

2019 Travel & Recreation Trends and Outlook

**Norma P. Nickerson, Director
&
Jeremy Sage, Economist and
Associate Director**

**Institute for Tourism and
Recreation Research**

**W.A. Franke College of
Forestry and Conservation**

University of Montana

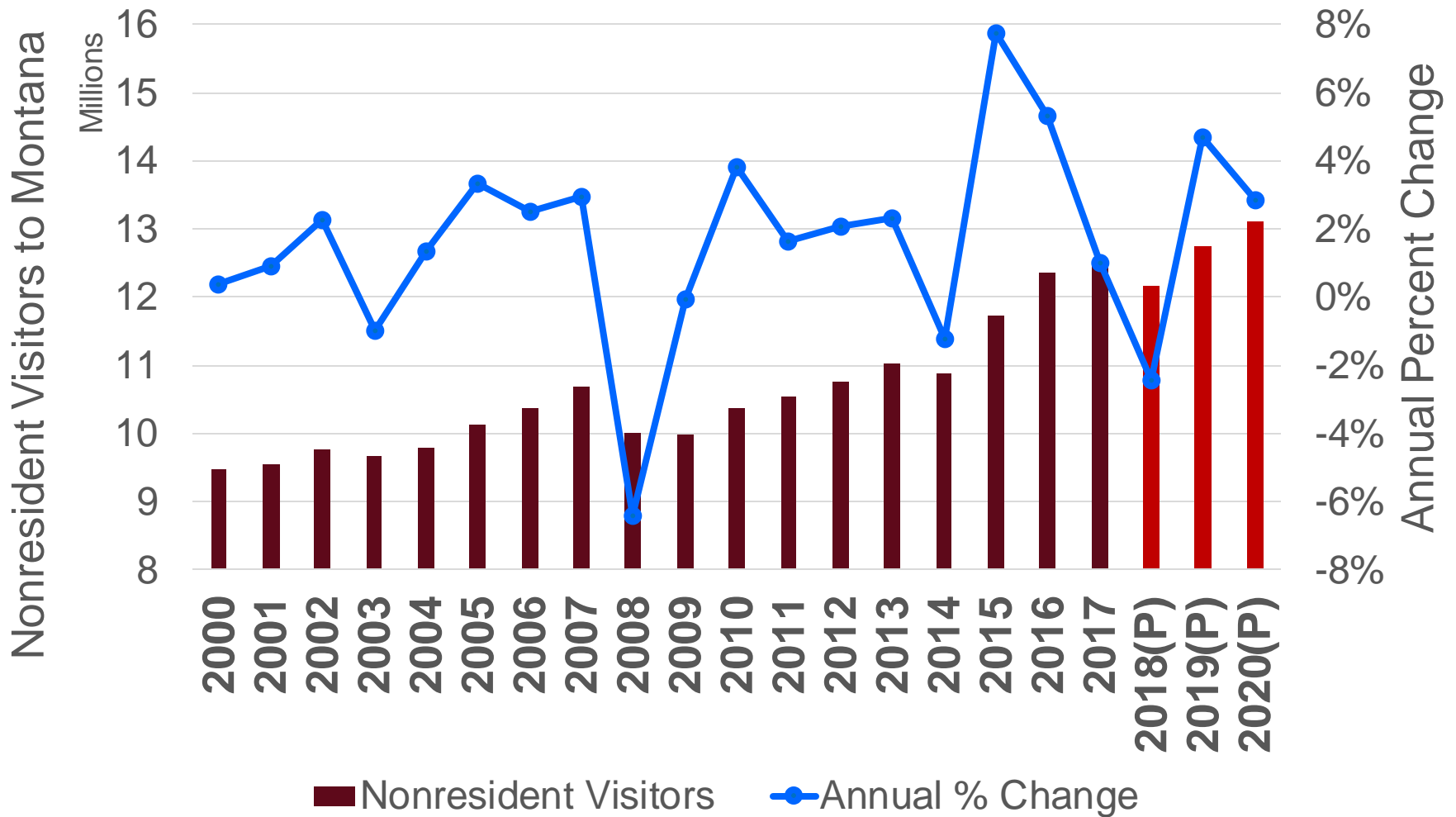
HEAVENS PEAK

PHOTOGRAPHY

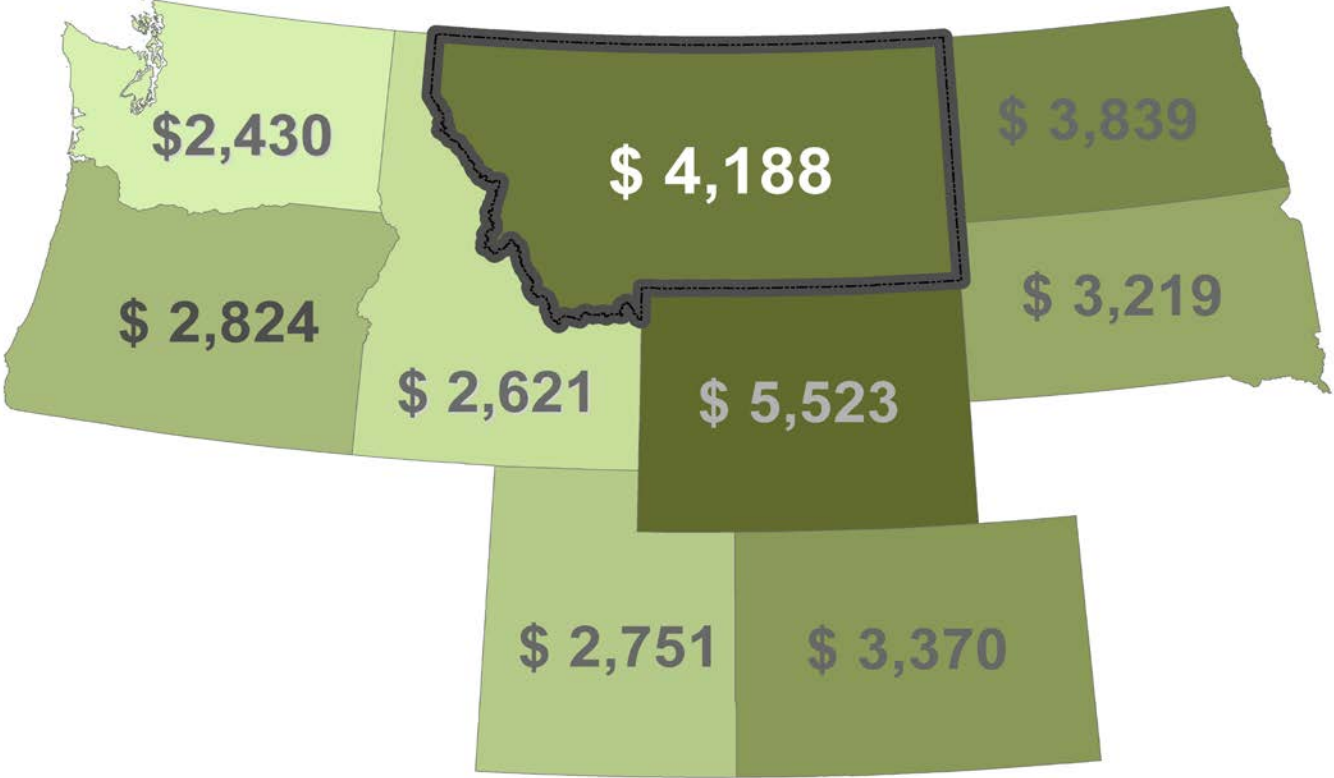
INSTITUTE FOR
TOURISM & RECREATION RESEARCH
UNIVERSITY OF MONTANA

