Travel & Recreation: Jobs, Lifestyle, & Growth

Norma P. Nickerson
Institute for Tourism & Recreation Research
University of Montana
www.itrr.umt.edu
Nonresident Visitors to MT

<table>
<thead>
<tr>
<th>Year</th>
<th>Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>2003</td>
<td>9,670,000</td>
</tr>
<tr>
<td>2004</td>
<td>9,800,000</td>
</tr>
<tr>
<td>2005</td>
<td>10,126,000</td>
</tr>
<tr>
<td>2006</td>
<td>10,684,000</td>
</tr>
<tr>
<td>2007</td>
<td>10,000,000</td>
</tr>
<tr>
<td>2008</td>
<td>9,992,000</td>
</tr>
<tr>
<td>2009</td>
<td>10,377,000</td>
</tr>
<tr>
<td>2010</td>
<td>10,547,000</td>
</tr>
<tr>
<td>2011</td>
<td>10,882,000</td>
</tr>
</tbody>
</table>

*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
- $695 million Direct
- $343 million Indirect & Induced

Nonresident
- $1.5 billion Indirect & Induced

Combined: $5.1 billion Economic Contribution to Montana in 2012
Nonresident travel supports 42,860 jobs
Resident travel supports 11,830 jobs

- rancher
- second hand store
- Art gallery
- grocery store
- RV repair
- health care
- car dealer
- maintenance job
- Publisher
- snowmobile trail grooming
- Service tech for coca cola
- FWP
- Auto repair
- Electrician building new homes
- Yoga instructor
- Check Cashing Business
- Fishermes Biologist
- Massage Therapist
- Casino, subway, pizza delivery
- Univ. Administrator
- Forest service
- cherry orchard stand
- police officer
- Housekeeping
- Wait staff
- Realtor
- Construction & meat processing
- Built2nd homes
- self employed artist
- insurance agent
- Catering
- campground
- wrecker
- Play in a band
- fairs
- Historic Preservation Board
- farmer self employed
- wildlife conservation
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

Amtrak Deboardings 3rd Q

Nat’l Park System 3rd Q
Skier Visits -6%

Travel Trends

Bed Tax Collections 3rd Q +5%
59% of nonresidents who spent a night in Miles City came from these 7 states (2012, Q1-3).
Where residents are from who stay overnight in Miles City

<table>
<thead>
<tr>
<th>County</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yellowstone</td>
<td>17%</td>
</tr>
<tr>
<td>Missoula</td>
<td>13%</td>
</tr>
<tr>
<td>Lewis and Clark</td>
<td>11%</td>
</tr>
<tr>
<td>Richland</td>
<td>8%</td>
</tr>
<tr>
<td>Ravalli</td>
<td>8%</td>
</tr>
<tr>
<td>Sanders</td>
<td>6%</td>
</tr>
<tr>
<td>Fallon</td>
<td>5%</td>
</tr>
<tr>
<td>Hill</td>
<td>5%</td>
</tr>
<tr>
<td>Gallatin</td>
<td>5%</td>
</tr>
</tbody>
</table>
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!

www.itrr.umt.edu
norma.nickerson@umontana.edu