

TRAVEL INDUSTRY GROWTH PLAN  
for Great Falls, Montana  
– 2024 –





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*Great Falls Montana Tourism* is a single entity that includes the work of the Great Falls Convention and Visitors Bureau and the Great Falls Tourism Business Improvement District.

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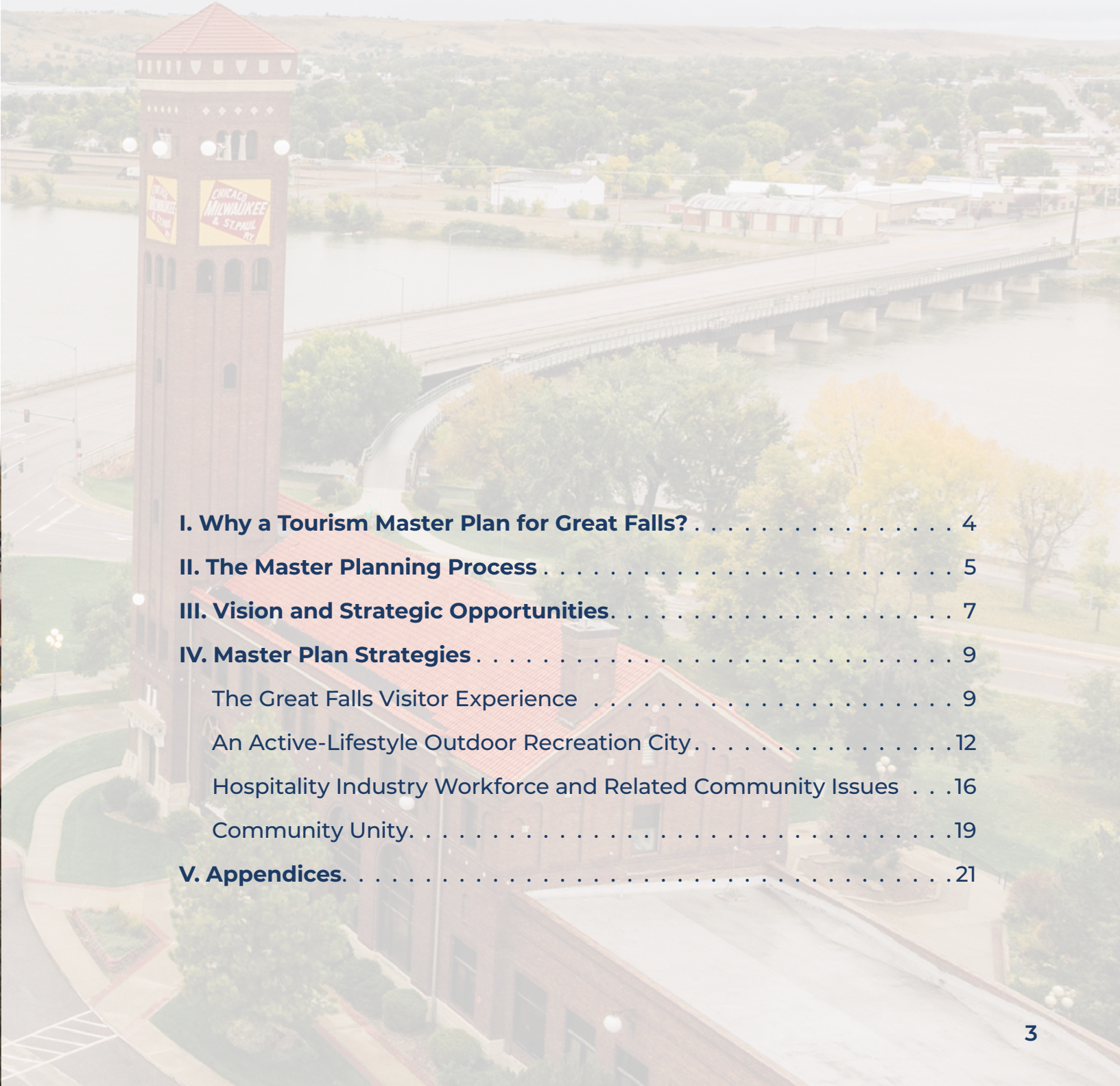
Emily Wolfram, *Montana Performing Arts Consortium*

*This project made possible by the City of Great Falls, with the leadership from Commissioner Hinebauch, Commissioner McKenney, Commissioner Tryon, Commissioner Wolff and Mayor Kelly, utilizing funding from the American Rescue Plan Act (ARPA).*



# TRAVEL INDUSTRY GROWTH PLAN for Great Falls, Montana – 2024 –

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## I. WHY A TOURISM MASTER PLAN FOR GREAT FALLS?

This Tourism Master Plan is a 10-year guide toward an attractive future for Great Falls' travel industry. The plan goes beyond the marketing mission of Great Falls Montana Tourism and addresses broader community issues like attractions, amenities and facilities.

While this is a tourism master plan, the plan recognizes that visitor satisfaction is intricately linked to resident quality of life and community livability. These efforts all work together – the amenities that attract visitors are the same that provide quality of life for residents. By making the community a better place to visit, Great Falls is making itself a better place to live and work.

### GOALS OF THIS TOURISM MASTER PLAN INCLUDE THE FOLLOWING:

- Agreement on major goals and strategies to benefit visitors and residents,
- Application of new market and visitor research,
  - Coordination of efforts by business, civic and government organizations,
  - Reduced duplication of effort,
  - Accountability for progress on the plan and
    - Inspiration for additional community improvements.

## II. THE MASTER PLANNING PROCESS

Great Falls Montana Tourism (GFMT) engaged Rudloff Solutions and Young Strategies (the consulting team) in early 2023 to conduct comprehensive market research on the Great Falls travel industry and develop a Great Falls Tourism Master Plan.

Great Falls Montana Tourism invited approximately 60 hospitality and community leaders to provide input and feedback to the research and planning process. These community leaders participated in four public meetings with the consulting team in May and November 2023 and January 2024. Participants represented the following groups:

Great Falls Montana Tourism	Attractions	Retailers
Restaurants and Bars	Lodging & Meeting Facilities	Educational Institutions
Cultural Organizations	City and County government	Civic Clubs
Economic Development Partners	Interested Citizens	

The planning effort was divided into two phases.

### PHASE 1: RESEARCH

The consulting team worked with GFMT to perform the Phase 1 research steps from May-October 2023.

**LITERATURE REVIEW:** Reviewed 23 plans, research studies and marketing efforts related to Great Falls Montana Tourism, the local travel industry, the local economy and current economic development efforts (**Appendix A**).

**STAKEHOLDER INTERVIEWS:** Interviewed 31 travel industry, business and community leaders about travel industry issues and opportunities affecting Great Falls (**Appendix B**).

**LODGING MARKET ANALYSIS:** Procured detailed lodging occupancy and activity data from Smith Travel Research (STR) for the hotels participating in the STR sample (85% of rooms in Great Falls).

**SURVEY OF LODGING MANAGERS:** Surveyed Great Falls hotel/motel properties on their market mix, occupancy rates and other key lodging metrics.

**GEOLOCATION DATA:** Obtained data from two geolocation sources to provide visitor profile and activity information. Geolocation data uses the IP address of electronic devices, such as cell phones or tablets, to determine their location and movement (ex: where they visited, duration of the visit, etc.).

**VISITOR SURVEY:** Surveyed 1,541 Great Falls visitors through an online questionnaire about their trip planning and visits to Great Falls.

**MEETING / SPORTS RESEARCH:** Surveyed 71 meeting planners and 11 sports planners about their views of Great Falls as a meetings / sports destination, as well as details about the events they hold in Great Falls.



