

## On-going Research

### **Quarterly Nonresident Visitor Analysis**

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 clients 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.

### **2018 Economic Impacts and 2019 Outlook**

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 other group events around the state.

### **Tourism and Recreation Monitoring**

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.

### **ITRR Data Mining**

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.

## Research Requests

### **1. Economic impact of dude ranching in Montana**

In January we submitted a grant application to MOTBD for our website. We were required to include our contributions to the state's economy. This was difficult since no research has been done regarding guest ranch's contribution to the economy. The ITRR research report on Montana Outfitters and Guides may include statistics from some of our 18 members since a few of them offer guide services for fishing and hunting. However, that's comparing apples to oranges for guest ranch's contributions.

The national Dude Ranch Association collects data on an annual basis. The DRA reports that the average weekly rate at a Montana ranch is \$2434.00. Nine member ranches who participated in the annual DRA survey averaged 297 guests per season. With an average rate of \$2434.00, their economic impact alone would be \$6,506,082.00. Had all nineteen members responded to the survey, economic impact is projected to be, at a minimum, \$13,735,000.00. This industry is a viable part of the overall tourism industry in Montana and accurate numbers would allow everyone to understand its contribution.

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### **2. Economic impact of parks**

--What is the economic impact analysis of a few key parks?

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### **3. Using Tourism to recruit new business**

--Which communities are able to leverage tourism as marketing to recruit entrepreneurs, small businesses, etc?

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#### **4a. Economic impact of fires on Montana**

--What were the economic impacts of this year's fires on Montana's tourism industry?

4b. I would like to suggest a project about the impacts of this year's fire and smoke season to the communities hardest hit by fires as well as the state as a whole due to smoke. Our region was hit pretty hard by both and having some hard data to help show what those direct and indirect impacts were/are would be valuable.

4c. What impacts the decision of where people go when there are fires, or if Yellowstone is full?

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#### **5. Return visitors: what are they looking for?**

##### **5a.**

Specific questions for Stillwater county: Aimed at the 2<sup>nd</sup>, 3<sup>rd</sup>, etc. time visitors to Montana. What are those travelers looking for the second, third, etc. times to our state? Smaller rural communities want to be able to capture tourism revenues as well. We need to understand better what we need to do to attract those visitors.

##### **5b.**

I'd like to see a deeper dive into what repeat visitors want to see and do. Examples:

- History – military, Native, railroad, mining?
- Biking – road, trail, mountain?
- Hiking – backcountry, scenic, ADA assessable?

If we had a better understanding of the repeat visitor, we could better align our product development and regional/local marketing. Do repeat visitors really come back and go to new places? That is our assumption right now.

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#### **6. Are visitors to MT interested in Agritourism activities?**

##### **6a.**

Have you asked any questions of tourists about "agritourism" activities? Have they participated in any? Were they looking for any? What types would they enjoy or maybe have they enjoyed in other areas? I am working with farmers to develop or increase this opportunity. It would help to know if people are looking for this.

##### **6b.**

We've been participating in an agritourism working group for the past year or so. This group includes folks from AERO, MT Dept. of Commerce, MT Dept. of Ag, MSU Extension, the Food and Ag Development Center Network, and the Governor's Office of Economic Development. As a group that is connected to the current and potential supply of agritourism experiences, we'd like to be able to give producers a better sense of what the agritourism opportunity looks like. Within the context of the TAC Research Committee's 'Travel Behavior' theme, **our group is interested in better understanding the demand for agritourism related experience in Montana.**

We would like to know things like:

- Are people searching for agritourism experiences in MT when they are booking their vacations? (Y/N/Don't know what we're talking about)
  - What kinds of agritourism experiences are they looking for? (Farm to table dinners, dude ranch stays, pick your own (full in the blank), farm tours, etc.)
  - Of the people looking for agritourism activities, are they families? Single people? Young or old couples? Are they from certain parts of the country? Any demographic information would be helpful.
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## **7. Tourism and rural communities**

**7a.** My suggestion would be to focus on rural communities, particularly those state-wide that have a majority of public lands on them and how tourism makes/can make an economic impact. ITRR fails to provide adequate sample sizes to small communities with their survey information. It would be beneficial to them to have more/specific data with which to funnel their limited resources. These communities see very little return on their contribution to the bed tax fund – both through the Tourism Region and ITRR. Thank you for your consideration.

### **7b.**

Travel Behavior- I would like to see a breakdown of big towns and small towns. The percentages get muddled with Big Billings and Bozeman and Missoula etc, but we see a different pattern of travelers in Livingston. We have more Canadians, is it because we are on 89? We have shorter stays because we are a smaller city or is it we are less touristy like West Yellowstone. We have more of a calm, natural laid-back demeanor but we are a year-round always something going on community. So small communities have a different type of traveler compared to large cities, and our location associated to the National park has a part of the equation as well. This state has 2 large National parks and there is a difference in the communities that surround them and the ones that don't, as well as the ones with airports and ones without.

