

Travel & Recreation Trends and Outlook



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Hindsight is 20/20
If we had only known!
Tourism & Recreation
Challenges & Opportunities

1

WORST SUMMER YET FOR SEASONAL STAFFING SHORTAGE

September 22, 2019 at 5:00 am | By BRYANNE

SERBIN
Daily Inter Lake

Employee Shortage Causes Bozeman Taco John's to Close

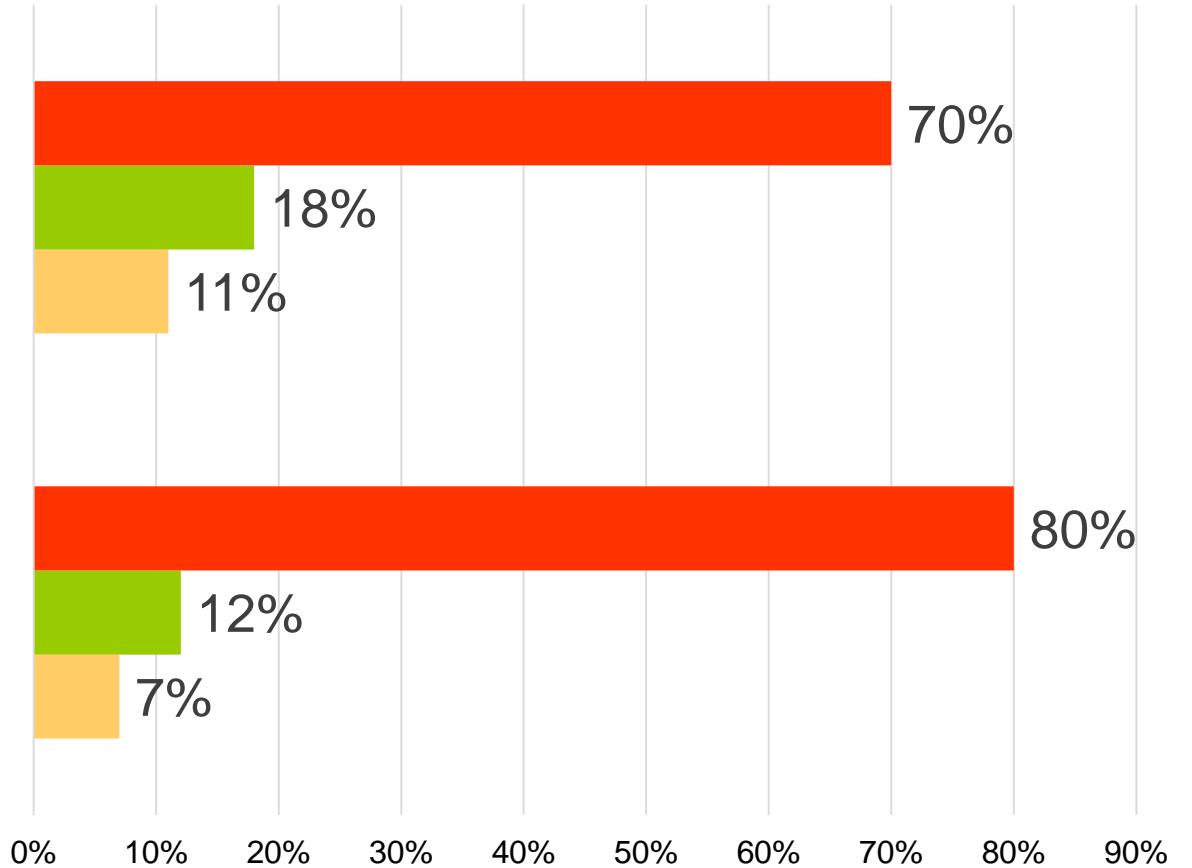
Bozeman struggles with service industry workforce shortage ...



