

FY24 University Travel Research Program

The legislative appropriated dollars for the Travel Research Program for FY23 was \$1,199,349. The proposed projects for FY24 are listed below, although due to the legislative year, appropriated FY24 funds may not be known until early 2023. The Research Committee of the Tourism Advisory Council (TAC) recommends the ITRR research projects for each fiscal year. The following projects are brought forth to the TAC Research Committee for discussion and approval. Note that after the ongoing projects, there is not enough budget left for all proposed fiscal year projects. Proposed projects are listed, and once the TAC Research Committee votes, the project cost will be scoped with estimated budgets for the December 12, 2022, TAC meeting.

The following of POTENTIAL research projects and costs for FY24:

<u>FY24 Ongoing Projects and Administration Budget</u>	<u>Operations</u>	<u>Salary/Benefits</u>	<u>Total</u>
1. Quarterly Nonresident Travel and Recreation Analysis	\$104,175	\$444,400.74	\$548,576
2. 2022 Economic Impacts and 2023 Outlook	\$5,400	\$55,898.16	\$61,298
3. Tourism and Recreation Monitoring	\$1,000	\$93,616.46	\$94,616
4. ITRR Data Mining	\$0	\$42,718.70	\$42,719
5. Emerging Issues	\$0	\$59,490.30	\$59,490
6. Survey Kits	\$0	\$9,472.03	\$9,472
7. Resident Attitudes	\$1,000	\$29,611.52	\$30,612
8. Data Visualization & Research Collaboration	\$8,000	\$165,784.25	\$173,784
<u>One-time Proposed FY24 Research Projects</u>			
9. Economic, Social, and Infrastructure Impact Tool	\$43,300	\$105,711.25	\$149,011
a) Yellowstone Natural Disaster and Tourism Impacts	\$0	\$0	\$0
b) Short Term Rental Impacts	\$0	\$0	\$0
c) Understanding Stargazing Trail Visitors	\$0	\$0	\$0
d) Understanding Eastern Montana Visitors	\$0	\$0	\$0
e) Visitors to the Crown of the Continent	\$0	\$0	\$0
f) Understanding Montana Meeting and Convention Tourism	\$0	\$0	\$0
g) Montana Agritourism and Recreation Business: 20 Years Later	\$0	\$0	\$0
h) Economic Impacts of New Winter Access to Yellowstone NP	\$0	\$0	\$0
Administration	<u>\$33,200</u>	<u>\$64,065.86</u>	<u>\$97,266</u>
Total	\$196,075	\$1,070,769	\$1,266,844

DRAFT BUDGET

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

Quarterly Nonresident and Resident Visitor Analysis (Ongoing)

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 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. Finally, the purpose is to intercept residents (when nonresidents are unavailable) 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 address 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 online 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 online. This additional data includes activities, sites visited, routes driven, attractions to the state, information sources used, lodging type, and technology use.
- 3) Supplemental surveys: a methodology for niche markets or other research needs will either be on-site interviews, online 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 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 Visitor Analysis	\$104,175	\$ 444,400.74	\$548,576

2023 Economic Impacts and 2024 Outlook (Ongoing)

Purpose and Objectives

The purpose of the study is to estimate annual nonresident visitation to Montana, the economic impact of visitors to Montana, and project visitation for the year 2024. The objective is to get this information out to as many Montanans as possible through Economic Outlook Seminars (9 Montana cities), the 2024 Outlook article, the Governor's Conference on Tourism, and other group events around the state.

Objectives:

- To estimate 2023 visitation through secondary data sources and ITRR nonresident data.
- To project 2024 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 for MT tourism business owners.

Outcomes

The following information will be provided from this project:

1. The Tourism and Recreation Outlook 2024 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 2023 economic and visitation figures, used by tourism related businesses and agencies for planning, will be available in mid-December 2023, and final numbers available in late May 2024.
4. The ITRR website will contain the newly-updated information.

Anticipated Timeframe: On-going

	<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
2023 Economic Impacts and 2024 Outlook	\$5,400	\$ 55,898.16	\$61,298

Tourism and Recreation Monitoring (Ongoing)

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 as it becomes available.
- Continue work with Parks and Outdoor Recreation Division (previously State Parks and Fishing Access Sites), including primary data collection and monitoring of visitation numbers and trends.

Outcomes

1. The interactive web page will be upgraded as needed, and new trend data sets will be updated annually, quarterly or monthly, depending on the data type.
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 internationally.

