



# Voices of Montana Tourism

## The Value of the Visitor

Fall 2022



# Education & Outreach

## How Voices Tells the Story

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





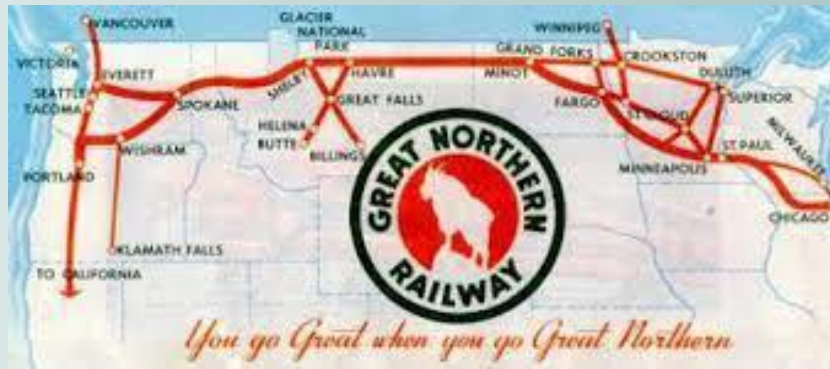
# Agenda

- Montana's Story in Travel & Tourism
- Economic Updates
- Local Tourism Experts
- Legislative Introductions
- Q&A





# History of Tourism in Montana



VOICES OF  
MONTANA TOURISM  
JOBS. COMMUNITY. ECONOMY.

