Montana's Missouri River Country

Regional Tourism Resilience Plan

July 2022 - December 2023

Prepared by Coraggio Group
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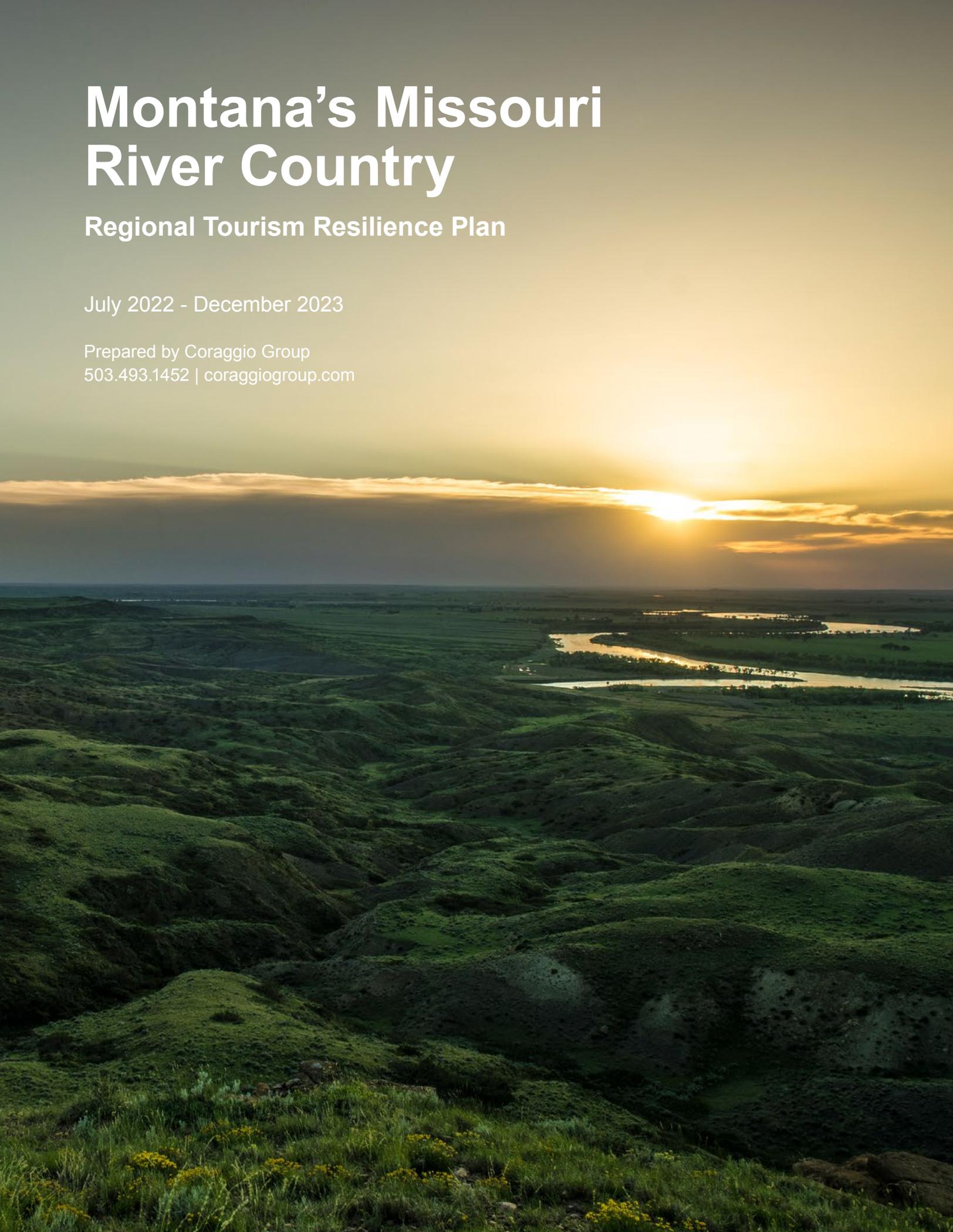
LETTER FROM REGIONAL DIRECTOR

Dear Partners,

We are pleased to present to you our Tourism Resiliency Plan, developed in collaboration with the Montana Department of Commerce and the Coraggio Group. As a region that is experiencing growth in tourism, Montana's Missouri River Country recognizes the importance of destination stewardship and resilience as core values.

