

Travel and Recreation Trends & Outlook



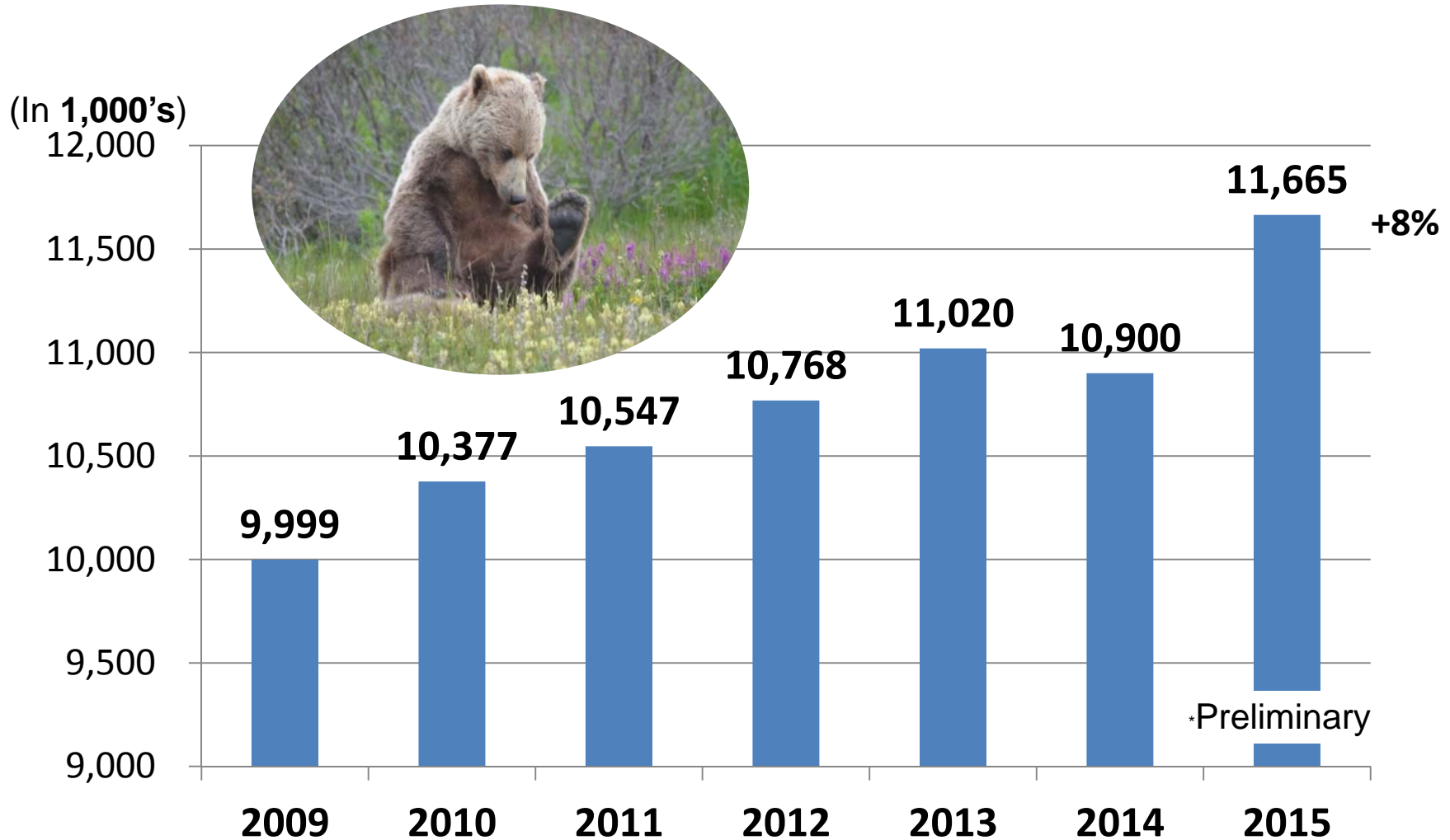
**Norma
Nickerson**

