

# Montana State Legislature

**2013 Session**

## **Exhibit: 2**

**This exhibit is several booklet & pamphlets that cannot be scanned in its entirety therefore only a copy of the front page and the table of contents have been scanned to aid you in your research.**

**The original exhibits are on file at the Montana Historical Society and may be viewed there.**

**Montana Historical Society  
Archives  
225 N. Roberts  
Helena MT 59620-1201  
2013 Legislative Scanner Susie Hamilton**

Exhibit 2

1/17/2013

EXHIBIT 2

DATE 01/21/13

HB 2

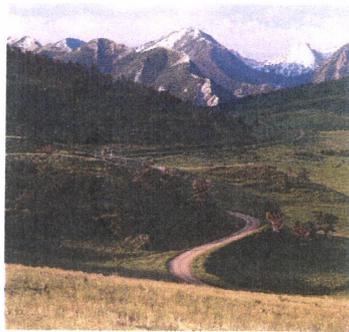


# JOINT APPROPRIATIONS SUB-COMMITTEE ON GENERAL GOVERNMENT

Presented by

Jeri Duran, Division Administrator  
Montana Promotion Division

January 21, 2013



MONTANA

Promotion Division, Department of Commerce • January 2013

## MONTANA PROMOTION DIVISION MISSION STATEMENT...

Our mission is to strengthen Montana's economy through the promotion of the state as a vacation destination and film location.

By maximizing the combined talents and abilities of its staff and with guidance from the Governor's Tourism Advisory Council, the Montana Promotion Division strives to promote a quality experience to visitors while encouraging preservation of Montana's environment and quality of life.

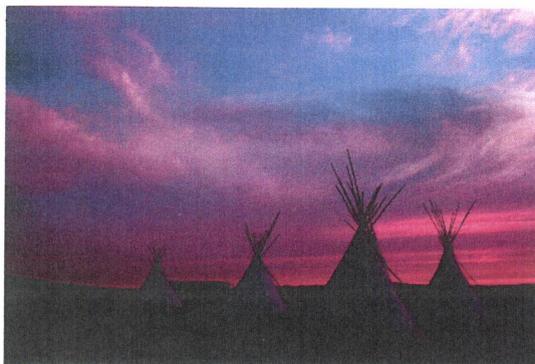
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## 2012 TOURISM INDUSTRY FACTS

(preliminary)

- 10.9 Million Non-Resident Visitors
- \$3.2 Billion in Non-Resident Expenditures



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### WHERE DID THE \$3.2 BILLION GET SPENT?

- 36% Gas/Oil \_\_\_\_\_ \$1,163.2 million
- 19% Restaurant/Bar \_\_\_\_\_ \$ 607.8 million
- 19% Retail Sales \_\_\_\_\_ \$ 601.1 million
- 12% Lodging \_\_\_\_\_ \$ 381.7 million
- 8% Groceries \_\_\_\_\_ \$ 258.8 million
- 3% Auto Rental/Repairs \_\_\_\_\_ \$ 72.8 million
- 2% Licenses, Entrance Fees \_\_\_\_\_ \$ 37.0 million
- 1% Outfitters/Guides \_\_\_\_\_ \$ 29.7 million
- <1% Other \_\_\_\_\_ \$ 17.2 million
  - *(Includes Miscellaneous Services, Transportation Fees, Gambling and Farmers Market)*

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## VISITOR EXPENDITURES CREATE JOBS

- Tourism supports 41,070 Montana jobs
- These jobs generate \$1.2 million in personal income
- Visitor spending generated \$294 million in state & local taxes



## THE EFFECT RIPPLES THROUGH YOUR COMMUNITY

- Each Montana household saves \$690 in taxes annually
- The tourism industry spends money on legal and professional services, utilities, insurance, entertainment, food and beverage, automotive and much more.

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## REASONS FOR TOURISM SUCCESS

- **Statutory Appropriation**
  - The Montana Promotion Division is primarily funded by the statutorily appropriated lodging facility use tax. Montana Promotion Division responsibilities are mandated primarily in Title 15, Chapter 65, and Title 2, Chapter 15, MCA.
  - Stable funding source allows for long term strategic planning and execution to market Montana effectively as a tourism destination and a film location

### MONTANA'S TOURISM FUNDING

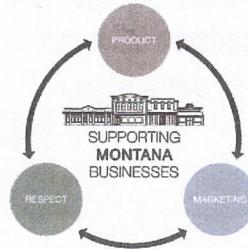
In 1987, Montana's legislature recognized the vast importance of tourism to Montana's future economy. During that session, the legislature created a 4% Lodging Facility Use Tax, commonly referred to today as the "bed tax." Lodging facilities (such as hotels, motels, bed & breakfast inns, guest ranches, resorts and campgrounds) collect this tax from guests. In turn, these funds are directed to the various entities shown below. Importantly, no additional money for tourism funding comes from Montana's general fund. In 2003, an additional 3% Lodging Facilities Sales Tax was added to the existing 4% and is deposited directly into the state general fund. In FY12, the general fund received \$15,805,496 through this additional 3% sales tax.

<b>Total Projected 7% Lodging Tax Revenue FY13</b>	<b>\$40,389,000*</b>
<b>Disbursements of Revenue</b>	
3% Lodging Facility Sales Tax Revenue - (100% TO GENERAL FUND)	\$17,399,000
4% Lodging Facilities Use Tax Revenue	\$23,000,000
Montana Heritage Commission <small>(Virginia City, Missoula City)</small>	(\$400,000)
Department of Revenue <small>(Chickadee County)</small>	(\$136,000)
<b>Available for Distribution (according to percentages established in statute)</b>	<b>\$22,544,000</b>
<b>State Parks - 6.5%</b> <small>(Capital Park &amp; Maintenance)</small>	<b>\$1,465,360</b>
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<b>Historical Interpretation - 2.6%</b>	<b>\$586,144</b>
<b>Regions/CVBs Marketing - 22.6%</b>	<b>\$5,072,400</b>
<b>Department of Commerce Programs - 64.9%</b> <small>Montana Promotion Division (Montana's Office of Tourism - 40.1%)</small>	<b>\$14,631,066</b>

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## REASONS FOR TOURISM SUCCESS

- **Strategic Plan**
  - Over 300 individuals involved in the tourism industry have contributed to the Five Year Strategic Plan for Tourism and Recreation to be released in March.



**PRODUCT**  
Differentiate through research, education and award-winning programs to improve the visitor experience and help our partners create demand for the Montana brand.

**MARKETING**  
Differentiate the Montana experience from all other competing destinations through innovative marketing and promotion.

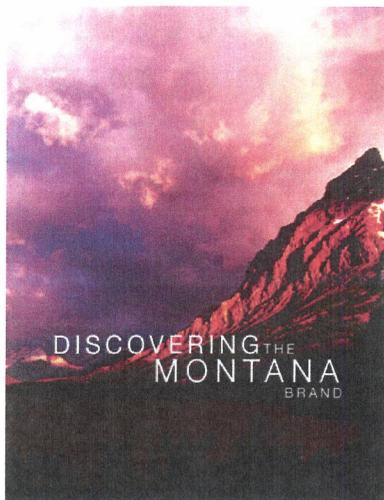
**RESPECT**  
Encourage visitors and build recognition for the products of tourism as a vital economic development engine.

## THE MONTANA VISION

TO BE THE MOST VISITED AND MOST ENJOYED DESTINATION IN THE LOWER 48 STATES AND TO BE THE MOST VISITED AND MOST ENJOYED DESTINATION IN THE LOWER 48 STATES.

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## REASONS FOR TOURISM SUCCESS



The Montana Brand has proved to be an effective tool in marketing to our target audience of the Geo-Traveler as well as working with tourism partners to have a cohesive message in promoting Montana.

### BRAND PILLARS

Montana is...

- More Spectacular Unspoiled Nature... than anywhere else in the lower 48
- Vibrant & Charming Small Towns... that serve as gateways to natural wonders
- Breathtaking Experiences by Day... and relaxing hospitality at night

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## COMING TOGETHER TO EXPAND MONTANA'S TOURISM STORY WORKSHOPS...



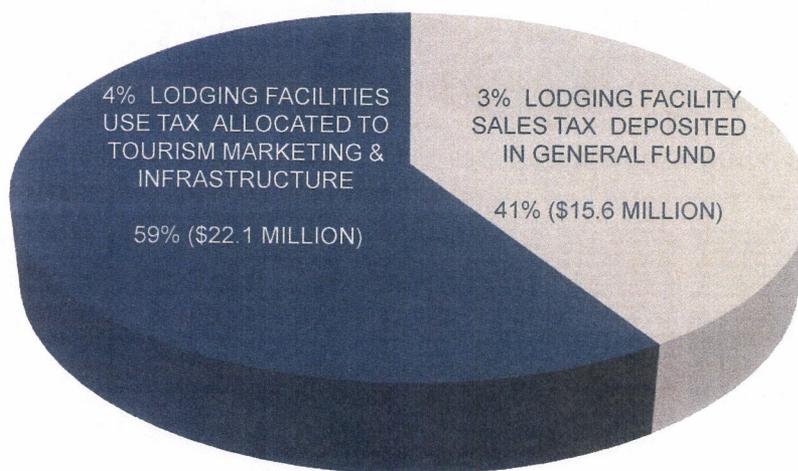
### Upcoming Workshops...

- Jan. 23, Big Sky/Yellowstone Country
- Feb. 28, Bigfork/Glacier Country
- Mar. 1, Polson/Glacier Country
- April 2, Pray/Yellowstone Country
- June 5, Red Lodge/Yellowstone Country
- June 27, Sidney/Missouri River Country

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## 7% LODGING TAX DISTRIBUTION



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## RECENT FILM OFFICE HIGHLIGHTS INCLUDE:

- **"Nebraska"**
  - Director Alexander Payne's "Nebraska" recently filmed in the Billings area.
  - Total Economic Impact: \$370,500
  
- **"Dodge"**
  - National Dodge commercial slated to air during the Super Bowl was filmed in the Livingston/Bozeman areas
  - Total Economic Impact: \$803,250
  
- **"Jimmy Picard"**
  - This independent feature film recently filmed in Browning.
  - Total Economic Impact: \$3,748,500



**DODGE**



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## National Geographic Traveler— Full Page Advertorial and Ad



### EXPANSIVE MONTANA ADVENTURES

Guided bird country of songbirds in Glacier House (Helm, Montana). Photo by Tony Spurn

Visit landscapes that range from Yellowstone to Glacier National Park. Be wowed in a powder, serene, wild expanse, hiking, mountain peaks, and brilliant blue skies. Consider to create these magical, sublime, and unforgettable memories in Montana.

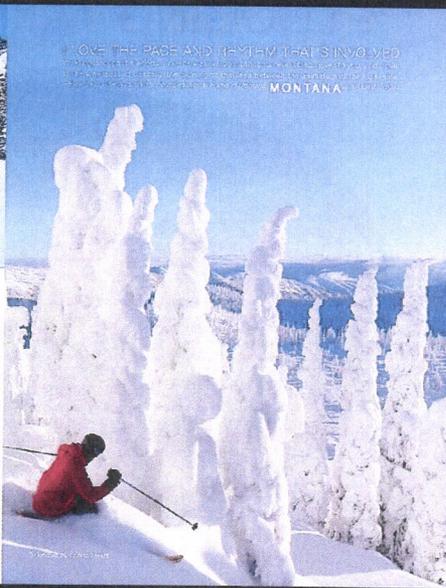


**Winter is Here**  
Experience snow so light and fluffy, you can hear your windshield wiper your face to see it. It's winter under

your feet. In town, taking the local streets of a small Montana town, you'll find a powder, serene, wild expanse, hiking, mountain peaks, and brilliant blue skies. Consider to create these magical, sublime, and unforgettable memories in Montana.

**Bigger is Better**  
Snowing in Montana, big mountains, and wide horizons make for an epic experience at all Montana's ski resorts. All areas. The only thing not to get the big, clean, powder snow is a winter vacation. It's everything for an amazing destination resort to experience. Discover the beauty of Montana's ski resorts, from snow-capped mountains, snow-covered trees, and snow-capped mountains. Experience snow so light and fluffy, you can hear your windshield wiper your face to see it. It's winter under

**Nature's Playground**  
Montana's natural beauty is a winter wonderland. A quiet, peaceful, serene, and serene, you can hear your windshield wiper your face to see it. It's winter under your feet. In town, taking the local streets of a small Montana town, you'll find a powder, serene, wild expanse, hiking, mountain peaks, and brilliant blue skies. Consider to create these magical, sublime, and unforgettable memories in Montana.



LOVE THE PACE AND RHYTHM THAT'S INVOLVED  
MONTANA

# National Geographic Traveler --MONTANA CO-OPS

## CELEBRATE WHITEFISH WINTERS

Set in a glacial valley and surrounded by hundreds of lakes and rivers, Montana's Northern Rocky Mountains, Whitefish boasts the perfect location for year-round recreation. Celebrate winter mountain life in a charming small town with big hospitality.

Hop on the SNOW Bus which takes guests to and from Whitefish Mountain Resort for a day of skiing and snowboarding. Explore the town's history via dog sled, glide across the expanded cross-country and snowshoe trails, cozy up for a warm drink in the Snow House, just 20 miles from town. Experience

the charm of the Whitefish Winter Carnival and the town's 5th Annual Snow Festival. They'll have a lot of fun together.

Moreover, visit the covered walkway on Central Avenue and explore the old town and galleries, the outdoor ice skating rink, and the historic Main Street. On an award-winning snowshoe trail, visit the town's green energy and explore the town's restaurants featuring a variety of cuisines. It's a winter wonderland.

**Easy Access**  
One of the closest mountain resorts to a major city, Whitefish is just 20 miles from town. Experience

at Glacier Park, an award-winning resort. In addition, America's Empire Builder runs the train to the town from Chicago and the historic Pioneer Chief Train Depot.

Visit [ExploreWhitefish.com](http://ExploreWhitefish.com).



Snowshoeing on a trail in Whitefish.

## CARVE IT UP IN BRIDGER BOWL

Known for its "kater-ski" snow, the lightest and fluffiest around, Bridger Bowl boasts 200 acres of terrain, 2 trails, 200 acres of terrain, and 2000 vertical feet.

A local resort, it's a beginner to expert, with 100 skiable acres. The resort is a full-service resort with a variety of amenities, including a ski school, rental shop, and a variety of dining, retail, and service options. Just 20 miles from Bozeman, it's a winter wonderland.



Skier on a trail in Bridger Bowl.

Go to [BridgerBowl.com](http://BridgerBowl.com).

**Sweet Dreams**  
4 Nights Dream 4 Days Skin  
Only \$169/night  
ALL SEASON

Bozeman, MT  
**BRIDGER BOWL**  
Go to [BridgerBowl.com](http://BridgerBowl.com).

## EVERY NOW AND THEN YOU STUMBLE UPON A TOWN THAT'S GOTTEN EVERYTHING RIGHT

GREAT COFFEE, FOOD WITH CHARACTER, SHOP OWNERS WITH PURPOSE.

**Whitefish MONTANA**

[www.ExploreWhitefish.com](http://www.ExploreWhitefish.com) 877-882-3548

## WINTERTIME IS PLAYTIME IN BOZEMAN

Go to [Bozeman.com](http://Bozeman.com).

**WIDE OPEN SPACES & DRY, LIGHT POWDER EVERYWHERE YOU TURN**

[Bozeman.com](http://Bozeman.com)

# National Geographic Traveler --MONTANA CO-OPS



## REMARKABLE YELLOWSTONE COUNTRY

Experience the beauty of Yellowstone National Park, a winter wonderland. The park is a winter wonderland, with snow-covered mountains, geysers, and hot springs. It's a winter wonderland, with snow-covered mountains, geysers, and hot springs. It's a winter wonderland, with snow-covered mountains, geysers, and hot springs.

**Alpine Skiing** Adventure seekers enjoy more than 200 miles of snow-covered, well-groomed, and out-of-the-way ski trails. Just west of town, the Snowbird Ski and Summer Resort offers a variety of ski trails, from beginner to expert. It's a winter wonderland, with snow-covered mountains, geysers, and hot springs.

**Speed It Up** Consider the thrill of snowmobiling in the areas of West Yellowstone, Cooke City, and Yellowstone National Park. There are over 500 miles of groomed trails, offering a variety of snowmobiling experiences. It's a winter wonderland, with snow-covered mountains, geysers, and hot springs.

Snowmobiling in Yellowstone National Park.

**THE ROAD TO FREEDOM SNOW IS PAVED WITH**

Go to [Yellowstone.com](http://Yellowstone.com).



# MONTANA CO-OPS – Online

tripadvisor

Montana, Shaped by Winter

15 UNDISCOVERED SAILAREAS

You work hard Now it's time to PLAY.

MONTANA SHAPED BY NATURE.

### AN INTERVIEW WITH MONTANA FLY FISHING GUIDE

**Jerry Grossbacher** is a fly fishing guide, writer, author, and radio host in Montana. He has been a guide, a backpacking guide, and a guide. He has been a guide, a backpacking guide, and a guide. He has been a guide, a backpacking guide, and a guide.

**SM:** You've rowed your boat on a lot of Montana rivers. You even guided Oprah Winfrey for her TV show. What do you consider your home water?

**JG:** I love the Yellowstone R. and to fish in any day it could take about 120 miles of it. So we're fishing something new. Since the river gets dry with the flow and the season, if you don't fish a certain section for a few days, things change by the time you get back to it and you get to enjoy it all over again.

**SM:** It's a wild river, no doubt about that, and it carries a lot of silt every year. And we've resisted the temptation to tame it with dams.

**JG:** Yeah, it's the wildest of the river and it's a lot of silt. When the dam is built, it's a lot of silt. When the dam is built, it's a lot of silt. When the dam is built, it's a lot of silt.

**SM:** Speaking of power and dynamism, tell me about your work with grizzly bears.

**JG:** I worked in Grizzly National Park and in Yellowstone doing documentary photography to figure out what they're doing and what it's doing. I did a documentary about grizzly bears in 2002. I did a documentary about grizzly bears in 2002. I did a documentary about grizzly bears in 2002.

**SM:** That had to be fascinating. But was there a take-home lesson in that report?

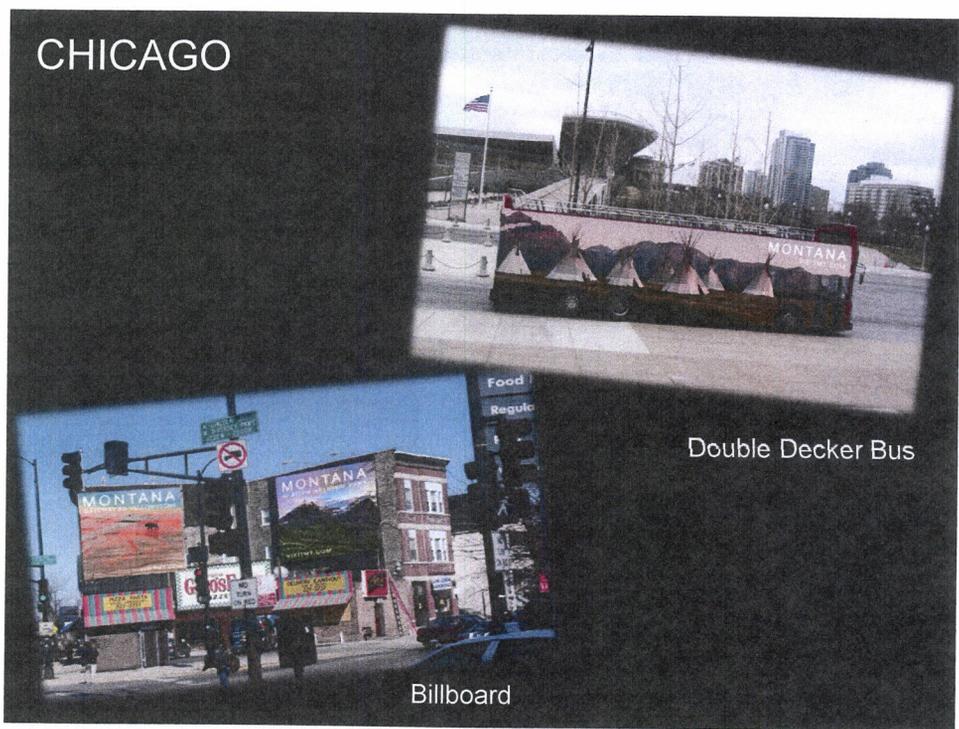
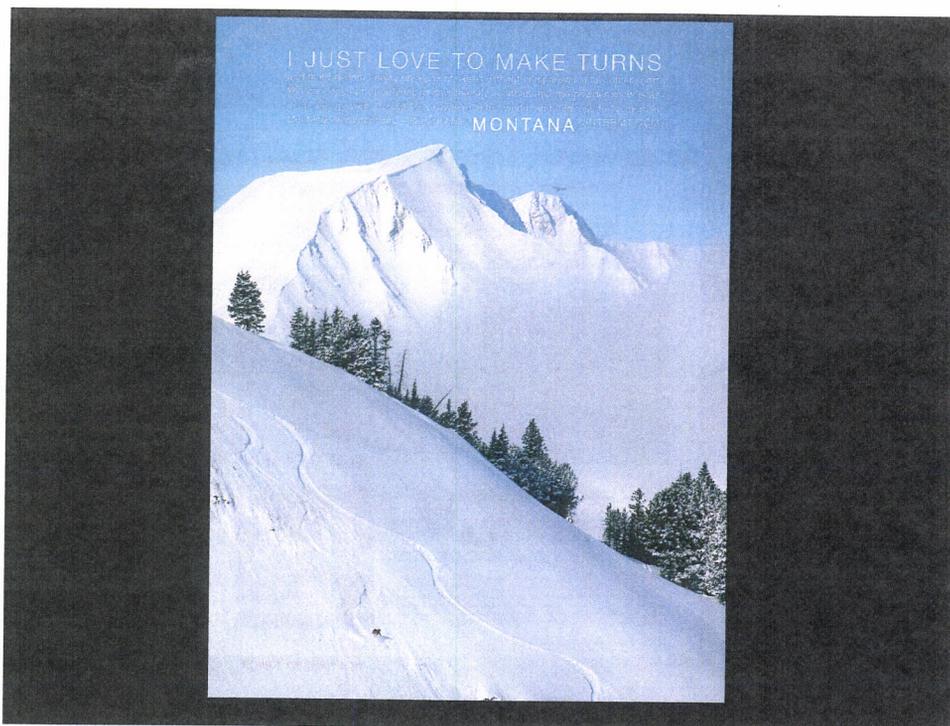
**JG:** I was very excited and I was a lot of silt. I was very excited and I was a lot of silt. I was very excited and I was a lot of silt.

**SM:** How come you're still living in Montana?

**JG:** I grew up in Texas and it was a lot of silt. I grew up in Texas and it was a lot of silt. I grew up in Texas and it was a lot of silt.

