



Great Falls Montana

Comprehensive Travel Market Research

Presented: November 6, 2023

Final Report Submitted: November 21, 2023

RUDLOFF
SOLUTIONS

YOUNG
strategies, inc.



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Scope of Work

Great Falls Montana Tourism will work with Consultants to analyze and research Great Falls, Great Falls Montana Tourism, the local tourism industry, and the marketing of Great Falls to let the data, research, analysis, industry trends, and community input determine Great Falls, Montana's tourism future in accordance with Comprehensive Tourism Strategic Master Plan Proposal Attachment A.

Consultants will deliver to Customer:

- Comprehensive Tourism Strategic Master Plan for Great Falls, Montana.
- Supporting discovery, research, analysis, and data.
- An implementable road map with 1-, 2-, 3-, 4- 5-, 10-, 15-, and 20-year planning windows.
- Specific metrics to gauge progress by.
- Methodology to prioritize the resources to achieve the goals and objectives of the plan.



VISIT
Great Falls
MONTANA

Executive Summary

Project Overview

Strategic Master Plan Development

A Strategic Master Plan for Great Falls Montana Tourism will be developed based on the research findings and leader input reported in this document. The recommendations will include an analysis of the market and coordination with existing plans.

- **Vision, Mission and Core Values** for GFMT and the destination
- **Overall structure of GFMT Board and staff**
- **Brand Pillars and messaging** for future marketing
- **Future product/experience development**
- **Sustainability Assessment** including destination carrying capacity, workforce and livability.
- **Recommendations and conclusions** for improving Great Falls' competitive position, marketing, demand generators, product/destination development and ROI.
- **Recommended on-going research and KPIs** for tracking the implementation of the plan.
- **An Implementation Road map** with 1, 2, 3, 4, 5-year goals and targets for 10, 15 and 20 years.

Project Planning Team

Two experienced consultancies have come together to deliver comprehensive research-based strategic master planning for destinations across America and Great Falls, Montana! **Young Strategies** was incorporated in 2004 and has worked with 150+ destinations in 36 states. Darren Rudloff was a Young Strategies client while at Visit Cheyenne and formed **Rudloff Solutions** in 2020 to work in partnership with Young Strategies. Darren Rudloff's 30+ years of experience in providing visionary leadership to destinations is the perfect match with the Young Strategies team.

Project Timeline



STEP 1.

May 2023 - Project Kick-off and Team Familiarization to Great Falls

- Project Planning phone calls with GFMT staff to begin as soon as contract is signed
- Plan travel for reconnaissance and site visit
- Meetings in Great Falls with GFMT Staff and Board of Directors
- Project intro session(s) & interviews with leaders
- Begin building databases of leaders
- Collect all prior studies and plans within the region, synthesize for common threads & strategies

STEP 2.

Jun - Sep 2023 Lodging Market, Audience & Brand Research

- Refine methodology based on client & leader input
- Draft survey instrument
- Develop lodging & hotelier database
- Begin data source identification and collection of data
- Schedule survey deployment and response tracking
- Schedule focus groups
- Purchase STR, AirDNA - begin analysis of data
- Research report documents prepared with drafts submitted to GFMT

STEP 3.

Aug - Oct 2023 Meetings Research

- Refine methodology based on client & leader input
- Draft survey instruments
- Schedule survey deployment and response tracking
- Schedule meeting planner interviews
- Conduct facility assessment an analysis
- Research report documents prepared with drafts submitted to GFMT

STEP 4.

Sep - Oct 2023 DestinationNEXT

- Collect leader databases
- Deploy DestinationNEXT community leader self-assessment survey (4-6 weeks for data collection)
- Deep dive into prior studies and research
- Lead half-day planning workshops to review DestinationNEXT results and develop strategic priorities
- Prepare report documents of assessment and leaders input to be submitted to GFMT

Step 5. Strategic Planning

Nov - Dec 2023

- Consulting team will synthesize all data into a profile document
- Identification of unique themes, strategies and development projects
- Synthesize all data and leader input into a comprehensive strategic master plan
- Final Plan submitted to GFMT
- Plan presentations to community in January 2024

Constant communication and regular team meetings throughout the planning process with GFMT staff, strategic partners and City/County leaders is critical to success.



Great Falls - A Competitive Destination

Great Falls, Montana is a destination in the center of Montana that is also a gateway to a massive scenic region of the North American west. The third largest city in Montana, Great Falls has approximately 60,000 residents. The central Montana city is a 2.5-hour drive to Glacier National Park and 4.5 hours to Yellowstone National Park. Great Falls is accessible to travelers from Interstate Highway 15 and a state-of-the-art airport with four airlines providing gateway access from six different hub airports

Great Falls, Montana is a destination unto itself! An attractive riverfront city with a thriving downtown and a diverse array of year-round activities awaits individual and group travelers. Great Falls is not as well known as some other Montana destinations, but it has plenty of desirable attributes to become Montana's premier destination!

Great Falls is an active outdoors and sports destination! Located in the midst of 4 mountain ranges, 3 rivers, 2 wilderness areas and 1 wildlife refuge, adventure is easily accessible in every direction. 53 miles of scenic trails run along the famed Missouri River that goes right through the downtown. Visitors can play golf, disc golf, horse-shoes, soccer, basketball, tennis, and other competitive sports in addition to hiking, running, cycling, hunting, fishing, boating and more.

Great Falls is an amazing arts, culture and heritage destination! Eleven museums and over 25 wall murals that make the downtown Montana's biggest art gallery. Famed Western artist Charles M. Russell called Great Falls home. His studio, home, and many of his works of art are found in a world class museum. The Lewis and Clark Interpretive Center tells the story of America's greatest explorers from its riverfront location among the waterfalls. Venues for music, dance and theater provide great evening entertainment.

Great Falls is a dining and shopping destination! A shopping hub for central Montana, Great Falls welcomes in-state visitors every week of the year.



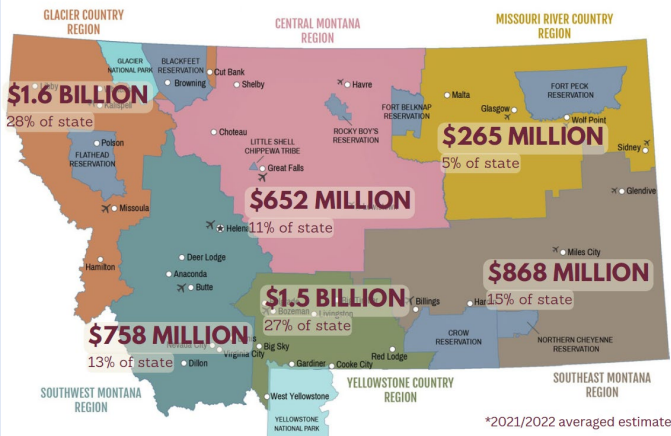


Destination Exploration & Analysis – Tourism Economic Impact

Cascade County Summary:

- Central Montana generates 11% of statewide visitor spending. Over half of that is generated in Cascade County (6% of state).
- Cascade County visitor spending (\$355M) ranks fifth among 56 counties in Montana.
- Tourism in Cascade County:
 - 3,080 jobs
 - \$80.09M Annual Payroll
 - \$3.25M State & Local Taxes

\$5.68 billion* in Montana



Source:



2022 Central Montana Region Tourism Economic Impact



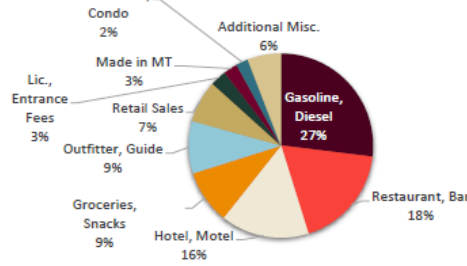
2022 Nonresident Traveler Expenditures & Economic Contribution in Central Montana Travel Region

Table 1 - Total Nonresident Spending in Central Montana*,\$

Gasoline, Diesel	\$175,779,000
Restaurant, Bar	\$119,068,000
Hotel, Motel	\$101,077,000
Groceries, Snacks	\$61,561,000
Outfitter, Guide	\$59,823,000
Retail Sales	\$48,197,000
Lic., Entrance Fees	\$18,553,000
Made in MT	\$16,178,000
Rental Cabin, Condo	\$13,871,000
Auto Rental	\$13,698,000
Misc. Services	\$8,878,000
Campgrnd, RV Park	\$7,202,000
Gambling	\$4,189,000
Vehicle Repairs	\$3,333,000
Farmers Mkt	\$746,000
Transp. Fares	\$240,000
TOTAL	\$652,393,000



Percent of Nonresident Travel Spending in Central Montana



2022 Contribution of Nonresident Traveler Expenditures in Central Montana Travel Region

- 2022 estimates of spending in Central Montana by nonresident visitors to the state totaled over \$652 million.
- This \$652 million in local spending directly supports \$583.4 million of economic activity in the region, and supports an additional \$318.6 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$902 million.

Table 2 - 2022 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	\$583,387,000	\$183,493,000	\$135,120,000	\$902,000,000
Employment (# of jobs)	5,689	970	883	7,543
Employee Compensation	\$140,405,000	\$40,203,000	\$36,457,000	\$217,065,000
Proprietor Income	\$16,013,000	\$8,105,000	\$5,104,000	\$29,222,000
Other Property Type Income	\$54,132,000	\$22,667,000	\$26,890,000	\$103,689,000
State & Local Taxes ^A	\$21,678,000	\$27,876,000	\$13,754,000	\$63,308,000

Direct impacts result from nonresident traveler purchases of goods and services; **indirect impacts** result from purchases made by travel-related businesses; and **induced impacts** result from purchases by those employed in travel-related occupations. **Industry Output** is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends. ^AData is collected at the state level. In 2022, several categories had insufficient sample size for regional breakout. ⁰Expenditure category totals may not add to overall total due to rounding. ^A Comparison to previous years is not advised.

2022 Cascade County Tourism Economic Impact



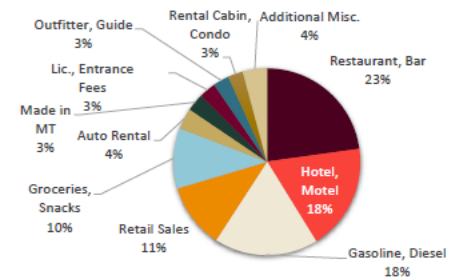
2022 Nonresident Traveler Expenditures & Economic Contribution in Cascade County

Table 1 - Total Nonresident Spending in Cascade County*,\$

Restaurant, Bar	\$81,074,000
Hotel, Motel	\$65,385,000
Gasoline, Diesel	\$63,831,000
Retail Sales	\$39,954,000
Groceries, Snacks	\$36,954,000
Auto Rental	\$12,996,000
Made in MT	\$10,867,000
Lic., Entrance Fees	\$10,390,000
Outfitter, Guide	\$9,775,000
Rental Cabin, Condo	\$9,330,000
Misc. Services	\$5,302,000
Campgrnd, RV Park	\$4,114,000
Vehicle Repairs	\$2,932,000
Gambling	\$1,982,000
Farmers Mkt	\$290,000
Transp. Fares	\$240,000
TOTAL	\$355,417,000



Percent of Nonresident Travel Spending in Cascade County



2022 Contribution of Nonresident Traveler Expenditures in Cascade County

- 2022 estimates of spending in Cascade County by nonresident visitors to the state totaled over \$355 million.
- This \$355 million in local spending directly supports \$284 million of economic activity in the region, and supports an additional \$181 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$465 million.

Table 2 - 2022 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	\$284,439,000	\$94,038,000	\$86,794,000	\$465,271,000
Employment (# of jobs)	3,080	562	570	4,213
Employee Compensation	\$80,092,000	\$25,156,000	\$25,154,000	\$130,402,000
Proprietor Income	\$9,929,000	\$3,432,000	\$2,669,000	\$16,030,000
Other Property Type Income	\$36,781,000	\$12,608,000	\$17,056,000	\$66,445,000
State & Local Taxes ^A	\$3,245,000	\$2,598,000	\$3,058,000	\$8,901,000

Direct impacts result from nonresident traveler purchases of goods and services; **indirect impacts** result from purchases made by travel-related businesses; and **induced impacts** result from purchases by those employed in travel-related occupations. **Industry Output** is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends. ^AData is collected at the state level. The two-year average of expenditures (2022 \$s) was used to help account for small and varying sample sizes at the county level. ⁰Expenditure category totals may not add to overall total due to rounding. ^A Comparison to previous years is not advised.



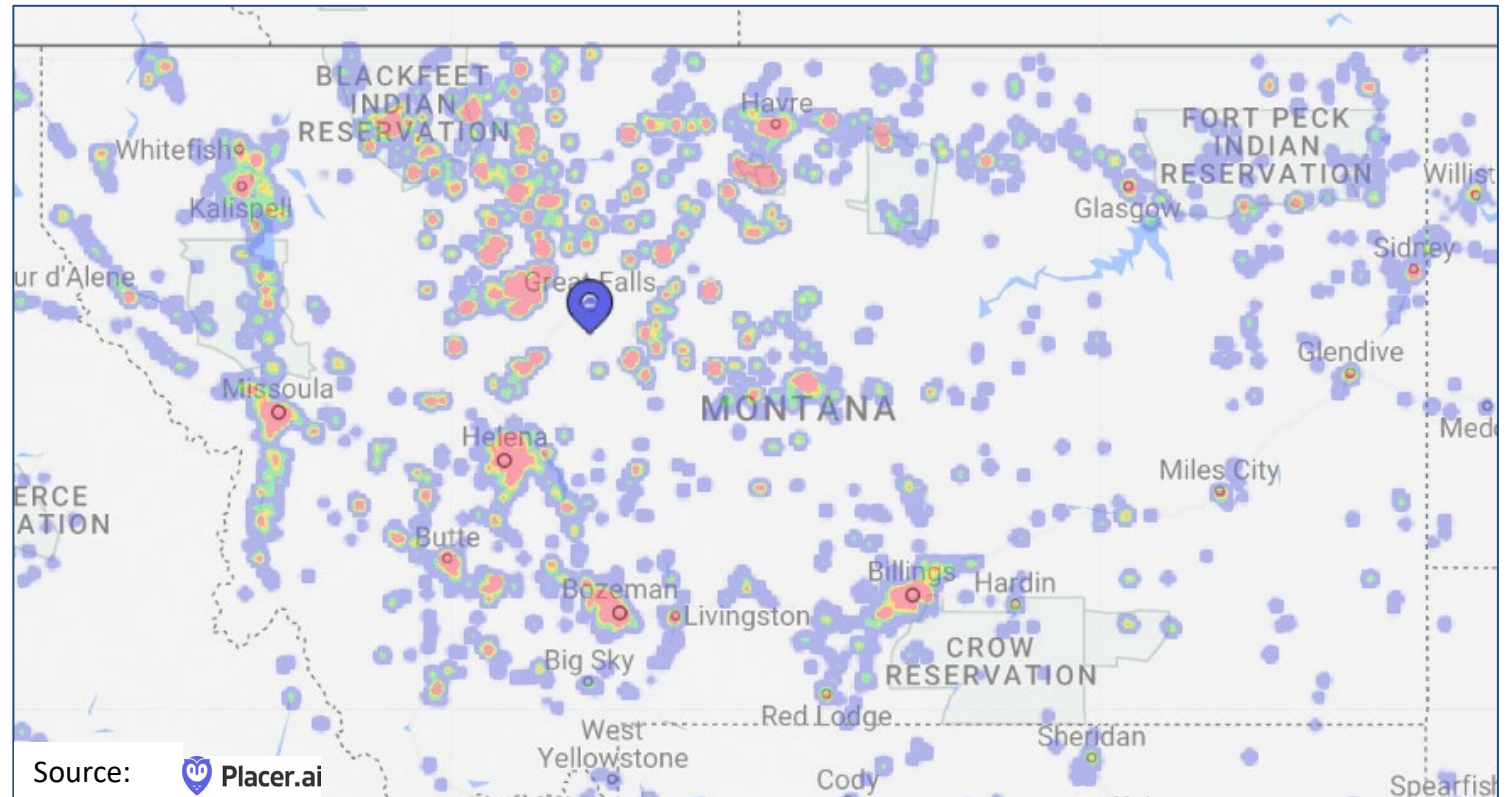
Geolocation Data Methodology:

- The YSI/RSI consulting team procured data from two geolocation sources to provide visitor profile and behavior analysis for Great Falls: Placer.ai & Zartico. Geolocation data uses the IP address of electronic devices to determine their location and movement. The data reveals the points of origin of the devices and the places they visited in Great Falls, the duration of the visit and the sequence of the places visited.
- **Placer.ai** provides machine learning-powered human mobility insights in an interactive dashboard. Gathering data from a panel of mobile devices nationwide, Placer.ai’s Foot Traffic Dataset helps clients understand the visitation at a specific site or area – how many people visit, types of visitors, and traits of the visit (when they visit, how long they stay, and how often they return).
- **Zartico** solely focuses on travel destination analytics and advanced data insights that allow destinations to understand the “why” and prepare for “what’s next.” Zartico’s platform ingests the world’s largest commercially available stream of geolocation data layers it with credit card spending data and event data to paint a complete picture of your destination.
- Geolocation data is used by all type of retail and service businesses around the world. These data sets are not unique to the travel industry nor to Great Falls Tourism. Identifying information is stripped from the data so privacy concerns are alleviated.

Observations:

- Geolocation data for Great Falls in 2022 reveals the diversity of visitor types to Great Falls.
- The data reveals that residents in nearby Montana markets are frequent repeat visitors to Great Falls as the city is their business, agricultural, retail, dining and healthcare hub.
- Visitors from within 250 miles account for about 58% of total visits to Great Falls tracked in 2022.
- Top MT source zip codes for *visits*: Havre (3.7%); Browning (2.8%); Concord (2.2%); Helena (2.2%); Missoula (2.1%); Helena (2.0%); Lewistown (1.9%); Box Elder (1.8%). Source: Placer.ai

Map of 2022 Visitors to Great Falls From Montana





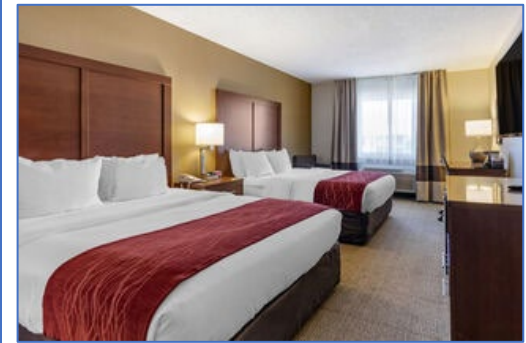
Great Falls Lodging Market Analysis

Methodology

- **STR Data for Great Falls** - Young Strategies/Rudloff Solutions purchased lodging data from STR for the hotel/motel properties located in Great Falls, MT in the form of an 8-year trend report, including 365-daily data, for all STR-participating hotel/motel properties. **STR receives data from 21 hotels in Great Falls representing 85% of the rooms in the market.**
- **Survey of Lodging Managers** - Young Strategies, Inc. (YSI) and Rudloff Solutions (RS) conducted a survey of the hotel/motel properties located in Great Falls, MT. The online questionnaire was sent to the database of hotel/motel lodging managers in Great Falls who were asked to estimate the following key metrics for the full calendar year 2023 (projected): percentage of occupancy driven by 8 market segments and annual occupancy. Lodging surveys were collected in October 2023.

Summary of Findings

- Great Falls hotel/motel lodging supply (32 hotels, 2,375 rooms) has increased 14.5% in the past 8 years, while demand has outpaced supply slightly faster (16.3%).
- 2022 Great Falls occupancy rate was 61.2% compared to national 62.7%.
- Great Falls occupancy rate trailed the national occupancy rate by 3-7% 2015-2019.
- Great Falls lodging pandemic recovery was faster-paced than the national average and now trails the national average by only 1.5%.
- Highest monthly occupancy usually occurs in June - September. November-December have the lowest occupancies, along with January, February, and April. The Western Art Week provides a nice boost to March showing the power of events during slow periods.
- Sunday nights typically run the lowest occupancy (43%) while Fridays are highest (62%).
- Both mid-week and weekend period show solid occupancies of over 60%.
- The potential for significant growth with groups can only happen in the winter months, as the market lacks capacity from May to October.
- Great Falls is currently a transient lodging market, far-more-so than a group market.
- The segmentation survey data herein reveals the majority of rooms (71.7%) are driven by transient demand with downtown hotels garnering more transient business than the airport corridor.
- Business transient is the largest single segment overall and in the two geographic subsets.
- The lodging data reported herein confirm that demand is present in the market to necessitate the development of new lodging that is underway at the end of 2023.





Methodology

An online survey instrument was developed and prepared for distribution by the YS/RS research team and approved by VGF. The survey was deployed through web-links provided to VGF and their industry partners. Additionally, a panel of respondents was procured from across the United States & Canada. The data on this page reveals the demographic profile of the visitor survey respondents. 1,541 completed visitor surveys were analyzed and included in this report.

Survey Respondent Demographics

- Average age: 39.4 years old. Range: 18 – 80
- Female 54%, Male 46%
- Education: 74% have some college education.
- Occupations: Professional, retired, self-employed
- Household income: \$50-\$99K = 41%; \$100K - \$200K = 26.4%
- Ethnicity: white/Caucasian=67%; Hispanic/Latino=18.7%; African-American = 13.5%
- Point-of-origin: all 50 states & Canada; Top states= MT, ID, OR, WA, AZ, CA, CO, TX, SD

Desired type of travel destinations: Mountains, lakes, beach, National Park, Active outdoors

Top desired activities: Nature/scenery site seeing, accessibility, Outdoor recreation, arts/culture

Typical travel party to Great Falls: 2 or 4 people, mostly adults without kids, traveling by car

First-time visitors = 1/3; Repeat visitors 2/3

Main trip purpose: getaway/long weekend with family/friends, visiting friends/family (MAFB)

Length of stay = average 3 nights

Average Spending per travel party: \$1,495

Top activities in Great Falls: Shopping, nap, scenic drive, wildlife watching, craft beverage, picnic, museums, hiking, swimming, camping, art galleries, festivals/events

Top attractions: The Falls/dam, Lewis & Clark IC, First people BJ, Giant Springs SP, Children’s Museum, Tower Rock, The History Museum, River’s Edge Trail, Smith River SP, Paris-Gibson, Sip n’ Dip, CM Russell Museum





Top activities outside of Great Falls: Yellowstone NP, Glacier NP, Billings, Bozeman, Helena

Trip satisfaction: 4.5 on a 5-point scale (very high).

Highest rated amenities: Variety of Outdoor experiences, unique local dining, lodging value



LAST NIGHT in GREAT FALLS –Impact from Overnight Stays

	31 LODGING PROPERTIES with 2,292 HOTEL ROOMS 61.2% ANNUAL OCCUPANCY (STR)	➔	1,403 rooms occupied
	Average daily rate = \$116.87 (STR)	➔	\$163,969 Average lodging revenue per night
	Average travel party size = 3.6 PEOPLE (YSI/RS visitor survey)	➔	Average overnight visitor count in hotels in Great Falls per night = 5,051
	Average spending per person, per visit = \$115 (YSI/RS visitor survey)	➔	\$580,865 Average daily expenditures
VISITOR SPENDING ESTIMATE PER NIGHT IN GREAT FALLS =			
\$580,865			
ANNUAL OVERNIGHT VISITOR SPENDING ESTIMATE IN GREAT FALLS =			
\$212,015,725			



Purpose

To conduct a meeting planner survey for Visit Great Falls to identify decision making patterns between definite meeting planners, prospect meeting planners and lost meeting planners.

Methodology

A comprehensive online survey instrument was prepared by the Young Strategies research team to capture comparative data between those that are definite meeting planners, prospect meeting planners, or lost meeting planners for Visit Great Falls. Email recipients were invited to take a survey and once completed were able to download a \$5 gift card to either Starbucks, Amazon, or Target. Recipients were also entered into a chance to win a grand prize \$200 VISA gift card.

The survey was deployed to 281 meeting/event planners in a database provided by Visit Great Falls. 72 meeting/event planners responded to the survey 26%.

A broad range of survey responses were received from definite, prospect, and lost meeting planners and is deemed to be predictive of overall meeting planner patterns for Visit Great Falls. Survey response data was compared to prior similar meeting/event planner research conducted for Visit Great Falls.

Summary of Findings

Among respondents currently booking in great falls:

- Most Great Falls meetings are in the Education (47%), Corporate (21%), and Arts/Culture (18%) sectors.
- Great Falls meetings are relatively small with 58% having under 100 attendees.
 - Under 50 attendees 33%
 - 51-100 attendees 25%
 - 101-200 17%
 - 201-500 14%
 - Over 501 11%
- Board meetings account for 56% of the reported meetings.
- Respondents report use all types of properties in Great Falls – full-service hotels, limited service, concert venues, event facilities, museums, etc.
 - 69% of meeting planners currently booking in Great Falls are extremely or very likely to book in GF again.
- Top competitors for Great Falls are Billings, Missoula, and Bozeman.
- The majority of the Great Falls meetings business is from MT.
- Some respondents desired another large convention hotel option.





Survey Response Summary n=485

Methodology

An online survey instrument was developed and prepared for distribution by the YS/RS research team and approved by VGF. The survey was deployed during the two days of strategic planning workshops held in Great Falls November 6 – 8, 2023 to a curated target demographic sample of likely future visitors. The data in this report section reveals the images and messaging that is most likely to attract future visitors to Great Falls, MT. Survey response = 485 completed surveys.

Survey Respondent Demographics

Point-of-origin: United States – 88% & Canada 12%

Top states= MT-34%, WA-13%, CO-12%, AZ-9%, NV-9%, UT-9%, WY-9%, MN-5%.

How many Leisure getaways a year: 1-2=70%, 3-5=23%

Top states in terms of destination appeal: CO, MT, WY, UT, ID.

Types of destination that appeal most: Beach, lake/river, mountain, National Park, Active outdoors.

Desired activities: River, riverfront city, casino, hiking, family-friendly, all-inclusive, waterpark

Words to describe Montana: Mountains, beautiful, big, Yellowstone, glacier, outdoors, beauty.

Best known cities in Montana (open ended): None, Billings, Bozeman, Missoula, Helena, Butte, Kalispell, Great Falls (7th), Yellowstone, Whitefish, Glacier, Flathead Lake.

Familiarity with Great Falls: Heard of it, never been-45%, been there-37%, never heard of it-18%.

Words to describe Great Falls: water, waterfalls, river, mountains, beautiful, nature, city.

Which words or phrases inspire you to visit Great Falls: waterfalls, summer outdoor activities, outdoor activities, fairs/events/festivals, riverfront city, evening entertainment, eleven museums, Lewis and Clark



Methodology

DestinationNEXT is a comprehensive stakeholder tool to help travel organizations strategically evaluate their destinations. The online diagnostic tool allows leaders to participate in an objective self-assessment of the destination and identify priorities and strategies for planning. The DestinationNEXT assessment tool is a comprehensive online survey based on 24 variables related to destination strength and community alignment. The twenty-four variables have been identified in the past three destination futures study conducted by NEXTFactor, Inc in partnership with Destinations International. The survey was distributed to a wide swath of community leaders with 91 leaders responding.

- Destination is in the Explorers quadrant with below average scores for alignment and below average scores for strength.
- Different stakeholder groups have different perceptions of Great Falls.
- There are several opportunities for improvement in Great Falls as per the lowest rated statements shown:

Opportunities for Improvement

Destination Strength

	Statement	Performance ▲
1.	Variety of public transportation options	2.38
2.	Limited issues with homelessness	2.52
3.	Diverse and high-quality shopping opportunities	2.54
4.	Safe from crime	2.55
5.	Known as a walkable destination	2.65

Destination Alignment

	Statement	Performance ▲
1.	Adequate affordable housing for workers	2.32
2.	Affordable childcare options for workers	2.43
3.	Adequate workforce for frontline hospitality jobs	2.45
4.	Adequate workforce for management jobs	2.55
5.	Adequate customer service training	2.60



Destination Exploration & Analysis



Great Falls - A Competitive Destination

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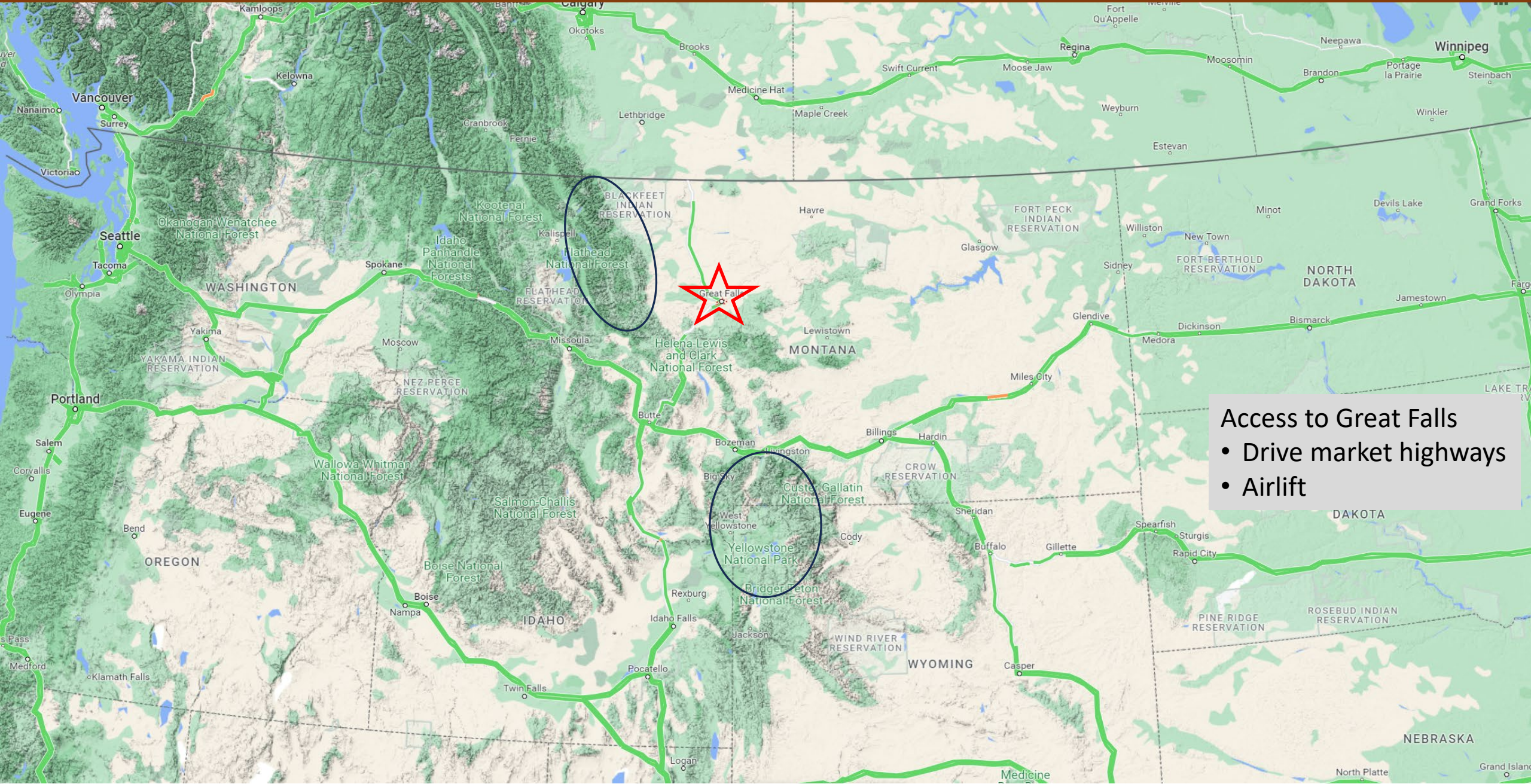
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Destination Exploration & Analysis - Location

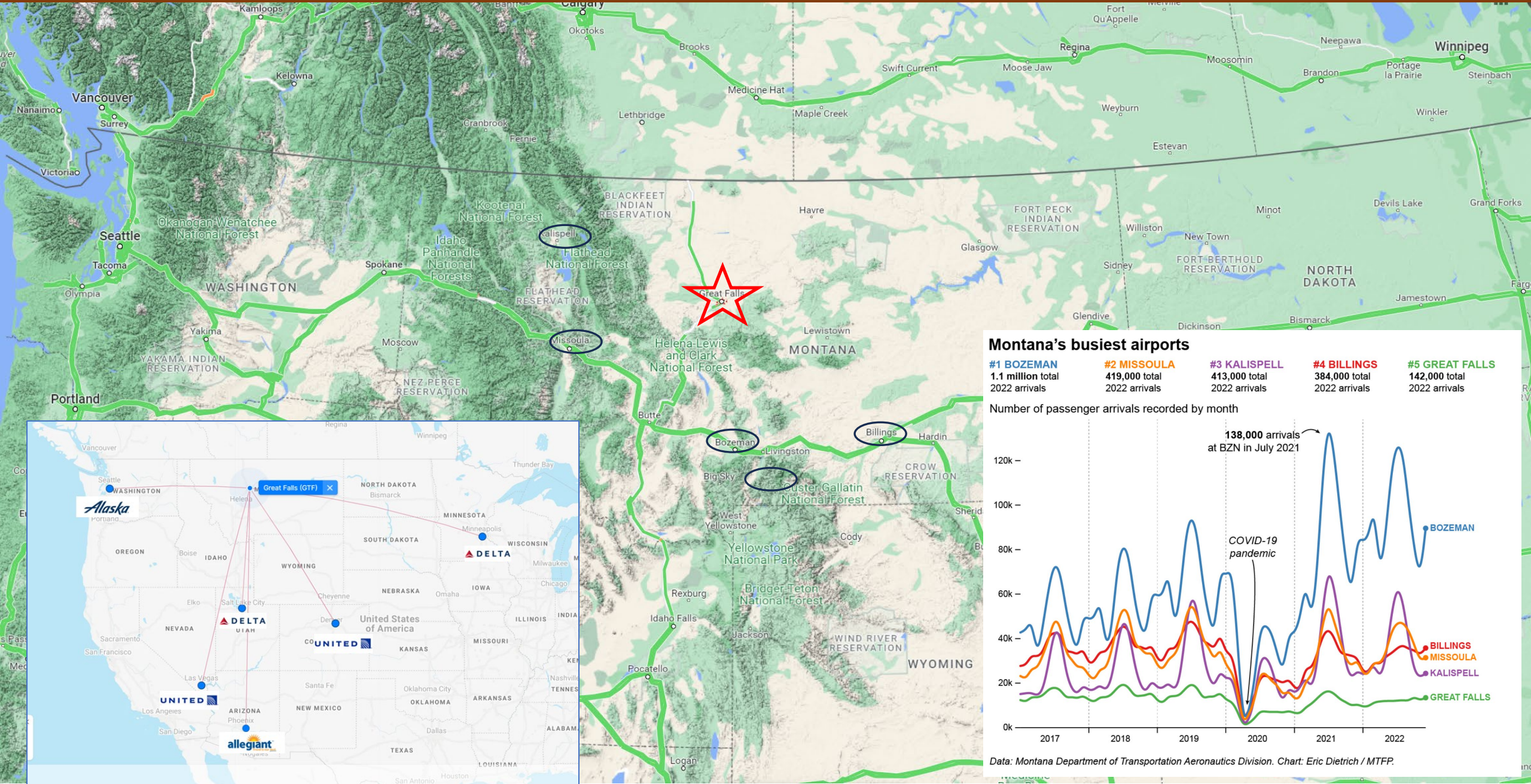


Access to Great Falls

- Drive market highways
- Airlift



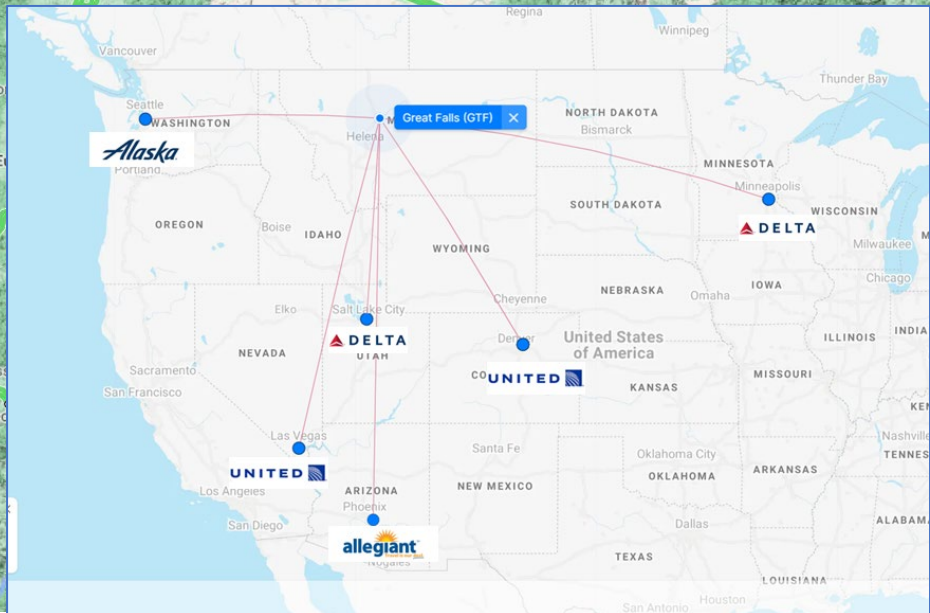
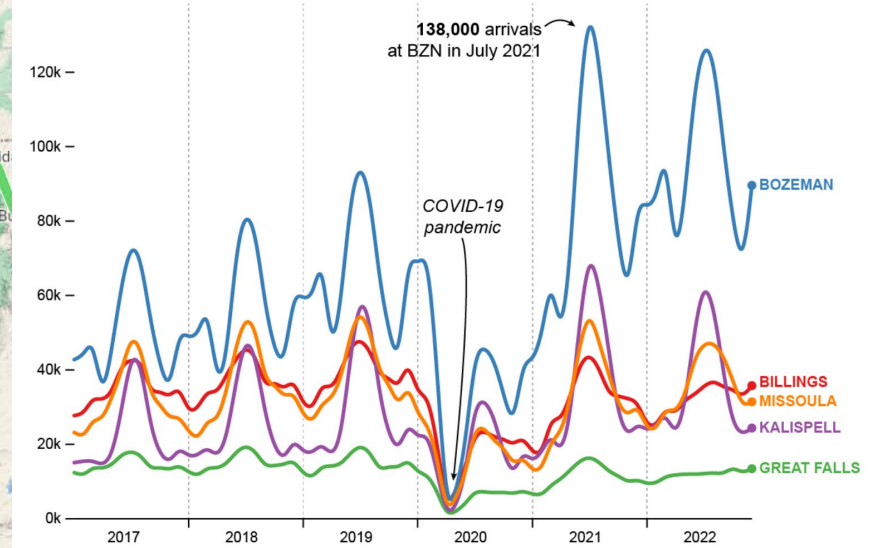
Destination Exploration & Analysis - Gateways



Montana's busiest airports

Rank	Airport	Total 2022 Arrivals
#1	BOZEMAN	1.1 million total 2022 arrivals
#2	MISSOULA	419,000 total 2022 arrivals
#3	KALISPELL	413,000 total 2022 arrivals
#4	BILLINGS	384,000 total 2022 arrivals
#5	GREAT FALLS	142,000 total 2022 arrivals

Number of passenger arrivals recorded by month

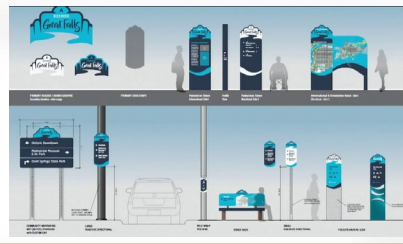


Data: Montana Department of Transportation Aeronautics Division. Chart: Eric Dietrich / MTFP.



Gateways / Signage

- Four Interstate -15 exits
- US Highway 87/89
- Great Falls International Airport – five
- Wayfinding signs installed beg. 2022
- VGF Info Center 15 Overlook Drive



Attractions – Outdoor Parks & Activities

- Waterfalls and Dams – Black Eagle Falls, Colter Falls, Crooked Falls, Cochrane Dam, Memorial Falls, Morony Dam, Rainbow Falls
- Missouri River
- River’s Edge Trail – 53 miles of scenic trails
- Downtown Murals – 25 wall murals
- Giant Springs State Park - #1 MTSP, Spring & hatchery
- Gibson Park – premier city park access to River Trail
- Montana Veterans Memorial
- Riverside Railyard Skate Park
- Roe River – The worlds shortest river
- Sluice Boxes State Park - canyon with cliff trails
- The Great Buffalo Hunt – painted bison displayed throughout the city

Attractions Outdoor Sports

- Anaconda Hills Golf – 18-hole scenic, historic golf
- Eagle Falls Golf 1953 – riverfront 18-hole golf course, challenging, scenic
- Great Falls Trap and Skeet
- Showdown – Montana’s first ski hill
- Silver Crest Recreation Area – ski trails for cross country and snow-shoeing

Attractions – Indoor

- Black Eagle Community Center – bowling in historic building with scenic river views.
- Brush Crazy – hands-on art center
- Escape the Falls – escape rooms
- Habit Yoga – classes & retail
- Hi-Line Climbing Center – indoor, no-ropes, 15” high family activity



Museums

- **CM Russell Museum** – Charlie Russell’s art displayed in a state-of-the-art museum, original art studio, and Nancy and Charlie’s home are all on the campus of the C.M. Russell Museum.
- **Childrens Museum of Montana** – Montana’s premier hands-on, learning experience for kids provides a fun time for visiting families.
- **First People’s Buffalo Jump State Park** – a short drive southwest of the city takes visitors to this state park with a museum at the gathering spot for thirteen tribes for the last 700 years!
- **Lewis & Clark Interpretive Center** – a huge modern museum on a scenic river bluff tells the story of Lewis and Clark’s exploration of the American west with amazing artifacts and the story of the Great Falls portage.
- **Malmstrom AFB Museum & Air Park** – The words “Call ahead to make an appointment” are frustrating for most travelers and limit access to this amazing museum inside the MAFB security zone. The history of every mission at Malmstrom Air Force Base as well as a large exhibit regarding the current minute man missile mission are depicted here.
- **Montana Museum of Railroad History** – located on the Grounds of Montana Expo Park you can find displays of railroad history and model trains. Open two days a week for two hours each.
- **Paris Gibson Square Museum of Art** – an impressive contemporary art collection displayed in the city’s original school building.
- **Sun River Historical Society Fort Shaw** - located in Fort Shaw, MT a former military installation, housing an Indian Reformatory School, then a public school.
- **The History Museum** – telling the history of Great falls and Cascade County through exhibits with artifacts, this museum is entertaining and has archives for research and a retail shop for gifts.
- **The Ursuline Center** – a history museum with the story of this educational institution and the Ursuline sisters who ran it offers a tour of Mother Raphael Schweda’s studio in the tower where scenic views of the city area a bonus.



Experiences / Activities

- Cultural – visual arts
- Cultural – performances theatre
- Cultural – performances music
- Cultural – history/heritage
- Events – fairs, festivals, exhibitions, competitions, rodeo, races
- Sports (team) – baseball, basketball, volleyball, field sports
- Sports (individual) trails - cycling, running, walking, hiking, golf
- Outdoors – Hunting, fishing, floating/paddling the river, ATV & trail riding

Event/Group Facilities – Indoor & Outside

- Montana ExpoPark – multiple facilities arena, track, exhibition space, etc.
- Electric City Speedway
- Great Falls Ice Plex
- Centene/Voyagers Stadium
- Great Falls College Athletic & Event Facilities
- University of Providence Athletic & Event Facilities
- The Newberry
- The Mansfield Theater
- Anaconda Hills Golf
- Eagle Falls Golf Course

Meeting/Indoor Event Facilities

- **Pacific Steel & Recycling Arena:** 33,000 sf arena suitable for rodeos, basketball games, major trade shows, banquets.
- **Expo Park Exhibition Hall:** 15,000 sf of open event and trade show space. 15 other rooms, primarily suited for agricultural displays and events.
- **Great Falls International Airport Event and Conference Center:** Attractive space on the 2nd floor at the Airport. Large meeting/events room provides attractive views of the airport runway and surrounding area. Also, a large room suited for dining / receptions. 2 small rooms as well. Not near sizeable lodging properties.
- **Holiday Inn:** 7 meeting rooms totaling 7,500 sf. Largest room is 4,365 sf. Older mtg space in design and features. Hotel has 168 rooms.
- **Heritage Inn:** 2 large open meeting / event spaces in internal atriums of the property. The largest is 9,900 sf. The internal atriums are surrounded by sleeping rooms on 2 levels which open into the atrium. Older space in design and features. Hotel has 230 guest rooms.
- **Mansfield Convention Center:** Open events space totaling 15,300 sf. Can be divided with panels / pipe and drape. Located in City Hall complex downtown, adjacent to Mansfield Theater. 8 other meeting rooms. Not near sizeable lodging properties.
- **Ursuline Conference Centre and Museum:** Small meeting space in a church dorm setting. Perfect for religious camps, quilting shows, craft shows.
- **Limited-Service properties:** Most have 1-5 mtg rooms suitable for retreats, boards, and other small meetings.

Lodging - Hotel / Motel – 2,375 Rooms

• Alberta Motel	26
• Best Resting Mot	33
• Best Western Plus Riverfront	92
• Central Motel	28
• Comfort Inn	64
• Comfort Inn & Suites Marketplace	88
• Crystal Inn & Suites	86
• Days Inn	60
• Extended Stay America	104
• Great Falls Inn	60
• Grizzly Inn	110
• Hampton Inn	97
• Heritage Inn	230
• Hilton Garden Inn	118
• Holiday Inn Express	85
• Holiday Inn Convention Center	168
• Hotel Arvon	33
• Imperial Inn	30
• Mid-Town Motel	39
• Motel 6	59
• O'Haire	68
• Plaza Inn	26
• Royal Motel	22
• Ski's Western Motel	25
• Sleep Inn	48
• Mainstay Suites	42
• SpringHill Suites Great Falls	132
• Staybridge Suites	113
• The Gibson	44
• Travelodge	104
• Wingate	62
• Malmstrom Inn & Suites	83



Motivational Assets – “Hooks”

- Waterfalls!
- Riverfront town center
- Active outdoor lifestyle
- Dynamic, riverfront town with lodging, retail and dining
- Lewis & Clark
- Arts, culture, heritage
- Gateway to National Parks

Positioning Themes

- Prior - Basecamp & Dam
- New – This and That - The campaigns will portray all sides of GF from outdoor adventure to art, from fine dining to burgers, from craft cocktails to draft beer, from do it all to do nothing.



VISION

Be THE place in Montana to visit for a genuine experience.

MISSION

Strengthen our economy by promoting the uniqueness of Great Falls, Montana to visitors.

VALUES

Authentic | Innovative | Bold | Accountable | Respectful | Passionate | Results Focused | Trusting | United | Honest

Funding for Tourism Promotion FY24

3% tax on lodging	\$213,436	(19%)
TBID Assessment	\$765,508	(68%)
Reserves	\$133,600	(12%)
<u>Membership</u>	<u>\$10,000</u>	<u>(0.9%)</u>
Total FY24 REV Budget	\$1,122,544	(100%)

Expenditures FY24

			Nat. AVG
Personnel	\$276,904	(25%)	25-45%
Admin	\$116,450	(10%)	10-15%
<u>Marketing & Sales</u>	<u>\$729,190</u>	<u>(65%)</u>	<u>50-65%</u>
Total FY24 EXP Budget	\$1,122,544	(100%)	

Staffing

Rebecca Engum, CDME – Executive Director
 Shannon Newth – Content Director
 Kali Jean Tuckerman – Sales Director

Tourism Promotion

- Great Falls Tourism
- <https://visitgreatfallsmontana.org>

Great Falls Tourism Objectives in FY24 :

1. Generate stays at Great Falls lodging properties.
2. Increase return overnight visits and trip extensions.
3. Increase room demand during Western Art Week.
4. Increase number of mimosas sold during Mimosa Showdown.
5. Create alliances with champion-led efforts.
6. Increase direct flights to Great Falls.
7. Determine Great Falls’ competitive advantages to grow tourism and expand the community’s opportunities and competitiveness to attract visitors overnight.
8. Increase the number of Convention and Visitors Bureau members.
9. Maintain a highly functioning, accountable, mission focused, organization with educated staff and informed Directors, members, and partners.





Great Falls Tourism Publications

Great Falls Visitor Guide. Montana's Basecamp:

Professionally done visitor guide. Comprehensive. Nice section on how to Recreate on the River including Level of Difficulty, Access Points, and Outfitters/Shuttles. Itineraries and Scenic Byways drives are long – 100-200 miles. Dam map is great, but missing more maps to show where local and regional attractions are in relation to the city.

Great Falls MT Tourism Website – Leisure-oriented website aimed at leisure visitors. New website so it may be in transition. Regional attractions like Glacier and Yellowstone are included in “Things to Do” but not highlighted. Lacks Convention / Meetings section. Lacks Media Resources / Photos / PR options. Doesn't highlight how to access the river.

River's Trail Edge brochure/map – Comprehensive and attractive map / guide of the River's Edge Trail network. Includes attractions along the way and details about the types of trails. Includes helpful trail manners, loop tours, parking info, with more info available via a website.

Great Falls Rack brochure – Montana's Basecamp for Art and Adventure brochure. Concise, attractive pocket brochure of top attractions, outdoor activities, lodging, and dining.

Explore the Great Falls of the Missouri – Brochure describing the falls, the River's Edge Trail, and attractions along the river.





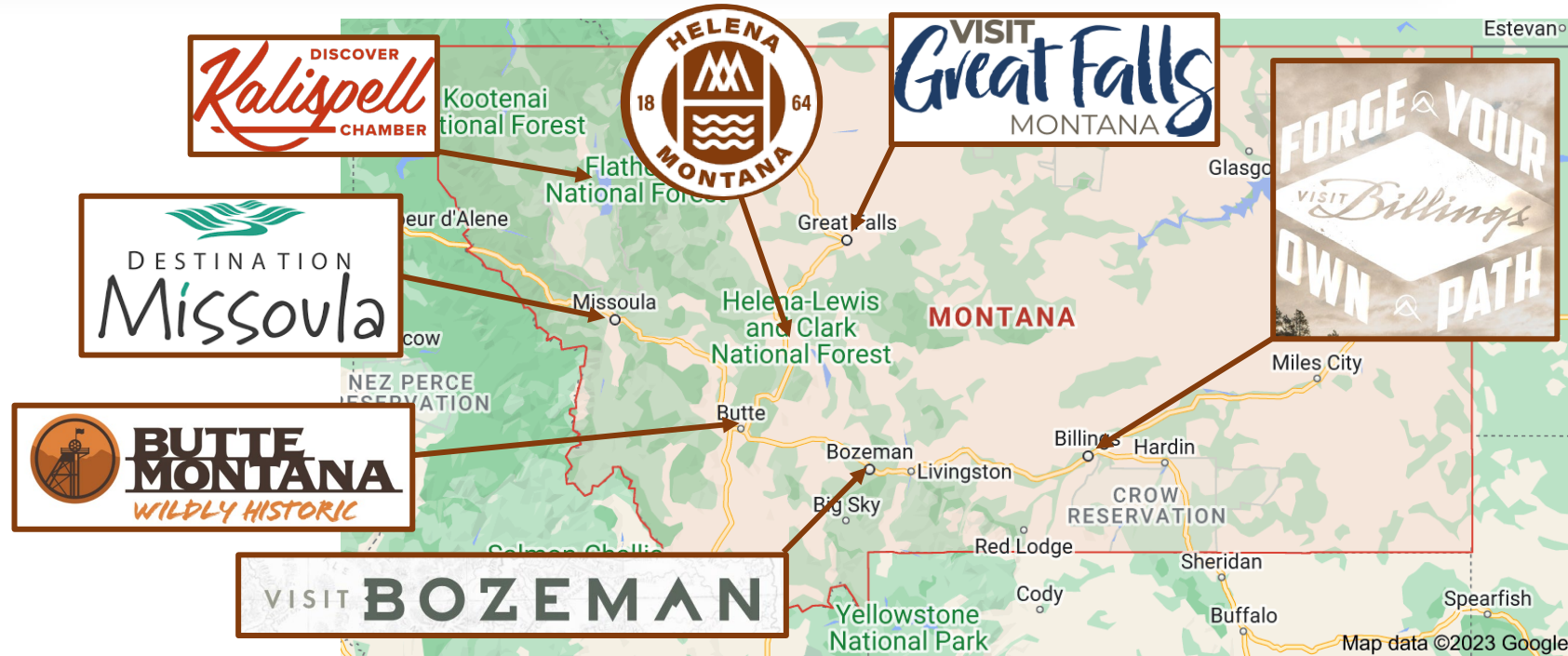
Destination Exploration & Analysis – Competitive Assessment

Rank	County/City DMO	Visitor Spending	Population	Brand	Lodging Rooms	STR Occ.	TBID Budget	DMO Budget	Total	Staff
1.	Gallatin / Visit Bozeman	\$1.08B	56,123	Rediscover Bozeman	7,203	71.4%	\$1.2M+	\$605K	\$1.8M	4 FT
2.	Flathead/Discover Kalispell	\$818M	28,450	Discover Kalispell	1,500	57.2%	605K	206K	\$811K	4 FT
3.	Yellowstone/Visit Billings	\$472M	119,960	Forge Your Own Path	4,500	68.8%	\$1.83M	\$492K	2.32M	6 FT
4.	Missoula/Destination Missoula	\$390M	76,955	There's This Place Where...	3,392	64.1%	\$1.4M	\$671K	\$2.1M	6 FT
5.	Cascade/Visit Great Falls	\$355M	60,382	Montana's Basecamp	2,375	61.2%	\$766K	\$213K	\$979K	3.5 FT
6.	Lewis & Clark/Visit Helena	\$304M	33,885	Experience Helena	1,961	61.3%	\$703K	\$183k	\$886K	3 FT

Observations:

- All of the top DMO names begin with "Visit" except Kalispell is "Discover"
- All of the DMO logos are typeface/font styles and only Butte has a western image/theme.
- Great Falls is the fifth in visitor spending in Montana.
- Visit Great Falls budget is ranked fourth.
- Visit Great Falls staff (three) is the smallest among the top five DMOs.

According to the [Montana Code Annotated \(7-12-1131\)](#), TBID funds can be used to "aid in tourism, promotion, and marketing within the district."





The consulting team reviewed the following reports, studies and documents as part of our destination review.

Economic Development Organizations

- Visit Great Falls Tourism Objectives, Tactics, Goals & Budget FY-23/24
- Great Falls BrandPrint Final Report, October 25, 2012, (North Star Destination Strategies)
- Central Montana 2023 Travel Planner. Central Montana Tourism.
- Central Montana Tourism Strategic Plan and Marketing Analysis, 2023
- Central Montana Situation Assessment Presentation, July 14, 2023 (Coraggio)
- Great Falls Area Chamber of Commerce, 2022 Great Falls Montana Community Guide.
- Great Falls Development Authority. Great Falls LIABILITY Magazine 2023.
- Great Falls Development Association Strategic Plan 2023-2025
- Great Falls Development Association SWOT Analysis Dec. 2021 (Barber Business Advisors)
- 2021 Great Falls Development Association Salient Points Report (Barber Business Advisors)

City/County/ State/Federal

- City of Great Falls Growth Policy Update 2013
- City of Great Falls Downtown Master Plan 2011
- Missouri River Urban Corridor Plan 2004
- 2020 Montana ExpoPark Improvement Study (CSL)
- Great Falls Medical District Final Master Plan, 2007
- Malmstrom AFB Joint Land Use Study, 2012
- Great Falls International Airport Flight Traffic Study
- University of Montana Institute for Tourism and Recreation Research Non-Resident Survey dashboard

Attractions/Amenities

- Explore Great Falls, Montana Museums, Great Falls Museums Consortium.
- Great Falls Parks & Recreation Master Plan 2016





The consulting team interviewed the following leaders both in-person and by teleconference during the research and discovery portion of the planning process. Additional interviews will take place during the plan-writing process after the November 8th planning workshop.

Executive Interviews

- Scott Arensmeyer, Springhill Suites
- Joe Briggs - Cascade County Commissioner
- Marshall Brunner - Holiday Inn
- Brett Doney - Great Falls Development Authority
- Greg Doyon - Great Falls City Manager
- Shane Etzwiler - Great Falls Chamber of Commerce
- Rebecca Engum – Visit Great Falls
- John Faulkner - Great Falls International Airport
- Tianna Ford - Enbar, Newberry, Voyagers
- Rae Grulkowski – Cascade County Commissioner
- Malissa Hollan - Best Western Plus Riverfront
- Mike Keller, Xanterra
- Mayor Bob Kelly – City of Great Falls
- Ron Korb - Townsquare Media and VGfMT Tourism Board
- James Larson - County Commissioner
- Andy Ney - Malmstrom Inn and Suites
- Kelly Pierce - Downtown Great Falls Association
- Scott Reasoner - Enbar, Newberry, Voyagers baseball club
- Brad Reynolds - Oakwells at Great Falls International Airport
- Jeff Schull – Days Inn, VGfMT Tourism Board
- Susan Shannon - Montana ExpoPark
- Brad Talcott - West Bank Landing
- Wayne Thares - VGfMT Tourism Board
- Sandra Thares - O’Haire Motor Inn, Sip ‘n Dip, VGfMT Tourism Board
- Thomas Trunkle - Ursuline Conference Centre and Museum
- Owen Grubenhoff - Great Falls Civic Center
- Kyleigh Heims - Great Falls Civic Center
- Jen Gray-O’Connor - Corragio Group
- Lorraine Roach - Hingston Roach Group





2022 DATA THE MONTANA TRAVEL INDUSTRY

12.5 MILLION VISITORS SPENT \$5.82 BILLION

WHEN ARE TRAVELERS COMING TO MONTANA?

