

FY19 University Travel Research Program

The legislatively appropriated dollars for the Travel Research Program for FY19 is \$802,000. The proposed projects for FY19 listed below total \$858,000. Budget savings from previous years of \$56,000 can be applied to FY19. The total dollars currently available for FY19, therefore is \$858,000.

On October 1, 2017, the TAC research committee prioritized the projects. On January 18, 2018, the TAC research committee approved the projects which fit within the budget and amount of carry-over available from the previous year.

FY19 Proposed Projects and Administration Budget

<u>On-Going Projects</u>	<u>Operating</u>	<u>Salary/ Benefits</u>	<u>Total</u>
1. Quarterly Nonresident and Resident Travel and Recreation Analysis	\$90,325	\$356,315	\$446,640
2. 2018 Economic Impacts and 2019 Outlook	\$5,200	\$65,665	\$70,865
3. Tourism and Recreation Monitoring	\$10,300	\$26,620	\$36,920
4. ITRR Data Mining (includes transportation zone of influence/attractions)	\$500	\$40,820	\$41,320
5. Panel Studies	\$1,025	\$21,160	\$22,185
6. Survey Kits	\$0	\$13,430	\$13,430
7. Emerging Issues	\$0	\$8,330	\$8,330
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<u>One-Time Projects</u>			
1. What are repeat visitors looking for on a return trip?	\$0	\$9,080	\$9,080
3. Indian Country cultural and heritage tourism	\$4,225	\$29,260	\$33,485
4. Economics and characteristics of alpine skiing in MT**	\$11,500	\$17,540	\$29,040
7. Motorcycle touring	\$0	\$18,165	\$18,165
8. Using tourism to recruit new business	\$7,000	\$19,660	\$26,660
10. Tourism's impact on rural communities	\$500	\$6,660	\$7,160
11. Community tourism development case study – Gardiner (after development)	\$8,600	\$18,160	\$26,760
Administration	<u>\$14,500</u>	<u>\$53,460</u>	<u>\$67,960</u>
TOTAL	\$153,675	\$704,325	\$858,000

*Operating includes supplies, travel, repairs, software, insurance, publications, communications, postage, printing, conferences, computers, contracted services, maintenance, subscriptions, background checks, network charges.

**Total cost of the ski study is \$54,040. MT Ski Area Association is funding \$25,000 of the total.

Quarterly Nonresident and Resident Travel and Recreation Analysis

Introduction

In July 2009, ITRR began the nonresident visitor survey throughout the state. This on-going, high-value project provides the quarterly data which is uploaded into the report builder for anyone to use for decision making, presentations, and planning. It also provides the nonresident visitation numbers to Montana, spending data and economic impact of tourism to the state.

Purpose and Objectives

The main purposes of this project are to: 1) assess nonresident visitor characteristics on an on-going basis; 2) estimate nonresident visitor numbers quarterly; 3) estimate nonresident expenditures quarterly, and; 4) provide quarterly data on the report builder for users to profile the characteristics of any nonresident visitor segment. A secondary purpose of this project is to further assess or explore nonresident niche markets as the need for exploration presents itself. The final purpose is to intercept residents (when nonresidents are not available) to ask custom questions that emerge as important tourism or recreation related topics.

Nonresident and Resident Visitor Study Objectives:

- Describe visitors to Montana in terms of demographics, trip characteristics, travel behavior, and expenditures in the state on a quarterly basis.
- Update information used in ITRR's model to estimate quarterly and annual visitation and economic impacts.
- Utilize existing survey personnel for niche market surveys and/or addressing travel research needs as they arise.
- To survey residents on emerging tourism and recreation related topics (when nonresidents are not available to survey).

Methods

- 1) Front-end intercept survey: Nonresidents are intercepted at Montana's gas stations, rest areas, and airports. This portion of the nonresident survey asks basic questions about their trip, demographics, and spending on an iPad. When nonresidents are not available, the surveyor will intercept residents with different questions each quarter.
- 2) Mail-back or on-line survey: After nonresidents have been asked the questions on the above front-end intercept survey, they are provided a longer survey in a postage paid envelope. They can choose to complete the printed version or access the survey on-line. This additional data includes activities, sites visited, routes driven, attractions to the state, information sources used, and lodging type.
- 3) Supplemental surveys: methodology for niche markets or other research needs will either be on-site interviews, on-line surveys or mail-back surveys.
- 4) Proportion counts: At a sample of Montana borders which are utilized in ITRR's model for estimating nonresident visitation to the state, and six of the airports (Billings, Bozeman, Great Falls, Helena, Kalispell, and Missoula), surveyors will conduct sample counts of nonresident vehicles entering the state and nonresident visitors boarding planes at the airports.

Outcomes

- Quarterly data will be cleaned, coded, and uploaded to the ITRR website interactive data tool for use by the public to produce their own summaries regarding nonresidents to MT.
- Economic impact of nonresident visitation to MT is generated from this data set on an annual basis (see next project description) while spending is estimated on a quarterly basis.
- Press releases and presentations will be part of the dissemination of the results.

