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MT TOURISM

2010 Review; 2011 Outlook

Results by State, Region, and Business



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Research Report 2010-7
December 2010

This report was funded by the Lodging Facility Use Tax

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Executive Summary

A web-based survey was administered October 20-27, 2010 to all tourism business owners and managers represented in the Montana Vacation Planner as well as attendees to the 2010 Governor’s Conference on Tourism. The purpose of the survey was to assess the change in visitation from 2009 to 2010 and to project visitation for 2011. There were 357 respondents representing accommodations, attractions, tour and guide operations, tourism and event planners, and tourism promoters.

Overall quantitative results indicate that 61 percent of business owners had an increase in visitation in 2010, 23 percent had a decrease and 15 percent stayed the same as 2009. Tourism businesses that experienced an increase cited repeat visitors (55%), better marketing (46%), and affordability of what was offered (40%), as reasons for their increase. The state of the U.S. economy (85%) was cited by many businesses as a reason for the decrease in visitation, as well as fewer leisure travelers (42%). The majority (65%) of tourism businesses do not intend to expand, change, or sell their business in 2011.

For 2011, 55 percent of tourism businesses are expecting their visitation to increase compared to 2010 while 37 percent believe their visitation will remain the same. Eight percent think their visitation will decrease. The top reasons cited for expected positive numbers in 2011 include repeat business, increased bookings and inquiries, and a gradual increase in business. The U.S. economy was expressed by 78 percent of businesses believing a decrease was in order for 2011. This is verified by 59 percent of businesses who say their bookings are down for 2011. Forty-eight percent of the businesses are expecting fewer leisure travelers in the upcoming year.

Differences emerged in visitation trends for 2010 and expected trends for 2011 by travel region and business type.

Region and Business Category	Visitation in 2010			Expected Visitation in 2011		
	Increased	Decreased	Remained the same	Expect an increase	Expect a decrease	Remain same
Travel Region						
Glacier Country	65%	16%	20%	45%	5%	50%
Yellowstone Country	65%	24%	12%	61%	6%	33%
Gold West Country	59%	29%	12%	59%	11%	30%
Custer Country	53%	38%	9%	66%	19%	16%
Russell and Missouri River Countries	52%	24%	24%	53%	9%	38%
Business Category						
Hotel/motel	71%	26%	3%	48%	13%	39%
Vacation homes, condos and cabins	57%	21%	22%	52%	7%	42%
Ranches, resorts, lodges, hostels, hot springs	69%	29%	3%	53%	-	47%
Outfitters and guides	47%	35%	18%	42%	24%	33%
Tourism promotion organizations and advertising	66%	16%	19%	73%	-	27%
Bed and Breakfasts	64%	18%	18%	64%	11%	25%

Tourism industry respondents indicated that helping maintain Montana’s destination appeal (4.64 mean) was the top priority of seven Montana tourism charter-related statements followed closely by maintaining the character of Montana (4.60 mean). The statement, “strive to reduce energy consumption,” received the lowest priority rating (3.62 mean) by the industry. Since each of the seven statements received ratings over 3 on a 5-point scale, each item had a medium priority or higher.

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Introduction

Each autumn, the Institute for Tourism and Recreation Research at the University of Montana conducts a web survey of tourism businesses around the state of Montana. The businesses surveyed represent accommodations, attractions, tour operations, and tourism planners or promoters.

- Accommodations include hotels and motels, bed and breakfasts, ranches who accommodate visitors, resorts, lodges, hostels, hot springs with overnight accommodations, vacation homes, condominiums, rental cabins, and public and private campgrounds.
- Attractions include ski areas, museums, historic sites, and any other type of private or public attraction from caves to water parks.
- Tour operations include outfitters and guides, wagon train or cattle drives, and half-day to multi-day driving tours such as safari type experiences.
- Tourism planners and promoters include travel planners, event planners, and organizations that promote Montana or provide advertising services to Montana promoters.

Purpose

The purpose of the outlook survey was to assess the change in visitation from 2009 to 2010 and to project visitation for 2011. Additionally, respondents were asked to identify the causes of the change in visitation and the reason for the projected change in visitation. A second purpose was to assess the role Montana's tourism industry perceives they should play in selected geotourism attributes.

Methods

Data for this report were generated from a web-based survey of Montana tourism business owners. All businesses represented in the 2010-2011 Montana Vacation Planner, a publication of the Montana Office of Tourism, were included in the sampling frame as well as attendees to the 2010 Governor's Tourism Conference.

On Tuesday, October 23, 2010, an introductory email was sent to the approximately 2,500 tourism related businesses and organizations. This initial email was to inform the respondent of the upcoming survey which would arrive in their email inbox within a day (Appendix A – survey letters). On Wednesday, October 24, 2010, an explanatory email letter with a link to the survey was sent to the recipients (Appendix B – survey). Recipients were asked to complete the survey within seven days. One day before the due date, a reminder email was sent to the sample.

Completed surveys were received from 357 respondents. In web-based surveys, the sender is rarely notified if the survey ended up in the recipients 'junk' mailbox, therefore a true response rate based on surveys received is impossible to calculate.

Analysis

This report is divided into three analytic sections. First, all respondents were analyzed together for a full synopsis of tourism businesses in the state. Second, travel regions were highlighted by analyzing only the businesses within each travel region. Because of the small sample size from Russell Country and Missouri River Country, these two regions were combined as one.

Finally, six specific business industry categories were analyzed separately where sample size allowed. For this study, the individual businesses were: 1) Motels and hotels; 2) Vacation homes, condos and cabins; 3) Ranches, resorts, lodges, hostels, hot springs; 4) Outfitters and guides; 5) Tourism promotion organizations and advertising; 6) Bed and Breakfasts.

After the frequencies and percentages are displayed and discussed for the business section, comments provided by the respondents are displayed verbatim for each business category.

Montana Tourism: All Respondents

Average (mean) years business operated by current owners: 11.73
 Average (mean) years of business operation at current location: 23.68
 Range in years of operation by current owner: 6 months – 100 years
 Range in years of operation at current location: 1 – 112 years
 Sample size: 357

Travel Region Location	#	%*
Glacier Country	118	34%
Yellowstone Country	105	30%
Gold West Country	60	17%
Custer Country	32	9%
Russell Country	27	8%
Missouri River Country	6	2%

*percent may not add to 100 (rounding)

Type of Business	#	%
Motel/hotel	71	20%
Bed & Breakfast	28	8%
Ranches, resorts, lodges, hostels, hot springs	36	10%
Vacation homes, condos, cabins	92	26%
Public campgrounds	6	2%
Private campgrounds	13	4%
Outfitter/Guide	34	10%
Land management agency	2	1%
Tours	9	3%
Travel planners	3	1%
Event planners	4	1%
Vehicle rentals	3	1%
Ski area	6	2%
Museum, historic site	6	2%
Attraction	4	1%
Tourism promotion/advertising	34	10%
Other	5	1%

*percent may not add to 100 (rounding)

Change in visitors ('09 to '10)	#	%*
Increase	215	61%
Decrease	81	23%
Remained the same	54	15%

Reason for Increase in 2010 **	#	%*
Better marketing	98	46%
Improved website	68	32%
Expanded operations/services	29	14%
Returning guests	119	55%
Little competition in my area	20	9%
Affordability of what we offer	86	40%
U.S. economy	69	32%
Canadian exchange rate	21	10%
Other foreign exchange rates	9	4%
More local travelers	37	17%
More regional travelers	83	39%
Special event(s) held in our area	47	22%
Weather	18	8%
Fire activity	-	-
Lack of fires	41	19%
Other	32	15%

*respondents could check multiple answers **n=215

Reason for Decrease in 2010**	#	%*
Less advertising on our part	6	7%
Reduced offerings/services	2	3%
Fewer returning guests	19	24%
Increased competition in my area	11	14%
Our pricing may be too high	4	5%
U.S. economy	69	85%
Gas prices	23	28%
Exchange rates	-	-
Fewer local travelers	6	7%
Fewer regional travelers	15	19%
Fewer business travelers	12	15%
Fewer leisure travelers	34	42%
Changes in hunting/fishing licenses	7	9%
Construction in area	4	5%
Weather	16	20%
Fire activity	-	-
Lack of fires	-	-
Other	6	7%

*respondents could check multiple answers; **n=81

Outlook for 2011	#	%
Increase	188	55%
Decrease	27	8%
Remain the same	126	37%

Outlook for 2011	If had Increase in 2010 (n=206)		If had a Decrease in 2010 (n=77)	
	#	%	#	%
Increase	125	61%	32	42%
Decrease	9	4%	17	22%
Remain the same	72	35%	28	36%

Reason for Expected Increase in 2011 **	#	%*
Bookings/inquires are up	84	45%
More/better marketing pursued	80	43%
Improved website	60	32%
Experiencing a gradual increase	85	45%
Expanded or improved our offerings	48	26%
Affordability of what we offer	73	39%
Little competition in my area	17	9%
More local travelers	31	17%
More regional travelers	47	25%
We get many repeat customers	86	46%
Canadian exchange rate	12	6%
Other foreign exchange rates	6	3%
U.S. economy	66	35%
Special events in our area	30	16%
We are new, so we are increasing	28	15%
Other	15	8%

*respondents could check multiple answers
**n=188

Reason for Expected Decrease in 2011**	#	%*
Bookings/inquires are down	16	59%
We've done less marketing	1	4%
Experiencing a gradual decrease	-	-
Reduced our offerings/services	1	4%
Our pricing may be too high	1	4%
Increased competition in my area	4	15%
Expect fewer leisure travelers	13	48%
Expect fewer business travelers	4	15%
Expect fewer local travelers	3	11%
Expect fewer regional travelers	8	30%
Changes in hunting/fishing licenses	8	30%
Gas prices	9	33%
U.S. economy	21	78%
Global economy	8	30%
Other	4	15%

*respondents could check multiple answers **n=27

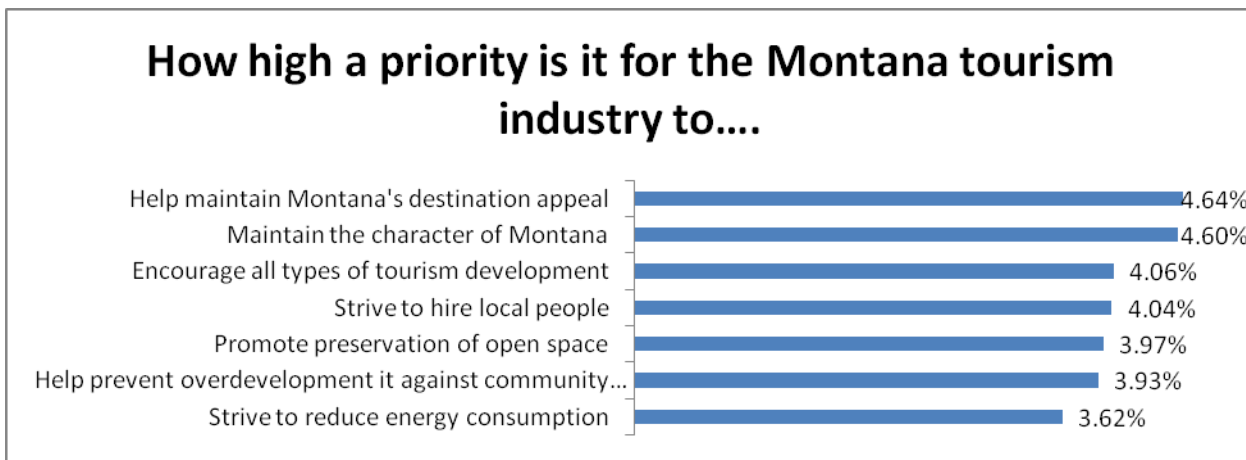
Plans for 2011**	#	%*
Expand current business or site	59	17%
Renovate current site	55	16%
Add more sites/business elsewhere	14	4%
Downsize current business or site	4	1%
Close down/sell business or site	8	2%
Remain the same	221	65%

*respondents could check multiple answers **n=341

What happened in regards to vacationers in 2010? n=341	Increased		Stayed the same		Decreased		NA
	#	%	#	%	#	%	%
Last minute bookings	145	44%	113	34%	27	8%	14%
Walk-in patrons	97	29%	87	26%	35	11%	34%
Retail sales	44	14%	50	16%	23	8%	62%
Dining out	23	8%	36	12%	12	4%	76%
Length of stay	80	25%	138	44%	47	15%	16%
Visitors seeking less expensive activities	136	44%	92	29%	10	3%	24%
# of Montanans traveling within the state	108	34%	131	41%	28	9%	16%

How high a priority is it for the Montana tourism industry to..... (n=352)	Very low priority	Somewhat low priority	Medium priority	Somewhat high priority	Very high priority	Mean
Help maintain Montana’s destination appeal	1%	1%	5%	19%	74%	4.64
Strive to hire local people	5%	4%	19%	27%	45%	4.04
Promote preservation of open space	5%	6%	20%	24%	45%	3.97
Help prevent overdevelopment if against community values	6%	8%	17%	26%	43%	3.93
Maintain the character of Montana	1%	1%	6%	19%	72%	4.60
Encourage all types of tourism development	4%	7%	18%	23%	49%	4.06
Strive to reduce energy consumption	8%	10%	27%	22%	33%	3.62

*percentages may not add to 100 due to rounding



Scale: 1=very low priority to 5=very high priority

MT Tourism All Responses: Summary and Implications

Summary

A full 61 percent of the tourism industry saw an increase in 2010, and only 8 percent are expecting a decrease in 2011. Returning guests, better marketing and affordability are credited for the increases in 2010. However, business owners still noticed that vacationers sought less expensive activities, and last minute bookings had increased for 44 percent of the tourism businesses. Apparently, vacationers were still a little wary in 2010.

Tourism industry respondents indicated that helping maintain Montana’s destination appeal was the top priority of seven Montana tourism charter-related statements, followed closely by maintaining the character of Montana. The statement, “strive to reduce energy consumption,” received the lowest priority rating by the industry.

Implications

Montana tourism is on the rebound from the economic recession, and, according to the U.S. Travel Association, it is rebounding throughout the United States. This is an opportune time to remind potential travelers what Montana has to offer. Three key elements are needed: 1) marketing; 2) keeping abreast of the competition, and; 3) Letting potential visitors know that maintaining Montana’s character is as important to the tourism industry as it is to people visiting.

Glacier Country

Average (mean) years business operated by current owners: 11.93
 Average (mean) years of business operation at current location: 23.28
 Range in years of operation by current owner: 6 months – 96 years
 Range in years of operation at current location: 1 – 112 years
 Sample size: 118

Glacier Country

Glacier Country respondents represent 34% of all respondents to the outlook survey.

