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2017 Trends & 2018 Outlook

Montana Tourism Business Survey

Dr. Norma P. Nickerson

1/2/2018



A survey of Montana tourism business indicated that 2017 was good for some and not so good for others, the fires had a big impact on their customer volume, employee shortage is a concern, and optimism for 2018 is not as high as in recent years.

2017 Trends & 2018 Outlook: MT Tourism Business Survey

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Abstract

This study provides results of the annual Montana tourism business survey looking at the past years' trends and their prediction of the coming year, 2018. Businesses responded to questions about employee shortages, employee education needs, and a look into how the 2017 wildfire season impacted their business.

Executive summary

This annual survey provided a mini-view into some issues currently being felt by business owners within the Montana tourism industry. It also provided a look back into the success of their business in 2017 with a prediction of their anticipated business volume for 2018.

Results of the survey showed the following:

- About half of Montana tourism businesses had an increase of visitor volume in 2017. A little over a quarter of business had a decrease and slightly less than a quarter experienced the same volume in 2017 compared to 2016.
- Compared to 2016, 10 percent fewer businesses expect to see an increase in 2018. Only 47 percent are expecting an increase.
- Worker shortage is an issue for tourism businesses with one-third experiencing a shortage in the third quarter busy season. Even 10-11 percent of business owners experienced worker shortages in 1st and 4th quarters. Twenty-three percent were short workers in the 2nd quarter.
- Numerous respondents to this survey do not hire employees, but of those who did, 22 percent said a high school education was all that was needed for both full-time and seasonal employment. About 17 percent of respondents hire employees with two or four-year degrees from Montana institutions.
- Many respondents said the skills lacking in current employees are ones that are not taught in learning institutions: work ethic, attitude, common sense, motivation, and people skills.
- Programs/degrees/certificates most desired by Montana business owners for which they could hire from are hospitality, marketing, management, and culinary.
- Fifty-six percent of all Montana tourism businesses said their visitor volume decreased during the 2017 wildfire season.
- Many respondents do not see how they can adapt to the wildfire season, but some suggested:
 - We need better communication around the state as to where there is not smoke/fire to encourage visitors to go there;
 - Advertise and promote indoor activities;
 - Fire-proof their property;
 - Install air conditioning or air filtration systems;
 - Diversify their offerings and have properties in various parts of the state.
- Suggestions on how the Montana tourism industry could adapt to wildfires included:
 - There's nothing we can do;
 - Create a visitor friendly interactive map that shows visitor where they can do their activity without fear of fire or smoke. Make communication to visitors seamless;
 - The industry should lobby our elected officials to better manage the forests, provide enough funding to fight fires from a separate budget of the forest service, and to reduce fossil fuel use and promote clean energy by all industries in Montana.

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Introduction

Every year the Institute for Tourism and Recreation Research conducts a survey of tourism businesses around Montana regarding how the current year treated them, what the next year looks like for business, and various topic areas of interest. This report reflects on 2017 and looks at business outlook for 2018.

Purpose

The purpose of this report was to assess the current conditions and issues seen in the tourism industry as well as project what 2018 will be like for the tourism businesses.

Methods

Montana tourism businesses were sent an email mid-October, 2017 with the survey link. A reminder email was sent one week later, followed by a final reminder 3 days after the first one. The list of businesses is generated from attendees at the annual Montana governor’s Conference on Tourism and Recreation. Any new attendees are added to the list from previous years.

Limitations

This study was limited to those businesses who received the email and decided to answer the questions. The list who received the emails is not a comprehensive list of all tourism businesses in the state. In addition, there were no responses from 10 of Montana’s 56 counties: Blaine, Broadwater, Daniels, Deer Lodge, Golden Valley, Liberty, Petroleum, Powder River, Treasure, and Wibaux.

Survey Response

Emails were sent to 3,769 addresses. Approximately 862 bounced back as undeliverable allowing for 2,907 to potentially be delivered. As in all on-line survey techniques, many email messages also end up in the junk box or are never opened by the recipient therefore it is impossible to calculate an exact response rate. This study received 358 completed surveys representing a wide range of businesses around the state (Table 1). The survey can be found in Appendix A.

Table 1 – Survey respondents by main business type

Business Type	% of Respondents	Business Type	% of Respondents
Hotel/motel	25%	Specialty retail*	2%
Other	17%	General retail	2%
Rental home/condo/cabin	16%	Rental management	2%
Tourism promotion/ad agency	10%	Bed & Breakfast	2%
Outfitter/guide	9%	Vehicle rental	2%
Museum/Interpretive center	3%	Ski resort	2%
Land Management	3%	Brewery/distillery	1%
Event Coordinator/manager	3%	Convenience/gas store	1%
Restaurant/bar	2%	Airline/airport	1%

*Specialty retail (fishing, hunting, outdoor gear, etc.)

Results

The results are divided into four content areas. First is the account of how 2017 was for the tourism businesses around the state and what they think 2018 will hold for them. The second topic area encompasses a few questions related to employees. Third is the response to how the 2017 fire season impacted their business and what may be done in the future to adapt to wildland fires. The final topic area relates to educational needs of employees in the tourism businesses of Montana.

2017 volume and 2018 expectations

Tables 2 and 3 show that businesses in 2017 had a mixed reaction to their year. Forty-eight percent had an increase but 30 percent showed a decrease over 2016. Of those with an increase in visitor volume, 42 percent of the businesses said they increased 10 percent or more than 10 percent. Of those with a decrease in visitor volume, 36 percent they decreased 10 percent or more than 10 percent.

Table 2: Percent change in visitation/customer volume in 2017 versus 2016

Change in visitor Volume 2017 vs 2016		
	N	%
Increased	171	48%
Decreased	109	30%
Stayed the same	78	22%

Table 3: Percent of increase or decrease in visitor volume

	If Increase (48%, N=171)		If Decrease (30%, N=109)	
	n	%	n	%
1% or less	4	2%	3	3%
2%	18	11%	9	8%
3%	15	9%	12	11%
4%	7	4%	6	6%
5%	33	20%	12	11%
6%	6	4%	2	2%
7%	3	2%	9	8%
8%	6	4%	6	5%
9%	4	2%	19	17%
10%	28	17%	31	28%
More than 10%	42	25%	9	8%

Businesses also varied in their revenues for 2017 with 49 percent seeing an increase in revenue, 30 percent seeing a decrease in revenue, and 20 percent on par with the previous year (Table 4).

