



Voices of Montana Tourism

The Value of Tourism For Billings and Montana

Thursday, October 15, 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

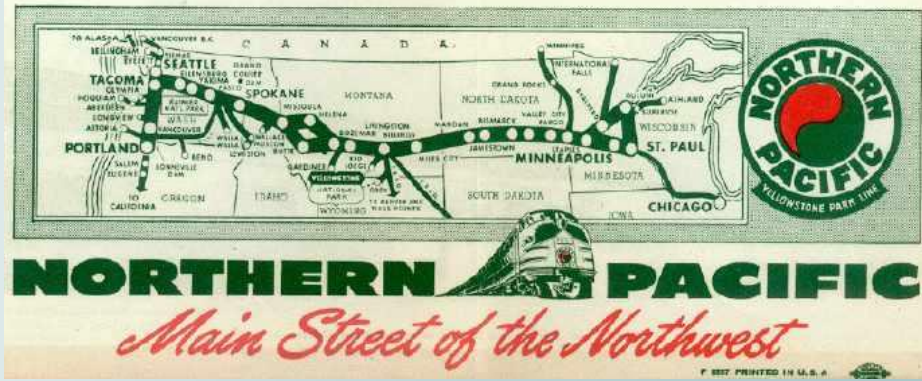


JOBS - COMMUNITY - ECONOMY



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History of Tourism in Montana



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Travel Marketing and Promotion

PRODUCTS COMMERCIAL BRAND
MARKETING 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



