

# Application Summary

**Application:** FY26 DMO Plan - Visit Big Sky

**Applicant:**

**Funding opportunity:** FY26 DMO Plan

## Application Responses

**Organization Name:** Visit Big Sky

**First Name:** Brad

**Last Name:** Niva

**Street Address 1:** PO Box 160100

**Street Address 2:** 88 Ousel Falls Road, Suite B1

**City:** Big Sky

**State:** MT

**Zip:** 59716

**Funding Opportunity:** FY26 DMO Plan

**Amount Requested:** 1,019,479

**TAC Approved Budget:** 1,019,479

## General Description Information

**1. Describe your destination (who you are, who you wish to attract and why would they come) addressing your strengths, opportunities, and potential challenges.:**

### **1a. Destination:**

We've all heard the phrase "the sky's the limit." In Big Sky, Montana, that idea takes on new meaning—this community is constantly pushing boundaries and redefining what's possible as it grows into a world-class destination in Southwest Montana.

Each year, Big Sky marks new milestones that elevate the visitor experience. In 2025, two major developments highlighted this evolution. Big Sky Resort unveiled the Madison 8—the longest 8-passenger chairlift in North America—featuring heated seats and a weather-protective bubble for enhanced comfort. That same day, the resort celebrated the opening of a new gondola that connects guests to the forthcoming One&Only Moonlight Basin, a luxury hotel set to open in fall 2025. In the meantime, guests can experience "The Landing," a refined ski lodge and dining venue with direct gondola access.

While winter remains the anchor season, summer is gaining momentum—and fast. Looking ahead to 2027, a new gondola linking to the Lone Peak Tram will offer seamless access to Big Sky's 11,000-foot summit, solidifying the area as a must-visit for summer travelers. Activities like horseback riding, fly fishing, whitewater rafting, hiking, and mountain biking continue to enrich Big Sky's summer appeal, and it's likely that summer visitation could surpass winter revenue in the next five years.

These new investments reinforce Big Sky's status as a leading luxury destination in the Mountain West. But beyond the latest amenities, it's the community's enduring charm that keeps visitors coming back. With over 900 ski-in/ski-out lodging options, a lively town center, and a rich mix of restaurants and shops, Big Sky has delivered unforgettable experiences for more than 50 years—and shows no sign of slowing down.

### **1b. Strengths:**

Big Sky in cooperation with Bozeman has invested greatly in airlift investments which have now paid off with over 22 non-stop flights around the United States. Where many communities in Montana try and establish daily non-stop service, Bozeman-Yellowstone Airport has invested more in seasonal, weekly flights and allowed the airlines to see the demand for themselves which has in-turn developed more long term daily flights to key markets. The winter of 2024/2025 we added a new winter only Saturday flight between BZN and Washington DC. This new flight with United has exceeded expectations and we look forward to making this flight year round. Delta committed to daily service from BZN to Boston-Logan International in 2025 which now is our second non-stop daily to Boston, rivaling Jet Blue's daily service. In March this year we hosted the third Big Sky Air Summit where we had five airlines spend a few days in Big Sky discussing future development into new markets. The Big Sky team is specifically looking for a direct flight into the Florida market in the near future and increased daily non-stop in the Los Angeles and San Jose/San Francisco markets as well.

Besides airlift, the investment in lodging continues to drive demand. Big Sky has always had a deficiency in traditional hotel rooms and short-term rentals have become the only other option for lodging. In 2025, we'll open two new hotels and break ground on a third. We expect these investments to only become the norm for the foreseeable future as more branded hotels stake a claim in Big Sky.

As mentioned in our FY2025 marketing plan, Big Sky Resort had finished it's new 75 passenger tram to the peak of Lone Mountain. In the summer of 2025 the resort is husseling to build the new Explorer 10 passenger gondola that will connect the base village at the resort to tram base, and then whisk visitors to the peak. This newest addition will be a catalyst for significant summer visitation to Big Sky. To date, our summer product options have been dedicated to horseback riding, mountain biking, fly fishing and rafting. The new gondola, to the tram is a great addition for someone looking for "soft-adventure" and this new product will be ADA compliant as well.

Besides additional infrastructure to support summer and winter operations we see a long term strength in the development of recycling water for future snowmaking to offset global warming. For over 10 years Big Sky has been working with the Montana Department of Environmental Quality to establish rules and regulations to take treated effluent from our "state of the art" water and sewer plant, clean it to the highest quality for discharge and instead of putting it in the river like 120 communities in Montana are permitted to do, Big Sky is making snow with cleaned water. This "new snow" becomes the snowbase for the winter and over the next six months it slowly freezes and thaws and eventually melts into the ground and recharges the underground aquifer where it's eventually pumped back to the surface and meets the needs of Big Sky's water needs. This novel approach is a significant strength to support the long term

demands on the environment as Big Sky continues to grow.

