Introduction

Tourism in Montana is the second largest contributor to Montana's economy, generating 7% of the state's gross domestic product (GDP). According to data from the Institute for Tourism & Recreation Research, Montana's 10.8 million nonresident visitors spent $3.27 billion in 2012. That spending supported an estimated 42,900 jobs and generated a total economic benefit to the state of over $4 billion.

Many of the businesses and organizations involved in tourism have recognized the need to work and plan together to ensure continued success. Since the early 1990s, Montana's tourism partners have participated in a statewide planning process designed to develop a strategic "roadmap", providing focus and direction for their individual and collective actions. In this fifth Montana Tourism and Recreation Strategic Plan, the tourism community seeks to build on its past successes and create an even stronger future for the industry and the state.

Previous strategic plans have built a solid foundation for the success of tourism in Montana. In recent years, Montana's tourism community has developed a strong and credible Montana Brand, identified the most promising visitor segment, targeted the state's tourism marketing to improve effectiveness, developed a stronger understanding of how to compete in the tourism marketplace, and forged effective cooperative efforts.

The Montana Brand: Promising a True Montana Experience

Since 2008 Montana has worked to implement a strong, credible, and differentiating destination brand. The Montana Brand captures the essential attributes that differentiate Montana from its competitors – it is authentic and enduring. The Brand makes a "promise" to visitors about the experience Montana can deliver. The Montana Brand's promise to visitors is:

- *More spectacular, unspoiled nature than anywhere else in the lower 48;*
- *Vibrant and charming small towns that serve as gateways to our natural wonders; and*
- *Breathtaking experiences by day…and relaxing hospitality at night.*

The first brand pillar – spectacular, unspoiled nature – is Montana's ace. With Yellowstone National Park, Glacier National Park, Montana's High Plains, and many other outstanding examples, Montana's natural assets truly differentiate it from its competitors.

The second brand pillar – vibrant and charming small towns – mitigates people's perception of remoteness, assuring visitors that Montana's towns can serve as welcoming gateways to the state's natural wonders. The third brand pillar ties it all together. It leverages Montana's strengths (nature and scenery) to present a balanced visitor experience with the qualities the visitor desires (comfort and exhilaration).

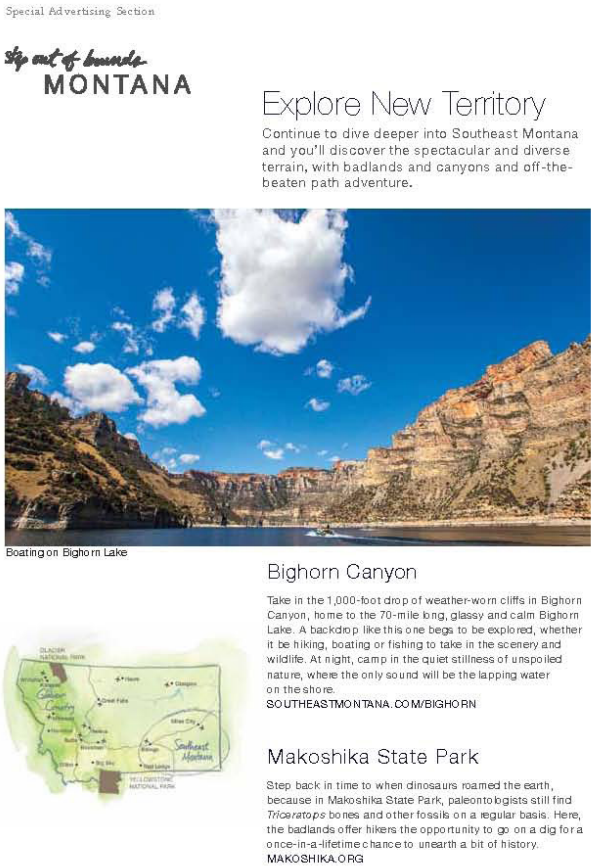
Montana's Visitor: the Geotraveler

Based upon Montana's most differentiating and competitive attributes, the most likely visitor to travel to Montana is the "geotraveler." Geotravelers come from a range of age and income groups, and they have a variety of interests when traveling, including sightseeing, nature tourism, indigenous and other cultural tourism, heritage tourism, agritourism and enjoying local cuisine. What they share is a common desire to immerse themselves in a destination and its culture.

Geotravelers seek authenticity in the people and the place, and want to discover experiences they cannot find anywhere else. Montana appeals to the geotraveler with its rich culture and heritage, intact ecosystems, and unique communities. Geotravelers are socially and environmentally aware, seek to preserve the destination, travel often, and spend a disproportionate amount of their income on travel…making them the type of "high value, low impact" visitor Montana most wishes to attract.

The Targeted Approach

Through brand-consistent marketing and promotion, Montana's destination marketing organizations – Montana Office of Tourism (MTOT), Tourism Regions, and Convention & Visitors' Bureaus (CVBs) – have projected the authenticity of the Montana visitor experience, speaking more clearly to the growing geotraveler segment. In addition, these organizations have also targeted geographic markets more closely based on research and data. This research-driven approach has increased the cost-effectiveness of the MTOT marketing significantly, with stronger conversion rates and a healthy return on investment for marketing expenditures.


