

# Data-Driven Insights

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

Montana News

## Most Montanans think tourism is overcrowding the state, survey says

Montana Public Radio | By Kristine de Leon  
Published March 23, 2022 at 6:51 PM MDT



## Seeking balance amid Montana's visitation boom

By Daily Inter Lake  
| March 20, 2022 12:00 AM

## Spreading its wings: How BZN became Montana's busiest airport

By Melissa Loveridge Chronicle Staff Writer | Mar 28, 2021

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

Nolan Lister | May 30, 2021 | 0

Overtourism

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

Lebawit Lily Girma, Skift  
March 10th, 2022 at 9:00 AM EST

## Montana tourism on rebound after steep drop in 2020

David Erickson | Jun 7, 2021 | 0

## Short-term rentals increase in Montana, but so do prices

by Emma Wulffhorst | Monday, November 8th 2021

# Data-Driven Insights



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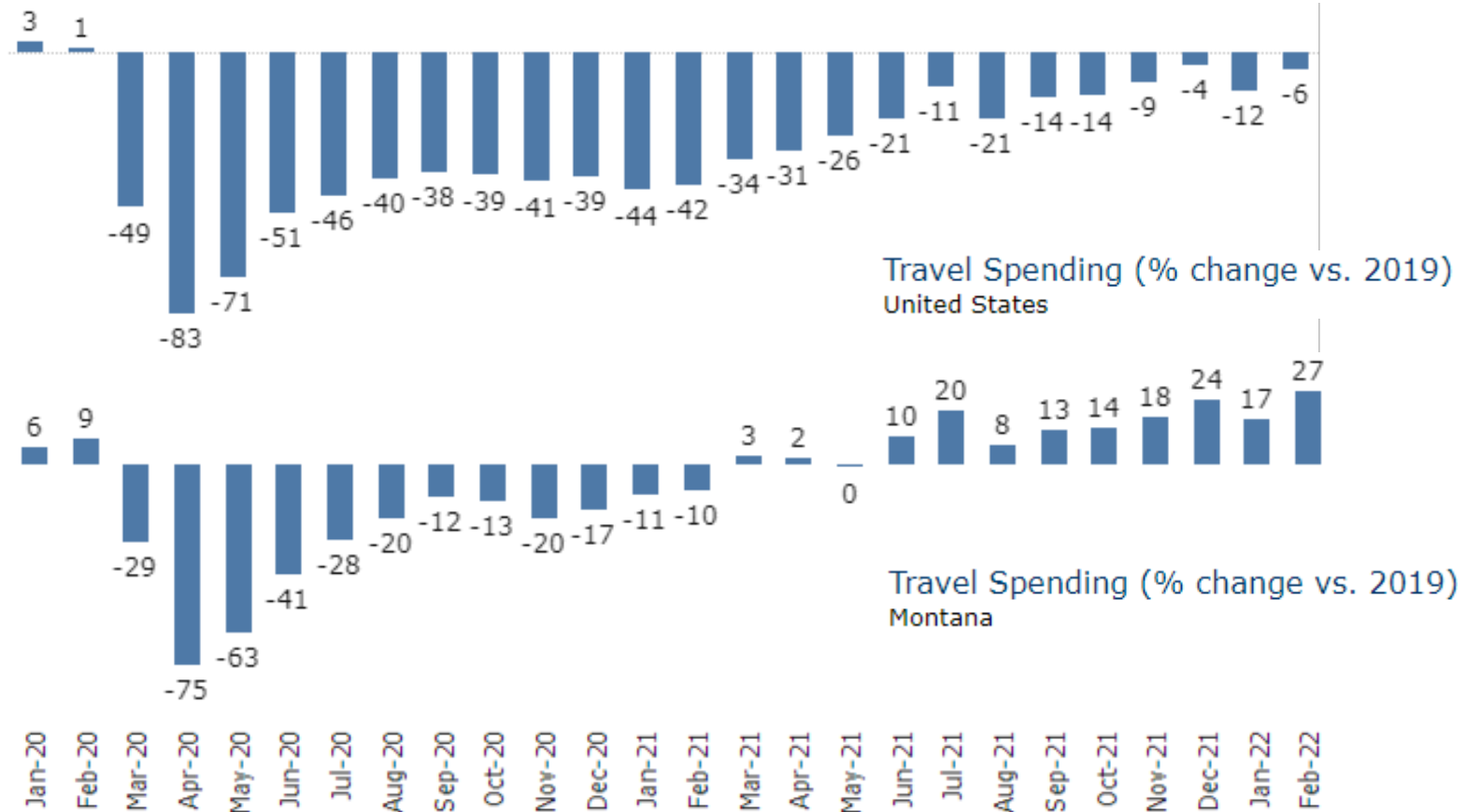


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# U.S. Travel & Hospitality

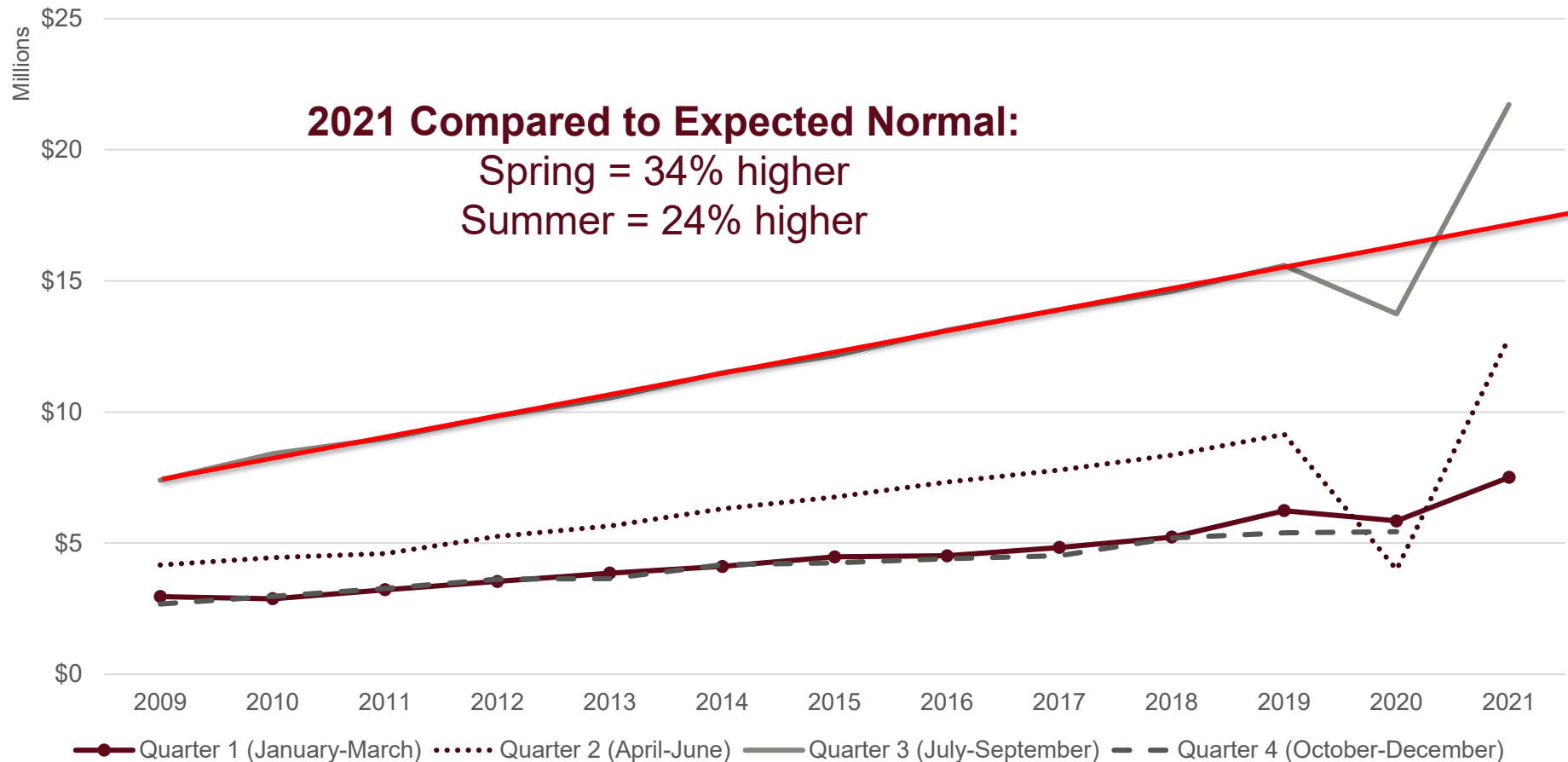
Travel, tourism, and allied industries have been some of the hardest hit industries in the U.S. and worldwide

