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BIG SKY MONTANA

VISITOR, RESIDENT + STAKEHOLDER RESEARCH

December 2023





VISITOR:
HAS VISITED BIG
SKY IN THE PAST
TWO YEARS

RESIDENT:
LIVES IN BIG SKY
AREA PART-TIME
OR YEAR-ROUND

STAKEHOLDER:
WORKS OR HAS
WORKED IN
THE TOURISM
INDUSTRY IN BIG
SKY

PURPOSE

VISITOR, RESIDENT, AND TOURISM INDUSTRY STAKEHOLDERS

This report 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 visitors, residents, and stakeholders in the tourism industry regarding their experiences and perceptions of visiting, living, or working in the broader Big Sky region. The survey results will play a crucial role in shaping Visit Big Sky's destination management strategy, enabling them to leverage opportunities and enhance the experiences of residents.

STRATEGY

DRIVING TOWARD A SUCCESSFUL TOURISM STRATEGY

The results of each survey will influence the six impact areas Visit Big Sky has identified as important to develop in order to drive toward a successful tourism strategy. These impact areas are:

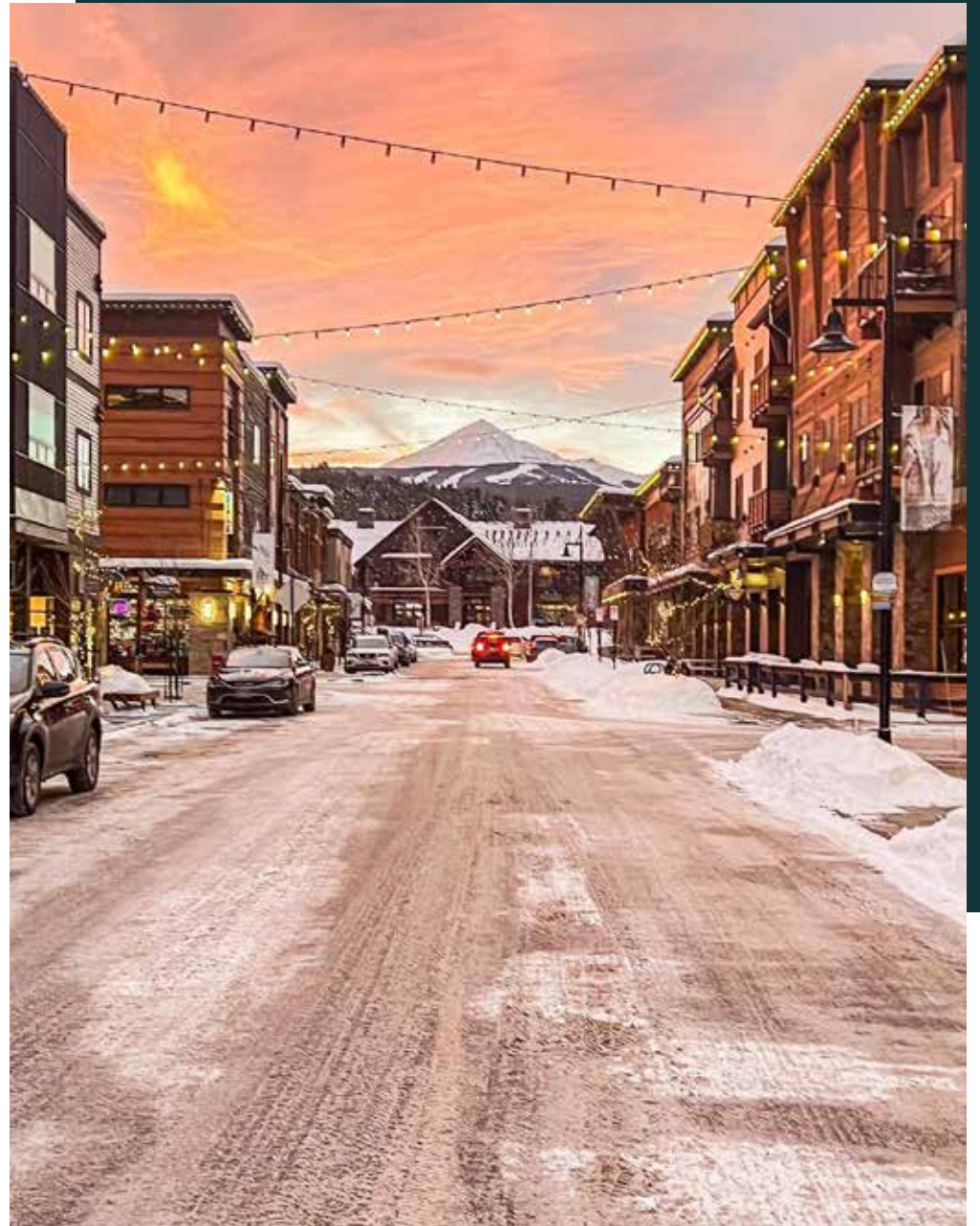
- **EVOLVE THE OUTDOOR RECREATIONAL EXPERIENCE – CONNECT MULTI-MODAL TRAIL SYSTEMS**
- **SUPPORT BIG SKY'S TOURISM WORKFORCE**
- **IMPROVE THE ENVIRONMENTAL SUSTAINABILITY OF THE INDUSTRY – CLIMATE ACTION**
- **SHOULDER SEASON DEVELOPMENT**
- **RECONNECT AND CULTIVATE A SENSE OF PLACE**
- **IMPROVE TRANSPORTATION – ACTIVE TRANSPORTATION + TRANSPORTATION ALTERNATIVES**

INTRODUCTION

SURVEY DESIGN AND METHODOLOGY

EONorthwest and Crosscurrent Collective in collaboration with Visit Big Sky and its project advisory team, formulated a concise set of survey questions aimed at pinpointing the most relevant factors influencing the sentiments of residents, visitors, and stakeholders in the tourism industry. These insights serve as vital inputs for shaping Visit Big Sky's tourism strategy, including creating a shared vision of success, integrating suggestions to shape the future of tourism in Big Sky, and identifying strategies to improve the visitor experience while enhancing a strong sense of place for residents and the community of Big Sky.

“A successful tourism destination is one where the visitor leaves only their footprints.” – Toni Neumeister





01

VISITATION SUMMARY

Highlights and key results of the visitor survey

VISITOR SURVEY RESULTS

TOTAL NUMBER OF RESPONDENTS

The survey opened to the public on August 15, 2023 and closed on September 24, 2023. In total, there were 1,640 responses collected in the six weeks the survey was open. Of those total responses, 1,220 surveys were fully completed, 128 were mostly complete, 128 were partially complete and 270 were incomplete, having answered one to six questions. The prize drawing captured 902 interested respondents who consented to sharing their contact information.



WHERE RESPONDENTS LIVE

Of the 1,640 respondents, 1,127 answered yes to living in the US, and 8 listed being an International visitor. The international visitors that listed the country of their home residence were UK (2), Canada (1), and Italy (1).

Most survey respondents live in Minnesota (135), Montana (127), and California (123).



VISITOR EXPERIENCE

PRIMARY MOTIVATOR FOR VISITING

Skiing is by far the most common motivator for visiting Big Sky, followed by being with family, and visiting family and friends. Being in nature and engaging in outdoor activities were also significant motivators for visiting Big Sky.

There were mentions of various other motivators, indicating the diverse reasons people visit Big Sky. Primarily, people want a place where they can enjoy their favorite activities with friends and family while experiencing the scenic landscape and feeling connected to nature.



IMPORTANCE FACTORS

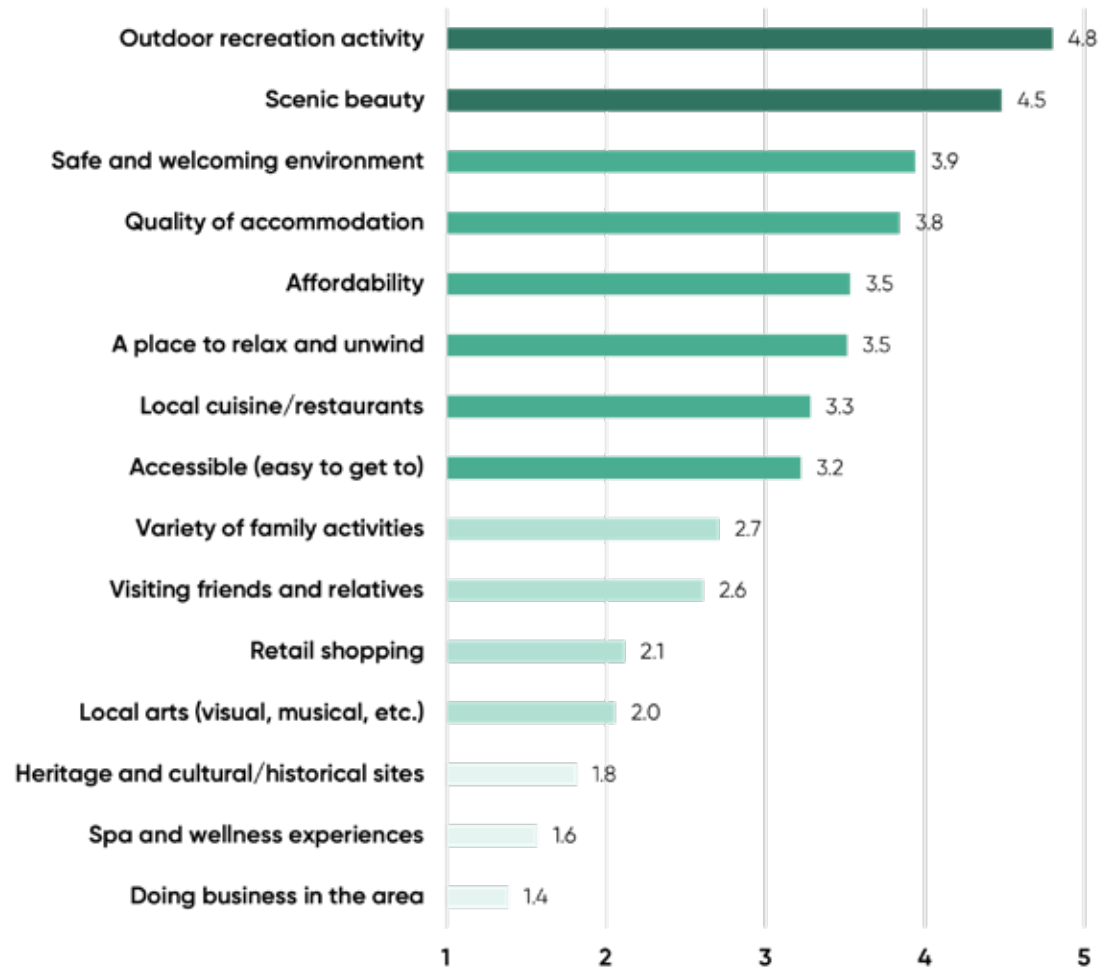
FACTORS OF IMPORTANCE FOR VISITING

Respondents rated outdoor recreation activities as the most important factor for visiting, indicating a strong desire for engaging in recreational pursuits such as skiing, snowboarding, hiking, and mountain biking.

