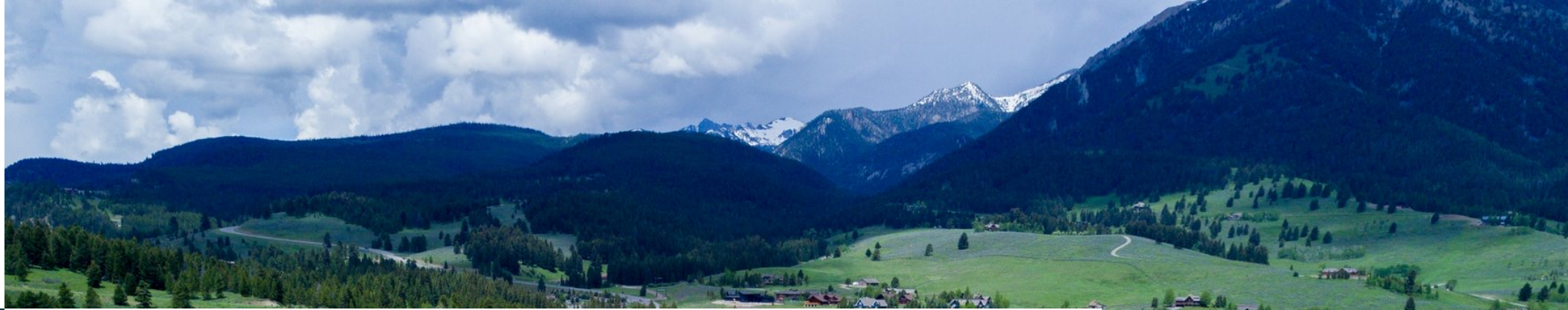




CROSSCURRENTCOLLECTIVE.COM



BIG SKY | MONTANA RESIDENT AND TOURISM INDUSTRY SENTIMENT SURVEY

Survey Results 2023





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INTRODUCTION

- SURVEY DESIGN AND METHODOLOGY
- SURVEY RESPONSES



INTRODUCTION

Purpose and Intent

This presentation outlines the process and outcomes of a survey conducted in 2023 by ECONorthwest and Crosscurrent Collective. The survey's objective is to collect insights from both residents and stakeholders in the tourism industry regarding their experiences and perceptions of living or working in the broader Big Sky region. The survey results will play a crucial role in shaping Visit Big Sky's destination strategy, enabling them to leverage opportunities and enhance the experiences of residents.

INTRODUCTION

Survey Design and Methodology

ECONorthwest, in collaboration with Crosscurrent Collective and Visit Big Sky, formulated a concise set of survey questions aimed at pinpointing the most relevant factors influencing the sentiments of residents and stakeholders in the tourism industry. These insights would serve as vital inputs for shaping Visit Big Sky's tourism strategy.

The survey was created using Survey Monkey and was exclusively available online. It comprised a total of **47 questions**, with an estimated completion time of **approximately 15 minutes**.

The Visit Big Sky outreach team set a **target sample size of 341** respondents, based on the local population of 3,054, to achieve a 95% confidence level with a 5% margin of error.

To gather responses, the Visit Big Sky outreach team employed various methods, including the distribution of survey materials online, delivery of cards featuring a survey QR code and URL to local businesses and other venues in the Big Sky area, and in-person intercept surveys conducted by ECONorthwest.

Big Sky's Future of Tourism Survey

Help shape the future of tourism in Big Sky!

Do you live or work in Big Sky? Have you visited in the last three years? We want to hear from you!

Visit Big Sky is seeking input from residents, stakeholders, and recent visitors (within the last three years) about the current tourism economy in Big Sky and what opportunities lie ahead. Your feedback will help shape the future of tourism in Big Sky and improve the experience for visitors and residents alike.

Whether you call Big Sky home or are just visiting, we want your input! Survey respondents may enter to win a pair of skis from Peak Ski Co.

visitbigsky.com/big-skys-future-of-tourism-survey

VISIT
BIG SKY
^ MONTANA ^

INTRODUCTION

Survey Outreach and Intercepts

Half of the noted methods of receiving the survey were through online outreach via email (27%) and social media (24%).

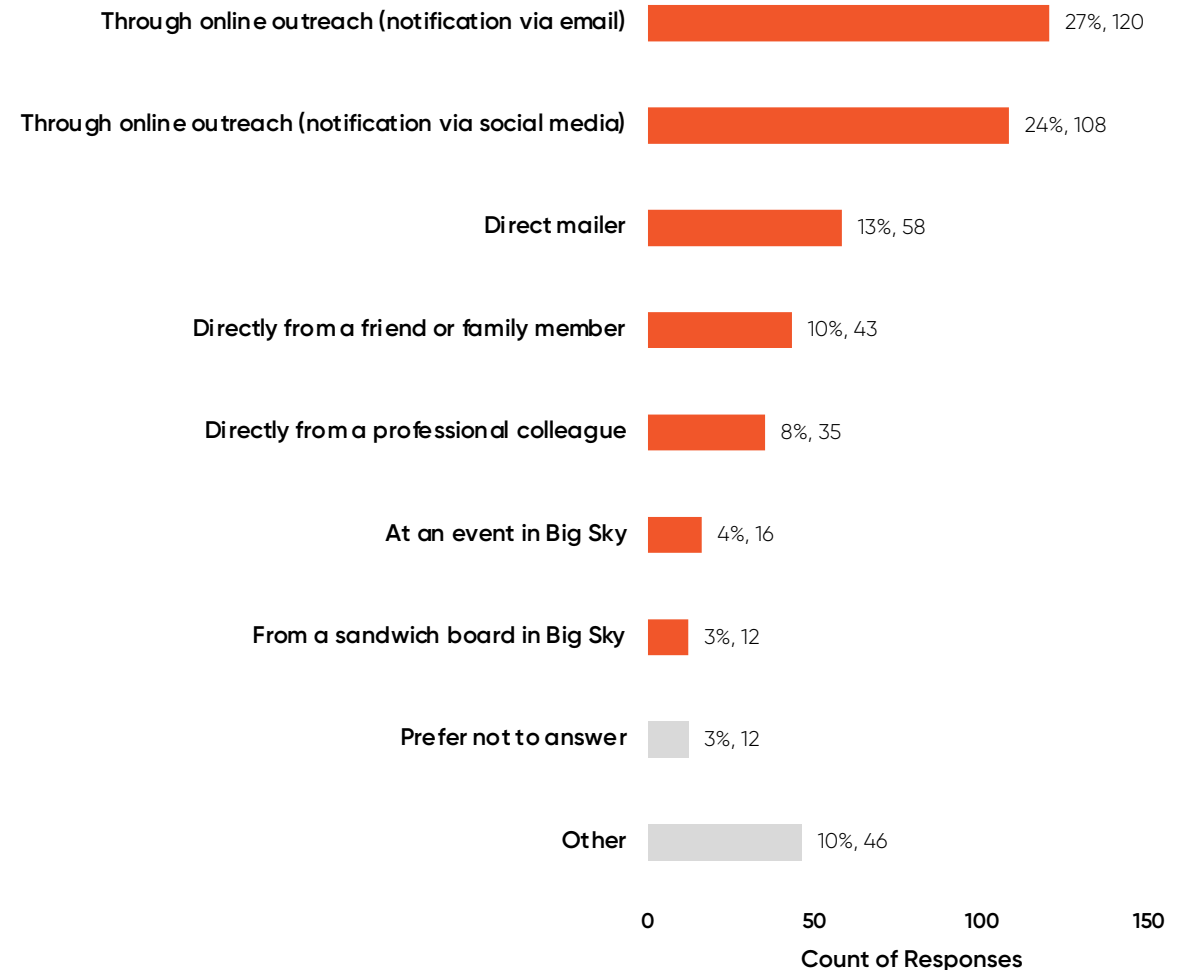
Intercept surveys were conducted during the month of September at the following events and locations:

- Big Sky Town Center
- Music in the Mountains Concert Series
- Big Sky Town Center Oktoberfest
- Beehive Basin Brewery

About 4% of the 451 survey respondents reported receiving the survey from an in-person intercept.

The “Other” category for survey reception primarily included Explore Big Sky and specific methods similar to those in the methods list.

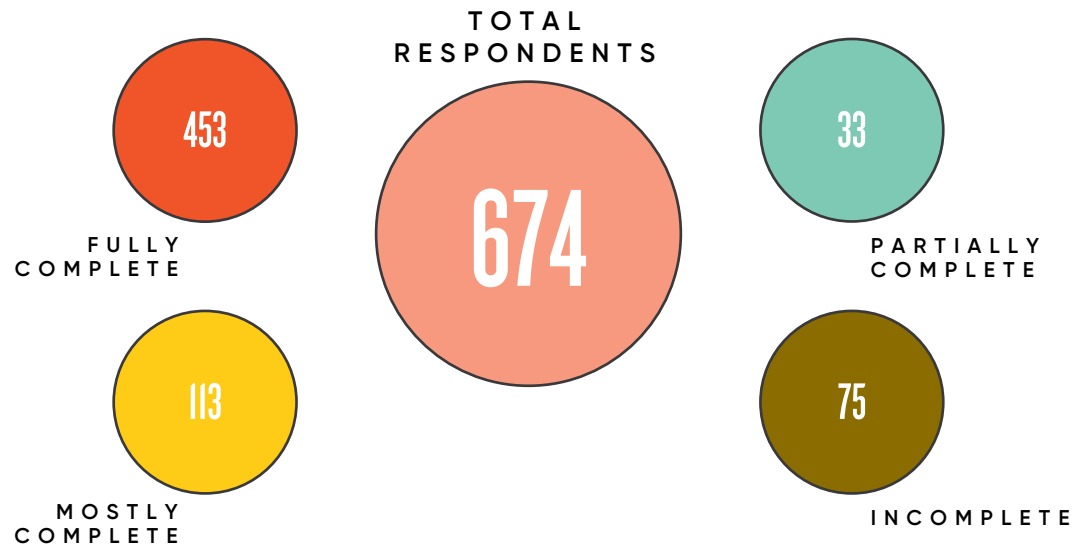
HOW RESPONDENTS RECEIVED THE SURVEY



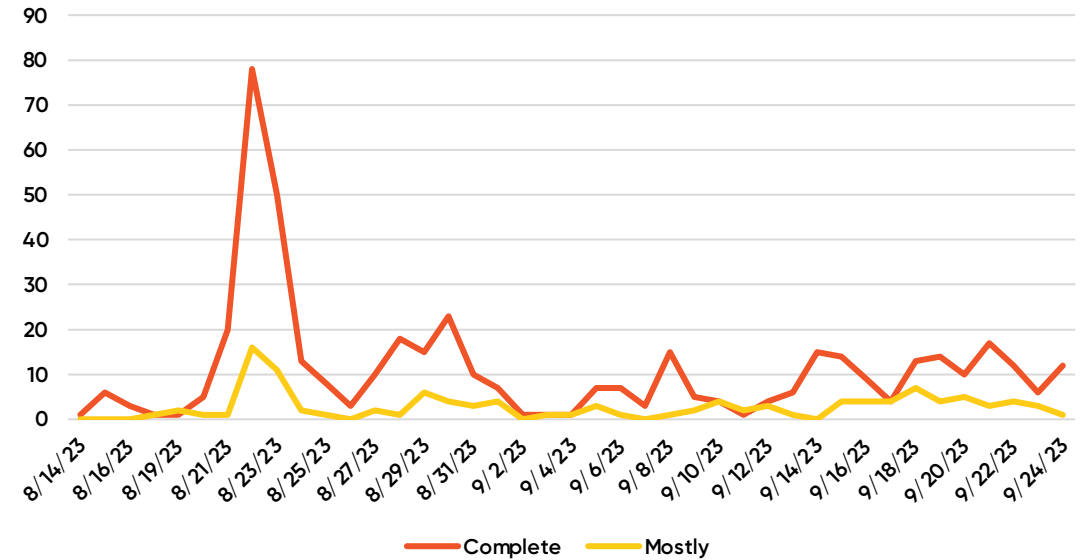
INTRODUCTION

Survey Response

The survey opened to the public on August 15, 2023 and closed on September 24, 2023. In total, there were **674** responses collected in the six weeks the survey was open. Of those total responses, **453** surveys were fully completed, **113** were mostly complete, **33** were partially complete and **75** were incomplete, having answered one to six questions. The prize drawing captured 266 interested respondents that consented to sharing their contact information.



SURVEY RESPONDENTS OVER TIME



TIME TO COMPLETE SURVEY

	Average Time	Min Time	Max Time
Fully Complete	0:30:04	0:07:46	1:56:47
Mostly Complete	0:16:44	0:02:28	1:49:27