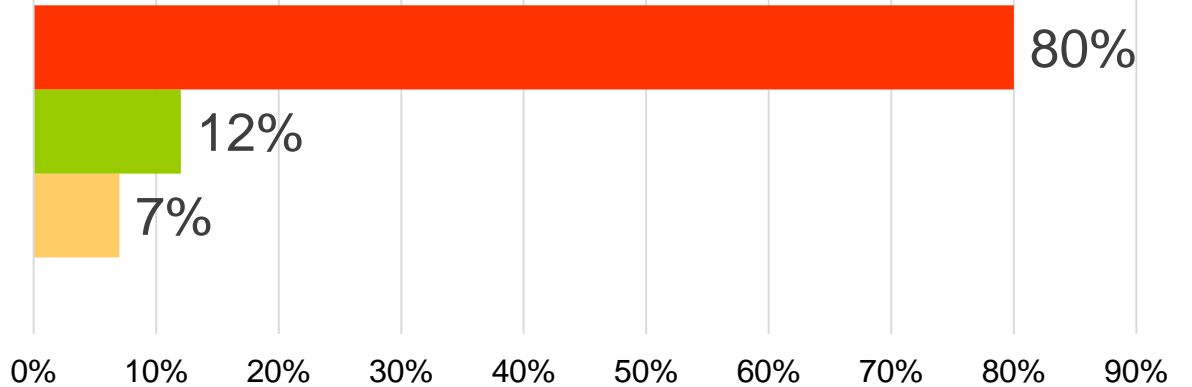
1

Difficulty in finding Workers

Finding quality year-round employees is becoming more difficult



Finding quality seasonal employees is becoming more difficult



■ Agree

■ Neither Agree/Disagree

■ Disagree

1

Tourism Business solutions



Pray
Training
Hire retirees
Higher wages
Hire J-1 workers
Use contractors
Provide benefits
Broader advertising

