



WESTERN MONTANA'S
GLACIER COUNTRY

FY 2025 Operations Plan and Budget



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Introduction

This document outlines Glacier Country’s tourism operations plan and budget for fiscal year 2025. Our strategy is focused on preserving the natural beauty of Western Montana, promoting responsible travel and enhancing the visitor experience while ensuring that local communities thrive alongside tourism. This plan also reflects our commitment to sustainability and the long-term stewardship of Glacier Country.



COVER PHOTO
Libby. © CHRISTIAN SAWICKI

CSKT Bison Range. ©ANDY AUSITIN

About

Western Montana's Glacier Country is the officially recognized destination stewardship organization for our region including the eight counties of Flathead, Glacier, Lake, Lincoln, Mineral, Missoula, Ravalli and Sanders. Along with our in-region destination organization partners, our organization is essential to the economic and social well-being of the 75+ communities we represent, driving direct economic impact through the visitor economy and fueling development across the entire economic spectrum by creating familiarity, attracting decision-makers, sustaining air service and improving quality of life for the people who call this place home.

Mission

Western Montana's Glacier Country partners with our Western Montana communities to welcome visitors and support livelihoods while protecting quality of life, extraordinary outdoor resources and cultural heritage.

Vision

Western Montana's Glacier Country will be the leading destination steward of our region's cultural heritage and natural environment, balancing the quality of life of our residents with the quality of our visitor experiences

We create a destination organization plan yearly to:

BE an advocate for Western Montana

ENCOURAGE responsible tourism and recreation

ENHANCE experiences in rural communities

SHAPE demand and disperse visitors

FOSTER stronger stakeholder alignment and collaboration

Values Statement

We will passionately pursue our mission with honesty, integrity, equality and respect.

HONESTY Operate fairly and with transparency to earn the trust of public and private partners, members and the travel and tourism industry at large.

INTEGRITY Exercise sound judgment and leadership benefiting residents and visitors to Western Montana.

EQUALITY + RESPECT Celebrate and honor the diversity of Glacier Country's communities, cultures and natural beauty to foster a united sense of place.

These are the following qualities we value most:

- + Leadership/Integrity/Accountability
- + Collaboration
- + Stewardship
- + Inclusiveness/Diversity
- + Passion
- + Innovation
- + Travel/Adventure/Experience/Fun/Excitement
- + Community
- + Sustainability/Resilience

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Great Northern Powder Guides. © ANDY AUSTIN

Strategic Priorities for FY 2025

For 2025, our strategic priorities are to maintain a thriving visitor economy while ensuring Glacier Country remains a desirable place for residents to live and visitors to explore. These priorities are supported by a balance of tourism promotion, environmental stewardship and community collaboration. Our specific priorities include:

01

Balancing Economic Growth and Sustainability

Strengthening the visitor economy while protecting natural and cultural resources.

02

Enhancing Visitor Experience

Providing a high-quality, authentic experience that reflects the natural beauty and culture of Glacier Country.



Polson. ©CHRISTIAN SAWICKI

03

Improving Community Livelihoods

Supporting local economies by promoting tourism that benefits residents and businesses.

04

Collaborating With Local Stakeholders

Engaging with community leaders, businesses and organizations to ensure tourism supports local values.

05

Promoting Responsible Travel

Encouraging visitors to travel responsibly and protect the environment for future generations.

Strategic Roles and Tactics

Destination Marketing

Consumer Messaging: Glacier Country's messaging strategy is based on season, capacity of the community/ travel corridor and visitor experiences available. Depending on the targeted audience, our message will vary, with Recreate Responsibly messaging being a common theme. As an example, our 2024 campaign is called *Treasure it*.

“In the magnificent landscapes and vibrant small towns of Western Montana’s Glacier Country, it’s easier to breathe deeper, connect with nature and yourself, and find inner peace. Here, distractions fall away in the face of authentic experiences. Outside noise and influence quiet down. Here, you can truly *treasure* the moments that matter most.”

This campaign allows the imagery and people of the region to do the speaking. The campaign works with various targeted messaging to national and in-state consumers, weddings, meetings and conventions and is flexible enough to adapt to any potential challenges.

We use a comprehensive approach to connect with potential visitors, creating strong, emotionally resonant messaging that inspires them to envision a trip to Western Montana’s Glacier Country. We then provide the tools to spark that first step toward planning their adventure, whether through print or digital ads; trade show meetings with tour operators, travel agents or meeting planners; earned media in a magazine, webpage or blog; or engaging social media content.

We then offer several ways for potential visitors to learn more about the region, making it easy and intuitive to connect based on their preferences. Our diverse marketing approach includes options like ordering a travel guide from a print ad, exploring landing pages on our website specific to their interests through digital ads, and subscribing to our consumer and B2B blogs and e-newsletters for ongoing inspiration and updates.

We aim to make trip planning easy and enjoyable for our visitors. Travelers can request a free travel guide—available in both print and digital formats—and explore our webpage along with supporting microsites. These microsites cater to various interests, including group and international tours, meetings and conventions, film production, and destination weddings. They make it simple to connect directly with communities, businesses and attractions to craft the perfect itinerary. Additionally, our contact center is staffed with trained professionals who are available via live chat, email and phone for visitor assistance. For meeting planners, we assist with venue RFPs, site visits and vendor referrals. Itinerary assistance is provided to tour operators for both group and international markets. Logistics assistance and referrals are offered to those planning destination weddings.



