

WHITEFISH MONTANA

EXPLORE WHITEFISH
WHITEFISH CONVENTION & VISITORS BUREAU
FY22 MARKETING PLAN
July 1, 2021 to June 30, 2022

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FY22 MARKETING PLAN EXECUTIVE SUMMARY

Whitefish, Montana is an authentic mountain town located in the northern Rockies, home to some of the world's most beautiful mountains and spectacular, unspoiled nature. Just 25 miles from Glacier National Park, Whitefish offers close access to the hanging valleys and emerald peaks of this UNESCO World Heritage Site. The majority of our visitors come during the summer months of late June, July, August and early September. This seasonality presents problems for the many small businesses dependent upon non-resident travelers. As a result, we spend a large majority of our marketing budget on promoting the winter and shoulder seasons. The influx of approximately 3 million Glacier National Park visitors annually allows Whitefish to offer excellent dining, expansive lodging options, and exceptional recreational opportunities. Having a viable, robust downtown is very attractive to our visitors. We are also home to Whitefish Mountain Resort, offering 3,000 acres of great skiing, abundant snow and incredible views of Glacier National Park as well as world class mountain biking in the summer and early fall months.

Whitefish aligns perfectly with the Montana Brand pillars:

- More spectacular unspoiled nature than anywhere else in the lower 48
- Vibrant and charming small towns that serve as gateways to our natural wonders
- Breathtaking experiences by day and relaxing hospitality at night

We utilize the Montana Brand pillars in unison to create a cohesive and encompassing message. In our ads and collateral, we serve up beautiful high resolution photos of the scenic beauty and incredible nature that surrounds us. Photos of our iconic downtown are an important part of our collateral. Visitors are very attracted to our downtown and it is a primary economic driver for the town. In addition, we try to counter the preconceived notions that Montana is remote and does not have adequate facilities by showcasing the beautiful lodging and incredible dining that can be found here. **Exhilaration by day and comfort by night** truly defines us.

Whitefish Mountain Resort is our most important marketing partner and is consistently ranked high in the annual *SKI Magazine* Resort Guide. In winter, if the ski resort does well, the town benefits. The addition of enhanced on-mountain activities at the resort has increased their summer and early fall offerings and has also resulted in international recognition as a mountain biking destination.

Seattle, Portland, Minneapolis, Chicago, California, and regional drive-to markets including Spokane, Washington are our core geographic markets identified as having the largest potential for growth. Alberta, Canada is an established geographic market with historically strong visitation to Whitefish. However, fluctuations in international currency rates severely affects visitation and spending from Alberta, Canada. Restrictions on nonessential travel across the Canadian border during the pandemic has also drastically affected visitation and spending. As a result, we are cautious to not become overly reliant on this single market.

We measure our effectiveness in several ways. The Whitefish Resort Tax is a great indicator of how businesses are performing. A total of 3% is levied on lodging, restaurants/bars, and many retail items. The Lodging Facility Use Tax collected by accommodations in Whitefish is an indicator of overnight stays. We also compare the Explore Whitefish Tourism Promotion Assessment (TPA) year to year. This is a voluntary 1% fee that local restaurants, rental car agencies, and lodging facilities place on each guest check. The TPA accounts for most of our private funding. We also offer memberships to businesses located within the 59937 postal code of Whitefish. We track the effectiveness of our campaigns through various metrics: click through rates, website success measurements, travel guide requests, social media engagement, public relations audience reach, etc. In light of the Whitefish Sustainable Tourism Management Plan (STMP), we have also introduced destination stewardship goals focused on implementation of the STMP and integration into the Whitefish Brand, including the first iteration of a peak season on-the-ground visitor education campaign.

This peak season-on-the-ground visitor education campaign is firmly rooted in the community values developed during the creation of the COVID safety focused 'Be A Friend Of The Fish' campaign and informed by the STMP plan.

Be A Friend Of The Fish: Community Values

Take it Slow. Enjoy the Ride

- Slow down and take a deep breath. Enjoy and notice the quiet pace of life in Whitefish and the beauty that surrounds all of us in every moment.
- Walk, ride, or hop on the S.N.O.W bus before you drive.

Recreate Responsibly

- Recreate responsibly, be prepared for anything, and have a backup plan.
- Wait for fall, winter or spring to visit. Experience natural beauty with less crowds.

Be a Steward of the Land

- Protect public lands, respect private lands, and always give wildlife the right of way.
- Recycle and be responsible with your waste (TP too). Leave No Trace!
- Share your photos responsibly. Preserve the landscape rather than piling up “likes.”

Show Respect and Kindness

- Ignite inclusive conversations and show mutual respect for locals and visitors.

Fuel our Local Businesses

- Fuel up at local businesses. Our merchants, restaurants and hotels rely on your support!

Help us Stay Healthy

- Help us all stay healthy by observing local health guidelines.

Our Public Relations Program has been incredibly effective. Because we have an experienced and talented PR team, we have also been able to craft and effectively implement crisis communication strategies in partnership with the City of Whitefish, including the ‘Be A Friend Of The Fish’ campaign. The PR team also works directly with media and digital influencers as well as other targeted promotions to bring a very desirable return on investment.

We utilize many sources for our research that validates our marketing plan. The non-resident data collected by the Institute for Tourism and Recreation Research (ITRR) at the University of Montana is an invaluable tool for determining where our customers come from, what they do, how much they spend, what they like and do not like. We also use data from the US Travel Association (USTA) for broad industry indicators as well as Smith Travel Research, AirDNA, and VisaVue for data on lodging occupancy and visitor expenditures. In addition, the information provided by the Montana Office of Tourism and Business Development (MOTBD) regarding the effectiveness of campaigns, ad awareness, likelihood to travel, etc. also determines the co-op advertising opportunities in which we participate.

Explore Whitefish is very pleased with the progress we have made in the past few years, especially during the past year given all of the factors surrounding the COVID-19 pandemic. While Whitefish FY20 Resort Tax collections were down approximately 4% over the previous year, through January 2021, Whitefish FY21 Resort Tax collections are up over 4% compared to the previous year, which was before the pandemic hit Whitefish. The Resort Tax is a good indicator of the state of the economy because the 3% tax is collected on lodging, restaurants/bars and many retail items. Our recent shoulder season efforts are also showing great success. While the 2020 calendar year Lodging Tax collections for Whitefish decreased -14% compared to the previous year, we had a very strong finish to the year with Oct-Dec 2020 Lodging Tax collections +32% compared to the previous year. In 2020, approximately 610,236 nonresident travelers spent at least one night in Whitefish. This is about a 1% decrease from 2019.

1 NARRATIVE

1.1 PURPOSE OF THIS MARKETING PLAN

The purpose of the Explore Whitefish Marketing Plan is to sustainably grow the economy of Whitefish by emphasizing its desirability as a travel and recreation destination to non-resident visitors who appreciate and respect the character of the place.

We recognize the strain that increased summer visitation places upon our town. As such, Explore Whitefish supports business strategies that emphasize economic and social benefits to our community while maintaining the integrity of place and quality of life of local residents. Our mission is to build a high level of awareness and intent to travel by developing support for Whitefish as a premier year-round mountain town. This includes increasing the occupancy for lodging facilities in Whitefish during lower occupancy times of the year. Explore Whitefish has also taken a lead in destination stewardship with the development and implementation of the Whitefish Sustainable Tourism Management Plan (STMP) which aims to balance the economic vitality of the tourism economy with social, community, and environmental benefits.

Established by the City of Whitefish, Explore Whitefish is the officially designated organization charged with tourism promotion and marketing of Whitefish. The organization also provides critical support for visitor information services, destination stewardship, travel infrastructure development, market research, and public relations.

1.2 ABOUT WHITEFISH, MONTANA

Whitefish, Montana is an authentic mountain town located in the northern Rockies, home to some of the world's most beautiful mountains and spectacular, unspoiled nature. Just 25 miles from Glacier National Park, Whitefish offers close access to the hanging valleys and emerald peaks of this World Heritage Site. The summer season has historically been the busy season for Whitefish, with Glacier National Park as a key draw. Whitefish Lake, at the edge of town, has also been a popular warm season draw. Research also indicates that visitors are attracted to Whitefish because of the distinctive and inviting qualities of the eminently walkable downtown and Central Avenue district.

The world-class ski slopes and facilities of Whitefish Mountain Resort serve as a key driver for winter visitation to Whitefish. The relationship between the mountain resort and the town of Whitefish is symbiotic. As a result, improving and enhancing the connectivity of the mountain and the town experience helps improve the economic outcomes of both and improves the overall visitor experience as well. Whitefish Mountain Resort summer activities have expanded considerably over the last several years, improving the summertime vitality of the mountain resort experience as well as enhancing the overall attraction of Whitefish as the preferred place to base a northwest Montana and Glacier National Park region vacation.

1.3 WHITEFISH, MONTANA AND THE MONTANA BRAND

Whitefish aligns perfectly with the Montana Brand pillars. In all our ads and collateral, we serve up beautiful high resolution photos of the scenic beauty and incredible nature that surrounds us. Photos of our iconic downtown are an important part of our collateral. Visitors are very attracted to our downtown and it is a primary economic driver for the town. In addition, we try to counter the preconceived notions that Montana is remote and does not have adequate facilities by showcasing the beautiful lodging and incredible dining that can be found here.

While the incredible scenic and wild landscapes that surround Whitefish are a key and compelling inspiration to travel to Whitefish, these landscapes are placed in the context of hospitality. The broad majority of travelers are intimidated by wildness without the tempering possibility of civilization. Beyond the adventure of wilderness by day, they want a good place to eat and a comfortable place to sleep. We utilize the Montana Brand pillars in unison to create this cohesive and encompassing Whitefish experience which is communicated in our marketing efforts.

1.4 STRENGTHS, CHALLENGES, AND OPPORTUNITIES OF WHITEFISH RELATIVE TO OTHER DESTINATION MOUNTAIN TOWNS

STRENGTHS

- Whitefish aligns perfectly with the three Montana Brand pillars
 - More spectacular unspoiled nature than anywhere else in the lower 48
 - Vibrant and charming small towns that serve as gateways to our natural wonders
 - Breathtaking experiences by day and relaxing hospitality at night
- Proximity to Glacier National Park — National travel forecasts have predicted an increase in travelers expressing an interest in visiting sites managed by the National Park Service. In addition, the significant name recognition that Glacier National Park holds among North American and international travelers provides an advantage to “putting Whitefish on the map” for potential visitors. According to the National Park Service, visitors to Glacier National Park spent an estimated \$356 million in local gateway communities during 2019 (+3.5%). An estimated \$146 million of those dollars were spent on lodging, comprising the highest percentage of expenditure at 41% of the total expenditures. Visitors spent an estimated \$57.4 million on restaurants, comprising the second highest percentage of expenditures at 16% of the total expenditures. Visitation to Glacier National Park continues to be very strong with approximately 3 million visitors in 2019. The numerous effects of the pandemic in 2020, including the east side of Glacier National Park being closed during peak season and the entire park being closed in the spring, contributed to park visitation being down approximately 44% in 2020. Through the first two months of 2021, visits are already outpacing last winter by over 27%. Increased visitation provides us with the opportunity to highlight the many visitor experiences available outside of Glacier National Park, particularly in Whitefish.
- Downtown Whitefish and the alluring character of the town’s built environment — Research indicates that visitors are attracted to the character and scale of Whitefish, especially the town’s Central Avenue district. These are attributes that form the foundation of the town’s appeal to visitors who stay in, or around the community, eat at the town’s various restaurants, and shop at local stores. Additional amenities such as pedestrian friendly sidewalks, miles of trails and ability to see the night’s sky all add to the Whitefish character.
- Access to recreational activities — A wide variety of recreational opportunities in and around Whitefish is a major draw for visitors. These include Whitefish Mountain Resort, the Whitefish Trail, Whitefish Lake Golf Club, Whitefish Lake, and the Whitefish River, as well as the trails, rivers and scenic roadways in and around Glacier National Park.

CHALLENGES

- Limited Transportation Infrastructure — Public transportation options and visitor infrastructure services in and around Whitefish and Glacier National Park are fewer than those provided at competitor destinations.
- Highly Seasonal Visitation Patterns — Visitation patterns to Whitefish are highly seasonal with the majority of visitation occurring during the high demand months of July and August. This seasonality impacts the operating effectiveness of Whitefish businesses that must accommodate these aforementioned demand swings.
- Limited Access To And Traffic Issues On The Going-to-the-Sun Road — The Whitefish summer tourism season is directly tied to the opening and closing dates for automobiles on the alpine section of the Going-to-the-Sun Road in Glacier National Park.
- Uncertain Weather — During some years, low snow levels in the winter hamper winter visitation and spending while summer fire seasons affect willingness for visitors to travel in summer and fall.
- Market Perception — Research performed by the Montana Office of Tourism and Business Development in key destination markets reveals that Montana is perceived to offer lower quality amenities and services to visitors. While Montanans are perceived as being friendly, it should be distinguished that this friendliness does not automatically translate into a guest’s perception of a high level of service.
- Lack of Competitive Pricing for Air Access and Limited Seats Outside of Summer Season — When compared to mountain communities with which Whitefish competes for destination visitors, airline seats to Glacier Park International Airport are limited outside of the summer season, with fewer flights, limited markets and are priced higher. Within the state, deboardings at Glacier Park International Airport (210,458 in

2020) accounted for 17% of the total deboardings in the state, tied with Missoula (17%) and trailing only Billings (19%), and Bozeman (35% - See Appendix). While deboardings at Glacier Park International Airport during the pandemic year of 2020 decreased approximately 40%, they had been rapidly increasing, with 2019 deboardings showing a 15% increase from 2018, indicating that Glacier Park International Airport is one of the fastest growing airports in the state. Passenger numbers for 2021 are projected to be strong once again. Also, the work of Glacier AERO on new and expanded shoulder season air service continues to yield increases in seat capacity year over year.

- International Travel — The uncertain climate related to international travel to the U.S. as a result of the pandemic has resulted in a decrease of international travelers, particularly Canada.
- COVID-19 — Due to the fluid nature of the current situation, it is very difficult to predict visitation trends to Whitefish and when we will be back to historic shoulder season levels of visitation.

OPPORTUNITIES

- Highly seasonal visitation patterns allow for the ability to increase lodging occupancy and visitor expenditures during the shoulder and winter seasons through Explore Whitefish marketing efforts.
- Reach peak season visitors with responsible travel messaging during their stay in Whitefish and the surrounding area.
- Collaborate with local stakeholders, Glacier National Park, regional, and state tourism partners to develop and build out support for shoulder season visitation and to communicate with visitors during the peak season.

1.5 KEY TRAVEL BUYER MOTIVATIONS FOR WHITEFISH, MONTANA

Whitefish experiences an uneven cycle of visitation with a busy summer season that operates with high lodging occupancy. Deep shoulder seasons include early spring and late autumn, with moderate visitor activity during the winter season. Higher winter activity and occupancy exists during the Christmas holiday period and also during select holiday periods throughout the ski season. Therefore, we focus our marketing efforts on the shoulder and winter season in our stated target markets in order to increase lodging occupancy and visitor expenditures.

