



DESTINATION
Missoula
MONTANA

**Destination Missoula
FY 23-24 DMO Plan**

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INDIGENOUS LAND ACKNOWLEDGMENT

Destination Missoula and the Missoula Tourism Business Improvement District acknowledge that we are in the aboriginal territories of the Salish, Kootenai, and Kalispel people. Today, we honor the path they have always shown us in caring for this place for the generations to come.



PREFACE

As we enter a new year of destination marketing, we are optimistic about tourism in Montana and in Missoula. Life is returning to “normal” with the availability of vaccines, allowing individuals to take time planning extended vacations rooted in meaningful experiences. In addition to the return of meetings and conferences held at local facilities, there’s notable eagerness within the general public to get out and explore new destinations. According to the latest Destination Analyst report, the tourism industry is seeing a significant uptick in traveler excitement compared to the last three years. 84% of Americans expressed excitement for upcoming leisure trips in the next 12 months, with half of American travelers reporting at least two weeks of vacation days on the horizon. This enthusiasm and pent up energy around travel points to another busy year in Montana tourism.

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 2023/24 as a period 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, Destination Missoula has undergone an extensive RFP process in hopes of bringing a Destination Stewardship Plan to Missoula and the five surrounding valleys. We are thrilled to announce the subsequent award of this project to MMGYNextFactor, and aim to create a new joint vision for our organizations, based on sustainability-focused values and tenants. Through this lens, we will create a 10-year, community driven Destination Stewardship plan for the future of tourism in our area—the light at the end of the tunnel! This 10-year roadmap will provide an organized and structured framework for inclusive, informed, value-based methods to drive sustainable tourism development and promotion. The ultimate goal is to preserve the quality of life for our residents, to limit impact on our environment, and to inform and inspire visitors to travel with care while they enjoy the many recreational options in our beautiful home.





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.



**This Beautiful,
Rugged Mountain
State Deserves a Spot
on Your Bucket List**

- Thrillist January 2022



OUR STRENGTHS

*The Top 40 Arts-Vibrant
Communities of 2022*
- SMU DATAARTS

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 individuals who add a dimension and depth to the community that is usually only associated with 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.

The past few years have brought unprecedented hardships 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. Now, we see exciting new growth emerging in this sector. 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. The support the Missoula community has shown for our arts 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 five major air carriers and has non-stop flights to the following destinations:



MISSOULA MONTANA AIRPORT IS THE FOURTH AIRPORT IN THE NATION AND THE ONLY AIRPORT IN THE STATE TO BE CERTIFIED AS A “SENSORY INCLUSIVE FACILITY” THROUGH KULTURECITY.

NON-STOP FLIGHTS TO MISSOULA

UNITED:

- DENVER
- SAN FRANCISCO*
- CHICAGO*

DELTA:

- SALT LAKE CITY
- MINNEAPOLIS/ST. PAUL
- ATLANTA**

AMERICAN:

