

A scenic landscape photograph of two hikers standing on a rocky mountain ridge. The hiker on the left is wearing a grey t-shirt and dark pants, with a backpack. The hiker on the right is wearing a maroon jacket, dark pants, and a cap, pointing towards the distance. The background shows a vast, hazy valley with rolling hills and mountains under a bright sky. The foreground is a rocky, grassy slope.

VISIT **BOZEMAN**

GALLATIN VALLEY TBID BUDGET

PRIME

FY27

The background image is a dark, atmospheric landscape of a mountain valley. In the foreground, a river flows through a valley, bordered by a dense forest of tall, dark trees. The middle ground shows a wide, open area, possibly a meadow or a dry riverbed, leading towards the base of the mountains. The background features rugged, dark mountain peaks under a sky with a few small, white clouds. The overall tone is dark and moody, with a focus on natural beauty and wilderness.

VISITATION INTELLIGENCE

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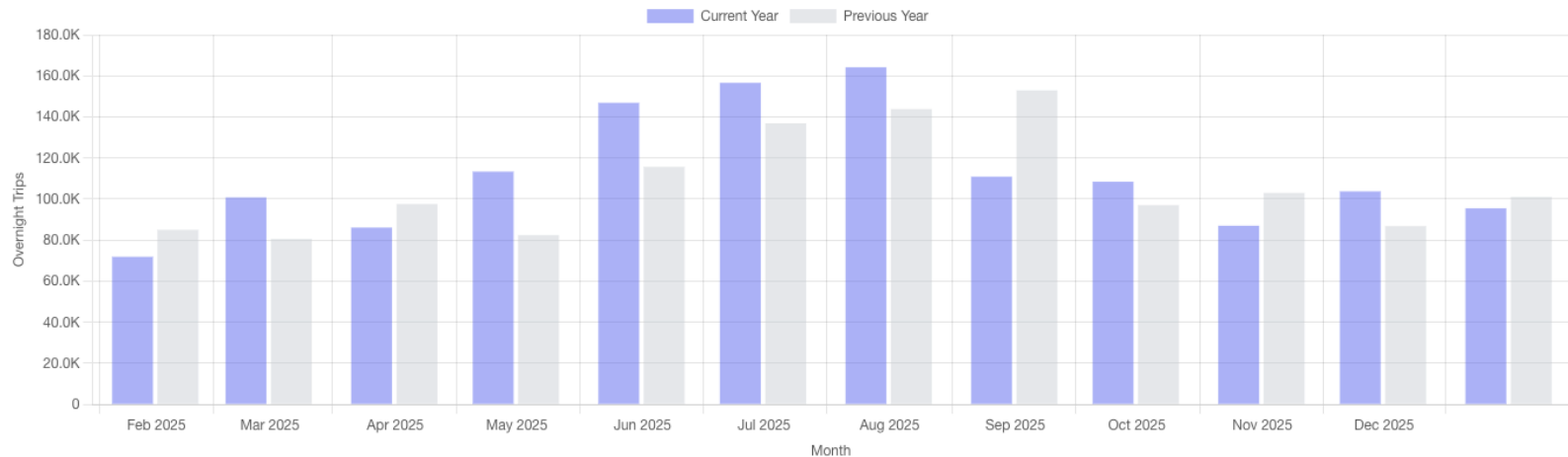
NATIONAL OVERNIGHT TRIPS

LAST 12 MONTHS – THROUGH JANUARY

Trend Analysis ⓘ

Visualize metrics over time with flexible intervals

Metric: **Overnight Trips** Distance: **50+ Miles** Time Interval: **Monthly** Chart Type: **Bar** Start: **January 2025** End: **January 2026** ☒ Compare to Previous Year



Overview Report Dates
February 2025 - January 2026

Time Period ⓘ: **Last 12 Months** Home distance ⓘ: **50+ Miles** 150+ Miles

Total Trips ↑ YoY +4.2% 1.8M vs. 1.7M prev. year (Jan '24 - Dec '24)	Avg. Monthly Visitors ↑ YoY +8.2% 129.3K vs. 119.5K prev. year (Jan '24 - Dec '24)	Visit Nights ↑ YoY +2.8% 2.9M vs. 2.8M prev. year (Jan '24 - Dec '24)	Total Visitor Spend ↓ YoY -6.2% \$331.9M vs. \$353.7M down from (Jan '24 - Dec '24)
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*DATA SOURCE: PLACER.AI

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VISITATION BY ORIGINATION

LAST 12 MONTHS BY CBSA

Visitor Origins ⓘ

Your top feeder markets by geography

Table Map

Origin Type Time Period Home Distance Trip Type Search Origin State Sort By View

CBSA Last 12 Months 50+ Miles Overnight Search... All States Trips Comparative Metrics

