

# Travel and Tourism

Navigating the pandemic -- year two

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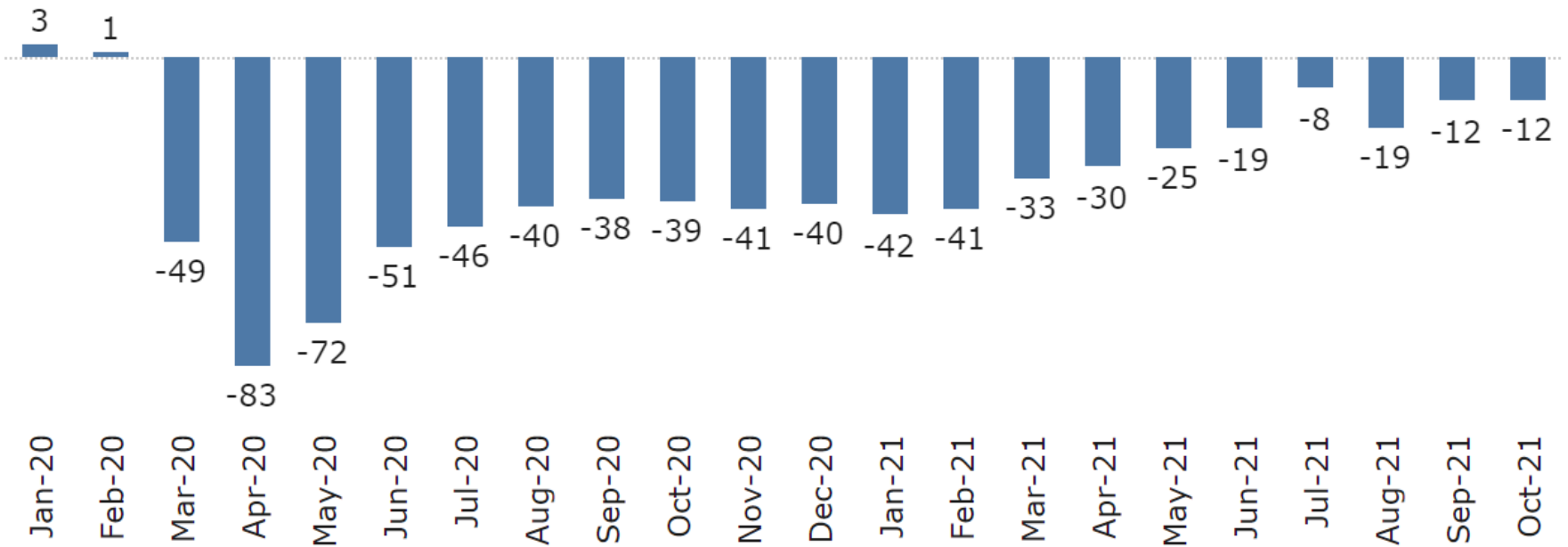
FRANKE COLLEGE OF FORESTRY AND CONSERVATION  
In the aboriginal territories of the Salish and Kalispel people

# U.S. Travel & Hospitality

Travel, tourism, and allied industries have been some of the hardest hit industries in the U.S. and worldwide

# U.S. Travel & Hospitality Current Insights

Travel Spending (% change vs. 2019)  
United States



# U.S. Travel & Hospitality Current Insights

	Nov-20	Dec-20	Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-21	Jul-21	Aug-21	Sep-21	Oct-21
Auto Trips (Arrivalist)	-27%	-23%	-18%	-21%	-16%	-3%	-2%	-8%	2%	-16%	1%	3%
Air Passengers (TSA)	-62%	-62%	-60%	-57%	-48%	-41%	-33%	-26%	-20%	-23%	-24%	-21%
Overseas Arrivals (NTTO)	-90%	-88%	-87%	-91%	-87%	-87%	-81%	-77%	-78%	-76%	-79%	-78%
Hotel Demand (STR)	-36%	-34%	-29%	-27%	-20%	-15%	-13%	-9%	-4%	-10%	-7%	-7%
Short-term Rental Demand (AIRDNA)	-17%	-26%	-17%	-8%	-7%	0%	8%	7%	3%	-2%	4%	12%

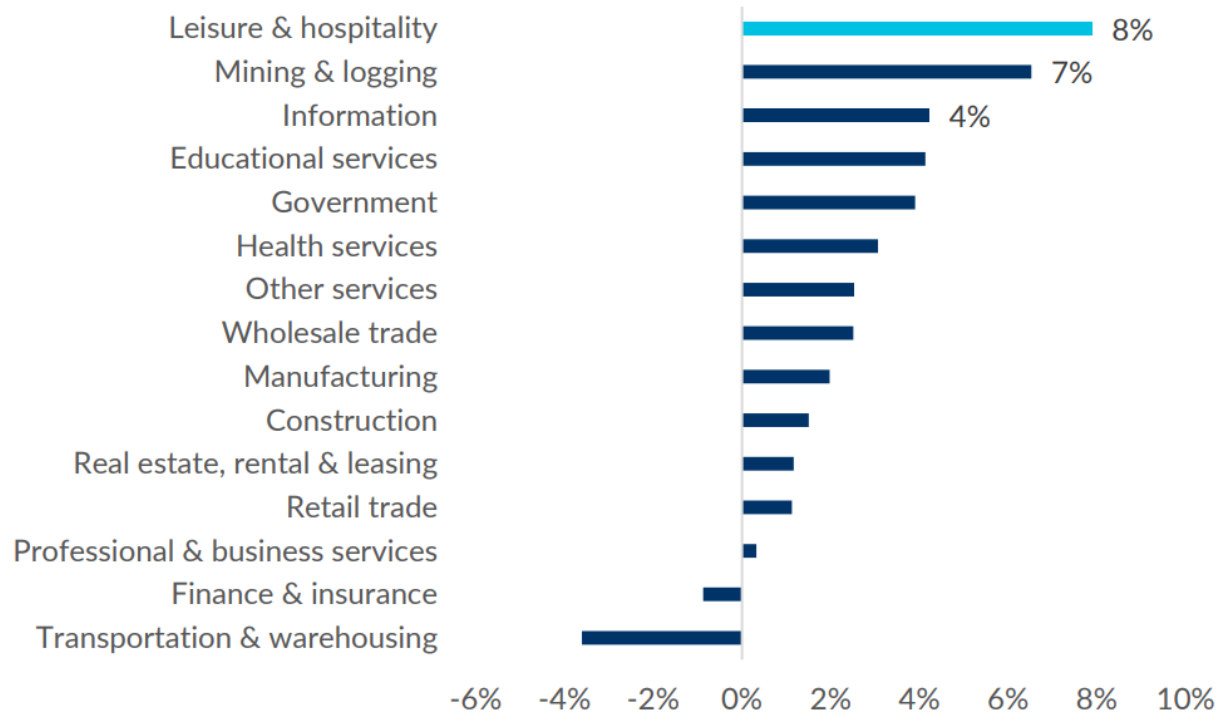
Auto trips and Short Term Rentals outperforming the other travel indicators.

