









# Destination Stewardship Plan

A NEW VISION FOR TOURISM TO BENEFIT WESTERN MONTANANS



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The Destination Stewardship Plan sets a new direction for Glacier Country’s visitor economy. It is the outcome of a community-driven process initiated by Glacier Country Tourism and guided by a Steering Committee of community leaders.

Our goal is to balance a thriving visitor economy with the long-term health and vibrancy of our communities.

## STEERING COMMITTEE MEMBERS

- + [Dylan Boyle](#), Executive Director, Whitefish Convention & Visitors Bureau
- + [Shannon Britz](#), Director of Conference & Event Services, University of Montana
- + [Ray Brown](#), Executive Director, Sanders County Community Development
- + [Loren Flynn](#), Region 2 Park Manager, Montana Fish, Wildlife & Parks
- + [Amber Pacheco-Holm](#), President, Libby Area Chamber of Commerce
- + [Carole Johnson](#), Ranger, Superior Ranger District
- + [Matt Lautzenheiser](#), Executive Director, Historical Museum at Fort Missoula
- + [Victoria Lee](#), Public Relations, Glacier Distilling Company
- + [Aubrie Lorona](#), General Manager/Vice President Finance and Administration, Swan Mountain Outfitters
- + [Riley Polumbus](#), Marketing & Community Relations, Logan Health
- + [Rep. Katie Sullivan](#), Montana State Legislature
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### PROJECT TEAM

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# FOREWORD

Western Montana is quickly evolving. When we started our work to promote Glacier Country as a visitor destination in 1987, tourism was a secondary industry, supplementing economic staples such as forestry and agriculture. Now, tourism is one of the top two industries in Montana, bringing in billions of dollars to our state's economy and supporting tens of thousands of jobs for Montana residents each year.

At the same time, visitation has grown so much in our area that some communities are at or near capacity during peak summer months. Over the past two years, places with wide-open spaces like Glacier Country saw record-breaking numbers of visitors who were looking to escape the pandemic. We recognize the industry's rapid growth has brought challenges as well as benefits. Public infrastructure, already suffering from decades of underinvestment, has struggled to cope with increasing visitor and resident populations. The demand for workers has outpaced the available supply, exacerbated by issues like the lack of affordable housing. And locals may find their favorite hiking trail, fishing spot or campsite is now overwhelmed and unavailable for their use.

We know that tourism in a place as unique as Glacier Country must be done in a way that preserves all that makes our region such a special place to live, work and visit. Tourism should be good for Western Montana and good for Montanans. This plan was developed with the goal of balancing this growth with the long-term health and vibrancy of our communities.

What makes destination stewardship different from marketing and management is the process by which we do what we do. It's a shift from promoting communities to engaging and stewarding communities, which in turn provides more livable and sustainable destinations. It's an opportunity to build a shared vision for the future of our visitor economy, ensure we protect our way of life and the lands we love, and strengthen our communities for generations to come.

Achieving this vision is not a linear process and by no means a quick win. This plan is the beginning of a new, ongoing dialogue with our communities. So far, there has been tremendous support for this plan, as well as enthusiasm to collaborate on its realization. It's our hope that the sharing of this plan represents the beginning of a new vision for tourism in Western Montana.

Sincerely,



Racene Friede  
President & CEO  
Glacier Country Tourism

# AN INCREASED FOCUS ON DESTINATION STEWARDSHIP

Glacier Country Tourism, since its inception, has been tasked with promoting Western Montana as a tourism destination. However, the time has come for the organization to think more holistically about its role.

In recent years there has been a growing need for, and interest in, greater stewardship, accelerated during the COVID crisis. This is being driven by a number of factors including, among others, increasing negative resident sentiment toward tourism, pressures on natural resources and infrastructure, livability issues related to housing and workforce, a growing need for resilience and increasing stakeholder interest in destination development and governance.

In this context, Glacier Country Tourism now is positioning itself as a destination stewardship organization. This is a collective and transformative mindset that calls for the organization to acknowledge and account for the interests of all stakeholders in Western Montana, including residents. It's a shift from promoting communities to engaging and stewarding communities, which in turn provides more livable and sustainable destinations.

