

Multi-state Tourism Entrepreneurship Project

Implemented by IHS Global Insight and
Great Destination Strategies

Task 5 Deliverable: Final Multi-state Regional Tourism
Study and Plan

September 12, 2012



About this Report

- This document represents the Final Multi-state Regional Tourism Study and Plan.
- The Multi-state Tourism Entrepreneurship Project is being largely funded by the US Department of Commerce, Economic Development Administration; it is being guided by a Steering Committee comprised of tourism leaders from throughout the region.
- During this project the Consulting Team engaged the region's stakeholders on several occasions in an examination of the potential for strengthening tourism in general and tourism entrepreneurship specifically within the designated region.
- The study has been underway for approximately eight months out of a total study period of twelve months.
- The purpose of this report is to summarize the work performed to date, and also to integrate the key analytic and process results into a coherent multi-state regional tourism development strategy and action plan.
- "Regional Tourism Model Spotlights" are interspersed in Chapters 5 and 6 to highlight how other region tourism development efforts have adopted elements of the Consulting Team's proposed approach and strategic recommendations.
(Please refer to the Report Outline on the following slide)



Report Outline

1. Project Overview
2. Project Schedule and Activities
3. Situational Analysis
4. Cooperative Tourism Strategy Development
5. Recommended Approach
6. Strategic Recommendations
7. Implementation Action Plan and Next Steps
8. Annexes
 - Annex 1: Complete List of Tourist Resources and Assets Identified Related to Story Sets
 - Annex 2: Comprehensive List of Relevant Institutions Organizations that could have Important Roles in the Implementation Process

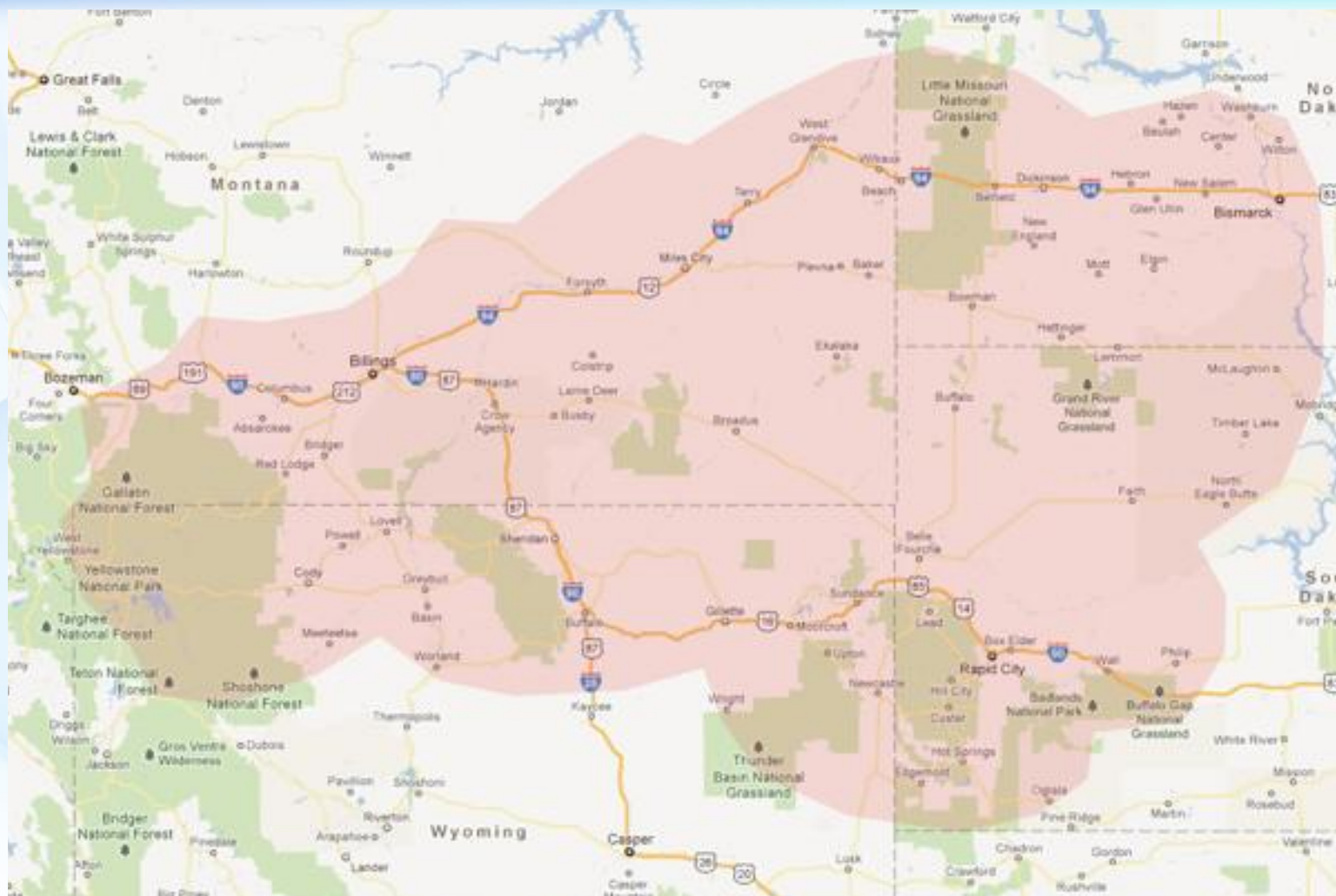
1. PROJECT OVERVIEW



1. Project Overview

- The Multi-state Regional Tourism Entrepreneurship Project is a year-long effort focused on stimulating entrepreneurship in tourism-related businesses in the four state region generally extending from Billings, Montana, east to Medora, North Dakota, then south to the Black Hills of South Dakota, and then west to Cody, Wyoming.
- The project seeks to engage the region's stakeholders in an examination of the potential for strengthening tourism entrepreneurship and to work collaboratively with local actors to identify and implement concrete actions that can more effectively leverage the region's tourism potential.
- The Multi-state Regional Tourism Entrepreneurship Project is being funded by a number of private and public entities from the four states including the Economic Development Administration with matching funds committed in the form of cash or in-kind resources from several other organizations and public agencies associated with the region.

Rough Map of Project Boundaries



Structure of the Project

Funded by private & public entities from the 4 states including the U.S. Economic Development Administration with matching funds committed from many regional organizations & agencies



Guided by a Steering Committee comprised of key tourism leaders from the 4-state region



Managed by a Consulting Team from IHS Global Insight and Great Destination Strategies



Ultimately ***led by local champions*** who will drive specific projects & opportunities

Steering Committee

NORTH DAKOTA

- Rod Landblom, Roosevelt Custer Regional Council
- Dean Ihla, North Dakota Department of Commerce - Tourism Division

MONTANA

- Chris Mehus, Beartooth RC&D
- Victor Bjornberg, Montana State Tourism

WYOMING

- Linda Harris, Northeast Wyoming Economic Development Coalition
- Melinda Johnson, Wyoming Business Council
- Angela Jarvis, Buffalo Chamber of Commerce

SOUTH DAKOTA

- Kirk Hulstein, South Dakota Department of Tourism
- Nort Johnson, Black Hills, Badlands, and Lakes Association

TRIBAL REPRESENTATIVES

- Jackie Yellowtail, Apsaalooke Nation Tourism--Garryowen, MT
- Clara Caulfield, Northern Cheyenne Tribe--Lame Deer, Montana
- Barbara Schmitt, Economic Dev. Director, United Tribes Technical College

EDA

- John Rogers, Economic Development Administration
- Beverly Fischer, Denver Regional Office, EDA

The Consulting Team



IHS Global Insight — the global leader in economic and financial analysis, forecasting and marketing intelligence. IHS Global Insight's Economic Strategy Solutions group (ESS) has considerable experience in designing and implementing action-oriented regional economic development strategies. This experience includes more than 30 projects in the U.S. and another 25 around the world, including regional tourism development initiatives in Alaska, in Marin and Monterey Counties (California) as well as internationally in Argentina, Belize, Bosnia, Brazil, Chile and Turkey (among others).



Great Destination Strategies —provides a broad spectrum of branding, product development and marketing consulting services for downtowns, cities, counties, regions, countries, and special places. GDS offers a comprehensive and customized approach to helping communities and destinations improve or create their identities, develop products that support their brands, and market themselves both internally and externally.

Consulting Team Approach: Apply Proven Tools to Develop Specific Opportunities at the Regional Level



- Specialized economic analysis to uncover opportunities for entrepreneurship and economic development
- Mobilization of key stakeholders (i.e. public, private and academic leaders) to design and implement sharply tailored economic development strategies
- Bring “best practices” and “lessons learned” from successful regional tourism development efforts in other places
- Provide a new way for stakeholders to look at what they have in the region, and how best to leverage it
- Strategies designed for implementation—we do not just produce reports

2. PROJECT SCHEDULE AND ACTIVITIES

Project Timeline

December 2011 – February 2012: Reviewed existing reports, meetings with Steering Committee, interviews with stakeholders, consultants visit region to conduct situational analysis

April 2012: Cooperative Tourism Strategy Development - Regional stakeholder meetings

May 2012: Consulting team develops preliminary recommendations, findings, & proposed implementation plan

May – August 2012: Interactive strategy development

September 2012: Project conclusion & proposed launch event for implementation activities

2. Project Activities

- **Task 1: Project Start-up, Communications and Networking**
 - 1.1: Kick-off Meeting and Coordination with Beartooth RC&D
 - 3 Steering Committee Conference Calls - 12/13/11, 1/5/12, 1/30/12
 - Kick-off meeting held on 2/6/12
 - 1.2: Meet State/Regional Tourism Agencies and Tribal, State/Local ED Agencies
 - Meetings held during initial site visit - 2/6-10/12
- **Task 2: Data Collection and Technical Analysis**
 - 2.1: Collect and Analyze Existing Data
 - Consulting Team reviewed over 30 relevant reports and data sources
 - 2.2: Tourism Sector Evaluation
 - During initial site visit - 2/6-10/12, Consulting Team evaluated:
 - Tourist resources and assets
 - Linkages between regional actors/organizations
 - National and international trends relevant to the region
 - Potential linkages/ themes/niches relevant to the region
 - Issues impacting tourism entrepreneurship
 - Potential opportunities in tourism entrepreneurship development
 - Opportunities to add value and economic benefit for communities engaged in tourism
 - Potential resources for enhancing tourism
 - 2.3: Stakeholder Engagement
 - Consulting Team met with over 100 stakeholders during initial site visit - 2/6-10/12
 - 2.4: Analysis of Relevant Tourism Trends
 - Based on early findings, Consulting Team has begun to identify and analyze tourism trends relevant to the project region
 - 2.5: Draft Potential for Cooperative Tourism Development Opportunities Mid-Point Report
 - Task 1/2 Deliverable submitted on February 23, 2012

2. Project Activities

- **Task 3: Cooperative Tourism Strategy Development**
 - Stakeholder meetings were held in the region from April 17-19, 2012.
 - April 17, 2012: Miles City, MT
 - Miles Community College 1-5pm
 - April 18, 2012: Sheridan, WY
 - Sheridan County Court House 1-5pm
 - April 19, 2012: Rapid City, SD
 - Rapid City Visitors Information Center 1-5pm
 - Task 3 Deliverable submitted on May 21, 2012
- **Task 4: Draft Final Multi-state Regional Tourism Study and Plan**
 - First draft of Multi-state Regional Tourism Study and Plan submitted on June 11, 2012
 - Convened Steering Committee Webinar on June 19, 2012 to review and discuss Draft Final Report, overarching approach, specific recommendations and next steps.
 - Second Draft of Multi-state Regional Tourism Study and Plan submitted on August 1, 2012
- **Task 5: Final Multi-state Regional Tourism Study and Plan**
 - Final Multi-state Regional Tourism Study and Plan submitted on September 12, 2012

3. SITUATIONAL ANALYSIS

Key Questions for Situational Analysis:

Asset Review and Analysis

- What are the region's key assets and what are the existing linkages between assets?
- What are the opportunities for tourism development?
- What are the gaps?

Climate for Entrepreneurship Analysis

- What is the overall business climate for tourism entrepreneurship?
- What are specific entrepreneurial/ product development opportunities?
- What are the gaps?
- What specific interventions could improve the climate for entrepreneurship?

Collaborative Strategy Development Analysis

- How can the various tourism regions most effectively collaborate and link their assets together?
- How can the various regions' institutional infrastructure most effectively improve the climate for entrepreneurship?

Analysis of Existing Data: Visitor Motivation

- According to recent market research*, culture and history are 3 of the top 5 primary motivations for inbound tourism to the region suggesting that these are some of the multi-state region's most compelling attributes
- Other factors influencing visitor motivation identified by Mercury CSC include:
 - Local, historical information
 - Consistency in service, hospitality, signage

Mean Scores for Factors Influencing Selection of Travel to Custer Country



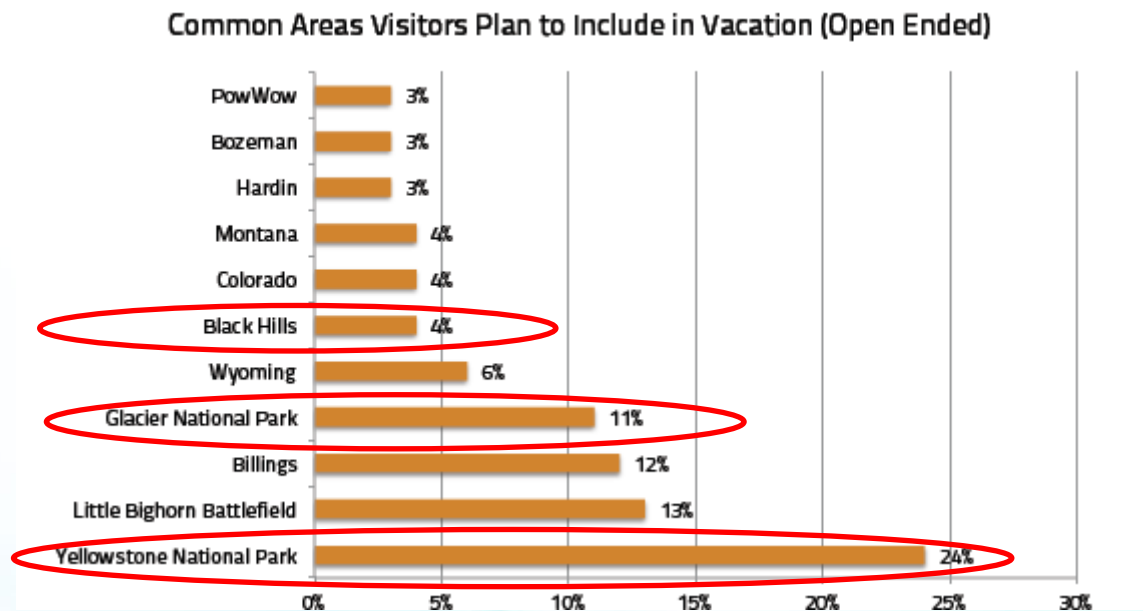
Source: Mercury CSC, "Custer Country Research Summit Presentation." January 5, 2012, Miles City, MT

* NOTE: The Consulting Team reviewed over 30 reports and data sources. For the purposes of this deliverable, the Consulting Team has used recent research conducted by Mercury CSC on Southeast Montana as a proxy for the four state project region.