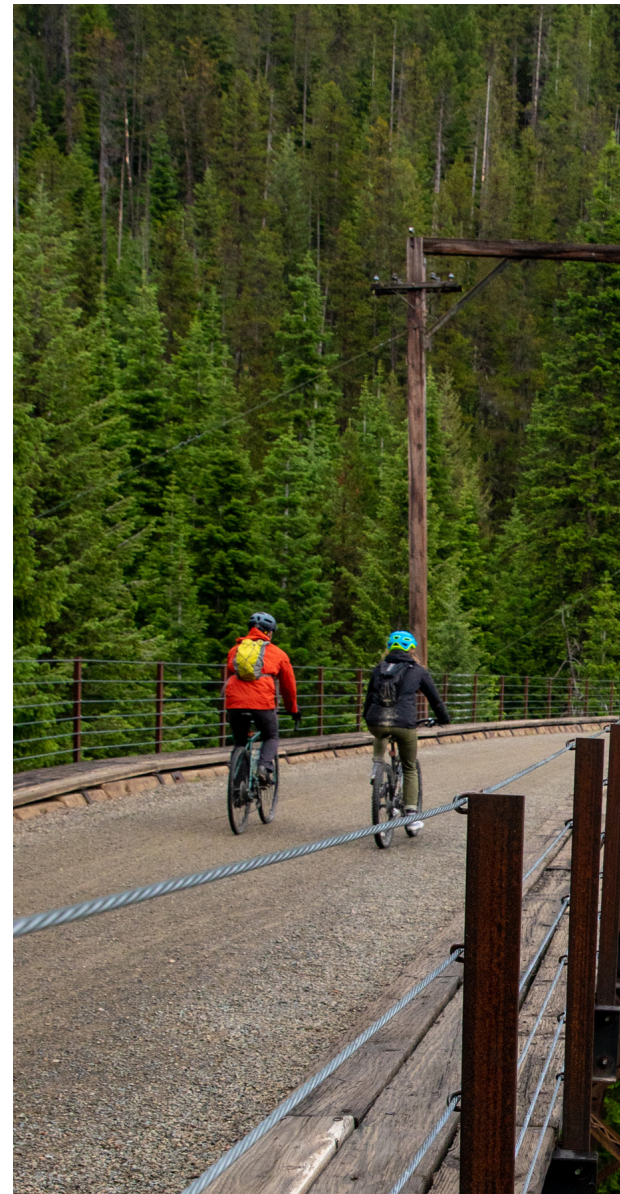
Film Promotion: The production of feature films, television series and commercials can generate significant economic activity for their host communities, drawing out-of-town spending, generating jobs and supporting local businesses.

The benefits to local communities from the film and entertainment industry are considerable. When a production shoots on location, it brings jobs, revenue and related infrastructure development, providing an immediate boost to the local economy. Film-induced tourism can affect travel decisions when potential tourists plan their upcoming holiday or visit to a destination. Films, documentaries, TV productions—like the “Yellowstone” series—and commercials inspire people to explore new destinations and experience locations seen in the content screened.

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

Communications: Our communications program develops, manages and monitors our publicity and earned media projects and programs. Every year, our publicity efforts result in a strong performance with travel writers, travel bloggers and digital influencers. They help share and spread our messaging, including highlighting lesser-known areas, off-season travel and promoting Recreate Responsibly messaging. We plan to continue our efforts with a support budget for trade media shows, media events, press trips and familiarization funding to be flexible and responsive for those we host and those we promote.

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



 Route of the Hiawatha. © ANDY AUSTIN



Thompson Chain of Lakes. © GLACIER COUNTRY

Destination Management

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

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

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



**RECREATE
RESPONSIBLY**

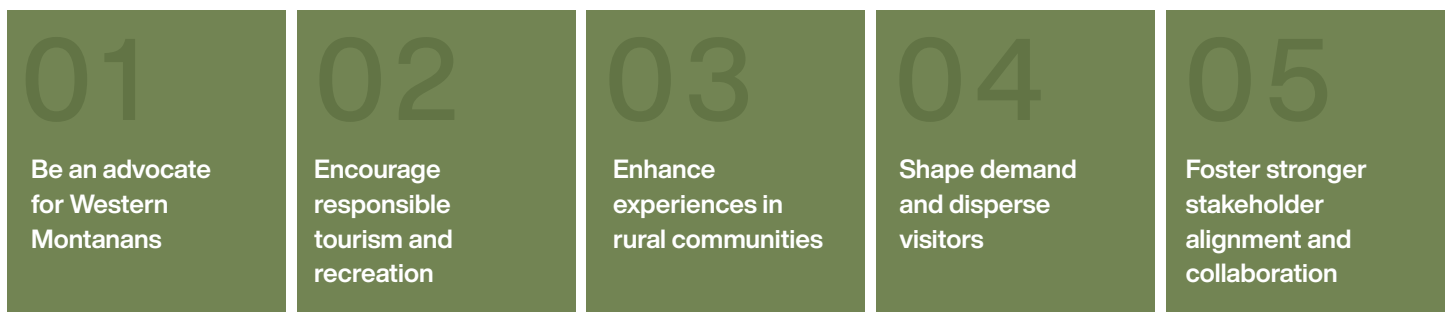
Destination Stewardship

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

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

Destination Stewardship: The core deliverable for our **destination stewardship plan** is a new strategic framework with five high-level goals and actionable initiatives for each to accomplish the vision for Western Montana's Glacier Country. The goals are interdependent and designed to collectively optimize the year-round economy and enhance the local community character and cultural DNA.

The **five strategic pillars** are:



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

Community Engagement: Western Montana's Glacier Country will continue to develop our **community engagement program** to build public support around a shared vision for the destination—balancing economic development, sustainable tourism and quality of life. As awareness of the tourism industry grows, positive and negative perceptions of it also grow. Montana's destination organizations, including Glacier Country, have mostly operated behind the scenes without telling our own story—sharing what we do, how we do it, why we do it and how we measure our success with qualitative and quantitative metrics.

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

Destination Development

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

Brand Strategy

In FY 2024, we went through a rebrand process to ensure our brand is both current and representative of who we are today and who we aspire to be. As we continue evolving—shifting from destination stewardship to destination leadership—it's crucial that our brand keeps pace. This rebrand offered the chance to reimagine how we present ourselves, creating a forward-thinking identity without the need for another overhaul in the near future.

A Brand Refresh

These pillars are what make us tick, deeply woven into our love for keeping Western Montana's Glacier Country as special as it is. Our stories are drenched in the grandeur, vibrance and adventurous spirit that our unique geography inspires. We welcome visitors, but there's more to it. We're big on looking after our postcard-perfect backyard, making sure every bit of its magic is there for future generations to discover. These brand pillars showcase what makes our region special and how we connect on a human level. They serve to help focus and guide our messaging to our audiences.

01 Enrich Community. Enhance Connection.

Western Montana's vibrant communities, local events and travel corridors are the heart and soul of our region, and they create real, lasting connections for the people who live here and for those who visit. By making sure everyone who comes into our corner of Montana feels welcome, we're building a place where community spirit and individual expression are valued. It's about more than just feeling good; it's about doing good—for Montana, for our quality of life and for our local economy. Our brand echoes the soul of Western Montana and the connections we make, fostering a sense of belonging that transcends boundaries.



