“SUSTAINING PARADISE”

A report on the critical concerns affecting our tourism-related economy's ability to operate successfully and sustainably into the future

SEPTEMBER 2025
TOURISM BUSINESS SURVEY

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BACKGROUND

The outdoor recreation economy is a significant and growing contributor to the U.S. economy generating an estimated $1.2 trillion dollars in economic output in 2023.[1]

Montana ranks third among 50 states in terms of outdoor recreation's contribution to its economy, contributing 4.6% of state gross domestic product (GDP) and representing some 30,920 jobs and $1.64 billion in wages.[2] An estimated 13.7 million visitors to Montana spent $5 billion in 2024; one-in-15 workers were supported by out-of-state travel; and $308 million in state and local taxes were generated by non-resident visitors.[3] The majority of supported jobs were in the retail trade; accommodation and food services; and arts, entertainment, and recreation sectors.

Park County, Montana, garners more than its equal share of Montana's natural amenities as its scenic qualities, public lands, proximity to Yellowstone National Park, and abundant recreational offerings attract increasing numbers of tourists and new residents, supporting a wide range of businesses and generating substantial economic output, estimated to exceed $500 million annually.[4]

As increasing numbers of people discover Park County, its quality of life, and recreational amenities, the benefits also come with liabilities.

In conversations with local businesses and borne out by surveys and the experience of other high-amenity communities, the influx of visitors and new residents (especially part-time and short-term rentals) represents a boon for many businesses, but longer-term residents and business owners experience impacts as well.[5] In particular, they note that the very attributes that draw people to the region (e.g., natural beauty, community, and culture) are in danger of being diminished and lost, adversely impacting both the outdoor recreation/tourism economy as well as the community and surrounding natural resources.

PROJECT GOAL

Wild Livelihoods is a coalition of Montana businesses in the northern Greater Yellowstone Region whose livelihoods are linked to the outdoors and wild places. Their mission is to give a voice to these local businesses by connecting business owners and customers who share common values around open spaces, clean water, clean air, and sustainable, biodiverse wildlife populations.

In 2024, Wild Livelihoods, with the assistance of PERC, undertook a survey to poll businesses in the Livingston, Paradise Valley, Gardiner, and Cooke City/Silver Gate areas on their views and concerns as well as gain some socio-economic background on that business community. The survey and three hosted events seek to identify the issues that "keep us up at night" and direct the development of recommendations—solutions targeted to improve both the natural resources on which the region's businesses depend and the overall longevity and prosperity of their businesses.

The following report provides a summary of survey results.

METHODS

The survey's target businesses derive at least 20% of their revenues from, or due to, outdoor recreation and tourism in the region. A list of 872 businesses in the Livingston, Paradise Valley, Gardiner, and Cooke City/Silver Gate areas was assembled from a variety of sources, including the Livingston and Gardiner Chambers of Commerce and Wild Livelihoods Coalition membership (Exhibit A). The strategy was to distribute the survey opportunity broadly throughout the full business community while recognizing that the target audience was much narrower.

The survey instrument (Exhibit B) was drafted and circulated among the Wild Livelihoods Coalition leadership and selected businesses for review and revision. To gain the highest possible response rate, the instrument was intentionally brief and concise, requiring no more than 12-15 minutes to complete. The survey was uploaded to a Google Form, beta tested by the team for functionality and user friendliness, and distributed beginning in May 2024.

Distribution of the survey was accomplished through emails to the assembled contact list with a link to the Google Form survey; posting to Coalition and partner websites; and the placement of an ad in the Gardiner newspaper. In addition, members of the study team and volunteers canvassed businesses in Livingston and Gardiner providing postcards with QR codes and paper copies of the survey, with SASE, on request.

Survey participants, using the Google Form platform, were able to leave their survey and return to the autosaved copy. Upon completion they received an email confirming

receipt and were able to receive a copy of their responses if requested. All surveys returned by mail were individually posted to the Google Form by Whitney Tilt to ensure a single, comprehensive dataset.

Participation and Privacy

Participation in the survey was entirely voluntary, and respondents could elect to remain anonymous. All responses were treated as confidential as to the individual's identity and specific responses. Responses were used solely to craft generalized business profiles and capture the attitudes and opinions prevalent within the business community. Where specific responses were provided (Exhibits C and D) or highlighted to illustrate a specific finding, they were presented anonymously, ensuring no direct attribution to any individual or business.

Sharing of Results

A summary of survey results was shared with participants in community discussions on May 23 in Livingston, April 3 in Gardiner, and May 28 in Cooke City. Copies of this report are posted to Wild Livelihoods and partner websites as well as sent directly to all respondents via email.

RESULTS

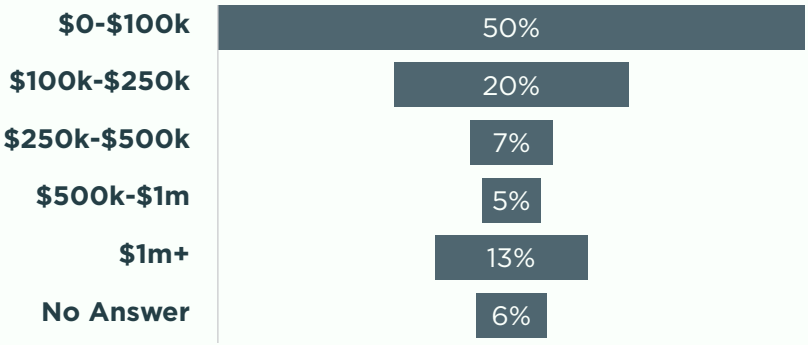
As of January 22, 2025, 104 Business owners responded to the survey. The results are tabulated here.

