Tourism-Related Business Owners Speak Out About COVID-19 Impacts

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Abstract

The coronavirus (COVID-19) pandemic has been sweeping the globe for the past few months, leading to worldwide travel restrictions, including a shelter in place order and closure of non-essential businesses in Montana. The Institute for Tourism and Recreation Research (ITRR) at the University of Montana emailed a survey to tourism-related business owners around Montana. Two separate rounds of the COVID-19 business survey were emailed during March. The purpose of this report was to analyze and synthesize open ended responses written by tourism-related business owners and managers on a COVID-19 survey as it pertains to Montana, and is based on comments from the second round of surveys representing a sample of 919 Montana tourism-related business owners/managers.
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Introduction

The coronavirus (COVID-19) pandemic has been sweeping the globe for the past few months. As of April 18th, 2020, the outbreak, which manifests in a mild to severe respiratory illness, has infected more than 2.31 million people and killed at least 158,000 worldwide (Johns Hopkins University, 2020). This number is expected to continue to rise, especially in the United States where a projected 100,000 to 240,000 Americans could die (NY Times, 2020). As of this writing, there have been 694,296 confirmed cases and 31,456 deaths in the United States (Johns Hopkins University, 2020).

This novel new disease, which began in the Hubei Province of China, is spread easily from human to human with positive test results confirmed in 210 countries. Due to its extremely contagious nature, the Trump administration has advised social distancing practices and following coronavirus guidelines until April 30th, 2020 (NBC, 2020). These restrictions have been integral for slowing the spread of COVID-19, but the economy has been hard hit. As of April 11th, 2020, 22 million people have submitted unemployment claims (Long, 2020) with a projected 47 million jobs lost (CNBC, 2020).

In Montana, there were 426 confirmed cases and 10 deaths as of April 18, 2020. In response to COVID-19, Governor Steve Bullock of Montana mandated a shelter in place order in addition to closing non-essential businesses effective through April 24th. In addition, Governor Bullock ordered anyone entering the state of Montana to self-quarantine for fourteen days. Travel from other states and countries has been the most common source of COVID-19 infections in Montana (MTPR, 2020). Both Yellowstone National Park and Glacier National Park closed the last week of March to prevent crowds and further spread of the virus (USA Today, 2020). Montana’s economy has also been affected by COVID-19 closures, and the upcoming tourist season is projected to be impacted for Montana’s outdoor tourism industry. The U.S. Travel Association is predicting a 78% drop in revenue over the next two months and overall losses of $400 billion. These travel losses far exceed any other sector of the economy (Oxford Economics, 2020). This could be devastating for Montana; whose economy is dependent on out-of-state tourist spending. In 2019, the estimated total contribution of nonresident spending to Montana’s economy was $5.09 billion (ITRR, 2020).

Purpose

The purpose of this report was to analyze and synthesize open ended responses written by tourism-related business owners and managers on a COVID-19 survey as it pertains to Montana.

Methods

The Institute for Tourism and Recreation Research (ITRR) at the University of Montana emailed a survey to tourism-related business owners around Montana as well as to Montana business owners who are members of associations, chambers of commerce, and convention and visitor bureaus. Two separate rounds of the COVID-19 business survey were emailed. The first one captured data from March 11th through March 13th. The second survey captured data from March 25th through March 27th. This report is based on comments from the second round of surveys and represents a sample of 919 Montana
tourism-related business owners/managers. Of the 919 respondents to the quantitative portion of the survey, 305 respondents provided comments in the open-ended question for a 33% response to the comment section.

The full survey received responses from all but six Montana counties: Blaine, Judith Basin Liberty, Petroleum, Treasure, and Wheatland. The comment section of the survey for this report represents respondents from 41 of the 56 counties. In addition to the above-named counties, business people from the following counties did not include any comments for this analysis: Broadwater, Chouteau; Fallon, Golden Valley, McCone, Powder River, Rosebud, Sanders, and Sheridan.

The data was analyzed using the qualitative data analysis software program, NVivo, and is presented as a descriptive analysis, finding themes that emerged from the data.

For results from the quantitative portion of the business survey, go to: https://bit.ly/39zEFVT.

Results

Before reporting results, it should be noted that findings of the first survey showed 72% of business owners felt the pandemic would negatively impact their business (ITRR, 2020) and 36% of these travel-related business owners had experienced cancellations to their businesses before there were even any confirmed COVID-19 cases in Montana. Cancellations grew in the second round of surveys to 84% of tourism-related businesses due to COVID-19. This large change in less than two weeks illustrates the severity of the situation.

Results for this report are reported by the respondents’ primary business association to the tourism industry and were categorized into four types: accommodations (N=236), outfitters/guides (N=216); tourism services (N=239), and tourism support services (N=228).

Accommodations

The highest number of respondents in this survey were from the category “Accommodations”, which consists of hotel/motel, bed & breakfast, rental homes/cabins/condos, campgrounds, and guest ranches (see Appendix A for all accommodation responses). Eighty-nine of the 236 respondents in that category left an open-ended comment. The comments were categorized or coded according to themes identified in the comments. Some comments contained multiple themes and were coded multiple times, thus the following percentages will not equal 100. Six themes emerged. The themes and their percent coverage in the comments were: cancelled reservations (37%), economic decline (28%), uncertain future (17%), changing business practices (9%), laying off employees (8%), and hopeful (3%).

Accommodations Theme 1: Cancelled reservations
The largest overarching theme in the “Accommodations” sector was cancelled reservations. Business owners expressed concern about current cancellations along with future ones:

“Currently all of my May bookings have been canceled! If we don’t have a 2020 season, I’m not sure our business and ranch will survive! I don’t know how we will pay our bank payments. I’m
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concerned for our future after my family has worked so hard to keep this ranch in our family for so long!”

“We have three hotels in Montana - Bozeman, Helena and Missoula. All groups and future business cancelled beginning on 3-12-20. We have furloughed all but necessary staff to remain open. We have closed all non-essential services - pool/spa, fitness center, daily housekeeping, breakfast.”

“We saw cancellations in March, but mostly offset by transient pickup. In April, its straight losses. Without the weekend events in May, we expect to lose more ground there. We will lose another 90 of our May rooms this week as Spartan race cancellations continue.”

**Accommodations Theme 2: Economic decline**

Often, concerns about cancellations were accompanied by fear of economic decline, which was the second largest identified theme shown in the following quotes:

“If I continue to get cancellations, I will have to claim bankruptcy.”

“I have gone from NO Cancellations Allowed, to fully refunding due to coronavirus. If we lose half or more of these guests, it will be devastating to income.”

“I am scared. It's still winter with big bills and little income. I won't have the $ to get halfway through April.”

**Accommodations Theme 3: Uncertain future**

Uncertainty about the future was present in many of the comments, with business owners feeling powerless about their future circumstances. Some business owners expressed anxiety about how they would continue to pay their employees, and some have already had to let go their employees.

“It is like fighting a war with an enemy that is invisible.”

“I open for the season May 1st same every year. If Yellowstone Park is closed, I know from the experience we had when the park was closed because of the government shut down a few years ago, that we will have absolutely NO Business. Every question I have received from my customers is about if the park will be open.”

**Accommodations Theme 4: Changing business practices**

“We are a family owned and operated business so we would not have to have our 2 employees and could run the place by ourselves and reduce lodging costs. We don't want to but will do what we have to do to survive. We had planned on updating our rooms but that is not going to happen.”
"We have held off on hiring summer employees, and probably won't hire any extra help this year."

**Accommodations Theme 5: Laying off employees**

"Had to close and let my employees go. Put our property up for sale yesterday on MLS in order to try and find a buyer as soon as possible."

"We went from having 47 employees to just 9 in just a matter of days. Salaried managers are working front desk and housekeeping shifts. Last year in March we ran the hotel at 92% occupancy and we looking to finish the month at 90% occupancy this year prior to our county shutdown. We are now going to finish March at 52%. April was looking to be 83% occupancy and now we are forecasting just 8% occupancy for the month."

**Accommodations Theme 6: Hopeful**

Some business owners still feel hopeful about the future summer season and feel that Montana may be an attractive place to visit because of its open spaces and low population.

"I am optimistic that it is early enough in the season that the COVID 19 curve will have flattened enough that people will resume more normal lives. One reason people flock to our state is the beauty and opportunity to 'get away from it all' and enjoy the outdoors where they can have natural social distancing."

"I believe that we have the type of outdoor rural experience that can provide excellent therapy for the American people when this is over."

The following is a word cloud generated from the comments of business owners from the “Accommodations” sector. The larger the word, the more frequently it was used in the comments. The most common word identified was “cancelled.” This aligns with the most common theme, which was cancelled reservations. Surrounding the word cancelled, other keywords include “closing”, “bookings”, “employees” and “summer,” which also echo common themes and concerns expressed in their comments.
Tourism services was the next largest open-ended respondent group, with 85 out of the 239 total respondents in that category writing in comments (see Appendix B for all tourism services responses). Tourism services are business that cater directly to tourists and include bars/restaurants, brewery/distillery, convenience store/gas station, auto repair, other transportation services (except airports), specialty retail, general retail, vehicle rental, casino, museum/interpretative center, ski resort, artist/crafter (made in MT). The five themes that emerged and the percent of respondents in each theme were: economic concerns (57%), concerns about future business (18%), laying off or reducing hours of employees (13%), losing customers (13%), and taking care of employees (6%).

Tourism Services Theme 1: Economic concerns
“Economic Concerns” was the predominant theme that arose in the tourism services sector. Many of these economic concerns arise from the upcoming tourist season, which so many depend on for a significant part of their income.

“Those in tourist related stores, wholesale, crafters make 80% of annual income between March and September, thus will impact the entire year. I expect to lose up to 80% of annual income.”

“This has hurt our business and our way of life for our own family as well as our employees. Not sure how we will dig our way out with not having our doors open to survive.”

“Sales have plummeted and if the financial conditions don't change, I may be forced to close my business.”
Tourism Services Theme 2: Future business concerns
This theme is related to their concerns about future business and the lack of reservations made for this summer:

“I'm in the rental ATVs, side by sides, paddleboards, and RV's. My phone has stopped ringing period. I go days on end with no calls. I'm coming off winter which my company counts on bookings for summer. Without this starting, in April I will be delinquent on all my bills including bank loans for my equipment. I may have to file, bankruptcy if I can't weather this storm.”

“This has not affected my business as we will not start operations until late May. But if things don't change and we still have this issue, I'm sure we will see significant losses to our business.”

“We were scheduled to open April 1. Opening is now postponed. A major capital project was set to begin. That has now been delayed. We anticipate several more school cancellations which are our major income maker in April and May. Hours will most likely be reduced once open as the budget may not allow us to fully staff.”