Travel Promotion- Again same issue we are a rural community and our analytics show #1 resource locator is desktop and newspaper compared to Missoula for example is very tech savvy and mostly iPad, smart phone etc. All towns in Montana can't be marketed the same way.

Winter travel to our area is different than Bozeman and summer adventure in Livingston is different than Big Sky. The Glacier experience is way different to Yellowstone and you can't have the same experience so why market one way. The USA in 2030 is going to have 38% more seniors yet we are marketing to?

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## **8. Impact of J1V program changes to small communities**

I would like to know the impact changes in the j1V program would have on small communities that rely on these employees. Is there abuse of the program in our markets and the benefits of the program to the individuals from foreign countries and the employers/ staff?

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## **9. Cultural and heritage tourism**

### **9a.**

I would like to suggest exploring in more depth the impact of cultural and heritage tourism. Historic sites, museum, cultural events, festivals, heritage tours, etc. I believe we need to continue to explore the attractions and expectations of visitors (and staycationers) between the national parks. Eg.

Sites: Little Big Horn Battlefield, Butte, tribal sites,

Major museums/attractions (MOR, MHS, CMR, state parks, etc.)

Small town museums: Fort Benton, Sidney, Miles City, Deer Lodge, etc.

Tours: Lewis & Clark, Russell, wild west, etc.

Events/Festivals: Crow Fair, Montana Folk Festival, Russell Auction, etc.

### **9b.**

I would be greatly interested in knowing the number of people who travel to our region because of its history or once here in MT for the recreation, take part in historical events or attractions.

I was so dismayed at the Helena commissioners vote to take down the fountain put up by the daughters of the confederacy in 1916, to honor their grandfathers. The civil war was not started over slavery. Not sure why the Indian council wanted it removed. Think of the fundraising and the effort it took to raise the money for the fountain to honor

those who fought. This is a reaction to confederate statue riot in Charlottesville. We travel to the southeast to tour battlefields and learn about the civil war. We love history and part of the process is learning about what was acceptable behavior at the time. I worry about us erasing history because it doesn't agree with present way of thinking. What other history are we missing or has been condensed to a paragraph so we don't know "the rest of the story"?

**9c.**

Montana is home to numerous Native American tribes that encompass diverse customs and resources. Tourists visiting Montana have highlighted their desire to experience cultural and Native American tourism during their visit. Yet, cultural 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 assess the strengths, weaknesses, opportunities and threats. This research proposes a state-wide needs and opportunity assessment of cultural tourism opportunities from the perspectives of different tribes throughout Montana to inform capacity building and state-wide development of Native American cultural tourism for the state. The research would be conducted in partnership with the Office of Native American Development, the Montana Tourism advisory Council, and representation from each of the Montana tribes.

**9d.**

The development half: Partnerships with the Native Americans should be explored in relation to knowledge and education. There are 7 reservations located in Montana, who are the original occupiers of their perspective areas. Meaning these tribes were not subject to President Jackson's Trail of Tears era, therefore these tribes have an ancestral bond/history to their areas. Would tourist, who come to Montana, want to know what these descendants know and can show them?

**9e**

I am interested in Reservation tourism in general, research that will tell us who, where people want to go and why travelers are visiting. What types of activities are the non resident and resident travelers interested in? What are the demographics of the travelers into Indian Country (Tribal tourism options). Are they looking for planned itineraries or would they prefer suggested sites. Why types of accommodations are they looking for? How are they finding out what is available? What types of transportation are people interested in for tours etc.

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**10. Assessment of Montana as a Sustainable Tourism Destination**

Why: To determine what destinations, businesses, and programs are implementing and communicating about sustainable tourism policies and practices in order to assess the interest in and status of promoting sustainable tourism in Montana

What: Conduct a survey or inventory of existing and planned Montana destination and business sustainability plans, programs and activities, certifications, awards, memberships, and local public and private funding and financial assistance programs, Tourism industry and destination stakeholder knowledge of and interest in sustainable tourism

Utility of Survey Findings: Creation of a baseline assessment that serves as a basis for:

- 1) Developing a Montana Sustainable Tourism Development Plan;
- 2) Outreach, training, and technical assistance of tourism industry and destination stakeholders on sustainable tourism planning and implementation;
- 3) Establishing information resources and best practices library to support outreach, training, and technical assistance of tourism industry and destination stakeholders
- 4) Benchmarking the Montana tourism industry against:
  - Destination and business sustainable tourism certification standards
  - Other state and local destinations to provide a comparison to peers Budget and funding decision making

Definitions of Sustainable Tourism:

“Tourism that maximizes the benefits to local communities, minimizes negative social or environmental impacts, and helps local people conserve fragile cultures and habitats or species.” Center for Responsible Travel

“Tourism that leads to the management of all resources in such a way that economic, social and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity and life support systems.”

– UN World Tourism Organization

References: Sustainable Destination and Business Standards and Certifications

Global Sustainable Tourism Council Criteria for Destinations

Global Sustainable Tourism Council Criteria for Hotels and Tour Operators

TripAdvisor Green Leaders Program

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### **11. Contribution and value of public lands to businesses and counties**

**Is it possible to quantify the value of Montana's public lands to Montana businesses?** This would be especially useful if it could be broken out by geography (e.g. county or region level) and types of land (e.g. BLM, USFS, State Parks).

