Data-Driven Insights

What has COVID changed? What are the challenges and opportunities?

Most Montanans think tourism is overcrowding the state, survey says

Seeking balance amid Montana's visitation boom

spreading its wings: How BZN became Montana's busiest airport

Supply and demand drives price: Montana feels pinch of national rental car shortage ahead of banner tourism season

Tourists flocking to the U.S. West Give Hotel Bed Tax Revenues a Big Boost

Montana tourism on rebound after steep drop in 2020

Short-term rentals increase in Montana, but so do prices
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Travel, tourism, and allied industries have been some of the hardest hit industries in the U.S. and worldwide.
U.S. Travel Spending vs Montana Travel Spending

Source: U.S. Travel Association and Tourism Economics
Lodging Facility Use Tax Collection (Bed Tax)

2021 Compared to Expected Normal:
Spring = 34% higher
Summer = 24% higher

Source: Montana Department of Commerce
Lodging Facility Use Tax Collection
Quarterly Changes 2020 & 2021

<table>
<thead>
<tr>
<th>Period</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1</td>
<td>-17%</td>
<td>-18%</td>
</tr>
<tr>
<td>Q2</td>
<td>-57%</td>
<td>-53%</td>
</tr>
<tr>
<td>Q3</td>
<td>-16%</td>
<td>-24%</td>
</tr>
<tr>
<td>Q4</td>
<td>-28%</td>
<td>-23%</td>
</tr>
<tr>
<td>Total</td>
<td>-30%</td>
<td>-30%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2021 over 2019</th>
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</thead>
<tbody>
<tr>
<td>ADR –</td>
</tr>
<tr>
<td>MT: +20.5%</td>
</tr>
<tr>
<td>US: -5.8%</td>
</tr>
<tr>
<td>RevPAR –</td>
</tr>
<tr>
<td>MT: +22.9%</td>
</tr>
<tr>
<td>US: -18.4%</td>
</tr>
<tr>
<td>Occupancy –</td>
</tr>
<tr>
<td>MT: +2.0%</td>
</tr>
<tr>
<td>US: -13.4%</td>
</tr>
<tr>
<td>Rooms Avail –</td>
</tr>
<tr>
<td>MT: +0.2%</td>
</tr>
<tr>
<td>US: +0.9%</td>
</tr>
</tbody>
</table>

Source: Montana Department of Commerce & STR (as of 11/21)
Yellowstone Recreation Visits

2021 has set annual visitation record
4,860,242 Recreation Visits

Source: National Park Service
Glacier Recreation Visits

Source: National Park Service

2021 was the 2nd highest total visits (2017)
Nonresident Visitor Spending

2021 Expenditure Allocation by Category

- Gasoline, Diesel: 23%
- Restaurant, Bar: 20%
- Hotel, Motel: 13%
- Outfitter, Guide: 10%
- Groceries, Snacks: 9%
- Retail sales: 8%
- Auto Rental: 5%
- Rental cabin, Condo: 4%
- Made in MT: 3%
- Entrance Fees: 3%
- Farmers Market: 3%
- Gambling: 3%
- Misc. Services: 3%
- Vehicle Repairs: 3%
- Transportation Fares: 3%
- Campground, RV Park: 3%

Source: Institute for Tourism and Recreation Research
Nonresident Visitor Spending

Total Average Daily Group Spending:
2021: $177.46
2019: $152.54

Source: Institute for Tourism and Recreation Research

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Nonresident Visitors

Total visitor numbers recovered to near 2019 levels

Source: Institute for Tourism and Recreation Research
Nonresident Visitors

Source: Institute for Tourism and Recreation Research

Group volume exceeded 2019
Length of Stay was nearly a full night more than 2019
2021 Total Nonresident Travel Spending in MT

$5.15 billion  47,800+ jobs

Source: Institute for Tourism and Recreation Research
## Montana Tourism & Recreation – 2022 Outlook

**Question:** Looking to 2022, how concerned are you about the following, as they may impact your business/agency:

(1) Not at all concerned, (2) Somewhat Concerned, (3) Extremely Concerned

<table>
<thead>
<tr>
<th>Issue</th>
<th>Not at all concerned</th>
<th>Somewhat concerned</th>
<th>Extremely concerned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inflation</td>
<td>16%</td>
<td>43%</td>
<td>41%</td>
</tr>
<tr>
<td>Economic recession</td>
<td>14%</td>
<td>48%</td>
<td>38%</td>
</tr>
<tr>
<td>Supply chain disruptions</td>
<td>18%</td>
<td>41%</td>
<td>41%</td>
</tr>
<tr>
<td>Housing affordability for staff</td>
<td>33%</td>
<td>26%</td>
<td>40%</td>
</tr>
<tr>
<td>Wildland Fire and smoke</td>
<td>27%</td>
<td>43%</td>
<td>30%</td>
</tr>
<tr>
<td>Reduction in out of state customers</td>
<td>32%</td>
<td>35%</td>
<td>34%</td>
</tr>
<tr>
<td>Availability of sufficient seasonal staff</td>
<td>35%</td>
<td>28%</td>
<td>37%</td>
</tr>
<tr>
<td>Surges of new COVID infections</td>
<td>27%</td>
<td>46%</td>
<td>26%</td>
</tr>
<tr>
<td>Housing availability for staff</td>
<td>37%</td>
<td>26%</td>
<td>37%</td>
</tr>
<tr>
<td>Emotional health of staff</td>
<td>32%</td>
<td>42%</td>
<td>25%</td>
</tr>
<tr>
<td>Visitor volume restrictions at National Parks</td>
<td>37%</td>
<td>35%</td>
<td>28%</td>
</tr>
<tr>
<td>Availability of H1B Visas</td>
<td>77%</td>
<td>11%</td>
<td>12%</td>
</tr>
</tbody>
</table>

