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).

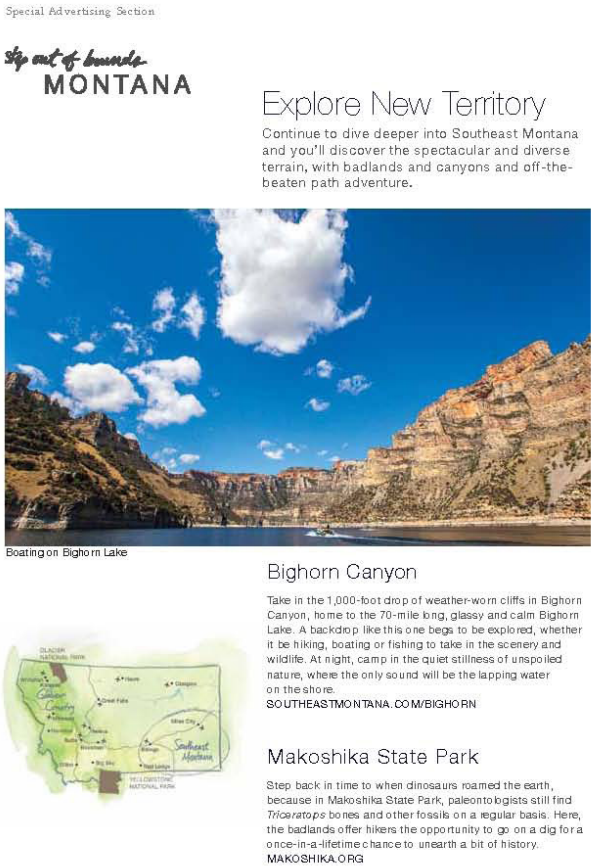
Montana's Visitor: the Geotraveler

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.

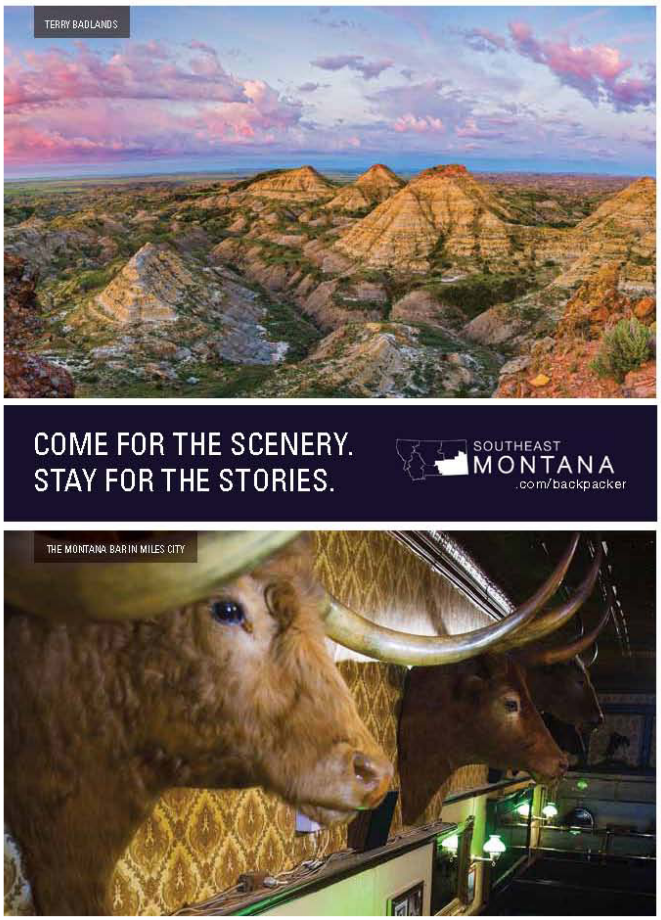
Boating on Bighorn Lake

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

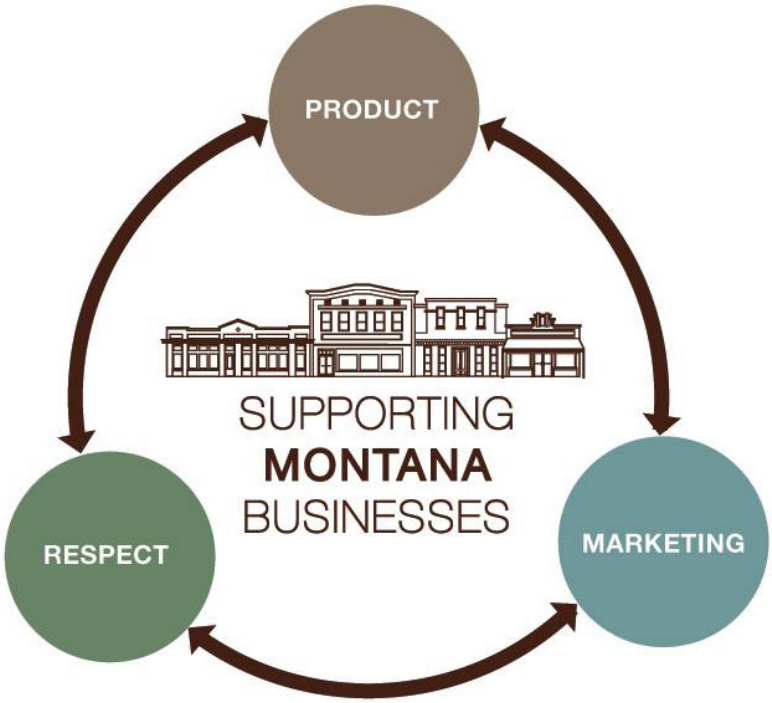
The visitor fills in their itinerary with things to see and do at the destination(s) and along the way. Regions and CVBs, Communities, Tribes, Businesses and Organizations all work together to make visitors aware of the full array of experiences available to them, encouraging them to stop and experience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

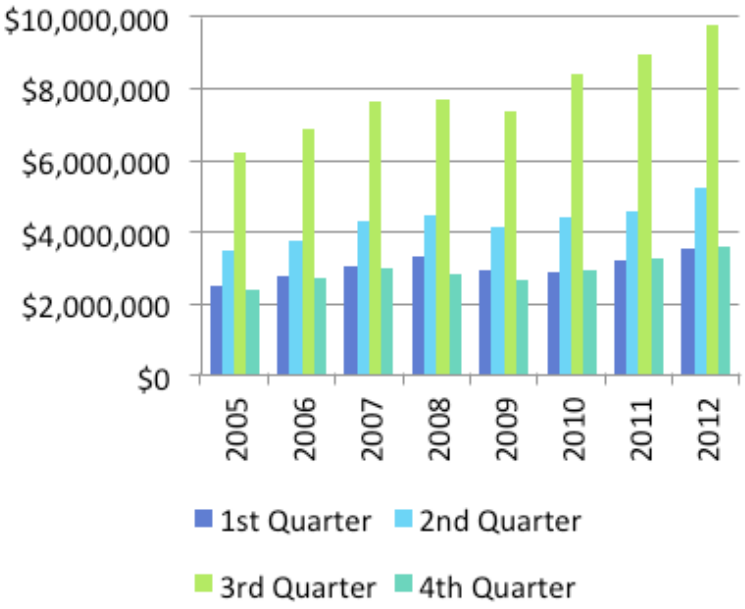
Montana's Tourism Funding

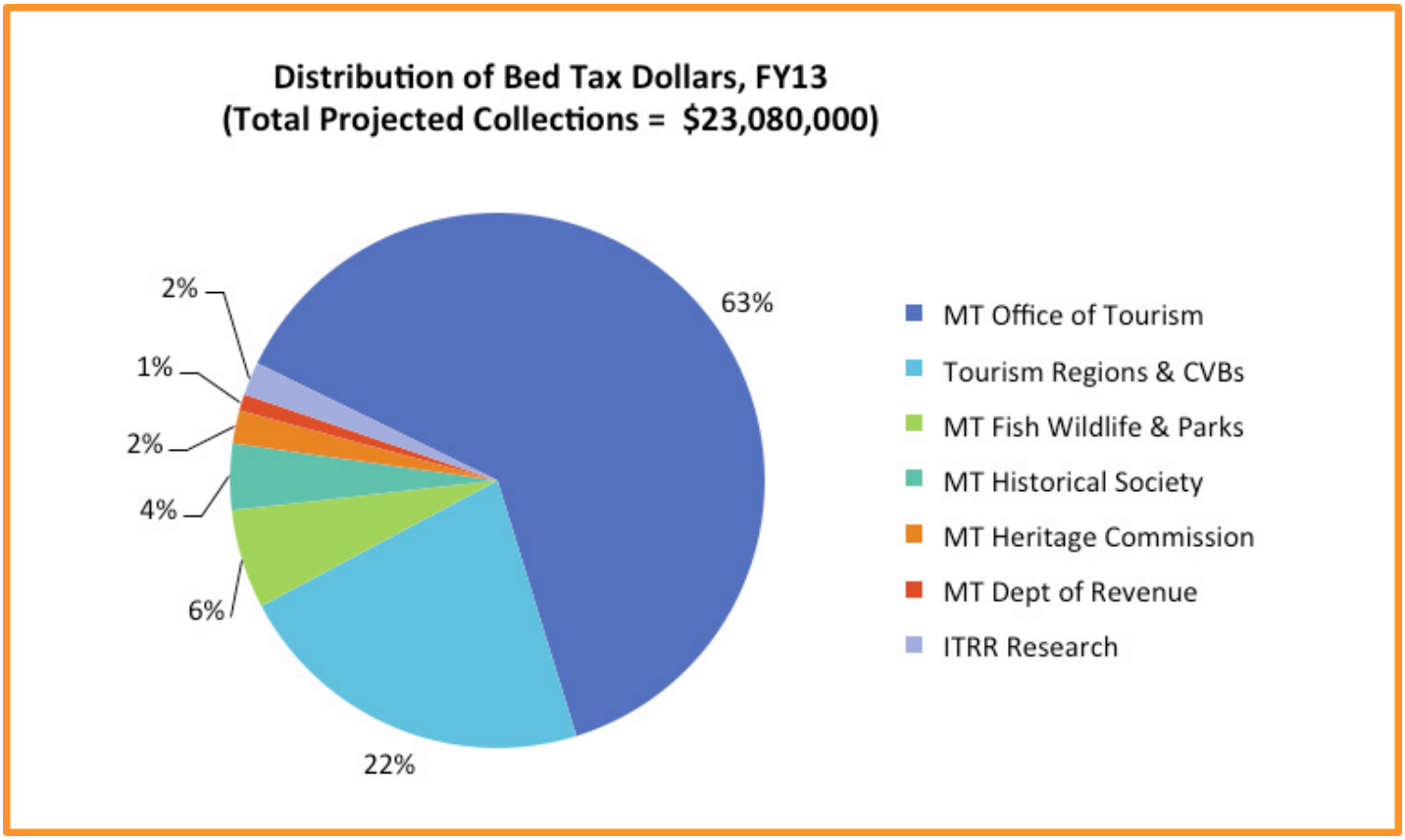
Montana collects a 7% Lodging Facility Tax from guests of hotels, motels, bed and breakfasts, resorts, guest ranches, and campgrounds. The tax has two components:

» 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.

1.1. Establish icons of "spectacular unspoiled nature" throughout Montana

This Strategic Action strengthens Montana's marketing efforts.

Recommended Tactics

TAC, MTOT, Regions, CVBs

» Jointly identify specific locations throughout the state that epitomize the diverse array of "spectacular unspoiled nature" found in Montana. Icons can be selected not only for each tourism region, but also for specific niche markets.

MTOT, Regions, CVBs, Communities, Tribes, Businesses & Organizations

Produce or select images of each icon for use in promotional campaigns and collateral and other promotion efforts.

» "Iconify" these selected locations – using their images in tourism marketing materials consistently and in a manner that evokes an emotional response, so that they become recognizable by non-resident markets and come to represent the spectacular unspoiled nature of the region in the mind of non-resident visitors.

» Work with public land management agencies to enlist their support in establishing the iconic nature of locations under their management.

Indicators of Success

» Each tourism region has identified a location(s) that epitomizes the "spectacular unspoiled nature" that the region has to offer. Locations that are iconic for specific activities have been identified.

» Images of these locations are used across marketing materials, such that they have become representative of their regions and have become recognizable to targeted non-resident markets.

» These locations become "tourism icons" for their regions – recognizable and associated with Montana by potential visitors.

Background & Rationale

"Tourism icons" are landmarks that are instantly recognizable and represent to visitors important tourist attractions or experiences. Such icons can be crucial in the marketing of destinations. An iconic image can exert a very strong marketing influence, offering an experience that *pulls* the traveler to visit the destination, and is particularly useful when the destination is relatively unknown in the marketplace. New icons can be created through a process of (1) identification, (2) marketing emphasis, and (3) interpretation to evoke certain emotions.

Yellowstone National Park and Glacier National Park are Montana's most recognizable icons. Montana's branding research concluded that the state has a number of specific locations or natural features that *could be* iconic of its spectacular unspoiled nature, but these locations are not well known outside the state or are not associated with Montana in the minds of non-residents. The branding consultant recommended development of 8-10 such icons. ITRR's Nickerson and Moisey similarly recommended the use of natural features and niche market features as icons (e.g., Virginia City and Nevada City to target visitors primarily drawn by history).

Identifying several iconic locations drawn from all six tourism regions that capture Montana's "spectacular unspoiled nature" will help the regions to market with brand consistency. Greater brand consistency strengthens the marketing power of the brand, which should improve the conversion rates of marketing efforts and bring more travelers to Montana.

Diversifying the iconic images *within* the Montana Brand will facilitate promotion of the less-visited regions, helping to balance distribution of tourism throughout the state. Through targeted marketing, these locations can become iconic for specific market segments and may help tap segments that have to date been underdeveloped. As a result, tourism could be increased in less-visited areas and seasons.

Resources

Nickerson & Moisey, 1999, *Branding a state from features to positioning: Making it simple?*, at http://www.itrr.umt.edu/articles.htm

1.1. Integrate public lands more fully and functionally into tourism information

This Strategic Action strengthens Montana's tourism product and marketing efforts.

Recommended Tactics

MTOT, Regions

» Show the location of the public lands on official tourism websites. Highlight iconic locations within those lands (see Strategic Action 1.1.).

» Make the following information more prominent on official tourism websites: access points to public lands; recreational, natural, historic, cultural, and heritage assets located on public lands; and recreational activities available and allowed on public lands.

» Link to useful maps produced by public land management agencies and other entities.

» Link to other *specific* pages of particular value to visitors from the public land agency websites (rather than the agency's home page) or request permission to pull content from them.

» Share information with each public land management agency that is useful in meeting their own mandates for the promotion of recreation on public lands; for example:

- use of agency information in tourism promotion and visitor information;
- research or data regarding public land use by non-resident visitors; and
- information regarding the Montana Brand pillars and tourism promotion activities.

» Share with public land management agencies information and insights regarding infrastructure or other visitor needs on the lands they manage.

CVBs, Communities, Tribes, Businesses & Organizations

» Make the following information more prominent on official tourism websites: access points to public lands; recreational activities available and allowed on public lands; and recreational, natural, historic, cultural, and heritage assets located on public lands.

» Work with local governments to develop information regarding city and county parks that could be important recreation assets for non-resident tourism. Provide information to MTOT and Regions for incorporation into tourism websites.

» Identify high quality local assets for outdoor recreation, such as local bike trails, favorite public sledding hills, and parks with playground equipment or other features attractive to traveling families.

Indicators of Success

» Information regarding public lands in each of the six tourism regions is readily available in a usable form on or through MTOT and regional websites.

» Information is sufficiently comprehensive for non-residents to plan activities on public lands for recreational, natural, cultural, historic, and heritage tourism.

» Visitors can easily identify opportunities to enjoy Montana's natural wonders, allowing Montana to deliver on its brand promise of "more spectacular unspoiled nature than anywhere else in the lower 48."

» Awareness of the large number of access points and activities available encourages more trips, extended trips, and more trips to less-visited areas. Thus, economic benefits are increased throughout the state.

Background & Rationale

Following is a list of agencies that manage public lands for recreational use in Montana:

» U.S. Forest Service

» U.S. National Park Service

» Bureau of Land Management

» U.S. Army Corps of Engineers

» Bureau of Reclamation

» U.S. Fish and Wildlife Service

» Montana Department of Fish, Wildlife, and Parks

Montana's vast public lands are central to delivering on its brand promise of "more spectacular unspoiled nature than anywhere else in the lower 48." Providing more substantive information regarding these public lands and how they may be accessed is essential to facilitating trip planning and will help create deliverable expectations for the non-resident visitor. Awareness of the large number of access points and activities available can encourage (i) extending the length of the trip and (ii) extending visitation to areas that would otherwise be overlooked. The result is a potential to increase economic benefits throughout the state.
The information available from public land management agencies is valuable but can be difficult or time-consuming for visitors to find. To tap this resource, the tourism sector must gather the most useful and appealing information for the potential visitor and make it readily available as part of Montana's visitor information resources (directly or through links).
Maps will be among the most important of these informational resources, particularly because non-resident visitors may be unfamiliar with many place names or have a limited sense of the distances involved. Maps allow visitors to build a realistic itinerary.

Montana's tourism promotion bodies and public land management agencies share a number of goals, making theirs a natural partnership. Raising awareness and appreciation of Montana's public lands and their full recreation potential supports the *mutual* goals of promoting recreation, supporting preservation, and ensuring appropriate recreational use by visitors. To help strengthen the partnership, tourism stakeholders should let public land management agencies know when they are linking to their information in tourism sites and acknowledge the value their work. Unilaterally sharing research, data, or other information regarding visitors' use of the public lands can also build stronger inter-agency partnership.

1.3. Present natural assets in an experiential manner

This Strategic Action strengthens Montana's tourism product and marketing efforts.

Recommended Tactics

MTOT, Regions, CVBs, Communities, Tribes, Businesses & Organizations

- Use images and text in visitor information and marketing pieces that reflect not only the scenic beauty of the state or region, but the *experiences* and activities that visitors will enjoy in that setting.
- Monitor and consider trends in outdoor recreation when developing promotional materials.
- Present cultural or heritage *experiences* rather than just assets or locations; for example: taking horseback or wagon rides, or attending county fairs or rodeos, to experience the agricultural and pioneering heritage as opposed to simply seeing agricultural areas through a windshield.
- Target market segments with specific experiences that are particularly appealing to them.
- Link to electronic word-of-mouth – including travel blogs and reviews – to showcase experiences available in a particular natural setting.
- Present iconic locations (see Action 1.1.) in an experiential manner.

