



DESTINATION  
*Missoula*  
MONTANA

2022 - 2023

**DMO PLAN**

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## PREFACE

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As we enter the third year of the pandemic, indications are that we are through the worst of the physical toll of the previous two years. Life is returning to “normal” with the availability of vaccines, allowing for less social distancing and masking. Pent up energy around travel, attending events and conferences is on the rise and all indications are that Montana tourism will see another busy year.

And, although Montana has been lucky to see recovery of our industry sooner than many states, we are also dealing with unforeseen consequences. Especially in Western Montana, the sudden discovery of Montana has created a cycle of lack of affordable housing and available workforce, making it difficult for Montana businesses to service the influx of visitors and meet residents’ needs. In addition, the rise of inflation, the war in Ukraine, and political unrest, not only in the US but across the world, affects the industry and each of us individually.

Due to this, we are looking at FY 2023 as a year of transition. Although we will still need to remain flexible and resilient to meet unexpected challenges, we are also seeing the light of a new future at the end of the tunnel. The tourism industry has grown and evolved in the last few years in our understanding of our roles and responsibilities to our residents, as well as our visitors.



Destination Missoula, with guidance from internationally renowned MMGY NEXTFactor, completed an extensive three-year Strategic Plan in September of 2021. In addition to recognizing the importance of our traditional role of marketing to enhance year-round sustainable visitation, the boards of both Destination Missoula and the Missoula Tourism Business Improvement District reexamined the importance of our roles in our community in advocacy, management and stewardship of the assets and natural resources Missoula is blessed with. The importance of community alignment and our voice at the table around pressing issues such as affordable housing, workforce, childcare, transportation, and land management, etc., became central to our understanding of success in the future.

With this understanding, we created a new joint vision and mission for our organizations based on these values and tenants, and through this lens will be leading our community through a Destination Stewardship planning process this year to create a 10-year community driven vision for the future of Missoula tourism – the light at the end of the tunnel!



## MISSION STATEMENT

Promoting responsible and sustainable year-round tourism in Missoula and the surrounding areas.

DESTINATION  
*Missoula*  
MONTANA





THERE'S THIS PLACE...

## WHO WE ARE

### OUR ORGANIZATION

Destination Missoula is committed to promoting Missoula, Montana as a unique and transcendent destination. As we market Missoula we play to its strengths, of which there are a multitude, and look ahead to opportunities on the horizon. As a team, we keep our eyes open to inevitable challenges and work toward solving them efficiently and effectively. And we do it all with a foundation of pure gratitude that we get to live in and tout such an exceptional place.

Our organization is here for the visitors and residents of Missoula, as well as the natural spaces that make this place so special. We know that inspiration and education go hand-in-hand when it comes to promoting our destination, and our work continues to focus on the benefits of responsible, sustainable tourism. With many in the tourism industry, we also recognize that our role and responsibilities to both our residents and visitors are changing and to be good stewards of the place we love also means being a leading voice in management and development of our resources and industry assets.



# IDENTITY

## OUR VISION

A vibrant and inclusive quality of life, place and experience for our community and visitors.

## OUR MISSION

Promoting responsible and sustainable year-round tourism in Missoula and the surrounding areas.

## OUR DESTINATION

In a valley that unfolds at the confluence of three rivers and seven wilderness areas, Missoula, Montana is anything but ordinary. Here, nature inspires a philosophy of slowing your pace to mountain time, living out loud and taking it all in. Adventure is always top of mind in this paradise where recreation is second-to-none and a balanced and full life is priority number one.

We wish to attract people who identify with the Missoula way of life, even if just for a weekend. These are people who want to taste local cuisine, breathe fresh air and soak in the view. Most importantly, Destination Missoula aims to reach people who will respect, support and enjoy the community we've built. Lucky for us, Missoula has a knack for drawing in these adventurous yet conscientious visitors.

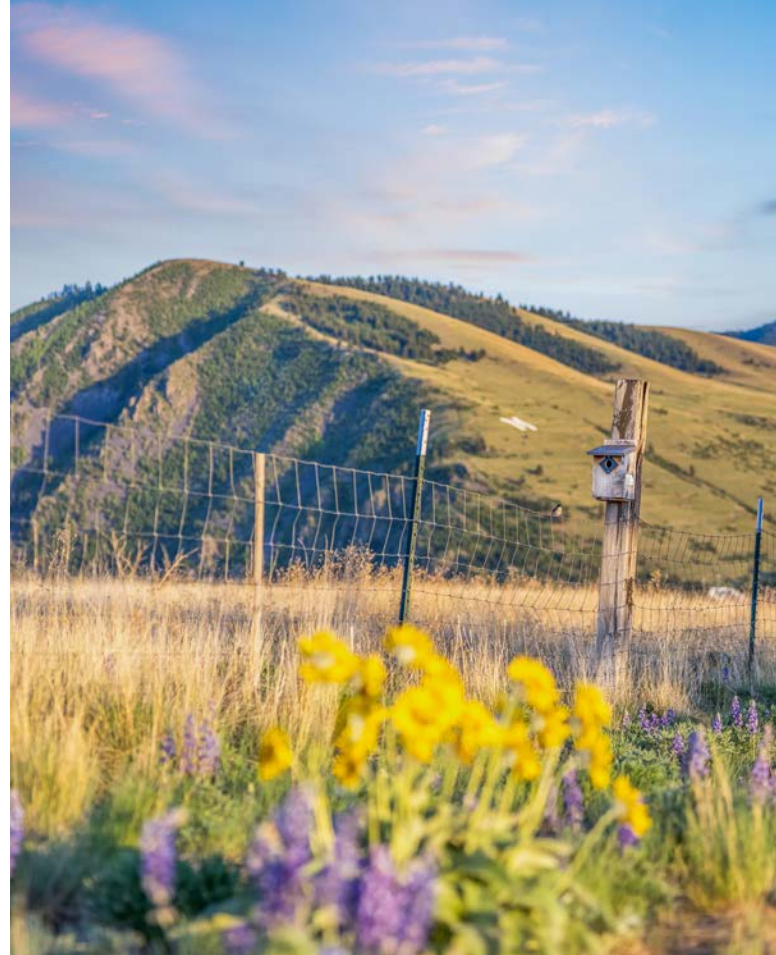
Missoula is the second-largest city in Montana, but to those visitors from large urban areas, Missoula is a vibrant, eclectic and authentic small town bursting with charm and personality, perfectly situated halfway between Montana's two awe-inspiring treasures—Glacier and Yellowstone National Parks.