**SM:** Do you try to help your clients enjoy it as much as you do?

**JG:** I try to get them in the boat and let them be themselves. I try to get them in the boat and let them be themselves. I try to get them in the boat and let them be themselves.

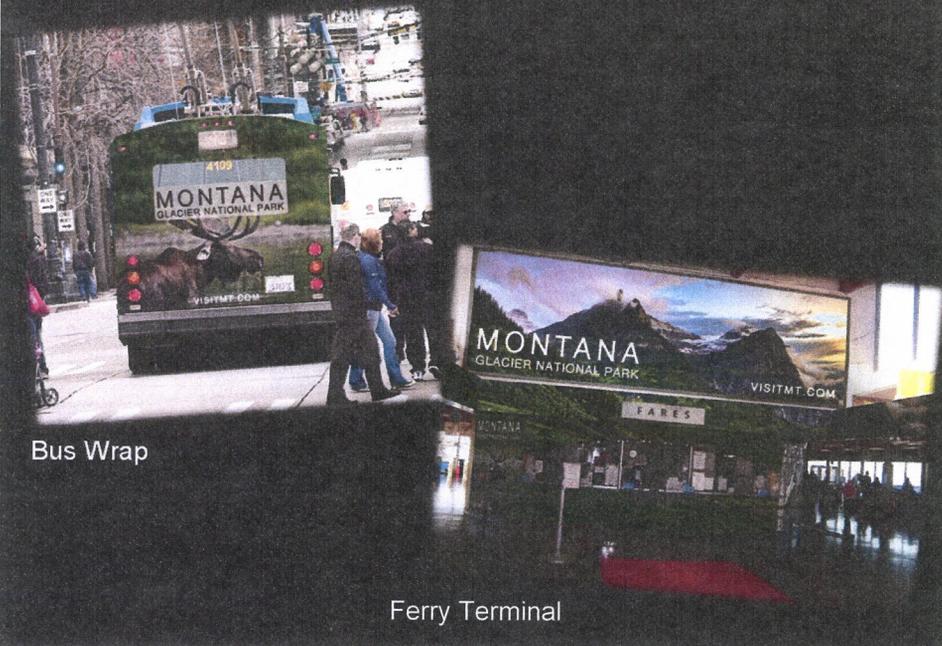


CHICAGO

Double Decker Bus

Billboard

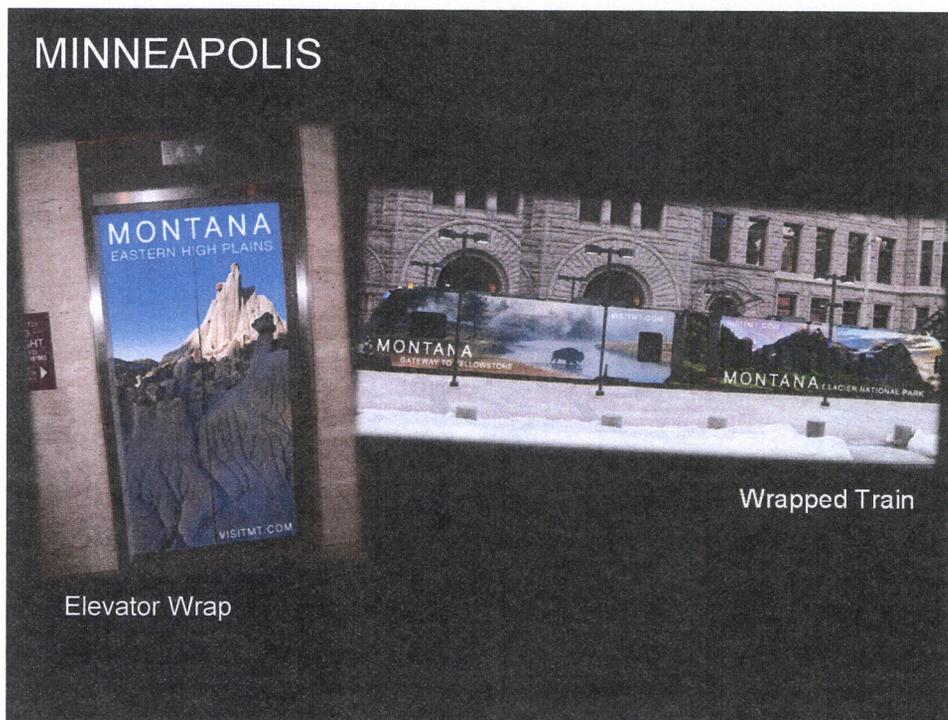
# SEATTLE



Bus Wrap

Ferry Terminal

# MINNEAPOLIS



Elevator Wrap

Wrapped Train

## TOURISM MEANS A PROVEN "RETURN ON INVESTMENT"

- Every \$1 spent on advertising placements yields \$157 in visitor spending in Montana
- In ongoing Brand Awareness Studies, it is found that once Montana advertises in a market, awareness of Montana notably grows. In addition, those that have seen Montana's advertising are significantly more likely to plan travel to Montana than those who are unaware of the advertising.



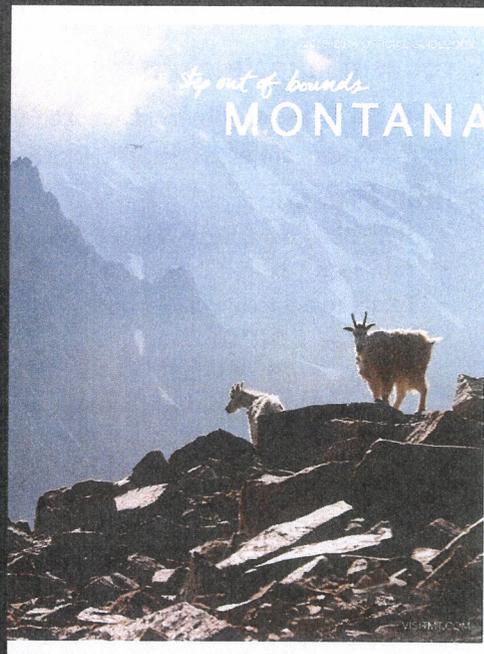
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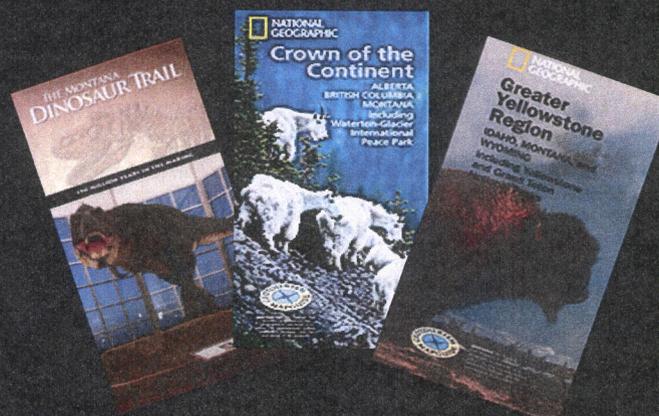
www.visitmt.com



New Guidebook  
2013-2014



Cooperative Brochures



## MONTANA PROMOTION DIVISION

### ■ Tourism Infrastructure Investment Program (TIIP)

These grants assist with the construction, improvement or expansion of non-profit owned/operated tourism facilities and attractions across the state.

1995-Present...

- 106 Tourism related projects in 50 Montana communities
- Total Bed Tax Investment: \$4.72 million
- Total Project Costs: \$47.2 million
- Leverage of \$10:\$1



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## MONTANA PROMOTION DIVISION

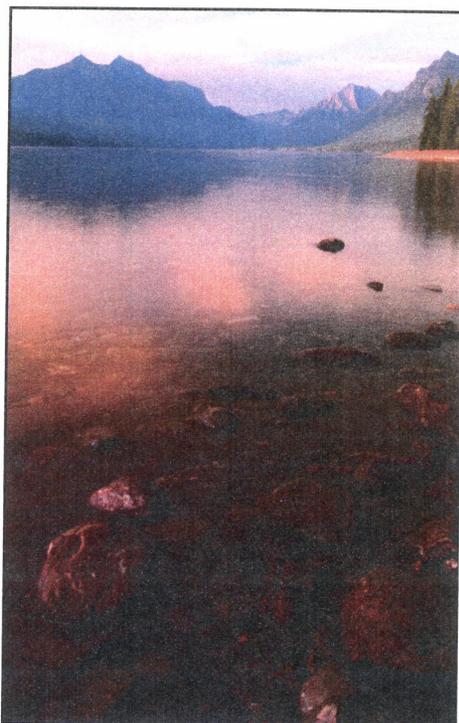
### ■ HB 2 Decision Package

#### DP- 5201 - MPD **PRIVATE FUNDS & AUDIT ADJUSTMENTS HB 2 -**

The Montana Promotion Division has historically adjusted its HB 2 **private funds** appropriation to \$750,000 for each year of the biennium. This proposal continues the historically established trend.

MONTANA

Promotion Division, Department of Commerce • January 2013



## USEFUL RESOURCES

Montana Office of Tourism

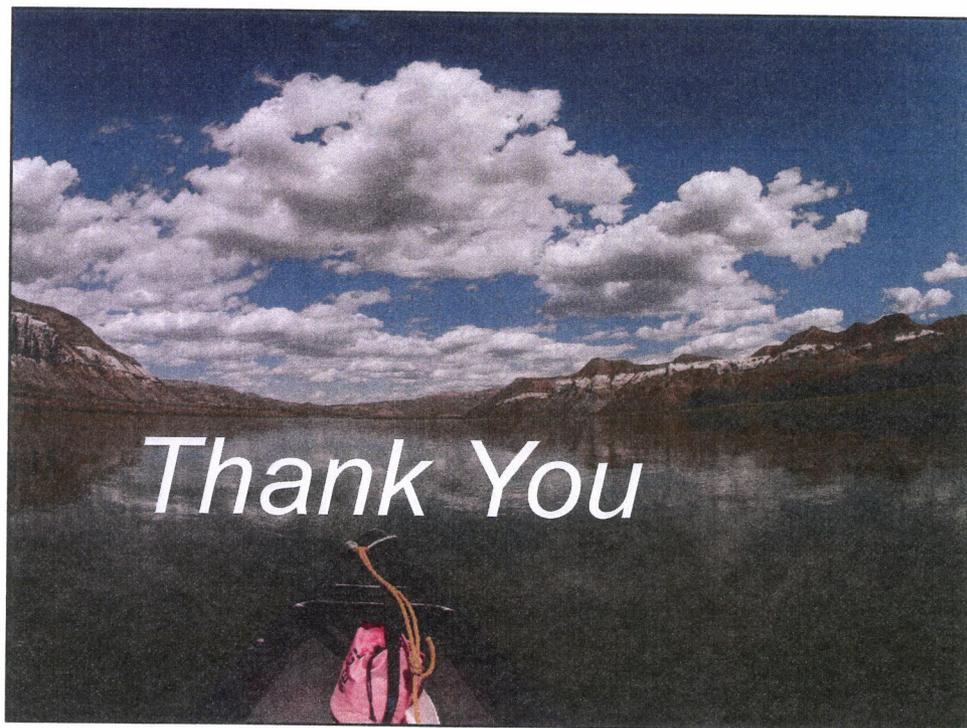
(406) 841-2870

[www.travelmontana.mt.gov](http://www.travelmontana.mt.gov)

(ITRR) Institute for  
Tourism & Recreation Research

(406) 243-5686

[www.itrr.umt.edu](http://www.itrr.umt.edu)



# MONTANA

OFFICE OF TOURISM

## MONTANA'S TOURISM & RECREATION INDUSTRY FAST FACTS

### Tourism Means Business

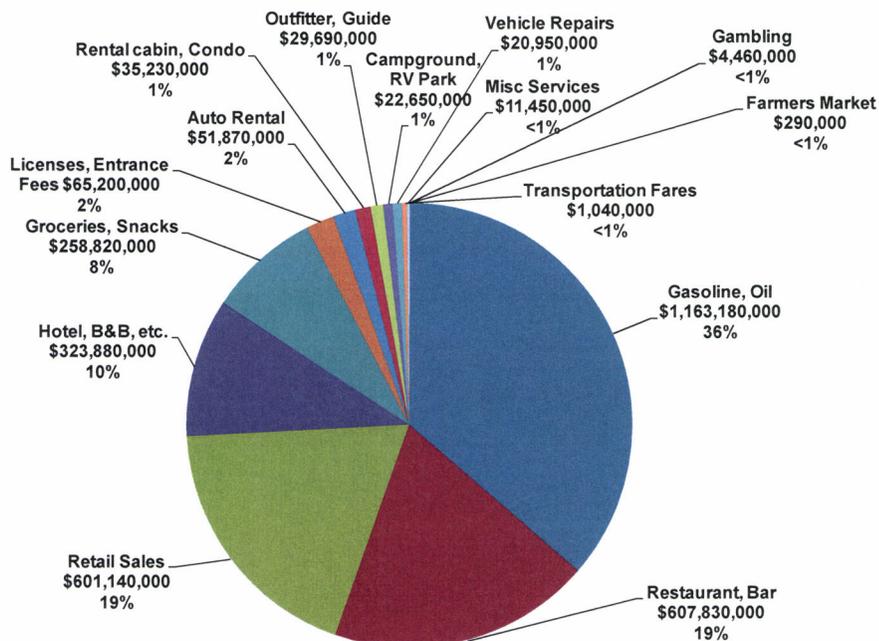
- Tourism is one of Montana's leading industries and primary revenue drivers.
- 10.9 million visitors traveled to Montana in 2012 which means 11 new customers per Montana resident for Main Street businesses.

### Tourism Means "New" Money

- Visitors to Montana in 2012 spent \$3.2 billion which is new money for Montana's economy.
- Visitor spending generated \$294 million in state and local tax revenue in 2012.
- Every dollar spent on advertising, yields \$157 in visitor spending in Montana.
- Without tourism tax revenue, it is estimated that each Montana household (avg. 2.36 ppl) would have to pay \$690 in additional local and state taxes. *(total tax revenue / total households)*

## 2012 Visitor Expenditures

(\$3.2 BILLION IN NEW MONEY)



## Tourism Means Jobs

- Tourism and recreation businesses **support 41,070 Montana jobs.**
  - One in every 15 Montana workers is supported by out-of-state travel.
- Visitor spending **provided \$1.2 billion in worker salaries.**
  - On average, **every dollar spent** by nonresident travelers in Montana **generates 38 cents (\$.38) in wage and salary income** for Montana residents. This is 57% higher than the national average.
- Some of our **Partners** in the **Tourism Industry** include:
  - Hotels, motels, bed & breakfasts and dude ranches
  - Restaurants and bars
  - Outfitters and guides
  - Ski areas and private travel attractions
  - Museums and cultural facilities
  - Private and public campgrounds
  - Farmers and ranchers
  - Gas station and convenience store owners
  - Transportation companies
  - Retail shops
  - State and federal agencies
- **Montana's 2008-2012 Tourism & Recreation Strategic Plan** incorporates input received from Montana citizens, businesses and organization representatives (including private, public, tribal, nonprofit), totaling over **1,200+ Montanans.**

## Tourism Means Competition

- Montana needs to maintain a stable funding source in order to grow market share in tourism marketing and advertising.
- In ongoing Brand Awareness Studies, it is found that once Montana advertises in a market, awareness of Montana notably grows. In addition, those that have seen Montana's advertising are **significantly more likely to plan travel** to Montana than those who are unaware of the advertising.
- Funding for tourism marketing results in increased visitor spending which in turn increases income, property and corporate tax collections.

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Figures compiled using data included in ITRR's *2012 Montana Nonresident Economic Impacts & Expenditures*; ITRR's *The Economic Review of the Travel Industry in Montana, 2012 Biennial Edition*; *Montana Tourism & Recreation Strategic Plan 2008-2012*; and *Leisure Trends Group MTOT Brand Awareness & Conversion Studies 2010-2012*.

Updated January 2013

<http://montanaturismnews.org>

<http://travelmontana.mt.gov>



# MONTANA'S TOURISM FUNDING

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**Total Projected 7% Lodging Tax Revenue FY13** **\$40,389,000**

## Disbursements of Revenue

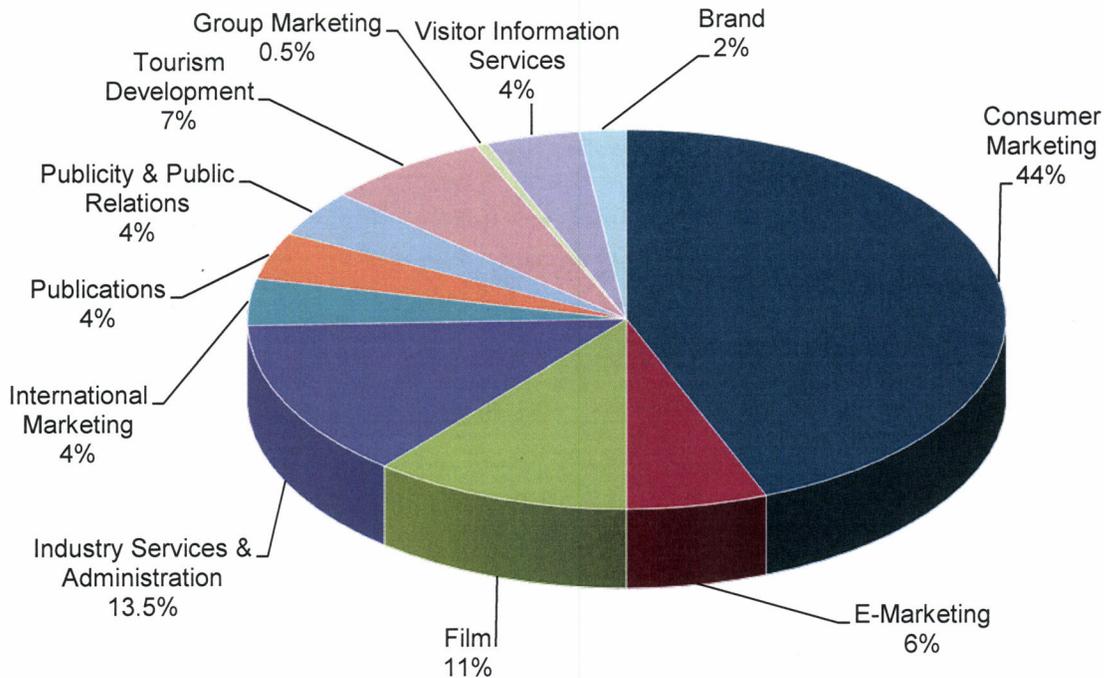
<b>3% Lodging Facility Sales Tax Revenue* (100% TO GENERAL FUND)</b>	<b>\$17,309,000</b>
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<b>Montana Heritage Commission</b> <i>(Virginia City/Nevada City)</i>	<b>(\$400,000)</b>
<b>Department of Revenue</b> <i>(Collection costs)</i>	<b>(\$136,000)</b>
<b>Available for Distribution</b> <i>(According to percentages established in statute)</i>	<b>\$22,544,000</b>

<b>State Parks - 6.5%</b> <i>(Operations &amp; Maintenance)</i>	<b>\$1,465,360</b>
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<b>Historical Society - 1%</b> <i>(Historical Sites &amp; Signage)</i>	<b>\$225,440</b>
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## Department of Commerce—Montana Promotion Division FY13

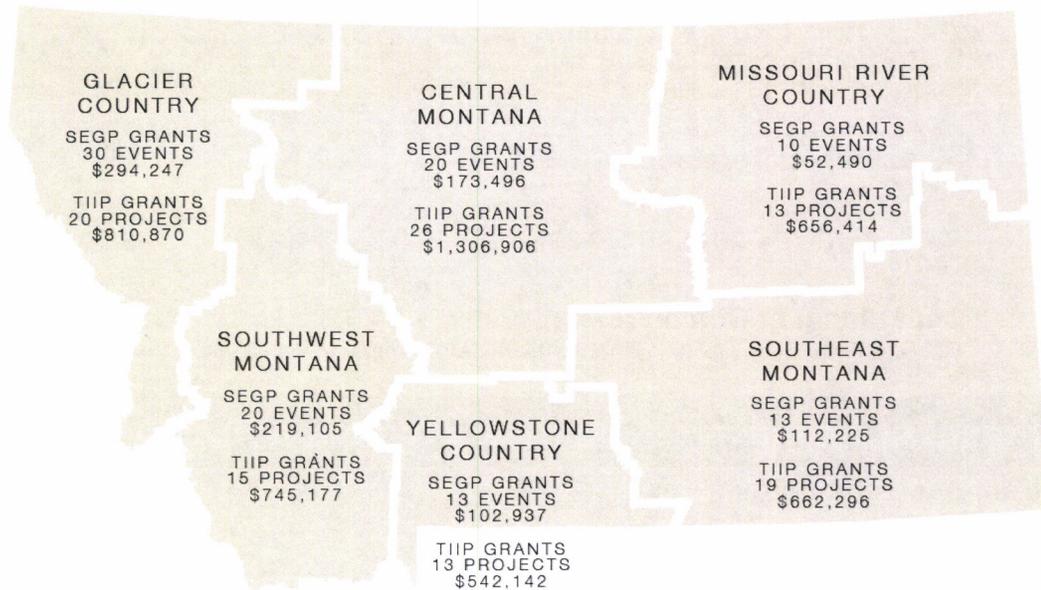
<b>Funds from Accommodations Tax</b>	<b>\$14,631,056</b>
<b>Income from Co-ops, etc. &amp; HB2</b>	<b>\$750,000</b>
<b>Projected Funds Available</b>	<b>\$15,381,056</b>

## Distribution of Montana Promotion Division Funds FY13



## Montana Promotion Division—Tourism Development Grant Awards

TIIP: Tourism Infrastructure Improvement Program  
 SEGP: Special Event Grant Program



Statewide Tourism "Bed Tax" Grants  
 TIIP (1995-2012)—\$4.725 million  
 SEGP (2003-2013)—\$954,500

The \$4.725 million in TIIP funds (1995-2012) helped create \$46.2 million in tourism facility improvements, a 10 to 1 match.

(Updated January 2013)

# MONTANA



2011-2012

## Office of Tourism FY12 Annual Report Montana Department of Commerce

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TOURISM DEVELOPMENT  
& EDUCATION

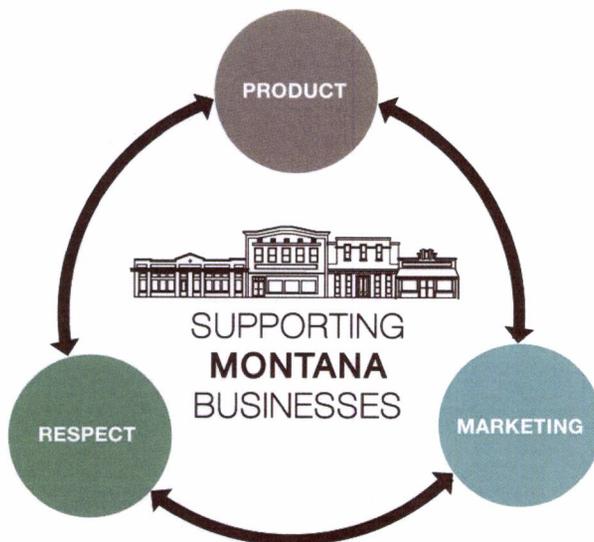
MONTANA FILM OFFICE

MONTANA'S TOURISM PARTNERS

## FY12 ANNUAL REPORT

# THE MONTANA VISION

The Montana Vision is to increase visitation and improve the visitor experience while preserving Montana community values and protecting its unique places. The Montana Office of Tourism strives to achieve its guiding principles by focusing on the supporting pillars of Montana businesses via product, marketing and respect.