Indicators of Success

- Existing and developing visitor information presents Montana's spectacular nature in an experiential way. Montana is differentiated from other destinations that offer "unspoiled nature" by the "breathtaking experiences" that can be enjoyed within the natural setting, as promised by the Montana Brand.

Background & Rationale

Research consistently shows that today's traveler seeks *experiences,* rather than just attractions. It is important, then, for a visitor to know not only that Montana offers spectacular natural assets, but also what they can *do* within that setting. This allows them to start envisioning their vacation experience (making a "vacation movie") – a crucial step between having Montana on their list of places they'd like to go and actually planning and booking a trip.

Presenting Montana's spectacular natural setting in an experiential way also differentiates Montana from other places that offer similar scenery. A 2006 analysis of all 50 state tourism websites found that *most* of the sites emphasize nature and culture/heritage as their unique selling proposition. Montana's neighboring states offer many of the same scenic assets as Montana. It is important, therefore, for the potential visitor to see the superb *experience* offered in Montana's natural setting versus other similar settings.

Iconic locations (see Action 1.1.) should be selected and presented with an experiential perspective. For example, if the Yellowstone River were to be used, it can be shown with paddlers or fishermen.

A 2010 U.S. Forest Service assessment (U.S. Department of Agriculture, Forest Service, 2012) found that outdoor recreational participation is growing, and that activity choices are changing. Viewing natural scenery, flora, and wildlife continue to be the most common activities, with more than half the population participating in each and participation growing by 18% to 25% from the early-2000s through recent years. Participation in birding, as another example, grew by almost 23% over that period to top one-third of the

population. While participation in non-motorized water-sports is still less common (less than 10% of the population), it is growing rapidly, including a 103% increase in kayaking. These trends can help to guide targeted marketing and the experiential presentation of Montana's natural assets in promotional efforts. Allowing visitors to leave "trip reports", travel blogs, or reviews of their experiences in Montana on visitor information sites adds the credibility of word-of-mouth recommendations. Links to reviews or travel blogs on other travel sites also serve this purpose. Particularly enthusiastic reviews can be highlighted in visitor information to help inspire potential travelers.

Resources

See research available from the Outdoor Foundation at http://www.outdoorfoundation.org/
Excellent information regarding the "buy cycle" of travelers: *European Segmentation Study: Alberta Summary*, by Insignia Market Research, 2008, especially pp.15-16, at http://industry.travelalberta.com/Markets/~/media/Industry/Attachments/Markets/Research/AlbertaSummary2008.ashx

1.4. Participate in planning processes for public lands management

This Strategic Action strengthens Montana's tourism product and builds respect for the tourism industry in Montana.

Recommended Tactics

MTOT

- Clearly and consistently state the importance of public land management for tourism in Montana. Clearly state MTOT's commitment to leading active involvement by the tourism community.
- Identify a point of contact with whom the tourism community can actively engage for each of the public land management agencies. Reach out to this point of contact to initiate an *active* partnership between tourism and the agency.
- When authorized by the administration, work with public land management agencies to identify and address issues of access and visitor service needs on public lands (see Strategic Action 4.7.).
- When authorized by the administration, represent the tourism sector in planning processes, through document reviews, and by communicating directly with land management agencies regarding tourism interests, research, and initiatives.
- Encourage tourism stakeholders to participate in the public land management process. Coordinate the sharing of background information to support accurate, consistent, and effective representation of tourism interests (see Strategic Action 5.1.).

Regions, CVBs, Communities, Tribes, Businesses & Organizations

- Become an active and informed participant in public planning processes for public lands in the area. Monitor the management agency(ies) website(s) for important planning documents or planning activities; let others in the area know about important issues or developments; and participate in public comment opportunities.
- Find other involved tourism stakeholders – in your community, your region, or the state – and coordinate your efforts. Share background information, insights, and tourism talking points to represent tourism's interests more effectively, more consistently, and with less effort.

Indicators of Success

- The Montana tourism community is recognized by public land managers and by the public as an active partner in public land management processes.
- MTOT's coordination allows MTOT and other stakeholders to efficiently convey a tourism perspective whenever needed.
- Tourism interests are considered in all key decisions regarding management, access, and alternate uses of public lands, so that Montana can deliver on its brand promise of "spectacular unspoiled nature" now and into the future.
- MTOT and key stakeholders provide the tourism perspective for use in planning documents, where appropriate.

- The tourism community is aware of public lands planning processes, and is well informed regarding planning issues relevant to tourism.
- Tourism stakeholders participate in public forums for public land management planning, or provide input through other means.

Background & Rationale

Public lands are an important asset for Montana's tourism sector. Management agencies preserve, maintain, and promote these lands in large part for recreation, contributing significantly to Montana's "spectacular unspoiled nature". Management of these lands and access to them holds important implications for the long term success of Montana's tourism industry. As new management plans are developed for each public land area over the coming years, it will be important for MTOT and the tourism community to provide input so that tourism interests are considered in decisions regarding management and alternate uses of these lands.

Participation of tourism interests in public lands management also offers benefits for the public land management agencies, by ensuring that preservation and recreation goals receive public support. Participating in the document review process for each management plan offers a way for MTOT to efficiently and effectively represent the tourism perspective, raise concerns, and contribute solutions. Establishing the key elements of MTOT's (and the tourism industry's) position – clearly, concisely, and as early as possible – can further minimize the time needed to provide input and can also improve the consistency of that input across planning processes.

Key planning processes for tourism community involvement include the following:

- U.S. Forest Service Lands: National Forest Plan Revisions for each National Forest.
- U.S. National Park Service: Revision of planning documents related to Yellowstone and Glacier National Parks, national historic sites, and the national register of historic places.
- U.S. Bureau of Land Management Lands: Resource Management Plan revisions for each BLM region.
- U.S. Army Corps of Engineers: Planning for Fort Peck Dam, Libby Dam, and Lake Koocanusa.
- U.S. Bureau of Reclamation: Resource Management Plan revisions for nine reservoirs, Canyon Ferry Lake, and (through NPS management) Bighorn Canyon National Recreation Area.
- U.S. Fish & Wildlife Service: Planning for each of the 21 wildlife refuges and five wetlands managed in Montana.
- Montana Department of Fish, Wildlife, and Parks: Management Plan revisions for each Montana state park; 2014-2018 Statewide Comprehensive Outdoor Recreation Plan (SCORP). See http://stateparks.mt.gov/about-us/parksData.html.

2.1. Highlight Montana's vibrant and charming small towns

This Strategic Action strengthens Montana's tourism marketing efforts.

Recommended Tactics

TAC, MTOT, Regions

» Collaborate on ways to highlight and assist in the development of Montana's "vibrant and charming small towns."

MTOT, Regions, Tribes

» Highlight vibrant and charming small towns, their arts, culture, events and amenities in visitor information and identify their location clearly.

» Assist Montana communities' efforts to "tell their story" (see Strategic Action 2.2.) and use their story (arts, culture, heritage, events, amenities, etc) to attract visitors.

» Create traveler tips or itinerary ideas that link vibrant and charming small towns together, and link them to the main travel corridors for visitors.

» Highlight Montana's vibrant and charming small towns, their arts, culture, events and amenities in marketing materials to strengthen the Montana Brand.

Indicators of Success

» Montana's "vibrant and charming small towns" are highlighted in Montana's visitor information and their location is clearly identified on the Montana map.

» Images of these towns are used across marketing materials to strengthen the Brand pillar.

Background & Rationale

Research shows the importance of reducing the perceived "riskiness" of a destination by assuring travelers that the amenities, services, and comfort that they seek will be available. Montana's branding research reiterated the importance of providing information to mitigate visitors' perception of the state's remoteness. Visitors need reassurance that the comfort, services, and amenities they seek are available in Montana. The Montana Brand promise of "vibrant and charming small towns" serves this purpose, but that promise must be credible. It is important for the visitor who values very charming small towns to be able to identify those towns, perceive their vibrancy and charm, and find their geographic locations when planning an itinerary.

ITRR data indicate that Montana's non-resident visitors largely undertake *multi-destination* trips, rather than staying in one town. This increases the importance of highlighting a number of towns that could serve as the basis of visitor itineraries. Awareness of these towns could also encourage more travelers to extend their itinerary outside the main travel corridors.

Delivering on the brand promise by helping visitors to find vibrant and charming small towns will improve the visitor experience and visitor satisfaction, contributing to extended stays, return visits, and positive word-of-mouth.

Highlighting the "gems" among Montana's many charming small towns has the additional benefits of strengthening community pride; building respect by highlighting the benefits of tourism; and encouraging other communities to come together to improve their towns' vibrancy and charm.

2.2. Highlight the most charming and desirable elements of each community in visitor information

This Strategic Action strengthens Montana's tourism marketing efforts, and builds respect for the tourism industry in Montana.

Recommended Tactics

MTOT, Regions

» Ensure that visitor information prominently highlights the most charming and desirable amenities identified in each town.

» Incorporate any content generated through MTOT-led events such as the community tourism workshops held throughout the state ("*Coming Together to Expand Montana's Tourism Story*").

» Work closely with the Montana Main Street program to leverage and coordinate efforts.

CVBs, Communities, Tribes

» Identify the most charming and vibrant assets and amenities of the town from the visitor's perspective – things that a visitor might mention in a postcard or post on an online community or review site.

» Incorporate any content generated through MTOT-led events such as the community tourism workshops held throughout the state ("*Coming Together to Expand Montana's Tourism Story*").

» Present the most charming aspects of the town experientially, so that visitors can imagine experiencing and enjoying them.

» Connect with the potential visitor by telling the unique "story" of the town – drawing on local history, characters, the arts, annual events, etc. Project (i) authenticity, (ii) uniqueness, and (iii) a sense of "relaxing hospitality" and "comfort" for visitors.

» Use ratings and review sites and other electronic word-of-mouth (e.g., TripAdvisor, online community discussions) to help identify the best amenities and link to reviews to strengthen credibility and reduce risk for the visitor.

» Include the arts and culture such as performing arts, art galleries and markets, art walks and other cultural activities.

» Periodically re-evaluate the choice of charming and desirable elements, including consulting online travel review sites for fresh perspective.

» Make the local community aware of the visitor information and the way it presents the community, to help build and broaden local pride.

Indicators of Success

» Visitor information presents each town in a way that immediately highlights the best elements from the visitors' perspective. The charm and personality of each town and the most desirable amenities and services for travelers are all easy for visitors to discover.

- Each town's story and information regarding local events help build a personal connection with potential visitors and meets a growing desire for authenticity.
- The presentation of each town provides an appealing sense of the experience a visitor will have rather than a list of place names.
- The visitor can perceive the richness and variety of experiences to be found in the community.
- Visitors are confident that amenities are available and appealing, and therefore do not perceive Montana to be a "risky" destination. Visitors may be drawn to plan longer trips to include more towns in their multi-destination itineraries or to extend their itinerary beyond the current common travel corridors.
- Montana's Brand promise of charming towns is more credible, and the state delivers on the promise.

Background & Rationale

Research shows the importance of reducing the perceived "riskiness" of a destination by assuring travelers that the amenities, services, and comfort that they seek are available in Montana's small towns. While a list of hotels and restaurants can assure travelers that there will be a place to eat or sleep, it does not assure visitors of the "comfort" they desire. By highlighting the most "charming" amenities, visitor information can pull in visitors by (i) giving assurance of "comfort", (ii) helping establish a unique and appealing "sense of place", and (iii) helping the visitor build expectations of the *experience* that is offered in the town.

In many community sessions, particularly in less visited areas or areas where most travelers were just passing through, stakeholders expressed a desire to increase tourism marginally – a few more visitors stopping for lunch or a snack or to visit the local museum. Tourism today is highly *experiential,* and even the smallest of towns can offer the traveler a *memorable* short break. It may be a stop on the Montana Dinosaur Trail or stepping into the local soda fountain or diner for the *best* huckleberry milkshake yet (even better than the one they found yesterday). It could be stopping to watch glassblowers in Corvallis to break up the drive or looping along the "Bale Trail" to make getting there half the fun. It could be homemade soup for lunch at the corner cafe or dinner at one of Montana's fabulous restaurants hidden off the beaten track. By highlighting those things that can contribute something special to the visitor's larger vacation experience, these small towns can increase their tourism in an incremental but meaningful way.

The visitor experience can also benefit from the "little things" that offer comfort – welcoming coffee shops or cozy restaurants, nice places to take a stroll or a hike, lodging that makes you want to settle right in, quaint downtowns or interesting architecture. Their charm may derive from physical attributes or from experiential attributes.

Local events – such as farmers' markets, street music, arts festivals, and evening art walks – add charm and help the visitor feel a connection to the town. The arts offer an additional facet to the visitor experience offered by the community, adding richness and diversity.

The Montana Main Street Program, within the Montana Department of Commerce, is a valuable resource for communities seeking to leverage their efforts and coordinate with other small Montana towns.
Using review sites and travel blogs to identify the most charming aspects of a town improves the chances

that the selection fits with the *visitors' perspective*. These websites have been shown to provide trusted word-of-mouth recommendations. Linking to such sites and reviews from official tourism information leverages that credibility and offers the visitor "objective" praise to back up the promises of an official tourism site. Many other resources exist to produce the "story" of a town. Tap the knowledge of local volunteers, civic leaders, or amateur historians who have worked to preserve the heritage of the community. Look to existing historical or cultural studies of the town completed by third parties. For example, the BLM's commemoration of the 150th anniversary of the 1862 Homestead Act has produced stories and images related to a number of towns around the state. Yellowstone Public Radio has produced many narratives on local towns, characters, and history around the state. Many books have been published on the history of small Montana towns. Draw upon these sources and others for inspiration, link to existing materials, or use excerpts from published works (within the bounds of "fair use" guidelines).

Research has shown the power of telling the authentic story of a place. It is cultural differences that give most places their distinctiveness. Stories and anecdotes make a community more meaningful and attractive, helping visitors to form an emotional connection. They can be informative and inspirational.

MTOT's 2010 study on the visitor's travel planning process provides confirmation of the importance of conveying excitement rather than simply providing functional information. As one traveler explained, "what I like… [is] a little blurb about why I should go there or see that or what's worth experiencing. There's a depth, some perspective and it's like finding little treasures, little gems."

Telling the stories of Montana's towns has the *collective* effect of giving nonresident visitors a richer sense of Montana's culture and history and adds credibility to the Brand promise of charming small towns. In addition, telling the unique individual stories of each town allows communities to differentiate themselves *within* the Montana Brand. Because Montana's nonresident visitors tend to take *multi-destination* trips, it is important to remember that this differentiation is not intended to lure visitors away from surrounding towns, but rather allows the visitor to plan a trip that includes stops in your town *and* other towns on their route. This will lead to a better distribution of tourism throughout the state, particularly if it induces travelers to stop along the way rather than traveling quickly and directly to their primary destination.

Resources

"Geo-Travelers and Travel Planning" at http://www.travelmontana.mt.gov/newsandupdates/mtotpublications2010.pdf
The Montana Main Street Program at www.mtmainstreet.mt.gov
Travel blogs can help identify the best attributes of a town from a visitor's perspective. Search for mention of your community at www.blogsearch.google.com using the search terms "travel blog" and the town name
Materials produced by the BLM to commemorate the Homestead Act, found at http://homesteadingmontana.org/
Narratives produced by Yellowstone Public Radio, found at www.ypradio.org.

2.3. Evaluate and pursue essential local wayfinding solutions

This Strategic Action strengthens Montana's tourism product.

Recommended Tactics

MTOT, Regions, CVBs

- Serve as a facilitator for communities and a liaison with the Montana Department of Transportation (MDT) in addressing wayfinding and highway signage needs.
- Explore the possibility of creating a coordinated highway signage program for communities around the state that would use economies of scale to reduce costs, improve consistency, and strengthen the Montana Brand. Communicate closely with CVBs and communities.
- Provide guidance on signage solutions that (i) meet well-justified needs; (ii) avoid clutter; and (iii) meet MDT regulations.
- Include success stories in the Resource Library, and encourage their submission.

CVBs, Communities, Tribes, Businesses & Organizations

- Assess the need for local wayfinding solutions or highway signage. Evaluate the expected benefits critically (e.g., by developing a business case) to determine how significant they could be and how likely the benefits are to materialize. Prioritize needs and seek out affordable, creative solutions.
- Understand all city, county, state, or federal (highway) codes that regulate the use of signage. Work with the Montana Department of Transportation and MTOT to ensure understanding of state and federal regulations.
- Work closely with MTOT and other communities to support and adopt a coordinated approach to signage.
- Share successful approaches to local wayfinding with other communities through MTOT and media coverage.

Indicators of Success

- Increased visitation to towns, attractions, and amenities due to increased visitor awareness or ability to locate them.
- Effective and affordable approaches to local wayfinding are devised and shared among communities, including a business case to pursue such efforts.
- Stakeholders have clear guidance on highway signage regulations and a clear process for pursuing signage.
- A collective approach to implementing highway signage improvements eliminates frustration, improves the quality and consistency of signage, and reduces signage clutter.

Background & Rationale

Community input sessions during the strategic planning process consistently identified stakeholder desire for improved wayfinding, concern that the cost of local wayfinding is prohibitive, and frustration in regard to regulatory restrictions on highway signage.

A collective approach to highway signage could reduce the time, effort, frustration, and expense for communities. Approaching highway signage as a state-wide effort rather than individually eliminates the need for each community to work its way through unfamiliar MDT regulations. Approaching MDT collectively, with MTOT as a facilitator, will also focus MDT's assistance, will add weight to the request, and will foster ongoing inter-agency collaboration.

Because signs are expensive to design, construct, and install, potential cost savings through coordinated design and production of signs should be fully explored. The collective approach also eliminates the need for each community to "re-invent the wheel" in designing its signs, saving time and effort.

