

# Outlook 2007 – Travel and Recreation in Montana

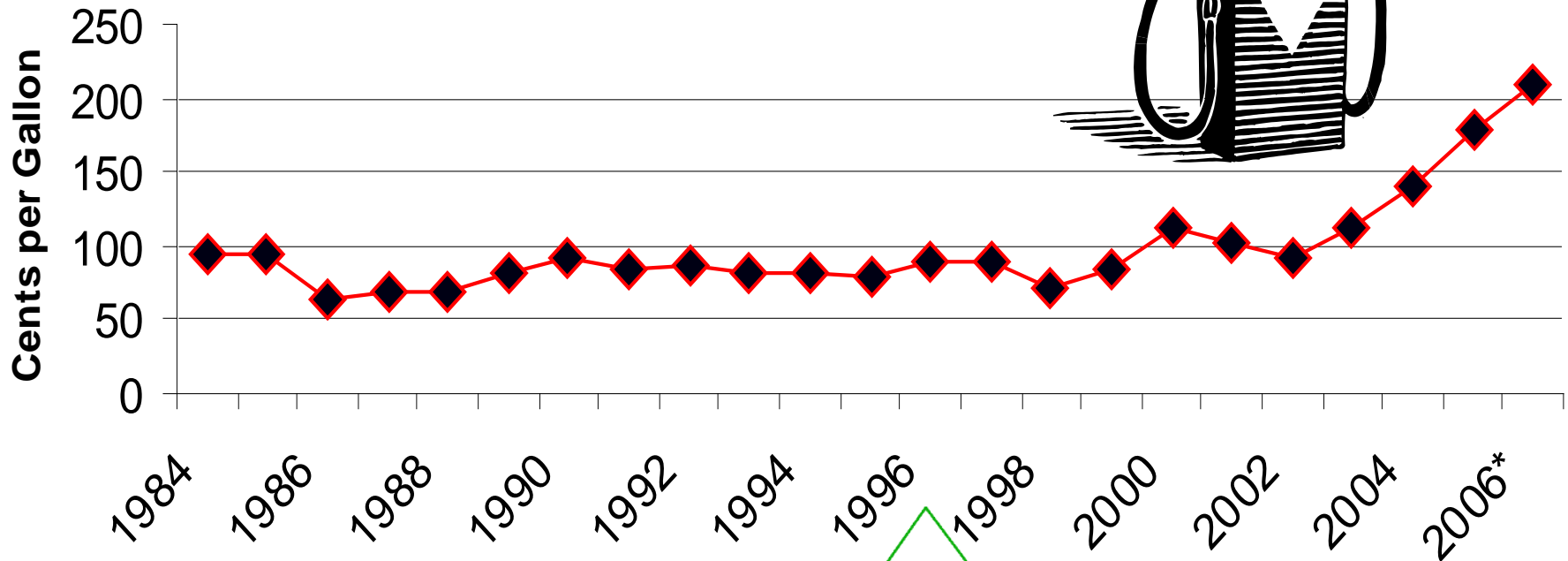


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# Gripping About Gas Prices?