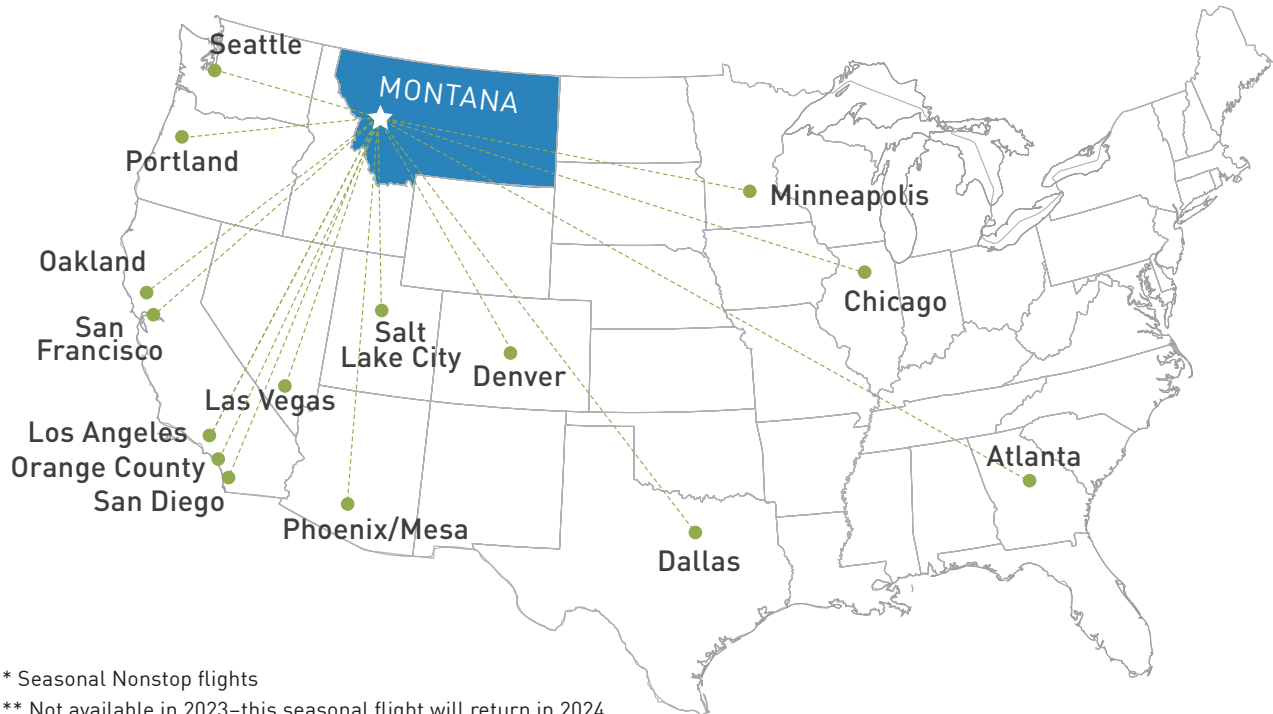
- DALLAS
- LOS ANGELES*
- CHICAGO*

ALLEGiant:

- LAS VEGAS
- PHOENIX/MESA
- OAKLAND*
- LOS ANGELES*
- ORANGE COUNTY*

ALASKA:

- SEATTLE
- PORTLAND*
- SAN DIEGO*
- SAN FRANCISCO*



* Seasonal Nonstop flights

** Not available in 2023–this seasonal flight will return in 2024



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 home to a wide range of sports teams to cheer on. We've got everything from Griz Hockey and our Hellgate Roller Derby league to Missoula's very own Curling Club and Freestyle Ski Team. Not to mention our beloved Minor League Baseball team, the Missoula PaddleHeads, whose home turf is nestled along the Clark Fork River at the scenic Ogren Park at Allegiance Field. In addition to the numerous UM Griz sporting events open to the public, we also host several races, including 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. Missoula's sports and recreation sector continues to grow

as we gear up to host two new, high-level events this year. In June, Missoula will host a premiere Disc Golf tournament as part of the larger 2023 Disc Golf Pro Tour—a professional disc golf circuit for the best players in the world. Missoula was also selected to host the Pan-Am Cyclocross Championship for 2023 and 2024. This is an incredible opportunity for our small mountain town, as this world renowned race brings in competitors and spectators from 44 different countries around the globe.

Missoula is 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. Our Washington-Grizzly Stadium welcomes locals and visitors alike to rattle the stadium with shouts of support for their teams. It also receives numerous accolades, solidifying its national reputation as an outstanding venue. In 2022, the NCAA ranked Washington Grizzly Stadium as the 12th biggest FCS football stadium in the country. Washington Grizzly Stadium also earned the coveted top spot of #1 FCS Stadium Experience in the nation, according to Stadium Journey.

"There's not a bad seat in the house, even from the new upper deck on the east side called the Majestic Plaza. Though having one of the largest seating capacities in FCS football, the inside of the stadium feels compact and intimate." - Stadium Journey

The Fort Missoula Regional Park spans 156-acres and features a five-field, lighted softball complex with moveable fences, two additional softball fields, 10 full-size multi-use fields for soccer, football, lacrosse and rugby, one lighted artificial turf multi-use field, pickleball, basketball and volleyball courts, public restrooms and parking lots. The park was the first SITES-certified project (constructed with sustainable, long term community usage and planning in mind) in Montana and the largest SITES certified developed park to date. These impressive amenities allow 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—accessible to all ages and abilities—providing walking trails, lots of 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. 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. It has received national acclaim, year after year, and recently ranked 8th among top amphitheaters worldwide by Pollstar. But the expectation for music tourism doesn’t stop at a single venue--Pollstar listed Missoula as a whole among the Top 100 Concert Markets in the U.S. for 2023!

NIGHTLIFE

For a small town, Missoula surprises with a nightlife scene that is the perfect combination of laid back, family-friendly, weird 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 admire local artwork while perusing downtown. The additional storefronts in the Mercantile Building have provided increased options for dining and nightlife and extended the already-vibrant downtown scene in Missoula. We have regular happenings that amp up the nightlife experience as well; local comedy shows, bar karaoke, DJs and bands, drag shows, and even dueling pianos at our very own speakeasy lounge. We also offer family-friendly “nightlife” options, like the bowling alley, arcade, pool table, and bar found at Westside Lanes. Most of our local breweries are family-friendly too, so you can sip a tasty craft beer and play trivia with the whole family downtown scene in Missoula.



