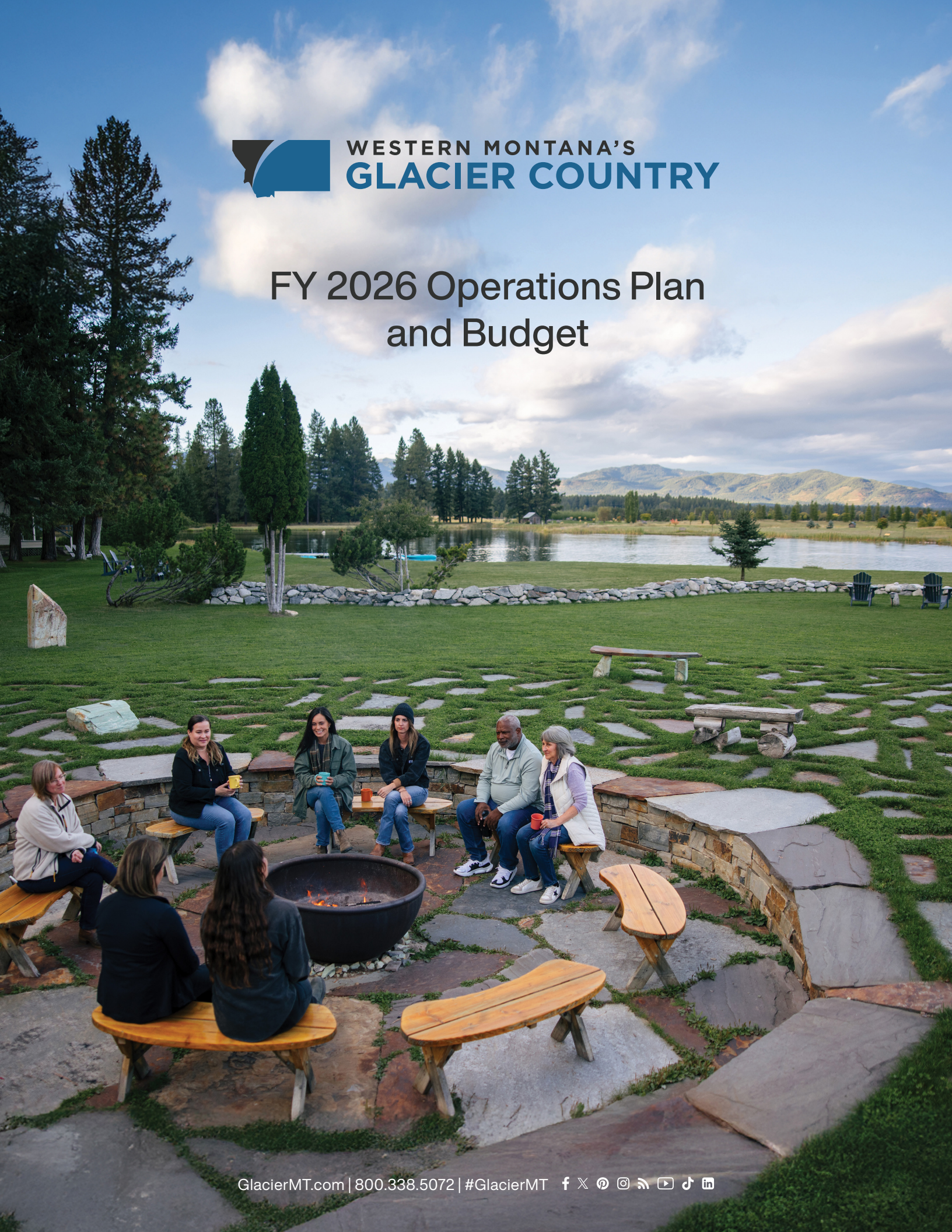




WESTERN MONTANA'S
GLACIER COUNTRY

FY 2026 Operations Plan and Budget



Contents

Introduction..... 2

Strategic Priorities for FY 2026..... 4

Strategic Roles and Tactics..... 6

 Destination Marketing 6

 Destination Management..... 8

 Destination Stewardship 9

 Destination Development 9

Brand Strategy..... 11

Destination13

Strengths14

Opportunities..... 16

Potential Challenges.....17

Identified Challenges18

Our Audiences.....21

Supporting Research..... 23

Overall Goals and Objectives 33

Budget..... 34

Projected Visitation..... 35

Conclusion..... 35



Introduction

This document outlines Glacier Country’s tourism operations plan and budget for fiscal year 2026. 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
Dancing Spirit Ranch. © ANDY AUSTIN

Daly Mansion. © GLACIER COUNTRY

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

Racene Friede, President CEO

Kristi McNeal, Director of Operations and Accounting

Lucy Guthrie Beighle, Director of Communications

Debbie Picard, Director of Sales

Aerionna Skrutvold, Marketing Project Manager

Western Montana's Glacier Country

PO Box 17631

3021 Palmer, Suite A

Missoula, MT 59808

406.532.3234

gcexec@glaciermt.com



Montana Museum of Art and Culture. © ANDY AUSTIN

Strategic Priorities for FY 2026