# U.S. Travel Spending vs Montana Travel Spending



Source: U.S. Travel Association and Tourism Economics

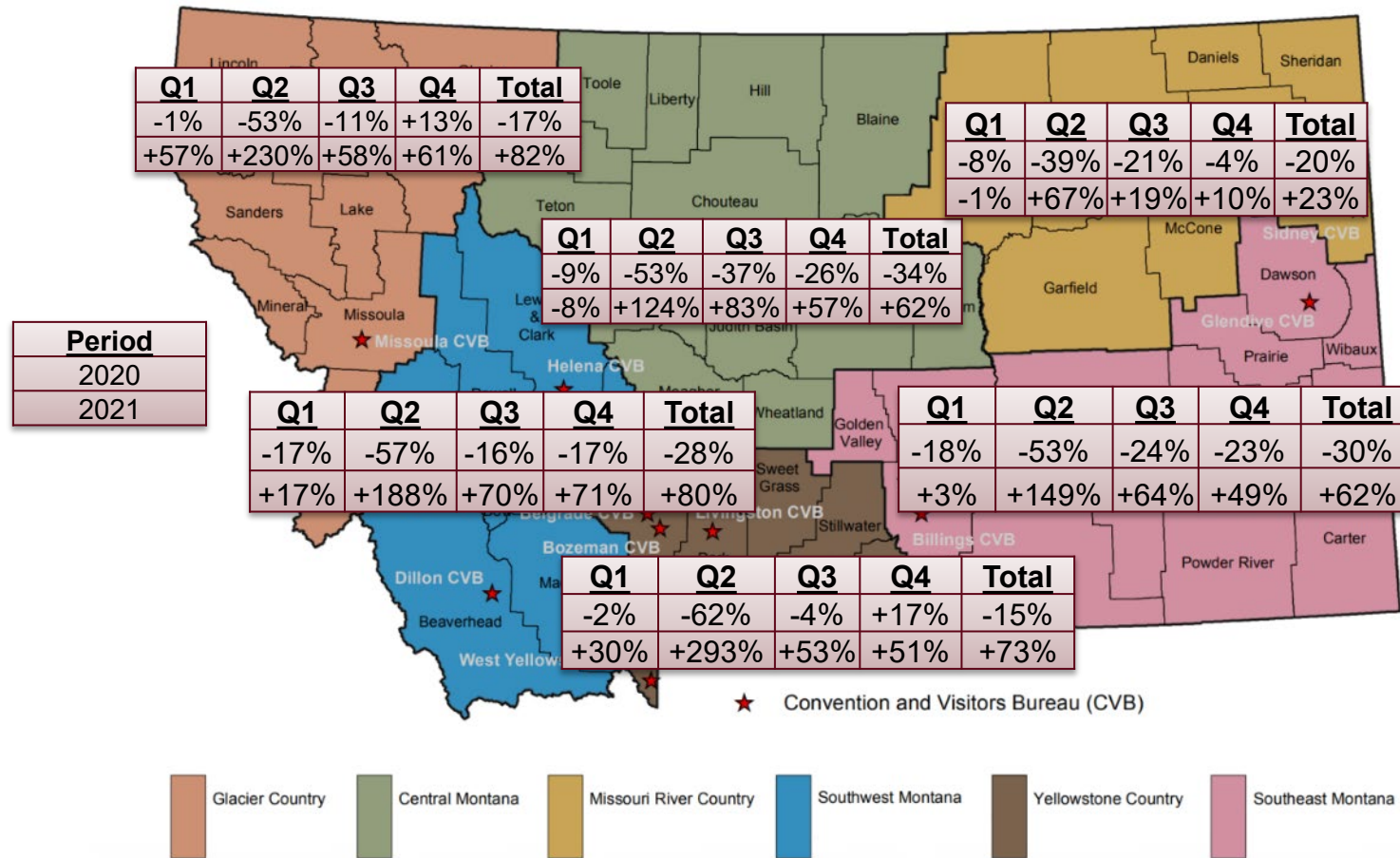
# Lodging Facility Use Tax Collection (Bed Tax)



