

FY20 University Travel Research Program

The projected bed tax revenue from the Governor’s budget estimates the FY20 Travel Research Program at \$930,000. The proposed projects for FY20 listed below total \$966,990. Budget savings from previous years of \$37,000 can be applied to FY20. The total dollars currently available for FY20, therefore are \$967,000.

The Governor appointed Tourism Advisory Council (TAC) approved the research projects for the Institute for Tourism and Recreation Research at their meeting in Helena. The following projects were first approved by the TAC Research Committee on January 24, 2019 followed by the full TAC on February 4, 2019.

FY20 Proposed Projects and Administration Budget

| | <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 |

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

Quarterly Nonresident and Resident Travel and Recreation Analysis

Introduction

In July 2009, ITRR began the nonresident visitor survey throughout the state. This on-going, high-value project provides the quarterly data which is uploaded into the report builder for anyone to use for marketing, policy, planning and presentations. It also provides the nonresident visitation numbers to Montana, spending data and economic impact of tourism to the state.

Purpose and Objectives

The main purposes of this project are to: 1) assess nonresident visitor characteristics on an on-going basis; 2) estimate nonresident visitor numbers quarterly; 3) estimate nonresident expenditures quarterly, and; 4) provide quarterly and yearly data on the report builder for users 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. The final purpose is to intercept residents (when nonresidents are not available) to ask custom questions that emerge as important tourism or recreation related topics.

Nonresident and Resident Visitor Study Objectives:

- Describe visitors to Montana in terms of demographics, trip characteristics, travel behavior, and expenditures in the state on a quarterly basis.
- Update information used in ITRR's model to estimate quarterly and annual visitation and economic impacts.
- Utilize existing survey personnel for niche market surveys and/or addressing 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 on-line 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 on-line. This additional data includes activities, sites visited, routes driven, attractions to the state, information sources used, and lodging type.
- 3) Supplemental surveys: methodology for niche markets or other research needs will either be on-site interviews, on-line 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 entered, cleaned, coded, and uploaded to the ITRR website interactive data tool for use by the public to produce their own summaries regarding nonresidents to MT.
- Economic impact of nonresident visitation to MT is generated from this data set on an annual basis (see next project description) while spending is estimated on a quarterly basis. Check with the office of Outdoor recreation to compare ITRR numbers with Outdoor Industry Association numbers. Get entities on the same page when describing these numbers
- Press releases and presentations will be part of the dissemination of the results.

Anticipated Timeframe: on-going

| | <u>Operating*</u> | <u>Salary/ Benefits</u> | <u>Total</u> |
|---|-------------------|-----------------------------|--------------|
| Quarterly Nonresident and Resident Travel and Recreation Analysis | \$90,325 | \$433,588 | \$523,913 |

2019 Economic Impacts and 2020 Outlook

Purpose and Objectives

The purpose of the study is to estimate annual nonresident visitation to Montana, the economic impact of visitors to Montana, and to project visitation for the year 2020. The objective is to get this information out to as many Montanans as possible through Economic Outlook Seminars (9 Montana cities), the 2020 Outlook article, the Governor's Conference on Tourism and Recreation, and other group events around the state.

Objectives:

- To estimate 2019 visitation through secondary data sources and ITRR nonresident data.
- To project 2020 tourism and recreation visitation numbers based on the ITRR projection model, statewide trend data, national projections, and indicator data from the state and region.
- To conduct the annual outlook survey to MT tourism business owners and operators.

Outcomes

The following information will be provided from this project:

1. The Tourism and Recreation Outlook 2020 will be presented with the Bureau of Business and Economic Research to nine cities in Montana (Helena, Great Falls, Missoula, Billings, Bozeman, Butte, Kalispell, Lewistown and Havre), and for other groups and conferences as requested.
2. The ITRR Travel Outlook article.
3. Preliminary 2019 economic and visitation figures, used by tourism related business and agencies for planning, will be available in early January 2020 and final numbers available in late May 2020.
4. Reports, press releases, presentations, and website updates will all be part of the information dissemination.

