

# Soaring, Gliding, or 'Bumpy Ride'?

## Changes in Tourism

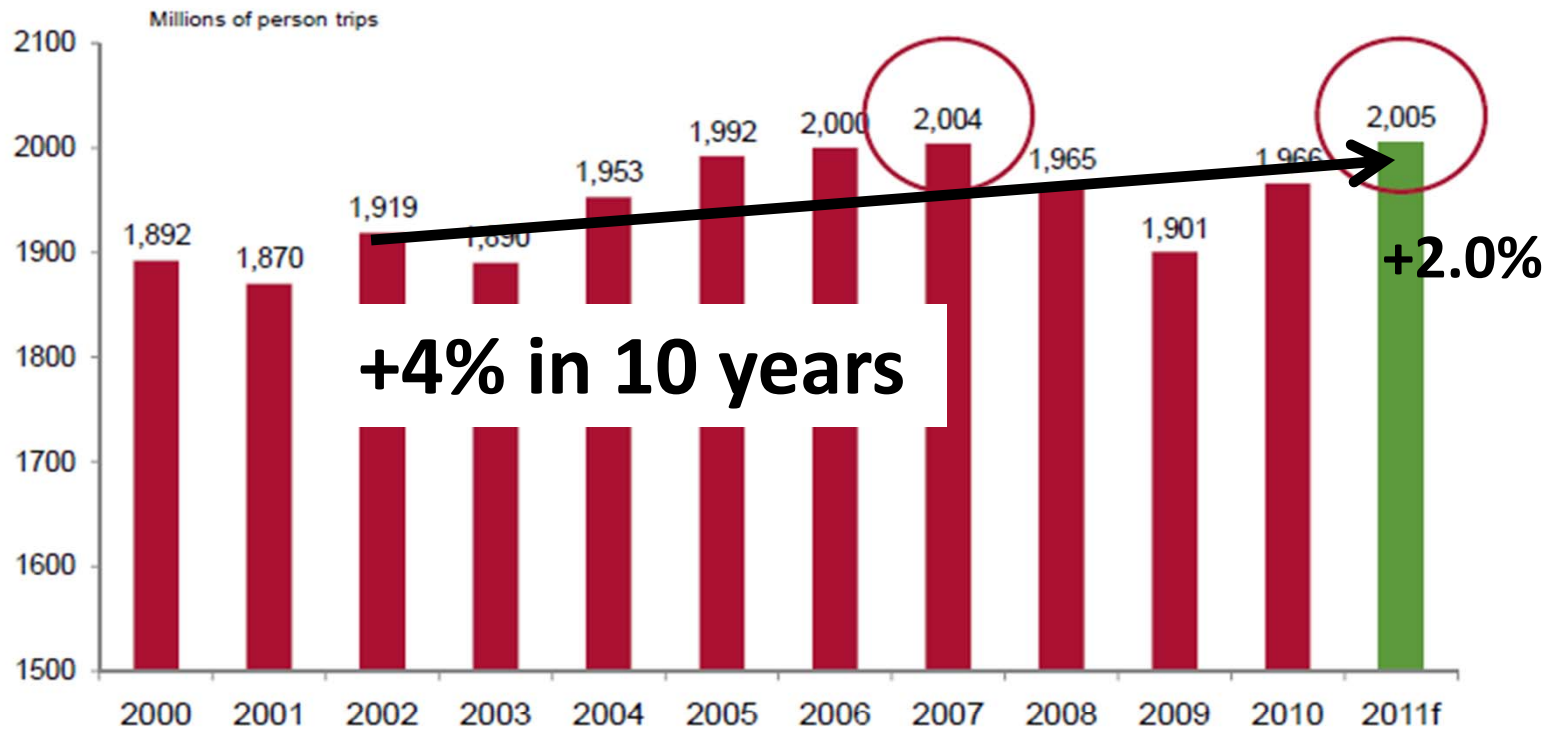
Norma Nickerson, Director  
Institute for Tourism and Recreation Research  
University of Montana



## 2012 Annual Outlook Seminar



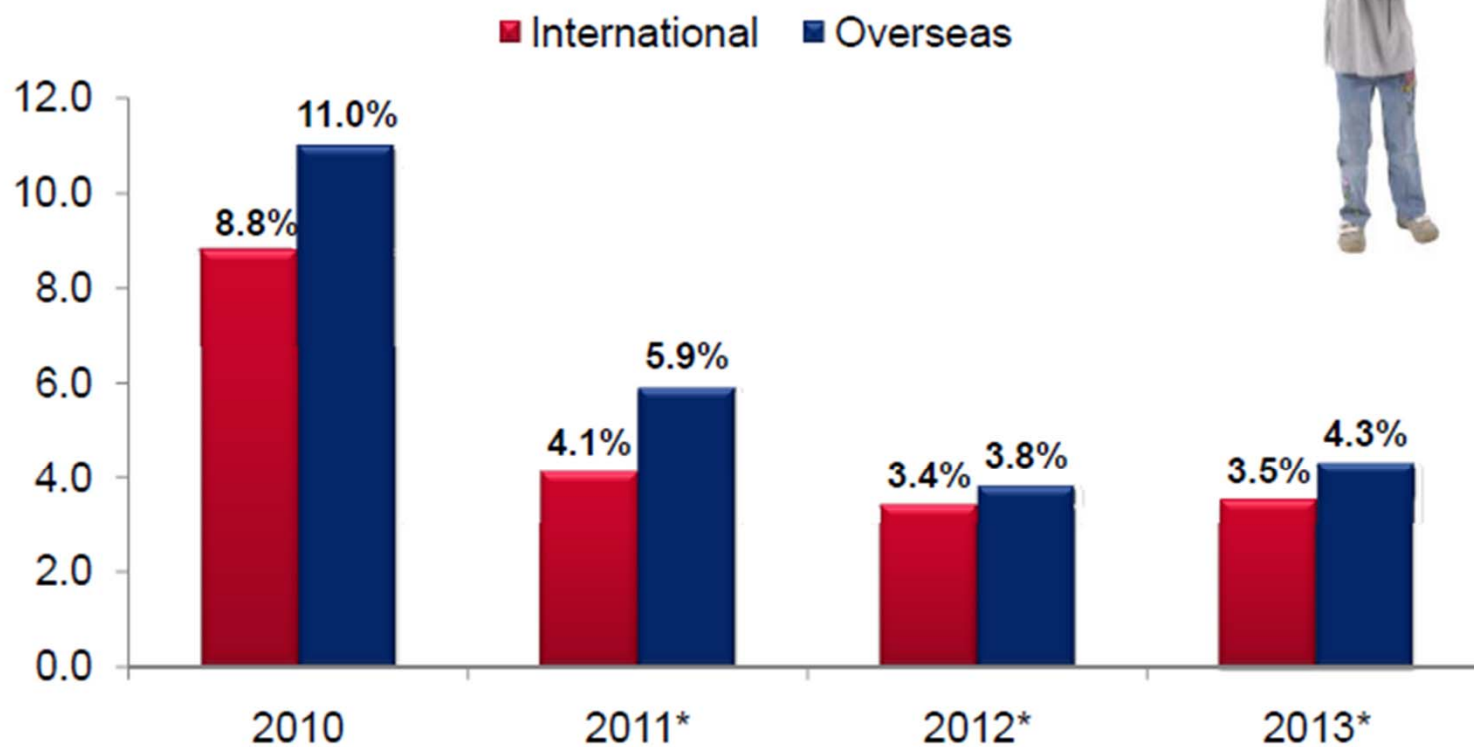
# Total Domestic Visitors in the United States *Expected to exceed record slightly in 2011*



Forecast as of October 2011

Source: U.S. Travel Association and Tourism Economics

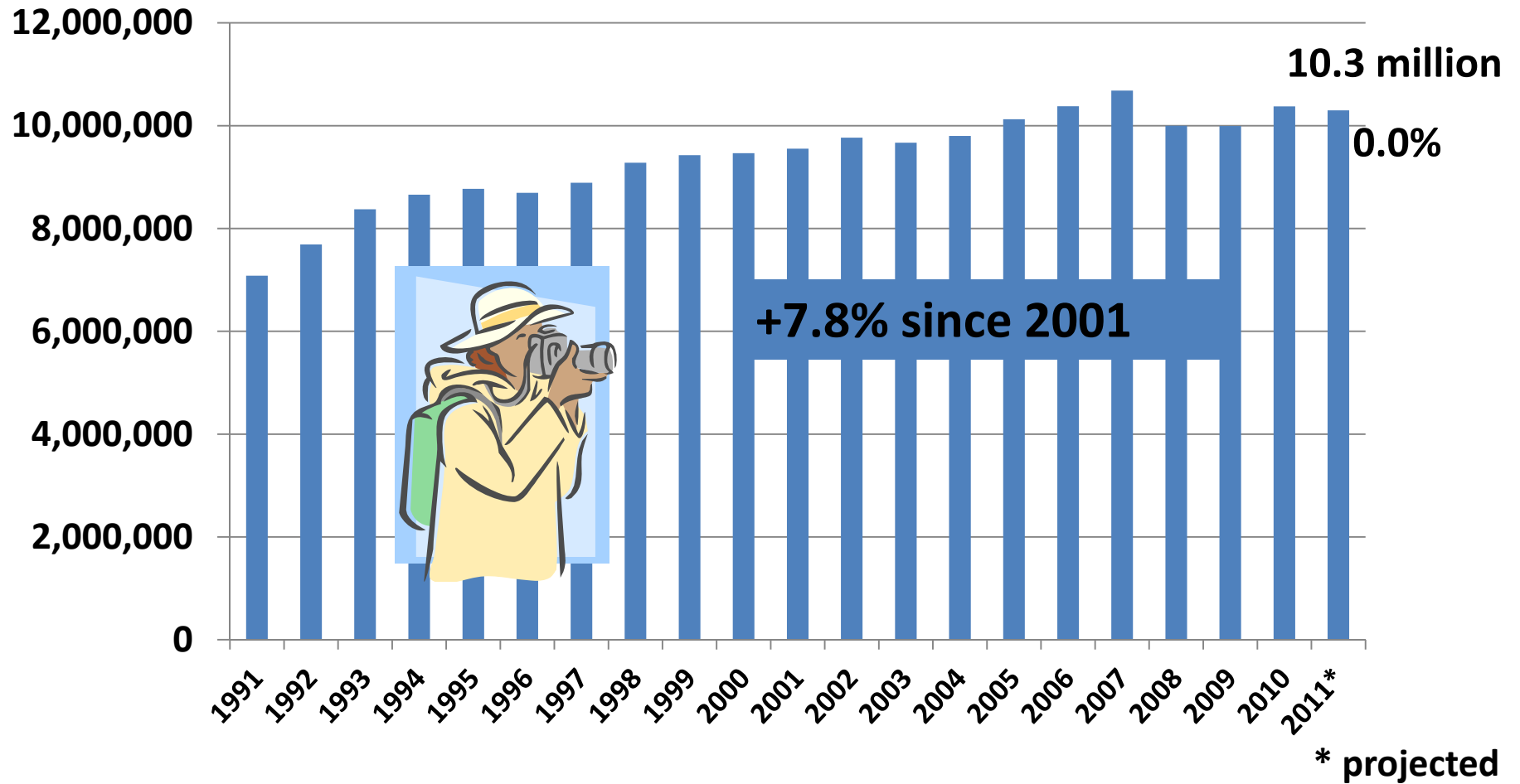
# International and Overseas arrivals - slowing growth expected