The visual appeal of Big Sky's scenic landscapes holds great significance (rated 4.5 on average), suggesting that individuals are drawn to the breathtaking and picturesque surroundings.

A safe and welcoming environment was rated among the top 3 factors, indicating visitors value a sense of safety and a warm, friendly atmosphere.

IMPORTANCE OF FACTORS FOR VISITING



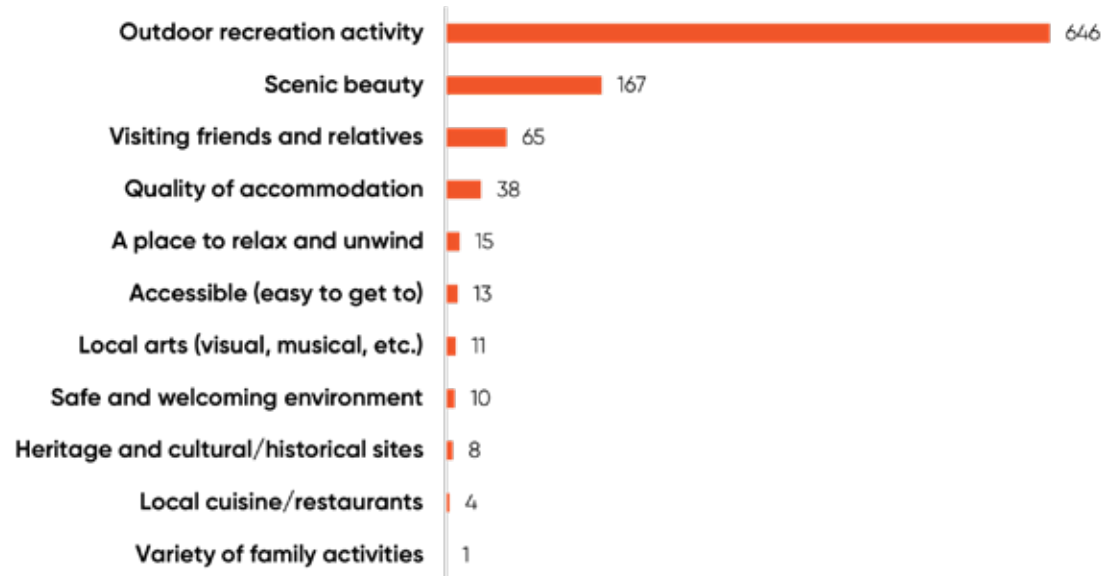
VISITOR EXPERIENCE

ENJOYED EXPERIENCE ALIGNMENT WITH FACTORS OF IMPORTANCE

The most enjoyable experiences were categorized based on factors critical for visitation, allowing for the identification of patterns in the relationship between importance and satisfaction of these factors. The most enjoyable experiences were found to align with three factors of importance for visitation:

- **OUTDOOR RECREATIONAL ACTIVITIES**
- **SCENIC BEAUTY**
- **VISITING FRIENDS AND RELATIVES**

ENJOYED EXPERIENCES BY FACTORS OF IMPORTANCE FOR VISITATION



VISITOR EXPERIENCE

MOST ENJOYED EXPERIENCES

These highly enjoyable experiences were derived from qualitative responses, ranked in order from most frequently mentioned to least. Skiing overwhelmingly stood out with approximately 474 mentions. Scenery, family time, and outdoor activities were consistently highlighted as the top attractions in visitor survey responses.



SKIING

474 Mentions



SCENERY

89 Mentions



FAMILY TIME

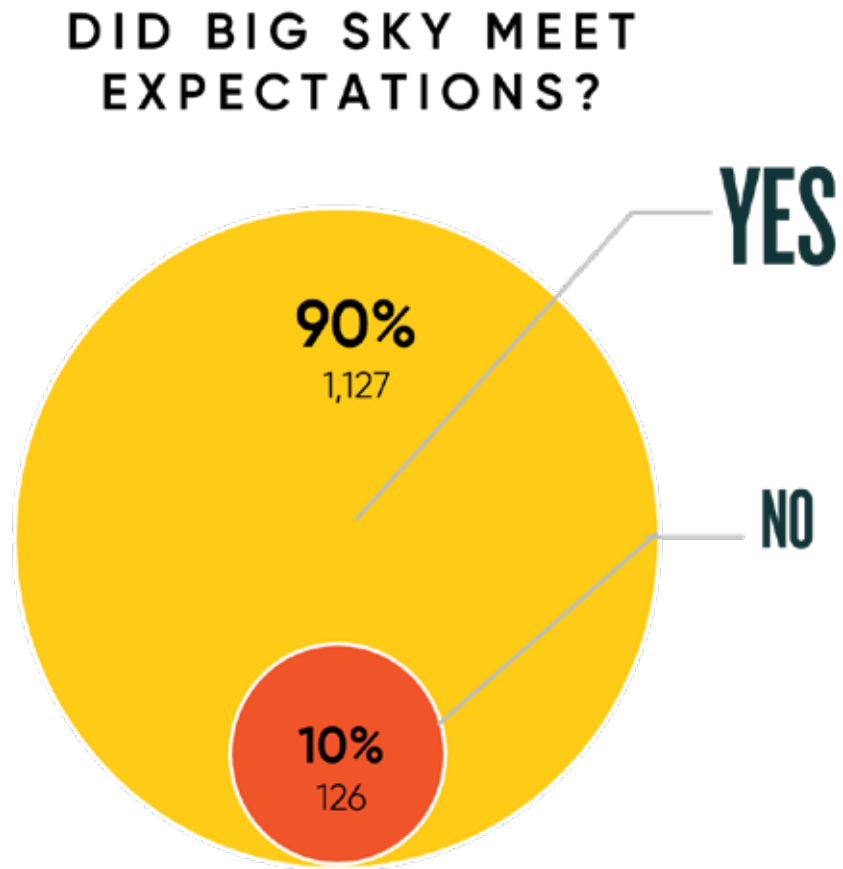
65 Mentions



OUTDOOR ACTIVITIES

62 Mentions

DID BIG SKY MEET VISITOR EXPECTATIONS?



WHY OR WHY NOT?

WHY BIG SKY DID MEET EXPECTATIONS

1 | SKIING EXCELLENCE

Visitors consistently praised Big Sky for its great skiing, vast skiable terrain, and varied options for all skill levels. They appreciated the quality of the mountain and services. The mountain's expansive and well-maintained ski terrain was a highlight.

2 | BEAUTIFUL SCENERY

The natural beauty and gorgeous scenery in and around Big Sky, particularly during the skiing season, were highly appreciated. Many visitors mentioned breathtaking landscapes and the beauty of the area.

3 | SMALL TOWN CHARM AND WELCOMING COMMUNITY

Some visitors liked the small-town atmosphere and the sense of community in Big Sky. They appreciated the friendly people and local establishments, and the fact that Big Sky was less crowded compared to other ski resorts.

4 | ACCESSIBILITY

Big Sky's accessibility, especially from nearby airports like Bozeman, made it a convenient destination for many visitors. Being able to get there easily was mentioned as a positive aspect.

5 | VARIETY OF ACTIVITIES

Many visitors mentioned that they enjoyed a range of activities beyond skiing, from hiking and outdoor adventures to dining and entertainment.

WHY BIG SKY DID NOT MEET EXPECTATIONS

1 | HIGH COST

Many visitors expressed disappointment with the high cost of various aspects of their Big Sky experience, including lift tickets, accommodations, dining, and transportation.

2 | OVERCROWDING

A significant number of visitors noted issues with overcrowding, long lift lines, and the resort becoming too exclusive.

3 | LIMITED DINING OPTIONS

Guests mentioned a lack of dining options on the mountain, difficulty making reservations, and high restaurant prices.

4 | INADEQUATE INFRASTRUCTURE AND SERVICES

Visitors noted a lack of infrastructure to support the growing number of visitors, including limited dining options, not enough bathrooms, and poorly maintained roads.

5 | CHANGES IN ATMOSPHERE

Some visitors felt that the atmosphere at Big Sky had changed over the years, becoming less welcoming to families, locals, and those seeking a more affordable ski experience.

POSITIVE SENTIMENTS

- Appreciation of the natural beauty and scenic landscapes.
- Enjoyment of skiing and outdoor activities.
- Recognition of friendly and helpful people.
- Praise for improvements in lifts and terrain.
- Satisfaction with specific amenities like heated chairlifts.
- Love for the area and location.

NEUTRAL SENTIMENTS

- Some visitors understand the need for development and growth, while others express concerns about overdevelopment, crowding, and loss of the area's charm. There are mixed opinions about Big Sky's direction and leadership.
- While some visitors appreciate the developments in Big Sky, others worry about the negative impacts of growth, suggesting that the "horse is out of the barn" and that growth could harm the overall experience.

NEGATIVE SENTIMENTS

- Frustration with the high cost and affordability issues, especially for lift tickets, accommodations, and dining.
- Concerns about overcrowding, long lift lines, and limited dining options.
- Calls for better infrastructure and services, such as roads, parking, and restroom facilities.
- Desire for more environmentally conscious practices and sustainable operations.
- Concerns about the impact of growth and development on the resort's character and natural beauty.
- Calls for fair treatment of employees and better support for the workforce.
- Criticisms related to access and transportation, including high transportation costs.
- Dissatisfaction with the lack of discounts for returning customers.
- Worries about the resort becoming too commercialized or exclusive.

RETURN VISIT

REASONS TO RETURN OR PREVENT A RETURN VISIT

Most respondents (**56%**) indicated they would be **very likely to return** to Big Sky within two years. Only 14% reported unlikely or not at all likely.

Among the factors that could discourage a return visit to Big Sky, **finances** were the most commonly cited, accounting for 21% of all reasons indicated by respondents who answered this question.

Additionally, ranking among the foremost reasons deterring a return visit are the **significant crowds** at popular ski lifts and the **insufficiency of facilities** to accommodate the volume of visitors.