Anticipated Timeframe: On-going

| | <u>Operating*</u> | <u>Salary/ Benefits</u> | <u>Total</u> |
|--|-------------------|-----------------------------|--------------|
| 2019 Economic Impacts and 2020 Outlook | \$4,700 | \$58,453 | \$63,153 |

Tourism and Recreation Monitoring

Purpose and Objectives

The purpose of this project is to provide travel, tourism, and recreation trend data to the public through website updates and email summaries. Information and data for this project is a combination of primary data collection, secondary data, and reports from other entities.

Objectives include:

- Continually collect and update trend data on the ITRR interactive data web page to include: skier visits, airport deboardings, 3-5 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.
- Collect, summarize, and distribute regional and national tourism research information to Montana CVB's, travel regions and the MT Office of Tourism and Business Development as it becomes available.
- Starting in later 2019, monthly data generated from the nonresident intercepts will be posted for a sampling of current visitor demographics in Montana.

Outcomes

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

2. As new data becomes available, press releases will be written and disseminated around the state through UM news media.
3. TAC, Montana Office of Tourism and Business Development, regions, and CVB's will receive updates on travel trends in the region, nation, and international.

Anticipated Timeframe: On-going

| | <u>Operating</u> | <u>Salary/ Benefits</u> | <u>Total</u> |
|-----------------------------------|------------------|-----------------------------|--------------|
| Tourism and Recreation Monitoring | \$11,100 | \$18,256 | \$29,356 |

ITRR Data Mining

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
 - Look into the ability to gather a few years of data together so all counties can have a sheet related to the impact on their county
- Spending of airline travelers by MT airport
- Possible analysis of niche segments could include:
 - Travel maps of nonresident visitors
 - Comparison of travel characteristics by entry point
 - Offer our nonresident spending numbers to the state revenue department (or whomever makes estimates on a sales tax so they can use it for their model). Also talk to the MT Chamber of Commerce and get a copy of their recent study on sales tax analysis.
 - If we need more Eastern MT analysis, some of the funds here could go toward addressing those questions.

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, press releases, presentations, and website updates will all be part of the information dissemination.
2. Journal articles could be written and submitted for peer reviewed publications.

Anticipated Timeframe: on-going

| | <u>Operating*</u> | <u>Salary/ Benefits</u> | <u>Total</u> |
|------------------|-------------------|-----------------------------|--------------|
| ITRR Data Mining | \$0 | \$50,915 | \$50,915 |

Emerging Issues

In these constantly changing times with emerging issues that seem to pop up overnight (e.g., Yellowstone River closure; Aug. 2016; national park fee increase proposal, Nov. 2017; Glacier wildfire August 2018; government shutdown Dec. 2018), it is imperative that up-to-date data is collected, analyzed, and dispersed so the public can make informed decisions

related to policy, marketing, or management. A fund set aside for these types of projects allows for reactions to emerging issues.

Purpose

The purpose of this project is to respond to emerging national, regional, or state-wide issues that create or potentially create instability or opportunities in the tourism economy.

Methods

Two selection methods will be used to identify suitable cases qualifying as emerging issues:

- Issues identified by ITRR and the Dean of the W.A. Franke College of Forestry and Conservation will be vetted with experts in the college, then ITRR will inform the research committee and the TAC of the project to be undertaken.
- Issues identified by industry personnel (TAC, Office of Tourism and Business Development, Regions, CVB’s, businesses or land managers), will be brought to ITRR. ITRR will write up a formal statement of the issue and the methods to be used, and then contact the TAC research committee and the Dean for approval.

Data collection methods will be determined by the type of project. ITRR’s field survey personnel could be utilized to ask visitors and residents about the issue or ITRR’s panel survey could reach beyond current visitors for data.

Outcomes

1. Reports, press releases, presentations, and website updates will all be part of the information dissemination.
2. Journal articles will be written and submitted for publication if appropriate.

Anticipated Timeframe: Ongoing

| | <u>Operating</u> | <u>Salary/ benefits</u> | <u>Total</u> |
|-----------------|------------------|-----------------------------|--------------|
| Emerging Issues | \$0 | \$23,318 | \$23,318 |

Note: during the Research Committee discussion of projects, it was mentioned that a current emerging issue is the impact of the Government Shutdown on potential tourism in the summer. Anecdotally some rafting guides are hearing that people are already not planning a vacation for this summer.