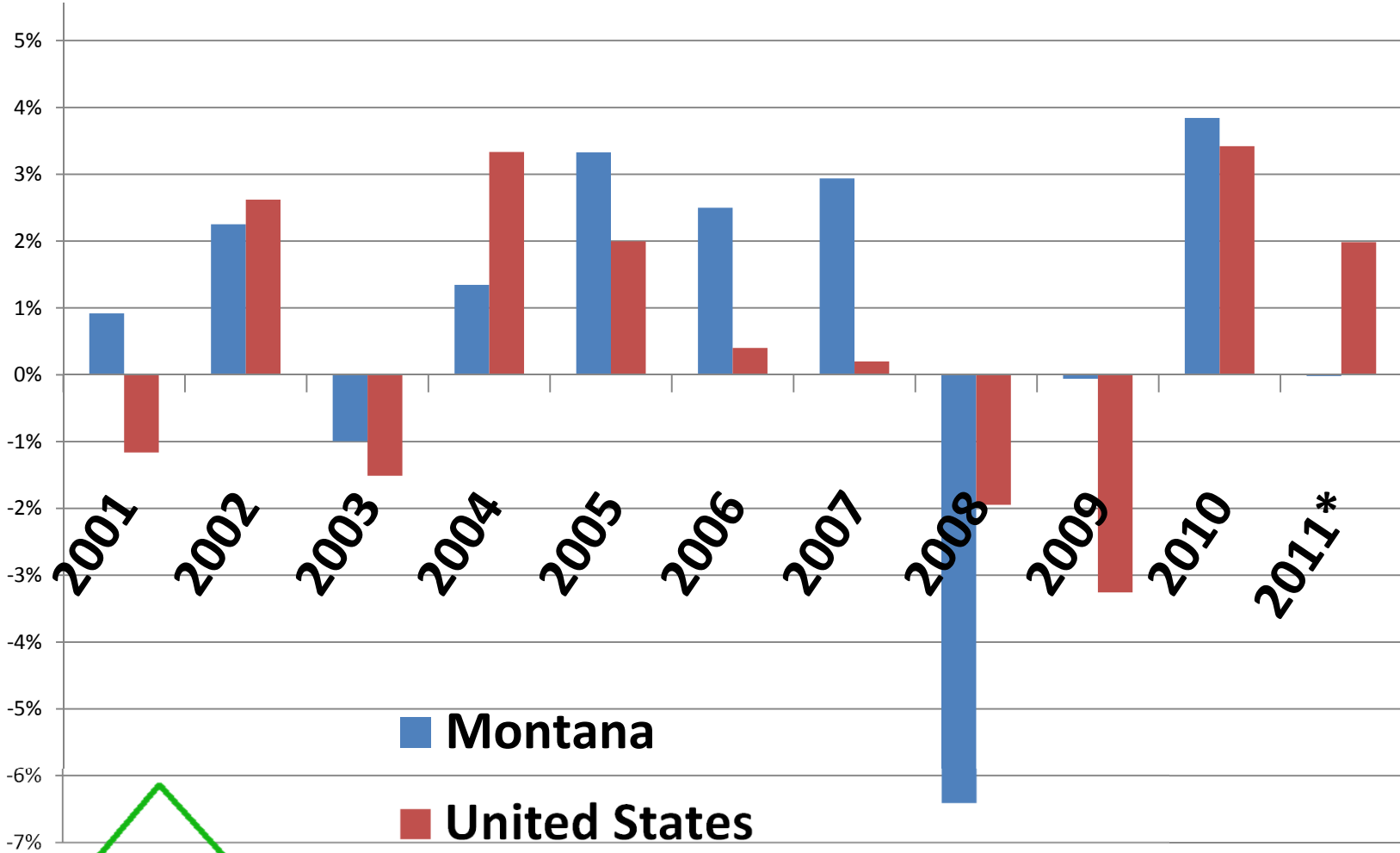
\*Forecasts as of October 2011

Source: U.S. Travel Association; Tourism Economics

# MT Nonresident Visitation: 1991-2011



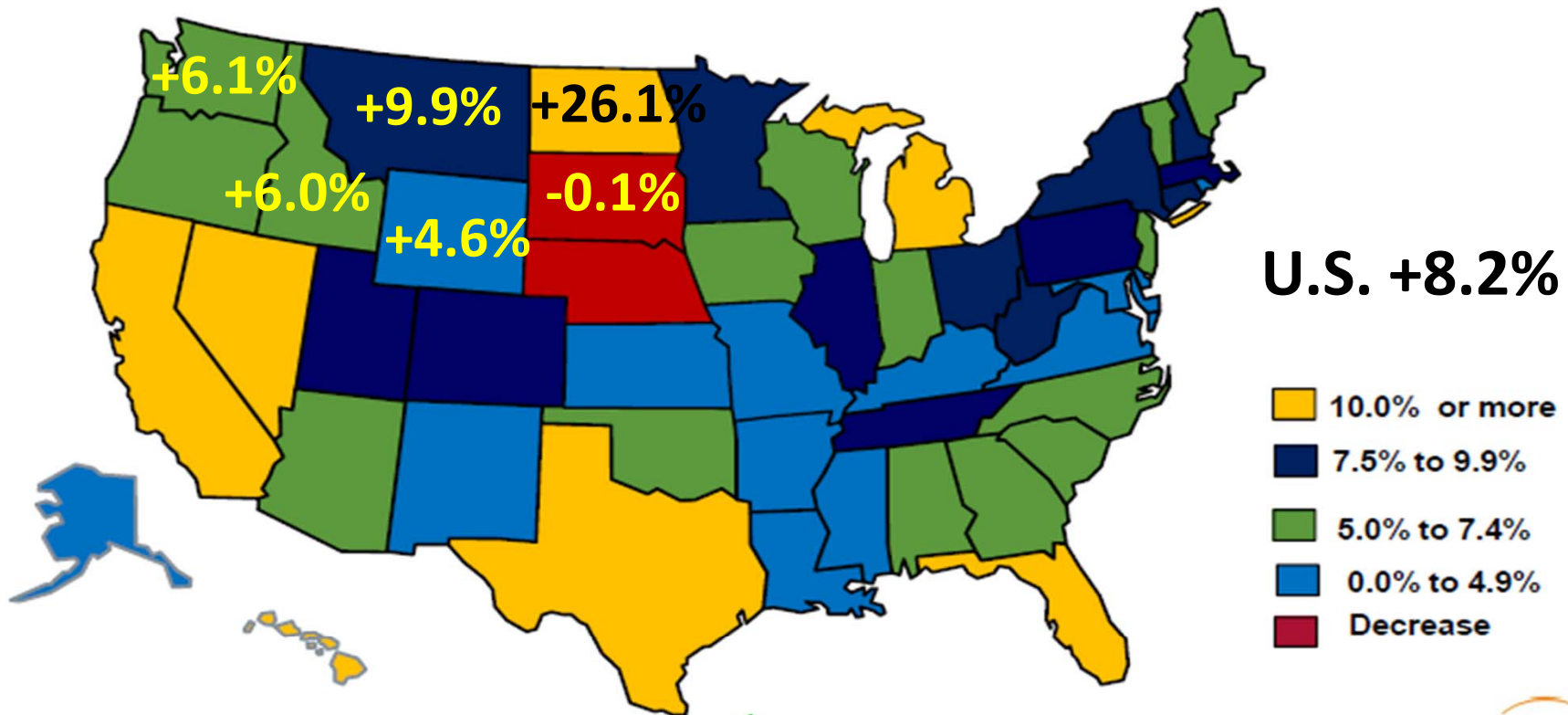
# Percent Change in Montana and US Visitation



**Institute  
for  
Tourism and  
Recreation  
Research**



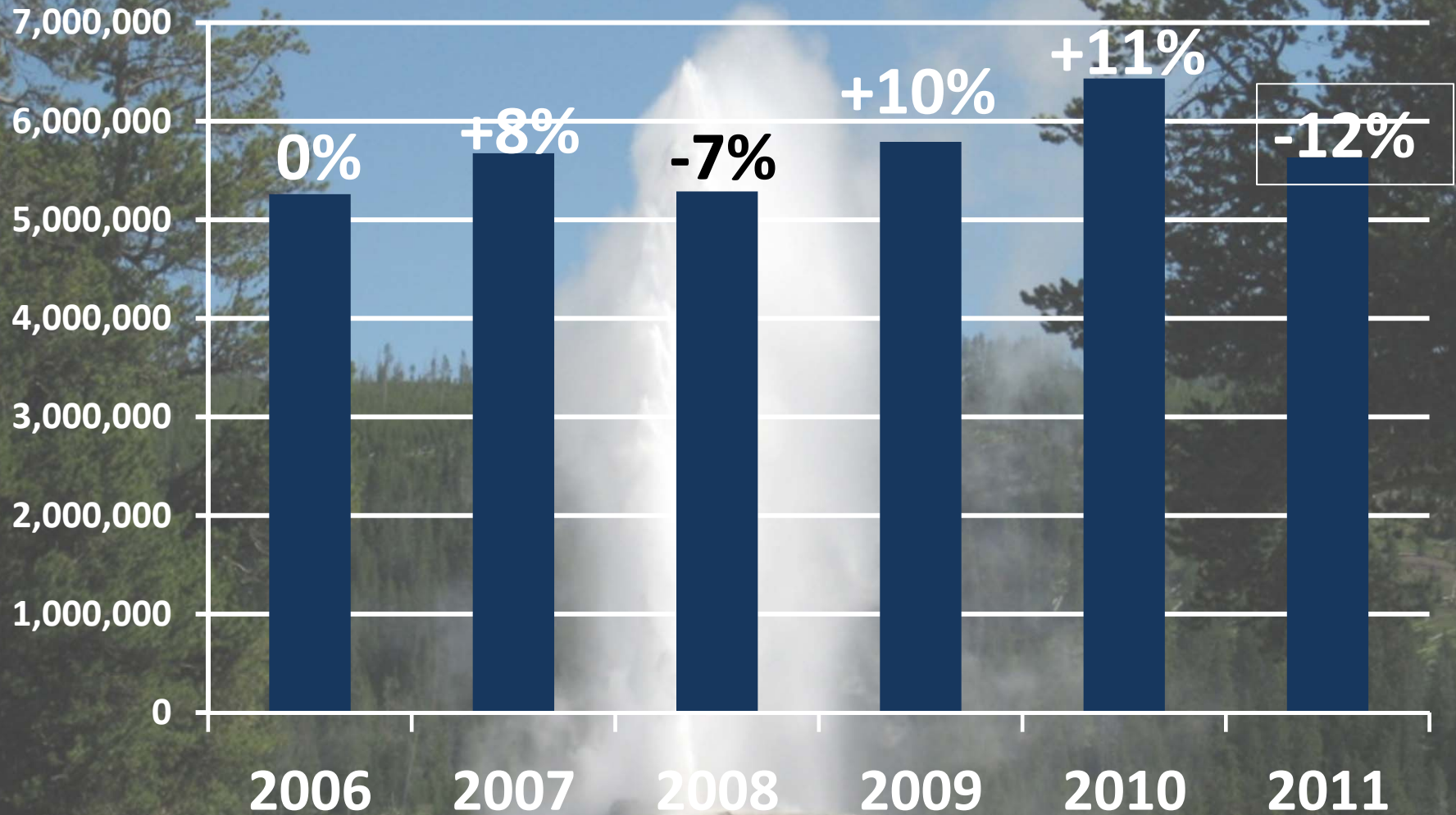
# % change in RevPAR through November 2011 - *Getting better*



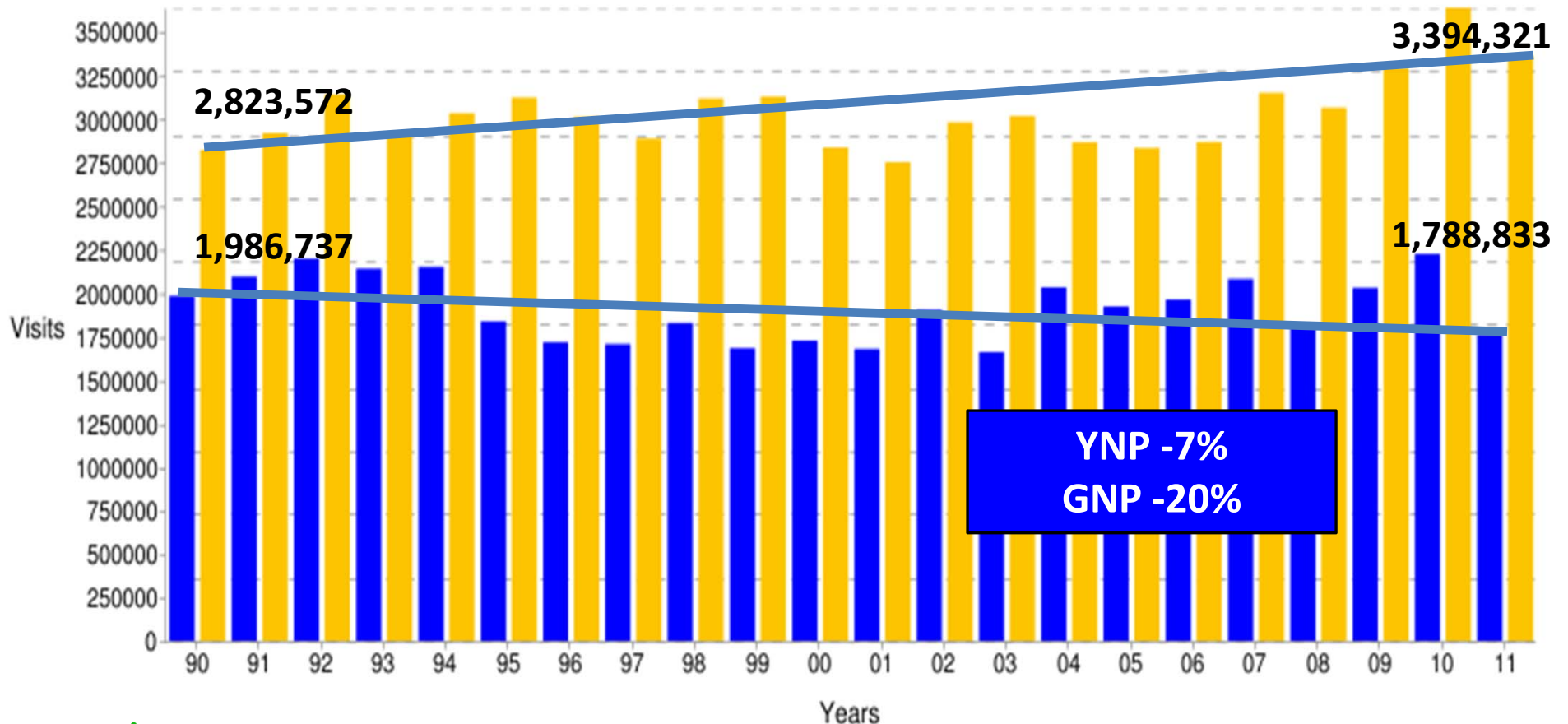
Source: Smith Travel Research, Oct. 2011



