

Institute for Tourism & Recreation Research

An overview of Montana's travel and recreation research

**Megan Schultz, M.S.
Melissa Weddell, PhD, MBA**

FRANKE COLLEGE OF FORESTRY AND CONSERVATION

Institute for Tourism and Recreation Research



Dr. Melissa Weddell
Director & Research Faculty
melissa.weddell@umontana.edu



Carter Bermingham
Social Scientist and Research Assistant
carter.bermingham@umontana.edu



Dr. Elena Bigart
Social Scientist and Research Assistant
elena.bigart@umontana.edu



Glenna Brown
Program Assistant and Qualitative Specialist
glenna.hartman@umontana.edu



Kara Grau
Assistant Director of Economic Analysis
kara.grau@umontana.edu



Matthew Pettigrew
Data Engineer and Research Associate
matthew.pettigrew@umontana.edu



Megan Schultz
Project Manager and Research Associate
megan.schultz@umontana.edu



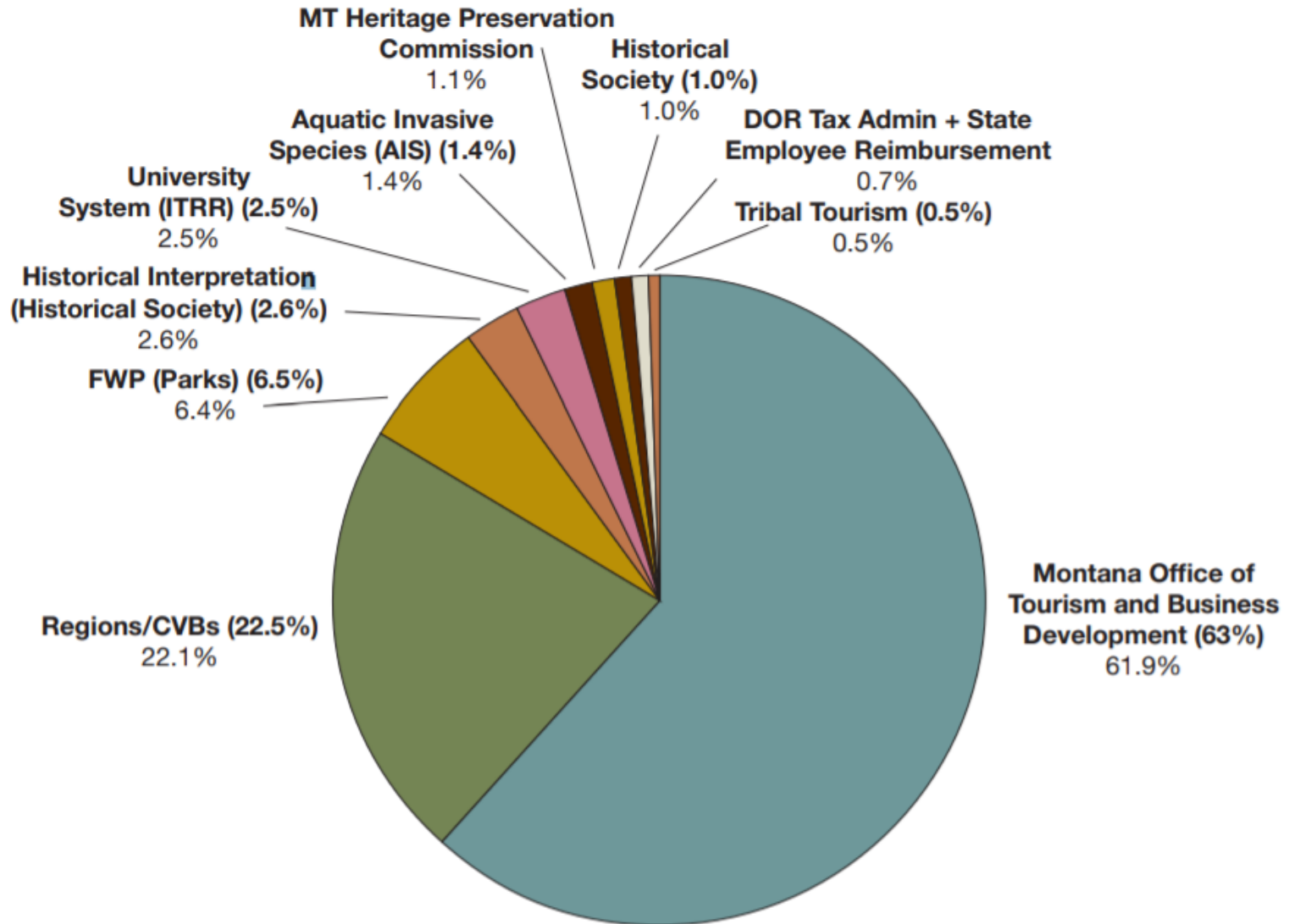
Liam Harry
Parks, Tourism, and Recreation Graduate
Student, ITRR Research Assistant
liam.harry@umontana.edu