02

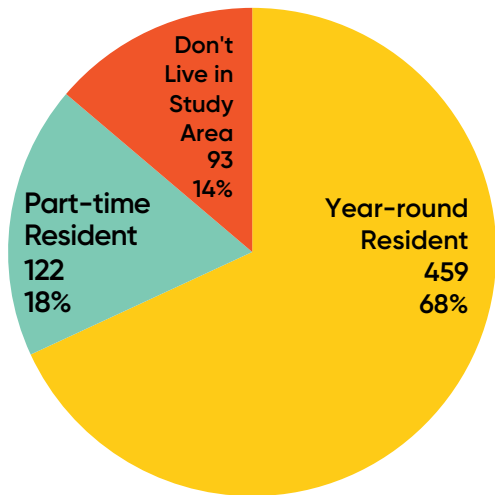
DEMOGRAPHICS

- RESIDENCY
- AGE | GENDER | RACE
- EMPLOYMENT | INCOME

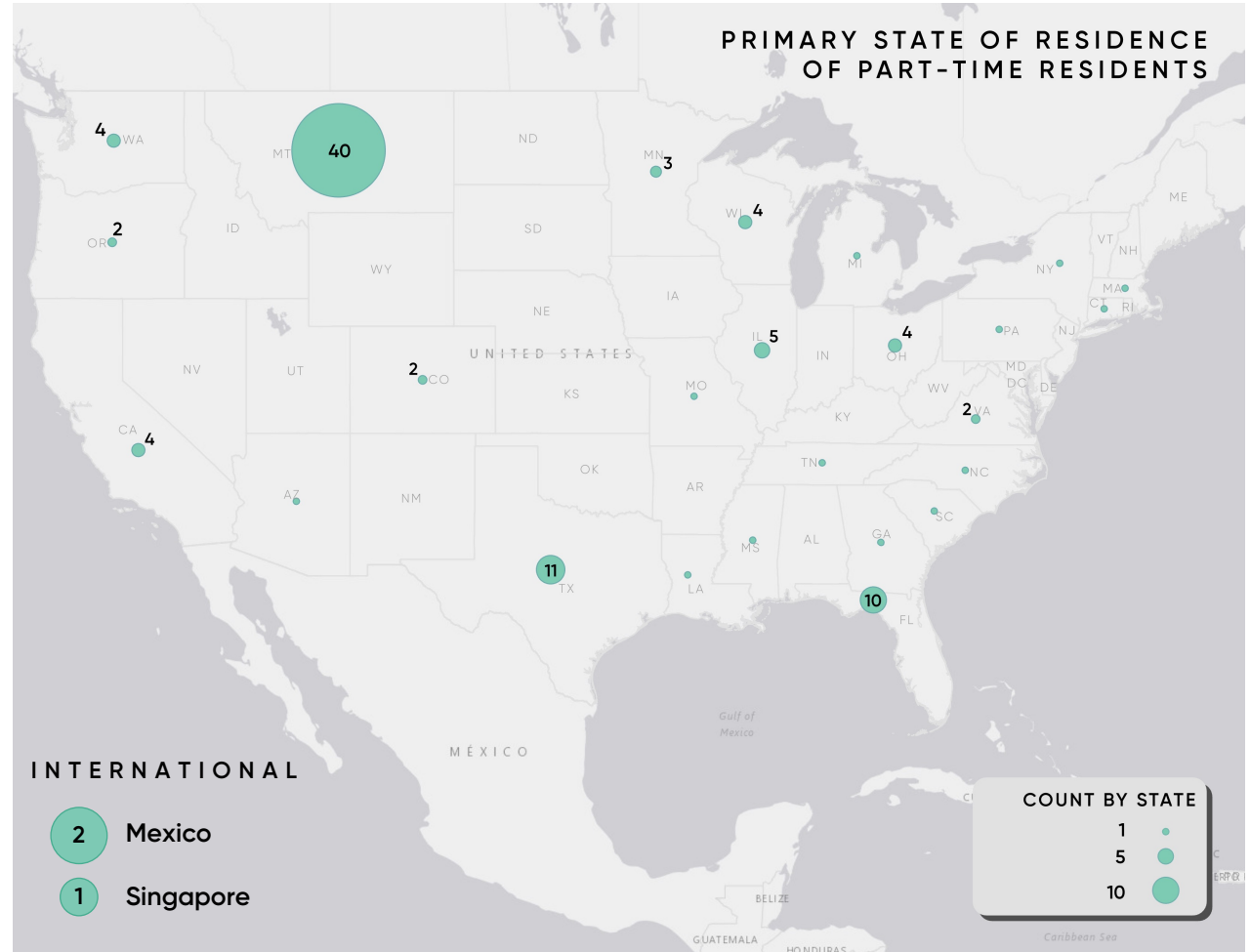
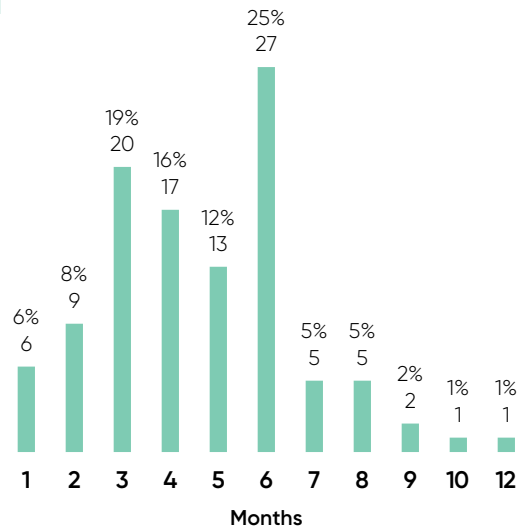
DEMOGRAPHICS

Place of Residency

TYPE OF RESIDENT



PART-TIME RESIDENTS: MONTHS SPENT IN BIG SKY PER YEAR



PRIMARY RESIDENCE OF NON BIG SKY RESIDENTS



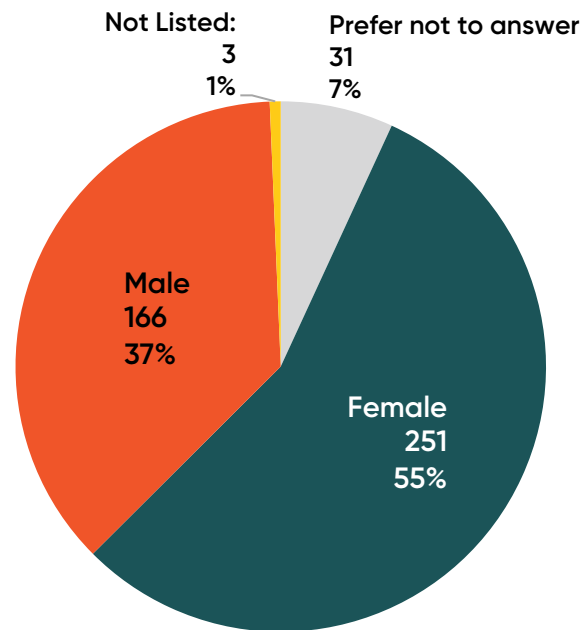
Out of the 674 respondents, 459 indicated that they reside in the Big Sky area year-round, while 122 identified themselves as part-time or seasonal residents. The primary residence for most part-time residents were in communities outside of Big Sky, MT, with Bozeman being among the most frequently mentioned. Additionally, part-time residents typically spend three to six months in Big Sky.

DEMOGRAPHICS

Gender

Out of the 451 respondents who reported their gender, a majority (55%) identified as Female, with 251 respondents. Additionally, 166 (37%) identified as Male, while 31 (7%) indicated a preference not to answer, and three respondents marked "not listed."

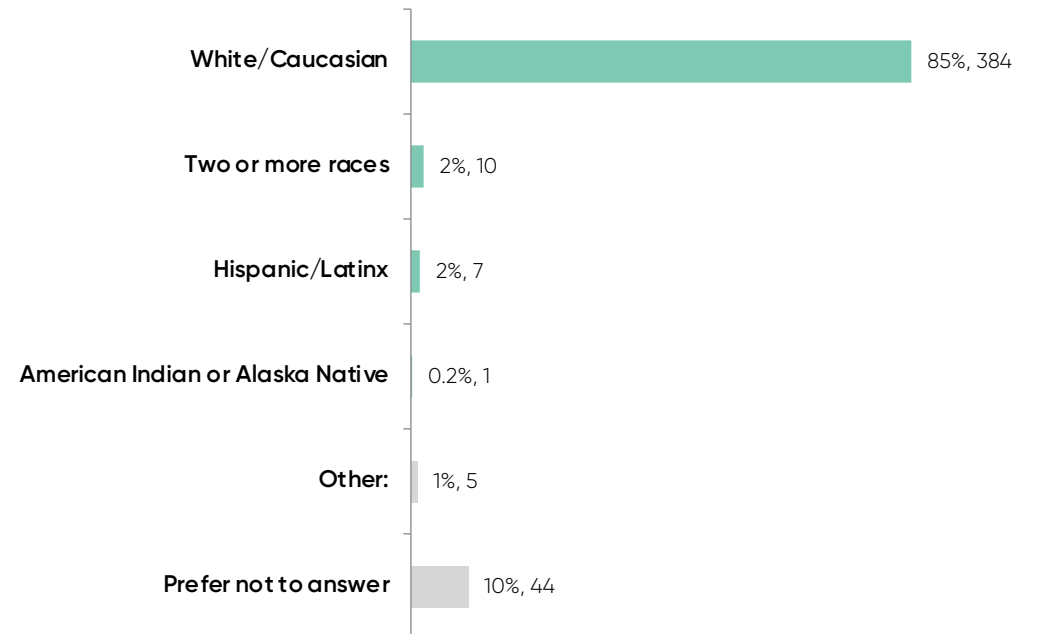
GENDER OF RESPONDENTS



Racial Background

The majority of survey respondents identified as White/Caucasian, comprising 384 (85%) of the 451 responses. Forty-four (10%) respondents chose not to answer.

RACIAL BACKGROUND

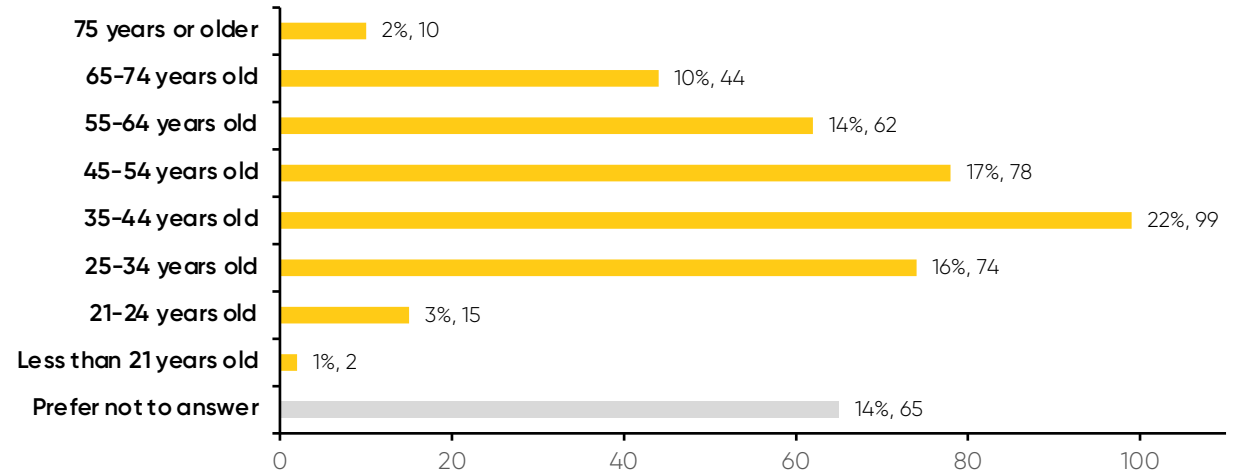


DEMOGRAPHICS

Age

452 respondents reported their birth year, and 3 entries were invalid. The majority fell within the 35-44 age range, comprising 99 respondents (22% of those who answered this question). The average age of residents was 46 years old.

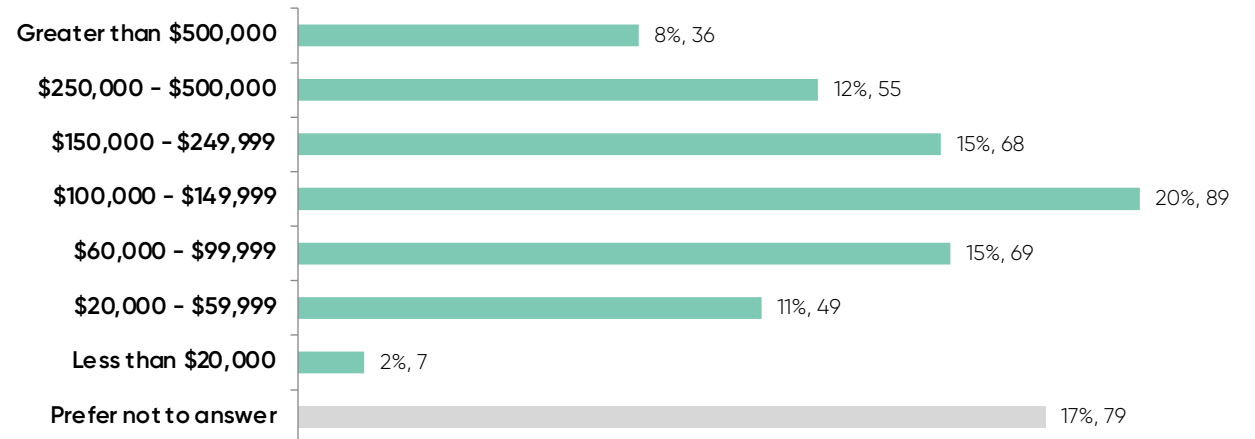
AGE OF RESPONDENTS



Income

The annual household income range most frequently reported was \$100,000 - \$149,000, with 89 out of the 452 respondents who answered this question (20%). Among the 674 total survey respondents, 452 (67%) disclosed their income, while 222 (33%) chose not to answer this question.

ANNUAL HOUSEHOLD INCOME



DEMOGRAPHICS

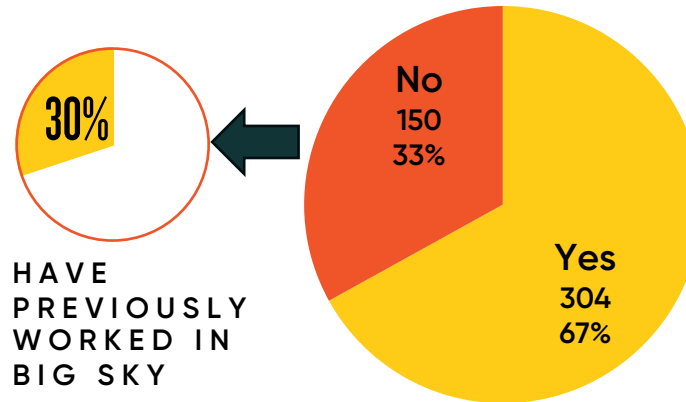
Employment in Big Sky

Approximately 67% of respondents currently work in Big Sky, with an additional 30% having worked there previously. Reasons for not continuing to work in Big Sky include retirement, commuting, job endings, affordable housing, low wages, and limited career opportunities.

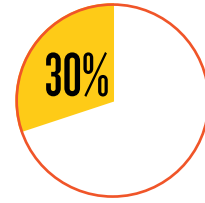
A small percentage (5%) were seasonal or part-time workers, and a majority of them expressed an interest in year-round employment.

On average, residents in Big Sky had an employment duration of 11 years and 5 months, indicating a well-established community. However, there were fewer residents with less than six months of work history in Big Sky. The survey might not have captured new employees who work in Big Sky but live outside the study area.