In consultation with its industry partners and community stakeholders, Glacier Country Tourism paused its summer marketing campaign back in 2018. Instead, marketing resources have been directed to attracting visitors during seasons when partners are seeking more activity. Beginning in summer 2021, Glacier Country took another step toward stewarding the destination, introducing a new messaging campaign urging Western Montana visitors to "Recreate Responsibly." Based on widespread support for these moves, Glacier Country Tourism and its stakeholders now know their roles as marketers must adapt to new realities and community priorities.



In this new paradigm, the impact of tourism can no longer be measured solely in economic terms. We must also measure success against the well-being of destinations, considering nature, human health, and community identities. We must be thoughtful about how the quality of the visitor experience can be balanced with the quality of life for residents, about the types of visitors who would provide maximum financial value to our local communities while having the optimal social and environmental impact, and about how we can responsibly manage our tourism industry for the benefit of all in our communities.

To succeed, destination stewardship requires full community collaboration, engaging stakeholders from all walks of life. The long-term success of the tourism industry requires all of us to play our part. We can't do any of this without you.

# PUTTING MONTANANS FIRST

We love Western Montana, and we love the people who live and work here, striving every day to make our region so incredible. Montanans are the heart and soul of Glacier Country. They are the most important ambassadors of the region in which they live. They deserve to be a priority now. Montanans must be acknowledged and engaged when it comes to the impact future tourism will have on them and their living environment.

We have to be purposeful about how we develop a visitor economy that delivers benefits for all Western Montanans. On every level and in every area of Glacier Country, our residents must be included as shareholders in the visitor economy. We must be thoughtful about how we protect and preserve Montanan values and our way of life.

These values must be integrated in tourism development and planning. This will result in concrete and tangible interventions and solutions that increase the benefits and prevent or lighten the burdens of tourism.

This plan is the beginning of a new, ongoing dialogue with our communities. It is full of new initiatives that will be activated year by year throughout the life of this plan. Which initiatives come first? We'll be prioritizing based on what our communities say is most important. At times, Glacier Country Tourism will be leading the charge, supporting others in their pursuits when appropriate and advocating on behalf of residents and visitors when appropriate.



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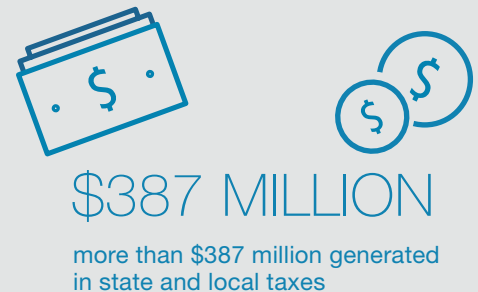
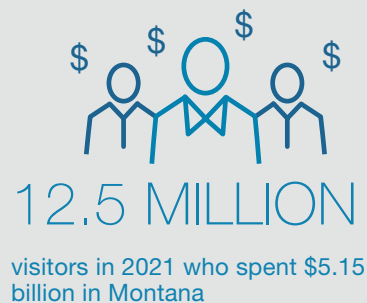
# THE IMPORTANCE OF MONTANA'S VISITOR ECONOMY

Tourism plays a critical role in driving Montana's economy. In 2021, nonresident visitors to Montana spent an estimated \$5.15 billion in the state, according to the Institute for Tourism and Recreation Research. This economic activity supported more than 68,000 jobs for Montanans and generated more than \$387,000,000 in state and local taxes.

These numbers are so astronomical, they're often difficult to fully comprehend. But when you speak with residents of Montana, you start to fully appreciate the impacts of our visitor economy. Some small-town gas stations are surviving because of the visitors who fill up their vehicles. Main streets are filled with local restaurants, breweries, shops and art galleries that might not exist without the visitor economy. Jobs and business opportunities are being created that help keep young talent in our state.

Beyond this immediate impact, the experience delivered by the visitor economy influences visitors' impressions of Montana, which can underpin future spending and investment decisions, drive demand for Montana products and services, and create lasting networks. The visitor economy fosters cultural exchange and helps share our unique Montana values with visitors from all over the world.

Residents of Western Montana understand the importance of the tourism industry. More than eight in 10 residents (85%) rated Tourism/Outdoor Recreation as either Extremely Important or Very Important to Western Montana's economy in a regional survey. However, currently less than half (46%) agree that the benefits of tourism outweigh the negative impacts.



