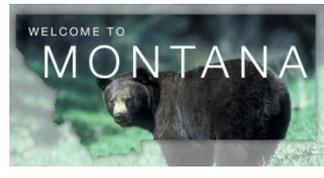




OUTLOOK TRENDS OBSERVATIONS

INSTITUTE FOR
TOURISM & RECREATION RESEARCH
UNIVERSITY OF MONTANA

Tourism & Recreation Outlook - *Megan Schultz*
Montana Tourism Trends – *Kara Grau*
Visitor & Surveyor Observations – *Norma Nickerson*



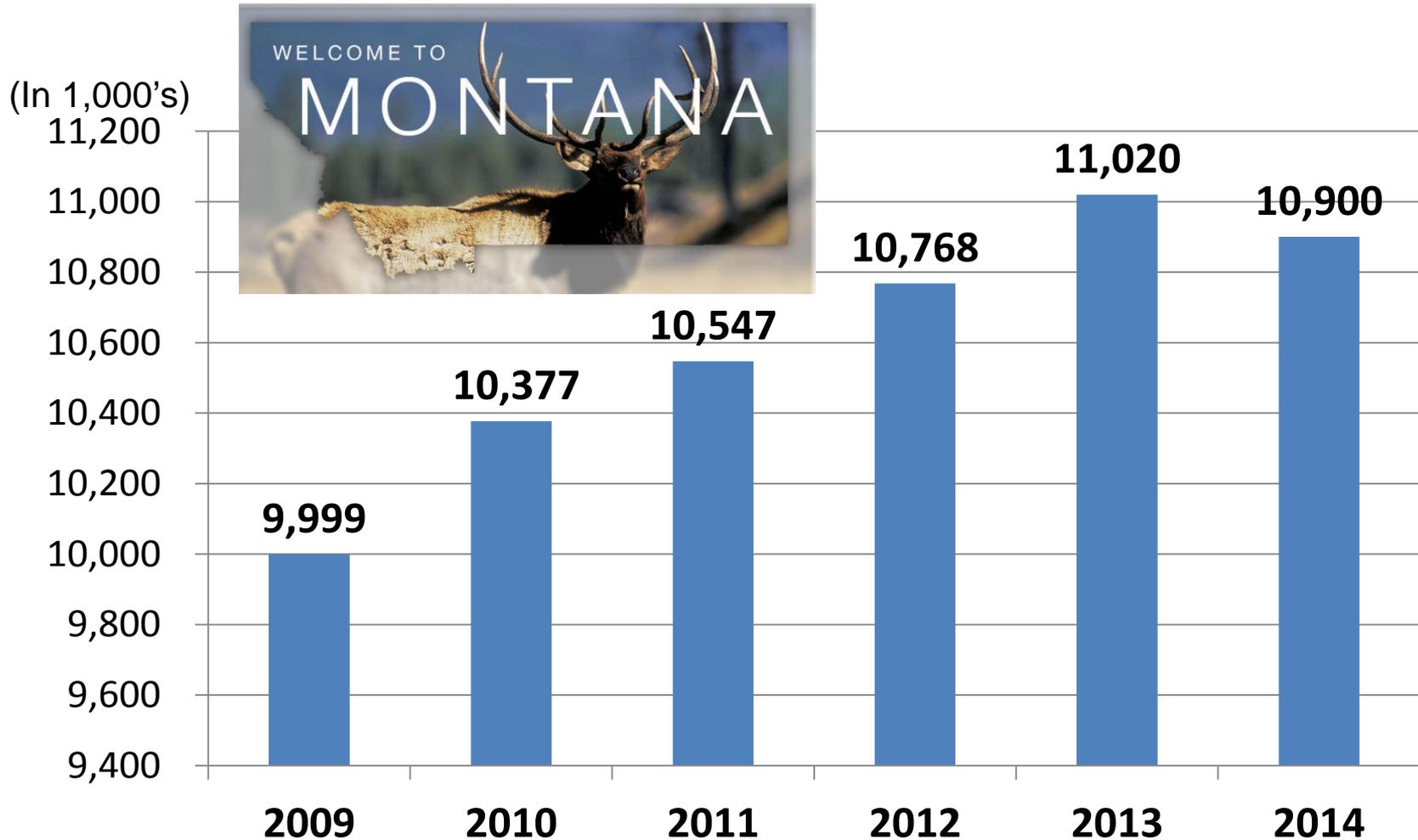
Tourism & Recreation Outlook

Megan Schultz

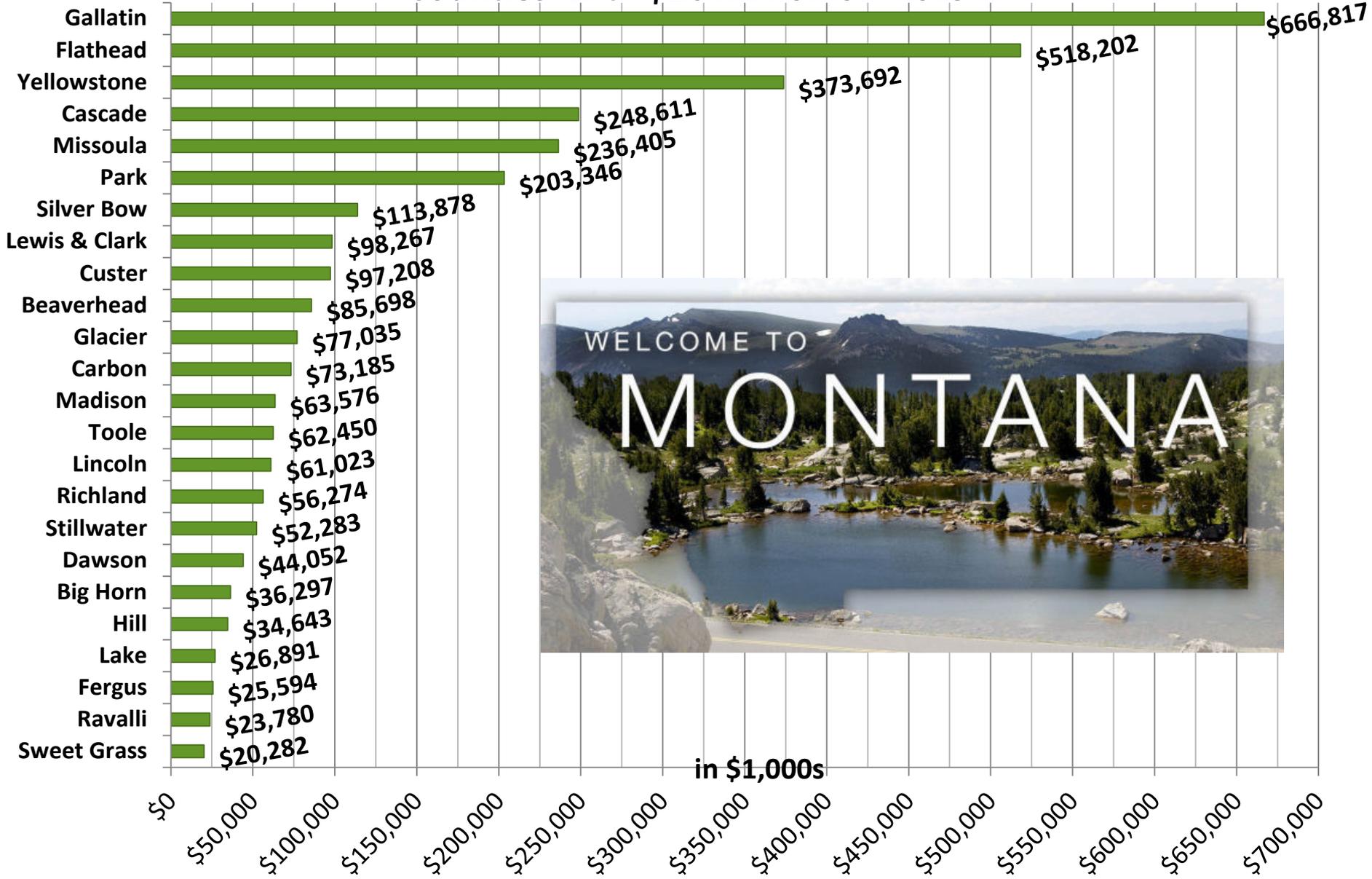
INSTITUTE FOR
TOURISM & RECREATION RESEARCH