1-2. Name and Business

Of the 104 respondents, 89 provided at least their first name; 15 responded "anonymous."

3. Estimated Revenue from Tourism

Question 3 Revenue % by Annual Sales



4. Type of Business

Respondents were asked to describe the nature of their business, or businesses, from a list of 26 business classifications provided.[6] Forty-one respondents listed two or more (e.g., Retail and Food Services).

Retail, outdoor outfitting, food services, and accommodations accounted for 67% of the businesses responding.

Question 4 Target Business Demographics

Type of Business	Freq.	%
Retail (gift shops, clothing, sporting goods, grocery, outdoor rentals)	50	25%
Outdoor Outfitters (incl. guides, tour operators, scenic/sightseeing)	45	22%
Food Services (restaurants/bars/catering, etc.)	22	11%
Accommodations (incl. campgrounds & RV parks)	19	9%
Business Services (incl. financial, information, travel/reservations)	15	7%
Real estate, rental & leasing, property management, brokers/agents	12	6%
Education & Health Services (incl. museums)	10	5%
Independent Artist, Musical Arts, Performing Arts and Related	9	4%
Construction, Manufacturing, Repair & Maintenance	9	4%
Agriculture and Forestry	7	3%
Community & Social Advocacy Organizations	6	3%
Personal Care Services (hair, nail, pet services)	1	0%

5. Types of recreational activities your customers seek

Survey asked respondents to select types of recreational activities their customers planned to participate in, selecting all that applied from a prepopulated list.

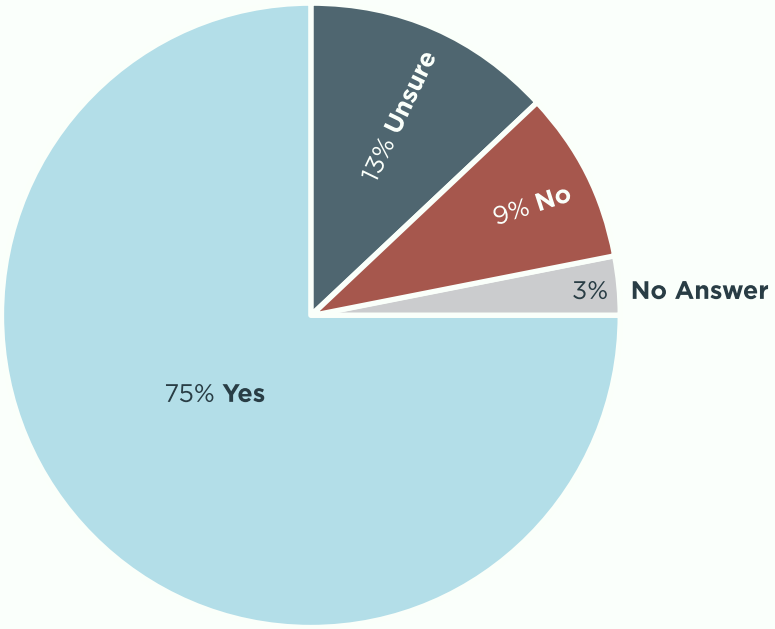
Question 5 Types of Activities by Customer Planned Participation

Activity	Freq.	%
Wildlife	88	19%
Hiking & Walking	81	17%
Fishing	72	15%
Camping	46	10%
Snow Sports	37	8%
Water sports	34	7%
Hunting	31	7%
Biking	30	6%
Cultural, Natural History, Photography	17	4%
Off roading	11	2%
Other	20	4%

6. Do you feel optimistic about the future of your business?

Three out of four businesspeople who participated in the survey responded that they were optimistic about the future of their business. Fourteen of the 104 respondents were unsure, while nine said no.

Question 6 Optimism About the Future of Respondent's Businesses



7. For each of the following, please rank its level of challenge to you as a business.

Asked to rank their level of concern for seven business challenges, respondents were generally not concerned with providing customers a quality outdoor experience (53% not an issue/15% significant or growing issue) or attracting or keeping customers (36% not an issue/20% significant or growing issue). Respondents expressed a mixed reaction to finding/keeping the right staff, with 46% indicating not an issue/somewhat an issue while 41% rated it a significant or growing issue.

The lack of employee housing due to cost, lack of availability, etc., was of significant concern to many businesses, with 58% rating housing a significant or growing issue, and 21% indicating no issue.

Question 7 Issues Faced by Local Business Owners

Three questions addressed the management of natural resources:

- The survey found mixed concerns over public land management agency regulations, permitting, etc., with 30% rating it a significant or growing issue, 38% a somewhat or neutral issue, and 32% finding no issue.

- 70% expressed some level of concern with overcrowding/degraded access to the outdoors: 15% indicated it as a significant issue; 33% as a growing issue; and 22% as somewhat an issue.