# U.S. Travel & Hospitality Work Force

## Share of jobs lost in major industries

% of industry jobs still lost from Feb. 2020-Nov. 2021

As of November,  
2021, L&H jobs  
remain 8% below  
February 2020  
levels

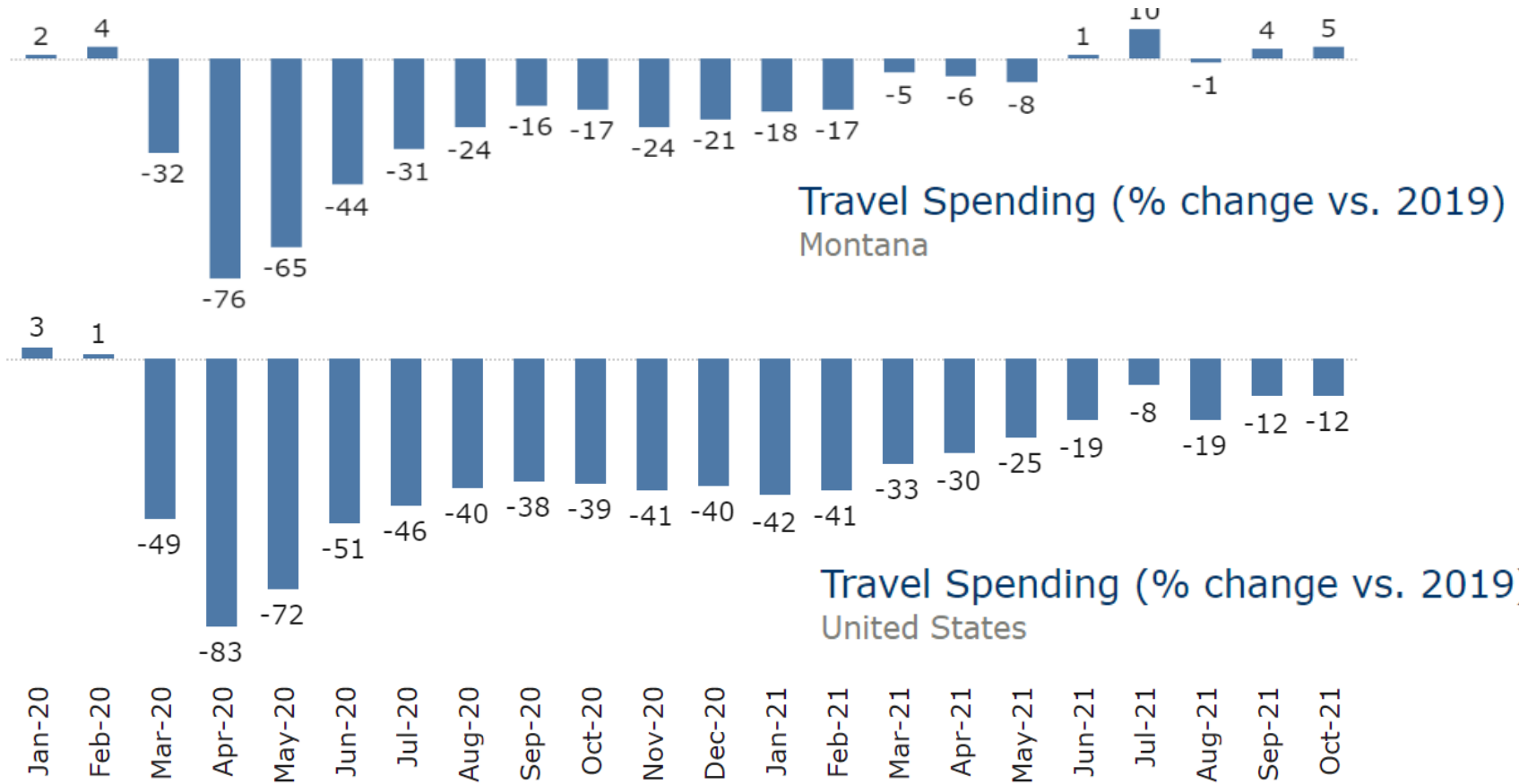


Source: U.S. Travel Association and Tourism Economics; BLS

# Montana Travel

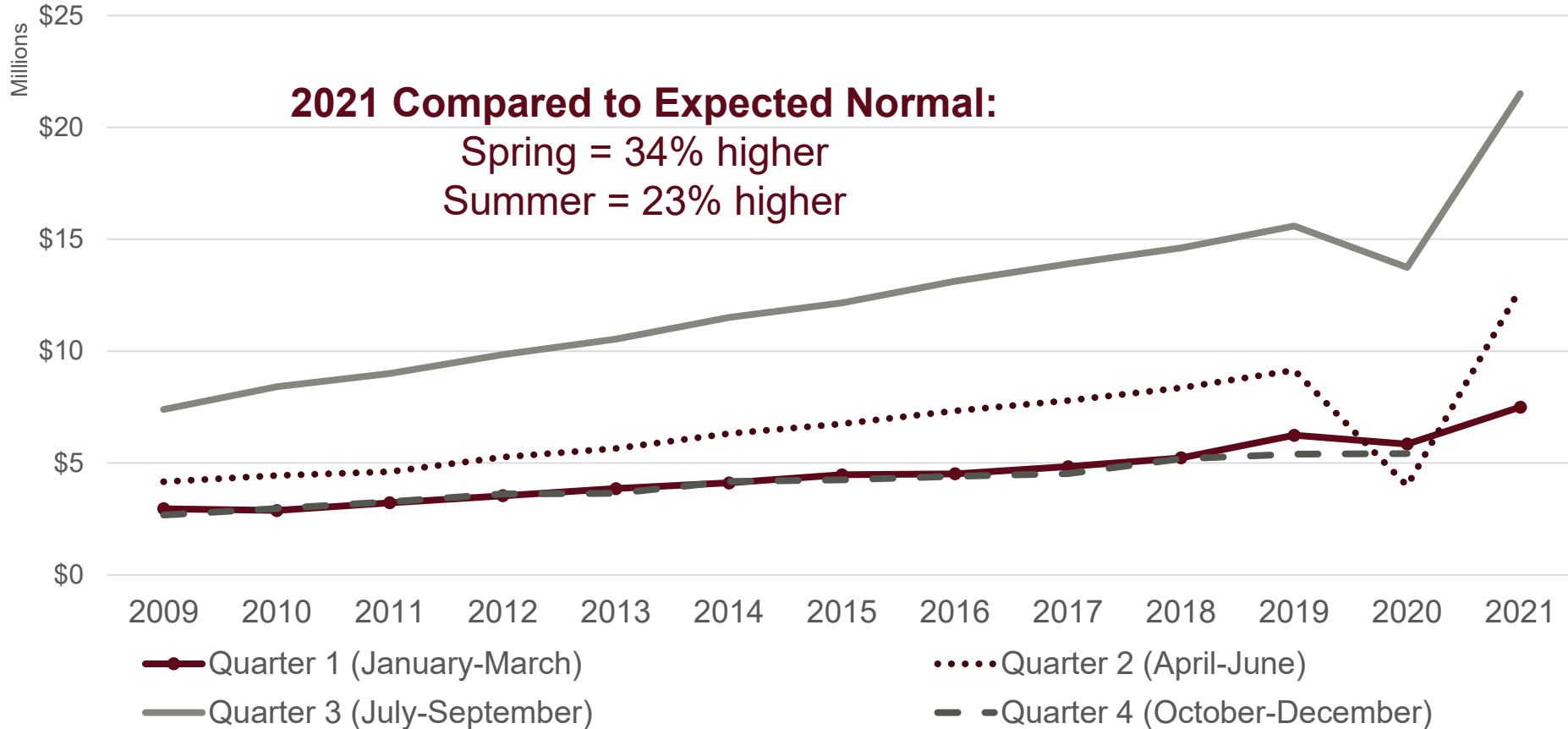
Following national trends?  
Or finding its own way?