UNIVERSITY OF MONTANA



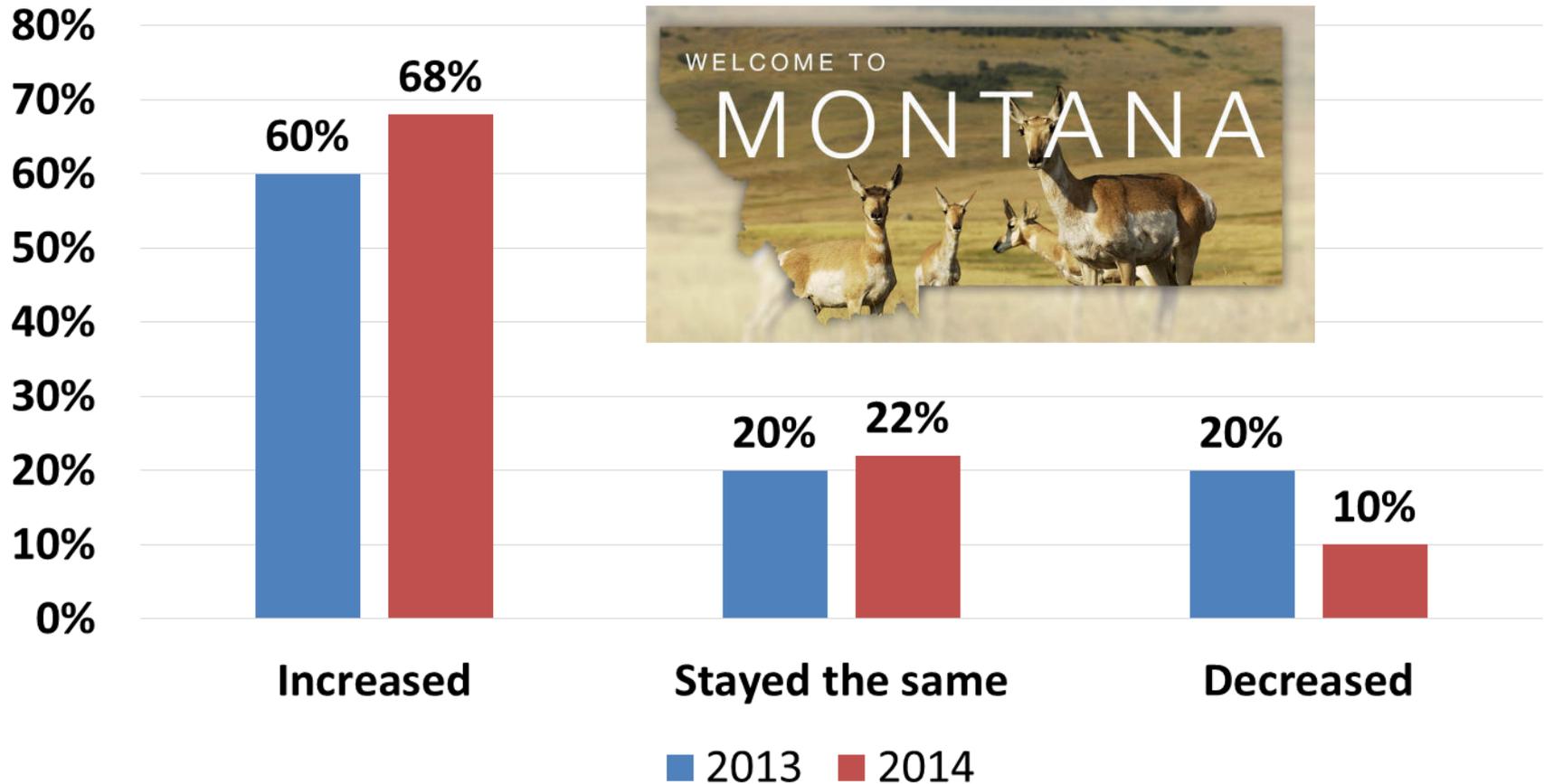
Nonresident Visitation to MT



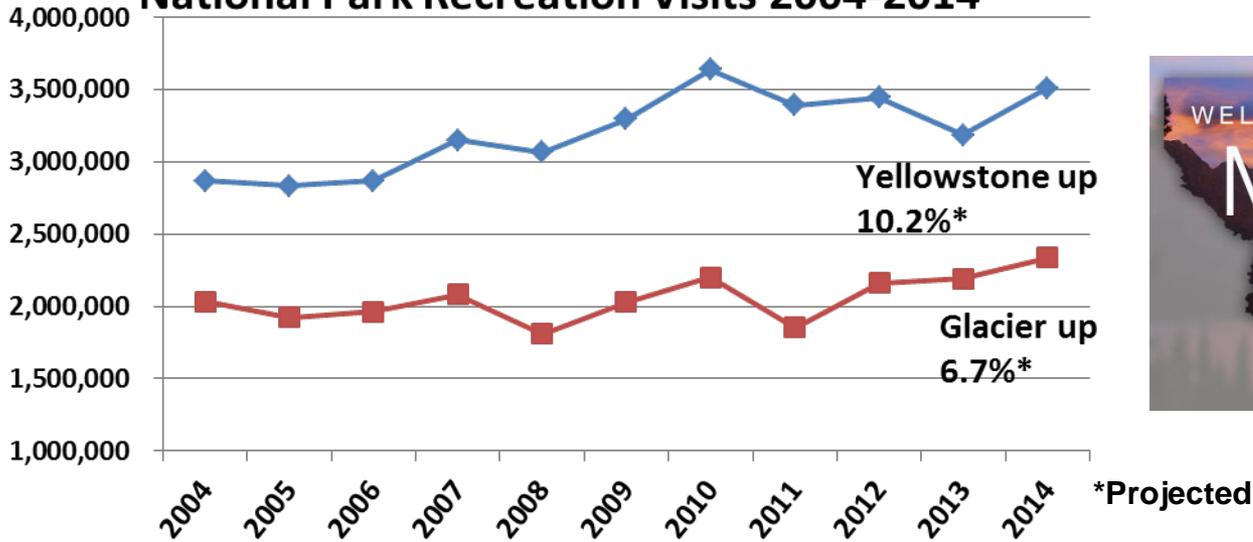
2012-2013 Estimate of Nonresident Traveler Spending per County: Counties with \$20 million or more



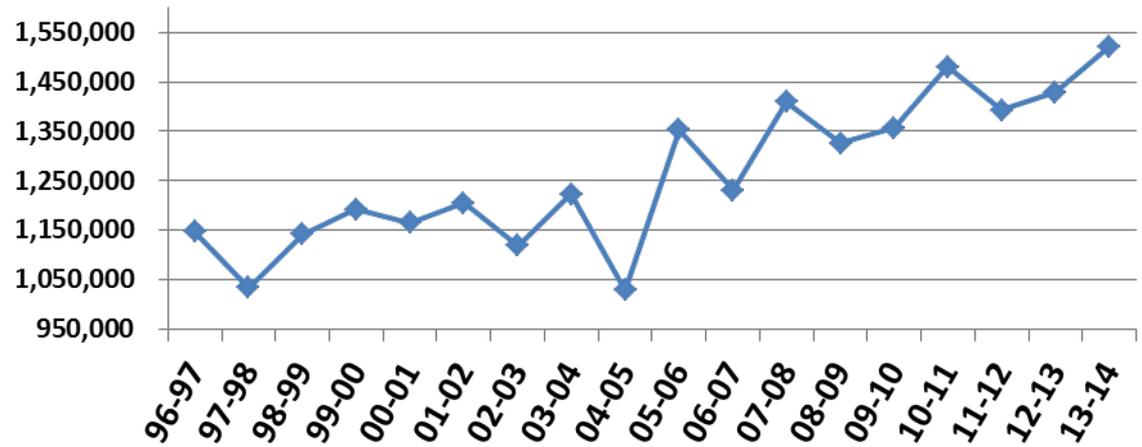
Tourism Business Owners: Customer % change 2013-2014



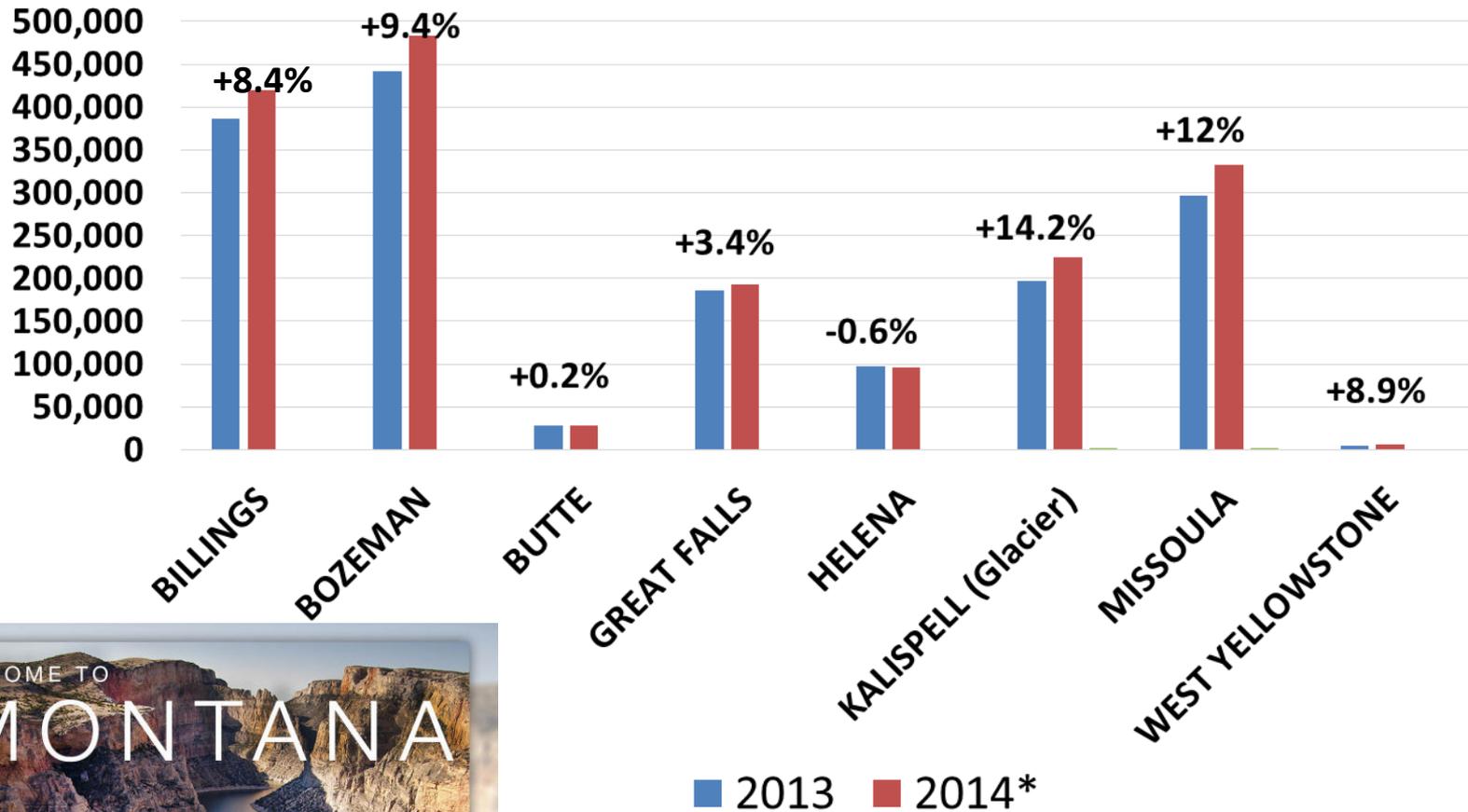
National Park Recreation Visits 2004-2014