Survey Kits

Purpose and Objectives

The purpose of the survey kit is to assist communities, organizations or event managers in research about their visitors in terms of characteristics, satisfaction, and spending. In FY20 like in FY19, five communities will be chosen for the community surveys free of charge. Communities or organizations that desire an event survey will continue to be charged between \$500 and \$1,000.

Methods

Survey collection methods are determined by the type of event to be researched. The methods range from email surveys to intercept surveys but in all instances (other than readily available emails), volunteers are used to collect data for that community or event. ITRR directs the volunteers on valid data collection techniques, enters data, cleans data, and writes the report.

Outcomes

1. Five communities will be selected to get surveys completed for their community. This is a repeat from FY19 when more than five communities showed interest. (Bigfork, Libby, and Glasgow will be given the first opportunity to participate since they missed out in FY19).
2. An estimated four to seven and 7 survey kits will be conducted for events around the state depending on the requests ITRR receives for the studies.
3. Five additional community/event surveys will be conducted and paid for by MOTBD.

4. A short report is written for the community or organization describing the visitor characteristics, satisfaction of the event and spending by visitors.
5. If a total count of participants is obtainable, the total dollar contribution of the event can be assessed.

Anticipated Timeframe: on-going

| | <u>Operating</u> | <u>Salary/ benefits</u> | <u>Total</u> |
|------------|------------------|-----------------------------|--------------|
| Survey kit | \$0 | \$14,384 | \$14,384 |

ITRR Interactive Website Upgrade

Introduction

The current interactive website for ITRR is in need of improved data visualization functionality and flexibility for the tourism industry and the public to have valid sample sizes, easy access, and as current of data as possible. The research committee discussed many issues about data that ultimately pointed to the need to update the interactive website options so as to provide small, less visited areas with visitor data.

Upon discussions with Katelyn Schaub, *Business Intelligence Technical Lead* with SITSD/Montana Department of Administration, ITRR will be allowed to utilize the State’s existing contract with Tableau, a data visualization software that is used for data science and business intelligence. Tableau comes with tools that can drill down data which allows individuals to see and understand the data from a visual format.

The new interactive component will provide the following in addition to what is already available:

1. The ability to select data from multiple years to ensure that an adequate sample size is available to the user.
2. Visitor characteristics compared from year to year by location, sites visited, and overnight locations.
3. Maps with routes taken throughout the state which could be selected by overnight stays or if they drove through a particular community of interest.
4. Preliminary monthly or biweekly updates of nonresident visitor intercept questions which include entry point, group size, purpose of trip, where from, entry point, first time vs repeat visitors, travel mode into MT, nights to be spent, if they rented a car, went to a farmers market, took a guided trip in the last 24 hours, and the types of items they spent money on in the past 24 hours.
5. Map based visualization of all data with a geographic attribute (e.g. State of residence, location of overnight stay)

Purpose and Objectives

The purpose of the revamped interactive website is to provide the state as well as small and large communities with valid data about visitors to their area.

Objectives

- To provide ample sample sizes for eastern Montana and small communities statewide for their own analysis and decision making regarding marketing, infrastructure development, or planning purposes.
- To allow for year-to-year comparisons regarding visitor characteristics.
- To enhance the data visualization qualities and downloading abilities of the interactive portion of ITRR website.

Website Design and Upkeep

ITRR will hire a data analyst to set up and monitor the Tableau site with all the ITRR data available for public use. This new employee will spend the first year focusing on the ITRR website’s interactive data function. In addition, this individual will have experience in big data analysis to allow ITRR further analysis of our data sets and other data publically available as it relates to Montana travel and recreation.

Anticipated Timeframe: on going

| | <u>Operating</u> | <u>Salary/ benefits</u> | <u>Total</u> |
|----------------------------------|------------------|-------------------------|--------------|
| ITRR Interactive Website Upgrade | \$8,950 | \$112,270 | \$121,220 |

Eastern Montana Data Growth

Over the past few years visitation to Eastern Montana has been on a decline as noticed by hoteliers and others in the tourism industry on the eastern side of the state. Many factors contribute to this decline including the reduction in the Bakken oil fields, Canadian exchange rate, and changes in marketing strategies. In addition, ITRR has had difficulty retaining surveyors in the Billings area contributing to reduction in data to assist us in understanding the localized travel issues in Eastern Montana. Therefore, the TAC Research Committee asked ITRR to enhance both their data collection and use of the interactive website so that those with lower sample sizes can have them increased to a useable and valid number for decision making.