**Institute for
Tourism &
Recreation
Research**

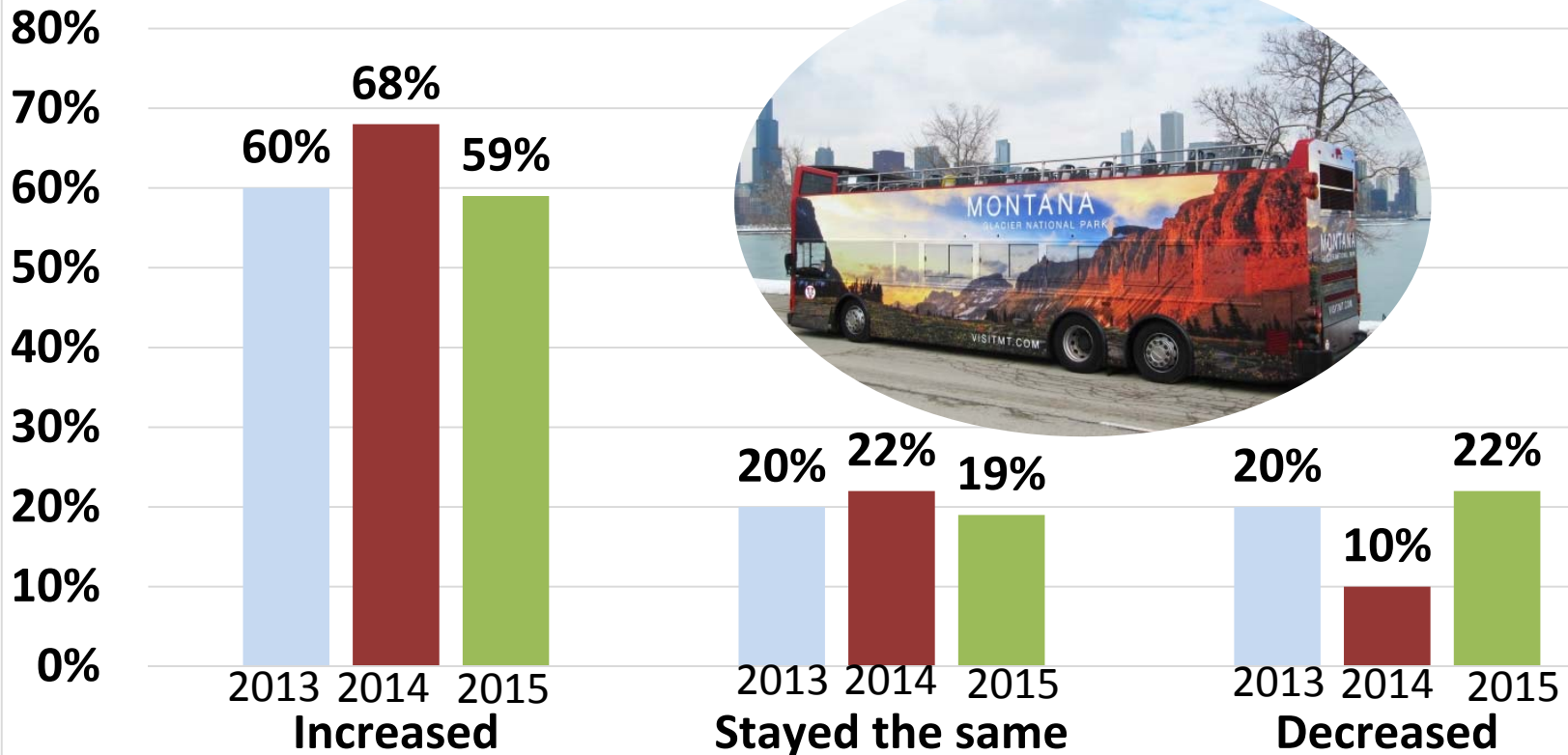
**College of
Forestry and
Conservation**

