Soaring, Gliding, or ‘Bumpy Ride’?
Changes in Tourism

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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

+4% in 10 years

+2.0%
International and Overseas arrivals - slowing growth expected

*Forecasts as of October 2011
Source: U.S. Travel Association; Tourism Economics
MT Nonresident Visitation: 1991-2011

+7.8% since 2001

10.3 million

* projected
Percent Change in Montana and US Visitation

- Montana
- United States
Montana National Park System Visits
January - October: 2006-2011

Photo: Norma Nickerson
Glacier & Yellowstone National Parks 1990-2011

YNP - 7%
GNP - 20%
Amtrak deboardings 2006-2011

January – October

Flooding in ND
MT Skier Visits: 1988 - 2011

All Skier Visits Listed by Years

1,480,602 +9%
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

- Gas 52%
- Restaurant/Bar 17%
- Hotel 15%
- Grocery/snack 7%
- Other categories (License, Fees, Outfitter, Guide, Rental Cabin, Restaurant, Bar, Retail, Service, Transportation Fares, Auto Rental, Repair, Campground, Gambling)

$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

- Restaurant/bar: 17%
- Retail: 23%
- Hotel: 13%
- Gas: 28%

$43 Million; 2% of nonresident spending
Q3 Helena Airport Deboardings: 2002-2011

Q3: +48% in 10 years
Missoula County
Nonresident Expenditures 2010

Restaurant/Bar 24%
Retail 17%
Hotel 13%
Gas 33%

$230 Million; 9% of nonresident spending
Q3 Missoula Airport Deboardings: 2002-2011

Q3: +26% in 10 years
Cascade County
Nonresident Expenditures 2010

- Retail: 30%
- Hotel: 15%
- Gas: 18%
- Grocery/snack: 10%
- Restaurant/bar: 19%

$31 Million; 2% of nonresident spending
Q3 Great Falls Airport Deboardings: 2002-2011

Q3: +31% in 10 years
$ 369 Million; 15% of nonresident spending
Q3 Billings Airport Deboardings: 2002-2011

Q3: +20% in 10 years
Gallatin County
Nonresident Expenditures 2010

- Restaurant/Bar 20%
- Retail 20%
- Hotel 12%
- Gas 21%
- Grocery/snack 10%
- Other: Rental Cabin (1.5%), Outfitter, Guide (3.3%), License, Fees (3.0%), Hotel, Motel, B&B (12.0%), Grocery, Snacks (10.4%), Service (2.4%), Transportation Fares (0.0%), Auto Rental, Repair (3.7%), Campground (1.7%), Gambling (0.7%), Gas (21.2%)

$498 Million; 20% of nonresident spending
Q3 Gallatin Field Deboardings: 2002-2011

Q3: +56% in 10 years

Q3 West Yellowstone Deboardings: 2002-2011

Q3: +28% in 10 years
Silver Bow County
Nonresident Expenditures 2010

Restaurant/Bar 16%
Hotel 15%
Gas 58%
Retail 5%
Grocery/snack 5%

$100 Million; 4% of nonresident spending
Beaverhead County
Nonresident Expenditures 2010

$112 Million; 4.5% of nonresident spending
Q3 Butte Airport Deboardings: 2002-2011

Q3: -40% in 10 years
$276 Million
11% of Statewide nonresident spending
Q3 Glacier Airport Deboardings: 2002-2011

Q3: +13% in 10 years
Thank You!

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Photo: Libby Covelli