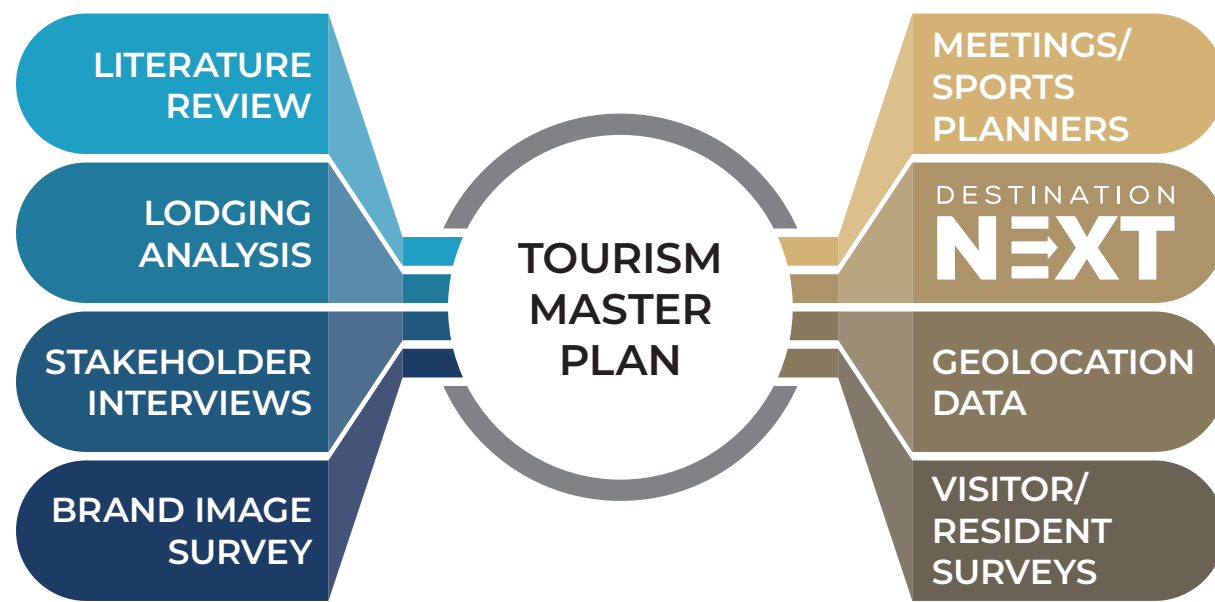
**ATTRACTION, MEETING FACILITY AND OVERALL COMMUNITY ASSESSMENT:** Toured major attractions, meeting facilities, lodging properties, downtown and various shopping and dining options.

**RESIDENT SURVEY:** Received responses from 344 Great Falls residents, including Malmstrom Air Force Base service members, on their views about Great Falls attractions, amenities and image.

**BRAND IMAGE AND AWARENESS:** Surveyed 485 potential Great Falls visitors in target markets about their awareness and brand image of Great Falls.

**DESTINATIONNEXT:** Performed a comprehensive self-assessment of Great Falls using DestinationNEXT. This online diagnostic tool allows local leaders to assess 24 variables related to destination strength and community alignment, providing priorities for strategic planning.

The consulting team presented the Phase 1 Research results to Great Falls Montana Tourism and community leaders on November 6, 2023 in Great Falls. GFMT staff and community leaders provided feedback on the data. The full summary of all the market research is available in a separate document — *Great Falls Montana Comprehensive Travel Market Research, Nov. 2023.*



**PHASE 2: MASTER PLAN DEVELOPMENT**

The consulting team led a strategic planning session with Great Falls Montana Tourism board members and community leaders on November 8, 2023. The consulting team led discussions on the major strengths, weaknesses and opportunities for the community to address to improve the area’s travel industry.

Using the extensive market research collected and Great Falls community input, the consulting team created a draft data-driven Master Plan.

Great Falls Montana Tourism reviewed and provided input and revisions to the plan in early January 2024. The consulting team publicly presented the final version of this Tourism Master Plan to the Great Falls community on January 19, 2024.

In addition, the consulting team produced an on organizational strategic plan for Great Falls Montana Tourism that is in a separate document from this Master Plan.

**III. VISION AND STRATEGIC OPPORTUNITIES**

**VISION FOR THE GREAT FALLS TRAVEL INDUSTRY**

Great Falls is a unique riverfront destination unlike any other Montana city and is known for its waterfalls, outdoor recreation and cultural attractions.

**GREAT FALLS STRATEGIC OPPORTUNITIES**

			
<b>OBJECTIVE 1</b> The Great Falls Visitor Experience	<b>OBJECTIVE 2</b> An Active- Lifestyle Outdoor Recreation City	<b>OBJECTIVE 3</b> Hospitality Industry Workforce and Related Community Issues	<b>OBJECTIVE 4</b> Community Unity

**LEGEND:**

- GFMT:** Great Falls Montana Tourism
- GFDA:** Great Falls Development Alliance
- MAFB:** Malmstrom Air Force Base
- ECON DEV PARTNERS:** GFMT, GFDA, Great Falls Area Chamber of Commerce, Downtown Great Falls, Great Falls International Airport. *If one of the Econ Dev Partners is named specifically, it is expected to play a larger role than the others.*
- HOSPITALITY STAKEHOLDERS:** Hoteliers, Attractions, Restaurants

**TIME FRAMES:**

Short 1-2 years, Medium 3-5, Long 6-10 years







## IV. MASTER PLAN STRATEGIES

### 1. THE GREAT FALLS VISITOR EXPERIENCE



Great Falls has a solid base of attractions and amenities that serve both visitors and residents. Improving these existing amenities and adding new ones will help the community enjoy greater benefits of the travel industry (employment, spending, taxes generated). In addition, the community can work to improve the accessibility of its experiences to visitors, helping them find and use the amenities that make Great Falls so unique.

**a. Support the development of new or improved attractions, amenities and businesses throughout the community, with a special emphasis along the Missouri River and in downtown.**

**ONGOING**

**LEAD:** GFDA, PRIVATE BUSINESSES, DOWNTOWN GREAT FALLS

**SUPPORT:** GFMT, CHAMBER, CITY, COUNTY

Visitors and residents alike benefit from expanded activities and entertainment options.

- Support private entrepreneurial efforts to develop new amenities and attractions. **(ONGOING)**
- Continue to use financing districts and other innovative tools to encourage business, attraction and amenity development. **(ONGOING)**
- Encourage GFDA to include the hospitality industry among its target industries for recruitment and development. **(ONGOING)**
- Champion and support development of unique dining, lodging and boating options along the Missouri River.
- Celebrate and publicize downtown successes — new businesses, new events, infrastructure improvements, etc. **(ONGOING)**
- Encourage development of evening entertainment options for residents, visitors and groups (downtown and communitywide). Promote evening options heavily to residents and visitors. **(ONGOING)**
- Develop a long-term maintenance plan, with appropriate funding, for the city’s new wayfinding system. **(SHORT MEDIUM TERMS)**
- Investigate a group transportation option (bus, trolley) for sports tournaments, meetings, events and other community needs. **(MEDIUM LONG TERMS)**

**b. Support continued expansion of air service at the Great Falls International Airport.**

**ONGOING**

**LEAD:** GREAT FALLS INTERNATIONAL AIRPORT

**SUPPORT:** CITY, COUNTY, STATE, MAFB, CHAMBER, GFMT, MONTANA AIR NATIONAL GUARD

The airport is a critical asset for the regional travel industry and the local economy. It is a gateway airport for Montana and two major National Parks and boasts flights on four major carriers to six hub airports in as many states. Expanding current airport usage will lead to expanded air service.

- Promote Great Falls as the best gateway to Glacier and Yellowstone National Parks. Include a Great Falls overnight stay as part of all promotions. **(ONGOING)**
- Continue to support community fundraising efforts to attract/support air service. **(ONGOING)**
- Support expanded ultra-low-cost (“ULC”) service beyond Las Vegas and Phoenix. ULC service lowers the price barrier, thus expanding overall travel to markets like Canada. **(ONGOING)**
- Coordinate limited marketing campaigns between GFMT and the Great Falls International Airport to support service on struggling or likely-to-expand routes. **(ONGOING)**



c. Continue developing, expanding and growing Great Falls' arts and cultural experiences.