Best Run Cities in America - 2022 WalletHub

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 DMO 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.



OUR OPPORTUNITIES

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.

In addition to a number of car rental agencies in town, as well as private car rental options using TURO, visitors can find their way around the Missoula community using UBER and LYFT. 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, a growing tech industry, and the complete reconstruction of our airport to accommodate our increasing demand for air service. Southgate Mall's expansion 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 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. We anticipate many more restaurants and retail stores will take over the newly renovated storefronts at Southgate Mall. Texas Roadhouse and Hobby Lobby are expected to open in the next year.

In the same spirit of stewardship, the Midtown Master Plan was created to provide a voice for the people who live, work and recreate in Midtown, and collaboratively establish ways to promote equitable development and belonging in their community. Midtown has seen many changes in 2022, and in the coming year, the Missoula Midtown Association will team up with ECONorthwest and local residents to create a project process and timeline that will reflect the values of destination stewardship, in preparation for future growth in the area.

Midtown Missoula has quickly become a prominent destination in town, as a steady emergence of new businesses set up shop in the area. Some new developments include Market on Front's upcoming Midtown store, The Den, Florabella, Double K Ranch Deli, and El Cazador, as well as a new location for Liquid Planet. Kent's Plaza recently opened to the public as well, filling its storefronts with several leisure-focused businesses like OddPitch Brewery, Rice Fine Thai Cuisine, Lookout Throwing Co, The Nail Place, Golden Leaf Studios, and more. Green Source Missoula opened a second location in VRTX Gym, providing a space for members to work, study, and relax—pre or post workout. The opening of second storefronts from some of Missoula's finest businesses 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 (opening summer 2023) and Community Gardens, and improved work on the site's buildings with the goal of increased accessibility.



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, Tea & Crepes, Bar Plata, Relic, and Montana Design. New downtown hotel additions include the much-anticipated opening of The AC Hotel's rooftop cocktail bar, and just across the street, The Wren opened its boutique hotel doors. The ground level of The Wren also houses Black Coffee Roasting Company and Revolv'r 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, Beartracks Bridge (formerly Higgins Ave Bridge) now includes expanded pedestrian lanes stretching across it, making it easy for bikers, walkers, and people using motorized wheelchairs or strollers to access either points of downtown. Beneath the bridge in Caras Park, Phase 1 of the area's remodel has been completed, resulting in increased multi-use lawn space for events and activities. The park's concrete amphitheater was leveled, allowing for additional seating more easily accessed by people of all abilities. Phase 2 of the Caras Park remodel will include creating accessible river areas, a plaza for the Clark Fork Market, additional trails, new restrooms, and eventually, an ice ribbon for winter skating.



Missoula Public Library Name World's Best in 2022

*International Federation
of Library Associations*

HOTELS

On top of the recent downtown additions of The Wren (opened late Winter 2022) and AC Hotel (opened in 2021), the Homewood Suites by Hilton will replace Ruby's Inn, and a number of current hotels are renovating their space to better accommodate visitors. These include the 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 Cambie Taphouse + Coffee's second location, and soon-to-be second location of Tagliare's newest sandwich shop. 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 PaddleHeads Stadium at Allegiance Field, Silver Park, Currents Aquatic Center, MoBash SkatePark and numerous other recreational opportunities. Additionally, the district's first Tech Campus was completed in 2022, just the first phase in a list of projects aimed to open up space for hundreds of new workers in the Sawmill District. The district also announced that construction is underway for eight Sawmill Townhomes.

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 2024. Phase 1 of the new airport terminal has been completed, and the second phase is scheduled to be finished in 2024. The plans also include room for future expansion of the airport.

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 \$805.9 billion in 2022 and is expected to have a market value of \$2,114.2 billion by 2028, registering a CAGR of 17.44% from 2022 to 2028. 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 assorted food and dining experiences these travelers expect. With all of these options available to guests, not to mention the success of “Taste of Missoula”—the town’s premiere food and beverage walking tours—it’s easy to see why Wallethub listed Missoula among the Best Foodie Cities in the US in 2022. After receiving immensely positive feedback from our first Missoula Dining Guide in 2021, we will produce a second guide with up-to-date information about our now thriving (and ever growing) drink and dining scene.

MISSOULA, MONTANA: BEST CITIES FOR DRINKERS

-2022 SmartAssesst





RETAIN TRANSIENT 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

Destination Missoula and the Missoula Tourism Business Improvement District have created a blueprint for the Destination Stewardship planning process to be implemented in Missoula and the five surrounding areas. 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 and neighboring areas will have a roadmap to balance resources and 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 and residents to bring awareness of the tourism industry and to help guide the final plan. Extensive research will be done with Missoula's visitors and residents to explore the role tourism plays in helping to sustain and advance Missoula's community values and quality of life. Collecting this input, along with up-to-date data on sustainable tourism practices, Destination Missoula and the surrounding areas will collaboratively create a 10-year roadmap for sustainable tourism development and promotion. With several projects already live or in-progress, Destination Missoula is continually addressing—and moving full force—towards sustainable tourism practices, as well as inclusive and accessible options for our residents and visitors.

