

FY26 University Travel Research Program

The legislative appropriated dollars for the Travel Research Program for FY25 were \$1,466,444.00. The proposed projects for FY26 are listed below, although appropriated FY26 funds may not be known until early/mid-2025. This budget was estimated based on the previous year’s allocation. The Research Committee of the Tourism Advisory Council (TAC) recommends the ITRR research projects for each fiscal year. The following projects were brought forth to the TAC Research Committee for discussion and approval on January 27, 2025 project scope and budgets are listed below for the February 4, 2025, TAC meeting.

Please consider that the costs associated with the research project are approximations and are subject to potential adjustments. Additionally, the scopes and objectives of the research project are initially formulated through submissions and general discussions with submitters and the TAC. These scopes and objectives are subject to refinement and increased specificity following community and stakeholder listening sessions. This iterative process is aimed at ensuring that the research outcomes align effectively with the evolving needs of Montanans.

Research projects and costs for FY26:

<u>FY26 Proposed Projects and Admin Budget</u>	<u>Operations</u>	<u>Salary/Benefits</u>	<u>Total</u>
1. Quarterly Nonresident Travel and Recreation Analysis	\$102,500.00	\$460,960.07	\$563,460.07
2. 2025 Economic Impacts and 2026 Outlook	\$6,400.00	\$60,269.94	\$66,669.94
3. Tourism and Recreation Monitoring	\$6,000.00	\$100,264.50	\$106,264.50
4. ITRR Data Mining	\$0.00	\$27,680.23	\$27,680.23
5. Emerging Issues	\$0.00	\$14,160.22	\$14,160.22
6. Survey Kits	\$3,000.00	\$11,039.76	\$14,039.76
7. Resident Attitudes	\$5,000.00	\$20,513.02	\$25,513.02
8. Data Visualization & Research Collaboration	\$15,000.00	\$149,314.23	\$164,314.23
9. Fiscal Year Projects	\$33,600.00	\$170,759.62	\$204,359.62
9a. The Impact of Sports Tourism in Montana	\$5,040.00	\$25,613.94	\$30,653.94
9b. Visitor Use Patterns in the Bob Marshall Wilderness Complex	\$5,040.00	\$25,613.94	\$30,653.94
9c. Analyzing the Impact of the Continental Divide Trail in Montana	\$5,040.00	\$25,613.94	\$30,653.94
9d. Montana on Screen: How Film Tourism Drives Visitor Spend	\$5,040.00	\$25,613.94	\$30,653.94
9e. Empowering Communities: The Role of Native Tourism in Montana's Economy	\$6,720.00	\$34,151.92	\$40,871.92
9f. Arts, Culture, and Community: Measuring the Impact Across Montana	\$3,360.00	\$17,075.96	\$20,435.96
9g. Supporting Montana Communities Through the Pilot Community Tourism Grant Program	\$3,360.00	\$17,075.96	\$20,435.96
Administration	<u>\$90,200.00</u>	<u>\$55,895.76</u>	<u>\$146,095.76</u>
Total	<u>\$261,700.00</u>	<u>\$1,070,857.35</u>	<u>\$1,332,557.35</u>

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

Quarterly Nonresident and Resident Visitor Analysis (Ongoing)

Introduction

In July 2009, ITRR began the nonresident visitor survey throughout the state. This ongoing, high-value project provides 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 the economic impact of tourism on the state.

Purpose and Objectives

The main purposes of this project are to 1) assess nonresident visitor characteristics on an ongoing 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.

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.
- The 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>
\$102,500.00	\$460,960.07	\$563,460.07

2025 Economic Impacts and 2026 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 2025. The objective is to disseminate this information widely among Montanans through Bureau of Business of Economic Research Economic Outlook Seminars in 8-10 Montana cities, the 2025 Outlook article, the Governor's Conference on Tourism, and various group events across the state.

Objectives:

- To estimate 2025 visitation through secondary data sources and ITRR nonresident data.
- To project 2026 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 2026 will be presented with the Bureau of Business and Economic Research to 8-10 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. Initial economic and visitation data for 2026, crucial for the planning of tourism-related businesses and agencies, will be accessible in January 2025, with the finalized figures becoming available in late April 2026. The ITRR website will contain the newly updated information.

