



# **Travel & Recreation Outlook 2010:** **The year of Conscious Consumption**

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# Montana Travel Industry Quotes

- “They seem to be looking for less expensive ways to enjoy themselves.”
- “They shop around more. Don't plan as far ahead for a vacation. Many last minute bookings.”
- “Retail store sales are down, and people didn't sign up for as many activities.”
- “More camping, visiting national parks, shorter stays.”
- “There is a fear factor out there that makes people want to hold off a vacation until our nation/world economy is more stable. Somehow we need to portray the message that life is about living and creating memories despite what Wall Street says!”

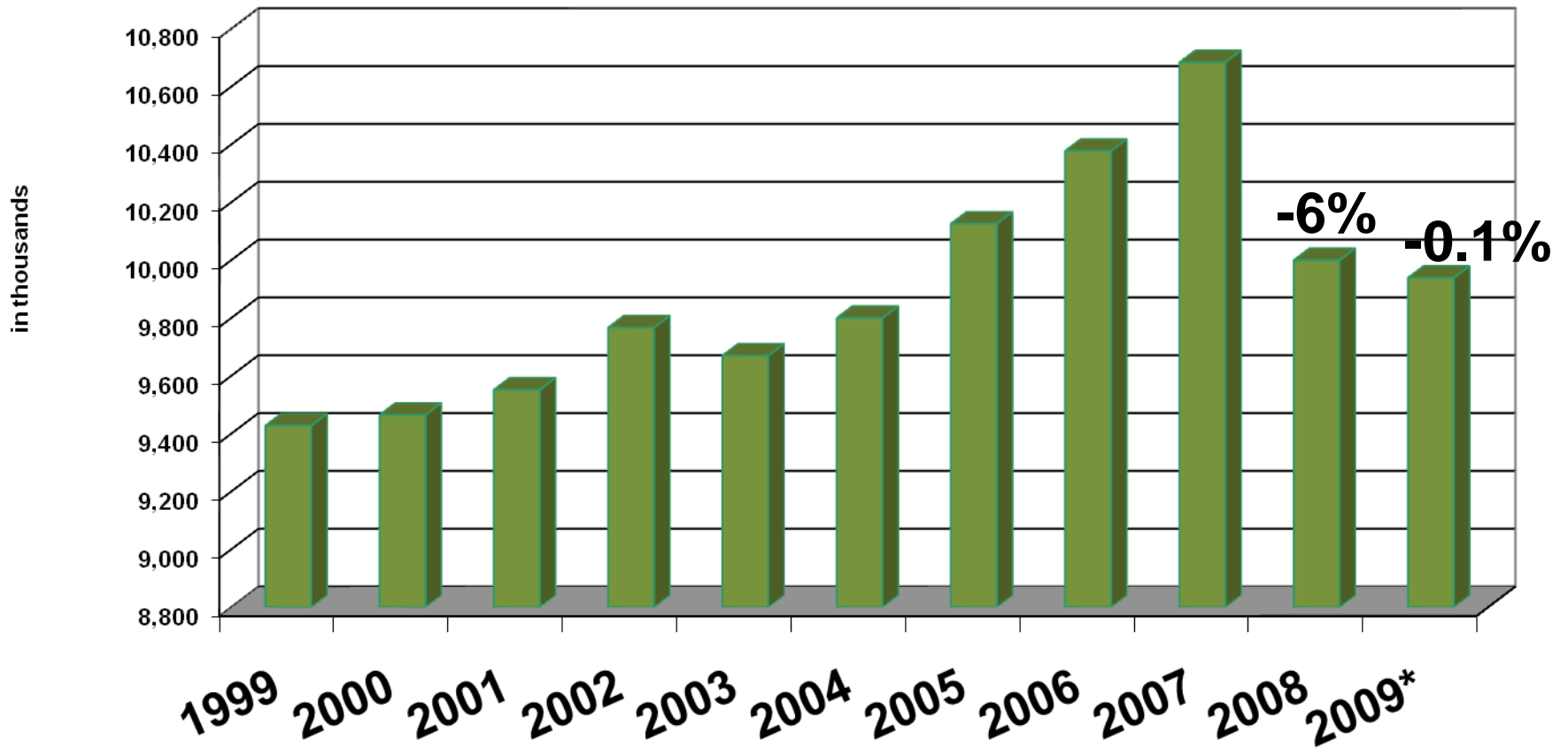


# U.S. Travel Segment Trends

	'09 Expected		'09 Expected
Lodging	-6.2%	National Parks	+4%
Domestic Air	-2%	Restaurant Industry	+2.5%
Attractions	-4 to -6%	Private Campground	+1%
RV sales	-54%	Snowmobile Reg.	+1%
Boat sales	-30 to -35%		
Alpine Skiing	-5%		



