

## FY17 University Travel Research Program

### Estimated Revenue and Request for Project Authorization

The Board of Higher Education Commissioner's office has budgeted \$697,000 for the FY17 University Travel Research program. ITRR is required to use that number as the base budget. However, ITRR has budget savings from previous years in which an additional \$72,962 will be applied to FY17. The total dollars currently available for FY17, therefore is \$769,962.

The proposed projects listed below for FY17 equal \$769,962 and include 9 possible projects. Two of the projects involve several studies (Data mining has 4 suggested studies and Panel Surveys has up to 5 suggested studies).

The TAC research committee and the full TAC is charged with approving research projects within the available dollars for the travel research program.

### FY17 Recommended Projects and Administration Budget

|  | <u>Operating*</u> | <u>Salary/<br/>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         |
| <b>Total</b>   | <b>\$143,127</b>  | <b>\$626,835</b>            | <b>\$769,962</b> |

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

# Quarterly Nonresident Visitor 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 decision making, presentations, and planning. 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 data on the report builder for clients 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.

## Nonresident 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. For calendar year 2017, the resident travel study will be conducted by our nonresident visitor surveyors.

## **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.
- 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 to complete. This additional data includes activities, sites visited, routes driven, satisfaction, attractions to the state, information sources used, and technology use.
- 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 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 while spending is estimated on a quarterly basis.
- Press releases and presentations will be part of the dissemination of the results.

**Anticipated Timeframe:** on-going

|  | <u>Operating*</u> | <u>Salary/<br/>Benefits</u> | <u>Total</u> |
|--|-------------------|-----------------------------|--------------|
| Quarterly Nonresident Visitor Analysis | \$85,700          | \$329,218                   | \$414,918    |

## 2016 Economic Impacts and 2017 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 2017. The objective is to get this information out to as many Montanans as possible through Economic Outlook Seminars (9 Montana cities), the 2017 Outlook article, the Governor's Conference on Tourism, and other group events around the state.

#### Objectives:

- To estimate 2016 visitation through secondary data sources and ITRR nonresident data.
- To project 2017 tourism and recreation visitation numbers based on trend data, national projections, and indicator data from the state and region.
- To conduct the annual outlook survey to MT tourism business owners and ask an additional question to accommodation owners/managers their percent of business that is through an OTA.

### **Outcomes**

The following information will be provided from this project:

1. The Tourism and Recreation Outlook 2017 will be presented with the Bureau of Business and Economic Research to nine cities in Montana (Helena, Great Falls, Missoula, Billings, Bozeman, Butte, Kalispell, Miles city and Sidney), and for other groups and conferences as requested.
2. The ITRR Travel Outlook article.
3. Preliminary 2016 economic and visitation figures, used by tourism related business and agencies for planning, will be available in mid-January 2017 and final numbers available in late May 2017.
4. The ITRR Website will contain the newly-updated information.

**Anticipated Timeframe:** On-going

|  | <u>Operating*</u> | <u>Salary/<br/>Benefits</u> | <u>Total</u> |
|--|-------------------|-----------------------------|--------------|
| 2016 Economic Impacts and 2017 Outlook | \$7,800           | \$49,502                    | \$57,302     |

## 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:

- To produce the 2016 Biennial Edition of the Economic Review of the Travel Industry
- To collect, summarize, and distribute regional and national tourism research information to Montana CVB's, travel regions and the MT Office of Tourism as it becomes available.
- Continually collect and update trend data on the ITRR interactive data web page to include: skier visits, airport deboardings, Amtrak, resident attitude 3-question, 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.

**Outcomes**

1. The interactive web page will be upgraded 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/<br/>Benefits</u> | <u>Total</u> |
|-----------------------------------|------------------|-----------------------------|--------------|
| Tourism and Recreation Monitoring | \$11,000         | \$38,834                    | \$49,834     |

**Data Mining of ITRR Data Sets**

**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
- Spending of airline travelers by MT airport

*Possible* reports generated:

- Change in 2014 vs 2015 spending by Canadian visitors
- Wildlife tourism – extract data from those who visit due to wildlife (wildlife watching, hunting, fishing). Look at spending and characteristics. Compare to national wildlife report by state.

