# FY18 Research Requests

## 1. Trends and Forecasting

With the new ITRR economist on board, could we have ITRR develop a type of model that will allow us to forecast future trends and visitation? Ideally it could be used both at the statewide and local level. Perhaps ITRR charges the requesting region or CVB (like the survey kit) and ITRR can take data that the CVB has available (resort tax, bed tax, occupancy, airport and highway counts, Canadian exchange rate, and other indicators) and input it into this new model. This could be an extremely valuable resource to the state, regions, and CVB's for marketing decisions, policy development, and infrastructure development decisions.

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## 2. Gardiner, MT – Community Tourism Development case study – The AFTER

In FY2014 the TAC approved and ITRR conducted the first part of the study, "Community Tourism Development Case Study – Before and After." Either in summer 2017 or 2018 this study should be conducted again. As a reminder, here is some of what was written about the study for FY14.

The purpose of this study is to understand the effects of infrastructure development on the image and perceptions of a community by both residents and visitors and the change in economic impact to a community after the development is completed. This would be a two-stage project. Stage one, conducted in summer and fall of 2013, would provide the baseline data on: resident attitudes toward tourism, resident perceptions of their own community, and image of their community. Nonresidents would be asked to assess Gardiner's image, spending in the community, and other visitor characteristics. Stage two would conduct the same research as stage one after changes in Gardiner have been complete – probably in 2017.

Objectives:

- To assess the before and after resident attitudes, perceptions and image of Gardiner.
- To assess the before and after image, visitor characteristics and spending patterns by visitors to Gardiner.
- To compare the differences between the before and after variables of both residents and visitors.
- To assess whether infrastructure change affected image by directly asking return visitors to Gardiner and residents who lived there before the change occurred.
- To answer the question: Did the infrastructure change result in a positive or negative impact on residents and visitors?

A link to the reports generated from the first part of the study are below.

**Comparative Analysis of Resident and Visitor Community Image: Gardiner, Montana**
Authors: Norma P. Nickerson, Meredith S. Berry
Publication: *Institute for Tourism and Recreation Research Publications*
Download

**Gardiner, MT - Visitor Perceptions, Image, and Spending, 2013**
Authors: Meredith S. Berry, Norma P. Nickerson
Publication: *Institute for Tourism and Recreation Research Publications*
Download

**Gardiner, MT - A Community Tourism Development Case Study: Resident Perceptions**
Authors: Norma P. Nickerson, Meredith S. Berry
Publication: *Institute for Tourism and Recreation Research Publications*
Download

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**3. Effectiveness of marketing to vacationers**

I would like to see research that tests effectiveness of marketing to vacationers specifically (not pass through or business travelers etc.)

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**4. Economic Impact of the closure of the Yellowstone River**

Hi: I am wondering if ITRR could do a bit of research with regards to the economic impact of the Closure of the Yellowstone River on the Business Communities of Gardiner, Livingston, Big Timber and Paradise Valley.

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**5. Click-thru rates vs print advertising effectiveness**

I am wondering if you can do research on the effectiveness of industry standards on click through rates?

We are told that industry standards for click through rates are .06%. What that means is that for every 10,000 people who see that ad online only 1 person clicks on it.

What I don't understand is "just because this is industry standard, how do we know it is a good standard for our online ads and that it is effective in bringing people here?"

We are tasked more and more with doing online advertising because it is cost effective. Yet, are we sure that it is more effective than print advertising?

Also, we have the pressure of reducing the cost of our travel guides and some would like to see them go away. Yet, we run out of them. As I see, getting all the region information in the hands of visitors is more important than flashing a banner ad on the internet. The travel guide has longevity, it is likely that more than one person is looking at it, it includes a plethora of information that is much easier to see and page through than on a screen. It hits more of our target audience.

Is there any way that your research can help us understand more about the effectiveness of all of this on our targeted visitors? (not pass through and not business travelers)

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**6. Will NPS centennial visitors return to the park and was crowding an issue?**

A thought for your consideration. 2016 was the Centennial of the Park Service and as a result of the myriad promotions regarding this event, many NPS units experienced major increases in visitation. Did the increased numbers impact visitors desire to return? Did it hamper their enjoyment of the resources? Did they simply assume that congestion was inevitable and therefore it had no impact?