For FY 2026, our primary goals are to maintain a thriving visitor economy while ensuring that Glacier Country remains a desirable place for residents to live and visitors to explore. These objectives are supported by a balance of tourism promotion, environmental stewardship, and community collaboration. Our specific goals 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.



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. A common theme of our messaging is to recreate responsibly.

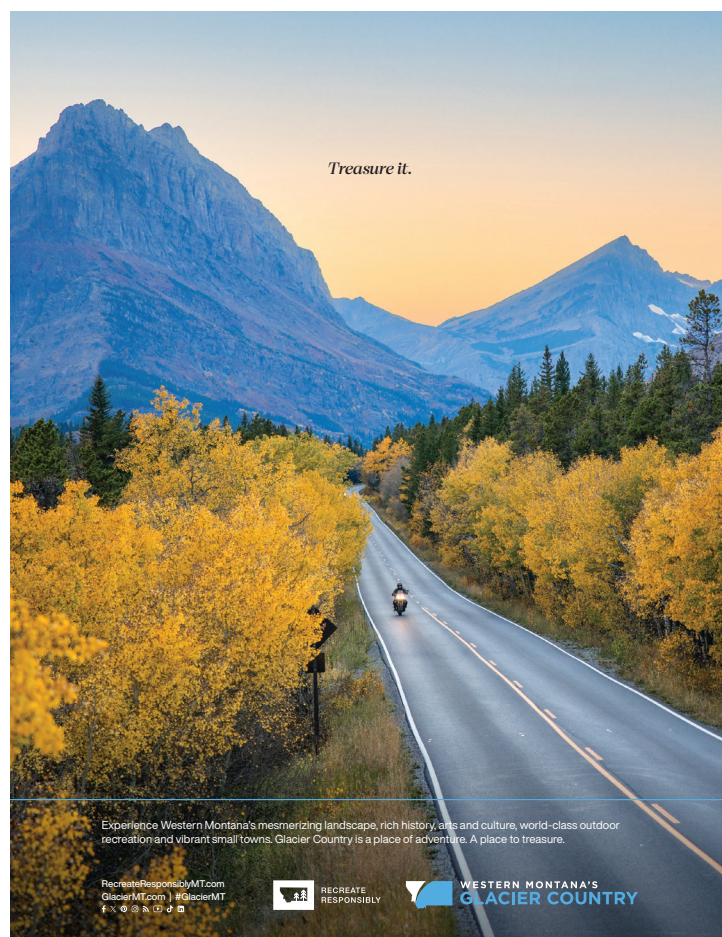
We employ a full array of tactics that inspire an emotional connection using strong creative messaging for the potential visitor. We then provide them with the tools they need to take that first step toward action, which is to start thinking about a trip to Western Montana's Glacier Country. This may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

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

We want facilitation to be easy and enjoyable, so we have several hands-on ways for our visitors to plan their trips, including requesting a free travel guide—available in print and digital versions—and exploring our webpage, where we help them really discover what they want to do by making it easy to interact with communities, businesses and attractions directly. 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 experience locations seen in the content screened and explore new destinations.