<b>ONGOING</b>	<b>LEAD:</b> GREAT FALLS MUSEUM CONSORTIUM, LITTLE SHELL TRIBE, LEWIS & CLARK INTERPRETIVE CENTER	<b>SUPPORT:</b> CITY, COUNTY, STATE, ECON DEV PARTNERS
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Great Falls is a cultural arts community and destination. The culture, heritage and arts experiences enhance the quality of life for residents and the experience for visitors. The long-term appeal of these activities is dependent on constant re-investment and revitalization

- Promote and develop the wealth of art, history and culture displayed at Great Falls museums. **(ONGOING)**
- Create additional activities or performances at the Lewis and Clark Interpretive Center that capture the excitement and romance of the Lewis and Clark story, while extending visitor stays into the evening. **(MEDIUM LONG TERMS)**
- Develop the Little Shell Tribe's Pow Wow project as a critical element to the area's cultural heritage. **(SHORT MEDIUM TERMS)**
- Support efforts to secure resources and create projects that enhance the area's cultural assets. **(ONGOING)**
- Create a Great Falls Arts Fund that can be used for public arts efforts (murals, bands in the park, etc.). **(MEDIUM LONG TERMS)**

d. Support ExpoPark.

<b>ONGOING</b>	<b>LEAD:</b> COUNTY, EXPO PARK, GFMT	<b>SUPPORT:</b> ECON DEV AGENCIES
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Visitors and residents alike benefit from expanded activities and entertainment options at ExpoPark.

- Support ExpoPark's efforts to host events and meetings. **(ONGOING)**
- Encourage collaborations between ExpoPark and GFMT on bidding on events and meetings, publicizing events and future development plans. **(SHORT TERM)**



e. Develop public and private facilities that can host groups in Great Falls.

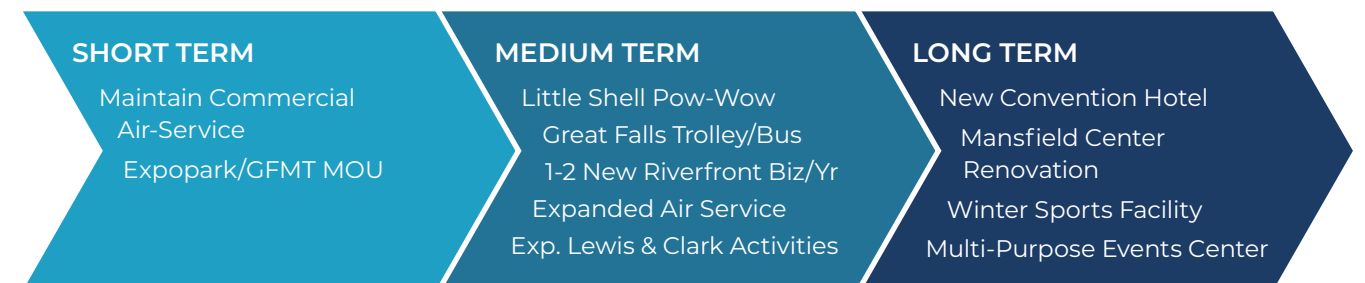
<b>ONGOING</b>	<b>LEAD:</b> CITY, SCHOOL DISTRICT	<b>SUPPORT:</b> GFMT, ECON DEV PARTNERS
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Great Falls is a fantastic destination for individual travelers. The improvement, expansion and development of group facilities is required to drive growth in group visitation from the team sports, meetings and events markets. Any facilities developed should meet the needs of residents while providing increased destination appeal for group travelers.

- Support targeted development of new sports facilities and the enhancement of existing ones to build sports capacity in the winter when the community needs business (ex: indoor winter sports). **(ONGOING)**
- Perform a competitiveness analysis of the Mansfield Theater / Civic Center Complex. Pursue the recommendations with the highest return-on-investment, as feasible. **(SHORT MEDIUM LONG TERMS)**
- Consider development of a large, multipurpose meeting event space to host statewide conventions and events ONLY when the location is within walking distance to 300+ hotel rooms and within close proximity to shopping/dining options. **(MEDIUM LONG EXTENDED TERM)**
- Support efforts to develop new camping and lodging options (especially lodging with significant meeting space). **(MEDIUM LONG EXTENDED TERM)**
- Support private entrepreneurial efforts to develop new group facilities. **(ONGOING)**
- Support the education, medical and other top industries of Great Falls which attract travelers and provides needed community facilities. **(ONGOING)**

MEASURES

- New hospitality businesses along the river (lodging, dining, attractions)
- Bus or trolley transportation option for leisure, sports and meetings attendees
- Establishment of the Little Shell Pow Wow experience
- Lower vacancy rate downtown
- Renovated Mansfield Theater / Civic Center
- Maintain air service to Chicago, Seattle, Las Vegas, Denver, Minneapolis, Salt Lake City, and Phoenix
- Add air service to California and Texas
- Add new low-cost air service
- New or enhanced winter sports facility
- Live music / entertainment 7 nights/week year-round





## 2. AN ACTIVE-LIFESTYLE OUTDOOR RECREATION CITY



Great Falls serves as a basecamp for outdoor recreation in central Montana, as well as a gateway to two of the most amazing national parks in America. In addition, the city itself boasts a wide assortment of outdoor recreation amenities. However, some of the amenities require equipment and guidance that many travelers may not have. To improve the community's outdoor recreation experience, Great Falls can work on enhancing its existing strengths, while also making it easier for visitors to access them.

### a. Maintain and enhance the River's Edge Trail and other existing outdoor recreation attractions.

<b>ONGOING</b>	<b>LEAD:</b> CITY, GFMT	<b>SUPPORT:</b> ECON DEV PARTNERS, OUTDOOR RECREATION GROUPS, HOSPITALITY STAKEHOLDERS
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Great Falls must continue to protect, maintain and build upon its existing outdoor recreation strengths.

- Prioritize maintenance and enhancement of River's Edge Trail, an attraction that personifies the destination and is unmatched in the region. **(ONGOING)**
- Encourage the development and promotion of events and amenities along the River's Edge Trail (community walks or bike rides, parades, festivals, food trucks, photo contests, etc.). **(ONGOING)**

### b. Enhance the experience of visiting the waterfalls.

<b>ONGOING</b>	<b>LEAD:</b> CITY, COUNTY, NORTHWESTERN ENERGY, RIVER'S EDGE TRAIL FOUNDATION	<b>SUPPORT:</b> ECON DEV PARTNERS, OUTDOOR RECREATION GROUPS, HOSPITALITY STAKEHOLDERS
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Protect and enhance the community's chief brand component.

- Develop and implement a comprehensive Waterfalls Development Plan to protect and enhance the experience of visiting the waterfalls. The plan should include all relevant management partners and address all aspects of the waterfalls experience (roads, trails, wayfinding roadway and trail signs, interpretive signs for the falls and historic sites along the river, parking, waterfall viewing areas, tours, waterfall management, partner agreements, etc.). **(ONGOING)**

### c. Encourage responsible use of Great Falls' outdoor recreation resources to continue offering world-class experiences to residents and visitors for years to come.

<b>ONGOING</b>	<b>LEAD:</b> GFMT	<b>SUPPORT:</b> ECON DEV PARTNERS, HOSPITALITY STAKEHOLDERS
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- Promote awareness of conscientious trails, river and outdoor recreation etiquette. Consider using the Montana Office of Tourism's Recreate Responsibly messaging or something similar. **(ONGOING)**
- Market the area's outdoor recreation options wisely with an eye toward economic and environmental sustainability. Pay attention to seasonality and the carrying capacity of specific outdoor recreation assets. **(ONGOING)**





d. Develop and promote outdoor recreation businesses (rentals / retailers / outfitters) to enable visitors and residents to easily access outdoor recreation experiences.