## Montana Regular Gasoline Retail Prices 1984-2006



\*September YTD

Source: Energy Information Administration

# Nonresident Expenditures

Expenditure Category	Average Daily per Group <sup>1*</sup> (group size= 2.45)	Allocation by Category	Total Expenditures**
<b>Gasoline, Oil</b>	<b>\$39.91</b>	<b>28%</b>	<b>\$773,300,000</b>
<b>Restaurant, Bar</b>	<b>\$30.66</b>	<b>21%</b>	<b>\$586,400,000</b>
<b>Retail Sales</b>	<b>\$22.80</b>	<b>16%</b>	<b>\$433,700,000</b>
<b>Hotel, B&amp;B, etc.</b>	<b>\$13.61</b>	<b>9%</b>	<b>\$257,800,000</b>
<b>Groceries, Snacks</b>	<b>\$12.07</b>	<b>8%</b>	<b>\$232,900,000</b>
<b>Auto Rental and Repairs</b>	<b>\$6.94</b>	<b>5%</b>	<b>\$129,400,000</b>
<b>Outfitter, Guide</b>	<b>\$6.21</b>	<b>4%</b>	<b>\$118,700,000</b>
<b>Transportation Fares</b>	<b>\$3.16</b>	<b>2%</b>	<b>\$55,200,000</b>
<b>Licenses, Entrance fees</b>	<b>\$2.80</b>	<b>2%</b>	<b>\$56,300,000</b>
<b>Misc. Services</b>	<b>\$2.22</b>	<b>1%</b>	<b>\$39,700,000</b>
<b>Campground, RV Park</b>	<b>\$2.05</b>	<b>2%</b>	<b>\$44,900,000</b>
<b>Gambling</b>	<b><u>\$1.52</u></b>	<b><u>1%</u></b>	<b><u>\$27,400,000</u></b>
<b>Total</b>	<b>\$143.95</b>	<b>100%</b>	<b>\$2,755,700,000</b>