**What is the economic value of outdoor recreation by county or state region and on a per capita basis in those areas?**

The Outdoor Industry Association has done some of this research, but it has only been at the state level and does not account for indirect economic effects.

**What is the additional economic return realized by linking protected landscapes of public lands?** This question is trying to get at the potential economic benefit of investing in things like rails to trails to connect existing protected landscapes frequented by tourists.

**Can we quantify the additional value of protected land designations (e.g. wilderness, National Parks, State Parks) and the impact that those names and designation have on tourism?**

### **12. Economic value of trails**

**What is the economic value generated by trails and trail systems? For every dollar invested in trail building and maintenance, how much revenue is generated?** It would also be helpful to know the cost of deferred maintenance on trail systems and recreational infrastructure to local communities in terms of lost tourism and recreational revenue.

### **13. Non-motorists trail user willingness to pay for trails**

**Would visitors and recreationists that are using non-motorized recreation (e.g. hiking, mountain biking, horse riding) be willing to pay some kind of additional tax for trail maintenance and how much?** Snowmobilers and ATV enthusiasts currently pay for trail maintenance through their licensing, but non-motorized recreation has no similar mechanism despite the fact that the majority of trail use is not motorized recreation. Non-motorized user groups are currently having discussions about how we could help to support trail maintenance through some kind of opt-in or tax on goods.

### **14. Bike camp case studies – economic impacts**

**In-depth case study of new recreational projects like the Ovando bike camp or the Copper City Bike system to capture the full economic effects of these projects and suggest ways that communities can maximize the economic benefits of these recreation investments.**

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### **15. Montanans' Attitudes Towards Tourism**

While the state, in conjunction with the Institute of Tourism and Recreation Research (ITRR) has previously looked at resident attitudes towards tourism across the state, most recent research has either only asked three-four questions about support for tourism.

The primary objective of this research would be to expand upon this previous work by answering the question of why residents support or oppose tourism development across the state. In addition to keep questions about support for

tourism, additional questions on resident perceptions of the positive and negative impacts of tourism will be asked to see which impacts lead to support and how these relationships vary across the state.

This research plans initially to create a state-wide survey to be administered by mail. The research then intends to use this initial survey to develop an Application Programming Interface (API) that collects and analyzes data at a more consistent level. By creating an agile model we have great potential to make a scalable API that will break through the research discipline's restrictive timeline and data limitations. With the advent of an API to automate the process the state tourism office will be better prepared to manage and develop tourism in a way that residents support and that adds to their quality of life.

Objectives of the study include to generate a scalable approach to analyzing the data that is able to uncover sometimes subtle and complex interrelated socio-cultural, socio-economic and related human emotion themes and sub-themes and develop the foundation of character data aggregation and analysis on a technical level with defined parameters. Ideally the research will (a) reinvigorate ITRR's previous use of resident attitude surveys and (b) put in place systems to measure this important data at a consistent and efficient level to study tourism's impacts on the character of place and quality of life for residents of Montana.

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## **16. Loss of revenue with no sales tax in MT**

**16a.** What is the loss of revenue by not having a sales tax?

### **16b**

States with the "3-legged stool" of taxes (income, property, sales) tend to avoid budget crises like Montana currently is experiencing because the various taxes provide more balance and stability in times of major hiccups with one or two major industries. Even with the downturns in oil/gas and agriculture, if those 11-12 million nonresident tourists (plus MT residents) were paying sales tax on all or most expenditures (except perhaps groceries), the State budget might not be in such a crisis. It would be interesting to see how the State budget picture would look with a 2% or 4% sales tax factored into the mix.

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## **17. VRBO, Airbnb, parking lot camping loss of tax revenue**

### **17a.**

What is the impact on our tourism tax of VRBO, and the impact on Tourism Tax the camping done at Walmart like places and all the rentals done at homes and businesses that don't charge a tourism tax?

### **17b.**

I think some more research on how large of a segment AirBnB / Tourist Home rentals are, and of that, how many are (or are not) collecting state bed tax. There are rough estimates (from 2014) that the state is missing out on \$4 Million + year. [https://www.bozemandailychronicle.com/news/education/the-short-timers/article\\_0a7b4bee-de0e-11e3-a645-0019bb2963f4.html](https://www.bozemandailychronicle.com/news/education/the-short-timers/article_0a7b4bee-de0e-11e3-a645-0019bb2963f4.html)

Given the climate of discussion of sales tax, and the states budget issues and the decrease in funding for tourism, an easy source of revenue would just be enforcing the current laws. I don't think punishing people is the answer, but certainly if they benefit from the work being done to bring tourist to our state, those owners should also help collect tax to fund the system instead of being free riders. So ideas or regulations to help individual city and counties deal with this, or regulation at a state level (currently, each town deals with it differently). The website <https://www.airdna.co/> is very good source of information as well.

