



**Travel &
Recreation:
Jobs, Lifestyle, &
Growth**

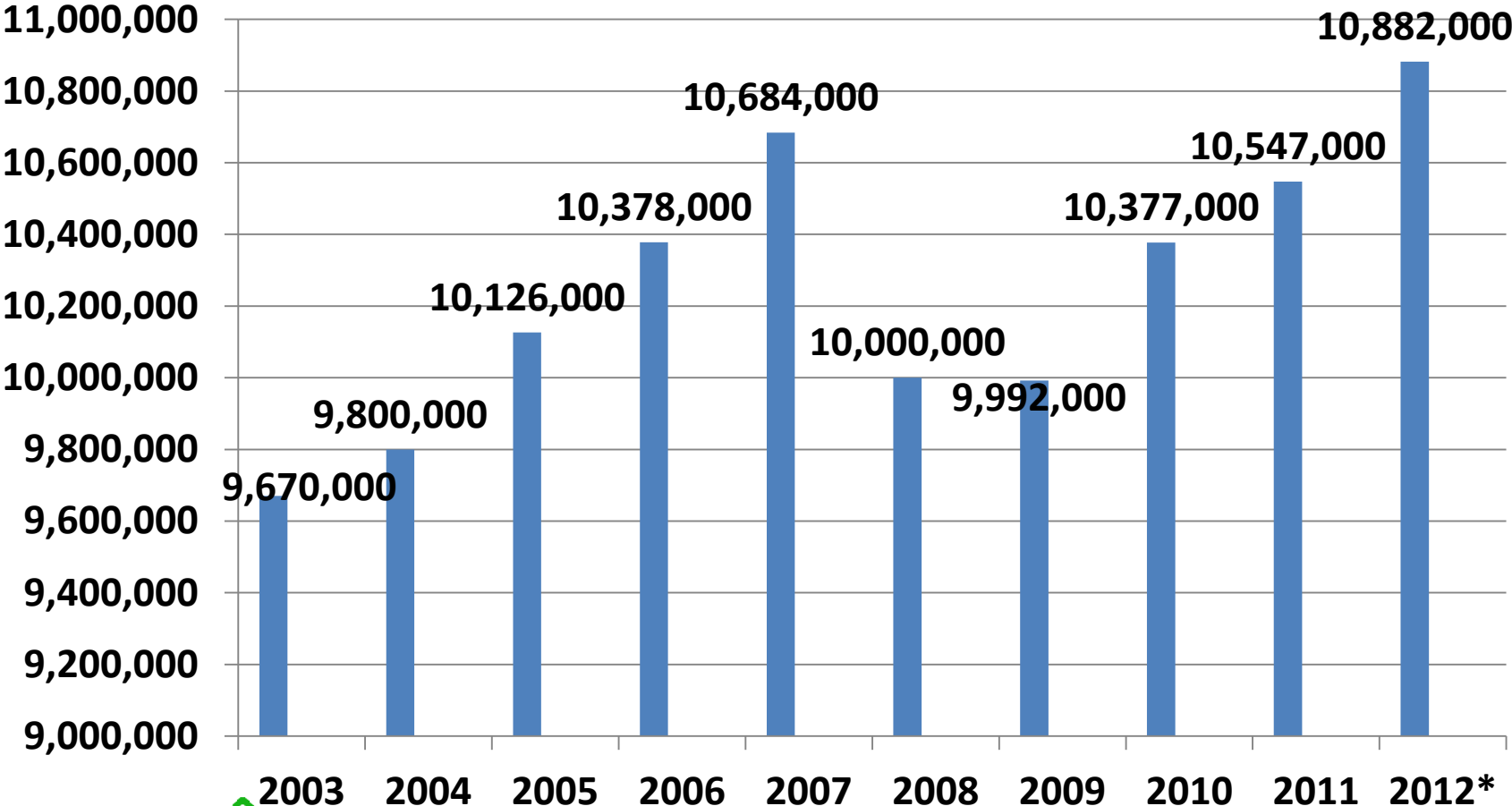
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Nonresident Visitors to MT