Tourism Services Theme 3: Employee lay-offs or reduction in hours
Similar to those in the accommodations sector, many business owners were concerned about having to lay off employees.

“We employ 10 employees that are forced to have their hours reduced to 1/2 of what they were working and are not making any tips and our daily income has been reduced by 2/3.”

“We have had to shut down temporarily and lay off all of our employees due to public and government policies and protections. We have lost half of our revenue for the month of March. We were slated to do 20% more business than March last year, so this is a huge blow. We have had few calls for future reservations. The majority of people have cancelled reservations or we have had to cancel their reservations due to public policy. No new reservations have been made due to Covid 19 uncertainty in our community and in our country. We are staying afloat but the future of our business looks bleak.”

Tourism Services Theme 4: Losing customers
Although it ties into concerns about future business, many small business owners were specifically worried about losing customers. One noted:

“Everyone has cancelled their orders. The phones are almost completely silent.”

“We have had to cancel fundraisers which is a huge part of our funding. If no visitors are stopping then no visitors are helping us stay afloat.”
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Tourism Services Theme 5: Taking care of employees

Some employers mentioned feeling a responsibility to their employees, and the desire to keep taking care of them.

“We are paying all of our employee’s normal wages for the next 3+ weeks we will be closed for sure (thru 4/19). We will probably have to rely on the State & Fed contributions to unemployment after that.”

“Our business revenues do not warrant us staying open i.e. our net revenue is negative. We will stay open as long as we can in order to help our employees as much as we can.”

The following word cloud displays the most common words that arose from comments in the tourism services sector. The most common word was “close”, displaying concerns about having to close business either temporarily or permanently. Other common words were “due”—many small business owners expressed concerns about paying bills that are due. One common word noted was “employees” which displays the concern many small business owners have about the responsibly they have towards their employees or having to lay them off. “Summer” was another common word, with concern about summer business, or in some cases, hope that summer will help their business recover.

![Word Cloud Image]

Figure 2- Data from World Frequency Count of “Tourism Services” respondents

Outfitter/Guides

The outfitter/guide sector had 67 open-ended responses out of the 115 respondents (see Appendix C for all outfitter/guide responses). This category consists of outfitters who hire the guides and guides who are either independent or contracted by outfitters. The five themes that emerged and the percent coverage in the comments were loss of business (48%), economic loss (42%), future
economic uncertainty (19%), dependence on short summer season (13%), and issues understanding how government assistance will help them i.e. unemployment or small business loans (13%).

**Outfitter/Guide Theme 1: Loss of business**
Loss of business was the most common theme that emerged from the comments. This is the time of year when guiding business are typically getting most of their reservations, and many business owners commented on the complete lack of business.

“March-May is usually the peak of our reservations, that has been reduced to zero with the virus as well as our income. Zero!”

“People are afraid to travel right now. It’s going to destroy the guiding industries for Montana. It will probably cause many outfitters to lose everything. If people won’t travel or cannot travel then there’s no work to be had.”

“I am sure I have underreported my cancellations. Since I am confident that May will go to zero completed trips and probably June as well. They are two of my biggest months usually.”

**Outfitter/Guide Theme 2: Economic loss**
This theme paired with loss of business for their own business and their employees.

“Our business has been devastated by this situation, and we have already had to lay off 60% of our employees. We handle thousands of trips a year, and in the past four weeks, we have processed and dealt with literally hundreds of cancellations.”

“Covid-19 has completely crippled the outfitting business. As a community, outfitters/guides are dealing with almost 100% cancellations this last few weeks and looking to repeat this in the following months to come.”

“If mandatory shutdowns continue any further, I’m not going to be able to stay in business.”

**Outfitter/Guide Theme 3: Future economic uncertainty**
Future economic uncertainty was also a common theme where business owners really don’t know what to think about their future:

“I have lost virtually all of my work for April and May, which would normally be about 1/4 of my income.”

“As a guide I am dependent on outfitters for work, when there are no bookings there is no work.”

**Outfitter/Guide Theme 4: Short summer season**
Because of the short season for many in the guiding industry, the small window to make their yearly income is a serious problem.
“As a guide, the coming months will dictate my yearly income. These early months may not have much influence into it, but if this continues into June it will impact myself and other guides negatively on whether or not we'll have enough savings to get through the winter.”

“As outfitters we have a very short window to make a living for the entire year. This virus has affected my business drastically. Not only with cancellations, but more importantly with future bookings.”

**Outfitter/Guide Theme 5: Government assistance**
A theme identified in this sector that was not present in other business categories was confusion as to how unemployment will work for independent contractors such as fishing guides, who may have a difficult time filing for unemployment.

“I am a fishing guide with two girls ages 4 and 7. Really worried about my summer and how I am going to keep a roof over their head. If I lose all my business because of Covid-19 this will get dire, we, independent contractors, as I understand it have no protection like unemployment insurance if we have no work!”

“All fly-fishing guides have been extremely hard hit by this crisis. As independent contractors, being able to apply for unemployment funds will literally change lives.”

The following word cloud displays the most common words used in the comments made by outfitter/guides. “Bookings” was one of the most common words, either concern about the lack of future, or “cancellations” of current bookings, which was another frequently used word. “Season” and “summer” were both common words as well, picking up on the anxiety that many guides have about their short summer season to produce enough income for the rest of the year.

![Word Cloud Image](image_url)

*Figure 3- Data from Word Frequency Count of “Outfitter/Guide Respondents”*
Tourism Support Services
The final respondent category was “Tourism Support Services” which includes sectors like land management, rental management, tourism promotion/advertising agency, event coordinator/manager, finance/accounting, and association director/chamber/CVB. There was a total of 228 respondents in this category, and 65 provided a comment (see Appendix D for all tourism support services responses). Four themes emerged. The themes and their percent coverage were economic loss (51%), public safety/safety of community (17%), concern about the future of tourism (14%), and hopeful (6%).

Tourism Support Services Theme 1: Economic Loss
Economic loss was the largest theme in tourism support services, with many business owners concerned about their finances.

“March and April are our normal order fulfillment months for that business but having spent the money to produce the product all the orders have been cancelled. We are in deep trouble.”

“I was laid off from my secondary job, which was travel and recreation-related.”


Tourism Support Services Theme 2: Public safety/safety of community
A theme that emerged in this sector that was not present in others was public safety/safety of community. These comments ranged from health concerns about COVID-19 to expressing the willingness to comply to help stop the disease from spreading.

“As an operator of a non-profit agency operating a movie theater, closing is important in reducing exposure and lowering the curve. A life is more important that profit is the bottom line.”

“Tourism and recreation are important to our state, but this is the time for everything to shut down and everyone to stay home.”

“If Montana does not stop tourism or practice social distancing, Montana will have a disaster like Wuhan, Italy, Washington, or New York.”

Theme 3: Future of tourism
Despite many concerns about the health of their community, many tourism service operators were also worried about the future of tourism in their community and the negative impacts from the pandemic:

“The impact on our local community is going to be staggering. Estimate 90-95% of the local economy is tied to tourism and hospitality, as a financial institution we will be very busy assisting customers in a time of financial distress.”
“Employment changes will impact our members and community, possibly for some time to come. The Park closure and delayed opening and hiring for the summer season will also impact our members. These actions are similar to what we took last year during the government shutdown.”

Theme 4: Hopeful
Some business owners are still feeling hopeful about the summer tourist season and feel that Montana may be an attractive place to travel:

“I simply hope the wide-open spaces so prevalent in Montana will be a key to getting people to our state.”

“I'm just thankful I run a young lean business. Low overhead, and no employees yet. It may be hard, but as long as I don't quit I will bounce back. My thoughts go out to the many who aren't as fortunate.”

The following word cloud displays the most common words from the tourism services sector. Like some of the other sectors, “cancelled” is a word that came up frequently in the comments. “Events” was another common word, in terms of concerns about having to cancel them or events already being cancelled. “Summer” and “tourism” were also common words, with either concern about the summer tourist season, or hope that it may help businesses.

![Word Cloud](image)

Figure 4- Data from Word Count Frequency of “Tourism Support Services”
Summary and Conclusions

Shared themes that arose from all sectors of the tourism industry were economic concerns due to lack of current or future business. Many business owners in the hospitality and guiding industry are currently experiencing a sharp decrease in business due to cancellations of bookings or lack of bookings for the future. Those in tourism services and tourism support services are experiencing complete lack of business due to their establishment being closed because of federal and state regulations.

In this uncertain time, the tourism industry is in an extremely vulnerable position. Small businesses are especially vulnerable, often surviving on a short summer season to generate revenue for the rest of the year. “Our businesses in the tourism field are small in Montana. That type of business does not have the ability of being able to survive any length of time without laying off people or closing their doors” (KPAX, 2020). Amongst the fearful comments, many comments were hopeful that a partial summer season would at least keep their business afloat, although it’s too early to predict if that will be possible.

Even when faced with challenges, community resiliency and human kindness is evident. This final comment is from an outfitter/guide who is struggling to keep their business afloat, but still finds the compassion to wish others well: “Honestly, I’m just trying to figure out what credit card to use to buy my non-essential items.... I’m struggling to meet the demands of my business, as an independent contractor, with the same uncertainty as everyone else, but not sure if I will literally be able to survive through this. Scary times. Whoever is reading this, stay safe and I hope the best for all of us.”

