

University of Montana

ScholarWorks at University of Montana

Institute for Tourism and Recreation Research
Publications

Institute for Tourism and Recreation Research

10-2020

The Montana Expression 2020: Impact of COVID-19 on Montana's Tourism Related Businesses - Wave 4

Carter Bermingham

University of Montana - Missoula

Kara Grau

The University of Montana - Missoula

Norma P. Nickerson

University of Montana - Missoula

Follow this and additional works at: https://scholarworks.umt.edu/itrr_pubs



Part of the [Social and Behavioral Sciences Commons](#)

Let us know how access to this document benefits you.

Recommended Citation

Bermingham, Carter; Grau, Kara; and Nickerson, Norma P., "The Montana Expression 2020: Impact of COVID-19 on Montana's Tourism Related Businesses - Wave 4" (2020). *Institute for Tourism and Recreation Research Publications*. 413.

https://scholarworks.umt.edu/itrr_pubs/413

This Report is brought to you for free and open access by the Institute for Tourism and Recreation Research at ScholarWorks at University of Montana. It has been accepted for inclusion in Institute for Tourism and Recreation Research Publications by an authorized administrator of ScholarWorks at University of Montana. For more information, please contact scholarworks@mso.umt.edu.

The Montana Expression 2020:
Impact of COVID-19 on Montana's Tourism Related
Businesses – Wave 4

2020

INSTITUTE FOR
TOURISM & RECREATION RESEARCH
UNIVERSITY OF MONTANA

The Montana Expression 2020:
Impact of COVID-19 on Montana's Tourism Related
Businesses – Wave 4

MT Expression Research Report 2020-11

Carter Bermingham, Kara Grau, Norma P. Nickerson

10/13/2020



Institute for Tourism & Recreation Research
College of Forestry and Conservation
The University of Montana
Missoula, MT 59812
www.itrr.umt.edu

Copyright© 2020 Institute for Tourism and Recreation Research. All rights reserved.

The Montana Expression 2020: 2020 Impact of COVID-19 on Montana's Tourism Related Businesses – Wave 4

Introduction

As winter approaches, the coronavirus (COVID-19) pandemic continues to be an ever-present reality for Montanans. As of October 12th, 2020, the outbreak has infected more than 34 million people worldwide, resulting in over one million deaths. In the United States, the cumulative case count currently stands at 7.78 million, with over 214,000 deaths (Johns Hopkins University, 2020).

In Montana, there have been 19,000 confirmed cases and 212 deaths as of October 12th, 2020. On June 1st, 2020, Montana entered Phase Two of Governor Steve Bullock's reopening plan. Phase Two allowed for establishments like restaurants, bars, and gyms to begin operating at 75% capacity while also ending the mandatory 14-day quarantine for non-work-related arrivals to Montana. On July 15th, 2020, Governor Bullock issued a directive requiring everyone five years old and older to wear a face covering when inside public spaces and when participating in outdoor activities with 50 or more people when social distancing is not possible or is not being observed.

Both Yellowstone National Park and Glacier National Park also began phased reopening beginning in late May and early June. In Yellowstone National Park (YNP), all five entrances have been open to the public since June 1st. In fact, for the month of July YNP reported a 2.10% increase in recreation visits when compared to 2019 figures, followed by an 7.5% increase for the month of August, and a remarkable 21% increase for the month of September (NPS, 2020). In Glacier National Park, only entrances on the West Side of the park have opened, as members of the bordering Blackfeet Nation have opted to keep travel into the park via the East Side closed, taking precautionary measures to protect any vulnerable residents of the Blackfeet Reservation.

Purpose

The purpose of this report was to collect and analyze responses from business owners and managers on a COVID-19 related survey as it pertains to their operations in Montana. This study was the fourth iteration in a series of similar studies conducted by The Institute for Tourism and Recreation Research (ITRR) with the goal of capturing the perceptions of business owners and managers throughout the course of the pandemic.

Methods

The Institute for Tourism and Recreation Research at the University of Montana emailed a survey link to tourism-related business owners around Montana as well as to Montana business owners who are members of associations, chambers of commerce, and convention and visitor bureaus. To date, four COVID-19 Business Surveys have been conducted in Montana by ITRR for the purpose of understanding how travel-related business have been impacted by the pandemic.

All four surveys were sent out to the members of the ITRR listserve, which consists of businesses, land management agencies, and not-for-profit organizations around the state of Montana. The second and third surveys were also allowed to be "pushed out" by Chambers of Commerce, Convention, and Visitor

The Montana Expression 2020: 2020 Impact of COVID-19 on Montana's Tourism Related Businesses – Wave 4

Bureaus, and travel regions to their memberships. Respondents were given 48 hours to submit their survey.

