

2024 - 2034

# DESTINATION STEWARDSHIP PLAN FOR MISSOULA



DESTINATION  
**Missoula**  
MONTANA



**Missoula**  
TOURISM BUSINESS IMPROVEMENT DISTRICT





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# Executive SUMMARY

The Missoula Destination Stewardship Plan is a 10-year strategic roadmap that includes a vision for the future of Missoula as a destination – as well as goals and strategic initiatives to help achieve that vision by 2034. It is an ongoing and living document that will be used to guide work that achieves the vision for Missoula that has been established by the stakeholders and residents in the community.

Led by Destination Missoula and the Missoula Tourism Business Improvement District (TBID), and co-funded by the University of Montana, Missoula Montana Airport, Downtown Missoula Partnership: Business Improvement District, and Missoula County, this plan was created to bring together the community of Missoula and the surrounding five valleys to create a strategic path forward for the future of tourism in the region. This work is the outcome of a community-driven process guided by a Steering Committee of local leaders representing a variety of sectors and interests.

Destination planning is about taking a strategic, rather than organic, approach to tourism by establishing a shared vision and intentional path forward for the stewardship of Missoula as a destination. To create this roadmap for Missoula, extensive engagement, research, and analysis was conducted by leading experts in the tourism industry from March through October 2023. Input from the local tourism industry, community leaders, elected officials, residents, visitors, and clients informed the development of all of the strategic goals and initiatives. In total, impassioned feedback was collected from more than 1,100+ stakeholders. The plan also considers key insights in other local planning initiatives that are underway or were recently completed.

## FIVE STRATEGIC GOALS

This plan supports long-term, community-wide efforts to create economic and environmental resiliency in Missoula and the surrounding five valleys for continued prosperity and success of the region through the following strategic goals:

- #1 Elevate and Enhance Stewardship
- #2 Support Placemaking Enhancements
- #3 Improve Transportation and Connectivity
- #4 Strengthen Community Alignment
- #5 Advance Destination Development

# Destination Stewardship Plan

## CONTRIBUTORS

Destination Missoula and the TBID would like to thank the regional community leaders who contributed their time and expertise as participants of the Steering Committee, providing guidance, input, and support during the development of the Destination Stewardship Plan.

### STEERING COMMITTEE MEMBERS:

**Big Sky Film Institute**

Rachel Gregg

**Blackfoot River Outfitters**

Terri Raugland

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**Five Valleys Land Trust**

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## FINANCIAL PARTNERS

**Downtown Missoula Partnership: Business Improvement District**

**Missoula County**

**Missoula Montana Airport**

**University of Montana**

## PROJECT TEAM

We would like to thank the dedicated project team members who worked diligently to move this project forward, from concept to completion. We want to acknowledge the partnership with MMGY NextFactor, the lead consulting agency on the project, and collaborating agencies, Better Destinations, for their expertise in sustainable tourism and destination stewardship practices, and SMARInsights. This team brought tourism industry expertise and depth of knowledge that was critical to guiding this Destination Stewardship Plan process.

This plan is, by design, a living document that will continue to deliver exceptional value to the community as we journey through the implementation phase and forge new partnerships along the way.

## DESTINATION MISSOULA STAFF

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Executive Director

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Founder and CEO

## SMARINSIGHTS

**Denise Miller**  
Executive Vice President



*Letter from*

# DESTINATION MISSOULA/TBID

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As an organization, our mission is to promote responsible and sustainable tourism in Missoula and the surrounding five valleys. We are committed to helping build and support a welcoming and equitable culture for all residents and visitors in ways that thoughtfully advance our quality of life, enhance the quality of local experiences, and protect the breathtaking natural environment that surrounds us.

Destination Missoula undertook this long-term tourism planning process with a sense of excitement and responsibility for the future of this place we call home. From the beginning of the Destination Stewardship Plan development process, we knew that it was critical for this work to focus on stewardship, because for us, responsible stewardship is foundational to ensuring the health and prosperity of Missoula and the surrounding five valleys. It was our intention to determine an appropriate path forward for tourism that considers the needs of residents throughout the region. The resulting plan is reflective of the extensive, thoughtful input expressed by residents, as well as our commitment to both bolster the visitor economy and serve as responsible stewards of Missoula.

As Missoula continues to evolve and we consider our future as a destination, there's never been a more important time to engage our communities, residents, partners, and local officials to collectively imagine the long-term vision for local tourism. Visitation has changed since COVID-19, with hotel occupancy levels that have yet to recover from pre-pandemic levels as well as visitors who are new to rural travel and outdoor recreation. Visitation and residential growth in the region brings a new set of challenges and opportunities for our community, and as such, it is incumbent upon us as a collective community to examine our position and develop an intentional strategy for tourism. This plan articulates elements of this strategy as strategic goals and initiatives to be pursued with help from the entire community.

While we have championed the evolution of this long-term Destination Stewardship Plan and development of the strategies within, it is important to recognize that this is not Destination Missoula's Plan – it's a plan for our entire community. This is about the future of our region as a whole. This work represents a 10-year roadmap for Missoula and the strategic goals within reflect priorities of the community and recommendations that encompass our collective community.

Our path forward to pursue this work will require support from organizations, businesses, and leaders across the region. This plan was developed with significant input and consideration from Missoulians, and putting these strategies into action will require the same level of support and action from us all.

We are so grateful to everyone who contributed their valuable time to share input and envision an ideal path forward for Missoula. We look forward to a very collaborative effort to bring this Destination Stewardship Plan to fruition.

Sincerely,



**Barbara Neilan**

Executive Director, Destination Missoula/TBID



# IMAGINE IT'S THE YEAR 2034

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In 2034, Missoula celebrates a decade of remarkable progress in its journey towards becoming a leading destination known for responsible stewardship, cultural vibrancy, connectivity, and community alignment. The Missoula Destination Stewardship Plan, launched in 2024, has been a driving force behind the city's transformation, fostering a balance between economic growth, environmental preservation, quality of life, and inclusivity.

The community's commitment to stewardship has been a key factor in Missoula's evolution. Through collaborative efforts and an intentional destination management strategy, initiatives focusing on user education, staff training, infrastructure enhancements, and community engagement have ingrained responsible tourism practices into the local way of life. By redirecting visitors to designated areas to minimize environmental impact, this helped to preserve natural beauty and fostered a sense of responsibility among residents and visitors alike.

Collaboration with Tribal nations has played a pivotal role in Missoula's overall success, incorporating Indigenous culture, heritage, and languages into a shared stewardship strategy. Educational initiatives led by Destination Missoula have cultivated a commitment to stewardship among residents, businesses, and leaders, recognizing tourism's intrinsic value to the region's success.

Over the past decade, improvements in design and placemaking that emphasize accessibility and celebrate local arts and culture have enhanced the area's appeal for visitors and residents alike. Missoula has become renowned for its visitor-friendly approach to accessibility and its creative economy is flourishing, telling local stories through various mediums that help weave history and heritage into community life.

Connectivity and accessibility have significantly improved in recent years, with expanded transit services, electric vehicle charging stations, improved bikeways, and enhanced air travel options. Missoula's regional and global connectivity has been strengthened by the restoration of Amtrak passenger rail service and expanded broadband internet access.

As Missoula has grown as a visitor destination, it has also continued to evolve as a welcoming community that prioritizes safety, community education, and improved accessibility for all. Inclusivity initiatives ensure that visitors and residents of all abilities feel valued.

