

Travel and Tourism

Navigating a pandemic and the
desires for open spaces

JEREMY L. SAGE, Ph.D.

ECONOMIST & INTERIM DIRECTOR
INSTITUTE FOR TOURISM AND RECREATION RESEARCH

ASSOCIATE RESEARCH PROFESSOR
DEPARTMENT OF GEOGRAPHY

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



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ITRR Director Norma Nickerson Retires



After 25 years at the helm of ITRR, Norma has retired. We all sincerely thank her for the leadership, entertainment, and friendship. We wish her happy trails as she ventures into retirement!



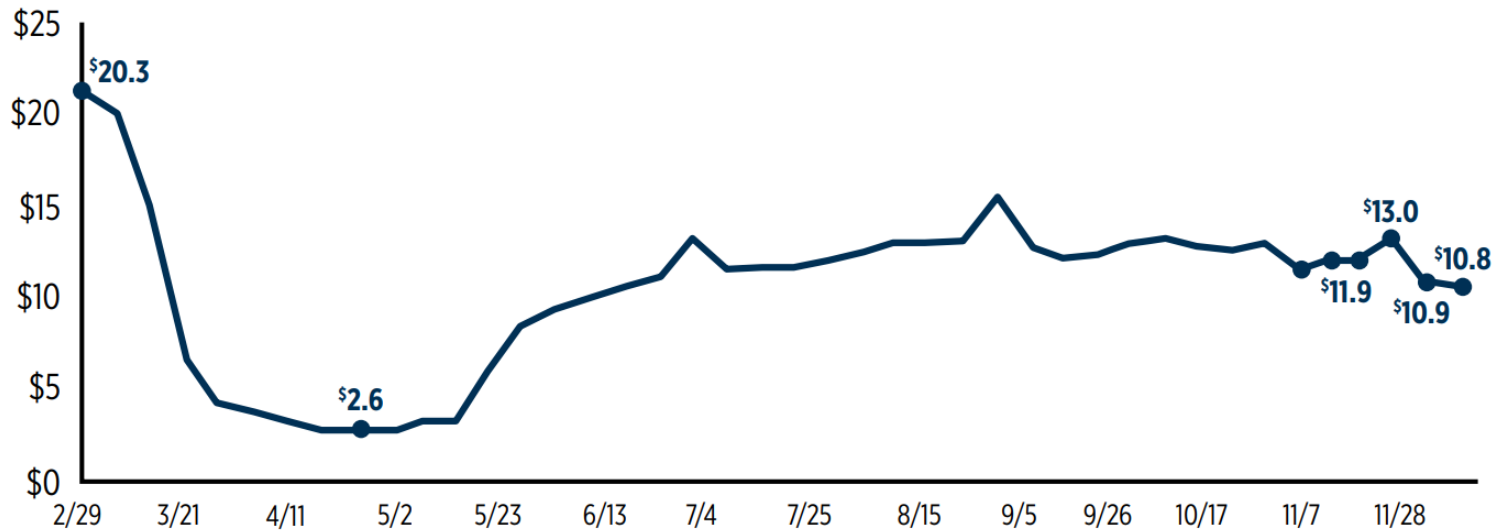
U.S. Travel

Travel and tourism has been one of the hardest hit industries, U.S. and worldwide



National Weekly Travel Spending

(\$ billions)



The U.S. travel economy has lost over \$500 billion in cumulative losses as a result of the COVID-19 pandemic. That equates to losses of \$1.75 billion per day of the pandemic.

Source: U.S. Travel Association and Tourism Economics

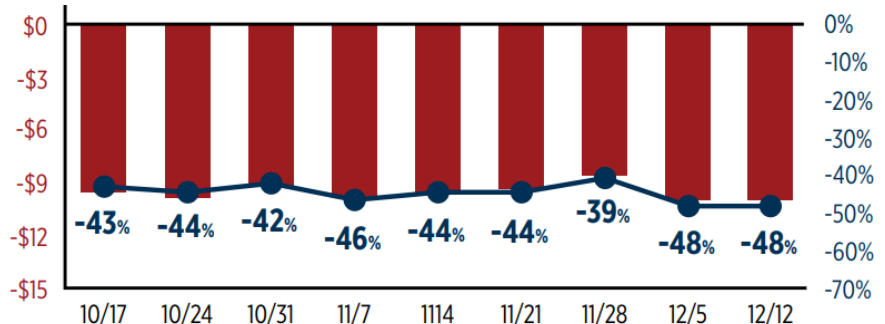
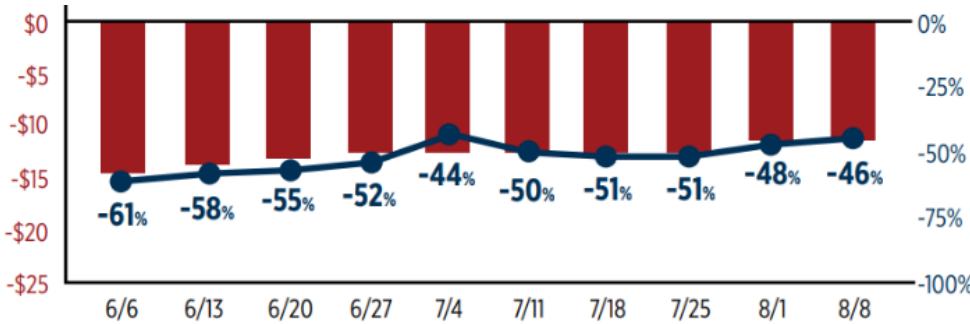
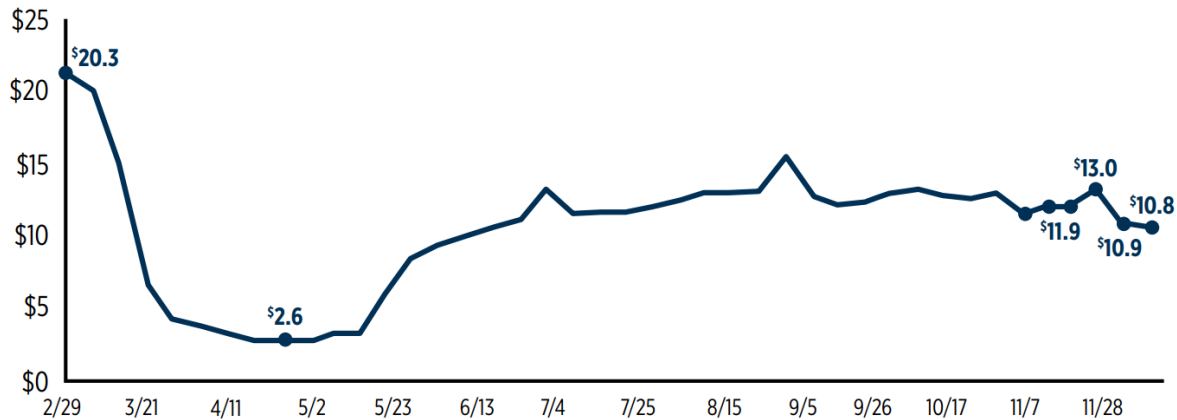


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National Weekly Travel Spending