### **1c. Opportunities:**

Visit Big Sky annually reviews opportunities where we can support the visitor economy and our partners. Not just hoteliers, restaurants and retailers, but also the community we serve and the residents who rely on a strong visitor economy.

#### **Summer Is Knocking on the Door**

While Big Sky has long been known as a premier winter destination, the momentum is shifting. With a growing number of hotels, a thriving retail and restaurant scene, and increased focus on summer offerings, our sights are set on building a stronger summer season to support the local business community.

Big Sky has always aimed to be the premier lodging base for Yellowstone National Park visitors. Now, with the introduction of summer rides on the Lone Peak Tram, new hotel developments, and the ongoing expansion of our trail system for hiking, mountain biking, and horseback riding, we're creating a vibrant new chapter for Big Sky's summer economy.

#### **Destimetrics Returns as Data Partner**

Visit Big Sky has reinvested in Destimetrics as our data intelligence partner, providing key insights into overnight occupancy, average daily rate, and forward-looking room demand. After previously using Destimetrics in 2021, we transitioned to KeyData for its direct-source accuracy. However, after three years, we're returning to Destimetrics to better serve our stakeholders. This platform offers comprehensive data across traditional lodging, short-term rentals, and property management—critical for our seasonal, diversified market. This strategic investment enhances our ability to support informed decision-making across the community.

#### **International Market Expansion – Australia and Beyond**

Expanding into new international markets carries both risk and reward. In 2023, Visit Big Sky partnered with Jackson Hole to promote our destinations jointly in Australia at key ski travel expos. Unlike states like Colorado and Utah with statewide ski tourism initiatives, this partnership allows us to act as a unified destination. With the IKON Pass, international visitors can enjoy five days of skiing at each resort, and a regular shuttle service links the two, just 3.5 hours apart. Since this initiative began, Australian visitation has grown by 8%, with spending up 13% even before the campaign launched. Looking ahead, we aim to expand this successful model to the UK and South America.

#### **Mountain Town DMO Collaborative**

Launched by Visit Big Sky in 2024, the Mountain Town DMO Group brings together 12 ski destinations for bi-monthly collaboration on shared challenges and opportunities. While ski towns may be competitors, the COVID era highlighted our shared goals. This peer network has already hosted six meetings and will

convene in Park City, Utah, in July 2025 for its first in-person summit. Topics include climate resilience, tourism funding, workforce housing, and vacation affordability. Current members include Lake Tahoe resorts, Sun Valley, Jackson Hole, Breckenridge, Aspen, Vail, Telluride, Snowmass, and Bend, Oregon.

## **Destination Strategy – From Planning to Action**

Visit Big Sky's comprehensive Destination Strategy, initiated in 2024, has transitioned from planning to implementation. We've launched four action teams and plan to introduce workforce and outdoor recreation groups by FY26. While some residents question why Visit Big Sky leads this effort, our mission is to shape a 15-year roadmap for smart growth—balancing visitor experience with community needs. With Big Sky's rapid development, this work lays the foundation for sustainable tourism that aligns with long-term local priorities.

- **Arts & Culture – Building a Cohesive Calendar**

This action team includes representatives from music venues, galleries, art festivals, public art programs, restaurants, and promoters. In its first six months, the group has fostered monthly collaboration and launched a major win for 2025: a shared community-wide events calendar. Visit Big Sky provided funding for AI-powered software that aggregates local calendars into a single guide for residents and visitors, making event discovery easier and more inclusive.

- **Active Transportation – Reducing Car Dependency**

Addressing transportation in a rural mountain town is no small feat. This team is currently fundraising to develop Big Sky's first Active Transportation Plan. The vision: enable visitors to travel from the airport to Big Sky via public transit and navigate town using a seamless system of shuttles, bike paths, and pedestrian networks—eliminating the need for a rental car and reducing environmental impact.

- **Marketing Action Team – Unified Messaging**

The Marketing Action Team unites Big Sky's diverse marketing voices—from large-scale resort teams to small local businesses—to ensure our messaging is cohesive and visitor-centric. Coordinated by Visit Big Sky and supported by DVA Advertising, our Agency of Record, this effort amplifies our marketing ROI and minimizes conflicting narratives. A key component of our messaging focuses on responsible visitation—educating guests on how to be good stewards of Big Sky while keeping resident needs top of mind.