Collective highway signage also provides consistency, which offers benefits for the visitor and for Montana tourism. Firstly, like signage for historic sites or "logo signs", having community entry signs with a consistent look helps visitors to identify the information provided. Secondly, wayfinding is part of the visitor experience and, as such, should reflect the destination brand (Denton, 2009). Developing a consistent base design for town entry signs can reinforce the Montana Brand, while encouraging a level of customization will allow communities to reflect their own unique character.

Resources

The Project for Public Spaces offers one simple guide for developing and designing a signage system at http://www.pps.org/reference/signage_guide/.
Texas-based wayfinding firm fd2s offers a thoughtful commentary on wayfinding as a part of the visitor experience in its blog at http://www.fd2s.com/2009/04/municipal-wayfinding-and-the-visitor-experience/.
Florida based communications firm, Axia Creative, provides a comprehensive look at the elements of a wayfinding system, discusses maintenance of the system, and covers other topics in its blog at http://axiac.com/axiablog/.
Examples of communities that have used existing surfaces to improve wayfinding without adding clutter:

- Victoria, British Columbia, wrapped city maps on utility boxes http://www.canadiandesignresource.ca/officialgallery/graphics/city-maps/

- The town of Matthews, NC, plans to use outdoor wall murals as part of an integrated wayfinding system (see http://matthewsnc.gov/LinkClick.aspx?fileticket=RclfJyX4_xc%3D&tabid=301) as well as a public art element. For some technical information on the durability of exterior murals see http://www.findamuralist.com/blog/exterior-mural-paints-how-to-cope-with-fading-colors.

2.4. Improve the curb appeal of towns

This Strategic Action strengthens Montana's tourism product development, and builds respect for the tourism industry in Montana.

Recommended Tactics

MTOT, Regions

» Publicize curb appeal projects within the Montana tourism industry to encourage more projects and to build respect for tourism and its benefits.

» Provide financial and technical assistance to tourism-related projects that fit the guidelines of MTOT's grants and assistance programs.

CVBs, Communities, Tribes

» Unite the local tourism (and general) community to lead and support curb appeal improvements.

» Identify ways to beautify the town, evaluate the resources needed for each, prioritize them, and implement them.

» Start with small, easily achievable improvements to build momentum.

» Enlist the support and participation of private sector partners, civic groups, and other entities to provide resources and expertise.

» Link curb appeal improvement efforts to existing local events, such as festivals, fairs, or parades. Have the primary community work session just prior to these events, so that the improvements can be noticed and celebrated by the community.

» Acknowledge curb appeal improvements made by individual businesses and organizations.

Businesses & Organizations

» Carry out projects to improve the curb appeal of your property. Ensure that any improvement efforts you might propose comply with city/county codes and obtain approval from all relevant government agencies.

» Organize the owners of adjacent properties to improve the curb appeal of the block.

» Volunteer to "adopt" a street, a local park, or other area, taking responsibility for cleaning up, maintaining physical structures, or otherwise improving its curb appeal.

» Take the lead in organizing a community-wide curb appeal improvement effort.

Indicators of Success

» More towns undertake curb appeal improvements.

» Tourism businesses and organizations make curb appeal improvements and lead community curb appeal efforts.

» More towns epitomizing the "vibrant and charming small towns" are highlighted in visitor information and marketing materials.

» Success stories are widely covered by Montana media.

Background & Rationale

The Montana Brand promises "vibrant and charming small towns". To better deliver on that promise, Montana should continue to improve the appeal of its small towns and expand the list of particularly charming towns that can be highlighted (see Strategic Action 2.1.) throughout the state. Delivering on this Brand promise will improve the visitor experience and visitor satisfaction, contributing to extended stays, return visits, and positive word-of-mouth.

Improving curb appeal also offers beneficial "peer effects". Improving the facades of one block often leads to improvements on the next block. Raising the appeal of one town encourages other communities to follow the example. This effect is strengthened by shining a spotlight on the efforts – by raising industry awareness of successful efforts that are undertaken and by rewarding the effort through promotion of the most charming small towns to visitors.

In addition, media coverage of successful curb appeal projects – big and small – throughout Montana not only offers positive publicity for the town, but also builds respect in general for tourism and the benefits that it brings. Particularly where the tourism community provides the leadership and support for curb appeal improvements, the projects will demonstrate that improvements designed to attract visitors are also an amenity for local residents and improve the local quality of life.

2.5. Support local and Montana products and businesses to build economically vibrant towns

This Strategic Action strengthens Montana's tourism product development and marketing efforts, and builds respect for the tourism industry in Montana.

Recommended Tactics

MTOT, TAC

- Ensure that visitor information identifies those businesses and organizations that offer local and Montana products.
- Collaborate with programs and organizations that offer and promote Montana made and grown products to leverage those efforts.
- Link to the Made In Montana website (www.madeinmontanausa.com) in visitor information to help visitors find retailers that carry Montana products and to encourage purchase of Montana products before, during, and after visiting the state.
- Continue to publicize the role of tourism in expanding the market for Montana made and grown products.

Regions, CVBs, Communities, Tribes

- Ensure that visitor information identifies those businesses and organizations that offer local and Montana products.
- At any special events, maximize the availability of products and services that are made or grown locally or in Montana (see Strategic Action 2.7.).
- Incorporate local producers, craftsmen, artists, and performers into the tourism offerings of the community/region.
- Link to the Made In Montana website (www.madeinmontanausa.com) in visitor information to help visitors find retailers that carry Montana products and to encourage purchase of Montana products before, during, and after visiting the state.
- Collaborate with programs and organizations that offer and promote Montana made and grown products to leverage those efforts.
- Continue to publicize the role of tourism in expanding the market for Montana made and grown products.

Businesses & Organizations

- Use and sell more local and Montana products.
- Publicize the use or sale of local and Montana products. Inform MTOT and the Region/CVB so that the information can be included on official tourism websites.

Indicators of Success

- Local and Montana products sold in more restaurants and shops.
- Visitors can easily locate restaurants and shops that offer Montana and local products in official tourism information.
- Local producers, craftsmen, artists, and performers are featured in visitor information, tourism offerings, and special events.
- Local and Montana producers and growers recognize the role of tourism in expanding their market.

Background & Rationale

Agriculture continues to be the largest sector in the Montana economy and is the economic mainstay for many of the smaller towns in the state. Integrating agricultural production and tourism offers benefits for both sectors. The partnership with agriculture builds support and respect for tourism in the community and contributes to a more holistic and cooperative approach to economic development in communities.

Food is not just a commodity for visitors; it is part of the visitor experience. Local food appeals to the visitor's desire for authenticity and enhances the visitor experience by connecting consumers to the region and its culture and heritage. It also appeals to the recent "slow food" and "locavore" movements.

Greater use of local and Montana products by tourism-related businesses creates a larger market for those products. Research on "slow travel" and on "soft growth" identifies benefits including: keeping a larger share of each tourism dollar in the community and distributing the benefits of tourism more broadly within the community.

Similarly, promoting and selling products produced locally or in Montana benefits both the producers and the tourism industry. It offers another element of authenticity for the visitor while increasing the local economic benefits of tourism for the arts and artists, artisan producers and craftsmen, small manufacturing, and the local economy.

Resources

The Made in Montana website – www.madeinmontanausa.com – offers retail and wholesale sellers of Montana products. The Montana Departments of Commerce and Agriculture, together with the Montana Arts Council, sponsor an annual Made in Montana Marketplace (http://www.madeinmontanausa.com/tradeshow.asp) that can be used to help source "Made in Montana", "Grown in Montana", and "Native Made in Montana" products. Additional programs of the Montana Department of Agriculture can be leveraged to promote more local sourcing by the tourism industry. For example, collaboration with the Farm-to-Table program and Restaurant Rewards program could help incentivize more local and Montana sourcing by businesses.

2.6. Develop and sustain special events that tie in with local tourism assets

This Strategic Action strengthens Montana's tourism product development.

Recommended Tactics

TAC, MTOT

» Support special events through the Special Event Grant Program (SEGP).

» Facilitate the sharing of success stories and lessons learned among communities, and foster mentoring and collaboration among event organizers.

Regions

» Support and promote the coordination of special events within and across regions, to avoid scheduling conflicts among events.

» Facilitate the sharing of success stories and lessons learned among event organizers.

CVBs, Communities, Tribes

» Develop special events that:

- tie in well with local and regional tourism assets and reinforce the visitor experience offered by the community and region;
- take place outside of peak season, to reduce seasonal fluctuation in visitor numbers, to reduce competition faced by the event, and to maximize the available local lodging capacity;
- have minimal requirements for additional infrastructure;
- are appropriate for their setting, i.e., natural environment/icons will be protected and respected; and
- appeal to an audience beyond the local population and can attract out-of-market visitors.

» Evaluate the capacity of the organization and the community to support the proposed event (e.g., infrastructure needs, available volunteer labor, lodging capacity). If nearby communities will benefit from spill-overs (providing extra capacity for lodging, eating, etc.), recruit contributions from those communities (volunteers, promotion, financial support, etc.).

» Build strong and broad community support and community participation by actively involving the business community, civic organizations, etc.

» Maximize the economic benefits to the community:

- when appropriate, promote visitor spending by locating the event in the downtown or other retail area and ensuring that shops will be open on the day(s) of the event;
- ensure that ample opportunities for visitor spending at the event are available (souvenir stands, food vendors, related crafts or art, etc.); and

- maximize the local content of spending opportunities for visitors (locally produced foods and souvenirs, available local lodging and dining, local paid performers, local paid staffing, etc.).

» Identify events of all types – regional and statewide – that could be complementary to the event and coordinate with the event(s) or attraction(s) to bolster mutual success.

» Adopt a recycling plan for the event to improve visitor and resident satisfaction; e.g., make recycling bins widely available at the event, encourage vendors to use recyclable containers, and have a stated goal of zero waste.

» Seek out other communities and event organizers that can offer insights and/or mentoring.

» Implement a survey (e.g., ITRR's "survey in a box") or other valid method to gauge event satisfaction and economic impact on the community (e.g. survey local businesses regarding changes in product turnover, additional staffing, increased receipts,).

» Share success stories and lessons learned.

Businesses & Organizations

» Support the success of the event, e.g. through extended hours, or event promotion.

» Help maximize the local economic benefits of the event, e.g. by ensuring adequate inventory and staffing, increasing local products/ingredients, or adjusting hours.

Indicators of Success

» Events tie in well with other local/regional tourism assets and complement other events in the region and state.

» Events maximize local content to minimize "leakage" of economic benefits.

» Events are self-sustaining and sustained over multiple years.

» Events have broad and sustained community support.

» The Special Event Grant Program helps establish, reinvigorate, or expand successful, self-sustaining events.

» Scheduling conflicts among events are minimized.

» Event surveys indicate visitor satisfaction, nonresident attendance, intent to return, or significant positive economic benefits for the community.

» Success stories and lessons learned are shared, building an important resource for event organizers.

Background & Rationale

Special events are a recognized means for building tourism. They can generate revenue for local businesses, extend the tourism season, draw new visitors to an area, promote community pride and physical improvement of the community, and help to promote tourism in the area more broadly (O'Sullivan & Jackson, 2010).

Research has found that special events held by the most successful rural tourism destinations consistently tie in with existing local tourism attractions and assets, e.g., fishing tournaments for communities that offer outdoor recreation opportunities for visitors and historical festivals for towns that have many historic sites (Wilson, Fesenmaier, Fesenmaier, & Van Es, 2001). In this way, special events complement and reinforce tourism in the community more broadly.

Events generally require several years to become established, making the Special Event Grant Program an important support mechanism.

Event tourism is highly labor intensive and, particularly in smaller communities, requires a great deal of *volunteer* work. Over time, sustaining the volunteer effort can become challenging, as noted by those involved in the highly successful Montana Folk Festival in Butte. Successful events can also overwhelm the capacity of the host community or face opposition from community members who feel overwhelmed by the influx of visitors (O'Sullivan & Jackson, 2010). Building a broad base of community support is, therefore, very important for the sustained success of an event.

Resources

ITRR offers a "Survey in a Box" service for the collection and analysis of *local* survey data. Examples of case studies that have conducted using this service can be found at http://www.itrr.umt.edu/reports_casestudies.html.

The online "events calculator" provided by the South Dakota Department of Tourism provides useful insights into what factors determine the economic impact of special events. It is available at http://www.sdvisit.com/tools/research/eventscalculator/index.asp

2.7. Expand tourism seasons through local coordination

This Strategic Action strengthens Montana's tourism product development and marketing efforts, and builds respect for the tourism industry in Montana.

Recommended Tactics

Regions, CVBs, Communities, Tribes

- Collaborate to identify clear seasonal boundaries based upon availability of local tourism assets and historical tourism flows.
- Collectively identify tourism assets and/or niche markets that could be strengthened or utilized more extensively to extend the existing season(s).
- Assess the feasibility, individually and collectively, of extending the opening of amenities to match extended tourism seasons.
- Coordinate seasonal opening and closing of amenities, matching the availability of tourism assets as closely as possible and ensuring that visitors will have access to all necessary amenities.
- Publicize local economic gains derived from the extended or consolidated season(s).

Businesses & Organizations

- Participate in local efforts to coordinate seasonal openings and closings.

Indicators of Success

- Businesses and organizations in a community have shared expectations regarding the start and end of tourism season(s), supporting reliable expectations that all necessary amenities will be available for their visitors.
- Income generating seasons are stretched to the fullest extent, within staffing and management constraints.

Background & Rationale

Tourism in Montana is, fundamentally, a seasonal industry. This seasonality poses many challenges for tourism-related businesses and organizations, particularly in regard to staffing and financial viability. The financial challenges of seasonality can be mitigated by extending the stronger season(s). Many stakeholders in community sessions indicated that the fall season (September-October) has grown in recent years or holds potential for growth. Some indicated that the spring season, though more challenging, offers some potential for niche market growth (e.g. wildlife viewing).

The full potential of peak and shoulder seasons is not realized in some cases due to the lack of coordination among the local providers of tourism products and services. Dates of opening and closing are not coordinated and in some cases are not predictable. By coordinating the availability of attractions and amenities, visitors could be assured of access to all the components of a good visitor experience. Visitors will not arrive at an open attraction to find no services in town or book lodging only to find that dining is not sufficiently available.

Better coordination provides predictability for businesses and organizations, allowing them to market to visitors with confidence that the complementary products and services will be available. It significantly reduces the risk of being unable to deliver a good visitor experience due to circumstances beyond their control. Similarly, it benefits the competitiveness of the destination by reducing poor visitor experiences and negative word-of-mouth.

A coordinated approach may also allow the destination as a whole to extend its season, consolidating the recognized potential of the spring and fall seasons.

Extending existing seasons to tap this potential, however, is often constrained by staffing difficulties, as seasonal staffing often draws upon a student population that cannot extend into the spring or fall. Other sources of staffing – such as international workers – pose their own difficulties, including additional administrative burdens for hiring or language difficulties. Managerial constraints also exist, in that some operators prefer a shorter season and will be unwilling to extend their operations. These structural problems must be considered when determining the feasible length of the operating season.

2.8. Address the short- to long-term effects of the Bakken oil boom for tourism

This Strategic Action strengthens Montana's tourism product development and marketing efforts.

Recommended Tactics

MTOT, Regions, CVBs Communities, Tribes, Businesses & Organizations

» Address the short term accommodations shortages by collaborating to establish a system to help non-resident visitors locate available lodging.

» Work collaboratively to ensure that tourism-related concerns are considered in the Montana Department of Transportation's (MDT) plans to address the impact of Bakken on transportation infrastructure. Work closely with MDT and ensure that tourism stakeholders are widely aware of MDT reports and information.

» Collaborate to tap the potential tourism markets that exist in the population attached to the Bakken development by (i) conducting research to understand several segments of that potential market; (ii) packaging local tourism assets into products tailored to these groups; and (iii) devising targeted marketing for promising segments in North Dakota.

» Where ever possible, highlight the continuing small town nature of affected towns. Promote eastern Montana towns as oases from the oil patch.

Regions, CVBs, Communities, Tribes, Businesses & Organizations

» Participate in local economic development and growth management discussions and planning to preserve and enhance the charm and vibrancy of affected towns. Offer well-coordinated proposals for building a diversified economic base including tourism, based upon solid research.

Indicators of Success

» Tourism entities collaborate to develop an immediate solution to the short-term accommodations shortage.

» Affected communities, businesses, and organizations are well informed regarding Bakken-related transportation impacts and the responses of MDT.

» Communities, businesses, and organizations tap the Bakken-related populations as a tourism market.

» Tourism entities participate actively and are a positive force in efforts to harness the economic boom to drive diversified economic development – including sustainable tourism – and to support charming and vibrant towns through the oil cycle.

Background, Rationale & Resources

Community sessions held throughout eastern Montana made clear the level of concern among tourism industry stakeholders regarding the impacts of the Bakken oilfield. Concerns centered upon:

» The current lack of availability of accommodations for visitors;

- A perception that visitors are avoiding northeastern Montana as a tourism corridor due to the impacts of the Bakken;
- Concern that a boom-and-bust cycle will leave affected towns neither vibrant nor charming in the medium- to long-term; and
- The increased truck traffic making travel more dangerous.

At the same time, stakeholders recognize the potential benefits that the tourism community could reap from the population growth and increase in business travel related to the Bakken oil patch.

Accommodations Shortage and Negative Perceptions

Stakeholders expressed concern that alternate travel routes will become established due to current accommodations shortages, making it very difficult to win travelers back in the future. This raises a long term concern that local economies will become less diversified as tourism and other industries are squeezed out by oil development, leading to economic devastation when the oil cycle goes "bust".

Reducing uncertainty regarding accommodations will reduce the level of "risk" perceived by travelers and help counter perceptions that the region should be avoided by visitors. Using online or phone-based resources, travelers should be able to locate lodgings 24/7/365 to prevent situations where visitors feel "stranded". MTOT's travel counselors, online booking sites, and other existing resources could be examined for their potential to serve this need. Alternatively, eastern Montana hoteliers themselves might develop a simple system for referring travelers to one another when they have no vacancies. Such a system should be publicized in the state-wide tourism sector and in visitor information to maximize the risk-reduction effect it offers. MTOT and Region websites may also wish to highlight lodging facilities that cater specifically or exclusively to travelers (as opposed to residents).

