The Economic Review of the Travel Industry in Montana, 2018 Edition

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The Institute for Tourism and Recreation Research provides leadership, direction, and information to aid citizens, entrepreneurs, leaders, and policy makers in decisions related to the visitor and outdoor recreation industries in Montana. From economic impacts to rural community assistance, ITRR provides objective, valid, and reliable data for Montana. This economic snapshot is made possible via allocations from the Lodging Facility Use Tax. Visit itrr.umt.edu for all tourism and recreation publications.

Visitor Numbers Continue to Grow

Following the 2008 Great Recession, visitation to Montana has grown by 25 percent. Though projections for 2018 are expected to fall below 2017 numbers, 2019 and 2020 will regain positive growth.

In 2017, nonresident visitors to Montana spent $3.36 billion. This contributed to $4.7 billion in full economic impact and supported 53,380 jobs and $1.6 billion in associated labor income.

Nonresident Visitors by Main Purpose of Trip

In 2017, nonresident vacationers represented 37 percent of all travelers to Montana but provided 58 percent of all dollars in the state at $1.96 billion. This was followed by nonresident travelers visiting friends or relatives who represented 29 percent of all travelers and provided nearly $642 million to Montana.
In 2017, Montana’s travel industry represented $6.1 billion in traveler spending. Out-of-state visitors brought in new dollars, providing 53 percent of all traveler spending, while 47 percent of dollars were distributed by residents around the state as they traveled greater than 50 miles from their home.

Montana ranks second in visitor spending per capita in Western states.

In 2017, 24 Montana counties received more than $20 million in nonresident travel spending.
Nonresident Visitation Provides Improved Air Travel

As an example, Montana’s Bozeman Yellowstone International Airport will support direct flights to 17 cities across the U.S. during peak summer travel in 2019. Bozeman has nearly doubled their direct flights in 10 years. In that same time period, nonresident visitation has increased by 22 percent. The high correlation between the increase in nonresident visitors and the number of direct flights is not a coincidence.

Traveler Spending Supports Local Entrepreneurs

- **$70 million** spent on Montana-made products by nonresident visitors
- **16 percent** of all nonresident travelers visit local Montana breweries
- **11 percent** of all visitor spending in Montana goes to locally-guided experiences

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

**$55.3 million** in revenue for hunting outfitters

**$51 million** in revenue for rafting, floating, canoeing, and kayaking outfitters
Vacationers Come to Montana for the Great Outdoors

Natural resources are the top eight out of nine reasons vacationers visit Montana.

Top vacationer activities in Montana:
- 45% go on day hikes
- 40% watch wildlife
- 37% engage in nature photography

Recreation visits to Glacier National Park and Yellowstone National Park have increased throughout the 21st century and reached an all-time high in 2017 and 2016 respectively. Though projected numbers suggest 2018 will be slightly below 2017 for Glacier, the upward trend is expected to continue into 2019. Projections suggest continued growth through 2018 and into 2019 for Yellowstone.