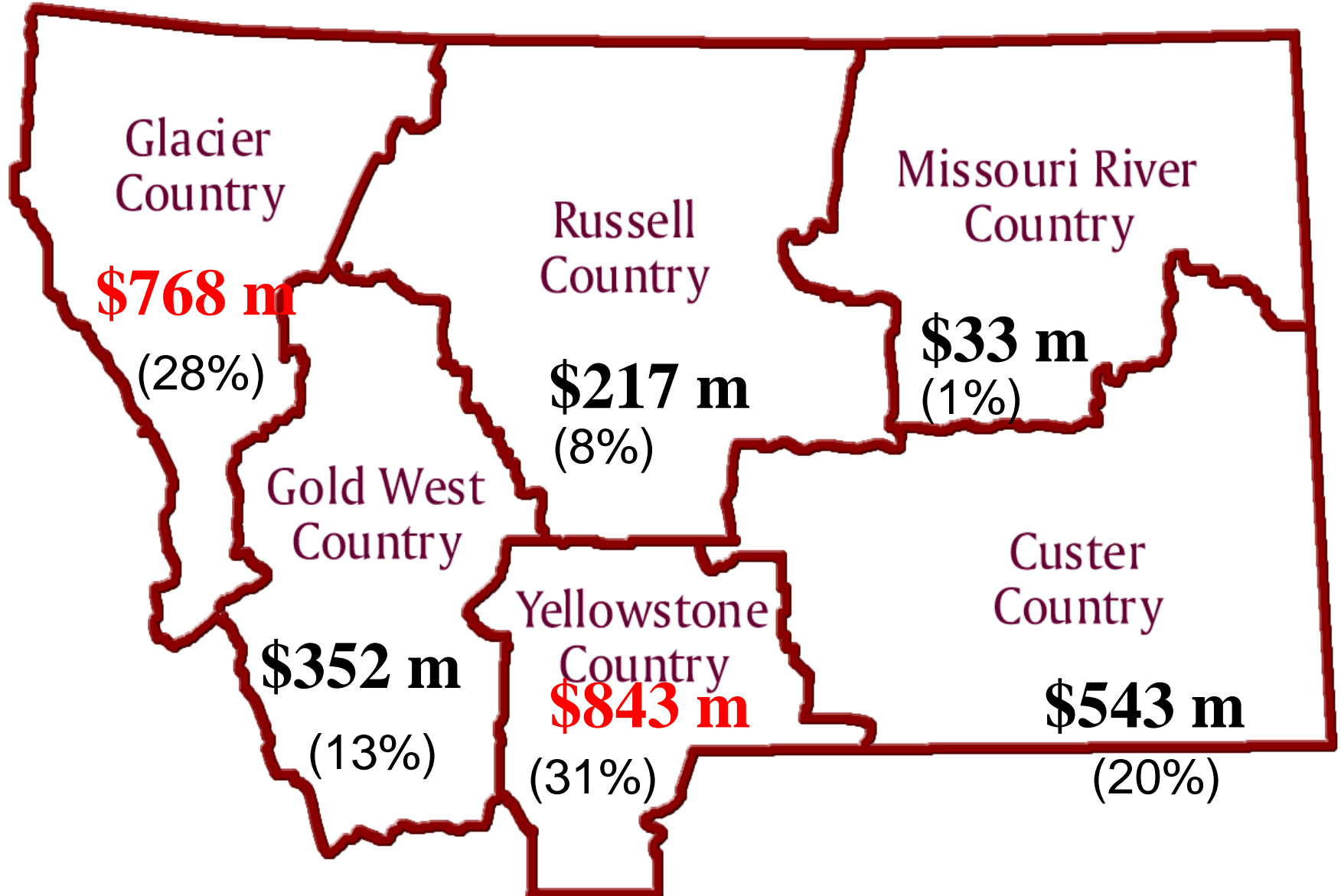
# Nonresident Expenditures

- Vacationers spend \$183.37/day
- Visitors on Business spend \$145.24/day
- VFR visitors spend \$139.83/day
- Visitors Passing thru spend \$96.26/day

34% of nonresidents are primarily in MT for vacation but this number has decreased 7% in the past four years.