Special Advertising Section

Step out of bounds MONTANA

Explore New Territory

Continue to dive deeper into Southeast Montana and you'll discover the spectacular and diverse terrain, with badlands and canyons and off-the-beaten path adventure.

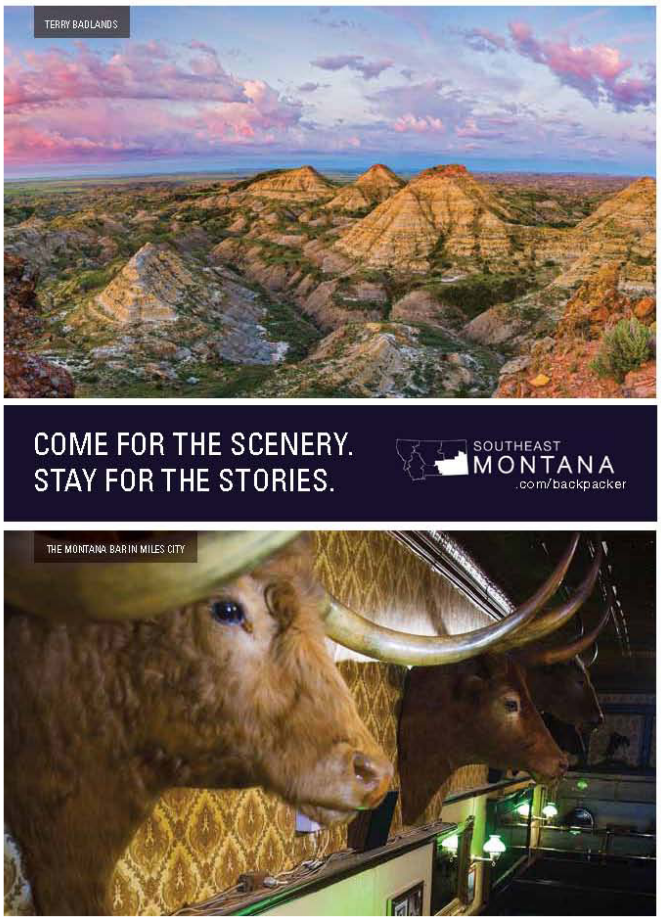
Boating on Bighorn Lake

Bighorn Canyon

Take in the 1,000-foot drop of weather-worn cliffs in Bighorn Canyon, home to the 70-mile long, glassy and calm Bighorn Lake. A backdrop like this one begs to be explored, whether it be hiking, boating or fishing to take in the scenery and wildlife. At night, camp in the quiet stillness of unspoiled nature, where the only sound will be the lapping water on the shore.
SOUTHEASTMONTANA.COM/BIGHORN

Makoshika State Park

Step back in time to when dinosaurs roamed the earth, because in Makoshika State Park, paleontologists still find *Triceratops* bones and other fossils on a regular basis. Here, the badlands offer hikers the opportunity to go on a dig for a once-in-a-lifetime chance to unearth a bit of history.
MAKOSHIKA.ORG



The Information Needs of the 21st Century Traveler

Research has also helped clarify the fast-evolving ways in which travelers seek out and use visitor information. Trip planning can be understood as a three-phase process: inspiration, orientation, and facilitation. This process provides a framework for Montana's tourism stakeholders to structure and coordinate their marketing and visitor information effectively.

Inspiration

The visitor is made aware of Montana and develops a desire to visit. MTOT, Regions and CVBs inspire visitors through marketing and promotion.

Orientation

The visitor begins researching the details of their trip and planning their route – Montana's visitors often have *multiple destinations* within the state. Regions & CVBs provide tools to help the visitor plan a route and encourage a longer stay.