Analysis of Existing Data: Proximity to Established Tourism Destinations is Important for the Region's Tourism Sector



- Anchor tourism destinations outside of the focus region are important lures
 - Yellowstone is part of vacation for 24%, Glacier 11%, Black Hills* 4%
- Several interviewees perceived Glacier, Black Hills and Yellowstone regions as “competitors”
- Rather than perceiving these regions as competition, it is important to identify how best to leverage proximity to these established destinations

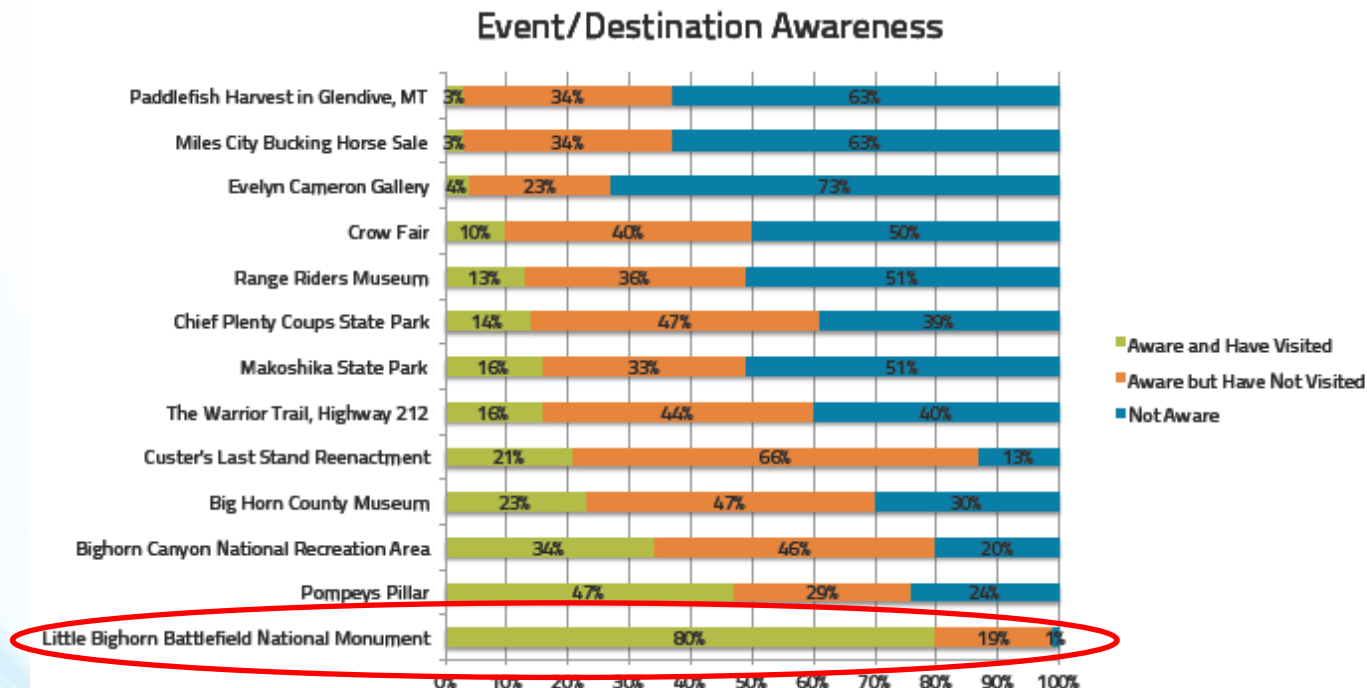


Source: Mercury CSC, “Custer Country Research Summit Presentation.”
January 5, 2012, Miles City, MT

* NOTE: intentions are skewed due to one source of the survey. Black Hill's intention is understated and would be higher if visitors to all of the project region were surveyed.

Analysis of Existing Data: Little Bighorn Battlefield is the Main Lure within the Interior Part of the Region

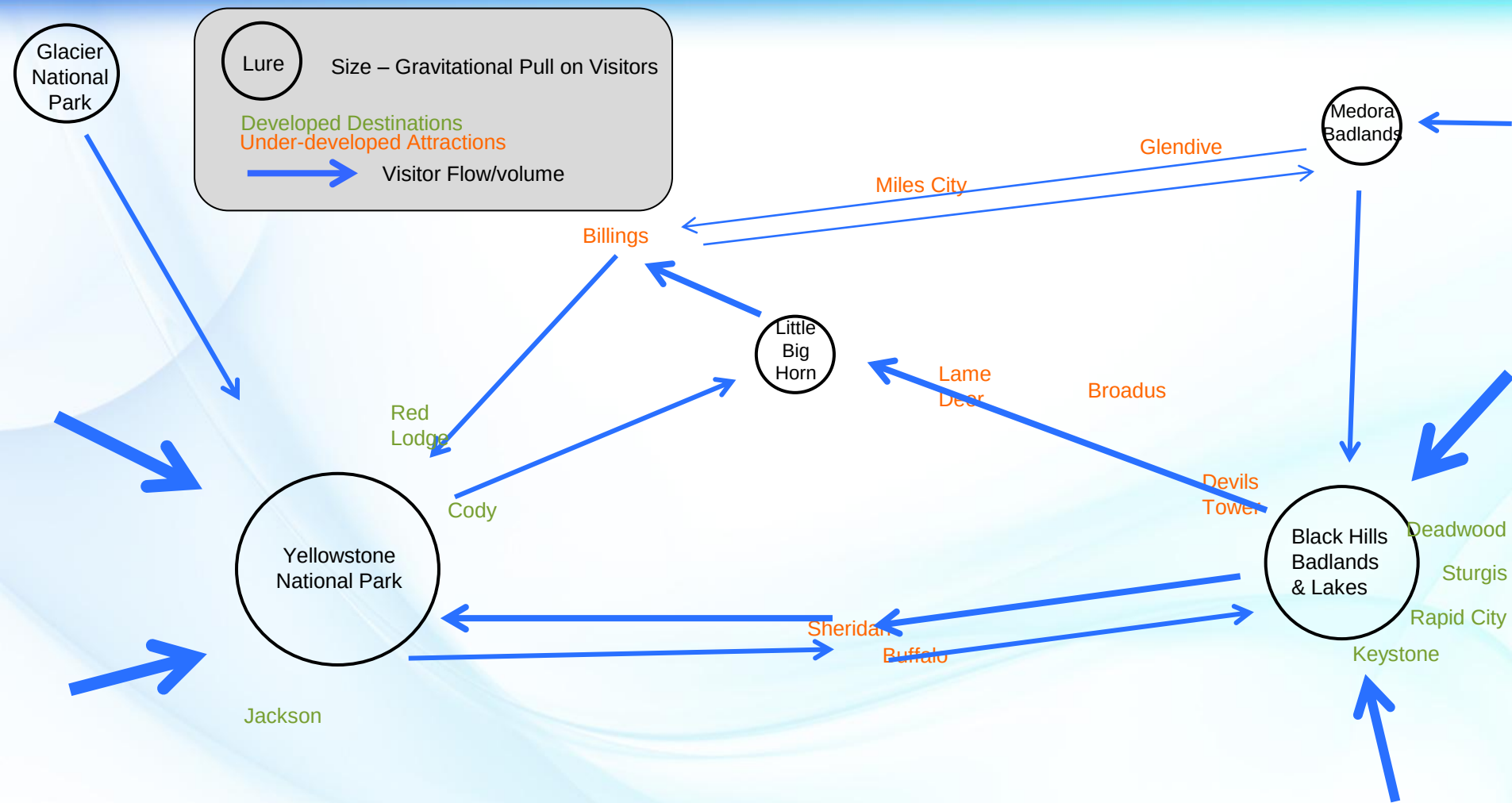
- In fact, over 300,000 people visited the National Monument in 2010*
- And yet results of initial site visit indicate that the tourism offerings close to the monument are largely underdeveloped; the surrounding region and its tourism actors are not sufficiently leveraging this significant visitation
- Mercury CSC's research supports this finding stressing the importance of "honing in on key icons"



Source: Mercury CSC, "Custer Country Research Summit Presentation."
January 5, 2012, Miles City, MT

*Source: Friends Of The Little Bighorn Battlefield
<http://www.friendslittalebighorn.com/superintendentssmessage.htm>

Preliminary Analysis of Regional Lures and Inbound Visitor Flows



- Rather than producing a “laundry list” of early observations impacting tourism entrepreneurship, the Consulting Team organized early observations into the following domain areas to permit stakeholders and decision-makers alike to better consider these issues strategically and ultimately, allocate scarce resources more efficiently:
 - Collaborative Strategy Development
 - Product Development
 - Human Resources /Workforce
 - Access to Finance
 - Access to Technology
 - Marketing
 - Business Climate
 - Physical Infrastructure

Summary of Priority Critical Issues Identified

◆ Collaborative Strategy Development

- Collective sense of place binding the multi-state region is in incipient stage not marketed as a multi-state region, Neighboring states are often perceived as competition
- Collaboration is occurring between actors in a variety of sub-regions, but not a lot of meaningful linkages across state boundaries

◆ Product development

- Several key tourism locations suffer from insufficient critical mass, overreliance on volunteerism, and non-profit organization support rather than private sector entrepreneurship
- Lack of loop tours/structured cross border itineraries--Complementary assets/ products loosely connected, if at all
- Too few experiential, interactive product offerings in the region to attract visitors in transit between major lures

◆ Access to Finance

- Limited availability of capital for start-up ventures
- Lack of sophistication in creating business plans (There are examples of reportedly successful business support programs (e.g., Forward Cody's *Business Boot Camp* program & Big Sky EDA's *NxLevel™ for Entrepreneurs* program)

◆ Access to Technology

- Navigational tools/mobile apps underdeveloped and/or not integrated across multi-state region
- Little social media integration related to tourism across states
- Some reluctance among tourism actors to adopt new technologies

Summary of Priority Critical Issues Identified (cntd.)

◆ Human Resources/ Workforce

- Consistency/dependability issues with professionalism of services, food/beverage, lodging ,etc. make it difficult to forge long-term mutually beneficial partnerships
- High turnover

◆ Marketing

- Multiple, sometimes overlapping marketing initiatives
- Marketing typically bound by jurisdictional boundaries, not integrated with the broader region's other tourism assets and attractions
- Some reliance on passive marketing (billboards, websites etc.)

◆ Business Climate

- Gasoline price impacts vehicular travel
- Energy resource extraction industry has socioeconomic impact on service sectors, especially tourism (i.e. Increased truck traffic on highways, Higher costs for supplies/ labor, Image problems, Capacity/labor competition)

◆ Physical Infrastructure

- Wayfinding: navigational signage is inadequate in parts of the region, often does not present points of historical/cultural importance
- Lodging a constraint in several sub-regions (e.g. Broadus, Lovell, Little Bighorn, etc.)...and further exacerbated by North Dakota's Bakken oil field development

Key Takeaway: Thematic Story Sets are the Connective Tissue that Binds the Region Together



- Unlike some other tourism regions that are bound together by roads, joint marketing campaigns etc., ***the project region is bound together by equally powerful shared stories, history and culture.***
- Although a collective sense of place binding the multi-state region is in its incipient stage and the tourism product is underdeveloped in several sub-regions, ***the region is richly endowed with assets of important cultural and historical significance and these thematic story sets are what tie together these physical assets and the tourism sector actors affiliated with these assets.***

"This region is about living history"



Key Takeaway: Thematic Story Sets are the Connective Tissue that Binds the Region Together



- These unifying (and sometimes overlapping and mutually reinforcing) thematic story sets include (among others):
 - Cowboys/Wild West history and culture
 - Native American history and culture
 - Pioneer/settlers history
 - Historical battle sites
 - Dinosaurs
- Yet to date, these multi-state thematic story sets have not been captured in a tangible way that can be effectively communicated, promoted and delivered to the end consumer.

"There is a critical mass of history, culture, nature (i.e. assets), but no critical mass of product"



Consulting Team Recommended Approach for Cooperative Tourism Development Activities



- The Consulting Team's recommended approach for cooperative tourism development involves organizing relevant tourism actors around these thematic story sets, identifying champions, fleshing out and developing the story sets and connecting the dots that link the various components of these story sets together. ***Entrepreneurs – especially those in remote settings, can make their offerings more visible, viable and relevant by linking to these story sets.***
- Once the story sets have been developed and champions identified, the Consulting Team would aim to integrate these story sets into the tourism offering in ways that are tangible both for tourism sector actors and the end consumers (e.g. wayfinding, loop tours, mobile phone apps, interactive websites, social media, etc.).
- Further, the existing situation in the project region calls out for employing 21st century tools for building community and enhancing connectivity. Existing social media platforms provide a useful methodology for creating a community of interest, enhancing connectivity and building out and continually updating and improving these multi-state thematic story sets.
- One of the key advantages of this kind of approach is that it is ***consumer-driven***, aiming to align how visitors plan and travel by making the region relevant to the end consumer.