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## **18. Revenue loss to MT by people flying in elsewhere**

- What is the loss of income by having travelers fly into outlying states and then driving to Montana? Includes Air Travel, car and RV rental.

## **19. Understanding MT's climate and tourism/recreation impacts**

The Montana Climate Office proposes to collaborate with the Institute for Tourism & Recreation Research to evaluate potential climate impacts on the Montana tourism and recreation industry.

The research would build on the Montana Climate Office's efforts on the recently published 2017 Montana Climate Assessment (MCA). The 2017 MCA focused on agriculture, forests, and water with the Montana Climate Office providing information on historical variability, current trends, and projections of future climate impacts. The MCA utilized stakeholder groups and workshop to identify potential industry impacts. We would propose to use an assessment approach similar to the stakeholder-driven methods utilized for the MCA:

- Engage with individuals and organizations around the state to identify priority topics for the assessment process
- Describe current scientific understanding and uncertainty in ways that are meaningful and useful to decision makers and other stakeholders
- Identify those areas of climate that are strongly related to the current and future health of the Montana tourism and recreation economy
- Align the climate assessment effort in Montana with initiatives underway to support effective and consistent exchange of information
- Enumerate risks related to climate, prioritize risks that require further attention, and establish a process for ensuring that these higher priority risks are managed effectively
- Establish a working relationship with those who represent the tourism and recreation industries that can be leveraged in seeking outside grant support for future research

With sufficient effort, it may be possible to identify coherent adaptation strategies for specific sectors of the tourism and recreation industry in Montana.

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## **20. RV usage in MT**

Two weeks ago I listened to Chris Bornemann, senior manager for the Recreation Vehicle Industry Association, out of Washington DC. In his presentation he stated more RV's have been sold in 2017 since the RV boom of the late 1970s. It would be great to get some data on how many RVs are going into Montana's recreation areas and state parks. This would add support for a new campground in Makoshika State Park and help other recreation areas get support for full hookups etc.

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## **21. Mining vs tourism**

As you know Conservation in and around Livingston is a hot topic in regard to the mines and mining in relation to the river. We however have many mines currently operating and have such for years without incident. My question is...Conservation, no mining, beauty of nature(?) VS. History of Montana in relation to ghost mines, ghost towns, tourism in relation to mining market, History of Butte etc. Current mines in operation, types of mines. When does conservation cross into a path of jobs, state history, tourism related marketing and experiences. I guess everything has two sides and mining is a part to our state we rely on for town economies.

Development- our towns can be small, quaint and desired by many around the world but we need development for the future stability. How do we mix with tourism, how convey the message of historic communities with new development? Is it really where every state might be going because of the millennial movement and gen x travelers? We know what they want but do they really want our towns to change? Would they still want to come and visit? What happens to small town charm?

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## **22. Tourism education in Montana – who is doing it?**

And finally, Measurement- I would love to know how many schools in Montana are teaching about travel in Sociology, tourism in life courses and most of all how many are showing youth of today about how to go into a field of hospitality in the communities where they live or where they come back to. Ask grammar schools, high schools and colleges what tourism is and how many are planning, interested or already involved in its future.

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## **23. The full contribution of bicycling in MT**

Montana sees marked tourism impacts from self-supported bicycle touring, as evidenced in the 2013 ITRR study (Analysis of Touring Cyclists: Impacts, Needs, and Opportunities for Montana). Yet, bicycle tourism is increasingly recognized as a large and multi-faceted arena, encompassing everything from bicycle events (i.e. RATPOD) to destination-based mountain biking (i.e. The Whitefish Trail) to casual cycling (i.e. a family who rents cruiser bikes as a part of their Yellowstone vacation).

Given Montana's reputation as a destination for outdoor recreation, it seems highly likely that Montana's tourism infrastructure is currently seeing impacts from visitors who choose to drive or fly in to the state for bicycling purposes other than were captured in the 2013 ITRR study. What are these impacts? Who are these people? How do we ensure they have the best visitor experience?

Research that focuses specifically on the wide variety of possible bicycle tourism impacts would enable the state to identify previously unknown or under-represented visitor segments – and capitalize on all corners of the growing bicycle tourism economy.

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## **24. Economic and characteristics of alpine skiing in MT**

At the last couple of MSAA meetings, we've talked about the virtues of conducting a follow-up study on the Economic Impact of Downhill Skiing in Montana. Jenny Pelej from MOTBD made the comment at our fall meeting last week that she wanted to figure out why Canadians didn't want to come to Montana in the winter. Though we discussed the obvious economic factors related to the exchange rate, and the fact that they are still one of the major sources of out-of-state visitation to many Montana ski areas, she wasn't sure why they weren't more responsive. However, knowing the state uses their response to advertisements as the key indicator of their success, there may indeed be something in our state's messaging that isn't resonating with our northerly neighbors.

Since our last study was conducted back during the 2009-10 season, during the recession, we thought that it may be worthwhile to do a follow up study. What do you think? MSAA is sitting on a bunch of cash right now, so we definitely have the funds to support a study.

