

FY25 University Travel Research Program

The legislative appropriated dollars for the Travel Research Program for FY24 was \$1,364,134.00, with \$149,074.79 carried over. The proposed projects for FY25 are listed below, although appropriated FY25 funds may not be known until early/mid-2024. This budget was estimated based on the previous year's allocation and carryover. 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 September 29, 2023. The project scope and budgets are listed below for the January 25, 2024, TAC Research Committee meeting. This will then be brought to the full council's meeting on February 6, 2024.

Please consider that the costs associated with the research project are approximations and are subject to potential adjustments. Additionally, the scope and objectives of the research project are initially formulated through submissions and general discussions with submitters and the Research Committee. 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 FY25:

<u>Budget</u>	<u>Operations</u>	<u>Salary/Benefits</u>	<u>Total</u>
1. Quarterly Nonresident Travel and Recreation Analysis	\$102,500.00	\$506,049.75	\$608,549.75
2. 2023 Economic Impacts and 2024 Outlook	\$6,400.00	\$65,919.60	\$72,319.60
3. Tourism and Recreation Monitoring	\$6,000.00	\$102,869.13	\$108,869.13
4. ITRR Data Mining	\$0.00	\$53,000.62	\$53,000.62
5. Emerging Issues	\$0.00	\$21,389.02	\$21,389.02
6. Survey Kits	\$3,000.00	\$10,952.64	\$13,952.64
7. Resident Attitudes	\$5,000.00	\$34,759.94	\$39,759.94
8. Data Visualization & Research Collaboration	\$15,000.00	\$184,209.47	\$199,209.47
9. Fiscal Year Projects	\$33,600.00	\$216,656.48	\$250,256.48
9a. Beyond Fossils: Investigating the Socioeconomic Footprint of Montana's Paleontological Tourism	\$5,040.00	\$32,498.47	\$37,538.47
9b. Beyond Artifacts: Unveiling the Contributions and Impacts of Montana Museums	\$6,720.00	\$43,331.30	\$50,051.30
9c. Understanding the Impact of Montana Meetings and Conventions	\$3,360.00	\$21,665.65	\$25,025.65
9d. Navigating Water Challenges: A Study of Flathead Lake Levels Impacts on the Tourism Economy	\$3,360.00	\$21,665.65	\$25,025.65
9e. Tool for Understanding Reservoir Recreation (Canyon Ferry Survey)	\$6,720.00	\$43,331.30	\$50,051.30
9f. Montana's Outfitting Industry: Economic Impact and Industry-Client Analysis	\$6,720.00	\$43,331.30	\$50,051.30
9g. Understanding Tourist Disengagement's Influence on Montana Tourism	\$1,680.00	\$10,832.82	\$12,512.82
Administration	\$90,200.00	\$76,540.30	\$166,740.30
Total	\$261,700.00	\$1,272,346.94	\$1,534,046.94
			-\$67,602.94
		Carry forward	\$ 149,074.79
		Total	\$ 81,471.85

**Operating includes 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	\$506,049.75	\$608,549.75

2024 Economic Impacts and 2025 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 2024 visitation through secondary data sources and ITRR nonresident data.
- To project 2025 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 Montana tourism business owners.

Outcomes

The following information will be provided from this project:

1. The Tourism and Recreation Outlook 2025 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 2023, crucial for the planning of tourism-related businesses and agencies, will be accessible in January 2024, with the finalized figures becoming available in late April 2024. 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	\$65,919.60	\$72,319.60

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, -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., USTA, U.S. Dept. of Commerce, Bureau of Economic Analysis (BEA) Outdoor Recreation Statistics, etc.
- 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 and ITRR social media channels.
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	\$102,869.13	\$108,869.13

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**

Optional Reports or per request:

- **Major attraction analysis:** These reports use survey data in the "main attraction" category to provide the zone of influence of these attractions. This includes everything from landscape to historic features, parks, and some activities.
- **Niche activity analysis:** Depending on the needs of stakeholders 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	\$53,000.62	\$53,000.62