Total contribution of tourism to Montana's economy was

\$7.56  
BILLION  
IN 2021



85% OF  
RESIDENTS

rate Tourism/Outdoor Recreation as Extremely Important or Very Important to Western Montana's economy



# OUR PLANNING APPROACH

The 12-month process to develop the Destination Stewardship Plan was anchored in a robust series of community engagement experiences to ensure that key stakeholders and residents were aligned around a collective vision for their future. Community members from across Western Montana shared their views on the opportunities and challenges in the local visitor economy in a variety of formats including: 16 community town halls, 11 focus groups with various industry and community segments, and more than a dozen one-on-one interviews. Engagement was supplemented with an extensive review of existing research and planning documents to ensure the strategies in this plan align with and support other plans.

In addition, more than 1,600 residents of Western Montana then participated in a regional survey, with the goal of identifying and defining general attitudes toward living in Western Montana's Glacier Country and tourism's impact on resident quality of life. More than 225 industry stakeholders also took part in an empirical destination assessment based on a comprehensive survey. The results identified opportunities and challenges for the region through the lens of tourism, and they provided a series of prioritized action items.

The results and insights gleaned from the research and engagement activities were then utilized in a visioning workshop to identify priorities that must be addressed in the plan. Potential goals and action items were then workshopped in a collaborative format. The workshop focused on three key areas: capacity building, visitor management and strategic planning.

The strength of engagement and alignment between all stakeholders is the key element toward building a successful Destination Stewardship Plan. It is a journey the people of Western Montana will take together, and one that will benefit residents, businesses and visitors for years to come.



16 Town Hall Sessions  
with 200+ attendees



1,600+  
Community Survey responses



225+  
Stakeholder Survey responses



11 Focus Groups  
with 50+ participants



12 1:1  
Interviews



30+ Visioning Session  
participants





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## WHAT WE HEARD

Community members and stakeholders across Western Montana were eager to contribute to this process, sharing their perspectives and creative ideas about quality of life in Glacier Country. We asked Western Montana residents to share their definition of destination stewardship and what they thought it meant for the region.

### HOW MONTANANS DEFINE DESTINATION STEWARDSHIP

- + *“Not losing sight of the feel of our community in the process of building it as a destination. Focusing on benefits to community members and reinvesting in their quality of life as we develop our tourism capacity and draw.”*
- + *“Ensuring that tourism does not change the fabric of our current economy and lifestyle.”*
- + *“It means responsible tourism, managing tourism so that we can protect the wonderful place we live in while benefiting from the economic boost that visitors bring.”*
- + *“Destination stewardship carries a responsibility of great importance. Stewardship implies taking care of the community, the wild places that attract visitors, the wildlife that inhabit the wild lands, and the natural ecosystems.”*
- + *“Not just letting tourism “happen to you.” Guiding tourism in ways that most benefit your community and economy. Utilizing tourism dollars to enhance the amenities that make a vibrant community for local residents.”*
- + *“Retaining the fabric of our communities—the genuine attributes that make these places desirable—and supporting the people who live here while being able to adapt to and support the needs of visitors into the future.”*
- + *“Balancing tourism with the needs and quality of life of residents.”*

The following key factors demonstrate where there was significant consensus relating to opportunities and challenges, which ultimately determined the strategic goals in this Destination Stewardship Plan. They have been ordered alphabetically, not in priority.

#### KEY ISSUES AND CHALLENGES

After hundreds of hours of community engagement with local residents and business stakeholders, these key takeaways provided a structured approach to identify and prioritize actionable strategies.

#### Community capacity challenges must be addressed through both seasonal and geographic visitor dispersal strategies

Nearly half (47%) of visitors to Montana come during the summer season (July to September) and three-quarters come during the April to September period. Unsurprisingly, community members indicated that the summer season was the time of year their communities felt overwhelmed with visitors, with 4th of July weekend being the pinnacle of overcrowding. At the same time, while some parts of the region felt overwhelmed with visitors, other parts of Western Montana expressed an opportunity to develop their visitor economies and attract more visitors. Therefore strategies must be created focusing on dispersing visitors both seasonally and geographically.

#### Disrespectful and disruptive visitor behavior has increased in the past two years

Whether it's trash discarded on the side of the road or just general rudeness to front-line service workers, community members expressed growing frustration with an increase in disrespectful behavior from some visitors. "Revenge travel" (getting revenge on travel plans canceled during COVID) has morphed into an attitude of entitlement for some. It was creeping in long before COVID and has since become much worse. Those that work in the service industry expressed a sense of exhaustion from dealing with disrespectful and disruptive visitors. When asked about the types of visitors that Glacier Country Tourism should focus on attracting, residents overwhelmingly selected "visitors who are respectful of the people who live here" and "visitors who care about protecting our natural resources."