Anticipated Timeframe: on-going

	<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
Quarterly Nonresident and Resident Travel and Recreation Analysis	\$90,325	\$356,315	\$446,640

2018 Economic Impacts and 2019 Outlook

Purpose and Objectives

The purpose of the study is to estimate annual nonresident visitation to Montana, the economic impact of visitors to Montana, and to project visitation for the year 2019. The objective is to get this information out to as many Montanans as possible through Economic Outlook Seminars (9 Montana cities), the 2019 Outlook article, the Governor's Conference on Tourism and Recreation, and other group events around the state.

Objectives:

- To estimate 2018 visitation through secondary data sources and ITRR nonresident data.
- To project 2019 tourism and recreation visitation numbers based on trend data, national projections, and indicator data from the state and region.
- To conduct the annual outlook survey to MT tourism business owners and operators.

Outcomes

The following information will be provided from this project:

1. The Tourism and Recreation Outlook 2019 will be presented with the Bureau of Business and Economic Research to nine cities in Montana (Helena, Great Falls, Missoula, Billings, Bozeman, Butte, Kalispell, Sidney and Miles City), and for other groups and conferences as requested.
2. The ITRR Travel Outlook article.
3. Preliminary 2018 economic and visitation figures, used by tourism related business and agencies for planning, will be available in mid-December 2018 and final numbers available in late May 2019.
4. Reports, press releases, presentations, and website updates will all be part of the information dissemination.

Anticipated Timeframe: On-going

	<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
2018 Economic Impacts and 2019 Outlook	\$5,200	\$65,665	\$70,865

Tourism and Recreation Monitoring

Purpose and Objectives

The purpose of this project is to provide travel, tourism, and recreation trend data to the public through website updates and email summaries. Information and data for this project is a combination of primary data collection, secondary data, and reports from other entities.

Objectives include:

- Continually collect and update trend data on the ITRR interactive data web page to include: skier visits, airport deboardings, Amtrak, 3-question resident attitude, nonresident visitation, nonresident expenditures, nonresident expenditures by location, National Park Service visitation, and the 4% bed tax revenues.
- Disseminate travel data and research from reliable companies, e.g. STR Lodging, USTA, U.S. Dept. of Commerce.
- To collect, summarize, and distribute regional and national tourism research information to Montana CVB's, travel regions and the MT Office of Tourism and Business Development as it becomes available.

Outcomes

1. The interactive web page will be updated as needed and new trend data sets will be updated annually, quarterly or monthly depending on the type of data.
2. As new data becomes available, press releases will be written and disseminated around the state through UM news media.

3. TAC, Montana Office of Tourism and Business Development, regions, and CVB's will receive updates on travel trends in the region, nation, and international.

Anticipated Timeframe: On-going

	<u>Operating</u>	<u>Salary/ Benefits</u>	<u>Total</u>
Tourism and Recreation Monitoring	\$10,300	\$26,620	\$36,920

ITRR Data Mining

Purpose

This project will allow ITRR to mine data sets, including the nonresident data set, when it is not possible to extract information through the interactive web page. When questions arise that cannot be answered with the interactive report builder on the website or through previous niche news and reports, ITRR staff will generate the report if the sample size is adequate and if the request is useful beyond an individual's use.

Yearly reports generated:

- **Economic impacts on counties and regions**
- **Spending of airline travelers by MT airport**

Reports to be generated:

- **Regional transportation analysis: Major attraction zone of influence.** This project was a specific request and ITRR determined that mining several years of the nonresident survey data in the "main attraction" category will provide the zone of influence of these attractions. This includes everything from landscape to historic features, parks, and some activities.

Possible reports to be generated:

- **Additional analysis of niche activities data.** Depending on the needs of MOTBD and others this could be one or numerous reports to look more specifically at activities. **Compare 1st time visitor to repeat visitor** (where stayed and activities)
- **Canadian visitation trends.** Trends in length of stay, spending per visit, visitation numbers, purpose of trip, and other trip characteristics.

Methods

Data will be extracted from the available data sets and analyzed by the chosen topic. Where appropriate, correlations and multivariate analysis will be conducted on data to provide further insights into the Montana traveler.

Outcomes

1. Reports, press releases, presentations, and website updates will all be part of the information dissemination.
2. Journal articles will be written and submitted for publication.

Anticipated Timeframe: on-going

	<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
ITRR Data Mining	\$500	\$40,820	\$41,320

Panel Studies

ITRR is using the university survey software, Qualtrics, as our tool for panel studies. Email contacts of people who are previous visitors to MT, have shown an interest in visiting MT, or are currently visiting and agree to sign up for further research are part of this panel. New email contacts are added to the panel each quarter. In addition, ITRR has been gathering resident members and is able to conduct research on residents. Panel studies are a quick and relatively easy way to assess the current climate of travel and recreation. As questions come up in the industry, this method can be used to

answer those questions. For example, the impact fires and smoke have on visitors was assessed shortly after the 2017 fire season.

Possible reports generated:

- Repeat visitor analysis (see project description: Repeat vacationers: What are they doing? Where are they going)?
- Emerging issues that affect Montana tourism or Montana visitors (as needed)

Methods

Members of the panel will be sent an email asking them to participate in the study. One or two reminder emails will be sent for each study.

Outcomes

1. Reports, press releases, presentations, and website updates will all be part of the information dissemination.
2. Journal articles will be written and submitted for publication.