Table 4: Change in business revenue for 2017

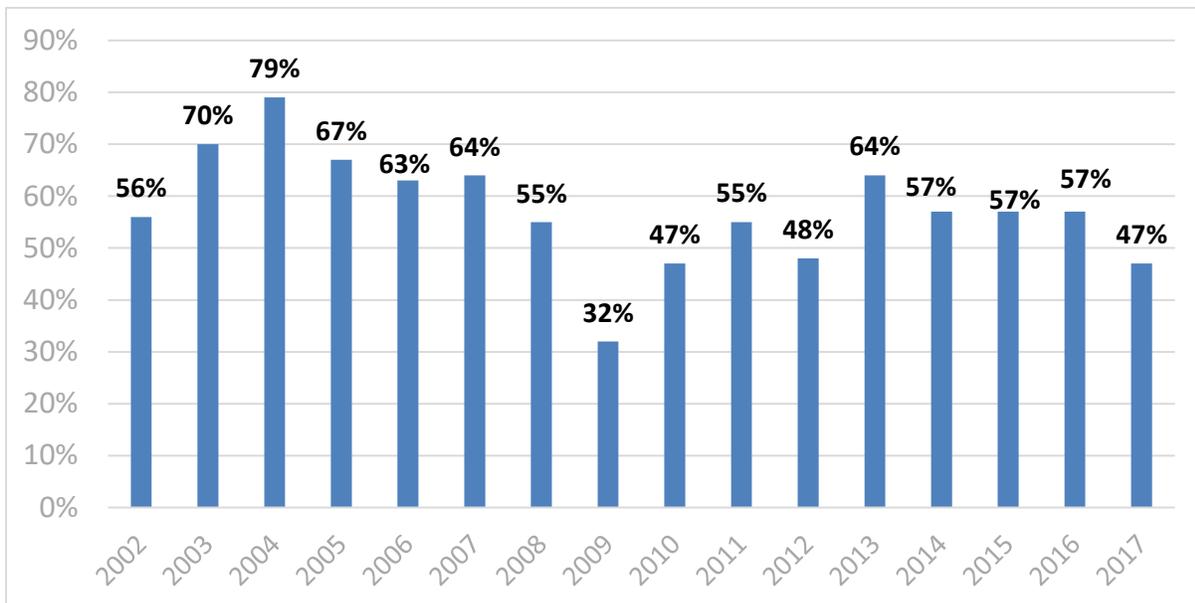
Change in Revenue - 2017 vs 2016		
	N	%
Increased < 5%	65	18%
Increased 5% or more	110	31%
Stayed the same	70	20%
Decreased < 5%	39	11%
Decreased 5% or more	67	19%

Table 5 shows what is anticipated for 2018 in terms of visitor volume. While only eight percent expect a decrease, less than half (47%) expect an increase in volume in 2018. When comparing that number to previous years (Figure 1), optimism for 2018 is lower than usual. Only in the height of the great recession (2009) was optimism lower than this year's business projection for 2018.

Table 5: Anticipated visitor/customer volume change for 2018

2018 projection of visitor volume		
	N	%
Expect an increase	169	47%
Expect a decrease	30	8%
Expect to stay the same	159	44%

Figure 1: Percent of tourism businesses who expect an increase for the next year – 2002 through 2017 expectations



Employee Challenges

This short section dealt with two questions related to hiring employees. First the J-1 Visa program allows foreign workers to come work in the U.S. as a cultural and learning exchange. In 2016 (most recent data at time of publication), Montana hosted 2,741 J-1 Visa workers/students with 70 percent of those being summer work travel participants¹. While 85 percent of our business survey respondents said they don't hire J-1 workers, most of those who do, said changes in the program has been making it difficult to get these workers, a workforce they rely on (Table 6).

Table 6: Impact of changes in J-1 Visa program affecting ability to hire international workers

Impact of changes in J-1 Visa program		
	N	%
Not applicable/do not hire J-1 people	298	85%
Very difficult	12	3%
Moderately difficult	16	5%
Slightly more difficult	17	5%
Slightly easier	6	2%
Much easier	2	1%

The second question in this content area asked whether or not businesses experienced worker shortages in 2017 and if so, what quarters those shortages occurred (Table 7 and 8). A majority (61%) of businesses said they had a shortage of workers with quarters 2 and 3 being most problematic for finding and keeping workers (23% and 32% respectively). It is notable that one-third of all businesses had a worker shortage problem in the busy summer travel season. As one owner pointed out in the comment section, she didn't have a day off from May 15 to October 15 because she couldn't find enough workers.

Table 7: Tourism business with worker shortages in 2017

Worker shortages		
	N	%
Yes	215	61%
No	138	39%

Table 8: Quarters in which tourism businesses had worker shortages

Which quarters did you experience a shortage?			
Q1	Q2	Q3	Q4
10% (n=35)	23% (n=82)	32% (n=115)	11% (n=40)

¹ <https://j1visa.state.gov/basics/facts-and-figures/>

Wildfire Season Impacts

In this topic area we asked respondent to tell us how the wildfire season affected their business volume, revenue, cancellations, and how their business and the tourism industry could adapt to fire season.

As shown in Table 9, seven percent of businesses in Montana indicated they did not have smoke or fires in their area. Fifty-six percent of tourism businesses said wildfires decreased their business volume, while 26 percent had no change in volume due to fires. Twelve percent experienced an increase in volume, many indicating it was because they housed firefighters.

Twenty-five percent of businesses had to cancel or postpone an event due to fires or smoke and 13 percent had to cancel guided trips (Tables 10 and 11).

Table 9: 2017 wildfire impact to tourism business volume

Impact of 2017 wildfires on tourism business volume		
	N	%
N/A (no smoke or fires in my area)	25	7%
No change in volume	93	26%
Decreased a lot	40	11%
Decreased moderately	62	18%
Decreased slightly	94	27%
Increased slightly	23	7%
Increased moderately	9	3%
Increased a lot	8	2%

Table 10: Businesses who cancelled or postponed events due to wildfires/smoke

Cancellations or postponement of events		
	N	%
No cancellations	217	61%
Cancelled or postponed	88	25%
N/A	53	15%

Table 11: Number of businesses who cancelled guided trips

Cancellations of guided trips		
	N	%
No cancellations	189	54%
Cancelled trips	47	13%
N/A	116	33%

Finally, we asked people to tell us their views in an open-ended question about adaptation to fires for their business and for the tourism industry.

Adaptions to fire/smoke your business could make to be resilient in wildfire season

There were 135 respondents who wrote in answers to what their business could do to adapt to wildfire season. The largest response category was, “there is nothing I can do.” The following is a categorization of all responses:

- 40 respondents said: there was nothing they could do; that Mother Nature will do what it will do; or they simply don't know what adaptations they could make in their business.
- 10 respondents said to encourage and advertise indoor activities such as museums, galleries, wineries/distilleries/breweries, shopping, and restaurants.
- 7 respondents said they could fire-proof their property.
- 7 said they should know where to avoid the fires/smoke and tell folks where those places are.
- 7 said they did or could put in air conditioning, air filtration systems, or offer respirators.
- 5 suggested they could provide indoor events, tours, or other types of activities.
- 4 respondents said get better information to the media, and another 4 said to allow logging.
- 3 each said: educate people that fires are natural; post fire updates for visitors; have a crisis communication plan and evacuation & contingency plans; book more in the shoulder seasons.
- 2 each said: discuss with visitor that climate change is human caused; move away; reduce fossil fuels and convert to clean energy.
- 1 each said: attract the fire fighters to stay in their facility; avoid trips in August; tell folks we're open for business and what the available activities are; book more trips in July; make customers buy trip insurance; diversify my product; enforce restrictions on air quality alerts; need insurance options; start a nonrefundable cancellation policy; be flexible with guests' changes and don't charge extra; get a metal roof; do fire camp tours; provide more rental cars to firefighters; implement our own fire restrictions; buy property elsewhere so we can shift guests to another spot; pray the wind blows in the right direction.

A few of the full comments are provided below.

“Need to have well ventilated area's and give alternative activities for the visitors besides outdoor events.”

“People are afraid for their health and want to be able to see. If they had correct information on the conditions in the area, instead of incorrect information from the news, they would have realized the smoke did not impact our area as badly as others.”

“We rerouted our horseback riding trails and changed our hours to prevent people and horses from being out in the smoke in the heat of the day. We had to lay off much of our staff as our business literally fell off a cliff.”