To support my county's tourism economy, Glacier Country should focus on attracting... (10-point scale)



### Lack of affordable housing is creating unlivable communities and exacerbating other challenges

By far, the lack of housing diversity for full-time residents in Western Montana was the most discussed challenge throughout the region during the development of this plan. Housing diversity impacts almost every other issue in the area, including economic diversity, new talent and investment attraction, labor shortages, business closures, etc. It also impacts Western Montana's ability to develop a tax base to cover the increasing cost of public services and amenities year-over-year. Furthermore, COVID accelerated local housing and labor challenges with the increased influx of both new residents and outside investment in vacation home purchases. Eight in 10 residents surveyed (81%) agreed that tourism makes housing prices higher.

### Lack of funding mechanisms is prohibiting communities from fully capitalizing on the economic benefits of visitors

As noted earlier, visitors to Montana spent an estimated \$5.15 billion in the state in 2021. Montana created the Lodging Facility Sales and Use Tax (4% lodging tax and 4% rental car tax) in 2003 to help shore up a budget deficit. Today, 75% of the tax goes directly to Montana's General Fund and is available to the state legislature to allocate for needed services and programs. However, beyond that, without a sales tax or other funding mechanisms to generate revenue from visitors, residents don't feel visitors are contributing to costs of infrastructure improvements needed, general wear and tear to public amenities or to services utilized by visitors (fire, police, etc.). Funding mechanisms must be explored to ensure Montana's roughly 1 million residents aren't expected to bear the full cost of infrastructure to support its more than 12.5 million annual visitors. Municipalities such as the city of Whitefish, which implemented a 3% Resort Tax in 1995, have seen significant improvements in infrastructure and visitor/resident amenities.

### Multijurisdictional land management systems and the volume of public lands create governance challenges

Public lands managed by the federal government constitute about 30% of Montana's landmass and 50% of Glacier Country's. Multiple agencies manage these lands, including the U.S. Forest Service, the Bureau of Land Management, the U.S. Fish and Wildlife Service, and the National Park Service. State lands, which constitute about 5% of Montana's landmass, are managed by the Department of Natural Resources & Conservation and Montana Fish, Wildlife & Parks. The priorities and practices of these public land jurisdictions can vary widely. This can create challenges and missed opportunities for these agencies to manage outdoor spaces and waters in ways that optimize access for both visitors and residents while protecting the quality of these treasured resources.

### The impact of Montana's rapidly increasing population is sometimes confused with visitor pressures

More than 12.5 million visitors came to Montana in 2021. That represents an increase of almost 12% in visitor numbers over 2020, placing new pressures on both community and natural resource capacity. On top of this, local quality of life has been impacted by an influx of new residents relocating from places outside of Montana. According to the 2020 census data, Glacier Country's population increased by 7.3% or roughly 26,000 people since 2010. Montana is estimated to grow another 3.78% by 2022. These new residents at times bring behaviors that rub against the social and cultural fabric of their new communities. In the minds of many Western Montanans, this influx of new residents is very much associated with tourism. In fact, multiple communities indicated the type of visitor they'd like to see in Western Montana is "someone who comes to visit, but then leaves." Most of all, they crave visitors who share respect both for natural resources and for the local way of life.

### Rapid growth in visitor and resident populations has created pressure on local infrastructure

Local infrastructure, particularly in rural areas, has not been able to keep pace with the growing population of visitors and residents in Western Montana. A number of infrastructure challenges were identified, including wastewater systems, broadband internet access, campground infrastructure and more. But transportation infrastructure was the most commonly mentioned challenge, with numerous residents identifying the simple problem of being unable to “turn left” while crossing a main thoroughfare during peak summer periods. More than eight in 10 (83%) residents agree that tourism creates traffic congestion.

### Residents of Western Montana perceive that they are losing access to the outdoor recreation opportunities and amenities they cherish

When asked to give three words to describe their Western Montanan lifestyle, the most commonly used words among residents included “outdoor,” “nature,” “peace,” and “recreate.” The connection to the outdoors and appetite for outdoor recreation is an essential part of the Montana lifestyle. However, community members indicated that their access to outdoor recreation has become restricted in the past couple of years, as increasing visitor and resident populations overload capacity at local campground facilities, parks and trails.