Scillip. © CHRISTIAN SAWICKI

02 Celebrate Diversity. Encourage Inclusivity.

Our brand celebrates diversity. Diversity in landscapes, communities, people and cultures. We recognize each as a vital part of our history and our future. Western Montana's Glacier Country sits on the traditional, ancestral territory of the Amskapi Piikani, Ksanka, Sel'š and Qlispe' people. We honor the deep traditions of the Blackfeet Tribe and the Salish and Kootenai Tribes, and the rich tapestry of art, music, dance, storytelling, adventure, industry and leisure they provide today. Our commitment is to inclusivity, ensuring voices from all walks of life are heard and valued as we build a respectful and unified future together.



Mariah Gladstone with Indigikitchen in Babb. © ANDY AUSTIN

03

Seek Adventure. Sustain Nature.

Western Montana's four distinct seasons provide year-round adventures. By understanding our communities' unique offerings and seasonal capacity, we can customize marketing efforts and audiences to best serve the communities' and the region's goals. We seek to attract visitors who share our love for the outdoors, our hunger for new experiences and our devotion to protecting this unforgettable place. We provide inspiration, information and education to empower visitors and residents to be guardians of Western Montana and its delicate ecosystem.



Bitterroot River. © GLACIER COUNTRY

04

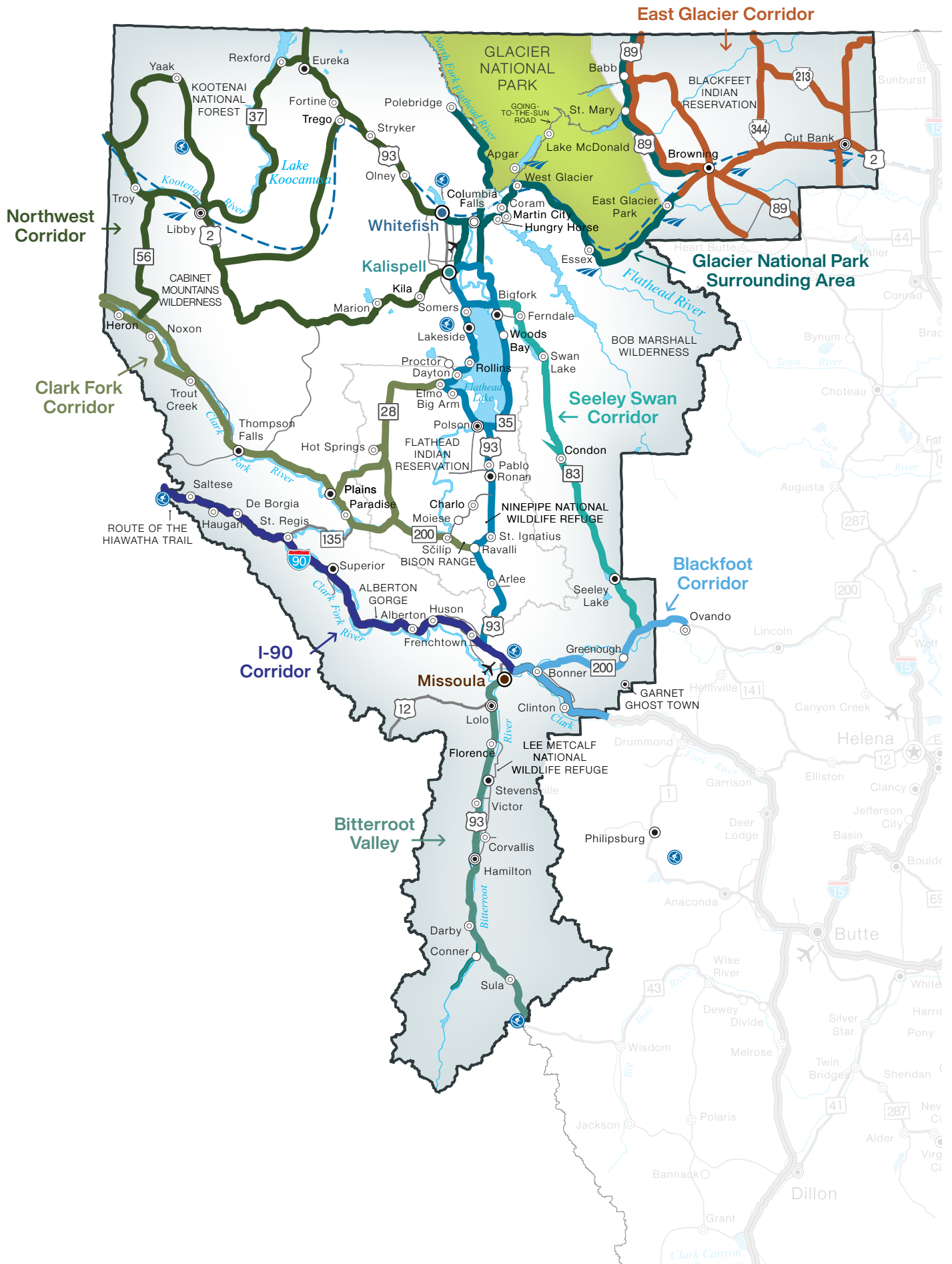
**Champion Stewardship.
Foster Partnerships.**

As stewards of the iconic landscapes that define Western Montana, we take immense pride in preserving these incredible treasures, like Glacier National Park and Flathead Lake. We are also committed stewards of the visitor experience, providing awe-inspiring moments and life-changing connections while sustaining our way of life and preserving our sense of place. Our unwavering commitment to leadership, partnership and preservation serves as our guiding inspiration, ensuring that these invaluable treasures are safeguarded, in their purest form, for future generations to enjoy.



St. Mary Overlook. © ANDY AUSTIN

Glacier Country's new brand aligns nicely with Destination Montana's marketing and strategic goals and the regional resiliency plan we recently completed as part of Montana's resiliency planning efforts. All three align to ensure the visitor economy is relevant and its benefits are felt at the grassroots level in every community.