Adaptions to fire/smoke the tourism industry could make to be more resilient in wildfire season

There were 141 different people who wrote in their views on what the tourism industry could do to adapt to wildfire season. Some of the comments below are long term ideas and solutions, some are

short term solutions, and some are not related to the tourism industry specifically. The following is a categorization of all responses:

- 36 respondents said: there was nothing the industry could do; that Mother Nature will do what it will do; or they simply don't know what adaptations the industry could make.
- 21 respondents suggested that the industry create the resources to tell folks where to visit (smoke free, things to do, etc.) and have better partnerships within the state for good communications. In addition, 4 people mentioned that the industry could develop a visitor friendly interactive fire and smoke map since most people don't know where things are actually happening and the names of fires or nearby small towns mean nothing to them.
- 21 respondents encourage better forest management that would allow logging and clearing out deadwood trees.
- 10 said there is a need for the industry to better inform the media about what is really happening, the accuracy of where fires and smoke are actually occurring, and to suggest better ways to communicate to eliminate the fear and drama that media portrays. In addition one person suggested that the industry educate individual journalists/editors in how their misleading articles/headlines affect the bottom line of small businesses in the state.
- 6 said we should not let the forests burn and to fight the fires immediately.
- 5 mentioned a need for a common place to find and post fire and smoke updates for visitors.
- 5 said the industry should promote the shoulder and 'non-fire' seasons more.
- 4 suggested the industry should lobby our congressmen and government to have fire suppression paid for by FEMA or some other budget line and not take it from the forest service. Trails, campgrounds and other recreation resources on forest service lands in Montana are being neglected due to the lack of enough funding which ultimately hurts the tourism industry.
- 4 people said we need a communication plan (crisis plan) as well as evacuation and contingency plans.
- 4 respondents said the fires provide a good time to mention that climate change is being impacted due to humans.
- 4 respondents said it is time to reduce our fossil fuel consumption and for Montana to move to clean energy. Three additional respondents noted that the tourism industry should lobby for cleaner energy use and support electric car stations, local agriculture, and convince policy makers that clean air is necessary for the tourism industry to succeed.
- 2 each said: Tell folks we're open for business; diversify; offer free respirators or masks; create educational messages about human causes of fire such as campfires, cigarettes, hot mufflers, etc. to discourage this reckless behavior.
- 1 each said: Establish a fund to compensate folks in the tourism industry who can demonstrate a loss of revenue due to fire and smoke; during bookings, tell folks about the possibility of fires; have informative kiosks about the fire cycle, people who fight fires, and the community resiliency to fires in their town; promote long-term statewide water conservation and educate both residents and visitors about water consumption; control backcountry use; follow expert guidelines and accept controlled burns; don't allow counties to dictate when state and federal recreation areas can be used; fire-safe all property; lobby for better forest management; the forest service should educate people on how to fire-safe their property; offer public meet-ups and awareness campaigns for people involved in fires; after the fires, have volunteer tourism efforts to help in recovery; provide recovery grants; lobby for consistent firefighting budgets (state and federal).

A few of the full comments are provided below.

“Continue PR efforts that tell the real story. Put pressure on media not to exaggerate and emphasize how bad the fire situation/impacts are. Headlines can be so damaging.”

“Have a way to keep visitors up-to-date on fire conditions. A lot of the fire reports are so specific that many visitors might not even know where fires are actually burning or what is closed and what is open. A lot of times giving GPS coordinates isn't going to help most people who are visiting the area, it would be more helpful to provide distances to popular locations, would be even better if they were accompanied by good maps.”

“We MUST become very active in the political discussion regarding climate change. We can expect to see more and more drought and extreme fire seasons. Climate change is real and Montana could be a leader with respect to tourism. We need to acknowledge it, shift our seasons to accommodate it, and work to institute change in our culture to prevent further damage and mitigate that which has already been done. Tourism must work actively with land management agencies to alter some land management practices relative to tourism. For example, our Forest Service Special Use permit does not go completely into effect until June of each year, yet our springs are arriving sooner and sooner. Our tourism season is shifting towards spring when people can count on not being caught up in wild fires - and land management agencies need to adjust their regulations accordingly.”

Post-high school education in the tourism work place

This topic area asked questions related to education level needs of their workforce as well as how they work with high schools, community colleges, tribal colleges or 4-year universities for their employees. As shown in Table 12, only 17 percent of respondents have worked with educational institutions. Many of those use college interns, advertise open positions at the universities, and hire directly from the universities and community colleges.

Table 12: Tourism businesses who have worked with schools to develop workforce or train employees

Worked with schools	N	%
No	294	83%
Yes	59	17%

Forty-eight respondents answered the open-ended question, “**How do you currently work with educational institutions?**”

- 11 said they use college intern students, mostly from UM
- 8 mentioned they advertise their open positions at the universities
- 6 said they hire local high school students in their community
- 6 said they hire directly from UM, MSU, and community college
- 5 mentioned MSU and various programs they hire from
- 3 said they contract with universities for research

- 3 indicated using students for projects in their business
- 2 each mentioned working with Missoula College and tribal colleges; provide scholarships for students
- 1 each said use of continuing education courses; AmeriCorps; job shadowing; mentoring; and career tours

More than half (55%) indicated that their firm’s employment of college graduates has not changed in the past few years but 30 percent responded that they didn’t know. Twelve percent said they had increased hiring of college graduates (Table 13).

Table 13: Employment of college grads by tourism businesses

Change in college graduate employment in firm		
	N	%
Increased over the past few years	40	12%
No change over the past few years	188	55%
Decreased over the past few years	13	4%
Don’t know	101	30%

When asked about the type of education their *year-round* employees had, 22 percent mentioned a high school diploma and 43 percent indicated they didn’t hire year-round employees. That leaves nine percent who hire from a Montana four-year university, two percent from a Montana two-year program and six percent hiring a mix of two and four-year programs. As many as eight percent said they hire very few from Montana institutions (Table 14). In the comment section a couple of respondents lamented the lack of a work ethic from Montana students so they will now hire out-of-state college graduates.

Table 14: Type of education for year-round employment at tourism businesses

Year-round employment – education credentials		
	N	%
High school diploma	75	22%
A two-year program or community college in Montana	7	2%
A four-year program or university in Montana	31	9%
A mix of two and four year programs from Montana institutions	21	6%
Very few from Montana institutions	29	8%
Don’t know	35	10%
N/A do not hire year-round employees	151	43%

Twenty-two percent of businesses who hire seasonal employment use individuals with a high school diploma, while 16 percent use those from a 4-year Montana university or a mix of 2 and 4-year students from Montana institutions (Table 15).

Table 15: Type of education for seasonal employment at tourism businesses

Seasonal employment – education credentials		
	N	%
High school diploma	76	22%
A two-year program or community college in Montana	5	1%
A four-year program or university in Montana	29	8%
A mix of two and four year programs from Montana institutions	27	8%
Very few from Montana institutions	44	13%
Don't know	45	13%
N/A do not hire seasonal employees	124	35%

Table 16: Does MT higher education institutes provide enough qualified employees

Enough qualified students from MT higher education institutions	N	%
No	57	17%
Yes	130	39%
N/A (don't hire employees)	149	44%

Forty-two respondents completed the open ended question of **“What skills or knowledge are lacking from Montana students?”**

- 8 mentioned work ethic
- 8 said hospitality and people skills
- 5 said attitude and motivation
- 3 mentioned aptitude
- 3 highlighted no need for college education
- 2 each said: maintenance skills; marketing skills; workers want more money but not work for it; common sense; software and CODE writing; written/verbal communication; interpretation of local history; tourism and sales
- 1 each said: data analysis; business plan development; landscaping; ability to dress well for the job; giving basic directions; graphic design; hotel mgmt.