## PRODUCT

*Collaborate through outreach, education and novel value-add programs to improve the visitor experience and help our partners better deliver on the Montana Brand.*

## MARKETING

*Differentiate the Montana experience from all other competing destinations through new consumer marketing and PR initiatives.*

## RESPECT

*Improve awareness and build recognition for the potential of tourism as a robust economic development engine.*

Jeri Duran | Administrator  
Carmen Levick | Executive Assistant

## MARKETING

Katy Peterson | Bureau Chief  
Susan Buhr | Marketing Coordinator  
Bev Clancey | Publications Manager  
Riana Davidson | Social Media Coordinator  
Norm Dwyer | Web Designer  
Thurston Elfstrom | Digital Marketing Manager  
Carl Haller | Network Administrator  
Deb Knudson | Administrative Assistant  
Sarah Lawlor | Public Relations Manager  
Donnie Sexton | Public Relations/Staff Photographer  
Jan Wirak | Web Content Specialist

## SALES AND CONSTITUENT SERVICES

Pam Gosink | Bureau Chief  
Victor Bjornberg | Tourism Development & Education Manager  
Carol Crockett | Visitor Information Services Manager  
Marlee Iverson | Travel Trade Manager  
Julie Walker | Program Assistant

## INDUSTRY & OPERATIONS SERVICES

Anna Marie Moe | Bureau Chief  
Corrie Hahn | Digital Project Coordinator  
Marchita Mays | Receptionist  
Linda Mclure | Business Operations Manager  
Jo Morand | Fulfillment & Receptionist  
Barb Sanem | Compliance Specialist  
Robert Webster | Fulfillment Specialist  
Carmen Whiting | Receptionist

## FILM OFFICE

Deny Staggs | Acting Bureau Chief/Film Location Coordinator  
Sage DuBois | Multi-Media & Project Coordinator  
VACANT | Film Office Coordinator

# MONTANA OFFICE OF TOURISM

## STAFF

## ACCOMPLISHMENTS

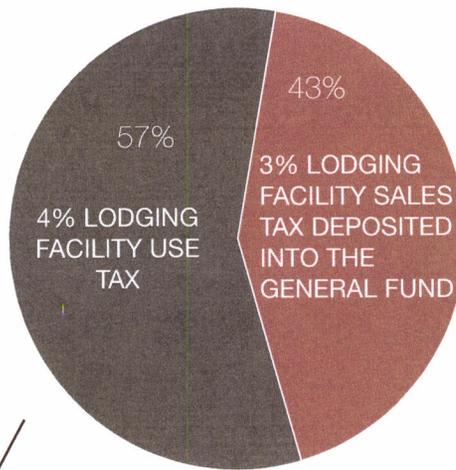
Montana hosted 10.5 million visitors in 2011, which translates to 11 new customers per Montana resident for our Main Street businesses.

Visitors to Montana spent \$2.8 billion, which is new money for Montana's economy.

Tourism and recreation businesses support 39,000 Montana jobs providing over \$896 million in workers' salaries.

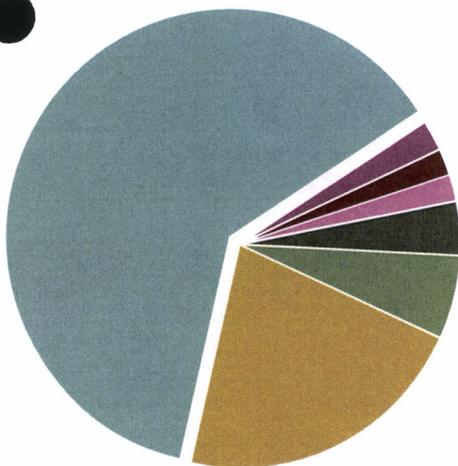
Visitor spending generated \$276 million in state and local tax revenue in 2011.

HOW THE 7% LODGING FACILITY TAX IS DISTRIBUTED

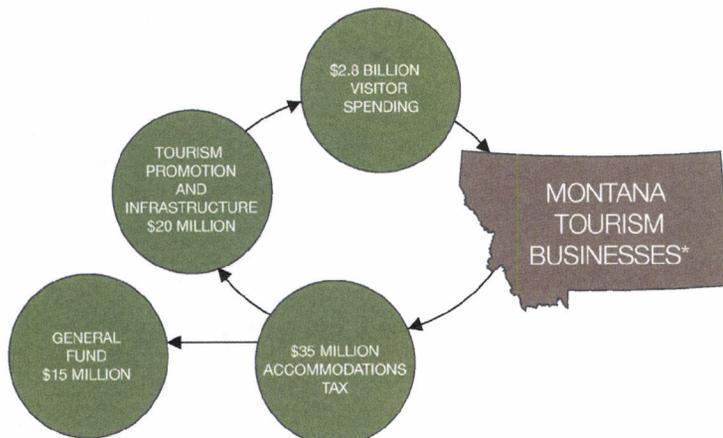


- 43% | 3% Lodging Facility Sales Tax Deposited Into General Fund
- 57% | 4% Lodging Facility Use Tax

HOW THE 4% LODGING FACILITY USE TAX IS DISTRIBUTED



- 62% MT Department of Commerce/MT Office of Tourism
- 22% Tourism Regions/CVBs
- 6% MT Fish Wildlife & Parks
- 4% MT Historical Society
- 2% MT Heritage Preservation & Development Commission
- 2% MT Department of Revenue
- 2% University of MT/ITRR Research

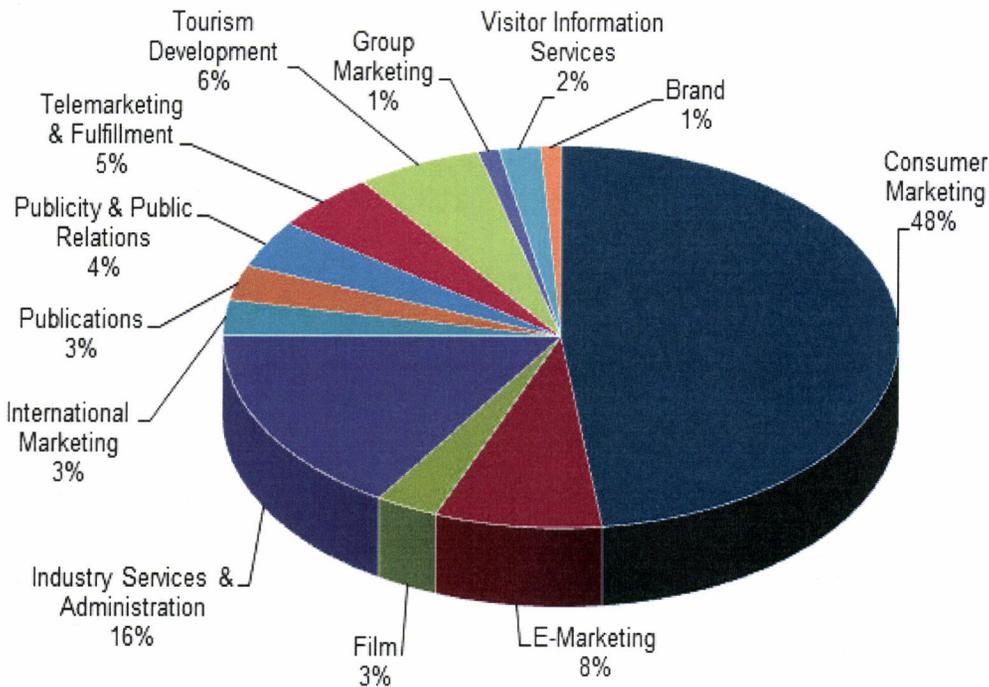


# MONTANA'S TOURISM FUNDING

*Funding for tourism promotion comes from a 4% Lodging Facility Use Tax, commonly known as the "Bed Tax." Enacted by the 1987 legislature, the tax is collected from guests of hotels, motels, bed and breakfasts, guest ranches, resorts and campgrounds. These funds are divided among the entities shown in the pie chart to the left.*

*It should be noted that no additional money for tourism funding comes from Montana's General Fund. In fact, tourism helps support the General Fund due to the additional 3% Lodging Facility Sales Tax that was added in 2003 to the original 4%. This additional 3% accounted for over \$15 million deposited directly into the General Fund in FY12 due to the success of Montana's tourism industry.*

## Distribution of Montana Office of Tourism Funds FY12



## 2011 Non-Resident Traveler Expenditures

Gasoline/Oil.....	\$947,600,000
Retail Sales.....	\$542,720,000
Restaurants/Bars.....	\$532,960,000
Hotel/B&B/etc.....	\$343,170,000
Groceries/Snacks.....	\$194,720,000
Auto Rentals/Repairs.....	\$ 75,090,000
Licenses/Entrance Fees.....	\$ 52,050,000
Outfitters/Guides.....	\$ 41,520,000
Campground/RV Park.....	\$ 19,920,000
Miscellaneous Services.....	\$ 15,970,000
Gambling.....	\$ 8,260,000
Transportation Fees.....	\$ 370,000

Total .....\$2,774,340,00

Source: Institute for Tourism & Recreation Research, [www.itrr.umt.edu](http://www.itrr.umt.edu)

# MONTANA'S TOURISM FUNDING

## ACCOMPLISHMENTS

Created advertising messages that supported Montana's image of spectacular nature and breathtaking experiences.

Targeted national and regional audiences, including Minneapolis, Seattle, Chicago and Salt Lake City.

Placed more than \$7.1 million in media, including magazine, online, radio, newspaper and out-of-home (transit, billboard, storefront) advertising.

Awarded a Gold Magellan Award from *Travel Weekly*, honoring the best in travel from design to marketing to services; a 2011 Silver Effie from Effie Worldwide, competing against HomeAway.com and Travelocity; and the "Best Overall State Tourism Marketing Campaign" award from the National Council of State Tourism Directors.

Contracted a research study on the effectiveness of 2011-2012 marketing campaigns\*:

Increased awareness of Montana as a travel destination by 73% over previous year

Travelers aware of advertising 33% more likely to travel

For every dollar spent on advertising, \$157 is spent in Montana

Developed partnerships with private and public entities to extend the advertising budget.

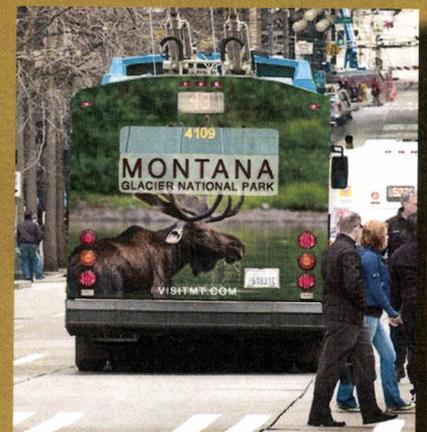
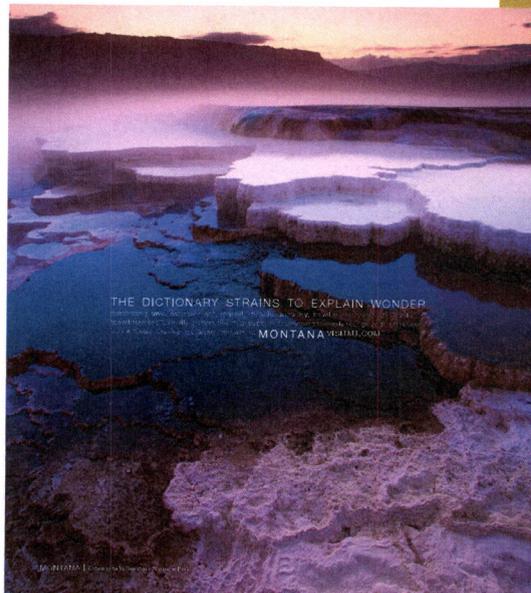
Get Lost (in Montana) partnered with local destination marketing groups and private businesses to encourage in-state travel by Montana residents.

Co-Op Marketing Program negotiated and coordinated premium placement advertising opportunities for Montana tourism partners, saving partners up to 75% off national and regional print and online media.

Sled the Rockies partnered with Wyoming and Idaho to promote snowmobiling in the northern Rockies.

## MARKETING MONTANA

*The marketing program develops advertising and promotional campaigns to positively and uniquely brand Montana, differentiate the state as a travel destination and increase tourism from domestic and Canadian travelers. Nationwide tourism trends, statistics from the Institute of Tourism and Recreation Research (ITRR) at the University of Montana and the results of contracted research studies help determine the overall marketing strategy.*



\*Source: Leisure Trends Group, 2011-2012

## ACCOMPLISHMENTS

MTOT continued to enhance and refine the user experience on GetLostMT.com, including the addition of a 'Bucket List,' which allows users to save Places To Go or Things to Do on the site. MTOT also expanded GetLostMT.com's web presence by launching a mobile version of the site, as well as native mobile apps for iPhone and Android.

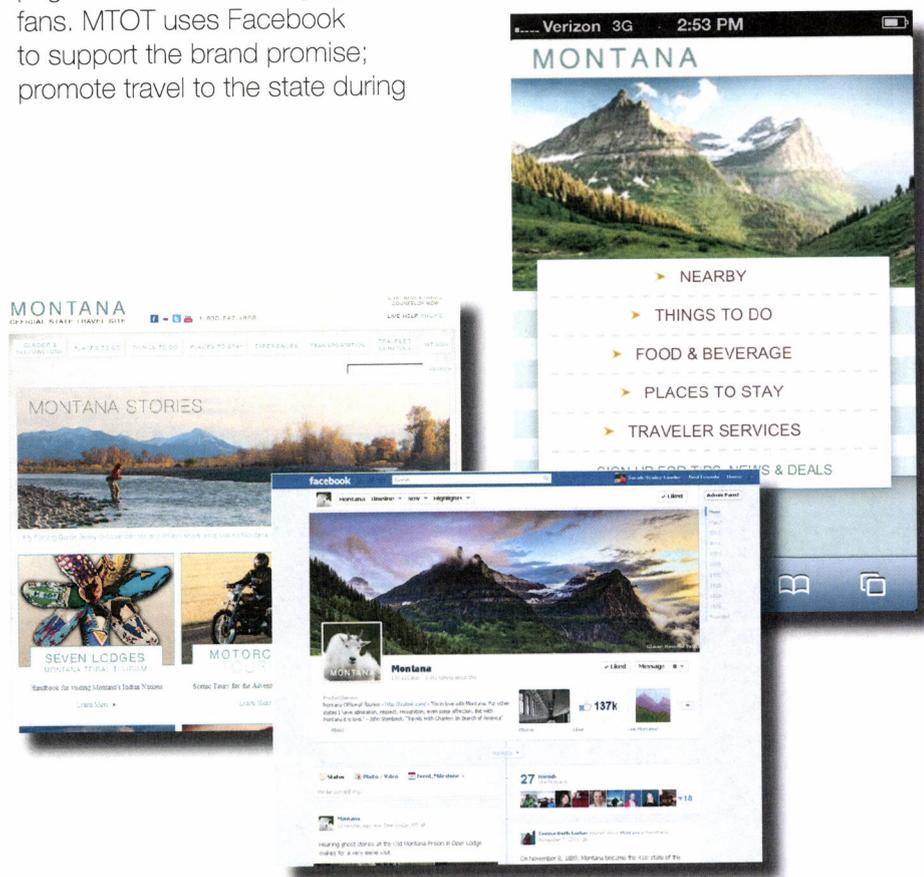
MTOT's primary consumer website, VisitMT.com received 2,018,058 visits in FY12, up almost 2% over FY11.

MTOT continued to utilize Facebook, Twitter, Flickr and YouTube effectively, with VisitMT.com. MTOT's Facebook became the most engaging state Facebook page for states with 100 -150K fans early in 2012. As of June, 2012, MTOT's Facebook page had over 140K engaged fans. MTOT uses Facebook to support the brand promise; promote travel to the state during

all seasons, foster community interaction and discussion among the fans.

In the first quarter of 2011, MTOT tested the functionality of the mobile VisitMT.com site and consequently embarked on an overarching re-build of the site based on the usability study findings.

MTOT also improved its content delivery systems by moving to a .NET platform for the search and listing display on its websites. The new system includes improved Google map features, as well as a more interactive search engine.



## ELECTRONIC MARKETING

*Electronic Marketing utilizes interactive and emerging technologies to develop innovative content that will inspire potential Montana travelers. These technologies include interactive websites, mobile apps and social media.*

*The foundation of MTOT's electronic marketing is the extensive database of places and business important to Montana's visitors. MTOT works closely with our communities and business partners to gather this information and keep it as up to date as possible.*

## ACCOMPLISHMENTS

The Branding Initiative continues to guide the efforts of the Montana Office of Tourism (MTOT) advertising and marketing, outreach, publication and web programs.

MTOT has developed a tourism and brand workshop titled "Coming Together to Expand Montana's Tourism Story" as an outreach effort to assist businesses throughout Montana in bolstering their ability to attract and retain visitors to their area.

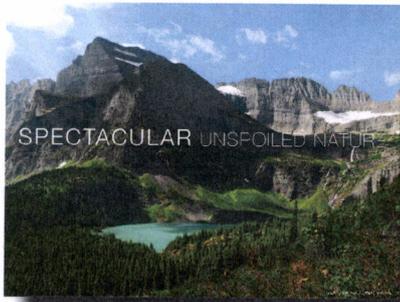
Conducted and developed a winter "brand" initiative to define and identify Montana's winter

season marketing efforts, the roles of winter stakeholders and produced the *Defining the Winter Experience* guidebook.

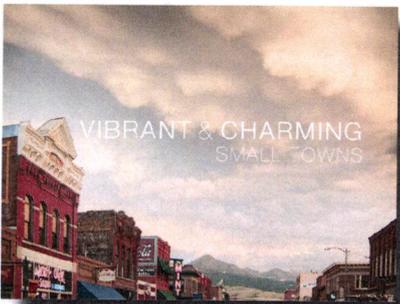
The program is also designed to help business owners learn about social media sites and beneficial practices. Five workshops were conducted in FY12.

Prior to each workshop, a 3-day road trip of the area is scheduled to visit businesses and attractions that are representative of the brand pillars. Images and posts are then shared on Facebook and Twitter to emphasize the impact of social media and how it effectively contributes to marketing efforts.

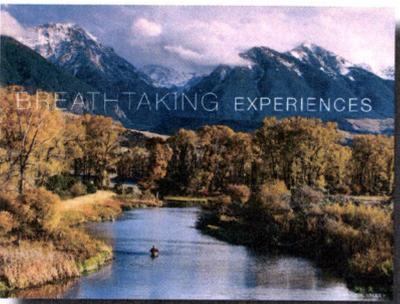
## The MONTANA BRAND is:



More spectacular unspoiled nature than anywhere else in the lower 48.



Vibrant and charming small towns that serve as gateways to our natural wonders.



Breathtaking experiences by day and relaxing hospitality at night.

# BRANDING INITIATIVE

*The brand development program is responsible for implementing and promoting a consistent positive brand image for Montana as a vacation destination. The program works to not only ensure consistency with the brand platform and brand principles, but also to develop and administer brand outreach and services to encourage cooperation and support of the Montana Office of Tourism brand strategy.*

To find out more information on the brand initiative, workshops or to view Brand Books 1, 2 & 3 visit [www.travelmontana.org/branding](http://www.travelmontana.org/branding).

## ACCOMPLISHMENTS

Public relations efforts in FY12 delivered Montana's key messages in over 500 earned media impressions via editorial, online and broadcast coverage in North America.

Supported international publicity efforts and collateral efforts between MTOT and regional constituents, hosting forty-four journalists (both domestic and international) on individual press trip visits with developed custom, story-specific itineraries. When appropriate, we escort these journalists to maximize their Montana experience(s).

Hosted and provided financial assistance with three group press trips, partnering with in-state tourism constituents and private tourism businesses including lodging properties, outfitters, restaurants, museums and others.

Coordinated and assisted three TV production crews on multi-day shoots. The logistics of hosting broadcast media is particularly intensive, yet yields high return on investment.

Provided hundreds of journalists with researched information, recommendations, contacts, photographs and all of the elements necessary to develop editorial stories on travel and vacationing in Montana.

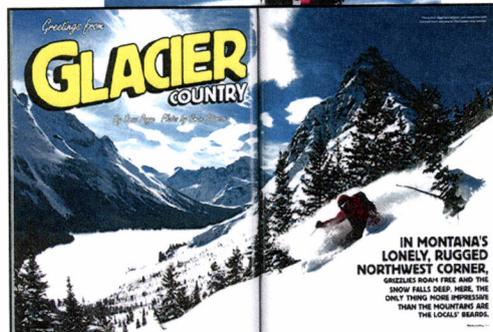
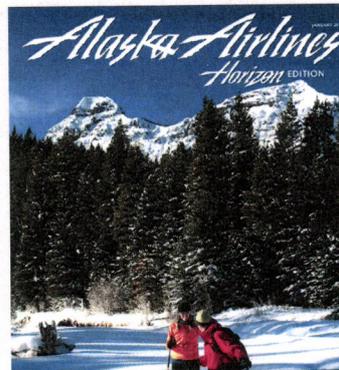
Expanded story idea content and photos on MTOT's pressroom website - [www.pressroom.visitmt.com](http://www.pressroom.visitmt.com). This

media-specific web presence increased the number of inquiries and PR opportunities.

Maintained a media database of 1,700 active contacts, updating and adding influential travel journalists, bloggers and broadcast contacts annually.

Continue to provide information to the industry via [www.montanatourismnews.org](http://www.montanatourismnews.org) and accompanying e-newsletter to provide timely, relevant news and resources to our tourism partners.

Cultivated media coverage of Montana's tourism and film industry through 42 in-state and out-of-state press interviews.



**Backcountry**  
THE UNTRACKED EXPERIENCE

Unplug and unwind at these lake escapes, where time stands still, nature reigns, and there's a profound sense of peace.

Introduction By JOYCE MAYNARD

## PUBLIC RELATIONS & PUBLICITY

*Our public relations & publicity program enables us to tell Montana's myriad tourism stories, leveraging the editorial credibility of journalism.*

*Working with a lifestyle media, our public relations team garners placement in all media channels: print, web, broadcast and social, to create awareness for the state's vast range of destinations.*

*We serve as a clearinghouse of Montana information and a concierge service to travel media, providing logistical and vetted financial assistance to media-producing articles and/or programming on Montana.*



## ACCOMPLISHMENTS

Created one, ad-free, year-round guide (*Montana Guidebook*) marketing Montana in all seasons. Study results revealed advertising undermines the guide's authenticity and credibility and overshadows any interesting content. Winter 2011-2012 marked the last season for distributing the *Montana Winter Guide*.

