

# Central Montana

## Regional Tourism Resilience Plan

July 2022 - December 2023

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## LETTER FROM REGIONAL DIRECTOR

Dear Partners,

We are proud to present this Tourism Resiliency Plan in coordination with the Montana Department of Commerce and the Coraggio Group. As an emerging destination, we as the Central Montana region embrace the core values of destination stewardship and resilience. This plan helped us identify our strengths, weaknesses, and points of opportunity to improve both the visitor and resident experiences in Central Montana. This plan is just one of six regional plans across our great state, as well as a statewide plan that not only complements our regional plan but enhances it.

With tourism success, comes responsibility to our communities and residents. Since the COVID-19 pandemic, it is clear how much tourism can immensely benefit our region, but when done proactively and right. Through the planning process we learned how to celebrate the positive impacts but also mitigate the pinch points. Through extensive stakeholder outreach, research, and reflection, we know that this plan is practical, future forward, and self-aware, which will help us collectively build tourism and community resilience.

In this plan, you will learn about the goals and origins of how this process came about, who was involved, and the goals set at the beginning of this process. There are detailed imperatives with comprehensive timelines for implementation to hold us as region accountable to our goals and changes that we seek. In addition, you will learn about the resiliency framework utilized in our regional evaluation. The assessment was vital to understanding our tourism industry through a comprehensive and intersectional lens.

We would like to take this opportunity to thank all of the people who participated in this planning process. From listening sessions to interviews to surveys, your input has been invaluable and informative to the creation of these imperatives. Your participation and ongoing commitment to your community does not go unnoticed. Thank you for shaping the future of Central Montana.

We also thank our partners at the Coraggio Group for facilitating this process, along with Destination Analysts, Clarity of Place, and Dr. Kelly Bricker.

This plan would not have been possible with the Montana Department of Commerce. Their generous support of ARPA funding to undertake this massive project was much needed and we are grateful for their support in this process.

Now we get to roll up our sleeves and get to work. We are committed to seeing this plan through and embracing the change, effort, and collaboration it deserves. We look forward to driving this plan to practice with you and hope to enjoy the journey along the way.

Thank you all for your great support and partnership.