The “Other” open-ended responses consisted of highly specific statements that closely aligned with the primary factor deterring a return visit: the perception that Big Sky was prohibitively expensive and lacked a sufficient range of affordable alternatives.

OVERALL VISITOR EXPERIENCE

STRATEGIES FOR POSITIVE EXPERIENCE

The visitor experiences, both positive and negative, gleaned from these survey results have aided Visit Big Sky in understanding how they align with the six impact areas for successful tourism and how to deliver the sought-after visitor experience.

In section three, we will utilize the visitor responses to support the six identified strategies and explore how these perceptions compare to those of residents and tourism industry stakeholders, highlighting both similarities and differences.



02

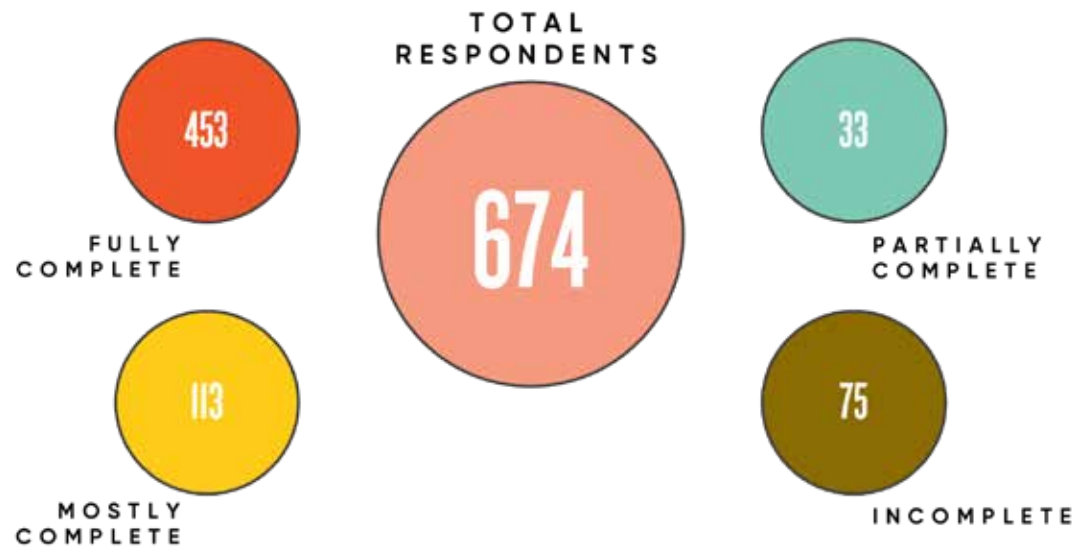
RESIDENT AND STAKEHOLDER SUMMARY

Highlights and key results of the resident and tourism industry stakeholder survey

RESIDENT & STAKEHOLDER SURVEY RESULTS

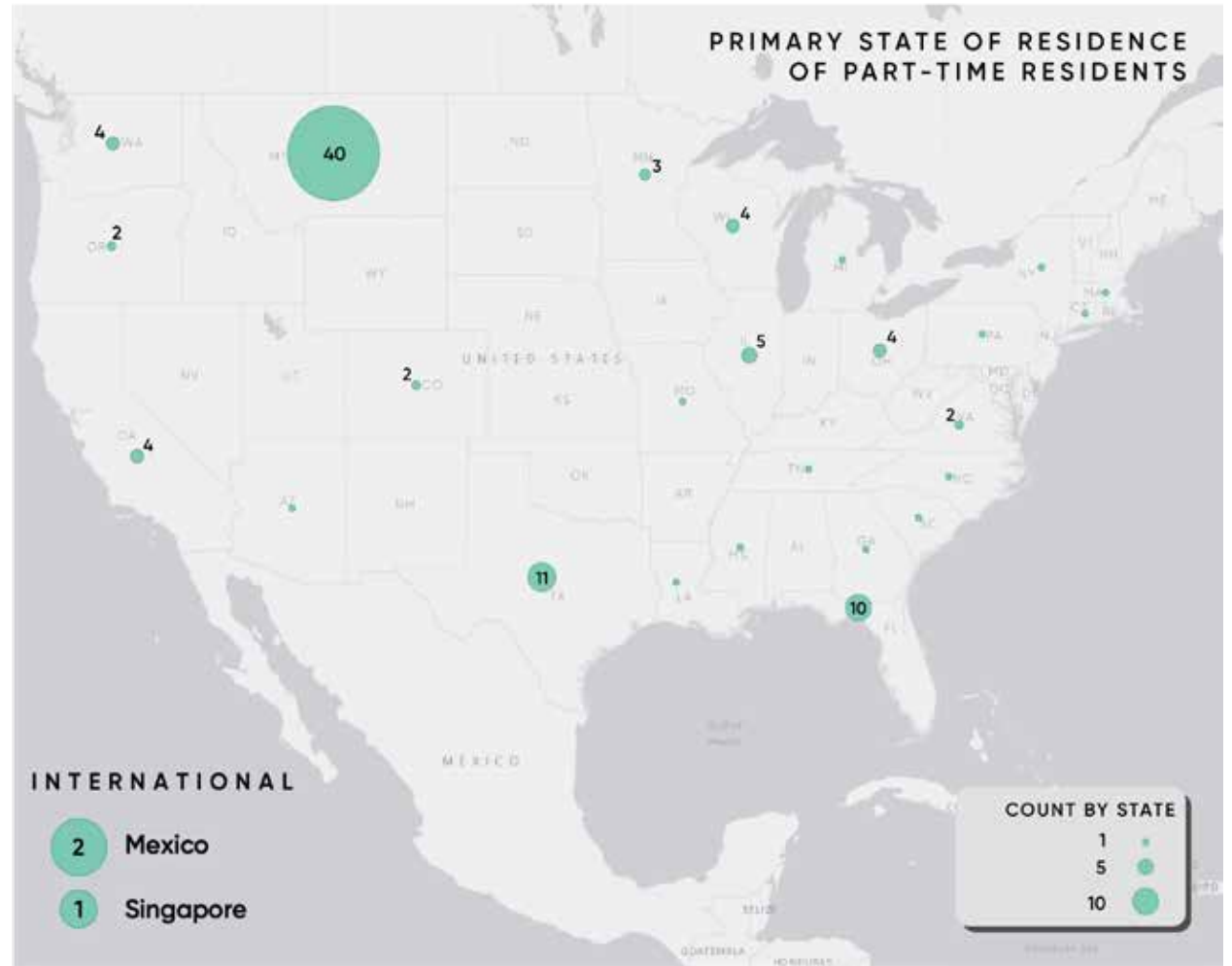
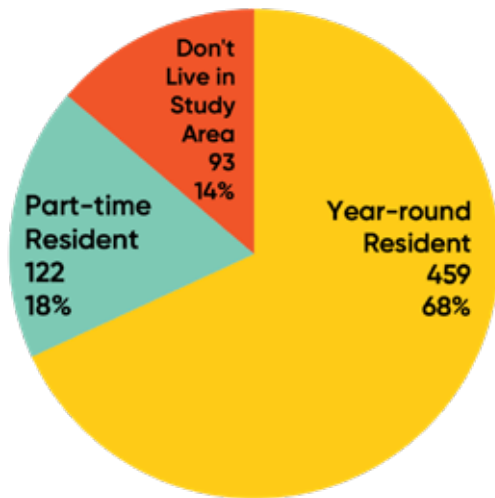
TOTAL NUMBER OF RESPONDENTS

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 who consented to sharing their contact information.



TYPE OF RESIDENT

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. Part-time residents typically spend three-to-six months in Big Sky.



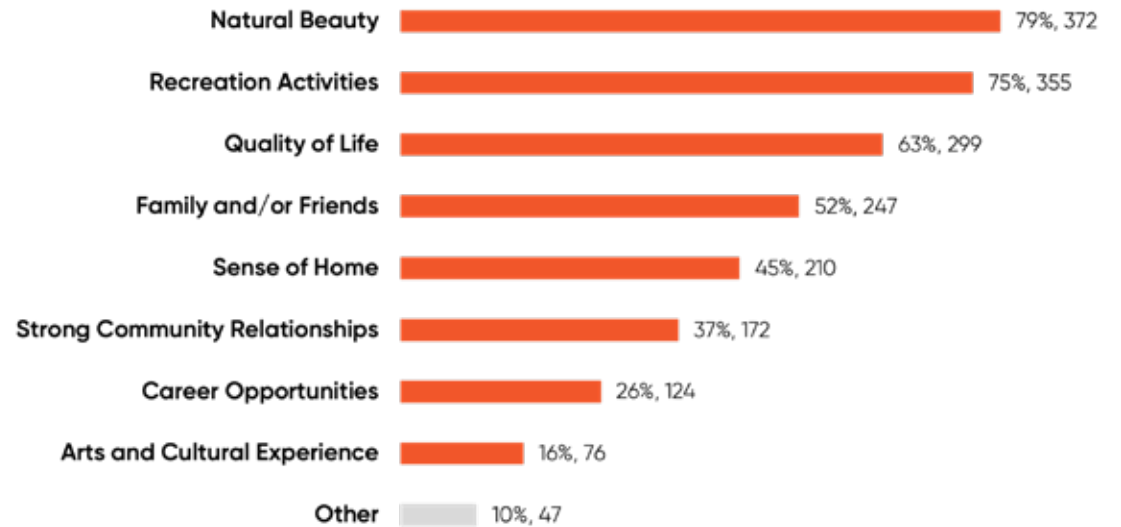
RESIDENT SENTIMENT

FOR THE LOVE OF BIG SKY

When respondents were asked 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.

1. NATURAL BEAUTY AND SCENERY
2. OUTDOOR RECREATION ACTIVITIES
3. SENSE OF COMMUNITY | QUALITY OF LIFE

FACTORS KEEPING RESIDENTS LIVING IN BIG SKY



WHY RESIDENTS LOVE BIG SKY

"Skiing, biking, living in the greater Yellowstone ecosystem and everything that comes with it."

"I love the small community. I love how BSCO and the arts counsel do all these amazing different things to bring this community together."

"The people, kindness, commitment to the environment."

