

INSTITUTE FOR TOURISM & RECREATION RESEARCH

Tourism Advisory Council Update

October 9, 2024 - Virtual



PRESENTATION OUTLINE

- Welcome & Introductions
- ITRR Updates
 - New Team Members
 - Mission/Values
 - New Dashboards
 - Outreach & Communication
- Project Progress
- Research Impacts





Dr. Melissa Weddell
Director & Research Faculty



Carter Bermingham
Social Scientist &
Research Associate



Elena Bigart
Social Scientist &
Research Associate



Kika Bradford
Social Scientist and
Research Associate



Kara Grau
Assistant Director of
Economic Analysis



Glenna Hartman
Program Assistant &
Qualitative Specialist



Matthew Pettigrew
Data Engineer & Research
Associate



Megan Schultz
Project Manager & Research
Associate



Rachel Shouse
Communications Director



Glenna Tawney
Research Project Director &
Event Manager



Ava Worbets
Graduate Student



Emma Keinath-Lopez
Graduate Student

ITRR MISSION

The mission of the Institute for Tourism & Recreation Research (ITRR) is to conduct rigorous and impartial research that empowers the tourism and recreation industries in Montana to make informed decisions in planning, marketing, policy, and management. As part of the W.A. Franke College of Forestry and Conservation at the University of Montana, ITRR is committed to the highest academic integrity, ensuring transparency and excellence in all research efforts.



ITRR VALUES

Commitment to Excellence in Research: ITRR is dedicated to conducting evidence-based, impartial research that serves as a cornerstone for informed decision-making within the tourism and recreation industries.

Innovation: ITRR critically explores and examines new methods and advances in technology to further research and provide cutting-edge data.

Academic Excellence: Hosted at the University of Montana, ITRR adheres to research standards and guidelines, ensuring the highest level of academic integrity and transparency in research methods.

Engaging and Preparing Future Leaders: ITRR is committed to engaging students and preparing the next generation of leaders in parks, tourism, and recreation management.

Collaboration and Community Engagement: ITRR emphasizes collaboration, working closely with stakeholders to exchange knowledge and gather comprehensive data that benefit Montana communities.

Supporting Montana's Tourism and Recreation Sectors: ITRR values community-centered approaches that offer insights for partners who manage parks, recreation areas, and tourism sites.

Leadership in Applied Research: ITRR is a leader in research, assisting public agencies, businesses, and non-profit organizations in planning, marketing, policy development, and management strategies.

ITRR RESEARCH PRIORITIES + CYCLE

- ITRR serves as the research arm for Montana's tourism and recreation industry
- Established in 1987 at the University of Montana's W.A. Franke College of Forestry and Conservation
- Funded by a portion of the revenues from the state Lodging Facility Use Tax
- Objective Research in tourism and recreation to support industry for strategic planning, marketing, policymaking, and management overseen by the TAC
- Supports Montana Public Agencies & Businesses through reliable, objective research on visitor services and facility management



37 YEARS OF PROVIDING TRAVEL, TOURISM, AND RECREATION RESEARCH

ITRR ONGOING RESEARCH PROJECTS

Quarterly Nonresident Analysis

Quarterly Resident Analysis

Annual Economic Impacts and Outlook

Tourism and Recreation Monitoring

State Park Visitation

Survey Kits



SURVEY KITS

- Service for a minimal fee
 - \$500-800
 - Depends on the methods
- Includes
 - Survey design
 - Guidance on data collection
 - Data entry and analysis
 - Report on results
 - Includes open-ended comments
- 2024 Survey Kits
 - Montana Fair
 - Montana Folk Festival
 - Anaconda Smeltermens Day
 - East Helena Valley Rodeo
 - Clark Fork River Pedal & Farm Tour

QUARTERLY NONRESIDENT RESEARCH

- On-going since July 2009
- Each Intercept:
 - Up-front survey on iPad
 - Mailback survey
- Understanding the Total Population of Visitors to Montana
 - 10 Surveyors covering 9 Territories
 - Over 65 Communities Represented
 - Each working 29 hours per week*

Visitor
Counts

DOT Counts
(MT, ID, ND,
WY)