# Acknowledgements

## Regional Organizations and Stakeholders:

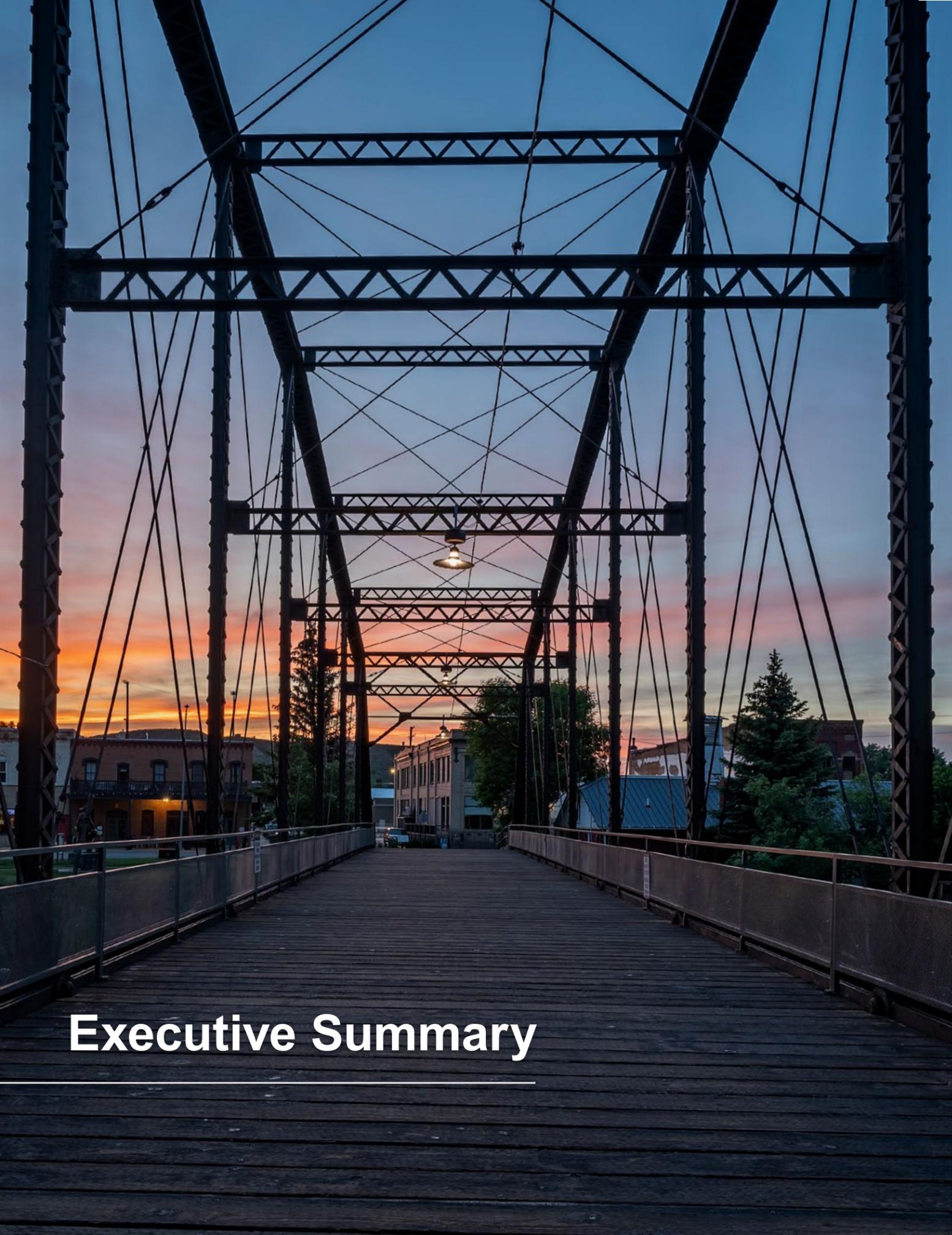
- CMT Tourism
- Montana Fish, Wildlife & Parks
- Town Pump
- Snowy Mountain Economic Development
- Grow Great Falls
- Independence Bank
- Visit Great Falls Executive Director
- Chamber of Commerce
- Bear Paw Development Corporation
- Fergus County Commissioner
- Little Shell Chippewa Tribe
- Missouri River Outfitters

## Consultant Team:

- Coraggio Group
- Specialized Contributions by Destination Analysts and Clarity of Place
- GSTC Assessment - Kelly Bricker

## GF Planning Team:

- James Cooler
- Pat Doyle
- Joan Kronebusch
- Abbey Majerus
- Brett Doney
- Becky Miller
- Rebecca Engum
- Jessica Faugerbakke
- Julea Robbins
- Jennifer Saunders
- Nicolle Fugere



# Executive Summary

Tourism in Central Montana is an increasingly important economic driver for the region. Like visitors to Montana as a whole, visitors to Central Montana are highly motivated by being outside and trying new things. They are also conservation-minded and want to benefit the local economy; they are more likely than visitors to other regions to focus on minimizing their carbon footprint and choosing experiences that focus on sustainability, as well as prioritize hiring a local guide and supporting minority-owned businesses.

In terms of specific attractions, visitors to Central Montana are motivated by visiting National Parks, visiting friends or relatives, visiting historic sites, and participating in specific activities like fishing and skiing. Their top activities are local dining, visiting National Parks, shopping at boutiques and local artisans, shopping at malls and national brands (35%) and visiting State Parks.

While Central Montana grows as a destination, residents of the region want to maintain their quality of life and culture. Residents and visitors alike want a thoughtful plan for how to best utilize and protect the beautiful land and resources that make Central Montana a beautiful place to explore.

