

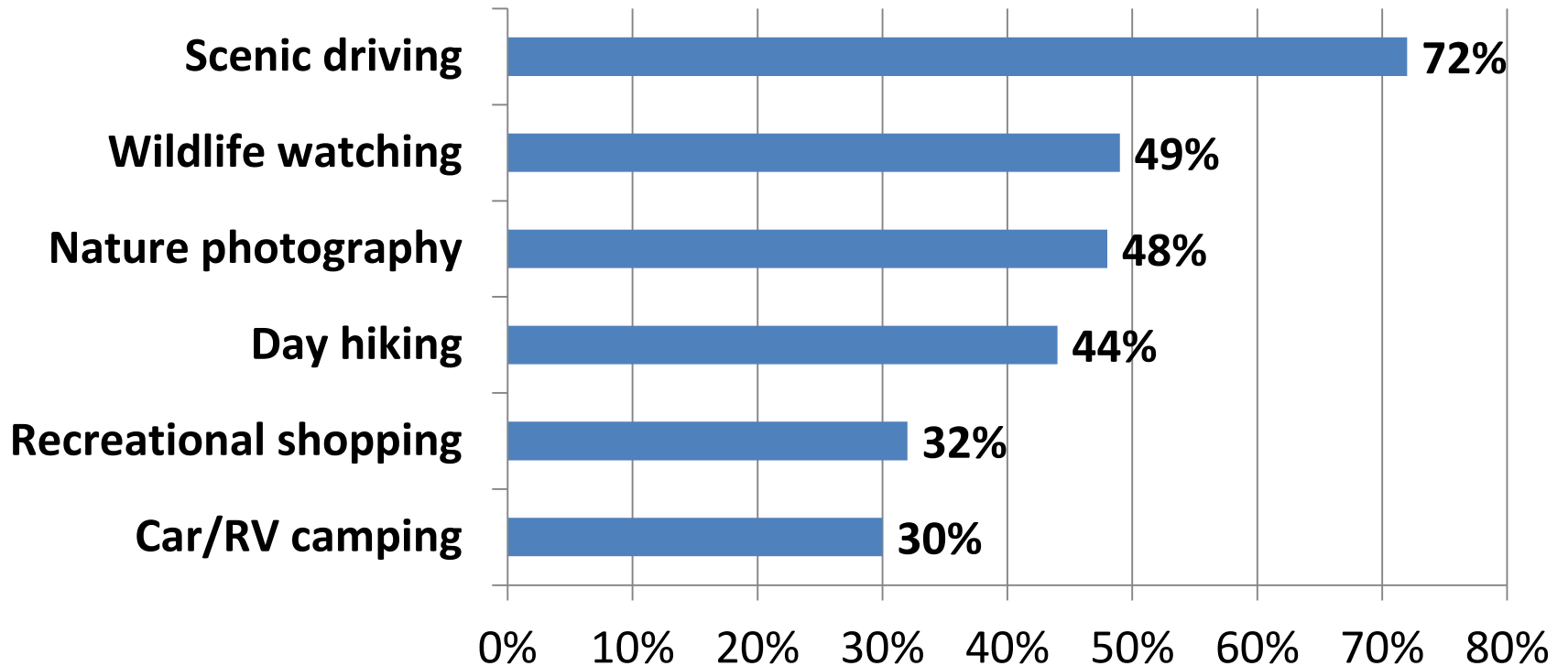
A photograph of two riders on horseback in a vast, open landscape. The rider in the foreground is wearing a dark jacket and a light-colored hat, riding a brown horse. The rider in the background is wearing a yellow jacket and a light-colored hat, riding a darker horse. The landscape is a mix of green grass and rocky terrain, with rolling hills and mountains in the distance under a blue sky.

