Travel & Recreation: Jobs, Lifestyle, & Growth

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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>10,000,000</td>
</tr>
<tr>
<td>2006</td>
<td>10,126,000</td>
</tr>
<tr>
<td>2007</td>
<td>10,378,000</td>
</tr>
<tr>
<td>2008</td>
<td>10,684,000</td>
</tr>
<tr>
<td>2009</td>
<td>10,000,000</td>
</tr>
<tr>
<td>2010</td>
<td>10,377,000</td>
</tr>
<tr>
<td>2011</td>
<td>10,547,000</td>
</tr>
<tr>
<td>2012*</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
- FWP
- Auto repair
- U pick farm
- Built2nd homes
- self employed artist
- Catering
- Art gallery
- Yoga instructor
- Cafeteria
- Teacher
- campground
- wrecker
- Play in a band
- student
- grocery store
- RV repair
- Ski patrol
- Fishery Biologist
- Campground
- cherry orchard stand
- Historical Preservation Board
- Massage Therapist
- car dealer
- Fisheries Biologist
- Check Cashing Business
- police officer
- Carpenter
- parks department
- Farmer self employed
- Snowmobile trail grooming
- Casino, subway, pizza delivery
- Univ. Administrator
- Forest service
- Housekeeping
- Wait staff
- wildlife conservation
- Service tech for coca cola
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!
Skier Visits: -6%

Travel Trends

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

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yellowstone</td>
<td>24%</td>
</tr>
<tr>
<td>Flathead</td>
<td>12%</td>
</tr>
<tr>
<td>Cascade</td>
<td>8%</td>
</tr>
<tr>
<td>Missoula</td>
<td>7%</td>
</tr>
<tr>
<td>Ravalli</td>
<td>6%</td>
</tr>
<tr>
<td>Big Horn</td>
<td>6%</td>
</tr>
<tr>
<td>Gallatin</td>
<td>4%</td>
</tr>
</tbody>
</table>
Where residents are from who stay overnight in West Yellowstone

<table>
<thead>
<tr>
<th>Location</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yellowstone</td>
<td>21%</td>
</tr>
<tr>
<td>Gallatin</td>
<td>16%</td>
</tr>
<tr>
<td>Lewis and Clark</td>
<td>8%</td>
</tr>
<tr>
<td>Missoula</td>
<td>6%</td>
</tr>
<tr>
<td>Ravalli</td>
<td>5%</td>
</tr>
<tr>
<td>Deer Lodge</td>
<td>5%</td>
</tr>
<tr>
<td>Granite</td>
<td>5%</td>
</tr>
<tr>
<td>Cascade</td>
<td>5%</td>
</tr>
<tr>
<td>Musselshell</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!

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