Anticipated Timeframe: Ongoing

	<u>Operating</u>	<u>Salary/ benefits</u>	<u>Total</u>
Panel Studies	\$1,025	\$21,160	\$22,185

Emerging Issues

In these constantly changing times with emerging issues that seem to pop up overnight (e.g., Yellowstone River closure, Aug. 2016, national park fee increase proposal, Nov. 2017), it is imperative that up-to-date data is collected, analyzed, and dispersed so the public can make informed decisions related to policy, marketing, or management. A fund set aside for these types of projects allows for reactions to emerging issues.

Purpose

The purpose of this project is to respond to emerging regional or state-wide issues that create or potentially create instability in the tourism economy.

Methods

Two methods will be used to identify suitable cases qualifying as emerging issues:

- Issues identified by industry personnel (TAC, Office of Tourism and Business Development, Regions, CVB’s, businesses or land managers), will be brought to ITRR. ITRR will write up a formal statement of the issue and the methods to be used, and then contact the TAC research committee for approval.
- Issues identified by the Dean of the W.A. Franke College of Forestry and Conservation will be vetted with ITRR, and then ITRR will inform the research committee and the TAC of the project to be undertaken.

Outcomes

1. Reports, press releases, presentations, and website updates will all be part of the information dissemination.
2. Journal articles will be written and submitted for publication if appropriate.

Anticipated Timeframe: Ongoing

	<u>Operating</u>	<u>Salary/ benefits</u>	<u>Total</u>
Emerging Issues		\$8,330	\$8,330

Survey Kits

Purpose and Objectives

The purpose of the survey kit is to assist communities, organizations or event managers in research about their visitors in terms of characteristics, satisfaction, and spending.

Methods

Survey collection methods are determined by the type of event to be researched. The methods range from email surveys to intercept surveys.

Outcomes

1. Usually between 4 and 7 survey kits are conducted each year
2. A report is written for the community or organization describing the visitor characteristics, satisfaction of the event and spending by visitors.
3. If a total count of participants is obtainable, the total dollar contribution of the event can be assessed.

Anticipated Timeframe: on-going

	<u>Operating</u>	<u>Salary/ benefits</u>	<u>Total</u>
Survey kit	\$0	\$13,430	\$13,430

Repeat Vacationers – What are They Doing, Where are They Going?

Introduction

In 2008, ITRR conducted a study to understand the repeat visitor to Montana: http://scholarworks.umt.edu/itrr_pubs/93/. That study revealed, through in-depth interviews of repeat visitors, that people do come back to visit other places in Montana after first visiting Yellowstone or Glacier, but they still continue to visit the parks as well. It also found that a small percent of visitors first came to Montana, not for the parks, but for a specific activity such as fishing. That study is a decade old. Do current visitors still behave similarly as those from 10 years ago?

Purpose and Objectives

The overall purpose of this study is to build an understanding of the primary motivators of return visitors to Montana through assessing what return vacationers do while in Montana and why. A secondary purpose is to determine if there are ways to get return visitors to visit new areas in the state.

Objectives

- To assess places visited, reasons for return, length of stay, demographics, and routes traveled.
- To assess reasons why visitors do similar or new activities on return visits.
- To assess reasons why visitors go to the same or different places on return trips.

Methods

Methods of data collection will be past research (literature review) and an on-line panel survey of previous visitors to Montana. The panel members have been to Montana in the past and are the exact type of respondent needed for this study. Currently there are over 4,000 nonresident panel members who have been to Montana in the past.

Outcomes

This project would be able to highlight ideas for Montana tourism promotion entities interested in encouraging repeat visitors to their area of the state. It would provide a complete picture of who returns and why.

1. Reports, press releases, presentations, and website updates will all be part of the information dissemination.

Anticipated Timeframe: July 2018-June 2019

	<u>Operating</u>	<u>Salary/ benefits</u>	<u>Total</u>
Repeat vacationers: what are they doing, where are they going?	\$0	\$9,080	\$9,080

Indian Country Cultural and Heritage Tourism

Introduction

Montana is home to numerous Native American tribes that encompass diverse customs and resources. Do visitors to Montana have a desire to learn about our Native American history and culture? Cultural tourism, especially Indian Country tourism, has largely been underdeveloped in Montana, limiting the visitor experiences for tourists and the positive economic aspects of tourism for the Native American tribes. To effectively develop and expand cultural tourism in Montana, there is a need to understand the desire and needs of visitors to Native American reservations and then design an actionable plan to assist Indian Country in their tourism development.

After discussion with folks at the State Tribal Economic Development (STED) office, this study could be the first step in understanding both the desired experiences of visitors and the direction that Indian tourism development could take to be successful. The Blackfeet Indian reservation would be the case study for this research. The Blackfeet have indicated a desire to move forward with Indian tourism assessment on their reservation.

Purpose and Objectives

The purpose of this research is two-fold. First, it is important to understand who the potential visitors are and what their tourism needs would be when visiting an Indian reservation. Second, through a case study of one reservation, tourism development ideas will be vetted and planned as a call to action for the Blackfeet.

Objectives

- To assess potential visitor needs and desired experiences when visiting and learning about Indian history and culture.
- To conduct an analysis of Blackfeet tourism needs followed by a tourism action plan.

Methods

First, UM researchers will work with the State Tribal Economic Development office throughout the duration of this study so as to respect the cultural and historical values of the native peoples. According to STED, a tourism Native American experience could be defined as: An experience at a site/location affiliated with a tribe (battlefield, museum, cultural location that is appropriate for visitors) or participation in a Native American activity (powwow, visitor-appropriate cultural tradition, guided tours, etc.). The STED will assist in supplying the most appropriate language for surveys that honors Indian Country but also is understandable to prospective tourists/survey participants.