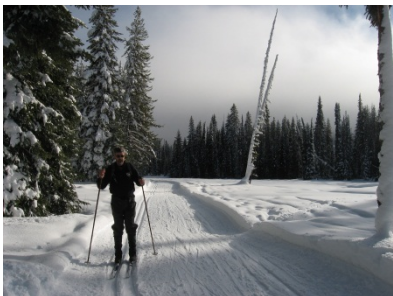


*preliminary



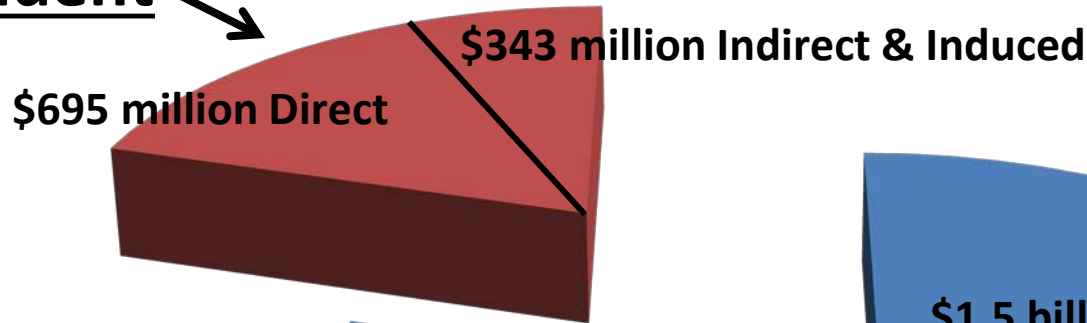
Yearly Resident Travel

- 15.4 million person- trips (> 50 miles from home)
- Residents spent \$833 million on pleasure trips
- \$1.03 billion in combined economic activity
- \$85/day trip; \$208/overnight trip