**University of
Montana**

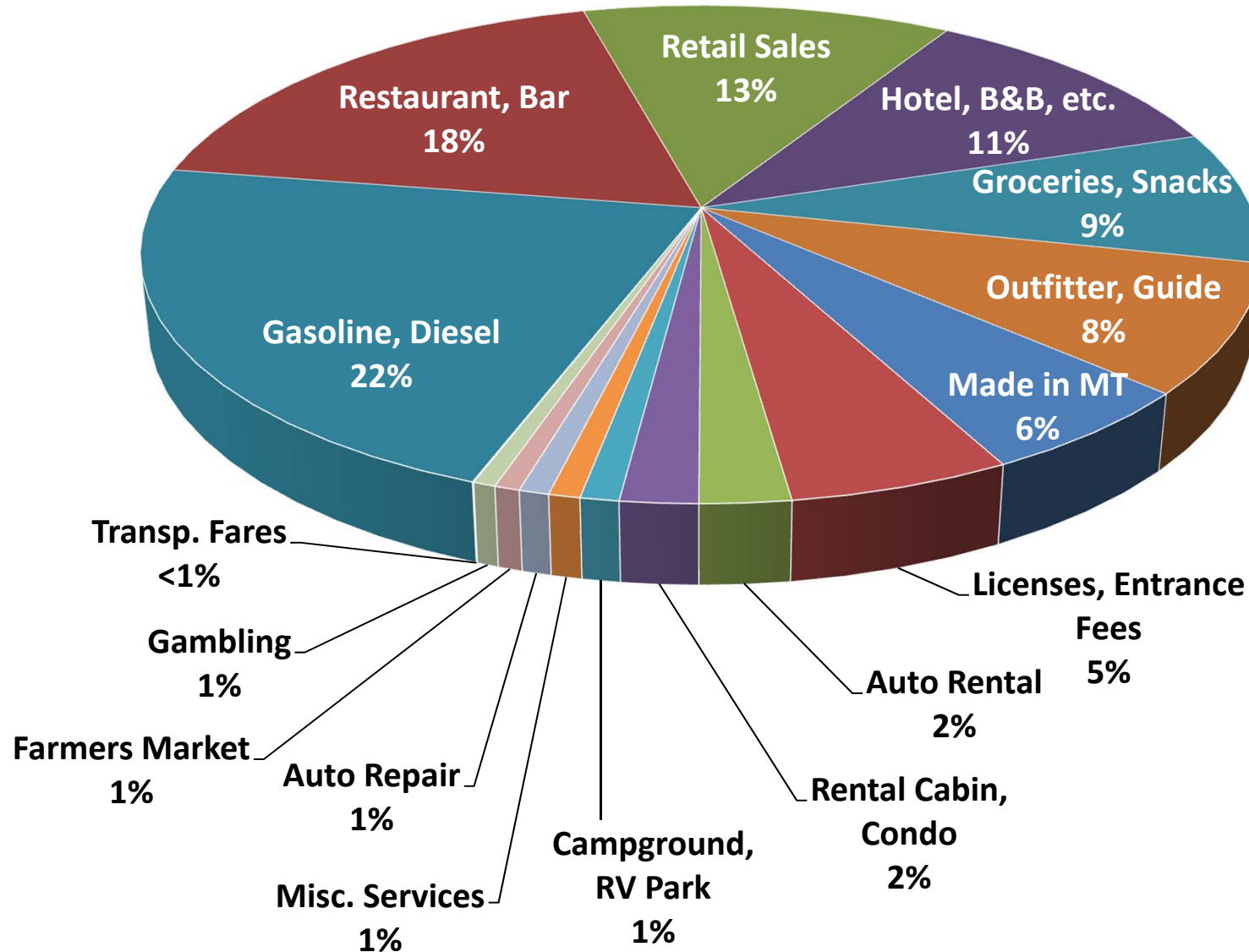
Nonresident Visitation to MT