Two distinct methodologies will be used.

1. An on-line panel survey of past visitors to Montana as well as travelers who have not been to Montana will be asked about their interest in Native American culture. Among other areas of study, this panel survey will assess the following:
 - a. What types of Native American activities are travelers interested in? Are visitors interested in Indian Country-only vacations or do they want a couple Native American experiences added on to their Montana itineraries?
 - b. How many Native American experiences on a typical trip are visitors interested in?
 - c. Are visitors interested in guided or self-guided experiences? Immersive or passive Native American experiences?
 - d. Where do people want to go and why are they visiting? To what extent is Native American history of interest to them on a vacation?
 - e. Are visitors looking for planned itineraries or just suggested sites?
 - f. What types of infrastructure do visitors desire (accommodations, restaurants, etc.)?
 - g. What might visitors be willing to spend on a native experience?
 - h. Demographics of respondents.
2. A Blackfeet specific tourism assessment with tribal leaders and community members will be conducted. This community workshop or individual interviews would be recorded and data analyzed in qualitative software programs such as NVivo.

Outcomes

This study will provide the first step in understanding the needs of visitors who desire a Native American experience and the various levels of experiences people would like. In addition, data from the visitors will inform the case study of the Blackfeet Nation for a tourism action plan. That case study will act as a template for other reservations interested in tourism development.

1. Reports, press releases, presentations, a thesis, and website updates will all be part of the information dissemination.

Anticipated Timeframe: July 2018-June 2019

	<u>Operating</u>	<u>Salary/ benefits</u>	<u>Total</u>
Indian Country Cultural and Heritage Tourism	\$4,225	\$29,260	\$33,485

Economics and Characteristics of Alpine Skiing in MT: Repeat of 2009-10 study

Purpose and Objectives

The purpose of this study is to assess the current status of the alpine ski industry in Montana through an analysis of the characteristics of the industry and its economic contribution to the state. To address this purpose, the following objectives are developed:

Objectives:

- To identify demographics and alpine skier trip characteristics at Montana ski areas.
- To estimate in-state and nonresident ski trip expenditures.
- To estimate the economic impact of the Montana alpine ski industry on Montana's economy.

Methods

Three methods will be used in gathering information for the study.

- 1) A web based business survey of the ski resorts will be conducted. Big Sky, Bridger Bowl, Whitefish, Red Lodge, Discovery, and Showdown ski areas will be asked to anonymously provide information on all resort expenses including such things as payroll, insurance, repairs and maintenance, equipment, marketing, and office expenses, as well as all revenues.
- 2) An on-site skier survey will be conducted at Big Sky, Bridger Bowl, Whitefish, Red Lodge, Discovery, and Showdown ski areas on sample days throughout the ski season to assess ski trip expenditures and overall trip characteristics.
- 3) An on-site proportion count of resident and nonresident skiers at Big Sky, Bridger Bowl, Whitefish, Red Lodge, Discovery, and Showdown ski areas will be conducted at random and stratified days and times throughout the ski season.

Methodology for the skier survey includes 4 survey/proportion collection days per month (2 weekdays and 2 weekend days) for 16 collection days per ski area. It also includes 16 day ski passes per surveyor at each resort for the surveyor (provided free by the ski resort). Proportion counts will be conducted in the morning at the main chairlift for 2 hours followed by 7 hours of surveying.

Outcomes

The following outcomes will be provided from this project:

- 1) Reports, press releases, presentations, and website updates will all be part of the information dissemination.

Anticipated Timeframe: July 2018 – May 2019

Project Costs:

	<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
Economic Impact of the MT Alpine Ski Industry	\$11,500	\$17,540	\$29,040
\$25,000 is being provided for this study by MSAA (MT Ski Area Assoc.) Total Project costs:			\$54,000

Motorcycling Touring

Introduction

Anecdotally, people around the state have observed that motorcyclists are more willing to take rural routes and roads than major interstate highways when available. In fact, visitor center workers are asked for alternative routes when traveling through Montana or in-route to national parks. It has been observed that motorcyclists are more willing than other segments to stay in motels that are most likely family-owned lodging properties with doors that open into parking lots. And, they appear to be willing to try more local restaurants and bars. If accurate, this makes this segment an ideal one for tourism regions that do not have national parks, but do have small towns with these type of amenities along alternate routes.

Purpose and Objectives

The purpose of this study is to investigate the habits, characteristics, and travel needs of touring motorcyclists.

Objectives

- To gather demographics: age, number in traveling party, departure point, and specific destination location(s)
- To assess travel behavior such as:
 - Is your trip planned around a specific event?
 - Why are you traveling at this time of the year? What is your preferred month to travel?
 - What resources were used in planning the route, both in advance and on the road?
 - What route(s) are you taking through Montana? Would you be willing to travel alternative routes if provided the necessary information?
 - Where did you stay/are you staying (type of lodging)? Are you looking for any specific amenities or services in a lodging property?
 - Where did you eat or prefer to eat (type of food and beverage)? Are you looking for any specific amenities or services in food, beverage, retail, entertainment experiences?
 - What type of information would you like to receive on your trip through Montana that would help you to plan a return visit?
- To assess the positives and negatives of riding in Montana. What recommendations do they have to enhance the travel experience for motorcyclists visiting Montana?