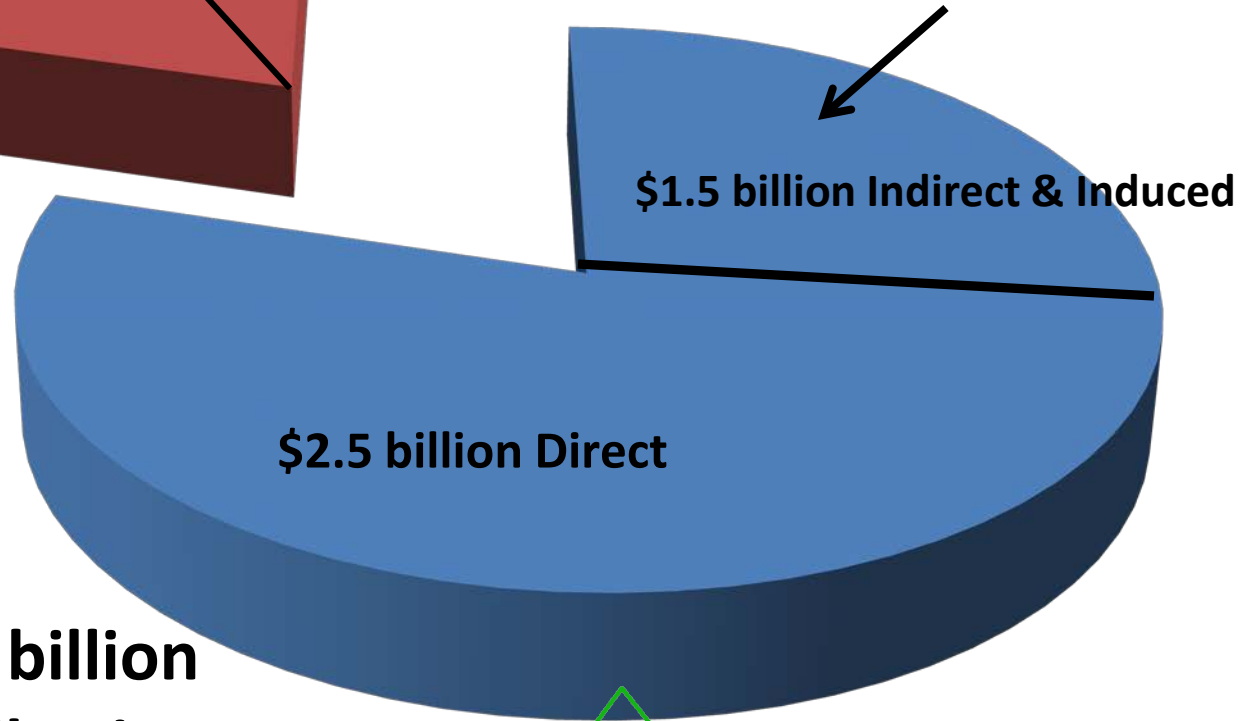


2012 *Preliminary* Economic Contribution of Travel: Nonresident & Resident

Resident



Nonresident



**Combined: \$5.1 billion
Economic Contribution
to Montana in 2012**

Nonresident travel supports 42,860 jobs

Resident travel supports 11,830 jobs

54,690 jobs

-
- rancher
 - second hand store
 - Auto repair
 - U pick farm
 - Construction & meat processing
 - Realtor
 - student
 - Art gallery
 - FWP
 - Electrician building new homes
 - Built2nd homes
 - grocery store
 - RV repair
 - Yoga instructor
 - cafeteria
 - teacher
 - self employed artist
 - health care
 - Ski patrol
 - Check Cashing Business
 - campground
 - wrecker
 - insurance agent
 - car dealer
 - Fisheries Biologist
 - cherry orchard stand
 - Historic Preservation Board
 - Play in a band
 - Massage Therapist
 - Univ. Administrator
 - carpenter
 - park department
 - farmer self employed
 - maintenace job
 - Forest service
 - Housekeeping
 - wait staff
 - Publisher
 - Casino, subway, pizza delivery
 - snowmobile trail grooming
 - Service tech for coca cola
 - Wildlife conservation
 - fair

People choose to live/work in Montana because...

Looking for a town with no traffic report, clean air, simple life, and kind people....

It wasn't the job at first but the lifestyle. As I grew with the business and eventually became a partner, the job came more into play, but then so did the lifestyle.

A summer job in Yellowstone brought me here, then I fell in love with Montana. I transferred to a Montana college and tourism marketing became my career.

The vast open space, quality of air and water.

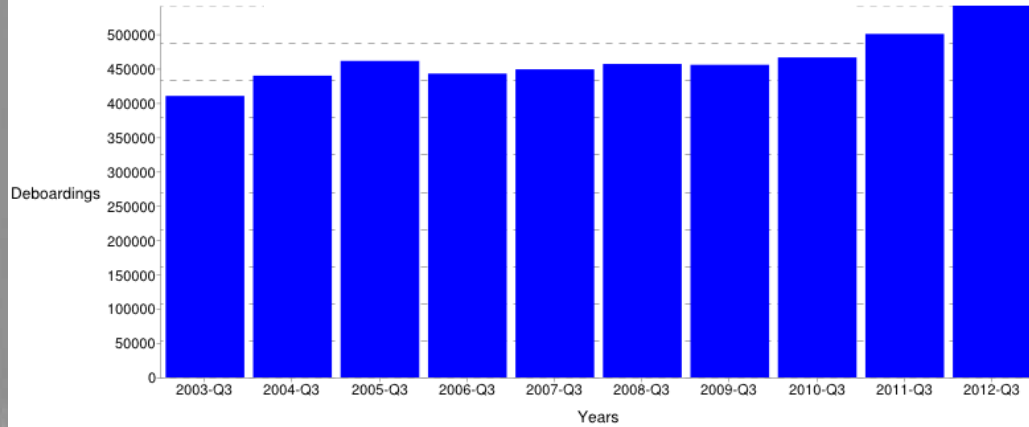
My wife and I thought it was a good combination of our favorite places in the world, there was plenty of business opportunity and a great place to raise a family.

I love to fly fish!

