

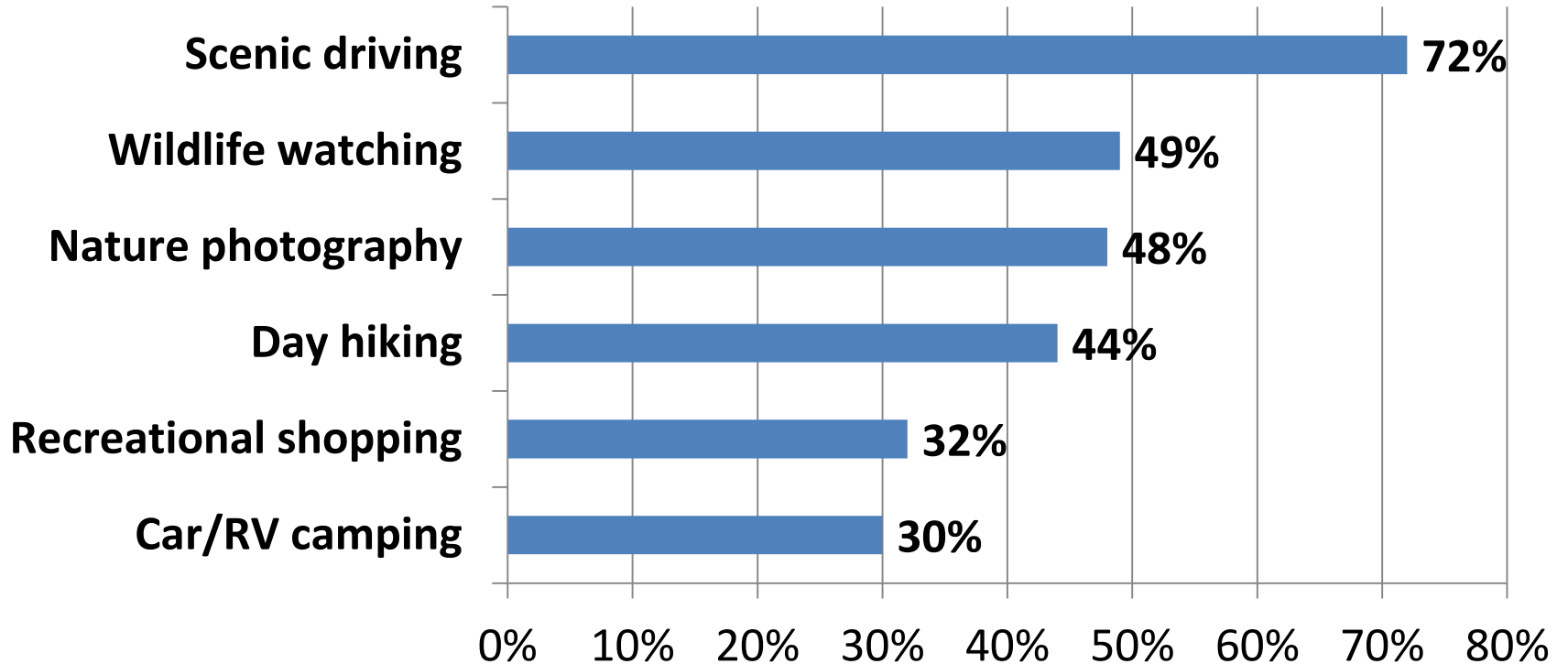
A photograph of two riders on horseback in a vast, green Montana landscape. The rider in the foreground is wearing a dark jacket and a light-colored hat, riding a brown horse. The rider in the background is wearing a yellow jacket and a light-colored hat, riding a darker horse. The background features rolling green hills and distant mountains under a blue sky.

2014 MT Outlook – Tourism & Recreation

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Visitors like it here!

