



# Voices of Montana Tourism

## The Value of Tourism For Montana

Gardiner

December 19, 2019



# Education & Outreach

## How Voices Tells the Story

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





# Education & Outreach

- Define Tourism
- Economic Update
- Opportunities
- Discussion

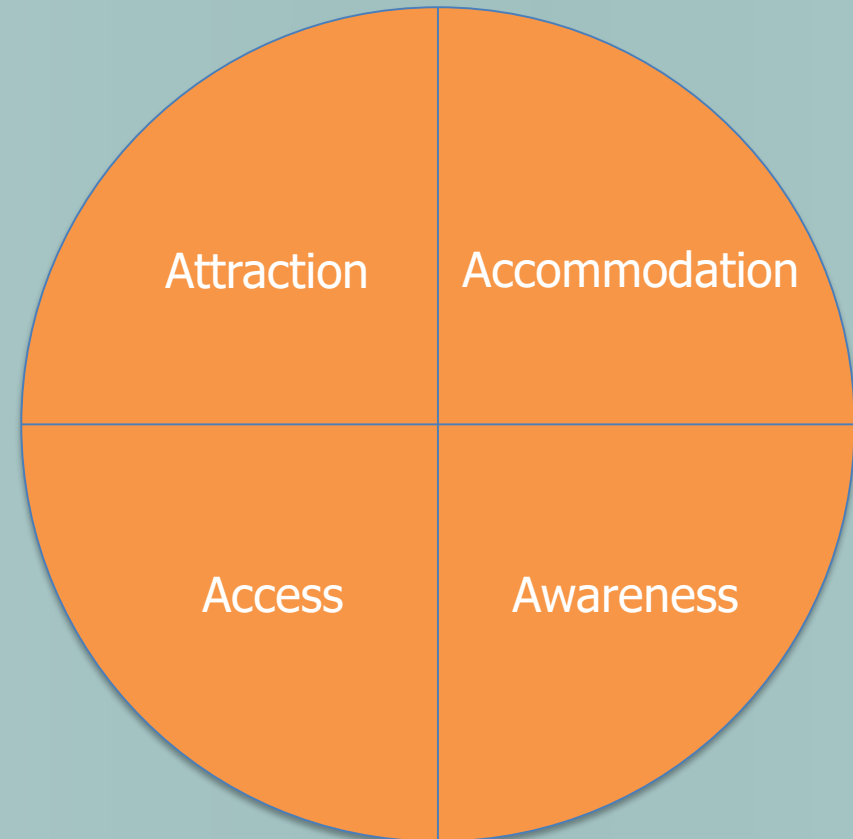


**JOBS - COMMUNITY - ECONOMY**



# Four Components of Tourism Economy

- **Attraction** – manmade and natural attractions which satisfy visitors' educational, recreational, cultural needs
- **Accommodation** – establishments that offer place for people to stay, eat, shop - welcoming
- **Access** – transportation methods to reach destination
- **Awareness** – draw attention to area to promote visitation/sales



## Travel Marketing and Promotion

PRODUCTS COMMERCIAL BRAND  
MARKETING ADVERTISEMENTS  
PRODUCT RESEARCH  
INTERNET MEDIA  
CAMPAIGN SOCIAL MEDIA MESSAGES  
BRANDING RADIO