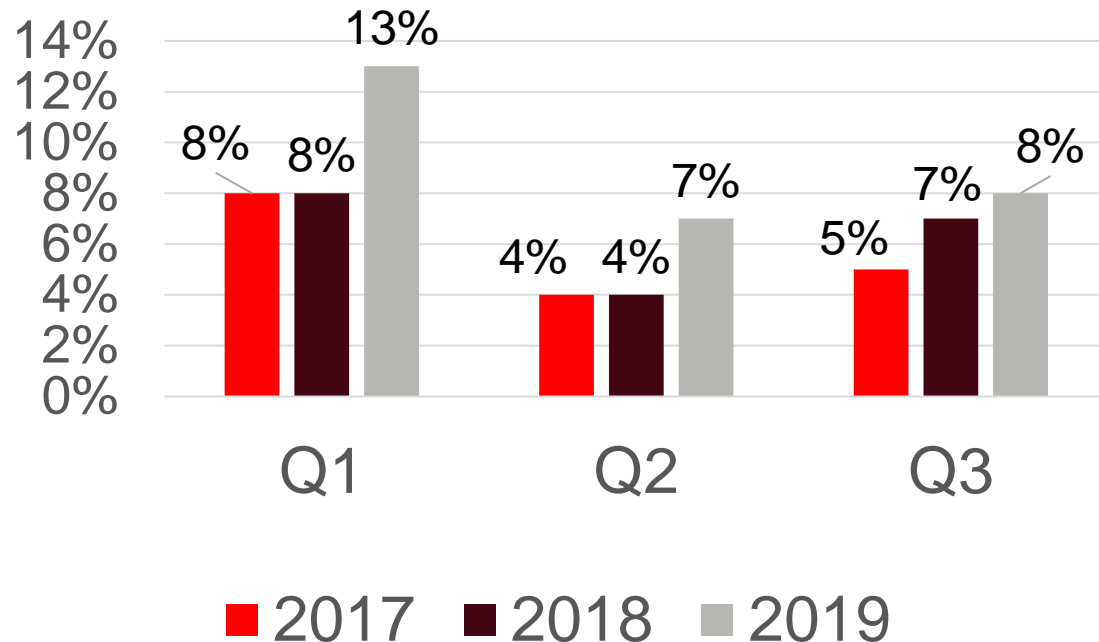


Keep business a sustainable size
Be a good employer – flexible start/end times

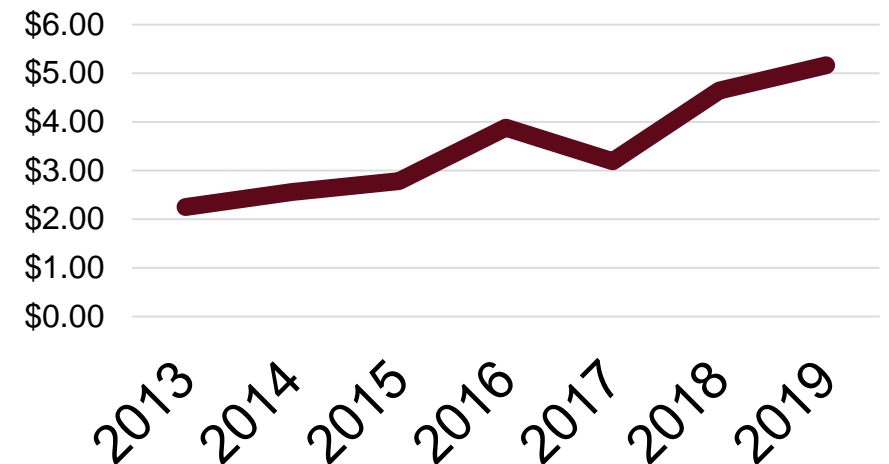
2

Short Term Rentals in Montana

Booked through Airbnb or VRBO



Average Spending by all Nonresident visitors on Rental Homes, Cabins, Condos



3 Aquatic Invasive Species (AIS)

**\$76.7 million in
revenue for fishing
outfitters**

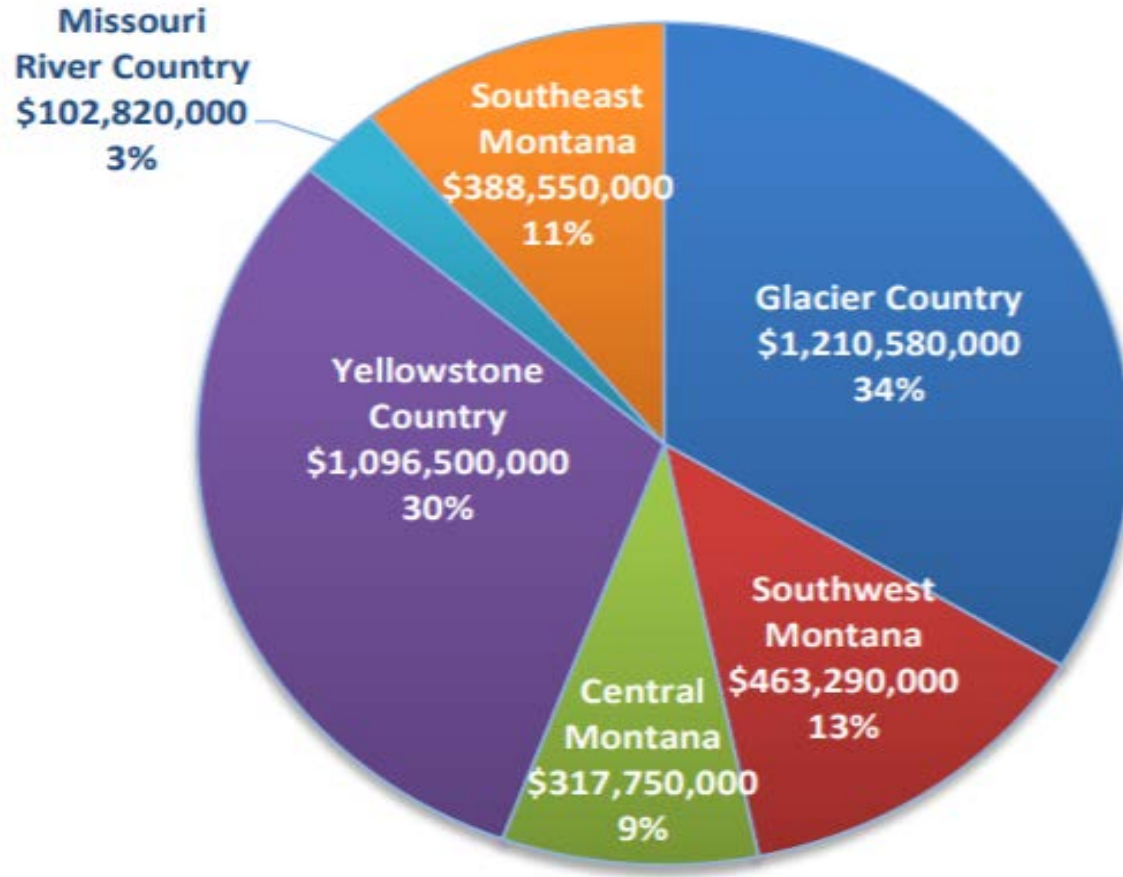


The environment, economy, recreation, tourism, and humans are all impacted by the introduction of aquatic invasive species.