Tourism Sales: The Tourism Sales Department at Western Montana's Glacier Country focuses on developing, promoting, managing and monitoring group travel and marketing programs. This includes domestic group tours, meetings and conventions, destination reunions and weddings, and international FIT (Foreign Independent Travel) sales.

Our approach to group travel is both collaborative and comprehensive. Success in this space requires building and nurturing strong business-to-business relationships with planners, tour operators and industry representatives—a process that takes time, with domestic partnerships often developing over 2–3 years and international ones over 3–5 years.

For years, we've maintained a strong presence at travel trade shows and meetings/convention events, fostering relationships with key buyers and generating valuable leads for our Glacier Country tourism partners. As interest in new destinations continues to grow, we remain committed to expanding these efforts and welcoming visitors from these important markets.

Our program is supported by a variety of strategic tools, including dedicated microsites for tour operators and meeting planners, a B2B blog, quarterly newsletters, educational resources for partners, paid advertising campaigns, earned media and hosted familiarization (FAM) 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 and 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 that feature our story or tourism experience as a result of hosting a media trip or pitching a story.





Bitterroot Valley. © 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 evaluate this plan by monitoring whether 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.

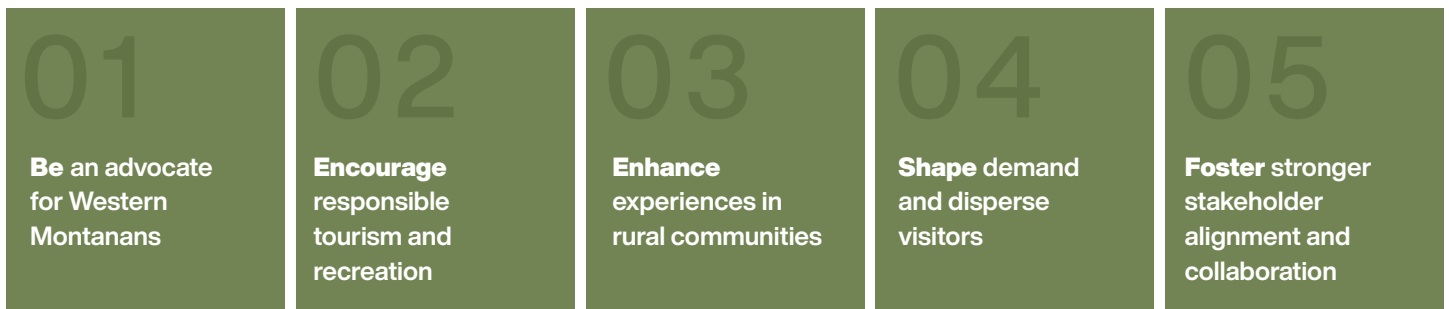
Destination Stewardship

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 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.

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 of benefiting 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 Western Montana's 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 is imperative to transparency and to engaging our communities.

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 also implement them when and if appropriate.

Destination Development

Combined with our existing cooperative grant program, VIC staffing grants, community event promotion program, 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. An outreach position will play a vital role in working directly with communities to identify their specific needs and support projects they are already pursuing, ensuring sustainable and impactful destination development.



 Missoula. © MEGAN JOHNSON

Brand Strategy

Western Montana's Glacier Country embraces a fresh, forward-looking identity through its recent rebrand, ensuring the brand remains current and reflective of both who we are now and who we aspire to be. This transformation positions us as leaders in destination stewardship, evolving into destination leadership. The rebrand highlights our deep connection to the region's natural grandeur, vibrant communities and adventurous spirit while reinforcing our commitment to preserving its allure for generations to come. Rooted in core brand pillars, we aim to enrich community, enhance connection, celebrate diversity and encourage inclusivity—all while championing stewardship and fostering partnerships that safeguard the essence of Western Montana.