Facilitation

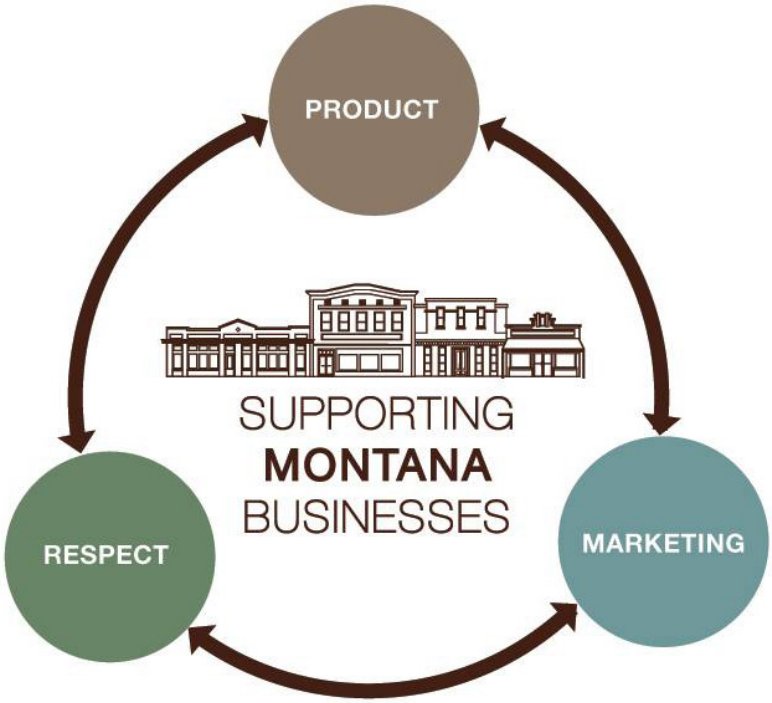
The visitor fills in their itinerary with things to see and do at the destination(s) and along the way. Regions and CVBs, Communities, Tribes, Businesses and Organizations all work together to make visitors aware of the full array of experiences available to them, encouraging them to stop and experience all that Montana has to offer.

The Vision of a Strong Tourism Industry

In 2011, the Tourism Advisory Council (TAC) set out three core areas which could be further strengthened to support a strong and confident tourism industry and ensure the survival and success of Montana's small businesses and communities. These three core areas are Product, Marketing, and Respect. For each, the TAC adopted a goal to guide their efforts in the coming years.

The TAC's goal for strengthening Montana's tourism product is the full utilization of the state's geographical and seasonal assets. The TAC's goal for strengthening Montana's tourism marketing is effectively pooling resources and helping communities work together as part of the overall Montana Brand. The TAC's goals for strengthening respect for tourism in Montana is increasing appreciation of and support for the industry, and preserving and enhancing the lodging facility use tax.

The strengthening of these three core areas provides a vision for the future, in which a strong tourism industry supports the economic health of Montana and its small businesses and communities.



Tourism Advisory Council Members

(Serving during plan development, 2012-2013)

Cyndy Andrus, Chair
Andrus Consulting

Amber Wood-Jensen, Vice Chair
Operations for Management Consultants, Inc.