ORIGIN	TRIPS	AVG MONTHLY VISITORS	VISIT NIGHTS	AVG DURATION	TREND
Billings, MT	95,897	6,730	177,875	2.8 days	View
Helena, MT	59,370	3,739	110,008	2.9 days	View
Seattle-Tacoma-Bellevue, WA	55,281	4,645	129,588	3.3 days	View
Missoula, MT	43,752	3,230	86,846	3.0 days	View
Denver-Aurora-Lakewood, CO	43,014	3,549	114,606	3.7 days	View
Great Falls, MT	36,199	2,563	72,967	3.0 days	View
Kalispell, MT	35,244	2,694	79,585	3.2 days	View
Minneapolis-St. Paul-Bloomington, MN-WI	29,339	2,603	71,224	3.4 days	View
Los Angeles-Long Beach-Anaheim, CA	26,511	2,220	67,899	3.6 days	View

LODGING DATA

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BOZEMAN/BELGRADE HOTEL ROOMS

DATA THROUGH FEBRUARY

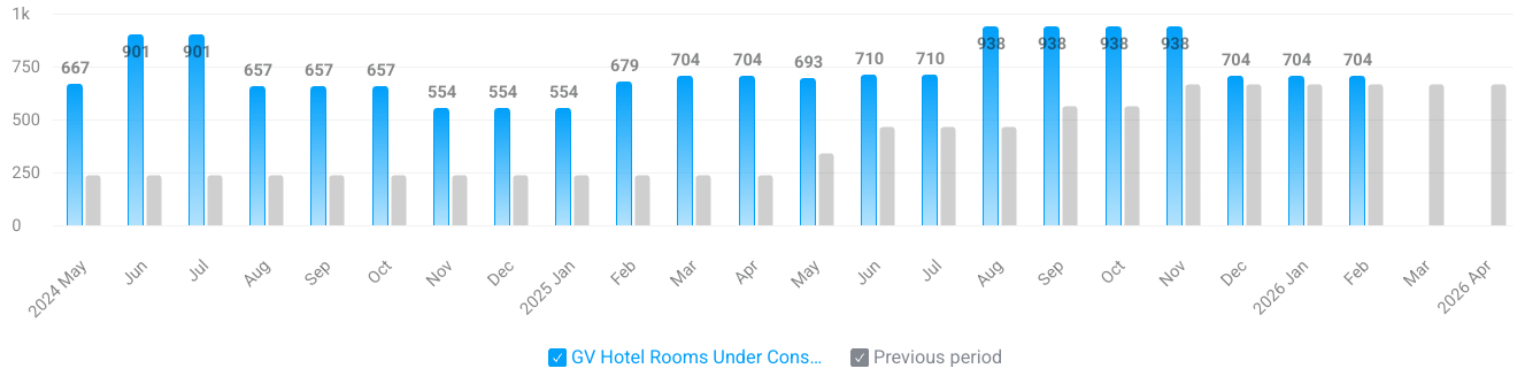
Mar 26, 2025 - Mar 25, 2026 (rolling)

New Rooms in the Last 12 Months

554

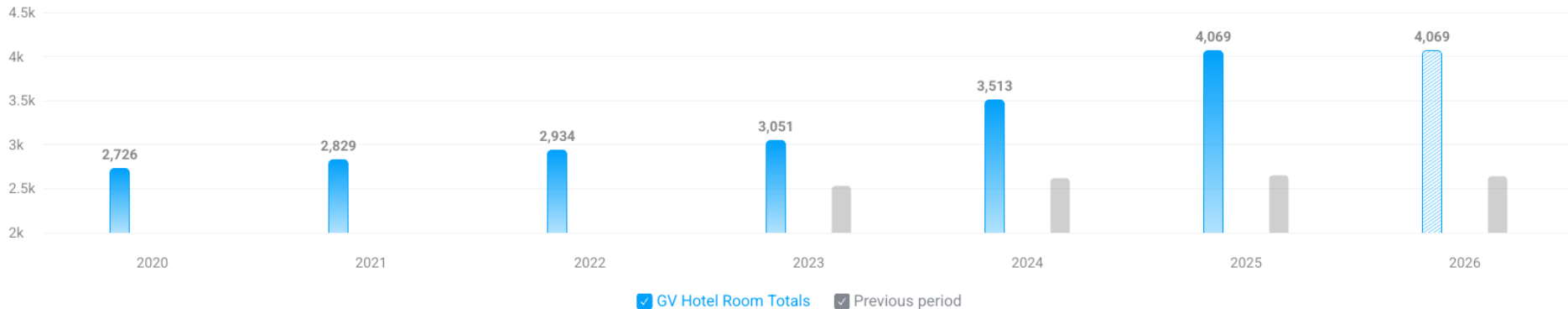
Last 24 months (2024 May - 2026 Apr)

