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Institute for Tourism and Recreation Research

10-4-2023

ITRR Presentation to Tourism Advisory Council, October 2023

Melissa Weddell

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Institute for Tourism & Recreation Research

Tourism Advisory Council Meeting

October 3 & 4, 2023

Agenda

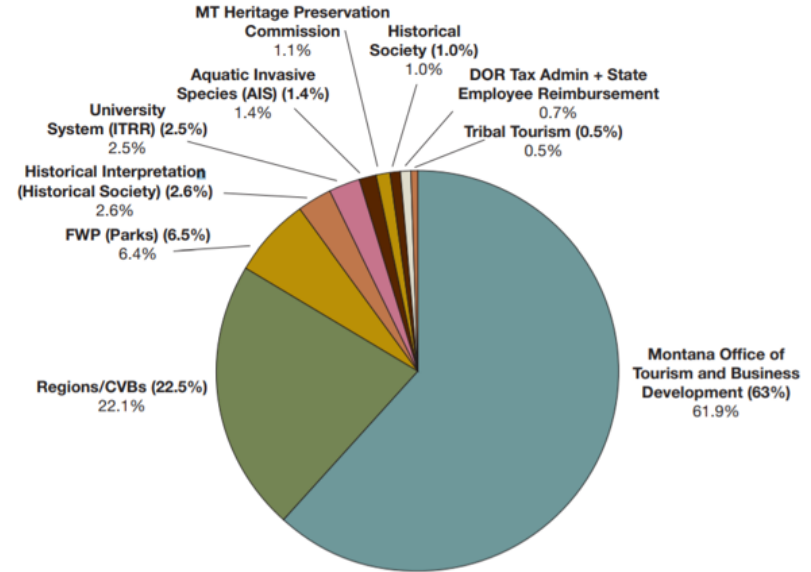
- Welcome & Introductions
- Data Collection Methods
- FY 24 Projects
- Research Impacts
- ITRR Accomplishments
- FY 25 Proposed Project Ideas/Research



Who we are

- ITRR was established in 1987 to conduct objective research in tourism and recreation. ITRR is housed in the W.A. Franke College of Forestry and Conservation at The University of Montana-Missoula.
- ITRR receives 2.5% of the 4% of Lodging Facility Use Tax. Research needs are solicited annually from tourism businesses, government agencies, non-profits, and other interested parties, then prioritized and approved by the Tourism Advisory Council. The Dean of the W.A. Franke College of Forestry and Conservation has final approval of selected projects.
- Additional grants and contracts are obtained through written proposals to public and nonprofit agencies involved in tourism and recreation. In 2020, ITRR was awarded a \$40 million 5- yr. contract with two other research firms.