- **Sustainable Business Practices – Small Steps, Big Impact**

Led by the Big Sky Sustainable Network Organization (SNO), this action team is making progress "one bite at a time." The group's first win is a toolkit for local restaurants offering vetted, sustainable "to-go" packaging options. Future expansions will include resources for lodging and retail businesses—such as recommending refillable bath amenities over single-use plastics. These efforts help move Big Sky toward a greener, more responsible tourism model.

- **Workforce Initiatives – On the Horizon**

No destination thrives without a strong, supported workforce. While several workforce programs exist in Big Sky, there's no central coordinator to unify and expand them. With additional funding, we hope to hire dedicated staff to manage current efforts and explore new strategies to address housing, recruitment, retention, and quality of life for our workforce—the backbone of our tourism economy.

## **1d. Potential Challenges:**

**Challenges for Big Sky:** There is no doubt that Big Sky has challenges in reaching their long-term goals. Below is a list that is too familiar to any ski town in the west. However, I'm more optimistic compared to previous years. The following are all "frequent challenges" but as stated in our "opportunities" section we're addressing this issues and in the last four years post covid we're getting some traction in solving these daunting tasks.

### **1. Workforce Shortages and Housing Affordability**

The rapid growth in tourism has intensified the demand for service workers. However, 74% of Big Sky's workforce resides outside the area, leading to long commutes and potential labor shortages during peak seasons. The lack of affordable housing within Big Sky exacerbates this issue, making it difficult to attract and retain employees essential for the tourism sector.

### **2. Infrastructure Strain and Transportation Challenges**

Seasonal surges in visitor numbers place significant pressure on Big Sky's infrastructure. Congestion during winter and summer peaks leads to traffic bottlenecks and overburdened facilities. Efforts are underway to develop an Active Transportation Plan aimed at enhancing public transit and reducing car dependency, but implementation remains a work in progress.

### **3. Environmental Sustainability Concerns**

The influx of tourists poses risks to Big Sky's natural ecosystems. Increased foot traffic can lead to trail erosion, wildlife disturbances, and strain on water resources. Balancing tourism growth with environmental preservation is crucial to maintain the area's appeal and ecological health.

### **4. Community Tensions and Cultural Shifts**

The rapid development associated with tourism has led to concerns among residents about cultural erosion and community identity. Some locals feel that the emphasis on tourism development overshadows the needs of the community, leading to tensions between growth and preservation of local character.

### **5. Economic Dependence on Tourism**

Big Sky's economy is heavily reliant on tourism, making it vulnerable to fluctuations in visitor numbers due to factors like economic downturns or global events. Diversifying the local economy and developing

year-round attractions are essential strategies to mitigate this risk.

## **6. Loss of International Travelers** (specifically Canada and Mexico)

With the turmoil at our northern and southern borders there is a real threat that we'll see less visitors from Canada and Mexico. At the time of this writing, bookings are looking okay for right now, however we're concerned about future visitation.

---

:

### **2. Briefly describe how your destination aligns with the Montana brand or describe the Brand strategy for your DMO.:**

Big Sky is aligned 100% with the Montana brand and we're held to that highest standard by the visitors who come to Montana and particularly to Big Sky who have these expectations upon arrival. Big Sky sells experiences and memories. We have the mountains, the lodging and the natural beauty that visitors expect in their Montana experience.

We continue to hear it from visitors daily that "everyone in Montana is so nice!" We as a state need to make sure that is always our "north star" and we continue to support our tourism economy as a "world class destination".

:

**Destination Marketing:** ☒

**Destination Management:** ☒

**Destination Stewardship:** ☒

**Destination Development:** ☐

:

### **3a. Define your audience(s) (demographic, geographic and psycho-graphic):**

#### **Strategic Role for Visit Big Sky in 2025/2026**

Visit Big Sky has shifted the weighting of these initiatives annually but since COVID they have tended to be pretty predictable. Where 2021 thru 2023 Big Sky had distinct negative resident sentiment toward the tourism industry and in our 2023 Visitor and Resident sentiment study proved what we were seeing on the ground. That being said, there is a more positive perception of tourism and the Visit Big Sky has been really leaning into supporting our tourism messaging efforts to change perspective.

---

**Demographic Overview of the Big Sky Visitor:** Over the past three years, the efforts of Visit Big Sky have increasingly been recognized as a model for "good tourism." Through our destination management

and strategic planning work, we've refined our understanding of our target audience—demographically, geographically, and behaviorally—thanks to advanced tools and data from our research partners.

Notable in 2025, we're seeing a younger visitor who has the same wealth as our previous most popular visitor. Where we've consistently had visitors over the age of 50, in 2025 we saw the largest visitor group being under 50 years of age but having the same level of wealth with average annual incomes over \$150,000 a year.