Gallatin Valley Hotel Rooms Under Construction



Last 7 years (2020 - 2026)

Gallatin Valley Hotel Room Totals

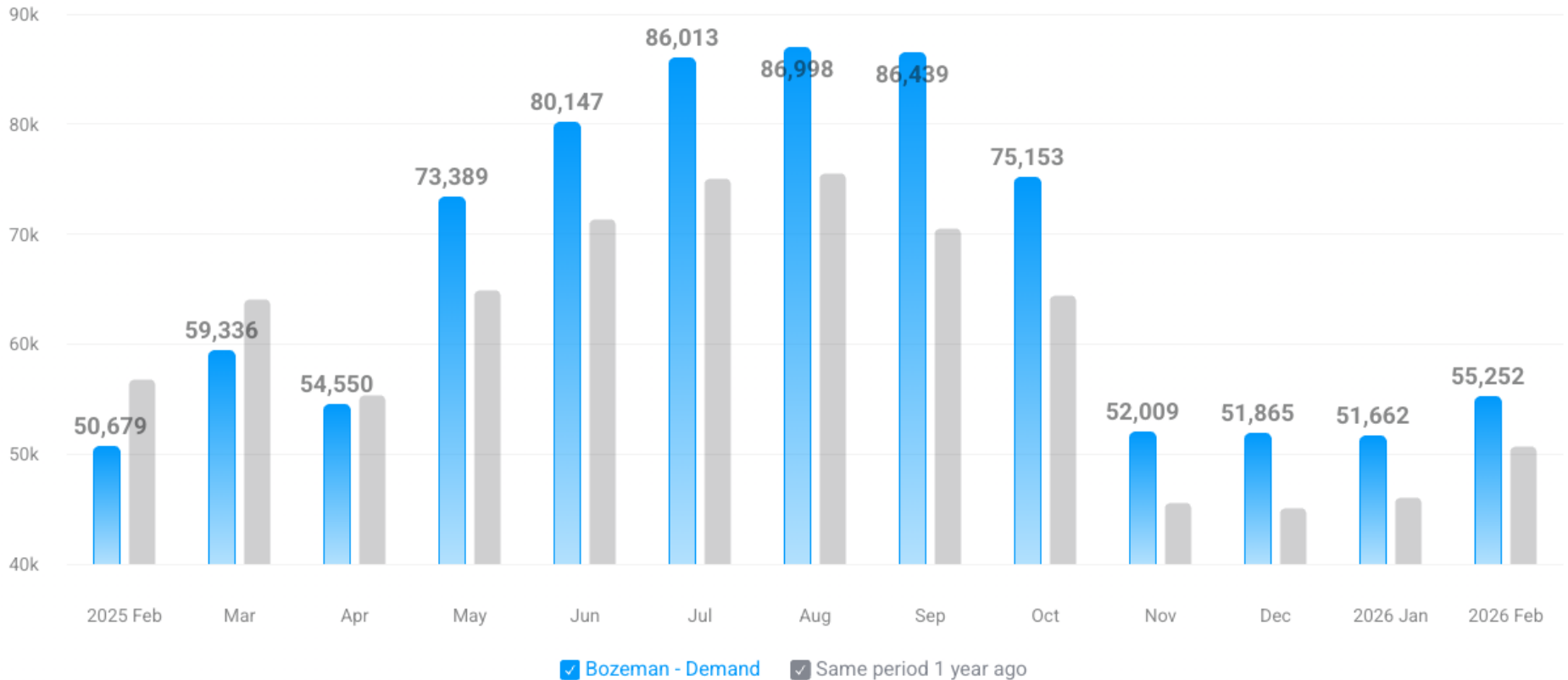


LODGING DEMAND

COSTAR

Last 13 months (2025 Feb - 2026 Feb)

