ICORT RESEARCH PANEL

Behind the numbers: what Idaho's 2025 Data is Telling Us

October 2026

miles PARTNERSHIP

With You



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Today

- 2025 travel industry highlights
- Conversation with the experts
- New Visit Idaho research resources
- Q&A with you

2025 TRAVEL INDUSTRY HIGHLIGHTS

Longwoods International
Dean Runyan Associates



Longwoods INTERNATIONAL

Travel USA®

Overnight Visitation Idaho

2025



State & DMA of Origin

Top Traveler Markets for Idaho

	2025
Idaho	21%
California	10%
Washington	8%
New York	7%
Utah	5%



	2025
Boise, ID	10%
Spokane, ID/WA	8%
New York, NY	7%
Salt Lake City, ID/UT	6%
Los Angeles, CA	5%

DMA of Origin is determined using the zip code entered by the respondent.

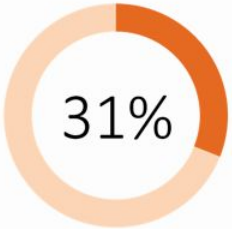
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Travel Party Composition

Solo Travelers, Children, & Pets

Solo Travel Parties

21%



Travel Parties with Pets



Travel Parties with Children

44%

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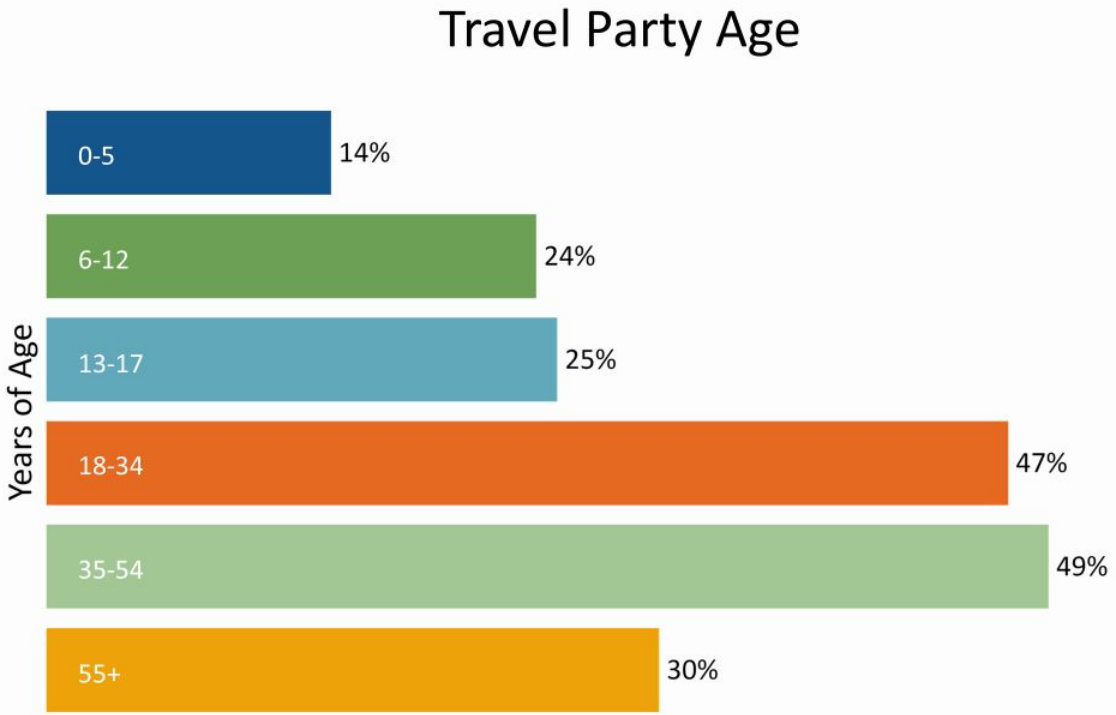
Travel Party Composition

Travel Party Size & Age

Average Travel Party Size

3.4





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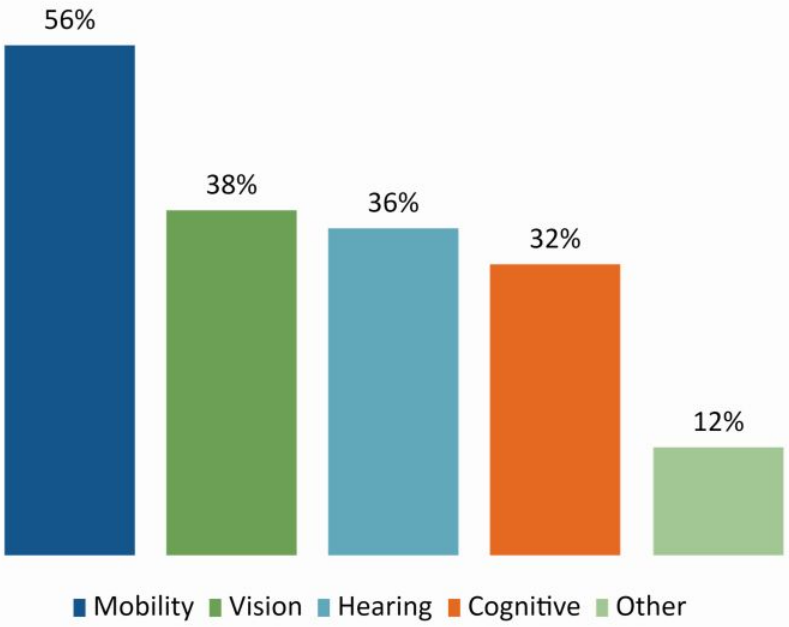
Travelers with Travel-Limiting Disabilities

