



Voices of Montana Tourism

The Value of Tourism For Bozeman, Yellowstone Area and Montana

Thursday, October 1, 2020



Education & Outreach

How Voices Tells the Story

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





Education & Outreach

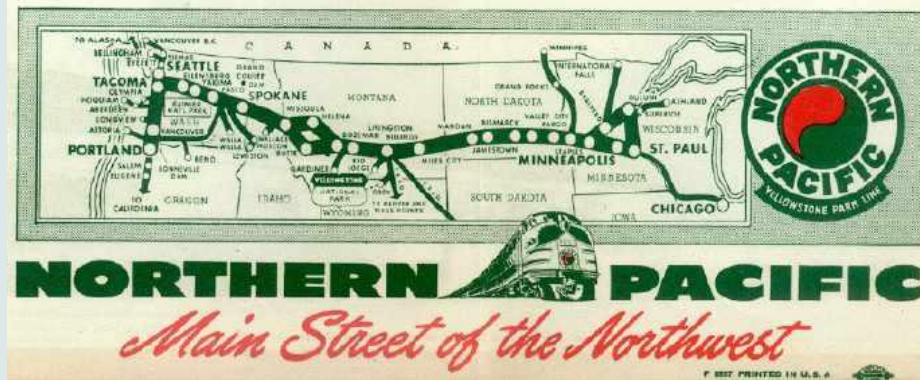
- Montana's Model
- Economic Update
- COVID-19 Impact