**Mean:**
- Inflation: 2.25
- Economic recession: 2.24
- Supply chain disruptions: 2.23
- Housing affordability for staff: 2.07
- Wildland Fire and smoke: 2.03
- Reduction in out of state customers: 2.02
- Availability of sufficient seasonal staff: 2.02
- Surges of new COVID infections: 1.99
- Housing availability for staff: 1.99
- Emotional health of staff: 1.93
- Visitor volume restrictions at National Parks: 1.91
- Availability of H1B Visas: 1.34

Source: Institute for Tourism and Recreation Research
Montana Resident Travel and Tourism Perceptions

TRACKING RESIDENT ATTITUDES SINCE 1992

- Do the overall benefits outweigh the negative impacts?
- If tourism increases, quality of life for residents will improve.
- The state is becoming overcrowded because of more tourists.
- As of 2020, questions associated with COVID.

MONTANA TRAVEL REGIONS

- Glacier Country
- Central Montana
- Missouri River Country
- Southeast Montana
- Yellowstone Country
- Southwest Montana
- Montana

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TOURISM AND QUALITY OF LIFE

IF TOURISM INCREASES IN MONTANA, THE OVERALL QUALITY OF LIFE FOR MONTANA RESIDENTS WILL IMPROVE

22%
Decrease in agreement since 2020

32%
Increase in disagreement since 2020
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IF TOURISM INCREASES IN MONTANA, THE OVERALL QUALITY OF LIFE FOR MONTANA RESIDENTS WILL IMPROVE

- Agree
- Disagree

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In recent years, the state is becoming overcrowded because of more tourists.
Additional Perceptions

Residents were given a chance to share any thoughts they had concerning the survey topic. Of those who provided some additional comment, the overwhelming sentiment from respondents was that any perceived overcrowding in the state was also a result of people moving to Montana, not just tourists. Examples of comments from respondents are presented verbatim below.

- **Migration to Montana**
  - “People moving here are the cause of crowding”
  - “Crowding is from people moving in”
  - “Economically, yes - good. Influx moving in is hurting us”

- **Housing**
  - “Cannot find a place to live and people are staying so overcrowding by staying”
  - “Lived for well over twenty years twenty miles out of town. Very concerned for children as they want to purchase a home now and may not be able to do so”
RESIDENT PUBLIC LAND USE

HAVE YOU CAMPED IN MONTANA IN THE PAST 12 MONTHS?

- **Yes**
- **No**

Montana Travel Regions

- Yellowstone
- Glacier
- Central
- Southwest
- Southeast
- Missouri River

36% Visited new public lands

17% Participated in new activities

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PUBLIC LAND MANAGEMENT

DO YOU FEEL PUBLIC LAND MANAGEMENT AGENCIES IN MONTANA ARE SUFFICIENTLY STAFFED?

61%
A majority of respondents felt that public land management agencies in Montana are NOT sufficiently staffed.
NONRESIDENT PUBLIC LAND ACTIVITIES & USES

WHY DID YOU VISIT THESE NEW MONTANA PUBLIC LAND AREAS?

- Wanted to explore new locations: 60%
- Had more time to explore new locations: 40%
- Preferred/usual locations were too crowded: 25%
- Exploring new outdoor areas b/c of limitations/lack of safety indoors due to pandemic: 20%
- Preferred/usual locations had too many regulations; seemed constricting: 15%
- Preferred/usual locations had too few regulations, felt unsafe: 10%

60% visited Montana public lands areas they had not previously been to.
## NONRESIDENT PUBLIC LAND ACTIVITIES & USES

<table>
<thead>
<tr>
<th>Primary activity on MT public lands</th>
<th>Top responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sightseeing</td>
<td>26%</td>
</tr>
<tr>
<td>Walking/hiking</td>
<td>20%</td>
</tr>
<tr>
<td>Relaxing</td>
<td>8%</td>
</tr>
<tr>
<td>Fishing</td>
<td>6%</td>
</tr>
<tr>
<td>Driving for pleasure (on-road/gravel travel)</td>
<td>5%</td>
</tr>
<tr>
<td>Camping (developed sites)</td>
<td>5%</td>
</tr>
<tr>
<td>Wildlife viewing</td>
<td>5%</td>
</tr>
</tbody>
</table>

### Why couldn't you/didn't you participate in the activity or activities on MT public lands?

- Not enough time
- Don't own gear
- Too expensive
- Don't possess knowledge

*Selected responses displayed*

### 22%

Indicated there were public land activities they wanted to participate in, but could not for various reasons.
Survey Kit Overview

• Service for a minimal fee
  – $500 to $800
    • Depends on method used

• Includes:
  – Survey design (based off template)
  – Guidance on collecting the data
  – Data entry and analysis
  – Report on the results
    • Including open-ended comments in an appendix
Survey Kits:
Paper, Tablet, Online/Web-based
Survey Kit Uses

• Potential for smaller areas to do data collection and help with marketing plans and applying for grants

• Buying this information from consultants $$$
Survey Kits: Improving Data Analyses

• In addition to traditional data collection:
  – New data to be integrated
    • Mobile location data
    • Potential estimates of volume of attendees
  – A more robust standard template
    • More options for questions you can include
For all information from the Institute for Tourism and Recreation Research, please see: itrr.umt.edu