# Montana National Park System Visits January - October: 2006-2011



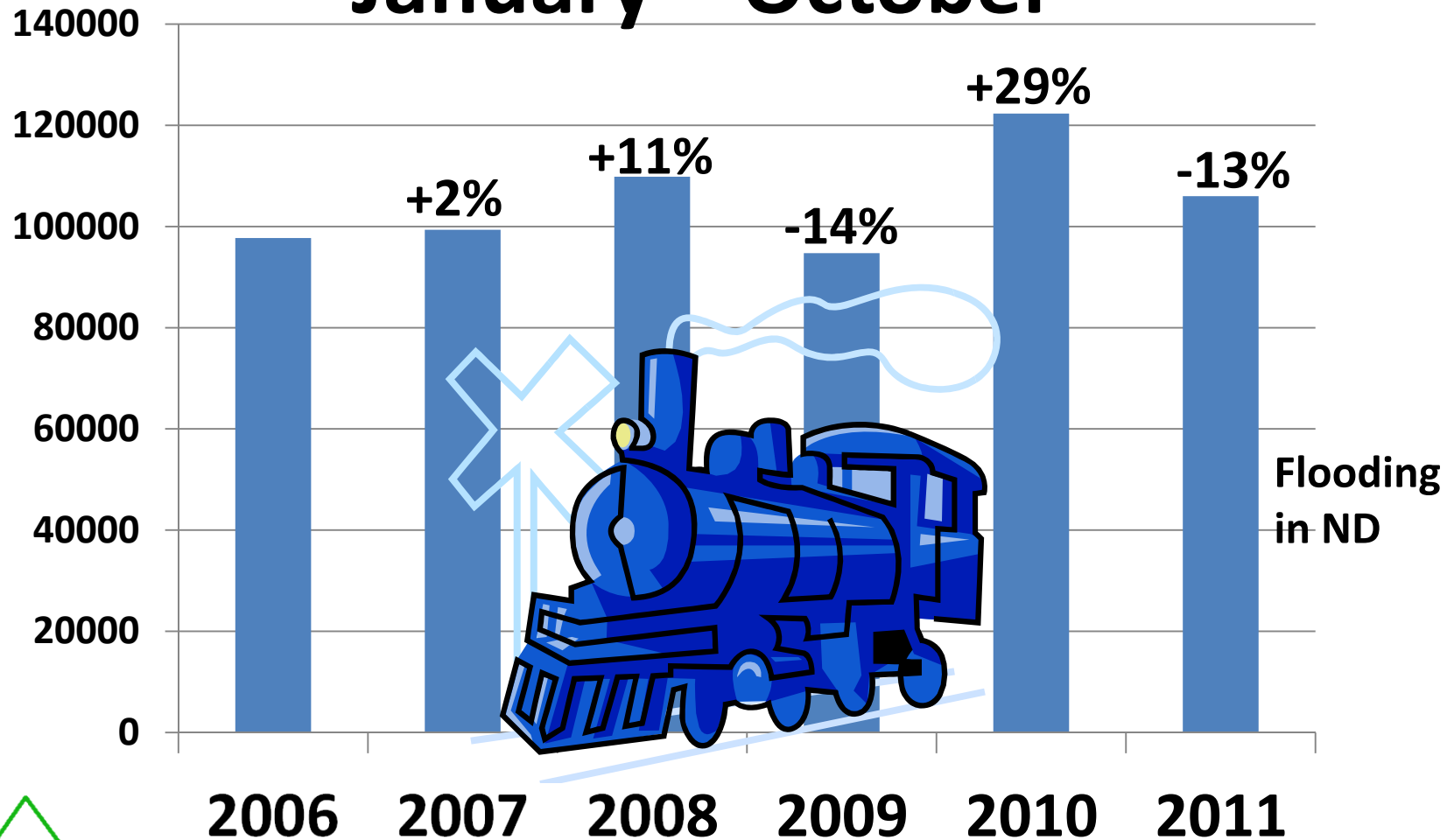
# Glacier & Yellowstone National Parks 1990-2011





