supporting Minority-Owned Businesses and Other Noteworthy Travel Trends

Some other travel trends to keep in mind include:

- 43% of American travelers say it is important for them to have at least one luxury travel experience when they go on a trip. This trend continues to hold strong after a dip in the second half of 2022.
- 35% prioritize supporting minority-owned business when they travel
- 16% used a travel advisor or travel agent to plan one or more trips in the past 12 months.

THE "REGULAR" CUSTOMER SEGMENTS ARE SHIFTING

by Tony Capuano, CEO, Marriott International, Inc.

At the start of pandemic recovery, industry leaders believed leisure travel would lead travel recovery, with business travel closely behind and group travel at a distant third, according to Capuano. While some of those predictions have held, others have shifted.

“Leisure travel continues to be exceedingly strong, and group travel has surprised to the upside,” he explained. “Business travel is perhaps the tortoise in this ‘Tortoise and the Hare,’ slow-and-steady recovery.”

However, Capuano noted customer segments are becoming less and less strictly defined.

“There’s this trend we’ve seen emerge over the pandemic of blended trip purpose ... where more and more folks are combining leisure and business travel,” he said. “If this has staying power, I think it’s absolutely a game changer, as we get back to normal business travel and hopefully maintain that leisure travel.”

To accommodate this shifting demand, Marriott has focused on expanding offerings to accommodate both the business and leisure sides of travelers’ trips.

“We’ve had a very big focus on expanding bandwidth, so that if we’ve got 300 rooms full of guests on Zoom calls simultaneously, we’ve got the bandwidth to cover it,” Capuano added. “We’re also being more thoughtful about fitness, leisure, and food and beverage offerings—and having the flexibility to pivot those offerings as somebody sheds their business suit on Thursday and changes into shorts and flip flops for the weekend.”

THE STRONG PERFORMANCE OF THE SPORTS TOURISM SECTOR AND RISING RESIDENT SENTIMENT OF SPORT

White Paper by Sports ETA and Longwoods International JANUARY 30, 2023

Our report shows that it’s important to raise awareness for the events within the communities and prioritize local participation so residents feel they have a “stake” in the events. This can be achieved by involving local residents as volunteers for the events and working with local media partners for PSA campaigns to promote the events.

Another suggestion is to develop events that are true assets for the community. Sports tourism should be able to use existing infrastructure, generate consistent visitor numbers and use the sporting events to improve the quality of life as well as the economic base of the host community.

In summary, the pandemic brought new opportunities for nontraditional, individual and outdoor sporting activities as Americans looked at health and wellness with a new perspective. As sports tourism continues to flourish, communities have the opportunity to maximize resources, enhance quality of life and add to the area’s economic bottom line.

NEW STUDY REVEALS THAT COMMUNITY ALIGNMENT IS TOP PRIORITY FOR DMOS POST-PANDEMIC

by Jim McCaul, SVP, Destination Stewardship JULY 2021

Like so many things, the COVID-19 pandemic has accelerated the need for broader alignment between stakeholders in our destinations. Reduced resources, shifting consumer and lifestyle trends, and multifaceted systems approaches to destination management are all driving this acceleration.

Many of the top strategies identified in the study center around the need for stronger community alignment. For example, one of the top DMO strategies is to “enhance engagement with the local community to manage future considerations for the visitor economy.” However, this is not easy to accomplish in the short term. Building a coalition among the public and private sectors to move a destination toward a common goal requires engaging many different audiences with opposing agendas.

One effective way to align the goals and initiatives of a multitude of destination stakeholders is to develop a shared vision for the future of the destination. Such a vision provides an overarching goal that allows stakeholders to break out of their

bounded rationality.

DESTINATION STEWARDSHIP

by Samantha Bray, MARCH 26, 2021

As we look to a post-COVID-19 recovery, care for communities that make up the fabric of destinations is critical. But how? A destination stewardship approach can help tourism stakeholders—including community members—create their shared future in a collaborative and mutually beneficial way. Translating the concept of destination stewardship to action requires a structure that supports bringing all of the stakeholders around the table. It also requires giving them a real voice in tourism planning, policy and management.

AMERICAN RESIDENT SENTIMENT TOWARD TOURISM – HIGHLIGHTS FROM THE 2021 AMERICAN RESIDENT SENTIMENT STUDY

by Longwoods International

The travel and tourism industry has been challenged by the coronavirus for nearly two years, with the impact of the pandemic ranging from challenging to catastrophic. But even before the pandemic, the industry was increasingly in the spotlight, as communities debated the pros and cons of hosting visitors, weighing the jobs and revenues tourism provides against potential overcrowding and even environmental concerns.