# 2014 MT Outlook – Tourism & Recreation

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

# Visitors like it here!

## Top Nonresident Vacationer Activities 2012



# Nonresidents - By the Numbers in 2013

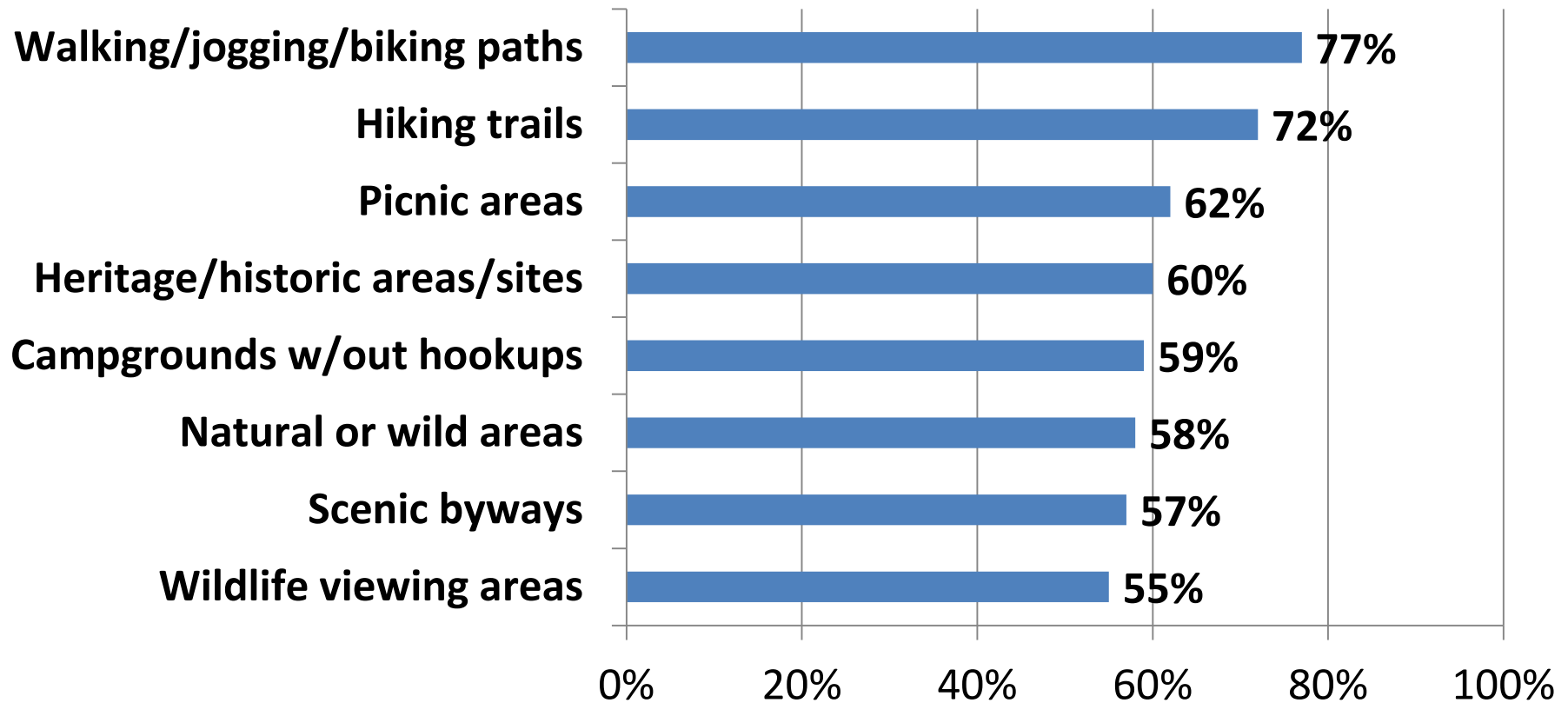
- **11 million nonresident visitors (+2%)**
- **\$3.5 billion in direct spending**
- **Spending up in the first 3 quarters**
  - ✓ Q1 +4% (\$151/day)
  - ✓ Q2 +5% (\$142/day)
  - ✓ Q3 +20% (\$162/day)