Methods

At the time of this writing I have emailed and called the American Motorcyclist Association (200,000 members), Gold Wing Road Riders Association (72,000 members), BMW Motorcycle Owners of America (32,000 members) to assess their interest in working with us on the project. Currently BMW Motorcycle Owners of America is interested in emailing our survey to their members. The American Motorcyclists Association is willing to be part of the study through emails as well, however we are still discussing the details. There has been no response from Gold Wing to date. Ideally we would send each group the link to our questionnaire and they could send it on to their membership.

Outcomes

The analysis and description of motorcycle riders will be written into a report to be used by all MT CVB's, regions, and other promotional entities to determine if this niche market is one they would like to promote. In addition, the recommendations provided by the riders will assist in possible infrastructure development. Understanding the needs and behaviors of motorcycle tourism will aid in designing promotion to Montana specifically for this group of visitors.

1. Reports, press releases, presentations, and website updates will all be part of the information dissemination.

Anticipated Timeframe: July 2018-June 2019

	<u>Operating</u>	<u>Salary/ benefits</u>	<u>Total*</u>
Motorcycle touring	\$0	\$18,165	\$18,165

Tourism as Business Recruitment: Expanding the Economic Impact of Tourism

Introduction

ITRR has always shown the impact of visitor spending in Montana as the economic impact of tourism to the state. These are the direct dollars from nonresidents that impact our economy. However, there could be more to that story beyond the actual visit. For instance, in an article written more than two decades ago regarding the greater Yellowstone ecosystem titled, "Travel Stimulated Entrepreneurial Migration," the authors found that many new businesses were established after the owner had first visited the area. One of the main points of the literature was to point out that the economic impact of tourism should not just be expressed in terms of the impacts of their expenditures. Sometimes they come back and stay. In a 2015 ITRR study of residents, we found that about half the people sampled had lived in Montana all their lives. The other half moved here, and of those, 13.2% vacationed here, then moved to MT and 4.6% had a seasonal job here then moved to MT. Further, of those who had originally visited and later moved to Montana, 6.5% own a business in Montana (please see http://scholarworks.umt.edu/itrr_pubs/324/ for a list of businesses they started in MT).

This previous work suggests an opportunity to explore some key questions: What asset classes, natural amenities, transportation, education, medical, etc., are there that enhance the draw and keep people and their businesses in MT? What is the relationship between the distance between the asset location, and the community's location. In other words, how close to an airport must a community be to benefit from in-migrating entrepreneurs? Amenities may bring in the tourists, but what else is there besides amenities to keep them here as permanent residents? If retirement age, what are the medical resources like? If entrepreneurs, is there access to markets via airports, roads, broadband? What is the education of the workforce? Housing affordability?

Purpose and Objectives

The purpose of this study is to unveil the additional benefits that tourism brings to the state beyond the direct spending of the visitor. Ultimately the question is: How can smaller towns in Montana leverage the tourism/amenity draw?

Methods

This would require a multi-method approach to data collection. In discussion with Headwaters Economics, with whom we will collaborate on this project, we came up with four possible populations to survey:

1. Business owners
2. Employees
3. Retirees
4. Economic Development groups

Business owners, employees (working residents) and retirees will be intercepted at gas stations and rest areas around the state utilizing our statewide surveyors to collect data. This data will be collected on iPads. ITRR personnel will meet with Economic development groups around the state in person or by phone to assess their perceptions of tourism's role in bringing business to the state of Montana. Following survey completion and economic development group discussions, ITRR will draw from secondary data sources to relate the identified findings to the current state/level of socioeconomic conditions (e.g. education) and built assets (e.g. medical facilities) at the geographic scale most appropriate and available.

Outcomes

We hope through analysis of the data we will be able to create a number (likely a range) of the effect tourism and Montana's amenities have in the economy beyond the visitor spending numbers.

1. Reports, press releases, presentations, and website updates will all be part of the information dissemination.

Anticipated Timeframe: July 2018-June 2019

	<u>Operating</u>	<u>Salary/ benefits</u>	<u>Total*</u>
Tourism as Business recruitment: expanding the economic impact	\$7,000	\$19,660	\$26,660

Tourism's Impact on Rural Communities

Introduction

In this last call for research ideas, we heard from a few people interested in small town tourism. Questions such as, "Is travel behavior different for people who visit big towns vs small towns in Montana? Are the travelers who stay in national park gateway communities different than travelers who stay in other small towns? Do we have shorter stays in our town because we are smaller or because we are less touristy?"

We know all towns are different, but are the people who travel and visit small towns different? The ITRR report builder provides interesting results when you compare people who spend a night in towns like Livingston, Big Sky, and Miles City. They are different. The report builder lets us know what those visitors do in Montana (but not in which town) and their attractions to Montana (not the town). Still they are different. What we don't know is the visitor's time and money spent specifically in the small town. To that end, we recommend small towns do a survey kit provided by ITRR. The service includes the design of a survey instrument (using a template with specific adaptations for each community), analysis of the resulting data, and a report. The community must provide volunteers or hire people to collect the data.

Purpose and Objectives

The purpose of this project would be to assist five small communities with their visitor data through conducting the survey kit customized to their community.

