Research Summit, Feb. 21, 2018

Dr. Tom DeLuca

Dr. Norma Nickerson

Dr. Jeremy Sage
ITRR was established 31 years ago (1987) to conduct objective research in tourism and recreation. ITRR is housed in the W.A. Franke College of Forestry and Conservation at The University of Montana-Missoula.

Majority of ITRR funding comes from 2.5% of the statewide bed tax.
ITRR provides citizens, leaders and policy makers with objective tourism and recreation research essential to making informed decisions for advancing Montana’s economy while sustaining its natural resources.

Areas of Research

Economic Impact of Nonresident Travel
Visitor Characteristics and Expenditures
Social and Environmental Impacts of Tourism
Regional and Community Tourism Planning and Development
Niche Market Studies
Outdoor Recreation
Travel and Recreation Yearly Outlook
Why is ITRR housed at the University?
Academic Mind
1. Do I have the right student for the project?
2. What theoretical framework will work?
3. A Ph.D. will need at least 2 years to conduct the study.
4. Best methodological approach to this study is ...

Practitioner Mind
1. Universities have tons of students to choose from.
2. This is applied research...not theory.
3. I need the report in about 2 months.
4. What is the best (or easiest) method to get it done fast?
Academic Mind
5. Write the proposal with budget.
6. IRB (Institutional Review Board) will take about ‘X’ weeks to approve.
7. Send proposal to campus research office and set up as a new project (couple weeks).

Practitioner Mind
5. I know what I want and how much money.
6. Let’s have the board of directors go through the survey instrument.
7. We’re ready. What’s taking you so long?.....
Academic Mind
8. Train student(s)
9. Collect data
10. Clean data
11. Analyze data
12. Write report and send to client
13. Rewrite report to make it less academic.
14. Write it for an academic journal article.

Practitioner Mind
8. Waiting
9. Waiting
10. Waiting
11. Waiting
12. Report is too hard to read and understand…
13. Board reviews report and Ok’s it. Yes!
14. What? You can send our information out to others?
ITRR – Research Lens

• Research Retreat – identify issues
• Annual research requests
• Review and approval by TAC Research Committee and the full TAC
Measurement

- Economic
  - Jobs
    - Seasonal, part/full time
  - Businesses
    - % of community businesses in tourism
  - Public land & contribution
    - USFS, NPS, BLM
  - Economic contribution
    - Hotels, Restaurants, Retail, etc.

- Spending
  - How much on “Made in MT” products?
  - What mementos are purchased?
Promotion

Technology
- Use by visitors
- Expectations of access during trip
- Connecting to communities while traveling

Information Sources
- Arts & Culture
- Spontaneous awareness of what to do
ITRR – Research Lens

- Research Retreat – identify issues
- Annual research requests
- Review and approval by TAC Research Committee and the full TAC
Data Collection: Visitor Surveyor

• Intercepting Nonresidents & MT Residents
  – Intercepted at
    • Gas Stations
    • Airports
    • Rest Areas
  – Nonresidents
    • Demographics, travel behavior, spending, travel routes
  – Residents
    • Questions rotate quarterly
Location of 8 Regional Survey Territories
iPad used to ask up-front questions

Nonresidents:

- 3-5 minutes
- Includes spending
- Ask for participation in follow-up survey
  - Mailback survey
    - Incentive
    - Panel recruitment

Residents:

- 1-2 minutes tops
• Proportion Counts
  – Highway Entry Points
  – Airports
  – Year-round data collection
Challenges

• Changing surveyors
  – Drop everything and find replacement
  – Time intensive to recruit, interview, hire, train

• Schedule Adjustments
  – Weather/road conditions; sick employees
  – Stations out of gas, pump issues
TOOLS
Quarterly data sets

• Data is weighted by entry point and trip purpose.
• Expenditure data is first delimited to 3 standard deviations plus the mean to account for outliers.
• The mean of the delimited expenditure categories gives us the “average daily group expenditure.”
• All data is cleaned and uploaded to the ITRR “Interactive Data set”
Getting the Big $

avg. daily group expenditure (from survey data)
\times
avg. length of stay (from survey data)
\times
total # of groups (from the visitation model)

= estimate of total nonresident travel spending in the state

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Table 1 - 2016 Nonresident Traveler Expenditures\(^1\)

