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MONTANA RESIDENTS:

MONTANA WORKFORCE STUDY - 2022

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MEGAN SCHULTZ, AND JOSH MARTIN

Quarterly Montana Resident Report / 1st Quarter: January - April 2022

ABOUT OUR WORK

Quarterly Montana Resident Study

This report is a summary of Montana residents and their participation within the workforce during the first quarter (Jan-March) of 2022. Since the beginning of the pandemic in March of 2020, the Institute for Tourism and Recreation Research (ITRR) has conducted a series of studies designed to understand the impact the pandemic has had on business owners, managers, and employees within the state, particularly in the world of tourism and outdoor recreation. Few states have been fortunate enough to recover their tourism industry as quickly as Montana. In a recent ITRR survey of more than 300 tourism-related businesses, respondents indicated their customer and sales volumes were up 18% and 21%, respectively, over 2019.

FOR ACCESS TO THE COMPLETE REPORT, VISIT OUR INTERACTIVE DASHBOARD AT:
<https://tableau.mus.edu/t/missoula/views/ResidentSurveyQ12022/TitlePage>

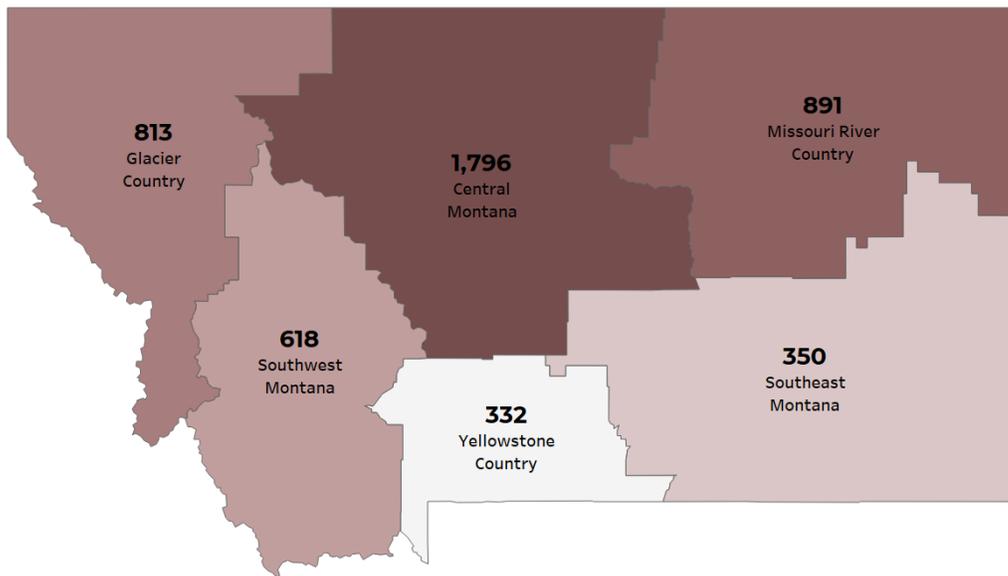
Though some job recovery has occurred, many businesses still report challenges with hiring employees and maintaining staff at sufficient levels to support pre-pandemic levels of operation; with all of this occurring with increased visitation and demand. This study was conducted to understand what part of the general resident population has worked in the service and hospitality industry since the beginning of 2020. Some topics include residents' current work status and whether or not they left their job since the start of the pandemic (and why). The report also includes demographic information as well as analysis conducted on the six different travel regions within the state (Glacier, Southwest, Central, Yellowstone, Southeast, and Missouri River).

METHODS

Data were collected by trained surveyors who asked questions to Montanans as they filled up their vehicle with fuel at gas stations or when they stopped at rest areas around the state. ITRR has permission from over 100 gas stations across Montana to talk to residents during the time it takes them to fill their tank. From January 2 to March 31st, 2022, any Montanan 18 years of age or older at these locations had an opportunity to be surveyed about their participation in the workforce since early 2020. The questions focused on employment within the service and hospitality industries and also asked those who left those sectors since spring 2020 their reason for leaving. All individuals were asked their current work status and if unemployed were given the chance to explain why. The respondent data were weighted by the county of residence and gender from the US Census, thus providing a representative sample reflecting the geographic population and gender make-up of the state.

