2014 MT Outlook – Tourism & Recreation

Norma P. Nickerson, Director
Institute for Tourism and Recreation Research
College of Forestry and Conservation
University of Montana

Photo: MT Office of Tourism
Visitors like it here!

Top Nonresident Vacationer Activities 2012

- Scenic driving: 72%
- Wildlife watching: 49%
- Nature photography: 48%
- Day hiking: 44%
- Recreational shopping: 32%
- Car/RV camping: 30%
Nonresidents - By the Numbers in 2013

• 11 million nonresident visitors (+2%)
• $3.5 billion in direct spending
• Spending up in the first 3 quarters
  ✓ Q1 +4% ($151/day)
  ✓ Q2 +5% ($142/day)
  ✓ Q3 +20% ($162/day)
Residents like it here!

MT resident use of facilities and recreation areas in the state

- Walking/jogging/biking paths: 77%
- Hiking trails: 72%
- Picnic areas: 62%
- Heritage/historic areas/sites: 60%
- Campgrounds w/out hookups: 59%
- Natural or wild areas: 58%
- Scenic byways: 57%
- Wildlife viewing areas: 55%
Montanan’s GOT LOST in MT

2013 by the numbers
✓ $210 million on outdoor rec. trips
✓ 4.2 million person trips
✓ 88% over 18 did outdoor recreation
✓ 95% say outdoor recreation is important to their quality of life
The Gov’t. Shutdown Effect in MT
October 2012 vs October 2013

National Park visitation down 64%

Airport deboardings down 6%

Amtrak ridership down 7%

Rooms sold down 5%
Airport Deboardings Change by City: 2012-13*

- BILLINGS: +2%
- BOZEMAN: -11%
- BUTTE: -2%
- GREAT FALLS: +32%
- HELENA: +1%
- KALISPELL (Glacier): +4%
- MISSOULA: -1%
- WEST YELLOWSTONE: +8%

 Percent Change in Rooms Sold*

- 2012: MT +0.5%
- 2013: Mountain +32%

National Park Recreation Visits 2000-2013*

- Yellowstone down 7.2%
- Glacier up 1.3%

*Projected
2011-2012 Nonresident Traveler Expenditures & Economic Contribution in Cascade County (in 2012 $s)

2011-2012 (2-year avg.) Nonresident Traveler Expenditures in Cascade County

Table 1 - Total Nonresident Spending in Cascade County*

<table>
<thead>
<tr>
<th>Category</th>
<th>Spend</th>
<th>Category</th>
<th>Spend</th>
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</thead>
<tbody>
<tr>
<td>Retail sales</td>
<td>$83,760,000</td>
<td>Campgrnd, RV Park</td>
<td>$960,000</td>
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<tr>
<td>Gasoline</td>
<td>$50,520,000</td>
<td>Outfitter, Guide</td>
<td>$930,000</td>
</tr>
<tr>
<td>Restaurant, Bar</td>
<td>$39,710,000</td>
<td>Misc. Services</td>
<td>$880,000</td>
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<tr>
<td>Hotel, Motel</td>
<td>$26,450,000</td>
<td>Gambling</td>
<td>$810,000</td>
</tr>
<tr>
<td>Groceries, Snacks</td>
<td>$16,180,000</td>
<td>Vehicle Repairs</td>
<td>$580,000</td>
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<tr>
<td>Auto Rental</td>
<td>$6,910,000</td>
<td>Rental cabin, Condo</td>
<td>$230,000</td>
</tr>
<tr>
<td>Lic., Entrance Fees</td>
<td>$2,190,000</td>
<td>Farmers Market</td>
<td>$90,000</td>
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<tr>
<td>Transp. Fares</td>
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<td></td>
<td>$50,000</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>$230,270,000</strong></td>
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2014

- 57% MT business owners expect an increase (some as high as 10%)
- Nationally expect a 2% increase in domestic travel and 5% increase in international travel