References/Citations


McCombs, Brady. “National Parks in Montana, Utah Join Growing List of Closures to Prevent Coronavirus Spread.” USA Today, Gannett Satellite Information Network, 30 Mar. 2020,
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### Appendix A: Comments by Accommodation Owners/Managers

**Accommodations: Hotel/motel; bed & breakfast; rental homes/cabins/condos; campgrounds; guest ranches**

<table>
<thead>
<tr>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>99% of our guests come from locations requiring them to fly to Missoula, or another airport, and then drive out to our location. Much of our season is May through October, at this time all of our guests (except the ones in April) have chosen to wait and see how things unfold in the airline and travel industry.</td>
</tr>
<tr>
<td>As a small business, loan funding is not necessarily helpful when we have no income. In multiple weeks, we have 1 total room, instead of 500. We have used available capital to pay our employees for numerous weeks with no business. Next we will have to lay off all staff. July will be our tax deadline, but our resources have been depleted.</td>
</tr>
<tr>
<td>Because we are only 4 miles from the NE Entrance to Yellowstone National Park, I feel that quite a few people are still waiting to see how the COVID-19 pandemic will play out before cancelling or modifying their existing reservations.</td>
</tr>
<tr>
<td>Closure of the ski mountain, restaurants, and other activities has crippled the rental business.</td>
</tr>
<tr>
<td>Complete evaporation.</td>
</tr>
<tr>
<td>Due to the business we run...an RV &amp; campground, the guests are self-contained and sufficient other than some use our bathroom facilities and guest laundry so we are amping up our sanitation protocol to help lessen the spread of any virus.</td>
</tr>
<tr>
<td>Even though we didn't we have many cancellations, our numbers are down because no one is traveling.</td>
</tr>
<tr>
<td>Glacier National Park is fundamental to my business, without it open, I will not be able to operate. If it keeps other businesses in my area from opening (restaurants, tour companies, stores, and other hotels/motels) I will also be unable to operate this season.</td>
</tr>
<tr>
<td>I am concerned, as an outfitter, about the regulations that authorize my license, for instance, I am required to carry insurance to keep my outfitters license active, the insurance is extremely expensive, what if we are not able to operate the summer season and I can't afford the insurance, will I lose my license? I am hoping that state agencies will work with us to allow some leniency in regulations in light of these unforeseen and trying circumstances.</td>
</tr>
<tr>
<td>I am expecting cancellations and requests for 100% refund for this summer.</td>
</tr>
<tr>
<td>I believe that we have the type of outdoor rural experience that can provide excellent therapy for the American people when this is over.</td>
</tr>
<tr>
<td>I believe the state and feds need to do more to help the small business owners who do not have employees! Owners get none of the things talked about! No sick leave, no unemployment. How about something for them??</td>
</tr>
<tr>
<td>I feel we're in a tough position - most of our customers are from out of state and if we try to continue to do business, we run the risk of allowing people from higher risk areas into MT. This creates antagonistic and negative feelings towards the industry from residents and puts staff at risk. If we don't try to keep a little business going and/or anger clients by postponing trips, we could potentially lose the business or seriously affect sales for the following year.</td>
</tr>
<tr>
<td>I generally have no bookings in March or April.</td>
</tr>
<tr>
<td>I have a vacation rental business. I am about $30,000 down from my normal reservations.</td>
</tr>
</tbody>
</table>
I manage a 60-room hotel. Our total cancellations since the beginning of March specifically due to the coronavirus total over 400 room nights and nearly sixty thousand dollars as of 3/24. These are reservations that were made that were cancelled. This does not include reservations we were supposed to get but haven’t gotten and probably won’t ever get. This is devastating.

I open for the season May 1st same every year. If Yellowstone Park is closed I know from the experience we had when the park was closed because of the Government shut down a few years ago, that we will have absolutely NO Business. Every question I have received from my customers is about if the Park will be open.

I own the ___ in West Yellowstone. It’s been in our family since 1953. We are in business from May 1st until September 30th each year. We make our entire living for the year during this time. Currently all of my May booking have been canceled! If we don’t have a 2020 season, I'm not sure our business and ranch will survive! I don’t know how we will pay our bank payments. I'm concerned for our future after my family has worked so hard to keep this ranch in our family for so long!

I run a vacation rental. Not open until May 1 canceled in May due to virus, several more are thinking they might. I don’t know if I’ll be able to get help with the extra cleaning it will require.

I would like for the prepaid Online Travel Agents to be more explicit in stating that reservations through them are prepaid and non-cancellable because they are booking with them. I’m happy to make cancellations and modifications that book through me but I did not appreciate that OTA’s are given the same flexibility while providing deep discounts that are supposed to be non-refundable even with the deep discounts.

If I continue to get cancellations, I will have to claim bankruptcy.

If it were not for the Canadians heading home the last 2 weeks, we would have had no business at all.

If this continues thru the summer I will not be able to make my payments

I'm a Guide, Lodge Owner, Fly Shop Owner, Real Estate Agent and General Contractor. So far from March through June we have 0 business in all businesses. Not Good!

In order to make payroll we are asking the bank to defer loans, we have stopped paying bills, and are charging any inventory.

Is there any way to get a business loan that can be forgiven if you have no employees? It's pretty hard to deal with cut backs when you already scrape by owning a business. Thanks for putting out a survey- much appreciated!

It has completely died

It is like fighting a war with an enemy that is invisible.

It is not the right now that is changing things. It is the uncertainty about the summer season. To speak to the question you did not ask: Seasonal hiring is currently set back or held off.

It is really too early to tell the true impact of this pandemic as it relates to summer reservations. I am optimistic that it is early enough in the season that the COVID 19 curve will have flattened enough that people will resume more normal lives. One reason people flock to our state is the beauty and opportunity to “get away from it all” and enjoy the outdoors where they can have natural social distancing. How they get here may be a major factor, however. If they planned to fly, they may re-think plans. If driving, maybe it won’t seem so bad.

It is still too early to tell the impact on our business that doesn’t take customers until June 7.

It will damage every business in town, West Yellowstone's businesses evolve around tourism.

It would be impossible for me to answer the number of cancellations we have had for March and the next few months. We have gone from an average of 80% occupied (for February and beginning March) to 35% occupied this week (and 3% occupied this weekend) with barely any reservations at all in April. We are working with mostly construction crews and a few businesses who are sending Montanan employees from other towns. These folks tend to book day of or only a few days in advance.
Like I stated above. We have only 4 bookings between now and June 1. We need 20 per week to break even. This is a big strain on our Motel. We only have 9 rooms but expenses are about $7000 per month whether anyone is here or not. Most of us small motels don’t have big pockets and will not make it through without getting loans to continue or fold up. Getting kind of scary on the Business side of things.

March and April are going to be financially horrible for us as a small B&B and we still have fixed expenses that have to be paid with no revenue coming in. Impossible for us to do social distancing in a historic home and keep ourselves, employees and guests safe. Had to close and let my employees go. Put our property up for sale yesterday on MLS in order to try and find a buyer as soon as possible. Working with bank but completely unable to access SBA disaster relief loans due to error/inability to access anyone or get into system.

Meeting and group events will cancel further out with the uncertainty. Scheduling speakers is hard when it is not known when things will get back to normal.

Most of our guests are return, and at this time they are just waiting to see what happens. We’re scheduled to open Mid May, and some want to come because they consider it a safe place, but are worried about airlines and ability to get to Montana.

My life, income, home mortgage, bills, and everything depends on the tourism industry. If they don’t come, I risk losing everything!

My motel is a motor inn, where a person enters from the outside and not through a common hall or lobby. My rates are very inexpensive and my marketing is in good shape. My cancellation policy is easy going, so that is not a problem. It will take a few months for the town to recover, however it will, some may go out of business though, as really this town is usually slow from Jan -May, and some businesses, who are newer, don’t get it. Time will tell for the next few months. I still have a few folks fishing and working, however that may change next month, as I have only 1 room booked! Lots of maintenance will get done for sure! I do have the RV park also and I have several in the park, which is unusual for this time of the year, however, they are workers and folks moving out of Washington and Nevada due to the virus.

My summer bookings have gone from one or two a day to nothing.

No other motels have closed their doors in Lewistown. I feel it is an important step as this is pretty much a retirement community and motels and gas stations are excellent businesses to spread the virus. But I am scared. It’s still winter with big bills and little income. I won't have the $ to get halfway through April.

No people passing through so no drop in nightly stays. May have to close the motel for good.

Our business hosts guests for 14 weeks of summer, but my husband and I have to operate the ranch year-round. If our guest season is shortened or canceled due to the virus, we will be unable to employ seasonal staff and greatly struggle to sustain our ranch until the next guest season in 2021.

Our industry is devastated and survival depends on how long this lasts.

Over the past 10 years, we gradually changed our marketing to Europe with great success and thought it would make us less vulnerable to economic ups and downs in the U.S. This year, we will modify this marketing plan to go back to marketing the U.S. Luckily, we still had our U.S. marketing information and contacts.

People will want to travel when they are able. All rural areas will be in demand. Will market to areas within driving range.

Please note our business was going to be closed from March 31st until April 17th. I will increase my marketing but hopefully will not have to decrease my prices but this is all uncharted territory and we will have to do what we have to do to pay our mortgage and survive. We are cancelling reservations from countries that cannot get here and holding to our 14 day cancellation for the summer. If we have non-refundable reservations that were made through booking.com we are adhering to their policy which is non-refundable for domestic reservations. We are a family owned and operated business so we would not have to have our 2 employees and could run the
Tourism-Related Business Owners Speak Out About COVID-19 Impacts

<table>
<thead>
<tr>
<th>Business Name</th>
<th>Impact Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lodge 1</td>
<td>Occupancy had dropped to an all-time low hovering around 10%. We are struggling to keep up with any expenses much less payroll.</td>
</tr>
<tr>
<td>RV Park 2</td>
<td>Relative to RV’s it is very evident at this point, our season is going to be negatively impacted if not completely decimated. MT RV parks make most of their income in three months of Summer.</td>
</tr>
<tr>
<td>Campground 3</td>
<td>The one reservation I received for the end of March is due to workers from Michigan coming to work on the new hotel being built in Livingston.</td>
</tr>
<tr>
<td>Hotel 4</td>
<td>The questions of &quot;how many cancellations&quot; are silly and show u dont' know what you're doing. Unless you know what's normal for pacing, you don't know what's normal for cancellations.</td>
</tr>
<tr>
<td>Business 5</td>
<td>The success and popularity of our rental businesses in Duck Lake, West Glacier and Whitefish have provided 90% of our income and our long-term investment strategy.</td>
</tr>
</tbody>
</table>

Please work with law makers and others to ensure that business interruption insurance will cover closures due to the corona virus that we are not allowed to open for our season. We rely on our guests for our income and if we are not allowed to open we will probably have to close our business permanently. We’ve been in business for 75 years and it would be devastating to us if we had to close. We get business interruption insurance for scenarios like this and currently insurance companies are denying any claims in regards to the virus. This shouldn’t be allowed. Please help us make the insurance companies hold up their end of the deal.

RV'ers are staying in rest areas / store parking lots instead of RV Park or Campgrounds. Passing up overnight stay that we rely on.

Screw Trump

Suggest legislative action to suspend collection of occupancy taxes. All tax burdens are negative impact to commerce and tourism restart. Follow the NPS initiative! Focus on FIT domestic audience with primary focus on drive markets immediately.

Our Lodge has been severely impacted by Covid-19. We had to completely layoff the restaurant staff and all the others are taking drastic reductions in hours. Occupancy had dropped to an all-time low hovering around 10%. We are struggling to keep up with any expenses much less payroll.

The lodging industry is carrying the burden of taxes in Montana, and has all but shut down. Spread the taxes across the tourism industry, or plan on making your lodging industry less competitive.

The one reservation I received for the end of March is due to workers from Michigan coming to work on the new hotel being built in Livingston. They are supposed to stay for a week. The reservation I have at the end of April is visitors coming to see Yellowstone. That may be a cancellation now that Yellowstone is closed, unless it reopens.

The only impact we had is less travelers.

