Tourism & Recreation: A Big Force in MT

Norma Nickerson, Ph.D.
Institute for Tourism and Recreation Research
University of Montana
Outdoor REC Act passed – unanimous and bipartisan

- Outdoor recreation in the USA is $646 billion in consumer spending
- 6.1 million American jobs
- $80 billion in federal, state, local tax revenue
Montana Outdoor Recreation Economy

• $5.8 billion in consumer spending*
• 64,000 direct jobs
• $403 million in state & local tax revenue

*Outdoor Recreation Industry
U.S. Travel Industry

• Direct spending on Leisure travel is $651 billion*
• 15.1 million American jobs supported by travel spending
• $147 billion in federal, state, local tax revenue generated by travel spending

*US Travel Industry Association
Montana Nonresident Travel Industry

- $3.5 billion in consumer spending
- 52,630 combined Montana jobs; 38,300 direct jobs
- $194 million in state & local tax revenue
The Outdoors IS our Business
Yellowstone National Park

5-Year Yellowstone National Park Visitation

<table>
<thead>
<tr>
<th>Year</th>
<th>Visitation</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>-8%</td>
</tr>
<tr>
<td>2013</td>
<td>10%</td>
</tr>
<tr>
<td>2014</td>
<td>17%</td>
</tr>
<tr>
<td>2015</td>
<td>4%</td>
</tr>
<tr>
<td>2016p</td>
<td></td>
</tr>
</tbody>
</table>
## Incidents Involving Impacts to Resources and Visitor Experience 2014 to 2015

<table>
<thead>
<tr>
<th>Incident</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wildlife Jams</td>
<td>+14%</td>
</tr>
<tr>
<td>Noise Complaints</td>
<td>+19%</td>
</tr>
<tr>
<td>Resource Warnings</td>
<td>+19%</td>
</tr>
<tr>
<td>Theft</td>
<td>+27%</td>
</tr>
<tr>
<td>Hazardous Conditions…</td>
<td>+27%</td>
</tr>
<tr>
<td>Domestic Violence</td>
<td>+28%</td>
</tr>
<tr>
<td>Thermal Area Violations</td>
<td>+35%</td>
</tr>
<tr>
<td>Pet Violations</td>
<td>+61%</td>
</tr>
<tr>
<td>DUI</td>
<td>+62%</td>
</tr>
<tr>
<td>Parking Complaint</td>
<td>+67%</td>
</tr>
<tr>
<td>Property Damage</td>
<td>+86%</td>
</tr>
<tr>
<td>Vandalism</td>
<td>+88%</td>
</tr>
<tr>
<td>Wildlife Violations</td>
<td>+96%</td>
</tr>
<tr>
<td>OB Camping</td>
<td>+177%</td>
</tr>
</tbody>
</table>

**Graph:**
- Motor Vehicle Accidents with Injuries: UP 61% OVER 2014
- Life Flights: UP 24% OVER 2014
- Emergency Medical: UP 37% OVER 2014
- Search & Rescue: UP 167% OVER 2014

**Source:** Institute for Tourism & Recreation Research, University of Montana
Glacier National Park

5-Year Glacier National Park Visitation

- 2012: 2%
- 2013: 7%
- 2014: 1%
- 2015: 25%
- 2016p: 

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Every month in 2016 shattered the same month of the previous year.
CLOSED

Aug. 19, 2016 - Yellowstone River
Nov. 8, 2016 - Tiber Reservoir, Canyon Ferry, Glacier National Park & Blackfeet Reservation waters

• Parasite in mountain Whitefish found
• Mussels, Invasive species, found
Montana Trends

Ski Area Visits

<table>
<thead>
<tr>
<th>Year</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010-11</td>
<td>9%</td>
</tr>
<tr>
<td>2011-12</td>
<td>-6%</td>
</tr>
<tr>
<td>2012-13</td>
<td>3%</td>
</tr>
<tr>
<td>2013-14</td>
<td>7%</td>
</tr>
<tr>
<td>2014-15</td>
<td>-10%</td>
</tr>
<tr>
<td>2015-16</td>
<td>4%</td>
</tr>
</tbody>
</table>

% change 2015-2016 in MT’s National Park System

- Big Hole: 5%
- Grant Kohrs: 6%
- Little Bighorn: 4%
- Yellowstone: 4%
- Glacier: 25%

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Montana Airport Deboardings

All Airport Deboardings:
2012 – 2016p

Helena Deboardings:
2012 – 2016p

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Montana Airport Deboardings

All Airport Deboardings: 2012 – 2016p

-2% 9% -3% 4%

Missoula Deboardings: 2012-2016p

-2% 12% 4% 8%
Montana Airport Deboardings

All Airport Deboardings: 2012 – 2016p

Kalispell Deboardings: 2012 – 2016p
Montana Airport Deboardings

All Airport Deboardings: 2012 – 2016p

Bozeman Deboardings: 2012-2016p
Montana Airport Deboardings

All Airport Deboardings:
2012 – 2016p

Butte Deboardings:
2012 – 2016p
Outlook 2017

• MT Tourism business annual outlook survey
  • 57% expect an increase
  • 36% expect to stay the same
  • 7% expect a decrease

• US Travel Forecast
  • +2% leisure travel
  • -0.6% business travel
Thank you!

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