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## **25. Glacier National Park visitors – social media, melting glaciers, Canada**

What are Glacier National Park's emerging visitation drivers? In particular, what role does social media play in visitor decision-making (both if they should come to Glacier, and where in the park they should visit like the North Fork, etc.)? What role does climate change and melting glaciers play in visitor-decision making about when and if to come? How does Canadian National Park promotion impact visitor route planning to Glacier?

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## **26. Connecting Mt's clean water to tourism and outdoor recreation**

Tourism is an industry that promotes infrastructure improvements and sometimes can destroy the natural aspect of a place all together. Water cleanliness is a rarity and Montana has some of the most pristine streams I've come across. Also, in this current time when clean water is such a valuable commodity. The kind of research I would hope would be conducted is the importance of maintaining the cleanliness of our water and keeping our lands from being uprooted and forever destroyed and attracting tourism because of that fact.

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## **27. Impact of 'no housing' for tourism employees and visitors**

I think there should be a study on housing for employees in gateway communities to Yellowstone and other tourist areas.

- How does the lack of employee housing or decent housing, impact the pool of employees available to do the jobs needed?
- Is the substandard housing (or no housing) affecting the type and quality of employees?
- Would there be a new pool of employees who would come to work if they knew nice housing was a possibility?
- Should an employer even supply housing in that if an employee quits or gets fired, they are also then immediately homeless?
- Is it impacting the bottom line of businesses to not have enough qualified employees to fill open positions?
- Is lack of staff or quality staff impacting the visitor experience?
- Would higher wages make a difference with the (lack of) housing problem?

Those are just a few questions, but I'm sure there are other areas related to that. I personally think at some point, lack of affordable, quality housing will impact the bottom line and also the visitor experience. Actually, I think that has already begun in West Yellowstone.

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## **28. Research on room rates vs visitor expectations.**

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## **29. Interest in farm to table food; do people really care?**

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## **30. Promotion to and expectation of mountain bikers**

There seem to be a lot of mountain biking trails developing in the region.... Studies on cycling, how are we targeting these visitors, what are their expectations?

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## **31. Motorcycle touring**

**31a.** Motorcycle guests— profiles of lodging, dining, unique expectations.

### **31b**

This research request is from MOTBD in conjunction with Central, Missouri River Country, and SEMT tourism regions. This research request fits the theme related to *"Travel Behavior in regards to both resident and nonresident activities, destination choice criteria, route choice, outdoor recreation, and perceptions of Montana"* specifically to destination motorcyclists.

Anecdotally, we have observed that motorcyclists are more willing to take rural routes and roads than major interstate highways when available. In fact, Visitor Centers are asked for alternative routes when traveling through Montana or in-route to national parks. Motorcyclists are more willing than other segments to stay in motels, family-owned properties

in lodging with doors that open into parking lots. And, 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.

We are looking for specific data to better understand this market, but do not know if it can be mined from existing non-resident visitor survey information or would need to have a destination motorcyclists specific data gathering project. This psycho-demographic data could include:

- Basic demographics: age, number in traveling party, departure point, specific destination location(s)
- 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?
- Do you have any comments or recommendations that would improve the travel experience for motorcyclists traveling through Montana?

One other option may be to partner with motorcycle-based retail or repair shops using survey in a box. And, also include Visitor Information Centers.

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## **32. Community Tourism Development Case Study – THE After Study**

### **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/](http://scholarworks.umt.edu/itrr_pubs/119/) and [http://scholarworks.umt.edu/itrr\\_pubs/118/](http://scholarworks.umt.edu/itrr_pubs/118/) and [http://scholarworks.umt.edu/itrr\\_pubs/117/](http://scholarworks.umt.edu/itrr_pubs/117/).

Gardiner was chosen because of the unique nature the National Park Service and Gardiner improving the entrance to Yellowstone and 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 as stage one after changes in Gardiner have been complete – probably in 2017. 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 FY18.

### **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.

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### **33. Economic impact of a rails-to-trail across MT**

Rails-to-Trails Conservancy is embarking on a mission to build the Great American Rail-Trail, which will span around 4,000 miles between Washington, D.C. and Washington state. The Great American Rail-Trail will be a multi-use trail available to hikers, bicyclists, and other non-motorized users. Currently, all potential options route the trail through Montana. The Montana portion of the trail would be roughly 300-400 miles and enter the state in or near Yellowstone National Park and exit into Idaho near I-90. The potential Montana portion of the Great American Rail-Trail will be the longest single-state portion, and Montana currently has the least amount complete of any state along the potential routes. The Great American Rail-Trail enters the conversation in Montana at an opportune time, where the state is looking into the creation of a statewide Active Transportation Plan, and numerous trail projects are currently in various levels of completion.

As such, Rails-to-Trails Conservancy would like to understand the potential economic impact of a hypothetical cross-state trail in Montana. Ideally, we'd first like to understand the latent demand for such a trail across Montana (in local trips and longer-distance, touring trips). We'd then like to use that information and apply the spending models of other long-distance trails (such as the Great Allegheny Passage, the Katy Trail, and others), recognizing that Montana provides a different environment than that of other long-distance trails with more rural areas and more distance between towns.

