



Voices of Montana Tourism

The Value of Tourism For Missoula and Montana

Missoula

September 25, 2020



Education & Outreach

How Voices Tells the Story

- Social Media
- Public Relations
- Digital Marketing
- Industry Collaboration
- Community Presentations
- Business Education Roundtables





Education & Outreach

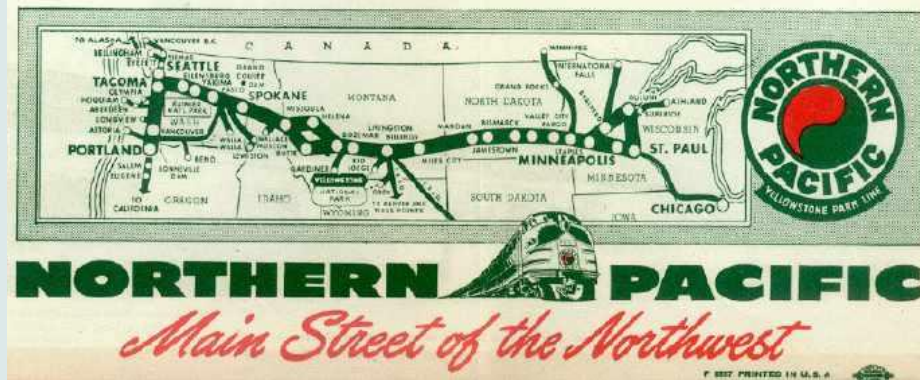
- Montana's Model
- Economic Update
- COVID-19 Impact



JOBS - COMMUNITY - ECONOMY



History of Tourism in Montana



VOICES OF
MONTANA TOURISM
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Travel Marketing and Promotion

PRODUCTS COMMERCIAL BRAND
MARKETING ADVERTISING SERVICE
ADVERTISEMENTS
PROMOTION
PRODUCT RESEARCH TELEVISION
INTERNET MEDIA
CAMPAIGN SOCIAL MEDIA MESSAGE
SPONSORSHIPS RADIO
BRANDING INCENTIVES