Disability Categorizations

Travel Parties with an Individual Who Required Accessibility Services

30%

+12.5% vs U.S. Norm



Ease of Accessibility

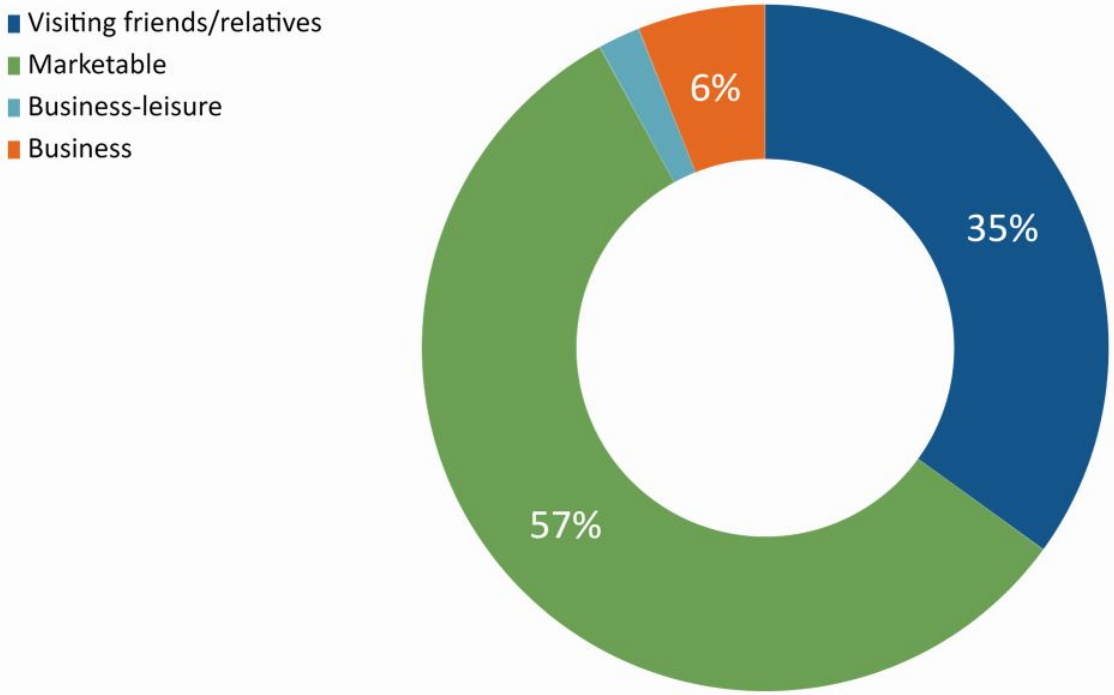


Average Satisfaction Rating

See Reference Guide for disability definitions.

Market Segmentation

A Macro View of Travelers' Main Purpose of Trip



88%

Visited Friends/Relatives Who Live in Idaho

12%

Met Friends/Relatives in Idaho Who Live Elsewhere

See Reference Guide for market segment definitions.

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Top Traveler Personas

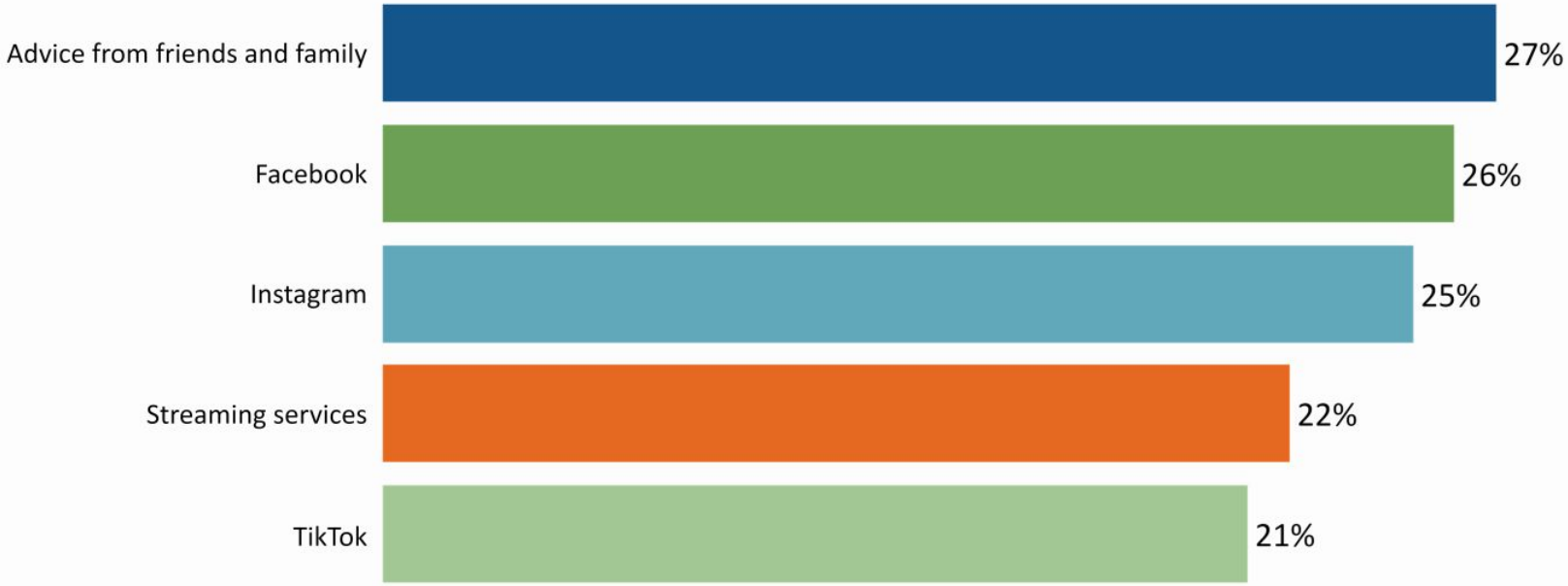
Each respondent selects **one** persona that most closely describes their travel style

19%	Budget friendly traveler: prioritizing affordability and value for money
17%	Outdoor & adventure seeker: drawn to outdoor activities and thrill-seeking
15%	Family traveler: prioritizing activities and accommodations suitable for children
9%	Luxury traveler: seeking high-end experiences and personalized services
9%	Culture/heritage/history seeker: seeking local cultures, historical sites, and engaging with local traditions
8%	Business traveler: traveling for work purposes, prioritizing convenience connectivity

See Reference Guide for a full list of traveler personas.

Sources of Trip Planning

Top Information Sources Travelers Used for Trip Planning



See Reference Guide for a full list of information sources.