The success and popularity of our rental businesses in Duck Lake, West Glacier and Whitefish have provided 90% of our income and our long-term investment strategy. Our goal was to use the income while the property increased over time. Now we are panicked that we need to sell the income property to get out from any debt.
The Coronavirus has taken all the income stream that we needed to run our own business. WE ARE FREAKING OUT! And don't know what to do...

The virus and slowdown of the economy and life will affect how people travel and who stops in our city. We are an event driven market so this cuts deeply. However we did catch some snowbirds on their way back to Canada early, which means it will be displaced revenue from April.

There is no business with the virus.

This has had a tremendous effect on our business!

This has hurt very badly and I fear we're only at the tip of the iceberg.

Tourism and recreation are a big part of our business. As a result, we're taking a major hit.

We are a fishing lodge on the Bighorn River. The Bighorn County Health Department has closed all lodges on the river. We are the ONLY river in the state under these restrictions. This is driving business away from us to other rivers resulting in a significant economic impact. This is inequality of restrictions is risking the survival of lodges, guides, and outfitters in what is a 5 million dollar industry in one of the poorest counties in Montana. We are asking that the Tourism Bureau look into this situation.

We are asking that if the RVer is self contained and our restrooms are not open why the Rver cannot stay in the campground over night? We would limit the number of nights to one or two nights at the most till things settle.

We are delaying bookings until Memorial weekend, but we are nervous about the pandemic stretching into the summer.

We are seasonal (May-October). We have 12 log chalets available for nightly rentals. We take half down as a deposit upon booking. Without any new reservations coming in, and the refunds for cancellations, we barely have our head above water. I do have an outstanding balance with the state in which I'm on a payment plan. They deferred my payment until next month (and possibly further) which helped greatly. Tough times for sure.

We are transitioning our rentals into long-term housing for friends and family that are being displaced by this pandemic. We are executing strict 14-day quarantine rules with the incoming individuals. We have lost most of our projected income, and we are trying to make the most out of the change while keeping our community safe.

We are trying to reassure current clients and staff for the upcoming summer season. Our season begins in June, so while we have not had to lay anyone off, we will not hire as many seasonal employees this year and will be cutting back on any extra expenses. We also lost 1 employee that was to begin in May as she was scared to travel. March is typically the month when we fill the holes in our season, but we are not getting the usual inquiries or bookings, so our season is definitely less than it has been for years.

We are very dependent on the Yellowstone National Park Schedule.

We do not open until May 1, will be able to tell definite effects by May 31

We do not open until May 1. We have seen a decline in the early part of the season. Cancelled/postponed all social gatherings in the park. Will keep office and all buildings closed to the public.

We have a cascade of cancellations for the coming summer and no money coming in to pay back deposits. If things don't change soon we'll go bankrupt and the top-rated hotel around Yellowstone will be gone.

We have had absolutely no reservations or inquiries for the peak season!

We have held off on hiring summer employees, and probably won't hire any extra help this year.

We have lost 75% of our "off interstate" business, AirBnB is down (90%), Expedia is down about the same

We have lost about over $2000.00 this month alone in income. This affects our ability to pay bills. The travel advisement to stay inside and not travel and having a town and area under shutdown has hurt us.
Tourism-Related Business Owners Speak Out About COVID-19 Impacts

<table>
<thead>
<tr>
<th>We have seen an uptick in domestic guests wanting to stay in Montana and a decrease in international guests wanting to stay here.</th>
</tr>
</thead>
<tbody>
<tr>
<td>We have three hotels in Montana - Bozeman, Helena and Missoula. All groups and future business cancelled beginning on 3-12-20. We have furloughed all but necessary staff to remain open. We have closed all non-essential services - pool/spa, fitness center, daily housekeeping, breakfast. Our system does not allow me to see what dates the cancellations have been without a cumbersome task of each cancellation. I can only see how many per day. Therefore the 310 is from 3-13-20 forward.</td>
</tr>
<tr>
<td>We have written a blog with references to the Coronavirus crisis and distributed it to our guests and any potential guests. We have received some very positive responses from guests that are currently booked for the 2020 summer season. Most have not cancelled yet but as this goes on that may change.</td>
</tr>
<tr>
<td>We just open the business for season, usually we have many phone calls for reservations. We have phone calls only for cancellations at this moment, no new reservations for future. And we have many guests from Canada, the border is closed now. Praying for this situation not too long...</td>
</tr>
<tr>
<td>We lost three different blocks of reservations due to corona virus restrictions. One was for a Moose convention, one was a school sports competition and one was an adult tennis/racquetball tournament.</td>
</tr>
<tr>
<td>We open for guests May 1, and made the decision to delay opening until June. Many guests were disappointed but understanding. We have had many inquire about transferring their booking into our September and October packages.</td>
</tr>
<tr>
<td>We saw cancellations in March, but mostly offset by transient pickup. In April, its straight losses. Without the weekend events in May, we expect to lose more ground there. We will lose another 90 May rooms this week as Spartan race cancellations continue. The Blind Refs Tournament is the next date on the calendar that looks like it could deliver demand. I hope a decision on that event can wait.</td>
</tr>
<tr>
<td>We went from having 47 employees to just 9 in just a matter of days. Salaried managers are working front desk and housekeeping shifts. Last year in March we ran the hotel at 92% occupancy and were looking to finish the month at 90% occupancy this year prior to our county shutdown. We are now going to finish March at 52%. April was looking to be 83% occupancy and now we are forecasting just 8% occupancy for the month.</td>
</tr>
<tr>
<td>We were almost fully booked for the summer season by January. Only one cancellation from Canada (border closed) so far. Most future guests are waiting until 30 to 60 days prior to their arrival to decide whether or not to cancel. I have gone from NO Cancellations Allowed, to fully refunding due to coronavirus. If we lose half or more of these guests, it will be devastating to income.</td>
</tr>
<tr>
<td>We won't know full effect until summer season is here and if Glacier Park is open. Our main season is June thru Sept.</td>
</tr>
<tr>
<td>Xanterra in Yellowstone. Decided to close until May 22. Some employees have been furloughed and employees that can work from home have been encouraged to do so.</td>
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Appendix B: Comments by Outfitters and Guides

<table>
<thead>
<tr>
<th>Outfitter/Guide</th>
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</thead>
<tbody>
<tr>
<td>All fly-fishing guides have been extremely hard hit by this crisis. As independent contractors, being able to apply for unemployment funds will literally change lives.</td>
</tr>
<tr>
<td>All is expected very quiet during my normal busy season- 22years</td>
</tr>
<tr>
<td>Tourism-Related Business Owners Speak Out About COVID-19 Impacts</td>
</tr>
<tr>
<td>-------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>As a fulltime fishing guide in Montana over the past decade I have absolutely strived to work as much as I possibly can. I’m sure it will come as no surprise that we all depend on our season to provide for our families to make it through the winter every year. I know I’m not alone in this regard. Thank you for taking the time to check on us. Any consideration is greatly appreciated at this time.</strong></td>
</tr>
<tr>
<td><strong>As a guide and not an outfitter I am not legally allowed to advertise or generate business of my own, despite being an independent contractor. This means my future business and income is reliant on the outfitters that sell trips and put me on the job. If people can’t travel here (including many of my return clients from years past) there is little to no market for my service, and nothing legally I can do to help myself within the guiding industry.</strong></td>
</tr>
<tr>
<td><strong>As a guide I am dependent on outfitters for work, when there are no bookings there is no work</strong></td>
</tr>
<tr>
<td><strong>As a guide, the coming months will dictate my yearly income. These early months may not have much influence into it, but if this continues into June it will impact myself and other guides negatively on whether or not we’ll have enough savings to get through the winter.</strong></td>
</tr>
<tr>
<td><strong>As an independent contractor/guide I unfortunately have little control over the ebb and flow beyond the clients that keep in touch with me directly. All of my cancellations have come through the outfitter having contact with particular clients. As things change daily, I am bracing for even more cancellations well into June. I guide on the Smith River as well, which is rumored to be closing for an extended amount of time, and will in turn take an extensive chunk out of my early season dates. There are estimates that the outfitting/guiding industry may take a 50% hit on business this season, which would be devastating to many of us. Options will be limited for employment either way if we are living in limbo for the next several months and government assistance, of some sort, would have to come into play for many of us.</strong></td>
</tr>
<tr>
<td><strong>As outfitters we have a very short window to make a living for the entire year. This virus has affected my business drastically. Not only with cancellations, but more importantly with future bookings</strong></td>
</tr>
<tr>
<td><strong>Bookings have slowed down, this will impact fall business because license applications of clients will be down.</strong></td>
</tr>
<tr>
<td><strong>Covid-19 has completely crippled the outfitting business. As a community, outfitters/guides are dealing with almost 100% cancellations this last few weeks and looking to repeat this in the following months to come.</strong></td>
</tr>
<tr>
<td><strong>Everything is changing so fast with this pandemic. The moves I tried to make are outdated a few days later. Doing the best we can.</strong></td>
</tr>
<tr>
<td><strong>Honestly, I’m just trying to figure out what credit card to use to buy my non-essential items, before midnight tomorrow. I’m struggling to meet the demands of my business, as an independent contractor, with the same uncertainty as everyone else, but not sure if I will literally be able to survive through this. Scary times. Whoever is reading this, stay safe and I hope the best for all of us.</strong></td>
</tr>
<tr>
<td><strong>I am a fishing guide with two girls ages 4 and 7. Really worried about my summer and how I am going to keep a roof over their head. If I lose all my business because of covid-19 this will get dire, we, independent contractors, as I understand it have no protection like unemployment insurance if we have no work!!</strong></td>
</tr>
<tr>
<td><strong>I am a guide service in Yellowstone, which is now closed. My cancellations have and would occur regardless of that closure. It would be irresponsible for me to operate because I cannot maintain appropriate social distance from my clients. Most travel from out of state and country. Coronavirus has decimated my business, hopefully for just the short term.</strong></td>
</tr>
<tr>
<td><strong>I am a self-employed fishing guide, out of work for the foreseeable future.</strong></td>
</tr>
<tr>
<td><strong>I am sure I have underreported my cancellations. Since I am confident that May will go to zero completed trips and probably June as well. They are two of my biggest months usually.</strong></td>
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</tbody>
</table>
I feel that when this media scare blitz subsides and they are back to the usual get rid of Trump, things will be back to normal Very quickly

I have lost bookings as well as retail business. My business' future depends on bookings and sales throughout the summer, which are not materializing. I also don't want to encourage folks to come here fishing while the spread of covid 19 exists.

I have lost virtually all of my work for April and May, which would normally be about 1/4 of my income.