DEMOGRAPHICS

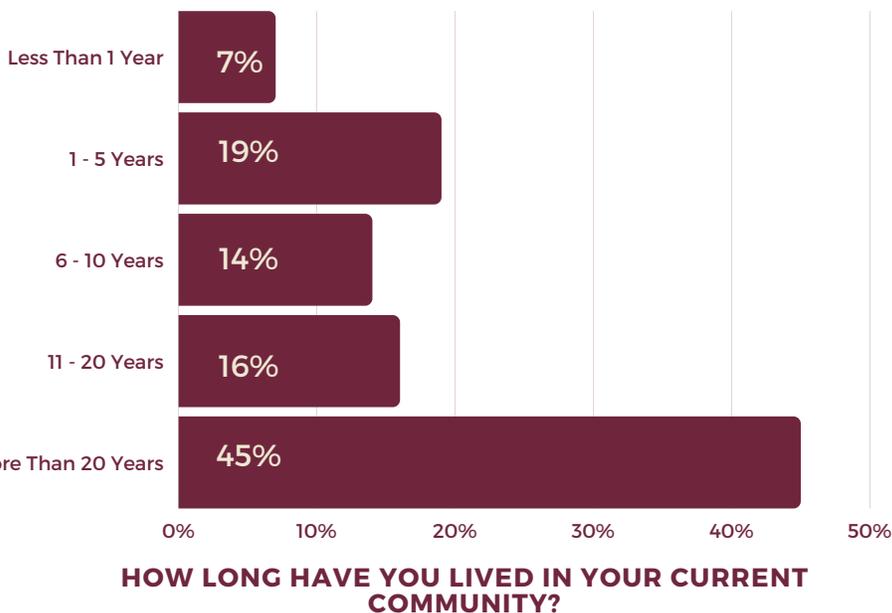
MONTANA TRAVEL REGIONS
(Number of Respondents)



MONTANA TRAVEL REGIONS

A total of 4,820 Montana residents were surveyed from January 2nd - March 31st, 2022 regarding several aspects of their current and past work status. Respondents from 55 different Montana counties participated in the survey. Cascade County and the Central Montana travel region represented the highest proportion of residents surveyed during Q1 of 2022. A map of the travel regions is presented above with the number of respondents from each region.

Residents living in communities of more than 20,000 people represented 38% of total respondents, followed by 24% who live outside of any community borders, and 21% who live in a community of less than 5,000 people. Additionally, 32% of respondents reported that they have children at home under the age of 18. Of those respondents that did have children at home, the average respondent had two children in their household.



48 YEARS

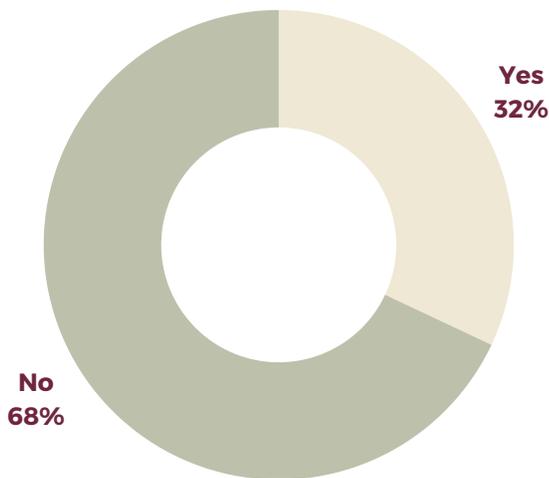
AVERAGE RESPONDENT AGE

The largest age cohort represented in the survey were respondents between the ages of 35 - 44 years old, accounting for 20% of all respondents. Those between 25 - 34 years old made up 18% of all respondents, followed by those 55 - 64 years old (18%). In addition, the gender split was nearly even after applying census weighting, with women representing 50% of respondents while men made up the other 50%. Only 5% of residents surveyed indicated they were currently students.