The pandemic has presented an opportunity for the tourism industry to demonstrate the importance of travel and tourism to local economies. Americans favor tourism development and growing the number of tourists coming to their areas, with half supporting an increase in the number of visitors while a quarter do not favor more visitation.

Americans generally support adding new events and new facilities in an effort to attract more visitors. But they are concerned that residents are not informed when such plans are underway, with 42% saying they are not consulted when major developments are underway, while 32% say they are in the loop on such developments.

The major takeaways from this research are that first, there is broad support for the travel and tourism industry across the country. However, there exist areas for attention by the industry:

- The need for better resident engagement around topics of public concern.
- The industry should pay attention to public concerns about specific issues, including opinions on the public use of lodging tax revenues and disruptions to neighborhoods by lodging sharing services.
- Residents feel largely left out of the conversation on tourism development.
- There is a need to grow communication with residents to ensure they are part of the conversation about tourism development and feel informed.
- Gen Z needs to be included in the conversation and engaged with the tourism industry to develop an understanding of the value of travel and tourism.

GLACIER COUNTRY RESIDENT SURVEY (2021)

by MMGY NextFactor and Better Destinations Glacier Country Tourism Destination Stewardship Strategic Planning

Residents were surveyed on a scale of 1 (poor) to 10 (excellent). When asked how they would rate their quality of life compared with other places in Montana, the average answer was 8.5. When asked how they rate their quality of life compared to other places in the United States, the average answer was 8.9. While the majority of respondents agreed that tourism creates good employment opportunities for residents and opportunities for new businesses, creates revenue for local businesses, brings diversity to the region, is an important factor in making communities a great place to live and supports amenities and attractions that local residents also enjoy, they also equally agreed that it makes property and housing prices more expensive and negatively impacts our natural resources and infrastructure.

Overall, most agree that Glacier Country has too many visitors during the summer and about the right amount in fall, winter and spring, with those numbers varying by county.

MONTANA RESIDENTS: ATTITUDES TOWARDS TOURISM 2022

by Carter Bermingham, Megan Schultz, Matthew Pettigrew and Glenna Brown, Institute for Tourism and Recreation Research

For the second year in a row, results from this survey indicate residents demonstrate a balanced attitude and understanding of the tourism industry within the state. A majority of respondents agree that the promotion of the tourism industry by the state benefits their community economically (80%), while also agreeing that the overall benefits outweigh the negative impacts (66%). At the same time, a majority of respondents also agree that the state is becoming overcrowded because of more tourists (50%), while just 35% of respondents agree that if tourism were to increase, the quality of life for residents would improve.

Results indicate that residents are fully aware of the economic benefits tourism provides, while also recognizing these gains may come with some costs. One of the more notable trends is the shrinking number of Montanans who agree that if tourism were to increase the overall quality of life for Montana residents would improve (-36% since 2019). Results from 2022 show that, for the second year in a row, more respondents disagreed with this statement than agreed.

When analyzing findings by travel region, results show a reversal from trends in recent years. Traditionally, respondents from Southeast Montana, Missouri River Country and Central Montana were less likely to agree on topics like overcrowding as well as the benefits tourism provides, particularly in comparison to other regions of the state. However, in 2022, those travel regions are now more or at least equally likely to agree that the state is becoming overcrowded, while also recognizing that the economic benefits of tourism outweigh the negatives.

Lastly, in a year that saw record damage as a result of natural disasters in the state, less than half (42%) of respondents agreed that their community is prepared for a natural disaster. Similarly, less than half (49%) of respondents agreed that their community has the necessary amenities needed to support the tourism industry.

3c. What are your emerging markets?

OUR EMERGING MARKETS

We view emerging markets a little differently these days. During 2020, we saw a new visitor to our region—one who was new to rural Montana and outdoor recreation. We also saw an influx of people moving to Montana who are new to living and working in rural communities. Both these markets are targets of our Recreate Responsibly messaging.

Our communities have changed their target customer a bit—they seek “preferred” visitors over “high value” visitors, with each community/county identifying the preferred visitor a little differently. For example, no longer is a high-spending visitor on the preferred list; preferred visitors are respectful of the people who live here and respect our natural resources, and high spending visitors are perceived less likely to be so. We also heard loud and clear that Montanans, Canadians and international visitors are viewed as preferred visitors. We will work hard to increase the rate of return for these segments.

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 goal is to balance a thriving visitor economy with the long-term health and vibrancy of our communities.