# Montana Travel



Source: U.S. Travel Association and Tourism Economics

# Lodging Facility Use Tax Collection (Bed Tax)

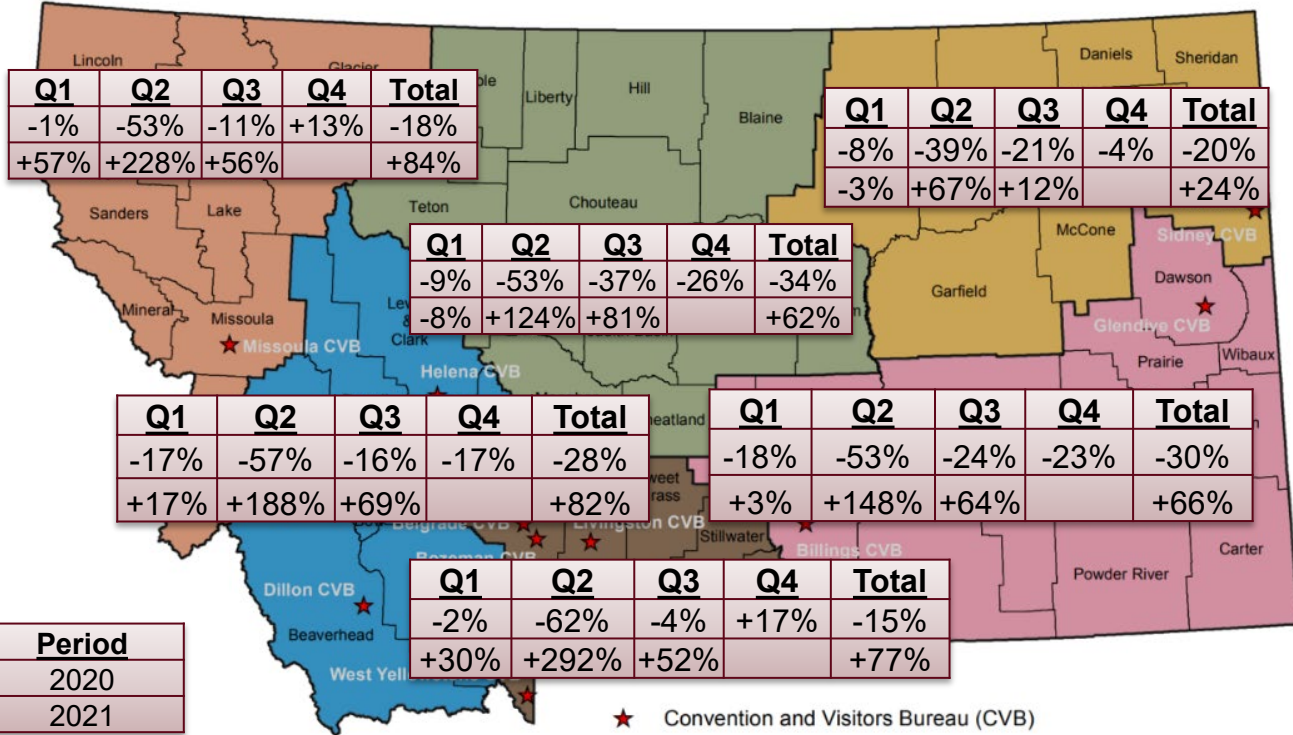


Source: Montana Department of Commerce



# Lodging Facility Use Tax Collection

## Quarterly Changes 2020 & 2021



**Occupancy: 21/19**

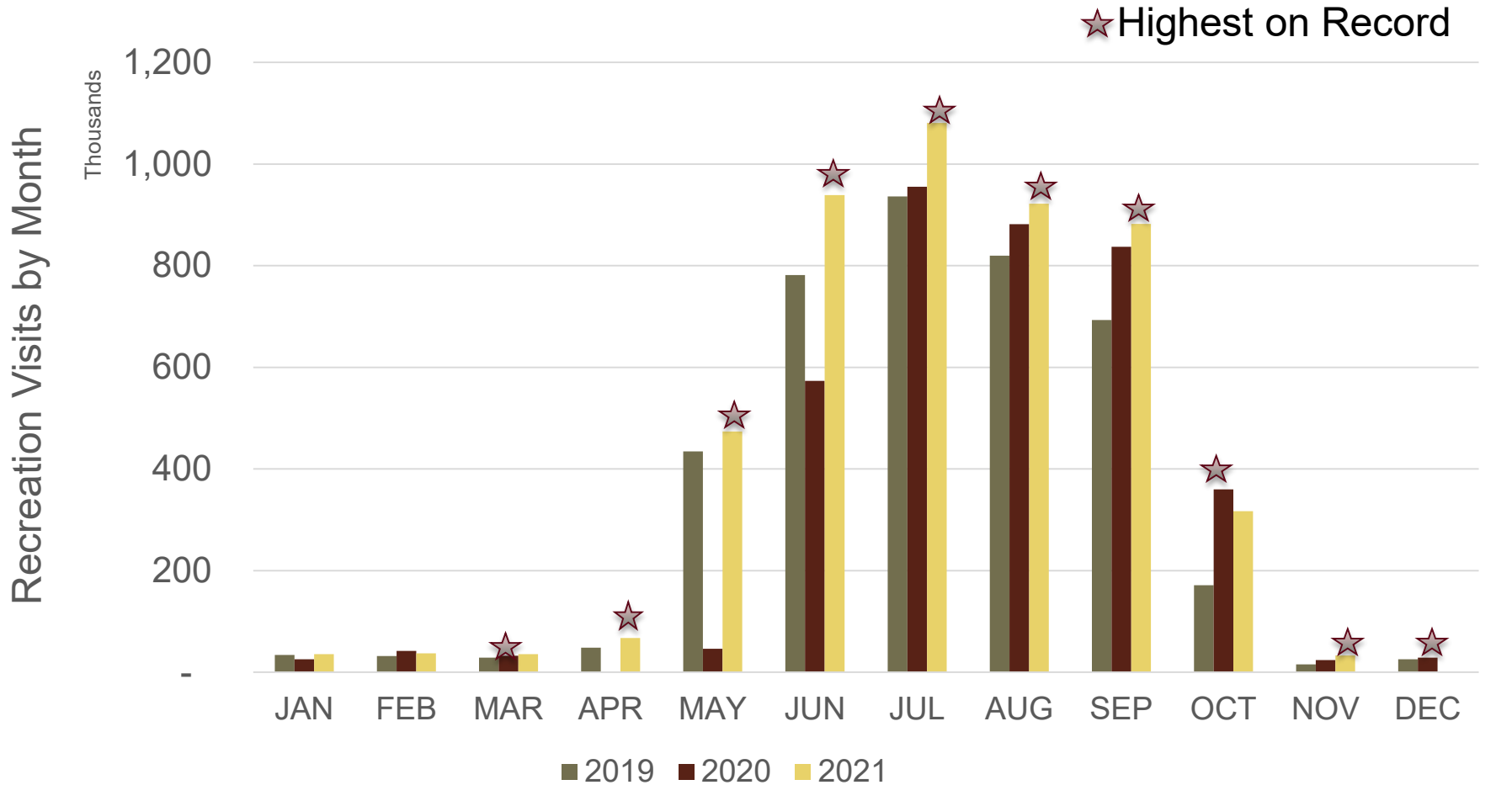
- 82%/79% - July
- 79%/75% - June

**ADR: 21/19**

- \$180/\$138 – July
- \$152/\$125 – June