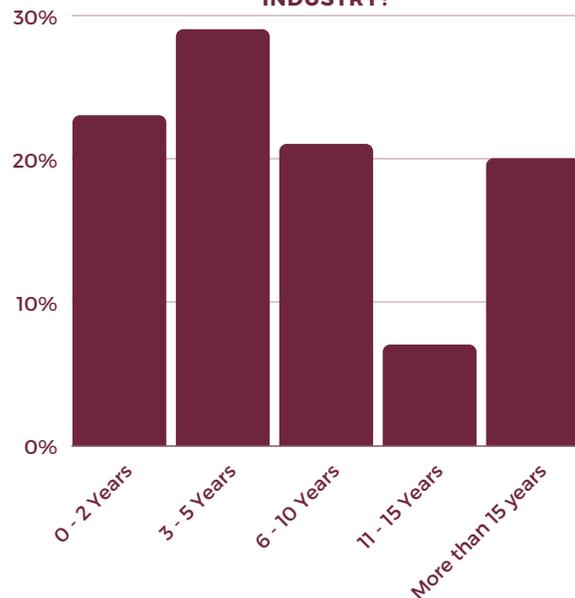
Service and Hospitality Employment

First, respondents were asked whether or not they had been employed in the service or hospitality industry at any point since the beginning of 2020. Just under one-third (32%) of respondents indicated that they had indeed worked in the industry since the beginning of 2020. Of those who had, 29% of respondents had worked in the industry for at least three to five years, followed by 22% who had two years or less of experience. Additionally, one in five respondents had worked in the industry for at least 15 years.

SINCE THE BEGINNING OF 2020, HAVE YOU WORKED IN THE SERVICE AND HOSPITALITY INDUSTRY?



HOW LONG HAVE YOU WORKED/DID YOU WORK IN THE SERVICE OR HOSPITALITY INDUSTRY?



83%

Of those who worked in the service or hospitality industry, 83% are still working in the industry.

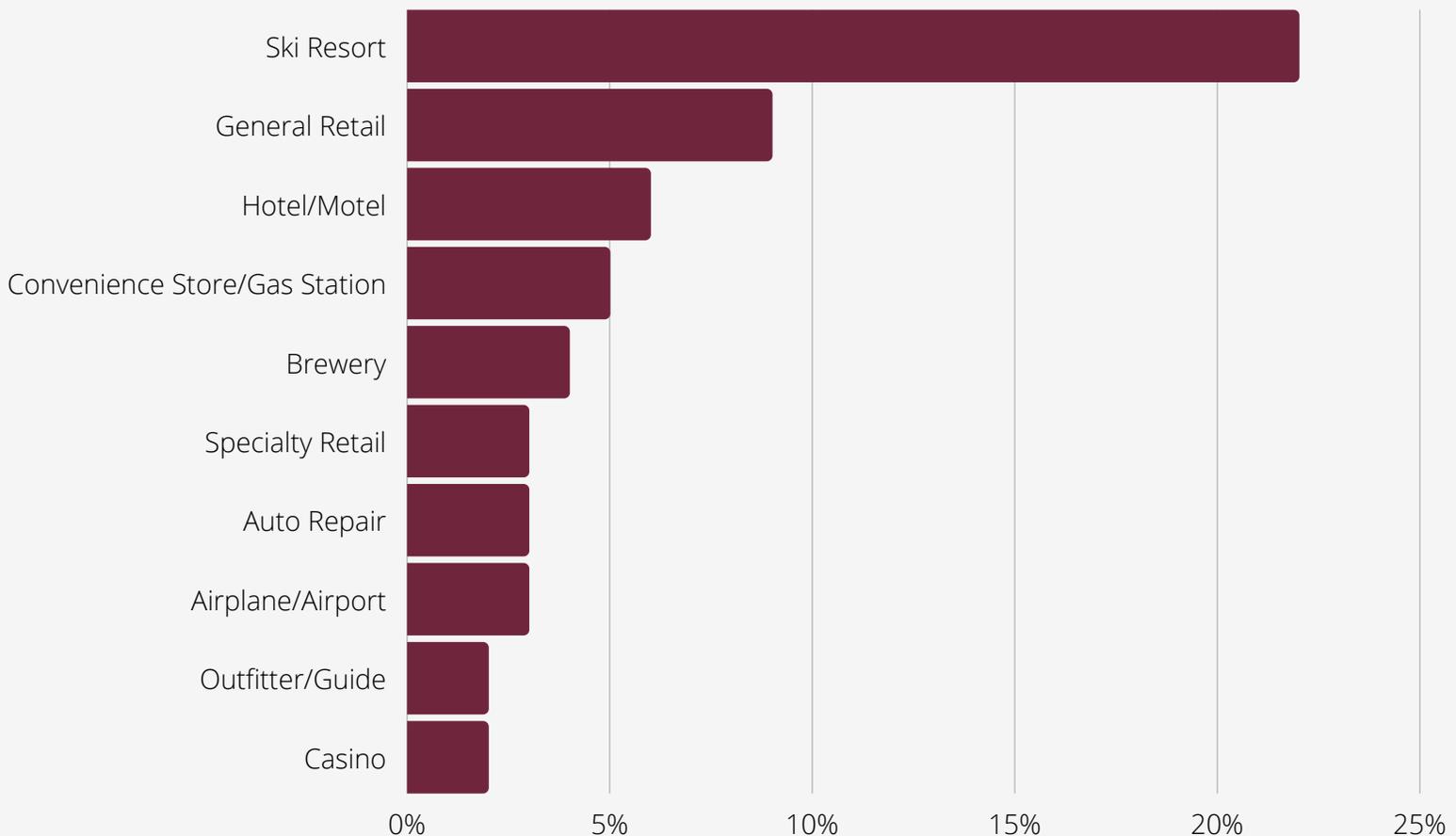
Several key findings from different analysis segments are presented below:

- Women were more likely to report employment in the service/hospitality industry than men (40% vs. 24%, respectively).
- Central Montana was the travel region that reported the highest percentage of respondents who had worked in the service/hospitality industry since the beginning of 2020 (40%).
- Respondents who were new to their community (e.g., lived there for less than 1 year) were more likely to have worked in the service/hospitality than others who had been in their community longer.
- Communities with populations of 5,001 to 10,000 people had the highest proportion of respondents who participated in the service/hospitality industry (45%).

PART OF SERVICE INDUSTRY

Although the initial effects of the pandemic were felt abruptly across the entire country, some states have been able to recover their tourism industry more quickly than others - Montana being one of those states. Of those respondents who reported they had worked in the industry, the highest proportion stated they are or had worked for Ski Resorts (22%), followed by those in General Retail (9%), and Hotels/Motels (6%). The figure below provides the Top 10 selections from respondents regarding which section of the industry in which they work or worked. It is important to note that respondents were able to check all options that applied to them, therefore, percentages below will not equal 100%. For a more comprehensive list, visit our interactive dashboard using the link on page 1 (About Our Work).

WHICH PART OF THE SERVICE AND HOSPITALITY INDUSTRY HAVE YOU WORKED IN OR DO YOU WORK IN? (CHECK ALL THAT APPLY.)



PARTING WAYS SINCE THE PANDEMIC

Of those respondents with some work experience in the service/hospitality industry, nearly half (47%) reported that they left their job at some point since the beginning of 2020. It should be noted that respondents may have returned to their same employer or a new employer within the same industry (e.g., return after furlough) and that the previously mentioned 47% are not completely gone from the industry.

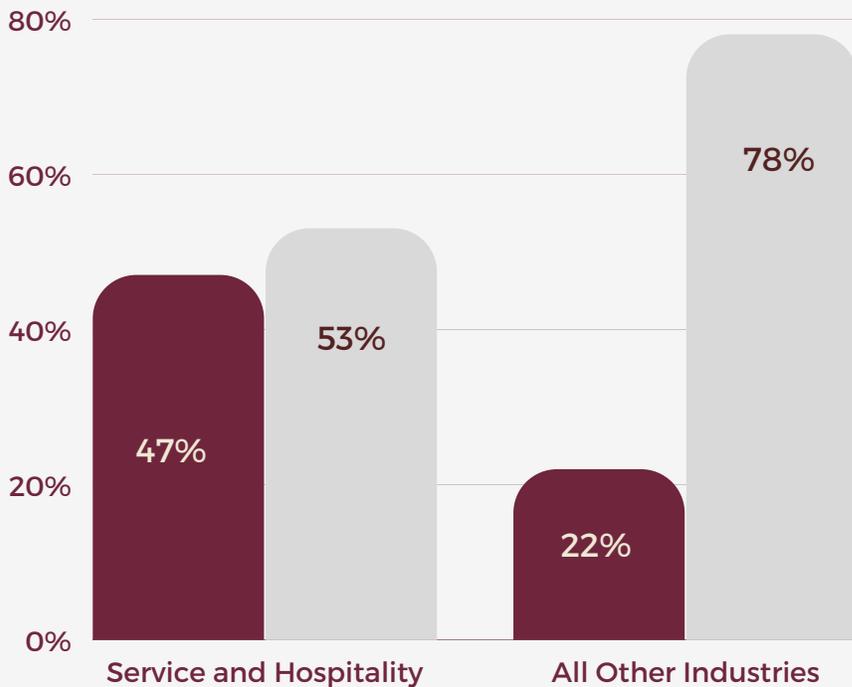
22%

Percentage of respondents who left a job at any point since the start of the pandemic.