Trip Structure

Share of Total Trip Spent in Idaho

Average Number of Nights Spent in Idaho

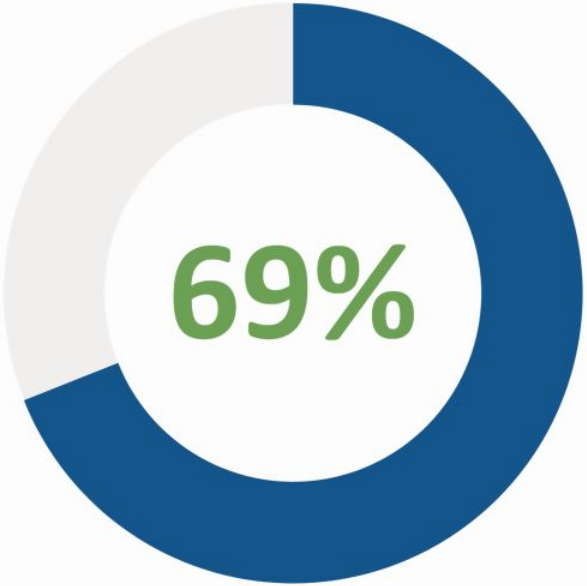
3.2

Average Number of Total Trip Nights

4.6

=

Share of Total Trip Spent in Idaho



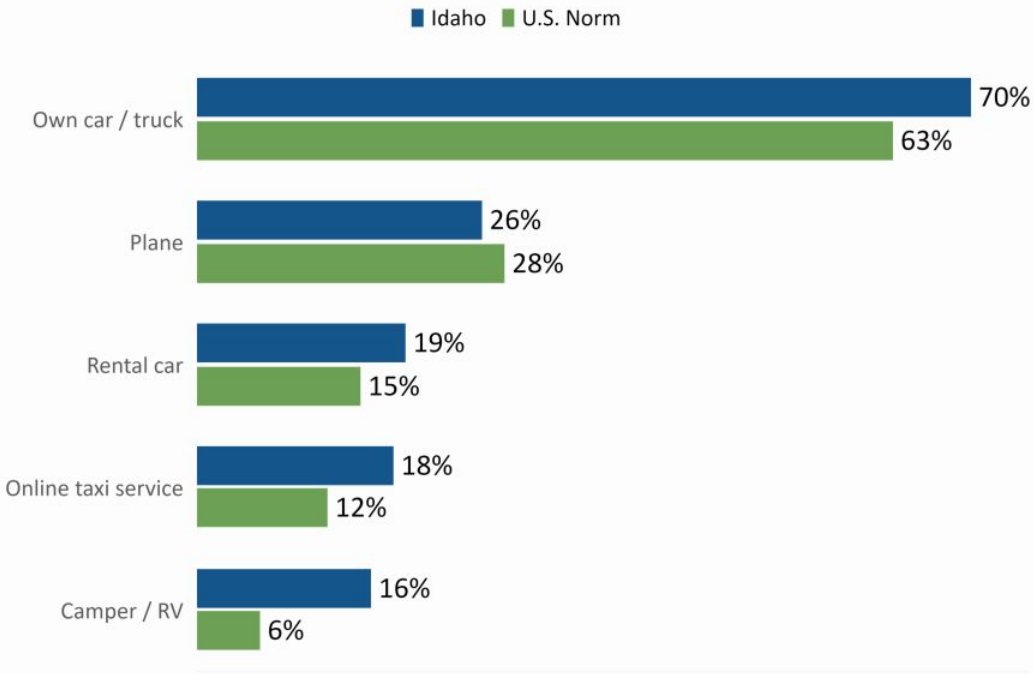
Accounts for trip nights that Idaho travelers spent in other destinations.

A higher percentage identifies the destination as the primary focus of travelers' itinerary.

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Transportation *to* Destination

Top Modes of Transportation Used by Travelers to Get to Idaho



Vehicle Type

Gasoline/diesel	72%	-6.9% vs U.S. Norm
Hybrid	18%	+5.8% vs U.S. Norm
Electric	17%	+6.7% vs U.S. Norm
Plug-in-hybrid	14%	+8.0% vs U.S. Norm

Vehicle type is only asked of travelers who selected 'rental car' or their 'own car/truck' as a mode of transportation to the destination.

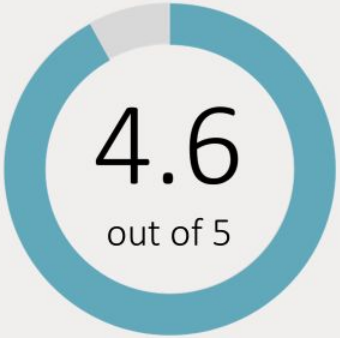
See Reference Guide for a full list of transportation modes.

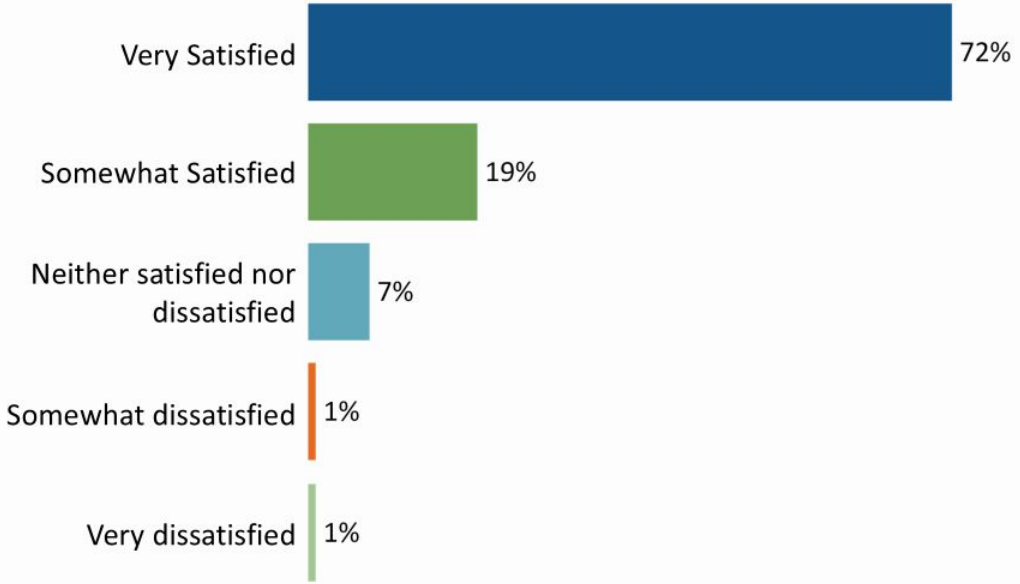
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Satisfaction with Overall Trip