Created an exciting new visual design to the tourism side of the Montana Highway Map. A *Quick Response (QR)* code scanned by smart phones gives access to 321 Montana city maps.

Launched a new iPad magazine app, *Get Lost in Montana-The Magazine*, with stories and snapshots of Montana's real flavor begging visitors to get off the beaten path and...*Get Lost in Montana*.



## PUBLICATIONS

*The Montana Office of Tourism publications provide coverage of Montana's year-round recreation and attractions to visitors of all ages in print, digital and app format.*

*These free guides and magazine are packed full of gorgeous photos, itinerary suggestions and easy-to-read information helping our visitor further their sense of discovery for planning their trip or while in Montana.*

*They give the local story with depth and perspective portraying Montana at its best.*

The guides have been designed to be used in conjunction with the Montana Office of Tourism's website, [www.VisitMT.com](http://www.VisitMT.com). Consumers can use the printed guides, supplemented by [www.VisitMT.com](http://www.VisitMT.com) and [www.WinterMT.com](http://www.WinterMT.com) to create fun-filled itineraries on where to go, how to get there, where to stay and what to do for a very personal experience.

## ACCOMPLISHMENTS

Coordinated Group Market advertising in major trade publications, which also includes an online presence.

Attended three national conventions promoting Montana National Tour Association (NTA),

American Bus Association (ABA) and Travel Alliance Partners (TAP).

Hosted several domestic tour operators on individual familiarization tours across Montana.



## ACCOMPLISHMENTS

Thirty seven European, Scandinavian and Australian tour operators met with fourteen Montana suppliers at the Rocky Mountain International Roundup in Buffalo, Wyoming.

Hosted 39 tour operators on the Mega Fam which included four nights in Montana's Glacier Country before moving into Idaho.

Hosted numerous European, Scandinavian and Australian tour operators on individual Familiarization tours throughout Montana.

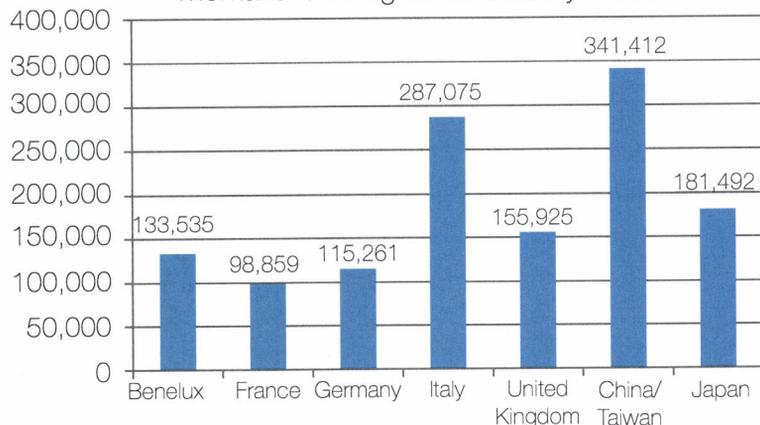
MTOT participated in TTGIcontri in Italy, World Travel Market in the United Kingdom, Scandinavian Mission, Australian Mission, ITB in Berlin and French Mission.

Montana was also represented at consumer shows in our European markets.

Met with forty-six tour companies at US Travel Associations, International PowWow.

Montana saw an increase of 12% in overnights offered by Tour Operators.

Montana Overnights Offered By Market



## GROUP TOURS

*The Group Travel program provides tour operators with the tools to build a successful group tour product. Group tours can bring a substantial amount of money to our state.*

*For example, on average, an individual touring on a motorcoach will spend \$183 per day, and a full capacity motorcoach contributes \$5,000 to \$7,000 per day to the local economy.*

## OVERSEAS MARKETING

*The Montana Office of Tourism continues marketing in Europe, Scandinavia and Australia, as well as Japan and Taiwan. We continue to see increased overnights offered in each market.*

## ACCOMPLISHMENTS

### VISITOR INFORMATION CENTERS (VICs)

Partnered with the Montana Department of Transportation to produce and distribute travel-related information posters in rest area kiosks around the state.

VICs served 171,778 travelers May through September in 2012.

Travelers assisted by VIC staff lengthened their stay by 31%.

From April through September, average expenditure per group per trip for VIC staff-assisted travelers was approximately 55% higher than that of all visitors.

VICs provide free WiFi service.

Made in Montana products are displayed in VICs.

### SPECIAL EVENTS GRANT PROGRAM (SEGP)

SEGP provided \$100,000 for eight annual events in six Montana communities:

**Big Sky** – Big Sky PBR

**Great Falls** – The Russell: Sale to benefit the CM Russell Museum

**Helena** – 52nd Annual Last Chance Stampede & Fair

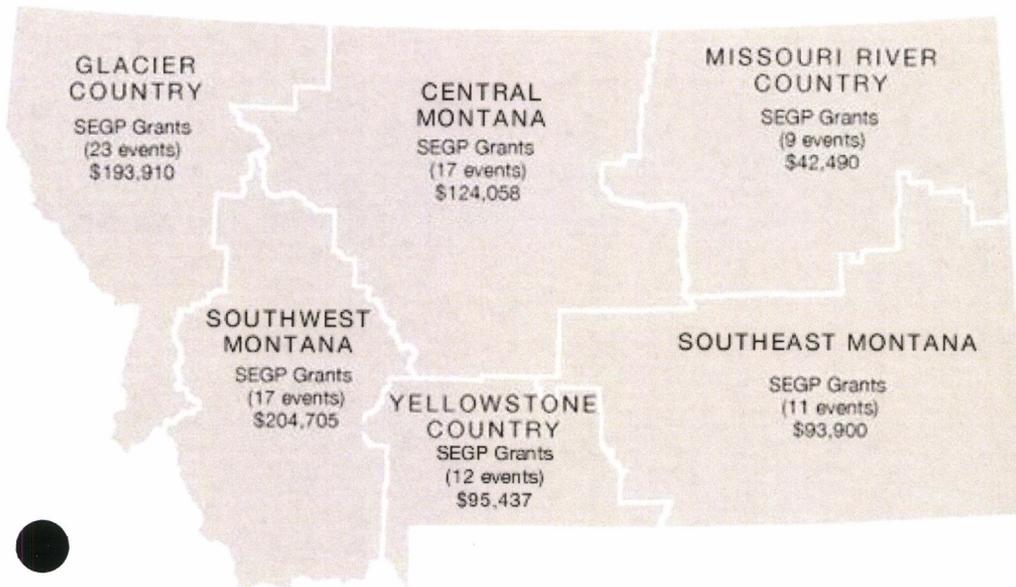
**Helena** – Montana Wild West Fest

**Hobson** – Montana Bale Trail

**Kalispell** – Big Sky Classic

**Kalispell** – Montana Dragon Boat Festival

**West Yellowstone** – Kids' N' Snow



## VISITOR INFORMATION SERVICES

*The Visitor Information Services (VIS) Program is a component of an integrated and comprehensive tourism marketing strategy. Upon arriving in and traveling through Montana via highway, air, or rail, travelers need an integrated, strategic system of information from a variety of sources for a successful vacation experience.*

## ACCOMPLISHMENTS

2012 Montana Governor's Conference on Tourism & Recreation provided tourism education and training for 378 attendees.

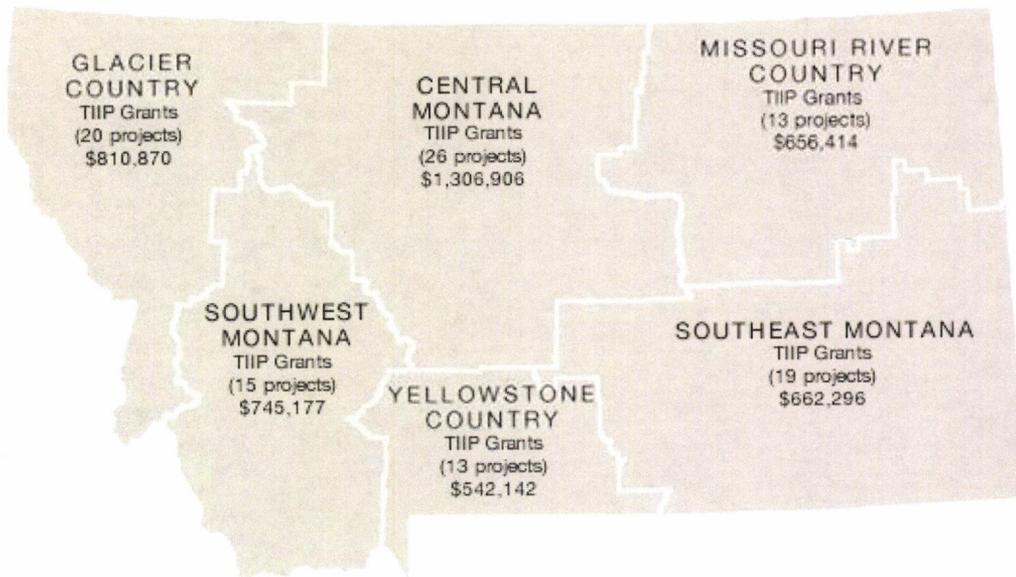
Multi-State Tourism Planning Project underway involving SE Montana, NE Wyoming and the western Dakotas.

Montana Superhost Program provided customer service training to 1,533 individuals through Community and High School Seminars, on-line training, and Supervisor-level Training Webinars.

## TOURISM INFRASTRUCTURE INVESTMENT PROGRAM (TIIP)

TIIP invested \$530,000 into twelve projects resulting in \$3 million in facility improvements (\$5/\$1 leverage).

- Big Sky** – Big Sky Community Park
- Butte** – World Museum of Mining
- Bynum** – Two Medicine Dinosaur Center
- Choteau** – Pine Butte Guest Ranch
- Glasgow** – Children's Museum of Northeast Montana
- Glasgow** – Valley Event Center
- Great Falls** – Ursuline Center
- Helena** – Exploration Works
- Huntley** – Huntley Project Museum
- Kalispell** – Museum at Central School
- Missoula** – Caras Park Pavilion
- Red Lodge** – Carbon County Museum



# TOURISM DEVELOPMENT & EDUCATION

*The TD&E program focuses on providing technical, financial and marketing assistance for tourism-related projects. Assistance is provided through education services, including workshops, an annual conference, a recurring statewide strategic planning process and a customer service training program.*

# MONTANA FILM OFFICE



## ACCOMPLISHMENTS

Assisted in bringing more than sixty-seven productions to Montana with an estimated direct economic impact of \$7.141 million and 179 FTE jobs.

Promoted and administered the Big Sky on the Big Screen Act, Montana's film production incentive bill. This tax credit program keeps Montana competitive among other states and nations.

Certified thirteen new productions for the Big Sky on the Big Screen Act.

Hosted 56,320 user sessions and 151,814 page views on [www.MontanaFilm.com](http://www.MontanaFilm.com), which lists more than 368 Montana crew members and 1,000 businesses that provide services to the industry.

Garnered over 1,539 followers on Facebook, over 2,193 on Twitter and over 6,631 views of Film Office videos on YouTube.

Fielded 216 project inquiries, a 28% conversion rate.

Worked with a number of notable new television shows, films and national commercials. TV shows like NBC's *Navy Seal Team 6*, *Ax Men*, and *The American Rancher* showcased Montana ranchers. The feature film *Winter in the Blood* adapted from Montana novelist James Welch's filmed on location in Havre, Chinook and Fort Belknap. Oscar winning Director, Alexander Payne began prep for his next film in the Billings

area.

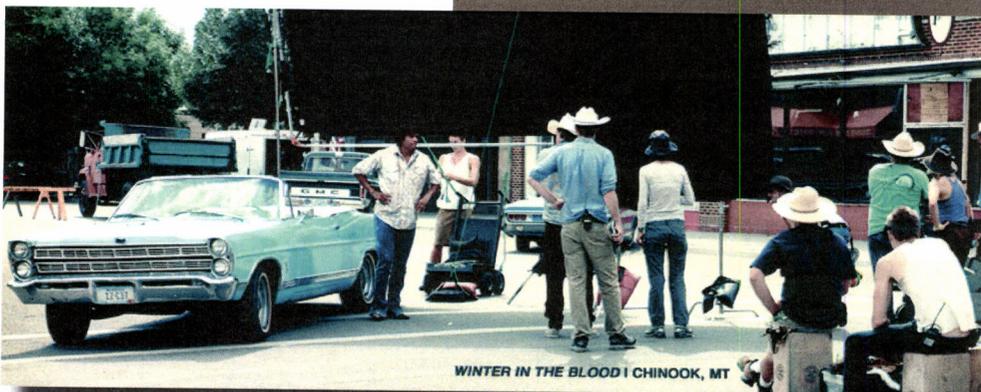
National TV commercials were filmed including Toyota, Lincoln, Dodge Ram and John Deere. Still photo magazine shoots were captured for H&M, Anthropologie and Johnson's Baby.

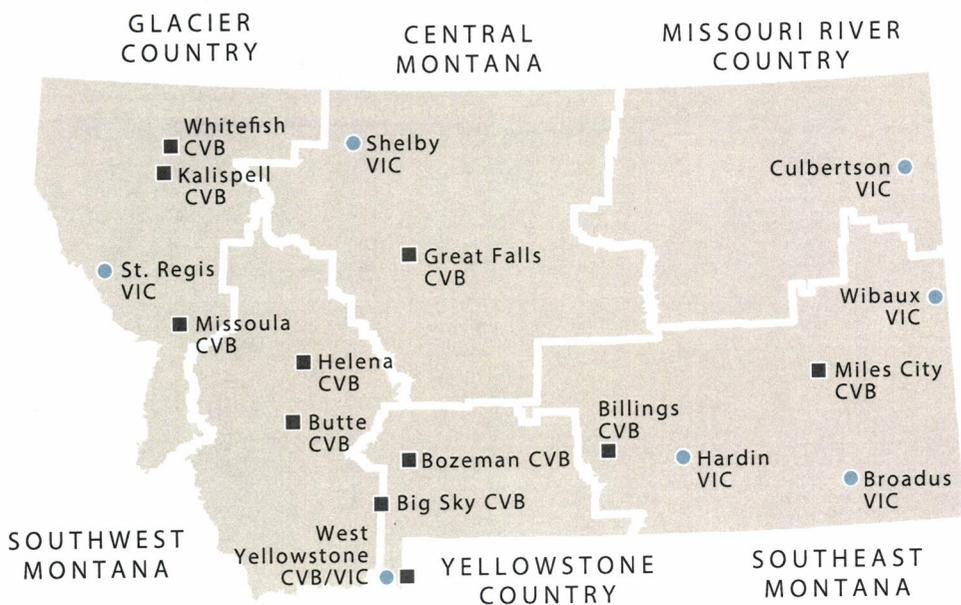
Creating the Montana Big Sky Film Grant adds additional financial support for feature films, TV productions and resident Montana filmmakers that shoot more than 50% in the state and hire local Montanans.

Created an iPhone mobile app that provides a searchable and GIS mapped location images, crew members and services needed for production of film, TV and still photo production.

## MONTANA FILM OFFICE

*The Montana Film Office brings economic development to the state by promoting Montana as a motion picture and television production destination. [www.MontanaFilm.com](http://www.MontanaFilm.com)*





- CVB Location (Convention and Visitors Bureau)
- VIC Location (Visitor Information Center)

**Cyndy Andrus** | Chair\* (2015)  
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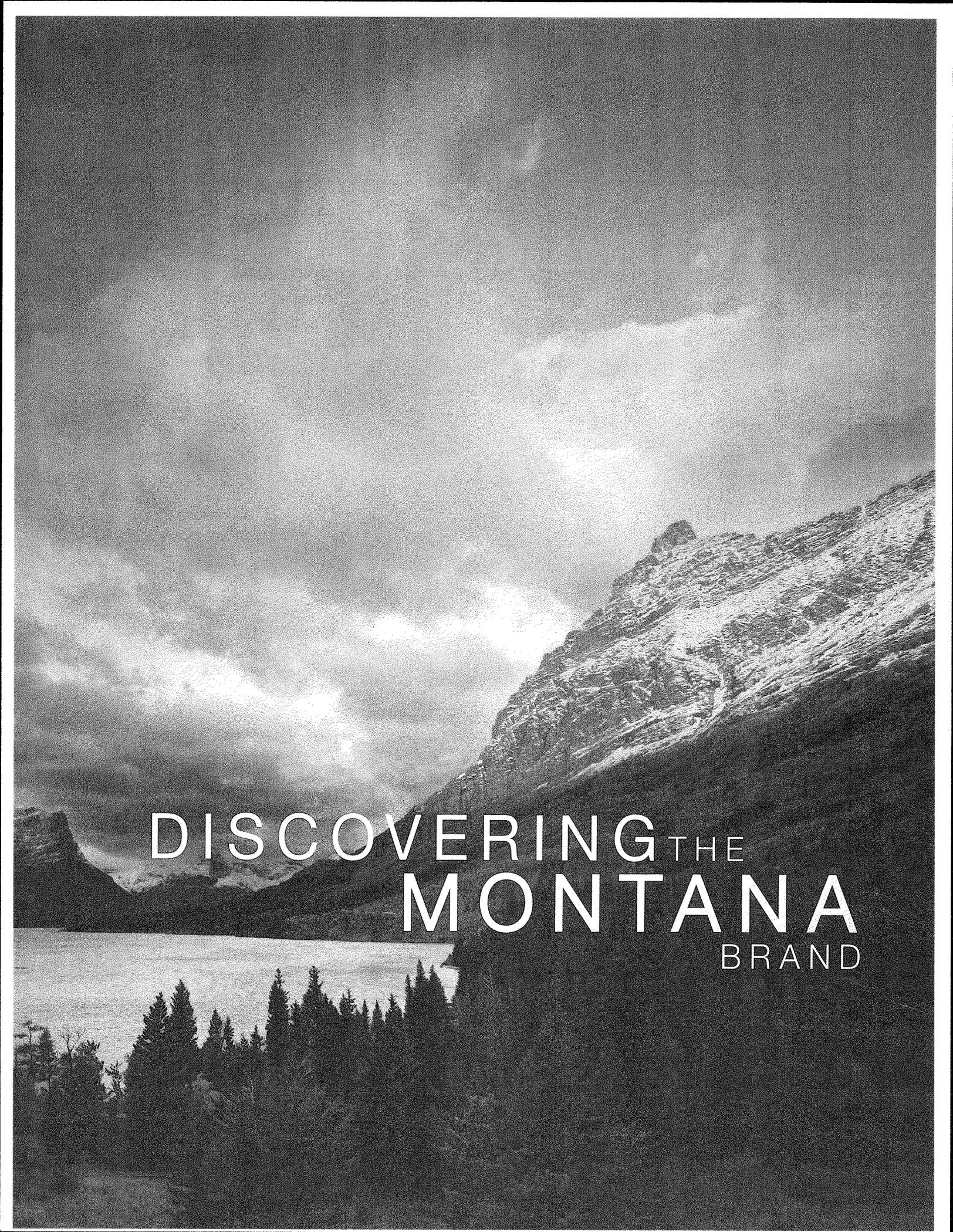
**Jackie Yellowtail** (2015)  
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 jyellowtail@crownnations.net

\* Executive Committee

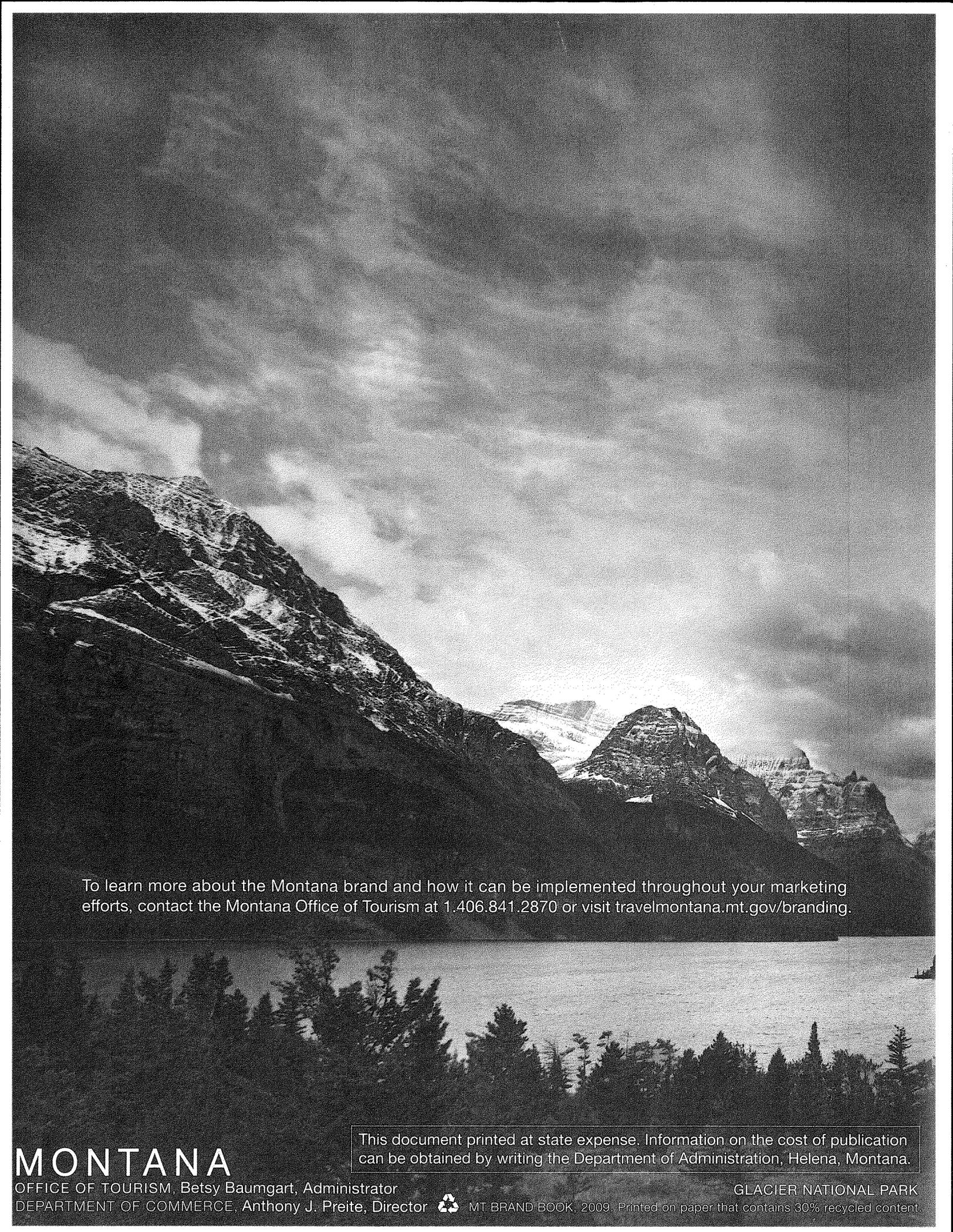
# MONTANA'S TOURISM PARTNERS

*Montana's tourism industry is comprised of a multitude of entities working tirelessly to promote Montana and enhance our visitors' travel experience. It is because of the dedication and active participation of our tourism partners throughout the state that Montana continues to be a valued and treasured travel destination.*

# TOURISM ADVISORY COUNCIL



DISCOVERING THE  
MONTANA  
BRAND



To learn more about the Montana brand and how it can be implemented throughout your marketing efforts, contact the Montana Office of Tourism at 1.406.841.2870 or visit [travelmontana.mt.gov/branding](http://travelmontana.mt.gov/branding).