When comparing respondents who had worked in the service/hospitality industry to those who had not, respondents from outside the industry were much less likely to have left their job at any point since the beginning of the pandemic. For those with no work experience in the service/hospitality industry, only 22% reported they left a job at any point since the beginning of 2022 - 25% less than those who worked in the industry.

DID YOU LEAVE A JOB AT ANY POINT SINCE THE START OF THE PANDEMIC?

■ YES ■ NO



- Women were more likely to report leaving their job in the service/hospitality industry than men (54% vs. 35%, respectively).
- Glacier Country was the travel region that reported the highest percentage of respondents who left their job in the service/hospitality industry since the beginning of 2020 (53%).
- Respondents who had worked in the service/hospitality industry for more than 10 years were less likely to leave their job in the industry compared to those with less than 10 years of experience.

REASONS FOR LEAVING JOB

For those residents who stated they worked in the service/hospitality industry and left their job at some point since the beginning of 2020, they were asked to select which of the reasons provided to them best represented their situation. A majority of respondents (60%) indicated that they actively chose to leave their job, followed by 29% who were furloughed and 11% who were let go.

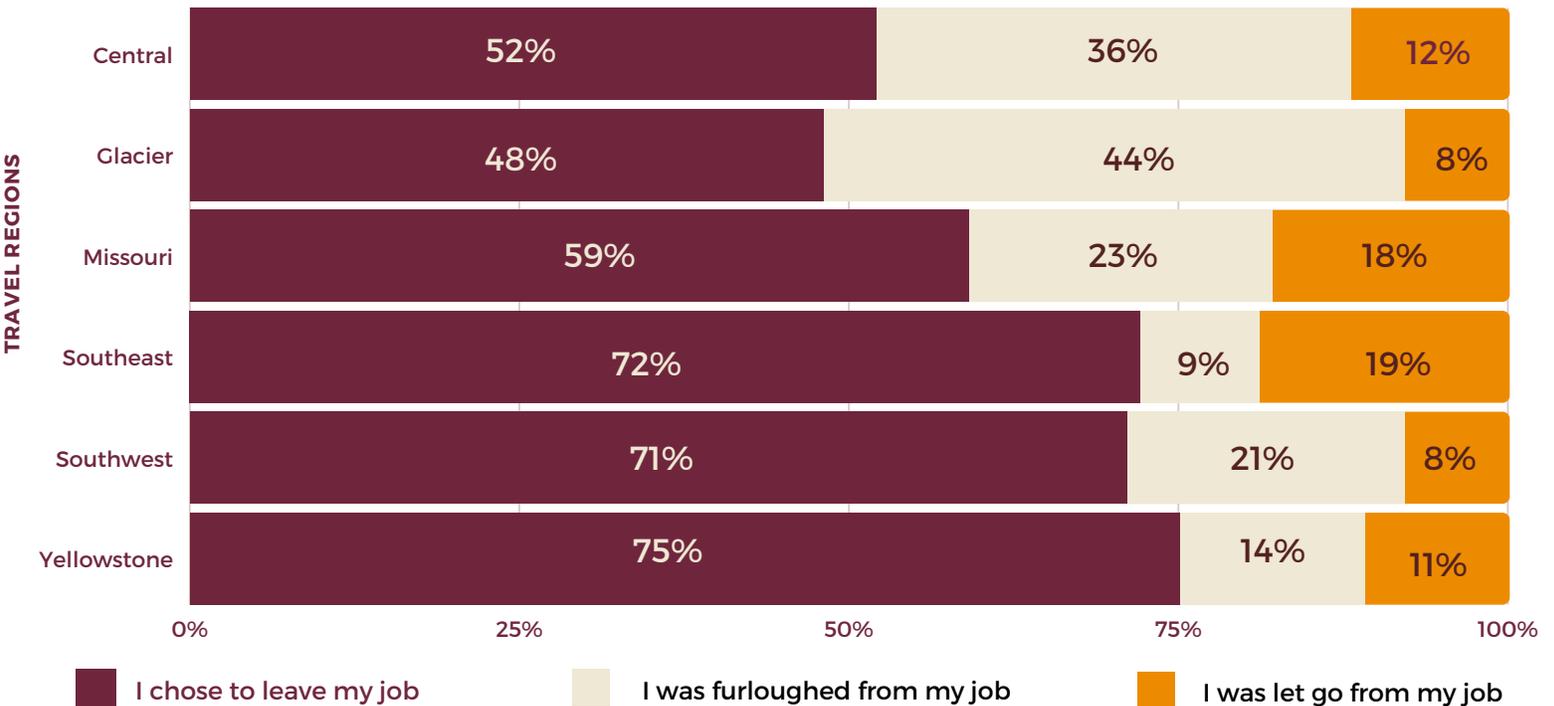
60%

Chose to leave their job since 2020

29%

Those who were furloughed from their job since 2020

SELECT WHICH STATEMENT BEST REPRESENTS YOUR SITUATION (REASONS FOR LEAVING JOB)



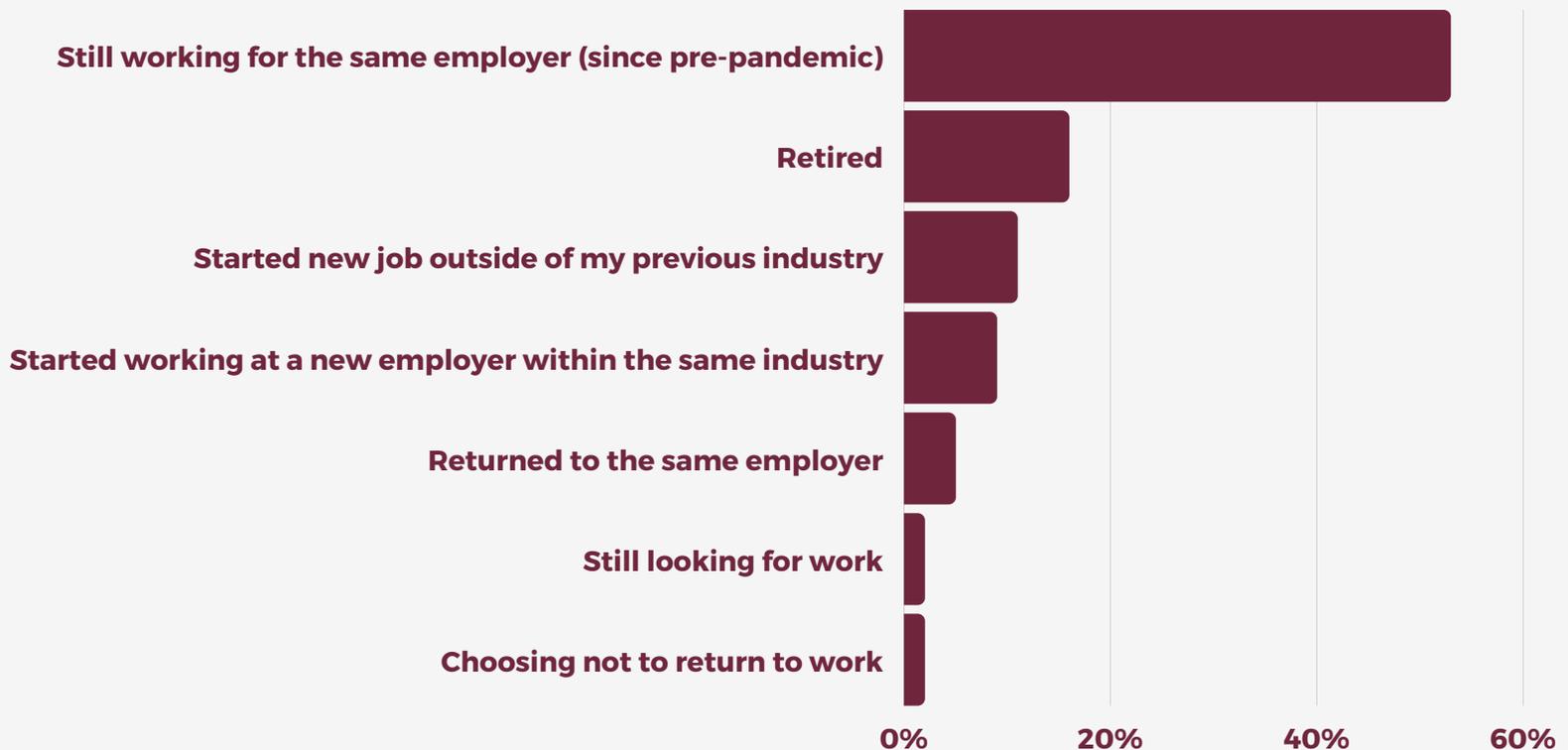
When analyzing results by travel region, a majority of respondents from each region, except Glacier Country, reported they made the decision to leave their job on their own. In travel regions like Southeast MT (72%), Southwest MT (71%), and Yellowstone Country (75%), nearly three out of four respondents from each region who reported leaving their job stated they made the choice to leave. Overall, men were more likely to report leaving their job compared to women (70% vs. 52%, respectively), while men were less likely to be furloughed than women (19% vs. 37%, respectively.)