This plan has enabled us to assess our strengths, weaknesses, and opportunities for enhancing both visitor experiences and the well-being of our residents. It is one of six regional plans within our state, complemented by a statewide plan that enriches our efforts.

With the success of tourism comes a responsibility to our communities and residents, a responsibility that has become even more evident in the wake of the COVID-19 pandemic. This plan emphasizes proactive and responsible tourism practices, celebrating positive impacts while addressing challenges.

Through extensive stakeholder outreach, research, and reflection, we have crafted a practical, forward-thinking, and self-aware plan. It is designed to bolster tourism, partnerships, and community resilience, ensuring sustainable growth for Missouri River Country.

Within the plan, you will find insights into its origins, the stakeholders involved, and the goals set forth. Detailed imperatives with timelines for implementation, provide a roadmap for accountability and progress tracking. Additionally, the resiliency framework utilized in our assessment offers a comprehensive understanding of our tourism industry from various perspectives.

We extend our gratitude to all who contributed to this planning process, whether through listening sessions, interviews, or surveys. Your input has been invaluable in shaping these imperatives, and your ongoing commitment to our community is deeply appreciated.

We also acknowledge the vital support of the Montana Department of Commerce, whose ARP A funding made this project possible. Missouri River Country stands to benefit significantly from this plan, which will guide us toward a resilient and prosperous future.

We are excited about the journey ahead as we work together to implement this plan and build a brighter future for Montana's Missouri River Country. Thank you for your support and partnership.