- Survey #1 was emailed March 11th, before any positive cases had been confirmed in Montana
- Survey #2 was emailed March 25th, after schools had been closed and shelter-in-place orders had been announced by Governor Bullock.
- Survey #3 was emailed May 6th, two days after Phase 1 of reopening started in Montana.
- Survey #4 was emailed July 23rd.

The first two surveys were conducted on SNAP, a survey software program via an email survey invitation. The 3rd and 4th surveys were conducted using Qualtrics, a similar survey software program, and sent via an email invitation.

Response rates to these surveys were impossible to assess due to the unknown number of surveys that were sent out via third-party groups (associations, chambers, CVBs). Response size for the four surveys were: Survey #1 – 391 responses; Survey #2 – 919 responses; Survey #3 – 440 responses; and Survey #4 – 243 responses.

Data Analysis

The data are generally reported by respondent type:

- **Accommodations** consist of: Hotel/motel; bed & breakfast; rental homes/cabins/condos; campgrounds; guest ranches.
- **Tourism Services** consist of business that cater directly to travelers: Restaurant/bar; brewery/distillery; convenience store/gas station; auto repair; other transportation services (not airports); specialty retail (souvenirs, gift shops, fishing, hunting, outdoor gear, etc.); general retail; vehicle rental; casino; museum/interpretive center; ski resort; artist/crafter (made in MT).
- **Outfitter/Guides** consist of: Both outfitters who might hire the guides and the guides who are either independent or are contracted by outfitters.
- **Tourism Support Services** consist of businesses less likely to work directly with travelers: Land manage, rental management, tourism promotion/advertising agency; event coordinator/manager; finance/accounting; Association Director/chamber/CVB; construction; insurance; media; other service industry; other.

The Montana Expression 2020: Impact of COVID-19 on Montana's Tourism Related Businesses – Wave 4

2020

Results

Overall

		N	%
In which county is your primary business/employment?	Beaverhead	7	3%
	Big Horn	3	1%
	Broadwater	4	2%
	Carbon	5	2%
	Cascade	4	2%
	Choteau	2	1%
	Custer	3	1%
	Dawson	1	0%
	Fallon	1	0%
	Fergus	1	0%
	Flathead	31	13%
	Gallatin	22	9%
	Glacier	11	5%
	Granite	3	1%
	Hill	1	0%
	Jefferson	3	1%
	Lake	12	5%
	Lewis and Clark	15	6%
	Lincoln	7	3%
	McCone	8	3%
	Meagher	2	1%
	Mineral	3	1%
	Missoula	18	8%
	Musselshell	1	0%
	Park	22	9%
	Phillips	1	0%
	Powell	4	2%
	Ravalli	6	3%
	Richland	1	0%
	Roosevelt	1	0%
	Rosebud	1	0%
	Sanders	2	1%
	Silver Bow	11	5%
	Stillwater	2	1%
	Teton	2	1%
	Toole	2	1%
Valley	3	1%	
Yellowstone	9	4%	
Total		235	100%

The Montana Expression 2020: 2020 Impact of COVID-19 on Montana's Tourism Related Businesses – Wave 4

Overall		N	%
Main Business Categories	Accommodations	122	50%
	Tourism Services	51	21%
	Outfitter/Guide	21	9%
	Tourism Support Services	49	20%
	Overall	243	100%

Overall		Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree	Mean	N
Because of COVID-19, I...	Modified our cancellation policies	8%	7%	14%	30%	41%	3.90	185
	Will have a shorter summer season	16%	12%	10%	31%	31%	3.50	200
	Reduced my inventory	14%	11%	19%	37%	19%	3.34	167
	Reduced marketing	17%	20%	22%	23%	18%	3.07	200
	Changed our target markets	13%	18%	32%	24%	13%	3.05	188
	Temporarily closed my business (either by choice or by mandate)	31%	12%	8%	21%	28%	3.04	194
	Reduced my pricing	30%	18%	20%	17%	15%	2.70	188
	Partnered with other business to create special packages/marketing	25%	23%	32%	14%	6%	2.52	162
	Increased marketing	28%	24%	26%	14%	8%	2.51	196
	Will not be opening this season	49%	25%	11%	6%	9%	2.02	177
	Increased my pricing	46%	26%	23%	4%	1%	1.88	180
	Will expand my business	50%	25%	22%	3%	<1%	1.80	192
	Permanently closed (or will close) my business	57%	23%	11%	3%	6%	1.78	178

The Montana Expression 2020: 2020 Impact of COVID-19 on Montana's Tourism Related Businesses – Wave 4

