

Yellowstone Country

Regional Tourism Resilience Plan

July 2022 - December 2023

Prepared by Coraggio Group
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LETTER FROM REGIONAL DIRECTOR

Dear Partners & Stakeholders:

Montana's Yellowstone Country tourism region is proud to present our Resiliency Strategic Plan. This plan is one of six regional plans across Montana. There is also a statewide plan, which will complement and enhance the regional plans.

We would like to take this opportunity to thank all those who participated in this strategic planning process. To those who dedicated their time to serve on the regional working group, and/or participated in the listening sessions, interviews and surveys, your input has been invaluable and informative; your participation and ongoing commitment to your community does not go unnoticed. This important work has helped to frame the future management of Montana's Yellowstone Country as a destination.

The Resiliency Plan would not have been possible without the Montana Department of Commerce dedicating ARPA funding to undertake this massive project, and we are incredibly grateful for that support. We also thank our partners at the Coraggio Group for facilitating the planning process, along with Destination Analysts, Clarity of Place, and Dr. Kelly Bricker.

Montana's Yellowstone Country region is a world-class leisure destination that welcomes millions of visitors annually, and we continue to see an increasing number of visitors. Travel & tourism can continue to benefit our region immensely when managed correctly. With tourism success comes the responsibility to our communities and residents to do our due diligence in working to protect our assets and sense of place, even as we invite travelers to the area. As the designated Destination Management Organization for south-central Montana, Yellowstone Country will utilize this plan to guide sustainability efforts through the coming years. We fully embrace the core values of destination stewardship and resilience.

The processes under which the plan was developed helped to identify our strengths, weaknesses, and points of opportunity, which will help us, and our community partners, to improve both the visitor and resident experiences in Yellowstone Country. 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.

Now is the time to roll up our sleeves and get to work! We are committed to seeing this plan through, by embracing the effort and collaboration it deserves. The Yellowstone Country team looks forward to collaborating with all our partners through this journey. Together, we'll continue striving to protect and preserve this incredible region.

Cordially,



Robin Hoover
Executive Director
Montana's Yellowstone Country



Acknowledgements



Resilience Planning Team:

- Robin Hoover
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Regional Organizations and Stakeholders:

- Northern Rockies Economic Development Council
- YPSS
- Big Sky Resort
- Red Lodge Pizza Company
- Red Lodge City Commissioners
- Park County Commissioners
- Gallatin National Forest
- MSU Department of Native American Studies
- Yellowstone Forever
- Prospera Business
- Red Lodge Area Chamber of Commerce
- Destination Yellowstone

Consultant Team:

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



Executive Summary

While Yellowstone Country has always had a strong visitation pattern, in the last few years, visitation numbers caused the region to think critically about destination management, responsible promotion, and visitor dispersal. As a highly sought-after outdoor recreation destination feeling the pressures associated with strong demand, Yellowstone Country faces opportunities and challenges in bolstering regional resilience in the face of natural and social disruptions. Regional tourism stakeholders possess robust knowledge, and desire for, destination management. Visitors and residents are highly aligned in their appreciation and desire to preserve the natural environment that makes the region so unique. However, the region's five counties struggle with an uneven distribution of visitation and economic opportunity, seasonality, and population changes that impact quality of life.

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 Yellowstone Country's world-class destination for future generations.

TIMELINE

YELLOWSTONE COUNTRY TIMELINE

- Gardiner, Montana: **October 17, 2023**
- Planning Session 1: **June 7, 2024**
- Planning Session 2: **June 21, 2024**
- Planning Session 3: **June 28, 2024**
- Planning Session 4: **July 12, 2024**
- Planning Session 5: **July 19, 2024**
- Planning Session 6: **August 2, 2024**

FRAMEWORK

Summary of Stakeholder Engagement Activities and Numbers

- Focus Groups **5**
- Interviews with Yellowstone Country Tourism Stakeholders **5**
- 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**

The purpose of this plan development was to gather insights on the current state of the Yellowstone 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 Yellowstone Country. 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 Yellowstone Country 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 Yellowstone Country. (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, Yellowstone Country 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.