Source: Montana Department of Commerce

# Lodging Facility Use Tax Collection

## Quarterly Changes 2020 & 2021



### 2021 over 2019

ADR –  
 MT: +20.5%  
 US: -5.8%

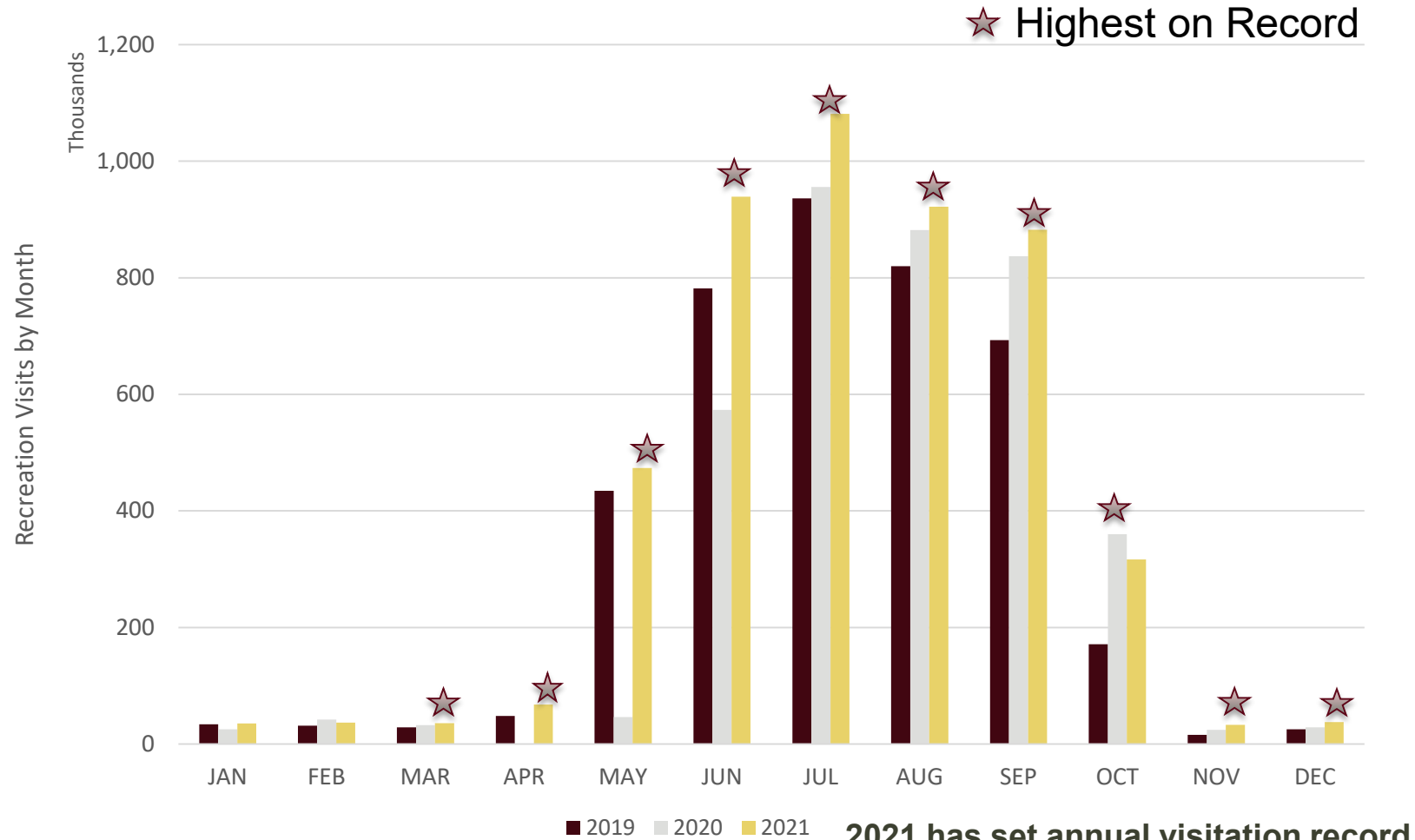
RevPAR --  
 MT: +22.9%  
 US: -18.4%

Occupancy --  
 MT: +2.0%  
 US: -13.4%

Rooms Avail --  
 MT: +0.2%  
 US: +0.9%

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

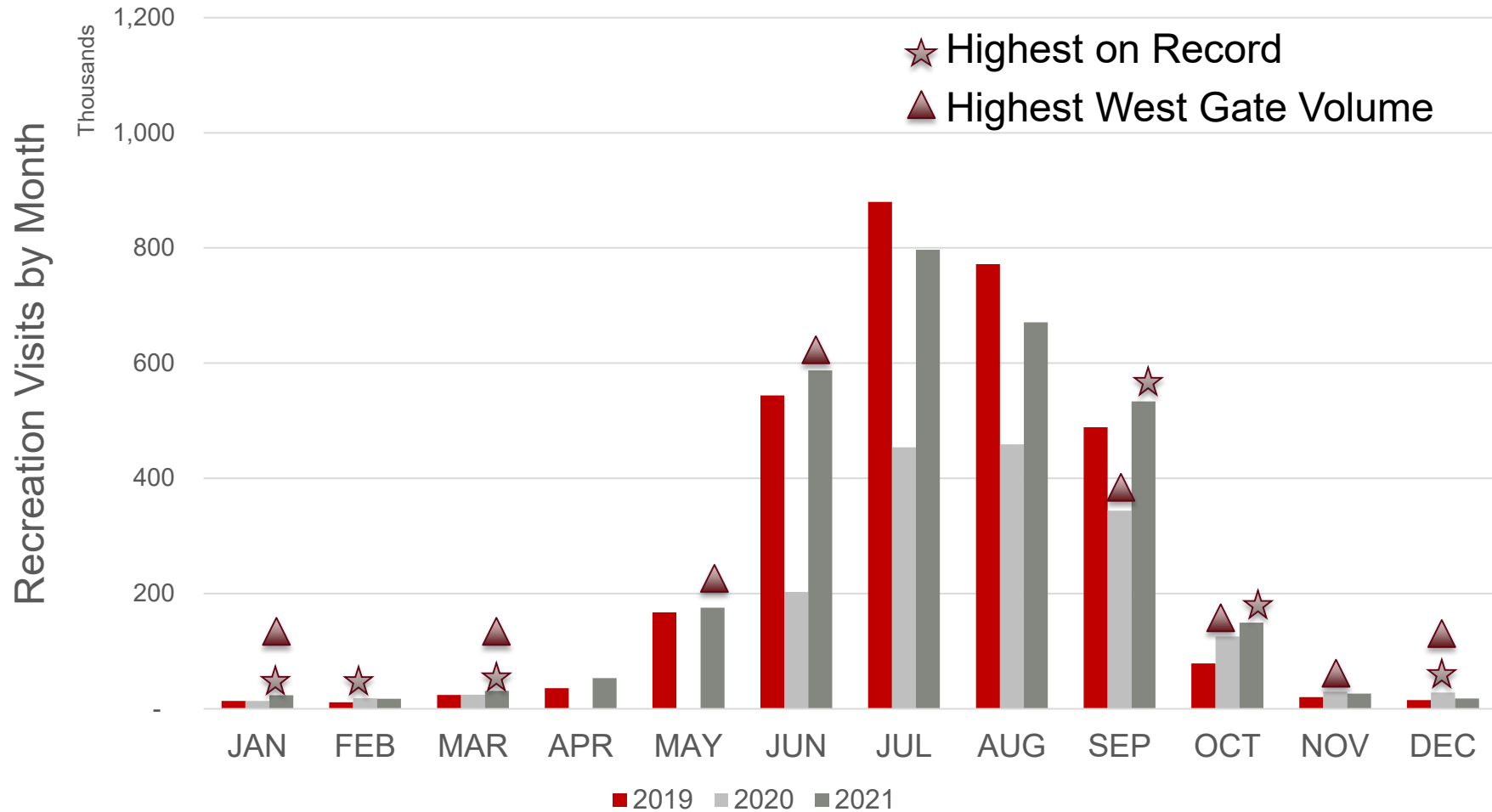
# Yellowstone Recreation Visits



Source: National Park Service

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

# Glacier Recreation Visits



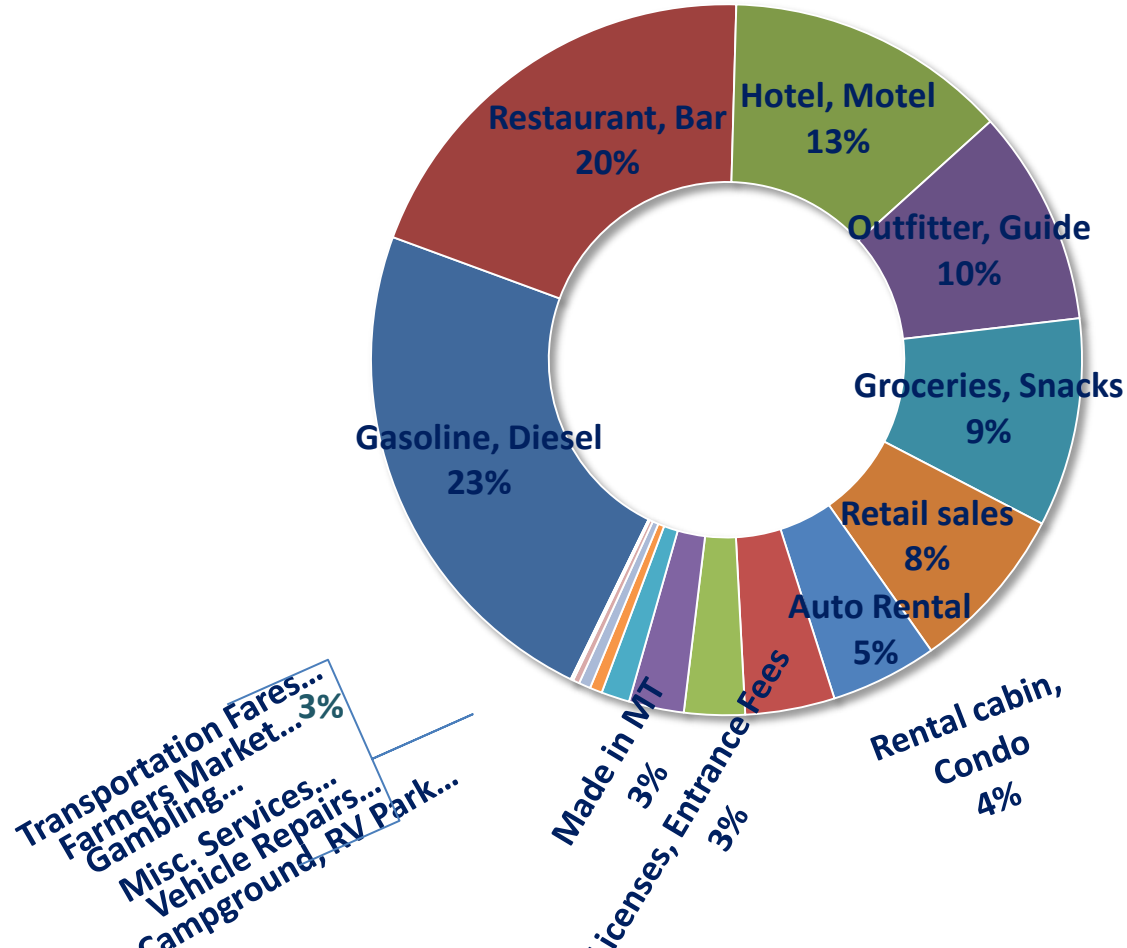
Source: National Park Service

2021 was the 2<sup>nd</sup> highest total visits (2017)