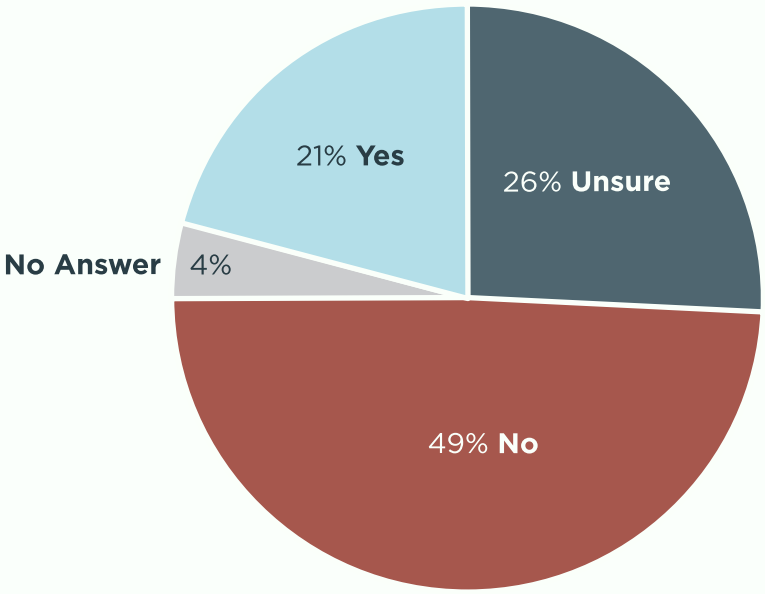
- When asked to express levels of satisfaction with Montana wildlife management policies, 46% rated their dissatisfaction as a significant or growing issue; 31% found it somewhat or a neutral issue; and 23% found no issue.

Many of these issues and concerns were recurrent when asked, "What is the one thing you would like to see done to help both your business and the region's natural resources" (Question 16), and "As it relates to natural resources and your business, what is the one thing that keeps you up at night?" (Question 17).

8. Do you feel optimistic about the future of natural resource management in your area?

While three out of four participating business owners expressed optimism about the future of their business (Question 6), that optimism did not extend to the future of natural resource management. Fifty-one of the 104 respondents said no, while another 28 indicated they were not sure—fully 75% expressed little or no optimism—a direct opposite of the expression of optimism for their business future.

Question 8 Optimism About The Future of Area Natural Resources



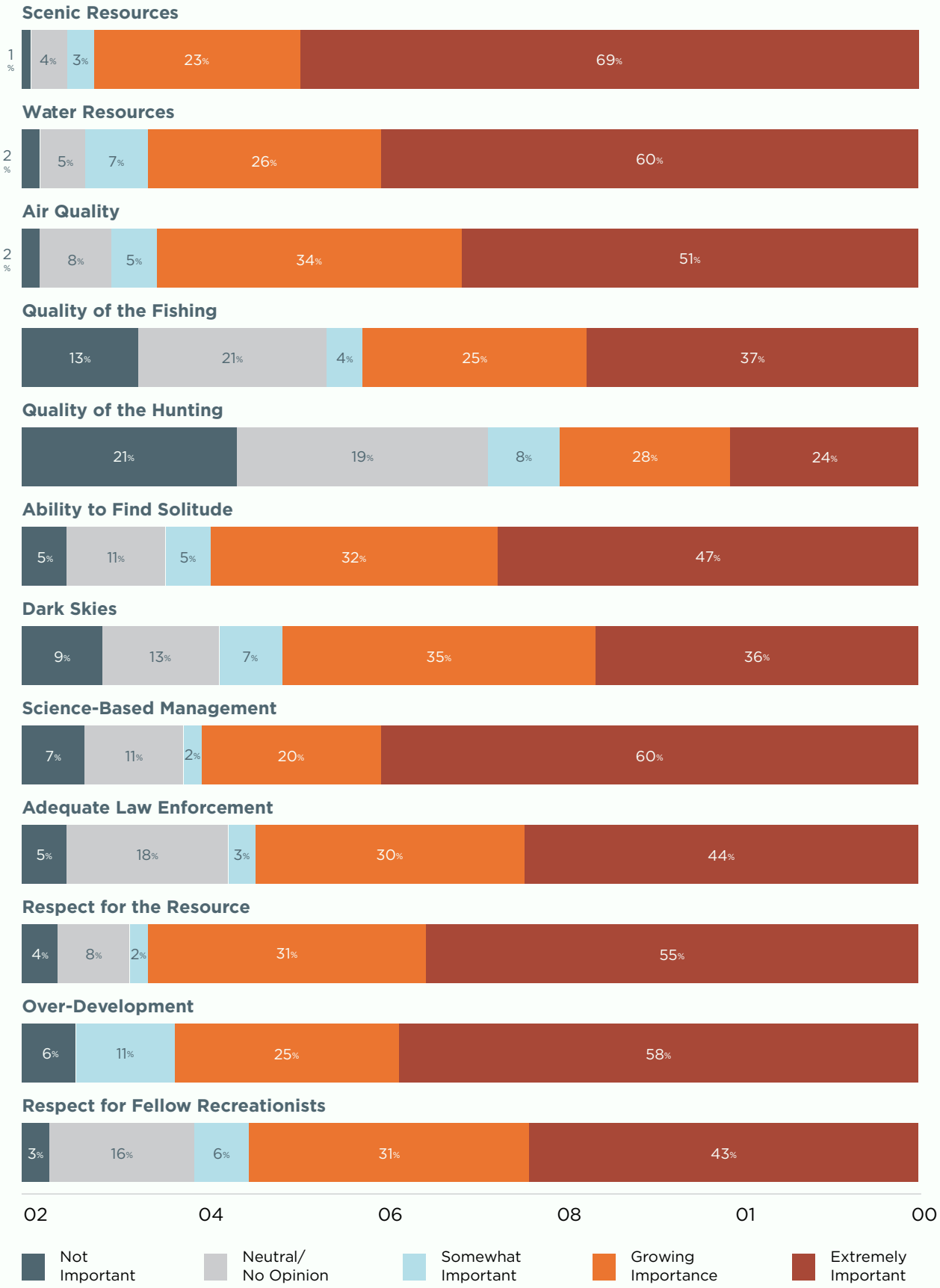
9. Thinking about the natural resources your business relies on, over the last five years, how would you rate the following?