(\$ billions)



National Weekly Travel Spending

(\$ billions, year-over-year change)

■ Net change
 — % change (right)

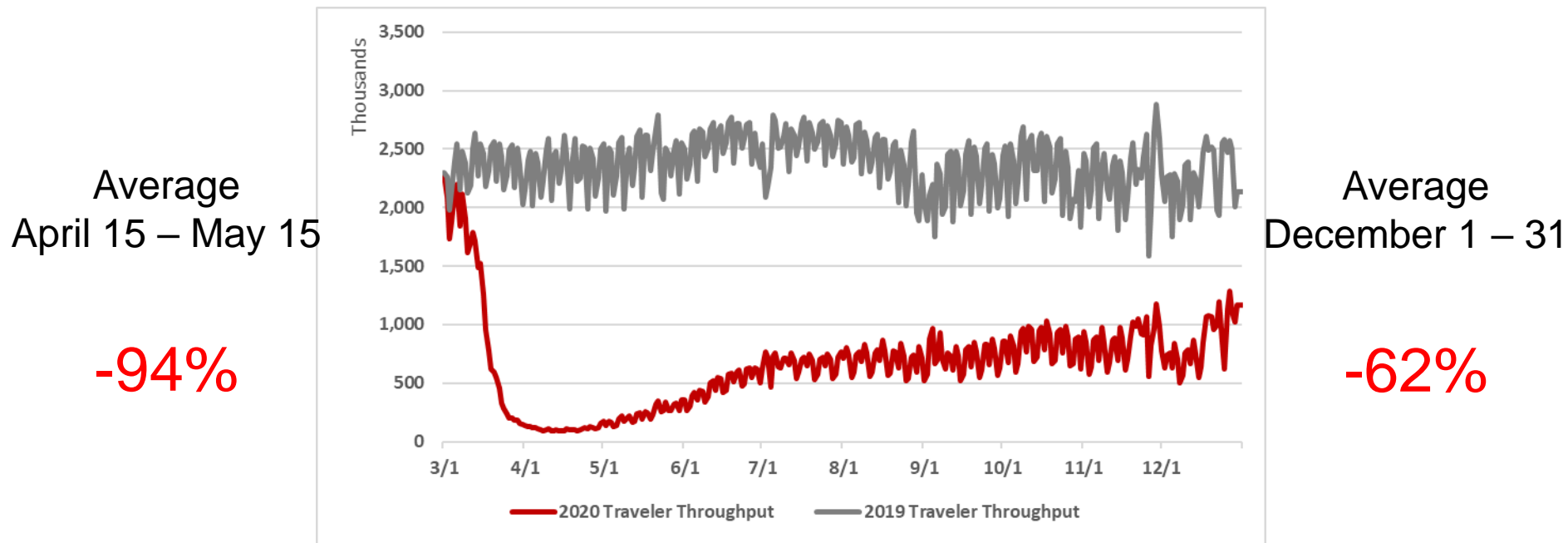
Source: U.S. Travel Association and Tourism Economics



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TSA checkpoint travel numbers (current year versus same day last year)



Source: U.S. Travel Association and Tourism Economics



National Anxiety



**NATIONAL
ECONOMY**



**HEALTH OF
FRIENDS & FAMILY**

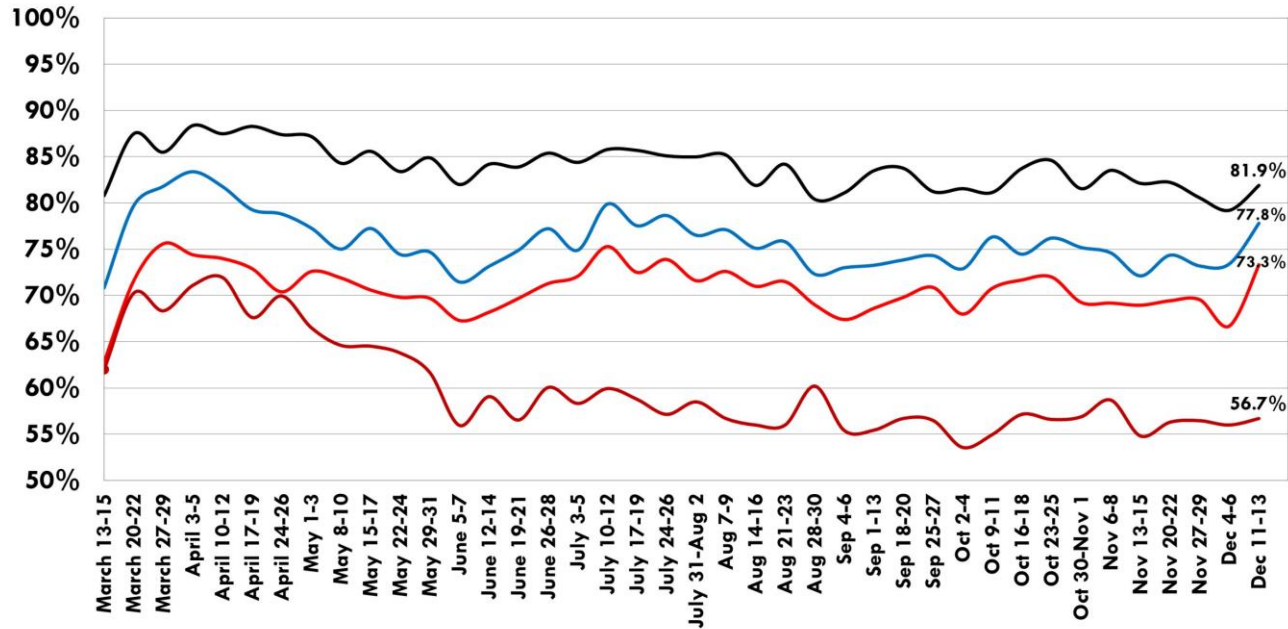


**PERSONAL
HEALTH**



**PERSONAL
FINANCES**

(% ANSWERING 10-6 ON 11-POINT SCALE)



QUESTION: THINKING ABOUT THE CURRENT CORONAVIRUS SITUATION, HOW CONCERNED ARE YOU ABOUT THE IMPACT IT MAY HAVE ON THE/YOUR _____ ?