# MONTANA

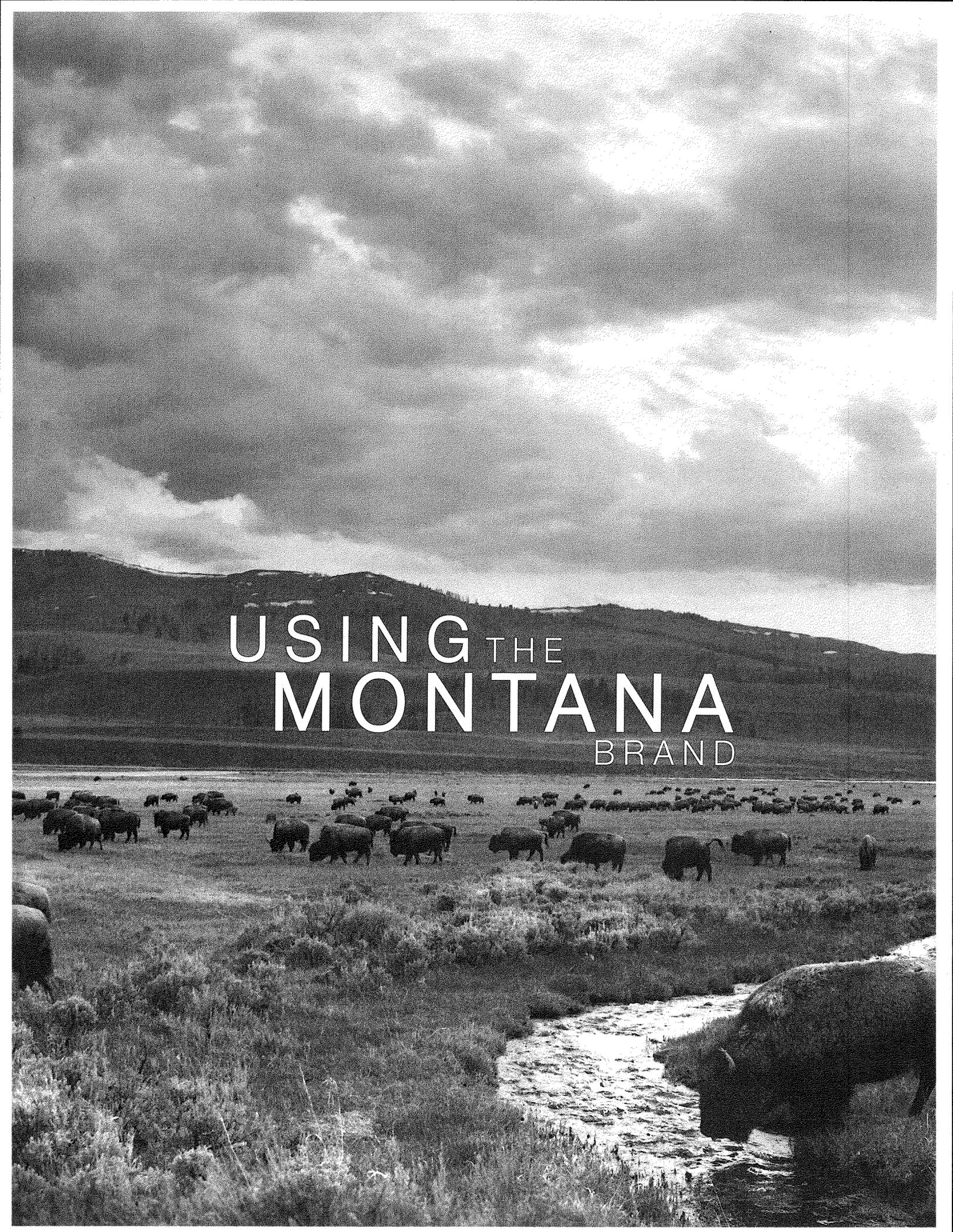
OFFICE OF TOURISM, Betsy Baumgart, Administrator  
DEPARTMENT OF COMMERCE, Anthony J. Preite, Director

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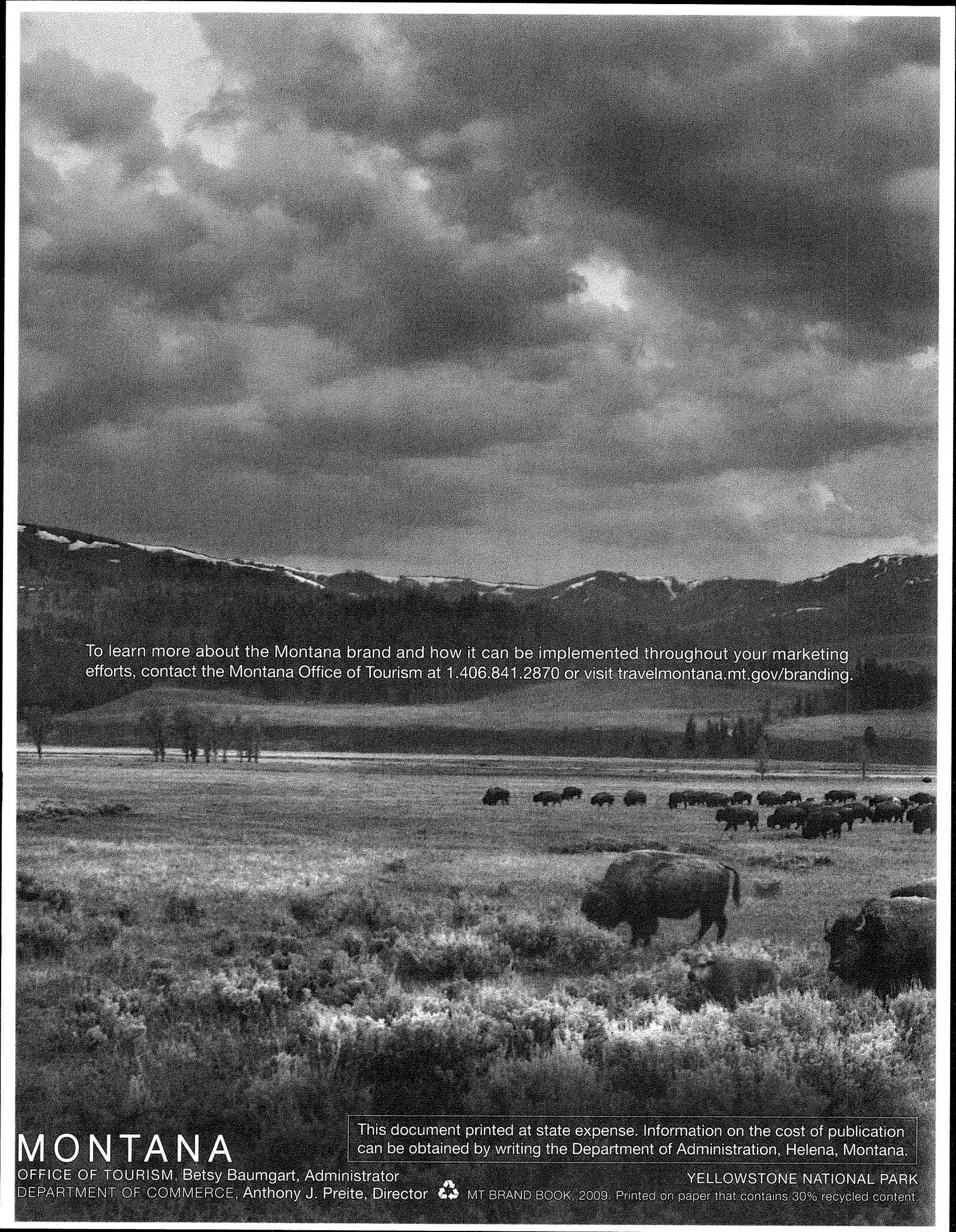


MT BRAND BOOK, 2009. Printed on paper that contains 30% recycled content.

GLACIER NATIONAL PARK



USING THE  
MONTANA  
BRAND



To learn more about the Montana brand and how it can be implemented throughout your marketing efforts, contact the Montana Office of Tourism at 1.406.841.2870 or visit [travelmontana.mt.gov/branding](http://travelmontana.mt.gov/branding).

**MONTANA**

OFFICE OF TOURISM, Betsy Baumgart, Administrator  
DEPARTMENT OF COMMERCE, Anthony J. Preite, Director

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MT BRAND BOOK, 2009. Printed on paper that contains 30% recycled content.

YELLOWSTONE NATIONAL PARK

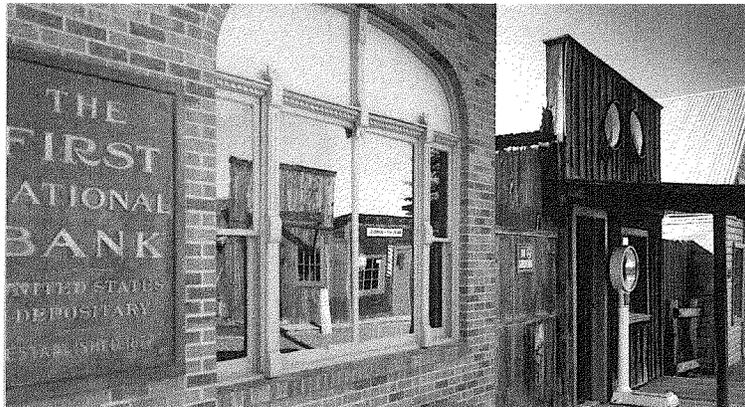
# MONTANA THE ULTIMATE LOCATION



montanafilm.com

Rocky Mountain Front





## MONTANA. NOW UP TO 25% MORE ULTIMATE.

Our new incentive options deliver up to 25% cash back.

- **The Montana Big Sky Film Grant, a NEW program that puts up to \$1 million cash in hand within days of wrapping principal photography.**
- **14% back on Montana crew and talent salaries paid.**
- **9% back on production-related expenditures made in Montana.**
- **No state sales tax.**
- **Tax exemption for qualifying accommodation stays.**
- **No cap. No minimum spend.**
- **Plus, detailed support in location scouting, permitting and logistics.**

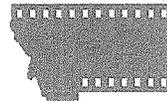
Apply now at [montanafilm.com](http://montanafilm.com). Or call 1-800-553-4563. And let's get your picture made.



**PUT MONTANA IN THE PALM OF YOUR HAND.**

*Download our Reel Scout iPhone app at the Apple App Store.*

**MONTANA**  
FILM OFFICE

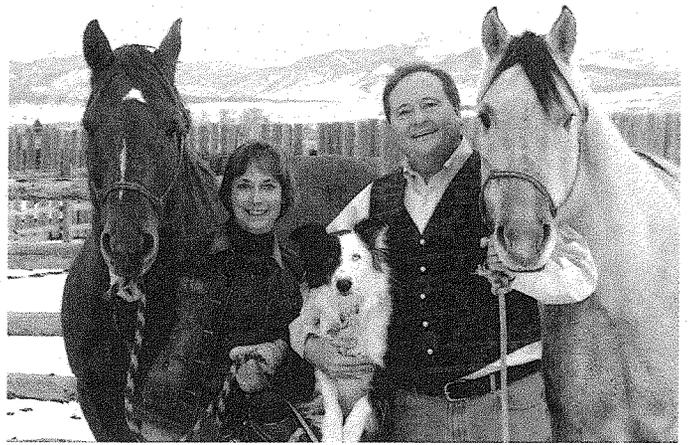


# MONTANA

OFFICIAL HIGHWAY MAP



FOR FREE DISTRIBUTION · VISITMT.COM



## WELCOME TO MONTANA

Under the big sky of Montana, you'll discover some of the greatest natural and cultural treasures on earth. From stunning scenery and dazzling waters to geologic wonders and cultural history, Montana offers something for everyone. The diverse recreational and educational opportunities make this a great place to live and a special place to visit.

Be sure and stop by a new Roadside Geological Marker , a part of the Governor and First Lady's Math and Science Initiative which invites students to learn about science and math and explore Montana's splendid surroundings.

We're pleased to join all 989,415 of Montana's residents in welcoming you to our Big Sky State. Enjoy your stay!

*B + Nancy*

Governor Brian Schweitzer and  
First Lady Nancy Schweitzer

*ON THE COVER: Beargrass, Glacier National Park, Donnie Sexton*

There's a wealth of information about our state free for the asking. Call **800.VISIT MT (800.847.4868 ext. 11 HM)** or **406.841.2870** to request information about lodging, camping, fishing, skiing, snowmobiling, golf or other activities. **TDD 406.841.2702.**

Visit us on the web at [www.visitmt.com](http://www.visitmt.com).  
Kids can play on [www.montanakids.com](http://www.montanakids.com).

Visit Montana's Department of Transportation web site for information about scenic byways, road reports, weather, bicycle routes and more at [www.mdt.mt.gov](http://www.mdt.mt.gov).

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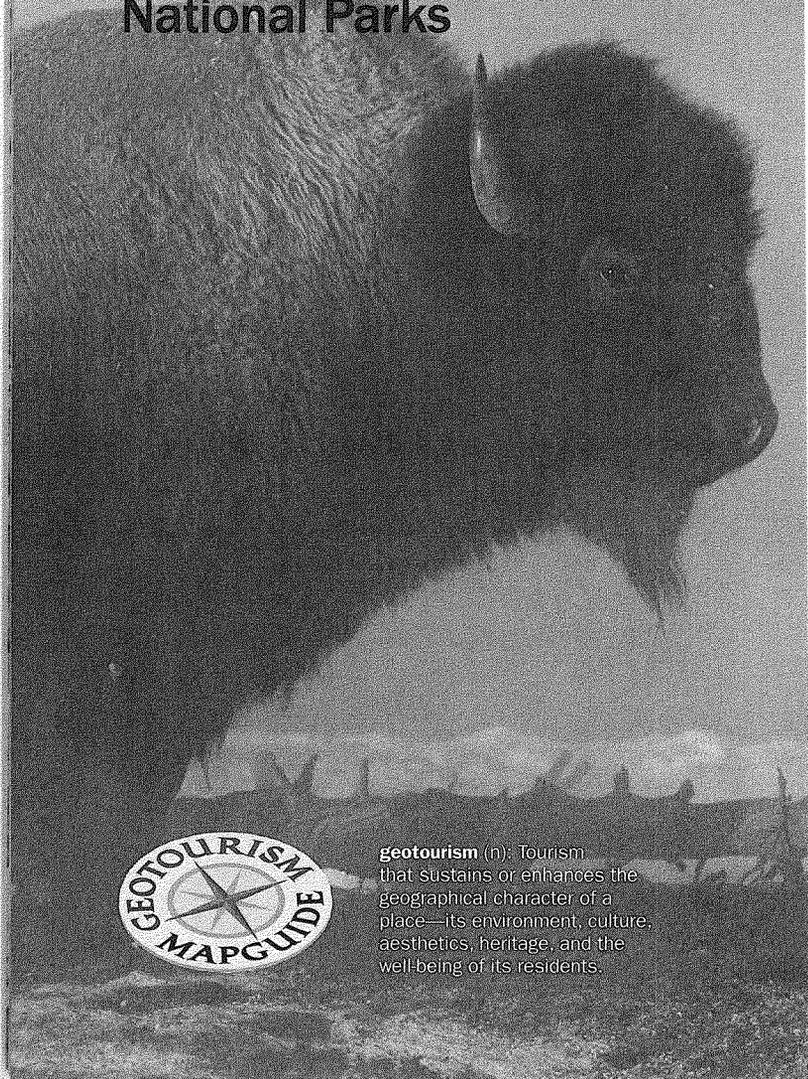


NATIONAL  
GEOGRAPHIC

# Greater Yellowstone Region

IDAHO, MONTANA, and  
WYOMING

including Yellowstone  
and Grand Teton  
National Parks



**geotourism** (n): Tourism that sustains or enhances the geographical character of a place—its environment, culture, aesthetics, heritage, and the well-being of its residents.

# Landscape Changes and Challenges

"The biggest challenge to wildlife here will be global warming. The numbers I've seen say the western U.S. could lose half its wild trout habitat by the end of this century. That would be devastating for fishing, local economies, and the whole ecology of the place. Grizzlies won't make it without fish, and Yellowstone without grizzlies is hard to imagine."

—Craig Matthews, fly shop owner, Blue Ribbon Flies, West Yellowstone, MT

"Three years ago, you couldn't see any drilling rigs from town. That's all changed now. We have to get the balance right between wilderness, recreation, and natural gas development. Last winter, we had four ozone alerts here, and that helped wake people up to what we could be losing."

—Mindi Crab, Pinedale, WY

"Lots of people think of sagebrush drylands as expendable. Yet, sage grouse depend on these areas, which also provide indispensable food and cover for mule deer, pronghorn, wild birds, and rodents. Fire keeps competing plants from crowding out sagebrush, but it's getting harder to allow natural fires to burn when we have to protect all the homes that border public lands. That's a big reason sagebrush is one of the most threatened habitats in Wyoming."

—Jerry Allertall, Wyoming Game and Fish habitat biologist, Cody, WY



American Falls  
Reservoir  
POCATELLO  
REGIONAL  
AIRPORT  
30  
To Boise

National Geographic and the people of Idaho, Montana, and Wyoming present this Geotourism Mapguide to the Greater Yellowstone region.

Lead project partners include the National Geographic Center for Sustainable Destinations, National Geographic Maps, and the Greater Yellowstone Geotourism Stewardship Council, with regional coordination provided by Greater Yellowstone Coalition and the Yellowstone Business Partnership.

We gratefully acknowledge funding support from the following: Bureau of Land Management; Greater Yellowstone Coalition; Idaho Division of Tourism Development; National Park Service; Travel Montana and its partners; Yellowstone County Tourism region and the Bozeman, Big Sky, and West Yellowstone Convention and Visitor Bureaus; United States Forest Service; and Wyoming Travel and Tourism.

Text by Michele Archie, author; Tom Miller, editor; Map notes by David Thomas

Visit [www.YellowstoneGeotourism.org](http://www.YellowstoneGeotourism.org) to learn more about the Greater Yellowstone region.



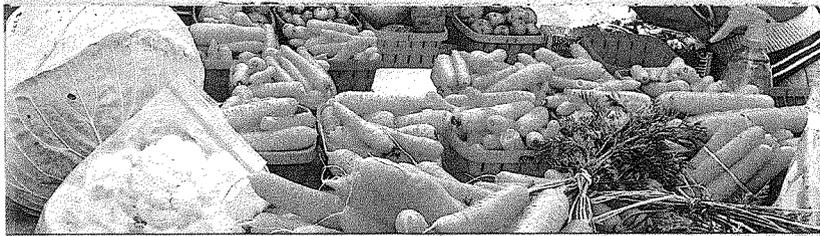
NATIONAL  
GEOGRAPHIC

# Crown of the Continent

ALBERTA  
BRITISH COLUMBIA  
MONTANA  
including  
Waterton-Glacier  
International  
Peace Park



**geo-tour-ism** (n): Tourism that  
sustains or enhances the  
geographical character of a  
place — its environment, culture,  
aesthetics, heritage, and the  
well-being of its residents.



## Eating Local

"Who's your farmer? People want to know. Family farms are central to the culture and beauty of the Flathead Valley. This area is well known for wild foods like huckleberries, morel mushrooms, whitefish, and venison, but we also have the right soil and climate to grow cherries and plums, pork and beef, and all kinds of vegetables. Local farmers have developed a marketing network to provide local food to restaurants, markets, bakeries, and a bed and breakfast. Our FarmHands map guides you to 60 Flathead farms and 28 businesses that serve local food."

— Pam Gerwe, Purple Frog Farm, Whitefish, MT

"More and more of our customers demand fresh local food, such as grass-fed local beef steaks. For us, that's an important part of the wilderness pack trip. It just tastes better."

— Corlene Martin, Bob Marshall Wilderness camp cook, Choteau, MT

**National Geographic and the people of Alberta, British Columbia, and Montana present this Geotourism MapGuide to the Crown of the Continent region.**

Lead project partners include the National Geographic Center for Sustainable Destinations, National Geographic Maps, and Crown of the Continent Geotourism Council, with regional coordination provided by the National Parks Conservation Association and the Chinook Institute for Community Stewardship.

We gratefully acknowledge funding support from the following: Alberta Ministry of Tourism, Parks, Recreation and Culture; Alberta SouthWest Regional Alliance; Glacier National Park with the Glacier Natural History Association; Henry P. Kendall Foundation; Kootenay Rockies Tourism, British Columbia; The Sustainability Fund; Trail of the Great Bear; Travel Montana geotourism consortium, including the Montana Department of Commerce, the regional tourism commissions of Glacier Country, Russell Country, and Gold West Country, and the visitors bureaus of Flathead Valley and Whitefish; U.S. Department of the Interior-Bureau of Land Management; U.S. Forest Service with Montana Scenic Loop; University of Montana Public Policy Research Institute; Waterton Chamber of Commerce; Waterton Lakes National Park; Wilburforce Foundation; and Yellowstone to Yukon Conservation Initiative.

Text by David Thomas and Steve Thompson; David Jeffery, editor.



### How This MapGuide Was Made

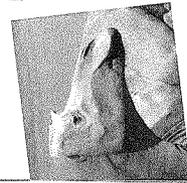
The people of the Crown of the Continent helped build this MapGuide by nominating the places and telling the stories of this region. A diverse regional alliance, the Crown of the Continent Geotourism Council, has formed to engage visitors and residents in strategies that sustain and enhance the special qualities of this transboundary region.

Visit [www.CROWNOFTHECONTINENT.net](http://www.CROWNOFTHECONTINENT.net) to learn more about the Crown of the Continent and this spectacular landscape.

# A STEP-BY-STEP GUIDE

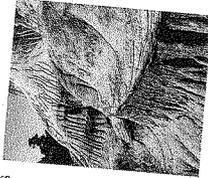
## THE MONTANA DINOSAUR TRAIL

Today, Montana is filled with uncrowded spaces. But that wasn't necessarily the case when dinosaurs ruled the earth.