WHITEFISH CITY LIMITS AVERAGE LODGING OCCUPANCY BY QUARTER

Source: SMITH TRAVEL RESEARCH, Calendar Year 2020

- January - March: 40.3% (-6.2%)
- April - June: 33.4% (-43.2%)
- July - September: 71.3% (-12.5%)
- October - December: 42.7% (-3.6%)
- Calendar Year 2020 Average Lodging Occupancy: 47.4% (-16.9%)

WHITEFISH SHORT TERM RENTAL CITY LIMITS AVERAGE LODGING OCCUPANCY BY QUARTER

Source: AirDNA, Calendar Year 2020

- January - March: 37.3% (+2%)
- April - June: 51.9% (+33%)
- July - September: 69.4% (+14%)
- October - December: 36.6% (+29%)
- Calendar Year 2020 Average Lodging Occupancy: 48.8% (+18%)

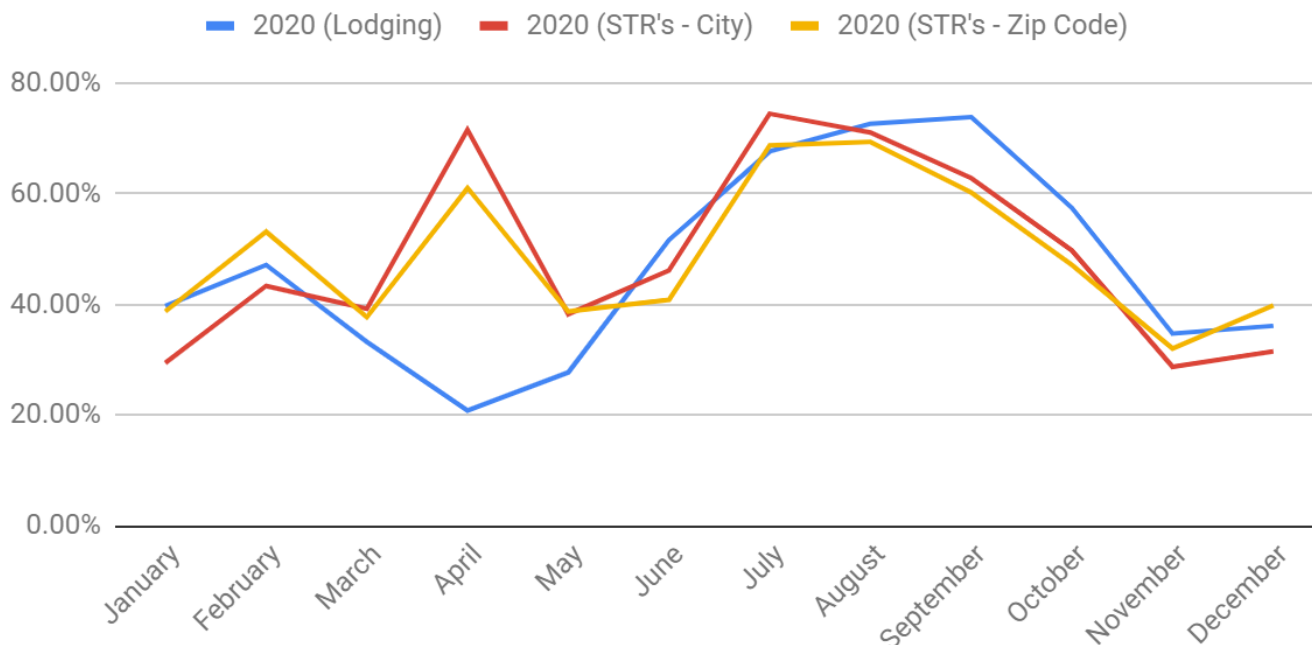
WHITEFISH SHORT TERM RENTAL ZIP CODE (59937) AVERAGE LODGING OCCUPANCY BY QUARTER

Source: Source: AirDNA, Calendar Year 2020

- January - March: 43.2% (+2%)
- April - June: 46.8% (+27%)
- July - September: 66% (+14%)
- October - December: 39.6% (+31%)

- Calendar Year 2020 Average Lodging Occupancy: 48.9% (+17%)

Whitefish Lodging Occupancy: 2020



Data: Smith Travel Research (STR), Air DNA, Graph and Averages Calculated by Whitefish CVB

Summer occupancy is primarily driven by the town's proximity to Glacier National Park. The quality lodging opportunities, dining and nightlife possibilities coupled with the town's distinctive downtown environment have made Whitefish a preferred location to base a vacation to the Glacier National Park region. Summer visitation is also supported by the attractions of Whitefish Lake and the expanding attractions in addition to Glacier National Park including the Whitefish Trail and other recreational opportunities in and around town. The activities available at Whitefish Mountain Resort enhance the downtown shops, restaurants and galleries of the town itself. Many warm season festivals and events support the active and vibrant social environment of the town's core, which serves as a key visitor attraction.

Winter travel is primarily driven by the skiing and snowboarding opportunities at Whitefish Mountain Resort. However, this relationship has become increasingly symbiotic as winter visitors increasingly seek off-slope activities as part of their vacation. Winter experience in Glacier National Park, including cross-country skiing, snowshoeing, and sightseeing are examples of unique off-slope activities increasingly promoted by Explore Whitefish. Furthermore, travel groups may include those who do not ski or snowboard. Good places to eat, active nightlife, shopping, arts and other winter sport activities, attractions, and events have become an increasingly important component of the overall winter vacation product mix.

Specific motivations for spring and fall season travel are less centralized than summer or winter travel. Additional research should be focused around travel motivations for these time periods. Currently, Explore Whitefish has focused its marketing efforts around extending the summer season—Summer Plus (building early autumn visitation), Secret Season (building late spring visitation), and growing winter visitation during select periods of time with historically lower business levels. Central to this effort is to communicate specific reasons for travel in these time periods, including visitation to Glacier National Park. This means communicating activities, features, and events worth experiencing during these time periods that cannot be experienced at other times of the year and are unique to our area

1.6 THE TRAVEL DECISION FUNNEL: INSPIRATION, ORIENTATION, FACILITATION

The overall vision for Whitefish is to have integrated communication throughout the travel planning funnel:

INSPIRATION > ORIENTATION > FACILITATION

Inspiration. At the highest levels of communication, Explore Whitefish leverages the Montana branding guidelines in its selection of imagery and video and development of creative marketing content, while applying its own Whitefish spin on things. We want to foster an emotional connection with this combination of imagery, video, and creative content so that the viewer will move forward with the primary call, which is to visit ExploreWhitefish.com.

Tools:

- ExploreWhitefish.com
- Explore Whitefish Social Media Channels (Facebook and Instagram)
- Earned media features
- Targeted content and search marketing
- Sponsored content in targeting and retargeting campaigns
- Seasonal content in consumer newsletters
- Partner websites such as: glaciermt.com, visitmt.com, and skiwhitefish.com

Orientation. Orientation to new opportunities is administered through interactive maps within the Explore Whitefish website, as well as companion maps within the Travel Guide and a printed town map available for visitors at kiosks and visitor centers. All maps have a consistent look between them. Depending on the method of communication, the location of Whitefish within the state, or its proximity to other points of interest in the region is detailed.

Tools:

- ExploreWhitefish.com and interactive map
- Seasonal itineraries and activity specific content created for ExploreWhitefish.com and used for paid advertising, social media, and consumer newsletters
- Event calendar at ExploreWhitefish.com/events
- Whitefish Town Map and Whitefish Travel Guide

Facilitation. Facilitation (connecting users with stakeholder businesses) is achieved by empowering individual businesses with the capacity to create and maintain business information, specials, packages, video and events that are displayed at ExploreWhitefish.com. The travel guide and locator maps are made available at local visitor information kiosks, visitor information centers and business locations throughout the town.

Tools:

- Self service visitor information kiosks with free wifi
- Seasonal itineraries and activity specific content with business links on ExploreWhitefish.com
- “Book Now” buttons for lodging reservations on ExploreWhitefish.com
- “Reserve Now” buttons for restaurants and activities on ExploreWhitefish.com
- Whitefish Town Map and Whitefish Travel Guide
- Year-round walk-in Visitor Information Center

1.7 KEY MARKETS FOR WHITEFISH, MONTANA

Our potential visitors are targeted by geographic location, demographic characteristics, and values that distinguish our overall potential visitor as a “high potential visitor” and “winter enthusiast” (as defined by research conducted by Destination Analysts) and our niche visitor as a “geotraveler” (as defined by research conducted by ITRR, the Travel Industry Association of America (TIA) and the National Geographic Society). The following section provides information on the distinguishing characteristics of potential visitors defined by MOTBD along with the core geographic markets for Whitefish.

HIGH POTENTIAL VISITORS FOR MONTANA

The Montana Office of Tourism and Business Development (MOTBD) engaged in a destination brand research study with Destination Analysts in which the characteristics of the most desirable visitors to Montana were defined. The “High Potential Visitor” profile aligns with the demographics and psychographics of the geotraveler that Explore Whitefish has been marketing to and has had significant success.

MONTANA'S HIGH POTENTIAL VISITOR CHARACTERISTICS

Source: Destination Analysts, Montana Destination Brand Research, 2016

- 60% have HHI (Household Income) above \$80,000
- 54% Male, 46% Female
- 68% have college degrees or above
- Average age: 36.4 years old
- Expected Days Spent in Montana: 8.1
- Expected Total Expenditures in Montana: \$1,887
- Frequent travelers who live in urban areas yet are outdoor-oriented travelers and heavy consumers of recreational activities

WINTER ENTHUSIASTS FOR MONTANA

The Montana Office of Tourism and Business Development (MOTBD) engaged in a destination research study with Destination Analysts in which the characteristics of the most desirable visitors to Montana during the winter season were defined. The "Winter Enthusiasts" profile aligns with the demographics and psychographics of the geotraveler that Explore Whitefish has been marketing to and has had significant success.

WINTER ENTHUSIASTS INTERESTED IN TRAVELING TO MONTANA FOR WINTER RECREATION

Source: Destination Analysts, Montana Profile & Study of the Winter Enthusiast, 2018

- Average Annual HHI (Household Income): \$80,991
- 54% Male, 46% Female
- 61.5% have college degrees or above
- Average age: 39.7 years old
- 75% typically travel for winter recreation with spouse or significant other as travel party
- Spending on 4 day/3 night winter recreation trip: \$3,071
- Three attributes for selecting winter recreation destinations: superior snow quality, outdoor activities other than skiing, exciting atmosphere.
- 46.8% are familiar with Montana as a place for winter recreation
- Months most likely to visit Montana for winter trip: January (16%), February (39.5%), December (38.4%)

WHITEFISH NICHE VISITOR: GEOTRAVELERS

Geotourism is defined as tourism that sustains or enhances the geographic character of the place being visited including its environment, culture, heritage, landmarks and the well-being of its residents. According to the ITRR study, "Statewide Vacationers to Montana: Are They Geotravelers," the strong geotraveler spent the most money per day while traveling in Montana (\$141.79) followed by the moderate geotraveler (\$134.10) and the non geotraveler vacationer spent (\$133.27). Visitors who agreed with the principles of geotourism spend more money per day while traveling in Montana than non- geotravelers. A 2016 ITRR Study, "The Importance of Traveler Spending on Locally Produced Goods & Services," further examined geotraveler spending. The results of this study showed that visitor groups who purchased "Made in Montana " products, items from local farmers' markets, and who used local guides and outfitters spent \$184.76 more per stay than visitors who did not purchase these products and services.

Geotravelers are low impact, high value visitors who appreciate the unique characteristics and natural values of the places they visit. They place a high value on authentic travel experiences that respect and support the local character of place and its environment, and are less likely to become discouraged in their travel experiences by travel distances, difficulties and variable weather, especially during the shoulder seasons.

Values – Creative, curious, connected, engaged, adventurous, independent, mindful.

Source: Geotraveler Exploratory, Alexis Sanford, 2008.

Attitudes – Immerse yourself in the culture, go off the beaten trail, get out of your comfort zone, allow

for spontaneity, take a risk, pay attention, go now.

Source: Geotraveler Exploratory, Alexis Sanford, 2008.

- A segment of the U.S. total travel market estimated to include over 55 million people.
- They seek authenticity in travel experiences.
- They seek out opportunities to experience businesses and activities that are locally unique.
- Travel is an important part of their “lifestyle” and they often combine learning with travel.
- They spent a disproportionate amount of their income on travel compared to other travelers.
- They are more likely to be aware of their own impact, both environmental and community, on the places they are visiting.

NON-RESIDENT WHITEFISH VISITOR CHARACTERISTICS

Source: 2020 ITRR Non-Resident Visitor Study

- 86% visited Glacier National Park (95% in 2019)
- 47% traveled as a pair (2 persons)
- Average group size was 2.38
- 78% have HHI (Household Income) above \$75,000 (67% in 2019)
- 57% Male, 43% Female
- 22% were first time visitors (down from 29% in 2019)
- 76% plan to return within 2 years
- Average age of visitor was 55 years old
- Average length of stay in Montana was 7.28 nights (up from 6.06 nights in 2019)

NON-RESIDENT WHITEFISH VISITOR AGE GROUPS REPRESENTED

Source: 2020 ITRR Non-Resident Visitor Study. The total response percentage exceeds 100% because the question allowed for multiple choices thus the total number of answer choices selected were greater than the number of respondents

- 25% Under 18 years old (27% in 2019)
- 6% 18-24 years old (7% in 2019)
- 15% 25-34 years old (27% in 2019)
- 15% 35-44 years old (19% in 2019)
- 17% 45-54 years old (17% in 2019)
- 48% 55-64 years old (35% in 2019)
- 25% 65-74 years old (27% in 2019)
- 8% 75 and older (8% in 2019)

TOP FIVE NON-RESIDENT VISITORS TO WHITEFISH ACTIVITIES WHILE IN MONTANA

Source: 2020 ITRR Non-Resident Visitor Study

- 70% Day hiking
- 67% Scenic Driving
- 46% Recreational shopping
- 42% Wildlife watching
- 34% Car / RV camping (up from 20% in 2019)
- 33% Visit local brewery

WHERE NON-RESIDENT VISITORS TO WHITEFISH PRIMARILY COME FROM

Source: 2020 ITRR Non-Resident Visitor Study

- 21% Washington (3% in 2019)
- 11% California (6% in 2019)

- 6% Illinois (4% in 2019)
- 6% Utah (2% in 2019)
- 6% Wisconsin 2% in 2019)
- 5% Colorado (3% in 2019)
- 5% Texas (6% in 2019)
- 1% *Alberta (8% in 2019)*
- 39% Everywhere else in the U.S. and the world (without any regular pattern)

WHITEFISH 2019 VISITOR EXPENDITURES BY METROPOLITAN STATISTICAL AREA (MSA): **\$71.2 Million**

Source: VisaVue and other sources, Expenditures include Montana residents who reside outside of the Whitefish 59937 Zip Code

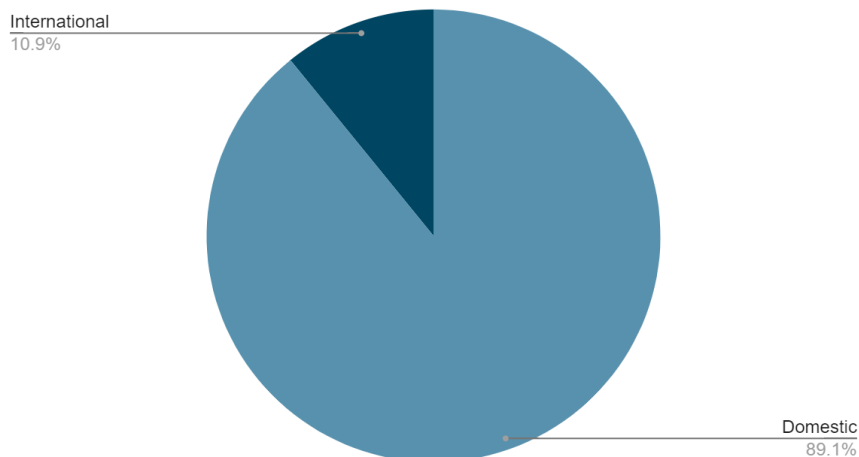
- 4.3% Seattle (State of Washington 14%)
- 3.5% Los Angeles (State of California 17%)
- 2.7% San Francisco
- 2.6% Missoula, MT
- 1.9% Portland, OR

WHITEFISH 2019 INTERNATIONAL VISITOR EXPENDITURES: **\$7.7 Million**

Source: VisaVue and other sources

- 92% Canada (92% in 2018)
- 2% United Kingdom (2% in 2018)
- 2% Australia (2% in 2018)
- 0.6% Germany (1% in 2018)
- 0.5% France (0.5% in 2018)

2019 Whitefish Visitor Expenditures: \$71.2M



Source: VisaVue and other sources, Expenditures include Montana residents who reside outside of the Whitefish 59937 Zip Code

WHITEFISH 2020 VISITOR EXPENDITURES BY MSA: **\$72.3 Million**

Source: VisaVue and other sources, Expenditures include Montana residents who reside outside of the Whitefish 59937 Zip Code

2020 QUARTER 1 (JANUARY - MARCH) BY MSA: **\$14.9 Million**

- 5.3% Seattle
- 3% Missoula, MT
- 2.1% Los Angeles
- 2% Portland, OR
- 1.9% San Francisco

2020 QUARTER 2 (APRIL - JUNE) BY MSA: \$10 Million

- 3.8% Seattle
- 3.5% Los Angeles
- 2.7% San Francisco
- 2.5% Missoula, MT
- 2.2% Phoenix