INSTITUTE FOR  
**TOURISM & RECREATION RESEARCH**

UNIVERSITY OF MONTANA

# Residents like it here!

## MT resident use of facilities and recreation areas in the state



# 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%

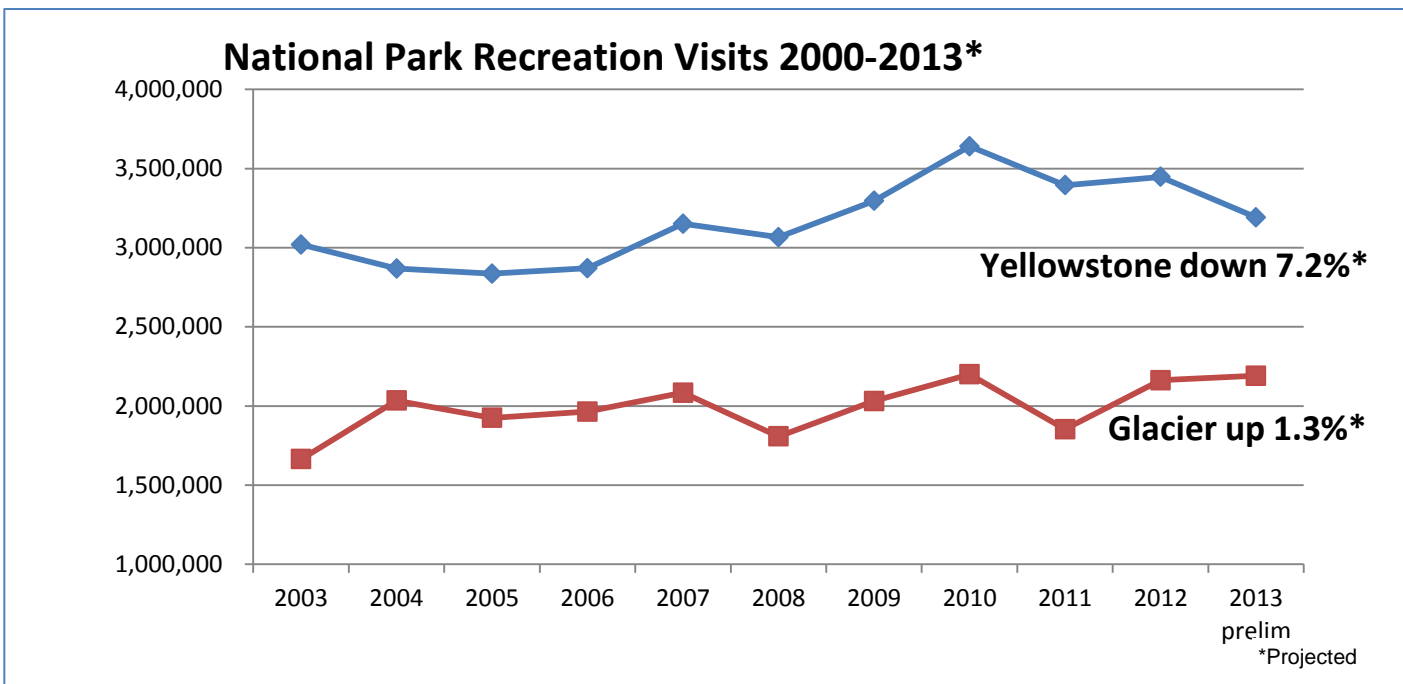
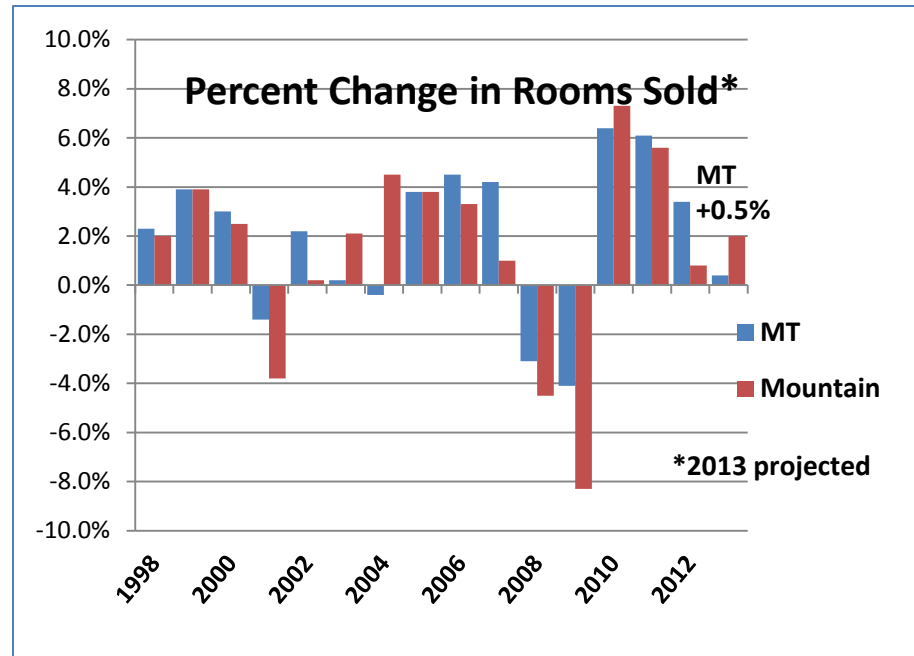
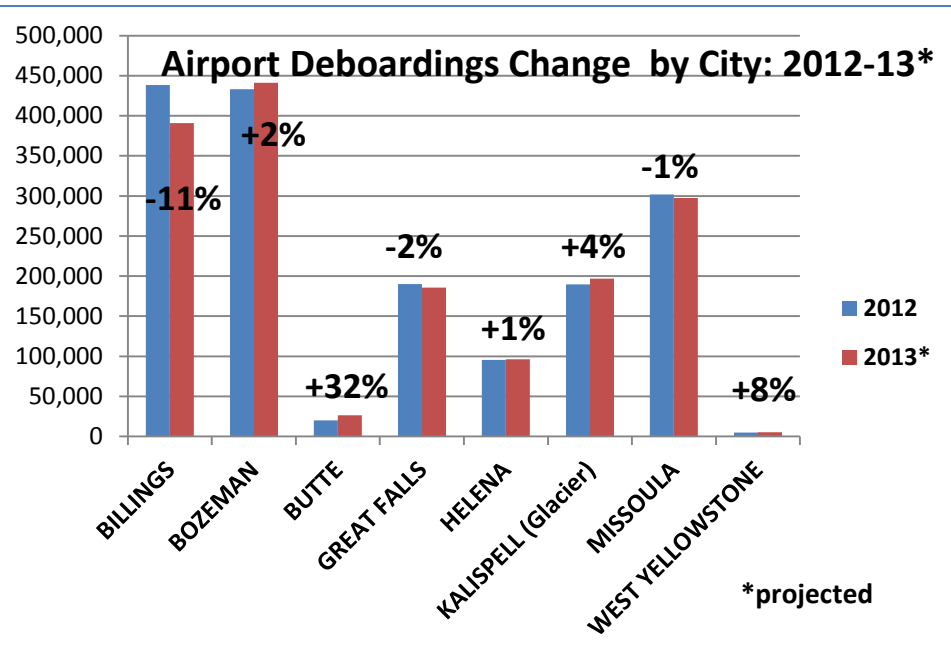


