Nonresident Visitors to MT

- 2003: 9,670,000
- 2004: 9,800,000
- 2005: 10,378,000
- 2006: 10,684,000
- 2007: 10,000,000
- 2008: 9,992,000
- 2009: 10,377,000
- 2010: 10,547,000
- 2011: 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
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
+8%

Amtrak Deboardings 3rd Q
+17%

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

Bed Tax Collections 3rd Q +5%

Travel Trends
61% of nonresidents who spent a night in Butte came from these 7 states and Alberta (2012, Q1-3).
Where residents are from who stay overnight in Butte

<table>
<thead>
<tr>
<th>County</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yellowstone</td>
<td>16%</td>
</tr>
<tr>
<td>Flathead</td>
<td>12%</td>
</tr>
<tr>
<td>Gallatin</td>
<td>8%</td>
</tr>
<tr>
<td>Missoula</td>
<td>7%</td>
</tr>
<tr>
<td>Ravalli</td>
<td>7%</td>
</tr>
<tr>
<td>Cascade</td>
<td>6%</td>
</tr>
<tr>
<td>Lewis and Clark</td>
<td>5%</td>
</tr>
<tr>
<td>Lake</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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