I'm just curious to learn if they will be returning to the parks, or are treating the experience as a one-off due to the Centennial advertising campaigns and don't plan any further visits.

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**7. #'s and projection of Asian visitors.**

I will continue to beat the drum about Asian visitors - we need to start measuring how many are coming and what the projections might be for future visitation. China seems to be #1 country, but what are the other countries of origin?

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**8. Conservation fee in Montana**

How much of a fee would tourists accept to help conservation efforts in the state parks? Could we add a $2 conservation fee onto all passes?

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**9. Economic impact of mountain biking on communities: Helena case study**

We would like to propose a study of the economic impact of mountain bike tourism in Helena, Montana.

Mountain bike tourism is a growing business for Helena and Montana. The community of Helena, Montana has invested in expanding mountain bike tourism in recent years. Our proposal to ITRR is to help measure the economic impact of mountain bike tourism for Helena, Montana. The results of this study could help other Montana communities measure the value of investment to this tourism market.

While there have been a number of economic impact studies of mountain biking in western states and cities in recent years including Idaho, Oregon, Wyoming, Washington, Arizona, California, New Mexico, Colorado, Utah, and British Columbia we are not aware of a study that has measured the impact of a Montana city as a mountain biking destination. While we can learn much from this previous research, we know the mountain bike tourism market in Montana, and Helena specifically is unique. For example, we are located further from large metropolitan population centers of Seattle, Portland, Vancouver BC, Salt Lake City, or San Francisco than the areas of previous studies. Helena is also not a gateway city to either Yellowstone or Glacier National Parks. While Helena does travel promotion as a destination halfway between the parks, the national parks are not as dominant draw to Helena as it is for other Montana mountain biking destinations. While the 2013 study on cycle touring did focus on the impact of Montana, the mountain bike tourist is a different market from the touring cyclist.

Why Helena? Montana has multiple mountain biking destinations. We propose Helena as the location of this impact study due to the focused efforts of the community to attract mountain bike tourism. In 2013 Helena was recognized as a Bronze Level Ride Center by the International Mountain Biking Association (IMBA). In 2015, Helena was promoted to a Silver Level Ride Center. Helena is the only Montana community with an IMBA Ride Center designation, and one of only 12 Silver Level Ride Centers in the world. The Helena business and trail user community have been very supportive of efforts to promote mountain bike tourism. Part of their support has been in hope and belief of the positive economic impact of the visiting mountain bikers enjoying our local breweries, restaurants and shops. Many local small businesses invest in this promotion through sponsorship of the Trail Rider, a free community shuttle that runs 5 days a week to access trails on the Continental Divide, Helena Ridge and Mount Ascension. An accurate study of the impact of mountain bike tourism in Helena will continue to help local businesses benefit from this growing market.

The 80 mile network of trails in Helena's South Hills spans over a variety of land owned by a combination of the City of Helena Parks Department, Prickly Pear Land Trust, Bureau of Land Management, and US Forest Service. These public land holders work together to offer these trails and pool their resources to maintain and develop trails for all trail users including locals and tourists, hikers and mountain bikers. User data would help these public lands organizations plan for growth, signage and the most effective management strategies for the future.

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**10. Do visitors use online hikewildmontana.org?**

With a grant from Montana Tourism, the Montana Wilderness Association recently launched an online trail guide at hikewildmontana.org. If possible, I'd love for this resource to be included in ITRR surveys asking visitors what resources they've used to plan their trip. I'd like to get a sense of how many people know about this resource and how useful it is to users.

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**11. Value of MT's public lands to businesses**

Year after year, Montana visitors report that it's the Montana mystique that draws them to this state - opportunities to hike, view wildlife, and enjoy majestic open scenery. Lately, there has been a lot of debate about the future of Montana's public lands and waters. Is it possible to quantify the value of Montana's public lands and, specifically, wildlands, to Montana businesses? What is the role of tourism businesses in determining how these lands are managed? What are tourism businesses' responsibilities to be good stewards of our natural resources? And what opportunities exist for businesses to give back to the trails and recreation infrastructure their clients use?

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**12. Measurement of public land contributions to tourism**
We have vast public lands in our region but the difficulty is the land management agencies' shrinking budgets (primarily because of fires) for maintenance. Budgets for promotion are about zero.