Our brand emphasizes the value of community and connection, drawing on the unique character of our landscapes, people and cultures. We honor the traditional territories of Indigenous peoples, including the Amskapi Piikani, Ksanka, Seliš, and Qlispe', while celebrating the cultural richness they bring to the region today. At the same time, we inspire visitors and residents alike to embrace year-round adventure with a shared devotion to protecting Montana's delicate ecosystems. Through sustainable practices, education and collaboration, Glacier Country is dedicated to ensuring a welcoming and inclusive destination where stewardship and partnerships preserve the heart and soul of this extraordinary place.

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.

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.

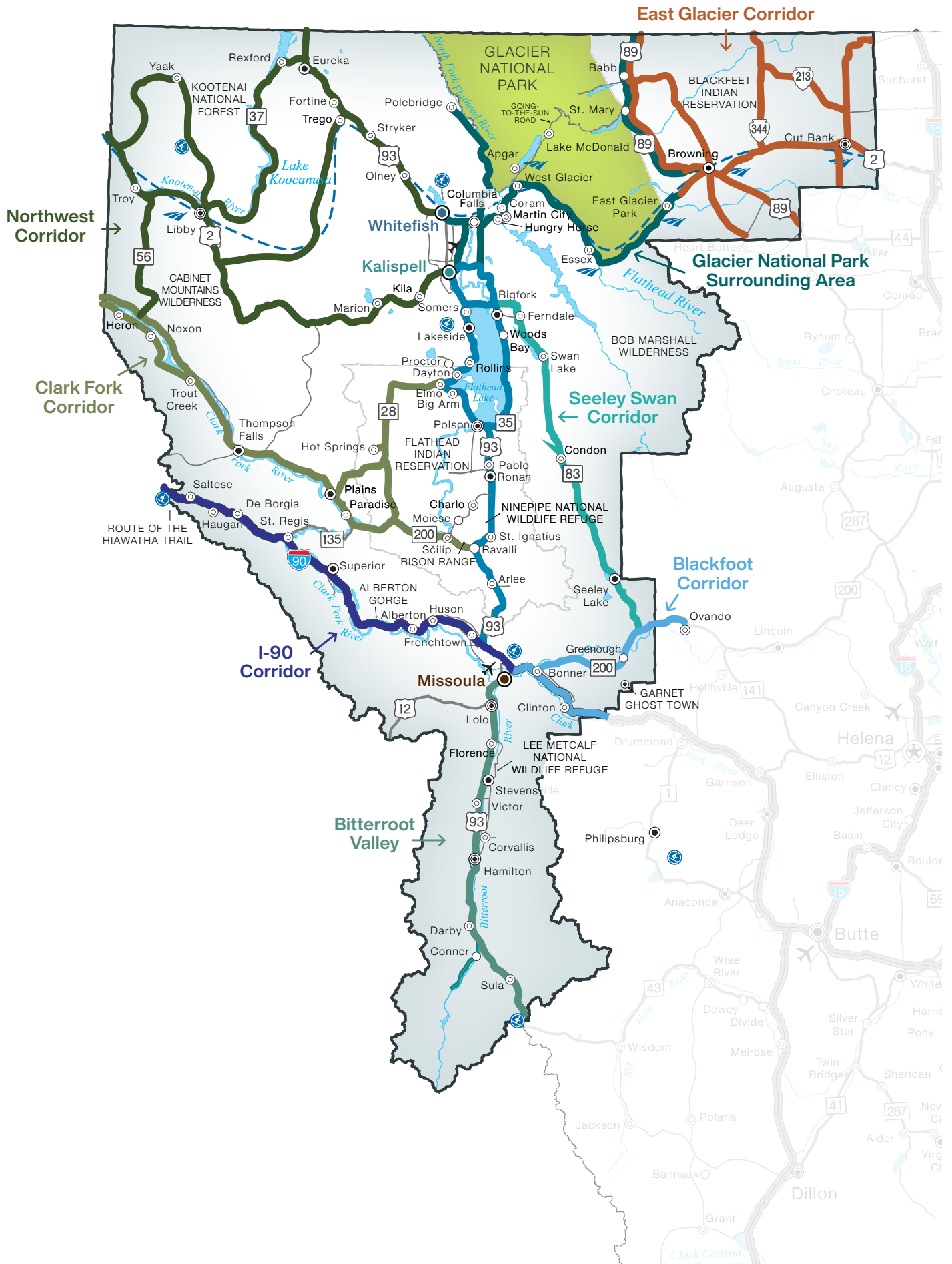
Bleisure travel refers to the blending of business and leisure activities during a single trip. This trend has been steadily growing as more professionals seek to maximize their travel experiences. Montana, renowned for its breathtaking natural landscapes and outdoor recreational opportunities, is poised 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