The accommodation sector represented the highest group of respondents in Glacier Country at 78% of all respondents

Type of Business	#	%
Motel/hotel	22	19%
Bed & Breakfast	17	14%
Ranches, resorts, lodges, hostels, hot springs	15	13%
Vacation homes, condos, cabins	30	25%
Public campgrounds	2	2%
Private campgrounds	6	5%
Outfitter/Guide	7	6%
Land management agency	1	1%
Tours	2	2%
Travel planners	1	1%
Event planners	1	1%
Vehicle rentals	2	2%
Ski area	1	1%
Museum, historic site	1	1%
Attraction	2	2%
Tourism promotion/advertising	6	5%
Other	2	2%

*percent may not add to 100 (rounding)

Change in visitors ('09 to '10)	#	%*
Increase	75	65%
Decrease	18	16%
Remained the same	23	20%

Reason for Increase in 2010 **	#	%*
Better marketing	32	43%
Improved website	23	31%
Expanded operations/services	10	13%
Returning guests	38	51%
Little competition in my area	10	13%
Affordability of what we offer	26	35%
U.S. economy	27	36%
Canadian exchange rate	10	13%
Other foreign exchange rates	3	4%
More local travelers	10	13%
More regional travelers	25	33%
Special event(s) held in our area	26	35%
Weather	3	4%
Fire activity	-	-
Lack of fires	19	25%
Other	9	12%

*respondents could check multiple answers **n=75

Reason for Decrease in 2010**	#	%*
Less advertising on our part	2	11%
Reduced offerings/services	1	6%
Fewer returning guests	3	17%
Increased competition in my area	4	22%
Our pricing may be too high	-	-
U.S. economy	16	89%
Gas prices	4	22%
Exchange rates	-	-
Fewer local travelers	3	17%
Fewer regional travelers	5	28%
Fewer business travelers	3	17%
Fewer leisure travelers	7	39%
Changes in hunting/fishing licenses	-	-
Construction in area	-	-
Weather	3	17%
Fire activity	-	-
Lack of fires	-	-
Other	1	6%

*respondents could check multiple answers **n=18

Outlook for 2011	#	%
Increase	52	45%
Decrease	6	5%
Remain the same	57	50%

Outlook for 2011	If had Increase in 2010 (n=73)		If had a Decrease in 2010 (n=18)	
	#	%	#	%
Increase	36	49%	5	28%
Decrease	4	6%	2	11%
Remain the same	33	45%	11	61%

Reason for Expected Increase in 2011 **	#	%*
Bookings/inquires are up	29	56%
More/better marketing pursued	33	64%
Improved website	13	25%
Experiencing a gradual increase	25	48%
Expanded or improved our offerings	36	69%
Affordability of what we offer	34	65%
Little competition in my area	7	14%
More local travelers	6	12%
More regional travelers	10	19%
We get many repeat customers	23	44%
Canadian exchange rate	6	12%
Other foreign exchange rates	2	4%
U.S. economy	31	60%
Special events in our area	9	17%
We are new, so we are increasing	11	21%
Other	3	6%

*respondents could check multiple answers
**n=52

Reason for Expected Decrease in 2011**	#
Bookings/inquires are down	1
We've done less marketing	-
Experiencing a gradual decrease	-
Reduced our offerings/services	-
Our pricing may be too high	-
Increased competition in my area	1
Expect fewer leisure travelers	2
Expect fewer business travelers	1
Expect fewer local travelers	1
Expect fewer regional travelers	1
Changes in hunting/fishing licenses	-
Gas prices	2
U.S. economy	5
Global economy	3
Other	2

*respondents could check multiple answers
**n=6

Plans for 2011**	#	%*
Expand current business or site	17	15%
Renovate current site	16	14%
Add more sites/business elsewhere	4	4%
Downsize current business or site	2	2%
Close down/sell business or site	3	3%
Remain the same	76	67%

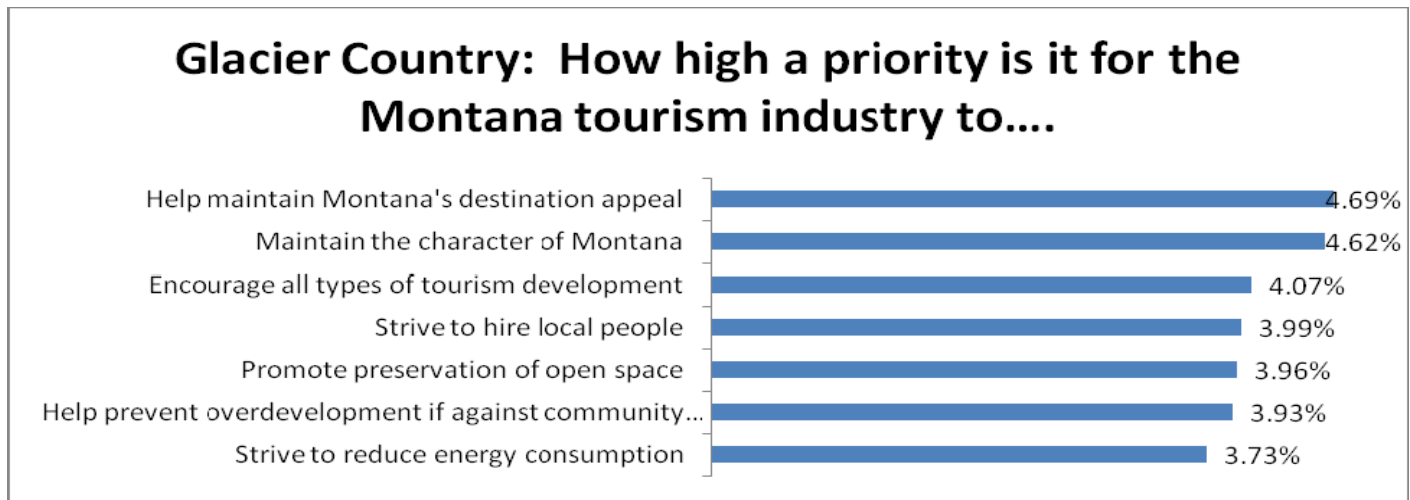
*respondents could check multiple answers
**n=118

What happened in regards to vacationers in 2010? N=118	Increased		Stayed the same		Decreased		NA
	#	%	#	%	#	%	
Last minute bookings	47	42%	48	43%	9	8%	8%
Walk-in patrons	34	30%	37	33%	12	11%	26%
Retail sales	16	16%	20	19%	12	12%	53%
Dining out	13	13%	12	12%	3	3%	72%
Length of stay	21	20%	56	53%	15	14%	12%
Visitors seeking less expensive activities	45	43%	31	30%	6	6%	22%
# of Montanans traveling within the state	35	32%	50	46%	9	8%	14%

*row percents do not add to 100 because respondents could answer "does not apply"

How high a priority is it for the Montana tourism industry to..... (n=118)	Very low priority	Somewhat low priority	Medium priority	Somewhat high priority	Very high priority	Mean
Help maintain Montana’s destination appeal	1%	1%	3%	19%	7%	4.69
Strive to hire local people	4%	3%	20%	34%	39%	3.99
Promote preservation of open space	4%	7%	22%	23%	44%	3.96
Help prevent overdevelopment if against community values	6%	8%	15%	31%	41%	3.93
Maintain the character of Montana	2%	1%	5%	18%	74%	4.62
Encourage all types of tourism development	4%	6%	16%	26%	48%	4.07
Strive to reduce energy consumption	5%	11%	23%	28%	33%	3.73

*percentages may not add to 100 due to rounding



Scale: 1=very low priority to 5=very high priority

Glacier Country Summary

More respondents (65%) from Glacier Country region experienced an increase in 2010 visitation than all other regions (but on par with Yellowstone Country). These respondents are very hopeful for 2011 since only five percent believe they will have a decrease in 2011. While 56 percent said inquiries are up for 2011, more businesses indicated affordability (65%), more and better marketing they are doing (64%) and the U.S. economy (60%) as to why 2011 should be a good year.

Glacier Country tourism industry respondents indicated that helping maintain Montana’s destination appeal was the top priority of seven Montana tourism charter-related statements followed closely by maintaining the character of Montana. The statement, “strive to reduce energy consumption,” received the lowest priority rating by the industry.

Future business plans by respondents in Glacier Country indicate they will make no changes to their business (67%); however, 29 percent said they will either expand or renovate in 2011. This indicates a healthy attitude for their business and the future of tourism in Montana.

Yellowstone Country

Average (mean) years business operated by current owners: 9.14
 Average (mean) years of business operation at current location: 21.24
 Range in years of operation by current owner: 1 – 65 years
 Range in years of operation at current location: 1 – 104 years
 Sample size: 105

Yellowstone Travel Region

Yellowstone Country respondents represent 30% of all respondents to the outlook survey.
 The accommodation sector represented 71% of all types of tourism business.

Type of Business	#	%
Motel/hotel	15	14%
Bed & Breakfast	1	1%
Ranches, resorts, lodges, hostels, hot springs	9	9%
Vacation homes, condos, cabins	49	47%
Public campgrounds	-	-
Private campgrounds	-	-
Outfitter/Guide	10	10%
Land management agency	-	-
Tours	3	3%
Travel planners	1	1%
Event planners	2	2%
Vehicle rentals	1	1%
Ski area	2	2%
Museum, historic site	-	-
Attraction	-	-
Tourism promotion/advertising	9	9%
Other	2	2%

*percent may not add to 100 (rounding)

Change in visitors ('09 to '10)	#	%*
Increase	66	65%
Decrease	24	24%
Remained the same	12	12%

Reason for Increase in 2010 **	#	%*
Better marketing	34	52%
Improved website	50	76%
Expanded operations/services	5	8%
Returning guests	29	44%
Little competition in my area	5	8%
Affordability of what we offer	27	41%
U.S. economy	27	41%
Canadian exchange rate	2	3%
Other foreign exchange rates	2	3%
More local travelers	12	18%
More regional travelers	27	41%
Special event(s) held in our area	2	3%
Weather	7	11%
Fire activity	-	-
Lack of fires	13	20%
Other	6	9%

*respondents could check multiple answers **n=66

Reason for Decrease in 2010**	#	%*
Less advertising on our part	-	-
Reduced offerings/services	-	-
Fewer returning guests	6	25%
Increased competition in my area	6	25%
Our pricing may be too high	1	4%
U.S. economy	23	96%
Gas prices	3	13%
Exchange rates	-	-
Fewer local travelers	2	8%
Fewer regional travelers	3	13%
Fewer business travelers	3	13%
Fewer leisure travelers	10	42%
Changes in hunting/fishing licenses	1	4%
Construction in area	1	4%
Weather	3	13%
Fire activity	-	-
Lack of fires	-	-
Other	3	13%

*respondents could check multiple answers; **n=24

Outlook for 2011	#	%
Increase	62	61%
Decrease	6	6%
Remain the same	33	33%

Outlook for 2011	If had Increase in 2010 (n=66)		If had a Decrease in 2010 (n=24)	
	#	%	#	%
Increase	44	67%	11	46%
Decrease	1	2%	4	17%
Remain the same	18	29%	9	38%

Reason for Expected Increase in 2011 **	#	%*
Bookings/inquires are up	35	57%
More/better marketing pursued	31	50%
Improved website	18	29%
Experiencing a gradual increase	24	39%
Expanded or improved our offerings	12	19%
Affordability of what we offer	24	39%
Little competition in my area	6	10%
More local travelers	8	13%
More regional travelers	15	24%
We get many repeat customers	20	32%
Canadian exchange rate	1	2%
Other foreign exchange rates	1	2%
U.S. economy	27	44%
Special events in our area	4	7%
We are new, so we are increasing	7	11%
Other	4	7%

*respondents could check multiple answers
**n=62

Reason for Expected Decrease in 2011**	#
Bookings/inquires are down	6
We've done less marketing	-
Experiencing a gradual decrease	-
Reduced our offerings/services	1
Our pricing may be too high	1
Increased competition in my area	2
Expect fewer leisure travelers	4
Expect fewer business travelers	1
Expect fewer local travelers	1
Expect fewer regional travelers	2
Changes in hunting/fishing licenses	2
Gas prices	-
U.S. economy	4
Global economy	1
Other	-

*respondents could check multiple answers **n=6

Plans for 2011**	#	%*
Expand current business or site	18	18%
Renovate current site	13	13%
Add more sites/business elsewhere	4	4%
Downsize current business or site	1	1%
Close down/sell business or site	2	2%
Remain the same	67	66%

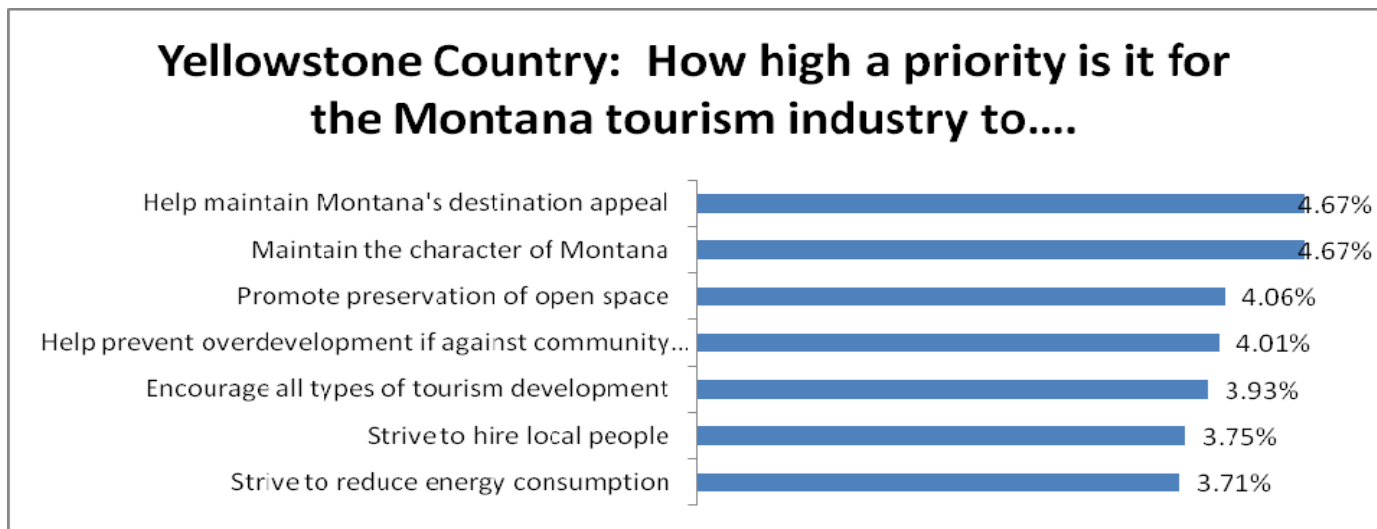
*respondents could check multiple answers **n=105

What happened in regards to vacationers in 2010? N=105	Increased		Stayed the same		Decreased		NA
	#	%	#	%	#	%	
Last minute bookings	49	49%	30	30%	8	8%	13%
Walk-in patrons	22	22%	18	18%	6	6%	53%
Retail sales	13	14%	11	12%	2	2%	71%
Dining out	6	7%	11	13%	3	3%	77%
Length of stay	30	31%	32	33%	20	21%	15%
Visitors seeking less expensive activities	43	46%	30	32%	-	-	22%
# of Montanans traveling within the state	28	29%	41	43%	9	9%	19%

*row percents do not add to 100 because respondents could answer "does not apply"

How high a priority is it for the Montana tourism industry to..... (n=105)	Very low priority	Some what low priority	Medium priority	Some what high priority	Very high priority	Mean
Help maintain Montana’s destination appeal	1%	2%	2%	19%	76%	4.67
Strive to hire local people	10%	7%	19%	27%	37%	3.75
Promote preservation of open space	4%	6%	19%	23%	49%	4.06
Help prevent overdevelopment if against community values	4%	8%	16%	27%	45%	4.01
Maintain the character of Montana	1%	2%	2%	19%	76%	4.67
Encourage all types of tourism development	4%	9%	21%	23%	44%	3.93
Strive to reduce energy consumption	6%	12%	24%	24%	35%	3.71

*percents may not add to 100 due to rounding



Scale: 1=very low priority to 5=very high priority

Yellowstone Country Summary

Respondents from Yellowstone Country and Glacier Country (65% each) experienced an increase in 2010 visitation much higher than all other travel regions in Montana. Yellowstone Country respondents are very hopeful for 2011 since only six percent believe they will have a decrease in 2011. The number one reason for a positive outlook is an increase in inquiries and their pursuit of more and better marketing.