DISTRIBUTION OF 4% LODGING FACILITY USE TAX*



Institute for Tourism and Recreation Research



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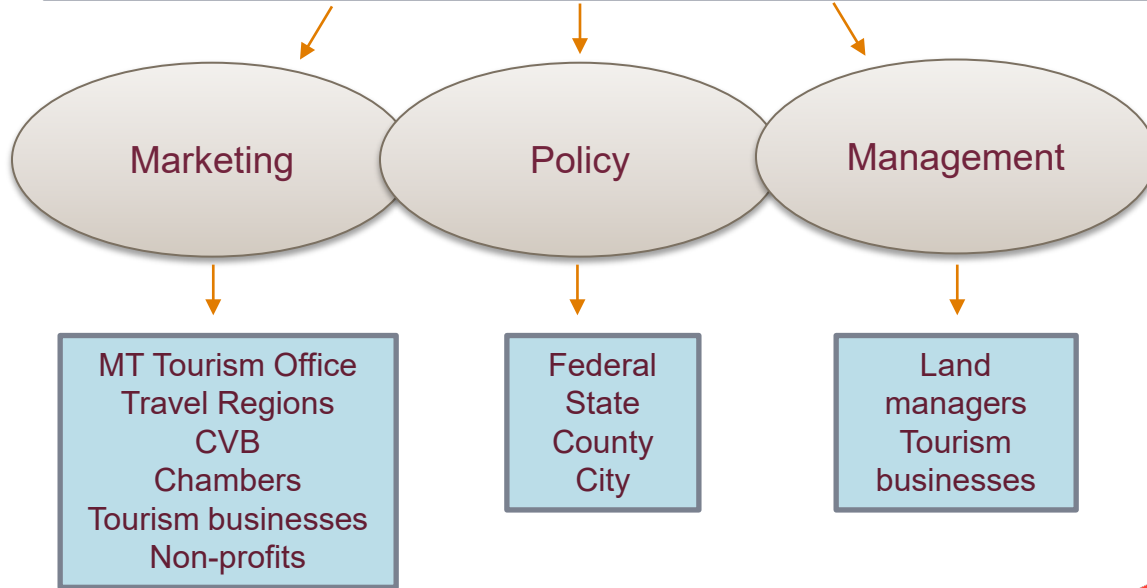
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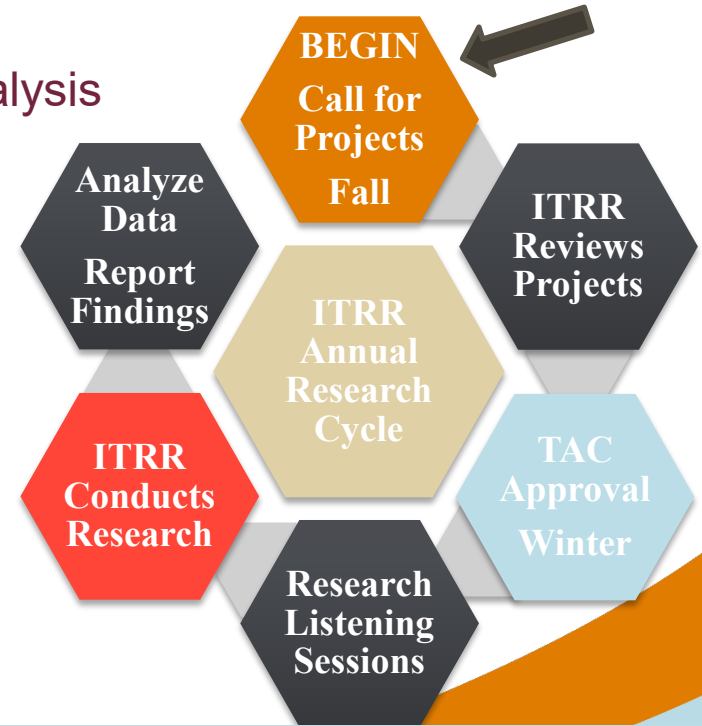


Institute for Tourism & Recreation Research (ITRR):
Collect, analyze, and interpret tourism and
recreation data for planning and decision making



Institute for Tourism and Recreation Research

- Quarterly Nonresident Travel & Recreation Analysis
- Quarterly Resident Survey
- Economic Impacts and Future Outlooks
- Tourism and Recreation Monitoring
- Emerging Issues
- Survey Kits
- Data Visualization
- Public Repository of Research



36 Years of Providing Travel, Tourism, and Recreation Research

Tourism Advisory Council



- The Governor-appointed Tourism Advisory Council (TAC) oversees the distribution of the Lodging Facility Use Tax ("bed tax") to Montana's tourism regions and convention and visitor bureaus, advises the Department of Commerce relative to tourism promotion, and fulfills other functions as defined by MCA 2-15-1816.
- Each year, ITRR proposes a research agenda, including project proposals and a budget outline, to the TAC Research Committee.
- Projects are discussed based on how beneficial they will be to the tourism and recreation industry statewide. More niche, or local projects, may be approved if the findings would be beneficial or applicable to others.
- TAC votes on bed tax-funded projects annually

ITRR Research Projects

FY 24 TAC Approved Projects

Yellowstone Flood Recovery & Resiliency

Tourists' Preferences for Stargazing in Eastern MT

Impacts of Short-term Rentals in Montana

Montana Agritourism & Recreation: 20 Years Later

Recreation Access Research (Cooke City/Silver Gate)