Served by the Missoula Montana Airport and three major highways, Missoula is the ideal hub from which to explore the many wonders of Montana. Accessibility to world-class recreation makes Missoula an unparalleled place for outdoor exploration. Where else can you hit up one of the West's best farmers markets, kayak or river surf right downtown, and hike or bike an epically scenic trail in 60,000 acres of wilderness (and wash it all down with a finely-crafted Montana beer, good food and friendly conversation at a local brewery) all in the same day?

Missoula is also a regional destination for shopping and dining, featuring three distinct shopping districts and an abundance of eateries and places to drink—like fine dining, authentic steakhouses, food trucks, iconic taco joints, cafés, coffee shops, distilleries and taprooms—with something to fit all budgets and palates.

Missoula is Montana's most cosmopolitan and diverse community and the heart of arts and culture in the state, seamlessly blending contemporary culture and historical heritage. Visitors find this arts and cultural hub brimming with a seemingly endless array of entertainment and events. Think symphony, theater, film festivals, nationally recognized artists live in concert, author readings at independent bookstores, college sports, ballet, opera and even roller derby. And, Missoula proudly lives our history, from Native Americans and the Lewis and Clark Expedition to smokejumpers and Glacial Lake Missoula. Missoula is also a regional hub and state leader in commerce, education and health care.

Some might call it unique, cool or hip. Others will experience it as serene, welcoming and replete with natural beauty. Missoula is alive, pulsating with a unique small mountain-town spirit, offering pristine open spaces, places to go, incredible things to see and do and the best people around. Missoula's unique character is shown through marketing efforts, while incorporating brand fonts, colors and stunning, authentic imagery.





## OUR STRENGTHS

### ARTS AND CULTURE

Nurtured by nature, culture is alive and well in Missoula, home to the most diverse and extensive arts and music community in Montana. From writers to performing artists, from painters to photographers, from historians to museum curators, all are inspired by the beauty, charm and roots of their surroundings. Missoula is fortunate to be home to numerous famous and creative people who add a dimension and depth to the community that is usually only seen in larger cities. Regionally, nationally and, in many cases, internationally renowned, Missoula's cultural community creates an essence that urban travelers want but do not expect in Montana, making Missoula a surprisingly unique destination with an allure that draws visitors back again and again.

While the COVID-19 pandemic brought unprecedented hardship for Missoula's arts community, it also highlighted the incredible resilience and creativity of our artists, creators and organizations. Rather than succumb to shutdowns and setbacks, they responded to the pandemic with innovative new ways to engage the community, from streamed concerts to virtual gallery tours. The support we've seen for our arts in the past two years makes us more optimistic than ever moving forward.

### IMMEDIACY OF OUTDOOR ACCESS

In Missoula, the great outdoors really are right outside your door and a river really does run through it. On any given day anglers are gracefully casting in the Clark Fork River. Downstream, kayakers and river surfers perform athletic feats atop the man-made Brennan's Wave. Tubing is an alternative form of transportation in the summer as people ride the river right through town. Off the water, the trail system that crisscrosses the city keeps people grounded, and bicyclists ride on the country's friendliest streets. The surrounding hills and mountains offer a powder paradise for winter lovers, like backcountry and cross-country skiing, plus Montana's Snowbowl, providing downhill adventure right in Missoula's backyard. So, whether you run, ski, paddleboard, river surf, kayak, bike, hunt, fish, hike, backpack, float or camp, you can indulge your passion within minutes of the city center.



## REGIONAL HUB

Missoula is a regional center for retail, health care, education, forestry, ecology, transportation and culture. People come from across the state and region to shop in Missoula’s historic downtown boutiques and at Southgate Mall—Western Montana’s largest mall. The preeminent health care provided by renowned physicians and hospitals makes Missoula a center for Western Montana’s health care. Home to the University of Montana, Missoula hosts students from around the world who seek an education that is highly valued and recognized on a campus that is one of the country’s most picturesque. This level of education also produces a population of “top in the field” professionals who work in and serve our community. In order to support these industries, Missoula must also be a transportation hub. Missoula can be reached by two major highways—U.S. Highway 93 and State Highway 200—and Interstate Highway 90. The Missoula Montana Airport is currently undergoing a massive expansion project. Phase 1 was completed in 2022, providing more gates and accommodating more flights into Missoula. It currently hosts six major air carriers and has non-stop flights to the following destinations:

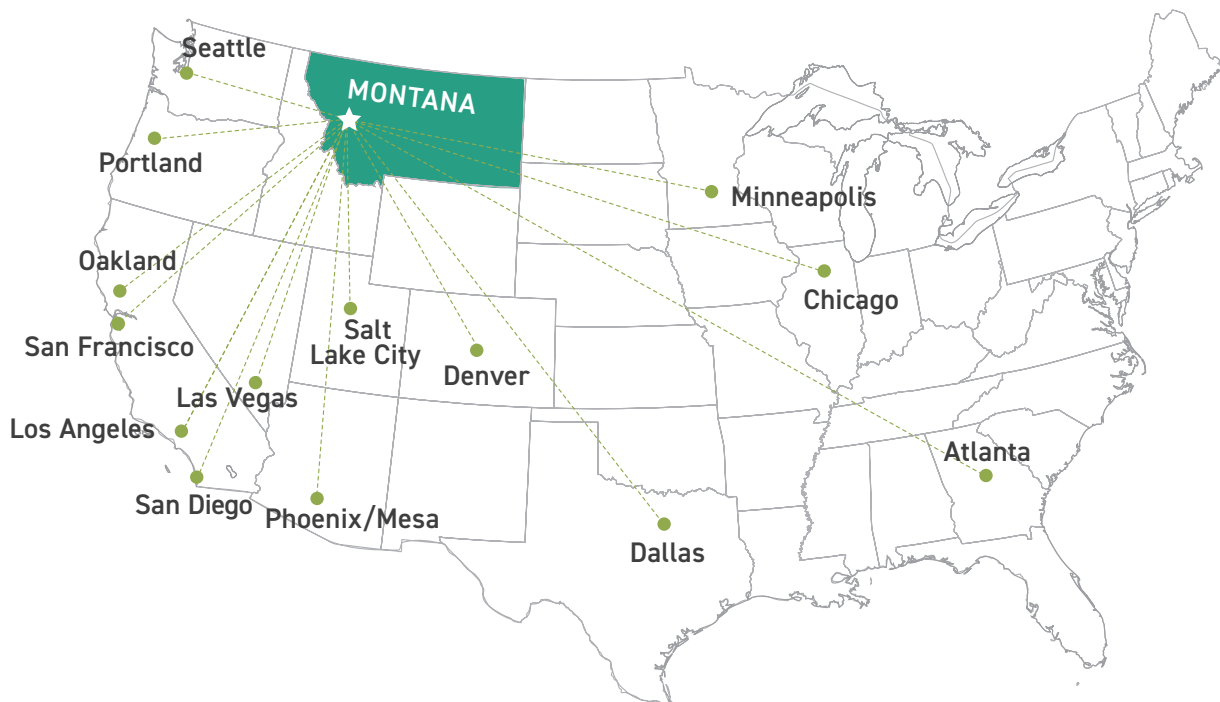


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## NON-STOP FLIGHTS TO MISSOULA

- SEATTLE
- PORTLAND\*
- MINNEAPOLIS/ST. PAUL
- SALT LAKE CITY
- OAKLAND\*
- CHICAGO\*
- DENVER
- SAN FRANCISCO
- LAS VEGAS
- LOS ANGELES
- ATLANTA\*
- PHOENIX/MESA
- DALLAS
- SAN DIEGO\*

\* SEASONAL NONSTOP FLIGHTS





## SPORTS AND ADVENTURE

In Missoula, we play long after the game is over because our outfield is endless. Our proximity to three pristine rivers and seven wilderness areas, and within 100 miles of five ski areas, means adventure is virtually limitless here. We’re a recreation hot spot where play is revered and where teams come together for the love of sport and play is nurtured by natural beauty and fresh mountain air. Missoula is also home to a Minor League Team—the Missoula Paddleheads, UM Griz sporting events and the world-famous Missoula Marathon. This Boston qualifying race ranks in the top 10 U.S. marathons year after year, grabbing the #1 spot in both 2017 and 2018 and remaining high on the roster with a #2 spot in 2019, #3 in 2020, and #1 in top 5 “race-cation” destinations by BibRave. Runner’s World was quoted as saying:

*“For Missoula, a ton of runners cited the community support being second to none,” said Jessica Murphy, cofounder of BibRave. “The entire town really comes out to support the race all weekend long.” Not only that, but the constant view of the mountains serves as inspiration for runners. This flat, Boston-qualifying course is sure to please.” (Runner’s World 2019).*

We look forward to future cycling events after Missoula successfully hosted the USA Cycling Collegiate Mountain Bike National Championships. Destination Missoula and the Missoula Tourism Business Improvement District worked for a number of years in close collaboration with USA Cycling to bring this opportunity into Montana. Through a close partnership with the biking community in Missoula and Destination Missoula’s proven track record with Missoula XC, Destination Missoula has been able to bring top collegiate athletes and future Olympians from across the country to compete in Missoula. By successfully hosting these events at the collegiate level, Missoula is now on track to successfully bid for USAC professional racing.

## Best Race-cations: Missoula Marathon

BibRave, December 2020

Missoula is also proud to be the host city for University of Montana athletics, where Montana Grizzly pride runs deep. Grizzly athletics brings people from across the region to enjoy Missoula’s unwavering tradition of college sports. In January of 2020, Stadium Journey Magazine ranked all the Football Championship Subdivision stadiums across the country, and Washington Grizzly Stadium came in as #2.

The Fort Missoula Regional Park features a five-field, lighted softball complex with moveable fences, two additional softball fields, nine full-size multi-use fields for soccer, football, lacrosse and rugby, one lighted artificial turf multi-use field, pickleball, basketball and volleyball courts. The addition of these amenities allows Missoula to bid for and host major tournaments that Destination Missoula previously had not been able to for lack of infrastructure. These tournaments have a positive economic impact on Missoula. This park is the realization of a years-long effort to create a recreation epicenter in Missoula, including walking trails, open space, playgrounds, picnic shelters and pavilions, historic interpretation and more.





### MUSIC AND ENTERTAINMENT

Part of our charm is that we march to the beat of our own drum here in Missoula, and we wholeheartedly celebrate the mountain sound and the rhythm the rivers afford. Missoula’s music scene is broad, running the gamut from orchestral to bluegrass and country to hip hop, and the city has hosted such icons as Pearl Jam, Paul McCartney, The Rolling Stones, Mumford and Sons, Chris Stapleton, Sheryl Crow and many more. Missoula’s outdoor venues steal the scene during the summer. Ogren Park at Allegiance Field has been a go-to for summer entertainment for crowds up to 10,000 people, and we’re waiting to see if they will continue this trend in summer 2022 and 2023. Big Sky Brewing features an amphitheater next to the brewery with a capacity of 5,000. The 4,000 seat KettleHouse Amphitheater in Bonner (7 miles from Missoula) sits along the banks of the beautiful Blackfoot River. With a vast and seemingly endless array of arts and entertainment events and an abundance of restaurants, cafés, coffee houses, breweries, wine bars and distilleries, having fun off the trail is just as easy to do. The varied music venues in Missoula are receiving national acclaim with The Top Hat and The Wilma listed in Pollstar’s Top 100 Clubs and the Kettlehouse Amphitheater listed in the Top 100 Amphitheaters in the US!