Survey Kits (Ongoing)

Purpose and Objectives

The purpose of the survey kit is to assist communities, organizations, or event managers in understanding 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>
\$3,000.00	\$10,952.64	\$13,952.64

Beyond Fossils: Investigating the Socioeconomic Footprint of Montana's Paleontological Tourism (One-time)

Introduction

Dinosaurs may be Montana’s oldest tourist attraction and drive folks to rural areas of the state. Spanning across Montana, the Montana Dinosaur statewide trail encompasses 14 locations, stretching from the Montana Dinosaur Center in Bynum to the Carter County Museum in Ekalaka. Visitors frequently plan vacations around dinosaur-themed locations, leading to increased museum attendance and attraction visitation across communities. Despite this trend, there is a lack of a comprehensive statewide study to understand visitation patterns and economic impacts associated with dinosaur-related tourism. This research aims to thoroughly investigate Montana Dinosaur Trail & Paleo Tourism, delving into its effects on local economies, community development, and visitor experiences.

[Welcome to the Montana Dinosaur Trail! \(mtdinotrail.org\)](http://mtdinotrail.org)

Purpose

This research aims to provide an in-depth understanding of how the Montana Dinosaur Trail & Paleo Tourism contributes to local economies, community development, and visitor experiences.

Research Questions

- **Demographic Data Collection:**
 - Gather information on demographics, including age, the number of individuals in the traveling party, departure points, and specific destination locations.
- **Travel Behavior & Preferences:**
 - Is the trip planned around a specific museum?
 - What motivates travel during this time of the year, and what is the preferred month for travel?
 - Identify resources used for planning the route, both in advance and on the road.
 - Determine the routes taken through Montana and assess willingness to explore alternative routes with provided information.
 - Investigate lodging preferences, including type and desired amenities or services.
 - Explore dining preferences, including the type of food and beverage, and desired amenities or services in food, beverage, retail, or entertainment experiences.
 - Understand the type of information desired for planning a return visit to Montana.
- **Community and Economic Impact Assessment:**
 - Evaluate the impacts on communities, including development and economic effects, arising from travel to Dinosaur museums in Montana.
 - Compile estimated visitor numbers from all museums.

Methods

This study will employ various research methods.

1. Mine data from ITRR nonresident visitor intercepts for visitor profiles.
2. Purchase stickers (Montana Dinosaur logo) with a QR code on the back to take an online survey about experiences.
3. QR Code postcards and posters at museum locations with a link to the online survey.
4. Post-event survey distribution across the state with museum partners.
5. Online survey and administered to a survey panel.

Outcomes

The research outcomes from visitors to Montana's paleontological sites will be compiled into a report for utilization by dinosaur museums, CVBs, regional entities, and other supporting organizations. The recommendations will offer valuable insights to museums, providing decision-making support and essential data. Understanding the needs and behaviors of paleontology tourists will be crucial in customizing promotional efforts aimed specifically at attracting this group to Montana. Information dissemination will encompass reports, press releases, presentations, and website updates.

Anticipated Timeframe: May 2024-April 2025

<u>Operating</u>	<u>Salary/ benefits</u>	<u>Total*</u>
\$5,040.00	\$32,498.47	\$37,538.47

Beyond Artifacts: Unveiling the Contributions and Impacts of Montana Museums (One-time)

Introduction

Montana boasts a rich tapestry of hundreds of museums, each intricately weaving narratives of the state's history, culture, and art. Serving as foundational elements of Montana's tourism, these cultural and heritage attractions bring millions of visitors annually, representing diverse backgrounds and regions across the country. Ensuring the preservation, care, and ongoing development of these cultural assets is imperative. Equally important is the commitment to providing visitors with enduring value for their investment and delivering a high-quality and enriching experience.

