

Glacier Country

Regional Tourism Resilience Plan

July 2022 - December 2023

Prepared by Coraggio Group
503.493.1452 | coraggiogroup.com



LETTER FROM REGIONAL DIRECTOR

Hello,

Glacier Country Regional Tourism Commission is happy to have worked on the Tourism Resiliency Plan in coordination with the Montana Department of Commerce and the Coraggio Group. As a destination stewardship organization, Glacier Country Tourism adopted a community-driven 10-year Destination Stewardship Plan in October 2022.

Destination stewardship measures success against the well-being of destinations, considering nature, human health and community identities. It focuses on being thoughtful about how the quality of the visitor experience can be balanced with the quality of life for residents, about the visitor who would provide maximum financial value to our local communities while having the optimal social and environmental impact, and about how we can responsibly manage our industry for the benefit of all in our communities. To succeed, destination stewardship requires full community collaboration, engaging stakeholders from all walks of life. Glacier Country Tourism started developing a community-driven destination stewardship plan in 2021 and completed it in 2022. Our destination stewardship process involved working with people who live and work in our communities and included 16 community town hall meetings in eight counties (200+ attendees), two surveys – one for residents (1600+ responses) and one for stakeholders (225+ responses), 11 focus groups (50+ participants) and 12 one-on-one interviews.

Throughout Glacier Country Tourism's planning process, the region's communities demonstrated an overwhelming willingness to come together and develop a shared vision for Glacier Country's visitor economy. That collaborative spirit is critical as we aim to bring this vision to life. No single individual or organization can implement the Destination Stewardship or Resiliency Plan alone. It will require the support of a broad-reaching group of contributors and a collaborative mindset.

The Montana Resilience Plan is built upon Glacier Country's stewardship efforts by examining the region's ability to adapt and recover from social, economic and environmental disruptions. This plan is just one of six regional plans across the state and also a statewide resilience plan that complements and enhances our regional plan.

A vibrant visitor economy brings with it a commitment to our communities and residents. When approached with intention and strategy, tourism can offer significant benefits to our region.

In this plan, you will learn about the goals and origins of this process, who was involved, and the goals set at the beginning of the resilience plan process. There are detailed imperatives from Glacier Country Tourism's Destination Stewardship Plan and the Montana Resiliency Plan with timelines for implementation. In addition, the report defines the resiliency framework used in our regional evaluation. The assessment was vital to understanding our tourism industry through a comprehensive and intersectional lens.

We want to take this opportunity to thank everyone who participated in this shared process. From listening sessions to interviews to surveys, the input has been invaluable and informative in creating these imperatives. Your participation and ongoing commitment to your community do not go unnoticed. Thank you for shaping the future of Glacier Country.