In fact, Montana has yielded some of the world's most significant dinosaur discoveries. For instance, the *Maiasaura* nests found at Egg Mountain near Choteau have been hailed as one of the most important discoveries ever for dinosaur biology: *Maiasaura*, or mother lizard, is Montana's official state fossil. The first *Tyrannosaurus rex* ever unearthed - as well as the largest *Tyrannosaurus rex* ever - were found in Montana. And "Leonardo" the mummy dinosaur (a *Brachyophosaurus*) named by the Guinness Book of World Records as the "world's best preserved dinosaur," has its home in Malta, Montana.

Landscapes also exposed rock formations from nearly every geologic era - including the Cretaceous and Jurassic periods, when dinosaurs lived. In other words, the rock formations filled with dinosaur fossils are "at the surface," often exposed in dry, rocky "badland" environments. That means very little vegetation and topsoil cover the fossils, so erosion has helped paleontologists (or, in most cases, farmers, ranchers, hikers and the like) discover them. Finally, because Montana is sparsely populated, sites haven't been disturbed or covered by heavy development. Put it all together, and you have the ideal conditions for discovery!



### DISCOVERY IN COMFORT

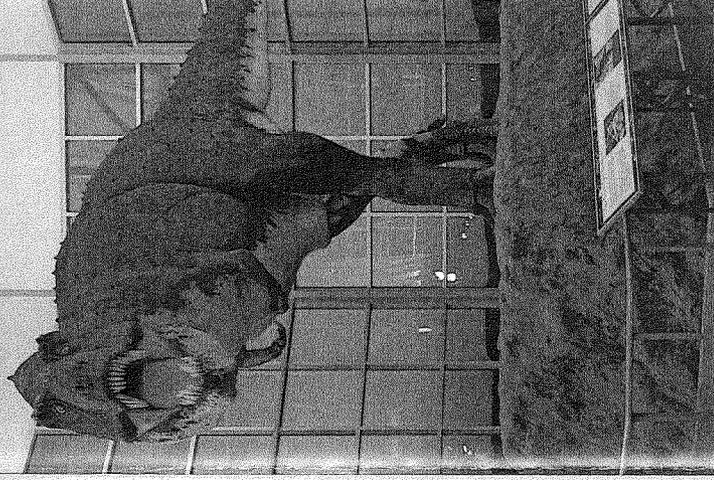
While the dinosaurs had to fend for themselves, each of the Montana Dinosaur Trail stops can help you discover their community's lodging, restaurants, entertainment and recreation services - amenities to add comfort to your adventure.

### YOU KNOW WHERE. NOW HERE'S WHY.

Landscape and access, two keys to Montana's "Paleo Treasures." Montana is, of course, known for its stunning variety of landscapes, ranging from the rugged peaks of the Rocky Mountains to the sweeping eastern plains. The folding and shifting that produced these varied

# THE MONTANA DINOSAUR TRAIL

150 MILLION YEARS IN THE MAKING.



WWW.MTDINOTRAIL.ORG

The Montana Dinosaur Trail project funding partners include all trail facilities listed inside, along with the organizations and agencies listed below:

**Montana State Parks**  
406-444-3750  
lvp.mt.gov/parks

**Bureau of Land Management**  
**Montana State Office**  
406-896-5000  
www.blm.gov/mt

**U.S. Army Corps of Engineers**  
**Fort Peck Lake**  
406-526-9493  
http://www.army.mil/fortpeck/

**Castle Country**  
800-346-1876  
www.CastleCountry.com

**Missouri River Country**  
806-653-1319  
www.missouririvercountry.com

**Russell Country**  
800-527-5348  
www.russellcountry.com

**Yellowstone Country**  
800-736-5276  
www.yellowstonecountry.net

**Montana Office of Tourism**  
800-847-4868 (VISIT MT)  
www.visitmt.com

The Montana Dinosaur Trail Prehistoric Passport is your guide back in time - millions of years back - as you explore the Montana Dinosaur Trail. Get yours now!

Go to [www.mtdinotrail.org](http://www.mtdinotrail.org) for more information.



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## CAN YOU DIG IT?

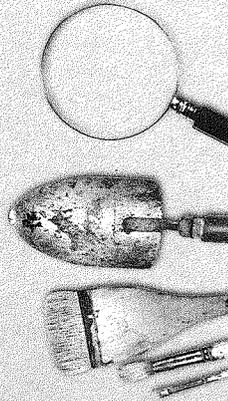
Yes, you can. But make that a qualified yes, because you shouldn't head out on your own with a shovel and pick. First, it's unlikely you'll find anything. Second, it's illegal to dig for fossils on public lands without a permit. If you want to dig for dinosaurs, ask at any of the Montana Dinosaur Trail facilities or contact the local Bureau of



Land Management or Forest Service Office. They'll

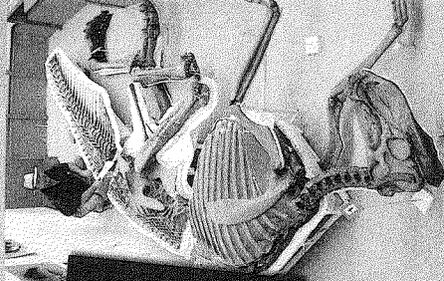
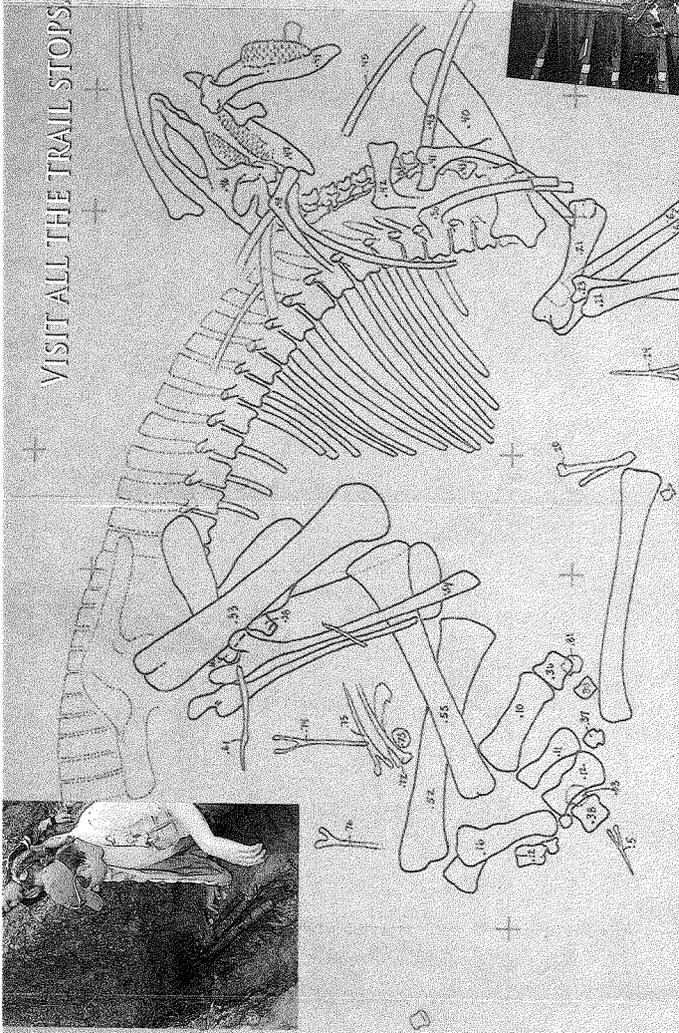
provide information about dig opportunities in their area where you can help unearth important fossil

finds correctly (there may be participation or permit fees). All Montana Dinosaur Trail members adhere to and support the current code of ethics established by the Society of Vertebrate Paleontology, which prohibits the illegal collection and sale of paleontological resources.



## VISIT ALL THE TRAIL STOPS. (THE DINOSAURS DID.)

The Montana Dinosaur Trail will show you the amazing variety Montana has to offer -- in its scenic treasures, its paleontological treasures and in the communities, large and small, that host the trail stops. The exhibits, visitor services and information at each stop may change but one thing will stay constant as you travel the trail: you'll be roaming the same ground dinosaurs once roamed themselves.



SITE MAP:  
BRACHYLOPHOSAURUS  
CANADENSIS



Located off US Hwy 2, 4th Avenue NW

**Fort Peck Interpretive Center and Museum**



The Fort Peck Interpretive Center's signature attraction is "Reddy Road", one of the complete *Therapsaurus* skeletons ever found. The lobby features a life-size replica model of Reddy's Rex, and the exhibit hall displays a full-size skeleton cast. A *Ceratops* Sea display and several other dinosaur exhibits are also highlighted. Free operation available at [www.moo.usace.army.mil/fortnl/ake\\_poff/fortpeck/museum.html](http://www.moo.usace.army.mil/fortnl/ake_poff/fortpeck/museum.html), 406-526-3493. Located 1.5 miles E of Fort Peck townsite, Lower Yellowstone Road.

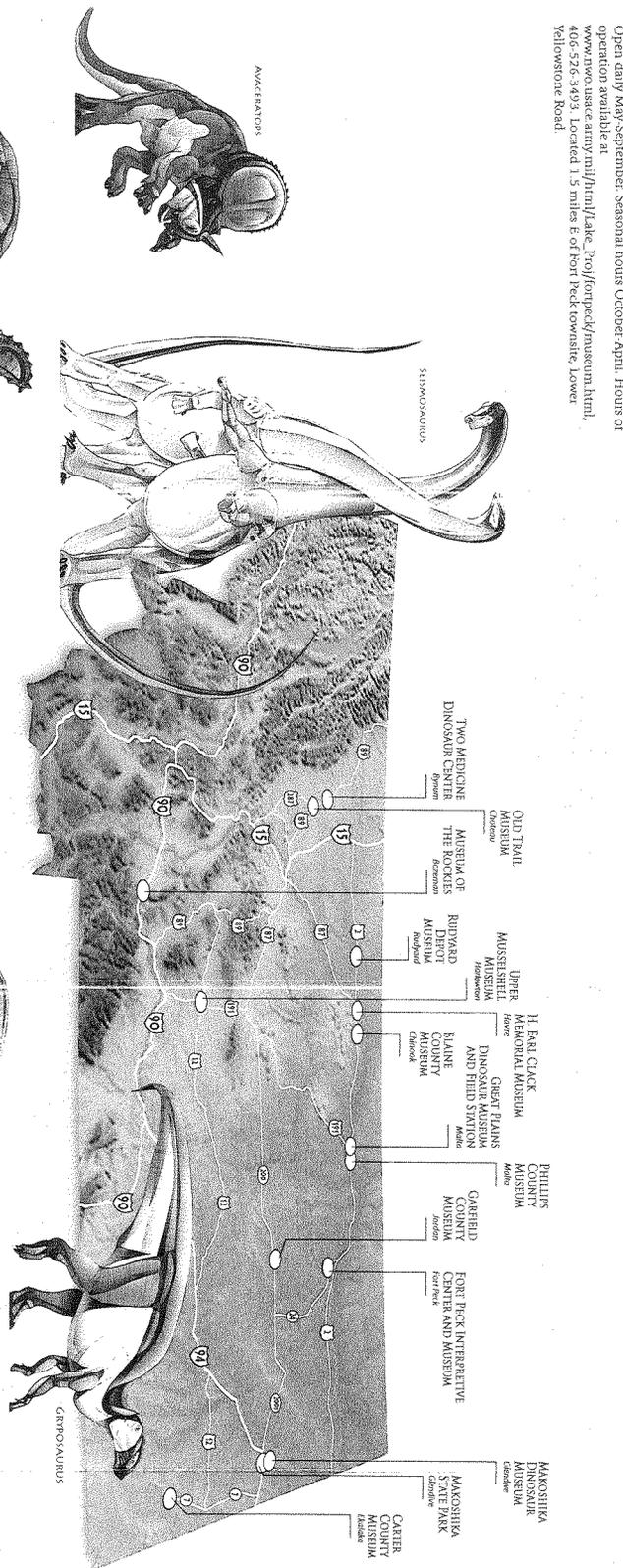


**Makoshika Dinosaur Museum**

The Makoshika Dinosaur Museum displays fossils and casts from around the world. Displays include life-sized *Allosaurus* and *Stegosaurus*. *Pterosaurs* of all sizes, dinosaur skeletons, T-rex skull and many "fleshed out" dinosaur sculptures. Season and hours of operation available at [www.makoshika.com](http://www.makoshika.com), 406-377-1637. Located downtown at 104 W 9th Street.

Antique provide additional information about the area and its rich paleontology heritage. Season and hours of operation available at [www.thedinosaurmuseum.com](http://www.thedinosaurmuseum.com), [cmr@3rivers.net](mailto:cmr@3rivers.net), 406-466-5332. Located on US Hwy 89, 823 N Main Street.

Free operation available at [www.museumofthebigdinosaur.com](http://www.museumofthebigdinosaur.com), [museum@bigdinosaur.net](mailto:museum@bigdinosaur.net), 406-632-5513. Two locations downtown: 11 & 36 S Central Avenue.



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*Step out of bounds*

# MONTANA



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# MONTANA

## 2013-2014 GUIDEBOOK

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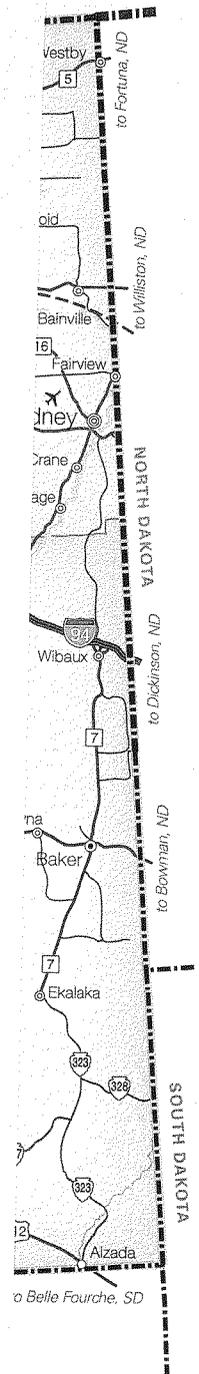
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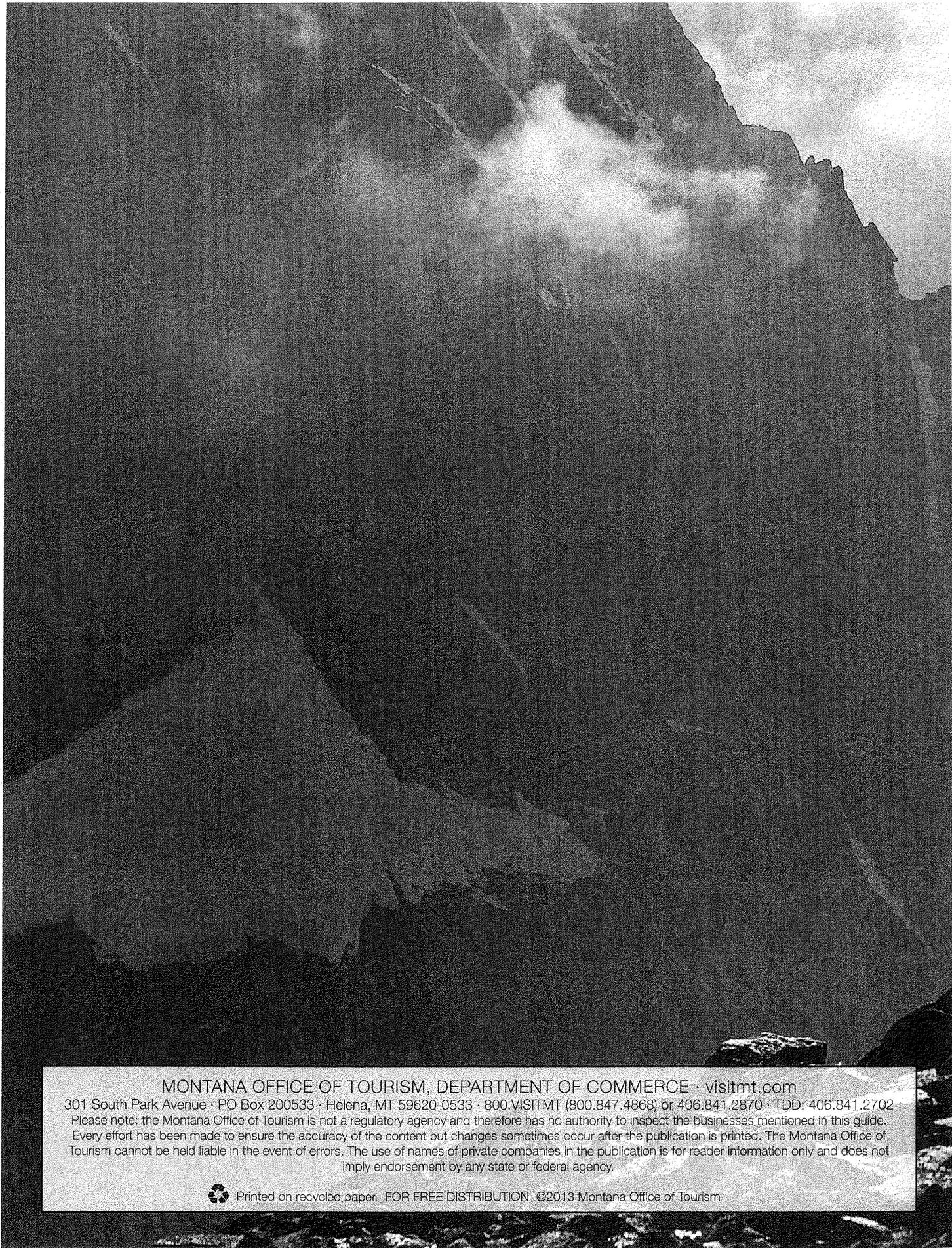


**Cover:** Encountering mountain goats while hiking to Granite Peak north of Cooke City, Sam Magro  
**Above:** Crossing the outlet at Cosley Lake, Glacier National Park, Bob Webster

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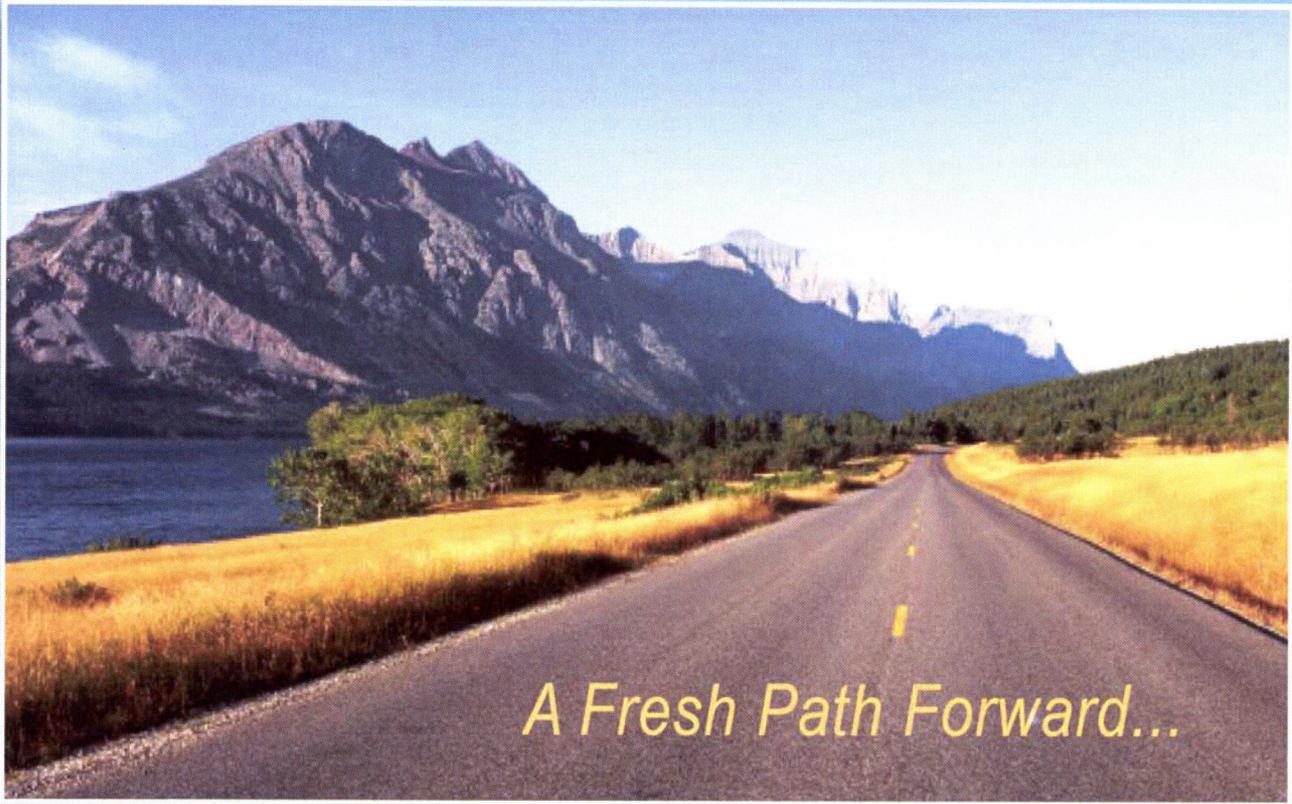
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# MONTANA

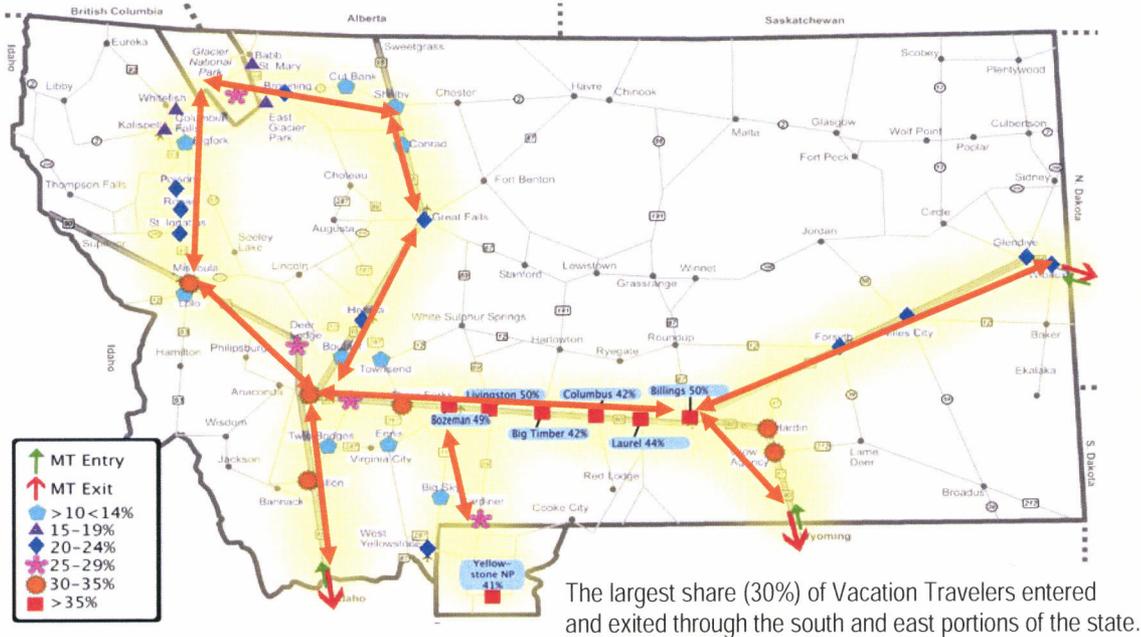
BIG SKY COUNTRY

## Tourism and Recreation Strategic Plan 2008-2012

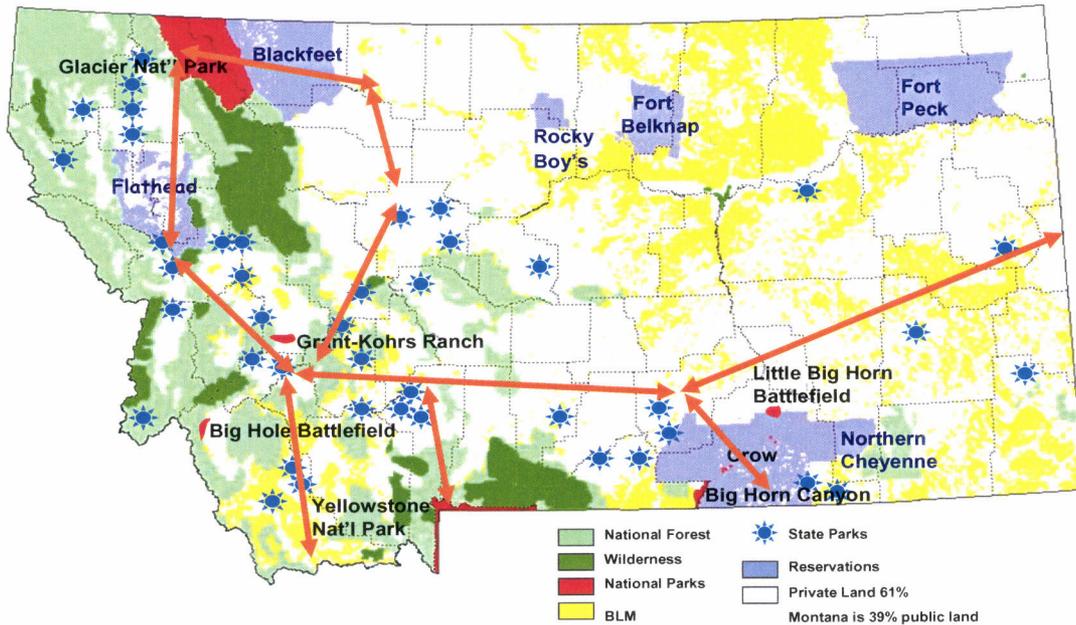
Prepared for Montana's Tourism & Recreation  
Partnership Stakeholders

## Main Travel Corridors of Nonresident Vacation Travelers in Montana, 2005

Source: University of Montana Institute for Tourism and Recreation Research, December 2007



## Montana's Public Lands



The most popular travel corridors of nonresident Vacation Travelers in Montana traverse the interstate highways, largest population centers, and routes to and from national parks.