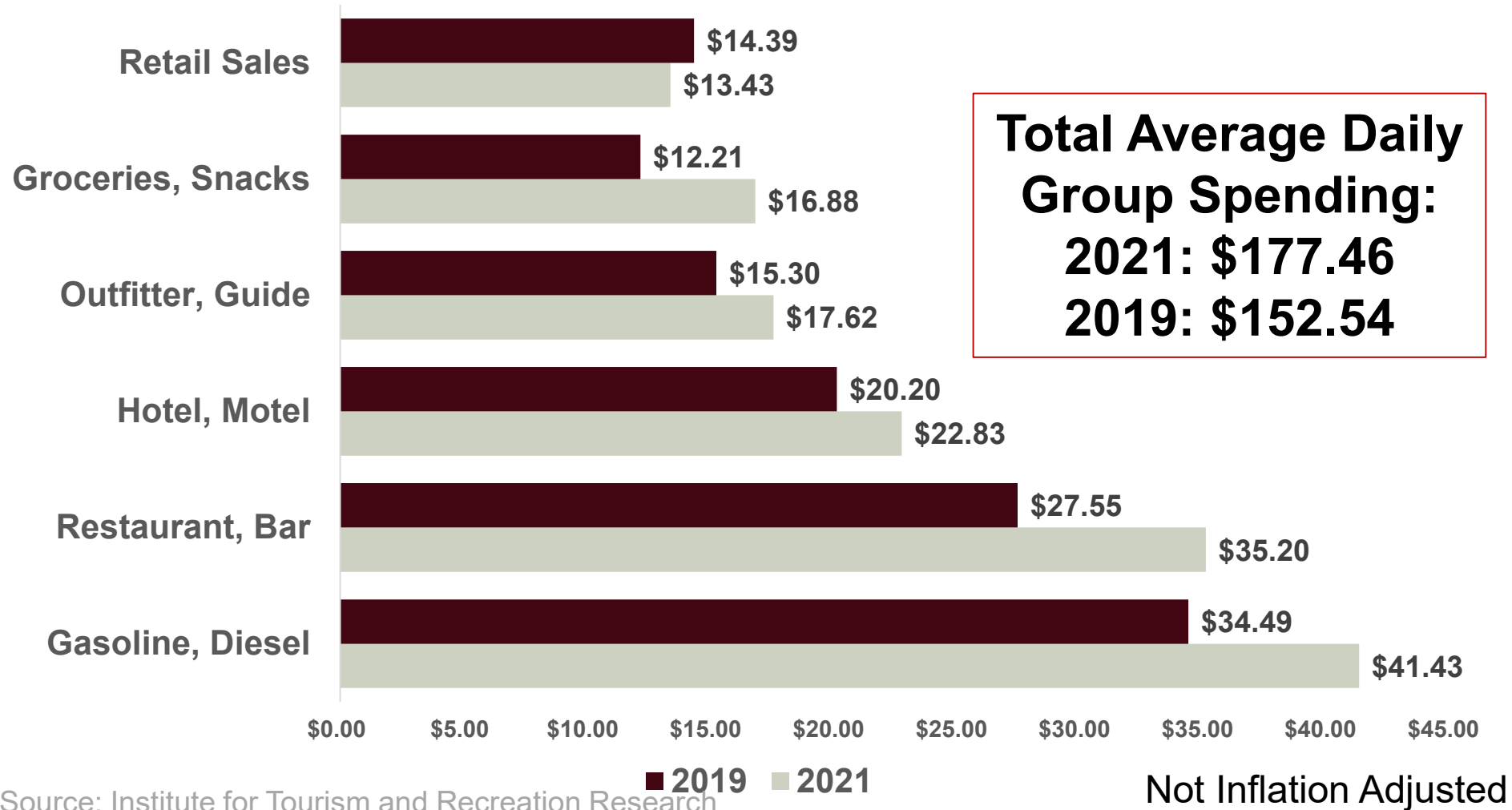
# Nonresident Visitor Spending

## 2021 Expenditure Allocation by Category

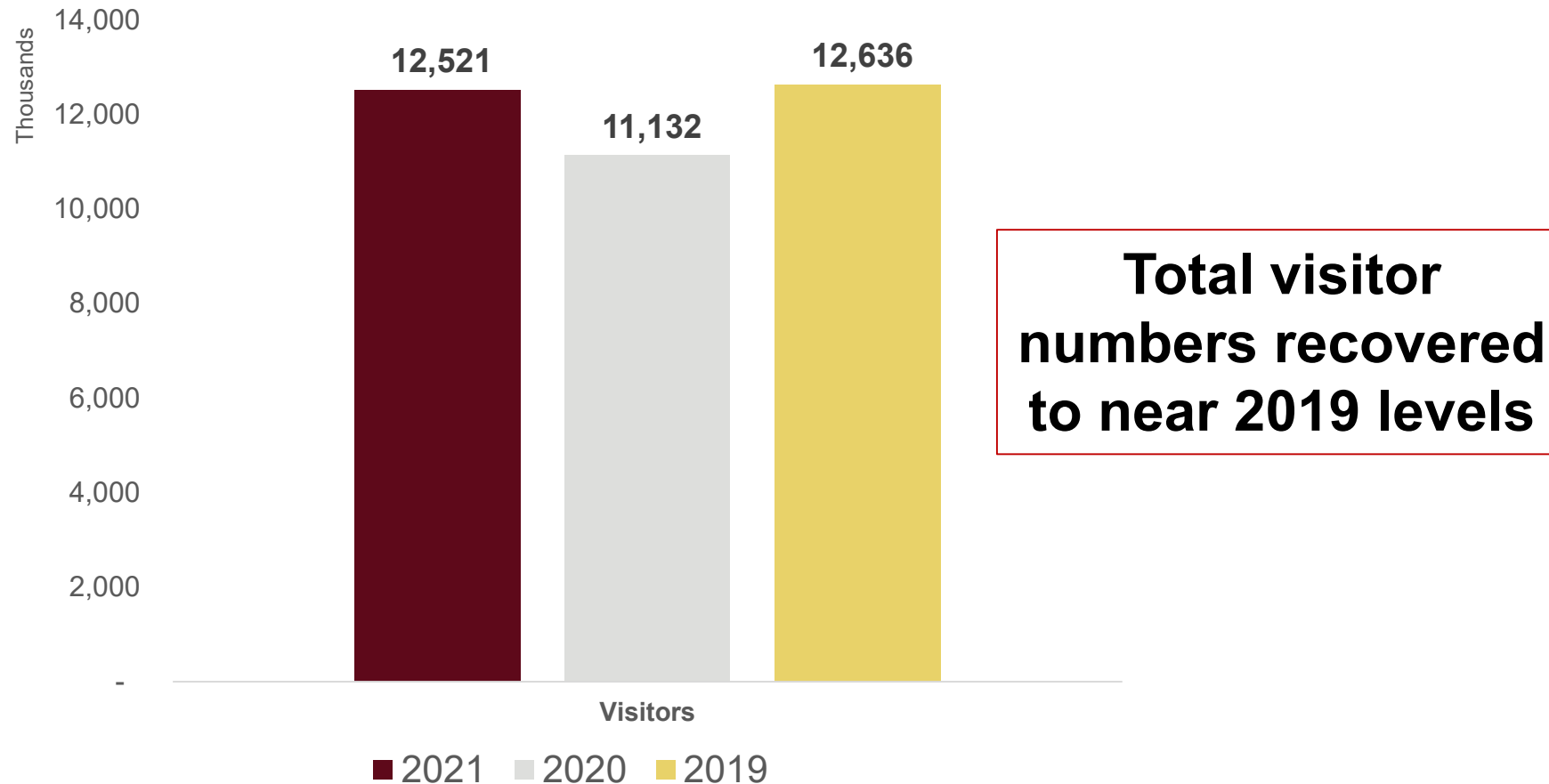


Source: Institute for Tourism and Recreation Research

# Nonresident Visitor Spending

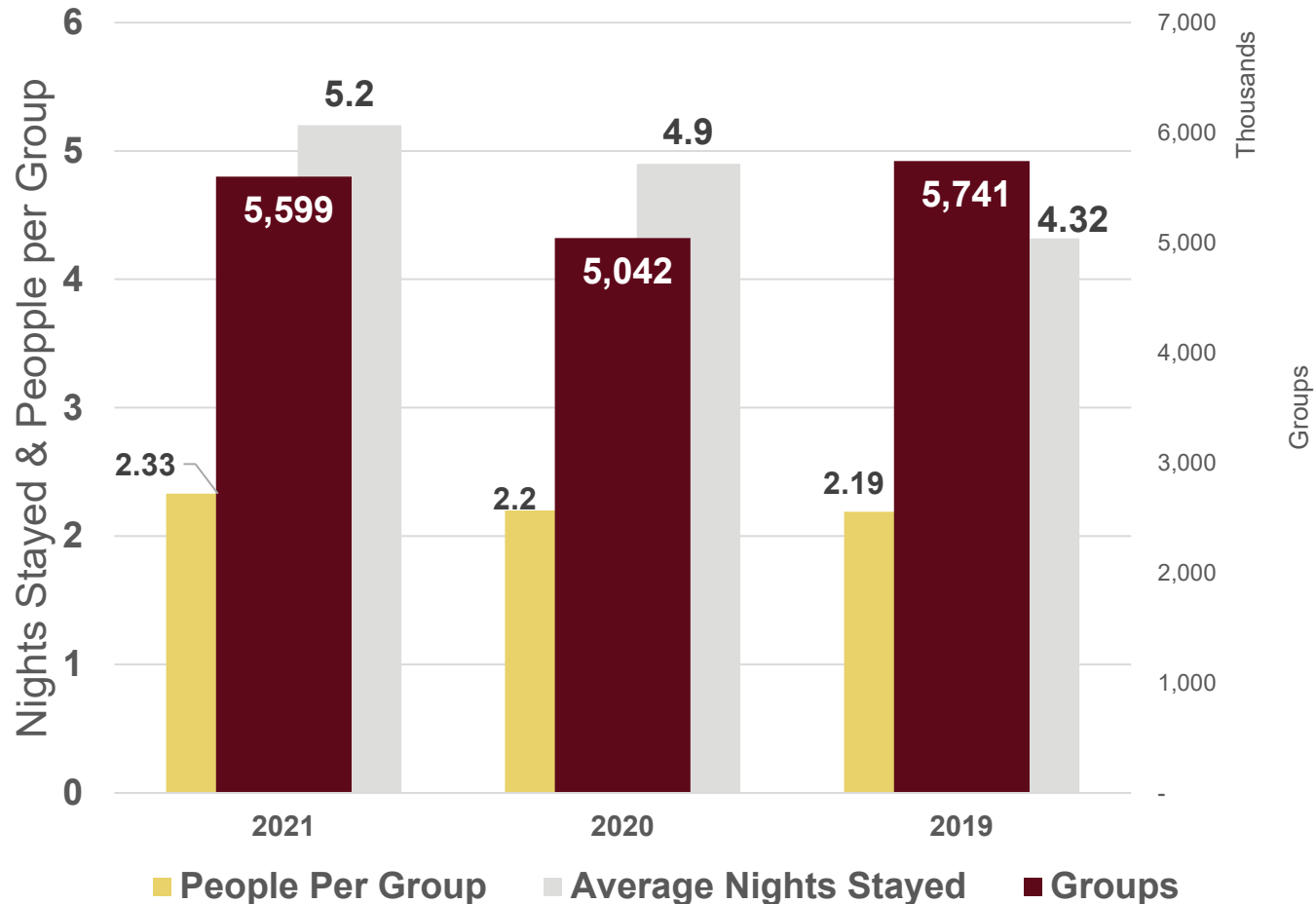


# Nonresident Visitors



Source: Institute for Tourism and Recreation Research

# Nonresident Visitors



**Group volume exceeded 2019**

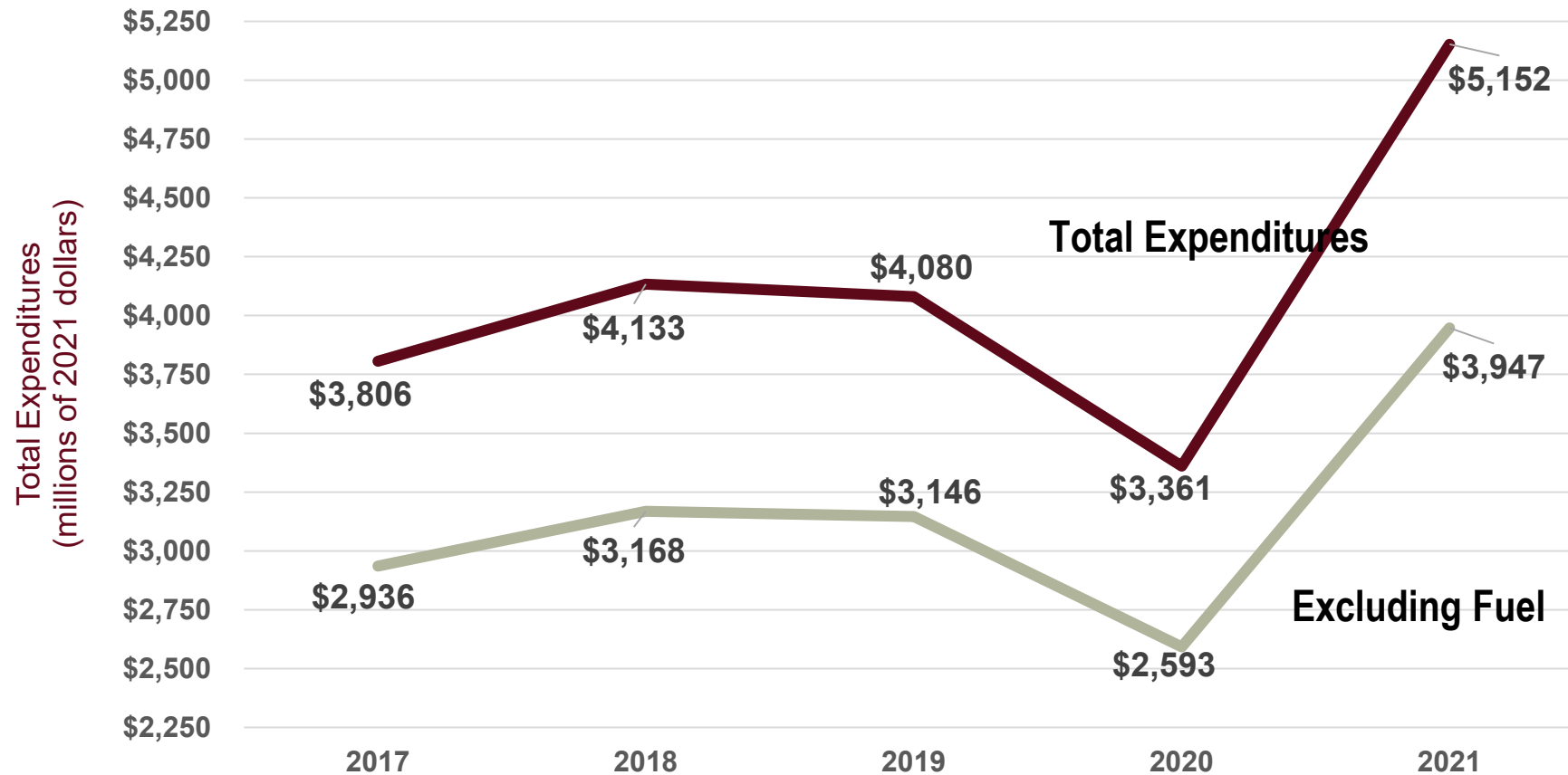
**Length of Stay was nearly a full night more than 2019**