Destination

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

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

- + **Geographic size:** 22,000 square miles
- + **Population:** 380,000
- + **Largest communities:** Missoula, Kalispell, Whitefish and Hamilton
- + **Average February temperatures:** High of 36 degrees Fahrenheit and low of 16 degrees Fahrenheit
- + **Average July temperatures:** High of 82 degrees Fahrenheit and low of 48 degrees Fahrenheit
- + **Tribal Nations:** Western Montana's Glacier Country is on the traditional, ancestral territories of the Sel'š (Salish or "Flathead"), Ksanka (Kootenai), Qlispe' (upper Kalispel or Pend d'Oreille), and Amskapi Piikani (Blackfeet) peoples.
- + **Rural Travel Corridors:**
 - + **Bitterroot Valley:** Lolo, Florence, Stevensville, Victor, Corvallis, Hamilton, Darby, Conner, Sula
 - + **Blackfoot Corridor:** Bonner, Clinton, Greenough, Ovando
 - + **Clark Fork Corridor:** Scilip, Paradise, Plains, Thompson Falls, Trout Creek, Noxon, Heron, Hot Springs
 - + **East Glacier Corridor:** Browning, Cut Bank, East Glacier Park, Heart Butte, St. Mary, Babb
 - + **Flathead Corridor:** Arlee, Ravalli, St. Ignatius, Moiese, Charlo, Ronan, Pablo, Polson, Big Arm, Elmo, Dayton, Proctor, Rollins, Lakeside, Somers, Bigfork
 - + **Glacier Park Surrounding Area:** Babb, Columbia Falls, Coram, East Glacier Park, Essex, Hungry Horse, Martin City, Polebridge, St. Mary, West Glacier
 - + **I-90 Corridor:** Frenchtown, Huson, Alberton, Superior, St. Regis, De Borgia, Haugan, Saltese
 - + **Northwest Corridor:** Marion, Kila, Libby, Troy, Yaak, Rexford, Eureka, Fortine, Trego, Stryker, Olney
 - + **Seeley Swan Corridor:** Bigfork, Ferndale, Swan Lake, Condon, Seeley Lake



Columbia Falls. © NOAH COUSER

Strengths

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

Spectacular Unspoiled Nature

- + Glacier National Park
- + Rocky Mountains, with several smaller mountain ranges
- + Geological features (Glacial Lake Missoula)
- + Wildlife
- + CSKT Bison Range
- + Montana state parks
- + National forests
- + Bob Marshall Wilderness Complex (Great Bear, Bob Marshall and Scapegoat wildernesses)
- + Cabinet Mountains Wilderness
- + Selway-Bitterroot Wilderness
- + Mission Mountains Wilderness
- + Rattlesnake National Recreation Area & Wilderness
- + Flathead Lake
- + Lakes and rivers
- + International Dark Sky Park designation, stargazing, northern lights

Vibrant and Charming Small Towns

- + Art galleries
- + Artisan tours and events
- + Explorer and national historic trails: Lewis and Clark, David Thompson, John Mullan, Nez Perce Trail, Pacific Northwest Scenic Trail
- + Historic “red buses” of Glacier National Park
- + Historic sites
- + Historic St. Mary’s Mission
- + Main-Street businesses
- + Museums
- + Live music
- + Railroad history
- + Shared border with Canada
- + Live theater
- + Two American Indian reservations/native cultures and history



Experiences

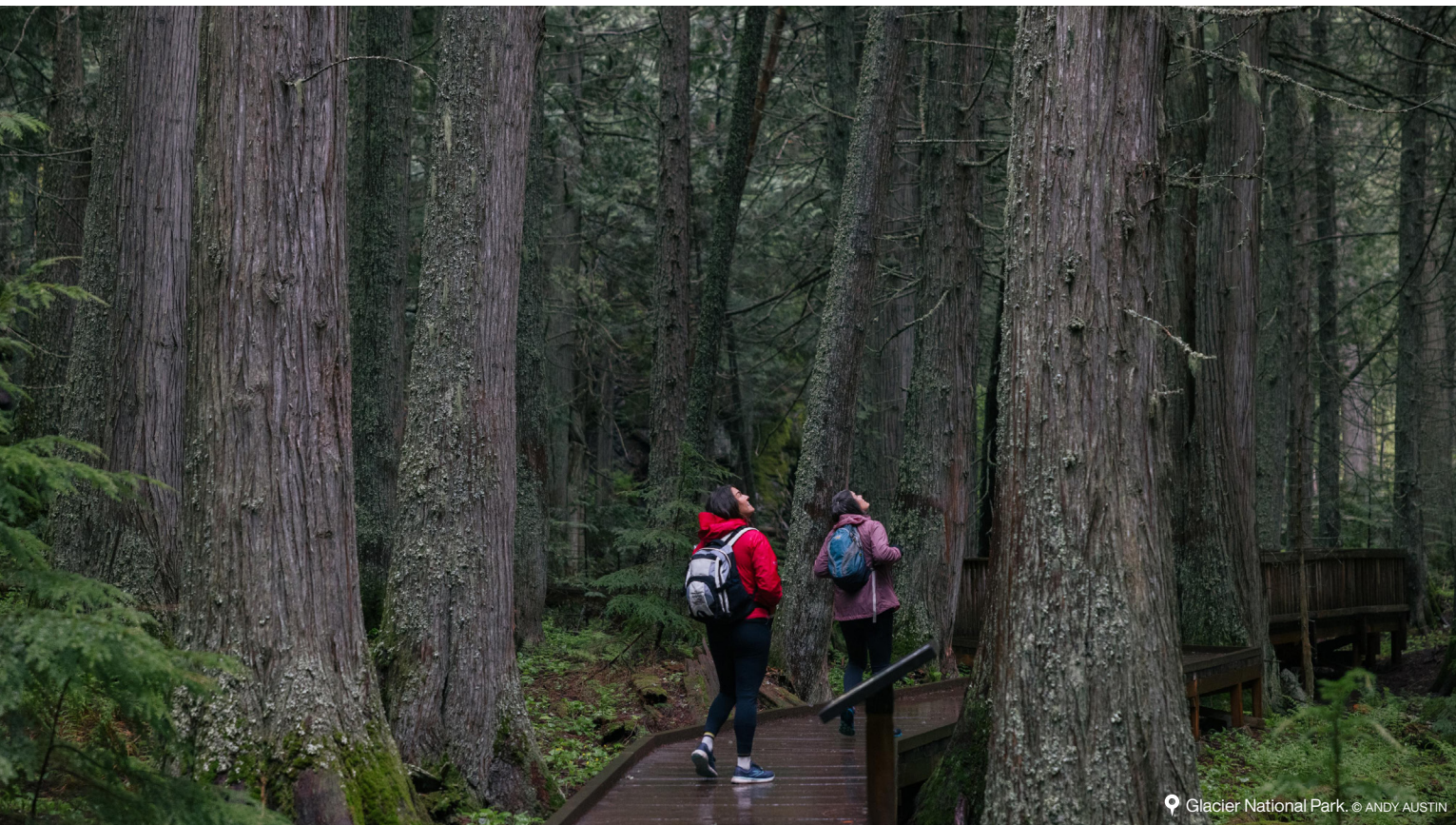
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|----------------------------|-------------------------|-----------------------------------|
| + Agricultural experiences | + Golfing | + Rafting |
| + American Indian cultures | + Hiking | + River surfing |
| + ATVing | + Historic sites | + Rodeos |
| + Biking and cycling | + Horseback riding | + Running events and competitions |
| + Birding | + Kayaking and canoeing | + Scenic flights |
| + Boating | + Llama trekking | + Skijoring |
| + Camping and RVing | + Montana state parks | + Sleigh rides |
| + Destination learning | + Motorcycle touring | + Snowmobiling |
| + Dog sledding | + Mountain biking | + Sportsman adventures |
| + Downhill skiing | + Nordic skiing | + Stand-up paddleboarding |
| + Festivals/music | + Pow wows | + Stargazing |
| + Fishing | + Public art | |