How Overnight Visitors Rated Their Idaho Experience

Average Satisfaction Rating

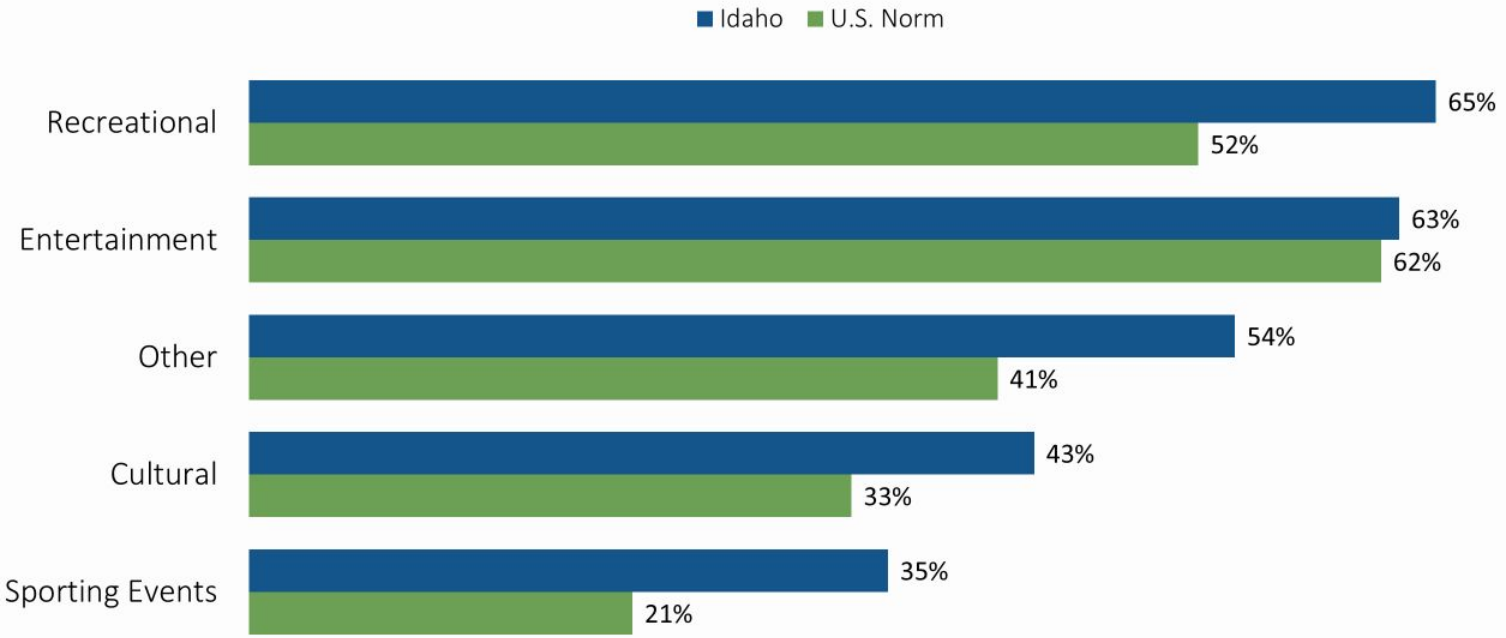




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Recreation and entertainment lead Idaho's top five activity categories

Participation rate among Idaho travelers compared with the U.S. norm



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Overnight visitors leave Idaho satisfied—and with strong intent to return

Five implications from the 2025 Travel USA® overnight visitor profile

THE EXPERIENCE DELIVERS

4.6/5
average overall satisfaction

72% very satisfied

88% repeat visitors

64% very likely to return

REGIONAL, DRIVE-BASED MARKET

21% originate in Idaho; California and Washington lead out-of-state markets. 70% arrive by their own car or truck.

SOCIAL AND FAMILY MOTIVATIONS

Visiting friends and relatives is the top trip purpose (35%); 44% travel with children and 31% with pets.

PEER ADVICE AND SOCIAL CHANNELS LEAD PLANNING

Advice from friends and family ranks first (27%); Facebook and Instagram follow at 25% each, ahead of streaming services (22%) and TikTok (21%).

COMPACT, EXPERIENCE-LED TRIPS

Visitors stay 3.2 nights and spend 69% of total trip nights in Idaho; recreation (65%) and entertainment (63%) lead participation.

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Source: 2025 Travel USA® Overnight

The Economic Impact of Travel

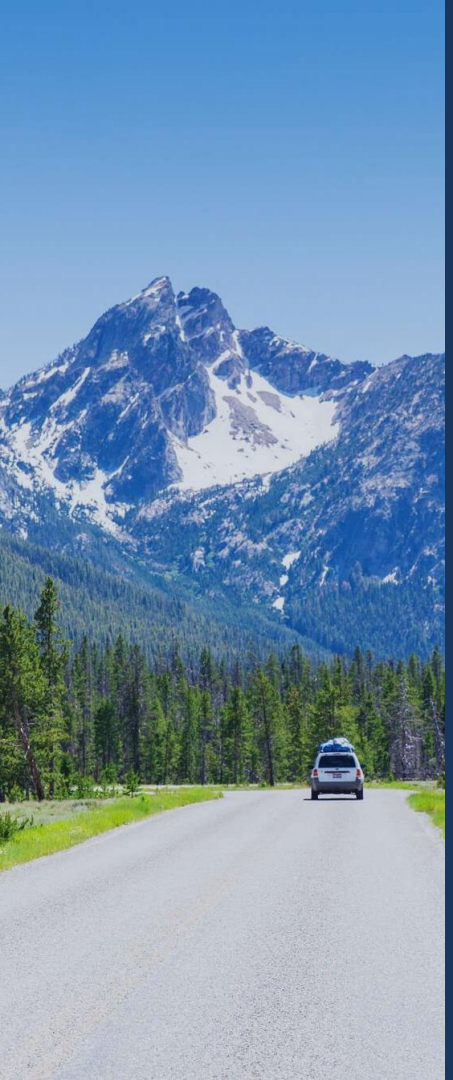
Idaho

2025 Preliminary Estimates

Presented by Jordan Bohlander

Prepared for
Visit Idaho
Dean Runyan Associates · October 2026





SECTION 1

Statewide Impacts

Direct travel spending, earnings, jobs and tax revenue across the state of Idaho

2025 at a Glance

The travel industry grew according to each top-line metric in 2025

$6.3B

Direct travel spending

▲ +3.8% vs. 2024

Up $232.1M from $6.1B in 2024

56,820

Direct travel jobs

▲ +0.8% vs. 2024

About 470 jobs added vs. 56,350

$2.0B

Direct travel earnings

▲ +4.9% vs. 2024

Up $93.9M from $1.9B in 2024

$472.3M

State & local tax revenue

▲ +4.5% vs. 2024

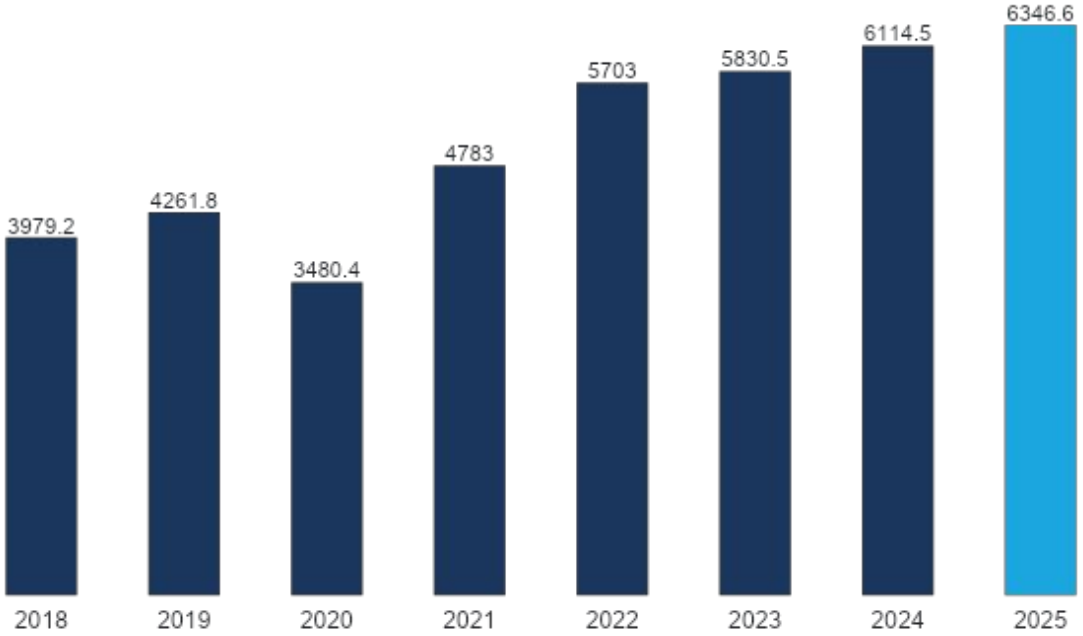
About $662 per Idaho household

Strong long-run growth: since 2018, Idaho travel spending grew 6.9% a year, earnings 6.7%, tax revenue 6.0% and employment 2.2%.