Overall		Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Mean	N
To what extent do you agree with the following...	I'm worried about how long this economic recovery will take	1%	2%	5%	23%	69%	4.57	223
	My business will forever change our cleaning protocol	5%	11%	21%	40%	24%	3.66	219
	My business cannot survive a slow recovery	6%	16%	31%	21%	26%	3.46	207
	I am concerned about the health of my family based on reopening	18%	14%	15%	31%	23%	3.28	215
	I am concerned about the health of my community based on reopening	16%	16%	20%	31%	18%	3.2	220
	I am concerned about my personal health based on reopening	19%	15%	18%	31%	18%	3.15	220

Overall		Not at all worried	A bit worried	Somewhat worried	Extremely worried	Mean	N
How worried are you about potential or actual liability related to conducting business?	Tourism Support Services	11%	20%	31%	38%	2.96	45
	Tourism Services	14%	29%	33%	25%	2.67	49
	Accommodations	18%	32%	23%	28%	2.61	114
	Outfitter/Guide	38%	29%	24%	10%	2.05	21
	Overall	18%	28%	27%	28%	2.64	229

The Montana Expression 2020: 2020 Impact of COVID-19 on Montana's Tourism Related Businesses – Wave 4

Overall		Not an Issue	Slight Issue	Moderate Issue	Big Issue	Mean	N
To what extent do you experience the following workforce issues?	Hiring new part-time workforce	22%	7%	22%	49%	2.98	90
	Desire to work	20%	16%	18%	46%	2.9	89
	Hiring new full-time workforce	25%	6%	25%	44%	2.87	87
	Hiring new temporary workforce	33%	4%	19%	44%	2.74	89
	Keep existing workforce	12%	36%	28%	24%	2.64	90
	Qualified Employees	29%	16%	27%	28%	2.54	89
	Concern around safe workplace	25%	37%	21%	17%	2.3	89
	Safety protocol adherence	36%	35%	16%	13%	2.07	90
	Employee work environment	39%	28%	20%	13%	2.07	88
	Change of pay	54%	12%	14%	20%	2	85
	Enforce employee mask wearing	47%	30%	9%	14%	1.89	88
	Daily testing/temperature monitoring	65%	19%	7%	9%	1.6	89

Overall		Not at all	A little	Mostly	Entirely	Mean	N
To what extent have you done the following due to COVID-19?	Canceled group or special events	16%	7%	32%	45%	3.06	168
	Temporarily reduced our work force	30%	30%	25%	15%	2.26	166
	Compensated employees for missing work	46%	21%	17%	16%	2.03	121
	Employees work remotely	44%	31%	17%	8%	1.9	130
	Provided sick leave to employees who don't currently have it	71%	14%	4%	11%	1.54	104

The Montana Expression 2020: Impact of COVID-19 on Montana's Tourism Related Businesses – Wave 4

2020

Overall		N	%
Now that masks are required in most public spaces including businesses, has it been difficult to enforce with your customers?	Yes, very difficult	21	10%
	Yes, somewhat difficult	55	25%
	Very little difficulty	65	30%
	Not difficult at all	76	35%
	Total	217	100%

Overall		N	%
How have your bookings/reservations changed for this August compared to August 2019?	Increased	10	5%
	Decreased	145	79%
	About the same	29	16%
	Total	184	100%

Overall		N	%
How have your bookings/reservations changed for this September compared to September 2019?	Increased	12	7%
	Decreased	135	75%
	About the same	33	18%
	Total	180	100%

Overall		N	%
How have your bookings/reservations changed for this Fall compared to Fall 2019?	Increased	8	5%
	Decreased	122	76%
	About the same	30	19%
	Total	160	100%

The Montana Expression 2020: Impact of COVID-19 on Montana's Tourism Related Businesses – Wave 4

2020

Overall		N	%
How have your bookings/reservations changed for this Winter compared to Winter 2019?	Increased	2	2%
	Decreased	62	61%
	About the same	38	37%
	Total	102	100%

Overall		N	%
Compared to this time last year, how have your inquiries changed?	Increased	38	17%
	Decreased	136	61%
	About the same	48	22%
	Total	222	100%

The Montana Expression 2020: 2020 Impact of COVID-19 on Montana's Tourism Related Businesses – Wave 4