**ONGOING**

**LEAD:** GFDA, CITY, GFMT, CHAMBER

**SUPPORT:** OUTDOOR RECREATION GROUPS

**Making Great Falls' outdoor recreation options easier to access will increase visitor and resident satisfaction and extend visitor stays and spending.**

- Support private entrepreneurial efforts to develop needed new outdoor recreation businesses. **(ONGOING)**
- Support and promote Great Falls' Parks and Recreation's new water recreation efforts on the West Bank of the river. **(SHORT MEDIUM TERMS)**
- Promote existing outdoor recreation suppliers (hiking, kayaking, boat tours, fishing, hunting) to visitors and residents using the publicity tools of economic development partners. **(ONGOING)**
- Encourage existing water adventure outfitters operating south of Great Falls to extend their activities closer to the city, if feasible. **(MEDIUM LONG TERMS)**
- Consider innovative partnerships to aggregate resources to provide new services — such as equipment rentals — that aren't currently provided by the private sector. Possibilities include educational institutions, Malmstrom Air Force Base, sports user groups and private businesses. **(MEDIUM LONG TERMS)**
- Explore the creation of an outdoor recreation grant program to assist existing or new providers. **(MEDIUM LONG TERMS)**
- Investigate an amphibious "duck boat" option that can provide tours both on land and in the river. Such an attraction could provide family-friendly access to the river, along with storytelling about the community. **(MEDIUM LONG TERMS)**

## MEASURES

- Annual festivals / events on the River's Edge Trail
- Bikes / scooters / kayaks available at West Bank or elsewhere
- New retail supplier of outdoor recreation equipment for sale or rent
- New kayak opportunities closer to south Great Falls
- Great Falls recognized as a responsible outdoor recreation / waterfront city

### SHORT TERM

West Bank Park and Rec program operational

### MEDIUM TERM

New River's Edge Trail festival or event  
New water outfitter operational

### LONG TERM

Outdoor recreation retailer operating along the River's Edge Trail







### 3. HOSPITALITY INDUSTRY WORKFORCE AND RELATED COMMUNITY ISSUES



Workforce issues are significantly hindering the Great Falls hospitality industry, as they are in cities throughout the United States. Marketing to new and returning customers is counterproductive if the experience they encounter in Great Falls is subpar. Addressing these workforce shortages successfully will provide Great Falls with a competitive edge over other destinations.

#### a. Support efforts to grow and improve the local hospitality workforce.

<b>ONGOING</b>	<b>LEAD:</b> CHAMBER OF COMMERCE	<b>SUPPORT:</b> GFDA, GFMT, EDUCATION PARTNERS, HOSPITALITY STAKEHOLDERS
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Simply put, the hospitality industry cannot function without an adequate number of workers.

- Represent the views of the hospitality industry in workforce development efforts in Great Falls and Cascade County. **(ONGOING)**
- Share information about the Great Falls Chamber of Commerce’s workforce efforts to hospitality industry partners. Encourage private sector participation. **(SHORT MEDIUM TERMS)**
- Explore a Military Spouse/Partner Program as a source for hospitality workers. **(ONGOING)**
- Assist businesses by hosting/promoting hospitality job fairs and job boards. **(SHORT MEDIUM TERMS)**

#### b. Support hospitality workers by improving access and affordability of childcare, housing and transportation.

<b>ONGOING</b>	<b>LEAD:</b> GFDA	<b>SUPPORT:</b> CHAMBER OF COMMERCE, CITY, COUNTY, GFMT
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These issues hinder workforce participation in hospitality jobs. Workers are more likely to stay in hospitality jobs when their cost-of-living is affordable and sustainable.

- Coalesce economic development and workforce agencies to prioritize issues and identify solutions. **(ONGOING)**

#### c. Provide customer service and skills training to hospitality industry workers.

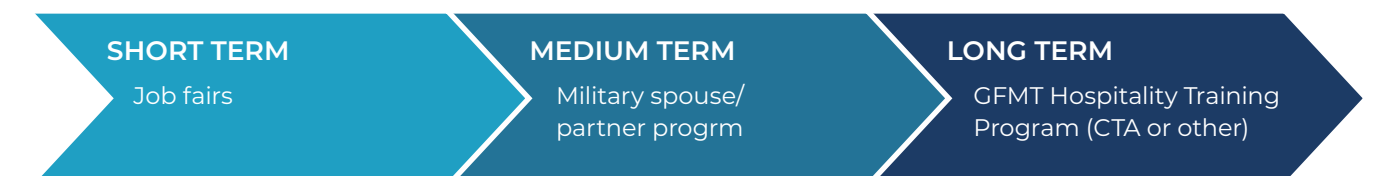
<b>ONGOING</b>	<b>LEAD:</b> GFMT	<b>SUPPORT:</b> HOSPITALITY STAKEHOLDERS, GFDA, CHAMBER OF COMMERCE, EDUCATION PARTNERS
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Research has shown that improved customer services deliver higher visitor spending.

- Develop positive relationships with the MT Workforce Services Division and educational institutions so they promote employment and training opportunities in the hospitality industry. **(ONGOING)**
- Encourage secondary schools to provide hospitality programs such as the National Restaurant Association’s ProStart Culinary Arts program. **(MEDIUM LONG TERMS)**
- Provide hospitality training for area workers (after the workforce shortage improves). **(LONG TERM)**

### MEASURES

- Improved workforce measures – annual survey of hotels, restaurants
- Workers placed – military spouses
- New workforce programs
- Job fairs and job boards







## 4. COMMUNITY UNITY



Despite Great Falls’ impressive attraction base and healthy travel industry, some residents and leaders, both in Great Falls and statewide, feel that the city doesn’t measure up to other Montana destinations. This perception is unwarranted based upon the positive reviews of most visitors and residents. Developing community awareness and unity of purpose will catapult Great Falls into the top tier of Montana destinations.

**a. Pursue stronger collaborations and communications among economic development entities and local government.**

<b>ONGOING</b>	<b>LEAD:</b> ECON DEV PARTNERS	<b>SUPPORT:</b> CITY, COUNTY
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This master plan is designed to serve as a road map to facilitate multiple agencies and governments to work toward common goals to grow the impact of travel in Great Falls.

- Convene monthly breakfasts of the economic development CEOs and the City Manager to develop closer relationships, share information, plan joint efforts and pursue common goals. **(ONGOING)**
- Investigate new collaborations that reduce redundancies and better achieve community goals. **(ONGOING)**
- Share progress about this Tourism Master Plan and update it annually. **(ONGOING)**

**b. Promote the community with a new Great Falls tourism brand that celebrates the Missouri River and its waterfalls.**

<b>ONGOING</b>	<b>LEAD:</b> GFMT	<b>SUPPORT:</b> HOSPITALITY STAKEHOLDERS
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Branding research has revealed how important water and the city’s riverfront location is to the Great Falls brand, even to those who have never visited.

- Update the Great Falls brand using a stakeholder input process (as recommended by 2023 brand research). **(SHORT TERM)**
  - Primary brand pillars: waterfalls; the Missouri River; outdoor recreation.
  - Secondary: arts/culture; gateway to Glacier and Yellowstone National Parks.
- Create tools to help hospitality stakeholders and other community organizations to use the brand in their marketing and PR efforts if appropriate. **(SHORT MEDIUM TERMS)**

**c. Celebrate the uniqueness of Great Falls.**

<b>ONGOING</b>	<b>LEAD:</b> GFMT	<b>SUPPORT:</b> ECON DEV PARTNERS, CITY
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Residents are most aware of local challenges and must be reminded of the great assets and benefits offered in their town.