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### **34. Revenue loss due to not reporting sales**

You at ITRR have data on both nonresident and resident spending related to travel and recreation.

Montana's State budget is in dire straits in part because income tax collections are much lower than projected (oil/gas and ag industries likely represent a large share of that). There are many businesses in Montana—including tourism/recreation-related businesses--selling products and services for cash, and not reporting the income.

It would be interesting to compare what residents and nonresidents report to have spent on various goods and services—by county—with the actual commensurate business income reported from each county, to see whether it is possible to assess how much revenue the State is losing due to non-reporting of income by businesses.

Workers who are working “under the table” for cash: employers are not reporting the wages, and workers are not reporting the income (many then also collect public assistance like Medicaid based on “reported” income, leaving less money available for benefits to people who truly need them). How much income tax is being lost by non-reporting workers?

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### **R35: Data Mining: Regional Transportation Analysis: Major Attraction Zone of Influence**

*Short Description:* Determine the communities most influenced by travel to, from, and around the major MT attractions.

*Long Description:* As visitation to Yellowstone and Glacier National Parks continues to increase, opportunities for communities to capture some of the spillover effects increases as well. The degree to which this is realized largely depends on the volume of visitors attracted into or through their community. As should be expected, communities

closer to the major attraction, and on main roadways accessing those sites, receive the largest spillover and those further away receive less. This effect can be thought of as a zone of influence around an attraction. Currently, we do not have a solid picture of this zone. However, the nonresident surveys already collected by ITRR asks respondents a series of questions pertaining to their reasons for traveling to Montana. If on vacation, they are asked to identify their main attractant; most often this is Glacier or Yellowstone. Further, respondents returning the backend survey identify their routes through Montana. By using currently collected data, ITRR can identify the common routes taken through the state and thus the various communities visited (or passed over). This routing information can then be compared to visitor spending to better understand those counties (likely the smallest geographic scale of analysis) that receive high volumes of visitors, who then either also spend money there or simply drive straight through. This provides a landscape view of visitor spending can provide additional insight into how the region is tied together economically.

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### **R36 Website Upgrade**

With the expected completion of the “Montana Tourism Forecasting and Trends” project at the end of FY18, we have the need to create an efficient method of dissemination. This can be completed through enhancement of ITRR’s web interface in conjunction with expanded effort in the annual “tourism and recreation monitoring” budget line. In the short term, this would:

- Enable forecasts to be incorporated into interactive displays (where data warrants).
- Create updated (as data released) visualizations of components previously contained in *The Economic Review of the Travel Industry in Montana* that are not currently on the ITRR website but of utility to users.

In the longer term, this would:

- Create opportunity to increase the interactive data provided to include economic impacts as appropriate
  - Allow users to create “what if” scenarios to identify potential impacts of inputs to forecasts
  - Ultimately, the goal would be to have the ITRR as a one-stop place for all relevant tourism/travel information for Montana. An example website for Hawaii can be seen here: <http://data.uhero.hawaii.edu/#/>
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### **Non-Research: Issues and concerns from the MT tourism industry**

**N1: Winter travel** - perhaps falls under “Travel Behavior” theme - while we know that travelers are drawn to the big ski resorts, winter is always a tough sell for us and there seems to be an anecdotal perception that Montana has arctic temps and mountains of snow all winter, which scares people away. We are eager to explore how to communicate to potential guests that there are areas in Montana (such as our Bitterroot Valley) that have fairly temperate winters and make ideal winter destinations.

Air travel options - I know that there is a group working to bring more carriers and flights to Missoula as has worked so well for Bozeman - we support all research and efforts to increase flight and carrier options to western Montana, making us more accessible both physically and financially.

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### **N2: Over development hurting tourism**

Montana is blessed with stunning views and things to do to see them.. I worry about the over development of our small communities.. traffic, noise, and especially light pollution.. We seem to have an onslaught of billboards and neon lighting in recent years. I know it does not make me want to go there. How I can expect my customers to want to?

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### **N3: Management of public lands**

Number one on your list: Conservation: Unless our National Forest Lands are better managed and thinned, logged, cleared out some, they will continue to be a danger and an eye sore due to the extreme wildfires that consume them every summer. This year was especially bad, as much was lost in our Jewel of the Continent, Glacier National Park, and the fire is still raging there. Here in Mineral County, about 90 % of land is public land, but it was hard hit this year by

wild fire too, and not only is the land decimated, but the smoke in the air rose to the danger level, which slowed or stopped some tourism. Some guests expressed concern.

My idea: the government controls the forests, won't allow private people to do much there, so they as land owners need to maintain and manage the forests much better, as well as all public lands just as we do as private property owners. Better maintenance would bring income to the area, clean things up and prevent these devastating wildfires, so would make our area more attractive to tourists too. Work on this if you can.

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#### **N4. Trip planning**

Breakdown of how people get their tourism information about MT, before they arrive when planning the trip, and once on the road to their destination.