## 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

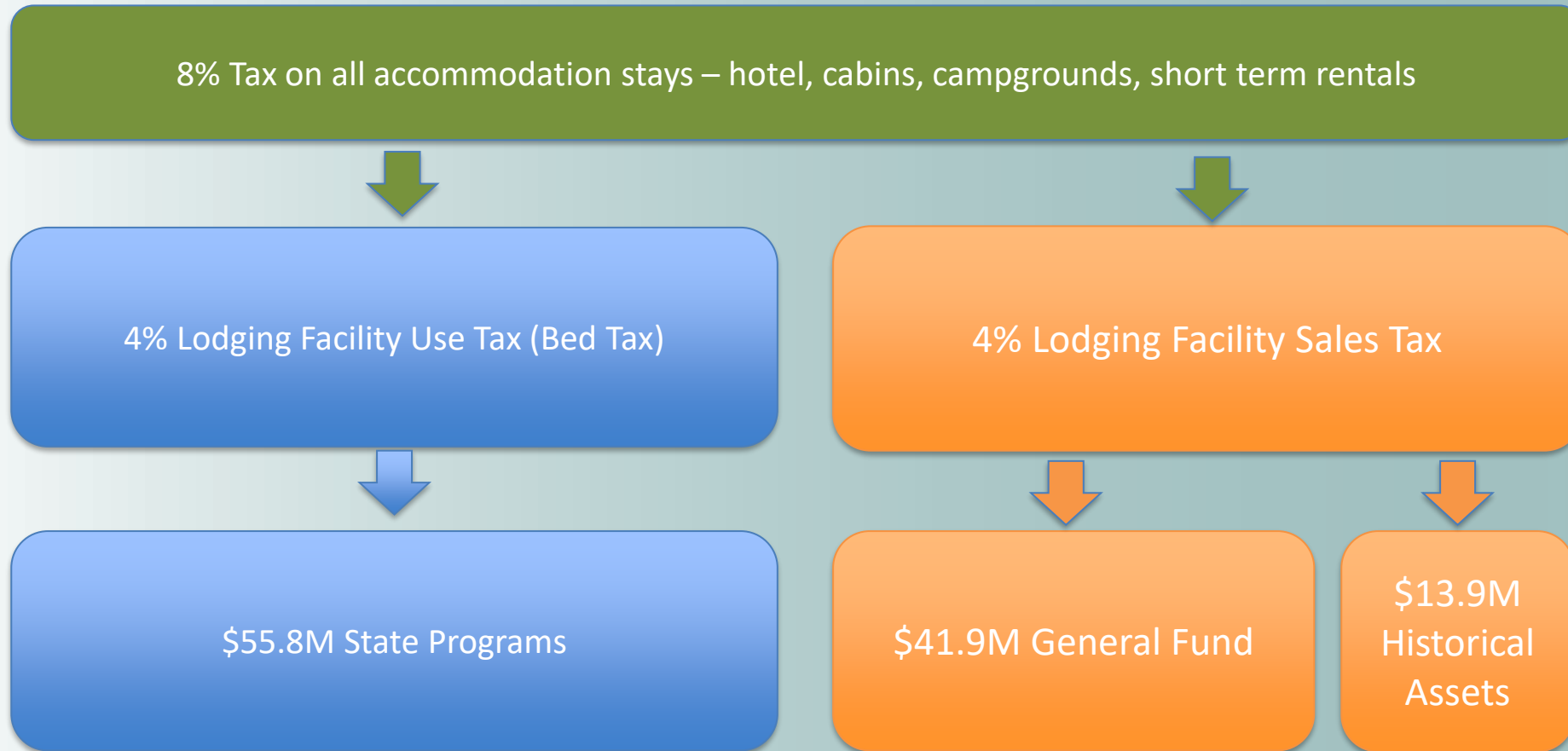


## Additional Visitor Spending

U.S. TRAVEL  
ASSOCIATION

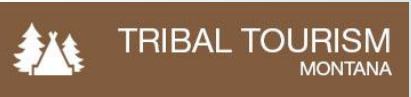


# Funding Sources

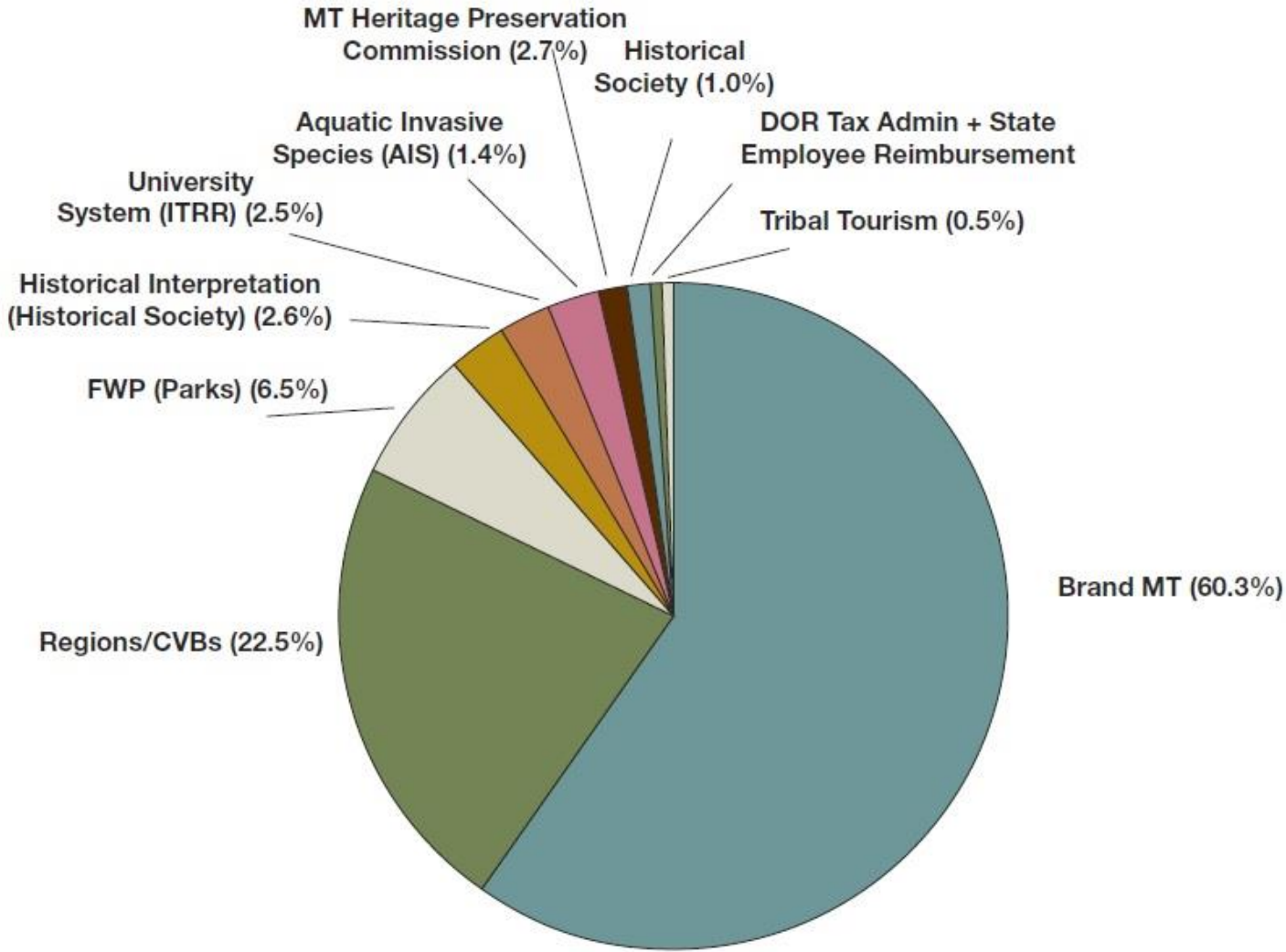


FY22  
Revenues





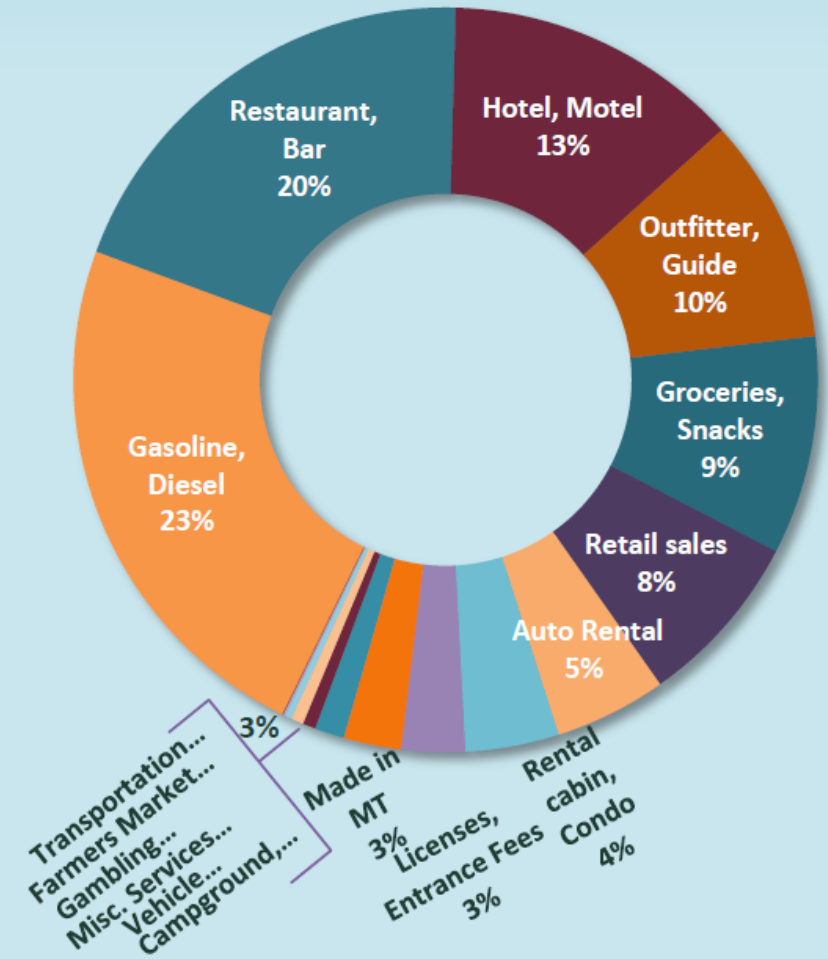
## DISTRIBUTION OF 4% LODGING FACILITY USE TAX\*