Source: Institute for Tourism and Recreation Research

# 2021 Total Nonresident Travel Spending in MT

**\$5.15 billion**

**47,800+ jobs**

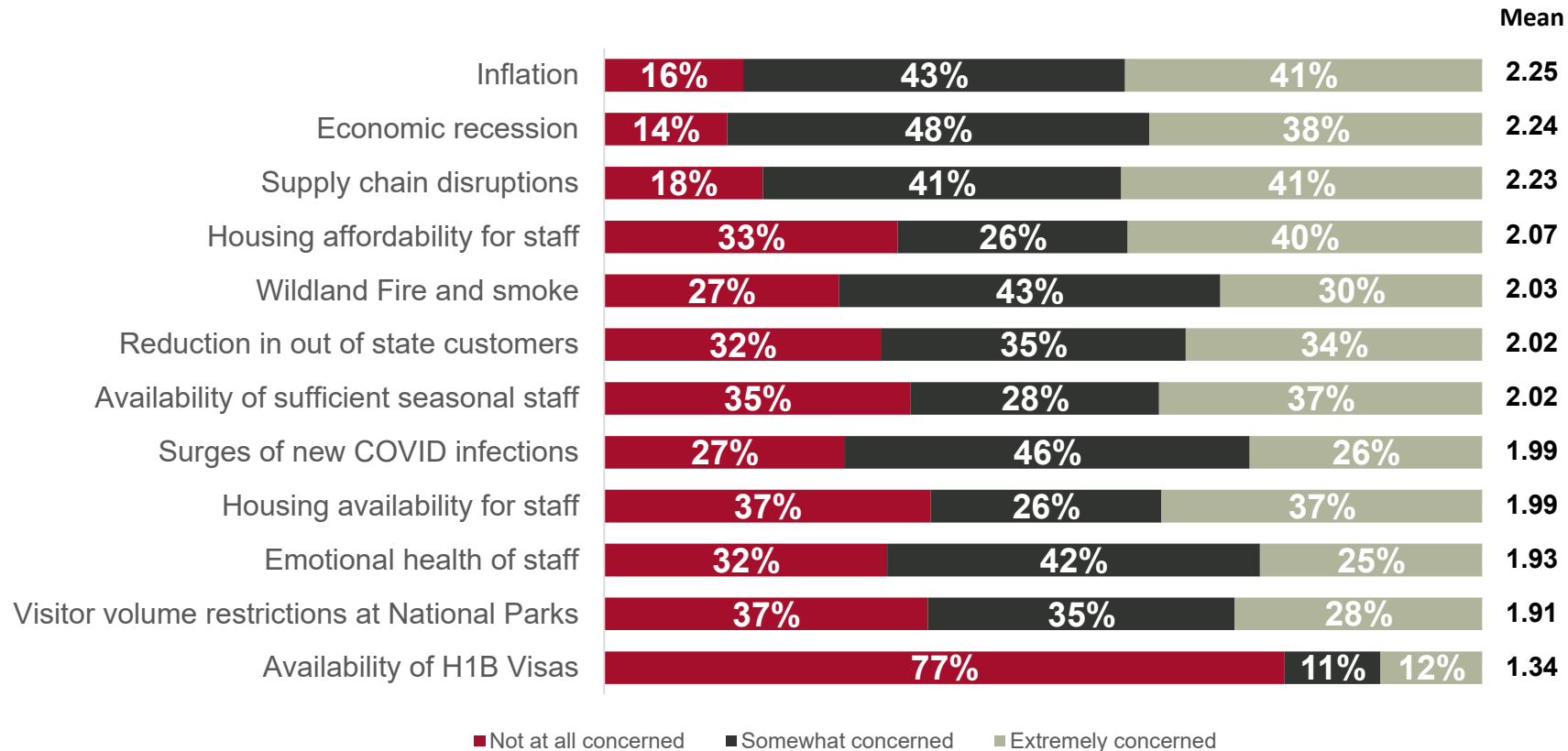


Source: Institute for Tourism and Recreation Research

# 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



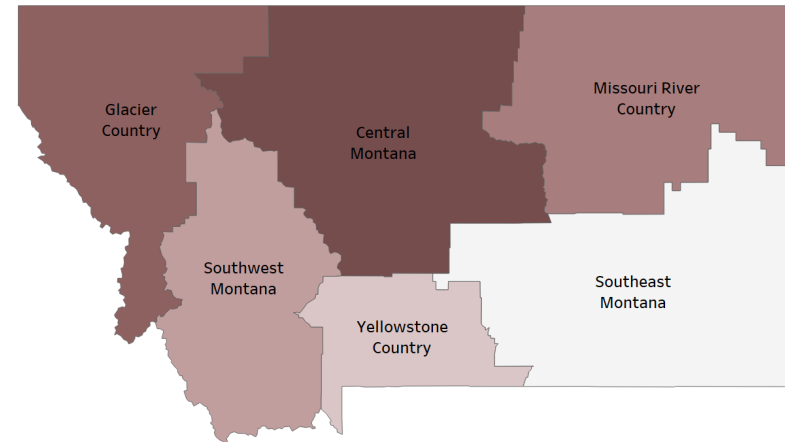
Source: Institute for Tourism and Recreation Research

# Montana Resident Travel and Tourism Perceptions

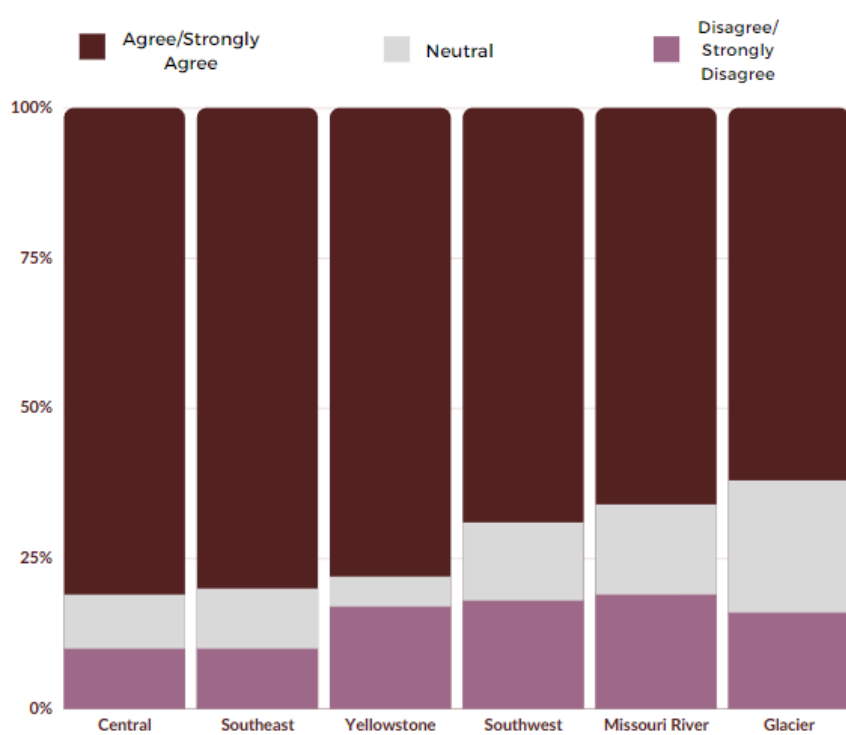
## TRACKING RESIDENT ATTITUDES SINCE 1992

- 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.