There were 101 respondents who answered the question, **“What degrees, programs or certificates does your business need more of from Montana higher education institutions?”**

- 29 mentions of hospitality with people skills
- 19 said they didn't need degrees or certificates of those they hired, or they were a one-person business
- 9 each said business management; marketing; or culinary
- 5 want people with degrees in common sense and work ethic
- 5 each said interpretive guide certificates; sales; communications; coding/software; or tourism
- 4 desire degrees in outdoor recreation
- 3 each said event management; fine arts; hotel management; or accounting

- 2 each said social media; Native American/heritage tourism; performing arts; journalism; 1st aid; web design; ranch management; planner; wildlife science; trades; or resource management
- 1 each said public administration; entrepreneurship; STEM; coast guard certification; mechanics; chemistry; nonprofit administration; filming; public policy; pool/spa certificate; climbing guide; or zoology

One respondent had a very long explanation of all the tourism business needs.

“We definitely need plumbers, roofers, hardwood floor specialist, electricians, and maintenance workers of all kinds. Our plumbers are booked year-round and say that when they drive to remote areas, people come running when they see their truck! This may be more of a high-school apprenticeship program, or 2 year degree program (In my high school way back then, we could get credit for working such a job, and were able to leave at noon each day. Made small salary, but even better, got to leave school and had work credentials and experience before leaving high school. Ended up getting college degree, but that work experience meant almost as much). I would think that small businesses of this type would love to have paid or unpaid interns. As far as colleges, we do need more professional workers--attorneys, accountants, property appraisers, restaurant managers, etc. Again, a summer internship program (paid or unpaid) would be a great asset to our small community in Park County, and may be very beneficial to the student, the business, and the community.”

Finally, a comment section at the end of the survey provided respondents an opportunity to discuss the issues in more detail. These comments are provided in full in Appendix B.

Conclusions

It was a tough year for nearly half of Montana tourism businesses. But it could have been much worse. July saw record visitation for Glacier National Park, and if it weren't for the fires in August and September, the state might have set records in visitation and spending by nonresidents. As it turned out, preliminary numbers for the year show a flat number of visitors over 2016 but an increase in visitor spending.

Those averages across the entire state, are just that...averages. There were many business directly in the path of fires and smoke who will suffer for a number of years. Some even said they are going out of business. So, while it was a good year on average, it seems that the tourism industry and individual businesses need to re-evaluate how they will adjust, adapt, and prepare for a season that may not be as good as previous years.

Suggestions on how to adapt to fire season ranged from solutions of the very short term like telling visitors where they can still enjoy Montana without smoke, to acknowledging the long term solutions needed for Montana and the rest of the world regarding climate change. A number of respondents said we need to lobby our elected officials at both the state and national levels to push for clean energy solutions and reduce our need for fossil fuels. Without addressing this bigger issue, large wildfires around the west will be more common place than they are today.

One other issue that needs serious discussion is that of worker shortages in the tourism industry. Montana has an aging population meaning there are fewer high school and college aged people to hire

during the busy summer season. Where are more workers going to come from? Much of the tourism industry is a seasonal business with a high number of employees needed in a 3-month timeframe. This problem is not going away unless people in the industry get together and formulate solutions or adjust their employee needs.

Appendix A: Survey instrument

Hello Montana tourism-related business owners and managers!

You are being sent this quick survey because you may have attended the Governor’s Conference on Tourism and Recreation or have a business listing with the Montana Office of Tourism and Business Development. This is a very short survey! It might take you 4 minutes to complete. Your answers to this survey will be confidential, and all results will be presented in the aggregate. The results, along with other new tourism information, will be presented by Norma Nickerson, ITRR Director, at the Outlook Seminars with the Bureau of Business and Economic Research in early 2018 and published on the ITRR website at www.itrr.umt.edu. Thank you for your time. If you have any questions concerning this project, please call the ITRR office at 406-243-5686.

In which **county** is your business/employment? _____

Which best describes your employment?

1. Owner of a business
2. Owner of a nonprofit organization
3. Employee of a business
4. Employee of a governmental organization/Agency
5. Employee of a nonprofit organization
6. Other

Which of the following represents your type of business(s) or work (check all that apply)?

- | | |
|--|---|
| <ol style="list-style-type: none"> 1. Hotel/motel 2. Bed & Breakfast 3. Rental home/condo/cabin 4. CAMPGROUNDS (added for 2019 Outlook) 5. Restaurant/bar 6. Brewery/distillery 7. Convenience store/gas station 8. Auto repair 9. Airline/airport 10. Specialty retail (fishing, hunting, outdoor gear, etc.) | <ol style="list-style-type: none"> 11. General retail 12. Outfitter/guide 13. Vehicle rental (car/truck/RV) 14. Casino 15. Museum/interpretive center 16. Ski resort 17. Land management 18. Rental management 19. Tourism promotion/advertising agency 20. Event coordinator/manager |
|--|---|

Trends and Outlook

How did your visitation/customer volume change in 2017 versus 2016?

1. Increased
2. Decreased
3. Stayed the same

Please estimate the percent increase you had in 2017 compared to 2016.

- | | | |
|---------------|-------|-------------------|
| 1. 1% or less | 5. 5% | 9. 9% |
| 2. 2% | 6. 6% | 10. 10% |
| 3. 3% | 7. 7% | 11. More than 10% |
| 4. 4% | 8. 8% | |

Please estimate the percent decrease you had in 2017 compared to 2016.

- | | | |
|---------------|-------|-------------------|
| 1. 1% or less | 5. 5% | 9. 9% |
| 2. 2% | 6. 6% | 10. 10% |
| 3. 3% | 7. 7% | 11. More than 10% |
| 4. 4% | 8. 8% | |

How did your revenue change in 2017 versus 2016?

1. Increased
2. Decreased
3. Stayed the same

Please estimate the percent revenue increase you had in 2017 compared to 2016.

- | | | |
|---------------|-------|-------------------|
| 1. 1% or less | 5. 5% | 9. 9% |
| 2. 2% | 6. 6% | 10. 10% |
| 3. 3% | 7. 7% | 11. More than 10% |
| 4. 4% | 8. 8% | |

Please estimate the percent revenue decrease you had in 2017 compared to 2016.

- | | | |
|---------------|-------|-------------------|
| 1. 1% or less | 5. 5% | 9. 9% |
| 2. 2% | 6. 6% | 10. 10% |
| 3. 3% | 7. 7% | 11. More than 10% |
| 4. 4% | 8. 8% | |

Looking ahead to 2018, how do you anticipate visitation/customer volume will change?

1. Increase
2. Decrease
3. Stay the same

Employee Challenges

To what extent have the changes in the J-1 Visa program affected your ability to hire international workers? The changes have made it...

1. Not applicable/do not hire J-1 people
2. Impossible
3. Very difficult
4. Moderately difficult
5. Slightly more difficult
6. Slightly easier
7. Moderately easier
8. Much easier

Has your business had a shortage of workers at any time in 2017?