Accommodations

Accommodations		Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree	Mean	N
Because of COVID-19, I...	Modified our cancellation policies	8%	6%	9%	32%	45%	3.99	107
	Will have a shorter summer season	20%	12%	12%	29%	28%	3.33	104
	Reduced my inventory	20%	14%	26%	27%	13%	2.99	85
	Reduced my pricing	27%	17%	14%	19%	24%	2.96	101
	Changed our target markets	16%	19%	32%	18%	14%	2.95	98
	Reduced marketing	21%	24%	25%	18%	13%	2.78	101
	Temporarily closed my business (either by choice or by mandate)	43%	17%	6%	13%	21%	2.52	97
	Increased marketing	26%	25%	32%	13%	5%	2.48	98
	Partnered with other business to create special packages/marketing	31%	24%	33%	8%	4%	2.29	83
	Will not be opening this season	54%	26%	7%	3%	10%	1.89	91
	Increased my pricing	51%	29%	16%	4%	0%	1.73	94
	Will expand my business	58%	23%	18%	1%	1%	1.65	97
	Permanently closed (or will close) my business	64%	21%	8%	2%	5%	1.62	89

The Montana Expression 2020: 2020 Impact of COVID-19 on Montana's Tourism Related Businesses – Wave 4

		Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Mean	N
Accommodations								
To what extent do you agree with the following...	I'm worried about how long this economic recovery will take	3%	3%	5%	19%	71%	4.53	111
	My business will forever change our cleaning protocol	5%	14%	14%	40%	28%	3.73	111
	My business cannot survive a slow recovery	3%	14%	32%	23%	28%	3.59	104
	I am concerned about the health of my family based on reopening	16%	18%	18%	30%	19%	3.19	110
	I am concerned about my personal health based on reopening	17%	18%	18%	29%	17%	3.11	110
	I am concerned about the health of my community based on reopening	16%	24%	20%	26%	15%	3.01	110

The Montana Expression 2020: 2020 Impact of COVID-19 on Montana's Tourism Related Businesses – Wave 4

Accommodations		Not an Issue	Slight Issue	Moderate Issue	Big Issue	Mean	N
To what extent do you experience the following workforce issues?	Hiring new part-time workforce	7%	4%	26%	63%	3.46	46
	Desire to work	9%	9%	18%	64%	3.38	45
	Hiring new full-time workforce	11%	0%	28%	61%	3.37	43
	Hiring new temporary workforce	20%	4%	22%	53%	3.09	45
	Keep existing workforce	9%	28%	35%	28%	2.83	46
	Qualified Employees	20%	18%	27%	36%	2.78	45
	Concern around safe workplace	31%	31%	24%	13%	2.20	45
	Safety protocol adherence	30%	37%	22%	11%	2.13	46
	Change of pay	49%	14%	19%	19%	2.07	43
	Employee work environment	39%	30%	25%	7%	2.00	44
	Enforce employee mask wearing	42%	31%	16%	11%	1.96	45
	Daily testing/temperature monitoring	69%	16%	4%	11%	1.58	45

Accommodations		Not at all	A little	Mostly	Entirely	Mean	N
To what extent have you done the following due to COVID-19?	Canceled group or special events	20%	6%	35%	39%	2.94	71
	Temporarily reduced our work force	30%	31%	25%	14%	2.23	77
	Compensated employees for missing work	43%	17%	22%	18%	2.17	68
	Provided sick leave to employees who don't currently have it	65%	10%	8%	17%	1.77	48
	Employees work remotely	65%	28%	4%	3%	1.47	51

The Montana Expression 2020: Impact of COVID-19 on Montana's Tourism Related Businesses – Wave 4

2020

Accommodations	N	%	
Now that masks are required in most public spaces including businesses, has it been difficult to enforce with your customers?	Yes, very difficult	9	8%
	Yes, somewhat difficult	29	27%
	Very little difficulty	31	28%
	Not difficult at all	40	37%
	Total	109	100%

Accommodations	N	%	
How have your bookings/reservations changed for this August compared to August 2019?	Increased	7	6%
	Decreased	94	78%
	About the same	20	17%
	Total	121	100%

Accommodations	N	%	
How have your bookings/reservations changed for this September compared to September 2019?	Increased	9	8%
	Decreased	87	73%
	About the same	23	19%
	Total	119	100%

Accommodations	N	%	
How have your bookings/reservations changed for this Fall compared to Fall 2019?	Increased	6	6%
	Decreased	83	76%
	About the same	20	18%
	Total	109	100%

The Montana Expression 2020: Impact of COVID-19 on Montana's Tourism Related Businesses – Wave 4

2020

Accommodations	N	%	
How have your bookings/reservations changed for this Winter compared to Winter 2019?	Increased	1	1%
	Decreased	46	59%
	About the same	31	40%
	Total	78	100%

Accommodations	N	%	
Compared to this time last year, how have your inquiries changed?	Increased	19	16%
	Decreased	72	62%
	About the same	25	22%
	Total	116	100%