Addressing the situation directly and with a positive perspective – e.g., "Eastern Montana's economy is booming!...But we'll make sure you don't get lost in the bustle." – will likewise reduce perceived risk and negative perceptions that may exist. Highlighting the number of new lodgings being built will underscore the short-term nature of the problem.

Negative perceptions of communities close to the Bakken can be countered with tourism marketing and promotion that emphasizes the continued small town culture and presents the established communities of eastern Montana as oases from the oil patch in North Dakota.

Transportation Issues

Regions, CVBs, and communities should make themselves aware of relevant MDT information and resources. MDT has contracted a study of the transportation impact of the Bakken development, which is in progress (see http://www.mdt.mt.gov/research/projects/pave/oil.shtml). MDT has also developed "Montana Transportation and Land Use Resources for Growing Communities", an online toolkit to help with transportation planning (see http://www.mdt.mt.gov/research/toolkit/default.shtml).

Potential Tourism Markets

The population increases associated with the Bakken development offer a number of potential tourism markets, such as:

- business travelers who might wish to include leisure and recreation activities in their trip, or business hosts who might wish to entertain their business guests by engaging them in local tourism activities;
- workers who wish to fill time off (often long stretches, as workers frequently work 15 days on and 15 off, for example);
- workers who wish to recreate with their visiting family members; and
- workers' (resident) families who wish to enjoy tourism or recreation activities.

Understanding the potential tourism market and developing suitable tourism products and targeted marketing could help communities to reap short- and long-term benefits from the oil development. Product development can be as simple as developing suggested itineraries for weekend (or longer) trips or developing and promoting packages of accommodations and attractions for Bakken personnel.

Balanced Economic Development

Eastern Montana stakeholders have expressed concerns about what is known as a "resource curse" – a boom in natural resource extraction causes other economic sectors to be neglected, slowing economic growth and development. Research has found that the best means for mitigating the boom-bust cycle of oil extraction and avoiding the "resource curse" include (i) using tax revenues from the resource boom to support a diversified economic base, (ii) ensuring a broad distribution of benefits through public policy, and (iii) coordinating local and regional efforts to manage and moderate boom and bust changes.

The Bakken field is currently in its "development" stage. When the field reaches its "production" stage in 15-20 years, employment is expected to decrease by 90% (Seifert, c.2011), although the "fracking" process may generate some additional continuing employment. A large drop in employment would be expected to cause economic contraction, making development of a diversified economic base over the next two decades an important buffer against the boom-and-bust cycle.

The tourism stakeholders can contribute to building a diversified local economy by exploiting current opportunities, participating actively in local economic planning, and building support (respect) for tourism as a viable and desirable contributor to the local economy. Tourism stakeholders should advocate for policies that ensure development of a balanced economic base, using sound research to support their concerns and proposals.

As community members, tourism stakeholders should inform themselves of the economic cycle of oil production and the economic risks involved in natural resource windfalls. Useful resources include:

- "Community Responses to Energy Development", the Fall 2012 issue of the *Montana Policy Review,* published by the Local Government Center of the Montana State University Extension, available at http://www.msulocalgov.org/publications/MTPolicyReview-Fall2012-WEB.pdf;
- "Benefitting from Unconventional Oil: State Fiscal Policy is Unprepared for the Heightened

Community Impacts of Unconventional Oil Plays", a research paper published by Headwaters Economics (of Bozeman) and Stanford University, and available online at http://www.ag.ndsu.edu/ccv/documents/benefiting-from-unconventional-oil;

» "A Basic Analysis of the Bakken Oil Boom: Precautions and Planning", written by Laura Siefert of the University of Minnesota, and available at http://www.ndoil.org/image/cache/Bakken_Precautions_and_Planning_-_Seifert.pdf; and

» North Dakota State University's Center for Community Vitality. Its "Oil and Gas Resources" website, at http://www.ag.ndsu.edu/ccv/oil-and-gas-resources, offers materials for communities seeking to manage growth, benefits, and problems related to the oil boom in North Dakota, much of which is applicable to Montana towns.

3.1. Present each town in the context of its surroundings

This Strategic Action strengthens Montana's tourism product development and marketing efforts.

Recommended Tactics

MTOT, Regions –

» Clearly show the geographic location of each town in visitor information to help orient the visitor.

» Clearly show each town within a meaningful context of nearby towns, transportation, public lands, and icons of "spectacular, unspoiled nature" in visitor information to facilitate the planning of multi-destination trips.

CVBs, Communities, Tribes, Businesses & Organizations –

» Ensure that local visitor information clearly identifies the location of the community in Montana to help orient the visitor.

» Ensure that local visitor information clearly identifies the nearby towns to facilitate the planning of multi-destination trips that include more time in your area.

» Ensure that local visitor information clearly identifies all nearby public lands and offers information (directly or through links) regarding access points and the attractions, assets, and activities available there. This facilitates planning of a full itinerary and promotes a longer stay.

» Ensure that local frontline staff can offer information and knowledge regarding experiences available in the surrounding area. This promotes the use of your community as a gateway and encourages a longer stay.

» In local visitor information, add local insights and recommendations to the public lands inventories: e.g., favorite hikes or places to float, picnic, or watch the sunset; where to see wildlife or wild flowers; or local news articles highlighting favorite places.

Indicators of Success

» In all visitor information each town is easily placed on a map, and in the context of surrounding towns, icons, public land access points, transportation and other visitor points of interest.

» Visitor information includes local insights regarding access and activities on nearby public lands.

Background & Rationale

Making the relative locations of towns, activities, and outdoor spaces easy to see is key to helping the visitor with *orientation* and with building an itinerary.

The Montana Brand promises relaxing hospitality to go along with the visitor's exhilarating experiences. The visitor needs the relative location of towns, activities, and outdoor locations in order to plan an itinerary that combines both aspects of the promised experience.

This integration of comfort and experiences so that visitors can include both in their itinerary also provides reassurance that any necessary services or amenities are available and that the natural wonders are easily accessible. The overall effect is to reduce the perceived riskiness of Montana as a destination, encouraging selection of the state and facilitating trip planning.

Presenting the town within the context of its surroundings greatly enhances the visitor's perception of an integrated and balanced whole and helps the visitor to start visualizing their own trip.

By providing local insights and recommendations regarding access and activities on nearby public lands, the authenticity of the Brand is reinforced and the visitor begins to form a connection to the gateway town.

3.2. Present a balanced and cohesive visitor experience in all marketing and visitor information

This Strategic Action strengthens Montana's tourism marketing efforts.

Recommended Tactics

MTOT

» Ensure that marketing materials and visitor information present – in images and text – a visitor experience that consistently marries "breathtaking experiences" and "relaxing hospitality".

Regions, CVBs, Communities, Tribes

» Ensure that marketing materials and visitor information present – in images and text – a visitor experience that consistently marries "breathtaking experiences" and "relaxing hospitality".

» Focus first on presenting the best of what a destination offers and what makes the destination stand out from others. The most "breathtaking experiences" might be outdoor recreation or wildlife viewing, historical reenactments, cultural festivals, or live theatre. The hospitality that makes the destination stand out may be fine dining, a campfire cookout, or a warm pastry and a steaming cup of coffee in a cozy café.

» Add depth by presenting a second tier of images that capture the diversity of experiences and hospitality available. If outdoor activities are the strong point, for example, present images to indicate that there are also heritage sites, cultural activities, or local arts festivals, as appropriate.

Businesses & Organizations

» Provide customers with recommendations for local goods, services, or experiences that complement the goods or services you sell (e.g., places to dine after the guided fishing trip, where to take a horseback or bike ride to work up an appetite for the steak dinner, where to stop for coffee before hitting the ski slopes, arts and cultural offerings to balance great day hikes).

» Work together to cross market goods, services, attractions, and businesses in your community or area.

Indicators of Success

» Images and text present a balance of experiences and hospitality.

» Images and text present the diversity of experiences (not just natural or outdoor experiences, but also experiences related to culture, heritage, and the arts) and hospitality (from fine dining to small town comfort).

» Images and text for specific communities and regions focus on the experiences and hospitality that make that destination stand out from others – the best or most unique of what they offer.

» Businesses and organizations recommend experiences and hospitality to complement their own product or service in visitor information and via knowledgeable frontline staff.

Background & Rationale

The synergy of Montana's spectacular nature and relaxing hospitality is central to the visitor experience promised by the Montana Brand. By clearly projecting this balanced visitor experience, Montana's visitor information can make the potential visitor aware of this special chemistry, increasing the appeal of Montana as a destination.

Montana's brand research has shown that visitors are attracted by the adventurous aspects of travel in Montana, yet this can be outweighed by the perception of remoteness and the perceived lack of "comfort", which can make Montana seem like a risky destination choice. By presenting a cohesive image of experiences and hospitality, visitors will be reassured that both are readily available to create a balanced visitor experience throughout Montana. Offering options for fine dining, fine arts, or cultural events highlight the element of refinement that can soften the perceived "rough edge" of the Montana experience.

3.3. Present a seamless and border-less visitor experience in all visitor information

This Strategic Action strengthens Montana's tourism product development and marketing efforts.

Recommended Tactics

TAC, MTOT

» Examine the rules and regulations governing Regions and CVBs. Make modifications as necessary and appropriate to facilitate closer coordination.

» Actively support cross-region cooperative efforts by the tourism community to facilitate itineraries along natural travel paths.

MTOT, Regions, CVBs, Communities, Tribes

» Evaluate visitor information and trip planning tools for seamlessness from the visitor's perspective, particularly between adjoining Regions and along primary travel corridors.

» Within visitor information, ensure that each town is placed in the context of nearby towns, attractions, activities, and transportation (see Strategic Action 3.1), including those across Regional boundaries.

» Ensure that information for each town always incorporates holistically those assets and amenities that lie outside the city limits, for example dining, accommodations, activities, or services.

Indicators of Success

» Visitor information is seamless and has user-friendly functionality across Regions for trip planning.

» Regions and CVBs undertake effective cooperative efforts across Regional boundaries.

» Visitor information for towns is inclusive of outlying tourism assets.

Background & Rationale

Providing visitor information in a seamless and cohesive way is particularly challenging because the visitor experience is a composite product that often crosses city, county, and regional boundaries. Meeting visitor information needs without creating artificial barriers in the mind of the visitor is essential for converting potential visitors and facilitating trip planning.

In addition, research has shown that tourism websites that are enjoyable predispose the visitor to a positive perception of the destination itself and build expectations of a positive travel experience, while websites that cause frustration predispose visitors to negative perceptions of the destination and the visitor experience. Visitor information sites, therefore, must not only make comprehensive information available, but must do so in a user friendly way.

The administrative boundaries of city limits or tourism Regions are irrelevant to the non-resident visitor. To the extent that the traveler cannot obtain visitor information or plan an itinerary across these boundaries, the attractiveness of Montana as a destination (and its competitiveness) will be reduced.

From the perspective of a Region, CVB, or Chamber of Commerce, however, the administrative boundaries create very real and tangible constraints through rules, regulations, and budgetary constraints. A strong commitment to reducing the negative effects of these boundaries for the visitor must be accompanied by (i) realistic expectations and (ii) a strong commitment to aligning administrative processes to support (or not impede) that goal.

3.4. Build excitement about Montana among niche market enthusiasts

This Strategic Action strengthens Montana's tourism product development and marketing efforts.

Recommended Tactics

MTOT, Regions, CVBs, Communities, Tribes

- Craft visitor information that immediately sells the excitement of experiencing an activity or interest *in Montana*.
- Ensure that locations within Montana for a particular activity/interest are easily located on a map, including their relative location to one another.
- Ensure that for each location for a particular activity or interest the surrounding towns are easily identified. Present surrounding towns as gateways to that activity or interest, offering supplies and support needed for the activity or interest, and offering comfort and hospitality to complement the breathtaking experience.
- Provide links to user generated content online (e.g., blogs, online communities, reviews) to capture the passion for pursuing the activity or interest in Montana.
- When presenting niche information, also offer area activities and attractions that would appeal to a spouse, family members, or other travel partners that are not as passionate about the niche activity. For example, when promoting fly fishing or hunting, suggest activities that could entice the target niche visitor to bring along a spouse, family, or friends.

Businesses & Organizations

- If customers often share a common trip motivation (e.g. fishing, snowmobiling) provide links to user generated content online (e.g., blogs, online communities, reviews) to capture the passion for pursuing the activity or interest in the area.
- If your business or organization doesn't serve all the needs of the niche market, provide information about other local entities that can offer supplies, support for activities or interests and offer comfort and hospitality.
- When presenting niche information, also suggest activities and attractions that would appeal to a spouse, family members, or other travel partners that are not as passionate about the niche activity. For example, when promoting fly fishing or hunting, suggest cultural, heritage, or recreational activities that could entice the target niche visitor to bring along a spouse.

Indicators of Success

- For visitors interested in a particular activity or interest, visitor information offers easy access to multiple locations to partake in that activity or interest. These locations are easily located on the map, located in relation to one another, and located in relation to gateway towns.
- Visitor information presents each activity or interest in a way that immediately sets a tone of excitement, focusing on the superb setting offered by Montana.

» Links to independent online content helps to build excitement and lend credibility to the Brand promise.

Background & Rationale

Niche activities are strong motivators for their audiences and, while these audiences may be individually small, they can contribute significantly to overall tourism numbers. (For example, Wyoming's Office of Tourism found that niche activities together *motivated* the choice of Wyoming for 47% of the state's 2012 visitors, compared to 46% of visitors motivated by visiting a national park. See http://www.wyomingofficeoftourism.gov/industry/pdf/homepage/2012VisitorProfileStudy.pdf).

Because Montana's strength as a destination depends upon the natural landscape and outdoor activities (adventurous or not), targeting the niche markets associated with these activities offers strong opportunities for Montana's tourism sector.

Today's traveler seeks experiences rather than "sights" and judges a destination on the "existential or authentic experience" – the deep and lasting impression that it makes upon them and their lives. Offering the enthusiast a superb experience involving the favored activity or interest will have a strong marketing pull.

Like scenic beauty, however, many other states have the same activities and interests available. Montana must position itself, therefore, by emphasizing *excitement* rather than just *availability*.

Mapping the various locations for an activity or interest in relation to one another and to gateway towns facilitates multi-destination trip planning and mitigates any concerns about the availability of necessary services and amenities. The visitor can envision and plan a balanced trip with breathtaking experiences and relaxing hospitality. It "expands opportunities for these visitors to stay longer and spend more" (Advisory Council on Historic Preservation, 2009).

Linking to user generated content online – blogs, online communities, reviews – strengthens the credibility of the breathtaking experiences that are offered, supports trip planning, and builds excitement. The excitement generated can be significant, as online community members often express great passion not only for the activity but also the Montana setting. For example, motorcyclists on AdvRider.com rave about riding in the Gravelly Range and the BigSkyFishing.com blog exudes excitement about favorite fishing spots all around Montana. These word-of-mouth praises are incredibly valuable and can be found for most activities marketed to the non-resident visitor.

3.5. Build and expand photo and video libraries

This Strategic Action strengthens Montana's tourism marketing efforts.

Recommended Tactics

MTOT, Regions, CVBs, Communities, Tribes, Businesses & Organizations

- Build, expand, and update an inventory of photo images and videos for use in the promotional campaigns, collateral and other promotion efforts.
- Ensure that images and video materials project and reinforce the Montana Brand.
- Ensure that images and video materials feature iconic locations, as appropriate.
- Ensure that images and video materials include all seasons that the stakeholder wishes to promote.
- Ensure that images and video materials are largely experiential.

Indicators of Success

- Each region, CVB, Community, tribe, business and organization has a library of images that represents their tourism area in a way that is brand consistent.
- Images and video materials are kept current.
- Images and video materials include relevant icons and seasons, and show visitor experiences.

Background & Rationale

Appealing, experiential, and brand consistent images for use in marketing and promotion are key to inspiring potential visitors. Given the diversity of Montana's tourism offerings, it is important that each stakeholder build and maintain a library of images and videos that features its area.

4.1. Conduct ongoing research and analysis of evolving best practices for delivering visitor information

This Strategic Action strengthens Montana's tourism marketing efforts.

Recommended Tactics

TAC, ITRR, MTOT

- Track changes in what sources of information are used by visitors in destination selection and trip planning, including emerging technologies. Draw upon ITRR's nonresident survey data, web analytics, academic research, and reporting in non-academic trade press.
- Track changes in how those sources are used by visitors. Draw upon ITRR's nonresident survey data, web analytics, academic research, and reporting in non-academic trade press.
- Track emerging best practices among DMOs for delivering visitor information. Draw upon academic research and reporting in non-academic trade press. Examine practices adopted by industry leaders, and those used by destinations similar to Montana, assessing effectiveness and cost.
- Evaluate and benchmark current delivery of visitor information against emerging best practices (e.g., cost-effectiveness, ability to meet Montana's strategic goals, and viability of best practices in the context of Montana's resource and infrastructure constraints).
- Make resulting information, insights, and guidance available to stakeholders.
- Modify the Montana Tourism and Recreation Strategic Plan as needed to reflect evolving visitor information needs and best practices.

Regions, CVBs, Communities, Tribes, Businesses & Organizations

- Keep abreast of evolving visitor information needs and DMO best practices as reported by MTOT, TAC, and ITRR.
- Carry out web analytics and other analysis to help guide your visitor information distribution practices.
- Share useful information and resources with MTOT and the TAC.

Indicators of Success

- MTOT, ITRR, and the TAC effectively disseminate insights from research and analysis that are easily understood and applied by stakeholders.
- Montana tourism stakeholders understand the emerging visitor practices for obtaining information and planning trips.
- Montana tourism stakeholders make decisions about the provision of visitor information based upon valid academic and market/trade research and analysis.

» Montana tourism stakeholders adopt a system of providing visitor information that is effective and uses resources optimally.

» Montana tourism stakeholders are confident in their adoption and use of emerging technologies.

» The Montana Tourism and Recreation Strategic Plan is updated and modified as needed to reflect evolving visitor information needs and best practices.