**Table 1 - 2021 Nonresident Traveler Expenditures<sup>1</sup>**

Expenditure Category	Average Daily Per Group <sup>2,3</sup>	Allocation by Category	Total Expenditures <sup>2,4</sup>
Gasoline, Diesel	\$41.43	23%	\$1,204,670,000
Restaurant, Bar	\$35.20	20%	\$1,021,820,000
Hotel, Motel	\$22.83	13%	\$663,160,000
Outfitter, Guide	\$17.62	10%	\$506,100,000
Groceries, Snacks	\$16.88	9%	\$489,030,000
Retail sales	\$13.43	8%	\$392,110,000
Auto Rental	\$8.67	5%	\$250,110,000
Rental cabin, Condo	\$7.19	4%	\$209,670,000
Licenses, Entrance Fees	\$4.77	3%	\$142,240,000
Made in MT	\$4.42	3%	\$128,900,000
Campground, RV Park	\$2.34	1%	\$66,290,000
Vehicle Repairs	\$1.01	1%	\$28,920,000
Misc. Services	\$0.95	1%	\$27,560,000
Gambling	\$0.52	<1%	\$15,270,000
Farmers Market	\$0.17	<1%	\$4,860,000
Transportation Fares	\$0.04	<1%	\$1,220,000
<b>Estimated Total</b>	<b>\$177.46</b>		<b>\$5,151,930,000</b>

**2021 Expenditure Allocation by Category**

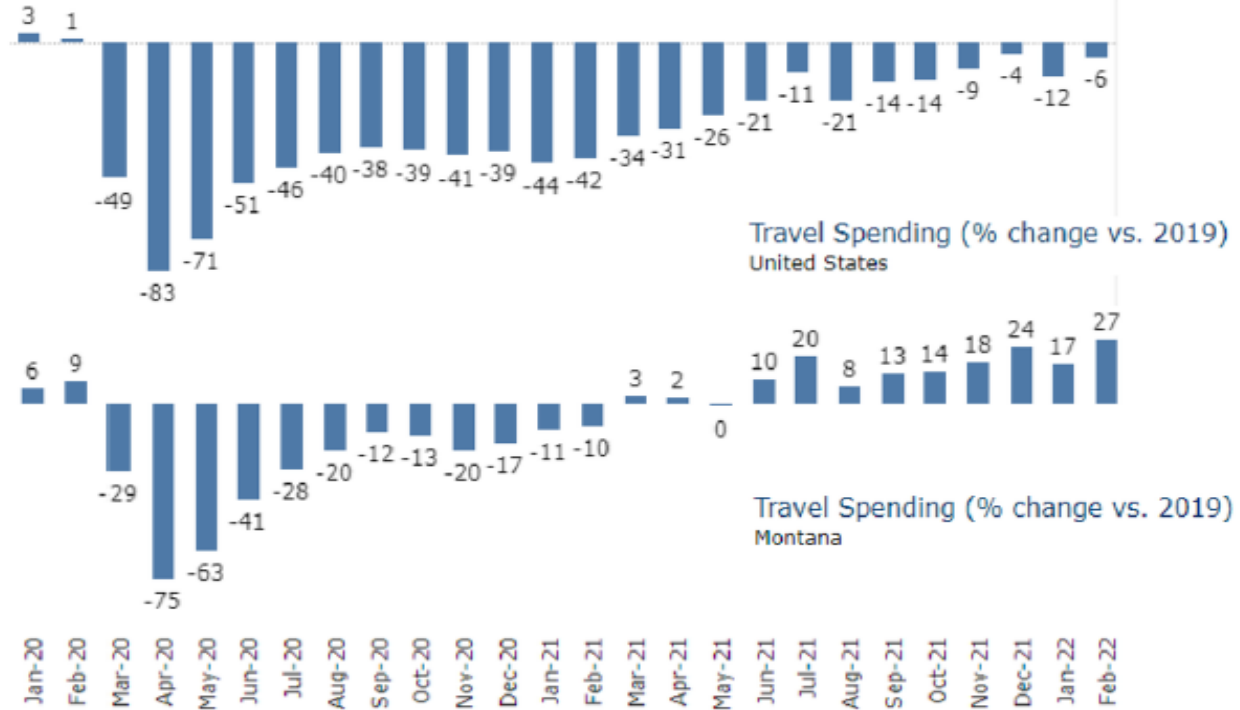






# Comparative Spend Effects of Pandemic

## U.S. Travel Spending vs Montana Travel Spending



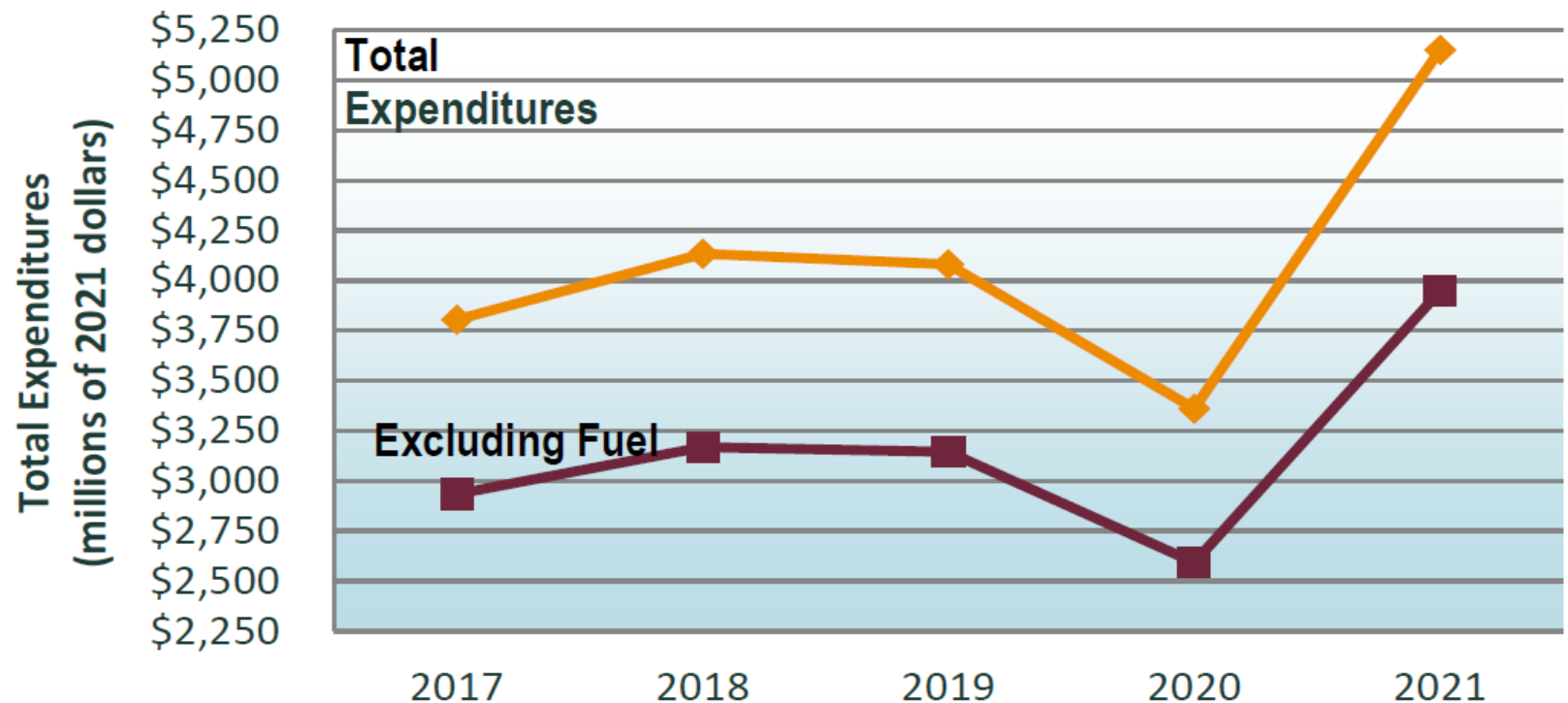
Source: U.S. Travel Association and Tourism Economics