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#### **N5 Lack of workers, recycling, advertising and mine near Emigrant**

As a long time part-time resident and vacation home rental owner in Paradise Valley, here are the questions/problems we are having:

Cannot find enough workers- especially housekeepers and home repair (drywall repair, plumbers, roofers, etc.) There has been a large increase in new homes, resorts, and commercial buildings, which only makes it worse trying to find help in the summer. Wondering if students (trade school/college/grad school, etc.) could shadow/intern with experienced workmen and learn a trade at same time. Our local attorney said he has been trying to retire for years, but can't find a replacement. Law school student internships?

I get this question many times from our vacation guests-- Do we recycle trash? Well, there are a few places around town to put certain types of recycling materials, but one may take paper only, and another (30 miles away) may take plastic and tin only, etc. Wonder if there could be a central place(s) that accepts all types of recycling so we don't have to drive around for hours to recycle. As it is, most don't recycle.

We would always love more advertising about Yellowstone. Most of our guests are from upper mid-west, TX, and CA. Need more advertising in the south and southeast. Would love to see more direct flights from Atlanta, GA (and think that will help get more southern visitors.)

We are very concerned with the proposed mining in Emigrant, MT. I can't even imagine how badly that will affect traffic, views, streams/river, and overall beauty of the area--The Gateway to Yellowstone....

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#### **N6: Spreading the word: Outdoor recreation as economic power**

Many small town businesses have not embraced the outdoor recreation opportunity. A compelling presentation showing business the economic power and potential of outdoor recreation would generate positive energy and business.

Businesses that are at the leading edge of vision will readily react to the outdoor recreation opportunities. Others need a little extra dose of information and maybe some peer pressure to see the path to long-term prosperity outdoor recreation offers.

I'm suggesting an easy to understand presentation that local chambers, community councils, civic clubs, and such could share in small communities. The presentation would make outdoor recreation opportunities apparent and exciting.

The work you do is appreciated and will benefit Montana for decades, thank you.

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### **N7: bike safety concerns with narrow roads**

My idea is for outdoor recreation for the Havre Montana area visitors and also for local residents.

A bike trail is needed from Hwy 87 (the highway from Havre to Great Falls) at the junction of Hwy 87 and Old Post Road (11th Street) into Havre on Old Post Road.

Old Post Road is very narrow, barely able to have white lines visible on the sides of the highway all the way into town. This is a very unsafe stretch of road to ride a bike on. If there were a bike trail there, I do believe residents and visitors would use it.

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### **N8: GPS, signage, license plate counting**

Camping near Little Bighorn National Monument we see an increased need for better GPS searching. Often travelers' GPS systems put them & their Big Rigs out in peoples' pastures or way out of their way. We hear similar comments from those who have traveled statewide. Nothing is more unwelcoming or frustrating than to try to turn those rigs around in tight places.

Most people think we have great state signage & like our lack of billboard clutter which also goes to show the huge trend for following cell phones & internet for directions.

I think we definitely need to keep that trend in mind for future advertising & directions!

Don't forget that travel counts using license plates is not very "true" because of rental vehicles and RV's that are licensed in MT but owners actually live all over the country. It would be nice to offer more retirement (even young retiree) incentives by MT to gain more recreation-minded voters! So many buy their rigs in MT, go to SD to license & get their residency established. We need those people. It could possible even get our census up to gain more federal legislators! It be great to have more federal representation from MT by people who like to recreate.

We also had good comments that despite the smoke there was still plenty of hospitality & people were directed to interesting places & finds. Cudos to everyone across the state! They also learned more about pro-active preventative forest management from this summer experiences.

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### **N9: Incentivizing investments in movies based/shot in MT**

I am a filmmaker who spent 4 months in Virginia City and Nevada City in 2015. Charles Bovey spent his millions to rescue the buildings and these towns from the fire heap. I marveled. I'm sure we all know the story. The Montana Heritage Commission struggles now to keep these towns solvent and the buildings standing on a skeleton staff of 5.

I also fell in love with Montana and make about 6 trips a year to the state. A powerful film can do wonders for a region as far as bringing tourists, etc. I recently attended the "In the Footsteps of John Maclean" held in Missoula last week. It is no secret what that film, A RIVER RUNS THROUGH IT did for Fly Fishing in Montana.

When the film, EAT, PRAY, LOVE was released, tourism went out of the roof in Bali.

I have a film script with the story based in Virginia City and Nevada City where the towns can play themselves. This is important. Many westerns utilize and do shoot in these towns but they play fictional towns. This is not the same type of ADVERTISING. The Towns could be anywhere.

The film script I own also "shows-off" many Montana beauties such as: the Bleu Horses, Roundup, Makoshika State Park, assorted waterfalls, mountains, headframes, dirt roads, livestock, cowboys, rodeos, the Opera House, horses, wide open spaces and much more. My goal is to have this story hit the big screens in America, Europe and Asia and then watch the flood gates open. Tourist dollars in these two struggling towns will be a big boon to their survival.

One way to achieve this goal is through local investors also interested in saving Virginia and Nevada City and promoting Montana.