Source: Montana Department of Commerce

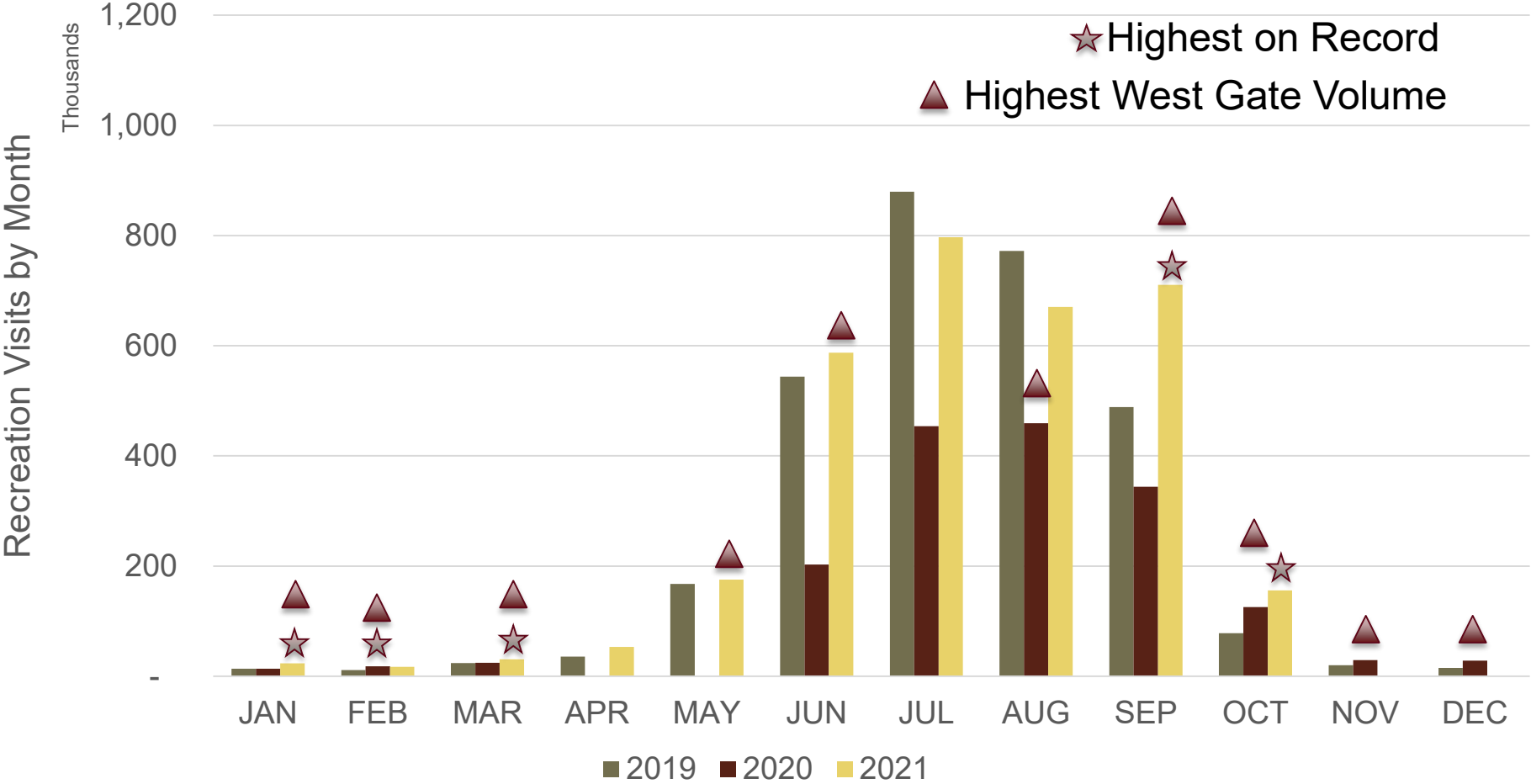
# Yellowstone Recreation Visits



**2021 has set annual visitation record**

Source: National Park Service

# Glacier Recreation Visits



Source: National Park Service

**2021 may set annual visitation record**

# Montana Perceptions on Labor in Tourism & Recreation

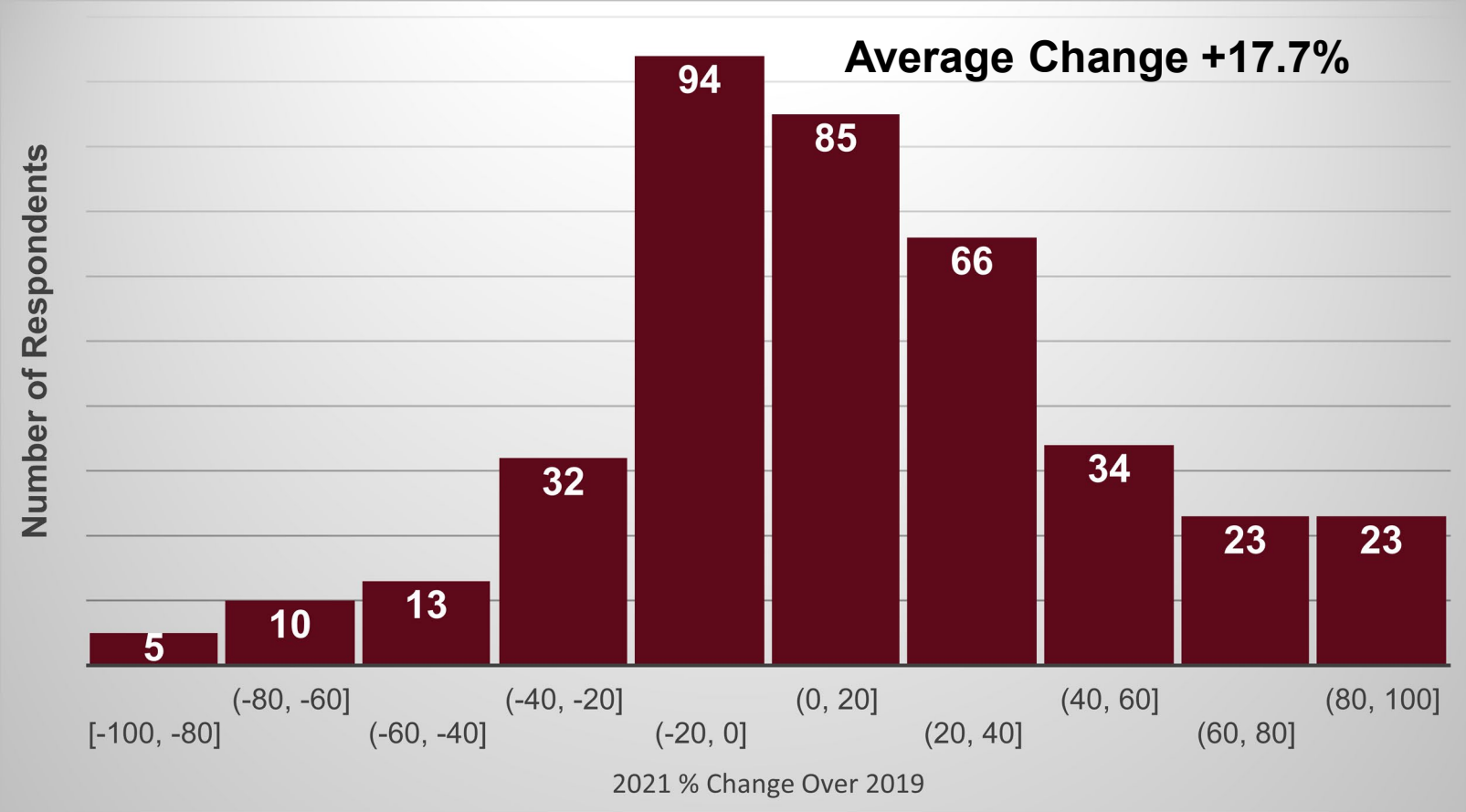