# Expenditure by Travel Region



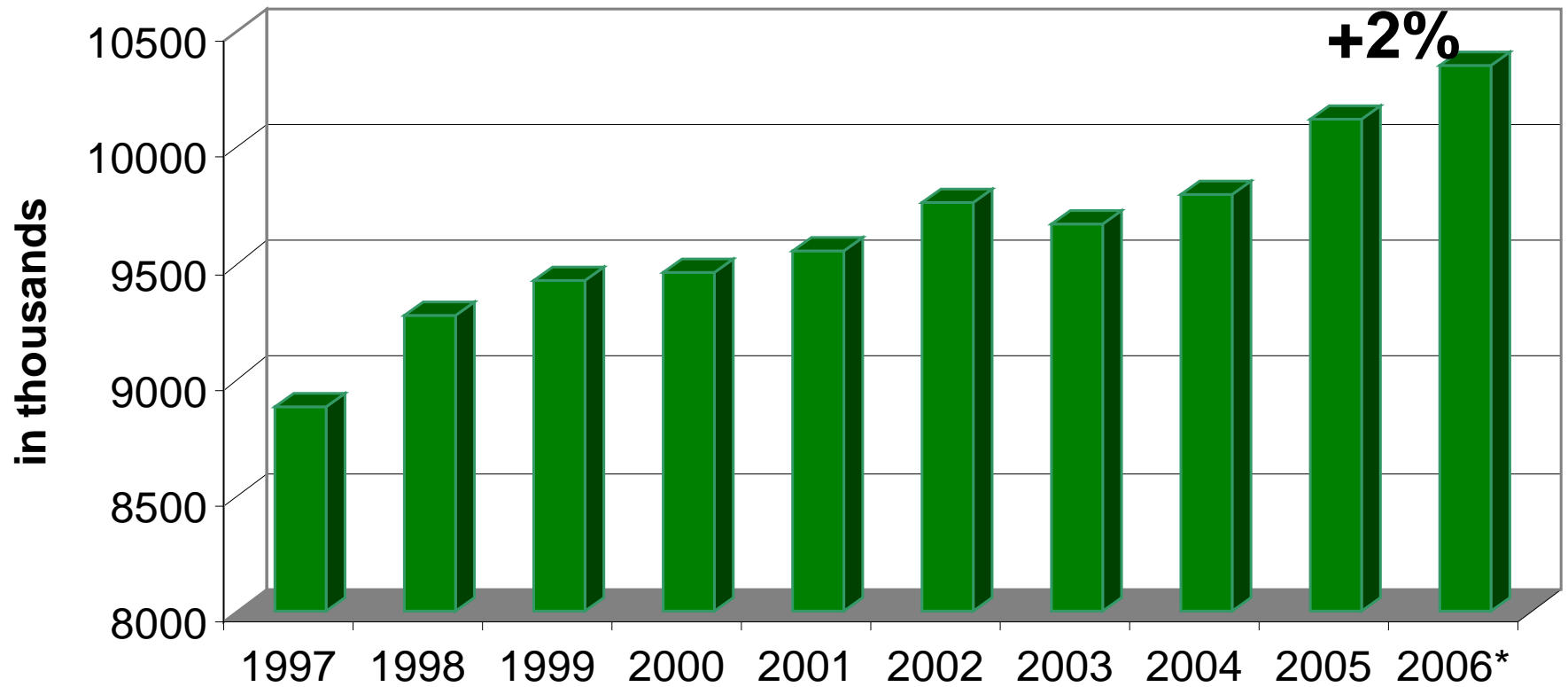
# Tourism Impacts to Montana

**2005:**

- **\$2.7 billion direct expenditures**
- **34,500 direct jobs**
- **Nearly 46,000 combined jobs**
- **\$143 million in direct state & local taxes**
- **\$202 million in combined tax impact**