Travel Trends

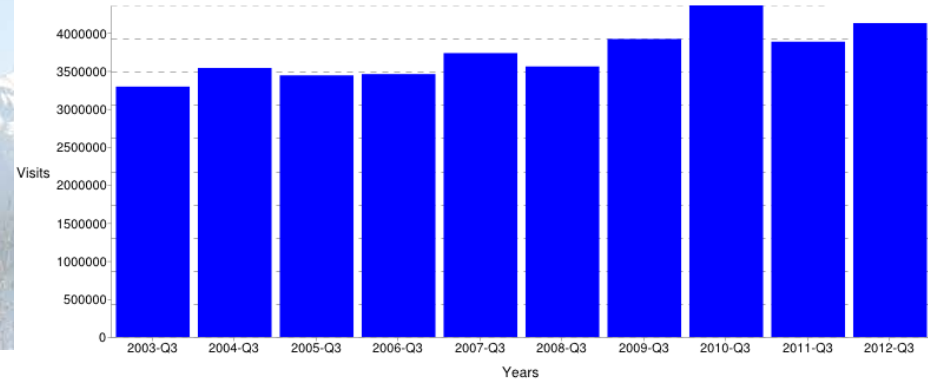
Airport Deboardings 3rd Q

+8%



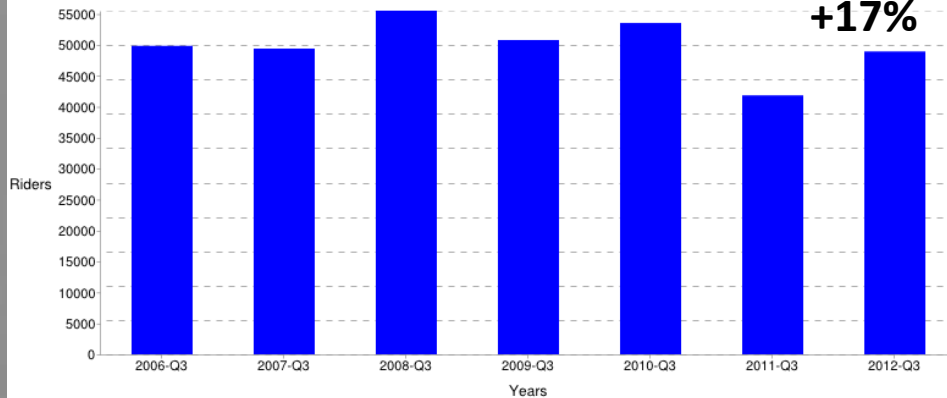
Nat'l Park System 3rd Q

+6%