Similar to last years data we still see 60% of our guests hail from diverse locations across the U.S., the remaining 40% are concentrated in five key states—areas well-served by direct air service to Bozeman.

### **Geographic Overview of the Big Sky Visitor:**

This trend validates our focus on attracting high-value, targeted visitors. Rather than casting a wide net, we've prioritized focused marketing efforts in these five core markets—and the return on investment is clear.

#### **Top 5 visitor markets for Big Sky in 2025:**

1. **New York/New Jersey**
2. **Chicago**
3. **Los Angeles**
4. **Seattle**
5. **San Francisco**

This list tends to shift year over year and different cities fall out of this list. An example being in 2024 Washington DC/Maryland was #5 and Seattle wasn't listed. However, that does change based on airlift changes. In Winter 2025, United added a direct flight from Washington DC/Dulles to Bozeman on Saturday's. Another example is the fact that both Jet Blue and Delta now have direct flights from Logan airport in Boston. We'd expect Boston to join the list in the top 5.

---

### **Psycho-Graphic Overview of the Big Sky Visitor:**

Visitors to Big Sky, Montana, are typically affluent, experience-driven travelers who seek authentic, nature-based adventures in an uncrowded, exclusive setting. They value personal growth through outdoor recreation such as skiing, fly-fishing, hiking, and wildlife viewing, and are willing to invest in premium lodging, dining, and guided experiences. Many travel with families or in multi-generational groups, looking for destinations that provide safety, comfort, and enriching activities for all ages.

This audience is also sustainability-conscious and emotionally motivated, preferring destinations that demonstrate environmental stewardship and community support. They are tech-savvy and research-focused, using digital platforms, social media, and peer reviews to plan their trips. Effective marketing to this segment should focus on values-based storytelling that highlights Big Sky's scenic beauty, sense of solitude, and commitment to responsible tourism.

---

**Destination Marketing 60%:** The marketing efforts will continue to be our focus based on the seasonality that still occurs annually in Big Sky. The long-term goal for Big Sky is to have a 10-month tourism economy but that won't happen without additional marketing efforts and additional resources dedicated to reach that goal. In FY2026 we'll open three new hotels and the expectation is that Visit Big Sky will continue to drive demand to support these new properties.

**Key goals for destination marketing for FY26:**

- 1) Prioritize marketing efforts for 2025/2026 to winter and summer campaigns with an extension of those seasons by an additional two weeks.

In a 2024 stakeholder engagement session, it was determined the best course of action is to not sell the shoulder seasons, but to extend our summer and winter businesses. Big Sky Resort, did extend the 2024/2025 winter season but we saw a significant drop in visitation after April 6, 2025. In our conversations with Vail, Aspen and Jackson Hole they are really selling a 10 month season, and leaving October and November as "quiet season". This being our first year to extend into late April, we need to do additional marketing efforts to grow the market to meet our goals.

- 2) Offer incentives to encourage an earlier booking window.

Ever since the pandemic we've continued to see the booking window go back to pre-pandemic levels with 6-8 week lead times in winter and summer. Summer is seeing a shorter window but it continues to be strongly based on visitors to Yellowstone who realize that lodging can be limited during a busy summer season.

- 3) Targeted Online Campaigns: With the addition of a new digital agency we're focused on:

- Online Behavioral Advertising: based off of visitor browsing habits and placing relevant display ads to push a campaigns
- Retargeting Initiative: via mobile devices with mobile ads, social media and emails based on previous websites visited.

- 4) Develop partnerships with airlines and hotel partners to develop additional interest in visiting Big Sky later into the season. Future plans will be airline incentives such as "book four nights and get a \$400 air credit certificate." This effort will take additional funding to make it a reality.

**Destination Management 20%:** Visit Big Sky has put a focus on destination management and specifically messaging visitors on being a "good visitor". Our dedicated visitor messaging continues to be a popular effort not just for the visitors but residents appreciate our efforts in this space. Often the messages are fun and comical and educate the visitor without pointing a finger or blaming visitors for some of the common challenges that visitors cause.



## **Key goals for Destination Management for FY26**

### **1) Update the visitor/resident sentiment study and visitor feedback**

With the completion of our Visitor and Resident Sentiment Survey for Tourism in 2023 we've got a solid baseline to work from for our Destination Management and Strategy work. We'll do a new updated Resident and Visitor Sentiment study in 2026 where we can see if we've moved the needle in responding to what we learned in 2023.

### **2) Continue to develop the roadmap for Big Sky as a destination as well as a community of 3500 residents.**

Our destination roadmap continues to influence future choices for our community. With a dynamic team of community leaders who are supporting this effort we have consensus on where we'd like to go and how we're going to get there. We do need to look at what we can accomplish with our current resources which are limited due to our funders. With additional funding we hope to do more in 2026.