# Montana Nonresident Visitor Trends

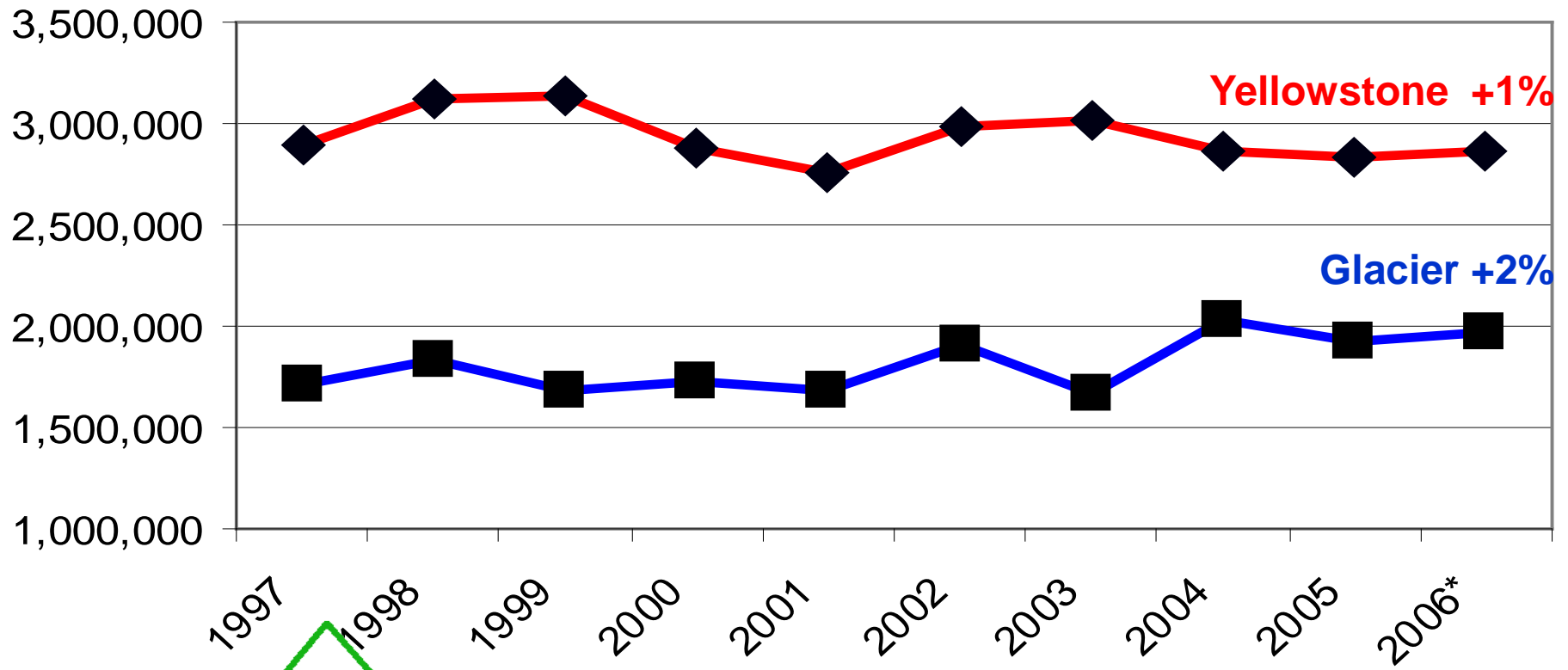


\*Preliminary

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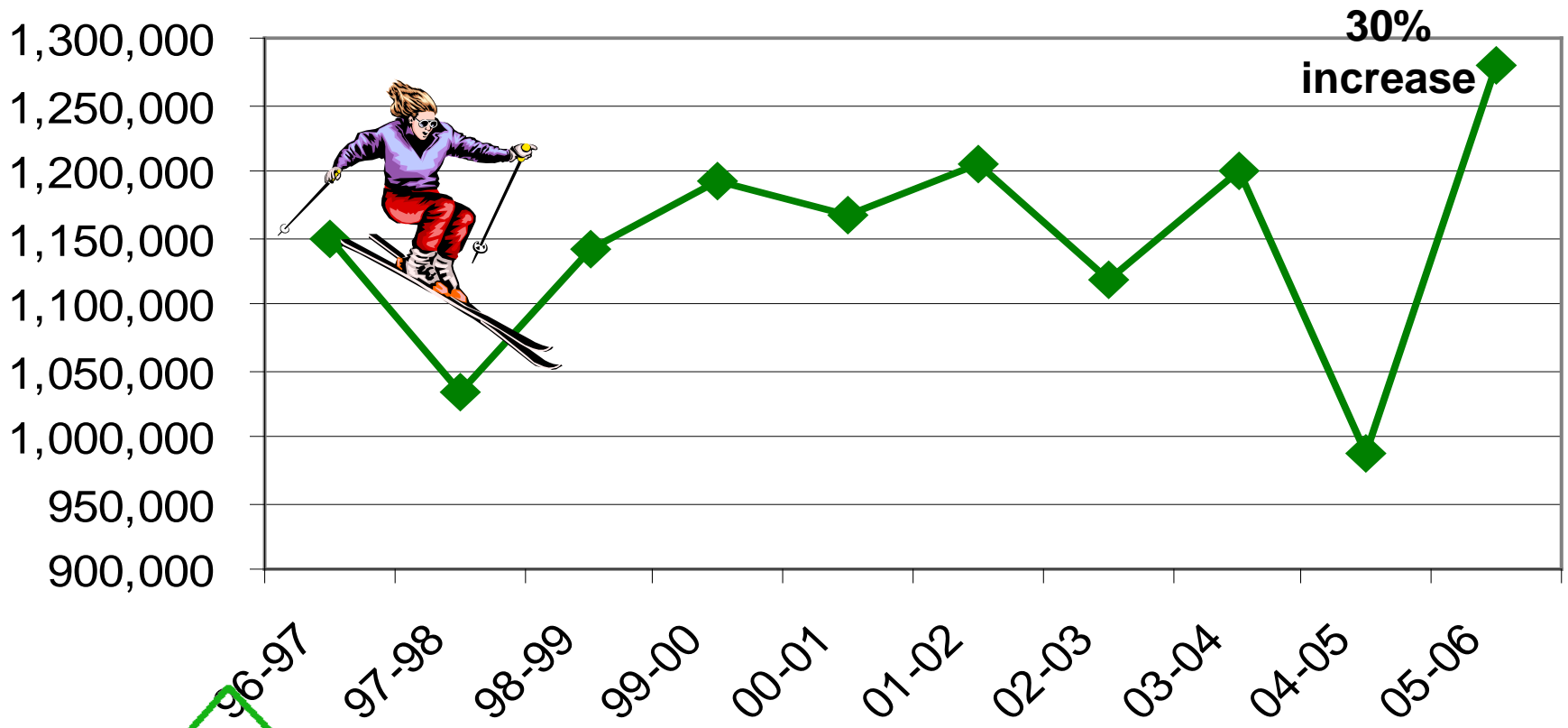