Source: Dean Runyan Associates, 2025p preliminary estimates

Direct Travel Spending

Idaho travel spending reached a new high of $6.3B



6.9%

Compound annual growth in direct travel spending, 2018–2025

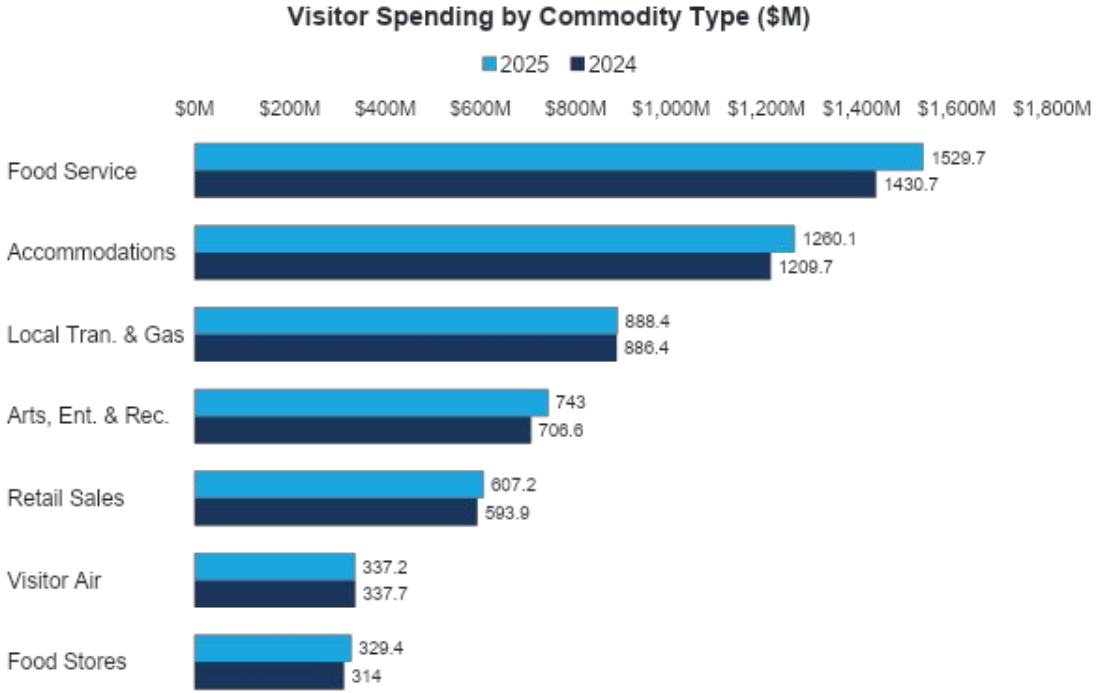
+$232.1M

Change from $6,114.5M (2024) to $6,346.6M (2025)

Source: Dean Runyan Associates, 2025p preliminary estimates

Where Visitors Spend

Food service led visitor spending at $1.53B, up 6.9%



2025 vs. 2024

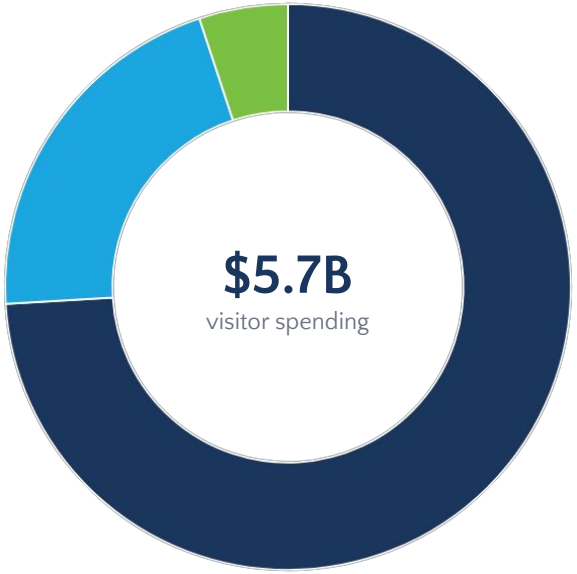
Food Service	$1,529.7M	▲ +6.9%
Arts, Ent. & Rec.	$743.0M	▲ +5.1%
Food Stores	$329.4M	▲ +4.9%
Accommodations	$1,260.1M	▲ +4.2%

Visitor air (–0.2%) was the only category to decline; local transportation & gas was flat (+0.2%).

Source: Dean Runyan Associates, 2025p preliminary estimates. Visitor spending only.

Where Visitors Come From

Three of every four visitor dollars come from out of state



Out of state
$4.22B · 74%

Idaho residents
$1.19B · 21%

International
$288.8M · 5%

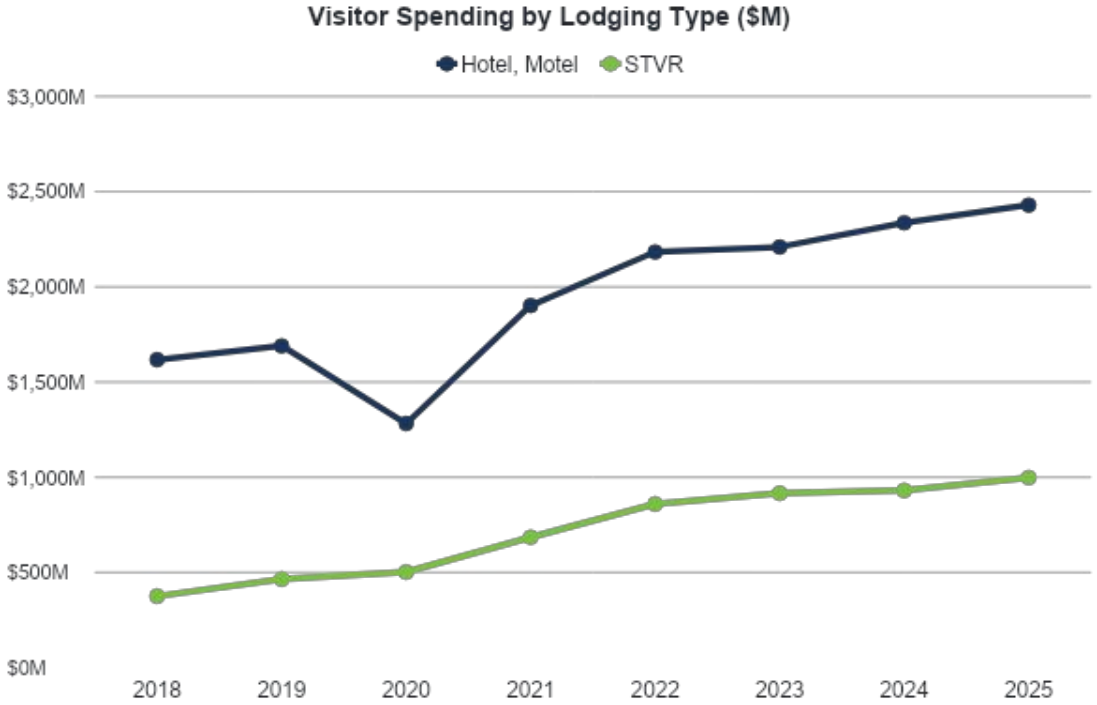


International spending fell 8.7% in 2025, to 5.1% of visitor spending.