Understanding Eastern Montana Visitor

On-going Annual Research

Quarterly Nonresident Analysis

Quarterly Resident Analysis

Annual Economic Impacts and Outlook

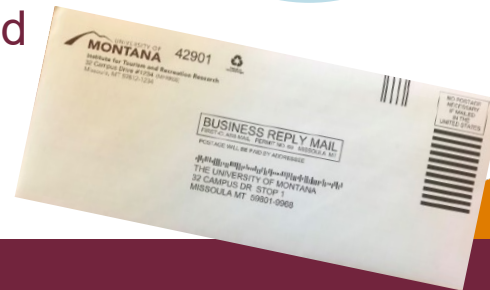
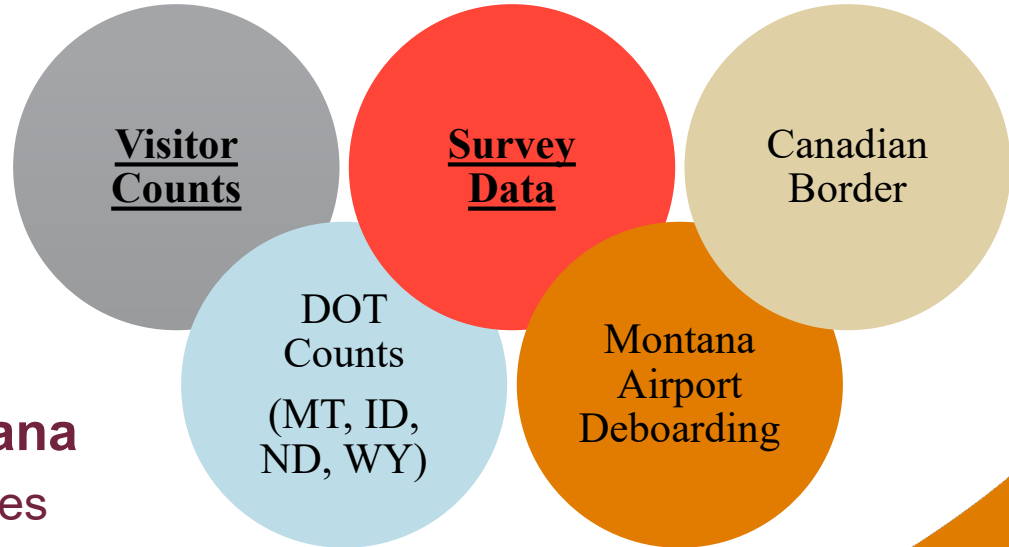
Tourism and Recreation Monitoring