### NIGHTLIFE

For a small town, Missoula surprises with a nightlife scene that is the perfect combination of laid back and trendy. Whether visitors are looking for upscale dining and cocktails or dive atmospheres, they will find affordable fare, great ambiance and many options throughout the entire town. First Friday Gallery Night is consistently a favorite for visitors where they can mingle with locals, have complimentary beverages and snacks and take in local artwork. The additional storefronts in the Mercantile Building have provided increased options for dining and nightlife and extended the already-vibrant downtown scene in Missoula.

### TBID PARTNERSHIP

The Missoula Tourism Business Improvement District (TBID) and Destination Missoula boards work in close partnership. The boards meet together monthly, set mutual goals, and establish budgets that work in concert to effectively market Missoula. TBID and DM private funding help to enhance bed tax funded programs and solely fund additional programs outlined in the Marketing Plan narrative to create a complete and well-rounded plan that supports their mission. This partnership has proven a great strength not only for both organizations but for Missoula’s overall tourism industry.

*The Top Hat and The Wilma listed in Pollstar’s Top 100 Clubs and the Kettlehouse Amphitheater listed in the Top 100 Amphitheaters in the US!*

# OUR OPPORTUNITIES

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## TRANSPORTATION

Mountain Line's Zero-Fare bus service improves the quality of life for Missoula's entire community because more transit riders means better air quality, less traffic and parking congestion, more students getting to class, more employees getting to work, and more seniors and people with disabilities staying active and mobile.

UBER and LYFT are also available transportation sources for the Missoula community. These app-based services put a ride or a delivery at your fingertips. It also provides a flexible source of income for Missoulians. Mountain Line and ride sharing services offer a huge benefit to visitors who wish to explore the city but have opted not to rent a car, as there is service from the Missoula Montana Airport to all reaches of town.

The Missoula Montana Airport has seen a steady increase in yearly passengers, and our numbers have already returned to normal after the decrease in air travel due to the pandemic. We are increasingly optimistic about the influx of new flights as the airport expansion is underway, with Phase 1 already completed and more to come. Our visitor experience will only improve as the airport expands to accommodate more travelers and routes.



## ECONOMIC UPTURN

Despite the many challenges our economy faced in the past few years, Missoula has continued to bounce back and see new growth in sectors that directly relate to tourism. Many new retail stores, restaurants and breweries have opened or are slated to open in Missoula in all three shopping districts, and we expect to see new hotels opening, existing hotels renovating, increased private student housing in the city core, a growing tech industry, and the complete reconstruction of our airport to accommodate our increasing demand for air service. Southgate Mall's expansion, including the opening of SCHEELS, has created even more opportunities for economic growth.



## INFRASTRUCTURE

The face of Missoula is changing rapidly, all the while preserving the heart of what makes this community one truly extraordinary place. These are a few of the major projects that have recently been completed or will be completed within the next few years:

**MID-TOWN GROWTH** – Southgate Mall completed a 70,000-square-foot expansion project bringing new dining, shopping, entertainment, retail and office space to the midtown district of Missoula. With more than \$64 million in private investments and additional funding from the City of Missoula, this project created a new street network in the surrounding neighborhoods to create ease of access to surrounding schools and entertainment options, and to enhance livability and raise property values. This multi-year project actively creates new property tax revenue in addition to adding upwards of 700 new construction jobs, 375 new permanent jobs, and safeguarding 1,250 existing jobs. While 2019 saw the closure of Lucky’s Market and JCPenney, Southgate Mall’s renovations have begun to attract more big brand names such as SCHEELS (opened in 2021) and Hobby Lobby (set to take over the former Lucky’s Market and adjacent building), and we anticipate many more restaurants and retail stores will take over the newly renovated storefronts at Southgate Mall. The Mustard Seed building now allows the restaurant to have greater capacity and outdoor seating and a rooftop deck.

In recent years, Midtown Missoula has seen new businesses including OddPitch Brewery and WinCo, as well as local favorites expanding from downtown to Midtown, including Dram Shop, Notorious P.I.G., Big Dipper, Bridge Pizza, The Trail Head, and El Cazador. The opening of second storefronts from these Missoula treasures has only served, and will continue to serve, to enhance the charm of the Midtown area and bring local Missoula flavors to an area of town that was once known primarily for larger branded stores.

Additionally, the Missoula Fairgrounds, home to the Western Montana Fair and other large special events, is expanding their footprint, including the expansion of the ice rink, building a Butterfly House and Community Gardens, and improved work on the site’s buildings with the goal of increased accessibility. Over at the University of Montana campus, the Montana Museum of Art and Culture has broken ground on a new building that will host the largest public art collection in the state.