Top Nonresident Vacationer Activities 2012



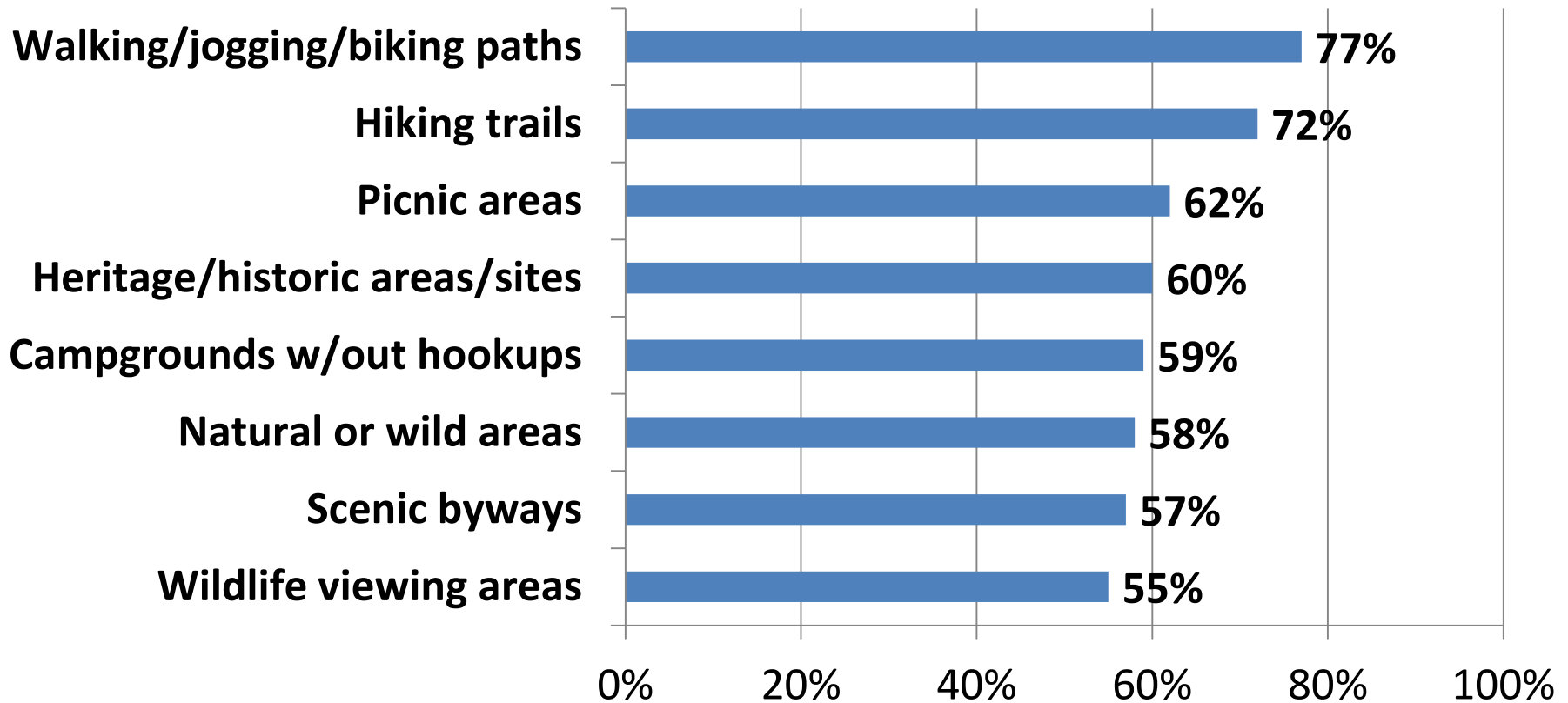
Nonresidents - By the Numbers in 2013

- **