4. COOPERATIVE TOURISM STRATEGY DEVELOPMENT

April 2012 Stakeholder Meetings

- During Task 3 the Consulting Team endeavored to use the results of the analytical exercises to engage local stakeholders in focused cooperative tourism strategic planning activities. Stakeholder meetings were held in the region from April 17-19, 2012:
 - April 17, 2012: Miles City, MT
 - Miles Community College 1-5pm
 - April 18, 2012: Sheridan, WY
 - Sheridan County Court House 1-5pm
 - April 19, 2012: Rapid City, SD
 - Rapid City Visitors Information Center 1-5pm



Meetings' Purpose: Answer the Following Questions

- Who are the **region's relevant tourism actors** in each of the thematic story sets? Who are the leaders?
- What are the **illustrative stories** that bind the region?
Who can tell them?
- How can we **better connect the dots** to link the various components of these story sets together?
- What kinds of tools, technologies, or resources are needed to **integrate these story sets** into the region's tourism offering in ways that are tangible for both tourism sector actors and the end consumers (e.g. wayfinding, loop tours, mobile phone apps, interactive websites, social media, etc.)?



Criteria for Story Path Development

Proposed:

- Creates a community of interest and **enhances connectivity across state boundaries**
- **Leverages existing resources** and channels them towards a **shared vision**
- Is developed in ways that can be **continually updated and improved**
- Is **market-driven**, aiming to align how visitors plan and travel by making the region relevant to the end consumer
- Provides opportunities for **commercially viable businesses** that will attract new resources to the region
- Is **tangible and feasible** for regional tourism sector actors

Suggested additions:

- **authenticity**-- true to the history/culture that we experience in our communities
- **accessibility** of the attraction – sensitivity to “off the beaten path”

Story Sets Developed*

- ① Cowboys/Wild West history and culture
- ② Native American history and culture
- ③ Dinosaurs/paleontology
- ④ Pioneer/settlers history
- ⑤ Historical battle sites
- ⑥ Wildlife (added on stakeholder request)
 - *Region can be viewed as “Serengeti of North America”*
 - *Birdwatching, equine activities, and other wildlife viewing opportunities are prevalent in 4 state region*

* A complete list of tourist resources and assets that were identified related to these story sets can be found in Annex 1



Themes that Could Be Added or Integrated

- Natural resources
 - Agri-tourism (e.g. working ranches, fresh food products)
 - Geology
 - Energy production (e.g. Campbell county coal)
- Recreation Activities (Build into all tours)
 - biking, fishing, rafting, boating, hunting, climbing, hiking

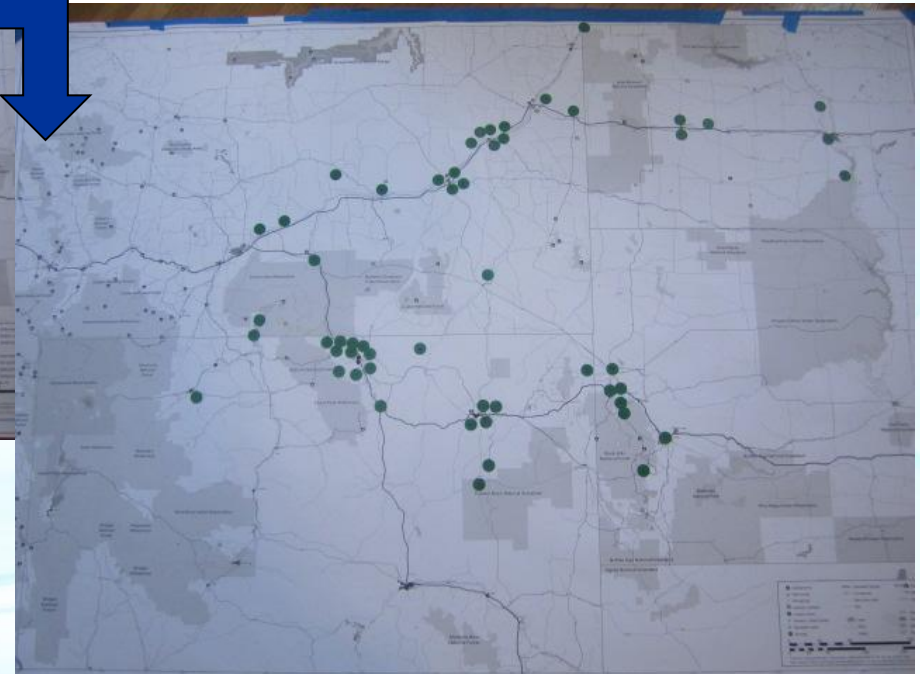
The Process



- 5 maps were posted at each of the 3 meetings
- Each map represented a specific “story” (i.e. wild west)



- Meeting participants were invited to share information about areas of interest throughout the region and mark them with stickers

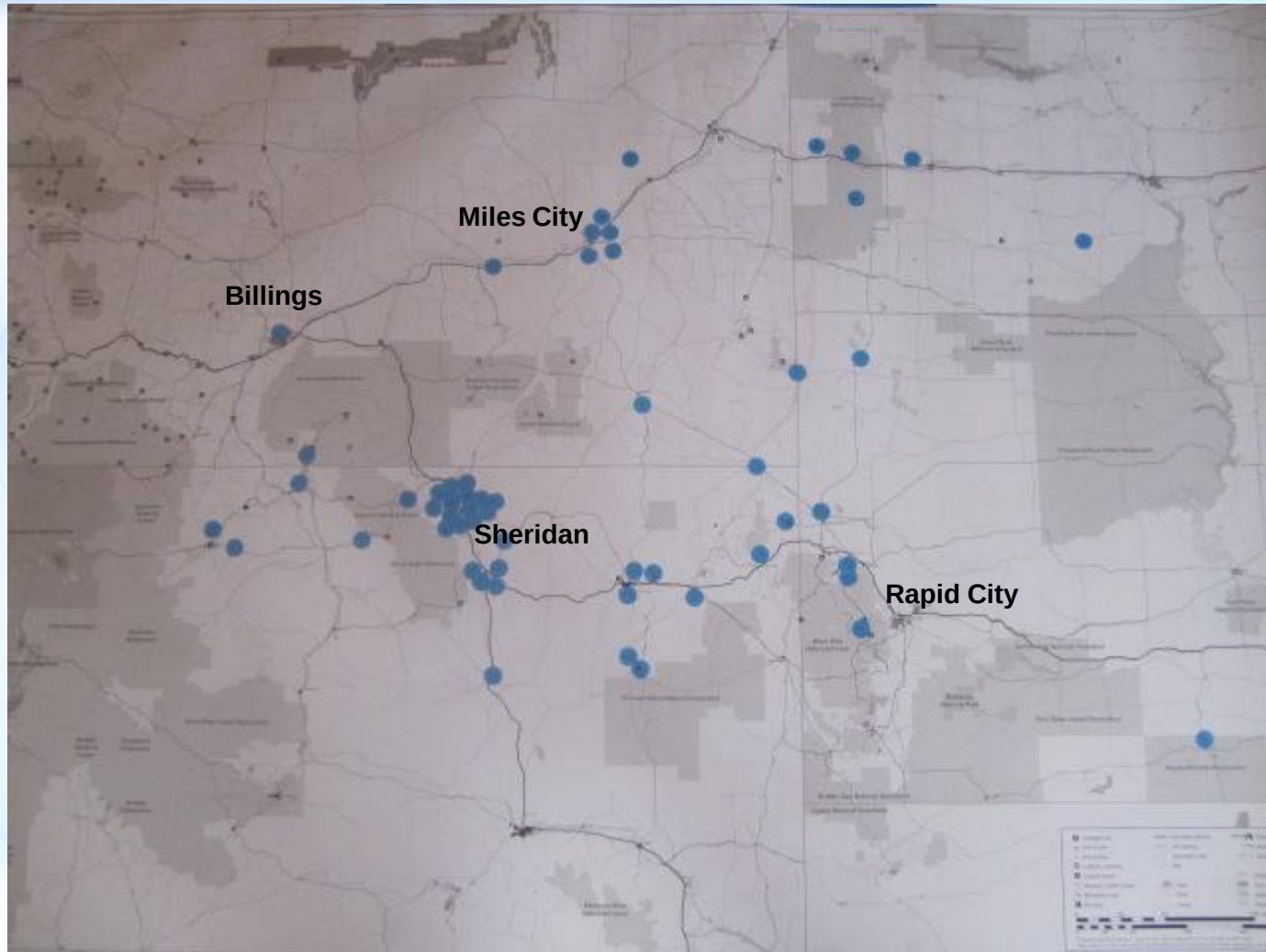




Story Set 1: Cowboys/Wild West and Culture

- Miles City added 18 sites and stories, including Miles City Bucking Horse Sale, Cody Museum/Night Rodeo, Black Hills Stage Coach/Wagon Train. Also noted the importance of the vigilante history and the role of women.
- Sheridan added 6 new sites including Hole in the wall—Butch Cassidy and the Durham Buffalo Ranch
- Rapid City added Deadwood stagecoach & trail ride, Belle Fourche, the Great American Trail
- Some stakeholders suggest broadening title to “western lifestyle experience” to include working ranches, horse activities, and agri-tourism
- A total of 55 sites, stories, and themes were gathered

End Result: Cowboys/Wild West History and Culture Map

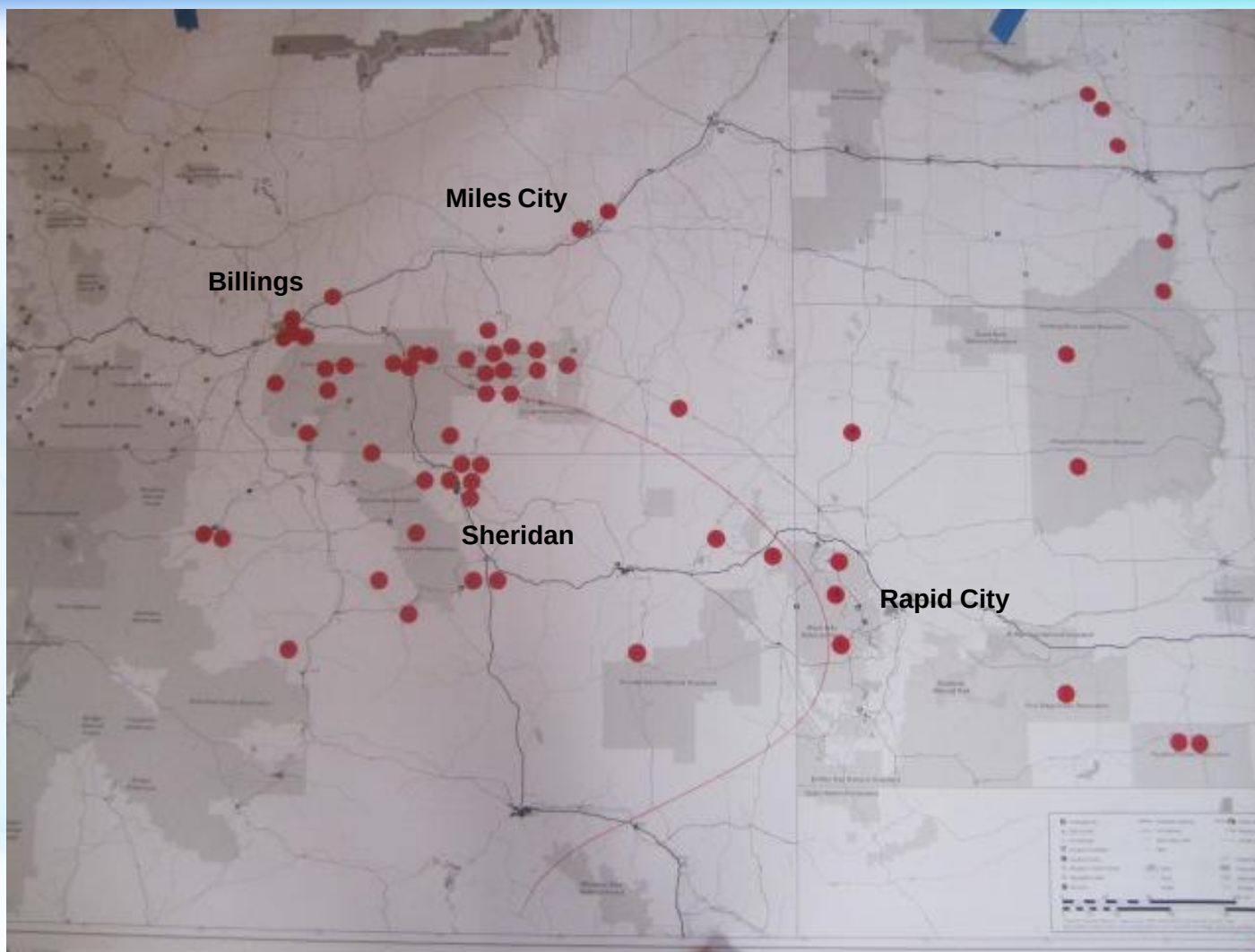




Story Set 2: Native American History and Culture

- Miles City identified 27 sites, stories, and events, noting the region's many pow-wows (of which the biggest is Crow Fair), Pictograph Caves south of Billings, Custer's Last Stand Reenactment, the Plains Indian Museum in Cody, WY, the Crow Agency Ultimate Warrior Race, and the Sitting Bull/Crazy Horse Camp near Miles City, MT
- Sheridan added new sites, including Tensleep, Medicine Wheel, and Standing Rock Sioux tribal activities
- Rapid City had more to add, including the Pawnee battle in downtown Mission, folklore associated with Fair Butte, Standing Rock and Bear Butte.
- A total of 54 sites, stories, and themes were gathered
- The Native American Development Corporation, Lydia Four Horns with REDCO, Jackie Yellowtail with the Apsaalooke Nation Tourism and Clara Caulfield with the Northern Cheyenne Tribe have significant history, stories, and information to add.