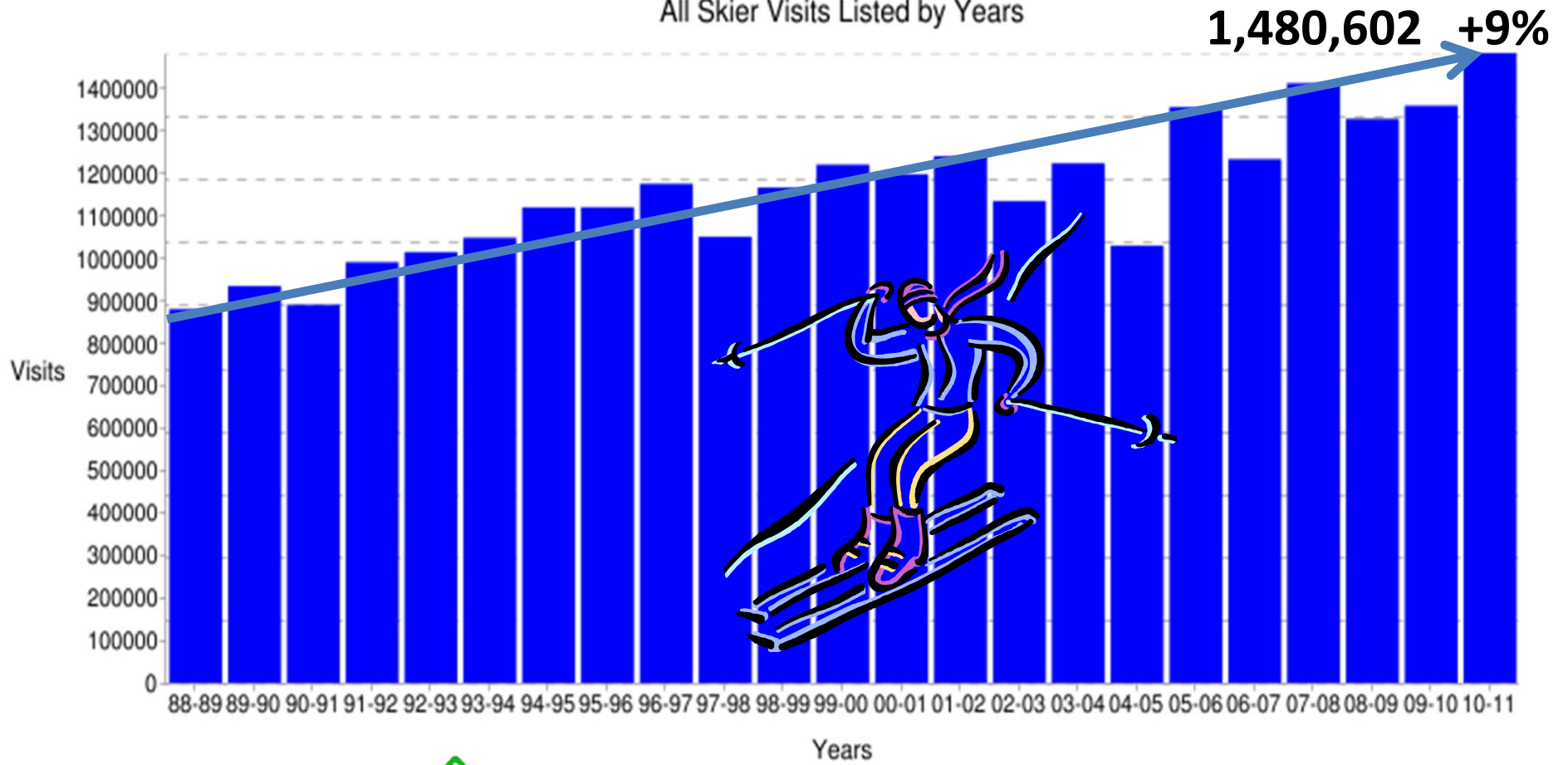
# Amtrak deboardings 2006-2011

## January – October

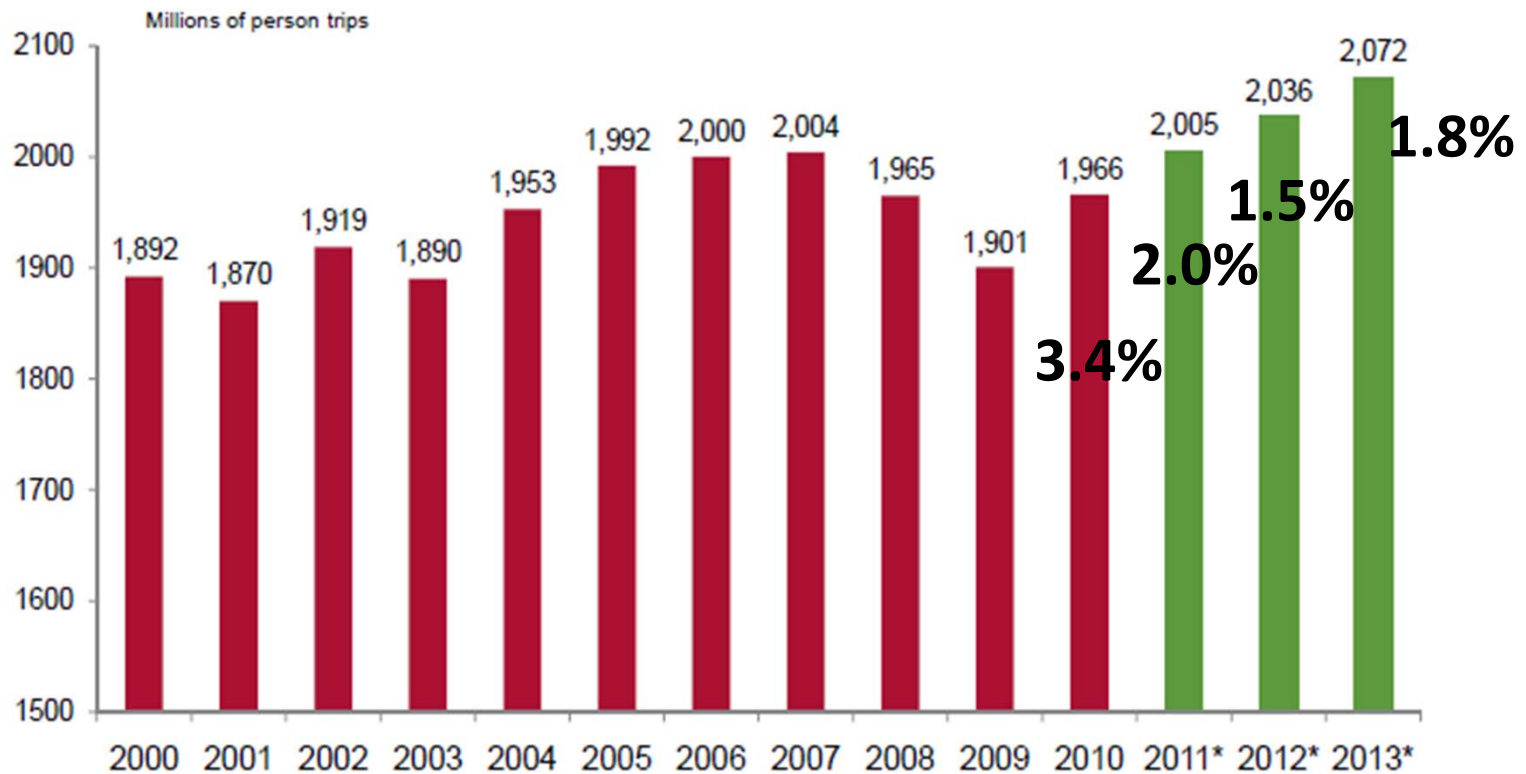


# MT Skier Visits: 1988 - 2011

All Skier Visits Listed by Years



# Total Domestic Visitors... United States



Forecasts as of October 2011

Source: U.S. Travel Association and Tourism Economics

# 2012 MT Tourism Businesses

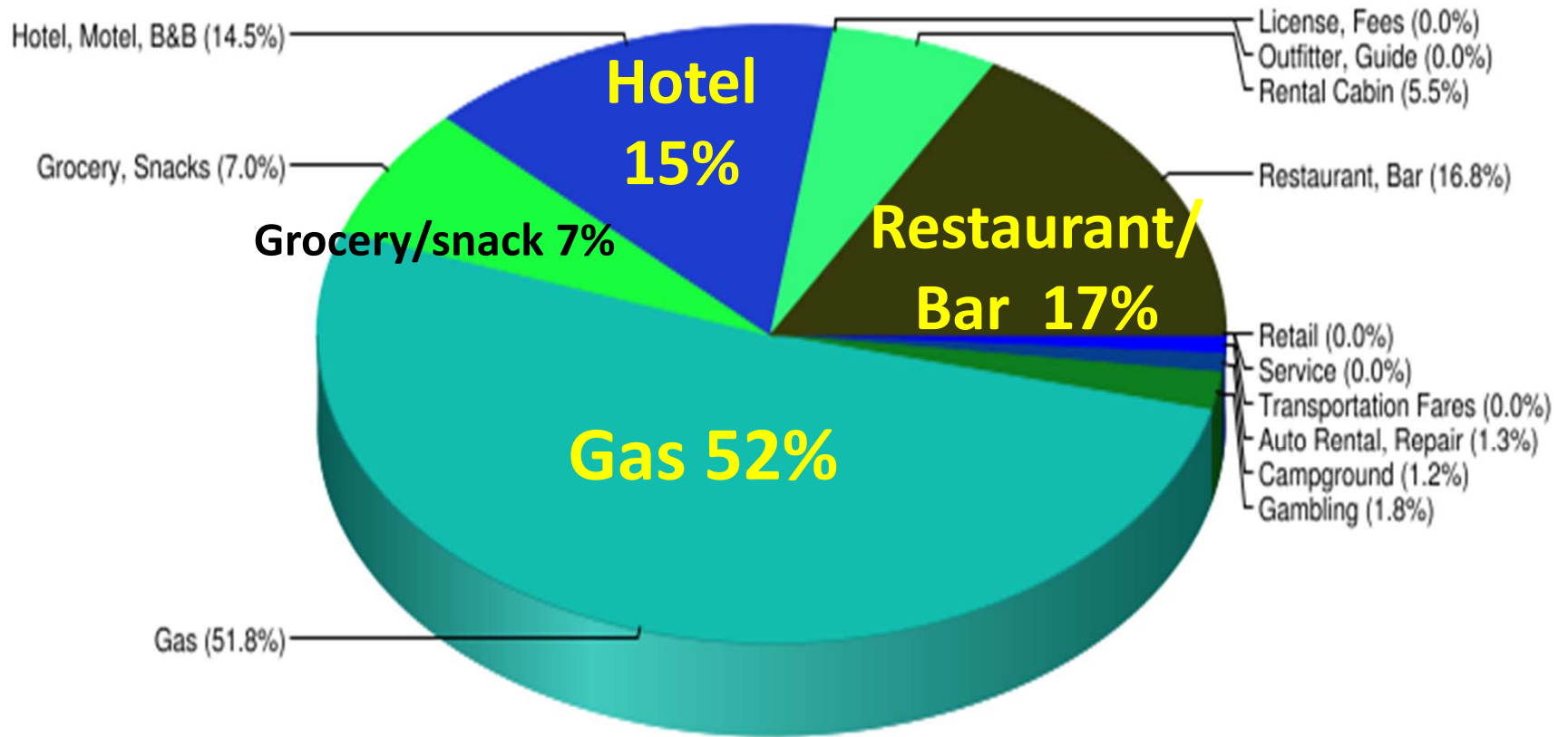
- 48% expect growth in 2012
- 40% expect to stay the same
- Overall: 2% growth expected in 2012

## 2012 National Tourism

- 1.5% growth in domestic visitors
- 3.4% growth in International visitors
- 3.8% growth in overseas visitors



# Fergus County Nonresident Expenditures 2010

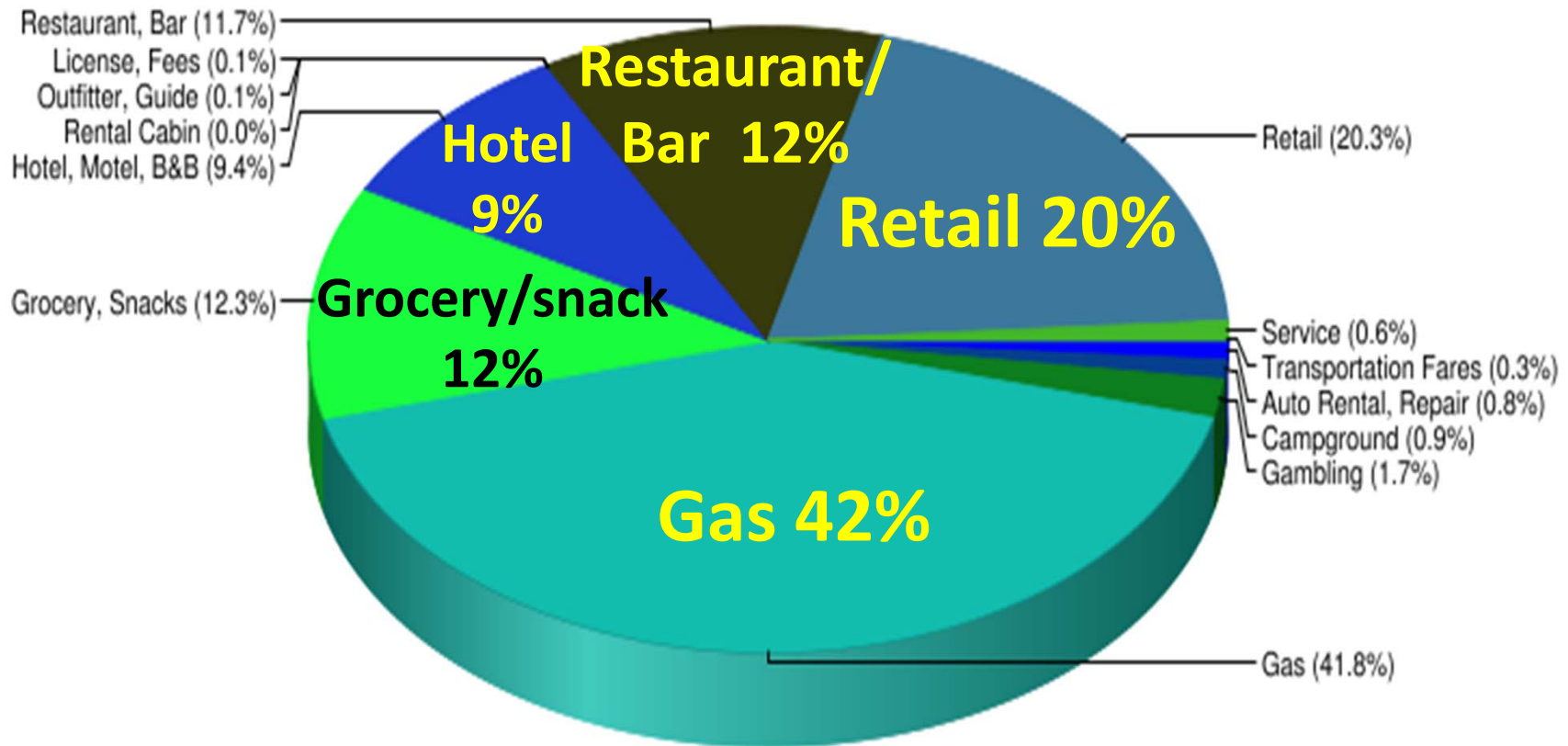


**\$5 Million**

**0.2% of statewide nonresident spending**



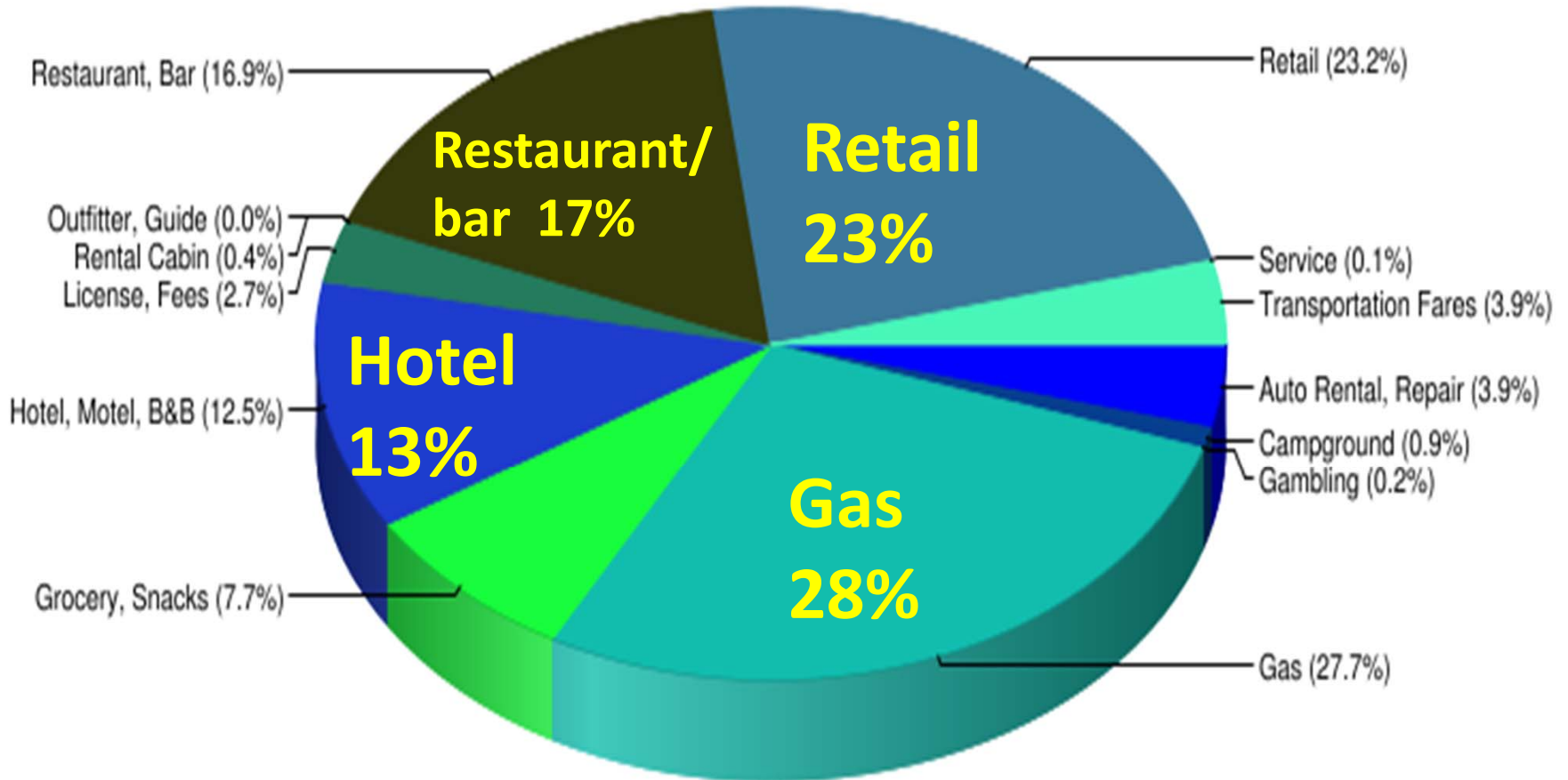
# Hill County Nonresident Expenditures 2010



**\$49 Million**

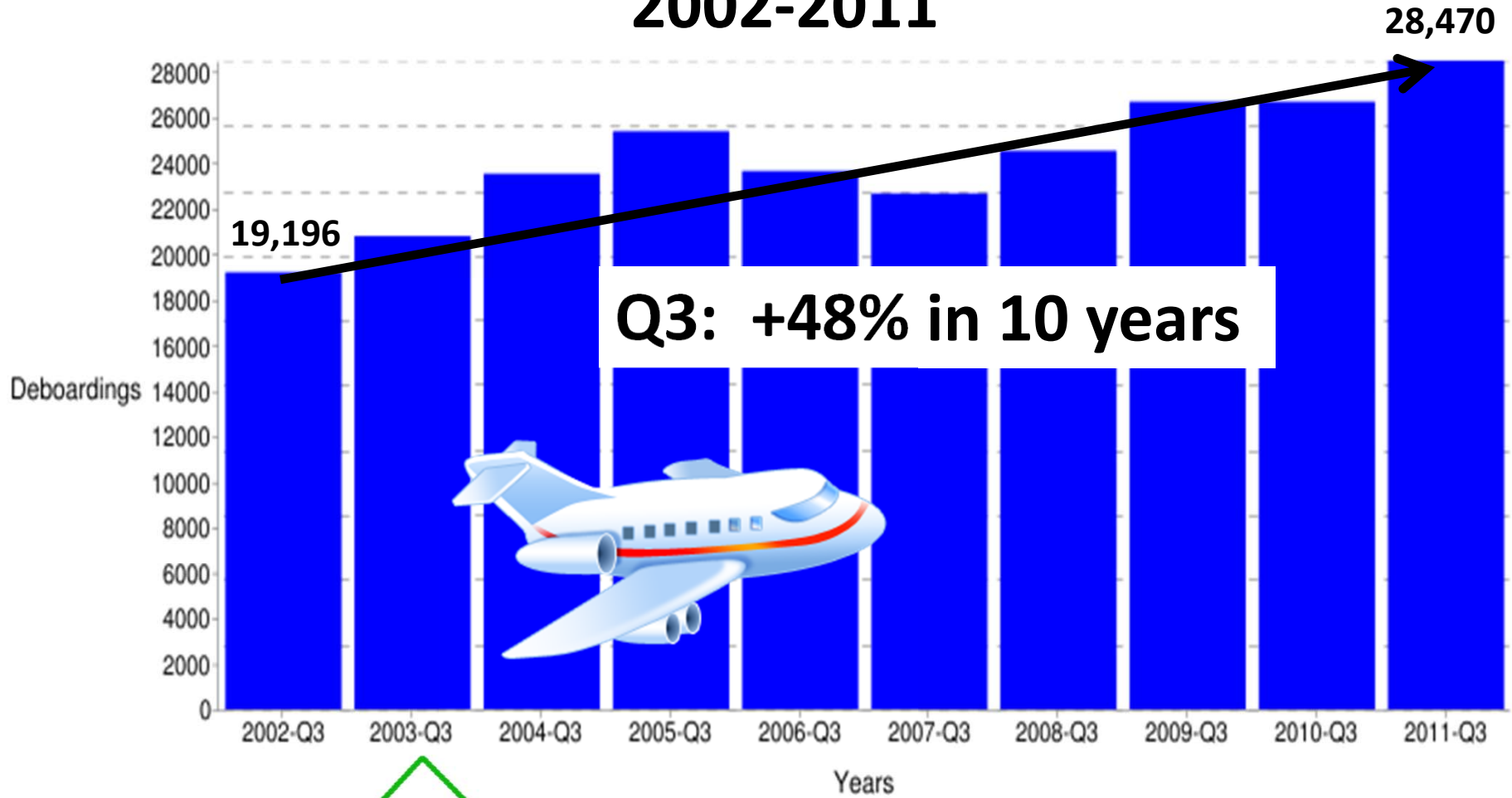
**2% of statewide nonresident spending**