State Park Visitation

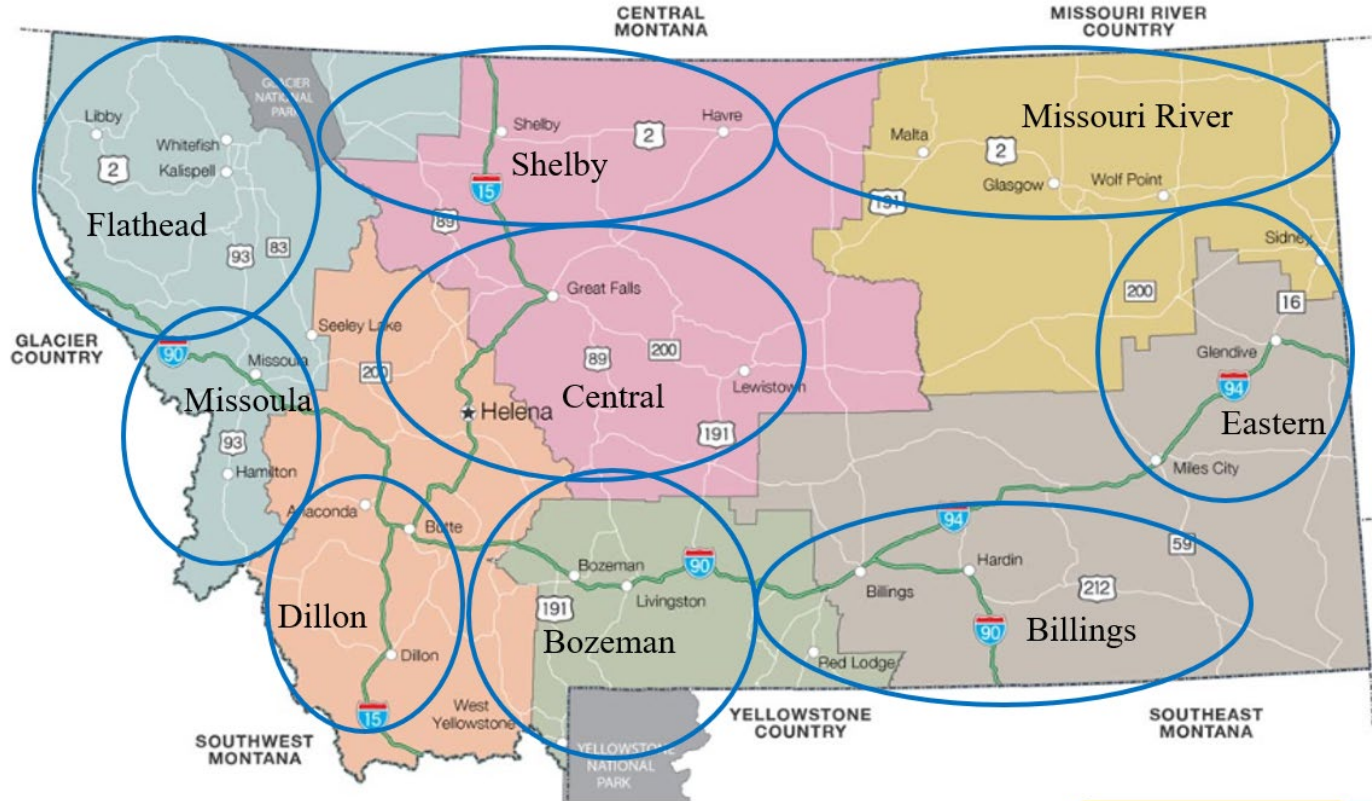
Survey Kits

Quarterly Nonresident Research

- **On-going since July 2009**
- **Each Intercept:**
 - Up-front survey on the iPad
 - Mailback survey
- **Understanding the Total Population of Visitors to Montana**
 - 11 Surveyors covering 9 Territories
 - Over 65 Communities Represented
 - Each working 29 hours per week*



Data Collection Territories



INSTITUTE FOR TOURISM & RECREATION RESEARCH

Home

Survey Kit

About ITRR

Employment Opportunities

Interactive Data

Contact Us

Publications and Reports

INSTITUTE FOR TOURISM & RECREATION RESEARCH

The Institute for Tourism & Recreation Research conducts travel and recreation research in Montana, with a primary focus on the nonresident travel survey conducted throughout the state. ITRR is perhaps best known for producing the widely used statewide estimates of total nonresident visitation and travel expenditures, as well as visitor characteristics, in the state each year, along with the annual estimate of the economic contribution of nonresident travel to Montana's economy. Read more about the [nonresident travel survey and visitation and spending estimation models](#).



INTERACTIVE DATA

SPENDING & ECONOMICS

PUBLICATIONS

MOST RECENT FINDINGS

SURVEY KIT

<https://www.umt.edu/tourism-recreation-research/>

Survey Kit Overview

- Service for a minimal fee
 - \$500 to \$800
 - Depends on method used
- Includes:
 - Survey design (based off template)
 - Guidance on collecting the data
 - Data entry and analysis
 - Report on the results