<table>
<thead>
<tr>
<th>Expenditure Category</th>
<th>Average Daily Per Group(^2,3)</th>
<th>Allocation by Category</th>
<th>Total Expenditures(^2,4)</th>
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</thead>
<tbody>
<tr>
<td>Gasoline, Diesel</td>
<td>$27.07</td>
<td>21%</td>
<td>$636,200,000</td>
</tr>
<tr>
<td>Restaurant, Bar</td>
<td>$25.95</td>
<td>20%</td>
<td>$606,430,000</td>
</tr>
<tr>
<td>Hotel, Motel</td>
<td>$17.66</td>
<td>14%</td>
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</tr>
<tr>
<td>Retail sales</td>
<td>$13.48</td>
<td>10%</td>
<td>$315,620,000</td>
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<tr>
<td>Outfitter, Guide</td>
<td>$11.61</td>
<td>9%</td>
<td>$262,390,000</td>
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<tr>
<td>Groceries, Snacks</td>
<td>$10.13</td>
<td>8%</td>
<td>$238,150,000</td>
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<tr>
<td>Licenses, Entrance Fees</td>
<td>$9.37</td>
<td>7%</td>
<td>$203,980,000</td>
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<tr>
<td>Auto Rental</td>
<td>$4.03</td>
<td>3%</td>
<td>$92,690,000</td>
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<tr>
<td>Rental cabin, Condo</td>
<td>$3.88</td>
<td>3%</td>
<td>$88,560,000</td>
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<tr>
<td>Made in MT</td>
<td>$3.01</td>
<td>2%</td>
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<tr>
<td>Campground, RV Park</td>
<td>$1.58</td>
<td>1%</td>
<td>$37,740,000</td>
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<tr>
<td>Vehicle Repairs</td>
<td>$1.44</td>
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<td>Misc. Services</td>
<td>$0.82</td>
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</tbody>
</table>

**Estimated Total** $130.83 $3,035,850,000
Spending is not the end of the story. These dollars spent flow through the State’s economy.

<table>
<thead>
<tr>
<th>Expenditure Category</th>
<th>Average Daily Per Group</th>
<th>Allocation by Category</th>
<th>Total Expenditures²,4</th>
</tr>
</thead>
<tbody>
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Estimated Total: $130,83  $3,035,850,000

<table>
<thead>
<tr>
<th>2016 Economic Impact</th>
<th>Direct</th>
<th>Indirect</th>
<th>Induced</th>
<th>Combined</th>
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<tbody>
<tr>
<td>Industry Output</td>
<td>$2,508,160,000</td>
<td>$802,020,000</td>
<td>$877,420,000</td>
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<tr>
<td>Employment (# of jobs)</td>
<td>34,670</td>
<td>5,670</td>
<td>7,320</td>
<td>47,660</td>
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<tr>
<td>Employee Compensation</td>
<td>$797,480,000</td>
<td>$178,560,000</td>
<td>$233,820,000</td>
<td>$1,209,860,000</td>
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<tr>
<td>Proprietor Income</td>
<td>$106,470,000</td>
<td>$46,790,000</td>
<td>$38,040,000</td>
<td>$191,300,000</td>
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<tr>
<td>Other Property Type Income</td>
<td>$294,390,000</td>
<td>$148,410,000</td>
<td>$160,080,000</td>
<td>$602,880,000</td>
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<tr>
<td>State &amp; Local Taxes</td>
<td></td>
<td></td>
<td></td>
<td>$180,700,000</td>
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</table>
What is Economic Impact Modeling?

- A technique that allows us to trace spending through an economy and measure the cumulative effects of that spending.

Why Conduct Economic Impact Modeling?

- Need is typically triggered by:
  - Large economic events,
  - Catastrophes
  - Changes in government policy
  - Desire to justify funding or demonstrate importance
Tools: IMPLAN

The Model behind the analysis is Input-Output (I-O)

- Permits the examination of inter-industry relationships within an economy.
- Captures all monetary market transactions between industries in a given time period.