Source: U.S. Travel Association and Destination Analysts

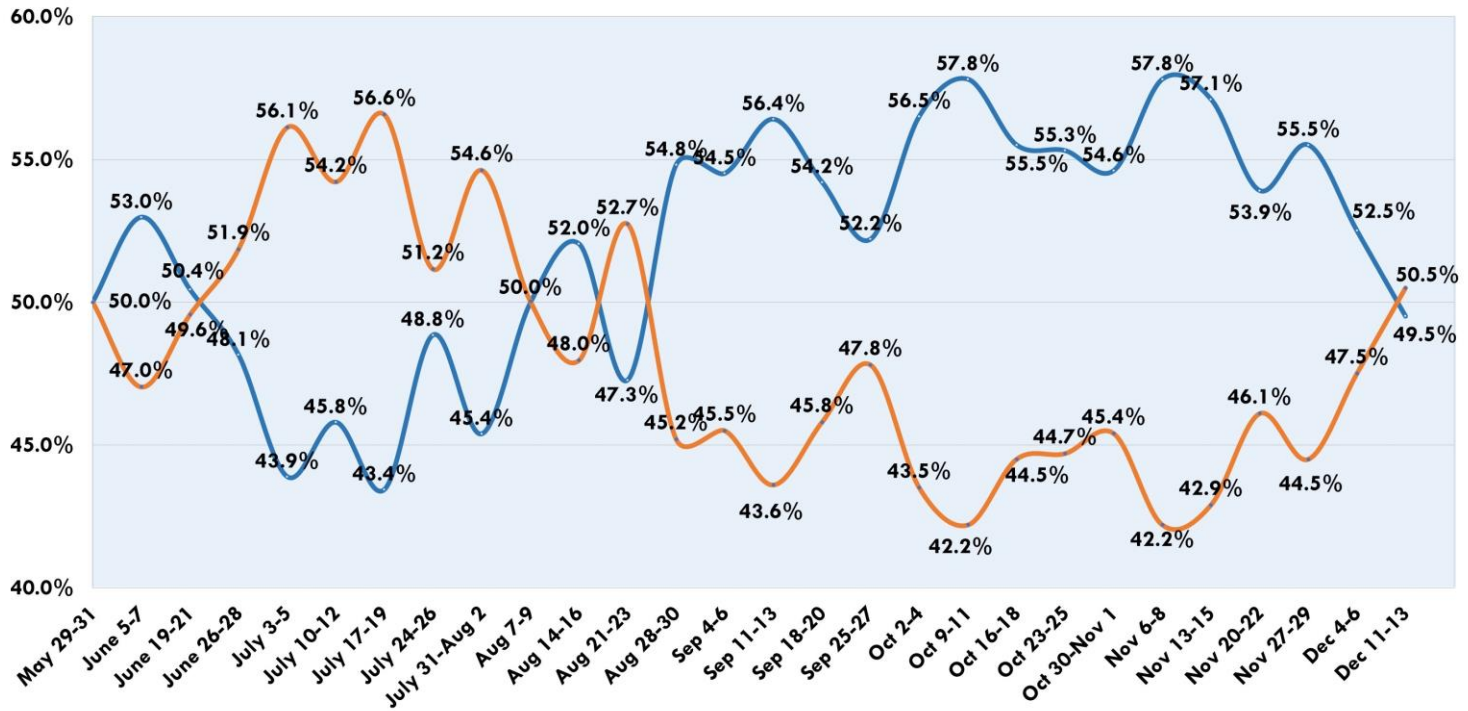
Travel State-of-Mind



READY TO TRAVEL



NOT READY TO TRAVEL



QUESTION: WHEN IT COMES TO GETTING BACK OUT AND TRAVELING AGAIN, WHICH BEST DESCRIBES YOUR CURRENT STATE OF MIND? (SELECT ONE)

Source: U.S. Travel Association and Destination Analysts



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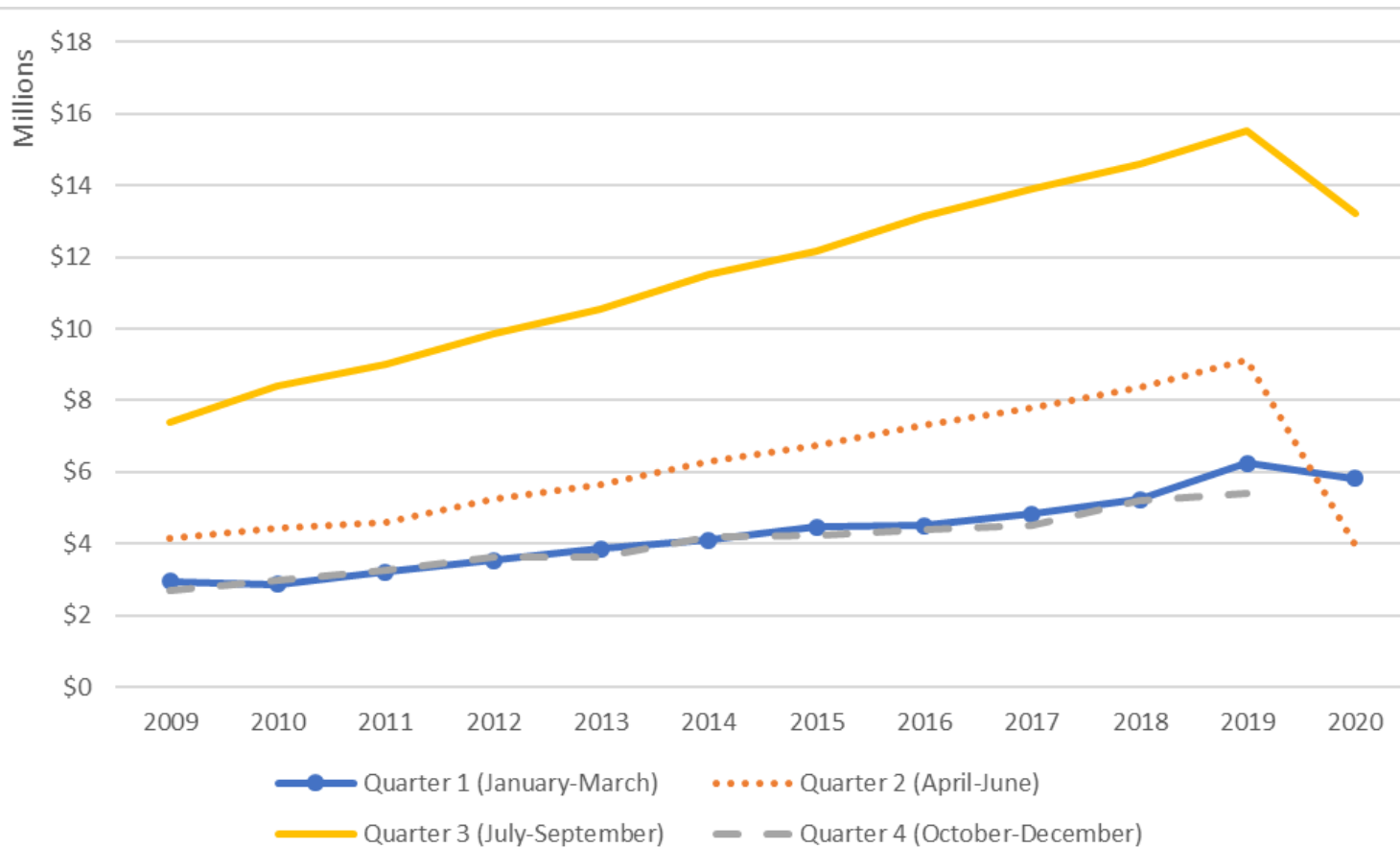
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Montana Travel

Following national trends?
Or finding its own way?



Lodging Facility Use Tax Collection (Bed Tax)



In 2020

Quarter 1:
-7%

Quarter 2:
-57%

Quarter 3:
-14%

Quarter 4:
?