1. No
2. Yes (If yes, please select which quarters the shortage occurred)
 - a. Quarter 1 (Jan-Mar)
 - b. Quarter 2 (Apr-Jun)
 - c. Quarter 3 (Jul-Sep)
 - d. Quarter 4 (Oct-Dec)

Wildfire Season impacts

This was a difficult fire year for the state of Montana. We are interested in how (if at all) the wildfire season affected your business.

How did the wildfire season affect your business in terms of the **volume** of customers/visitors?

- | | | |
|---------------------------------------|-------------------------|-------------------------|
| 1. N/A (No smoke or fires in my area) | 3. Decreased moderately | 6. Increased slightly |
| 2. Decreased a lot | 4. Decreased slightly | 7. Increased moderately |
| | 5. No change in volume | 8. Increased a lot |

Did you have to cancel or postpone events due to the wildfire season?

1. No
2. Yes
3. N/A

Did you have to cancel guided trips due to the wildfire season?

1. No
2. Yes
3. N/A

What adaptations to fire and smoke do you think your business could make to be resilient in the wildfire season?

What adaptations to fire and smoke do you think the tourism industry could make to be resilient in the wildfire season?

Higher Education

This year the Outlook theme is related to [post-high school education](#) in Montana.

Has your business worked with a local school, community college, or a university in Montana in the past five years to develop your workforce or train employees?

1. No
2. Yes (If yes, please explain how)

Overall, how has your firm's employment of college graduates changed in the past five years?

1. Increased over the past few years
2. No change over the past few years
3. Decreased over the past few years
4. Don't know

From which education level in Montana does your business get the most employees?

1. High school diploma
2. Two-year program or community college in MT
3. Four-year program or university in MT
4. A mix of both from MT institutions
5. Very few from either MT institutions
6. Don't know
7. We get most of our employees from outside of Montana

Would you say that Montana's higher education institutions are providing enough qualified employees for your business or not enough qualified employees for your business?

1. Enough qualified employees for your business
2. Not enough qualified employees for your business
3. Don't know

What degrees, programs or certificates does your business need more of from Montana higher education institutions?

Do graduates of Montana's higher education have the knowledge and skills your business needs?

1. No (please specify what skills or knowledge they are lacking)
2. Yes

Please comment on any of the themes asked about today (outlook, employee challenges, education, or fire/smoke).

Appendix B: Data by Travel Region

Counties where respondents represent tourism businesses

Glacier (n=107)	Southwest (n=72)	Central (n=37)	Yellowstone (n=86)	Missouri (n=12)	Southeast (n=41)
Flathead (44)	Beaverhead (10)	Cascade (14)	Carbon (8)	Garfield (1)	Big Horn (3)
Glacier (6)	Granite (6)	Choteau (4)	Gallatin (42)	McCone (1)	Carter (1)
Lake (7)	Jefferson (3)	Fergus (2)	Park (27)	Phillips (1)	Custer (2)
Lincoln (5)	Lewis & Clark (20)	Hill (1)	Stillwater (5)	Richland (3)	Dawson (2)
Mineral (1)	Madison (22)	Judith Basin (4)	Sweet Grass (4)	Roosevelt (1)	Fallon (1)
Missoula (32)	Powell (3)	Meagher (3)		Sheridan (1)	Musselshell (1)
Ravalli (8)	Silver Bow (8)	Pondera (1)		Valley (4)	Prairie (1)
Sanders (4)		Teton (6)			Rosebud (10)
		Toole (1)			Yellowstone (29)
		Wheatland (1)			

Volume change in visitation 2017 vs 2016

	Glacier	Southwest	Central	Yellowstone	Missouri	Southeast
Increased	51% (55)	50% (36)	41% (15)	55% (47)	17% (2)	34% (14)
Decreased	26% (28)	26% (19)	35% (13)	22% (19)	58% (7)	56% (23)
Same	22% (24)	24% (17)	24% (9)	23% (20)	25% (3)	10% (4)

Revenue change 2017 vs 2016

	Glacier	Southwest	Central	Yellowstone	Missouri	Southeast
Increased < 5%	16% (17)	24% (17)	19% (7)	21% (17)	8% (1)	13% (5)
Increased 5% +	34% (35)	35% (25)	24% (9)	39% (32)	8% (1)	18% (7)
Stayed the same	19% (20)	22% (16)	16% (6)	24% (20)	17% (2)	15% (6)
Decreased < 5%	14% (15)	8% (6)	14% (5)	6% (5)	17% (2)	15% (6)
Decreased 5% +	16% (17)	11% (8)	27% (10)	11% (9)	50% (6)	40% (16)

2018 Expectation in volume change compared to 2017

	Glacier	Southwest	Central	Yellowstone	Missouri	Southeast
Increase	56% (60)	53% (38)	41% (15)	47% (40)	25% (3)	27% (11)
Decrease	5% (5)	6% (4)	3% (1)	9% (8)	25% (3)	22% (9)
Same	39% (42)	42% (72)	57% (37)	44% (38)	50% (6)	51% (21)

Impact of changes in J-1 Visa program affecting ability to hire international workers

	Glacier	Southwest	Central	Yellowstone	Missouri	Southeast
Not applicable	86% (91)	91% (64)	94% (34)	80% (67)	75% (9)	76% (31)
Very difficult	4% (4)	3% (2)	---	4% (3)	8% (1)	5% (2)
Moderately difficult	4% (4)	1% (1)	---	10% (8)	8% (1)	5% (2)
Slightly more difficult	5% (5)	1% (1)	6% (2)	5% (4)	---	12% (5)
Slightly easier	9% (1)	3% (2)	---	1% (1)	8% (1)	2% (1)
Much easier	9% (1)	---	---	1% (1)	---	---

Percent of business with worker shortage and quarters of shortage

	Glacier	Southwest	Central	Yellowstone	Missouri	Southeast
Yes, shortage	34% (36)	34% (24)	44% (16)	37% (31)	42% (5)	60% (24)
% Q1	19% (7)	17% (4)	36% (6)	30% (9)	---	30% (7)
% Q2	44% (16)	65% (15)	38% (6)	70% (21)	60% (3)	83% (19)
% Q3	89% (32)	91% (21)	81% (13)	83% (25)	100% (5)	74% (17)
% Q4	22% (8)	26% (6)	33% (10)	33% (10)	---	48% (11)

Impact of wildfire season on business volume

	Glacier	Southwest	Central	Yellowstone	Missouri	Southeast
N/A (no smoke or fires in my area)	1% (1)	6% (4)	8% (3)	14% (12)	17% (2)	5% (2)
No change in volume	10% (11)	31% (22)	32% (12)	41% (34)	25% (3)	27% (11)
Decreased a lot	24% (26)	4% (3)	3% (1)	4% (3)	---	17% (7)
Decreased moderately	23% (25)	21% (15)	14% (5)	13% (11)	8% (1)	10% (4)
Decreased slightly	30% (32)	27% (19)	32% (12)	21% (18)	42% (5)	20% (8)
Increased slightly	6% (6)	7% (5)	5% (2)	5% (4)	8% (1)	12% (5)
Increased moderately	2% (2)	3% (2)	5% (2)	2% (2)	---	2% (1)
Increased a lot	4% (4)	1% (1)	---	---	---	7% (3)

Canceled or postponed events due to wildfire season

	Glacier	Southwest	Central	Yellowstone	Missouri	Southeast
Yes	47% (50)	18% (13)	6% (5)	6% (6)	17% (2)	20% (8)
N/A	12% (13)	21% (15)	5% (2)	17% (15)	8% (1)	17% (7)