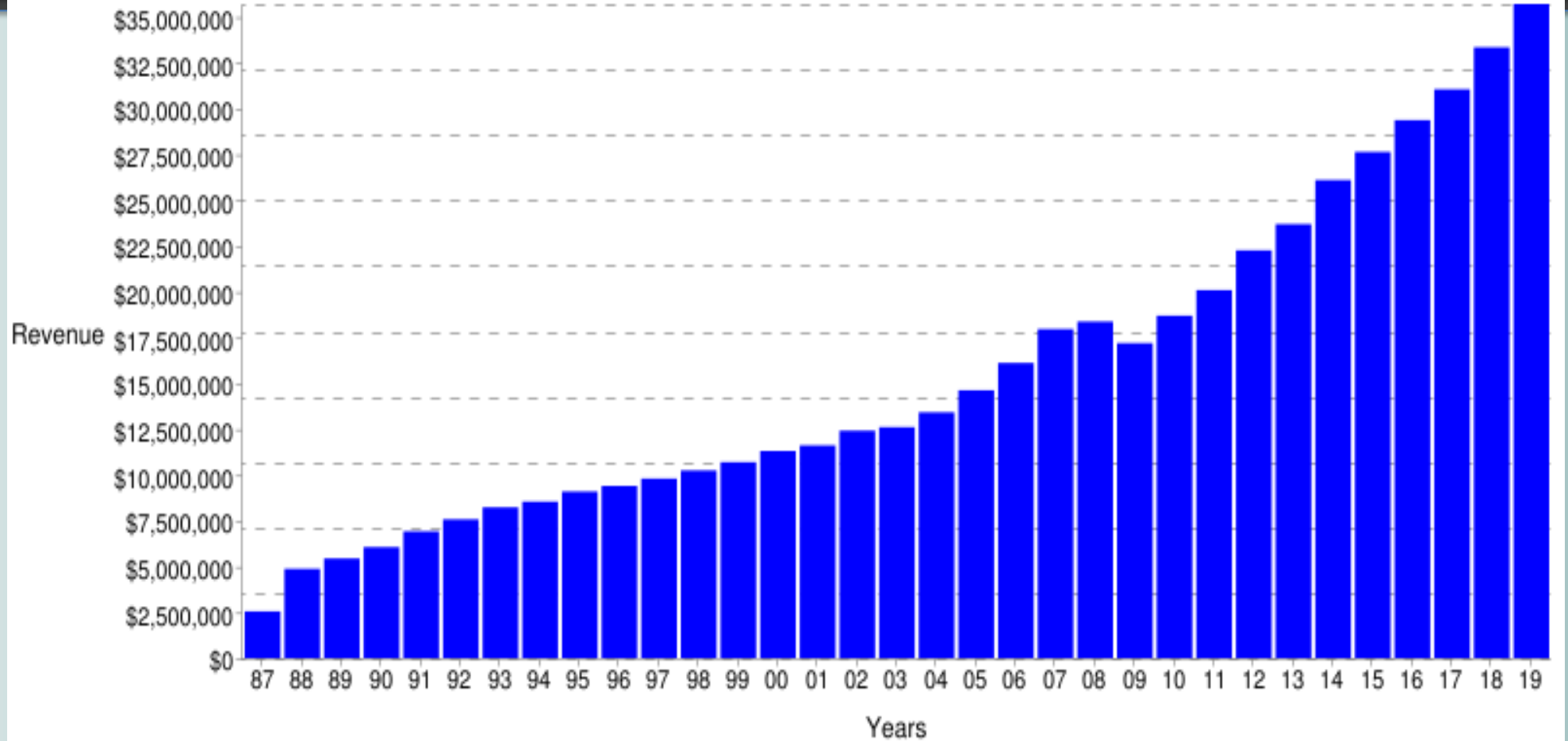
Additional Visitor Spending

U.S. TRAVEL
ASSOCIATION



