

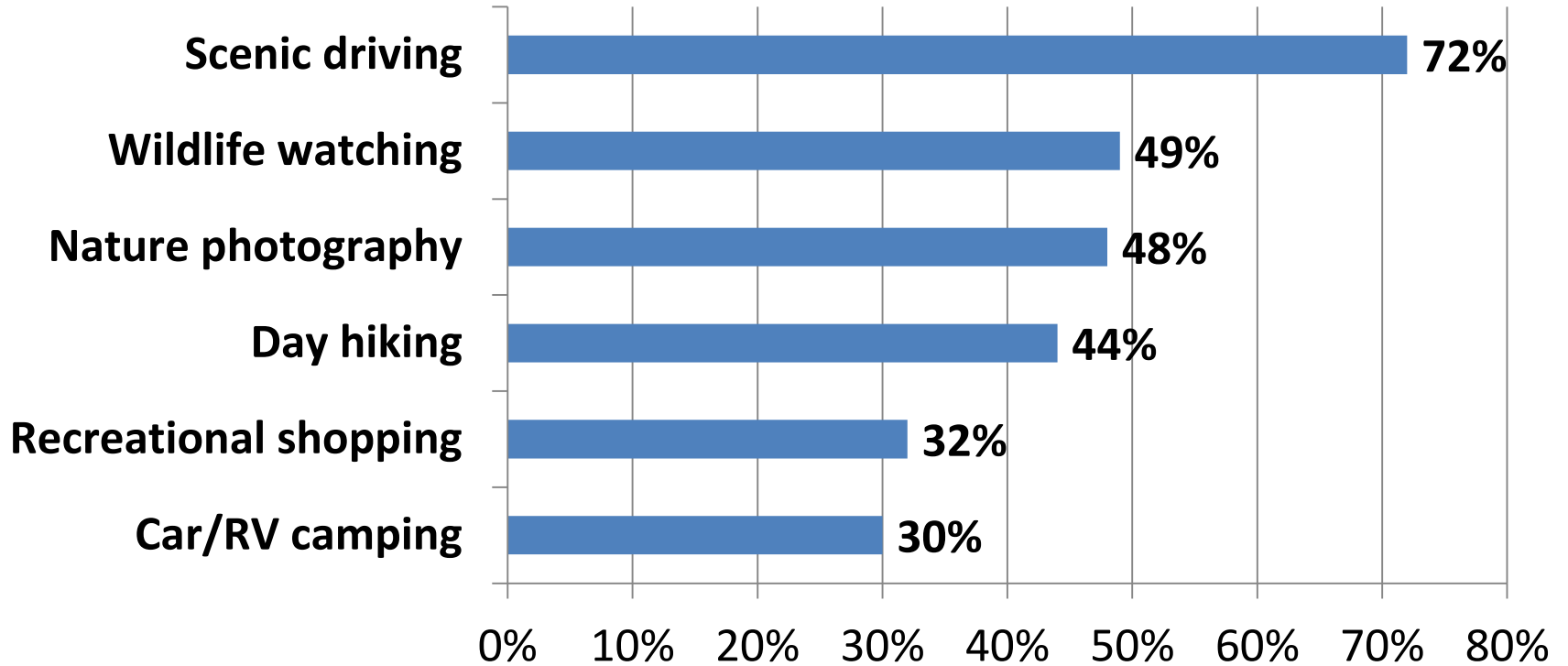
A photograph of two riders on horseback in a vast, open landscape. The rider in the foreground is wearing a dark jacket and a light-colored hat, riding a brown horse. The rider in the background is wearing a yellow jacket and a light-colored hat, riding a darker horse. The landscape is a mix of green grass and rocky terrain, with rolling hills and mountains in the distance under a blue sky.

2014 MT Outlook – Tourism & Recreation

**Norma P. Nickerson, Director
Institute for Tourism and Recreation Research
College of Forestry and Conservation
University of Montana**

Visitors like it here!