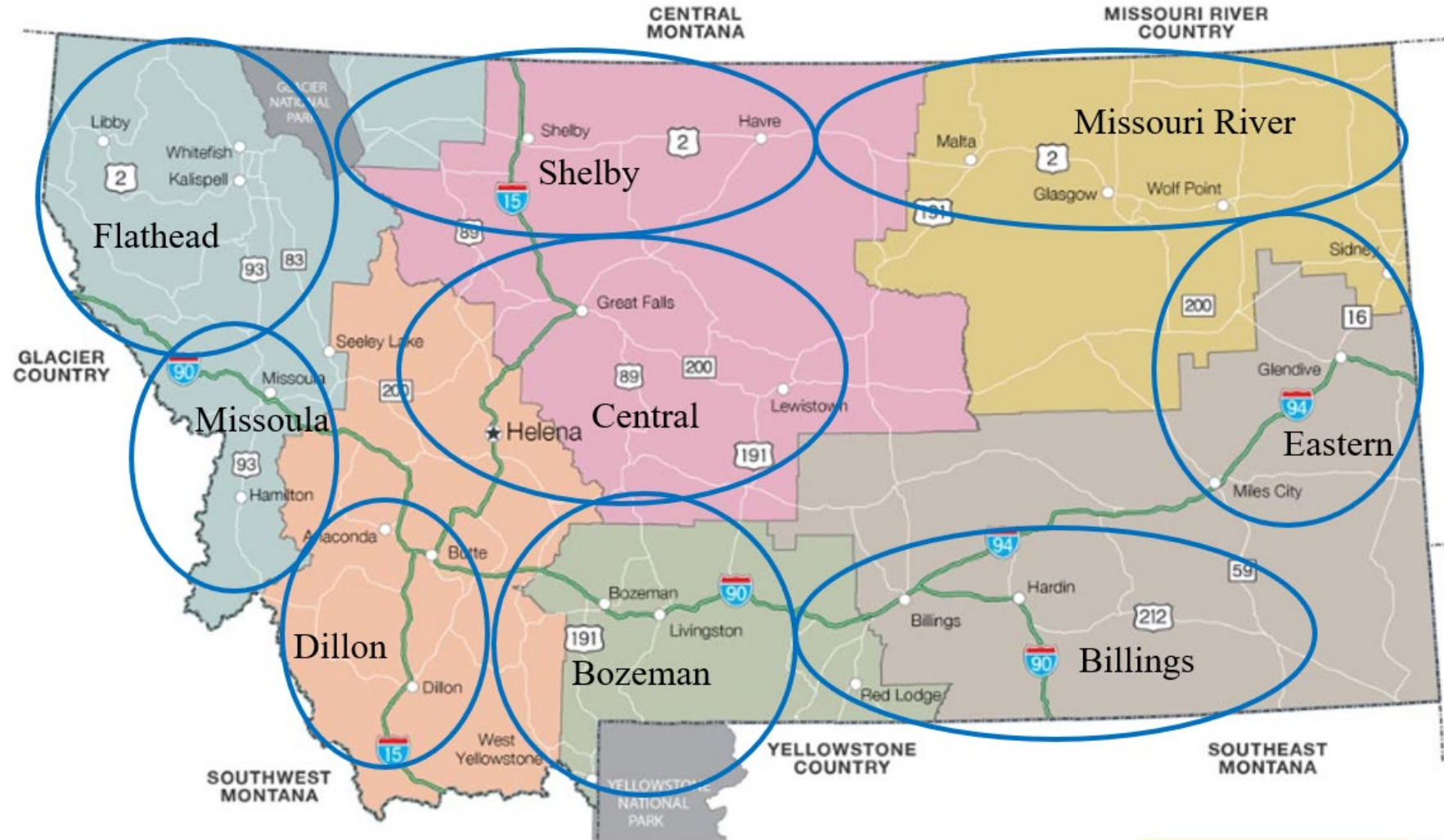
Survey Data

Montana
Airport
Deboarding

Canadian
Border



DATA COLLECTION TERRITORIES



ITRR DATA DASHBOARDS - UPDATED



INSTITUTE FOR TOURISM & RECREATION RESEARCH

NONRESIDENT SURVEY DRAFT

Understanding Travel Behavior Across Montana

INTRODUCTION

Two survey types are used to collect nonresident travel data:

- **Intercept Survey:** A survey completed by nonresidents during their visit to Montana.
- **Mailback Survey:** A continuation of the survey distributed to participants from the on-site intercept.

[VIEW INTERCEPT RESULTS ►](#)

[VIEW MAILBACK RESULTS ►](#)

[VIEW INTERCEPT & MAILBACK RESULTS ►](#)

METHODOLOGY

ITRR currently employs 10 surveyors, covering eight areas, in various locations around the state. Each surveyor/area averages 25 to 29 working hours per week, year-round, including travel time to survey locations, survey data collection, and highway and airport proportion counts. The sampling schedule allows survey shifts and proportion counts to cover a wide range of days and times during which visitors may be travelling, and ensures that the data is representative of the variability of all types of travelers.