# Montana Nonresident Visitor Trends 1999-2009 (p)



# Conscious Consumption!

## U.S. 2009

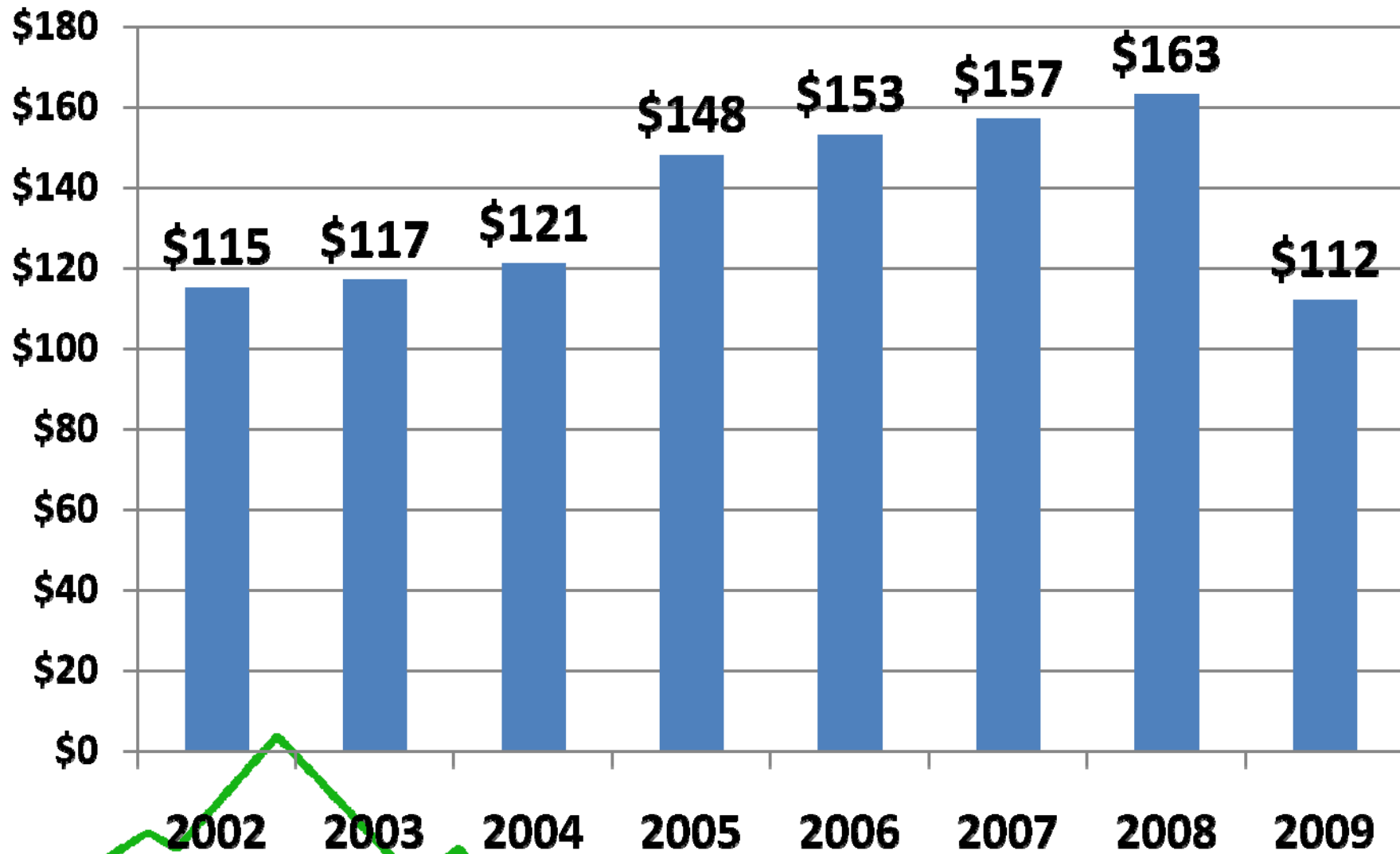
- discretionary consumer spending down 30%.
- Domestic leisure travel spending: -10.3%
- Domestic business travel spending: -13.6%
- International travel spending: - 16%