Top Nonresident Vacationer Activities 2012

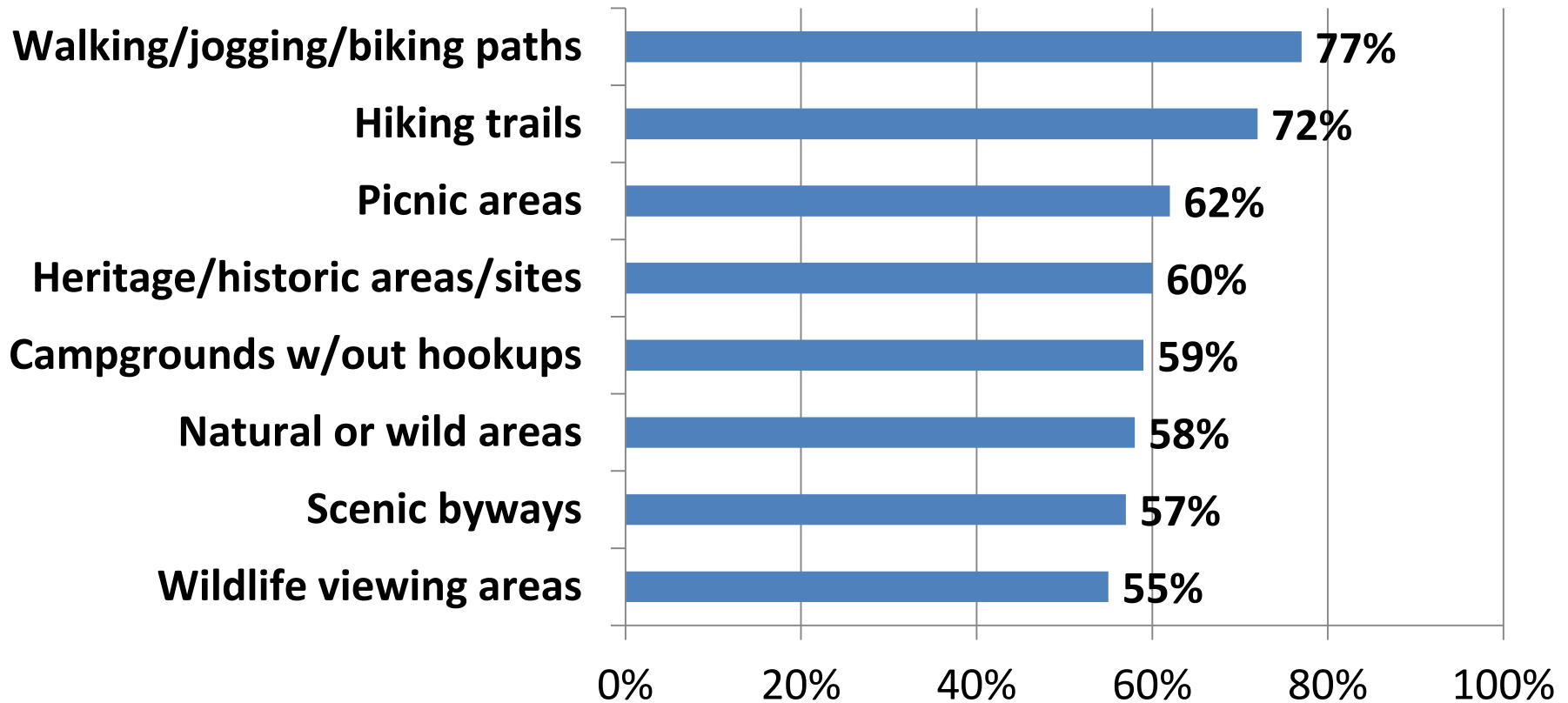


Nonresidents - By the Numbers in 2013

- **11 million nonresident visitors (+2%)**
- **\$3.5 billion in direct spending**
- **Spending up in the first 3 quarters**
 - ✓ Q1 +4% (\$151/day)
 - ✓ Q2 +5% (\$142/day)
 - ✓ Q3 +20% (\$162/day)

Residents like it here!

MT resident use of facilities and recreation areas in the state



Montanan's GOT LOST in MT



2013 by the numbers

- ✓ \$210 million on outdoor rec. trips
- ✓ 4.2 million person trips
- ✓ 88% over 18 did outdoor recreation
- ✓ 95% say outdoor recreation is important to their quality of life