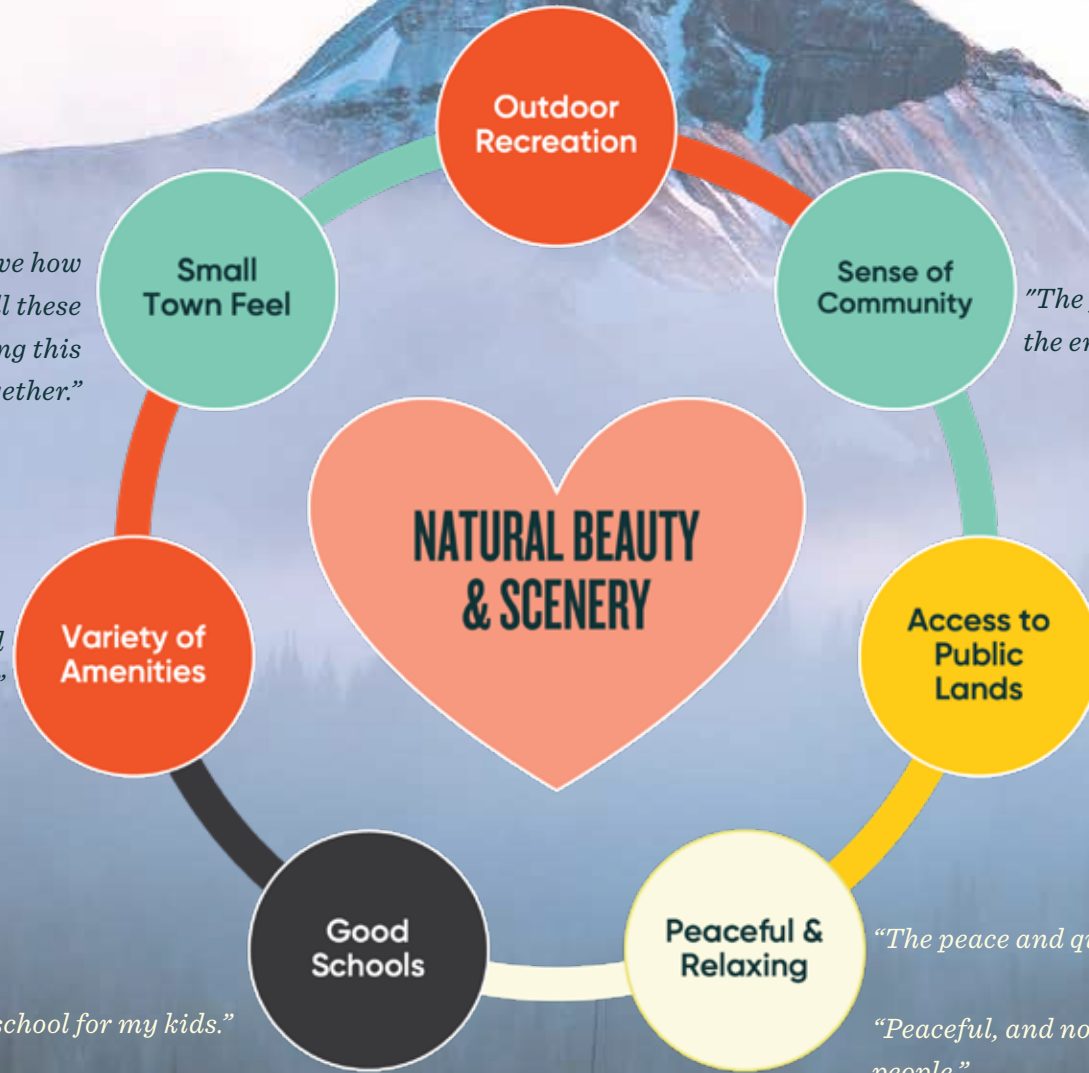
"Good restaurants and summertime events."

"Access to wilderness and trails."

"The peace and quiet."

"Ophir school for my kids."

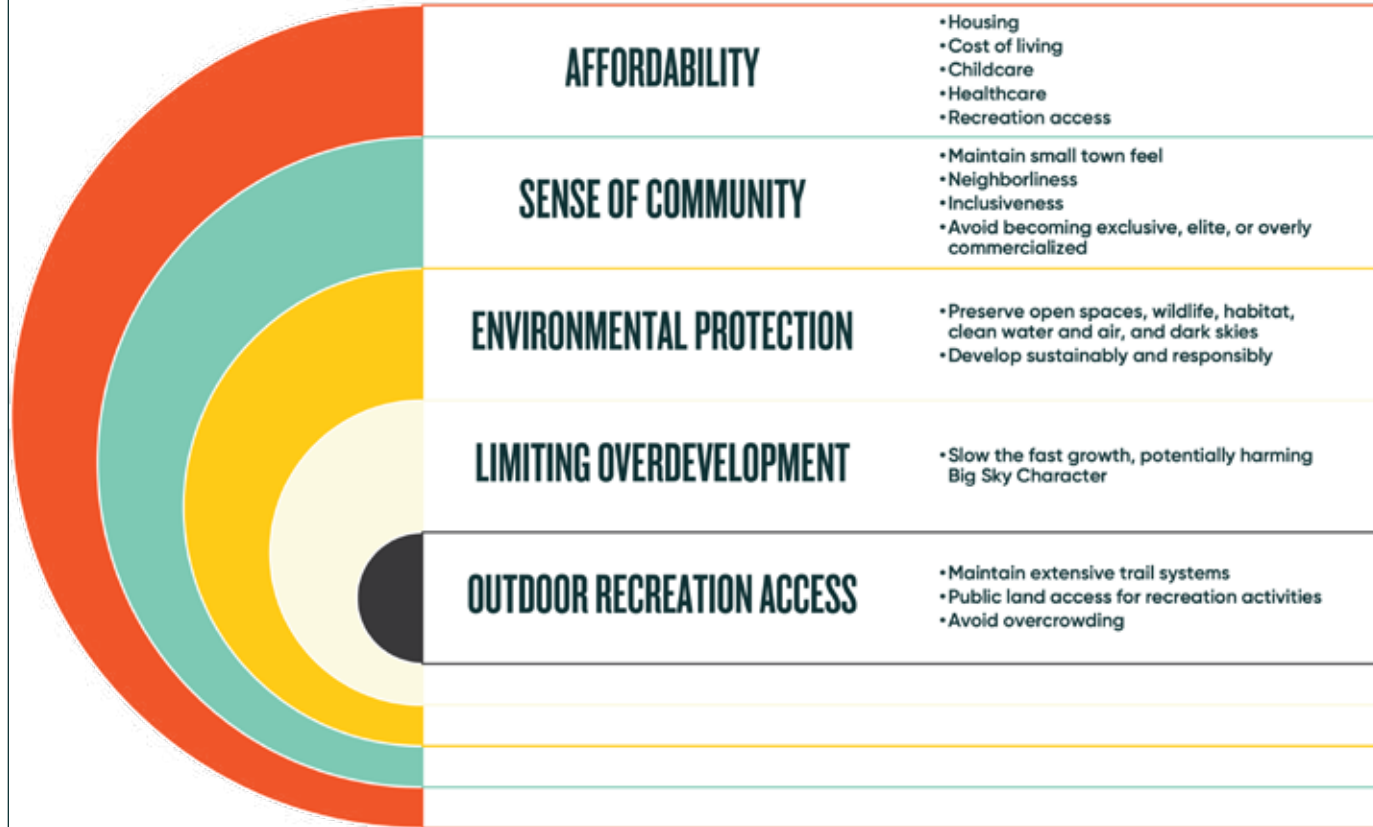
"Peaceful, and not too many people."



RESIDENT SENTIMENT

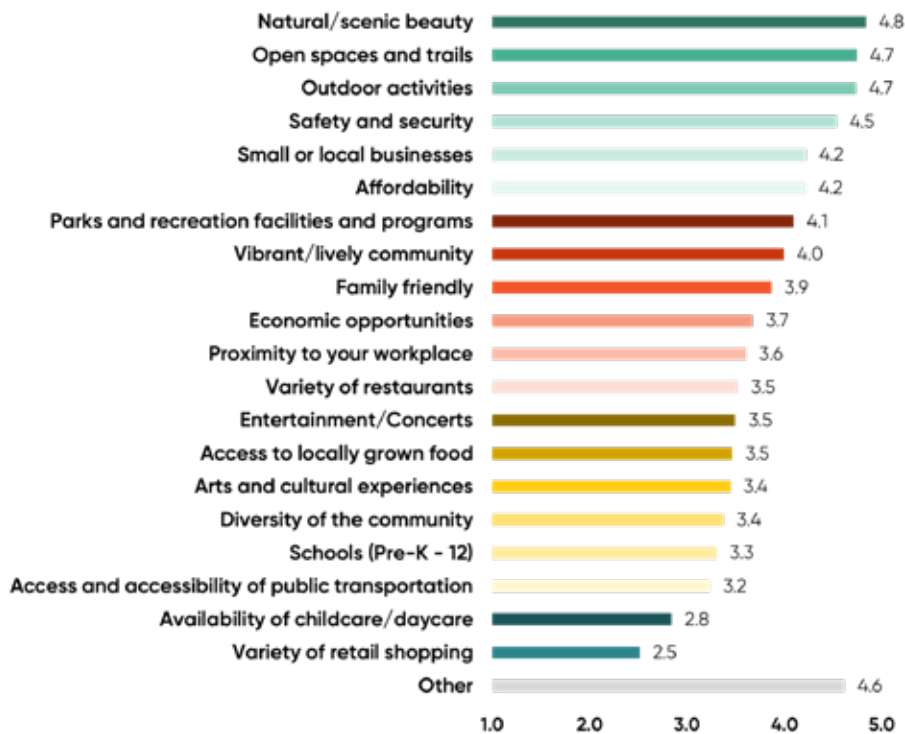
LOCAL VALUES

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.