## Increased Visitor Trips



TRAVEL  
PROMOTION'S  
VIRTUOUS  
CYCLE



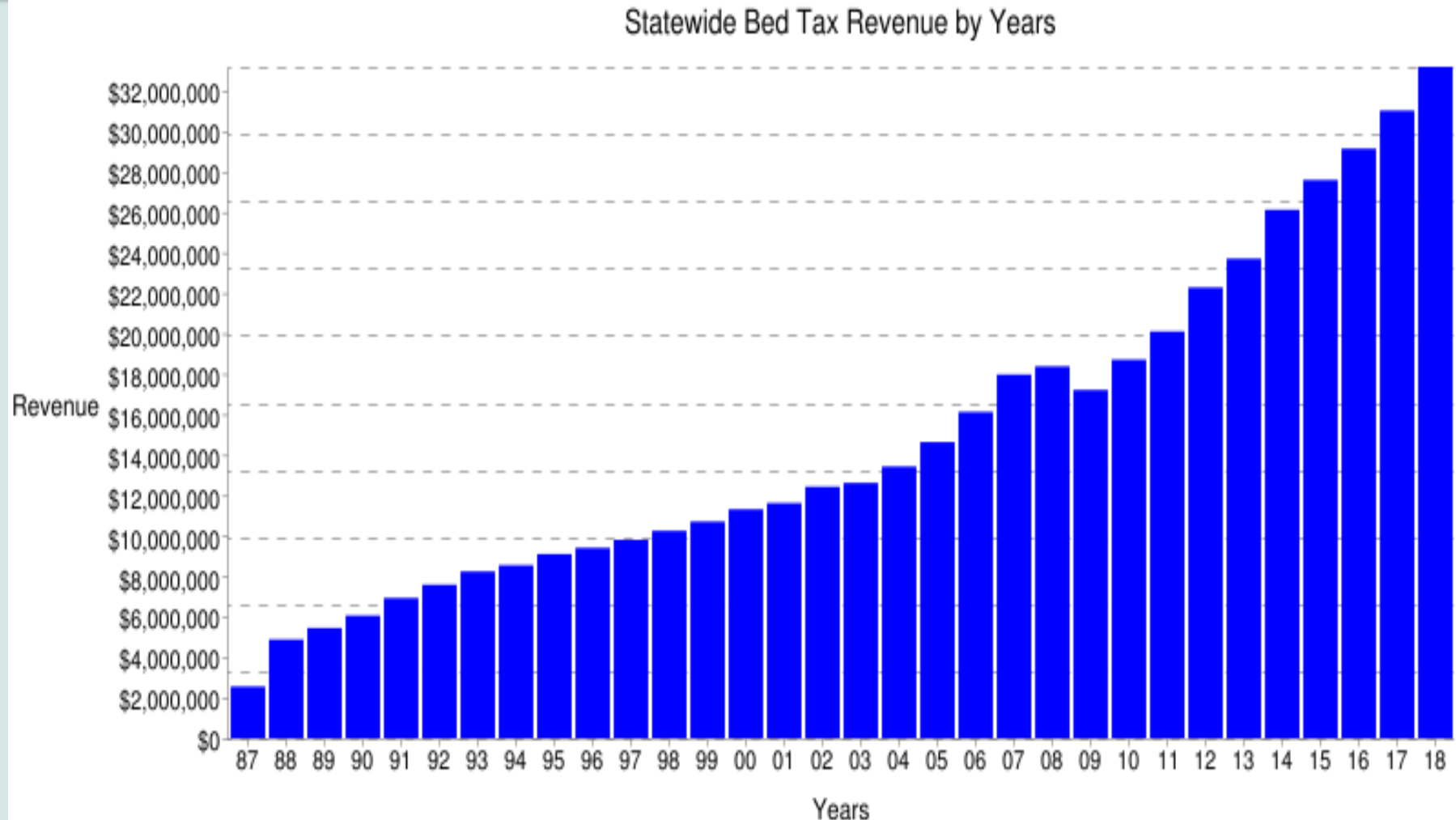
## New Jobs & Tax Revenues



## Additional Visitor Spending



# MT Bed Tax History





# Funding Sources

3% Bed Sales Tax

\$27.7 Million General Fund

4% Lodging Use Tax

\$34.6 Million State Programs

1% Bed Sales Tax

\$8.25 Historical Assets

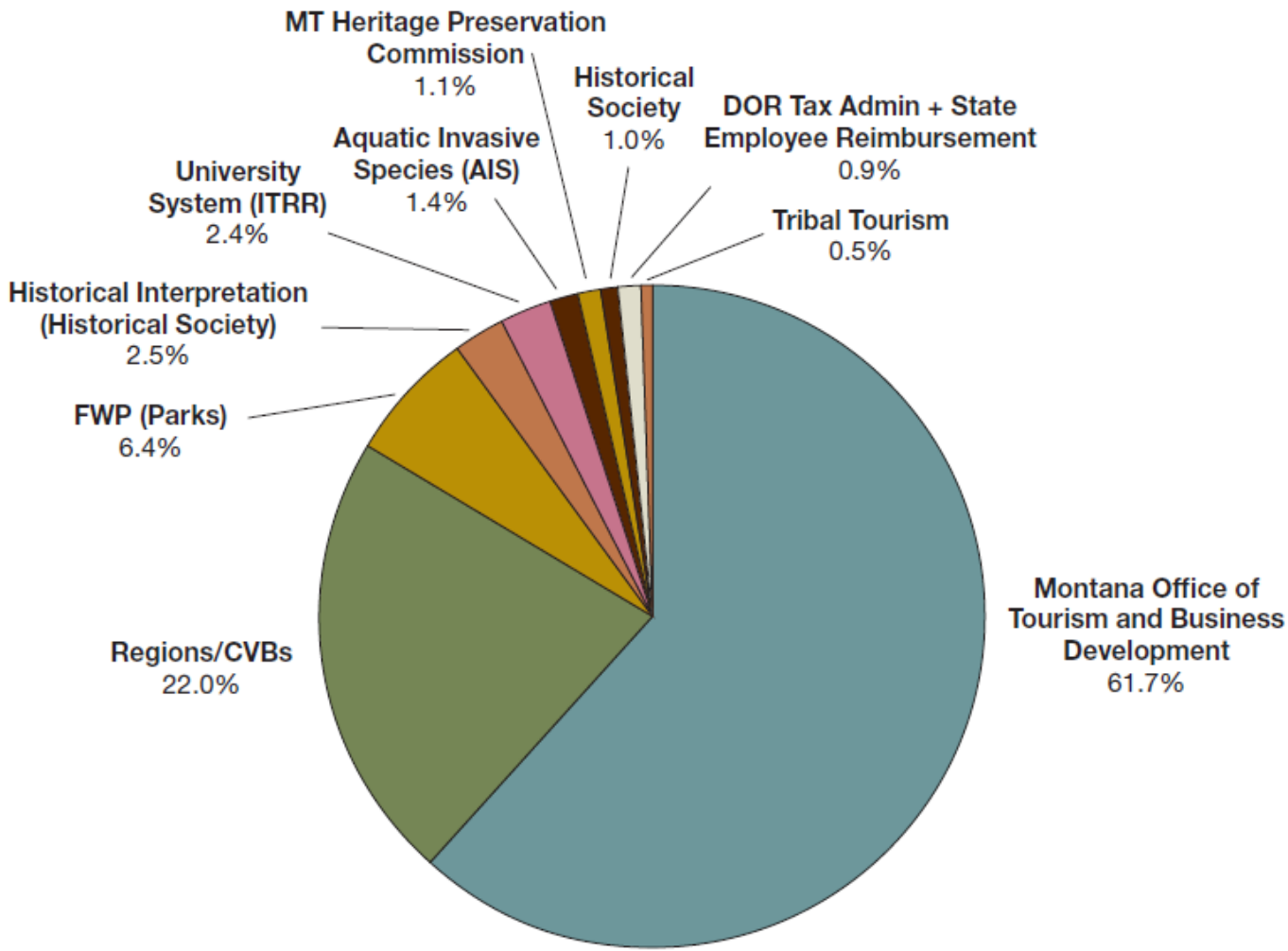
## Revenues

January 1, 2020