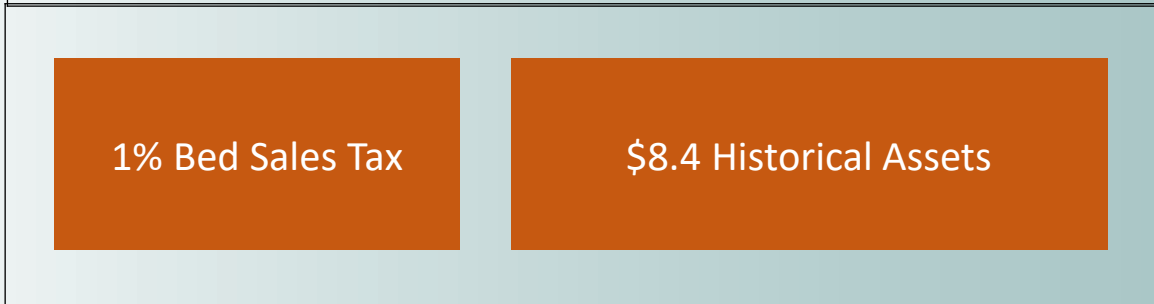
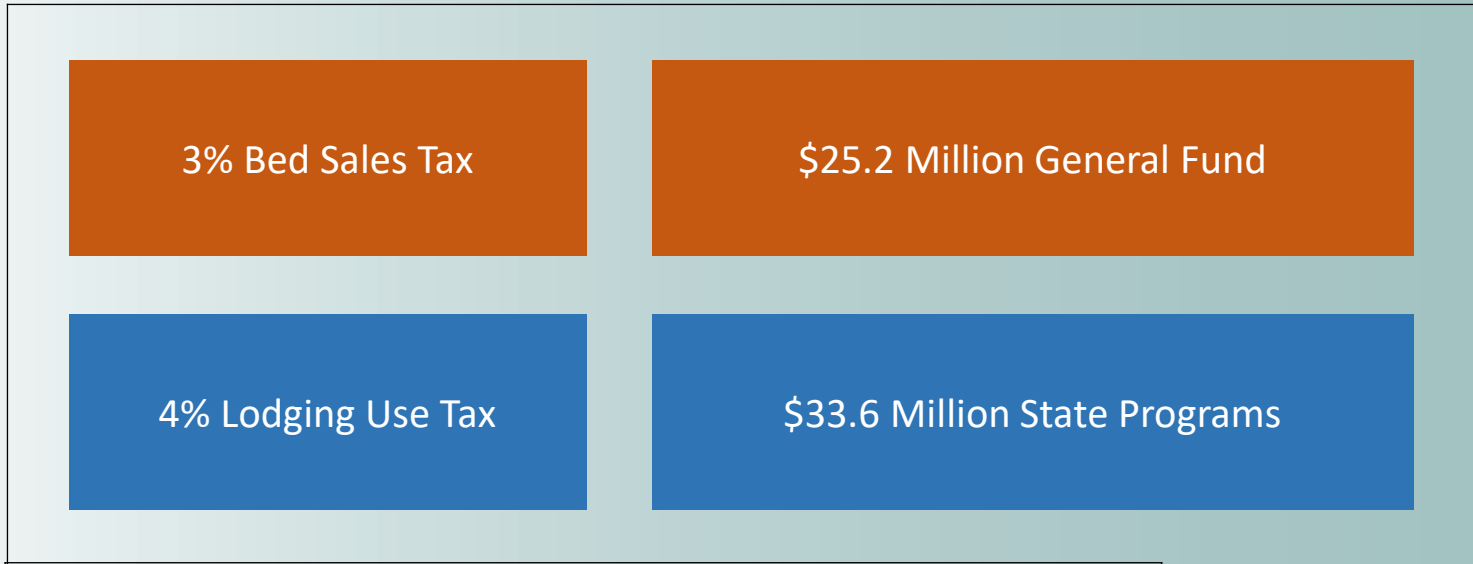
MT Bed Tax History