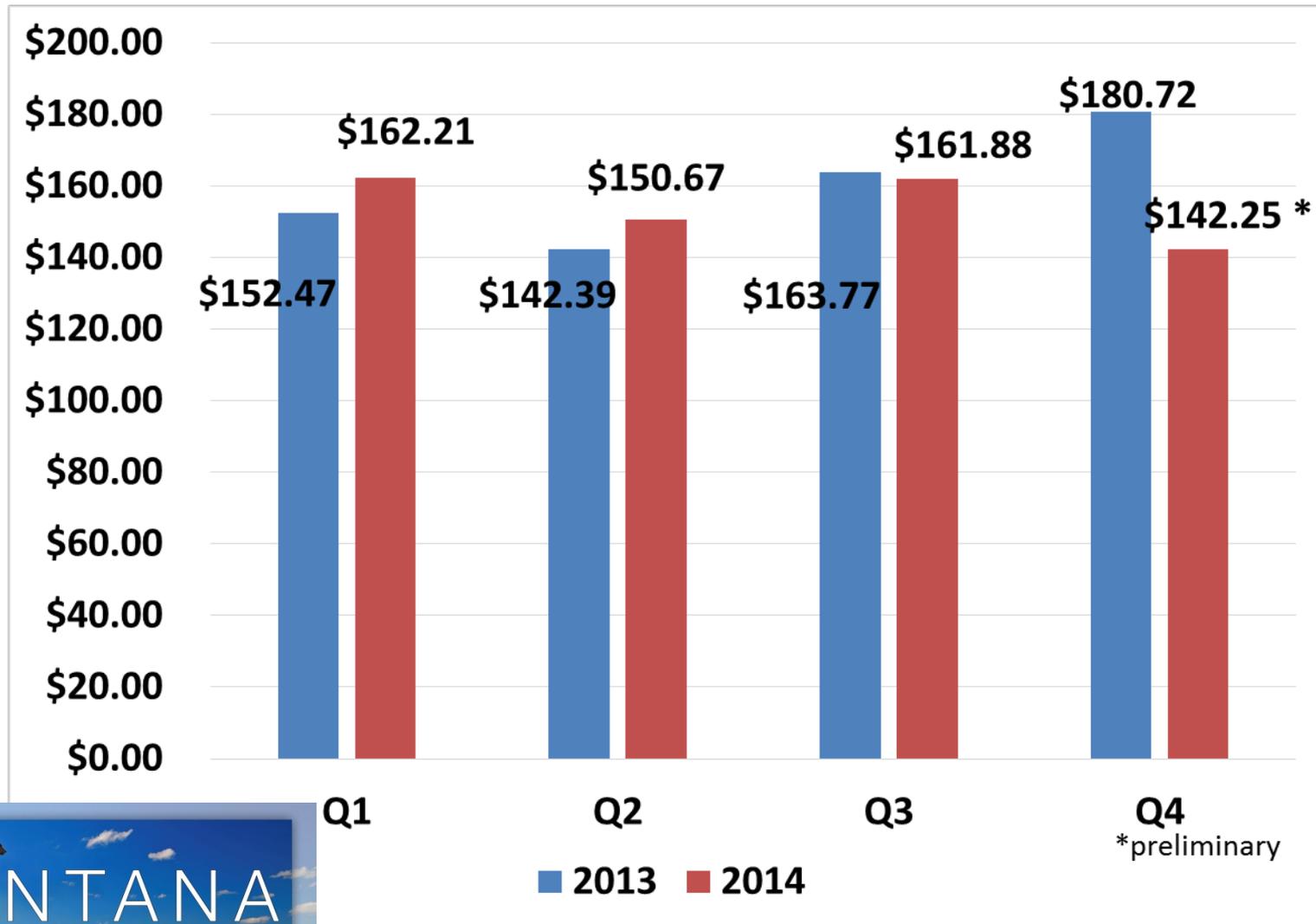
Montana Ski Area Visits 1996-2014



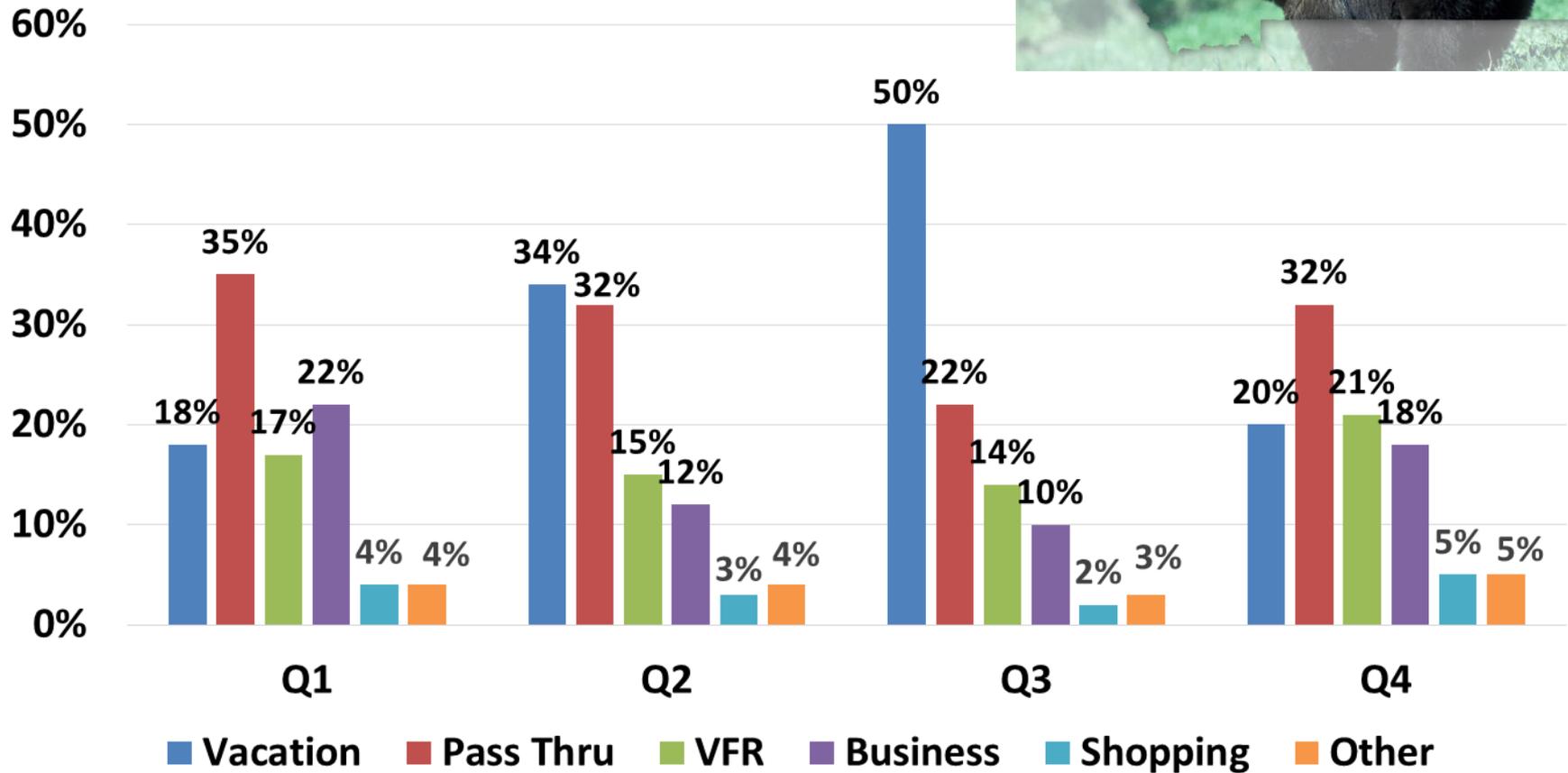
Airport Deboardings Change by City: 2013-14*