# DISTRIBUTION OF 4% LODGING FACILITY USE TAX







# Return On Investments

**Tourism** is a leading industry in Montana!

In 2018, **12.4 million** non-resident visitors:  
spent **\$3.7 Billion**,

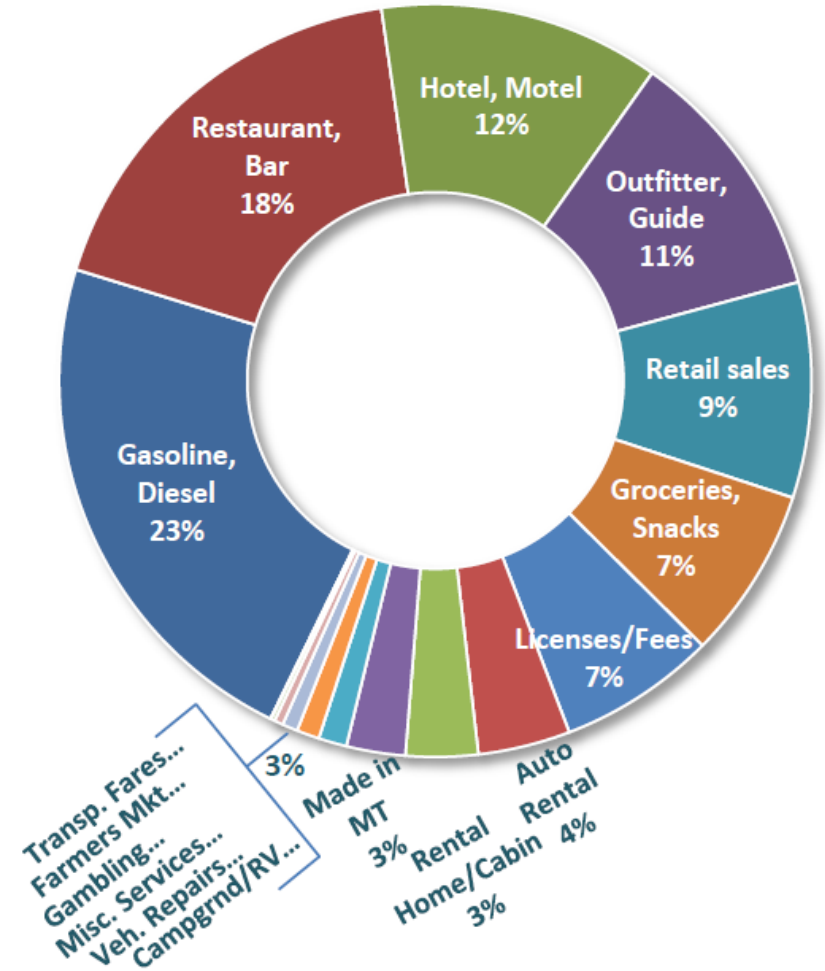
- supported **59,330 jobs** statewide - **\$1.51 billion** in salaries,
- generated **\$230 million** in state & local taxes and
- lowered taxes on each Montana household by over **\$545.00**