4

Overcrowding vs Lagging Visitation

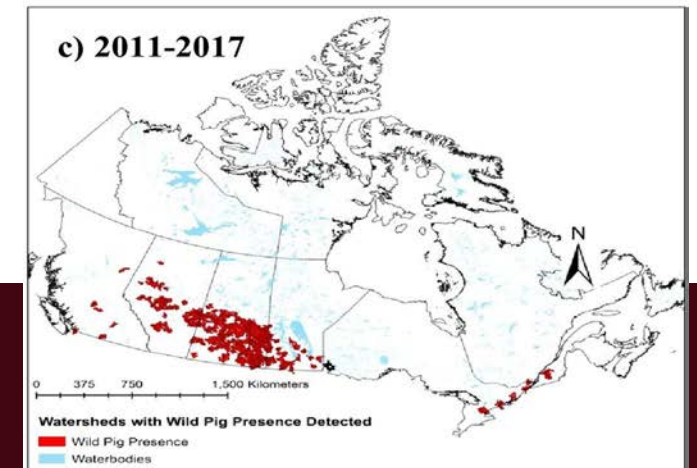
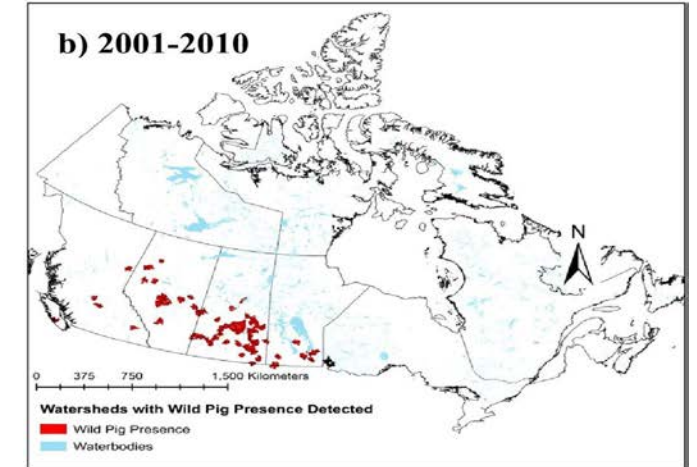
2018 Estimate of Nonresident Traveler Spending



64% of all non-resident spending is in the regions where Glacier & Yellowstone reside.

