ITRR Presentation to Tourism Advisory Council, October 2023

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

- Marketing
  - MT Tourism Office
  - Travel Regions
  - CVB
  - Chambers
  - Tourism businesses
  - Non-profits

- Policy
  - Federal
  - State
  - County
  - City

- Management
  - Land managers
  - Tourism businesses
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

- Flathead
- Missoula
- Central
- Dillon
- Bozeman
- Shelby
- Missouri River
- Eastern
- Billings
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.

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)
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

- Policy/Decision Making: 3.10%
- Land Planning: 3.10%
- Info Verification: 3.20%
- School: 3.80%
- Real Estate: 4.60%
- Presentation: 5.80%
- Knowledge Gain: 6.20%
- Business Plan: 6.50%
- Recreation Planning: 6.70%
- Economic Assessment: 7.10%
- Reports: 10.10%
- Marketing: 23.30%
## 2022 Montana Travel Industry

<table>
<thead>
<tr>
<th>Year</th>
<th>Nonresident Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>2022</td>
<td>12,409,000</td>
</tr>
<tr>
<td>2021</td>
<td>12,840,000</td>
</tr>
<tr>
<td>2020</td>
<td>11,202,000</td>
</tr>
<tr>
<td>2019</td>
<td>12,585,000</td>
</tr>
<tr>
<td>2018</td>
<td>12,343,000</td>
</tr>
</tbody>
</table>

### 2022 Estimates

- **12.5 million travelers**
- **Nonresident travel spending in Montana - $5.82 billion**

### Quarterly Breakdown

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Spending</th>
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<tbody>
<tr>
<td>Q1</td>
<td>11%</td>
</tr>
<tr>
<td>Q2</td>
<td>27%</td>
</tr>
<tr>
<td>Q3</td>
<td>47%</td>
</tr>
<tr>
<td>Q4</td>
<td>15%</td>
</tr>
</tbody>
</table>

- **Fuel** 28%
- **Restaurant, Bar** 17%
- **Hotel, Motel** 12%
- **Outfitter, Guide** 10%
- **Groceries, Snacks** 9%
- **Retail** 8%
- **Rental Cabin** 5%
- **Auto Rental** 4%
- **Licenses, Fees** 2%
- **Miscellaneous** 3%
2022 Montana Travel Industry

- **$758 MILLION**: 13% of state
- **$1.5 BILLION**: 27% of state
- **$265 MILLION**: 5% of state
- **$652 MILLION**: 11% of state
- **$1.6 BILLION**: 28% of state

*2021/2022 averaged estimate*
2018-2022 Montana Nonresident Traveler Expenditure and Visitation Trends

**Total Actual Expenditures**

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Expenditures (in millions)</th>
<th>Excluding Fuel</th>
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</thead>
<tbody>
<tr>
<td>2018</td>
<td>10,769</td>
<td></td>
</tr>
<tr>
<td>2019</td>
<td>11,020</td>
<td></td>
</tr>
<tr>
<td>2020</td>
<td>10,887</td>
<td></td>
</tr>
<tr>
<td>2021</td>
<td>11,729</td>
<td></td>
</tr>
<tr>
<td>2022</td>
<td>12,350</td>
<td></td>
</tr>
</tbody>
</table>

**Nonresident Visitors**

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Visitors (in thousands)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>10,769</td>
</tr>
<tr>
<td>2013</td>
<td>10,887</td>
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<tr>
<td>2014</td>
<td>11,729</td>
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<td>2015</td>
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<td>2017</td>
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<td>2018</td>
<td>12,640</td>
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<td>2021</td>
<td>12,506</td>
</tr>
<tr>
<td>2022</td>
<td>12,640</td>
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Vacationers Come to Montana for the Great Outdoors

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

Top vacationer activities in Montana:
• 45% go on day hikes
• 40% watch wildlife
• 37% engage in nature photography

Attractions
- Mountains/forests
- Open space/uncrowded areas
- Yellowstone National Park
- Glacier National Park
- Wildlife
- Lakes
- Family/friends
- Fishing
- Lewis & Clark history & culture
- Native American history & culture
- Montana history & culture
- Northern Great Plains/badlands
- Ski/snowboard
- Hunting
- Special events
- Resort or guest ranch

Primary Attraction
- Attractions
- Primary Attraction
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
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?

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