 - Including open-ended comments in an appendix
- Survey Kits (2023 Examples)
 - Montana Folk Festival
 - Livingston Yellowstone HarvestFest
 - The Event at Rebecca Farm
 - Gardiner Rodeo



ITRR Data Dashboards (Publicly Available)



[Nonresident Survey Full Data Summary](#)

Dive in to complete customizable access to summary percentages from our complete nonresident survey.



[Nonresident Survey Mailback Crosstabs](#)

Examine how trip characteristics like Activities or Sites Visited on trip vary across cross-sections of nonresident visitors.



[Visitor Trends Nonresident Visitation](#)

Learn how many nonresidents visit Montana by examining visitation trends.



[Resident Survey National Park Visitation Q1, 2023](#)

Our most recent resident report from Q1, 2023 highlights Montana residents' visitation to Yellowstone and Glacier National Parks.

NEW-Destination Insight Platform (Authorized Users)

ITRR

Destination Insights Platform

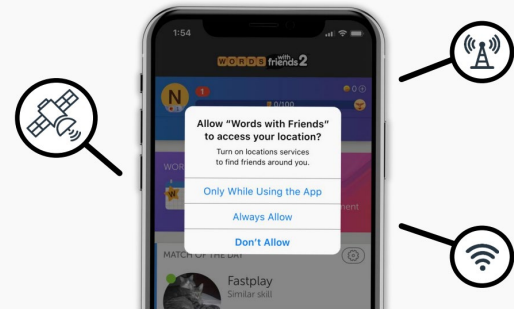
Welcome to University of Montana's Destinations Insights dashboard, providing an easy-to-use business intelligence solution for your destination's visitation data.

HELPFUL RESOURCES

- SELF-PACED TRAINING**
Learn at your own pace, from the comfort of your office, home, or wherever!
- POWERPOINT PLUG-IN**
Present the Domo information with PowerPoint plug-in.
- WORD PLUG-IN**
Add your Domo information quickly and easily with the Domo Word plug-in.
- EXCEL PLUG-IN**
Get Domo data sources straight to your custom Excel spreadsheet with the Domo Excel plug-in.