MT Travel and Recreation

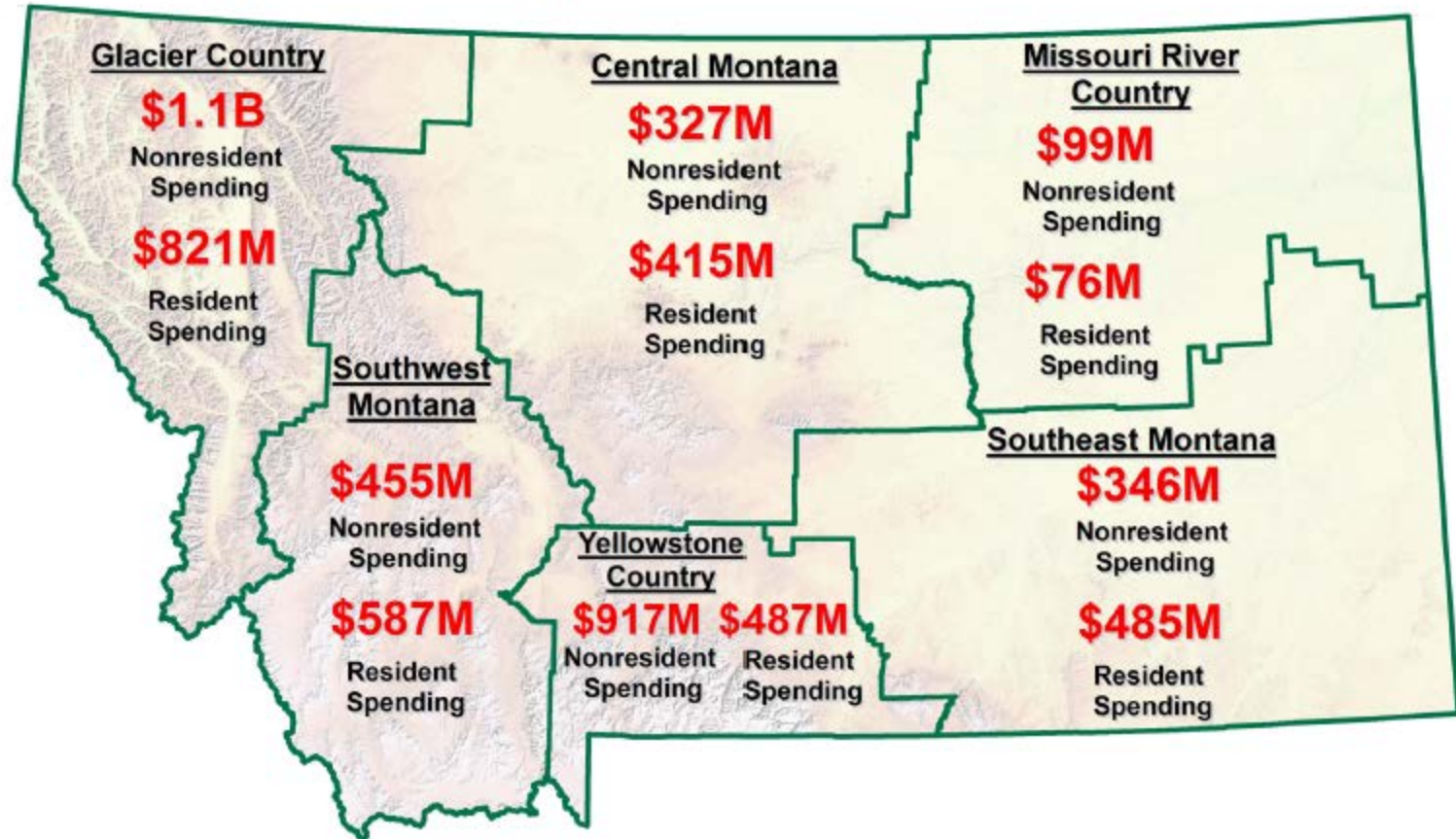
Overall growth in visitor numbers



Montana ranks second in visitor spending per capita in Western states



Travelers spend money in all corners of the state.