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. Continue to execute and expand community engagement and the destination stewardship program.
7. Track values-based marketing performance.

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

DESTINATION MARKETING 36% TIME INVESTMENT

Consumer Messaging: Glacier Country Tourism's messaging strategy is based on season, capacity of the community/travel corridor and visitor experiences available. Depending on the targeted audience, our message will vary. A common theme of our messaging is to recreate responsibly. As an example, our 2022 and 2023 winter campaign was Winter Wisely. It promoted Western Montana as a vacation destination, while reminding visitors to plan ahead and play it safe. "You can shred the slopes and have a ball in the snowfall, but stick to activities that match your skill level, tread lightly, and be kind and respectful in our communities. Go wisely, recreate responsibly, and leave nothing but tracks in the snow." Our in-state campaign encouraged Montanans to explore their own backyard. The campaign, We Live in a State of Awe, acknowledged the economic impact resident visitors contribute to Montana communities. Additionally, residents are often welcomed visitors to our small towns, which appreciate the friendliness and the respect for the community, people and natural resources that in-state travelers tend to have. Our meeting campaign invited meeting planners to Meet in Montana, Experience a State of Awe. Our destination weddings campaign inspired couples to Get Married in a State of Awe. All campaigns promoted activities during a time of year when our communities desire visitation, but each had a slightly different message based on the intended audience.

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

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

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

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

The benefits to local communities from the film and entertainment industry are considerable. When a production shoots on location, it brings jobs, revenue and related infrastructure development, providing an immediate boost to the local economy. Beyond these immediate impacts, productions that take place in Montana play a critical role in helping to shape the cultural image of the state. Film-induced tourism can affect travel decisions when potential tourists plan their upcoming holiday or visit to a destination. Films, documentaries, TV productions—like the "Yellowstone" series—and commercials inspire people to experience locations seen in the content screened and explore new destinations.

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

Communications: Our communications program develops, manages and monitors our publicity and earned media projects and programs. Every year, our publicity efforts result in strong performance with both travel writers, travel bloggers and digital influencers. We plan to continue our efforts with a support budget for trade media shows, media events, press trips and familiarization funding to be flexible and responsive for those we host and those we promote.

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

Destination Stewardship: The core deliverable for our destination stewardship program is a new strategic framework with five high-level goals and actionable initiatives for each to accomplish the vision for Glacier Country Tourism. The goals are interdependent and designed to collectively optimize the year-round economy and enhance the local community character and cultural DNA. The five strategic pillars are: be an advocate for Western Montanans, encourage responsible tourism and recreation, enhance experiences in rural communities, shape demand and disperse visitors,

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

DESTINATION MANAGEMENT 23% TIME INVESTMENT

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

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

During the COVID-19 public health crisis, spending time in outdoor spaces became more popular than ever. We joined the Recreate Responsibly movement, which provides guidelines that offer a starting point for getting outside and minimizing impact on natural resources. Together with Glacier National Park; Montana Fish, Wildlife & Parks; Flathead National Forest; Montana Office of Tourism; Discover Kalispell and Explore Whitefish, Glacier Country Tourism launched "Recreate Responsibly in MT," an initiative that guides and informs those recreating in our state to be good stewards of Montana's people, cultures and land. The messaging targets visitors, residents and businesses, providing education and tools for best practices on how to minimize impact, leave no trace, know before you go, prevent wildland fires, stop aquatic invasive species and travel safely. Building upon messaging from RecreateResponsibly.org, the Leave No Trace Center for Outdoor Ethics, and Tread Lightly, our efforts include resources available to businesses throughout the state as well as marketing and messaging targeted at travelers and recreators. This messaging is included on webpages, airport signage, statewide television and radio advertising, billboards, fuel media video PSAs, rack cards, trailhead signage, social media advertising and posts, videos and a Recreate Responsibly "tourism pledge" visitors and residents can sign.

DESTINATION STEWARDSHIP 28% TIME INVESTMENT

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

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

Community Outreach Program: Glacier Country Tourism will continue to develop our community engagement and destination stewardship program to build public support around a shared vision for the destination—balancing economic development, sustainable tourism and quality of life. We have dedicated staff to implement our destination stewardship plan, including the January 2023 hire of a Director of Community Engagement and Destination Stewardship. As awareness of the tourism industry grows, positive and negative perceptions of it also grow. Montana's destination organizations, including Glacier Country Tourism, have mostly operated behind the scenes without telling our own story—

sharing what we do, how we do it, why we do it and how we measure our success with qualitative and quantitative metrics.