JOBS - COMMUNITY - ECONOMY



History of Tourism in Montana



VOICES OF
MONTANA TOURISM
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



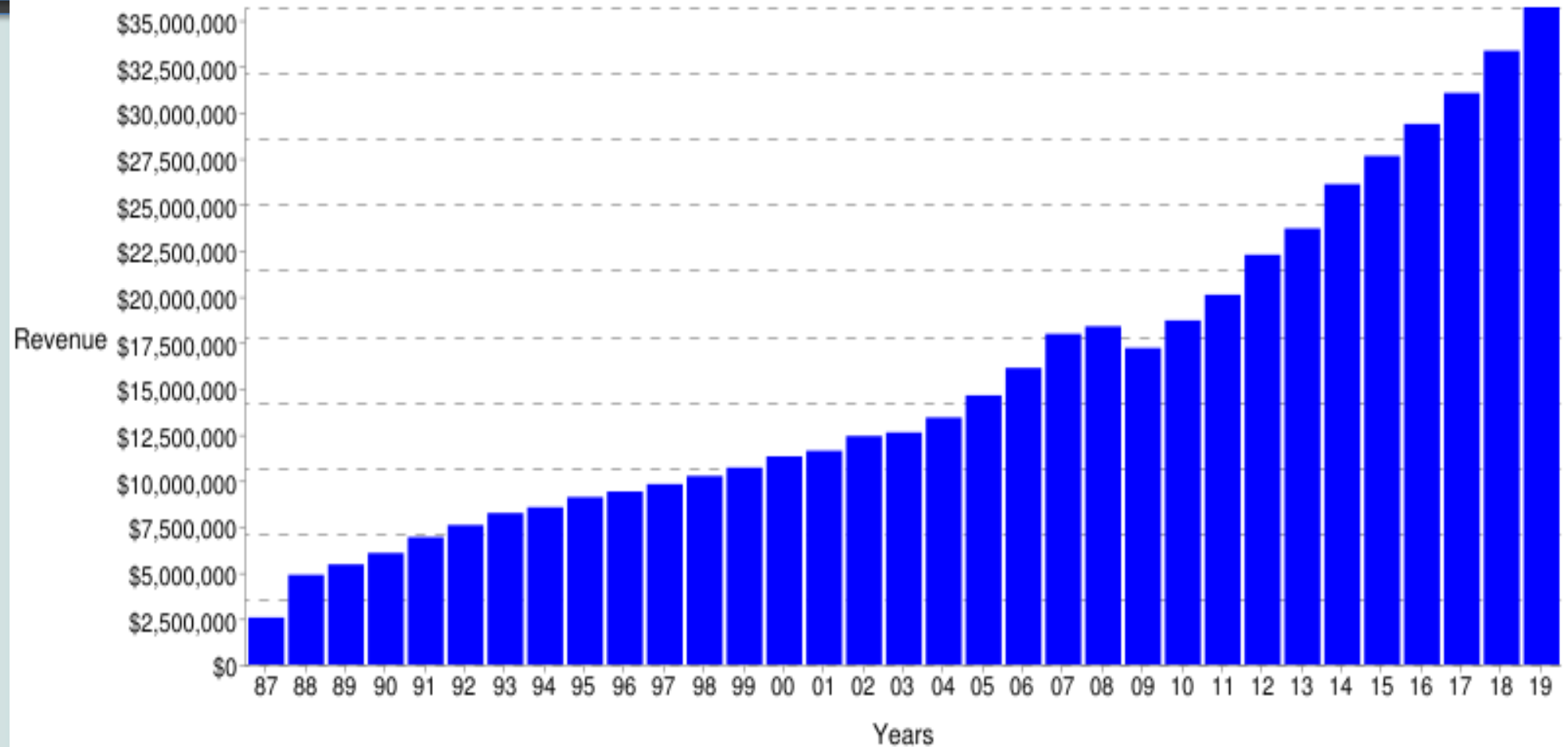
Additional Visitor Spending

U.S. TRAVEL
ASSOCIATION



MT Bed Tax History

Statewide Bed Tax Revenue by Years





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