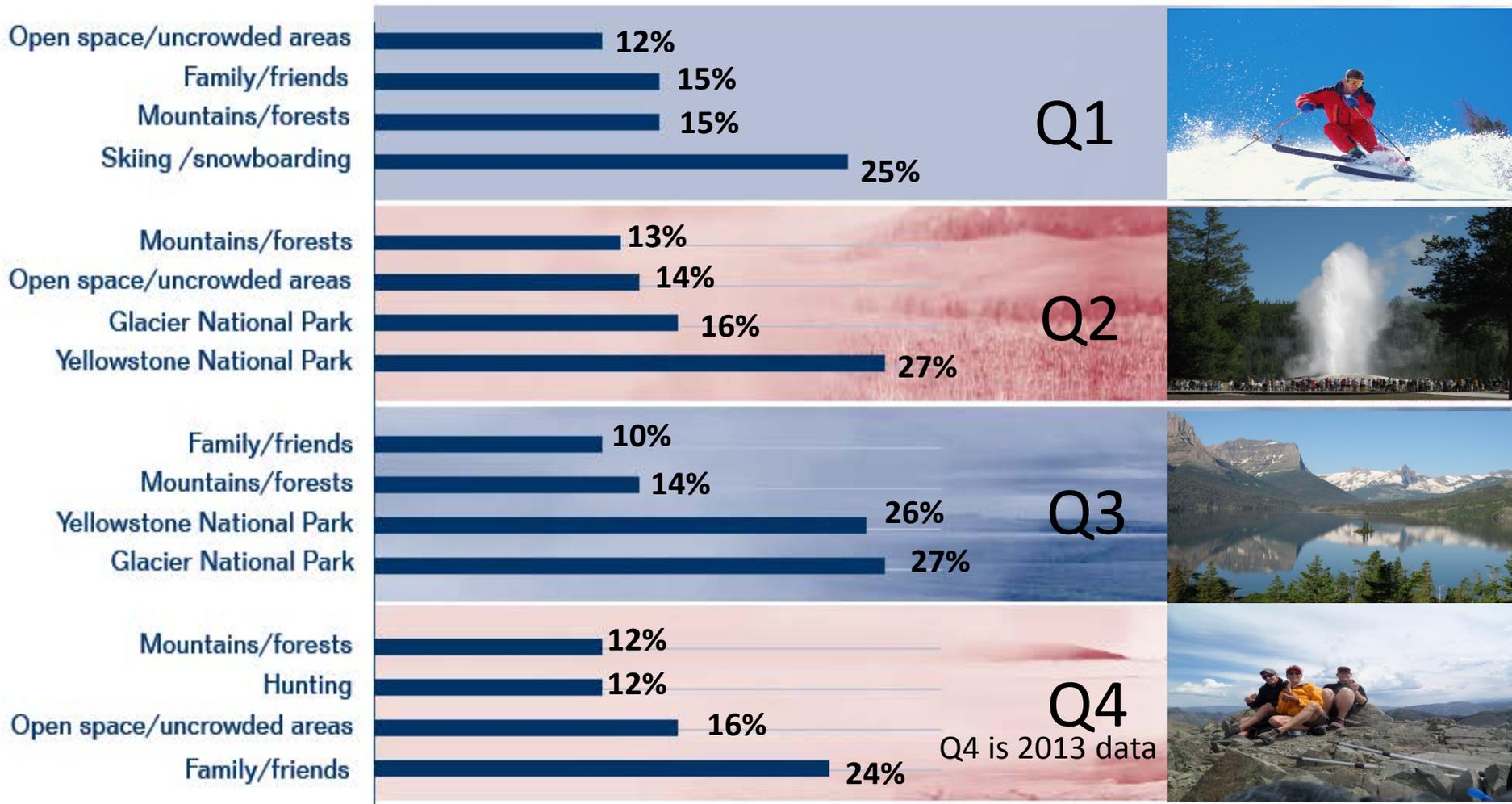
Quarterly Nonresident Spending



Primary Purpose of Visit by Quarter 2014



Top 4 Primary Attractions by Quarter, 2014



Promising Outlook for 2015 because...

- Household spending (up)
- Unemployment (down)
- Household debt (down)
- US dollar (stronger)
- Intention to travel (up)



Montana 2015 Outlook

- Expect nonresident visitation to be up 2%
- Expect nonresident spending to be up 2%-5%
- Economic impact to MT should be greater than \$5 billion.



Montana Tourism Trends

Kara Grau



Trends in...



Activities

- Overall top activities
- Snowshoeing
- Skiing
- RV camping
- Dinosaur Trail
- Mt. biking
- Hunting



Additional trends

- Overall attractions
- Travel group size
- Length of Stay



3-year trend - Activities

Activities in MT on This Trip

2014	2013	2012
65% Scenic driving	64% Scenic driving	67% Scenic driving
38% Day hiking	36% Day hiking	40% Wildlife watching
37% Nature photography	36% Wildlife watching	39% Nature photography
37% Wildlife watching	35% Nature photography	37% Day hiking
33% Recreational shopping	32% Recreational shopping	30% Recreational shopping
25% Car / RV camping	25% Car / RV camping	28% Car / RV camping
22% Visiting other historical sites	21% Visiting other historical sites	25% Visiting other historical sites
16% Visiting museums	15% Visiting museums	17% Visiting museums
12% Visiting Lewis & Clark sites	10% Fishing / fly fishing	13% Visiting Lewis & Clark sites
12% Fishing / fly fishing	9% Attending festivals or events	13% Fishing / fly fishing
9% Attending festivals or events	9% Visiting Lewis & Clark sites	10% Attending festivals or events

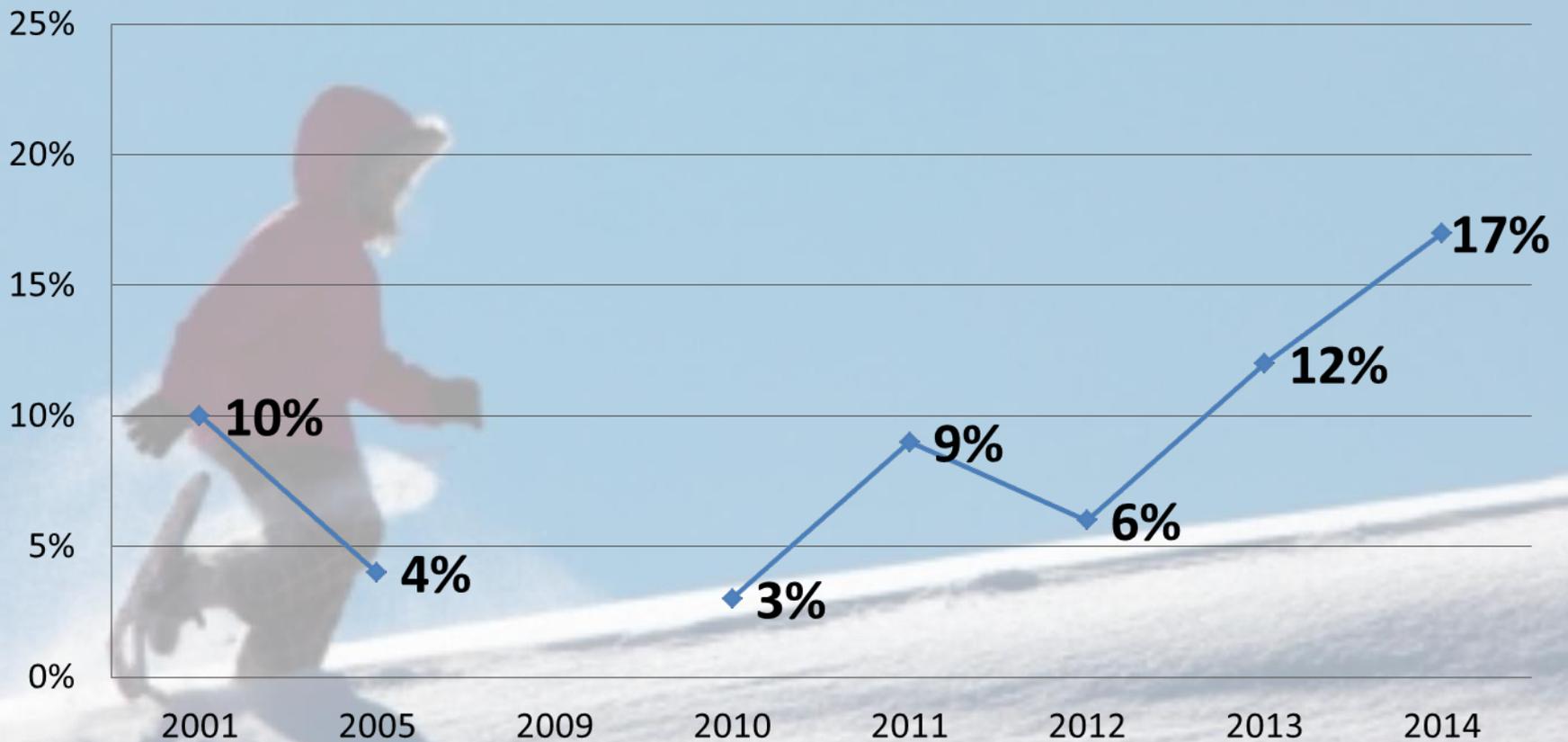
Several activities added to survey in 2015:

- **Rock climbing**
- **Motorcycle touring**
- **Bicycling** (road/tour cycling & mountain biking already on survey)
- **Attend wedding**

It will be interesting to see these activity trends in a few years!