[Museums \(visitmt.com\)](https://www.visitmt.com)

[List of museums in Montana - Wikipedia](#)

[Museums Association of Montana - Home \(montanamuseums.org\)](https://montanamuseums.org)

[Measuring the Social Impact of Museums – American Alliance of Museums \(aam-us.org\)](https://aam-us.org)

[Measuring the impact of museums on their communities-The role of the 21st-century museum.pdf \(researchgate.net\)](#)

[Handbook of Industry Studies and Economic Geography - Google Books](#)

[Museum Management and Marketing - Google Books](#)

Purpose

This study seeks to investigate the evolution of museums, encompassing their social, educational, and economic impacts, as well as their strategies for community engagement. Moreover, the study could expand to include the Measurement of Museum Social Impact ([MOMSI](#)) to understand the multifaceted and beneficial outcomes for individual visitors and their broader impact on communities, from exploring identity-related motivations for museum visits to understanding the overall influence on individuals and neighborhoods.

Research Questions:

1. How have museums evolved in terms of their social roles and engagements within communities over recent years?
2. What educational impacts do museums have on visitors, and how have these impacts changed or adapted to contemporary needs?
3. In what ways do museums contribute to the economic landscape of their operational environments and the broader community?
4. How do museums currently engage with their local communities, and what strategies do they employ for effective community involvement?
5. What challenges do museums face in showcasing and quantifying their impact within communities, and how do they address these challenges?
6. What role does effective community engagement play in ensuring the sustained support and funding of museums, and how do museums navigate these relationships?
7. How have museums adapted their strategies to align with expectations for demonstrating their significance and relevance within local communities?
8. In what ways can museums enhance their impact and value proposition to better meet the expectations of local communities and secure continued support?

Methods

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

Outcomes

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

Anticipated Timeframe: July 2024-July 2025

Operating
\$6,720.00

Salary/ benefits
\$43,331.30

Total*
\$50,051.30

Understanding the Impact of Montana Meetings and Conventions (One-time)

Introduction

The resurgence of meeting and convention tourism is evident as the pandemic recedes. However, in Montana, there has been a notable absence of successful studies comprehensively exploring the characteristics of statewide conventions and their economic impacts.

["Economic Impact of Convention and Meetings to Montana: Methodological " by Rita J. Black and Paul L. Grant \(umt.edu\)](#)

Purpose:

This research aims to fill a critical gap by conducting a comprehensive study on meetings and conventions in Montana.

Objectives:

- **Estimate Economic Impact:**
 - Assess the economic impact of conventions on local communities and the overall state of Montana. This includes analyzing spending patterns, job creation, and other economic contributions attributed to hosting conventions.
- **Motivation Analysis:**
 - Examine the motivations influencing the selection of Montana as a convention site. Understand the factors that attract event organizers to the state and contribute to its appeal as a host destination.
- **Conventions Quantification:**
 - Estimate the number and size of conventions held throughout the state. This involves identifying key locations, venues, and sectors that frequently host such events and understanding their scale and frequency.
- **Comparison with National Statistics:**
 - Compare Montana's convention statistics with national benchmarks. Evaluate how the state's meetings and conventions landscape aligns with or differs from broader national trends, providing valuable insights into its unique characteristics.

Methods

This study will be conducted by creating an online and mailback survey to distribute to venues and meeting planners across the state.

**Limitations noted in 1997 study: Outlines the attempt to replicate a study in Montana originally conducted nationally. The study was not completed because of an inability to obtain cooperation from the conference associations and hotel properties. This report explains the methodology and the difficulties encountered during the study attempt.*

Outcomes

The analysis will be written into a report to be used by all meeting and convention organizations, MT CVBs, regions, supporting agencies, and other promotional entities. 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>
\$3,360.00	\$21,665.65	\$25,025.65

Navigating Water Challenges: A Study of Flathead Lake Levels Impacts on the Tourism Economy

Introduction

During the summer of 2023, Flathead Lake experienced historically low water levels, attributed to diminished streamflow in northwest Montana following a season of inadequate snowfall and rapid spring runoff. This decline occurred approximately a month earlier than the usual schedule, sparking conflicts among stakeholders regarding the cause and potential solutions. The scarcity of water, however, stemmed from both drought conditions and the changing climate. Boats were removed from the lake earlier than usual, impacting recreational activities, and, anecdotally, tourism saw a decline. The issue of low water levels has sparked concerns as water is utilized for both hydropower and recreation,

creating conflicts upstream. At the same time, downstream, reduced flows adversely affect native fish populations and farmers.