Total:
-25%

Source: Montana Department of Commerce

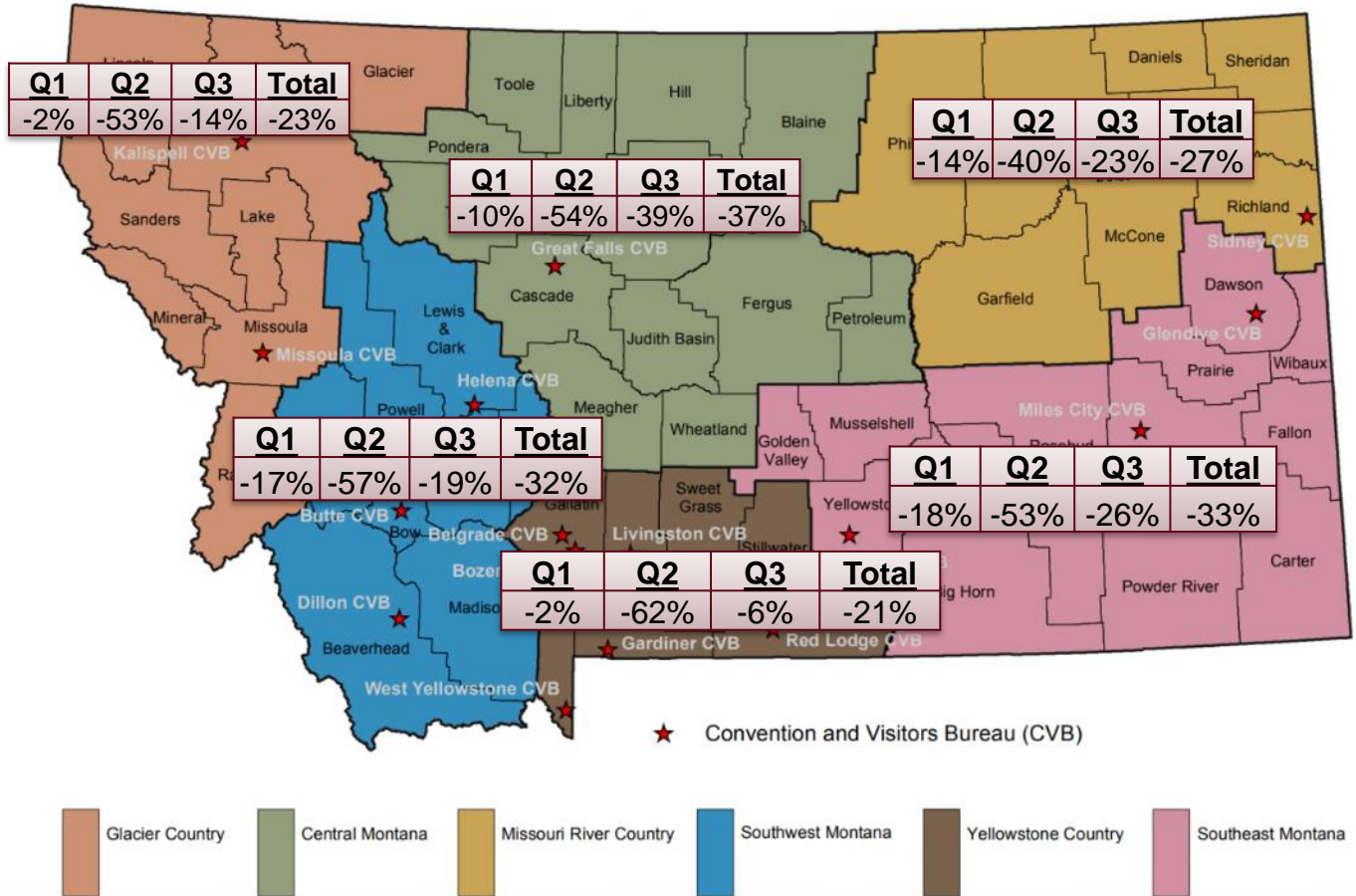


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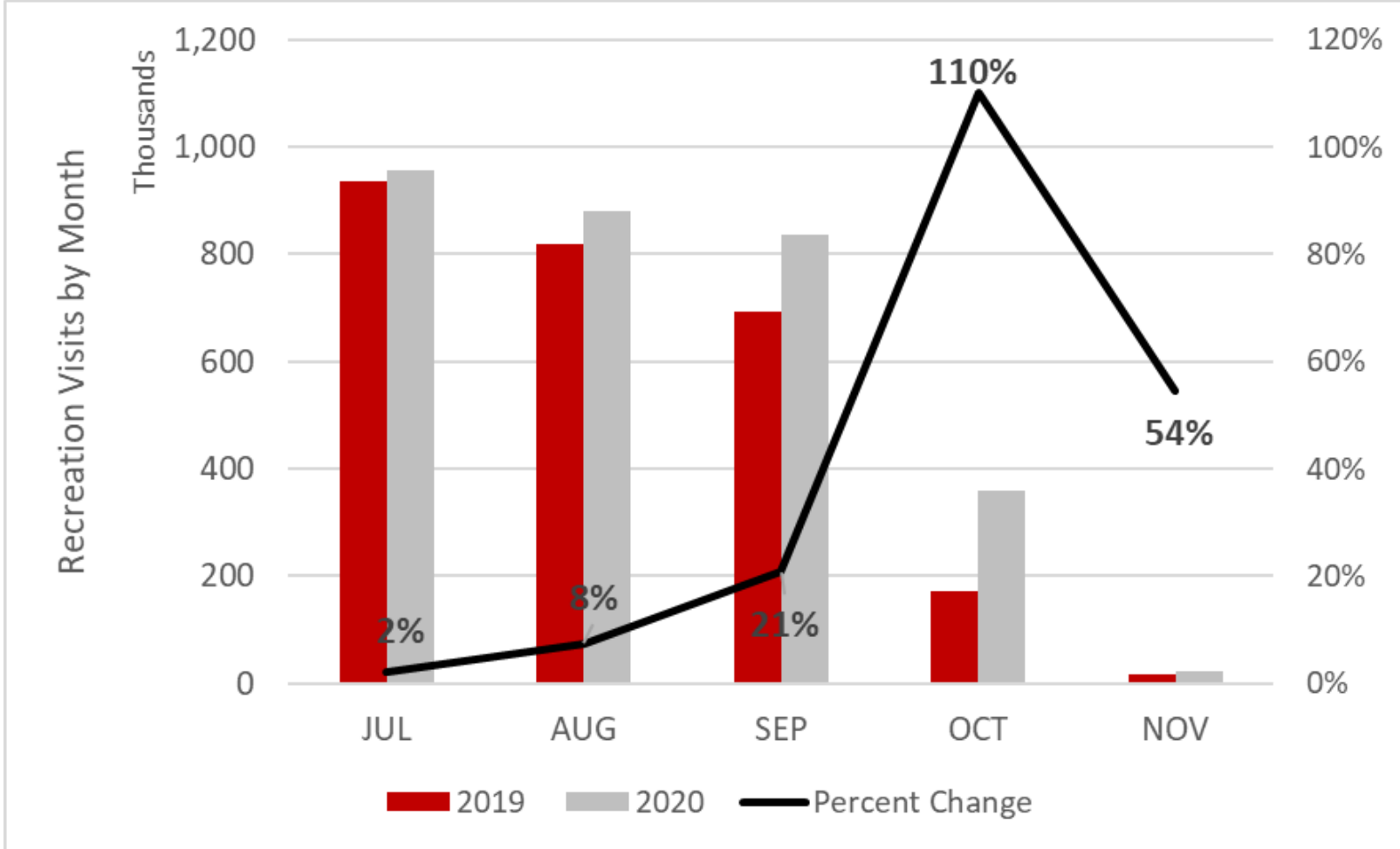
Lodging Facility Use Tax Collection