\* Data is based on final report published April 2019 by ITRR

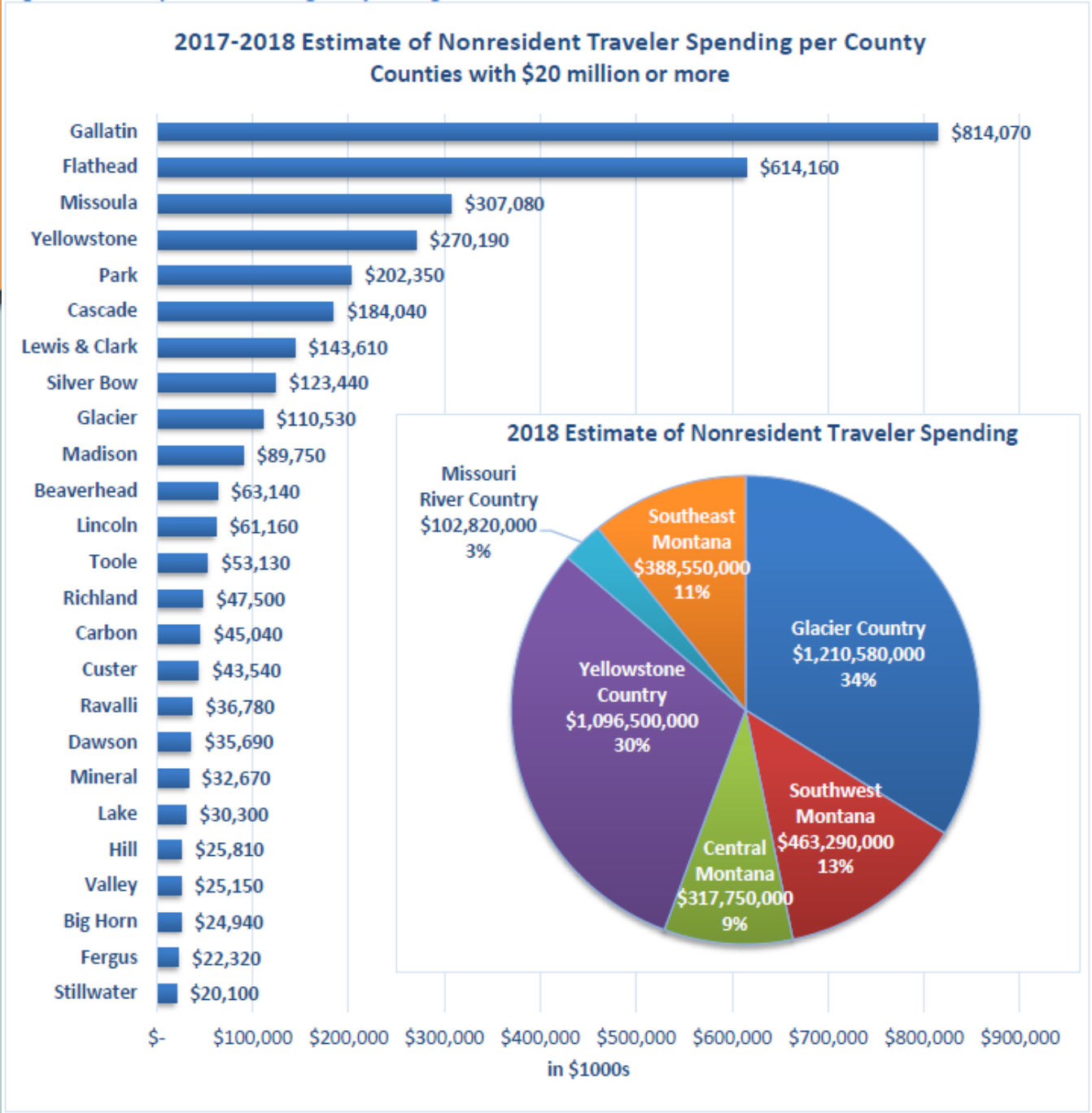
**Table 1 - 2018 Nonresident Traveler Expenditures<sup>1</sup>**