Route of the Hiawatha. © GLACIER COUNTRY



Two Medicine. © GLACIER COUNTRY



Destination

Glacier Country is a place of inspiring landscapes, welcoming small towns and deep cultural roots. Home to rich history, American Indian traditions and world-class outdoor recreation, this region offers more than just stunning scenery—it's a place where communities thrive, heritage is honored and visitors are welcomed with genuine hospitality.

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



Whitefish Mountain Resort. © BRIAN SCHOTT

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

- | | | |
|----------------------------|-------------------------|-----------------------------------|
| + 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 | |



St. Mary. © ANDY AUSTIN

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 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 we help 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 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, agricultural 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.



 Conrad Mansion. © ANDY AUSTIN

Potential Challenges

In 2024, we revisited our communities—holding eight meetings, one for each county—sharing the 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.



 Seeley Lake. © LYMAN GILLEN



Identified Challenges

Resident Sentiment Toward Tourism and Growth

Community warmth is a key part of our brand, but resident concerns about peak-season crowding persist. The growing presence of new residents—often mistaken for visitors—has complicated perceptions, creating tension that can affect the visitor experience.

Strained Community Capacity

During busy months, many communities experience stretched resources. Limited workforce and housing options reduce service consistency, making it harder for both locals and visitors to fully enjoy the area.

Unfamiliar Recreation Practices

Many first-time visitors and newer residents are still learning how to enjoy the outdoors responsibly. This increases the need for education around safety, etiquette and environmental care.

Persistent Housing Affordability Issues

Although population growth has stabilized, affordable housing remains limited. High costs and limited availability continue to affect workforce stability and quality of life across communities.

Workforce Shortages in Key Sectors

Restaurants, hotels and tourism-related businesses continue to face staffing challenges. Seasonal international worker programs face delays and limitations, reducing workforce availability during peak periods.

Vehicle Reservation System Awareness

Frequent changes to the Glacier National Park reservation system can lead to confusion. Travelers who arrive unprepared often have a diminished experience, highlighting the need for consistent communication.

Overcrowding During Non-Reservation Hours

Even when reservations aren't required, peak times before 7 a.m. and after 3 p.m. still see congestion. Turn-aways and access issues create frustration and strain natural resources.

International Travel Recovery Complexities

As global travel returns, international visitors face logistical challenges with park systems, especially around permit requirements. Language barriers, time zones and evolving systems can deter bookings.

Meetings and Conventions Recovery

The industry is bouncing back, with increased demand and longer booking windows. However, short-term requests and rising travel costs continue to limit some opportunities, especially for incentive travel.

Advancing Inclusion and Access

Creating a welcoming environment for travelers of all backgrounds and abilities is essential. Encouraging broader representation and opportunity across the industry supports long-term strength and relevance.

Weather Patterns and Environmental Change

Changing weather, wildland fires and shifting seasonal conditions affect everything from safety to scenery. These unpredictable events influence travel patterns and public perceptions of the region.