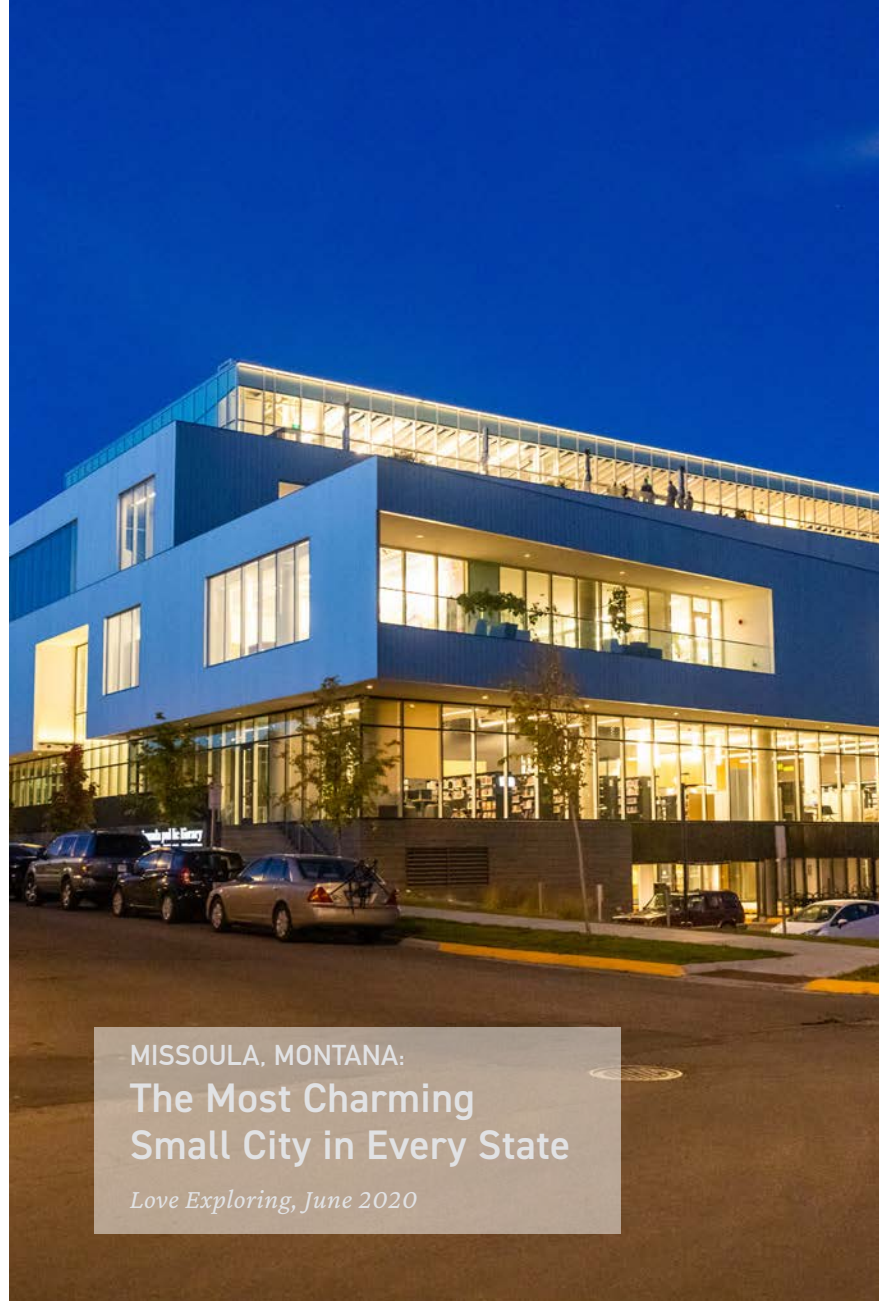
**DOWNTOWN MISSOULA REVITALIZATION** - Downtown Missoula has recently seen an influx of new businesses which are adding a fresh new face to the town. We've seen the recent additions of Brasserie Porte Rouge, Ducrey Chocolate, Pink Elephant, Crafted, Clover, A. Banks Gallery, Rhapsody Montana, T & Crepes and the newly renovated Old Post. Harlow, a new retail shop on the Hip Strip, will also open in May 2022. New downtown hotels include The Wren and The AC Hotel, with the AC also working on a rooftop cocktail bar scheduled to open in 2022. The ground floor of The Wren will also house Black Coffee Roasting Company and Revolvr Menswear. Across the river, new housing, restaurants and retail developments are slated for the previous site of the Missoulian. On top of new business development, the Higgins Bridge has been replaced and renamed the Beartracks Bridge, with expanded walking paths (to be completed in Summer 2022). Caras Park is undergoing a remodel of its own, which will expand river access, increase multi-use lawn space for events and activities, and replace the concrete amphitheater with seating more easily accessed by people of all abilities.

**HOTELS** – On top of the recent downtown additions of The Wren (opening soon) and AC Hotel (opened in 2021), the Homewood Suites by Hilton will replace Ruby's Inn, WoodSpring Suites opened on North Reserve, and a number of current hotels are renovating their space to better accommodate visitors. These include the Wingate by Wyndham (soon to be Fairfield by Marriott), Holiday Inn Missoula Downtown, Hilton Garden Inn, Days Inn & Suites by Wyndham Downtown Missoula University, and Comfort Inn 1-90 Shopping District.

**MISSOULA PUBLIC LIBRARY** – The Missoula Public Library is the busiest library in the state, with 700,000 visitors annually, 60,000 cardholders and more than 1 million items loaned out per year. The newly built library serves as a lifelong learning hub for Missoula County, a permanent anchor of downtown Missoula, and a popular cultural destination for Western Montana's many visitors

**SAWMILL DISTRICT** – Located on the southside of the Clark Fork just outside of downtown, the Sawmill District is a new-construction consisting of condos, restaurants, retail and office space. This includes the recent addition of the Boxcar Bistro and Cambie Taphouse + Coffee's second location. This trendy new neighborhood abuts the Riverfront Trail System, providing easy access to the rest of town, and is in close proximity to Ogren Park, the Missoula PaddleHead's Stadium at Allegiance Field, Silver Park, Currents Aquatic Center, MoBash SkatePark and numerous other recreational opportunities. Additionally, construction is underway for a new tech campus said to open up space for hundreds of new workers in the Sawmill District.

**MISSOULA MONTANA AIRPORT** – The Missoula Montana Airport's \$110,000,000 expansion project is underway. The project will be completed in two phases and is expected to be completely finished in 2023. Phase 1 of the new airport terminal has been completed, and the second phase is scheduled to be finished in 2023. The plans also include room for future expansion of the airport.



MISSOULA, MONTANA:  
The Most Charming  
Small City in Every State

*Love Exploring, June 2020*



## CULINARY AND SPIRITS TOURISM

Two of the hottest trends in travel right now are culinary trips and spirits trips, and Missoula is the perfect place for both. The global culinary tourism market was valued at \$1,116.7 billion in 2019 and is expected to have a market value of \$1,796.5 billion by 2027, registering a CAGR of 16.8% from 2020 to 2027.

*“Food has an unmatched ability to communicate a unique sense of place. Local cuisine provides a direct connection to the history of a region, the soul of its people, and the rhythm of daily life.”*  
- Skift.com.