# Glacier and Yellowstone National Park Recreation Visitor Trends





# Montana Ski Area Visits: 10 Year Trend



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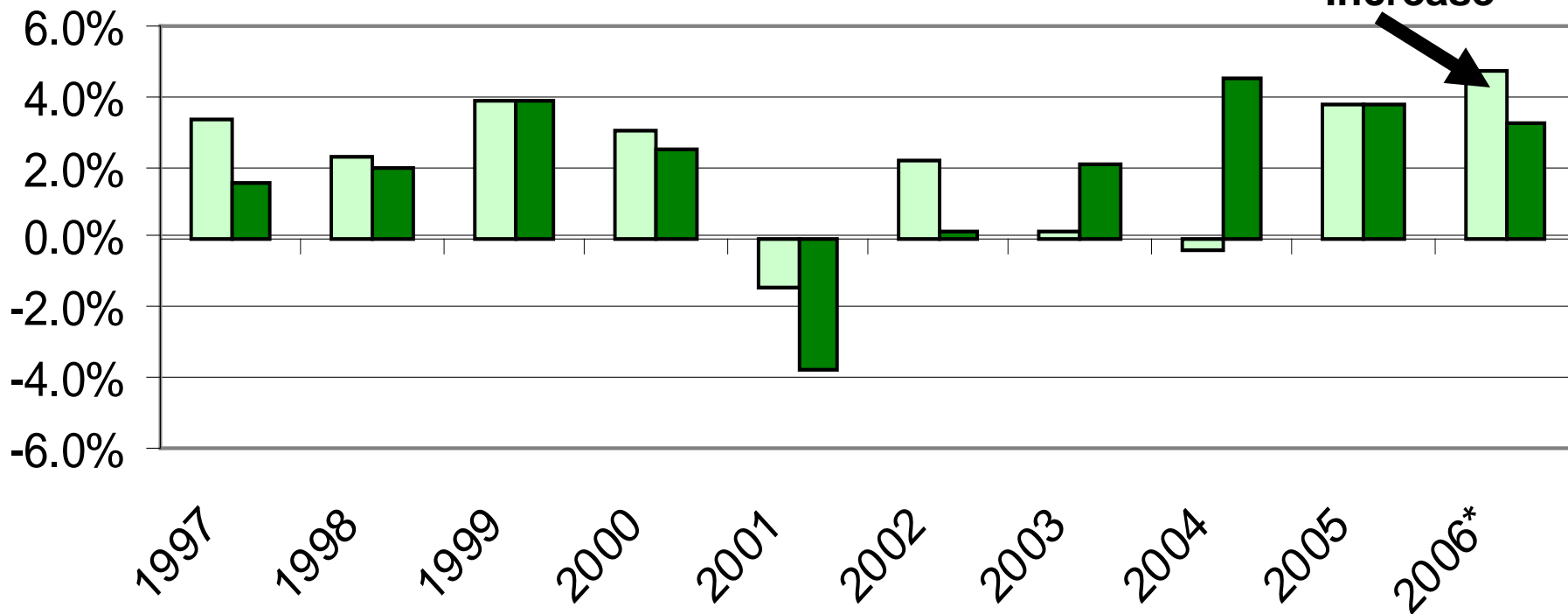
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# Percent Change in Rooms Sold