**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 on the results will be written as needed.
2. Journal articles will be written and submitted for publication.
3. Presentations on data findings will be provided at conferences and meetings.

**Anticipated Timeframe:** on-going

|                               | <u>Operating*</u> | <u>Salary/<br/>Benefits</u> | <u>Total</u> |
|-------------------------------|-------------------|-----------------------------|--------------|
| Data Mining of ITRR data sets | \$0               | \$18,677                    | \$18,677     |

## Panel Studies

ITRR has until the end of September to use a panel survey software as another tool for soliciting data from previous visitors to MT or from those who have shown an interest in visiting MT. In addition, the panel has been gathering resident members and is now able to conduct research on residents. While we won't have the software program that makes it easier to conduct panel surveys, we will still have all the email address of members and will continue to conduct our own on-line surveys.

*Possible reports generated:*

- What are the trip spending behaviors before the trip commences? What do they pay for from home before a trip? What do they buy through the OTA?
- Visitation to northeast Montana – both resident and nonresident perceptions, awareness and interests in visiting NE Montana
- Experiences of those who have visited YNP and GNP. What do they do there and is there a feeling of overcrowded parks? (From Jenny Pelej -are trends in terms of increased human population in the parks and impact on user experience (if any)? Who is visiting and when (including residents), what they are doing, what they are experiencing, as we try to determine if there is a diminishing experience or if it is naturally inspiring people to visit at different times of the year, change their itineraries, stay outside the park but visit the park as one component of a bigger trip itinerary, etc.
- Memorable experiences of travel in Montana
- What is the tourism “driver” to Montana?

### **Methods**

Members of the panel will be sent an email asking them to participate in the study. One or two reminder emails will be sent for each study.

### **Outcomes**

4. MT Expression Research Notes or other reports will be written as needed.
5. Journal articles will be written and submitted for publication.
6. Presentations on data findings will be provided at conferences and meetings.

**Anticipated Timeframe:** July – December 2016

|               | <u>Operating</u> | <u>Salary/<br/>benefits</u> | <u>Total</u> |
|---------------|------------------|-----------------------------|--------------|
| Panel Studies | \$0              | \$25,396                    | \$25,396     |

## 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.

### **Methods**

Survey collection methods are determined by the type of event to be researched. The methods range from email surveys to intercept surveys.

### **Outcomes**

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

**Anticipated Timeframe:** on-going

|            | <u>Operating</u> | <u>Salary/<br/>benefits</u> | <u>Total</u> |
|------------|------------------|-----------------------------|--------------|
| Survey kit | \$500            | \$8,400                     | \$8,900      |

## Resident Travel in Montana

### Introduction

Four years ago ITRR conducted a year-long assessment of resident in-state vacation travel. It was deemed necessary to update the data and look further into specific locations in which residents travel within the state. While nonresident visitation to Montana provides new dollars to the state, it is important to include resident travel in the assessment to understand the overall Montana travel industry. Unlike the FY12 study, this study will assess all travel purposes, not just vacation within the state.

### Purpose and Objectives

The purpose of the study is to estimate annual resident travel within Montana, the spending impact of resident visitors to counties outside their residence (50 miles or more away from home), and to map the flow of resident travel within Montana. This study will

### Objectives

- To assess the spread of spending and amount of spending throughout Montana due to resident travel.
- To map travel patterns and destinations within Montana by residents.
- To identify purposes for travel within Montana.
- To compare spending by purpose of travel.
- To determine the annual estimate of resident travel days in Montana, both overnight trips and day trips within Montana.