Expenditure Category	Average Daily Per Group <sup>2,3</sup>	Allocation by Category	Total Expenditures <sup>2,4</sup>
Gasoline, Diesel	\$33.12	23%	\$839,690,000
Restaurant, Bar	\$26.54	18%	\$668,150,000
Hotel, Motel	\$17.87	12%	\$449,710,000
Outfitter, Guide	\$16.52	11%	\$410,110,000
Retail Sales	\$13.63	9%	\$344,570,000
Groceries, Snacks	\$10.95	7%	\$275,380,000
Licenses, Entrance Fees	\$10.28	7%	\$252,130,000
Auto Rental	\$5.89	4%	\$147,730,000
Rental Home, Cabin	\$4.64	3%	\$115,490,000
Made in MT	\$3.79	3%	\$94,310,000
Campground, RV Park	\$1.80	1%	\$45,210,000
Vehicle Repairs	\$1.44	1%	\$36,330,000
Misc. Services	\$1.00	1%	\$24,550,000
Gambling	\$0.54	<1%	\$14,060,000
Farmers Market	\$0.27	<1%	\$6,450,000
Transportation Fares	\$0.03	<1%	\$690,000
<b>Estimated Total</b>	<b>\$148.30</b>		<b>\$3,724,550,000</b>

**2018 Expenditure Allocation by Category**



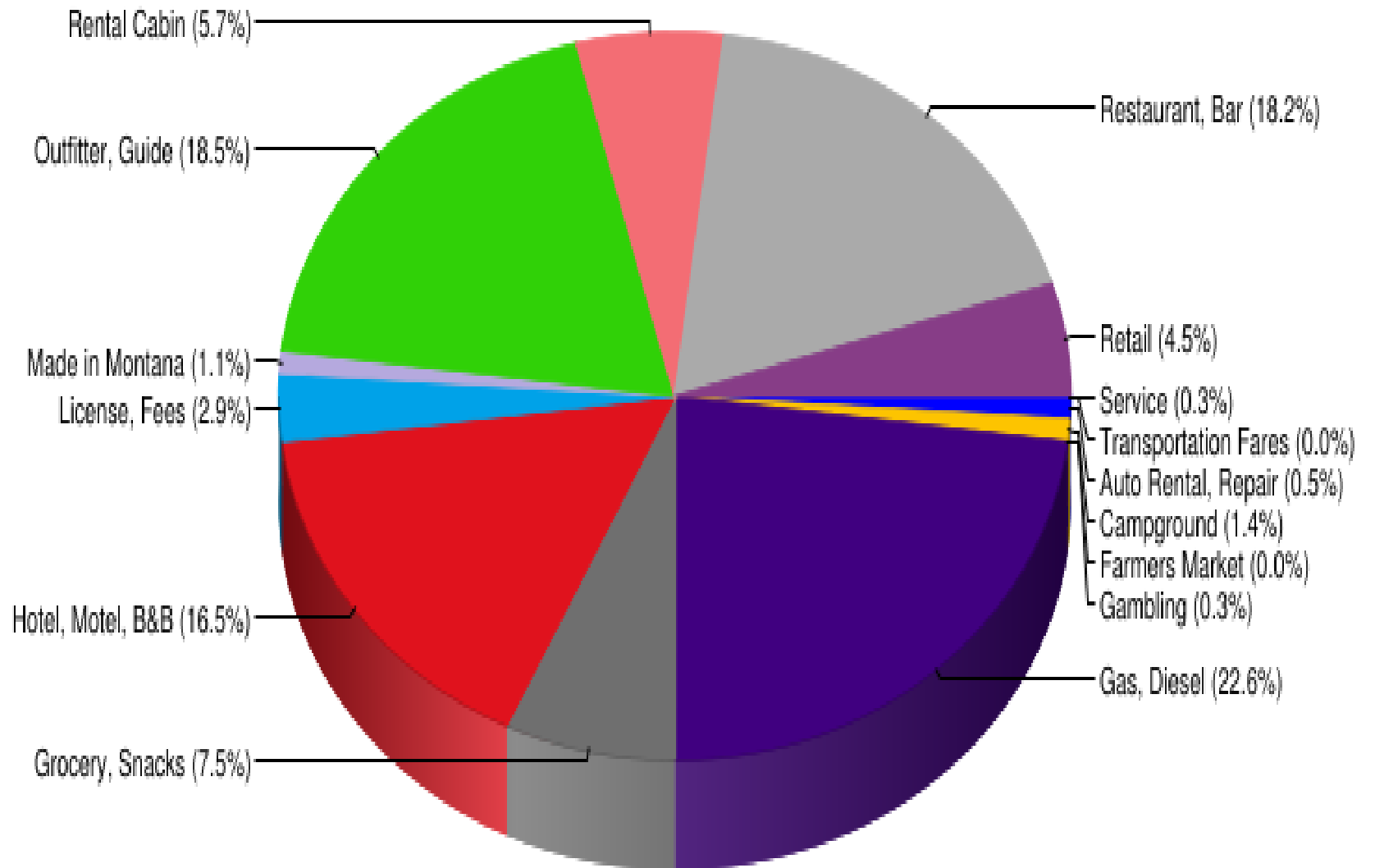
# Nonresident spend per county





# Park County Spend 2018

2018 Nonresident Expenditures % for Park County: \$202,349,000





# Montana Bed Tax Collections

	<u>2007</u>		<u>2008</u>		<u>2009</u>		<u>2010</u>		<u>2011</u>	
1/1 - 3/31	\$3,056,377	(+9%)	\$3,346,472	(+9%)	\$2,958,645	(-12%)	\$2,876,459	(-3%)	\$3,218,844	(+12%)
4/1 - 6/30	\$4,285,479	(+14%)	\$4,496,795	(+5%)	\$4,165,802	(-7%)	\$4,441,809	(+7%)	\$4,604,715	(+4%)
7/1 - 9/30	\$7,647,039	(+12%)	\$7,710,880	(+1%)	\$7,397,218	(-4%)	\$8,411,240	(+14%)	\$8,996,232	(+7%)
10/1 -12/31	\$2,977,332	(+10%)	\$2,818,847	(-5%)	\$2,679,927	(-5%)	\$2,969,152	(+11%)	\$3,272,133	(+10%)
<b>Total:</b>	<b>\$17,966,228</b>	<b>(+11%)</b>	<b>\$18,372,994</b>	<b>(+2%)</b>	<b>\$17,201,592</b>	<b>(-6%)</b>	<b>\$18,698,660</b>	<b>(+9%)</b>	<b>\$20,091,923</b>	<b>(+7%)</b>