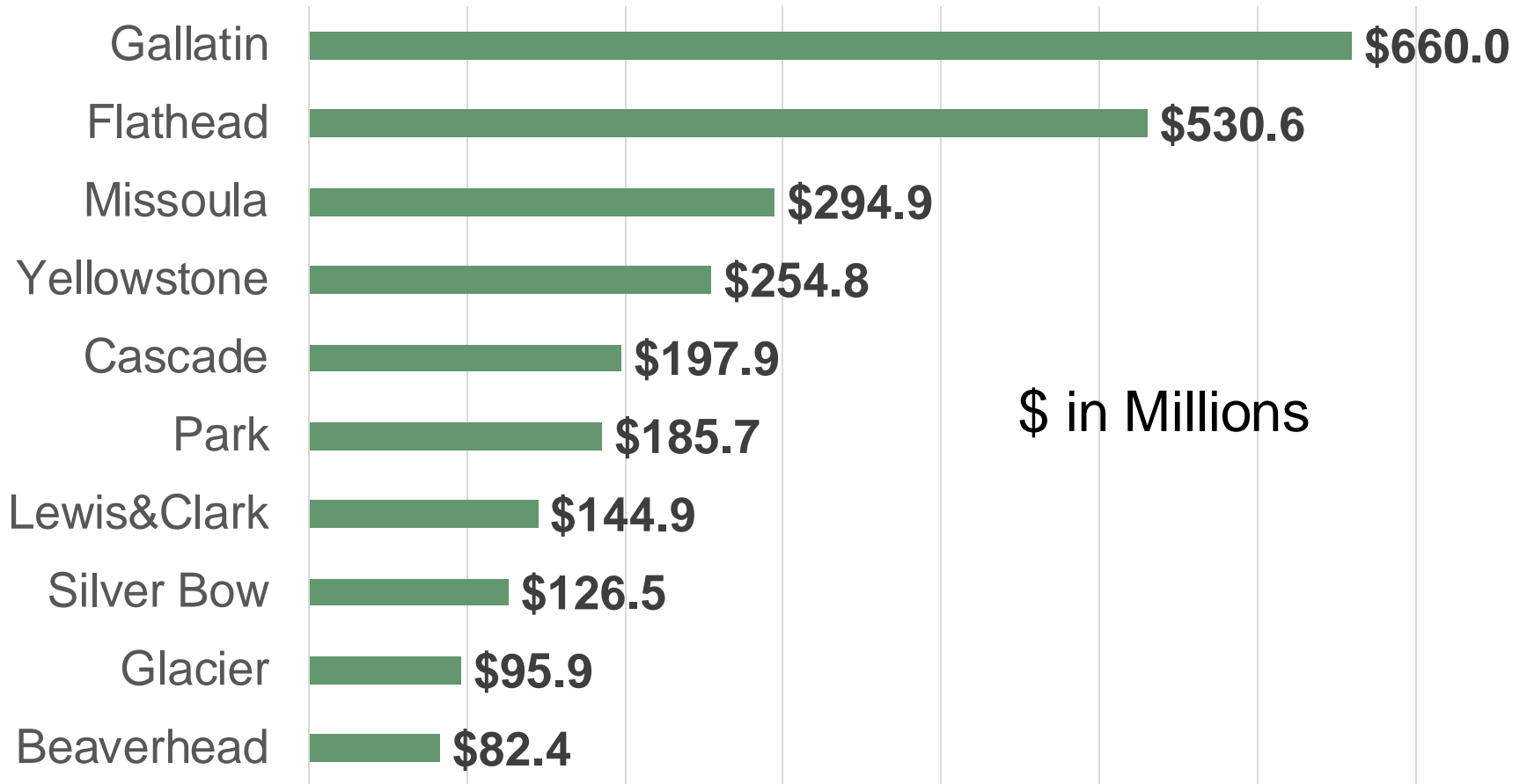


2018 Nonresident Preliminary:

\$3.7 billion in spending. \$5.2 billion in full economic.

Supported 58,800 jobs. \$1.7 billion in associated labor income.

Nonresident Spending/County



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

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**



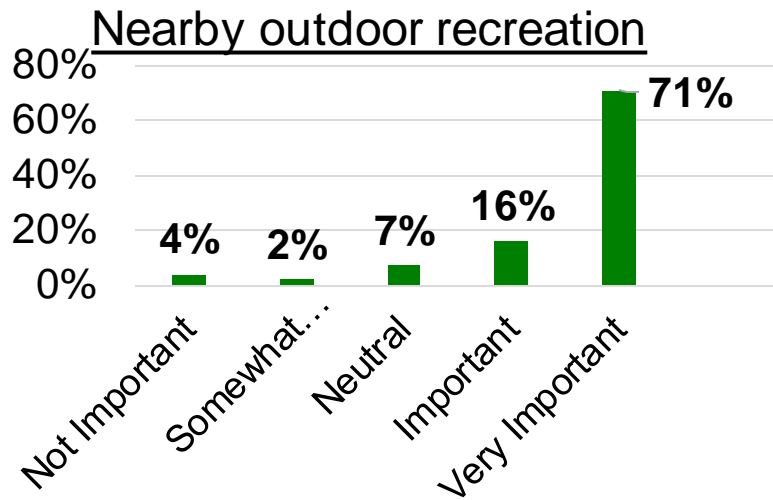
Local Impact of trails on communities

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

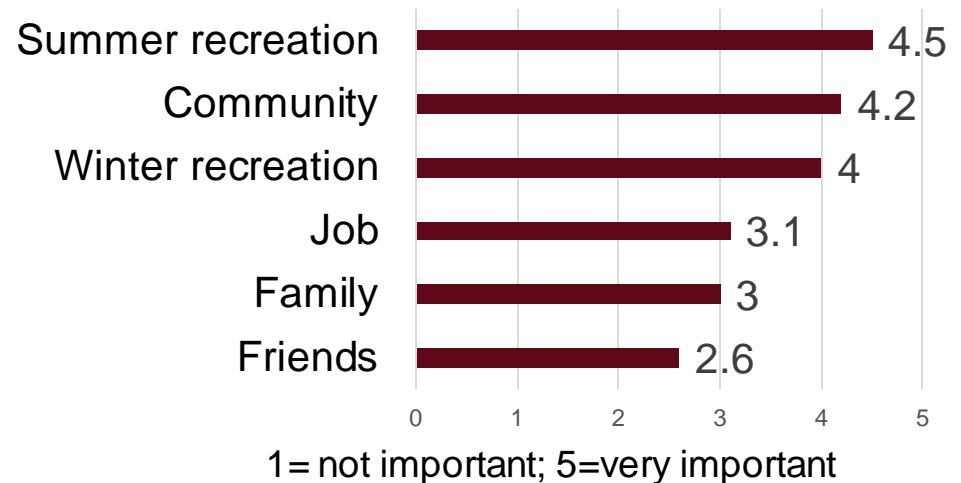
Whitefish: \$6.4 million in annual spending by trail users (local & nonlocal).