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

Determine, align and deploy collective resources toward shared long-range vision and priorities.

OBJECTIVES

- Increase the percent of dollars that can be used flexibly for management and resilience activities
- Establish a set of key representative groups and measure the percent of those roles that are filled on the Board – 25% of the Board is comprised of key representative groups
- Increase the number of stakeholders who have access to needed data
- Increase the availability and frequency of data

STRATEGIES	Pursue versatile industry funding and flexibility of usage for alternatives	Ensure diverse representation across regional leadership	Establish and share data-driven regional master plan
INITIATIVES	<p>Leverage Yellowstone's leadership strength and reputation with stakeholders to develop clear short- and long-term priorities and advocate for funding and resources</p> <p>Identify financial resources, grants, and support programs to help local small businesses that are still recovering from tourism shocks (natural disasters, overuse, etc.)</p> <p>Advocate for state infrastructure funds for regional priorities and allow counties and/or communities to operationalize those funds</p> <p>Establish an emergency reserve fund that can be accessed in times of disaster</p> <p>Explore alternative funding mechanisms for capital improvements to address long term infrastructure needs</p> <p>Explore funding opportunities, such as local option taxes, to better realize the economic impact of visitor spending</p> <p>Revisit resort tax parameters and advocate for updates</p> <p>In partnership with the State, seek opportunities to broaden the use of state funds beyond out-of-state marketing</p>	<p>Deepen representation of broader, more diverse visitor identities to encourage welcoming environment</p> <p>Build capabilities/ mentor to encourage diverse small business ownership</p> <p>Invest in leadership education and training to ensure diverse access to industry leadership positions</p> <p>Increase the diversity of the Yellowstone Country's and DMO organizations' boards to ensure representation of all stakeholders, including but not limited to Indigenous communities, local residents, and youth</p>	<p>Develop a shared list of identified stakeholders who should receive and provide information</p> <p>Expand region's capacity for environmental risk evaluation and data collection</p> <p>Increase informed decision-making and sustainable development</p> <p>Develop and implement a long-range Destination Development Plan to articulate the region's long-term vision and prioritize key investments, allocate focus, and achieve balance in visitor capacities across the region</p>

COMMUNITY PARTNERS

Regional DMOs, Downtown business organizations, and Chambers, TAC, Dept of Commerce, City/County governments, State lawmakers, Economic Development Agencies (i.e. Northern Rocky Mountain Development), community foundations, National Parks Service, MT Department of Transportation, Local and regional nonprofits, Custer Gallatin National Forest, BLM, business owners

IMPERATIVE 2

Ensure the necessary capacity and capabilities to deliver the right messages to the right audiences at the right times.

OBJECTIVES

- Increased positive resident sentiment as a result of initiatives
- Increase in brand awareness
- Increase diversity of visitors

STRATEGIES	Expand and connect crisis readiness and response	Increase awareness of and support for tourism benefits and impacts	Bolster strength and relevance of regional brand	Prioritize responsible destination promotion practices
INITIATIVES	Establish local crisis communication processes and tools to better inform residents and visitors - help ensure that every community has a plan	Leverage insights to better understand the impacts of tourism on population growth and community livability	Explore and expand inclusive marketing opportunities to ensure the region is welcoming to diverse visitor audiences	Review the funding rules around tourism and marketing and advocate for balanced strategic changes (considering unintended consequences)
	Establish crisis communication network across the region and with the state/counties	Increase the opportunity for communities to share what they've learned through challenges and successes - share best practices	Align with and support diverse DMO/CVB brands within the region when possible	Utilize media and communication channels to promote environmental stewardship and responsible recreation principles to residents and visitors
	Increase access, awareness and utilization of crisis comms plan - make sure everyone knows who to call	Establish and maintain resident and business communications program		Balance promotion of a place, attraction or activity with the locals in mind.
	Be at the table for important conversations that impact the region - coordinate	Deepen knowledge of and education of both positive and negative impacts of tourism		Increase collaboration and alignment in responsible recreational programs (eg. Leave No Trace)
	Maintain relationships among agencies for crisis communications in spite of turnover	Advocacy campaigns that explain the need for tax structures that enable tourism spending to go toward needed services and infrastructure - specifically towards road funding		
	Educate the broader region on what Yellowstone Country Tourism does. Increase those conversations/be at the table during their discussions/ collaborate			
	Highlight and advance champion stories and examples			
	Continue to display a strong, consistent regional brand across the region's CVBs that evolves with changes in visitor demographics and the broader visitor economy			