13 MONTH HOTEL - DEMAND

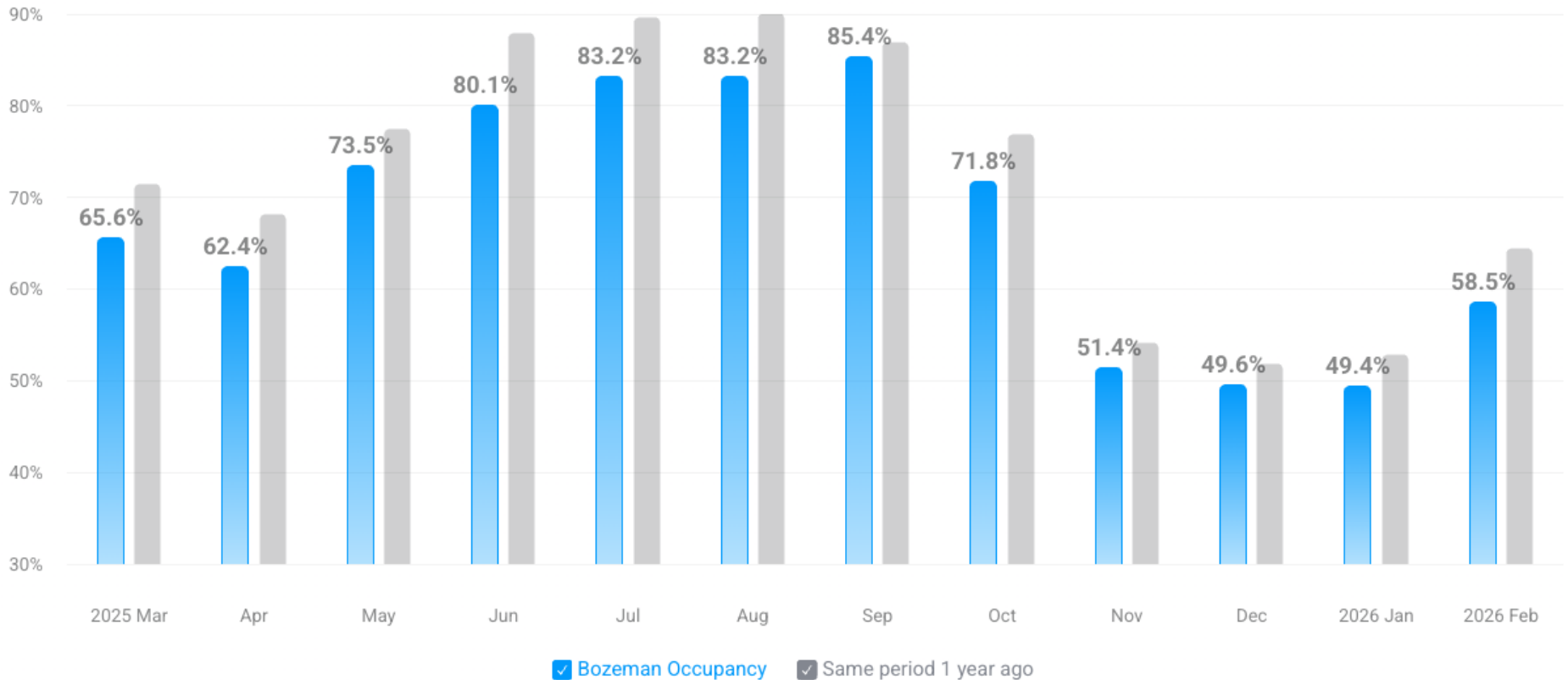


BOZEMAN OCCUPANCY

LAST 12 MONTHS

Last 12 months (2025 Mar - 2026 Feb)