I own a top-notch, educational guiding company in Gardiner, MT that bases 100% of my tours inside Yellowstone National Park. I have grave concerns that Covid-19 (coronavirus) will have long term effects on my small, family-run business. Not only are my booked tours cancelling now for scheduled dates in May - September, but calls are not coming in to fill open slots that we have for summer. As of this date, March 25th we have yet to see the full fallout of cancellations, as I believe more are eminent. When Yellowstone National Park re-opens and travel restrictions are lifted, I still will be guiding in a small vehicle with guests that arrived via plane and automobile from all over. I physically, cannot keep a 6-10' distance from my guests! I have concerns that if I continue my business this summer, I can potentially and unknowingly transfer the coronavirus to my 70-year-old neighbor and other community members! There are so many unknowns right now for small businesses that rely on travel and tourism. If Covid-19 comes back in the fall/early summer (as the Park County Health Dept representative anticipates), the unknown future travel bans/restrictions, etc., will no doubt play into our future bookings. This is serious and has long term effects.

I think all summer outfitters and businesses that depend on tourism activities should be preparing for a worst case scenario of a complete loss of summer business this summer. Best case we think is a 40-50% reduction in tourism expenditures.

I won’t know exactly how effected by this situation I am until May when I will find out if clients have cancelled their June trips.

I work as an independent contractor for Global Travel Alliance out of Bozeman, Montana as well as starting my own tour business in Yellowstone. I also work as an employee for Road Scholar out of Dillon, MT. In 2018/2019 I was an employee of In Our Nature Guiding Services out of Gardiner, MT. I now work in both capacities for different companies and have lost thousands of dollars already due to the virus. Anything that can be done to assist with this situation is so very much appreciated. Thank You.

I’m a small business owner w/o brick and mortar place of business. I am a fly-fishing outfitter. My business is dependent on number of days worked. Lost days are gone. They can’t be made up!

If mandatory shutdowns continue any further I’m not going to be able to stay in business.

It is too early to determine the impact for us. We are just not going to start operations until Fall.

It's is sad that guides do not receive unemployment and compensation and it is going to be a massive ripple effect from hotels, shops, restaurants, and fuel stations.

Like most fishing guides, I primarily operate June through September. These months' bookings have not yet been hugely effected by Corona but they most certainly will as we get closer to summer. No new bookings for this time period have been confirmed in the last 5 weeks. Also, I have a small rental in Livingston. Same here, no new bookings. Typically, these spring months (March/April) are key in filling up the summer with work. Because of this timing, even if the virus peels off, a depressed economy, uncertainty about the safety to travel and a decrease of vacation planning on the parts of families across the country will greatly change the course of most businesses related to tourism.

March-May is usually the peak of our reservations, that has been reduced to zero with the virus as well as our income. Zero!

My business will be closed until the pandemic is over due to lack of tourists.
Tourism-Related Business Owners Speak Out About COVID-19 Impacts

My outfitting and accommodations business does not really start until May. I anticipate May being very slow or almost nonexistent this year. I am cautiously optimistic that this will not cause me to have to shut my doors completely for the summer. I have had many high growth years in a row up to this point. I don't anticipate this being a great year but I'm hoping I will be able to make a small profit or at least not lose money. I have had to stop working on side projects in order to conserve money for the unknown future. My main concern is keeping my 12 full time employees employed, not going into unrecoverable debt and being able to hire on the majority of my 100+ person seasonal staff.

Not sure how I’m going to pay the bills.

Our booking season is 1Q. That has been decimated by the WuFlu quarantines/panic/travel bans/etc. Further, our "customer season" is June-Nov. Right now, we are anticipating 75% decrease in gross revenue for June-August, compared to last year. Our Sept-Nov season is holding steady at the moment, but risk is high that continued duration of the economic shut down will start to affect that season as well.

Our bookings before the virus hit were pretty good for our multi-day trips in July & August, so we are hopeful those trips will be able to happen and if the spread subsides and travel restrictions lifted, we will be able to do our Alberton Gorge trips. We anticipate a reduction in user days, but hopefully we can resume in July & August.

Our business hasn't been affected YET... this is typically our slow time so we won't begin to see the repercussions until Memorial day.

Our business is deer elk hunters in October/November so we have not had any questions or concerns from clients as yet. Our worldwide booking business for trips happening now into 3 months out is experiencing mostly postponed trips to later date this year or into 2021.

Our cancelation numbers entered here refer to groups which are 10 to 20 per group. Thus our loss of income is large.

Our company is a destination angling travel and booking company. We are based in Montana and employ 31 people on a full-time basis. While we do book trips in Montana and provide outfitting options throughout the state, we also send clients all over the world, booking more than 230 different lodges and outfitters in 28 different countries. Our business has been devastated by this situation, and we have already had to lay off 60% of our employees. We handle thousands of trips a year, and in the past four weeks, we have processed and dealt with literally hundreds of cancellations.

Our industry associations are providing resources and information updates to better prepare for the changes brought on by coronavirus, but most of us are already prepared for changes caused by fire, flooding, drought, etc. so we are flexible and highly adaptable and can modify our business model to accommodate needs of clients' and community.

People are afraid to travel right now. It’s going to destroy the guiding industries for Montana. It will probably cause many outfitters to lose everything. If people won’t travel or cannot travel then there’s no work to be had

Please help guided/ind contractors that have no aid.

Regarding tourism, we should probably not be promoting people to Montana at the moment. The outdoor recreation economy is not subsidized by the government and crisis like the one we are currently facing are an example of how we are all connected.

Single dad of 3 fly fishing guide....

Some businesses--who have thrown their cancellation policies out the window, and are refunding clients 100%--are operating on fear and shooting themselves (and others) in the foot. We are not responsible for this situation--why are recreation businesses footing the bill? When others offer full refunds, it undercuts those of us trying to offer credit, or other measures ensure the survival of our business. It's shameful.
<table>
<thead>
<tr>
<th>Suspend the license fee requirements for Board of Outfitters, USDA, and State lands.</th>
</tr>
</thead>
<tbody>
<tr>
<td>The 10% of the people that can afford to invest in the stock market will show up in Montana to Vacation. These people will ONLY show up to engage in major activities if they feel SAFE to TRAVEL. Blue collar people will still be picking up the PIECES of their LIFE. Many Small Businesses in Montana will FAIL before Labor Day this Year...</td>
</tr>
<tr>
<td>The coronavirus has had a devastating effect on my business for 2020. In March of 2019, we booked 21 tours for various dates in 2019. In March of 2020, we have only booked 1 tour and refunded money for 10 tours already on the books. The reduced bookings plus the negative cash flow will be extremely difficult to overcome.</td>
</tr>
<tr>
<td>The coronavirus hasn't affected my business at this point.</td>
</tr>
<tr>
<td>The virus will affect booking for hunting.</td>
</tr>
<tr>
<td>This most likely will put many outfitters out of business for the season and possibly forever!</td>
</tr>
<tr>
<td>Too early to tell how hunting season will be affected. Also, the market could impact our grazing lease if it tanks.</td>
</tr>
<tr>
<td>Uncertainty with air travel has been one of the primary factors in encouraging our clients to cancel their trips. Most people who come to Montana to fish, especially the Bozeman area, rely on air travel. The closing of Yellowstone National Park is also significant. Multi-family and large group trips have also cancelled due to the guidelines of not congregating in groups of 10 or more.</td>
</tr>
<tr>
<td>Unfortunately, I will lose tens of thousands of dollars due to cancellations this season. I'm currently struggling with the decision to take or not take clients that still want to go in April. Any possible income is hard to turn away. The most responsible thing to do I believe is to follow the Governors orders to hunker down. As of today I will most likely cancel the rest of my April bookings. The more we do now will hopefully get us back on the river sooner this summer.</td>
</tr>
<tr>
<td>Usually March would be slammed with new bookings. More than 2 or 3 solid booking a day and 10-12 plus phone calls. We have had one booking in 3 weeks.</td>
</tr>
<tr>
<td>We are a summer business. We have extended our balance due date and allowed for a more flexible cancellation policy to keep clients from canceling trips entirely. Won't know the full impact to summer business until things move forward</td>
</tr>
<tr>
<td>We are all in the tourism business and this is a serious disruption to our business. I would hate to be just starting out.</td>
</tr>
<tr>
<td>We have a strong repeat clientele, but it depends on them being able to get here and feeling good about the economy and family's health.</td>
</tr>
<tr>
<td>We have only a short window to make an income that carries us through the rest of the year. Due to the nature of guiding out of a boat, and having to transport clients, we cannot do that and still conform to the social distancing policies. I usually do 25 to 30 trips every spring before June 1st--a few trips in March, about 12 in April and about 12 to 15 in May. That does not include multiple boat trips where I hire an independent contractor, which is usually about 10 trips. I have done one trip and have 2 other trips booked before June 1st this year and there is a good chance, those trips will be canceled. I don't have a lot of cancelations as reflected by the survey however, people are just not booking trips before June. As for offering reduced pricing and/or increasing marketing efforts, I don't see the point in that if we are not able to perform our services. We cannot be open for business right now and nobody knows when we will be able to start taking trips. As for the nature of how we employ guides; we are all independent contractors. Sometimes I hire other independent contractors and sometimes others hire me. Because we don't actually employ folks, we will not qualify for much of the help that is being offered so making up revenue for this part of the season that we can't work doesn't seem likely.</td>
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Tourism-Related Business Owners Speak Out About COVID-19 Impacts

We modified our reservation deposits in early Feb, and hoped for short-term problems, but the length and necessary government restrictions is making it difficult to pay bills. Let alone hiring of seasonal employees.

We need more Covid testing to be done before this can be remedied. We need to think about our health before our business. I am not dying to go back to work if it means dying.

We need to rethink the whole why guiding is operated. See where we can improve safety and clean boats.

What started out to look like a great season has become a disaster. All the calls I have gotten this week has been to cancel except for one that is requesting information. The one requested information is not sure if he will be able to find a motel open in my area to come and fish with me.

Will need to infuse tens of thousands (if not $100K-$200K) of dollars personally to remain alive through this year. A county by county approach to shut down in efforts to keep tourists does nothing, there needs to be statewide regulations that all counties follow. If tourists can’t go to the Bighorn, they will just go to the upper Yellowstone and we are already seeing this. It just delays the inevitable as it relates to the virus and in the meantime costing those tourism businesses that must close more money in the process with no end in sight.

Over last 2 weeks our new reservation flow for 2020 bookings which was strong has completely dried up. We want to do what’s right, if that means closing that means closing, but frustrated it isn’t statewide given the ineffectiveness that policy will have to draw this problem and closures out indefinitely.

With cancellations and lack of booking during March on forward I do not know what my future holds with my guide business.

With Yellowstone and Grand Teton being closed, our market will significantly drop, depending on how long the parks are closed for. We are a family owned small business trying to pay all the mortgages, all the insurance, all the taxes and we haven’t even gotten to our season yet. We make all of our money for the whole year within 4 months of our season...this will significantly change the operation and success of our business.