Carla Hunsley

Executive Director, Missouri River Country

Acknowledgements
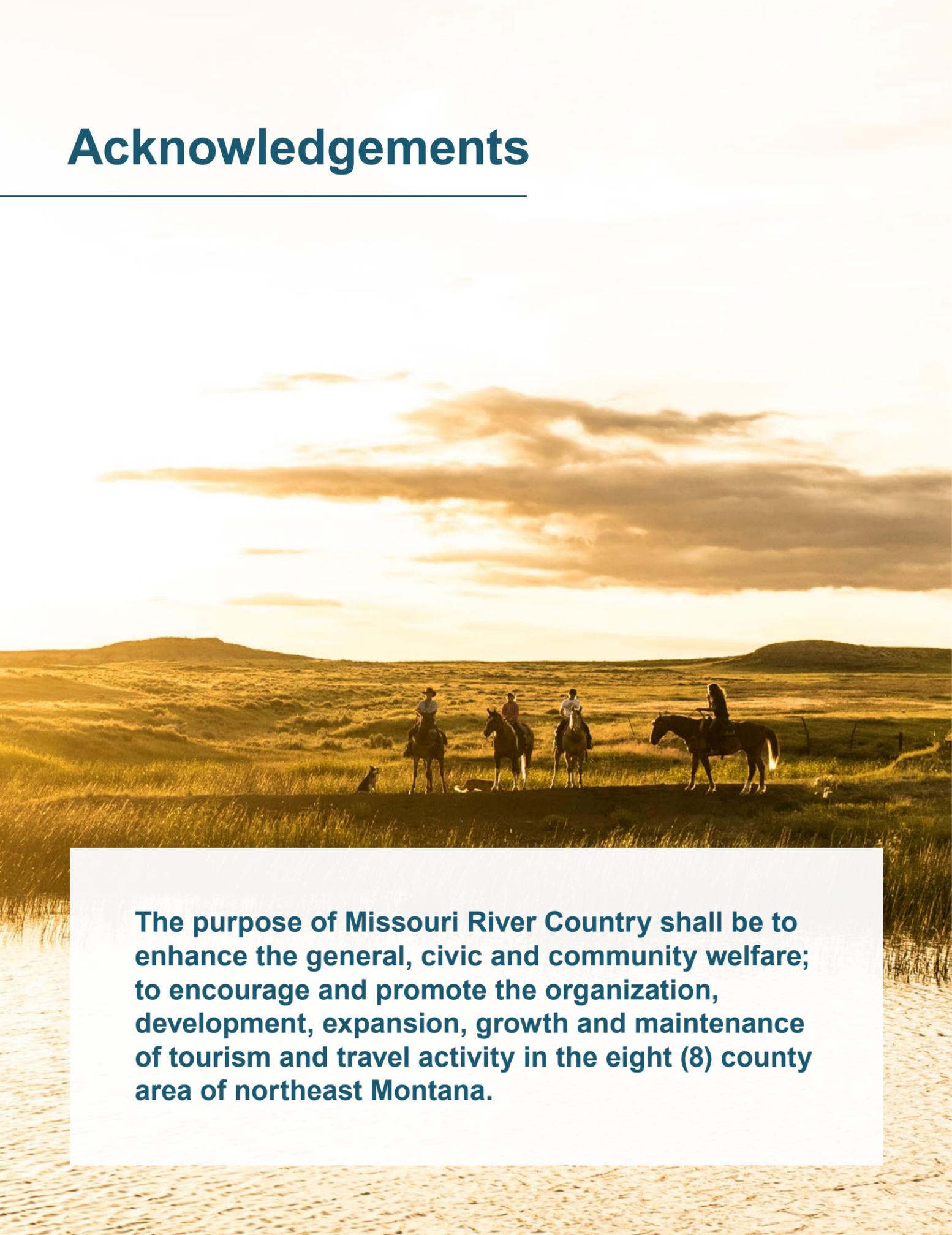
The purpose of Missouri River Country shall be to enhance the general, civic and community welfare; to encourage and promote the organization, development, expansion, growth and maintenance of tourism and travel activity in the eight (8) county area of northeast Montana.

Missouri River Country is an emerging destination with considerable charm and natural beauty. Visitors and residents in the region tend to be conservation-minded, want to benefit the local economy, and are more likely than visitors to other regions to focus on minimizing their carbon footprint and choosing experiences that focus on sustainability, including and prioritize hiring a local guide and supporting locally-owned businesses. The vast open spaces of the region are both a draw for visitation and a challenge for navigating key destination assets. As Missouri River Country continues to grow, the economic impact of visitation is a key strategy for increasing community prosperity.

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 Missouri River Country's beautiful destination for future generations.

TIMELINE

MISSOURI RIVER TIMELINE

Planning Session 1: **June 15**

Planning Session 2: **June 29**

Planning Session 3: **July 17**

Planning Session 4: **July 27**

Planning Session 5: **August 3**

Planning Session 6: **August 31**

Executive Summary

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

The purpose of this plan development was to gather insights on the current state of the Missouri River 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 Missouri River 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 Missouri River 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 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 Missouri River 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 Destination MT, followed by conducting external research and review of documents and data provided by Destination MT, Missouri River 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**
- Interviews with Missouri River 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**

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

Increase the number of MRC board member number of counties with 2 active MRC board members.

OBJECTIVES
- Increase the number of counties with 2 active MRC board members
- Complete/ initiate a collaboration with FWP on sportsmen/visitor etiquette
- Increase funding for cross-regional projects

STRATEGIES	Improve leadership and board collaboration	Increase collaboration with other tourism regions, state agencies, and federal agencies
INITIATIVES	Assess the current organizational structure and staff skills of the MRC tourism organization and board in the context of current and future needs. (1a, 1b, 1c)	Seek opportunities to improve communication between MRC and BrandMT to align on industry support, advocacy and messaging. (1g, 1h)
	Move to a more "working" board with engaged and present members.	Build stronger and shared connections with Chambers, TBIDs, local governments, elected officials, Tribal Tourism Department, other Tribal departments and the Community Services department within the college, hospitality businesses, and determine a structure for working together
	Encourage communities to participate in Main Street programs and get each community on a level playing field.	Seek opportunities to collaborate with other tourism regions in Montana to address broad-ranging issues such as industry workforce gaps. (1i)
	Establish a destination vision and identify a set of governing values and principles to guide decision-making related to tourism development and resilience. (1c)	

IMPERATIVE 2

Address workforce shortages by advocating for additional training, as well as policies that address housing and childcare needs.

