2019 Travel & Recreation Trends and Outlook

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MT Travel and Recreation
Overall growth in visitor numbers

Nonresident Visitors to Montana

Millions

Annual % Change

Nonresident Visitors

Annual % Change

Overall growth in visitor numbers.
Montana ranks second in visitor spending per capita in Western states

$4,188

$2,430

$2,824

$2,621

$5,523

$3,839

$3,219

$2,751

$3,370
Travelers spend money in all corners of the state.

2018 Nonresident Preliminary:
$3.7 billion in spending. $5.2 billion in full economic. Supported 58,800 jobs. $1.7 billion in associated labor income.
2018 Summer Visitors – local & state visitors

**BIG SKY**

If night spent in Big Sky:*  
6.26 nights in Montana  
Group size = 3.10  
Top three residences  
29% California  
12% Florida  
9% Pennsylvania  
37% flew into Montana  
19% hired an outfitter

*small sample size

**STATE**

5.16 nights in Montana  
Group size = 2.41  
Top three residences  
11% Washington  
7% Idaho  
6% California  
11% flew into Montana  
7% hired an outfitter

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Local Entrepreneurs - Outfitting & Guiding

$76.7 million in revenue for fishing outfitters

$55.3 million in revenue for hunting outfitters

$51 million in revenue for rafting/ floating/ canoeing/kayaking outfitters
Local Impact of trails on communities

**Helena:** $4.3 million in output from nonresidents on Helena trails.

**Whitefish:** $6.4 million in annual spending by trail users (local & nonlocal).

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**Why did you move or stay in Whitefish?**

- **Summer recreation:** 4.5
- **Community:** 4.2
- **Winter recreation:** 4
- **Job:** 3.1
- **Family:** 3
- **Friends:** 2.6

1= not important; 5=very important

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**Important to Helena residents…**

- Nearby outdoor recreation
  - 4% Not Important
  - 2% Somewhat
  - 7% Neutral
  - 16% Important
  - 71% Very Important

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**MT Travel and Recreation**
BZN Route map 2019: 14 states, 17 destinations
Ski Area Visits

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</tr>
</thead>
<tbody>
<tr>
<td>Change</td>
<td>9%</td>
<td>-6%</td>
<td>3%</td>
<td>7%</td>
<td>-10%</td>
<td>4%</td>
<td>10%</td>
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MT Travel and Recreation
Glacier down 11% in 2018, but...

Yellowstone down 6% in 2018, but...
Does Infrastructure Development Help the Economy?
Short Term Rentals: Impacts on Affordable Housing in MT

Q1 visitor groups  Q2 visitor groups  Q3 visitor groups  Q4 visitor groups

2017  2018
National Travel Outlook

<table>
<thead>
<tr>
<th>Year</th>
<th>Domestic Leisure</th>
<th>Domestic Business</th>
<th>International</th>
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<tbody>
<tr>
<td>2017</td>
<td>1.8%</td>
<td>1.6%</td>
<td>-0.1%</td>
</tr>
<tr>
<td>2018</td>
<td>1.9%</td>
<td>2.0%</td>
<td>3.5%</td>
</tr>
<tr>
<td>2019</td>
<td>1.9%</td>
<td>1.6%</td>
<td>3.7%</td>
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MT Tourism Business Owners
% who expect an increase

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>2003</td>
<td>70%</td>
</tr>
<tr>
<td>2004</td>
<td>79%</td>
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<tr>
<td>2005</td>
<td>67%</td>
</tr>
<tr>
<td>2006</td>
<td>63%</td>
</tr>
<tr>
<td>2007</td>
<td>64%</td>
</tr>
<tr>
<td>2008</td>
<td>55%</td>
</tr>
<tr>
<td>2009</td>
<td>32%</td>
</tr>
<tr>
<td>2010</td>
<td>47%</td>
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<td>2011</td>
<td>55%</td>
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<td>2012</td>
<td>48%</td>
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<td>2013</td>
<td>64%</td>
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<td>2014</td>
<td>57%</td>
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<td>57%</td>
</tr>
<tr>
<td>2016</td>
<td>57%</td>
</tr>
<tr>
<td>2017</td>
<td>47%</td>
</tr>
<tr>
<td>2018</td>
<td>60%</td>
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</table>
Thank you!

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