Southeast Montana

Regional Tourism Resilience Plan

July 2022 - December 2023

Prepared by Coraggio Group
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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 a beautiful destination that welcomes thousands of visitors annually, we as the Southeast 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 Southeast 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 helping shape the future of Visit Southeast Montana.

We also thank our partners at the Coraggio Group for facilitating this process, along with Destination Analysts, Clarity of Place, and Dr. 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 it's time 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 consistent support and partnership.

Acknowledgements

Executive Summary

Anchored by Montana's most populous city, Billings, the Southeast Montana region is known for its historic battlefields, outdoor recreation, and dinosaur fossils. The region is home to the Crow and Northern Cheyenne Indian Reservations and hosts significant cultural and historical events every year. Most Southeast Montana residents are supportive of tourism in their local community, citing that the local tourism industry results in a better quality of life for them and their family and more funding for community services. Southeast Montana's strong regional tourism board is helping the destination to plan for additional infrastructure to better connect visitors to key destination assets.

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 Southeast Montana's destination for future generations.

TIMELINE

SOUTHEAST MONTANA TIMELINE

- Planning Sessions 1 to 3: **July 25**
- Planning Sessions 4 to 5: **July 26**
- Planning Session 6: **August 29**

FRAMEWORK

The purpose of this plan development was to gather insights on the current state of the Southeast 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 the Southeast region. 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 Southeast 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 Destination MT. (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 Southeast 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, Southeast Montana 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 **5**
- Interviews with Southeast Montana Tourism Stakeholders **2**
- Destination Resilience Assessment Survey Responses **13**
- Tourism Stakeholder Survey Responses **77**

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

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

IMPERATIVE 1
Marketing and Communication

OBJECTIVES
- Increased engagement on social media channels
- Increased length of stay
- Increase content in shared database

STRATEGIES	Expand marketing reach and content	Focus on collaborations to increase opportunities	Leverage technology in innovative ways
INITIATIVES	Explore options for new physical marketing displays such as billboards near key attractions on highways farther out from Billings	Host pertinent Brand MT/State employees on FAM tours that showcase aspirational experiences in SEMT.	Create a landing page to educate visitors and the community on local etiquette at events
	Create creative marketing/social campaigns that lean into the East v. West/Us vs. Them divide in a playful way	Identify tour operators for mutually beneficial partnerships to better promote, link and improve key assets in the region	Use emerging technologies to engage younger generation I.e. historic battles or dinosaurs to educate and inspire by "speaking their language" of progressive technology
	Continue to develop marketing materials that showcase the entirety of SE Montana's assets	SEMT BOD to host community forums prior to official BOD meetings to exchange insights and information	Build SEMT app that allows trip building, chat and guidance from experts
	Improve current online business listings on the SE Montana website or replace w/ an alternative tool	Advocate for opportunities to partner with the state on developing additional digital marketing channels	Create a geo based, region-wide audio tour for visitors who are deaf/hard of hearing
	Campaign focuses on directing road trippers through Montana rather than Wyoming	Communicate and collaborate with other MT offices	
	Create marketing materials depicting travel groups of diverse backgrounds	Leverage partnerships within and outside of the region (i.e. SEMT and Teddy Roosevelt Library/Black Hills)	
	Build a regionwide database of image and text materials for partners	Continue the relationship building process with the Crow Tribe of Indians and the Northern Cheyenne Tribe to better facilitate their involvement in future work	

COMMUNITY PARTNERS

Chambers, Dept. Of Transportation, EDCs, BLM, NPS, NFS, Attractions (museums, cultural centers, historical sites), Restaurants/Dining/Lodging/Main Street Associations, Associations (education, Dude Ranch Assoc., Guides, Museums), Medical partners/One Health, Foundations (MT State Parks Foundation, etc.), Elected officials/bodies at all levels, FWP, BrandMT/Dept of Commerce/TAC, Tribal Governments, Partners and Event Coordinators, ITRR, Agency of Record/Vendor partners, Community colleges/higher education, MSU Extension, Historical Preservation Grants/Societies, Other Regions

IMPERATIVE 2

Destination Development

OBJECTIVES
- Number of agritourism product offerings established
- Increase in repeat visitation