Background & Rationale

New information and communications technologies have changed how travelers obtain information, what information they want, and how they use that information. Because patterns of use are still evolving, meeting the information needs of visitors has become particularly challenging. The challenge involves not only the effectiveness of marketing and promotion, but also the cost. During this transition period, multiple new technologies are *supplementing*, not replacing, traditional information sources; adopting new technologies often involves a high cost in capital and labor; and the effectiveness and longevity of emerging technologies is uncertain. In the current environment, Montana's tourism stakeholders can neither afford to ignore new technologies; nor afford to invest heavily in technologies whose benefits are not fully proven. They must also not adopt technologies haphazardly. Each information source must have a specific role that it can fulfill effectively; and all sources must work as an integrated system.

Strategies and decisions regarding the provision of visitor information *must* be guided by sound research and analysis. An effective and viable visitor information system requires a commitment to evaluating and re-evaluating the best way to meet the evolving visitor needs and preferences. Thankfully, because this is a central issue for the global tourism industry, it is the subject of much research and analysis (both academic and trade research). The Montana tourism community can cost-effectively gain an understanding of the trends by monitoring published findings from peer-reviewed academic research and from open-source trade and market research. Reviewing this literature and extracting relevant insights can provide much of the guidance needed by Montana's stakeholders. Where insight is needed that is in some way particular to Montana, ITRR may be able to provide answers based upon existing non-resident survey data. ITRR and private research firms can also be engaged to undertake specific research on a key topic (e.g. conversion rates).

Effective distribution of insights from this research is critical to helping Montana's tourism stakeholders understand and respond effectively to the changing dynamics of providing visitor information (see Strategic Action 5.3).

4.2. Design online and mobile communication tools to meet the evolving needs of visitors

This Strategic Action strengthens Montana's tourism marketing efforts.

Recommended Tactics

MTOT, Regions, CVBs

- Ensure that websites and mobile resources effectively meet the information needs of visitors, as identified by research and analysis (see Strategic Action 4.1.).
- Ensure that websites are optimized for mobile access to the extent that is (i) justified by research and web analytics and (ii) feasible within resource and infrastructure constraints.
- Ensure that MTOT, Region, and CVB sites and content are seamlessly integrated to lead the visitor through inspiration, orientation, and facilitation. Individual online and mobile components should work together to form an effective system for providing visitor information throughout the travel planning process.
- Convey the Montana Brand pillars clearly and consistently to inspire the visitor.
- Present content that is experiential and engaging to inspire the visitor.
- Include good, functional maps to help the visitor with orientation and trip planning.
- Include traveler tips or itinerary ideas to help the visitor with orientation and facilitation, and to encourage longer trips and more destinations.
- Ensure that, together, the MTOT, regions, and CVBs sites and content contain *comprehensive* information on attractions, activities, amenities, and services. This helps the visitor with facilitation, makes the official Montana tourism sites a valuable trip-planning tool, and will encourage longer trips and more stops.
- Make the comprehensive information digestible and manageable by *highlighting* top attractions or amenities (e.g. Top 5 lists). This will help the visitor with trip planning (facilitation) and also reinforces inspiration.
- Integrate user-generated content (e.g. ratings and reviews, online community discussions, travel blogs), as appropriate, to strengthen credibility, inspiration, and trip-planning value for the visitor.
- Integrate social media channels, as appropriate, to offer greater interaction capabilities desired by a growing number of travelers.
- Provide greater transaction capabilities (e.g. booking, ticketing), when justified by research and analysis (see Strategic Action 4.1) and feasible.
- Evaluate online/mobile presence from the visitor's perspective for usability, functionality, content value, and appeal.
- Incorporate new technologies and applications (e.g., apps, interactive capabilities, transaction

capabilities) where supported by research and analysis (see Strategic Action 4.1). Identify an explicit role that each can fulfill successfully and incorporate it holistically into the visitor information system.

» Encourage and guide stakeholders to meet evolving visitor information needs, as identified through research and analysis (see Strategic Action 4.1.).

» Provide financial and technical assistance to help stakeholders meet evolving visitor information needs, within the guidelines of MTOT's grants and assistance programs.

Communities, Tribes, Businesses & Organizations

» Provide MTOT, Regions, and CVBs with the comprehensive visitor information they need to make their websites an effective online presence for your community/tribe.

» Link websites clearly to the MTOT, Region, and CVB websites.

» If the community/tribe website will also serve as a significant source of visitor information, ensure that:

- development and resource allocation are guided by web analytics, research and analysis (see Strategic Action 4.1);
- visitor information always includes those assets and amenities that are relevant to visitors but lie outside the city limits; and
- the website meets the basic needs of visitors, for example: provide a map of the town; do not bury visitor information in the website; feature visitor-appropriate content such as the top five things to see and do; and include inspiring images of the community and its surroundings.

» Where possible, link to electronic word-of-mouth to improve the usefulness of, credibility of, and visitor satisfaction with the official tourism websites.

» Optimize websites for mobile access to the extent that is (i) justified by research and web analytics and (ii) feasible within resource and infrastructure constraints (see Strategic Action 4.7.).

» Incorporate newly emerging methods of delivering visitor information that are supported by research and analysis (see Strategic Action 4.1) and viable within resource constraints.

Businesses & Organizations

» Ensure that the business/organization website contains accurate and complete information and that such information is provided (and updated) as appropriate to MTOT, Regions, and CVBs.

» Integrate ratings and reviews and social media into the website, where appropriate and beneficial.

» Link directly to online communities and discussions where the business, attraction, community or area receives positive word-of-mouth (see also Strategic Action 5.6).

- Where supported by research, analysis, and analytics (see Strategic Action 4.1.), optimize the website for mobile access so that visitors can access the most important information and carry out the most important tasks (e.g. find hours of operation, view a menu, book a room).
- Provide or link to online transaction capabilities (booking or ticketing) to facilitate visitation, if appropriate and feasible.
- Incorporate newly emerging methods of delivering visitor information that are supported by research and analysis (see Strategic Action 4.1) and viable within resource constraints.

Indicators of Success

- Development of online and mobile communications tools is guided by research and analysis (see Strategic Action 4.1.).
- MTOT, Region, and CVB websites are functionally integrated to meet visitor needs and to provide a system for visitor inspiration, orientation, and facilitation.
- Online and mobile technologies are selected and applied to form an effective system.
- Comprehensive content needed for trip planning (attractions, amenities, events, services, reviews, mapping, etc.) is integrated by MTOT, the Regions and CVB's.
- Online/mobile information is presented in a way that is experiential, engaging, and easily digestible.
- A cohesive and consistent presentation of the Montana Brand is found throughout the online/mobile content.
- Ratings and reviews and other user-generated content are incorporated effectively.
- The need for interaction and transaction capabilities has been addressed, as appropriate.
- Stakeholders are familiar with the electronic resources available through MTOT, Region, and CVBs and have the fundamental skills to make use of them.

Background & Rationale

Travelers deliberately make plans that are not highly structured and specific, so that they can enjoy experiences that present themselves during the trip. However, they also spend a considerable time thinking about and planning possible activities, both before they visit and during the visit itself. In fact, information search is a significant part of the purchase decision, and online information is the dominant source of visitor information. Official tourism websites are therefore an important touch point and can contribute significantly to destination competitiveness through "inbound marketing" by providing information that is ample, useful, and appealing.

Inbound marketing rests upon providing exceptional content that attracts and converts prospects to customers (visitors). It is "pull" marketing, as opposed to traditional "push" marketing, and is increasingly recognized for its effective (and cost-effective) use of Web 2.0. Good tourism websites will draw in and inspire potential visitors, allowing them to begin imagining and planning a trip. The inbound marketing complements traditional outbound marketing campaigns. The outbound campaigns put Montana top of mind and inspire thoughts of travel to Montana. The inbound marketing converts those potential visitors by making it easy and enjoyable for them to take the next step in trip planning.

A significant competitive weakness identified through Montana's branding research is the perception of the state as a "risky" destination. This isn't a concern about danger; rather risk refers to the perceived remoteness and a possible lack of amenities that increase the "risk" that one's trip won't be enjoyable. Reassuring visitors that amenities and services are available and of known quality by providing comprehensive visitor information can reduce the perceived "risk". The more information they find, the less risky Montana appears, and the better the customer needs can be met and served.
Research shows that an online presence must:

- clearly convey the Montana Brand to build deliverable expectations;
- provide sufficient relevant information for trip planning decisions to help the visitor find what he or she is seeking from the trip;
- make the large amount of content manageable and customizable, by highlighting or ranking items (e.g., "top 5" lists);
- include maps to provide orientation and context and help visitors plan an itinerary that is feasible;
- offer itinerary ideas to serve as a boiler plate and make trip planning easier;
- allow visitors to save items to a "backpack" or "bucket list" so that they can build an itinerary organically over time; and
- be not just easy, but *enjoyable* for the visitor to use.

A good online presence – functional and enjoyable to use – improves the visitor experience, promoting return visits and positive word-of-mouth.

Following the lead of other industries, tourism websites may need to evolve from static provision of information to integrating elements of communication, interaction (relationship building), and electronic transactions. While tourism has lagged behind in this regard, some state and local DMOs are now beginning to adopt these functionalities, making them a potential competitive factor in the near future.

4.3. Stay current with social media tools for effective interaction and relationship building with visitors

This Strategic Action strengthens Montana's tourism marketing efforts.

Recommended Tactics

MTOT, Regions, CVBs

» Ensure that social media tools are designed optimally for the evolving role they play in attracting and supporting visitors, as identified by research and analysis (see Strategic Action 4.1.).

» Examine and monitor the audience reached by Montana through each of its social media outlets to tailor the message optimally for that market segment.

» Incorporate additional social media outlets and relationship-building functions (e.g., deals and discounts, contests, or cross-selling), where supported by research and analysis and where feasible.

» Integrate social media with the online and mobile presence.

» Provide guidance for communities, tribes, businesses and organizations to help inform their decisions regarding a social media presence.

Communities, Tribes, Businesses & Organizations

» Critically evaluate the value of a social media presence and the potential for useful interaction and relationship building with visitors. Include analytics, research and analysis in the evaluation (see Strategic Action 4.1).

» Ensure that you have a high quality product or service before you enter the social media arena. Lay the groundwork for positive electronic word-of-mouth by being committed to customer satisfaction or avoid opening the door to negative electronic word-of-mouth.

» Interact with visitors through existing outlets, for example:

- monitor and respond to reviews (positive and negative) on ratings and review sites (e.g. TripAdvisor, Yelp);
- embed widgets for ratings and review sites on your website to encourage reviews from customers;
- embed widgets for social media outlets (e.g., Facebook, Twitter) on your website to encourage word-of-mouth about your product or service; or
- submit content for consideration on the Facebook page and other social media channels managed by MTOT, Regions, and CVBs.

» Participate in any online communities that are relevant to key niche markets for your product or service (see Strategic Action 5.6).

» Draw upon MTOT, Regions, CVBs, and ITRR guidance to inform decisions regarding a social media presence.

Indicators of Success

- The characteristics and market segments of Montana's audience on each social media outlet are known.
- Each social media outlet has an appropriate and clearly delineated role to play in non-resident tourism promotion and marketing and is evaluated against these goals.
- Tools are made available to facilitate visitor sharing of their experience (e.g. travel blogs, photos).
- Relationship-building activities that are implemented produce identifiable promotional benefits.
- Businesses and organizations take a measured approach to using social media, supporting their customers with a sustainable level of effort.
- Montana tourism stakeholders value and actively use MTOT guidance.

Background & Rationale

Publicly available research on the use of social media (e.g., Facebook and Twitter) for tourism promotion is very limited, the marketing value of these tools for DMOs is as yet unclear, and industry best practices are just beginning to emerge.

The key activity for this strategy is critical evaluation of social media efforts to ensure that they contribute meaningfully to the marketing and promotional efforts of the Montana tourism industry. Critical analysis is needed in order to tailor content, combine social media with other sources of visitor information to form an effective system, and allocate resources optimally. MTOT, Regions, and CVBs need insights into the audience each social media outlet is reaching (e.g., the MTOT Facebook audience appears to be primarily former and current Montana residents), how each is influencing travel decisions (e.g., broader studies of Facebook have found that it is a poor tool for direct sales but can be a powerful tool for amplifying a brand), and how strongly they are influencing those decisions.

Insights from rigorous academic research should guide social media plans. Following trends in the industry/trade press and benchmarking against other DMOs that are recognized for their social media activities can be useful. However, these sources of information must be viewed critically given the fact that social media is constantly evolving and a booming industry has emerged to sell related services.

For businesses and organizations, particularly those that are small, stepping into social media can seem daunting. Without a measured approach and a clear social media strategy, social media can consume an inordinate amount of time. Establishing then neglecting a social media presence can backfire, hurting the business image more than not being on social media in the first place.

Monitoring ratings and review sites (e.g. TripAdvisor, Yelp) is essential for hotels and restaurants, in particular, as many potential customers will check reviews. A number of tools can assist with monitoring the online reputation of a business or organization. Current examples include email alerts from TripAdvisor.com, Google.com, and SocialMention.com.

The use of existing social media outlets (e.g., the Montana Facebook page – www.facebook.com/visitmontana) is one effective way of supporting visitors without investing excessive time and resources. A social media strategy to plan and manage social media activity is essential to ensure that engagement delivers benefits. The Australian Tourism Data Warehouse offers a tutorial (#40) on "Social Media for Tourism" at http://www.atdw.com.au/tourismekit.aspx.

While social media is a marketing tool that is growing in importance, it is a double-edged sword. With a good product or service and high customer satisfaction, social media can amplify positive word of mouth with great effect. If, however, the product or service does not meet the standards or expectations of customers, the negative word-of-mouth will also be amplified and will be very difficult to contain. The first step in establishing a social media presence, therefore, must be ensuring the quality of the product or service.

Resources

Social media is one topic covered in several useful tutorials provided by the Australian Tourism Data Warehouse at http://www.atdw.com.au/tourismekit.aspx.
Many good tutorials can be found online. For example, search "Small Business Social Media Strategy" at www.slideshare.net for presentations given by social media professionals.

In tourism specifically, a number of commercial organizations track and evaluate the analytics of tourism promotion through social media. One example is the ongoing evaluation of state DMOs' social media presence by Gammet Interactive, LLC, available online at http://thinksocialmedia.com/category/dave-serino/

The Mercury Awards given by the U.S. Travel Association and listed at http://www.ustravel.org/member-services/award-programs/mercury-awards offer insights into social media design practices that are viewed by the tourism industry as exceptional. Bear in mind that such awards are rarely based on a rigorous methodology and may have little to do with *effectiveness*.

4.4. Provide printed materials that are useful to the visitor and cost effective for the marketing organization

This Strategic Action strengthens Montana's tourism marketing efforts.

Recommended Tactics

MTOT, Regions, CVBs

» Make decisions regarding the production of printed promotional materials based upon current research regarding the role printed matter plays in inspiring and facilitating visitors.

» Ensure that all printed materials clearly and consistently convey all three brand pillars in images and text.

Indicators of Success

» Printed materials are designed specifically for the way in which visitors are expected to use them in choosing a destination or planning a trip. Expectations are based upon current research.

» Printed materials clearly reflect the brand pillars and effectively present the experience offered by Montana. Printed materials, marketing campaigns, and online visitor information present a consistent destination brand, and thereby reinforce one another for greater effect.

Background & Rationale

While the internet has become the key source of visitor inspiration and information, most travelers continue to use a variety of information sources before and during travel, including print materials. As rapid technological change continues, however, the precise role played by each in the visitor's information gathering and decision-making process has yet to emerge.

Because online and offline information sources are used in combination, consistent presentation of the brand across all information sources is vital to the strength of the Montana Brand and to the promise of a deliverable visitor experience.

The fact that online information has supplemented but *not* replaced printed materials poses a significant budgetary challenge to DMOs. Resources cannot be simply reallocated to the production of online visitor information – they must be used to produce *both* online and print information pieces. At the same time, uncertainty as to the role that each information source plays – and will play in the future – makes this allocation even more challenging.

Monitoring the emerging research on visitors' use of information sources will support strategic allocation of resources going forward. Research on Montana's own visitors and analytics from Montana's tourism sites can also help to shed light on the use of information sources.

4.5. Offer itinerary ideas and traveler tips to help visitors structure their plans

This Strategic Action strengthens Montana's tourism product and marketing efforts.

Recommended Tactics

MTOT, Regions, CVBs, Communities, Tribes

- Develop itinerary ideas and traveler tips based on trip motivators, visitor interests, geographic proximity, or other aspects of visitor travel patterns. Draw upon research, data, analytics, and customer interaction to identify relevant travel patterns and to ensure that the suggestions are of interest and value to visitors.
- Integrate www.getlostmt.com suggested getaways into www.visitmt.com and Regions/CVBs sites.
- Incorporate any itinerary ideas and traveler tips generated through MTOT-led events such as community tourism workshops.
- In itinerary ideas with a "theme", ensure that the visitor can also identify essential amenities (e.g., food and lodging) and complementary activities and attractions for a balance of "breathtaking experiences" and "relaxing hospitality".
- Use web analytics to test the relative interest of itinerary ideas and traveler tips to visitors.
- Provide electronic word-of-mouth mechanisms for visitors to provide feedback and recommendations building upon the itinerary ideas.

Indicators of Success

- Selection of suggested itineraries to include in visitor information is justified by research and data.
- Web analytics indicate that visitors are accessing suggested itineraries.
- Visitor feedback (survey or anecdotal) indicates value of suggested itineraries.

Background & Rationale

Research shows that while visitors like to travel without a rigid itinerary, they nonetheless carry out extensive planning to structure their trip. Prepared itineraries or itinerary ideas are often used to learn about the destination, set expectations regarding travel times, and to serve as a boilerplate upon which they can build (and adjust) their own personalized plans.

While the itinerary ideas provide the boilerplate it is important that visitors can easily see additional information regarding complementary activities, attractions, and amenities to help them fill in their personalized plans for each specific destination on their itinerary.

4.6. Support efforts to increase air service to Montana

This Strategic Action strengthens Montana's tourism product development and marketing efforts.

Recommended Tactics

MTOT, Regions, CVBs, Communities, Tribes, Businesses & Organizations

- Strengthen state-wide coordination of efforts to increase air service.
- Provide data on tourism, such as origin and destination data, to support efforts by local airports and businesses to recruit additional airlines and/or flights to Montana's airports.
- Align marketing once new direct flights are committed to support continuation and expansion of the route(s).