Missoula’s food scene has always been strong, but with the introduction of new retail and restaurant space downtown and Midtown, Missoula is witnessing a cultural food movement. Missoula’s continued growth in this sector sets us up solidly as a food travel destination. From Missoula’s locally sourced restaurants to our food trucks, breweries, distilleries, cider house and winery, Missoula has the unique experiences these travelers expect. Missoula is working hard to revive our food and beverage scene after the challenges faced over the past few years. We created the Missoula Dining Guide in 2021, and we’re actively looking for opportunities to help boost this sector even more through our marketing efforts in 2022/2023.



MISSOULA, MONTANA:

**BEST CITIES FOR BEER DRINKERS - 2020 EDITION**

*Yahoo Finance, December 2020*



## RETAIN VISITORS

Approximately 3.6 million people pass through Missoula annually, but approximately half spend one or more nights in the community. This presents a great opportunity for the Missoula community to reach more visitors who are already passing through.

## DESTINATION STEWARDSHIP PLAN

While the pandemic put this project on hold for a year, Destination Missoula and the Missoula Tourism Business Improvement District will spearhead a Destination Stewardship planning process for Missoula and the surrounding area. Destination Missoula's goal is to create a community wide discussion based on extensive research regarding tourism's role in Missoula. The plan will assess infrastructure and management needs into the future so that the Missoula community has a roadmap to balance our resources and our quality of life with the economic resources provided by a healthy tourism economy. The plan will encompass partners across our community from city and county government, outdoor recreation interests, the University of Montana, the business community, economic development to bring awareness of the tourism industry and to help guide the final plan. Extensive research will be done with Missoula's visitors and also Missoula's residents to explore the role tourism plays in helping to sustain and advance Missoula's community values and quality of life.



# CHALLENGES

## ECONOMIC UNCERTAINTY

Like every tourism market, we are waiting to see how rising inflation and gas prices will impact Missoula. Supply chain issues, workforce shortages and access to affordable housing also remain high on our list of issues to monitor closely. Already, Missoula is seeing businesses shorten hours and availability due to workforce shortages, and the workforce shortages go hand-in-hand with access to affordable housing.

Our drive markets in particular could be deterred by the current gas prices, as well as the uncertainty of future gas price increases. However, visitors can access outdoor activities and city amenities within a short distance once they arrive in Missoula. Our bike trails, walking trails and public transportation also offer free alternatives to driving.

## AIR ACCESS

Missoula air service expansion is limited by the terminal facilities. However, with completion of Phase 1 of the new airport, capacity for new flights and airlines has been expanded and will continue to grow with Phase 2. Destination Missoula will continue to concentrate on expanding seasonal to year-round flights for the routes that make sense.



## MISSOULA, MONTANA: 2021's Happiest Cities in America

*WalletHub, March 2021*

## CANNABIS INDUSTRY

Destination Missoula will work to educate residents and visitors on how to safely and legally buy and consume cannabis while here. We have seen a decrease in available downtown retail space due to the increase in dispensaries, but we are waiting to see if, and how, the legalization of cannabis impacts our tourism industry outside of this factor.

## RENTAL CARS

Montana saw an influx of visitors in 2021 as our tourism industry rebounded from 2020, but rental car agencies struggled to keep up in many areas, including Missoula. While Missoula offers free public transit and a large system of biking and walking trails, the lack of available rental cars can still deter visitors. The existence of ride-sharing services like Uber and Lyft, in addition to car-sharing services from apps like Turo, can help offset this challenge while offering new income streams for Missoula residents.

## SEASONALITY

Although Missoula has a more balanced annual visitation than most Montana cities, the vast majority is within the months of April through October, leaving over \$20 million in vacant room nights during the months of November through March. Since Missoula is not a major winter destination, Destination Missoula will continue to center marketing efforts to bolster Missoula's shoulder seasons through group and tour travel, sporting and cultural events, and meetings and conventions.

## CLIMATE CONCERNS

Climate change has created unpredictable conditions for tourism, especially in the late spring and early summer seasons. It is hard to say if the river will flood and be too high for floating and fishing in June, or if the coloration will mimic the gorgeous summertime photos that are spread to inspire people to visit. The dry summers have created fire conditions that have impacted travel to Missoula. The unpredictability caused by climate change is proving a challenge when advising visitors on travel timetables and plans. Winter sports are also impacted by climate change, as it is hard to determine if snowshoeing, cross country skiing, snowmobiling and downhill skiing are activities that can be conducted as early or late as once was the norm.

## SHORT TERM VACATION RENTALS

Airbnbs and other short term rentals through private individuals have historically been a strain on organizations like Destination Missoula who rely on TBID and bed tax funding. However, even though Airbnbs are now required to pay the same taxes as hotels, they still create a strain to the community at large and to the traditional hotel industry that so much of Missoula tourism was built around. While having Airbnb rental options is a benefit to attract younger travelers, Missoula has seen an increase in housing prices, including investments in second homes or rental-only homes, which has made it challenging for locals to obtain affordable housing. Airbnbs can offer lower prices than hotels or group accommodations that hotels cannot compete with, and this reality is putting a strain on hotels and their employees.

## LOW CONVERSION OF TRAVELERS PASSING THROUGH

As mentioned in the “Opportunities” section, Missoula does not convert approximately 1.5 million transient travelers a year, who either drive through or stop shortly for gas and to eat but do not spend the night. It is difficult to pull them off the interstate. Destination Missoula will continue marketing campaigns to entice travelers to stay longer.

## INTERNATIONAL TRAVEL

Although Destination Missoula, through our sales department, will continue to focus efforts on increasing and broadening our group and tour travel, it will definitely be another year of uncertainty in this sector as COVID-19 restrictions continue to change. There’s still uncertainty surrounding international travel, but we’re monitoring things closely and keeping an eye out for marketing opportunities as borders reopen to nonessential travel. When we feel international travel is safely picking up again, we plan on working in cooperation with BrandMT and Glacier Country Tourism to attend trade shows directly targeting these markets and looking to increase awareness of Missoula in international markets, specifically Canada, China and Western Europe.