Anticipated Timeframe: On-going

	<u>Operating</u>	<u>Salary/ Benefits</u>	<u>Total</u>
Tourism and Recreation Monitoring	\$1,000	\$93,616.46	\$94,616

ITRR Data Mining (Ongoing)

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.
- **Additional analysis of niche activities.** Depending on the needs of MTOBD and others, this could be one or numerous reports to look more specifically at activities.

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 on the results will be written as needed.
2. Journal articles will be written and submitted for publication.
3. Presentations on data findings will be provided at conferences and meetings.

Anticipated Timeframe: on-going

	<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
ITRR Data Mining	\$0	\$42,718.70	\$42,719

Panel Studies (Ongoing)

ITRR uses 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 easy way to assess the current climate of travel and recreation. As questions arise in the industry, this method can be used to answer the 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

The panel members 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. MT Expression Research Notes or other reports will be written as needed.
2. Journal articles will be written and submitted for publication.
3. Presentations on data findings will be provided at conferences and meetings.

Anticipated Timeframe: July 2023 – June 2024

	<u>Operating</u>	<u>Salary/ benefits</u>	<u>Total</u>
Panel Studies	\$0	\$59,490.30	\$59,490

Survey Kits (Ongoing)

Purpose and Objectives

The purpose of the survey kit is to assist communities, organizations, or event managers in researching 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 with the event, and spending by visitors.
3. If a total count of participants is obtained, 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	\$9,472.03	\$9,472

Yellowstone Natural Disaster and Tourism Impacts (One-time)*

Introduction

On June 16, 2022, the Yellowstone River experienced severe flooding, impacting the towns of Gardiner, Silver Gate, and Cooke City, with over 10,000 visitors to Yellowstone National Park forced to evacuate. The flood severely impacted the economy and fabric of these communities, with lasting impacts until the road between Gardiner and Mammoth is re-aligned. Little research has been conducted on the ongoing debates regarding the allocation of post-disaster assistance and recovery prospects.

[Montana's silent Yellowstone flood: When tourists leave | Federal Reserve Bank of Minneapolis \(minneapolisfed.org\)](#)

[Yellowstone flood leaves lasting mark on Red Lodge, Montana : NPR](#)

Purpose and Objectives

The purpose of this study is to understand the impacts and recovery efforts in Yellowstone National Park Gateway Communities of Montana.

Objectives:

1. Understanding flood impacts on the tourism economy in affected areas/regions (economic, social, housing, etc.)
2. Gain information on the allocation of post-disaster assistance
3. Examine recovery efforts and effectiveness

Outcomes

Determine the negative impact on visitation and tourism businesses caused by the flooding catastrophe and understand recovery efforts and the perception of residents/business owners. This report will be shared widely across Montana and specifically with FEMA to improve the federal and state recovery efforts for natural disasters. Reports, press releases, presentations, and website updates will all be part of the information dissemination.

Methods

Two distinct methodologies will be used.

1. An on-site community assessment with leaders will be conducted, and the workshop will be facilitated, and recorded, and data analyzed in qualitative software programs such as NVivo.
2. A survey for community members will be delivered to homes and then collected for analysis.

Outcomes

The analysis and description of visitors to Eastern Montana will be written into a report to be used by all MT CVB’s, regions, and other promotional entities. Reports, press releases, presentations, and website updates will all be part of the information dissemination.

Anticipated Timeframe:

<u>Operating</u>	<u>Salary/ benefits</u>	<u>Total*</u>
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Short-Term Rental Impacts (One-time)*

Introduction

One of the top challenges in Montana is long-term workforce housing and affordability. Understanding the impacts of short-term rentals (STRs) and various regulations is a key part of this equation. In 2019 ITRR conducted a study to understand STRs that included visitors and city/county officials, as well as an online travel behavior survey regarding accommodation choices and changes in travel due to the COVID-19 pandemic. Results suggest that positive STR impacts include increased financial well-being for hosts and more vacation rental opportunities for the guests. In some locations, however, STRs appear to limit housing availability and contribute to increased rent and housing costs. This study will further explore how STRs are impacting Montana housing post-pandemic.

[The State of Short-Term Rentals in Montana \(umt.edu\)](http://umt.edu)

Methods

AirDNA datasets for Montana counties will be explored. In particular, we will look at single-family units/similar dwellings that are rented out year-round, that are owner occupied, and that are at least in part utilized as STRs.