Amtrak Deboardings 3rd Q

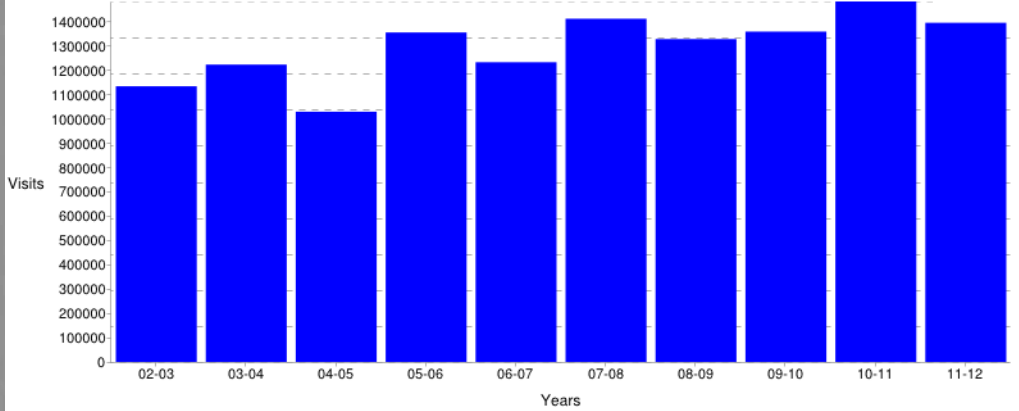
+17%



Travel Trends

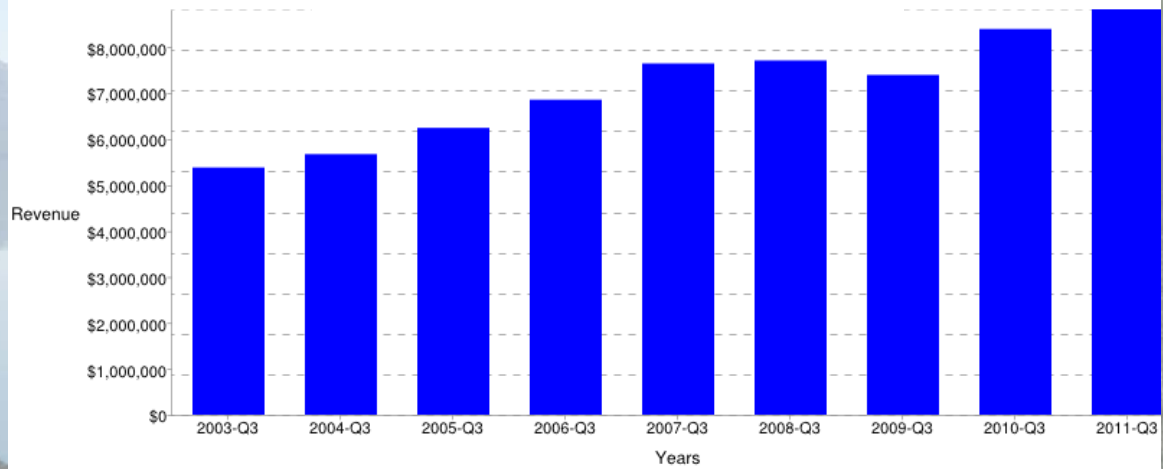
Skier Visits

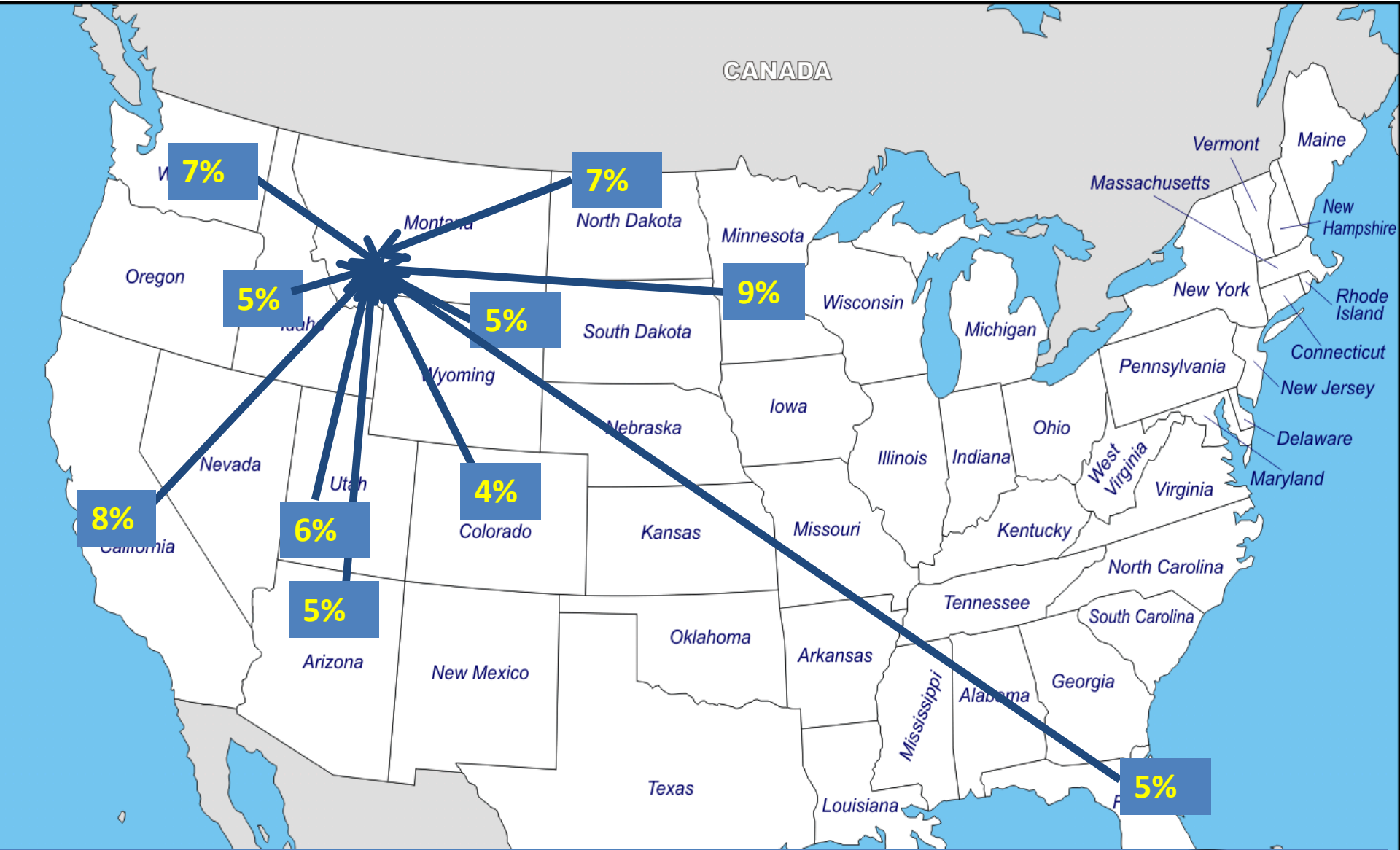