2020 QUARTER 3 (JULY - SEPTEMBER) BY MSA: \$30.7 Million

- 6.1% Seattle
- 4.7% Los Angeles
- 4% San Francisco
- 2.4% Phoenix
- 2.4% Dallas

2020 QUARTER 4 (OCTOBER - DECEMBER) BY MSA: \$30.7 Million

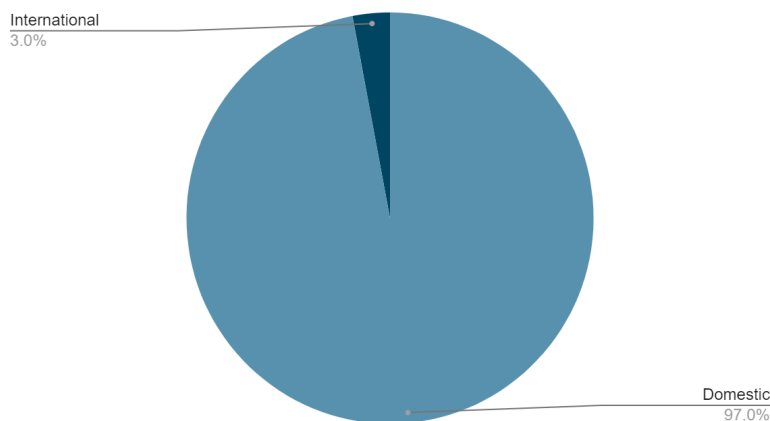
- 3.7% Los Angeles
- 3.6% Seattle
- 3.1% San Francisco
- 2% Missoula, MT
- 1.7% Portland, OR

WHITEFISH 2020 INTERNATIONAL VISITOR EXPENDITURES: \$2.2 Million

Source: VisaVue and other sources

- 2020 Quarter 1 (January - March): -9.8% compared to 2019 (Canada -9.6%)
- 2020 Quarter 2 (April - June): -91.5% compared to 2019 (Canada -91.8%)
- 2020 Quarter 3 (July - September): -93.4% compared to 2019 (Canada -93.9%)
- 2020 Quarter 4 (October - December): -91.2% compared to 2019 (Canada -91.7%)

2020 Whitefish Nonresident Expenditures: \$74.5M



Source: VisaVue and other sources, Expenditures include Montana residents who reside outside of the Whitefish 59937 Zip Code

CORE GEOGRAPHIC MARKETS FOR FOCUS

Explore Whitefish will focus its attention during this fiscal period on low impact, high value potential visitors who match the geotraveler profile in the following geographic markets. It is possible that opportunities will arise in additional markets in partnership with other tourism organizations, such as the Montana Office of Tourism and Business Development. In these instances, Explore Whitefish may extend its efforts beyond these core focus markets.

- **Seattle, Washington (Puget Sound Area)** – Seattle and the Puget Sound area have been historically strong

markets for Whitefish. The existence of the Amtrak train route has made this connection logical, as well as daily direct flights. Explore Whitefish invests in print, digital, and out of home campaigns in this market as well as actively cooperating with Whitefish Mountain Resort (WMR) on multi-channel marketing campaigns. During 2020, approximately 21% of visitors surveyed who spent at least one night in Whitefish originated in the state of Washington.

- **Portland, Oregon** – The existence of the Amtrak train route has made this connection logical, as well as seasonal direct flights and short connecting flights the rest of the year. Explore Whitefish invests in print, digital, and out of home campaigns in this market as well as actively cooperating with Whitefish Mountain Resort (WMR) on multi-channel marketing campaigns. During 2020, approximately 4% of visitors surveyed who spent at least one night in Whitefish originated in the state of Oregon.
- **Chicagoland (Chicago core and northern suburbs to Madison, Wisconsin)** – During FY20, Explore Whitefish engaged in its sixth consecutive comprehensive cooperative marketing campaign with Whitefish Mountain Resort in the Chicago market with many years of assistance of MOTBD. There is currently a weekly winter seasonal direct flight from Chicago O'Hare (ORD) to Glacier Park International Airport (GPIA). Daily direct flights are also available during the holiday season. A significant expansion of seats for warm season service have also been added in recent years as well as multiple carriers now flying this route daily direct seasonally. During 2020, approximately 6% of visitors surveyed who spent at least one night in Whitefish originated in the state of Illinois.
- **Minneapolis, Minnesota** – This has been a historically strong market for Whitefish in terms of visitation and ease of travel due to daily direct flights and Amtrak service. During FY22, Explore Whitefish will increase investment in this market in order to continue building awareness of Whitefish as a premier travel destination. During 2020, approximately 3% of visitors surveyed who spent at least one night in Whitefish originated in the state of Minnesota.
- **California (San Francisco/Oakland & Los Angeles)** – Although California consistently ranks as a top market of visitors to Whitefish, the addition of enhanced direct air service has made California a core geographic market for Explore Whitefish. Daily direct service during the warm season of 2017 was added for San Francisco and daily direct seasonal service for Los Angeles began in the spring of 2018. As of 2019, multiple carriers will be flying to Los Angeles with seasonal daily direct flights. During 2020, approximately 11% of visitors surveyed who spent at least one night in Whitefish originated in the state of California.
- **Regional Drive-To (including Spokane, Coeur D'Alene, British Columbia)** – Explore Whitefish invests in regional drive-to markets as these potential visitors have the ability to travel on short notice, particularly during the shoulder seasons. Although the amount of investment is significantly smaller than the aforementioned core geographic markets, we believe it is important to continue to raise awareness and intent to travel in these regional drive-to markets.

ESTABLISHED GEOGRAPHIC MARKET

Explore Whitefish has identified the following established geographic market due to current and historic visitation numbers, as well as historical investment in marketing. Although this market is very important from a visitation perspective, Explore Whitefish is currently choosing to invest in the core geographic markets identified above as having the largest potential for growth.

- **Alberta** – Alberta has been a historically strong market for Whitefish. Awareness of Whitefish as a premier travel destination has been well established and the fluctuations in currency exchange play the single biggest factor in increased or decreased visitation and expenditures to Whitefish. During 2020, due to pandemic travel restrictions, approximately 1% of visitors surveyed who spent at least one night in Whitefish originated in the province of Alberta. In 2019, this number was 8%.
- **Missoula, MT** – Missoula has been a historically strong market for Whitefish in terms of visitation and ease of travel due to proximity to Whitefish. The ability to make short shoulder season trips and last minute trips makes this market desirable. Explore Whitefish will pursue the possibility of using only private funds for specific, targeted marketing opportunities.

1.8 MARKETING PLAN GOALS

In light of the Whitefish Sustainable Tourism Management Plan (STMP), Explore Whitefish has segmented our FY22 Marketing Plan Goals into two categories: traditional marketing plan goals and destination stewardship goals.

TRADITIONAL MARKETING PLAN GOALS

- Support the brand identity and presence of Whitefish, Montana in the marketplace as a destination for active experience-seeking travelers.
- Encourage destination visitation from the core geographic markets.
- Aggressively showcase varied winter vacation experiences in and around Whitefish and Glacier National Park.
- Position special events messaging to enhance visitation during the “Secret Season” of May-June, and the “Summer Plus” season of September-October while still leading with the primary reasons for travel to Whitefish: spectacular unspoiled nature, recreational activities, and a charming and vibrant mountain town.
- Position Whitefish as the basecamp for Glacier National Park visitors with the natural, cultural, and culinary assets of Whitefish.
- Improve “Secret Season” visitation by promoting bicycling, wildlife viewing, birding, fly fishing, golf, water sports, horseback riding, performing arts, culinary experiences, and community events.
- Improve “Summer Plus” visitation by promoting fall foliage, wildlife viewing, hiking, birding, golf, fly fishing, bicycling, non-motorized water sports, horseback riding, performing arts, culinary experiences, and community events.
- Stimulate the publication of feature stories in national and regional publications, digital media, and broadcast media.
- Encourage ski groups and incentive travel to improve the meeting and convention market with emphasis on Fall, Winter and Spring.
- In partnership with Glacier AERO and Glacier Park International Airport (GPIA), work to maintain current air service and help to facilitate new and expanded fall, winter, and spring markets to improve access, ease, and affordability of travel.
- Collaborate with Glacier National Park and regional and state tourism partners to develop and build out support for shoulder season visitation.

DESTINATION STEWARDSHIP GOALS

Focus on implementation of the Whitefish Sustainable Tourism Management Plan (STMP) and integration into the Whitefish Brand

- Co-lead the implementation of a Whitefish Sustainable Tourism Management Plan (STMP) in conjunction with the Whitefish STMP Committee and City of Whitefish.
- Take the lead on outreach segments of the STMP to build awareness and influence visitor behavior, with particular focus on the peak summer season.
- Integrate elements of the STMP into the Whitefish Brand. Develop messaging specific to these new elements.
- Encouraging alternative modes of transportation such as bicycle and pedestrian paths and expansion of public transportation.
- Conduct the annual Explore Whitefish Grant Program with preference given to grant projects which support the key pillars of the STMP: Community Character, Livability, and Community Engagement.
- Pitch media coverage to include topics such as recreating responsibly, leave no trace, traveling safety around wildlife, wildfire mitigation, etc.
- Collaborate with Glacier National Park and regional and state tourism partners to communicate with visitors during peak season.

1.9 COOPERATIVE MARKETING OPPORTUNITIES

MOTBD COOPERATIVE MARKETING

Explore Whitefish has actively participated in the past and anticipates participating in the future in a variety of cooperative marketing programs with the Montana Office of Tourism and Business Development (MOTBD). Explore Whitefish participation in MOTBD marketing programs in the past have primarily centered around spring, fall, or winter campaigns. Winter MOTBD cooperative campaigns that focused on the destination ski market have been of particular interest to Explore Whitefish. Spring and autumn cooperative campaigns that are focused on the active outdoors traveler within our core geographic markets have also been of particular interest. In FY22, Explore Whitefish will consider cooperative opportunities and research cooperative opportunities which align with our budget, timing, and marketing goals.

PAST COOPERATIVE MARKETING EFFORTS (SUCCESSFUL AND NOT SUCCESSFUL, WHY?)

Explore Whitefish has engaged in many cooperative marketing initiatives with the Montana Office of Tourism and Business Development (MOTBD) in the past. We have made adjustments to future participation based on previous tracking and we have found the most success in MOTBD cooperative efforts that are aligned with our primary seasonal and geographic targets, particularly winter. The research cooperative opportunities offered by MOTBD, including VisaVue and AirDNA, have been invaluable in helping us to measure visitor spending to Whitefish, particularly within our stated target markets, as well as to closely monitor our seasonal trends and the effects of short term rentals.

OTHER COOPERATIVE MARKETING EFFORTS

Explore Whitefish actively cooperates with Whitefish Mountain Resort (WMR) on multi-channel marketing campaigns in key target markets including, but not limited to, Seattle, Portland, and Chicago. Explore Whitefish also cooperates locally with Glacier AERO (Airline Enhancement and Retention Outreach), WMR, and Discover Kalispell to promote inbound travel on new and expanded air service to Glacier Park International Airport.

Explore Whitefish partners with Glacier Country Regional Tourism including cooperative media events, special events, press trips, FAM trips, groups marketing, and crisis management planning.

2 BUDGET OVERVIEW

2.1 PROVIDE A BUDGET AMOUNT FOR ADMINISTRATION, EACH MARKETING SEGMENT, AND EACH SEGMENT'S METHOD WHEN PROVIDING OVERALL BUDGET

FY22 PUBLIC BUDGET PROJECTIONS DURING COVID-19

Explore Whitefish begins our budget process for the upcoming fiscal year during early January with initial approval by the Board of Directors in early March. During the very end of this budgeting process for FY21, the impacts of COVID-19 forced us to begin to reevaluate our budgets. As the effects of the pandemic on travel and tourism will continue into FY22, we have taken a similar approach.

These projections are difficult due to the fluid nature of the current situation without knowing how long it will be until the travel industry returns to pre pandemic levels. We have utilized projections from the Montana Office of Tourism and Business Development (MOTBD), advanced lodging booking data, national travel data from Destination Analysts, and other sources as baselines to create the following budget projection. As we monitor collections closely, we may need to adjust these projections.

FY21 vs. FY22 Public Budget Projections

FY21

- Initial FY21 Public Budget: \$156,000
- REVISED Projected FY21 Public Budget: \$78,000 (50% of the original projection)
- Current FY21 Public Budget: \$115,000 (75% of the original projection)

FY22

- Projected FY22 Public Budget: \$126,905
 - -20% of initial FY21 budget projection
 - +10% of current FY21 budget
 - -15% of initial FY20 budget projection

While these projections are cautiously optimistic, Explore Whitefish works closely with our board of directors and finance committee to evaluate collections and expenditures on a monthly basis. If bed tax revenues do not meet projected collections, the following budget line items from the FY22 Public Budget will be adjusted.

- Online & Digital Advertising

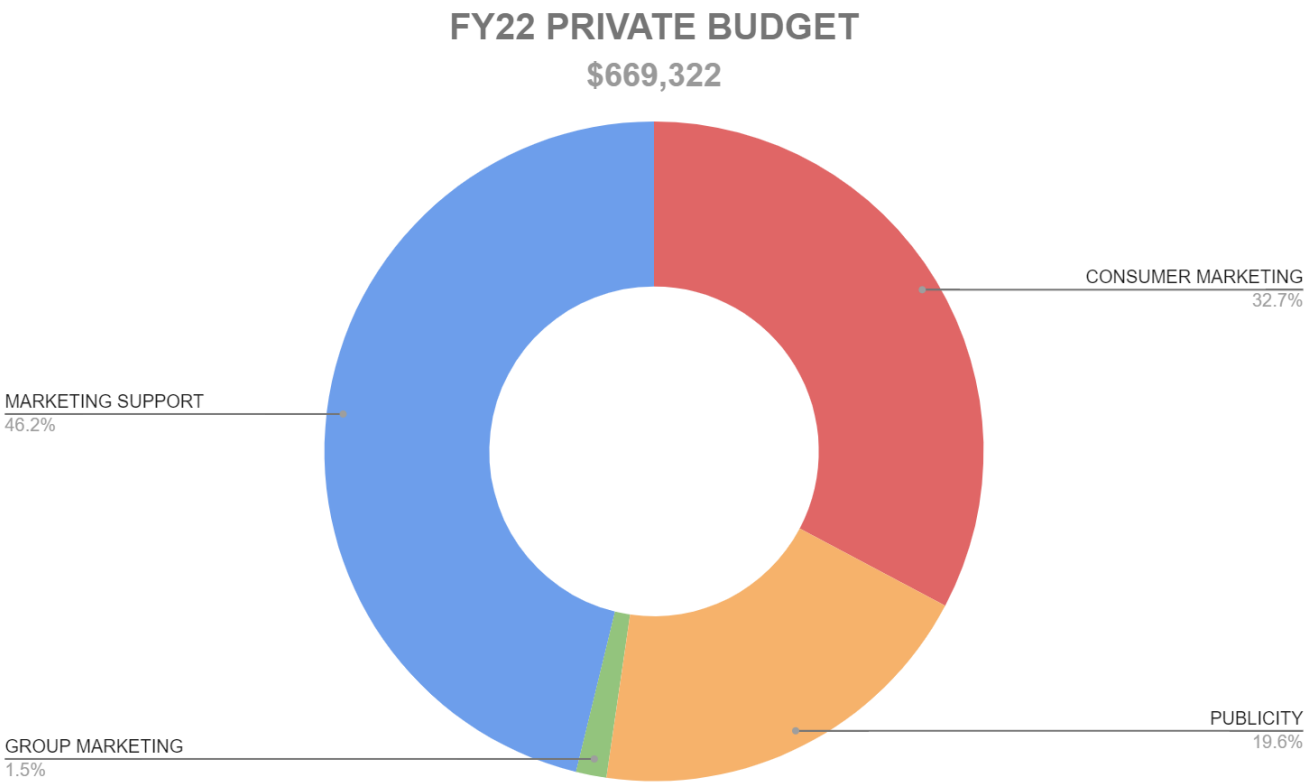
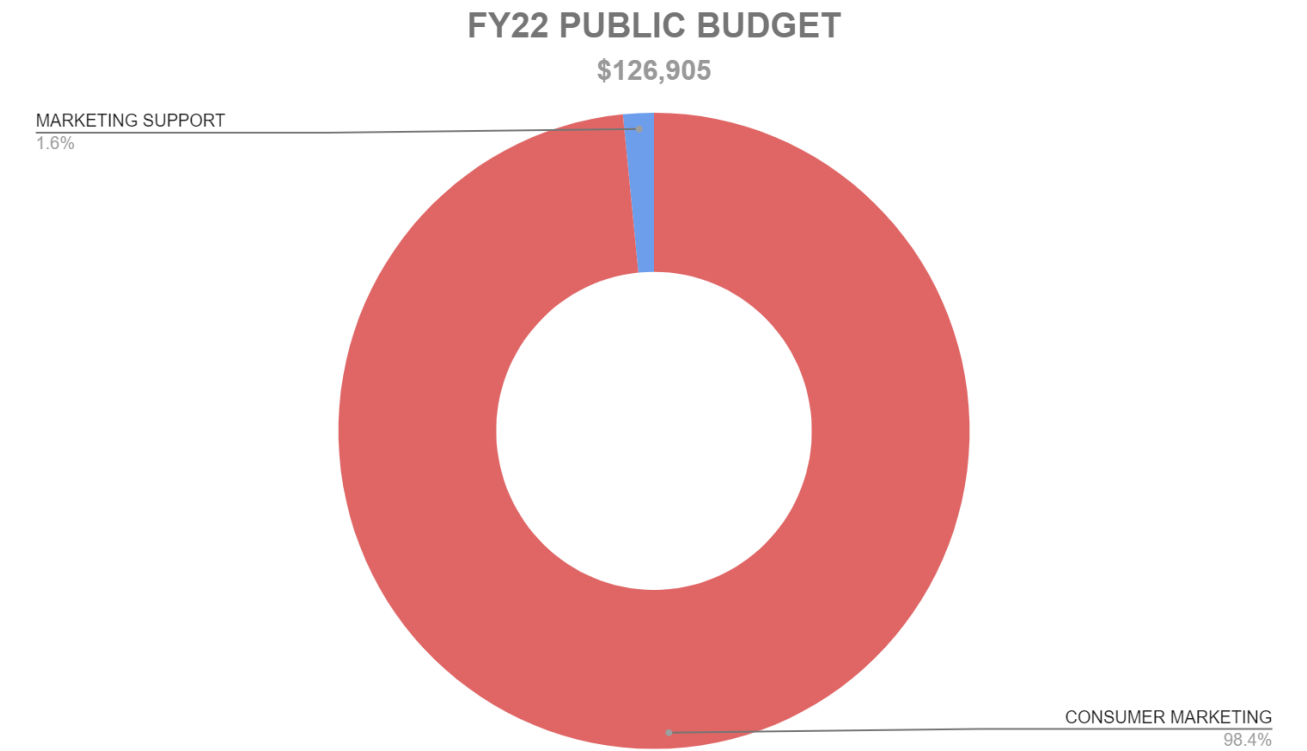
FY22 PUBLIC & PRIVATE BUDGET BUDGET SECTION 1	PUBLIC BED TAX BUDGET	PRIVATE MEMBER BUDGET	TOTAL COMBINED BUDGET
MARKETING SEGMENT: CONSUMER	\$124,905	\$219,200	\$344,105
CREATIVE SERVICES		\$103,500	\$103,500
E-NEWSLETTER		\$2,050	\$2,050
FACILITATION COLLATERAL		\$26,500	\$26,500
ONLINE & DIGITAL ADVERTISING**	\$119,905	\$5,000	\$124,905
OUT OF HOME			\$0
PHOTOGRAPHY & VIDEO	\$5,000	\$21,000	\$26,000
PRINT ADVERTISING			\$0
PROMOTIONS		\$8,000	\$8,000
SOCIAL MEDIA		\$6,000	\$6,000
VISITOR INFORMATION SERVICES		\$15,150	\$15,150
WEBSITE		\$32,000	\$32,000