- Place some Great Falls tourism advertising within Great Falls to educate residents about local attractions and amenities, inspiring residents to become local tourism ambassadors. **(ONGOING)**
- Develop strong messaging about the positive impact of the travel industry on Great Falls residents and present this message through the local media, social media, annual reports and civic club presentations. **(ONGOING)**
- Partner with economic development and civic organizations to highlight unique and amazing aspects of the city and surrounding region, both for residents and visitors. **(MEDIUM TERM)**



d. Lobby together with one voice advocating for Great Falls before the MT Legislature, the MT Department of Commerce, the Montana Office of Tourism and other state agencies for grants, promotions and lobbying efforts.

<b>ONGOING</b>	<b>LEAD:</b> CITY, COUNTY	<b>SUPPORT:</b> GFMT, ECON DEV PARTNERS, MONTANA TRAVEL ASSOC
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- Develop prioritized task list of issues and gain local consensus to speak with one voice. **(ONGOING)**
- Schedule Great Falls Day in Helena to promote growth initiatives in Great Falls and lobby state agencies for support. **(ONGOING)**

**MEASURES**

- Monthly breakfast meetings
- New brand developed and used by partners
- Tourism Master Plan updated
- Community awareness efforts
- Statewide recognition as a bustling riverfront community
- Great Falls branded merchandise worn by residents

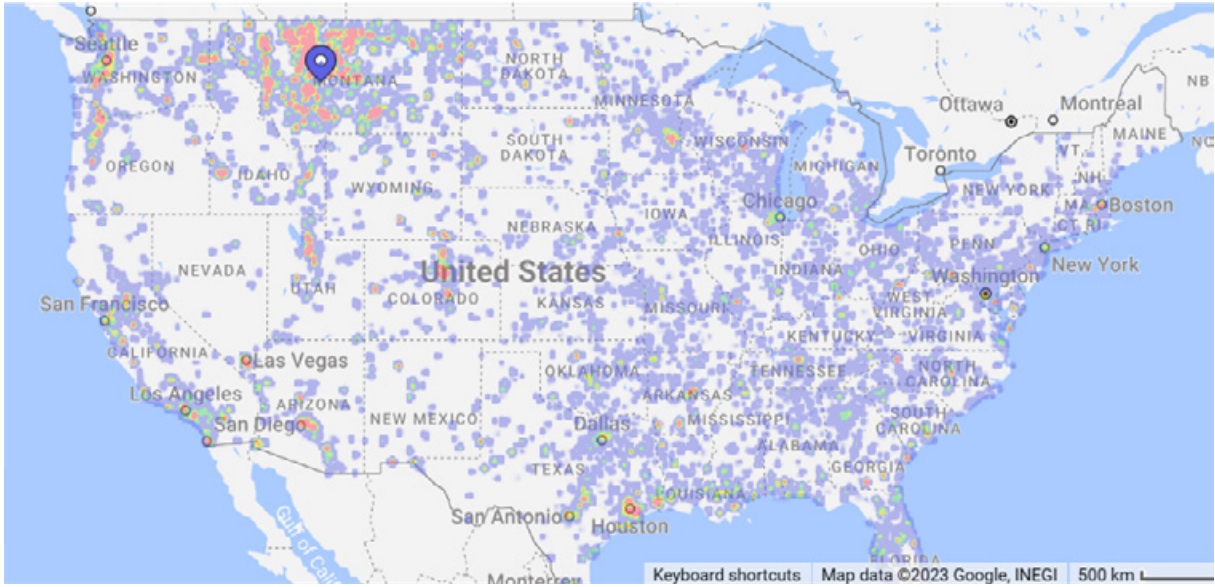


**V. APPENDICES**

**APPENDIX A: RESEARCH HIGHLIGHTS**

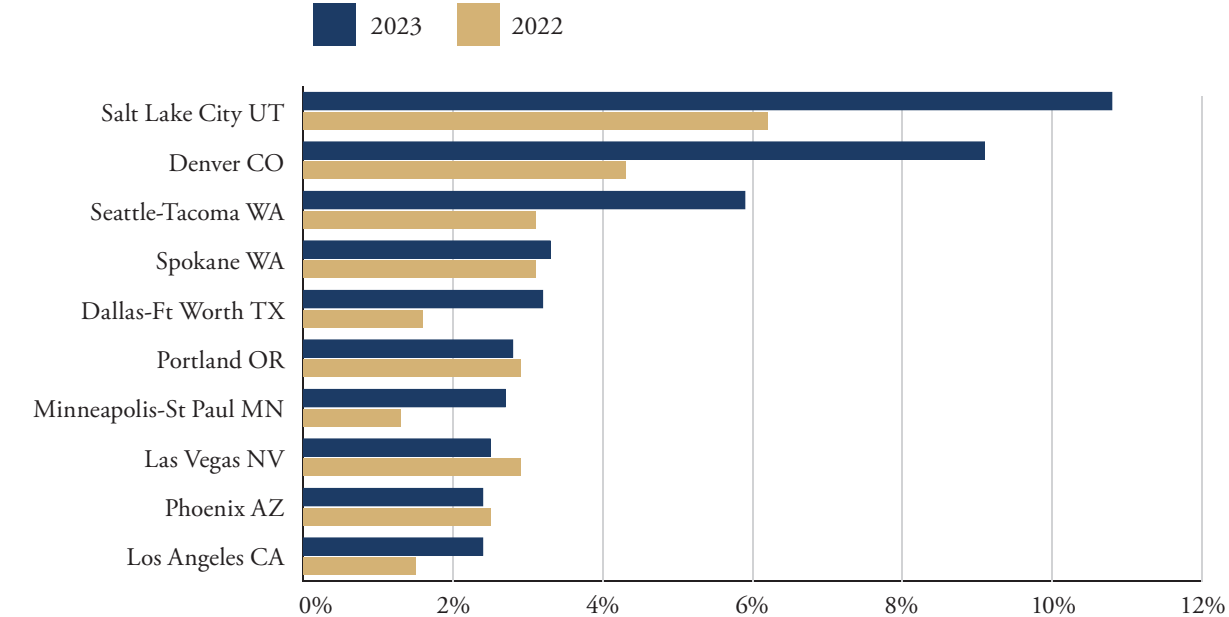
The complete summary of all the market research conducted for this planning process is available in a separate document — *Great Falls Montana Comprehensive Travel Market Research, Nov. 2023.*