Objectives

- To assist communities in understanding their local visitor by waiving the \$700 fee for up to five communities;
- To understand the visitor demographics, trip characteristics, activities, attractions to the community, and planning sources, and;
- To assess the spending patterns of visitors to the community.

Methods

The first five communities that 'apply' to be part of this project would be the study communities. Data would be collected by volunteer or paid (by the community) personnel. ITRR would work with each community to establish the best methodology (sampling days and sample locations). In addition, ITRR would train the surveyors via phone on proper techniques of intercept surveying. The goal for each community will be to intercept 400 visitors during the sampling period. ITRR would input the data, clean, analyze and write a report.

Outcomes

Each community would receive a report on their visitor study. Havre did a survey kit as a community and can be seen here https://scholarworks.umt.edu/itrr_pubs/207/ for a community report example. This understanding of the visitor to each individual community in the study will allow the community to customize their marketing to their visitor. Since these will be community-specific case studies, it should be clear that the results will not be generalizable to other MT communities of the same size.

Anticipated Timeframe: July 2018-June 2019

	<u>Operating</u>	<u>Salary/ benefits</u>	<u>Total</u>
Tourism's impact on rural communities	\$500	\$6,660	\$7,160

Community Tourism Development Case Study – Gardiner (after development)

Purpose and Objectives

The purpose of this study is to understand the effects of infrastructure development on the image and perceptions of a community by both residents and visitors and the change in economic impact to a community after the development is completed. The BEFORE part of the study was completed and can be found at:

http://scholarworks.umt.edu/itrr_pubs/119/ and http://scholarworks.umt.edu/itrr_pubs/118/ and http://scholarworks.umt.edu/itrr_pubs/117/ .

Gardiner was chosen because of the unique nature of the National Park Service and Gardiner improving the entrance to Yellowstone as well as the town's connection to the entrance.

Stage one, conducted in summer 2013, provided the baseline data on resident attitudes toward tourism, resident perceptions of their own community, and image of their community. Nonresidents assessed Gardiner's image, spending in the community, and other visitor characteristics. Stage two would conduct the same research now that the changes in Gardiner have been completed–. Originally proposed for an FY18 project, this did not get suggested for 2017 data collection because improvements were on-going and the centennial celebration might bias the data. Therefore, the request is for FY19.

The Objectives have been:

- To assess the before and after resident attitudes, perceptions and image of Gardiner.
- To assess the before and after image, visitor characteristics and spending patterns by visitors to Gardiner.
- To compare the differences between the before and after variables of both residents and visitors.
- To assess whether infrastructure change affected image by directly asking return visitors to Gardiner and residents who lived there before the change occurred.
- To answer the question: Did the infrastructure change result in a positive or negative impact on residents and visitors?

Methods

Based on the population of the study, two different data collection methods will be used.

Residents: A door-to-door drop off and return pick-up of the survey will be done in Gardiner of all residential properties. This method has proven to provide a significant response rate for data analysis.

Nonresidents: Nonresidents will be intercepted along the sidewalk near the visitor center in Gardiner.

Outcomes

1. Reports, press releases, presentations, and website updates will all be part of the information dissemination.

Anticipated Timeframe: July 2018-June 2019

	<u>Operating</u>	<u>Salary/ benefits</u>	<u>Total*</u>
Gardiner Case study – After Development Assessment	\$8,600	\$18,160	\$26,760

Travel Research Program Projects FY05-FY18

FY18

	<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
1. Quarterly Nonresident Visitor Analysis	\$74,420	\$304,829	\$379,249
2. 2017 Economic Impacts and 2018 Outlook	\$4,900	\$60,629	\$65,529
3. Tourism and Recreation Monitoring	\$10,795	\$17,866	\$28,661
4. ITRR Data Mining	\$0	\$17,866	\$17,866
5. Panel Studies	\$1,000	\$10,964	\$11,964
6. Survey kits	\$0	\$6,414	\$6,414
7. Resident Travel in Montana	\$12,500	\$56,811	\$69,311
8. Montana Tourism Forecasting and Trends	\$2,000	\$65,938	\$67,938
9. Montana's Outfitter and Guide Industry: Businesses and Clients	\$5,500	\$33,479	\$38,979
10. Impact and Characteristics of Mountain Biking: Helena Case Study	\$1,600	\$34,350	\$35,950
Administration	\$20,880	\$28,958	\$49,838
Total	\$133,595	\$638,104	\$771,699

FY17

	<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
Quarterly Nonresident Visitor Analysis	\$85,700	\$329,218	\$414,918
2016 Economic Impacts and 2017 Outlook	\$7,800	\$49,502	\$57,302
Tourism and Recreation Monitoring	\$11,000	\$38,834	\$49,834
Data Mining of ITRR data sets	\$0	\$18,677	\$18,677
Panel Studies	\$0	\$25,396	\$25,396
Survey kit	\$500	\$8,400	\$8,900
Resident Travel in Montana	\$4,052	\$36,064	\$40,116
Visitor Characteristics and Economic Analysis of Northeast Montana	\$8,405	\$43,268	\$51,673
Montana's Key Niche Activities for Visitation & Spending	\$500	\$25,396	\$25,896
Administration	\$25,170	\$52,078	\$77,248
Total	\$143,127	\$626,835	\$769,962