FY22 PUBLIC & PRIVATE BUDGET BUDGET SECTION 2	PUBLIC BED TAX BUDGET	PRIVATE MEMBER BUDGET	TOTAL COMBINED BUDGET
MARKETING SEGMENT: PUBLICITY		\$130,900	\$130,900
MARKETING SEGMENT: GROUP MARKETING		\$10,000	\$10,000
MARKETING SEGMENT: MARKETING SUPPORT	\$2,000	\$309,222	\$311,222
ADMINISTRATION*		\$164,948	\$164,948
CRISIS MANAGEMENT		\$30,000	\$30,000
MARKETING PERSONNEL		\$45,263	\$45,263
OPPORTUNITY MARKETING	\$50	\$3,011	\$3,061
RESEARCH		\$20,000	\$20,000
TAC & GOVERNOR'S CONFERENCE MEETINGS	\$1,950		\$1,950
TOURISM OUTREACH & SUPPORT		46,000	\$46,000
BUDGET TOTALS	\$126,905	\$669,322	\$796,227

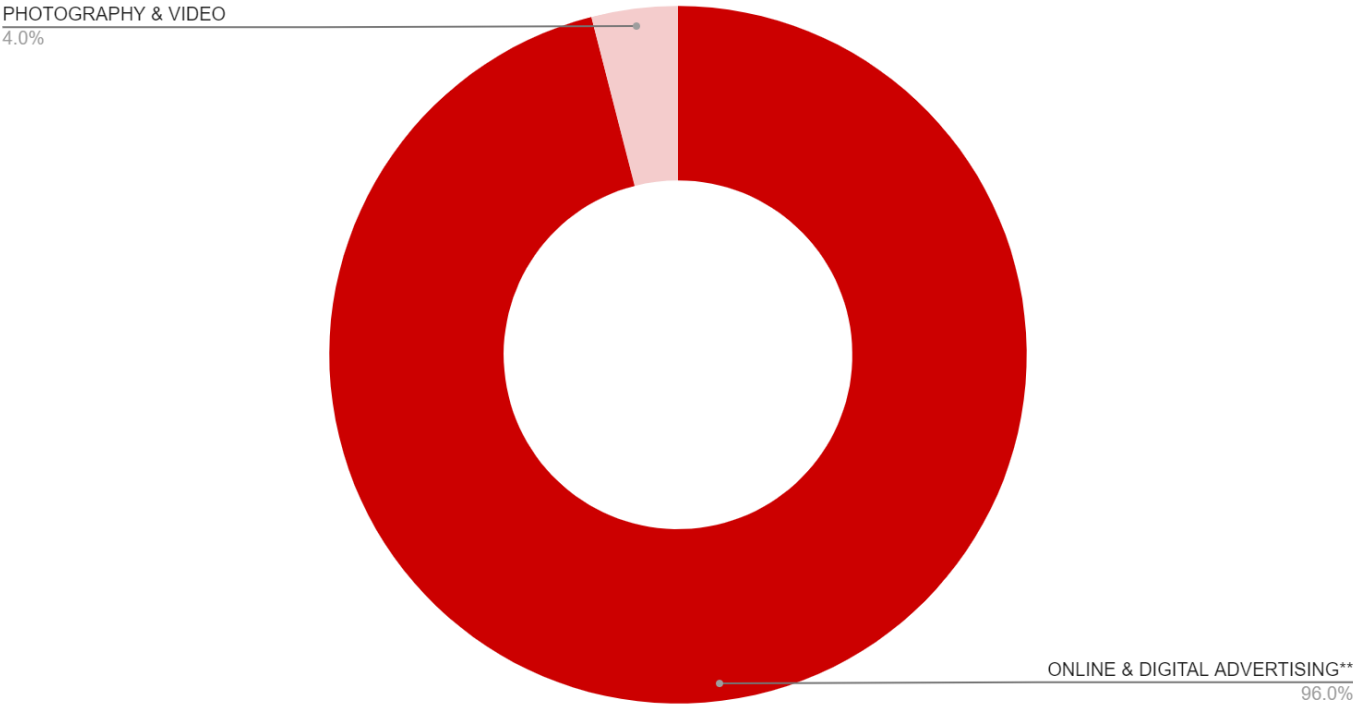
*Administration budget includes office expenses, insurance, supplies, utilities, hardware, software, director wages

** Budget line items to be adjusted if revenues do not meet projected collections

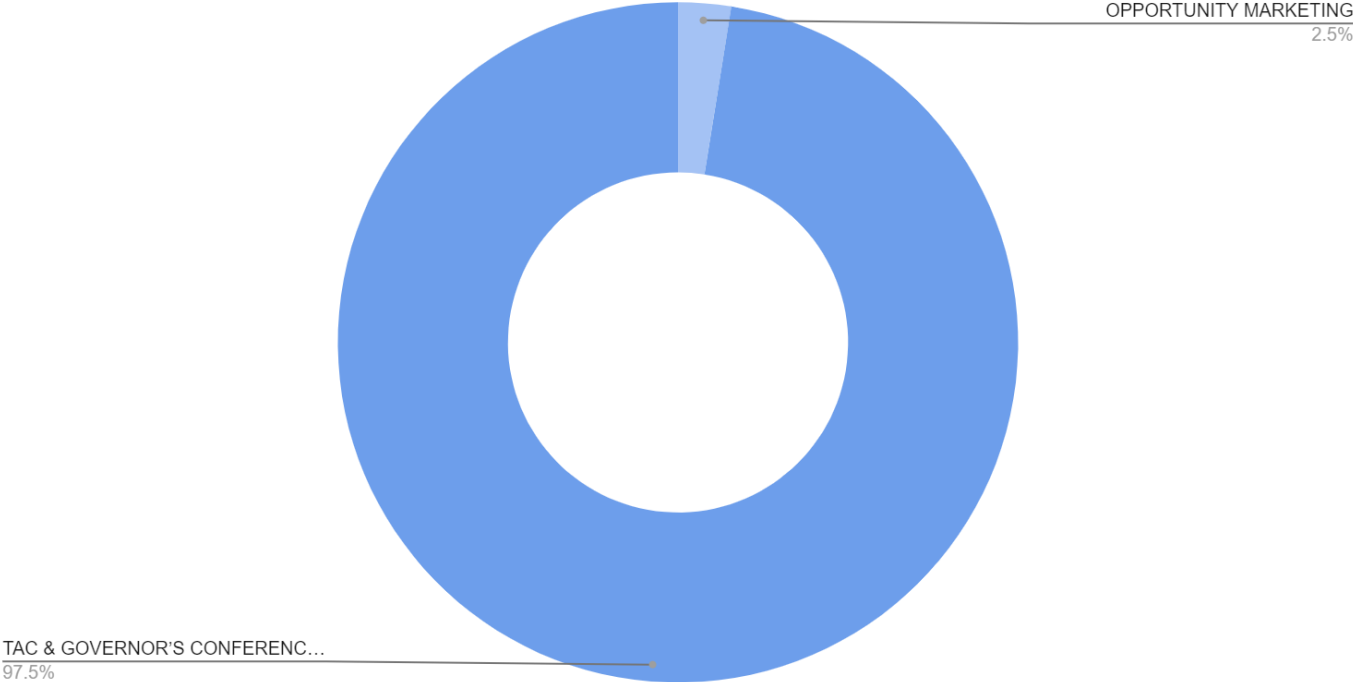
2.2 USE A PIE CHART TO ILLUSTRATE WHAT PERCENTAGE OF YOUR BUDGET IS BEING USED IN EACH MARKETING SEGMENT AND METHOD.



PUBLIC FUNDS: CONSUMER MARKETING
\$124,905



PUBLIC FUNDS: MARKETING SUPPORT
\$2,000



3 MARKETING SEGMENTS & MARKETING METHODS

Whitefish follows the basic travel decision funnel:

- **Inspiration** – Sparking an interest and inspiring a traveler to visit Whitefish
- **Orientation** – Helping the visitor learn about where Whitefish is, how to get here, what facilities and activities are available for their travel
- **Facilitation** – Helping to connect visitors with specific businesses and activities to make a reservation and solidify their travel plans into a quality experience once here

All marketing efforts feed into this funnel and resolve to digital tools, travel guides and a visitor information telephone line that help connect visitors from spark of inspiration to actual business transactions at the local level. These tools include the website at ExploreWhitefish.com, the Whitefish Travel Guide, social media channels, visitor information kiosks, and wayfinding maps throughout town. These tools are important to help connect visitors with local business as well as help visitors have a great experience once they are here. If we inspired a visit, did nothing for the visitor once they arrived, and were reluctant to provide tools that help the visitor discover what to do, the visitor would be more likely to miss the quality experiences that would cause them to want to return. Explore Whitefish will undertake initiatives and activities in the following key areas during FY22.

3.1 MARKETING SEGMENT: CONSUMER

STRATEGY FOR CONSUMER

Our consumer advertising is based around visitation in our shoulder seasons and our strategy is broken out into the following three categories: Summer Plus, Winter, and Secret Season. The consumer advertising budget for each strategy is allocated to the seasonal media buying plan. Opportunity Marketing funds are left open as a contingency for reactive media buys throughout the season. An emerging niche recreation market is also discussed below as well as the Explore Whitefish strategy for visitor fulfillment.

We advertise in our stated target markets as well as nationally through cooperative opportunities with the Montana Office of Tourism and Business Development. In FY22, online and digital advertising will comprise 100% of our consumer advertising budget. While we have strategically been moving more funds toward online and digital advertising over the past few years, the last year has seen the largest shift. While the pandemic certainly has played a role in this (i.e. meeting potential future travelers where they most likely are - at home and on devices versus out of home placement in train stations and airports), the enhanced ability to track the effectiveness of our advertising campaigns to inspire actionable visits to ExploreWhitefish.com is the foundation for this shift in media buying strategy.

During FY22, our online and digital advertising will be broken out into digital placement, media partnerships, and video/audio streaming services. Examples of each type of placement can be found below:

Digital placement: Search, Explore Whitefish video and custom website content featured on our owned paid channels such as Facebook, Instagram, and YouTube.

Media partnerships: Custom video, editorial, and email newsletters with Teton Gravity Research/Whitefish Mountain Resort and Outside Magazine

Video/audio streaming services: Spotify

Destination Analysts recently asked respondents which marketing channels they were most receptive to learning about new destinations to visit. Many of the channels utilized in the FY22 Explore Whitefish online/digital media strategy ranked in the top ten. This includes:

- Websites found via search engine (#1: 35.8%)
- Email (#2: 25.1%)
- Streaming video services such as YouTube, Hulu, etc. (#4: 23.3%)
- Online content such as articles and blogs (#6: 22.1%)
- Facebook (#7: 22.1%)

- Instagram (#9: 16.2%)

(The State of the American Traveler: Destinations Edition: January 2021)

The 2019 Whitefish Campaign Survey also helped us to measure the effectiveness of our seasonal online/digital ad campaigns. Over one third of respondents to the online survey of potential visitors felt that the ads fit them and their interests. In addition, 16% said they were likely to investigate further about Whitefish after seeing these ads. Considering this was a broad survey of potential visitors in the western United States, this is very encouraging.

Explore Whitefish continues to utilize local and regional data as success indicators for the activities of Explore Whitefish as well as the foundation for our marketing strategies based upon historic and current seasonal trends in our local economy.

SUCCESS INDICATORS

- Resort Tax Collections
- Lodging Tax Collections
- Lodging Occupancy Report
- Nonresident Visitor Expenditures
- Glacier National Park Recreational Visits
- Whitefish Mountain Resort Visits

Explore Whitefish has recently adopted a customer-intent based strategy in order to monitor success indicators happening on the Explore Whitefish website. Rather than using upper-funnel signals like website visits to measure success, Explore Whitefish will now leverage bottom of the funnel signals of customer-intent to track indicators of success on the website such as clicks to book. Actions such as these are a better indicator that a website visitor is coming, or is strongly considering coming, to Whitefish than someone simply landing on the Explore Whitefish homepage. As we collect more of this data, season over season and year over year growth will be tracked, and our goal is to grow the volume of these high intent consumer actions over time. Specifically, we will be tracking and growing the following success measures.

DIGITAL ADVERTISING SUCCESS MEASURES

As 2020 can be seen as an atypical year, success measures are compared to the performance of both the FY20 (2019-20) and FY21 (2020-21) seasonal campaigns, as applicable.

- Ad click through rates
- Ad cost per click
- Views and impressions for video and streaming ads

WEBSITE SUCCESS MEASURES

As 2020 can be seen as an atypical year, success measures are compared to the performance of both the FY20 (2019-20) and FY21 (2020-21) seasonal campaigns, as applicable.