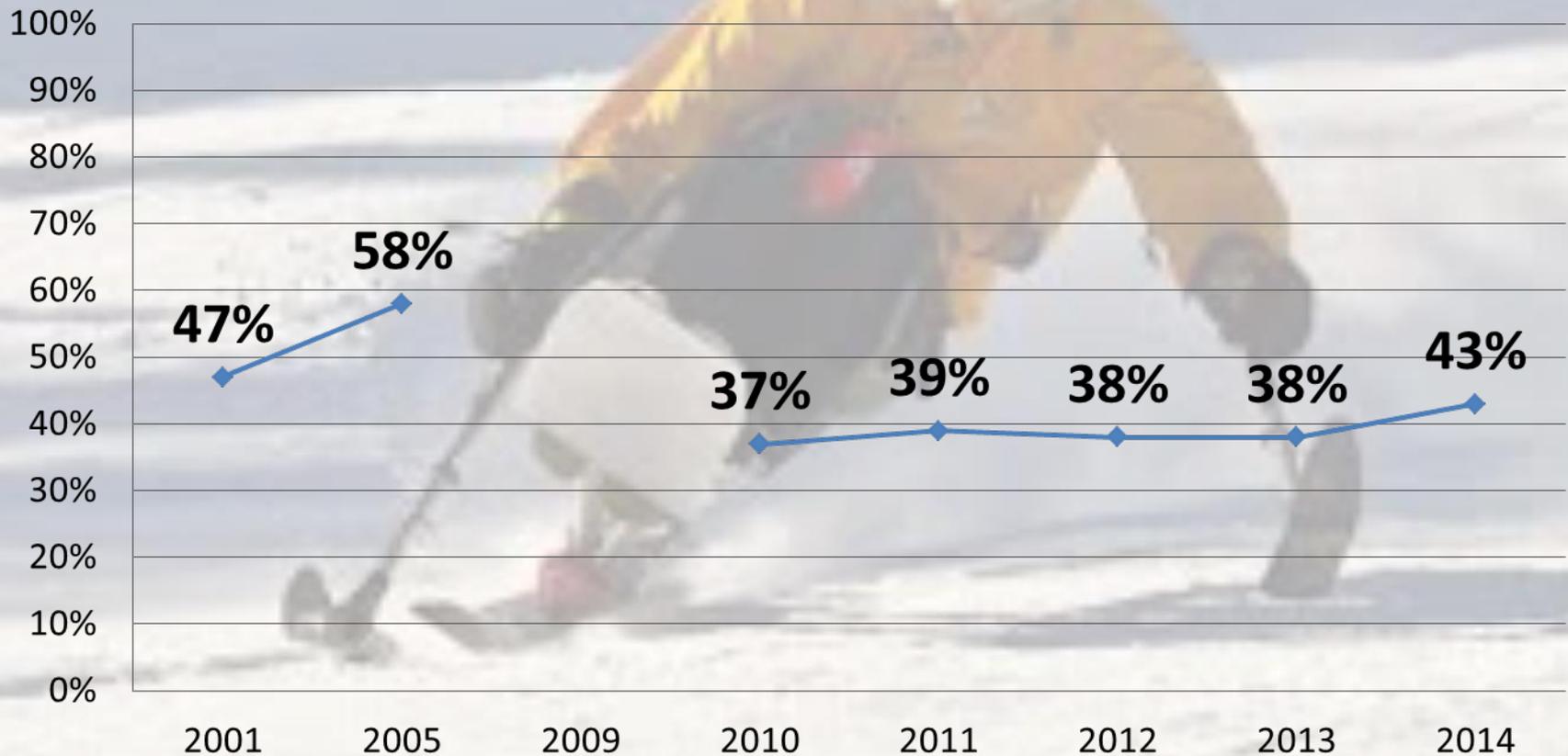
Snowshoeing

Snowshoeing Q1 - Vacationers



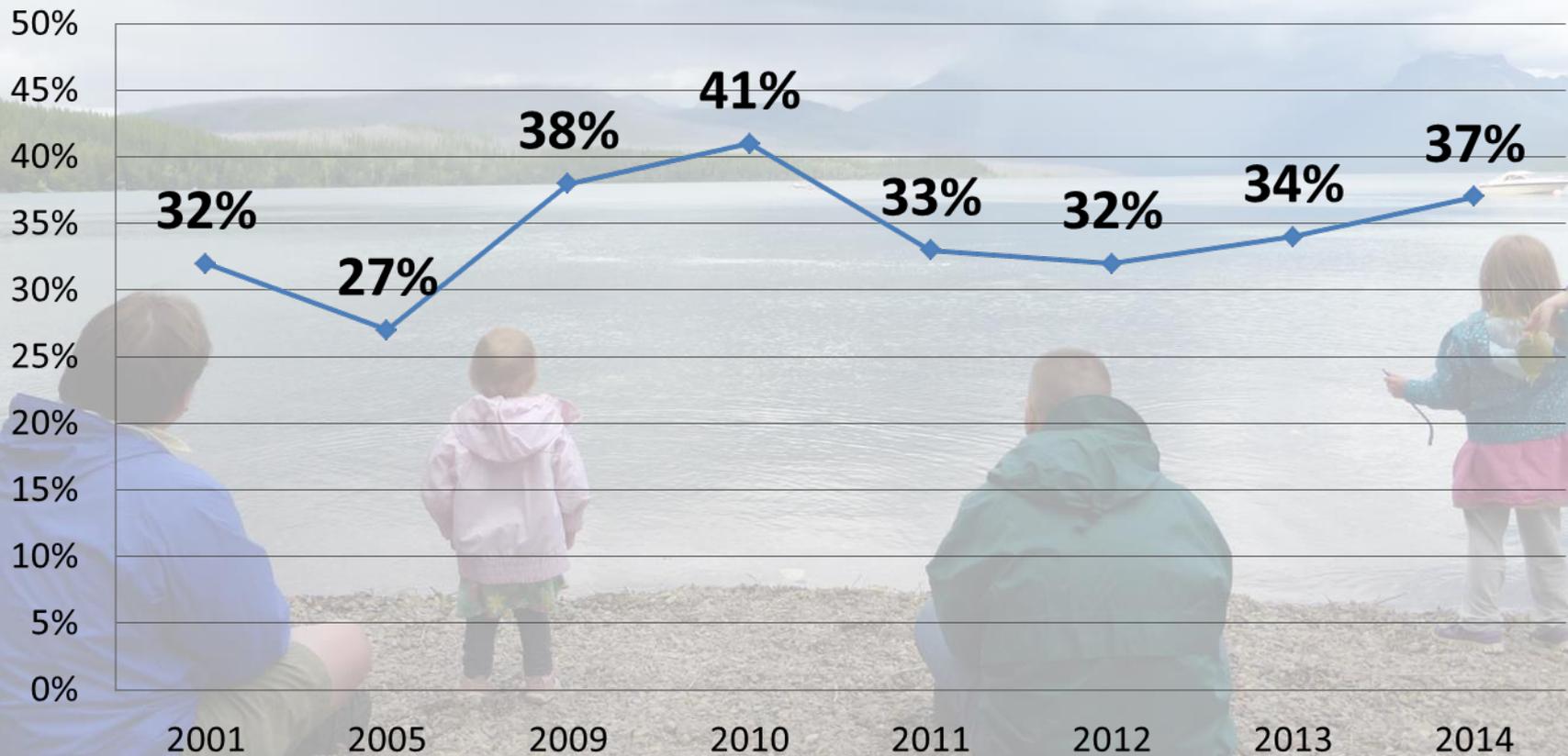
Skiing/Snowboarding

Skiing/Snowboarding Q1 - Vacationers