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 fluctuation of 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

With completion of Phase 1 of the new airport, capacity for services, seasonal flights, and new airlines has been expanded and will continue to grow with Phase 2. That said, the expansion of new airlines is directly tied to an air service revenue guarantee program. Without this funding, it will be much more difficult to entice potential airlines to bring new services to Missoula, which will limit our potential market growth tremendously. Destination Missoula will continue to concentrate on expanding seasonal to year-round flights for the routes that make sense.

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. Presently, though numbers have not bounced back to pre-pandemic levels, car rental services in Missoula are slowly but surely building up their vehicle inventory options. 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 \$27 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 our 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 TRANSIENT TRAVEL

As mentioned in the “Opportunities” section, Missoula does not convert approximately 1.5 million pass-through 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

Destination Missoula, through our sales department, will continue to focus efforts on increasing and broadening our group and tour travel. Although there may be lingering uncertainty surrounding international travel in some global sectors, we’re monitoring worldwide data and tourism trends for opportunities to devise creative and effective marketing strategies to promote travel to Missoula. We are working in cooperation with BrandMT and Glacier Country Tourism to attend trade shows directly targeting these markets and plan to increase awareness of Missoula in international regions, specifically Canada, China and Western Europe.

LIMITED COMPREHENSIVE CONVENTION SPACE

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.

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, city, county, economic development, land managers 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 year-round flight markets include Seattle, Salt Lake City, Las Vegas, Minneapolis, Denver, Dallas, 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:

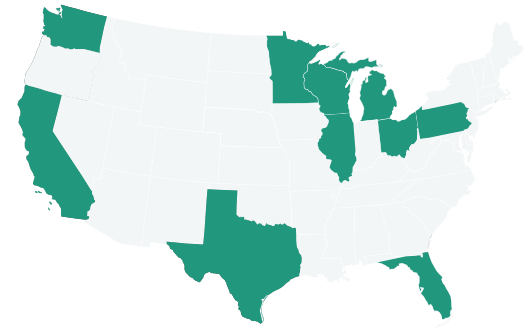
- Non-stop flight markets.
- Regional drive markets.
- The primary states from which most inquiries come: Texas, Florida, California, Illinois, Ohio, Michigan, Wisconsin, Pennsylvania, Washington Minnesota.
- The secondary states from which most inquiries come: Missouri, Indiana, North Carolina, New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

DEMOGRAPHIC

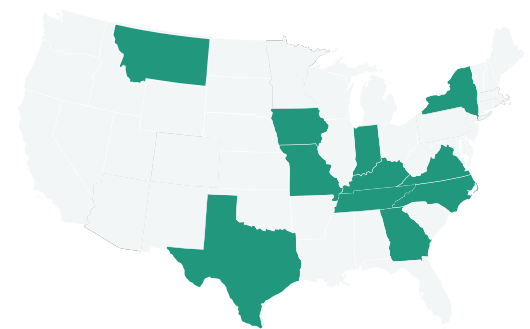
In addition to the geographic target markets, there are demographic markets Destination Missoula will target with tourism promotion and marketing. Each of these markets represents a strong and growing segment of the tourism marketplace. Destination Missoula will pay particular attention through this 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 54 years of age with an income of \$75,000 – \$200,000+, and 81% of visitors were either traveling alone or as a couple. The demographic markets are described on this page.

- PRIMARY STATES WITH MOST INQUIRES
- SECONDARY STATES WITH MOST INQUIRES
- NON-STOP FLIGHT MARKETS
- TARGET MARKETS

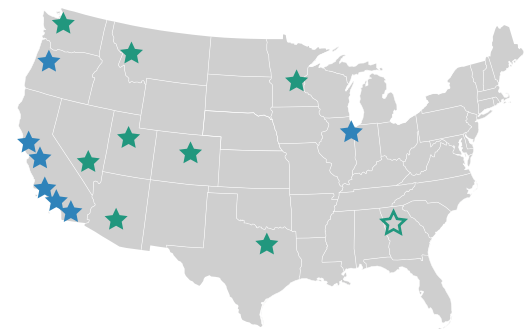
PRIMARY STATES WITH MOST INQUIRES



SECONDARY STATES WITH MOST INQUIRES



NON-STOP FLIGHT MARKETS



- ★ Nonstop flights
- ★ Seasonal Nonstop flights
- ☆ Not available in 2023–this seasonal flight will return in 2024

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
- Birder and wildlife enthusiasts
- Sustainability travelers
- Wellness travelers
- Last-minute travelers
- In-state travelers
- Sports groups and athletes
- Event-specific travelers
- University students and their families
- Conference and trade show 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 \$436 billion market in 2022, 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, workout studios, and outdoor activity options. Missoula claimed first place in SmartAsset's ranking of Most Fitness-Friendly Places in the Country in 2022—for the second consecutive year.