Hospitality

- | | | |
|-------------------------------|-------------------------------------|--|
| + Blackfeet Community College | + Farm-to-table restaurants | + Special event venues (entertainment) |
| + Breweries | + Flathead Valley Community College | + University of Montana |
| + Cideries | + Meeting and convention spaces | + Visitor information centers |
| + Dining | + Missoula College | + Wedding venues |
| + Distilleries | + Salish Kootenai College | + Wineries |
| + Farmers markets | | |

Abundant Lodging and Camping (independent, brand and boutique)

- | | | |
|---------------------------|---------------------|---|
| + Bed-and-breakfasts | + Geodomes | + Resorts |
| + Bicycle accommodations | + Glamping | + Tiny homes |
| + Boutique accommodations | + Hostels | + Teepees and yurts |
| + Cabins | + Hot springs | + Treehouses |
| + Camping/RV | + Hotels and motels | + University residence halls |
| + Chalets | + Lodges | + Vacation homes and short-term rentals |
| + Condominiums | + Ranches | |



Opportunities

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

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

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

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

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



Alberton Gorge. © ANDY AUSTIN

Potential Challenges

In 2024, we revisited our communities—holding eight meetings, one for each county—sharing our stewardship plan and listening to challenges and opportunities. Through our community engagement program, we continue to stay informed and engage with partners on the latest issues and leverage available resources when possible and appropriate. These resources include the launch of our new brand; accuracy in our brand messaging and imagery used; staying abreast of new marketing trends and opportunities; maintaining a positive tone and message in our publicity and social media efforts; working with our partners to understand the concerns and impacts our industry has at a local, statewide and national level; and assisting financially, when possible, while knowing that our ultimate mission is to create demand for the tourism product our businesses and communities supply.



Lone Pine State Park, Kalispell. © GLACIER COUNTRY



Identified Challenges

- + **Resident sentiment towards tourism and new residents** – In 2023, 30% of residents felt there were too many visitors during peak season, creating tensions between residents, visitors and new residents. While visitor numbers have leveled, sentiment remains a concern.
- + **Community capacity** – Workforce shortages and lack of affordable housing, especially during peak months, strain businesses and diminish the visitor experience, making it harder for residents to enjoy their communities.
- + **New recreationists and poor visitor behavior** – New visitors and residents often lack knowledge about responsible recreation. Education on sustainable practices is critical to improving behavior.
- + **Affordable housing** – Housing affordability remains a problem due to low inventory, high prices and rising costs, affecting both workforce availability and the cost of living.
- + **Workforce shortages** – Staffing shortages in the hospitality industry are impacting service levels, exacerbated by H-2B and J1 work visa caps, which limit the availability of nonimmigrant workers.
- + **Vehicle reservation system in Glacier National Park** – Visitor awareness of the changing reservation system is critical to improving the park experience and spreading out visitation across the region.
- + **Overcapacity in Glacier National Park during non-reservation hours** – Despite access before 6 a.m. and after 3 p.m., peak season overcapacity remains an issue, frustrating visitors.
- + **International travel recovery** – International visitors face difficulties with Glacier National Park's reservation system, which complicates their travel plans and may push them toward other destinations.
- + **Meetings and conventions recovery** – The meetings industry is rebounding with longer booking windows, though high travel and lodging costs are still a challenge.
- + **Social inclusion** – Social inclusion is crucial for building a more just and cohesive community where everyone feels welcome. Promoting social inclusion within tourism strengthens organizations by bringing diverse perspectives and improving the visitor experience for all backgrounds.
- + **Airline challenges** – Despite growth in commercial airline capacity, high airfare costs and staffing shortages remain issues. Ongoing airport expansions are in progress.
- + **Climate change and weather impacts** – Changing weather patterns, wildfires and environmental damage threaten tourism and can deter visitors due to safety concerns and smoky skies.



 Stevensville. © ANDY AUSTIN

- + **Crisis management and traveler education** – Ongoing crises, like wildfires and community capacity challenges, require consistent outreach and education efforts.
- + **Economic fluctuations** – Montana’s high costs may cause visitation to plateau or decline, especially in the face of economic uncertainties.
- + **Emerging markets** – New visitors unfamiliar with outdoor recreation norms present challenges. The growing “bleisure” market (mixing business and leisure) is an opportunity.
- + **Public lands infrastructure** – Infrastructure issues on public lands, compounded by funding fluctuations, can affect the visitor experience, emphasizing the need for clear communication.
- + **International issues** – Global instability and rising costs deter some travelers from visiting the U.S., impacting Glacier Country’s tourism numbers.
- + **Market competition** – With urban and international travel rebounding, we need to stay competitive by targeting responsible visitors and promoting off-peak opportunities.
- + **Public transportation** – Public transit options between cities and attractions remain limited in many parts of the region, affecting visitor access.
- + **Shared economy accommodations** – The rise of short-term rentals boosts visitor capacity but reduces long-term housing for local workers.
- + **Social media algorithm changes** – Ad blockers, evolving platform demographics, and privacy laws are reshaping digital marketing, requiring us to stay adaptive and innovative.
- + **Broadband infrastructure** – Access to broadband is vital for economic growth and workforce development, especially with the rise of remote work.
- + **Federal government closures** – Federal furloughs and closures disrupt access to public lands, making communication strategies crucial for visitor awareness.
- + **Tribal and federal land closures** – Land closures due to emergencies or crises can have significant social and economic impacts, requiring proactive communication.
- + **DMO funding for destination stewardship** – Maintaining the 4% Lodging Facility Use Tax is critical for addressing the balance between resident quality of life and visitor experience.
- + **Perception of Glacier National Park’s accessibility** – Many visitors believe the park is only open when Going-to-the-Sun Road is fully accessible, making it essential to promote the park’s year-round appeal.
- + **Awareness of destination organizations** – We must continue building awareness of our role in sustainable tourism and overcoming misconceptions about our impact.