Anticipated Timeframe: On-going

<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
\$6,400.00	\$60,269.94	\$66,669.94

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 are a combination of primary data collection, secondary data, and reports from other entities.

Objectives:

- Continually collect and update trend data on the ITRR interactive data web page to include skier visits, airport deboarding, 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 CVBs, 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 the University of Montana news media.
3. TAC, Montana Office of Tourism and Business Development, regions, and CVBs 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>
\$6,000.00	\$100,264.50	\$106,264.50

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>
\$0.00	\$27,680.23	\$27,680.23

Survey Kits (Ongoing)

Purpose and Objectives

The purpose of the survey kit is to assist communities, organizations, or event managers in researching 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. Typically, an annual range of 4 to 7 survey kits are administered.
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>
	\$0.00	\$14,160.22	\$14,160.22

The Impact of Sports Tourism in Montana (One-time)

Introduction

Communities across Montana, from small towns to the largest city, are increasingly investing in and organizing sports tournaments and other sporting events designed to attract visitors across the region. Understanding the impact of these events on visitor spending and visitation will help Convention and Visitors Bureaus (CVBs), local economic development entities, and other community stakeholders effectively plan for and utilize sports tourism as assets for their communities.

Purpose

This study analyzes the impact of sports tourism on visitation and economic activity in Montana communities. By examining specific sports events, we aim to provide insights to help local stakeholders maximize the benefits of sports tourism.

Objective

1. Case Study Analysis – Examine two to three sports tourism events across different Montana communities, including both indoor and outdoor events (e.g., Class C basketball state tournament, major ice fishing tournament), to assess their impact on visitation, spending, and local economies.
2. Visitor and Economic Impact Assessment – Analyze visitor demographics, spending patterns by category, lodging occupancy, and overall attendance. If feasible, conduct surveys with participants and spectators to understand their preferences and motivations for attending these events.
3. Stakeholder and Regional Insights – Gather input from local stakeholders, including Convention and Visitors Bureaus (CVBs), to define key sports tourism events and assess their perceived value. Compare the impact of in-state audience-driven events versus those that attract a broader regional or national audience.

Methods

This study will employ a mixed-methods approach, combining quantitative data collection with qualitative insights from stakeholders and participants. The research will focus on selected sports tourism events in Montana communities and will utilize the following methodologies:

1. Case Study Approach
2. Data Collection & Analysis
 - Visitor Demographics & Spending Patterns:
 - Surveys & Interviews:
3. Comparative & Stakeholder Analysis
4. Geographic & Event Type Considerations
5. Data Interpretation & Reporting

Outcomes

This study will assess the economic and social impact of sports tourism in Montana, providing insights for CVBs, local governments, and event organizers. By analyzing visitor spending, lodging occupancy, and stakeholder input, the findings will help communities maximize sports tourism' benefits. Results will be shared through reports and presentations, equipping decision-makers with data to attract and sustain successful events, ultimately driving economic growth and regional development.

<u>Operating</u>	<u>Salary/ benefits</u>	<u>Total*</u>
\$5,040.00	\$25,613.94	\$30,653.94

Visitor Use Patterns in the Bob Marshall Wilderness Complex (One-time)

Introduction

The Bob Marshall Wilderness Complex (BMWC) is a vast and iconic landscape in Montana, attracting visitors and locals throughout all four seasons. It is a special place worth visiting and protecting, but efforts to manage and conserve it are challenged by a lack of accurate data and necessary context related to visitation. With over 110 entry points, none of which are gate-kept, any visitor use estimate is considerably extrapolated. The U.S. Forest Service (USFS), the land manager responsible for stewardship and maintenance, conducts National Visitor Use Monitoring (NVUM). However, the three forests involved in the BMWC (Flathead, Helena/Lewis & Clark, and Lolo) do not conduct NVUM in the same calendar year, and each forest only collects NVUM every three years. Additionally, the FS often uses existing employees, who conduct NVUM on top of their regular duties, leading to concerns about the quality and applicability of the data.