Statewide Bed Tax Revenue by Years





Funding Sources



FY19 Revenues

January 1, 2020

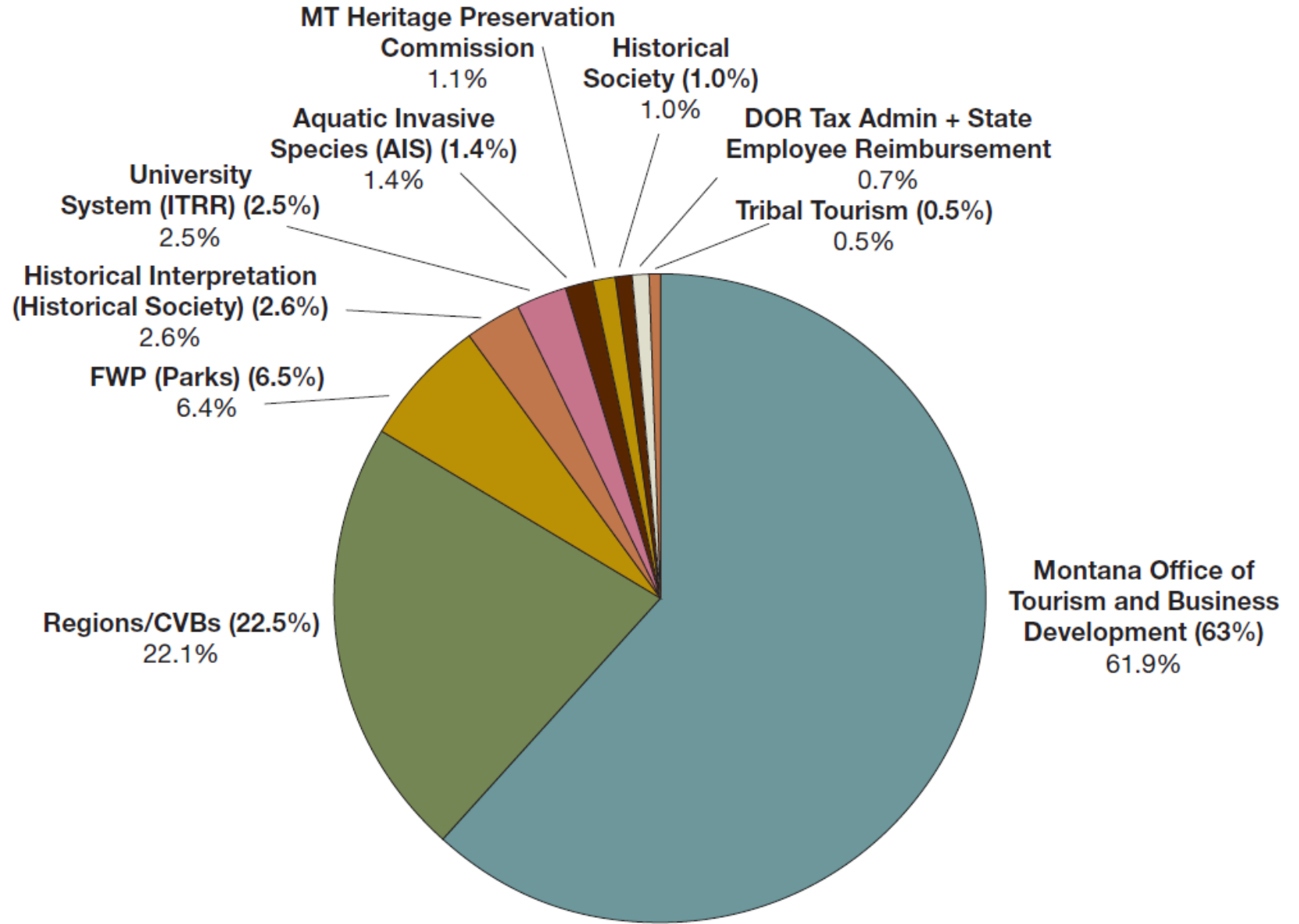




Montana Promotion Funding



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:

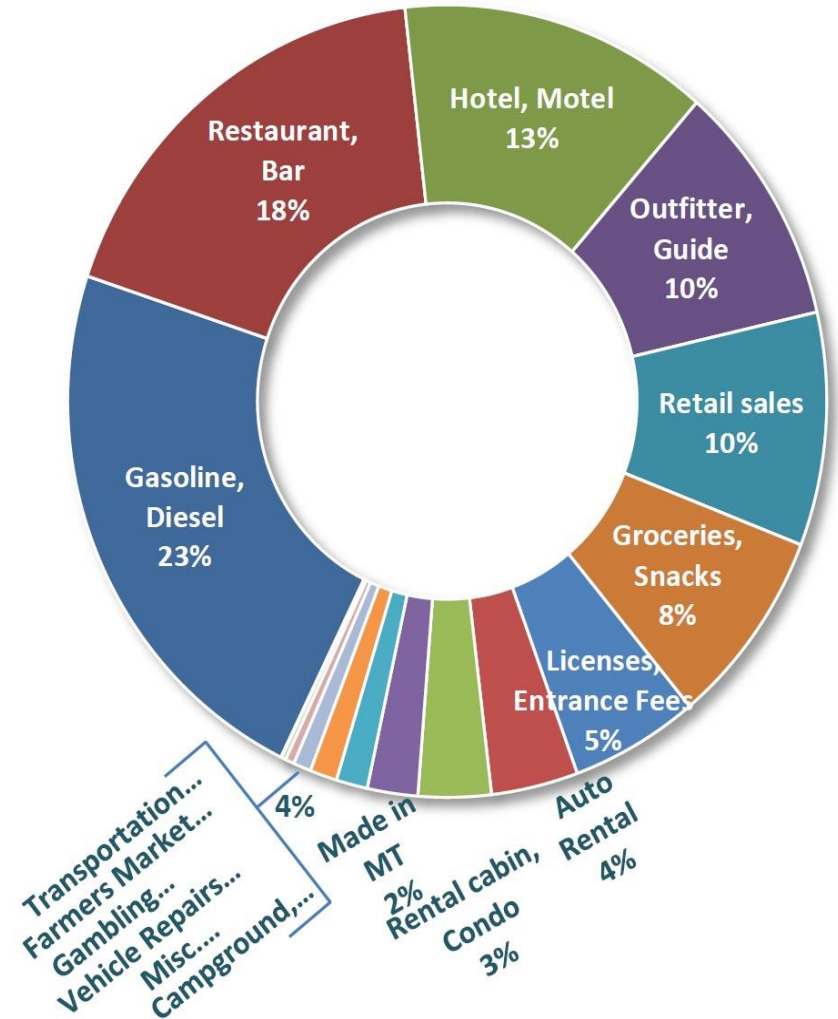
spent **\$3.76 Billion**,

- 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 |

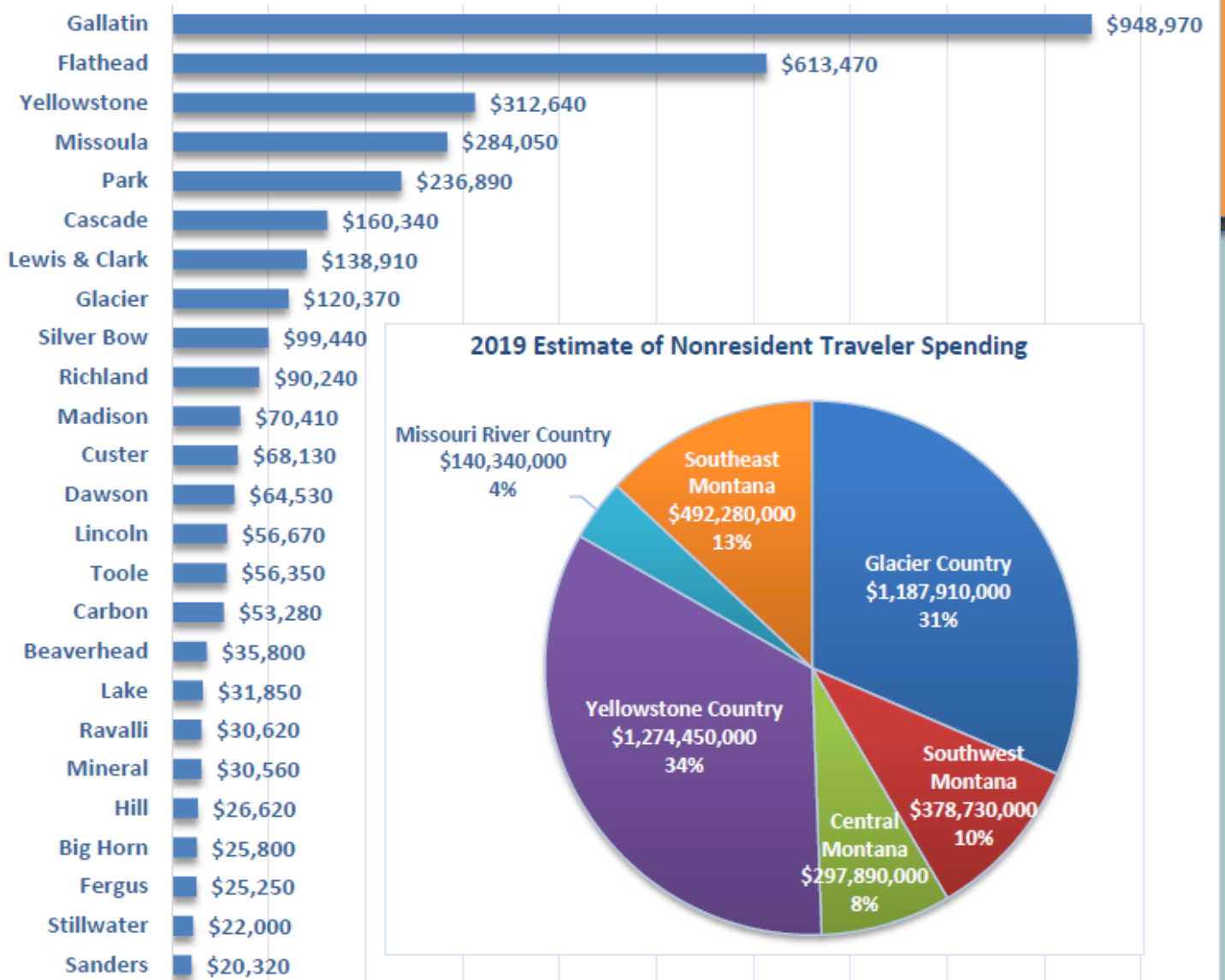
2019 Expenditure Allocation by Category