Important to Helena residents...



Why did you move or stay in Whitefish?

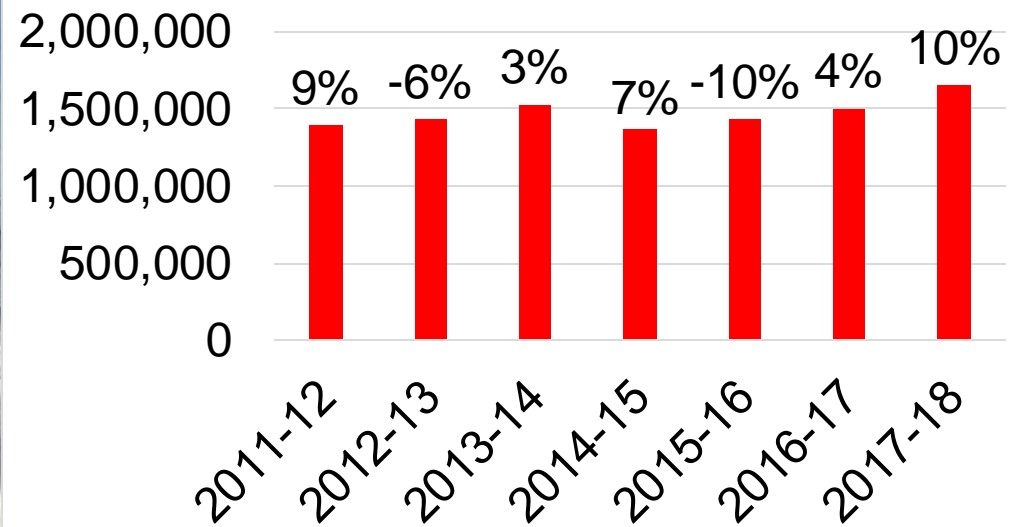


BZN Route map 2019: 14 states, 17 destinations