### Methods

This study will utilize existing personnel from the quarterly nonresident visitor project to collect data about resident travel. Surveyors around the state will add this survey to their data collection procedures but of course will only intercept residents for this set of questions. Residents will be intercepted at gas stations and rest areas. Surveyors will ask respondents a number of on-site questions, then be given a mail-back survey to return in a postage paid envelope. Residents will need some form of incentive in order for ITRR to obtain a decent sample size. Each surveyor would hopefully intercept 20 residents per survey shift.

### Outcomes

The following outcomes will be provided from this project:

1. Analysis of resident travel behavior including, activity types, length of trip, purpose of travel, and distance traveled.
2. An estimation of yearly resident travel expenditures within the state by travel purpose.
3. An estimation of the number of in-state trips taken in a year.

**Anticipated Timeframe:** January 2017 – December 2017 (covers half of two fiscal years)

|                            | <u>Operating</u> | <u>Salary/ benefits</u> | <u>Total*</u> |
|----------------------------|------------------|-------------------------|---------------|
| Resident Travel in Montana | \$4,052          | \$36,064                | \$40,116      |

## Visitor Characteristics and Economic Analysis of Northeast Montana

### Introduction

The northeast region of Montana receives the least amount of nonresident visitation to the state and is slowly losing population. While the oil boom improved the economy for a few counties for a short period of time, it is not sustainable and has drastically changed in the past year. What is the current state of the counties in the northeast region of state - Montana's Missouri River Country? Where does tourism fit in the region's economy and what is its potential? What are the economic trends and where is it taking this region of the state?

**Purpose and Objectives**

The purpose of this study is to analyze the economic profile and visitation of the northeast region of the state (Missouri River Travel Region counties of Phillips, Valley, Daniels, Sheridan, Roosevelt, Richland, McCone, and Garfield) to understand the current economics of the region and where it appears to be heading.

Objectives:

Specifically, the objectives of this project are:

1. Identify who the northeast Montana visitor is and what activities they engage in while visiting Missouri River Country.
2. Describe the existing economic landscape, along with historical and recent economic and demographic trends to use in projecting future scenarios.
3. Project where tourism could be for the region in the next 30 years.
4. To determine MRC resident's attitudes toward tourism and the kind of tourism residents want to have in Missouri River Country.

**Methods**

To reach objective 1 above, visitor intercepts (resident and nonresident) in the region will be increased through the use of the quarterly nonresident survey, resident survey, and visitor data collection similar to the ITRR survey kit which would require the buy-in of Missouri River Country (events and attractions) and cooperation with other agencies (i.e. Corp of Engineers, US Fish and Wildlife, FWP).

To reach objective 2 above, secondary data will be compiled on county trends obtained through the U.S. Census Bureau, Bureau of Labor Statistics, and publically available planning documents within the region.

To reach objective 3 above, a panel survey of residents and nonresidents will be conducted related to current visitation and likelihood of visiting based on future scenarios of development in Missouri River Country.

To reach objective 4 above, ITRR will collate Missouri River Country resident responses to the ITRR resident attitudes toward tourism annual 3-question study from over the past 5 years and will add a specific question in the survey kits about the type of tourism residents want in their area.

**Outcomes**

A report will be written which will describe and analyze:

- 1) The social and economic trends of the region;
- 2) The current visitors to Missouri River Country;
- 3) Opportunities for economic development through tourism (where/if they exist); as well as their attitudes toward tourism.
- 4) Future scenarios with the opportunities suggested in objective #3.