Car/RV camping

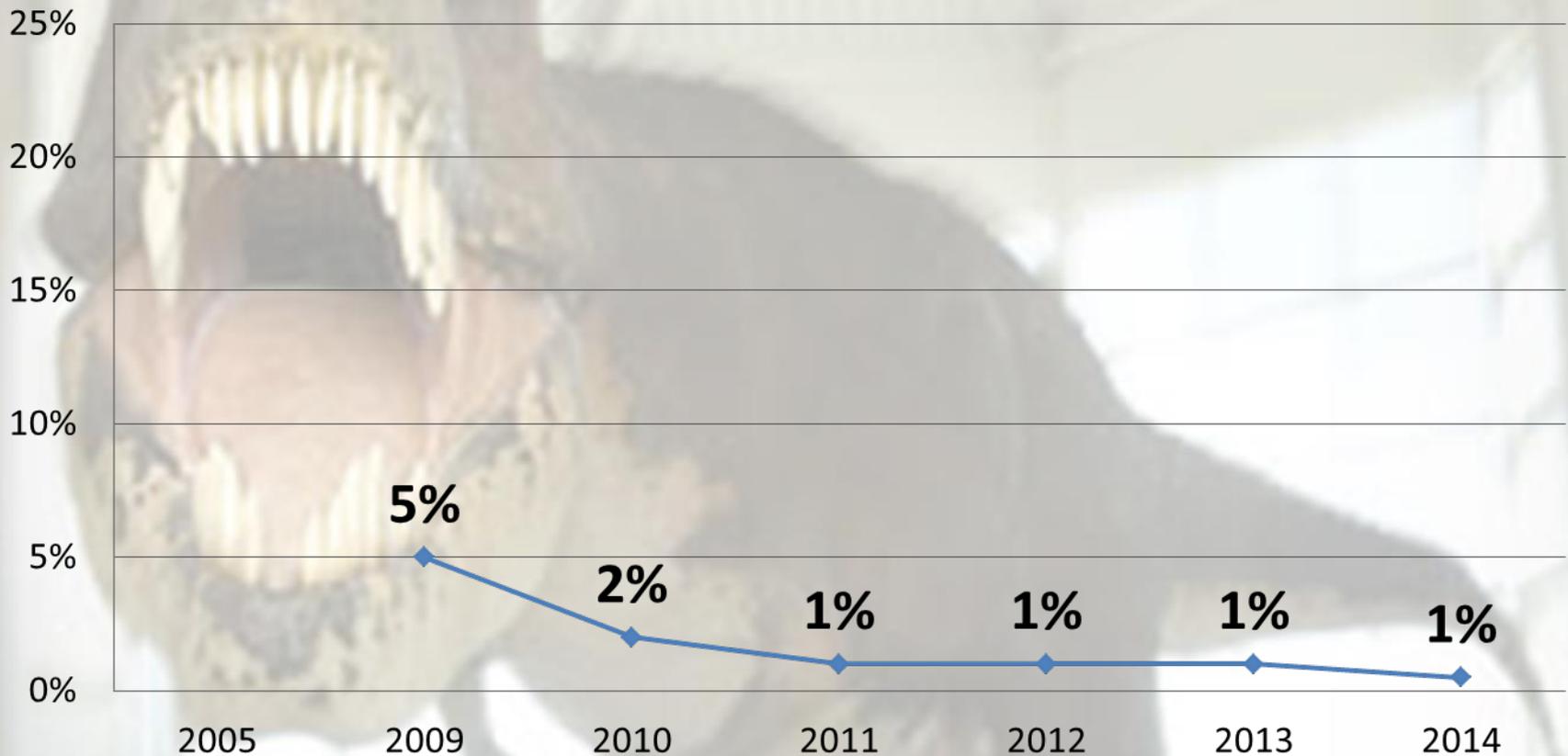
Car RV Camping Q3 - Vacationers



Follow Dinosaur Trail

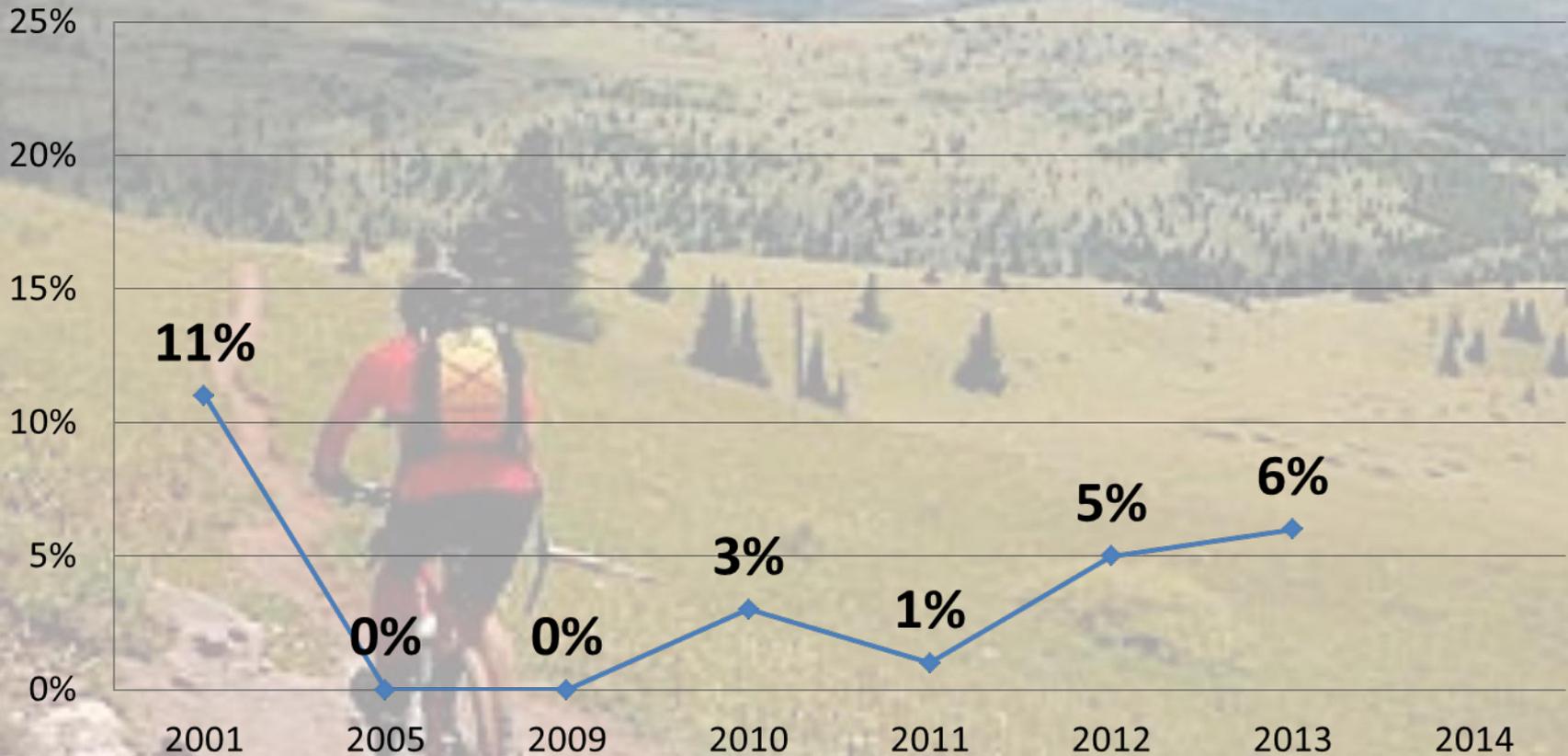
(changed to “Dinosaur attractions” in 2015)