# Lewis & Clark County Nonresident Expenditures 2010

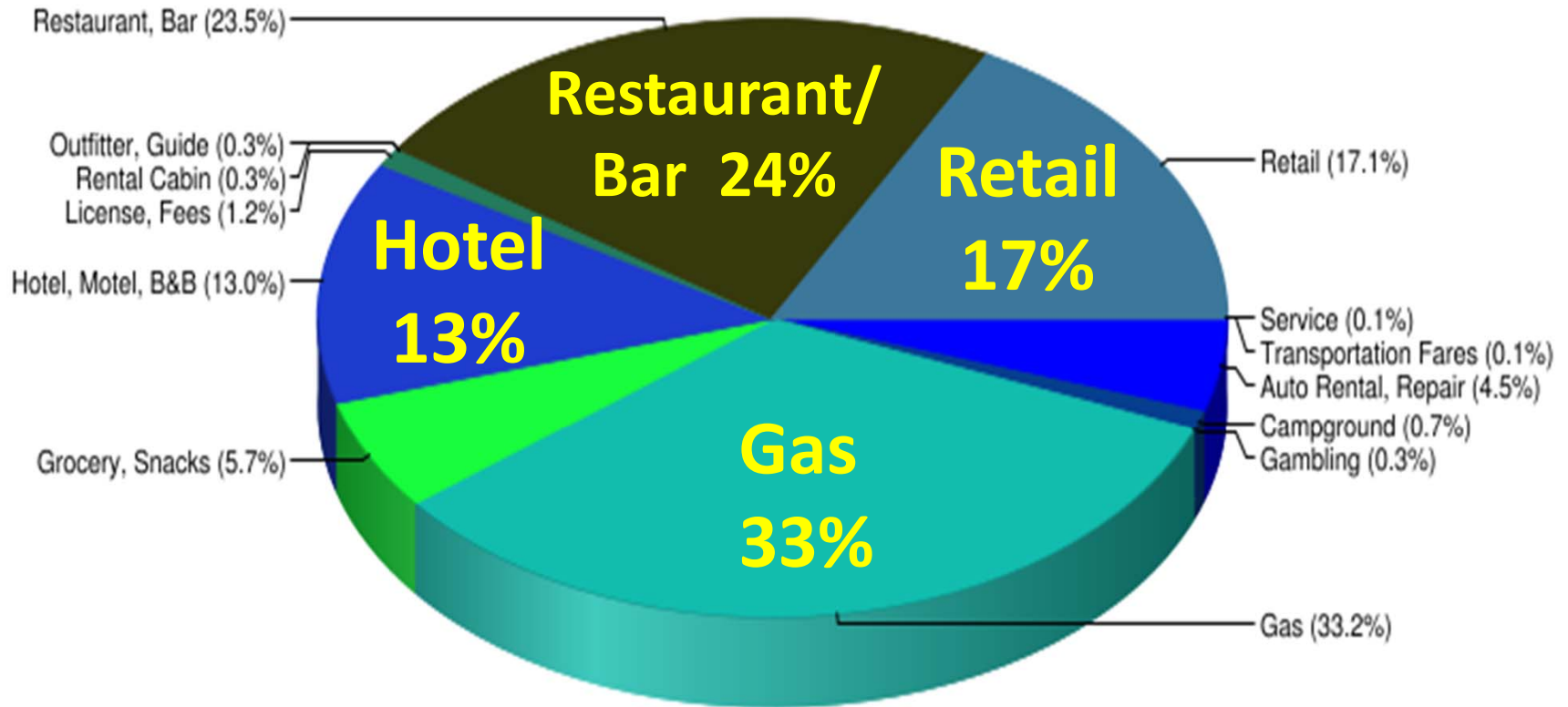


**\$43 Million; 2% of nonresident spending**

# Q3 Helena Airport Deboardings: 2002-2011

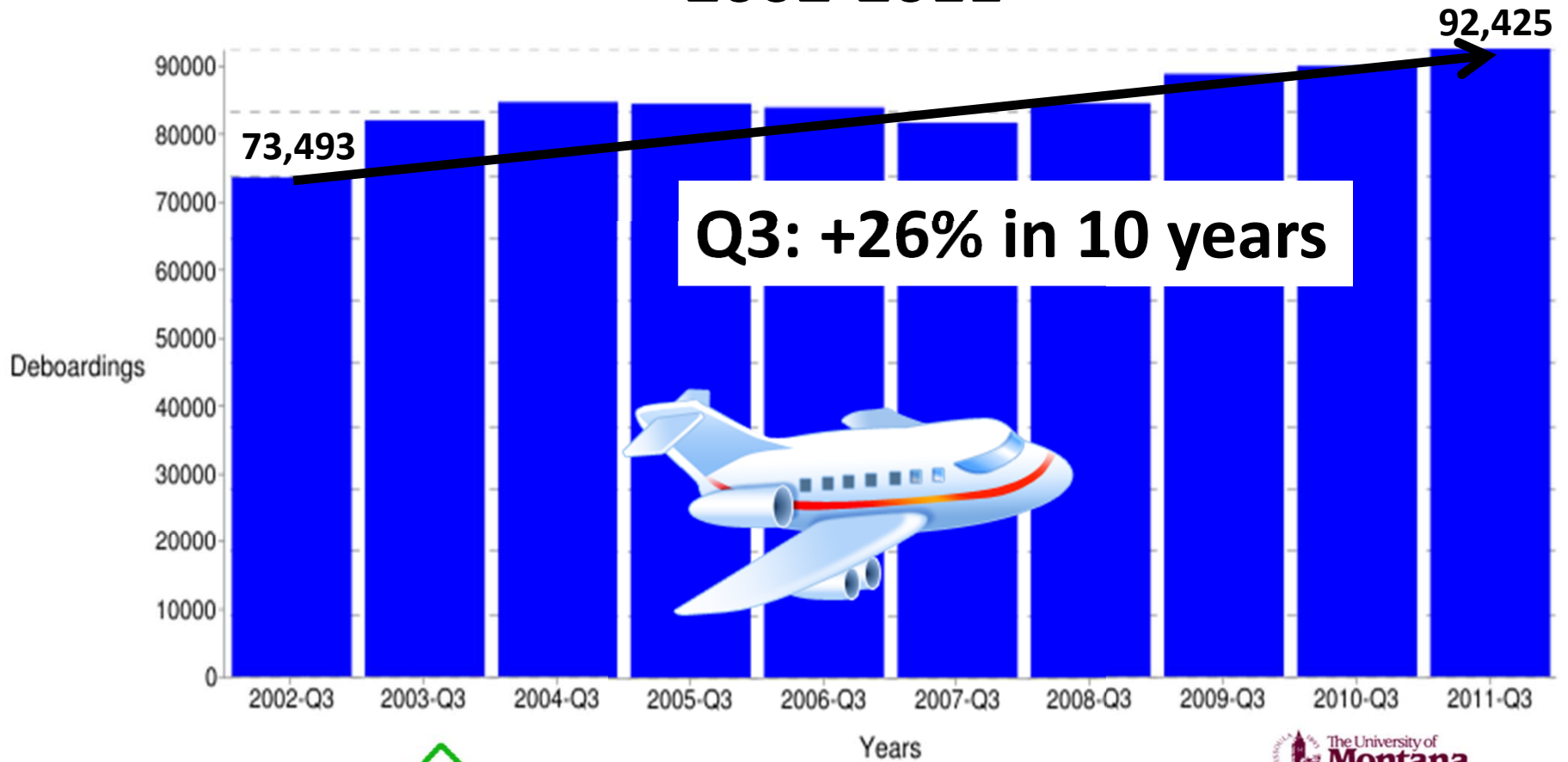


# Missoula County Nonresident Expenditures 2010



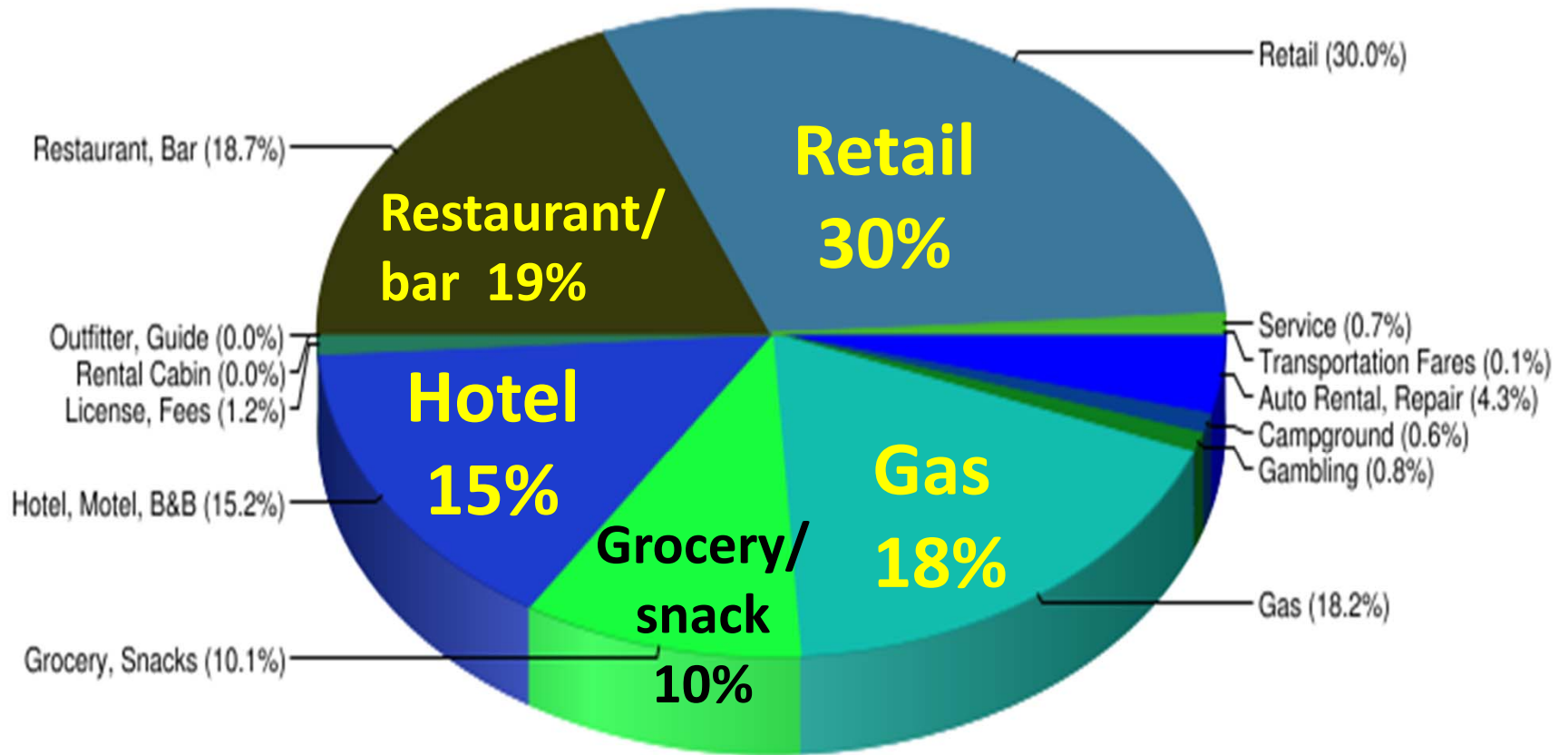
**\$230 Million; 9% of nonresident spending**