To gain a sense of the importance of specific natural resource-based issues, the survey asked respondents to rate the following 12 topics.

Scenic resources were the top concern, with 92% viewing them as extremely important (69%) or of growing importance (23%). Water and air resources were also rated high in importance (86% and 85% respectively). The ability to find solitude (79%) and "dark skies" (human light pollution, 71%) also ranked high in importance, while the quality of fishing (62%) and quality of hunting (52%) ranked lower overall in importance.

Concerning human behavior and management needs, 86% of respondents ranked respect for the resource as extremely important or of growing concern, followed by concerns for overdevelopment (83%), science-based management (80%), adequate law enforcement (74%), and respect for fellow recreationists (74%).

Question 9 Importance of Natural Resources to Respondents



10. **Thinking about your clientele, please rate the following by importance to their experience.** (Best guess/ optional)

11. **The Greater Yellowstone Ecosystem is known for its wildlife. Please rate the following based on their importance to your business and customers.**

Looking to gain insight into the motivations of visitors and other customers, responding businesses ranked viewing wildlife as the top motivation (90% very important or important), followed by educational experiences (81%), Yellowstone's thermal features (73%), spending time with family or friends (68%), having an adventure (67%), photography (65%), and quality lodging, foods, and beverage (65%). Fifty-six percent of responding businesses ranked quality hunting and fishing as important, while only 30% considered successful harvest of fish or game to be important.

Question 10 Importance of Activities to Customer Experience

Activity	Very Important	Important	Not Important
Viewing Wildlife	71%	19%	0%
Educational experiences/ learning about nature	41%	40%	1%
Seeing geysers or other thermal features	39%	34%	3%
Spending time with family or friends	42%	26%	2%
Having an adventure	34%	33%	4%
Photography (professional or amateur)	30%	35%	5%
Quality of hunting/fishing	28%	28%	14%
High-quality lodging, food, and beverage	28%	37%	2%
Successful harvest of fish or game	9%	21%	23%

Not surprisingly, given that their backyard is Yellowstone National Park, when businesses were asked to rate the importance of various kinds of wildlife, the two top-ranked types of wildlife were ungulates (e.g., bison, elk), at 89% very important or important, and carnivores (e.g., wolves and bears) at 87%. Other types of fish and wildlife were not ignored, but not considered the top draws.

Question 11 Importance of Wildlife to Business Success

Wildlife	Very Important	Important	Not Important
Ungulates (bison, elk, bighorn sheep, pronghorn)	63%	26%	0%
Carnivores (grizzly bear, wolf, coyote, mt. lion)	78%	9%	1%
Birds of prey (eagles, falcons, hawks)	45%	36%	1%
Fish (trout, whitefish, etc.)	45%	30%	4%
Other wildlife	35%	36%	1%
Other birds (songbirds, jays, corvids, etc.)	20%	33%	11%

12. Please indicate your level of agreement or disagreement with the following statements.

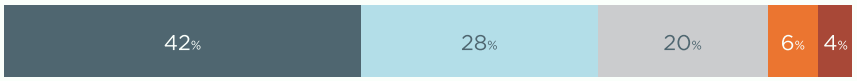
To plumb how surveyed businesses felt about various issues, they were asked their level of agreement or disagreement with the following eight statements.

Statement 1 *Gateway Branding.* Building on a Yellowstone gateway community brand for responsible outdoor recreation activities and products will help protect and enhance the region's wildlife and natural resources. Strong accord with 77% in agreement and 8% disagreeing.

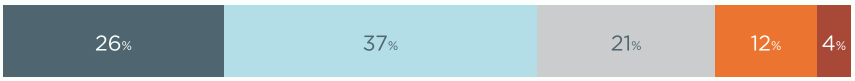
Statement 2 *Revenue.* We need to be more proactive on how to collaboratively raise new revenues (private or public) for wildlife. Overall consensus with 74% in agreement and 7% disagreeing.

Statement 3 *Recreation & Community.* Increasing participation in outdoor recreation is good for the community and will also increase advocacy for conservation of the region's natural resources. Overall accord with 72% in agreement and 10% disagreeing.

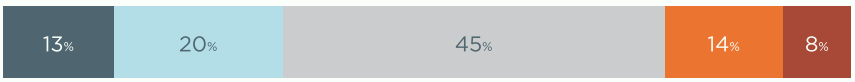
Statement 4 *Working Lands.* Large private working lands (e.g., ranches) are extremely valuable for the future of wildlife in our region and we need to ensure they remain viable. Overall consensus with 70% in agreement and 10% disagreeing.