Philip Aaberg
Sweetgrass Music

Dan Austin
Austin-Lehman Adventures

Ed DesRosier
Sun Tours

Rhonda Fitzgerald
Garden Wall Inn

Beverly Harbaugh
Sand Creek Clydesdales Ranch Vacations

Kim Holzer
Paper Moon Marketing

Bill McGladdery
Town Pump

Stan Ozark
Glasgow Area Chamber of Commerce & Agriculture

Gail Richardson
Naturalist Guide

Jackie Yellowtail
Apsaalooke Nation Tourism

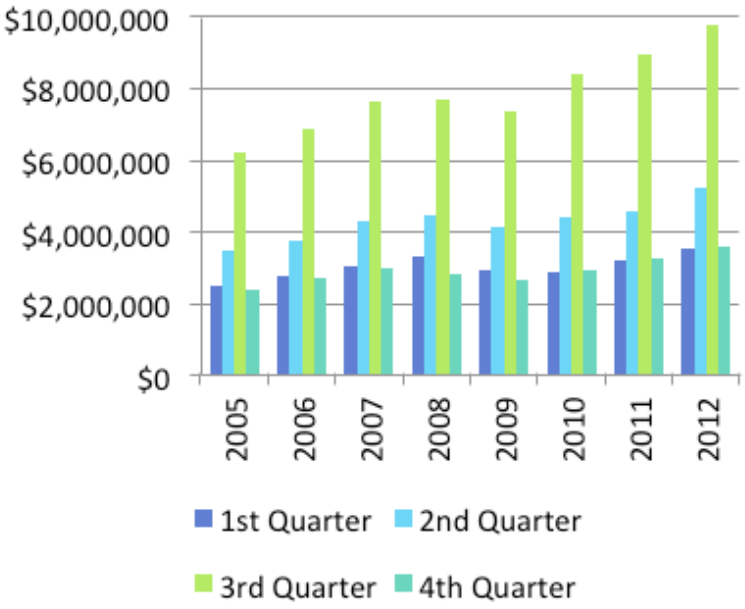
Montana's Tourism Funding

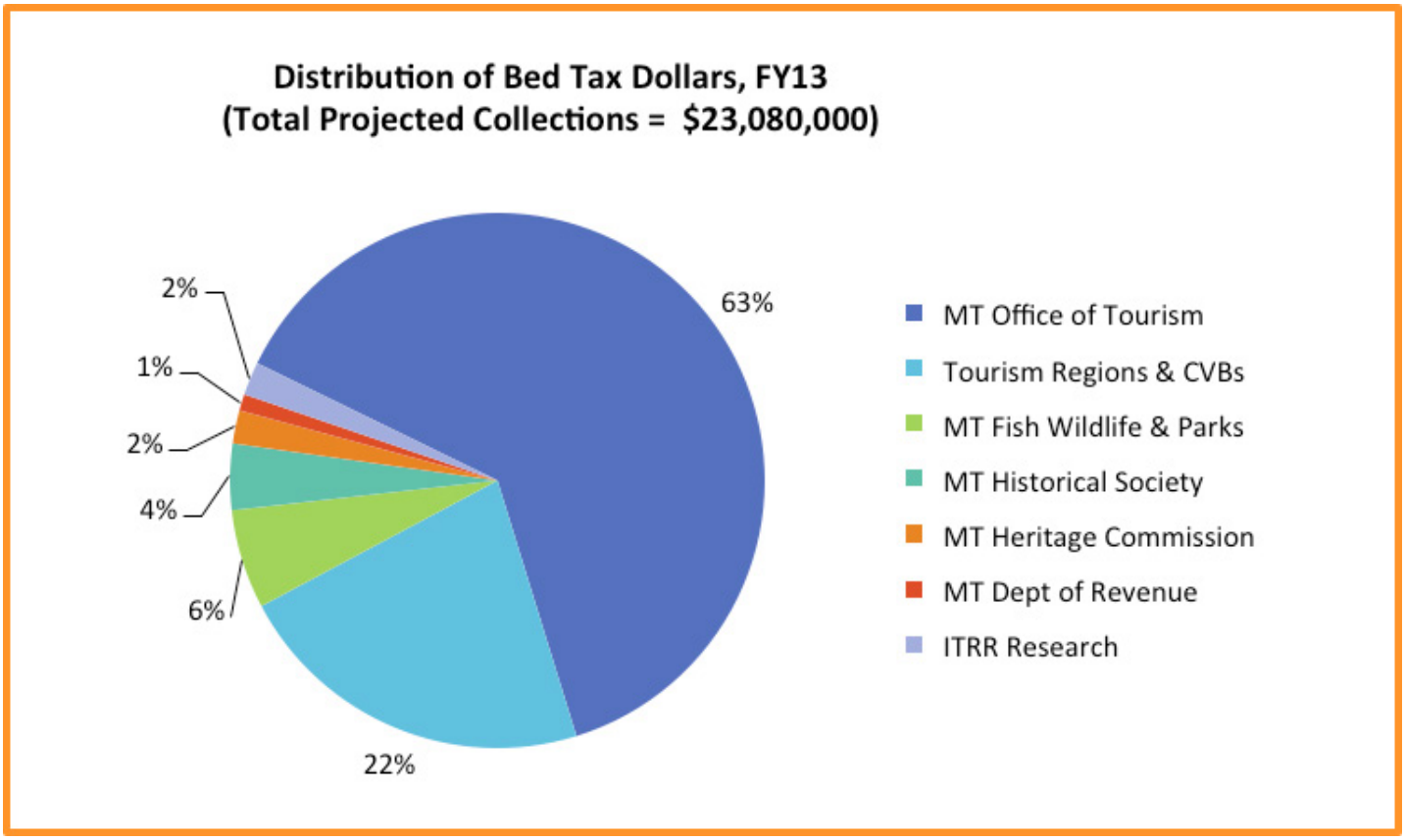
Montana collects a 7% Lodging Facility Tax from guests of hotels, motels, bed and breakfasts, resorts, guest ranches, and campgrounds. The tax has two components:

» The 3% Lodging Facility Sales Tax is deposited in the Montana General Fund. In FY12, it contributed over $15 [illegible]n to the General Fund.

»

» The 4% Lodging Facility Use Tax, commonly known as the "Bed Tax", is used to promote tourism in Montana. In FY12, the bed tax collections exceeded $22 million. In FY13, collections are projected to exceed $23 million. The distribution of these funds is shown in the figure below.





Montana Tourism Stakeholders and Partners

The foundation of Montana's tourism industry rests upon the many **frontline stakeholders** that interact directly with the visitor to "deliver" the Montana experience. These stakeholders are mostly small businesses and organizations along with some federal and state land management agencies. They have no obligation to work in support of the strategic plan, and they will differ in their ability to participate in these efforts. But regardless of their level of engagement, the frontline stakeholders are crucial to the implementation of the strategic plan and the success of the tourism sector – they alone deliver on the Montana Brand promise and provide quality visitor experiences. Those that do take an active role can reap concrete benefits such as leveraging to expand the reach and effectiveness of marketing, stronger business and marketing capabilities, and improved customer satisfaction.

The **core stakeholders** who will take the lead in implementing the Strategic Plan consist primarily of the public sector or non-profit entities who work on behalf of Montana's tourism businesses and organizations. For those that receive public funding from the Bed Tax, implementation of the Strategic Plan is an important part of their mandate. For other organizations, undertaking long term strategic activities to strengthen tourism in a sustainable way is central to their mission, and the Strategic Plan is a tool that they can voluntarily use to help guide and leverage their efforts and resources.