*The recommendations below represent the culmination of multiple research studies, stakeholder interviews, surveys, and town hall meetings. No single organization can accomplish all the goals and challenges outlined in this plan. However, collaborative action across agencies and stakeholder groups can have a lasting and positive impact on destination resilience, safeguarding Central Montana's destination for future generations.*

## TIMELINE

### CENTRAL MONTANA TIMELINE

- Town Hall: **January 23**
- Planning Session 1: **July 14**
- Planning Session 2: **July 28**
- Planning Session 3: **August 11**
- Planning Session 4: **August 25**
- Planning Session 5: **September 6**

## FRAMEWORK *how/when/what (in situation assessment)*

The purpose of this plan development was to gather insights on the current state of the Central Montana region's tourism industry, identify current and emerging opportunities and challenges facing the destination, and provide a set of recommendations to improve destination resilience in Central Montana. The following research and data analysis was performed and informs the imperatives in this plan.

- Reviewed and analyzed the available industry, visitor, and tourism economic impact data provided by Central Montana and available online.
- Reviewed existing strategic plans, master plans, and development initiatives from other tourism-adjacent organizations, city and municipal departments, and transportation authorities, with a focus on those pertaining to tourism, economic development, outdoor recreation and conservation, and infrastructure.
- Administered a stakeholder survey to capture tourism and tourism-adjacent stakeholder perceptions of the region's assets, support structures, challenges and opportunities, and relationship to BrandMT. (Appendix 2)
- Administered a Destination Resilience Assessment to highlight resilience gaps for action within the region. (Destination Resilience Assessment)
- Administered a visitor profile survey to understand the demographics and motivations of visitors to Central Montana. (DA Visitor Profile)
- Administered a resident sentiment survey to understand resident attitudes toward tourism and the industry's impact on their quality of life. (DA Resident Sentiment)
- Analyzed mobile device geolocation data to understand visitor dispersion among the region's counties, attractions, parks, and airports. (DA Mobile Device Geolocation Dashboard)
- Conducted an Asset and Infrastructure Assessment to inform destination resilience opportunities. (CoP Assessment and Inventory)
- Conducted the Global Sustainable Tourism Council (GSTC) Assessment to identify risk areas and opportunities for greater destination sustainability. (GSTC Assessment)
- Gathered stakeholder opinions and perspectives via focus groups and interviews.

Coraggio began this work by facilitating an initial immersion session with BrandMT, followed by conducting external research and review of documents and data provided by BrandMT, Central Montana's regional leadership, and the region's tourism organizations. Coraggio partnered with Destination Analysts for the Visitor Profile Survey, Resident Sentiment Survey, and Mobile Device Geolocation Data, with Clarity of Place for the Asset and Infrastructure Assessment, and with the Global Sustainable Tourism Council for the GSTC Assessment. The results of this research are highlighted at the start of this report in an executive summary of tourism resiliency recommendations for each of the seven dimensions of tourism resiliency. This is followed by a series of chapters on each dimension of resilience, outlining the most relevant insights and data leading to these recommendations.

### Summary of Stakeholder Engagement Activities and Numbers

- Focus Groups **3**
- Interviews with Central Montana Tourism Stakeholders **6**
- Destination Resilience Assessment Survey Responses **6**
- Tourism Stakeholder Survey Responses **61**

### Statewide Numbers

- Regional Focus Groups **24**
- Interviews with Statewide and Regional Tourism Stakeholders **41**
- Destination Resilience Assessment Survey Responses **30** at the state level, **40** at the regional level
- Tourism Stakeholder Survey Responses **312**
- Regional Planning Session participants **73**
- Online survey participants **2,196**

## RESILIENCY PRINCIPLES *(in situation assessment, introduction of icons)*

When evaluating destination resilience, we examine the magnitude of risk and degree to which the destination ecosystem is vulnerable to a wide variety of internal and external disruption scenarios. A destination's resilience is assessed as a measure of its collective capacity to anticipate disruptions before they happen and understand the wide variety of likely impacts upon the broader destination ecosystem effectively respond to disruptions in real time rebound and adapt strategically to a post-disruption environment.