Statement 5 *Outdoor Recreation Impacts.* The natural resources of our region are threatened by existing outdoor recreational use and will only get worse. General agreement with 63% in agreement and 16% not agreeing with the statement.



Statement 6 *Marketing Campaigns.* Existing marketing campaigns with regional chambers of commerce, tourism organizations, and economic development professionals are effectively promoting the region's outdoor recreation assets. Mixed response with 33% agreeing and 22% disagreeing.



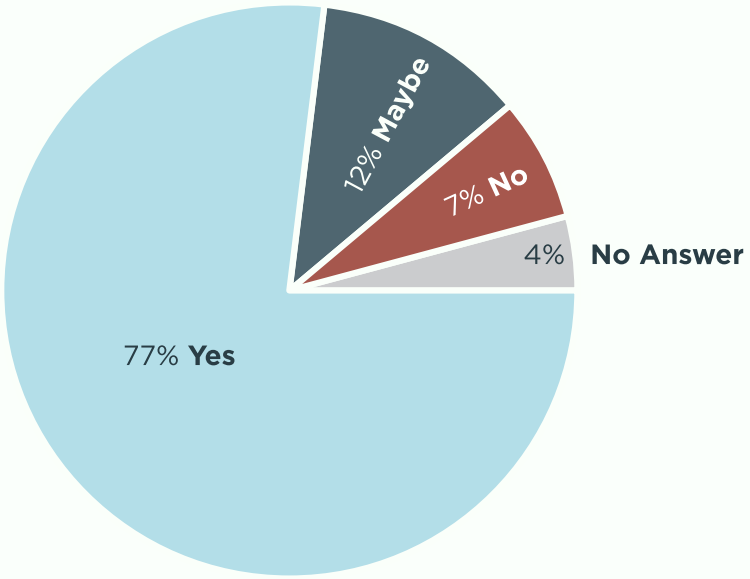
Statement 7 *Bed Tax.* We are making effective use of bed tax dollars for protecting natural resources. Overall disagreement with 54% disagreeing and only 5% in agreement.

Statement 8 *Best Practices.* Visitors and residents alike have a solid grasp on best practices for respecting wildlife and reducing their impact on natural resources. Overall disagreement with 73% in dissent and 13% in agreement.

13. Do you feel a personal responsibility to give back to the resource? If "yes", how do you give back? (select all that apply)

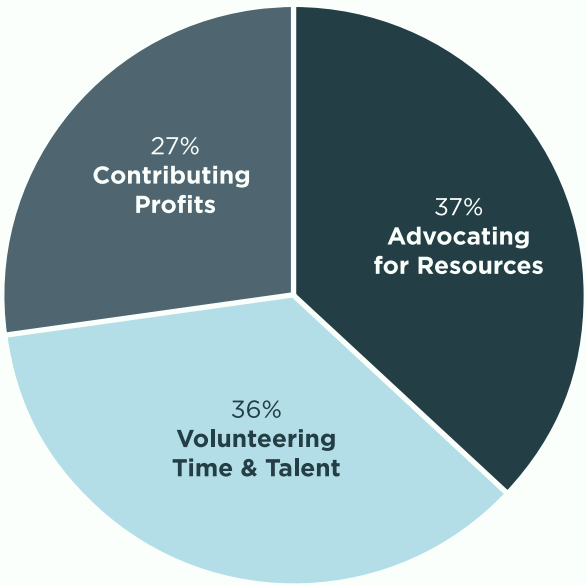
A majority (77%) of business owners/managers who responded to the survey avowed a personal responsibility to give back to the resource while 12% stated "maybe" and 7% said "no."

Question 13A Responsibility to Give Back



For those who answered "yes," respondents were generally supportive of volunteering time and talent, contributing a portion of profits, and advocating on behalf of the resource. The majority of respondents listed at least two of the three methods offered.

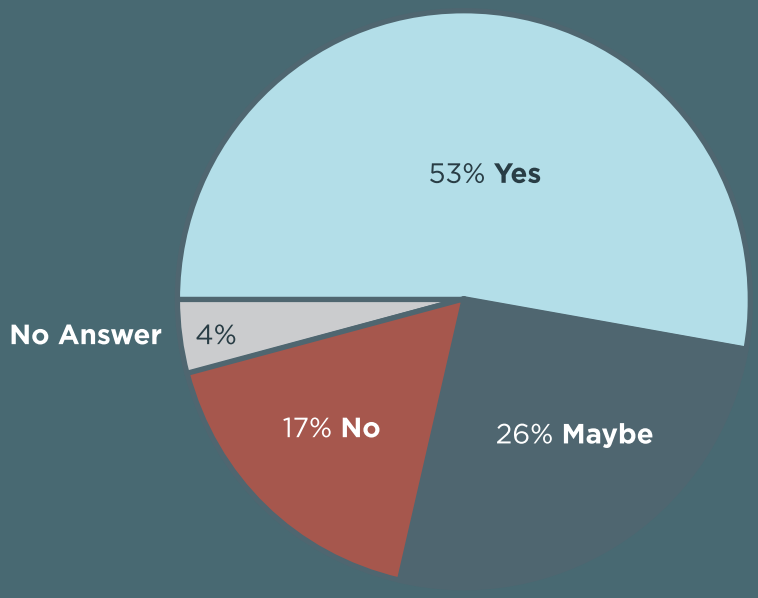
Question 13B How to Give Back



14. Would you support a local sales tax tied to our tourism industry if at least some of the proceeds went to the protection and enhancement of natural resources?