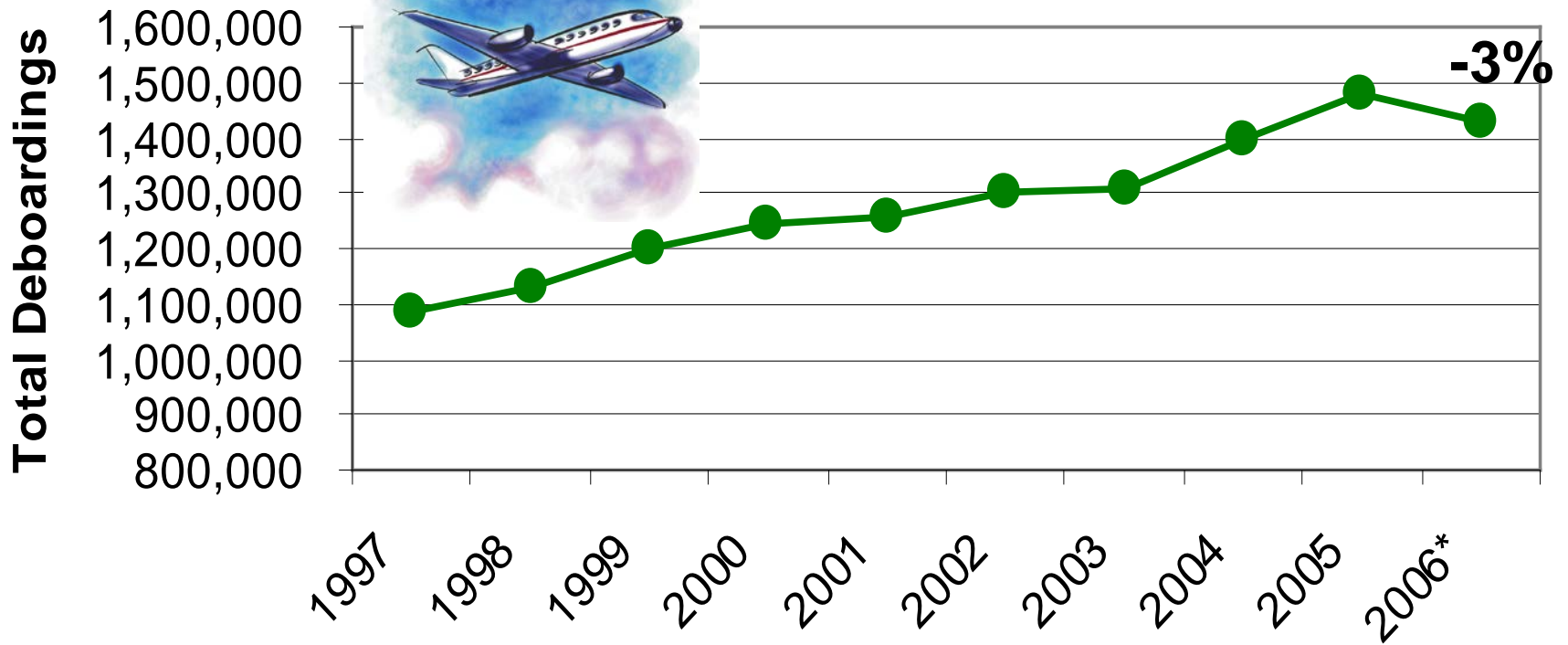
(November Year to Date)