Ongoing Crisis Response Needs

Challenges like fire, snowfall variability and crowding require steady, proactive traveler communication. Continued outreach helps manage expectations and promote respectful, safe travel behaviors.



Economic Volatility and Visitor Spending

Uncertainty around costs and inflation continues to shape travel decisions. As a premium destination, Montana may feel these shifts more acutely, especially among price-sensitive travelers.

Evolving Visitor Values

Today's high-value visitor is defined not just by spending, but by shared values like respect, curiosity and care. Encouraging mindful travel helps support community and conservation goals.

Public Lands Infrastructure Limitations

Aging infrastructure, delayed openings and limited funding impact visitor access and experience. Improvements are underway, but construction disruptions and maintenance gaps remain concerns.

Uncertainty in Global Travel

Global events continue to influence traveler confidence. Concerns about safety and shifting economic conditions affect international visitation to Glacier Country.

Expanding Market Competition

With more options for travel, it's essential to promote Glacier Country's unique offerings. Competing for responsible, values-aligned visitors helps ensure long-term sustainability.

Limited Transit and EV Charging Access

Transportation gaps between communities and a perceived lack of electric vehicle charging stations create accessibility barriers, particularly in rural areas.

Impacts of Short-Term Rentals

Short-term vacation rentals help meet visitor demand but can reduce housing availability for residents, especially in communities with limited long-term rental options.

Changing Digital Landscape

Privacy rules, social media algorithm shifts and new engagement trends challenge how we connect with audiences. Strategic, adaptable marketing is key.

Unpredictable Federal Operations

Changes to federal funding or land management can disrupt services and access to public lands. Proactive communication helps mitigate visitor confusion and support local planning.

Closures of Public and Tribal Lands

Temporary closures—whether due to weather, safety, or administrative needs—impact both residents and visitors. Reliable updates and planning help reduce disruptions.

Funding for Sustainable Tourism

Destination organizations are increasingly responsible for stewardship, not just marketing. Sustaining funding for these broader roles is critical to balancing community and visitor needs.

Perceptions of Glacier Park's Seasonality

Many travelers believe Glacier National Park is only open in summer. Promoting year-round opportunities helps spread visitation, ease pressure and support regional businesses.

Public Understanding of Destination Organizations

While awareness has grown, it's still important to communicate our role in supporting communities, enhancing visitor experiences and leading sustainable tourism strategies.



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 opportunities 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 age 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; girls' getaways are on the rise in the group market, based on women making up 85% of solo travelers.

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:** People who are respectful and kind to our residents and good stewards of our destination
- + **Unforgettable 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





Supporting Research

Our FY 2026 Destination Organization Plan is built on a robust, diversified strategy designed to stay responsive and resilient amid economic, environmental and geopolitical shifts. Each tactic is informed by current, credible research from national, international and regional sources, reflecting changes in travel behavior, sentiment and market dynamics.

This approach allows Western Montana's Glacier Country to support visitors and residents, prioritize stewardship and strengthen regional economies—regardless of external conditions. Strategies such as value-driven messaging, market segmentation, responsible recreation and year-round engagement position the region to lead with resilience and care in FY 2026 and beyond.

While previous-year data is used for benchmarking, our analysis centers on the most recent and relevant insights. These findings highlight economic instability, declining international visitation, shifting domestic demand and a rising emphasis on sustainable travel. This research foundation ensures our plan remains relevant, data-driven and equipped to manage evolving trends while protecting local communities and ecosystems.





A Focus on Domestic Leisure Travel as a Stabilizer

With international visitation in decline and global uncertainty increasing, domestic leisure travel remains a core pillar of the U.S. travel economy—and a critical tactic in maintaining regional economic health. The Spring 2025 Travel Forecast from the U.S. Travel Association and Tourism Economics projects 3.9% growth in domestic leisure travel in 2025, with total spending exceeding \$1 trillion, matching pre-pandemic levels when adjusted for inflation.