The city's holistic approach to destination development has been a driving force, with advocacy for a multi-use center, awareness campaigns for out-of-state travelers, curated experience packages, and resident-friendly accommodation rates. Outdoor recreation development, including trail and river mapping and the expansion of resources like Marshall Mountain, has solidified Missoula's reputation as a world-class destination.

This progress is a testament to the transformative power of strategic tourism development and collective community effort initiated in 2024 by the Missoula Destination Stewardship Plan. Missoula stands as a model for successful destination planning and collaboration, and a shining example of the positive impact of a united, caring community.

## *What Stewardship Means to Us*

# DEFINING STEWARDSHIP IN MISSOULA

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Every community defines stewardship differently, based on what is most important to the people who live there. Because Destination Missoula sought to create a Destination Stewardship Plan, it was important to determine early on what stewardship means for Missoulians. As one way of arriving at this understanding, those who attended Town Hall meetings in late May were asked this question: “What does destination stewardship mean to you?”

The thoughtful responses shared in those meetings and others yielded ample evidence that the idea of stewarding Missoula tourism resonates strongly with residents. The positive tone of those responses also underscored that Destination Missoula was on the right path in centering its 10-year plan on stewardship.

Many embraced a broad definition of destination stewardship that encompasses far more than protections for the local environment. In a city surrounded by the 2 million acre Lolo National Forest and at the confluence of three rivers, protecting natural lands and water is essential.

For many locals, stewardship revolves around safeguarding what makes Missoula special and what the community values and needs. Several mentioned the importance of honoring different perspectives and taking care of Missoula residents. The idea of stewardship extended to welcoming others and honoring cultures that existed long before Missoula was founded. Several described stewardship as a long-term, coordinated endeavor aimed at being thoughtful about the impacts of tourism and developing the appropriate infrastructure and strategies to manage it well.

Most of all, many see stewardship as a shared responsibility between those who live and work in Missoula and those who are passing through. Establishing this commitment is seen as a key to finding the right balance between building a vibrant visitor economy and taking care of community needs and priorities.

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“If Destination Missoula can create in its visitor that same sense of commitment to building a better place for the next visitor or the next generation, that’s a home run.

- Local Community Leader







# DESTINATION STEWARDSHIP PLAN DEVELOPMENT PROCESS

The project team reviewed existing city, county, and regional plans, policies, and regulations for reference and direction throughout the development of Missoula's Destination Stewardship Plan. The project team recognizes and respects the work that has already been completed in this region and considers it a solid foundation to build upon.

**The following is a list of specific documents and sources that were referenced for the research and assessment phase of this project:**

- Missoula County Averaged Nonresident Travel Spending, 2022
- City of Missoula Housing and Houselessness Initiatives and Investments, 2021
- City of Missoula ZERO by FIFTY Zero Waste Plan, 2018
- Citywide Parking Plan
- Destination Missoula Annual Report, 2022-2023
- Developing a Vision for Marshall Mountain Park, 2021
- Downtown Alley Inventory and Activation Plan, 2020-2021
- Downtown Heritage Interpretive Plan, 2020
- Engage Missoula website
- Envision West Broadway Community Master Plan, 2021
- Glacier Country Destination Stewardship Plan
- Marshall Mountain Park Conceptual Master Plan, 2023
- Missoula's Downtown Master Plan, 2019
- Missoula Just, Equitable, Diverse, and Inclusive (JEDI) Resolution, 2021
- Missoula Midtown Association - Midtown Master Plan White Paper, 2021
- Missoula Urban Area Open Space Plan, 2019
- North Riverside Parks and Trails Design Plan Report, 2020
- Our Missoula Code Reform
- Parks, Recreation, Open Space, and Trails (PROST) Project Overview, 2018
- The Montana Travel Industry Summary, 2022

# Project OBJECTIVES

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From the onset of this Destination Stewardship Plan process, the objectives of this project were to:

-  Create a 10-year Destination Stewardship Plan for Missoula.
-  Provide a framework for sustainable tourism development and promotion that balances residents' quality of life with quality visitor experiences.
-  Identify Missoula visitors who appreciate and help to preserve what makes this place special.
-  Create strategies for responsible growth and management of visitation.
-  Develop a shared vision to reimagine the future of tourism and recreation in Missoula and the surrounding five valleys.
-  Assess potential strain that visitation may create on the region's natural resources, economy, amenity infrastructure, and quality of life.
-  Create alignment with existing strategies and plans or those in development.

## GUIDING PRINCIPLES

Throughout its development, the work of this Destination Stewardship Plan was guided by a set of community-led, mutually identified principles that are important to the future of tourism in Missoula and served as a guidepost during the process of charting a responsible path forward.



### STEWARDSHIP AND SUSTAINABILITY

Respecting and protecting Missoula's environment and enhancing sense of place.



### INCLUSIVITY AND WELCOMING

Acting with respect and intention to care for all people in the Missoula community.



### HIGH QUALITY OF LIFE

Increasing the quality of life, quality of place, and quality of experiences for both residents and visitors.





# STAKEHOLDER ENGAGEMENT

The project team conducted an extensive stakeholder engagement process between May and October 2023, including a combination of in-person and virtual sessions. Over 200 stakeholders and residents of Missoula shared input and insight through a series of focus groups, community town halls, in-depth interviews, and steering committee meetings. The purpose of these conversations was to develop situational awareness of Missoula’s visitor economy, as well as to identify key opportunities and challenges for the future of this area as a visitor destination and a high quality place for residents to live, work, and play.

## Engagement Highlights



1,243

Missoula stakeholders and community members provided input in this planning process.

- Steering committee sessions with 29 participants
- 9 focus groups with 92 participants
- 16 one-on-one interviews
- 4 community town halls with 75 participants
- Resident survey with 953 respondents
- DestinationNEXT assessment with 78 respondents

## STEERING COMMITTEE

A Steering committee of 29 community leaders from across industries and sectors in Missoula was created to guide the process, advise on key considerations, and champion the Destination Stewardship Plan through development into implementation. The Steering Committee met for three working sessions throughout the process, with some members also participating in additional interviews, focus groups, town halls, surveys, and assessments.

## INTERVIEWS

The project team conducted 16 in-depth, one-on-one interviews with community leaders who provided specific expertise and insights into different components of the local economy, community priorities, and lifestyle. These conversations helped to provide a deeper understanding of Missoula's current and recent visitor economy, identify specific opportunities and challenges surrounding tourism, and highlight existing efforts and upcoming priorities related to the visitor economy.

## COMMUNITY TOWN HALLS

The project team facilitated four community town halls in May and September of 2023. These community town halls were hosted in Missoula and were attended by 75 residents, combined. These sessions were intended to offer residents further opportunity to share their vision for the future of tourism in Missoula and focused on solution-oriented exercises and discussions.

## FOCUS GROUPS

9 sector-specific focus groups were held with 92 stakeholder participants representing the following sectors:

- Outdoor Recreation
- Arts, Culture, History, and Heritage
- Economic Development, Government, Transportation, and Sustainability
- Retail, Food, and Beverage
- Accommodations
- Front Country Recreational Collaborative/Land Managers
- Attractions, Festivals, and Events
- Confederated Salish and Kootenai Tribes
- Diversity, Equity, Inclusion, and Accessibility

**After completion of the in-depth interviews, focus groups, and community town halls, the following key opportunities and challenges emerged for Missoula:**

## OPPORTUNITIES

- Visitor and Resident Education
- Destination Management
- Indoor Facilities and Venues
- Placemaking
- Year-Round Experiences
- Destination Access and Mobility

## CHALLENGES

- Community Alignment
- Transportation
- Workforce
- Housing



# RESIDENT SURVEY

In collaboration with Destination Missoula/TBID, the project team developed an online survey for residents to help identify local sentiment regarding tourism in Missoula.