Montana's Tourism Stakeholders

State-level Core Stakeholders	Local / Regional Core Stakeholders	Frontline Stakeholders
Montana Office of Tourism (MTOT)	Tourism Regions	Lodging
Tourism Advisory Council (TAC)	Convention & Visitors' Bureaus (CVBs)	Attractions
Institute for Tourism and Recreation Research (ITRR)	Tourism Business Improvement Districts (TBIDs)	Guides/Outfitters
Montana Heritage Commission	Tourism Programs of the Indian Nations of Montana	Visitor Information Centers (VICs)
Montana State Parks	Chambers of Commerce	Tourism-Related Retail
		Federal and State Land Management Agencies
		Tourism Trade & Industry Associations

For Montana's TOURISM STAKEHOLDERS, promoting or providing the Montana tourism experience is a core function, by mandate or by choice. Coordination and collaboration allow stakeholders to leverage their efforts and resources to achieve greater success.

Montana's Bed Tax Funded Stakeholders

Each of Montana's bed tax funded stakeholders has a special role to play in supporting the Montana tourism industry.

The Montana Office of Tourism, a division of the Montana Department of Commerce, provides leadership for the Montana tourism community and operates numerous programs designed to develop and promote Montana as an attractive destination for visitors from around the world. MTOT is responsible for state tourism websites for visitors (www.visitmt.com, www.skimt.com, www.wintermt.com, and www.getlostmt.com) and intranet websites to provide information for tourism stakeholders (www.travelmontana.mt.gov and www.montanatourismnews.org).

The Tourism Advisory Council does not receive direct funding from the bed tax, but is charged with setting policy for the use of bed tax funds by Tourism Regions and CVBs. The council also advises MTOT and the Governor on tourism-related matters and provides direction for the tourism research conducted by ITRR. Council members are appointed by the Governor to represent Montana's statewide tourism interests using their experience in tourism businesses and non-profits, heritage preservation, arts and culture, and as representatives of Tribal Nations. See www.travelmontana.org/tac/tac.asp

The Institute for Tourism & Recreation Research at the University of Montana collects data and conducts research and analysis to inform tourism and recreation in Montana. Research reports and data are publicly available online at www.itrr.umt.edu.

Tourism Regions provide tourism promotion and development throughout Montana's towns and rural areas. The six regions are Glacier Country, Central Montana, Missouri River Country, Southeast Montana, Yellowstone Country, and Southwest Montana.

www.glaciermt.com
www.centralmontana.com
www.missouririver.visitmt.com
www.southeastmontana.com
www.visityellowstonecountry.com
www.southwestmt.com

Convention & Visitors' Bureaus promote and develop tourism in communities and resort areas that generate a significant level of lodging tax collections. The following twelve cities currently have CVBs:

Big Sky:	www.bigskychamber.com/cvb
Billings:	www.visitbillings.com
Bozeman:	www.bozemancvb.com
Butte:	www.buttecvb.com
Great Falls:	www.genuinemontana.com
Helena:	www.helenamt.com
Kalispell:	www.discoverkalispell.com
Miles City:	www.milescitychamber.com
Missoula:	www.destinationmissoula.org
Sidney:	www.sidneymt.com
W. Yellowstone:	destinationyellowstone.com
Whitefish:	www.explorewhitefish.com

The Montana Heritage Preservation and Development Commission preserves and manages the iconic historic resources in Virginia City, Nevada City, and Reeder's Alley.
See www.montanaheritagecommission.mt.gov.

The Montana Department of Fish, Wildlife & Parks receives bed tax funds to help maintain visitor facilities in state parks.
See www.stateparks.mt.gov.

The Montana Historical Society receives bed tax funds to help support historic sites and roadside interpretive signs.
See www.mhs.mt.gov.

Virginia City, Montana

Montana's Tourism Partners

Many other organizations play an important role in creating, preserving, and delivering important aspects of the Montana visitor experience. With complementary mandates and objectives, Montana's Tourism Partners are another important group of willing participants in the implementation of the Strategic Plan. Joining forces to implement the Strategic Plan offers a way to work together to better achieve shared goals. Working in partnership with these organizations is essential to the successful implementation of this Strategic Plan and to the long term success of Montana's tourism industry.

Montana's Tourism Partners

State Agencies, Commissions, & Programs:
Montana Main Street Program
Montana Arts Council
Montana Historical Society
Montana Fish, Wildlife & Parks
State Tribal Econ. Devel. Commission
Montana Dept. of Transportation
Montana Dept. of Commerce
Montana Heritage Commission
Montana Dept. of Revenue
Montana Dept. of Natural Resources & Conservation
Montana Office of Indian Affairs
Montana Universities & Colleges

Tribal Organizations:
Montana Indian Business Alliance
Tribal Tourism Programs

Federal Agencies:
National Park Service
U.S. Forest Service
U.S. Fish & Wildlife Service
Bureau of Land Management
U.S. Army Corps of Engineers
Bureau of Reclamation

Business & Non-Profit Organizations:
Economic Development Corporations
Montana Economic Developers Assoc.
Local Historical and Preservation Societies
Organizations supporting the arts, recreation, sportsmen, conservation, etc.