FY16

	<u>Operations*</u>	<u>Salary/benefits</u>	<u>Total</u>
Quarterly Nonresident Visitor Analysis	\$88,600	\$348,747	\$437,347
2016 Outlook and 2015 Economic Impacts	\$7,850	\$44,240	\$52,090
Monitoring of Tourism & Recreation in MT	\$8,700	\$13,225	\$21,925
Data Mining of ITRR data sets	\$0	\$16,951	\$16,951
Panel studies	\$26,500	\$16,951	\$43,451
Survey kits	\$2,250	\$6,124	\$8,374
Assessing Character of Place to Guide Geotourism and the Main Street Montana Project: A case study of two communities	\$3,130	\$26,924	\$30,054
Testing the impacts of Glacier Park bicycling on statewide tourism – current and future projections	\$2,250	\$26,924	\$29,174
Trends and Community Benefits of Tourism as Assessed through an Analysis of Resort Tax Collections and Usage	\$0	\$27,289	\$27,289
Administration	<u>\$20,822</u>	<u>\$38,002</u>	<u>\$58,824</u>

TOTAL	\$160,102	\$565,377	\$725,479
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FY15

	<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
Quarterly Nonresident Visitor Analysis	\$92,382	\$308,407	\$400,789
2015 Outlook and 2014 Economic Impacts	\$8,243	\$32,340	\$40,583
Monitoring of Tourism & Recreation in MT	\$1,173	\$12,379	\$13,552
Economic impacts on Counties and Regions	\$5,865	\$28,549	\$34,414
Data Mining of ITRR data sets	\$2,765	\$19,961	\$22,726
Panel studies	\$22,765	\$25,693	\$48,458
Resource Library	\$0	\$22,360	\$22,360
Administration	<u>\$5,276</u>	<u>\$47,242</u>	<u>\$52,517</u>
Total	\$138,469	\$496,931	\$635,400

FY14

	<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
2013 Economic Impacts and 2014 Outlook	\$7,000	\$46,839	\$53,839
Tourism and Recreation Monitoring	\$10,200	\$45,338	\$55,538
Data Mining of ITRR data sets	\$0	\$22,428	\$22,428
Quarterly Nonresident Visitor Analysis	\$90,200	\$364,375	\$454,575
Characteristics of Bicycle Tourism	\$0	\$9,668	\$9,668
Community Tourism Development Case Study – Before and After	\$9,500	\$29,097	\$38,597
Panel Studies	\$16,500	\$38,280	\$54,780
Survey kit	\$150	\$6,380	\$6,530
Administration	<u>\$16,702</u>	<u>\$54,804</u>	<u>\$71,506</u>
Total Approved	\$150,252	\$596,914	\$767,461

FY13

Approved	<u>Operating</u>	<u>Salary/ Benefits</u>	<u>Total</u>
2012 Economic Impacts and 2013 Outlook	\$400	\$38,510	\$38,910
Tourism and Recreation Monitoring	\$16,800	\$20,370	\$37,170
Data Mining of ITRR data sets	\$0	\$30,000	\$30,000
Quarterly Nonresident Visitor Study	\$79,000	\$162,500	\$241,500
MT tourism job analysis	\$8,000	\$48,200	\$56,200
Economic impact of the Beartooth Highway*	\$52,330	\$86,875	\$139,205
Connection between wildlands and nonresident visitors	\$0	\$10,435	\$10,435
Economic impact by counties	\$3,000	\$11,300	\$14,300
Case studies: impact of small town hotels on rural MT	<u>\$5,940</u>	<u>\$41,200</u>	<u>\$47,140</u>
Total Projects	\$165,470	\$449,390	\$614,860
Administration	<u>\$24,430</u>	<u>\$18,140</u>	<u>\$42,570</u>
Total Project and Admin. Budget	\$189,900	\$467,430	\$657,430

*\$50,000 approved by TAC. Remaining provided by Friends of the Beartooth

FY12

	<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
2011 Economic Impacts and 2012 Outlook	\$400	\$33,380	\$33,780
Monitoring Tourism and Recreation	\$14,050	\$18,640	\$32,690
Data Mining of ITRR data sets	\$0	\$31,610	\$31,610
Quarterly Nonresident Visitor Analysis	\$53,375	\$175,540	\$228,915
Geotourists in shoulder and winter seasons	\$0	\$14,760	\$14,760
Geotourism mapguides – do they work?	\$1,000	\$23,000	\$24,000
Resident in-state vacation characteristics	\$3,875	\$38,300	\$42,175
Why do Nonresidents fly into airports outside of Montana?	\$0	\$10,900	\$10,900
Total Projects	\$72,700	\$346,130	\$418,830
Administration	\$24,130	\$32,910	\$57,040
Total Possible Project and Admin. Budget	\$96,830	\$379,040	\$475,870

FY11

	<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
2010 Economic Impacts and 2011 Outlook	\$3,300	\$22,000	\$25,300
Monitoring Tourism in Montana & Beyond	\$11,920	\$30,000	\$41,920
Data Mining of ITRR data sets	\$0	\$13,540	\$13,540
Quarterly Nonresident Visitor Analysis	\$46,910	\$216,835	\$263,745
Montana Accommodations: Establishing a Visitation Reporting System	\$1,000	\$23,405	\$24,405
Elected officials Attitudes Toward MT Tourism Charter	1,020	\$5,000	\$6,020
Literature Review on the Effects of Climate Change on Tourism	\$0	\$2,600	\$2,600
Total Project	<u>\$64,150</u>	<u>313,380</u>	<u>377,530</u>
Administration	\$22,980	\$28,300	\$51,280
Total Project and Admin. Budget	87,130	341,680	428,810