## LACK OF TOURISM INFRASTRUCTURE

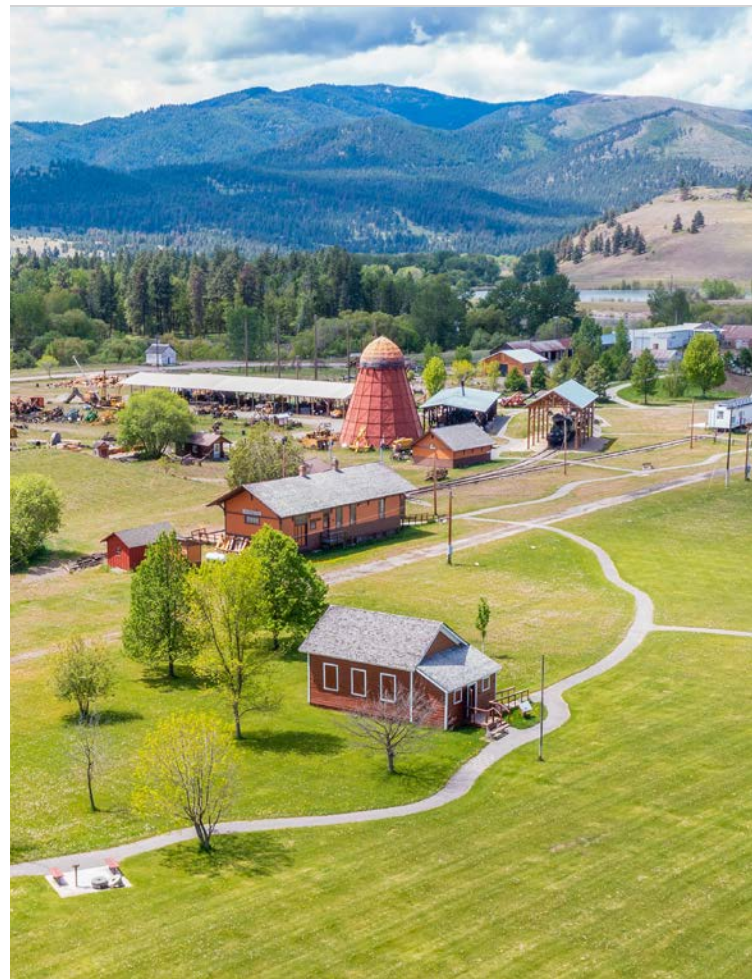
Although Missoula has many wonderful venues, in order to take the next step in growth, there is a need for infrastructure currently missing in the community. The largest indoor arena is owned by the University of Montana, and although they are willing and accommodating partners, the University’s schedule for the arena is paramount. Also, Missoula does not have any one facility with enough size to accommodate city-wide conferences or conventions without the group utilizing multiple properties. In order to accommodate events of this size, Destination Missoula has to bid them out to a number of venues, which is not ideal to meeting and event planners.

## PARKING

With all of the new projects in downtown Missoula—especially new hotels and restaurants—and new employment opportunities, parking in downtown Missoula continues to be an issue until new parking facilities are built. Limited parking reduces access to the wonderful amenities that can be found in downtown Missoula. Luckily, Mountain Line does offer Park and Ride options for large events, providing much-needed access when parking is at its most limited.

## ORGANIZATIONAL FUNDING

With constantly trying to find new and innovative ways to raise private funding, and the lingering uncertainty of bed tax funding, stable funding for Destination Missoula is always an issue and a priority. Destination Missoula, in partnership with other tourism industry organizations, works on a continual basis to educate Missoula and Montana legislators and citizens on the importance of tourism to a healthy state economy and to work towards preserving and enhancing bed tax funding. Destination Missoula also works in partnership with the Missoula Tourism Business Improvement District to expand and to create new private revenue sources for Destination Missoula.





## » CHALLENGES



### DEVELOPING NEED FOR VISITOR EDUCATION

Over the past few years we've seen a growing need for visitor and resident education surrounding responsible recreation and sustainable tourism. Destination Missoula took on the role of outreach and education through multiple marketing campaigns and community-wide partnerships.

### LACK OF COMMUNITY-WIDE STRATEGIC ORGANIZATION

Although Missoula is seeing progress in this realm, due to a lack of communication and a comprehensive event strategic plan, Missoula does not have cohesion and lacks strategic community organization of citywide events. It is difficult to maximize economic opportunities and enhance visitor experiences around events with the lack of cohesion. Resident sentiment can also be negative due to a misperception of tourism causing overcrowding and housing shortages, and it will require a group effort to educate locals about the benefits of tourism.

Destination Missoula and the Missoula Tourism Business Improvement District will initiate a Destination Stewardship Plan this year. It is the intention of the organizations to initiate research on both Missoula's residents and visitors to help us better understand the optimal balance between Missoula's community and tourism. From that research and understanding and with community-wide input, Destination Missoula will create a vision and direction for tourism growth and infrastructure into the future, and how Destination Missoula can guide that plan to fruition.

## 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.





# 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.



# OUR AUDIENCE

## 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.

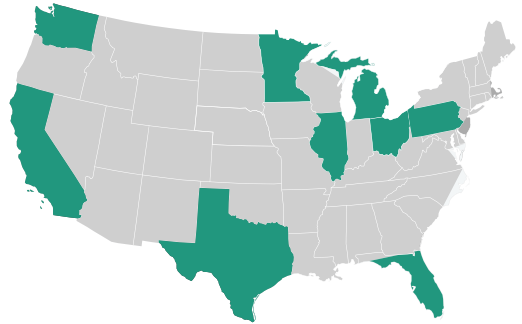
To ensure the most effective use of marketing funds and energies, markets will be pursued in the following order:

- 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.

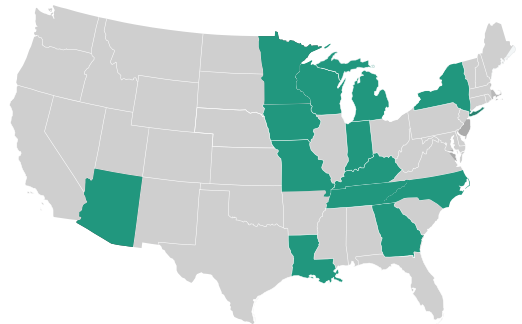
## DEMOGRAPHIC

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.