Other entities, such as Montana Fish, Wildlife & Parks (MT FWP), outfitters, guides, and Convention and Visitors Bureaus (CVBs), provide some data, but none are comprehensive. The BMWC is a significant driver of Montana's booming tourism industry and central to many Montanans' sense of outdoor culture and identity. Accurate visitor use data is essential for informed management decisions that balance conservation and public visitation interests.

Purpose

This study aims to obtain representative visitor use data across the entire BMWC. This data will include the number of visitors, their demographic profile, mode of transport, expected destinations, activities, and seasonality of their visitation. The study aims to provide a comprehensive understanding of the pressure humans are putting on this incredible landscape and identify potential threats to the sustainable conservation of its natural resources.

Objectives

1. Visitor Count and Demographics: Accurately estimate the number of visitors to the BMWC and gather demographic information such as age, gender, and place of origin.
2. Mode of Transport: Identify the various modes of transport used by visitors to access the BMWC.
3. Visitor Destinations and Activities: Determine the expected destinations within the BMWC and the activities visitors engage in, such as hiking, fishing, hunting, and camping.

Methods

This study will employ a mixed-methods approach, integrating quantitative and qualitative data collection techniques to comprehensively understand visitor use patterns. This includes collecting visitor count and demographic data, analyzing mode of transport, assessing visitor destinations and activities, analyzing seasonal visitation, and interpreting and reporting data.

Outcomes

The findings will be compiled into a comprehensive report for the BMWC, Montana CVBs, regional organizations, supporting agencies, and promotional entities. Key insights will be shared through reports, press releases, presentations, and website updates to ensure broad accessibility. This study will provide valuable data to guide sustainable conservation efforts and support informed decision-making in managing visitor impact on the BMWC.

<u>Operating</u>	<u>Salary/ benefits</u>	<u>Total*</u>
\$5,040.00	\$25,613.94	\$30,653.94

Analyzing the Impact of the Continental Divide Trail in Montana (One-time)

Introduction

The Continental Divide Trail (CDT) is a renowned north-south trail that stretches from Glacier National Park to Yellowstone National Park, traversing the stunning landscapes of Montana. With growing domestic and international interest, the CDT attracts a diverse array of users and visitors. However, there is currently no comprehensive data available on the demographics of these hikers, their trips, or the trail's economic impact on communities and businesses in Montana's tourism regions. This study aims to fill that gap by providing detailed insights into the CDT's and its visitors' financial contributions.

Project Scope

This project will analyze the Continental Divide Trail's economic impact on Montana's communities and businesses. By collecting and analyzing data on visitor demographics, spending patterns, trip planning, and visitation processes, the study will provide a comprehensive understanding of the trail's economic contributions. The project will also explore the unique needs of CDT visitors and identify business and service opportunities to better serve this growing segment of tourists.

Objectives

1. CDT Visitor Profile and Economic Impact – Identify and analyze the demographics, spending habits, trip planning behaviors, and economic contributions of Continental Divide Trail (CDT) visitors, including both hikers and affiliated travelers, to Montana’s communities and businesses.
2. Visitor Needs and Market Opportunities – Assess the unique needs of CDT visitors and explore opportunities for new or enhanced products, services, and marketing strategies to better serve and attract this audience.

Methods

This study will use surveys, interviews, and economic analysis to assess CDT visitors' demographics, spending habits, and trip-planning behaviors. Data from hikers, affiliated visitors, and local businesses will quantify the trail’s economic impact on Montana communities.

Outcomes

The analysis will be compiled into a report for use by public land managers, Montana CVBs, regional entities, supporting agencies, and promotional groups. Findings will be shared through reports, press releases, presentations, and website updates to ensure broad accessibility. Using both quantitative and qualitative analysis, the results will inform sustainable trail management, economic development, and strategic planning efforts.