A bare majority of business interests (53%) expressed support for a sales tax. But there were 27 of 104 respondents (26%) who indicated "maybe," suggesting they might be open to a sales tax but need to learn more about the details of such a proposal.

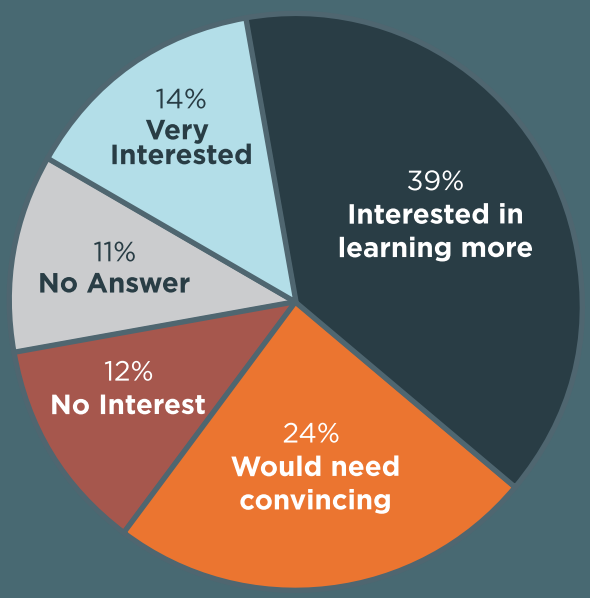
Question 14 Support for Sales Tax



15. Please rate your willingness to voluntarily contribute a portion of your profits to a fund restricted for the protection and enhancement of natural resources.

Most respondents supported the idea of contributing to a fund for natural resource protection: 14% were enthusiastic and 39% wanted to learn more. Sitting on the fence were 24% who "would need convincing" while 12% stated they were unwilling to contribute and 11% opted not to answer. A positive base of 53%, with 24% undecided, provides a solid base for further discussions.

Question 15 Voluntary Contribution



16. What is the one thing you would like to see done to help both your business and the region's natural resources?

This open-ended question elicited 122 submissions from 83 respondents, which ran the full gamut of issues from too much development and overcrowding to loss of community and too much politics managing wildlife. The general subject matter is summarized here, and the full set of responses is included as Exhibit C.

Question 16 Importance of Activities to Customer Experience

Activity	Freq.
Limit Development	25
Concern for fish and wildlife	23
Overcrowding	17
FWP management	12
Lack of regulation (Development)	7
Housing and labor	6
Water	6
Politics managing wildlife	6
Loss of community	5
Climate	3
Lack of respect for land	3
How to be involved	2
Wildfire	2
Insurance cost	2
Too many regulations (wildlife)	1
Lack of representation for tourism	1
Non-profit interference	1

17. As it relates to the region's natural resources and your business, what's the one thing that keeps you up at night?

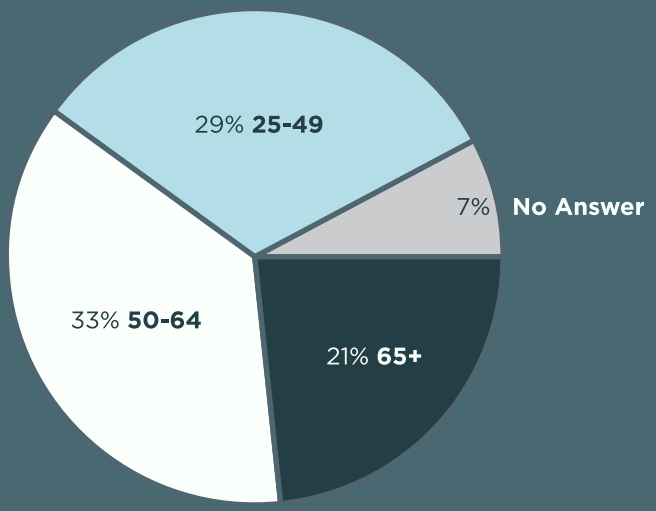
This last, open-ended question elicited responses from 88 respondents with several providing more than a single topic. A summary of themes presented two or more times is presented here, and the full set of responses is included as Exhibit D.