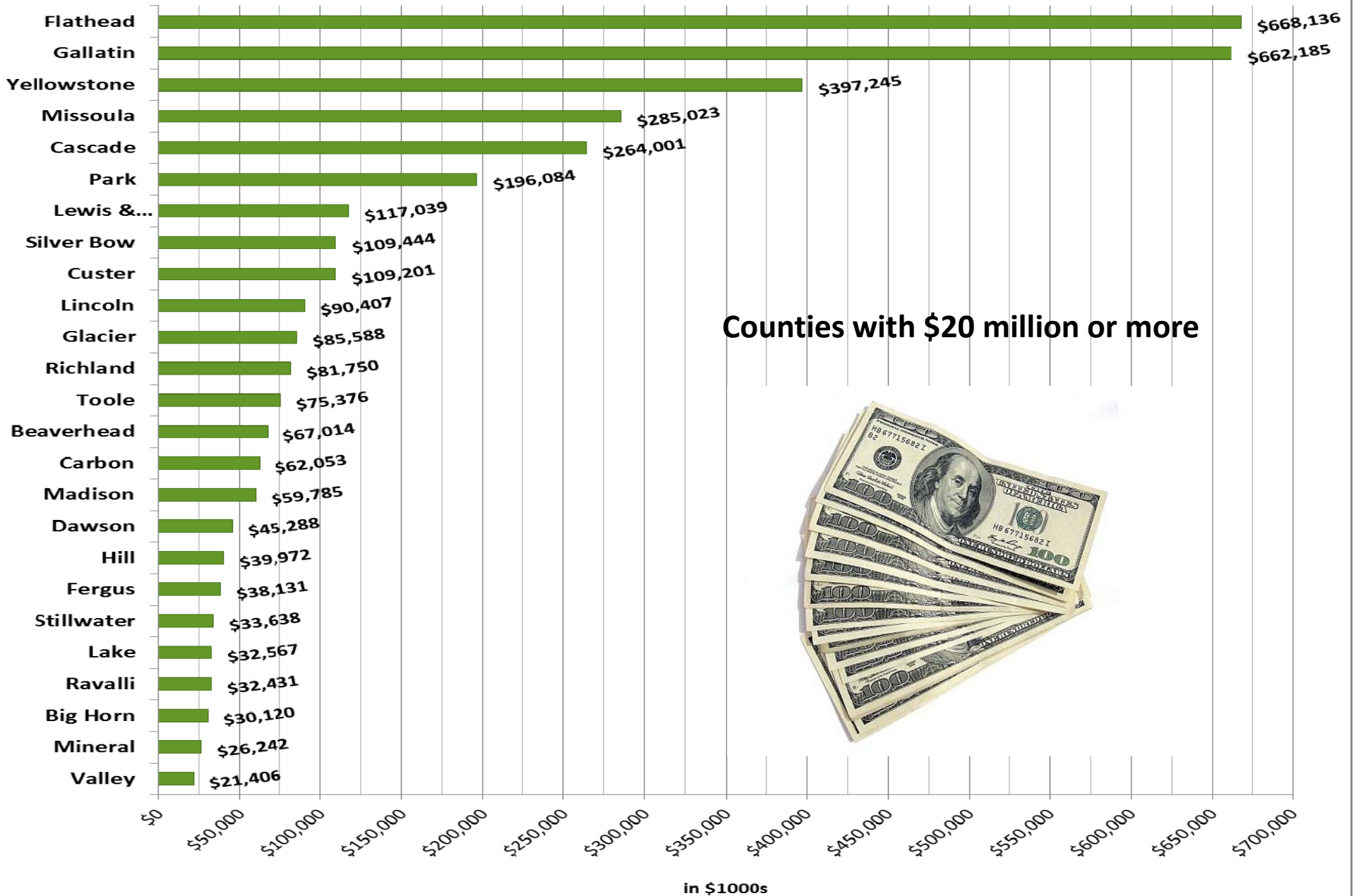
Tourism Business Owners: Customer % change 2013-2015