-6%



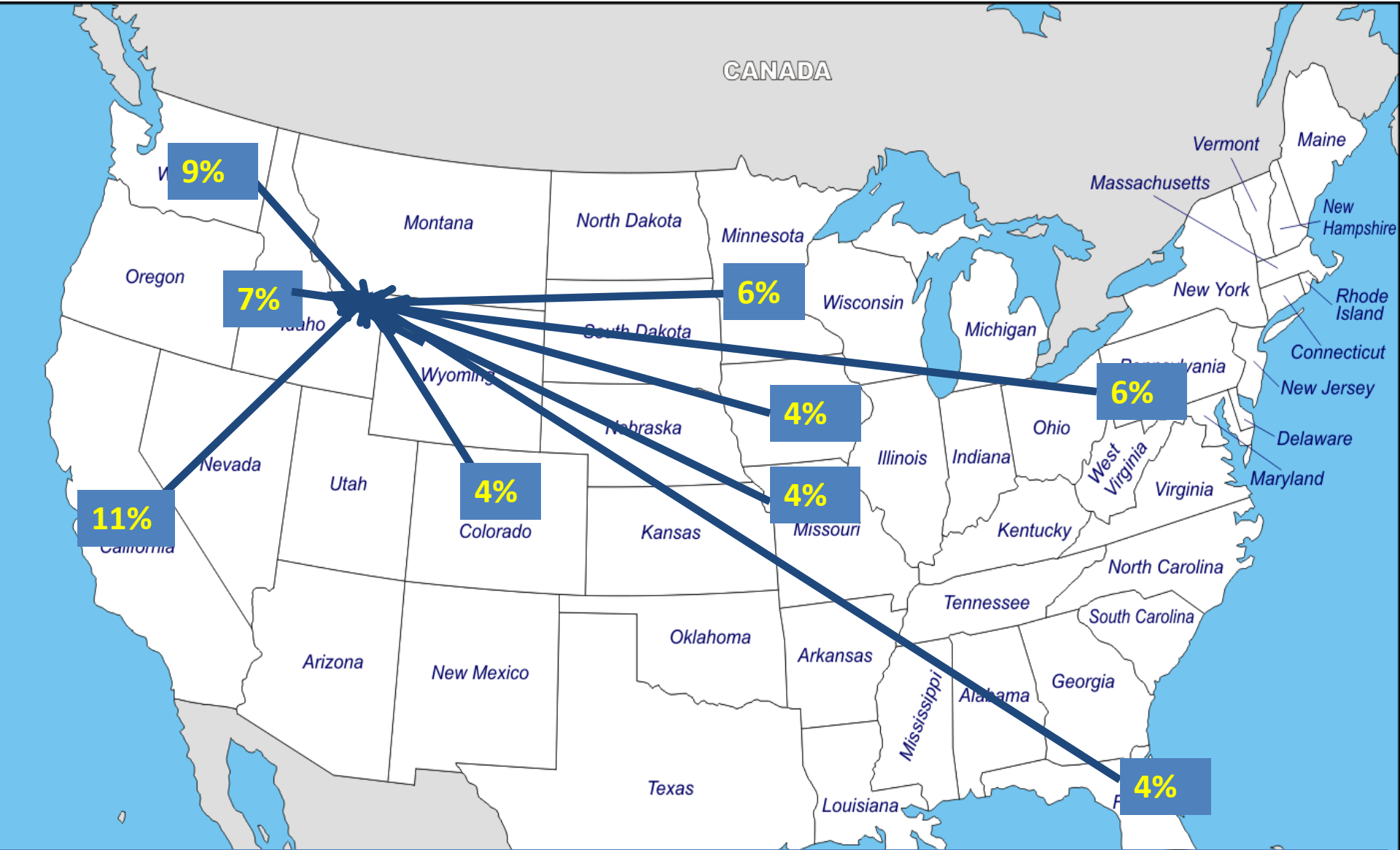
Bed Tax Collections 3rd Q

+5%





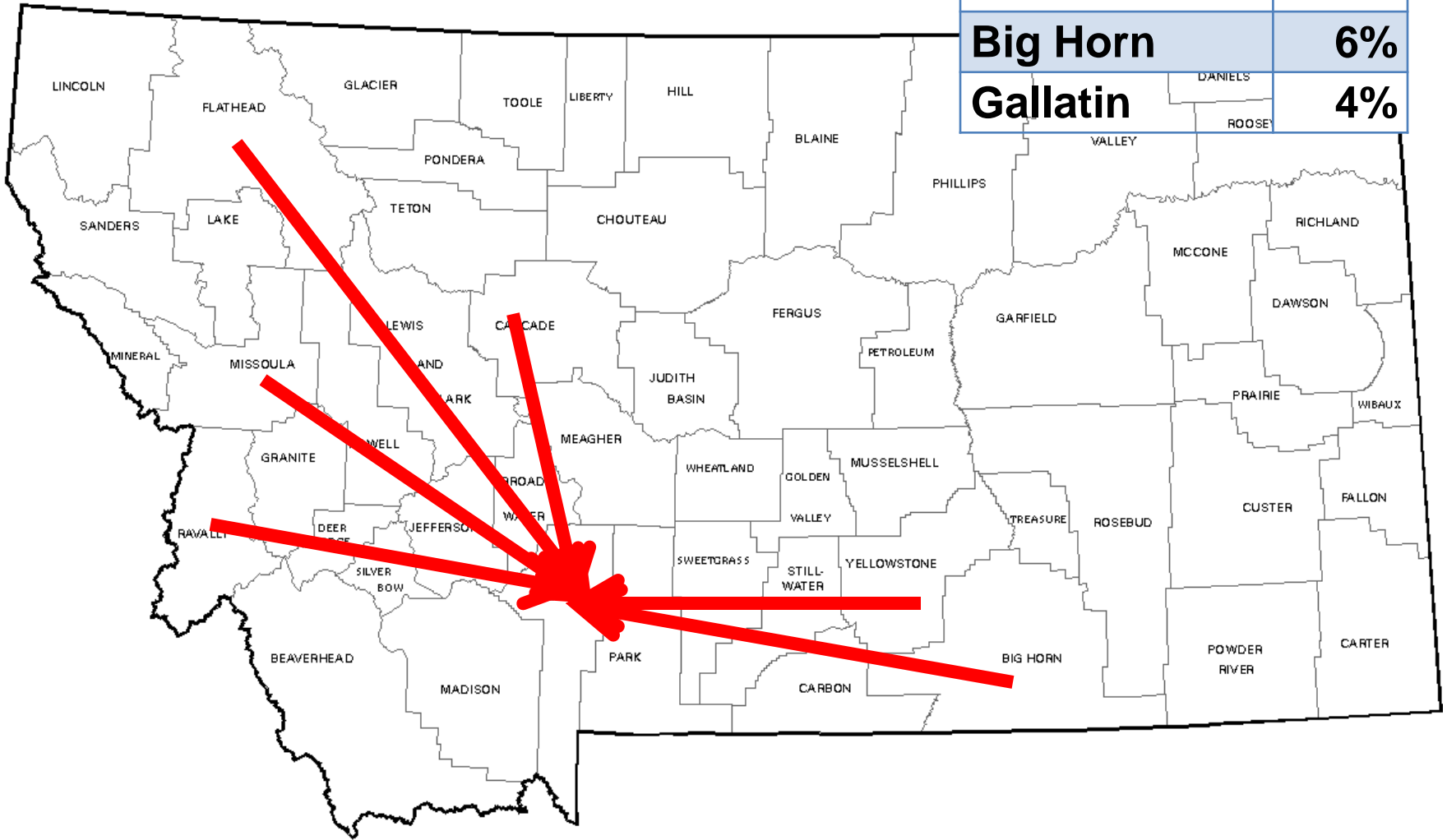
57% of nonresidents who spent a night in Bozeman came from these 10 states and Alberta (2012, Q1-3).



55% of nonresidents who spent a night in West Yellowstone came from these 9 states (2012, Q1-3).