Insights from Coraggio's Resilience Assessment identify specific opportunities for destinations to proactively prioritize strategic initiatives that reduce vulnerability to disruption, thereby improving community and organizational preparedness and ensuring greater balance in tourism's positive impact.

The assessment includes more than 100 questions that gauge a variety of measures of resilience capacity across seven pillars of destination management, including but not limited to:



**Leadership:** trust, vision, communication, delegation and power sharing, risk tolerance and mitigation, influencer engagement, and collaboration among entities involved in tourism governance



**Team and Talent:** organizational culture and values, team engagement, innovation, capacity, bench strength, workforce sufficiency, and skills



**Stakeholders and Community:** diversity and variety of partners, types and depth of collaboration, stakeholder awareness, stakeholder sentiment, stakeholder engagement, and level of support



**Visitors:** audience demographic diversification, geographic origin markets, activities and experiences of interest, visitor management capabilities and systems, visitor research and data collection, visitor sentiment, and access & accessibility to key experiences



**Infrastructure and Assets:** infrastructure (transportation, communication, energy, management systems, technology, etc.), environmental impact, asset connectivity, accessibility, maintenance, community amenities, and natural resources



**Marketing & Communications:** diversification of channels, campaign/program risk tolerance, marketing/communications budget flexibility, crisis readiness, brand consistency across geographies and at times of change, and relatability to a variety of audiences



**Funding:** diversification of funding sources, flexibility of funding allocation, versatility of funding structures, and scope/limitations of funding utilization

# Imperatives, Objectives and Initiatives

Approach, Partners and Resources

## COMMUNITY PARTNERS

Short term rental properties, Lodging properties, Health Dept, Dining , retail, and drinking establishments, American Prairie Reserve, Events, sports and Festival organizations and planners, Group travel planners, Commerce Department and other state partners, RV Parks, Economic Development agencies, Rural fire and rescue, Hospitals, Chambers of Commerce, Local and Montana legislative representatives, Main Street MT groups, cultural attractions and museums, School districts, Great Falls and Havre CVBs, Private land owners, TBIDs, Department of Transportation, Rail authority, and airports, Fish, wildlife and parks, Law enforcement, US Military, County/city administrators and elected officials, Forest Services, Border Patrol, Tribal representation, Theatre, dance, and other arts companies, Independent trail orgs, Colleges and Higher Ed, local influential independent groups and clubs, Outfitters, guides, HRDC and job service, Tour operators, Campgrounds, Historic preservation organizations. Entertainment venues, HUD, Real estate developers

## IMPERATIVE 1

Increase stakeholder engagement to enhance the positive impact of tourism in the region.

- OBJECTIVES
- Increase in # of partners who collaborate with Central MT
  - Year-over-year increase in businesses and resident satisfaction survey results
  - Increase in stakeholder database
  - Increase resident and business community awareness of tourism benefits, impacts

STRATEGIES	Strengthen alignment and collaboration with the Commerce Department to create a web of relationships and communication	Increase regional efficiencies through shared resources	Support, protect, and enhance the diverse culture and heritage of the region	Identify, expand, and deepen stakeholder engagement and collaboration
INITIATIVES	<p>Strengthen state engagement by staying informed about state developments and fostering greater collaboration between the state and central MT region</p> <p>Expand the region's capacity for environmental risk evaluation and data collection—potentially partnering with Brand MT or other third parties to access broader resource— and responding appropriately.</p> <p>Improve the sharing and accessibility of marketing materials between the state and region</p>	<p>Optimize the coordination of media schedules and strategies between the state and Central MT</p> <p>Develop standard operating procedures for tourism organizations, including to facilitate succession planning</p> <p>Amplify Central Montana's message so local communities and businesses can capitalize on the brand and marketing channels through partnerships and collaborative efforts.</p> <p>Create a recommended list of partners available for marketing, media, and training assistance</p>	<p>Proactively ensure that growth is intentional and preserves the culture and heritage of the region by identifying clear growth objectives in collaboration with local and regional government, residents, and other local stakeholders. (3e, 3g)</p> <p>Preserve the region's agricultural history and heritage while identifying ways to provide access to and promote this unique cultural offering to potential visitors. (3f, 3g)</p> <p>Collaborate with connected partners to build education campaigns to set behavioral expectations for visitors and residents to encourage respectful interactions and stewardship of the natural environment and full-time residents. (3k, 3l)</p>	<p>Nurture relationships with business owners and populations from historically disadvantaged groups in the region and co-create opportunities to engage in discussions and decisions that affect businesses in the region. (3d)</p> <p>Work with Glacier and Yellowstone-bound visitors to increase awareness of and travel to Central region</p> <p>Help stakeholders build digital/online presence (chamber and EDC assistance)</p> <p>Connect and foster partnerships between tourism industry stakeholders and local government. (3h, 3i)</p> <p>Create additional opportunities to highlight and/or incentivize investment in locally owned businesses</p>