Q1	Q2	Q3	Q4
13%	28%	43%	16%

4 OUT OF 5 NONRESIDENTS had visited Montana before

NONRESIDENT CONTRIBUTION

- 43,900 Jobs Supported**
- 1-IN-13 MONTANA WORKERS** is supported by out-of-state travel
- \$1.4B Employee Compensation (Direct)**
- \$5.2B Industry Output (Direct)**
- \$315M State & Local Taxes**

TOURISM REDUCES THE AVERAGE TAX BURDEN on every Montana household BY OVER \$721

Montana visitors spend an average of 5 NIGHTS & \$207/DAY

Lodging choices

Rented entire cabin/home	8%
Public campground	8%
Private campground	13%
Home/condo/cabin of friend/relative	20%
Hotel/motel	35%

Spending Categories

- Food & beverage: **\$1.5B**
- Transportation: **\$1.9B**
- Lodging: **\$1B**
- Shopping: **\$513M**
- Outfitter/Guide: **\$560M**

WHERE NONRESIDENTS ARE COMING FROM

WA	12%	OR	3%	CA	6%	AZ	2%	TX	4%	FL	2%
AR	5%	ND	7%	SD	2%	WY	6%	CO	4%	UT	4%
MT	10%	WY	6%	CO	4%	UT	4%	TX	4%	IL	2%
MI	2%	WI	2%	IN	5%	IA	2%	MO	2%	OH	2%

An estimated \$43 million gross lodging tax revenue (4%) went to the general fund in 2022

Source: MT Department of Commerce

2022 DATA THE MONTANA TRAVEL INDUSTRY

MONTANA'S OUTDOOR RECREATION ECONOMY

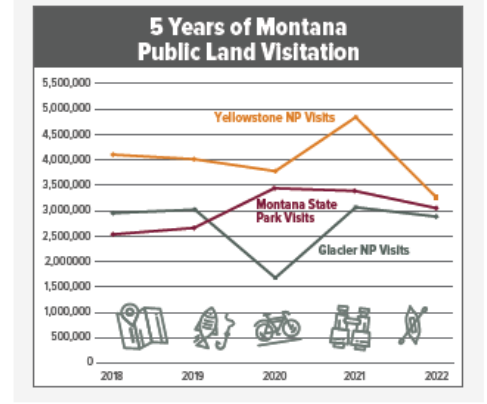
- GREW NEARLY 30%** from 2020-2021
- Accounted for **4.4% STATE GDP**

Source: US Bureau of Economic Analysis (BEA) 2021

LARGEST VALUE ADDED OUTDOOR RECREATION ACTIVITIES

- Boating/Fishing
- RVing
- Hunting/Shooting/Trapping

Source: US Bureau of Economic Analysis (BEA) 2021



74% of residents who camped in Montana did so on public lands

In 2022, ITRR surveyed 7,496 nonresidents and 11,537 residents which produces on-going quarterly economic, travel and recreation analysis for the state of Montana.

97% of travelers report Montana met or exceeded expectations

..... their reasons

- Beauty of State
- Friendliness of Residents
- Abundance of Wildlife

89% of nonresidents plan to return in the next 2 years

TOP MONTANA SITES VISITED BY NONRESIDENTS

- Glacier National Park **31%**
- Yellowstone National Park **23%**
- Montana State Parks **9%**
- Hot springs **6%**
- Ghost towns **5%**

TOP NONRESIDENT ACTIVITIES

- 42% Day Hiking
- 29% Wildlife Watching
- 26% Nature Photography
- 47% Scenic Driving
- 26% Car/RV Camping

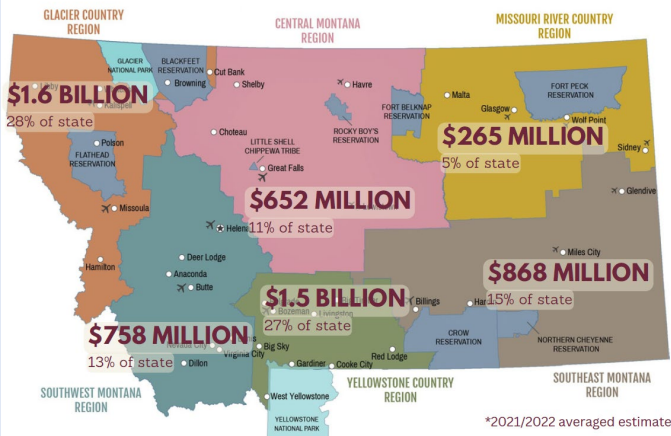


Destination Exploration & Analysis – Tourism Economic Impact

Cascade County Summary:

- Central Montana generates 11% of statewide visitor spending. Over half of that is generated in Cascade County (6% of state).
- Cascade County visitor spending (\$355M) ranks fifth among 56 counties in Montana.
- Tourism in Cascade County:
 - 3,080 jobs
 - \$80.09M Annual Payroll
 - \$3.25M State & Local Taxes

\$5.68 billion* in Montana



Source:

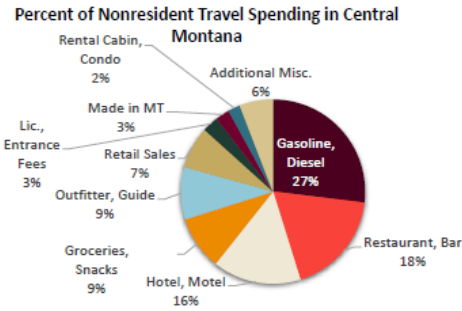


2022 Central Montana Region Tourism Economic Impact



2022 Nonresident Traveler Expenditures & Economic Contribution in Central Montana Travel Region

Gasoline, Diesel	\$175,779,000
Restaurant, Bar	\$119,068,000
Hotel, Motel	\$101,077,000
Groceries, Snacks	\$61,561,000
Outfitter, Guide	\$59,823,000
Retail Sales	\$48,197,000
Lic., Entrance Fees	\$18,553,000
Made in MT	\$16,178,000
Rental Cabin, Condo	\$13,871,000
Auto Rental	\$13,698,000
Misc. Services	\$8,878,000
Campgrnd, RV Park	\$7,202,000
Gambling	\$4,189,000
Vehicle Repairs	\$3,333,000
Farmers Mkt	\$746,000
Transp. Fares	\$240,000
TOTAL	\$652,393,000



2022 Contribution of Nonresident Traveler Expenditures in Central Montana Travel Region

- 2022 estimates of spending in Central Montana by nonresident visitors to the state totaled over \$652 million.
- This \$652 million in local spending directly supports \$583.4 million of economic activity in the region, and supports an additional \$318.6 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$902 million.

	Direct	Indirect	Induced	Combined
Industry Output	\$583,387,000	\$183,493,000	\$135,120,000	\$902,000,000
Employment (# of jobs)	5,689	970	883	7,543
Employee Compensation	\$140,405,000	\$40,203,000	\$36,457,000	\$217,065,000
Proprietor Income	\$16,013,000	\$8,105,000	\$5,104,000	\$29,222,000
Other Property Type Income	\$54,132,000	\$22,667,000	\$26,890,000	\$103,689,000
State & Local Taxes ^A	\$21,678,000	\$27,876,000	\$13,754,000	\$63,308,000

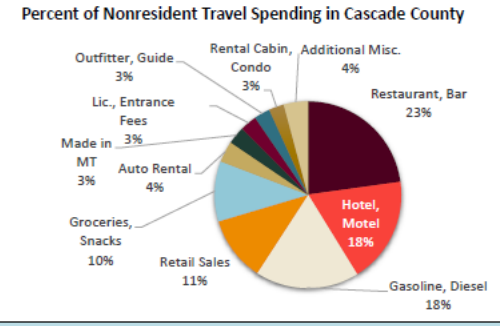
Direct impacts result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations. **Industry Output** is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends. ^AData is collected at the state level. In 2022, several categories had insufficient sample size for regional breakout. ⁰Expenditure category totals may not add to overall total due to rounding. ^A Comparison to previous years is not advised.

2022 Cascade County Tourism Economic Impact



2022 Nonresident Traveler Expenditures & Economic Contribution in Cascade County

Restaurant, Bar	\$81,074,000
Hotel, Motel	\$65,385,000
Gasoline, Diesel	\$63,831,000
Retail Sales	\$39,954,000
Groceries, Snacks	\$36,954,000
Auto Rental	\$12,996,000
Made in MT	\$10,867,000
Lic., Entrance Fees	\$10,390,000
Outfitter, Guide	\$9,775,000
Rental Cabin, Condo	\$9,330,000
Misc. Services	\$5,302,000
Campgrnd, RV Park	\$4,114,000
Vehicle Repairs	\$2,932,000
Gambling	\$1,982,000
Farmers Mkt	\$290,000
Transp. Fares	\$240,000
TOTAL	\$355,417,000



2022 Contribution of Nonresident Traveler Expenditures in Cascade County

- 2022 estimates of spending in Cascade County by nonresident visitors to the state totaled over \$355 million.
- This \$355 million in local spending directly supports \$284 million of economic activity in the region, and supports an additional \$181 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$465 million.

	Direct	Indirect	Induced	Combined
Industry Output	\$284,439,000	\$94,038,000	\$86,794,000	\$465,271,000
Employment (# of jobs)	3,080	562	570	4,213
Employee Compensation	\$80,092,000	\$25,156,000	\$25,154,000	\$130,402,000
Proprietor Income	\$9,929,000	\$3,432,000	\$2,669,000	\$16,030,000
Other Property Type Income	\$36,781,000	\$12,608,000	\$17,056,000	\$66,445,000
State & Local Taxes ^A	\$3,245,000	\$2,598,000	\$3,058,000	\$8,901,000

Direct impacts result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations. **Industry Output** is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends. ^AData is collected at the state level. The two-year average of expenditures (2022 \$) was used to help account for small and varying sample sizes at the county level. ⁰Expenditure category totals may not add to overall total due to rounding. ^A Comparison to previous years is not advised.



VISIT
Great Falls
MONTANA

Geolocation Visitor Profile Data



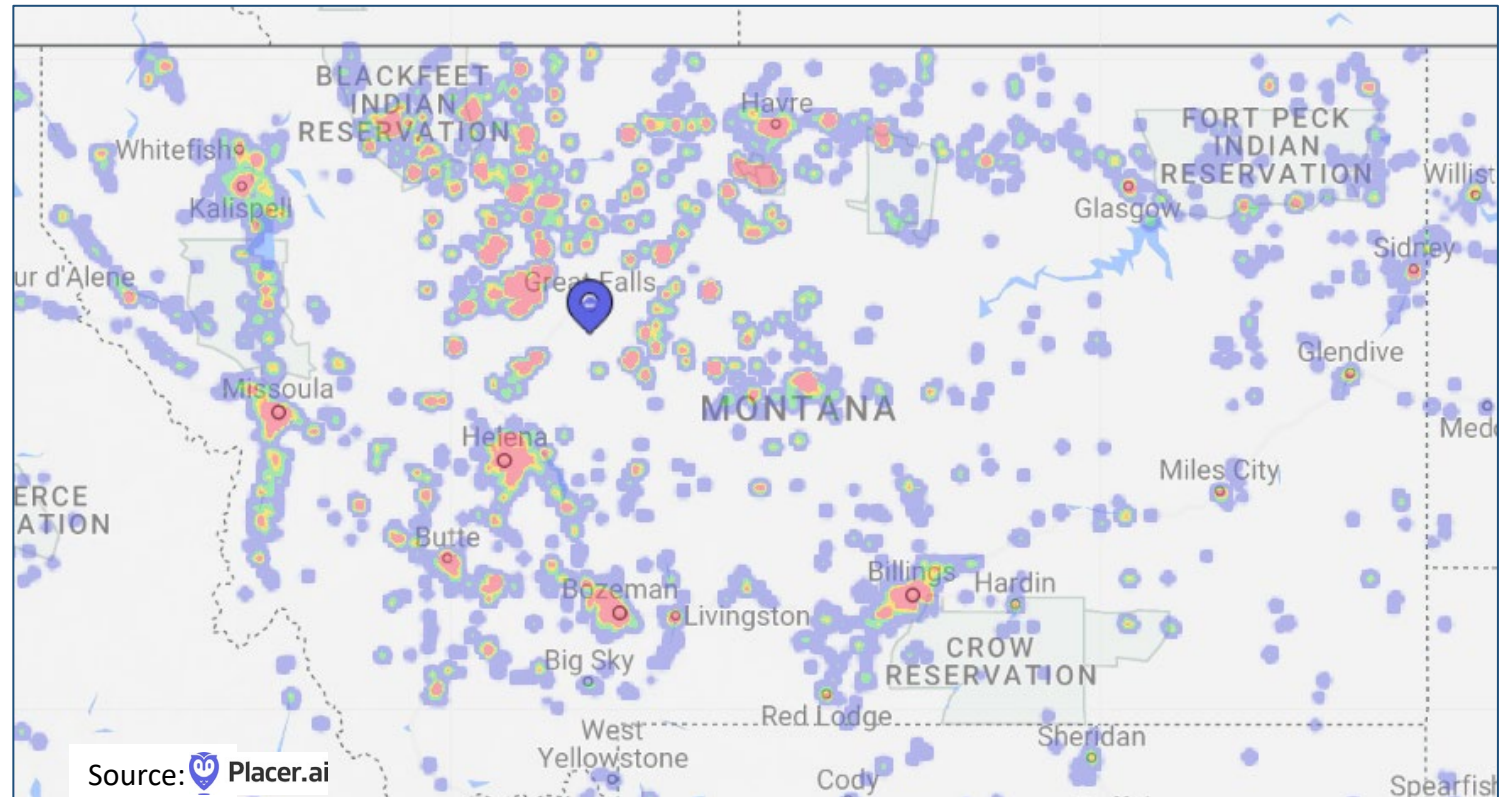
Geolocation Data Methodology:

- The YSI/RSI consulting team procured data from two geolocation sources to provide visitor profile and behavior analysis for Great Falls: Placer.ai & Zartico. Geolocation data uses the IP address of electronic devices to determine their location and movement. The data reveals the points of origin of the devices and the places they visited in Great Falls, the duration of the visit and the sequence of the places visited.
- **Placer.ai** provides machine learning-powered human mobility insights in an interactive dashboard. Gathering data from a panel of mobile devices nationwide, Placer.ai’s Foot Traffic Dataset helps clients understand the visitation at a specific site or area – how many people visit, types of visitors, and traits of the visit (when they visit, how long they stay, and how often they return).
- **Zartico** solely focuses on travel destination analytics and advanced data insights that allow destinations to understand the “why” and prepare for “what’s next.” Zartico’s platform ingests the world’s largest commercially available stream of geolocation data layers it with credit card spending data and event data to paint a complete picture of your destination.
- Geolocation data is used by all type of retail and service businesses around the world. These data sets are not unique to the travel industry nor to Great Falls Tourism. Identifying information is stripped from the data so privacy concerns are alleviated.

Observations:

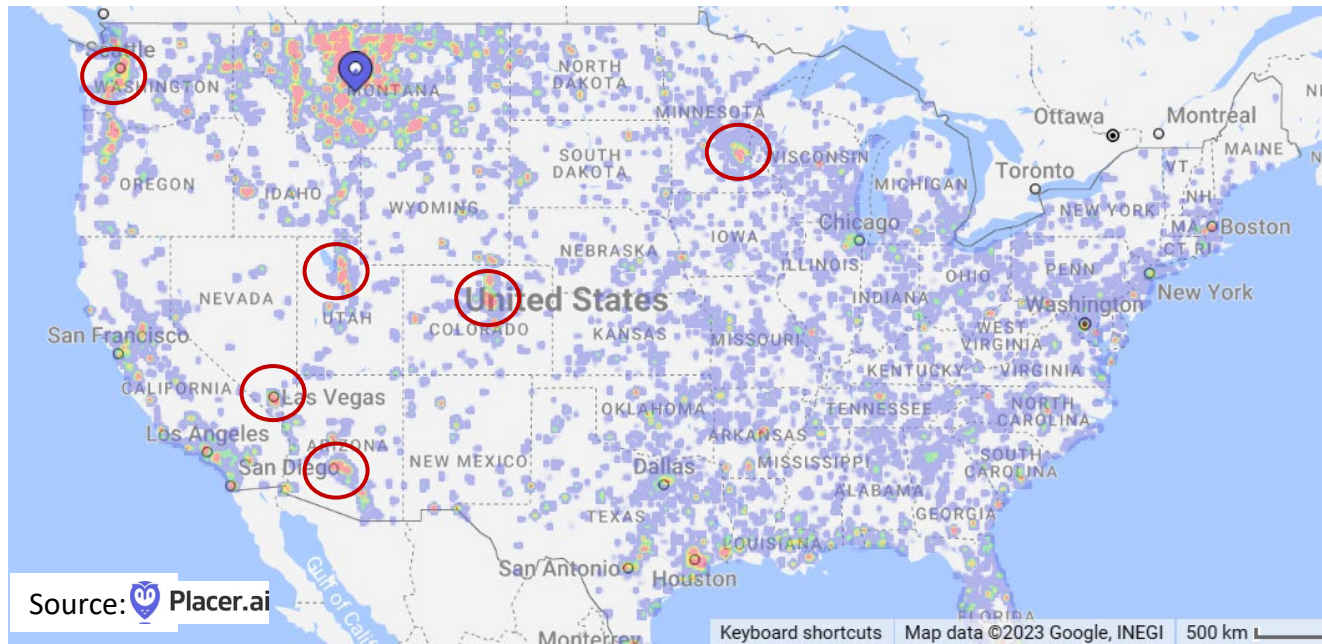
- Geolocation data for Great Falls in 2022 reveals the diversity of visitor types to Great Falls.
- The data reveals that residents in nearby Montana markets are frequent repeat visitors to Great Falls as the city is their business, agricultural, retail, dining and healthcare hub.
- Visitors from within 250 miles account for about 58% of total visits to Great Falls tracked in 2022.
- Top MT source zip codes for *visits*: Havre (3.7%); Browning (2.8%); Concord (2.2%); Helena (2.2%); Missoula (2.1%); Helena (2.0%); Lewistown (1.9%); Box Elder (1.8%). Source: Placer.ai

Map of 2022 Visitors to Great Falls From Montana





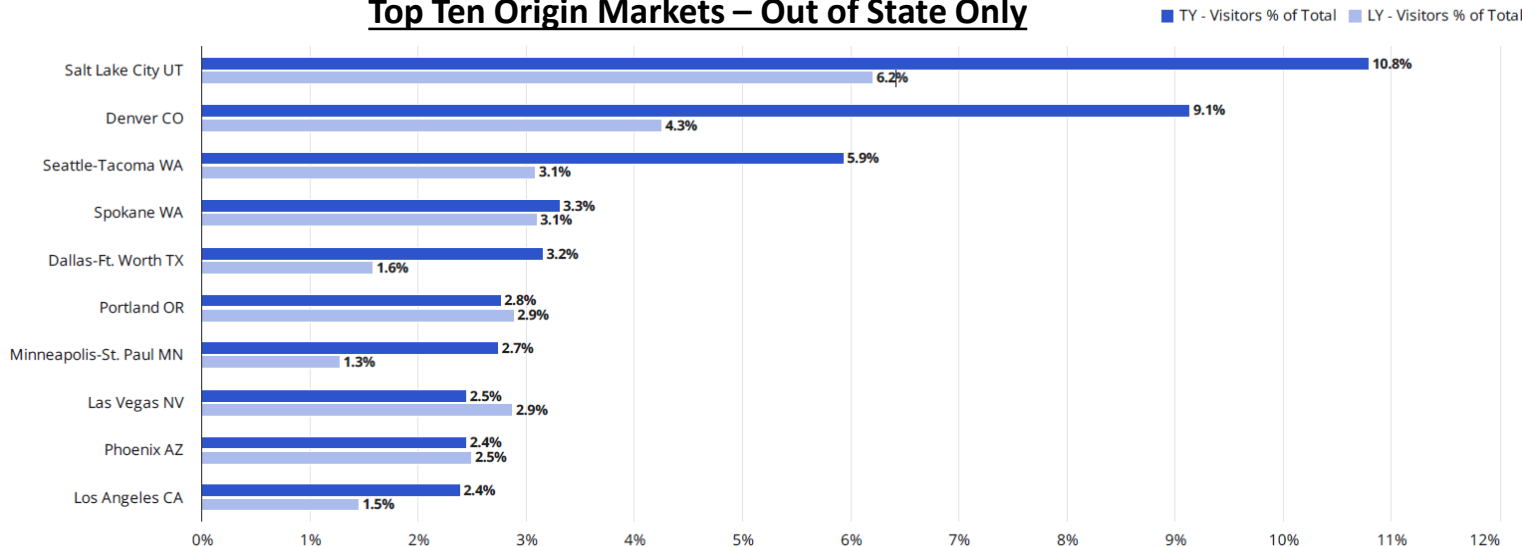
Map of 2022 Visitors to Great Falls From USA Lower 48 States



Observations:

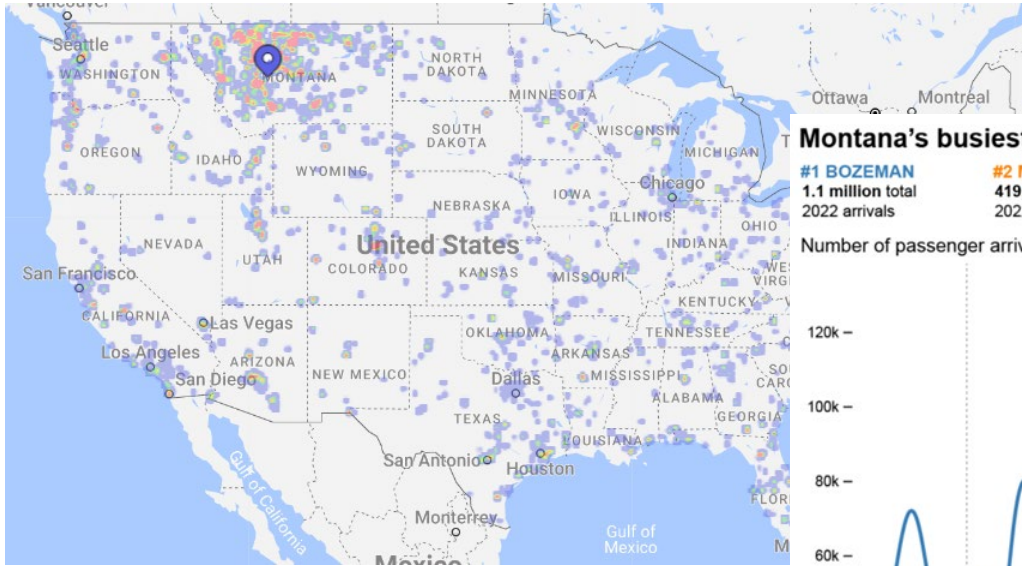
- Great Falls is a destination appealing to travelers from all 48 states that serves as a basecamp for MT activities and as a gateway to Glacier National and Yellowstone National Parks. Malmstrom Air Force Base and business/agriculture travelers come from all parts of the United States.
- Major markets like Seattle, Portland, Denver, Colorado Springs, Salt Lake City, Phoenix, Minneapolis, Dallas, and Houston appear with sizeable visitation to Great Falls.
- Direct air service to Great Falls International Airport from Seattle (Alaska Airlines), Denver & Las Vegas (United), Phoenix (Allegiant) Salt Lake City & Minneapolis (Delta) brings travelers who connect through major hub airports.

Top Ten Origin Markets – Out of State Only





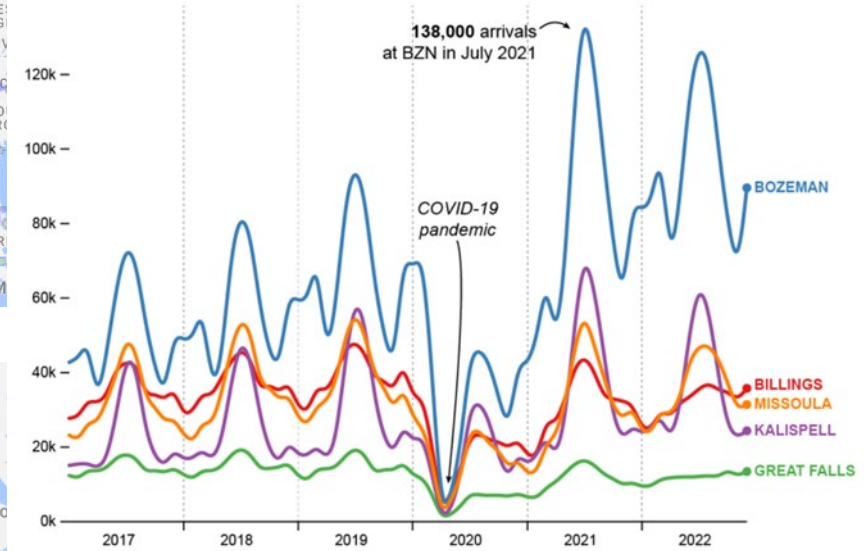
Winter 2021/ 2022 (December – February)



Montana's busiest airports

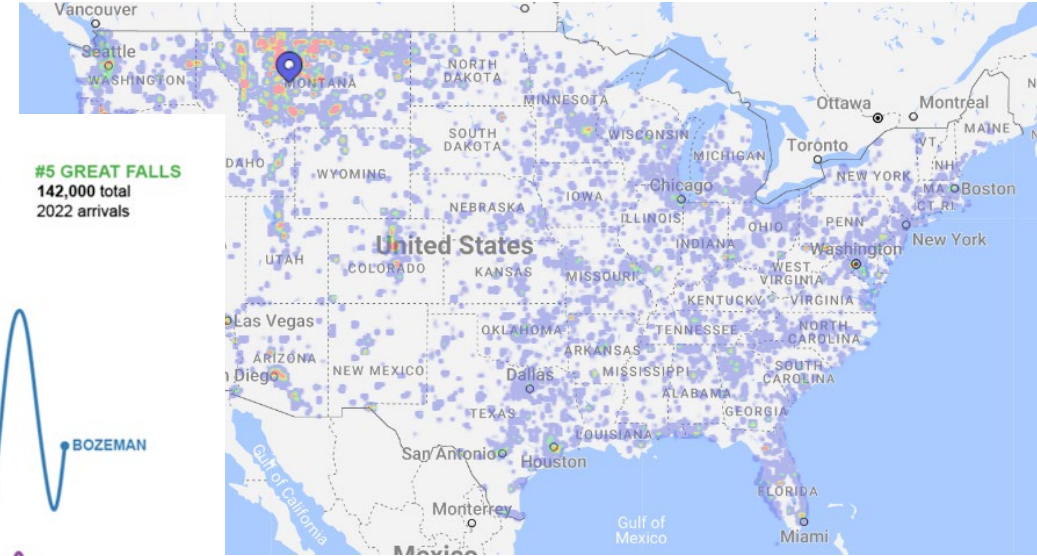
#1 BOZEMAN 1.1 million total 2022 arrivals	#2 MISSOULA 419,000 total 2022 arrivals	#3 KALISPELL 413,000 total 2022 arrivals	#4 BILLINGS 384,000 total 2022 arrivals	#5 GREAT FALLS 142,000 total 2022 arrivals
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Number of passenger arrivals recorded by month

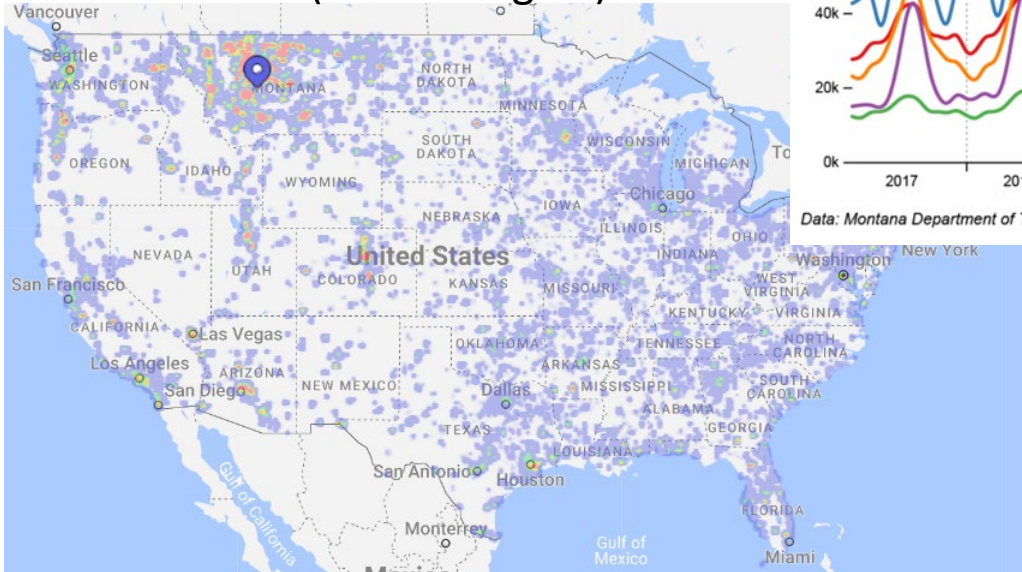


Data: Montana Department of Transportation Aeronautics Division. Chart: Eric Dietrich / MTFP.

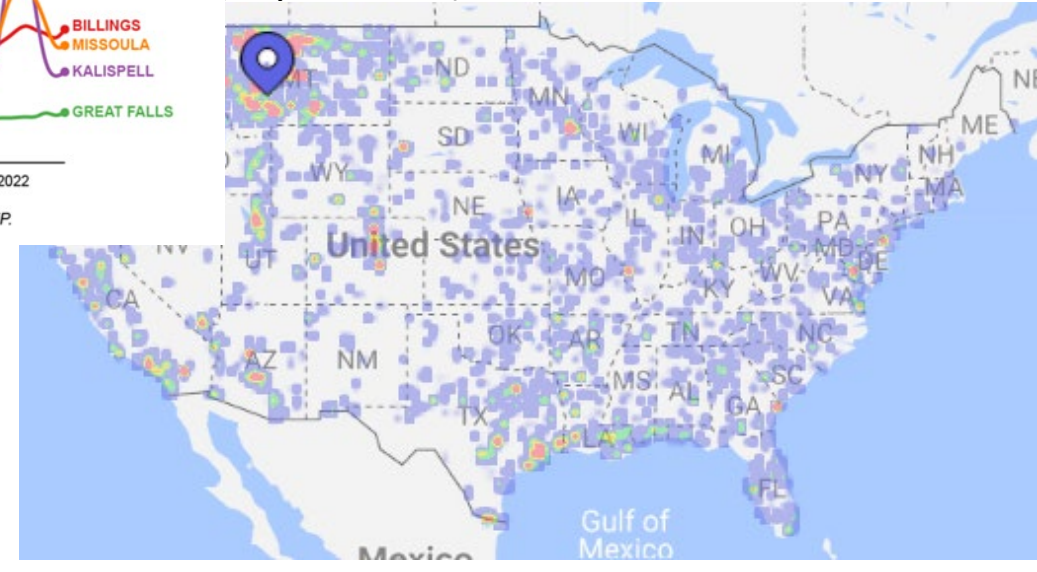
Spring 2022 (March – May)



Summer 2022 (June – August)



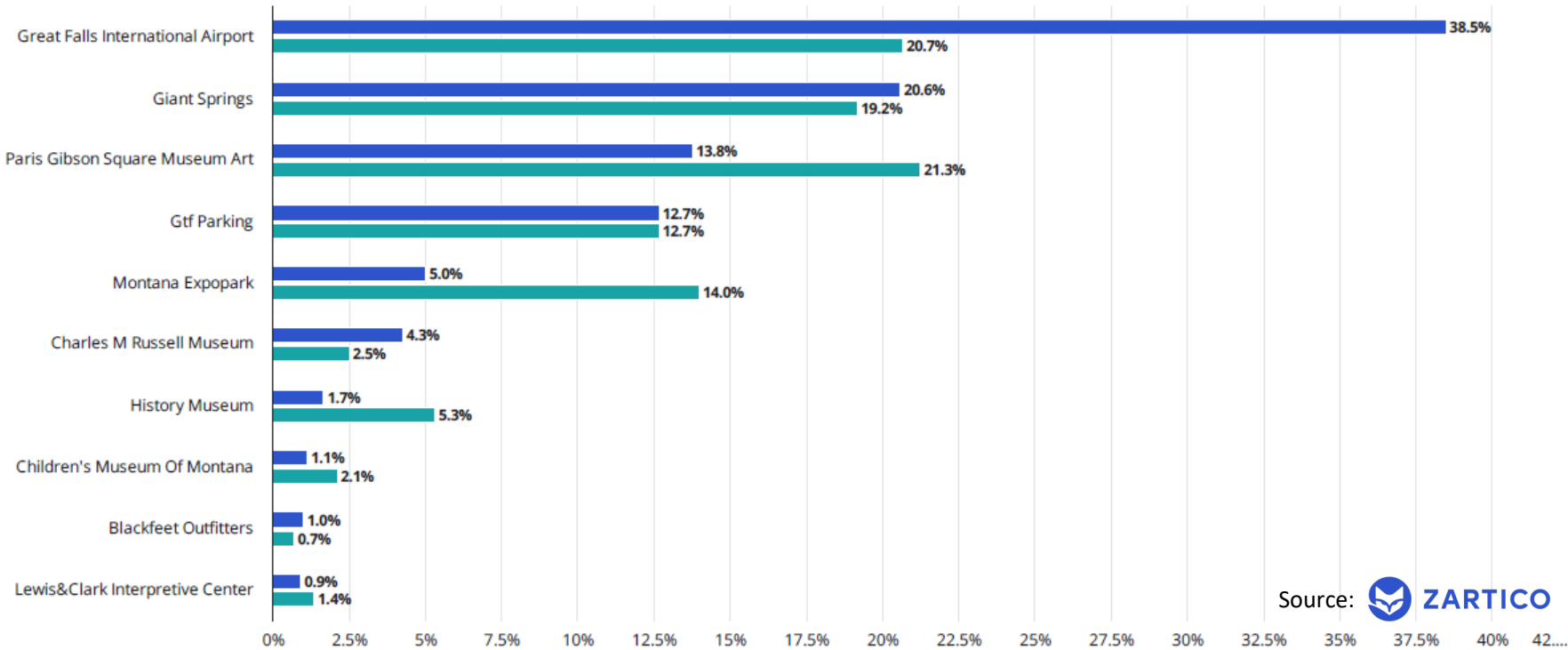
Sept – Nov





Top 10 Places Visited in Great Falls: Out-Of-State vs In-State Visitation Trends

■ % Out-of-State Visitors ■ % In-State Visitors



Source: ZARTICO

Observations:

- The table above identifies the top ten Great Falls locations where visitors from out-of-state and in-state frequented in 2022.
- Top locations frequented by out-of-state visitors were (in rank order): Great Falls Airport (1st, Parking 4th), Giant Springs (2nd), Paris Gibson Square Museum of Art (3rd), Montana ExpoPark (5th), Charles M Russell Museum (6th), History Museum (7th), Children’s Museum of Montana (8th), Blackfeet Outfitters (9th), Lewis & Clark Interpretive Center (10th).
- Top locations frequented by out-of-state visitors were (in rank order): Paris Gibson Square Museum of Art (1st), Great Falls Airport (2nd, Parking 5th), Giant Springs (3rd), Montana ExpoPark (4th), History Museum (6th), Charles M Russell Museum (7th), Children’s Museum of Montana (8th), Lewis & Clark Interpretive Center (9th), , Blackfeet Outfitters (10th),





Montana State Fair Estimated Visitation – Placer.ai Geolocation Data

- According to mobile geolocation data the Montana State Fair enjoyed about 194,100 visits from 112,400 unique attendees in 2023. Each attendee visited the Fair an average of 1.7 times.
- Visitation in 2023 was up 21% from 2022 and up 30% from 2021.
- Two-thirds (65%) of visits to the Fair came from the following Great Falls and Black Eagle Postal Zip Codes: 59404, 59405, 59401, 59414.
- The top 38 zip codes providing visitors were all from MT. #39 was Round Rock, TX.
- The vast majority of visitors to the State Fair came from residents in the Central Montana region and Alberta.
 - Over two-thirds (71%) of attendees came from within 30 miles
 - Four-out-of-five attendees (83%) came from within 100 miles
 - Over 9/10 (93%) came from within 250 miles

Montana ExpoPark reports almost \$2 million in revenue from the 2023 Montana State Fair

GREAT FALLS, Mont. - The Montana ExpoPark reported almost \$2 million in revenue from the 2023 Montana State Fair.

More than \$1,942,000 in revenue was reported from the event. Food Concessionaires grossed \$976,609, feeding hungry patrons. Over the nine days the fair was open, the Mighty Thomas Carnival grossed \$809,982.

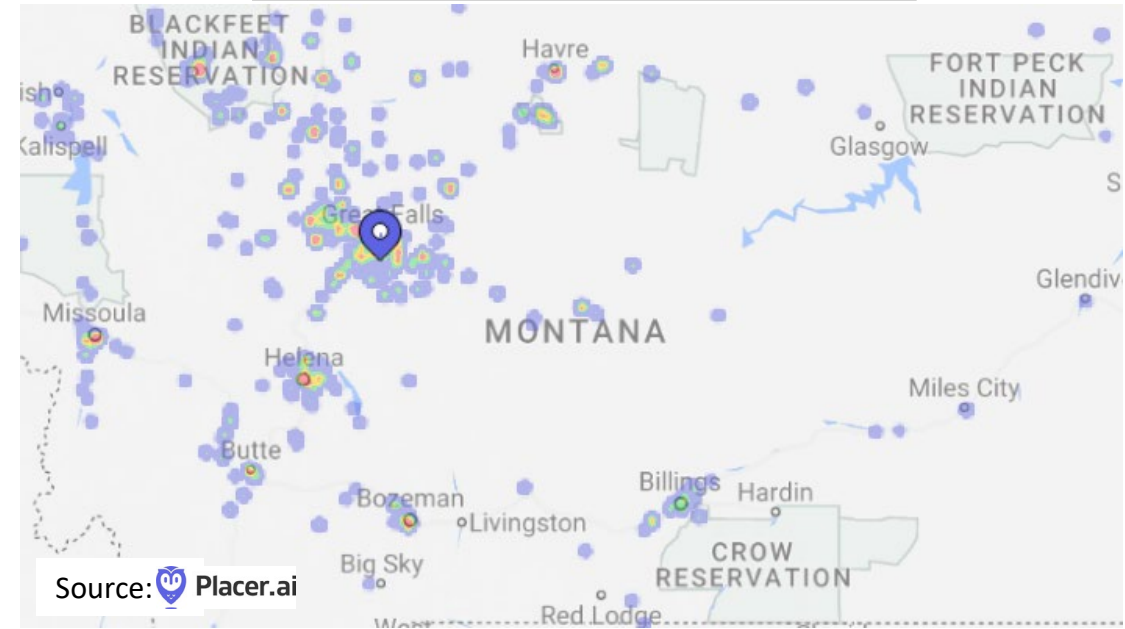
According to the ExpoPark, Wednesday, Aug. 2 was the most visited day of the fair, with 11,375 fairgoers enjoying a day at The Mighty Thomas Carnival, PRCA Big Sky Pro Rodeo, and the Gabriel "Fluffy" Iglesias show.

Total paid guests at the 2023 Montana State Fair were 76,055.

The total fair gate admission revenue was \$424,928.

SOURCE: https://www.montanarightnow.com/great-falls/montana-expopark-reports-almost-2-million-in-revenue-from-the-2023-montana-state-fair/article_59be5068-4757-11ee-8a8f-7ba51e3eac9f.html#:~:text=Total%20paid%20guests%20at%20the,of%20the%20action%2Dpacked%20rodeo.

Map of 2023 Visitors to Montana State Fair



Observations:

- The Montana State Fair takes place every summer at the Montana ExpoPark.
- Management at the ExpoPark released revenue and attendance statistics (see news article on the left) in the weeks following the State Fair. The statistics released by the park management were based on ticket sales and gate attendance. The management team estimated 76,055 paid attendees.
- Geolocation data is provided in the table-top left and mapped top right. The data shows the vast majority of state fair attendees come from within the State of Montana (as would be expected).
- The geolocation data estimated 112,400 unique visitors to the fair grounds which includes non-ticket purchasers including comped attendees, staff, volunteers, exhibitors, performers, vendors, maintenance, custodial, etc.

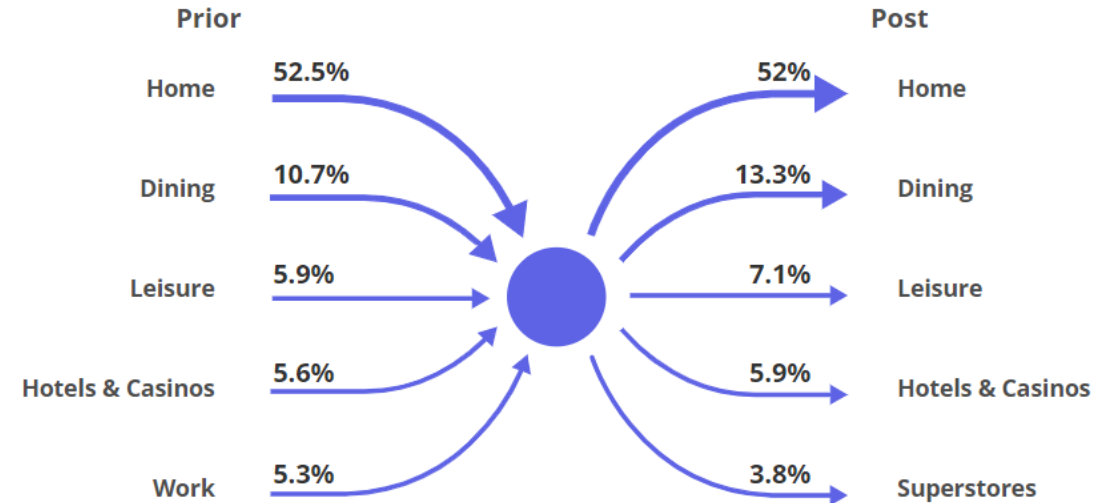


What do Attendees do before and after the Fair?

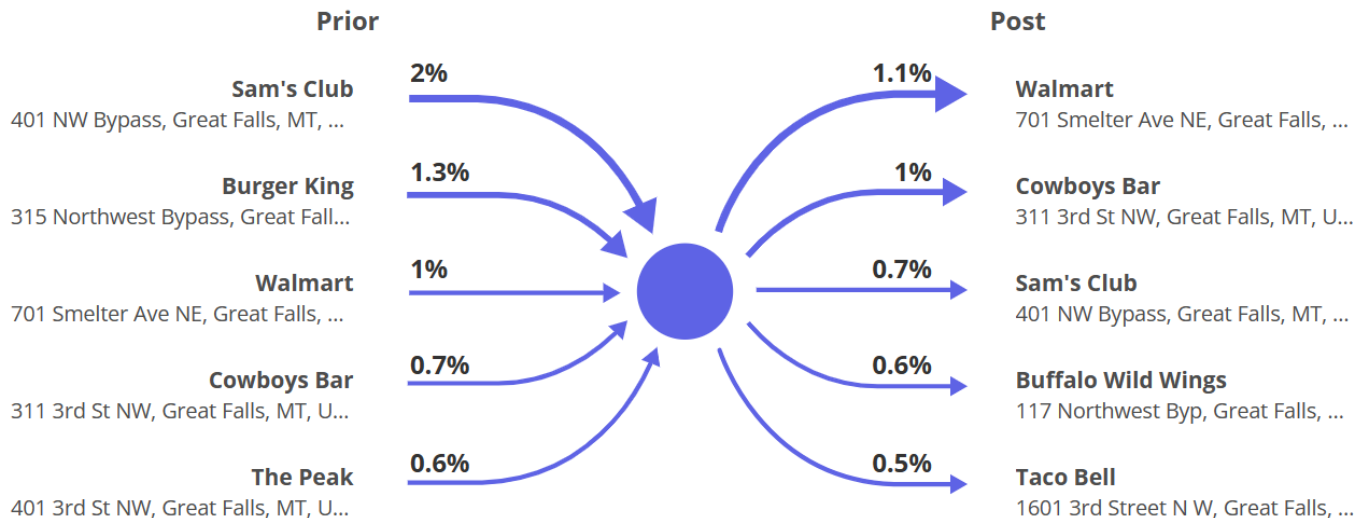
Placer.ai data reveals the activities of those who went to the fair both before they arrived at the Fair and after they left.

- The data shows many *residents* go directly to and from the fair from their homes or work (see table to the right).
- *Non-residents* are more likely to go to superstores, bars, restaurants, and their hotels.

Top Pre & Post Categories



Top Pre & Post Venues (without work / home)





Lodging Market Study

Methodology

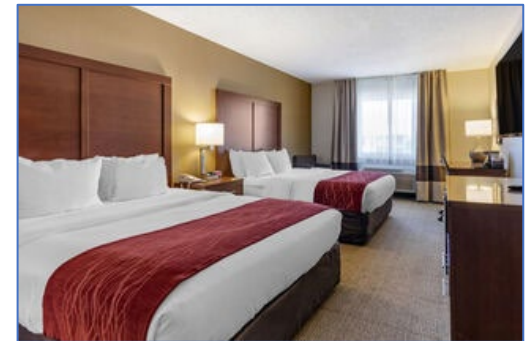
- **STR Data for Great Falls** - Young Strategies/Rudloff Solutions purchased lodging data from STR for the hotel/motel properties located in Great Falls, MT in the form of an 8-year trend report, including 365-daily data, for all STR-participating hotel/motel properties. **STR receives data from 21 hotels in Great Falls representing 85% of the rooms in the market.**
- **Survey of Lodging Managers** - Young Strategies, Inc. (YSI) and Rudloff Solutions (RS) conducted a survey of the hotel/motel properties located in Great Falls, MT. The online questionnaire was sent to the database of hotel/motel lodging managers in Great Falls who were asked to estimate the following key metrics for the full calendar year 2023 (projected): percentage of occupancy driven by 8 market segments and annual occupancy. Lodging surveys were collected in October 2023.



Great Falls Lodging Market Analysis

Summary of Findings

- Great Falls hotel/motel lodging supply (32 hotels, 2,375 rooms) has increased 14.5% in the past 8 years, while demand has outpaced supply slightly faster (16.3%).
- 2022 Great Falls occupancy rate was 61.2% compared to national 62.7%.
- Great Falls occupancy rate trailed the national occupancy rate by 3-7% 2015-2019.
- Great Falls lodging pandemic recovery was faster-paced than the national average and now trails the national average by only 1.5%.
- Highest monthly occupancy usually occurs in June - September. November-December have the lowest occupancies, along with January, February, and April. The Western Art Week provides a nice boost to March showing the power of events during slow periods.
- Sunday nights typically run the lowest occupancy (43%) while Fridays are highest (62%).
- Both mid-week and weekend period show solid occupancies of over 60%.
- The potential for significant growth with groups can only happen in the winter months, as the market lacks capacity from May to October.
- Great Falls is currently a transient lodging market, far-more-so than a group market.
- The segmentation survey data herein reveals the majority of rooms (71.7%) are driven by transient demand with downtown hotels garnering more transient business than the airport corridor.
- Business transient is the largest single segment overall and in the two geographic subsets.
- The lodging data reported herein confirm that demand is present in the market to necessitate the development of new lodging that is underway at the end of 2023.

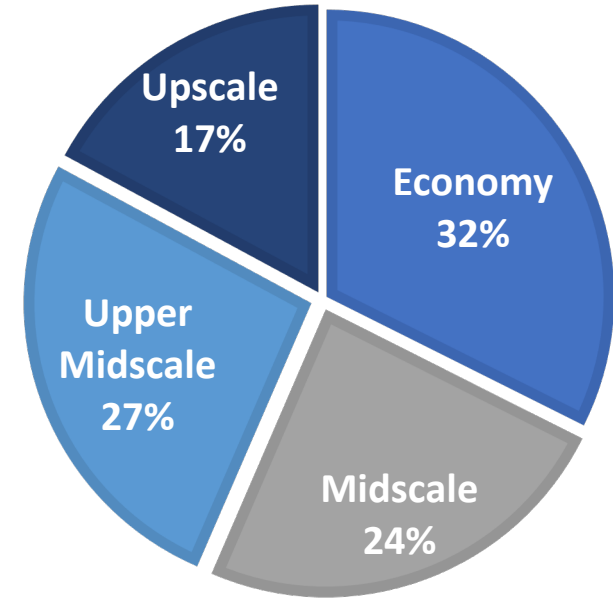




Great Falls Montana Hotel/Motel Lodging Classification

STR classification for the 32 Great Falls hotel/motel properties is shown in the table below.

STR Classification Great Falls Properties	32 Properties	2,375 Rooms	% of Market
Luxury	0	0	0.0%
Upper Upscale	0	0	0.0%
Upscale	4	407	17.1%
Upper Midscale	7	627	26.4%
Midscale	6	572	24.1%
Economy	15	769	32.4%



Observations:

- Hotels in Great Falls are classified by STR in nearly equal proportions among the four mid-lower end of the scale.
- No hotels are classified as luxury or upper-upscale.

The charts and tables on the following pages outline the overall findings from the lodging properties that responded to the YSI survey as well as the STR trend and daily data. YSI estimates a margin of error (+/- 3-5%).



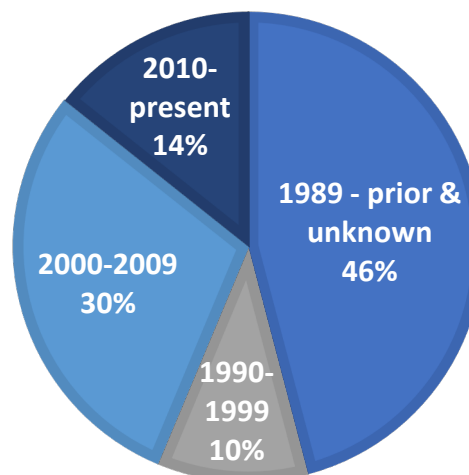


Great Falls STR Hotel/Motel Lodging Inventory

The 32 hotel/motel properties located in Great Falls are listed in chronological order by open date (STR data) in the table below.

2023 Great Falls Inventory	STR Classification	Open Date	Rooms
1989 – Prior = 16 Properties		45.9%	1,091
Malmstrom Inn & Suites	Economy	N/A	83
Royal Motel	Economy	Jun-52	22
Starlit Motel	Economy	Jun-52	20
Ski’s Western Motel	Economy	Mar-57	25
Mid Town Motel	Economy	Apr-58	39
O’Haire Motor Inn	Economy	Jun-62	67
Travelodge Great Falls	Economy	Mar-66	104
Crestview Inn	Economy	Jun-72	35
Heritage Inn	Midscale	Jun-72	230
Plaza Inn	Economy	Aug-72	26
Central Motel	Economy	Jun-76	28
Holiday Inn Great Falls	Upper Midscale	Jun-78	168
The Gibson	Upscale	Jun-78	44
Grizzly Inn	Economy	Aug-78	110
Motel 6	Economy	Dec-83	59
Imperial Inn	Economy	Dec-88	31
1990 - 1999 = 4 Properties		10.4%	246
Comfort Inn Great Falls	Upper Midscale	Sep-92	64
Days Inn Great Falls	Economy	Nov-92	60
Wingate by Wyndham	Midscale	Nov-92	62
The Great Falls Inn	Economy	Feb-94	60

2023 Great Falls Inventory	STR Classification	Open Date	Rooms
2000 – 2010 = 7 Properties		29.4%	698
Best Western Plus Riverfront	Upper Midscale	Jun-00	92
Comfort Inn & Suites	Upper Midscale	Jun-00	88
Crystal Inn Hotel & Suites	Midscale	Jun-01	86
Extended Stay America	Midscale	Mar-02	104
Hampton Inn	Upper Midscale	May-03	97
Hilton Garden Inn	Upscale	Aug-08	118
Staybridge Suites	Upscale	Jul-09	113
2011 – present = 5 Properties		14.3%	340
Holiday Inn Express & Suites	Upper Midscale	Jan-11	85
Hotel Arvon	Upper Midscale	Sep-15	33
Springhill Suites	Upscale	Apr-18	132
Mainstay Suites	Midscale	Aug-20	42
Sleep Inn & Suites	Midscale	Aug-20	48



Observations:

- Nearly half (44%) of the Great Falls hotel room inventory (12 hotels) was built since 2000.
- The greatest portion of room inventory (46%) in Great Falls was built prior to 1990 and represents primarily economy or midscale hotels.



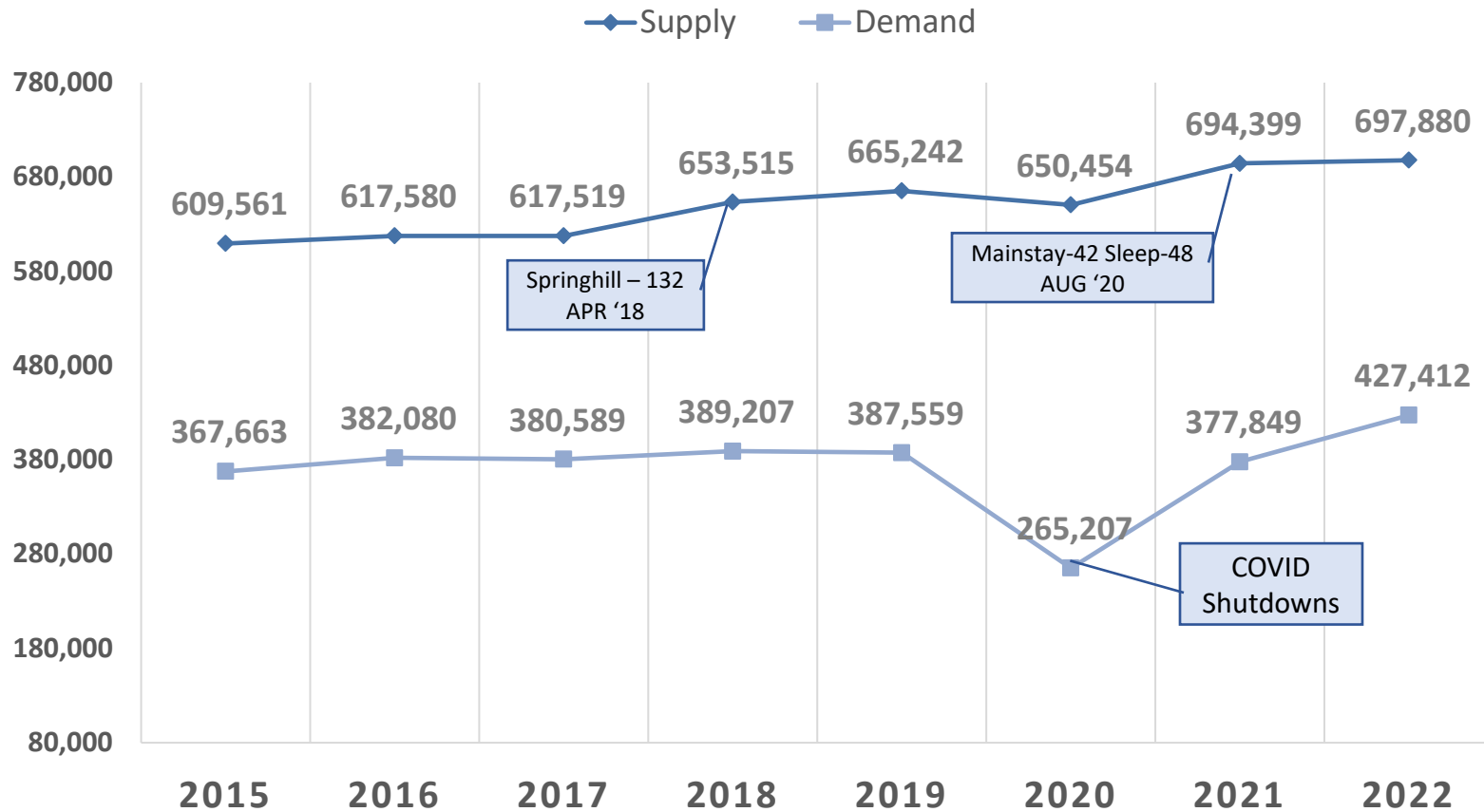
Great Falls STR Data Analysis

Young Strategies / Rudloff Solutions purchased lodging data from STR (STR is a global accommodations analytics firm) for the hotel/motel properties located in Great Falls. The STR reports included an 8-year trend report, including 365-daily data, for all STR-participating hotel/motel properties in Great Falls.

All tables and charts following reflect the STR data provided in these reports.

Annual lodging supply is calculated as a sum of the daily room inventory for all 365 nights in the year. Demand is the total number of room nights sold in the market. Divide demand into supply to determine the occupancy percent.