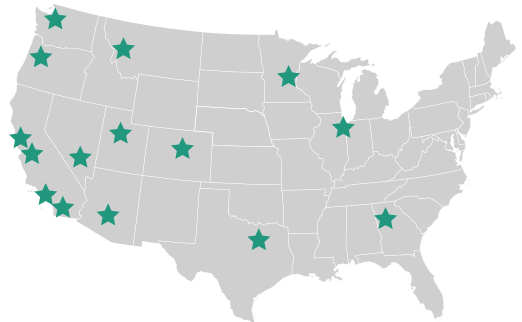
PRIMARY STATES WITH MOST INQUIRES



SECONDARY STATES WITH MOST INQUIRES



NON-STOP FLIGHT MARKETS





## 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



# 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](http://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 “tournications.” 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

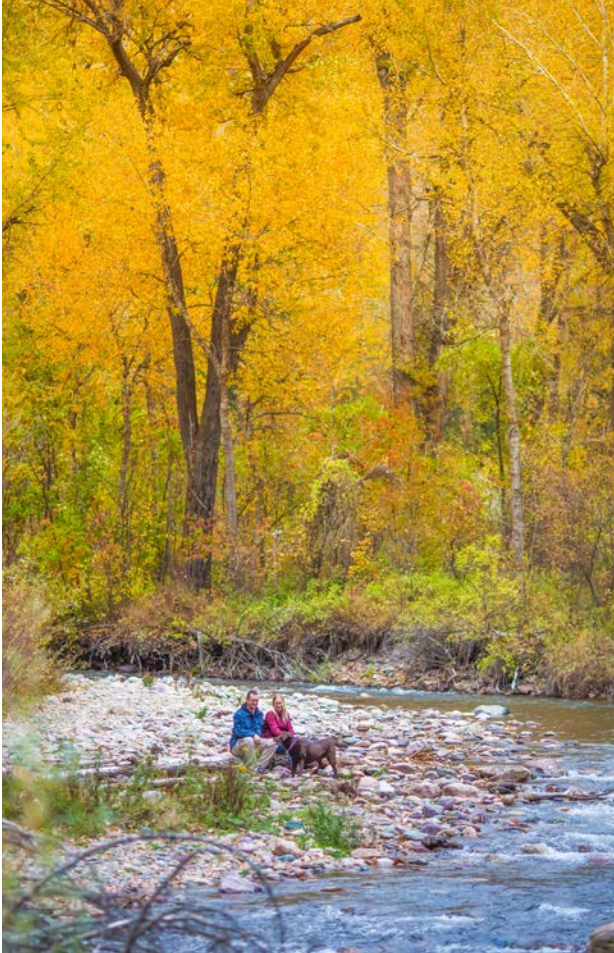
These travelers tend to be highly educated, mature, affluent, well-traveled, environmentally aware and sensitive to the social and cultural traditions, systems and mores of the destination they visit. They are similar to, and in many cases crossover with, the culinary traveler. Missoula is proud of the 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.

## MISSOULA, MONTANA:

# HEALTHIEST CITIES IN AMERICA

*USA Today, October 2020*



## 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. bird-watchers 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 American Studies building on the University of Montana campus and the Three Chiefs Culture Center and Museum north of town.



# SUPPORTING RESEARCH

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://destinationanalysts.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](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](http://www.thewanderingrv.com/female-travel-statistics))
- Sports Events and Tourism Association - State of the Industry Report 2019 ([www.sportseta.org/research/state-of-the-industry-report](http://www.sportseta.org/research/state-of-the-industry-report))
- National Association of Sports Commissions – 2017 Sports Tourism: A State of the Industry Report ([www.sportscommissions.org](http://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](http://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/the-new-era-of-food-tourism-trends-and-best-practices-for-stakeholders/](http://research.skift.com/reports/the-new-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-insightsfood-and-wine-travelers>)
- Skift – Megatrends Defining Travel in 2022 ([skift.com/megatrends-2022](http://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-activity-type-age-group-and-mode-of-booking-301106550.html](http://www.prnewswire.com/news-releases/global-culinary-tourism-market-2020-to-2027---by-activity-type-age-group-and-mode-of-booking-301106550.html))
- Kaplan University – Mapping the Study of Motorcycle Tourism ([www.kaplanuniversity.edu](http://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/north-america-travel/music-tourism-has-potential-but-industry-must-pick-up-the-tempo>



## DESTINATION MISSOULA FY23 GOALS

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 into 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.



# ACHIEVING & MEASURING OUR GOALS

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## 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.**

Metric(s):

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



## 2022 – 2023 BUDGET

BrandMT Projection @ 90%	\$452,945
Uncommitted Funds @ Audit (under budget line items)	-0-
Rollover@ MOTBD (unanticipated revenue)	-0-
<b>TOTAL PROJECTED BUDGET FY 2022-23</b>	<b>\$452,945</b>

Please identify projects and amounts you would eliminate or reduce if revenue decreases by 10%. DM has already reduced BrandMT's projected budget from 95% to 90%.



The following budget is reflective of bed tax solely. These projects and others outlined in the narrative of the Destination Missoula 2022-23 DMO Plan are also supported through other funding sources.

# FY 2022-23 DESTINATION MISSOULA BED TAX BUDGET

	BED TAX
<b>NEW REVENUE</b>	
Collections FY 2022-23 - Projected	\$452,945
<i>New Revenue Total</i>	<b>\$452,945</b>
<b>EXPENSES</b>	
Administration	\$90,589
Agency Services	\$18,000
Earned Media	\$100
Education/Outreach	\$9,900
Marketing Resources	\$31,750
Opportunity	\$29,700
Paid Media	\$106,431
Product Development	\$10,000
Research	\$2,500
Visitor Services	\$112,975
Website Development	\$41,000
<b>TOTAL EXPENSE</b>	
	\$452,945
<b>TOTAL INCOME</b>	
	\$452,945



DESTINATION  
*Missoula*  
MONTANA