MUSIC AND ENTERTAINMENT

More than 32.5 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 evergrowing music and entertainment scene is the perfect fit for this niche market. Missoula's local concert management company, Logjam Presents, is consistently ranked among the top 100 promoters worldwide. The Logjam venues are locally adored and nationally acclaimed; Pollstar ranked the Wilma Theatre in the Top 100 Theaters worldwide, and KettleHouse Amphitheater ranked in the Top 50 Amphitheaters worldwide. Kettlehouse Amphitheater also landed #8 in Pollstar's rankings of the Top 100 Outdoor Amphitheaters, and was nominated for Outdoor Concert Venue of the year in 2022. With the allure of scenic outdoor concert settings like KettleHouse or Big Sky Amphitheater, we believe Missoula's music scene is going to continue to explode over the next few years. In fact, Pollstar listed Missoula as one of the Top 100 Concert Markets in the U.S. for 2023! Destination Missoula will actively partner with local music venues to promote their services to musicians, tour managers, and media affiliates. We will revisit our music-focused marketing to ensure that we're continually doing as much as possible to support the entertainment sector of our town. Our music website for Missoula— missoula.live—will continue to give people a comprehensive view of the music and entertainment experiences that Missoula offers.





MISSOULA AMONG BEST FOODIE CITIES IN AMERICA 2022

- *WalletHub*



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 \$153.9 million and supported the equivalent of 840 full-time jobs between July 2020, and June 2022. Missoula County has seen an economic impact of \$6.7 million. In 2020 we saw the hit series “Yellowstone” leave Utah to relocate its production to Missoula, bringing with it 527 permanent jobs in the state, 624 Montana residents employed as extras during filming, and more than \$70 million in additional spending to the state. 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

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

There are 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 diverse food scene from fine dining and cafés, to farm-to-table sustainability, ethnic cuisine, 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.



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. After decades of hiatus, the return of Missoula’s Annual Pride Week in June 2022, proved to be a great success. We witnessed an outpouring of community support for the lively, week-long festivities. Locals and visitors alike wait in enthusiastic anticipation for the next Pride Parade in June 2023.

22 SMALL LGBTQ-FRIENDLY CITIES IN THE US

- 2022 *QueerForty.com*



ADDITIONAL TARGET MARKETS



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 saw an increase in international arrivals, it was small - 22 million - still only 28% of 2019 volume. On average, each overseas traveler spends approximately \$3,700 and stays an average 17 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 market.



**THE MOST
BEAUTIFUL
COLLEGE TOWN IN
YOUR STATE**

- MSN October, 2022

UNIVERSITY OF MONTANA FAMILY AND RECRUITS

The University of Montana is located in Missoula and comprises 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 concert venues with compostable cups, plates and cutlery and recycle cans with readily available bins. Missoula’s community bus service, Mountain Line, now has 12 zero-emissions electric buses in their fleet as of 2022, furthering their goal to have a zero-tailpipe-emissions fleet by 2035. These buses proudly operate as “Zero-Fare”

transportation options—meaning no cost to the riders. They are also 100% ADA accessible and offer special routes and curb-to-curb services to ensure accessibility for all riders. The Office of Transportation offers free, convenient public transportation to the University of Montana through their UDASH routes. UDASH will expand its route in 2023 to reach more UM students, faculty, and staff for safe, sustainable transportation. In the summer of 2021, UM—backed by the support of several local organizations and the City of Missoula—launched a free river shuttle bus service, allowing river enthusiasts to hop on or off the bus every hour from noon to 6 pm, curbing excessive use of multiple river access points.