- Clicks to book
- Clicks to reserve (restaurant)
- Clicks off to stakeholder websites
- Newsletter sign-ups
- Travel guide downloads
- Traffic volume from targeted markets
- Visitor quality measures
 - Bounce rate
 - Length of time spent on site
 - Number of pages viewed

A. Summer Plus: Occupancy history in Whitefish shows that during the period of late June through August the town is at its busiest. From late August into early September, occupancy levels are still strong, but begin to wane. The objective is to extend the peak summer season and grow occupancy and business levels in the autumn for the time period of September to the end of October. The approach for this time period is to develop and communicate narratives for adventures, activities, fall events, and specific reasons for visiting Whitefish during this time period that cannot be experienced if Whitefish were visited during another time of year. As we continue to position Whitefish as the basecamp of Glacier National Park, the narrative will lead with fall experiences in Glacier National Park such as scenic driving, fall foliage, wildlife watching, and hiking. Explore Whitefish has allocated 20% of its overall consumer advertising budgets to Summer Plus marketing efforts.

DEMOGRAPHICS

The target audience for this time period are those 35 and older with a household income (HHI) over \$75,000 whose travel or vacation is not restricted by an academic calendar.

PSYCHOGRAPHICS

Travelers seeking active experiences such as scenic driving, wildlife viewing, hiking, birding, golf, fly-fishing, road and mountain biking, non-motorized water sports, horseback riding, paddling, and hiking. Cultural and culinary experiences such as dining, shopping at local shops, attending performing arts, and community events are also considered primary autumn activities for Whitefish. This includes traveling to Whitefish primarily for the purpose of relaxing, strolling the streets and shops and trying out great dining and nightlife options.

GEOGRAPHIC AUDIENCE

Seattle, Portland, Chicagoland, Minneapolis, California, Regional Drive-To

SUPPORTING RESEARCH & STATISTICS

Seattle and the Puget Sound area have been historically strong core markets for Whitefish. Portland is also identified as a core market as we have increased investment in the past few years. The existence of the Amtrak train route has made this connection logical and a seasonal direct flight on Alaska Air/Horizon has increased the possibilities of this market. Daily direct service to Minneapolis coupled with seasonal expanded direct air service to Chicago and California creates more opportunity for growth in these markets.

Not all visitors are alike. The same is true of their economic impact. Research by ITRR indicates that nonresidents who travel to the state via air spend more money per day and stay longer than the average nonresident traveler group.

- **Average Nonresident Travelers:** The statewide average 2019 nonresident traveler group to Montana (2.19 people) spent an average of \$152.54 per day. With an average length of stay of 4.32 nights, this equates to a total trip expenditure of approximately \$659.
- **Fly-in Nonresident Travelers:** The statewide average 2019 fly-in nonresident traveler group arriving in Montana (2.1 people) spent an average of \$251.54 per day. With an average length of stay of 6.24 nights, this equates to a total trip expenditure of approximately \$1,570.
- **Difference:** \$911 in additional spending per fly-in statewide nonresident travel group. In addition, all 2019 nonresident traveler groups arriving at Glacier Park International Airport (2.17 people) stayed longer (6.65 nights) and outspent average statewide nonresident travelers by an estimated \$815 per trip (total trip expenditure of \$1,474).

SUCCESS INDICATORS

- Resort Tax Collections for 3rd and 4th quarters (September - October)
- Lodging Tax Collections for 3rd and 4th quarters (September - October)
- Lodging Occupancy Report for 3rd and 4th quarters (September - October)
- Glacier National Park Recreational Visits (September - October)
- Nonresident Visitor Expenditures (September - October)

DIGITAL ADVERTISING SUCCESS MEASURES

- Ad click through rates
- Ad cost per click
- Views and impressions for video and streaming ads

WEBSITE SUCCESS MEASURES

- Clicks to book
- Clicks to reserve (restaurant)
- Clicks off to stakeholder websites
- Newsletter sign-ups
- Travel guide downloads
- Traffic volume from targeted markets
- Visitor quality measures
 - Bounce rate
 - Length of time spent on site
 - Number of pages viewed

B. Winter: Whitefish offers a world-class ski and snowboarding experience, including unique winter events, yet destination visitation to the town is still significantly lower than the summer season. As a result, Explore Whitefish has allocated 60% of its overall consumer advertising budget to winter ski marketing efforts. These efforts also seek to focus on the winter experiences in Glacier National Park, including sightseeing, snowshoeing, and cross-country skiing. The perception that Glacier National Park is closed in the winter continues to be a challenge and our increased efforts to showcase these winter experiences will hopefully help to dispel this myth. In addition, Whitefish also has fat bike and cross-country skiing experiences near town.

DEMOGRAPHICS

For the 2019/2020 season, the National Ski Areas Association (NSAA) estimated that there were 9.2 million domestic active skiers or snowboarders who account for roughly 2.8% of the total U.S. population (NSAA 2020 U.S. Snowsports Participants Report). Our target audience for this time period are those 35 and older with a household income (HHI) over \$100,000 whose travel or vacation is not restricted by an academic calendar. Since we are targeting a small percentage of the domestic population, and particularly those active participants, we can most efficiently reach this target through niche channels.

OVERVIEW OF SNOWSPORTS VISITS 2019/2020 SEASON

Source: NSAA, ITRR, WMR, 2019/2020 ski season ended prematurely due to the COVID-19 pandemic.

- 51 Million: Nationwide (-14%)
- 1 Million: Montana (-42%)
- 358,409: Whitefish Mountain Resort (-6.9%)*

Visits up 5% compared to the same point last season. Season ended 21 days early due to COVID-19.

WHITEFISH MOUNTAIN RESORT OVERNIGHT VISITOR CHARACTERISTICS

Source: 2019/20 Whitefish Mountain Resort End of Season Report

- 81% have HHI (Household Income) above \$75,000
- 41% were first time overnight visitors
- 61% were repeat overnight visitors
- Average age was 44.8 years old
- 47% of overnight visitors used air travel
- Average number of nights on trip: 5.8
- Average number of days skied/snowboarded 4.2 days

- Nearly 46% skied/snowboarded for 2 or 3 days
- 49% stayed at accommodations in town while 32% stayed at the mountain

WHITEFISH MOUNTAIN RESORT OVERNIGHT VISITOR AGE GROUPS REPRESENTED

Source: 2019/20 Whitefish Mountain Resort End of Season Report

- 2% Under 18 years old
- 8% 18-24 years old
- 19% 25-34 years old
- 24% 35-44 years old
- 18% 45-54 years old
- 15% 55-64 years old
- 12% 65-74 years old
- 2% 75 and older

WHITEFISH MOUNTAIN RESORT LOCATION OF ORIGIN OF VISITORS

Source: 2019/20 Whitefish Mountain Resort End of Season Report

- 43% Montana (41% in 2018/19)
- 7% Alberta (11% in 2018/19)
- 7% Washington (7% in 2018/19)
- 4% Florida (2% in 2018/19)
- 3% California (3% in 2018/19)
- 3% Minnesota (4% in 2018/19)

PSYCHOGRAPHICS

We largely apply our overall traveler profile to the ski market. Experiential preferences for authentic travel are more likely to appreciate and enjoy Whitefish and then return again in subsequent years. The top reasons for choosing Whitefish for a winter destination were cited as “experience of a prior winter visit” and “affordability compared to other resorts” and “snow conditions” and “lack of crowding” and “the Town of Whitefish” (Whitefish Mountain Resort 2018/19 End of Season Report). It is important that we acquire new, repeat customers, not simply attract one-time visitors who are not a good fit for the Whitefish experience and as a result will not likely return. The addition of marketing the aforementioned Glacier National Park winter experiences provide additional breathtaking experiences for a day off for skiers and snowboarders as well as those who do not alpine ski or snowboard

GEOGRAPHIC AUDIENCE

Seattle, Portland, Chicagoland, Minneapolis, California, Regional Drive-To

SUPPORTING RESEARCH & STATISTICS

In FY20, Explore Whitefish engaged in its sixth consecutive comprehensive cooperative marketing campaign with Whitefish Mountain Resort in the Chicago market as well as in Seattle and Portland. This campaign continued to focus on the Whitefish winter experience with a strong call to action to take direct flights to Glacier Park International Airport (GPIA). In FY21, Explore Whitefish engaged in digital cooperative marketing and media partnership with Whitefish Mountain Resort in our target markets. This included partnerships with Outside Magazine and Teton Gravity Research.

SUCCESS INDICATORS

- Resort Tax Collections for 4th and 1st quarters (December – April)
- Lodging Tax Collections for 4th and 1st quarters (December – April)
- Lodging Occupancy Report for 4th and 1st quarters (December – April)
- Whitefish Mountain Resort Skier Visits (December – April)

- Nonresident Visitor Expenditures (December - April)

DIGITAL ADVERTISING SUCCESS MEASURES

- Ad click through rates
- Ad cost per click
- Views and impressions for video and streaming ads

WEBSITE SUCCESS MEASURES

- Clicks to book
- Clicks to reserve (restaurant)
- Clicks off to stakeholder websites
- Newsletter sign-ups
- Travel guide downloads
- Traffic volume from targeted markets
- Visitor quality measures
 - Bounce rate
 - Length of time spent on site
 - Number of pages viewed

C. Secret Season: The objective is to begin the visitor season earlier and grow occupancy and business levels in the spring and early summer for the time period of May and June. The approach for this time period is to develop and communicate narratives for adventures, activities and specific reasons for visiting Whitefish during these time periods that cannot be experienced if Whitefish were visited during another time of year. As we continue to position Whitefish as the basecamp of Glacier National Park, the narrative will lead with spring experiences in Glacier National Park such as biking or hiking the Going-To-The-Sun Road and wildlife watching. Explore Whitefish has allocated 20% of its overall consumer advertising budgets to spring marketing efforts.

DEMOGRAPHICS

The target audience for this time period are those 35 and older with a household income (HHI) over \$75,000 whose travel or vacation is not restricted by an academic calendar.

PSYCHOGRAPHICS

Travelers seeking active experiences such as road and mountain biking, wildlife viewing, hiking, birding, golf, non-motorized water sports, and horseback riding. Cultural and culinary experiences such as dining, shopping at local shops, attending performing arts, and community events are also considered primary spring activities for Whitefish. This includes traveling to Whitefish primarily for the purpose of relaxing, strolling the streets and shops and trying out great dining and nightlife options.

GEOGRAPHIC AUDIENCE

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Not all visitors are alike. The same is true of their economic impact. Research by ITRR indicates that nonresidents who travel to the state via air spend more money per day and stay longer than the average nonresident traveler group.

- **Average Nonresident Travelers:** The statewide average 2019 nonresident traveler group to Montana (2.19 people) spent an average of \$152.54 per day. With an average length of stay of 4.32 nights, this equates to a total trip expenditure of approximately \$659.
- **Fly-in Nonresident Travelers:** The statewide average 2019 fly-in nonresident traveler group arriving in Montana (2.1 people) spent an average of \$251.54 per day. With an average length of stay of 6.24 nights, this equates to a total trip expenditure of approximately \$1,570.
- **Difference:** \$911 in additional spending per fly-in statewide nonresident travel group. In addition, all 2019 nonresident traveler groups arriving at Glacier Park International Airport (2.17 people) stayed longer (6.65 nights) and outspent average statewide nonresident travelers by an estimated \$815 per trip (total trip expenditure of \$1,474).

SUCCESS INDICATORS

- Resort Tax Collections for 2nd quarter (May - June)
- Lodging Tax Collections for 2nd quarter (May - June)
- Lodging Occupancy Report for 2nd quarter (May - June)
- Glacier National Park Recreational Visits (May - June)
- Nonresident Visitor Expenditures (May - June)

DIGITAL ADVERTISING SUCCESS MEASURES

- Ad click through rates
- Ad cost per click
- Views and impressions for video and streaming ads

WEBSITE SUCCESS MEASURES

- Clicks to book
- Clicks to reserve (restaurant)
- Clicks off to stakeholder websites
- Newsletter sign-ups
- Travel guide downloads
- Traffic volume from targeted markets
- Visitor quality measures
 - Bounce rate
 - Length of time spent on site
 - Number of pages viewed

D. Secret Season and Summer Plus Core Activity - Cycling: In both the Secret Season and Summer Plus, cycling is a strong visitor activity. We have identified road biking the Going-to-the-Sun Road before it opens to cars in the spring as our seminal Secret Season experience and has been the lead in our Secret Season advertising campaigns for the past three years. The development of miles of mountain biking in the Whitefish area has also created a new tourism draw in recent years. Whitefish is also located on three Adventure Cycling routes, creating a favorite stopping point for cyclists on long-distance tours.

DEMOGRAPHICS

Touring cyclists have a median age of 53 and over 50% have an income of \$75,000-\$150,000. Mountain bikers are typically 25-45 years old and the majority are male with a household income level greater than \$80,000.

Source: ITRR Adventure Cycling Study

PSYCHOGRAPHICS

Travelers are spending days cycling, and want to spend time off the bike eating good food, drinking local beer, and experiencing local nightlife.

Source: ITRR Adventure Cycling Study

GEOGRAPHIC AUDIENCE

Washington and Oregon, Regional Drive-To, National

SUPPORTING RESEARCH & STATISTICS

A study performed by ITRR and Adventure Cycling found that bicycle travelers spend an average of \$75-\$102 per person per day, and time spent in Montana tends to be eight days or longer. This equates to an estimated \$180 additionally spent by a bicycle traveler over the average non-resident traveler in an eight day period. Mountain bike tourism has seen significant increase and economic impact as well. Between the cross-country style of The Whitefish Trail and the downhill lift accessed trails at Whitefish Mountain Resort, serious investment has been made by the community and member businesses to appeal to local riders and visitors alike. Destination Analysts activity-based segmentation by expected in spending Montana reveals that travelers interested in biking (mountain biking, road biking, etc.) have the potential to average over \$2,000 per trip in total spending.

NON-RESIDENT BICYCLING ACTIVITIES WHILE IN MONTANA

Source: 2020 ITRR Non-Resident Visitor Study

- 7% Bicycling
- 5% Mountain Biking
- 2% Road/Touring Bicycling

A 2018 study conducted by Headwaters Economics in partnership with Whitefish Legacy Partners and Explore Whitefish found that The Whitefish Trail contributes to \$6.4 million in annual spending by visitors who come to enjoy the trail and by locals who purchase or rent outdoor gear at local stores. Spending by visitors who use the Whitefish Trail translates to 68 additional jobs and \$1.9 million in labor income in Whitefish. Visitors whose primary purpose is outdoor recreation have significantly greater daily and overall spending than those who are not in Whitefish for outdoor recreation and they tend to stay in the area longer, further increasing their economic impact.

AVERAGE DAILY SPEND DURING VISIT TO WHITEFISH

Source: 2018 Headwaters Economic Study

- Non-Recreation Visitors: \$227
- Recreation Visitors: \$278

AVERAGE LENGTH OF VISIT TO WHITEFISH

Source: 2018 Headwaters Economic Study

- Non-Recreation Visitors: 4.2 nights
- Recreation Visitors: 5.8 nights

AVERAGE TOTAL TRIP SPENDING

Source: 2018 Headwaters Economic Study

- Non-Recreation Visitors: \$1,323
- Recreation Visitors: \$1,991

During the spring and summer of 2015, ITRR conducted an additional bicycle study in Glacier National Park. Summer bicyclists included a significant representation of non-residents and the information below pertains to summer bicyclists only.

TOP 5 AREAS WHERE GLACIER NATIONAL PARK VISITORS BICYCLED DURING THEIR TRIP IN MONTANA

Source: 2016 ITRR Non-Glacier NP Bicycle Study. The total response percentage exceeds 100% because the question allowed for multiple choices thus the total number of answer choices selected were greater than the number of respondents

- 61% Within Glacier National Park
- 44% West Glacier
- 35% Other Areas Of Montana
- 34% Whitefish

- 25% St. Mary

RESPONDENT BICYCLE BEHAVIOR IN MONTANA

Source: 2016 ITRR Non-Glacier NP Bicycle Study. The total response percentage exceeds 100% because the question allowed for multiple choices thus the total number of answer choices selected were greater than the number of respondents

- 84% Brought a bike
- 22% Bicycled into Montana
- 14% Rented a bicycle
- 11% Took an organized bicycle tour

SUCCESS INDICATORS

- Resort Tax Collections for 2nd and 4th quarters (May - June, September - October)
- Glacier National Park Recreational Visits (May - June)
- Whitefish Mountain Resort lift accessed mountain biking ticket sales
- Economic and usage impact study collected by the Whitefish Legacy Partners (Whitefish Trail)

E. Visitor Fulfillment: In order to deliver on the orientation and facilitation portion of the travel funnel, Explore Whitefish uses a number of visitor fulfillment tools. These tools include the website, toll-free visitor information phone number, local and regional visitor information centers, display racks at local businesses, and visitor information kiosks located in town and at Glacier Park International Airport. These tools are important to help connect visitors with our Travel Guide and locator map highlighting our local business as well as helping visitors have a great experience once they are here. In FY22, Explore Whitefish will supply 20,000 Whitefish Travel Guides and between 50,000-75,000 Whitefish Town Maps.