□ Montana ■ Mountain Region

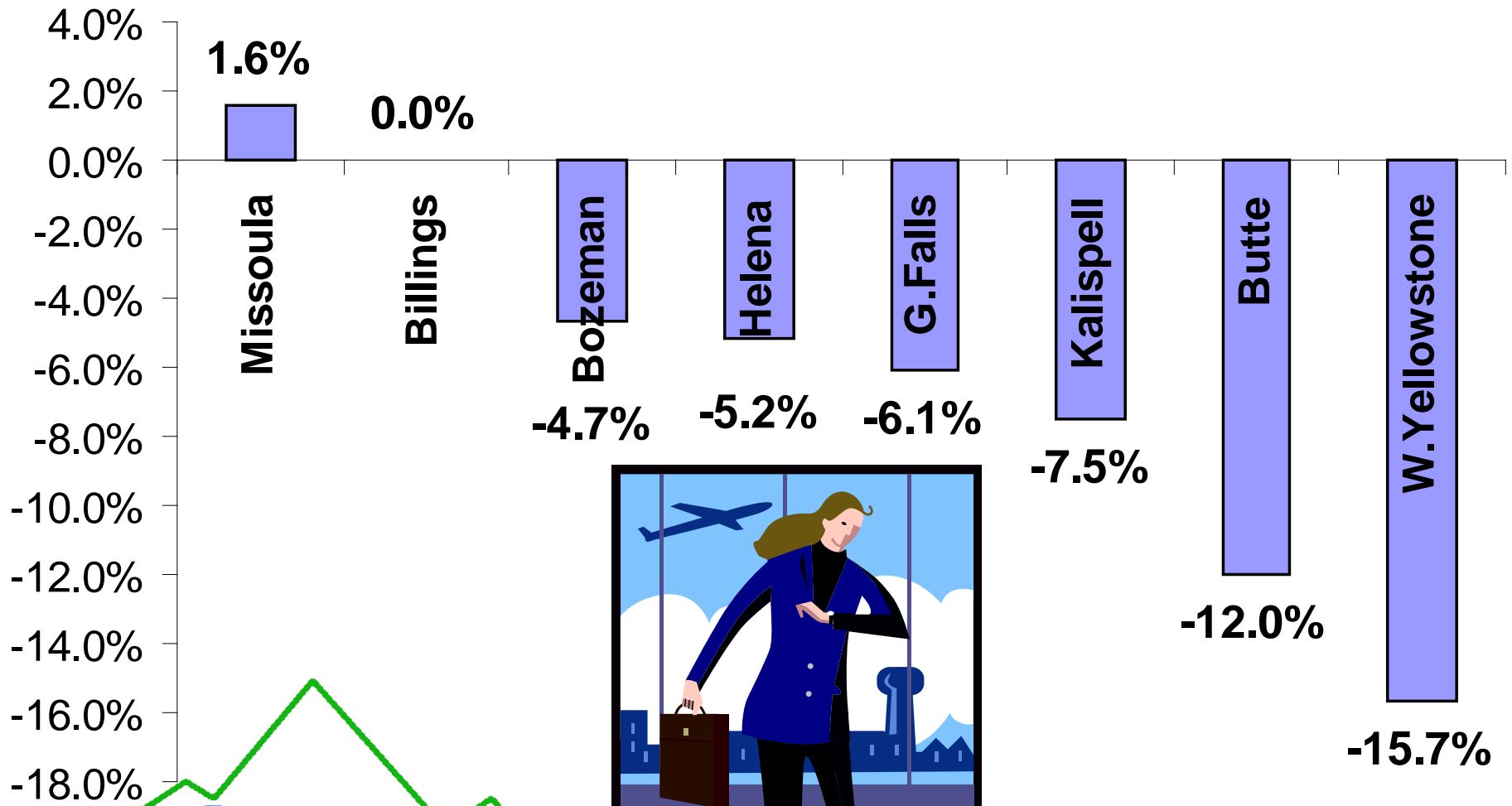
MT: 5% Increase



# 1997-2006 Montana Air Traffic



# 2006 Percent Change in Airport Deboarding by City



# 2007 Outlook



- 2% projected increase in U.S. Domestic Travel
- 2% projected increase in nonresident travel to Montana

Continued growth...more baby boomers each year have no kids at home hence more money and time to travel. This trend will probably continue for at least 20 years!

# Thank you!



Photo by Lee Rademaker

[www.itrr.umt.edu](http://www.itrr.umt.edu)

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# Top 5 Expenditure Breakdown by Travel Region

	<b>Yellow- stone</b>	<b>Glacier</b>	<b>Custer</b>	<b>Gold West</b>	<b>Russell</b>	<b>Missouri</b>
<b>Gas</b>	<b>25%</b>	<b>25%</b>	<b>28%</b>	<b>41%</b>	<b>28%</b>	<b>44%</b>
<b>Restaurant</b>	<b>23%</b>	<b>21%</b>	<b>21%</b>	<b>19%</b>	<b>22%</b>	<b>20%</b>
<b>Retail</b>	<b>14%</b>	<b>19%</b>	<b>18%</b>	<b>8%</b>	<b>19%</b>	<b>22%</b>
<b>Grocery</b>	<b>9%</b>	<b>10%</b>	<b>7%</b>	<b>7%</b>	<b>8%</b>	<b>6%</b>
<b>Hotel</b>	<b><u>11%</u></b>	<b><u>9%</u></b>	<b><u>8%</u></b>	<b><u>9%</u></b>	<b><u>10%</u></b>	<b><u>4%</u></b>
<b>Total \$</b>	<b>\$843m</b>	<b>\$768m</b>	<b>\$543m</b>	<b>\$352m</b>	<b>\$217m</b>	<b>\$33m</b>