Canceled guided trips due to wildfire

	Glacier	Southwest	Central	Yellowstone	Missouri	Southeast
Yes	26% (27)	11% (8)	8% (3)	5% (4)	---	10% (4)
N/A	39% (40)	37% (26)	16% (6)	32% (85)	17% (2)	36% (15)

Percent of businesses who have worked with local schools, community colleges, or universities

	Glacier	Southwest	Central	Yellowstone	Missouri	Southeast
Yes	19% (20)	17% (12)	17% (6)	11% (9)	17% (2)	22% (9)

Employment of college graduates by tourism businesses over the past few year

	Glacier	Southwest	Central	Yellowstone	Missouri	Southeast
Increased	13% (13)	16% (11)	17% (6)	5% (4)	8% (1)	10% (4)
No change	60% (62)	46% (31)	56% (20)	56% (44)	67% (8)	56% (23)
Decreased	4% (4)	3% (2)	3% (1)	4% (3)	---	7% (3)
Don't know	24% (25)	35% (24)	25% (9)	35% (28)	25% (3)	27% (11)

Type of education for YEAR-ROUND employment at tourism businesses

	Glacier	Southwest	Central	Yellowstone	Missouri	Southeast
High school	19% (20)	19% (13)	28% (10)	9% (7)	50% (6)	45% (18)
2-yr. program	2% (2)	---	8% (3)	3% (2)	---	---
4-yr. program	9% (10)	13% (9)	3% (1)	7% (6)	---	10% (4)
2 & 4-yr. prog.	8% (9)	3% (2)	11% (4)	5% (4)	---	5% (2)
Few from MT	9% (10)	11% (8)	---	11% (9)	8% (1)	3% (1)
Don't know	10% (11)	13% (9)	3% (1)	12% (10)	8% (1)	8% (3)
N/A	42% (45)	41% (29)	47% (17)	53% (43)	33% (4)	30% (12)

Type of education for SEASONAL-ROUND employment at tourism businesses

	Glacier	Southwest	Central	Yellowstone	Missouri	Southeast
High school	20% (21)	14% (10)	28% (10)	12% (12)	42% (5)	40% (16)
2-yr. program	2% (2)	3% (2)	---	1% (1)	---	---
4-yr. program	9% (10)	11% (8)	6% (2)	5% (4)	8% (1)	10% (4)
2 & 4-yr. prog.	8% (9)	6% (4)	14% (5)	6% (5)	8% (1)	8% (3)
Few from MT	8% (9)	16% (11)	8% (3)	20% (16)	---	13% (5)
Don't know	19% (20)	7% (5)	6% (2)	13% (11)	25% (3)	10% (4)
N/A	34% (36)	43% (30)	39% (14)	40% (33)	17% (2)	20% (8)

Enough qualified students from MT higher education institutions?

	Glacier	Southwest	Central	Yellowstone	Missouri	Southeast
N/A (don't hire)	39% (40)	50% (33)	43% (15)	49% (39)	46% (5)	38% (15)
Yes	39% (40)	44% (29)	49% (17)	29% (23)	36% (4)	43% (17)
No	22% (23)	6% (4)	7% (3)	22% (17)	18% (2)	20% (8)

Appendix C: Comments provided at end of survey

Please comment on any of the themes asked about today

<p>**Management of our forestry areas is a must - Not in the treehugging way....Not in clear cutting way... remove what's dead and dying...crap that has been blown down due to wind-storms - REMOVE THE FUEL - MANAGE IT or IT MANAGES US. **J-1 program is looking to be a life saver for our business after we have housing for them.... Get our Americans off the welfare system that seems to be just handed out to every Tom/Dick/Harry out there - get them into the work place again... Flathead county has TONS of jobs - none great paying but no work-force willing to get out there and work because they make more sitting on the couch at home....I KNOW THIS TO BE A FACT.. THE PREVIOUS 9 employees have all stated in some way fashion form or the other to this situation. We do need more skilled labor jobs etc. in the Flathead but we also have a huge need for un-skilled labor... Unfortunately for us we are 10miles East of West Glacier - Nyack Flats - it's hard to get people that are willing to drive 20-30miles for \$11 an hour. But that is our issue...it would make us more appealing if that welfare system was tightened up and utilized more as a short-term hand-up than a full-time job and hand-out..... My \$.22cents.</p>
<p>About half of employees are retired seniors that need extra income. Do not get many high school or higher education applicants to apply and those that do not like the work and leave as soon as they can.</p>
<p>After this year's fire and smoke season, considering closing my warm season B&B.</p>
<p>Answered that in a previous question. A theme certainly worth promoting in the "tourist" industry, given how fast wildness areas are disappearing: https://eowilsonfoundation.org/half-earth-our-planet-s-fight-for-life/</p>
<p>Areas hit with natural disasters like New Orleans, the Atlantic coast etc. how did they turn the event into one of show casing resiliency by the communities? Share with us how they handled those impacts and what we could possibly do to help our State economy if in an area hard hit by wildfires. Last BEST place is here - Montana with open landscapes intact eco-systems! We want visitors however we also need to balance our good stewardship responsibilities so we need to identify places not open to the public for preservation purposes. We need to encourage visitors to be conservation minded and practice those expectations in wilderness areas, so we are able to offer pristine landscapes for generations to come. We could probably learn a thing or two from resort area's like Disney land and how they managed large influxes of visitors! :) Or maybe Colorado (other states that seen in their time, visitation increases to natural landscapes.)</p>
<p>As a business that operates only in the summer, fires greatly affect us. We are trying to figure out the best way to deal with them and how not to have them scare away customers while still being honest with customers about conditions.</p>

As far as vacation rentals, we have taken a huge hit that will continue, which we believe is due directly to the vacation rental advertising changes with Expedia purchasing VRBO/HomeAway. They have stated that they are now a "booking agency" versus an "advertising agency", requiring we use their credit card processor and that guest must pay them a "booking fee" of up to 10%. With 99% of our guests booking through VRBO two years ago, and now 0%, we have cancelled our contract with them and have started advertising on local sites (AllTrips Yellowstone), and with no-fee companies such as HomeEscape, and TripAdvisor. None of these are working out too well. Would love to have more advertising for vacation home rentals through a local or non-local, no-fee to guests, site. Whatever that may be. Yellowstone Country. (Have been told that the local of Chamber sites do not produce any bookings....) Maybe Montana State students can help build us a new local website that we can pay to advertise on?

As much as I would like to see tourism promoted in the State, we do need to have people living here who can fill the open positions.

At the Department of Tourism and Business Development we are just beginning at the institutional level the support of Native American tourism. (In the past it was individually supported ie. Victor Bjornberg or Indian Equity Fund). Included in this institutional support is the new Indian Country Tourism Region. It would be helpful to include in your surveys to individualize Native American as a called out component (not cultural, of other words but Native American), also include as regions in addition to counties so we can start getting a picture of Indian Country. Thanks you have great data--for example the North central Montana study--great insight into issues in rural Indian County as well. Just separate Native American as a component wherever applicable so we can watch the growth and make good decisions based on data as we move forward.

Basic, not higher, education seems to be the main problem for us. People who can write, manage their 1099 and pay taxes, and learn when we teach them.

Big Horn River is in bad shape.

Climate change is the biggest threat to Montana's tourism industry and must be addressed.

Climate change is huge, record snowfalls, record high and long spring runoff, record warm and dry summers, record visitation during summers, smoky late summers, early and cool fall weather, not much transition to fall.