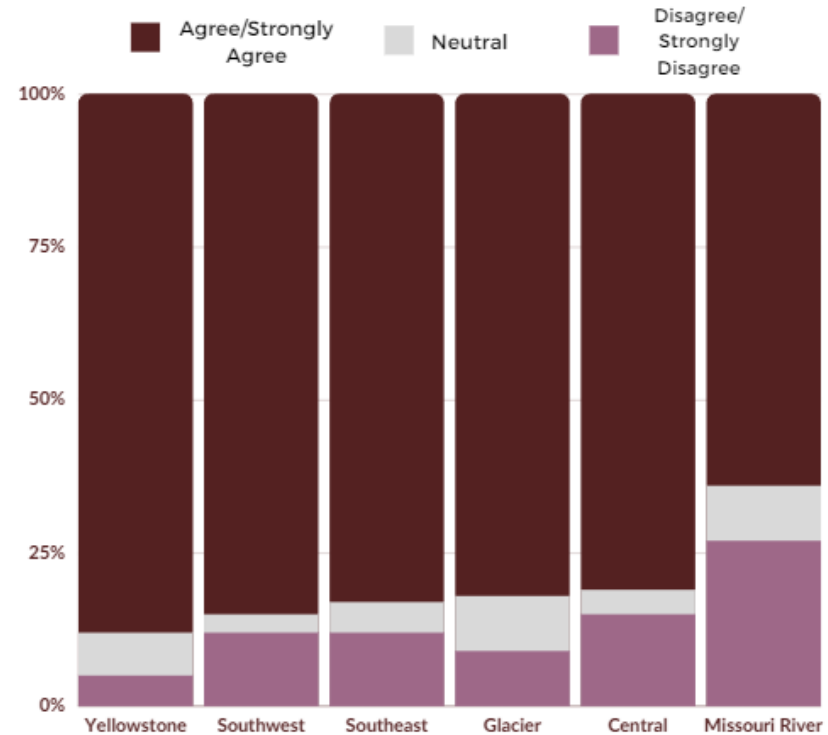
## MONTANA TRAVEL REGIONS



# TOURISM'S BENEFITS AND IMPACTS



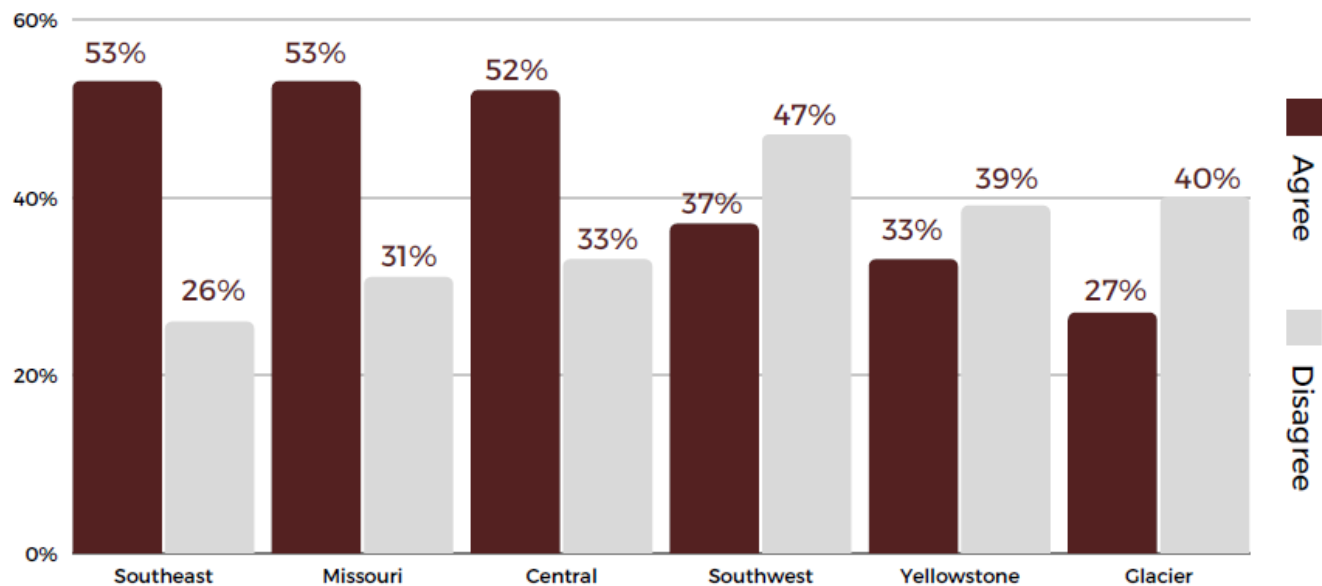
**THE OVERALL BENEFITS OF TOURISM OUTWEIGH THE NEGATIVE IMPACTS**



**TOURISM PROMOTION BY THE STATE BENEFITS MY COMMUNITY ECONOMICALLY**



# TOURISM AND QUALITY OF LIFE



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

Agree  
Disagree

**22%**

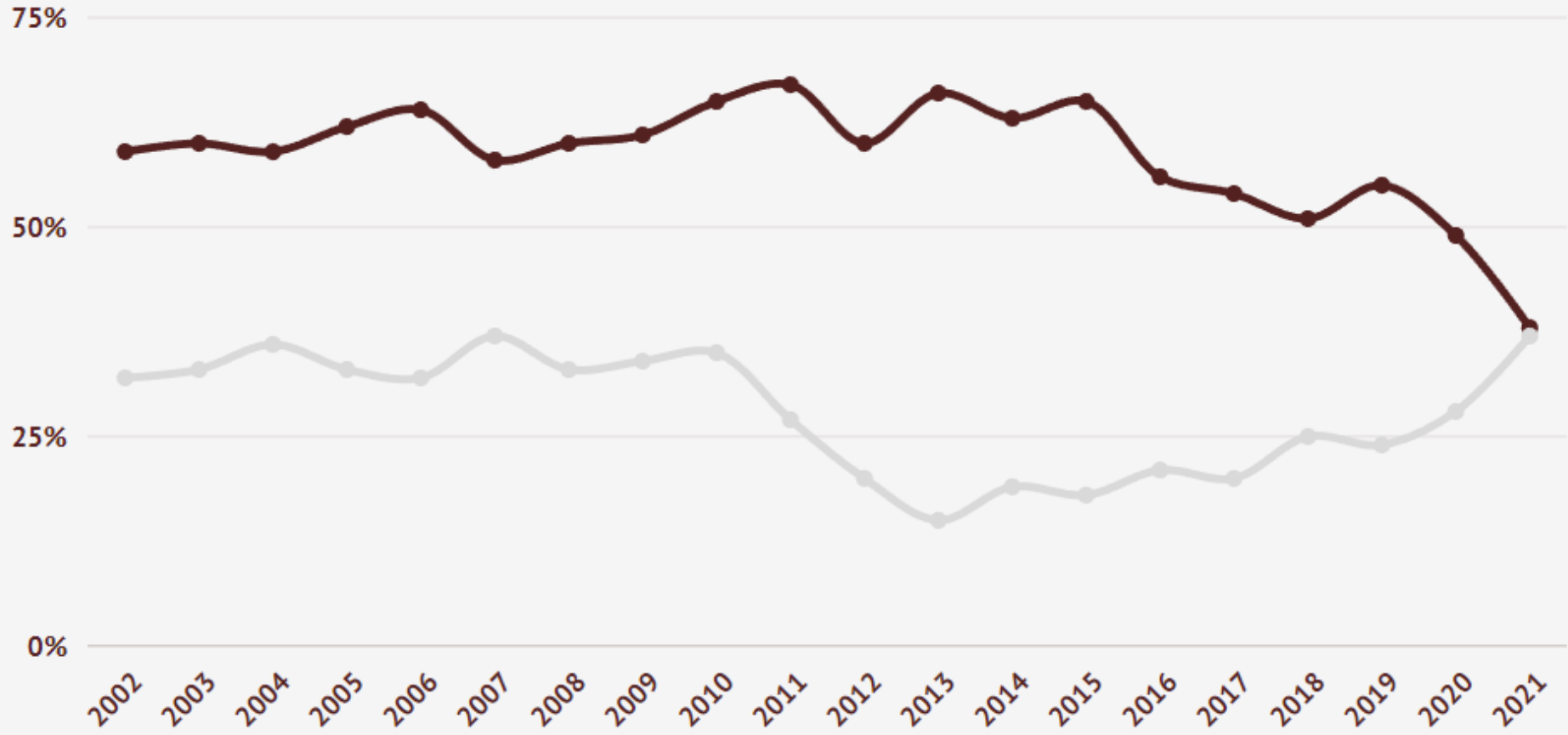
*Decrease in agreement since 2020*

**32%**

*Increase in disagreement since 2020*

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

- Agree
- Disagree



## 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

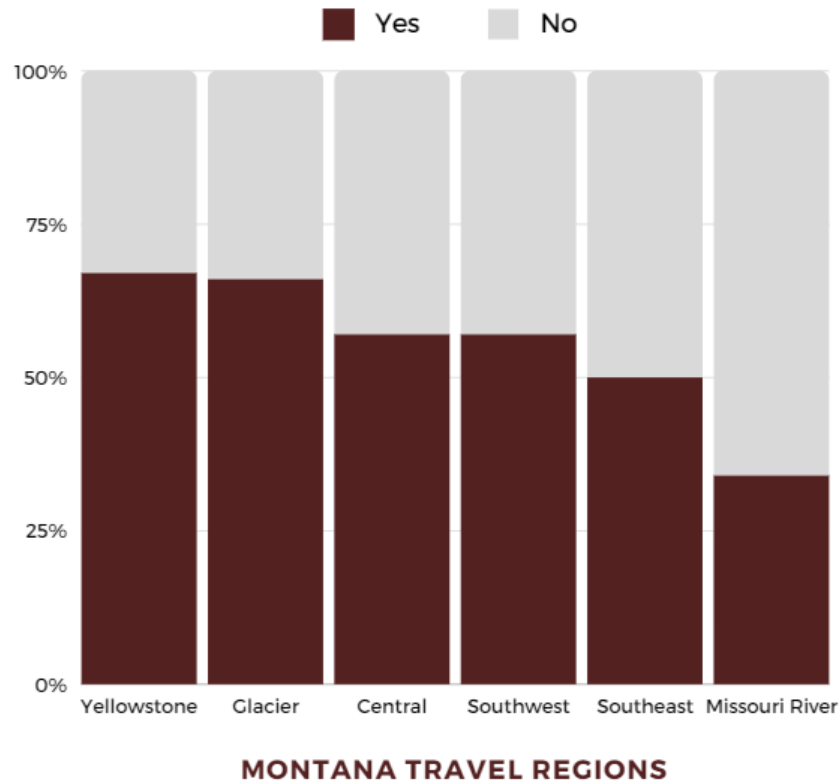
- "People moving here are the cause of crowding"
- "Crowding is from people moving in"
- "Economically, yes - good. Influx moving in is hurting us"