[Shrinking Flathead Lake stresses tourism, energy production \(kpax.com\)](#)

[Following 'Covid Bubble' Burst, Tourism Demand Returns to Pre-pandemic Levels - Flathead Beacon](#)

[Flathead Lake at precarious level as drought comes to northwest Montana \(montanafreepress.org\)](#)

Purpose

The aim of this research is to investigate the influence of lake levels on the operations of tourism and recreation businesses in the summer of 2023.

Objectives

- Examine how historically low water levels at Flathead Lake during the summer of 2023 affected the operations and economic performance of tourism and recreation businesses.
- Assess the consequences of early boat removal and reduced water levels on recreational activities at Flathead Lake. Analyze the patterns of visitor behavior and the overall impact on tourism.
- Quantify the decline in tourism at Flathead Lake during the studied period and assess the economic ramifications for local businesses, including the tourism and recreation sectors.

Methods

This study will be conducted by creating an online and mailback survey to recreation and tourism businesses in the surrounding communities of Flathead Lake.

Outcomes

The analysis will be written into a report to be used by communities, MT CVBs, regions, supporting agencies, and other promotional entities. 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>
\$3,360.00	\$21,665.65	\$25,025.65

Tool for Understanding Reservoir Recreation (Canyon Ferry Survey)

Introduction

Canyon Ferry is one of Montana's foremost recreation areas because of its proximity to Helena, Great Falls and Butte, as well as a destination between Yellowstone and Glacier for the RVer. The reservoir covers 25 miles and there are 24 Bureau of Reclamation maintained recreation sites around the reservoir. There is east access to the reservoir from US Highway 12 east of Helena or just north of Townsend. Canyon Ferry offers a variety of recreational opportunities, including boating, year-round fishing for trout and walleye, camping, sightseeing, picnicking, hunting, waterskiing, nature study, and swimming. Boat access is available at all the campsites. Several additional public boat launch areas are located near the dam on the north end and near Townsend on the south end. Canyon Ferry has seen an increase in visitation and, as a result, overcrowding, trash, misuse, and user conflicts.

["Canyon Ferry Recreation Survey: 2003-2004" by Robert Dvorak, Norma P. Nickerson et al. \(umt.edu\)](#)

Purpose

The overall purpose of the Canyon Ferry Recreation Study is to understand the characteristics of recreational use and users at representative sites on Canyon Ferry reservoir and to compare the summer information to results from the 2002/2003 and 1995 and 1999 Canyon Ferry studies to examine recreation trends. In addition, this survey tool for understanding reservoir-based recreation can be used by other stakeholders and managers in the state.

Objectives

- determine socio-demographic characteristics of on-site users.
- determine on-site activity participation.
- determine levels of overall trip satisfaction, satisfaction of existing facilities, settings and management, and identification of needed facilities.
- identify potential/existing conflicts among user groups and where they occur.
- explore attachment to place and “sense of place” and how it may explain existing/potential use patterns.
- investigate potential changes in visitation patterns due to resource/social changes at sites (e.g., crowding, resource degradation, conflict).
- look at visitation at selected sites.
- determine expenditure patterns.
- compare results to past ITRR Canyon Ferry Studies.

Methods

This study will be conducted by replicating past ITRR studies and administering surveys to visitors at the Canyon Ferry recreation sites using randomized sampling techniques.