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**

- WalletHub 2022

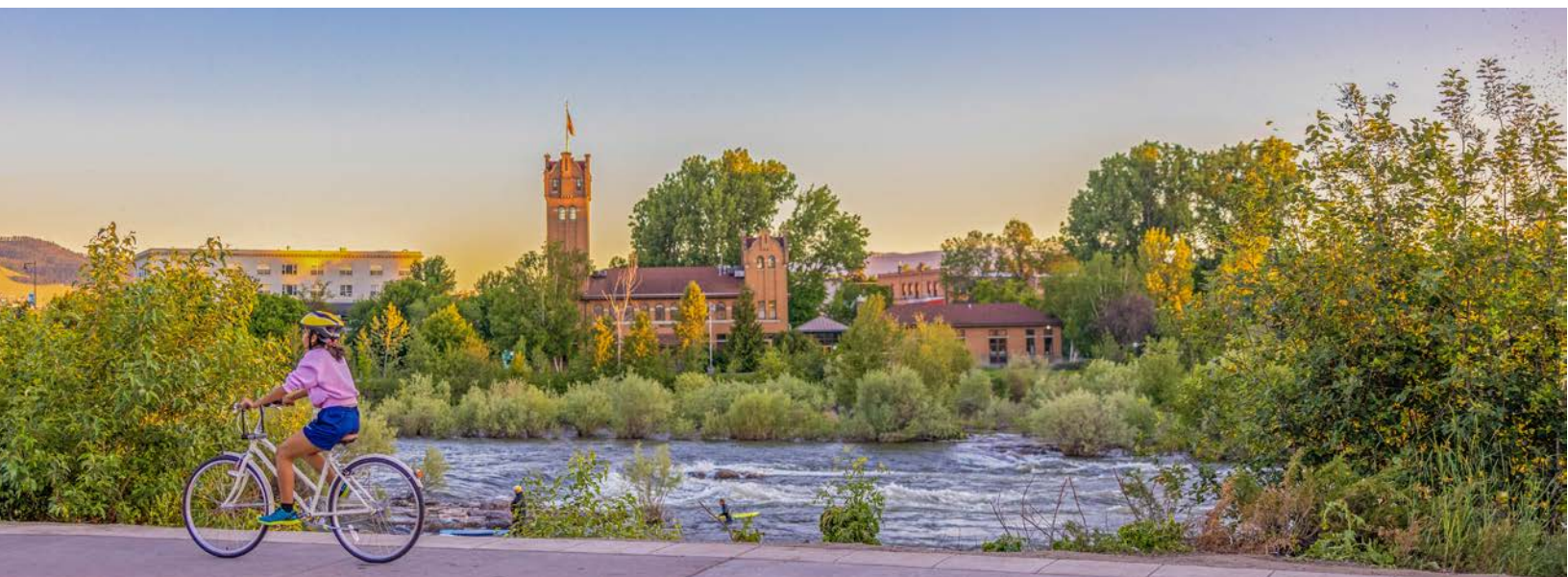
BIRDING

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

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 history—from historic downtown tours, river walks and tours of the Missoula Smokejumper's Center to walking portions of the Lewis and Clark trail. 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. The Higgins Street Bridge was recently renamed "Beartracks Bridge" to honor a prominent Salish family; visitors can find interpretive signs on the south end of the bridge to learn about the family and tribe's history. 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.



CULTURE

The indigenous peoples of the Missoula Valley now reside on the Flathead Indian Reservation, located between Missoula and Kalispell. The reservation is home to the Bitterroot Salish, Kootenai, and Pend d'Oreille tribes, with an estimated 65% of the total Confederated Salish and Kootenai population (approximately 7,753 enrolled members) residing there. The Confederated Salish and Kootenai Tribes are nationally recognized as leaders of an innovative, self-governed community. Their environment and natural resource departments, academic facilities, and their visitor education programs, all work to inform communities of the tribes' history and culture, about the land they are stewards of, and ways tribal members and non-members alike can respect the space and enjoy Montana's beauty, responsibly and peacefully. There are several tribal events open to the public throughout the year, including powwows, Indian Relay Races, and Fourth of July festivities. These events are deeply rooted in respect for their heritage, and provide critical cultural and historical perspective unlike many have encountered before. Visitors can learn about the culture of Montana's tribes at the Payne Family Native American Center on UM campus, which is the site of a historic Salish Indian encampment, and the first facility exclusively built for a Native American Studies Department and American Indian Services in the US. In addition to the cultural significance of the region's tribes, Missoula has been home to the Hmong people who settled in this community in 1976. Missoula was officially recognized as a resettlement community for refugees in recent years. This opportunity allowed Missoula to open its arms to a wide range of families and individuals seeking a safe environment to flourish in. People hailing from the Democratic Republic of the Congo, Eritrea, Syria, and Iraq have resettled in Missoula, and subsequently brought important, diverse cultural perspectives to our Montana town. Local organization, Soft Landing, has played a critical role in the resettlement process for refugees, and recently spear-headed "United We Eat"—a program that garnered national attention by celebrating cultural heritage through traditional meals cooked and sold by refugees in Missoula.