Increased Visitor Trips



TRAVEL PROMOTION'S VIRTUOUS CYCLE



New Jobs & Tax Revenues

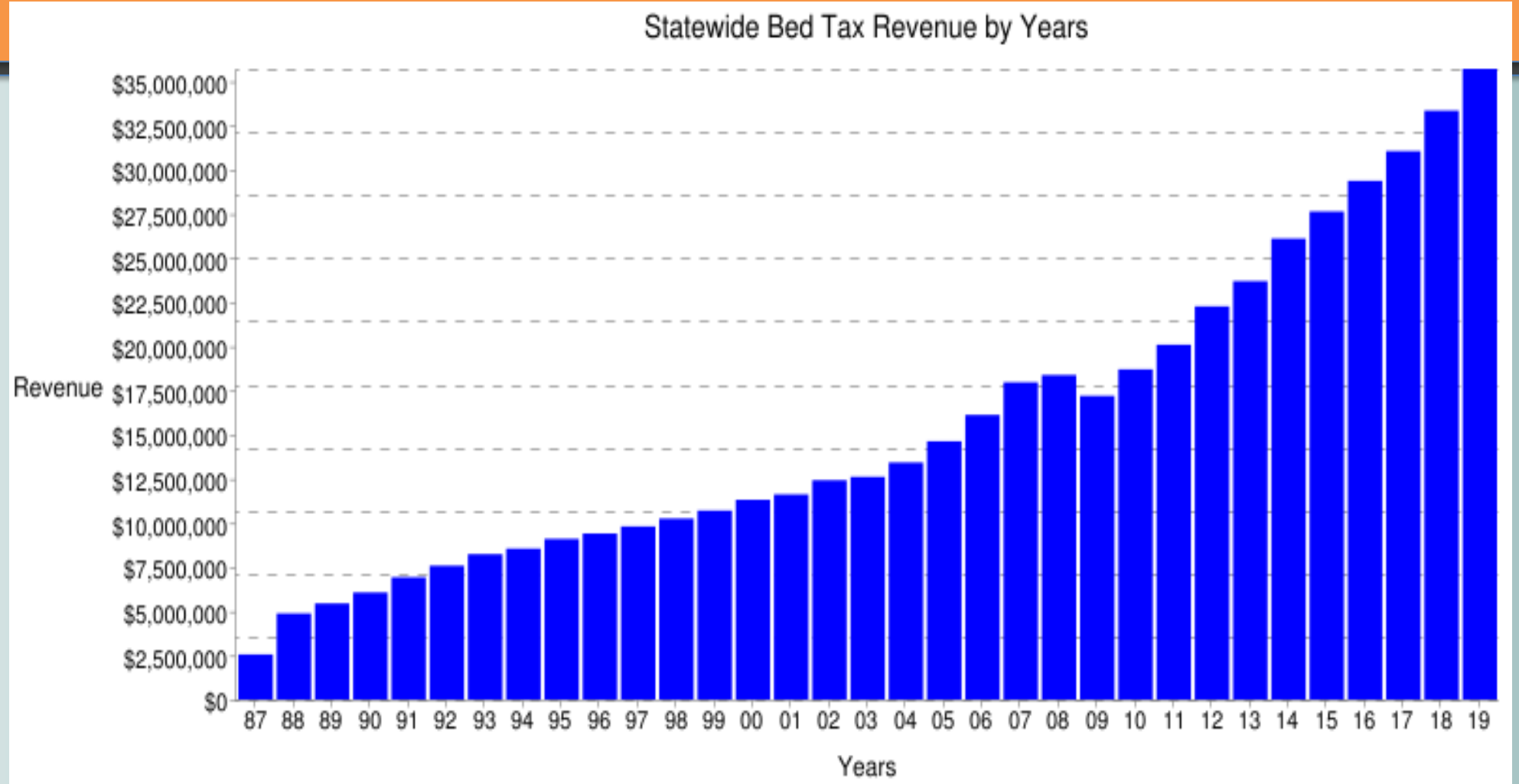


Additional Visitor Spending

U.S. TRAVEL
ASSOCIATION



MT Bed Tax History





Funding Sources

3% Bed Sales Tax

\$25.2 Million General Fund

4% Lodging Use Tax

\$33.6 Million State Programs

1% Bed Sales Tax