Quarterly Reduction 2019-2020



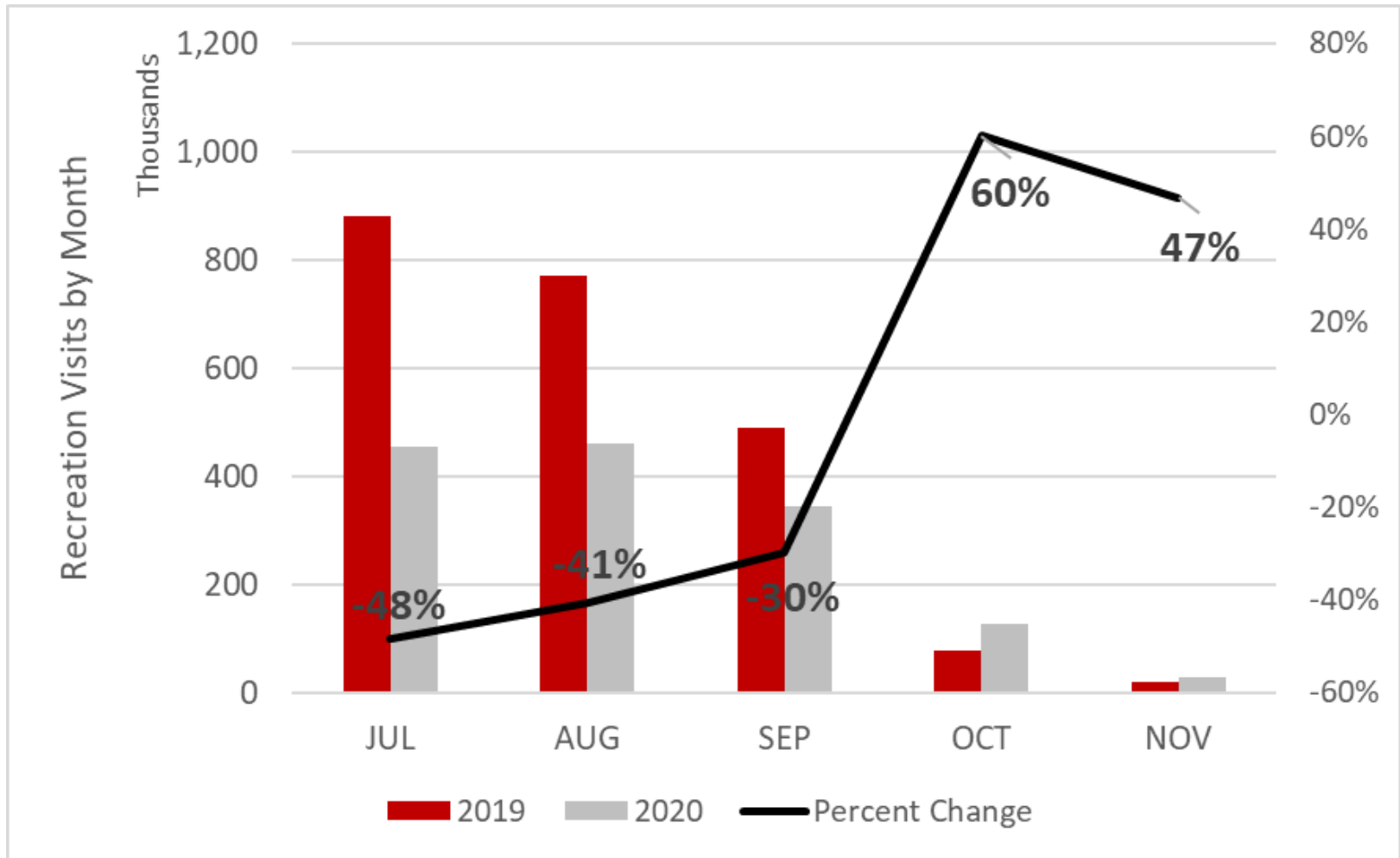
Source: Montana Department of Commerce

Yellowstone Recreation Visits



Source: National Park Service

Glacier Recreation Visits



Source: National Park Service



Montana State Parks

MONTANA STATE PARKS SEE RECORD SETTING VISITATION IN 2020

Top five most visited parks through September 2020:

- 1- Flathead Lake State Park (all units): **+33.5%** YoY
- 2- Cooney Reservoir State Park: **+26%** YoY
- 3- Giant Springs State Park: **-0.2%** YoY
- 4- Lake Elmo State Park **+25.7%** YoY
- 5- Thompson Chain of Lakes State Park **+42.5%** YoY



System wide, Montana's parks hosted 3 million visitors; a 24.4% increase over 2019.

80% of parks saw increases from 2019 to 2020.