DEMOGRAPHICS

33-55+ years of age with household incomes beginning at \$75,000

PSYCHOGRAPHICS

Travelers seeking active experiences as well as casual experiences such as dining and shopping are also considered primary autumn and spring activities for Whitefish. This means traveling to the town primarily for the purpose of relaxing, strolling the streets and shops and trying out great dining and nightlife options.

GEOGRAPHIC AUDIENCE

Travelers and potential travelers from our core target markets. However, our visitor fulfillment services are available for all travelers and potential travelers regardless of geographic market. This includes travelers at the local level once they have arrived on-site and where we direct them to the various experiences that Whitefish has to offer.

SUCCESS MEASUREMENTS

- **Travel Guide:** Increased readership via digital downloads, website requests, on-the-ground distribution locations, and mail fulfillment.
- **Kiosks:** Amount of collateral distributed at the seven town kiosks and the kiosk located at Glacier Park International Airport (GPIA).
- **Visitor Information Center:** Telephone calls and email requests for information. Walk-in visitor fulfillment.
- **Visitor Maps:** Distribution by fulfillment tools. Increase on-the-ground locations.
- **Website:** Increase online travel guide requests.
- **Enewsletter:** Increase engagement from currently list average of 1.5% CTR and 16% open rate.

Industry average 1.6% CTR and 15.2% Open Rate. Source: Mailchimp

F. Social Media: As our overall marketing strategy has evolved to reflect the changing landscape of travel post-pandemic, as well as the emphasis on “recreate responsibly” messaging, so too has our social media strategy evolved. Social media continues to be a powerful tool for telling the Whitefish story and to support and complement other marketing strategies. Social media helps build brand support, raise awareness and allows current and potential

visitors to connect with Explore Whitefish through various channels.

In addition to our established social media goals of engaging potential visitors and keeping Whitefish top-of-mind, the social media program has become a valuable tool for messaging local and statewide health guidelines, crisis communication and general best practices for visitation. These include the aforementioned “recreate responsibly” messaging, information about mask mandates and visitation information related to the ongoing pandemic, wildfire messaging, and informative posts aligning with the Whitefish Sustainable Tourism Management Plan.

Social media has also become a primary advertising tool for Explore Whitefish in its seasonal advertising plans. Social media allows ads to be targeted to audiences that align with our established geographic and demographic audiences.

Social media channels are constantly evolving and Explore Whitefish has identified Facebook and Instagram as the primary channels to focus its efforts on while also using Youtube to support these efforts.

As reflected in the Explore Whitefish Social Media Guidelines, the Explore Whitefish goals for social media include:

- Raise awareness and inspire travelers to visit Whitefish
- Expand the reach and interactions with our social media audience
- Interact with audience to answer questions and facilitate communication and connections
- Provide information to current and potential visitors regarding safety, responsible visitation and best practices.

Themes in messaging will reflect the themes outlined in the overall Explore Whitefish marketing plan as well and the brand pillars established by the Montana Office of Tourism and Business Development:

- **Inspiration:** Lead with beautiful and compelling imagery
 - *Supports the Brand Pillar: More spectacular unspoiled nature than anywhere else in the lower 48 states.*
- **Orientation:** Highlight Whitefish as a vibrant, charming, and welcoming mountain town nestled in Northwest Montana adjacent to Glacier National Park.
 - *Supports the Brand Pillar: Vibrant and charming small town that serve as gateways to natural wonders.*
- **Facilitation:** Highlight amenities and providing specific opportunities for nonresident travelers to experience. This directly addresses the perception that Montana is remote and without adequate facilities as well as provides exposure for member businesses.
 - *Supports the Brand Pillar: Brand Pillar: Breathtaking experiences by day, relaxing hospitality at night.*

AUDIENCE

The target audience for social media efforts mirrors that of the overall marketing plan:

- High potential visitors and geotravelers in core geographic markets (Seattle, Portland, Minneapolis Chicago, Los Angeles, San Francisco, Regional Drive-To)
- Established geographic markets (Calgary, Missoula, Spokane, CDA)

SUPPORTING RESEARCH & STATISTICS

Why use social media? A study published by Convince & Convert found that 53% of Americans who follow brands in social media are more loyal to those brands. By engaging our audience through social media, it allows us to craft relationships with customers before, during, and after they have visited Whitefish.

- Most social media users log into their accounts at least once per day, according to Pew Research Center, and many people are checking social media multiple times per day. An active social media program keeps Whitefish top-of-mind as vacation plans are being made throughout the year.

- 71% of consumers who have had a good social media service experience with a brand are likely to recommend it to others. (Source: Ambassador)
- Explore Whitefish will continue to rely on its beautiful surroundings to help promote the area to potential visitors. According to Hubspot, visual content is more than 40 times more likely to get shared on social media than other types of content.
- The Explore Whitefish social media channels continued to experience rapid growth in FY21. Instagram remained the largest audience with 42,901 followers although Facebook surpassed Instagram in total impressions (10,364,434) and total engagements (418,377). (time period: 2/1/20-1/31/21)

● **Audience observations for a 1-year time period: 2/1/20 - 1/31/21**

- Instagram:
 - 42,901 followers (+36.95% YOY)
 - 6,249,545 total impressions (-1.2% YOY)
 - 222,080 total engagements (+9.8% YOY)
- Facebook:
 - 28,399 fans (+19.10% YOY)
 - 10,364,434 total impressions (+28.4% YOY)
 - 418,377 total engagements (+61.8% YOY)

MEASURING SUCCESS

A successful social media program is measured by more than just total audience size. Having an audience that actively engages and interacts with Explore Whitefish through social media channels is equally as important as total audience size. Social media success will primarily be measured by audience engagement. Individual benchmarks for each platform in FY22 are as follows:

Instagram

- Increase the total number of followers by 30% over FY21 total.
- Increase the total number of engagements (post likes and comments) by 15% over FY21 total.

Facebook

- Increase the total number of followers by 20% over FY21 final number.
- Increase the total number of engagements (likes, comments and shares) by 50% over FY21 total.

METHODS FOR CONSUMER

\$124,905 PUBLIC + \$219,200 PRIVATE = \$344,105 COMBINED

Creative Services\$0 Public \$103,500 Private

Strategic planning, design, execution, and reporting of our consumer advertising campaigns.

eNewsletters \$0 Public \$2,050 Private

Monthly newsletters are planned throughout the year promoting shoulder season activities and events to our consumer distribution list. In FY22, this strategy will be expanded to twice monthly based upon a content calendar. A weekly newsletter highlighting local events and tourism news is also provided to business members of Explore Whitefish.

Facilitation Collateral..... \$0 Public \$26,500 Private

Printed travel guides and locator maps are developed for distribution when visitors request information via the website or toll-free telephone, and also for distribution at local and regional visitor information centers and local businesses as well as the information kiosks located around Whitefish and at Glacier Park International Airport (GPIA).

Online & Digital Advertising \$119,905 Public \$5,000 Private

We advertise in our stated target markets as well as nationally through cooperative opportunities with the Montana Office of Tourism and Business Development. In FY22, this method will comprise 100% of our consumer advertising budget. Our online and digital advertising will be broken out into digital placement (50%), media partnerships (30%),

and video/audio streaming services (20%).

Out of Home..... \$0 Public \$0 Private

Traditionally, we have explored opportunities to advertise on and around public transportation, including bus wraps, digital displays and billboards, and inside airport terminals, particularly with cooperative partners such as Whitefish Mountain Resort in our target markets. In FY22, we are shifting our consumer advertising budget to online and digital advertising.

Photography & Video \$5,000 Public \$21,000 Private

Purchasing the rights to photos and video content for use in our consumer advertising, social media channels, and website.

Print Advertising..... \$0 Public \$0 Private

Traditionally, we have advertised in publications within our target markets with alignment to the geotraveler and other demographic profiles that have been outlined for Whitefish. In FY22, we are shifting our consumer advertising budget to online and digital advertising.

Promotions..... \$0 Public \$8,000 Private

Explore Whitefish engages in winter athlete sponsorships, which includes product placement, co-marketing opportunities, and other strategic relationships.

Social Media..... \$0 Public \$6,000 Private

Explore Whitefish has set aside a monthly budget for FY22 dedicated to boosted posts on our social media networks of Facebook and Instagram to further amplify our messaging. This includes boosting popular posts highlighting activities identified in our marketing plan, recreate responsibly messaging, cross-promoting other seasons, and health and safety messaging.

Visitor Information Services \$0 Public \$15,150 Private

Our strategic partnership with the Whitefish Chamber of Commerce allows us to connect potential visitors with toll-free telephone information and on the ground visitors with access to walk-in information with extended hours during our busy summer season. We stock an information kiosk at GPIA as well as the six information kiosks, four of which are wi-fi enabled courtesy of Explore Whitefish, located around downtown Whitefish throughout the year. We also pay for additional rack space at strategic locations around the Flathead Valley.

Website \$0 Public \$32,000 Private

Our website, ExploreWhitefish.com, serves as a core fulfillment mechanism for advertisements and marketing communications. The site provides opportunities for site visitors to discover places to stay, eat, shop, and things to do. The Member Center provides up-to-date information on the activities of the organization for business members and the Media Center provides applicable information for travel writers or members of the media.

3.2 MARKETING SEGMENT: PUBLICITY

A. STRATEGY FOR PUBLICITY

The Explore Whitefish contracted PR agency works directly with editors, writers, bloggers, photographers, videographers, and digital influencers to produce stories, photography, and videos supporting the Explore Whitefish brand. Based on the current pandemic and recent adoption of the Sustainable Tourism Management Plan (STMP), the PR program is focused on earning media placement in the outlined Explore Whitefish target audiences incorporating the Whitefish Brand Pillars, while messaging from the emerging themes of sustainable visitation and Covid-safe visitation. All current media pitches are focused on Covid-safe activities with continued education on how to recreate responsibly using best safety practices. This message will be a priority for as long as the pandemic presents a threat to public health. Updated messaging may likely be needed by the end of Q2 2021.

Whitefish faces several challenges directly related to increased tourism in summer, including housing, transportation, infrastructure, and quality of life. To help temper peak season visits, the PR team does not host media in the summer and earned media efforts only promote fall, winter, and spring visitation. Additionally, PR efforts avoid marketing to “the masses” and instead focus on targeting audiences in the geo-traveler niche who appreciate a sense of place, treat resources and people with respect, and travel lightly. By promoting Whitefish through the lens of sustainable visitation, adhering to our brand pillars, and carefully selecting media dedicated to telling our story in this light, the Whitefish brand will continue to attract geo-travelers and support more balanced visitation annually.

Strategic partnerships with MOTBD, Western Montana’s Glacier Country, and Whitefish Mountain Resort further leverage efforts, budgets, and media reach. With our partners, the PR team garners on-brand, influential media coverage by pitching ideas for unique story angles and experiences, coordinating the logistics for well-planned media trips, fact checking, as well as providing photography and video assets to inspire targeted travelers. Additionally, digital results of PR efforts further leverage the reach of well-branded coverage by WCVB’s use on social media channels and website content.

The PR team also supports the Explore Whitefish Athlete Sponsorship Program by negotiating, coordinating, and executing on annual deliverables. One of the FY21 deliverables for the Maggie Voisin sponsorship program included participation in a Covid-safe video series which was later posted on the Explore Whitefish and Whitefish Mountain resort social platforms (Instagram and Facebook). These videos reached a potential audience of over 120,000. For FY20, Maggie competed in the 2020 Winter X Games which garnered over 111,000 in-person attendees. Winter X Games typically reaches at least 20 million viewers between ESPN and ABC. “Whitefish, Montana” is always announced as her hometown and as an Explore Whitefish Sponsored Athlete, she attaches Whitefish, Montana stickers to every pair of skis on which she competes. The ad value for this type of exposure is at least \$115,000, which is the average cost of a 30-second TV ad airing on a national network in the US.

Beyond publicity, a portion of the PR efforts continues to focus on crafting and effectively implementing crisis communication strategies for both brand and community protection. These occur in partnership with the City of Whitefish, strategic DMO partners (MOTBD, Glacier Country, and Discover Kalispell, for example), and local land managers. Crisis PR efforts also include outreach to media and messages through WCVB communication channels (website, social media, e-news, etc.). Topics in this area have been related to environmental events like wildfires, issues surrounding hate and extremist’s threats, marches, and terrorism, and of course, the global pandemic. Timely and effective messaging can influence consumer travel decisions, mitigate cancellations, and provide guidance for safe travel for those planning a trip and for visitors on the ground. One example of this is the launch of WhitefishCovidCares.com, a resource created in May 2020 by the PR team and WCVB staff. The team continues to update the website with the latest health information and resources for businesses, visitors, and locals. Crisis communications, or lack thereof, can significantly contribute to positive or negative factors affecting the short and long term economy and community health of Whitefish.

SUPPORTING RESEARCH & STATISTICS

Given today’s complex ecosystem of media, consumers are hard pressed to discern credible media sources. A Nielsen study commissioned by *inPowered* on the role of content in the consumer decision-making process concluded that PR is almost 90% more effective than advertising. The study found that, “On average, expert content lifted familiarity 88 percent more than branded content.”

Another study published by the *Journal of Promotional Management* found that its 1,500 participants were most likely to

find an earned media story as the most credible news source compared to a newspaper advertisement, a native advertisement, a blog written by an independent source, and a blog written by a company. Participants indicated that strong writing, numerous facts, and a balanced perspective lead them to trust a news story.

PR compliments and reinforces advertising and vice versa. While paid advertising provides the opportunity for the destination to inspire and tell the consumer what sets them apart from the competition, earned content lets others sing our praises and ultimately adds more credibility to our brand. This implied third-party endorsement not only impacts credibility among potential visitors but offers a significant return on investment. For example, a one-page ad in Travel + Leisure magazine costs approximately \$190,000 (not including creative). While acknowledging that earned media and paid advertising support one another — and neither is as effective alone without the other — earned media is strategically leveraged within media platforms where Explore Whitefish has advertisement placements.

The Explore Whitefish FY20 PR Program reached an audience of over 1.1 billion through tracked earned media placement (Source: Meltwater). Tracking for FY21 as of January 2021 shows an audience reach over 359 million, despite challenges of not being able to host media and having to rely solely on Covid-safe media relations since March 2020.

For contrast, last fiscal year the PR team participated in the following:

- TBEX media event with over 400 travel bloggers and influencers.
- The PR team planned and hosted 54 media visits in conjunction with local and regional partners prior to COVID-19 shut downs and media trip cancellations in FY20, including:
 - Angie Away and Jet Sisters media trip co-op with Glacier Country
 - Kristin Addis, Be My Travel Muse media trip co-op with MOTBD
 - Chad Scott and Kristi Dosh media trip co-op with Glacier Country
 - Donnie Sexton and David Lang media trip
 - Priya Vin, Monique Wise, Jennifer Coleman, Kristi Trimmer TBEX Post Trip Wander in Whitefish
 - Local/Regional Digital Influencer Meet-Up co-op with Whitefish Mountain Resort
 - Freeskier media trip co-op with MOTBD
 - Grant Gunderson photo shoot with MOTBD
 - Pam Houston media trip
 - PR Partner Fam Trip (Hoffman York New Staff, MOTBD and Glacier Country);
 - Nina Hahn media trip
 - Southern Flair blogger/influencer co-op trip with MOTBD
 - PICTURE media trip co-op with MOTBD

Due to COVID-19, all media trips were canceled starting March 2020. The PR team prepared Covid-safe messaging for ExploreWhitefish.com commencing on March 3, 2020.

MEASURING SUCCESS

The Explore Whitefish PR program will be measuring success against media goals and destination stewardship goals.