\$8.4 Historical Assets

FY19
Revenues

January 1, 2020

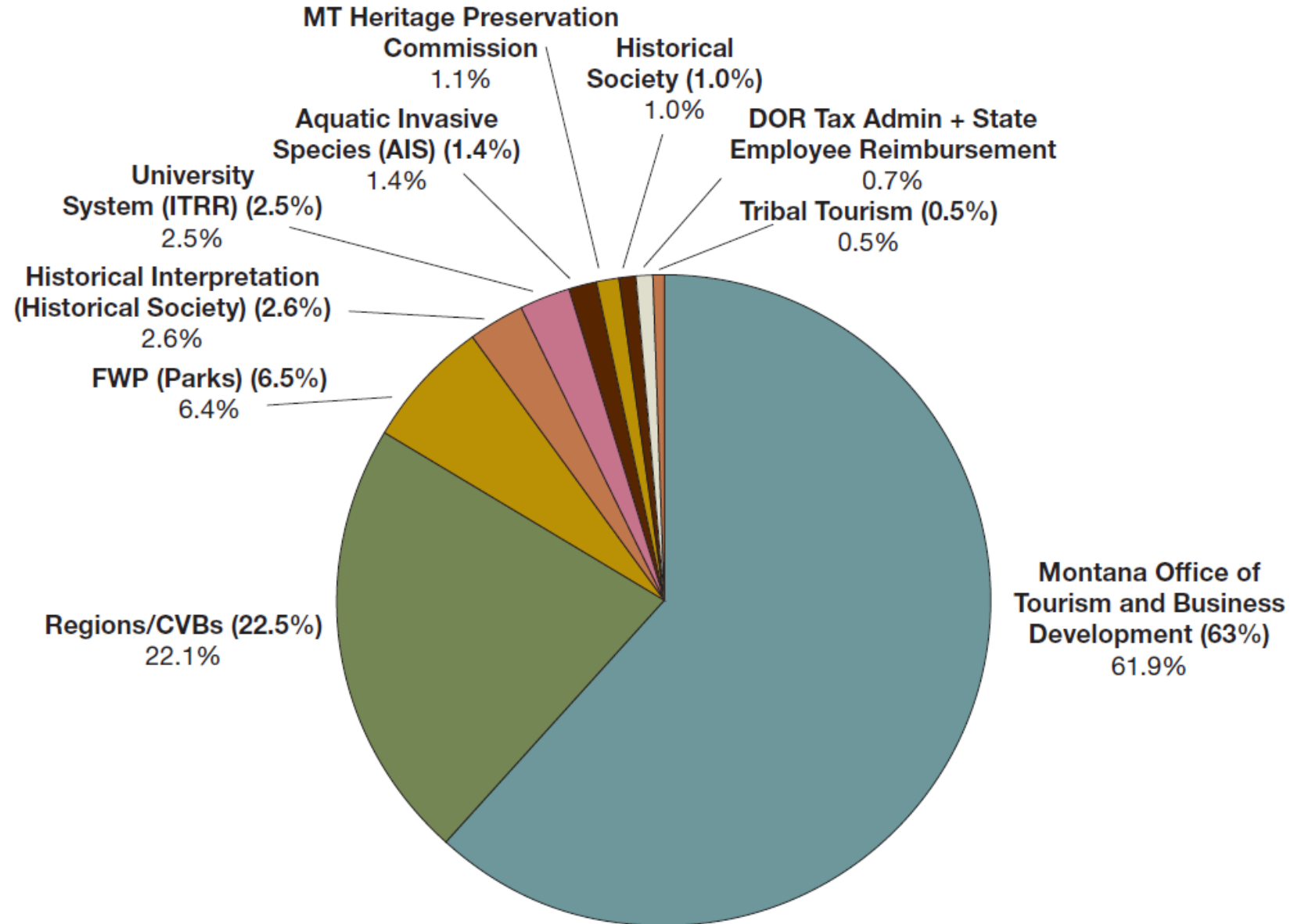




Montana Promotion Funding



DISTRIBUTION OF 4% LODGING FACILITY USE TAX*





Return On Investments

Tourism is a leading industry in Montana

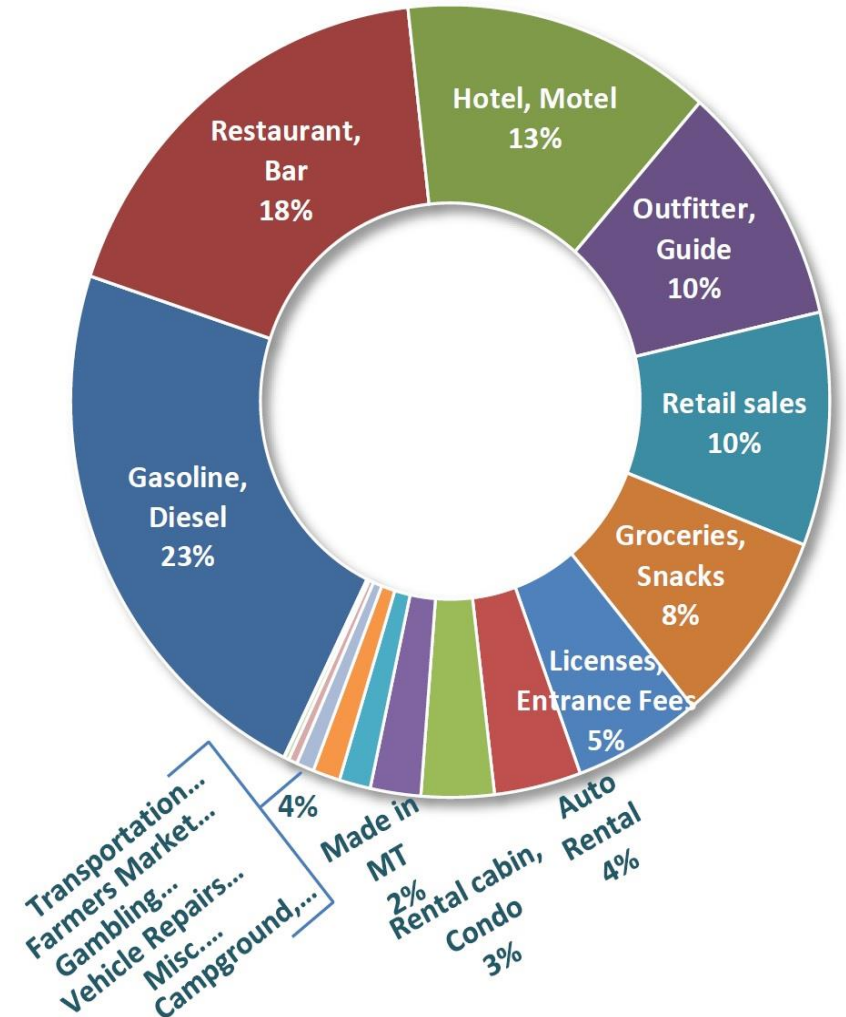
In 2019, **12.6 million** non-resident visitors:
spent **\$3.76 Billion**,