### **3). Seasonal Workforce Initiative**

Big Sky is unique in the fact that we have over 3000 seasonal workers who come from all over the world. However, does our workforce feel welcomed? Do they feel safe? What is their experience like in Big Sky? This is one of our key initiatives for 2026 and we need to continue to develop this effort. There is a competitive advantage to continue to do this work. Using a model established at Whistler/Blackcomb in British Columbia we have seen how a community welcomes and supports the workforce in a more supportive way. That is our goal for Big Sky.

## **Destination Stewardship 20%**

After completing our Destination Strategy in late 2024, we're now supporting our Destination Strategy Action teams that are boots on the ground in our community. To date we have four teams and launching a fifth in FY26.

- **Arts & Culture – Building a Cohesive Calendar**

This action team includes representatives from music venues, galleries, art festivals, public art programs, restaurants, and promoters. In its first six months, the group has fostered monthly collaboration and launched a major win for 2025: a shared community-wide events calendar. Visit Big Sky provided funding for AI-powered software that aggregates local calendars into a single guide for residents and visitors, making event discovery easier and more inclusive.

- **Active Transportation – Reducing Car Dependency**

Addressing transportation in a rural mountain town is no small feat. This team is currently fundraising to develop Big Sky's first Active Transportation Plan. The vision: enable visitors to travel from the airport to Big Sky via public transit and navigate town using a seamless system of shuttles, bike paths, and pedestrian

networks—eliminating the need for a rental car and reducing environmental impact.

- **Marketing Action Team – Unified Messaging**

The Marketing Action Team unites Big Sky’s diverse marketing voices—from large-scale resort teams to small local businesses—to ensure our messaging is cohesive and visitor-centric. Coordinated by Visit Big Sky and supported by DVA Advertising, our Agency of Record, this effort amplifies our marketing ROI and minimizes conflicting narratives. A key component of our messaging focuses on responsible visitation—educating guests on how to be good stewards of Big Sky while keeping resident needs top of mind. At the same time investing in our visitor economy.

- **Sustainable Business Practices – Small Steps, Big Impact**

Led by the Big Sky Sustainable Network Organization (SNO), this action team is making progress “one bite at a time.” The group’s first win is a toolkit for local restaurants offering vetted, sustainable “to-go” packaging options. Future expansions will include resources for lodging and retail businesses—such as recommending refillable bath amenities over single-use plastics. These efforts help move Big Sky toward a greener, more responsible tourism model, especially considering future wildfire threats.

- **Workforce Initiatives – On the Horizon**

No destination thrives without a strong, supported workforce. While several workforce programs exist in Big Sky, there’s no central coordinator to unify and expand them. With additional funding, we hope to hire dedicated staff to manage current efforts and explore new strategies to address housing, recruitment, retention, and quality of life for our workforce—the backbone of our tourism economy.

### **Two key goals for Destination Stewardship for FY26**

1. Hire a staff person to manage these evolving action teams. We have found that a facilitator is required to keep these projects moving forward and with volunteer leaders a paid staff person can manage calendars and keeping the groups engaged.
2. Find additional funding to support these teams as we move forward. Some of our action teams are in a research phase but others have jumped ahead and ready to commit funds to projects. To move the needle dedicated funding will be required.

### **3b. What research supports your DMO strategy? :**

Visit Big Sky for the last four years has been focused on building a robust dataset to support our offices requirements but to also be the "authority" within our community on the data front.

### **Research Initiatives for FY26**

1. **Monthly Pacing Reports for Big Sky Businesses**

With investments in Destimetrics, Datafy, and AirDNA, Visit Big Sky continues to provide “real-time” data to support our business community. Our monthly pacing reports track forward-looking lodging bookings across the market, giving not only hotels but also restaurants, outfitters, and retailers a clearer picture of anticipated demand. For example, if occupancy projections for the week of February 6th show over 80%, a local restaurant can plan staffing and inventory accordingly.

## **2. Identifying Trends at All Levels: Local to National**

With over 2,000 rooms to fill, it’s critical to monitor demand indicators across the spectrum. We rely on regional and statewide data sources such as ITRR, while also maintaining regular communication with key partners like Xanterra in Yellowstone National Park, who often identify visitation trends earlier than we do. In winter, weekly coordination with Big Sky Resort helps us align skier visit trends with lodging forecasts to better inform our partners.

## **3. Serving as the Trusted Source for Visitor Economy Insights**

Visit Big Sky has committed to leading the research charge for the Big Sky community. Since 2022, we’ve consolidated destination data into a monthly report and executive summary that outlines key performance indicators and market trends. Our goal is to provide reliable, accessible insights to stakeholders across the destination, fostering data-informed decisions and coordinated action.