12 MONTH BOZEMAN HOTELS - OCCUPANCY

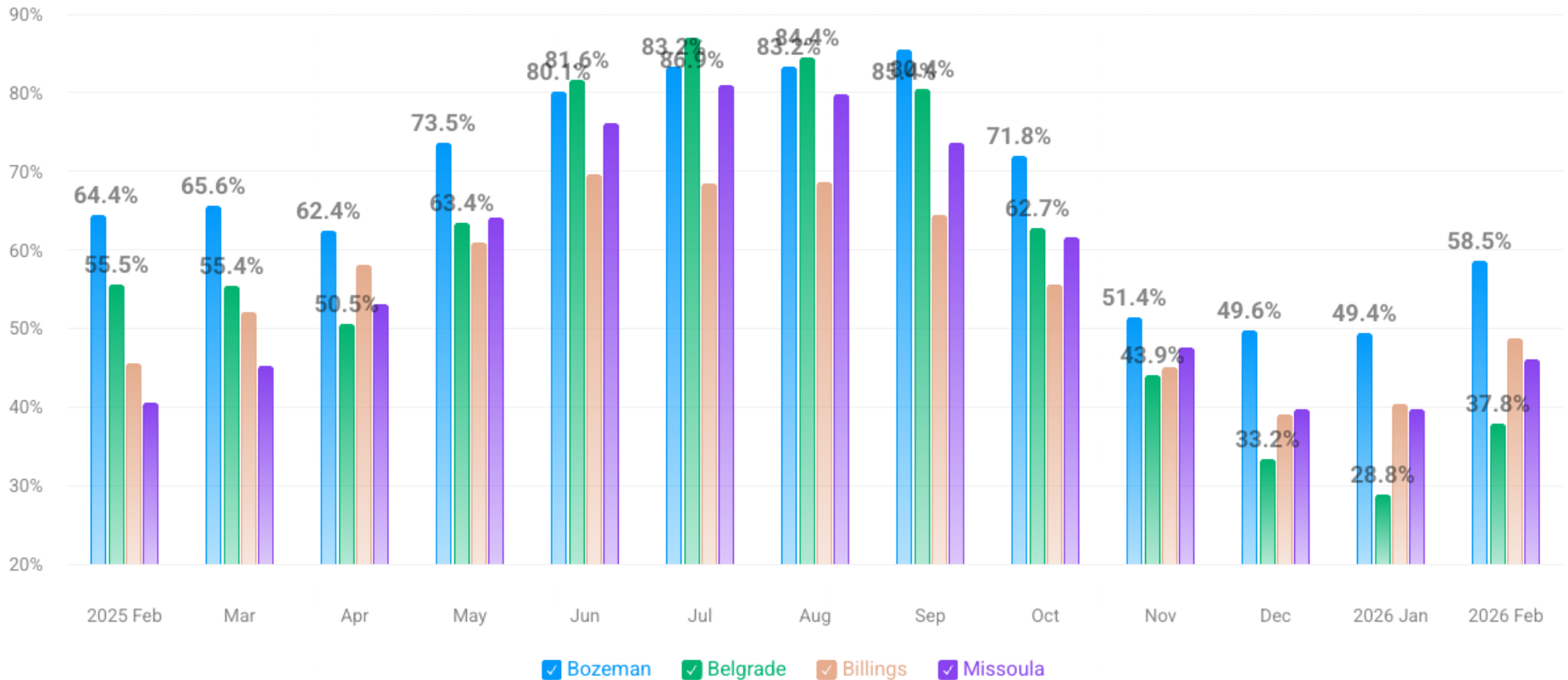


HOTEL OCCUPANCY

LAST 13 MONTHS

Last 13 months (2025 Feb - 2026 Feb)