CANADIAN TRAVEL

In 2021, 2.5 million Canadians traveled to the United States, an 88% decrease from the 20.7 million in 2019. 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 has resumed our marketing efforts to Canada after taking a hiatus while the border was closed.



SUPPORTING RESEARCH

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

- Brand MT and Business Development – General Travel Statistics
- STR Reports – Missoula-Specific Hotel Statistics and competitive market analysis
- U.S. Travel Association – 2022 Forecast
(www.ustravel.org/research/travel-forecasts and Answer Sheet – (<https://www.ustravel.org/answersheet>)
- Destination Analysts
(www.destinationanalysts.com/insights-updates)
- Longwoods International Travel Sentiment Surveys and Research
(www.longwoods-intl.com/covid-19)
- Skift Travel Research - Global Travel Outlook 2023
Cision - 2022 State of the Media Report
(www.cision.com/resources/research-reports/2022-state-of-the-media)
- Institute of Tourism and Recreation Research - 2022 Interactive Data Reports for City of Missoula
- Institute of Tourism and Recreation Research - Montana Travel Regions & Counties - Economic Contribution of 2019/2021 Averaged Nonresident Travel Spending
- Canadian Government Travel Statistics
(www.statcan.gc.ca/start-debut-eng.html)
- U.S. Department of Commerce, Office of Travel & Tourism Industries – Canadian Travel Statistics
(www.travel.trade.gov/outreachpages/inbound.general_information.inbound_overview.html)
- Institute of Tourism and Recreation Research
(www.itrr.umt.edu/nonres/2018DomCanInterExpend.pdf)
- Future of Tourism Coalition
(www.futureoftourism.org)
- Center for Responsible Travel
(www.responsibletravel.org)
- Destination Stewardship Center
(www.destinationcenter.org)
- The Travel Foundation
(www.thetravelfoundation.org.uk)
- Sustainable Travel, Intl.
(www.sustainabletravel.org)
- University of Minnesota Tourism Research Reports – Sustainable Tourism
(www.tourism.umn.edu/ResearchReports/MarketSegments/Sustainable)

- Hoteliers – Hotel, Travel & Hospitality News – Report: More Affluent Travelers, More Women Setting Travel Trends (www.4hoteliers.com/features/article/8196)
- The Wandering RV - 70+ Female Travel Statistics and Trends (www.thewanderingrv.com/female-travel-statistics)
- Sports Events and Tourism Association - State of the Industry Report 2021 (www.sportseta.org/research/state-of-the-industry-report)
- Project Play, Aspen Institute - State of Play 2021 Report (www.aspenprojectplay.org/state-of-play-2021/introduction)
- Research and Markets - Culinary Tourism Market: Global Industry Trends, Share, Size, Growth, Opportunity and Forecast 2023-2028
- Skift.Com - The New Era of Food Tourism Trends and Best Practices for Stakeholders (www.research.skift.com/report/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 (www.ustravel.org/news/press-releases/comprehensive-culinary-travel-survey-provides-insightsfood-and-wine-travelers)
- Skift – Megatrends Defining Travel in 2022 (www.skift.com/megatrends-2022)
- About Tourism – Destination Marketing and the “FOOD” Element: A Market Overview (www.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)
- Kaplan University – Mapping the Study of Motorcycle Tourism (www.kaplanuniversity.edu)
- Motorcycle Tourism – Motorcyclists the PURE Tourist (www.slideshare.net/alig8r/motorcycle-tourism)
- ITRR - Motorcycle Touring in Montana: A Market Analysis
- Trekology.com/blogs/outdoors/top-7-outdoor-travel-trends-for-2023
- CMI Community Marketing & Insights – 24th Annual LGBT Tourism and Hospitality Survey (www.communitymarketinginc.com)
- Travel Weekly – Music Tourism Has Potential, But Industry Must Pick Up The Tempo (www.travelweekly.com/north-America-Travel/Music-tourism-has-potential-but-industry-must-pick-up-the-tempo)

ACHIEVING & MEASURING OUR GOALS

Our organization has identified four goals that guide our efforts throughout FY 2024 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 two of our three-year Strategic Plan completed in September 2021. These goals are:

DESTINATION MARKETING

Promote our destination with an emphasis on responsible travel messaging and increasing diversity and inclusion.

OBJECTIVES:

1. **Market to visitors with responsible travel messaging.**
 - Promote responsible travel messaging through traditional and innovative methods of marketing and platforms.
 - Use responsible travel messaging in the majority of all paid media campaigns.
2. **Increase diversity in marketing campaigns.**
 - Use diverse models reflective of our community in paid media campaigns (Diversity in age, ethnicity, gender, body shape, ability, etc.)

DESTINATION STEWARDSHIP

Balance the needs of visitors and residents through collaborative community engagement to create better visitor experiences, enhanced quality of life for residents and a more sustainable destination.