Climate Change! We need our local, state and federal government to recognize the economic impact of climate change on our state's economy. Fires are expensive and kills tourism. Lack of snow threatens quality and length of ski seasons. Less snowpack in the mountains means less water in the rivers. Higher temperatures threaten cold water fisheries ... and if that's not enough ... the list goes on. Every state official should be screaming about what this administration is doing and not doing. Denying our EPA to have a voice on Climate Change is Criminal. The discrediting of science (denouncing 97% of all Climate Science) is really, really upsetting, yet most of our MT legislators are culprits, if not just silently complicit ... which is all the same.

Employee challenges: Common sense skills are lacking in American students and employees. No degree or level of education comes with basic skills attached. Work ethics are very low. Too much phone and social media. No communication skills. We hire more and more JI employees as we see better work ethics and they work at communicating with others.

<p>Employees: so many people will not work because it will affect their ability to receive funds from the government. So the real issue is that people have lost their passion. Drugs and alcohol have taken over their life. Legal drugs as well as illegal drugs. Alcohol is destroying people every second and it is legal to do this. With the use of medications in schools for ADD & etc. we have created a population of addicts. Not enough education on nutrition, exercise, empower, expression of their given talents with art, music etc.</p>
<p>Excessive heat and smoke severely altered this year's attendance.</p>
<p>Finding housekeeping is our biggest employment challenge.</p>
<p>Fires/smoke are a tough one. I think all answers are very long term and I don't think there is much we can do short term other than start the long term solutions. Perhaps education could become a focus for fires/smoke to tie into tourism.</p>
<p>Has the federal government entertained the idea of shifting their efforts from fighting fires to reducing the fuels?</p>
<p>High water levels/flows on the Bighorn River caused a large decrease in our business for the 2017 season. Better water management and release practices would be welcomed.</p>
<p>Hoping next year not to have so many fires that the smoke drifts into our valley and just stays for too long.</p>
<p>Housing in the Flathead Valley for seasonal or part time employees is very difficult to find. Many homeowners put their properties up on short-term rental programs such as Airbnb, thus removing it from a long term rental situation. The demand is high for long term rental properties, and the supply of them is low. The housing situation is a major challenge if the valley continues to get busier each summer. Employers need more employees, but the housing market is keeping them away. Even by bringing in J1-Visa students, it is very difficult to find them housing for the short summer season.</p>
<p>Housing is always an issue in our area if you do hire employees.</p>
<p>How to be patient when tourists are upset because they cannot see the sights, and their vacation is not what they expected. Also why we don't have all the conveniences they have in the bigger towns. How to live with the nature around you. That is a lost art.</p>
<p>I am unsure of what you want me to comment on.</p>
<p>I believe the fire season had a big impact (decrease) on the number of visitors (tourist) to the state. People do not like, let alone (breathe in) air that is brown. People worry when the sun is an orange ball in sky ---- when under normally you cannot even look at it.</p>
<p>I believe the kids coming out of college today, are expecting too much from their employer when starting their first job. Salaries, benefits, etc. I also feel there will be a slowdown in the amount of tourism business at some point in the near future. You can't keep having record setting years and think that will go on forever. Plan for some moderate years in the near future.</p>
<p>I have had a presence on the State of Montana's Tourism website for 8 years. I have received 1 booking as a result of that presence. This website doesn't benefit me.</p>
<p>I lost all of September and October income due to fires. I think some of the lodging taxes we pay should be cancelled for the next quarter to help us out. I know I'm not the only one.</p>

I pray that we do not have any more fire seasons to equal this one. I do not expect anyone to vacation in such conditions. I feel that the fires could have been better managed, especially the Sprague Creek one.

I see the industry continuing to struggle with environmental problems, lack of resource protection thanks to the current administration. And less fish due to these problems, i.e. the upper Beaverhead's algae bloom problem that has decimated insect hatches and lost significant numbers of trout. The dam issues on The Madison still haven't been completed. The Lower Big Hole and Jefferson are continually dewatered due to poor irrigation practices along with several years of drought. That means warmer water and less fish year after year. That means lower client satisfaction and less return.

In general, the lack of visas and immigration issues affect business as I hire 2 people to maintain the property and they need more labor. Shortage of labor in the valley.

Interesting

It can be difficult to predict the outlook on the tourism trade. There are many factors that affect the booking of vacation rentals. It would be helpful to have access to the market strategies and advertising for increasing the bookings of vacation rentals. It is difficult to plan for the fire season. A change in forest management and fuel reductions could help to reduce the impact of the forest fires. Adequate affordable housing for employees can also effect the availability of qualified workers.

It feels like there is more demand for tourist services, so outlook is up. I think there needs to be a broader discussion and incorporation of tourism in the fire policies of the Forest Service. There seems to be fewer people interested in working (seasonally or full time). Education level is not applicable to our business.

It is becoming more difficult to find employees that want to do service jobs such as cleaning or working in the kitchen, dining room.

It is extremely difficult finding capable employees in Bozeman for a wage that I can afford to pay. I posted an ad for basic seasonal work for \$12.50 per hour and got very, very few applicants. When McDonalds is starting at \$14/ hour, it is hard to compete. This will likely be the most significant issue we will face in the future.

It would be nice to list guest ranch as a type of organization since there are a lot of us in this state. And it might be helpful for you to ask directly if our business is seasonal or year round so your information will be more accurate. For example I would love to hire more Montana collage kids but our season does not match up with their summer break. Thanks

J-1's are pretty good and really, I am not aware of changes other than no more Spring students and always that Sept 30 cut off is killer around Yellowstone. Our tourist season is May through October and help arrives only end of May. I had no days off from April 25 and now it is Oct 19. Some Americans have finished contracts with the Park and are looking for winter housing and a LITTLE work and I am so desperate to have a day off I hire them but still cannot leave until they are trained. Housekeeping is faster to train than front desk. Industry wide the average length of stay for Desk is 90 days and the learning is about that size.

lack of winter snow

Montana can/should use wildfires as an opportunity to educate the American public that wildfires are an integral and natural component of western forests, and that our fire cycles are closely related to drought caused by climate change. We should also be honest with tourists that logging/thinning have little to no effect in reducing wildfires. Extensive/excessive logging can actually damage our tourism industry.

My tours guides are people who have developed a passion on a subject. So they could be of any age group and education. But first they have to be a second generation Montana with ties to the community. My clients are not interested in hearing a southern or foreign accent.

need employees that can pass background alcohol drug testing

Need more clearing in our forests to prevent fires EVERY season!

Not all motels allow travel literature where it is easy to obtain. A good example is at the TAC in Havre. So much of our literature on many tables disappeared. The motel didn't allow literature from outside the area and if you wanted some you had to know to ask at the front desk. This is happening with several motels and not only does it keep easy access information from the visitor it also doesn't perpetuate connections with frontline staff who have the opportunity to educate visitors on attractions, events, and opportunities. This is another way visitors could be encouraged to stay an extra day.

Our business suffered greatly in the fire of 2012. We lost our home, barn, all camping equipment, and forage. We lost a horse due to fire and have lost one each year but are unable to determine why - no signs, Not malnutrition.

Our employees are usually high school and college kids still in school. We have hired J-1 visa kids in the past, and will again next year. It's very hard to find employees locally for either restaurant or hotel industry. Young adults are pretty centered in their electronic world, without a clue about economics for themselves.