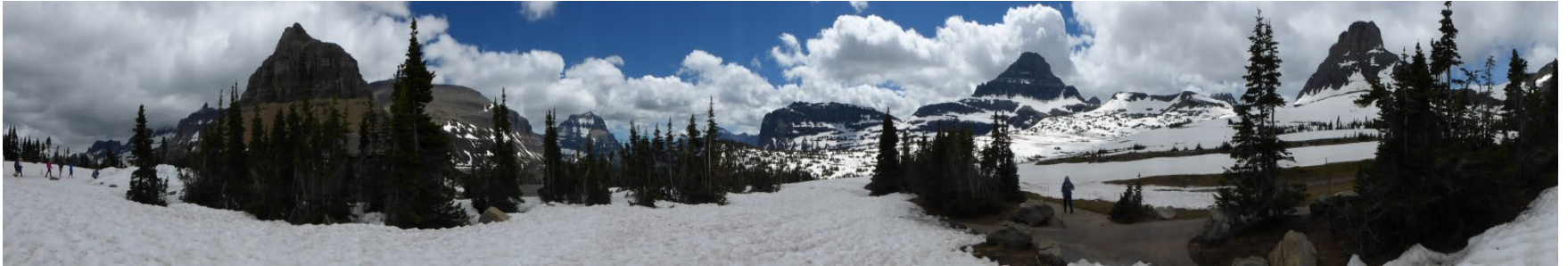
ITRR was established in 1987 to conduct objective research in tourism and recreation. ITRR is housed in the W.A. Franke College of Forestry and Conservation at The University of Montana-Missoula.

Majority of ITRR funding comes from 2.5% of the statewide bed tax.

DISTRIBUTION OF 4% LODGING FACILITY USE TAX*



ITRR provides citizens, leaders and policy makers with objective tourism and recreation research essential to making informed decisions for advancing Montana's economy while sustaining its natural resources.



Areas of Research

Nonresident travel (economic, visitation, characteristics, niches)

Resident travel, recreation, attitudes (economic, estimations, characteristics)

Niche – segmentation

Land management visitation & characteristic studies

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 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 to approve each year's research agenda.