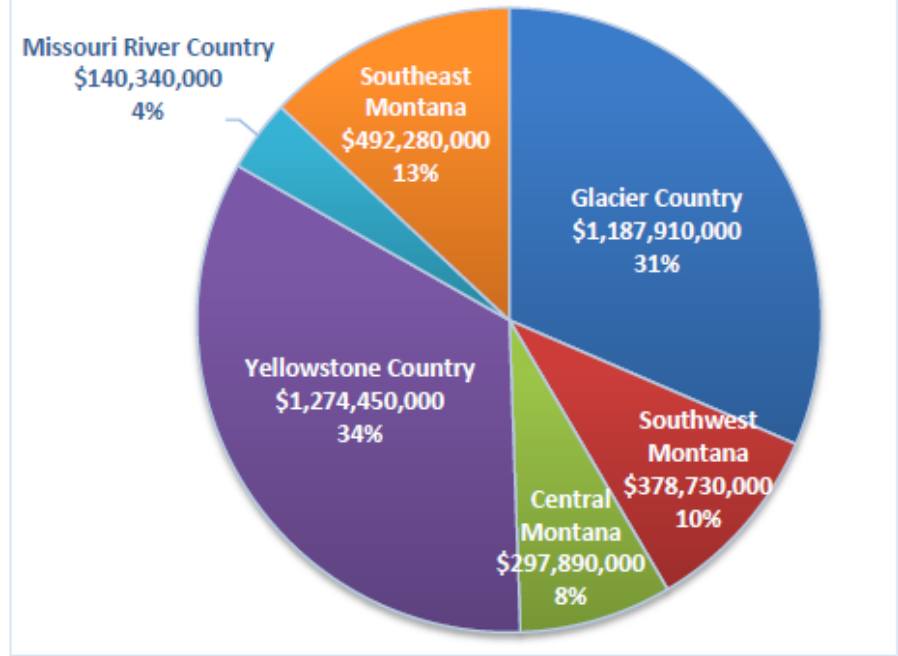


Nonresident spend per county

2018-2019 Estimate of Nonresident Traveler Spending per County
 Counties with \$20 million or more