Source: Dean Runyan Associates, 2025p preliminary estimates

Lodging Mix

Spending by visitors staying in short-term rentals has nearly tripled since 2018



STVR $998.0M

+7.2% in 2025 · 15.0% CAGR since 2018

Hotel, Motel $2,429.7M

+4.0% in 2025 · 6.0% CAGR since 2018

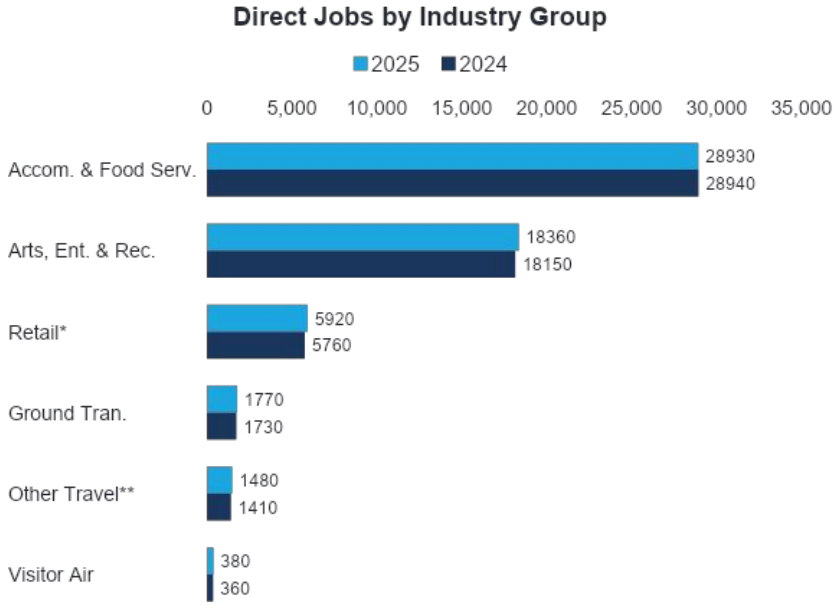
STVR guests now generate 18% of visitor spending, up from 11% in 2018.

Source: Dean Runyan Associates, 2025p preliminary estimates

Earnings & Employment

Travel earnings passed $2.0B, supporting 56,820 jobs



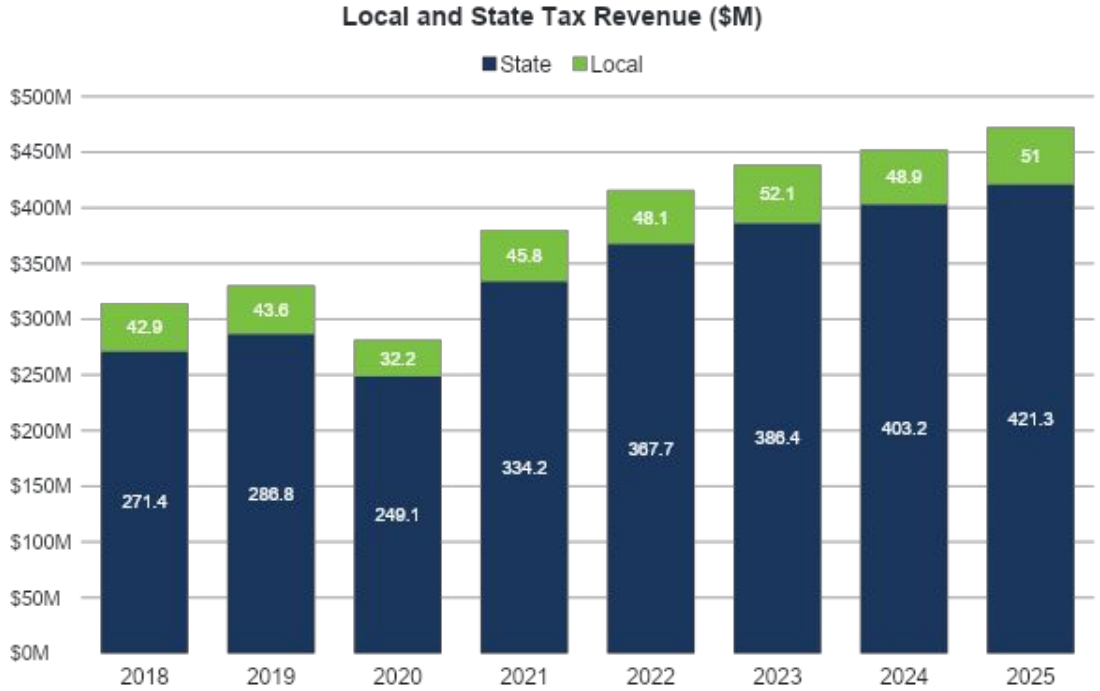


10 jobs per $1M of visitor spending. **Arts, Entertainment & Recreation** added 210 jobs (+1.2%), while Accommodation & Food Services earnings rose 2.8% to $952.1M.

Source: Dean Runyan Associates, 2025p preliminary estimates. *Incl. gas stations. **Travel arrangement & conventions.

Tax Revenue

Idaho travel generated $472.3M in state and local taxes, up 4.5%



$421.3M

State taxes (89%)
+4.5% vs. 2024 · 6.5% CAGR

$51.0M

Local taxes (11%)
+4.4% vs. 2024 · 2.5% CAGR

Visitors paid 70% of travel-generated taxes; state sales tax alone brought in $275.9M (58%).

Source: Dean Runyan Associates, 2025p preliminary estimates. Values in $ millions.

How Idaho Compares

Idaho outpaced other western states on spending and earnings growth

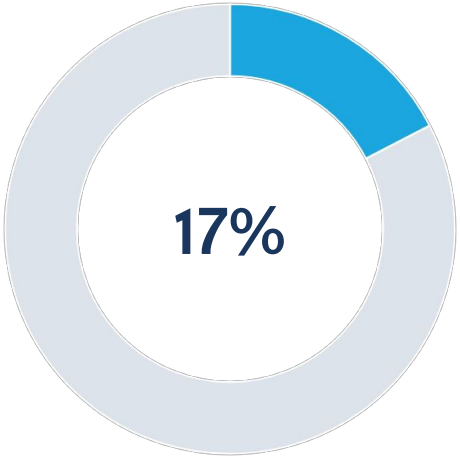
State	Spending, 2024–25	Earnings, 2024–25	Jobs, 2024–25	Spending CAGR, 2018–25
Idaho	**+3.8%**	**+4.9%**	**+0.8%**	**+6.9%**
Wyoming	+2.8%	+2.9%	-0.1%	+4.1%
Oregon	+1.8%	+4.4%	+0.3%	+2.5%
California	+1.7%	+3.3%	+0.4%	+1.8%
Arizona	+1.3%	+1.5%	+0.7%	+3.0%

Since 2018, Idaho's travel spending has grown 6.9% a year, the fastest of the five states and more than double Arizona, Oregon and California.