Our Audiences

Glacier Country wants to attract people who first and foremost respect the people who live here and the lifestyle we treasure. Our communities enjoy the visitor spending, which stimulates our economy and provides opportunity for growth. Sustainable growth relies on the alignment of interests and characteristics of those who live here and those who are visiting.

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

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

Demographics

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

Geographics

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

Psychographics

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





 Ronan. © GLACIER COUNTRY

Supporting Research

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

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

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



📍 Garden of One Thousand Buddhas. © ANDY AUSTIN



2023 NONRESIDENT VISITATION, EXPENDITURES & ECONOMIC IMPACT ESTIMATES

by Kara Grau, Institute for Tourism and Recreation Research

In 2023, 12.5 million nonresident visitors to Montana spent an estimated \$5.45 billion in the state.

This \$5.45 billion in local spending directly supports \$4.84 billion of economic activity in the state, and supports an additional \$3.37 billion of economic activity, indirectly.

The estimated total contribution of nonresident spending to Montana's economy was \$8.21 billion in 2023.

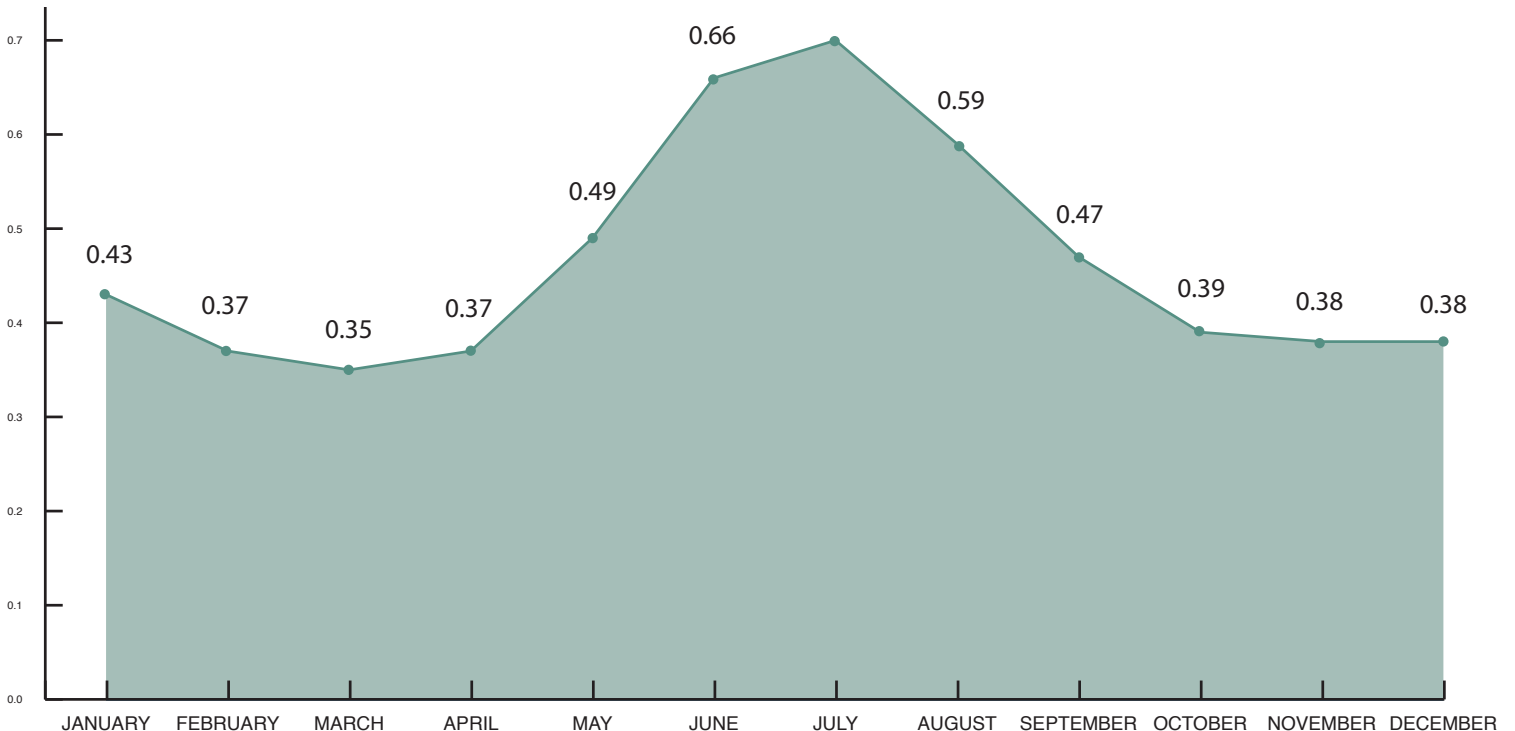
REGIONAL VISITOR TO RESIDENT RATIO (2022 VS. 2023)

Source: ZARTICO Geolocation Data

- + **Yearly Average:** .50 or 50 visitors to 100 residents (down 8% over 2022)
- + **Seasonal Average:**
 - + January to March – .41 or 41 visitors to 100 residents (up 21% over 2022)
 - + April to June – .54 or 54 visitors to 100 residents (down 2% over 2022)
 - + July to September – .67 or 67 visitors to 100 residents (down 16% over 2022)
 - + October to December – .41 or 41 visitors to 100 residents (up 15% over 2022)

Visitor to Resident Ratio by Month

Percentage of visitors vs. residents (with residents at 1.0) per month







Blodgett Canyon Overlook. © GLACIER COUNTRY

REGIONAL LODGING DATA (2023)