# 5 Year Comparative Spend - MT

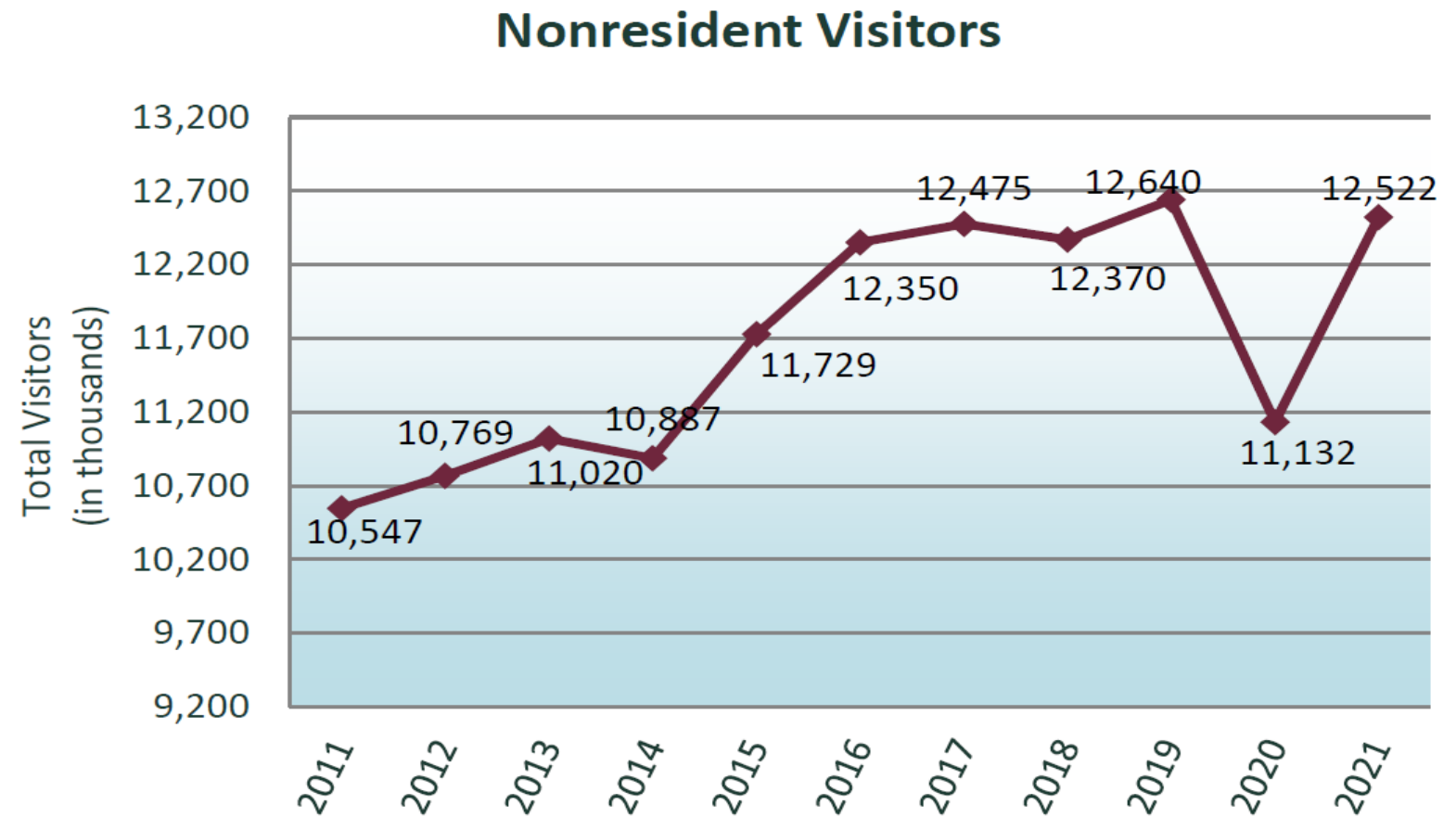
INSTITUTE FOR  
**TOURISM & RECREATION RESEARCH**  
UNIVERSITY OF MONTANA

## Total Inflation-Adjusted Expenditures





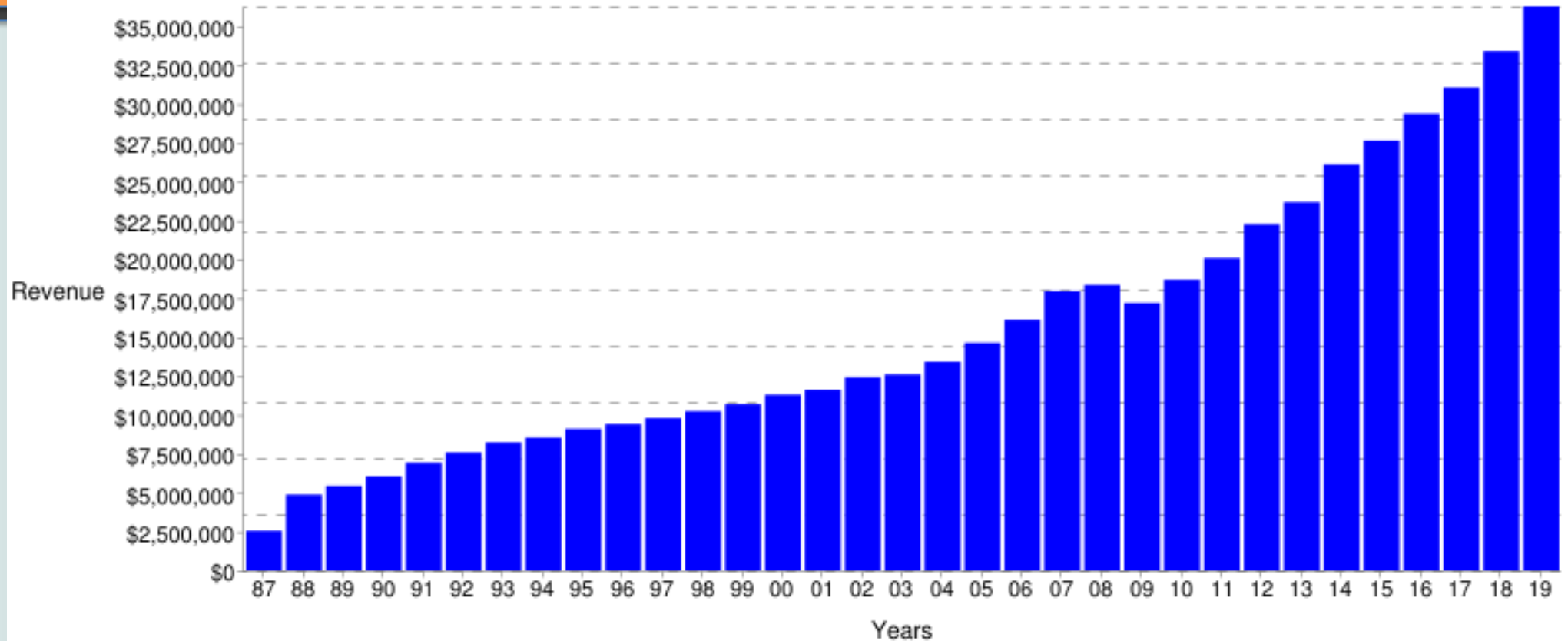
# 10 Year Comparative Visitation



# MT Bed Tax History Pre-Pandemic



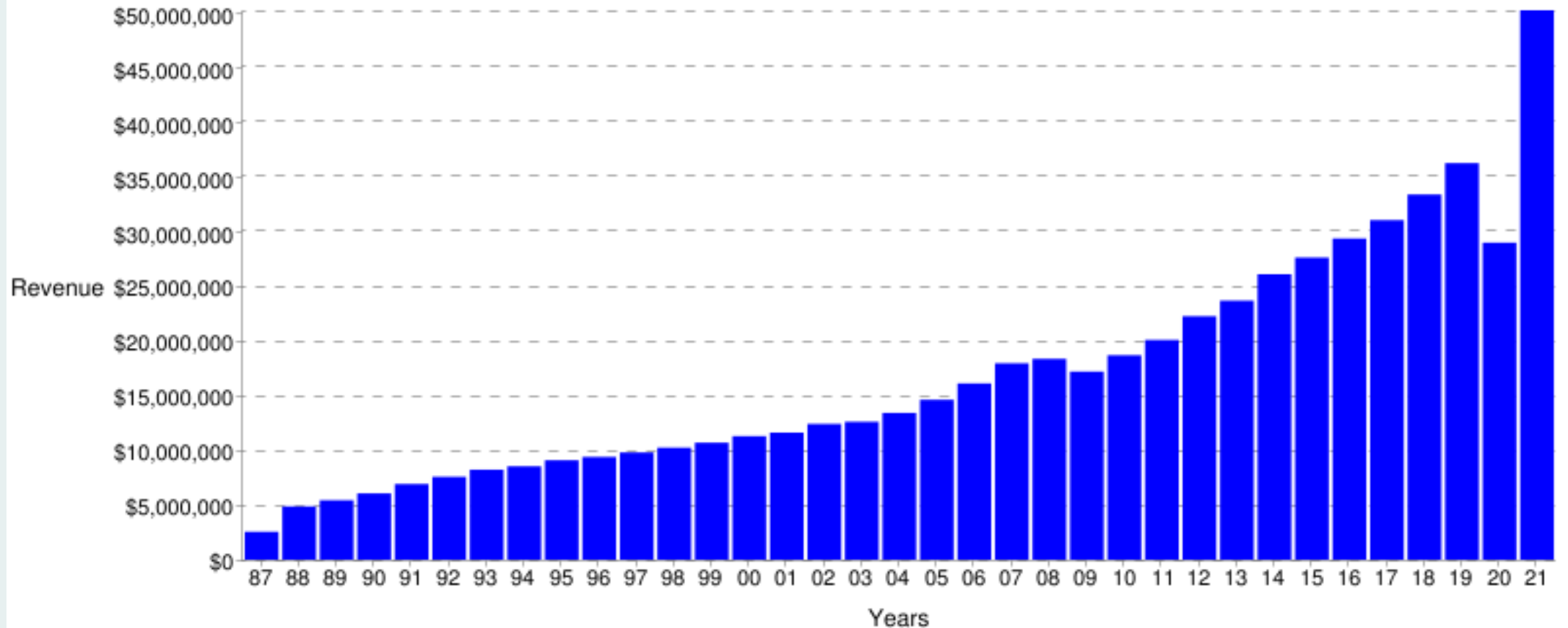
Statewide Bed Tax Revenue by Years





# MT Bed Tax History

Statewide Bed Tax Revenue by Years