STRATEGIES	Engage and activate the Southeast Region's residents and businesses in tourism development	Champion accessibility and diversity	Improve the visitor experience through capacity-building and data gathering/ dissemination
INITIATIVES	Create opportunities to allow longtime residents the ability to share local history and storytelling	Identify existing arts, culture, agritourism and heritage attractions and prioritize the development of new attractions that cater to diverse communities	Pursue nontraditional funding sources, such as private-sector partnerships, sponsorships and cooperative models
	Engage local farmers and ranchers in developing new agritourism experiences		Fund dedicated staff or programs that address destination development
	Establish a destination master plan in collaboration with the CVBs		Identify existing and new partners to help conduct and disseminate research on tourism's positive economic impacts to residents to continue increasing positive resident sentiment towards tourism
	Pursue funding sources to revitalize historical and cultural assets		Sell ads on products built with private funds
	Prioritize opportunities to improve ADA accessibility of the region's experiences and attractions		Utilize historic tax credits, maybe assist MT farmers/ranchers with another income stream via agritourism
	Support local retailers to increase visitor spending on local goods		

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IMPERATIVE 3

Community Stewardship

OBJECTIVES
- SEMT Board engagement score
- Increase in stakeholder sentiment

STRATEGIES	Support local businesses and organizations in growing the tourism economy	Community Engagement	Southeast Montana Board Development	Environmental Stewardship
INITIATIVES	Consider developing new programs or leveraging existing programs such as the Certified Tourism Ambassador (CTA) program to prepare hospitality and all outward/visitor-facing staff to better educate visitors on regional tourism assets/show excellent customer service & support recertification	Engage with the general resident population more frequently considering public forums and ongoing community sentiment research to provide an opportunity to ask questions and voice potential concerns surrounding visitor economy and impacts of visitor behaviors in their region	Work to prevent SE MT staff & BOD burnout and improve bench strength	Leverage statewide leadership on LNT education materials. Distribute materials to visitors on how they can remain respectful and culturally sensitive towards the small communities they are visiting.
	Advocate for local policies supporting small businesses and minimize economic leakage given that residents realize the importance of tourism supporting local businesses		Define the role of SEMT in the greater scope of work w/ Brand MT + Clarify expectations, rules, and relationships w/ brand MT	Implement outdoor recreation safety in stewardship education campaign contributing to initiatives within the SCORP
	Build intra-regional relationships to build trust, emergency response (understanding its capacity), and communicate the value and importance of tourism		Define SEMT's values and align board positions with the needs of the organization + Create a skills-based SEMT board recruitment matrix to map our county based recruitment strategy to ensure geographic and skill diversity + Refine the SEMT board recruitment strategy to included geographic regions as well as skills	
	Continue regular visitor surveys to identify trends and address challenges/ opportunities related to visitor economy (in progress) and share information with partners		Host one board development training workshop annually (teaching communities to be on boards, reviewing Robert's Rules of Order)	
	Identify partners in the community who can act as Visitor Information Center alternatives and are able to provide broad visitor information.		Explore avenues to expand representation on the regional and/or local tourism boards to include members from the Crow Tribe of Indians and the Northern Cheyenne tribe	
	Define role of SE MT in aiding tourism workforce development		Build social networks that connect professionally similar leaders with one another to raise region-wide tourism skillset	
	Create workshops for local businesses on techniques for tourism marketing in partnership with SE MT to attract visitors (specifically from the international market, and for organizing FAM tours)			
	Invite, listen to, and engage local tribes			
	Maximize regional opportunities provided via SB540			

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IMPERATIVE 4

Infrastructure

OBJECTIVES
- Increased signage and wayfinding
- Increase the number of letters of support for infrastructure priorities

STRATEGIES	Focus on tourism byways and visitor transportation
INITIATIVES	Continue to support the development with the Big Sky Rail Authority in securing passenger rail across the region
	Identify opportunities to continue to support the rollout of the Montana Electric Vehicle infrastructure deployment plan
	Propose a Montana-wide partnership for a cohesive region-to-state wayfinding system centered around key visitor attractions
	Assess historic and tribally relevant wayfinding and other language to a Tribal passport system
	Partner with organizations addressing gaps in the broadband and cellular service
	Partner to understand and advocate current air service gaps to improve capacity

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