**13. Route choice**
Route choice is critical for a tourism region since we cover so much land. Our region doesn't have east-west interstates, just one north/south interstate. While we encourage travelers to explore and take the "road less traveled" we understand that the volume of travelers take interstates.

**14. What is the need for print literature- are times changing that much?**
Love to have ongoing research on this. It is changing but we still see demand for traditional forms of print literature.

**15. Expectation of outfitter's clients**
Research of guests of the recreation provider community that helps us all understand the importance of interpretation as a component of their selection of a provider, how it enhances or distracts from their trip, and what their expectation is of providers this day and age.

**16. Ripple effect of outfitters to other businesses**
Survey and statistical analysis that shows the ripple effect of the recreation service provider client and how many other businesses that client effects once they come to MT.

**17. Wages, overtime policies, benefits, and seasonal workers**
The recreation industry as well as the DL&I could really use wage surveys to establish base wages for recreation jobs, overtime policies, seasons of work and benefit packages provided.

**18. Outfitter clients- trip types, choices wanted, and booking window**
The recreation industry needs a better understanding of the types of trips and choices visitors are looking for. The perception is longer trips are no longer coveted, there also appears to be a much shorter booking window resulting in a lot of last minute bookings and visits. Trying to understand the ramifications on providers is important

**19. How, when, & why do clients on outfitted trips pick their outfitter**
The recreation industry could really benefit from knowing what people are using to find providers, and what the key selection criteria are. It would help to know the core attributes potential visitors look for, what their expectations are in turns of website, social media presence and response rates to inquiry as well as pricing expectations

**20. Regional economic and transportation Analysis: Yellowstone area**
As visitation to the Yellowstone area increases, there is a need to discover both the transportation movements within the region and the resultant economic impacts to regional businesses. It would be valuable for Montana to understand the driving patterns, spending, and travel characteristics of visitors to the area. Understanding visitor patterns in the Yellowstone region could suggest regional marketing cooperatives, regional transportation funding opportunities, and cooperative solutions to visitor impact on the resources. In addition, a landscape view of visitor spending could provide additional insight into how the region is tied together economically.

- What is the 'zone of influence' of the park? When a visitor's primary destination is YNP, how much do surrounding communities benefit? There will be a tapering of impact as we move away from the park. What does that look like? Can communities/region's increase marketing/advertising to draw visitors a little further out?
- Part of this question relates to how tourism development affects local residents. Are benefits and costs being distributed proportionately? How does intra-destination movement affect transport planning, marketing, and impact management?

- What are the human (demographics, SES, etc.), physical (attractions, physical environment, transport network), and trip factors (purpose, duration, etc.) that influence movement patterns of tourists.
- I've heard suggestions that return visitors get out and away from the park more. Can we demonstrate this?
    - Familiarity with the destination is determined to exert a significant effect on movement patterns, and could therefore predict the extent of the area visited.
    - Activity participation and motivation increases the explanatory power and understanding of tourist behavior related to the spatial extent of the destination visited and the transport mode selected.
    - Cultural/Historic experience seekers conduct more intra-region travel than do motivated by being "physically active" or engaged in "sports and renting equipment" – (Masiero and Zoltan, 2013)
- This can be approached through similar means as we currently do - survey and ask to identify where they travelled or will travel, etc. There are also fancier ways to do it, if DOTs want to get involved and provide some $$…such as using GPS data loggers or phone Apps.

In 2015, Yellowstone experienced a 17% increase in visitation over 2014, surpassing four million visits for the first time ever. Although the park had not seen an annual increase in visitation of over 10% in more than 25 years, this dramatic spike comes after 15 years of steady growth. As climate changes, increased visitation in shoulder seasons is becoming an increasingly common trend. Growth in visitation among East Asian and Mandarin speaking visitors is especially high.

Visiting National Parks represents a relatively small portion of the time and money that visitors spend on a trip to the Greater Yellowstone. Especially with visitation increasing, parks are only equipped to provide a limited amount of visitor support services. Gateways communities, state departments of tourism and transportation, and a large number of regional businesses and organizations have need to better understand these changing trends in regional tourism, transportation, and socio-economic patters.