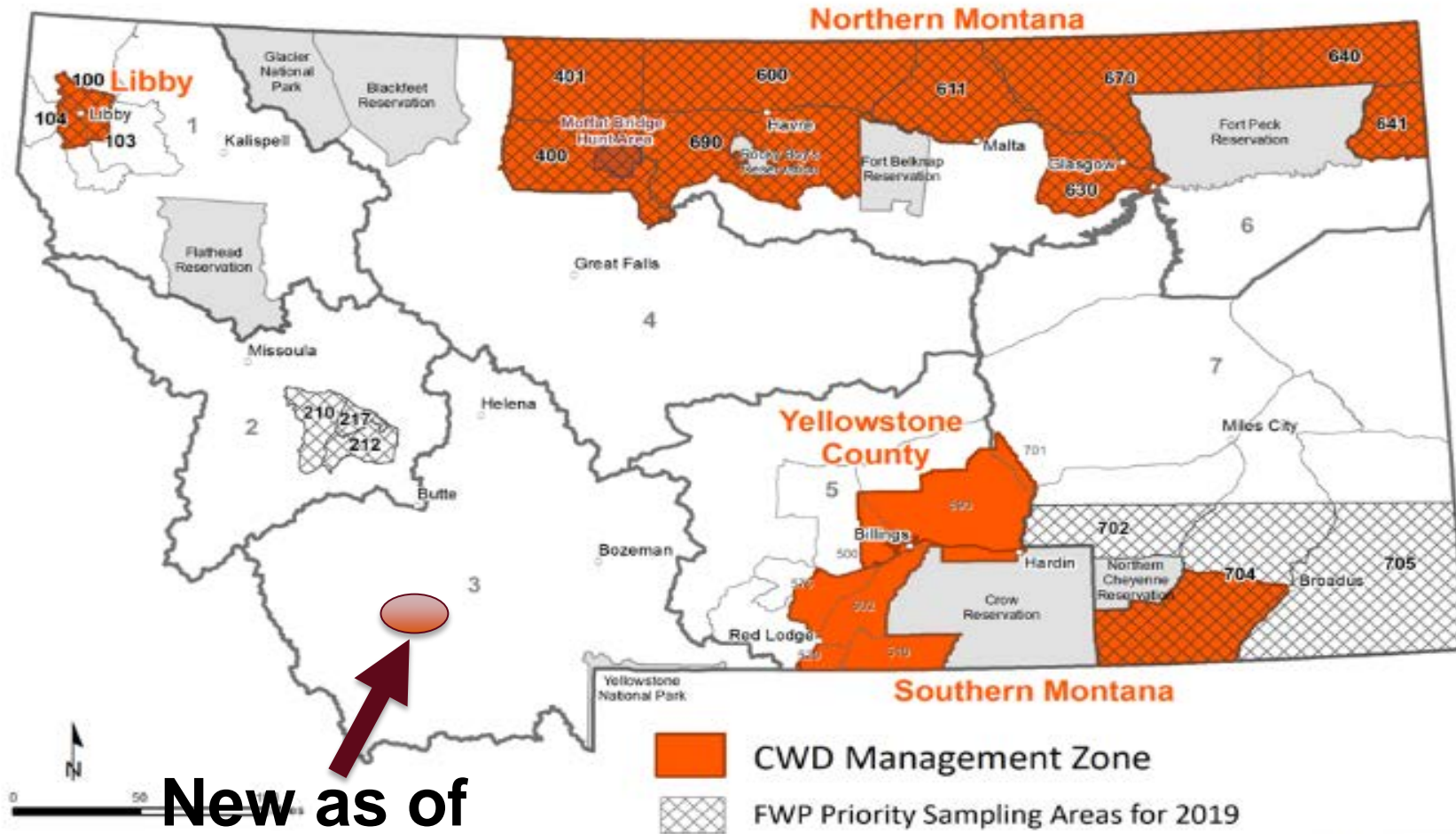
5

Feral Pigs are Coming



6

Chronic Wasting Disease Mgmt. Zones



**New as of
Dec. 2019**