The survey was fielded in both spring and fall 2023 to gauge any shifts in sentiment toward tourism before and after Missoula's peak visitor season in the summer.

 **953**

## RESIDENTS RESPONDED

647 in Spring (May 8 - June 26)

306 in Fall (August 7 - October 2)



**98%**

Most respondents live year-round in Missoula.



**48%**

Nearly half of respondents are long-term residents who have lived in Missoula for more than 20 years.



## The most desirable visitors:

**Are respectful of local lifestyle**

**Are respectful of natural & cultural resources**

**Attend meetings & conventions**

**Come at less busy times**

**Attend sports tournaments & activities**

**Go to less visited locations**

**Are high spenders**



**4** out of **5** respondents

- Are likely to recommend Missoula as a place to visit when talking to friends and family members.
- Indicated that tourism is an important component of the Missoula economy.
- Agree that Missoula is a safe community for residents and visitors.

## Top 5 Industries Supporting Missoula's Economy:



OUTDOOR RECREATION



EDUCATION



HEALTHCARE



CONSERVATION



ARTS & CULTURE

## THE FOLLOWING KEY FINDINGS EMERGED AS A RESULT OF THE RESIDENT SURVEY:



The majority of respondents feel that the positive benefits of tourism outweigh the negative impacts and agree that tourism is an important part of Missoula's economy.



Residents believe that the most important considerations regarding tourism in Missoula are fair wages, waste management, environmental preservation, affordable housing, and respectful visitor behaviors.



Residents strongly agree that Destination Missoula is a resource for locals as well as visitors.

# DestinationNEXT ASSESSMENT

## DESTINATION ALIGNMENT VARIABLES



**Business Support**



**Community Group & Resident Support**



**Government Support**



**Organization Governance**



**Workforce Development**



**Hospitality Culture**



**Equity, Diversity & Inclusion**



**Funding Support & Certainty**



**Regional Cooperation**



**Sustainability & Resilience**



**Emergency Preparedness**



**Economic Development**

## DESTINATION STRENGTH VARIABLES



**Attractions & Experiences**



**Art, Culture & Heritage**



**Dining, Shopping & Entertainment**



**Outdoor Recreation**



**Conventions & Meetings**



**Events & Festivals**



**Sporting Events**



**Accommodation**



**Local Mobility & Access**



**Destination Access**



**Communication Infrastructure**



**Health & Safety**

MMGY NextFactor conducted a detailed assessment of the Missoula visitor economy utilizing a comprehensive stakeholder survey that measures destination strength and destination alignment based on a series of 24 variables. The results were then used to plot Missoula into a Scenario Model, which shows the specific opportunities that Missoula may build upon.

78 stakeholders responded to the online assessment.

Respondents included representatives of the tourism industry partners (37.2%), the Destination Missoula/TBID Board of Directors (20.5%), community leaders (15.4%), government leaders (6.4%), and others.

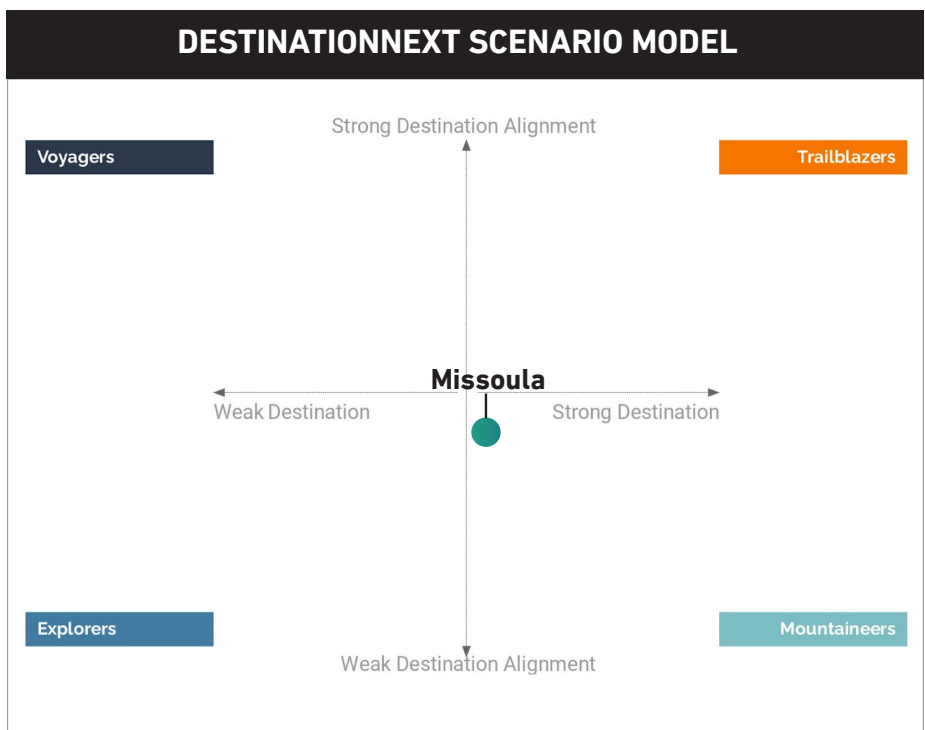


# DestinationNEXT ASSESSMENT RESULTS

**From a destination strength perspective,** stakeholders perceive Missoula to be strong in all facets of outdoor recreation experiences, including hiking and biking trails, having authentic and unique attractions, and in delivering high-quality arts and cultural attractions that the destination promotes and preserves in meaningful ways. However, stakeholders also perceive that Missoula has homelessness and short-term rental issues to contend with and needs more focus on air access, year-round attractions and experiences, traffic abatement strategies, increased public transportation, and competitive venues for hosting conventions and sporting events.

**From a destination alignment perspective,** stakeholders perceive the Missoula community to be strong in economic development, regional cooperation, and organization governance. However, stakeholders also perceive Missoula to be lacking in workforce development (adequate affordable housing, daycare, and healthcare options), community group and resident support (positive perceptions of the tourism industry), and emergency preparedness (emergency funding).

Overall, Missoula landed in the **Mountaineer** quadrant of the DestinationNEXT scenario model, falling slightly below the benchmark in community alignment but above the benchmark for destination strength. Results indicate improvements are needed most urgently in workforce development, increasing air access, and advocating for improving homelessness (which impacts visitors, residents, and businesses). Additional advances are also needed in communication infrastructure (increasing broadband and cellular phone service), and alignment around short-term rentals. Community conversations about how to support moving toward a year-round visitor economy by boosting shoulder and off-season visitation are also needed.



This Destination Stewardship Plan will support the development of all of these aspects to strengthen the destination assets and community alignment throughout the region.



## OVERARCHING KEY FINDINGS

Following extensive research, resident and stakeholder engagement, and analysis of the Missoula visitor economy and its potential, 11 overarching key findings have emerged.

Missoula is a community with deeply held convictions about the value of sharing care and respect for others and for its natural surroundings. In-depth conversations with hundreds of Missoulians over the past year, along with the outcomes of independent research studies conducted for this planning process, point to a clear set of findings that have collectively shaped this plan. Research included a Missoula visitor profile study conducted by the full-service, market research firm, SMARInsights (findings from this study can be found in the appendix on page 37).