## 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?



**36%**

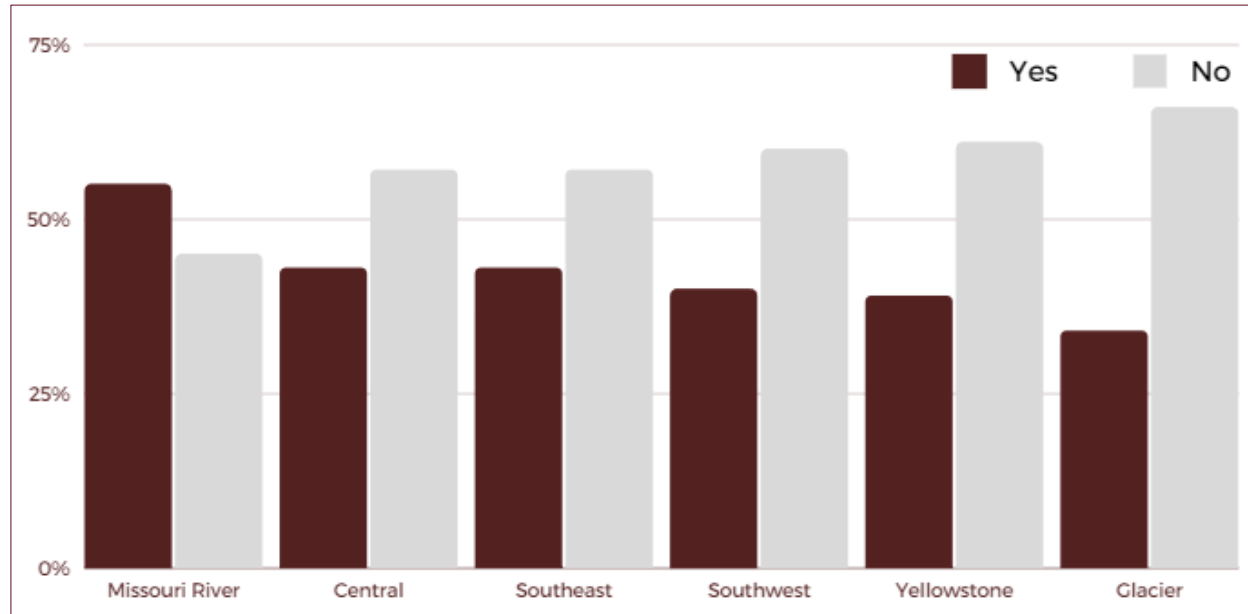
*Visited new public lands*

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**17%**

*Participated in new activities*

# PUBLIC LAND MANAGEMENT

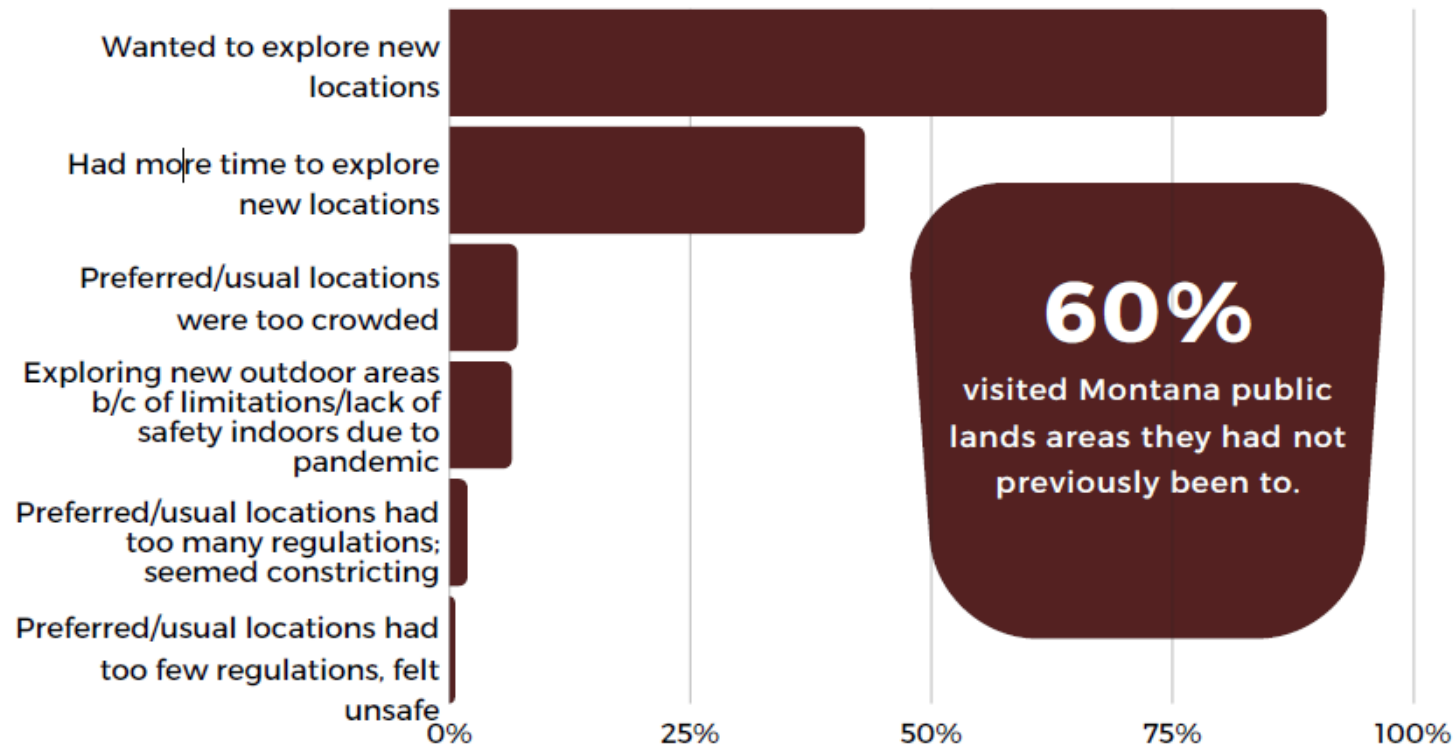


DO YOU FEEL PUBLIC LAND MANAGEMENT AGENCIES IN MONTANA ARE SUFFICIENTLY STAFFED?

**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?

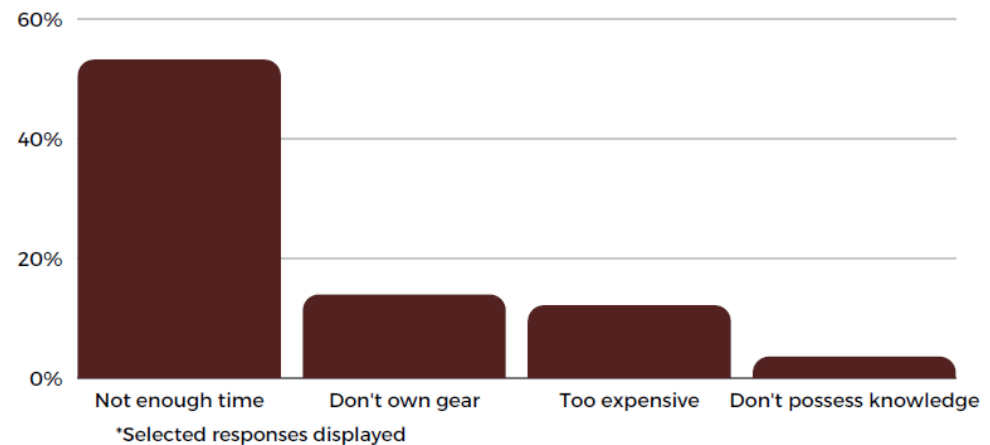


# NONRESIDENT PUBLIC LAND ACTIVITIES & USES

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

**22%**  
 Indicated there were public land activities they wanted to participate in, but could not for various reasons

WHY COULDN'T YOU/DIDN'T YOU PARTICIPATE IN THE ACTIVITY OR ACTIVITIES ON MT PUBLIC LANDS?





# 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

**Whitefish Farmers Market**

Q1. Are you a resident of Montana?  Yes  No (Skip to Q4.)

Q2. Are you attending this event with out of area visitors?  Yes  No

Q3. Is your primary residence in Whitefish?  
 Yes (Skip to Q14 on back)  No (go to C3a.)  
 Q3a. Zip code (then go to C2b.)

Q4. In what state, province, or foreign country do you reside?