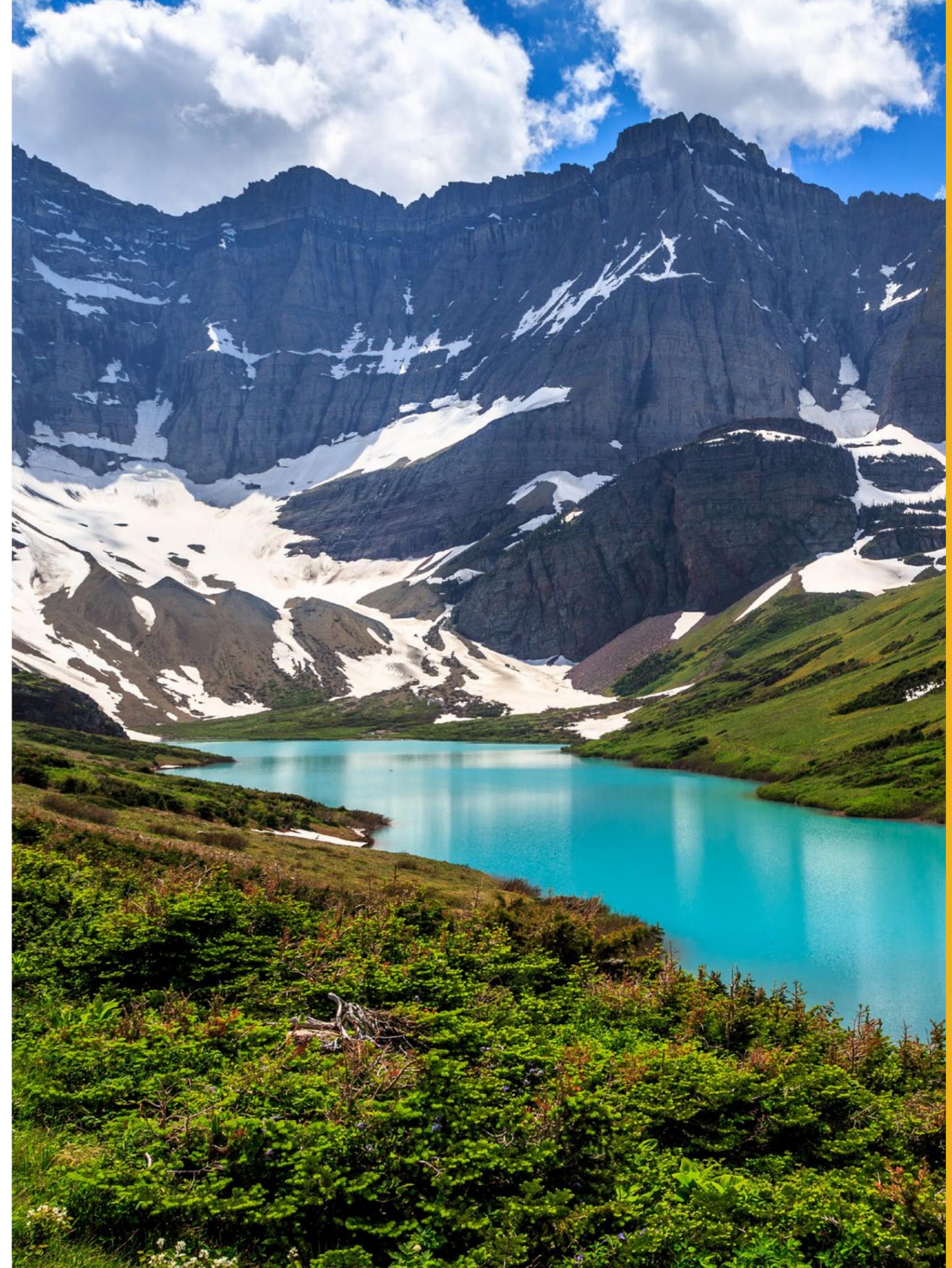
We also thank Coraggio Group, including Future Partners, Clarity of Place and Dr. Kelly Bricker, for facilitating this process.

This Resiliency Plan would not have been possible without 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.

We are committed to seeing this plan through and embracing the change, effort and collaboration it deserves.

Thank you, and we look forward to working with our communities and partners.

Racene Friede
President CEO
Glacier Country Regional Tourism Commission



Acknowledgements



Plan Contributors:

- Aerionna Skrutvold
- Annie Mead
- Aubrie Loroña
- Barbara Liss
- Barb Neilan
- Brandy Burke
- Christina “Riley” Polumbus
- David Diehl
- Dax Schieffer
- Debbie Picard
- Diane Medler
- Dirk De Coninck
- Edna White
- Holly Kuehlwein
- Jenna Boltz
- Jessie Yeager
- Jim McGowan
- Juli Thurston
- Julie Mullin
- Kristi McNeal
- Kyle McGowan
- Lailani Upham
- Linda Howard
- Loren Flynn
- Lucy Beighle
- Matt Lautzenheiser
- Megan Bland
- Mike Johnson
- Racene Friede
- Ramona Holt
- Ray Brown
- Seth Wilson
- Shannon Brilz
- Steve Clairmont
- Tia Metzger
- Troy Douthit
- Victoria Lee
- Glacier Country Tourism
- Windfall, Inc.
- Swan Mountain Outfitters
- Explore the Arts
- Destination Missoula
- Glacier National Park
- Logan Health
- Big Sky Solutions Strategies
- Glacier Country Tourism
- Discover Kalispell
- East Shore Smoke House
- Averill Hospitality
- Windfall, Inc.
- Glacier Country Tourism
- Windfall, Inc.
- Windfall, Inc.
- Sanders County MSU Extension Service
- Explore Whitefish
- Glacier Country Tourism
- Windfall, Inc.
- Iron Shield Creative/Visit Blackfeet (Blackfeet Tribe Tourism)
- Wolf Trail Montana LLC
- Montana Fish, Wildlife and Parks
- Glacier Country Tourism
- Historical Museum at Fort Missoula
- Windfall, Inc.
- Management Consultants, Inc.
- Glacier Country Tourism
- Holt Heritage Museum
- Sanders County Community Development
- Blackfoot Challenge
- University of Montana
- Eagel Services
- Windfall, Inc.
- Kootenai Country Montana
- Glacier Distilling Company

Consultant Team:

- Coraggio Group
- Specialized Contributions by Future Partners and Clarity of Place
- Global Sustainable Tourism Council Assessment - Kelly Bricker