Mobile Location Data

- Growing Trends in Tourism Industry
- Should not be compared to visitation data (apples vs oranges)
- Provides information about geographic positions of devices (such as smartphones or tablets) or structures (such as buildings and attractions) and does not collect a person's identity, demographics, or other identifiable information
- Rural location challenges with cell service and sample size
- Many factors impact the total sample size
 - Number of app partnerships
 - Usage of apps
 - App developer policies
 - Volume of visitors



ITRR Research Impacts

- **ScholarWorks**
 - ~15,000 Annual Downloads
 - Over 96k Downloads since 2014
- **Interactive Data Reports**
 - ~2k views each quarter
- **In 2022 ITRR**
 - Surveyed 7,496 nonresidents
 - Surveyed 11,537 residents

Data Usage by Type



2022 Montana Travel Industry

2022 Estimates

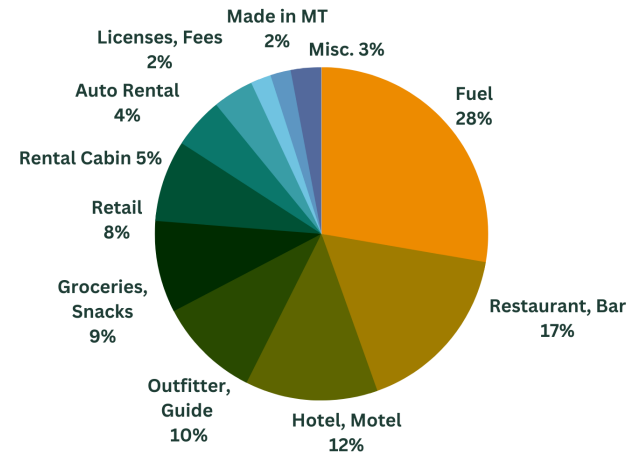


12.5 million travelers

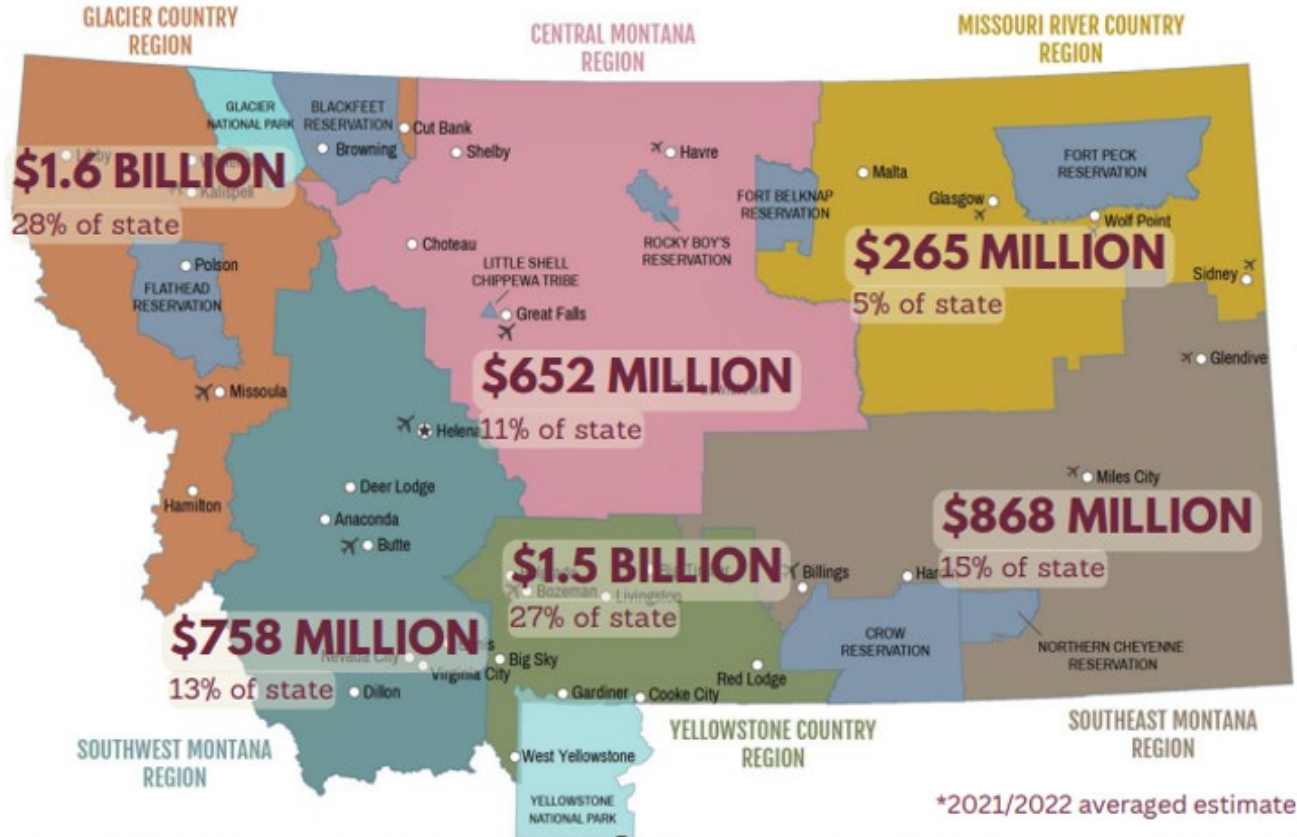
Year	Nonresident Visitors
2022	12,409,000
2021	12,840,000
2020	11,202,000
2019	12,585,000
2018	12,343,000