End Result: Native American History and Culture Map





Story Set 3: Dinosaurs/Paleontology

- Miles City identified 10 sites, including the “Dinosaur Trail” in central and eastern MT, the Dinosaur Museum in Dickinson, and the Medora, ND fossil dig
- Sheridan added the Dinosaur Tracks near Hyattville, WY and Rapid City added the Dinosaur Exhibit at School of Mines, and the commercial paleontology business of Walter Stein who does dinosaur dig site tours
- A total of 30 sites, stories, and themes were gathered

End Result: Dinosaur/Paleontology Map

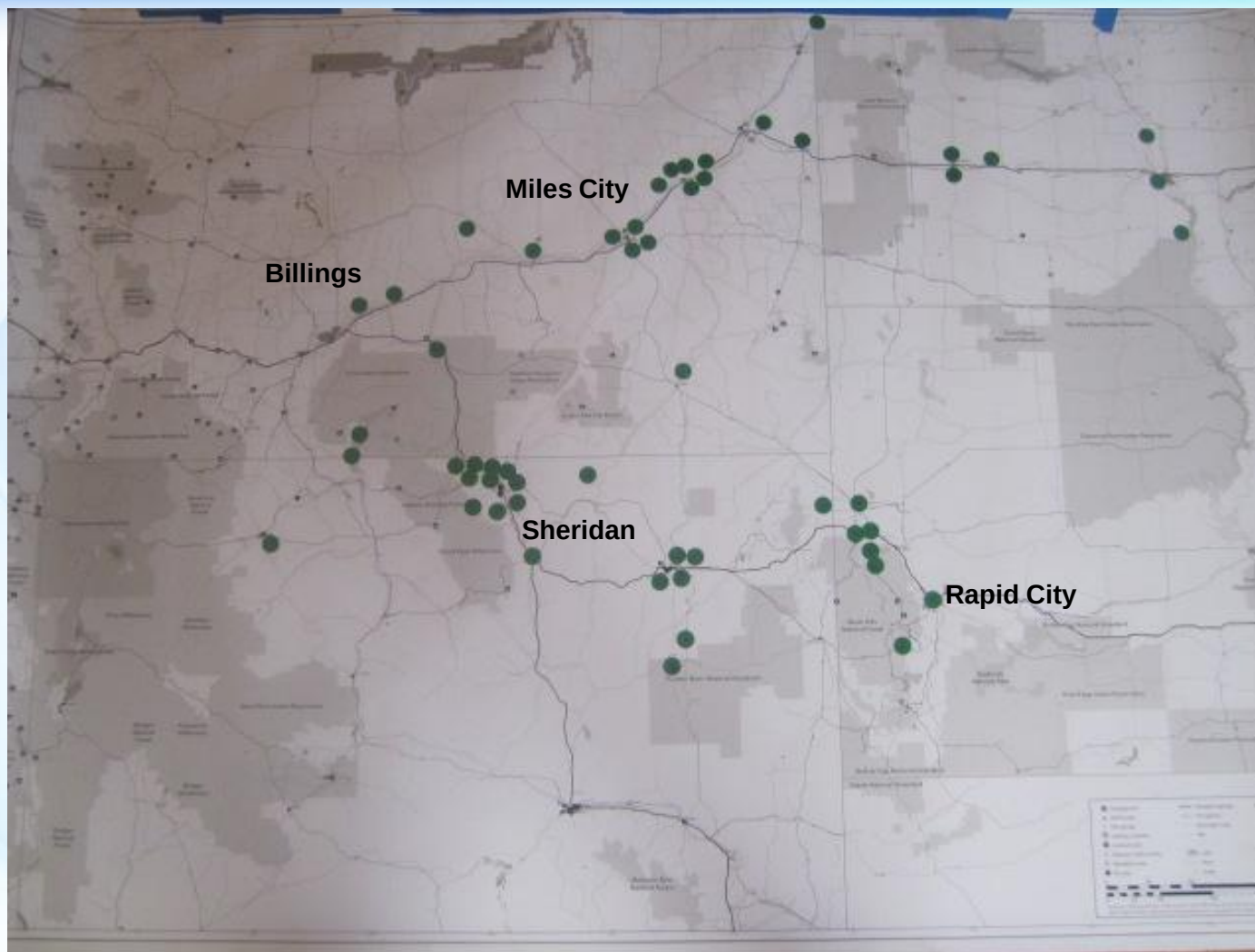




Story Set 4: Pioneers/Settlers History

- Miles City stakeholders identified 24 sites, stories, and events including the Evelyn Cameron Heritage gala dinner in Terry, MT; the Powder River Historical Museum in Broadus, MT; the Calypso Trail outside Terry, MT; and Pioneer Park in Dickinson, ND
- Sheridan added the Kendrick Mansion and area ranches, old jails and post offices, and the Bozeman Trail/ Sawyer Trail
- Rapid City added Belle Fourche, the Opera Houses in Lead & Spearfish, and the High Plains Heritage Center, among others
- A total of 51 sites, stories, and themes were gathered

End Result: Pioneers and Settlers History Map





Story Set 5: Historical Battle Sites

- Miles City identified 15 historical battles, including the Battle of Little Big Horn, Kill Deer Battle, the Battle of Powder River, and the battle between Crazy Horse and Miles
- Sheridan added Dull Knife Battlefield, Soldier Park battle, and Fort CF Smith along the Bozeman Trail (which ties to Battle of Little Big Horn), as well as names of locals who know the history and provide tours
- Rapid City added Crow Buttes, Slim Buttes, Wounded Knee, and Custer's battle route during the 1874 expedition
- A total of 25 sites, stories, and themes were gathered

End Result: Historical Battle Sites Map



Story Set 6: Wildlife (added on stakeholder request)

- Stakeholders suggested a sixth theme: Wildlife
- The major sites were added to the dinosaurs/ paleontology map
- The wildlife tracks includes: Largest antelope herd in the world in Campbell County, WY; the Wyoming Game and Fish wildlife loop tours and hatchery; SE Montana's birding trail; an elk herd in northern Wyoming; pronghorn antelope near Broadus, MT; bighorn sheep near Medora, ND; and the Vore Buffalo Jump in NE Wyoming
- A total of 14 sites, stories, and themes were gathered

Stakeholder Feedback: Tourism Product Development

- Miles City suggested giving planned itineraries to tourists, as well as making brochures, a mobile app, and other promotional materials. They also suggested developing a quarterly magazine to spotlight the region (like *Cowboys & Indians*)
- Sheridan suggested a travel app for the themed paths to cover the 4 state region and specific themes. These could allow people to choose which items were located on the themes they'd selected. Other suggestions included: partnerships with Garmin, Travelocity, and AAA to leverage their expertise and databases as well as to get potential project sponsors, development of a tour and travel book for the area/region (similar to Rick Steve's) that included stories and recommendations, use of the label "quirky places or spots" to attract attention to some locations (i.e. Enchanted Hwy)
- Rapid City cautioned that more data on visitor statistics is needed for business development and the project could yield a "one stop shop for info about the region that the entrepreneur needs to know."

- Miles City stakeholders emphasized that they must have more development within the area to fill in the open spaces.
- Meanwhile, Rapid City also reinforced the importance of tourism entrepreneurship education and promotion. They suggested several ways to achieve this-- webinars, conferences, one-on-one mentoring, SBDC assistance, and university programs.
- Organizations that might help include:
 - Center for Enterprise Opportunity
 - Center for Business Entrepreneurship & Tourism at BHSU
 - School of Mines Black Hills Business Incubator, SGU
 - ND's many business entrepreneurship/ support orgs statewide.



Stakeholder Feedback: Infrastructure Development

- Miles City stakeholders emphasized the importance of more infrastructure development within area, including infrastructure for telecommunications, i.e. improved cell service.
- Sheridan also thought this project might help get more WiFi hotspots on roads, but acknowledged that they would need state support from Governor Mead's Office in WY. Angela Jarvis offered to connect with the Governor's office on this issue.

Stakeholder Feedback: Marketing

- Some felt that “5 story sets is too many” and suggested that “Wild West “captures all and may be an appropriate tagline for this effort
- All groups agreed that further education and promotion of the region’s offerings is needed within and outside the region. Marketing message coordination would require building new connections across the 4 state region and could include: sharing themes, message integration, repositioning ideas of existing businesses to match the promoted themes, and alignment in digital marketing strategies.
- Resources include:
 - State tourism offices
 - RMI
 - Black Hills Badlands & Lakes Association
 - MSRTEP could add communications & marketing people to the Steering Committee.



- Further “sharing of Ideas and Resources” throughout areas within project region required since most “don’t know what the other regions have to offer.”

Suggested solutions include:

- Social media
- Use tourism association meetings to develop cross-marketing partnerships
- Hosting a semi-regular conference or summit that allows live networking across the 4 states

Stakeholder Feedback: People/Organizations/Resources

“The MSRTEP Steering Committee could form subcommittees focused on specific topics/themes and determine which entrepreneurs should be involved.”

Federal Government:

- President Obama Administration (see executive order regarding tourism)
- EDA

State & Local Government:

- Governor’s Office of Economic Development
- State Departments of Tourism
- State of WY (Dianne Shoher, Allen Dubberly)
- Bighorn Mountain Country Coalition
- Northeast WY municipalities organization (Tom Murphy, Gillette Mayor)

Business Organizations:

- Buffalo Chamber of Commerce (Angela Jarvis)
- Wyoming Business Council tourism program (Melinda Johnson)
- Local economic development organizations (EDCs)

Individual Business Leaders:

- Burgess Design Val and Gerry—GoExplore Wyoming
- Entrepreneurs or existing businesses who want to take this on as a business opportunity

Educational Institutions:

- University of Wyoming
- Sheridan/Gillette Colleges
- Sinte Gleska University (Shawn Bordeaux)
- Powell
- BHSU
- college departments of history & journalism

Business Support Organizations:

- BHSU Center for Business Entrepreneurship & Tourism
- BHSU Center for Enterprise Opportunity
- School of Mines Black Hills Business Incubator
- SBDCs and other small business assistance programs

Other:

- Local media—paper, TV, radio
- State historical societies, libraries, museums (i.e. WY Cultural & Historic Trust)
- RMI



Cooperative Tourism Strategy Development Summary

- The meetings were an important step in the process for developing tourism entrepreneurs and associated tourism products connected to the six themed story sets.
- The themed story set maps were populated with attractions and stories that cross state boundaries and present compelling concentrations of sites, events and storytellers that can be more effectively woven into the four-state region's tourism offering.
- Stakeholders from all four states participated in the meetings showing that there is a shared interest in the identified story sets and in collaboratively developing the region's tourism potential.
- Stakeholders showed significant enthusiasm/willingness to participate in next steps. As such, a foundation for implementation activities was built focused on product development, tourism entrepreneurship cultivation, etc.

5. RECOMMENDED APPROACH



Rationale for Recommended Approach

- This project was conceived as a multi-state initiative - so by its very nature it concerns connecting destinations, product and stakeholders across state boundaries.
- As this project is product-driven rather than marketing-driven, it ***does not aim to set up a new organization*** to promote the multi-state region under review.
- Rather, the project endeavors to leverage the existing resources of the four states and channel them towards a shared vision for developing the multi-state region's tourism entrepreneurship potential.

Overarching Existing Challenges to Enhanced Tourism Entrepreneurship



- However, the region's stakeholders face several important challenges that are constraining enhanced tourism entrepreneurship including:
 - Consumers/visitors lack knowledge of historical and cultural assets that are scattered across wide distances.
 - Further, consumers/visitors lack an easy way of understanding how these disparate pieces fit together into a cohesive and logical and interesting way.
 - Finally, much of the region's rural history and culture is unsupported by physical assets.

Proposed Approach to Address these Overarching Challenges



- ***An alternative to costly infrastructure development is to develop compelling stories and make the open spaces relevant.***

This approach involves:

- Combining and presenting to the consumer in a compelling and convenient manner, the disparate history and cultural assets of the region.
- Creating region-wide, cross-state, themed itineraries.
- In the absence of significant infrastructure, base the themed itineraries on storytelling linked to physical sites.
- This approach also leverages cross-area traffic between Yellowstone National Park and Black Hills & Badlands Region.
- And although Yellowstone and the Black Hills/Badlands Region already experience significant tourism traffic by themselves, growing the regional tourism experience overall offers the potential to grow the pie for all tourism actors and area residents.



Expected Benefits of this Approach to Entrepreneurs

- Businesses presently offering products and services directly themed, will achieve the following:
 - Increased relevancy to themed, constructed itineraries larger than themselves and across state lines.
 - Cross-selling opportunities with other area businesses in the same theme.
 - Exposure within the context of each theme's future marketing by state or regional marketing organizations.
 - Appearance on itinerary-based applications: maps, storylines, trail way finding, GPS coordinates, and smart app content.
 - Theme-based connectivity with other theme participants through social media groups.
 - Cooperative marketing opportunities among themed businesses.
 - Opportunities to develop additional products and services based on newly discovered themed sites or stories.
 - Opportunities to create additional, better and more sustainable jobs.

Expected Benefits of this Approach to Entrepreneurs cntd.

- Businesses offering non-themed products and services along the themed itineraries will achieve the following:
 - Additional visitor traffic brought to their front door.
 - Opportunity to keep visitors longer in their town and spending more money.
 - Appearance on itinerary-based applications as a diversion, amenity, ambience, or other attraction.
 - Opportunity to cross-sell with a themed business product or service.
 - Opportunity for new services as guides associated with nearby themed attractions.
 - Opportunity to create additional, better and more sustainable jobs.

Additional Expected Benefits of this Approach

- Focus is on product development. The Project does not create yet another marketing organization competing for similar resources. Rather it gives the existing marketing organizations something additional to sell.
- Binds together assets and places across state lines and delivers products and services in a manner the way consumers think.
- Presents assets in a logical and themed way and makes sense out of an unwieldy and scattered collection of historical and cultural bits and pieces.
- Includes assets in both developed and undeveloped regions of the project area along common themes, presenting them all in an equitable manner.
- Provides a vehicle for coordinating themed events over a wide area in order to create a larger activity palette.
- Does not force top-down management on entrepreneurs, but rather provides opportunities for entrepreneurs to engage.
- Creates in the minds of consumers enough “critical mass” that there is greater legitimacy and “reason to believe” in traveling the themed itineraries.
- Brings consumers a reality as to the distances between major attractions within the Project area, and reasons to make the journey part of their experience.
- Makes history and culture more experiential.