RESPONDENTS WHO CURRENTLY WORK IN BIG SKY



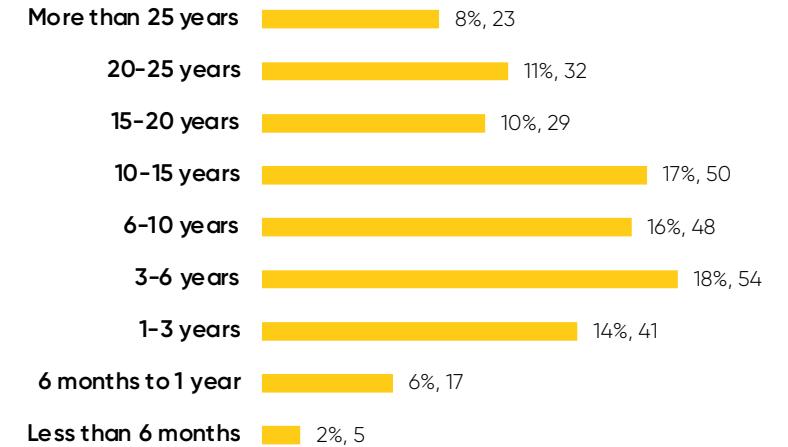
HAVE PREVIOUSLY WORKED IN BIG SKY



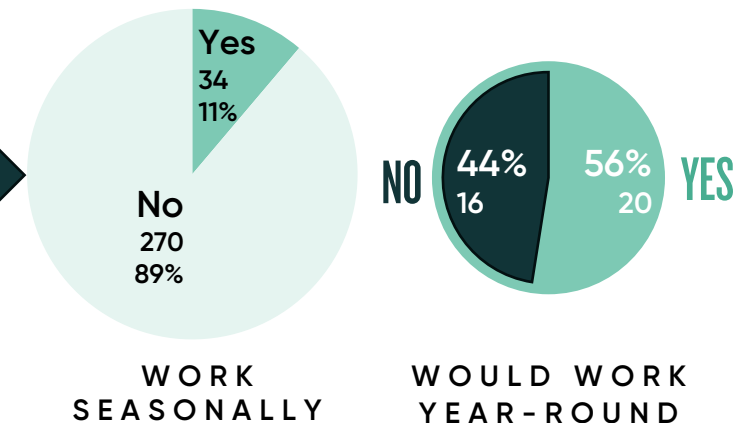
REASONS FOR EMPLOYMENT CHANGES



BIG SKY EMPLOYMENT DURATION



SEASONAL EMPLOYMENT

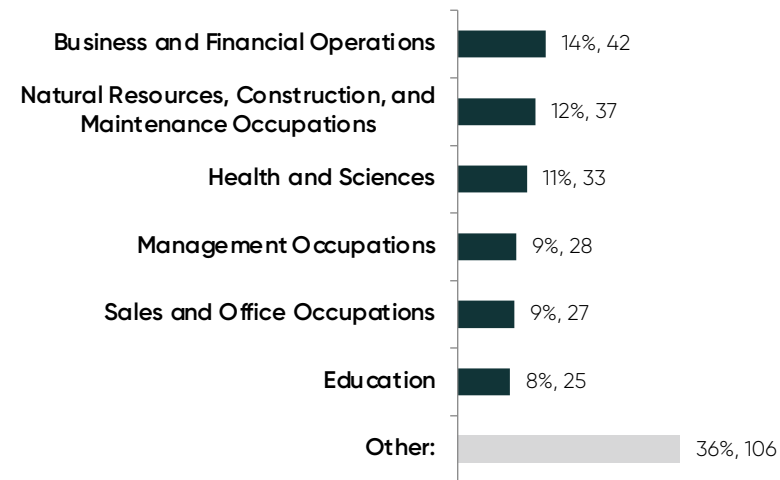


DEMOGRAPHICS

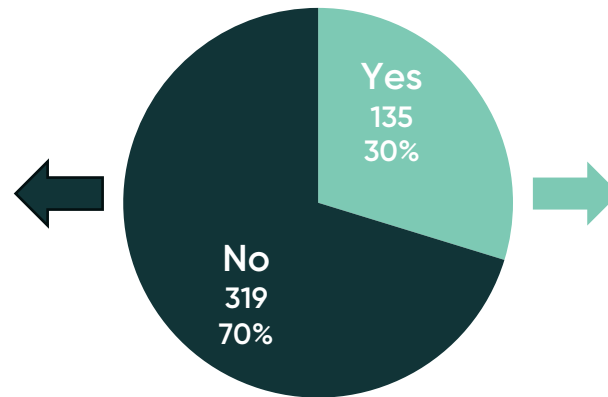
Employment in Tourism Industry

The **tourism industry employs around 30%** of the surveyed respondents who answered the question. Among this group, their primary focus is on the outdoor recreation sector. Additionally, these individuals tend to have an average of approximately 10 years of experience in the tourism industry.

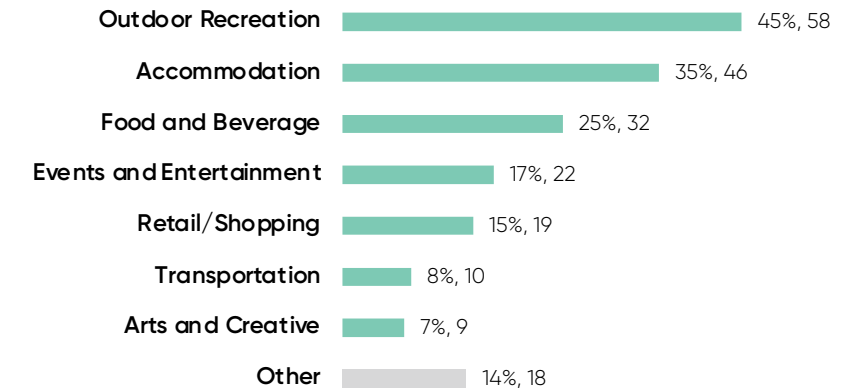
EMPLOYMENT INDUSTRIES



EMPLOYED IN TOURISM INDUSTRY

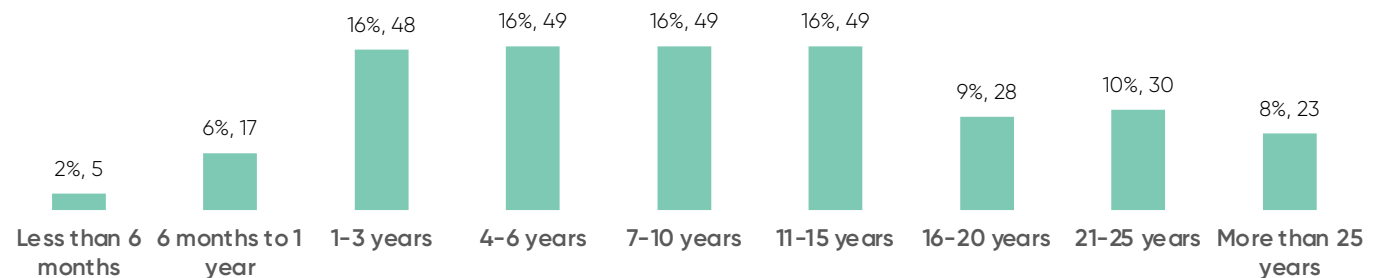


SECTORS OF TOURISM INDUSTRY WORKED BY RESPONDENTS



Of the respondents asked about their employment in the tourism industry, the majority (70%) reported not working in it. Most respondents were employed in the Business and Financial Operations sector or Natural Resources, Construction, or Maintenance Occupations. The 'Other' categories typically encompassed subindustries related to the six primary employment sectors mentioned.

DURATION OF EMPLOYMENT IN TOURISM INDUSTRY



03

RESIDENT SENTIMENT

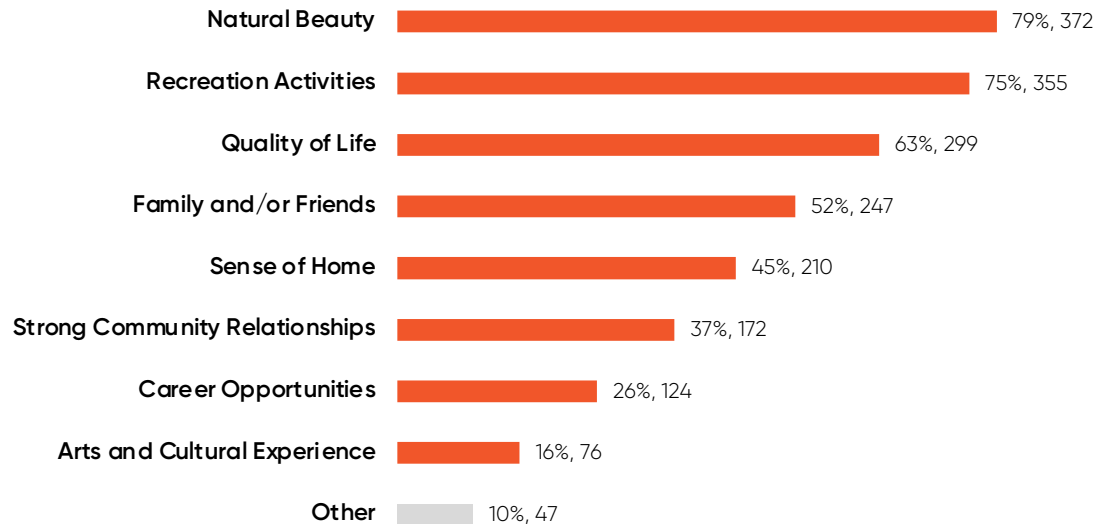
- SENSE OF PLACE AND COMMUNITY
- LIVELIHOOD AND TOURISM
- SENTIMENT OF TOURISM

RESIDENT SENTIMENT

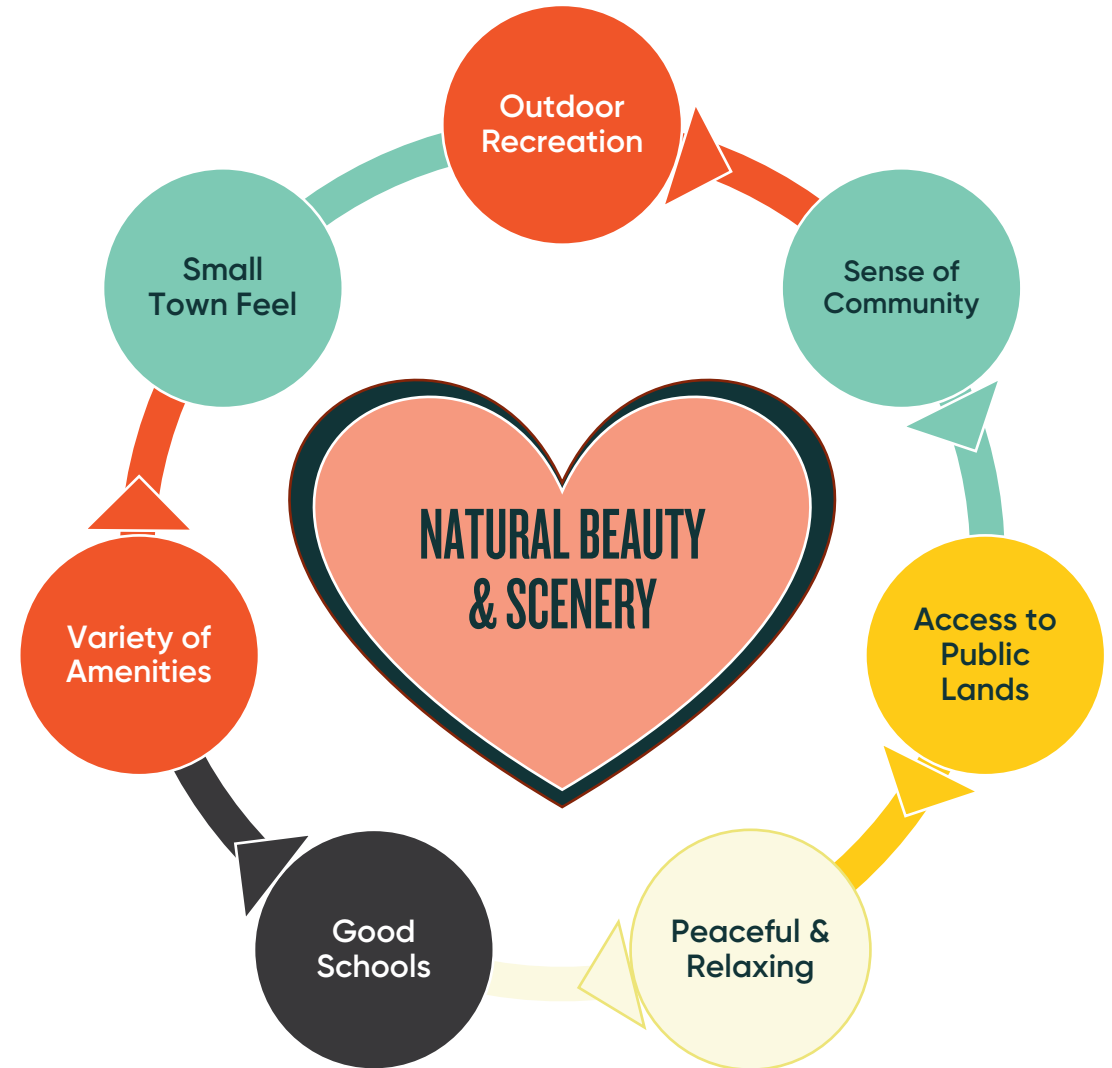
For the Love of Big Sky

When respondents were asked about what they love about Big Sky, many expressed their appreciation for the natural beauty and scenery, outdoor recreation opportunities, and a strong sense of community. These aspects closely align with the top factors that influence residents to continue living in Big Sky.

FACTORS KEEPING RESIDENTS LIVING IN BIG SKY



WHAT DO RESPONDENTS LOVE ABOUT BIG SKY?