8-YR SUPPLY VS DEMAND TREND



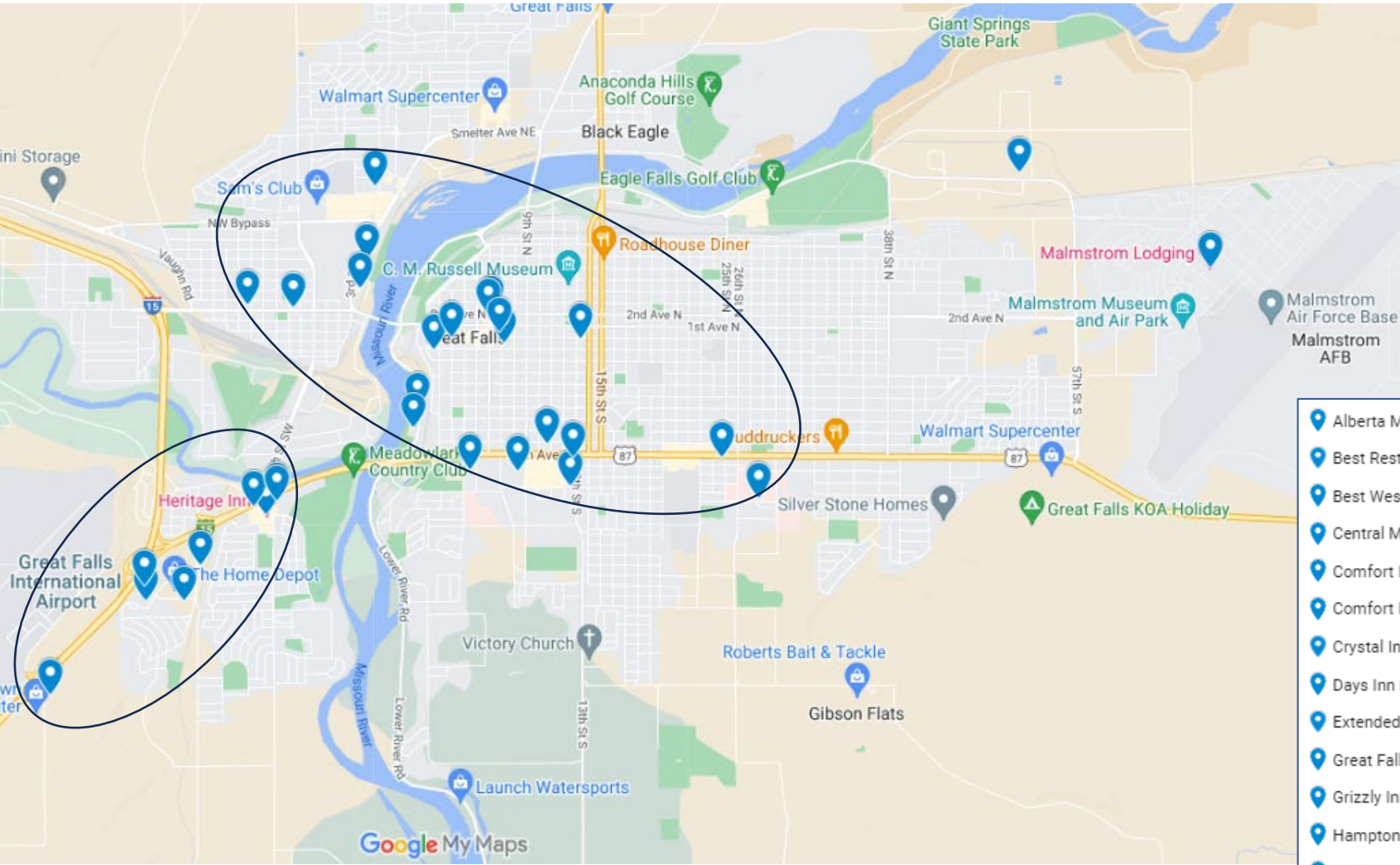
Supply vs. Demand 2015 - 2022				
	Supply	% Chg	Demand	% Chg
2015	609,561	~	367,663	~
2016	617,580	1.3%	382,080	3.9%
2017	617,519	0.0%	380,589	-0.4%
2018	653,515	5.8%	389,207	2.3%
2019	665,242	1.8%	387,559	-0.4%
2020	650,454	-2.2%	265,207	-31.6%
2021	694,399	6.8%	377,849	42.5%
2022	697,880	0.5%	427,412	13.1%

Observations:

- Lodging room supply has grown 14% since 2015 with the addition of Springhill Suites (132 rooms) in April 2018 and Mainstay Suites (42 rooms) and Sleep Inn (48 rooms) in August 2020. The addition of these rooms in August was not enough to offset the number of rooms taken out of inventory during the first year of COVID-19.
- Demand for rooms has been growing steadily with a typical crash in 2020 due to COVID-19. The recovery in 2021 was more rapid than most similar destinations experienced.



Map of Great Falls Lodging properties



Observations:

- A majority of Great Falls lodging rooms (60%) are clustered in proximity to the downtown on both sides of the Missouri River between Interstate Highway 15 and 15th Street.
- The airport cluster of lodging has 40% of the rooms.
- The lack of lodging development in the eastern portion of the city in close proximity to Malmstrom AFB indicates that the base is not a significant driver of hotel room nights. Malmstrom Inn & Suites serves the military exclusively.

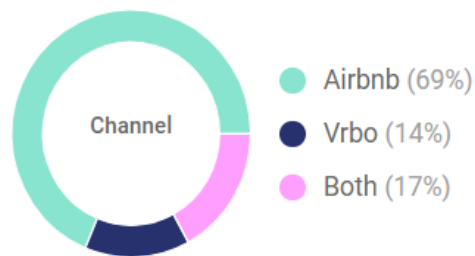
- | | |
|---|---|
| <ul style="list-style-type: none"> • Alberta Motel • Best Resting Motel • Best Western Plus Riverfront Hotel And Suites • Central Motel • Comfort Inn • Comfort Inn & Suites Market - Airport • Crystal Inn Hotel & Suites Great Falls • Days Inn by Wyndham Great Falls • Extended Stay America - Great Falls - Misso... • Great Falls Inn by Riversage • Grizzly Inn • Hampton Inn Great Falls • Heritage Inn • Hilton Garden Inn Great Falls • Holiday Inn Express & Suites Great Falls, an I... • Holiday Inn Great Falls-Convention Center, a... | <ul style="list-style-type: none"> • Hotel Arvon • Imperial Inn • Midtown Motel • Motel 6 Great Falls, MT • O'Haire Inn • Plaza Inn • Royal Motel • Western Motel • Sleep Inn & Suites Great Falls Airport • MainStay Suites Great Falls Airport • SpringHill Suites by Marriott Great Falls • Staybridge Suites Great Falls, an IHG Hotel • The Gibson Hotel Great Falls, Ascend Hotel ... • Travelodge by Wyndham Great Falls • Wingate by Wyndham Great Falls • Malmstrom Inn & Suites |
|---|---|



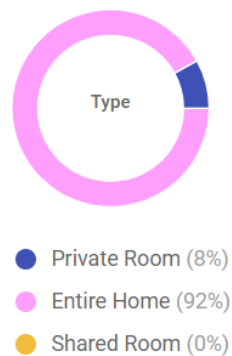
Great Falls: Short-term Rentals

AirDNA is a platform that scrapes data from the AirBnB and VRBO websites to provide market analysis for the short-term rentals in any given market. AirDNA shows 264 active rental properties in Great Falls (as of November 2023) with a variety of price ranges.

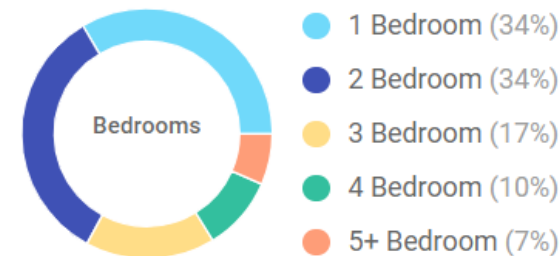
Listings by rental channel



Listings by rental type

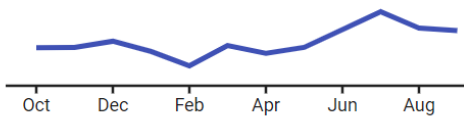


Listings by rental size



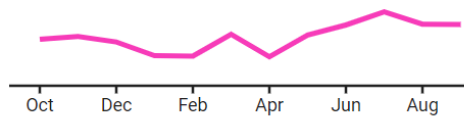
Annual Revenue

\$33.2K -5% past year



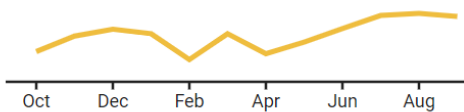
Occupancy Rate

57% +14% past year



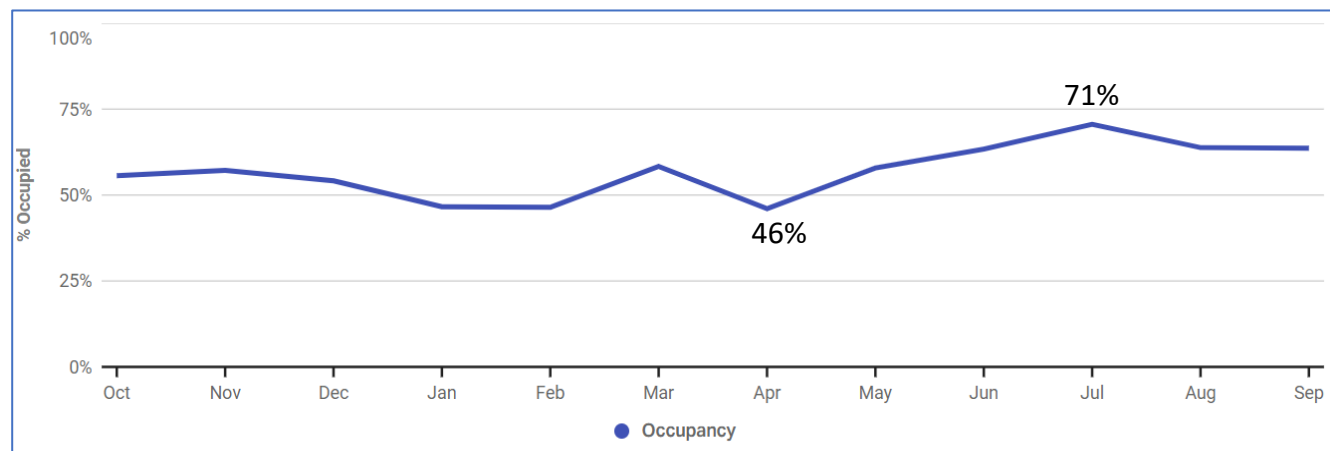
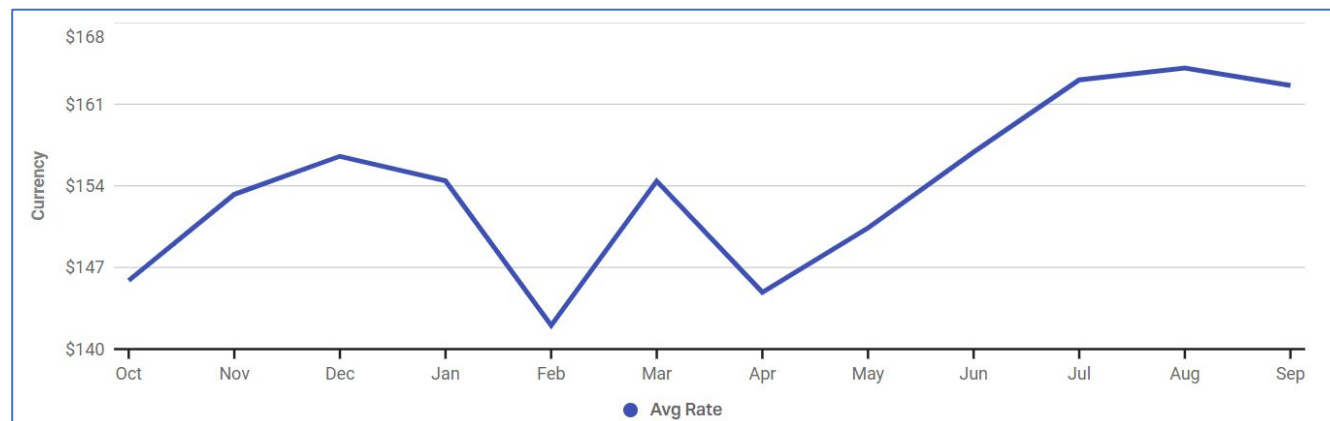
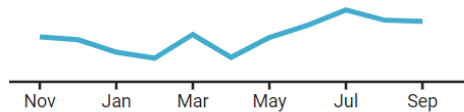
Average Daily Rate

\$158.7 +5% past year



RevPAR

\$90.7 -10% past year





Great Falls, MT STR Data – Annual Occupancy Trend 2015 - 2022

Annual occupancy is the percentage of available rooms sold during a twelve-month cycle; in this case we are looking at calendar year data.

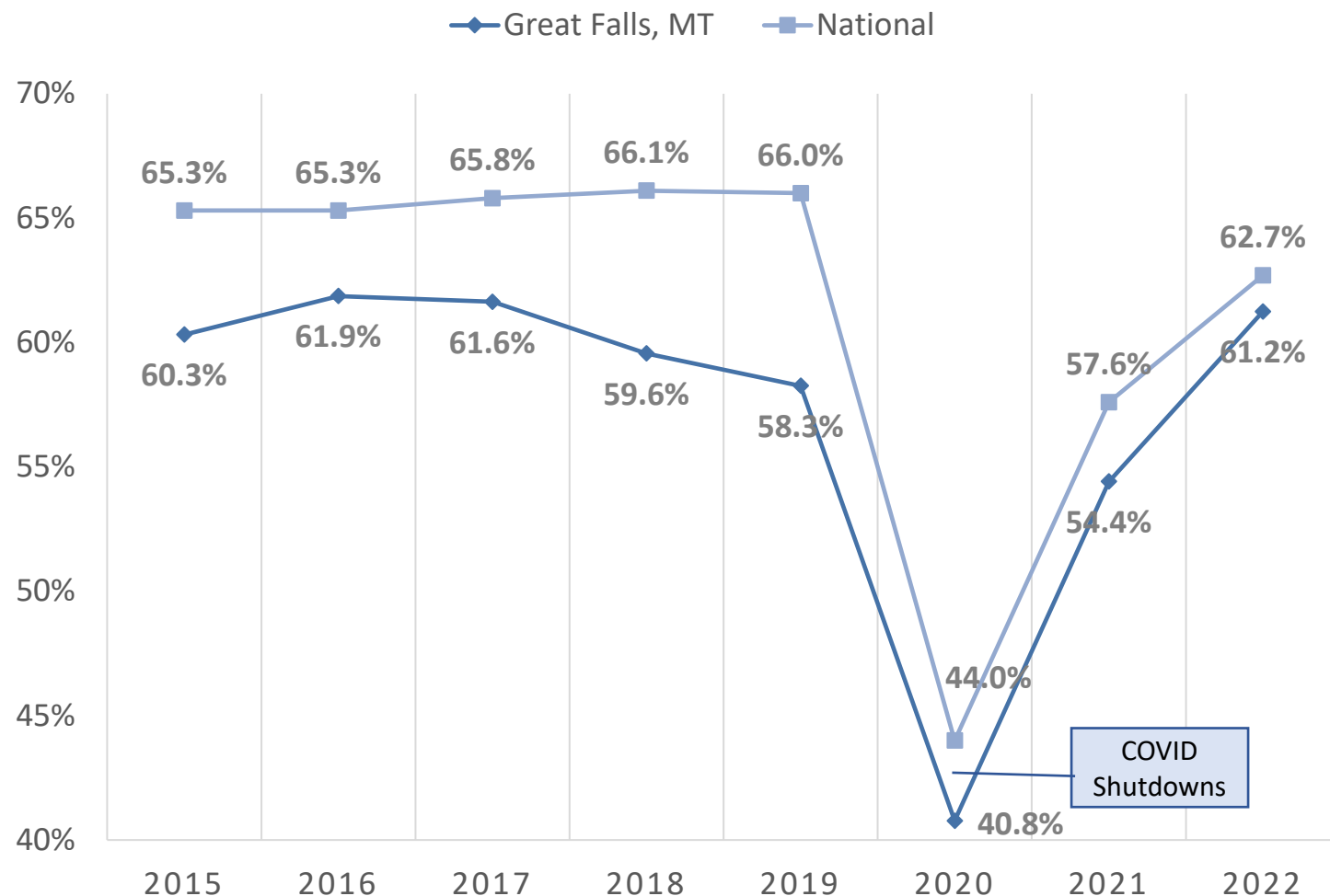
Occupancy = Rooms Sold / Rooms Available

Annual Occupancy Trend 2015 - 2022				
	Great Falls, MT	% of Chg	National	% of Chg
2015	60.3%	~	65.3%	~
2016	61.9%	2.6%	65.3%	0.1%
2017	61.6%	-0.4%	65.8%	0.7%
2018	59.6%	-3.4%	66.1%	0.4%
2019	58.3%	-2.2%	66.0%	-0.2%
2020	40.8%	-30.0%	44.0%	-33.3%
2021	54.4%	33.5%	57.6%	30.9%
2022	61.2%	12.6%	62.7%	8.9%

Observations:

- As expected, the COVID-19 pandemic had a major impact on Great Falls' annual occupancy in 2020.
- Great Falls' occupancy growth under-performed the national average in 2018 and 2019 after the Springhill Suites added 132 rooms to the room supply in April 2018.
- Great Falls recovery has stayed on pace with the national average while absorbing the 90-room supply growth from Mainstay/Sleep in August 2020.

ANNUAL OCCUPANCY TREND





Great Falls, MT STR Data – Monthly Occupancy

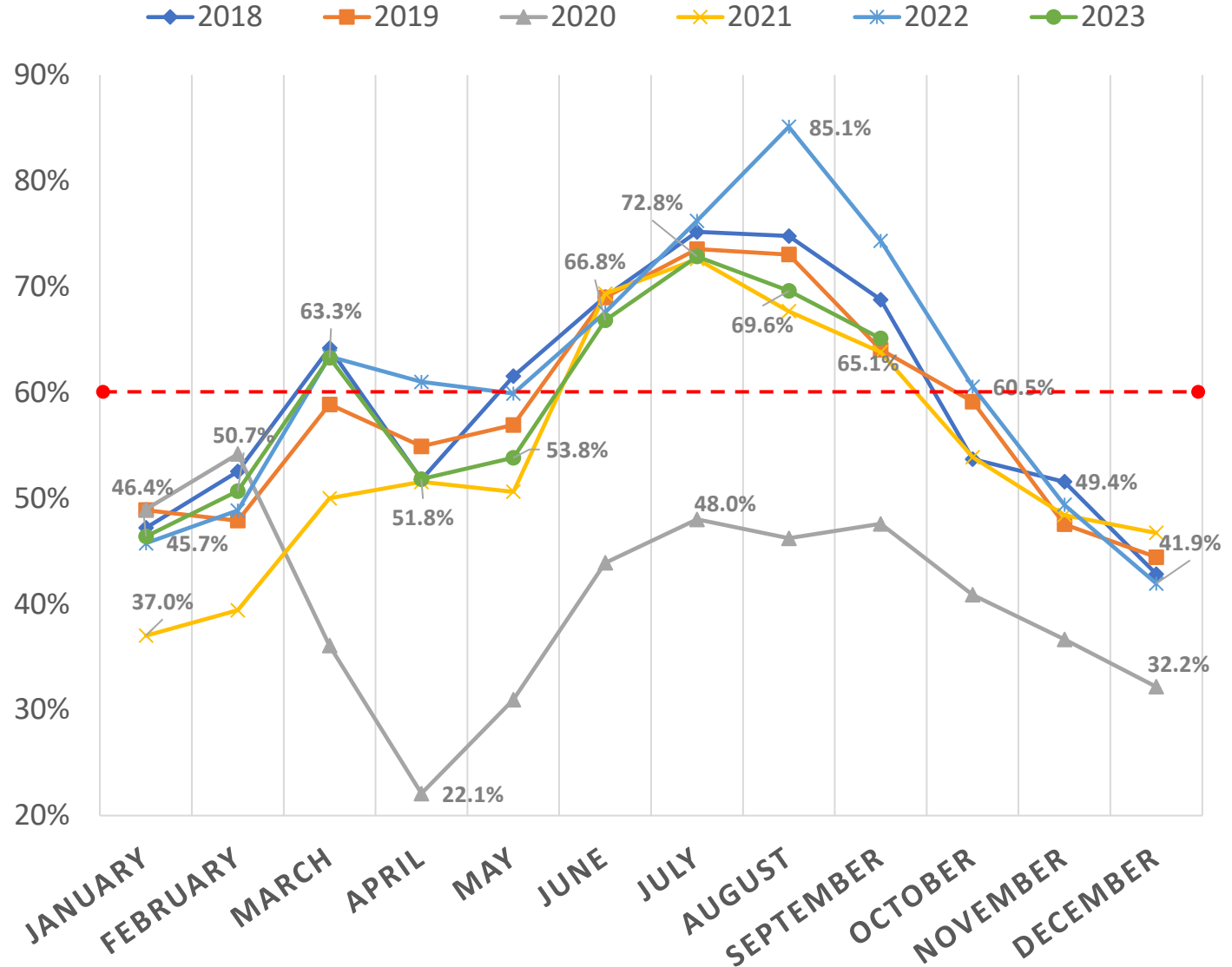
Monthly occupancy is the percentage of available rooms sold during each month of the year; in this case we are looking at five years of monthly data. The table above and chart on the right present the monthly lodging occupancy average Great Falls lodging properties reporting to STR 2018 – 2023.

	2018	2019	2020	2021	2022	2023
January	47.2%	48.9%	48.9%	37.0%	45.7%	46.4%
February	52.5%	47.9%	54.2%	39.4%	48.8%	50.7%
March	64.2%	58.9%	36.1%	50.0%	63.4%	63.3%
April	51.8%	54.9%	22.1%	51.6%	61.0%	51.8%
May	61.5%	56.9%	31.0%	50.6%	59.9%	53.8%
June	69.0%	69.0%	43.9%	69.3%	67.6%	66.8%
July	75.2%	73.5%	48.0%	72.6%	76.2%	72.8%
August	74.8%	73.0%	46.2%	67.7%	85.1%	69.6%
September	68.8%	64.0%	47.6%	63.8%	74.3%	65.1%
October	53.7%	59.1%	40.9%	53.9%	60.5%	60.5%
November	51.6%	47.5%	36.7%	48.4%	49.4%	49.4%
December	42.8%	44.4%	32.2%	46.7%	41.9%	41.9%

Observations

- Hotels occupancy stays above 60% June – October. The average room count for Great Falls hotels is 74. Therefore 60% occupancy equals 45 rooms sold and 29 unsold thus limiting the ability to bring large groups.

MONTHLY OCCUPANCY TREND





Great Falls, MT STR Data – Day of the Week 3-Year Trend

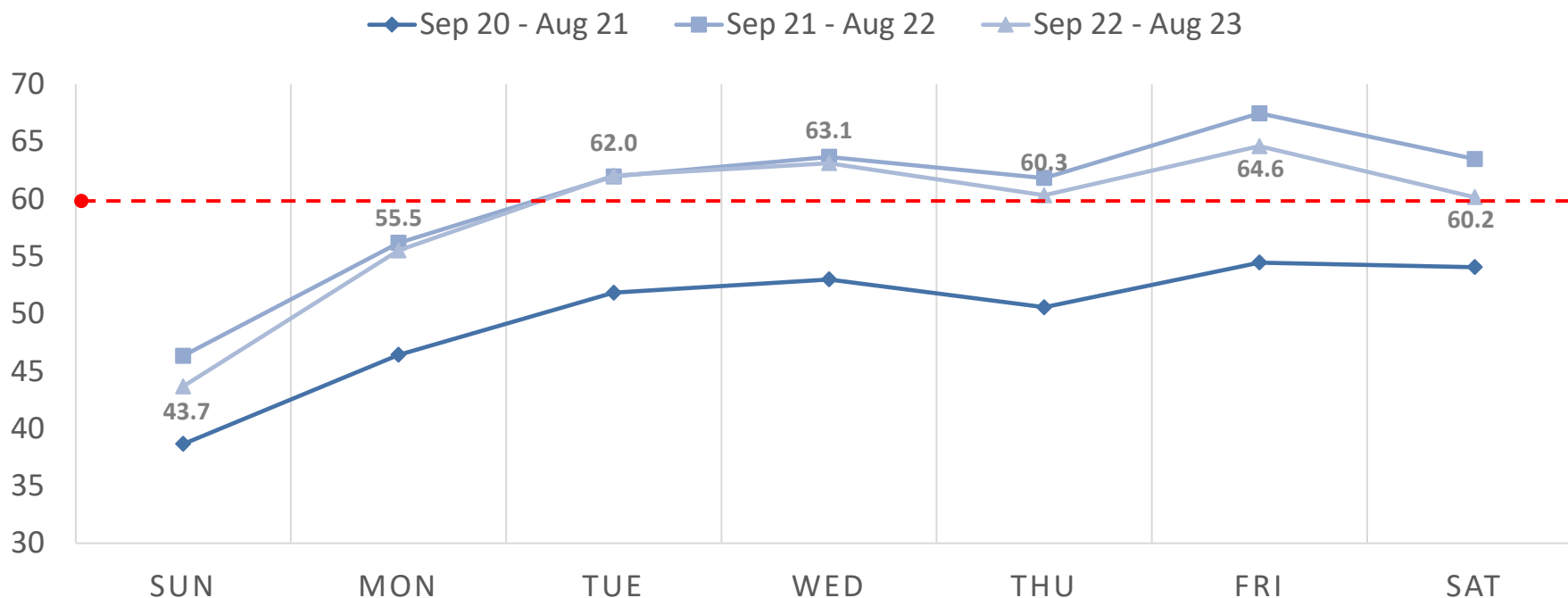
The STR data for Great Falls on this page shows the average occupancy by day of the week for the last three years.

Three Year Occupancy (%)							
	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Sep 20 - Aug 21	38.7	46.4	51.8	53.0	50.6	54.5	54.1
Sep 21 - Aug 22	46.3	56.2	62.0	63.7	61.8	67.5	63.5
Sep 22 - Aug 23	43.7	55.5	62.0	63.1	60.3	64.6	60.2
Total 3 Yr	42.9	52.7	58.6	60.0	57.6	62.2	59.3

Observations:

- Midweek occupancy is typically driven by business transient travelers September through May. Summer leisure travelers come every day of the week as part of their tours to the National Parks..
- Leisure/group demand is strongest on Friday nights.
- It is desired to have Friday and Saturday nights close to the same occupancy indicating consistent two-night stays on weekends.
- Sunday nights run the lowest occupancy which is typical of all destinations.

3-YR TREND
ANNUAL OCCUPANCY BY DAY-OF-WEEK





Great Falls STR Occupancy

The tables below represent monthly occupancy calendars for all STR reporting hotels in Great Falls from October 2022 through September 2023. Daily STR reporting hotel occupancy is heat mapped to reflect higher occupancies in shades of green and lower occupancies in shades of red. The darkest reds reflect the lowest occupancy days of the year while the darkest greens reflect the highest occupancy days of the year. Annual occupancy for 2022 was 62.2%.

2022 October - 60.5%

Sun	Mon	Tues	Wed	Thurs	Fri	Sat
						61.9%
49.6%	70.1%	73.7%	60.4%	60.3%	65.7%	64.9%
55.0%	55.9%	61.8%	63.7%	58.3%	63.8%	58.1%
45.8%	60.4%	64.8%	66.4%	79.7%	78.0%	70.2%
52.5%	60.3%	58.4%	54.9%	58.9%	62.8%	57.4%
38.1%	45.2%					

November - 49.4%

Sun	Mon	Tues	Wed	Thurs	Fri	Sat
		54.9%	57.8%	64.5%	60.1%	47.2%
45.4%	54.3%	52.1%	56.4%	54.1%	57.1%	52.5%
38.1%	62.7%	62.9%	55.3%	47.9%	46.1%	45.6%
32.5%	37.2%	38.4%	33.7%	42.5%	44.9%	36.4%
29.0%	50.7%	62.8%	58.3%			

December - 41.9%

Sun	Mon	Tues	Wed	Thurs	Fri	Sat
				50.2%	56.2%	47.8%
34.1%	45.5%	52.3%	47.1%	45.4%	58.1%	48.3%
32.9%	44.2%	48.1%	48.9%	58.6%	80.5%	54.7%
30.2%	37.0%	36.1%	28.9%	28.9%	31.3%	23.9%
23.5%	29.1%	35.4%	37.1%	33.7%	32.9%	38.9%

2023 January - 46.4%

Sun	Mon	Tues	Wed	Thurs	Fri	Sat
27.2%	27.8%	36.1%	37.1%	40.6%	53.1%	56.9%
30.4%	41.1%	47.3%	54.6%	53.9%	72.5%	81.9%
30.5%	41.0%	56.2%	60.5%	52.2%	49.3%	43.5%
29.8%	49.5%	59.8%	62.7%	52.5%	39.7%	39.4%
30.4%	39.1%	41.4%				

2023 February - 50.7%

Sun	Mon	Tues	Wed	Thurs	Fri	Sat
			44.6%	38.6%	43.8%	41.8%
30.5%	44.0%	45.9%	46.0%	56.8%	80.9%	58.3%
28.3%	38.2%	47.8%	59.9%	63.1%	56.6%	51.6%
39.0%	38.0%	48.7%	52.6%	57.5%	75.8%	78.3%
45.4%	53.6%	53.8%				

March - 63.3%

Sun	Mon	Tues	Wed	Thurs	Fri	Sat
			57.5%	66.1%	76.6%	57.8%
34.5%	47.1%	47.5%	73.3%	84.2%	89.0%	75.8%
34.8%	44.3%	52.5%	57.0%	66.6%	71.7%	66.6%
38.6%	52.1%	87.7%	83.6%	81.8%	80.9%	51.5%
37.3%	66.0%	72.0%	70.0%	54.1%	63.3%	

April - 51.8%

Sun	Mon	Tues	Wed	Thurs	Fri	Sat
						66.8%
45.0%	58.6%	58.8%	58.0%	49.6%	48.9%	42.1%
32.8%	48.1%	55.6%	57.7%	45.0%	48.4%	49.4%
33.9%	51.3%	57.4%	61.4%	45.5%	53.5%	52.2%
38.7%	56.6%	62.3%	59.0%	51.0%	69.8%	60.1%
36.8%						

May - 53.8%

Sun	Mon	Tues	Wed	Thurs	Fri	Sat
		57.3%	62.1%	58.6%	57.8%	60.5%
36.4%	50.0%	58.0%	56.2%	55.4%	46.2%	39.9%
32.8%	49.4%	67.2%	63.7%	62.7%	58.9%	54.4%
44.4%	50.6%	58.5%	60.8%	56.5%	64.6%	65.4%
48.7%	34.4%	48.5%	52.9%			

2023 June - 66.8%

Sun	Mon	Tues	Wed	Thurs	Fri	Sat
				55.9%	62.3%	58.6%
48.6%	73.6%	79.2%	71.7%	67.0%	76.2%	63.6%
44.8%	59.4%	69.7%	66.8%	59.8%	77.3%	74.8%
46.0%	63.0%	71.3%	80.1%	75.2%	71.4%	71.4%
58.4%	74.9%	82.4%	78.0%	61.1%	62.0%	

July - 72.8%

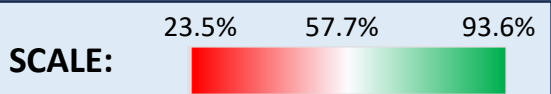
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
						62.2%
52.0%	49.5%	53.2%	62.8%	63.1%	72.1%	69.6%
61.8%	79.2%	84.8%	87.1%	78.7%	77.7%	79.9%
65.1%	77.8%	81.6%	78.4%	69.2%	66.5%	74.1%
67.7%	75.9%	90.3%	92.6%	84.9%	82.8%	82.0%
62.1%	73.6%					

August - 69.6%

Sun	Mon	Tues	Wed	Thurs	Fri	Sat
		79.8%	82.1%	74.3%	79.7%	80.5%
62.0%	75.8%	81.9%	80.5%	72.7%	71.3%	77.6%
57.9%	71.9%	72.1%	74.4%	69.4%	71.2%	66.1%
55.7%	66.7%	70.9%	74.7%	64.4%	64.4%	63.2%
47.5%	63.2%	67.9%	64.4%	53.3%		

September - 65.1%

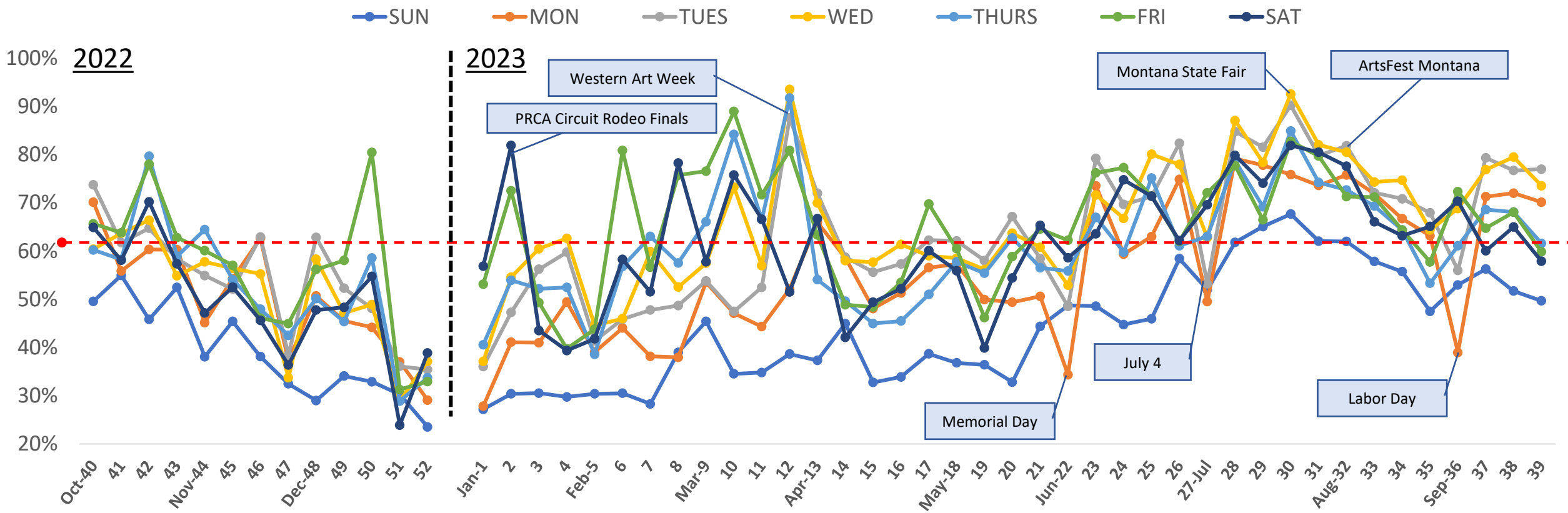
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
						57.7%
53.0%	39.0%	56.0%	68.8%	61.1%	72.4%	70.4%
56.3%	71.3%	79.4%	76.9%	68.6%	64.8%	60.1%
51.7%	72.0%	76.8%	79.5%	68.1%	68.1%	65.0%
49.7%	70.2%	77.0%	73.6%	61.6%	59.8%	57.9%



Great Falls STR Data – Daily Occupancy

52-Week Occupancy % Trend

October - December 2022 & January - September 2023



Daily Occupancy %'s	# of days	% of YR
Days reported at 60% - 69%	78	21.7%
Days reported at 70% - 79%	58	13.5%
Days reported at 80% - 89%	24	9.6%
Days reported at 90% - 100%	4	2.2%

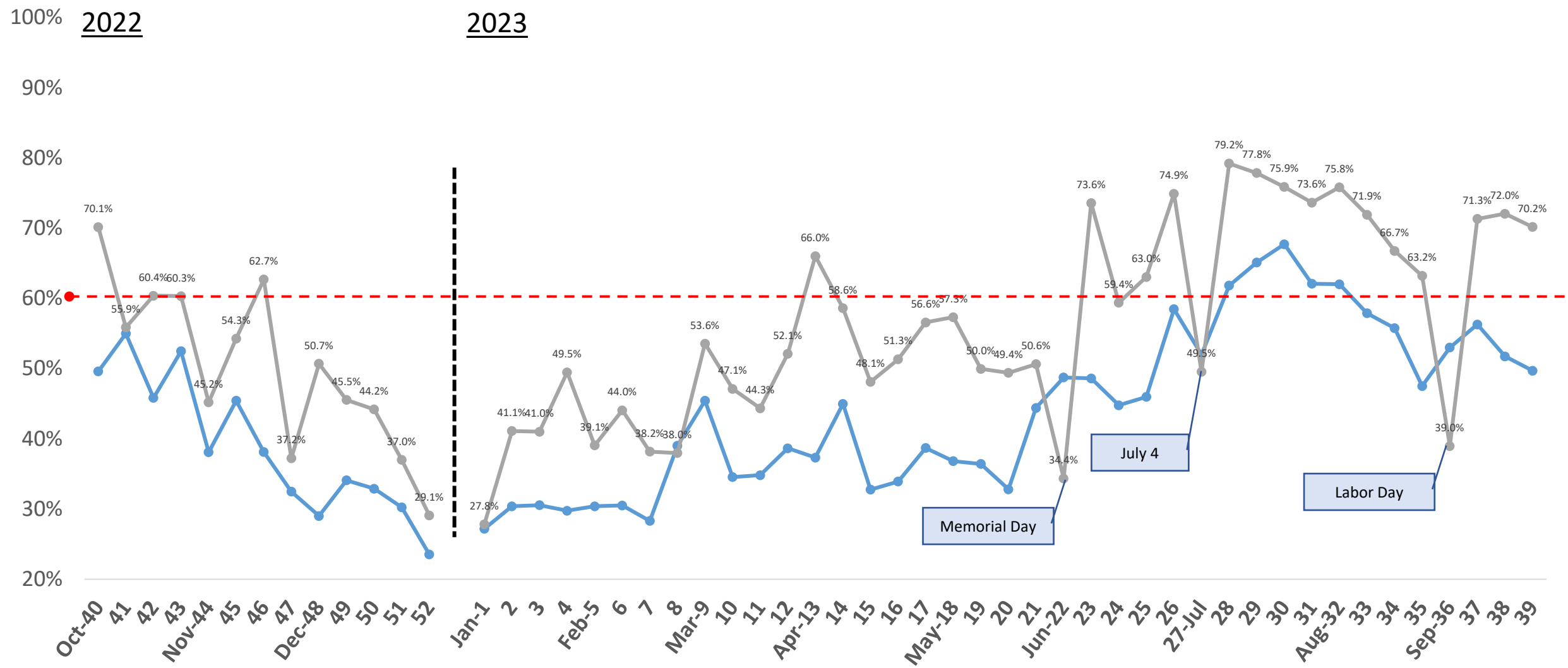
Total # of Days 60% or higher occupancy 164 nights = 45.1% of the year



Sunday - Monday Occupancy % Trend

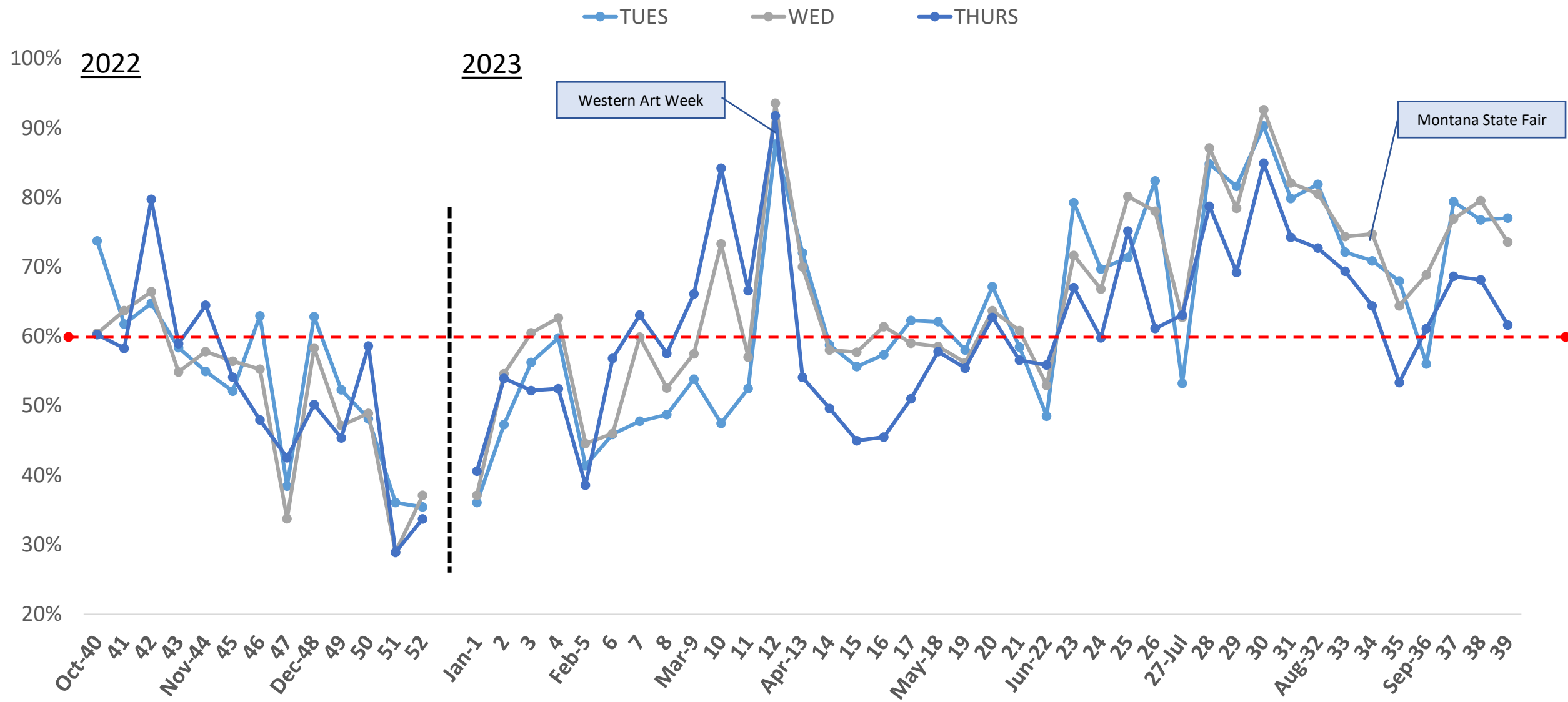
October - December, 2022 & January - September, 2023

SUN MON



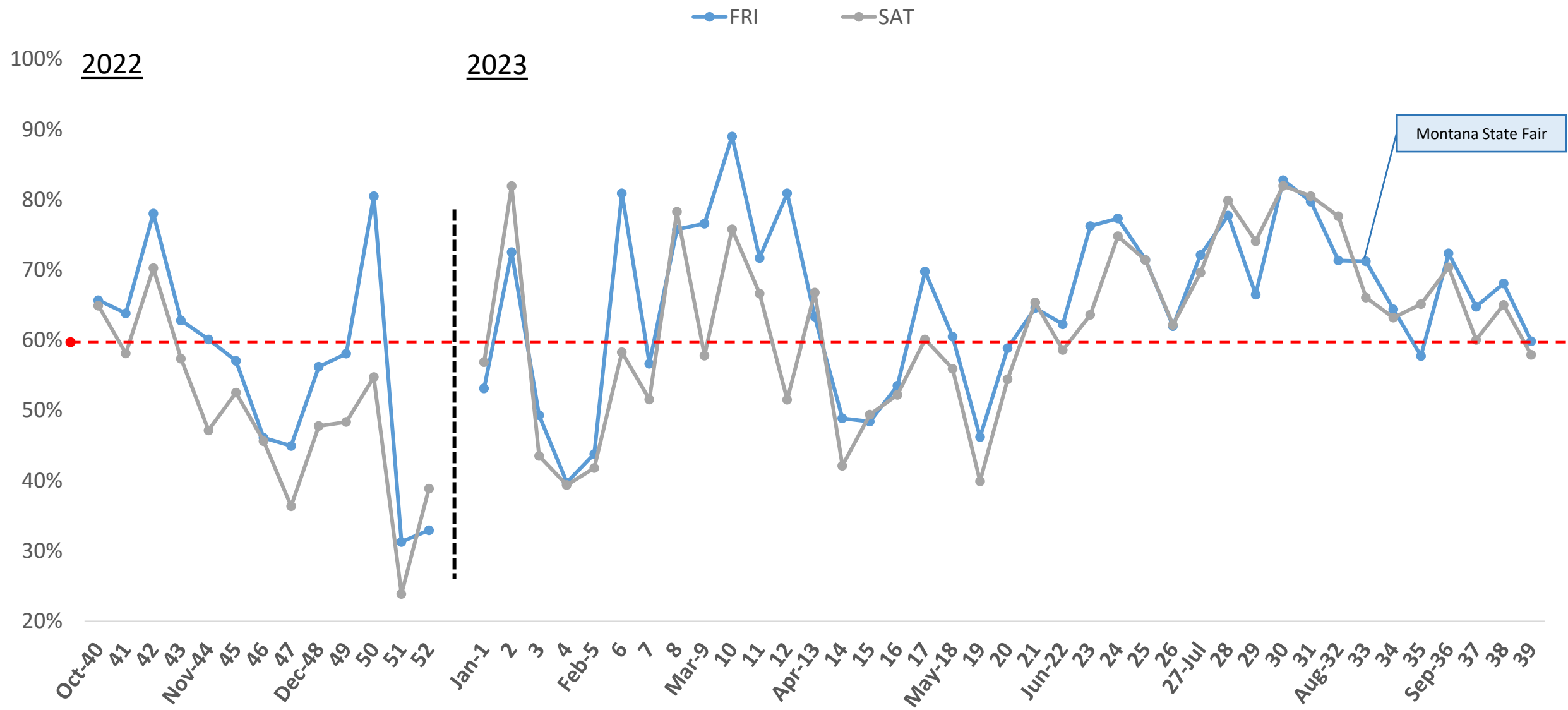


Midweek (Tuesday - Thursday) Occupancy % Trend October - December, 2022 & January - September, 2023



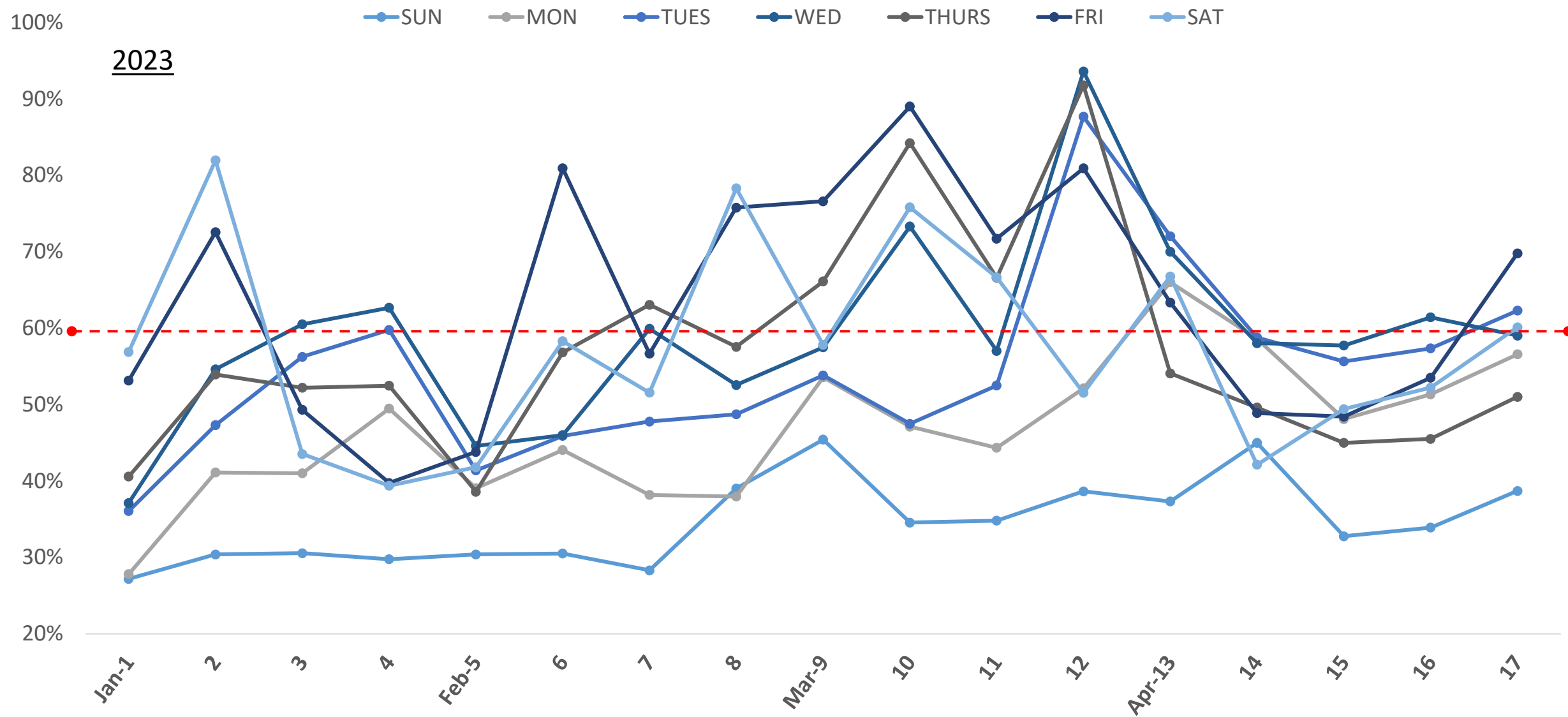


Weekend (Friday - Saturday) Occupancy % Trend October - December, 2022 & January - September, 2023



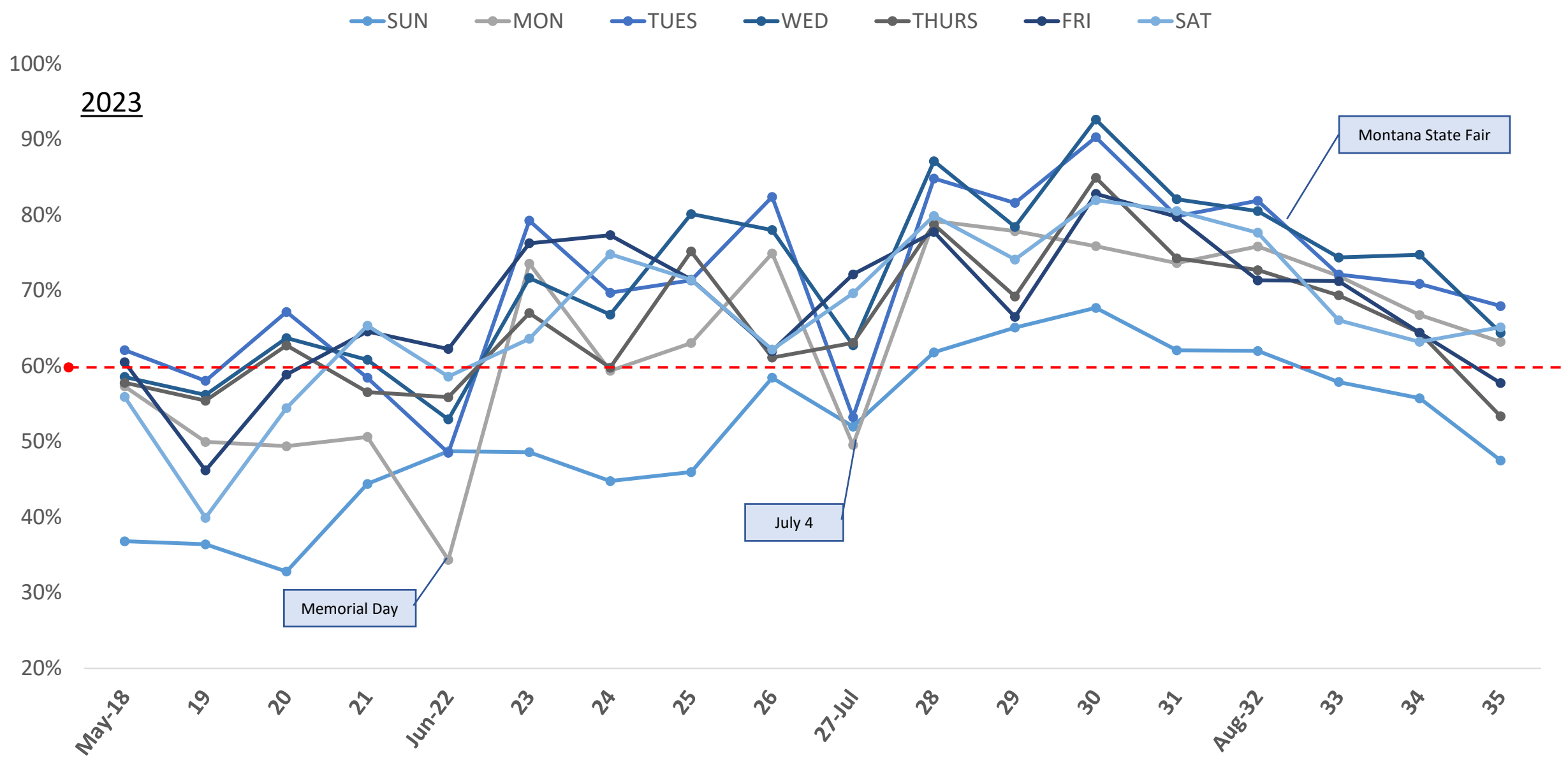


Occupancy % Trend January - April 2023





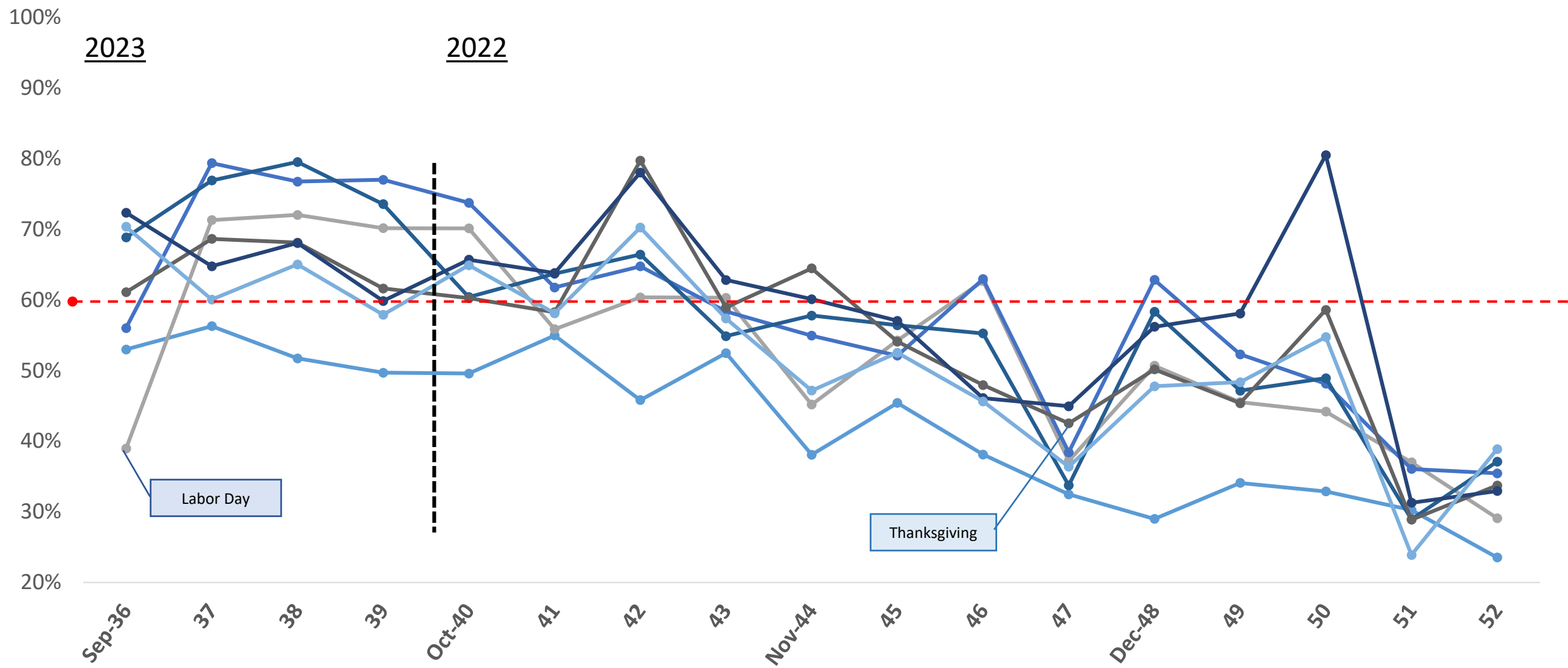
Occupancy % Trend May - August 2023





Occupancy % Trend September 2023 & - October - December 2022

SUN MON TUES WED THURS FRI SAT





Great Falls STR Data – ADR & RevPAR

Annual ADR is reported by the hotels as the Average Daily Rate paid for the rooms that were occupied.