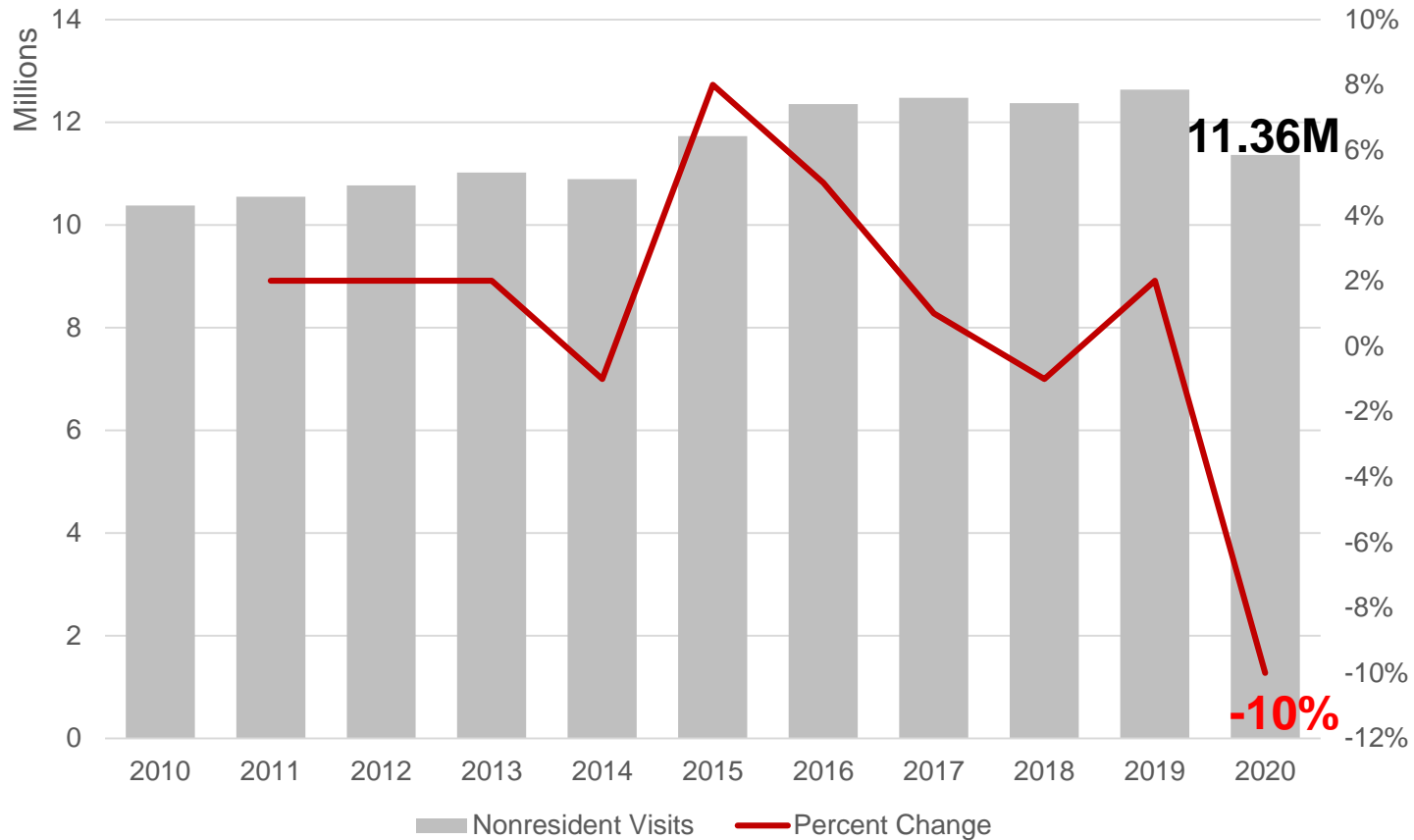
Source: Montana FWP



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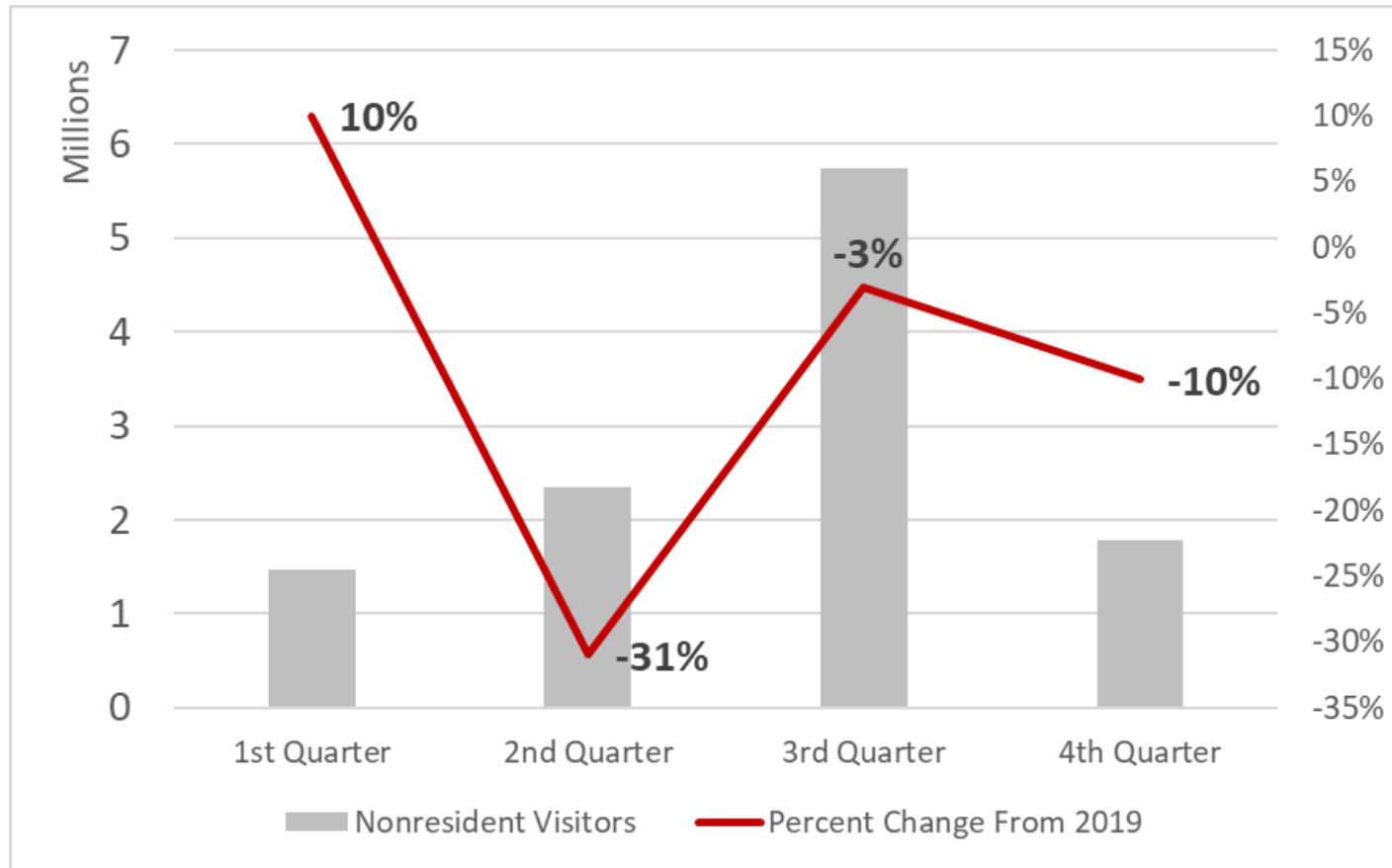
Nonresident Visitors



Source: Institute for Tourism and Recreation Research (Preliminary Data)



Nonresident Visitors 2020 by Quarter



Source: Institute for Tourism and Recreation Research (Preliminary Data)