Yellowstone Country tourism industry respondents indicated that helping maintain Montana’s destination appeal was the top priority of seven Montana tourism charter-related statements followed closely by maintaining the character of Montana. The statement, “strive to reduce energy consumption,” received the lowest priority rating by the industry.

Future business plans by respondents in Yellowstone Country indicate they will make no changes to their business (66%); however, 31 percent said they will either expand or renovate in 2011. Similar to Glacier Country respondents, this indicates a healthy attitude for their business and the future of tourism in Montana.

Gold West Country

Average (mean) years business operated by current owners: 12.64
 Average (mean) years of business operation at current location: 24.25
 Range in years of operation by current owner: 1 year – 55 years
 Range in years of operation at current location: 1 – 104 years
 Sample size: 60

Gold West Country

Gold West Country respondents represent 17% of all respondents to the outlook survey. The accommodation sector represents 65% of all types of tourism businesses in this region's survey results.

*percent may not add to 100 (rounding)

Type of Business	#	%
Motel/hotel	16	27%
Bed & Breakfast	4	7%
Ranches, resorts, lodges, hostels, hot springs	8	13%
Vacation homes, condos, cabins	8	13%
Public campgrounds	2	3%
Private campgrounds	1	2%
Outfitter/Guide	7	12%
Land management agency	-	-
Tours	2	3%
Travel planners	-	-
Event planners	-	-
Vehicle rentals	-	-
Ski area	2	3%
Museum, historic site	1	2%
Attraction	-	-
Tourism promotion/advertising	9	15%
Other	-	-

*percent may not add to 100 (rounding)

Change in visitors ('09 to '10)	#	%*
Increase	34	59%
Decrease	17	29%
Remained the same	7	12%

Reason for Increase in 2010 **	#	%*
Better marketing	17	50%
Improved website	17	50%
Expanded operations/services	8	24%
Returning guests	23	68%
Little competition in my area	5	15%
Affordability of what we offer	16	47%
U.S. economy	5	15%
Canadian exchange rate	1	3%
Other foreign exchange rates	2	6%
More local travelers	5	15%
More regional travelers	12	35%
Special event(s) held in our area	10	29%
Weather	4	12%
Fire activity	-	-
Lack of fires	6	18%
Other	8	24%

*respondents could check multiple answers **n=34

Reason for Decrease in 2010**	#	%*
Less advertising on our part	2	12%
Reduced offerings/services	-	-
Fewer returning guests	8	47%
Increased competition in my area	-	-
Our pricing may be too high	1	6%
U.S. economy	16	94%
Gas prices	7	41%
Exchange rates	-	-
Fewer local travelers	-	-
Fewer regional travelers	3	18%
Fewer business travelers	3	18%
Fewer leisure travelers	9	53%
Changes in hunting/fishing licenses	2	12%
Construction in area	-	-
Weather	6	35%
Fire activity	-	-
Lack of fires	-	-
Other	1	6%

*respondents could check multiple answers; **n=17

Outlook for 2011	#	%
Increase	32	59%
Decrease	6	11%
Remain the same	16	30%

Outlook for 2011	If had Increase in 2010 (n=34)		If had a decrease in 2010 (n=17)	
	#	%	#	%
Increase	24	73%	3	23%
Decrease	-	-	6	46%
Remain the same	9	27%	4	31%

Reason for Expected Increase in 2011 **	#	%*
Bookings/inquires are up	11	34%
More/better marketing pursued	13	41%
Improved website	17	53%
Experiencing a gradual increase	15	47%
Expanded or improved our offerings	14	44%
Affordability of what we offer	13	41%
Little competition in my area	2	6%
More local travelers	8	25%
More regional travelers	12	38%
We get many repeat customers	20	63%
Canadian exchange rate	-	-
Other foreign exchange rates	1	3%
U.S. economy	10	31%
Special events in our area	8	25%
We are new, so we are increasing	6	19%
Other	3	9%

*respondents could check multiple answers
**n=32

Reason for Expected Decrease in 2011**	#
Bookings/inquires are down	6
We've done less marketing	1
Experiencing a gradual decrease	-
Reduced our offerings/services	-
Our pricing may be too high	-
Increased competition in my area	-
Expect fewer leisure travelers	5
Expect fewer business travelers	1
Expect fewer local travelers	1
Expect fewer regional travelers	3
Changes in hunting/fishing licenses	2
Gas prices	3
U.S. economy	6
Global economy	2
Other	-

*respondents could check multiple answers **n=6

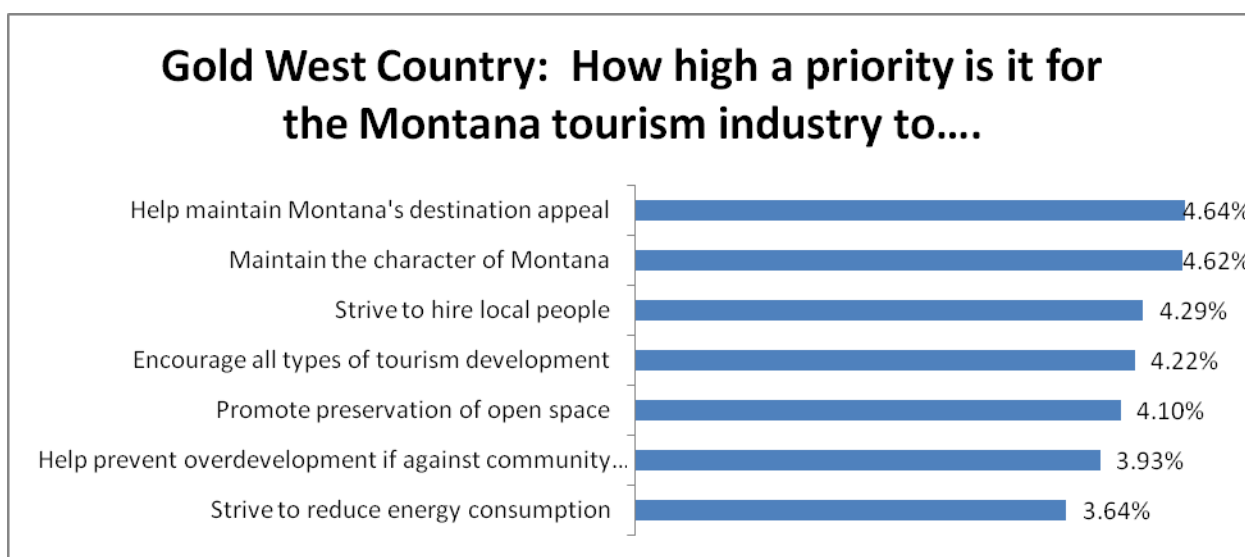
Plans for 2011**	#	%*
Expand current business or site	10	18%
Renovate current site	16	29%
Add more sites/business elsewhere	3	5%
Downsize current business or site	1	2%
Close down/sell business or site	1	2%
Remain the same	31	55%

*respondents could check multiple answers **n=60

What happened in regards to vacationers in 2010? N=60	Increased		Stayed the same		Decreased		NA
	#	%	#	%	#	%	
Last minute bookings	23	31%	12	23%	5	10%	23%
Walk-in patrons	16	18%	11	21%	9	17%	31%
Retail sales	5	11%	6	13%	2	4%	72%
Dining out	2	4%	4	9%	2	4%	82%
Length of stay	7	15%	23	49%	7	15%	21%
Visitors seeking less expensive activities	23	47%	9	18%	2	4%	31%
# of Montanans traveling within the state	20	42%	14	29%	5	10%	19%

How high a priority is it for the Montana tourism industry to..... (n=60)	Very low priority	Some what low priority	Medium priority	Some what high priority	Very high priority	Mean
Help maintain Montana’s destination appeal	2%	-	7%	16%	76%	4.64
Strive to hire local people	2%	-	27%	12%	59%	4.29
Promote preservation of open space	3%	3%	17%	32%	44%	4.10
Help prevent overdevelopment if against community values	5%	8%	20%	22%	45%	3.93
Maintain the character of Montana	-	-	8%	22%	70%	4.62
Encourage all types of tourism development	5%	2%	18%	17%	58%	4.22
Strive to reduce energy consumption	5%	7%	35%	21%	31%	3.64

*percents may not add to 100 due to rounding



Scale: 1=very low priority to 5=very high priority

Gold West Country Summary

Fifty-nine percent of Gold West Country respondents experienced an increase in 2010 visitation. This is six percent less than Glacier and Yellowstone country respondents but six to seven percent higher than the other travel regions in Montana. While the majority, (59%) expect an increase in 2011, those who believe 2011 will be a worse year indicate that bookings and inquiries are down. The number one reason for a positive outlook is an expectation of repeat customers and their improved website which would draw visitors to their area.

Gold West Country tourism industry respondents indicated that helping maintain Montana’s destination appeal was the top priority of seven Montana tourism charter-related statements followed closely by maintaining the character of Montana. The statement, “strive to reduce energy consumption,” received the lowest priority rating by the Gold West Country industry respondents.

Fifty-five percent of Gold West Country respondents said they will make no changes to their business in 2011; however, 47 percent of businesses in the region said they will either expand or renovate in 2011. This is the highest percent of any region indicating a very positive outlook from Gold West Country tourism leaders.

Custer Country

Average (mean) years business operated by current owners: 13.42
 Average (mean) years of business operation at current location: 23.02
 Range in years of operation by current owner: 2 – 50 years
 Range in years of operation at current location: 1 – 103 years
 Sample size: 32

Custer Country
Custer Country respondents represent 9% of all respondents to the outlook survey. The accommodation sector represents 49% of all types of tourism businesses in this region's survey results.

*percent may not add to 100 (rounding)

Type of Business	#	%
Motel/hotel	8	25%
Bed & Breakfast	3	9%
Ranches, resorts, lodges, hostels, hot springs	1	3%
Vacation homes, condos, cabins	1	3%
Public campgrounds	1	3%
Private campgrounds	2	6%
Outfitter/Guide	5	16%
Land management agency	-	-
Tours	1	3%
Travel planners	-	-
Event planners	-	-
Vehicle rentals	-	-
Ski area	-	-
Museum, historic site	4	13%
Attraction	1	3%
Tourism promotion/advertising	5	16%
Other	-	-

*percent may not add to 100 (rounding)

Change in visitors ('09 to '10)	#	%*
Increase	17	53%
Decrease	12	38%
Remained the same	3	9%

Reason for Increase in 2010 **	#	%*
Better marketing	8	47%
Improved website	6	35%
Expanded operations/services	5	29%
Returning guests	11	65%
Little competition in my area	-	-
Affordability of what we offer	6	35%
U.S. economy	3	18%
Canadian exchange rate	-	-
Other foreign exchange rates	-	-
More local travelers	3	18%
More regional travelers	8	47%
Special event(s) held in our area	4	24%
Weather	2	12%
Fire activity	-	-
Lack of fires	1	6%
Other	4	24%

*respondents could check multiple answers **n=17

Reason for Decrease in 2010**	#	%*
Less advertising on our part	1	8%
Reduced offerings/services	-	-
Fewer returning guests	-	-
Increased competition in my area	1	8%
Our pricing may be too high	-	-
U.S. economy	10	83%
Gas prices	5	42%
Exchange rates	-	-
Fewer local travelers	-	-
Fewer regional travelers	2	17%
Fewer business travelers	1	8%
Fewer leisure travelers	3	25%
Changes in hunting/fishing licenses	1	8%
Construction in area	2	17%
Weather	1	8%
Fire activity	-	-
Lack of fires	-	-
Other	1	8%

*respondents could check multiple answers; **n=12

Outlook for 2011	#	%
Increase	21	66%
Decrease	6	19%
Remain the same	5	16%

Outlook for 2011	If had Increase in 2010 (n=17)		If had a decrease in 2010 (n=12)	
	#	%	#	%
Increase	11	65%	8	67%
Decrease	3	18%	3	25%
Remain the same	3	18%	1	8%

Reason for Expected Increase in 2011 **	#	%*
Bookings/inquires are up	6	29%
More/better marketing pursued	11	52%
Improved website	5	24%
Experiencing a gradual increase	10	48%
Expanded or improved our offerings	1	5%
Affordability of what we offer	9	43%
Little competition in my area	1	5%
More local travelers	4	19%
More regional travelers	5	24%
We get many repeat customers	11	52%
Canadian exchange rate	-	-
Other foreign exchange rates	-	-
U.S. economy	2	10%
Special events in our area	2	10%
We are new, so we are increasing	1	5%
Other	3	14%

*respondents could check multiple answers
**n=21

Reason for Expected Decrease in 2011**	#
Bookings/inquires are down	2
We've done less marketing	-
Experiencing a gradual decrease	-
Reduced our offerings/services	-
Our pricing may be too high	-
Increased competition in my area	-
Expect fewer leisure travelers	1
Expect fewer business travelers	-
Expect fewer local travelers	-
Expect fewer regional travelers	1
Changes in hunting/fishing licenses	2
Gas prices	3
U.S. economy	5
Global economy	2
Other	2

*respondents could check multiple answers **n=6

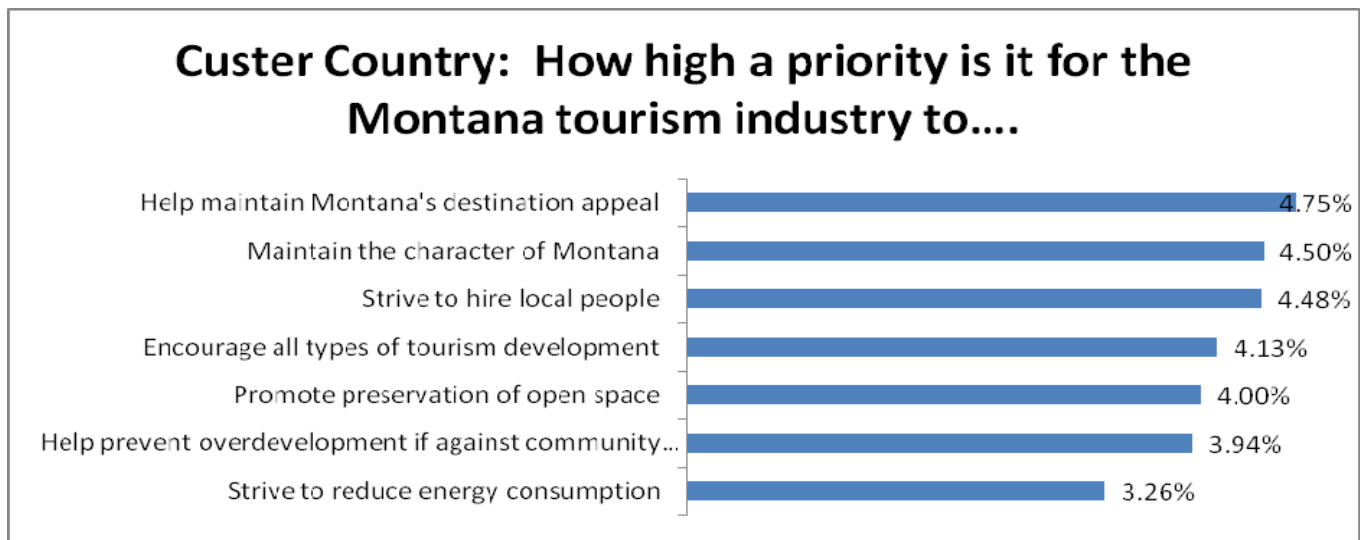
Plans for 2011**	#	%*
Expand current business or site	6	19%
Renovate current site	5	16%
Add more sites/business elsewhere	3	9%
Downsize current business or site	-	-
Close down/sell business or site	-	-
Remain the same	22	67%

*respondents could check multiple answers **n=32

What happened in regards to vacationers in 2010? N=32	Increased		Stayed the same		Decreased		NA
	#	%	#	%	#	%	
Last minute bookings	10	32%	11	36%	2	7%	26%
Walk-in patrons	10	32%	11	36%	4	13%	19%
Retail sales	5	17%	5	17%	3	10%	55%
Dining out	-	-	4	14%	1	3%	83%
Length of stay	10	32%	10	32%	2	7%	29%
Visitors seeking less expensive activities	10	35%	11	38%	1	3%	24%
# of Montanans traveling within the state	11	38%	13	45%	2	7%	10%

How high a priority is it for the Montana tourism industry to..... (n=32)	Very low priority	Some what low priority	Medium priority	Some what high priority	Very high priority	Mean
Help maintain Montana’s destination appeal	-	-	3%	19%	78%	4.75
Strive to hire local people	-	-	7%	39%	55%	4.48
Promote preservation of open space	3%	7%	24%	17%	48%	4.00
Help prevent overdevelopment if against community values	3%	10%	23%	19%	45%	3.94
Maintain the character of Montana	-	-	16%	19%	66%	4.50
Encourage all types of tourism development	-	10%	13%	32%	45%	4.13
Strive to reduce energy consumption	16%	10%	32%	16%	26%	3.26

*percents may not add to 100 due to rounding



Scale: 1=very low priority to 5=very high priority

Custer Country Summary

Tourism business owners in Custer Country experienced the highest percent of businesses with a decrease in 2010 (38%) compared to all the other travel regions, and are the least optimistic of all regions with 19 percent of business owners expecting a decrease in 2011. While the sample size for Custer Country is relatively small at 32 respondents, the data does show a trend of cautiousness and a little less hope than the rest of the state. Respondents stated that the U.S. economy is the number one reason for the decline to their area.