**MAP OF 2022 VISITORS TO GREAT FALLS FROM USA LOWER 48 STATES**



Source: Placer.ai

**TOP TEN ORIGIN MARKETS FOR OUT-OF-STATE VISITORS TO GREAT FALLS, 2022-2023**

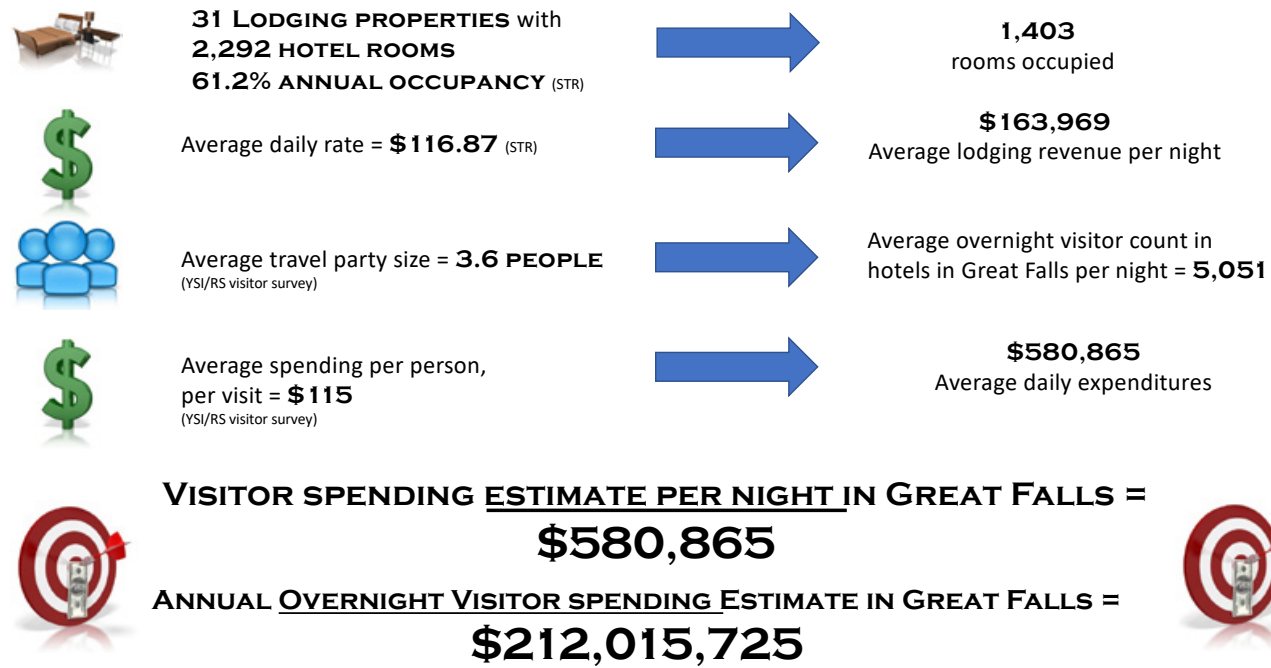


Source: Zartico



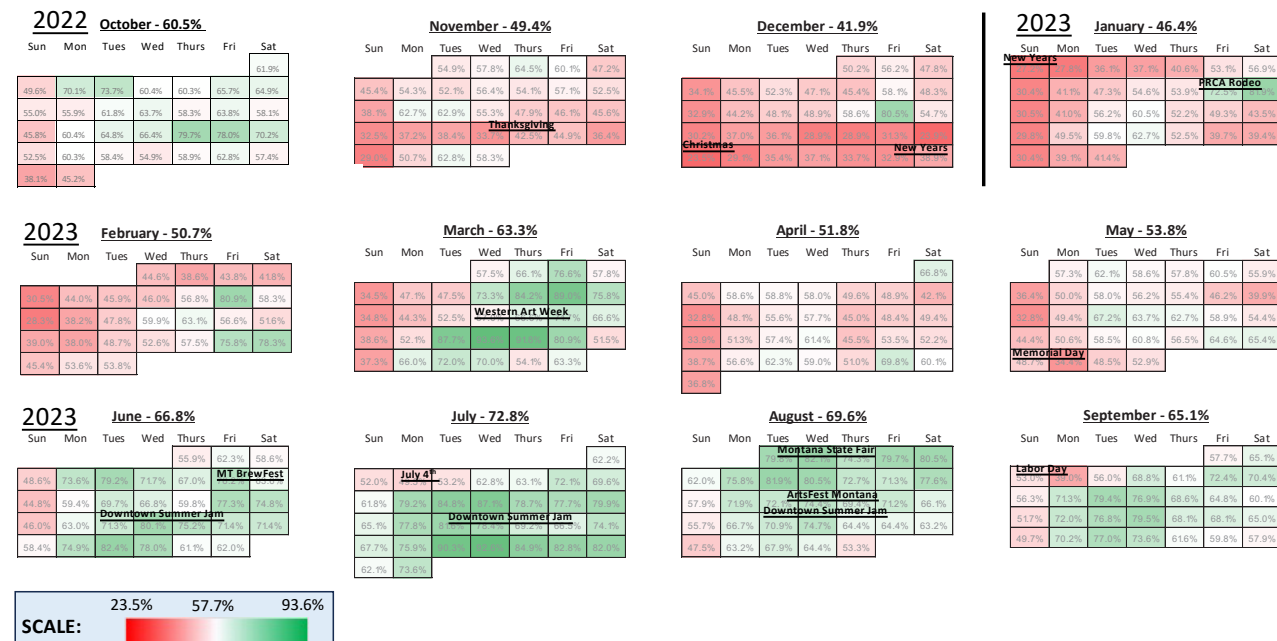


## LAST NIGHT IN GREAT FALLS – IMPACT FROM OVERNIGHT STAYS



## GREAT FALLS LODGING OCCUPANCY, 2022

Daily hotel occupancies for Great Falls hotels/motels are shown for Oct. 2022 – Sept. 2023. Green reflects high occupancy days with the darkest green showing the highest occupancy days of the year, while the darker red reflects lower occupancies. Annual occupancy for 2022 was 62.2%.



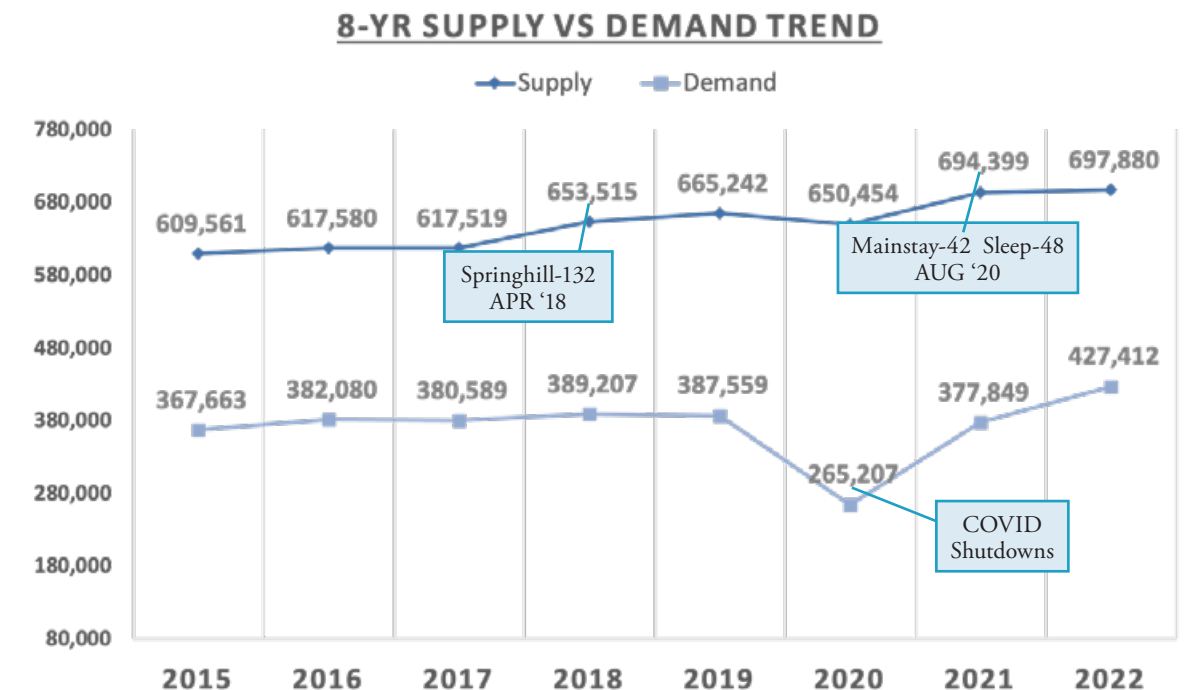
Source: Smith Travel Research

## GREAT FALLS LODGING MARKET SEGMENTATION, 2023

MARKET SEGMENTATION 2023	ALL	AIRPORT	DOWNTOWN
<b>Transient</b>	<b>71.7%</b>	<b>61.6%</b>	<b>79.5%</b>
Business transient (individual business travelers)	30.8%	25.9%	34.6%
Leisure transient (visiting attractions, shopping, visiting friends & relatives, passing through, etc.)	28.5%	24.4%	31.7%
Skilled workers (commercial, construction, laborers, etc.)	12.4%	11.3%	13.2%
<b>Group / Conference / Meeting</b>	<b>26.8%</b>	<b>35.0%</b>	<b>20.4%</b>
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%
<b>Other (reported as walk-in)</b>	<b>1.5%</b>	<b>3.3%</b>	<b>0.0%</b>

About 60% of lodging rooms are located in the Downtown area with the remaining 40% located near the Airport along the interstate.