OBJECTIVES

- Increase annual count of housing units meeting affordable housing standard of 30% of U.S. median income *partner for data needed (GNDC)*
- Reduce vacancies in hospitality positions (State JobService program-community management team)
- Increase hours or days of key tourism businesses
- Increase the number of days Fort Peck Interpretive Center is open
- Attend x number of job fairs

STRATEGIES	Expand data gathering around the tourism workforce	Increase the supply of workforce housing available to tourism workers	Expand training for tourism workers	Expand outreach to potential tourism workers	Increasingly engage with the general resident population around tourism and its impacts
INITIATIVES	Evaluate existing/emerging workforce development programs to see if they fit the region's needs	Evaluate the potential to increase the availability of short-term rentals to provide alternative lodging options for visitors, while also weighing the potential negative impacts of vacation rentals on housing availability and affordability. (4m)	Provide incentives for training participation	Engage high-schoolers in the industry/ community	Partner with local communities and residents to ensure that tourism growth does not negatively impact community culture. (3e, 3f, 3g)
		Work with local and state entities to ensure continued availability and growing supply of housing at all income levels (feasibility of apartments?), especially for tourism workers. (5h)	In partnership with workforce and education stakeholders, launch tourism industry training courses and organize familiarization tours for hospitality workers to enhance their knowledge of the destination and improve the visitor experience. (2e, 2f)	Work closely with front-line hospitality staff and local guides to align on current visitor preferences, understand destination conditions, and discuss how to balance the visitor experience with local resident needs. (2f)	Engage residents and tour guides in creating itineraries or a marketing plan that promotes attractions and destinations to visitors but also preserves certain areas for local use. (3f)
				Promote part-time opportunities to younger workers	Host community forums to build relationships with community members and have authentic conversations about tourism's impact on residents, including how to preserve local culture and address negative impacts of visitors. (3e, 3f, 3i)
				Promote gig economy opportunities that can benefit visitors' experience (ie. Rideshare and food delivery services)	Implement systems to monitor visitor feedback on their experiences in the region to identify opportunities for improvement. (4o)
				Leverage existing tourism and hospitality workers to help promote the industry and its career paths to future workers or current students to help boost the talent pipeline. (2c, 2d)	
				Work with regional workforce development stakeholders to identify strategies and best practices to improve the conditions for tourism industry workers and to market the sector as a desirable industry for employment. (2a, 2b, 2c, 2d)	

IMPERATIVE 3

Leverage funding to expand visitor attractions in the region and the infrastructure required to access them.

OBJECTIVES
- Build signage of key assets in 3+ new communities
- Build 2 new EV charging stations in MRC
- Increase stakeholder awareness of destination stewardship
- Create & market 2 new agritourism experiences
- Increase average visitation to agritourism assets