Indicators of Success

- Tourism data is included in proposals and negotiations for and analysis of new routes.
- New routes are sustained with the support of the tourism industry.

Background & Rationale

During community input sessions and other meetings, key stakeholders expressed a desire to increase the number of airline flights and decrease the cost of flights to Montana. While the potential for increased tourism passengers alone cannot generally convince airlines to increase the number of flights, Montana's tourism community provides valuable support to those groups (primarily private businesses and airports) that are actively negotiating additional flights to Montana.

Montana tourism stakeholders can contribute origin and destination data, visitor destination data, financing, and destination community support to the groups negotiating with airlines. Once committed, additional flights can be supported by tourism marketing to help drive demand.

Resources

Further information on the process of acquiring airline routes in Montana can be found through the following sources:
Montana Air Service: Opportunities and Challenges (February 2007) at http://www.mdt.mt.gov/other/research/external/docs/research_proj/airchallenge/final_report.pdf
For a discussion on the Newark-Bozeman flight added in 2012, the City of Bozeman Economic Development Council meeting minutes at: http://tinyurl.com/bwet3dl
Missoula makes short list for low-cost service by Frontier Airlines, at http://tinyurl.com/ctpbdsh
Missoula Economic Partnership Air Service Task Force at http://www.missoulapartnership.com/tag/air-service-task-force/

4.7. Address communication and transportation infrastructure needs to support tourism and recreation

This Strategic Action strengthens Montana's marketing efforts and product development.

Recommended Tactics: Highways & Roads

TAC, MTOT, Regions, CVBs, Communities, Tribes, Businesses & Organizations

» Work closely with tourism partners to identify transportation infrastructure needs and pursue infrastructure funding under tribal, state, and federal transportation programs.

- Tourism partners include Montana Department of Transportation, public land management agencies, tribal governments, innovative programs like LINX in the Greater Yellowstone Region.
- Current funding programs include those under MAP-21, P.L. 112-14, www.fhwa.dot.gov/map21/summaryinfo.cfm.

» Develop the full potential of the Montana Scenic-Historic Byways Program, working closely with the Montana Department of Transportation and the Scenic Historic Byways Advisory Council (see www.mdt.mt.gov/travinfo/scenic/).

» Fully explore the eligibility of Montana's scenic-historic byways for federal support under the new Transportation Alternatives program. (see ASLA issue brief at http://www.asla.org/FederalGovernmentAffairs.aspx?id=34517)

Recommended Tactics: Visitor Information Centers, Rest Areas, and Other In-State Information Dissemination Points

MTOT, Regions, CVBs, Communities, Tribes

» Implement redesigned Visitor Information Center (VIC) system.

» Establish a rigorous process to evaluate the cost-effectiveness of the VIC program and its value to stakeholders and visitors.

» Continue benefit-cost analysis of possible distribution methods, such as kiosks, Wi-Fi access, and alternative locations for stocking printed visitor information.

Recommended Tactics: Internet Access

Regions, CVBs, Communities, Tribes, Businesses & Organizations

» Where visitors do not have access to Wi-Fi or cell service, evaluate the need, value, and possibilities for expanding these services in the short term or over time.

» Where visitors do not have access to Wi-Fi or cell service, explore creative ways to meet visitor information needs (e.g., local wayfinding, widely available print maps or information). Collaborate with other stakeholders to devise a coordinated approach to providing information between "hot spots".

Indicators of Success

- Tourism stakeholders and partners collaborate effectively to access available transportation infrastructure funding.
- Existing programs for scenic and historic byways are fully utilized to support tourism.
- Visitor information is made available at physical locations throughout the state in a way that offers value to visitors and stakeholders and is cost effective.
- Visitor information is effectively provided even where Wi-Fi and cell service are not available.
- Stakeholders work to support increased Wi-Fi and cell service, where the need, value, and viability are firmly established.

Background & Rationale

Meeting visitors' infrastructure needs and expectations is important in conversion of visitors and in the delivery of a good visitor experience.

Visitors often perceive cellular and Wi-Fi access as necessities not luxuries. Even for those wishing to be "off the grid", there is often a desire to have access to cell and Wi-Fi to obtain visitor information on the ground. Lack of access to these communications tools can significantly increase the perception of Montana as remote and poses an increased risk that the visitor experience might not be good. Montana's tourism stakeholders should work with cell and Wi-Fi service providers to offer access in as many places as possible. Where access cannot be offered, a creative approach should be devised to ensure that visitors can still obtain all of the information and support that they need and want.

Similarly, Montana's tourism community must work together to ensure that the physical availability of visitor information and support on the ground – e.g. through Visitor Information Centers, rest areas – continue to meet the evolving needs of the visitor in a cost-effective manner.

Public lands lose their value as a tourism asset if they cannot be adequately accessed, and may lose their appeal if other visitor infrastructure is absent. Working closely with public land management agencies can improve the availability of public infrastructure.

5.1. Strengthen strategic guidance, communication and coordination of the Montana tourism industry

This Strategic Action strengthens Montana's tourism product and marketing efforts and builds respect for the tourism industry in Montana.

Recommended Tactics

TAC, MTOT

» Work together to select the most pressing priorities from the Strategic Plan for Montana's tourism industry, giving consideration to the priorities of individual Regions and CVBs. Adjust the industry-wide priorities over time.

» Communicate priorities and the rationale behind them clearly and consistently to all stakeholders.

» Continue efforts to make communication with and reporting by Regions and CVBs easier, efficient, and effective.

MTOT

» Actively manage the strategic plan as a "living document" to maintain its relevance:

- establish a formal process by which the strategic plan may be amended;
- review and moderate feedback from stakeholders;
- incorporate additional strategic actions and recommended tactics, as needed;
- alter strategic actions or recommended tactics as needed to improve their efficacy; and
- eliminate strategic actions or recommended tactics that are found to be ineffective or counterproductive.

» Give businesses and organizations a clear and convincing business case for being actively engaged with MTOT, Regions, CVBs, and the Strategic Plan.

» Continue seeking out ways to strengthen two-way communication with all stakeholders and make it easy for even small stakeholders to remain engaged

» Develop a "community relations" plan to assess, guide, and improve the effectiveness of communications with all stakeholders. Include specific strategic objectives to guide communication with businesses and organizations, such as:

- helping them understand how the Montana Brand directly applies to their operations;
- ensuring that they see the MTOT, Regions, and CVBs marketing campaigns that are inspiring their potential customers;
- giving them key insights from data and analytics, and showing how these insights can help their businesses and organizations; and

- building broad awareness of technical and financial resources available to businesses and organizations and noting how to make use of the resources (such as the strategic plan, knowledge and learning tools, research, cooperative marketing opportunities, grant opportunities, and sustainable business training/certification).

» Establish mechanisms for peer collaboration amongst businesses and organizations – help them work together on their own initiative by providing them with some simple tools. For example, consider establishing online discussion boards (e.g., Yahoo Groups) where stakeholders can collaborate on specific shared concerns, objectives, or initiatives. Reach out to encourage participation by a broad spectrum of tourism partners. If discussion boards are to be used, adopt protocols to be used by all boards; for example, limiting the scope of discussion, setting procedures for designating moderators, setting out the requirements for public access.

» Identify specific opportunities for cooperative efforts with Tourism Partners, open the conversation with the partner(s), and make the broader tourism community aware of the partnership. (For example, to implement Strategic Action 1.4.)

Regions, CVBs

» Develop a "community relations" plan to assess, guide, and improve the effectiveness of communications with all stakeholders in the Region/community.

» Communicate organizational strategies broadly and clearly to all stakeholders in the Region/community.

» Work cooperatively and communicate freely with other Regions/CVBs regarding implementation of the strategic plan and other actions requiring a coordinated effort.

» Recommend modifications to the strategic plan to MTOT, as needed and with sound rationale. Recommend incorporation of additional actions or tactics developed by or within the Region/community that have proven successful.

Communities, Tribes, Businesses & Organizations

» Understand the visitor experience promised by the Montana Brand, and how this promise is inspiring visitors through the marketing and promotion of MTOT, Regions, and CVBs. (Then consider how your tourism product could fulfill the visitors' expectations so you can convert the visitors into your customers.)

» Commit to staying aware of what MTOT and your Tourism Region/CVB are doing, using the communication tool(s) that fit you best. (Then consider how you could leverage their efforts to get the greatest benefit for your business or organization.)

» Take advantage of training and learning opportunities offered by MTOT, Regions, and CVBs.

» Use the research conducted by ITRR and that contracted by MTOT, Regions, and CVBs to strengthen your business or organization.

» Provide feedback to MTOT, Regions, and any other relevant industry members regarding effective or ineffective strategic actions. Share success stories as well as any additional information and resources that you discover.

» Seek opportunities to collaborate with your fellow tourism businesses and organizations – share ideas and experiences, discuss challenges you share, and brainstorm solutions.

Indicators of Success

» MTOT, Regions, and CVBs have "community relations plans" in place to strengthen communications with stakeholders.

» Communications from MTOT, Regions and CVBs to businesses and organizations are effective and valued by businesses and organizations, as demonstrated by broad stakeholder engagement and implementation of ideas (shared through the described communication and feedback mechanisms).

» MTOT, Regions and CVBs are aware of and attuned to the needs and concerns of industry members. Marketing and promotion efforts by DMOs are overtly connected to sales and delivery of the brand promise by frontline businesses and organizations.

» The strategic plan is amended to incorporate new, innovative, and effective strategic actions, as well as emerging best practices and knowledge for DMOs and industry members, while unnecessary or ineffective elements of the Strategic Plan are deleted.

» Feedback and success stories are contributed by a variety of stakeholders.

Background & Rationale

One of the key challenges of marketing a destination is that the "product" being sold is actually a *collection* of products and services (with fragmented ownership and many stakeholders) as well as a range of public goods (e.g., landscape, scenery, atmosphere) that *together* provide the visitor experience. Communication and coordination are essential for success and a vast body of research exists regarding the importance of these and the challenge they pose.

Destination marketing organizations (DMOs) play a central role in facilitating collaboration and building a cohesive tourism product by providing leadership, involving stakeholders in a meaningful way, and communicating effectively.

Current technologies (e.g. social media) allow the visitor experience to impact directly and immediately upon the success of branding and marketing. The marketing role of the DMO must therefore be closely integrated and aligned with the delivery role of other stakeholders. *The brand established by DMOs must resonate with stakeholders and it must be realistically deliverable by the stakeholders*. Businesses and organizations, in turn, must pay attention and respond to market feedback offered by the DMOs. While destination marketing organizations cannot control the marketing activities of individual players within the tourism industry, they can lead and coordinate them. DMOs can bring stakeholders together to cooperate rather than compete, and to pool resources to support an integrated marketing mix and delivery system. As alignment grows, DMOs are becoming prominent "destination developers", acting as catalysts for tourism development and supporting industry members' efforts to improve their competitiveness.

One factor that increases the difficulty of coordination by DMOs is the fact that the majority of tourism industry members are small businesses or organizations with limited time, resources, and capacity. After handling the immediate demands of operating their business or organization, there is little time left to attend to big picture tourism strategies. In order to win the active support and participation of front line stakeholders, it is valuable for the Regions and CVBs to offer them a strong business case for engagement in DMO efforts and provide guidance that has immediate and direct applicability to the operation or success of the front line business or organization.

Today there are many means of communication – intranet, online communities, email, RSS feeds, and snail mail, to name but a few. MTOT, Regions, CVBs and the TAC should collaborate to identify the most effective means of reaching stakeholders as part of the electronic media strategy (see Strategic Action 4.2).

5.2. Improve skills, knowledge and professionalism of tourism stakeholders

This Strategic Action strengthens Montana's tourism product and marketing efforts.

Recommended Tactics

MTOT, TAC, Regions, CVBs

» Develop a cohesive industry training and knowledge plan.

- Conduct needs assessments to identify the knowledge and skills most needed by industry members to succeed as individual businesses and organizations and collectively as an industry.
- Conduct needs assessments to identify the knowledge and skills needed by Montana DMOs and their Boards to succeed as organizations and to foster the success of their destinations.
- Evaluate the relative effectiveness and cost-effectiveness of live training; independent training tools such as training videos or interactive online tools; and download-able documents.
- Maximize the potential of existing industry gatherings – such as the Governor's Conference, TAC meetings, Regions & CVB meetings, Board meetings, and Superhost Training Seminars – and regular communication within the industry for training and knowledge-building. Use gatherings to inform needs assessments, provide training, and raise awareness of knowledge resources that are available.
- Identify and develop partnerships with entities that can provide valuable training.
- Establish follow up mechanisms after training or use of knowledge tools to gauge whether the skills or knowledge are being applied to business/organizational operations. Adjust the training plan as needed to improve uptake and application of resources.

» Create an easily accessible Resource Library for tourism stakeholders.

- Include how-to guides, self-evaluation guides, reports, templates, online training tools, and other resources that are relevant, digestible, and applicable to meet the identified needs of stakeholders.
- Make use of existing, publicly available resources to the greatest degree possible (using links and abiding by fair use protocols).
- Encourage contributions by stakeholders of useful resources they have found, and acknowledge these contributions.
- Index ITRR materials to ensure that stakeholders can easily locate the specific information they need or want.

» Explore opportunities for peer-to-peer learning.

- Develop a template for success stories to ensure that they will offer insights, lessons learned, and best practices for readers. Strongly encourage and acknowledge contributions of success stories.
- Consider establishing online discussion boards (e.g., Yahoo Groups) where stakeholders can collaborate on specific shared concerns, objectives, or initiatives. If discussion boards are to be used, adopt protocols to be used by all boards; for example, limiting the scope of discussion, setting procedures for designating moderators, and setting out the requirements for public access.

» Evaluate the target audiences, subject matter, and effectiveness of the Superhost training programs. Expand, revise, and update the programs based on current research and best practices from the tourism and adult learning fields, and on needs assessments that have been carried out.

Regions, CVBs, Communities, Tribes

» Make full use of information and training tools to strengthen organizational capacity, organizational success, and sector success.

» Submit success stories from the Region or community for inclusion in the Resource Library.

» Facilitate training and learning ("capacity building") by businesses and organizations in the Region/community.

Businesses & Organizations

» Make full use of information and training tools to strengthen organizational success and sector success.

» Share proven successful ideas and activities and success stories by submitting them for inclusion in the Resource Library.

Indicators of Success

» Needs assessments and an evaluation of training methods have been used to develop a cohesive industry training plan.

» A well-curated collection of existing learning resources is readily available to stakeholders in a Resource Library. Materials are well-indexed, allowing stakeholders to easily find what is most useful to them. Training and information resources are available for Regions and CVBs to strengthen marketing skills and expertise in DMO best practices. Training and information resources are available for all stakeholders to improve functional knowledge and adoption of tourism industry best practices.

» Stakeholder gatherings and regular communications are used effectively to implement the training plan.

» Feedback from stakeholders indicates that training is being applied in their daily operations and has improved their operations.

- Learning and knowledge resources are frequently accessed by stakeholders. Feedback from stakeholders indicates that these resources have significant value for their operations and are easy to access and use.
- Success stories and other learning resources are submitted by stakeholders and collected by MTOT to expand and improve the Resource Library and the Strategic Plan.
- Current research and best practices from the fields of tourism and adult learning have been used to assess the Superhost training programs and make any necessary changes.

Background & Rationale

A good visitor experience depends upon good delivery by businesses and stakeholders, many of which are small businesses with few resources and limited capacity. As a result, training of these front line stakeholders is often identified as a critical success factor for destinations (Blackman, Foster, Hyvonen, Jewell, Kuiboer, & Moscardo, 2004).

DMOs, too, have limited resources and capacity but need to keep abreast of best practices in the industry. The training and information needs have become more acute in recent years as emerging technologies – the internet, mobile devices, and Web 2.0 – revolutionize the field of destination marketing (Hernandez, 2013). During strategic plan community input sessions, stakeholders expressed a need and a desire for knowledge in several key areas, including:

- visitor expectations and how to meet them;
- the utility and application of the Montana Brand for their business or organization;
- the utility of the strategic plan for their business or organization;
- how travelers use electronic media (especially mobile) and how stakeholders can make use of it effectively and with a low burden;
- improving customer service by frontline staff; and
- how to implement desired projects such as improving curb appeal.

Research confirms that small businesses face many obstacles to training – including time constraints due to day-to-day operational demands of the business; inflexibility of hours or location of training; and costs (of training and time lost). In addition, many attach a *low* value to training (particularly for staff) because direct benefits are difficult to identify.

<u>Small business owners, in particular, are most likely to seek learning materials when trying to address a specific problem</u>. Learning opportunities are most highly valued by small business operators when they (i) are directly relevant and immediately applicable to concrete business activities, (ii) offer new or updated information, and (iii) are highly informative. Small business learning is based upon the practical need to learn and adapt in the context of the business environment. As a result, "the business constantly needs to know what it needs to learn *how* it might learn it and *who* from." Similarly, research in the field of adult education finds that adults learn best when training has immediate applicability.

Research highlights the importance of conducting a needs assessment to identify concrete and immediate skills and knowledge that should be offered to stakeholders. Training resources, themselves, can be used to help establish needs. Training units can be developed to walk industry members through a self-evaluation of their own operation, for example self-evaluation of their product or service quality or of visitor satisfaction. The self-evaluations can then be used in aggregate to shape the choice of training materials to be made available and can help individual stakeholders in selecting materials and allocating their time to learning.

The mode of training is also important but studies have found conflicting preferences – interactive versus non-interactive; in-house independent learning versus off-site events; electronic versus print – suggesting that the specific preferences of *Montana* stakeholders must be discovered. Based upon comments made in community sessions, the initial indication is that independent learning tools are preferred due to the time constraints and the inflexibility of work hours faced by many small business operators.

Because electronic resources (interactive or not) will be an important cost-effective means of providing training and disseminating knowledge, this strategic action should be considered in the development and maintenance of an electronic media strategy (Strategic Action 4.2.).

Research has consistently found that gaining knowledge from *peers* is highly valued and more effective than learning from other sources, suggesting that informal exchanges of experiences as well as the dissemination of "success stories" may be a useful and cost-effective part of the training resources.