Quarterly Nonresident Travel Data



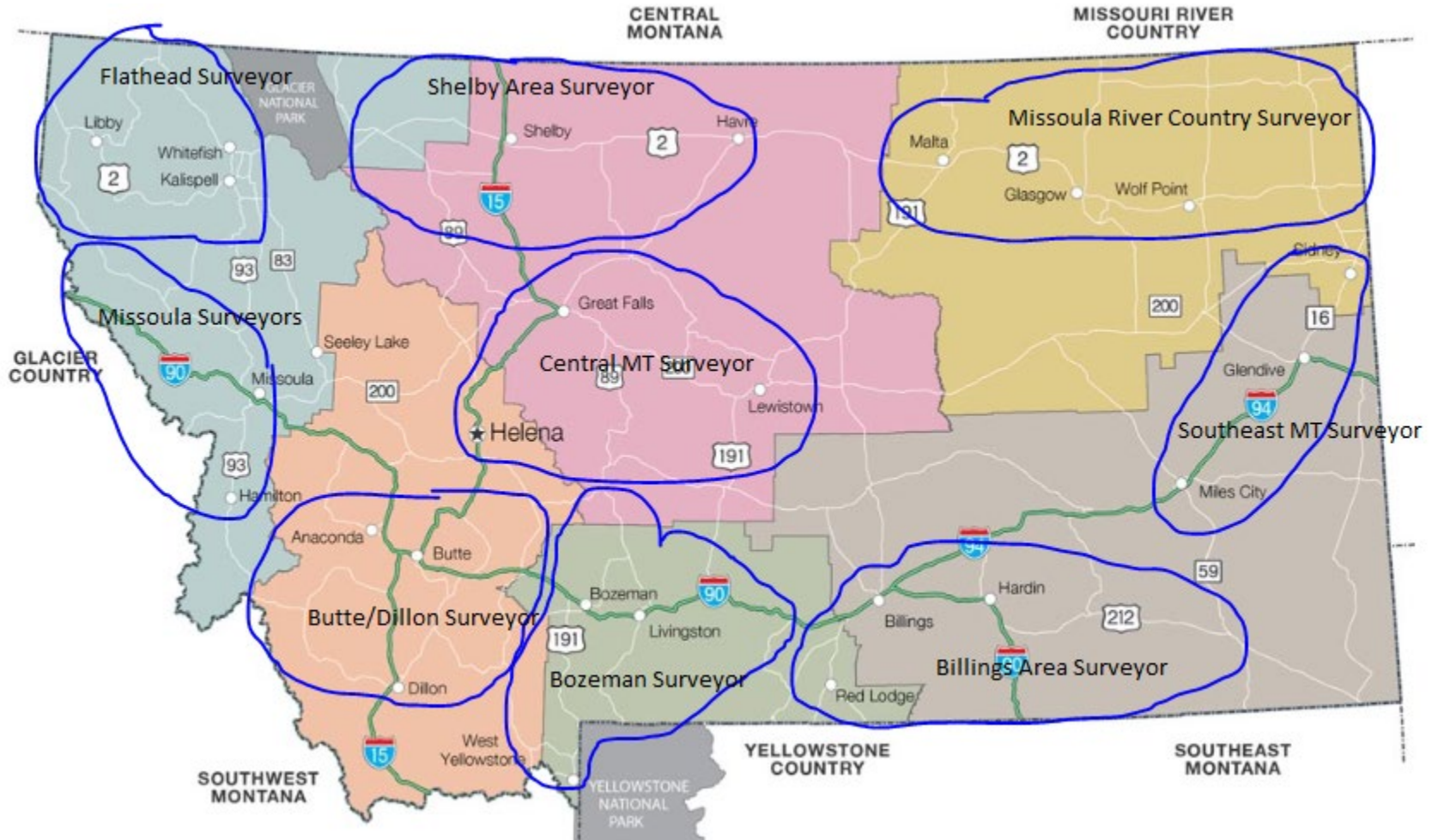
Data



Data Collection

- 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
 - Each working 29 hours per week*

Data Collection Territories



Scientific Approach to Data Collection

- Representative Sampling
- Surveying and Proportion Counts
 - Unbiased locations
 - Gas stations, rest areas, airports
 - Variation in the days and times worked allows for representative data collection
- Understanding travel groups
 - Each vehicle
 - Because of doing those proportion counts
 - Reporting: Average Daily Group Expenditures

Getting the Big \$

avg. daily group expenditure

(from survey data)

X

avg. length of stay

(from survey data)

X

total # of groups

(from the visitation model)

=

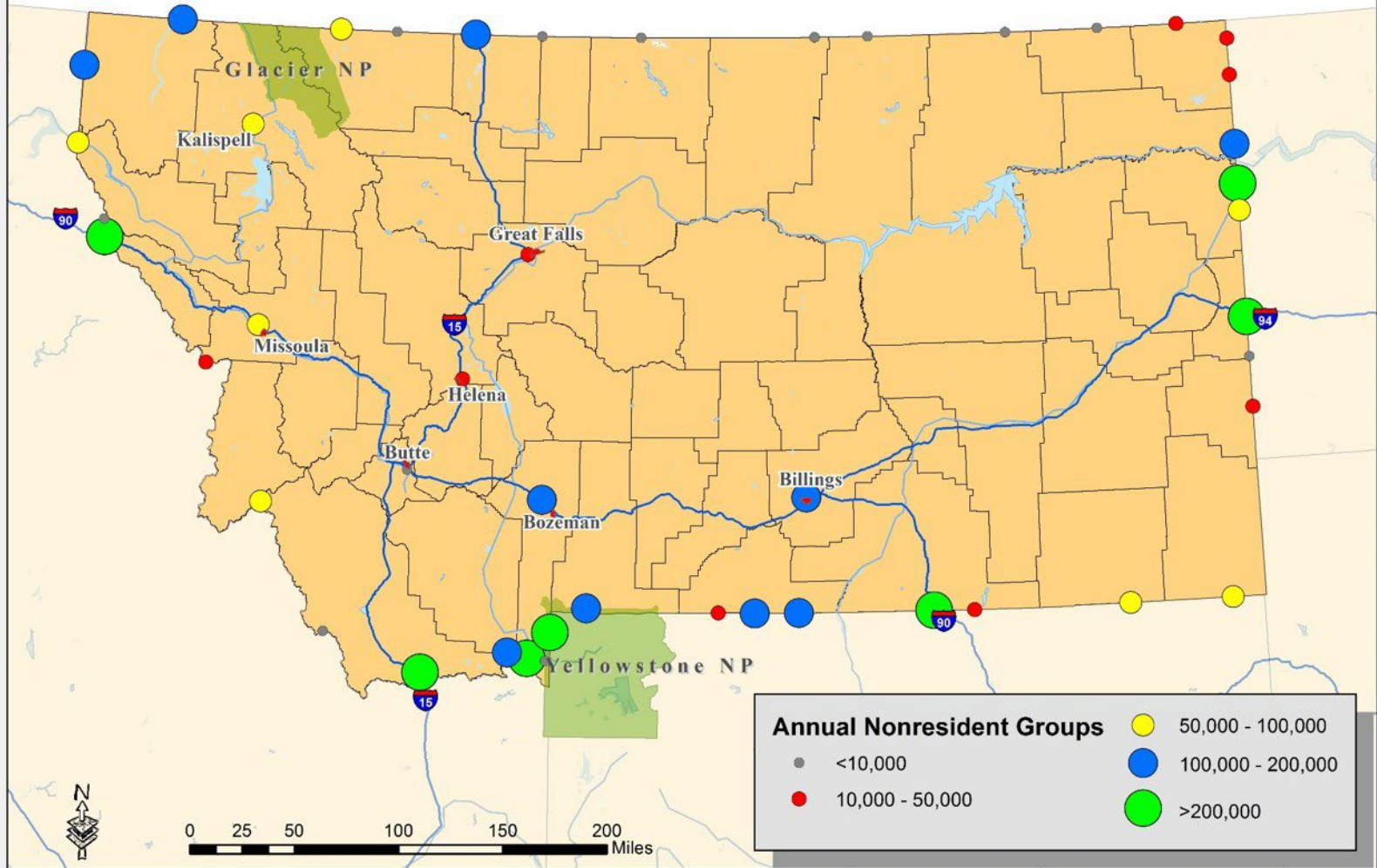
estimate of total nonresident travel spending in the state