COMMUNITY PARTNERS

COAD group (example: Park Co COAD), Hospitals, ITRR, Destination MT, Headwaters Economics-research partners, Newspapers and other news services, Schools and childcare organizations



IMPERATIVE 3

Enhance and sustain regional assets to support the current and future needs of residents and visitors alike.

OBJECTIVES

- Reduce vacancies in hospitality positions
- Increase employee retention in tourism businesses

STRATEGIES	Develop and protect regional assets and amenities to improve and diversify available experiences	Enhance and connect wayfinding efforts	Engage in and support solutions for affordable housing challenges	Advocate for improved public and active transportation options	Protect and maintain existing assets and resources	Build programs and partnerships that sustain Yellowstone Country's current and future workforce needs
INITIATIVES	Advocate for and improve trail connectivity to allow biking options between trails, communities and businesses	Work with communities and their governing agencies to determine wayfinding efforts that will direct visitors in the correct way	Engage in research regarding the need and number of housing units needed	Advocate for passenger rail - be at the table to make sure our priorities are reflected In progress	Identify and support initiatives that protect Yellowstone Country's outdoor assets	Identify areas in need of hospitality management training and expand access beyond front line workforce. (ref: Super Hosts)
	Explore and develop programs and opportunities for visitors to contribute positively to our region	Collaborate with Indigenous communities to review and/or create new wayfinding that is culturally aligned and appropriate	Identify state and federal funding resources to address housing challenges such as an economic development grant	Identify and pursue public-private partnerships to increase access and decrease personal vehicle use	Explore opportunities to support stakeholders seeking to enhance the sustainability practices of the tourism industry in the region	Explore solutions for seasonal worker recruitment and support programs
	Explore destination development opportunities that enhance non-outdoor recreation tourism drivers	Correctly identify and share information regarding important local cultural and historical sites	Identify and partner with communities and governing agencies to advocate for increased workforce housing - address market conditions Action step: identify existing programs to replicate and expand	Increase and improve bus service between all businesses, attractions and communities - Dependent on workforce	Increase awareness and participation in tourism grant and available recovery funding to repair, maintain, and expand critical tourism infrastructure	Partner with regional tourism, higher education (MSU, Gallatin College) and hospitality employers to develop strategies to mitigate barriers to attracting new workers to the industry.
	Expand sustainable tourism offering, e.g. agritourism, ecotourism, etc.	Provide route suggestions and wayfinding to minimize congestion in peak visitation seasons and direct visitors away from resident-occupied areas		Support and engage in increasing public/shared/ mass transportation options		Work with businesses to create career pathways and skill development opportunities within the industry to help address workforce gaps. (workforce development dept, ec dev, etc.)
	Build and expand multi-use trails and pathways plan	Find ways to partner with other organizations and land managers to improve wayfinding through increased trail signage and online guides	Highlight and connect business around best practices and success stories from housing initiatives across the region	Develop rails to trails and other bike connectivity options		Establish a tourism ambassador and local host program. (to increase resident participation and knowledge of tourism assets and opportunities)
	Explore options to develop new tourism experiences outside of Gallatin County and Yellowstone Park		Explore options to drive income from tourism spending to support and/or subsidize housing initiatives	Address transportation gaps to increase accessibility to more remote outdoor or rural destinations, particularly those where visitation is low but also desired by locals		
	Invest in the development of new hospitality assets and outdoor recreation infrastructure to better distribute visitation throughout the region					
	Diversify lodging options to provide opportunities for visitors at different price points					