## Montana Tourism Businesses:

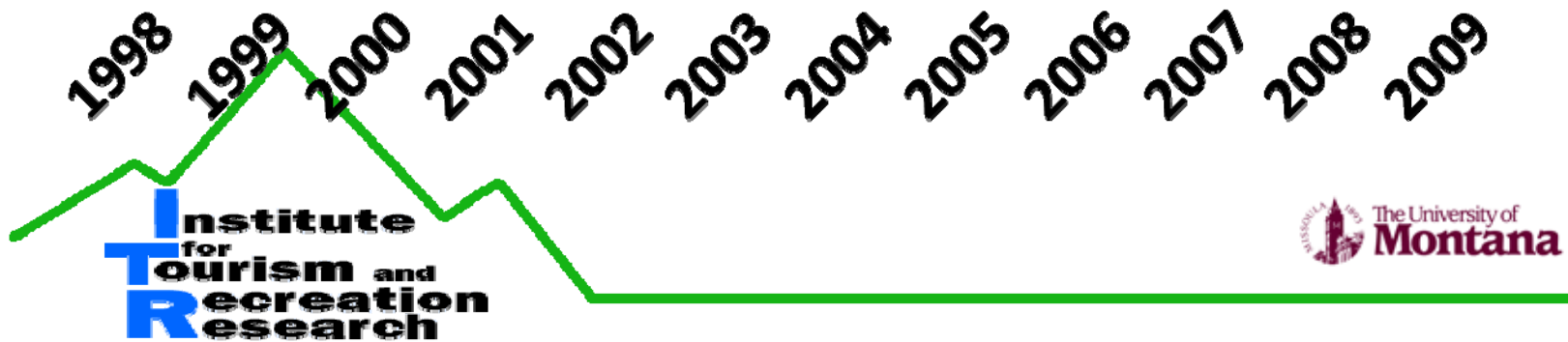
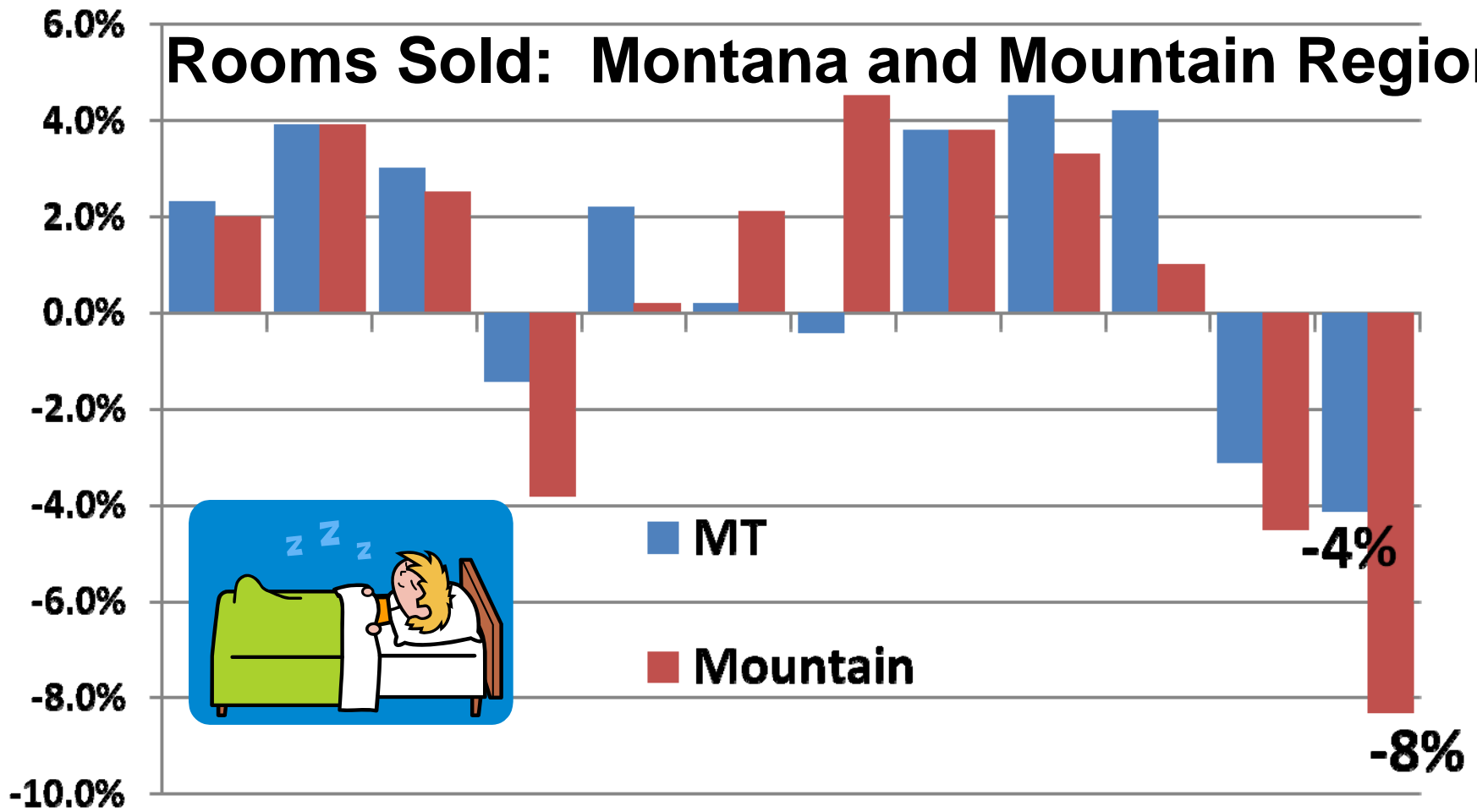
- 55% said retail down
- 47% said dining out down
- 60% said visitors looking for less expensive activities
- 39% saw more staycations
- 33% saw length of stay decreased
- 53% observed more last minute bookings