Without flights and access to lodging my business cannot function accordingly. With every guest that has deposited funds in recent months and every new inquiry that will come in the future, it is imperative that these operations resume normal business practices before in turn my business can resume normal business practices. This has been detrimental to my business, one that relies on the spring and summer months entirely in order to make it through the long winters. I am nervous and uncertain for not making it through this summer and fall, but how this will compound into our bottom line and how a year from now I will be able to make ends meet through the following winter.

Appendix C: Comments by Tourism Services

Tourism Services: Restaurant/bar; brewery/distillery; convenience store/gas station; auto repair; other transportation services (not airports); specialty retail (souvenirs, gift shops, fishing, hunting, outdoor gear, etc.); general retail; vehicle rental; casino; museum/interpretive centers; ski resort; artist/crafter (made in MT)

After a terrible March in 2019 this years, March began up with a 300% increase over the past year. But with the virus our visitor numbers dropped to only 2 or 3 a day. We depend on traveling visitors for the income. With the social distancing, people are not leaving home except for essentials. This drop will severely impair the museum’s ability to operate. Our busy months are the support for this nonprofit.
Tourism-Related Business Owners Speak Out About COVID-19 Impacts

As a seasonal business, we would normally close around April 5th. We do have weddings that are still on the books at this time starting in June.

As a ski area we have canceled lift ticket reservations - we do not have any lodging.

As cancelations come by the hour I’m sure by the time you review this there will be more. In addition - tourism picks up in May so cancelations going much further out will be devastating to our business. Without dine in cafe and the Park being closed - if this goes on much longer will create long term struggles.

As of today 3/27/20, the only thing that has affected our shop is the calls inquiring about whether we are still open, and two employees decided to put themselves on quarantine. This has slightly slowed production time, but nothing else. In regards to the scheduling numbers, we don't usually schedule more than two weeks out, due to potential changes from supplements. Now, in the near future, we could feel a very real impact from the virus's societal reactions. Most major parts plants have shut down. We could be without parts in the near future, which will shut us down or at the very least stop production on a vast majority of jobs.

Athleta has closed for a minimum of 2 weeks. The store chose to close before Southgate Mall decided to close. Gap Inc was paying all employees for any scheduled shifts during the closure.

Because we’re unable to operate, as a Tasting Room, we’re looking to keep our workforce fully engaged, even if it means asking them to do other work, at least until we know what Congress passes for support in this current bill. If we can keep them employed and paid 100%, including benefits, to stay home, we may ask some of them to do that. Otherwise, we’re working on producing hand sanitizer for large scale contracts in and outside of Montana, continuing to generate some revenue to take care of our team and our overhead.

Being in the travel industry I anticipate that my business will continue its down turn until the quarantines are lifted and the virus subsides.

Due to Covid-19 our bookings are down, Walk in traffic is down.

Hopefully some mandates will force our business interruption insurance to cover this situation. Our walk-in traffic flow has completely stopped due to the situation.

I am a partner with one other person in a catering business who do our business as a sideline. We have lost various events to cater due to social distancing and via Gov Bullocks directives. We are not hurt financially due to this being a sideline, but we have had clients begging for our product but we have denied them due to the pandemic.

I am having a difficult time getting product in my store, due to problems my suppliers are having due to the virus. Shipping is slower, many needed items are out of stock, etc.

I am not able to deliver to half the places in our small community. I have had to reduce my hours or operation to keep the building and monthly costs down.

I expect when we open back up, we will be slow and then at some point have to close again when COVID-19 breaks out again. I don’t know that for sure, but feel it is likely.

I feel the tourism business might be the #1 culprit for spreading the disease but we are a vital part of the Montana economy. We need some economic relief or we will go out of business. I am also unsure how I can run my outfitting and lodging business safely during this pandemic.

I have been put on sick leave until something changes or it runs out.

I have had to close my business for the season completely and let all staff go as a ski rental equipment business. I have lost in excess of $+275,000.00 in revenue.

I rely on tourism for my income as self-employed I do not qualify for unemployment or any other services. I live and work in Virginia City and this will have a major impact on our town as we already struggle.
Tourism-Related Business Owners Speak Out About COVID-19 Impacts

<table>
<thead>
<tr>
<th>I run an outdoor adventure summer camp out of Missoula (MOLA). I am facing a huge amount of uncertainty. If the pandemic blows over soon, either nationally or just in Montana, we may be able to operate fairly close to normal. If things don’t get better, or if they get worse, we may have to shut down for the season. We could also end up trying to operate at a reduced capacity. I have already lined up 12 staff members for summer, and by the end of April, I’ll have to make a huge decision about what we’re going to do, possible telling people they no longer have a job for summer.</th>
</tr>
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<tbody>
<tr>
<td>I wish the tourism industry put a little more emphasis on things to do inside. I did see a little movement when the fires a few years ago took people from the outdoor recreational areas. I am not asking that our arts scene be primary, just that it be a little higher percentage of your focus. When something like this hits, you really don't understand the infrastructure of the visual arts, theatre, dance, literary scenes. And most of your focus of the arts is in music concerts and culinary arts...because of the clear monetary incentives. Yet there's so much more in our towns to build from. And if the tourist industry had infrastructure in this area, you’d be in a better position for outreach now.</td>
</tr>
<tr>
<td>I'm also a new (1 1/2 yr old) realtor who primarily works with out of state buyers. The out of state buyers have also stepped back from doing business.</td>
</tr>
<tr>
<td>I'm in the rental ATVs, side by sides, paddleboards, and RV’s. My phone has stopped ringing period. I go days on end with no calls. I'm coming off winter which my company counts on bookings for summer. Without this starting, in April I will be delinquent on all my bills including bank loans for my equipment. I may have to file, bankruptcy if I can't weather this storm.</td>
</tr>
<tr>
<td>I'm very concerned for my small restaurant and my employees as well as all the other businesses in our tiny town of Lincoln. We rely mostly on tourism and people traveling through town. Most of our employees rely on their tips as well as their paychecks and live paycheck to paycheck. We are being offered low interest loans but most of us can't afford to take out another loan regardless of the interest rate. For many of us it would be more beneficial to be able to defer my loan for a few months and tack that amount to the end of the loan.</td>
</tr>
<tr>
<td>It appears as though the mandated closure will cost our business close to $480,000 in gross sales if we can resume business in mid-April.</td>
</tr>
<tr>
<td>It has been tough and it's getting worse. People can only eat out so much when they're not working. Getting kind of nervous.</td>
</tr>
<tr>
<td>It has not really even hit the busy time of year with tourists, so I am worried about this summer when a lot of our customers are tourists if they decide not to travel due to the spread of the coronavirus.</td>
</tr>
<tr>
<td>It’s just so slow I’m not sure how I can afford to keep my business open. I do not qualify for a svs loan as I haven’t been in business for 1 year.</td>
</tr>
<tr>
<td>Need Yellowstone National Park to reopen hopefully by May 1. Everything pretty much hinges on that.</td>
</tr>
<tr>
<td>No traffic from Canada.</td>
</tr>
<tr>
<td>Our business does rely on tourism and travel to a large extent. Many are Canadians and they have gone home and are staying home.</td>
</tr>
<tr>
<td>Our business revenues do not warrant us staying open ie. our net revenue is negative. We will stay open as long as we can in order to help our employees as much as we can.</td>
</tr>
<tr>
<td>Our gets through the spring with School tours and conventions and random tourist. We are unsure what the summer months will bring for tourist and our summer income effects our winter. Normally we are able to keep our doors open during the winter with our summer income. We will still be feeling the effects in Winter 2020 and spring of 2021.</td>
</tr>
</tbody>
</table>
Our guide and retail business is only between April & October so some of the questions on this survey do not apply to us.

Our summer tourism sales keep us afloat the remainder of the year. If people do not come to Montana we will continue to suffer.

Our wholesale customers who are tourist driven have delayed many shipments that should be shipping out now, however our retail orders are still strong on the website. I am currently fully staffed, however if this lasts too long we will look at a reduction in employee hours as I will not need the staff to continue building products without the wholesale orders. Our retail store is slower than normal but still open and operating.

Outfitting in Montana will tank this year/we can only hope people venture out to eat when this is all over-we were just starting to see people coming out of winter in the Bitterroot when this hit—probably too late to save some?

Part of the reason my business will die is because we rely on summer business to get us through the tough winter. Helena residents disappear in the winter. Why? This town is so hard to figure - unlike anywhere else I've lived.

Please make it obvious if you are asking for percentages or numbers in the cancelled bookings section. We are seeing cancellations of tour groups as far out as September already.

Prices increase because food supply chain prices are increasing dramatically and rapidly.

Restaurant/bars being closed indefinitely will certainly impact us beyond our opening date (whenever that may be, at this time it is April 16th). We anticipate folks continuing to be cautious when gathering and that we will have to plan for a much slower start to our highest revenue period.

Sales have plummeted and if the financial conditions don't change I may be forced to close my business.

So far we have just reduced hours.

The amount of curbside service has 75% less of income due to the environment we are in the last 4 weeks.

The closure of YNP has been the killer blow. Much like the virus itself, our reaction to it is worse than the actual infection. There is a huge and underestimated anti-Asian racism that runs deep in MT. Covid 19 has emboldened these racist tendencies. Stillwater, Park, and Yellowstone counties are not good places right now for our Asian friends and family.

There are questions in here do not pertain to my business really. We have not had any sick staff at all so we have not had to provide sick leave pay. We have tried very hard to keep people on staff with fewer hours. We opened up for two extra days per week to keep our sous chef on staff.

This business is me and my sons livelihood and it would be a devastation if we had to close down for any amount of time!

This has hurt our business and our way of life for your own family as well as our employees. Not sure how we will dig our way out with not having our doors open to survive.

This has not affected my business as we will not start operations until late May. But if things don't change and we still have this issue, I'm sure we will see significant loses to our business.
Here is a letter I have drafted to send to officials.