REASONS FOR UNEMPLOYMENT

Respondents were then asked to select which of the statements provided to them best described their current work situation. Overall, 53% of respondents reported that they are still working for the same employer since the beginning of 2020, followed by 16% who were retired, and 11% who had started a new job outside of their previous industry. When analyzing the results by travel region, respondents in Missouri River Country were more likely to report working for their same employer (62%), while those in Glacier Country were slightly more likely to be retired (19%).

When analyzing results by the size of the respondent's community, respondents in communities with roughly 10,000 to 20,000 people were less likely to report working for their same employer (45%) while also being more likely to start a new job outside of their previous industry (20%). Overall, just 9% of respondents reported that their primary job was seasonal, with areas like Yellowstone Country (14%) and Glacier Country (10%) reporting slightly higher percentages of respondents who relied on seasonal work.

WHICH OF THE FOLLOWING STATEMENTS BEST REPRESENTS YOUR CURRENT WORK SITUATION?



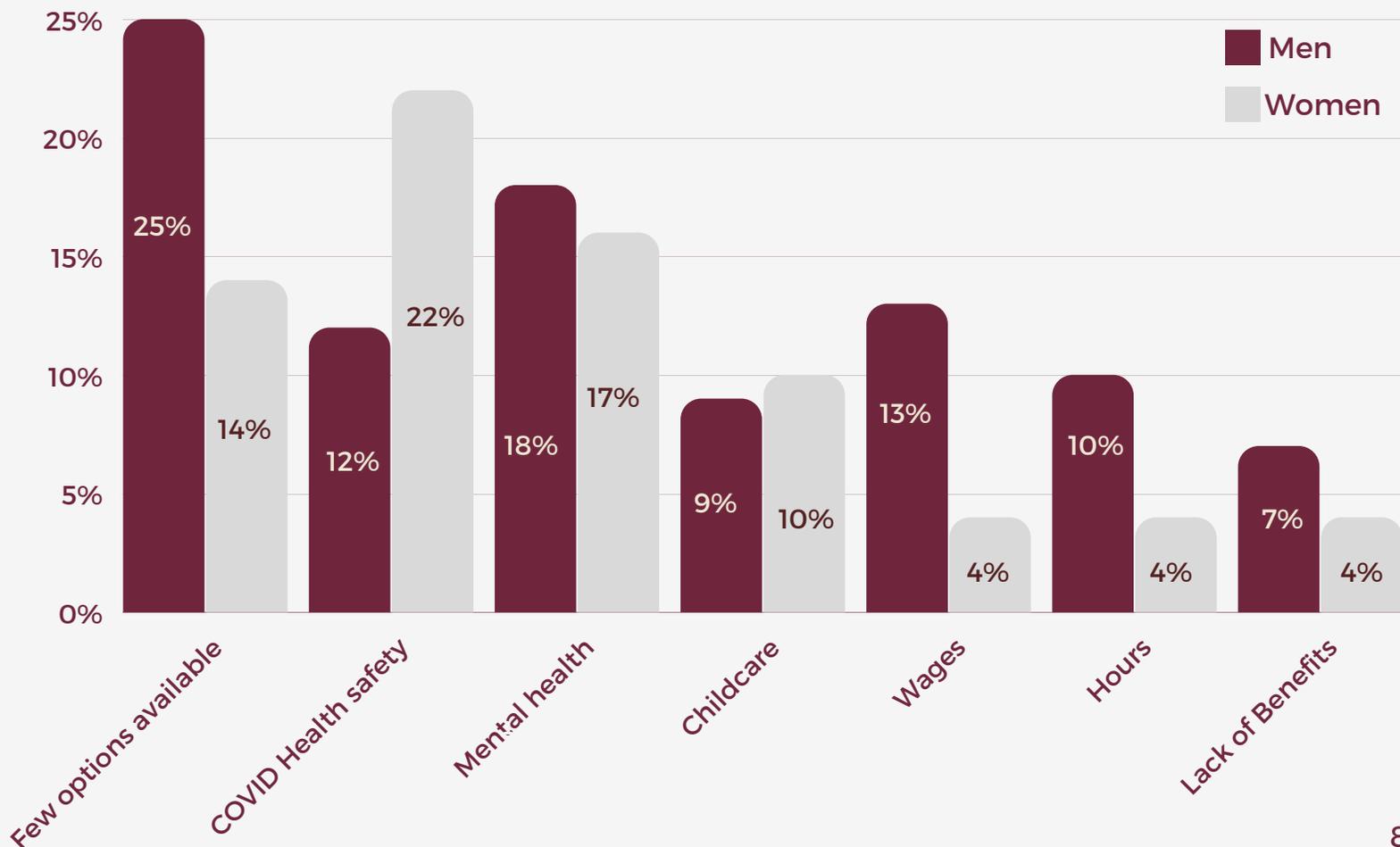
PARTING WAYS SINCE THE PANDEMIC: RETURN TO THE WORKFORCE