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%

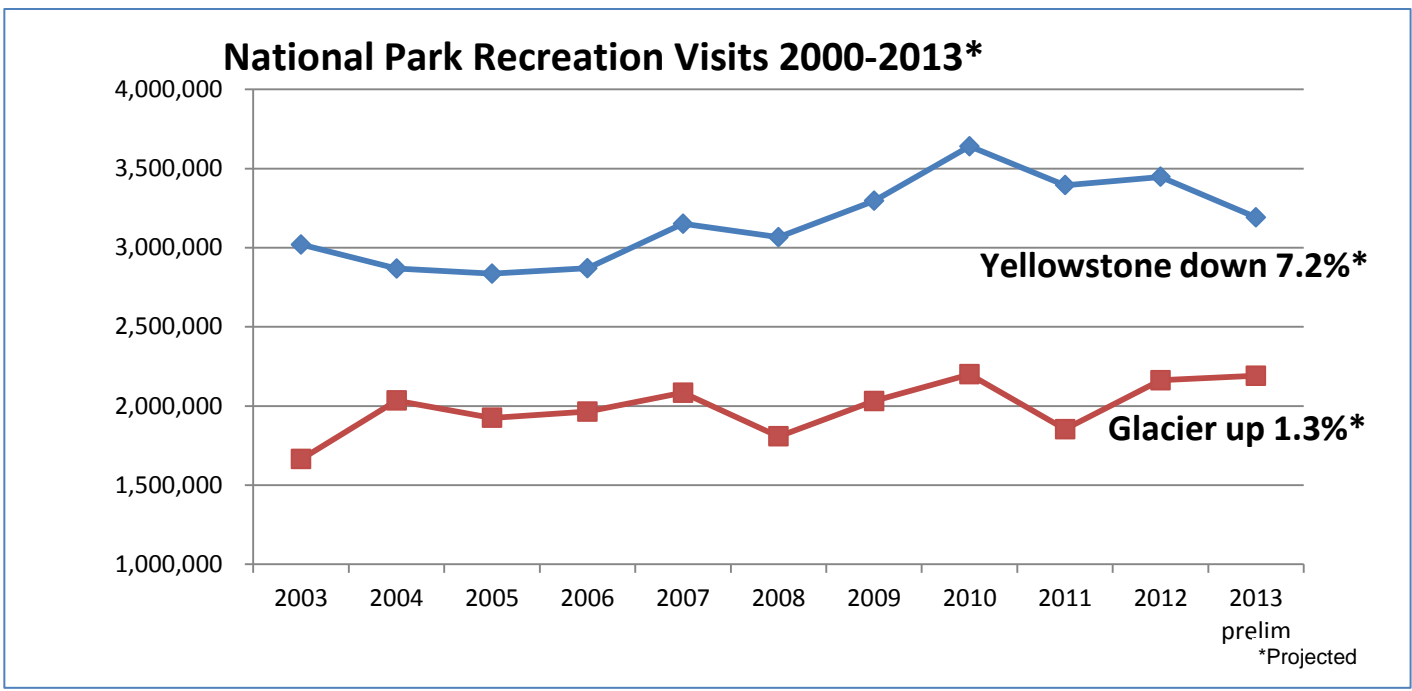
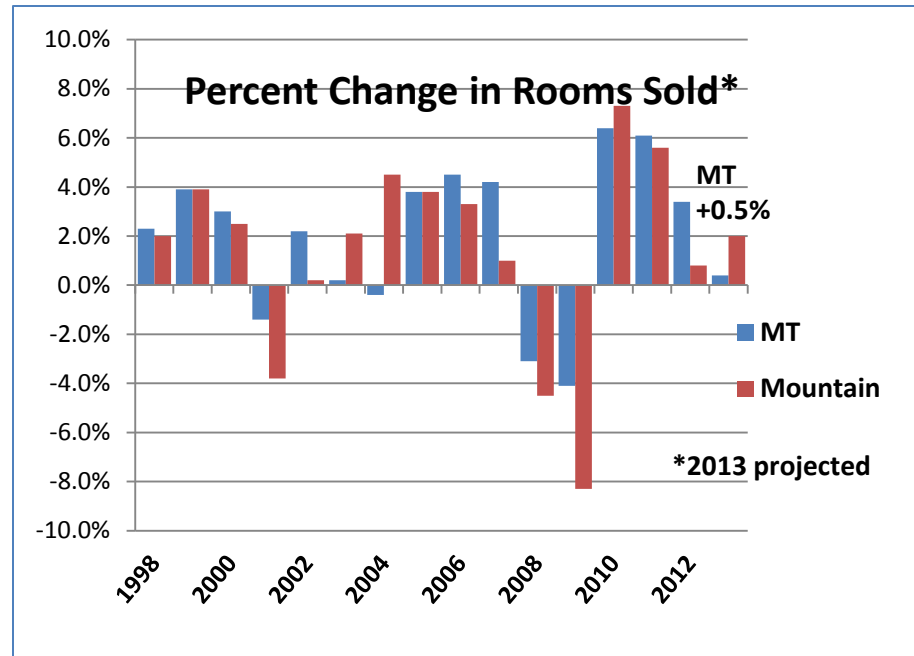
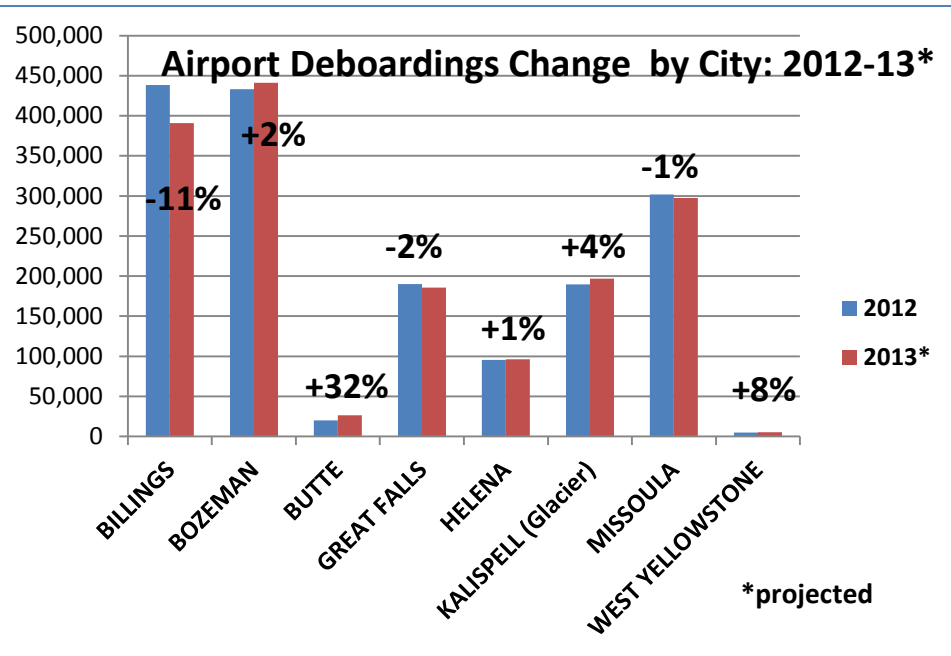