### **1. While residents rank several local industries as more important than tourism, it's clear many believe that tourism puts Missoula on the map.**

Destination Missoula's work to build the community's image not only drives visitation, but is seen as a key to recruiting local talent, whether for university enrollment or attraction of business startups and workforce. Visitor dollars drive the profitability of many valued businesses, including locally owned restaurants, shops, and arts and culture venues. Kettlehouse Amphitheater, a beloved outdoor concert venue, draws half of its annual ticket sales from patrons outside of Missoula. Many believe that increasing awareness of the value that tourism brings to Missoula residents could help defuse growing perceptions of resentment against visitors.

### **2. Many locals do not feel that Missoula needs tourism promotion.**

For many, Missoula's tourism strategy is less about getting visitors to show up and more about managing what they do once they arrive. Some say Missoula doesn't need more tourism, but it can benefit from a tourism economy that is intentionally structured, attracts responsible visitors, and has a more balanced impact at locations throughout the region and year-round. They advocate for a positive message that welcomes people and invites them to join in keeping Missoula the special place it is. "If we stop being nice to people from out of town," says one resident, "then we stop being who we are."

**3. Many community leaders share deep frustration with a state bed tax structure that limits Missoula's ability to secure more direct economic benefits from millions of visitors.**

- The majority of the funds generated through the state's bed tax go to support the Montana General Fund, state level tourism promotion, the Montana Heritage Center, tourism research, historic preservation grants, and other various state agencies.
- Destination Missoula only receives 11% of the total bed tax funds generated through Missoula lodging properties.

There is a growing interest in identifying ways visitors can share more of the cost of funding investments into community assets, such as Marshall Mountain. Others see opportunities for creating partnerships between businesses and conservation groups to fund outdoor infrastructure.

**4. While the newly rebuilt Missoula Montana Airport offers nonstop flights to 14 markets, airports closest to the national parks are seeing the largest growth.**

Set to double in size by 2025, the Missoula airport soon will have more capacity to drive local economic growth and serve residents better. Due to the expense of incentivizing and adding new routes, airport leadership has limited ability to entice new carriers to test the Missoula market.

**5. The Front Country Recreational Collaborative supports concentrating visitors in high-use areas near Missoula, rather than dispersing them to more pristine places.**

Many say this approach actually fits the preferences of most tourists. Embedding what typically happens into a consistent strategy would concentrate user impacts in a tighter geography that could be more intensively managed. Tactics could include providing shuttles or bikeways to reduce road traffic, improving busy trails and river access points, and increasing trash pickups, enforcement, and visitor education. This innovative approach also can be seen as a nod to residents' interest in preserving less-visited places for local use.

**6. Finding ways to connect visitors with Missoula's makers and manufacturers could yield wins for both economic development and tourism.**

Offering local companies opportunities to welcome visitors through unique experiences can help connect travelers with local artists and makers and better support creatives in Missoula. By engaging in these experiential tourism opportunities, visitors can immerse themselves firsthand in Missoula's culture, creating intimate and memorable experiences.

**7. Missoula has many opportunities to build on the success of its sports tourism initiative.**

Missoula has proven its worth as a venue for major outdoor sports championships, and fields at Fort Missoula regional park attract many thousands for soccer, softball and lacrosse tournaments. Strategic investment into sports venues and amenities are recommended to increase and enhance sporting events and offerings. These investments can not only create more amenities for locals, but position Missoula to attract more of the visitors whose interests mirror what the community values.

**8. Missoula's arts and culture scene is a major local amenity that holds strong appeal for visitors, especially responsible travelers.**

The vibrancy of the city's live music offerings, museums, and maker community also is a ready-made way for Missoula to differentiate itself from competitors. However, there is currently a need for organizing and maximizing this important asset or to optimize development of Missoula's creative economy and support creators.



**9. Missoula’s long-time commitment to welcoming different perspectives not only sets it apart, but is a quality that holds strong appeal for responsible travelers.**

Economic developers say the community’s openness to accepting others also is important to attracting young talent and creative spirits. With a brand-new airport built for accessibility, Missoula also can find opportunity in establishing itself as a city that is equipped to welcome people of all abilities. TravelAbility estimates that by 2025 as many as 25% of Americans either will be traveling with disabilities or with someone who has a disability.

**10. To ensure the future success of its tourism economy, Missoula must begin building resilience against climate impacts.**

The threat of hotter, drier, smokier summers and warmer, wetter winters carry profound impacts for a visitor economy dependent on outdoor experiences. Even though shoulder seasons have grown longer, much local recreation infrastructure and staffing is still geared to end on Labor Day. To support local businesses and quality of life, it will be important to consider investing in amenities attracting shoulder-season visitors. It also will be vital to develop new indoor spaces to house events year-round.

**11. The Confederated Salish and Kootenai Tribes have many ideas for generating tourism and are open to building a relationship of trust with Destination Missoula.**

The tribes have designated portions of their lands, including the Bison Range, for visitation and have a keen interest in managing access, preventing overuse, and developing new visitor assets. Destination Missoula/TBID supports their desire to tell stories from their perspectives and in their languages, with potential for self-guided tours.

Destination Missoula understands the importance of supporting partners and organizations that are directly addressing issues such as housing, workforce, childcare, homelessness, and others, as they impact the visitor economy and the health of our community.

## VISIONING WORKSHOP

The key findings and insights gained through research and engagement were shared with the Steering Committee during a half-day Visioning Workshop. Using this information and drawing on their collective expertise, the Steering Committee worked collaboratively to imagine the future of tourism in Missoula and develop a series of strategic priorities and initiatives for the community to pursue as an outcome of this process. A Destination Vision statement was agreed upon to guide the future of tourism in Missoula and can be found on the following page.

## VALIDATION SESSION

As a result of the Visioning Workshop, the priorities and initiatives identified by the Steering Committee were analyzed and compiled into a Draft Destination Stewardship Plan. This was presented to the Steering Committee, Destination Missoula and TBID boards of directors, as well as funding partners and stakeholders, for feedback and validation of this work.

# Destination VISION

A shared vision for Missoula's future was created to guide the direction of this Destination Stewardship Plan. Based on the destination research, assessment, and stakeholder input collected during this process, the Steering Committee and project team worked together to imagine a collective vision for Missoula as a visitor destination in the year 2034.

A successful vision incorporates three key elements: first, it should be inspirational, meaning it is a vision that the community is inspired to achieve. Next, it should be aspirational, meaning that it is not a reflection of the community at the time it was created. Finally, the vision should reflect key priorities in the community.

**Through the extensive research and engagement phases of this project, three signature themes emerged as unique attributes of Missoula and helped guide the discussion for developing a vision:**

- Outdoor experiences and the rivers are a source of pride and identity for Missoulians.
- Missoulians are proud that all are welcome here.
- Missoula has a vibrant and diverse culture of arts and entertainment.

## IN 2034, MISSOULA WILL BE...

**A welcoming and dynamic mountain community where care and respect for all people and natural landscapes is our way of life.**

After careful consideration of community priorities, tourism opportunities, and attributes of Missoula, the Steering Committee and project team aligned around a vision that reflects priorities of inclusivity, responsible stewardship, and care for the community. It was important to stakeholders that Missoula's welcoming and inclusive nature be reflected to help illustrate that respect and care underpin the culture of Missoula. A diversity of communities and cultures are welcome in Missoula and should feel safe here without question.