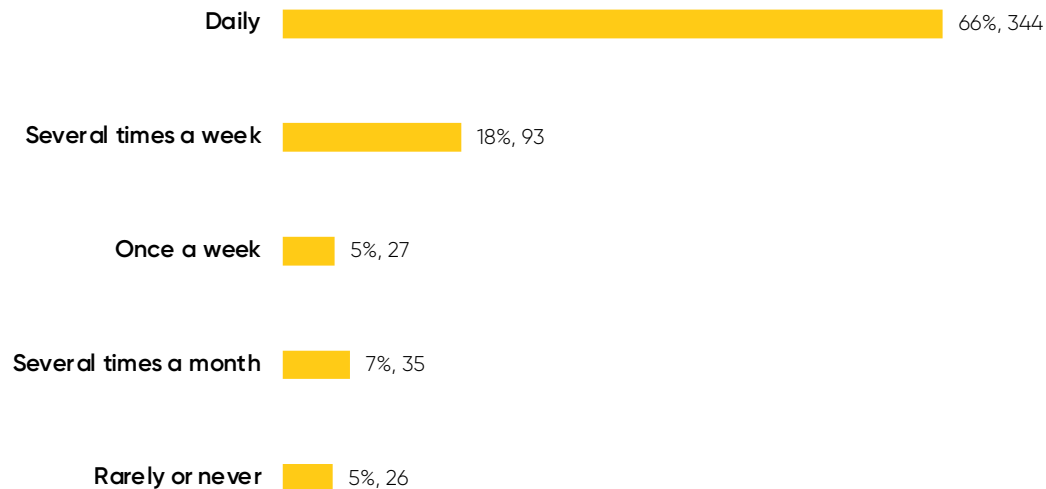


RESIDENT SENTIMENT

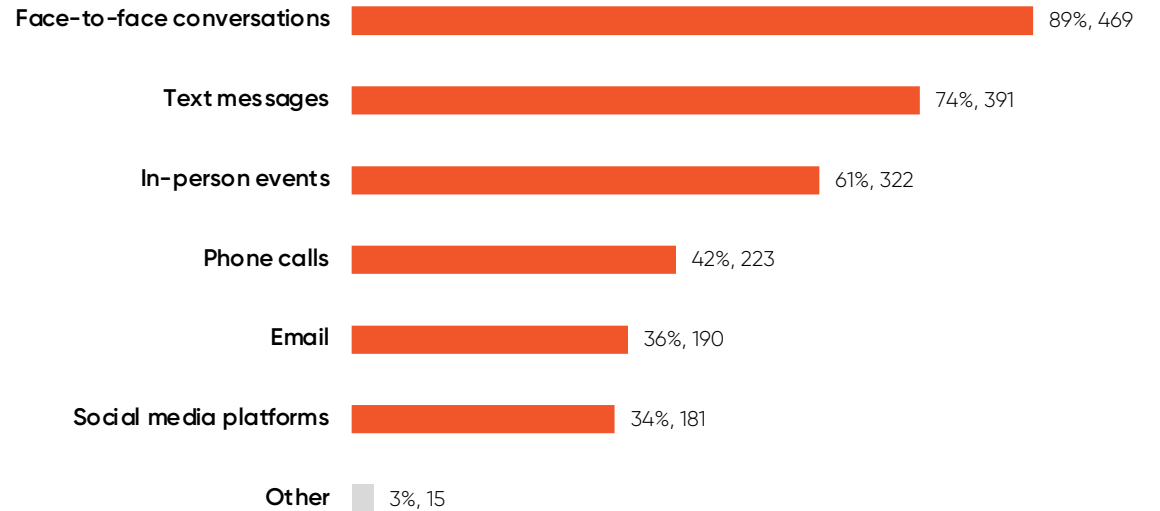
Sense of Community

Big Sky residents hold their sense of community and the town’s small-town ambiance in high regard. When asked about their communication practices within the community, most respondents indicated frequent daily interactions. Overall, the preferred methods for regular communication were face-to-face conversations or community events, along with text messages.

FREQUENCY OF COMMUNICATION WITH BIG SKY COMMUNITY



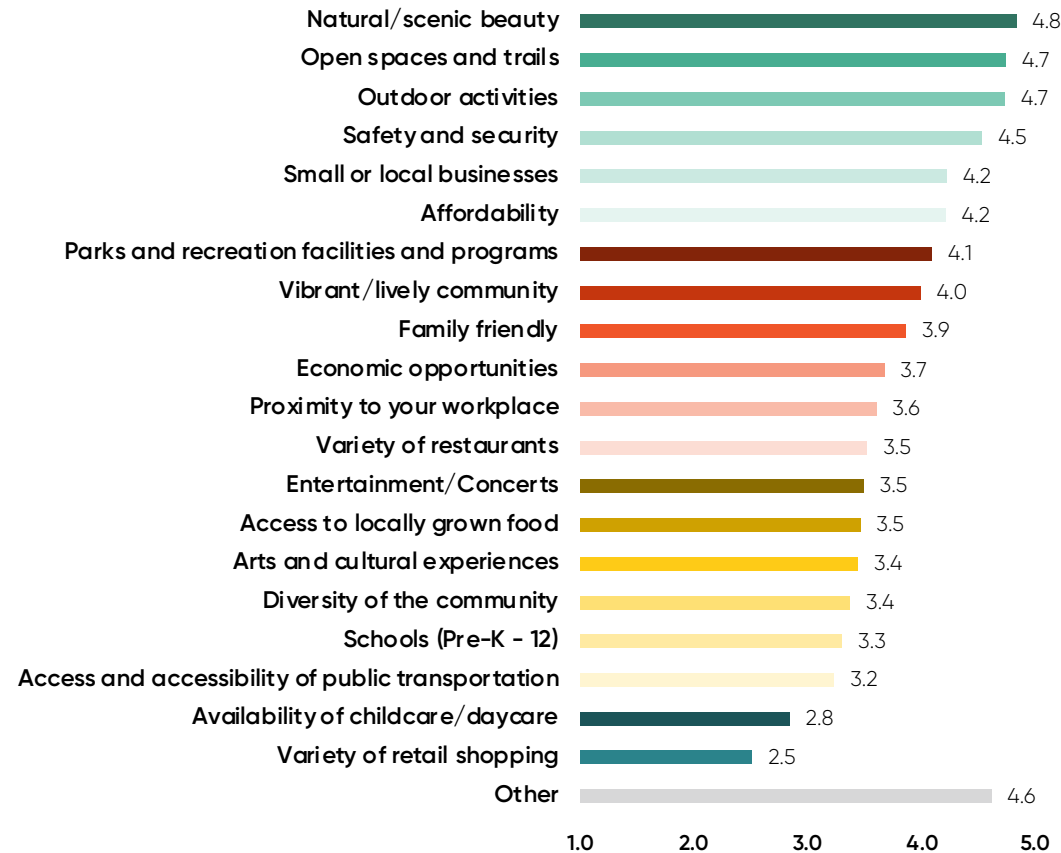
METHODS OF COMMUNICATION WITHIN BIG SKY COMMUNITY



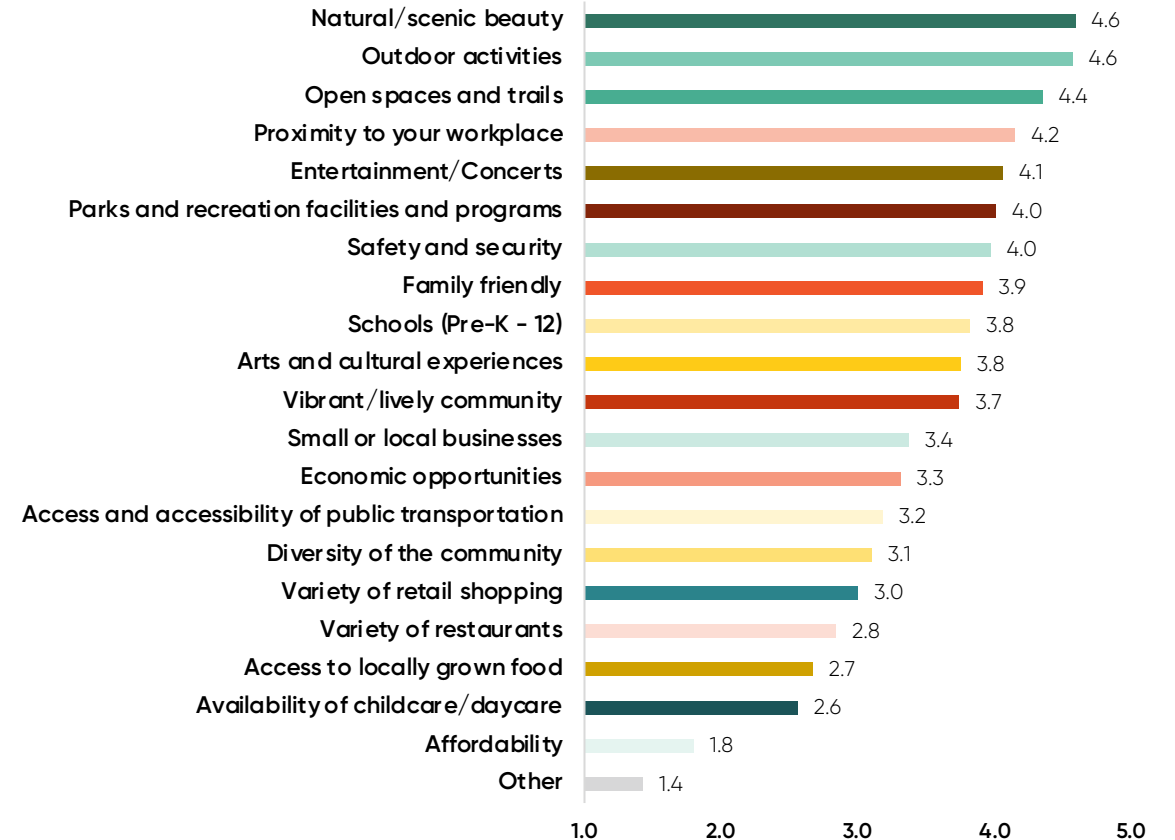
RESIDENT SENTIMENT

Quality of Life in Big Sky

IMPORTANCE OF FACTORS FOR QUALITY OF LIFE



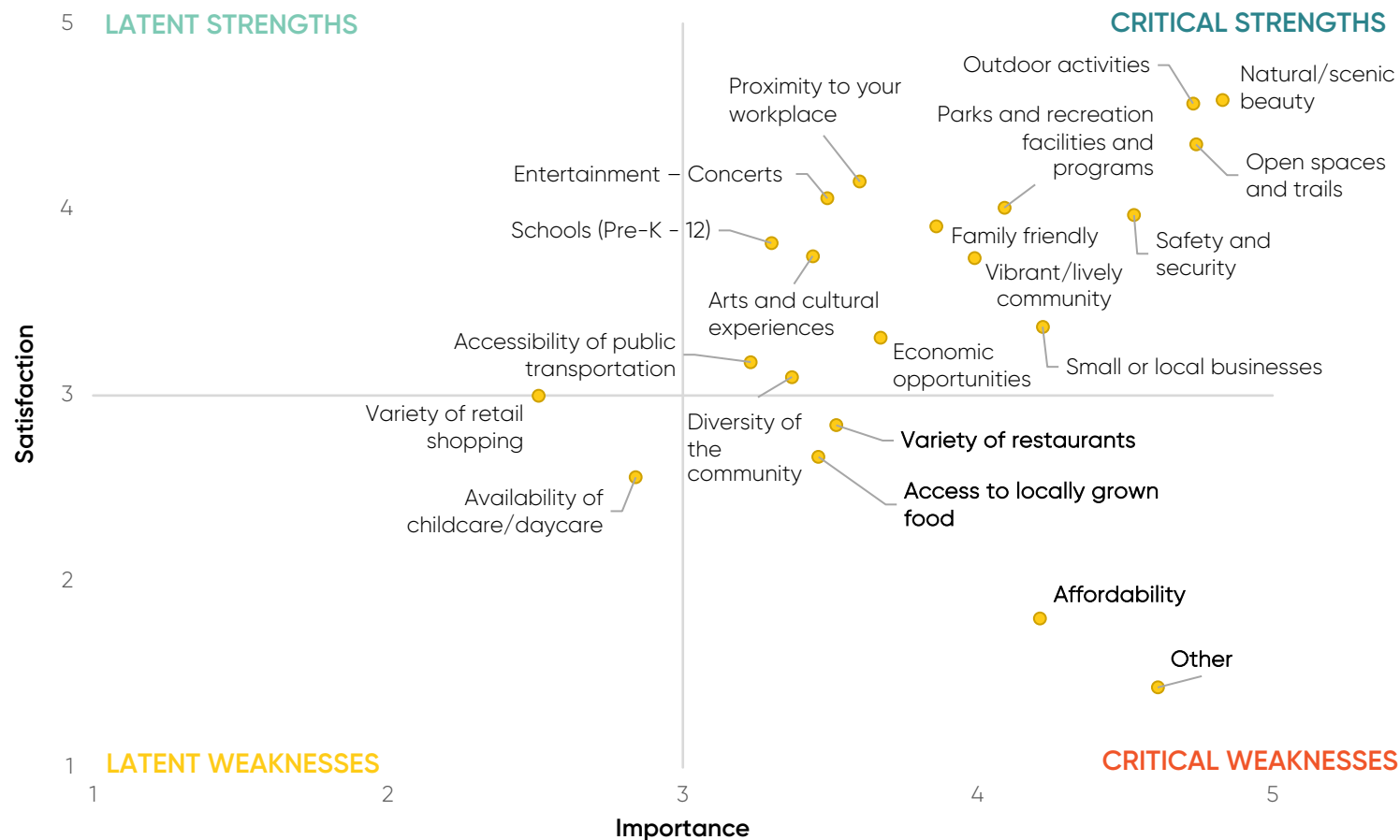
SATISFACTION OF FACTORS FOR QUALITY OF LIFE



RESIDENT SENTIMENT

Importance and Satisfaction Factors for Quality of Life in Big Sky

IMPORTANCE AND SATISFACTION MATRIX



DEFINITIONS

Respondents rated importance and satisfaction on a scale from 1 to 5, where 3 is neutral, less than 3 is latent, and greater than 3 is critical.

LATENT WEAKNESSES are factors of comparatively low importance and low satisfaction. These factors are a low priority.

CRITICAL WEAKNESSES are factors of comparatively high importance and low satisfaction. These factors should be prioritized.