Table 1 - 2019 Nonresident Traveler Expenditures¹

Expenditure Category	Average Daily Per Group ^{2,3}	Allocation by Category	Total Expenditures ^{2,4}
Gasoline, Diesel	\$34.49	23%	\$860,770,000
Restaurant, Bar	\$27.55	18%	\$681,020,000
Hotel, Motel	\$20.09	13%	\$496,440,000
Outfitter, Guide	\$15.30	10%	\$375,160,000
Retail sales	\$14.39	10%	\$357,820,000
Groceries, Snacks	\$12.21	8%	\$303,760,000
Licenses, Entrance Fees	\$8.85	5%	\$204,990,000
Auto Rental	\$5.67	4%	\$139,120,000
Rental cabin, Condo	\$4.90	3%	\$116,700,000
Made in MT	\$3.26	2%	\$80,840,000
Campground, RV Park	\$1.99	1%	\$50,110,000
Misc. Services	\$1.81	1%	\$43,500,000
Vehicle Repairs	\$1.12	1%	\$28,300,000
Gambling	\$0.57	<1%	\$14,200,000
Farmers Market	\$0.30	<1%	\$7,290,000
Transportation Fares	\$0.04	<1%	\$860,000
Estimated Total	\$152.54		\$3,760,880,000

Montana Entry Points

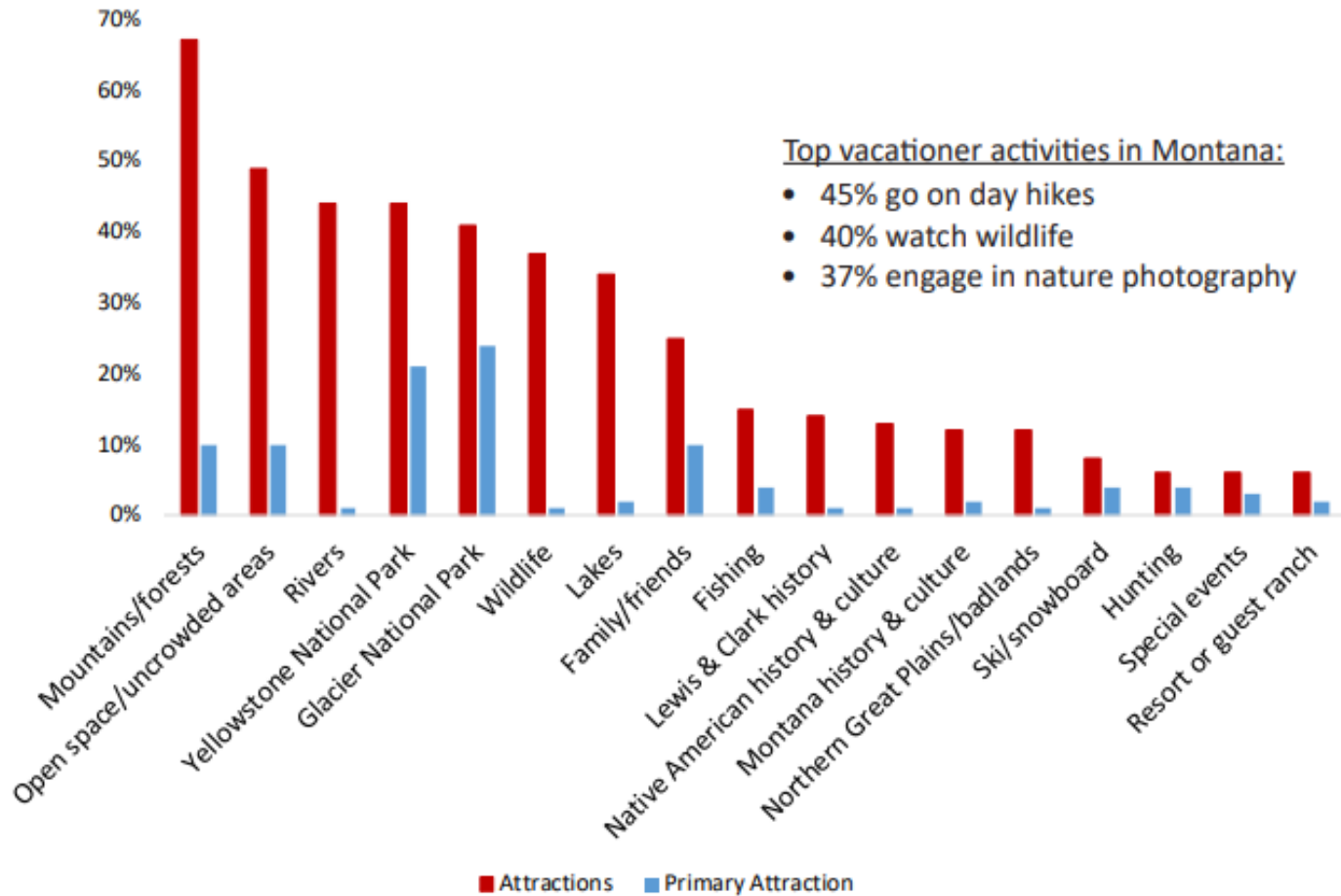
Total 2015 Groups = 5.3 Million



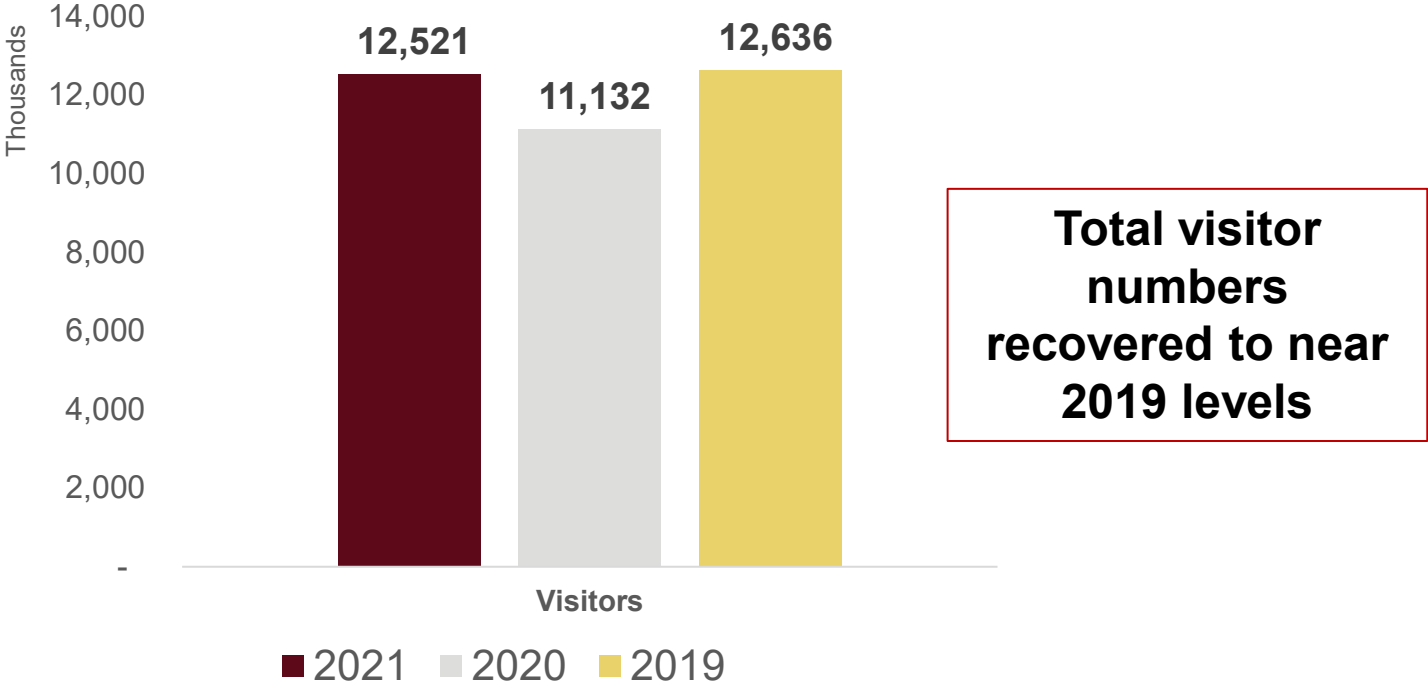