### Workforce shortages in a time of increasing demand are impacting local businesses and the visitor experience

The pandemic caused a major disruption in America’s labor force—something many have referred to as The Great Resignation or The Great Reshuffle. In Montana, these workforce shortages have been exacerbated both by a rapidly expanding visitor economy and climbing resident population. These twin forces have placed steep upward pressure on housing supply and prices, putting a home purchase and even rent beyond the reach of many Montanans’ earnings. Many workers can’t afford to live in or near communities with jobs to fill, while local retailers, restaurants and lodgings are challenged to maintain customer service and, at times, even keep the doors open. Without a deliberate strategy to provide businesses with an adequate and well-trained workforce, constraints are likely to continue, posing a severe threat to Western Montana’s ability to generate commerce.



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## OUR VISION

Glacier Country Tourism will be the leading destination steward of our region's cultural heritage and natural environment, balancing the quality of life of our residents with the quality of our visitor experiences.

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## OUR MISSION

Glacier Country Tourism partners with our Western Montana communities to welcome visitors and support livelihoods while protecting quality of life, our extraordinary outdoor resources, and who we are.



## STRATEGIC PILLARS

The core deliverable for the Destination Stewardship Plan is a new strategic framework with five high-level goals and actionable initiatives for each to accomplish the vision for Glacier Country Tourism. The goals are interdependent and designed to collectively optimize the year-round economy and enhance the local community character and cultural DNA. All of the strategies are the result of extensive community input collected during the many individual consultations and group sessions conducted specifically for this plan.

1. BE AN ADVOCATE FOR WESTERN MONTANANS

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2. ENCOURAGE RESPONSIBLE TOURISM AND RECREATION

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3. ENHANCE EXPERIENCES IN RURAL COMMUNITIES

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4. SHAPE DEMAND AND DISPERSE VISITORS

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5. FOSTER STRONGER STAKEHOLDER ALIGNMENT AND COLLABORATION

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# BE AN ADVOCATE FOR WESTERN MONTANA

## WHAT IT MEANS

By its nature, a destination stewardship plan recognizes that tourism involves the destination as a whole. It takes into account not only the interests of visitors and tourism-based businesses, but also its ecosystems, natural resources, cultural assets and traditions, communities, aesthetics, and built infrastructure. Very importantly, it considers the interests and desires of the people who live there. The challenges facing tourism today are complex and often exist outside a destination's direct control. It will take a collaborative effort to steward tourism in Glacier Country, with equal participation by the government, private sector, and the community. It is incumbent upon tourism leaders to be advocates for their communities and work collaboratively to solve issues that impact both the visitor experience and quality of life for residents.

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## WHAT IT MEANS FOR OUR DESTINATION

Twenty years ago, the challenges facing the tourism industry generally could be solved simply by engaging local tourism stakeholders. Oftentimes, plans focused on ways to attract ever more visitors and make the destination more appealing for them. This is no longer the case. Systemic issues, such as lack of housing, aging infrastructure and workforce shortages, require wider collaborations to build effective solutions.

Glacier Country Tourism must expand its role to be not only an advocate for the tourism industry, but also to be an advocate for the communities it represents. No one is naive enough to believe that Glacier Country Tourism and its partners alone can solve issues such as workforce housing or expansion of infrastructure. These issues fall outside of the organization's mandate and area of expertise. But Glacier Country Tourism can share an informed voice to carry concerns and potential solutions to those who are equipped with the right resources and authority. And the organization can amplify the efforts of experts working toward solutions, share best practices with partners and ensure the visitor economy is considered as solutions are developed.