The Gov't. Shutdown Effect in MT

October 2012 vs October 2013

National Park visitation down 64%



Airport deboardings down 6%

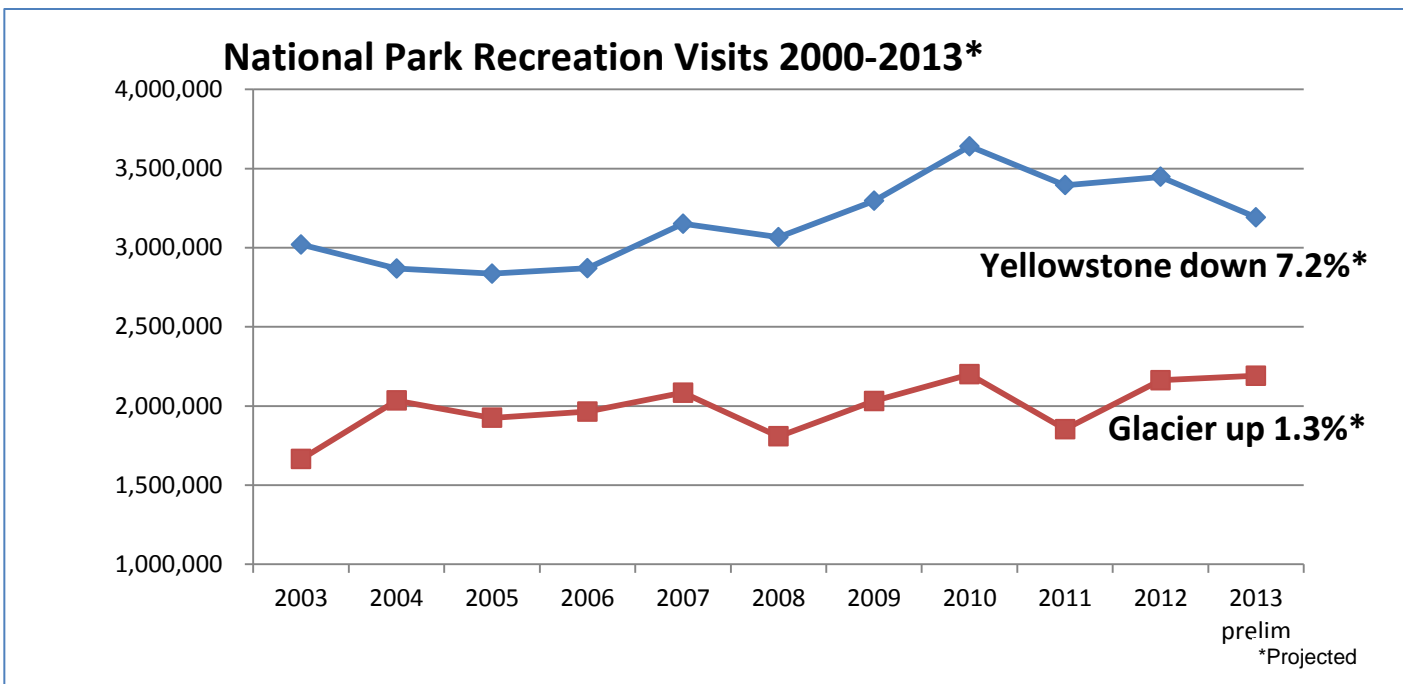
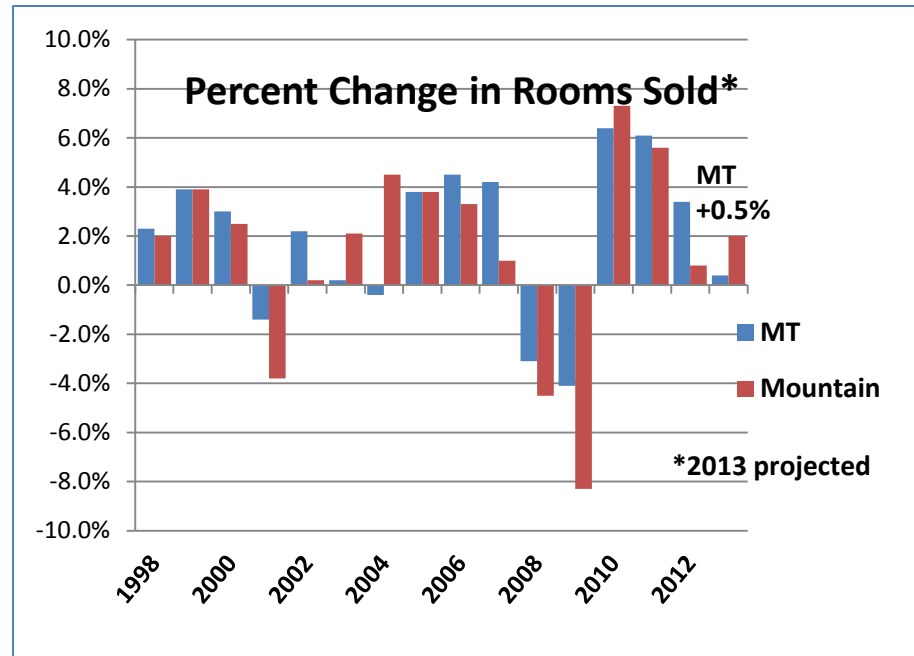
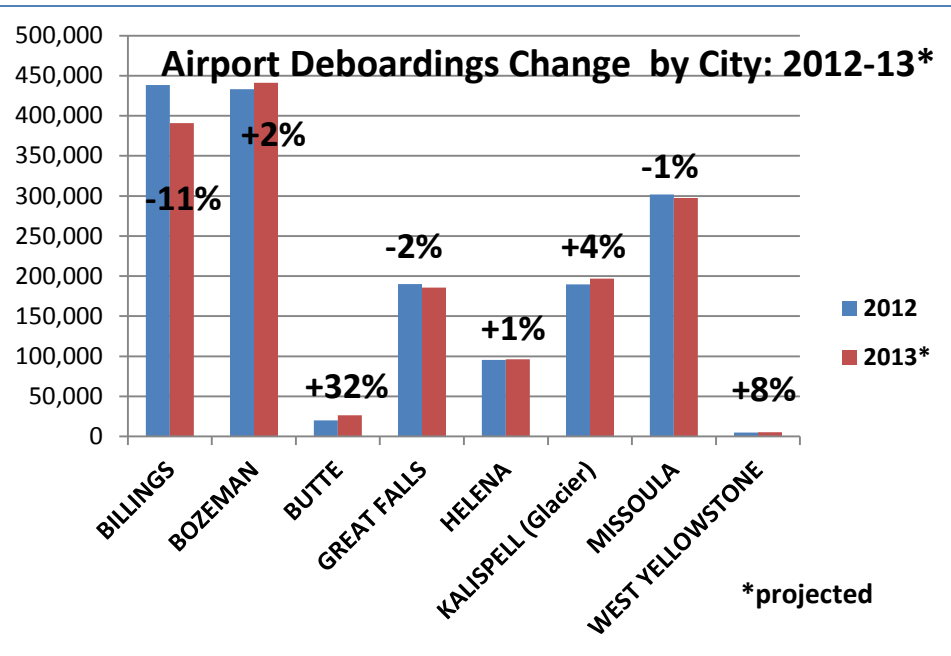