## IMPERATIVE 2

Increase traveler awareness of and visitation to Central Montana through marketing and public relations.

### OBJECTIVES

- Increase in total visitation
- Increase # of visitors to promoted communities through itineraries
- Increase traveler Net Promoter Score
- Increase shoulder season and off-season visitation

STRATEGIES	Expand awareness of regional assets, experiences, and opportunities	Foster local pride and interest in tourism and sites in region
INITIATIVES	<p>Form a shared database of tourism assets and contacts (current, emerging, and potential) to share with tourism stakeholders region-wide</p> <p>Leverage interest in outdoor recreation to motivate travel beyond high-visitation assets and visitor opportunities</p> <p>Pursue opportunities to reach out to younger visitors through innovative marketing effort</p> <p>Invest in the expansion of data collection as it pertains to tourism across the region</p>	<p>Design and deploy a resident engagement and communication plan that may include a resident sentiment survey or public forums where residents can voice concerns and/or support for the visitor economy's impacts on their quality of life. (3n)</p> <p>Ensure that the benefits from tourism and its future development in the region are equitably distributed throughout the year, across the region, and among all communities within Central Montana, including Indigenous communities. (3a, 3b, 3c, 3d)</p>

## IMPERATIVE 3

Support workforce development efforts to increase the region's capacity for visitation.

### OBJECTIVES

- Increase Employee retention in tourism businesses
- Increase in the # of tourism-related jobs
- Increase in # of workforce trainings
- Increase # of tourism ambassadors

STRATEGIES	Support the development of Workforce education and training	Enhance perception of and quality of hospitality industry careers
INITIATIVES	<p>Create vav customer service ambassador/training program, which includes field trips or guides for hospitality workers to understand destinations</p> <p>Expand workforce research capabilities</p> <p>Build destination ambassadorship programs that center on customer service/ambassador training utilizing field trips and guides for hospitality workers and tourism partners to understand destinations. (2j)</p> <p>Strengthen and leverage the existing relationship between training and education providers and the tourism industry to develop tourism-specific regional workforce development programs that are tailored to training a highly seasonal workforce. (2b, 2i)</p>	<p>Develop programs and strategies to smooth out seasonal tourism fluctuations to improve workforce sustainability. (2a, 2c, 2d, 2e)</p> <p>Create opportunities to appreciate and highlight tourism industry careers. (2g, 2h)</p> <p>Develop opportunities for and encourage youth to get involved in local tourism</p> <p>Work with key partners to better understand workforce needs within the region and lend support to ensure high-quality talent is attracted.</p>

# IMPERATIVE 4

Enhance the visitor experience through continued destination development and management.