## GREAT FALLS LODGING SUPPLY VS. DEMAND, 2015-2022

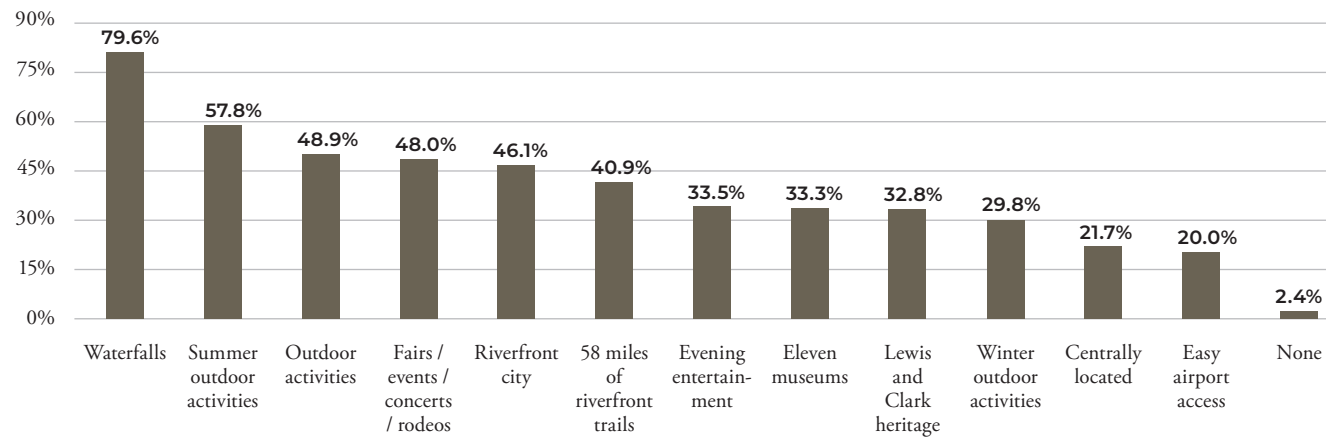


Source: STR



## BRAND IMAGE

Which of the following words or phrases inspire you to learn more about Great Falls?  
Please check ALL that apply. n=485



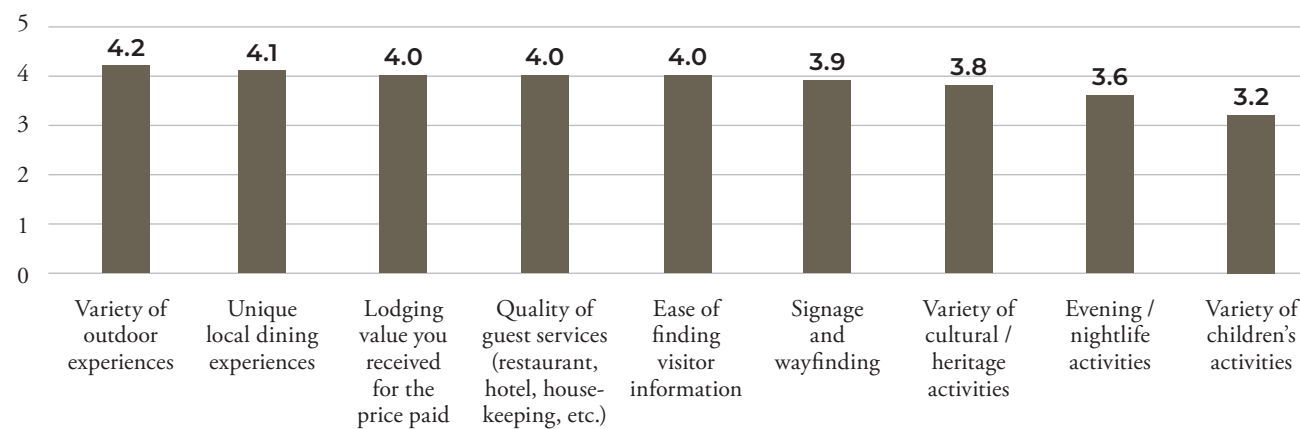
## RESIDENT RATING OF DESCRIPTIONS OF GREAT FALLS

Please rate Great Falls on each of the following statements on a scale from 1 to 5. n=1396

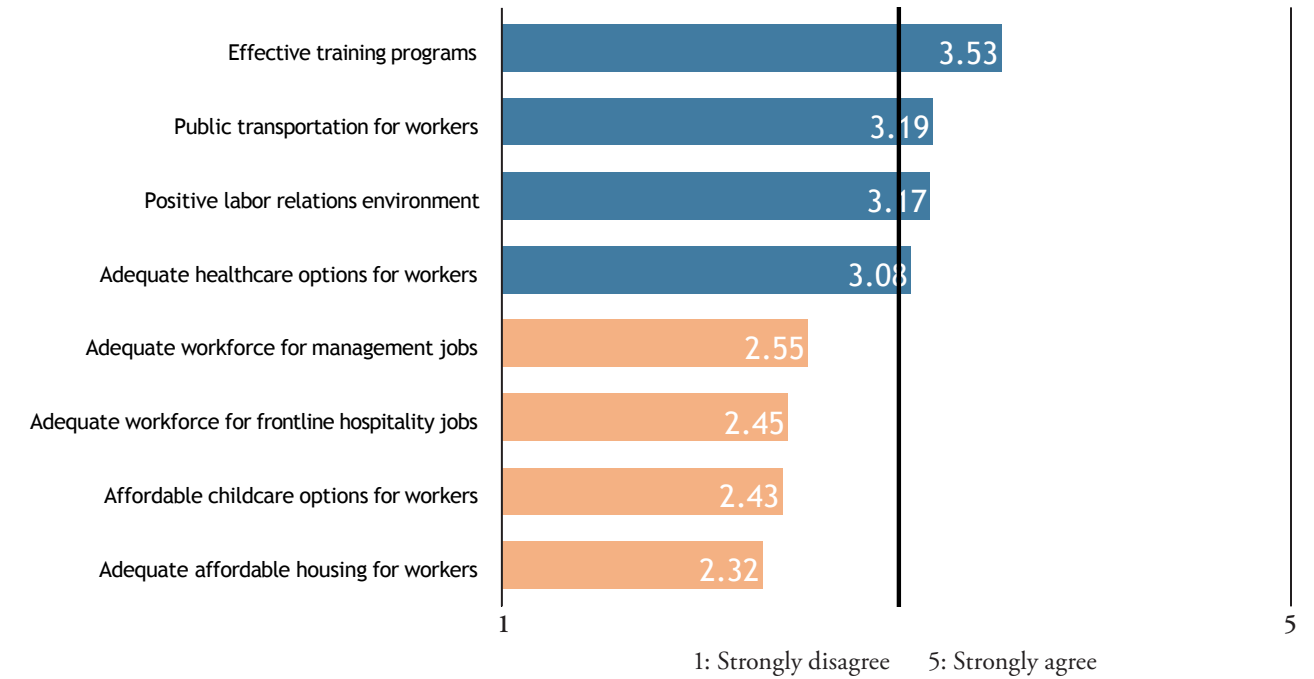
a place to live and work . . . . .	4.2	a meeting / conference destination . . . . .	3.8
a place to raise a family . . . . .	4.2	an active water recreation destination . . . . .	3.8
a day hiking/ trail destination. . . . .	4.1	a weekend getaway destination. . . . .	3.7
an active outdoors destination. . . . .	4.1	a place with dining and nightlife. . . . .	3.6
a place to retire. . . . .	4.0	a sports / events destination . . . . .	3.6
a bicycle friendly destination . . . . .	3.9		