- Surveyed more than 400 business owners, managers, and partners in travel and tourism throughout Montana.



Employees	Respondents
1 to 4	210
5 to 9	62
10 to 19	61
20 to 49	37
50 to 99	26
More than 99	21

Source: Institute for Tourism and Recreation Research

# Montana Tourism & Recreation - Labor



**Question:** How did your 2021 customer volume compare to 2019

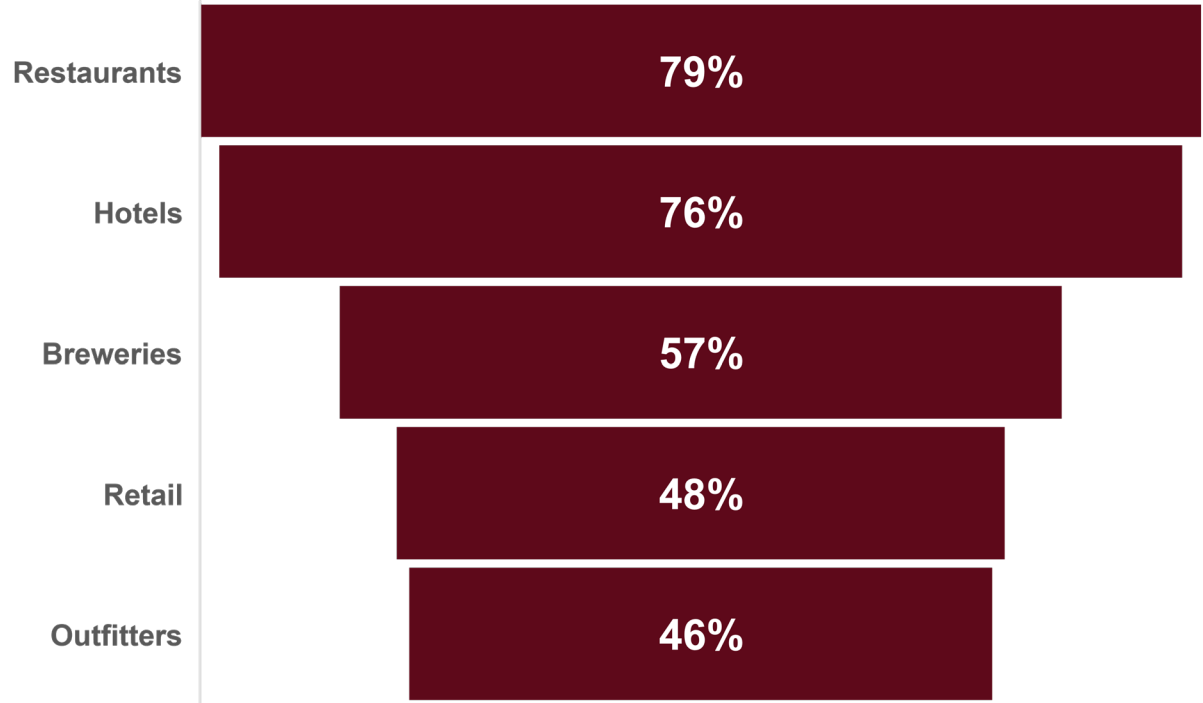
Source: Institute for Tourism and Recreation Research