Custer Country tourism industry respondents indicated that helping maintain Montana’s destination appeal was the top priority of seven Montana tourism charter-related statements followed closely by maintaining the character of Montana. Like respondents from around the state, the statement, “strive to reduce energy consumption,” received the lowest priority rating by the Custer Country industry respondents.

Interestingly, while there is pessimism by some Custer Country respondents, no one is closing or downsizing, and 44 percent of them will either expand, renovate or add more sites elsewhere. Those who are optimistic are putting their efforts into better marketing and working with repeat customers to get them to return.

Russell Country and Missouri River Country

Average (mean) years business operated by current owners: 18.10

Average (mean) years of business operation at current location: 34.06

Range in years of operation by current owner: 1 – 100 years

Range in years of operation at current location: 2 – 108 years

Sample size: 33

Russell and Missouri River Countries

Russell Country respondents represent 8% (n=27) of all respondents to the outlook survey while Missouri River respondents represent 2% (n=6). Due to sample size, these two regions were combined in this analysis.

Type of Business	#	%
Motel/hotel	9	27%
Bed & Breakfast	3	9%
Ranches, resorts, lodges, hostels, hot springs	1	3%
Vacation homes, condos, cabins	2	6%
Public campgrounds	1	3%
Private campgrounds	2	6%
Outfitter/Guide	5	15%
Land management agency	-	-
Tours	1	3%
Travel planners	1	3%
Event planners	1	3%
Vehicle rentals	-	-
Ski area	-	-
Museum, historic site	-	-
Attraction	1	3%
Tourism promotion/advertising	5	15%
Other	1	3%

*percent may not add to 100 (rounding)

Change in visitors ('09 to '10)	#	%*
Increase	17	52%
Decrease	8	24%
Remained the same	8	24%

Reason for Increase in 2010 **	#	%*
Better marketing	8	47%
Improved website	6	35%
Expanded operations/services	-	-
Returning guests	12	71%
Little competition in my area	-	-
Affordability of what we offer	7	41%
U.S. economy	5	29%
Canadian exchange rate	8	47%
Other foreign exchange rates	-	-
More local travelers	6	35%
More regional travelers	8	47%
Special event(s) held in our area	5	29%
Weather	-	-
Fire activity	-	-
Lack of fires	1	6%
Other	5	29%

*respondents could check multiple answers **n=17

Reason for Decrease in 2010**	#
Less advertising on our part	-
Reduced offerings/services	1
Fewer returning guests	-
Increased competition in my area	-
Our pricing may be too high	1
U.S. economy	2
Gas prices	3
Exchange rates	-
Fewer local travelers	-
Fewer regional travelers	1
Fewer business travelers	1
Fewer leisure travelers	4
Changes in hunting/fishing licenses	3
Construction in area	1
Weather	3
Fire activity	-
Lack of fires	-
Other	-

*respondents could check multiple answers; **n=8

Outlook for 2011	#	%
Increase	17	53%
Decrease	3	9%
Remain the same	12	38%

Outlook for 2011	If had Increase in 2010 (n=17)		If had a Decrease in 2010 (n=8)	
	#	%	#	%
Increase	9	56%	3	38%
Decrease	1	6%	2	25%
Remain the same	6	38%	3	38%

Reason for Expected Increase in 2011 **	#	%*
Bookings/inquires are up	6	35%
More/better marketing pursued	5	29%
Improved website	6	35%
Experiencing a gradual increase	7	41%
Expanded or improved our offerings	4	24%
Affordability of what we offer	7	41%
Little competition in my area	1	6%
More local travelers	4	24%
More regional travelers	4	24%
We get many repeat customers	9	53%
Canadian exchange rate	4	24%
Other foreign exchange rates	1	6%
U.S. economy	4	24%
Special events in our area	7	41%
We are new, so we are increasing	2	12%
Other	2	12%

*respondents could check multiple answers
**n=17

Reason for Expected Decrease in 2011**	#
Bookings/inquires are down	1
We've done less marketing	-
Experiencing a gradual decrease	-
Reduced our offerings/services	-
Our pricing may be too high	-
Increased competition in my area	1
Expect fewer leisure travelers	1
Expect fewer business travelers	1
Expect fewer local travelers	-
Expect fewer regional travelers	1
Changes in hunting/fishing licenses	2
Gas prices	1
U.S. economy	1
Global economy	-
Other	-

*respondents could check multiple answers **n=3

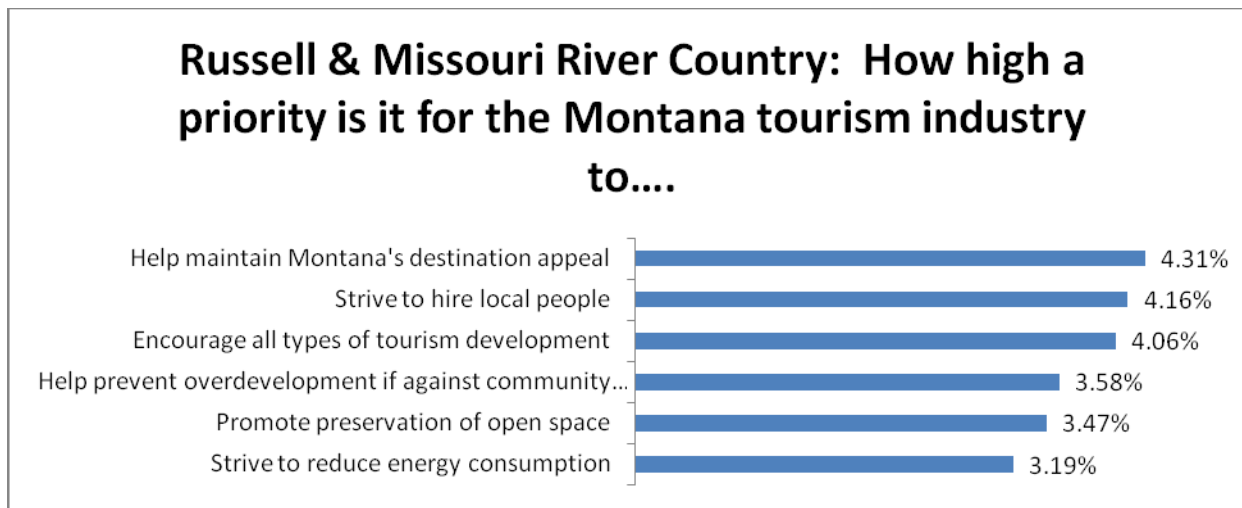
Plans for 2011**	#	%*
Expand current business or site	5	16%
Renovate current site	4	13%
Add more sites/business elsewhere	-	-
Downsize current business or site	-	-
Close down/sell business or site	2	7%
Remain the same	21	68%

*respondents could check multiple answers **n=33

What happened in regards to vacationers in 2010? N=33	Increased		Stayed the same		Decreased		NA
	#	%	#	%	#	%	
Last minute bookings	11	37%	10	33%	3	10%	20%
Walk-in patrons	13	41%	9	28%	3	9%	22%
Retail sales	3	10%	7	23%	3	10%	58%
Dining out	1	4%	4	14%	2	7%	75%
Length of stay	9	31%	14	48%	2	7%	14%
Visitors seeking less expensive activities	13	45%	7	24%	1	3%	28%
# of Montanans traveling within the state	13	45%	9	31%	1	3%	21%

How high a priority is it for the Montana tourism industry to..... (n=33)	Very low priority	Some what low priority	Medium priority	Some what high priority	Very high priority	Mean
Help maintain Montana’s destination appeal	3%	-	19%	19%	59%	4.31
Strive to hire local people	6%	-	19%	22%	53%	4.16
Promote preservation of open space	19%	6%	19%	22%	34%	3.47
Help prevent overdevelopment if against community values	16%	10%	16%	16%	42%	3.58
Maintain the character of Montana	6%	3%	6%	13%	72%	4.41
Encourage all types of tourism development	6%	9%	16%	9%	59%	4.06
Strive to reduce energy consumption	22%	6%	34%	6%	31%	3.19

*percents may not add to 100 due to rounding



Scale: 1=very low priority to 5=very high priority

Russell and Missouri River Country Summary

Russell and Missouri Country Tourism business owners experienced the second highest percent of businesses with a decrease in 2010 (24%) compared to all the other travel regions, but are much more optimistic about 2011. Only nine percent expect a decrease in 2011 while 38 percent expect an increase. Respondents stated that returning guests were the reason 2010 was good and expect repeat visitors to keep them afloat in 2011.

Russell and Missouri River Country tourism industry respondents indicated that helping maintain Montana’s destination appeal was the top priority of seven Montana tourism charter-related statements followed closely by maintaining the character of Montana. Like respondents from around the state, the statement, “strive to reduce energy consumption,” received the lowest priority rating by the Russell and Missouri River Country industry respondents. Interestingly, however, respondents in these two regions had the lowest overall ratings of all seven charter-related priorities compared to respondents elsewhere. While the order of priority is the same, these business owners appear to be less likely to whole-heartedly support the Montana Tourism Charter.

Motel/Hotel

Average (mean) years business operated by current owners: 12.18
 Average (mean) years of business operation at current location: 30.17
 Range in years of operation by current owner: 6 months – 63 years
 Range in years of operation at current location: 1 – 100 years
 Sample size: 71

Travel Region Location	#	%
Glacier Country	22	31%
Yellowstone Country	15	21%
Gold West Country	16	23%
Russell Country	9	13%
Custer Country	8	11%
Missouri River Country	-	-

Other businesses engaged in...	#	%
Motel/hotel	-	-
Bed & Breakfast	1	3%
Ranches, resorts, lodges, hostels, hot springs	2	7%
Vacation homes, condos, cabins	-	-
Public campgrounds	1	3%
Private campgrounds	2	7%
Outfitter/Guide	1	3%
Tours	3	10%
Travel planners	1	3%
Event planners	3	10%
Vehicle rentals	-	-
Ski area	1	3%
Museum, historic site	1	3%
Attraction	2	7%
Tourism promotion/advertising	2	7%
Other	1	3%

Change in visitors ('09 to '10)	#	%*
Increase	50	71%
Decrease	18	26%
Remained the same	2	3%

Reason for Increase in 2010 **	#	%*
Better marketing	32	71%
Improved website	13	26%
Expanded operations/services	3	6%
Returning guests	31	62%
Little competition in my area	3	6%
Affordability of what we offer	22	44%
U.S. economy	12	24%
Canadian exchange rate	6	24%
Other foreign exchange rates	-	-
More local travelers	7	14%
More regional travelers	26	52%
Special event(s) held in our area	18	36%
Weather	7	14%
Fire activity	-	-
Lack of fires	7	14%
Other	10	20%

*respondents could check multiple answers; **n=50

Reason for Decrease in 2010**	#	%*
Less advertising on our part	-	-
Reduced offerings/services	-	-
Fewer returning guests	4	22%
Increased competition in my area	4	22%
Our pricing may be too high	1	6%
U.S. economy	15	83%
Gas prices	7	39%
Exchange rates	-	-
Fewer local travelers	3	17%
Fewer regional travelers	5	28%
Fewer business travelers	8	44%
Fewer leisure travelers	14	78%
Changes in hunting/fishing licenses	3	17%
Construction in area	2	11%
Weather	4	22%
Fire activity	-	-
Lack of fires	-	-
Other	2	11%

*respondents could check multiple answers; **n=18

Outlook for 2011	#	%
Increase	32	48%
Decrease	9	13%
Remain the same	26	39%

Outlook for 2011	If had Increase in 2010 (n=50)		If had a decrease in 2010 (n=18)	
	#	%	#	%
Increase	25	52%	5	31%
Decrease	5	10%	4	25%
Remain the same	18	38%	7	44%

Reason for Expected Increase in 2011 **	#	%*
Bookings/inquires are up	16	50%
More/better marketing pursued	12	38%
Improved website	10	31%
Experiencing a gradual increase	19	59%
Expanded or improved our offerings	8	25%
Affordability of what we offer	15	47%
Little competition in my area	2	6%
More local travelers	7	22%
More regional travelers	11	34%
We get many repeat customers	24	75%
Canadian exchange rate	2	6%
Other foreign exchange rates	1	3%
U.S. economy	13	41%
Special events in our area	7	22%
We are new, so we are increasing	4	13%
Other	3	9%

*respondents could check multiple answers
**n=32

Reason for Expected Decrease in 2011**	#
Bookings/inquires are down	5
We've done less marketing	-
Experiencing a gradual decrease	-
Reduced our offerings/services	-
Our pricing may be too high	-
Increased competition in my area	2
Expect fewer leisure travelers	6
Expect fewer business travelers	4
Expect fewer local travelers	2
Expect fewer regional travelers	5
Changes in hunting/fishing licenses	3
Gas prices	3
U.S. economy	8
Global economy	3
Other	1