*Potential funding partners:*

- Yellowstone National Park
- Grand Teton National Park
- WY, MT, and Idaho Departments of Transportation
- WY, MT, and Idaho Departments of Tourism

**21. Peer-to-peer accommodation rentals**

Airbnb, VRBO, HomeAway and other ways for visitors to rent a room are becoming popular around the world but it seems Montana does not have a handle on how many places are being rented and whether or not they are legally collecting and submitting the bed tax. A quick search of places available in a few communities on Airbnb showed the following: Billings 76; Belgrade/Big Sky/Bozeman 306; Butte 46; Dillon 7; Gardiner/Emigrant/Livingston…288; 57; Great Falls 15; Helena 71; Kalispell/Whitefish 306; Glendive 1; Miles City 2; Missoula 287; Red Lodge 65; Sidney 7; West Yellowstone 276. Some of these are hotel rooms but many are homes or a room in a house. It appears there is significant overlap in the listings, but the actual number and impact on tax collections is unknown.

- What regulations are in place?
    - Variation between towns? Missoula Council has been discussing
- What is the failure to collect bed tax impact?
- Can we correlate this info with current/recent lodging data?

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**22. International Tourism Patterns, Values, and Communication: Parks, Gateway Communities, and Beyond**

*Background and Aims of Research*

The U.S. National Park System (NPS) has experienced significant growth in visitation by attracting nearly 300 million visitors from around the country and world to its hundreds of diverse park units (Hetter, 2015). In the past decade, there has been an increase in international tourism to many iconic national parks in the United States, including Glacier and Yellowstone. This expansion in tourism, and in particular with the Chinese, can be attributed to rapid economic growth and a rising middle class with income to spend on travel partnered with reduced travel and visa restrictions (Agrusa et al., 2011; Packer, Ballantyne, & Hughes, 2014).

As one of the most popular NPS destinations, Yellowstone National Park (YNP) broke records in 2015 with over 4 million visitors, a 17% increase from 2014 (Yellowstone National Park, 2016). YNP has swelled in Chinese visitation within the park and the surrounding gateway communities with 40% of Chinese tourists to the U.S. visiting a national park or monument during their stay (National Travel and Tourism Office, 2015a). There are many positive aspects of increased Chinese tourism to Yellowstone such as an economic boost in gateway communities and within the park as Chinese tourists spend more on average than other tourists (Attract China, 2015; Booker, 2015). In addition, word of mouth is directly influenced by visitor satisfaction; therefore, Chinese tourists can indirectly impact destination imaging and marketing through their interactions with others before and after their travel (Agrusa et al., 2011; Mao & Zhang, 2014).

However, the park and the adjacent communities are faced with many challenges that can inhibit the management of the park's resources and the international tourists' experience. Some of these challenges are associated with barriers in communication, vehicle safety, human-wildlife conflicts, behaviors around thermal areas, and differing expectations of their national park experience (Yellowstone National Park, 2016). Previous studies have identified differences in Chinese visitors' perspectives on nature and environmental issues as well as trip expectations (Packer et al., 2014). In addition, Chinese tourists want to engage in typical local experiences and make the connection between the natural resources and the culture (Agrusa et al., 2011). Understanding these comparisons can help in design of tourist programs and messaging that cater to the specific values and desired experiences of Chinese and international tourists while also addressing human-wildlife conflicts and understanding of management practices (Packer et al., 2014).

Despite these gaps in understanding and the continuous increase in international tourists to Yellowstone and other national parks, there are limited studies investigating the motivations and expectations of international and in particular Chinese tourists in the U.S. national park setting, their understanding of the management practices, and the best strategies for communication and interpretation. If the National Park System and its gateway communities want to attract and sustain diverse visitation, a cookie-cutter approach will be insufficient to meet the broad goals of ecotourism. With the growing international tourism market, it will be essential for national parks and gateway communities to develop interpretation and programs in the native language and based on sound research of international visitors' prior knowledge, experiences, and attitudes towards nature-based tourism (Packer et al., 2014). This research can inform critical management issues and support the national parks and gateways communities maintaining a competitive advantage with the Chinese and other international tourism market and sustain positive experiences and visitation in the future (Mao & Zhang, 2014).