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## HOW IT WILL BE ACHIEVED

- + Hire community engagement director(s) to engage with residents and local community organizations, and advocate for the interests of all parties
- + Establish regularly scheduled community forums and other live and digital programming to provide more transparent and effective communication between industry stakeholders and residents
- + Develop a more expansive resident sentiment survey program that tracks sentiment on the visitor economy and community issues, and publish the results on a regular basis for ongoing conversation
- + Build industry engagement with organizations and networks responsible for planning and policy decision-making that impacts the visitor economy
- + Convene experts in areas such as housing, transportation, workforce, etc. with stakeholders in the tourism industry to share strategies, best practices, and the perspectives of the visitor economy
- + Advocate at state and federal levels to address community issues related to the visitor economy, such as supporting ways to alleviate visitor pressures on gateway cities.
- + Gather and share data and information related to the visitor economy that may be utilized in addressing the issues above, i.e., short-term rental data, visitor flow data, etc.
- + Develop community-wide programs to increase awareness and support of tourism and hospitality as a key economic driver that provides growth opportunities for all locals and small businesses

# ENCOURAGE RESPONSIBLE TOURISM AND RECREATION

## WHAT IT MEANS

Overcrowding or irresponsible visitor behavior can damage natural or cultural resources that define a destination and negatively impact the quality of life for residents, leading to pushback against tourism.

Responsible tourism and recreation focus on a collaborative approach for growing the value of tourism in a way that makes better places for people to live and visit. They maximize the positive benefits of tourism for everyone, including host communities and the environment, while mitigating the potential negative impacts of tourism.

Responsible tourism has a wide range of benefits: providing all visitors with enriching and memorable quality experiences; building business resilience and supporting their success; and benefiting and enhancing communities and the environment.

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## WHAT IT MEANS FOR OUR DESTINATION

When community members raised concerns related to tourism, it was often the behavior of certain visitors that was mentioned more so than the volume of visitors in their communities. This is likely why residents overwhelmingly selected “visitors who are respectful of the people who live here” and “visitors who care about protecting our natural resources” as the types of visitors that Glacier Country Tourism should focus on attracting.

In recent years, Montana public and private stakeholders involved in tourism, land management and conservation have come together to create a Recreate Responsibly in Montana Initiative. Organizations, businesses and agencies that most frequently interact with visitors across the state are working together to help visitors and residents alike be good stewards of Montana’s people, culture and land.

Ensuring this message gets across to visitors and residents requires an “all hands on deck” approach. This means increasing the number of partners sharing the Recreate Responsibly messaging and ensuring it reaches visitors at every touch point during their journey.

In addition to sharing responsible tourism messaging, Glacier Country Tourism and its partners must also ensure the tourism industry is offering visitors the types of experiences and opportunities that allow them to have a positive impact on local communities.







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#### HOW IT WILL BE ACHIEVED

- + Encourage more businesses to take part in the Montana Recreate Responsibly Business Partner program and encourage responsible tourism throughout the customer journey
- + Develop content strategies to deliver Recreate Responsibly messaging in the various channels where visitors are consuming content
- + Develop a Glacier Country Ambassador program to provide visitor-facing workers and residents with the knowledge, tools and resources they need to be ambassadors for responsible tourism in the region
- + Actively highlight organizations that embrace sustainable and regenerative practices throughout their business
- + Work with partners to develop experiences offering visitors the chance to “give back;” possibilities include creating “voluntourism” opportunities or incentivizing responsible visitor behavior with discounted or exclusive experiences
- + Work with partners to develop “how-to guides,” outlining practical ways for partners to integrate destination stewardship principles into their own organizations

# ENHANCE EXPERIENCES IN RURAL COMMUNITIES

## WHAT IT MEANS

Among the chief benefits of tourism is its ability to support experiences that make life better for residents. Few of the craft breweries and distilleries, local restaurants, ski resorts, music venues, and locally owned shops across Glacier Country could exist without visitor dollars. In public town hall meetings, some of these business owners said tourism accounted for as much as 80% of their annual revenues. Because of visitors, these amenities are available for residents to enjoy, too. When quality visitor experiences are intertwined with positive resident experiences, tourism is a benefit to the destinations that host it.

Good tourism management practices and careful planning are the key. In the past, destination development has focused on creating desirable destinations for travelers. Its purpose was to bolster the supply side of tourism, by providing compelling experiences, quality infrastructure, and remarkable services to inspire visitation and entice repeat visitation. The goal was to build tourism capacity, increase market demand, develop new products, and improve the positive socio-economic outcomes from all tourism activity.

The objective of destination development is to improve the enabling environment for tourism development, build tourism capacity, increase market demand, develop new products and improve the positive socio-economic and sustainability outcomes from all tourism activities.

For organizations that value destination stewardship, the focus must shift. As they deploy strategies to increase a destination's appeal for visitors, diversify local economies and build their partners' know-how, they must be mindful of building tourism in ways that benefit communities and address potential impacts.