*respondents could check multiple answers **n=9

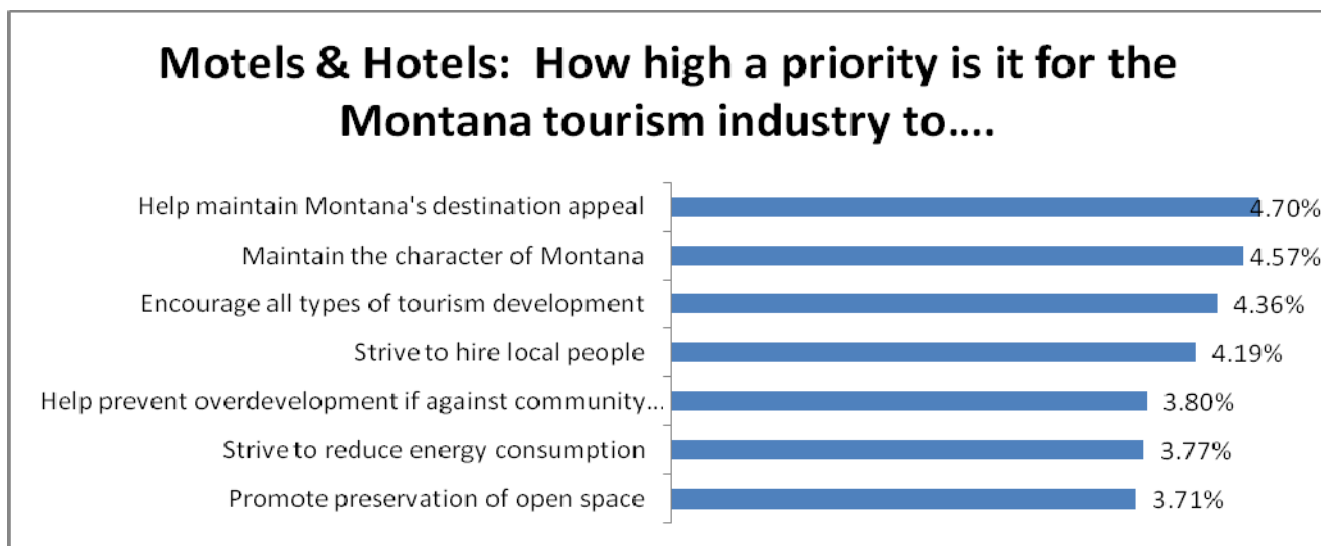
Plans for 2011**	#	%*
Expand current business or site	6	9%
Renovate current site	18	27%
Add more sites/business elsewhere	2	3%
Downsize current business or site	-	-
Close down/sell business or site	-	-
Remain the same	67	69%

*respondents could check multiple answers **n=71

What happened in regards to vacationers in 2010? N=71	Increased		Stayed the same		Decreased		NA
	#	%	#	%	#	%	
Last minute bookings	43	62%	18	26%	7	10%	1%
Walk-in patrons	41	58%	20	28%	9	13%	1%
Retail sales	12	20%	6	10%	5	9%	61%
Dining out	10	17%	8	13%	2	3%	67%
Length of stay	19	29%	32	49%	12	18%	5%
Visitors seeking less expensive activities	30	46%	21	32%	1	2%	20%
# of Montanans traveling within the state	29	43%	29	43%	6	9%	5%

How high a priority is it for the Montana tourism industry to..... (n=71)	Very low priority	Some what low priority	Medium priority	Some what high priority	Very high priority	Mean
Help maintain Montana’s destination appeal	1%	-	4%	16%	78%	4.70
Strive to hire local people	1%	6%	14%	30%	49%	4.19
Promote preservation of open space	7%	10%	22%	26%	35%	3.71
Help prevent overdevelopment if against community values	3%	15%	17%	30%	35%	3.80
Maintain the character of Montana	-	3%	6%	23%	68%	4.57
Encourage all types of tourism development	1%	7%	10%	17%	64%	4.36
Strive to reduce energy consumption	6%	12%	23%	19%	41%	3.77

*percents may not add to 100 due to rounding



Scale: 1=very low priority to 5=very high priority

Hotel/Motel Summary

The hotel/motel tourism business respondents had the highest percent who said they had an increase in 2010 compared to all other business sectors. Seventy-one percent experienced an increase compared to the next highest segment, ranches, resorts, lodges, hostels and hot springs, of which 69 percent had an increase. This increase in hotel/motel visitation was attributed to better marketing, more regional travelers, and returning guests. The 26 percent who said they had a decrease in 2010 were most likely to say the U.S. economy followed by fewer leisure travelers as the reason for their decline.

Differences do emerge when looking at the priority ratings of the seven tourism charter-related priorities by business sector. In the hotel/motel sector, while industry respondents indicated that helping maintain Montana’s destination appeal was the top priority followed closely by maintaining the character of Montana (as seen throughout the region responses), promoting preservation of open space was the lowest priority of all statements. Within the regions, “strive to reduce energy consumption was always the lowest priority. This is an interesting finding since the “Travelers for Open Lands” project is dependent on the accommodation sector, especially the motels, to promote donations by guests for setting aside conservation lands. “Travelers for Open Lands” will need to continue their education of motel managers as to the importance of open space in Montana for the tourism industry as a whole.

Hotel/Motel comment Section

Green/sustainable, facilities, events, etc. are becoming a factor in visitor decision making and a healthy percentage of tourism related business appear to be oblivious to this. As an example - many guests have commented that it can be difficult to recycle in Montana and were pleased to see we offered recycling at the property.

Just hoping the economy pickup /

THE LOSS OF BETSY BAUMGART IS A HUGE CONCERN TO THE FUTURE OF THE TOURISM INDUSTRY OF MONTANA AND WE WILL HAVE TO WORK HARD TO MAINTAIN TOURISM AS SHE DEVELOPED IDEAS AND PROGRAMS THAT WORKED FOR THIS STATE AND IT'S TOURISM RELATED INDUSTRIES.

keep the governor and his staff away from dipping into the accommodation tax , and not firing the good people in their position

You are asking to compare 2009 and 2010 and 2010 is not over yet, so it is very hard to compare the 2 years. Hunting is a large part of our business here in Philipsburg and rifle season is just to begin. I still have 3 months to decide what has happened in 2010 and why and you are asking for results and what will happen in 2011? I am confused. I can report that RV's are about the same as last year, up until Sept., rooms for hunters are up this year for opening week, we have had several building projects going on here in the area and I get more workers than tourists. I really cannot say what will happen next year as life in Philipsburg is not like being in a large city....every year brings something new. Thanks....

This economy is scary for Ma and Pa.

Guests still seem to be very price sensitive, many took advantage of our discount offers & less expensive weekday rates.

JOBS !

I feel that there is a plethora of duplicated subsidized tourist organizations, for example in Kalispell we have seven from the chamber to the city all doing more or less similar things. 2009 was a huge boost mainly because of the parks centennial not any bureau. Further effort should be directed towards the ordinary Joe by events such a horse racing and logger days etc and promoting the area as a whole.

Vacation Homes/Condos/Cabins

Average (mean) years business operated by current owners: 6.7

Average (mean) years of business operation at current location: 10.86

Range in years of operation by current owner: - – 47 years

Range in years of operation at current location: 1 – 112 years

Sample size: 92

Travel Region Location	#	%
Glacier Country	30	33%
Yellowstone Country	49	54%
Gold West Country	8	9%
Russell Country	1	1%
Custer Country	1	1%
Missouri River Country	1	1%

Other businesses engaged in...	#	%
Motel/hotel	2	6%
Bed & Breakfast	4	12%
Ranches, resorts, lodges, hostels, hot springs	11	32%
Vacation homes, condos, cabins	-	-
Public campgrounds	-	-
Private campgrounds	-	-
Outfitter/Guide	1	3%
Tours	-	-
Travel planners	1	3%
Event planners	4	12%
Vehicle rentals	-	-
Ski area	7	21%
Museum, historic site	-	-
Attraction	-	-
Tourism promotion/advertising	-	-
Other	1	3%

*percent may not add to 100 (rounding)

Change in visitors ('09 to '10)	#	%*
Increase	51	57%
Decrease	19	21%
Remained the same	20	22%

Reason for Increase in 2010 **	#	%*
Better marketing	25	51%
Improved website	13	26%
Expanded operations/services	6	12%
Returning guests	25	49%
Little competition in my area	3	6%
Affordability of what we offer	20	39%
U.S. economy	14	28%
Canadian exchange rate	2	4%
Other foreign exchange rates	1	2%
More local travelers	5	10%
More regional travelers	11	22%
Special event(s) held in our area	6	12%
Weather	2	4%
Fire activity	-	-
Lack of fires	8	15%
Other	7	14%

*respondents could check multiple answers **n=51

Reason for Decrease in 2010**	#	%*
Less advertising on our part	1	5%
Reduced offerings/services	-	-
Fewer returning guests	5	26%
Increased competition in my area	3	16%
Our pricing may be too high	1	5%
U.S. economy	-	-
Gas prices	7	37%
Exchange rates	-	-
Fewer local travelers	1	5%
Fewer regional travelers	2	11%
Fewer business travelers	-	-
Fewer leisure travelers	7	37%
Changes in hunting/fishing licenses	-	-
Construction in area	-	-
Weather	3	16%
Fire activity	-	-
Lack of fires	-	-
Other	2	11%

*respondents could check multiple answers; **n=19

Outlook for 2011	#	%
Increase	46	52%
Decrease	6	7%
Remain the same	37	42%

Outlook for 2011	If had Increase in 2010 (n=51)		If had a decrease in 2010 (n=19)	
	#	%	#	%
Increase	29	59%	8	42%
Decrease	1	2%	5	26%
Remain the same	19	39%	6	32%

Reason for Expected Increase in 2011 **	#	%*
Bookings/inquires are up	27	59%
More/better marketing pursued	14	30%
Improved website	10	22%
Experiencing a gradual increase	20	44%
Expanded or improved our offerings	7	15%
Affordability of what we offer	15	33%
Little competition in my area	5	11%
More local travelers	3	7%
More regional travelers	6	13%
We get many repeat customers	13	28%
Canadian exchange rate	1	2%
Other foreign exchange rates	1	2%
U.S. economy	15	33%
Special events in our area	5	11%
We are new, so we are increasing	11	24%
Other	3	7%

*respondents could check multiple answers
**n=46

Reason for Expected Decrease in 2011**	#
Bookings/inquires are down	4
We've done less marketing	1
Experiencing a gradual decrease	-
Reduced our offerings/services	1
Our pricing may be too high	-
Increased competition in my area	1
Expect fewer leisure travelers	4
Expect fewer business travelers	-
Expect fewer local travelers	1
Expect fewer regional travelers	3
Changes in hunting/fishing licenses	-
Gas prices	2
U.S. economy	4
Global economy	-
Other	1

*respondents could check multiple answers **n=6

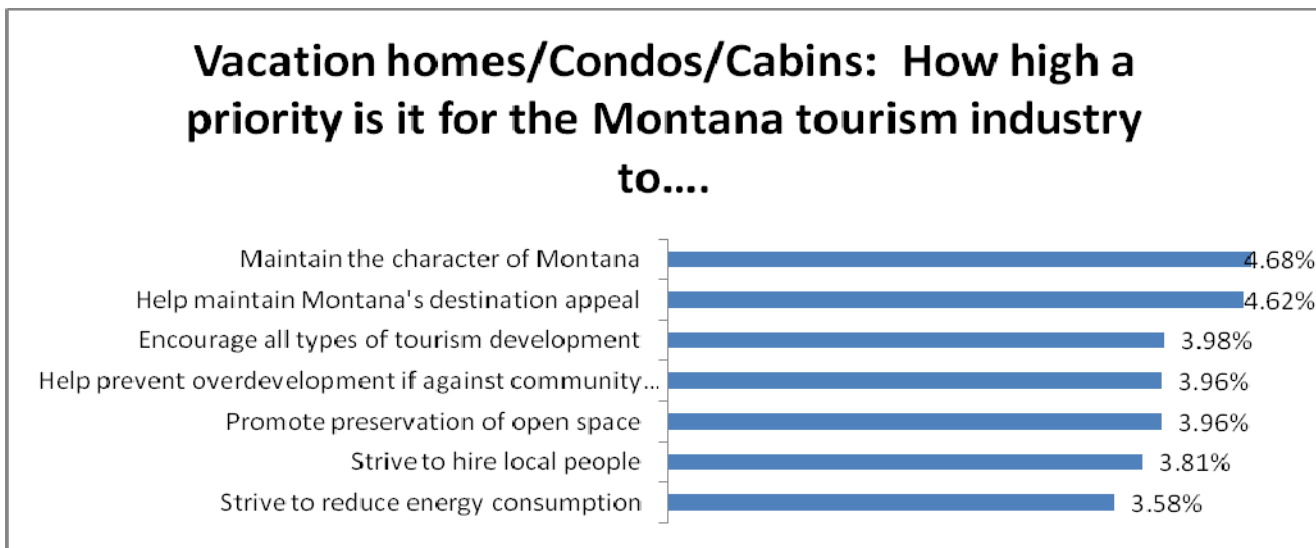
Plans for 2011**	#	%*
Expand current business or site	11	12%
Renovate current site	9	10%
Add more sites/business elsewhere	4	4%
Downsize current business or site	1	1%
Close down/sell business or site	3	3%
Remain the same	64	70%

*respondents could check multiple answers **n=91

What happened in regards to vacationers in 2010? N=91	Increased		Stayed the same		Decreased		NA
	#	%	#	%	#	%	
Last minute bookings	35	40%	35	40%	7	8%	12%
Walk-in patrons	8	10%	13	16%	3	4%	71%
Retail sales	4	5%	4	5%	3	4%	86%
Dining out	1	1%	5	7%	1	1%	91%
Length of stay	21	26%	39	48%	14	17%	-
Visitors seeking less expensive activities	29	37%	28	35%	1	1%	27%
# of Montanans traveling within the state	16	20%	38	46%	11	13%	21%

How high a priority is it for the Montana tourism industry to..... (n=91)	Very low priority	Some what low priority	Medium priority	Some what high priority	Very high priority	Mean
Help maintain Montana’s destination appeal	-	3%	3%	21%	72%	4.62
Strive to hire local people	11%	6%	17%	24%	43%	3.81
Promote preservation of open space	7%	4%	22%	20%	47%	3.96
Help prevent overdevelopment if against community values	8%	7%	16%	22%	48%	3.96
Maintain the character of Montana	1%	-	6%	17%	77%	4.68
Encourage all types of tourism development	4%	8%	19%	23%	46%	3.98
Strive to reduce energy consumption	6%	11%	31%	24%	28%	3.58

*percents may not add to 100 due to rounding



Scale: 1=very low priority to 5=very high priority

Vacation Homes/Condos/Cabins Summary

The rental sector of vacation homes, condos and cabins usually represents more extended stays of up to a week or more. Just over half (57%) of the respondents in this tourism business sector had an increase in 2010 but 21 percent had a decrease. Only the outfitter/guide sector had more respondents with a decrease compared to the other businesses in tourism. These rental homes/condos/cabins indicated that fewer leisure travelers and gas prices were the reason for their decrease but those with an increase said the returning guests and affordability helped increase their visitation in 2010. Almost half of this sector expects 2011 to remain the same in terms of number of guests (42%), but 52 percent expect an increase based on bookings and inquiries.

Owners of vacation homes, condos and rental cabins indicated that maintaining the character of Montana, followed by helping maintain Montana’s destination appeal, were the top two priorities of seven Montana tourism charter-related statements. This was the only industry segment that placed “maintaining the character of Montana” as the top priority. All other sectors placed the destination appeal at the top. While the difference is small, it may indicate that these business owners feel maintaining the character of Montana will ultimately help maintain Montana’s destination appeal and hence should be the top priority.

Vacation homes, Condos, Cabins Comment Section

I never get any inquiries from your site

We are unique in that we do not need guests to support the costs of our vacation rental. We would rather be selective and know that our guests will respect our property as they use it. It is a win win situation because they stay for less and we don't need to worry about depreciation or damage. We appreciate what you are doing for Montana tourism, but we don't want more exposure to attract more guests to our vacation rental. For us, the quantity and quality of our guests is satisfactory.