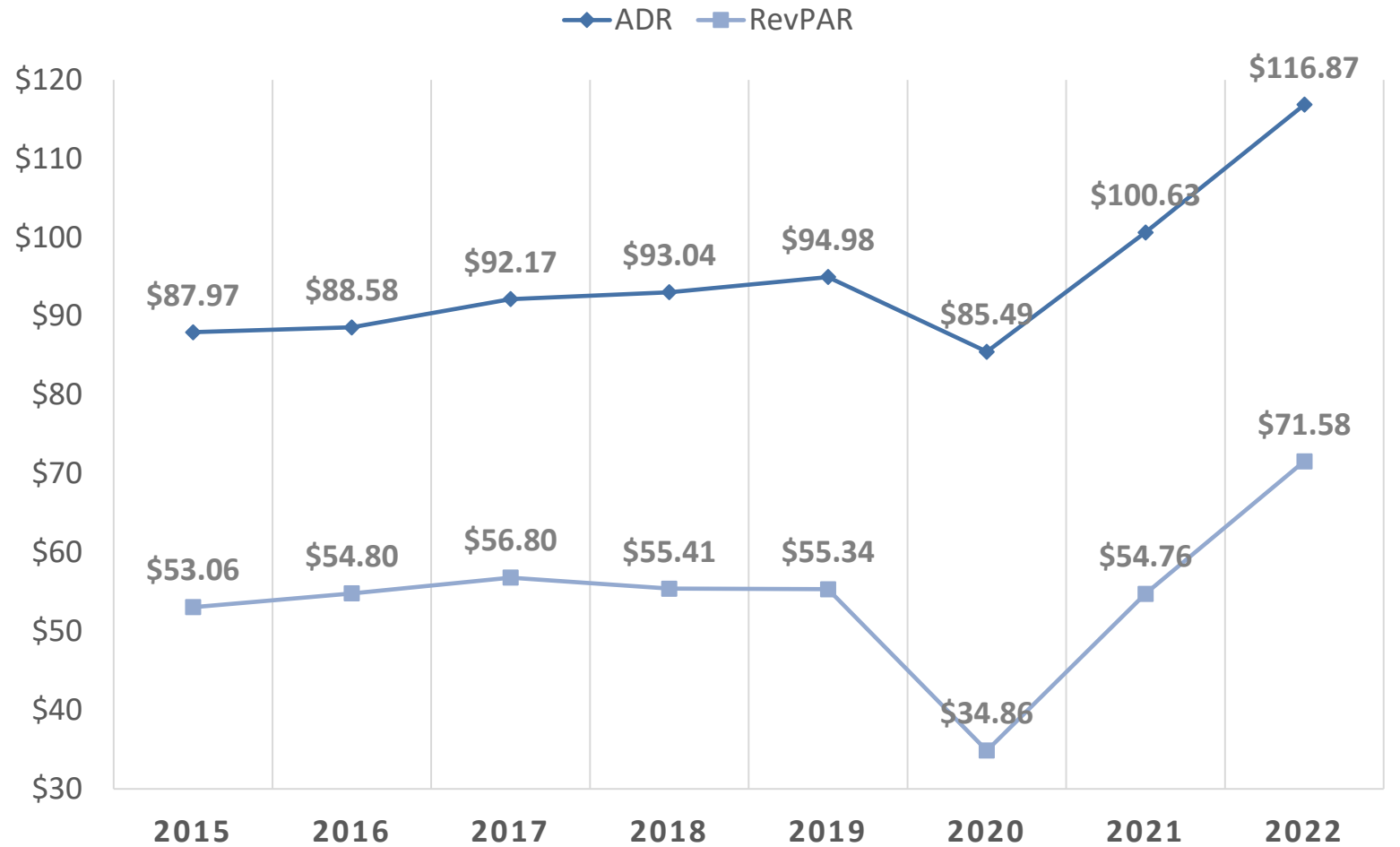
RevPAR (Revenue Per Available Room) is calculated as the gross room revenue divided by all the rooms available.

ADR vs. RevPAR 2015 - 2022				
	ADR	% of Chg	RevPAR	% of Chg
2015	\$87.97	~	\$53.06	~
2016	\$88.58	0.7%	\$54.80	3.3%
2017	\$92.17	4.0%	\$56.80	3.6%
2018	\$93.04	0.9%	\$55.41	-2.5%
2019	\$94.98	2.1%	\$55.34	-0.1%
2020	\$85.49	-10.0%	\$34.86	-37.0%
2021	\$100.63	17.7%	\$54.76	57.1%
2022	\$116.87	16.1%	\$71.58	30.7%

Observations:

- The data herein shows that the reporting hotels consistently increased their rates prior to the pandemic and accelerated rate growth in 2021 and 2022.
- **RevPAR factors in demand and the daily rate paid.** RevPAR experienced a drastic dip in 2020 with the COVID-19 restrictions but has steadily recovered to dramatically surpass pre-pandemic levels in 2022.

ADR VS REVPAR TREND





Great Falls STR Data – Annual Revenue

STR Hotel/Motel 8-YR Annual Revenue Trend

STR reports the total annual lodging revenue generated by Great Falls STR-participating properties over the 8-year period 2015-2022 as follows in the table and below.

Annual Revenue Trend		
2015-2022		
	Revenue	% Chg
2015	\$ 32,342,511	~
2016	\$ 33,845,697	4.6%
2017	\$ 35,076,996	3.6%
2018	\$ 36,210,195	3.2%
2019	\$ 36,811,669	1.7%
2020	\$ 22,673,460	-38.4%
2021	\$ 38,023,398	67.7%
2022	\$ 49,950,872	31.4%



Observations:

- The table above and chart to the right illustrate the annual lodging revenue generated by the hotels that report to STR.
- The variance between the revenue reported by the STR reporting hotels and total Great Falls lodging revenue identifies the ratio of revenue from STR and non-STR lodging properties.



Great Falls Lodging Market Guest Segmentation – YSI/RS Hotel Survey of Hoteliers

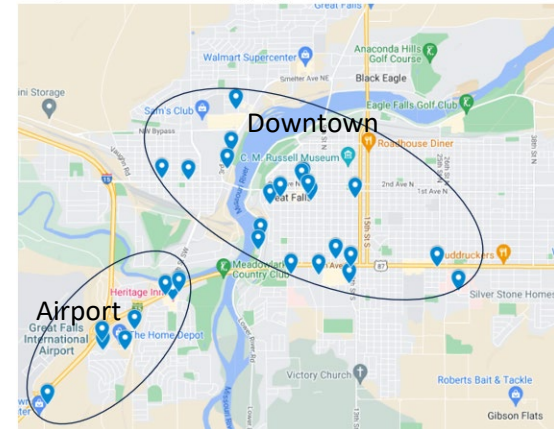
YS/RS developed and deployed a survey to Great Falls lodging managers in the Visit Great Falls database. The Great Falls Tourism hotel/motel database included 32 properties with approximately 2,375 rooms actively collecting lodging tax at the time of the YSI/RS lodging study. Of these properties, **17 of the 32 properties representing 1,707 rooms participated in the YSI/RS survey which provided an overall response rate of 71%**. The response is a reliable and predictive sample of the overall market, based on the size and geographic distribution of the Great Falls hotel/motel lodging inventory. Business transient and group/conference/meeting guests are tracked closely at the front desk by rate codes, while leisure segment data is often collected by the management team at the individual properties. The response data is also segmented to show airport and downtown hotels response.

Market Segmentation - 2023	ALL	Airport	Downtown
Lodging Properties / Room Inventory	31 / 2292	9 / 853	22 / 1439
Lodging Properties / Room Response	17 / 1624	8 / 794	9 / 830
Response Percentage	70.9%	93.1%	59.5%
Transient (306,454 room nights)	71.7%	61.6%	79.5%
Business transient (individual business travelers)	30.8%	25.9%	34.6%
Leisure transient (visiting attractions, shipping, visiting friends & relatives, passing through, etc.)	28.5%	24.4%	31.7%
Skilled workers (commercial, construction, laborers, etc.)	12.4%	11.3%	13.2%
Group / Conference / Meeting (114,119 room nights)	26.8%	35.0%	20.4%
Conferences / meetings	8.7%	10.5%	7.2%
Team sports (tournaments)	6.5%	10.4%	3.3%
Military	5.4%	5.6%	5.2%
SERF (Social, Educational, Religious, Fraternal)	4.0%	4.9%	3.3%
University related	2.4%	3.6%	1.4%
Other (reported as walk-in)	1.5%	3.3%	0.0%

Observations:

- Great Falls is a transient lodging market; far more so than a group market.
- The segmentation survey data herein reveals the vast majority of rooms (71.7%) are driven by transient demand with downtown hotels garnering more transient business than the airport corridor.
- Business transient is the largest single segment overall and in the two geographic subsets.
- Two-thirds of the airport room demand is transient, one-third is driven by groups with a tie between conference/meetings and team sports.
- Malmstrom Inn & Suites is a hotel exclusively for MAFB travelers that runs high occupancy, absorbs most of the military room demand in the market, is except from lodging taxes and is therefore not included in this data.

Map of Great Falls Lodging properties



Great Falls Survey Response – Open Ended Questions

Hoteliers were asked to report any anticipated changes in room demand.

8 properties responded:

- 2022 was a record year and I expect 2023 and beyond to be back to evened out.
- Depends on the economy and world events. I anticipate that we'll be on track for the same if economy stays the same.
- No. (2)
- Not at this time, waiting until overall economy improves. Business travel has declined.
- Room demand will probably be lower due to Calumet not working on refinery.
- Seasonally adjusted. Heavy occupancy in Summer (April-September); lower in winter months. Also depends on what is happening on base and what groups/individuals are visiting.
- Unsure... still up and down from COVID time but groups are returning again which is good news.

Leisure Feeder Markets

Hoteliers were asked which cities/regions ranked as the top leisure feeder markets in the last year.

Twelve properties responded, rank order below:

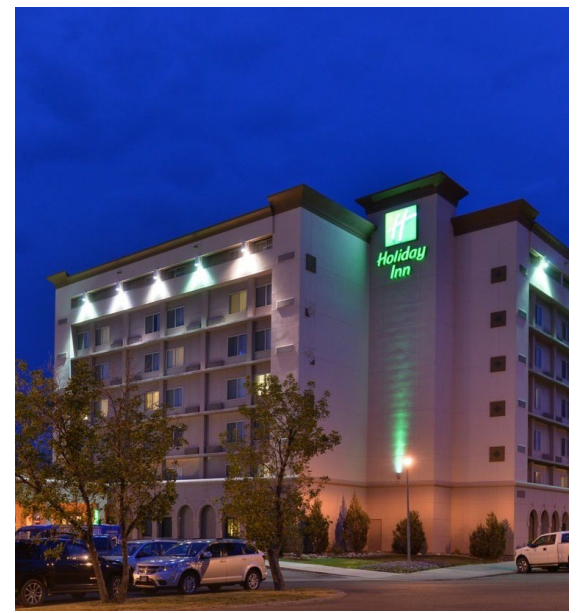
1. Missoula (3)
2. Montana (3)
3. Washington (3)
4. Alberta (2)
5. Billings (2)
6. Idaho (2)

Group Market Segment- Priority Ranking

Hoteliers were asked to rank the following group market segments to indicate priority order for Visit Great Falls future sales and marketing efforts.

14 properties responded, rank order below:

1. Corporate
2. Association
3. Team Sports
4. Group Tour / Motorcoach
5. Military
6. SERF
7. University-related



First-time Bookings

Hoteliers were asked to report the best source for first-time bookings, where visitors were learning about their property.

14 properties responded:

- | | |
|-----------------------------------|---|
| • Brand internet | • OTA |
| • ChoiceHotels.com | • OTA's, website, Google |
| • Corporate accounts | • They hear about the Sip 'n Dip and stay for that. |
| • Expedia | • They must call to make a reservation. |
| • Google, Expedia, or other OTA. | • Referrals and online websites |
| • Hotel website | |
| • IGH.com | |
| • Online and walk-in | |
| • Online searches and TripAdvisor | |



Great Falls Survey Response – Open Ended

Hoteliers were asked report the percentage of typical travel parties that were adults only, walk-in and non-taxable:

15 properties responded, average response below:

- Adults only: 73%
- Walk-in (no advance reservation): 19%
- Non-taxable rooms: 14%

What is the biggest challenge in marketing your lodging property?

12 properties responded:

- Awareness
- Being independent (2)
- Cost usually
- Figuring out if the marketing is actually working
- Keeping up on media outlets that are currently effective and knowing which markets to focus on
- Knowledge of capacities
- No challenge, just part of the job to find new channels
- Not in charge of marketing
- Teams love us however we do not have enough rooms with two beds.
- Time where we have space available as we have several large groups return year after year it can be hard to add in new groups
- We are a small independently owned hotel, which a limited number of rooms.

Suggestions

Hoteliers were asked how Visit Great Falls can assist their property or for opportunities in terms of sales and marketing in the coming year:

10 properties responded:

- Continue doing what you’re doing.
- Continue trying to get new events and groups for the city.
- I would like to see a return of the “Hot Ticket” of some sort. It would be nice to have a monthly or bimonthly “Events” flyer that is spread around town and marketed digitally. This would help spread the word on all the events going on around town and also helps give guests options on what they can participate in.
- Increasing established groups that are willing to host their events in Great Falls. Promote that we are centrally located to groups. Focus on marketing campaigns that capture the attention of Gen-X and Millennials. Increase city events and promote effectively.
- It would be great if they could recognize the limitations of our property in event space and sleeping rooms available for groups. The maximum event space will only accommodate up to 250 without breakouts and separate rooms for meals. 40% of our rooms are transient protected so we can only offer 60% of our rooms to groups.
- Keep asking for room blocks.
- More corporate business summits or meetings or something big like the BMW event.
- Some tour groups or smaller conferences- 30 rooms or less
- Work towards a bigger picture of what Great Falls is as a destination and not individual events.



Visitor Survey & Profile Research

Methodology

An online survey instrument was developed and prepared for distribution by the YS/RS research team and approved by VGF. The survey was deployed through web-links provided to VGF and their industry partners. Additionally, a panel of respondents was procured from across the United States & Canada. The data on this page reveals the demographic profile of the visitor survey respondents.



Methodology

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Survey Respondent Demographics

- Average age: 39.4 years old. Range: 18 – 80
- Female 54%, Male 46%
- Education: 74% have some college education.
- Occupations: Professional, retired, self-employed
- Household income: \$50-\$99K = 41%; \$100K - \$200K = 26.4%
- Ethnicity: white/Caucasian=67%; Hispanic/Latino=18.7%; African-American = 13.5%
- Point-of-origin: all 50 states & Canada; Top states= MT, ID, OR, WA, AZ, CA, CO, TX, SD

Desired type of travel destinations: Mountains, lakes, beach, National Park, Active outdoors

Top desired activities: Nature/scenery site seeing, accessibility, Outdoor recreation, arts/culture

Typical travel party to Great Falls: 2 or 4 people, mostly adults without kids, traveling by car

First-time visitors = 1/3; Repeat visitors 2/3

Main trip purpose: getaway/long weekend with family/friends, visiting friends/family (MAFB)

Length of stay = average 3 nights

Average Spending per travel party: \$1,495

Top activities in Great Falls: Shopping, nap, scenic drive, wildlife watching, craft beverage, picnic, museums, hiking, swimming, camping, art galleries, festivals/events

Top attractions: The Falls/dam, Lewis & Clark IC, First people BJ, Giant Springs SP, Children’s Museum, Tower Rock, The History Museum, River’s Edge Trail, Smith River SP, Paris-Gibson, Sip n’ Dip, CM Russell Museum

Top activities outside of Great Falls: Yellowstone NP, Glacier NP, Billings, Bozeman, Helena

Trip satisfaction: 4.5 on a 5-point scale (very high).

Highest rated amenities: Variety of Outdoor experiences, unique local dining, lodging value



LAST NIGHT in GREAT FALLS –Impact from Overnight Stays

	31 LODGING PROPERTIES with 2,292 HOTEL ROOMS 61.2% ANNUAL OCCUPANCY (STR)	➔	1,403 rooms occupied
	Average daily rate = \$116.87 (STR)	➔	\$163,969 Average lodging revenue per night
	Average travel party size = 3.6 PEOPLE (YSI/RS visitor survey)	➔	Average overnight visitor count in hotels in Great Falls per night = 5,051
	Average spending per person, per visit = \$115 (YSI/RS visitor survey)	➔	\$580,865 Average daily expenditures
VISITOR SPENDING ESTIMATE PER NIGHT IN GREAT FALLS =			
\$580,865			
ANNUAL OVERNIGHT VISITOR SPENDING ESTIMATE IN GREAT FALLS =			
\$212,015,725			



Visitor Survey Respondent Demographics

**VISITOR
SURVEYS
N=1,541**

INCOME

ESTIMATED HOUSEHOLD INCOME

- \$0 - \$24,999 – 10.3%
- \$25,000 - \$49,999 – 16.4%
- \$50,000 - \$99,999 – 41.0%**
- \$100,000 - \$149,999 – 17.5%**
- \$150,000 - \$199,999 – 8.9%
- \$200,000 - \$249,999 – 3.6%
- \$250,000 + - 2.2%

OCCUPATION

WHAT IS YOUR OCCUPATION?

Top reported:

- Retired – 11.7%**
- Self-employed – 10.3%**
- Executive/manager – 8.8%
- Healthcare industry – 8.8%
- Professional/technical – 6.3%

AGE

AGE RANGE

Average age: 39.4 Years old

18-29 (30.5%), 30-39 (29.6%), 40-49 (16.0%), 50-59 (9.5%), 60-69 (9.2%), 70-79 (4.6%), 80+ (0.5%)

GENDER

TO WHAT GENDER DO YOU IDENTIFY?

- Female – 54.4%**
- Male – 45.8%
- 0.5% Prefer not to answer

EDUCATION

74% have some college education

- Advanced degree 12.1%
- Bachelor's degree 26.1%**
- Some college 22.2%**
- Associate degree 13.2%
- High school graduate 19.0%
- Trade/Technical school 5.1%
- Less than high school 2.3%

ETHNICITY

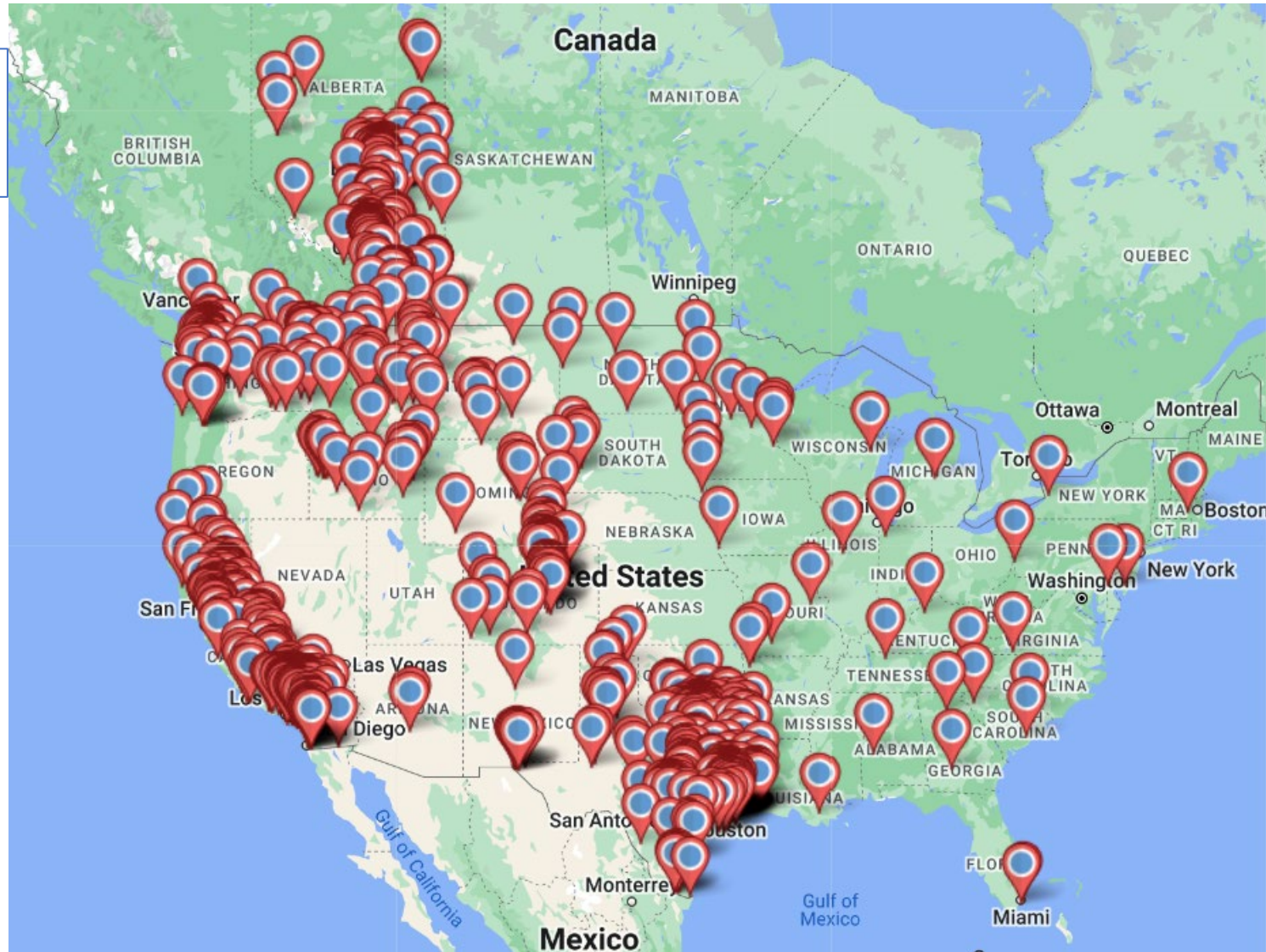
WHAT IS YOUR ETHNICITY?

- White / Caucasian - 66.9%**
- Hispanic/Latino - 18.7%**
- Black / African-American – 13.5%**
- Asian or Pacific Islander – 7.6%
- American Indian / Alaska Native – 3.7%
- Prefer not to answer - 2.0%



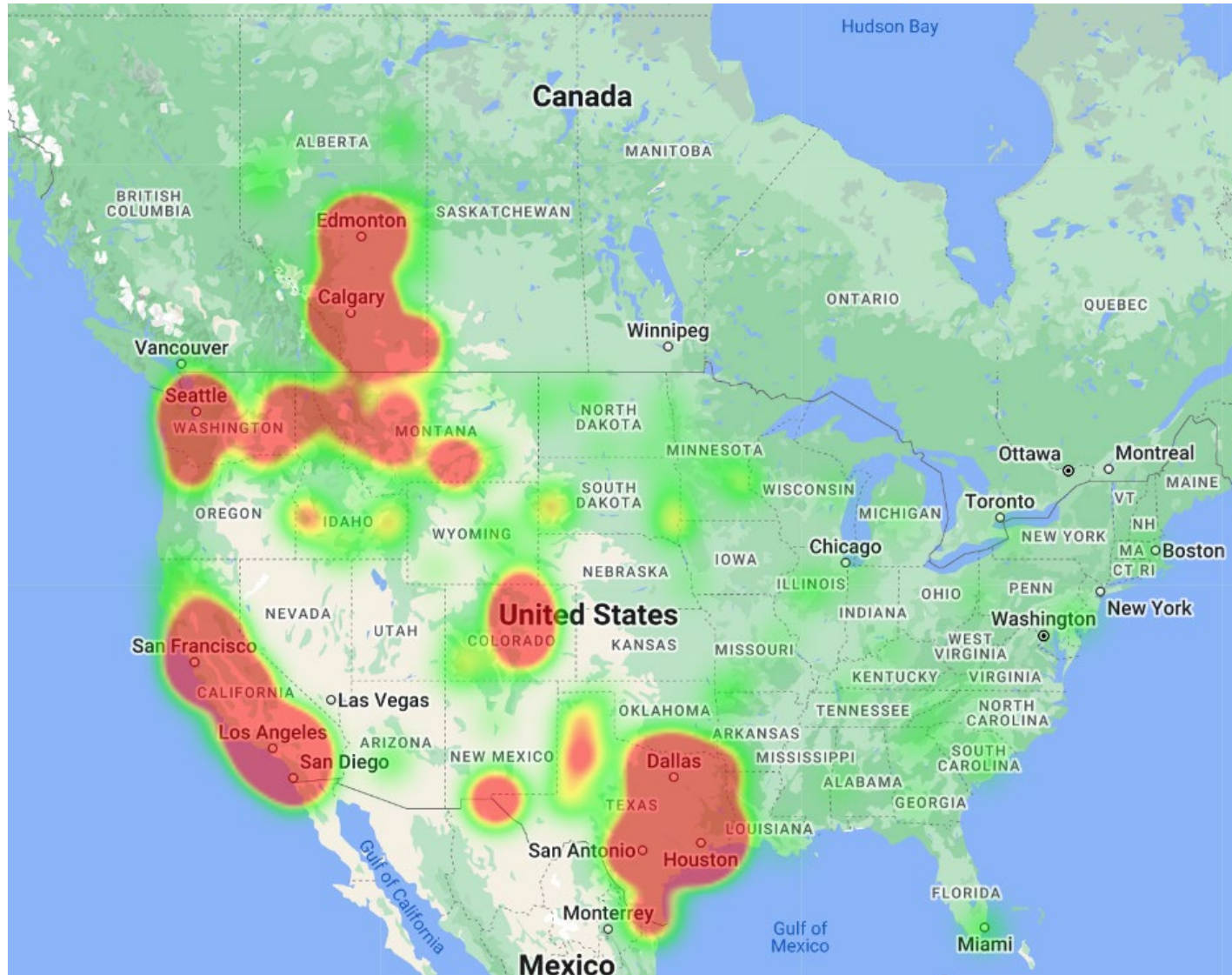
Visitor Study – Respondent Point-of-Origin

Pin map showing visitor respondent points of origin by zip codes



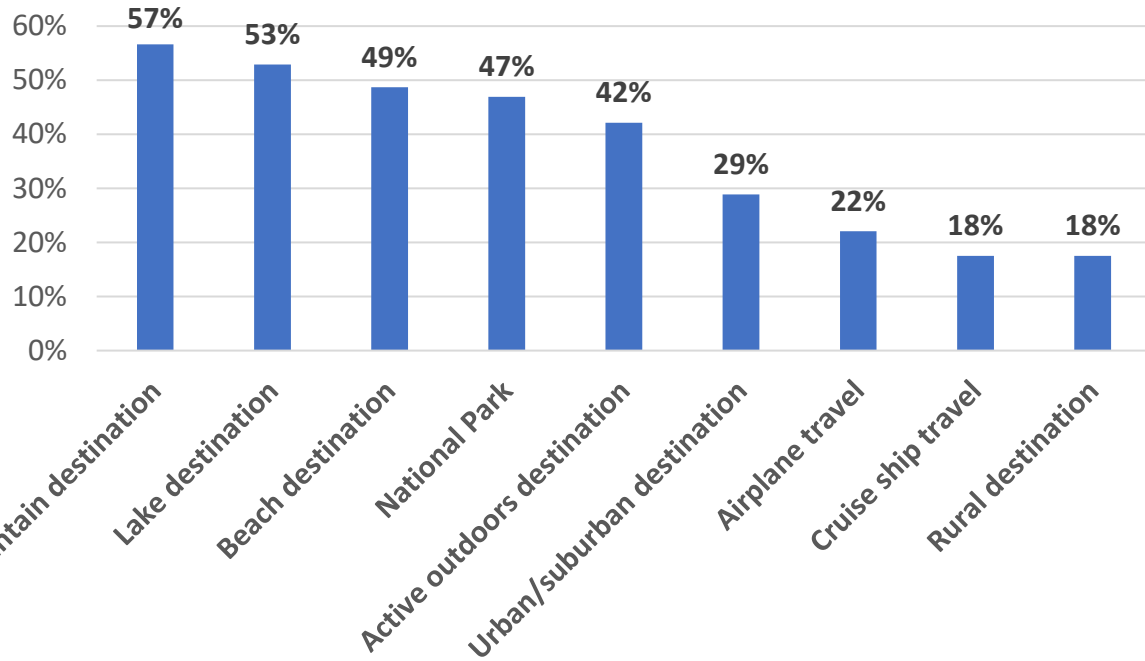


Heat map showing visitor respondent points of origin by zip codes

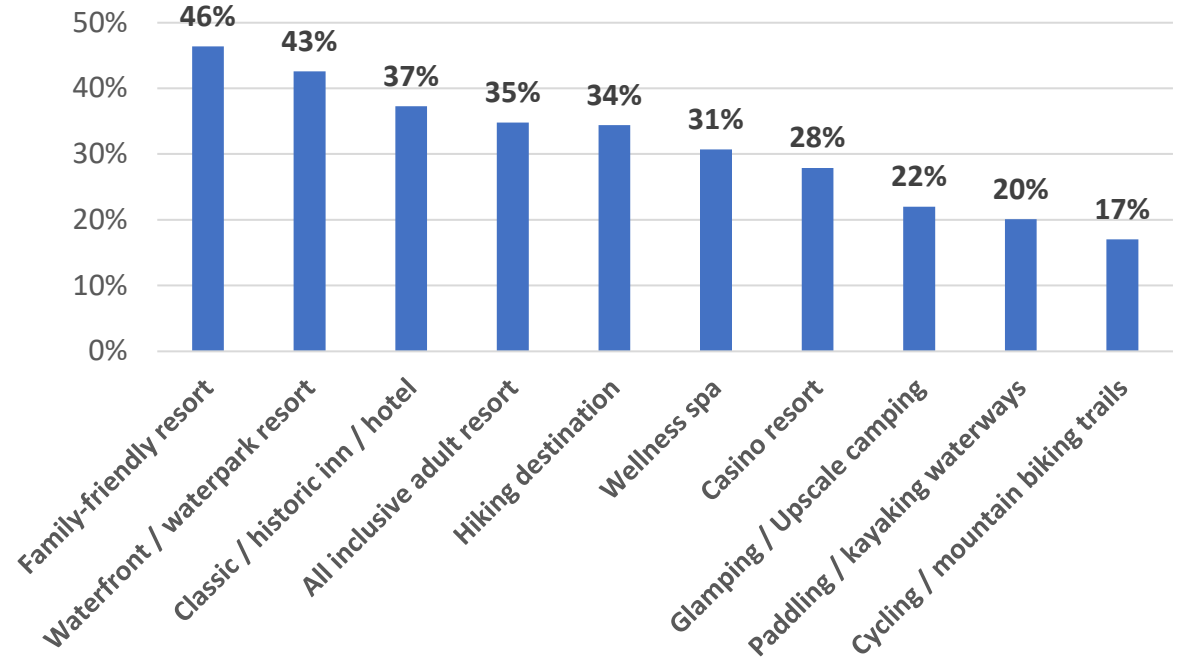




When looking for a vacation or getaway, which types of destinations are most appealing? n=1398



When looking for a vacation or getaway, please check ALL that are of interest? n=1382



Observations:

- Travelers continue to seek getaways in the great outdoors, such as what Great Falls and Montana offer.
- More than 40% of survey respondents are seeking scenic and active destinations with mountains, lakes, state and national parks, and beaches.
- For lodging, most travelers still want comfortable amenities such as resorts and historic inns.
- Most travelers are seeking "lite" outdoor activities and adventures, while a smaller minority are interested in more intense activities.



Level of importance for each of the following attributes when selecting a getaway destination. Rated 1-3 scale(1 is unimportant, 3 is very important) n=1494

Attribute	Rating
Nature, beautiful scenery	2.8
Accessibility	2.5
Outdoor recreation (hiking, biking, etc.) / parks	2.5
Arts / Culture	2.3
Museums / heritage activities	2.3
Evening entertainment	2.3
Festivals / events	2.3
Water activities / river adventures / water park	2.3
Unique shopping	2.3
Good food / unique dining	2.3
Family / kid friendly	2.3
Agriculture tourism	2.1
Hunting / fishing	2.0
Sports	1.9

Top sources for information when planning a getaway n=1496

1. Search engine (Google, Bing, Edge, etc.) 56.8%
2. Online Travel Agency (TripAdvisor, Orbitz, Expedia, Kayak, etc.) 50.0%
3. Friends/family 47.7%
4. Destination website or travel guide 39.1%
5. Social media 28.2%



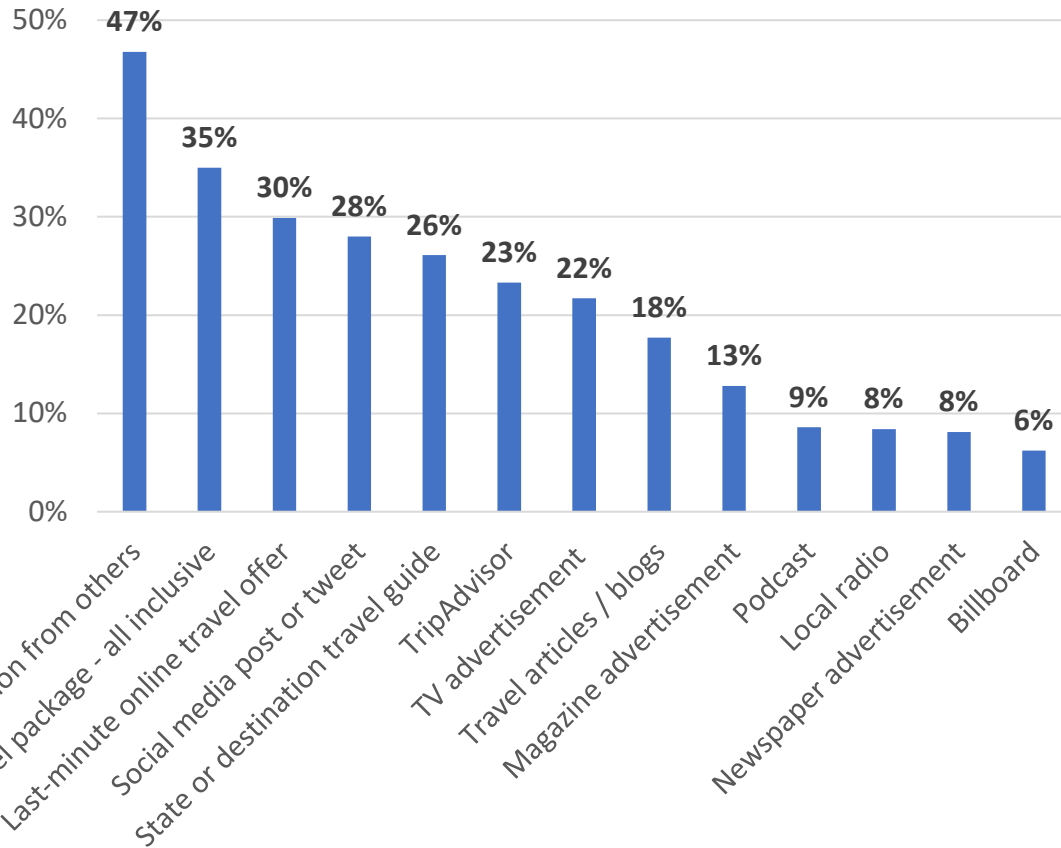
Observations:

➤ The data herein confirms that travelers are looking for those attributes for which Great Falls is most able to deliver. The top ten most desired attributes are Great Falls' “strong suit”.



What would inspire you to visit Great Falls?

n=1396



Please tell us if any of the following activities / experiences would appeal if offered in Great Falls? n=1691

Activity / Experience	Extremely (4)	Very (3)	Somewhat (2)	Not at all (1)	Rating
Foodie experience / events with unique local cuisine	45.9%	33.3%	15.7%	5.1%	2.2
Dining in scenic locations	44.0%	36.6%	16.7%	2.7%	2.2
Cultural events (i.e. theater, live performances, concerts)	42.6%	31.0%	20.8%	5.6%	2.1
Farm-to-table fine dining with pop up locations	36.7%	34.1%	22.2%	7.1%	2.0
Guided tours of unique local experiences	37.2%	33.4%	22.6%	6.8%	2.0
Themed experiences (culinary classes, paint and pour nights, etc.)	35.2%	31.2%	22.5%	11.1%	1.9
Unique event spaces (weddings, life events, etc.)	30.1%	28.0%	27.7%	14.2%	1.7

Observations:

- Travelers are increasingly seeking unique, quality local experiences. Survey respondents stated that enhanced dining options (farm-to-table, scenic locations, etc.) and unique cultural experiences are very appealing motivators for visiting Great Falls.
- Recommendations from friends and special offers are prime motivators for a Great Falls visit, therefore social media and influencers are critical to success.
- Traditional media such as newspaper, radio, and billboards were least influential.



Typical Party Composition

Respondents to the visitor survey provided details of what a typical travel party to Great Falls looks like.

- The data herein reflects leisure travelers that according to the lodging managers, make up the majority of overnight visits.
- Primary trip purposes: Getaways with family & friends, visiting friends & relatives, outdoor adventure, festivals/events, museums, concerts, etc.

How many people were in your immediate travel party?

N = 1492

- Average travel party size 3.8 people
- Travel party of 2 - 27.4%
- Travel party of 4 - 18.8%

Who was in your immediate travel party when you traveled to Great Falls, MT?

- Traveled with spouse/significant other - 29.0%
- Friends/family – adults only - 27.1%
- Friends/family – with children - 23.9%

What Mode of Transportation did you use to travel to Great Falls, MT?

- Car/truck/van/SUV - 78.5%
- Combination fly/drive - 11.4%
- RV/Camper - 8.1%



How many times have you visited Great Falls, MT?

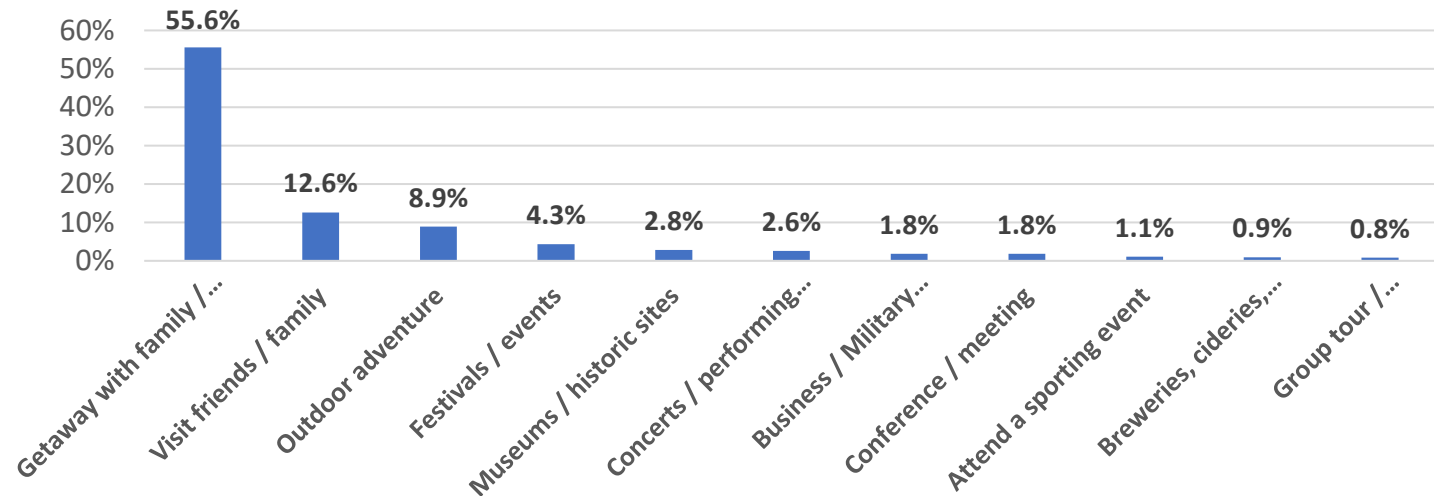
n=1499

- 66.4% first time visitors
- 33.6% repeat visitors (see next question responses)
 - 21.5% have been there once before
 - 12.1% have been there many times

Repeat visitors, how many times annually do you typically visit Great Falls? n=177

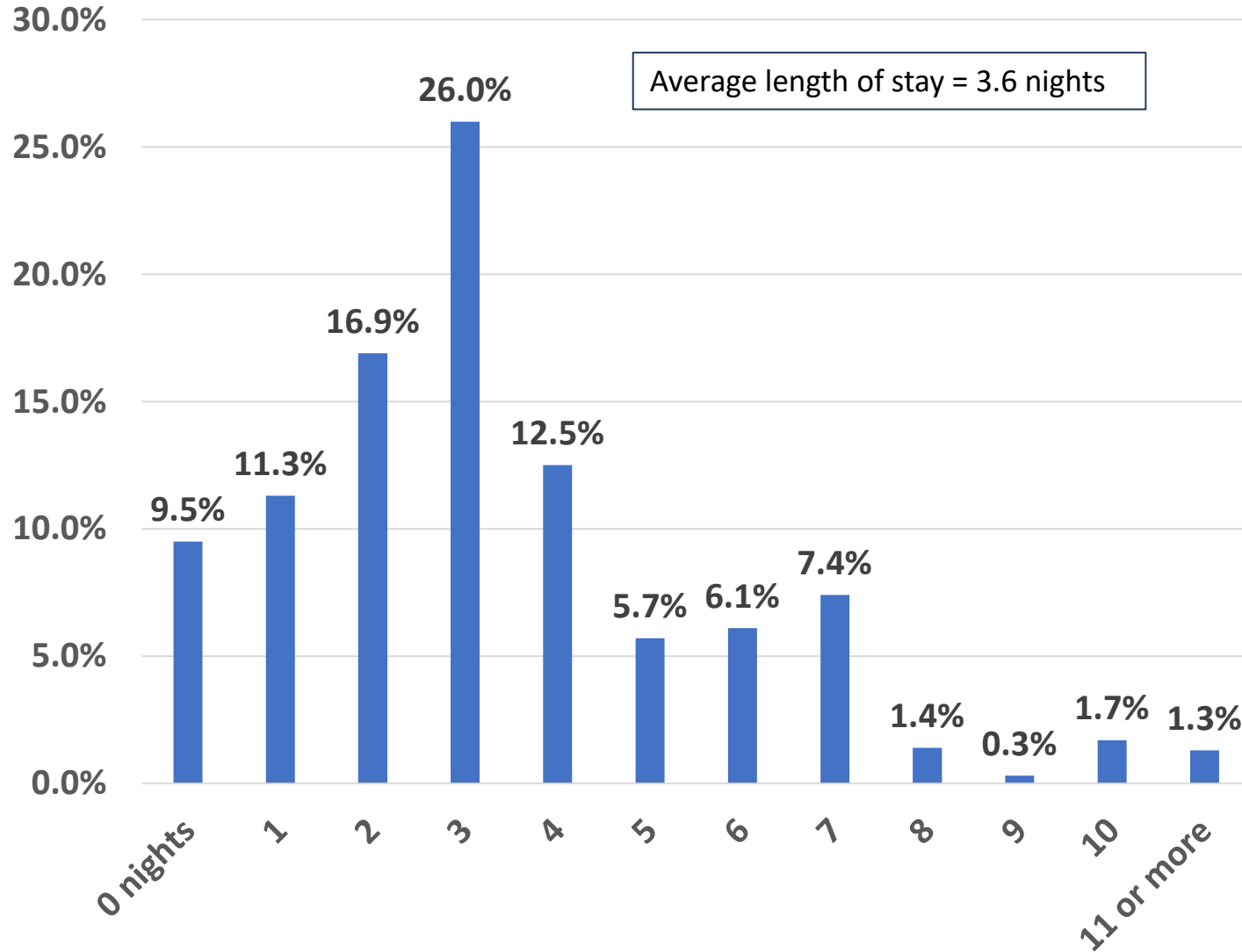
- Spring 1.4 times
- Summer 1.6 times
- Fall 1.2 times
- Winter 0.8 times

What was the MAIN purpose for your most recent trip to Great Falls? n=1499





How many nights did you stay in Great Falls on your most recent visit? n=1499



Where do you typically stay when visiting Great Falls? n=1488

- full-service hotel/resort/spa - 27.6%
- hotel/motel (no restaurant) - 25.5%
- campground / RV park - 12.3%
- rent a home/condo - 8.2%

Observations:

- The overall length of stay is impressive and reflects that there are plenty of activities to hold visitor’s attention while they are in Great Falls. The data also hints that Great Falls is a hub where people stay while doing activities in the central Montana region.
- Those who indicated “0 nights” were day-trippers.
- Traditional hotels are most popular for visitors to Great Falls with only a small percent desiring short term rental lodging.



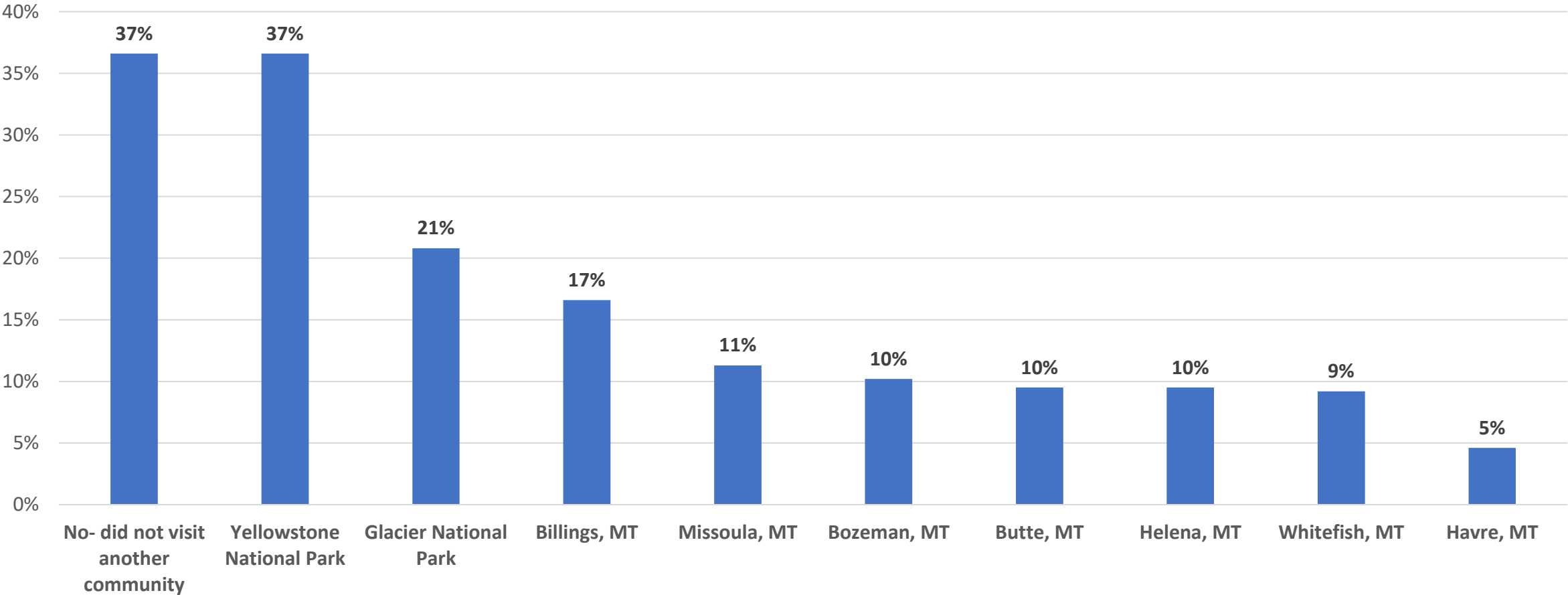
Spending Category	Visitor Respondents n= 1,541	Per Day	Per Person
Lodging (% of reporting)	\$564.55 (62.2%)	\$156.82	
Food / meals / winery / brewery (% of reporting)	\$358.67 (88.1%)	\$99.63	
Attractions / museums / activities (non-gaming) (% of reporting)	\$205.82 (80.0%)	\$57.17	
Casino / gaming (% of reporting)	\$177.67 (72.8%)	\$49.35	
Events / festivals (% of reporting)	\$133.53 (72.8%)	\$37.10	
Shopping (% of reporting)	\$403.10 (82.2%)	\$111.97	
Local transportation (fuel purchased in Great Falls, Uber, etc.) (% of reporting)	\$162.56 (34.8%)	\$45.16	
Average Total Spending Per Travel Party (% of reporting)	\$1, 495.63 (99.5%)	\$415.45	\$124.66
Average # of Persons in Travel Party	3.8 people		
Average Length of Stay	3.6 nights		

Observations:

- Average daily spending per travel party is reported by survey respondents as \$415.
- STR reports the ADR (2023 YTD) is \$124 which compares well with the reported \$156 from visitor surveys. Survey respondents typically stay in mid and upper range hotels and the responses also include the total amount they paid including taxes.
- The vast majority of overnight visitors stay in hotel/motel accommodations. Therefore, the higher lodging expenditures paid by those staying in short-term rentals (houses) have been removed from the data set.



While visiting Great Falls, did you leave and go to another community for other activities or events? n=1482

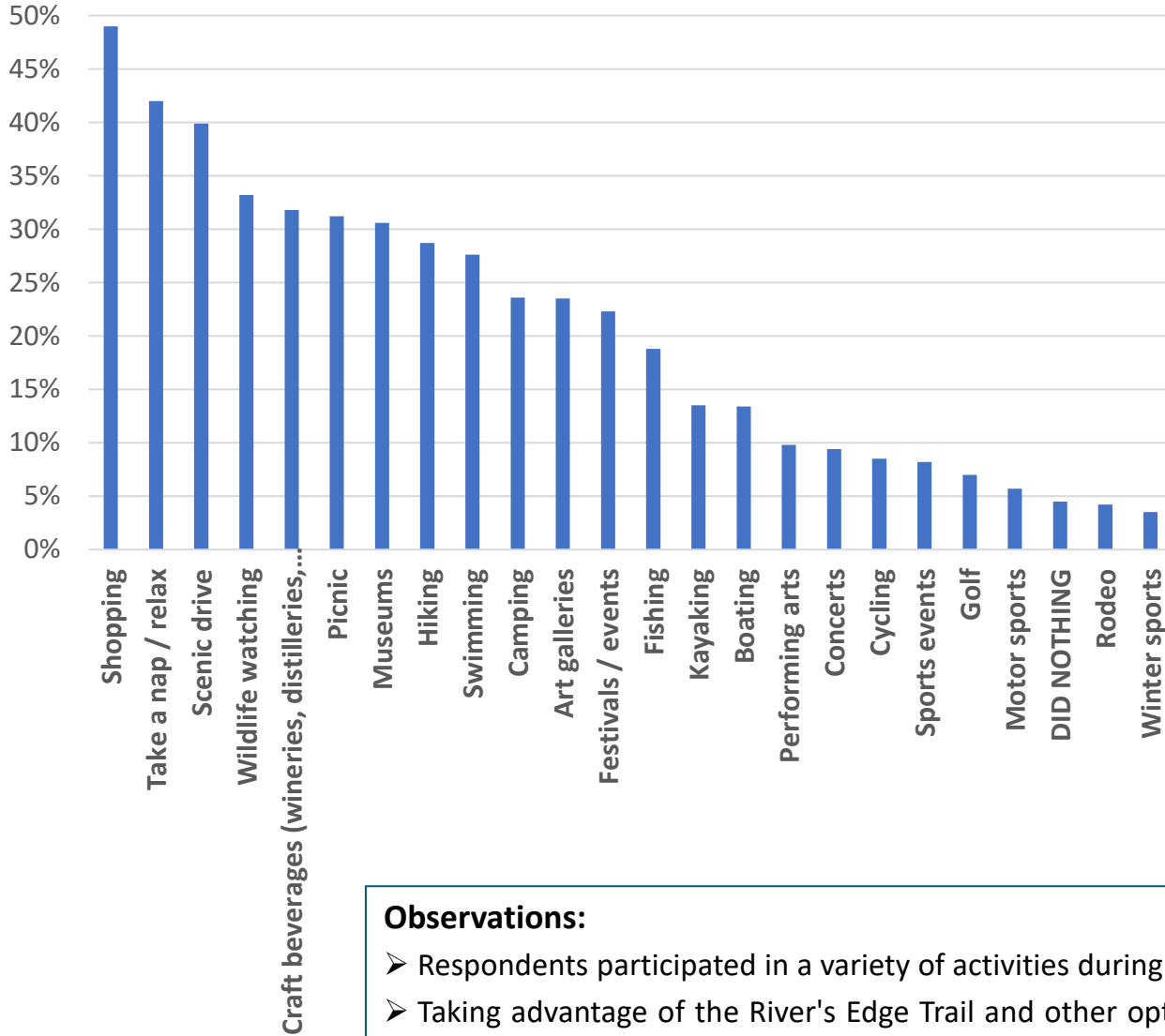


Observations:

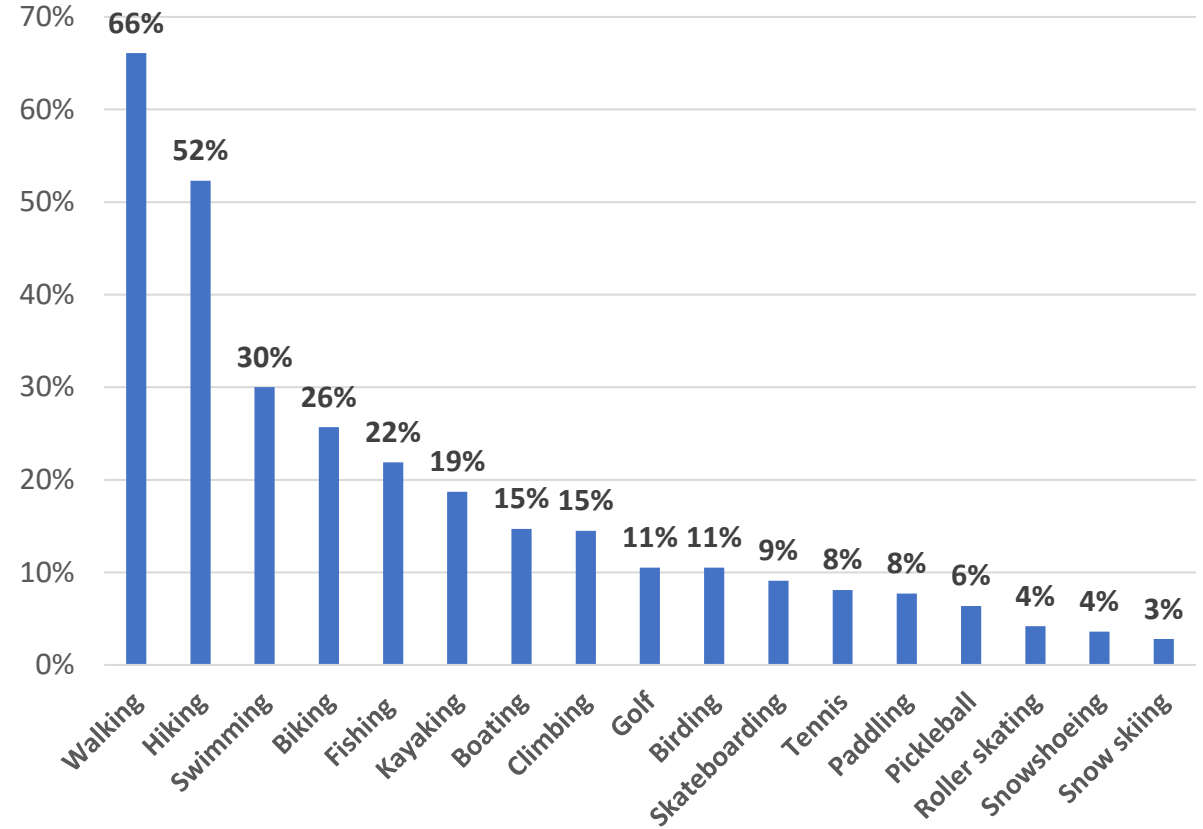
- Unsurprisingly, many Great Falls visits include national parks such as Yellowstone National Park (37%) and Glacier National Park (21%).
- Great Falls' strength as a destination is demonstrated by the 37% of respondents who visited just Great Falls, without including another community on their trips.
- Other top MT destinations visited include Billings (17%), Missoula (11%), Butte (10%), Bozeman (10%), and Helena (10%)



Check ALL activities that you or a member of your travel party participated in **WHILE VISITING** Great Falls. n=1420



Following is a list of **OUTDOOR EXPERIENCES** in or near Great Falls. Please check ALL that you or a member of your travel party visited while in Great Falls. n=1349



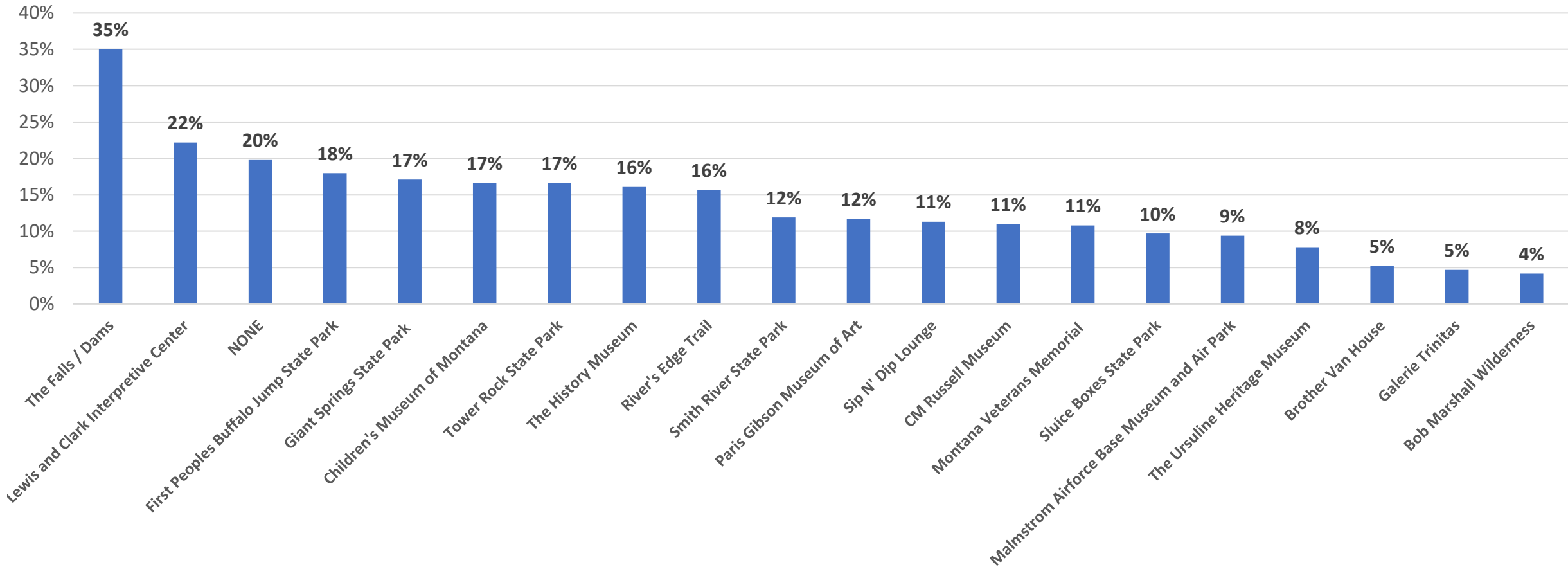
Observations:

- Respondents participated in a variety of activities during their visits to Great Falls with outdoor activities being most popular after shopping!
- Taking advantage of the River's Edge Trail and other options, more than half reported walking or hiking during their visit. Similarly, one-quarter reported biking.
- About 20% reported water activities such as fishing, kayaking, and boating.