13 MONTH HOTEL RESULTS - OCCUPANCY

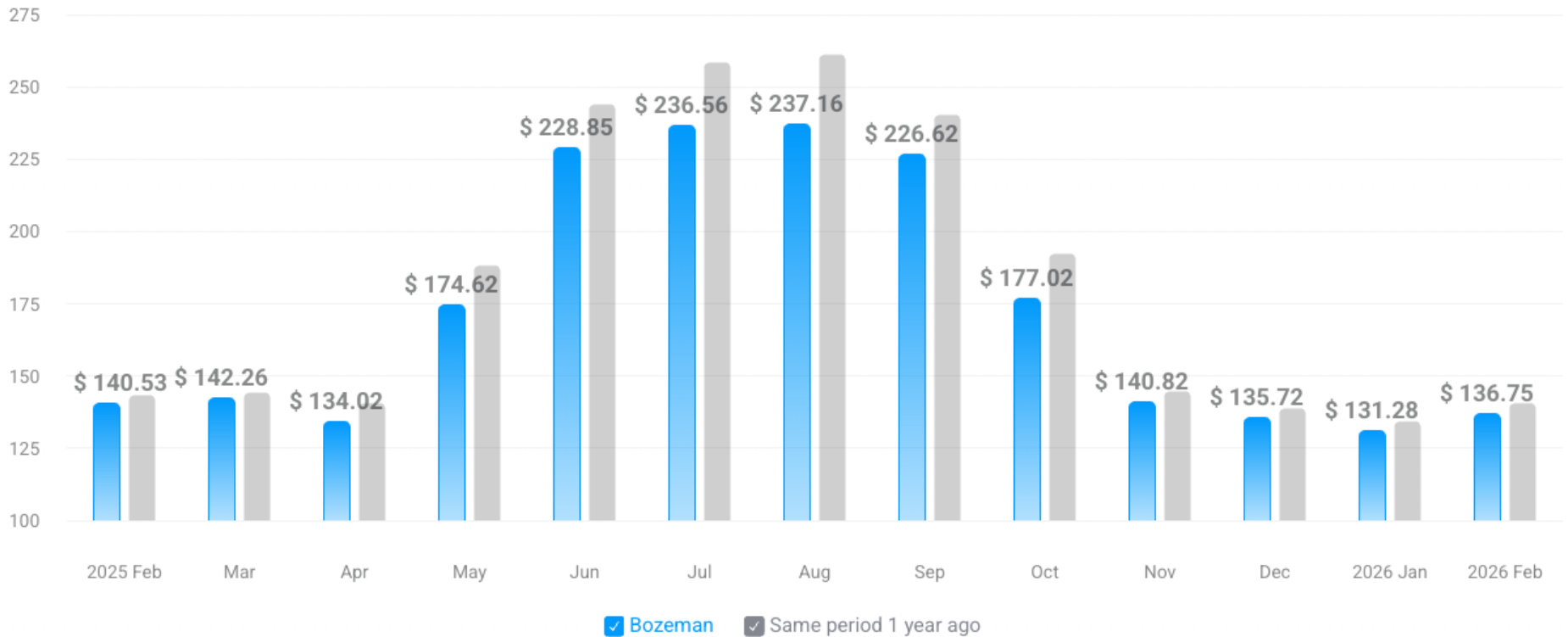


HOTEL ADR

LAST 13 MONTHS

Last 13 months (2025 Feb - 2026 Feb)

13 MONTH HOTEL RESULTS - ADR

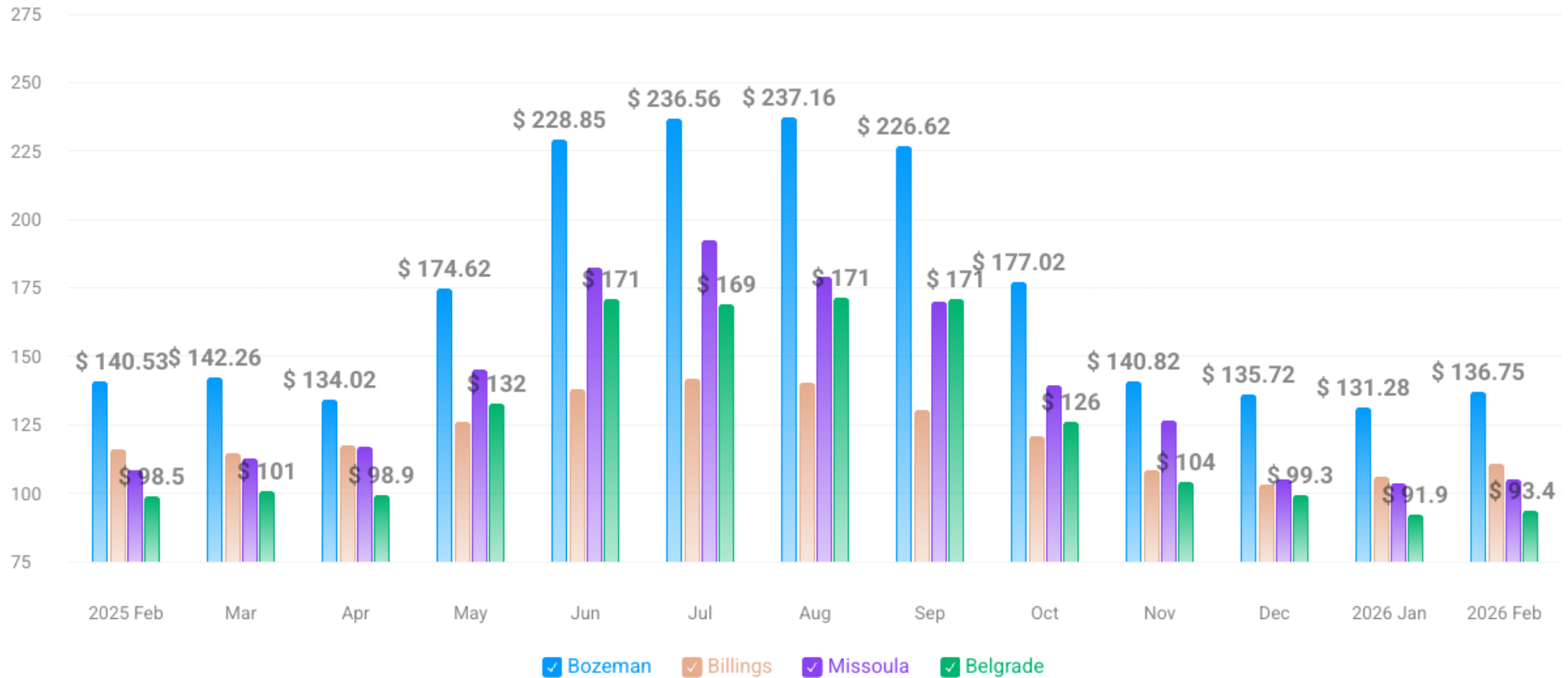


HOTEL ADR

LAST 13 MONTHS

Last 13 months (2025 Feb - 2026 Feb)