<u>Operating</u>	<u>Salary/ benefits</u>	<u>Total*</u>
\$5,040.00	\$25,613.94	\$30,653.94

Montana on Screen: How Film Tourism Drives Visitor Spend

Introduction

Montana's stunning landscapes and unique cultural heritage have made it a popular location for film and television productions. With \$334 million in film spending and 2.2 million visitors previously associated with film tourism, the state is experiencing significant economic benefits from this industry. This study aims to explore whether the visual representation of Montana on screen translates into actual visitors and visitor spending. By understanding the impact of film tourism, especially in rural areas, we can identify how the actions of the film industry influence tourism patterns and economic activity in Montana.

Project Scope

This project will analyze the economic impact of film tourism in Montana, focusing on how visual representations of the state in film and television influence visitor numbers and spending. The study will examine specific examples, such as increased visitation to Virginia City due to westerns and the Daly Mansion due to the TV show "Yellowstone." The goal is to provide a comprehensive understanding of how film tourism can be leveraged to boost Montana's tourism industry, particularly in rural areas.

Objectives

Film Tourism Impact and Visitor Analysis – Identify and describe the demographics, travel patterns, and spending behaviors of film tourists in Montana while assessing the overall economic impact on local communities.

Methods

This study will utilize a mixed-methods approach, integrating quantitative and qualitative data collection techniques to assess the impact of film tourism in Montana. The research will focus on visitor demographics, economic contributions, and stakeholder perspectives to develop effective tourism strategies.

Outcomes

This study will quantify the economic impact of film tourism in Montana, analyzing visitor demographics, spending patterns, and the influence of films on travel. Reports, press releases, presentations, and website updates will all be part of the information dissemination.

<u>Operating</u>	<u>Salary/ benefits</u>	<u>Total*</u>
\$5,040.00	\$25,613.94	\$30,653.94
\$5,040.00	\$25,613.94	\$30,653.94

Empowering Communities: The Role of Native Tourism in Montana's Economy

Introduction

Tourism to Native American communities, sites, and businesses is in high demand within Montana. Despite this growing interest, there is currently no comprehensive economic data on the value that Native sites, attractions, and businesses contribute to the state's economy. This study aims to fill that gap by quantifying the economic impact of Native tourism and highlighting its significance within Montana's broader tourism landscape. By understanding the contributions of Native tourism, we can support sustainable growth, empower Native communities, and enhance cultural tourism in the state.

Project Scope

This project will assess the economic impact of Native tourism on Montana's economy by analyzing visitor profiles, spending patterns, and demand drivers. It will also identify barriers to growth and opportunities for collaboration. The goal is to provide evidence-based insights that guide policymakers, tribal leaders, and tourism stakeholders in making informed decisions to support and enhance Native tourism.

Objectives

1. Economic and Market Impact – Quantify the contributions of Native American tourism to Montana's economy, including revenue generation, employment, visitor demographics, and spending patterns.
2. Cultural Significance and Tourism Demand – Analyze the unique characteristics of Native American tourism, identifying key demand drivers, visitor motivations, and barriers to growth compared to other tourism sectors.

Methods

This study will use a mixed-methods approach to assess the economic impact, visitor behavior, and growth opportunities of Native American tourism in Montana.

Outcomes

The analysis will be compiled into a report for communities, Montana CVBs, regional organizations, and promotional entities, with findings shared through reports, press releases, presentations, and website updates. Findings will be analyzed using quantitative and qualitative methods to support sustainable growth, economic empowerment, and cultural preservation.

<u>Operating</u>	<u>Salary/ benefits</u>	<u>Total*</u>
\$6,720.00	\$34,151.92	\$40,871.92

Arts, Culture, and Community: Measuring the Impact Across Montana

Introduction

Art is often perceived as mere entertainment or decoration and sometimes as a tourism booster. However, arts nonprofits are locally controlled small businesses, and artists are entrepreneurs who contribute significantly to community vitality and healthy downtowns. Until the recent spike in housing costs, Montana had the highest per-capita concentration of painters in the country. The creative industries employ 16,520 Montanans, making it the 6th largest industry in the state, according to the US Bureau of Economic Analysis. As art programs in schools diminish, federal arts funding faces challenges, and downtowns across Montana struggle to remain economically viable, it is increasingly important to understand the full socio-economic impact of the arts in Montana's communities, both large and small. Existing state-specific data is very general, and the last statewide study was conducted over a decade ago. This study aims to provide detailed, data-supported information on the economic impact of arts activities across Montana.