# Q3 Missoula Airport Deboardings: 2002-2011



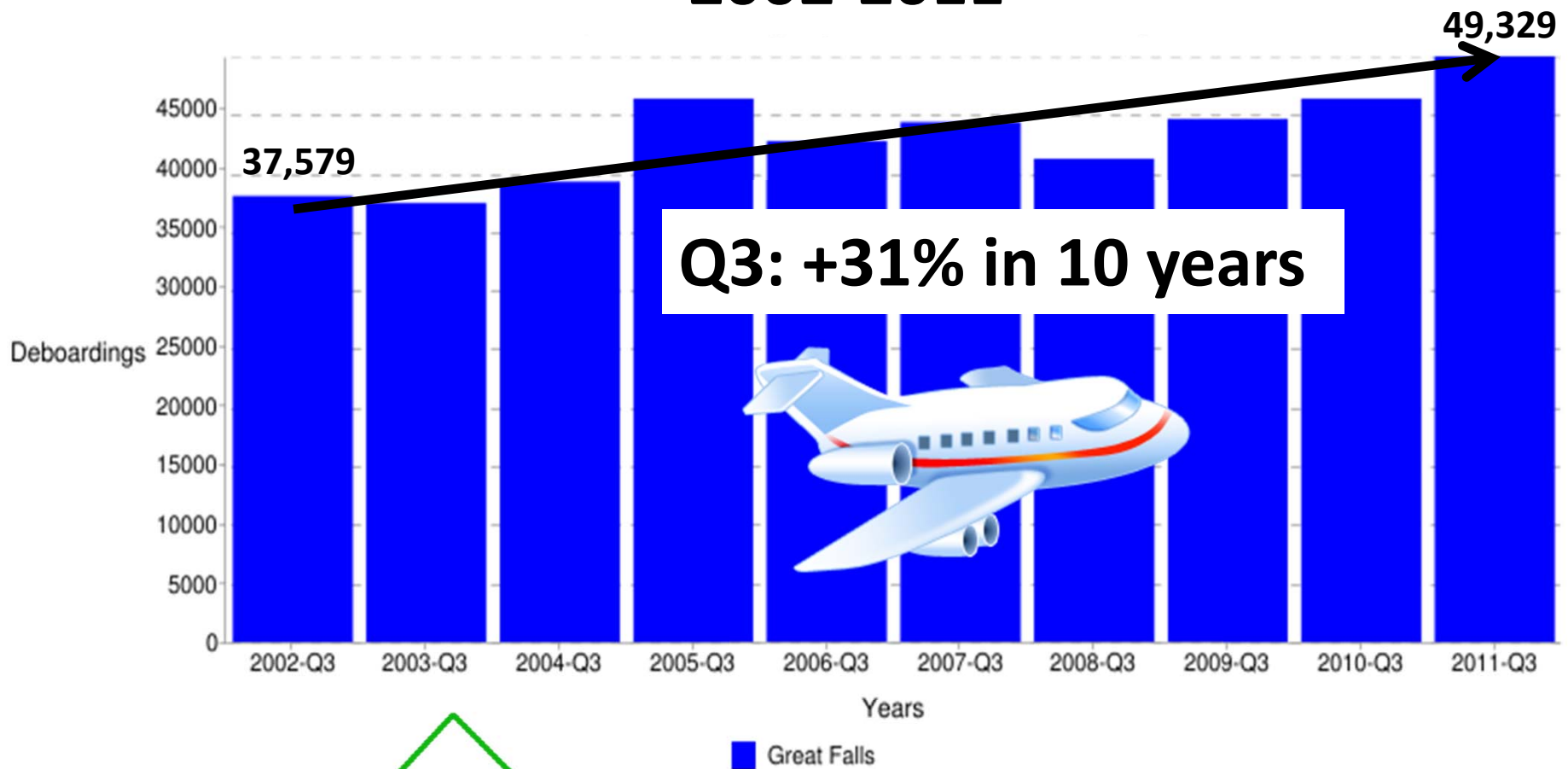


# Cascade County Nonresident Expenditures 2010

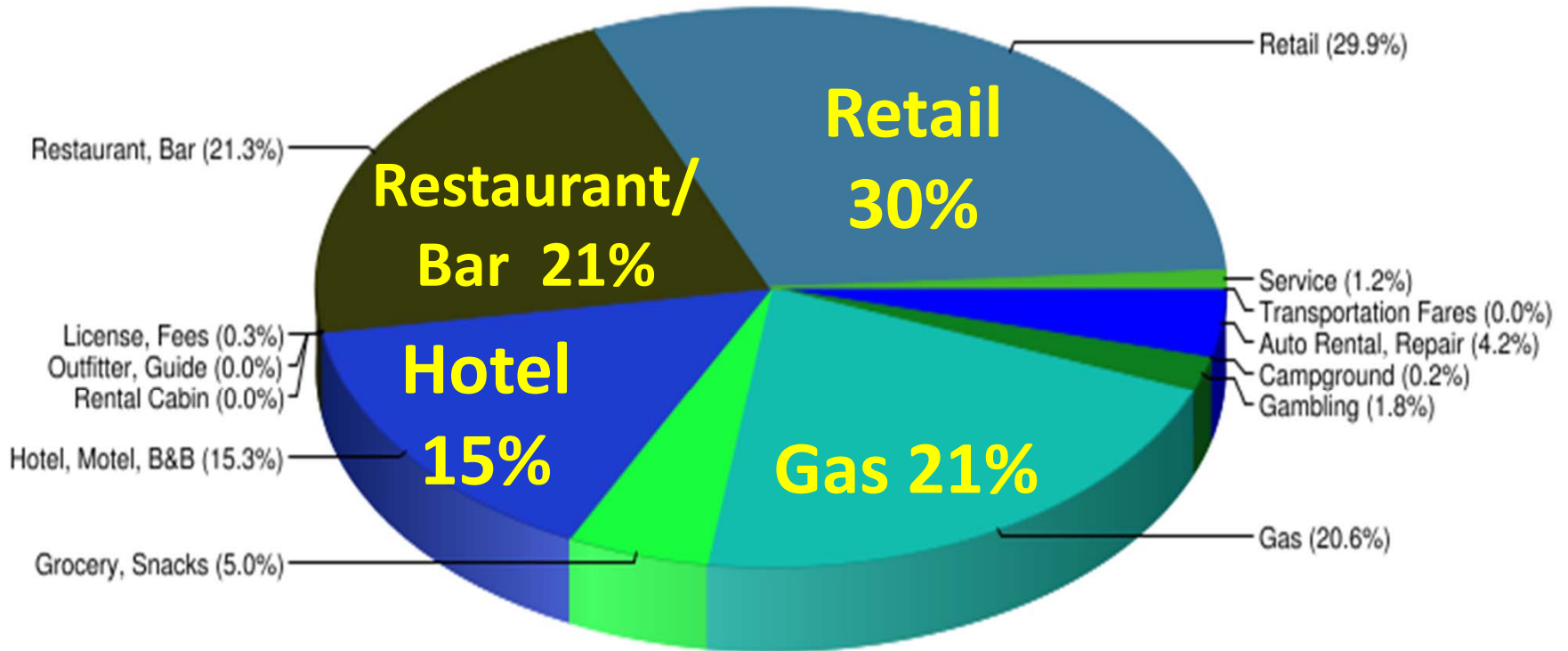


**\$31 Million; 2% of nonresident spending**

# Q3 Great Falls Airport Deboardings: 2002-2011

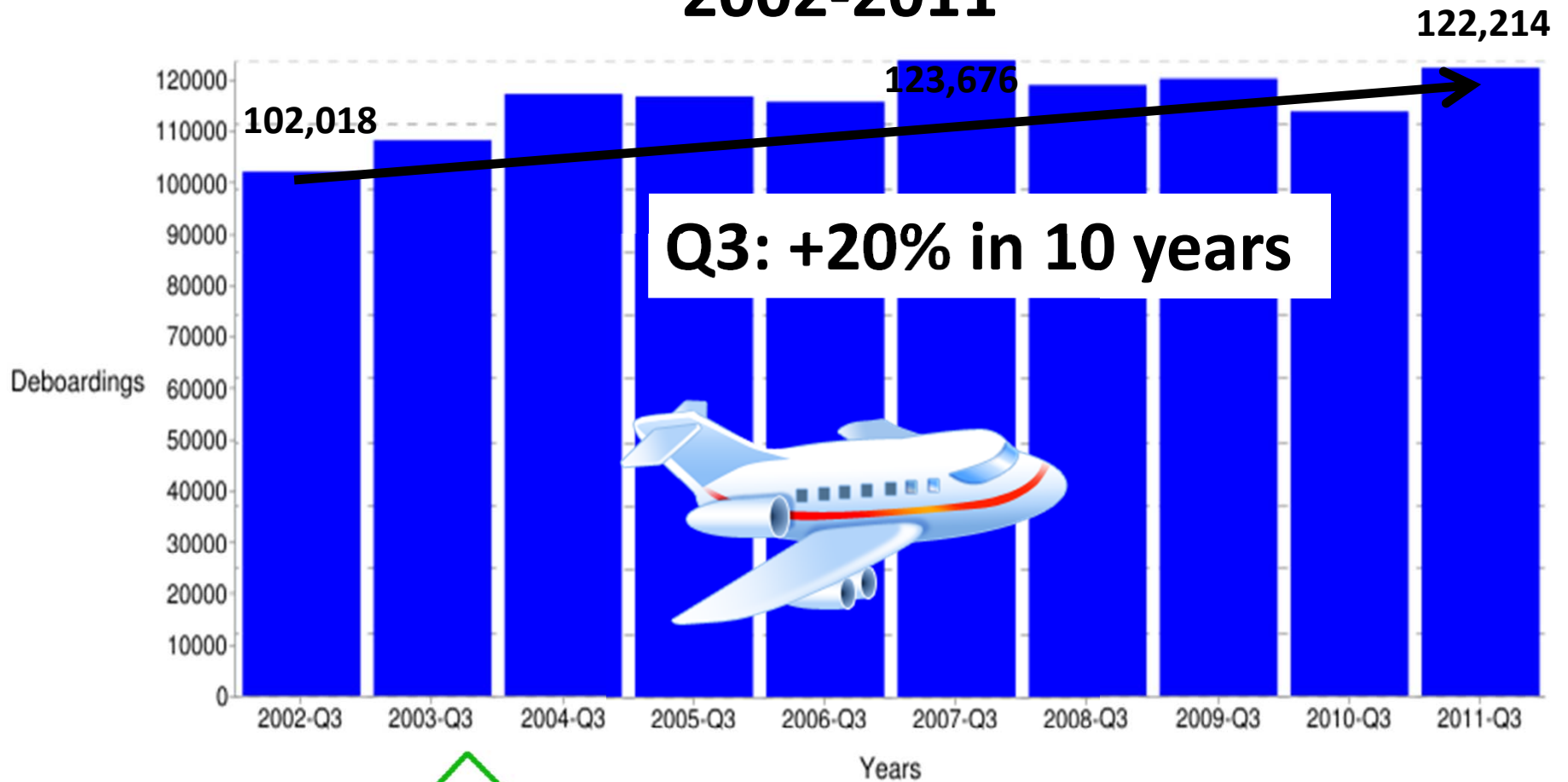


# Yellowstone County Nonresident Expenditures 2010

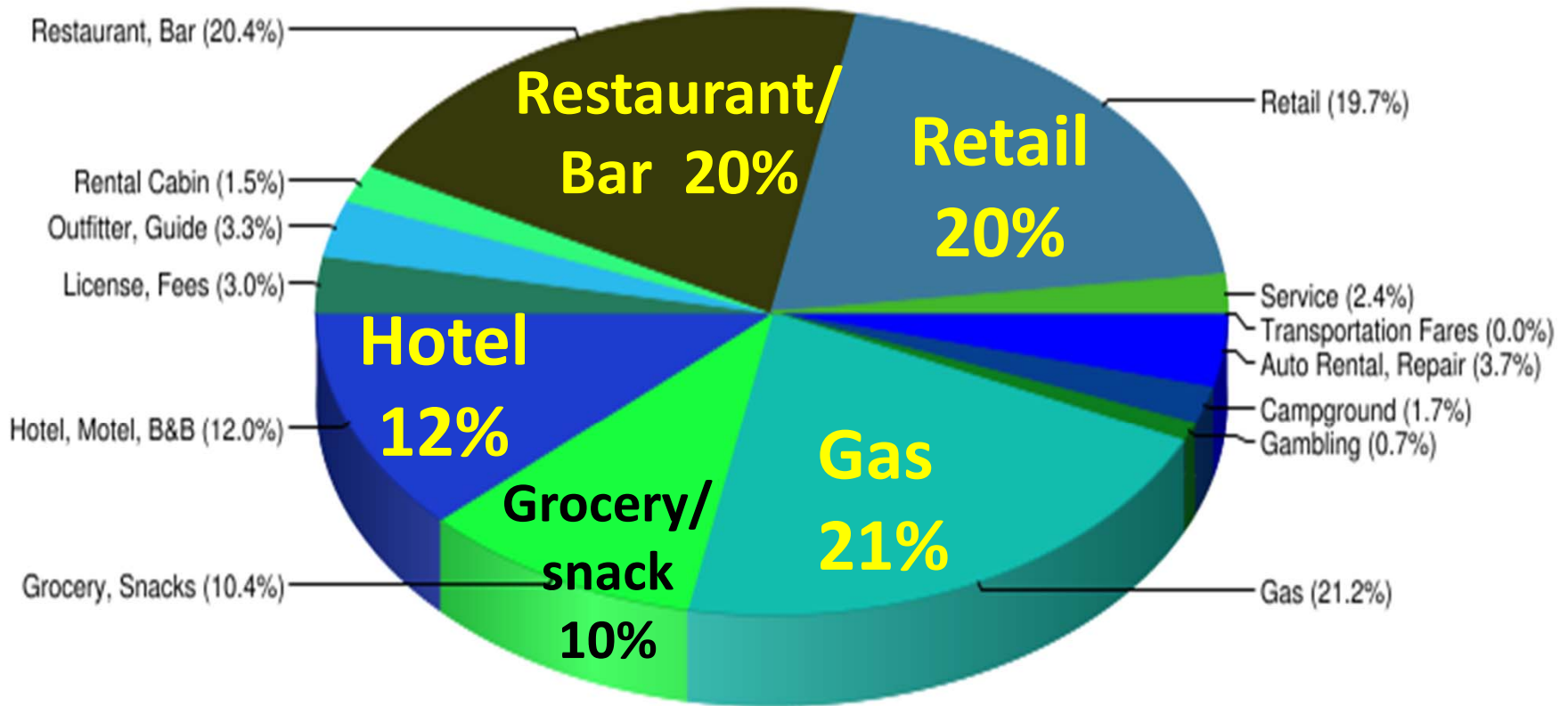