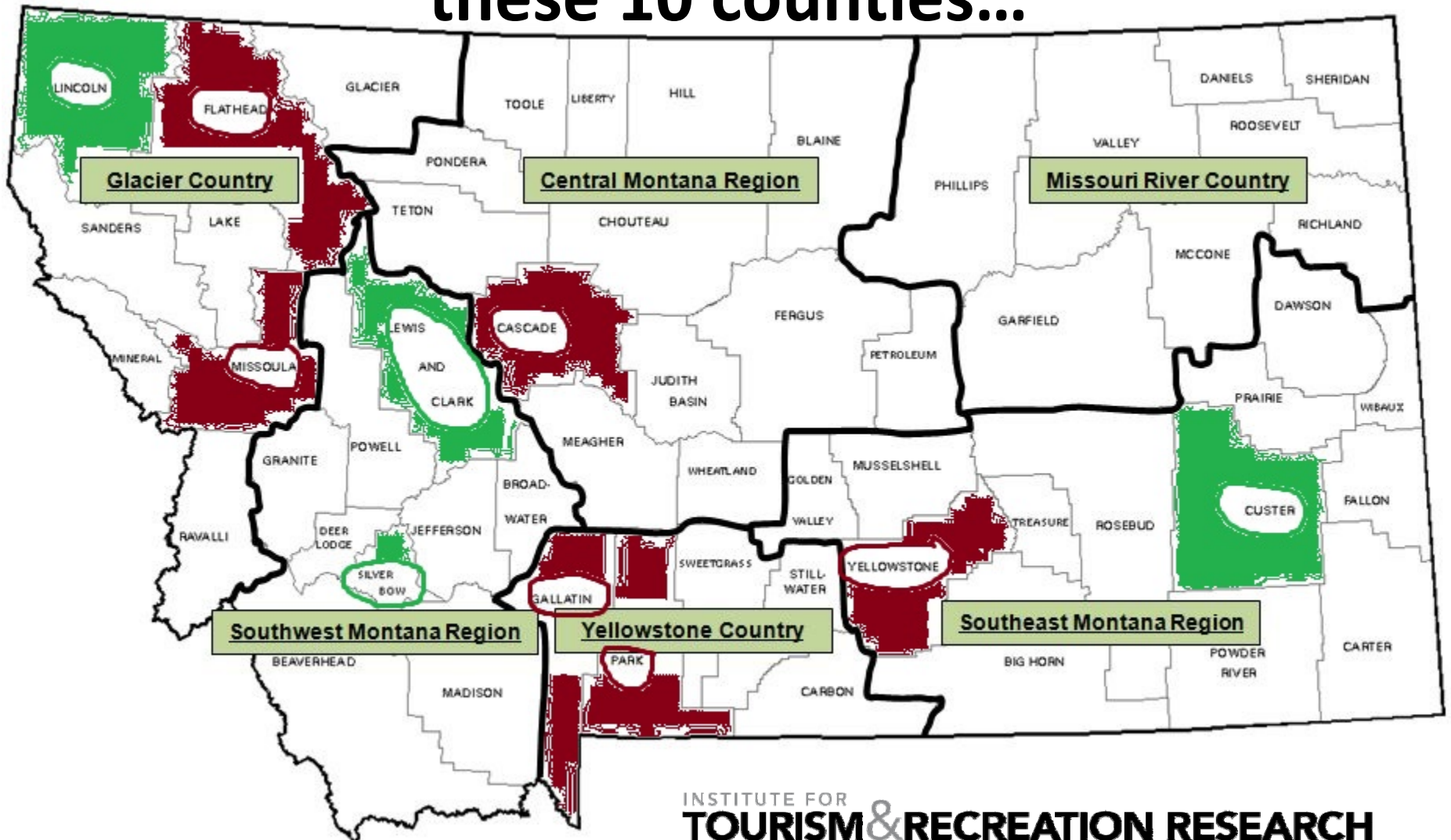
\$3.59 billion nonresident *preliminary* spending in 2015



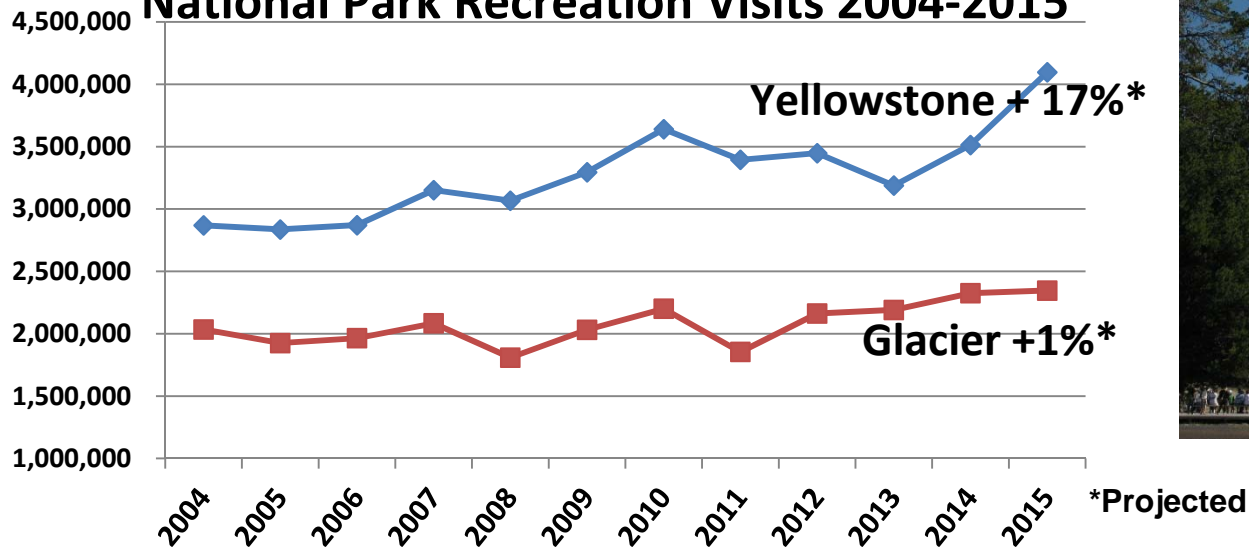
2013-2014 Estimate of Nonresident Traveler Spending per County