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## WHAT IT MEANS FOR OUR DESTINATION

While some areas of Western Montana have too many visitors during peak summer months, other parts of the region crave more of the economic and social benefits of tourism. However, before Glacier Country Tourism can develop strategies to drive visitors to these mostly rural areas, community and industry stakeholders must partner to develop optimal conditions for tourism. In creating new tourism experiences—whether a new attraction or event—it is important to consider potential impacts on the community and its residents. Ideally, new tourism experiences should be shaped with attention to the capacity of local infrastructure and to attract visitors inclined to share care for the local way of life and natural resources.

Concentrating destination development strategies on the best opportunities for attracting “high yield, low impact” visitors will be critical to delivering value to these communities and ensuring alignment with the Glacier Country brand. During the town hall sessions, participants identified many ways rural communities could achieve greater benefits from tourism, whether through development of outdoor recreation, culinary and agritourism opportunities, bicycle tourism or cultural heritage tourism. Many also saw opportunities for tribal organizations to take a leading role in sharing their culture and approach to stewardship with Glacier Country visitors.

Maximizing these opportunities, especially for communities typically considered as “drive-through destinations,” will require thoughtful consideration. Potential barriers to be addressed include workforce shortages, infrastructure enhancement, lack of accommodations, transportation and mobility.

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## HOW IT WILL BE ACHIEVED

- + Partner with local stakeholders to develop destination development plans that pull together planning, policy, and capacity-building efforts
- + Advocate at the state and federal levels for infrastructure enhancements necessary to grow tourism capacity and reduce traffic congestion
- + Advocate for funding mechanisms, such as the resort tax, that harness tourism to drive public revenues for infrastructure and capacity development
- + Gather and share data and information related to the visitor economy that may be used in advocating for better transportation links throughout the region
- + Assist community stakeholders in grant writing through training, workshops and potentially retaining the services of a person with grant writing expertise
- + Engage in public-private partnerships to enhance workforce development initiatives revolving around housing, transportation and child care
- + Gather and share data and information related to the visitor economy that may be utilized in attracting investment in lodging and accommodations
- + Convene experts in areas such as outdoor recreation, trail development, agritourism, arts and culture, culinary, etc. with local stakeholders to assist in the development and implementation of destination development plans



# SHAPE DEMAND AND DISPERSE VISITORS

## WHAT IT MEANS

Tourism should benefit all areas of a community or region, not just some. To more evenly distribute the benefits of tourism, leading destinations are focusing on driving visitors beyond gateway destinations and dispersing them to more geographic areas, as well as driving demand in off-peak seasons to provide economic continuity and ensure the viability of their visitor economies.

According to a recent study from Booking.com, 64% of travelers revealed they would avoid popular tourist destinations and attractions to ensure a more even dispersal of the impact and benefits of their visit. Almost a third (31%) would even be willing to choose an alternative to their preferred destination to help avoid overcrowding.

MMGY's recent Portrait of American Travelers® study revealed that 60% of active leisure travelers agree that tourism overcrowding will influence which destinations they will visit in the next five to 10 years. In addition, 42% of travelers indicated they are willing to visit a destination in the off season in order to reduce overcrowding.

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## WHAT IT MEANS FOR OUR DESTINATION

Glacier Country is an immense geographic region with an incredible diversity of tourism assets and local needs related to the visitor economy. The impacts of tourism, both positive and negative, have been unevenly distributed in Western Montana. Two counties, Missoula and Flathead, account for the overwhelming majority of visitor stays. In addition to growing capacity in rural communities throughout the region, Glacier Country Tourism and its partners must work to shape visitor demand and disperse visitors more evenly across the region. This need for dispersion applies seasonally as well. The vast majority of visitors to Glacier Country come to the region in the peak summer months.

This seasonal and geographic clustering of visitors creates challenges for the region not only in terms of overcrowding during the peak season, but adds to challenges such as workforce and broader economic development that extend throughout the year.

As stewards of Western Montana's visitor economy, Glacier Country Tourism has the responsibility to provide tools to help local destination partners understand and measure the drivers of their visitation and shape it toward their desired future. This means leveling out the visitor economy both seasonally and geographically, and increasing in-state overnight visitation to provide a more consistent and lucrative economic pipeline for local businesses and workforce.