Following is a list of major attractions in or near Great Falls. Please check ALL that you or a member of your travel party visited while in Great Falls.

n=1413

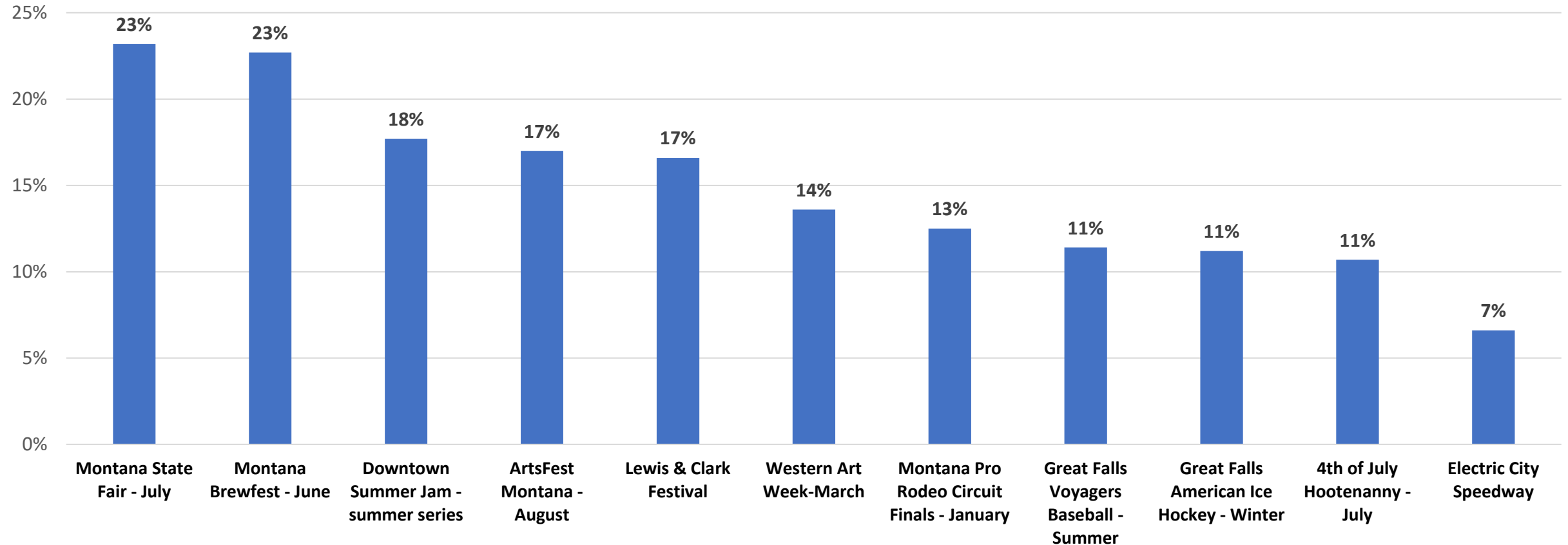


Observations:

- The Falls / Dams top the list of attractions with 35% of respondents visiting them.
- Other attractions along the Missouri River were popular such as the Lewis and Clark Interpretive Center (22%), Giant Springs State Park (17%), and River's Edge Trail (16%).
- Cultural offerings were also popular with the First Peoples Buffalo Jump State Park (18%), Children's Museum of MT (17%), and the History Museum (16%) near the top of the list.



Following is a list of festivals and events in or near Great Falls.
 Please check ALL that you or a member of your travel party visited while in Great Falls.
 n=1163

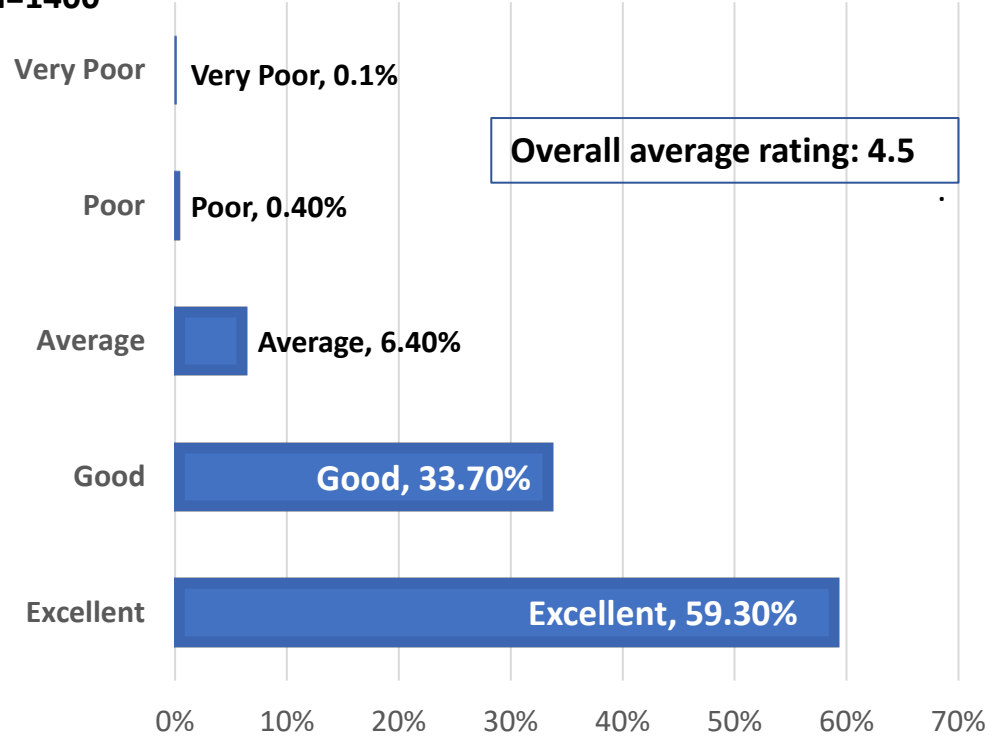


Observations:

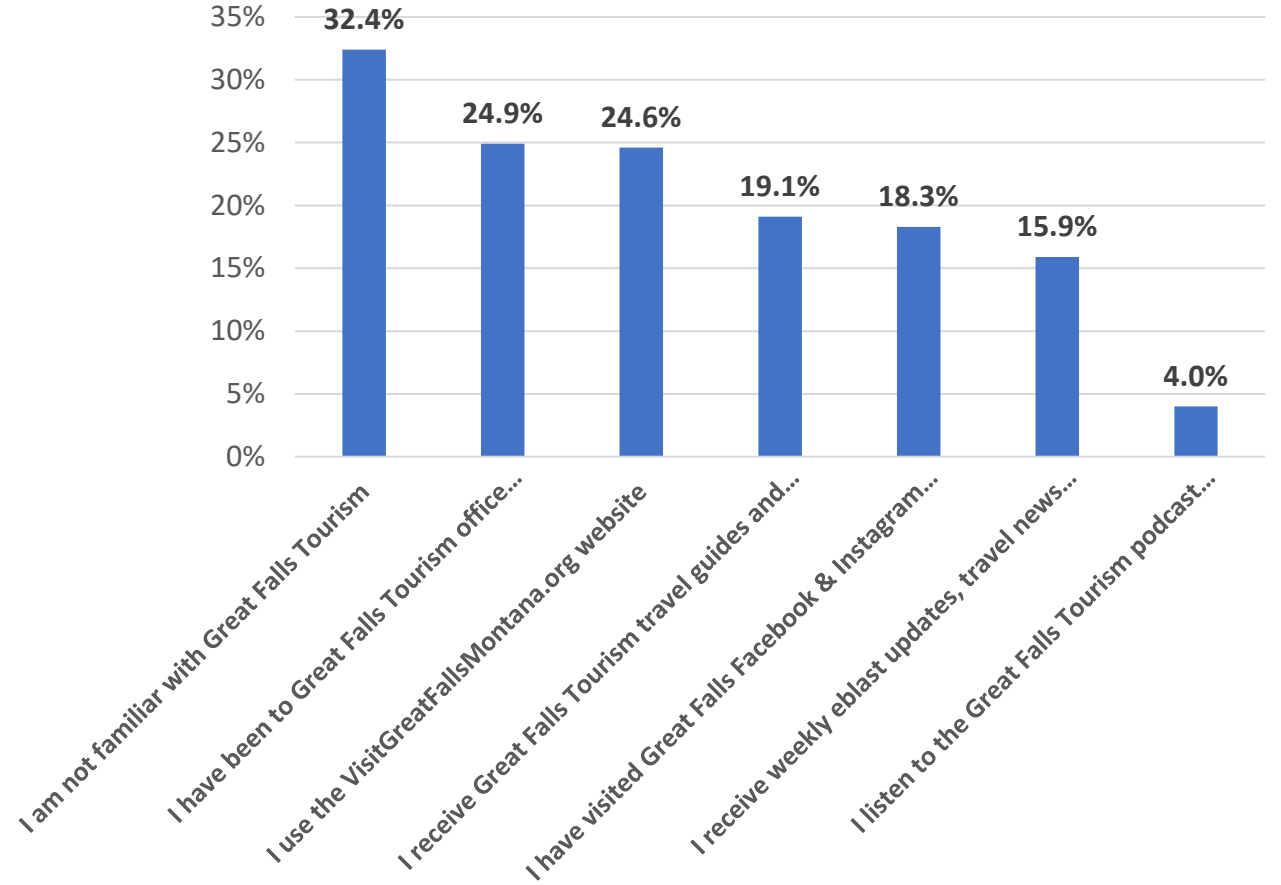
- The Montana State Fair and the Montana Brewfest were both attended by 23% of respondents.
- Other top summer events like the Downtown Summer Jam, Artsfest Montana, and Lewis & Clark Festival were all attended by more than 15%.
- Western Art Week was attended by 14% of respondents.



Overall, how would you rate your experience visiting Great Falls? n=1400



Do you utilize the services of Great Falls Tourism? n=1400



Observations:

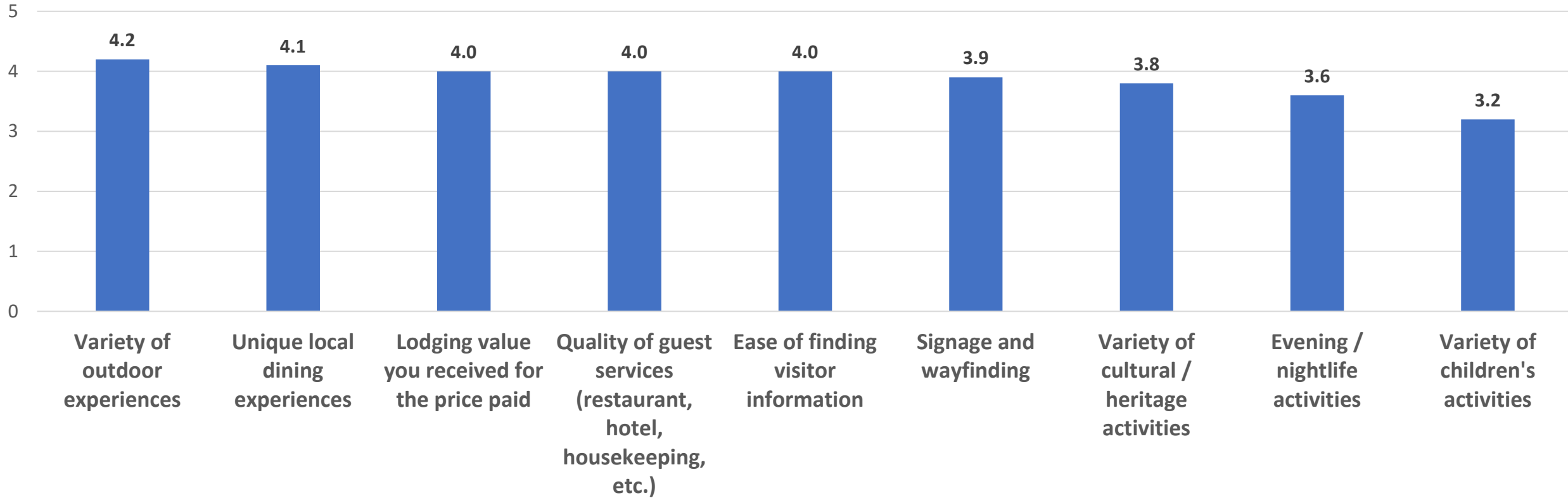
- Visitors overwhelmingly enjoyed their Great Falls experience with 93% rating it as good or excellent
- Most visitors used some form of contact with Great Falls Tourism for information and planning.



Following is a list of amenities offered in Great Falls.

Considering your most recent visit, please rate each amenity using the satisfaction scale provided.

n=1396



Observations:

- Ratings above 4.0 are desired because travelers tend to rate their travel experiences highly.
- Visitors expressed high satisfaction with most of the amenities of Great Falls.
- Outdoor experiences topped the list.
- Falling below 4.0 are: signage/wayfinding, variety of cultural/heritage activities, evening/nightlife & variety of children’s activities.
- Cultural/heritage activities & children’s activities should not be rated low and therefore indicate an opportunity to better inform travelers what activities are available, when they are open/available and how to locate them.



Please review the images below and select that image that most inspires you to visit Great Falls during the WINTER months.
n=1255



50.3%



31.7%



18.0%

Observations:

- The image of Great Falls as an active outdoor city with great cultural offerings is supported strongly when testing winter and summer advertising images.
- Survey respondents (50%) rated a skiing image as the most inspiring image for a winter visit to the Great Falls area.
- Cultural offerings, like Western Art Week, were also inspiring as 32% found the art gallery image as being most inspirational.
- The ice fishing photo was least desirable of the three options.



Please review the images below and select that image that most inspires you to visit Great Falls during the SUMMER months. n=1266



47.9%



35.1%



17.1%

Observations:

- For a summer visit, almost half of respondents chose the mountain hiking image as most inspirational.
- Drawing on the appeal and history of the Missouri River, 35% chose a river boating scene as most inspirational.
- The festival photo ranked third with 17% support.

LAST NIGHT in GREAT FALLS –Impact from Overnight Stays



31 LODGING PROPERTIES with
2,292 HOTEL ROOMS
61.2% ANNUAL OCCUPANCY (STR)



1,403
rooms occupied



Average daily rate = **\$116.87** (STR)



\$163,969
Average lodging revenue per night



Average travel party size = **3.6 PEOPLE**
(YSI/RS visitor survey)



Average overnight visitor count in
hotels in Great Falls per night = **5,051**



Average spending per person,
per visit = **\$115**
(YSI/RS visitor survey)



\$580,865
Average daily expenditures

VISITOR SPENDING ESTIMATE PER NIGHT IN GREAT FALLS =

\$580,865

ANNUAL OVERNIGHT VISITOR SPENDING ESTIMATE IN GREAT FALLS =

\$212,015,725





Meeting and Sports Planner Research



Purpose

To conduct a meeting planner survey for Visit Great Falls to identify decision making patterns between definite meeting planners, prospect meeting planners and lost meeting planners.

Methodology

A comprehensive online survey instrument was prepared by the Young Strategies research team to capture comparative data between those that are definite meeting planners, prospect meeting planners, or lost meeting planners for Visit Great Falls. Email recipients were invited to take a survey and once completed were able to download a \$5 gift card to either Starbucks, Amazon, or Target. Recipients were also entered into a chance to win a grand prize \$200 VISA gift card.

The survey was deployed to 281 meeting/event planners in a database provided by Visit Great Falls. 72 meeting/event planners responded to the survey 26%.

A broad range of survey responses were received from definite, prospect, and lost meeting planners and is deemed to be predictive of overall meeting planner patterns for Visit Great Falls. Survey response data was compared to prior similar meeting/event planner research conducted for Visit Great Falls.

Summary of Findings

Among respondents currently booking in great falls:

- Most Great Falls meetings are in the Education (47%), Corporate (21%), and Arts/Culture (18%) sectors.
- Great Falls meetings are relatively small with 58% having under 100 attendees.
 - Under 50 attendees 33%
 - 51-100 attendees 25%
 - 101-200 17%
 - 201-500 14%
 - Over 501 11%
- Board meetings account for 56% of the reported meetings.
- Respondents report use all types of properties in Great Falls – full-service hotels, limited service, concert venues, event facilities, museums, etc.
 - 69% of meeting planners currently booking in Great Falls are extremely or very likely to book in GF again.
- Top competitors for Great Falls are Billings, Missoula, and Bozeman.
- The majority of the Great Falls meetings business is from MT.
- Some respondents desired another large convention hotel option.



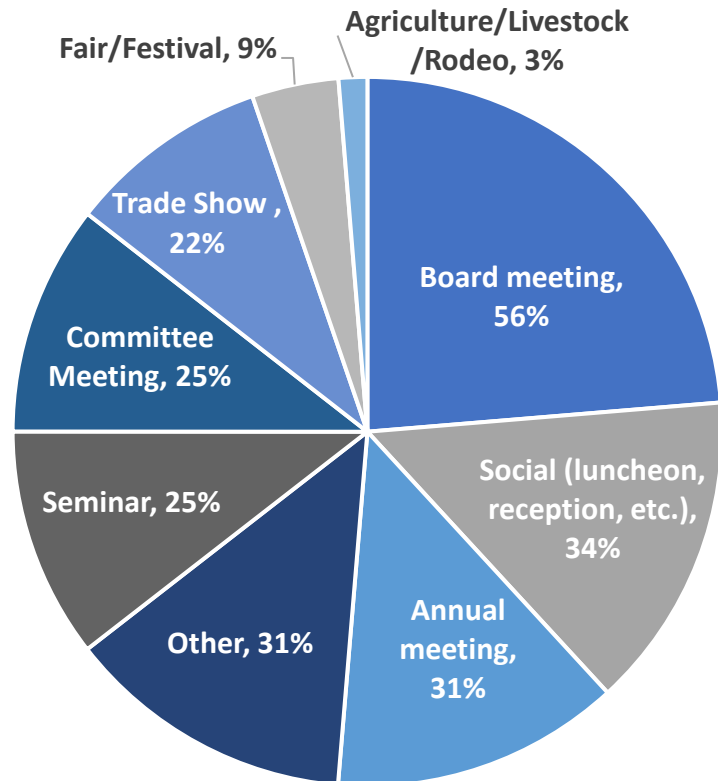


Planner Respondent Profile

72 meeting planners responded to the Meeting Planner Survey
Of those 72, 34 reported having held a meeting in Great Falls.

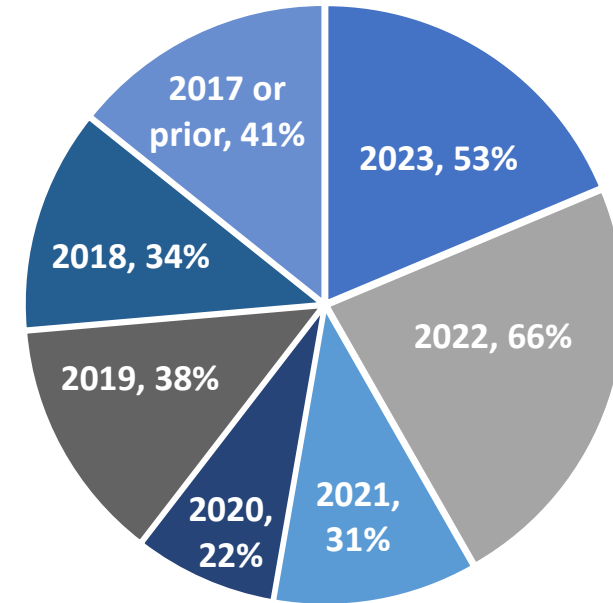
- Majority (43.8%) of meeting/event planners surveyed reported they have the potential to host meetings in Great Falls annually.
- Almost two-thirds (64.5%) of meeting planners reported planning spousal or family options for attendees
- 63% of meeting planner attendees report rotating meeting destinations in a multi-state region, 49% report a rotation of meeting destinations within Montana
- Exactly half (50%) of meeting planner respondents reported contracting with only 1 lodging property to house attendees.

What type of meetings/events have you held in Great Falls? n=32



Over half of meeting planners responded that they held a board meeting in Great Falls.

In which year(s) did you hold meetings in Great Falls? n=32



Meeting planners that did not hold meetings in Great Falls over the last 5 years reported “dated and small meeting venues” and “group not wanting to travel to Great Falls during the time of year the meeting was held” as reasons why they did not choose Great Falls for their meeting/event.



Please estimate the number of participants who attended meetings/events in Great Falls.

n=32

Lowest number of participants:

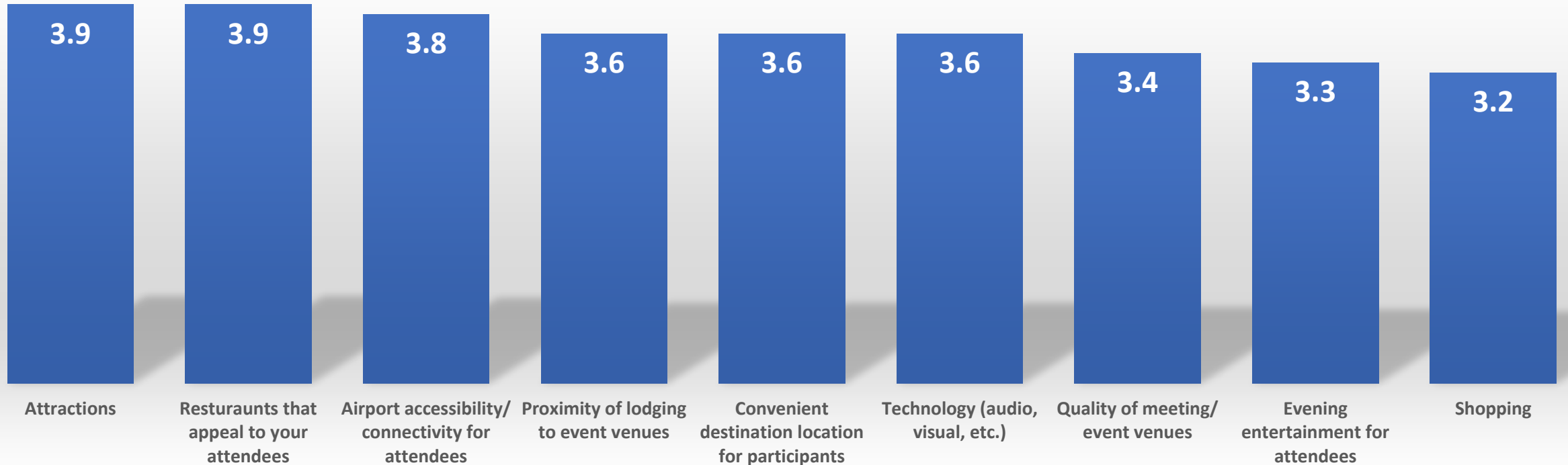
- **Average 215 participants**
- Min 6 participants
- Max 3,000 participants

Highest:

- **Average 673 participants**
- Min 25 participants
- Max 10,000 participants

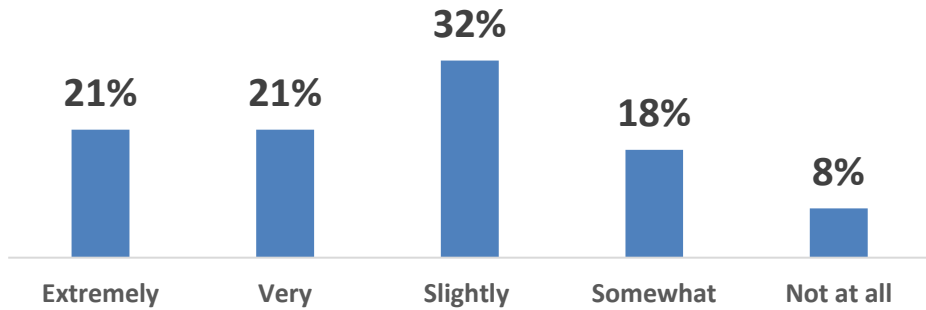
Please rate your perception of Great Falls, MT on the scale provided below. n= 70

Scale; 1 = Very Poor, 2 = Poor, 3 = Average, 4= Good, 5=Excellent





Please tell us how likely you are to plan a future meeting or event in Great Falls. n=62



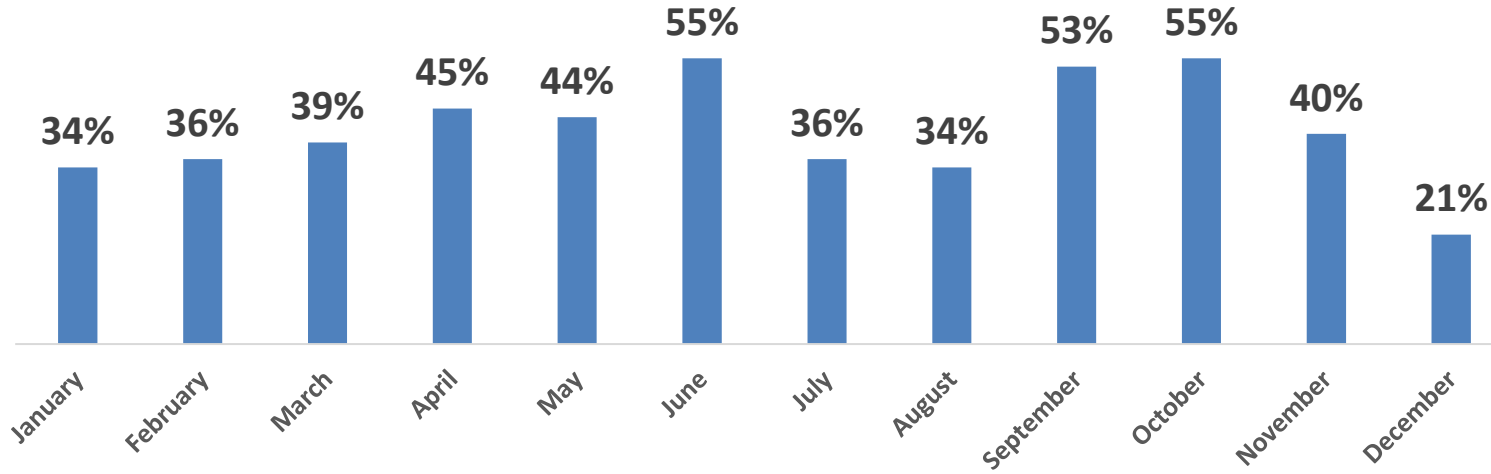
If unlikely, please tell us why:

- It's up to the group where their meeting is held
- Not sure of destination yet
- Airlift convenience
- The committees pick where meetings go
- Know nothing of the area to be able to consider
- It's a niche market
- My clients have asked for Glacier area, Billings, and Missoula. They haven't mentioned Great Falls and I am unfamiliar with the location.
- Our event required sponsorship to help with prizes. Very few people and businesses wanted to help in any way
- Not in our region for the regional meeting
- You do not have a full-service hotel that is modern with enough meeting space to house our event
- Too difficult to get to and from most population centers
- Poor experience at the Holiday Inn
- Secondary market that requires more flights for many attendees
- Most attendees from Midwest/East

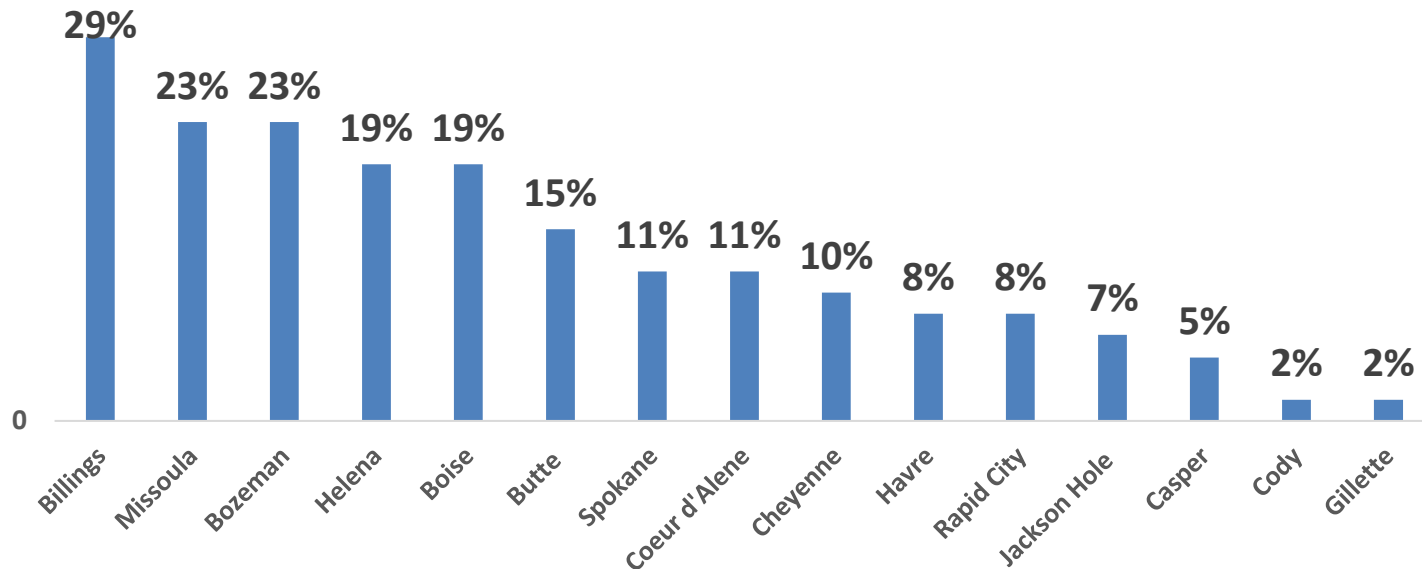
Almost half of meeting planner respondents (42%) reported they are EXTREMELY or VERY likely to plan a future meeting/event in Great Falls.



Which months of the year do you typically plan your meetings/events? n=62



In which cities do you currently plan meetings/events?

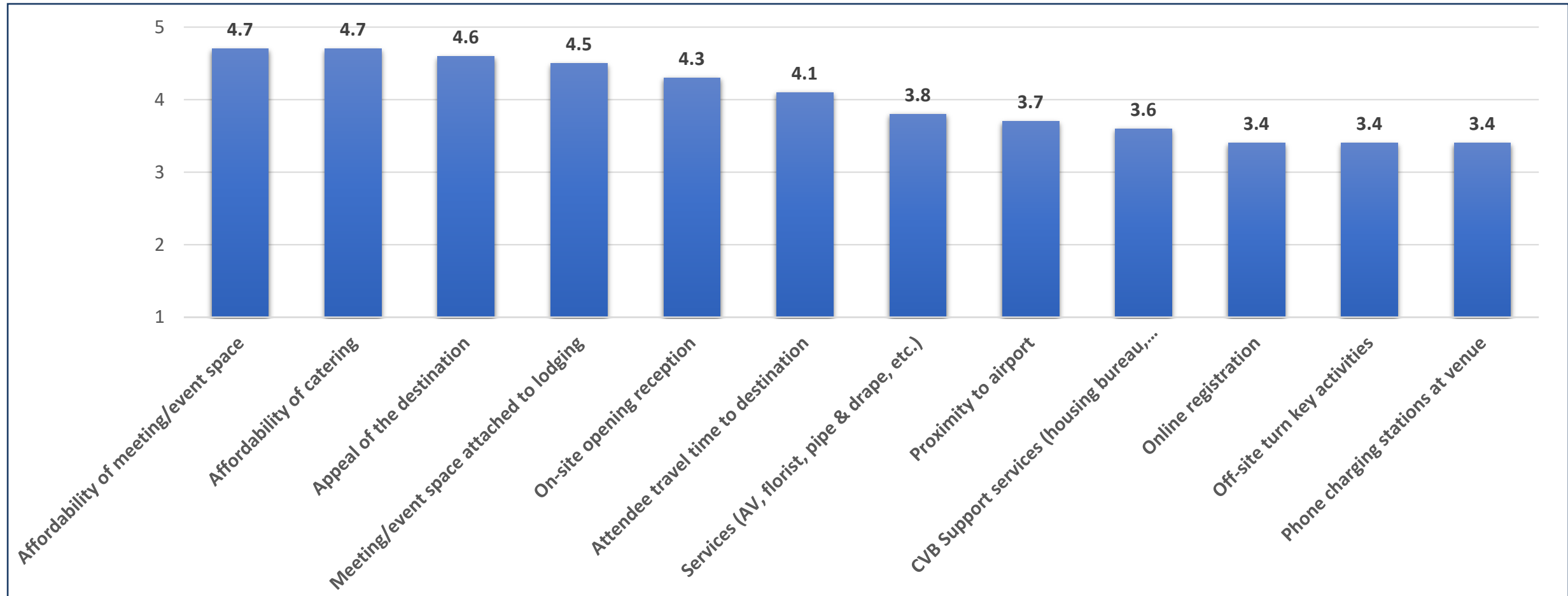


Other:

- New Orleans
- Louisville (2)
- USA Airport hub cities and around the world
- Augusta
- East of Mississippi
- Big Sky (2)
- Whitefish (2)
- California
- Arizona
- Oregon
- Washington D.C.
- IA
- Seattle (2)
- Atlanta
- Johannesburg
- Cape Town
- Denver
- Tucson (2)
- Winston-Salem
- Florida
- Texas
- Wisconsin
- Park City
- Kalispell (2)
- Portland (2)
- San Diego (2)
- Minneapolis
- Vancouver
- Caribbean
- Fort Lauderdale
- San Antonio
- Las Vegas
- Nashville
- St. Louis
- Indianapolis
- Chicago suburbs
- Alexander



When choosing a meeting space or event location, rate the importance of the following categories. n=61

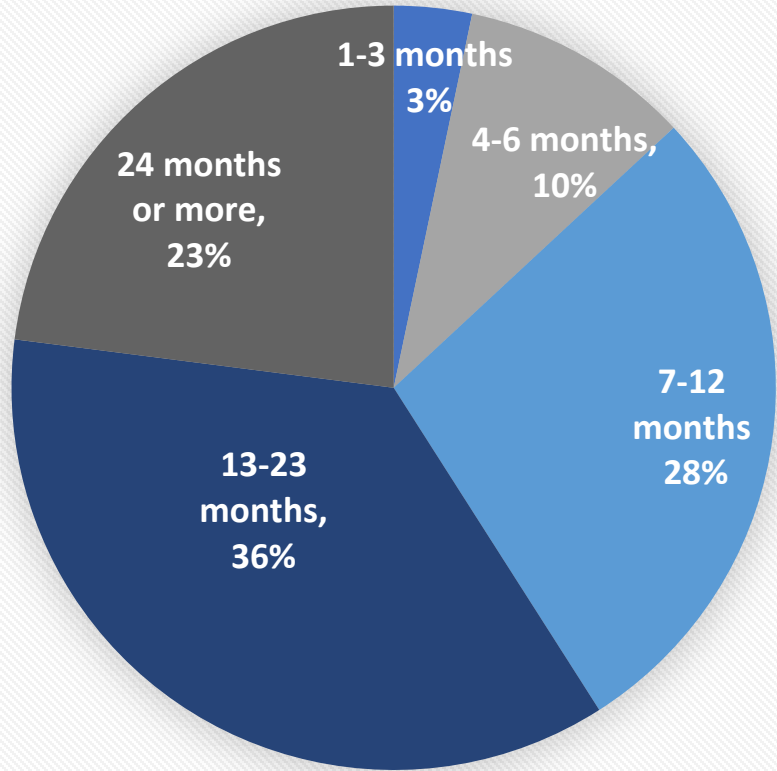


Other:

- Creativity of F&B
- Welcoming to BIPOC and LGBTQ+ attendees / safer space / sustainability
- Ability to incorporate our clause/concessions
- Safety (2)
- Walkability
- Hotel and food quality
- Service staff, especially conference services
- Close to a store or mall in walking distance



How far in advance do you select a site for your largest meeting/event? n=61



Over half (59%) of meeting planner respondents reported selecting a site for their largest meeting/event at least 13 months in advance.





Sports Planner Survey Response

Methodology

An online survey was developed by the consulting team and deployed to 34 sports event planners in the Visit Great Falls contact database. As found in the lodging section of this report, the survey of lodging managers revealed that team sports drives 6.5% of the annual room demand in Great Falls with most of those room nights booked in the airport district hotels.

Summary

- Eleven sports event planners responded representing a 32% response rate. While the response rate is high, the sample size is not adequate to be predictive of a wide audience of sports events planners. However, the responses indicate high satisfaction and desire to return to Great Falls.
- Sports events planned by respondents include a mix of indoor/outdoor and winter/summer sports. Most common: basketball, running, golf, soccer, volleyball.
- 80% of respondents are extremely or very likely to plan a future sports event in Great Falls.
- Sport planners' rating of the Quality of Great Falls Sports Venues: Excellent (0%); Good (36%); Average (27%); Poor (27%); Very Poor (9%)
- Positive Great Falls characteristics: Convenient destination location; Airport and lodging proximity to sports event sites.
- Characteristics rated average or below: Shopping; Attractions; Restaurants; Other activities for participants (including evening), .
- March – May is the peak planning months for future sports events.
- Top sports competitor cities are Havre (44%) and Helena (33%).
- The most important characteristics for picking a city include the appeal of the destination, sufficient parking, overall cost, attendee travel time, event space affordability, and event viewing experience.
- Respondents report that an average of 86% of their participants are from MT.

Observations:

- Team sports delivers approximately 6.5% of the annual room nights consumed in Great Falls. The survey responses indicate a high satisfaction with Great Falls as a sports destination.
- The low ratings for shopping, attractions, restaurants and other activities indicates an opportunity to provide better information services to sports event attendees so they can find all of the above activities.
- Survey response indicates an opportunity to expand sports marketing for growth



VISIT
Great Falls
MONTANA

Resident Survey

Methodology

An online survey instrument was developed and prepared for distribution by the YS/RS research team and approved by VGF. The survey was deployed to a random sample of residents through web-links provided to VGF and their industry partners. The data on this page reveals the demographic profile of the Great Falls area resident survey respondents.



Summary of Resident Survey Responses

How many years in Great Falls: less than 1 year-15%, 1-5 years-23%, 6-10years-21%,morew than 10 years-41%.

What brought you to Great Falls-Born here-29%, MAFB-11%, work-24%, family-15%

Top Places you take guests when visiting Great Falls: Giant Springs SP, Lewis & Clark IC, CM Russell, Rivers Edge Trail, Hiking, Gibson park, Museums, Downtown, Newberry, Swimming, Dams, etc.

Words to describe Great Falls: Friendly, great, beautiful, river, fun, family, affordable

Top rated statements describing Great Falls: A place to live & work, a place to raise a family, a day hiking destination, an active outdoors destination, a place to retire.

How many times a year do you participate in outdoors activities: 1-5 times-34%, 6-10 times-16%, 11 or more- 46%.

Desired improvements to Great Falls to be more appealing as a destination: more/better shopping, more/better dining, fewer casinos, more family-oriented activities, more adult evening entertainment, more outdoor activities.

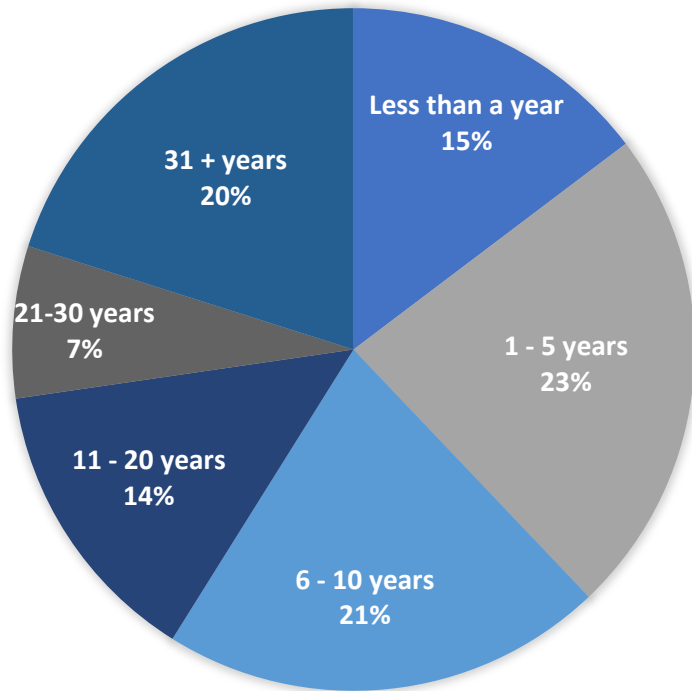


What words would you use to describe Great Falls as a destination to a friend or relative? n=231 Residents





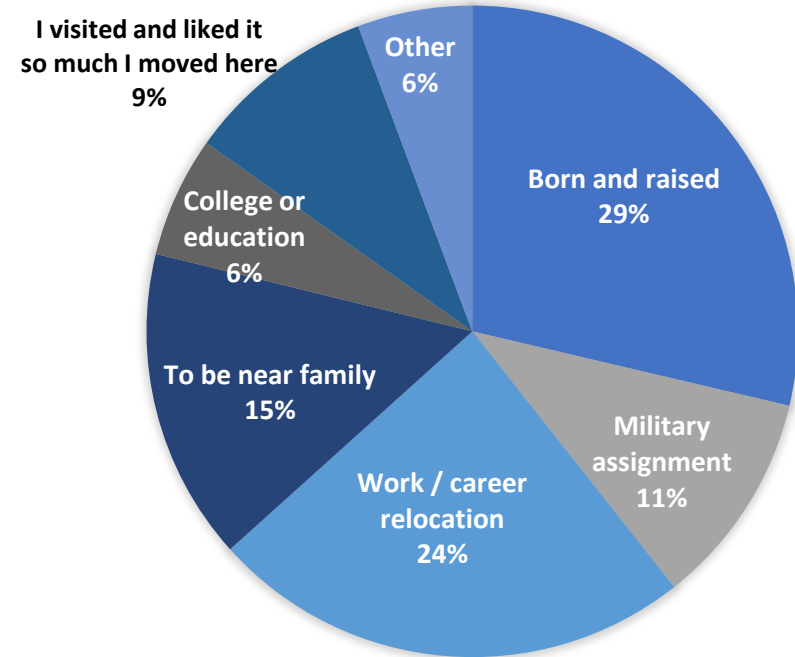
Please tell us how many years you have lived in Great Falls, MT. n=319



Observations:

- Respondents represent a cross-section of Great Falls residents in terms of how long they've lived in the city.
- While 38% have lived in the city less than 5 years, 41% have done so for more than 11 years.
- Top reasons for living in Great Falls include being Native born (29%) and Work / Career Relocation (24). 9% moved to Great Falls after enjoying a visit to the community.

What brought you to Great Falls, MT? n=317



Other:

- Born here... left for ten years and came back
- Combo: visited here and fell in love with it, so we got our military assignment here
- Had nothing better to do
- I grew up there
- MT School for the Deaf and Blind
- Married
- Met my significant other who lives here
- Moved here at age 5
- My father wanted a career change and moved to Great Falls
- New start
- Retirement
- Wife is from here so we moved back
- Marriage
- Move here not by choice
- Parents divorced



Please list the top five places or activities that you take your guests to see/do while in Great Falls, MT. n= 302

Giant Springs State Park	58	Camping	4	Local Restaurants	2
Lewis And Clark Interpretive Center	27	Downtown Shopping	4	Mall	2
C.M. Russell Museum	26	Missouri River	4	Montana State Fair	2
Rivers Edge Trail	26	Restaurants	4	Movies	2
Hiking	18	River	4	Out To Eat	2
Gibson Park	17	The Falls	4	Picnics	2
Museums	15	Trails	4	Rafting	2
Downtown	12	Walking	4	Rivers	2
Newberry	12	Black Eagle Dam	3	Roadhouse Diner	2
Swimming	11	Boating	3	Sightseeing	2
Dams	10	Borries	3	The Dams	2
Ryan Dam	10	Breweries	3	The Peak	2
Sluice Box State Park	10	Downtown Shopping	3	4th Of July Concert	
Farmer's Market	8	Fishing	3	Adam And Eve	
Sip N' Dip Lounge	8	Gates Of The Mountains	3	All Of The Parks	
Children's Museum	7	Golfing	3	Amusement Parks	
Falls	7	Lake	3	Applebees	
First Peoples Buffalo Jump	6	North 40 Outfitters	3	Art Auctions And Shows	
Mighty Mo Brewery	6	Rocky Mountain Front	3	Athletic Parks	
Mountains	6	Shopping	3	Atlanta	
Showdown	6	Water Park	3	Banff	
Biking	5	Dante's Restaurant	3	Beautiful	
Dining	5	3d Restaurant	2	Benton Lake Wildlife Refuge	
Interpretive Center	5	Bozeman	2	Bicycle Riding	
Memorial Falls	5	Electric City Speedway	2	Bike Riding	
Paris Gibson Square Museum Of Art	5	Electric City Water Park	2	Bike Trails	
Park	5	Hjg	2	Bird Watching	
Toronto	5	Ice Skating	2	Bob Marshall And Glacier	
Waterfalls	5	Kayaking	2	Bowling	
Bar	4	Little Belt Mountains	2	Brewpub	



Please list the top five places or activities that you take your guests to see/do while in Great Falls, MT. (continued)

- | | | | |
|--|--|---|-------------------------------------|
| Brush Crazy | Downtown Nightlife | Great Falls Americans Hockey | Montana Club |
| Buffalo Hunt | Drinking | Great Falls Ice Plex | Movie Theater |
| Campus Of Up/Trinitas Gallery | Driving | Great Falls Site | Mt Montana |
| Candy Masterpiece | Duck Pond | Gym | Nature |
| Cash | Dunking Drive Thru | Happiness | Neighbors |
| Casinos | Eat Out Local | Helena Montana | Nevada |
| Centene Stadium | Eating | Hemples | Nice Dinner |
| Chick Fil A | Electric City | Highwoods | North & South Shore Trail |
| Chiles | Enbar | Hike In The Rocky Mountains | Oaks |
| Church | Escape The Falls | Hikes | Other Cities With Better Activities |
| Church Member | Expo Park | Holter Lake | Our Lake |
| City Waterpark | Fair | Hops Dining | Out On The Town |
| Classical Concerts | Family | Hotels | Outdoor Activities |
| Club Cigar | Fantastic | Howards | Outdoor Eating Options |
| Clubbing | Fifth And Wine | Hunting | Outdoor Recreation. |
| Coffee | Fire Artisan Pizza | Hunting Trail | Pokémon Hunting |
| Coin | First People State Park | Kellergeist | Public Golf Course's |
| Concert | Fishing Missouri - Holter - Belt - High Wood Creek | Local Coffee Shops | Raft On The Missouri |
| Concerts At The Newberry | Flag Hill (Golfing) | Local Parks | Recreational |
| Cooking | Float River | Local Shopping | Relaxing |
| Cool | Float The Mighty Mo Or Smith River | Local Sports | Resorts |
| Crispy Chick | Florida | Locally Owned Restaurants | River At Carter Ferry |
| Day Drinking | Fund Raising Events | Lunch | Rodeos |
| Day Trip To Grand Union In Fort Benton | Gf Public Library | Memorial Island | Saibeens Kitchen |
| Day Trips In The Area | Gibson Museum | Missouri River - Dearborn | School Sports |
| Devils Glen | Glacier Park | Missouri River (Recreation Rd) | Scooters |
| Dog Park | Glory Holes | Missouri River (Usually Kayaking Or Paddleboarding) | Seasonal Downtown Events |
| Downtown Bars | Golf | Missouri River Float | Shop Local |
| Downtown Eating | Great Falls | Missouri River/ Boating | Skatepark |



Please list the top five places or activities that you take your guests to see/do while in Great Falls, MT. *(continued)*

- Sport Center
- Sporting Events
- Sports
- St. Anns Cathedral
- State Fair
- State Park
- Stevin Avenue
- Stock Car Races
- Sunset At Buffalo Jump
- Surrounding Area Outdoors
- The Block Bar And Grill
- The Fair
- The Farmer's Market
- The History Museum
- The Little Belts
- The Mountain
- The Plaza
- The River
- The River/Dams
- The Schools
- The Trees
- Theatre
- Touring Damns
- Tourist Spots
- Trails System
- Trout Farm
- Vinegar Jones Cabin
- Visit The Parks
- Voyager Games
- Wadsworth Park
- Walking Trails
- Warden Park
- Waterfalls/Dams
- West Bank Park
- Western Art Week (Less Lately)
- Winery
- Winter Game
- Zoo



Please rate Great Falls on each of the following statements: n=186

	Rating
a place to live and work	4.2
a place to raise a family	4.2
a day hiking / trail destination	4.1
an active outdoors destination	4.1
a place to retire	4
a bicycle friendly destination	3.9
a meeting / conference destination	3.8
an active water recreation destination	3.8
a weekend getaway destination	3.7
a place with dining & nightlife	3.6
a sports/events destination	3.6

When hosting friends, family, or business guests in your home, please rate your level of satisfaction with the following experiences in Great Falls: n=185

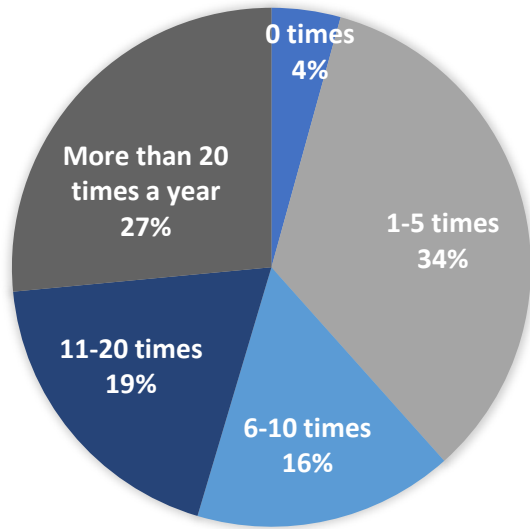
	Rating
Museums and heritage activities	4.0
Hiking trails	4.0
Bicycle trails	4.0
Unique local dining	3.8
Local events / festivals	3.8
Other recreational outdoor activities (kayaking, paddling, boating, etc)	3.8
Health and wellness	3.6
Breweries / Distilleries / Wineries	3.6
Cultural activities (performing arts)	3.6
Unique shopping	3.4
Evening entertainment	3.3
Children's activities	3.3
Chain affiliated retail shopping	3.0

Observations:

- When showcasing Great Falls to visitors, residents express the most satisfaction with the community's hiking, biking, and outdoor recreation activities.
- Great Falls' museums also rank very high, along with local festivals.
- Shopping, evening entertainment, and children's activities rank lowest.



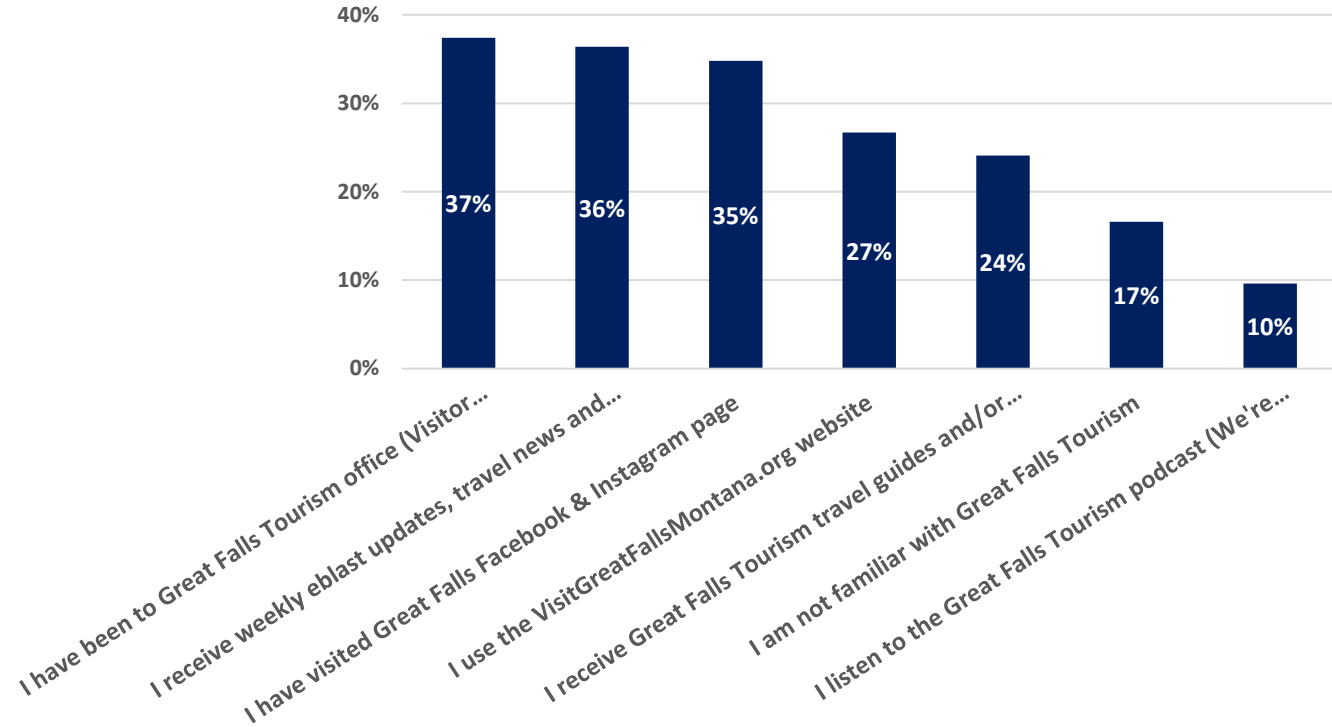
Approximately how many times annually do you participate in some type of outdoor recreation activity in Great Falls? (hiking, biking, boating, kayaking, camping, hunting, fishing, etc.) n=185



Observations:

- As would be expected in Great Falls, residents enjoy the outdoors.
- Roughly half of residents report enjoying some form of outdoor recreation more than 10 times per year. The top quarter recreate outdoors more than 20 times per year.
- Only 4% report no outdoor recreational activities at all.

Do you utilize the services of Great Falls Tourism? n=187



Observations:

- Great Falls Tourism is quite well known among responding residents.
- A majority of residents use at least one service of Great Falls Tourism. Only 16% report not being familiar with the organization.
- Top services used by residents include visiting the Visitor Information Center (37%), weekly eblast updates (36%), and the Great Falls Tourism Facebook and Instagram pages (35%).



What would make Great Falls more appealing as a destination for your friends and family? n=171

- **Better and more shopping quality shopping (32)**
- **Better dining / restaurants (13)**
- **Better dining variety / healthy (9)**
- **Fewer Casinos (8)**
- **Family oriented activities or establishments (kid friendly) (7)**
- **More adult evening entertainment opportunities (7)**
- **I don't know (6)**
- **I like everything about it / it's great (6)**
- **It is a great place to live (5)**
- **Great place for outdoor and nature enthusiast, Such as hiking mountain, biking, running, and kayaking. (4)**
- **Lower air fares (3)**
- **Better flight options / air service (2)**
- It's nice and quiet (2)
- More modernized (2)
- Downtown is going through a rebirth, would love to see it all revitalized and no more empty buildings. Less transient presence around downtown.
- More vibrant downtown - fewer vacant buildings
- Continue to expand housing, shopping, retail options downtown! Better convention facilities!
- More downtown restaurants and hotels with conference center/pool walking distance from downtown
- The indigent population downtown has gotten so bad, I actually expect someone to bother me when I eat outside.
- Better downtown parking, more live entertainment
- Downtown has come a long ways but Holiday Village has deteriorated badly.
- They are getting there with some fun places downtown, not just casinos. Bars or Restaurants with fun things to do in the evenings.
- A waterfall
- Activities to do, especially in winter. Outdoor ice skating, cross country skiing, and in the summer, kayaking, paddling. We have beautiful ponds like Gibson, and we need ice skating outdoors which would lead to curling, and other fun things
- Amusement, zoological park, botanical gardens, better shopping options, less stench from the refinery,
- An open minded and American culture that doesn't bend to political parties and tells true American history
- Along with other activity options, such as laser tag/go karting/top rope rock climbing..
- More things to do on a regular calendar. There's not much you can count on to plan in advance. Maybe the Russell auction, but that's about it. We're already planning summer 2024 with friends and I can't think of a single thing I want them to come to town for.
- More dining options, downtown shopping options open past 5 or 6 pm, maybe items posted on Great Falls Tourism could be shared with local residents so they would know about activities/events in the city (monthly newsletter, app, etc.)
- More franchise restaurants (Olive Garden, chic-fil-a) and shopping options to go with the locally owned establishments.
- Better rest stops
- Many good eating establishments share space with casinos, not always family friendly More kid friendly activities
- The tourism office sucks and signage still sends you to the old one at outlook. It's also hard to find out about events happening in this city!