Outcomes

This study will explore in greater detail the prevalence of STRs, their types, and availability in different counties in Montana and discuss the potential impacts of STRs on housing. This exploration is intended to be informational only and does not aim to identify the causation of housing affordability.

Anticipated Timeframe:

<u>Operating</u>	<u>Salary/ benefits</u>	<u>Total*</u>
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Understanding Stargazing Trail Visitors (One-time)*

Introduction

Astronomical tourism represents a less-studied segment of sustainable tourism, where a dark night sky is the underlying resource. The best destination in Montana for astronomy enthusiasts is Glacier National Park, stretching into the Waterton-Glacier International Peace Park. These two parks have been certified as an International Dark Sky Park by the International Dark Sky Association (IDA). Both locations host many stargazing events from June through September. In addition, winter is considered the best time for stargazing in Montana due to dark, clear skies and a higher chance to spot elusive Northern Lights, with the Missouri River Country and Yellowstone Country offering stargazing sites and trails.

Purpose and Objectives

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

Objectives

- To gather demographics: age, number in traveling party, departure point, specific destination location(s)
- To assess travel behavior such as:
 - Is your trip planned around a specific site?
 - 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, or 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 stargazing in Montana and what improvements could be made.

Methods

This study will be an online survey and administered to a Qualtrics panel survey.

Outcomes

The analysis and description of stargazers 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 stargazers will assist in possible infrastructure development and site improvements. Understanding the needs and behaviors of star gazing tourism will aid in designing promotion to Montana specifically for this group of visitors.

Anticipated Timeframe:

Operating Salary/ benefits Total*

Understanding Eastern Montana Visitors (One-time)*

Introduction

Eastern Montana has unique outdoor recreation and tourism offerings than Western Montana. To develop infrastructure and increase tourism, it is vital to understand visitors to the Eastern part of the state.

Purpose and Objectives

The purpose of this study is to use existing data and create an overview of Eastern Montana visitors from the past five years.

- To identify demographics and trip characteristics of Eastern MT visitors

- To understand trip planning, travel patterns/timing, lodging, and attitudes of MT visitors
- To estimate in-state and nonresident trip expenditures of Eastern MT visitors

Methods

Data mine current data sets.

Outcomes

The analysis and description of visitors to Eastern Montana will be written into a report to be used by all MT CVB’s, regions, and other promotional entities. Reports, press releases, presentations, and website updates will all be part of the information dissemination.

Anticipated Timeframe:

Operating Salary/ benefits Total*

Visitors to the Crown of the Continent (One-time)

Introduction

This is a repeat research project from 2009. The Crown of the Continent Geotourism Council is a partnership between local, tribal, state, and provincial entities working together in the region that includes and surrounds Waterton-Glacier International Peace Park in southwestern Alberta, southeastern British Columbia, and northwestern Montana. Since the late 2000’s, the Council has printed and distributed millions of Geotourism MapGuides across Montana and two provinces. The last study on visitors to the Crown of the Continent was undertaken by ITRR over ten years ago.

[Geotourism in the Crown of the Co \(umt.edu\)](http://umt.edu)

Purpose and Objectives

This study is being conducted to better understand who visits the Crown of the Continent region and compare it with the previous study.

Methods

Visitors to sites on National Geographic’s Crown of the Continent geotourism mapguide will be intercepted and asked to fill out a survey regarding their travel values during the 2023 summer season. The Crown of the Continent region includes northwest Montana, southwest Alberta, and southeast British Columbia. The northern border of the region is the Crowsnest Pass area of Alberta and the headwaters of the Elk River in British Columbia; the western border consists of the Rocky Mountain trench that flows from the Tobacco Valley of Eureka down through the Flathead Valley and into the Mission Valley to the south; the southern border is the Blackfoot river to its headwaters at Rogers Pass; and the Eastern border is the Alberta and Montana Rocky Mountain Front (Graetz, 2008).

Outcomes

The analysis will be written into a report to be used by all MT CVB’s, regions, and other promotional entities. Reports, press releases, presentations, and website updates will all be part of the information dissemination.

Anticipated Timeframe:

Operating Salary/ benefits Total*

Understanding Montana Meeting and Convention Tourism (One-time)

Introduction

The exhibition, convention & meeting industry is a segment of the business travel sector focusing on expos, corporate events, and gatherings. Meetings volume is projected to exceed 2019 levels in 2024, and by the end of that year, the industry will be at 109.8% of pre-pandemic volume.