Follow Dinosaur Trail Q3 - Vacationers



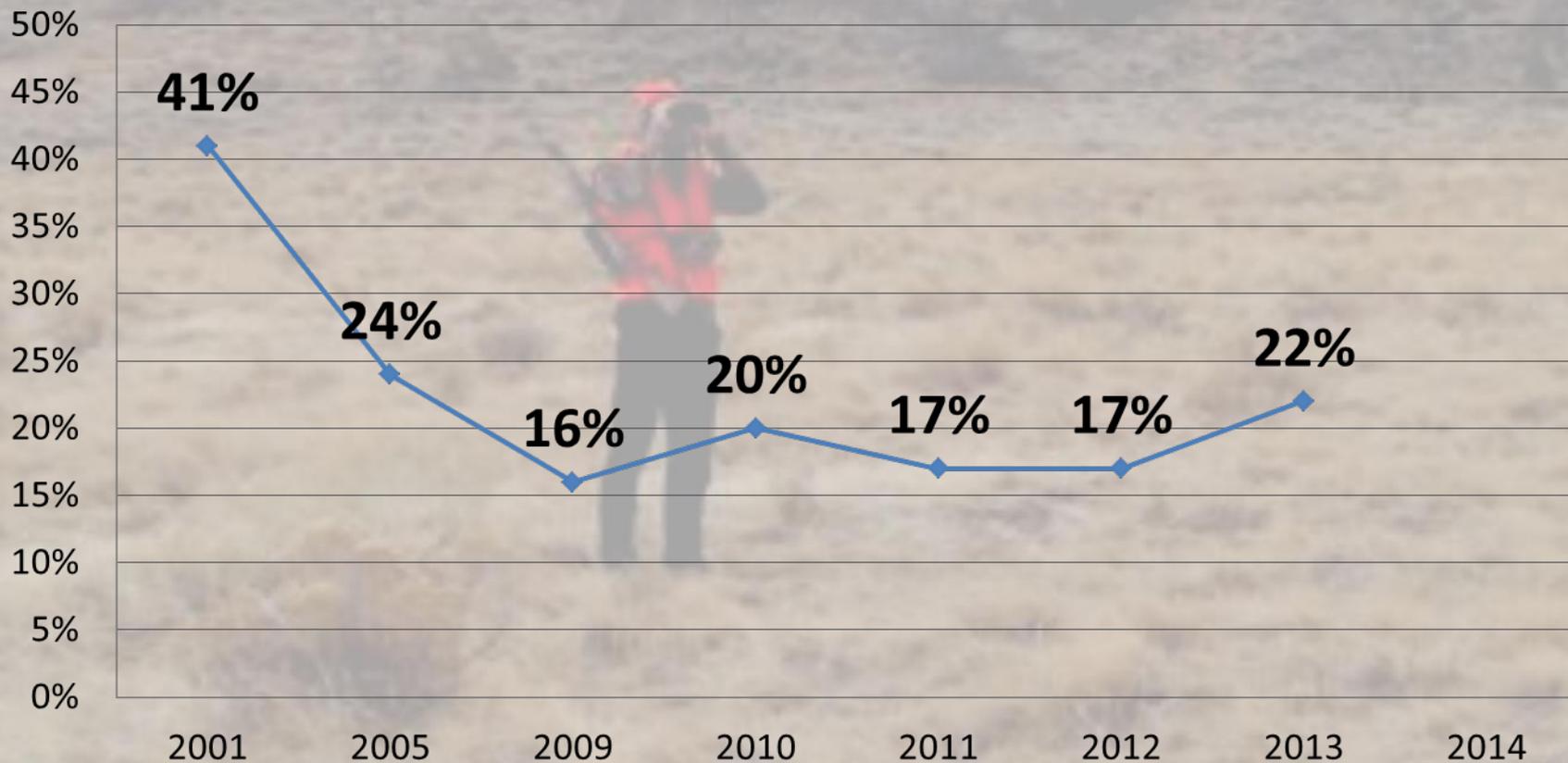
Mountain Biking

Mountain Biking Q4 - Vacationers



Hunting

Hunting Q4 - Vacationers

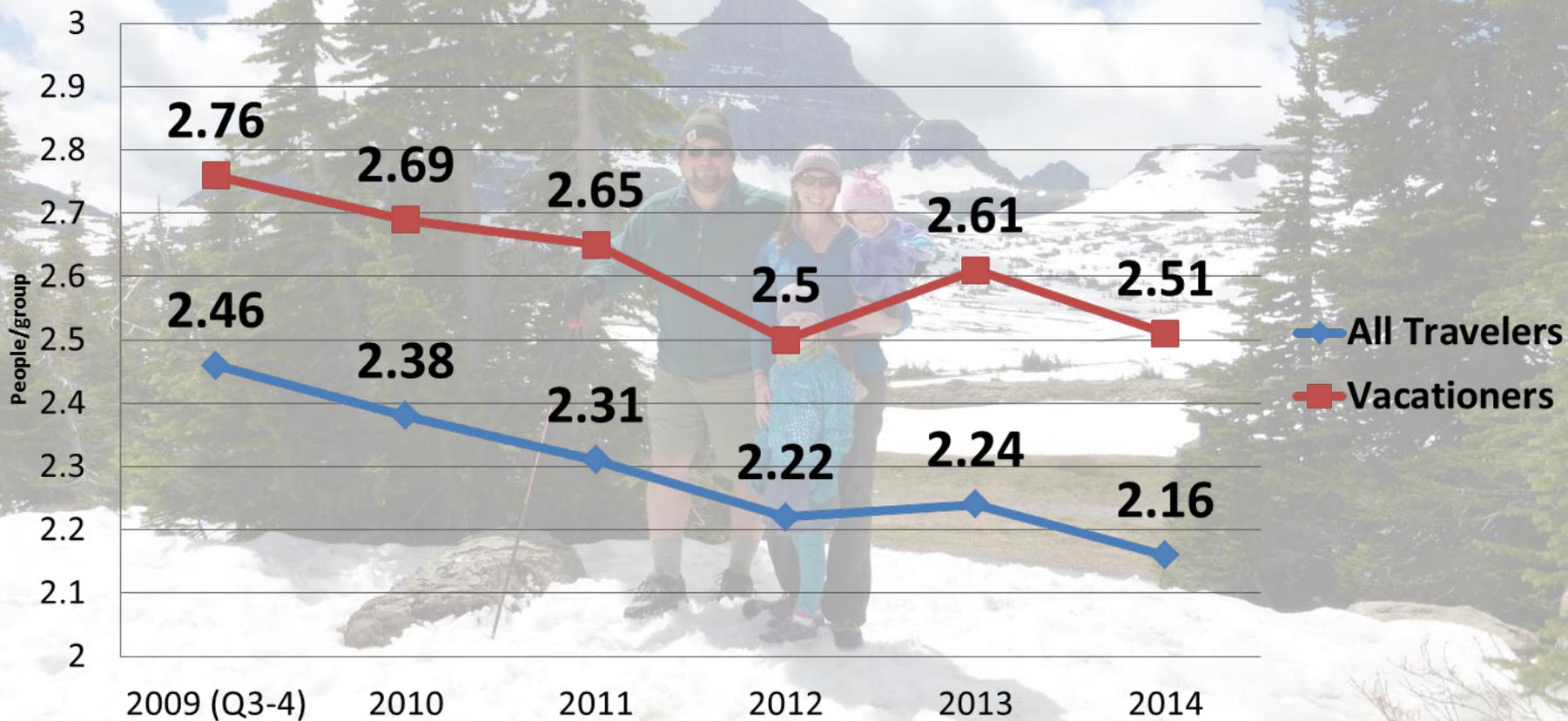


3-year trend - Attractions

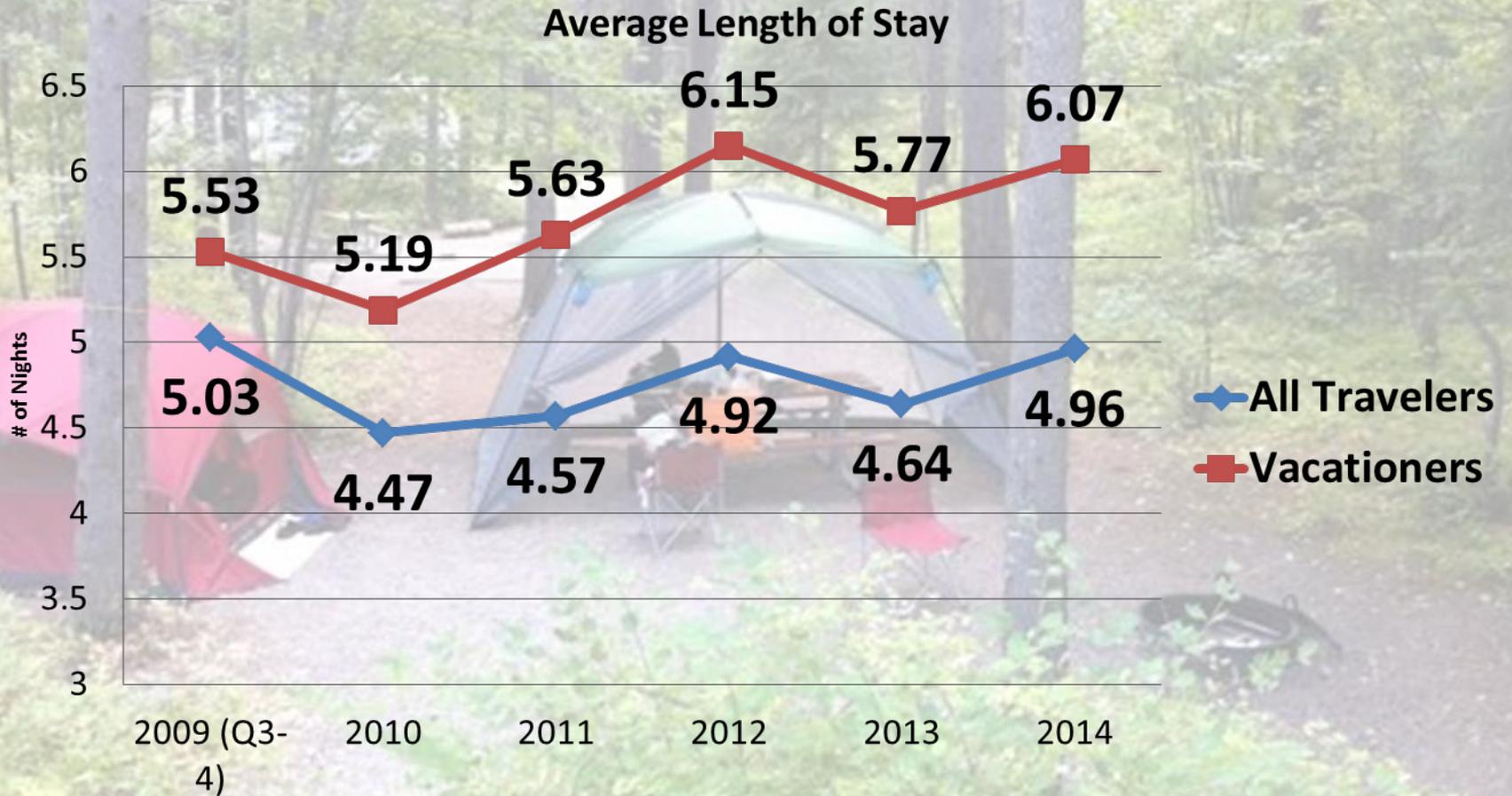
2014		2013		2012	
Mountains / forests	66%	Mountains / forests	66%	Mountains / forests	66%
Open space / uncrowded areas	51%	Open space / uncrowded areas	52%	Yellowstone National Park	53%
Yellowstone National Park	48%	Yellowstone National Park	50%	Open space / uncrowded areas	53%
Rivers	46%	Rivers	45%	Rivers	46%
Glacier National Park	39%	Glacier National Park	37%	Wildlife	36%
Wildlife	35%	Wildlife	35%	Glacier National Park	35%
Lakes	34%	Lakes	34%	Lakes	30%
Family/friends	26%	Family/friends	31%	Family/friends	27%
Fishing	16%	Fishing	17%	Fishing	17%
Lewis & Clark history	15%	Lewis & Clark history	12%	Lewis & Clark history	16%
Native American history & culture	12%	Native American history & culture	12%	Other Montana history & culture	15%
Other Montana history & culture	11%	Other Montana history & culture	11%	Native American history & culture	14%

Group Size

Average Group Size



Length of Stay



Visitor and Surveyor Comments

Norma Nickerson

Visitor Comments/Observations

- Positive statements
- I visited _____ (fill in the blank)
- Beautiful
- We come here a lot!
- I will be back...would like to move here
- National park visited
- Friendly people
- I'm just passing through
- Wildlife

And then, some summarize it all...

MT was marvelous! We loved the diversity of the areas we saw. The scenery and wildlife sightings were awesome, the people were friendly and the accommodations were comfortable. Our visit far exceeded our expectations. The Red Bus tours in Glacier were excellent! Wow!! America The Beautiful must have been written about your state.

However, nobody is perfect

Luckily less than 2% of the comments are negative.



Cell coverage
High hotel costs
Casinos
Rest areas
Bad service
Recycling
Border crossing