Question 17 What Keeps You Up At Night

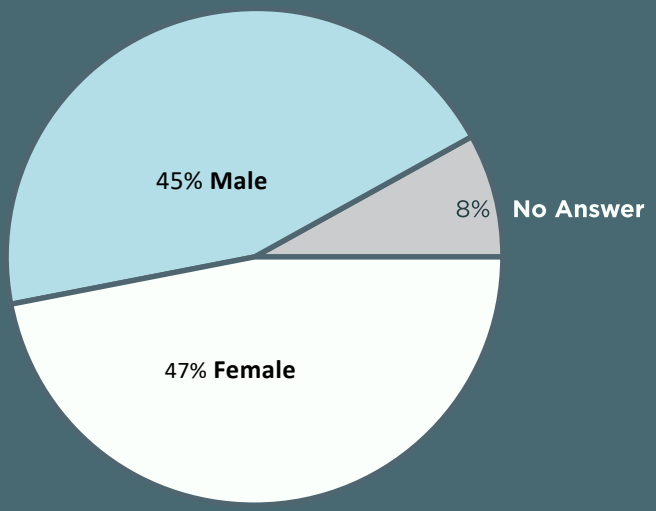
Topic	Freq.
Impacts from growth and development	18
Affordability (housing/cost of living); impacts on staffing	14
Overcrowding the resource/loving resource to death	11
Lack of trust in state wildlife management (politics, lack of science)	10
Loss of fish, wildlife, and their habitat	8
Loss of community/rural character)	7
Water resources	6
Hunting, trapping, and public safety (bison, wolves)	5
Misplaced need for profit and progress	4
Lack of respect for land/bad behavior	3
Need to give back to the resource/be good stewards	3
Climate change/wildfire	3
Lack of coordination and planning	2
Investments in infrastructure (roads & closures)	2
Grizzly bear management	2
Wildlife passage (roads)	2
Future insurance cost or availability	2

DEMOGRAPHICS OF RESPONDENTS

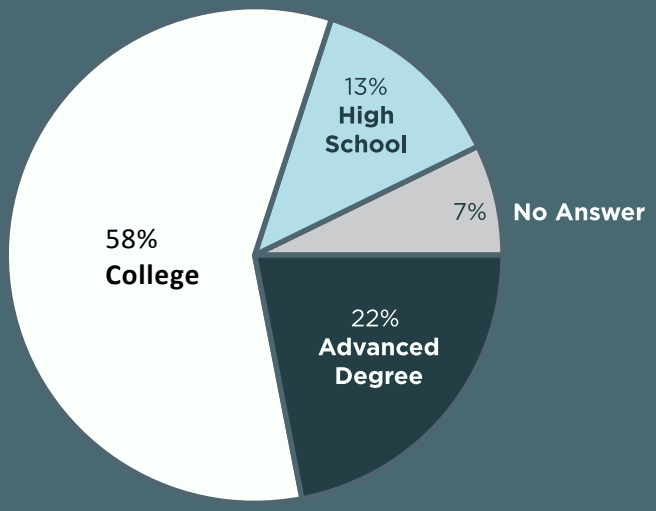
Age



Gender



Education



DISCUSSION AND SUMMARY

Capturing the views and opinions of 104 business owners, operators, and managers represents a significant but unknown percentage of businesses in the Livingston, Paradise Valley, Gardiner, and Cooke City/Silver Gate areas that derive at least 20% of their revenues from, or due to, outdoor recreation and tourism in the region.

Retail, outdoor outfitting, food services, and accommodations accounted for 67% of the businesses responding, mirroring state-wide findings where the majority of outdoor industry-supported jobs were in the retail trade; accommodation and food services; and arts, entertainment, and recreation. Many of the businesses reported two or more business activities, such as guiding and retail. Fifty percent of the businesses reported estimated revenues from tourism to be less than $100,000, and 70% at less than $250,000.

Asked to identify the types of recreational activities sought by customers and clients, wildlife viewing, hiking and walking, fishing, and camping were the top choices, followed by a full range of other outdoor pursuits. Queried about what wildlife species were the top draws, ungulates (e.g., bison, elk) and carnivores (e.g., wolves and bears) were #1 and #2. Other types of fish and wildlife were not ignored, but not the top attractions. Asked about the motivations of visitors and other customers, responding businesses ranked viewing wildlife as the top motivation (90% important), followed by educational experiences (81%), Yellowstone's thermal features (73%), spending time with family or friends (68%), and having an adventure (67%).

The respondent's demographics were diverse and representative, equally divided by gender (47% female, 45% male), age class (29%: 25-49; 33%: 50-64; 21%: 65 and older) and education. The majority of respondents indicated they attended college (58%), with 22% holding advanced degrees, and 13% high school or equivalent. Of note, the opinions and attitudes expressed in the survey were found to have little alliance with a respondent's age, education, or gender when selected minority opinions were cross-tabulated with respondents' demographics. In other words, it would be a mistake to make assumptions about an individual's view on community and natural resource management issues based solely on their demographics.

A major inflection point was found on the question of optimism. Three out of four respondents (75%) answered "yes" to the question, "Do you feel optimistic about the future of your business?" That optimism, however, did not extend to the future of natural resource management. When asked, "Do you feel optimistic about the future of natural resource management in your area?" 51 of the 104 respondents said "No," while another 28 indicated they were not sure—fully 75% expressed little or no optimism—a mirror opposite to the expression of optimism for their business future.

Concerning their business future, respondents expressed concerns about the availability and affordability of housing and its impact on finding and retaining the right staff. Concerns about the extent and type of development were commonly voiced, as were the associated issues of overcrowding and the attendant loss of community.

To gain a sense of the importance of specific natural resource-based issues, the survey asked a range of questions. Protecting scenic resources was a top concern, with 92% viewing them as

extremely important or of growing importance. Water and air resources were also rated high in importance (86% and 85% respectively). The ability to find solitude (79%) and "dark skies" (human light pollution, 71%) also ranked high in importance, while fisheries conservation and the quality of fishing were also commonly cited.