I wonder, in your questionnaires that are sent to visitors to Montana, do you include outdoor activities as possibilities of why they came to Montana? My vacation property is near a popular fishing and boating destination in Bighorn County and I never see those numbers on your summaries. Also, how do you decide who gets sent those questionnaires? I would be willing to ask my guests if they would be willing to participate. Thanks, the information you provide is helpful and I appreciate it. B.T.

last year was only a LITTLE better than the year before, certainly not as good as previous years before the economy tanked

The marketing for the Glacier Park 100 year celebration was wonderful! It brought us lots of last minute reservations, especially those people with PETS, as we are a pet friendly resort!!

I co-own two vacation cabin rentals in Paradise Valley, which are usually rented by the week(although 3 night stays are available out of season). Booking the summer months is fairly easy. We're a little too far from ski hills to get that business in the winter. However, we get elk, deer, bobcats, wolves, etc on the property in the off season, and are only 30 miles from YNP. October, April, and early May have wonderful weather in general, yet are traditionally slow. What kind of marketing could increase bookings October to May.

We are raising our rates for next year and we have not done that since 2008. Our advertising and recommendations have really helped us this year. For what we offer we are very reasonable - hopefully we can add a bit to the rates without discouraging our base.

WE need to cater more to businesses and get more in Montana. We have no really BIG businesses here. Our business taxes are too high and it scares them away . We need to create more jobs and businesses to get more tourists to want to come here. And want to shop in our tax free businesses.

Would encourage YNP to plow the roads for all types of people to be able to enjoy the park.

Tourism is doing great and we are looking forward to a much stronger 2011.

There should be a reduction of state tax on these rental properties

Thanks for all the good work done by ITRR staff.

We have a vacation Rental, and we saw fewer inquiries and bookings this last year as compared to 2009. I believe the poor US economy is the major factor in the fewer bookings.

We have a fully equipped house that will handle six persons. We are not finding people who want to stay for a week or two. We are really not interested in renting it for one night.

I think that there needs to be more information about Paradise Valley in ads for Yellowstone.

I'm optimistic for the coming year, although it really is a tough call regarding the economic outlook for 2011.

I am very concerned about the economy and cost of gas. Our people seem to be staying longer and traveling from closer. Much fewer are flying from out of state. Most business is from the North West. We are in the very southern part of Glacier Country, and that is not much help to us.

have a more effective visitmt.com sight. Locate properties/services on web site by having a map showing cities and letting people click on city. Not sure how to do this... give/help travelers have more educational/learning opportunities...maybe fund state parks/national parks better so that they could interact w/ public more...fireside chats... Thanks for your effort.

The overall view of Montana as a resort and vacation destination is increasing. The visitors that have not been here are in awe, the ones that know about it will always want to return, and do so.

I see many ads on TV or on the internet for "visit Mt" with photos of cowboys, beautiful landscaping, etc. which is great for us. Haven't seen any with photos of Yellowstone or suggesting "visit Yellowstone." Many visitors are from Atlanta, Georgia (direct flights to Bzm) so might be great place to publish ads.

We are grateful that bookings have steadily increased and hope that the economy can maintain where it is at or improve.

I do believe we have a long way still to go in promoting vacation rental homes. People still do not think to rent a home vs Hotel rooms.

Ranches, Resorts, Lodges, Hostels & Hot Springs

Average (mean) years business operated by current owners: 13.70

Average (mean) of business operation at current location: 29.40

Range in years of operation by current owner: 1 – 65 years

Range in years of operation at current location: 1 – 104 years

Sample size: 36

Travel Region Location	#	%
Glacier Country	15	44%
Yellowstone Country	9	27%
Gold West Country	8	24%
Russell Country	-	-
Custer Country	1	3%
Missouri River Country	1	3%

Other businesses engaged in...	#	%
Motel/hotel	8	32%
Bed & Breakfast	1	4%
Ranches, resorts, lodges, hostels, hot springs	-	-
Vacation homes, condos, cabins	8	32%
Public campgrounds	2	8%
Private campgrounds	2	8%
Outfitter/Guide	6	24%
Tours	1	4%
Travel planners	1	4%
Event planners	3	12%
Vehicle rentals	1	4%
Ski area	3	12%
Museum, historic site	1	4%
Attraction	2	8%
Tourism promotion/advertising	11	31%
Other	1	4%

*percent may not add to 100 (rounding)

Change in visitors ('09 to '10)	#	%*
Increase	24	69%
Decrease	10	29%
Remained the same	1	3%

Reason for Increase in 2010 **	#	%*
Better marketing	12	50%
Improved website	9	38%
Expanded operations/services	3	13%
Returning guests	17	71%
Little competition in my area	5	21%
Affordability of what we offer	8	33%
U.S. economy	12	50%
Canadian exchange rate	2	8%
Other foreign exchange rates	2	8%
More local travelers	-	-
More regional travelers	7	29%
Special event(s) held in our area	3	13%
Weather	2	8%
Fire activity	-	-
Lack of fires	5	21%
Other	3	13%

*respondents could check multiple answers **n=24

Reason for Decrease in 2010**	#
Less advertising on our part	3
Reduced offerings/services	-
Fewer returning guests	4
Increased competition in my area	-
Our pricing may be too high	-
U.S. economy	9
Gas prices	2
Exchange rates	-
Fewer local travelers	1
Fewer regional travelers	2
Fewer business travelers	3
Fewer leisure travelers	2
Changes in hunting/fishing licenses	1
Construction in area	-
Weather	4
Fire activity	-
Lack of fires	-
Other	-

*respondents could check multiple answers; **n=10

Outlook for 2011	#	%
Increase	18	53%
Decrease	-	-
Remain the same	16	47%

Outlook for 2011	If had Increase in 2010 (n=24)		If had a decrease in 2010 (n=10)	
	#	%	#	%
Increase	13	57%	4	44%
Decrease	-	-	-	-
Remain the same	10	44%	5	56%

Reason for Expected Increase in 2011 **	#	%*
Bookings/inquires are up	12	67%
More/better marketing pursued	10	56%
Improved website	6	33%
Experiencing a gradual increase	7	39%
Expanded or improved our offerings	8	44%
Affordability of what we offer	6	33%
Little competition in my area	2	11%
More local travelers	-	-
More regional travelers	4	22%
We get many repeat customers	10	56%
Canadian exchange rate	2	11%
Other foreign exchange rates	1	6%
U.S. economy	9	50%
Special events in our area	2	11%
We are new, so we are increasing	5	28%
Other	1	6%

*respondents could check multiple answers
 **n=18

Reason for Expected Decrease in 2011**

No respondents said they expect a decrease in 2011.

*respondents could check multiple answers **n=34

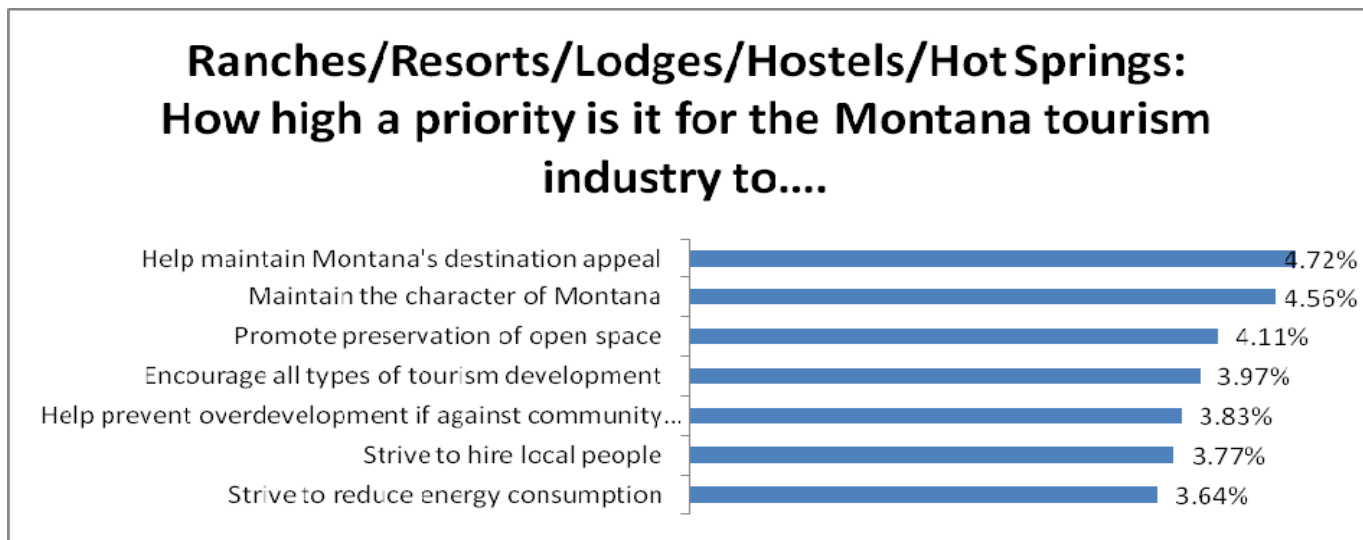
Plans for 2011**	#	%*
Expand current business or site	8	23%
Renovate current site	7	20%
Add more sites/business elsewhere	1	3%
Downsize current business or site	-	-
Close down/sell business or site	1	3%
Remain the same	19	54%

*respondents could check multiple answers **n=36

What happened in regards to vacationers in 2010? N=36	Increased		Stayed the same		Decreased		NA
	#	%	#	%	#	%	
Last minute bookings	19	54%	9	26%	4	11%	9%
Walk-in patrons	10	28%	8	22%	2	6%	49%
Retail sales	9	26%	7	20%	2	6%	49%
Dining out	7	20%	5	14%	1	3%	63%
Length of stay	7	21%	17	50%	7	21%	9%
Visitors seeking less expensive activities	15	43%	10	29%	3	9%	20%
# of Montanans traveling within the state	9	25%	14	39%	5	14%	22%

How high a priority is it for the Montana tourism industry to..... (n=36)	Very low priority	Some-what low priority	Medium priority	Some-what high priority	Very high priority	Mean
Help maintain Montana’s destination appeal	3%	-	3%	11%	83%	4.72
strive to hire local people	6%	-	37%	26%	31%	3.77
Promote preservation of open space	3%	8%	19%	14%	56%	4.11
Help prevent overdevelopment if against community values	6%	6%	28%	22%	39%	3.83
Maintain the character of Montana	3%	3%	6%	14%	75%	4.56
Encourage all types of tourism development	6%	3%	22%	28%	42%	3.97
Strive to reduce energy consumption	11%	-	31%	31%	28%	3.64

*percents may not add to 100 due to rounding



Scale: 1=very low priority to 5=very high priority

Ranches, Resorts, Lodges, Hostels & Hot Springs Summary

The vast majority (69%) of business owners in the ranches, resorts, lodges, hostels and hot springs tourism sector had an increase in visitation in 2010. Returning guests and better marketing were the reasons attributed for their increase. The U.S. economy was the number one reason stated for the 29 percent of these business owners who experienced a decrease. Interestingly, not a single business owner in this sector believes they will have a decrease in visitation in 2011 (53% expect an increase and 47% expect it to remain the same).

Ranches, resorts, lodges, hostels and hot springs business owners indicated that helping maintain Montana’s destination appeal was the top priority of seven Montana tourism charter-related statements followed by maintaining the character of Montana. The statement, “strive to reduce energy consumption,” received the lowest priority rating by owners in this business sector.

Forty-six percent of ranches, resorts, lodges, hostels and hot springs respondents said they will expand their current business, renovate their business, or add more sites elsewhere in 2011. The majority (54%) indicate they will remain the same in 2011 with no additions and no plans to reduce services. With no respondents in this business sector anticipating a decrease, ranches, resorts, lodges, hostels and hot springs owners are hopeful for 2011 and certainly not giving up because of a few down years.

Ranches, Resorts, Lodges Comment Section

It is critical that we maintain the multiple use process of our state. Too many special interest groups are targeting snowmobiling, four wheeling, etc as endangering the environment. We have had a decrease in our winter bookings from states like Wisconsin, Minnesota etc because they have heard about us not allowing grooming of trails. Judge Molloy is totally out of touch with reality and is too far into the environmentalists camp.

The economy is killing small business like ours who don't deal with high end spenders. The present federal administration is crushing the middle class which is our main business clients. They have no extra money to spend on vacations or quick getaways. Our number of family reunions is down tremendous because family members can't afford the cost to trail from their home to Montana. Prior to the fuel cost increase and the economy we averaged 5-8 family reunions, this last year one!

On our wish list: 1. Lower airline prices 2. Better representation of Dude Ranches in state travel information. And a better system on the state site for the traveler to find what they want. 3. Let's work together.

It is important that the State of Montana promote the benefits of the outfitting industry and the trickle-down effect it has to the local communities in the state. Outfitting has always been under attack in the state but speaking as an outfitter, we need the support of the State of Montana to do business on a level playing field which in turn will benefit the state.

Tourists within a five hour drive time are my best customers.

We felt the marketing done in conjunction with the Glacier Park Centennial was very beneficial for our business and the other businesses in Whitefish.

With the economy as bad as it is, I think it would be profitable to encourage Montanans to travel and visit destinations within our own state.

We should increase our train routes more track and affordable for vacationers to travel by train. Amtrak. A spur from the northern line to Bozeman.

We are optimistic for 2011!!

I was glad to see recognition that development that impacts our natural resources and is contrary to our community values is on your radar because our "niche" with our open space, wildlife, fisheries is like nowhere else in the lower 48. It is high time that land use planning becomes this state's focus.