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**Estimated Total**: $130.83, $3,035,850,000
Tools: IMPLAN

Key Concepts:
• Impacts: Direct, Indirect, Induced
• Industry Output
• Employment (# of jobs)
• Employee Compensation
• Proprietor Income
• Other Property Type Income
• State and Local Taxes
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Direct Impact (effect)
The set of expenditures applied to the predictive model for impact analysis.
Key Concepts:
• Impacts: Direct, Indirect, Induced
• Industry Output
• Employment (# of jobs)
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• State and Local Taxes

Indirect Impact (effect)
The impact of local industries buying goods and services from other local industries. The cycle of spending works its way backward through the supply chain until all money leaks from the local economy.
Key Concepts:
- Impacts: Direct, Indirect, Induced
- Industry Output
- Employment (# of jobs)
- Employee Compensation
- Proprietor Income
- Other Property Type Income
- State and Local Taxes

Induced Impact (effect)
The response by an economy to an initial change that occurs through re-spending of income received. This money is recirculated through the household spending patterns causing further local economic activity.
Key Concepts:
• Impacts: Direct, Indirect, Induced
• Industry Output
• Employment (# of jobs)
• Employee Compensation
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Industry Output
Output represents the value of industry production in producer prices. For manufacturers this would be sales plus/minus change in inventory. For service sectors production = sales. For Retail and wholesale trade, output = gross margin and not gross sales.
Key Concepts:
• Impacts: Direct, Indirect, Induced
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Employment (# of jobs)
A job is the annual average of monthly jobs in that industry (this is the same definition used by BLS, and BEA nationally). Thus, 1 job lasting 12 months = 2 jobs lasting 6 months each. A job can be either full-time or part-time.
Key Concepts:

- Impacts: Direct, Indirect, Induced
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Employee Compensation

The total payroll cost of the employee paid by the employer. This includes wage and salary, all benefits (e.g., health, retirement) and payroll taxes (both sides of social security, unemployment taxes, etc.)
**Key Concepts:**
- Impacts: Direct, Indirect, Induced
- Industry Output
- Employment (# of jobs)
- Employee Compensation
- **Proprietor Income**
- Other Property Type Income
- State and Local Taxes

**Proprietor Income**
Consists of payments received by self-employed individuals and unincorporated business owners.

**Tools:**
- IMPLAN
Key Concepts:
• Impacts: Direct, Indirect, Induced
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• Employment (# of jobs)
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Other Property Type Income
Represents Gross Operating Surplus minus Proprietor Income. OPTI includes consumption of fixed capital, corporate profits, and business current transfer payments (net).
Key Concepts:
- Impacts: Direct, Indirect, Induced
- Industry Output
- Employment (# of jobs)
- Employee Compensation
- Proprietor Income
- Other Property Type Income
- State and Local Taxes

State and Local Taxes
Estimates taxes paid to all state and local units of government in the study area.
Models only work as well as the data you put into them.

Data Sources?
Tools: Data Sources

Primary Data Sources

Web-Based Panels

Email Lists

Opt-Ins

Qualtrics

Target Populations
Tools: Data Sources

- Secondary Data Sources
- US Government agencies
  - NPS, USFS
  - Commerce - BEA
  - DOT-BTS
  - US Census
  - DOL-BLS
Tools: Data Sources

- Secondary Data Sources
- State Government
  - MDT, ITD, WYDOT
  - FWP
  - Commerce
Tools: GPS/GIS
### Tools: GPS/GIS

1’s and 0’s are not readily useful, but....

<table>
<thead>
<tr>
<th>Name</th>
<th>X</th>
<th>Y</th>
<th>S_86162</th>
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<th>S_79018</th>
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Yellowstone visitors move about the state:

-Visitor Flows - 2015
Tools: GPS/GIS
Tools: GPS/GIS
Survey Kits for communities
## Survey Kit Results:
### Example Comparisons