Ski Area Visits



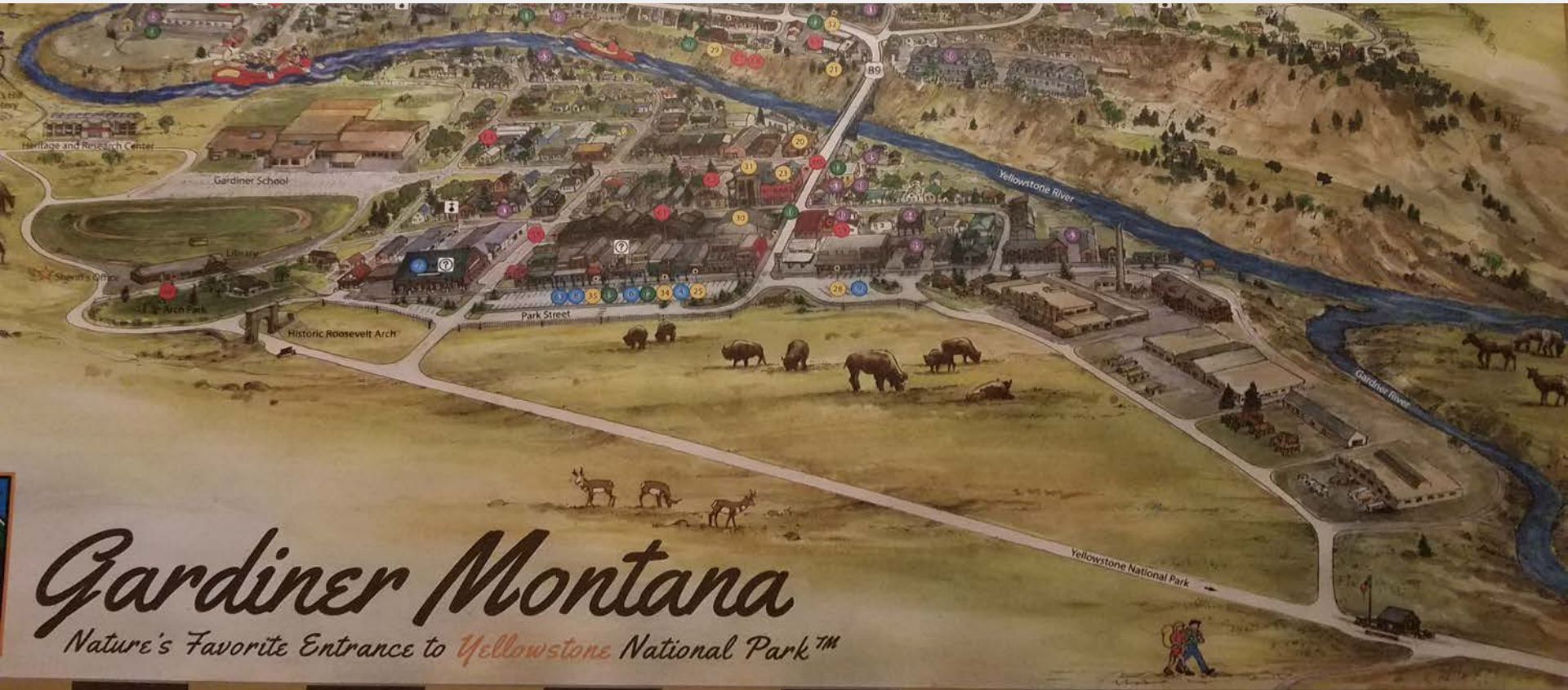


Glacier down
11% in 2018,
but...

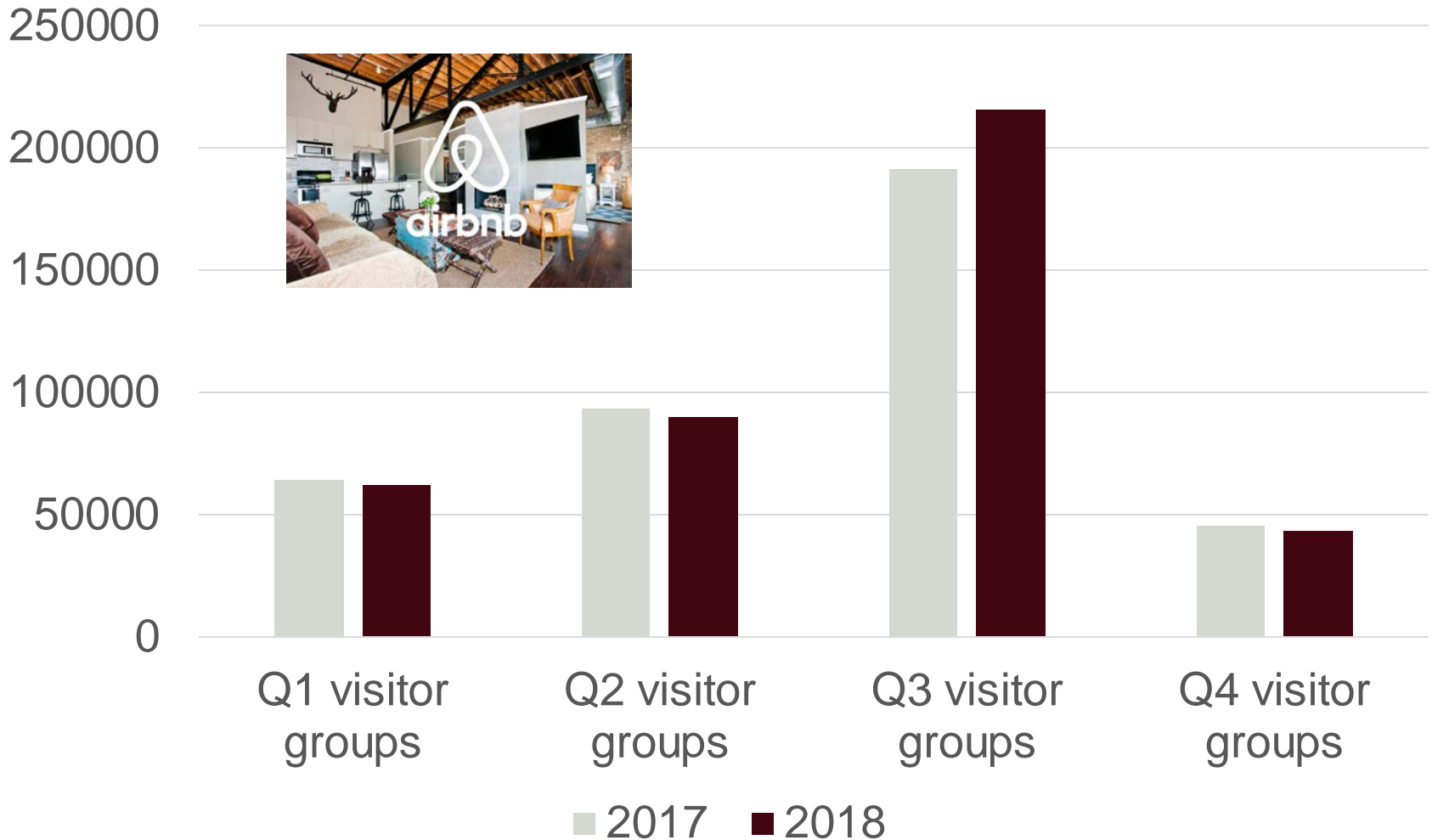
Yellowstone
down 6% in
2018, but...