## OBJECTIVES

- Increase usage of targeted newly-accessible assets
- Increase in tourism assets/attractions
- % completion of wayfinding plan
- Increase in the # of available rooms by community

STRATEGIES	Diversify visitor types and experiences	Improve accessibility throughout the region	Advocate for and facilitate investment in essential infrastructure	Pursue and support product development	Expand region's lodging capacity, quality and diversity
INITIATIVES	Create regional itineraries based on different interests (military, history, outdoor rec)	Continue advocating for extended border openings to increase Canadian visitation opportunities. Consider collaborating with US Travel to accomplish this. (4o)	Support efforts to expand Wifi, broadband, cell coverage across region	Facilitate and support property owners seeking licensing and development of onsite experiences, e.g. tourism and work stays	Advocate for and support the increase of lodging and accommodation quality throughout the region and increase quantity of options in smaller communities. (5h)
	Expand channels and approaches to attract greater variety of audiences	Provide resources and support to community efforts to increase accessibility	Support the rollout of the statewide Electric Vehicle Infrastructure Deployment Plan and advocate for locating charging stations near areas that see high visitor volumes. (5k)	Convene tourism and agricultural industry stakeholders to explore connections between agricultural products and potential tourism experiences. (6b)	Investigate the benefits and downsides of increased short-term rentals in the region and advocate accordingly
	Establish wayfinding infrastructure linking itineraries across the region. (4a, 4f)	Advocate for and invest in public transportation initiatives that aim to improve accessibility to and within the region. (5c, 5d, 5e)	Advocate for and support existing plans for constructing and maintaining an adequate affordable housing supply for the region's hospitality workforce and a plan to handle the seasonal demands for workforce housing. (5a, 5b)		Investigate the viability of expanding campgrounds in the region
	Identify and address gaps in access to key visitor experiences. (4j)		Explore increase in quantity and quality of rest areas and mid-point experiences		
	Advocate for enhancement or development of family-friendly destination assets		Pursue and support funding and advocacy for additional indoor recreation spaces		
	Develop a signage and connectivity plan between cultural heritage sites and phases for implementation.				
	Research opportunities to disperse visitors throughout the year and beyond Cascade County. (4m, 4n)				

# IMPERATIVE 5

Guide the visitor economy to benefit stakeholders and visitors of all backgrounds.

## OBJECTIVES

- Increase staffing levels to support tourism growth
- Increase in % of open rates for communications
- Increase % of brand adoption by partners
- Year over year update to crisis and communication plan
- Increase number and diversity of new stakeholders and organizations
- Increase # of annual communication efforts

STRATEGIES	Enhance and support the brand(s) of Central Montana	Lead regional stakeholder communications efforts	Identify ways to expand funding to broadly benefit regional resilience	Increase regional emergency and crisis preparedness
INITIATIVES	Maintain an updated list of events where visitors and residents can find out about upcoming festivals, events, cultural and history events. (6i)	Increase education and communication on the impacts of legislative changes to funding	Explore partnerships to increase funding for marketing Central Montana	Support local funding efforts to increase community safety, including Rural fire & ems, search & rescue
	Expand existing marketing efforts and materials to appeal to a more diverse market, affordable travel, and the group sales segment, as well as showcasing the key assets and competitive advantages of the region. (6e, 6f, 6g)	Create a communications plan that optimizes frequency and content of communications with regional stakeholders and partners that emphasizes stakeholders' role within the regional tourism economy	Expand funding utilization for rural communities to explore agritourism opportunities, including additional funding for permits to farms/ ranches to allow for visitation and/ or activation. (7b, 7c)	Develop a regional crisis communications plan that identifies the partners to connect with that can provide insight regarding disaster response. (6c)
	Define and identify the region's brand and competitive advantage to inform priorities for marketing, communication, and management. (6a, 6b, 6g, 6m)		Collaborate with stakeholders to better align funding possibilities with potential opportunities and areas of need. (7a, 7b, 7c)	
	Communicate and represent expectations for visitors consistent with regional experience		Identify and nurture relationships with funding partners who have an interest in investing in areas outside Cascade County. (7b, 7c)	
	Hire additional Central MT staff		Explore and assess alternative industry funding models to secure greater versatility and flexibility in funding sources and uses. (7a, 7b, 7c)	
	Build relationships with local, regional, and state film offices and organizations to promote the region's appeal for filmmaking. (6g, 6h)		Explore additional funding opportunities and prioritization for building repair and maintenance. (7e)	



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