Amtrak ridership down 7%



Rooms sold down 5%





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

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



2011-2012 Nonresident Expenditure Percentages in Yellowstone County

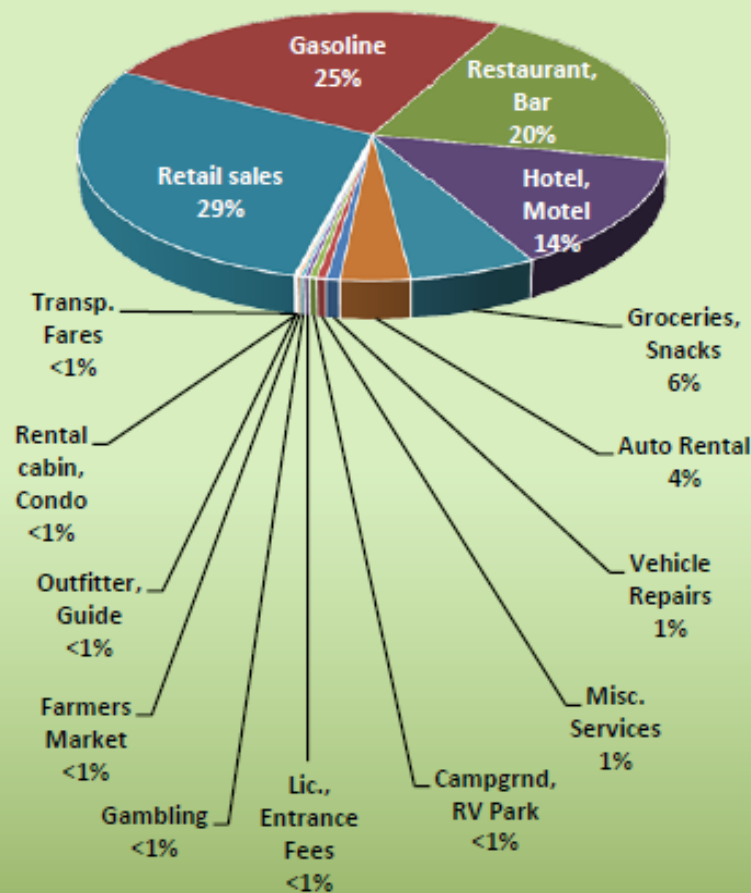


Table 1 - Total Nonresident Spending in Yellowstone County*⁰

Retail sales	\$129,010,000	Misc. Services	\$2,080,000
Gasoline	\$110,410,000	Campgrnd, RV Park	\$1,660,000
Restaurant, Bar	\$90,820,000	Lic., Entrance Fees	\$1,200,000
Hotel, Motel	\$60,870,000	Gambling	\$810,000
Groceries, Snacks	\$28,070,000	Farmers Market	\$640,000
Auto Rental	\$15,730,000	Rental cabin, Condo	\$370,000
Vehicle Repairs	\$3,050,000	Outfitter, Guide	\$230,000
		Transp. Fares	\$150,000
TOTAL		\$445,100,000	

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