Source: Dean Runyan Associates, 2025p preliminary estimates. Direct travel impacts.

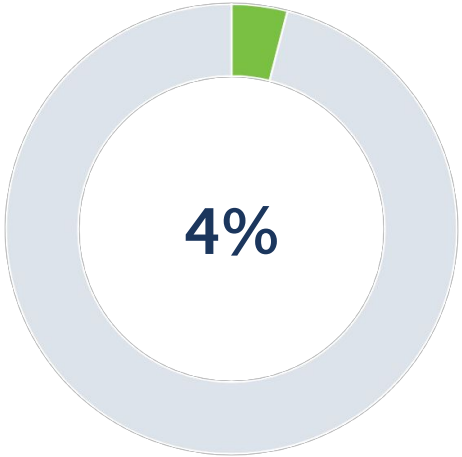
Role in the State Economy

Travel is one of Idaho's leading export industries



of export-industry GDP

Travel GDP of $2.84B among Idaho's four leading export industries



of all Idaho jobs

56,820 direct travel jobs statewide

Why it matters

- Travel GDP is on par with computer & electronics manufacturing ($2.84B each).
- Travel GDP has grown 57% since 2018.
- 79% of visitor spending comes from out-of-state and international visitors, bringing new money into Idaho.

Sources: Dean Runyan Associates; BEA; BLS



SECTION 2

Regional Impacts

Idaho's seven tourism regions: Southwestern, Northern, Eastern, Central, South Central, Southeastern and North Central

Regions at a Glance

Earnings and tax revenue grew in every region; only Southeastern spending dipped

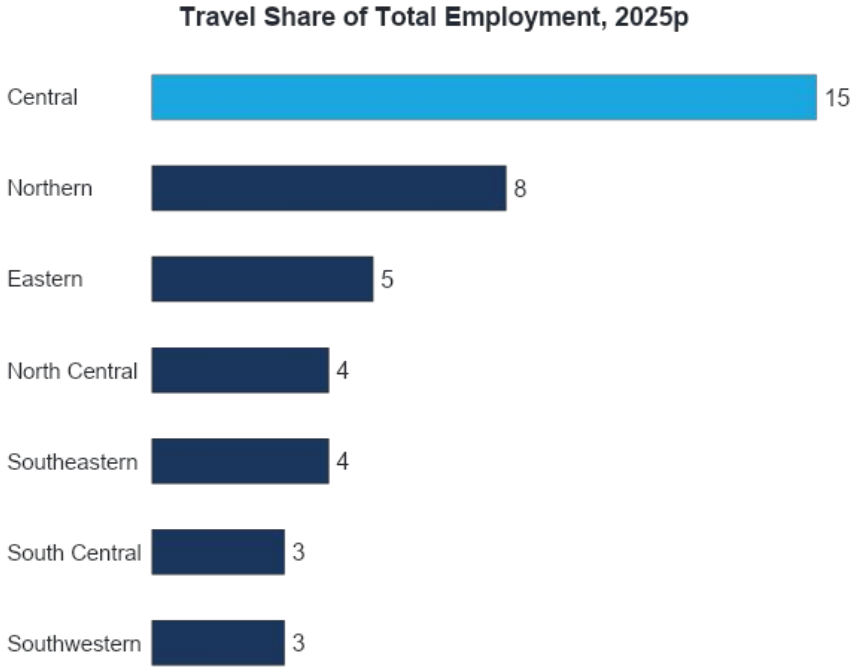
Region	Spending	Chg.	Earnings	Chg.	Jobs	Chg.	Tax revenue	Chg.
Southwestern	$2,644.4M	▲ +3.1%	$722.0M	▲ +5.3%	18,700	▲ +2.2%	$175.6M	▲ +4.5%
Northern	$1,348.9M	▲ +3.8%	$510.2M	▲ +4.5%	13,310	▼ -0.4%	$105.7M	▲ +3.6%
Eastern	$794.7M	▲ +5.9%	$222.2M	▲ +3.8%	7,320	▲ +0.2%	$60.9M	▲ +5.5%
Central	$609.6M	▲ +8.2%	$249.5M	▲ +6.4%	6,840	▲ +0.8%	$53.7M	▲ +7.6%
South Central	$361.6M	▲ +3.3%	$108.6M	▲ +4.0%	3,830	▲ +0.4%	$29.6M	▲ +3.7%
Southeastern	$355.7M	▼ -0.2%	$109.8M	▲ +4.8%	4,040	▲ +0.3%	$28.1M	▲ +1.7%
North Central	$231.7M	▲ +0.9%	$78.2M	▲ +4.1%	2,790	▲ +1.2%	$18.9M	▲ +2.9%

Central Idaho led growth in spending (+8.2%), earnings (+6.4%) and tax revenue (+7.6%). Southwestern Idaho is the largest region, with 42% of statewide travel spending.

Source: Dean Runyan Associates, 2025p preliminary estimates. 2025 values; change vs. 2024. Regional figures may not sum to state totals.

Travel's Role by Region

Travel matters most in Central Idaho, where it supports 15% of jobs



Share of visitor spending	Hotel, motel	STVR	Day travel
Central	39%	37%	2%
Eastern	35%	29%	17%
Northern	49%	19%	15%
Southwestern	43%	13%	15%
North Central	48%	7%	20%
Southeastern	37%	7%	29%
South Central	46%	4%	25%

STVRs drive over a third of visitor spending in Central Idaho and nearly a third in Eastern Idaho.

Sources: Dean Runyan Associates; BEA; BLS

Key Takeaways

1 Another record year

Direct travel spending reached $6.3B up 3.8% from 2024 and 6.9% a year since 2018.

2 Workforce gains

Earnings passed $2.0B (+4.9%), jobs grew to 56,820, and travel generated $472.3M in state and local taxes.

3 Outperforming western states

The Idaho travel industry is outperforming other western states when it comes to annual growth.

4 Broad regional growth

Six of seven regions grew; Central (+8.2%) and Eastern (+5.9%) led, and every region's tax revenue rose.