13 MONTH HOTEL RESULTS - ADR

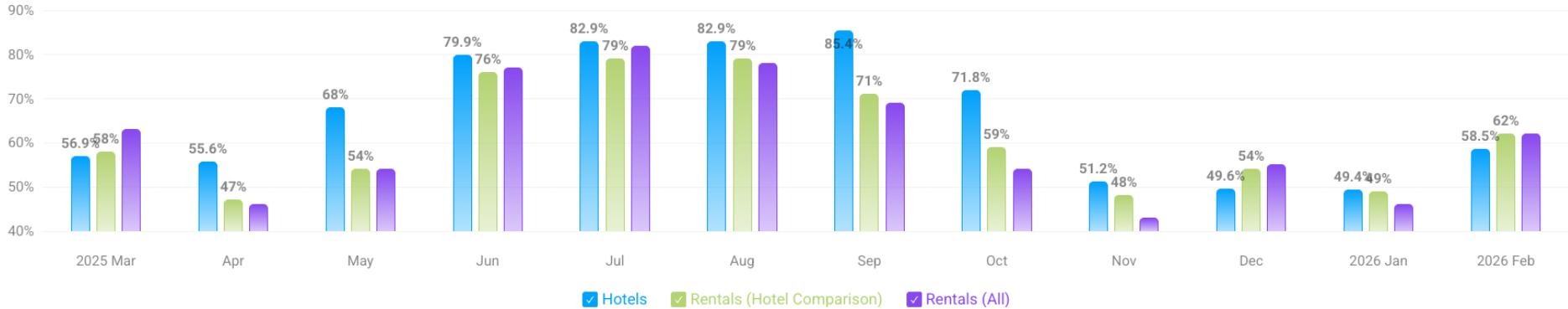


HOTELS vs. SHORT TERM RENTALS

LAST 12 MONTHS

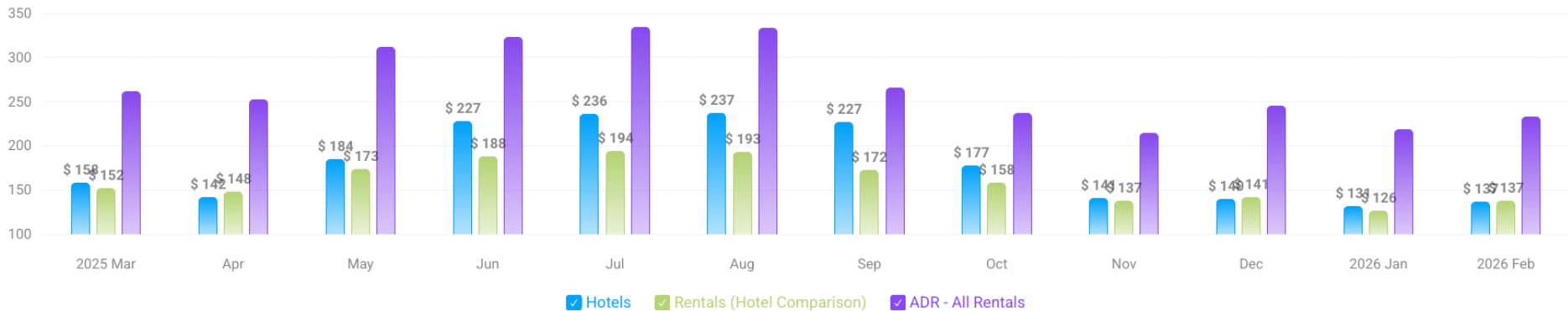
Last 12 months (2025 Mar - 2026 Feb)

OCCUPANCY RATE



Last 12 months (2025 Mar - 2026 Feb)

ADR



FY27 PLANNING



FY27 OPPORTUNITIES

THE GALLATIN VALLEY TBID IS FOCUSED ON STRENGTHENING AND SUSTAINING TOURISM THROUGH BETTER ALIGNMENT OF TBID RESOURCES, DEDICATED STAFFING, AND A CLEAR STRATEGIC PLAN. KEY PRIORITIES INCLUDE EXPANDING MEETINGS AND GROUP TRAVEL, INCREASING AIR SERVICE AND MARKETING REACH, AND IMPROVING FINANCIAL STABILITY BY BUILDING A RESERVE FUND.