	<u>2012</u>		<u>2013</u>		<u>2014</u>		<u>2015</u>		<u>2016</u>	
1/1 - 3/31	\$3,536,530	(+10%)	\$3,858,015	(+9%)	\$4,111,789	(+7%)	\$4,472,342	(+9%)	\$4,514,862	(+1%)
4/1 - 6/30	\$5,261,618	(+14%)	\$5,651,985	(+7%)	\$6,310,517	(+12%)	\$6,755,003	(+7%)	\$7,328,565	(+8%)
7/1 - 9/30	\$9,842,968	(+9%)	\$10,539,258	(+7%)	\$11,502,396	(+9%)	\$12,158,820	(+6%)	\$13,121,214	(+8%)
10/1 -12/31	\$3,623,664	(+11%)	\$3,641,726	(+0%)	\$4,177,921	(+15%)	\$4,244,673	(+2%)	\$4,403,274	(+4%)
<b>Total:</b>	<b>\$22,264,780</b>	<b>(+11%)</b>	<b>\$23,690,983</b>	<b>(+6%)</b>	<b>\$26,102,622</b>	<b>(+10%)</b>	<b>\$27,630,837</b>	<b>(+6%)</b>	<b>\$29,367,915</b>	<b>(+6%)</b>

	<u>2017</u>		<u>2018</u>		<u>2019</u>	
1/1 - 3/31	\$4,835,801	(+7%)	\$5,229,747	(+8%)	\$6,222,307	(+19%)
4/1 - 6/30	\$7,789,563	(+6%)	\$8,350,875	(+7%)	\$9,059,581	(+8%)
7/1 - 9/30	\$13,902,846	(+6%)	\$14,596,010	(+5%)	\$15,038,252	(+3%)
10/1 -12/31	\$4,520,887	(+3%)	\$5,186,725	(+15%)	\$0	(+0%)
<b>Total:</b>	<b>\$31,049,098</b>	<b>(+6%)</b>	<b>\$33,363,357</b>	<b>(+7%)</b>	<b>\$30,320,140</b>	<b>(+8%)</b>





# Gardiner Bed Tax Collections

	<u>2007</u>			<u>2008</u>			<u>2009</u>			<u>2010</u>			<u>2011</u>		
1/1 - 3/31	\$5,533	(+47%)		\$7,266	(+31%)		\$6,556	(-10%)		\$6,820	(+4%)		\$7,347	(+8%)	
4/1 - 6/30	\$39,891	(+27%)		\$57,853	(+45%)		\$57,144	(-1%)		\$64,407	(+13%)		\$61,586	(-4%)	
7/1 - 9/30	\$88,374	(+23%)		\$113,684	(+29%)		\$121,886	(+7%)		\$132,008	(+8%)		\$135,858	(+3%)	
10/1 -12/31	\$10,445	(+30%)		\$11,314	(+8%)		\$13,102	(+16%)		\$15,238	(+16%)		\$13,686	(-10%)	
<b>Total:</b>	<b>\$144,244</b>	<b>(+26%)</b>		<b>\$190,118</b>	<b>(+32%)</b>		<b>\$198,689</b>	<b>(+5%)</b>		<b>\$218,474</b>	<b>(+10%)</b>		<b>\$218,476</b>	<b>(+0%)</b>	