A CONVERSATION WITH THE EXPERTS

Longwoods International Dean Runyan Associates



Visit Idaho Industry Resources

Expanded Intelligence

Visit Idaho

Research

Visit Idaho supports research that the industry can use

- Insights to inform strategy
- Support local tourism partners
- Tell the story of the impact of travel

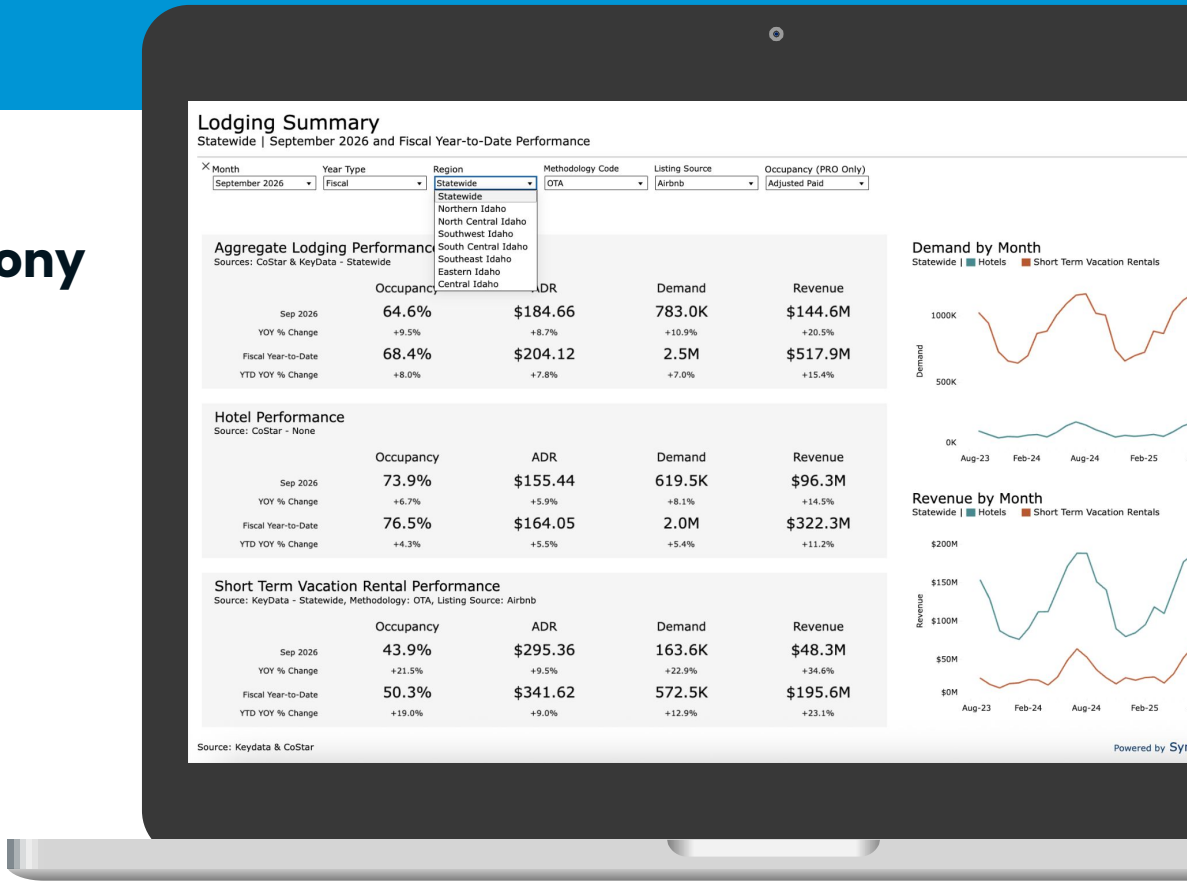
New Research Resources

Tourism Economics Symphony

Centralized Idaho Research and early market indicators updated each month

- CoStar Hotel Performance
- KeyData Short-term-Rental Performance
- Azira Geolocation Data
- Visa Credit Card Data

Going Live with October Data



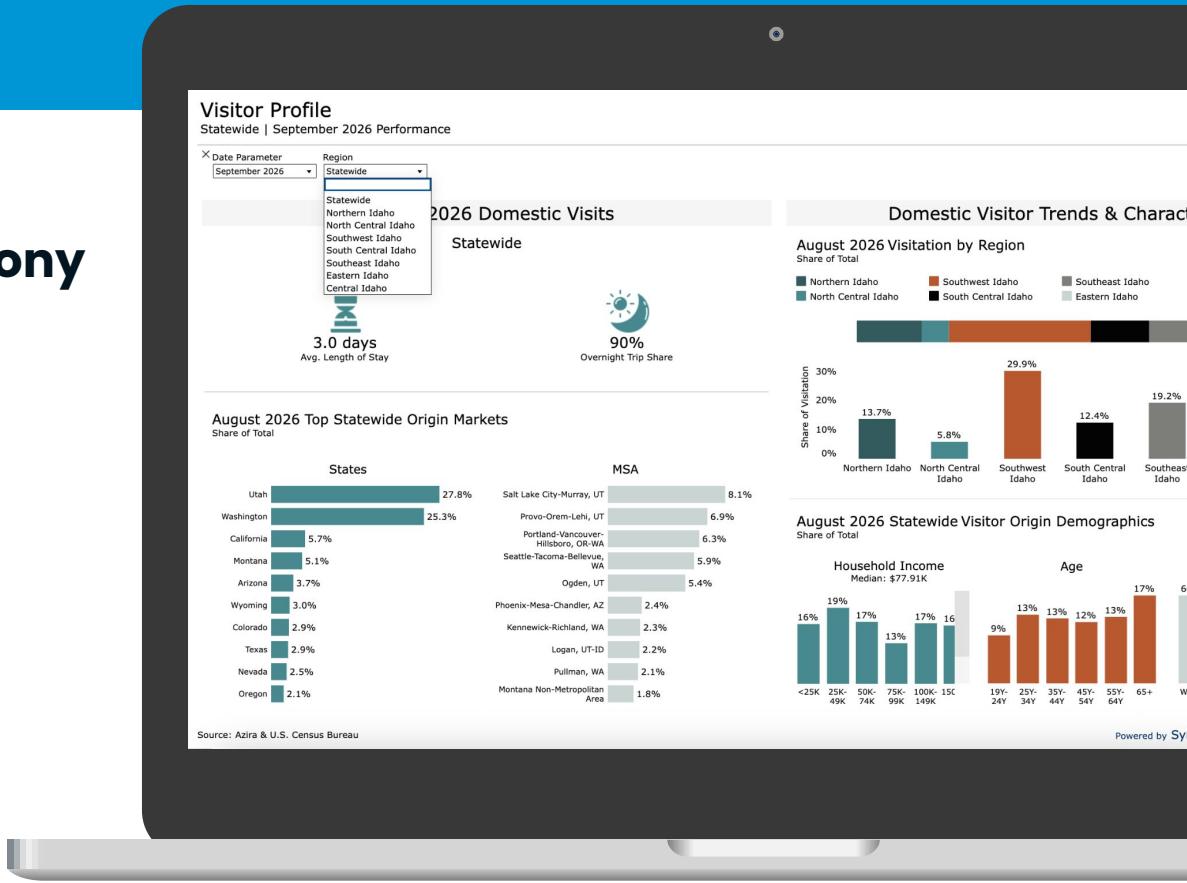
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Questions?

Thank you