Accommodations	N	%	
Main Business Categories	Hotel/Motel	55	45%
	Bed & Breakfast	10	8%
	Rental home/condo/cabin	29	24%
	Campgrounds	14	11%
	Guest ranch	14	11%
	Overall	122	100%

The Montana Expression 2020: 2020 Impact of COVID-19 on Montana's Tourism Related Businesses – Wave 4

Tourism Services

Tourism Services		Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree	Mean	N
Because of COVID-19, I...	Reduced my inventory	7%	7%	12%	47%	28%	3.81	43
	Temporarily closed my business (either by choice or by mandate)	19%	2%	9%	21%	49%	3.79	43
	Will have a shorter summer season	15%	5%	10%	29%	42%	3.78	41
	Modified our cancellation policies	9%	9%	24%	21%	36%	3.67	33
	Reduced marketing	14%	14%	19%	31%	21%	3.31	42
	Changed our target markets	14%	11%	38%	27%	11%	3.11	37
	Partnered with other business to create special packages/marketing	16%	25%	38%	13%	9%	2.75	32
	Increased marketing	32%	24%	20%	12%	12%	2.49	41
	Reduced my pricing	33%	18%	30%	13%	8%	2.45	40
	Will expand my business	39%	22%	34%	5%	0%	2.05	41
	Increased my pricing	42%	18%	40%	0%	0%	1.97	38
	Will not be opening this season	61%	8%	11%	11%	8%	1.97	36
	Permanently closed (or will close) my business	53%	20%	15%	5%	8%	1.95	40

The Montana Expression 2020: 2020 Impact of COVID-19 on Montana's Tourism Related Businesses – Wave 4

		Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Mean	N
Tourism Services								
To what extent do you agree with the following...	I'm worried about how long this economic recovery will take	0%	0%	9%	28%	64%	4.55	47
	My business will forever change our cleaning protocol	7%	7%	22%	44%	20%	3.64	45
	I am concerned about the health of my community based on reopening	24%	4%	13%	41%	17%	3.24	46
	My business cannot survive a slow recovery	12%	21%	28%	14%	26%	3.21	43
	I am concerned about the health of my family based on reopening	27%	4%	9%	42%	18%	3.2	45
	I am concerned about my personal health based on reopening	24%	9%	13%	37%	17%	3.15	46

The Montana Expression 2020: 2020 Impact of COVID-19 on Montana's Tourism Related Businesses – Wave 4

Tourism Services		Not an Issue	Slight Issue	Moderate Issue	Big Issue	Mean	N
To what extent do you experience the following workforce issues?	Hiring new full-time workforce	36%	4%	28%	32%	2.56	25
	Hiring new part-time workforce	36%	8%	20%	36%	2.56	25
	Desire to work	24%	24%	24%	28%	2.56	25
	Hiring new temporary workforce	44%	4%	20%	32%	2.4	25
	Keep existing workforce	20%	44%	16%	20%	2.36	25
	Qualified Employees	40%	12%	20%	28%	2.36	25
	Concern around safe workplace	20%	52%	8%	20%	2.28	25
	Employee work environment	44%	28%	12%	16%	2	25
	Change of pay	65%	4%	4%	26%	1.91	23
	Safety protocol adherence	44%	40%	8%	8%	1.8	25
	Daily testing/temperature monitoring	60%	28%	8%	4%	1.56	25
Enforce employee mask wearing	71%	17%	4%	8%	1.5	24	

Tourism Services		Not at all	A little	Mostly	Entirely	Mean	N
To what extent have you done the following due to COVID-19?	Canceled group or special events	10%	5%	30%	55%	3.3	40
	Temporarily reduced our work force	29%	34%	16%	21%	2.29	38
	Employees work remotely	28%	44%	19%	9%	2.09	32
	Compensated employees for missing work	41%	26%	22%	11%	2.04	27
	Provided sick leave to employees who don't currently have it	71%	25%	0%	4%	1.38	24

The Montana Expression 2020: Impact of COVID-19 on Montana's Tourism Related Businesses – Wave 4

2020

Tourism Services		N	%
Now that masks are required in most public spaces including businesses, has it been difficult to enforce with your customers?	Yes, very difficult	7	15%
	Yes, somewhat difficult	9	19%
	Very little difficulty	14	30%
	Not difficult at all	17	36%
	Total	47	100%

Tourism Services		N	%
How have your bookings/reservations changed for this August compared to August 2019?	Increased	1	4%
	Decreased	24	86%
	About the same	3	11%
	Total	28	100%