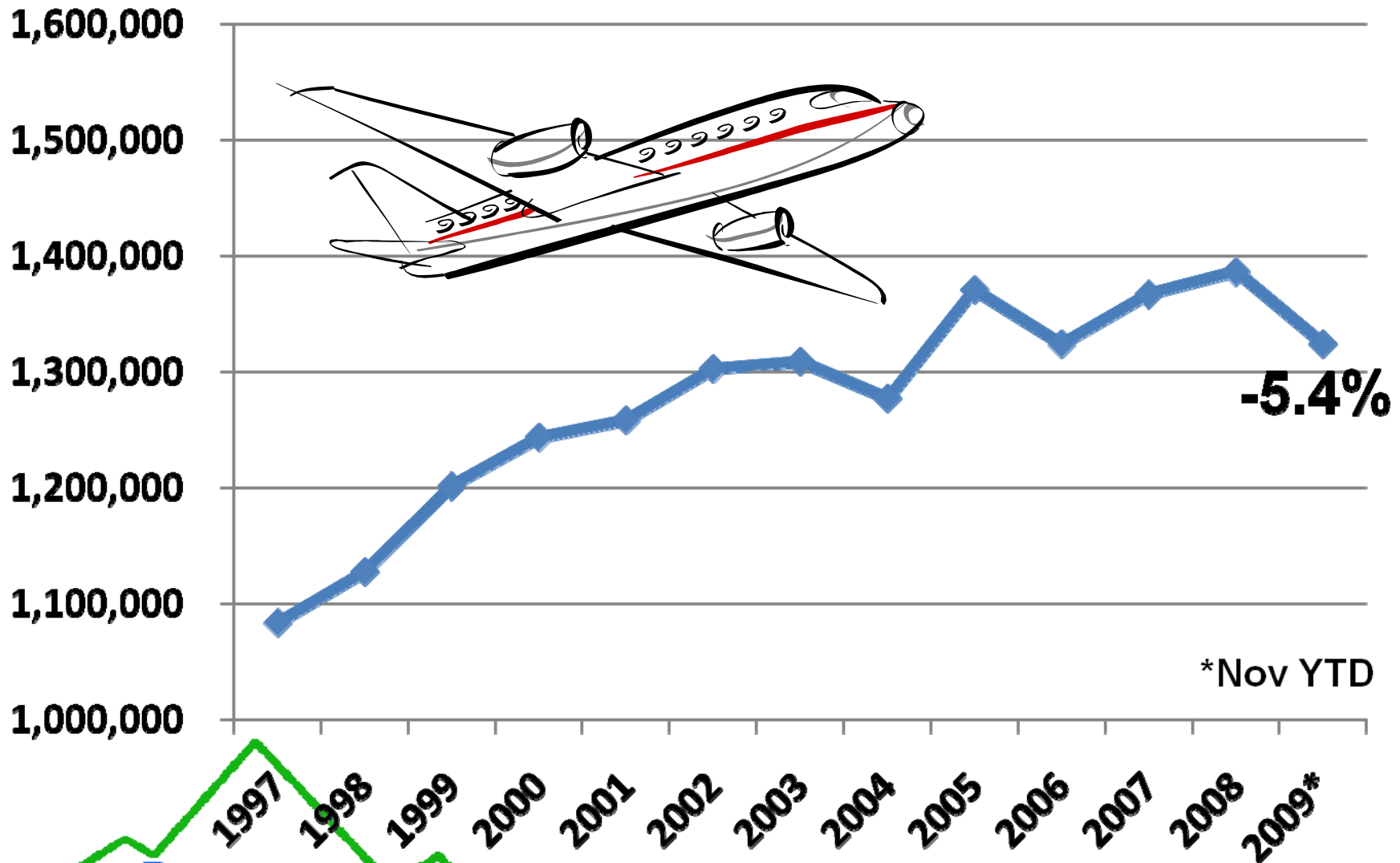
# 3rd Q Average Daily Expenditures



# Rooms Sold: Montana and Mountain Region



# Montana Air Traffic 