# Measuring Travel as Export

U.S. Travel Association







# Return On Investments

**Tourism** is a leading industry in Montana

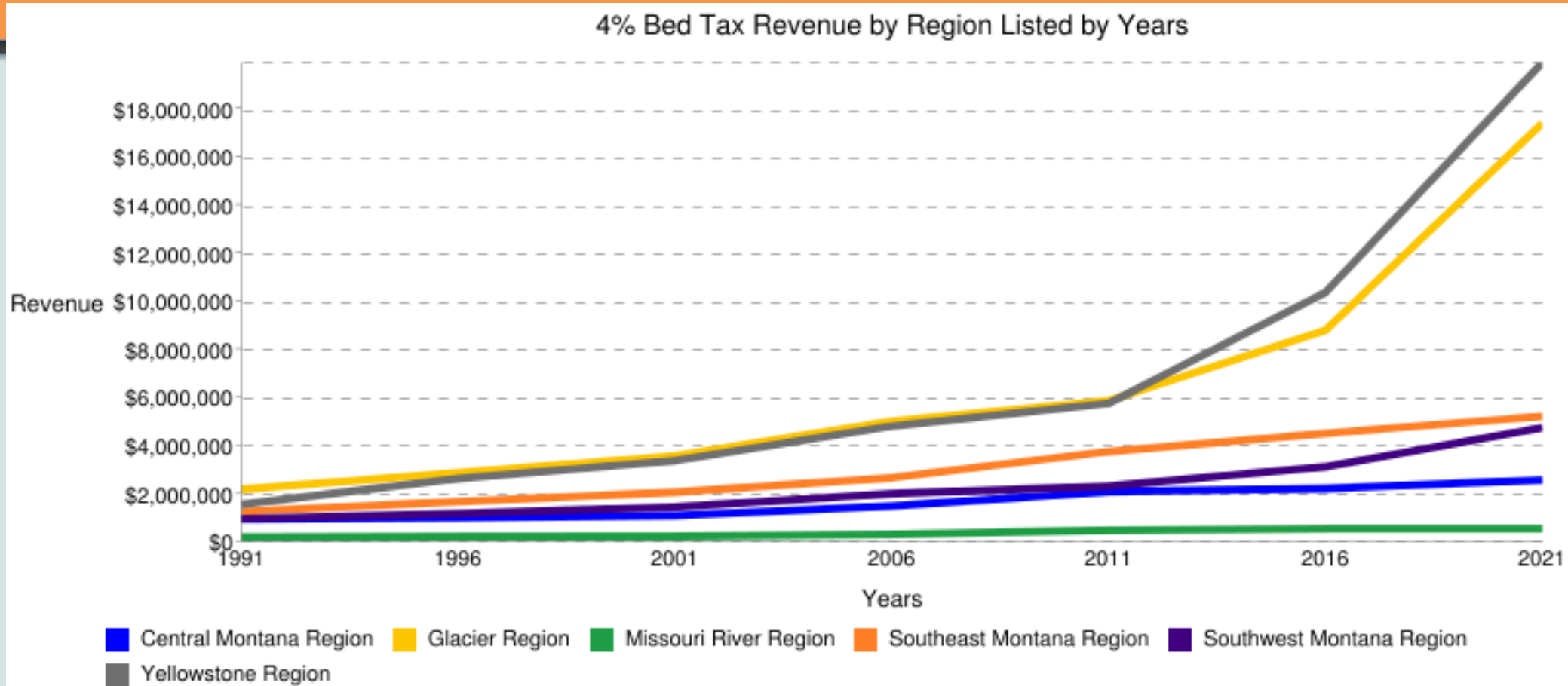
In 2021, **12.5 million** non-resident visitors:  
spent **\$5.15 Billion**,

- supported **68,630 jobs** statewide - **\$2.04 billion** in salaries,
- generated **\$388 million** in state & local taxes and
- lowered taxes on each Montana household by over **\$866.00**

\* Data is based on preliminary spending report by ITRR released May 2021



