2014 MT Outlook – Tourism & Recreation

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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)

Photo: MT Office of Tourism
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

INSTITUTE FOR TOURISM & RECREATION RESEARCH
UNIVERSITY OF MONTANA
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*

-11% +2% -2% +4% +32% +1% +8%

Percent Change in Rooms Sold*

MT +0.5%
Mountain *2013 projected

National Park Recreation Visits 2000-2013*

Yellowstone down 7.2%*
Glacier up 1.3%*

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

2011-2012 (2-year avg.) Nonresident Traveler Expenditures in Lewis and Clark

![Map of Lewis and Clark County]

Table 1 - Total Nonresident Spending in Lewis and Clark County*$^0$

<table>
<thead>
<tr>
<th>Category</th>
<th>Expenditure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gasoline</td>
<td>$22,680,000</td>
</tr>
<tr>
<td>Lic., Entrance Fees</td>
<td>$1,390,000</td>
</tr>
<tr>
<td>Restaurant, Bar</td>
<td>$21,860,000</td>
</tr>
<tr>
<td>Misc. Services</td>
<td>$450,000</td>
</tr>
<tr>
<td>Retail sales</td>
<td>$18,980,000</td>
</tr>
<tr>
<td>Campgrnd, RV Park</td>
<td>$340,000</td>
</tr>
<tr>
<td>Hotel, Motel</td>
<td>$10,430,000</td>
</tr>
<tr>
<td>Vehicle Repairs</td>
<td>$190,000</td>
</tr>
<tr>
<td>Groceries, Snacks</td>
<td>$8,300,000</td>
</tr>
<tr>
<td>Gambling</td>
<td>$190,000</td>
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<tr>
<td>Outfitter, Guide</td>
<td>$2,850,000</td>
</tr>
<tr>
<td>Rental cabin, Condo</td>
<td>$170,000</td>
</tr>
<tr>
<td>Auto Rental</td>
<td>$2,550,000</td>
</tr>
<tr>
<td>Farmers Market</td>
<td>$150,000</td>
</tr>
<tr>
<td>Transp. Fares</td>
<td>$20,000</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>$90,550,000</strong></td>
</tr>
</tbody>
</table>

2011-2012 Nonresident Expenditure Percentages in Lewis and Clark County

- Restaurant, Bar: 24%
- Retail sales: 21%
- Gasoline: 25%
- Transp. Fares: <1%
- Farmers Market: <1%
- Rental cabin, Condo: <1%
- Gambling: <1%
- Vehicle Repairs: <1%
- Campgrnd, RV Park: <1%
- Misc. Services: 1%
- Lic., Entrance Fees: 2%
- Outfitter, Guide: 3%
- Auto Rental: 3%
- Groceries, Snacks: 12%
- Hotel, Motel: 12%
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