- supported **53,120 jobs** statewide - **\$1.5 billion** in salaries,
- generated **\$265 million** in state & local taxes and
- lowered taxes on each Montana household by over **\$626.00**

* Data is based on final spending report by ITRR released May 2020

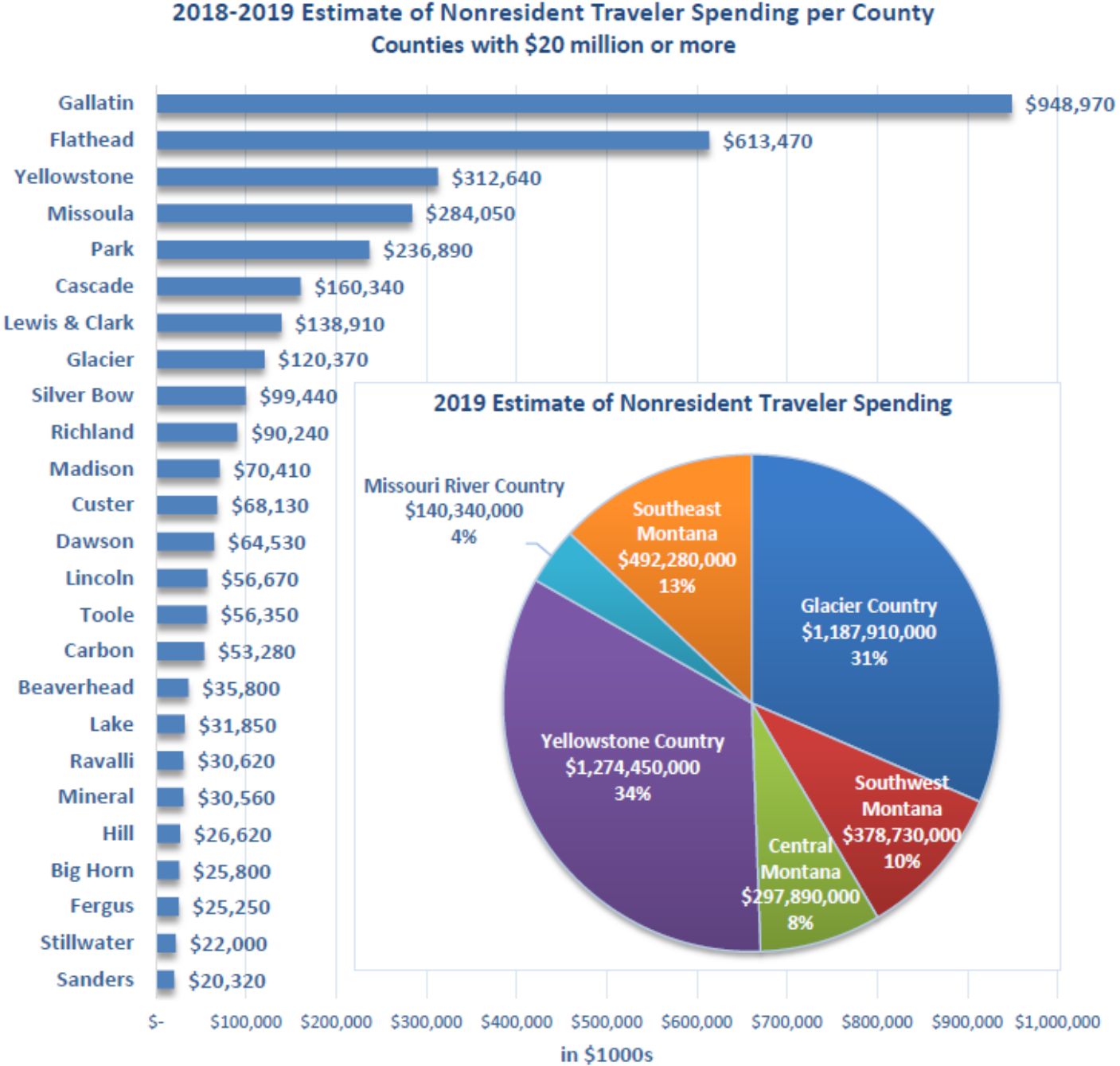
Expenditure Category	Average Daily Per Group ^{2,3}	Allocation by Category	Total Expenditures ^{2,4}
Gasoline, Diesel	\$34.49	23%	\$860,770,000
Restaurant, Bar	\$27.55	18%	\$681,020,000
Hotel, Motel	\$20.09	13%	\$496,440,000
Outfitter, Guide	\$15.30	10%	\$375,160,000
Retail sales	\$14.39	10%	\$357,820,000
Groceries, Snacks	\$12.21	8%	\$303,760,000
Licenses, Entrance Fees	\$8.85	5%	\$204,990,000
Auto Rental	\$5.67	4%	\$139,120,000
Rental cabin, Condo	\$4.90	3%	\$116,700,000
Made in MT	\$3.26	2%	\$80,840,000
Campground, RV Park	\$1.99	1%	\$50,110,000
Misc. Services	\$1.81	1%	\$43,500,000
Vehicle Repairs	\$1.12	1%	\$28,300,000
Gambling	\$0.57	<1%	\$14,200,000
Farmers Market	\$0.30	<1%	\$7,290,000
Transportation Fares	\$0.04	<1%	\$860,000
Estimated Total	\$152.54		\$3,760,880,000