Our hunting is actually better as our land was not damaged severely by the fires and more game came to us.

Our team consists of 3 management staff with higher education from out-of-state universities. We also hire several seasonal staff members each season, about half of which are recent college graduates looking for a temporary "lifestyle" position at a fishing lodge, filling positions such as front-of-house & housekeeping. The other half are seasonal local employees with high school diplomas.

Our workforce matured this year, with three new hires that are age 50 or older. Historically those positions have been held by those at the beginning of their careers (i.e. in their 20s). We are seeing more applications from out-of-area due to the changing marketplace for employment advertising.

Outlook is good expansion. Could use government assistance.

Please get those fires out quickly. Truly hard on tourism.

Please support clean energy, it will help with the fires that area symptom of a much larger problem.

promote Billings more for tourism not just conferences/conventions need to look at the smaller hotels and help them more, seems all the promotions are for larger hotels and forget about the everyday not chain hotels

Rural Montana needs to be touted as a place to go to avoid the crowded National Parks. Promoting the wild outdoor recreational areas and opportunities with the chance to avoid crowds and traffic congestion will benefit both the busy areas and the rural ones. Consider the lines of brake lights driving into Glacier this past year and imagine if even 10% of those wanted a different experience.

Sad to think that fire/smoke is "when" not "if" it could happen here topic. While most of our positions don't require higher education, the room for advancement within the organization is great. Overcome perception of low-wage entry level tourism jobs.

Since the forest service quit managing the forest we will continue to see bad wildfires since the dead and dying timber is everywhere now.

Smoke reduces our August revenue every year. Controlling Wild fires need to be a priority for summer tourism programs.

Survey notes: 1. Q2 - a non-profit does not have an "owner". Everyone working for a non-profit is an "employee" 2. J-1 visa changes: I am not aware that there have been any changes to the J-1 visa program. There has been much discussion in Montana and nationally about "anticipated" changes in the program and many of us in and associated with the tourism industry have conducted research on businesses and level of use of J-1 visas in our market. Thanks for work. I look forward to the results at the 2018 Outlook.

The Bureau of Rec's management (or mismanagement in this case) of the Bighorn River has severely impacted the quality of fishing and has is reducing tourism in the area. In the past, river flows were consistently regulated, which made the Bighorn into one of the top tailwater fly fisheries in the world. That reputation is suffering. For the past few years, flows have been either severely high (damaging the river bottom and riparian areas, as well as impacting the fishing tourists ability to wade and cast) or flows have been severely low (harming the fish and habitat). This new management style appears to be a knee-jerk reaction to snowpack predictions. When the snowpack appears high, the Bureau floods the river. When the snowpack doesn't meet predictions, the Bureau cuts the river flow to a trickle. Their defense of this "management by crisis" method is that snowpack is impossible to predict and they are doing the best they can. We try to be sympathetic, but our livelihoods are taking a big hit and the river is suffering. Once described as gin-clear, the Bighorn River this year was muddy, mossy and severely discolored due to disturbed river bottom and riparian areas. If snowpack is impossible to predict, how did Bureau managers in the past get it so right for so long...? And why are current managers having such a difficult time of it? The Bighorn has for decades been known as the most consistent and predictably excellent fishery in the West. That's no longer true. As local outfitters on the Bighorn River, we hear first-hand the grumbles and disappointment of the fly fishing tourists. We expect tourism to keep falling on this river due to government mismanagement.

The fires this summer were devastating to business, I am glad you asked and are gathering information about this.

The fires/smoke this year were absolutely horrible. Due to wildfires in BC, Canada, we had smoke filling the valley and area near us beginning in early July, which then continued through the later part of September, due to local fires.

The majority of the attendees at the conference were State and Local govt ...

<p>The one thing I noticed was a lack of international guests to our farmstay. The only international travelers we had were those already living in the US for work or school. The previous 6 years combined, we have had guests from over 23 countries.</p>
<p>The smoke caused us to lose a few reservations.</p>
<p>The tribal gill netting of Flathead lake makes it harder to charter fish each year. The state charging out of state licenses for fishing increased too much. They are not buying licenses. This will hurt FWP also.</p>
<p>Two years ago, we could not find housekeepers. That situation has improved, perhaps partially because we are offering pay at \$14/hour. The restaurant has had a terrible time finding workers, especially for the kitchen.</p>
<p>Unfortunate</p>
<p>We are a Visitors Center and so many of the questions are difficult to answer</p>
<p>We are such a small business that many of the survey questions don't apply to us.</p>
<p>We are such a small community it is difficult to find trustworthy and knowledgeable experienced people The fire crew in the area has no real impact on a positive or negative note other than the low government rate for hotels and they don't shop. We have no real industry here so it is difficult to keep people year round full time for employment for off season times.</p>
<p>We guide/outfit anglers near Glacier, and we got quite a few customers due to uncomfortable hiking conditions in Glacier due to smoke, and other closures in the park. Also, all our guides are independent contractors with very little turnover. Education is the least of the qualifications we would consider when contracting with a guide. The NUMBER ONE thing that impacted my business this year was the FIFTEEN DOLLAR "AIS FEE" that was added to a nonresident license. We lost many trips due to a family of four having to spend \$200 for a license to fish for 5 hours. If you want to increase tourism dollars through FISHING, then Guides and Outfitters should be able to take non-residents fishing in Montana under their Outfitter license. Requiring people to buy a license to fish with a guide for 4-8 hours adds an incredible cost to an already expensive activity. If they will fish independent of a guide then yes, a license should be required, but waive the license in the future for folks fishing with a licensed Outfitter/Guide.</p>
<p>We had a lot of issues with cancelation requests and were not available to accommodate due to our short season. People were very angry and we received a lot of negative reviews that will continue to hurt our small business because we were financially unable to allow every request we had as it was around 80% of our late august and September reservations.</p>
<p>We have to keep preparing for fires/smoke as an industry with good planning and communication. Training and retaining employees in hospitality is imperative to our little town as visitation increases and employee pool decreases.</p>
<p>We hired one more full time employee who will work with us through the winter. Ethically we felt that we could not fire the extra (visitation was down so much that they weren't very busy) bartenders even though our business suffered through the fire season. Ultimately we chose to keep them on as we are a small, family-owned business who cares about their employees. We hope to have a great season next year :-).</p>
<p>We lost business due to hurricanes, not fires. People from Texas lost their home, couldn't go on vacation.</p>
<p>We need a new program like Colorado State's master's program in Tourism Management.</p>

We use college students for the busy Summer, I wish I could interest them to be full time employees. They all want better more interesting work that pays more and has room for advancement. Do I have a Motel for you!! Be your own boss, meet interesting people and make money eventually.

We're thankful for the added business due to the wildfires, however hope we don't have to deal with the smoke & fire threats of this year. We are not aware of potential customers who changed their vacation plans because of wildfires, however look forward to a more normal and prosperous tourist season next summer.

Why is campground or RV park not listed as an option? We contributed \$215,000 to the Montana Bed Tax from our two Campgrounds in West Yellowstone this year which I would wonder where that ranks us as a contributor. Yet you folks don't acknowledge us as a tourism business. I would like an explanation please.

Wish there was a way to deal with the fires and prevent them, but it is out of my control.

Year was solid until Fires and smoke in September hit. Occupancy dropped drastically from that point on.

Your employments questions are difficult to answer because we hire primarily through the Workamper Program which is primarily retired and semi-retired individuals and couples.