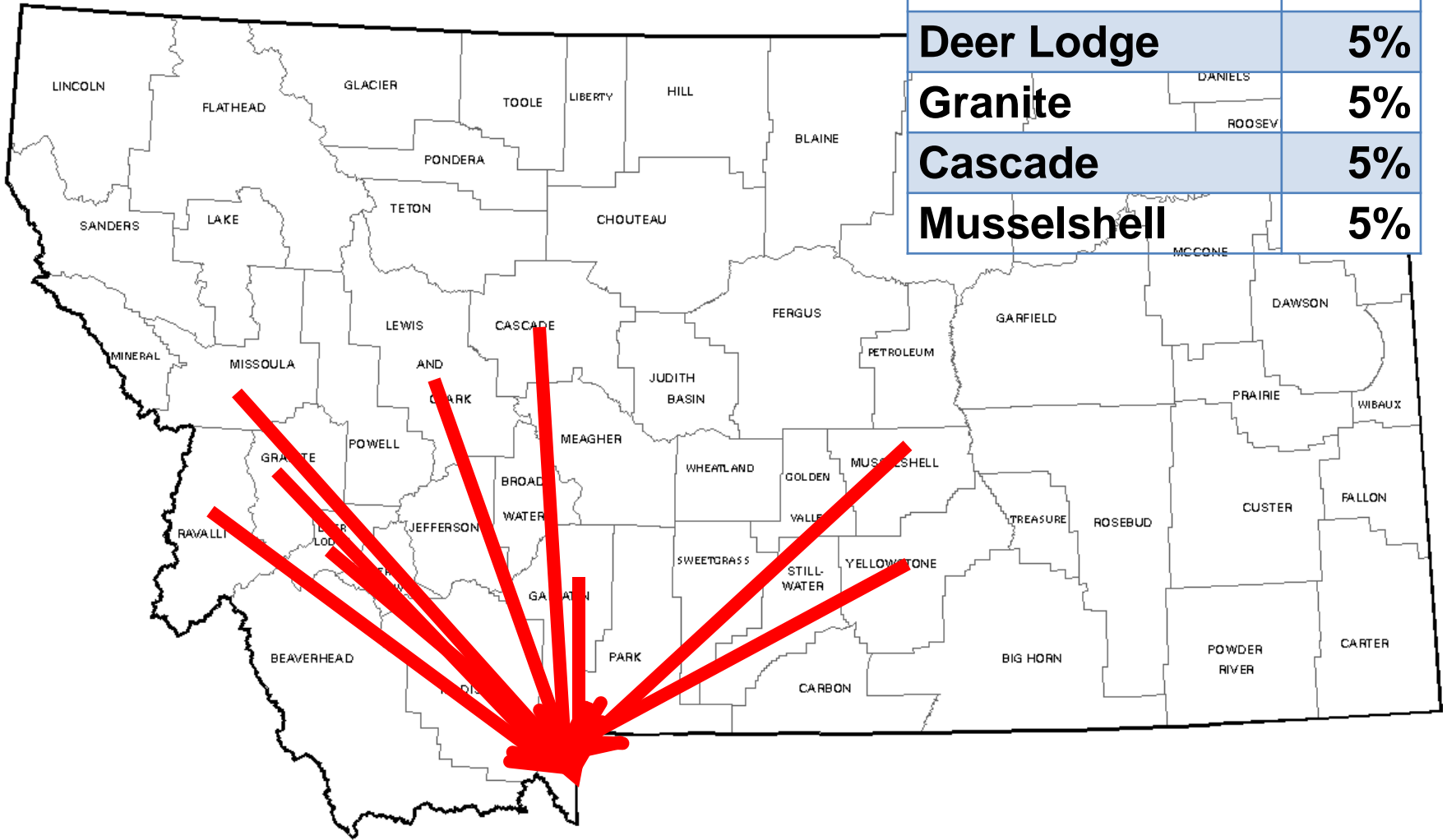
Where residents are from who stay overnight in **Bozeman**

| | |
|--------------------|------------|
| Yellowstone | 24% |
| Flathead | 12% |
| Cascade | 8% |
| Missoula | 7% |
| Ravalli | 6% |
| Big Horn | 6% |
| Gallatin | 4% |



Where residents are from who stay overnight in West Yellowstone

| | |
|------------------------|------------|
| Yellowstone | 21% |
| Gallatin | 16% |
| Lewis and Clark | 8% |
| Missoula | 6% |
| Ravalli | 5% |
| Deer Lodge | 5% |
| Granite | 5% |
| Cascade | 5% |
| Musselshell | 5% |



2013 Outlook

- Consumer confidence improving
- US Travel spending at record level (\$846.7 billion in 2012 vs \$545 billion in 2002).
- Overseas travel to US setting new records (29.2 million in 2012; 19.1 million in 2001)
- Hotel room demand is at an all time high (+3%)
- Restaurant industry on the incline (+3.5%)
- Gas prices on the way down (for now)
- 2% increase in nonresident travelers to MT
- 4% increase in traveler spending in MT



**THANK
YOU!**



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