- ALIGN DMO AND TBID RESOURCES TO PROTECT TOURISM FUNDING AND MAXIMIZE IMPACT
- RESTRUCTURE TOURISM DIVISION AND HIRE STAFF DEDICATED TO TOURISM
- EXPAND MEETINGS, EVENTS, AND GROUP TRAVEL OPPORTUNITIES
- LEVERAGE FUNDING TO GROW AIR SERVICE AND MARKETING REACH
- CREATE RESERVE FUND TO ELIMINATE NEED FOR LINE OF CREDIT
- DEVELOP STRATEGIC PLAN

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FY27 CHALLENGES

BOZEMAN IS FACING PRESSURE FROM RAPID HOTEL GROWTH OUTPACING DEMAND, CONTRIBUTING TO DECLINES IN KEY LODGING METRICS. DEMAND REMAINS HIGHLY SEASONAL AND SENSITIVE TO EXTERNAL FACTORS LIKE WEATHER, THE ECONOMY, AND AIR ACCESS. WORKFORCE AND INFRASTRUCTURE CONSTRAINTS FURTHER LIMIT GROWTH.

- HOTEL SUPPLY IS OUTPACING DEMAND, IMPACTING OCCUPANCY AND RATES
- RELIANCE ON LEISURE TRAVEL DRIVES STRONG SUMMER PEAKS BUT WEAK SHOULDER AND WINTER DEMAND
- LIMITED MEETING AND SPORTS INFRASTRUCTURE RESTRICTS GROUP BUSINESS
- WORKFORCE SHORTAGES AFFECT OPERATIONS AND SERVICE LEVELS
- EXTERNAL FACTORS LIKE WEATHER, ECONOMY, AND SENTIMENT ADD UNCERTAINTY



GEOGRAPHIC TARGETS:

NATIONAL CAMPAIGN GEOGRAPHIC TARGETS

- SEATTLE
- DENVER
- LOS ANGELES
- MINNEAPOLIS
- NYC

REGIONAL CAMPAIGN GEOGRAPHIC TARGETS

- BILLINGS
- MISSOULA
- GREAT FALLS
- SLC
- BOISE
- SPOKANE
- HELENA
- IDAHO FALLS

ALIGNING WITH MONTANA

BRAND MESSAGING PILLARS:

OUTDOOR ACTIVITIES

- ACCESS TO YNP & NATIONAL FOREST
- THOUSANDS OF MILES OF TRAILS
- TWO SKI AREAS WITHIN AN HOUR

BUSTLING DOWNTOWN

- RESTAURANTS, BREWERIES, AND NIGHTLIFE
- TRENDY, LOCAL RETAIL
- WALKABLE DOWNTOWN

EASE OF TRAVEL

- DIRECT FLIGHTS/AIRPORT
- MINIMAL TRAFFIC AND EASY, SCENIC DRIVES
- LARGE VARIETY OF LODGING OPTIONS

VISIT BOZEMAN'S BRAND IS IN ALIGNMENT WITH THE STATE OF MONTANA'S BRAND FOCUSING ON THE PEOPLE, THE PLACE AND THE STORIES THAT MAKE MONTANA WHAT IT IS.

FY27 TBID OBJECTIVES

- **GOAL 1:** PROTECT TOURISM FUNDING
- **GOAL 2:** RESTRUCTURE TOURISM DIVISION & HIRE FULL-TIME STAFF
- **GOAL 3:** INCREASE AIR SERVICE SUPPORT THROUGH MINIMUM REVENUE GUARANTEES AND MARKETING MATCHING FUNDS
- **GOAL 4:** BUILD UP RESERVE FUND, CREATING FINANCIAL STABILITY
- **GOAL 5:** DEVELOP THE VISIT BOZEMAN STRATEGIC PLAN

FY27 BUDGET

Ordinary Income/Expense				FY27 - \$4/Night
	Income			
		Gallatin Valley TBID Collection		
		Bozeman District		\$2,600,000.00
		Belgrade District		\$457,684.00
		Three Fork District		\$32,000.00
		Gallatin Valley TBID Collection - Other		
		Gallatin Valley TBID Collection		\$3,089,684.00
	Total Income			\$3,089,684.00
	Bozeman Expense			
		Business Expenses		\$6,500.00
		Admin & Contract Services		\$509,500.00
		Advertising		\$567,500.00
		Marketing Support		\$407,656.00
		Grant Programs		\$480,000.00
		Air Transportation Support		\$427,000.00
		Insurance & Other Expenses		\$3,000.00
		Community Engagement		\$143,000.00
		Travel and Meetings		\$45,000.00
	Sub Total			\$2,589,156.00
	Bozeman NET			\$10,844.00
	Belgrade Expense			
		Business Expenses		\$4,250.00
		Admin & Contract Services		\$32,000.00
		Advertising		\$120,934.00
		Marketing Support		\$130,500.00
		Grant Programs		\$170,000.00
	Sub Total			\$457,684.00
	Belgrade NET			\$0.00
	Three Forks Expense			
		Grant Programs		\$32,000.00
	Sub Total			\$32,000.00
	Three Forks NET			\$0.00



THANK YOU!

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