Nonresident Visitors to MT

2003 2004 2005 2006 2007 2008 2009 2010 2011 2012*
9,670,000 10,126,000 10,378,000 10,684,000 10,000,000 9,992,000 10,377,000 10,547,000 10,882,000

*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

- second hand store
- FWP
- Auto repair
- U pick farm
- Construction & meat processing
- Built2nd homes
- self employed artist
- Catering
- Realtor
- grocery store
- RV repair
- Art gallery
- Yoga instructor
- cafeteria
- teacher
- campground
- wrecker
- Play in a band
- Play in a band
- insurance agent
- health care
- car dealer
- Massage Therapist
- University Administrator
- Forest service
- Housekeeping
- police officer
- parks department
- farmer self employed
- wildlife conservation
- snowmobile trail grooming
- Casino, subway, pizza delivery
- cherry orchard stand
- Historic Preservation Board
- Service tech for coca cola
- FWP
- Ski patrol
- Fisheries Biologist
- camp

54,690 jobs
People choose to live/work in Montana because...

<table>
<thead>
<tr>
<th>Looking for a town with no traffic report, clean air, simple life, and kind people....</th>
</tr>
</thead>
<tbody>
<tr>
<td>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.</td>
</tr>
<tr>
<td>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.</td>
</tr>
<tr>
<td>The vast open space, quality of air and water.</td>
</tr>
<tr>
<td>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.</td>
</tr>
<tr>
<td>I love to fly fish!</td>
</tr>
</tbody>
</table>
Travel Trends

Airport Deboardings 3rd Q

Amtrak Deboardings 3rd Q

Nat’l Park System 3rd Q
61% of nonresidents who spent a night in Helena came from these 7 states and Alberta (2012, Q1-3).

4.2% of all nonresidents in MT stayed in Helena.
Where residents are from who stay overnight in Helena

<table>
<thead>
<tr>
<th>Location</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yellowstone</td>
<td>15%</td>
</tr>
<tr>
<td>Missoula</td>
<td>12%</td>
</tr>
<tr>
<td>Gallatin</td>
<td>11%</td>
</tr>
<tr>
<td>Cascade</td>
<td>9%</td>
</tr>
<tr>
<td>Ravalli</td>
<td>7%</td>
</tr>
</tbody>
</table>
2013 Outlook

• Consumer confidence improving
• US Travel spending at record level ($8,467 billion in 2012 vs $5.45 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