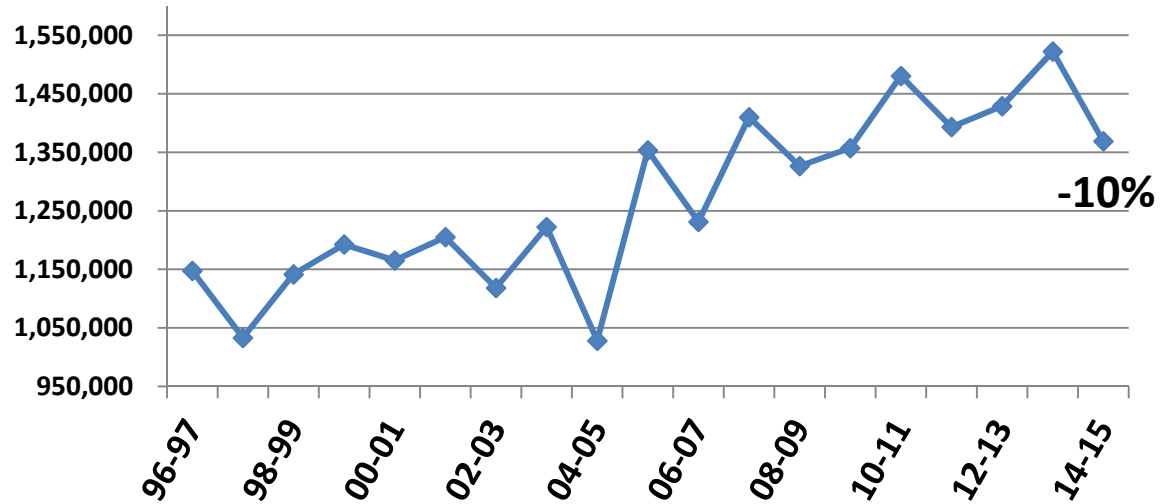
**Another way to visualize it:
72% of all nonresident spending occurs in
these 10 counties...**