MEDIA GOALS

- Earned media related to travel in Whitefish (i.e. not crisis) based on an audience reach of 1.1 billion in FY20, and an advertising value equivalency (AVE) of \$10.2 million.
- On-brand media stories and how they were earned — through media relations, media events or media trips (noting the last two may not happen until FY21 Q2).
- Leveraging articles through the WCVB posting on its website and social media channels and tracking engagement. Repurposing content on website and tracking use.
- Providing deliverables for Explore Whitefish Athlete Sponsorship Program.

DESTINATION STEWARDSHIP GOALS

Focus on implementation of the Whitefish Sustainable Tourism Management Plan (STMP) and integration into the Whitefish Brand

- Taking the lead on outreach segments of the Sustainable Tourism Management Plan (STMP) to build awareness and influence visitor behavior, with particular focus on the peak summer season.
- Encouraging use of public transportation, and supporting local industry by staying in hotels or lodges.
- Pitch media coverage to include topics such as recreating responsibly, leave no trace, respecting public and private lands, recycling, aquatic invasive species (AIS) education, wildfire mitigation, water quality best practices, reducing wildlife conflicts, etc.
- Support future communications efforts associated with the STMP roll out.

METHODS FOR PUBLICITY

\$0 PUBLIC + \$130,900 PRIVATE = \$130,900 COMBINED

Content Creation

Photography and content contribution for social channels and website, to support marketing campaigns, publicity, and promotions.

Database & Clips

Researching and cataloguing all relevant articles published throughout the year. This provides the foundation for calculating our reach and advertising equivalencies, which provides a valuable measure of success.

Media Events.....

Opportunities to individually or jointly host press events in our core and emerging geographic markets, often planned with PR partners at region and state level.

Media Relations.....

Correspondence with target freelancers, publications, websites, and broadcast outlets with story idea pitches, fact checking, trends, and photography/videography needs.

News Releases

Factual information regarding events, trends, travel packages, etc. New releases are distributed to target media for editorial consideration of placement or catalyst to research more information for feature story placement.

Online Media Kit

Updating our online Media Page resource and hosting under ExploreWhitefish.com with facts, story ideas, events, photography, and other information for editorial needs.

Planning, Reporting & Meetings

Throughout the year, our agency of record participates in team meetings, board meetings, marketing meetings and provides reports and presentations as requested on PR related activities. Budget and publicity reports are submitted quarterly.

PR Expenses & Travel

Expenses and travel related to executing on the publicity strategy.

PR Opportunity.....

Throughout the year, new public relations opportunities present themselves that were not specifically budgeted for.

PR Promotions

Aligned with specific campaigns, we participate in strategic promotions. This includes athlete sponsorships and coordinations of those sponsorships and related assets with media partners and outlets.

Press Trips

Coordinate onsite logistics and experiences for first hand travel story research.

3.3 MARKETING SEGMENTS: GROUP MARKETING

STRATEGY FOR GROUP MARKETING

The meeting and convention industry has shifted dramatically during the pandemic. Business travel was largely discontinued worldwide resulting in a sharp decline in meeting and convention business in 2020. As the industry continues to evolve, Explore Whitefish is working to best assist member properties in securing future group business in Whitefish.

Meeting and convention business has traditionally helped to support our member lodging properties through the non-peak visitation periods of fall, winter and spring. Many properties have availability to accommodate larger groups for lodging, meeting venue space and food and beverage offerings. The town of Whitefish offers additional benefits through a variety of excellent dining options, boutique shopping, art galleries, nightlife, and high quality performing arts venues and companies. Combined, this makes Whitefish a desirable location for a variety of meeting and convention groups.

DEMOGRAPHICS

The target audience for group travel is categorized into two basic groups: SMERF (Social, Military, Educational, Religious, Fraternal) and MICE (Meetings, Incentive, Conferencing, Exhibitions). Both audiences desire a scenic location with availability of activities for recreation and team building. The majority of groups that visit the Whitefish area are in the 25-150 person range, although Whitefish can comfortably accommodate citywide groups up to 300 participants and has submitted multi-property proposals for groups of 400+.

GEOGRAPHIC AUDIENCE

Aligning with the Montana Office of Tourism and Business Development, target areas include Seattle, Portland, Minneapolis and Chicago. Additional areas of focus include Alberta (including but not limited to Calgary and Edmonton) and in-state and regional drive markets (including Missoula, Spokane, Great Falls and Helena).

SUPPORTING RESEARCH & STATISTICS

Examples of the types of organizations and meetings that have visited Whitefish previously include: corporate board retreats and company meetings (Edward Jones, Enterprise Holdings, Weyerhaeuser, CrossFit, Toyota, Honda, etc), Organizations & Clubs (Florida Ski Council; Rocky Mountain Elk Foundation; Professional Ski Instructors of America; Road Scholar Programs), military family retreats, weddings and large family reunions.

MEASURING SUCCESS

- Participate in FAM Tours and attend group travel shows (IMEX; additional shows possible) in conjunction with Glacier Country Regional Tourism, the Montana Office of Tourism and Business Development and local lodging partners.
- Follow up on leads generated from FAM trips and Trade Shows.
- Complete RFPs for city-wide meetings and conventions which are a fit for the capacity of Whitefish.
- Production of Group Sales warm season (Spring/Fall-themed) video.
- Host quarterly Explore Whitefish Groups Committee meetings.

Ski Group Marketing: The winter season ski product is a strong offering that has potential for growth. Participating properties and Whitefish Mountain Resort are cooperatively marketing winter ski trips to groups of skiers from across the country. Ski clubs contribute significant revenue in the number of rooms rented and lift tickets purchased. Their length of stay combined with their group size represent a significant number of room nights. While access to the area represents one of the biggest challenges for getting ski groups here, increases in both number of flights and destinations serviced by Glacier Park International Airport (FCA) have continuously improved accessibility every year. Whitefish Mountain Resort ski group business has shown historical increases year to year.

SUPPORTING RESEARCH & STATISTICS

Whitefish Mountain Resort has a good indication of the volume of ski groups from their own lodging and group tickets ordered by groups staying in other properties. In addition, multiple Explore Whitefish member properties attend spring ski shows:

- Ski Councils: Chicago Metro, Detroit, Florida, Texas

- PRW Shows: DC, Detroit and Philadelphia
- Far West Ski Association
- Mountain Travel Symposium
- Mid-Atlantic and East Coast Shows

MEASURING SUCCESS

- Increase the number of ski groups, ski councils and ski tour operators to 70 (5% increase) for the 20/21 ski season, based on 62 visits during the 18/19 ski season and 67 visits during the 19/20 ski season.
- Participate in at least two industry events (either virtual or in-person).
- Participate in at least two FAM trips (either virtual or in-person)

METHODS FOR GROUP MARKETING

\$0 PUBLIC + \$10,000 PRIVATE = \$10,000 COMBINED

Facilitation Collateral.....

Create and update WCVB Groups Committee materials for distribution to prospective groups.

FAM Trips

Assist Whitefish properties with familiarization trips to enable properties to invite meeting planners and group representatives to experience Whitefish in person. WCVB support can include providing airfare as well as assisting with activities, meals and transportation.

Trade Shows.....

Attend trade shows in partnership with Whitefish lodging partners and regional tourism organizations (Glacier Country Tourism). This may include both virtual shows and in-person shows once travel becomes more available. Explore Whitefish will also support member participation in spring group ski shows, which are focused on ski clubs and ski groups that have historically stayed at a variety of lodging properties.

Groups Opportunity Marketing.....

Throughout the year, new marketing opportunities present themselves that were not specifically budgeted for. Money is therefore set aside to examine these opportunities and potentially act upon them if they are in line with our groups marketing strategy. This is especially important this year as the meeting and convention industry continues to shift dramatically due to the pandemic.

3.4 MARKETING SEGMENT: MARKETING SUPPORT

STRATEGY FOR MARKETING SUPPORT

In order for Explore Whitefish to effectively and strategically operate, the organization has set aside a budget to support the marketing efforts of the organization. This includes administrative and meeting costs, membership dues, strategic planning, marketing research, and funding for local, regional, and state-wide collaborative efforts that highlight and enhance our tourism economy. We believe that these types of efforts create results that we would not otherwise be capable of producing independently.

METHODS FOR MARKETING SUPPORT \$2,000 PUBLIC + \$309,222 PRIVATE = \$311,222 COMBINED

Administration \$0 Public \$164,948 Private

In order to promote Whitefish effectively and strategically, we require administrative support for staff and business expenses.

Crisis Management \$0 Public \$30,000 Private

Communications between industry partners and externally to media outlets are effectively executed when environmental or economic factors affect travel to Whitefish and during visitation to Whitefish.

Marketing Personnel \$0 Public \$45,263 Private

Explore Whitefish staff is needed in order to execute the goals and objectives of the organization.

Opportunity Marketing..... \$50 Public \$3,011 Private

Throughout the year, new marketing opportunities present themselves that were not specifically budgeted for. Money is therefore set aside to examine these opportunities and potentially act upon them if they are in line with our marketing strategy.

Research \$0 Public \$20,000 Private

In order to gauge the effectiveness of our marketing and public relations efforts, Explore Whitefish will take part in research. Explore Whitefish is currently partnering with Smith Travel Research, Sprout Social, and Meltwater. Explore Whitefish will continue to engage in additional cooperative research projects, such as VisaVue and AirDNA with MOTBD.

TAC & Governor's Conference Meetings..... \$1,950 Public \$0 Private

Explore Whitefish is required to attend all meetings of the Tourism Advisory Council (TAC) as well as the annual Governor's Conference on Tourism and Recreation. As these meetings take place all over the state, we require support for travel and expenses to attend.

Tourism Outreach & Support \$0 Public \$46,000 Private

Explore Whitefish engages in various methods of outreach and support, including the WCVB Grant Program, designed to provide members and Montana non-profit organizations with funds to help drive visitation during the shoulder and winter seasons, as well as supporting Voices of Montana Tourism. During FY22, Explore Whitefish will help to lead the implementation of the Whitefish Sustainable Tourism Management Plan with the City of Whitefish as well as creating a peak season on-the-ground visitor education campaign.

Explore Whitefish also recognizes that one of the biggest challenges we face is the limited transportation infrastructure in our region. Explore Whitefish is a board member and financial sponsor of Glacier AERO (Airline Enhancement and Retention Outreach). The mission of this organization is to work with community partners and various airlines to increase spring, winter, and fall airline routes to Glacier Park International Airport (GPIA). Explore Whitefish is also supportive of the Big Mountain Commercial Association (BMCA) S.N.O.W. Bus in Whitefish.

APPENDIX

This report summarizes nonresident visitors to Montana during quarter(s) 1,3,4, 2020.

These travelers spent at least one night in the following city: Whitefish.

This sample size of 71 survey respondents, which equates to 6.9% of all nonresident visitors, represents a total of 610,236 people.

Sites Visited on Trip

86%	Glacier National Park
35%	Flathead Lake State Parks
34%	Yellowstone National Park
16%	Hot springs
13%	Bob Marshall Wilderness
12%	Ghost towns
11%	Little Bighorn Battlefield
7%	Grizzly & Wolf Discovery Center, West Yellowstone
7%	Other Montana State Parks
5%	MT Historical Museum, Helena
5%	National Bison Range
4%	Museum of the Rockies, Bozeman
3%	Virginia/Nevada City
3%	Bighorn Canyon Nat'l Recreation Area
1%	CM Russell Museum, Great Falls
1%	Lewis & Clark Interpretive Ctr, Great Falls
1%	Big Hole Battlefield
1%	Fort Peck Lake
1%	Missouri Headwaters State Park
1%	Missouri River Breaks Nat'l Monument
--	Clark Canyon Reservoir
--	Rocky Mountain Elk Foundation
--	Lolo Pass Interpretive Center
--	Ft. Peck Interpretive Center & Museum
--	Lewis & Clark Caverns State Park
--	C.M. Russell National Wildlife Refuge
--	Pompey's Pillar

Group Characteristics

20%	of groups with all first time visitors
65%	of groups with all repeat visitors
15%	of groups with mixed first time and repeat visitors
19%	Flew on a portion of their trip
7%	Own a 2nd property in MT
15%	Hired an outfitter
76%	Plan to return within 2 years

Reasons for Trip

primary reason		all reasons
64%	Vacation/recreation/pleasure	79%
23%	Visit friends/relatives/family event	29%
7%	Other	7%
6%	Just passing through	7%
1%	Shopping	3%
<1%	Business/convention/meeting	7%

Activities

70% Day hiking
 67% Scenic driving
 46% Recreational shopping
 42% Wildlife watching
 34% Car / RV camping
 33% Visit local brewery
 30% Nature photography
 26% Visiting other historical sites
 20% Fishing / fly fishing
 17% River rafting / floating
 14% Canoeing / kayaking
 14% Visit farmers market
 13% Bicycling
 12% Visiting Lewis & Clark sites
 11% Visiting Indian reservations
 11% Skiing / snowboarding
 8% Mountain biking
 8% Viewing art exhibits
 7% Motorboating
 5% Backpacking
 4% Visit local distillery
 4% Visiting museums
 3% Golfing
 3% Road / tour bicycling
 3% Rockhounding
 3% Birding
 2% Attending performing arts
 2% Attending festivals or events
 1% Attend wedding
 1% OHV / ATV
 1% Geocaching
 1% Horseback riding
 1% Dinosaur attraction
 1% Snowshoeing
 1% Snowmobiling
 1% Cross-country skiing
 1% Sporting event
 -- Hunting
 -- Motorcycle touring
 -- Rock climbing

Travel Mode to Enter MT

79% Auto/Truck
 11% Air
 10% RV/Trailer
 -- Train
 -- Motorcycle
 -- Bus
 -- Other

Average Length of Stay in MT 7.28 nights Of Nights Spent in MT

80% of nights spent in Glacier Country
 13% of nights spent in Yellowstone Country
 2% of nights spent in Central Montana Region
 2% of nights spent in Southeast Montana Region
 2% of nights spent in Southwest Montana Region
 1% of nights spent in Missouri River Country

Percent of Nights Spent in Each Lodging Type

31% Hotel/motel
 22% Private campground
 18% Home/condo/cabin of friend/relative
 14% Rented entire cabin/home
 5% My second home/condo/cabin
 5% Public land camping
 1% Rented room in home
 1% Resort/condominium
 1% Bed & Breakfast
 1% Other
 <1% Vehicle in parking area
 -- Guest ranch

Montana Entry Points

25% Superior
 12% Heron
 10% Wibaux/Beach
 7% Monida
 6% Sula
 6% Lodge Grass
 6% Kalispell Air
 6% West Yellowstone
 5% Culbertson/Bainville
 4% Troy
 3% Missoula Air
 3% Roosevelt
 2% Bozeman Air
 2% Lolo

If on Vacation, Attracted to Montana for...			
Primary Attraction			All Attractions
43%	Glacier National Park		82%
17%	Open space / uncrowded areas		60%
14%	Mountains / forests		70%
11%	Ski / Snowboard		12%
5%	Family / friends		13%
5%	Fish		24%
4%	Lakes		44%
2%	Resort / guest ranch		9%
1%	Yellowstone National Park		34%
--	A Montana State Park		6%
--	Camping		26%
--	Hiking		42%
--	Hunting		--
--	Lewis & Clark history		9%
--	Native American history & culture		11%
--	Northern great plains / Badlands		10%
--	Other Montana history & culture		9%
--	Rivers		45%
--	Snowmobile		1%
--	Special events		1%
--	Wildlife		32%

Satisfaction with Aspects of Montana								
	Very dissatisfied	Dissatisfied	Somewhat dissatisfied	Somewhat satisfied	Satisfied	Very satisfied	N/A	Mean
Highway rest areas	--	--	--	10%	34%	25%	32%	5.24
Availability of recycling bins	10%	8%	3%	11%	26%	15%	27%	4.2
Availability of travel information	--	--	5%	--	47%	30%	18%	5.26
Amount of historical roadside information	--	--	2%	1%	43%	25%	28%	5.26
Access to public lands	--	3%	1%	4%	41%	34%	16%	5.23
Amount of open space	2%	--	--	2%	21%	70%	5%	5.67
Wildlife viewing opportunities	2%	--	--	13%	32%	44%	8%	5.33
Stewardship of the land	2%	7%	--	1%	40%	31%	19%	5.18
A feeling of being welcomed	2%	5%	4%	8%	25%	54%	2%	5.4
Main streets reflecting local culture/heritage	--	2%	8%	8%	36%	36%	11%	5.19
Restaurants with local products	--	3%	1%	9%	30%	40%	16%	5.3
Availability of local arts and crafts	--	--	--	10%	27%	26%	37%	5.3