Updated: 11/6/2019
MONTANA FWP

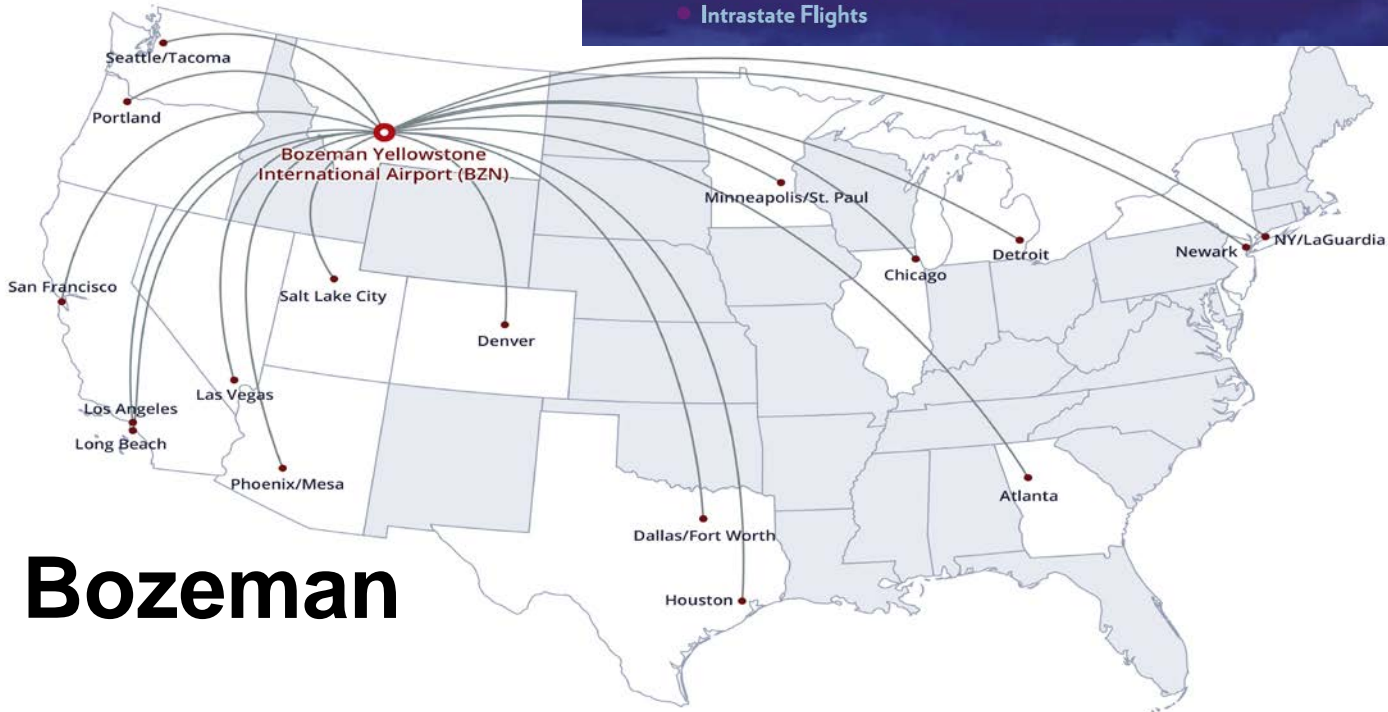
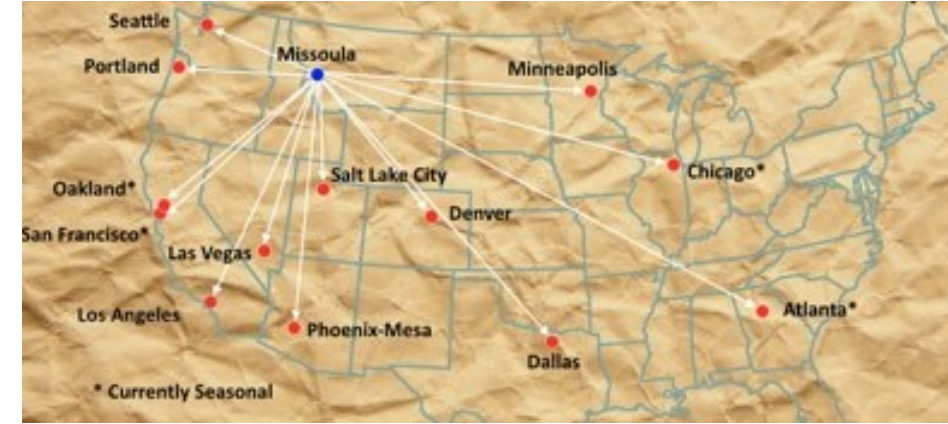
7