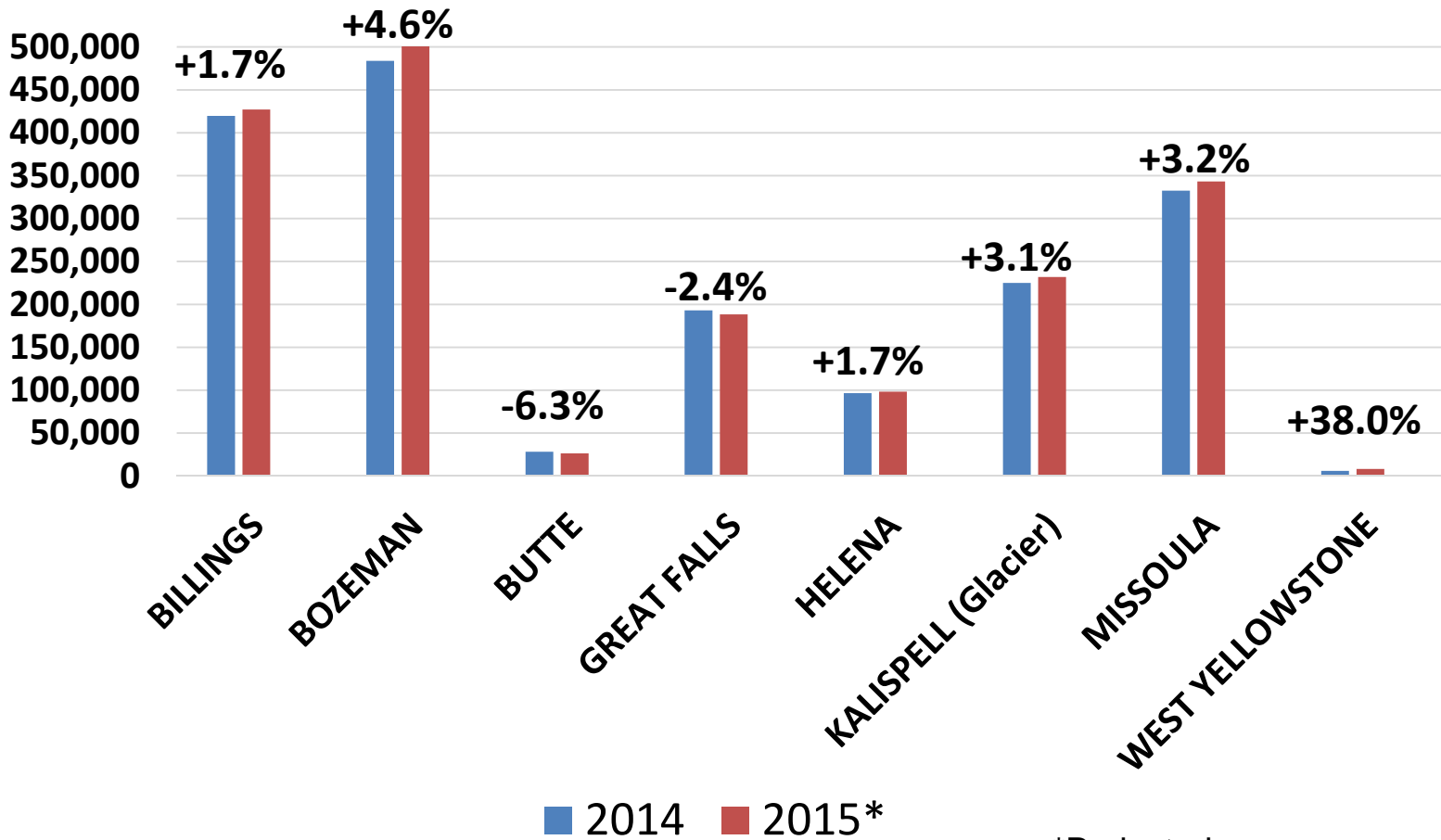
National Park Recreation Visits 2004-2015



Montana Ski Area Visits 1996-2015



Airport Deboardings Change by City: 2014-15*



*Projected

Most Popular Outdoor Recreation*

Top Youth Activities (6-24 yrs.)

- Running, jogging, trail running
- Bicycling (road, mountain, BMX)
- Camping (car and RV)
- Fishing (fresh, salt, and Fly)
- Hiking

Top Adult Activities (25+ yrs.)

- Running, jogging, trail running
- Fishing (fresh, salt, and Fly)
- Bicycling (road, mountain, BMX)
- Hiking
- Camping (car and RV)



Demographics in Travel

- **Millennials travel differently than Boomers**
 - airBnB, VRBO, Uber, Vayable
- **Both Boomers and Millennials want experiences**
- **Both Boomers and Millennials are more interested in the authentic rather than the contrived experience**
- **Millennials spend considerably less than Boomers**



International Travel in MT

Top overseas countries: MT tourism business survey

UK

China

Germany

Japan

Australia

France

Netherland



Mixed Outlook for 2016 because...

- Discretionary income (up)
- Unemployment (steady)
- Household debt (down) except for Millennials
- US dollar (strong)
- Intention to travel (up) but staying closer to home
- Gas prices (low)
- Election year jitters



Montana 2016 Outlook

- **Expect increases to Glacier and Yellowstone National parks**
- **Only 5% of MT Tourism business expect a decrease in 2016.**
- **Last year we said spending would be up 2-5% when in fact it was actually down. New normal?**
- **Made in MT products and MT experiences will continue to be a growth sector in the travel industry.**



Thank you!

For more local data and information go to:

www.itrr.umt.edu



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