What would make Great Falls more appealing as a destination for your friends and family? *(continued)*

- A detox and treatment center would be wonderful for low income individuals to clean up the very noticeable drug problem in town which in turn might lower crime rates
- Bike lanes, improve downtown (crime, access, dining), more public access to Missouri river and surrounding area
- Clean up 10th ave so. It is riddled with broken signs, 70s billboards, dead trees and landscaping. There are very few business owners who actually take pride in their city enough to keep their businesses from looking like junk yards. It is one of the ugliest streets in Montana. Everyone who comes to town drives down this street and it leaves a lasting impression of great falls.
- For being a river city there are no boat rides or places to rent them so there's no water activity that's easily accessible.
- Forgot to include Hunting & Fishing as to why family/ friends visit Perhaps Special Events like a Running Marathon, Fishing Derby Name Recognition Entertainment
- Get rid of the refinery, it stinks
- Good accommodation
- Huge parties
- I think maybe building more trees to make the environment more sustainable and lively.
- I would want to find somewhere with a good hiking ground
- If it had more black people
- If the people were more friendly
- If we got bigger and better casinos
- It's too expensive sometimes, lowering the prices would be nice.
- Keeping up the events they always plan visits around concerts or events like Western Art Week
- LANDSCAPING! We have way too many ugly medians that should be landscaped with boulders, grasses, bushes, etc. And the bridges, especially on 10th, are UGLY. Our bridges should be works of art that people talk about. I'll bet when they replace the rusty, bent up rails on the bridge by the Country Club, they'll go the cheapest route possible rather than doing a functional, art installation. (Sheridan WY has a super impressive bridge as you enter from the north. Check it out.)
- Continue to grow the entertainment coming to town at the Newberry and Beacon. Activities such as Top Golf or other engaging activity business. Upgraded fairgrounds facilities, holding more bigger events, an example is the Alerus Center in Grand Forks. An amphitheater on the old Anaconda Refinery site. Less homelessness, safe drivers, safer areas at night,
- Live events, fun run/triathlon Love to see a Costco perhaps a Caio Mambos Italian restaurant and less casino's and businesses catered to that sort of life. Perhaps a large clearing of outdated buildings and sub standard housing that visitors see on busy streets and make us a laughing stock amongst other cities and make us less desirable.
- Maybe adding a resort.
- More Summer Music Festivals Bike trails downtown (Summer) - love the scooters
- More breweries.
- More crossdresser bars. More destinations for children
- Adventure theme park More waterslides more snow activities.
- More outdoor concerts
- More party places and activities to do.
- More people
- Another brewery or two would build upon the attraction to GTF.
- Live entertainment such as plays or Broadway shows. Our music scene has improved. Comedy or Dinner shows would be awesome
- More houses, not apartments.
- More sports venues
- More strippers would be honestly better
- More summer activities



What would make Great Falls more appealing as a destination for your friends and family? *(continued)*

- Property owners/renters would take care of their property, especially keeping the trees trimmed and removing dead/dying trees and watering their grass or converting it to xeriscaping so it doesn't look as if they don't give a rats ass about it, fix the broken windows, and slap some paint on the outside.
- Raising the child care tax credit.
- Safer walking/bicycling between destinations like downtown or river's edge trail to the rest of the city. More businesses open in the evening, more variety, especially ethnic food, in the downtown. More businesses that run events and stay open later, food services shutting down at or before 9pm can be challenging with traveling guests.
- Tell the locals to stop treating visitors and residents who move from out of state as enemies. Ban the obnoxious "no vacancy" stickers. Visitors = \$ for local businesses yet half the people who come here to visit never come back because the locals treat them so poorly. Increase the number of chain restaurants in town. Bring in better shopping options.
- The experience and scenery
- The view
- The walking
- Year around inside and outside recreation center. Inside dog park. Family play place(for adults and children), decrease or end homelessness and begging.
- There is plenty to keep you and your family busy during your stay.
- I would love to see all the great areas they have for hiking.
- The Missouri river provides Great Falls with its name



Brand Image and Awareness Research

Methodology

An online survey instrument was developed and prepared for distribution by the YS/RS research team and approved by VGF. The survey was deployed during the two days of strategic planning workshops held in Great Falls November 6 – 8, 2023 to a curated target demographic sample of likely future visitors. The data in this report section reveals the images and messaging that is most likely to attract future visitors to Great Falls, MT. Survey response = 485 completed surveys.



Survey Response Summary n=485

Survey Respondent Demographics

Point-of-origin: United States – 88% & Canada Top states= MT-34%, WA-13%, CO-12%, AZ-9%, NV-9%, UT-9%, WY-9%, MN-5%.

How many Leisure getaways a year: 1-2=70%, 3-5=23%

Top states in terms of destination appeal: CO, MT, WY, UT, ID.

Types of destination that appeal most: Beach, lake/river, mountain, National ark, Active outdoors.

Desired activities: River, riverfront city, casino, hiking, family-friendly, all-inclusive, waterpark

Words to describe Montana: Mountains, beautiful, big, Yellowstone, glacier, outdoors, beauty.

Best known cities in Montana (open ended): None, Billings, Bozeman, Missoula, Helena, Butte, Kalispell, Great Falls (7th), Yellowstone, Whitefish, Glacier, Flathead Lake.

Familiarity with Great Falls: Heard of it, never been-45%, been there-37%, never heard of it-18%.

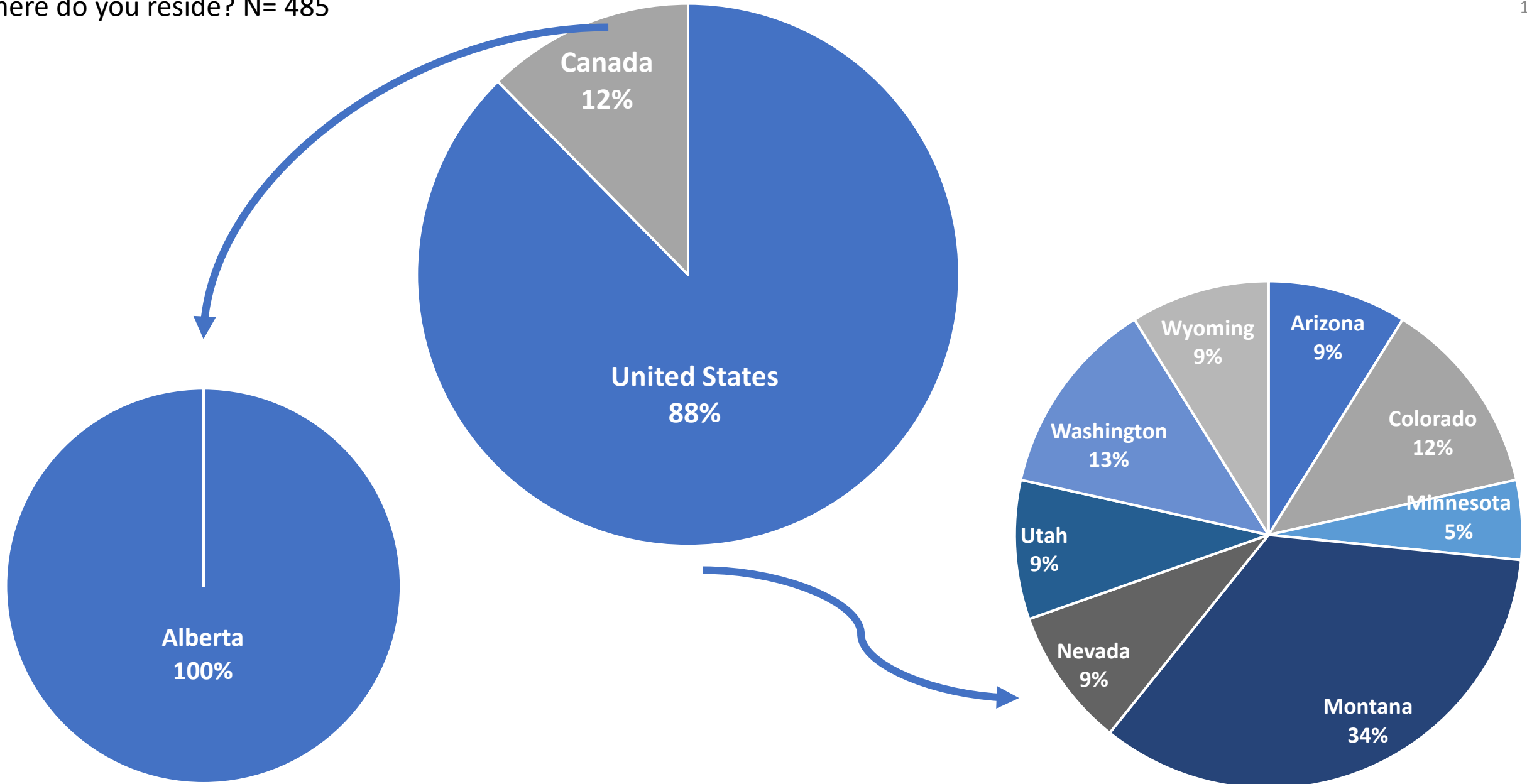
Words to describe Great Falls: water, waterfalls, river, mountains, beautiful, nature, city.

Which words or phrases inspire you to visit Great Falls: waterfalls, summer outdoor activities, outdoor activities, fairs/events/festivals, riverfront city, evening entertainment, eleven museums, Lewis and Clark



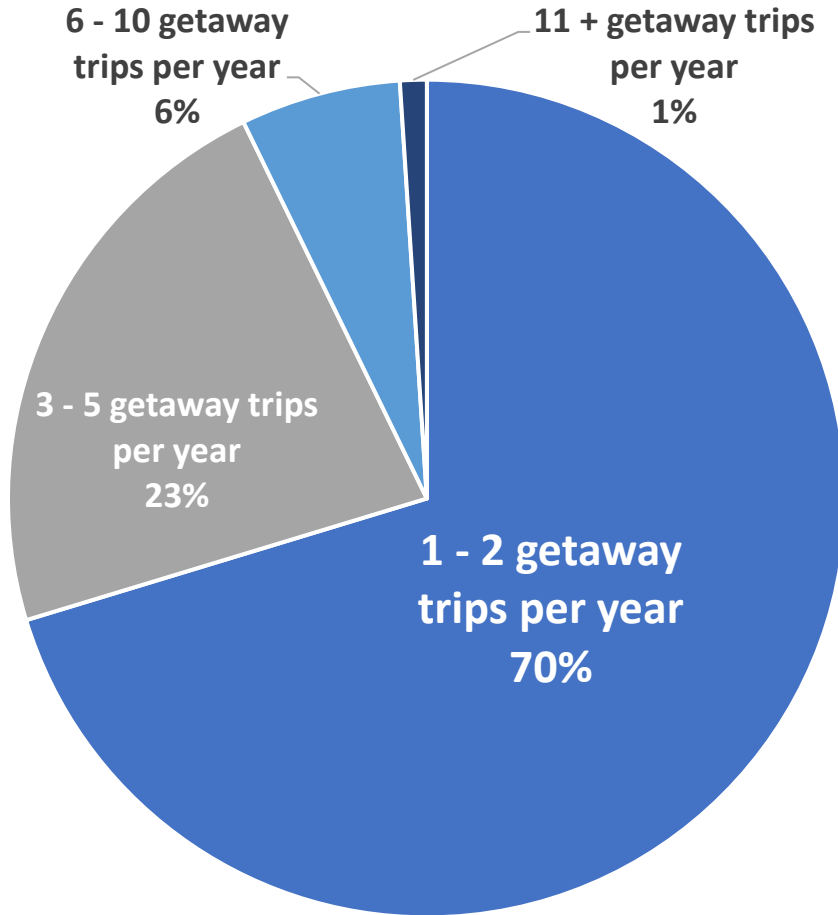


Where do you reside? N= 485





How many leisure getaways do you take each year? n=485

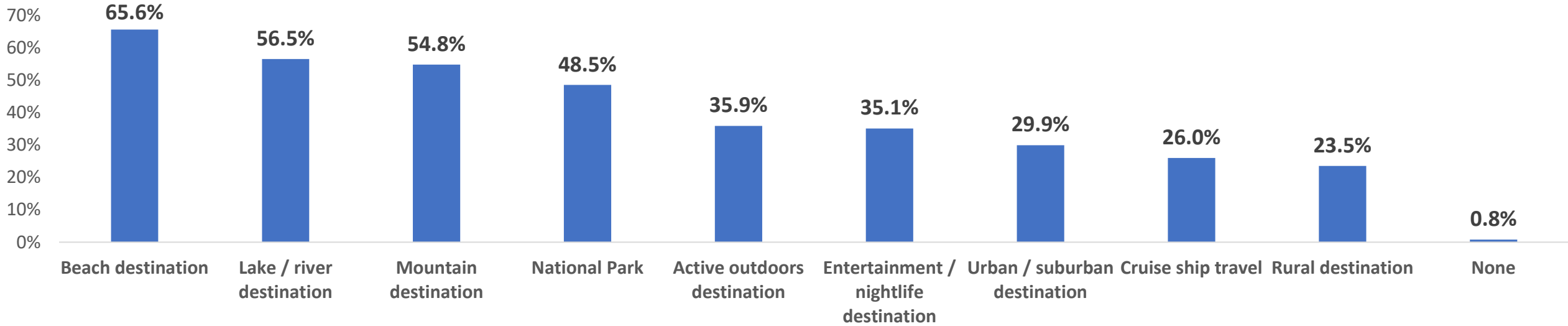


Please rank the following states in terms of their appeal to you as travel destinations? n=485

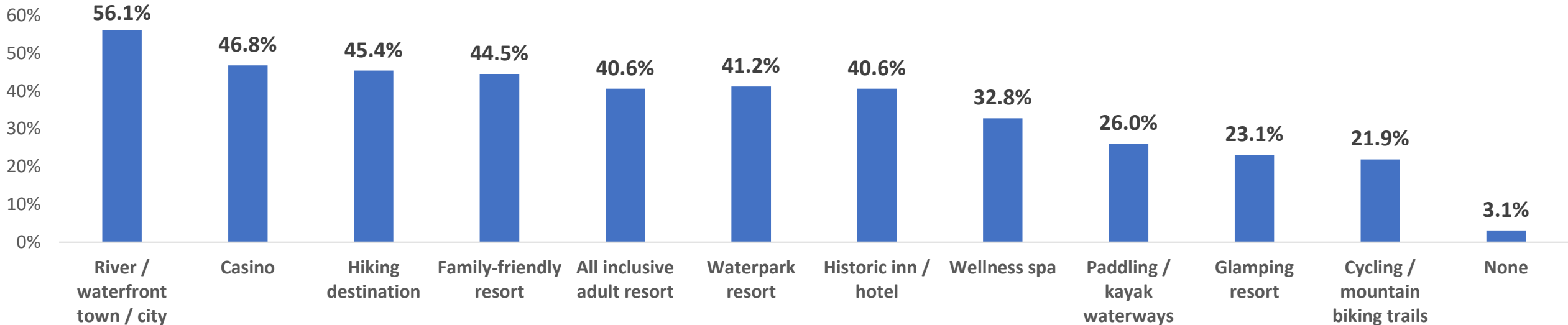
1. Colorado
2. Montana
3. Wyoming
4. Utah
5. Idaho



When looking for a vacation or getaway, which types of destinations are most appealing? n=485



When looking for a vacation or getaway, please check ALL that are of interest? n=485





Brand Image and Awareness Survey

When thinking of MONTANA, what cities/ areas come to mind? If none, please write N/A. n=485

N/A	211	Big Fork	2	Camping	1	Gator	1
Billings	135	Boulder	2	Canyon Ferry Lake	1	Ghost Towns	1
Bozeman	104	Flathead	2	Casper	1	Glacier International Park.	1
Missoula	89	Gardiner	2	Chester	1	Glendive	1
Helena	84	Hamilton	2	Clinton	1	Good	1
Butte	37	Hungry Horse Reservoir	2	Colorado	1	Good Fun	1
Kalispell	33	Lewistown	2	Commerce Falls	1	Grand Tetons	1
Great Falls	30	Miles City	2	Country	1	Grass	1
Yellowstone National Park	26	Montana	2	Crow	1	Green	1
Whitefish	21	New York	2	Crow Agency	1	Hair	1
Glacier National Park	17	Parks	2	Custer Gallatin NF	1	Hardin	1
Flathead Lake	10	United States	2	Cut Bank	1	Helmville	1
Glacier Park	8	West Glacier	2	Deer Lodge	1	Henderson	1
None	8	50,000 Dollar Bar	1	Denmark	1	Hot Springs	1
Red Lodge	7	Amtrak	1	Denver	1	Idaho	1
Glacier	6	Anaconda	1	Depeche Mode	1	It's Impressive Place	1
Polson	6	Arapahoe County	1	Detroit	1	Jordan	1
Big Sky	5	Beaches	1	Duluth	1	Kansas	1
Eureka	5	Beaumont	1	East Glacier	1	Kater	1
Livingston	5	Beauty	1	East Missoula	1	Kootenai Falls	1
Malta	4	Belt	1	Erie	1	Lewis And Clark	1
Mountains	4	Big Horn	1	Farming	1	Libby	1
Virginia City	4	Big Timber	1	First	1	Like	1
Columbia Falls	3	Bismarck	1	Florence	1	Miami	1
Dillon	3	Bitterroot	1	Forsyth	1	Midwest	1
Glasgow	3	Brackenridge	1	Fort Peck	1	Missouri River	1
Havre	3	Buffalo	1	Frasier	1	Montana City	1
Lakes	3	Burbank	1	Friendly	1	Mount Pilear	1
West Yellowstone	3	Busby	1	Gallatin County	1	Mountain Areas	1
Belgrade	2	California	1	Gallatin Valley	1	Mountainside	1

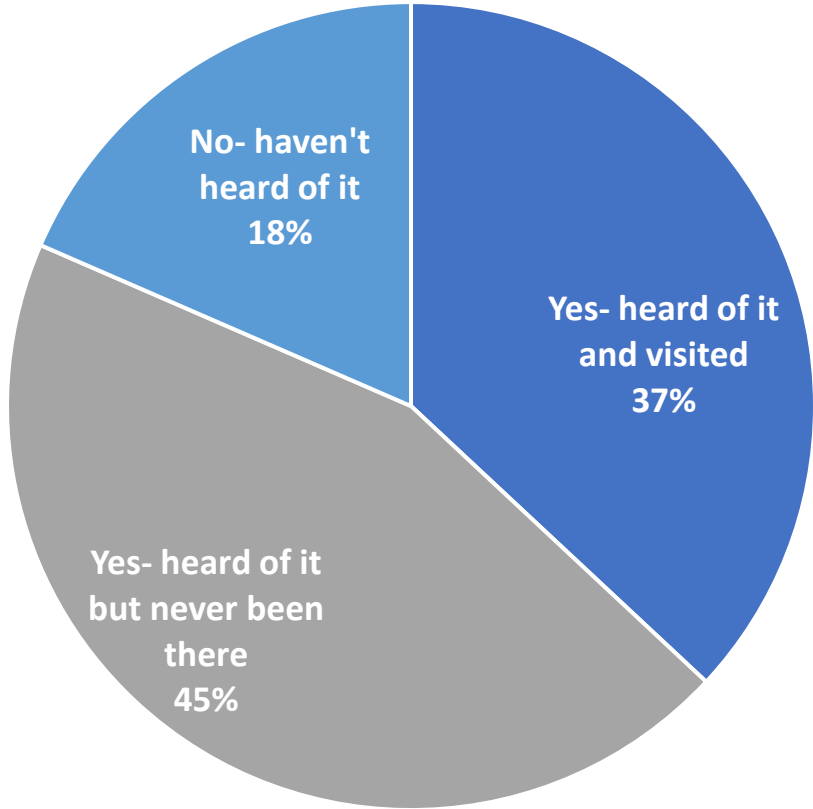


When thinking of MONTANA, what cities/ areas come to mind? If none, please write N/A. n=485 (continued)

My City	1	Trego	1
Northwest	1	Troy	1
Not Sure	1	View	1
Nothing	1	Volcano	1
Paradise Vllly	1	Walgreens	1
Pear Valley	1	Walmart	1
Pink	1	Washington	1
Plains	1	Wealthy	1
Quiet	1	Western US	1
Redneck	1	Wibaux	1
Rivers	1	Wolf Point	1
Rocky Mtns	1		
Saint Mary	1		
Scenic	1		
Scoby	1		
Seattle	1		
Simple	1		
Skiing	1		
South	1		
St Marys	1		
St Regis	1		
Stevensville	1		
Sydney	1		
Target	1		
The	1		
The Clubs	1		
The Park	1		
The Streets	1		
Thompson Fls	1		
Thomson Rvr	1		
Three Forks	1		

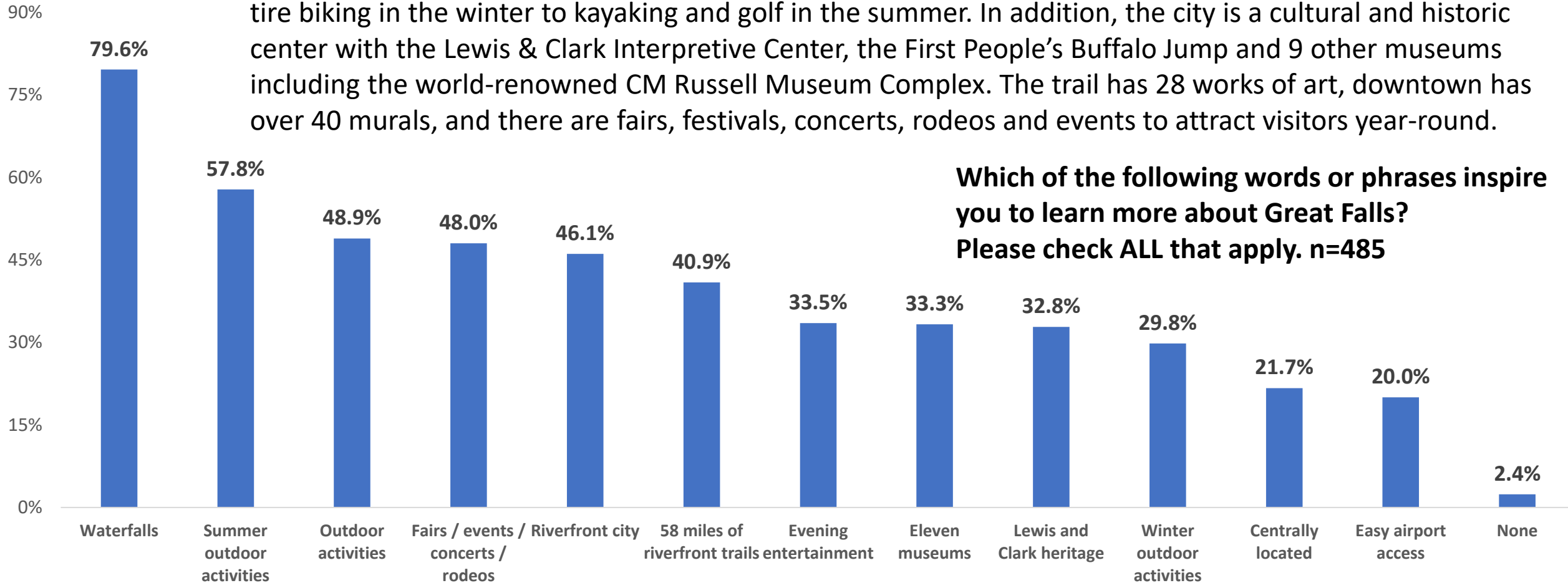


Are you familiar with Great Falls, MT? n=485





Great Falls, located in central Montana, is a picturesque city on the Missouri River located between Yellowstone and Glacier National Parks. The Missouri River passes directly through the city with 5 waterfalls that give the city its name. Ample shopping, dining and evening entertainment make this a fun destination for couples, friends, independent adventurers and families. Known as a year-round outdoor recreation city, Great Falls boasts 58 miles of hiking / biking trails along the river with boating, fishing opportunities and amazing diverse natural beauty. You can be active year-round from snow skiing and fat-tire biking in the winter to kayaking and golf in the summer. In addition, the city is a cultural and historic center with the Lewis & Clark Interpretive Center, the First People’s Buffalo Jump and 9 other museums including the world-renowned CM Russell Museum Complex. The trail has 28 works of art, downtown has over 40 murals, and there are fairs, festivals, concerts, rodeos and events to attract visitors year-round.





DestinationNEXT Leaders Research

Methodology

DestinationNEXT is a comprehensive stakeholder tool to help travel organizations strategically evaluate their destinations. The online diagnostic tool allows leaders to participate in an objective self-assessment of the destination and identify priorities and strategies for planning. The DestinationNEXT assessment tool is a comprehensive online survey based on 24 variables related to destination strength and community alignment. The twenty-four variables have been identified in the past three destination futures study conducted by NEXTFactor, Inc in partnership with Destinations International. The survey was distributed to a wide swath of community leaders with 91 leaders responding.

- Destination is in the Explorers quadrant with below average scores for alignment and below average scores for strength.
- Different stakeholder groups have different perceptions of Great Falls.
- There are several opportunities for improvement in Great Falls as per the lowest rated statements shown:

Opportunities for Improvement

Destination Strength

	Statement	Performance ▲
1.	Variety of public transportation options	2.38
2.	Limited issues with homelessness	2.52
3.	Diverse and high-quality shopping opportunities	2.54
4.	Safe from crime	2.55
5.	Known as a walkable destination	2.65

Destination Alignment

	Statement	Performance ▲
1.	Adequate affordable housing for workers	2.32
2.	Affordable childcare options for workers	2.43
3.	Adequate workforce for frontline hospitality jobs	2.45
4.	Adequate workforce for management jobs	2.55
5.	Adequate customer service training	2.60

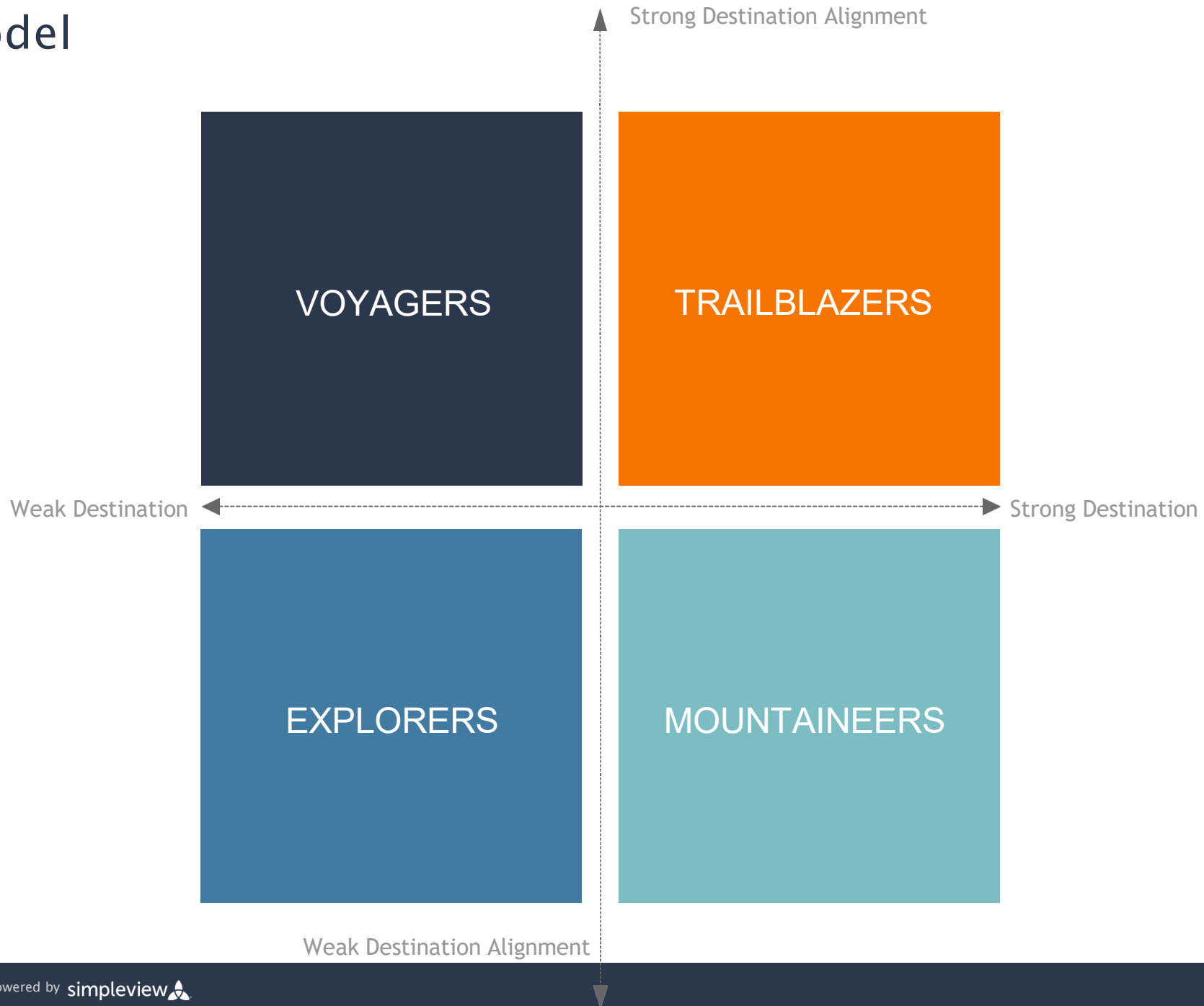
DESTINATION
NEXT

Multi-User Diagnostic Assessment
Great Falls

Nov 6, 2023

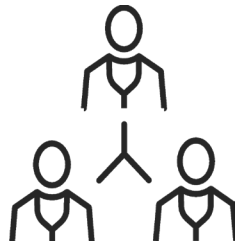


Scenario Model





Community Alignment Variables



Business Support



Community Group & Resident Support



Government Support



Organization Governance



Workforce Development



Hospitality Culture



Equity, Diversity & Inclusion



Funding Support & Certainty



Regional Cooperation



Sustainability & Resilience



Emergency Preparedness



Economic Development



Attractions & Experiences



Arts, Culture & Heritage



Dining, Shopping & Entertainment



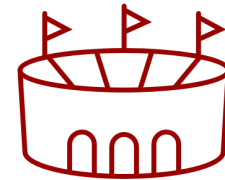
Outdoor Recreation



Conventions & Meetings



Events & Festivals



Sporting Events



Accommodation



Local Mobility & Access



Destination Access



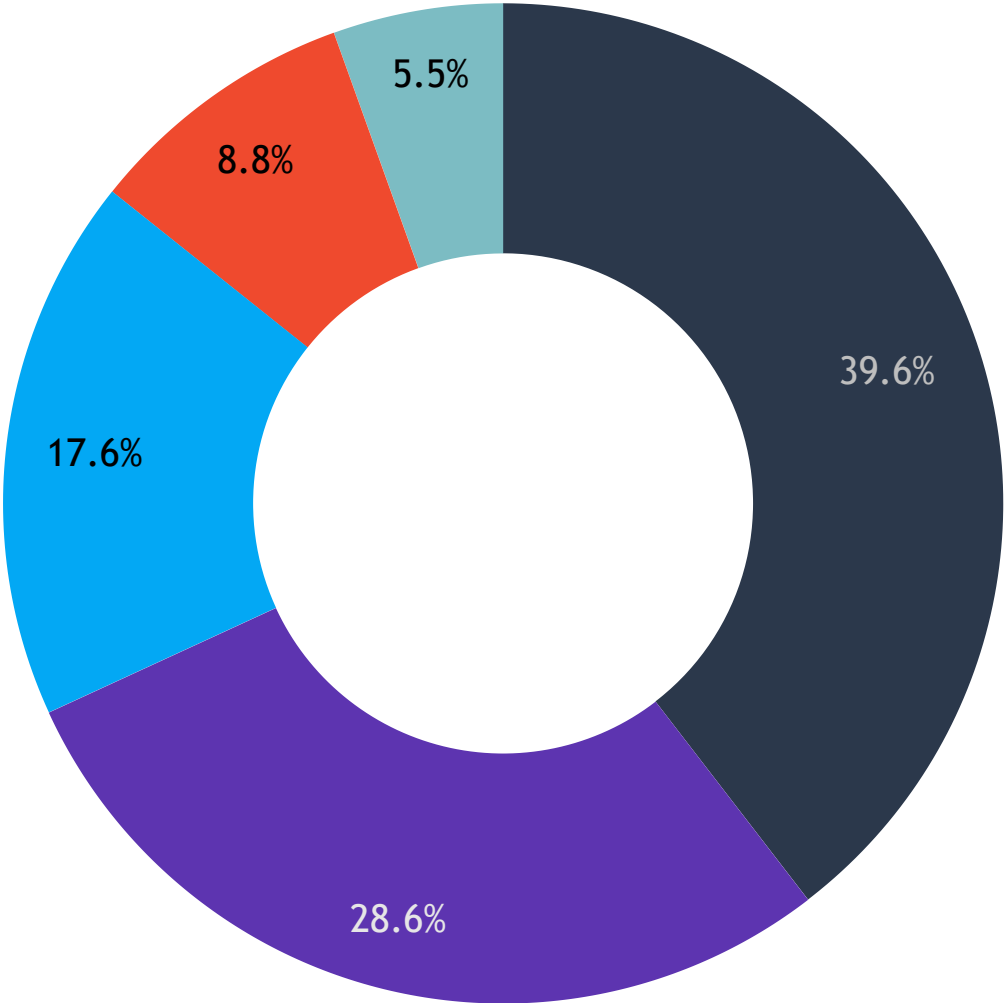
Communication Infrastructure



Health & Safety

Total Respondents

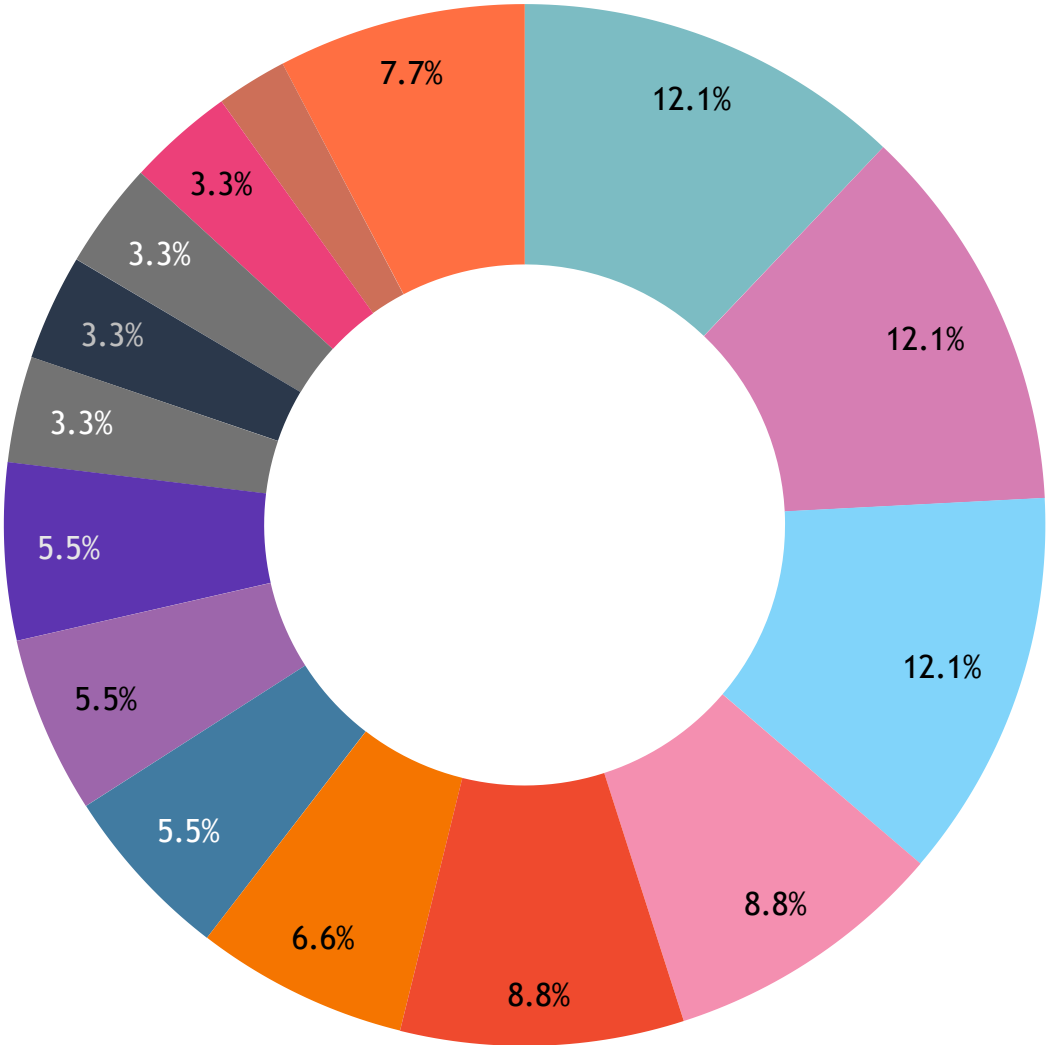
91



- Community Leaders
- Great Falls Montana Tourism Industry Partners
- Great Falls Montana Tourism Board and Staff
- Government Leaders
- Customers

Total Respondents

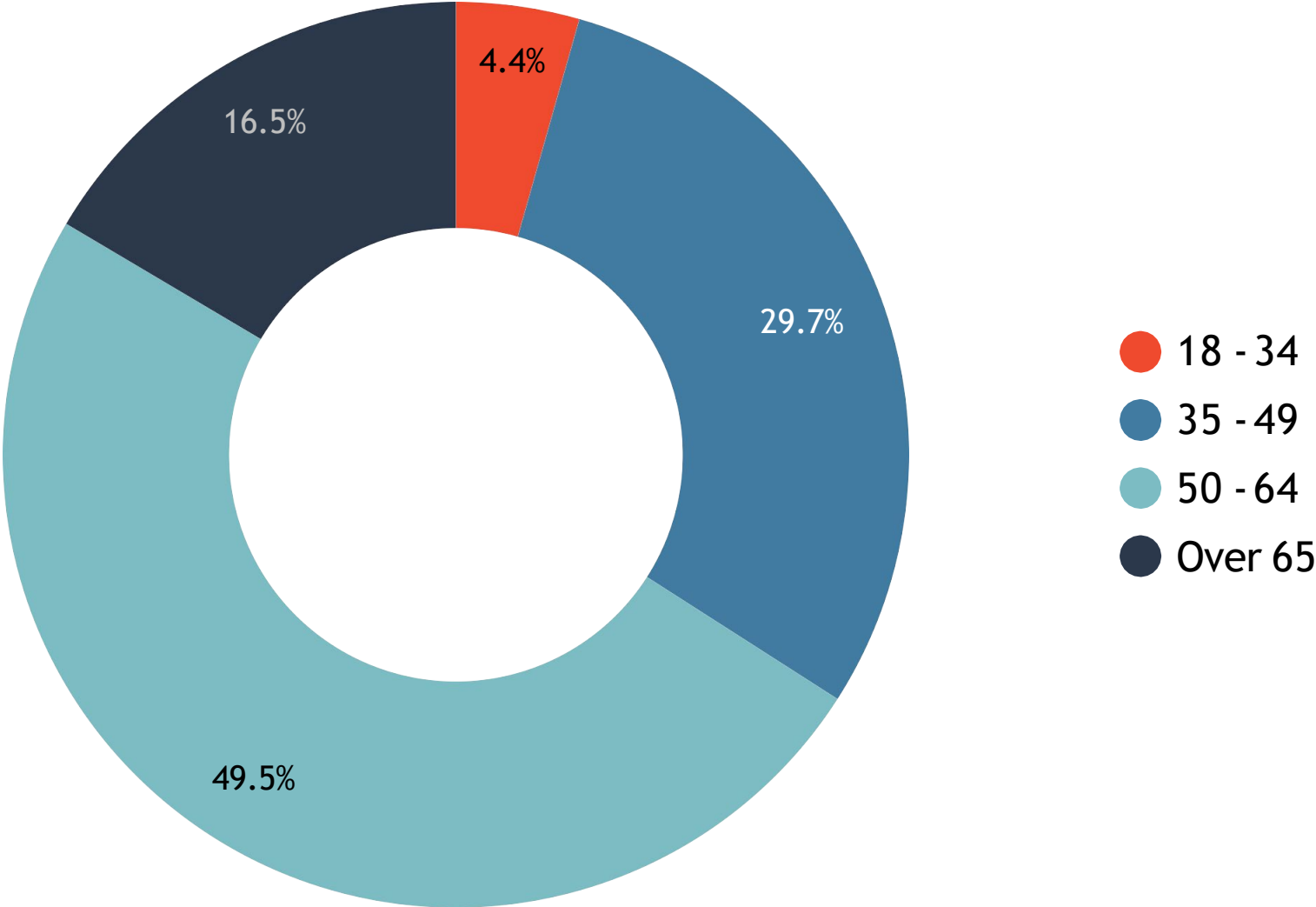
91



- Corporate Leaders
- Great Falls Montana Tourism Board of Directors (CVB and TBID)
- Non-Profit Staff, Non-Profit Volunteers, Community Volunteers
- Retail
- Economic Development
- Entertainment / Venues / Events
- Sports and Event Planners
- Attractions
- Great Falls Montana Tourism Staff
- Education
- Hoteliers
- Chambers of Commerce
- Arts & Culture
- Elected Municipal Officials
- others

Total Respondents

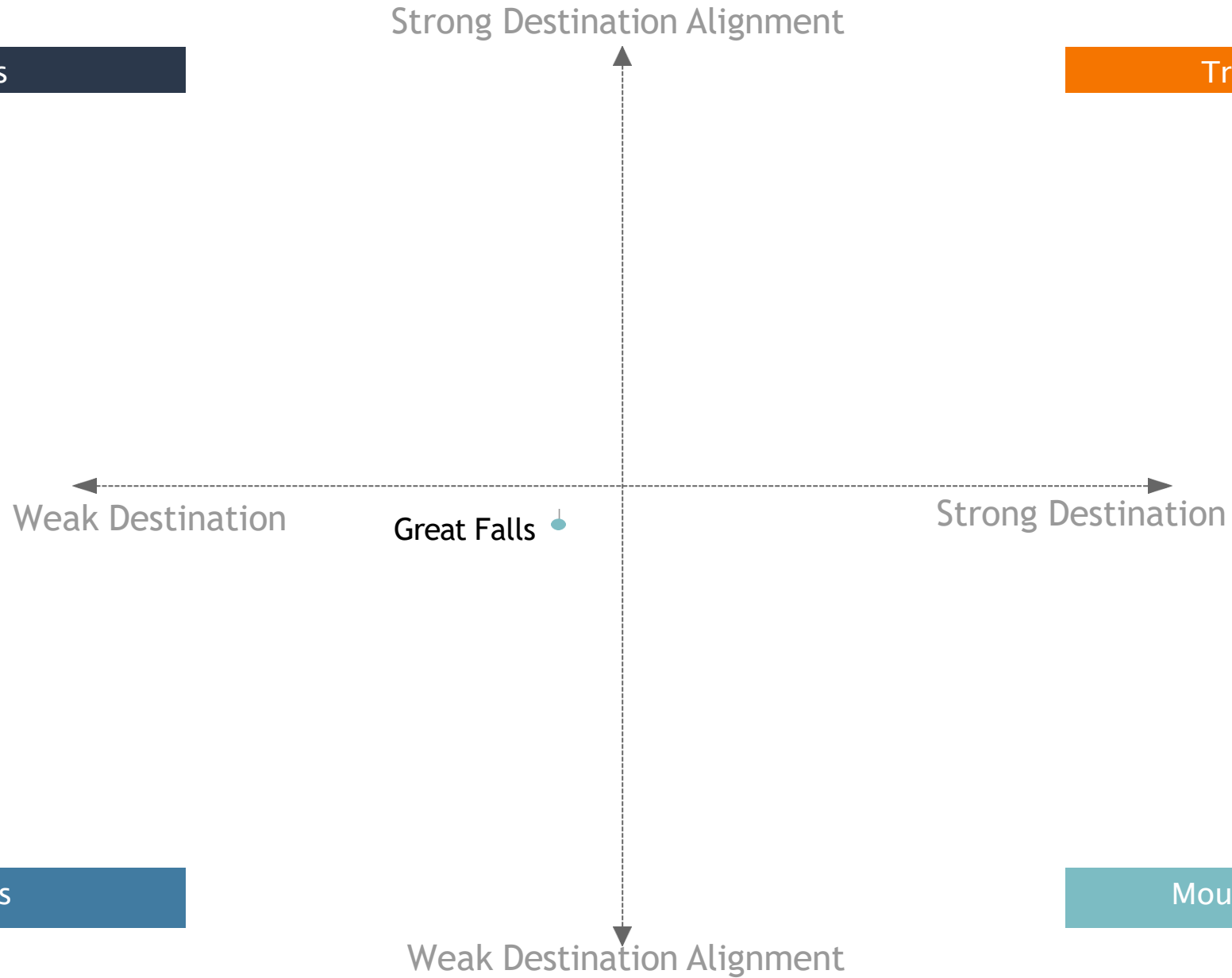
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Overall Assessment

Voyagers

Trailblazers



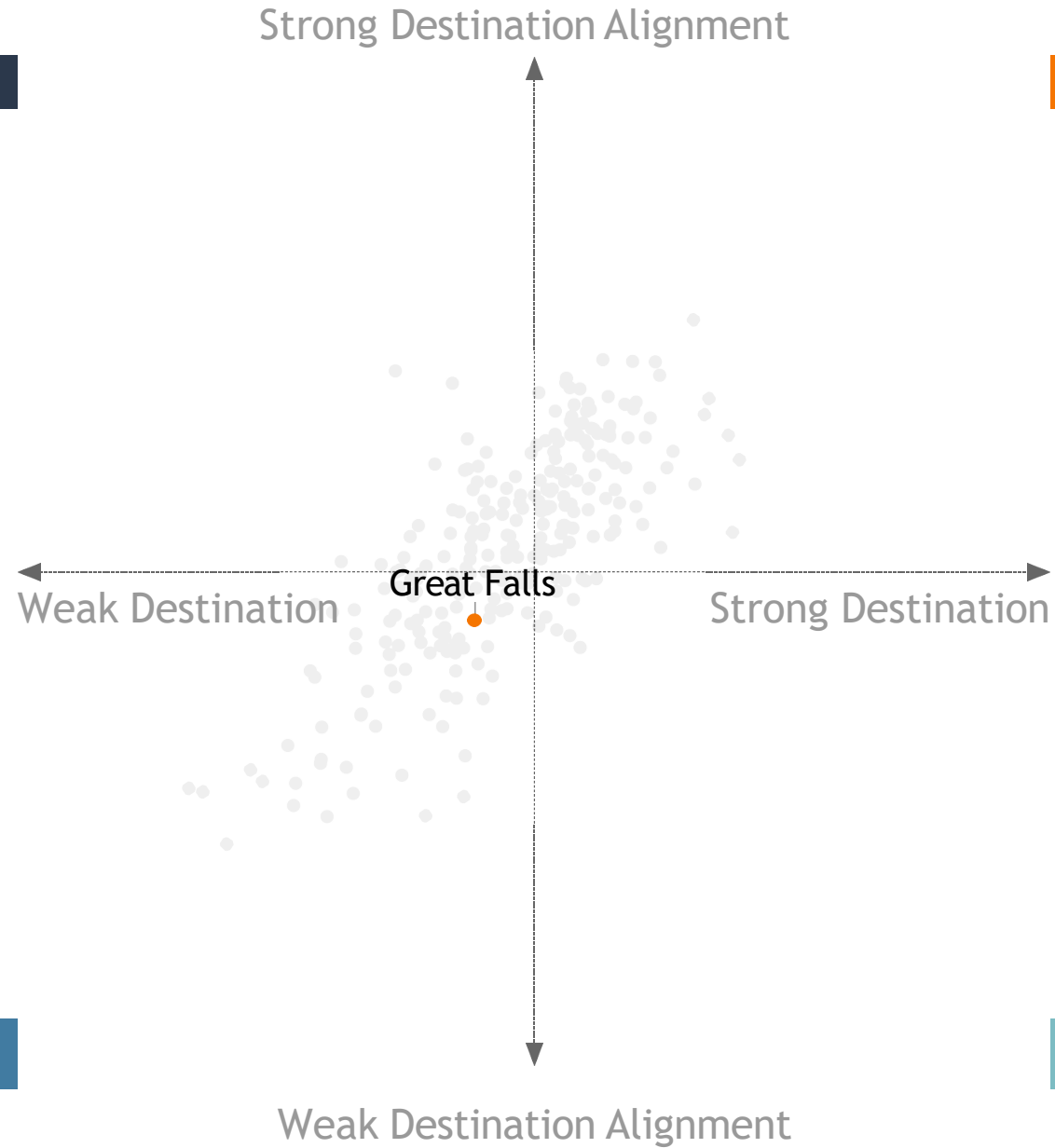
Explorers

Mountaineers

Destination vs. Industry Average

Voyagers

Trailblazers



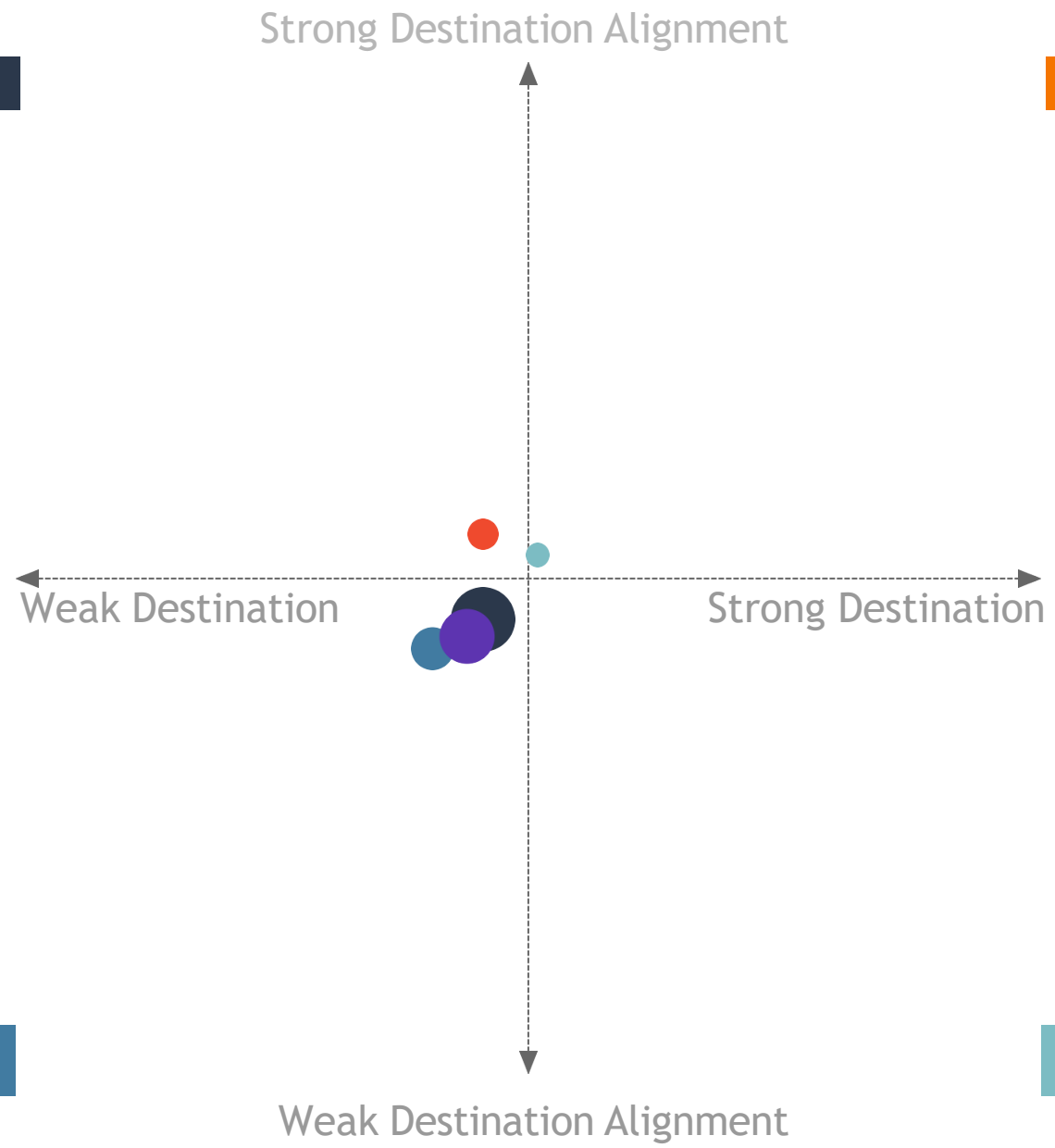
Explorers

Mountaineers

Stakeholder Groups

Voyagers

Trailblazers



- Overall
- Community Leaders
- Customers
- Government Leaders
- Great Falls Montana Tourism Board and Staff
- Great Falls Montana Tourism Industry Partners

Explorers

Mountaineers

Stakeholder Categories

Voyagers

Trailblazers



Explorers

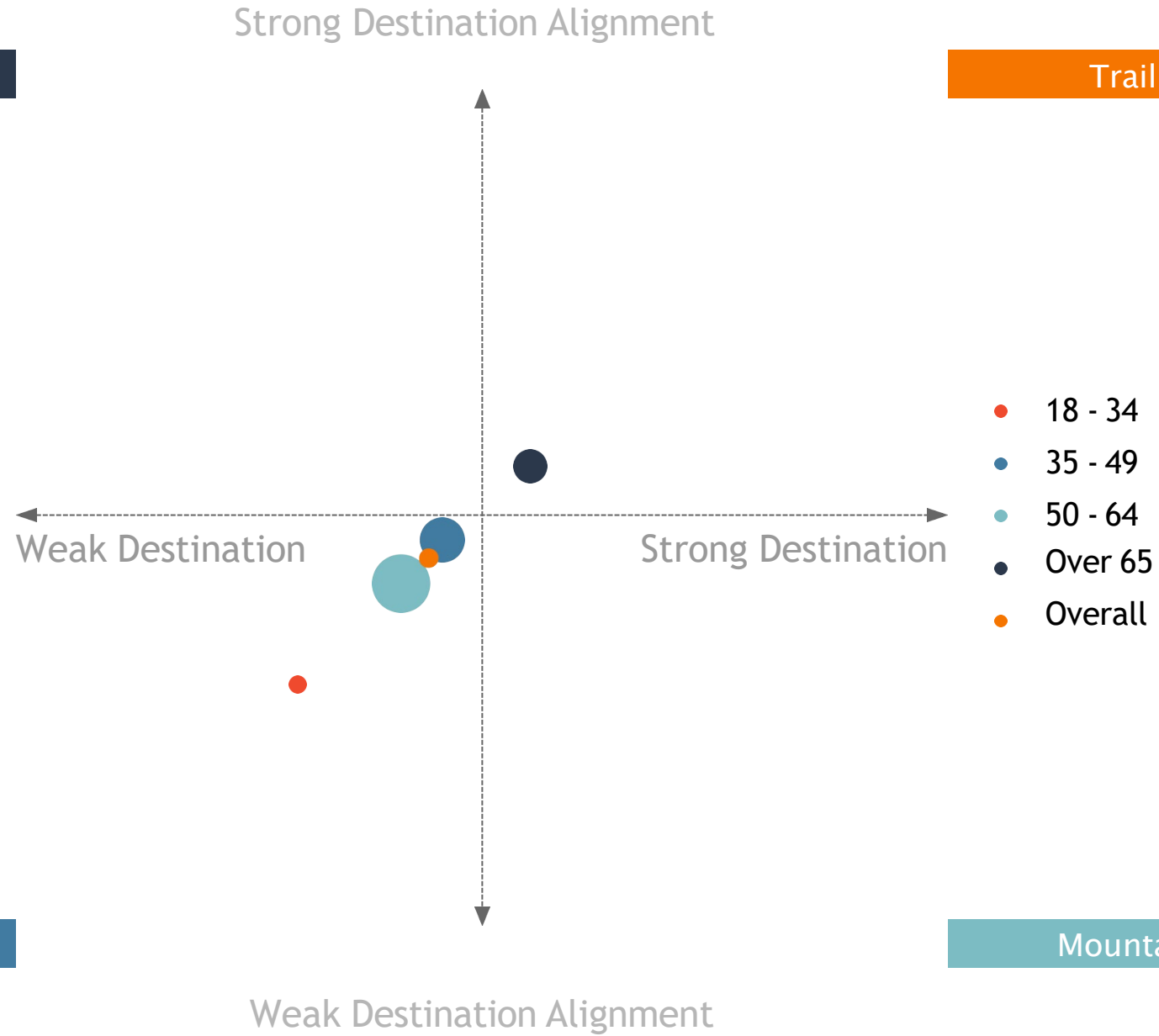
Mountaineers

- Attractions
- Corporate Leaders
- Economic Development
- Entertainment / Venues / Events
- Great Falls Montana Tourism Board of Directors (CVB and TBID)
- Great Falls Montana Tourism Staff
- Non-Profit Staff, Non-Profit Volunteers, Community Volunteers
- Overall
- Retail
- Sports and Event Planners

Stakeholder Roles with <5 respondents hidden to maintain confidentiality.