Elected & Appointed Officials:
City, County, Tribal, State, & Federal

The Strategic Planning Process and the Way Forward

Open Window Consulting, LLC, a Montana-based small business, was contracted to develop and produce the 2013-2017 Montana Tourism & Recreation Strategic Plan. From October through mid-December 2012, extensive stakeholder input was collected. Twenty-three community sessions were held throughout the state, with over 300 tourism stakeholders participating. An online questionnaire was used to facilitate additional input, and received over 120 responses. Discussions were also held with key public sector stakeholders, including the Montana Office of Tourism, the Tourism Advisory Council, the Tourism Regions and Convention and Visitors' Bureaus; and with tourism partners including the U.S. Forest Service, Bureau of Land Management, U.S. Army Corps of Engineers, Montana Fish, Wildlife & Parks, and the Montana Department of Transportation.

Research and analysis was conducted to provide insights into the changing marketplace for tourism, deeper understanding of the challenges with which Montana's tourism industry is grappling, and up to date information on emerging trends and opportunities. Benchmarking against the tourism promotion efforts of other states and neighboring Canadian provinces offered additional insights and best practices. The draft strategic plan was submitted for public comment in February 2013. Comments were collected using an online survey tool and outreach to key stakeholders. The strategic plan was finalized in June, 2013.

The global tourism sector has undergone significant changes in recent years, driven by rapid advances in communications technology that have radically altered the ways in which travelers seek out and use information, increased traveler expectations, and changed the way people travel. Tourism is by nature a highly fragmented sector, comprised of many small stakeholders, making rapid change even more overwhelming. However, outreach during the strategic planning process showed many key stakeholders and partners who were poised to move forward. The Montana Office of Tourism is reaching out more actively than ever to support frontline stakeholders. The Tourism Advisory Council is actively reviewing their oversight practices to reduce administrative burdens for the Regions and CVBs. The Regions and CVBs are eager to innovate to better promote and develop tourism in their areas. Key tourism partners, including public land management agencies, invite greater cooperation and active partnership with the tourism community. And frontline businesses and organizations seek guidance to help them improve their delivery of the Montana experience and strengthen the economic success of the sector.

Montana's natural, cultural, heritage, and recreational assets position the industry well to capitalize on the improving economic trends and the interests of geotravelers. And the Montana tourism community is poised to build upon the foundations of success to further strengthen the tourism industry and its role in Montana.

Three High-Level Strategic Goals

All strategies, strategic actions, and implementing activities are expected to meet at least one of the three high-level strategic goals. These three high-level strategic goals are:

1. *Improved Economic Benefits*
2. *Preservation of Assets and Quality of Life*
3. *Improved Visitor Experience*

The first two high-level goals are about maximizing and balancing the benefits of tourism for Montanans. The third goal of improving the visitor experience is essential to building long-term sustained competitiveness for Montana in the tourism marketplace. Each goal is described in more detail below.

Goal 1: Improved Economic Benefits

Tourism is an economic and business activity that has become increasingly important to Montana's economy. It is currently the second largest economic sector in Montana, second only to agricultural production.

Every Montana tourism stakeholder has an interest in increasing the economic benefits, although each will interpret the goal and work toward it in a different way. For some, the primary economic goal will be increased revenues or a smoothing of revenues across seasons. For others it may be more dollars flowing to downtown businesses, fewer vacant storefronts, and a better survival rate among those businesses. The economic goal might be to diversify the economic base of a small town or the income of a small farm or ranch. It might be creating more or better jobs; or increasing lodging tax collections; or creating a bigger market for Montana products.

Whatever the focus of each stakeholder, the combined efforts will increase the economic benefits from tourism and produce a stronger, more sustainable economy for Montana.

Goal 2: Preservation of Assets and Quality of Life

The things that make Montana so appealing to its non-resident visitors are the same things that Montanans love and value about their state. The beauty and recreational opportunities offered by Montana's natural assets; the culture, history, and heritage; the character of Montana's residents; Montanans' way of life and the quality of life – these are things that Montanans wish to protect and preserve. Montana's tourism stakeholders also recognize the importance of these assets to the long-term viability of the tourism industry.

As with the goal of improved economic benefits, the goal of preservation will be interpreted and pursued differently by the diverse tourism stakeholders. Some will focus on preservation of Montana's natural assets, or on access to them. Others will work for the preservation and enhancement of cultural or heritage assets. Still others will focus on preserving Montana's agricultural communities, the small town way of life, or the overall quality of life Montanans enjoy.

Tourism supports good stewardship – by giving economic value to preservation and providing resources to carry it out. In turn, good stewardship helps ensure the long-term sustainability and success of Montana's tourism industry.

Goal 3: Improved Visitor Experience

Improving the non-resident visitors' experience is essential to Montana's long term competitiveness and success in the global tourism marketplace. As in any business, satisfied customers are return customers and their word-of-mouth praises are the best marketing there is.