Amtrak ridership down 7%



Rooms sold down 5%





2011-2012 Nonresident Traveler Expenditures & Economic Contribution in Silver Bow County (in 2012 \$s)

2011-2012 (2-year avg.) Nonresident Traveler Expenditures in Silver Bow County



2011-2012 Nonresident Expenditure Percentages in Silver Bow County

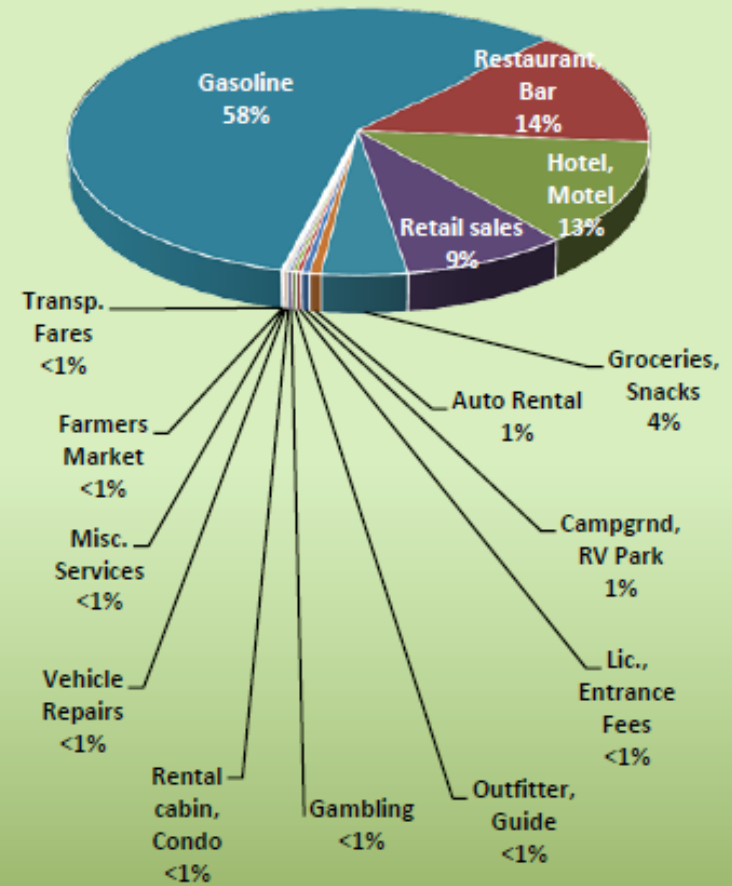


Table 1 - Total Nonresident Spending in Silver Bow County*⁰

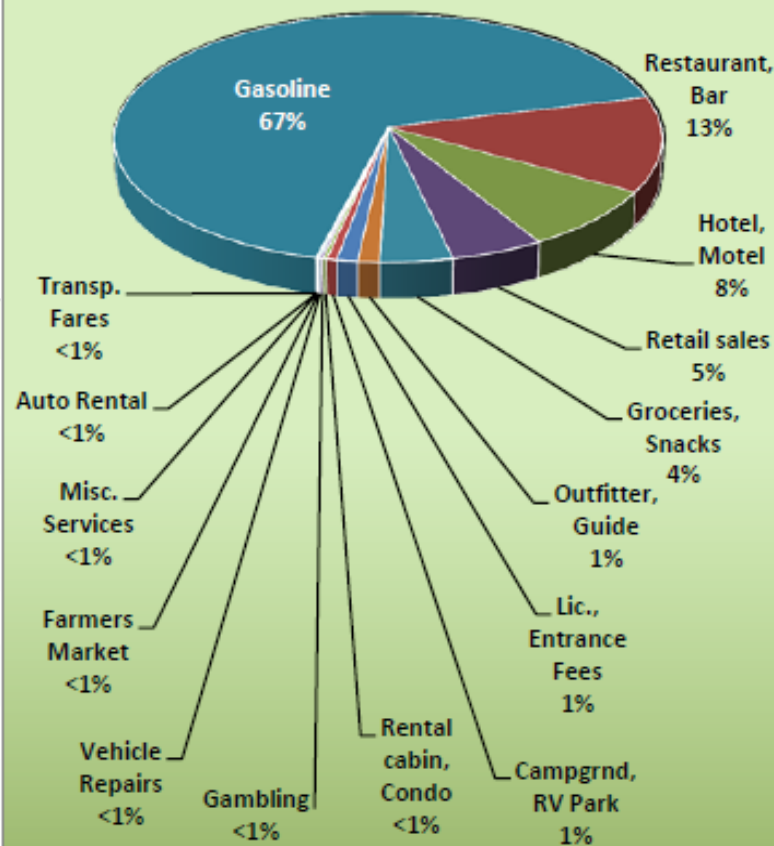
Gasoline	\$64,610,000	Lic., Entrance Fees	\$280,000
Restaurant, Bar	\$15,810,000	Outfitter, Guide	\$260,000
Hotel, Motel	\$14,120,000	Gambling	\$190,000
Retail sales	\$9,310,000	Rental cabin, Condo	\$140,000
Groceries, Snacks	\$4,860,000	Vehicle Repairs	\$130,000
Auto Rental	\$660,000	Misc. Services	\$100,000
Campgrnd, RV Park	\$440,000	Farmers Market	\$50,000
		Transp. Fares	\$10,000
TOTAL	\$110,970,000		

2011-2012 Nonresident Traveler Expenditures & Economic Contribution in Beaverhead County (in 2012 \$s)

2011-2012 (2-year avg.) Nonresident Traveler Expenditures in Beaverhead County



2011-2012 Nonresident Expenditure Percentages in Beaverhead County



Gasoline	\$75,910,000	Campgrnd, RV Park	\$620,000
Restaurant, Bar	\$14,060,000	Rental cabin, Condo	\$250,000
Hotel, Motel	\$9,100,000	Gambling	\$170,000
Retail sales	\$5,670,000	Vehicle Repairs	\$130,000
Groceries, Snacks	\$4,430,000	Farmers Market	\$60,000
Outfitter, Guide	\$1,340,000	Misc. Services	\$60,000
Lic., Entrance Fees	\$1,270,000	Auto Rental	<i>Insufficient Sample Size</i>
		Transp. Fares	<i>Insufficient Sample Size</i>
TOTAL		\$113,070,000	

2014

- 57% MT business owners expect an increase (some as high as 10%)
- Nationally expect a 2% increase in domestic travel and 5% increase in international travel





Questions?
www.itrr.umt.edu