5.3. Expand distribution and use of key insights from research and analysis

This Strategic Action strengthens Montana's tourism product and marketing efforts.

Recommended Tactics

TAC, ITRR, MTOT

» Set a research agenda – incorporating academic research (ITRR), market research, and analytics – to identify and prioritize key research questions. Emphasize research questions that can directly:

- inform and improve marketing decisions;
- inform resource allocations;
- identify important and targetable market segments (using data-driven segments as well as demographic or psychographic segments);
- improve knowledge of travel motivations;
- understand the travel patterns and expenditures of specific segments;
- identify ways to improve visitor experiences;
- identify ways to extend the length of trips or the level of visitor expenditures; or
- measure tourism's economic impact for Montana.

» Use research and analysis to the fullest extent to ensure informed decisions regarding all activities.

» Improve stakeholder use of ITRR and other research by emphasizing distribution of insights from research – succinct notes on a specific finding that tie the finding to its practical application in the operations of stakeholders. For example, ITRR's 2011 Tourism Outlook reported on "top Montana attributes important to nonresident visitors". An insight could note that the top 5 are clean air, clean waterways, watchable wildlife, scenic vistas, and open space, and suggest that stakeholders check their websites to see if these attributes are reflected in images used. The report also indicated that access to public lands and access to waterways were ranked as "very important" by visitors. This could lead to a recommendation that stakeholders add nearby access points in their print and online visitor information and make sure their frontline staff knows about local access points.

» Improve stakeholder awareness of ITRR research. For example, include research insights (with a link to the full report) in each MTOT newsletter.

» Make it easy for stakeholders to find ITRR research to meet specific, immediate information needs. For example, include links to ITRR research within the Resource Library organized by practical topics or questions that tourism stakeholders might be seeking to address; enhance the search capabilities on the ITRR website; or adopt a common set of categories and terms used by MTOT, ITRR, and the TAC to tag and organize information for stakeholders.

» Continue and enhance collection of non-resident data by ITRR, ensuring that survey questions continue to provide valid data to meet the identified research needs of the tourism community.

- Make use of research conducted by or for other destinations.
- Utilize literature reviews of (non-ITRR) academic research as a cost-effective means to answer more general questions regarding best practices and tourism trends (for example, trends in sources of visitor information, traveler use of mobile devices or electronic word-of-mouth, factors in visitor satisfaction, geotraveler trends).
- Utilize the most current electronic tools, such as web analytics and online review and feedback mechanisms, to gain insights into visitors and the market.

Regions, CVBs, Communities, Tribes

- Suggest items for the state-wide research agenda.
- Use key insights from academic and marketing research to guide strategic and marketing planning.
- Explore cost effective means for local/regional data collection at existing points of contact, for example: surveys conducted by event, attraction, or amenity operators; or aggregation of lodging data.
- Utilize electronic tools, such as web analytics and online review and feedback mechanisms, to gain insights into visitors and the market.
- Disseminate key insights from academic and marketing research to local stakeholders.

Businesses & Organizations

- Actively seek to apply the research and analysis to improve day-to-day operations.
- Gather and use insights from electronic tools such as web analytics, analysis of data from ratings and review sites (e.g. TripAdvisor, Yelp); online reviews and feedback; and interaction through social media.
- Help spread awareness of research insights from MTOT, ITRR, the TAC, Regions, and CVBs to colleagues.

Indicators of Success

- A research agenda is adopted with direct ties to the business decisions and activities of stakeholders.
- Key insights are disseminated and improve use of research and analysis by stakeholders.
- Valid research and analysis plays a significant and overt role in guiding the strategic and marketing plans and decisions of stakeholders.
- Research and analysis are available in the Resource Library, in a form that is easily accessed and digested by stakeholders.
- Opportunities to collect additional valid data for marginal additional cost or effort are identified and implemented.

Background & Rationale

The value in research and analysis lies in its ability to improve the success of the industry as a whole and its stakeholders individually. Research – and allocation of resources to it – therefore must be driven by the needs of the industry and the potential to improve success.

Research "wish lists" can easily grow to be quite large and conducting primary research is often the first or only approach considered. To effectively use limited research resources, that wish list must be filtered down by asking "if we had this piece of information, how would it shape our decisions and activities?" Research questions that offer good strategic value should then be prioritized, with priority given to those that have the greatest potential for improving outcomes – improved economics, better visitor experiences, more effectiveness in operations or marketing, etc. The answers to priority research questions should be obtained in the most cost effective way.

A large body of research exists that is valid and offers insights that can be applied to Montana's tourism sector. Literature reviews can draw upon this body of knowledge and be analyzed for implications for Montana, providing insights at far lower cost than conducting original survey research in Montana. Montana has compiled non-resident data for a number of years, and can extract additional insights from this valuable data set. Data segmentation offers great potential for understanding of the travel patterns of visitors, which is more useful in many regards than analysis of the aggregated data. By disaggregating data to examine the travel patterns of specific groups, both product and marketing could be better targeted. Disaggregation could be done not only by demographic segments, but also by segments identified by their travel motivations or by similar travel patterns. For example, Nickerson and Moisey (1999) reanalyzed existing non-resident data using cluster analysis to identify five distinct groups on the basis of what most attracted them to Montana. The study offered useful insights into the characteristics of the groups and suggested marketing strategies for each. Additional data-driven segmentation of this kind (versus traditional segmentation by demographic traits or origin) could offer unique insights.

Other emerging sources of data that might meet the needs of individual stakeholders include data mining from ratings and review sites (e.g., compiling ratings data; content analysis to determine the most common positive and negative comments.)

Resources

Other DMOs whose research can be tapped for insights relevant to Montana include:

- Alberta (good source of tourism research *not* specific to Alberta and highly applicable to Montana) http://www.tpr.alberta.ca/tourism/research/;
- California (esp. for rural tourism) http://industry.visitcalifornia.com/Research/Travel-Market-Research/;
- Saskatchewan (esp. for Canadian and US travel trends) http://www.industrymatters.com/Marketing-and-Research;
- Oregon (esp. for national reports on outdoor recreation and adventure travel) http://industry.traveloregon.com/research/archive/;
- Idaho (many reports on topics of interest to Montana tourism) http://commerce.idaho.gov/tourism-grants-and-resources/Research/;

- Wyoming (to benchmark against a neighbor state's practices) http://www.wyomingofficeoftourism.gov/industry/pages/Research/research.html;
- South Dakota (to benchmark against a neighbor state's practices and for a limited amount of "other research" posted online) http://www.sdvisit.com/tools/research/;
- North Dakota (limited benchmarking and limited research on Canadian travel to the U.S.) http://www.ndtourism.com/industry/;
- Colorado (to benchmark cost reduction efforts and cost-effective approaches; to glean insights from contracted studies) http://www.colorado.com/research.

5.4. Make Montana tourism seamless and border-less

This Strategic Action strengthens Montana's tourism product and marketing efforts.

Recommended Tactics

MTOT, Regions, CVBs

- Encourage and facilitate cooperation across Regions. Identify areas that are not currently seamless, suggest solutions, and identify opportunities for cooperative efforts by Regions, CVBs, and stakeholders.
- Review electronic visitor information to ensure that it can be used seamlessly by visitors, paying particular attention to primary travel corridors.
- Seek out cooperative efforts to produce seamless visitor experiences and visitor information.

Businesses & Organizations

- Inform Regions and CVBs of cooperative efforts that industry members across regional and community boundaries are undertaking and seek their support.

Indicators of Success

- Assessment of tourism information from the visitors' perspective confirms that visitors are able to obtain information and plan trips seamlessly throughout the state.
- Towns and industry members in different Regions report that they can work cooperatively to promote multi-destination trips without administrative barriers.
- Examples of successful cross-Region cooperative efforts are submitted for inclusion in the Resource Library and the strategic plan.

Background & Rationale

Tourism stakeholders expressed frustration during community input sessions regarding their ability to work together across the administrative boundaries of Montana's Tourism Regions. Encouraging industry members to approach Regions with concrete proposals for cross-Region cooperative activities may help allay these frustrations. Regions, CVBs, the TAC, and/or MTOT may wish to establish a process for industry members to approach Regions and CVBs with multi-region proposals or requests for support. Successful examples of such projects should be included in the online Resource Library and the strategic plan to serve as inspiration or as templates.

Because visitors generally take multi-destination trips within Montana, it is important that they be able to plan those trips seamlessly across Regions. Region and CVB websites should be evaluated from the visitors' perspective to identify obstacles to multi-region trip planning, and resolving those failures should be a priority. MTOT and all region websites should look and feel cohesive, and must offer itinerary planning functionality.

5.5. Manage and leverage electronic word-of-mouth

This Strategic Action strengthens Montana's tourism marketing efforts.

Recommended Tactics

MTOT, Regions, CVBs, Communities, Tribes

- Encourage all stakeholders to make use of electronic word-of-mouth, provide the business case for doing so, and provide guidance on how to do so effectively.
- Incorporate electronic word-of-mouth tools (e.g., reviews, travel blogs) into electronic visitor information tools, allowing visitors to share their "breathtaking experiences".
- Link to exceptional online communities, threads, and blogs that contain positive reviews or word of mouth regarding your community, its tourism assets, and/or nearby tourism assets.

Businesses & Organizations

- Monitor electronic word-of-mouth for your product or service.
- Address problems identified by reviewers and respond to negative reviews with professionalism and good customer service.
- Link to review sites (e.g., TripAdvisor, Yelp) on your websites, allowing visitors to access your reviews easily.
- Encourage satisfied customers to post reviews.

Indicators of Success

- MTOT, Regions, and CVBs websites link to ratings and review sites.
- A majority of Montana's tourism industry members incorporate reviews into their websites.
- A majority of Montana's tourism industry members monitor their online reputation.
- Industry members use online reviews to identify problems, take actions to fix legitimate problems, and manage their online reputation by responding effectively to reviews.

Background & Rationale

Research has shown beyond a doubt that word-of-mouth recommendations have the single strongest effect on traveler decisions. Social media, social networking sites, and consumer generated content (collectively, "Web 2.0") have significantly extended the reach of word-of-mouth by making it available to a much wider audience.

Electronic word-of-mouth can significantly impact the decisions of travelers. In a recent World Travel Market study, a full 58% of travelers changed at least one aspect of a planned trip after consulting Web 2.0 sites, including 35% who changed their choice of hotel. Customer reviews have become an integral part of how people make purchasing decisions. 76% of people use online reviews to shape their decisions; 69% share online reviews with friends, family, or colleagues; and 63% are more likely to purchase from a site that offers reviews or ratings.

Electronic word-of-mouth can be a valuable business resource for tourism stakeholders in a number of ways. It is a valuable source of information for tourism industry members allowing them to better understand the likes, dislikes, and expectations of customers. Tourism providers can respond to negative word-of-mouth in a way that blunts its impact significantly. And businesses and organizations can tap electronic word-of-mouth as a powerful marketing tool by ensuring that potential customers are aware of positive reviews. Tourism promotion agencies have noted the importance of managing online reputation for their industry members and have developed useful guides to simplify the process and overcome the apprehension of small operators. One of the best examples is the Australia Tourism Data Warehouse, which has published tutorials on "Online Reputation Management" and on "TripAdvisor for Tourism". Within the bounds of fair use, Montana tourism stakeholders can be referred to these existing sources as a cost-effective way to help them adopt best practices.

Resources

Australia Tourism Data Warehouse "Tourism e-kit" tutorials at http://www.atdw.com.au/tourismekit.aspx.

5.6. Make Montana tourism a leader in online community marketing and customer advocacy

This Strategic Action strengthens Montana's tourism marketing efforts.

Recommended Tactics

MTOT, TAC, Regions, CVBs, Communities, Tribes

- Support businesses and organizations in developing electronic community marketing.
- Collaborate with stakeholders to identify the "go-to" online communities for each activity/interest that offers a niche market for Montana.
- Provide learning resources to guide stakeholders in effective electronic community marketing.
- Include links in visitor information to blogs, community threads, etc., where community members share their enthusiasm for Montana as a setting for participating in niche activities or interests. Help these "customer advocates" speak to their peers – past and potential visitors to Montana.

Businesses & Organizations

- Participate in the top online community(ies) related to key niche markets for your business or organization, serve as a source of accurate information, local insight, and enthusiasm for Montana as a setting for the activity/interest.
- Link to exceptional communities, threads, and blogs that could be linked on tourism promotion sites. Make MTOT and Regions aware of these resources.

Indicators of Success

- Montana tourism industry members are actively involved in online communities where they act as a resource for those interested in undertaking an activity or interest in Montana and promote Montana as a destination by sharing their specific knowledge and related enthusiasm. Niche markets grow in the long term through the resulting "community marketing".
- Trusted independent "customer advocates" (or "influencers") provide valuable word-of-mouth promotion for Montana and contribute to the growth of niche markets.

Background & Rationale

As user generated content and social media make electronic word-of-mouth a growing force in consumer decisions, a modern form of "community marketing" is emerging.

"Community marketing" is focused on being part of the community and meeting the needs of the community – for example, a local hardware store builds a base of loyal customers by being a trusted source of knowledge. Community marketing is re-emerging within *online* communities that tie people together around a shared interest, activity, or goal.

Montana tourism is well placed to develop effective online community marketing because many tourism industry members are personally passionate about the activities or interests that draw their niche market

customers (e.g., fishing, hiking, biking, photography). Note that while each niche activity may have a small following, they can contribute significantly to overall tourism numbers. Wyoming's Office of Tourism found that niche activities *motivated* the choice of Wyoming for 47% of the state's 2012 visitors (compared to 46% of visitors motivated by visiting a national park) (http://www.wyomingofficeoftourism.gov/industry/pdf/homepage/2012VisitorProfileStudy.pdf, slide 16).

By participating actively in online communities serving these interests, industry members can establish themselves as a trusted source of expert or local information *and* share their enthusiasm for pursuing these activities/interests in the *superb* setting of Montana. This promotes Montana as a destination and also builds a pool of loyal customers for the stakeholder's business (e.g., lodging, guide services). This provides targeted marketing in the social media realm (targeting an online community, like avid fishermen, the way one would target a physical community like Minneapolis). The business benefits emerge over the *long-term* but are important.

Closely related to the concept of online community marketing is the Web 2.0 phenomenon of "influencers" or "customer advocates" – those who influence others through their electronic word-of-mouth recommendations. Again, Montana has a wealth of potential influencers. For any niche activity or interest that brings in non-resident visitors, there are Montanans (or admirers of Montana) who are blogging or posting on community forums with honest and passionate tales of the experiences that the state has to offer. By linking to these word-of-mouth praises, Montana allows them to provide sincere advocacy for the state as a great destination.

Resources

For an understanding of "online community marketing" see the 2012 article by Bill Lee on the Harvard Business Review Blog Network at http://blogs.hbr.org/cs/2012/08/marketing_is_dead.html.
The Australian Tourism Data Warehouse "online tourism communities" tutorial provides basic information on joining and engaging in online communities at http://www.atdw.com.au/media/1523/Tutorial_42_-_Online_Tourism_Communities.pdf.

5.7. Continue to carry out consumer marketing and media relations to attract non-resident visitors

This Strategic Action strengthens Montana's tourism marketing efforts.

Recommended Tactics

MTOT

- Continue targeted marketing to domestic non-resident markets using traditional and electronic media. Continue to base marketing decisions upon research and evaluate effectiveness of marketing campaigns.
- Continue to develop effective cooperative marketing opportunities for industry members. Ensure that industry members are well informed regarding the marketing campaigns and the research that guides them.
- Continue to carry out well-targeted media relations to solicit media coverage for Montana as a leisure travel destination.
- Assist Regions, CVBs, communities, and tribes to successfully pitch stories and conduct media relations.
- Widely disseminate resulting media coverage to stakeholders.

Regions, CVBs, Communities, Tribes

- Participate in cooperative marketing campaigns that offer appropriate target markets and good value. Collaborate with MTOT to evaluate the effectiveness of campaigns.
- Continue targeted marketing to domestic non-resident markets using traditional and electronic media. Continue to base marketing decisions upon research and evaluate effectiveness of marketing campaigns.
- Continue to carry out well-targeted media relations to solicit media coverage for Montana as a leisure travel destination. Identify potential stories and pitch them to appropriate media sources, focusing on out-of-state media.
- Collaborate with and support MTOT to successfully conduct media relations.
- Widely disseminate resulting media coverage to stakeholders.

Businesses & Organizations

- Identify potential stories and pitch them to appropriate media sources, focusing on out-of-state media.
- Collaborate with and support MTOT, Regions, and CVBs to successfully conduct media relations.

Indicators of Success

- Well targeted marketing brings high conversion rates and a stronger return on investment (ROI) for marketing expenditures.
- Regions and CVBs deem the cooperative marketing opportunities to be valuable and use them as an important part of their marketing plans.
- Awareness and top-of-mind awareness are improved by media exposure generated by media relations.
- Regions, CVBs, communities, tribes, businesses and organizations successfully pitch more stories to out-of-state publications.

Background & Rationale

MTOT's geographically targeted consumer marketing has proven very successful and produced an improved ROI, based on conversion studies.

Cooperative marketing opportunities offered by MTOT have provided a significant ROI for participating stakeholders, particularly in online marketing campaigns. Participation promises to extend the budget of stakeholders, allowing them to leverage considerably off the MTOT marketing expenditures.

Well targeted media relations can result in low-cost, high-impact exposure for Montana. By helping Regions to pitch stories successfully, the skills of MTOT's media professionals are leveraged to generate even more exposure for the state.

5.8. Evaluate and target group and international markets

This Strategic Action strengthens Montana's tourism marketing efforts.

Recommended Tactics

MTOT

- Continue to promote Montana as a destination to domestic and international tour operators.
- Develop ways to accurately gauge the contributions of the domestic and international tour operators to tourism in Montana.
- Evaluate promotional efforts targeting domestic tour operators. Establish valid measurements of success and evaluate costs and benefits.
- Obtain research-based insights into the evolving characteristics, composition, and importance of "group travel" segments in Montana (see Strategic Action 5.3.).
- Continue to promote Montana as a destination to international visitors, independently and through multi-state partnerships.

