

Southwest 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 an exciting destination that welcomes thousands of visitors annually, we as the Southwest 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 Southwest 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. That 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 Southwest 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:

- Montana Fish, Wildlife, and Parks
- Bureau of Land Management
- Headwaters Resource Conservation & Development Area, Inc.

Consultant Team:

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

Planning Team:

- Sarah Bannon
- Mike Johnson
- Mary Johnston
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- Jocelyn Dodge
- Katya Peterson

Executive Summary

Stunning, wild landscapes and a serene, rural lifestyle are why Southwest Montana residents feel deep pride in their home. The region is home to some of the most beautiful landscapes in the country and boasts fascinating history and culture, making the region attractive to visitors. However, risks to resident quality of life and the natural environment must be considered and addressed. Southwest Montana residents tend to express ambivalence or even hostility toward tourism, and without careful planning and management, the region is vulnerable to misuse, overuse and degradation.

Southwest Montana has developed a clear vision and a long-range plan centered on resident quality of life and collaboration with the multitude of agencies and organizations tasked with building and preserving the Southwest Montana experience. The region will continue to engage residents, building additional trust and collaboration, a critical factor in successful destination management.

The recommendations below represent the culmination of multiple research studies, stakeholder interviews, surveys, and town hall meetings. No single organization can alone accomplish all the goals and address the challenges outlined in this Situation Assessment. However, collaborative action across agencies and stakeholder groups can have a lasting and positive impact on destination resilience, safeguarding Southwest Montana as a world-class destination for future generations.

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

SOUTHWEST MONTANA TIMELINE

- Planning Sessions 1 to 3: **July 6**
- Planning Sessions 4 to 6: **September 7**

FRAMEWORK

The purpose of this plan development was to gather insights on the current state of the Southwest 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 Southwest 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 Southwest 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 Southwest 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, Southwest 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 **5**
- Interviews with Southwest Montana Tourism Stakeholders **4**
- Destination Resilience Assessment Survey Responses **8**
- 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

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

Utilize multichannel communication and marketing to improve the visitor experience and education.

- OBJECTIVES**
- Increase visitation year-over-year outside of the summer months
 - Increase the number of collaborations with local celebrities and leaders

STRATEGIES	Visitor Management	Wayfinding and Welcoming
INITIATIVES	Highlight visitor experiences beyond the outdoor draws	Connect with lifestyle brands to promote the region
	Highlight winter activities in the region	Increase information on accessibility in the region through wayfinding, signage, and online information on accessibility at different locations
	Increase communication with visitors while they are in-market	Advocate for state-sponsored visitor centers at state gateways
	Increase information and communication regarding dog-friendly places	
	Create additional visitor itineraries to spotlight attractions and food options, highlighting larger historic tours	
	Compile updated contact information for key industry stakeholders	
	Promote regional offerings to group travel; conferences, tour groups & FIT	
	Continue to promote shoulder season offerings	
	Increase SWMT's brand recognition	
	Compile relevant regional tourism events	
	Develop Crisis Management Plans to include multi-organizational communication ensuring visitor safety and awareness	
	Create additional visitor itineraries to spotlight attractions and food options, highlighting larger historic tours	
	Connect with lifestyle and local brands to promote region, i.e., Patagonia, Winston Rods, Canty Boots	

COMMUNITY PARTNERS

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

IMPERATIVE 2

Increase our workforce training and support to improve our capacity and anticipate future challenges.

OBJECTIVES

- Increase in workforce retention
- Advocate for increasing the amount of workforce housing
- Increase in the number of available tourism jobs
- Increase in the number of businesses participating in workforce trainings

STRATEGIES	Workforce Development	Workforce Retention	Workforce Housing
INITIATIVES	Create presentations on customer service and tourism job opportunities for high schoolers	Implement a rewards recognition program for tourism workers who go the extra mile	Support a plan to create a plan to address homelessness
	Create educational materials on career mobility within the tourism industry		Support the need for housing for seasonal workers
	Recruit seniors in the tourism workforce		
	Engage younger workers to increase the total workforce		

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IMPERATIVE 3

Improve regional infrastructure to further develop new and existing tourism assets.

OBJECTIVES

- Advocate the increase in the number of unique lodging offerings
- Support increase funding for historic preservation

STRATEGIES	Transportation	Diversify Lodging options	Historic Preservation
INITIATIVES	Advocate for EV charging stations adjacent to regional tourism assets	Work more collaboratively with short-term rental owners	Promote and support new Montana History Museum
	Advocate for additional air service routes for the Butte & Helena airports	Support a wider selection of motels, especially higher-end properties	Support local historic preservation efforts
	Explore collaborations with scooter and bike rentals	Explore and inventory wellness assets	Capture pertinent information of historical significance
	Advocate for additional stops in SWMT via the Big Sky Passenger Rail	Assess conference and event facilities	
	Support the development of Our Lady of the Rockies site and tram	Awareness of new product developments	
	Advocate for a shuttle service between towns in the Southwest region	Support programs stimulating product development	
	Advocate for additional stops in Southwest Montana via the Big Sky Rail		

COMMUNITY PARTNERS

Chambers, Elected officials/bodies at all levels, Dept. Of Transportation, FWP, EDCs, BrandMT/Dept of Commerce, BLM, NPS, NFS, Tribal Governments, Attractions (museums, cultural centers, historical sites), ITRR, Restaurants/Dining/Lodging/Main Street Associations

IMPERATIVE 4

Grow our organizational capacity, resources, and support through greater collaboration.

OBJECTIVES

- Increase in the number of collaborative projects with state and regional communities
- Increase in the number of interns in different tourism organizations

STRATEGIES	Increase organizational capacity	Collaborate with our partners
INITIATIVES	Seek additional funding for region-specific marketing i.e., history	Partner with public land managers to encourage participation in tourism
	Implement a strategic plan for SWMT	Support efforts by smaller communities to create TBIDs
	Create additional HR and admin support for region	Support the transfer of institutional knowledge in regional CVB/Chambers
	Create database for gathering regional assets	Increase stakeholder engagement at regional board meetings
	Hire additional regional tourism staff	Creation of cohesive local, regional and state branding
	Professional development	Develop a “State of the Region” report
	Explore health and financial benefits for regional and CVB leaders	Advocate and support recycling efforts
	Actively recruit diverse board members	Improve communication and collaboration with non-locally owned lodging priorities
	Support local chambers and their tourism related businesses	
Support assessments/surcharges to support specific tourism experiences		

COMMUNITY PARTNERS

Big Sky Passenger Rail Authority, Elected officials/bodies at all levels, Dept. Of Transportation, FWP, EDCs, BrandMT/Dept of Commerce, BLM, NPS, NFS, Tribal Governments, Electric Vehicle Authority, NEVI – EV charging stations project (federal)

IMPERATIVE 5

Increase regional collaboration to better communicate the value of tourism in positively impacting our community’s quality of life.

OBJECTIVES

- Increase number of collaborative projects with state and regional communities
- Increase resident sentiment scores regarding the importance of tourism as an economic driver in the region
- Increase the number of visits to member websites
- Increase the number of tourism education programs
- Increase and communicate member benefits

STRATEGIES	Communicate the economic benefit of tourism
INITIATIVES	Advocate for legislative recognition of tourism as an economic driver
	Expand regular communication beyond membership contact lists

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