Purpose and Objectives

The purpose of this project is to provide Eastern Montana, and in turn, the entire state, with more robust sample sizes of the nonresident data collected year-round by ITRR.

Methods

This is not a single project, but part of many projects: Quarterly Nonresident study, Interactive Website project, and in part the Canadian Traveler analysis. Our methods include:

1. Hire an additional Eastern MT surveyor. We will have one surveyor based in Glasgow, one in Glendive, and one in Billings. In addition, our Shelby surveyor collects data along the highline. These surveyors cover areas including Columbus, Red Lodge, Billings, Lodge Grass, Broadus, Miles City, Glendive, Wibaux, Sidney, Plentywood, Wolf Point, Glasgow, and Malta.
2. Update the interactive website so that the data can be selected by multiple years. By doing this, sample sizes per location will increase, allowing for a valid assessment of visitors to the less visited areas.
3. Update the interactive website to be able to look at routes taken by nonresident visitors.
4. ITRR will work with motels in Eastern MT with the concept of a travel/satisfaction survey sent to their guests after leaving the hotel. This could enhance the understanding of who is staying overnight in motels in the area and their travel patterns in Montana. The Best Western Clock Tower Inn in Billings will be the test hotel. Upon refinement of the survey and methods, and with help from the accommodation industry in eastern Montana, other motels will be set up to also collect data from their guests.

Outcomes

1. This “project” will produce larger sample sizes for small communities on our interactive website for use in marketing, planning, and other decision making related to tourism.
2. More data and better ways to look at the data will be provided both through the additional surveyor and the additions to the website.

Anticipated Timeframe: July 1, 2019 – June 30, 2020

| | <u>Operating</u> | <u>Salary/ benefits</u> | <u>Total</u> |
|-----------------------------|------------------|-------------------------|--------------|
| Eastern Montana Data Growth | \$900 | \$30,365 | \$31,265 |

Note: The Billings accommodation data will be compared with the data Destination Analysts has for Billings as a check on validity.

Canadian Traveler Analysis

Canadian visitors to parts of Montana (the highline and eastern Montana in particular) have decreased in numbers and presumably their travels characteristics have changed over the years according to tourism industry folks in the affected areas. It has always been true that visitation and spending decreases by Canadians when the exchange rate is unfavorable to them. However, it is unknown if other factors are involved in these observed changes. This study will look at characteristics of Canadian travelers through data mining and literature reviews.

Purpose and Objectives

The purpose of this project is to further our understanding and changes in the Canadian visitor to Montana.

Methods

First, ITRR will conduct a literature review on Canadian travelers to the United States to comprehend what is being studied and written about these travelers. Once this is complete and written into a review report, ITRR will send it to the Research Committee for review. At that point the committee will discuss what we know and don't know about the Canadian visitor to help guide us into further study of this market.

Second, ITRR will mine the all nonresident visitor data from available years to assess if there have been any identifiable changes in Canadian travel to Montana.

Finally, if needed, ITRR will conduct an online survey of Canadians who are participants in our panel research.

Outcomes

3. A report highlighting changes in visitation, changes in US/Canada relationships, and any changes detected over the years by Canadian visitors to Montana.

Anticipated Timeframe: on-going

| | <u>Operating</u> | <u>Salary/ benefits</u> | <u>Total</u> |
|----------------------------|------------------|-----------------------------|--------------|
| Canadian Traveler Analysis | \$500 | \$23,318 | \$23,818 |

Note: If a survey is needed to find out more about the Canadian visitor, one area of interest to inquire about is their interest in flying straight into Montana. If available, would they take advantage of that service?