To address these challenges and to inform development of visitor experiences and interpretive programs and materials to meet the needs of international tourists, park management, gateway communities, and statewide tourism planning and marketing, this research aims to: 1) gain a better understanding on international tourist travel patterns and planning, 2) gain a better understanding of international tourists' attitudes towards national parks, wildlife, and wildlife management; 3) expectations and satisfaction of national park and gateway community experiences; 4) identify the desired communication and interpretation strategies to communicate information, rules, and management, and 5) inform strategies for international marketing of Montana destinations.

*Implications of Research*

This research will have implications for Montana's national parks, its gateway communities, the tourism operators, and

to the broader tourism discipline. The findings will address some of the major issues that have been identified by park management and will help improve communication and engagement between national park staff and international tourists. Gateway communities will gain a baseline understanding of international tourists' levels of satisfaction, their preferences, and travel plans to better accommodate the needs of the changing market and strategically market their community as a tourist destination. The research findings will also support international tourism operators in improving the design and provisions of their tours to and strengthen relations and communications between national parks and the tour operators to reduce conflicts inside and outside the park. Lastly, this research will benefit the broader tourism industry to gain a better understanding and build on our limited knowledge of international tourists to Montana. As an innovative and novel research approach can serve as a template for further research in the Montana area and other national park destinations experiencing similar influxes of international tourists or seek to attract this market.

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**23. Who were the NPS Centennial visitors?**

Because the National Park Service reported visitation increases do not seem to be reflected in the Smith Travel Reports (i.e. increased lodging occupancy), or other metrics, the question is: Can ITRR determine the sources of the increases for Glacier Park and Yellowstone Park visitation in 2015 and 2016? Are the increases due to more residents day-tripping to visit the Parks (or visiting more frequently)? A perfect example of this being the 32% increase in visitation to Glacier during May 2016 while Whitefish actually showed a small decrease in Resort Tax collections for lodging that month. Are they the increase in visitation a result of the NPS's Fourth Graders promotion? What percentage are destination vacationers? What percentage of the increase is from China and/or other International? How are the increases distributed seasonally?

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**24. Will visitors use public transportation?**

Have questions ever been asked about using public transportation? Can question or questions be added to the quarterly nonresident study about whether the traveler from out of the area would use more public transportation (shuttles) if they were available? Where would they be willing to go on public transportation- to/from national park shuttle systems, to/from hiking trail heads, to/from restaurants, etc.

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**25. What is today's booking window?**

The booking window for travel has decreased since the U.S. economic downturn. Some lodging properties and the ski resort have told us that, with the exception of mid-summer, it is not common for a booking window to be within a month. Could we add a quarterly nonresident questions asking how far in advance people book their itineraries and then sort by quarter collected (seasonally)?

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**26. Vacation rental homes & rooms impact on lodging and expenditures**

Of course, the vacation rental question is still out there. I'm not exactly sure how to get at that (i.e. impact on lodging, expenditures, etc)…. However that is extremely important to figure out.

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**27. Impact and characteristics of mt. bike trails and cycling events**

The state of Montana draws people from all over the world to recreate in our great outdoors. The ITRR research on multi-day cyclists (ANALYSIS OF TOURING CYCLISTS: IMPACTS, NEEDS, AND OPPORTUNITIES FOR MONTANA) conducted in 2013 provided excellent data regarding existing impacts, conditions, and needs. Today, the state needs a second tier of research that measures and documents the current impact and potential opportunities of trails and cycling events.

Residents and non-residents alike travel across the state to participate in events (both races and rides) such as RATPOD, STOKR, the Enduro Mountain Bike Series and fall cyclo-cross races.

In addition, trails attract people from across the region. Casual cyclists might enjoy our paved trails while mountain bikers come from all over to enjoy the vast mountain bike trail opportunities. Even our ski areas are getting into promoting this as a summer activity for tourists.

To get the full picture of how bicycle tourism impacts the state of Montana and to really understand this demographic's potential, it is important to get a full picture of what bicycle tourism and travel is. Research into rides, races, other events and our trails would help the state of Montana understand and cater to this important and growing tourism segment.