Q5. Is this your first time visiting Whitefish?  Yes  No

Q6. Was attending this event your primary reason for being in Whitefish?  Yes  No

Q7. For what other reasons are you visiting Whitefish? (Check all that apply.)  
 Vacation/recreation/pleasure  Just passing through  Business/convention/meeting  
 Visiting friends/relatives  Shopping

Q8. On this trip, how many nights will you spend away from home?  
 0 (Skip to Q11.)  1  2  3  4  5  6  7  8  9  10 or more

Q9. How many of those nights are in Montana?  
 0  1  2  3  4  5  6  7  8  9  10 or more

Q10. Of your nights in Montana, how many will you stay in Whitefish?  
 0  1  2  3  4  5  6  7  8  9  10 or more

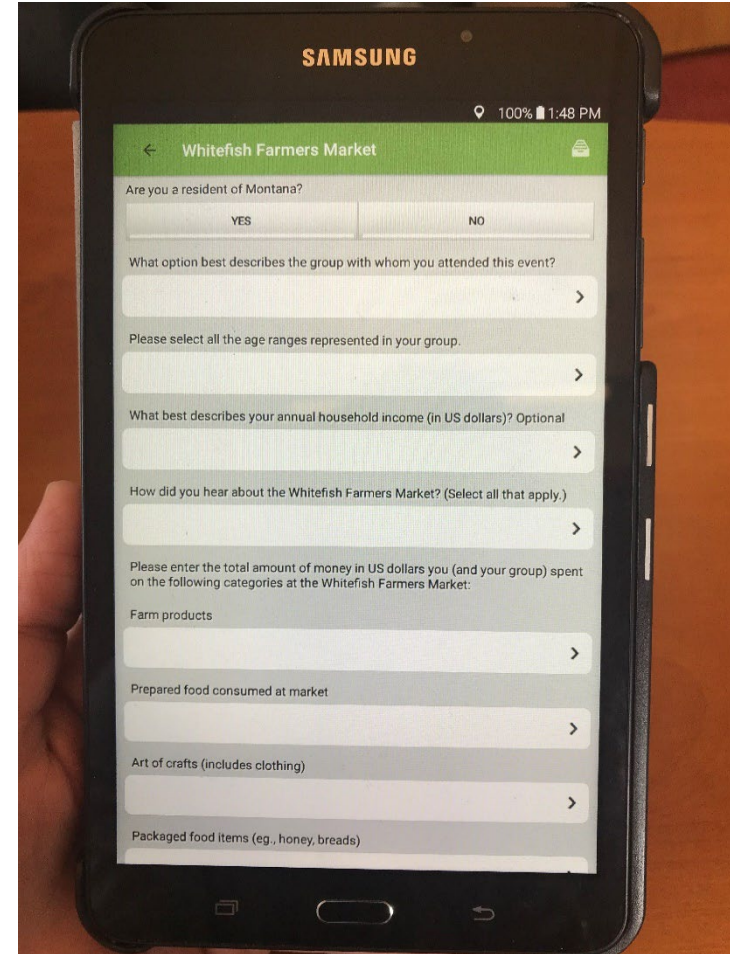
Q11. In what type of accommodation(s) will you stay in Whitefish? (Check all that apply.)  
 Hotel/motel/bed & breakfast  Public land camping  Second home/cabin/condo  
 Rental cabin/home/condo (includes Airbnb, VRBO)  Private campground  Resort  
 Home of friend/relative  Guest ranch

Q12. Please enter your best estimate of the TOTAL amount of money in US dollars you (and your family/travel group, if applicable) will spend in WHITEFISH in each of the following categories. If you will not spend money in a category, please leave it blank.

<b>ACCOMMODATIONS in Whitefish</b>	<b>TRANSPORTATION in Whitefish</b>
Hotel/motel/bed & breakfast \$ <input type="text"/>	Gasoline/diesel \$ <input type="text"/>
Campground \$ <input type="text"/>	Local transportation \$ <input type="text"/>
Rental home/cabin/condo \$ <input type="text"/>	Auto rental \$ <input type="text"/>
<b>FOOD in Whitefish</b>	<b>RETAIL/SERVICES in Whitefish</b>
Restaurant/bar \$ <input type="text"/>	Retail goods/services \$ <input type="text"/>
Groceries/snacks \$ <input type="text"/>	Entertainment/recreation \$ <input type="text"/>

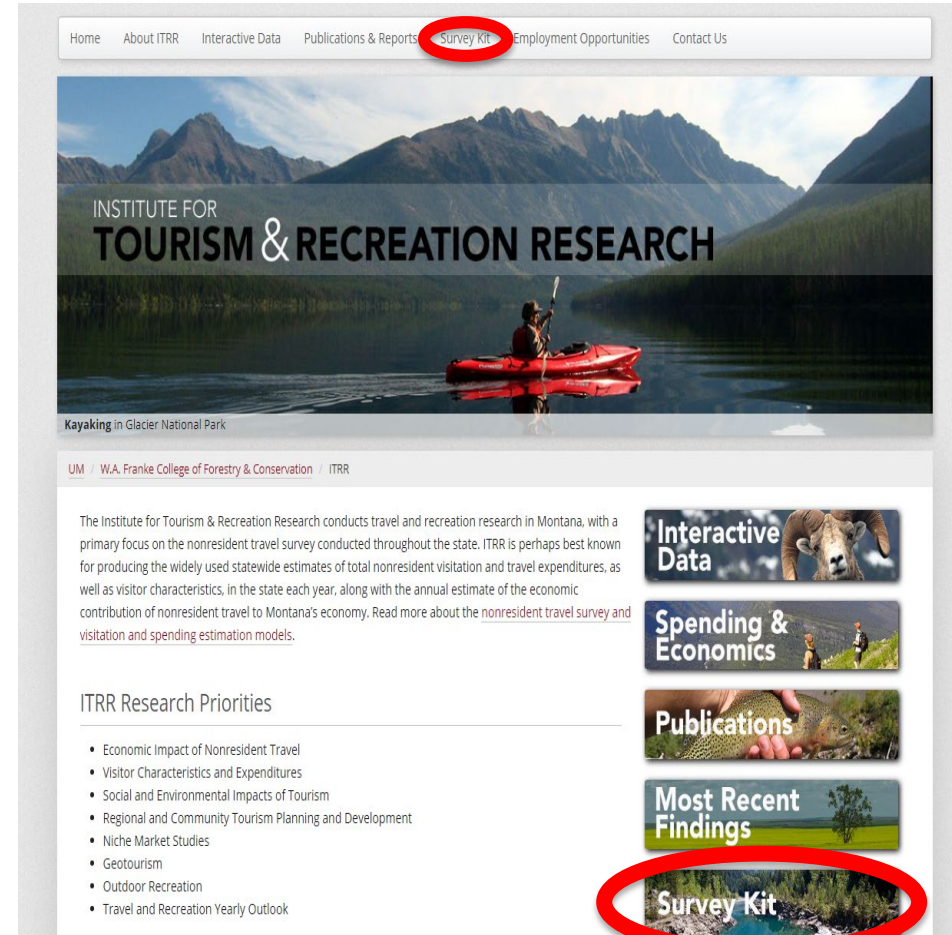
Q13. How many people does the above spending represent (including yourself, i.e., your travel group/family size)?  
 1  2  3  4  5  6  7  8  9  10  more than 10

Continue on back...



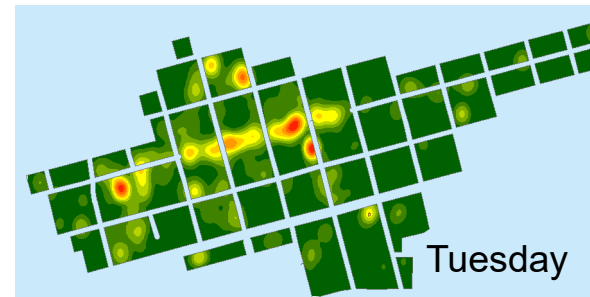
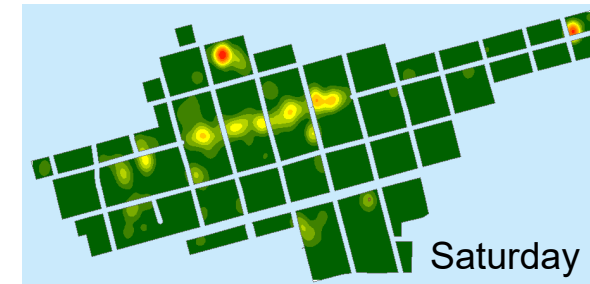
# Survey Kit Uses

- Potential for smaller areas to do data collection and help with marketing plans and applying for grants
- Buying this information from consultants \$\$\$



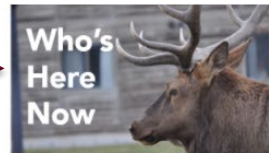
# Survey Kits: Improving Data Analyses

- 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

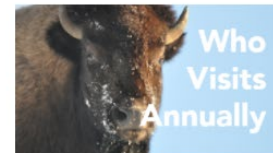


For all information from the Institute for Tourism and Recreation Research, please see: [itrر.umt.edu](http://itrر.umt.edu)

Get Started with our NEW Tableau-based Interactive Data by selecting a button or link below.



\*Coming Soon\*



\*Coming Soon\*



Our full interactive data report with drop down filters replicating the feel of our Legacy report



Our full interactive data on a lighter dashboard with interactive filtering

ITRR produces annual estimates of total travel-related spending by nonresidents in Montana. These estimates are used to evaluate the total contribution of nonresident travel spending to Montana's economy. To view these estimates, click on a year in the list below. Historical estimates can be found by searching ITRR's publications in ScholarWorks.

[2020 Nonresident Visitation, Expenditures & Economic Impact Estimates](#)

[2019 Economic Contribution of Nonresident Travel Spending in Montana Travel Regions and Counties](#)