Source: U.S. Travel Association and Tourism Economics, April 2025 ustravel.org – Spring 2025 Forecast

Targeting Multigenerational and Family Travel

Family and multigenerational travelers seek meaningful, restorative, nature-based experiences—aligning with Glacier Country's product. These groups also travel during school breaks and off-peak seasons, which supports year-round dispersal. The National Tour Association reports that 55% of members serve the family travel market and 45% of all leisure travelers include children in their travel planning.

Source: National Tour Association (NTA), April 2025 ntaonline.com – Family Market Guide

Continued Recovery of Group and Motorcoach Travel

Group travel, including motorcoach tours, provides predictable visitation and spending across multiple sectors—especially in smaller or rural communities with lower individual traveler volume. The American Bus Association Foundation reports a 20% year-over-year increase in new motorcoach orders in early 2025, signaling a continued rebound in this sector.

Source: American Bus Association Foundation, February 2025 news.buses.org – ABA Q4 2024 Report

Building for Pricing Transparency in a High-Cost Climate

Transparent pricing, flexible itineraries and the ability to plan with certainty are more valuable than ever for price-sensitive travelers. This reinforces the need for visitor tools, consistent messaging and destination support systems. According to the U.S. Travel Association's Travel Price Index (March 2025), prices for recreation and food away from home have risen 0.6% and 0.4%, respectively—outpacing general inflation. Affordability remains a top decision-making factor.

Source: U.S. Travel Association, March 2025 ustravel.org – Travel Price Index

Elevating Wellness and Experience-Based Travel

Travelers continue to prioritize experiences that support emotional well-being, cultural enrichment and personal connection. Glacier Country's natural assets and storytelling align with this growing trend. Condé Nast Traveler reports a shift in wellness travel toward "longevity, community and connection," with demand rising for immersive retreats and nature-based getaways.

Source: Condé Nast Traveler, January 2025 cntraveler.com – 2025 Wellness Trends





Ensuring Diversification of Strategy

In an increasingly unpredictable landscape—where economic and international policy changes rapidly impact traveler flow—reliance on a single audience segment or tactic is risky. Diversifying audiences, platforms, seasons and channels enhances regional resilience. Our FY 2026 plan integrates insights from: International downturns (e.g., 70%+ decline in Canadian flight bookings – Axios, April 2025); regional visitor-to-resident ratio data (Zartico); public land access fluctuations; workforce and housing capacity; and community-identified visitor values. This strategic diversification allows us to meet the moment and build long-term value for our communities.

Source: Axios Media, U.S. Travel Association, Glacier Country Internal Messaging Strategy – March/April 2025

The Value of Destination Stewardship

This report defines the strategic opportunity for destination organizations to evolve into leaders of community-based tourism through destination stewardship. It emphasizes building coalitions to balance tourism with economic development, digital evolution and community well-being. In 2025, this framework remains foundational as destinations respond to unpredictable external forces with thoughtful long-term planning.

Source: DestinationNEXT Futures Study, Destinations International, originally published 2023; reaffirmed April 2025 through industry-wide briefings

Revised Outlook for International Inbound Travel to the United States

The originally forecasted 9% growth in international inbound travel for 2025 has been revised to a 9.4% decline, with an anticipated \$9 billion loss in foreign visitor spending. This shift is driven by travel deterrents including inflation, visa processing delays, exchange rate fluctuations and political uncertainty.

Source: Spring 2025 Travel Forecast, U.S. Travel Association and Tourism Economics, published April 2025

Canadian Travel Sentiment and Decline in U.S. Visits

Advance airline bookings from Canada to the U.S. for the April–September 2025 travel season are down over 70% year-over-year. The steep decline is attributed to travel advisories, economic anxiety and deteriorating policy relations. The U.S. Travel Association projects a 20.2% drop in Canadian visitation, with potential downstream impacts on border state economies.