**Average Sales Change +20.7%**

# Montana Tourism & Recreation - Labor

**Question:** Would you consider your business/agency to be currently understaffed?

Percent affirming they are understaffed



Positions most likely to be understaffed:

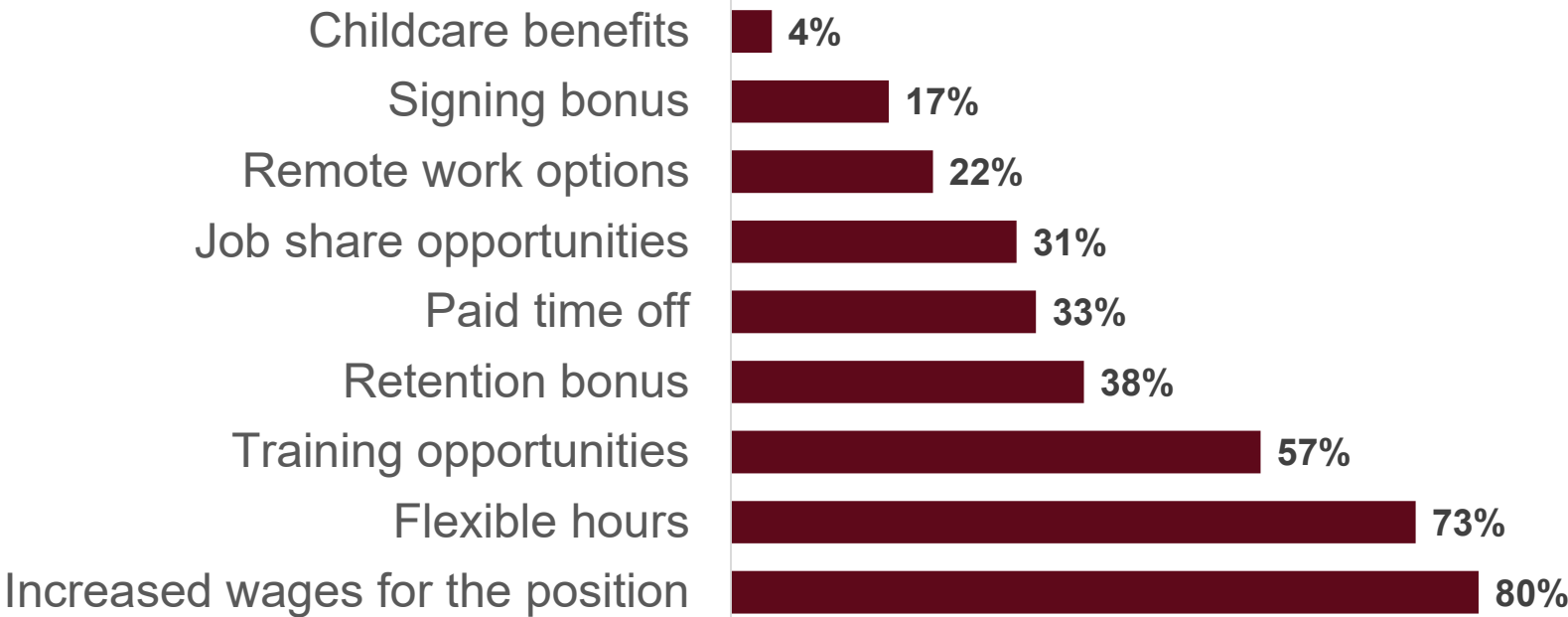
- Customer/Public Facing (Waitstaff, front desk, guides)
- Back of house (cooks, support staff, maintenance)

Source: Institute for Tourism and Recreation Research

# Montana Tourism & Recreation - Labor

**Question:** As a result of being understaffed, what actions have been taken at your business/agency to entice potential applicants?

Percent affirming they have instituted the practice

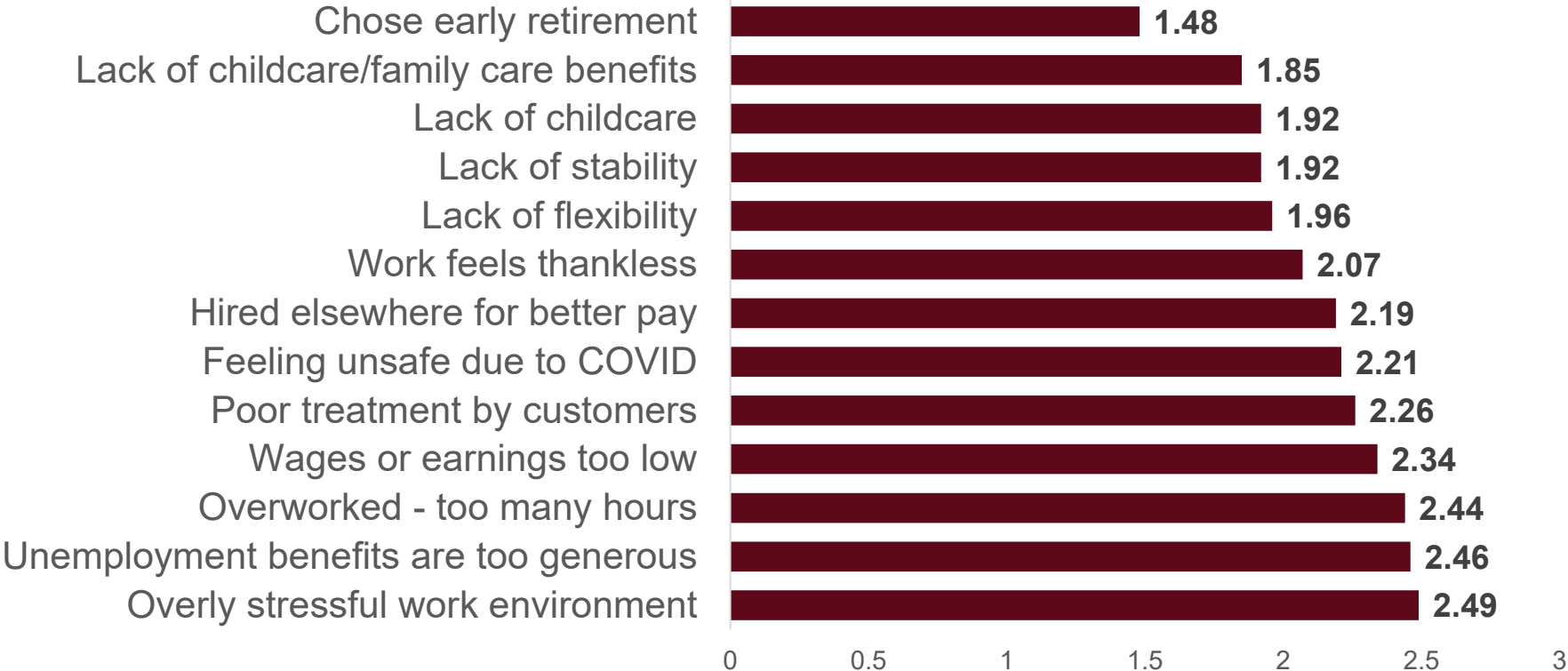


Source: Institute for Tourism and Recreation Research

# Montana Tourism & Recreation - Labor

**Question:** In your opinion, please rate how important the following attributes are to former employees who chose leave (or not return after furlough/layoff) your business