# Montana Tourism and Recreation Strategic Plan 2008-2012

*Montana creates a special connection with just about everyone who experiences her pristine waters, wide open prairies, abundant wildlife, and majestic mountains. Those of us lucky enough to call Montana home feel this sense of place – the value of the Montana experience – every day. Protecting these special qualities while expanding opportunities for Montanans to sustain and improve their quality of life is the responsibility and the obligation of all of us who are the stewards of Big Sky Country.*

*I want to congratulate the 1,200 Montanans who helped create the Montana Tourism and Recreation Strategic Plan 2008-2012. It is a blueprint for action – a path to follow – offering ways to add value to the Montana experience for residents and visitors, alike. The plan sets high standards for tourism and recreation development and promotion which, when achieved, will deliver great economic and social benefits across the state.*

*By 2012, at the end of the path laid out in the plan, Montana's 10+ million visitors will be enjoying more Montana-made and grown products, they'll be sharing more of their wealth with Montana businesses and communities of all sizes, and those of us who are the stewards of this special place will have more resources to protect and enhance the cultural, historical and natural assets that we value – the parts of Montana that create that special connection within us all.*

*On behalf of the people of Montana, thank you to all the stakeholders who helped create this plan. My best wishes as you move forward, individually and collectively, on the path of action laid out inside these pages.*



Sincerely,

A handwritten signature in black ink that reads "Brian Schweitzer". The signature is stylized and cursive.

BRIAN SCHWEITZER  
Governor

Anthony J. Preite, Director, Montana Department of Commerce  
Betsy Baumgart, Administrator, Promotion Division (Travel Montana)

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Homer Staves, Staves Consulting  
Jan Stoddard, West Yellowstone Chamber  
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### Strategic Plan Cover Design

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[www.travelmontana.mt.gov/2008strategicplan/](http://www.travelmontana.mt.gov/2008strategicplan/)

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*All chapters and appendices of the Montana Tourism and Recreation Strategic Plan 2008-2012 are available online at: [www.travelmontana.mt.gov/2008strategicplan/](http://www.travelmontana.mt.gov/2008strategicplan/)*

### The Planning Team

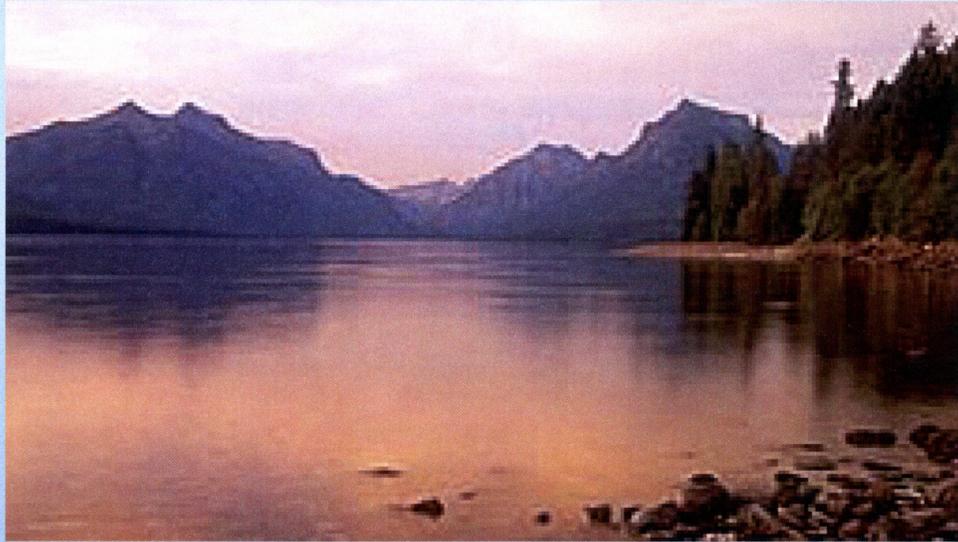


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**Executive Summary:  
Montana Tourism  
and Recreation  
Strategic Plan  
2008-2012**

## *Vision for Tourism and Recreation in Montana by 2012*

*It is the year 2012. Tourism and recreation in Montana have achieved the following:*

**Balance.** Tourism and recreation revenues continue to increase year-round. Montana's unique character and sense of place are retained while providing quality experiences for both residents and nonresident visitors. Montana's rich natural, historic and cultural assets are managed for sustainable levels of visitation in a manner consistent with responsible, shared use. Communities that desire tourism are benefiting from new revenue and jobs, while retaining their community integrity and heritage. Montana is known for its diverse, high quality natural, historic, and cultural tourism and recreation experiences, wide open spaces, abundant wildlife, and the friendly professionalism of its people.

**Cooperation.** Effective public-private-nonprofit-tribal partnerships are engaged in visionary, collaborative planning and implementation efforts which foster economic growth and stability, while respecting the values of Montanans. The private sector, community development organizations, supporting public agencies, and the nonprofit sector are working as a team, tapping limited resources more effectively through collaborative efforts.

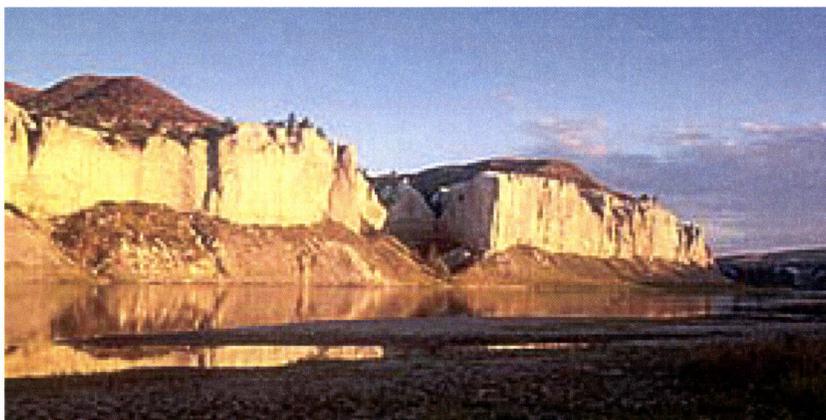
**Support.** Sufficient financial and technical assistance is available from various sources to support effective tourism marketing and research, management of natural, historic, and cultural assets, and business development. Tourism is integrated into Montana's education and workforce training systems. An adequate workforce is available to support the tourism and recreation industry, and there is affordable housing for the workforce. Stable funding sources that do not diminish tourism marketing funds are available to develop and maintain infrastructure for tourism and recreation needs.

**Respect.** Tourism is recognized as an essential element of Montana's economy. It is appreciated by Montana citizens, elected officials, and federal/state land management agency officials for its financial and social contributions to the state. Cities have been provided tools to cover the costs of impacts from tourism. Lasting legacies from major historical and cultural events such as the Lewis & Clark Bicentennial and the National Folk Festival in Butte continue to benefit Montana residents and provide ongoing opportunities for businesses and visitors.

**Accountability.** A comprehensive evaluation system is being used to measure the success and impacts of tourism and recreation development and marketing, consistent with the strategic goals. Information about visitation trends, impacts, and visitor research are widely distributed to provide businesses and agencies facts needed to make good management decisions, and to be responsive to changing customer tastes and preferences.

The Montana Tourism and Recreation Strategic Plan 2008-2012  
is available online at the Travel Montana intranet web site:  
[www.travelmontana.mt.gov/2008strategicplan/](http://www.travelmontana.mt.gov/2008strategicplan/)

For more information, contact Travel Montana at (406) 841-2870

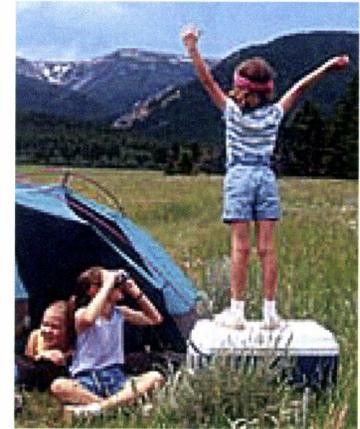


## Strategic Plan Purpose, Process, and Rationale

### The Strategic Plan Provides a Blueprint for Action

The purpose of this Strategic Plan is to:

- ◆ Serve as a blueprint for a strategic, integrated approach to tourism and recreation development and marketing in Montana.
- ◆ Confirm priorities to focus resources.
- ◆ Balance Montana's tourism promotion efforts, products, and partnerships.
- ◆ Assign responsibilities for implementation.
- ◆ Identify funding sources to pay for actions.
- ◆ Measure results and return on investment.



### Strategic Plan Addresses All Facets of Tourism and Recreation

This Strategic Plan is designed to be used by all organizations in Montana's tourism and recreation industry – private, public, tribal, and nonprofit. It is a plan that integrates tourism and recreation into Montana's economic and community development, resource management, conservation, and public policy efforts. It is a holistic view of tourism and recreation planning and implementation, addressing not only promotion, but also the product itself, and partnerships required for successful implementation.

### More than 1,200 Montanans Participated in the Planning Process

The strategic planning process began in October 2006, and was completed in December 2007. The process included extensive outreach and input from tourism and recreation businesses, public agencies, tribes, arts and historical organizations, farmers and ranchers, conservation groups, motorized recreation enthusiasts, sportsmen, and other interested members of the public. Through public workshops, interviews, a statewide survey, and the Governor's Conference on Tourism, more than 1,200 Montana citizens, businesses, and organization representatives provided input.

### 10+ Million Visitors Spend Nearly \$3 Billion Annually in Montana

In 2006, nonresident visitors spent \$2.9 billion in Montana, and tourism generated \$21+ million in state lodging and select sales taxes. These revenues support facilities and services that improve the quality of life in Montana. Total nonresident tourism expenditures doubled from 1995 to 2005, and the industry continues to grow at a healthy pace. **However, there is still much room for improvement:** in 2006, there were 4.6 million *vacant* hotel room nights statewide, primarily in the off-peak seasons.

### Tourism is the World's Largest Industry, Competition is Increasing

Despite steady growth, both the U.S. and Montana *lost* market share over the past five years among destination vacation travelers due to aggressive marketing efforts of emerging destinations. Fuel prices, the economy, and security concerns affect tourism, but specific sectors of the industry continue to see double-digit growth.

***In order to remain competitive, Montana needs to capitalize on its strengths (high quality outdoor experiences, clean air and water, authenticity, tribal culture, history, arts, and affordability), and address its weaknesses (lack of coordination and communication, lack of resources for asset management and marketing, workforce gaps, and transportation infrastructure needs).***

#### Strategic Plan Addresses "Big Picture" Questions:

- ◆ What lies ahead?
- ◆ What types of visitors will Montana serve?
- ◆ How is Montana different from its competition?
- ◆ What does success look like?
- ◆ How do Montanans protect what they value?

#### Strategic Plan Process Phases:

1. Information-gathering (Oct 2006-Mar 2007)
2. Refinement of strategies and actions (Feb-Apr 2007)
3. Draft Plan for public comment (May-Oct 2007)
4. Completion of final Strategic Plan (Oct-Dec 2007)

In 2006, there were 4.6 million *vacant* hotel room nights in Montana (representing \$309 million in lost potential lodging revenue, and \$21.7 million in lost tax revenue).

Montana's 2006 average daily hotel room rate (ADR) was \$68, compared to the national average ADR of \$96.



### What is "Geotourism"?

Geotourism is tourism that sustains or enhances the geographic character of the place being visited, including its environment, culture, heritage, landmarks, and the well-being of its residents. Geotourism seeks to build a relationship between traveler and destination, and between guest and host. Geotourists make up 55.1 million of the 154 million American travelers, about 36%.

### How Are Montana Lodging Taxes Allocated?

A 4% lodging tax in Montana supports state, regional, and local tourism efforts, as well as state parks, history, culture, trade, and community infrastructure and events. In fiscal year 2007, those funds were allocated as follows:

	Amount
Travel Montana	\$9,764,682
Regions/CVBs	3,705,415
Fish, Wildlife, Parks	1,041,564
MT Historical Society	681,803
Grants (TIIP, SEGP)	280,000
Univ. of MT - ITRR	400,602
Heritage Commission	400,000
MT Dept. of Revenue	386,646
MT Trade Program	150,000
<b>TOTAL FY07</b>	<b>\$16,810,711</b>

## The Strategic Plan Emphasizes Growth in Off-Peak Seasons, and Strengthened Capacity among Tourism Organizations

Half of Montana's visitor spending occurs in June through September. To enhance tourism sustainability, the Strategic Plan emphasizes maintaining summer performance while increasing off-peak season visitation through targeted promotions, an integrated visitor information system, and themed product development. Resources to create these results will come from increased state promotion funding, leveraging of private money, and enacting local tools like the Tourism Business Improvement District to bolster local marketing and professional development. Other key actions include public awareness of tourism benefits and impacts; sustainable management of natural, cultural and historic assets; and workforce training and housing.

## Highly Effective Targeting of Niche Markets like Geotourists – Highlighting Montana's Brand – is Critical to Competitiveness

Geotourists, particularly the "Geo-savvy" segment, are primary targets for Montana. These visitors share Montanans' appreciation of the state's culture, heritage, environment, and social well-being. Other niche markets suited to Montana include wildlife and bird watchers, photographers, scenic drivers, adventure travelers, sporting events, cultural and heritage travelers, to name a few. Consistent use of Montana's tourism brand will help reach more first time visitors. Once here, Montana exceeds visitor expectations and many, 83%, become repeat visitors.

## Tourism Strategic Framework and Actions

The strategic framework for the Montana Tourism and Recreation Strategic Plan consists of three main elements: Promotion, Product and Partnerships. The graphic below shows five key themes within each category. **Promotion** includes advertising, publicity, and other promotion activities targeting nonresident travelers, as well as awareness-building efforts targeting Montana residents and elected officials. **Product** refers to the natural, cultural, tribal, and historic assets of Montana that travelers wish to experience, along with the facilities and services provided by Montana's tourism and recreation businesses, tribes, and agencies. **Partnerships** are essential to implementation of the Strategic Plan, by leveraging resources, changing policies and procedures to increase effectiveness, and addressing challenges faced by the tourism and recreation industry.



## Tourism and Recreation Charter, Vision, and Goals

This Strategic Plan establishes high standards for sustainable tourism and recreation development across Montana from 2008 to 2012 and beyond. These standards were developed by analyzing tourism and recreation trends, current funding and marketing activities, and key target markets based on the vision, guiding principles, and goals identified by Montanans. Objectives and actions were created to achieve each goal, along with methods to measure results, and funding sources for implementation. The full Strategic Plan contains the details in six user-friendly chapters and appendices, available online at [www.travelmontana.mt.gov/2008strategicplan/](http://www.travelmontana.mt.gov/2008strategicplan/). For the first time, a Montana Tourism and Recreation Charter is included as part of the Strategic Plan.

### Montana Tourism and Recreation Charter\* Guides Tourism Policy

The Montana Tourism Advisory Council adopted the following policy principles:

- ◆ Maintain the integrity of place and destination appeal.
- ◆ Promote and highlight the businesses, services, and opportunities that are unique to Montana.
- ◆ Promote sustainable resource conservation, including conservation of energy, water, wildlife, and compatible land uses.
- ◆ Participate in and help lead community stewardship partnerships to maintain Montana assets.
- ◆ Identify and appeal to markets that value and seek to help sustain Montana's distinct character.
- ◆ Foster a diversity of products and services that meet the demand of a demographic cross-section of the "geotourist" market.
- ◆ Ensure visitor satisfaction and an enduring market demand through education of Montana residents about the benefits of sustainable tourism.
- ◆ Work with ITRR, Travel Montana, and other tourism organizations throughout the state to evaluate effective implementation of the Tourism Charter.

### Vision and Goals for 2008-2012 Focus on Results and Sustainability

The Vision for tourism and recreation in Montana focuses on balance, cooperation, support, respect, and accountability (see page ES-2). **To make the vision a reality, the Strategic Plan identifies ten goals to achieve by 2012:**

1. Increase four-season tourism revenues statewide through effective marketing and promotions, focusing on high-value, low-impact visitors.\*\*
2. Attain public policy and citizen support for sustainable tourism and recreation.
3. Address management and access issues for sustainable tourism and recreation on state and federal lands.
4. Enhance and preserve Montana's culture and history (historic sites, museums, art, music, etc.).
5. Support appropriate business growth, including new tourism products and services for target customer markets.
6. Address tourism and recreation professional development, workforce availability, and affordable housing issues.
7. Improve Montana's transportation system for both residents and visitors.
8. Enhance the "curb appeal" of Montana communities to attract visitors.
9. Enhance funding to maintain sustainable tourism and recreation in Montana.
10. Build an effective "team" to implement the Strategic Plan, and report results.

To attain each goal, specific actions and measurable objectives have been identified. A summary of the objectives and actions is contained on the following pages. Full details are included in Chapters 5 and 6 of the Strategic Plan (available online).



\* The Montana Tourism and Recreation Charter was written by the Montana Tourism Advisory Council, and adopted at its October 2007 meeting. The Charter is being circulated for acceptance and adoption by Montana's tourism and recreation partners and stakeholders. Chapter 4 of the Strategic Plan includes the entire Charter text.

#### Montana Ranks #9 in Affordability for Families

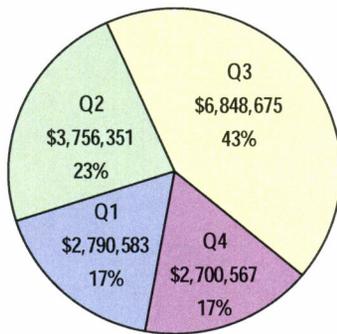
In 2007, the average lodging cost for a family of four in Montana was \$107.20 per day, and the average daily cost for meals was \$112.75, for a total of \$219.95 per day. Montana was 41<sup>st</sup> among the 50 states in the cost for family travel lodging and meals.

Source: AAA, Washington D.C.

\*\* "High-value, low-impact visitors" are defined as visitors who contribute to Montana's economic and social prosperity while respecting and appreciating Montana's authentic natural and cultural assets.

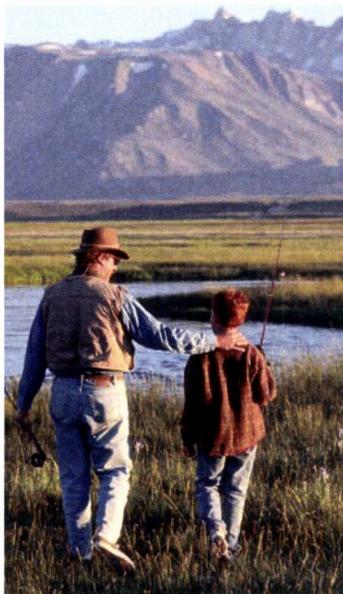
**2006 Lodging Facility Use Tax Collections by Quarter**

Source: MT Dept. of Revenue



Two-thirds of Montana lodging tax (66%) is collected from April through September (2<sup>nd</sup> & 3<sup>rd</sup> quarters). The Strategic Plan emphasizes the need to build off-peak season tourism business in the 1<sup>st</sup> and 4<sup>th</sup> quarters (October-March).

Moreover, 60% of all lodging sales take place in Montana's 11 communities with CVBs. These areas have year-round amenities and attractions, and should focus on off-peak season conferences and events. Development of niche market opportunities will help enhance tourism business and quality of life in rural areas.



## Objectives Measure Outcomes of Strategic Plan

Successful implementation of the actions in the Strategic Plan will achieve tangible results. Selected objectives to measure results are listed below and on the next page.