Voyagers

Trailblazers

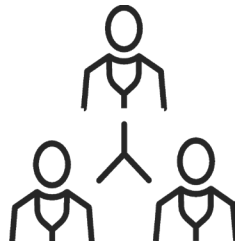


Explorers

Mountaineers

Weak Destination Alignment

Community Alignment Variables



Business Support



Community Group & Resident Support



Government Support



Organization Governance



Workforce Development



Hospitality Culture



Equity, Diversity & Inclusion



Funding Support & Certainty



Regional Cooperation



Sustainability & Resilience

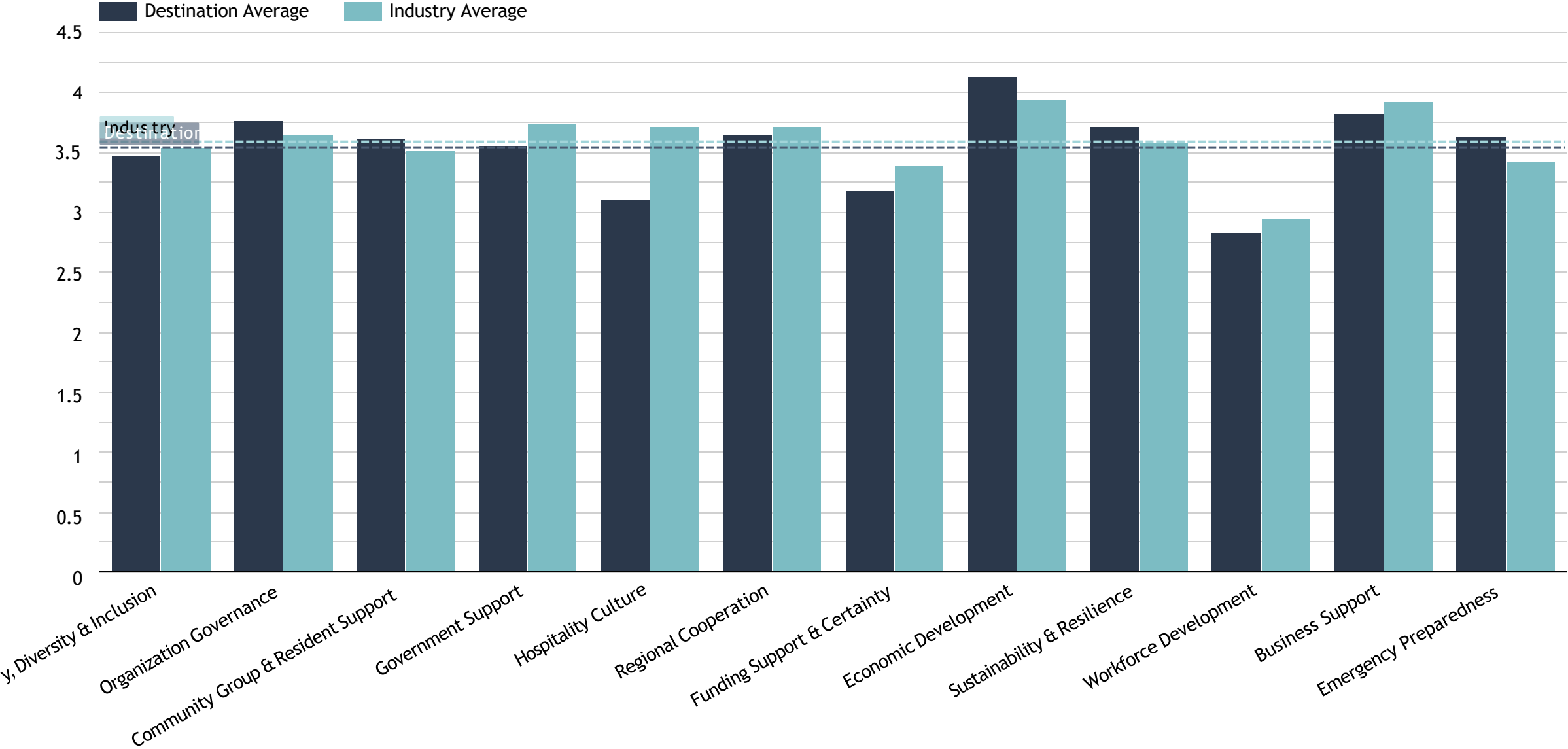


Emergency Preparedness



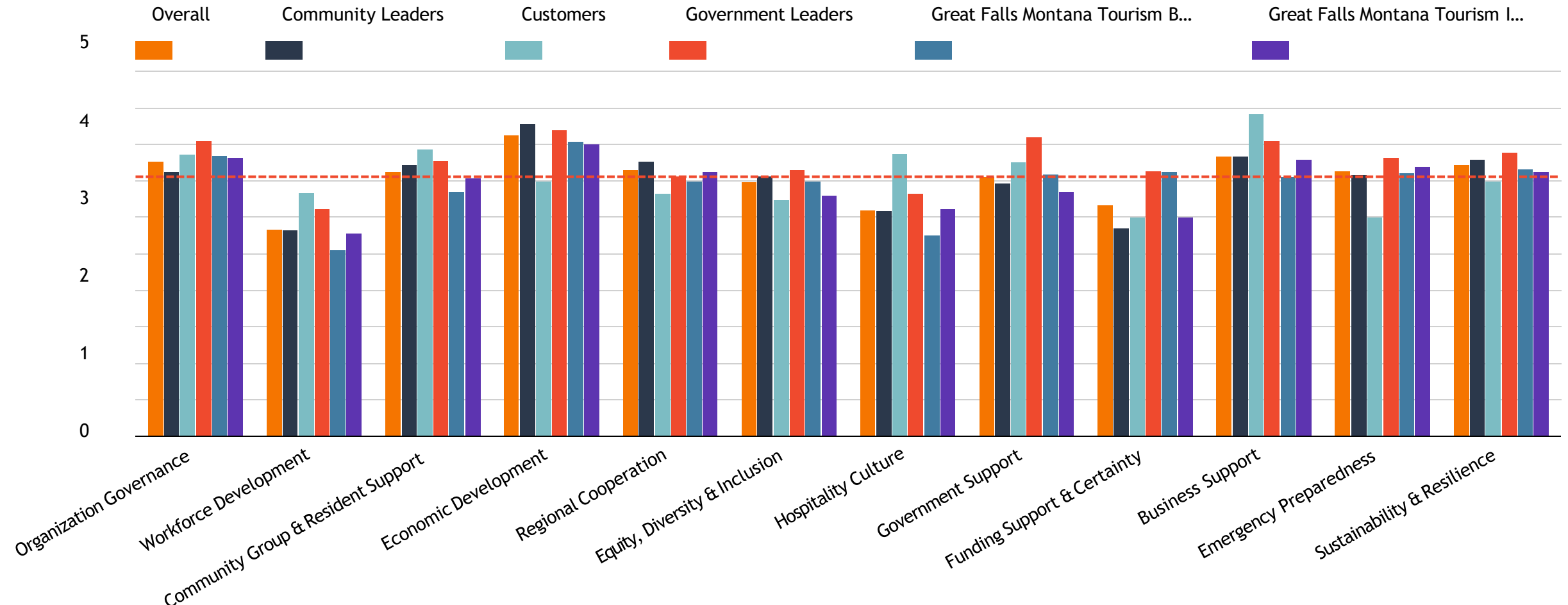
Economic Development

Community Alignment: Perceived Performance

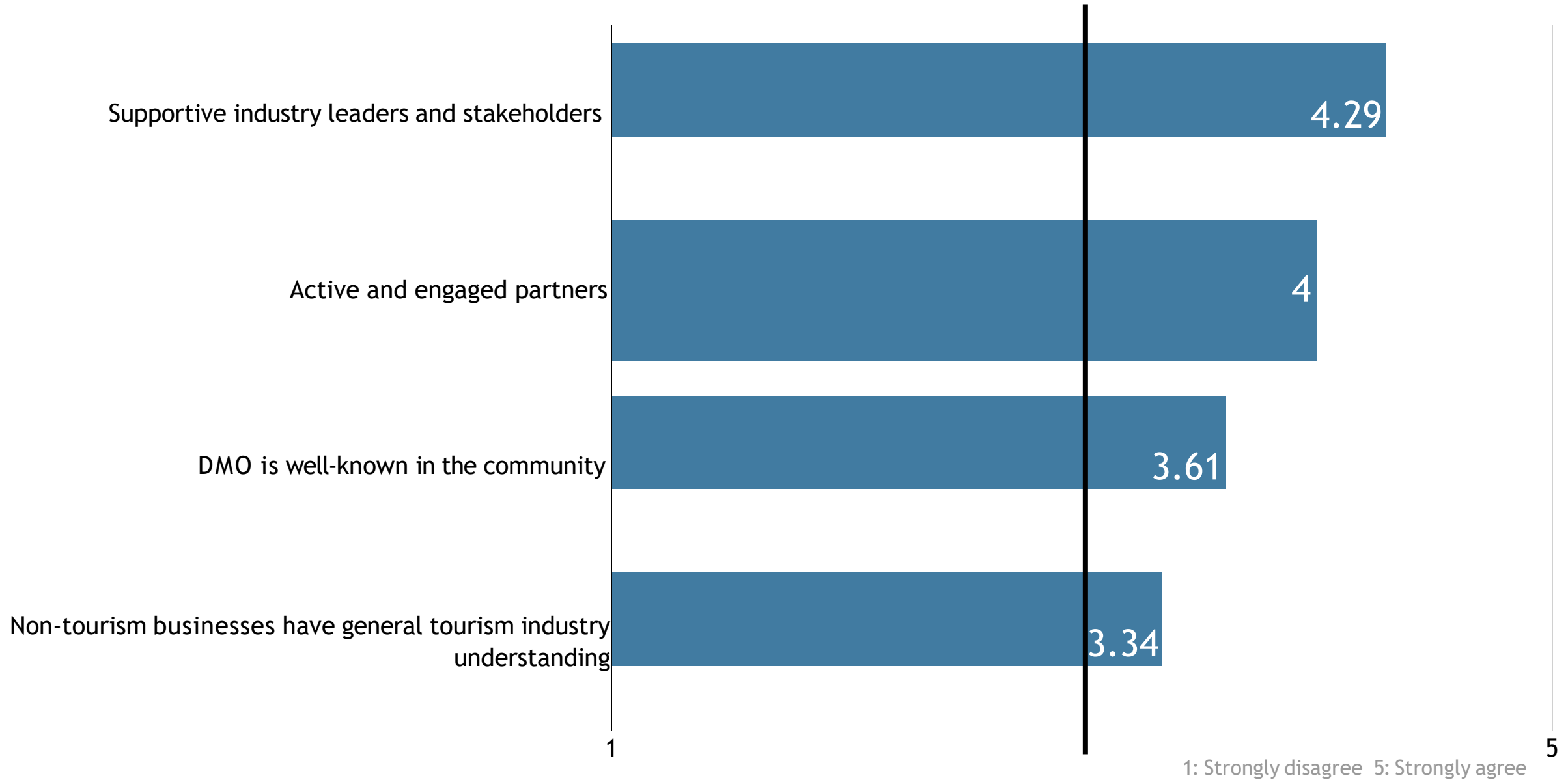


Community Alignment: Perceived Performance by Stakeholder Group

Scenario: Explorers

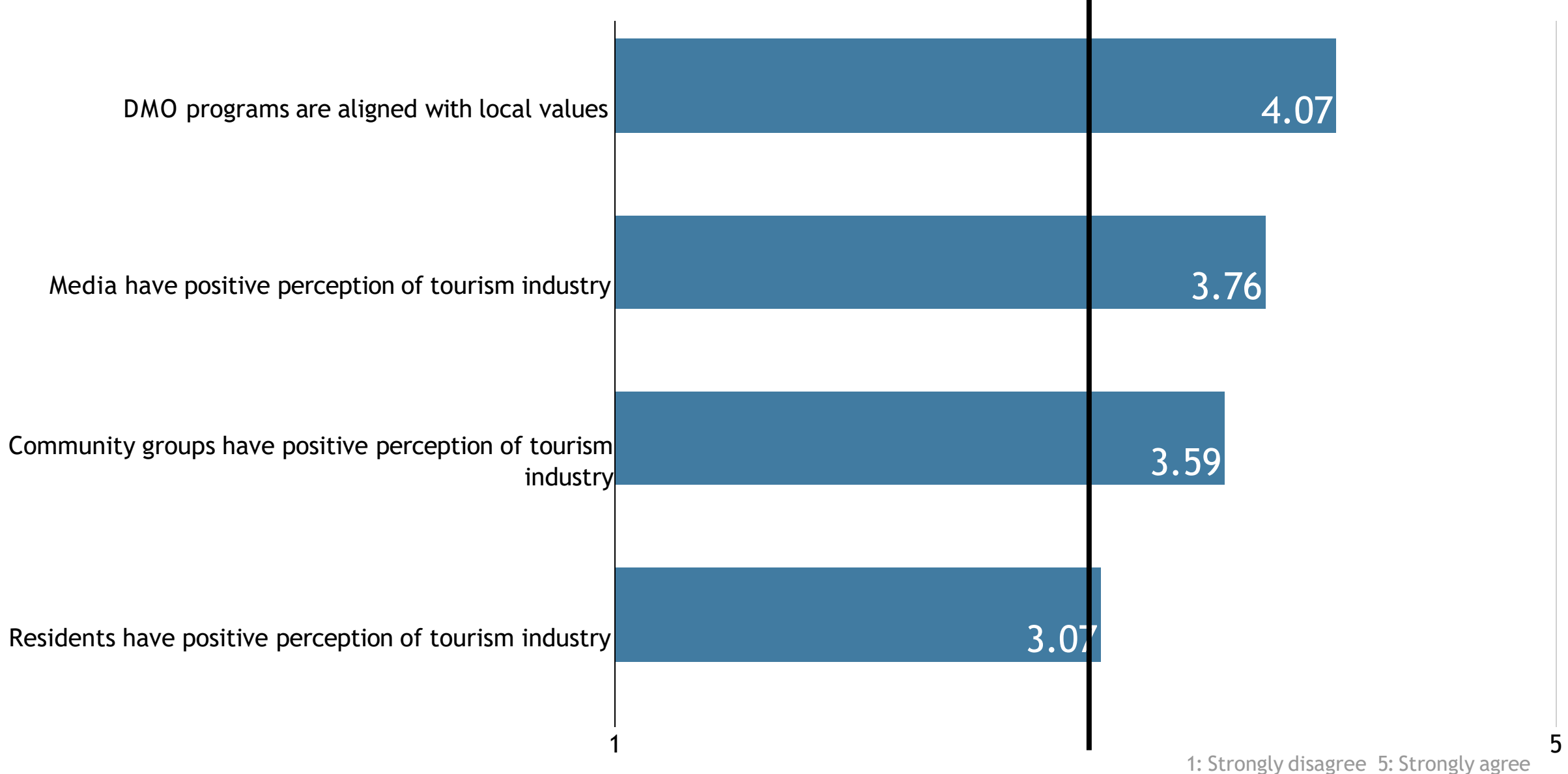


Community Alignment	Industry Average	Destination
	3.55	3.48



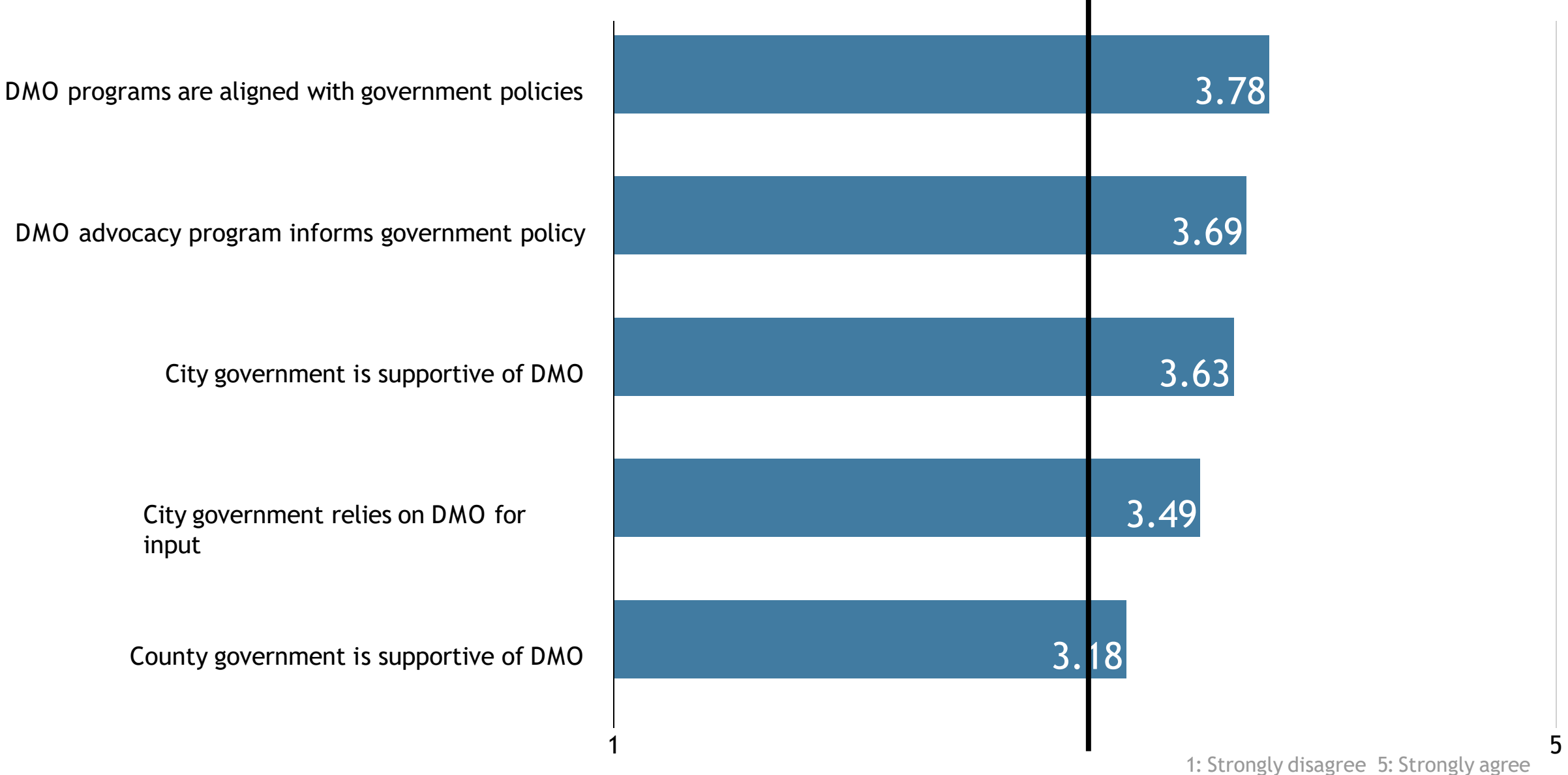
1: Strongly disagree 5: Strongly agree

Community & Resident Support



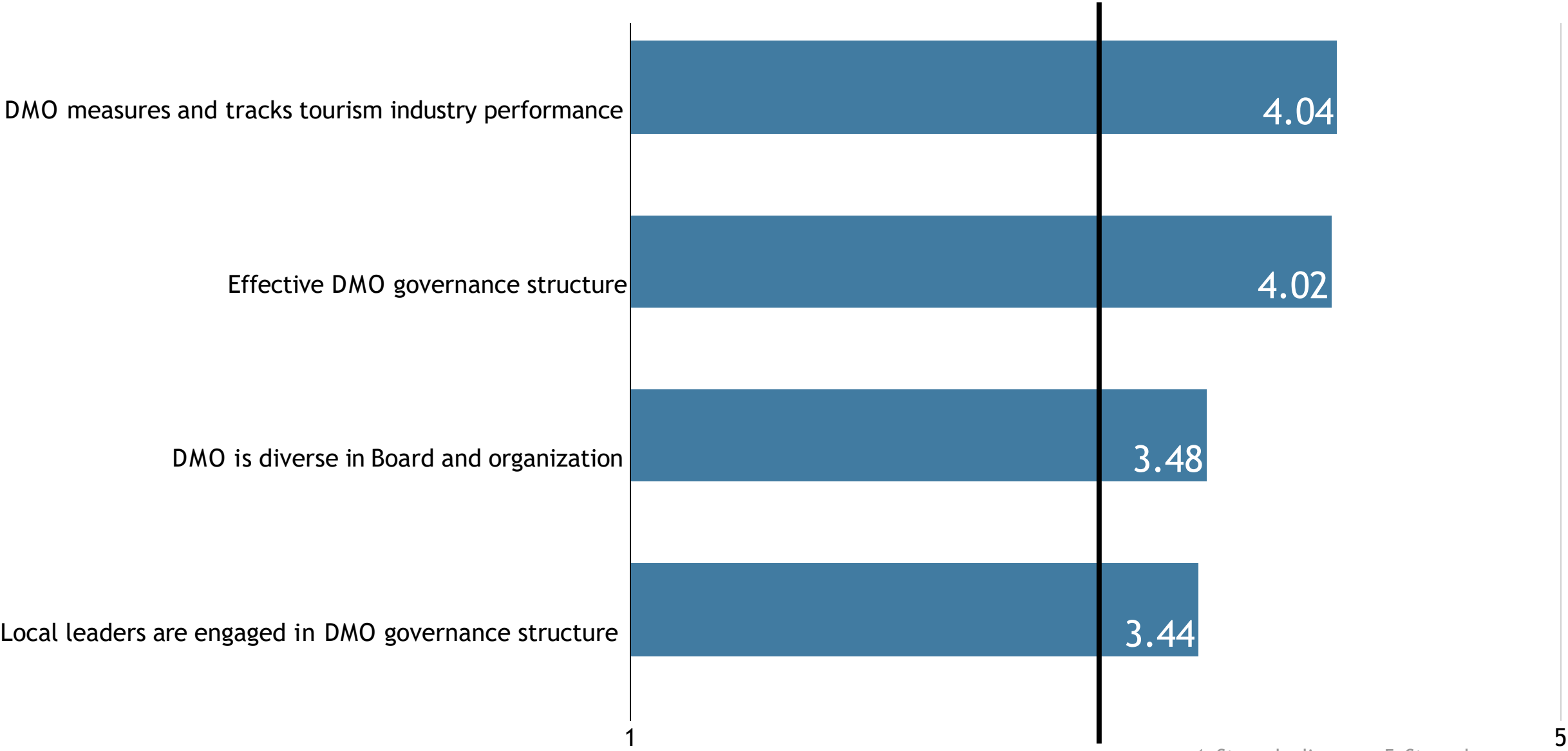
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Government Support

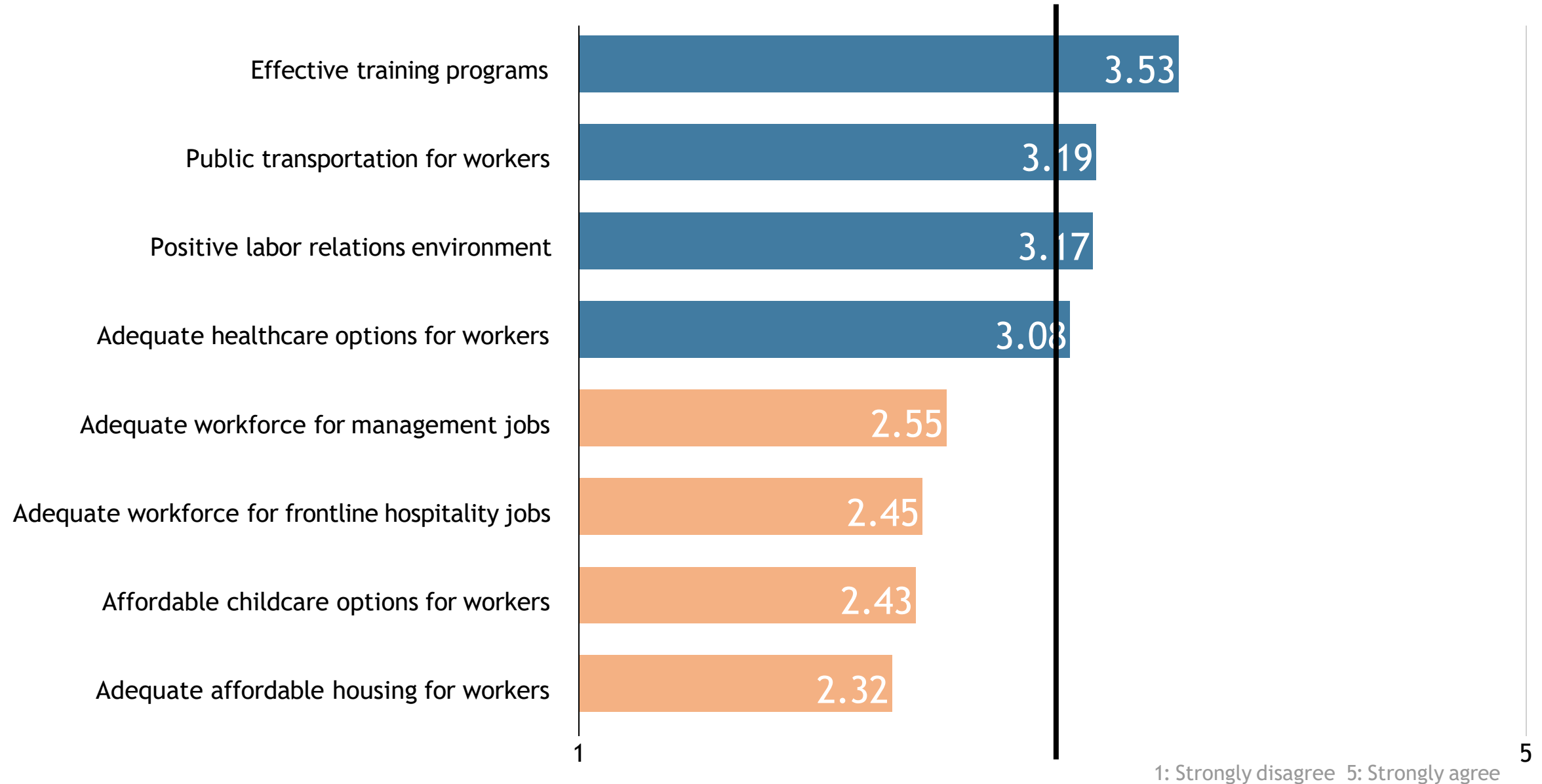


1: Strongly disagree 5: Strongly agree

Organization Governance Model

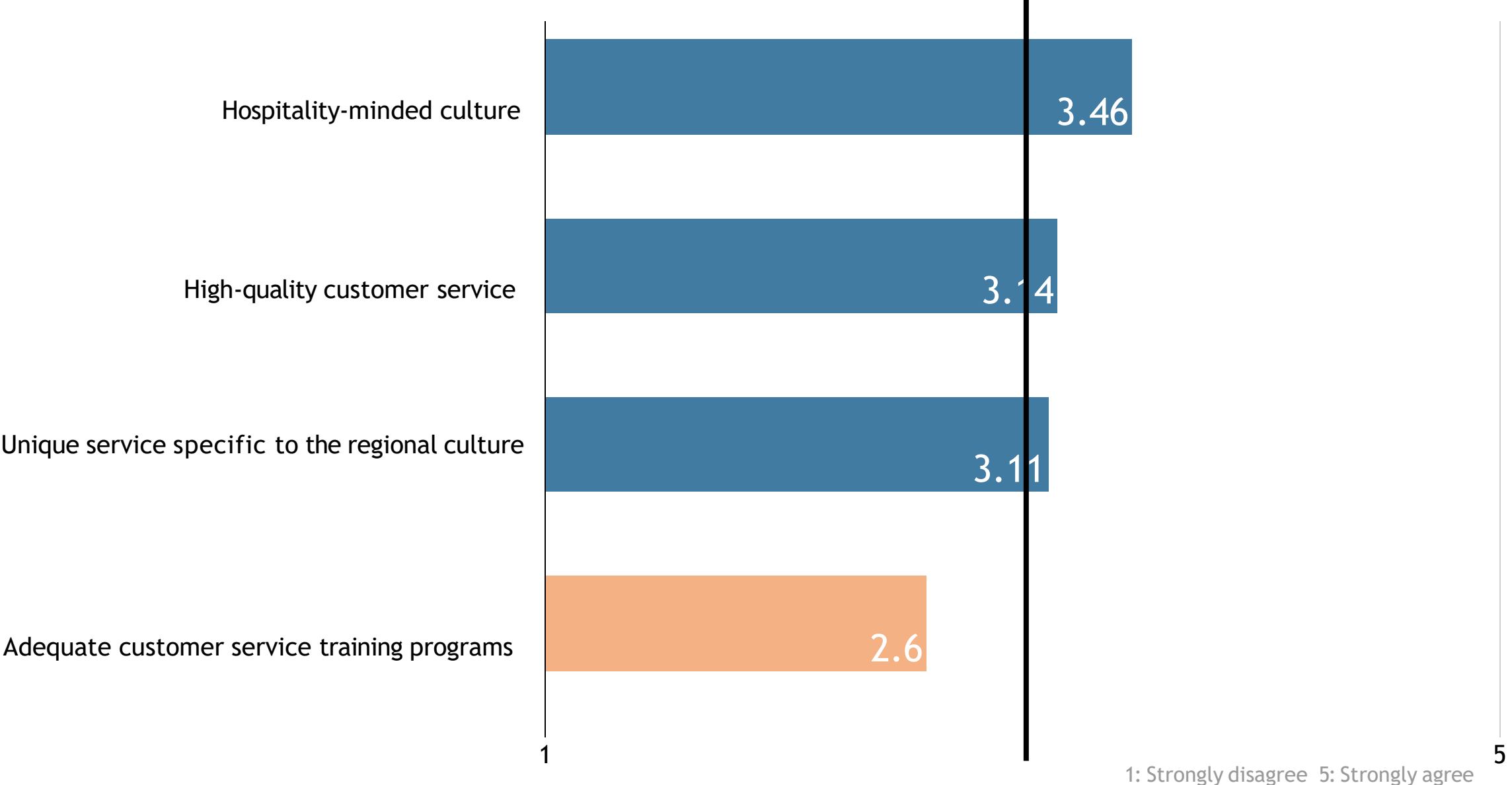


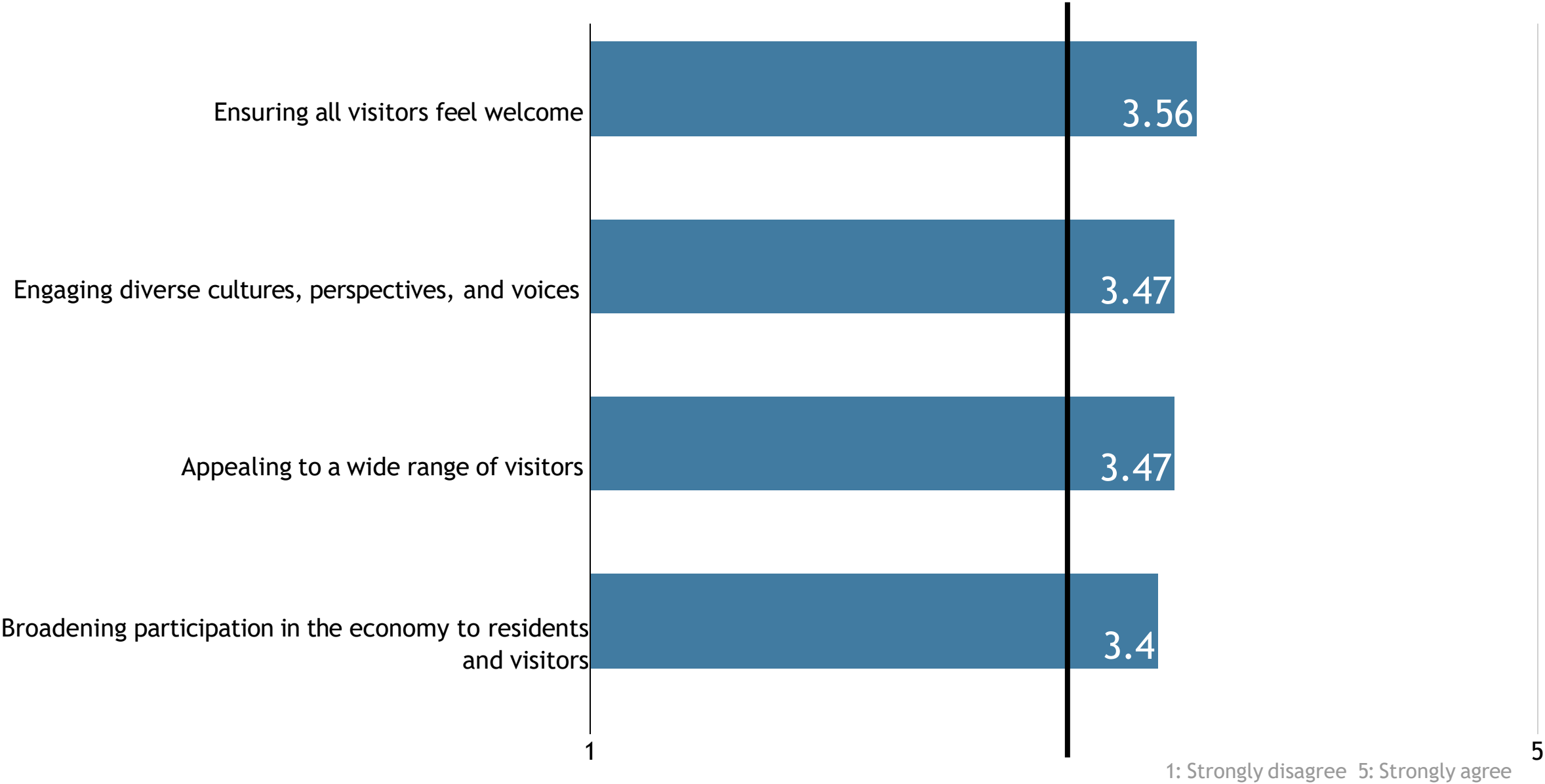
1: Strongly disagree 5: Strongly agree



1: Strongly disagree 5: Strongly agree

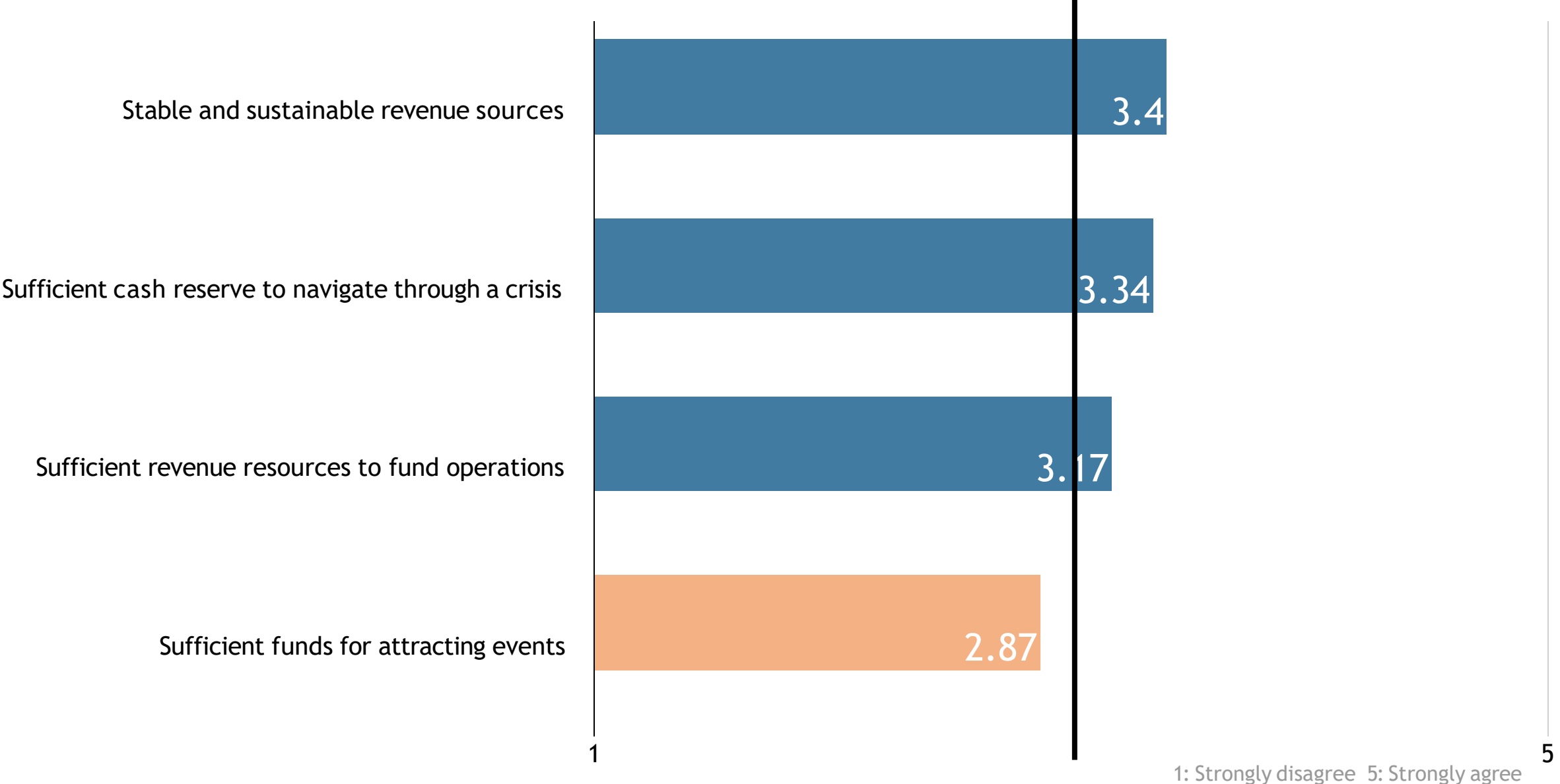
Hospitality Culture





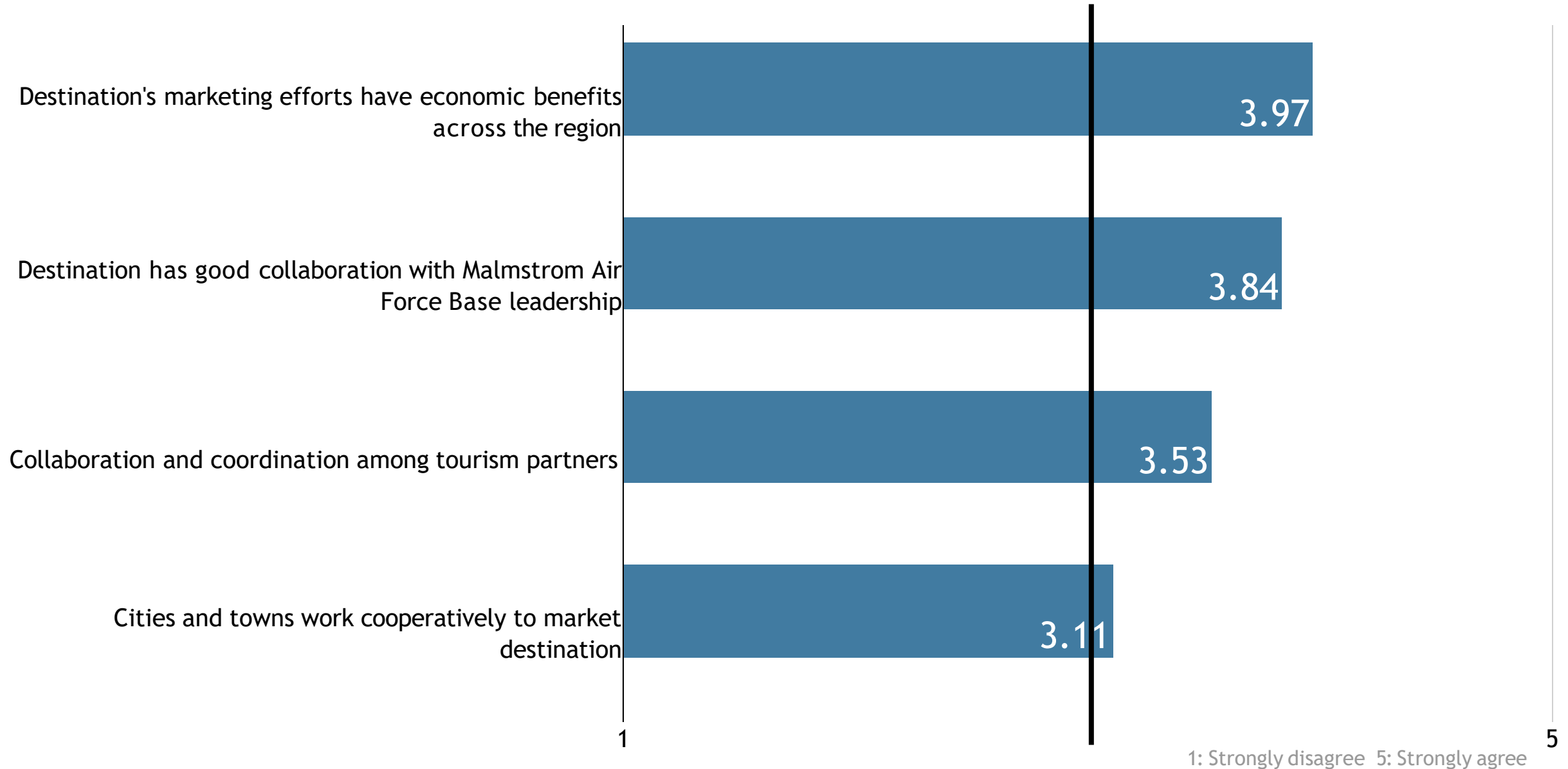
1: Strongly disagree 5: Strongly agree

Funding Support & Certainty

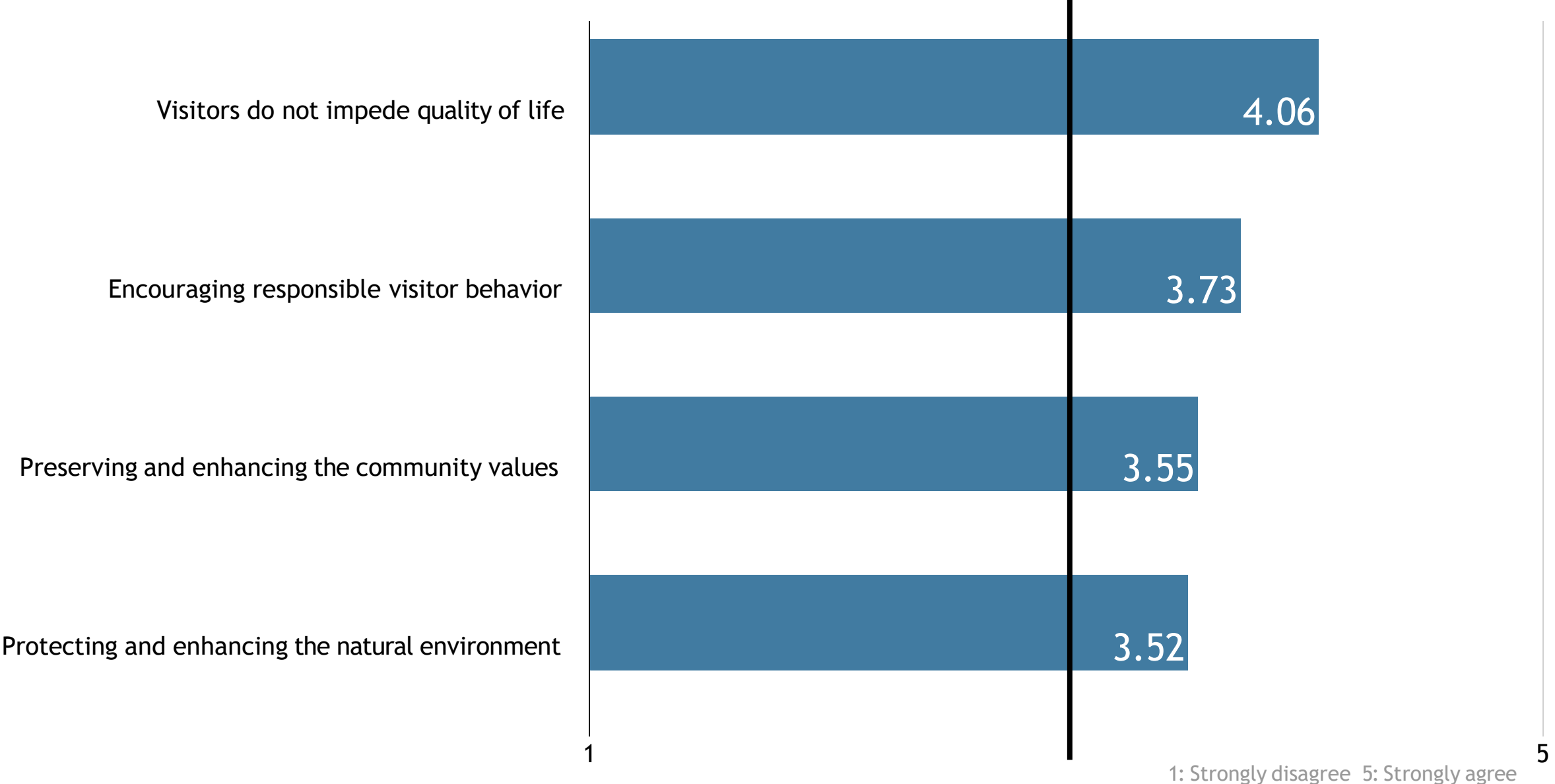


1: Strongly disagree 5: Strongly agree

Regional Cooperation

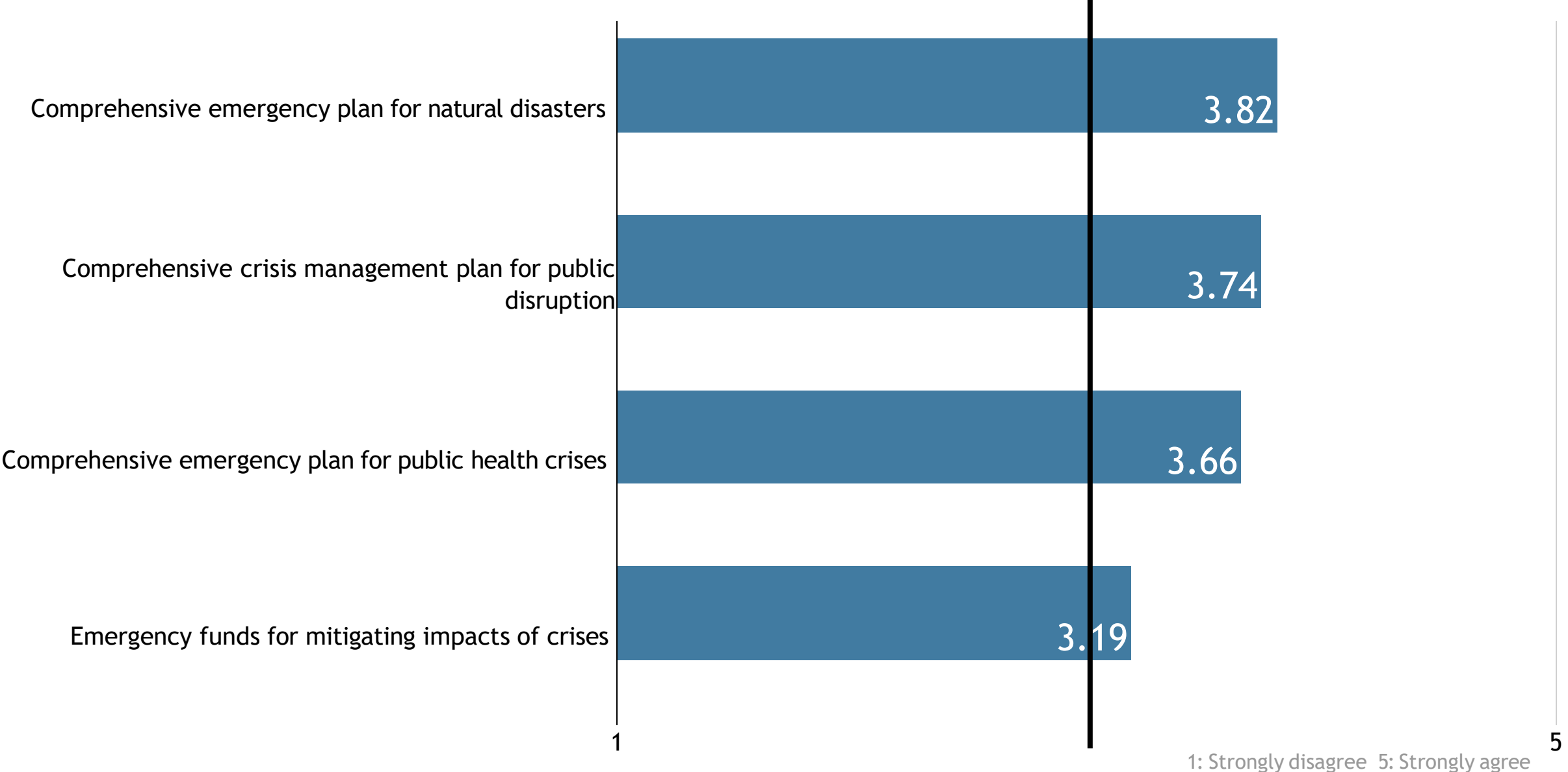


1: Strongly disagree 5: Strongly agree



1: Strongly disagree 5: Strongly agree

Emergency Preparedness



1: Strongly disagree 5: Strongly agree



1: Strongly disagree 5: Strongly agree

Community Alignment: Highest Variable Scores

Highest-scored Variables

	Variable	Performance ▾
1.	Economic Development	4.13
2.	Business Support	3.83
3.	Organization Governance	3.77
4.	Sustainability & Resilience	3.72
5.	Regional Cooperation	3.65

Lowest-scored Variables

	Variable	Performance ▲
1.	Workforce Development	2.83
2.	Hospitality Culture	3.11
3.	Funding Support & Certainty	3.18
4.	Equity, Diversity & Inclusion	3.48
5.	Government Support	3.55