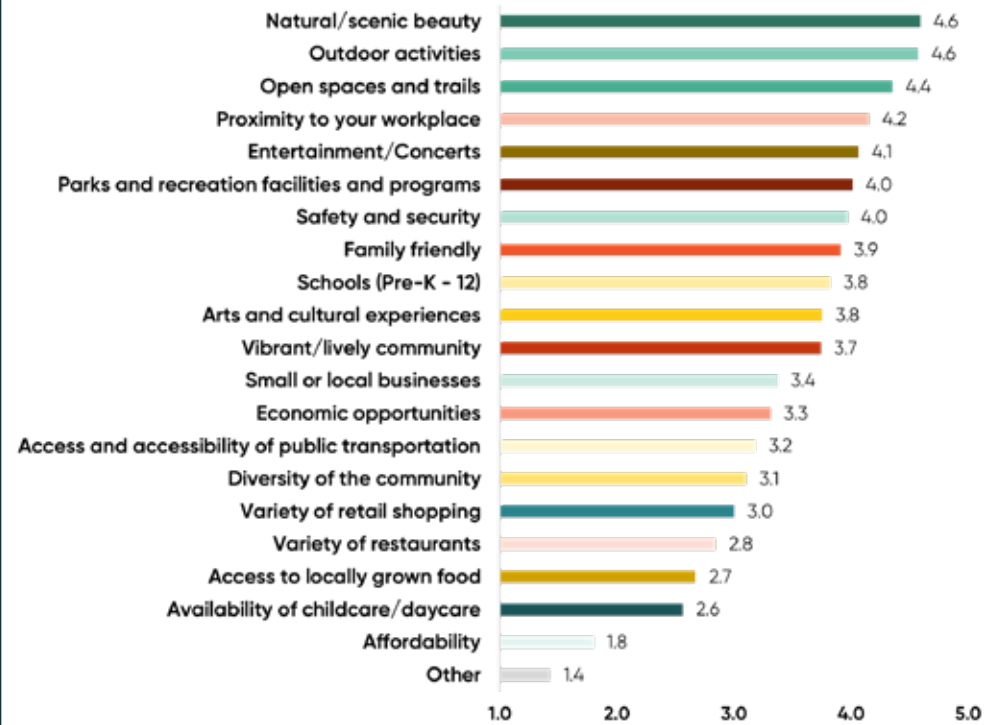


QUALITY OF LIFE IN BIG SKY

IMPORTANCE OF FACTORS FOR QUALITY OF LIFE



SATISFACTION OF FACTORS FOR QUALITY OF LIFE



RESPONDENTS' OPINION OF TOURISM GROWTH

WHAT DIRECTION IS TOURISM HEADED IN BIG SKY?



- 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.

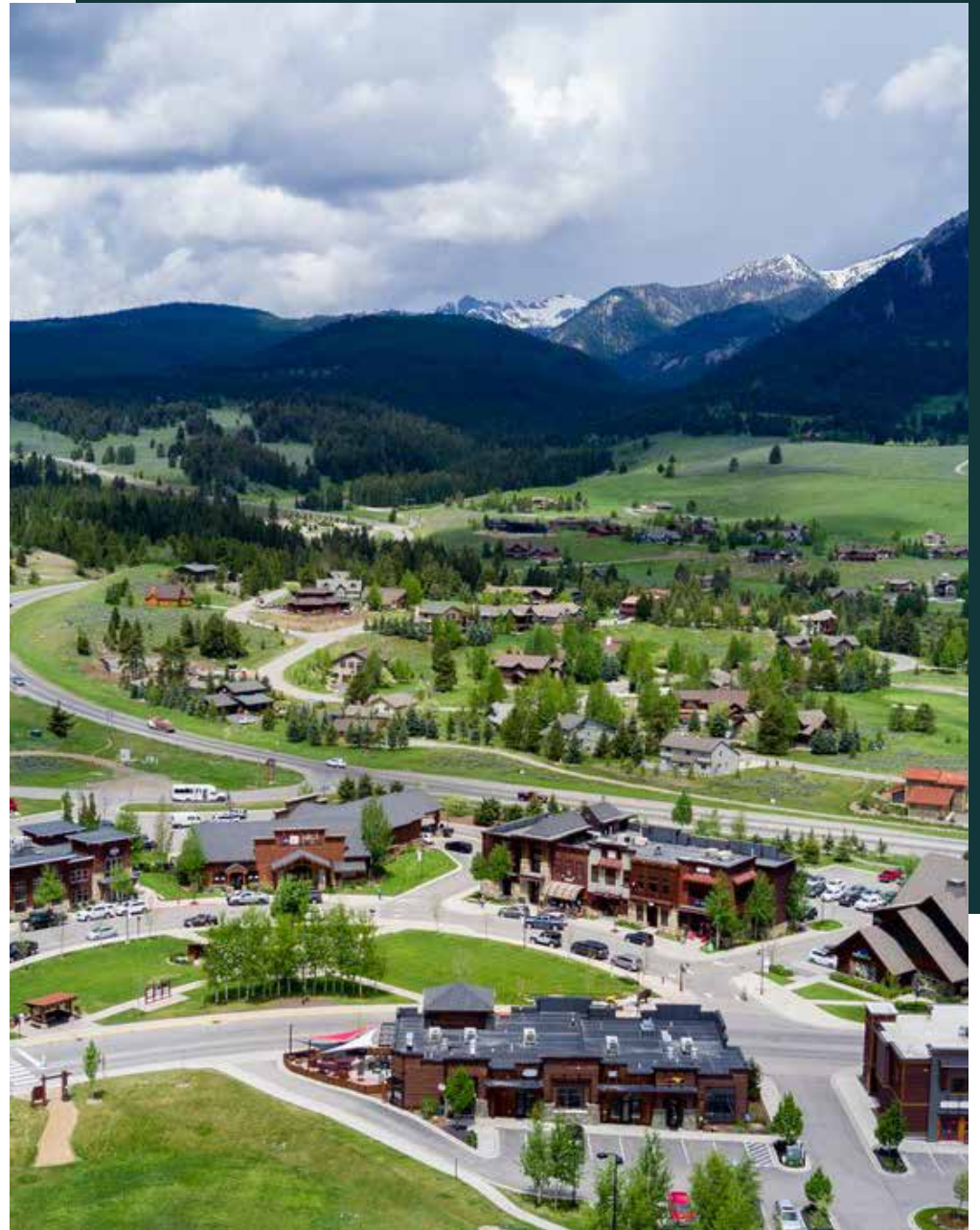
TOURISM GROWTH

HOW DOES TOURISM GROWTH IMPACT RESIDENTS' QUALITY OF LIFE?

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 and the workforce in Big Sky. Furthermore, they express a degree of disagreement regarding the responsible and sustainable nature of tourism growth.


"I think we need to focus on all the positives tourism brings to our town, but also how we can grow and support the things that make this town great throughout the process."


"Growth is coming at the expense of locals, local businesses, quality of workforce available. Businesses will not be able to operate with quality workforce by pricing everyone out, including senior management."





TOURISM ALIGNMENT STRATEGIES


SUGGESTIONS FOR BETTER ALIGNMENT BETWEEN RESIDENT NEEDS AND TOURISM INDUSTRY


- **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

CREATING A SHARED VISION FOR TOURISM

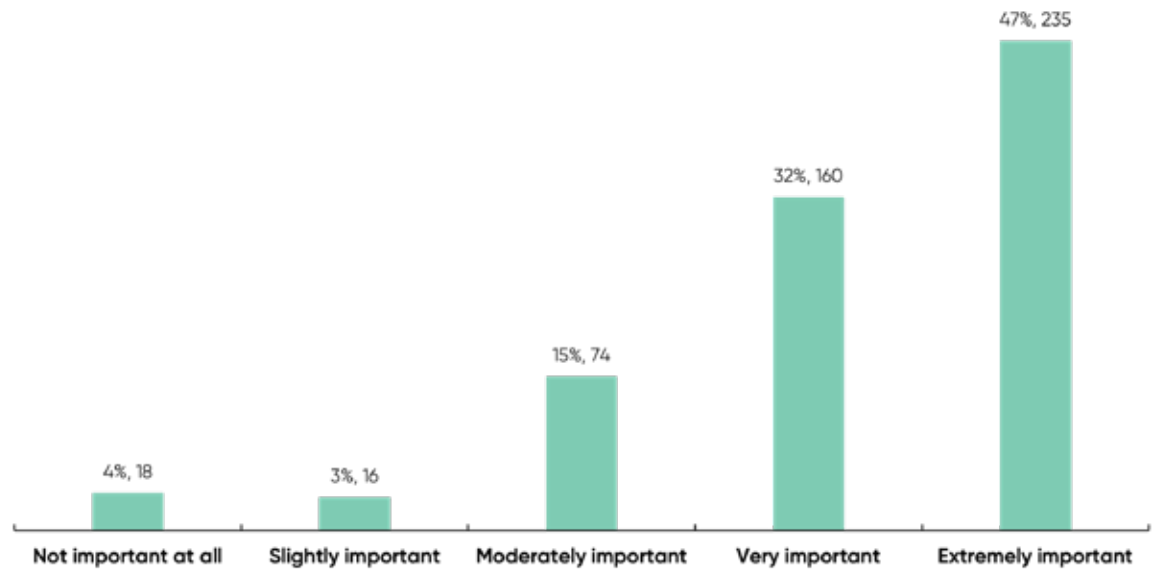
RESIDENT RECOMMENDATIONS

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.

IMPORTANCE OF A SHARED VISION FOR TOURISM IN BIG SKY

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



FUTURE OF TOURISM

FACTORS FOR A SUCCESSFUL FUTURE TOURISM ECONOMY

Respondents expressed a consensus that these factors are pivotal in forging a thriving future for Big Sky's tourism economy over the next 15 years. In essence, a common goal was apparent: achieving equilibrium among tourist needs, resident welfare, environmental stewardship, and economic sustainability.

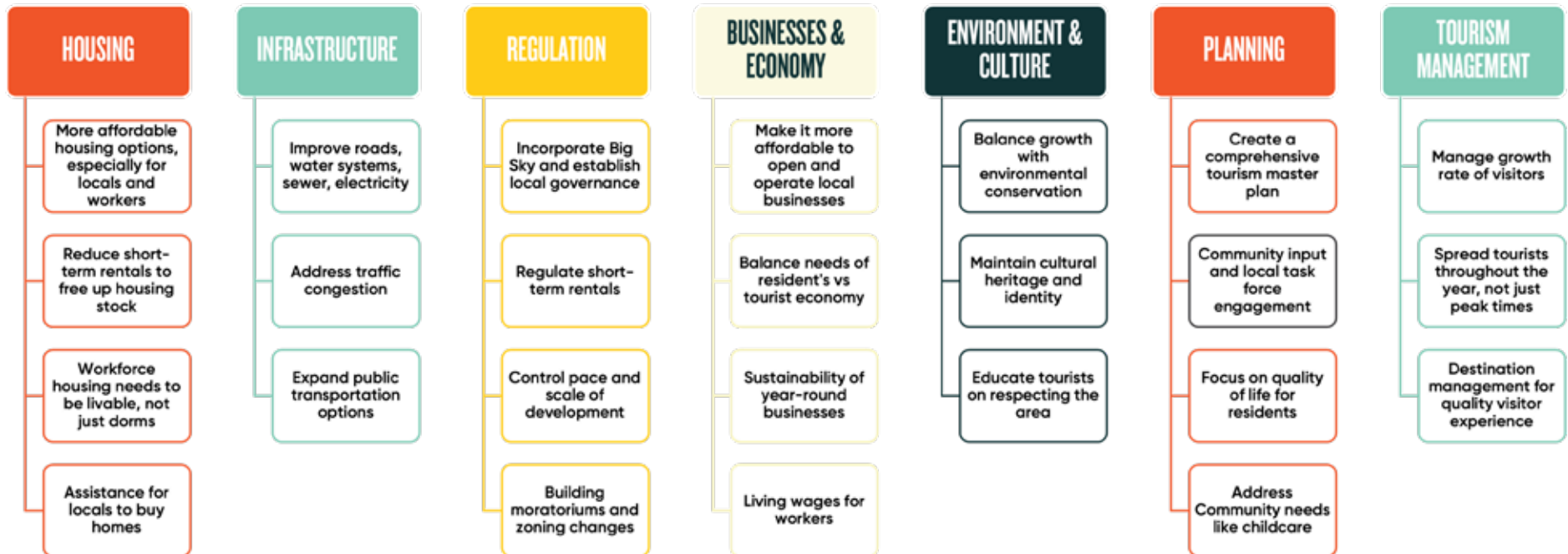
Moreover, Big Sky's tourism industry stakeholders stressed the critical issue of staff retention and recruitment, underscoring the vital necessity of accessible, affordable workforce housing. This element is also key in ensuring stable staffing levels, essential for continuous operation and attracting increased business.