Hotels Source: *Smith Travel Reports*

- + Average Daily Rate: \$164
- + Occupancy: 59.6%

Short Term Rentals Source: *KeyData*

- + Average Daily Rate: \$266
- + Occupancy: 23.8%

REGIONAL AIRPORT DATA (2023)

Missoula Montana Airport (MSO)

- + Deplanements: 454,037

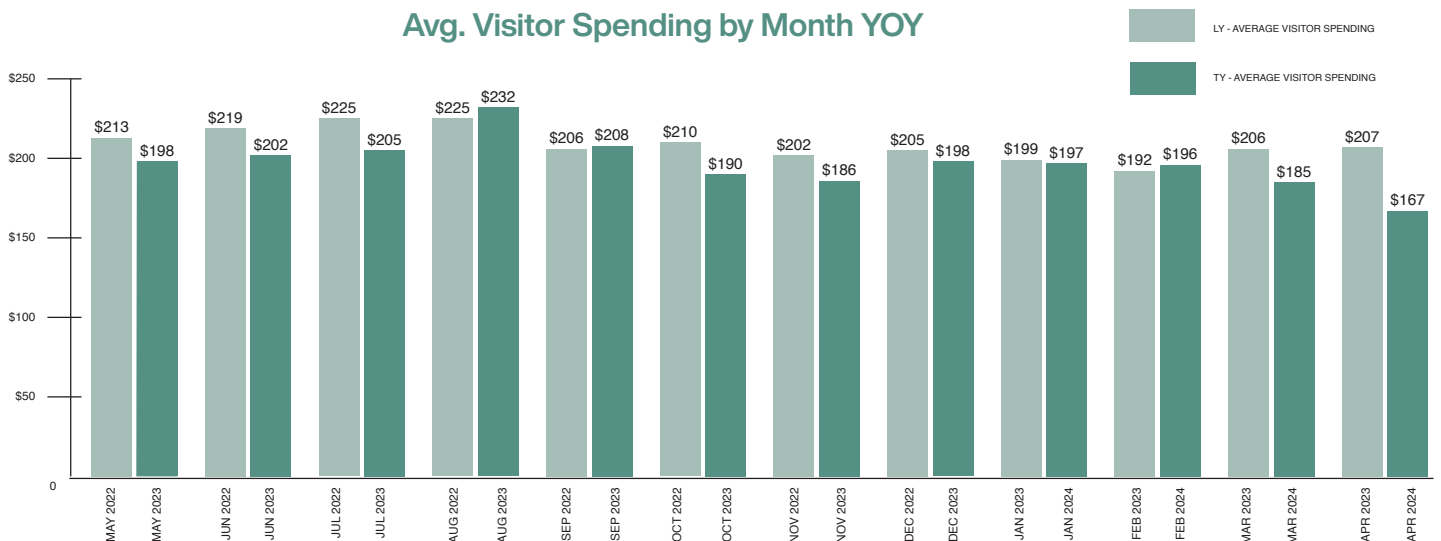
Glacier Park International Airport (FCA)

- + Deplanements: 440,171

AVERAGE VISITOR SPEND BY MONTH (YOY - MAY 2023 to APRIL 2024)

Source: *Zartico - Affinity Group*

Avg. Visitor Spending by Month YOY





Ronan. © CHRISTIAN SAWICKI

THE VALUE OF STEWARDSHIP

by Jack Johnson, Destinations International

In 1983, the United Nations tapped former Norwegian prime minister Gro Harlem Brundtland to run the new World Commission on Environment and Development. After decades of effort to raise living standards through industrialization, many countries were still dealing with extreme poverty. It seemed that economic development at the cost of ecological health and social equity did not lead to long-lasting prosperity. It was clear that the world needed to find a way to harmonize ecology with prosperity.

After four years, the “Brundtland Commission” released its final report, “Our Common Future.” It famously defines sustainable development as development that meets the needs of the present without compromising the ability of future generations to meet their own needs. The intent of the definition was to unify environmentalism with social and economic concerns on the world’s development agenda. Sustainability is a holistic approach that considers ecological, social and economic dimensions, recognizing that all must be considered together to find lasting prosperity.

When we speak of sustainability as a value of destination organizations, we refer to this holistic definition. It is not just the environment, but also the economic and social structure of our communities.

Environmental Sustainability, when maintained, means all of our community’s environmental systems are kept in balance while natural resources are consumed at a rate that allows them to replenish themselves.

Economic Sustainability means that communities across the globe can maintain their independence and have access to the resources that they require, financial and otherwise, to meet their needs. Economic systems are intact, and activities are available to everyone to secure sources of livelihood.

Social Sustainability means that universal human rights and basic necessities are attainable by all people. They have access to enough resources to keep their families and communities healthy and secure. Healthy communities have leaders who ensure personal, labor and cultural rights are respected, and all people are included, treated equitably and protected from discrimination.

The motivations behind sustainability are often complex, personal and diverse, and the definition of sustainability is intentionally broad. For sustainability to remain a relevant value, concept and tool, it is important that each industry adapt a definition to our own context. Furthermore, each destination organization must do the same.

In 2019, Destinations International’s Destination NEXT Futures Study identified, along with community alignment and digital conversion, destination stewardship as one of three industrywide transformational opportunities that destination leaders need to leverage collectively to effectively lead their organizations today.

The study spoke of building public-sector coalitions between the visitor industry, economic development agencies, academic institutions, and civic and philanthropic organizations. The goal is to curate more immersive destination experiences, manage sustainable visitor growth, promote equitable economic development, and elevate quality of life and quality of place.



Seeley Lake. ©LYMAN GILLEN

THE STATE OF THE AMERICAN TRAVELER – DESTINATION DECISIONS 2024

by Miles Partnership and Future Partners

While travelers' personal financial sentiments remain a top concern as they map out their travel plans for 2024, certain household incomes remain unaffected by current travel prices. Travelers living in large cities with an annual HHI of \$100K or higher feel that now is a good time to spend on travel.

Excitement for leisure travel remains high, with over 87% of U.S. travelers already having trips planned in 2024. This year, travelers are expected to take an average of 3.6 leisure trips in the next 12 months, and 52% intend on prioritizing travel spending in the next three months.

74.7% of travelers agree that when choosing a destination to visit, affordability is the most important and desired information, including lodging costs, transportation and food.