Outcomes

The analysis will be written into a report to be used by communities, MT CVBs, regions, supporting agencies, and other promotional entities. 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>
\$6,720.00	\$43,331.30	\$50,051.30

Montana’s Outfitting Industry: Economic Impact and Industry-Client Analysis

Introduction

According to the ITRR 2018 Outfitting report, 5.4% of all visitors that had a guided or outfitted experience spent a total of \$791 million dollars, while in Montana, accounting for nearly a quarter of all visitor spending. Spending by visitor groups taking part in outfitted or guided experiences generates more than 16,000 jobs and nearly \$1.3 billion in economic output. In recent years, nonresident visitor spending on outfitters and guides has surpassed that of spending on retail goods, making it the fourth highest spending category behind only fuel, lodging, and dining out. This rise comes despite only five to six percent of the visiting population taking part in these activities. This observation reiterates findings from the 2007 & 2017 Montana Outfitter and Guide study characterizing the outfitting industry as high value, low impact.

[Montana Outfitters and Guides Association](#)

["Montana's Outfitting Industry - 2017 Economic Contribution and Industr" by Jeremy L. Sage, Carter Bermingham et al. \(umt.edu\)](#)

["Montana's Outfitting Industry: Economic Impact and Industry-Client Ana" by Norma P. Nickerson, Christine Oschell et al. \(umt.edu\)](#)

Purpose

The purpose of this study is to assess the current structure of the outfitting and guiding industry through an analysis of 1) the economic contribution of nonresident client expenditures, 2) industry supply and diversity of outfitted and guided experiences, and 3) a thorough characterization of the attributes of both the clients and outfitters within the industry, updating the 2006 and 2017 ITRR reports.

Objectives:

- To estimate the number of outfitters and guides working in the state of Montana across all outdoor recreation activities.
- To inventory the number, type, and duration of trips provided by outfitters and guides.
- To identify client demographics and outfitted trip characteristics.
- To estimate the economic contribution of the Montana outfitting/guiding industry on Montana's economy.
- To compare similarities and differences between the 2006, 2017, and 2023 outfitting industry and clients in Montana.

Methods

This study will be conducted by creating an online and mailback survey to distribute two primary data sources; the first is based on a survey of outfitting and guiding businesses, and the other draws from nonresident visitors who indicated they hired an outfitter or guide during their Montana visit as well as working with guides to share with their clients.

Outcomes

The analysis will be written into a report to be used by the outfitting industry, public and private landowners, organizations, MT CVBs, regions, supporting agencies, and other promotional entities. 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>
\$6,720.00	\$43,331.30	\$50,051.30

Understanding Tourist's Disengagement Influence on Montana Tourism

Introduction

Understanding the reasons behind tourists opting not to visit a location or reconsidering a revisit after a trip can assist in shaping a location's image, marketing, and services. Several studies indicate that if customers exhibit behaviors indicative of future non-visitation, it can result in the dissemination of negative experiences, potentially tarnishing the reputation of service providers like hotels and restaurants. Such behaviors wield a significant influence on the future marketing efforts of locations and businesses. Therefore, identifying the reasons for visitor disengagement can enhance the quality of experiences and services. Communities and businesses can proactively implement actions based on this understanding, to change the tourism experience or better align visitor expectations.

[Why Customers Don't Revisit in Tourism and Hospitality Industry? | IEEE Journals & Magazine | IEEE Xplore](#)

Purpose

The purpose of this research is to understand the dynamics of tourist disengagement within the context of Montana's tourism industry, aiming to comprehend the reasons behind tourists opting not to visit or reconsidering a revisit after a trip.

Objectives

- Identify and analyze the key factors contributing to tourist disengagement in Montana, exploring aspects such as negative experiences, dissatisfaction, and unmet expectations.
- Investigate the extent to which customer behaviors linked to non-visitation affect the future marketing strategies and efforts of locations and businesses within Montana's tourism sector.

Methods

This study will be conducted by purchasing a panel of one-time visitors as well as interviewing people who have never visited Montana for their perceptions.

Outcomes

The analysis will be written into a report to be used by communities, MT CVBs, regions, supporting agencies, and other partners. 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>
\$1,680.00	\$10,832.82	\$12,512.82

Travel Research Program Projects FY05-FY24

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	\$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	<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/ 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