Attractions & Experiences



Arts, Culture & Heritage



Dining, Shopping & Entertainment



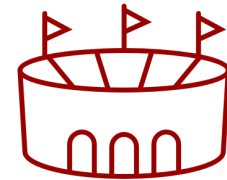
Outdoor Recreation



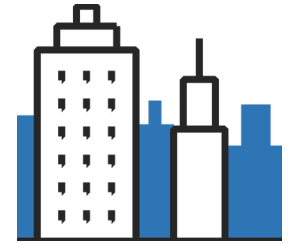
Conventions & Meetings



Events & Festivals



Sporting Events



Accommodation



Local Mobility & Access



Destination Access

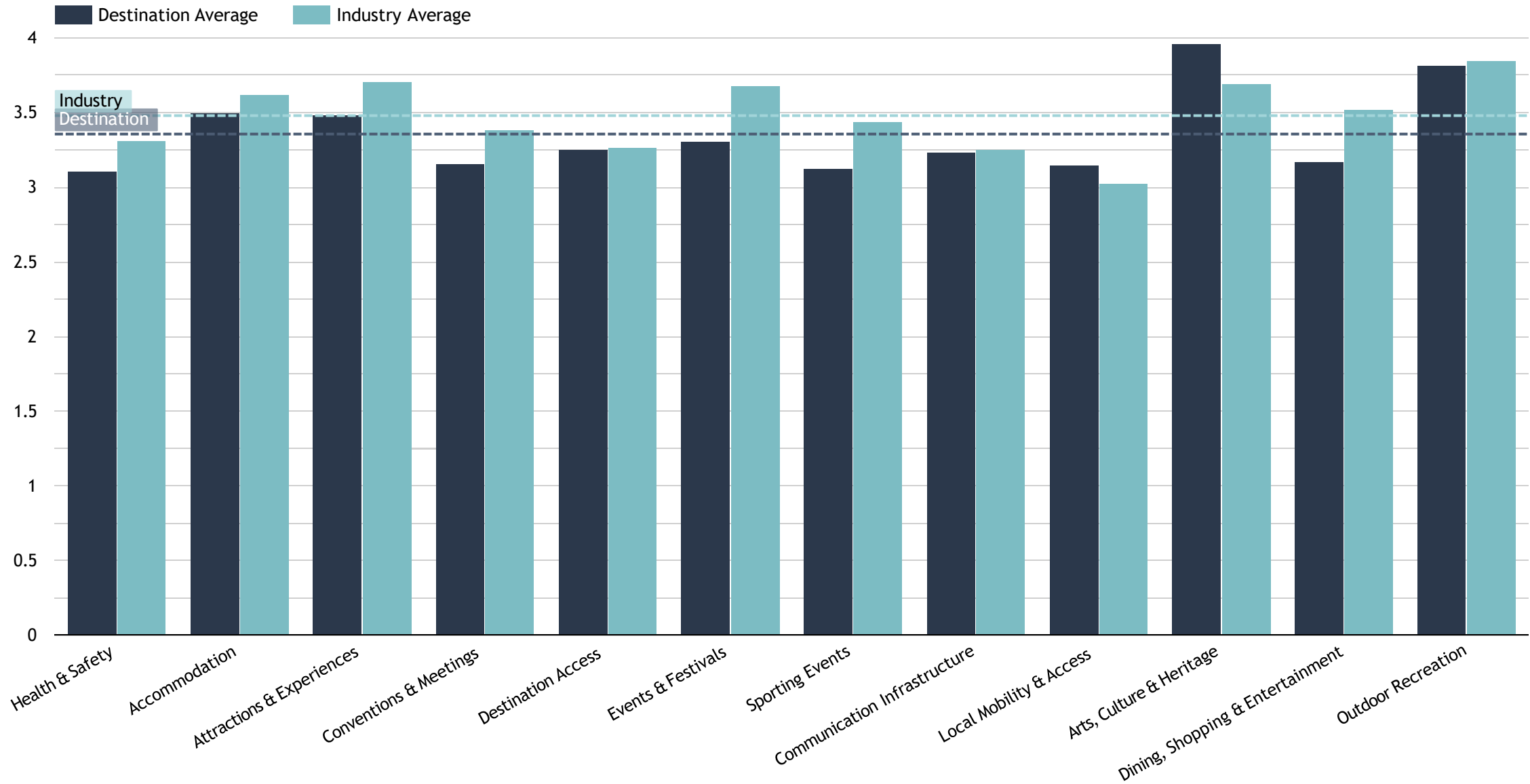


Communication Infrastructure



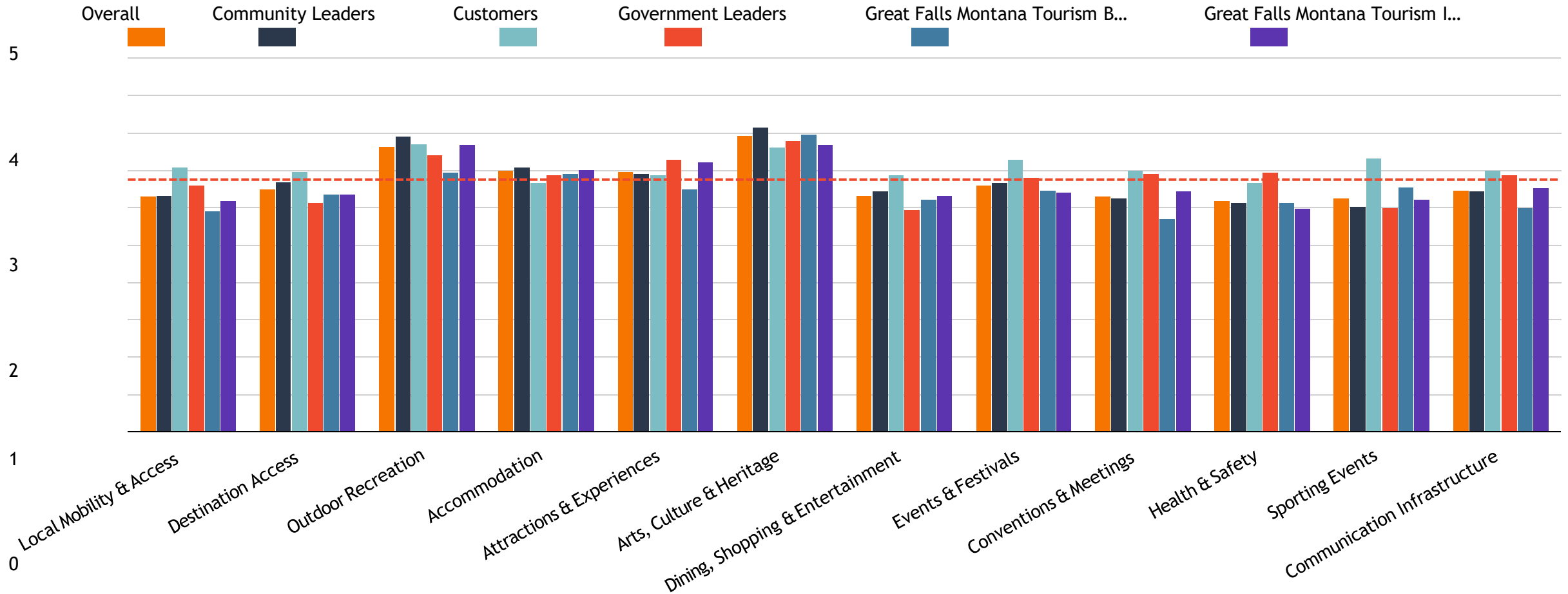
Health & Safety

Destination Strength: Perceived Performance



Destination Strength: Perceived Performance by Stakeholder Group

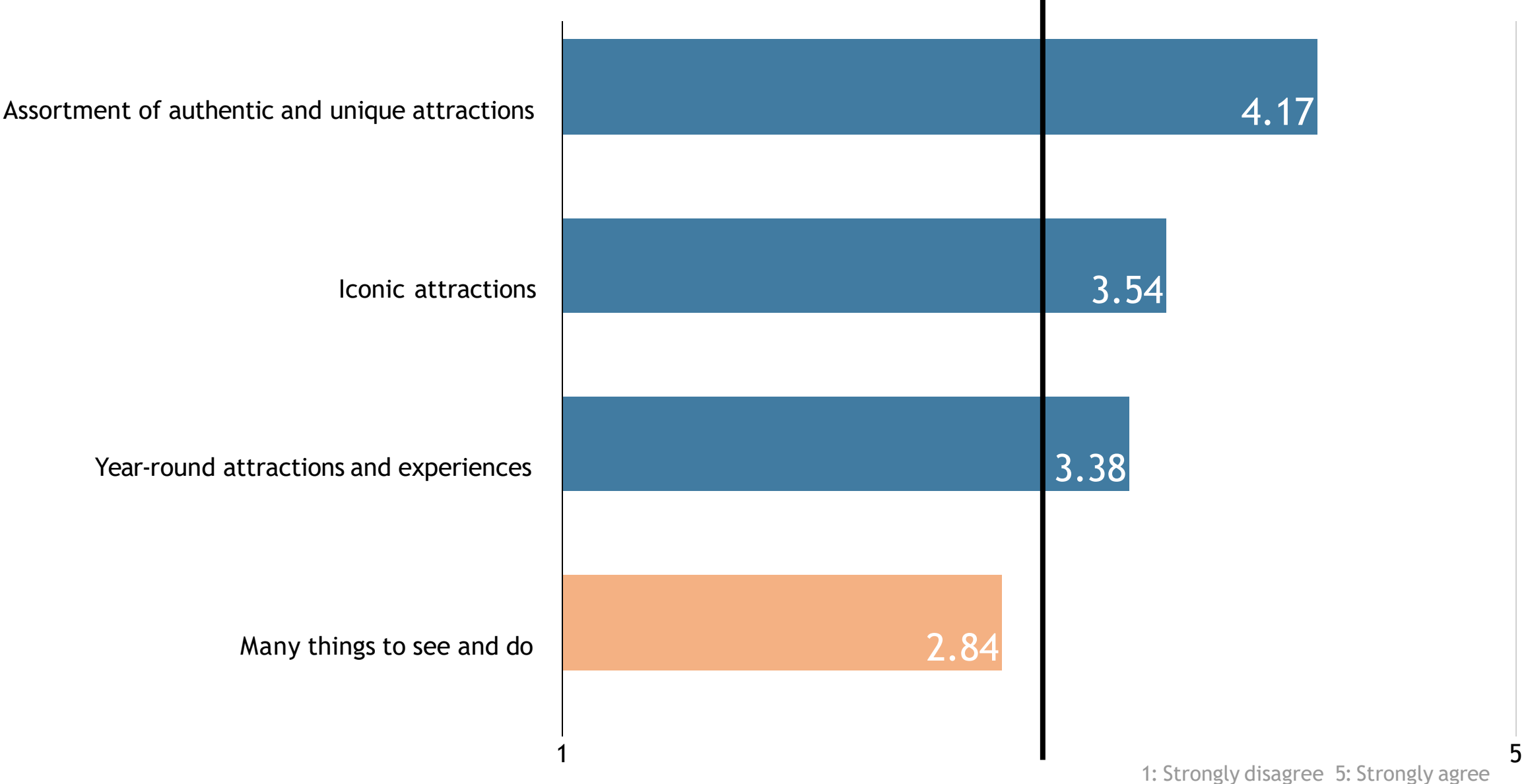
Scenario: Explorers



Destination Strength

Industry Average	3.47
Destination	3.35

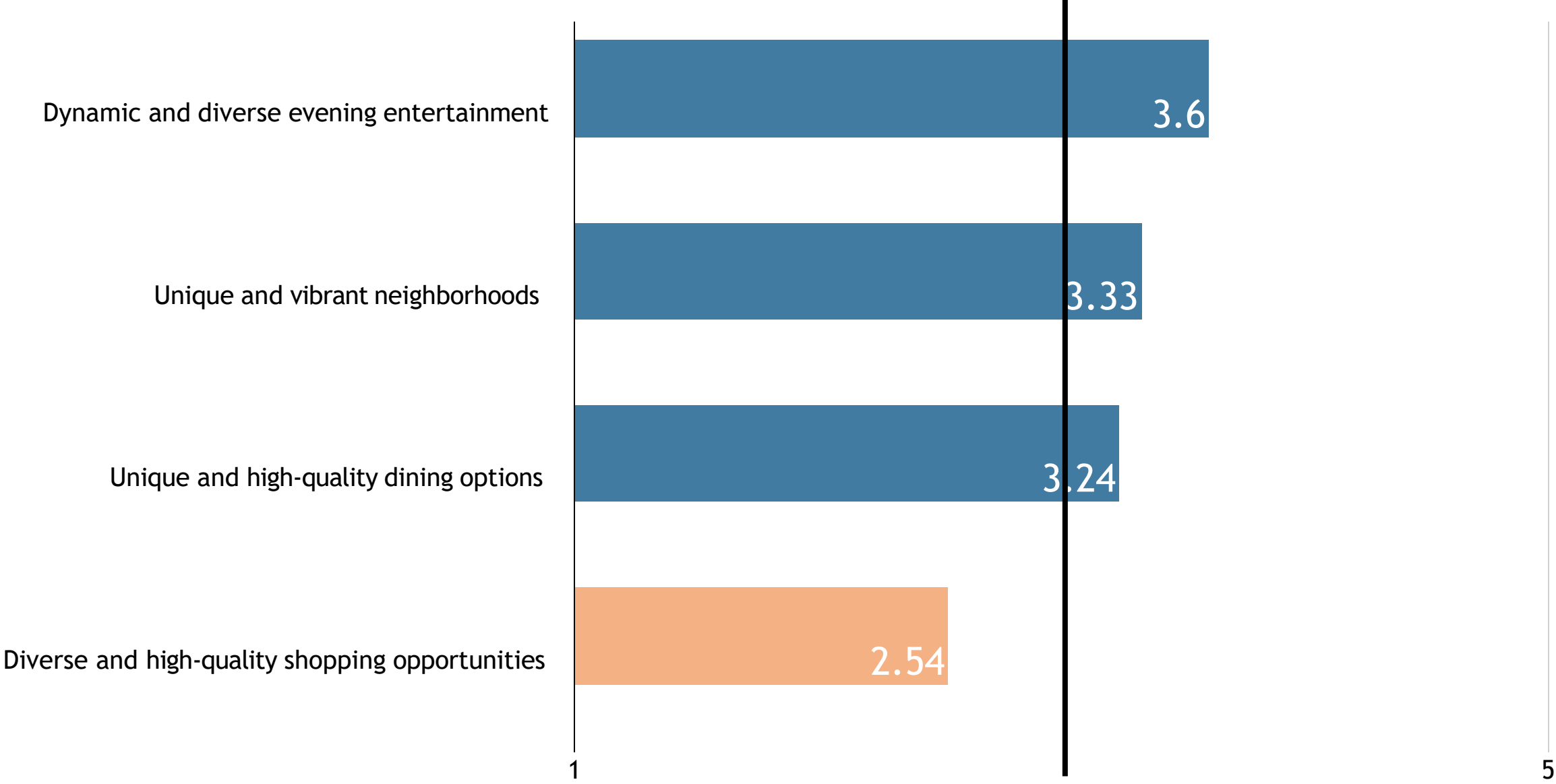
Attractions & Experiences



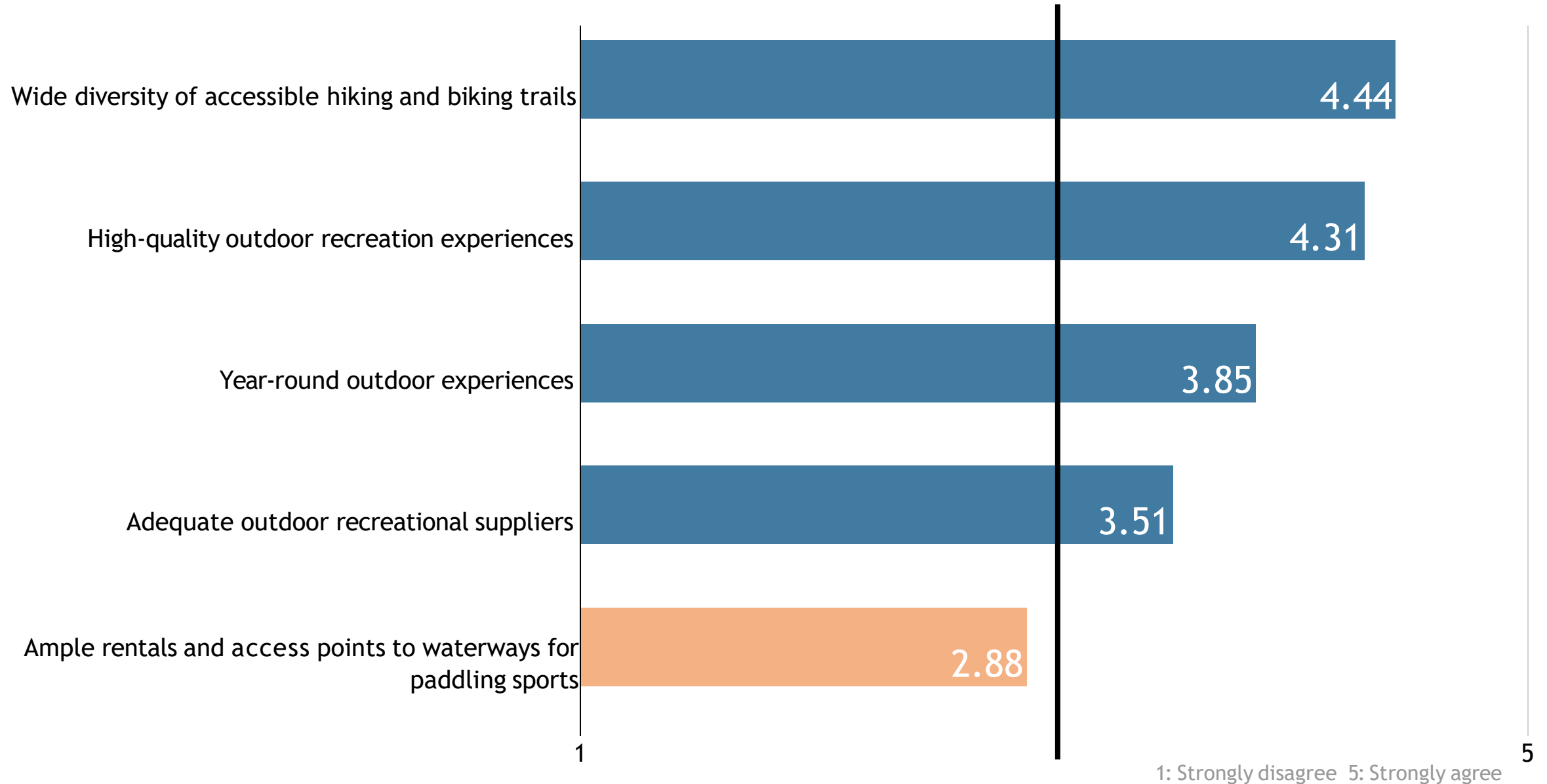


1: Strongly disagree 5: Strongly agree

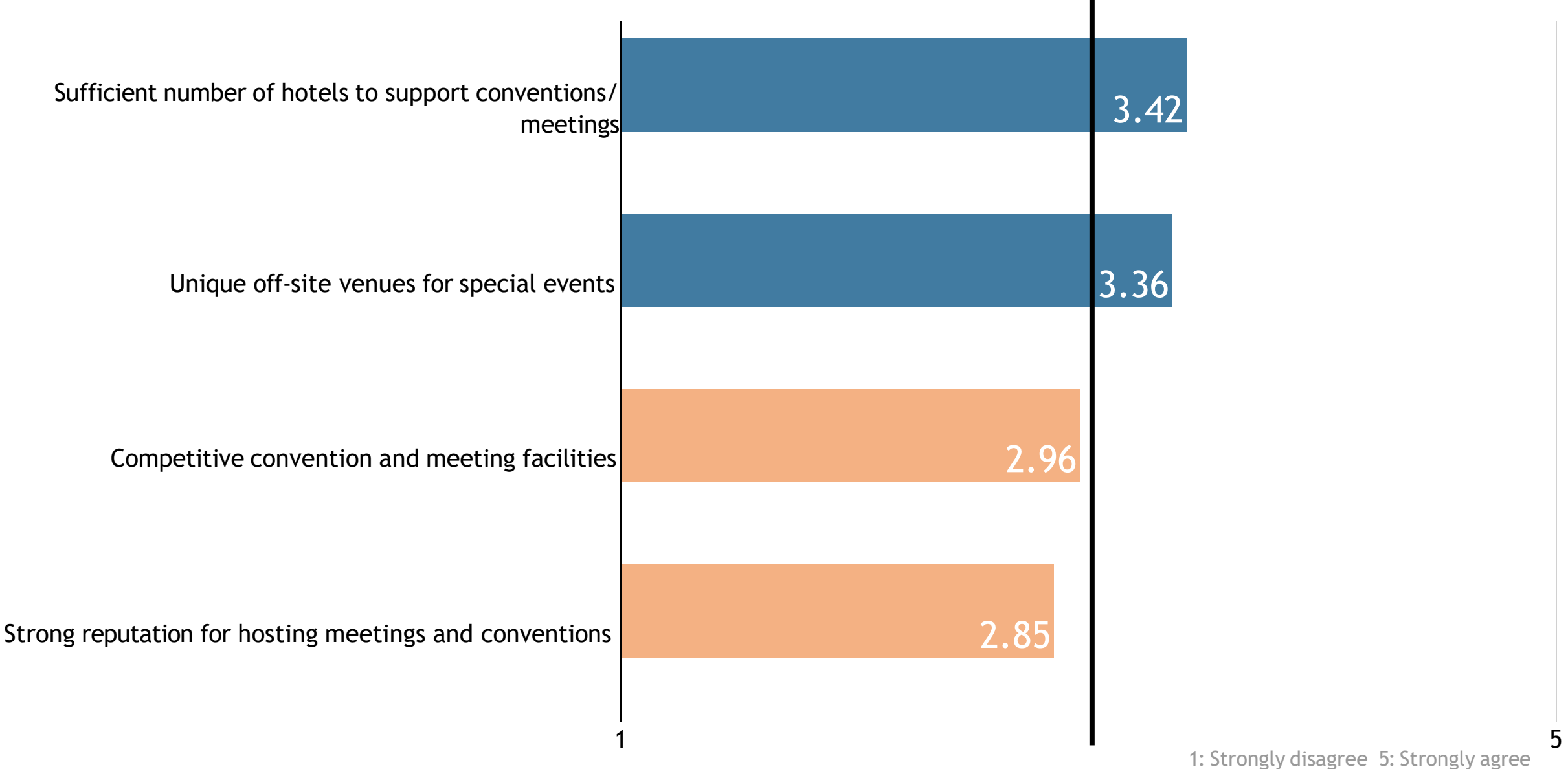
Dining, Shopping & Entertainment



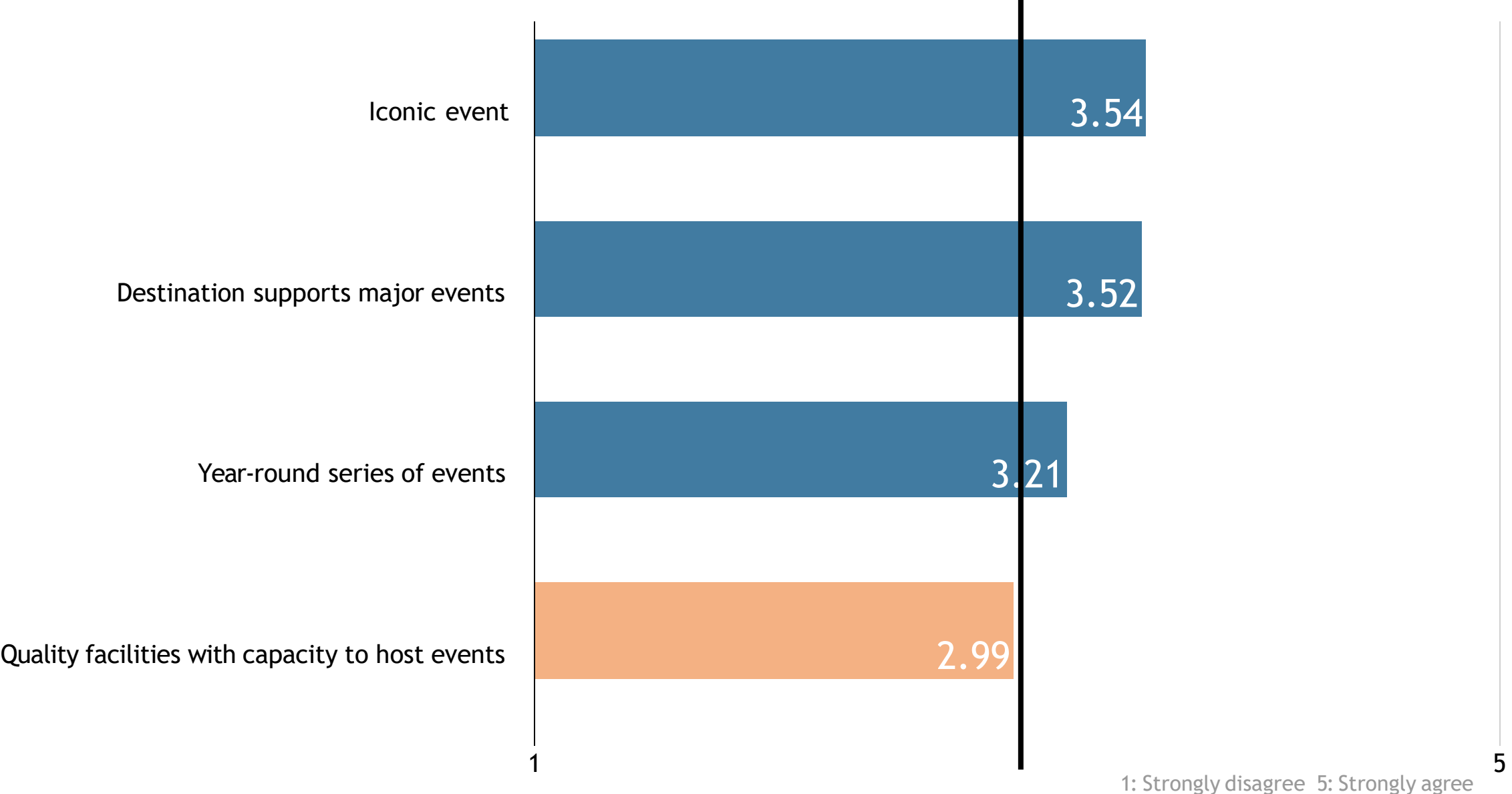
Outdoor Recreation



Conventions & Meetings

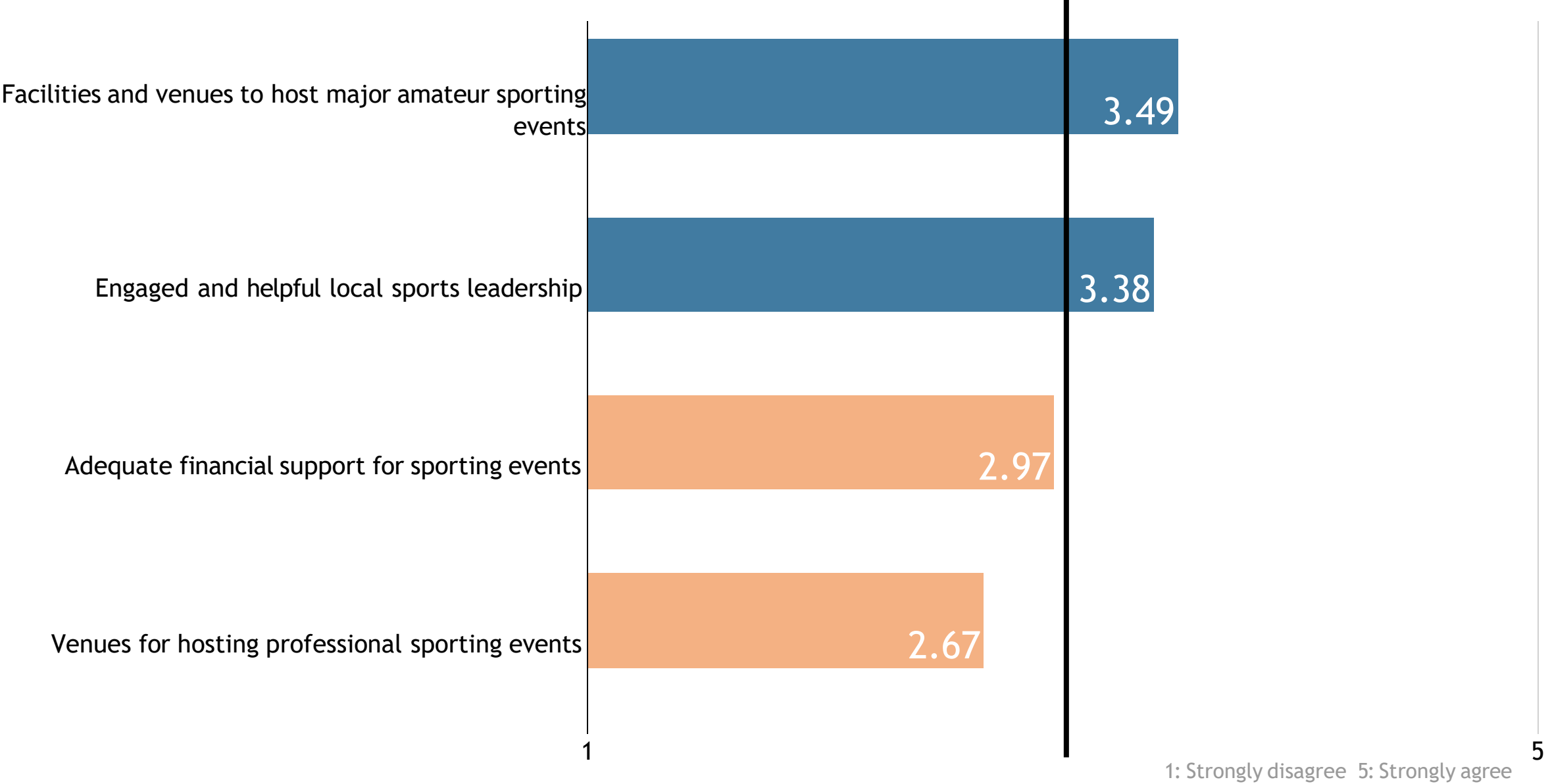


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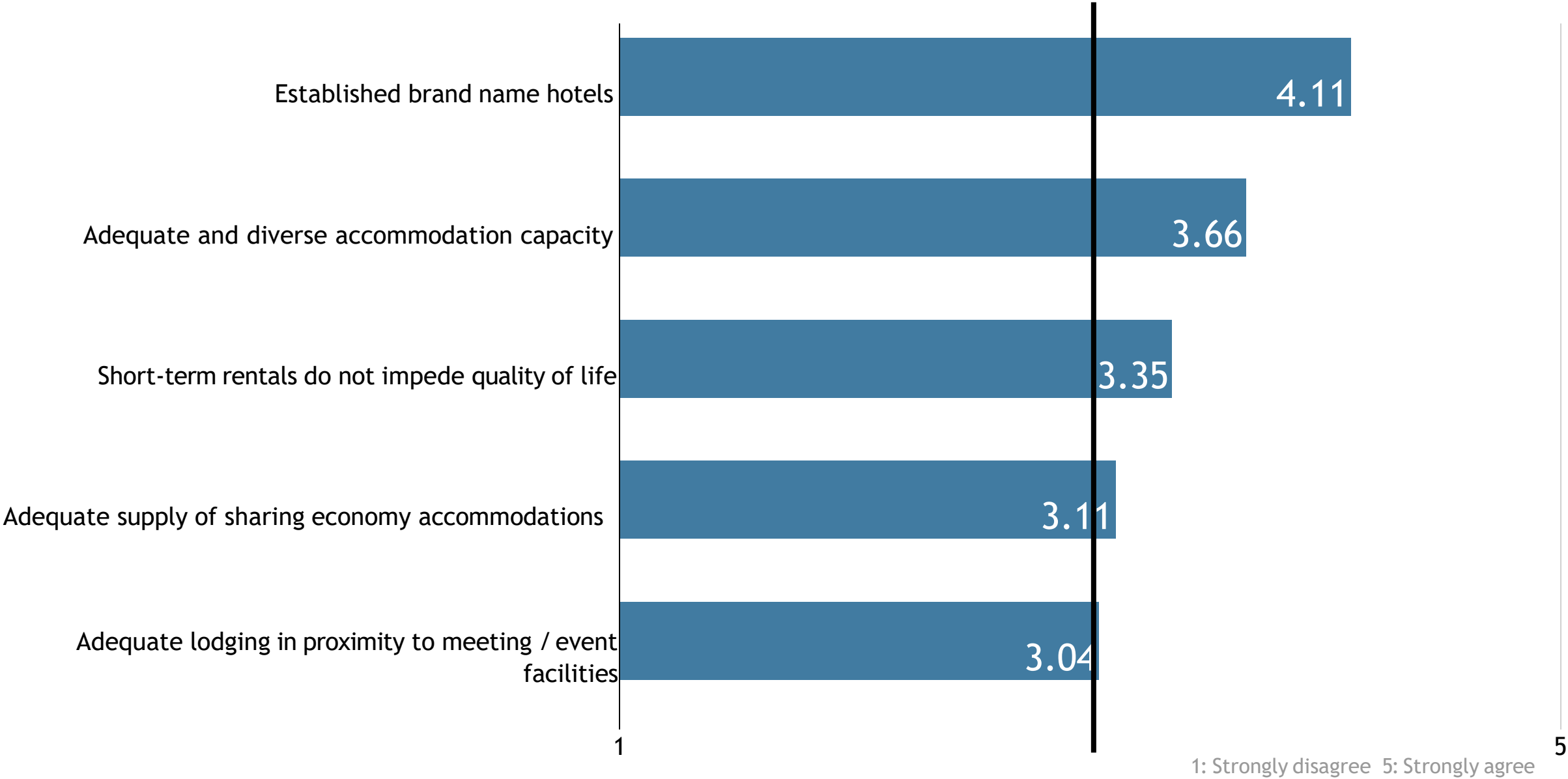


1: Strongly disagree 5: Strongly agree

Sporting Events

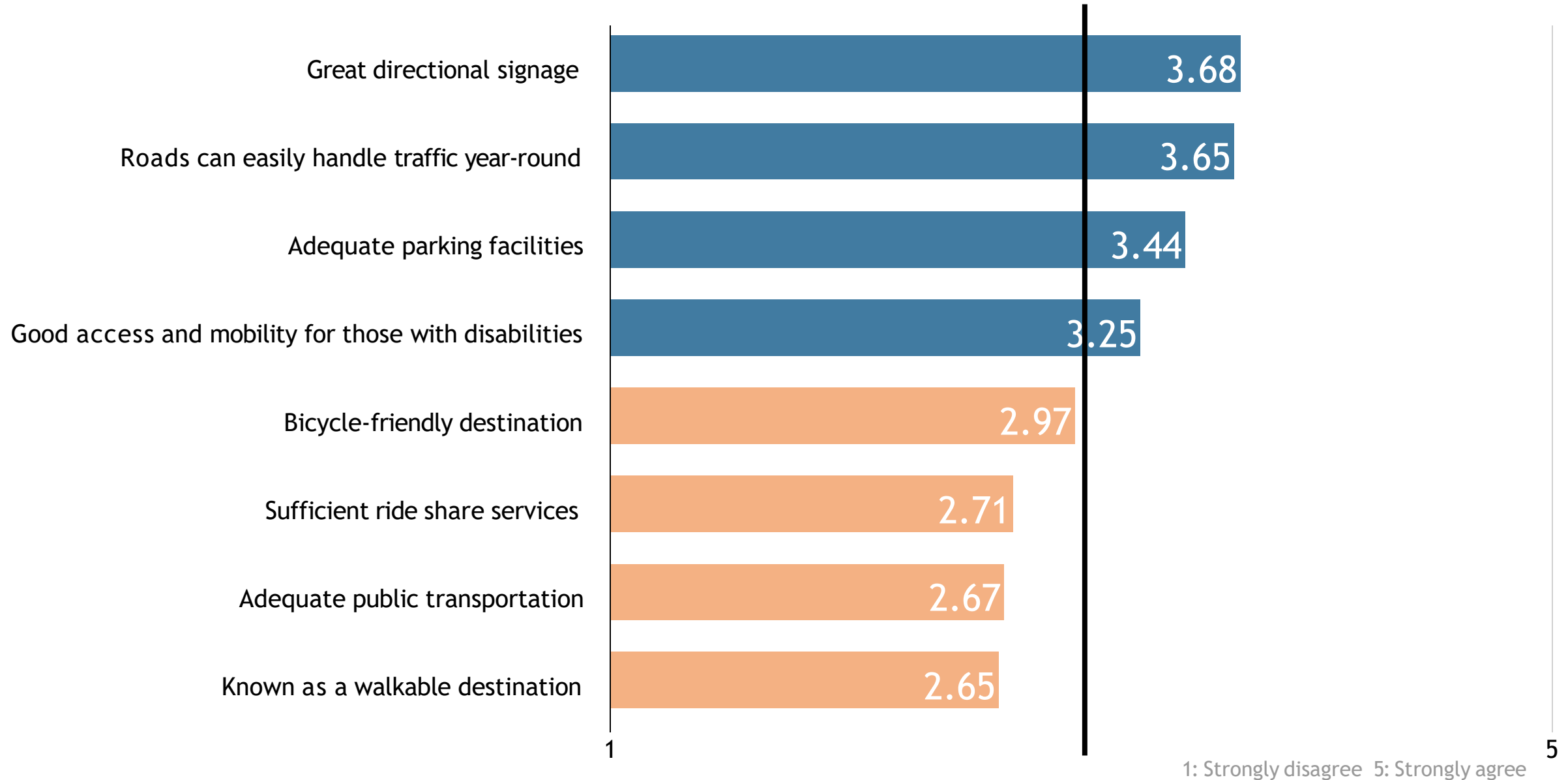


1: Strongly disagree 5: Strongly agree

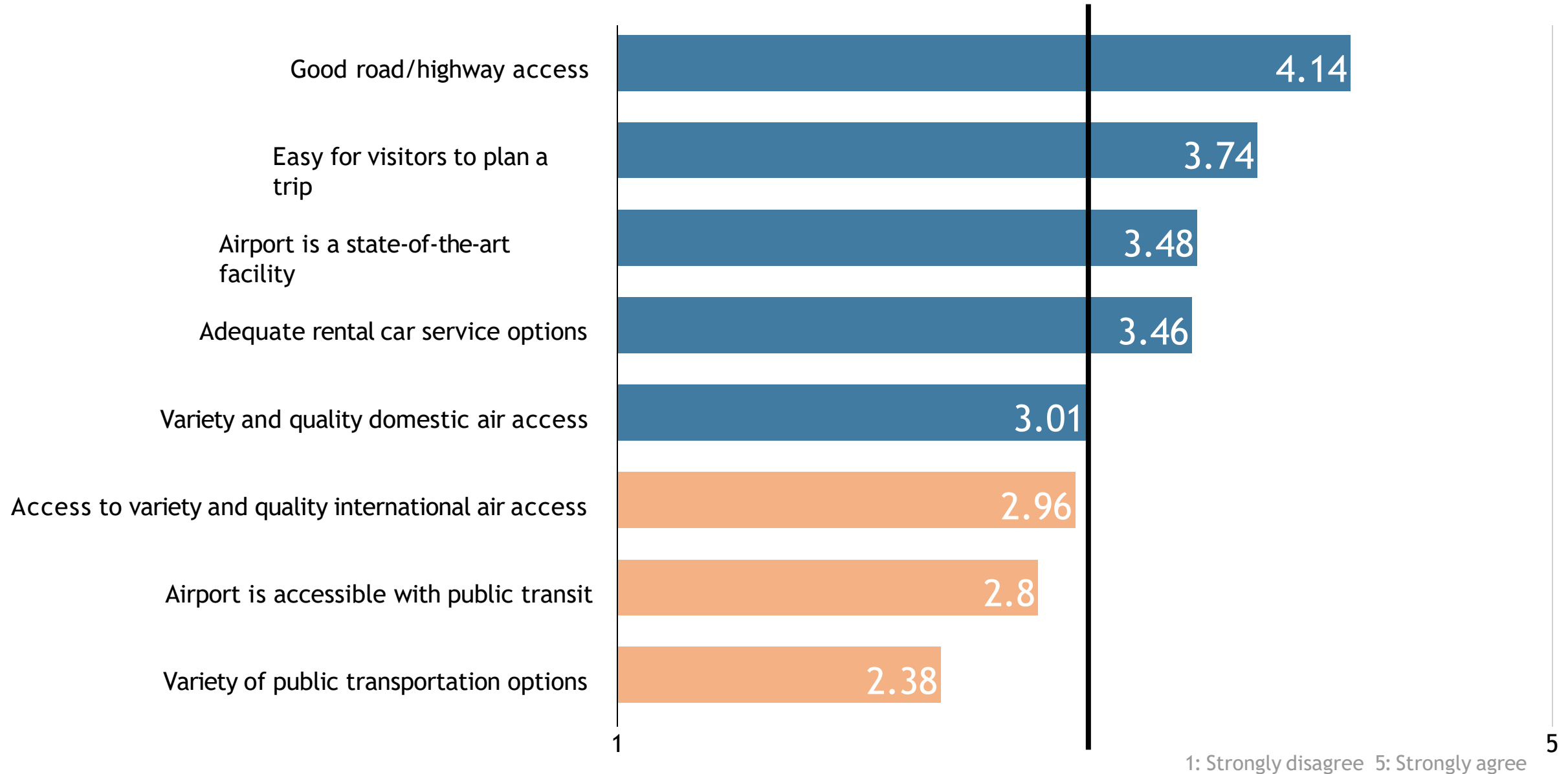


1: Strongly disagree 5: Strongly agree

Local Mobility & Access

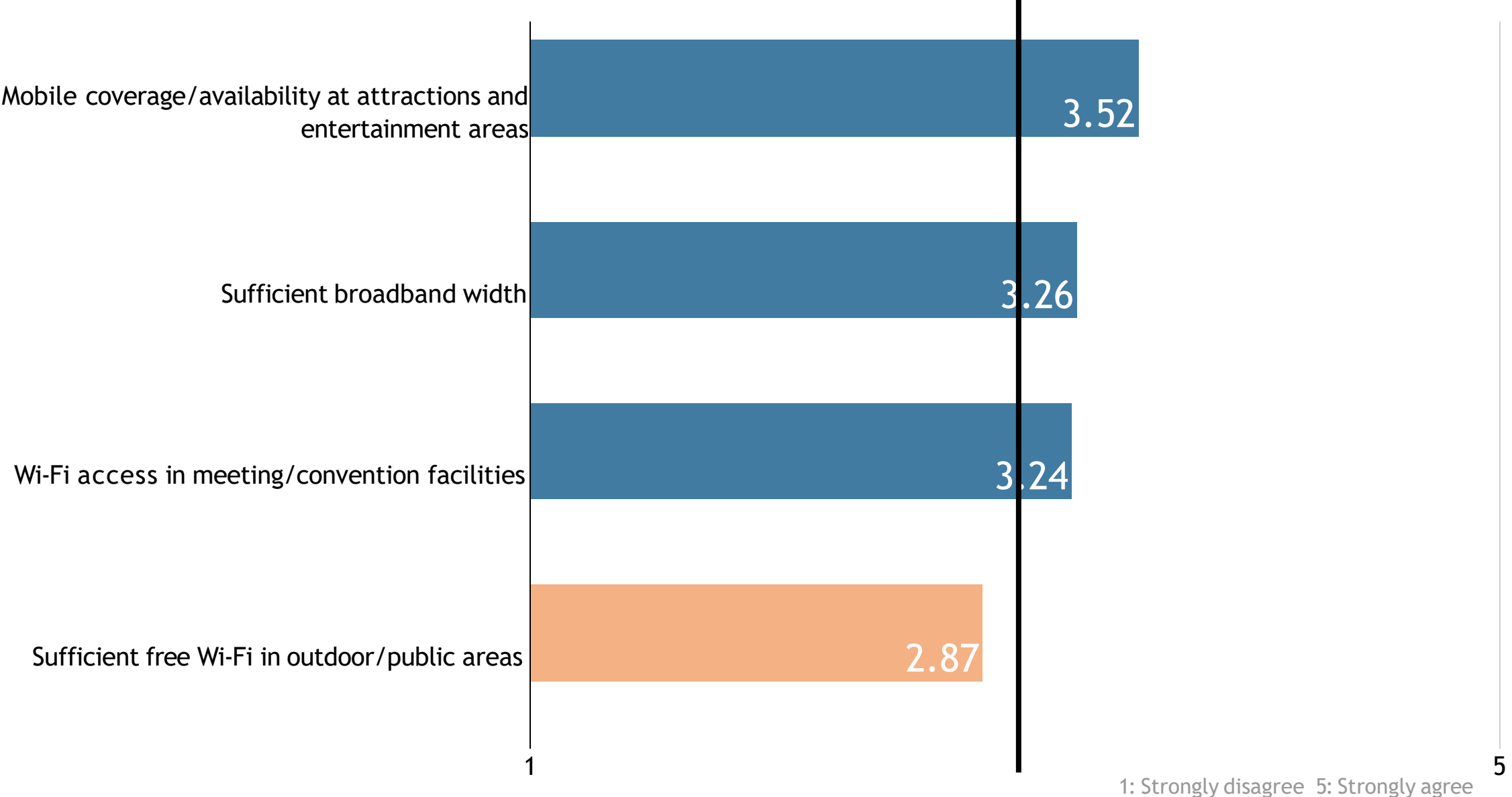


1: Strongly disagree 5: Strongly agree

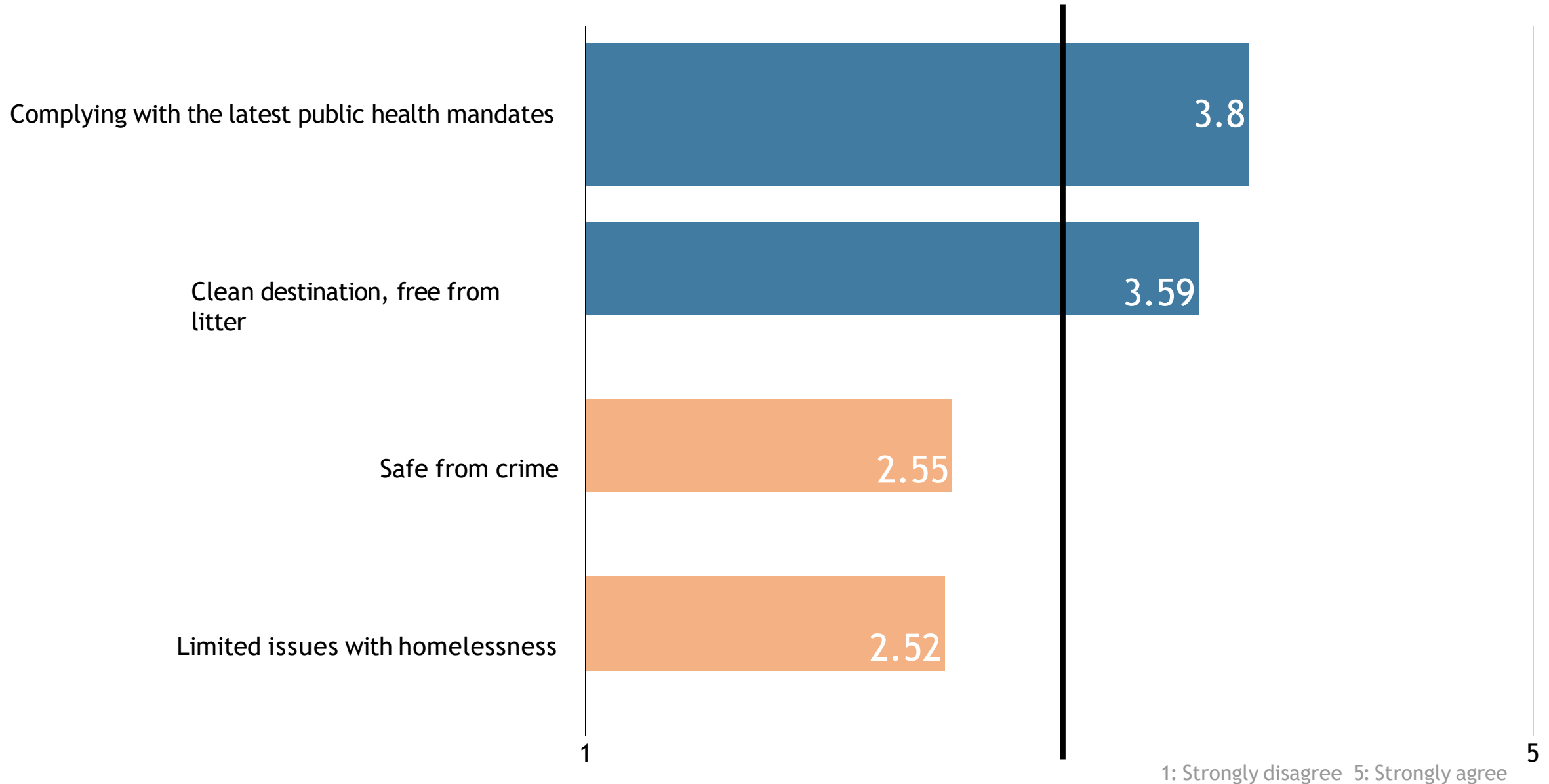


1: Strongly disagree 5: Strongly agree

Communication Infrastructure



1: Strongly disagree 5: Strongly agree



Destination Strength: Highest & Lowest Variable Scores

Highest-scored Variables

	Variable	Performance ▾
1.	Arts, Culture & Heritage	3.97
2.	Outdoor Recreation	3.82
3.	Accommodation	3.50
4.	Attractions & Experiences	3.48
5.	Events & Festivals	3.31

Lowest-scored Variables

	Variable	Performance ▲
1.	Health & Safety	3.11
2.	Sporting Events	3.13
3.	Local Mobility & Access	3.15
4.	Conventions & Meetings	3.15
5.	Dining, Shopping & Entertainment	3.17

Highest-scored Statements

	Statement	Performance ▾
1.	Wide diversity of accessible hiking and biking trails	4.44
2.	High-quality outdoor recreation experiences	4.31
3.	Unique historical attractions	4.23
4.	Assortment of authentic and unique attractions	4.17
5.	Good road/highway access	4.14

Lowest-scored Statements

	Statement	Performance ▲
1.	Variety of public transportation options	2.38
2.	Limited issues with homelessness	2.52
3.	Diverse and high-quality shopping opportunities	2.54
4.	Safe from crime	2.55
5.	Known as a walkable destination	2.65

Community Alignment: Highest & Lowest Statement Scores

Highest-scored Statements

	Statement	Performance ▼
1.	DMO and tourism industry play a critical role in long-term economic development	4.46
2.	Supportive industry leaders and stakeholders	4.29
3.	DMO has good relationship with economic development agencies	4.28
4.	Broader economic development strategies consider the visitor economy	4.11
5.	DMO programs are aligned with local values	4.07

Lowest-scored Statements

	Statement	Performance ▲
1.	Adequate affordable housing for workers	2.32
2.	Affordable childcare options for workers	2.43
3.	Adequate workforce for frontline hospitality jobs	2.45
4.	Adequate workforce for management jobs	2.55
5.	Adequate customer service training programs	2.60

- Destination is in the Explorers quadrant with below average scores for alignment and below average scores for strength.
- Different stakeholder groups have different perceptions of Great Falls.
- There are several opportunities for improvement in Great Falls as per the lowest rated statements shown:

Opportunities for Improvement

Destination Strength

	Statement	Performance ▲
1.	Variety of public transportation options	2.38
2.	Limited issues with homelessness	2.52
3.	Diverse and high-quality shopping opportunities	2.54
4.	Safe from crime	2.55
5.	Known as a walkable destination	2.65

Destination Alignment

	Statement	Performance ▲
1.	Adequate affordable housing for workers	2.32
2.	Affordable childcare options for workers	2.43
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Destination NEXT 2.0 Assessment – Great Falls Montana Tourism

Raw Open-ended Questions

1. Are there certain issues that Great Falls Montana Tourism should specifically address?

- Affordable housing for service sector employees. Helping business promote rental opportunities for bicycles, paddleboards, kayaks.
- Anything we can do to enhance our image would be great. Great falls is much better than most folks think. For gods' sake, we have a river running thru our community! :)
- Convention/event space
- Conventions and improvement of the Montana State Fair. Improvement of the attractions we do have. We need major university here or any major technology industry in GTF.
- Conventions and improvement of the Montana State Fair. Improvement of the attractions we do have. We need major university here or any major technology industry in GTF.
- Downtown 'Zombie Heard'
- Drugs and homeless. It is well known we have big problems here with them. I have heard people call us ghetto falls.
- Facilities for sporting and entertainment... the one facility we have is not modern or accommodating for large events. The State Fair could be so much better. Flying into and out of Great Falls is certainly not cheap and doesn't offer a lot of options. (maybe the cart before the horse... got to have reasons to come and go... the demand may drive better prices)
- Festivals
- Financial advantages to the community
- Getting frontline hospitality, gas station and restaurant workers to believe in and are knowledgeable about attractions and events.
- Great Falls seems to be a drive through town (10th Avenue South is one of the busiest stretches of roadway in MT) and we need visitors to exit 10th Avenue for downtown, the River's Edge Trail, our world class museums, etc.
- Have ability to calculate the impact (per person) of the number of visitors on the local economy for an event.
- Hotelier and Hotel staff training.
- I believe we need to address our youth; give them a voice. We tend to cater to adults, but what will draw the youth to Great Falls?

Destination NEXT 2.0 Assessment – Great Falls Montana Tourism

Raw Open-ended Questions

1. Are there certain issues that Great Falls Montana Tourism should specifically address?

- I don't think the flippant "dam town" campaign is relevant nor competitive on the national scene. A tourism campaign needs to be experiential and relatable to visitors shopping for the next emotional and memory-making experience.
- Large events center.
- local pride of place
- Marketing outside of Montana!!
- Media coverage and affordable events
- Multi use sports and convention center.
- Racism in GF
- Shopping Centers or lack of shopping
- skiing activities - both cross country and downhill
- The central and eastern part of the state struggle to attract tourism compared to the western part of the state. State government does not distribute resources equally or proportionate to need in MT.
- The look of our community is dated and old in certain areas (even certain part of 10th Ave South that many visitors would drive down). Thank you!
- This may be out of your control, but Great Falls is known for casinos. Not the best thing to be known for. Is there a way to influence signage so it's not as "in your face" when driving our main streets? Just a thought. We can't change the view visitors have of Great Falls if the large number of casinos are the one item they remember when they leave.
- Tighter alignment with Chamber and GFDA about events coming so business owners can support. Nothing like a closed specialty shop during a large event weekend. Ongoing event and tourism training to hospitality staff.
- We don't have a premier restaurant. Every restaurant in town is in need of help whether its staff or updating their facilities.
- We love the videos about upcoming events.... those are great!
- Why it costs so much more money to fly out of GTF than our sister cities. So many people travel to a nearby City to fly out of vs. using the GF Airport.
- Why the city government chose to shut down the multi-use facility that we so desperately need.
- Work more closely with organizations to make sure we do not overbook the hotel room availability- ex- FFA & Rural Water User both had large block of rooms over same date in 2023

1. Are there certain issues that Great Falls Montana Tourism should specifically address?

- Work more closely with organizations to make sure we do not overbook the hotel room availability- ex- FFA & Rural Water User both had large block of rooms over same date in 2023.
- Workforce including housing and childcare.

Destination NEXT 2.0 Assessment – Great Falls Montana Tourism

Raw Open-ended Questions

2. What one thing could Great Falls Montana Tourism do to become a better visitor destination?

- "Have more ""attractions"".
- "Leverage the benefits of the Missouri River.
- "WE are the CENTER of the State, if we had better facilities, it would make sense for us to host more events. Equal travel for the STATE OF MT. An Event Center like the Billings Metra. A nice new Hotel Event Center.
- A correctly sized arena for events.
- Be more welcoming.
- Beautify the City's entrances - both public and private properties.
- Better Airline connection
- Better marketing to the residents so we can encourage visitors to come.
- Better public transportation. More buses on the schedule (so it's not every hour), better public transport to the airport. More taxi type services. Passenger rail service?
- Better restaurants
- Bigger capacity events
- Build a meeting/convention/event center.
- Build an indoor/outdoor event venue.
- Cherish the historic downtown and do not let vagrants, drunks, and vandals ruin the city.
- City beautification: keeping trees trimmed, the streets clean, and road markers painted.
- Citywide Kiosks for visitor information
- Continue cleaning up the riverside and bring in more river access/activities, such as kayak, jet ski and boat rentals.
- Convince some government entities that tourism IS economic development. Work closer with the Museum Consortium. Have better breakfast options in our community. Reduce the number of one-way streets to slow down traffic.
- Coordinate with communities in the region to increase options reachable from Great Falls on day trips.
- Deal with homeless and mental health issues better. Get a handle on the amount of illegal drug activity.
- desperately need a kayak, jet ski, etc. rental place to help tourism take advantage of our river and rivers edge trail.
- Develop conference/events center adjacent to the Fairgrounds in West Bank Landing."
- Do more advertising outside of Montana.

Destination NEXT 2.0 Assessment – Great Falls Montana Tourism

Raw Open-ended Questions

2. What one thing could Great Falls Montana Tourism do to become a better visitor destination?

- Educate the public about how tourism benefits them.
- Education of are residents in this region of how cool we are!!
- Expand local outdoor activities using the river in the summer and parks during the winter. Where the heck is our outdoor skating rinks? Butte, MT has 5 outdoor rinks that are all used. The weather here supports it, even if not for the whole winter. And, what about x-country skiing in the city?
- Exploit the opportunities of "a river runs through it" (the Missouri).
- Gosh - my apologies but I can't think of anything.
- Great Falls in general does a great job. There is a lot of negativities expressed from some of our residents that I feel might cause outsiders to not consider coming here.
- Great Wolf Lodge is a perfect example of what would make Great Falls a better destination. A year-round destination with an indoor/outdoor pool and other activities. Variety of dining, food court, and lodging.
- Have a bigger/newer facility that can host meetings/conventions as well as the hotel guests (a hotel over 300 rooms).
- Have more rental places for outdoor recreation. Showcase how to use the river - where, when, how, etc."
- I believe the city/area gets a bad rap on the weather - it is really much better than what people on the outside believe.
- I travel for work and personal. Getting to and from the airport seems clunky here. I use maps to find things to do when I travel and easy to read community calendar events.
- Improve our image within the state so they are more apt to speak favorably of us.
- Increase the number of larger events that draw people into the region.
- Invest in a facility to host large events/concerts.
- Larger arena for events
- Larger entertainment venue
- market to broader audience - hiking in the plains and mountains. Skiing, river access and activities. Recreation in the area mountains and parks
- More consistency in specialty events and better use of the river.
- More outdoor recreation, biking, and collaboration with local businesses.

Raw Open-ended Questions

2. What one thing could Great Falls Montana Tourism do to become a better visitor destination?

- More shopping/better restaurants that are local, not chains. A unique experience.
- More things to do to attract visitors, better shopping, and dining, address the homeless issues in our downtown area, force businesses and housing residents to clean up property, capitalize on the local area river to rent paddle boards, kayak, etc. right on the river.
- Multi propose venue arena and outdoor concert venue along the river.
- Must build a large event center.
- Need a destination convention and multipurpose center for year-round guests.
- New dining options or new brewery options
- Offer high-end, short-term camping accommodations CLOSE TO TOWN - Not just "RV parks", but tent/car camping sites. If you are traveling between national parks, there is NO option to "camp" here. Existing campgrounds/RV parks are overbooked and/or now being occupied long-term due to housing shortage.
- Offer more events.
- Only my opinion, but I tend to like towns like Whitefish, Bozeman, Coeur d'Alene, etc. because the of vibrant downtown with ample food and shopping experiences.... we've made some great improvements in recent years but can do so much more....
- Pinpoint marketing of specific events to viable demographic
- Take the politics and "good 'ol boys club" out of the equation.
- They do a fabulous job, and I do think adding that there are great family indoor attractions, such as the Children's Museum of Montana, could increase their impact significantly.
- Utilize the river more.

Destination NEXT 2.0 Assessment – Great Falls Montana Tourism

Raw Open-ended Questions

3. Are there any markets Great Falls Montana Tourism is currently not capitalizing on?

- Again, market outside of Montana.
- Apparently, the Trolley closed down. When visiting other cities, I typically book a tour on a trolley or a bus to get the local stories and interests without having to drive/park/navigate on my own. If we had one that drove to the various dams as well as the historic district and waterfront, I think it would be a draw for visitors.
- Better capitalization on the unique opportunities GTF does have to offer but, remember the overall reason we are in central Montana.
- Greater Montana, Eastern Washington/ Northern Idaho.
- Helena
- I am sure they are trying but I believe with our central location, we could do better with conventions and sporting events. (Always can do better!) :)
- I think more safe water sports, bicycling and walking events could be capitalized. We have great parks - but we don't have a "park culture". In Missoula you can see live performances on their trail near hotels. Kids playing music, etc. We have the venue but not the accepted culture.
- I'm not sure where they spend their money, but I don't see any of it spent in our neighbor wealth cities (Kalispell, Bozeman...)
- Indian Country
- Interest in indigenous culture - build the Native American equivalent of Colonial Williamsburg
- Italian food/restaurants, healthy food shopping such as Natural Grocers or Whole Foods
- Large scale concerts, sporting events and expos that MT Expo Park is not large enough to accommodate.
- Maybe highlighting our nearby small towns? A trail from GF to Helena on the railroad would be perfect - but I have my doubts that will happen!
- Mountain bike riders, kayakers. Local branches, stores regarding actual outfitting, fishing tours etc. In other words, more packaged delivery of assets.
- mountain biking
- Native American Culture and local guided excursions
- Non alcoholic fun spaces and events for families. Go carts, horseback riding.
- Our river could be utilized more.
- River Recreation

Destination NEXT 2.0 Assessment – Great Falls Montana Tourism

Raw Open-ended Questions

3. Are there any markets Great Falls Montana Tourism is currently not capitalizing on?

- Shopping Centers and lack of
- Sportsman
- The river is our beauty and entertainment. I am not sure visitors know how they can use it. Better marketing and commerce of being able to use it.
- There are a lot of activities in Great Falls, but I hear over and over that there is nothing to do here. We need publicity!
- There is a high native American population in GF. We could promote and develop native cultural tourism.
- Utilizing the river front for more events and increasing marketing/promotion of activities available in the outdoors using Great Falls as a launch point
- We have an amazing "urban" mountain biking trail system. Capitalize on drive-by traffic. (Particularly Canadians heading to/from Moab.) Mountain bikers aren't just dirtbags... they're riding \$6,000 bikes, driving \$60k sprinter vans and would really like a shower, a pizza, and some beer.
- Year-round events with affordable building rentals and ticketing
- Youth



VISIT
Great Falls
MONTANA

Strategic Planning Session Notes



The project planning team led two days of strategic planning workshops attended by over 25 Great Falls leaders November 6-8 2023. Extensive review of the project research and discussions among the leaders identified the following strategic initiatives to be developed in a strategic plan for Great Falls Tourism and a master plan for the development of Great Falls as a destination.

Strategic Objectives for the Great Falls MT Tourism

1. Marketing and Public Relations
2. Group Business Development
3. Advocacy for the Local Travel Industry
4. Organizational Excellence and Sustainability

Strategic Objectives for the Great Falls Destination

1. Hospitality Industry Workforce & Other Issues
2. The Great Falls Visitor Experience
3. Outdoor Recreation
4. Partnership & Communications