When asked how destinations could best reach them during their travel planning, 34.8% of travelers said email, while 34% preferred websites found via search engine. Just over one-third of all travelers have used online video to plan their travel in the last year and, unsurprisingly, Millennials and Gen Z take the lead in online video usage.



Chief Joseph Pass. © TRAVELINGMEL



Blackfeet Dancers. © ANDY AUSTIN

THE STATE OF THE AMERICAN TRAVELER – DESTINATION STEWARDSHIP EDITION 2024

by Miles Partnership and Future Partners

Perceptions around high travel costs and expenses remain top deterrents to leisure travelers from traveling more than they would have otherwise preferred this year. The majority of travelers say that in general, travel is too expensive right now (38.5%), personal financial reasons have kept them from traveling (37.1%), gasoline is too expensive (32.3%), and airfare is too expensive (25.8%). Despite this, Americans are still excited about travel, with 54% saying travel will be a budget priority in the next three months.

The percentage of American travelers that feel travel has an overall negative impact on the environment is slightly down from last year (23% in 2022 vs. 20% in 2023). There is an uptick in the consideration of environment and community while traveling, especially among Gen Z and Millennials. Top concerns include plastic waste, crowding and congestion in communities, energy consumption and increasing costs for residents.

The belief that tourism improves communities is at an all-time high. 46% of Americans agree with the statement that “tourism in my community makes it a better place to live.” Again, we see that higher income groups are more likely to agree with this statement.

Overall, the outlook around green initiatives, adjusted travel habits and community sentiment paint a positive picture of inspired action as we look toward the future. Leisure travelers are more willing to pay more for hotels with green programs (35%) and plan to travel closer to home (22%) or explore their own destinations (17%) to lower the impact of their travels on the climate and communities.



Kootenai River. © ANDY AUSTIN

THE STATE OF THE AMERICAN TRAVELER IN MARCH 2023

by Destination Analysts

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

EMERGING MARKETS

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

Our communities have changed their target customer a bit—they seek “preferred” visitors over “high value” visitors, with each community/county identifying the preferred visitor a little differently. For example, the high-spending visitor is not at the top of the preferred list as it once was; at the top are visitors who are respectful of the people who live here and respect our natural resources. We also continue to hear that Montanans, Canadians and international visitors are viewed as preferred visitors. We will work hard to increase the rate of return for these segments.

Bleisure travel refers to the blending of business and leisure activities during a single trip. This trend has been steadily growing as more professionals seek to maximize their travel experiences. Montana, renowned for its breathtaking natural landscapes and outdoor recreational opportunities, is poised to capitalize on the bleisure travel trend due to its ability to offer both productive business environments and rejuvenating leisure activities in the same destination, appealing to travelers seeking a balance between work and relaxation.



St. Ignatius Mission. © ANDY AUSTIN



Whitefish. © CHRISTIAN SAWICKI



Overall Goals and Objectives

Goals

Our **goal** is to balance a thriving visitor economy with our communities' long-term health and vibrancy.

01

Monitor Sales and Marketing Effectiveness

We aim to assess how well our sales and marketing efforts are performing. This includes tracking the results of our paid media campaigns, social media engagement, website analytics, influencer partnerships and business-to-business (B2B) leads. Additionally, we will measure the performance of our call center and travel guide usage.

03

Monitor Visitor Lodging and Resident Sentiment

We want to understand how loss and growth of hotel lodging and short-term rentals (e.g., vacation rentals) are affecting our communities. At the same time, it's important to gauge how residents feel about tourism.

02

Implement the Destination Stewardship Plan

We are committed to advancing the 33 initiatives identified in our destination stewardship plan, which addresses community needs and solutions. Our objective is to support our communities with data, research and funding where applicable.

04

Track Visitor Data and Economic Impact

Visitor trends and their economic contributions are essential for the success of our region.



Seeley Lake Trails. © JONATHAN FINCH

Objectives

01

Build and/or maintain awareness of Glacier Country and its communities as a recognized tourism destination in identified markets and audiences in a way that balances and sustains visitation among resident, nonresident, domestic and international travelers based on seasonal capacity.

02

Encourage residents and visitors to be good stewards of our home by traveling responsibly.

03

Monitor and track the characteristics and behaviors of visitors to Glacier Country.

04

Monitor resident sentiment toward tourism.

05

Identify, monitor, participate in and support efforts around the social, economic and environmental impacts of tourism on our communities and region.

06

Continue to execute and expand the community engagement program.

Budget

Financial Breakdown of Key Spending Areas

Our total budget for FY 2025 is \$4.975 million, strategically allocated across several key areas to support marketing, community engagement, visitor services, and sustainability efforts. Here's a breakdown of our spending:

This budget prioritizes marketing efforts to attract responsible visitors, support sustainable tourism, and enhance community and visitor services.

Category	Amount Budgeted	% Budgeted
Administration	\$800,000.00	16.08%
Joint Ventures	\$150,000.00	3.02%
Opportunity Marketing	\$100,000.00	2.01%
Cooperative Marketing	\$50,000.00	1.01%
Marketing Personnel	\$355,000.00	7.14%
Agency Services	\$500,000.00	10.05%
Marketing Resources	\$80,000.00	1.61%
Paid Media	\$1,200,000.00	24.12%
Earned Media/Tourism Sales	\$381,000.00	7.66%
Website Development (Online, Website, Mobile)	\$150,000.00	3.02%
Education/Outreach	\$210,000.00	4.22%
Travel/Trade Shows	\$80,000.00	1.61%
Research	\$155,000.00	3.12%
Product Development	\$470,000.00	9.45%
Visitor Services	\$294,000.00	5.91%
TOTAL BUDGET	\$4,975,000.00	100.00%

Projected Visitation

Along with strong visitation from Montana residents, we project approximately 12.5 million nonresident visitors for FY 2025. While overall visitor numbers are expected to remain steady, our strategy is focused on dispersing visitation more evenly—both throughout the year and across lesser-known areas—to help reduce pressure on high-traffic destinations such as Glacier National Park.

Conclusion

Glacier Country's FY 2025 operations plan focuses on sustainable growth, community engagement and enhancing the visitor experience. By fostering collaboration, promoting responsible travel and protecting our natural and cultural resources, we aim to ensure that Glacier Country remains a cherished destination for generations to come.





 WESTERN MONTANA'S
GLACIER COUNTRY