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**28. The impact of festivals on Montana's economy**

Are Montana festivals economic drivers for the state's tourism industry? Do travelers come to the state to attend festivals or are they already here and decide to include them in their travel plans? If they do, does this extend their stay and lead to greater tourism impact for Montana's communities?

Festivals to look at for their impact as tourism drivers --

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## Submissions that are not research

**NR1: Highway improvement and bike lanes/shoulders**

It seems to me that a statewide effort to improve highways, to add wide bike lane style shoulders, as they are being rebuilt, would be a great long term benefit for the entire industry.

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**NR2 Bike path development**

I think the development of extensive safe bicycle paths through Paradise Valley connecting towns and the diverse points of beauty and interests will be a great evolutionary step in the art of health promoting recreational tourism. A Yellowstone river bicycle path for instance!

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**NR3 Public land voluntourism – for your health and the land's health**

I live in Essex. Most of our vacation renters are over 50 as are most of the permanent and second home persons. Glacier Park and the forest and wilderness areas need more trails and care (weed spraying, minor clearing and cutting back of overgrowth, etc.). Older people need more exercise. Could we promote a help the forest and Park and yourself program led by area people and used also by visitors to spray, pull noxious weeds, clear and create paths, etc.? This hasn't been done yet because it is extremely difficult to change the regulation and insurance worries but perhaps an entity such as yourself could find a way.

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**NR4 Promotion ideas and concerns**

As a small resort owner centrally located in flathead valley, there are a few comments and recommendations as we see from our own perspective and our guests input. We get guests from around the world. 90% coming to see Glacier Park for the first time. We are starting to get some return guests due to their great experience here and our many 5 star reviews

1. We feel an obligation to let guests know that the going-to-the Sun Road does not always open around the 15th of June each year. (due to snow/avalanches) We do let them know there is plenty to do and that the park is open all year.

So many guests believe the lodges are open and everything else. More businesses that advertise and especially whether print or digital, need to be more specific on their hours of operation (season) Many people and especially families with kids are mislead by other rentals that do not mention the above and are disappointed when they arrive.

2. I know getting help is a major issue especially after school starts, but September seems to be a missed opportunity for promoting more visitors to our parks and Montana in general. Especially couples.

3. Our restaurants in our region are very reasonably priced compared to most tourist destinations. Excluding some grocery stores and of course, Huckberry pie. LOL. Whitefish has been moving towards Jackson Hole prices. We should promote the reasonable costs to vacation here In Montana.

4. I believe we are losing additional revenue by the fact, Glacier International Airport is very expensive to fly into. I know its revenue is increasing every year, but a large majority of our guests will fly into Spokane, WA and stay a night or two then rent a car and drive here. That limits their time here. Also getting people flying into other cities for lower rates like Missoula and Great Falls. At least they are coming into MT. We believe better rates would bring more tourists directly into Glacier International Airport and spend more of their dollars here than letting them fly to the State of WA.

A few last comments.... Our guests have not complained much about the park being too crowded as we are fairly close. They can easily drive there different days of the week to access different areas. However, it is important we continue to find ways to alleviate too much traffic. We believe one of the best experiences and that help eliminate the sun road traffic is the Red Bus Tours.

Also, we understand all hotels and resorts cannot provide bear spray for their guests as we do. If they buy them, they cannot take them on an airplane. But guests need more Information on our potential wildlife encounters and hiking dangers in all of MT parks.

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**NR5 Business development, tourism employment, promotion**

Development: How can we develop Native American businesses to meet the needs of the tourists - Sun Tours in Glacier Park is a great example of this type of business.

Measurement: How can we market tourism jobs to Montana residents? Lots of companies employ J-1 students to work as opposed to using local talent.

Travel Behavior: How are “branded” motels and their marketing affecting the independent motel owners around the parks? What do the independent owners need to offer to compete?

Travel Promotion: How can the state of Montana partner with the smaller resort towns in developing a booking site for the town? Can the state of Montana utilize virtual reality to allow people to experience the beauty of Montana?

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**NR6 How do communities highlight and develop recreation**

Across Montana, towns are turning from timber and mining and looking to a future focused on tourism and outdoor recreation. What are communities doing to highlight successfully nearby recreation opportunities, build an attractive tourism infrastructure, and redefine themselves to be competitive in the New West? What can other communities learn from these case studies?