**\$ 369 Million; 15% of nonresident spending**

# Q3 Billings Airport Deboardings: 2002-2011



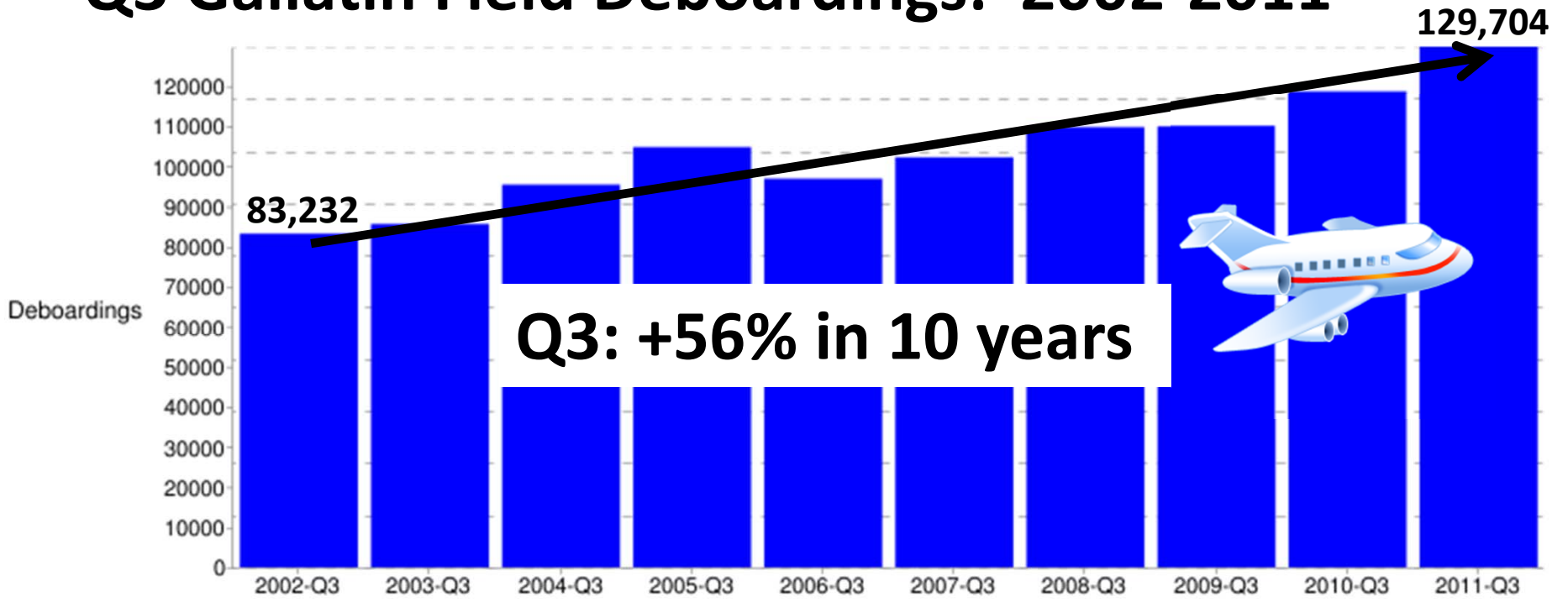
# Gallatin County Nonresident Expenditures 2010



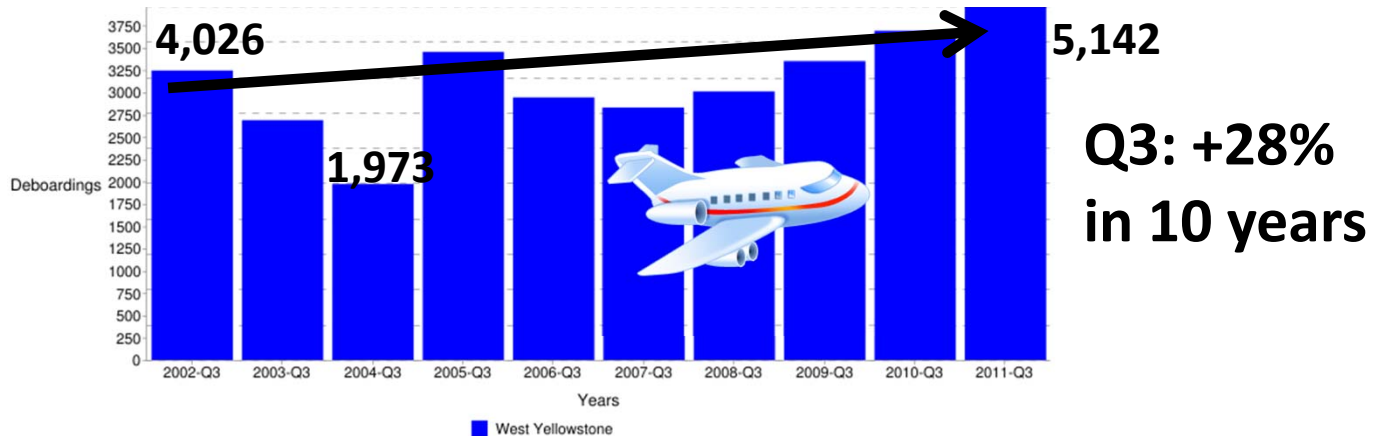
**\$498 Million; 20% of nonresident spending**



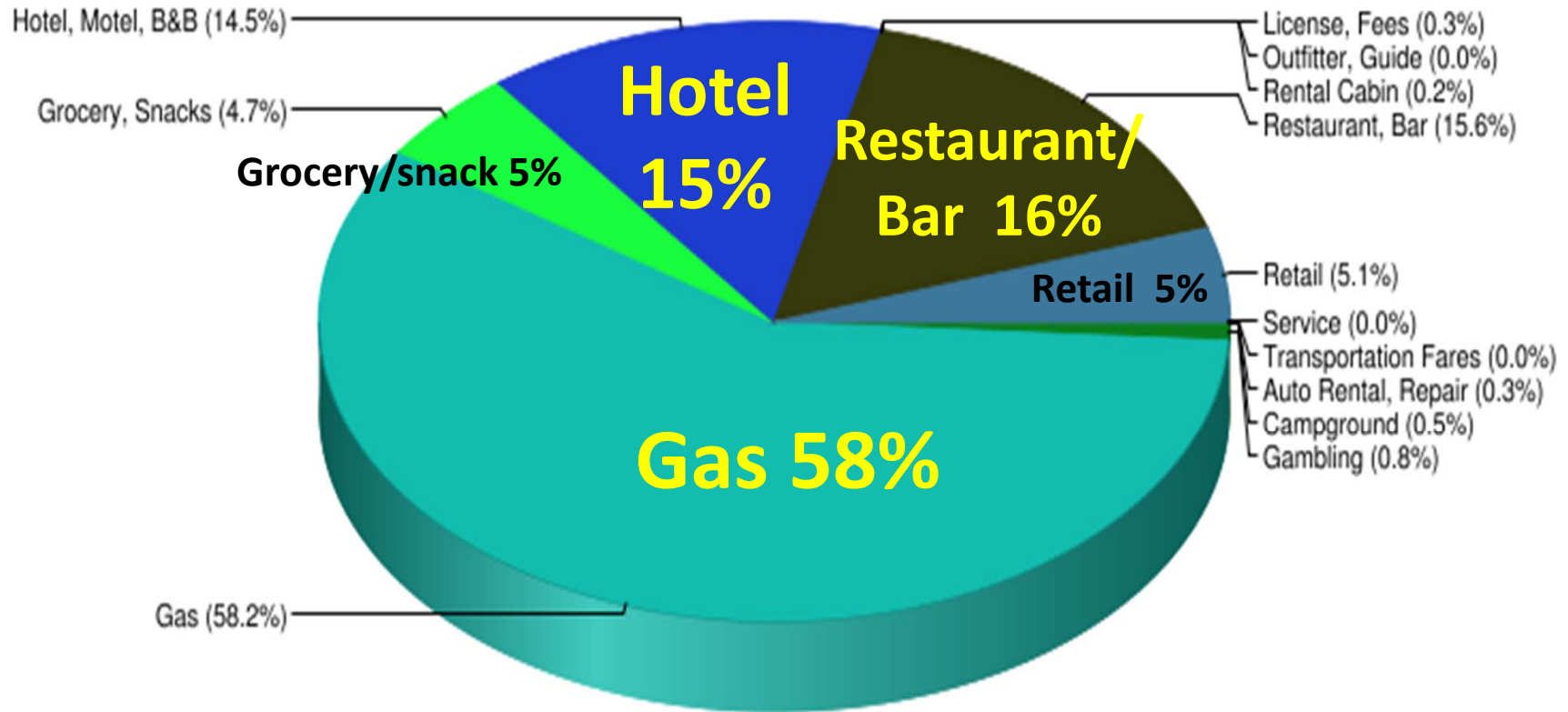
# Q3 Gallatin Field Deboardings: 2002-2011