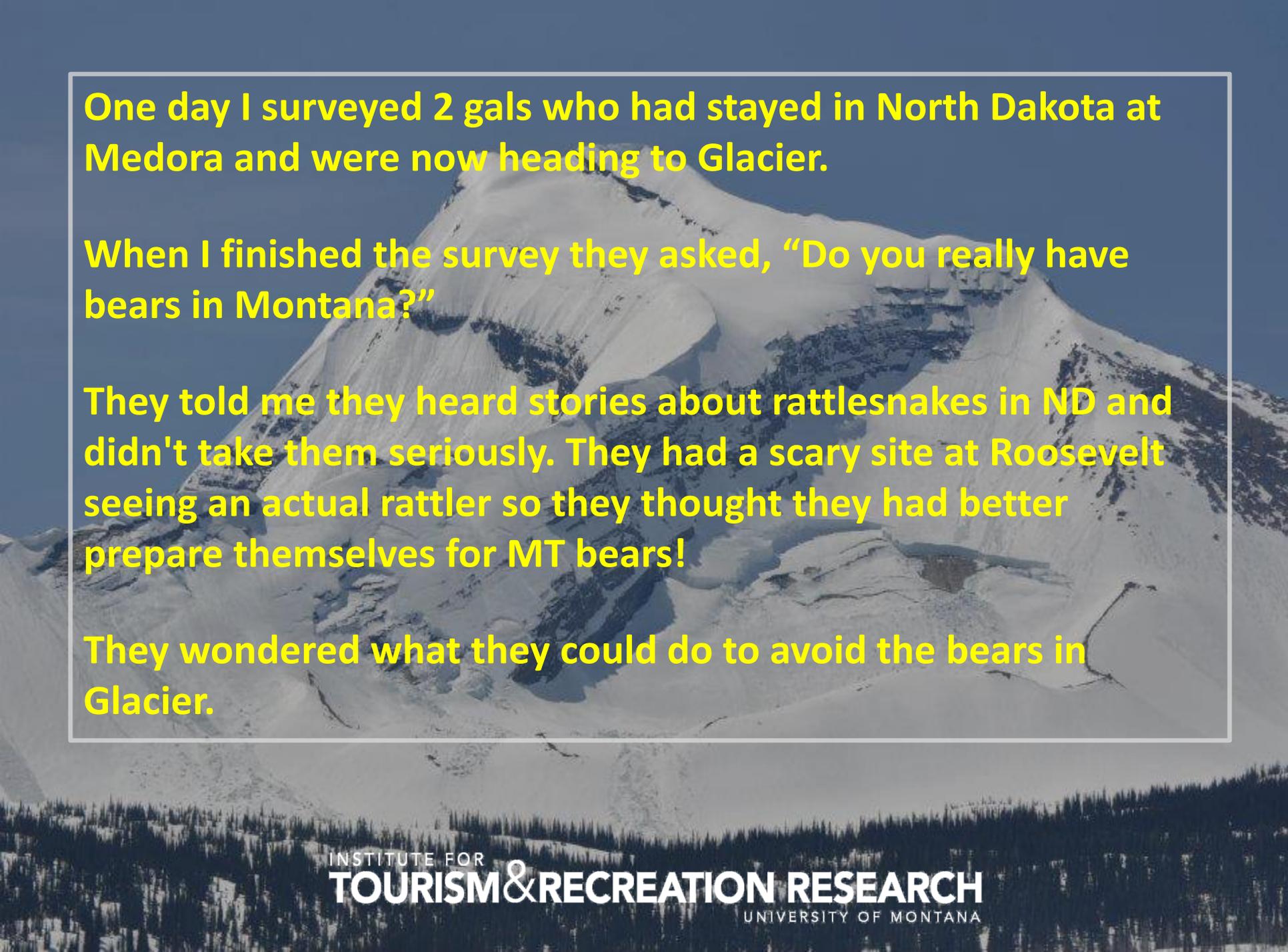


Income question on survey
Cost of hunting tags, no wildlife



Surveyor Observations



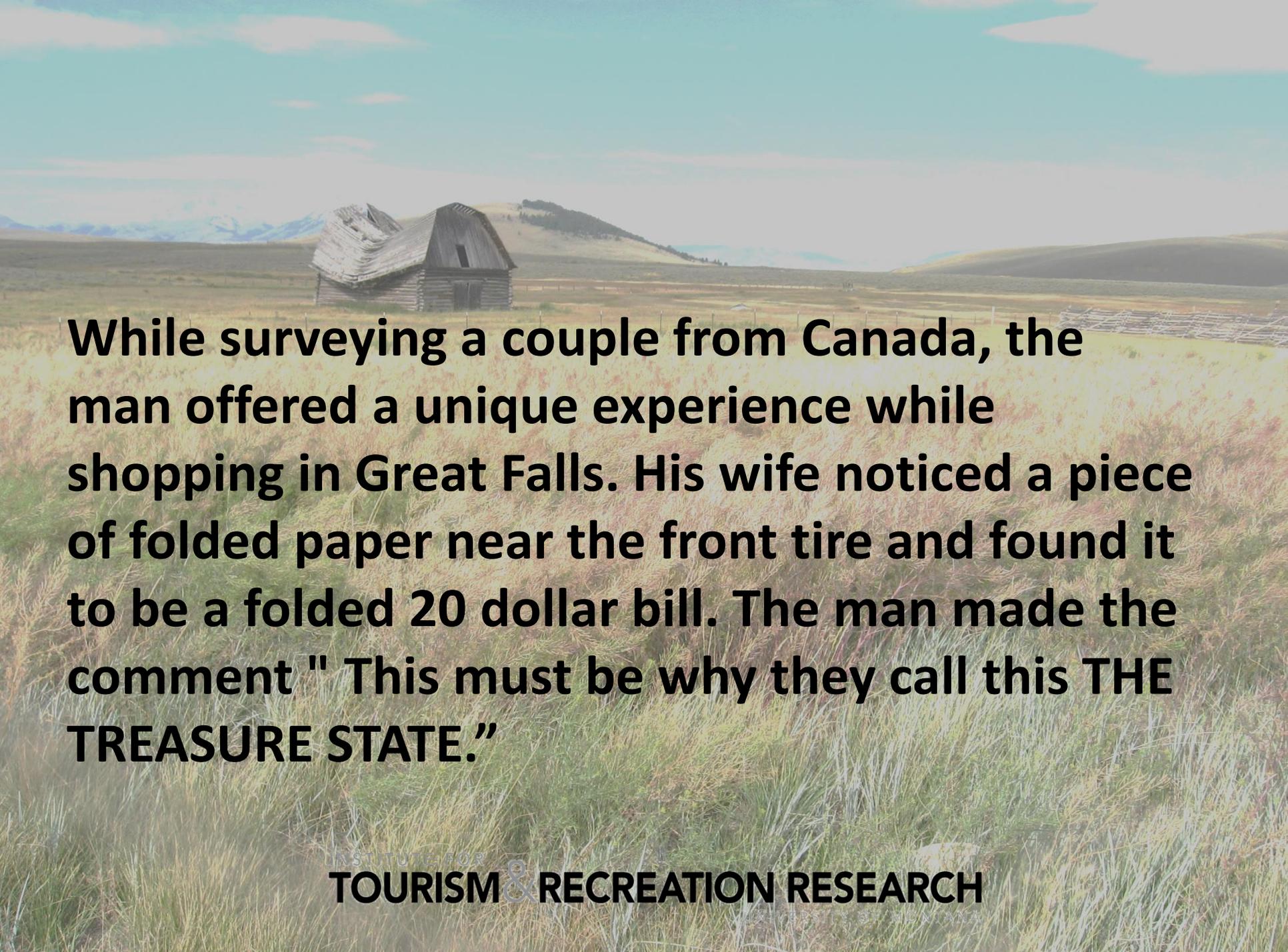


One day I surveyed 2 gals who had stayed in North Dakota at Medora and were now heading to Glacier.

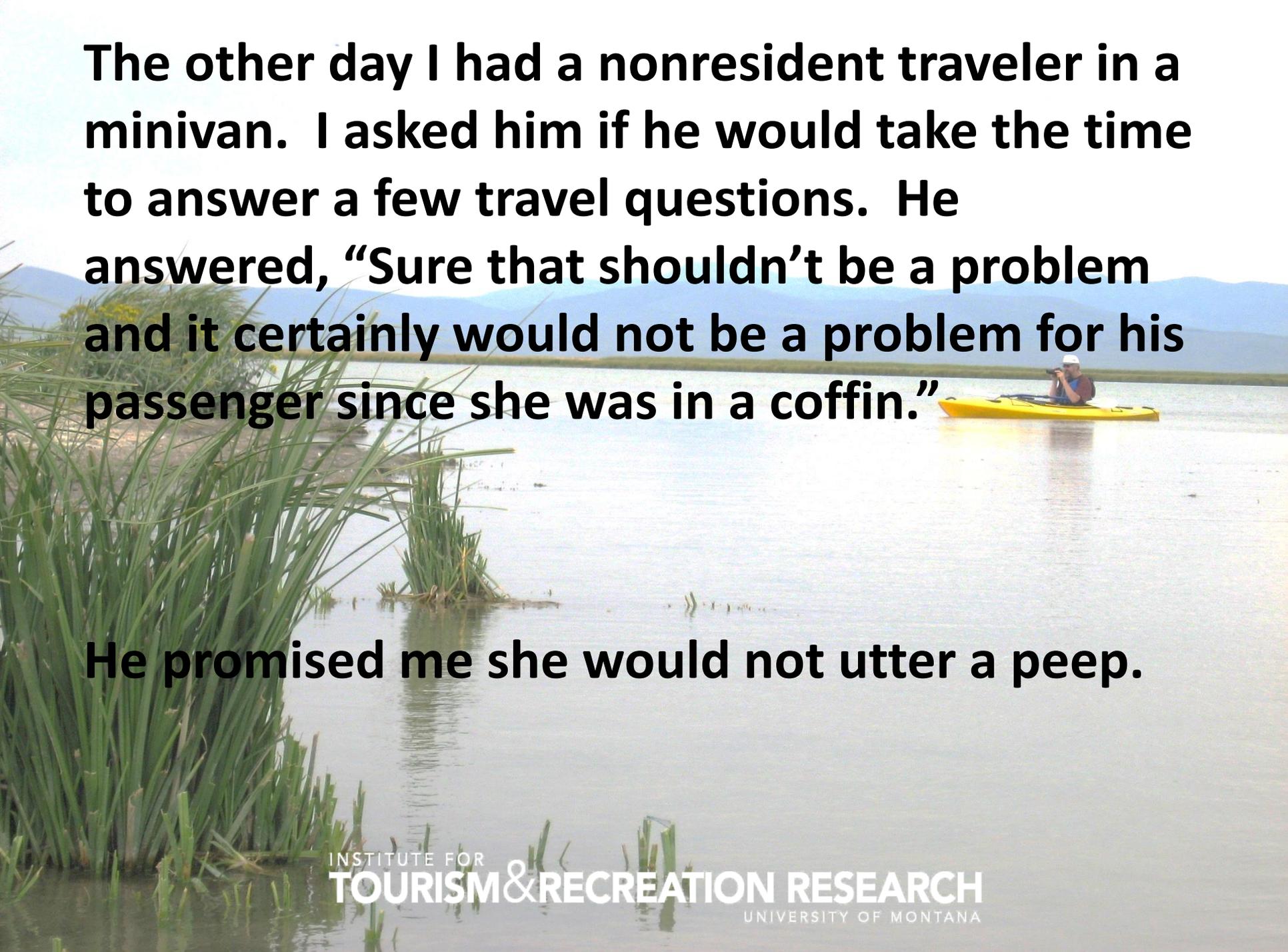
When I finished the survey they asked, “Do you really have bears in Montana?”

They told me they heard stories about rattlesnakes in ND and didn't take them seriously. They had a scary site at Roosevelt seeing an actual rattler so they thought they had better prepare themselves for MT bears!

They wondered what they could do to avoid the bears in Glacier.

A photograph of a rustic wooden barn with a weathered roof, situated in a vast, open field. In the background, there are rolling hills and mountains under a clear blue sky. The foreground is filled with tall, dry grasses.

While surveying a couple from Canada, the man offered a unique experience while shopping in Great Falls. His wife noticed a piece of folded paper near the front tire and found it to be a folded 20 dollar bill. The man made the comment " This must be why they call this THE TREASURE STATE."

A person wearing a white cap and a blue life vest is sitting in a bright yellow kayak on a calm lake. The person is holding a camera up to their eye, appearing to be taking a photograph. The water is still, reflecting the sky and the surrounding landscape. In the foreground on the left, there are tall, green reeds or grasses growing out of the water. In the background, there are rolling hills or mountains under a clear sky.

The other day I had a nonresident traveler in a minivan. I asked him if he would take the time to answer a few travel questions. He answered, “Sure that shouldn’t be a problem and it certainly would not be a problem for his passenger since she was in a coffin.”

He promised me she would not utter a peep.

I'm not a Montana resident, but I sure hope to be one someday.

Gardiner is a huge contrast to congested Jackson Hole on south entrance of Yellowstone.



“Over in Missoula all the Californians have come in and driven the price of everything sky high!”

“Today at the East Town Pump in Cut Bank was a Texan who flatly refused taking the survey saying I was crazy for being out in this weather (it was 8 above zero, chilly, but tolerable). He wanted to know what kind of clothes I was wearing and where could he get some.

I could have done the survey by the time he got done blaming me for the weather.”

And a few resident comments...

- Merry Christmas - even if you are a griz!
- It's not the tourists, it's the people who stay!
- You got any of those "Get Lost" stickers?
- Why don't people bicycling on highways not have to pay for a license to ride?



**For complete presentation
go to:**

[HTTP://WWW.ITRR.UMT.EDU/RECENT-FINDINGS/DEFAULT.PHP](http://www.itrr.umt.edu/recent-findings/default.php)

Thank You!