Project Scope

This project will analyze the economic impact of arts activities across Montana, focusing on both county-level and statewide data. The study will examine the effect of arts activities on local businesses, the impact of public funding on arts activities, and the role of arts in community livability and tourism. The goal is to provide a comprehensive understanding of the importance of arts activities to Montana's communities and to inform strategies for maximizing their benefits.

Objectives

1. Economic and Business Impact – Quantify the economic contributions of arts activities in Montana.
2. Community and Tourism Influence – Assess how arts activities enhance community livability, including social connections, workforce recruitment, and retiree engagement, while also analyzing their role in tourism by identifying visitor demographics and the types of events that attract the most tourists.

Methods

This study will employ a mixed-methods approach, combining economic analysis, surveys, stakeholder interviews, and trend assessments to evaluate the impact of arts activities in Montana.

Outcomes

This study will quantify the economic impact of arts activities in Montana, particularly in rural areas, and assess how arts activities enhance community livability through social connections and workforce engagement. The analysis will be compiled into a report for communities, Montana CVBs, regional organizations, and promotional entities, with findings shared through reports, press releases, presentations, and website updates.

<u>Operating</u>	<u>Salary/ benefits</u>	<u>Total*</u>
\$3,360.00	\$17,075.96	\$20,435.96

Supporting Montana Communities Through the Pilot Community Tourism Grant Program

Introduction

The Pilot Community Tourism Grant Program (PCTGP) was established by the 2023 Montana Legislature through Senate Bill 540. This state-funded initiative aims to enhance Montana communities' economic vibrancy, sustainability, and unique qualities, making them attractive destinations for visitors.

Project Scope

The research project will support Montana communities participating in the PCTGP by providing tailored research, community and visitor surveys, and pre/post-program measurement to ensure data-driven decisions and measurable outcomes.

Objectives:

1. **Data-Driven Decisions:** Provide communities with the research and tools needed to make informed decisions.
2. **Measure Impact:** Conduct pre- and post-program surveys to assess the long-term impact of tourism-related investments.

Methods

1. **Community and Visitor Surveys:**
 - Develop and distribute surveys to gather insights from community members and visitors.
 - Align tourism investments with local and visitor priorities.
2. **Community Research:**
 - Gather insights from residents about valued tourism-related investments.
 - Organize and facilitate community meetings to discuss findings.
3. **Visitor Research:**
 - Understand the types of visitors attracted to the community, their preferences, and perspectives.
4. **Pre/Post Measurement for Long-Term Impact:**
 - Conduct pre-program surveys to establish baseline data.
 - Conduct post-program surveys to measure changes in community perceptions, visitor feedback, and the impact of tourism investments.

Methods

This study will employ a mixed-methods approach, combining economic analysis, surveys, stakeholder interviews, and trend assessments to evaluate the impact of arts activities in Montana.

Outcomes

Outcomes include increased economic activity, adoption of sustainable tourism practices, and enhanced community appeal as visitor destinations. Data-driven insights will support informed decision-making, leading to effective tourism strategies, while measurable impact assessments will demonstrate the program's success. The Institute for Tourism and Recreation Research (ITRR) will collaborate with Montana communities, providing ongoing support and resources to ensure long-term sustainability and success of the PCTGP initiative.