Finally, those respondents who stated they choose not to return to work or that they were still looking for work were asked some of the reasons they've not yet returned to the workforce. Overall, 18% of respondents indicated there were too few options available for the type of work they were looking for.

Additionally, another 18% of respondents stated that COVID health safety in the workplace was a reason they haven't returned.

When comparing men and women, men were more likely to indicate there were too few options for them (25% vs. 14%, respectively), while wages seemed to be more relevant to male participants (13% vs. 4%). Conversely, women were more likely to cite COVID health safety in the workplace (22% vs. 12%) and slightly more likely to cite childcare (e.g., access to, quality of, cost). It should be noted that "Other" was the most popular reason selected, and was excluded from this analysis.

WHAT ARE SOME OF THE REASONS YOU HAVE NOT RETURNED TO THE WORKFORCE?



CONCLUSIONS

Quarterly Montana Resident Study

Results from this survey indicate that the service and hospitality industry of Montana experienced greater turnover within their ranks when compared to other industries. Of residents that were surveyed, nearly a third (32%) had worked in the service or hospitality industry since the beginning of 2020, with 83% of those still participating in the industry. Additionally, roughly 20% of those respondents had at least 15 years of experience in their respective field.

However, of those respondents who had worked in the service or hospitality industry since the beginning of 2020, nearly half (47%) stated that they left a job at some point in the past two years - 25% higher when compared to an aggregate of other industries. Although this comparison is stark, it's unsurprising to find that a sector of the economy such as service and hospitality, that requires either direct interaction with a customer or heightened exposure within the workplace to conduct one's work, would harbor such levels of turnover in a time where tight labor markets currently favor employees.

When asked what best represented their reason for leaving their job, 60% of respondents stated they chose to leave their job. Just 11% of respondents who left their job during the pandemic stated they were let go from their job. Although the pandemic has caused massive upheaval in the way we work, travel, and communicate, it also appears to have presented several residents with the opportunity to make a change in their life.

For the small percentage of respondents who either chose not to return to work or were still looking for work, 18% indicated there were too few options available for their type of work, while another 18% stated COVID health safety in the workplace. As we enter the third summer of COVID-19, its effects continue to linger throughout the labor market. ITRR has conducted several surveys on the effects of COVID-19 in relation to business owners, managers and employees dating back to the beginning of the pandemic. For more information on the topic, visit our Publications page on our website and enter the search term "Covid."