Purpose and Objectives

The purpose of this study is to understand the meeting and convention tourism of Montana.

Methods

This study will be conducted by creating an online survey to distribute to Montana meeting and convention centers and other businesses involved in this industry.

Outcomes

The analysis will be written into a report to be used by all MT CVB's, regions, and other promotional entities. Reports, press releases, presentations, and website updates will all be part of the information dissemination.

Anticipated Timeframe:

Operating Salary/ benefits Total*

Montana Agritourism and Recreation Business: 20 Years Later (One-time)

Introduction

Farmers and ranchers have been taking advantage of Montana's growing tourism industry in a relationship that benefits farmers, ranchers, and tourists. In 1997, a study conducted by the Institute for Tourism and Recreation Research investigated a trend in the tourism industry where farms and ranches were partnering with recreation. The 1997 study was the first study conducted by the institute that focused exclusively on agritourism. The topic of agritourism was revisited in 2006 and published in 2007.

[Montana's Agritourism and Recreation Business: Ten Years Later \(umt.edu\)](http://umt.edu)

Purpose and Objectives

The overall purpose of this study is to replicate the study from 2007 and understand agritourism today.

Objectives

- What recreation businesses are currently operated, and what recreation businesses are being planned in the next five years?
- What activities do these farms/ranches currently offer and which are planned?
- Why do farmers/ranchers operate recreation businesses?
- What obstacles do farmers/ranchers see in terms of operating a recreation business?
- How do farmers and ranchers who participate in recreation and tourism businesses see the uses of their land changing in the near future?
- How has agritourism in Montana changed in the last 10 years?

Methods

This study will be conducted by creating an online and mailback survey to distribute to Montana agritourism businesses.

Outcomes

The analysis will be written into a report to be used by all MT CVB's, regions, and other promotional entities. Reports, press releases, presentations, and website updates will all be part of the information dissemination.

Anticipated Timeframe:

Operating Salary/ benefits Total*

**Economic Impacts of New Winter Access to Yellowstone National Park
through the Northeast Entrance of Cooke City Montana**

Emerging Issue

Historically, the North Entrance gateway community of Gardiner, MT has been the only year-round access into Yellowstone National Park as visitors can travel through the North Entrance Gate and on to Cooke City, MT the Northeast Entrance of YNP, however, once individuals reach Cooke City they are unable to travel further because of an 8.5 miles section of road "the plug" that is not plowed. While plowing "the plug" has always been a hot button topic, this year plowing "the plug" seems to be an actual possibility. If "the plug" is plowed the impact this could have on many of the local economies in the Yellowstone Country Tourism Region is completely unknown, it has never been plowed. It would be crucial to have data on the economic impacts plowing "the plug" has on local economies so that, moving forward, there is concrete data on the plowing's economic effects about travel and recreation.

Update: There is a petition to the governor from Cooke City residents asking him to plow the plug. He has stated he has received it, but nothing further beyond that. This may be an emerging issue project.

Anticipated Timeframe:

Operating Salary/ benefits Total*

Travel Research Program Projects FY05-FY23

FY23

	<u>Operations</u>	<u>Salary/Benefits</u>	<u>Total</u>
1. Quarterly Nonresident Travel and Recreation Analysis	\$104,175	\$444,400.74	\$548,576
2. 2022 Economic Impacts and 2023 Outlook	\$5,400	\$55,898.16	\$61,298
3. Tourism and Recreation Monitoring	\$1,000	\$93,616.46	\$94,616
4. ITRR Data Mining	\$0	\$42,718.70	\$42,719
5. Emerging Issues	\$0	\$59,490.30	\$59,490
6. Survey Kits	\$0	\$9,472.03	\$9,472
7. Resident Attitudes	\$1,000	\$29,611.52	\$30,612
8. Data Visualization & Research Collaboration	\$8,000	\$165,784.25	\$173,784
9. Economic, Social, and Infrastructure Impact Tool	\$43,300	\$105,711.25	\$149,011
9.a Trail & Facility Use (2 sites)	\$6,186	\$15,102	\$21,287
9.b Economic and Infrastructure Impacts of events (4 sites)	\$12,371	\$30,203	\$42,575
9.c Economic Impact of Museums (2 sites)	\$6,186	\$15,102	\$21,287
9.d Dispersed Winter Activities (2 sites)	\$6,186	\$15,102	\$21,287
9.e Paleontology Impacts (2 sites)	\$6,186	\$15,102	\$21,287
9.f Indian Country Tourism Research (2 sites)	\$6,186	\$15,102	\$21,287
Administration	<u>\$33,200</u>	<u>\$ 64,065.86</u>	<u>\$97,266</u>
Total	\$196,075	\$1,070,769	\$1,266,844