# 30 Years of Bed Tax by Region



# Travel and Tourism

Navigating a pandemic and the  
desires for open spaces

**JEREMY L. SAGE, Ph.D.**

ECONOMIST & INTERIM DIRECTOR  
INSTITUTE FOR TOURISM AND RECREATION RESEARCH

ASSOCIATE RESEARCH PROFESSOR  
DEPARTMENT OF GEOGRAPHY

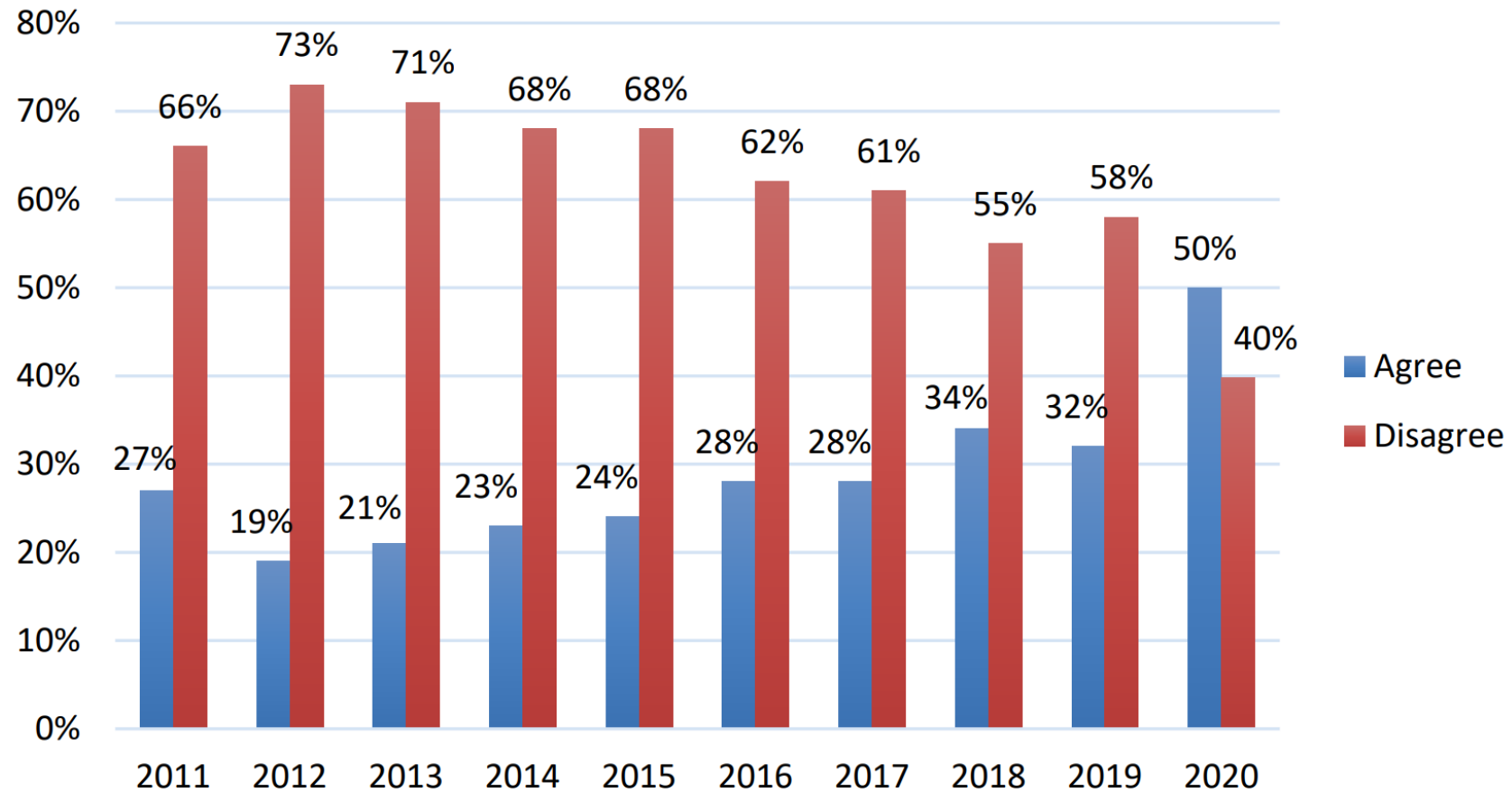
FRANKE COLLEGE OF FORESTRY AND CONSERVATION  
In the aboriginal territories of the Salish and Kalispel people