STRATEGIES	Improve wayfinding infrastructure	Improve transportation infrastructure and provide additional transportation options for visitors	Improve visitor amenities and facilities	Disperse outdoor recreationists	Develop assets that broaden the region's appeal	Further develop agritourism
INITIATIVES	Implement a region-wide wayfinding system centered around the destination's most important assets. (5f)	Investigate options to boost rental car availability within the region. (5c)	Invest in infrastructure improvements for large events	Explore opportunities to increase the number of full-service campgrounds. (4h)	Invest in the development of attractions and experiences in a balanced way across all counties in the region. (4a)	Pursue agritourism opportunities (leveraging state efforts/funding to grow industry) as a regional competitive strength
	Enhance wayfinding and information on how to access and navigate permitted outdoor spaces and remain off private land. (4g)	Pursue funding sources to improve highways 2, 200, and 191 and other highly traveled roads–and others such as highway 24 and 13–to improve regional mobility and access to key visitor sites. (5a, 5b, 5e)	Increase existing amenity capacity	Increase trail development (hiking, biking, etc.)	Pursue funding sources to develop and enhance cultural and heritage experiences, including accurate information and depictions. (4k, 4l)	
		Support the rollout of the statewide Electric Vehicle Infrastructure Deployment Plan and advocate for stations at key sites. Charging station at Fort Peck Interpretive Center? At hotels? (5d)	Pursue funding sources to implement and improve public facilities such as restrooms, garbage cans and drinking fountains near key visitor assets and population centers. (5g)	Increase the number of designated camping sites and dump stations	Create new recreational activities like mini-golf, go-karts, and playgrounds	
		Investigate whether public transportation services are viable within the region's population centers. (5a)		Develop additional off-road (designated tails for access) and snowmobile access	Create additional equipment rental opportunities	
				Develop outdoor recreation assets and infrastructure to broaden the region's appeal to a broader set of visitors and reduce crowding at a handful of popular sites or attractions. (4b, 4c, 4d, 4e, 4f, 4g, 4h)	Develop winter sport opportunities (for example sledding/ski)	

IMPERATIVE 4

Support local businesses and address their marketing needs by leveraging MRC's brand.

OBJECTIVES
- Increase resident engagement with MRC hashtags and other digital markets
- Increase small business engagement with MRC hashtags and other digital markets
- Increase per visitor spend
- (existing) Increase bed tax revenue

STRATEGIES	Develop and accurately market Missouri River Country's businesses	Establish novel funding mechanisms for small business support
INITIATIVES	Manage visitor expectations for the region's amenities & businesses	Establish or pursue a funding pool for business owners to use for beautification projects.
	Create and communicate a schedule of when businesses are open to manage visitor expectations. (4n)	
	Advocate for local policies and programs that support the development of tourism-dependent small businesses. (3h)	
	Leverage the positive resident sentiment toward the tourism industry and its positive impact on the regional economy to intentionally engage the community in the promotion and management of the destination. (3a, 3b, 3c, 3d)	
	Develop region-specific materials showcasing tourism's economic benefits aimed at residents or distribute existing materials from the state more widely. (3g)	
	Further market existing guided outdoor experiences and investigate if there is demand for developing new types of experiences around niche, off-season, or year-round activities to disperse visitors geographically and seasonally. (4i, 4j)	

IMPERATIVE 5

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

OBJECTIVES
- (existing) project to increase Canadian border opening
- Completed list of contacts for Indigenous communities in the region
- Add at least 1 active tribal representative to MRC's board
- (existing) increase education to local resident organizations on tourism's value (goal of 2 per year currently, goal could be 5)

STRATEGIES	Improve international readiness	Improve tribal representation at all levels of the visitor economy	Increasingly engage with the general resident population around tourism and its impacts
INITIATIVES	Advocate for extended Canadian border openings.	Seek opportunities to diversify the staff and board of the MRC tourism organization, especially with representatives from Tribal nations. (1a, 1e)	Partner with local communities and residents to ensure that tourism growth does not negatively impact community culture. (3e, 3f, 3g)
		Identify ways to engage Tribal nations, as well as the Army Corps of Engineers, elected officials, Fish, Wildlife, and Parks (potentially tribal Fish & Game Department too), and industry and agricultural leaders in planning for tourism growth. (3j, 3k)	Implement systems to monitor visitor feedback on their experiences in the region to identify opportunities for improvement. (4o)
			Host community forums to build relationships with community members and have authentic conversations about tourism's impact on residents, including how to preserve local culture and address negative impacts of visitors. (3e, 3f, 3i)