Nonresident Travel in Montana

Vacationers Come to Montana for the Great Outdoors

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

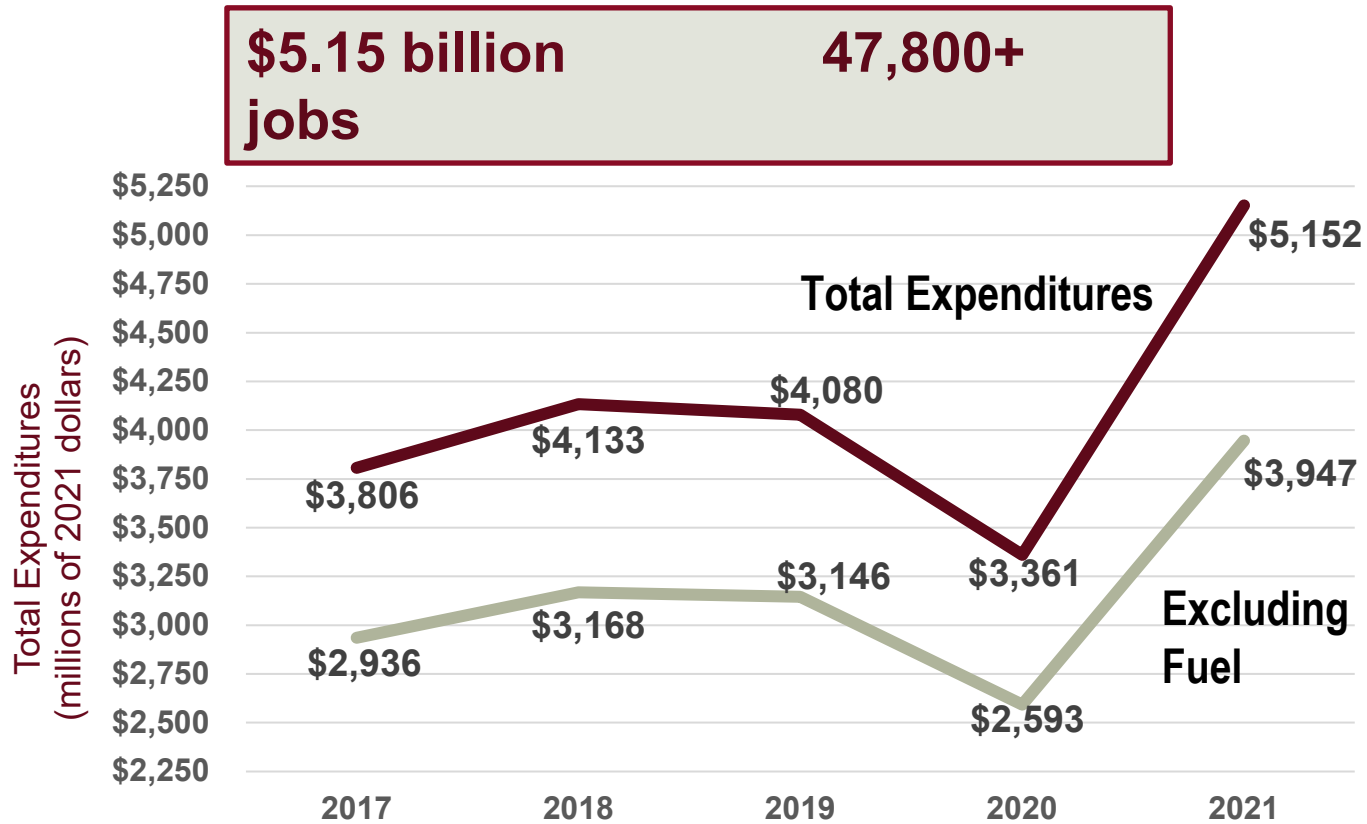


Nonresident Visitors



Source: Institute for Tourism and Recreation Research

2021 Total Nonresident Travel Spending in MT



Source: Institute for Tourism and Recreation Research

Montana State Parks

MONTANA STATE PARKS SEE RECORD SETTING VISITATION IN 2020

Top five most visited parks through September 2020:

- 1- Flathead Lake State Park (all units): **+33.5%** YoY
- 2- Cooney Reservoir State Park: **+26%** YoY
- 3- Giant Springs State Park: **-0.2%** YoY
- 4- Lake Elmo State Park **+25.7%** YoY
- 5- Thompson Chain of Lakes State Park **+42.5%** YoY



System wide, Montana's parks hosted 3 million visitors; a 24.4% increase over 2019.

80% of parks saw increases from 2019 to 2020.c

Source: Montana FWP

National Parks Collaboration

- **May 2020** – ITRR part of new IDIQ contract team
- **IDIQ Contract**
 - 5 year, \$40 million
 - Contribute to the data-driven decision making across the NPS



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 Kit Uses

- Potential for smaller areas to do data collection and help with marketing plans and applying for grants
- Buying this information from consultants \$\$\$



Resident Surveys

- State-wide data collection
- Topics/questions change every 3 months
- Representative
 - Data weighted by US Census info
 - county of residence
 - gender
- Examples
 - AIS, Recreate Responsibly, Outdoor Rec

Resident Attitudes Towards Tourism

- Tracking resident attitudes since 1992
 - The overall benefits outweigh the negative impacts
 - If tourism increases, quality of life for residents will improve
 - The state is becoming overcrowded because of more tourists

Residents' Attitudes Towards Tourism: 4th Quarter 2020

MT Expression Research Report 2021-2

Carter Bermingham, M.S.
Megan Schultz, M.S.
Kara Grau, M.S.