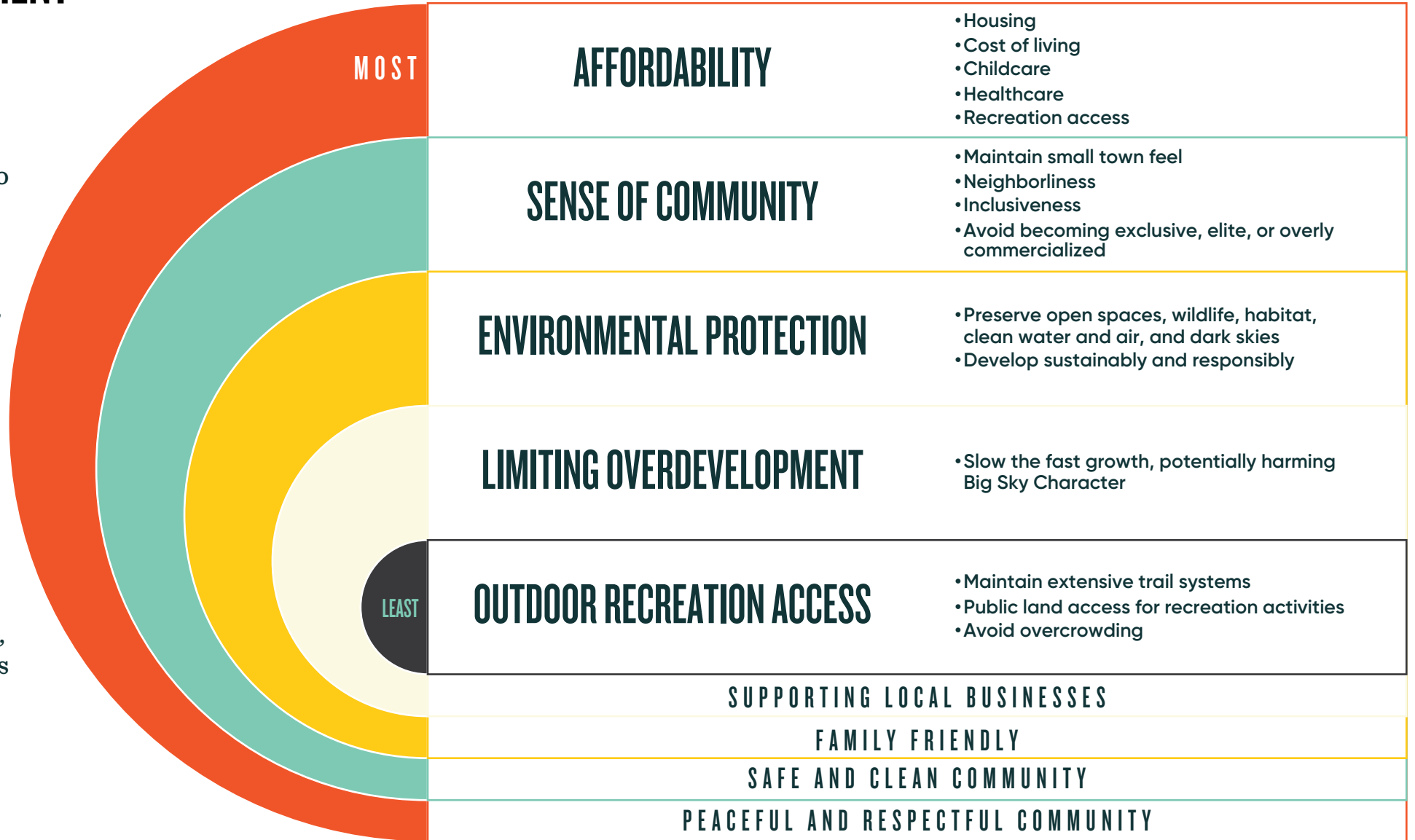
LATENT STRENGTHS are factors of low importance and high satisfaction. Due to their high performance, these factors are also a low priority.

CRITICAL STRENGTHS are factors of both high importance and high satisfaction. Continued strong performance in these areas is a top priority.

RESIDENT SENTIMENT

Local Values

As Big Sky continues to develop, respondents emphasize the significance of upholding local values, including maintaining affordability, a strong sense of community, environmental preservation, responsible growth, accessibility to outdoor recreation, and support for local businesses. In essence, these factors emerge as the foremost local values to preserve.

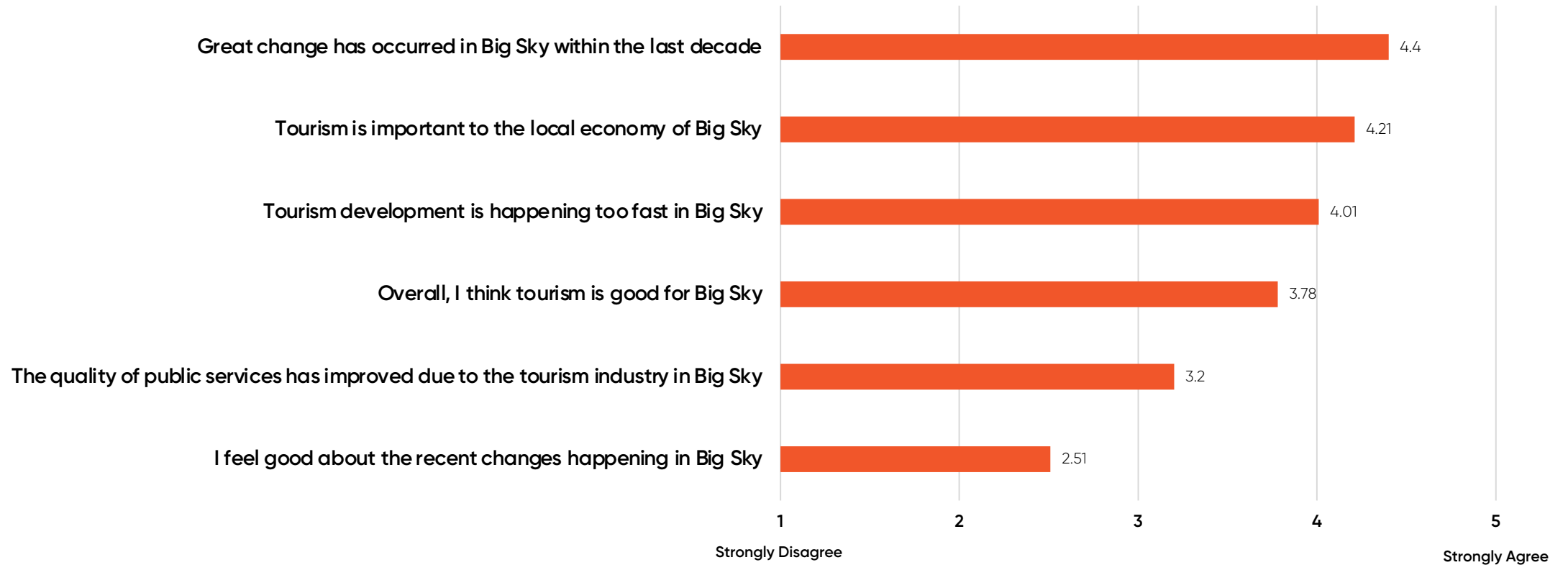


RESIDENT SENTIMENT

Take on Tourism

Overall, respondents expressed a strong sentiment regarding significant changes that have transpired in Big Sky over the past decade, and their feelings toward these recent developments are generally negative.

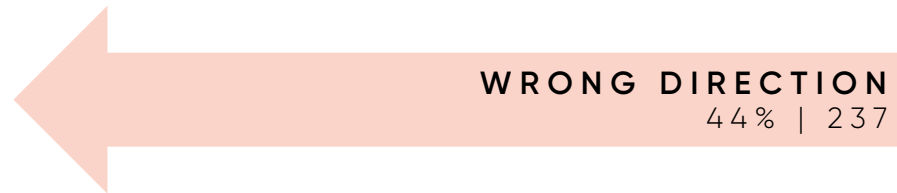
RESPONDENT RATING OF TOURISM STATEMENTS



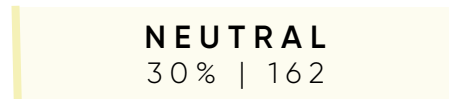
RESIDENT SENTIMENT

RESPONDENTS OPINION ON THE DIRECTION TOURISM IS HEADED IN BIG SKY

Tourism Growth



- Too much **overdevelopment** and construction happening too quickly without adequate infrastructure or planning.
- Housing crisis - **Lack of affordable housing** for local workforce. Short term rentals displacing long term rentals. Pushing middle class families out.
- Caters too much to the **ultra-wealthy and elite crowds** rather than regular families. Becoming too expensive and exclusive.
- **Environmental damage** from crowds and development. Traffic congestion, pollution, wildlife disturbances, fire danger, etc.
- **Loss of community**, small-town feel, and authenticity. Catering to tourists over residents.
- **Underpaid and overworked staff** can't keep up with demands. Businesses understaffed. High employee burnout.
- **Locals priced out** of recreation access and town amenities they can no longer afford. Disappearing public lands.
- Poor planning and management by developers. **Lack of resident input**. Greed over community.



- Tourism needed for economy, but causes growing pains
- Unsure of impacts
- Growth is inevitable, focus on responsible management
- Tourism not the problem, concern is type of real estate development
- Balance tourism with community needs like housing and infrastructure



- **Growing economy and job opportunities** from tourist spending at local businesses.
- **New amenities**, restaurants, hotels, and recreation options. Better facilities at the ski resort.
- Shoulder seasons expanding so businesses can **stay open more consistently year-round**.
- **Improved infrastructure** over time like roads, parking, transportation services, etc.
- **More housing options** being built, including workforce housing.
- Management organizations **addressing community needs** and issues.
- Drawing in a **higher-spending tourism market** for the economy.

RESIDENT SENTIMENT

Tourism Impact on Quality of Life

LEVEL OF AGREEMENT WITH TOURISM STATEMENTS

In line with other sentiments expressed, respondents believe that the rapid growth of tourism is leading to price increases, which in turn is reducing affordability for residents. Furthermore, they express a degree of disagreement regarding the responsible and sustainable nature of tourism growth.



RESIDENT SENTIMENT

Suggestions for Better Alignment Between Residents Needs and Tourism Industry

These ten suggestions, provided by respondents, represent ways in which the tourism industry can better align with the needs and desires of Big Sky residents. In summary, the most prevalent recommendations revolved around sustainable growth management, preserving the community's character, enhancing affordability and accessibility for residents, and promoting tourist education.



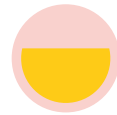
PREVENT OVERDEVELOPMENT

Preserve open spaces, wildlife habitat, dark skies, peace and quiet
Develop responsibly



LOCAL DISCOUNTS

Provide incentives or special rates for locals on amenities like ski passes, events, restaurants, and recreation to offset tourism costs



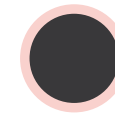
IMPROVE INFRASTRUCTURE

Improve roads, parking transportation to handle increased crowds
Reduce traffic congestion



DEVELOP AFFORDABLE HOUSING

Desirable housing options for local workforce
Options beyond seasonal dorms
Allow residents to put down roots



LIMIT SHORT-TERM RENTALS

Free up housing for locals and employees
Consider adjusting regulations, taxes, caps, or bans on STRs



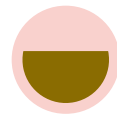
VISITOR EDUCATION

Educate tourists on respecting the environment, wildlife, and trails
Set proper expectations like leave no trace



INVEST REVENUE IN COMMUNITY

Invest tourism dollars in community needs like housing, roads, and recreation for residents
Use taxes wisely



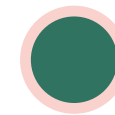
SUPPORT LOCAL BUSINESSES

Support more small, local, independent businesses and restaurants
Keep costs like rent affordable



RESTRICT DEVELOPMENT

Restrict high-end resort development
Focus on affordable, non-luxury tourism options
Keep Big Sky accessible



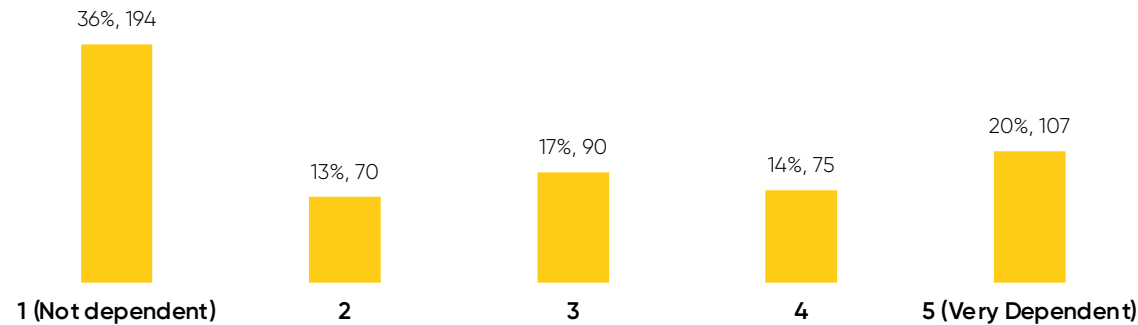
FAMILY FRIENDLY

Provide more family-friendly, affordable activities and events for locals and a wider demographic of tourists

RESIDENT SENTIMENT

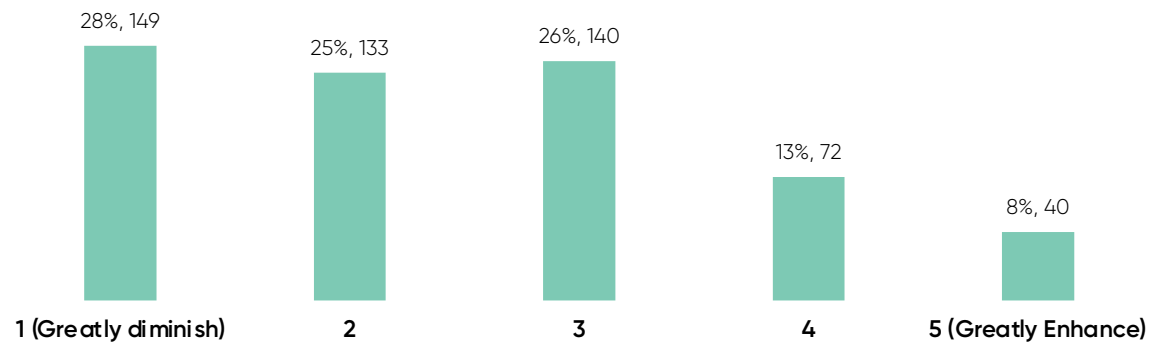
Tourism Dependency and Impact on Quality of Life

LIVELIHOOD DEPENDENT ON TOURISM



Approximately one-third of respondents do not depend on tourism as a significant contributor to their livelihood. However, among those who responded to the question, 20% heavily rely on the tourism industry as a vital part of their livelihood.

WOULD INCREASED VISITATION ENHANCE BIG SKY



The majority of respondents, comprising about three-quarters, expressed the belief that increased visitation would significantly reduce or create uncertainty about how it might improve the overall quality of life, economic opportunities, and local public services for Big Sky residents.

RESIDENT SENTIMENT

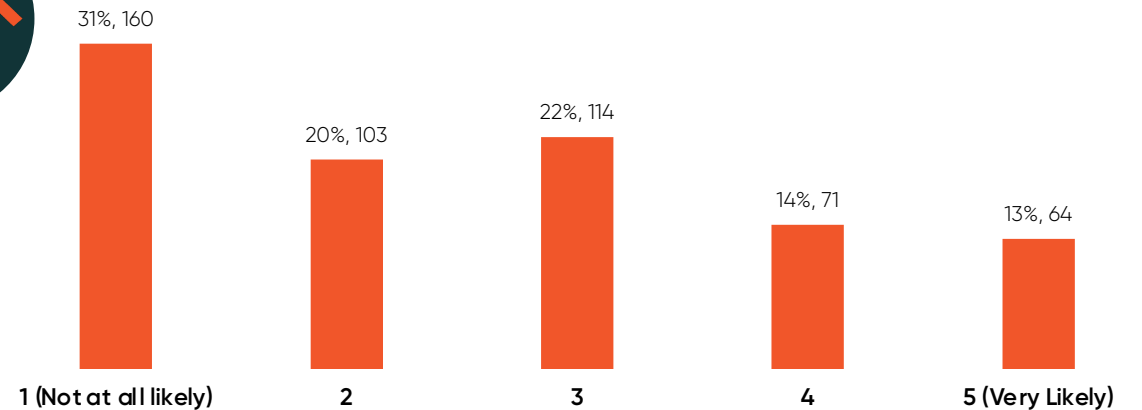
Respondent Recommendations

A majority of respondents are hesitant to recommend Big Sky as a place to live. Their reluctance is in line with concerns regarding affordability, escalating development, and a perceived lack of community engagement in planning, which collectively contribute to their reservations about recommending Big Sky as a residential destination.