Airline Growth



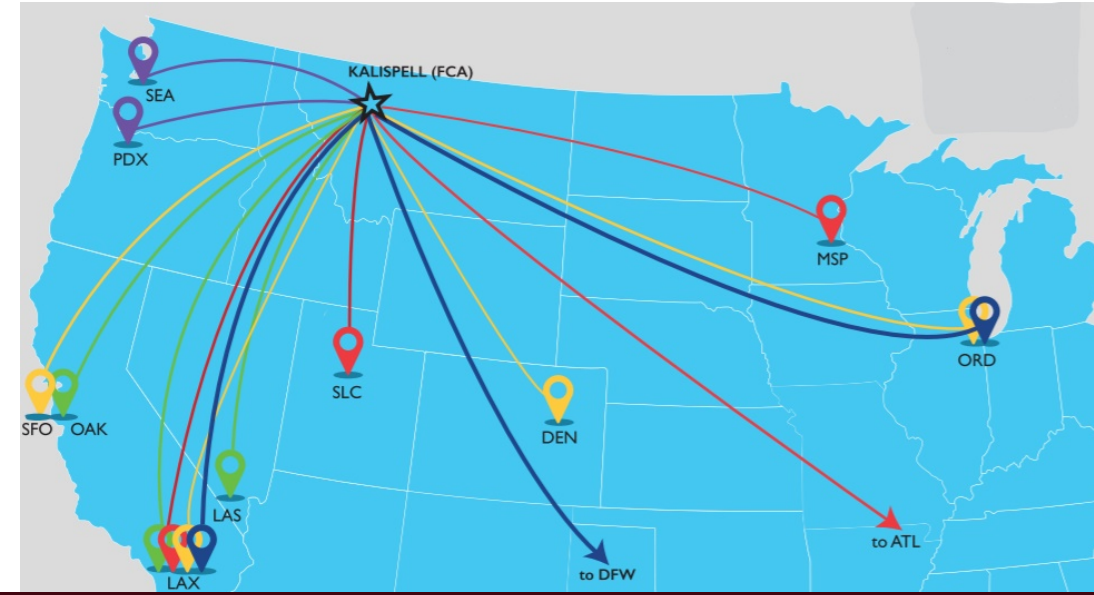
Billings

Missoula



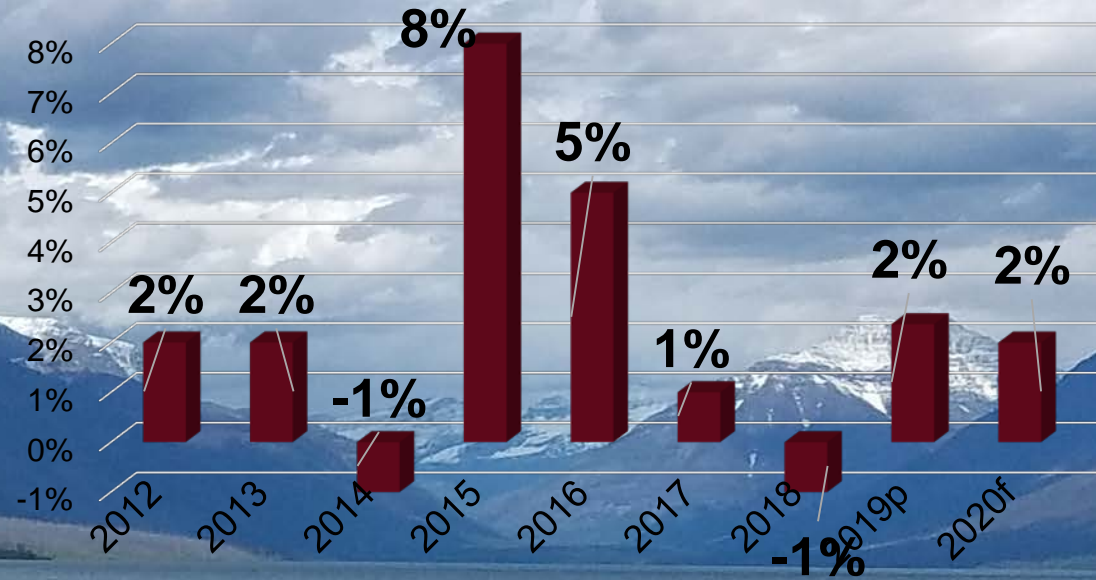
Bozeman

Kalispell

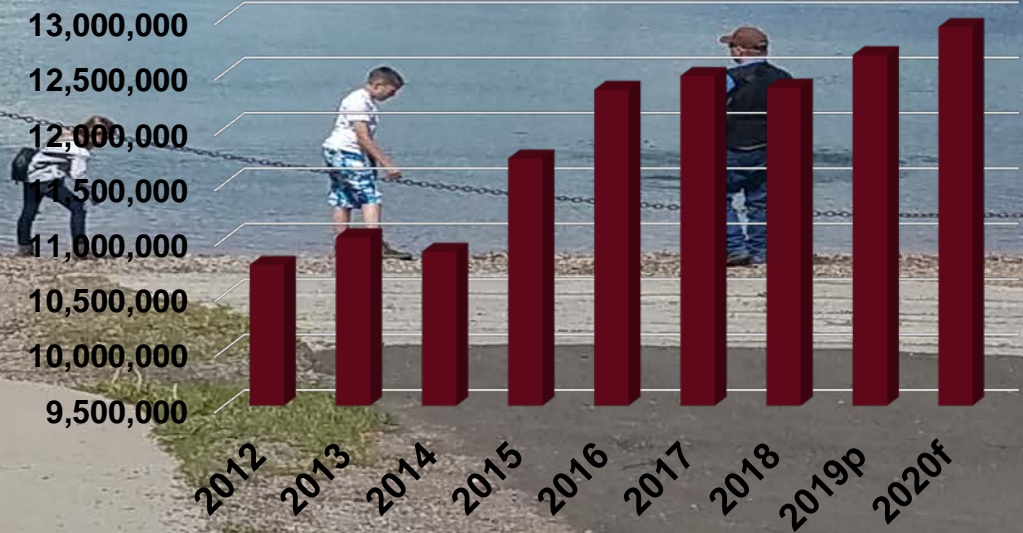


Nonresident Visitation

2% increase over 2018

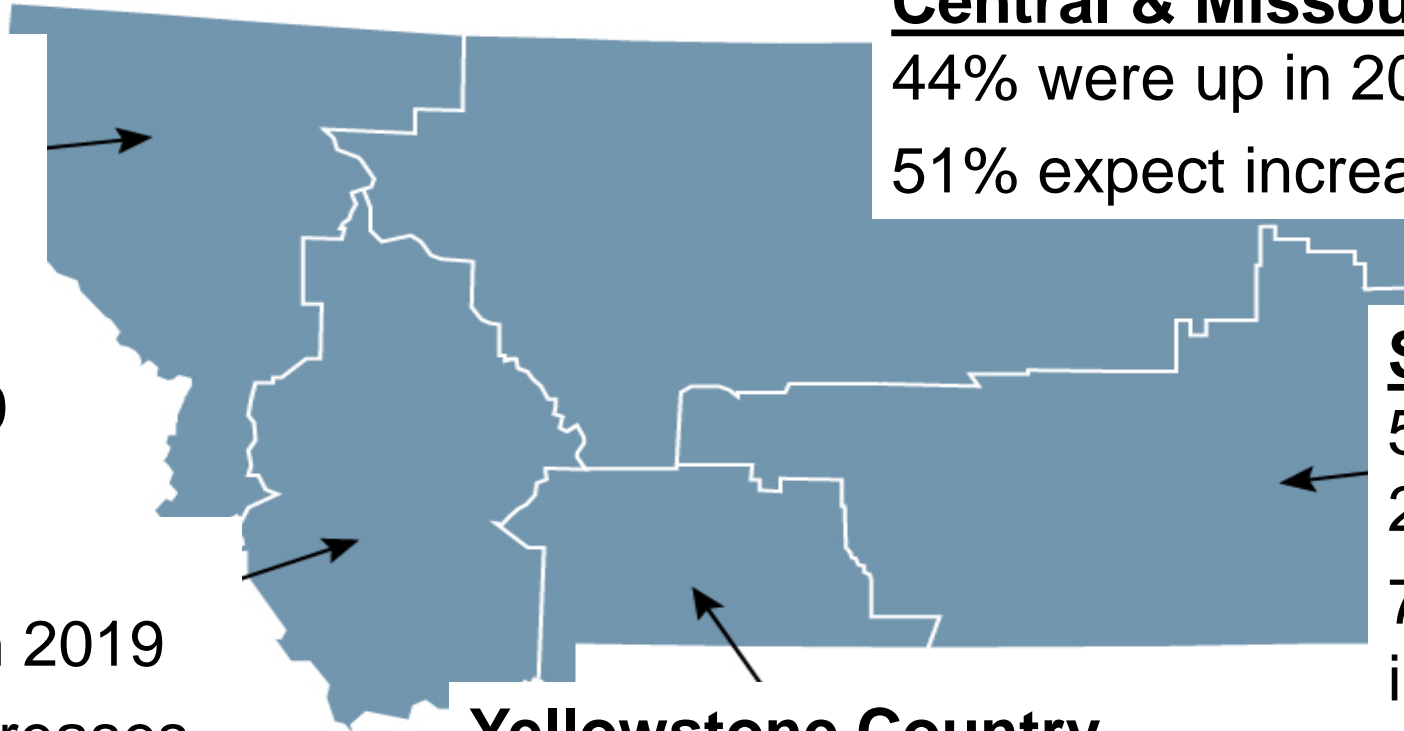


12.6 Million in 2019



Business Owners

2019 Increase; 2020 Expectations



Glacier Country

56% were up in 2019

61% expect increases in 2020

Central & Missouri River Regions

44% were up in 2019

51% expect increases in 2020

SW Montana

51% were up in 2019

67% expect increases in 2020

SE Montana

55% were up in 2019

78% expect increases in 2020

Yellowstone Country

50% were up in 2019

53% expect increases in 2020

Thank you!

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