OBJECTIVES:

1. **Complete a Destination Stewardship Plan.**

(Timeline--started in March 2023 and will finalize in December 2023. Phase 1--Project Planning, Ongoing Management & Steering Committee Engagement March to December. Phase 2--Destination Assessment March to June. Phase 3--Stakeholder Engagement March to November. Phase 4 Visioning Workshop October. Phase 5--Destination Stewardship Plan Development October to November. Phase 6--Implementation Plan Development December.)

 - Complete destination and visitor research, host 8 focus groups and 4 community town hall events.
 - Present final Destination Stewardship Plan to the community.
 - Develop Destination Stewardship Implementation Plan.
 - Create Implementation Steering Committee.
2. **Focus on Community Alignment**
 - Arrange 6 meetings with community stakeholders and residents to educate about the benefits of tourism and overall destination management and stewardship.
 - Assist with recruitment efforts for the University of Montana through destination and brand awareness research.
 - Create and maintain partnerships with resource managers to collaborate around sustainable tourism initiatives.



DESTINATION MANAGEMENT

Gain a deeper understanding of our visitors and residents through research and use the research to better manage our visitation throughout the year.

OBJECTIVES:

- 1. Collect, analyze and expand visitor and resident data.** This information will help us define our visitor demographics, characteristics, time and flow throughout our community and their economic impact in order to hone our outreach. It will also help us to understand resource use by residents and non-residents in order to balance the needs of both. *We will use the data from the following research sources to generate reports at least quarterly to our boards to update them on trends and changes to our market, and to help us reevaluate our marketing and resource management strategies for FY24:*
 - Reports from KeyData, Smith Travel Reports (STR) and Institute for Tourism and Recreation Research (ITRR) on visitation, occupancy and Average Daily Rate (ADR) trends.
 - Reports regarding demographics of visitors to our Visitor Information Center (VIC), call center and website.
 - Reports from new tools such as Zartico and Key Data to understand where visitors originated, time spent and flow while in our community.
 - Complete Resident Sentiment survey and Community Assessment with MMGY.
 - Complete national visitor profile research with SMARInsights.
- 2. Maintain visitation in warm season and increase in the off season.**
 - Increase occupancy 1% from prior year (50.8%) during shoulder season (October-April).
 - Maintain occupancy from prior year (79.6%) during warm season (May-September).
- 3. Educate staff through professional development opportunities.**
 - Belong to Destination’s International in order to attend webinars, summits, Annual Convention, and more.
 - Attend the Montana Governor’s Conference on Tourism.
 - 100% of the full-time staff will attend at least two webinars, summits or conferences/conventions during FY 23-24.
 - Conduct an internal survey obtaining staff feedback and TBA satisfaction scores on the relevance and effectiveness of these professional development activities.

DESTINATION DEVELOPMENT

Work in collaboration with the Missoula Montana Airport to design and create an innovative airport visitor center.

OBJECTIVES:

- 1. Partner with the Missoula Montana Airport to provide additional funding and resources for the airport visitor information center.**
 - Contingent upon the progression of the architectural design completion by the Missoula, Montana Airport, determine where the new permanent visitor center will be located.
 - Research innovative display options.
 - Collaboratively create a design plan.





2023 – 2024 BUDGET

MOTBD Projection @ 100%	\$524,912.00
Uncommitted Funds @ Audit (under budget line items)	-0-
Rollover @ MOTBD	-0-

Please identify projects and amounts you would eliminate or reduce if revenue decreases by 10%. If revenue dropped by 5% (\$26,245.60) we would take it from Opportunity. If we need to drop an additional 5% to 10% we would take that portion from Paid Media as necessary.

The following budget is reflective of bed tax solely. These projects and others outlined in the narrative of the Destination Missoula 2023-24 Marketing Plan are also supported through other funding sources.

FY 2023-24 DESTINATION MISSOULA JOINT MARKETING BUDGET

NEW REVENUE	BED TAX
Collections FY 2023-24 - Projected	\$524,912.00
<i>New Revenue Total</i>	\$524,912.00
	\$524,912.00
EXPENSES	BED TAX
Administration	\$104,982.40
Agency Services	\$18,846.00
Earned Media	\$25,100.00
Education/Outreach	\$14,100.00
Marketing Resources	\$32,878.00
Opportunity	\$29,700.00
Paid Media	\$111,431.00
Product Development	\$10,000.00
Research	\$18,534.60
Visitor Services	\$117,400.00
Website Development	\$41,940.00
TOTAL EXPENSE	\$524,912.00
TOTAL INCOME	\$524,912.00
Net Income	\$0.00

DESTINATION
Missoula
MONTANA