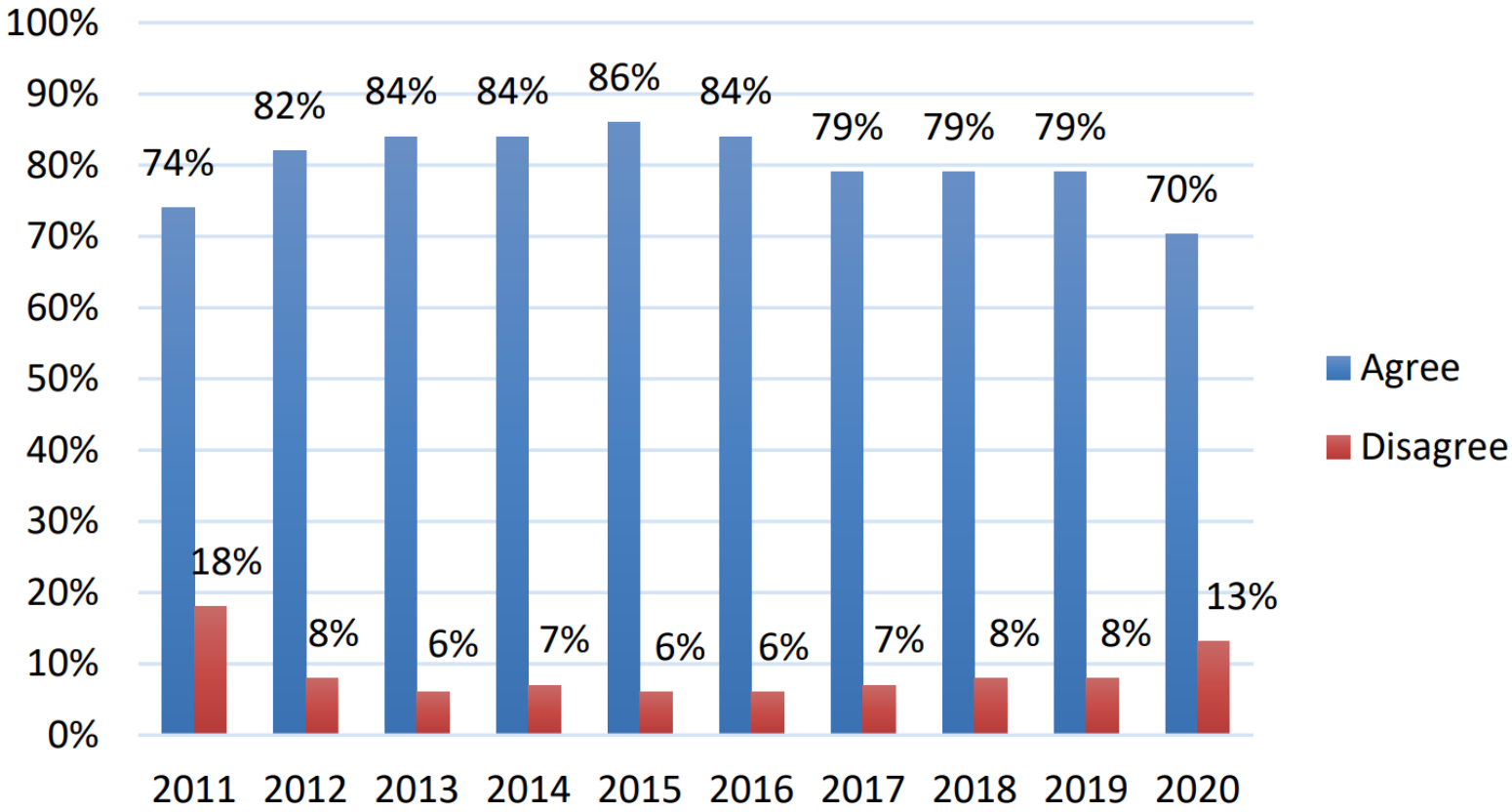
Moving Forward

Expect the draw to open spaces to remain high through 2021

Residents' perception of tourism matters



Resident Attitudes Towards Tourism

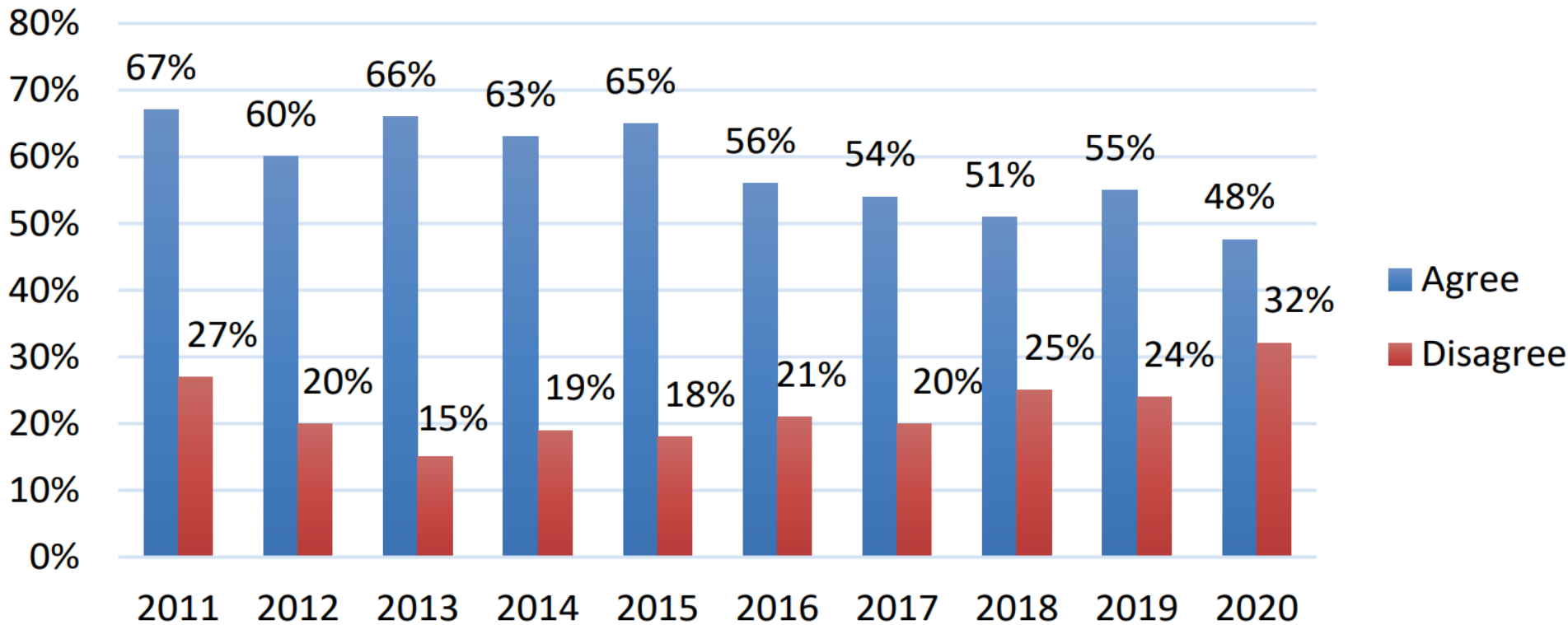


Question: The overall benefits of tourism outweigh the negative impacts
Rated on a scale of Strongly Disagree to Strongly Agree

Source: Institute for Tourism and Recreation Research



Resident Attitudes Towards Tourism



Question: If tourism increases in Montana, the overall quality of life for resident will improve