Regional Tourism Model Spotlight: U.S. Forest Service/Southeast Alaska Tourism Cluster Initiative*



- The U.S. Forest Service/Southeast Alaska Tourism Cluster Initiative is an economic development strategy for Southeast Alaska that puts a focus on initiatives to strengthen the tourism sector and four other driving industries in the region.
- It is being implemented by the Juneau Economic Development Corporation. Funding is provided by the U.S. Forest Service whose leaders responsible for the Tongass National Forest (the largest such forest in the U.S.) seek actionable initiatives to enhance use of the forest by visitors as well as the fortunes of tourism entrepreneurs operating within the forest's boundaries.



Source: <http://www.jedc.org/>

* See: <http://www.jedc.org/seclclusterinitiative>

The JEDC Challenge: Coordinating a Stakeholder Response to the National Recession



- Most of SE Alaska's land and resources are within the Tongass National Forest, or adjacent in local water ways, and management of the forest is significant in defining the Southeast economy. The US Department of Agriculture (USDA) Forest Service has organized listening sessions in Southeast, actively participates in the Tongass Futures Roundtable consortium, and is working in partnership to create a Tongass Transition Framework for Economic Diversification. The Forest Service is also working to secure funding for dozens of projects in the Tongass that support sustainable economic activity.
- With its beautiful scenery, historic towns and unique cultural attributes South East Alaska is a world class tourism destination for cruisers and adventure travelers alike. But the national recession dealt the region a serious blow. Tourism leaders decided to take advantage of the crisis to mobilize their stakeholders and industry leaders and move into the improving economy with new tourism offerings, new marketing initiatives and new partnerships.

Southeast Cluster Initiative

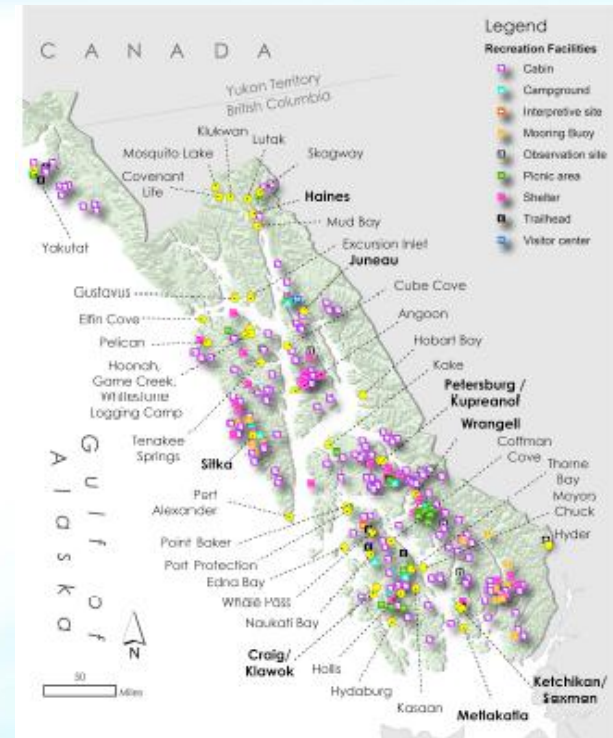


Source: <http://www.jedc.org/>

The JEDC Approach: Linking Economic Analysis to Stakeholder Engagement



- JEDC chose an approach that linked economic analysis to stakeholder engagement processes to ensure that the private sector would work with federal, state and local agencies, university faculty, trade association representatives and other stakeholders committed to addressing the industry's needs, concerns and opportunities on a partnership basis.
- A total of 34 Action Initiatives are currently being considered and implemented with five major action initiatives developed by from the project's Tourism Cluster Working Group (see below.) This plan will guide the USDA Forest Service and Rural Development in its programs to promote economic development for Southeast Alaska.
- Funding for this project has continued by the U.S. Forest Service, led by the Chief Forester of the Tongass National Forest whose objective is to use the analysis and stakeholder engagement process to set priorities and lay out concrete investment and programs over the next decade.



Source: <http://www.jedc.org/>

JEDC Action Initiatives: Moving from Analysis to Action



- **Develop Land and Water Trails and Support Facilities:** The overarching goal of this initiative is to develop and maintain a safe, accessible and diverse land and water trail system for non-motorized and motorized vehicles that allows for optimum outdoor recreational use of the region by residents and visitors, promotes increased visitation to local communities and promotes wellness through physical activity, while protecting the region's natural and cultural resources.
- **Increase Guided Access to Land:** This initiative addresses the lack of permitting flexibility to make quick changes in response to market conditions (more adaptive management and a more micro managed approach). The outcome will be more access to public lands (and to existing areas) to increase capacity.
- **Promote Multi-Community and Regional Visitor Packages:** This initiative will promote more multi-community, regional visitor itineraries through better marketing and promotion of these opportunities. This initiative will promote more multi-community, regional visitor itineraries through better marketing and promotion of these opportunities.
- **Strengthen Accountability for Tongass Recreation Fees:** This initiative addresses the development of a mechanism for more private sector input to decide where fees are allocated. The industry will work with Forest Service to establish more affordable access and/or local control of fee.
- **Integrate Tourism Course with University of Alaska Southeast Existing Degree Program:** The initiative will produce a more qualified and larger group of local applicants for entry level, as well as management level, positions in tourism; create more employment and educational opportunities for Alaskans; groom more prepared managers and guides to showcase the Tongass and other Southeast Alaska attractions; and provide an opportunity for UAS to attract and retain four year students.

6. STRATEGIC RECOMMENDATIONS

Strategic Recommendations

- The Multi-state Tourism Entrepreneurship Project effort has culminated in the following set of strategic recommendations to bring the region's 19th Century cultural heritage into a 21st Century model for economic entrepreneurship that would be, as a whole, "greater than the sum of its parts."
- These strategic recommendations aim to provide the linkages needed to stimulate tourism entrepreneurship, product development and enhanced collaboration across the four-state region.



Strategic Recommendations Summary

Regional Coordination and Project Management

- 1 Strategic Planning/Consulting and Project Management
- 2 Implementation Phase Kick-off "Rendezvous" Event

Regional Entrepreneur Connectivity

- 3 Existing Visitor Industry Engagement
- 4 Hands-on Technical Assistance to Selected Tourism Operators
- 5 Strategic Planning and Consulting - Workforce/Skills Development and Tourism Entrepreneurship Training
- 6 Business Plan Consulting, Reviews & Assistance

Tourism Product Accessibility

- 7 Identification and Mapping
- 8 Story Development
- 9 Vignettes
- 10 Itinerary Development
- 11 Consumer Maps - Preliminary Research, Options Prioritization and Pilot/Prototype
- 12 Smartphone App - Preliminary Research, Options Prioritization and Pilot/Prototype
- 13 QR or Quick Response Code - Preliminary Research, Options Prioritization and Pilot/Prototype
- 14 GPS Based Interpretative Navigation - Preliminary Research, Options Prioritization and Pilot/Prototype
- 15 Social Media Applications - Preliminary Research, Options Prioritization and Pilot/Prototype
- 16 Way finding - Preliminary Research, Options Prioritization and Pilot/Prototype

Themed Consumer Relevancy

- 17 Coordination on Regional Marketing of the Themed Story Sets

Ongoing Collaboration & Communications across Region

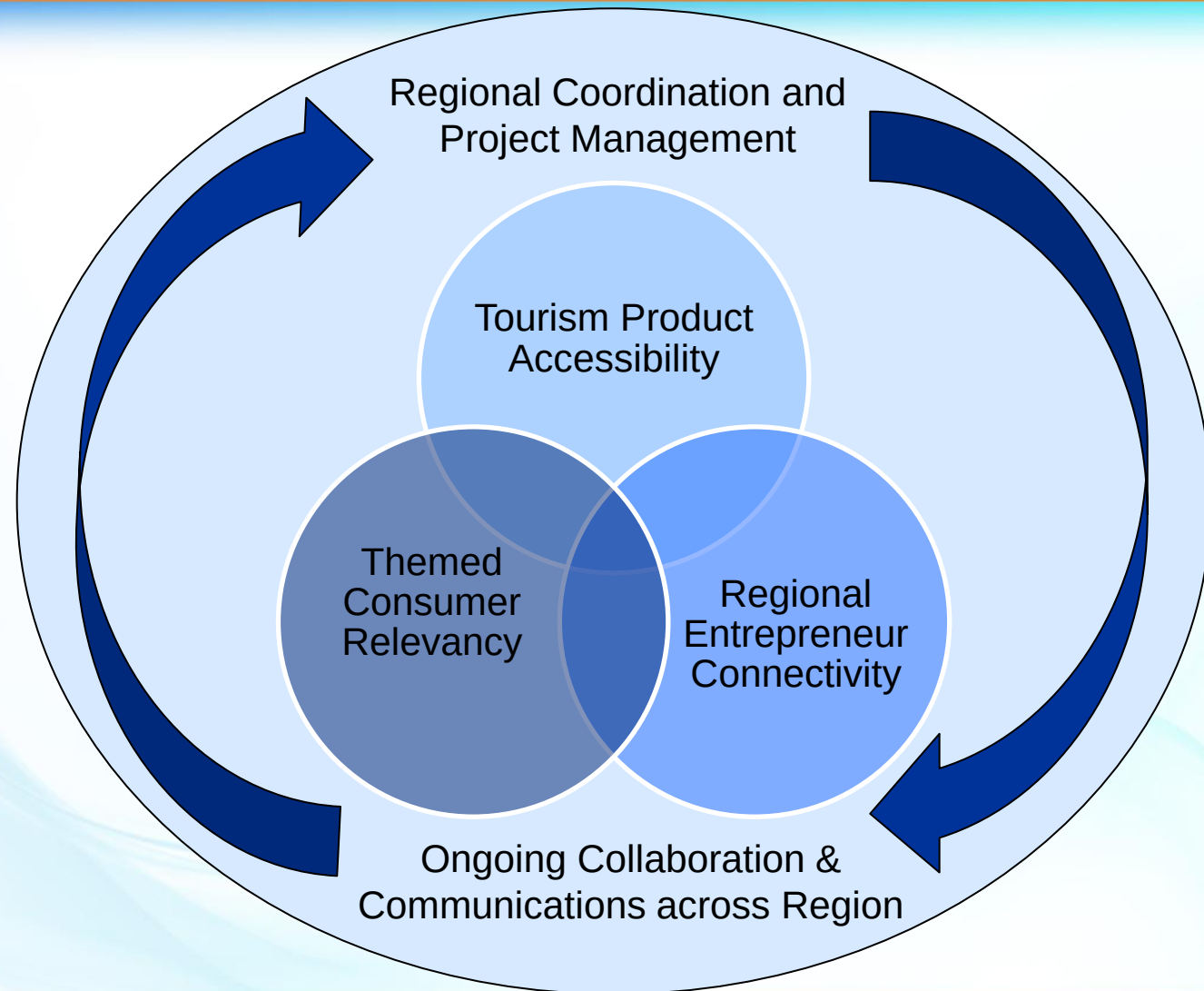
- 18 Rendezvous/ Summit

Recommendations for Future Activities

- Case Study & Lessons Learned
- Tourism and Agriculture Cross-sector Initiative
- Improved Policy Maker Communication

A Holistic Program of Work

- The Consulting Team envisions the set of recommendations offered in this report ***to be internally consistent, thus a holistic program of work.***
- Individual recommendations are described in more detail in the following slides.



Regional Coordination and Project Management Strategic Recommendations



- 1 Strategic Planning/Consulting and Project Management
- 2 Implementation Phase Kick-off "Rendezvous" Event

1 Strategic Planning/Consulting and Project Management

Description:

- A consulting team must be created to generally manage the development of the Themed Story Paths and all the supporting elements to this effort to spur tourism entrepreneurship across the 4 state region.

Rationale:

- The proposed multifaceted/multi-stakeholder process will require thorough project background knowledge, sensitivity to varying stakeholder values and incentive structures and expertise. A unified, focused multi-stakeholder planning and implementation management effort will be required.

2 Implementation Phase Kick-off "Rendezvous" Event

Description:

- An Economic Summit i.e. “Rendezvous” should be convened at the beginning of the implementation phase of the multi-state tourism project. By hosting a “Rendezvous” after the strategy development process is complete (Phase I), the Steering Committee and its partners will have an opportunity to reconvene the motivated stakeholders who worked separately over the previous months and communicate both achieved and planned results. The “Rendezvous” and associated communications would promote the integrated tourism cluster implementation strategy, demonstrate the commitment that many regional organizations and institutions have toward implementation, provide updates to regional stakeholders on the results of the project, and set a path for next steps.

Rationale:

- Not only would this forum serve to demonstrate accomplishments, but also it would offer an opportunity to engage other leaders in the implementation of specific action initiatives or structural transformations in regional economic development practices. As another opportunity to build a shared vision, such a Summit would hold stakeholders accountable for achieving results and serve as a springboard into further implementation-related activities to champion future competitiveness initiatives.



Regional Entrepreneur Connectivity Strategic Recommendations

- 3 Existing Visitor Industry Engagement
- 4 Hands-on Technical Assistance to Selected Tourism Operators
- 5 Strategic Planning and Consulting - Workforce/Skills Development and Tourism Entrepreneurship Training
- 6 Business Plan Consulting, Reviews & Assistance

3 Existing Visitor Industry Engagement

Description:

- An individual or small team will go into the field and meet with local groups to educate them about the project, solicit their involvement, and provide on the spot consulting as to how they can work with local businesses to bring their existing companies into the themed itineraries. This would include engagement with important chambers such as the Billings Chamber of Commerce and others who are familiar with tourism entrepreneurs in their respective regions and can assist the consulting team to identify existing business people and entrepreneur role models who should be incorporated into the project.