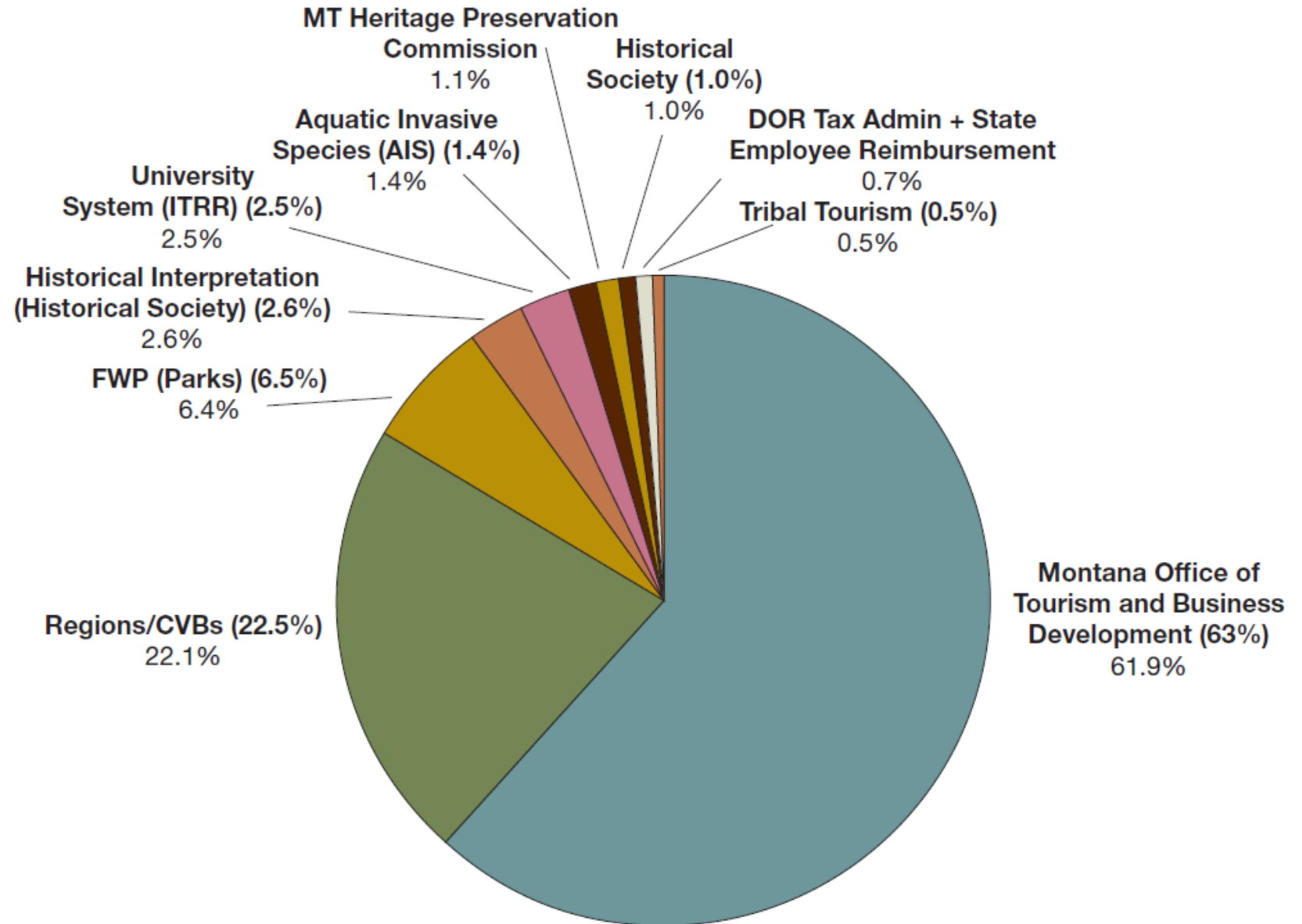




Montana Promotion Funding



DISTRIBUTION OF 4% LODGING FACILITY USE TAX*





Return On Investments

Tourism is a leading industry in Montana

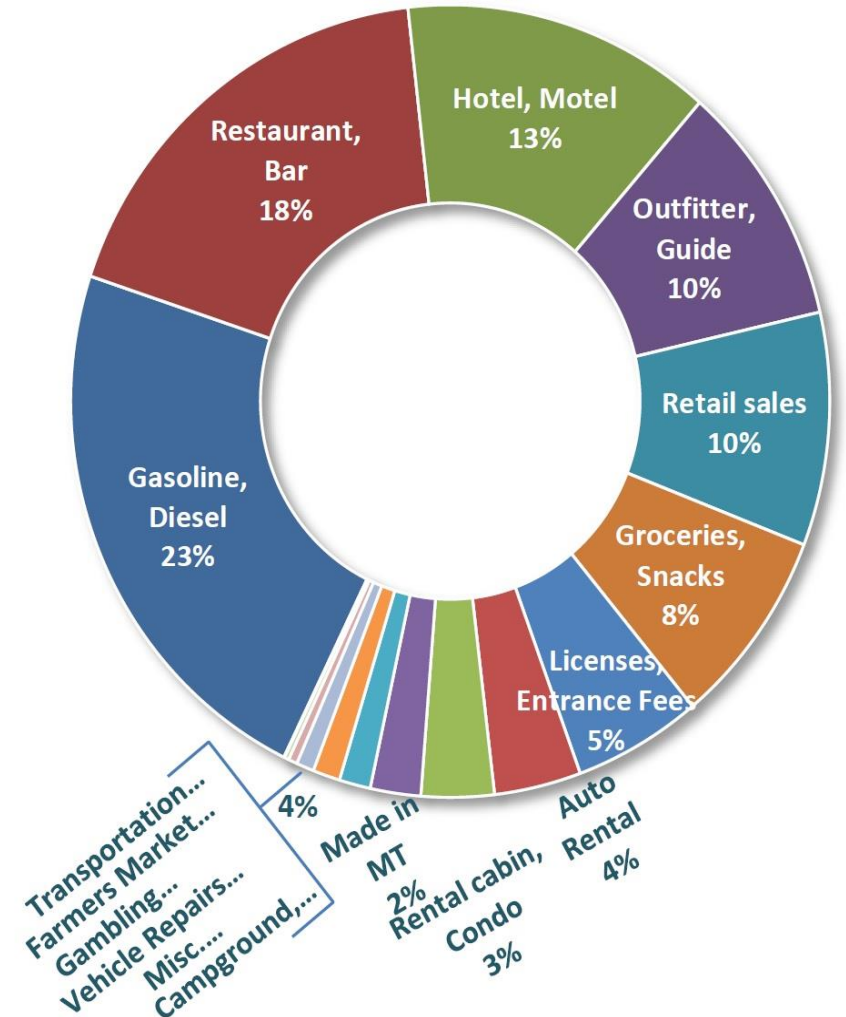
In 2019, **12.6 million** non-resident visitors:
spent **\$3.76 Billion**,