# Q3 West Yellowstone Deboardings: 2002-2011

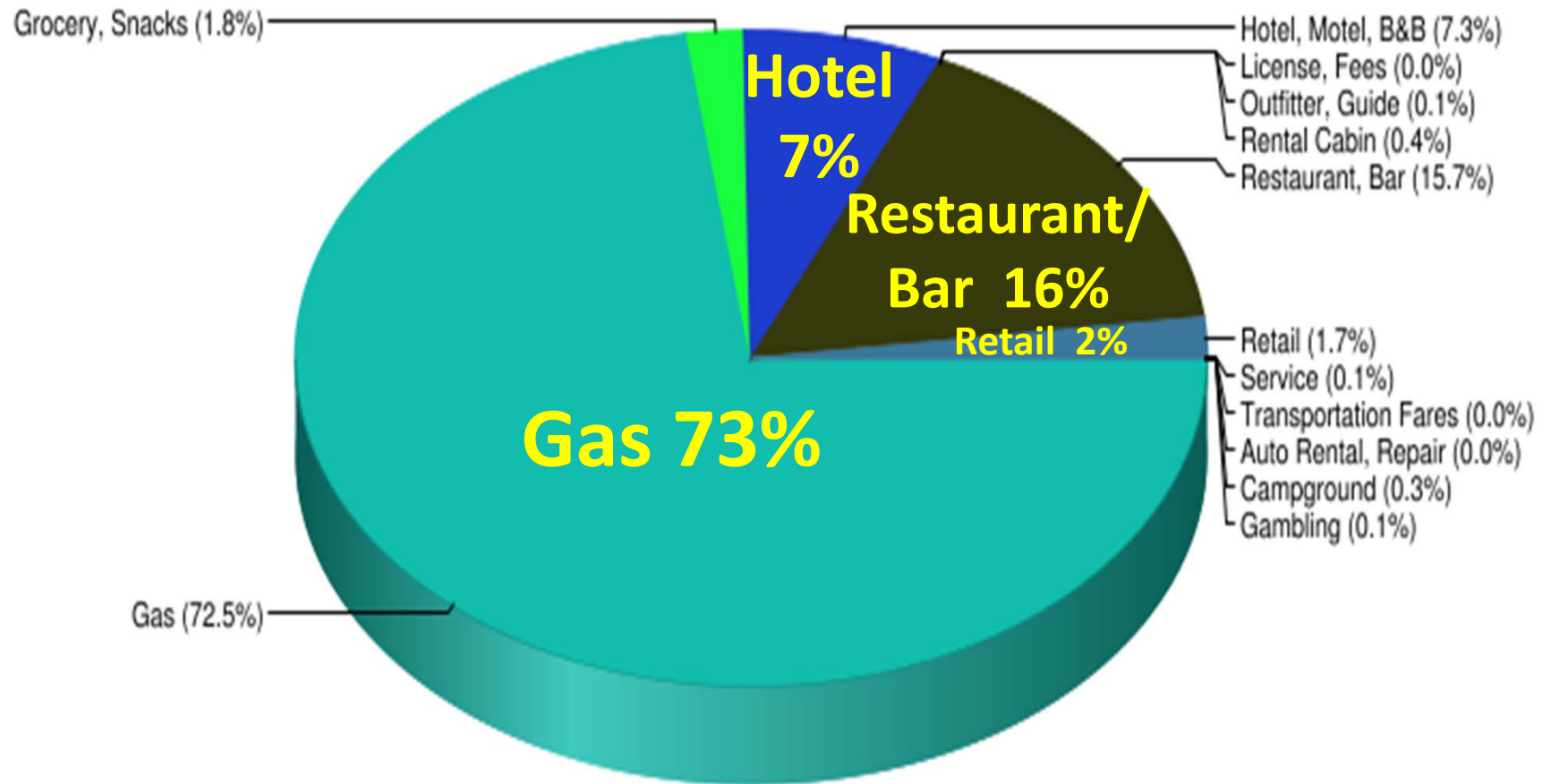


# Silver Bow County Nonresident Expenditures 2010



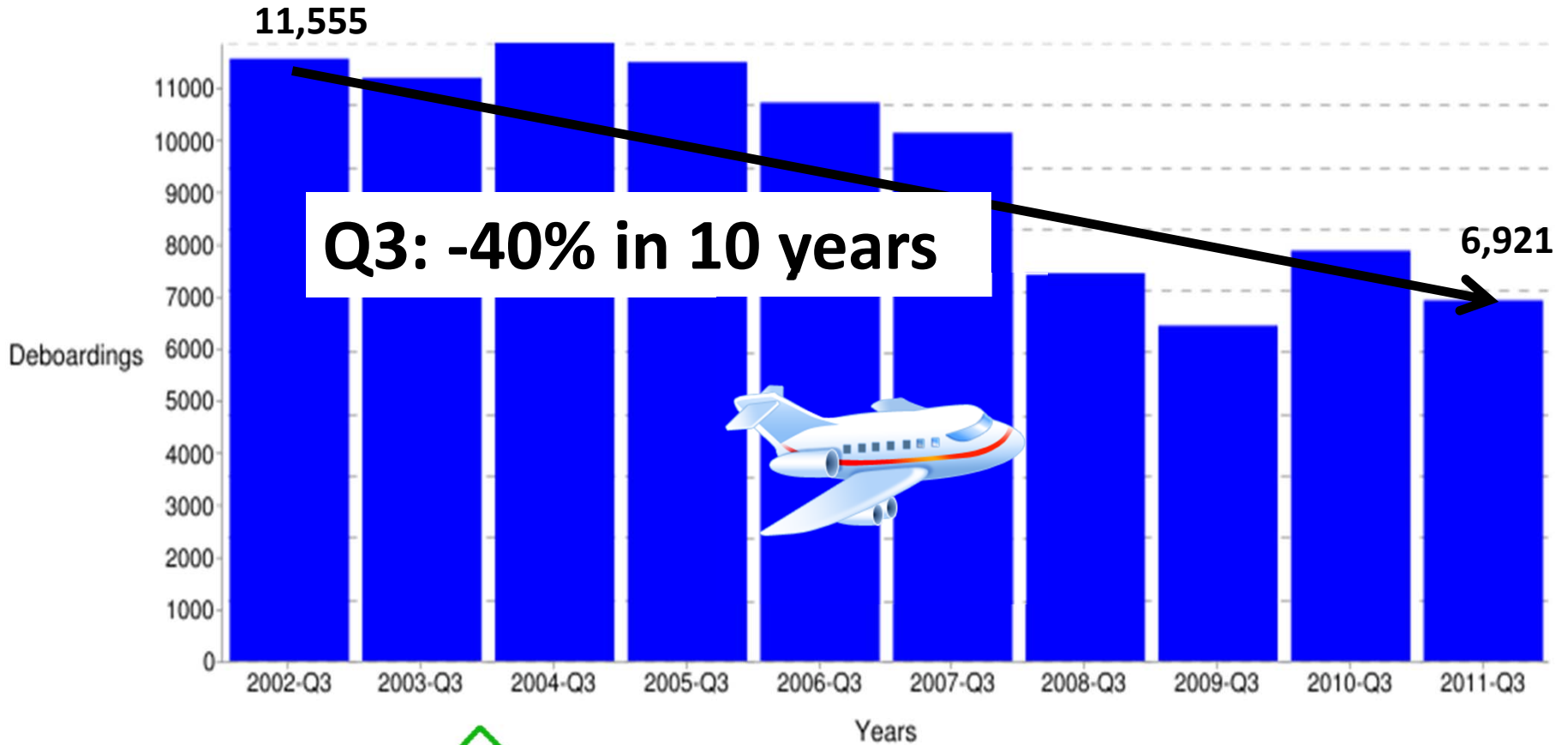
**\$100 Million; 4% of nonresident spending**

# Beaverhead County Nonresident Expenditures 2010

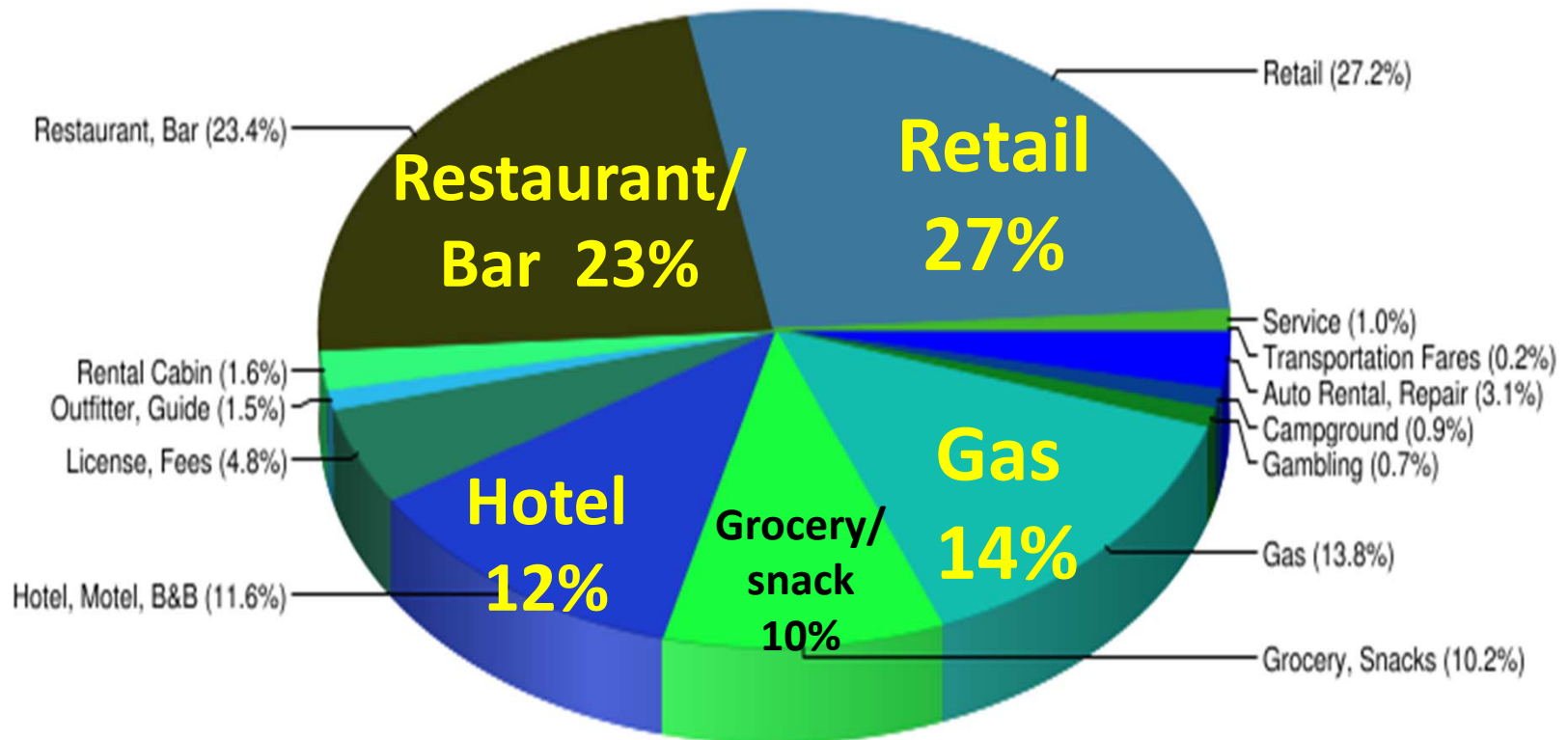


**\$112 Million; 4.5% of nonresident spending**

# Q3 Butte Airport Deboardings: 2002-2011



# Flathead County Nonresident Expenditures 2010

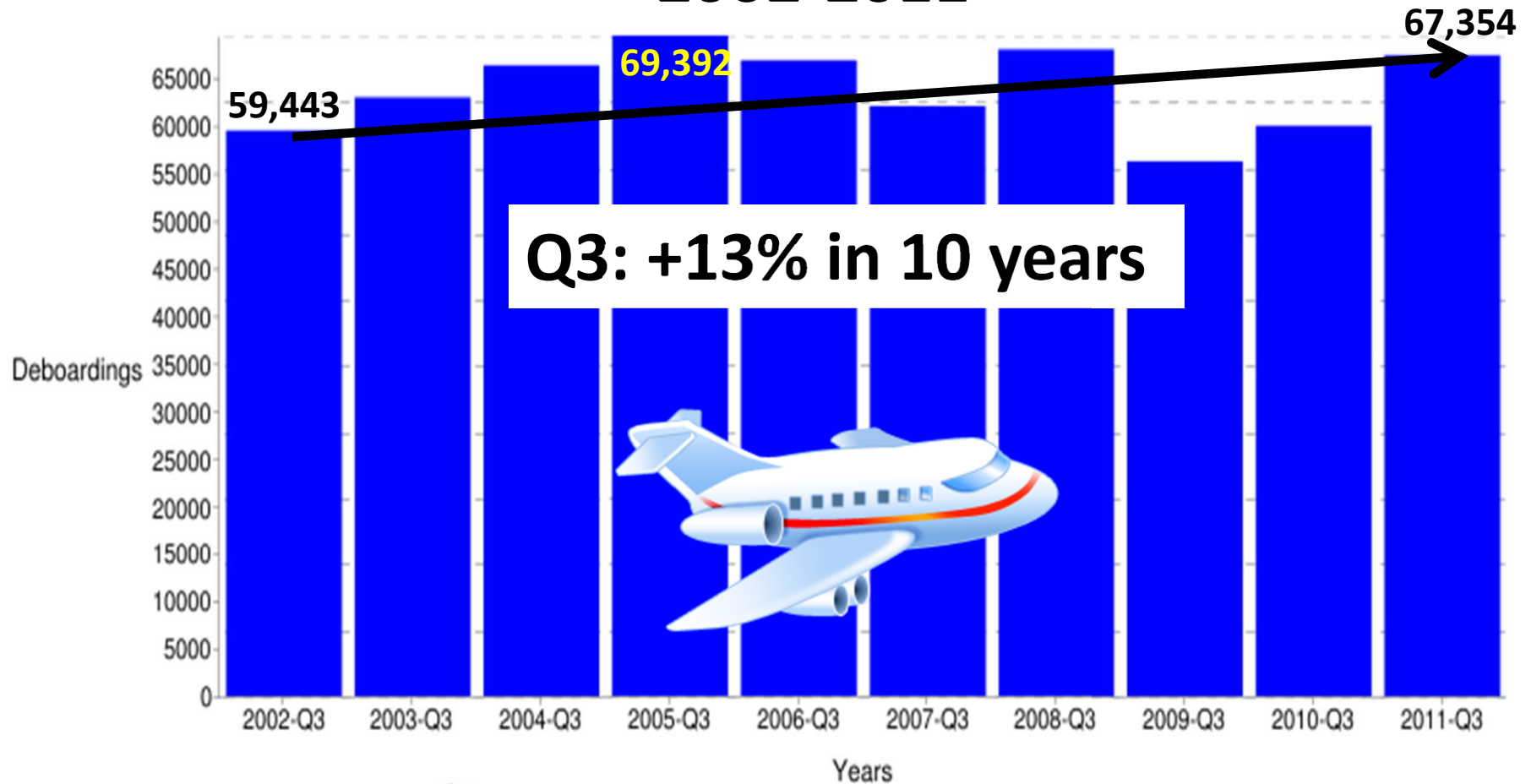


**\$276 Million**

**11% of Statewide nonresident spending**



# Q3 Glacier Airport Deboardings: 2002-2011



# Thank You!

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