Balancing residents' quality of life with protection and enhancement of the local environment is of utmost importance to Missoulians, and it was important that this guiding principle of stewardship serve as a north star for any and all considerations regarding tourism. It was also important that intentional consideration of resident and visitor experiences be included in a vision for Missoula's future. High quality experiences for all means supporting endeavors that enable a healthful, happy resident base and ensure that visitors have impactful and memorable experiences that inspire return visitation and sharing positively about all that Missoula has to offer.

# *Destination Missoula/TBID's Role in the* **DESTINATION STEWARDSHIP PLAN**

The strategic goals and recommendations in this plan are the result of a community-wide process and represent the ideas and aspirations of the people who live in, and contribute to, Missoula. In order to achieve the shared destination vision and strategic path articulated in this plan, it is critical to have collaboration from multiple sectors and partners across the Missoula region.

Each strategic goal in this plan is supported by subsequent initiatives that, in order to be successful, will require collaboration and collective support from the tourism industry, multiple partners, stakeholders, and organizations across Missoula. When successfully implemented, these goals and subsequent initiatives will make a positive impact on the quality of life, quality of experience, and quality of the economy in Missoula.

Destination Missoula/TBID does not own the assets and experiences related to the local visitor economy, and therefore, they cannot single-handedly advance the strategies and initiatives of this plan. Destination Missoula/TBID's role in implementing the Destination Stewardship Plan will be different for each initiative and will be articulated in a corresponding implementation plan to help guide this work. Destination Missoula/TBID's role will include one of the following:



## **LEAD:**

Destination Missoula/TBID takes the lead as the organization to advance initiatives.



## **PARTNER:**

Destination Missoula/TBID actively collaborates with other organizations, contributing as a key partner in advancing initiatives.



## **ADVOCATE:**

Destination Missoula/TBID advocates for the advancement of strategic initiatives.



## **CONVENE:**

Destination Missoula/TBID is the convener of groups and those in position to advance initiatives.



## **SUPPORT:**

Destination Missoula/TBID offers support to other organizations who are leading the advancement of initiatives.





# DESTINATION STRATEGIC GOALS

Five strategic goals emerged from the extensive research, assessment, and engagement work completed by the project team during the Destination Stewardship Plan process.

The five strategic goals and underlying initiatives detailed below provide a roadmap to help guide tourism related decision-making and priorities to enhance Missoula's visitor economy and strengthen the destination.

These goals offer guidance on how to bring the long-term destination vision to life and further enhance Missoula as a competitive destination that places stewardship at the forefront of its identity.

**#1**

Elevate and Enhance Stewardship

**#2**

Support Placemaking Enhancements

**#3**

Improve Transportation and Connectivity

**#4**

Strengthen Community Alignment

**#5**

Advance Destination Development

*Destination Strategic Goal*

# #1 Elevate and Enhance Stewardship

## WHAT THIS MEANS

Embodying stewardship practices to conscientiously manage natural resources, cultural heritage, and community well-being is integral to the vision of preserving the health and character of Missoula's natural environment. By prioritizing environmental and economic sustainability and fostering a stewardship ethos, we aim to safeguard the region's identity and ensure long-term sustainability of Missoula.

Implementing a destination management strategy to concentrate visitation in specific tourism areas will reduce foot traffic, minimizing negative environmental impacts caused by human activity in some locations. This approach preserves the beauty of Missoula's landscapes, including mountains, rivers, and valleys, while maintaining the health of fragile ecosystems. Completion of a comprehensive wayfinding system not only aids navigation but also prevents unintended environmental damage by guiding users away from sensitive areas.

Promoting a stewardship ethos involves an educational initiative to communicate key principles of showing reverence for people and places. Raising awareness about Missoula's stewardship approach informs both visitors and locals, fostering a culture of responsible tourism. Collaboration with Tribal nations integrates Indigenous wisdom into modern strategies, respecting local traditions and enhancing community relationships.

Furthermore, leveraging visitor dollars through voluntary fee collection programs empowers users to actively contribute to preserving cherished places and activities. This creates a sense of shared ownership and responsibility, ensuring the continued health and character of Missoula's natural environment.







*Destination Strategic Goal*

## **#1 Elevate and Enhance Stewardship**

### INITIATIVES

- 1.1 Collaborate to advance a unique destination management strategy centered on directing people to designated, high-use locations where impacts can be managed and mitigated with effective solutions for transit, waste management, wildlife management, infrastructure, enforcement, and education.
- 1.2 Develop a community-focused educational initiative to increase awareness of Destination Missoula's approach to stewardship and illustrate the value of tourism.
- 1.3 Seek ongoing collaboration with Tribal nations to inform, enhance, and share their Tribal stewardship strategy.
- 1.4 Participate in strategies that leverage visitor dollars to support development of community recreational infrastructure and stewardship initiatives (i.e., a voluntary visitor fee collection program).
- 1.5 Establish a community engagement role on the Destination Missoula team to manage stewardship initiatives.



*Destination Strategic Goal*

## #2 Support Placemaking Enhancements

### WHAT THIS MEANS

Placemaking enhancements will play a key role in cementing Missoula as a desirable and competitive visitor destination. They help create memorable experiences and bring Missoula's story and local character to life, making it more attractive, engaging, and impactful to visitors. Incorporating unique aesthetics, cultural richness, and vibrancy into public spaces invites visitors to connect with local culture, people, history, and heritage. These enhancements can also help define Missoula's character and differentiate it from similar or competing destinations, such as Bozeman, Montana or Bend, Oregon.

Strategic advocacy and support of arts and cultural initiatives will help Missoula's creative economy thrive and support local music venues, art galleries, museums, theater companies, and more. Advancements in this sector have the potential to enhance vibrancy by infusing Missoula with diverse cultural experiences and attracting artists, performers, and creatives to the region. Supporting the work of Heritage Missoula and collaborating with cultural groups to creatively deploy digital technologies – such as QR codes to hear spoken Indigenous languages – can help visitors discover and connect to content that amplifies the region's history and legacy, pay tribute to its natural landscapes, and narrate local stories.

Missoula's sense of place can also be strengthened by incorporating elements of local culture, language, and design into the user experience at culturally relevant locations throughout the region. Creative enhancements to various mediums of the visitor experience – like wayfinding signs, public spaces, buildings, waste receptacles, and more – can infuse local history and memorable character into the user experience at prominent locations throughout Missoula.





*Destination Strategic Goal*

## #2 Support Placemaking Enhancements

### INITIATIVES

- 2.1 Advocate for strategies to integrate arts and cultural experiences into community life and public spaces to support the local creative economy and enhance Missoula's standing as a place that values artists and makers.
- 2.2 Support the work of Heritage Missoula to share the region's heritage, history, and culture with all.
- 2.3 Incorporate the culture, heritage, stories, and language of local Tribal nations into culturally relevant locations to enhance Missoula's sense of place (i.e., use digital mechanisms to share spoken Indigenous language).
- 2.4 Advocate for completion of a comprehensive wayfinding system that supports navigation around the community.



*Destination Strategic Goal*

## #3 Improve Transportation and Connectivity

### WHAT THIS MEANS

Consideration for how people connect and move throughout Missoula is an essential component for a thriving destination. Enhancing transportation options, connectivity, and destination access remains crucial for Missoula's success as both a sought-after visitor destination and a desirable community for residents.