**BUREAU OF BUSINESS AND  
ECONOMIC RESEARCH**  
UNIVERSITY OF MONTANA

February 2021 - TAC

# Resident Attitudes Towards Tourism



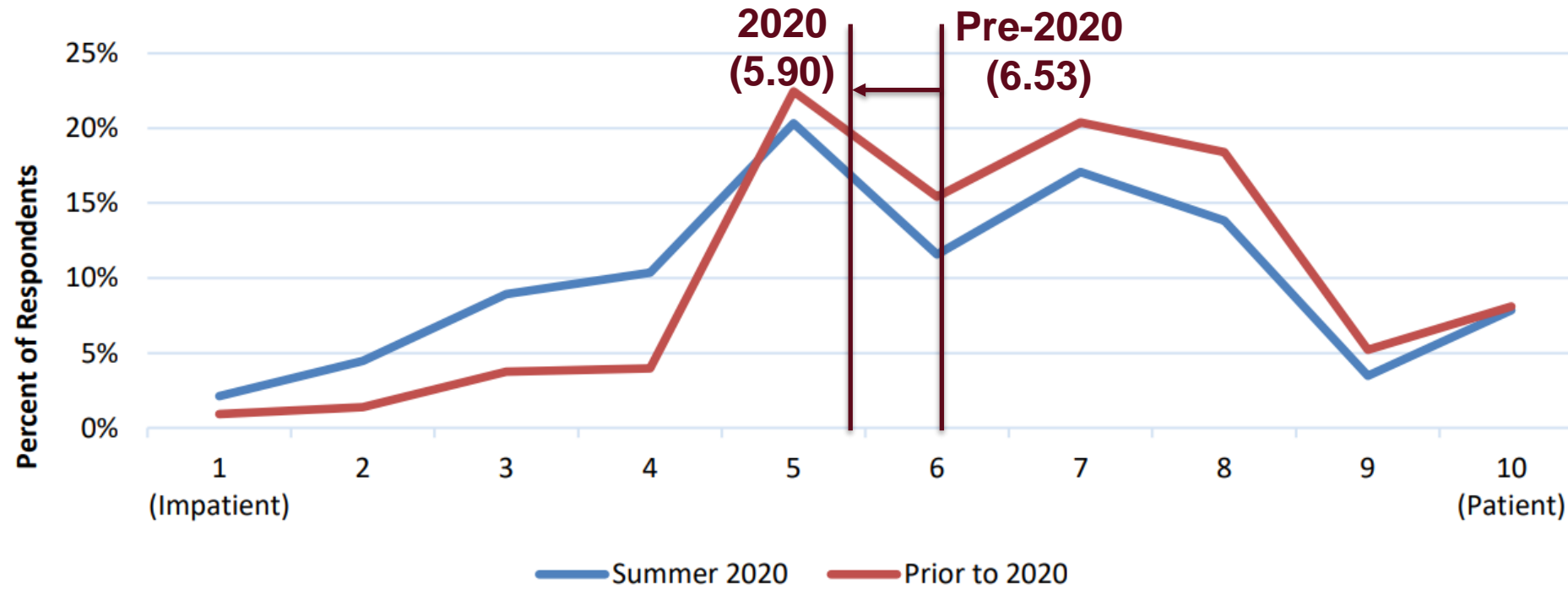
**Question:** In recent years, the state is becoming overcrowded because of more tourists

Rated on a scale of Strongly Disagree to Strongly Agree

Source: Institute for Tourism and Recreation Research(2020 responses collected in Q3; Previous years in Q4)



# Resident Attitudes Towards Tourism



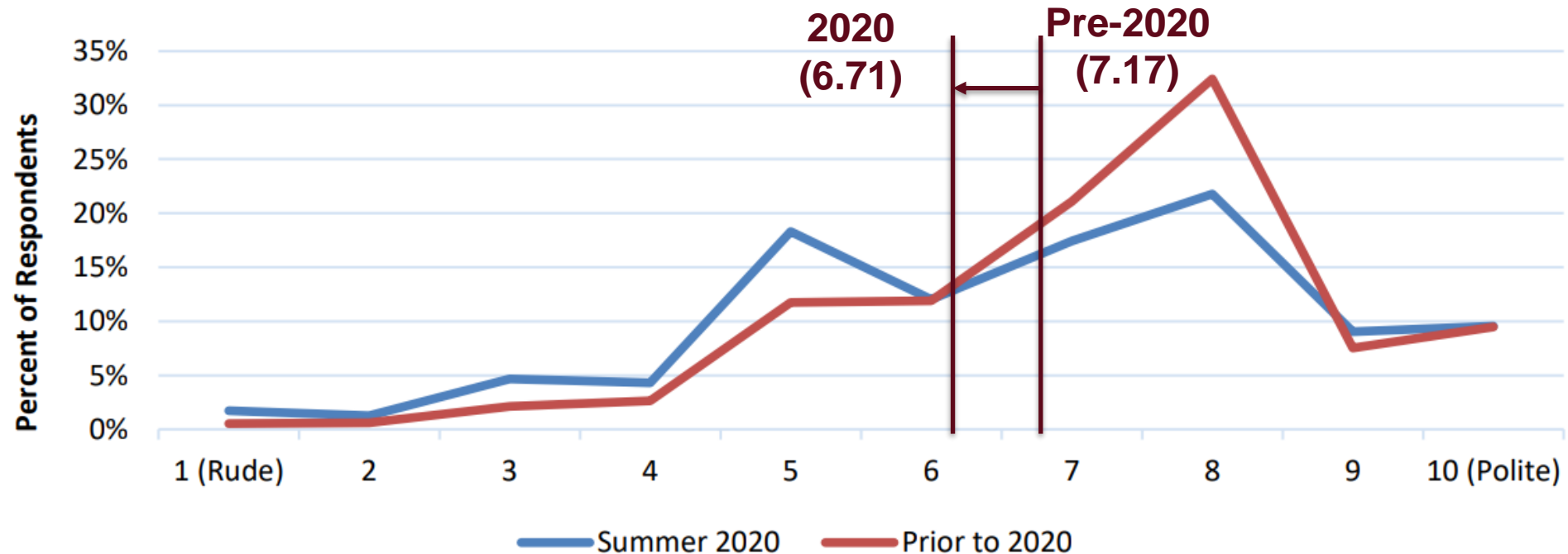
**Question:** How would you assess the general or overall behavior of visitors to Montana?