### Economic Objectives Target Revenue and Job Growth by 2012

- ◆ Increase lodging tax collections statewide by at least 6% per year, from \$16.1 million in 2006 to \$22.8 million in 2012, emphasizing off-peak seasons.
- ◆ Build by 15% nonresident visitation in off-peak seasons by 2012.
- ◆ Increase nonresident traveler expenditures by 20%, from \$2.9 billion in 2006 to \$3.5 billion in 2012.
- ◆ Raise state and local tax revenue generated by visitor spending by 4% per year.
- ◆ Improve statewide hotel occupancy rate from 59.5% in 2006 to at least 63% in 2012, as reported by Smith Travel Research, maintaining summer occupancy while focusing on growth in off-peak seasons.
- ◆ Boost average daily rate (ADR) in Montana hotels from 71% of U.S. average to 75% of U.S. average, estimated from \$68 in 2006 to \$82 by 2012, as reported by Smith Travel Research (national average in 2006 was \$96).
- ◆ Increase tourism and recreation-related jobs in Montana by 2% per year.
- ◆ Augment direct income generated by tourism and recreation by 7% per year.

### Marketing Objectives Focus on Partnerships and Booking Targets

- ◆ Leverage \$4 million in annual Travel Montana advertising expenditures into \$10+ million in media value.
- ◆ Generate at least \$500,000 in private sector investment participation in cooperative advertising and promotion efforts annually.
- ◆ Attract at least 50 new conferences or group gatherings of 100-150 people or more from outside Montana annually (average of 4 - 5 per CVB per year).
- ◆ Attract at least two new sports competitions to Montana annually.
- ◆ Host three to five media familiarization tours per region annually.
- ◆ Generate publicity worth an advertising equivalency of \$14 million annually.
- ◆ Generate six to ten new tour group trips annually.
- ◆ Increase new film industry expenditures by an average of 5% per year.
- ◆ Work with the executive branch and legislature to extend the Big Sky on the Big Screen film production incentives beyond 2009.

### Land and Facility Management Objectives Address Sustainability

- ◆ Change State law and rules in 2009 legislative session to broaden eligibility for the Montana Byways program (and access to federal funding).
- ◆ Address tourism and recreation policy issues through collaborative efforts between policy-makers, agencies, businesses, nonprofit organizations, tribes, etc.
- ◆ Incorporate responsible use messages and geotourism ethics into tourism marketing publications and web sites by 2009.
- ◆ Implement voluntary tourism-sponsored programs to provide funding for Montana open space preservation by 2009.
- ◆ Expand participation (enrolled acres) in the Montana Block Management Program to 9 million acres by 2012.
- ◆ Identify actions, initiatives, and funding sources to reconnect families and youth with the outdoors, and link outdoor programs with state curriculum standards.

## Cultural and Historic Preservation Objectives Support Geotourism

- ◆ Use historic and cultural facilities at least 50 times annually as venues for visiting conference groups (4+ per year per CVB).
- ◆ Identify at least two artisan/craftsman trails per region, with themes and art/craft/history/culture/tribal highlights along each, by 2010.
- ◆ Develop a comprehensive searchable online event calendar by December 2010.
- ◆ Implement cooperative marketing with the Montana Tribal Tourism Alliance.
- ◆ Complete interpretive enhancements to at least two facilities per region annually.
- ◆ Implement infrastructure improvements to at least one historic/cultural/tribal facility per region annually.
- ◆ Complete at least one assistance project annually in each of Montana's Main Street communities.



## Business and Workforce Objectives Address Private Sector Needs

- ◆ By 2009, all eleven Convention & Visitor Bureaus are members of national CVB trade associations, incorporating professional standards and booking targets.
- ◆ Adjust school/university calendars to facilitate tourism and recreation industry seasonal workforce needs by the 2010-2011 school year.
- ◆ Link visitors to Montana products: promote local foods, farmers markets, artisan shows, gallery tours, and other events that highlight local Montana products.
- ◆ Conduct at least four annual entrepreneurship trainings for tourism/recreation businesses and "Indian-preneurs".
- ◆ Offer enhanced services to visitors with new guided opportunities on public lands.
- ◆ Add at least four higher education degree-related and continuing education classes annually for tourism and recreation.
- ◆ Promote development incentives for affordable workforce housing, and increase the number of affordable housing units annually in targeted areas.

## Transportation and Community Objectives Improve Infrastructure

- ◆ Increase air service capacity to Montana cities.
- ◆ Create at least six Montana Amtrak tours, itineraries, and packages annually.
- ◆ Increase ridership on Montana tour trains by 5% annually.
- ◆ Identify opportunities to expand intercity transit service.
- ◆ Continue to expand the bike/pedestrian trail systems statewide by 2010.
- ◆ Increase community participation in the Montana Main Street Program.
- ◆ Continue state tourism infrastructure and special event grant programs.
- ◆ Plan workshops annually in each region for businesses and attractions about effective signage and alternatives to billboards.

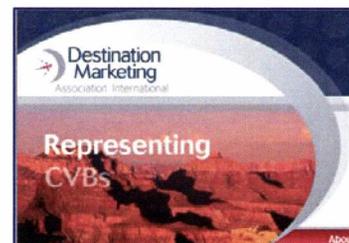
## Funding and Reporting Objectives Improve Competitiveness

- ◆ Enact changes in state funding during the 2009 legislative session to support increased tourism marketing and development.
- ◆ Increase private sector funding pooled with public dollars by 10% annually.
- ◆ Create Tourism Business Improvement Districts in at least 6 CVB areas by 2012.
- ◆ Conduct statewide nonresident traveler survey in 2010, and provide interim information about traveler trends between the 5-year traveler survey cycles.
- ◆ Track visitor usage at historic trail sites/facilities to understand visitor trends.
- ◆ Conduct annual Montana resident attitudes/opinions survey and distribute results.
- ◆ Distribute the Strategic Plan Annual Progress Report to the Tourism Advisory Council, Governor, Legislature, and industry stakeholders by January 30 annually.

### National Trends Fast Facts

- ◆ 1/4 of Americans visit national parks
- ◆ 1/5 visit national forests
- ◆ **Heritage/cultural tourism** is fastest-growing segment
- ◆ Downtown shopping districts preferred by more tourists (49%) than malls (27%) or department/box stores (26%)

Source: TIA



The **Destination Marketing Association International** ([www.iacvb.org](http://www.iacvb.org)) is a professional trade association for CVBs. It provides standards and accreditation for Bureaus and their professional staff, and represents nearly 500 CVBs in 30 countries. DMAI has a meeting and convention database that tracks records on more than 20,000 associations and corporate meetings, which is available to members.

## Successful Implementation Requires Strategic Action

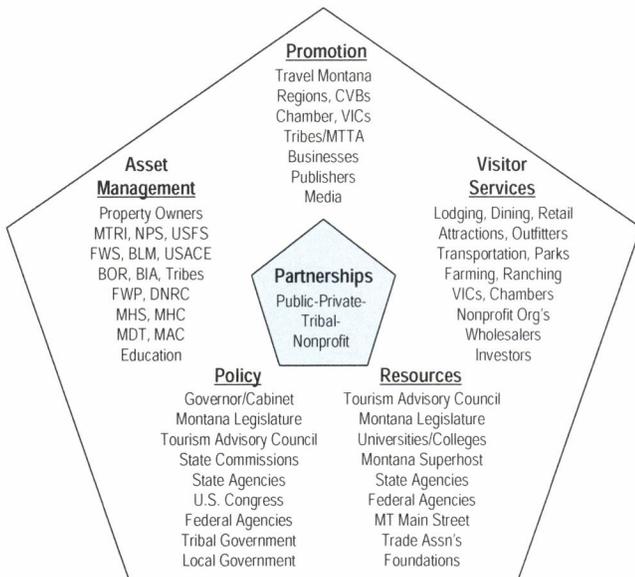
### Effective Public-Private-Nonprofit-Tribal Partnerships are Key

To implement the actions in the Strategic Plan effectively, people and organizations must work together. Implementation partners for the Strategic Plan include:

- ◆ Tourism and recreation-related businesses and business trade associations
- ◆ Elected and appointed officials
- ◆ State agencies, universities and colleges
- ◆ Tourism regions ("countries") and convention and visitor bureaus (CVBs)
- ◆ Tribal organizations
- ◆ Federal land and wildlife management agencies
- ◆ Montana Tourism & Recreation Initiative (MTRI)
- ◆ State and local nonprofit organizations



Tourism Strategic Plan Partners and Their Areas of Responsibility



To maintain a successful and sustainable tourism industry, these partners must understand each others' roles, and work toward a common vision. The figure at left shows how the implementation partner roles relate to each other:

- ◆ Policy-makers provide direction and authorization for activities to occur.
- ◆ Asset managers build, maintain, and/or protect Montana's assets.
- ◆ Visitor services provide products and services needed by visitors.
- ◆ Resource entities provide funding to implement strategic actions.
- ◆ Promotion partners relay tourism and recreation opportunities to niche markets.

As the figure shows, the focal point of success is partnerships to achieve the Plan's goals. Each of the partners plays a critical role in managing and enhancing tourism and recreation in Montana.

### Strategic Plan Contains 86 Actions to Implement over 5 Years

Working together, Montana's public, private, nonprofit, and tribal tourism and recreation partners will tackle 86 actions to achieve the ten goals. By spreading the responsibility among dozens of organizations, all partners can make progress. In so doing, they will increase the number of high value, low impact visitors in off-peak seasons, improve the economy year-round, and enhance the quality of life for Montanans. Visitors will enjoy more Montana products and services, visit more communities across the state, and spend more money to support jobs and help protect and enhance Montana's natural, cultural, and historic assets.



The Action Table on the next four pages provides a summary of the 86 actions, along with the priority level, timeline, and implementation partners for each action. Priorities are listed as "H", "M", or "L" for High, Medium or Low priority, and represented by shading: the darker the color, the higher the priority. An "MO" code in the timeline indicates a specific Measurable Objective due date for that action as defined in Chapter 5 of the Strategic Plan ([www.travelmontana.mt.gov/2008strategicplan/](http://www.travelmontana.mt.gov/2008strategicplan/)).

<b>Montana Tourism &amp; Recreation Action Table</b>		Priority	08	09	10	11	12	Lead	Partners
<b>Goal 1: Increase four-season tourism revenues statewide through effective marketing and promotions, focusing on high-value, low-impact visitors.</b>									
1.1	Implement highly targeted consumer advertising/promotion campaigns								
1.1.a	Expand partnerships with tourism businesses/attractions as co-op partners	H		MO				TM	REG, CVB, CC, BIZ, MTTA
1.1.b	Continue winter marketing, promoting Montana as a superb winter destination	H			MO			TM	MSAA, REG, CVB, BIZ, MTTA
1.1.c	Attend consumer travel shows targeting high value, low impact visitors	M						REG	CVB, BIZ, MTTA
1.1.d	Continue marketing to international travelers	M	MO					TM	REG, CVB, BIZ, MTTA
1.1.e	Enhance tracking/reporting and ROI from state, regional, and CVB advertising	H						TM	REG, CVB, ITRR, DOR
1.2	Promote Montana to target groups/events, emphasizing off-peak season activities								
1.2.a	Amplify targeted marketing to attract groups, meetings, and conferences	H						CVB	REG, TM, BIZ, UNIV, MTTA
1.2.b	Work with local sports groups to attract sport events in off-peak season	H						CVB	NPO, CC, BIZ, REG, TM, TRB
1.2.c	Continue to promote Montana as a film location; consider enhanced incentives	H		MO				TM	TIAM, MEDA
1.2.d	Target travel media to increase visibility of MT as a leisure travel destination	H						TM	CVB, REG, BIZ, MTTA
1.2.e	Continue to target tour operators to bring tours/packaged vacations to MT	H						TM	CVB, REG, BIZ, MTTA
1.3	Collaborate with tourism marketing partners to plan/implement priority marketing efforts								
1.3.a	Host an annual marketing plan meeting to coordinate the marketing planning process	H						TM	TAC, REG, CVB, FWP, MHS, MDT, MAC, MHC, NPS, USFS, BLM, FWS, COE, MTTA, TIAM, MSAA
1.3.b	Implement the new Montana tourism brand	H						TM	REG, CVB, BIZ, MTTA, DOAg, FWP, DOC, MHS, MAC, MHC, DNRC
1.3.c	Conduct educational tourism workshops, presentations, and webinars	M						TM	REG, CVB, CC, MTTA
1.3.d	Create cooperative marketing campaigns between agriculture and tourism	L						TM	DOAg, REG, NPO, BIZ, MTTA
1.4	Improve Montana's Visitor Information System to extend visitor stays and spending								
1.4.a	Create a database inventory of Visitor Information System elements statewide	H		MO				TM	REG, CVB, MTRI, MTTA
1.4.b	Establish criteria for officially-designated visitor information sites statewide	M			MO			TM	MTRI, MTTA, CC
1.4.c	Provide advanced training for all VICs, including regional familiarization tours	H						TM	MTRI, REG, CVB, CC, BIZ, MTTA
1.4.d	Use technology to enhance visitor information and marketing efforts	M						TM	MTRI, MTTA, CC
1.4.e	Expand displays of MT destinations/products at all visitor locations statewide	M		MO				TM	MDT, DOC, MTTA, BIZ, CC, NPO, MEDA
<b>Goal 2: Attain public policy and citizen support for sustainable tourism and recreation.</b>									
2.1	Build awareness about new Montana Tourism Charter, geotourism, & tourism benefits	H						TM	REG, CVB, MTRI, MTTA, TIAM
2.2	Give effective presentations to policy makers about Montana tourism issues/benefits	H						TM	REG, CVB, MTTA, CC, TIAM, MIKA, MEDA
2.3	Change state law and rules to broaden eligibility for the Montana Byways program	M		MO				SG	MDT, USFS, BLM, TRB, CC, TIAM, NPO, MEDA
2.4	Address policy issues of note through collaborative efforts with all stakeholders	M						TAC	MTRI, TM, WSTPC, SG, TIAM, MEDA, MTTA, TRB

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## Montana Tourism & Recreation Action Table

		Priority	08	09	10	11	12	Lead	Partners
<b>Goal 3: Address management and access issues for sustainable recreation on private, state, and federal lands.</b>									
3.1	Educate visitors, suppliers, residents about ethics and responsibilities on public/private lands	H	MO	MO				TM	MTRI, REG, CVB, BIZ
3.2	Coordinate statewide tourism marketing efforts to ensure consistency with land management	M						TM	REG, CVB, MTRI, CC
3.3	Support use of easements to maintain public access to state/federal recreation lands	M		MO				LG	SG, MTRI, LO, CC, TIAM
3.4	Continue to enhance the Montana Block Management Program, expanding public access	M				MO		FWP	SG, LO, BLM
3.5	Identify means to reconnect youth with the outdoors, linking to state curriculum standards	M						SG	MTRI, UNIV (Extension 4-H), TRB, LG, NPO, BIZ
<b>Goal 4: Enhance and preserve Montana's culture and history (historic sites, museums, art, music, etc.).</b>									
4.1 Promote existing historic/cultural assets for the enjoyment of residents and visitors									
4.1.a	Use historic/cultural attractions as venues for conferences, events, and seminars	H						CVB	REG, BIZ, MHS, MHC, MAC, TM, MTTA
4.1.b	Develop artisan/craftsmen trails statewide to highlight history and culture	M		MO	MO			DOC	TM, MAC, MHS, UNIV, MTTA, REG, NPO
4.1.c	Enhance the state online calendar of arts/cultural/historic events	H		MO				TM	
4.1.d	Enhance MTTA and its marketing efforts	H						MTTA	TRB, MIBA, TM, REG
4.1.e	Plan and promote commemorations of historic events in Montana	M		MO	MO			MHS	TM, MTRI, REG, CVB, NPO, BIZ, CC, TRB
4.2 Improve/maintain infrastructure, facilities and services to support heritage/cultural tourism									
4.2.a	Enhance the interactivity/quality of interpretive displays, programs, and facilities	H						MHS	MAC, FWP, NPS, USFS, COE, BOR, BLM, FWS, TRB, NPO
4.2.b	Augment tourism facilities/services & marketing on Montana Indian reservations	H						TRB	MTTA, TM, BIZ
4.2.c	Improve infrastructure at historic/cultural sites to expand visitation and seasons	M	MO					MHS	MHC, MTRI, NPS, FWP, TRB, MTTA, LG, TM (TIIP)
4.2.d	Revitalize historic downtowns as vibrant destinations for travelers	H						MHS	MMS, CC, BIZ
4.2.e	Maintain the Lewis & Clark Trail, other national trails, and related sites	H						NPS	MTRI, LO, TM
4.3 Continue efforts to preserve Montana tribal culture (stories, arts, language, etc.)									
4.3.a	Identify tribal fine arts, museums, etc. that create opportunities to learn/observe	H						MTTA	TRB, MIBA, MHS, MAC, DOC
4.3.b	Continue cultural site inventory on public lands and establish appropriate access	M						USFS	BLM, COE, FWS, NPS, BOR, DNRC, FWP, TRB
<b>Goal 5: Support appropriate tourism business growth, including new tourism products and services for target customer markets.</b>									
5.1 Cultivate opportunities to leverage private/public funds to create tourism products									
5.1.a	Create vacation packages/itineraries for off-peak season niche markets	M						BIZ	REG, CVB, TM, MTTA
5.1.b	Expand winter tourism products/activities (spas, arts/culture, tribal events, etc.)	M						BIZ	REG, CVB, TRB
5.1.c	Encourage use of Made/Grown-in-MT products by restaurants, markets, retailers, etc.	M						DOC	DOAG, BIZ, REG, CVB, TRB, EDO
5.1.d	Identify new opportunities for guided visitor services on public/private lands	M						FWP	USFS, NPS, BLM, FWS, LO, BIZ, REG

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<b>Montana Tourism &amp; Recreation Action Table</b>		Priority	08	09	10	11	12	Lead	Partners
5.2	Provide information about technical/financial assistance available to tourism businesses								
5.2.a	Distribute assistance information via tourism meetings, web sites, newsletters, etc.	M						TM	REG, CVB, SBDC, TRB, MTTA, EDO, NPO
5.2.b	Conduct entrepreneurship training for tourism businesses & "Indian-preneurs"	H						MTTA	SBDC, TRB, MIBA, BIA
<b>Goal 6: Address tourism and recreation professional development, workforce availability, training, and affordable housing issues.</b>									
6.1	Enhance professional development opportunities/requirements for tourism organizations								
6.1.a	Encourage all MT CVBs to join DMAI or WACVB trade associations, adopt standards	H	MO	MO	MO	MO		CVB	TAC
6.1.b	Sponsor training for staff/volunteer board members of nonprofit tourism, recreation, historic, and cultural organizations and agencies	H						REG	TM, MHS, MAC, MHC, NPS, USFS, FWS, COE, FWP, MMS, MTTA, MNA
6.1.c	Enhance higher education programs for tourism/recreation careers	M	MO	MO				UNIV	MTRI, BIZ, NPO, MTTA
6.1.d	Provide MT Superhost program with advanced training, customized info, etc.	M	MO	MO	MO			UNIV	TM, TAC, BIZ, MTRI
6.2	Improve systems to augment Montana's seasonal workforce for tourism and recreation								
6.2.a	Add Tourism/Recreation/Hospitality categories to MT DLJ job search web site	H	MO					DLI	MTRI, TM, BIZ
6.2.b	Increase seasonal workforce with volunteers and volun-tourists	M	MO					FWP	MHS, MHC, DLI, USFS, NPS, FWS, BOR, BLM, TRB, CC, TM
6.2.c	Provide recognition awards for groups who volunteer for tourism/recreation projects	M		MO				MTRI	MTTA, TM
6.2.d	Adjust MT school calendars to facilitate tourism/recreation seasonal workforce needs	H			MO	MO		TAC	MT Board of Regents/Board of Education
6.3	Encourage use of local incentives and federal funds for affordable workforce housing	M						LG	BIZ, CC, NPO, HUD, USDA, TRB
<b>Goal 7: Improve Montana's transportation system for both residents and visitors.</b>									
7.1	Increase air service capacity to and from Montana cities	H						MDT	EDO, CVB, LG, BIZ
7.2	Continue to implement Montana's rest area strategy	M						MDT	TM
7.3	Improve and maintain Montana roads and bridges	M						MDT	SG, LG, TRB
7.4	Increase use of passenger rail and transit service in Montana								
7.4.a	Promote Amtrak's Empire Builder service in Montana	M		MO				MDT	LG, BIZ, CC
7.4.b	Promote excursion rail service in Montana	L						CC	BIZ, LG, NPO, MDT
7.4.c	Encourage/expand intercity transit service to high traffic visitor locations	M						MDT	LG, NPS, BIZ, CC
7.5	Expand bike/pedestrian trail systems among communities, and connections to trailheads	M			MO			NPO	MDT, FWP, USFS, FWS, BLM, TRB, LG, BIZ, LO
7.6	Develop a user-friendly handbook of information about the highway signing process	M		MO	MO			MDT	TM, LG, TRB, BIZ, MHS, MTRI

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**Montana Tourism & Recreation Action Table**

	Priority	08	09	10	11	12	Lead	Partners
<b>Goal 8: Enhance the "curb appeal" of Montana communities to attract visitors.</b>								
8.1	Increase the capacity of Montana communities to be more competitive in tourism							
8.1.a	H	MO	MO				TM	ITRR, UNIV, MMS, LG
8.1.b	H						MMS	SG, LG, EDO, BIZ, MHS, MAC, UNIV, MDT, TM
8.1.c	H			MO			LG	TRB, EDO, CC, BIZ
8.1.d	H						TM	TAC, LG, UNIV
8.2	Implement improvements to make Montana communities more visitor-friendly							
8.2.a	H						LG	TRB, EDO, CC, BIZ
8.2.b	H	MO					MDT	REG, LG, CC, BIZ, LO
8.2.c	M						LG	CC, BIZ, TRB, EDO
8.2.d	M						MEDA	DOC, CC, BIZ, SG, LG
8.2.e	M		MO		MO		MDT	DOC, SG, LG, BIZ, CC, COAM
<b>Goal 9: Increase funding to maintain sustainable tourism and recreation.</b>								
9.1	H		MO				SG	TAC, REG, CVB, BIZ, TIAM, MEDA, NPO
9.2	H						REG	CVB, TM, TAC, CC, BIZ
9.3	H				MO		CVB	REG, TM
9.4	H						MHS	MAC, NPS, USFS, FWP, MTRI, BIZ
<b>Goal 10: Build an effective "team" to implement the Strategic Plan, and report results.</b>								
10.1	H						TM	ALL
10.2	H						TM	ALL
10.3	Implement Strategic Plan discussion/reporting to align activities with goals and actions							
10.3.a	H						TM	ALL
10.3.b	H						TM	TAC, REG, CVB, MTRI, MTTA, NPO
10.3.c	H	MO					TM	ALL
10.4	H	MO					TM	TAC, SG, REG, CVB
10.5	Streamline reporting process of marketing plans/expenditures to TAC/TM by regions & CVBs							
10.5	Obtain strategic research to inform tourism marketing, development, and policy decisions							
10.5.a	H		MO				ITRR	TAC, REG, CVB, MTRI, BIZ
10.5.b	H						TM	ITRR, TAC
10.5.c	H						ITRR	REG, CVB, MTRI, BIZ
10.5.d	H						ITRR	TM, REG, CVB, TIAM, MIKA, MOGA, COAM

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