We own 3 outdoor retail businesses in Missoula, Montana that employed about 42 people until the Covid-19 virus struck. We have been hit hard with practically no cash flow in, I have stopped paying myself, and I am very worried that we may have to close completely and possibly even go bankrupt. This is my life’s work wherein we have truly put blood, sweat, and tears, and although I did plan for a “rainy day” I never could have anticipated this type of decimation (and I’m not being dramatic). I urge you to consider these solutions for Covid-19 economic loss to help small businesses survive:

- Require insurance companies to qualify Covid-19 as a natural disaster and therefore cover losses we are incurring with business interruption.
- Require all banks to switch all loans to interest only for the next six months while we recover.
- Postpone real estate taxes (many due in April)
- Stop all public utilities from collecting at this time in exchange for tax credits to the utilities.
- Provide grants for small businesses to cover these losses- or at least Business Interruption Loans that will have no interest. But please be weary of loans; we cannot afford to just dig a deeper hole that we will not be able to crawl out of so loans unless interest-free, will not help too much.
- Do not to count layoffs of employees against a business’s unemployment insurance rate.
- Removing the requirement that small businesses demonstrate that they cannot access credit elsewhere before receiving a SBA-disaster loan. Or better yet, create special “Business Interruption Grants”. We do not want to dig a deep hole with loans and many businesses will just choose to close instead. With this being said, do NOT penalize the businesses that were responsible and saved money for a “rainy day” and only give support to ones that are about to fail right now. Please make the support based on business revenue lost.
- Instituting a temporary payroll tax holiday for the next 6 months wherein businesses do not pay any payroll taxes. A few notes about retail business: Temporary shutdowns of malls and retail outlets will lead to a combined loss of gross retail revenues may be in the range of $274.3 billion based upon 2018 data, the equivalent of a 5 percent annual reduction in sales.
- The indirect and induced output or the so-called ripple effects amount to $155.5 billion. This adds up to a total loss in sales for the economy due to retail losses of $429.9 billion.
- An estimated 906,508 retail industry jobs are in peril.
- The loss of retail sales has an impact on the broader economy-wide job market where another 762,421 jobs would be imperiled. Total jobs impacts amount to 1.7 million for the economy due to retail sales reductions. Please vote to support the Covid-3 package and include “Business Interruption Grants.” These truly are unprecedented times, and we need unprecedented action to help small businesses survive, which will in turn helps America’s economy survive. Thank you.

This survey is really geared toward hoteliers. As a Bar, we are 100% affected by a reduction in tourism. We are also 100% affected by being closed and laying off all our employees.

Those in tourist related stores, wholesale, crafters make 80% of annual income between March and Sept. Thus will impact entire year. I expect to lose up to 80% of annual income.

Tourism for our community generally begins in April. Tourism contributes to more than half my annual gross sales. I anticipate this "shut down" will significantly impact my business in a very negative way.

Tourism has gone down extremely and it’s a basis of my business.

We are 3/4ths dine in service and have lost all that business due to the restrictions. We are able to do carry out, however due to the slowdown I have had to lay off 90% percent of my employees!

We are a 501c3 all-volunteer organization that owns and maintains public parks. Park use has increased substantially with businesses and schools closed. We have not seen or made any other changes in response to the pandemic.
Tourism-Related Business Owners Speak Out About COVID-19 Impacts

We are a leather goods and footwear retailer that has been in downtown Missoula for 48 years (since 1972). We are paying all of our employee's normal wages for the next 3+ weeks we will be closed for sure (thru 4/19). We will probably have to rely on the State & Fed contributions to unemployment after that.

We are a small privately owned business, and depend on the tourists, hunters, fisherman, and locals to support our business. We are classified as a nonessential business. But we need people to start shopping again or we will be forced to close our doors. Our community cannot afford to have another business close for any reason. We may not be that essential grocery store or gas station, but we still provide the town with a service. bills are stacking up.

We are always closed this time of the year and open Memorial Day.

We are in a remote section of the Big Hole River in Wise River Montana, a small portion of our business (15%) is local and truck business passing through the majority of our clientele are fly fishermen, campers and long distance cyclists. We will be hard pressed to keep our business open unless we get some financial help to carry us through the next 3 months.

We are increases online marketing.

We are increasing our virtual offerings on Facebook, Instagram and Twitter and looking at educational resources for teachers now conducting classes remotely and opportunities to take our events (star parties, lectures) to a virtual stage. We are discussing alternatives as far out as July, but have made no cancellations at this time and are instead moving in-person events through April (and through May 11 in the case of Dark Sky outreach) to online platforms.

We are not the kind of establishment that typically requires any kind of reservation. We did have a group that was to come in late at night that called ahead and had to cancel. Our business is walk-ins. Regulars, locals, and people who come in for in-town events. We have lost a STAGGERING amount of business. I would say that our tills are 10% of what they would usually be. We want to work. Our employees want to work. This is indescribably frustrating.

We are preparing for no business customers, preparing that income to be reduced about 85% as it has the last two weeks, cutting all expenses and labor, my employees are elderly and have voluntarily self-isolated for their protection, however, we have a website and that business is picking up.

We are presently not open for the season- we operate from Memorial Day to Labor Day

We are selling boats and boat accessories. With the limited travel and crash in the markets, I believe the public is scaling back the amount of money spent on these items.

We are trying to help people as they need.

We do benefit from tourists traveling through our state through the summer months but we can survive without that portion of our business

We had to close our business on March 20th due to the county law and the corona virus. We are in limbo on when we can reopen. My biggest fear is when we are allowed to open, what do we have to look forward to? In our area we rely on that 8-10 weeks of summer of tourism to hold us through the winter months. I do not see that happening. 1) peoples fear of traveling due to the virus and 2), the tourist will not have the money to travel due to the virus layoffs. Also my local trade is nothing for we are required to close for now and when we open our local area will be still trying to catch up so there will be no money to go out and eat or socialize.

We have been trying to move items to online sales to keep things going. But overall I think people are not shopping. Most are scared.

We have had to cancel fundraisers which is a huge part of our funding. If no visitors are stopping then no visitors are helping us stay afloat.

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Tourism-Related Business Owners Speak Out About COVID-19 Impacts

We have had to shut down temporarily and lay off all of our employees due to public and government policies and protections. We have lost half of our revenue for the month of March. We were slated to do 20% more business than March last year so this is a huge blow. We have had few calls for future reservations. The majority of people have cancelled reservations or we have had to cancel their reservations due to public policy. No new reservations have been made due to Covid 19 uncertainty in our community and in our country. We are staying afloat but the future of our business looks bleak.

We own a deli, even before Coronavirus, a lot of our orders were to go. It has slowed down by 1/3 but we added delivery during the period that we didn’t do before.

We own a small restaurant/bar and were forced to go to takeout only. We employee 10 employees that are forced to have their hours reduced to 1/2 of what they were working and are not making any tips and our daily income has been reduced by 2/3.

We produce books for and sell books to primarily to Specialty Retailers in the tourism industry both in Montana and across the nation. Everyone has cancelled their orders. The phones are almost completely silent.

We were scheduled to open April 1. Opening is now postponed. A major capital project was set to begin. That has now been delayed. We anticipate several more school cancellations which are our major income maker in April and May. Hours will most likely be reduced once open as the budget may not allow us to fully staff.

We’re in the process of switching to a more automated and restrictive business - more on-line ordering, take out service and delivery. Critical services such as vehicle shuttles will see price increases and limited offerings due to the need of social distancing. Other services such as daily housekeeping will be suspended. Inside dining will no longer be offered. In-store retail shopping will be reduced and crowd size greatly restricted. Overall, the fly-fishing experience off the Missouri River will lose its charm.

We've had to reduce our hours. Our sales have declined about 65%.

While we are in a very tough time we will endure and come out of this. The tourism industry has done and I expect will do a great job helping us cope with everything.

Will try to stay in business as long as possible, very difficult with zero revenue.

With the closing of the Big Sky Resort and many other businesses in Big Sky, the demand for public transportation services has fallen off sharply. However, we are providing as much service as necessary. We will see how the conditions continue to change.

You might consider adding Wineries to the list of business types as we are major destinations and event centers nationwide and our models differ greatly from breweries and distilleries.

Your previous question on canceled reservations was geared to only part of the segment that you are surveying. WE have lost admission...and funders...and one exhibition that we have to scramble to fill...not hotel room reservations as the survey indicates. There should be a place to estimate anticipated loss of revenue. We will likely lose $200,000-$500,000 in revenue that we will not be able to recapture this fiscal year.

Appendix D: Comments by Tourism Support Services

Tourism support services: land management; rental management; tourism promotion/advertising agency; even coordinator/manager; Finance/accounting; Association Director/chamber/CVB; construction; insurance; media; other service industry; other
Tourism-Related Business Owners Speak Out About COVID-19 Impacts

<table>
<thead>
<tr>
<th>Access to public lands has been a massive and critical stress reliever for our community. Getting folks to honor social distancing...not so great.</th>
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<tbody>
<tr>
<td>As a CVB Chamber hybrid director I have called various lodging related businesses. This is how I know their bookings have been cancelled or gone down but I could not provide an accurate number. However I think it is important to note that multiple entities I spoke with received a fair amount of new bookings for two-three days in advance. With the park closure I believe this will change.</td>
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<tr>
<td>As a daycare, it is difficult to anticipate how the downstream effects of this will dictate demand in the long run, and when it takes 6 weeks to onboard an employee, this is a HUGE deal.</td>
</tr>
<tr>
<td>As a local TBID, our short-term issues are dealing with event cancelations that had TBID grants. It won't be until summertime that the deposits from springtime assessments are made to the TBID by the hotels. At that time the impact of the organization may be felt, although we have a good reserve. The local hotels and ancillary businesses are currently reeling from the loss of the premier &quot;black ink&quot; event due to a cancelation.</td>
</tr>
<tr>
<td>As a writer with several promotions on the calendar for A Corner of Space and Time: Lee Nye's Eddies Club Portraits, my team is rescheduling signings and events into the late spring and summer. As chair of a non-profit, the Board is meeting remotely. The Bitterroot Trail is open for walking and riding.</td>
</tr>
<tr>
<td>as an operator of a non-profit agency operating a movie theater, closing is important in reducing exposure and lowering the curve. A life is more important that profit or the bottom line.</td>
</tr>
<tr>
<td>As I said, one of my business's is long term property management for employees in Big Sky. None have left, but all are not working for the month. I have reduced rents for two already.</td>
</tr>
<tr>
<td>At this time we've received a couple of inquiries regarding our cancellation policy. So far we've only had one cancellation and have had 4 inquires from folks wanting to rent immediately to get away from virus hot beds, but no bookings. Gauging from the lack of cancellations it appears most folks are sitting tight and waiting to see where we're at as the summer season gets closer. We manage over 30 vacation rental homes and for the most part are not seeing much affect so far. That said, new bookings are basically nil over the last two week period.</td>
</tr>
<tr>
<td>Chamber of Commerce being event driven, our events begin in May and going into the unknown, planning events is hard. It's hard to ask for sponsorship, when the world is dealing with this.</td>
</tr>
<tr>
<td>Changing the marketing message-now is not the time to come but we will be here when it is.</td>
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<tr>
<td>Concerned I will not have enough ad sales to get my next tourism pub out in May</td>
</tr>
<tr>
<td>Does not relate to our business.</td>
</tr>
<tr>
<td>Employment changes will impact our members and community, possibly for some time to come. The Park closure and delayed opening and hiring for the summer season will also impact our members. These actions are similar to what we took last year during the government shutdown.</td>
</tr>
<tr>
<td>I am highly disappointed that cosmetologist, estheticians, massage therapist, spa service providers were not included in the list of businesses to choose from at the beginning of this survey. Our services are highly used by tourists and the majority of our industry workers are made up of females who have taken the risk to open their own businesses and are working hard to provide for themselves and their families. We have been closed down due to the Coronavirus and most of us are going to struggle to get our feet back on the ground. Please add us to the list of professionals and start seeing us as such. Thank you.</td>
</tr>
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**Tourism-Related Business Owners Speak Out About COVID-19 Impacts**