Every Montana tourism stakeholder can contribute to an improved visitor experience, whether it is inspiring the visitor with credible and deliverable marketing, improving the quality of amenities and attractions, making a commitment to professionalism, helping visitors find what they seek, or greeting them with a sincere smile.

Unifying Montana's tourism sector around the goal of understanding, meeting, and exceeding visitor needs and desires lies at the heart of the strategic approach.

Five High-Level Strategies

To achieve the three high-level goals, the Montana tourism community will work individually and collectively to implement five high-level strategies. Within each high-level strategy, a number of strategic actions are recommended to guide implementation. Stakeholders can choose from among these actions. They may also devise other strategic actions over time, adding successful innovations to the strategic plan. The five strategies are:

1. *Communicate and deliver Montana's "Spectacular Unspoiled Nature" in a way that makes it real, tangible, and accessible to the visitors*
2. *Highlight and Help Develop "Vibrant and Charming Small Towns" throughout Montana.*
3. *Integrate nature and towns to offer and deliver a balance of "Breathtaking Experiences & Relaxing Hospitality"*
4. *Serve the information and infrastructure needs of Montana's visitors.*
5. *Provide support for Montana's tourism industry.*

Since 2008 Montana has worked to implement a strong, credible, and differentiating destination brand. Because the Montana Brand captures the essential attributes that differentiate Montana from its competitors, it can provide a strategic roadmap to guide marketing, promotion, and product development. The first three strategies of the Strategic Plan pursue the continued implementation of the Montana Brand, effectively, consistently, and thoroughly.

The fourth strategy supports nonresident visitors, drawing them to Montana and facilitating the planning and enjoyment of an exceptional trip. The fifth strategy supports and strengthens the Montana tourism industry. Each Strategy is described in detail below.

Strategy 1: Communicate and deliver Montana's "spectacular unspoiled nature" in a way that makes it real, tangible, and accessible to the visitor

Montana's first brand pillar promises the visitor "more spectacular unspoiled nature than anywhere in the lower 48" – a claim that was found to be strong, credible, and differentiating by Montana's visitors, potential visitors and residents. Montana's natural wonders set the state apart as a visitor destination; yet the presence of a spectacular natural setting is not itself sufficient to make Montana the destination choice of non-resident visitors. Potential visitors – particularly first-time visitors – need to:

- associate the images of spectacular unspoiled nature with an *experience* offered by Montana;
- feel confident that they can *access* that natural environment and enjoy it in a specific way;
- be aware of the full range of diverse landscapes and environments Montana offers;
- be aware of the unique recreational, cultural and other experiential opportunities offered by specific locations, so that they can build an itinerary; and
- build a sense of great excitement about the unique setting that Montana offers for their activities.

Strategy 2: Highlight and help develop "vibrant and charming small towns" throughout Montana

Montana's branding research showed that the sense of remoteness that comes along with the state's "spectacular unspoiled nature" can deter non-residents from traveling to Montana. To attract visitors, Montana's spectacular nature needs to be balanced with a sense of comfort that comes from knowing that there are communities nestled in that natural setting that offer visitor services as well as hospitality and charm (Bento, 2008). To that end, the promise in Montana's second brand pillar, "vibrant and charming small towns that serve as gateways to Montana's natural wonders," needs to be made concrete and credible to visitors.

As with the first brand pillar, the promise of vibrant and charming small towns will be further strengthened by:

- highlighting Montana's charming towns – the gems – for potential visitors;
- highlighting the most charming and desirable amenities found in each town –arts, culture, culinary, lodging, heritage, Montana-made and grown products, etc.;
- presenting the personality of each town (including outlying amenities) by telling its unique story; and
- encouraging and assisting Montana's communities in developing their assets to become more vibrant and charming.

Strategy 3: Integrate nature and towns to offer and deliver a balance of "breathtaking experiences" & "relaxing hospitality"

Montana's third brand pillar brings the first two together. It *melds* the spectacular, unspoiled nature (pillar 1) and the charming and vibrant small towns (pillar 2) to promise a unique, complete, and balanced visitor experience.

Breathtaking experiences and relaxing hospitality are complementary – they are the yin and the yang that make the Montana visitor experience so special. Montana's visitor information plays two crucial roles: (1) making the potential visitor aware of this special chemistry; and then (2) helping the visitor to plan a trip that successfully combines the two elements to *deliver* that special visitor experience.

A growing number of today's visitors – particularly the geotraveler – are seeking experiences, rather than "sights". The "best tourism places … provide the visitor with a special experience that is deeply felt and long remembered" (Lew, 2011)

Presenting and delivering this cohesive experience is challenging but essential to deliver on the Montana Brand promise. The "Montana experience" is comprised of many products and services, produced by many independent stakeholders from the public, private, and non-profit sectors. Integration of these many components requires greater collaboration, but opens the door to stronger partnerships and shared benefits.