Outfitter/Guide

Average (mean) years business operated by current owners: 17.06
 Average (mean) years of business operation at current location: 24.42
 Range in years of operation by current owner: 2 – 39 years
 Range in years of operation at current location: 2 – 108 years
 Sample size: 34

Travel Region Location	#	%
Glacier Country	7	21%
Yellowstone Country	10	29%
Gold West Country	7	21%
Russell Country	4	12%
Custer Country	5	15%
Missouri River Country	1	3%

Other businesses engaged in...	#	%
Motel/hotel	1	4%
Bed & Breakfast	1	4%
Ranches, resorts, lodges, hostels, hot springs	5	22%
Vacation homes, condos, cabins	1	4%
Public campgrounds	-	-
Private campgrounds	-	-
Outfitter/Guide	-	-
Wagon train/cattle drives	2	9%
Tours	8	35%
Travel planners	-	-
Event planners	-	-
Vehicle rentals	-	-
Ski area	-	-
Museum, historic site	-	-
Attraction	--	--
Tourism promotion/advertising	-	-
Other	1	4%

*percent may not add to 100 (rounding)

Change in visitors ('09 to'10)	#	%*
Increase	16	47%
Decrease	12	35%
Remained the same	6	18%

Reason for Increase in 2010 **	#	%*
Better marketing	9	56%
Improved website	6	38%
Expanded operations/services	4	25%
Returning guests	7	44%
Little competition in my area	1	6%
Affordability of what we offer	3	19%
U.S. economy	4	25%
Canadian exchange rate	-	-
Other foreign exchange rates	-	-
More local travelers	2	13%
More regional travelers	3	19%
Special event(s) held in our area	-	-
Weather	3	19%
Fire activity	-	-
Lack of fires	3	19%
Other	1	6%

*respondents could check multiple answers **n=16

Reason for Decrease in 2010**	#	%*
Less advertising on our part	-	-
Reduced offerings/services	-	-
Fewer returning guests	4	33%
Increased competition in my area	1	8%
Our pricing may be too high	-	-
U.S. economy	10	83%
Gas prices	1	8%
Exchange rates	-	-
Fewer local travelers	-	-
Fewer regional travelers	1	8%
Fewer business travelers	-	-
Fewer leisure travelers	3	25%
Changes in hunting/fishing licenses	3	25%
Construction in area	-	-
Weather	1	8%
Fire activity	-	-
Lack of fires	-	-
Other	1	8%

*respondents could check multiple answers; **n=12

Outlook for 2011	#	%
Increase	14	42%
Decrease	8	24%
Remain the same	11	33%

Outlook for 2011	If had Increase in 2010 (n=16)		If had a decrease in 2010 (n=12)	
	#	%	#	%
Increase	10	67%	2	17%
Decrease	1	7%	6	50%
Remain the same	4	27%	4	33%

Reason for Expected Increase in 2011 **	#	%*
Bookings/inquires are up	7	50%
More/better marketing pursued	7	50%
Improved website	7	50%
Experiencing a gradual increase	7	50%
Expanded or improved our offerings	3	21%
Affordability of what we offer	5	36%
Little competition in my area	2	14%
More local travelers	1	7%
More regional travelers	1	7%
We get many repeat customers	9	64%
Canadian exchange rate	-	-
Other foreign exchange rates	-	-
U.S. economy	6	43%
Special events in our area	-	-
We are new, so we are increasing	2	14%
Other	-	-

*respondents could check multiple answers
**n=14

Reason for Expected Decrease in 2011**	#
Bookings/inquires are down	4
We've done less marketing	-
Experiencing a gradual decrease	-
Reduced our offerings/services	-
Our pricing may be too high	-
Increased competition in my area	-
Expect fewer leisure travelers	1
Expect fewer business travelers	-
Expect fewer local travelers	-
Expect fewer regional travelers	-
Changes in hunting/fishing licenses	5
Gas prices	1
U.S. economy	5
Global economy	2
Other	2

*respondents could check multiple answers **n=8

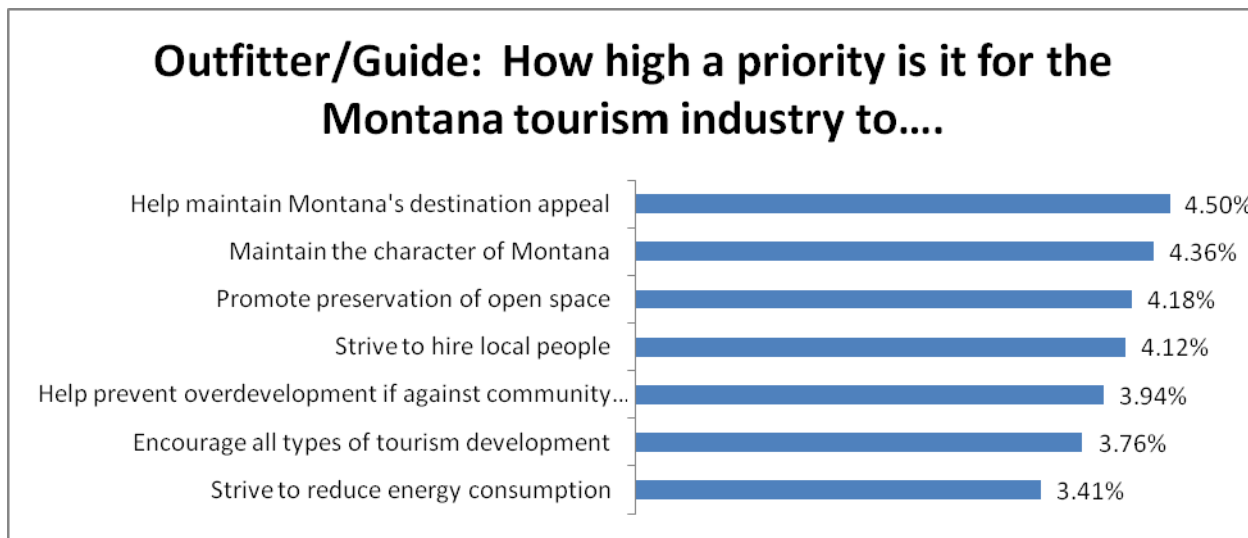
Plans for 2011**	#	%*
Expand current business or site	7	22%
Renovate current site	2	6%
Add more sites/business elsewhere	2	6%
Downsize current business or site	2	6%
Close down/sell business or site	-	-
Remain the same	20	63%

*respondents could check multiple answers **n=34

What happened in regards to vacationers in 2010? N=34	Increased		Stayed the same		Decreased		NA
	#	%	#	%	#	%	
Last minute bookings	13	39%	13	39%	5	15%	6%
Walk-in patrons	3	10%	14	45%	4	13%	32%
Retail sales	4	14%	7	24%	2	7%	55%
Dining out	1	4%	3	11%	2	7%	79%
Length of stay	5	17%	11	37%	6	20%	27%
Visitors seeking less expensive activities	16	55%	5	17%	2	7%	21%
# of Montanans traveling within the state	7	24%	14	48%	1	3%	24%

How high a priority is it for the Montana tourism industry to..... (n=34)	Very low priority	Some-what low priority	Medium priority	Some-what high priority	Very high priority	Mean
Help maintain Montana’s destination appeal	-	-	12%	27%	62%	4.50
Strive to hire local people	3%	-	29%	18%	50%	4.12
Promote preservation of open space	3%	6%	15%	24%	53%	4.18
Help prevent overdevelopment if against community values	9%	12%	9%	18%	53%	3.94
Maintain the character of Montana	3%	-	15%	21%	61%	4.36
Encourage all types of tourism development	-	6%	41%	24%	29%	3.76
Strive to reduce energy consumption	12%	6%	35%	24%	24%	3.41

*percents may not add to 100 due to rounding



Scale: 1=very low priority to 5=very high priority

Outfitter/Guide Summary

Montana outfitter and guide respondents experienced the highest number of their businesses with a decrease in 2010 (35%) compared to all other tourism businesses. The U.S. Economy was the main reason stated for the decrease in visitation. Of the 47 percent who experienced an increase in 2010, better marketing and returning guests was what brought visitors to their business. It appears to be a mixed review as to what will happen in 2011. While the most respondents (42%) believe 2011 will be better, one quarter of the respondent believe they will have a decrease and 33 percent think 2011 will remain the same as in 2010.

Outfitter and guide tourism industry respondents indicated that helping maintain Montana’s destination appeal was the top priority of seven Montana tourism charter-related statements followed closely by maintaining the character of Montana. The statement, “strive to reduce energy consumption,” received the lowest priority rating by outfitter and guide respondents.

Fifty-five percent of outfitter and guide respondents said vacationers were seeking less expensive activities. With guided trips being a more expensive activity, it is not surprising that this business segment experienced decreases and is uncertain as to what 2011 will bring.

Outfitter/Guide Comment Section

Part of the draw to Montana is the outdoor experience is different than any place else. This is because we stay closer to our Montana freedoms, morals and ethics. If we strive to be like California or Colorado we will lose not just our identity but what makes us unique and great. We need to maintain the small town attitude and the western values.

Montana is sending out the message loud and clear that non-resident hunters are not welcome.

Thank you, that was pretty easy. Love all the work that you do. It is very interesting and helpful.

Initiative 161 is a direct assault on my business and livelihood here in Montana. Apparently my efforts and those of my fellow Outfitters and guides are not to be rewarded. I wish ITR would speak out on behalf of this \$200 million hunting industry in Montana to defend it from elimination.

This information in this survey is very helpful, and cannot wait to hear the results.

None

Give us some of the bed tax money back, in the form of community improvement and real help with marketing so we can improve our image. The state tourism bureau does a poor job in every way. Don't stop now! clean house from the bottom up. dump the stupid tourism region farce. For the most part, the board members in our region have little or nothing to do with tourism directly. Russell Country, what does it mean to anybody? Our bed tax goes to on-the-job-training for entry level ad grads at Wendt, and our so called travel planner proves it. We do just fine without any help from Mt tourism and that's fine by us, I just hate to see Ft. Benton wither for lack of funding, while do-nothing bureaucrats watch the money go back to the general fund. Call me sour grapes, this company has done very well for a very long time in spite of Mt. Tourism.

We are very concerned that, if I 161 passes, many non-guided nonresident big game hunters will perceive that Montana is price gouging, and will decide to hunt elsewhere. This will be a big economic blow.

I couldn't help but notice the lack of a North Central or North East Montana Seminar location such as Havre or Glasgow

I think we need to manage the wolves in Montana before it's the ELK that makes the endangered species list. People that come here to visit want to see all of the animals and habitats.

Tourism Promotion Organizations/Advertising Companies

Average (mean) years business operated by current owners: 12.43

Average (mean) years of business operation at current location: 30.27

Range in years of operation by current owner: 1 – 100 years

Range in years of operation at current location: 1 – 103 years

Sample size: 34

Travel Region Locations	#	%
Glacier Country	6	18%
Yellowstone Country	9	27%
Gold West Country	9	27%
Russell Country	4	12%
Custer Country	5	15%
Missouri River Country	1	3%

Type of Business	#	%
Motel/hotel	-	-
Bed & Breakfast	1	4%
Ranches, resorts, lodges, hostels, hot springs	-	-
Vacation homes, condos, cabins	1	4%
Public campgrounds	1	4%
Private campgrounds	1	4%
Outfitter/Guide	-	-
Tours	3	12%
Travel planners	7	28%
Event planners	1	4%
Vehicle rentals	-	-
Ski area	1	4%
Museum, historic site	2	8%
Attraction	2	8%
Tourism promotion/advertising	-	-
Other	5	20%

*percent may not add to 100 (rounding)

Change in visitors ('09 to '10)	#	%*
Increase	21	66%
Decrease	5	16%
Remained the same	6	19%

Reason for Increase in 2010 **	#	%*
Better marketing	12	57%
Improved website	11	52%
Expanded operations/services	3	14%
Returning guests	7	33%
Little competition in my area	-	-
Affordability of what we offer	4	19%
U.S. economy	8	38%
Canadian exchange rate	2	10%
Other foreign exchange rates	1	5%
More local travelers	8	38%
More regional travelers	15	71%
Special event(s) held in our area	9	43%
Weather	1	5%
Fire activity	-	-
Lack of fires	5	24%
Other	3	14%

*respondents could check multiple answers **n=21

Reason for Decrease in 2010**	#
Less advertising on our part	-
Reduced offerings/services	-
Fewer returning guests	-
Increased competition in my area	-
Our pricing may be too high	-
U.S. economy	4
Gas prices	2
Exchange rates	-
Fewer local travelers	-
Fewer regional travelers	2
Fewer business travelers	-
Fewer leisure travelers	1
Changes in hunting/fishing licenses	-
Construction in area	-
Weather	1
Fire activity	-
Lack of fires	-
Other	-

*respondents could check multiple answers; **n=5

Outlook for 2011	#	%
Increase	22	73%
Decrease	-	-
Remain the same	8	27%

Outlook for 2011	If had Increase in 2010 (n=20)		If had a decrease in 2010 (n=4)	
	#	%	#	%
Increase	15	75%	3	75%
Decrease	-	-	-	-
Remain the same	5	25%	1	25%

Reason for Expected Increase in 2011 **	#	%*
Bookings/inquires are up	5	23%
More/better marketing pursued	13	59%
Improved website	11	50%
Experiencing a gradual increase	7	32%
Expanded or improved our offerings	4	18%
Affordability of what we offer	6	27%
Little competition in my area	-	-
More local travelers	5	23%
More regional travelers	10	46%
We get many repeat customers	11	50%
Canadian exchange rate	3	14%
Other foreign exchange rates	2	9%
U.S. economy	7	32%
Special events in our area	9	41%
We are new, so we are increasing	-	-
Other	1	5%

*respondents could check multiple answers
**n=22

Reason for Expected Decrease in 2011**

No respondents expect a decrease in 2011.

*respondents could check multiple answers **n=8

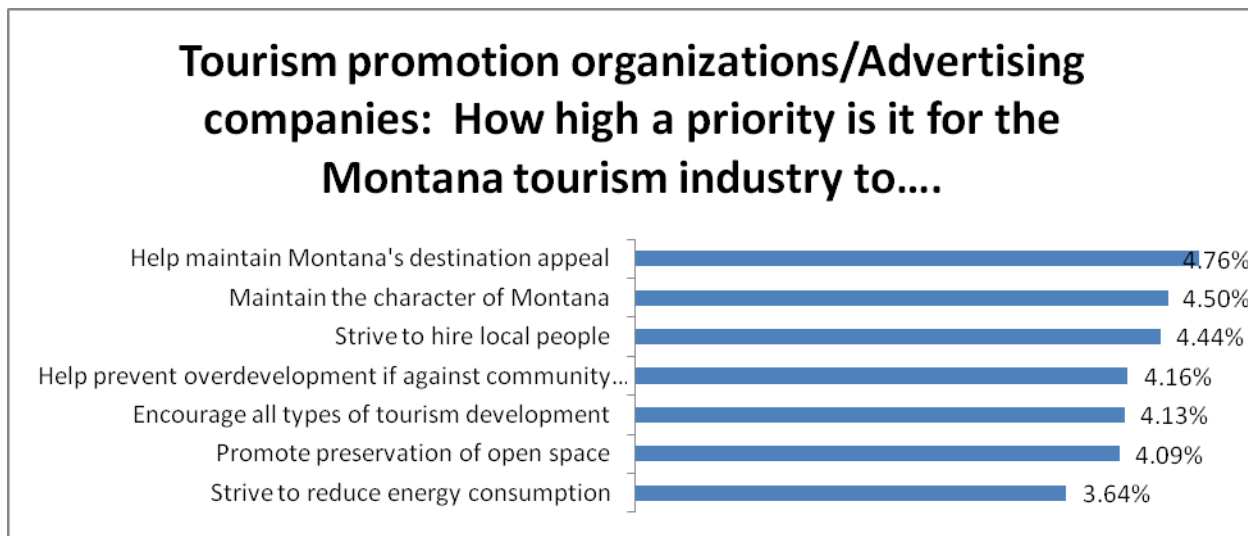
Plans for 2011**	#	%*
Expand current business or site	4	14%
Renovate current site	4	14%
Add more sites/business elsewhere	2	7%
Downsize current business or site	-	-
Close down/sell business or site	-	-
Remain the same	22	79%

*respondents could check multiple answers **n=34

What happened in regards to vacationers in 2010? n=34	Increased		Stayed the same		Decreased		NA
	#	%	#	%	#	%	
Last minute bookings	6	22%	2	7%	-	-	70%
Walk-in patrons	11	37%	5	17%	3	10%	37%
Retail sales	2	7%	3	10%	3	10%	72%
Dining out	-	-	4	15%	2	8%	77%
Length of stay	6	21%	4	14%	2	7%	57%
Visitors seeking less expensive activities	15	52%	4	14%	-	-	35%
# of Montanans traveling within the state	15	56%	4	15%	1	4%	26%

How high a priority is it for the Montana tourism industry to..... (n=34)	Very low priority	Some-what low priority	Medium priority	Some-what high priority	Very high priority	Mean
Help maintain Montana's destination appeal	-	-	-	24%	77%	4.76
Strive to hire local people	3%	-	3%	38%	56%	4.44
Promote preservation of open space	-	6%	18%	36%	39%	4.09
Help prevent overdevelopment if against community values	-	3%	26%	23%	48%	4.16
Maintain the character of Montana	3%	3%	9%	12%	74%	4.50
Encourage all types of tourism development	3%	7%	16%	23%	52%	4.13
Strive to reduce energy consumption	6%	15%	24%	18%	36%	3.64

*percentages may not add to 100 due to rounding



Scale: 1=very low priority to 5=very high priority

Tourism Promotion Organizations/Advertising Companies Summary

The tourism promotion organizations and advertising companies represent an interesting tourism business group. The organizations can represent convention and visitor bureaus, chambers of commerce, and visitor centers who do not host visitors, but certainly do interact with them. The advertising companies represent these organizations or private tourism businesses. Interestingly, 66 percent of this group indicated an increase in 2010 and only 16 percent said there was a decrease. More regional travelers, better marketing and improved websites were credited with the increases.