Rationale:

- Opportunities to develop additional products and services based on newly discovered themed sites or stories with end goal to create additional, better and more sustainable jobs.

4 Hands-on Technical Assistance to Selected Tourism Operators



Description:

- Tourism operators will require technical assistance to most efficiently and effectively reorient and/or reshape their offerings to align with this project's recommendations. This would involve among other activities, providing important data to select tourism entrepreneurs such as information about: relevant visitor traffic counts, visitor profiles and how tourism offerings can be tailored to serve their interests, and how to connect with other operators in their specific theme and/or other tourism operators in their region.

Rationale:

- Sustainability of the story sets and associated itineraries as consistently available consumer benefits depend on achieving commitment from the entrepreneur in bringing the stories to life and providing expected services, and exhibiting the "brand" of the Itineraries.

Regional Tourism Model Spotlight: Travel Oregon's "Rural Tourism Studio" Entrepreneur Outreach, Training & Technical Assistance Program



- Small communities benefit from seeing their towns as a visitor sees them. Oregon's Rural Tourism Studio is a training program designed to assist rural communities interested in sustainable tourism development. The program assists small towns throughout rural Oregon in understanding how visitors make decisions to stop and spend money.



RURAL TOURISM STUDIO

- This program effectively engages stakeholders in improving the visitor experience and has brought current tourism market trends and industry best practices to small rural operators.

5 Strategic Planning and Consulting - Workforce/Skills Development and Tourism Entrepreneurship Training



Description:

- New training and education programs will need to be developed to train the area's workforce to aid in the delivery of the story sets as one of the areas new commercial tourism offerings. This will include both new training programs at multiple levels, the addition of "tourism entrepreneurship track" to the region's business schools, hospitality management, and entrepreneurial development programs, and new sources to link budding entrepreneurs with role models who have established success as tourism entrepreneurs. Some activities that might be considered include:
 - Education and other activities to promote entrepreneurship and relevant resources in the region (webinars, conferences, one-on-one coaching)
 - Peer-to-peer assistance activities guided by educational institutions
 - Programming assistance to develop new product at business level tied to the story sets

Rationale:

- Consistency/dependability issues and high turnover rates were frequently cited as key constraints. This effort would aim to realign the region's workforce delivery system to better meet the human resources needs of tourism operators and other tourism sector employers.

Regional Tourism Model Spotlight: Business Planning & Entrepreneur Mentoring



- i2E, Inc. in OK has “Venture Advisors” who collaborate with and mentor entrepreneurs throughout the state. The advisors work closely with each entrepreneur, coaching them with early stage technology development, business planning, and positioning for funding, and as well as in later stages when the companies are launching or going through a period of growth.
- i2E also hosts an “Entrepreneurs-in-Residence” to assist entrepreneurs to build a management team and sustain operations.
- Services available to OK’s entrepreneurs include: One-on-one mentoring, networking workshops, seminars and receptions with other business leaders and investors, and a variety funds that provide financial capital to companies at all stages.
- In FY2011:
 - portfolio companies reported job growth of 22 percent.
 - 27 portfolio companies raised \$35 million in private capital.
- Since 1999, \$15 million in funding from the program’s Concept Fund and the Oklahoma Seed Capital Fund has helped attract more than \$440 million in subsequent investment.



Source: <http://www.i2e.org/>

6 Business Plan Consulting, Reviews & Assistance

Description:

- Associating themselves with these storylines, local area entrepreneurs will be in a position to build new commercial business ideas to sell tourism products or services in the local area. The business plans will be developed including an assessment of competitor regions/products, the size and locations of the potential target markets, financing required and potential sources, staffing & technological needs, etc.*

Rationale:

- Addresses a key issue frequently cited that is constraining tourism entrepreneurship, ensuring that business and project concepts are firmly rooted in market realities and guided by industry expertise, thereby enhancing the likelihood of economically viable investments that will lead to sustainable and better jobs.

* There are many existing resources within the region that can be leveraged to support this activity including (among others): Center for Enterprise Opportunity at BHSU, Center for Business Entrepreneurship & Tourism at BHSU, Black Hills Business Incubator at School of Mines, SGU, MSU Billings, North Dakota's many business entrepreneurship/ support organizations, University of Wyoming and Sheridan, Gillette, Powell colleges.



Tourism Product Accessibility Strategic Recommendations

- 7 Identification and Mapping
- 8 Story Development
- 9 Vignettes
- 10 Itinerary Development
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- 15 Social Media Applications - Preliminary Research, Options Prioritization and Pilot/Prototype
- 16 Way finding - Preliminary Research, Options Prioritization and Pilot/Prototype

7 Identification and Mapping

Description:

- Identifying themed locations to be included within each of the five itineraries. This will require significant desk research of historical publications as well as interviews with history and cultural experts, and group meetings with local stakeholders, Native American cultural representatives, and others. A final assessment will define which locations and stories merit inclusion in the themed itineraries.
- Numerous existing resources can be leveraged to support this activity. For example, the “Ultimate Wyoming” book and website can be used as a resource to build from.

Rationale:

- What will finally be included in the five itineraries must meet specific criteria of authenticity, emotional or intellectual consumer appeal, physical accessibility, carrying capacity, sustainability, etc. Each location needs to be vetted.

8 Story Development

Description:

- A writing consultant will be required to convert the information into compelling stories that retain the interest of the consumer, and lend themselves to experiences on the sites, e.g. artifact displays, demonstrations, photographs, verbal storytellers, acting vignettes, etc.

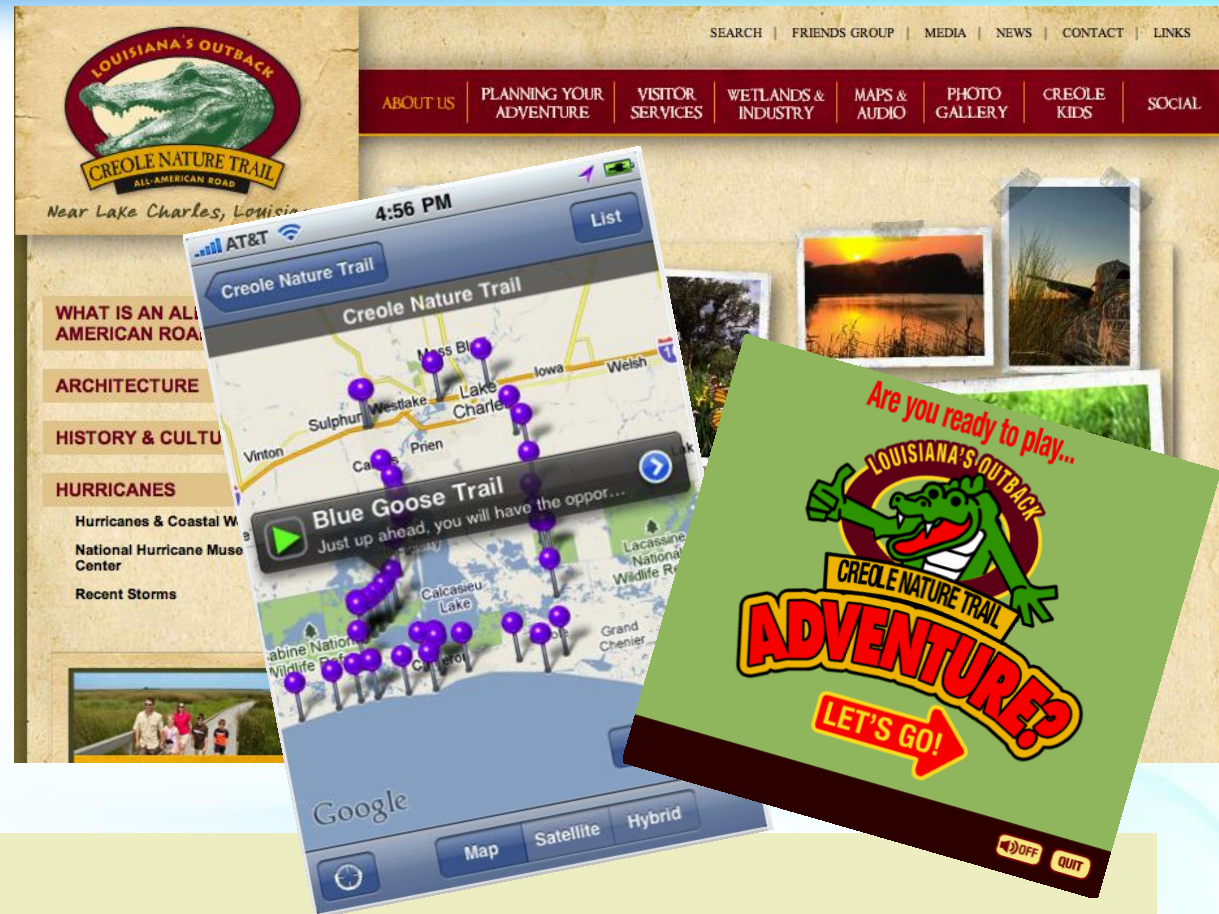
Rationale:

- Need compelling stories to tell and a variety of methods to best convey information and story content.

Regional Tourism Model Spotlight: Creole Nature Trail Uses Multi-media Approach to Interpretation



- 180 miles of bayous, marshlands & beaches in SE Louisiana is made accessible through multi-media interpretation. Website, trail signs, interactive app, video vignettes, photos, consumer blog, audio tour, interactive maps, brochures and games for kids all work synergistically to boost visitation.



I'd Rather Be Fishing • 3/31/2011 3:14 PM

Was on the Creole Nature Trail on Monday and let me tell you the alligators were OUT! Stopped at Wetland Walkway and were two laying right by the entrance kiosk...swear they were even posing for the camera. Lots of baby gators out sunning...great time to be on the trail!

9 Vignettes

Description:

- Translate important aspects of the developed story sets into multimedia delivery with audio, video, music, etc. Also generate multilingual vignettes versions for French & German tourists. This would be a hook for Travel USA. They might help fund translations.

Rationale:

- The stories must be entertaining, convenient while driving, and adapted to the delivery technologies. This will require some production qualities in addition to written stories.

10 Itinerary Development

Description:

- Themed itineraries associated with the developed story sets must be developed as alternatives for consumers with different interest, time allotments and beginning locations, in order to lure as many visitors as possible to these themes.

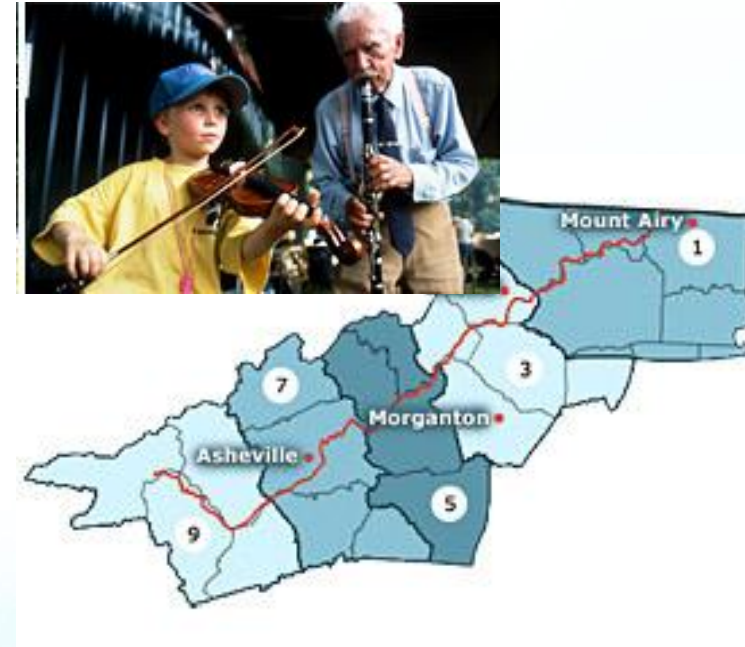
Rationale:

- Use of the themed itineraries can be optimized by packaging them, as the consumer is likely to use them, from whatever direction or point of entry they use to enter the target region, and however long they wish to follow the trails.

Regional Tourism Model Spotlight: North Carolina's Blue Ridge Music Trails*



- A 1995 North Carolina Arts Council initiative: “provided start-up funding to create tourism trails in western North Carolina that focus on cultural assets with national significance: traditional music of the Southern Appalachians and the culture and history of the Eastern Band of Cherokee Indians.”
- The 2003 Blue Ridge Music Trails and Cherokee Heritage Trails guidebooks highlighted music, dance, craft and storytelling traditions to make the venues, sites and resources presented in 25 western counties in North Carolina more relevant to the end consumer.
- Some 17,000 copies of the guidebooks have been sold and additionally, “web sites, maps, sound recordings and videos are functioning both as educational resources and as tracking tools to monitor the economic benefits that the trails are bringing to rural areas and small towns in the region.”



* http://www.ncarts.org/freeform_scrn_template.cfm?ffscrn_id=632
<http://ncartstrails.org/blueridgemusic/Home.aspx>

11 Consumer Maps - Preliminary Research, Options Prioritization and Pilot/Prototype



Description:

- Another application will be the printing of paper maps of the themed itineraries. This would include not only a cartographer and illustrator, but also perhaps someone to sell advertising on the map. The existing Black Hills map which shows the themes could be a potential model to draw from.

Rationale:

- Maps are the most efficient way to communicate information about the itineraries, and are applicable to both print and electronic media. Illustrated maps will be critical to both project participants and the consumer.

12 Smartphone App - Preliminary Research, Options Prioritization and Pilot/Prototype



Description:

- The themed itineraries would be applied to a smartphone app, along with photos, video, interpretative audio and printed content, retail content, and the like. GoExplore WYOMING! could be a potential model to draw from.

Rationale:

- According to a 2011 study, six out of ten mobile users are downloading travel apps. In the absence of high density population and infrastructure, the near ubiquitous smartphone has the capacity to download and deliver content on demand, even later, in the absence of Internet connectivity. Content is the driving force behind the Themed Itineraries.