	<u>2012</u>			<u>2013</u>			<u>2014</u>			<u>2015</u>			<u>2016</u>		
1/1 - 3/31	\$6,788	(-8%)		\$7,771	(+14%)		\$8,642	(+11%)		\$11,387	(+32%)		\$13,999	(+23%)	
4/1 - 6/30	\$66,689	(+8%)		\$73,904	(+11%)		\$83,220	(+13%)		\$92,320	(+11%)		\$132,837	(+44%)	
7/1 - 9/30	\$141,622	(+4%)		\$144,377	(+2%)		\$166,105	(+15%)		\$185,362	(+12%)		\$250,029	(+35%)	
10/1 -12/31	\$14,585	(+7%)		\$8,462	(-42%)		\$16,345	(+93%)		\$20,959	(+28%)		\$24,587	(+17%)	
<b>Total:</b>	<b>\$229,684</b>	<b>(+5%)</b>		<b>\$234,514</b>	<b>(+2%)</b>		<b>\$274,313</b>	<b>(+17%)</b>		<b>\$310,028</b>	<b>(+13%)</b>		<b>\$421,452</b>	<b>(+36%)</b>	

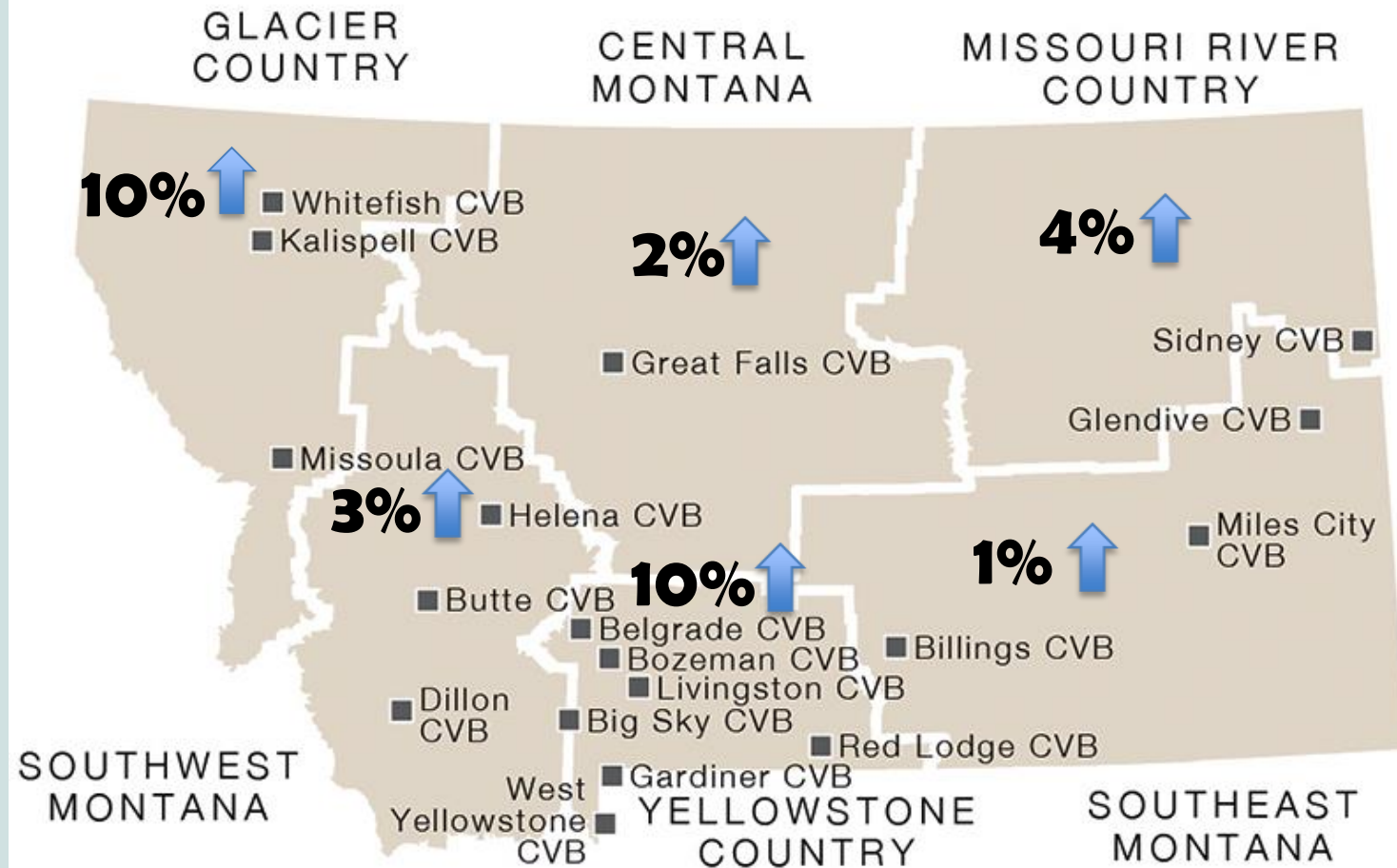
	<u>2017</u>			<u>2018</u>			<u>2019</u>		
1/1 - 3/31	\$16,870	(+21%)		\$15,979	(-5%)		\$23,096	(+45%)	
4/1 - 6/30	\$148,589	(+12%)		\$152,616	(+3%)		\$170,251	(+12%)	
7/1 - 9/30	\$248,979	(-0%)		\$261,880	(+5%)		\$249,622	(-5%)	
10/1 -12/31	\$24,876	(+1%)		\$21,022	(-15%)		\$0	(+0%)	
<b>Total:</b>	<b>\$439,314</b>	<b>(+4%)</b>		<b>\$451,498</b>	<b>(+3%)</b>		<b>\$442,969</b>	<b>(+3%)</b>	