## **4. Benchmarking Against Competitive Mountain Destinations**

While Montana data remains important, Big Sky competes on a national scale. For the past three years, we’ve tracked 14 peer ski destinations across the U.S. using AirDNA’s short-term rental data to assess our performance and new for FY26 the addition of Destimetrics will support this effort. These insights—on average daily rates, occupancy trends, and room-type preferences—help guide our marketing strategy and ensure we remain competitive in the broader “mountain town marketplace.”

As mentioned above in Opportunities we're pivoting are largest investment in data away from Key Data and coming back to Destimetrics. This platform isn't as robust as KeyData but it does have a niche in mountain communities and will give us a more robust comp set to monitor. One of the failures in KeyData was that we lost group booking data and it became evident in the last year that our group business continues to grow and if we can't track that we're missing out on a large part of our data.

### **Goals for Destimetrics in FY26**

- Establish a new baseline with 12 lodging partners contributing data on a monthly basis which tells the story on occupancy, days in market and average nightly rate.
- Take our dataset from Destimetrics and combine it with Sun Valley, Jackson Hole, Aspen, Telluride, Vail and Park City to get a better idea of how we're comparing to other destinations and get a pulse on the winter ski market as a whole.
- Pull together a lodging partner data call on a monthly basis which get's our partners talking and sets Visit Big Sky as the facilitator and organizer of this effort.

Below is the list of our other suppliers and what these platforms produce for Visit Big Sky.

**AirDNA-** Scrape data on short term rental inventory. This realtime platform shares occupancy, room count and average nightly rate on the nearly 1500 STR in inventory in Big Sky.

**Datafy:** This Geolocation Data analysis platform is our go to for visitor tracking but what makes it unique is that it is our largest digital ad placement program as well.

**ITRR:** Montana is lucky to have a top-notch data collection service at the University of Montana. Their annual visitor tracking and spending data on a regional and statewide basis is very helpful.

**VisaVue:** Is a subscription based platform that offers detailed reports on domestic and international visitor spending. It's the most comprehensive platform for confirming where our visitors come from and their spending habits while in Big Sky.

**Blue Room Research:** Led by tourism research expert Steve Halasz, this agency produces our monthly reports where they pull all this data into an easy to read report for our community.

**Dean Runyan Associates:** Annually this agency produces the Economic Impact Analysis report. This "report card" pulls together data from the previous year including annual workforce, visitor counts, visitor spending and other key indicators.

### **3c. What are your emerging markets?:**

#### **International and Domestic Market Investments & Strategic Partnerships**

Visit Big Sky remains committed to expanding its reach in key international markets—including Australia, the United Kingdom, Mexico, and South America—while continuing to support IKON passholders and strengthen engagement with domestic travelers.

In 2023, Visit Big Sky joined forces with Big Sky Resort and Jackson Hole to launch a three-year marketing initiative focused on the Australian ski market, identified as an emerging opportunity for January travel. In Australia, the Christmas holiday marks the start of summer vacation, making it a prime window for international ski trips. Together with Jackson Hole, Big Sky promoted a 12-day Northern Rockies itinerary featuring five days at each resort. With the addition of a new shuttle service connecting the two destinations, the product offers Australian travelers a seamless, high-value ski experience.

After just two years, the results speak for themselves: a 72% increase in visitor spending and a 40% year-over-year rise in Australian visitation to Big Sky.

Building on that success, Visit Big Sky entered the UK market in October 2024 through a similar partnership with Jackson Hole. Together, they participated in ski trade shows and media engagements in

London to introduce Big Sky to British travelers seeking premium ski destinations.

Interest from Latin American markets is also gaining traction. While Big Sky has yet to actively market in Spanish-speaking countries, recent data from Visa Vue reveals a 176% increase in spending from Brazilian visitors. With growing interest from Mexico and Brazil, Visit Big Sky is exploring a Spanish-language marketing campaign for FY26.

### **Domestic Emerging Markets**

Significant investments in air service development by Big Sky, Bozeman Yellowstone International Airport, and Yellowstone Country have helped lay the foundation for domestic growth. At the annual Big Sky Air Summit, stakeholders emphasized the need for a direct flight from Florida, ideally from Miami. This route would not only provide a strong Florida market presence but also open a gateway to South America.

Similar to the successful development of United's Washington Dulles (IAD) flight, Visit Big Sky will continue to support marketing and air service incentives in high-potential markets. The IAD route in particular has proven valuable—not only for access to the Washington D.C./Maryland/Virginia region, but also for its extensive hub connections, enabling convenient travel from secondary markets like Raleigh-Durham and others.