**Anticipated Timeframe:** July 1, 2016 – June 30, 2017

|  | <u>Operating</u> | <u>Salary/<br/>benefits</u> | <u>Total*</u> |
|--|------------------|-----------------------------|---------------|
| Visitor Characteristics and Economic Analysis of Northeast Montana | \$8,405          | \$43,268                    | \$51,673      |

# Montana's Key Niche Activities for Visitation and Spending

## **Introduction**

People travel to Montana for a variety of vacation purposes and engage in an assortment of activities while visiting the state. ITRR has been able to take the current nonresident data and analyze the visitor by purpose of trip and further characterize both their travel behaviors and spending based on purpose of trip and primary attraction to the state. The missing piece of our current nonresident vacationer data is the inability to hone in on the activity that 'drove' the visitor to Montana. In other words, is there a primary activity that was the main reason the visitor came to Montana?

## **Purpose and Objectives**

The purpose of this study is to determine the top activity 'drivers' for Montana vacationers and the spending associated with those activities.

### Objectives:

- To determine the top 5 activities promoted by Montana's travel regions, CVB's, and Office of Tourism for each quarter.
- To determine the top activities (number of visitor groups and spending) engaged in by nonresidents in the state for each quarter.
- To assess the reasons why visitors chose to do those top activities in Montana.
- To compare the promoted activities to the actual activities engaged in by nonresident vacationers by season or quarter.

## **Methods**

Two methods will be conducted for this study. First a pilot study via the online panel members will be used to test and refine the survey instrument. Second, an additional questionnaire will be inserted into the nonresident mail-back survey envelope asking visitors to complete it based on their current trip to Montana.

The need for the pilot test is to be able to flesh out the best way to ask the questions such that the respondent is able to provide the correct answers. This is a complicated study and will take some time to fully create an accurate instrument. First of all, vacationers do many activities on a trip. It will be important to discover the primary activity by asking something like, "If \_\_\_\_\_ were not available for my MT trip, I would not come." Maybe we ask them to fill in the blank so we understand the 'ultimate' visitor need whereby without it, they would not visit. In addition, it's important to go further into their primary activity. For example: A visitor comes to MT and when pressed in a questionnaire to name their primary activity, they say hiking. Hiking, therefore is the driver, but why in Montana? Is it the wildlife they might see? Is it the type of landscape/terrain they would experience? Is it the lack of crowds or the solitary experience they may get in MT? Is it distance traveled (nearby)? Nearly every activity a nonresident would do in Montana is also possible to do in other parts of the county. What drives a visitor to do THAT activity in OUR state?

## **Outcomes**

1. A report and presentations will highlight the top activities engaged in by nonresidents to Montana and the reasons why those activities are done in Montana. Activities by quarter will be summarized. This will provide important insights for marketing purposes by DMO's and for planning and development purposes by land managers, community leaders, and small businesses.

**Anticipated Timeframe:** July 1, 2016 – June 30, 2017

Operating\*

Salary/

Total

|  |       |                             |          |
|--|-------|-----------------------------|----------|
| Montana's Key Niche Activities for Visitation & Spending | \$500 | <u>Benefits</u><br>\$25,396 | \$25,896 |
|--|-------|-----------------------------|----------|

### Travel Research Program Projects FY05-FY16

#### FY16 Projects and Administration Budget

|   | <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 Administration | \$0                | \$27,289               | \$27,289        |
|   | <u>\$20,822</u>    | <u>\$38,002</u>        | <u>\$58,824</u> |
| <b>TOTAL</b>  | \$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> |
| <b>Total</b>                             | \$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 After | \$9,500           | \$29,097                | \$38,597     |

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

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### FY13

| <b>Approved</b>                                       | <b><u>Operating</u></b> | <b><u>Salary/ Benefits</u></b> | <b><u>Total</u></b> |
|---|-------------------------|--------------------------------|---------------------|
| 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>     |
| <b>Total Projects</b>                                 | <b>\$165,470</b>        | <b>\$449,390</b>               | <b>\$614,860</b>    |
| Administration  | <u>\$24,430</u>         | <u>\$18,140</u>                | <u>\$42,570</u>     |
| <b>Total Project and Admin. Budget</b>                | <b>\$189,900</b>        | <b>\$467,430</b>               | <b>\$657,430</b>    |