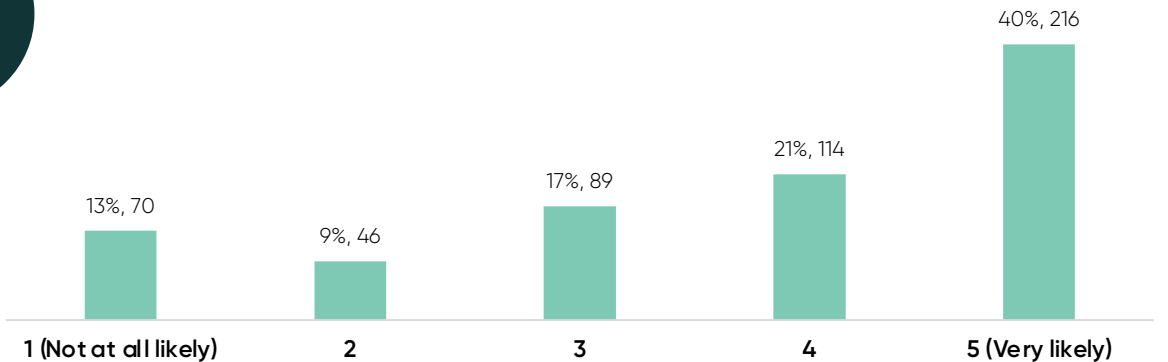
In contrast, the majority of respondents would readily recommend Big Sky as a place to visit. This concurs with their positive perceptions regarding the direction of tourism, emphasizing its capacity to boost the local economy, introduce new amenities, and enhance infrastructure.



LIKELIHOOD TO RECOMMEND BIG SKY TO LIVE



LIKELIHOOD TO RECOMMEND BIG SKY TO VISIT



04

TOURISM INDUSTRY

- VISION FOR THE FUTURE
- SUCCESSFUL GROWTH
- POSITIVE ASPECTS OF TOURISM
- LEADERS IN THE INDUSTRY

TOURISM INDUSTRY

Experiences That Inspire People to Visit Big Sky

Based on the responses for the top three attractions or activities that inspire people to visit Big Sky, it's clear that skiing is a highly enjoyed activity in the Big Sky area.



SKIING

Yellowstone National Park and its proximity are also prominent attractions.



YELLOWSTONE NATIONAL PARK

Fishing, hiking, and outdoor recreational activities are popular, as well as events like the Professional Bull Riding (PBR) and concerts.



FISHING

TOURISM INDUSTRY

Level of Tourism During the Seasons

STAY THE SAME

Respondents were asked what they perceived as a desired level of tourism during each season. Overall, respondents felt the amount of tourism should stay the same throughout all seasons.

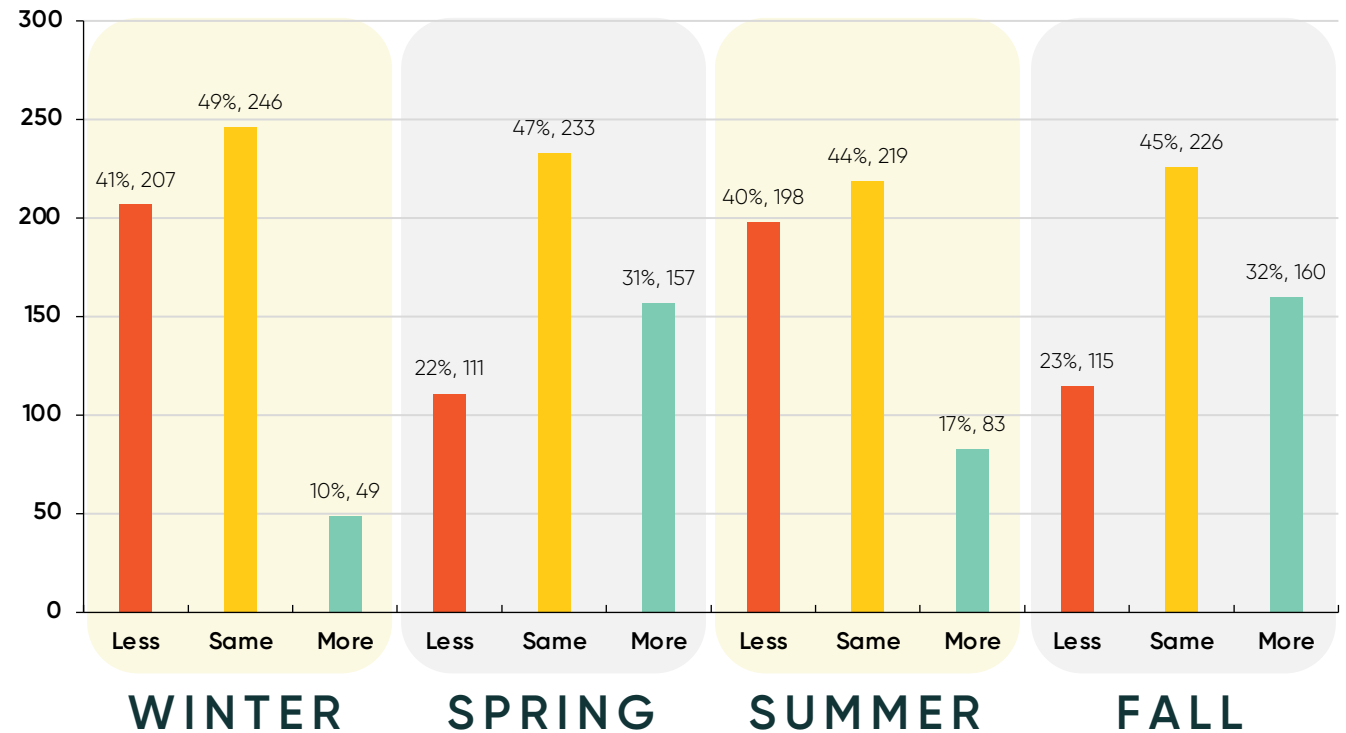
INCREASE

The seasons of Spring and Fall garnered the highest number of respondents who expressed a desire for increased tourism during those times.

DECREASE

The seasons of Winter and Summer received the most “less tourism” responses indicating a preference for reduced tourism during those periods.

DESIRED LEVEL OF TOURISM BY SEASON

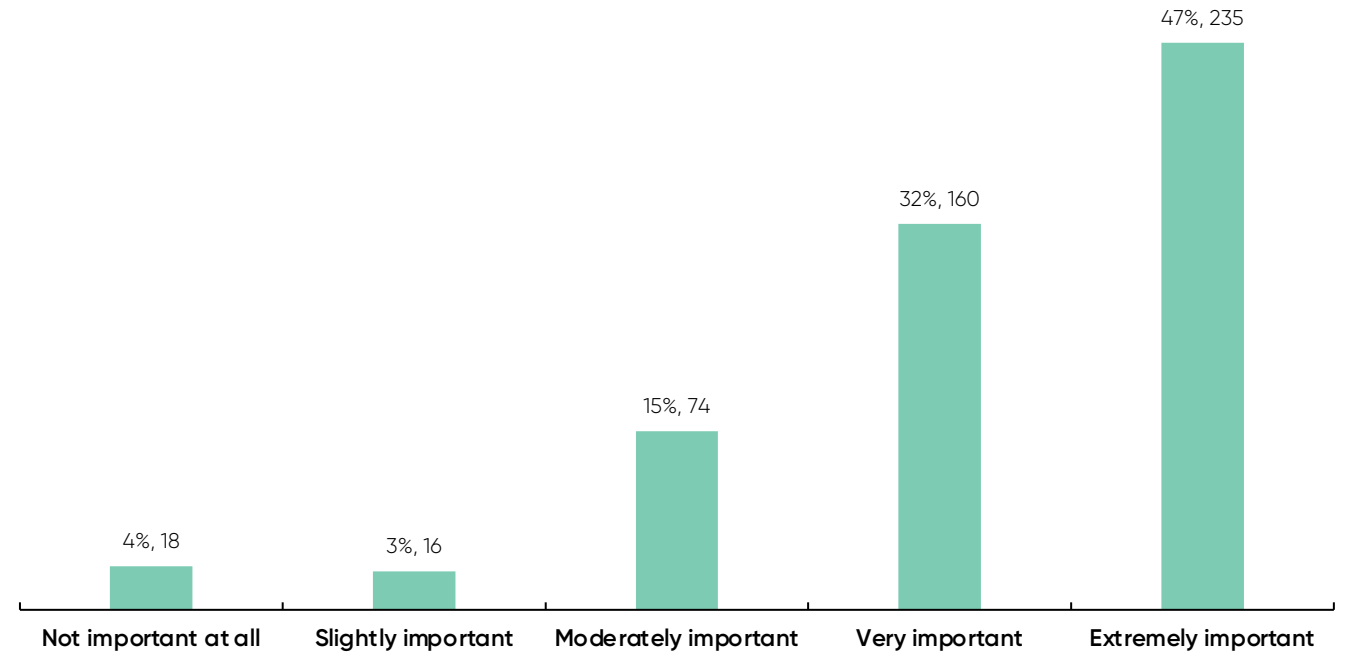


TOURISM INDUSTRY

Future Vision of Tourism

A significant majority (79%) of respondents considered having a shared vision for the future of tourism in Big Sky as very to extremely important. It's noteworthy that previous responses emphasized the need for increased resident involvement in the planning process.

IMPORTANCE OF SHARED VISION FOR TOURISM



TOURISM INDUSTRY

Future Success of Tourism Economy

Respondents believed that these factors would play a crucial role in shaping a prosperous future for Big Sky's tourism economy. In summary, a shared aspiration was evident in the desire to balance the requirements of tourists, residents, environmental considerations, and the economy in a sustainable manner.

HOUSING

- Affordable housing for the local workforce so they can live and work in Big Sky rather than commuting long distances. This was mentioned very frequently

INFRASTRUCTURE

- Sustainable infrastructure improvements to handle increased traffic, population growth, water usage, etc. without environmental damage
- Improved infrastructure like roads, transportation, parking, utilities and recreation facilities. Reduce traffic congestion.

BALANCE

- Balance between tourists, second homeowners, and full-time working residents
- Many expressed concerns about overcrowding from tourists displacing locals
- More economic diversity so tourism isn't the sole industry. Provide opportunities beyond low-paying service jobs

STABILITY

- Year-round economic vibrancy and sustainability, with less extreme seasonal peaks and closures
- Stabilize shoulder seasons
- Local businesses, especially restaurants, being able to remain open with adequate staffing. Higher wages to retain staff

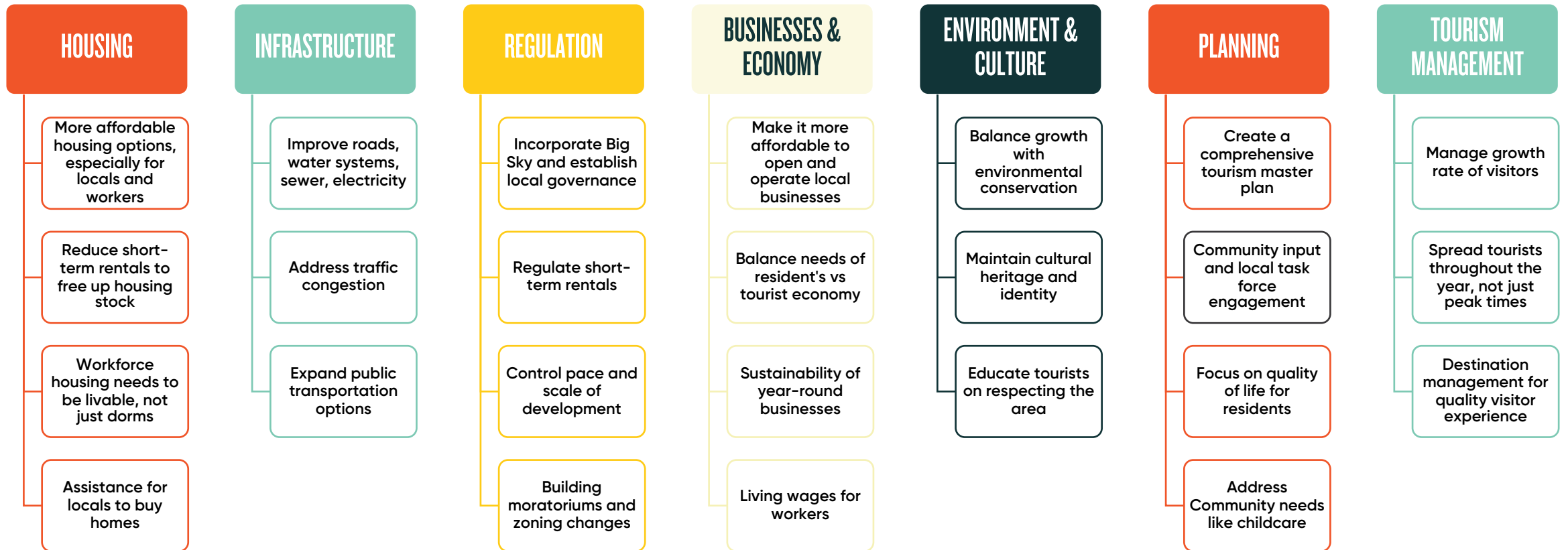
DEVELOPMENT

- More economic diversity so tourism isn't the sole industry. Provide opportunities beyond low-paying service jobs.
- Maintain unique character of Big Sky. Preserve outdoor spaces, culture, and community.
- Environmental conservation and sustainability. Minimize damage from development and crowds.

TOURISM INDUSTRY

Goals for Achieving Vision of Successful Tourism

In general, the prominent themes within the goals for realizing a vision of success for tourism in the coming 1 to 3 years appear to include managing the rate of growth, enhancing infrastructure, increasing the availability of affordable housing, granting residents a more significant role in governance, and harmonizing the expansion of tourism with the needs of the community. Numerous responses underscore sustainability and the enhancement of the quality of life for local residents.

