

Summary of FY19 and FY20 project status to date

- [2019 Economic Contribution of Nonresident Travel Spending in Montana Travel Regions and Counties](#) Spending was up 5.4% over 2018 to \$3.77 billion. Glacier and Yellowstone regions received 65% of all nonresident spending.
- [Eastern Montana Data Growth: 2019 Initiative to Increase Data Collection](#) ITRR was able to increase intercepts from 8% to 15% of all nonresident visitors; The average length of stay in Montana was 4.3 for all travelers compared to 4.9 for those who spent a night in Eastern MT.
- [Using Tourism to Recruit New Business: Tourism's Role in Economic Development](#) 26% of business owners who did not grow up in Montana, had previously vacationed in Montana and later decided to move here. Quality of life is, on average, the most important reason for starting or relocating a business in Montana.
- [Canadian Travelers - Why they Visit Montana](#) Exchange rate is the predominant predictor of # of Canadian Visitors and their spending in MT. 45% passed thru in 2018 (up 4% in 5 years); 32% on vacation (down 5% in 5 years); 15% shopping (down 16% in 5 yrs).

4 traveler surveys (resident and nonresidents) and 4 business surveys related to COVID impacts

- [Survey: Montana Tourism Anxious as COVID-19 Impacts Continue, Travelers Feel Safer](#)
- [COVID-19 Impacts on Tourism-Related Businesses: Thoughts and Concerns](#)
- [2019 Nonresident Visitation, Expenditures & Economic Impact Estimates](#)
- [Tourism-Related Business Owners Speak Out About COVID-19 Impacts](#)
- [COVID-19 Concerns Montana Travel-Related Businesses and Travelers](#)
- [Montana's travel industry is already feeling the impact of the coronavirus](#)
- [National Economic Conditions of Large Concern as Travelers Weigh Their Options Amidst Outbreak—Montana Currently Faring Better than Most](#)

Current studies

- **FWP Yellowstone River usage** – Concentrated data collection at 9 FAS's from Emigrant to Livingston. 216 Observation data forms recorded and 1,039 intercept surveys completed. Data collection July-mid Sept. River observations include type of craft; # of people; activity (fishing vs non fishing); FAS observations include # of boats and people; and activities at FAS; Intercept data includes group size, type of activities (camping, fishing, picnic, swim, etc.), location of put-in and take out.
- **FWP state parks visitor monitoring** – 66 state park entrances monitored. Field monitoring work May thru September, with an estimated 1,854 hours invested. Key pieces of information, to help inform methodological efforts, that have been collected include:
 - Time and date of entry; Type of entry (vehicular, pedestrian, cyclist, other); # people/vehicle; Residency status (per license plate); Special characteristics of the visit (did visitor arrive in or bring a camper, did visitor arrive with a boat or other watercraft); Notations about any special circumstances that could impact visitation (for instance, an event nearby, a road closure, etc.); Temperature and weather conditions
- **Resident attitudes study** – 2,197 residents responded; attitude toward tourism has decreased and is at an all time low. 72% of residents were concerned about visitors to their community because of COVID. Half feel their community is getting crowded due to tourism. See short summary attached. Additional attitude questions are currently being asked regarding their perception of visitor behavior.
- **Short term rental study** – Literature review on impacts of STR's and interviews of government officials in cities and counties is being conducted. A panel survey of travelers was completed by 1,400 respondents this past week and analysis will begin shortly.

Approved Studies not yet started for FY21

- Negative/Positive Press/Social Media Impacts on Travelers
- Projected Impact of Visitation Caps in Glacier NP