HOUSING	INFRASTRUCTURE	BALANCE	STABILITY	DEVELOPMENT
<ul style="list-style-type: none">• 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	<ul style="list-style-type: none">• 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.	<ul style="list-style-type: none">• 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	<ul style="list-style-type: none">• 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	<ul style="list-style-type: none">• 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.

NEAR-TERM GOALS

WHAT NEEDS TO HAPPEN WITHIN THE NEXT ONE-TO-THREE YEARS?

In general, the prominent themes for realizing a vision of success for tourism in the coming one-to-three 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.



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.

NEUTRAL SENTIMENTS

- Concerns about overcrowding, traffic, parking issues due to booming tourism.
- Desire for more amenities like restaurants, retail, and 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.

TOURISM INDUSTRY

LEADERS IN THE TOURISM INDUSTRY

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

OWNER CONCERNS FOR BUSINESS FOR THE NEXT YEAR



VISIT BIG SKY SUPPORT

TOURISM INDUSTRY SUPPORT

Most leaders in the tourism industry agree that their businesses rely on both out-of-state and in-state visitors for success. However, some may require additional support in key areas to sustain their operations. This includes having the necessary tools and resources for workforce training and retention, developing marketing strategies for sustainable visitation, and having a say in how Big Sky can best manage the impact of tourism.

All respondents in the tourism industry expressed a neutral sentiment regarding their awareness of the support that Visit Big Sky provides in promoting local businesses, involving stakeholders in tourism development, crafting tourism management plans, and communicating economic and social impacts to the local tourism economy. Many of these sentiments will be further discussed in the following section, which explores how Visit Big Sky is working to enhance support and awareness among industry stakeholders.



03

STRATEGIC IMPACT AREAS

Similarities and differences in visitor, resident, and stakeholder surveys and how they align with Big Sky's six strategic impact areas



STRATEGIC IMPACT AREAS

INITIATIVES FOR A SUCCESSFUL FUTURE OF TOURISM

Visit Big Sky has identified six impact areas to implement initiatives aimed at improving the visitor experience and enhancing the sense of place and belonging within the Big Sky community. Many of these initiatives align with the visions of other Big Sky stakeholders for the future of tourism. For example, Big Sky Resort has identified four guiding pillars: providing the Alpine Experience, reimagining the Mountain Village, fostering local partnerships with the Big Sky community, and enhancing connectivity through air and ground transportation.

EVOLVE THE OUTDOOR RECREATIONAL EXPERIENCE

Invest in multi-modal trail systems

SUPPORT BIG SKY'S TOURISM WORKFORCE

Enhance workforce housing programs and support services

IMPROVE ENVIRONMENTAL SUSTAINABILITY OF THE INDUSTRY

Climate action toward carbon reduction, environmental preservation and protection of natural resources

DEVELOP SHOULDER SEASON EXPERIENCE

Enhance and support off-peak experiences that draw visitation

RECONNECT AND CULTIVATE A SENSE OF PLACE

Include community in shared vision and create a culture of caring for Big Sky

IMPROVE TRANSPORTATION

Support sustainable transportation options and improvements in infrastructure

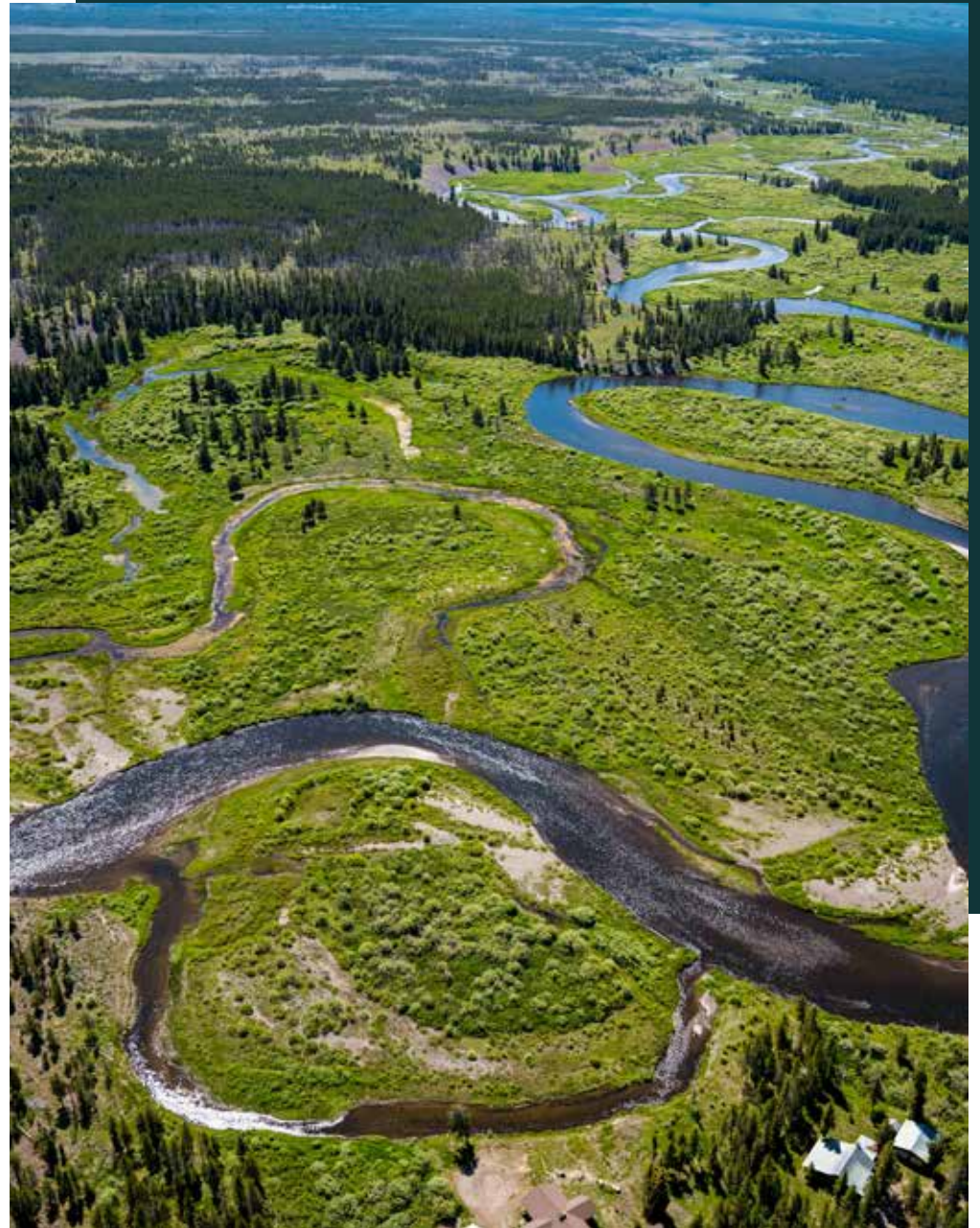
ALIGNMENT WITH SURVEY RESULTS

INFORMED DECISION MAKING

The results of the visitor, resident, and tourism industry stakeholder surveys will offer valuable insights and sentiments that will inform the action plans for implementing the six strategic impact areas. The following sections will delve into each impact area and examine how the results either align with or diverge from the envisioned objectives of these six initiatives. Furthermore, we may showcase examples of sustainable solutions adopted by other tourism destinations as potential sources of inspiration for implementation and community engagement.

“Members of the Collaborative that have led and funded this planning process **believe that no existing organization is equipped to take responsibility for implementing the plan.** This planning process has yielded a growing awareness that the best outcomes will flow from an ongoing partnership that is united in a shared commitment to action, transparency, communication, and inclusion.”

-Lake Tahoe Destination Stewardship Plan





**HIKING,
MOUNTAIN
BIKING, AND
RUNNING WERE
COMMONLY
LISTED
ACTIVITIES
RESPONDENTS
ENGAGED IN, AS
WELL AS SKIING
AND WINTER
SPORTS THAT
UTILIZE EXISTING
TRAILS**

EVOLVE OUTDOOR RECREATIONAL EXPERIENCE

INVEST IN MULTI-MODAL TRAIL SYSTEMS

The purpose of a multi-modal trail system is to provide safe and accessible routes for various forms of transportation, promote outdoor recreation, reduce reliance on automobiles, and encourage a healthier and more active lifestyle. The term “multi-modal” refers to the inclusion of multiple means of movement within the same trail system. These modes typically include: walking or hiking, bicycling (mountain and road), running, skateboarding, cross-country skiing or snowshoeing, and wheelchair-accessible trails.

SHOULDER SEASON RECREATIONAL TRAIL SYSTEMS

Other mountain town destinations have effectively broadened their appeal beyond winter sports by showcasing their natural beauty. For instance, Jackson Hole, Wyoming has seen increased visitation during the shoulder seasons by enticing visitors to explore its hiking and horseback riding trails. Similarly, places like Bend, Oregon, Whistler, British Columbia, and Aspen, Colorado have transformed their ski slopes into venues for downhill mountain biking experiences and have gained recognition for hosting world-renowned mountain biking festivals.