Executive Summary

The residents of Glacier Country, the area made up of 8 counties, 75+ communities and 22,000 square miles in Western Montana, are proud of their region but acknowledge many of the challenges of being home to a world-class tourism destination. Eighty-two percent of Glacier Country residents are happy that they live in Montana, and over three quarters feel a personal responsibility to represent Montana well. Ninety-two percent of Glacier Country residents believe they have easy access to the outdoors and green spaces, and two thirds believe that Montana is at risk for climate-related issues. Glacier Country residents believe that Montana is safe and has a variety of kid-friendly activities. However, residents of the region worry about available jobs and the rising cost of housing. The cost of living and housing stock also present significant challenges; only 25% believe that the cost of living is affordable, and only 19% believe there is a variety of housing stock available for all income levels. 43% believe Montana is culturally diverse. Overall, Glacier Country residents are optimistic about the future of the region and committed to preserving its natural beauty and community charm.

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

TIMELINE

GLACIER COUNTRY TIMELINE

- Session 1: **July 25, 2023**
- Session 2: **August 9, 2023**
- Session 3: **August 29, 2023**

**The Glacier Country Resiliency Plan was built upon the Glacier Country Tourism Stewardship Plan.*

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

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

Summary of Stakeholder Engagement Activities and Numbers

- Focus Groups **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**

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 and 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 and 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

Ensure broad engagement in destination management efforts

OBJECTIVES

- Establish a baseline resident sentiment score around tourism and improve upon it
- Increase the number of collaborative projects between stakeholders
- Increase the number and diversity of new stakeholders and organizations

STRATEGIES	Advance and diversify civic engagement	Increase collaboration with public organizations, private organizations, and NGOs
INITIATIVES	<p>Streamline current tourism governance structures to clarify roles and responsibilities and increase regional tourism board effectiveness</p> <p>Increase efforts to engage tourism stakeholders and residents who are based outside Flathead County or Missoula County</p> <p>Increase participation and representation of region's diversity of cultures and perspectives</p> <p>Encourage greater regional alignment and leverage of existing marketing capabilities and brand</p> <p>Build a plan to support and market individual Indigenous-owned businesses, in addition to showcasing events on the Blackfeet and Flathead reservations</p> <p>Encourage broader engagement within regional tourism leadership</p> <p>Partner with local, regional, Tribal economic development agencies to develop programs and services that benefit the tourism industry</p> <p>Assist community stakeholders in grant writing through training, workshops and potentially retaining the services of a person with grant-writing expertise *</p> <p>Work with partners to develop "how-to guides," outlining practical ways for partners to integrate destination stewardship principles into their own organizations *</p> <p>Develop a more expansive resident sentiment survey program that tracks sentiment on the visitor economy and community issues, and publish the results on a regular basis for ongoing conversation *</p> <p>Enhance and develop avenues for citizens to engage with Glacier Country Tourism so they are informed, feel heard, and become involved and collaborate to find solutions *</p> <p>Establish regularly scheduled community forums and other live and digital programming to provide more transparent and effective communication between industry stakeholders and residents *</p> <p>Build industry engagement with organizations and networks responsible for planning and policy decision-making that impacts the visitor economy *</p> <p>Convene experts in areas such as housing, transportation, workforce, etc. with stakeholders in the tourism industry to share strategies, best practices, and the perspectives of the visitor economy *</p> <p>Partner with local stakeholders to develop destination development plans that pull together planning, policy, and capacity-building efforts *</p> <p>Facilitate greater connection and synergy between independent destination management and development initiatives across the region</p> <p>Connect, engage, and uplift initiatives within other relevant development plans to ensure collaboration of resources and priorities across organizations and assets, particularly in areas that fall outside of tourism's direct control or management</p>	<p>Increase inter-regional partnership and collaboration opportunities with neighboring regions to increase the impact and effectiveness of Glacier Country's own efforts. (e.g. pursue wider geographic distribution to relieve over-visitation)</p> <p>Deepen relationships and collaboration with adjacent sector government agencies and community organizations to pursue solutions to issues affecting residents and visitors alike</p> <p>Continue to advocate for regional cooperation to create a seamless visitor experience and share a "rising tide lifts all boats" mentality across the region *</p> <p>Work with partners to develop experiences offering visitors the chance to "give back", with possibilities including creating "voluntourism" opportunities or incentivizing responsible visitor behavior with discounted or exclusive experiences *</p> <p>Advocate at state and federal levels to address community issues related to the visitor economy, such as supporting ways to alleviate visitor pressures on gateway cities *</p>

* Glacier Country Tourism Stewardship Plan Initiative.