1997-2009



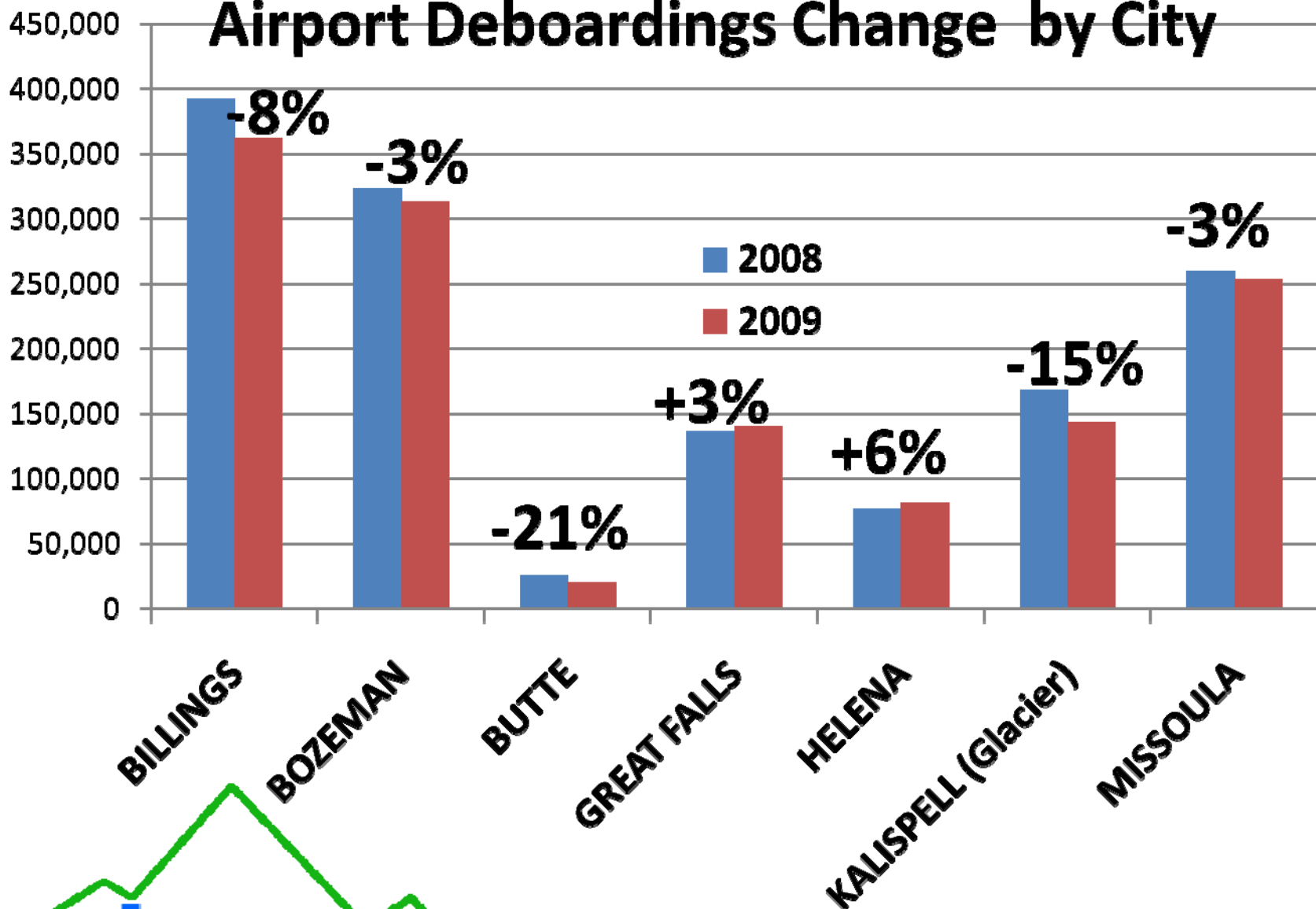
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Source: Montana Aeronautics Division