FY22

	<u>Operations</u>	<u>Salary/Benefits</u>	<u>Total</u>
1. Quarterly Nonresident Travel and Recreation Analysis	\$88,005	\$311,753	\$399,758
2. 2021 Economic Impacts and 2022 Outlook	\$4,700	\$35,983	\$40,683
3. Tourism and Recreation Monitoring	\$1,695	\$47,166	\$48,861
4. ITRR Data Mining	\$0	\$30,537	\$30,537
5. Emerging Issues	\$300	\$37,191	\$37,191
6. Survey Kits	\$0	\$8,128	\$8,128
7. Resident Attitudes	\$500	\$17,685	\$18,185
8. Data Visualization & Research Collaboration	\$0	\$56,832	\$56,832
9. Understanding the New Visitor	\$2,000	\$10,919	\$12,919
10. Understanding Public Land Uses and Abuses	\$2,000	\$10,919	\$12,919
Administration	\$22,755	\$61,429	\$84,184
Total	\$121,955	\$628,542	\$750,497

FY21

	<u>Operations</u>	<u>Salary/Benefits</u>	<u>Total</u>
1. Quarterly Nonresident Travel and Recreation Analysis	\$106,124	\$447,899	\$554,023
2. 2020 Economic Impacts and 2021 Outlook	\$4,700	\$38,177	\$42,877
3. Tourism and Recreation Monitoring	\$5,495	\$68,605	\$74,100
4. ITRR Data Mining	\$0	\$31,957	\$31,957
5. Emerging Issues	\$300	\$25,772	\$26,072
6. Survey Kits	\$2,000	\$8,316	\$10,316
7. Air Service Impacts	\$9,400	\$30,785	\$40,185

8. Negative/Positive Press/Social Media Impacts on Traveler	\$4,000	\$40,995	\$44,995
9. Impact and Usage of Short-term Rentals in Montana	\$2,000	\$21,474	\$23,474
10. Visitor Use Monitoring–Assessing River/State Park Use	\$3,200	\$56,502	\$59,702
11. Projected Impact of Visitation Caps in Glacier NP	\$4,000	\$25,070	\$29,070
12. Bicycling in MT: Supply-Side Review & Demand Profile	\$3,360	\$45,492	\$48,852
13. Residents’ Attitudes toward Tourism and Impact/ Challenge to Community Character	\$4,845	\$17,142	\$21,987
14. Impact of Music Festivals and Concerts	\$5,000	\$22,371	\$27,371
15. Analysis of Montana Museum Visitors	\$1,400	\$23,555	\$24,955
16. Administration	<u>\$21,255</u>	<u>\$68,194</u>	<u>\$89,449</u>
Total	\$177,079	\$972,305	\$1,149,384

FY20

	<u>Operating</u>	<u>Salary/benefit</u>	<u>Total</u>
1. Quarterly Nonresident Travel and Recreation Analysis	\$90,325	\$433,588	\$523,913
2. 2019 Economic Impacts and 2020 Outlook	\$4,700	\$58,453	\$63,153
3. Tourism and Recreation Monitoring	\$11,100	\$18,256	\$29,356
4. ITRR Data Mining	\$0	\$50,915	\$50,915
5. Survey Kits	\$0	\$14,384	\$14,384
6. Emerging Issues	\$0	\$23,318	\$23,318
7. ITRR Interactive Website Upgrade	\$8,950	\$112,270	\$121,220
8. Eastern Montana data growth	\$900	\$30,365	\$31,265
9. Canadian Traveler Analysis	\$500	\$23,318	\$23,818
Administration	<u>\$18,300</u>	<u>\$67,349</u>	<u>\$85,649</u>
Total	\$134,775	\$832,215	\$966,990

FY19

<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
<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

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 2022 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

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	\$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	\$64,150	313,380	377,530
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	\$75,071	\$328,808	\$403,879
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	\$820	\$14,091	\$14,911
Region and CVB Advertisement Response and Visitation	\$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