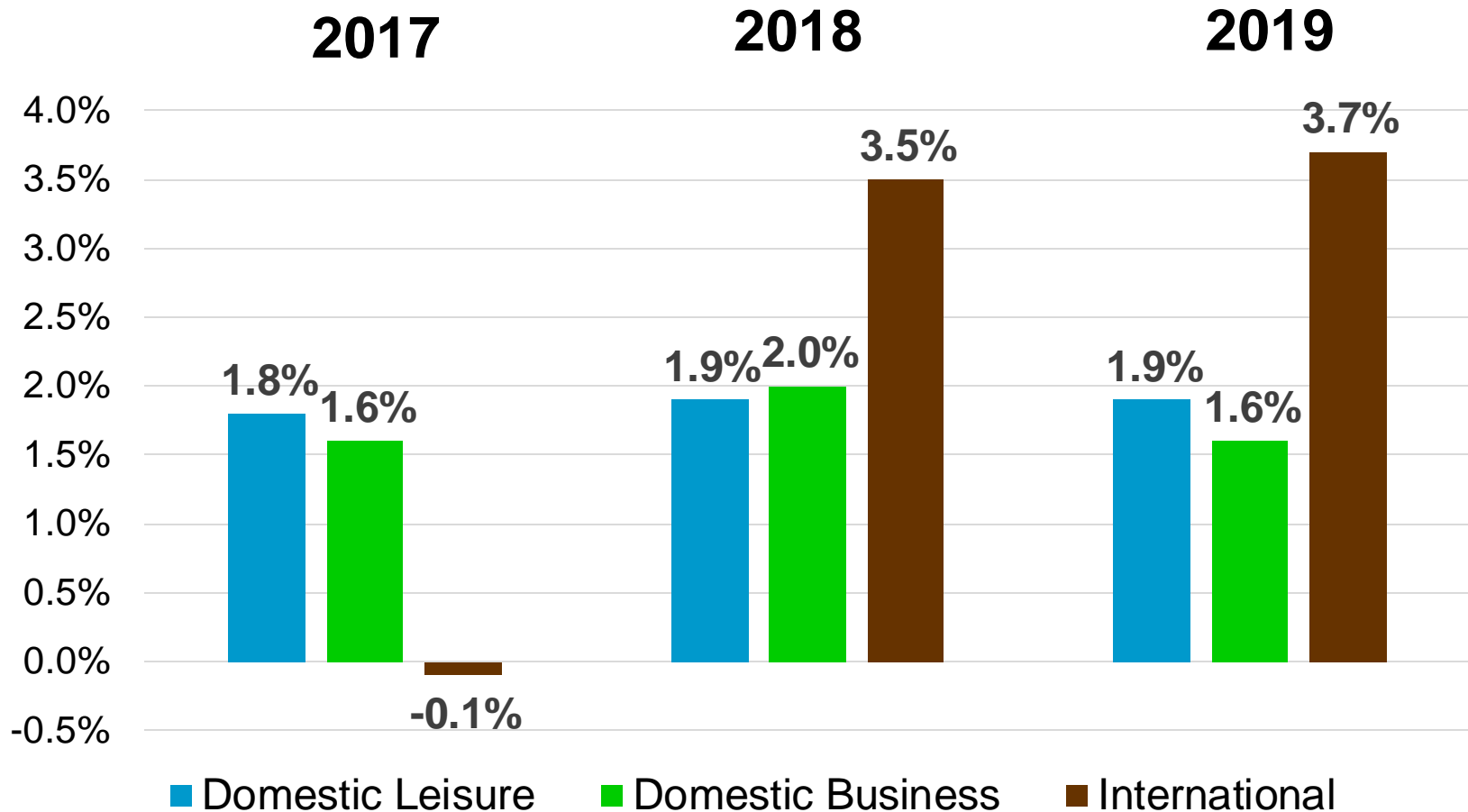
Does Infrastructure Development Help the Economy?