Source: Axios Deep Dive: Canadian Travel to the U.S., Axios Media, published April 8, 2025



Polson. © CHRISTIAN SAWICKI

Outbound Travel Sentiment in Europe and Asia

Chinese outbound tourism is not expected to return to pre-pandemic levels until 2026 or later, hindered by weak consumer confidence, inflation and limited flight capacity. Similarly, forward bookings from European travelers to the U.S. have dropped 25% since February 2025, as noted by major hotel and airline groups.

Source: U.S. Travel Sector Faces Long Wait for China Tourism, Reuters, published April 22, 2025

U.S. Inbound Travel Forecast to 2026

According to NTTO, international arrivals to the U.S. are now projected to reach 77.1 million in 2025 (down from 80+ million projected in 2024) and 85 million by 2026, assuming improvement in global economic conditions. However, this recovery remains uneven and subject to volatility.

Source: International Travel Forecast, National Travel and Tourism Office (NTTO), U.S. Department of Commerce, updated March 2025

Domestic Travel and Spending Outlook

Domestic leisure travel remains resilient, with projected growth of 3.9% in 2025, totaling more than \$1 trillion in spending—matching pre-pandemic levels when adjusted for inflation. However, business travel remains below 2019 levels and recovery is not expected until after 2028.

Source: Spring 2025 Travel Forecast, U.S. Travel Association and Tourism Economics, published April 2025

Tour Operator and Group Travel Trends

While late 2024 projections suggested 66% of tour suppliers and DMOs anticipated increased visitation, the April 2025 update reveals cautious optimism, with many operators citing rising input costs, limited labor supply and shifting international demand as limiting factors.

Source: Updated Operator Sentiment Survey, National Tour Association (NTA), collected and published April 2025







Motorcoach Demand Signals Resilience in Group Travel

The ABA reports a 20% year-over-year increase in new motorcoach orders and steady recovery of group travel bookings for regional markets, including state and national parks. This suggests a strong opportunity for destinations like Glacier Country that offer scenic, road-accessible experiences with minimal air travel reliance.

Source: Motorcoach Industry Trends Report, American Bus Association Foundation, published February 2025

Strategic Messaging and Community Readiness

This internal strategy outlines our region's ability to respond in real time to economic, policy and environmental changes that impact tourism. Messaging strategies include promoting responsible recreation, dispersing visitation, protecting public lands, supporting local economies and pivoting based on current international and domestic demand indicators.

Source: 2025 Crisis Communication and Messaging Strategy (Internal), Western Montana's Glacier Country, finalized March 4, 2025



Mariah Gladstone with Indigikitchen in Babb. © ANDY AUSTIN



Flathead River. © GRETCHEN KNUFFKE

Overall Goals and Objectives

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

- 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 2026 is \$4.2 million, strategically allocated across several key areas to support marketing, community engagement, visitor services, and sustainability efforts. Here's a breakdown of our spending:

Category	Amount Budgeted	% Budgeted
Administration	\$750,000	18%
Joint Ventures	\$115,000	3%
Opportunity Marketing	\$50,000	1%
Cooperative Marketing	\$30,000	1%
Marketing Personnel	\$360,000	8%
Agency Services	\$600,000	14%
Marketing Resources	\$70,000	2%
Paid Media	\$1,160,000	28%
Earned Media/Tourism Sales	\$145,000	3%
Website Development/Marketing (SEO/SEM)	\$150,000	3%
Education/Outreach	\$130,000	3%
Travel/Trade Shows	\$80,000	2%
Research	\$160,000	4%
Product Development	\$120,000	3%
Visitor Services	\$280,000	7%
TOTAL BUDGET	\$4,200,000	100%

Projected Visitation

For FY 2026, we project approximately **12.5 million nonresident visitors**. While visitor numbers are expected to remain steady, our strategy focuses on dispersing visitors more evenly throughout the year and across lesser-known areas to reduce the pressure on popular destinations such as Glacier National Park.

Conclusion

Glacier Country's FY 2026 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