---

:

**4a. Describe proposed tactics and projects as related to overall goals and controlled by the organization in its financial statements.:**

## **FY26 Marketing and Communications Initiatives**

### **1) Website Rebrand and Creative Refresh**

With a new advertising agency, DVA, joining our team in March 2025, Visit Big Sky is entering a dynamic new era of brand development. Following several years of operating with an outdated brand—due to COVID disruptions and the early termination of a previous agency contract—FY26 will focus on rebranding of our website and creative assets. This refresh will better reflect the evolving identity of Big Sky as a premier travel destination.

### **2) Public Relations and Earned Media Strategy**

Over the past three years, Visit Big Sky has hosted more than 65 vetted media professionals, resulting in a strong portfolio of earned media coverage. In FY26, we'll shift focus to new and more regionally targeted publications such as the *San Jose Mercury News* and *Bellevue Reporter* to reach high-potential audiences.

We'll also continue participation in leading industry events like the International Media Marketplace, expanding our reach in key domestic and international markets. Our ongoing collaboration with Big Sky Resort will remain central to our PR efforts, building on three years of shared momentum.

### **3) Stakeholder Resources: Data, Training, and Engagement**

Providing value to our local partners is a core priority. Visit Big Sky will continue to develop and deliver industry-leading resources, including timely research, front-line staff training programs, and structured listening sessions with stakeholders. These efforts ensure we remain responsive to partner needs and aligned with the growth of Big Sky's visitor economy.

### **4) Air Service Development and Airport Expansion Support**

Visit Big Sky will continue to champion air service development in collaboration with Big Sky Resort and Bozeman Yellowstone International Airport. In February 2026, we will co-host the fourth annual Big Sky Air Summit, bringing together representatives from six major airlines. This summit is a proven model for fostering airline relationships and advancing future route development. We will also continue to support marketing and incentive funding to align with airline goals and expand Big Sky's air connectivity.

### **5) International Travel Trade and Media Expansion**

To grow Big Sky's international audience, Visit Big Sky and Big Sky Resort will return to Australia in spring 2025, building on the success of previous outreach. Although international visitors currently make up just 1% of winter guests, the potential for growth is significant. By partnering with Jackson Hole to create joint ski itineraries, we are building a competitive product designed for global appeal.

### **6) Targeted Digital Campaigns with DVA and Datafy**

FY26 marks a significant shift in our digital strategy. With our new agency partner, DVA Advertising, and enhanced geolocation tools from Datafy, we've launched targeted campaigns with measurable ROI. Our Winter 2025 digital campaign delivered remarkable results, achieving a return on ad spend (ROAS) of \$43 for every \$1 invested—the strongest campaign performance to date. These results set the stage for more ambitious and data-driven campaigns in FY26 and beyond.

### **7) Summer Visitation: Increasing Length of Stay and Local Spend**

A key growth opportunity lies in increasing summer visitor length of stay and in-market engagement. While winter visitors average more than four days in Big Sky—often focused solely on skiing—summer visitors currently average just 2.9 days and tend to use Big Sky as a basecamp for exploring the surrounding region. Our goal for FY26 is to develop and promote summer activities that encourage longer stays and increased local spending, helping to strengthen Big Sky's position as a year-round destination.

#### **4b. How will the addition of LFST funds enhance your overall goals?:**

The additional \$60,000 in LFST funding will provide a \$12,000 boost to our administrative budget, helping to offset rising benefit costs.

The remaining funds will be allocated toward research and earned media initiatives. As part of our FY26 strategy, we plan to update the resident and visitor sentiment survey to ensure our efforts remain aligned

with community and traveler perceptions. We will also continue investing in our earned media program and participate with Brand USA in an upcoming FAM tour focused on the Oceania market.

**5. Define and describe your overall objectives. Objectives are formed from your goals. They are logical, attainable steps to achieve the goals and are able to be measured.:**

**Objectives/Metrics/Evaluation:**

OBJECTIVES	MEASURABLE METRICS FOR SUCCESS	REPORT THE METRIC ACHIEVED	EVALUATION OF SUCCESSFUL METRICS
Launch a rebranded Visit Big Sky website and updated creative suite by Q4 FY26 that reflects Big Sky's identity as a premier, four-season destination.	<ul style="list-style-type: none"> <li>• Complete website updates and brand asset refresh by September 2026</li> <li>• Achieve a 20% increase in website engagement metrics (time on site, pages per session) within six months of launch</li> </ul>		
Expand Visit Big Sky's earned media coverage by diversifying media targets and strengthening strategic PR partnerships.	<ul style="list-style-type: none"> <li>• Secure at least 15 placements in targeted regional publications by end of FY26</li> <li>• Participate in 3 national or international media marketplaces (e.g., IMM, Travel Classics)</li> <li>• Host 10 new media representatives in FY26 with a minimum of 5 originating from</li> </ul>		