A robust public infrastructure plays a pivotal role in shaping Missoula's success, directly influencing accessibility and convenience for both residents and visitors. Adequate transportation infrastructure – including quality roads and bridges, accessible public transit, reliable public Wi-Fi, and alternative transportation – improves mobility and connectivity and enables users to effortlessly explore the region. An enhanced transportation system can encourage prolonged stays and extensive exploration, often resulting in increased spending benefitting the Missoula economy. Effective transportation not only nurtures economic growth by facilitating the movement of goods and people, but also aligns with Missoula's commitment to responsible tourism and destination stewardship. Addressing the need for improved connectivity in Missoula involves providing residents and visitors with reliable, frequent transit options that support independent living and seamless navigation.

Initiatives like new electric vehicle charging stations and expanded Mountain Line bus services aim to connect users with experiences and services across the region. Providing transportation connections for residents and visitors to high-use locations like trail systems and river access points can reduce dependency on car rentals and reduce congestion at trailheads. Encouraging alternative transportation can reduce personal vehicle trips, alleviate congestion, minimize environmental impact, and promote responsible, sustainable travel practices.

Additionally, enhancing transportation access through expanded air service to Missoula Montana Airport and restored Amtrak passenger rail service offers efficient travel options for both locals and visitors. These improvements not only connect Missoula to new markets but also support local businesses, stimulate economic activity, and create novel opportunities for rail travel in the area. This comprehensive approach reflects Missoula's commitment to responsible tourism, environmental protection, and a vibrant, well-connected community.







*Destination Strategic Goal*

## #3 Improve Transportation and Connectivity

### INITIATIVES

- 3.1 Advocate for expanded public transit and bikeways and develop creative messaging that encourages visitors and locals to use alternatives that reduce traffic congestion and parking pressure, especially in high-use locations.
- 3.2 Expand sustainable air service and reduce the cost of airfares for Missoula Montana Airport by creating a coalition to support a year-round effort to fund flight incentives for targeted air carriers and routes, and educate on the importance of air service funding.
- 3.3 Support existing and future enterprises to augment transportation options, for example, the Great American Rail-Trail and Big Sky Passenger Rail Authority's quest to restore Amtrak passenger rail service to Missoula and southern Montana.
- 3.4 Advocate for expanded broadband service to advance communications and digital connectivity throughout the region.
- 3.5 Advocate for an expanded network of electric vehicle charging stations throughout the region to support plug-in vehicle users and encourage and attract sustainable travel.



*Destination Strategic Goal*

## #4 Strengthen Community Alignment

### WHAT THIS MEANS

Missoula holds a distinctive charm that is rooted in its tight-knit, inclusive community and culture of care for one another. To maintain its reputation as a welcoming place for all, it's important that all people in Missoula feel safe and valued. Strengthening its welcoming atmosphere and fostering community unity involves more than just hospitality; it requires cultivating an inclusive environment where everyone is respected. This not only enhances Missoula's standing as a destination but also cements its identity as a community founded on care, inclusivity, and respect—a place where both residents and visitors can flourish.

Embracing and amplifying an intentional culture of welcome creates a safe space for all. Doing so not only supports tourism, it also strengthens Missoula's image as a caring community. Targeted messaging can highlight Missoula's commitment to inclusivity, attracting like-minded visitors seeking genuine connections and experiences, thereby boosting tourism and fostering a sense of belonging for residents and visitors alike.

Investing in accessibility reviews and improvements prepares Missoula to welcome all visitors and can help position itself as a leading destination in this space. Supporting organizations and initiatives that address public safety concerns can help ensure an inviting environment for residents and visitors. A community ambassador program to help root the workforce and residents in local culture, resources, and ideas can be a positive way to share information and appreciation for Missoula.

Missoula residents are the backbone of the workforce supporting tourism, and without necessary infrastructure to support the workforce and provide the services needed for tourism to succeed, the local economy may be negatively impacted. Advocating for policy changes to support workforce development, housing, and childcare demonstrates a dedication to the well-being of Missoula residents.

Special lodging rates for Montana residents during off-peak seasons strengthen alignment with Montanans from other regions, fostering a sense of pride among locals and nurturing a symbiotic relationship between Montanans. These initiatives showcase Missoula's dedication to well-being, enriching the community, and reinforcing its commitment to prioritizing its people.





*Credit: Dennis Webber*

### *Destination Strategic Goal*

## **#4 Strengthen Community Alignment**

### **INITIATIVES**

- 4.1 Develop messaging that establishes Missoula as a welcoming community where differences are respected and people genuinely care for others.
- 4.2 Invite tourism and hospitality businesses and other organizations to participate in a physical accessibility review and address recommendations to enhance Missoula's position as a welcoming place for people of all abilities.
- 4.3 Support creation of a community educational initiative to root workforce and residents in local culture, stewardship ethos, and ways of sharing Missoula-style hospitality.
- 4.4 Support organizations and initiatives that address public safety concerns and create solutions.
- 4.5 Advocate for policy and legislative initiatives that support training, development, housing, and childcare for Missoula's workforce.
- 4.6 Encourage tourism partners to develop and promote special rates for Montana residents and groups to drive overnight visitation and build Missoula's reputation as a place that cares about Montanans.



*Destination Strategic Goal*

## #5 Advance Destination Development

### WHAT THIS MEANS

Strategic destination development involves purposefully maintaining and improving Missoula's assets and infrastructure to enrich the overall local experience. This approach, when executed thoughtfully, stimulates the local economy, preserves resources, and instills community pride—without compromising the unique qualities that attract visitors. The strategic development initiatives recommended here focus on economic, environmental, and cultural resilience, supporting positive visitor experiences while enhancing local quality of life.

Investing in a large-scale multi-use events center aligns with these goals by driving visitation through entertainment, sports tourism, and meetings and conventions. This state-of-the-art venue can serve as a hub for diverse events, bolstering Missoula's competitive edge throughout the year. Promoting the city's distinctive blend of outdoor activities, vibrant arts, and unique landscape raises awareness and draws attention from out-of-state visitors. Collaborating with experience providers and hospitality partners to offer diverse packages can not only expand options for visitors, but can also encourage off-peak visitation, boosting the local economy.

Fostering entrepreneurship by connecting visitors with local makers and creatives adds depth to Missoula's appeal, with potential to tap into corporate and retreat group travel markets. Missoula's proximity to the outdoors is undoubtedly one of its biggest calling cards, and advocating for investment in the outdoor recreation landscape leverages Missoula's proximity to nature, solidifying its reputation as a premier outdoor destination. Finally, supporting initiatives that will provide additional housing and commercial spaces as a result of development or redevelopment activities, will support the workforce, provide new opportunities in the local economy, and contribute to a higher quality of life for residents.

Thoughtful investment in tourism assets goes beyond attracting visitors; it nurtures an ecosystem benefiting both residents and travelers and fosters diverse, high-quality amenities. By embracing initiatives that foster community alignment, enhance local offerings, and invest in infrastructure, Missoula will strengthen its position as a premier outdoor and arts destination, supporting economic growth while preserving its authentic, distinctive character.



*Destination Strategic Goal***#5 Advance Destination Development****INITIATIVES**

- 5.1 Advocate for development of a large indoor multi-use center supporting large-scale events year-round, potentially through a partnership among the city and county.
- 5.2 To attract responsible travelers, build out-of-state awareness of Missoula as a welcoming community with extraordinary access to recreation and outdoor experiences, a vibrant arts and culture scene, and a strong commitment to environmental and cultural stewardship.
- 5.3 Collaborate with experiential and hospitality partners (such as music venues, hoteliers, winter recreation) to create packages offering sports, recreational, cultural, and cold-season activities to encourage off-peak visitation.
- 5.4 Advocate for strategies to grow Missoula as a premier outdoor recreation destination (e.g., a comprehensive trail mapping plan) and support other trails initiatives.
- 5.5 Support programming and development of recreation projects, such as Marshall Mountain, as resources for a wide range of users.
- 5.6 Support opportunities arising from development and redevelopment of city neighborhoods to create housing and commercial spaces available to a broad range of people.
- 5.7 Seek opportunities to advance local entrepreneurship and economic development through strategies connecting visitors with local manufacturers and makers.