Rated on a scale of Strongly Disagree to Strongly Agree

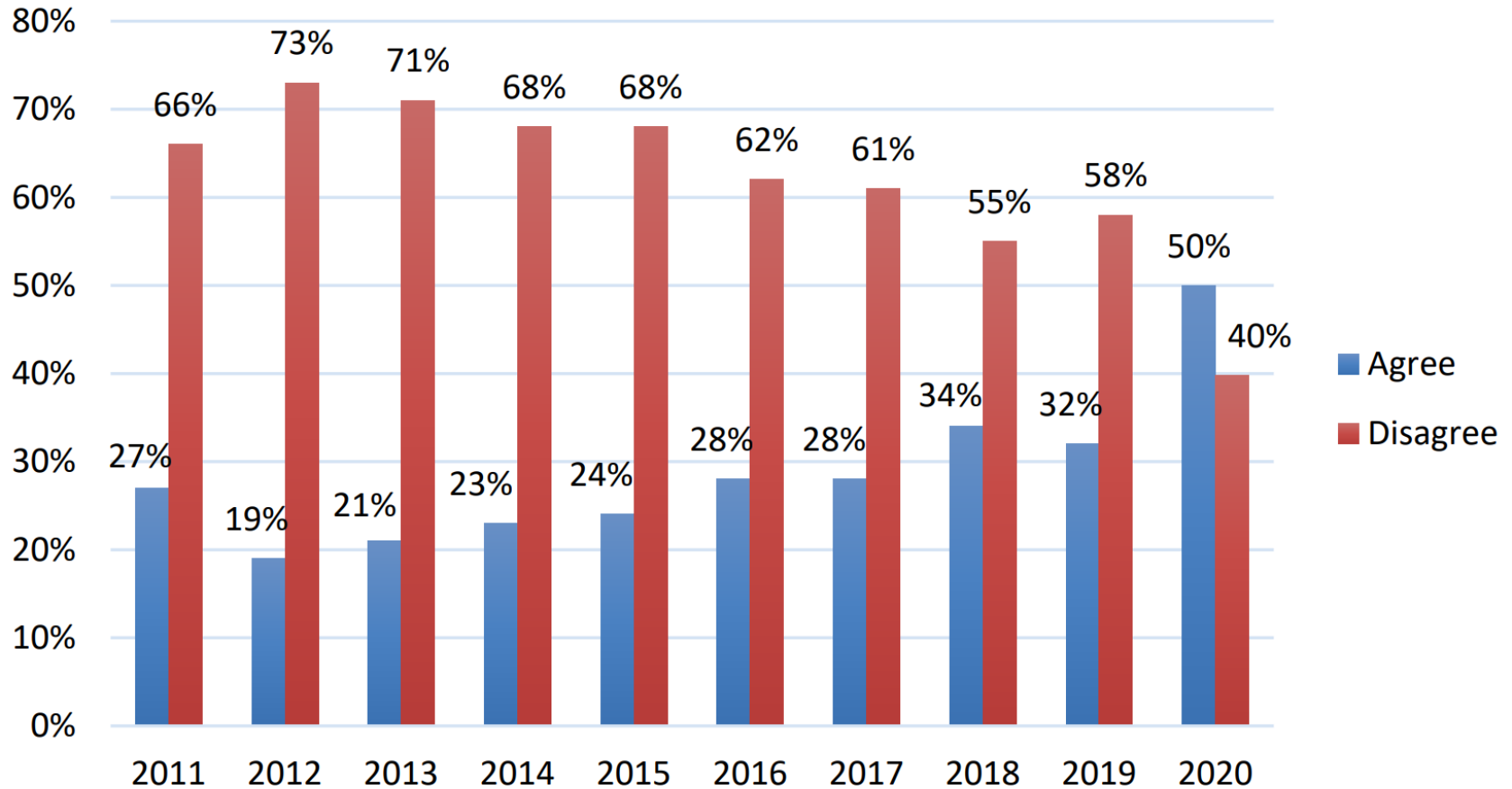
Source: Institute for Tourism and Recreation Research



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Resident Attitudes Towards Tourism



Question: In recent years, the state is becoming overcrowded because of more tourists
Rated on a scale of Strongly Disagree to Strongly Agree

Source: Institute for Tourism and Recreation Research



Moving Forward

Pulling out of the COVID-19 Pandemic



The COVID-19 Vaccine & Travel

49.5%

Agree they won't travel until there is a vaccine available

Of parents with children under 18 will vaccinate them

45.2%

49.6%

Are willing to take the COVID vaccines recently developed



62.4%

believes the recently developed COVID-19 vaccines are safe



58.9%

Feel the recently developed COVID-19 vaccines make them more optimistic about life returning to normal in the next 6 months

Feel the recently developed COVID-19 vaccines make them more optimistic about being able to travel safely in the next 6 months

51.0%

Source: U.S. Travel Association and Destination Analysts



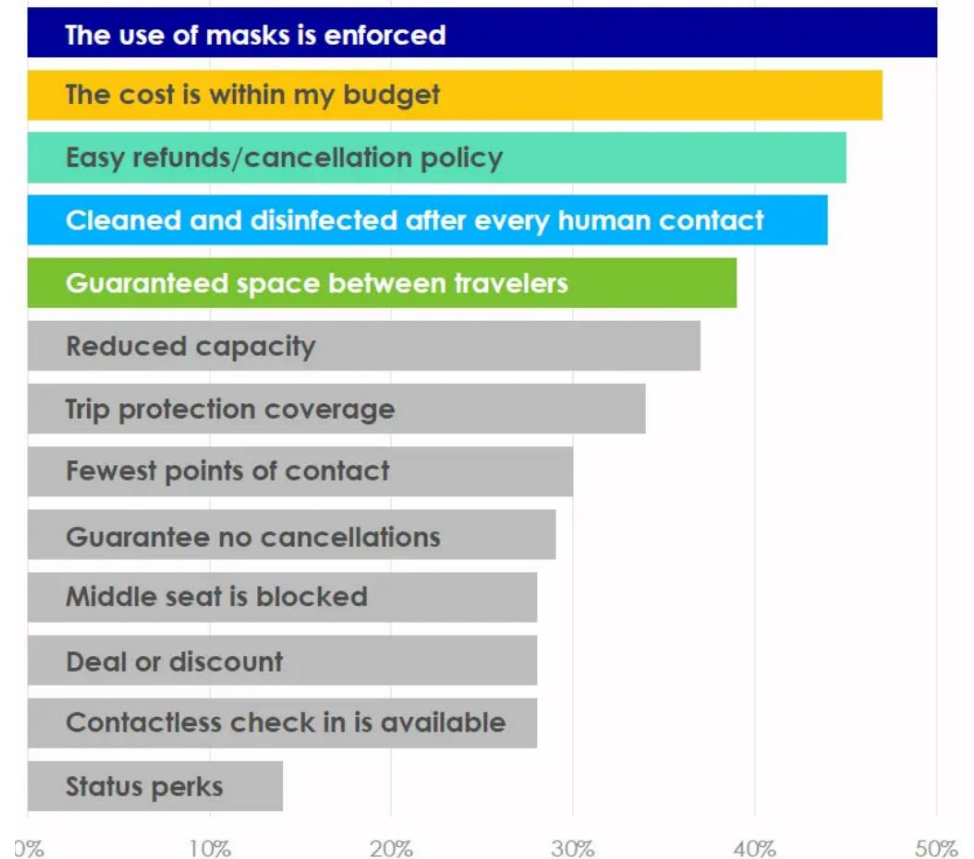
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Globally, travelers are eager to travel....safely

Future travel is highly influenced by mask enforcement for travelers globally, followed by costs, refund policies and hygiene practices.

Question: Which of the following play a role in the decision on how you will get to your destination for future travel?



Source: U.S. Travel Association and Expedia Group



Thank You

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

itrr.umt.edu

jeremy.sage@umontana.edu



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