Rated on a scale of Not at all important (1) to Extremely Important (5)



Source: Institute for Tourism and Recreation Research



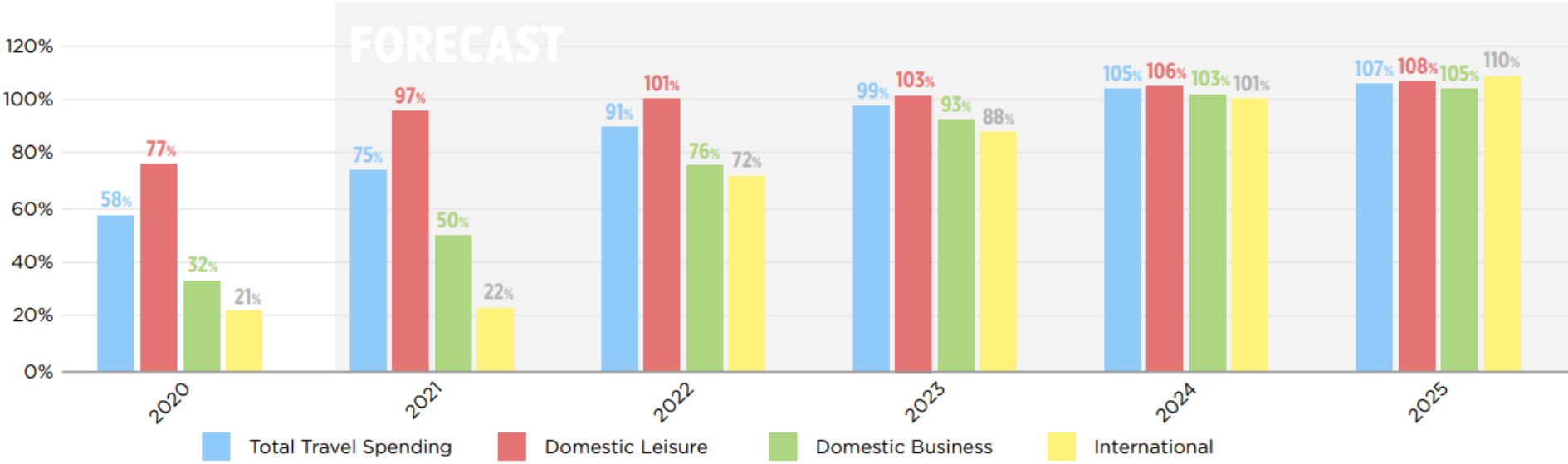
# Montana Tourism & Recreation - Labor

**Question:** Since the start of the pandemic, have you left (or do you have coworkers that have left) the service and hospitality industry? If so, why?

*“Honestly, COVID just made the decision to leave the service industry ‘valid’ and socially acceptable. Service industry workers left because not only were they being treated as sub-human, paid little nothing, given no support, pushed to their limits, but there was also a pandemic exacerbating the situation workers were already in. The last straw was COVID and the complete disregard for workers health and the belittling by corporations of any concerns workers had for their own wellbeing. The idea of leaving has always been in their mind, but COVID made it easier/gives a real reason to leave a soul crushing job.”*

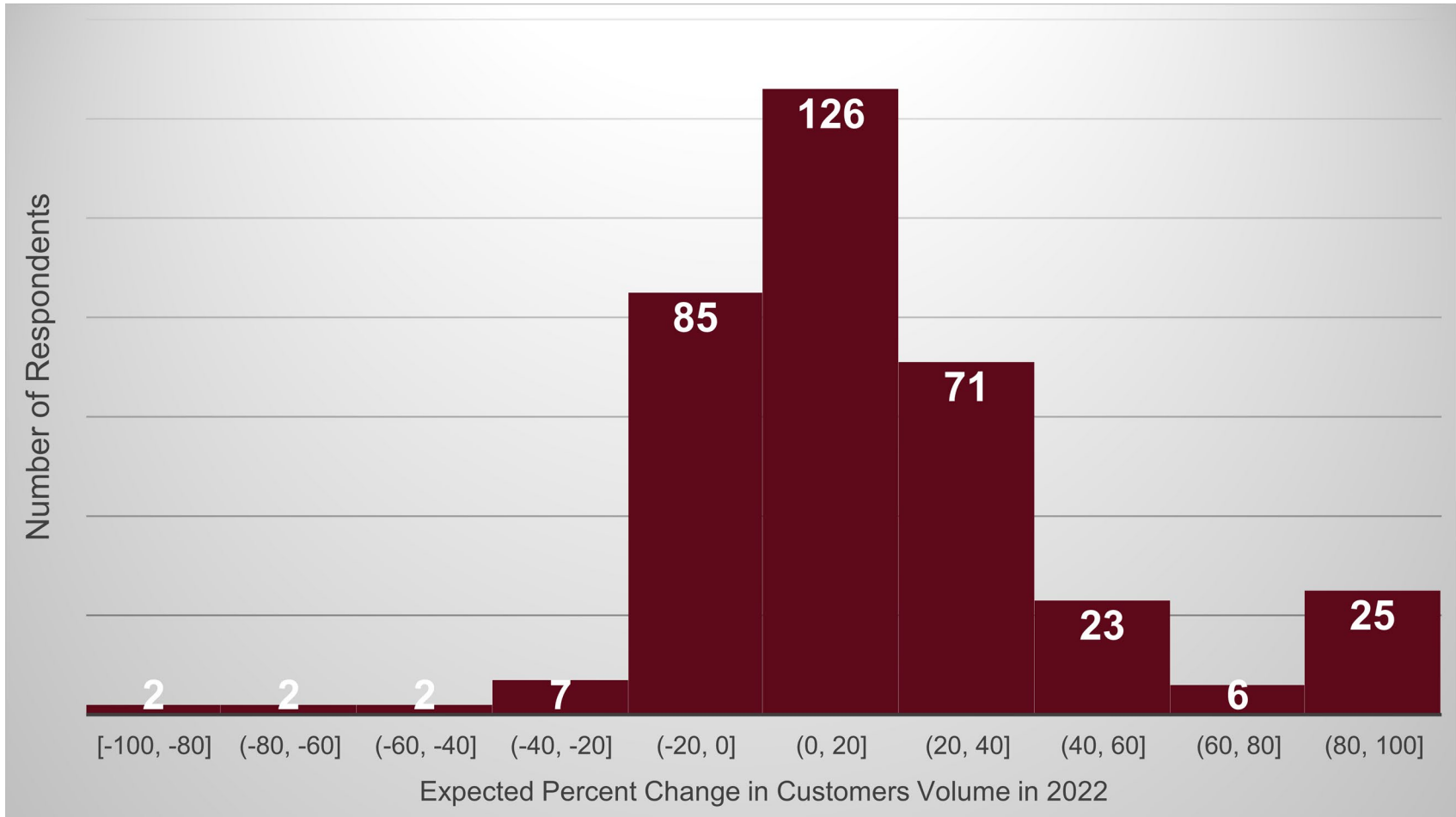
Source: UM Student Project: Parks Tourism & Recreation Management - Mikala Itrich, Philip Buttschardt, William Thomas, Victoria Bloomgren, Rebekah Ficek