Respondents in the tourism promotion organizations and advertising companies indicated that helping maintain Montana's destination appeal was the top priority of seven Montana tourism charter-related statements. This group rated this priority higher than all the other tourism businesses in the survey.

Seventy-three percent of tourism promotion organizations and advertising company respondents said that they expect an increase in 2011, and none of them expect a decrease, showing a very positive outlook for 2011.

Tourism Promotion Organizations/Advertising Company Comment Section

State Department of Commerce needs to work with Tribes and support endeavors.

Until the job picture improves in larger metro areas, individual travel budgets will feel pressure. Groups of families are pooling transportation, lodging and dining resources more than ever, and trying to cram as many experiences into a shorter amount of time. This may eventually affect their perception about the 'quality' of this experience.

International visitation has affected north central Montana, both from Canada and abroad. Since the US Dollar has not been strong, we are a bargain for international visitors.

Please help us to keep promoting Montana and all of the jewels it has to offer-the entire state! Please don't discourage travelers by scaring them with construction on the Beartooth pass or nearby roadways-we need their business! Please encourage other entities to do the same for each other. Sometimes the construction is only a 10 minute delay but the way it is communicated; people will avoid it at all costs. thank you for conducting this survey!

None.

As long as the US economy "appears" stable, vacationers will come out. But they've been vacationing on the cheap by camping instead of moteling, by buy groceries & fast food instead of eating at restaurants, and by reducing or eliminating retail merchandise purchases.

Bed and Breakfast

Average (mean) years business operated by current owners: 9.94
 Average (mean) years of business operation at current location: 13.29
 Range in years of operation by current owner: 1 – 23 years
 Range in years of operation at current location: 1 – 62 years
 Sample size: 28

Travel Region Location	#	%
Glacier Country	17	61%
Yellowstone Country	1	4%
Gold West Country	4	14%
Russell Country	2	7%
Custer Country	3	11%
Missouri River Country	1	4%

Other businesses engaged in...	#	%
Motel/hotel	2	13%
Bed & Breakfast	-	-
Ranches, resorts, lodges, hostels, hot springs	3	19%
Vacation homes, condos, cabins	7	44%
Public campgrounds	-	-
Private campgrounds	1	6%
Outfitter/Guide	-	-
Tours	1	6%
Travel planners	-	-
Event planners	1	6%
Vehicle rentals	-	-
Ski area	-	-
Museum, historic site	1	6%
Attraction	2	13%
Tourism promotion/advertising	-	-
Other	1	6%

*percent may not add to 100 (rounding)

Change in visitors ('09 to '10)	#	%*
Increase	18	64%
Decrease	5	18%
Remained the same	5	18%

Reason for Increase in 2010 **	#	%*
Better marketing	9	50%
Improved website	8	44%
Expanded operations/services	4	22%
Returning guests	9	50%
Little competition in my area	5	28%
Affordability of what we offer	7	39%
U.S. economy	5	28%
Canadian exchange rate	2	11%
Other foreign exchange rates	4	22%
More local travelers	3	17%
More regional travelers	4	22%
Special event(s) held in our area	7	39%
Weather	1	6%
Fire activity	-	-
Lack of fires	5	28%
Other	5	28%

*respondents could check multiple answers **n=18

Reason for Decrease in 2010**	#
Less advertising on our part	-
Reduced offerings/services	1
Fewer returning guests	-
Increased competition in my area	2
Our pricing may be too high	-
U.S. economy	3
Gas prices	3
Exchange rates	-
Fewer local travelers	-
Fewer regional travelers	1
Fewer business travelers	-
Fewer leisure travelers	3
Changes in hunting/fishing licenses	-
Construction in area	-
Weather	1
Fire activity	-
Lack of fires	-
Other	-

*respondents could check multiple answers; **n=5

Outlook for 2011	#	%
Increase	18	64%
Decrease	3	11%
Remain the same	7	25%

Outlook for 2011	If had Increase in 2010 (n=18)		If had a decrease in 2010 (n=5)	
	#	%	#	%
Increase	12	67%	1	20%
Decrease	2	11%	1	20%
Remain the same	4	22%	3	60%

Reason for Expected Increase in 2011 **	#	%*
Bookings/inquires are up	5	28%
More/better marketing pursued	9	50%
Improved website	7	39%
Experiencing a gradual increase	11	61%
Expanded or improved our offerings	2	11%
Affordability of what we offer	7	39%
Little competition in my area	2	11%
More local travelers	2	11%
More regional travelers	3	17%
We get many repeat customers	6	33%
Canadian exchange rate	2	11%
Other foreign exchange rates	1	6%
U.S. economy	5	28%
Special events in our area	2	11%
We are new, so we are increasing	2	11%
Other	3	17%

*respondents could check multiple answers

**n=18

Reason for Expected Decrease in 2011**	#
Bookings/inquires are down	2
We've done less marketing	-
Experiencing a gradual decrease	-
Reduced our offerings/services	-
Our pricing may be too high	-
Increased competition in my area	-
Expect fewer leisure travelers	2
Expect fewer business travelers	-
Expect fewer local travelers	-
Expect fewer regional travelers	-
Changes in hunting/fishing licenses	-
Gas prices	3
U.S. economy	3
Global economy	3
Other	-

*respondents could check multiple answers **n=3

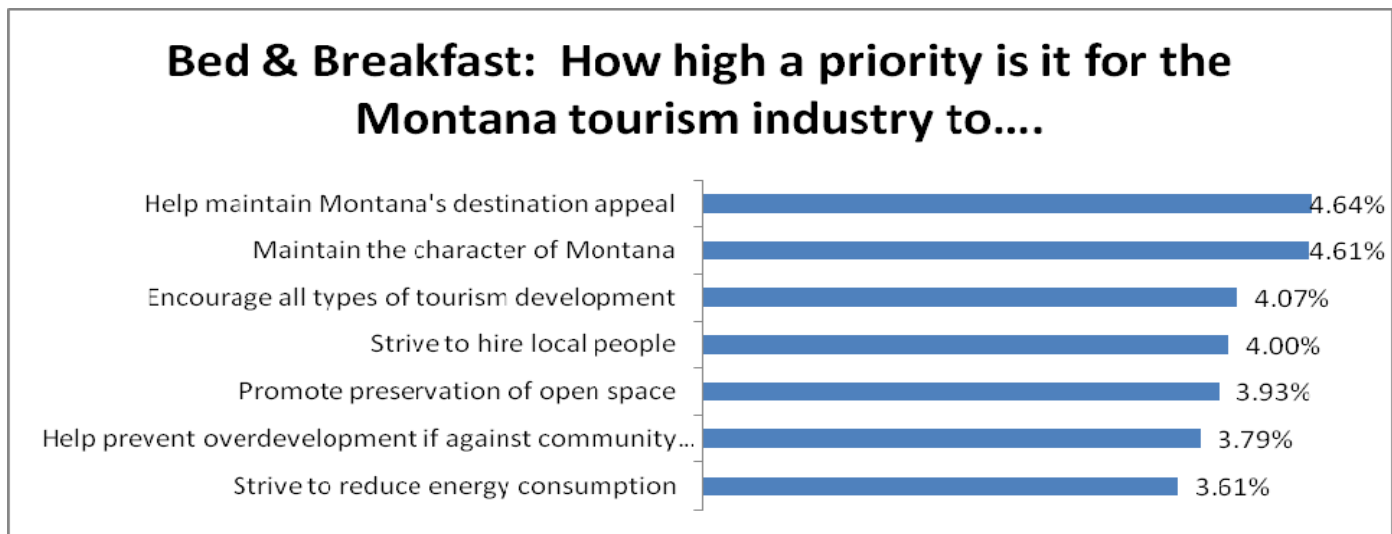
Plans for 2011**	#	%*
Expand current business or site	4	15%
Renovate current site	4	15%
Add more sites/business elsewhere	1	4%
Downsize current business or site	1	4%
Close down/sell business or site	3	11%
Remain the same	17	63%

*respondents could check multiple answers **n=28

What happened in regards to vacationers in 2010? n=28	Increased		Stayed the same		Decreased		NA
	#	%	#	%	#	%	
Last minute bookings	10	37%	15	56%	2	7%	-
Walk-in patrons	5	20%	10	40%	6	24%	16%
Retail sales	2	8%	8	32%	3	12%	48%
Dining out	2	8%	7	28%	3	12%	52%
Length of stay	7	29%	16	67%	1	4%	-
Visitors seeking less expensive activities	11	44%	9	36%	1	4%	16%
# of Montanans traveling within the state	7	27%	14	54%	3	12%	8%

How high a priority is it for the Montana tourism industry to..... (n=28)	Very low priority	Some-what low priority	Medium priority	Some-what high priority	Very high priority	Mean
Help maintain Montana’s destination appeal	4%	-	4%	14%	79%	4.64
Strive to hire local people	4%	-	32%	21%	43%	4.00
Promote preservation of open space	11%	-	22%	19%	48%	3.93
Help prevent overdevelopment if against community values	7%	11%	18%	25%	39%	3.79
Maintain the character of Montana	4%	-	4%	18%	75%	4.61
Encourage all types of tourism development	7%	11%	4%	25%	54%	4.07
Strive to reduce energy consumption	7%	14%	29%	11%	39%	3.61

*percents may not add to 100 due to rounding



Scale: 1=very low priority to 5=very high priority

Bed and Breakfast Summary

The sample size for bed and breakfast respondents, while small at 28, still provides a look into what happened in the industry and what they expect. Sixty-four percent of the bed and breakfast respondents experienced an increase in 2010 visitation and of those 67 percent expect an increase again in 2011. Better marketing and returning guests were stated as the reasons for increases while the business experiencing a gradual increase was the main reason for expecting an increase in 2011.

Bed and breakfast respondents indicated that helping maintain Montana’s destination appeal was the top priority of seven Montana tourism charter-related statements followed closely by maintaining the character of Montana. The statement, “strive to reduce energy consumption,” received the lowest priority rating by bed and breakfast owners.

Sixty-three percent of bed and breakfast respondents said they will make no changes to their business in 2011, however 15 percent of the bed and breakfasts said they will downsize or close. This is the highest number reported within any of the tourism businesses in the state. Bed and breakfasts are small establishments and many times run out of one’s own home. It shouldn’t be a surprise when B&B’s close as the owners move on to the next step in their lives.

Bed & Breakfast Comment Section

Montana, as we already know is an incredible state with so much beauty to offer. Those of us that live here know and respect this and only want to bring people here to make it better and to show it off. Some changes are necessary to update locations but this doesn't mean over commercializing - just improving. Businesses should be able to make improvements that would allow them to offer more and better to our community as well as travelers.

Due to illness in the family since December of 2008 we have had to cut back our business...due in part to lack of local available help

While we appreciate visitmt.com being free and funded by the bed tax, our bookings have come from our own efforts and we have seen little or nothing coming from the Montana Tourism and Recreation efforts. Guides/Outfitters, Fly Casting Clubs, our own newsletter and our own data base of contacts have fueled our business. As long as the Missouri River continues to produce the blue-ribbon trout that our guests are catching, our business will continue.

We are hoping to retire due to health and family pressures but the devalue of our property makes taking a profit for our retirement fund impossible. Appraised Value Turnkey before Obamaism was \$2.25 Million...now only \$1.12 Million

2010 was a down year but I think we are now at the bottom and it can only go up from here.

Back in April it seemed that reservations were coming in at a slower pace than the last few years. But then June, July and August, we had a surprising number of guests, and more than a few who called en route or who rang door bell, or who called with little advance time. And finally, September and October have been terrific months for us. We will run the numbers at the end of October. September and October.

I invested a lot of money in developing a new website with a professional internet marketing company. That has helped me to get new bookings the most.

We would greatly appreciate more promotion of winter visitation and winter sports opportunities in Glacier.

The Billings area needs to attract more large groups conventions such as the Goldwingers and the Harley motorcyclists. Also, the tornado damage @ the Metra is the cause of some drop in reservations in the area.

Our economy is a reflection of our conscience--the Tea Party in case. Citizens are concerned about our morals, costs of goods sold and bought, and the rise of Islam to name the top 3 I see and hear others talk about. Decades of compromise on sound economic principles and morals has brought citizens to distrust and even hate their government. Schools raising barbarians without morals--what is a value? A shopping term and a math term (the value of y!). Confusion as to what a human baby is, what a marriage is, what a family is, what truth is, what a lie is, etc. We may have a nice state to visit, but without a moral foundation, we will surely collapse under our own decadence. In short, to plan on how people will spend their money, if they have it, is optimistic. I don't spend because I don't have it to spend. I've lowered my rates but that doesn't help me since costs are still high--gas, food, everything!! What do kids have to look forward to--nothing. They have been cheated out of a life by the greed of their parents who took it all for themselves. God can't bless America--it has turned it's

back to Him and He won't bless America--utter hypocrisy. If anything, judgment is deserved upon this nation that boasts and supports evolution the psuedo science without evidences in every field--I like science and use it to expose the con artistry of our educational departments at state level and in the public schools. I'm ashamed of what America is and promote a return to soundness in all areas of life--spiritual, economic, education, work. I'm in my late 50's and I've seen the decay of the quality of life and the character of citizens abandoning respect and fear of God--I am a Christian who has been violated in my own state under the ruse of law--man's law. We all know about the infamous MPC and the Power Brokers--"Enron". A few thoughts as I prepare to enter the 2011 season and some content I talk with guests about.

All other comments

We appreciate all that you do for the industry and the communities. Montana thanks you!

Invite open-minded people. They're more fun than the uptight conservatives afraid to part with their money.

My concerns are that Walmart and other business's provide free parking are NOT paying the bed tax that we as a RV business ARE REQUIRED TO PAY this tax!

Need to coordinate activities with Montana Historical Society, Fish, Wildlife and Parks, and Department of Transportation regarding maps and historic sites.

Tourism is often a challenge and many factors enter into the equation. However, because Montanan's by necessity are resourceful business people, we survive these challenges with renewed energy and vigor. We will survive, forge on, and become better at what we do.

Montana's biggest problem is its anti-business mentality. I had a customer who was in the oil exploration business who was laughing because he saw Governor Schweitzer on TV telling the oil companies that "Montana is open for business" He said Montana was the last place anybody in his line of business would come to try to do business. He said there are so many hoops to jump through and restrictive regulations that the Governor can say whatever he wants about being "open for business" but the reality of the situation is completely different. This state cannot survive on its beauty alone, we need industry and jobs.

Reason for marking energy consumption as a low priority- To be honest the effort is there, but just not enough people to make it happen. I don't mean not enough willing people, just not enough people period. Montana is a big state with few people. Electric cars, and items useful for urban living, does not fit in Montana. Recycling is too expensive, and the efforts for biodegradable items are lost when thrown in a plastic garbage bag. Wind, solar, and hydro power should be the focused green direction.

You are doing a super job and we appreciate all your hard work! Mary b.

Your first question set me back. Shopping is one of our visitors top 3 activities yet we as retailers aren't even mentioned in your list.

With Great Lakes direct flights to/from the Havre to/from Denver we beginning in Nov. we expect an increase in business both directions.

No more taxes please that continues to help tourism