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

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### FY12

|   | <b><u>Operating*</u></b> | <b><u>Salary/ Benefits</u></b> | <b><u>Total</u></b> |
|---|--------------------------|--------------------------------|---------------------|
| 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            |
| <b>Total Projects</b>                                     | <b>\$72,700</b>          | <b>\$346,130</b>               | <b>\$418,830</b>    |
| Administration  | \$24,130                 | \$32,910                       | \$57,040            |
| <b>Total Possible Project and Admin. Budget</b>           | <b>\$96,830</b>          | <b>\$379,040</b>               | <b>\$475,870</b>    |

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### FY11

|  | <b><u>Operating*</u></b> | <b><u>Salary/ Benefits</u></b> | <b><u>Total</u></b> |
|--|--------------------------|--------------------------------|---------------------|
| 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        |
| <b>Total Project</b>  | <u>\$64,150</u> | <u>313,380</u> | <u>377,530</u> |
| Administration  | \$22,980        | \$28,300       | \$51,280       |
| <b>Total Project and Admin. Budget</b>                        | 87,130          | 341,680        | 428,810        |

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**FY10**


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|   | <u>Operating*</u> | <u>Salary/<br/>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         |
| <b>Total Project</b>                            | <u>\$75,071</u>   | <u>\$328,808</u>            | <u>\$403,879</u> |
| Administration                                  | \$35,000          | \$28,370                    | \$63,370         |
| <b>Total Possible Project and Admin. Budget</b> | <b>\$110,071</b>  | <b>\$357,178</b>            | <b>\$467,249</b> |

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**FY09**


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|   | <u>Operating*</u> | <u>Salary/<br/>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>  |
| <b>Total Project</b>  | <u>\$78,020</u>   | <u>\$293,330</u>            | <u>\$371,350</u> |
| Administration  | <u>\$59,730</u>   | <u>\$21,810</u>             | <u>\$81,540</u>  |
| <b>Total Possible Project and Admin. Budget</b>                       | <b>\$137,750</b>  | <b>\$315,140</b>            | <b>\$452,890</b> |

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**FY08**


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|  | <u>Operating*</u> | <u>Salary/<br/>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     |

|                |                                  |                  |                  |                  |
|----------------|----------------------------------|------------------|------------------|------------------|
|                | <b>Total Project</b>             | \$137,200        | \$142,054        | \$279,254        |
| Administration |                                  | \$50,600         | \$21,289         | \$71,889         |
|                | <b>Project and Admin. Budget</b> | <b>\$187,800</b> | <b>\$163,343</b> | <b>\$351,143</b> |

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**FY07**


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|   |  | <u>Operating*</u> | <u>Salary/<br/>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         |
| <b>Total Project</b>                                      |  | <b>\$49,980</b>   | <b>\$198,795</b>            | <b>\$248,775</b> |
|   | Administration                         | \$44,600          | \$21,275                    | \$65,875         |
|   | <b>Total Project and Admin. Budget</b> | <b>\$94,580</b>   | <b>\$220,070</b>            | <b>\$314,650</b> |

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**FY06**


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|  |  | <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        |
| <b>Total Project</b>                                       |  | <b>\$62,300</b>   | <b>\$247,988</b>       | <b>\$310,288</b> |
| Administration   |  | \$45,200          | \$18,596               | \$63,796         |
|  | <b>Total Project and Admin. Budget</b> | <b>\$107,500</b>  | <b>\$266,584</b>       | <b>\$374,084</b> |

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**FY05**


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|   |  | <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> |
| <b>Total Project</b>  |  | <b>\$62,760</b>   | <b>\$229,900</b>       | <b>\$292,660</b> |
| Administration  |  | \$54,140          | \$17,415               | \$71,555         |
|   | <b>Total Project and Admin. Budget</b> | <b>\$116,900</b>  | <b>\$247,315</b>       | <b>\$364,215</b> |