Nonresident travel spending in Montana -
\$5.82 billion

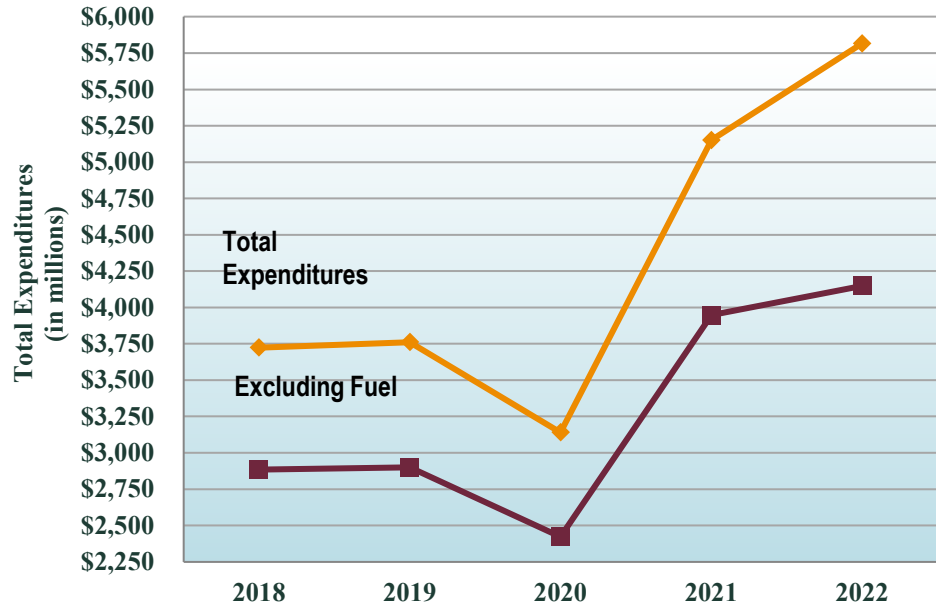


2022 Montana Travel Industry

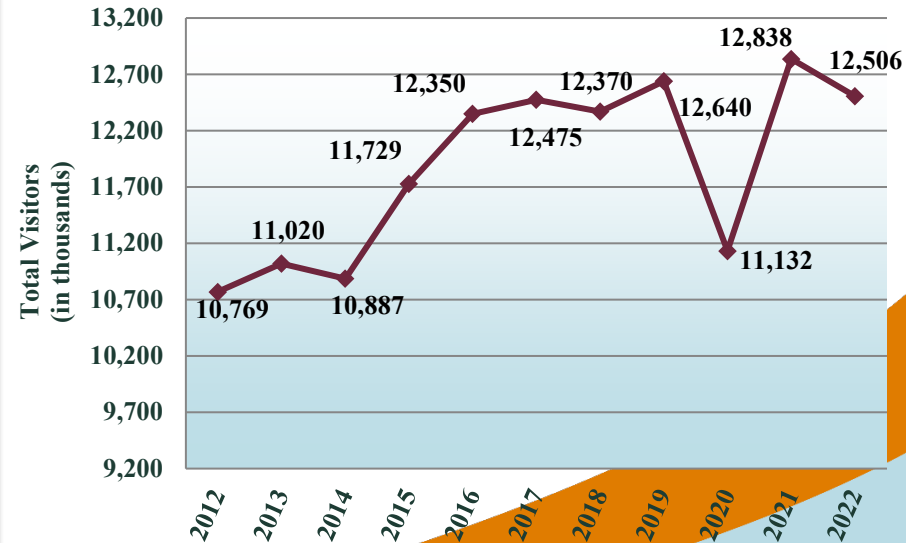


2018-2022 Montana Nonresident Traveler Expenditure and Visitation Trends

Total Actual Expenditures

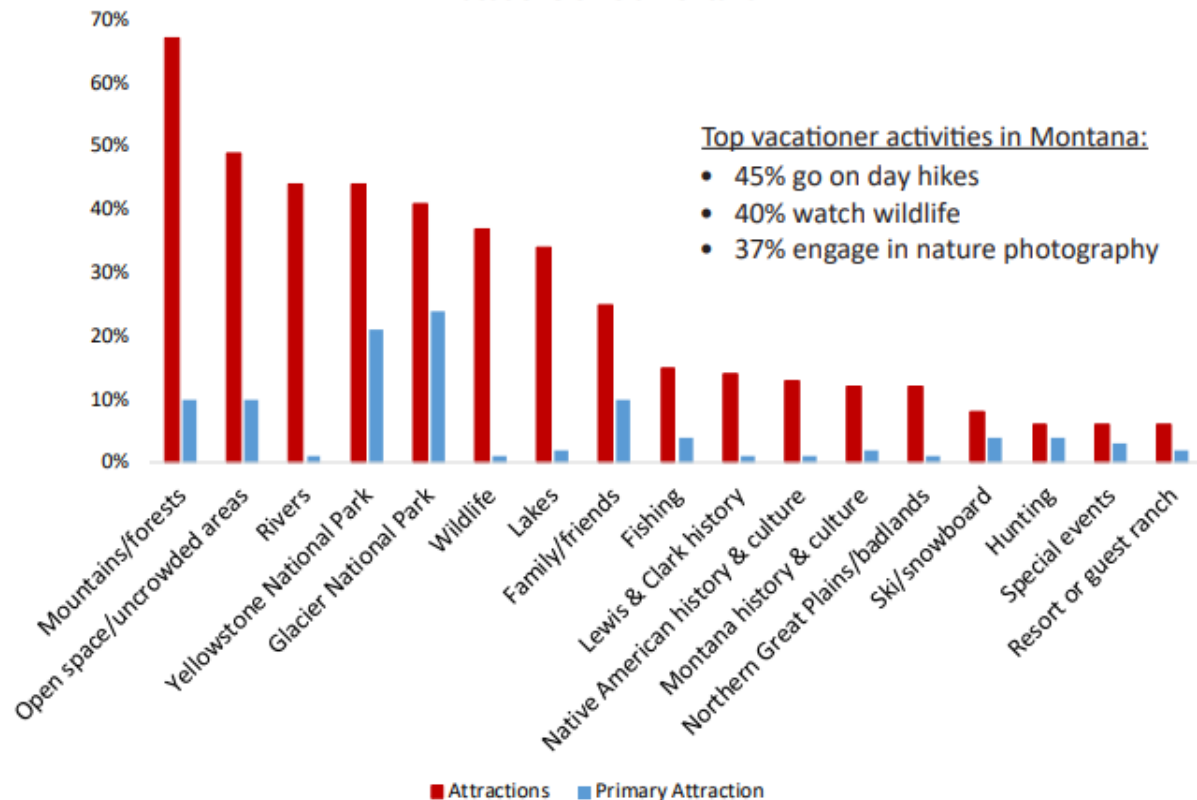


Nonresident Visitors



Vacationers Come to Montana for the Great Outdoors

Natural resources are the top eight out of nine reasons vacationers visit Montana.