FY10

	<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
Outlook and Economic Impacts	\$4,270	\$22,715	\$26,985
Monitoring Tourism in Montana & Beyond	\$28,850	\$30,180	\$59,030
Data Mining of ITRR data sets	\$125	\$10,922	\$11,047
Quarterly Nonresident Visitor Analysis	\$35,024	\$212,156	\$247,180
Geotourism -A Statewide Analysis	\$4,052	\$27,324	\$31,376
Economic Impact of the MT Alpine Ski Industry	\$2,750	\$25,511	\$28,261
Total Project	<u>\$75,071</u>	<u>\$328,808</u>	<u>\$403,879</u>
Administration	\$35,000	\$28,370	\$63,370
Total Possible Project and Admin. Budget	\$110,071	\$357,178	\$467,249

FY09

	<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
Outlook and Economic Impacts	\$3,550	\$21,810	\$25,360
Monitoring Tourism in Montana	\$31,850	\$27,240	\$59,090
Data Mining	\$50	\$35,275	\$35,325
Indian Country Visitor and Non-Visitor Analysis	\$11,240	\$41,680	\$52,920
Crown of the Continent Geotourism Evaluation	\$11,500	\$47,405	\$58,905
In-depth Analysis of Montana's vacationers to Glacier and Yellowstone	\$10,730	\$63,530	\$74,260
Q3 nonresident survey	\$2,250	\$28,290	\$30,540
Consumer Show Visitors: Propensity to Visit MT	<u>\$6,850</u>	<u>\$28,100</u>	<u>\$34,950</u>
Total Project	\$78,020	\$293,330	\$371,350
Administration	<u>\$59,730</u>	<u>\$21,810</u>	<u>\$81,540</u>
Total Possible Project and Admin. Budget	\$137,750	\$315,140	\$452,890

FY08

	<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
CTAP – one community	\$2,550	\$10,620	\$13,170
Outlook and Economic Impacts	\$2,490	\$18,372	\$20,862
Monitoring Tourism in Montana (includes interactive website)	\$13,620	\$23,608	\$37,228
Data Mining	\$50	\$11,275	\$11,325
Survey Kit and testing	\$850	\$28,647	\$29,497
Branding Montana	\$86,600	\$25,256	\$111,856
Climate Change and Montana's Tourism and Recreation Industry Region and CVB Advertisement Response and Visitation	\$820	\$14,091	\$14,911
	\$30,220	\$10,185	\$40,405
Total Project	\$137,200	\$142,054	\$279,254
Administration	\$50,600	\$21,289	\$71,889
Project and Admin. Budget	\$187,800	\$163,343	\$351,143

FY07

	<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
Data Mining of Nonresident/Resident Travel and Recreation	\$200	\$60,000	\$60,200
Monitoring Tourism in Montana	\$12,110	\$23,245	\$35,355
Outlook and Economic Impacts	\$2,640	\$17,415	\$20,055
Outfitter/Guide Industry Analysis	\$17,350	\$23,395	\$40,745
Agritourism	\$12,180	\$26,630	\$38,810
Shifting Economy to Amenity Resources	\$2,500	\$20,740	\$23,240
Expectations	\$250	\$9,760	\$10,010
Cultural Tourism Case Study	\$2,750	\$17,610	\$20,360
Total Project	\$49,980	\$198,795	\$248,775
Administration	\$44,600	\$21,275	\$65,875
Total Project and Admin. Budget	\$94,580	\$220,070	\$314,650

FY06

	<u>Operating*</u>	<u>Salary/Benefits</u>	<u>Total</u>
Economic Impacts 2005 and Travel Outlook 2006	\$2,600	\$21,222	\$23,822
2005-06 CTAP and Resident Attitudes	\$9,000	\$29,530	\$38,530
Monitoring Tourism in Montana	\$3,700	\$18,427	\$22,127
2005 Nonresident and Resident Travel and Recreation Survey	\$47,000	\$178,809	\$225,809
Total Project	\$62,300	\$247,988	\$310,288
Administration	\$45,200	\$18,596	\$63,796
Total Project and Admin. Budget	\$107,500	\$266,584	\$374,084

FY05

	<u>Operating*</u>	<u>Salary/Benefits</u>	<u>Total</u>
Travel Outlook and Economic Impacts 2004	\$2,600	\$19,500	\$22,100
2004-05 CTAP and Resident Attitudes	\$5,400	\$29,000	\$34,400
Monitoring Tourism in Montana	\$15,200	\$21,200	\$36,400
Pilot Test: Nonresident and Resident Travel and Recreation Survey	\$2,600	\$12,400	\$15,000
2005 Nonresident and Resident Travel and Recreation Survey	<u>\$36,960</u>	<u>\$147,800</u>	<u>\$184,760</u>
Total Project	\$62,760	\$229,900	\$292,660
Administration	\$54,140	\$17,415	\$71,555
Total Project and Admin. Budget	\$116,900	\$247,315	\$364,215