2019 Expenditure Allocation by Category



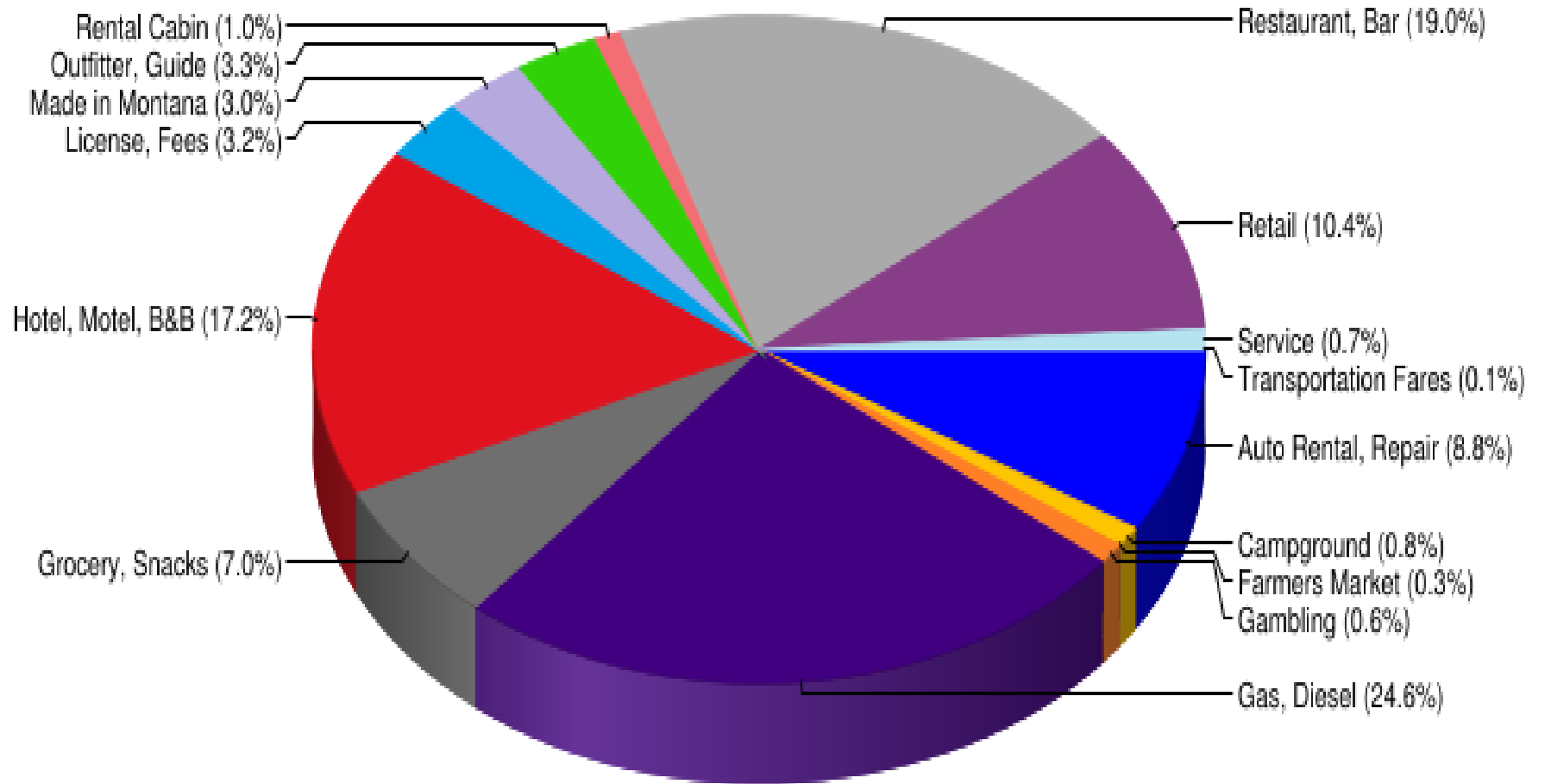


Nonresident spend per county



Spend 2019

2019 Nonresident Expenditures % for Missoula County: \$284,050,000





Montana Bed Tax Collections

	<u>2017</u>		<u>2018</u>		<u>2019</u>		<u>2020</u>	
1/1 - 3/31	\$4,835,801	(+7%)	\$5,230,432	(+8%)	\$6,235,796	(+19%)	\$5,816,128	(-7%)
4/1 - 6/30	\$7,789,563	(+6%)	\$8,357,510	(+7%)	\$9,116,969	(+9%)	\$3,884,681	(-57%)
7/1 - 9/30	\$13,902,846	(+6%)	\$14,609,488	(+5%)	\$15,502,685	(+6%)	\$0	(+0%)
10/1 - 12/31	\$4,520,887	(+3%)	\$5,195,857	(+15%)	\$5,381,609	(+4%)	\$0	(+0%)
Total:	\$31,049,098	(+6%)	\$33,393,287	(+8%)	\$36,237,060	(+9%)	\$9,700,809	(-37%)



Missoula County Bed Tax Collections

	<u>2017</u>			<u>2018</u>			<u>2019</u>			<u>2020</u>	
1/1 - 3/31	\$374,189	(+8%)		\$376,881	(+1%)		\$389,322	(+3%)		\$368,271	(-5%)
4/1 - 6/30	\$723,953	(+8%)		\$787,016	(+9%)		\$840,515	(+7%)		\$273,966	(-67%)
7/1 - 9/30	\$1,078,985	(+18%)		\$1,123,445	(+4%)		\$1,113,273	(-1%)		\$0	(+0%)
10/1 -12/31	\$457,660	(+6%)		\$502,786	(+10%)		\$501,667	(-0%)		\$0	(+0%)
Total:	\$2,634,788	(+11%)		\$2,790,128	(+6%)		\$2,844,777	(+2%)		\$642,237	(-48%)




In Review

- Montana's existing model funds promotion without requiring general fund allocations
- There is a measurable ROI at the state, regional and local level
- Main Street businesses thrive when visitors contribute economically, bringing in new dollars to circulate in MT.




Team Tourism



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Tourism Fuels Our Economy

Visitors Spend over \$3 Billion Annually