COMMUNITY PARTNERS

Bike clubs (ex. Livingston Bike Club, SWMTBA), Gallatin Valley Land Trust, Aero, Abundant Montana, Upper Yellowstone Watershed Group, Gallatin River Task Force, CWMA-weed group, Conservation Groups, Community councils in unincorporated areas, HRDC, Neighborworks Montana, National Affordable Housing organizations (located in Butte but works across the state), Park County Housing Coalition, Bozeman Area Chamber of Commerce, Big Sky Chamber of Commerce, Indian Economic Affairs Office, Western Native Voice, Mountain Time Arts, Hoppa Mountain,

AINTA-National organization, STED, MIDA, Windrider, Streamline, Western Transportation organization, Big Sky Passenger Rail Authority - working to bring passenger rail to southern Montana, BLM, U.S. Forest Service, National Park Services, Western Sustainability exchange (WSE), Leave No Trace, Park County Environment Council, Paradise Valley recreate responsibly, Be Good to Bozeman, RiverKind, Montana State Parks, Food resource centers (ex. Livingston food resource center), Gallatin College, Job Service, high schools

IMPERATIVE 4

Prioritize collaboration with and inclusion of community perspectives in destination advancement.

OBJECTIVES

- Increase number and diversity of new stakeholders and organizations
- Year-over-year increase in “Resident Support of Tourism” score over 2022 baseline

STRATEGIES	Facilitate and encourage resident involvement, collaboration, and communication	Catalyze cross-sector and cross-regional collaboration and partnership
INITIATIVES	Regularly measure and address resident sentiment issues	Strengthen collaboration among the region's DMOs and Chambers to more effectively align on industry priorities and shared knowledge, and reinforce channels of communication
	Communicate the financial and economic benefits of tourism with residents as core audience and beneficiaries	Advance engagement in tourism self-determination with local residents, ranchers, elected officials, other community organizations, etc
	Identify representatives from Tribal communities who can provide cultural context and advice	Prioritize effective and efficient engagement with legislators, NGOs, academia, and other influencers to advance and support pro-tourism policy and education and ensure that information sharing continues
	Strengthen communication with and participation of residents regarding the goals for and awareness of the benefits of tourism to the community and economy	For communities that do not have a DMO/CVB/ Chamber, identify a local leader to be the voice in regional initiatives
	Increase engagement with rural communities to promote less- visited communities/ experiences and improve visitor dispersal	Work with elected officials (state, local and federal) on zoning constraints and potential policy solutions
	Leverage Yellowstone Country's strength in creating opportunities for collaboration to build better partnerships with Montana's historically marginalized communities, including but not limited to the region's Indigenous population	Outreach program between the industry/ community/ suppliers and potential new businesses, collaborate better with existing businesses
	Explore opportunities to ensure residents can access popular outdoor sites and assets through permitting or other regulation	Create and improve tourism monetization through support of local small businesses and entrepreneurs

COMMUNITY PARTNERS

Wild Livelihoods Coalition, wildlife conservation organization (wolf , bears, ect.), Tom Murphy and wildlife photographers, local influencers, travel writers and photographers

IMPERATIVE 5

Expand understanding, experience, and management of current and future visitor needs and behaviors.

OBJECTIVES

- Increase length of stay
- Increase shoulder season and off-season visitation
- Increase per visitor spend
- Year-over-year increase in participation in Leave No Trace training

STRATEGIES	Enhance visitor management capabilities and capacity
INITIATIVES	Advance education and management of visitor and resident behaviors, expectations and attitudes
	Define and increase focus on attracting visitors best aligned to the ethos of our region - and the times of visitation, through data and research
	Collaborate with the National Parks Service, BLM, FWP, and State Parks to identify and explore visitor management best practices and approaches
	Build on existing efforts that highlight assets with less visitation to encourage visitor dispersal and ease the impact of visitation on the region's natural environment
	Expand international visitor readiness and region-wide exploration
	Continue to encourage visitor dispersal throughout the region by curating itineraries or marketing experiences that result in more balanced seasonal and geographical visitation

COMMUNITY PARTNERS

State outfitters (MOGA), Montana Dude Ranchers Association, Montana Ski Association, BrandUSA, US Travel



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