<u>Operating</u>	<u>Salary/ benefits</u>	<u>Total*</u>
\$3,360.00	\$17,075.96	\$20,435.96

Travel Research Program Projects FY05-FY25

FY25

	<u>Operations</u>	<u>Salary/Benefits</u>	<u>Total</u>
1. Quarterly Nonresident Travel and Recreation Analysis	\$102,500.00	\$564,773.59	\$667,273.59
2. 2023 Economic Impacts and 2024 Outlook	\$6,400.00	\$65,919.60	\$72,319.60
3. Tourism and Recreation Monitoring	\$6,000.00	\$111,911.11	\$117,911.11
4. ITRR Data Mining	\$0.00	\$53,000.62	\$53,000.62
5. Emerging Issues	\$0.00	\$75,783.40	\$75,783.40
6. Survey Kits	\$0.00	\$10,952.64	\$10,952.64
7. Resident Attitudes	\$5,000.00	\$36,012.74	\$41,012.74
8. Data Visualization & Research Collaboration	\$15,000.00	\$193,018.77	\$208,018.77
9. Economic, Social, and Infrastructure Impact Tool	\$33,600.00	\$127,194.60	\$160,794.60
9a. Beyond Fossils: Investigating the Socioeconomic Footprint of Montana's Paleontological Tourism	\$5,040.00	\$19,079.19	\$24,119.19
9b. Beyond Artifacts: Unveiling the Contributions and Impacts of Montana Museums	\$6,720.00	\$25,438.92	\$32,158.92
9c. Understanding the Impact of Montana Meetings and Conventions	\$3,360.00	\$12,719.46	\$16,079.46
9d. Montana's Outfitting Industry: Economic Impact and Industry-Client Analysis	\$6,720.00	\$25,438.92	\$32,158.92
9e. Navigating Water Challenges: A Study of Flathead Lake Levels Impacts on the Tourism Economy	\$3,360.00	\$12,719.46	\$16,079.46
9f. Understanding Tourist Disengagement's Influence on Montana Tourism	\$1,680.00	\$6,359.73	\$8,039.73
9g. Canyon Ferry Recreation Survey	\$6,720.00	\$25,438.92	\$32,158.92
Administration	<u>\$87,200.00</u>	<u>\$76,540.30</u>	<u>\$163,740.30</u>
Total	<u>\$255,700.00</u>	<u>\$1,315,107.36</u>	<u>\$1,570,807.36</u>

FY24

	<u>Operations</u>	<u>Salary/Benefits</u>	<u>Total</u>
1. Quarterly Nonresident Travel and Recreation Analysis	\$100,500.00	\$476,061.46	\$576,561.46
2. 2022 Economic Impacts and 2024 Outlook	\$6,400.00	\$55,898.16	\$62,298.16
3. Tourism and Recreation Monitoring	\$6,000.00	\$93,616.46	\$99,616.46
4. ITRR Data Mining	\$0.00	\$42,718.70	\$42,718.70
5. Emerging Issues	\$0.00	\$59,490.30	\$59,490.30
6. Survey Kits	\$0.00	\$9,472.03	\$9,472.03
7. Resident Attitudes	\$5,000.00	\$29,611.52	\$34,611.52
8. Data Visualization & Research Collaboration	\$13,000.00	\$174,830.18	\$187,830.18
9. Economic, Social, and Infrastructure Impact Tool	\$25,600.00	\$110,234.21	\$135,834.21
9.a Yellowstone Natural Disaster and Tourism Impacts and Recovery	\$6,400.00	\$22,046.84	\$28,446.84
9.b The Ever-Changing Dynamics of Short Term Rentals in Montana	\$1,280.00	\$16,535.13	\$17,815.13

9.c Montana Dark Skies: Understanding the Stargazing Visitor	\$7,680.00	\$27,558.55	\$35,238.55
9.d Uncovering the Eastern Montana Visitor	\$0.00	\$11,023.42	\$11,023.42
9.e Montana Agritourism and Recreation Business Administration	\$10,240.00	\$33,070.26	\$43,310.26
	<u>\$34,550.00</u>	<u>\$62,965.86</u>	<u>\$97,515.86</u>
Total	\$191,050.00	\$1,114,898.87	\$1,305,948.87

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 2024 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	\$21,255	\$68,194	\$89,449
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 Administration	\$500	\$23,318	\$23,818
	<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>
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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	<u>\$72,700</u>	<u>\$346,130</u>	<u>\$418,830</u>
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/</u> <u>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	<i>\$62,300</i>	<i>\$247,988</i>	<i>\$310,288</i>
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