Rated on a scale of 1=Impatient – 10=Patient

Source: Institute for Tourism and Recreation Research



# Resident Attitudes Towards Tourism



**Question:** How would you assess the general or overall behavior of visitors to Montana?

Rated on a scale of 1=Rude – 10=Polite

Source: Institute for Tourism and Recreation Research







# Sustainable Tourism

"Our success cannot continue unabated if we don't take into consideration that this industry needs to be sustainable."

*Caroline Beteta, Visit California*

TRAVEL WEEKLY

From marketing to managing Quality vs. quantity A shifting emphasis



Advertisement

PART ONE OF A TWO-PART LOOK AT THE EVOLUTION OF DMOs

## FROM MARKETING TO MANAGING



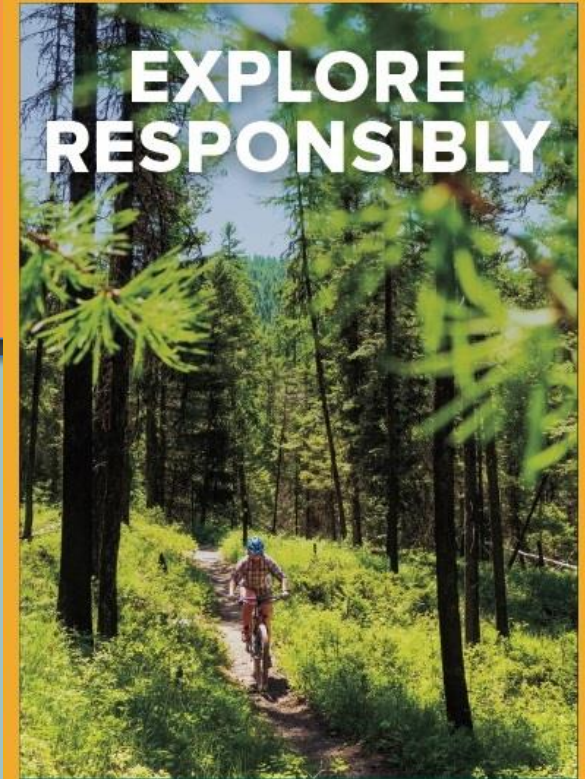


# Recreate Responsibly



**Do your part  
to recreate  
responsibly.**

We're committed to keeping Montana's outdoor spaces, communities, residents and visitors safe. As you enjoy all the area has to offer, please join us in following these guidelines for responsible recreation.



**EXPLORE  
RESPONSIBLY**

## BE A FRIEND OF THE FISH

Take It Slow. Enjoy the Ride.  
Show Respect and Kindness.  
Recreate Responsibly.  
Be a Steward of the Land.  
Fuel our Local Businesses.  
Help us Stay Healthy.

For more Information, please visit  
**FriendOfTheFish.com**

**WHITEFISH**  
• MONTANA •





# Economic Impact









# Team Tourism

Thank you!

[www.voicesoftourism.com](http://www.voicesoftourism.com)



Monthly emails



JOBS - COMMUNITY - ECONOMY

**Stuart Doggett - Executive Director**

**Montana Lodging & Hospitality Association**





# Tourism Solutions Roundtable



1. *Direct \$1-2 million of the fund balance to the most successful, most requested, and oversubscribed grants and marketing programs established by the Department of Commerce in last few years, including flood relief funding.*
2. *Develop a new program using \$2-4 million of the fund balance to provide meaningful support in larger grant sizes to local community events or event infrastructure.*
3. *Invest \$500,000 in research tools and make them accessible to all.*
4. *Invest \$2-3 million of the fund balance to create a sustainable funding source for existing Eastern MT promotion effort.*
5. *Use \$1-2 of the annual Commerce Budget and \$1-2 million of the fund balance increase business travel and promote Montana for business travel and meetings & conventions. Support strategies to improve business travel beyond the seven major cities.*
6. *Invest \$1.6 million in the CVBs per year over the next five years.  
Invest \$3 million in the tourism regions per year over the next five years.*
7. *Invest in new highway welcome signs into and around the state.*



## **17 Partners Including:**

- **Economic Development**
- **Airport**
- **Contractors**
- **County Commissioner**
- **Dude Ranchers**
- **Chambers**
- **Transportation**

# Tourism Solutions Roundtable



1. **Direct \$1-2 million of the fund balance to the most successful, most requested, and oversubscribed grants and marketing programs established by the Department of Commerce in last few years, including flood relief funding. – Eastern Montana Grants Approved \$1 million**
2. *Develop a new program using \$2-4 million of the fund balance to provide meaningful support in larger grant sizes to local community events or event infrastructure.*
3. **Invest \$500,000 in research tools and make them accessible to all. – \$500K Approved, Searching Vendors**
4. *Invest \$2-3 million of the fund balance to create a sustainable funding source for existing Eastern MT promotion effort.*
5. **Use \$1-2 of the annual Commerce Budget and \$1-2 million of the fund balance increase business travel and promote Montana for business travel and meetings & conventions. Support strategies to improve business travel beyond the seven major cities. – Approved, starting with research followed by investment**
6. *Invest \$1.6 million in the CVBs per year over the next five years.  
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TOURISM MATTERS  
TO MONTANA



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- **Economic Development**
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# In Review

- Current model of funding distribution promotes sustainable practices while supporting economic stability
- The destination management and stewardship model provides local and regional voices unique to each community with focus on residents.
- Main Street businesses thrive when visitors contribute economically, bringing in new dollars to circulate in MT.