**Perhaps your research can show investors that Hollywood movies based and shot in Montana can bring the numbers to the state to incentivize their investment.**

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### **N10: Inventories and Information**

1. **Conservation:** When the public reports that they would like more opportunities in public lands, etc- it would be interesting to have a note on things like: Public would like more fishing opportunities- currently in (X) region, 5 state sponsored fishing access sites exist, etc. It's hard to compare relative regions and demand without the baseline numbers. (12 lakes over a certain size, 6 of the lakes have 1 concrete boat ramp, 4 lakes have a marina.) Or, 5 sites exist, and FWP currently has 2 more sites to be online by 2022 in this area.

Filmmakers often look for areas that are free of powerlines and fences, and use public land maps extensively in permitting and planning.

2. **Development:** Often, filmmakers find that the towns and chambers do not have a lot of communication with each other- one town may have a great deal of information on the BLM lands, and another town will be unsure if BLM even has an office in their region. We have been in very small towns where the local hotel did not know what restaurants were open (in a town of 5 restaurants), and the restaurant did not know when the seasonal hotel opened, and neither knew when the local museum opened. Another example is the priority of events- If you ask the gas station attendant what is the largest event to go to in the community and they say the carnival, and the hotel clerk says the rodeo, with the chamber promoting the car show as the big event. It's very frustrating when the smaller towns especially, don't educate well. For the native American community, it would be great to have a good list of artists, how to find them, and verifying the authenticity of the artist, as well as an information contact that is trained to answer the various "lack of knowledge" questions, and knows how to answer back to things like "Do you put the buffalo away at night?".

Filmmakers often spend enormous amounts of time and effort to find local artists, businesses and events and get bounced around to different agencies and numbers and staff because of vacancies, cell phones and lack of coordination.

3. **Measurement:** it's very difficult to extrapolate from the tourism data without baseline information. When the report on tourism behavior says they would like more lodging options in hotels, and there is not a chart or list of what is available in the region, unless the reader is very familiar with the region, the feedback has no relevance. For example, if a tourist in southwestern montana says that they would like more resort options. What defines a resort? How many already exist? If they want more camping options, it's good to know that there are 20 campgrounds in one region vs 3 in another. Do the Glacier visitors have a variety of (10) campgrounds (RV, Tent, KOA), and the Southwestern Montana areas only offer (2) tent camping?

Filmmakers look for concrete numbers on lodging, camping, number of towns, population numbers.

4. **Travel Behavior:** Specifically, what encourages the traveler to leave the interstate? To leave a 2 lane paved road? To use a gravel road? Do scenic trail and byway designations and tourist loops encourage or assist in deciding this behavior? Do signs with amenities offered in the town make a difference in stopping patterns? Does a business advertising it's homemade, locally made beef jerky on the front of the grocery store encourage the visitor to stop? How much time does a visitor spend in communities that have these cues, vs ones that do not. Can we send secret shopper tourists? How does the tourist decide on lodging? If the choice in East Glacier is between a chain hotel and a stand alone one, why would they choose one over the other? Is it easier to

choose a small, owner-operated hotel in a small town over the Holiday Inn? Why? Or, do the chain hotels have the best advantage in larger places like Billings?

What are cues to the traveler in a community that the stores are open? Cues that the stores are safe to enter? The community may know that the Bar/Restaurant/Casino is the best burger in town- how does the traveler find that out?

Filmmakers have the resources and time to spend in a community learning about the hobbies and skills of the community, tourists may not have the same amount of time.

5. **Travel Promotion:** What are the cues to alert the traveler to the community? Apps that alert you to historic sites? Metz, France has a great app that sends an alert when you get near one of their historic sites so you don't pass it by on accident. Can things like the Helena Charm Trail be also a geolocation game, that allows you to collect objects or points via technology? (Pokeman for travelers?) If your favorite cars are Chevrolets, would it be interesting to get an alert as you drive past Lewistown that they have an antique Chevrolet in their museum?

Filmmakers look for unique and interesting pieces about communities. Sometimes they are very specific- looking for Ford cars between the years of 1925 and 1935.

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#### **N11: Request for Custer camp sites**

I see Miles City offers tours of "Camp 21". This tour is an overlook of where Custer's troops camped along the river on their way to "Custer's Last Stand." Because it is agricultural land today, with the main difference is there is now a RR nearby so the tour guides can easily weave a historic tale. They tell local history as they bus you out to the site. This was the 21st of 24 campsites from Mandan to the Little Big Horn. So, I'm thinking he came through Prairie County and Dawson County, camping along the River. Can you pinpoint the other 23 sites or at least those in MT? It is thrilling to see the Little Rosebud battles being promoted locally.

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#### **N12: Need for dump stations**

The new Glendive Town Pump has showers. The new Town Pump is not listed in the phone book yet or even on Google so here is the phone number....377-7500. Showers are 10 dollars for unlimited time. So if we come across someone again looking for a shower in town we can send them to Town Pump. Now if we can just get a dump station that would be great! Why have a new campground if we don't even have a dump station in town. I can't keep sending people to Beach and Miles City.

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