# 2019 % Change Collections Through Q3

8% ↑





# Resident Traveler Research

Montanans  
tour  
Montana  
too!



Montana residents took 13.5 million day trips spending \$1.7 billion and 4 million overnight trips spending \$1.2 billion

\$2.87 billion in resident consumer spending across Montana





# Measuring impact vs. contribution

INSTITUTE FOR  
**TOURISM & RECREATION RESEARCH**  
UNIVERSITY OF MONTANA

\$3.7 Billion

Non-resident spending on consumer goods during trip

\$2.87 Billion

Resident spending on consumer goods during trip



\$7.1 Billion

Consumer spending on outdoor recreation - including locals and visitors and all gear, technical clothes and vehicles involved to be outside.



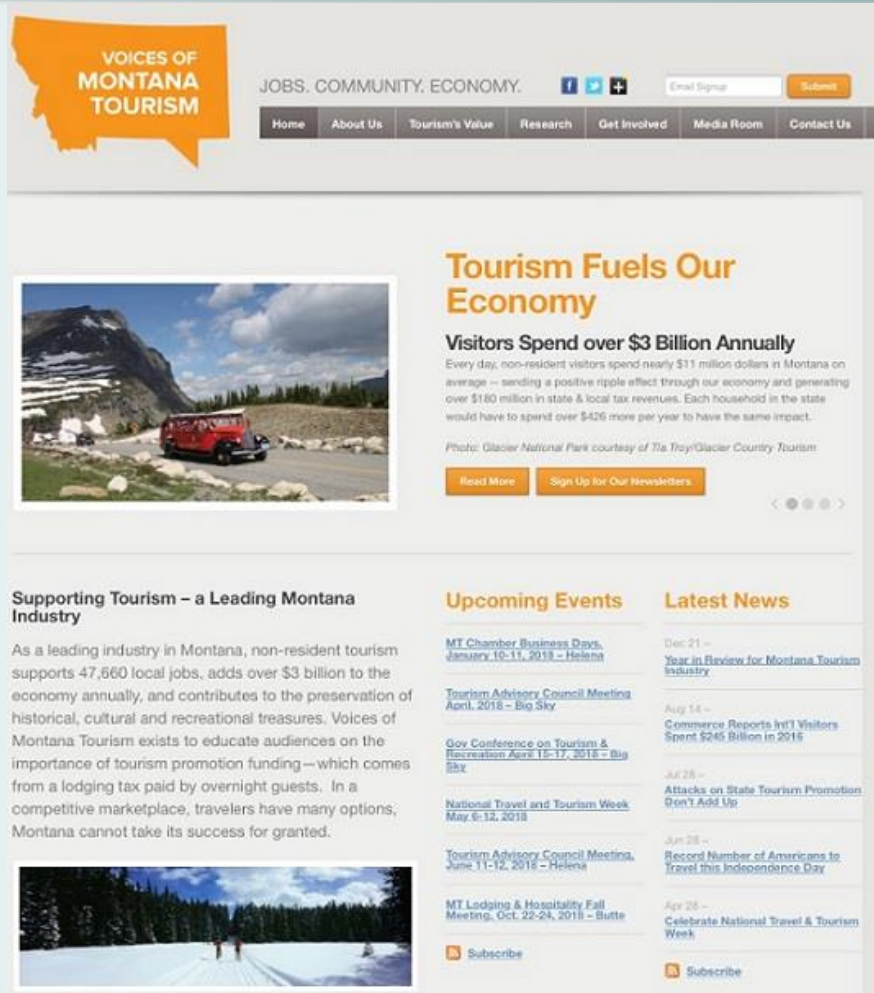
# Tourism Takeaways

- Should not take success for granted
- Promotion Matters
- Opportunities exist to shape visitor behavior – will take commitment

JOB - COMMUNITY - ECONOMY



# Team Tourism



# Thank you!

[www.voicesoftourism.com](http://www.voicesoftourism.com)



Monthly emails



# JOBS - COMMUNITY - ECONOMY