1/1/2021



The Montana Expression 2020: Residents' Attitudes Towards Tourism

MT Expression Research Report 2020-12

Carter Bermingham, Kara Grau, Norma P. Nickerson, Ph.D., & Megan Schultz
10/15/2020



Montana Residents' Perceptions of Visitors' Behavior: The Summer of 2020 Compared to Years Past

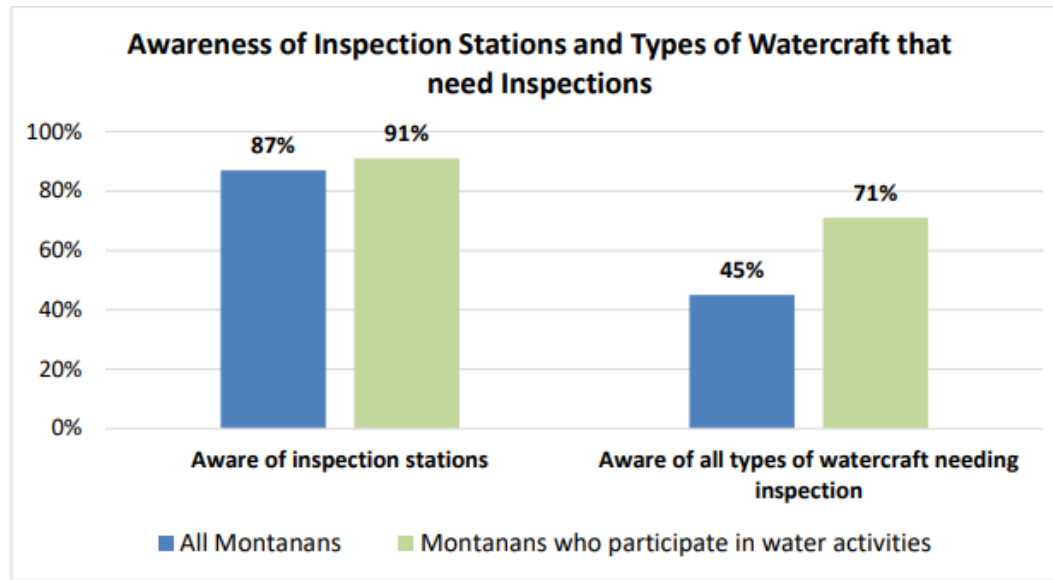
MT Expression Research Report 2020-14

Carter Bermingham & Megan Schultz
12/7/2020



AIS Resident Questions 2018

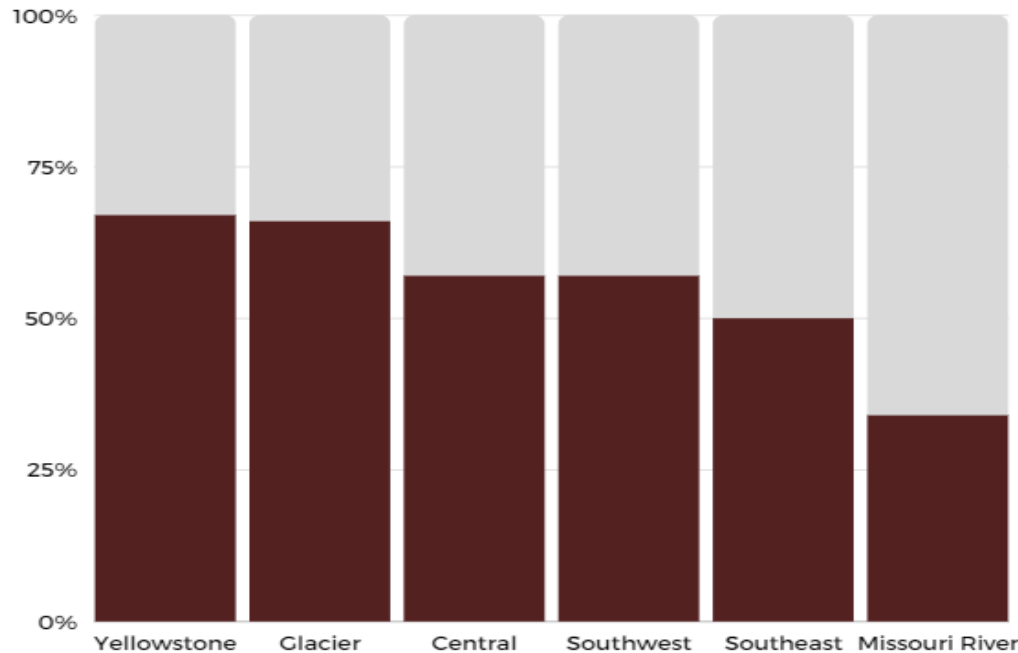
- Participation in Water Recreation
- Awareness
 - Inspection Stations
 - Watercraft required to stop



RESIDENT PUBLIC LAND USE

HAVE YOU CAMPED IN MONTANA IN THE PAST 12 MONTHS?