	new geographic markets		
Enhance stakeholder engagement through timely access to research, industry training, and feedback mechanisms.	<ul style="list-style-type: none"> <li>• Deliver 4 seasonal stakeholder training sessions or webinars</li> <li>• Conduct 2 formal listening sessions and 2 industry surveys annually</li> <li>• Distribute quarterly research briefs or data insights relevant to local business operations</li> </ul>		
Strengthen Big Sky's air service capacity by supporting route development and sustaining airline partnerships.	<ul style="list-style-type: none"> <li>• Successfully host the 2026 Big Sky Air Summit with participation from at least 6 airlines</li> <li>• Provide cooperative marketing or incentive funding for a minimum of 2 key seasonal routes</li> <li>• Support the addition or retention of at least one direct domestic flight to a</li> </ul>		



	priority market		
Execute data-driven marketing campaigns that drive measurable visitation and spending.	<ul style="list-style-type: none"> <li>• Launch 3 seasonal digital campaigns with clear geolocation attribution metrics</li> <li>• Maintain or exceed a return on ad spend (ROAS) of \$30:\$1 on all major campaigns</li> <li>• Increase unique website visits by 25% year-over-year from campaign-targeted regions</li> </ul>		

:  
**Budget Form:** Big Sky 2026 DMO Budget Form LST LFST (2).xlsx

:  
**DMO Budget:**  
**Visit Big Sky**

Allowable Method	Budget	% Budgeted	Amend +/-	Updated Budget
<b>Lodging Facility USE Tax (LFUT) Budget</b>	<b>\$944,479.00</b>			
Administration	\$188,895.80	20.00%		\$188,895.80
Agency Services	\$140,000.00	12.96%		\$140,000.00
Cooperative Marketing	\$10,000.00	0.93%		\$10,000.00
Education/Outreach	\$5,000.00	0.46%		\$5,000.00
Joint Ventures	\$3,000.00	0.28%		\$3,000.00
Marketing Personnel	\$85,000.00	7.87%		\$85,000.00
Marketing Resources	\$60,000.00	5.56%		\$60,000.00

Opportunity Marketing	\$84,000.00	7.78%		\$84,000.00
Paid Media	\$80,000.00	7.41%		\$80,000.00
Product Development	\$125,000.00	11.57%		\$125,000.00
Research	\$15,000.00	1.39%		\$15,000.00
Travel/Trade Shows	\$8,000.00	0.74%		\$8,000.00
Visitor Services	\$80,000.00	7.41%		\$80,000.00
Website Development (Online, Website, Mobile)	\$55,583.20	5.15%		\$55,583.20
Earned Media/Tourism Sales	\$80,000.00	7.41%		\$80,000.00
<b>TOTAL LFUT Budget</b>	<b>\$1,019,479.00</b>	<b>94.40%</b>	<b>\$0.00</b>	<b>\$1,019,479.00</b>

<b>Lodging Facility SALES Tax (LFST) Budget</b>	<b>\$60,447.00</b>			
Administration	\$12,089.40	20.00%		\$12,089.40
Research	\$20,000.00	1.85%		\$20,000.00
Paid Media	\$28,357.60	2.63%		\$28,357.60
		0.00%		\$0.00
		0.00%		\$0.00
		0.00%		\$0.00
		0.00%		\$0.00
		0.00%		\$0.00
		0.00%		\$0.00
		0.00%		\$0.00
		0.00%		\$0.00
<b>TOTAL LFST Budget</b>	<b>\$60,447.00</b>	<b>5.60%</b>	<b>\$0.00</b>	<b>\$60,447.00</b>

<b>TOTAL LFUT &amp; LFST BUDGET</b>	<b>\$1,079,926.00</b>	<b>100.00%</b>	<b>\$0.00</b>	<b>\$1,079,926.00</b>
-------------------------------------	-----------------------	----------------	---------------	-----------------------

LFST Revenue Projection	\$60,447.00
LFUT Revenue Projection	\$944,479.00
Funds not spent during previous fiscal year	\$75,000.00
LFST Rollover Funds at Commerce	\$0.00
LFUT Rollover Funds at Commerce	\$0.00
Allocated Following Audit	\$0.00
<b>Budget total</b>	<b>\$1,079,926.00</b>

:

The Narrative Evaluation report is used to a) provide a written evaluation of the Objectives and

**Metrics section and b) provide a written summary of how the LFST Funds were spent and the metric(s) achieved.:**