<table>
<thead>
<tr>
<th>I and my students have noticed a decline in use of outdoor spaces by out-of-town people in the last week, but in general in-town folks seem to be recreating more. A few businesses that sell outdoor supplies and equipment also sell food, gas, etc. are still open. I normally take students in the field to learn and recreate and cannot now for at least two months. From talking to state and federal field scientists most aren’t sure what type of field season they can have or how many if any people they can hire. I have heard some summer field education programs from universities coming to Beaverhead Co. have already been cancelled, which could have a significant impact on summer recreation and tourism dollars.</th>
</tr>
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<tbody>
<tr>
<td>I do weddings. Most of my business begins the end of May to the end of October. However, the cancellation are starting to come in.</td>
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<tr>
<td>I have a hair salon and have had to close the doors.</td>
</tr>
<tr>
<td>I have had 2 families come by the Chamber who sought a lower populated area to visit. Was glad the doors were open.</td>
</tr>
<tr>
<td>I have not seen much change in my business this winter into early spring. I do feel my business will slow in the next few months due to the Corona Virus.</td>
</tr>
<tr>
<td>I own a tiny one chair salon in Big Sky and have now been closed for 1.5 weeks going on 3 more. This is a very scary and trying time for small business owners.</td>
</tr>
<tr>
<td>I simply hope the wide-open spaces so prevalent in Montana will be a key to getting people to our state.</td>
</tr>
<tr>
<td>I was laid off from my secondary job, which was travel and recreation-related.</td>
</tr>
<tr>
<td>I work at a Federally Qualified Health Center.</td>
</tr>
<tr>
<td>I'm just thankful I run a young lean business. Low overhead, and no employees yet. It may be hard, but as long as I don't quit I will bounce back. My thoughts go out to the many who aren’t as fortunate.</td>
</tr>
<tr>
<td>I’m not in tourism or recreation, so not sure how I got this survey, but the corona virus has definitely impacted my industry.</td>
</tr>
<tr>
<td>If Montana does not stop tourism or practice social distancing, Montana will have a disaster like Wuhan, Italy, Washington, or New York.</td>
</tr>
<tr>
<td>It may affect this summer do to travelers coming through for repairs on their windshields do to rocks from the highways</td>
</tr>
<tr>
<td>I’ve had a huge loss due to this, it may very well prove fatal for my business!!</td>
</tr>
<tr>
<td>Just watching and waiting to see how the housing in place works out and how travel restrictions affect areas of the US and the world.</td>
</tr>
<tr>
<td>Montana State Parks are not taking any new special use or commercial use permits. All visitor centers are closed. Parks are currently still open. All new employees hired traveling from out of state will be quarantined for 14 days. If possible, they can telework during their 14 days. All state park employees have the option to currently telework. All job interviews are encouraged to be phone interviews. State park maintenance staff are cleaning bathrooms twice a day with proper PPE and bleach mix. I have a camper from MN arriving this weekend.</td>
</tr>
<tr>
<td>Montana Wildlife Federation conference canceled their conference we were hosting, Montana Tech suits moved out without notice we did not charge them any fees for doing so, Airbnb change their policies to require us to refund all cancellations regardless if I refund policy, who’s travel nurses and it had people cancel reservations because they know travel nurses are here</td>
</tr>
<tr>
<td>Most of our business is in Big Sky providing babysitters to vacationing families. They all had to cancel their trips.</td>
</tr>
<tr>
<td>My business is a weekly newspaper so not much impact due to tourism. Have lost some advertising revenue due to business places being closed</td>
</tr>
</tbody>
</table>
My income for March is half expected and there will be no income for April or May as all those bookings have canceled. I anticipate that the majority or perhaps all of my June travelers will cancel as well. I am paid after clients travel, so many of the bookings I worked hard for in 2019 for travel in 2020 are wiped out.

My schedule was booked for keynote speaking and workshop engagements across the state between April - October, all but one have canceled or postponed, and the one shifted to an online/webinar format. Out-of-state companies had been reaching out about having retreats for remote employees in Montana, none have booked and inquiries have completely stopped.

No one is traveling to Montana and we survive on tourism and need people to travel! I work in a salon that is considered none essential to people so I have had many cancellations.

Normally, I open our Ice Cream parlor/coffee shop the first week of April, of course that has been delayed, but as so as it is allowed we will open for our customers, business as usual. However, as summer approaches, it is possible that our tourism traffic on Hwy. 2 will be affected by this virus. We are hopeful for a good summer!

Not sure what the future for summer tourism will bring as that is 90% of our business so am lowering the amount of inventory for now.

Our brands sell gear for outdoor recreation. The hardgoods biz has seen a decrease in sales. The food company is struggling to keep product on the shelf. And the gear care company has seen a slowdown in business, but an uptick in coverage because people have time to care for their gear and are not buying new.

Our business does not do anything with tourism or recreation.

Our tourism rental is empty. Our 16 home rentals to service industry and Big Sky / Bozeman construction workers & cleaning staff are all laid off as of last FR March 21, 2020. They fear being homeless. One of our most valued tenants is in the hospital after a panic attack over COVID19. People are begging to stay in their homes. They want to work but COVID19 POSITIVE testing results are high in BIG SKY is requiring employers to send workers home from SP & TYC! Employers to shut workers out.

Ranching/farming is largest business in Montana. It should be in the mix. I had to do a bull sale yesterday on internet. It worked well, but the registered breeder, should have cancelled the sale, I could see on the TV lots of people at sale, kids etc that should not have been exposed to so many people from all over the two-state area.


The impact on our local community is going to be staggering. Estimate 90-95% of the local economy is tied to tourism and hospitality, as a financial institution we will be very busy assisting customers in a time of financial distress.

There may be some businesses advertising in the newspaper to inform the community of cancellations with their events or business.

Too much hysteria

Tourism and recreation are important to our state, but this is the time for everything to shut down and everyone to stay home.

Tourism and recreation industry does not affect my business.

We are a non-profit providing support for tourism and economic development. Our events are almost entirely summer and fall based. We have no plans to cancel. All that has been affected at this point is fund raising for our new visitor center refurb, and meetings.
Tourism-Related Business Owners Speak Out About COVID-19 Impacts

We are a public library and we serve many tourists during the year. In a small town they rely on us for computer and wireless use and printing and fax services. They come to us to find out more information about local history and since we are close to Glacier National Park they ask for information about hiking trails and maps. While we understand the need for temporary closure it will be difficult to maintain our trained and knowledgeable employees when they are not paid and our county government is using the covid 19 as a cover for a plan to not reopen the library due to lack of funding and mismanagement on their part.

We are a wedding venue and luckily it’s just my husband and I that work in our company, so we haven’t had to worry about any employees. We have had to postpone many of our events that are schedule in May, and likely several in June as well. Things are very up in the air and we are handling the rescheduling of events on a week by week basis. We are very concerned about how this will also affect many of our wedding vendors located in Missoula. What we imagine happening is a vast decline in the amount of guests attending those events that will take place this year. This has had a drastic effect on our cash flow this year and events that need to be postponed to 2021 will greatly affect our income for that year because we will have fewer new bookings.

We are an event driven Chamber of Commerce with our first event May 14th and then June 6-7, we are in limbo at this time. We have had some major events in our area (sponsored by other local groups) that have affected our local economy.

We are concerned that the effects of Coronavirus may affect our ability to book performances next year due to business failures, increased prices for performances, or unknown startup again for touring companies.

We are dependent on the travel industry and our income has significantly dropped since the travel shutdowns.

We are learning to offer our educational programs in an online setting

We are radio. When businesses who advertise with us are forced to close, they don't have any customers. Therefore, I don't have advertisers. Big problem.

We are unable to have a salesman visit any new/potential customers in their business. Makes it difficult to show our paper to people who have never seen it before and discuss the benefits and specials we have.

We had an increase of people stopping in our city who were returning to Canada from the south. We did not have any of them stop at the VIC except wanting to use the restroom. Since we are located within an existing business, signs were posted on doors that restrooms were unavailable for public use. Since the posting there haven't been any visitors but phone calls asking about business closures and walking trails in the area.

We have a Vacation Rental Business in Whitefish, MT which has literally ground to a halt. When whitefish Mountain Resort closed early all our remaining ski business cancelled and had to be issued full refunds. We have no work for our cleaners and we have no resources to pay our two property managers or their and our health insurance going forward. We also manufacture novelty signs, magnets, patches, decals and keychains for National Park gift stores. March and April are our normal order fulfillment months for that business but having spent the money to produce the product all the orders have been cancelled. We are in deep trouble.

We have worked hard to attract out-of-area clients, especially annual national events, and large local corporate appreciation events to augment weddings, non-profits, memorials, retirement parties, and graduations. Sadly, all of the events beginning in March to date and beyond have either canceled or rescheduled due to Covid-19. As of this writing, we are having to absorb from our pocket over $10,000 per month in overhead expenses and are tracking to a loss in revenue of more than $250,000 if and net income including of more than $100,000 if the restrictions continue. We will not be forced to close permanently unless this virus mutates, but more than anything this is causing huge stress to our clients, namely non-profits and brides, and seasonal employees.

We serve senior population and Meals on Wheels.
Tourism-Related Business Owners Speak Out About COVID-19 Impacts

We've had to pull advertising for our clients and/or change the messaging. We've been able to counter-balance some of these losses because some of our clients have come to us to have coronavirus content placed on their websites.

When I say reservations on the earlier page I mean "wholesale orders" much of our business is to souvenir stores and National Parks. Delaware North a huge customer of ours has cancelled or delayed all its orders with us for this summer.

Wish we could just get back to normal. Either you're going to get the bat soup flu or you're not. This "shut the nation down" is what is unhealthy. If we don't have a good economy, we no longer have a country.

With all the events cancelling/postponing around the western US, we are sticking with our plan to hold an event in Missoula in July for now. As more information becomes available and guidelines change, we will reassess our plans. As of now, the conversations we were having with businesses about being exhibitors at our event have (understandably) come to a grinding halt. We are all waiting to see what happens and hoping that we're able to reduce the curve so that everyone can be outside and have fun this summer.