Regions, CVBs, Communities, Tribes

- Develop valid, research-based ways to accurately gauge the volume of Regional/local visitors attributable to domestic and international tour operators.
- Collaborate with MTOT to carry out promotion to tour operators, where justified by research and analysis.
- Target select group markets, assessing the relative importance and potential of traditional group markets (e.g. packaged group travel, meetings, incentive travel) as well as emerging non-packaged group travel (e.g., man-cations, girlfriend getaways).
- Evaluate the relative effectiveness and return on promotion to targeted group market segments.
- Work with Rocky Mountain International and MTOT on marketing and promotion to attract overseas group travelers and/or FIT (Foreign Independent Travelers), where justified by research and analysis.
- Evaluate the relative effectiveness and return on promotion to targeted overseas markets.

Businesses & Organizations

- Target select group markets, assessing the relative importance and potential of traditional group markets (e.g. packaged group travel, meetings/conventions) as well as emerging non-packaged group travel (e.g., man-cations, girlfriend getaways).
- Evaluate the relative effectiveness and return on promotion to targeted group markets.

- Carry out marketing and promotion to attract overseas group travelers and/or FIT (Foreign Independent Travelers), where justified by research and analysis.
- Evaluate the relative effectiveness and return on promotion to targeted overseas markets.

Indicators of Success

- Relative ROI based on increased visitation/expenditures is calculated for all promotional activities, when appropriate and possible, and used to prioritize resource allocations to each.
- Domestic and international tour operators offer more Montana product/overnights (preferably over a five-year moving average), showing a strong ROI on promotional activities.
- Visitation and related expenditures increase in targeted segments of the group market. Increases can be linked to promotional activities, with a strong ROI for promotional expenditures.
- Overseas marketing and promotion – directly and under the "Real America" banner – has demonstrable effects upon visitation from those markets.

Background & Rationale

As a "small" state with a limited budget for tourism promotion, it is particularly important for Montana to allocate its budget optimally, so as to maximize its impact on visitor expenditures. Promotional activities must be linked as directly as possible to increased revenue (private and tax) to make and justify budget allocations among the activities.

While tour operators are an important segment of the tourism market, reaching them through conventions can be a costly endeavor, making it particularly important to measure ROI. Because tour operators need time to produce new Montana products, the results of promotional activities lag somewhat and would be best measured by a multi-year moving average.

Other group travel segments should be pursued only if there is a strong business case to do so. For some communities, the "small meeting" segment of meetings and conventions travel may offer potential to generate nonresident travel, for example.

Co-branding with surrounding states to carry out overseas marketing is a strong approach, given the similarity of tourism products in the region. However, as electronic media make both overseas and domestic branding accessible to potential visitors overseas, it may become necessary to evaluate the alignment of the two branding messages. While measuring the volume of overseas visitors is very challenging, a number of stakeholders offer anecdotal evidence of this segment's importance. The segment may warrant efforts to establish valid measures of ROI.

5.9. Continue to promote Montana as a competitive, creative, and viable filming location

This Strategic Action strengthens Montana's tourism marketing efforts.

Recommended Tactics

MTOT

- Continue to promote and administer the Montana film incentive programs (currently Big Sky on the Big Screen Act and the Montana Big Sky Film Grant).
- Continue to apply the incentive programs in a targeted and cost-effective way.
- Support legislative extension of the Big Sky on the Big Screen Act, recommending any modifications to improve competitiveness of Montana or cost-effectiveness of the incentive programs.

Regions, CVBs, Communities, Tribes, Businesses & Organizations

- Continue to collaborate with MTOT and support efforts to attract filming to your area.

Indicators of Success

- Film promotion and incentives have been allocated strategically to projects that offer a significant degree of positive exposure for Montana. Projects receiving support show a net positive economic impact in the state.

Background & Rationale

MTOT's film promotion office has successfully used targeted support rather than joining a "race to the bottom" by trying to compete with subsidies from large-budget states. Continuing to quantify the exposure generated through these activities and consistently pursuing cost-effectiveness in these programs will help maintain legislative support for their continuation.

5.10. Carry out public and media relations to build respect for the tourism industry

This Strategic Action builds respect for the tourism industry in Montana.

Recommended Tactics

ITRR

- Provide valid and objective research and analysis regarding the economic impacts of Montana tourism.
- Ensure that valid and objective data is widely available regarding the tourism industry's role in Montana's economy.

TAC, MTOT, Regions, CVBs

- Disseminate accurate information regarding the economic and social benefits of tourism in the state/region/community.
- Solicit media coverage regarding the benefits of tourism in the state/region/community.
- Solicit media coverage of Montana tourism success stories.
- Provide tourism stakeholders and tourism partners with data, research, analysis, and other communications regarding successes and benefits of tourism to share with elected officials, community members, and other interested parties.
- Provide elected officials with data, research, analysis, and press releases regarding success stories and economic benefits of tourism.

Businesses & Organizations

- Share data and information regarding tourism's successes and benefits with elected officials and community members.
- Encourage local media to cover tourism stories.
- Let the community know when the business or organization uses local or Montana products (see Strategic Action 2.5.).

Indicators of Success

- Local press coverage of tourism successes, the benefits of tourism, and tourism stories is more extensive and more prominent.
- Neither the lodging tax nor its partial allocation to tourism promotion is threatened in the state legislature.
- City and county elected officials voice support for tourism as part of a sustainable local economic base.

Background & Rationale

"Respect" for the tourism industry is one of three key pillars identified by the Tourism Advisory Council to be strengthened through the strategic plan.

By raising awareness of the economic importance of tourism among elected officials, the business community, and the general public, the industry can win a broad base of public support, which in turn will help preserve and enhance the lodging tax and the tourism industry.

Gathering and publicizing valid data will provide quantitative support for tourism's economic and social contributions. Gathering and publicizing success stories provides quantitative and qualitative evidence of tourism's positive attributes, such as the innovation and entrepreneurialism of the industry, the amenities it brings for Montana residents, the community spirit and pride it can foster, and the economic successes it achieves.

Sharing information regarding the economic value of tourism also helps land management agencies evaluate the balanced use of public lands.

Raising awareness of economic importance among the industry's own stakeholders enables them to become more effective advocates for tourism – individually and collectively – at the state and local levels.
Working on a consistent basis to track tourism's successes and build a strong base of respect can strengthen Montana tourism stakeholders' position when defending the industry and the lodging tax during legislative sessions and with the executive branch.

5.11. Continue to provide financial and technical support for tourism projects

This Strategic Action strengthens Montana's tourism product development.

Recommended Tactics

MTOT

- Broaden awareness of technical and financial programs supporting tourism in Montana, in particular: the Tourism Infrastructure Investment Program (TIIP grants); the Special Event Grant Program (SEGP); and the Tourism E-Marketing Technology Grant.
- Ensure that grant programs support efforts that (i) are consistent with the Montana Brand and (ii) contribute to the industry strategy. Evaluate the effectiveness of grants.
- Monitor the needs of the industry and the value of grant programs to identify necessary changes or additions.
- Maintain an updated list of tourism-related technical and financial assistance programs provided by various public and private sources.

Indicators of Success

- Grant awards have demonstrable benefits: increasing visitation and visitor expenditures, improving delivery of the brand, or strengthening Montana's tourism offering in valuable ways.
- Grant programs are evaluated and found to contribute strongly to strategic goals.
- Stakeholders have access to updated information about other tourism-related technical and financial assistance programs provided by various public and private sources.

Background & Rationale

MTOT currently offers three grant programs designed to provide financial support to the tourism sector. The Tourism Infrastructure Investment Program (TIIP) provides grant funding for tourism-related facilities and for the preservation of Montana's cultural and historical assets. The Special Event Grant Program is designed to help promote "hallmark events" that diversify and enhance Montana's tourism product. The Tourism E-Marketing Technology Grant helps businesses improve their competitive e-marketing position. As with all lodging tax expenditures, the funds allocated to these grant programs must be evaluated for effectiveness. Success can be measured in increased visitor expenditures, substantive improvement in Montana's tourism product, business success, or creation or preservation of important tourism assets. Outcomes can be difficult to evaluate accurately. Using comparison groups can improve the validity of evaluations where external factors play a role. For example, to evaluate an SEGP grant in terms of increased visitation, in addition to looking at attendance versus previous years, it is useful to look at attendance numbers for comparable events to separate the effects of the grant from the effects of weather or changes in the economy.

Resources

A good reference work on evaluating economic development activities is Bartik and Bingham (Bartik & Bingham, 1995), available at http://research.upjohn.org/up_workingpapers/29/.

Appendix A: Guidance for Small Businesses & Organizations

The 2013-2017 Montana Tourism and Recreation Strategic Plan is written for all tourism stakeholders, including the small businesses and organizations that deliver the Montana visitor experience. Almost every Strategic Action has recommended tactics for the small business or organization. The following checklist will help the small, frontline stakeholder navigate the Strategic Plan by pulling out priority activities and referencing the Strategic Actions that address them.

- **Monitor and respond to "electronic word-of-mouth", e.g. online review ratings, reviews, and social media mentions.**

  Strategic Action 5.5. Manage and leverage electronic word-of-mouth.

  Strategic Action 4.3. Stay current with social media tools for effective interaction and relationship building with visitors.

  Strategic Action 4.2. Design online and mobile communication tools to meet the evolving needs of visitors.

- **Make full use of official tourism websites to attract customers by providing up-to-date information to MTOT and to your Tourism Region and CVB.**

  Strategic Action 4.2. Design online and mobile communication tools to meet the evolving needs of visitors.

  Strategic Action 5.1. Strengthen strategic guidance, communication, and coordination of the Montana tourism industry.

- **Encourage and train staff to provide outstanding professional and courteous service.**

  Strategic Action 5.2. Improve skills, knowledge, and professionalism of tourism stakeholders.

- **Keep business or organization website up to date, informative, and enjoyable.**

  Strategic Action 4.2. Design online and mobile communication tools to meet the evolving needs of visitors.

  Strategic Action 3.4. Build excitement about Montana among niche market enthusiasts.

- **Consider offering online transactions (e.g. booking, ticketing).**

  Strategic Action 4.2. Design online and mobile communication tools to meet the evolving needs of visitors.

- **Ensure that essential information and website functions can be accessed via mobile device.**

  Strategic Action 4.2. Design online and mobile communication tools to meet the evolving needs of visitors.

- **Provide visitors with suggestions for other activities, attractions, and experiences in the area.**

  Strategic Action 3.2. Present a balanced and cohesive visitor experience in all marketing and visitor information.

  Strategic Action 3.1. Present each town in the context of its surroundings.

- **Use local or Montana products – let visitors know, and let the community know.**

  Strategic Action 2.5. Support local and Montana products and businesses to build economically vibrant towns.

  Strategic Action 5.10. Carry out public and media relations to build respect for the tourism industry.

- **If seasonal, coordinate seasonal opening/closing with other area tourism providers.**

  Strategic Action 2.7. Expand tourism seasons through local coordination.

- **Interact online with key communities of potential customers.**

  Strategic Action 5.6. Make Montana tourism a leader in online community marketing and customer advocacy.

  Strategic Action 3.4. Build excitement about Montana among niche markets enthusiasts.

  Strategic Action 4.3. Stay current with social media tools for effective interaction and relationship building with visitors.

- **Implement or lead curb appeal improvements in the community.**

  Strategic Action 2.4. Improve curb appeal of towns.

- **Participate actively in the local, Regional, and state tourism communities.**

  Strategic Action 5.1. Strengthen strategic guidance, communication, and coordination of the tourism industry.

  Strategic Action 5.2. Improve skills, knowledge, and professionalism of tourism stakeholders.

  Strategic Action 5.3. Expand distribution and use of key insights from research and analysis.

  Strategic Action 5.4. Make Montana tourism seamless and border-less.

  Strategic Action 1.4. Participate in planning processes for public lands management.

  Strategic Action 2.8. Address the short- to long-term effects of the Bakken oil boom for tourism.

- **Address the short- and long-term impacts of the Bakken oil field, and tap the potential tourism market of the oil field population.**

  Strategic Action 2.8. Address the short- to long-term effects of the Bakken oil boom for tourism.

Appendix B: Guidance for Communities & Tribes

The 2013-2017 Montana Tourism and Recreation Strategic Plan is written for all tourism stakeholders, including the communities that have no Convention & Visitors Bureau and Indian Country. Almost every Strategic Action has recommended tactics for communities and tribes. The following checklist will help these stakeholders navigate the Strategic Plan by pulling out priority activities and referencing the Strategic Actions that address them.

- **Introduce potential visitors to the unique personality and charm of the community.**

  Strategic Action 2.2. Highlight the most charming and desirable elements of each community.

  Strategic Action 4.3. Stay current with social media tools for effective interaction and relationship building with visitors.

  Strategic Action 5.5. Manage and leverage electronic word-of-mouth.

- **Present the community in the context of its natural surroundings and the experiences it offers the visitor (in and out of town).**

  Strategic Action 3.1. Present each town in the context of its surroundings.

  Strategic Action 3.2. Present a balanced and cohesive visitor experience in all marketing and visitor information.

  Strategic Action 1.2. Integrate public lands more fully and functionally into tourism information.

  Strategic Action 1.3. Present natural assets in an experiential manner.

  Strategic Action 3.4. Build excitement about Montana among niche markets enthusiasts.

  Strategic Action 5.6. Make Montana tourism a leader in online community marketing and customer advocacy.

- **Promote the community as part of a multi-destination itinerary.**

  Strategic Action 3.3. Present a seamless and borderless visitor experience in all visitor information.

  Strategic Action 4.5. Offer itinerary ideas and traveler tips to help visitors structure their plans.

  Strategic Action 5.4. Make Montana tourism seamless and borderless.

  Strategic Action 5.7. Continue to carry out consumer marketing and media relations to attract non-resident visitors.

- **Provide ample information for the visitor.**

  Strategic Action 4.2. Design online and mobile communication tools to meet the evolving needs of visitors.

  Strategic Action 4.3. Stay current with social media tools for effective interaction and relationship building with visitors.

Strategic Action 3.2. Present a balanced and cohesive visitor experience in all marketing and visitor information.
Strategic Action 3.1. Present each town in the context of its surroundings.

Strategic Action 5.5. Manage and leverage electronic word-of-mouth.

Strategic Action 5.6. Make Montana tourism a leader in online community marketing and use of customer advocates.

- **If tourism is highly seasonal for the community, work together to reduce the negative impacts.**

  Strategic Action 2.7. Expand tourism seasons through local coordination.

  Strategic Action 3.4. Build excitement about Montana among niche markets enthusiasts.

  Strategic Action 5.6. Make Montana tourism a leader in online community marketing and customer advocacy.

- **Implement or lead curb appeal improvements in the community.**

  Strategic Action 2.4. Improve curb appeal of towns.

- **Evaluate the need for wayfinding improvements and seek out cost-effective solutions.**

  Strategic Action 2.3. Evaluate and pursue essential local wayfinding solutions.

- **Participate actively in the state, Regional, and local tourism communities.**

  Strategic Action 5.1. Strengthen strategic guidance, communication, and coordination of the tourism industry.

  Strategic Action 5.2. Improve skills, knowledge, and professionalism of tourism stakeholders.

  Strategic Action 5.3. Expand distribution and use of key insights from research and analysis.

  Strategic Action 5.10. Carry out public and media relations to build respect for the tourism industry.

  Strategic Action 1.4. Participate in planning processes for public lands management.

- **Tap the potential tourism market of the Bakken oil field population, and address the short- and long-term impacts of the Bakken development.**

  Strategic Action 2.8. Address the short- to long-term effects of the Bakken oil boom for tourism.

Appendix C: Montana Tourism & Recreation Charter and Principles

In 2007, the Tourism Advisory Council adopted the following Principles and the Charter upon which they are based. The Charter remains relevant to the current Strategic Plan.
Charter Principles:

1. Maintain integrity of place and destination appeal
2. Promote and highlight the businesses, services and opportunities that are unique to Montana
3. Promote sustainable resource conservation, including conservation of energy, water and wildlife
4. Participate in and help lead community stewardship partnerships to maintain Montana assets
5. Identify and appeal to markets that value and seek to help sustain Montana's distinct characte
6. Foster a diversity of products and services that meet the demand of a demographic cross-section of the "geotourism" market
7. Ensure visitor satisfaction and an enduring market demand through education of Montana residents about the benefits of sustainable tourism
8. Work with Institute for Tourism and Recreation Research, Montana Office of Tourism and other tourism organizations throughout the state to evaluate effective implementation of the Tourism Charter

Montana Tourism and Recreation Charter:

WHERE AS the travel and recreation industry of Montana recognizes our greatest asset in today's marketplace is Montana's great outdoors and pristine environment, including the headwaters of the continent, scenic vistas, wide open spaces, and abundant and charismatic wildlife;

AND WHERE AS our exceptional outdoor places are enhanced by equally distinctive communities, with a rich history of friendliness, authenticity, artistic traditions, and a people who derive their solid intellectual and creative capital from Montana's strong sense of place;

AND WHERE AS the people of the twelve tribal nations of Montana sustain an enduring cultural heritage and land ethic and provide opportunities for distinctive, enriching and educational experiences for visitors, particularly through culturally appropriate tourism businesses owned by American Indians;

AND WHERE AS we understand that Montana's collective authentic character represents values that are increasingly in demand by the economically and socially desirable "geotourist" market 1 including many business travelers and most leisure travelers. These travelers share many common values with most Montanans, including a desire to maintain the unique and authentic character of places;

AND WHERE AS the greatest long-term economic advantage for Montana's travel and recreation industry, lies with the geotourism market and other visitors who share the respect that Montana residents and communities have for our natural and cultural assets;

AND WHERE AS we have observed that despite increasing market demand, there are ever fewer places in North America that have retained their authentic feel and sense of place as they are "discovered" and changed;

AND WHERE AS the Montana character won't be maintained through benign neglect but rather requires shared commitment and continuous attention.

THEREFORE, the State of Montana, the Montana State Tribal Economic Development Commission and Montana's travel and recreation industry adopt this charter of stewardship and commitment to individual community-based economic development, promotion and conservation of the unique and treasured Montana character. From this point forward, we resolve to advocate, forge partnerships and take individual and collective actions to guarantee that the authentic and highly valued Montana experience is available for future generations of residents and visitors.