■ Yes ■ No



MONTANA TRAVEL REGIONS

36%

Visited new public lands

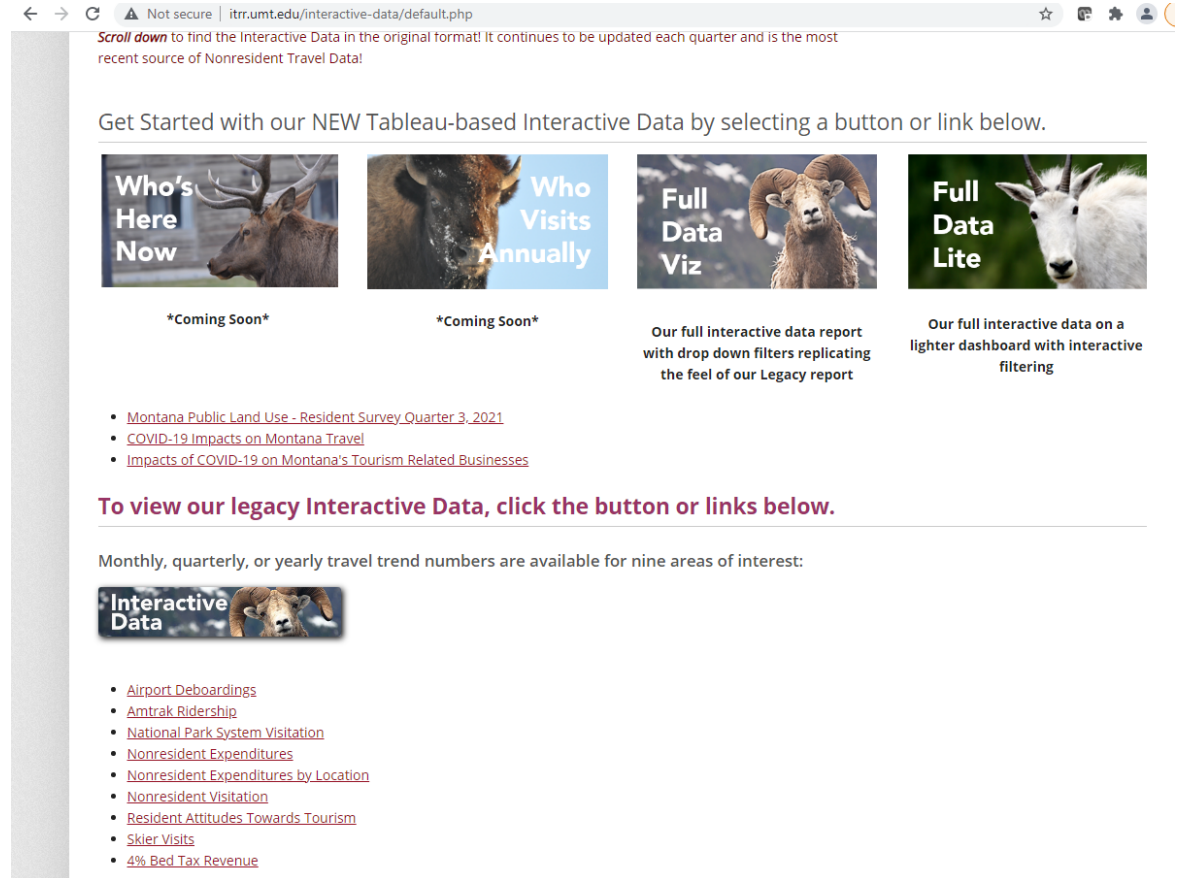
17%

Participated in new activities

ITRR Website

Interactive Data

- Original Report Builder
- New Data Visualization
- Trend Data



The screenshot shows a web browser window with the URL itr.umd.edu/interactive-data/default.php. The page content includes:

Scroll down to find the Interactive Data in the original format! It continues to be updated each quarter and is the most recent source of Nonresident Travel Data!

Get Started with our NEW Tableau-based Interactive Data by selecting a button or link below.

Four interactive data options are displayed:

- Who's Here Now** (with a deer image): *Coming Soon*
- Who Visits Annually** (with a bison image): *Coming Soon*
- Full Data Viz** (with a ram image): Our full interactive data report with drop down filters replicating the feel of our Legacy report
- Full Data Lite** (with a goat image): Our full interactive data on a lighter dashboard with interactive filtering

Below these options is a list of links:

- [Montana Public Land Use - Resident Survey Quarter 3, 2021](#)
- [COVID-19 Impacts on Montana Travel](#)
- [Impacts of COVID-19 on Montana's Tourism Related Businesses](#)

To view our legacy Interactive Data, click the button or links below.

Monthly, quarterly, or yearly travel trend numbers are available for nine areas of interest:

Interactive Data (with a ram image)

- [Airport Deboardings](#)
- [Amtrak Ridership](#)
- [National Park System Visitation](#)
- [Nonresident Expenditures](#)
- [Nonresident Expenditures by Location](#)
- [Nonresident Visitation](#)
- [Resident Attitudes Towards Tourism](#)
- [Skier Visits](#)
- [4% Bed Tax Revenue](#)

Thank you!

- <https://itrr.umt.edu>
- Contact info: <https://itrr.umt.edu/contact/default.php>
 - Megan Schultz: megan.schultz@umontana.edu
 - 406-243-6454
 - Melissa Weddell Melissa.weddell@umontana.edu
 - 406-243-2328
- All published reports: https://scholarworks.umt.edu/itrr_pubs/
- Nonresident travel data and trends: <http://www.tourismresearchmt.org/>