VISITOR PERCEPTION

CONNECTIVITY FOR MORE RECREATION ACTIVITIES

With outdoor recreation activities ranked as the foremost reason for visiting Big Sky, it is imperative that enhancing connectivity and access to multi-modal trail systems become a top priority for future tourism strategies. Many respondents emphasized the necessity for alternative means of getting around town that do not depend solely on vehicle transportation. Establishing multi-modal connectivity between Big Sky Mountain Village and Big Sky Town Center would offer both visitors and residents more opportunities to access a network of multi-modal trails for recreation and alternative transportation.

While some visitors appreciated the variety of ski and bike trails that Big Sky has to offer, there were suggestions for the development of new trails, particularly flow trails. Additionally, there were mentions of the need for improved signage on ski trails and educational signage promoting responsible environmental practices, such as the “leave no trace” concept. Visitors also expressed the importance of better trail maintenance and the development of restroom facilities.

A significant concern raised by visitors was the absence of walkability infrastructure, including sidewalks, in the Mountain Village area. Visitors reported feeling unsafe walking on the roads with vehicles passing so closely, highlighting the need to experience the beauty of walking around Big Sky safely.

RESIDENT PERCEPTION

ADVANCING OUTDOOR RECREATION OPPORTUNITIES

Approximately 80% of residents and stakeholders expressed a moderate to very significant interest in developing or expanding connected recreational multi-use trail systems. Some residents believe that for Big Sky to thrive in its tourism economy over the next 15 years, creating a more walkable community, particularly within the mountain resort area, is imperative. One resident noted that an ideal vision for Big Sky’s future includes the ability to **“get anywhere on public trails,”** fostering a deeper connection with the environment and creating a strong sense of place.

Expanding or creating additional trail networks not only promotes connectivity across Big Sky but also has the potential to alleviate congestion on existing trails, thus distributing the number of trail users of overcrowded routes. One resident emphasized the need for **“more public trailheads for biking and hiking”** and advocated for **“collaboration with the forest service to expand trail options and access.”**

Furthermore, some residents believe that Big Sky should allocate more funding to trail development to attract additional visitors during the summer, spring, and fall seasons, thus mitigating the challenges the community faces during shoulder seasons.



AFFORDABLE HOUSING, FAIR PRICES FOR SERVICES, AND WORKFORCE INCLUSION IN THE COMMUNITY ARE KEY FACTORS FOR A SUCCESSFUL TOURISM ECONOMY

SUPPORT TOURISM WORKFORCE

AFFORDABLE HOUSING

Mountain communities often face challenges in providing affordable workforce housing due to high demand from seasonal employees and the cost of living in picturesque, but often expensive, locales. To address this issue, many of these communities have implemented various solutions to make housing more accessible for their workforces. Some common approaches include: employee housing programs, zoning and land use policies, public-private partnerships, inclusionary housing policies, and affordable housing trust funds.

ACCESS TO SERVICES

Ensuring access to affordable housing and services for the tourism workforce is a crucial element in fostering a thriving tourism economy and promoting a sense of inclusion within the community for these workers.

For instance, Lake Tahoe has implemented several programs to allocate Transient Occupancy Taxes (TOT) as well as create new Tourism Business Districts (TBID) to enable funding of community priorities such as workforce housing and transportation. Furthermore, Lake Tahoe has introduced a 'Lease to Locals' program, offering incentives to property owners who lease their short-term rental properties to the local workforce in the Lake Tahoe area.

VISITOR PERCEPTION

STRONG PRESENCE OF STAFFING SHORTAGE

Throughout the visitor survey responses, it was observed that numerous restaurants and retail establishments were severely understaffed, with some even remaining closed due to staffing shortages. Visitors recommended that increasing workforce housing could contribute to greater reliability in staying open and maintaining a consistent workforce. Furthermore, visitors noticed that many staff members appeared overworked, resulting in heightened stress levels and less friendly interactions.

Enhancing workforce staffing and ensuring consistent quality experiences at restaurants and retail establishments was the second most frequently mentioned improvement for visitor experiences in the survey.

Visitors observed that hotels and resorts were also facing significant staffing shortages. Some visitors pointed out that staff members were encountering challenges in commuting from Bozeman to the resorts. As a potential solution, some visitors suggested the implementation of more frequent public transportation options with increased stops in neighborhoods. They recommended collaboration with regional transportation agencies to enhance workforce transportation accessibility.

RESIDENT PERCEPTION

INCLUSION IN THE COMMUNITY

Residents and stakeholders, much like the visitors, have experienced the repercussions of staffing shortages and the community's reliance on tourism. The shoulder seasons have had an even more pronounced effect on residents due to reduced business hours and a limited variety of options for both residents and visitors. Residents believe that prioritizing affordable housing is essential, but they also stress the importance of offering higher wages and fostering a sense of inclusion within the community to retain staff.

Residents and stakeholders recognize the efforts taken to increase workforce housing. However, they have concerns about the message Big Sky is sending to its workforce community. **"While new housing is expected to help attract staff, I have concerns about the quality of the initial housing phase, which is subpar, and I think it delivers a message that we don't care about the tenants and certainly don't see them as part of the community."** A respondent expressed regret about supporting the development of such housing units, emphasizing the need for not just affordable housing but also attractive and comfortable accommodations to retain good employees.

Supporting the tourism workforce enables businesses to operate year-round for the benefit of both visitors and residents. This, in turn, allows businesses to provide improved employment opportunities and benefits to their staff, ultimately reducing the burnout rate.



**NATURE
PRESERVATION**

**STEWARDSHIP
EDUCATION FOR
VISITORS**

**SUSTAINABLE
INITIATIVES**

**CLIMATE
RESILIENCY**

IMPROVE ENVIRONMENTAL SUSTAINABILITY

CLIMATE ACTION

Climate action refers to the measures and strategies taken by destinations to address and mitigate the impacts of climate change while promoting environmental sustainability. These actions are aimed at reducing greenhouse gas emissions, adapting to climate-related challenges, and fostering sustainable practices in the tourism industry. Some of the key components of climate action in destination management include: reducing carbon footprint, tourist investment in carbon offsetting, renewable energy adoption, sustainable transportation, climate resilience planning, public awareness and education, and creating partnerships to collaborate on climate action and sustainability efforts.

ENVIRONMENTAL SUSTAINABILITY AND STEWARDSHIP

As Big Sky develops its environmental sustainability strategy, it should prioritize the following themes, as they were mentioned throughout the survey results:

- **NATURE PRESERVATION**
- **STEWARDSHIP EDUCATION FOR VISITORS**
- **SUSTAINABLE INITIATIVES IN TRANSPORTATION, WASTE REDUCTION, AND BUILDING PRACTICES**
- **CLIMATE RESILIENCY**

VISITOR PERCEPTION

PROTECTING THE VALUE OF SCENERY AND BEAUTY

Visitors highly value the scenic beauty of Big Sky, ranking it as the second most important factor for their visitation. However, this appreciation for the natural splendor is closely intertwined with concerns about the destination's growth and the need for sustainable practices. Some visitors worry that the ongoing development in Big Sky is gradually encroaching upon the pristine views they have cherished during their years of visitation. Overall, visitors are calling for a greater commitment to environmentally conscious practices and sustainable operations, underscoring the importance of balancing growth with nature, adhering to sustainable building standards, and preserving the scenic beauty that draws them to the area.

Furthermore, many visitors believe that Big Sky should implement waste reduction and recycling strategies, along with improved infrastructure to mitigate the levels of litter and pollution observed during their visits. Concerns extend to garbage found on trails, waterways, and slopes, often attributed to limited access to waste or recycling containers. Addressing these environmental concerns not only enhances the visitor experience but also plays a crucial role in preserving the scenic beauty that makes Big Sky a cherished destination while promoting environmental sustainability.

RESIDENT PERCEPTION

CONCERNS ABOUT ENVIRONMENTAL IMPACTS

At the forefront of residents' and stakeholders' concerns are the environmental impacts of overdevelopment and the absence of sustainable building practices. There is a notable discrepancy in the perception of whether the tourism industry truly values sustainability and the town's natural resources. Many individuals firmly believe that preserving outdoor spaces and investing in environmental sustainability should be a top priority for ensuring the future success of Big Sky's tourism economy.

Residents and stakeholders express deep concern that the growth of tourism is inflicting significant environmental harm, manifesting as issues like overcrowding, traffic congestion, pollution, disturbances to wildlife, and heightened fire risks. Some propose the development of educational strategies to actively engage visitors as stewards of the environment, promoting responsible tourism practices that align with Big Sky's environmental sustainability goals.

When envisioning success for Big Sky over the next 15 years, many emphasize the importance of reducing carbon emissions and dependence on vehicular transportation, while also advocating for more sustainable transportation services and the development of a comprehensive emergency preparedness plan.



**EXPAND AND
DIVERSIFY
SEASONAL
ATTRACTIONS
AND OFFERINGS**

**PROMOTE
OFF-SEASON
DISCOUNTS**

**FOSTER LOCAL
PARTNERSHIPS
TO ENHANCE
VISITOR
EXPERIENCE**

DEVELOP SHOULDER SEASON EXPERIENCE

SHOULDER SEASON RECREATION

Many mountain communities similar to Big Sky have successfully developed shoulder season recreation opportunities to attract visitors and mitigate the challenges of seasonality. These mountain communities have diversified their offerings by capitalizing on their natural surroundings, investing in infrastructure, and promoting various activities and events. By doing so, they've successfully extended their tourist seasons and reduced the impact of seasonality on their economies.

OVERCOMING SEASONALITY

Similar destinations often grapple with the challenges of mitigating the impacts of tourism seasonality. Several effective strategies employed by other mountain communities include boosting tourist demand in the off-peak season, managing and balancing tourist demand in the peak season, and redistributing tourist demand across seasons.

One successful approach to enhancing demand during the off-peak seasons involves implementing off-season discounts, diversifying available attractions, exploring diverse market segments, promoting selective forms of tourism, and fostering local partnerships. Notably, a Bulgarian mountain destination achieved significant success by diversifying its attractions. This initiative introduced a range of new offerings, such as special events, festivals tailored to specific target markets, vacation packages, culinary and wine tourism experiences, cultural and historical tours, guided hikes in nature parks and along trails, and educational tours.

Reducing the dependency on a single season and taking a balanced approach to tourism can lead to a healthier and more sustainable local economy, with benefits that extend beyond the tourism sector and positively impact the entire community.