- 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

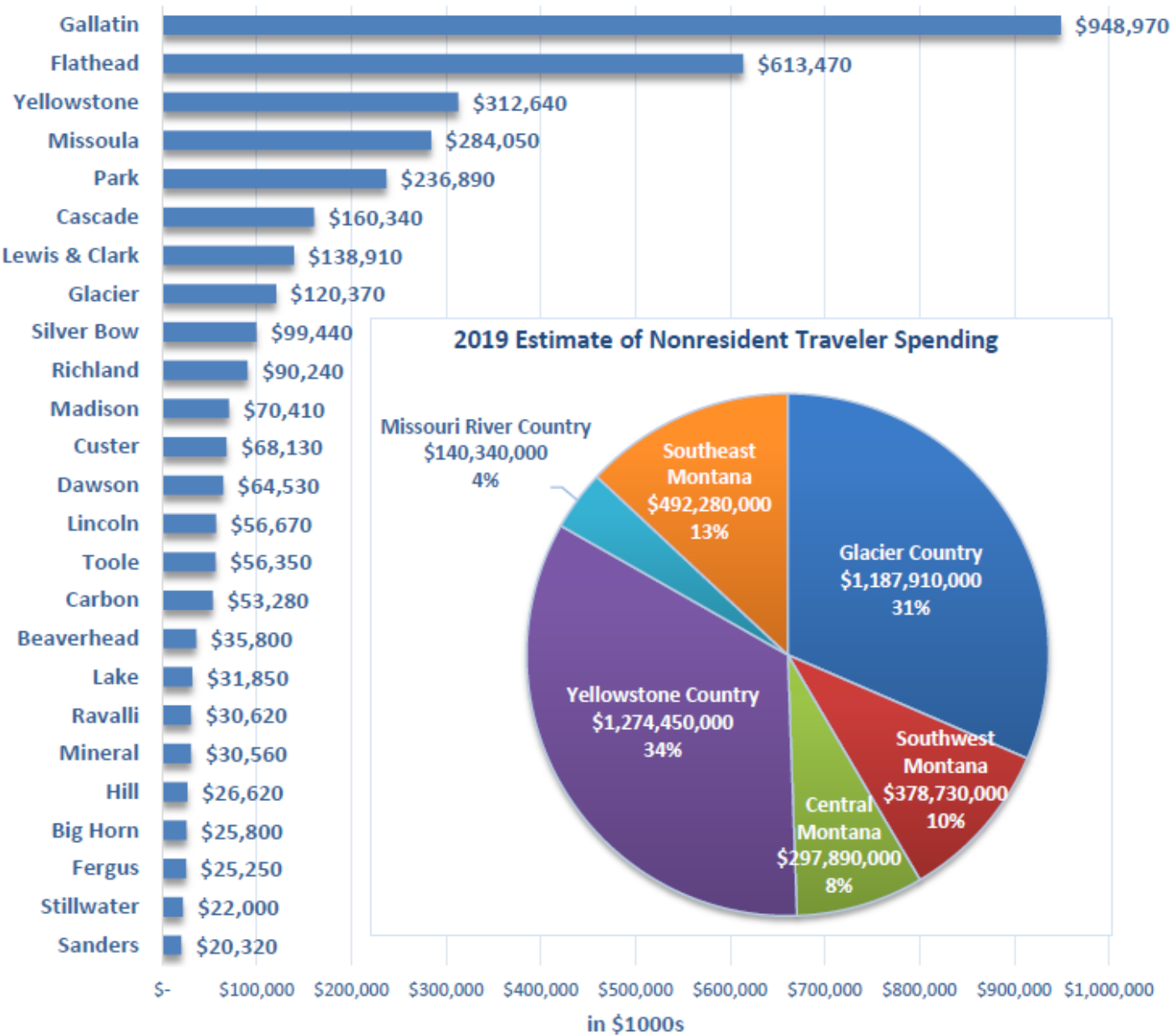
2019 Expenditure Allocation by Category





Nonresident spend per county

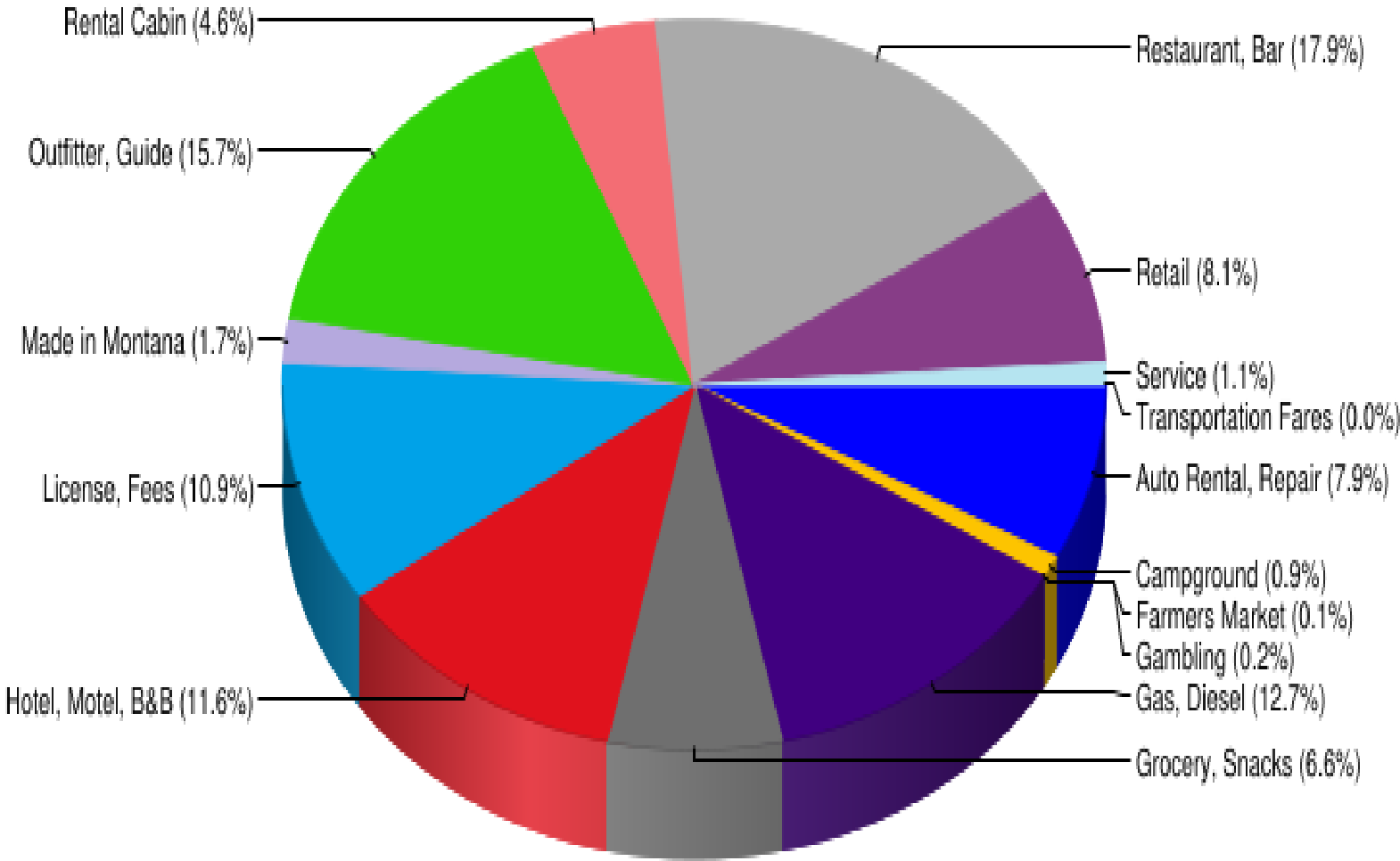
2018-2019 Estimate of Nonresident Traveler Spending per County
Counties with \$20 million or more





Spend 2019

2019 Nonresident Expenditures % for Gallatin County: \$948,971,000





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%)



Yellowstone Country Bed Tax Collections

	<u>2017</u>			<u>2018</u>			<u>2019</u>			<u>2020</u>	
1/1 - 3/31	\$1,980,177	(+10%)		\$2,318,472	(+17%)		\$2,922,675	(+26%)		\$2,857,104	(-2%)
4/1 - 6/30	\$2,656,034	(+7%)		\$2,922,532	(+10%)		\$3,292,585	(+13%)		\$1,241,680	(-62%)
7/1 - 9/30	\$4,978,163	(+6%)		\$5,282,084	(+6%)		\$5,530,591	(+5%)		\$0	(+0%)
10/1 -12/31	\$1,416,223	(+6%)		\$1,677,182	(+18%)		\$1,803,806	(+8%)		\$0	(+0%)
Total:	\$11,030,597	(+7%)		\$12,200,270	(+11%)		\$13,549,656	(+11%)		\$4,098,784	(-34%)