Amtrak ridership down 7%



Rooms sold down 5%



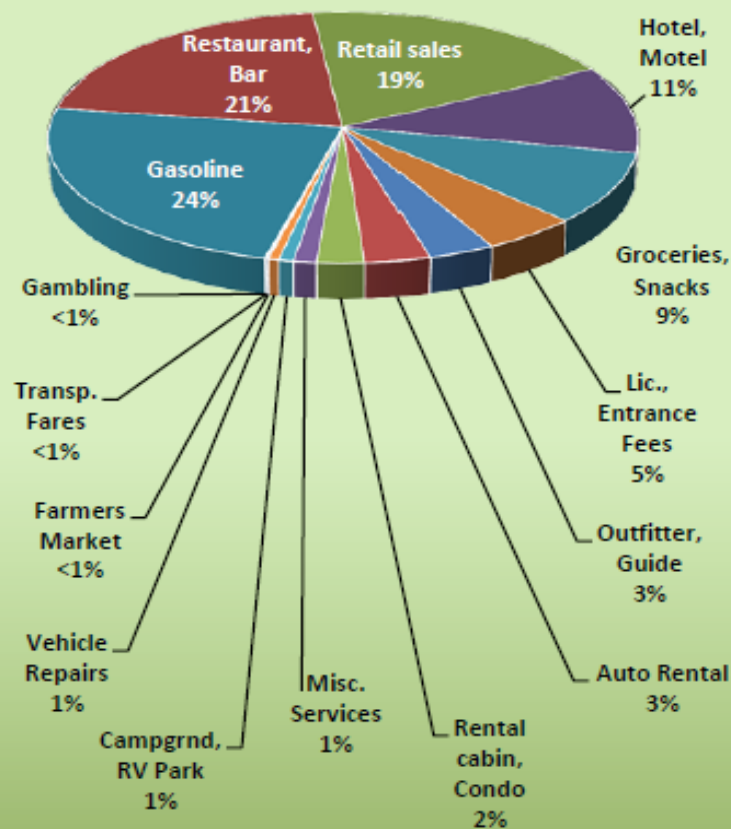


# 2011-2012 Nonresident Traveler Expenditures & Economic Contribution in Gallatin County (in 2012 \$s)

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



### 2011-2012 Nonresident Expenditure Percentages in Gallatin County



**Table 1 - Total Nonresident Spending in Gallatin County\*<sup>0</sup>**

Gasoline	\$131,750,000	Auto Rental	\$18,070,000
Restaurant, Bar	\$115,950,000	Rental cabin, Condo	\$13,320,000
Retail sales	\$105,900,000	Misc. Services	\$6,420,000
Hotel, Motel	\$62,300,000	Campgrnd, RV Park	\$4,040,000
Groceries, Snacks	\$51,480,000	Vehicle Repairs	\$2,930,000
Lic., Entrance Fees	\$26,950,000	Farmers Market	\$600,000
Outfitter, Guide	\$18,610,000	Transp. Fares	\$280,000
		Gambling	\$200,000
<b>TOTAL</b>		<b>\$558,800,000</b>	