The balanced brand promise of "breathtaking experiences… and relaxing hospitality" will be strengthened by incorporating it into the images and messaging of marketing and visitor information materials. This is accomplished by:

- showing a balance of exhilaration and relaxation…adventure and comfort…untouched nature and human society…rugged trails and fine arts, culture, heritage;
- making a clear connection between the natural wonders and the welcoming communities that serve as gateways;

- » helping visitors plan a multi-destination trip by easily locating and stringing together multiple gateway towns and all of the experiences to be accessed in between; and
- » ensuring that the sense of a cohesive "vacation experience" is not lost when trip plans cross from one tourism region into the next.

Strategy 4: Serve the information and infrastructure needs of the visitor

This Strategy supports a quality visitor experience by making it easier for visitors to select Montana, plan a trip, and access any on-the-ground information they might need after arriving.

Montana's brand research found that potential visitors are attracted to the great outdoors and the spirit of adventure offered by Montana; however, these positive attributes can be outweighed by concerns about remoteness or the lack of comfort and services (Bento, 2008). These concerns or uncertainties make Montana a "risky" destination – there is a chance that the experience will not be entirely good. To convert potential visitors it is essential to reduce the perceived risk of a bad experience by providing content-rich, brand consistent visitor information to support the destination choice.

In the trip planning phase, good and ample information – including itinerary ideas – can encourage and facilitate longer trips and multi-destination trips that extend beyond the main travel corridors.

Good information remains the fundamental stock in trade for attracting and supporting the visitor.

However, meeting the information needs of visitors has become increasingly challenging. New information and communications technologies have changed how travelers obtain information, what information they want, and how they use that information. This poses a particular budgetary issue for Montana's tourism stakeholders, with multiple new technologies supplementing, not replacing, traditional information sources. In the current environment, tourism stakeholders can neither ignore new technologies nor invest heavily in technologies whose benefits are not fully proven.

This strategy aims to coordinate efforts not only to *deliver* information to the visitor, but also to *discover* the visitors' evolving information needs. It requires a commitment to evaluating and re-evaluating the most effective and viable way to meet those evolving information needs. Included in the strategy are consideration of online and mobile information, print information, on the ground visitor resources, social media and interaction, electronic word-of-mouth, and e-transaction capabilities.

In addition to visitors' information needs, this Strategy addresses the importance of transportation infrastructure and seeks to foster greater coordination and partnership to pursue infrastructure improvements, including increased air service to Montana, capturing the full potential of scenic byways programs, and ensuring that public lands are accessible.

Strategy 5: Provide support for Montana's tourism industry

The Montana visitor experience is a complex product: comprised of many products and services, provided by many independent businesses and organizations, and scattered along a travel path that is heedless of city, county, and regional boundaries. The visitor experience is largely promised by one set of stakeholders, but delivered by a different set of stakeholders. Success requires coordination of the many stakeholders (marketers and providers) and their individual efforts. Effective communication among all stakeholders, with MTOT providing leadership and guidance, is fundamental to this strategy.

Because Montana's tourism stakeholders – even its Destination Marketing Organizations (DMOs, i.e., Regions, CVBs, Chambers of Commerce) – are overwhelmingly small businesses and organizations with limited resources and capacity, success also requires support and capacity building.

Tourism businesses and organizations rely upon Montana's DMOs to carry out traditional destination marketing and promotion – pooling and leveraging resources to achieve more than individual marketing efforts could. They rely on MTOT, Regions and CVBs to carry out successful "inbound marketing" – creating and maintaining an online presence for Montana that draws visitors in with high quality content that is inspiring, useful, and brand-consistent.

Stakeholders also rely upon the technical and financial support of MTOT to realize some larger tourism projects.

Finally, tourism stakeholders also need the support of professional organizations including MTOT, ITRR, Regions and CVBs to build the skills, knowledge, and professionalism that will help them to compete in a global tourism market and to deliver the quality experience promised by Montana's Brand.

Knowledge of market trends and a better understanding of the Montana visitor will help Montana's stakeholders to make informed decisions that lead to success. This information is difficult for each small entity to gather, but the industry's leadership can effectively produce and share it with stakeholders to the benefit of the whole tourism community.

As the tourism industry faces significant challenges driven by rapid changes in information and communications technologies, Montana's tourism marketers and providers rely on the professional skills of MTOT, Regions, CVBs, and ITRR to provide the guidance, knowledge, and skills to understand and adopt emerging technologies; to manage the effects of rapid information and communications changes; and to effectively harness valuable new business resources like electronic word-of-mouth, inbound marketing, and (online) community marketing. Providing such support enables the Montana tourism industry to compete in tourism's new business environment.

Within the full version of the strategic plan you'll find more detail on implementing each Strategic Action, including:

- Recommended tactics
- Indicators of Success
- Background and Rationale
- Resources

If you do not have the full version and would like to go beyond the executive summary and introduction to the Montana Tourism and Recreation Strategic Plan 2013-17, you can access the full plan at www.travelmontana.mt.gov/2013strategicplan/ or by contacting the Montana Office of Tourism at (406) 841-2870.