Nonresident Visitation to MT

(In 1,000’s)

- 2009: 9,999
- 2010: 10,377
- 2011: 10,547
- 2012: 10,768
- 2013: 11,020
- 2014: 10,900
- 2015: 11,665 (+8%)

*Preliminary*
Tourism Business Owners: Customer % change 2013-2015

- Increased: 60% in 2013, 68% in 2014, 59% in 2015
- Stayed the same: 20% in 2013, 22% in 2014, 19% in 2015
- Decreased: 20% in 2013, 10% in 2014, 22% in 2015
$3.59 billion nonresident preliminary spending in 2015

- Gasoline, Diesel: 22%
- Restaurant, Bar: 18%
- Retail Sales: 13%
- Hotel, B&B, etc.: 11%
- Groceries, Snacks: 9%
- Outfitter, Guide: 8%
- Made in MT: 6%
- Licenses, Entrance Fees: 5%
- Auto Rental: 2%
- Rental Cabin, Condo: 2%
- Campground, RV Park: 1%
- Misc. Services: 1%
- Auto Repair: 1%
- Gambling: 1%
- Farmers Market: 1%
- Transp. Fares: <1%
## 2013-2014 Estimate of Nonresident Traveler Spending per County

<table>
<thead>
<tr>
<th>County</th>
<th>Spending (in $1000s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flathead</td>
<td>$668,136</td>
</tr>
<tr>
<td>Gallatin</td>
<td>$662,185</td>
</tr>
<tr>
<td>Yellowstone</td>
<td>$397,245</td>
</tr>
<tr>
<td>Missoula</td>
<td>$285,023</td>
</tr>
<tr>
<td>Cascade</td>
<td>$264,001</td>
</tr>
<tr>
<td>Park</td>
<td>$196,084</td>
</tr>
<tr>
<td>Lewis &amp;...</td>
<td>$117,039</td>
</tr>
<tr>
<td>Silver Bow</td>
<td>$109,444</td>
</tr>
<tr>
<td>Custer</td>
<td>$109,201</td>
</tr>
<tr>
<td>Lincoln</td>
<td>$90,407</td>
</tr>
<tr>
<td>Glacier</td>
<td>$85,588</td>
</tr>
<tr>
<td>Richland</td>
<td>$81,750</td>
</tr>
<tr>
<td>Toole</td>
<td>$75,376</td>
</tr>
<tr>
<td>Beaverhead</td>
<td>$67,014</td>
</tr>
<tr>
<td>Carbon</td>
<td>$62,053</td>
</tr>
<tr>
<td>Madison</td>
<td>$59,785</td>
</tr>
<tr>
<td>Dawson</td>
<td>$45,288</td>
</tr>
<tr>
<td>Hill</td>
<td>$39,972</td>
</tr>
<tr>
<td>Fergus</td>
<td>$38,131</td>
</tr>
<tr>
<td>Stillwater</td>
<td>$33,638</td>
</tr>
<tr>
<td>Lake</td>
<td>$32,567</td>
</tr>
<tr>
<td>Ravalli</td>
<td>$32,431</td>
</tr>
<tr>
<td>Big Horn</td>
<td>$30,120</td>
</tr>
<tr>
<td>Mineral</td>
<td>$26,242</td>
</tr>
<tr>
<td>Valley</td>
<td>$21,406</td>
</tr>
</tbody>
</table>

Counties with $20 million or more.
Another way to visualize it:
72% of all nonresident spending occurs in these 10 counties...
Airport Deboardings Change by City:
2014-15*

- Billings: +1.7%
- Bozeman: +4.6%
- Butte: -6.3%
- Great Falls: -2.4%
- Helena: +1.7%
- Kalispell (Glacier): +3.1%
- Missoula: +3.2%
- West Yellowstone: +38.0%

*Projected
## Most Popular Outdoor Recreation*

<table>
<thead>
<tr>
<th>Top Youth Activities (6-24 yrs.)</th>
<th>Top Adult Activities (25+ yrs.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Running, jogging, trail running</td>
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</tr>
<tr>
<td>- Bicycling (road, mountain, BMX)</td>
<td>- Fishing (fresh, salt, and Fly)</td>
</tr>
<tr>
<td>- Camping (car and RV)</td>
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</tr>
<tr>
<td>- Fishing (fresh, salt, and Fly)</td>
<td>- Hiking</td>
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<td>- Camping (car and RV)</td>
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</table>

* 2015 Topline Report  
Outdoor Foundation
Demographics in Travel

• Millennials travel differently than Boomers
  • airBnB, VRBO, Uber, Vayable

• Both Boomers and Millennials want experiences

• Both Boomers and Millennials are more interested in the authentic rather than the contrived experience

• Millennials spend considerably less than Boomers
International Travel in MT

Top overseas countries: MT tourism business survey

UK
China
Germany
Japan
Australia
France
Netherland
Mixed Outlook for 2016 because...

- Discretionary income (up)
- Unemployment (steady)
- Household debt (down) except for Millennials
- US dollar (strong)
- Intention to travel (up) but staying closer to home
- Gas prices (low)
- Election year jitters
Montana 2016 Outlook

• Expect increases to Glacier and Yellowstone National parks
• Only 5% of MT Tourism business expect a decrease in 2016.
• Last year we said spending would be up 2-5% when in fact it was actually down. New normal?
• Made in MT products and MT experiences will continue to be a growth sector in the travel industry.
Thank you!
For more local data and information go to:
www.itrr.umt.edu