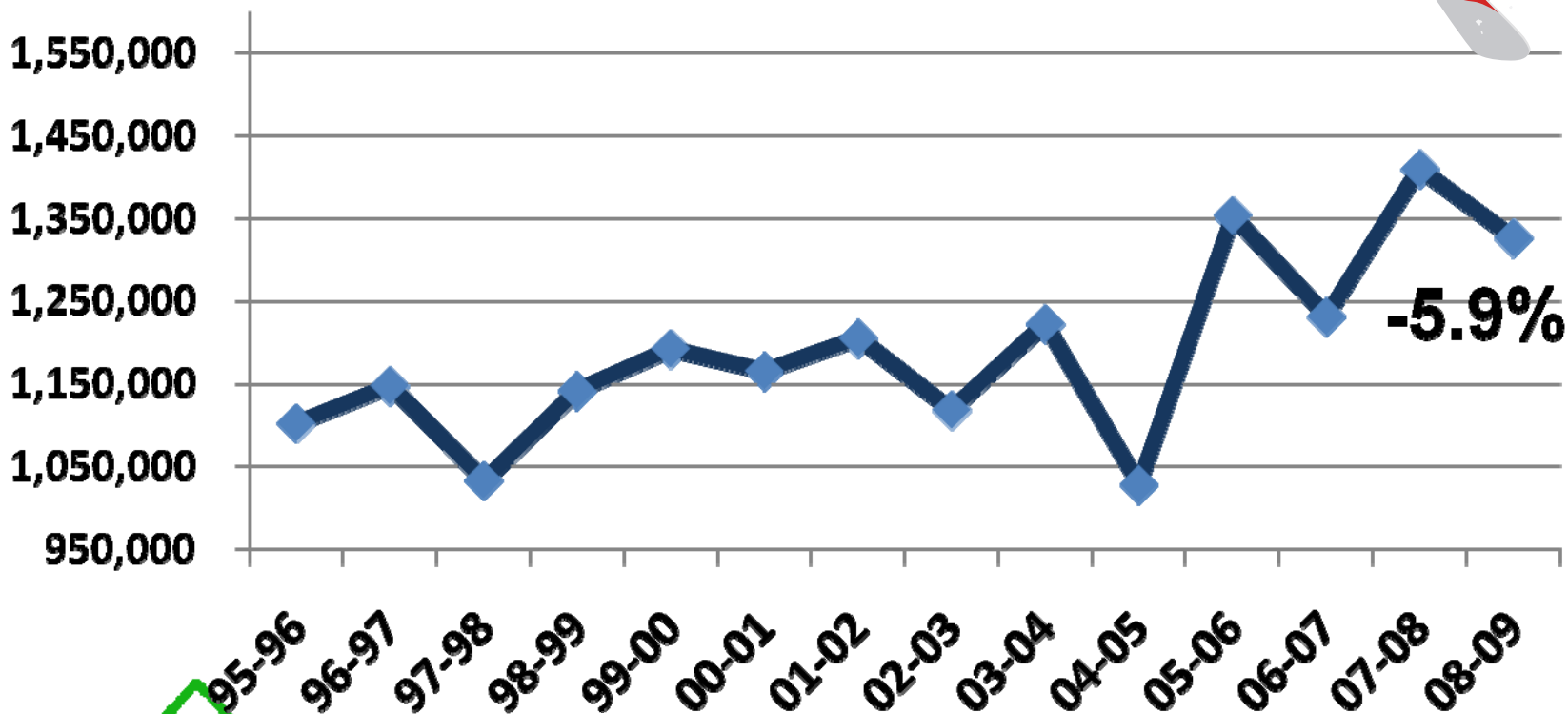




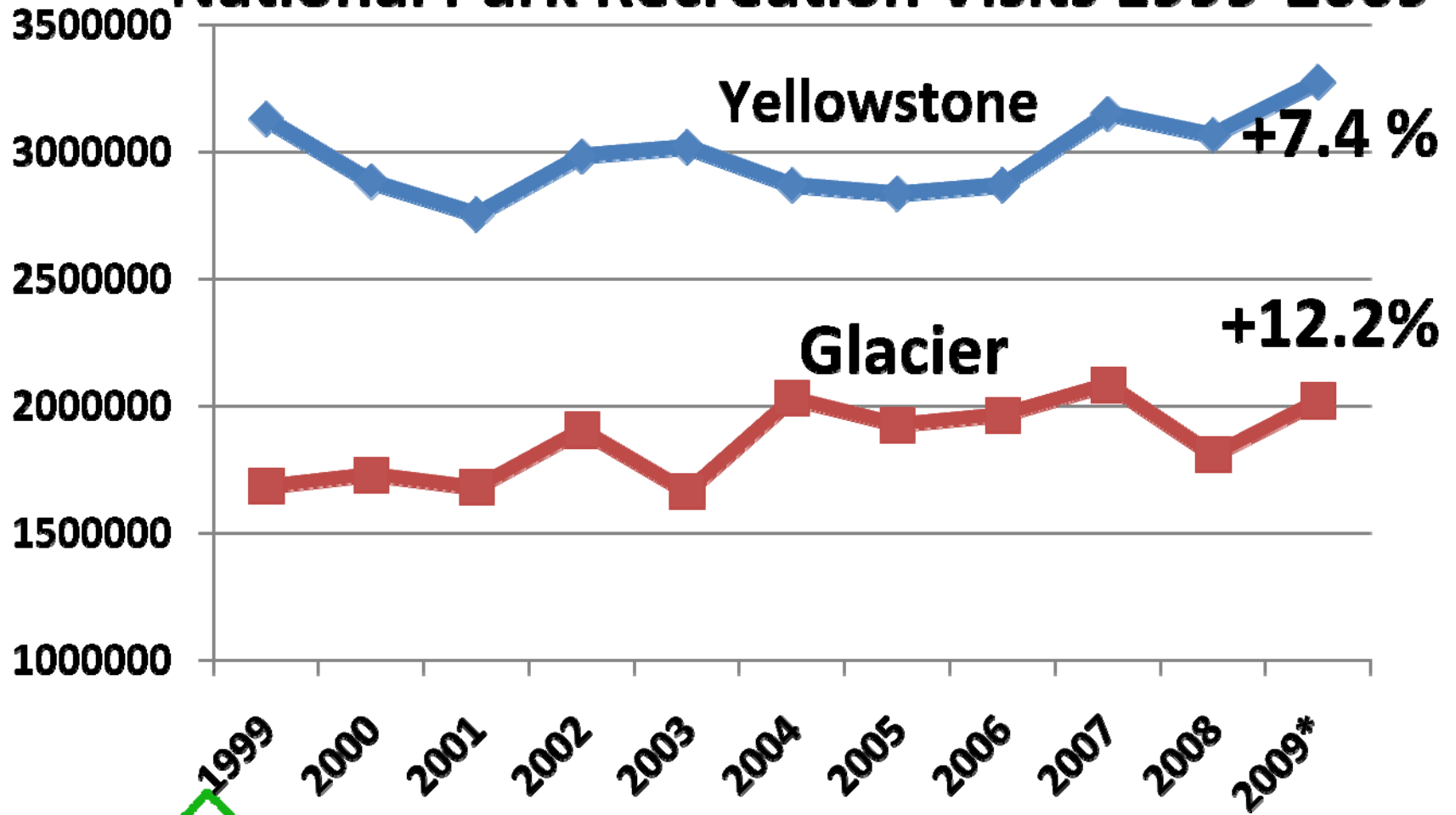
# Airport Deboardings Change by City



# Montana Ski Area Visits 1995-2008

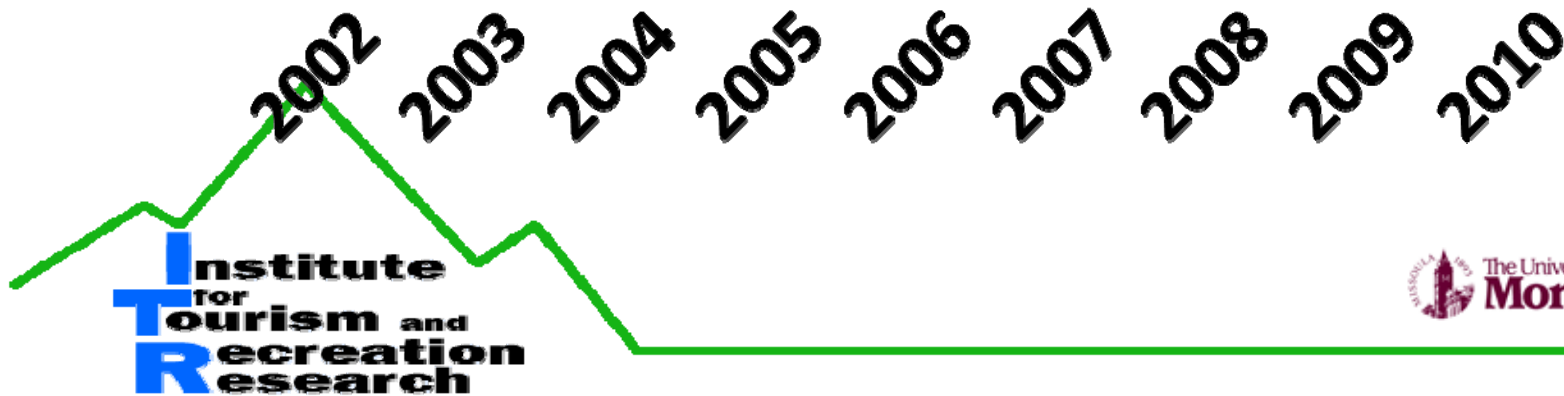
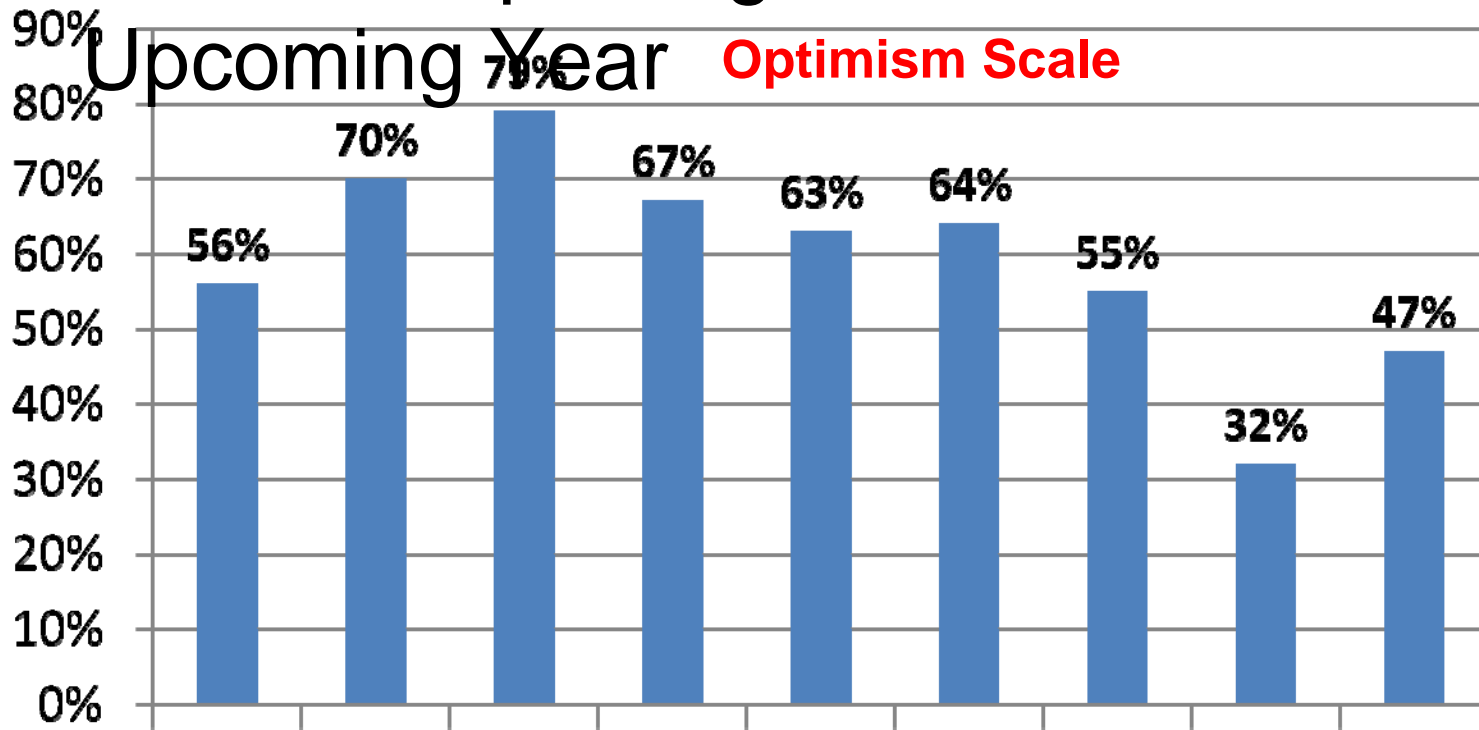


# National Park Recreation Visits 1999-2009



# Percent of MT Tourism Business Owners Expecting an Increase in

## Upcoming Year **Optimism Scale**



# 2010 Travel Projections

- U.S. Leisure person-trips +1.9%
- U.S. Business person-trips +2.5%
- U.S. International Inbound +2.8%
- overseas +1.2%
- MT nonresident visitation +2.0%

\*Source: US Travel Association and ITRR



# Thank you!

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