13 QR or Quick Response Code - Preliminary Research, Options Prioritization and Pilot/Prototype



Description:

- There are several types of matrix barcode available that links directly to online content. In spite of the lack of wireless connectivity in much of the Project Area, this could still be a useful vehicle for distributing interpretative content for themed trails and sites. These codes could be associated with way finding signs, site-specific interpretation placards, or in nearby towns with Wi-Fi.

Rationale:

- In addition to at home pre-trip planning at the computer, there needs to be on-site or near-site Wi-fi capabilities where themed content can be downloaded. The QR technology allows physical signage TAGS to link to downloadable site specific content.

Description:

- There are several existing technologies for audio commentary linked to GPS points. These allow vehicle occupants, as well as pedestrians, to hear audio descriptions and stories when the GPS unit nears its location point. What remains to be seen is if this technology can be combined with standard GPS navigation, where the consumer is told both how to navigate and what they are encountering. Partnerships could potentially be forged with Garmin, Travelocity, AAA to leverage their expertise and databases; as well as potential sponsorship opportunities.

Rationale:

- This solves the issue surrounding the lack of mobile phone and data access in remote areas. GPS units loaded with content are triggered at the right location to tell the themed stories.

15 Social Media Applications - Preliminary Research, Options Prioritization and Pilot/Prototype



Description:

- There are several options for using social media with the themed itineraries. These include:
 - Social media consumer sites - Creating social media consumer sites, where consumers can share their stories, photos, reviews, video, and other material about their road trips.
 - Social media “sell” sites - Creating “sell” social media sites that make the compelling story for following the themed itineraries.
 - Region-wide social media site - Launching a social media site so that providers along themed routes can communicate with each other and create synergy along the trail, develop cross-marketing partnerships, alert each other about groups, events, motel vacancies, weather, etc. This could help create a community of entrepreneurs along the themed routes and helps to bind the group together for mutual support and benefit.

Rationale:

- Third party testimony is one of the most powerful ways to build credibility of a destination. Allowing visitors to post their own region experiences adds validity to the destination consideration. Also, pure marketing social media sites are frequently used by destination to reach consumers to utilize social media as their main source of news and information. These sites take advantage of the role of the Internet as the first “go to” place for travel information and enhance the legitimacy and robustness of the Themed Itineraries by adding consumer reviews.

15 Social Media Applications - Preliminary Research, Options Prioritization and Pilot/Prototype cntd.



Rationale cntd:

- For instance in Queensland Australia, a Facebook marketing campaign drew over 375,000 internet users to the official website of the campaign. Because of this campaign, web searches for Queensland rose 40%, and 9,000 tickets to the area were purchased directly from the website.

* <http://www1.pressdemocrat.com/apps/pbcs.dll/article?AID=/20060423/NEWS/604230383/1036/BUSINESS01>

Regional Tourism Model Spotlight: Angels Camp, CA Branding for Relevancy in Today's Travel Market



- Prior to a branding initiative, Angels Camp was just one of several small gold rush towns in the Sierra Nevada foothills.
- By identifying its legacy and resources for the modern traveler, Angels Camp successfully branded itself as the Mountain Sports Basecamp for the whole region.
- Branding was accompanied by new recreational product positioning, and the improvement of accommodations and dining options.
- Additional interpretation of available assets attracted more visitors



- Consequently, Angels Camp vaulted itself above neighboring communities and seized the title of Base Camp for Mountain Sports in the Sierra Nevada Mountains.
- New businesses like O.A.R.S. gravitated to Angels Camp to take advantage of the new branded environment.

16 Way finding - Preliminary Research, Options Prioritization and Pilot/Prototype



Description:

- A possible application of the themes is way finding trail markers. This requires not only sign content and design (and interpretative content in some cases), but also stewarding these trails through state legislatures and meeting the requirements of state departments of transportation guidelines/requirements.

Rationale:

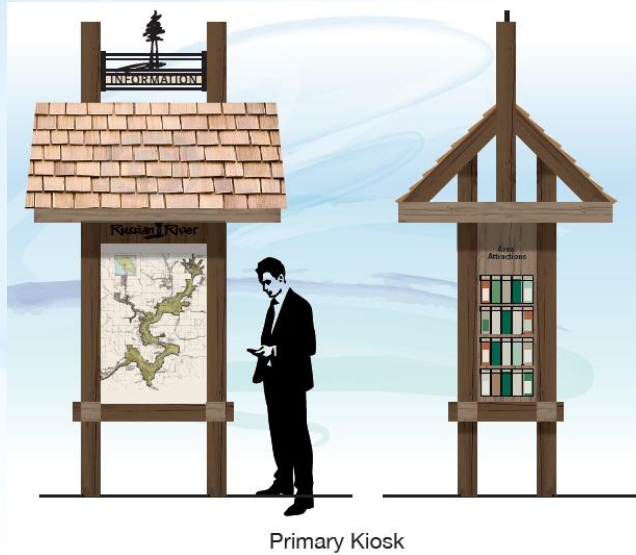
- In spite of growing electronic communications technology, highway signs are still an important and immediate navigational tool for drivers. Consumers are historically familiar with “Trail” highway signs, and the inclusion of at least some Themed Itinerary trail signs will be important.

Regional Tourism Model Spotlight: Russian River, CA

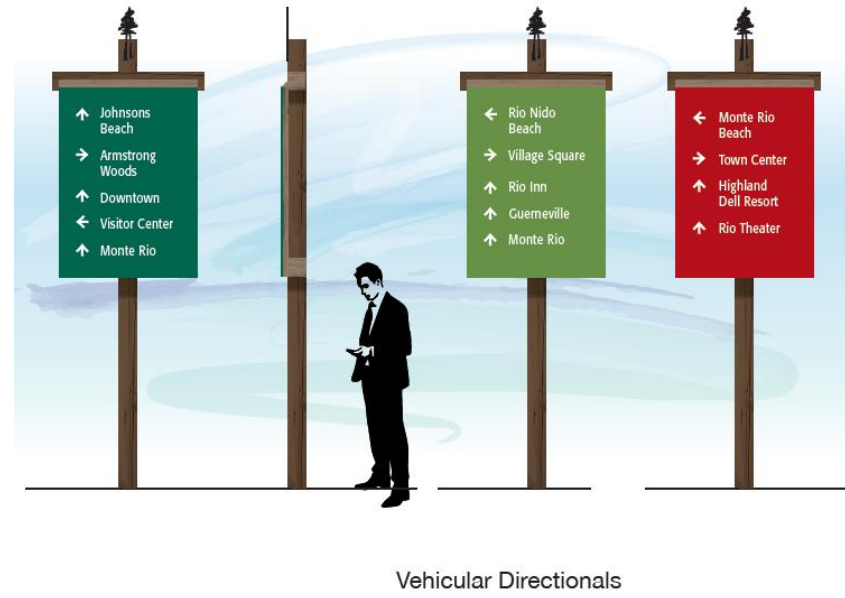
Wayfinding Improvements



- Wayfinding signage was created to bind together three different communities along the Russian River highway and information kiosks associated with the regional "brand". The signs look the same but show community individuality by the use of different colored backgrounds to the sign messages.



Primary Kiosk



- The kiosks allow for brochure racks, but can also contain QR tags for linking to relevant websites about each destination and specific products.



17 Coordination on Regional Marketing of the Themed Story Sets

17 Coordination on Regional Marketing of the Themed Story Sets



Description:

- Within the proposed management and implementation process, State Tourism Office advisory services will be required – the proposed consulting team will assist the State Tourism Offices and relevant local offices in incorporating the Themes into their marketing materials with the goal to coordinate messaging (e.g. share themes, integrate messages, build new connections):
 - Alignment in which brands are being promoted by regional marketing organizations
 - New connections across the region
 - New and aligned digital marketing strategies
 - Local businesses learning how to reposition their existing businesses to benefit from the marketed themes

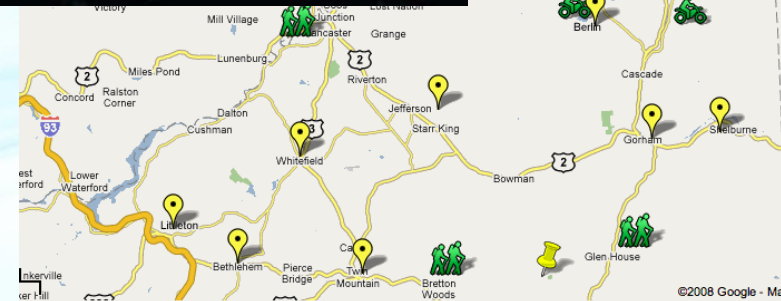
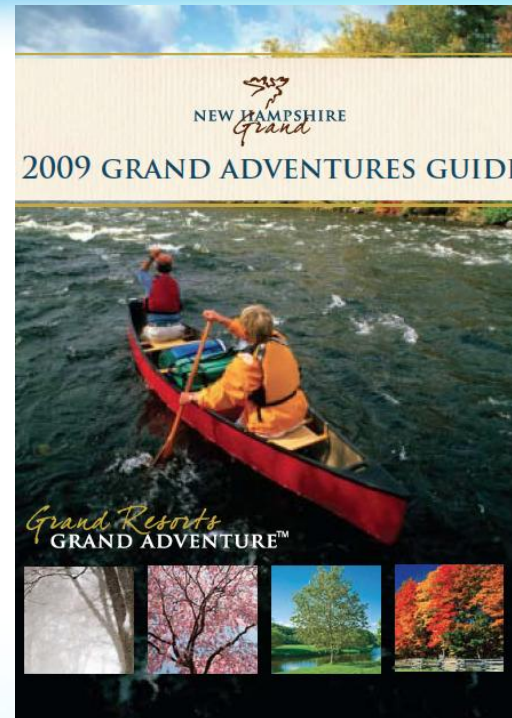
Rationale:

- To optimize the project's results and benefits to area tourism entrepreneurs, the consulting team must work directly with existing tourism marketing associations and leverage their promotion of these Story Itineraries and Themes once they are developed.

Regional Tourism Model Spotlight: Different Themes within a Regional Brand Spread Visitors Around



- New Hampshire's most rural area – Coos County used a single brand and several sub-themes to both unify a tourism region few people understood and to showcase its variety of four season outdoor recreation.
- Using mapping as a visual cue, visitors saw where themed sports like skiing or sno-mobiling, hiking or ATV'ing took them. Each small community within the region projected their specialty sport in their shopping and dining districts



Ongoing Collaboration & Communications across Region Strategic Recommendations



18 Rendezvous/Summit

18 Rendezvous/ Summit

Description:

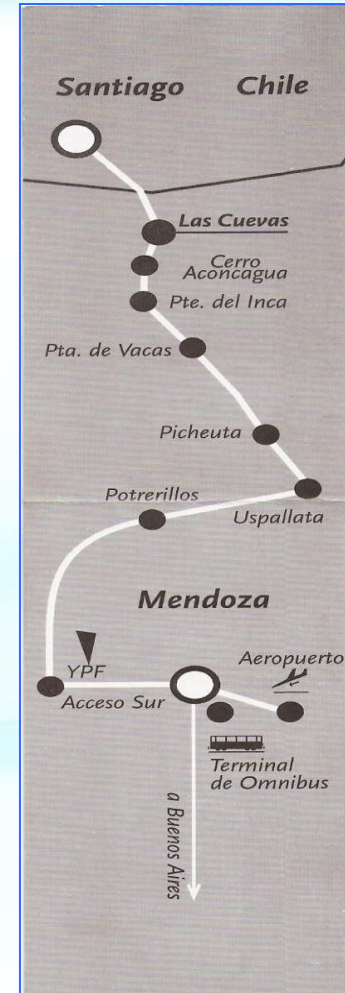
- An Economic Summit i.e. “Rendezvous” should be convened at the close of Phase II of the multi-state tourism project to reconvene the motivated stakeholders to review progress and results and make decisions about the most effective ways to allocate resources going forward.
- The “Rendezvous” and associated communications would promote the integrated tourism cluster implementation strategy, demonstrate the commitment that many regional organizations and institutions have toward implementation, serve as an important networking opportunity for participants and provide updates to regional stakeholders on the results of the project and set a path for next steps.

Rationale:

- This event would serve as an important bridge between Phase II and future activities related to this effort. Not only would this forum serve to demonstrate accomplishments, but also it would offer an opportunity to engage other leaders in the implementation of specific action initiatives. As another opportunity to build a shared vision, such a Summit would hold stakeholders accountable for achieving results and serve as a springboard into further implementation-related activities to champion future competitiveness initiatives.

Regional Tourism Model Spotlight: Overcoming Jurisdictional Boundaries and Associated Mindsets

- Arco de Las Cuevas is a lodging establishment located in the province of Mendoza, Argentina, close to the border with Chile and near a major tourism destination, Aconcagua, the tallest mountain in South America.
- The majority of the establishment's tourism traffic came in the summer months and was centered on visits to Aconcagua. But it had trouble attracting clients during the offseason, negatively impacting the ability to scale up the business and stay profitable.
- The Consulting Team discovered that an inability to overcome the jurisdictional boundary between Argentina and Chile was a significant underlying issue preventing further market development. For instance when referring to the Arco de Las Cuevas' promotional map to the right:
 - Although the establishment is located close to one of South America's largest cities, Santiago, Chile, most of the details pertain to the Argentina. In addition, almost all of the hostel's marketing efforts were centered on the city of Mendoza and when possible, also in Buenos Aires. It was not marketed in Santiago at all.
 - The map does not show the establishment's proximity (20 KM) to Portillo in Chile, one of the most important winter resorts in all of Latin America and a destination for the off season (northern hemisphere) ski/snowboard markets from North America and Europe (many of these tourists come to Chile either exclusively or primarily to ski/snowboard via Santiago).
- Consequently, the hostel's prime location half way between two of the southern cone's most important tourist attractions and its close proximity to a major urban center and key gateway for inbound winter tourism traffic was not marketed strategically.
- This type of mindset is common in cross border regions. Developing marketing and sales links to tourism operators in Santiago and Portillo, Chile and international ski and snowboard-related tourism operators helped smoothen out fluctuating seasonal demand, allowing the hostel to become a much more competitive and profitable operation.