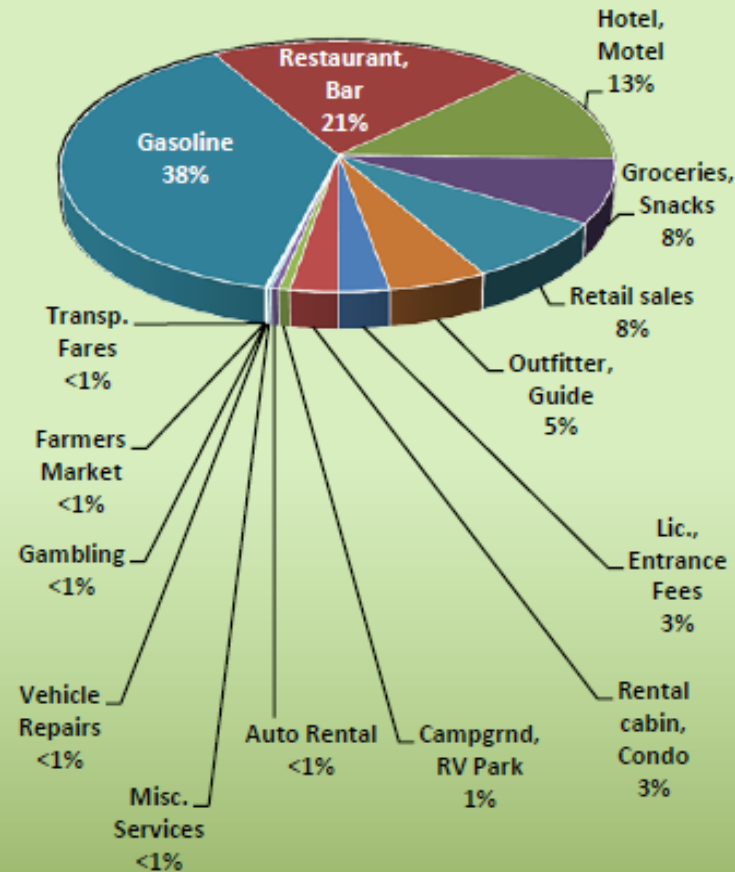


# 2011-2012 Nonresident Traveler Expenditures & Economic Contribution in Park County (in 2012 \$s)

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



### 2011-2012 Nonresident Expenditure Percentages in Park County



**Table 1 - Total Nonresident Spending in Park\***<sup>0</sup>

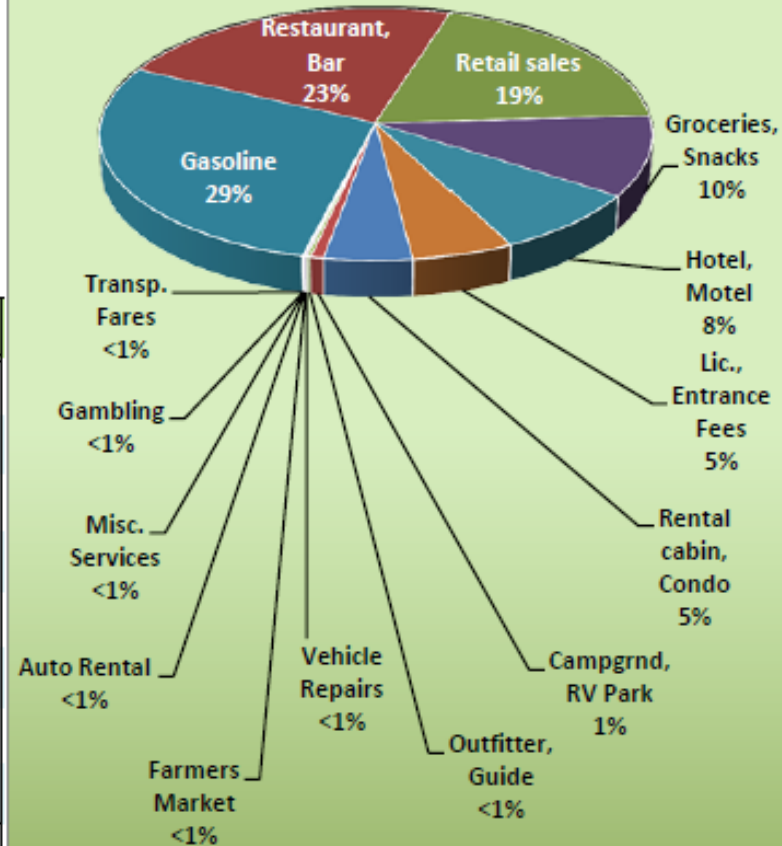
Gasoline	\$76,980,000	Rental cabin, Condo	\$5,150,000
Restaurant, Bar	\$41,470,000	Campgrnd, RV Park	\$1,220,000
Hotel, Motel	\$26,010,000	Auto Rental	\$810,000
Groceries, Snacks	\$17,000,000	Misc. Services	\$320,000
Retail sales	\$16,560,000	Vehicle Repairs	\$130,000
Outfitter, Guide	\$10,730,000	Gambling	\$130,000
Lic., Entrance Fees	\$5,550,000	Farmers Market	\$50,000
		Transp. Fares	\$10,000
<b>TOTAL</b>		<b>\$202,120,000</b>	

# 2011-2012 Nonresident Traveler Expenditures & Economic Contribution in Carbon County (in 2012 \$s)

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



### 2011-2012 Nonresident Expenditure Percentages in Carbon County



**Table 1 - Total Nonresident Spending in Carbon County\*<sup>0</sup>**

Gasoline	\$26,340,000	Campgrnd, RV Park	\$650,000
Restaurant, Bar	\$20,820,000	Outfitter, Guide	\$190,000
Retail sales	\$17,910,000	Vehicle Repairs	\$110,000
Groceries, Snacks	\$9,500,000	Farmers Market	\$40,000
Hotel, Motel	\$7,660,000	Auto Rental	\$40,000
Lic., Entrance Fees	\$4,960,000	Misc. Services	\$30,000
Rental cabin, Condo	\$4,400,000	Gambling	\$10,000
		Transp. Fares	<i>Insufficient Sample Size</i>
<b>TOTAL</b>	<b>\$92,660,000</b>		

# 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





Questions?  
[www.itrr.umt.edu](http://www.itrr.umt.edu)