Yellowstone Area Q1-Q2 CVB Community Bed Tax

Belgrade	\$297,885	(+5%)	\$303,880	(+2%)	\$347,669	(+14%)	\$107,195	(-28%)
Big Sky	\$2,277,669	(+8%)	\$2,739,169	(+20%)	\$3,242,225	(+18%)	\$1,864,057	(-8%)
Bozeman	\$2,408,222	(+7%)	\$2,612,460	(+8%)	\$2,877,453	(+10%)	\$770,103	(-38%)
Gardiner	\$439,314	(+4%)	\$456,476	(+4%)	\$496,637	(+9%)	\$69,273	(-66%)
Livingston	\$297,629	(+6%)	\$270,776	(-9%)	\$270,790	(+0%)	\$54,826	(-44%)
Red Lodge	\$186,913	(-0%)	\$226,272	(+21%)	\$243,256	(+8%)	\$79,588	(-19%)
West Yellowstone	\$2,447,071	(+5%)	\$2,538,544	(+4%)	\$2,613,738	(+3%)	\$352,968	(-65%)

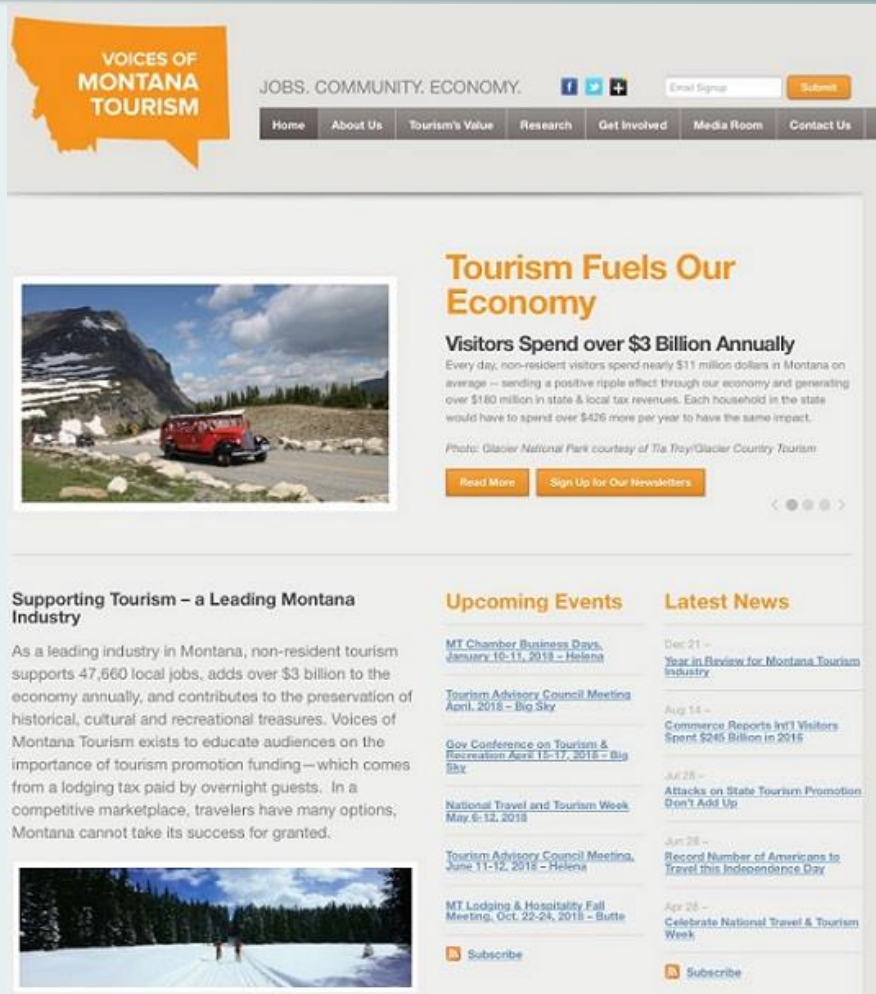


In Review

- 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



Thank you!

www.voicesoftourism.com



Monthly emails



JOBS - COMMUNITY - ECONOMY