Tourism Services		N	%
How have your bookings/reservations changed for this September compared to September 2019?	Increased	1	4%
	Decreased	22	85%
	About the same	3	12%
	Total	26	100%

Tourism Services		N	%
How have your bookings/reservations changed for this Fall compared to Fall 2019?	Increased	1	5%
	Decreased	16	80%
	About the same	3	15%
	Total	20	100%

The Montana Expression 2020: Impact of COVID-19 on Montana's Tourism Related Businesses – Wave 4

2020

Tourism Services		N	%
How have your bookings/reservations changed for this Winter compared to Winter 2019?	Increased	0	0%
	Decreased	6	67%
	About the same	3	33%
	Total	9	100%

Tourism Services		N	%
Compared to this time last year, how have your inquiries changed?	Increased	6	14%
	Decreased	28	67%
	About the same	8	19%
	Total	42	100%

Tourism Services		N	%
Main Business Categories	Restaurant/Bar	4	8%
	Brewery/Distillery	3	6%
	Convenience store/gas station	1	2%
	Other transportation services	3	6%
	Specialty retail	7	14%
	Other outdoor recreation	8	16%
	General retail	7	14%
	Vehicle retail (car/truck/SUV)	1	2%
	Museum/interpretive center	16	31%
	Artist/crafter ("Made in MT" products)	1	2%
	Overall	51	1

The Montana Expression 2020: 2020 Impact of COVID-19 on Montana's Tourism Related Businesses – Wave 4

Outfitters/Guides

Outfitter/Guide		Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree	Mean	N
Because of COVID-19, I...	Temporarily closed my business (either by choice or by mandate)	0%	11%	5%	53%	32%	4.05	19
	Reduced my inventory	7%	0%	13%	47%	33%	4	15
	Will have a shorter summer season	0%	21%	0%	37%	42%	4	19
	Modified our cancellation policies	10%	10%	10%	25%	45%	3.85	20
	Reduced marketing	5%	15%	30%	30%	20%	3.45	20
	Changed our target markets	6%	28%	44%	17%	6%	2.89	18
	Increased marketing	32%	21%	21%	16%	11%	2.53	19
	Permanently closed (or will close) my business	39%	33%	11%	6%	11%	2.17	18
	Will not be opening this season	39%	39%	6%	6%	11%	2.11	18
	Partnered with other business to create special packages/marketing	31%	39%	23%	8%	0%	2.08	13
	Reduced my pricing	55%	10%	15%	20%	0%	2	20
	Increased my pricing	55%	15%	20%	5%	5%	1.9	20
Will expand my business	55%	35%	10%	0%	0%	1.55	20	

The Montana Expression 2020: **2020**
 Impact of COVID-19 on Montana's Tourism Related
 Businesses – Wave 4

		Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Mean	N
Outfitter/Guide								
To what extent do you agree with the following...	I'm worried about how long this economic recovery will take	0%	0%	0%	24%	76%	4.76	21
	I am concerned about the health of my family based on reopening	14%	5%	19%	33%	29%	3.57	21
	My business cannot survive a slow recovery	5%	19%	19%	33%	24%	3.52	21
	I am concerned about the health of my community based on reopening	10%	5%	38%	33%	14%	3.38	21
	My business will forever change our cleaning protocol	5%	10%	43%	29%	14%	3.38	21
	I am concerned about my personal health based on reopening	19%	5%	24%	29%	24%	3.33	21

The Montana Expression 2020: 2020 Impact of COVID-19 on Montana's Tourism Related Businesses – Wave 4

Guide/Outfitter		Not an Issue	Slight Issue	Moderate Issue	Big Issue	Mean	N
To what extent do you experience the following workforce issues?	Keep existing workforce	40%	10%	20%	30%	3.00	10
	Hiring new part-time workforce	30%	20%	10%	40%	2.80	10
	Concern around safe workplace	30%	30%	0%	40%	2.70	10
	Hiring new temporary workforce	40%	0%	20%	40%	2.60	10
	Desire to work	30%	20%	30%	20%	2.60	10
	Safety protocol adherence	10%	20%	30%	40%	2.50	10
	Qualified Employees	10%	30%	40%	20%	2.50	10
	Enforce employee mask wearing	30%	30%	0%	40%	2.50	10
	Hiring new full-time workforce	30%	0%	30%	40%	2.40	10
	Employee work environment	70%	10%	0%	20%	2.40	10
	Change of pay	50%	10%	20%	20%	2.10	10
	Daily testing/temperature monitoring	20%	30%	30%	20%	1.70	10