# Moving Forward



Source: US Travel Association

# Montana Tourism & Recreation – 2022 Outlook



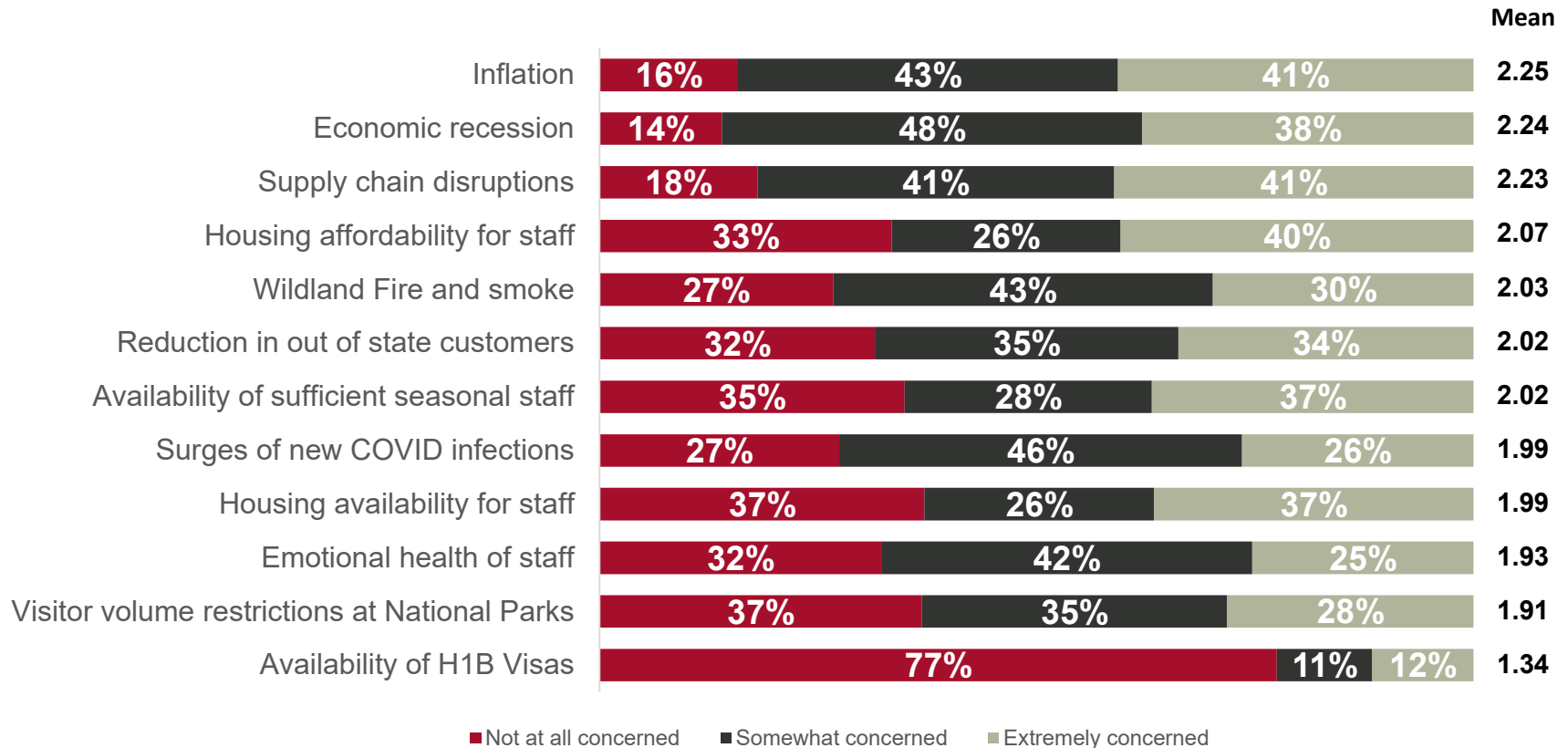
**Question:** How do you expect your 2022 customer volume to compare to 2021

Source: Institute for Tourism and Recreation Research

# Montana Tourism & Recreation – 2022 Outlook

**Question:** Looking to 2022, how concerned are you about the following, as they may impact your business/agency:

(1) Not at all concerned, (2) Somewhat Concerned, (3) Extremely Concerned



Source: Institute for Tourism and Recreation Research

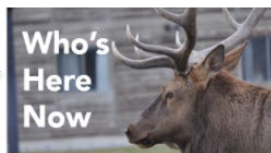
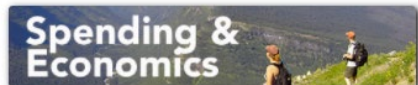
# Thank You

For all information from the Institute for Tourism and Recreation Research, please see:

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Get Started with our NEW Tableau-based Interactive Data by selecting a button or link below.



\*Coming Soon\*



\*Coming Soon\*



Our full interactive data report with drop down filters replicating the feel of our Legacy report



Our full interactive data on a lighter dashboard with interactive filtering

ITRR produces annual estimates of total travel-related spending by nonresidents in Montana. These estimates are used to evaluate the total contribution of nonresident travel spending to Montana's economy. To view these estimates, click on a year in the list below. Historical estimates can be found by searching ITRR's publications in ScholarWorks.

[2020 Nonresident Visitation, Expenditures & Economic Impact Estimates](#)

[2019 Economic Contribution of Nonresident Travel Spending in Montana Travel Regions and Counties](#)