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## HOW IT WILL BE ACHIEVED

- + Grow the domestic tourism market by creating and promoting more "off-the-beaten-path" destinations and experiences for Montana travelers
- + Identify and incentivize event and festival opportunities to drive shoulder season visitation
- + Identify and prioritize "high yield, low impact" travelers who are more likely to leave a larger economic impact, come during shoulder season and travel beyond iconic destinations
- + Support the development and implementation of a referral program where businesses are incentivized to refer customers to other local businesses
- + Continue to invest in data management platforms to monitor visitor flows and carrying capacities

# FOSTER STRONGER STAKEHOLDER ALIGNMENT AND COLLABORATION

## WHAT IT MEANS

Destinations of all sizes are more competitive in the global visitor economy when government, community and industry priorities are aligned as much as possible. A whole-of-destination approach, where the public, private and civic sectors are all speaking to each other, creates stronger communities that elevate the visitor experience, supports sustainable and economic development across all sectors, and improves the quality of life for residents.

Every destination is made up of interconnected networks and complex systems. A visitor will encounter and patronize many of those, spanning a range of industry stakeholders, community organizations and events, small businesses, and all the infrastructure that connects a destination. The leisure or business traveler isn't generally aware of how they are navigating so many of these interrelated elements that make up a destination, but all of them impact and influence the visitor in some way.

Therefore, how well government, community and industry leaders work together influences how well visitors will experience the destination. It impacts where visitors travel in the region and for how long, when they go and why, how much they spend, what types of businesses they patronize, and what they share on social media, etc. It impacts why they even show up in the first place.

Because of COVID, there is now much greater awareness of how and why governments, community organizations and the tourism industry are all linked. And, furthermore, the pandemic showed how they all share many like-minded goals for each of their audiences related to community and neighborhood development, equitable workforce development, small business and priority sector growth, etc.

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## WHAT IT MEANS FOR OUR DESTINATION

Guided by this plan for the advancement of our destination, Glacier Country Tourism will continue its work of uniting the industry and advancing our collective goals, leading to countless benefits for residents and visitors, including infrastructure development, job creation, economic spending, major event attraction and accessibility to grassroots sporting and cultural events.

By fostering stakeholder alignment and collaboration, the region will strengthen and grow for the betterment of both our residents and visitors. This also means supporting our partners as they advance their work. We will continue to provide leadership to the industry through leveraging effective partnerships, communicating relevant and timely information and sharing useful research insights. We will also advance our efforts through educational programs and supporting skill and product development within our industry and region.

Ultimately, the success of this strategy will come from meaningful, mutually beneficial participation and alliances with our stakeholders and industry partners. By working together, we will achieve more for the benefit of our residents and visitors to our region.

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## HOW IT WILL BE ACHIEVED

- + Continue to advocate for regional cooperation to create a seamless visitor experience and share a “rising tide lifts all boats” mentality across the region
- + Develop and promote training programs for stakeholders to strengthen alignment and positioning of the region
- + Continue to invest in data management platforms and share information with partners and stakeholders to inform local strategies
- + Enhance and promote awareness of hospitality culture training programs in collaboration with local educational institutions and industry partners
- + Enhance and develop avenues for citizens to engage with Glacier Country Tourism so they are informed, feel heard, and become involved and collaborate to find solutions
- + Develop resources for businesses owned by tribal members, people of color, LGBTQ+, women and other underrepresented groups to remove systemic barriers and provide access and opportunity to benefit from the region’s visitor economy



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## NEXT STEPS

Throughout the planning process, our communities demonstrated an overwhelming willingness to come together and develop a shared vision for Glacier Country's visitor economy. That collaborative spirit will be needed once again as we aim to bring this vision to life. No single individual or organization will be able to implement this plan alone. It will require the support of a broad reaching group of contributors and a collaborative mindset.

Glacier Country Tourism will champion this strategy, at times leading initiatives, at times supporting others in their pursuits and at all times advocating for the strategic development of our visitor economy for the benefit of residents and visitors.

When appropriate, project teams will be recruited and tasked with developing strategic initiatives and collaborative metrics, guiding and aiding implementation, reviewing success measures and ensuring the lasting relevance of the work.

Many of the strategic initiatives resulting from this plan will be incorporated into Glacier Country Tourism's strategic plans, ensuring the work plan becomes a natural part of the organization's values and operations, not a one-time activity.





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