Outfitter/Guide		Not at all	A little	Mostly	Entirely	Mean	N
To what extent have you done the following due to COVID-19?	Canceled group or special events	26%	11%	21%	42%	2.79	19
	Temporarily reduced our work force	30%	30%	25%	15%	2.41	17
	Compensated employees for missing work	55%	0%	18%	27%	2.18	11
	Employees work remotely	46%	18%	27%	9%	2	11
	Provided sick leave to employees who don't currently have it	78%	11%	0%	11%	1.44	9

The Montana Expression 2020: Impact of COVID-19 on Montana's Tourism Related Businesses – Wave 4

2020

Outfitter/Guide	N	%	
Now that masks are required in most public spaces including businesses, has it been difficult to enforce with your customers?	Yes, very difficult	3	14%
	Yes, somewhat difficult	7	33%
	Very little difficulty	4	19%
	Not difficult at all	7	33%
	Total	21	100%

Outfitter/Guide	N	%	
How have your bookings/reservations changed for this August compared to August 2019?	Increased	1	5%
	Decreased	17	81%
	About the same	3	14%
	Total	21	100%

Outfitter/Guide	N	%	
How have your bookings/reservations changed for this September compared to September 2019?	Increased	1	5%
	Decreased	15	71%
	About the same	5	24%
	Total	21	100%

Outfitter/Guide	N	%	
How have your bookings/reservations changed for this Fall compared to Fall 2019?	Increased	0	0%
	Decreased	14	74%
	About the same	5	26%
	Total	19	100%

The Montana Expression 2020: Impact of COVID-19 on Montana's Tourism Related Businesses – Wave 4

2020

Outfitter/Guide	N	%	
How have your bookings/reservations changed for this Winter compared to Winter 2019?	Increased	1	17%
	Decreased	3	50%
	About the same	2	33%
	Total	6	100%

Outfitter/Guide	N	%	
Compared to this time last year, how have your inquiries changed?	Increased	3	14%
	Decreased	13	62%
	About the same	5	24%
	Total	21	100%

The Montana Expression 2020: 2020 Impact of COVID-19 on Montana's Tourism Related Businesses – Wave 4

Tourism Support Services

Tourism Support Services		Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree	Mean	N
Because of COVID-19, I...	Modified our cancellation policies	4%	4%	24%	40%	28%	3.84	25
	Will have a shorter summer season	11%	17%	14%	36%	22%	3.42	36
	Reduced marketing	14%	16%	16%	27%	27%	3.38	37
	Changed our target markets	6%	20%	20%	40%	14%	3.37	35
	Reduced my inventory	13%	17%	13%	46%	13%	3.29	24
	Partnered with other business to create special packages/marketing	15%	15%	29%	32%	9%	3.06	34
	Temporarily closed my business (either by choice or by mandate)	29%	11%	11%	26%	23%	3.03	36
	Reduced my pricing	19%	30%	30%	15%	7%	2.63	27
	Increased marketing	29%	24%	18%	18%	11%	2.58	38
	Will not be opening this season	28%	31%	25%	6%	9%	2.38	32
	Increased my pricing	29%	32%	29%	7%	4%	2.25	28
	Will expand my business	38%	27%	27%	9%	0%	2.06	34
	Permanently closed (or will close) my business	52%	26%	16%	3%	3%	1.81	31

The Montana Expression 2020: **2020**
 Impact of COVID-19 on Montana's Tourism Related
 Businesses – Wave 4

Tourism Support Services		Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Mean	N
To what extent do you agree with the following...	I'm worried about how long this economic recovery will take	0%	2%	2%	30%	66%	4.59	44
	My business will forever change our cleaning protocol	5%	10%	24%	41%	21%	3.64	42
	I am concerned about the health of my community based on reopening	9%	14%	19%	30%	28%	3.53	43
	I am concerned about the health of my family based on reopening	15%	15%	13%	18%	39%	3.49	39
	My business cannot survive a slow recovery	8%	13%	39%	18%	23%	3.36	39
	I am concerned about my personal health based on reopening	16%	16%	19%	30%	19%	3.19	43

The Montana Expression 2020: 2020 Impact of COVID-19 on Montana's Tourism Related Businesses – Wave 4