IMPERATIVE 2

Protect natural resources while strengthening tourism infrastructure

OBJECTIVES

- Decrease year-over-year trailhead-related complaints
- Measure and increase the number of communities who pledge to destination stewardship principles
- Increase Glacier Country's visitor Net Promoter Score (NPS)

STRATEGIES	Protect outdoor assets and resources and promote responsible recreation	Enhance the destination experience	Ensure the destination is welcoming to all
INITIATIVES	Develop itineraries focused on sustainable visitor experiences and trails, integrating responsible behaviors with local businesses and organizations that embrace sustainable tourism	Support the pursuit of alternative funding sources to improve necessary infrastructure throughout the region	Increase efforts to create an inclusive and welcoming destination, including visitor groups historically underrepresented in the region's visitor demographics
	Actively recruit and gain ongoing commitment for stakeholder engagement in plan implementation through participation in initiative management teams	Support efforts to increase wayfinding infrastructure to improve access to lesser-known attractions, and inter-regional experiences as a means to disperse visitors throughout and outside of Glacier Country	Assist partners in addressing systemic barriers and increase equity of visitor access and experiences, e.g. investment in technological solutions, resources, and tools to support equitable navigation of permitting system for Glacier National Park, affordability of attractions, etc.
	Develop resident communication strategies to reduce anti-tourism behaviors: "Be Kind" messaging	Investigate pathways to introduce new and improve existing amenities and visitor services along transportation corridors to draw and support visitation throughout the region.	Establish a DEI plan for Glacier Country Tourism
	Collaborate with parks, campgrounds, etc. to leverage existing capacity and availability	Grow the domestic tourism market by creating and promoting more "off-the-beaten-path" destinations and experiences for Montana visitors *	Prepare the region for accessible international visitation by investing in multilingual signage, expanding multilingual promotional material and wayfinding outside of the National Parks, and training frontline workers to assist non-native English speakers
	Explore opportunities to ensure local/resident access to campgrounds, other assets	Identify and prioritize "high yield, low impact" travelers who are more likely to leave a larger economic impact, come during shoulder season and travel beyond iconic destinations *	Advocate for improved accessibility of key tourism assets for individuals with a variety of mobility challenges and other disabilities
	Continue to pursue development and enhancement of outdoor recreation activities, assets, and infrastructure that bolster the region's existing reputation as a world-class outdoor recreation destination	Identify and incentivize event and festival opportunities to drive shoulder season visitation *	
	Explore data and technology solutions to enable proactive hyperlocal destination management visitation patterns and trends	Explore for funding mechanisms, such as the resort tax, that harness tourism to drive public revenues for infrastructure and capacity development *	
	Develop content strategies to deliver Recreate Responsibly messaging in the various channels where visitors are consuming content *	Advocate for infrastructure improvements *	
	Encourage more businesses to take part in the Montana Recreate Responsibly Business Partner program and encourage responsible tourism throughout the customer journey *	Support the diversification of the region's tourism products – beyond outdoor recreation assets and experiences – to expand the region's appeal to a more diverse range of visitor types, with additional focus on areas outside Missoula, Kalispell, and Whitefish	
	Actively highlight organizations that embrace sustainable and regenerative practices throughout their business *		
Support stakeholders in the development of real-time data on availability of outdoor recreation assets			

* Glacier Country Tourism Stewardship Plan Initiative.

IMPERATIVE 3

Increase the availability and quality of tourism workforce

OBJECTIVES

- Increase employee retention in tourism businesses
- Help to increase annual count of housing units meeting the affordable housing standard of 30% of the US median income