Examining reasons for the lack of optimism about the future of natural resources, the survey found recurring themes around human behavior and resource management impacts. For example, 86% of respondents ranked respect for the resource as extremely important or of growing concern, followed by concerns for overdevelopment (83%), the need for, and perceived lack of, science-based management (80%), respect for fellow recreationists (74%) and need for adequate law enforcement (74%).

While there were broad levels of support for conserving natural resources, responses became much more nuanced when addressing specific issues and proposals. For example:

Broad General Support

- Building a community brand for responsible outdoor recreation activities and products found strong accord (77%) as a way to help protect and enhance the region's wildlife and natural resources (8% disagreeing).

- Support for large private ranchlands remaining viable for their wildlife value found similar support with 70% in agreement (10% disagreement).

Mixed Support

- Asked whether existing marketing campaigns are effectively promoting the region's outdoor recreation assets, 33% agreed while 45% were neutral or registered no opinion, and 22% disagreed.

- Asked about "dissatisfaction with Montana wildlife management policies," response was mixed, with 46% rating it as a significant or growing issue, 31% a somewhat or neutral issue, and 23% finding no issue.

Lack of General Support

- A majority of respondents (73%) disagreed with the statement, "Visitors and residents alike have a solid grasp on best practices for respecting wildlife and reducing their impact on natural resources," with only 13% in agreement.

A majority (77%) of business owners/managers who responded to the survey avowed a personal responsibility to give back to the resource, while 12% stated "maybe" and 7% said "no." Those responding "yes" were equally supportive of advocating on behalf of the resource, volunteering time and talent, and/or contributing a portion of profits, with a majority listing at least two of the three methods offered. As to contributing a portion of proceeds to support natural resource management, 14% of business respondents were "very interested" while 12% were "not interested/not my responsibility." In the middle, however, were 63% who were on the fence: 39% indicating an "interest in learning more" and 24% that would need "some convincing."

The need to collaboratively raise new revenues (private or public) for wildlife found strong overall consensus with 74% in agreement (7% disagreeing). However, many respondents (54%) disagreed with the statement, "We are making effective use of bed tax dollars for protecting natural resources," with only 5% in agreement.

One specific proposal for raising new revenues is imposing a local sales tax tied to the tourism industry with a percentage of proceeds supporting the protection and enhancement of natural resources. As any discussion of a sales tax in Montana is commonly a third-rail issue, it is informative that 53% of business interests expressed support for a sales tax while 17% were opposed. Sitting in the middle were 26% who indicated "maybe," suggesting they might be open to a sales tax, but need to learn more about the details of such a proposal.

In summary, the survey finds a Park County tourism industry optimistic about their chances of success but deeply concerned with the long-term sustainability of the natural resources their businesses depend on. Two open-ended questions asked, "What is the one thing you would like to see done to help both your business and the region's natural resources?" and "As it relates to natural resources and your business, what is the one thing that keeps you up at night?" The 210 responses highlighted many issues and concerns, but recurrent themes were 1) growth and development, 2) affordability (housing, cost of living, loss of community), 3) loss of fish, wildlife, and habitat, 4) overcrowding, and 5) state management of wildlife (politics in wildlife).

Balanced against these challenges are the more than 77% of business interests who feel a deep personal responsibility to give back to the very resources that sustain them. While their collective ideas on how to do so vary (as they should), they share a commitment to their community and stewardship—a commitment to conservation and responsible use; the responsibility to manage lands and waters wisely in order to leave a rich legacy for future generations.

Wild Livelihoods and its partners aim to harness that passion, guiding businesses and their shared clientele toward the most impactful ways to protect the resources we all depend on.

Endnotes

1. Outdoor Recreation Roundtable, "New Data Shows Outdoor Recreation is a $1.2 Trillion Economic Engine," https://recreationroundtable.org/news/new-data-shows-outdoor-recreation-is-a-1-2-trillion-economic-engine-supporting-5-million-american-jobs/ Outdoor recreation consists of many activities including hunting, fishing, boating, biking, RVing, travel and related apparel and accessories.

2. Ibid.

3. Melissa Weddell, "The Montana Travel Industry-2024 Summary," Institute of Tourism and Recreation Research, University of Montana (2024). ITRR. 2025. The Montana Travel Industry-2024 Summary.

4. Larry Swanson, "Key Trends, Dependencies and Vulnerabilities in Park County, Montana and its area economy" (2016): 1-2. (Greater Yellowstone Wildlife-Related Activity Valuation Study, 2022)

5. For example, a majority of residents surveyed by ITRR in 2024 feel that the benefits of tourism outweigh the negative impacts, while also being in strong agreement that tourism promotion by the state provides an economic benefit to their community. At the same time, however, over 40% of respondents felt that the state was becoming overcrowded because of the number of tourists, while close to half felt that their community was dealing with issues of crowding during the summer season.
   Carter Bermingham et al, "Montana Residents' Attitudes Towards Tourism-2024, Institute for Tourism and Recreational Research", University of Montana, 5-2025.

6. Set of 26 business classifications based on U.S. Bureau of Economic Analysis (BEA) North American Industry Classification System (NAIC). See Exhibit B, Survey Question #4.

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Wild Livelihoods is a coalition of Montana businesses in the Greater Yellowstone whose livelihoods depend upon wild places. We share common interest in protecting open spaces, clean air and water, rich soil and native plants, and vibrant wildlife populations for all. We are guides, restaurants, lodges, gas stations, retailers, ranchers and more.

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