Tourism Support Services		Not an Issue	Slight Issue	Moderate Issue	Big Issue	Mean	N
To what extent do you experience the following workforce issues?	Concern around safe workplace	22%	34%	22%	22%	2.44	9
	Employee work environment	33%	34%	11%	22%	2.22	9
	Keep existing workforce	11%	67%	22%	0%	2.11	9
	Hiring new temporary workforce	56%	11%	0%	33%	2.11	9
	Safety protocol adherence	45%	22%	22%	11%	2	9
	Hiring new full-time workforce	45%	33%	11%	11%	1.89	9
	Hiring new part-time workforce	56%	22%	0%	22%	1.89	9
	Qualified Employees	56%	0%	44%	0%	1.89	9
	Enforce employee mask wearing	33%	56%	0%	11%	1.89	9
	Desire to work	56%	22%	11%	11%	1.78	9
	Change of pay	56%	22%	11%	11%	1.78	9
	Daily testing/temperature monitoring	56%	22%	22%	0%	1.67	9

Tourism Support Services		Not at				Mean	N
		all	A little	Mostly	Entirely		
To what extent have you done the following due to COVID-19?	Canceled group or special events	11%	11%	31%	47%	3.16	38
	Employees work remotely	28%	28%	30%	14%	2.31	36
	Temporarily reduced our work force	32%	24%	35%	9%	2.21	34
	Compensated employees for missing work	52%	35%	3%	10%	1.72	29
	Provided sick leave to employees who don't currently have it	83%	13%	0%	4%	1.26	23

The Montana Expression 2020: Impact of COVID-19 on Montana's Tourism Related Businesses – Wave 4

2020

Tourism Support Services		N	%
Now that masks are required in most public spaces including businesses, has it been difficult to enforce with your customers?	Yes, very difficult	2	5%
	Yes, somewhat difficult	10	25%
	Very little difficulty	16	40%
	Not difficult at all	12	30%
	Total	40	100%

Tourism Support Services		N	%
How have your bookings/reservations changed for this August compared to August 2019?	Increased	1	7%
	Decreased	10	71%
	About the same	3	21%
	Total	14	100%

Tourism Support Services		N	%
How have your bookings/reservations changed for this September compared to September 2019?	Increased	1	7%
	Decreased	11	79%
	About the same	2	14%
	Total	14	100%

Tourism Support Services		N	%
How have your bookings/reservations changed for this Fall compared to Fall 2019?	Increased	1	8%
	Decreased	9	75%
	About the same	2	17%
	Total	12	100%

The Montana Expression 2020: Impact of COVID-19 on Montana's Tourism Related Businesses – Wave 4

2020

Tourism Support Services		N	%
How have your bookings/reservations changed for this Winter compared to Winter 2019?	Increased	0	0%
	Decreased	7	78%
	About the same	2	22%
	Total	9	100%

Tourism Support Services		N	%
Compared to this time last year, how have your inquiries changed?	Increased	10	23%
	Decreased	23	53%
	About the same	10	23%
	Total	43	100%

Tourism Support Services		N	%
Main Business Categories	Auto repair	1	2%
	Real estate	1	2%
	Land Management	4	8%
	Rental management	1	2%
	Tourism promotion/advertising agencies	14	29%
	Event coordinator/manager	4	8%
	Association director/manager	4	8%
	Construction	2	4%
	Media	2	4%
	Other	11	22%
	Other service industry	5	10%
	Overall	49	100%

The Montana Expression 2020: **2020** Impact of COVID-19 on Montana's Tourism Related Businesses – Wave 4

Summary and Conclusions

Results from the 4th round of the COVID business survey indicate similar trend data to that of the previous three iterations (for results from the previous three surveys, [click here](#)). Overall, businesses stated that because of COVID-19, they were forced to modify their cancellation policies (mean = 3.90), shorten their summer season (mean = 3.50), and reduce their inventory (mean = 3.34). Additionally, tourism related business across Montana, regardless of their classification (e.g. Accommodations, Outfitter/Guide, etc.), expressed their worries concerning how long the economic recovery will take (mean = 4.57).

Potential or actual liability related to conducting business was also a concern for businesses across each category. On average, Outfitters and Guides were the least concerned about potential or actual liability (mean = 2.05) while Tourism Support Services were the most concerned (mean = 2.96). With respect to inquiries and bookings over the course of the summer as well as upcoming winter months, each business category reported that their inquiries and/or bookings decreased for the 2020 season compared to 2019. This was true for the months of August and September, as well as (then) upcoming Fall and Winter seasons. For additional information regarding the opinions and perceptions expressed by tourism related businesses in Montana, results can be found on ITRR's [publication website](#). Throughout the course of the pandemic, ITRR will continue to provide longitudinal data related to the opinions and perceptions of tourism related business across the state of Montana.

References/citations

Johns Hopkins University. (2020). Coronavirus Resource Center. Accessed 10/12/20 from <https://coronavirus.jhu.edu/map.html>

National Park Service. (2020). NPS Stats. Retrieved October 12, 2020, from <https://irma.nps.gov/STATS/Reports/Park/YELL>