<table>
<thead>
<tr>
<th>Project</th>
<th>Year</th>
<th>Type</th>
<th>Community</th>
<th>Sample Size</th>
<th>Average Group Size</th>
<th>% of out of county respondents</th>
<th>Average Number of Nights in Community</th>
<th>Average Reported Total Group Expenditure</th>
</tr>
</thead>
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<tr>
<td>Missoula Marathon</td>
<td>2007</td>
<td>Web</td>
<td>Missoula</td>
<td>417</td>
<td>2.75</td>
<td>48%</td>
<td>3.06</td>
<td>$211,021.35</td>
</tr>
<tr>
<td>Missoula Marathon</td>
<td>2010</td>
<td>Web</td>
<td>Missoula</td>
<td>1,521</td>
<td>3.82</td>
<td>70%</td>
<td>2.51</td>
<td>$1,036,323.72</td>
</tr>
<tr>
<td>Montana Folk Festival</td>
<td>2016</td>
<td>Paper</td>
<td>Butte</td>
<td>488</td>
<td>2.64</td>
<td>60%</td>
<td>3.24</td>
<td>$52,682.00</td>
</tr>
<tr>
<td>The Event at Rebecca Farm</td>
<td>2016</td>
<td>Paper</td>
<td>Kalispell</td>
<td>479</td>
<td>2.37</td>
<td>63%</td>
<td>5.29</td>
<td>$330,806.00</td>
</tr>
<tr>
<td>Dragon Boat Festival</td>
<td>2016</td>
<td>Mixed</td>
<td>Kalispell</td>
<td>479</td>
<td>2.47</td>
<td>60%</td>
<td>2.42</td>
<td>$131,773.00</td>
</tr>
<tr>
<td>Pond Hockey Classic</td>
<td>2017</td>
<td>Paper</td>
<td>Kalispell</td>
<td>351</td>
<td>3.66</td>
<td>61%</td>
<td>3.13</td>
<td>$135,936.00</td>
</tr>
<tr>
<td>Spartan Race</td>
<td>2017</td>
<td>Paper</td>
<td>Kalispell</td>
<td>359</td>
<td>2.77</td>
<td>89%</td>
<td>1.99</td>
<td>$157,174</td>
</tr>
<tr>
<td>Montana Folk Festival</td>
<td>2017</td>
<td>Paper</td>
<td>Butte</td>
<td>459</td>
<td>2.17</td>
<td>66%</td>
<td>2.89</td>
<td>$63,361</td>
</tr>
</tbody>
</table>
What it all means

• The survey kit can give valuable information about who is coming to events, festivals, races, and communities and the details of their trip.
• The survey kit provides spending information and comparisons.
Niche Market Studies

Examples:
• Gardiner image
• Geotourism
• Agritourism
• Alpine skiing
• Touring cyclists
• Outfitting & Guiding
SUMMARY - Social Research for Tourism

- Spending & Economic impacts
- Routes and overnights
- Activities
- Social-psychological data
- Visitor Niche markets
- Resident perception of tourism
- Resident travel & recreation
Interactive Data

Nonresident Report Data

- Nonresident Report Data

Travel Trends

Most of the data for these travel trends are made available through secondary sources which are referenced on the individual report pages. All efforts have been made to accurately update data as it becomes available. Some data are distributed more frequently (monthly) than others (yearly). The recent month or year of data may not be available if the publishing organization has yet to distribute it. This is a work in progress. If you suspect a glitch in our program, contact us immediately at itrr@cfrc.umt.edu so the problem can be addressed. Also, please send all of your questions and feedback to the same email address. Thank you for your help.

Choose a Report:

- Airport Deboarding
- Amtrak Ridership
- National Park System Visitations
- Nonresident Expenditures
- Nonresident Expenditures by Location
- Nonresident Visitation
- Resident Attitudes Towards Tourism
- Skier Visits
- 4% Bed Tax Revenue
Someone who wanted to expand their central Montana B&B marketing reach:

Request:
I am looking for all research data you have on Tourism to Montana. Specifically, data on people visiting Montana:

• Regarding percentage of Montana Tourism by State (who comes here and why) each year.
• Regarding which World Countries have the most visitors to Montana each year.
• Any other information that might help a Montana business decide where to target their marketing.

Response to our answer:
Thank You for Taking the Time to Help Us!
Request:
I am looking for information on recent tourism for Conrad, MT which is in Pondera County. I am helping write the NEPA/MEPA checklist for a Recreational trails grant program and one thing they request is a tourism report. I was recommended to you by our local Economic development specialist. Any help you could provide is very welcome. To be honest, since I am not sure what exactly I am looking for I am having a hard time searching for it. Thank you for your time.

Response to our answer:
Thank you ever so much! I really appreciate it. This is exactly what I need. I am thankful for your quick response as well. It is people like you that make my job so much simpler. Have a great day and stay warm! 😊
Request:
Increasing numbers of visitors put a lot of dollars into our local economy but add significantly to the need for services from law enforcement, fire and ambulance, search and rescue, and dispatch in our county. This is putting a significant strain on our personnel, our volunteers, and our finances, which falls squarely on the shoulders of local taxpayers, not the visitors creating the additional demand. We lack a county-wide account that is funded by visitors to meet their critical needs. What about the 3% from bed tax that now goes to the general fund?

Response to our answer:
Thank you!
You knew EXACTLY how to respond. These are valuable insights.
Thank you!
Questions?

Please visit: www.itrr.umt.edu