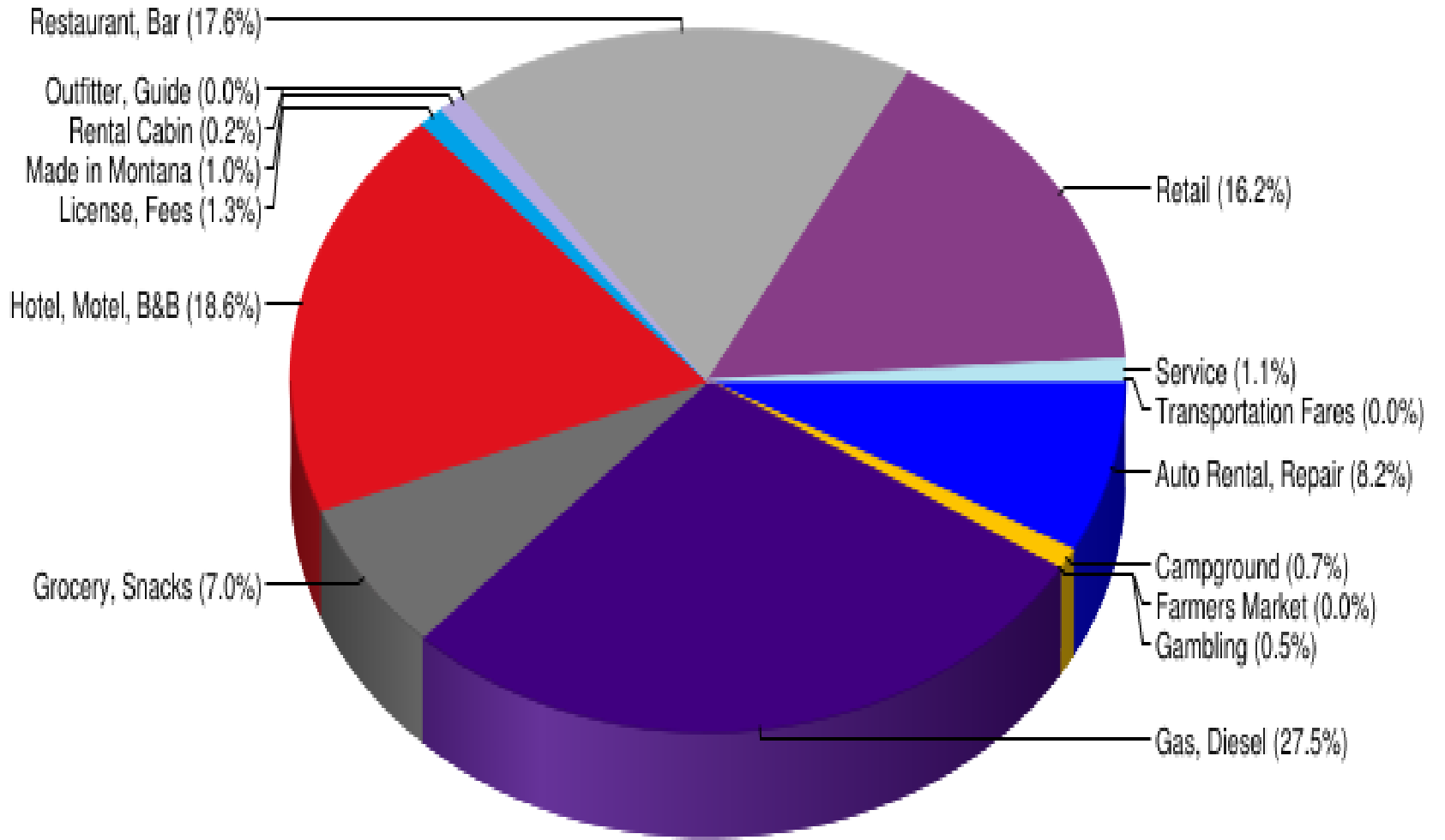
2019 Estimate of Nonresident Traveler Spending



\$- \$100,000 \$200,000 \$300,000 \$400,000 \$500,000 \$600,000 \$700,000 \$800,000 \$900,000 \$1,000,000
 in \$1000s



2019 Nonresident Expenditures % for Yellowstone County: \$312,636,000



Spend 2019



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%) |



Billings

Bed Tax Collections

| | <u>2017</u> | | <u>2018</u> | | <u>2019</u> | | <u>2020</u> | |
|---------------|--------------------|--------------|--------------------|--------------|--------------------|--------------|------------------|---------------|
| 1/1 - 3/31 | \$644,626 | (+4%) | \$650,633 | (+1%) | \$709,458 | (+9%) | \$575,438 | (-19%) |
| 4/1 - 6/30 | \$965,800 | (+6%) | \$931,798 | (-4%) | \$868,347 | (-7%) | \$381,709 | (-56%) |
| 7/1 - 9/30 | \$1,035,416 | (-7%) | \$1,068,332 | (+3%) | \$1,089,152 | (+2%) | \$0 | (+0%) |
| 10/1 -12/31 | \$643,562 | (+1%) | \$712,051 | (+11%) | \$685,712 | (-4%) | \$0 | (+0%) |
| Total: | \$3,289,404 | (+0%) | \$3,362,814 | (+2%) | \$3,352,669 | (-0%) | \$957,147 | (-39%) |



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.



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Team Tourism

The screenshot shows the homepage of the website. At the top left is the logo. The navigation bar includes: Home, About Us, Tourism's Value, Research, Get Involved, Media Room, Contact Us. There are social media icons for Facebook, Twitter, and a plus sign, along with an email sign-up form. The main content area features a featured article titled "Tourism Fuels Our Economy" with a sub-headline "Visitors Spend over \$3 Billion Annually". Below this are sections for "Supporting Tourism – a Leading Montana Industry", "Upcoming Events", and "Latest News".

Thank you!

www.voicesoftourism.com



Monthly emails



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