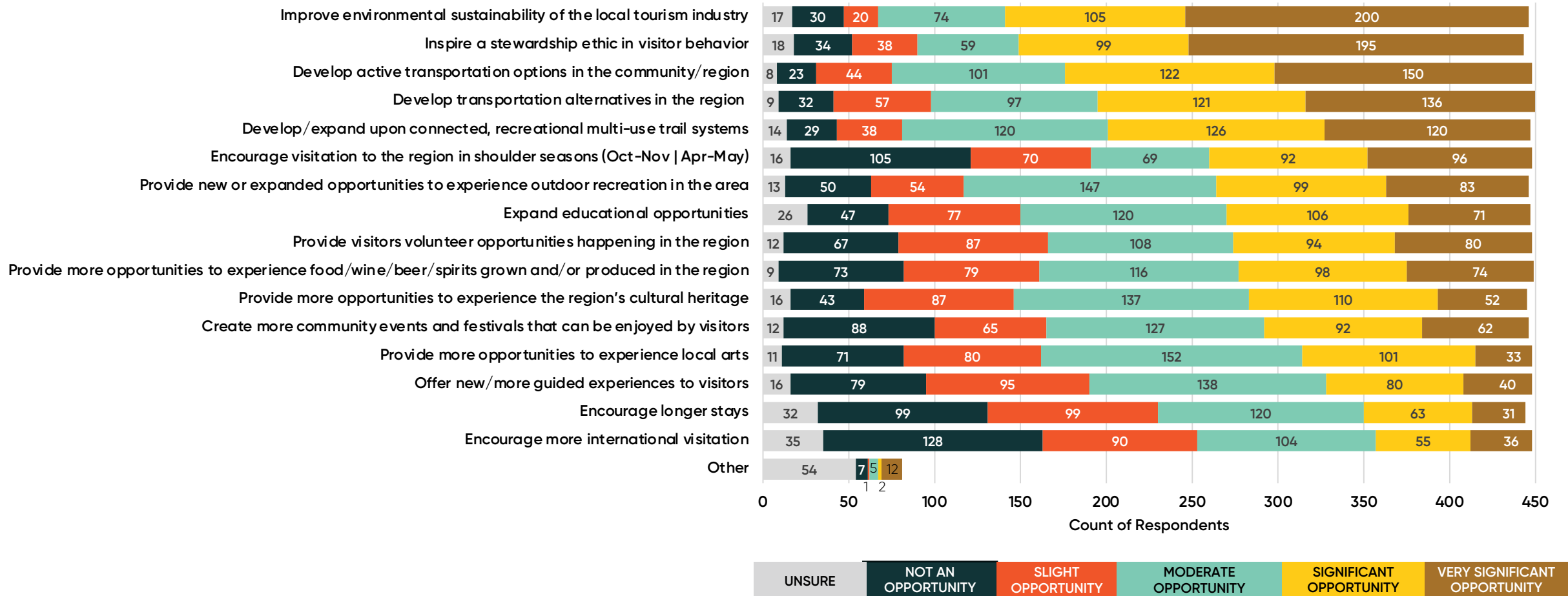


TOURISM INDUSTRY

Positive Impact of Tourism

One of the most crucial opportunities to enhance the positive impact of tourism is the enhancement of the environmental sustainability within the local tourism industry, with the aim of cultivating a sense of stewardship among visitors. On the other hand, respondents did not regard encouraging increased international visitation and longer visitor stays.

OPPORTUNITIES TO ADVANCE POSITIVE IMPACT OF TOURISM



TOURISM INDUSTRY

Challenges to Achieving Future Tourism Goals

The top three challenges respondents feel stand in the way for the community to realize these future tourism opportunities are:

GREED, MONEY, AND DEVELOPERS

Concerns related to the influence of developers, pursuits of profit-driven interests, and a lack of local governance featured prominently in the responses. The perception that some stakeholders prioritize profits over community well-being and sustainable development was a common theme.

LACK OF LOCAL GOVERNMENT OR GOVERNANCE

The absence of a local government or strong regulatory authority was frequently mentioned as a challenge in managing growth and ensuring sustainable development.

COMMUNITY RESISTANCE AND LOCAL ATTITUDES

There are concerns about locals' resistance to growth, development, and tourism, as well as issues related to community attitude, awareness, and buy-in for sustainability and stewardship efforts.

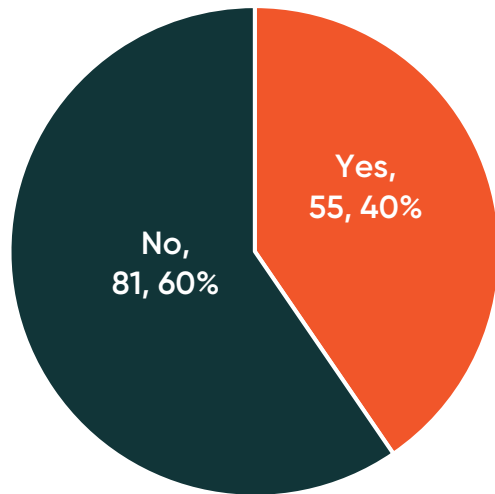


TOURISM INDUSTRY

Leaders in the Tourism Industry

Most notably, among the 40% of respondents who are business owners or managers, the top concerns revolved around affordable housing for their employees, staff recruitment, and retention. Additionally, there were noteworthy concerns regarding the health and well-being of their employees.

RESPONDENTS THAT ARE BUSINESS OWNERS/MANAGERS IN TOURISM



OWNER CONCERNS FOR BUSINESS FOR THE NEXT YEAR

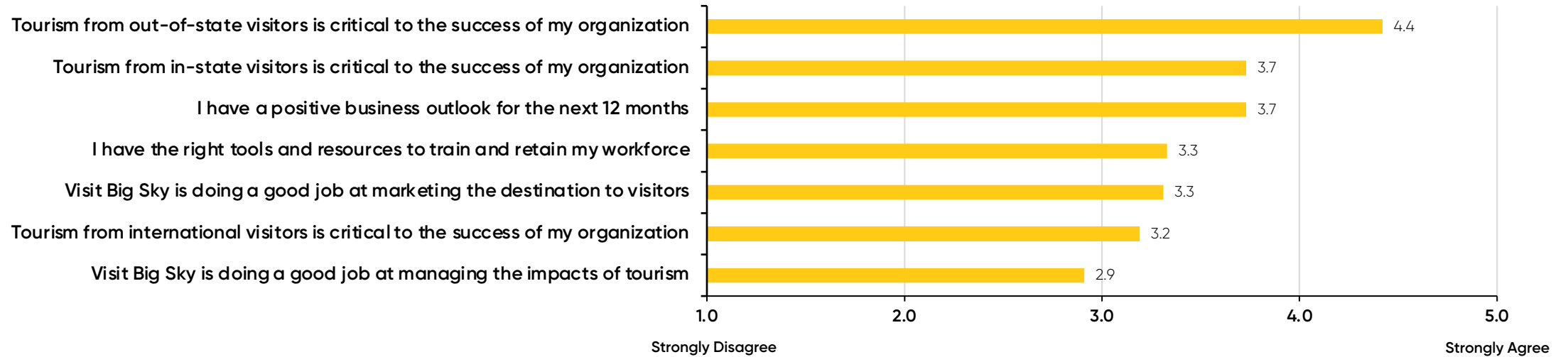


TOURISM INDUSTRY

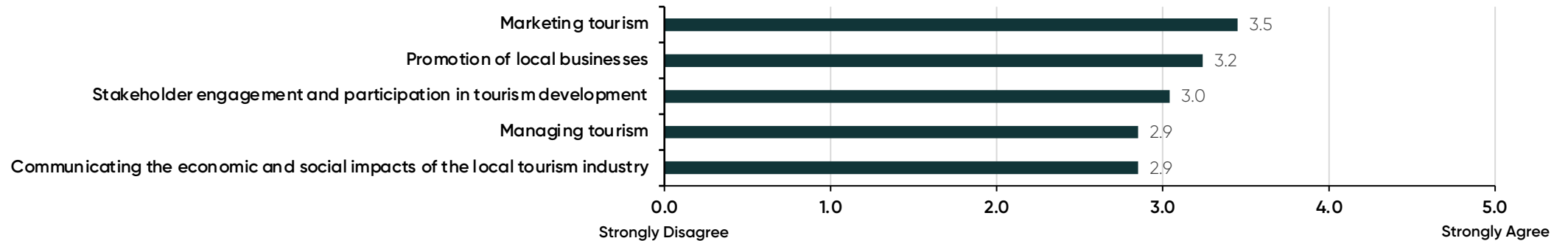
Tourism Impact on Quality of Business

Business owners and managers wholeheartedly recognize the pivotal role of out-of-state tourism in propelling their organizations to success, closely followed by in-state visitation. However, when it comes to the performance of Visit Big Sky in mitigating the effects of tourism, there's a slightly different tune in their opinions.

LEVEL OF AGREEMENT WITH TOURISM INDUSTRY STATEMENTS



AVERAGE AWARENESS OF VBS EFFORTS ON SCALE OF 1-5



TOURISM INDUSTRY

Overall Resident and Tourism Industry Stakeholder Sentiment

Overall, the sentiments seem predominantly **negative from long-time residents**, while **newer residents had more positive** perspectives. There is a shared concern across all groups that growth needs to be managed carefully to maintain quality of life, affordability, and the natural beauty of the area.

POSITIVE SENTIMENTS

- Appreciation for community events like farmers market, rodeo, festivals, concerts, etc.
- Praise for recent infrastructure improvements like the expanded grocery store, medical center, and trail systems.
- Gratitude for the survey and interest in resident opinions.
- Recognition of the economic benefits of tourism for the town.

MIXED SENTIMENTS

- Concerns about overcrowding, traffic, parking issues due to booming tourism.
- Desire for more amenities like restaurants, retail, activities balanced with keeping the small town charm.
- Challenges with affordable housing and living costs being driven up by tourism and development.
- Appreciation of tourism but feeling the growth has been too fast.

NEGATIVE SENTIMENTS

- Frustration with construction traffic congestion, road quality, and lack of infrastructure planning.
- Disappointment with loss of community feel and rise in cost of living.
- Anger about development plans catering to wealthy second homeowners over needs of full-time residents.
- Disapproval of short-term rentals impacting long-term rental availability.
- Criticism of overdevelopment, greed, and lack of environmental sustainability.

05

APPENDIX | REFERENCES

- SURVEY QUESTIONS
- COMPLETE SURVEY RESULTS

Appendix A: Survey Questions

Big Sky, MT – Resident and Tourism Industry Sentiment Survey

Welcome!

As part of our ongoing commitment to understanding and serving the needs of our residents and tourism industry stakeholders, we are excited to launch the Big Sky Resident and Tourism Industry Sentiment Survey.

Your unique perspective as a resident and/or tourism industry stakeholder is invaluable to us. You play a crucial role in shaping the future of Big Sky by sharing your thoughts, experiences, and opinions. Your insights will help us create a community that reflects the values of its residents.

We estimate this survey to take approximately **15 minutes** to complete. The survey will close on **Sunday, September 24, 2023**.

Please note that we do not ask for identifying information, as the survey is completely confidential. Reported results will be presented in aggregate, to ensure anonymity. However, if you consent to participating in the prize drawing, we'll ask for your contact information at the end of the survey.

Your survey responses will remain anonymous even if you enter the drawing to win a free pair of skis from Peak Ski Co.

This survey is being conducted by ECONorthwest and Crosscurrent Collective on behalf of Visit Big Sky. If you have any questions, please reach out to project lead:

Brad Niva, CEO
Visit Big Sky and Big Sky Chamber
Email: info@visitbigskymt.com

Thank you for your time and participation!

1) If you live in the community of Big Sky or surrounding area as shown in the study area map, which of the following best describes you? (select one)

- Year-round resident
- Part Time or Seasonal Resident
- I don't live within the study area

2) Please list the town/city of your primary residence:

3) How many months do you spend in Big Sky?

4) Please list the town/city of your primary residence:

- Belgrade
- Bozeman
- Ennis
- West Yellowstone
- Other (please specify):

5) What do you love about Big Sky? (open-ended)

6) If you are a long-term resident (greater than 5 years) of Big Sky, what factors have kept you living here? (select all that apply)

- Family and/or Friends
- Strong Community Relationships
- Career Opportunities
- Quality of Life
- Recreation Activities
- Arts and Cultural Experience
- Natural Beauty
- Sense of Home
- Other (please specify):

7) How frequently do you communicate with others in the Big Sky community?

- Daily
- Several times a week
- Once a week
- Several times a month
- Rarely or never

8) What are the primary methods of communication you use to interact with others in the Big Sky community? (select all that apply)

- Face-to-face conversations
- Phone calls
- Text messages
- Social media platforms (e.g., Facebook, Instagram, LinkedIn)
- Email
- In-person events
- Other (please specify):

9) Please rate: How important are the following factors to you and your community's quality of life in Big Sky?

- 1 (Not at all important)
- 2 (Not very important)
- 3 (Neutral)
- 4 (Important)
- 5 (Very important)

- Vibrant/lively community
- Safety and security
- Diversity of the community
- Family friendly
- Proximity to your workplace
- Economic opportunities
- Schools (Pre-K – 12)
- Availability of childcare/daycare
- Natural/scenic beauty
- Variety of retail shopping
- Variety of restaurants
- Access to locally grown food
- Affordability
- Outdoor activities
- Open spaces and trails
- Parks and recreation facilities and programs
- Small or local businesses
- Arts and cultural experiences

Entertainment/Concerts

Access and accessibility of public transportation

Other (specify below):

10) Please rate: how satisfied are you with the region's performance on these factors?

Same list as question 9

11) What are the most important local values you want to ensure Big Sky maintains as it develops over time? (open-ended)

12) On a scale of 1 (strongly disagree) to 5 (strongly agree), please rate the following statements:

Overall, I think tourism is good for Big Sky

Tourism is important to the local economy of Big Sky

The quality of public services has improved due to the tourism industry in Big Sky

Tourism development is happening too fast in Big Sky

Great change has occurred in Big Sky within the last decade

I feel good about the recent changes happening in Big Sky

13) Under the current circumstances, tourism in Big Sky is headed in the: (select one)

Right direction

Neither right or wrong – neutral

Wrong direction

No opinion

Other:

14) Based on your answer to the previous question, why do you feel that way? (open-ended)

15) Under the current circumstances, would increased visitation to Big Sky enhance or diminish the overall quality of life, economic opportunity, and local public services for Big Sky Residents?

1 (Greatly diminish)

2 (Diminish)

3 (Neutral)

4 (Enhance)

5 (Greatly enhance)

16) On a scale of 1-5, with 1 being not dependent and 5 very dependent, to what extent does your livelihood depend on tourism to Big Sky?