## NEXT STEPS

To be successful, long-term strategic planning requires dedicated capacity and significant focus on implementation. To support the success of the Destination Stewardship Plan, a corresponding implementation plan has been shared with Missoula.

The implementation plan prioritizes actions for the first three years of the plan, articulates which organizations should be included, and outlines Missoula's roles and responsibilities.

As stewards of the Destination Stewardship Plan, Destination Missoula/TBID will serve as the champion organization to guide implementation of this work. It is recommended that Destination Missoula and the TBID appoint a dedicated position responsible for the implementation and ongoing work of the plan, and establish an implementation committee to provide guidance throughout the process.



# APPENDIX

Local State of the Industry • Visitor Profile Study



## LOCAL STATE OF THE INDUSTRY

This section provides an overview of Missoula's current tourism position in 2024 in relation to the larger global tourism economy.



### **Travel sentiment is positive but high costs keep interest below pre-pandemic levels.**

- In mid-2022, pandemic-driven interest in outdoor destinations dropped due to rising rates, prices, and recession concerns.
- MMGY's Travel Sentiment Index indicates U.S. travel interest remains positive, but high costs persist as the main travel obstacle.



### **Even the wealthiest households are beginning to push back on high prices.**

- High prices and other financial constraints may limit travel for middle- and lower-income households and weaken volume for economy-oriented travel products.
- Despite falling occupancy since mid-2022, lodging operators in Missoula maintain elevated pandemic-era prices. Sustained high hotel rates in Missoula may be a barrier for potential visitors of all income levels.

**Growing price resistance from the top 15% of high-net-worth U.S. households is expected to drive lower fares and hotel rates nationwide this year.**



### Interest in the outdoors remains high.

- As Missoula experienced firsthand, interest in the outdoors surged in 2020 and 2021, and while interest dropped from those levels in 2022, overall interest in outdoor experiences remains high.
- Based on recent data from Tripadvisor, interest in outdoor experiences has stayed above pre-pandemic levels, and outdoor activities are increasing in overall popularity.



### The global tourism industry is on track for high growth.

- Despite historic pressures in recent years, the outlook for the global tourism economy is promising.
- Projections from both the World Travel and Tourism Council and the International Monetary Fund indicate a growth rate of 6% per year for the global industry over the next decade, reaching \$16 trillion.

### PROJECTED RISE OF INDUSTRY VALUE

\$9 trillion in 2019

\$13 trillion by 2025

10% of the world's GDP



### Business travel is on track to surpass 2019 levels in 2024.

- In 2024, the Global Business Travel Association predicts worldwide business travel spending will surpass 2019 levels.
- Missoula and other leisure-focused destinations enjoyed a strong early recovery from the pandemic, but more business-focused destinations are on track to over-perform in 2024.

This signals a potential shift in the balance between leisure and business travel in Missoula and enhanced infrastructure needs to support the business travel market.



### Road trippers are high-spending travelers.

- In August 2023, a Longwoods International study found that highway travelers are highly likely to stay in paid lodgings and leave a strong economic impact by partaking in local offerings like historic sites and museums, outdoor activities, and entertainment.
- Given Missoula's reputation as a frequent stopover, strategically targeting road trippers could bring substantial economic benefits to the city.



### Positive feelings about tourism are more common than negative ones.

- According to Future Partners' State of the American Traveler study (October 2023), travelers believe their trips deliver many benefits to the places they visit.
- There are also concerns around the impacts of travel on crowding, traffic, natural areas, and local culture.

68.2% of travelers agree that tourism supports local businesses.

60% of travelers believe tourism helps fund community services.

55% of travelers say tourism supports local events.





### Americans say overtourism will prevent them from visiting a destination.

- The Future Partners study also found that 52% of U.S. travelers say overcrowding will keep them away from a destination.
- This finding strongly validates the importance of thoughtfully managing the impacts of visitation in Missoula and preserving high quality experiences.



### Travelers, especially younger ones, are increasingly prioritizing “green” travel.

- Willingness to pay more for lodgings with green initiatives is on the rise, especially among business travelers and families.
- This trend signals the strong potential of Destination Missoula/TBID’s commitment to advancing destination stewardship as a way of attracting more responsible travelers and safeguarding local resources.

**The Future Partners’ Destination Stewardship Edition of its State of the American Traveler study shows growing interest in lodgings with “green” initiatives, especially among millennials.**

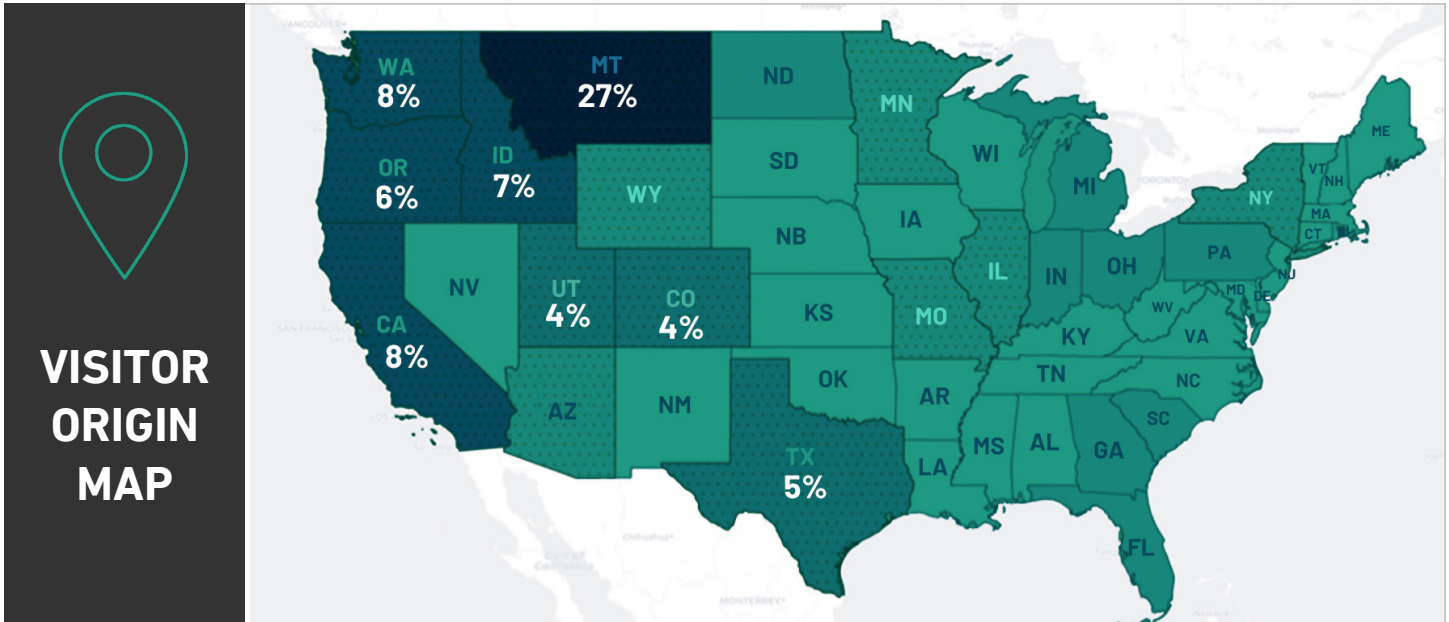
32% of overall travelers report staying at hotels with green practices  
 45% of millennial travelers report staying at hotels with green practices

## TOURISM IMPACT AND RECENT DEVELOPMENTS IN MISSOULA:

- \$390.4 million economic impact (FY 22-23)
- 3.5 million total visitors (FY 22-23)
- 1.57 million overnight visitors (FY 22-23)
- 4,687 Missoula jobs in 2022
- \$29.4 million generated in state and local taxes
- Missoula Public Library named World’s Best Library in 2022
- Missoula Butterfly House & Insectarium
- Montana Museum of Art and Culture

# 2023 MISSOULA VISITOR PROFILE STUDY

To explore travelers' perceptions of Missoula and develop a visitor profile, the project team engaged national tourism research firm SMARInsights to conduct a Visitor Profile Study as part of the Destination Stewardship Planning process.