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

DESTINATION DEVELOPMENT 13% TIME INVESTMENT

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

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Objectives/Metrics/Evaluation

Objectives	Measurable Metrics for Success	Report the Metric Achieved	Evaluation of Measurable Metrics for Success
DESTINATION MARKETING + DESTINATION MANAGEMENT OBJECTIVES	We will measure performance of messaging tactics and track year-over-	-	-

<p>It is important to track effectiveness of our sales and marketing programs, so we will monitor the performance of our paid media, social media, webpage analytics, earned media/digital influencer reach and ad value, B2B leads, call center and travel guide performance.</p>	<p>year comparisons against FY 2023.</p> <ul style="list-style-type: none"> • Increase use of responsive webpage by 5% • Continue social media audience growth by 2% • Increase consumer leads database by 2% • Increase blog readership by 5% • Increase digital travel guide readership by 5% • Track overall paid media performance using KPIs of impressions delivered, engagement rate and cost per engagement • Increase B2B leads by 4% • Track earned media ad value and readership/impressions delivered • Track conversion rate of people who both visited our website and physically visited Glacier Country <p>We will continue Recreate Responsibly messaging to minimize the negative impact of visitation on our communities.</p> <ul style="list-style-type: none"> • Track overall media performance using KPIs of impressions delivered, engagement rate and cost per engagement • Conduct a biannual survey with residents of Glacier Country to track if we are building awareness of the message 		
<p>DESTINATION STEWARDSHIP, DESTINATION DEVELOPMENT + DESTINATION MANAGEMENT OBJECTIVES</p> <p>We will continue our destination stewardship program. A critical part of destination stewardship is community engagement. To ensure the level of engagement we have done continues, we will create a program that is focused on the execution of the community-driven destination stewardship strategic plan (completed in fall 2022). This program will take what we learn and put the destination development funding to work to tackle the challenges and opportunities that exist. Much of the work under this program is based on what</p>	<p>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.</p> <ul style="list-style-type: none"> • We hired a Director of Community Engagement and Stewardship. • We will use Zartico to track and visually display various data sets that Glacier Country Tourism and our communities have identified as useful and critical. The data from FY 2023 will provide baseline data 		

our communities have identified they need from us for creating solutions.

we can compare against moving forward.

- Track workforce trends by monitoring jobs available, unemployment rate and average income
- Track affordable housing by monitoring median household income compared to median residential home price and median rent by county
- Track impacts of short-term rentals on our communities by tracking the rate of short-term rental growth in the region, number of available units, occupancy and average daily rate by region and county
- Track resident sentiment toward tourism using resident sentiment survey data from ITRR and Glacier Country Tourism
- Track visitation trends using data from ITRR and Zartico beginning 2022; data will include top spending markets, visitor spending, visitor dispersion, percent of in-state/out-of-state/resident travel compared to total device count
- 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
- Track visitor-to-resident ratio in the region and by county

DMO Budget

Allowable Methods	Amount Budgeted	% of Budget Allocated	Amount Expended	% of Budget Expended
Administration	\$730,000.00	15.0	\$0.00	0
Agency Services	\$575,000.00	12.0	\$0.00	0
Cooperative Marketing	\$50,000.00	1.0	\$0.00	0
Earned Media/Tourism Sales	\$425,000.00	9.0	\$0.00	0
Education/Outreach	\$170,000.00	4.0	\$0.00	0
Joint Venture	\$150,000.00	3.0	\$0.00	0
Marketing Resources	\$80,000.00	2.0	\$0.00	0
Opportunity Marketing	\$150,000.00	3.0	\$0.00	0
Paid Media	\$945,000.00	20.0	\$0.00	0
Marketing Personnel	\$327,000.00	6.0	\$0.00	0
Product Development	\$570,000.00	12.0	\$0.00	0
Research	\$160,000.00	3.0	\$0.00	0
Travel/Trade Shows	\$100,000.00	2.0	\$0.00	0
Visitor Services	\$264,000.00	5.0	\$0.00	0
Website Development (Online, Website, Mobile)	\$150,000.00	3.0	\$0.00	0
	\$4,846,000.00	100.00	\$0.00	0.00

Narrative Evaluation

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DMO Plan Attachments

Description	File Name	File Size
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Reg/CVB Required Documents

Description	File Name	File Size
Board Minutes (March 2023)	23 03 Board Meeting Minutes FINAL.pdf	68 KB
FY24 Annual Certificate of Compliance	FY24 Annual Certificate of Compliance.pdf	34 KB
GCT Board Manual - Bylaws & Policies	GCT Board Manual - FINAL March 2021.pdf	293 KB