Travel Research Program Projects FY05-FY19

FY19 Proposed Projects and Administration Budget

| <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 |
| <hr/> | | | |
| <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 2018 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 | \$9,500 | \$29,097 | \$38,597 |

After

| | | | |
|-----------------------|------------------|------------------|------------------|
| 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 Approved | <u>\$150,252</u> | <u>\$596,914</u> | <u>\$767,461</u> |

FY13

| Approved | <u>Operating</u> | <u>Salary/ Benefits</u> | <u>Total</u> |
|---|-------------------------|--------------------------------|---------------------|
| 2012 Economic Impacts and 2013 Outlook | \$400 | \$38,510 | \$38,910 |
| Tourism and Recreation Monitoring | \$16,800 | \$20,370 | \$37,170 |
| Data Mining of ITRR data sets | \$0 | \$30,000 | \$30,000 |
| Quarterly Nonresident Visitor Study | \$79,000 | \$162,500 | \$241,500 |
| MT tourism job analysis | \$8,000 | \$48,200 | \$56,200 |
| Economic impact of the Beartooth Highway* | \$52,330 | \$86,875 | \$139,205 |
| Connection between wildlands and nonresident visitors | \$0 | \$10,435 | \$10,435 |
| Economic impact by counties | \$3,000 | \$11,300 | \$14,300 |
| Case studies: impact of small town hotels on rural MT | <u>\$5,940</u> | <u>\$41,200</u> | <u>\$47,140</u> |
| Total Projects | \$165,470 | \$449,390 | \$614,860 |
| Administration | <u>\$24,430</u> | <u>\$18,140</u> | <u>\$42,570</u> |
| Total Project and Admin. Budget | \$189,900 | \$467,430 | \$657,430 |

*\$50,000 approved by TAC. Remaining provided by Friends of the Beartooth

FY12

| | <u>Operating*</u> | <u>Salary/ Benefits</u> | <u>Total</u> |
|---|--------------------------|--------------------------------|---------------------|
| 2011 Economic Impacts and 2012 Outlook | \$400 | \$33,380 | \$33,780 |
| Monitoring Tourism and Recreation | \$14,050 | \$18,640 | \$32,690 |
| Data Mining of ITRR data sets | \$0 | \$31,610 | \$31,610 |
| Quarterly Nonresident Visitor Analysis | \$53,375 | \$175,540 | \$228,915 |
| Geotourists in shoulder and winter seasons | \$0 | \$14,760 | \$14,760 |
| Geotourism mapguides – do they work? | \$1,000 | \$23,000 | \$24,000 |
| Resident in-state vacation characteristics | \$3,875 | \$38,300 | \$42,175 |
| Why do Nonresidents fly into airports outside of Montana? | \$0 | \$10,900 | \$10,900 |
| Total Projects | \$72,700 | \$346,130 | \$418,830 |
| Administration | \$24,130 | \$32,910 | \$57,040 |
| Total Possible Project and Admin. Budget | \$96,830 | \$379,040 | \$475,870 |

FY11

| | <u>Operating*</u> | <u>Salary/ Benefits</u> | <u>Total</u> |
|--|--------------------------|--------------------------------|---------------------|
| 2010 Economic Impacts and 2011 Outlook | \$3,300 | \$22,000 | \$25,300 |
| Monitoring Tourism in Montana & Beyond | \$11,920 | \$30,000 | \$41,920 |
| Data Mining of ITRR data sets | \$0 | \$13,540 | \$13,540 |
| Quarterly Nonresident Visitor Analysis | \$46,910 | \$216,835 | \$263,745 |
| Montana Accommodations: Establishing a Visitation Reporting System | \$1,000 | \$23,405 | \$24,405 |

| | | | |
|---|------------------------|-----------------------|-----------------------|
| Elected officials Attitudes Toward MT Tourism Charter | 1,020 | \$5,000 | \$6,020 |
| Literature Review on the Effects of Climate Change on Tourism | \$0 | \$2,600 | \$2,600 |
| Total Project | <u>\$64,150</u> | <u>313,380</u> | <u>377,530</u> |
| 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 | <u>\$75,071</u> | <u>\$328,808</u> | <u>\$403,879</u> |
| Administration | \$35,000 | \$28,370 | \$63,370 |
| Total Possible Project and Admin. Budget | <u>\$110,071</u> | <u>\$357,178</u> | <u>\$467,249</u> |

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 |