2023 THE MONTANA TRAVEL INDUSTRY

12.5 MILLION VISITORS SPENT \$5.45 BILLION

SPENDING CATEGORIES

Food & Beverage \$1.4B	Lodging \$1.1B	Transportation \$1.6B	Shopping \$600M	Outfitter/Guide \$500M
----------------------------------	--------------------------	---------------------------------	---------------------------	----------------------------------

WHEN ARE TRAVELERS COMING TO MONTANA

Q1 11%	Q2 26%	Q3 48%	Q4 15%
-----------	-----------	-----------	-----------

\$930 Average tax burden reduced on every Montana household by tourism

\$414M STATE AND LOCAL TAXES

48,340 JOBS SUPPORTED

5 NIGHTS SPENT ON AVERAGE

\$1.5B EMPLOYEE COMPENSATION (DIRECT)

1-IN-12 MONTANA WORKERS SUPPORTED BY OUT-OF-STATE TRAVEL

AVERAGE TRAVEL PARTY SIZE 2.3

\$4.8B INDUSTRY OUTPUT (DIRECT)

69% Montana residents agree that the overall benefits of tourism outweigh the negative impacts

NUMBER OF VISITORS TO MONTANA



TOP ACTIVITIES

- SCENIC DRIVING (42%)**
- DAY HIKING (34%)**
- WILDLIFE WATCHING (28%)**
- NATURE PHOTOGRAPHY (26%)**



The Institute for Tourism & Recreation Research (ITRR) conducts travel and recreation research in Montana, primarily focusing on the nonresident travel survey conducted throughout the state. ITRR's mission is to provide leadership, direction, and information to assist the tourism and recreation industries in making informed decisions about planning, marketing, policy, and management. www.itrr.umt.edu



INSTITUTE FOR
TOURISM & RECREATION
RESEARCH

ANNUAL REPORT

2023



COMMUNICATION & OUTREACH

- ~300 Individuals Registered for Listening Sessions
- Montana Outdoor Recreation Summit
- Outdoor Recreation Resource Website
- [Annual Report/Infographic](#)
- Online Publications and [Data Dashboards](#)
- Individual Data Request on Website
- [Call for 2024-25 Projects](#)

PROJECT COMMUNICATION & ENGAGEMENT

What We're Working On

Explore More →



**From Dioramas to Dinosaurs:
The Impacts of Montana
Museums and Exploring
Paleontological Tourism**



Montana's Trail to the Stars



**Montana Agritourism and
Recreation: 20 Years Later**

2023-24 TAC RESEARCH PROJECTS

Yellowstone Flood Recovery & Resiliency

Tourists' Preferences for Stargazing in Eastern MT

Impacts of Short-term Rentals in Montana

Montana Agritourism & Recreation: 20 Years Later

Recreation Access (Cooke City/Silver Gate)

Understanding Eastern Montana Visitor

2024-25 TAC RESEARCH PROJECTS

Montana's Paleontological Tourism

Contributions and Impacts of Montana Museums

Impacts of Montana Meetings and Conventions

A Study of Flathead Lake Level Impacts on the Tourism Economy

Understanding Reservoir Recreation (Canyon Ferry)

Montana's Outfitting Industry

Understanding Tourist Disengagement with Montana

ITRR RESEARCH IMPACTS

- Report Downloads
 - ~16,044 Annual Downloads
 - 110k Downloads since 2014
- In 2023 ITRR
 - Surveyed ~10,000 nonresidents
 - Surveyed ~18,000 residents
- BBER Economic Summit
 - 10 cities/present to ~5000 Montanans
- Rural Community Pilot Support
- Infographic/Annual Report



NATIONAL PARK COLLABORATION

- 2024 Research Sites

- Fort Frederica National Monument (GA)
- Casa Grande Ruins National Monument (AZ)
- John Day Fossil Beds National Monument (OR)
- Indiana Dunes National Park (IN)
- Point Reyes National Seashore (CA)





"CONTINUING THE CONVERSATION" WEBINAR SERIES: CELEBRATING SUCCESS STORIES IN OUTDOOR RECREATION

HOSTED BY:



W.A. FRANKE
COLLEGE OF FORESTRY
AND CONSERVATION

This exciting series aims to **highlight successful projects, share best practices,** and **foster collaboration** to address challenges in creating, building, and sustaining Montana's outdoor recreation experiences. Each webinar will build on the 2023 Montana Outdoor Recreation Summit workshops, featuring:

- Success stories from Montana communities
- Interactive discussions
- Practical takeaways

This series will be publicly announced next week. Follow our socials/sign up for our email list for updates

WEBINAR EPISODES

- [Get Grant Ready: A Success Story \(November 14th\)](#)
- [Unleashing the Power of Data-Driven Storytelling \(December 12th\)](#)
- [Indigenous Voices in Outdoor Recreation \(January 16th\)](#)
- [Harmony in the Wild: Strategies for Mitigating Human/Wildlife Conflict \(February 20th\)](#)
- [Inclusive Recreation: Enhancing Accessibility for All in Your Community \(March 13th\)](#)

QUESTIONS?

Institute for Tourism and Recreation Research
itrr@umontana.edu



@itrsumt