Every day, non-resident visitors spend nearly \$11 million dollars in Montana on average – sending a positive ripple effect through our economy and generating over \$180 million in state & local tax revenues. Each household in the state would have to spend over \$426 more per year to have the same impact.

Photo: Glacier National Park courtesy of Tla'Toyi/Glacier Country Tourism

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Supporting Tourism – a Leading Montana Industry

As a leading industry in Montana, non-resident tourism supports 47,560 local jobs, adds over \$3 billion to the economy annually, and contributes to the preservation of historical, cultural and recreational treasures. Voices of Montana Tourism exists to educate audiences on the importance of tourism promotion funding—which comes from a lodging tax paid by overnight guests. In a competitive marketplace, travelers have many options; Montana cannot take its success for granted.



Upcoming Events

MT Chamber Business Days
January 10-11, 2018 – Helena

Tourism Advisory Council Meeting
April 2018 – Big Sky

Gov Conference on Tourism & Recreation
April 15-17, 2018 – Big Sky

National Travel and Tourism Week
May 8-12, 2018

Tourism Advisory Council Meeting
June 11-12, 2018 – Helena

MT Lodging & Hospitality Fall Meeting
Oct. 22-24, 2018 – Butte

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Latest News

Dec 21 – Year in Review for Montana Tourism Industry

Aug 14 – Commerce Reports Int'l Visitors Spent \$245 Billion in 2015

Jul 28 – Attacks on State Tourism Promotion Don't Add Up

Jun 28 – Record Number of Americans to Travel this Independence Day

Apr 26 – Celebrate National Travel & Tourism Week

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Thank you!

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Monthly emails



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