Residency

21% Washington
11% California
6% Illinois
6% Utah
6% Wisconsin
5% Colorado
5% Texas
4% Oregon
4% Iowa
3% North Dakota
3% Minnesota
3% Florida
3% Arizona
3% Michigan
3% Alaska
2% Wyoming
2% Pennsylvania
1% Indiana
1% Alberta, Canada
1% North Carolina
1% Nebraska
1% British Columbia, Canada
1% Vermont
1% New York
1% Missouri
1% Idaho
<1% Massachusetts

Respondent Age

26 - 83 Age range
55 Average age
58 Median age

Respondent Gender

57% Male
43% Female
22% First time visitor

Household Income

11% Less than \$50,000
11% \$50,000 to less than \$75,000
39% \$75,000 to less than \$100,000
11% \$100,000 to less than \$150,000
10% \$150,000 to less than \$200,000
18% \$200,000 or greater

Age Groups Represented

5% 0-5 years
10% 6-10 years
10% 11-17 years
6% 18-24 years
15% 25-34 years
15% 35-44 years
17% 45-54 years
48% 55-64 years
25% 65-74 years
8% 75 and over

Travel Group Type

16%	Self
47%	Couple
31%	Immediate Family
1%	Family & Friends
5%	Friends
--	Business Associates
--	Extended Family
--	Organized Group or Club

Average Group Size: 2.38

Travel Group Size

16%	1 traveler
59%	2 travelers
5%	3 travelers
14%	4 travelers
5%	5 travelers
2%	6 travelers
--	7 travelers
--	8 travelers
--	9 travelers
--	10 travelers
--	more than 10

Info Sources Used for Trip Planning

Most Useful		All Used
13%	Info. from friend/relative living in MT	31%
10%	Info. from previous visitor(s) to MT	34%
3%	Other	4%
2%	National Park brochure/book/website	28%
2%	Social media (i.e. Facebook)	13%
2%	MT community travel guide(s)	2%
2%	Used no sources	11%
2%	Magazine/newspaper articles	3%
2%	Mobile apps	13%
--	"Made in Montana" website	--
--	Automobile club (i.e. AAA)	6%
--	Called a MT visitor info. line/center	--
--	Consumer online reviews (i.e. TripAdvisor)	24%
--	Guide book (i.e. Frommer's Lonely Planet)	9%
--	Info. from private businesses	5%
--	Info. from special events	3%
--	Magazine/newspaper article online	3%
--	Montana advertising campaign	--
--	Official MT guidebook magazine	5%
--	Official MT website (VisitMT.com)	20%
--	Online Video	7%
--	Online travel agent (e.g., Travelocity)	2%
--	Other travel websites	5%
--	Professional online travel reviews	2%
--	Regional MT travel guide(s)	7%
--	Search Engine (i.e. Google)	63%
--	State Park brochure/website	9%

Sources Used During Trip

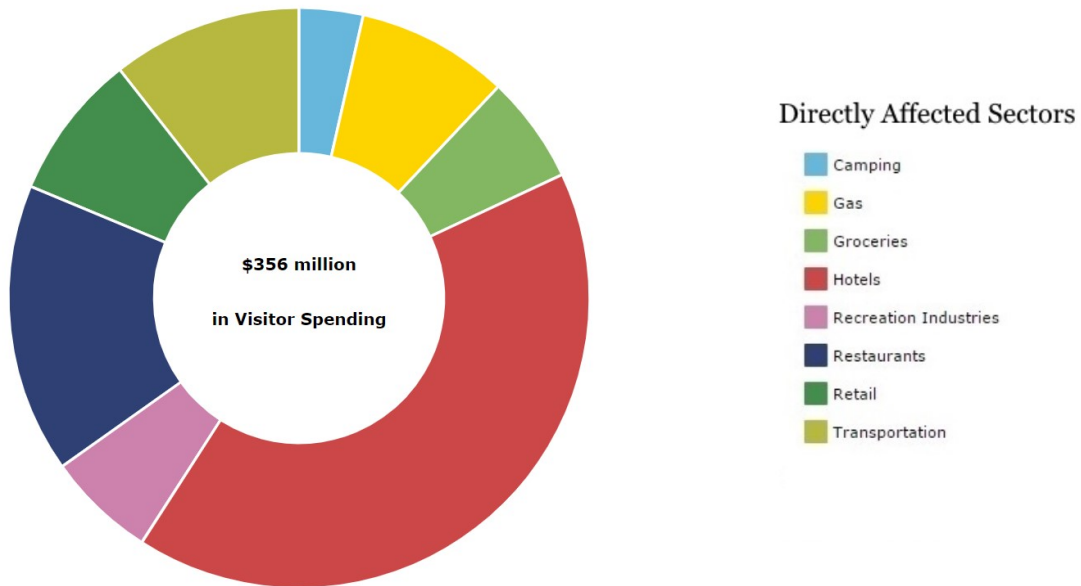
Most Useful		All Used
22%	Search engine (e.g., Google)	57%
16%	Info. from friend/relative living in MT	23%
9%	National Park brochure/book/website	46%
6%	Visitor information center staff	12%
3%	Brochure information rack	18%
3%	MT community travel guide(s)	4%
2%	Official MT website (VisitMT.com)	10%
1%	Other	9%
--	"Made in Montana" website	1%
--	Billboards	1%
--	Consumer online reviews (i.e. TripAdvisor)	23%
--	Guide book (i.e. Frommer's Lonely Planet)	5%
--	Info. from private business (e.g., resort/motel/attraction)	9%
--	Map applications (i.e. GoogleMaps)	69%
--	Mobile apps	12%
--	Motel/restaurant/gas station employee	--
--	Official MT guidebook magazine	9%
--	Official highway information signs	22%
--	Regional MT travel guide(s)	6%
--	Social media (i.e. Facebook)	13%
--	State Park brochure/website	16%
--	Used No Sources	6%

Glacier National Park

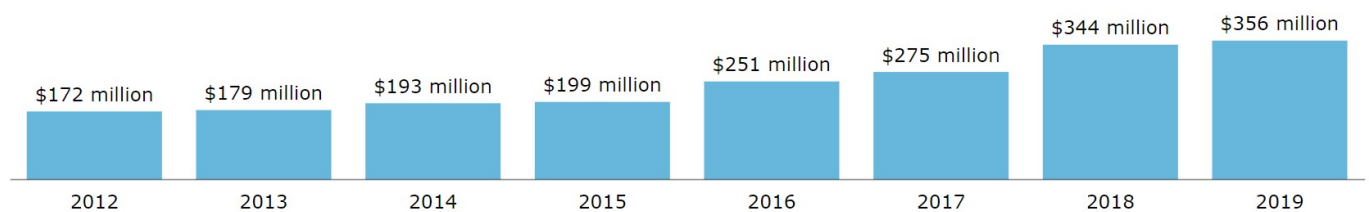
In 2019, 3.0 million park visitors spent an estimated \$356 million in local gateway regions while visiting Glacier National Park. These expenditures supported a total of 5,400 jobs, \$169 million in labor income, \$279 million in value added, and \$501 million in economic output in local gateway economies surrounding Glacier National Park.

☒ Visitor Spending ☐ Jobs ☐ Labor Income ☐ Value Added ☐ Economic Output

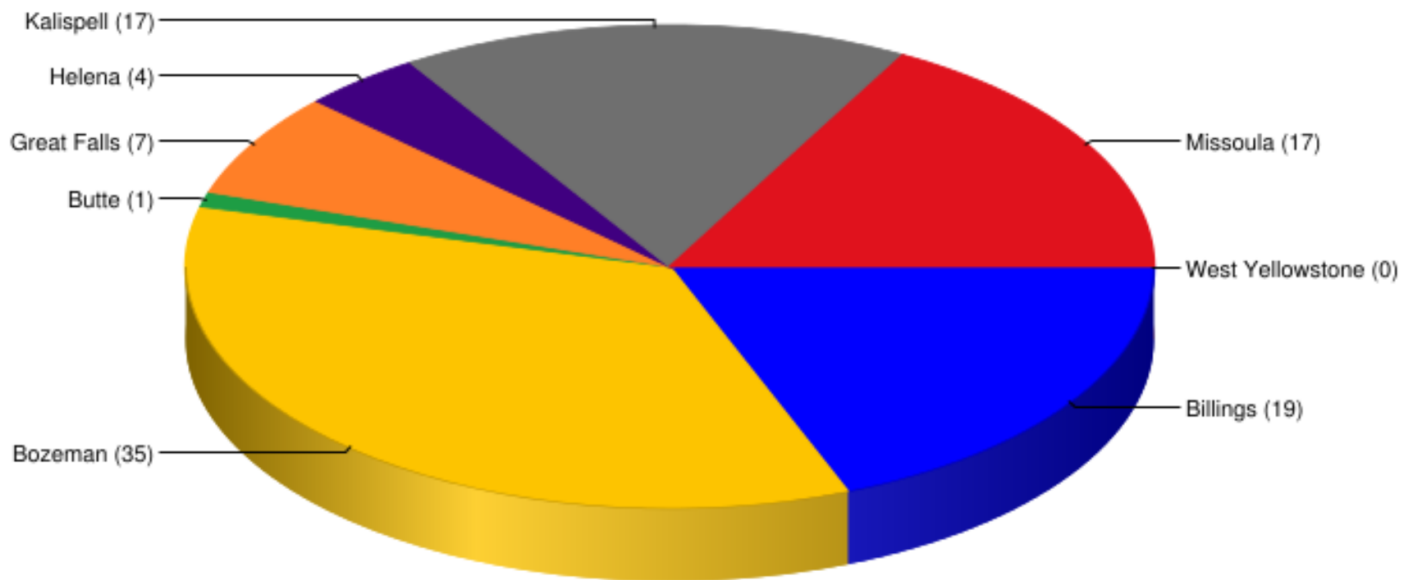
Click on a Park for more information or select a Park



Total Visitor Spending (Glacier National Park)



Percent of Total Deboardings by Location for Years: 2020



Data Source: Department of Transportation, Montana Aeronautics Division, Institute for Tourism and Recreation Research (ITRR)

2019 Montana Airport of Arrival Statewide Nonresident Expenditure Profiles

INSTITUTE FOR
TOURISM & RECREATION RESEARCH
UNIVERSITY OF MONTANA



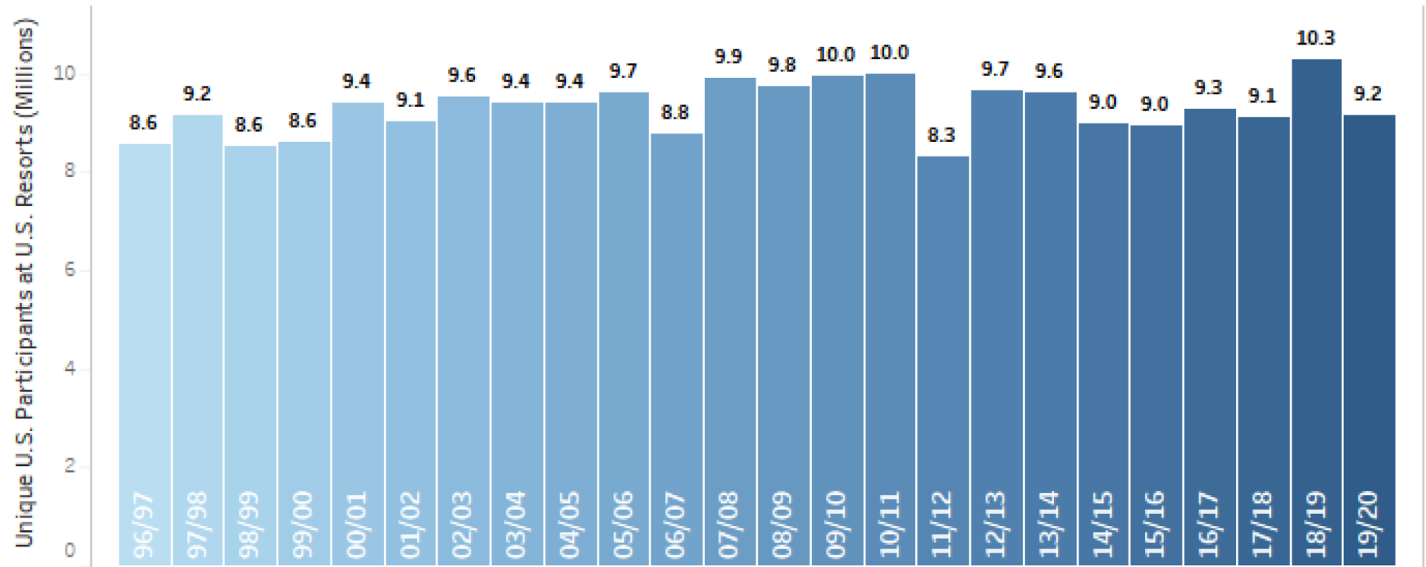
Avg. Daily Group Expenditures by Airport of Arrival¹ (Expenditures represent full trip in MT, not spending exclusively in arrival city.)

	Airport of Arrival in Montana ^{2,3}						
	All Fliers	Billings	Bozeman	Great Falls	Helena	Kalispell	Missoula
Sample size	1,301	259	463	106	63	227	226
Nonresident Travelers	1,466,000	287,000	513,000	118,000	70,000	252,000	250,000
Group Size (people/group)	2.10	1.57	2.60	1.80	1.51	2.17	1.84
Length of Stay (nights)	6.24	5.44	6.52	6.70	6.28	6.65	6.41
% of All Travelers in 2019	11.6%	2.2%	3.9%	0.9%	0.5%	1.9%	1.9%
Outfitter, Guide	\$51.72	\$31.92	\$69.94	\$19.08	\$5.50	\$24.66	\$21.38
Restaurant, Bar	\$49.18	\$31.75	\$56.12	\$35.51	\$41.74	\$47.21	\$46.01
Auto Rental	\$34.68	\$28.69	\$41.58	\$26.40	\$21.00	\$40.44	\$34.08
Licenses, Entrance Fees	\$25.83	\$4.52	\$59.11	\$9.57	\$4.49	\$19.83	\$11.68
Hotel, B&B, etc.	\$25.33	\$21.73	\$27.41	\$22.55	\$25.38	\$23.38	\$27.84
Retail Sales	\$20.88	\$13.23	\$19.73	\$15.95	\$17.22	\$16.40	\$18.76
Groceries, Snacks	\$12.72	\$9.64	\$14.93	\$11.47	\$6.26	\$14.26	\$11.09
Gasoline, Diesel	\$11.18	\$10.74	\$9.43	\$12.10	\$12.24	\$7.13	\$9.13
ntal Home, Cabin, Condo	\$10.22	\$2.75	\$19.59	\$2.32	\$1.56	\$10.78	\$4.90
Made in Montana	\$7.19	\$4.89	\$4.80	\$4.86	\$7.43	\$10.09	\$5.05
Misc. Services	\$1.37	\$1.05	\$13.01	\$0.51	\$2.26	\$3.35	\$4.04
Gambling	\$0.53	\$0.67	\$0.30	\$1.30	\$1.13	\$0.89	\$0.63
Farmers Market	\$0.30	\$0.10	\$0.22	\$0.11	\$0.21	\$0.52	\$0.27
Campground, RV Park	\$0.23	\$0.09	\$0.04	\$0.00	\$0.00	\$0.57	\$0.58
Transportation Fares	\$0.14	\$0.39	\$0.05	\$0.49	\$0.84	\$0.12	\$0.15
Vehicle Repair	\$0.04	\$0.00	\$0.00	\$1.05	\$0.92	\$1.96	\$0.07
Total Avg. Daily per Group	\$251.54	\$162.18	\$336.25	\$163.27	\$148.18	\$221.59	\$195.64
Estimate of Statewide Spending	\$991,570,000	\$110,870,000	\$492,920,000	\$56,350,000	\$28,400,000	\$162,240,000	\$137,640,000

¹Spending data are gathered via on-site surveys of nonresident travelers at airports, gas stations, and rest areas in MT. Travelers report 24 hours worth of trip expenditures. ²Spending data presented here are representative of expenditures in MT by traveler groups who flew into one of the listed airports. ³Butte and West Yellowstone airports had insufficient sample sizes for inclusion in this analysis.



Estimated Snowsports Participants: U.S. Visitors to U.S. Resorts, 1996/97 – 2019/20



Data Source: National Ski Areas Association (NSAA)