Recommendations for Future Activities

- Case Study & Lessons Learned
- Tourism and Agriculture Cross-sector Initiative
- Improved Policy Maker Communication

Case Study & Lessons Learned

Description:

- The process for developing this new tourism offering for the 4-state region will be documented in a case study complete with lessons learned that can be shared with other regions with similar potential and development constraints.

Rationale:

- Documents this project's issues critical issue areas and processes to advance comprehensive strategic planning and provides a tool kit with implications for other regions in the US with similar tourism asset endowments or that are facing similar stakeholder coordination issues.

Tourism and Agriculture Cross-sector Initiative

Description:

- The development of signature agricultural products provides an opportunity to create a strong connection between agricultural products, their local production context and a region's tourism offering. With this in mind, the quality of the rural tourism offering is often intertwined with the quality of the agricultural product and rural tourism can potentially have a multiplier effect on the agriculture sector. Thus, the tourism and agriculture sectors have a common interest in integrating their offerings to ensure quality and promote their respective products.
- All told, there are positive indications of growing demand for signature agricultural products that are differentiated by place of origin or production method and as travelers continue to demand more authentic activities and experiences in the destinations that they visit, the tourism industry should anticipate an increased demand for locally produced food products. region.

Rationale:

- Leverages synergistic potential between two important economic sectors in the region. Actors in many regions of the world are collaborating in order to leverage pre-existing market positions in tourism related to specific agricultural products.

Tourism and Agriculture Cross-sector Initiative cntd.

Rationale cntd:

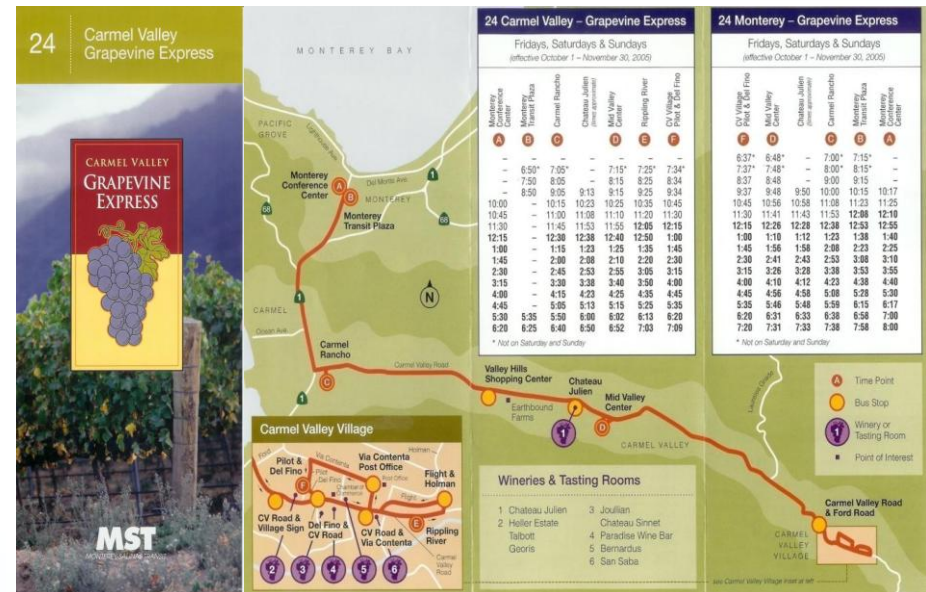
- They have defined unique regional selling points related to other agricultural products or rural attractions and have developed and marketed rural tourism products that are extending the benefits accrued from rural tourism into other parts of the rural economy.
- In Sonoma County, California for example, the county's agricultural and tourism industries are tightly intertwined. Together, they generate \$1.8 billion to \$2 billion annually, or about 10 percent of the county's \$19 billion overall economy, according to the Sonoma County Economic Development Board.*
- Sonoma County's leaders have done a good job of recognizing the synergies that exist between the two sectors and then leveraging those synergies to co-market and co-brand signature agricultural products through both agricultural and tourism sales and marketing channels.

* <http://www1.pressdemocrat.com/apps/pbcs.dll/article?AID=/20060423/NEWS/604230383/1036/BUSINESS01>

Regional Tourism Model Spotlight: Successful Cross-sector Collaboration in Monterey, California



- A particularly successful concrete cross-sector initiative was Monterey CA's "Grapevine Express." When the effort started, Monterey's tourism cluster leaders lamented that there were few tourism development opportunities related to the region's famous wine sector.



- Monterey's agriculture cluster leaders were disappointed they did not generate more income via tourism. The leaders of the two clusters were brought together and within 6 months this idea became a reality and an extremely successful business venture.

Improved Policy Maker Communication

Description:

- Improved communication and pro-competitive relationships at the federal, regional and local levels.

Rationale:

- Stimulates dialogue among relevant policy makers, informing them of regulatory constraints impacting tourism sector job growth and establishing means for reaching consensus on appropriate interventions in the status quo that will lead to opportunities for job creation.

7. IMPLEMENTATION ACTION PLAN AND NEXT STEPS

Argument for Action Orientation

- During the Multi-state Tourism Entrepreneurship Project to date, many important objectives have been achieved including:
 - Verified that there is significant potential for tourism development and entrepreneurship growth in the four state region.
 - Verified that there is considerable interest amongst tourism actors in collaborating across jurisdictional boundaries to maximize tourism market opportunities.
 - Put forward a holistic approach and an integrated set of recommendations to most effectively maximize tourism market opportunities.
 - Identified possible funding programs to support implementation activities.
 - Local leadership is in place and motivated to steward the implementation process.

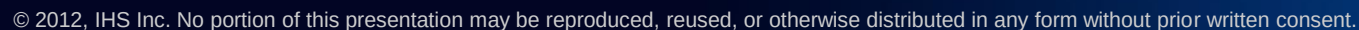
Argument for Action Orientation cntd.

- The strategic recommendations and corresponding implementation plan put forward in the previous section build directly off the analysis that has been conducted under this effort to date.
- With this study and associated recommendations and implementation action plan, the stage is set to transition from analysis to action and take the concrete steps necessary to stimulate tourism entrepreneurship, product development and enhanced collaboration across the four-state region.
- The tables in the following slides summarize the Consulting Team's strategic recommendations and proposed implementation action plan.

The Overarching Importance of Rapid Implementation*

One of the lessons learned is that regardless of the quality of research, analytical processes that take a long time, de-motivate and create a negative attitude amongst stakeholders and in the central leadership of the project. Reducing the level of time spent on diagnostics and moving faster into implementation creates a more positive, motivated stakeholder leadership group and accelerates the overall mobilization of the project. Remember, the level of diagnostics can be refined in the future; some strategies and initiatives can be changed, and it doesn't need to be at the cost of leadership mobilization.

* Adapted from: Hansen, Dr. Eric. "Clustering, Innovation, and Regional Development: What Works! – Lessons from Successful Clustering Project Implementation." UNIDO Workshop on Cluster- Based Economic Development, June 2003.



PHASE I

Potential Phase II Implementation Action Plan Detail

	TASK	ACTIVITY	2012				2013											
			Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
PHASE II	1	Strategic Planning/Consulting and Project Management																
	2	Implementation Phase Kick-off "Rendezvous" Event																
	3	Existing Visitor Industry Engagement																
	4	Hands-on Technical Assistance to Selected Tourism Operators																
	5	Strategic Planning and Consulting - Workforce/Skills Development and Tourism Entrepreneurship Training																
	6	Business Plan Consulting, Reviews & Assistance																
	7	Identification and Mapping																
	8	Story Development																
	9	Vignettes																
	10	Itinerary Development																
	11	Consumer Maps - Preliminary Research, Options Prioritization and Pilot/Prototype																
	12	Smartphone App - Preliminary Research, Options Prioritization and Pilot/Prototype																
	13	QR or Quick Response Code - Preliminary Research, Options Prioritization and Pilot/Prototype																
	14	GPS Based Interpretative Navigation - Preliminary Research, Options Prioritization and Pilot/Prototype																
	15	Social Media Applications - Preliminary Research, Options Prioritization and Pilot/Prototype																
	16	Way finding - Preliminary Research, Options Prioritization and Pilot/Prototype																
	17	Coordination on Regional Marketing of the Themed Story Sets																
	18	Rendezvous/ Summit																

Potential Phase III/IV Implementation Action Plan Detail

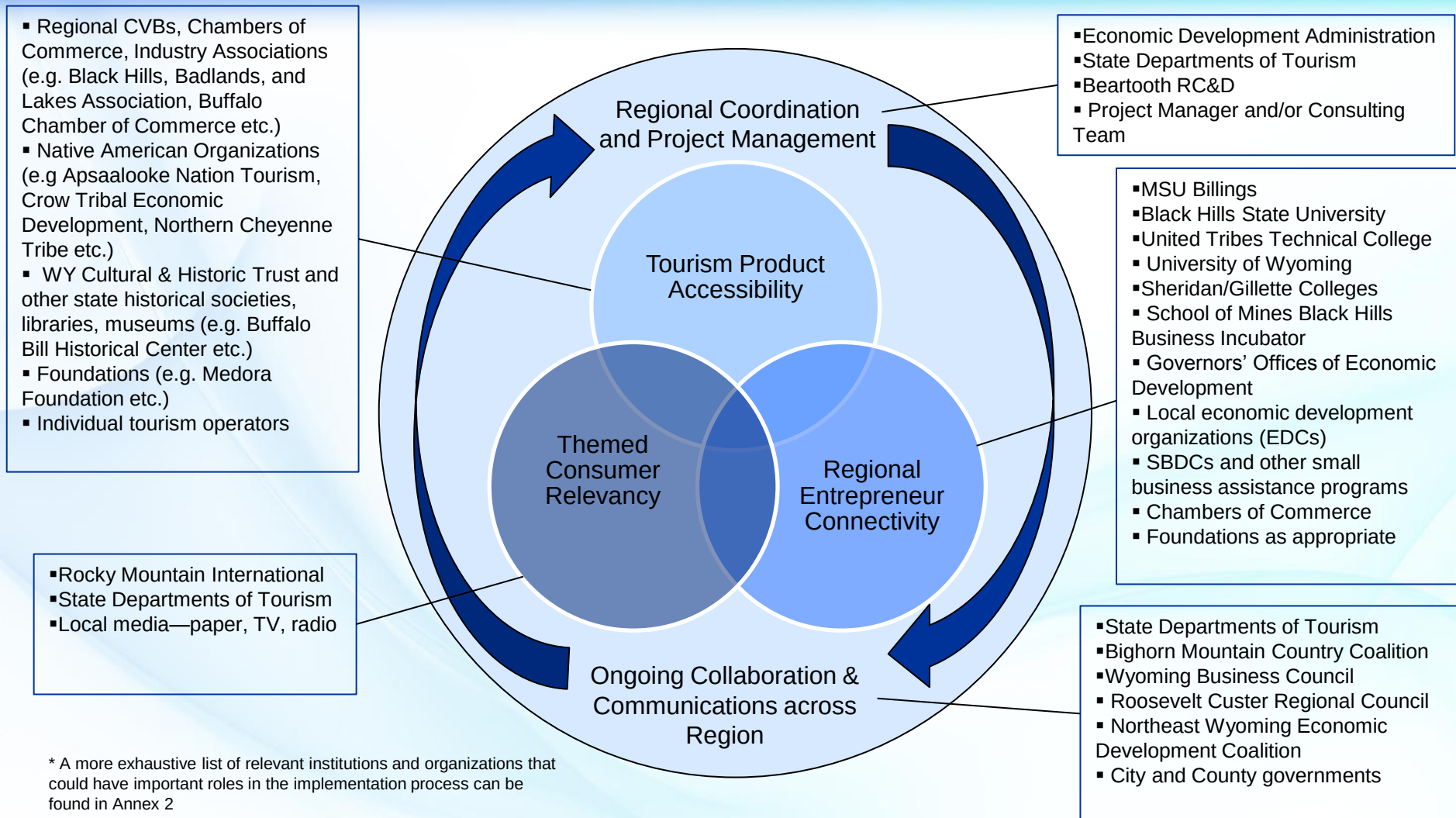
	TASK	ACTIVITY	2013				2014			
			Sep	Oct	Nov	Dec	Q1	Q2	Q3	Q4
PHASE III										
		Case Study & Lessons Learned								
		Smartphone App - Technology Development and Deployment								
		QR or Quick Response Code - Technology Development and Deployment								
		GPS Based Interpretative Navigation - Technology Development and Deployment								
		Social Media Applications - Technology Development and Deployment								
		Way Finding - Physical Infrastructure Development and Deployment								
		Annual Rendezvous/ Summit								
Phase IV		Tourism and Agriculture Cross-sector Initiative								
		Improved Policy Maker Communication								
		Annual Rendezvous/ Summit								



An Integrated Vision by the Region's Economic Development Institutions Will Support the Project's Successful Implementation

- Private entrepreneurs are the ultimate beneficiaries of this project.
- However, to most effectively support tourism entrepreneurship through the integrated and multifaceted planning and implementation effort proposed in this report, will require the participation, support and expertise of numerous organizations and institutions throughout the region.
- Fortunately, the region benefits from the presence of a vast network of institutional and organizational infrastructure.
- The diagram on the following slide is not intended to be exhaustive or prescriptive, but shows in which specific domain areas certain organizations and institutions could have important roles in the implementation process.

Leveraging the Region's Vast Institutional Infrastructure: A Holistic and Integrated Approach to Implementation*



Next Steps

- An implementation phase meeting will be held on September 20 and 21 in Buffalo, Wyoming.
- Identifying the appropriate funding programs to support implementation and taking the steps necessary to access this funding is of paramount importance. To have the intended effect, this initiative must go beyond analysis and planning to mobilizing a set of strong leaders from business, government, community-based organizations and academia in a process that will both inform and enable action and results.



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Annexes*

- Annex 1: Complete List of Tourist Resources and Assets Identified Related to Story Sets
- Annex 2: Comprehensive List of Relevant Institutions Organizations that could have Important Roles in the Implementation Process

* Annexes are in separate documents