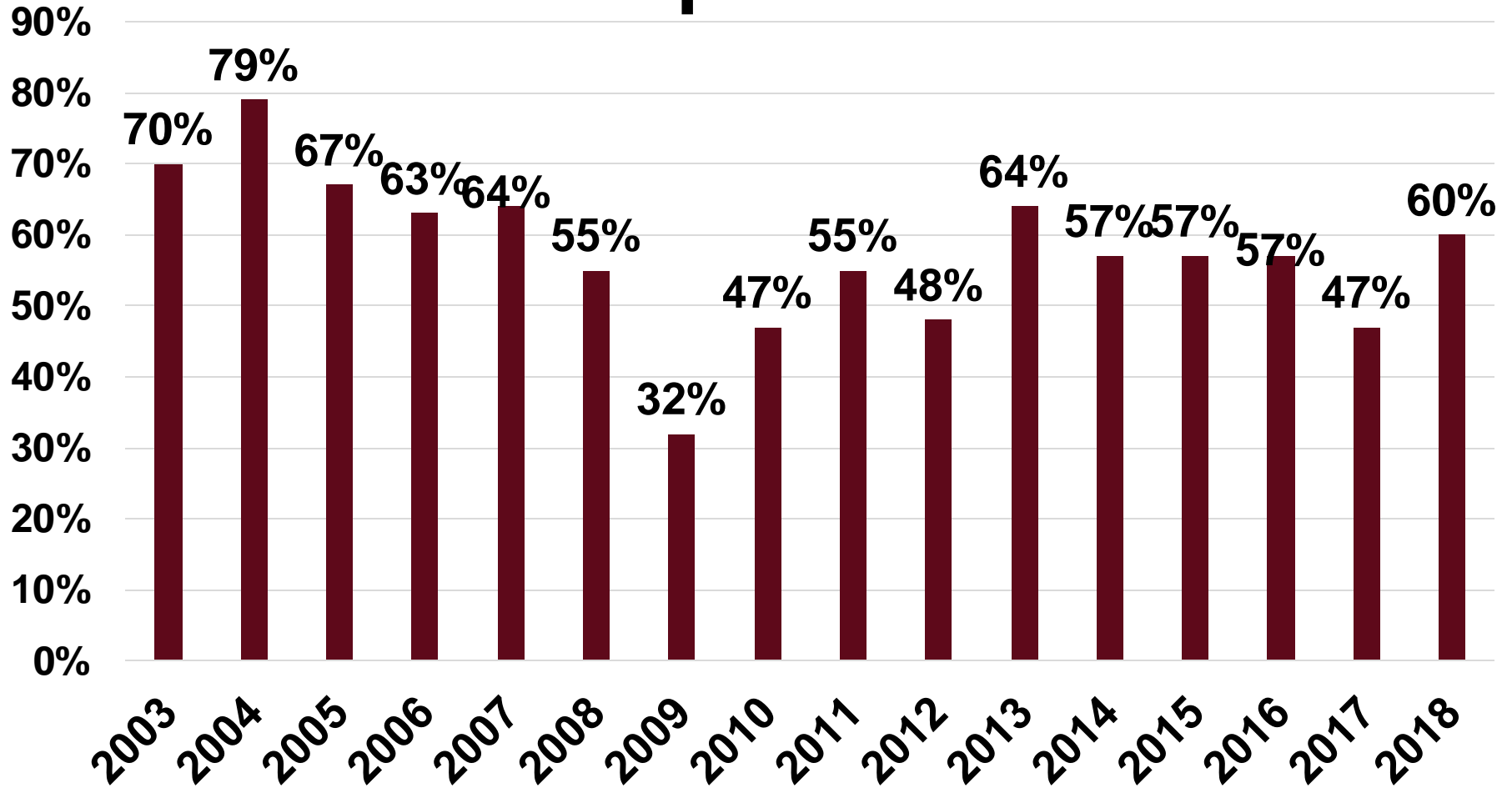
Short Term Rentals: Impacts on Affordable Housing in MT



National Travel Outlook



MT Tourism Business Owners % who expect an increase





Thank you!
www.itrr.umt.edu