VISITOR PERCEPTION

TO SKI OR NOT TO SKI

The primary motivation for visiting Big Sky appeared to be skiing, with a significant 86% of respondents indicating their preference for visiting during the winter months. Only 20% of respondents mentioned visiting in the spring, and 13% in the fall. There seems to be a prevalent perception among visitors that skiing is the predominant attraction in Big Sky. To note, a significant portion of survey responses came from Big Sky Resort visitors. Some respondents who traveled to Big Sky for work or conferences found that golf appeared to be the only other available activity.

Visitors who ventured to Big Sky during the shoulder seasons expressed disappointment due to limited dining and retail options, as many establishments were closed. Others expressed a desire for more events, such as farmers' markets, and a wider range of affordable family activities to enhance their experience. This sentiment was echoed by winter visitors as well, who sought more affordable activities to complement their stay, especially given the perceived high costs of skiing and lift tickets, with the hope that alternative activities could encourage longer visits. In addition to alternative activities, visitors suggested that tourism businesses and resorts should consider offering off-season discounts or packages as a means to encourage stays beyond the ski season.

RESIDENT PERCEPTION

BALANCING TOURISM ACROSS THE SEASONS

When residents and stakeholders were surveyed regarding their preferred level of tourism throughout the year, the majority expressed a desire for the status quo to be maintained. However, it is noteworthy that approximately 40% of respondents indicated a preference for reducing tourism during the winter and summer months. Conversely, slightly over 30% advocated for an increase in tourism during the spring and fall seasons.

It's essential to contextualize these opinions within a broader framework of priorities. Respondents emphasized that any potential expansion of tourism should be preceded by addressing pressing concerns, such as improving affordability for residents and the workforce, establishing local governance structures to manage growth effectively and ensure sustainable development, and formulating comprehensive, long-term sustainability plans for both the community and the tourism industry.

Residents and stakeholders shared a common perspective: creating opportunities for seasonal workers to remain in Big Sky year-round would strengthen the community's cohesion and enhance its overall value. The prospect of establishing off-season events, activities, and tour-guiding opportunities could potentially offer compelling reasons for individuals to stay in Big Sky even after the snow has melted and the mountain has closed for the season.



**PRESERVE
LOCAL CULTURE**

**COMMUNITY
ENGAGEMENT**

**SHOWCASE
AUTHENTIC
EXPERIENCES**

**SUPPORT LOCAL
BUSINESSES**

RECONNECT AND CULTIVATE A SENSE OF PLACE

NURTURING A SENSE OF PLACE

A prominent human geographer, Yi Fu Tuan, known for his work on the concept of sense of place, believes **a community thrives when it nurtures a sense of place, where the people feel a deep connection to their environment, culture, and history.** This connection fosters a unique identity and a shared commitment to preserving and enriching the essence of their community.

RECONNECTING TO BIG SKY'S ROOTS

Upholding the unique identity and community values upon which Big Sky was founded will foster a strong sense of place among residents, visitors, and the workforce. Cultivating this sense of place is a time-intensive and collaborative effort that involves the local community, businesses, and tourism organizations working together. The ultimate objective is to create a destination where visitors not only enjoy their stay but also develop a profound appreciation for the place's distinct character and identity.

Strategies to achieve this goal encompass preserving local culture and heritage, promoting authentic experiences, engaging the community, supporting local businesses, encouraging storytelling, incorporating public art and design, organizing cultural festivals and events, educating visitors, and preserving the natural beauty of the area. Most importantly, the development of a strategy to reconnect and cultivate a sense of place should be a collaborative endeavor involving a diverse range of perspectives within the community.

VISITOR PERCEPTION

SUSTAIN THE SMALL TOWN CHARM

One factor contributing to why Big Sky met visitors' expectations was its small-town charm and welcoming community. Visitors appreciated the warm atmosphere and the sense of community they experienced through interactions with friendly locals and local establishments.

However, some visitors felt that this small-town feel had diminished due to issues of affordability and rapid growth, making it less inviting to families. While some remarked that Big Sky was less crowded compared to other ski resorts, others believed that overcrowding was altering the small-town charm they had initially appreciated. These changes had led some visitors to perceive Big Sky as becoming pretentious and exclusionary.

Among the top reasons that encouraged a return visit to Big Sky was the preservation of its original culture and the retention of the small, rural Montana experience. Maintaining the intimate nature of Big Sky made some visitors feel like they were an integral part of the community, thus contributing to the cultivation of a strong sense of place.

RESIDENT PERCEPTION

BALANCE OF TOURISM AND RETAINING CULTURE

A recurring theme in the responses from residents and stakeholders emphasizes the importance of Big Sky achieving a balance between tourism growth and the preservation of its unique culture and sense of place. Survey respondents strongly advocate for a strategy that involves giving residents a more substantial role in governance decisions, ensuring that any expansion of tourism aligns harmoniously with the community's needs.

The development of the other five strategies for a successful tourism economy is closely intertwined and significantly impacts the ability to reestablish and nurture a sense of place. One of the primary concerns expressed by business owners and managers in the tourism industry is the sentiment and attitude of residents toward tourism. This underscores the significance of having a shared vision for tourism.

Above all other factors, the residents and those with deep roots in Big Sky highly value the preservation of a strong sense of community and a profound connection to the place.



IMPROVE ROADS,
PARKING, AND
ALTERNATIVE
TRANSPORTATION
METHODS TO
SUPPORT THE
INCREASED
CROWDS

REDUCE TRAFFIC
CONGESTION

PROMOTE ACTIVE
TRANSPORTATION
SOLUTIONS

IMPROVE TRANSPORTATION

ACTIVE AND ALTERNATIVE TRANSPORTATION OPTIONS

Active transportation refers to the use of human-powered modes of transportation, such as walking, cycling, and non-motorized scooters, as a means of getting around. This concept is especially relevant in mountain communities, where the natural surroundings and recreational opportunities make it conducive to walking and cycling. Examples of active transportation initiatives implemented in tourism destinations within mountain communities include:

1. **Enhancing Pedestrian Infrastructure:** This involves increasing pedestrian-friendly infrastructure, such as wide sidewalks, pedestrian bridges, and safe crosswalks.
2. **Creating Pedestrian-Only Zones:** Some destinations have established car-free areas in town centers or near popular attractions, encouraging both tourists and locals to explore on foot.
3. **Bike Share and Electric Scooter Programs:** These programs allow tourists to conveniently rent bicycles or scooters for short trips around the area, facilitating transportation and sightseeing.
4. **Multi-Modal Trail Networks:** Trails and pathways offer numerous options for tourists and residents to explore the natural beauty of the area on foot or by bicycle.
5. **Shuttle Services:** Providing shuttle services that connect key tourist areas within the community can reduce the need for private vehicles. Shuttle systems are often eco-friendly and can contribute to reducing traffic congestion and carbon emissions.

By implementing these active and alternative transportation initiatives, mountain communities can reduce congestion and carbon emissions, enhance the visitor experience, and contribute to the overall sustainability and health of the region. These initiatives align with the desire to provide tourists with a deeper connection to the natural environment and local culture.

VISITOR PERCEPTION

IMPROVE ROADS AND ALTERNATIVE TRANSPORTATION

A common perception among visitor survey responses highlighted the need for improving inadequate and poorly maintained roads. The construction and overcrowding appeared to contribute significantly to traffic congestion, leading to some negative visitor experiences. Additionally, concerns about the safety of driving from Bozeman to Big Sky were voiced. Some visitors suggested offering an affordable and accessible shuttle service from Bozeman Airport to Big Sky, which could alleviate congestion and enhance the sense of safety, especially for drivers inexperienced with icy or snowy conditions.

Furthermore, visitors expressed a desire for the expansion of public transportation or shuttle services within Big Sky, with frequent stops in neighborhoods, the town center, and the mountain resort area. They believed these services should be either free or offered at a very low fee to support sustainability initiatives aimed at reducing car traffic, addressing parking issues, and minimizing environmental impact.

Visitors were also in support of developing pedestrian infrastructure and enhancing the connectivity of trail networks, particularly within the Mountain Village and between the Mountain Village and Big Sky Town Center. These improvements would contribute to a more walkable and environmentally friendly environment, aligning with the overall goals of the community.

RESIDENT PERCEPTION

REDUCE THE TRAFFIC

Secondary to the primary concern of affordability, residents and stakeholders share a concern for addressing traffic issues and enhancing infrastructure to accommodate the growing volume of vehicles. Residents are particularly troubled by traffic congestion both within Big Sky and on the route between Bozeman and Big Sky. They expressed a desire for increased transportation options between Bozeman and Big Sky, aiming to alleviate traffic congestion that some liken to the rush hour gridlock of Los Angeles.

Furthermore, some respondents pointed out that heavy trucks associated with development and construction projects are exacerbating the already-deteriorating road infrastructure. They also expressed frustration with the increased construction for development within Big Sky, as it contributes to longer wait times and further worsens congestion.

Residents emphasized the importance of improved traffic control measures to promote smoother traffic flow within Big Sky. Moreover, residents are supportive of alternative transportation methods, such as shuttle services and van pickups, as they seek solutions to reduce the reliance on individual vehicles and promote more sustainable and efficient transportation choices within the community, including active transportation networks.



THE FUTURE OF BIG SKY

INSIGHTS THAT LEAD TO IMPACT

The experiences and perceptions of tourism in Big Sky, Montana gathered in the comprehensive visitor, resident, and tourism industry stakeholder surveys gave insight to these key findings:

- 1. Visitors are primarily drawn to Big Sky for skiing, scenic beauty, and family time, with outdoor activities being a significant motivator.**
- 2. Positive aspects include the area's natural beauty, recreational activities, and small-town charm. However, high costs, overcrowding, and limited dining options were cited as drawbacks.**
- 3. Residents love Big Sky for its natural beauty, outdoor activities, and sense of community. They emphasize the need to balance local values like affordability, community, and environmental preservation with tourism growth.**
- 4. Tourism industry leaders focus on challenges like affordable housing for employees and staff recruitment/retention, highlighting the need for support in these areas.**

These insights emphasize the need for sustainable and community-focused development strategies, ensuring that Big Sky's growth harmoniously aligns with the needs and values of both residents, visitors, and the workforces that supports the tourism economy.

NEXT STEPS

VISIT BIG SKY TOURISM STRATEGIES

Survey insights aligned with Visit Big Sky's six impact areas, highlighting key priorities for future strategy development. The most congruent areas between visitor and resident responses were:

1. **Support Tourism Workforce**
2. **Improve Transportation**
3. **Evolve Outdoor Recreational Experience**

The other three areas, while crucial for residents and stakeholders, were less prioritized by visitors. Nevertheless, all six impact areas are vital for Big Sky's sustainable tourism strategy development.





THANKS

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