## VISITOR ORIGIN MAP

### COMPETITIVE SET OF DESTINATIONS:

The following destinations were used by SMARInsights in their analysis as the competitive set to explore and compare visitor perceptions of Missoula:

- Bend, Oregon
- Boise, Idaho
- Bozeman, Montana
- Flagstaff, Arizona
- Fort Collins, CO
- Spokane, Washington



948

### TOTAL SURVEY PARTICIPANTS

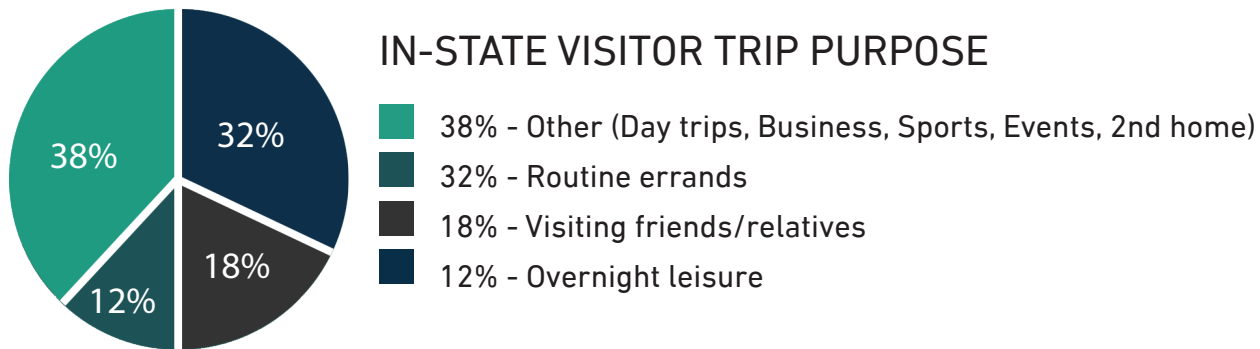
447 **previous** visitors to Missoula

501 **potential** visitors to Missoula

Of those surveyed, 27% were Montana residents. Other top origin states included Washington, California, Idaho, and Oregon. According to the study, a large portion of Missoula's visitors originate in Montana and the Pacific Northwest, though it is a destination that draws visitors from across the United States.

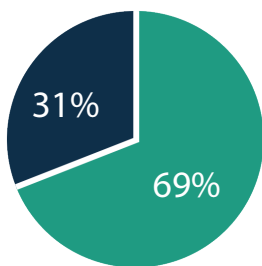
**The following insights emerged as a result of the Visitor Profile Study:**

**Missoula has potential to attract more out-of-state visitation and to convince more Montana residents to come for leisure trips.**

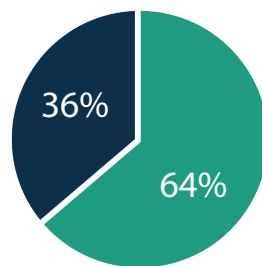


**For many visitors, Missoula is either part of a larger trip or a place they pass through on their way to somewhere else.**

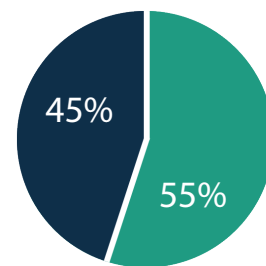
OVERNIGHT LEISURE VISITORS



PEOPLE VISITING FRIENDS/RELATIVES



DAY TRIPPERS



■ Missoula was my primary destination    ■ Missoula was not my primary destination.

**Most overnight visitors — even those visiting friends and relatives — stay in paid lodgings, typically in a hotel or motel.**



**6%** of overnight leisure visitors choose short-term rentals, compared to 8% national average.



**16%** of overnight leisure visitors choose to camp. About 10% of those visiting friends/relatives.



**2.5** is the average number of nights overnight leisure visitors stay.



## Out-of-state visitors were more likely to express interest in supporting the local environment.



**32%**

of out-of-state visitors were identified by the study as “responsible” travelers, compared with 22% of in-state residents.

“Responsible travelers” can be generally defined as those who plan trips thoughtfully to minimize impacts and respect local environments and customs.

## Missoula’s most powerful draws include scenic drives and nearby national parks.



**40%** of visitors take a scenic drive  
**20%** of visitors see a national park



**2/3** of visitors name these activities as top motivators. Others include dining out, sightseeing, shopping, hiking on trails and visiting historical sites or museums.

## Visitors give Missoula high marks, with 85% rating their experience as excellent or very good and many reporting they may return within a year.



**90%** of in-state visitors reported they are likely to return in the next year

**80%** of out-of-state visitors reported they are likely to return in the next year

Of those who weren't planning to return, many visitors said they didn't feel a desire to come back.

Barriers to return:

- High hotel costs: 28% of in-state visitors and 9% of out-of-state visitors cited this as a reason they do not plan to return to Missoula.
- Gas prices: 27% of overall visitors said gas prices would keep them from visiting again.

## Travelers give Missoula and Bozeman equally high ratings as a place to visit.

- Flagstaff and Bend ranked close behind the two Montana cities, while Spokane and Boise lagged the competitive set.
- Both Missoula and Bozeman were considered good places to explore the outdoors and find adventure.
- Missoula ranked somewhat higher than Bozeman for river experiences, relaxation, and mountain biking. Both Montana cities ranked well for valuing the protection of their natural resources.

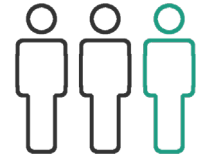


## Out-of-state travelers see Missoula and Bozeman in much the same light.

- The two cities may be competing for the same image. Both index high for being outdoorsy, picturesque, active, and safe.
- Along with Bend, the two Montana cities are seen as good places for river experiences.
- However, while Missoula joined Boise and Fort Collins as places thought to deliver good value for the money, Bozeman, Spokane, Bend, and Flagstaff were rated below-average in this category.

## Montana residents see Missoula much differently from out-of-state travelers.

In-state residents are far more likely to think of Missoula as hip, and a good place to enjoy college sports, craft beverages, river experiences, and music.



To attract more out-of-state visitors, Missoula could position itself as a friendly, vibrant place with a fun vibe that offers good value, a variety of accommodations, and opportunities to be active and find adventure.

## “Responsible” travelers currently account for about 30% of Missoula’s visitors.



To attract more travelers who care about protecting the environment and supporting the local community, Missoula may position itself as a playful, artsy getaway destination with a good music and performing arts scene that is welcoming for everyone and has great culinary offerings and experiences.







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