1 (Not at all dependent)

2 (Not very dependent)

3 (Neutral)

4 (Dependent)

5 (Very dependent)

17) How likely are you to recommend Big Sky as a place to visit?

1 (Not at all likely)

2 (Not very likely)

3 (Neutral)

4 (Likely)

5 (Very likely)

18) How likely are you to recommend Big Sky as a place to live?

- 1 (Not at all likely)
- 2 (Not very likely)
- 3 (Neutral)
- 4 (Likely)
- 5 (Very likely)

19) Please describe your level of agreement with the following statements regarding the tourism industry in Big Sky:

- 1 (Strongly disagree)
- 2 (Disagree)
- 3 (Neither agree nor disagree)
- 4 (Agree)
- 5 (Strongly Agree)
- NA

The community of Big Sky has become too dependent on tourism for sustaining the local economy

Attractions and recreational facilities are becoming overcrowded because of the number of visitors traveling to Big Sky

The growth of the tourism has negatively impacted livability

The resort tax that is collected on purchases adequately compensates for the intensity of use on our infrastructure and outdoor recreation areas

The tourism industry in Big Sky has a positive impact on local businesses

The growth of tourism is causing prices to rise, making things less affordable for residents

I have access to quality restaurants, events, and attractions because of the tourism dollars that support those activities in Big Sky

There are more recreational opportunities (places to go and things to do) because of tourism in Big Sky

The tourism industry values sustainability and the town's natural resources

The tourism industry is doing a good job of educating visitors on how to be responsible travelers

I would be willing to pay more taxes for local public services if it meant fewer visitors in the area

More regulations on short-term rentals are needed in Big Sky

20) In what ways do you believe the tourism industry can better align with the needs and desires of residents in Big Sky? (Open-ended)

21) In your opinion, what are the top three attractions or experiences that inspire people to visit Big Sky? (Open-ended)

22) Please rank the level of tourism you would like to see during the following seasons:

Less tourism

Same

More tourism

Winter:

Spring:

Summer:

Fall:

23) How important is it to have a shared vision for tourism in Big Sky? (select one)

- Extremely important
- Very important
- Moderately important
- Slightly important
- Not important

24) If planned effectively, what would a successful tourism economy look like and feel like in Big Sky in 15 years (2038)? Please be descriptive of what success would look like to you: (Open-ended)

25) What do you believe needs to be accomplished in the short term (in the next 1-3 years) in order to achieve this vision of success? (Open-ended)

26) From this list, what do you believe are the best opportunities to advance the positive impact of tourism in the region over the next 2-3 years?

Not an opportunity

Slight opportunity

Moderate opportunity

Significant opportunity

Very significant opportunity

Unsure

- Develop transportation alternatives in the region (transit, micro-transit, car share, etc.)
- Develop active transportation options in the community/region (bike paths, sidewalks, walking paths, safe crossing, etc.)
- Develop/expand upon connected, recreational multi-use trail systems
- Provide new or expanded opportunities to experience outdoor recreation in the area
- Provide more opportunities to experience food/wine/beer/spirits grown and/or produced in the region
- Provide more opportunities to experience local arts
- Provide more opportunities to experience the region's cultural heritage

- Create more community events and festivals that can be enjoyed by visitors
- Provide more opportunities for visitors to link up with service projects and volunteer opportunities happening in the region
- Offer new/more guided experience to visitors
- Expand educational opportunities (vocational for agritourism, instructional opportunities for outdoor recreation pursuits, etc.)
- Encourage longer stays
- Encourage visitation in the region in shoulder seasons (Oct-Nov | Apr-May)
- Encourage more international visitation
- Improve environmental sustainability of the local tourism industry
- Inspire a stewardship ethic in visitor behavior
- Other:

27) What top 3 challenges do you perceive may stand in the way for the community in realizing these opportunities?

28) How did you receive this survey?

- Through online outreach (notification via email)
- Through online outreach (notification via social media)
- Intercepted by someone on my trip
- At an event in Big Sky
- From a sandwich board in Big Sky
- Direct mailer
- Directly from a friend or family member
- Directly from a professional colleague
- Through my school
- Prefer not to answer
- Other (please specify):

29) What year were you born?

- Year: (four-digit number)
- Prefer not to answer

30) What is your gender? (select one)

- Female
- Male
- Not listed:
- Prefer not to answer

31) What is your annual household income?

- Less than \$20,000
- \$20,000 – \$59,999
- \$60,000 – \$99,999
- \$100,000 – \$149,999
- \$150,000 – \$249,999
- \$250,000 – \$500,000
- Greater than \$500,000
- Prefer not to answer

32) How would you identify your ethnic or racial background? (Select one)

- White/Caucasian
- Hispanic/Latinx

- Black/African American
- Asian/Pacific Islander
- American Indian or Alaska Native
- Two or more races
- Other:
- Prefer not to answer

33) Do you currently work in Big Sky?

- Yes
- No

34) How long have you worked in Big Sky?

- Months:
- Years:

35) Have you ever worked in Big Sky?

- Yes
- No

36) If you have previously worked in Big Sky, why did you stop? (Open-ended)

37) Do you work seasonally in Big Sky?

- Yes
- No

38) If you had the opportunity, would you like to work year-round in Big Sky?

- Yes
- No

39) Are you employed in the tourism industry?

- Yes
- No

40) What industry are you employed in?

- Management occupations
- Business and Financial Operations
- Health and Sciences
- Education
- Sales and Office Occupations

Natural Resources, Construction, and Maintenance Occupations

Other:

41) How long have you worked in the tourism industry? (in months or years)

- Months:
- Years:

42) Please indicate the sector(s) of the tourism economy in which you work: (select all that apply)

- Accommodation
- Arts and Creative
- Events and Entertainment
- Food and Beverage
- Outdoor Recreation
- Retail/Shopping
- Transportation
- Other (please specify):

43) Are you a business owner or manager in the tourism industry?

- Yes
- No

44) Which of the following are concerns for your business or organization over the next 12 months? (top 3)

- Retaining staff
- Hiring staff
- Staff reliability and work ethic
- Employee mental health and/or substance abuse
- Revenue shortfall
- Rising costs of supplies
- Housing costs for employees
- Visitor satisfaction with local attractions
- Resident sentiment and attitude towards tourism
- Increase in fuel prices
- Supply chain disruptions
- Business financing/refinancing

- Lack of parking
- Decrease in visitors of business revenue
- Adopting new technology/e-commerce
- Irresponsible visitation by guests
- Decreased consumer economic confidence
- Other:
- None of the above

45) Please describe your level of agreement with the following statements regarding the tourism industry in Big Sky.

1 (Strongly disagree)

2 (Disagree)

3 (Neither agree nor disagree)

4 (Agree)

5 (Strongly Agree)

NA

- I have a positive business outlook for the next 12 months
- I have the right tools and resources to train and retain my workforce
- Tourism from in-state visitors is crucial to the success of my organization

- Tourism from out of state visitors is critical to the success of my organization
- Visit Big Sky is doing a good job at managing the impacts of tourism
- Visit Big Sky is doing a good job at marketing the destination to visitors

46) On a scale from 1-5, how would you characterize your awareness of the efforts and initiative of Visit Big Sky? 1: Not at all aware – 5: Extremely aware

- Stakeholder engagement and participation in tourism development
- Communicating the economic and social impacts of the local tourism industry
- Promotion of local businesses
- Managing tourism
- Marketing tourism

47) Do you have any additional comments about the area, visitors and tourism, events, getting around town, and other aspects of community life that expand upon your responses to this survey? (Open-ended)

48) Would you be interested in entering a drawing for a free pair of skis from Peak Ski Co. for participating in the survey? Your survey responses will remain anonymous.

- Yes
- No

49) Please enter your contact information below. A winner will be selected within two weeks of the survey closing. Visit Big Sky will reach out if you are a winner.

- Name:
- Email Address:
- Phone Number:

Thank you for taking the time to share your perspective and insights!

If you have questions, you can contact Visit Big Sky at:

Brad Niva, CEO

Visit Big Sky and Big Sky Chamber

Email: info@visitbigskymt.com

SURVEY RESULTS

The table lists all questions in the survey with the total respondents that answered, the total respondents that skipped, and the percent of respondents that completed the question.

Some questions contained logic, which allowed respondents to answer additional questions given their answer to the previous question. These questions are noted with an L after the question number.

See the next slide for the trend in completion of the questions.

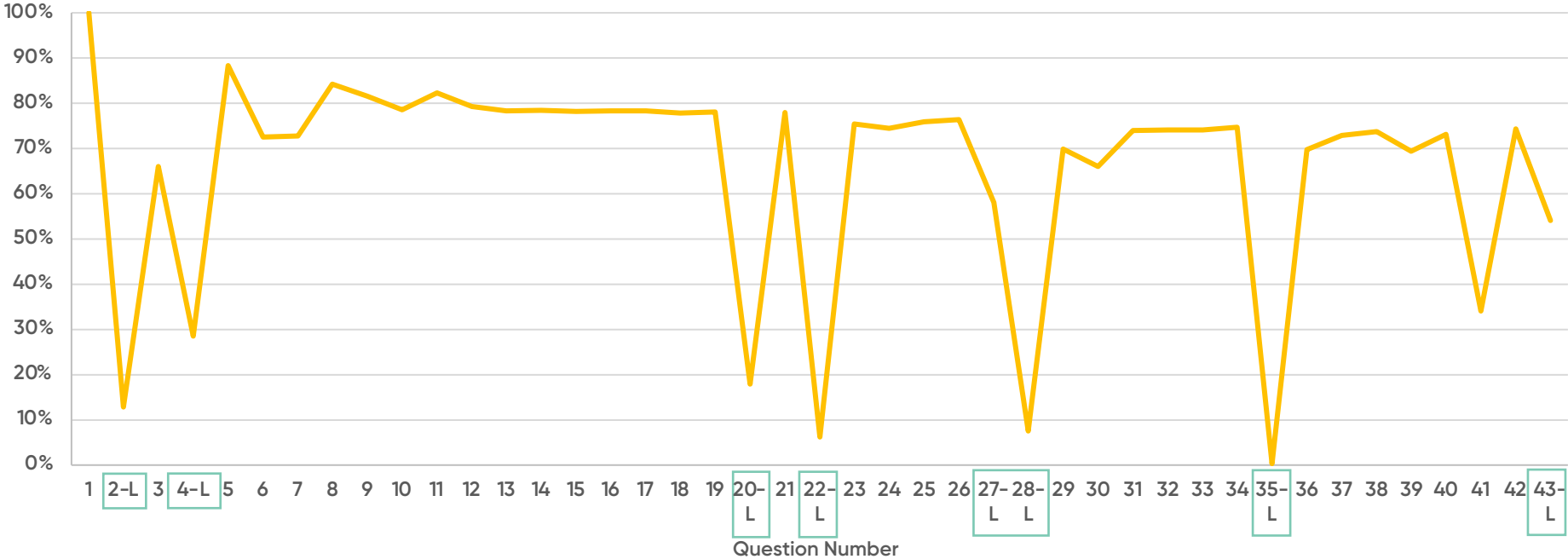
	Question	Answered	Skipped	% Completed
1	Was Big Sky the primary or only destination for this trip?	1640	0	100%
2-L	What was your primary destination?	210	1430	13%
3	Where else did you/will you travel on this trip?	1082	558	66%
4-L	If you are traveling to other places in Montana, what other towns will you visit? (skip if not traveling anywhere else in Montana)	467	1173	28%
5	Which of the following best describes your visit to Big Sky:	1448	192	88%
6	How many nights? (type exact numbers)	1189	451	73%
7	Which of the following forms of accommodation are you using during your current or most recent visit? (Select all that apply)	1193	447	73%
8	How many times have you visited Big Sky in the past 3 years, including your most recent visit?	1382	258	84%
9	How many people were in your group that traveled to Big Sky during your visit?	1338	302	82%
10	How many members of your travel party would you consider:	1289	351	79%
11	What season(s) did you visit Big Sky during the last 3 years? (Select all that apply)	1349	291	82%
12	How long before your current or most recent visit to Montana did you:	1300	340	79%
13	Before visiting Big Sky, which tools did you use to help you plan? (Select all that apply)	1284	356	78%
14	How did you travel to Big Sky during your visit? (Select all that apply)	1286	354	78%
15	For accommodations?	1282	358	78%
16	For activities?	1285	355	78%
17	For dining?	1285	355	78%
18	Which of the following activities have you participated in while in Big Sky? (Select all that apply)	1277	363	78%
19	Were any of these activities a new experience for you during your visit to Big Sky?	1281	359	78%
20-L	Which activities were a new experience? (Select all that apply)	294	1346	18%
21	Did you receive a wellness or spa treatment during your visit to Big Sky?	1278	362	78%
22-L	What kind of treatment and where?	102	1538	6%
23	What natural areas, trails, open spaces or parks did you visit while on this trip? (Select all that apply)	1236	404	75%
24	What was your primary motivator for your visit to Big Sky?	1221	419	74%
25	On a Scale of 1-5, where 1 is not at all important and 5 is very important, how important were the following factors in motivating your decision to visit Big Sky?	1245	395	76%
26	In general, did Big Sky meet your expectations?	1253	387	76%
27-L	Why?	952	688	58%
28-L	Why not?	123	1517	8%
29	What did you enjoy most about your visit to Big Sky?	1146	494	70%
30	What would have improved your visit to Big Sky?	1082	558	66%
31	Which of the following would most likely prevent you from returning to Big Sky in the future? (Select all that apply)	1214	426	74%
32	On a scale of 1-5, how likely are you to visit Big Sky again in the next two years?	1215	425	74%
33	How did you receive this survey?	1216	424	74%
34	Do you live in the U.S?	1225	415	75%
35-L	What country do you live in?	5	1635	0%
36	What is the zipcode of your primary residence?	1143	497	70%
37	What is your annual household income?	1195	445	73%
38	What is your gender?	1210	430	74%
39	What year were you born?	1139	501	69%
40	How would you identify your ethnic or racial background? (Select one)	1200	440	73%
41	Do you have any additional comments about the area or your experience in Big Sky that you'd like to share?	558	1082	34%
42	Would you be interested in entering a drawing for a free pair of skis from Peak Ski Co. for participating in the survey? Your survey responses will remain anonymous.	1220	420	74%
43-L	Please enter your contact information below. A winner will be selected within two weeks of the survey closing. Visit Big Sky will reach out if you are a winner.	887	753	54%

SURVEY RESULTS

75%

After removing the questions containing logic, the average percent of questions completed by respondents was 75%.

Percent of Completed Questions





THANKS

For questions or more information about this study please contact:

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