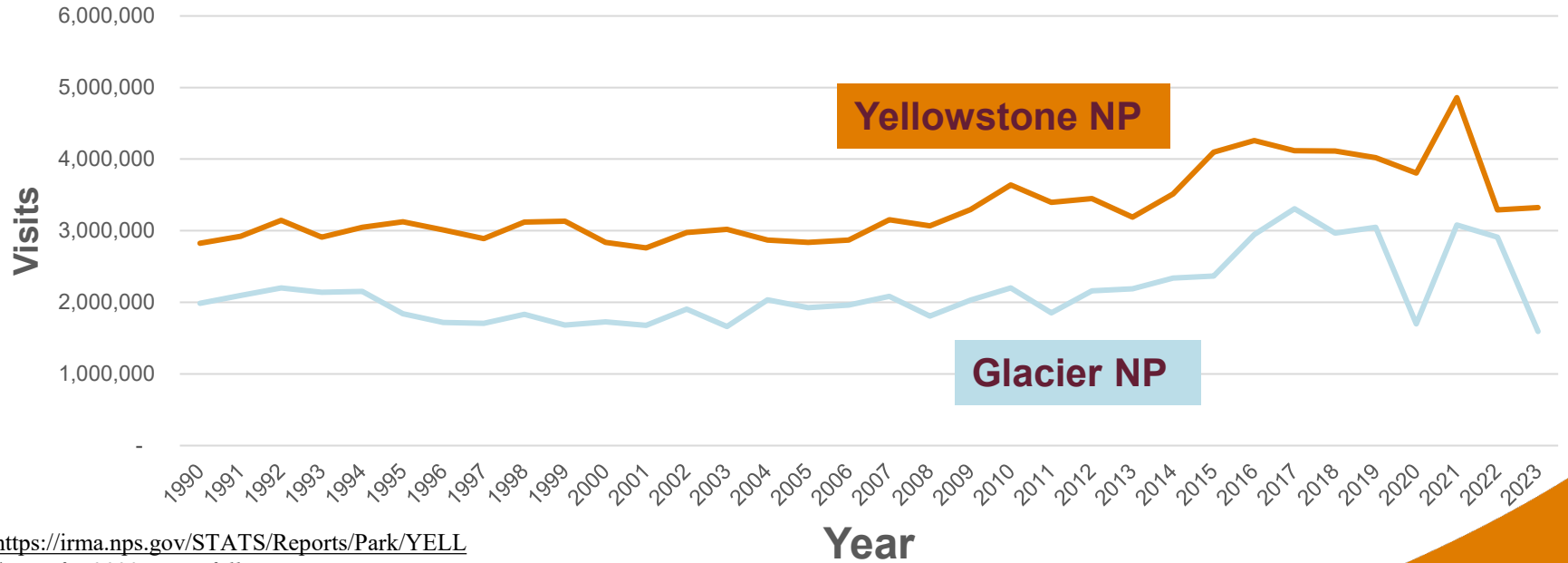
2022-23 ITRR Accomplishments

- New Logo & Brand
- Annual Infographic
- Conferences & Networking
- Research Listening Sessions
- Research Collaborations
- BBER Annual Economic Update
- Montana Outdoor Recreation Summit (Oct 11-13)
- Destination Insight Platform – Authorized Users
- Data Science Communication Specialist Hire



2023 Update – National Parks

Montana National Park Recreation Visitation: 1990-2023



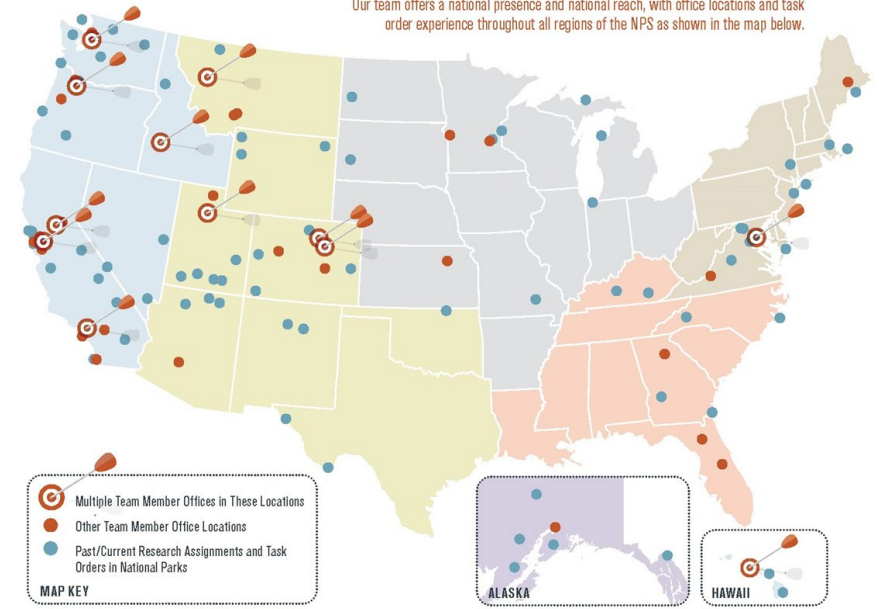
<https://irma.nps.gov/STATS/Reports/Park/YELL>

**YTD for 2023; not a full year*

National Parks Collaboration

- Great Basin National Park
- Badlands National Park
- Lassen Volcanic National Park
- Grant Kohrs Ranch National Historic Site
- Canyon de Chelly National Monument
- NPS Wildland Fire Communications
- National Survey of Educators
- Interagency Pass Program

Our team offers a national presence and national reach, with office locations and task order experience throughout all regions of the NPS as shown in the map below.



FY 25 TAC Project Proposals

1. Montana Dinosaur Trail & Paleo Tourism
2. Economic and Social Impact of Montana Museums on Local Communities
3. Impact of Conventions, Meetings & Retreats
4. Impact of Guided Hunting and Fishing on Nonresident Expenditures
5. Flathead Lake Levels Impacts on the Recreation Economy of Surrounding Communities
6. Factors Influencing Vacationers not to Visit Montana
7. Understanding Recreation Users of Canyon Ferry Lake

Questions?

Institute for Tourism & Recreation Research

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