STRATEGIES	Expand outreach and training	Develop and connect resources supporting workforce support infrastructure and small businesses
	Increase promotion of industry careers and open positions to the local community	Develop and advance tourism-specific regional workforce development programs, including customer service training and brand ambassador training for visitor-facing workers, building upon initiatives from the Destination Stewardship Plan
	Partner with higher education and technical school system to leverage and advance local hospitality and tourism industry training programs	Advocate to improve the supply of affordable housing and support specific projects likely to host tourism workers
	Advocate for support and resources for small businesses and entrepreneurship across the region	Support and engage in conversations around local childcare initiatives
	Leverage data to promote information about the economic impact of tourism, and make data available to all communities in Glacier Country (e.g. fund resources like DI economic calculator)	Facilitate webinars and/or educational resources for regional stakeholders about innovative workforce development and childcare options
	Explore opportunities to champion and promote positive stories from the tourism industry workforce to promote the regional tourism industry as a great place to work	Develop resources for businesses owned by tribal members, people of color, LGBTQ+, women and other underrepresented groups to remove systemic barriers and provide access and opportunity to benefit from the region's visitor economy*
	Partner with other regions and industries/sectors across Montana to identify and leverage potential solutions to workforce shortages that could mutually benefit different geographies and industries	Engage in public-private partnerships to enhance workforce development initiatives revolving around housing, transportation, and childcare*
	Support greater access and resources for participation in industry educational conferences and memberships, e.g. IPW, DI, ESTO, etc.	Develop community-wide programs to increase awareness and support of tourism and hospitality as a key economic driver that provides growth opportunities for all locals and small businesses*
	Develop a Glacier Country Ambassador program to provide visitor-facing workers and residents with the knowledge, tools, and resources they need to be ambassadors for responsible tourism in the region*	Support the development and implementation of a referral program where businesses are incentivized to refer customers to other local businesses*
	Enhance and promote awareness of hospitality culture training programs in collaboration with local educational institutions and industry partners*	
	Develop and promote training programs for stakeholders to strengthen alignment and positioning of the region*	

* Glacier Country Tourism Stewardship Plan Initiative.

IMPERATIVE 4

Align resources in support of strategy and implementation.

OBJECTIVES

- Work to foster diverse representation and inclusive representation at the board level
- Increase stakeholder awareness of destination stewardship
- Increase the number of stakeholders who have access to needed data

STRATEGIES	Ensure proactive, inclusive, and consistent stakeholder communication	Enhance data collection and knowledge-sharing capacity
	<p>Increase industry-focused advocacy channels and opportunities</p> <p>Strengthen coordination with state to ensure timely information and crisis communication is received and can be communicated out through Glacier Country's channels</p> <p>Encourage inclusion of more individuals from a variety of demographic backgrounds in the region's marketing materials</p> <p>Ensure all messaging and materials from Glacier Country Tourism are welcoming and representative of the ethos of Glacier Country</p> <p>Develop content strategies to deliver Recreate Responsibility messaging in the various channels where visitors consume content *</p> <p>Build awareness of existing crisis response plans and ensure that Glacier Country Tourism can effectively communicate with visitors in the event of a crisis</p> <p>Ensure regular public communication of progress toward Resilience Plan and Stewardship Plan outcomes to establish Glacier Country as a stewardship leader within Montana's tourism industry</p> <p>Continuously monitor and assess the evolving impacts of high resident population growth in evaluating strategies to mitigate the impacts of high visitor volumes</p> <p>Ensure ongoing communication of existing strategies and progress toward minimizing and mitigating some of the negative impacts of tourism at local, regional, and state levels</p> <p>Hire community engagement director(s) to engage with residents and local community organizations and advocate for the interests of all parties *</p> <p>Convene experts in areas such as outdoor recreation, trail development, agritourism, arts and culture, culinary, etc. With local stakeholders to assist in the development and implementation of destination development plans *</p>	<p>Support the rollout of the statewide Electric Vehicle Infrastructure Deployment Plan and advocate for locating charging stations in opportune areas and communicate opportunities for EV charging stations</p> <p>Identify gaps in the location of current EV charging stations</p> <p>Share funding resources to improve broadband and Wi-Fi throughout the region</p> <p>Provide information on funding opportunities and for small business enhancement to help attract additional visitors</p> <p>Continue to seek and diversify new types of resources/funding for both tourism marketing and tourism management as they become available to both the public and private sector</p> <p>Provide information on distances between regional destinations within the travel guides and in visitor-facing resources</p> <p>Share information regarding lodging and housing policies that support a well-balanced experience for residents, communities, and visitors alike</p> <p>Work with key partners to perform research to better understand and predict workforce needs within the region in response to changing patterns of demand for tourism workers</p> <p>Explore technology enablement for greater visitor access to information</p> <p>Gather and share data and information related to the visitor economy that may be utilized in addressing community issues, such as short-term rental and visitor flow data *</p> <p>Continue to invest in data management platforms to monitor visitor flows and carrying capacities *</p> <p>Gather and share data and information related to the visitor economy that may be used in advocating for better transportation links throughout the region *</p> <p>Gather and share data and information related to the visitor economy that may be utilized in attracting investment in lodging and accommodations *</p> <p>Continue to invest in data management platforms and share information with partners and stakeholders to inform local strategies *</p> <p>Support opportunities to expand upon limited public transportation options in the region</p> <p>Support additional and alternative funding sources available for natural resource protection and restoration</p>

* Glacier Country Tourism Stewardship Plan Initiative.



coraggiogroup