## VISITOR RATING OF GREAT FALLS AMENITIES

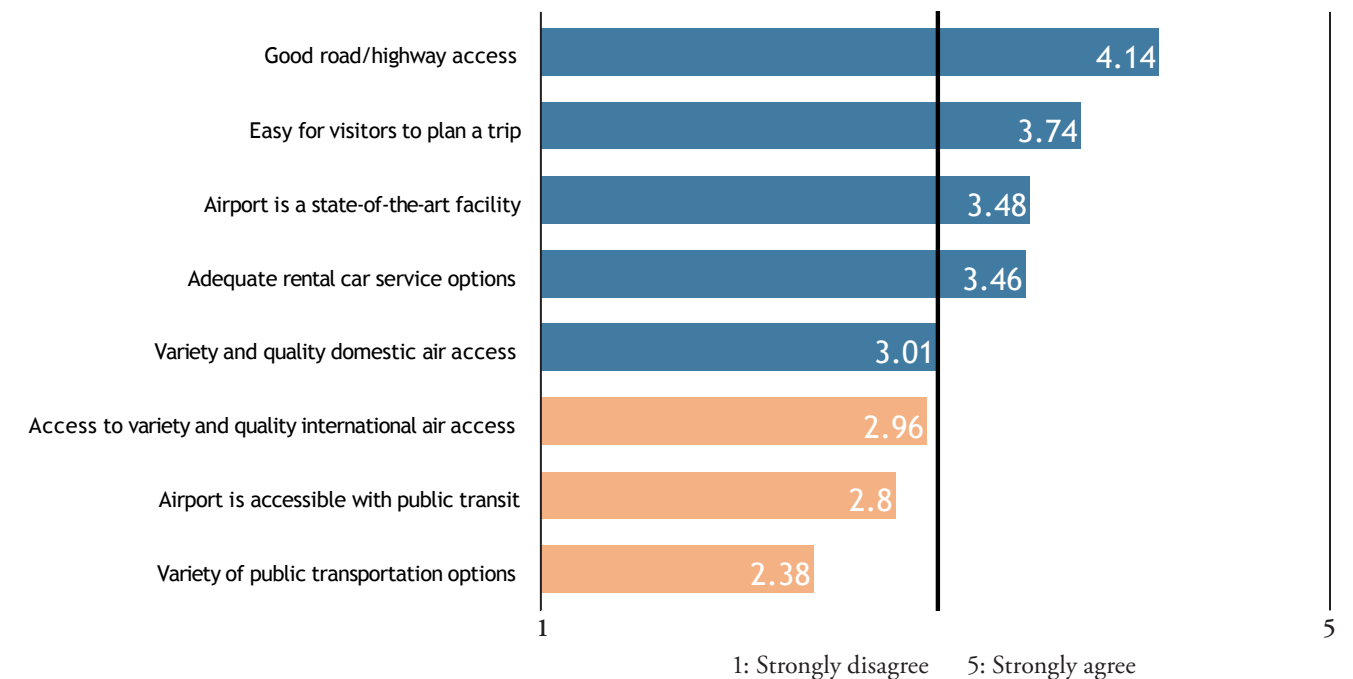
Following is a list of amenities offered in Great Falls. Considering your most recent visit, please rate each amenity using the satisfaction scale from 1 to 5. n=1396



## WORKFORCE DEVELOPMENT - DESTINATIONNEXT COMMUNITY ASSESSMENT SCORES



## DESTINATION ACCESS - DESTINATIONNEXT COMMUNITY ASSESSMENT SCORES







## APPENDIX B: GREAT FALLS DOCUMENTS REVIEWED IN THE PLANNING PROCESS

### GREAT FALLS MONTANA TOURISM

Montana's Basecamp: Great Falls Visitor Guide  
 Great Falls Montana Tourism FY 2024 Budget  
 Great Falls Montana Tourism website

### ECONOMIC DEVELOPMENT ORGS

2022 Great Falls Montana Community Guide (Great Falls Area Chamber of Commerce)  
 Great Falls Livability 2023 (Great Falls Development Authority)  
 Central Montana 2023 Travel Planner (Central Montana Tourism)  
 Great Falls International Airport website  
 Great Falls Medical District Final Master Plan, 2007

### CITY/COUNTY

City of Great Falls Growth Policy Update 2013  
 City of Great Falls Downtown Master Plan 2011  
 Missouri River Urban Corridor Plan 2004  
 Great Falls BrandPrint Final Report, October 25, 2012 (North Star Destination Strategies)  
 2020 Montana ExpoPark Improvement Study (CSL)  
 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 of Great Falls Wayfinding Plan 2020

### ATTRACTIONS/AMENITIES

Explore Great Falls, Montana Museums (Great Falls Museums Consortium)  
 River's Trail Edge brochure/map  
 River Trail maps/website  
 Great Falls Parks & Recreation Master Plan 2016

### STATE / FEDERAL

Central Montana Situation Assessment Presentation, July 14, 2023 (Coraggio Group)  
 Central Montana Tourism Strategic Plan and Marketing Analysis 2023 (Hingston Roach Group)

## APPENDIX C: STAKEHOLDER INTERVIEWS / VISITS

Scott Arensmeyer	<i>Springhill Suites</i>
Joe Briggs	<i>County Commissioner</i>
Marshall Brunner	<i>Holiday Inn</i>
Tyler Clark	<i>Heritage Inn</i>
Brett Doney	<i>Great Falls Development Alliance and Great Falls Montana Tourism Board</i>
Greg Doyon	<i>Great Falls City Manager</i>
Shane Etwiler	<i>Great Falls Chamber of Commerce</i>
Rebecca Engum	<i>Great Falls Montana Tourism</i>
John Faulkner	<i>Great Falls International Airport and Great Falls Montana Tourism Board</i>
Tianna Ford	<i>The Newberry, Enbar Craft Cocktail Lounge, The Block</i>
Jen Gray-O'Connor	<i>Corragio Group</i>
Owen Grubenhoff	<i>Great Falls Civic Center</i>
Rae Grulkowski	<i>County Commissioner</i>
Kayleigh Heims	<i>Great Falls Civic Center</i>
Heidi Hockett	<i>Touro University Montana College of Osteopathic Medicine</i>
Malissa Hollan	<i>Best Western Plus Riverfront</i>
Mike Keller	<i>Xanterra Parks (Yellowstone)</i>
Mayor Bob Kelly	<i>City of Great Falls</i>
Ron Korb	<i>Townsquare Media and Great Falls Montana Tourism Board</i>
James Larson	<i>County Commissioner</i>
Andy Ney	<i>Malmstrom Inn and Suites</i>
Kelly Pierce	<i>Downtown Great Falls and Great Falls Montana Tourism Board</i>
Scott Reasoner	<i>The Newberry, Enbar Craft Cocktail Lounge, The Block, and Voyagers Baseball Club</i>
Brad Reynolds	<i>Oakwells at Great Falls International Airport</i>
Lorraine Roach	<i>Hingston Roach Group</i>
Jeff Schull	<i>Days Inn and Great Falls Montana Tourism Board</i>
Susan Shannon	<i>Montana ExpoPark</i>
Brad Talcott	<i>West Bank Landing</i>
Wayne Thares	<i>Taco John's and Great Falls Montana Tourism Board</i>
Sandra Thares	<i>O'Haire Motor Inn, Sip 'n Dip and Great Falls Montana Tourism Board</i>
Thomas Trunkle	<i>Ursuline Conference Centre and Museum</i>

## APPENDIX D: PLANNING TEAM

Rebecca Engum	<i>Great Falls Montana Tourism</i>
Shannon Newth	<i>Great Falls Montana Tourism</i>
Kali Jean Tuckerman	<i>Great Falls Montana Tourism</i>
Darren Rudloff	<i>Rudloff Solutions</i>
Madelyn Matlock	<i>Young Strategies</i>
Berkeley Young	<i>Young Strategies</i>





TRAVEL INDUSTRY GROWTH PLAN  
for Great Falls, Montana  
- 2024 -