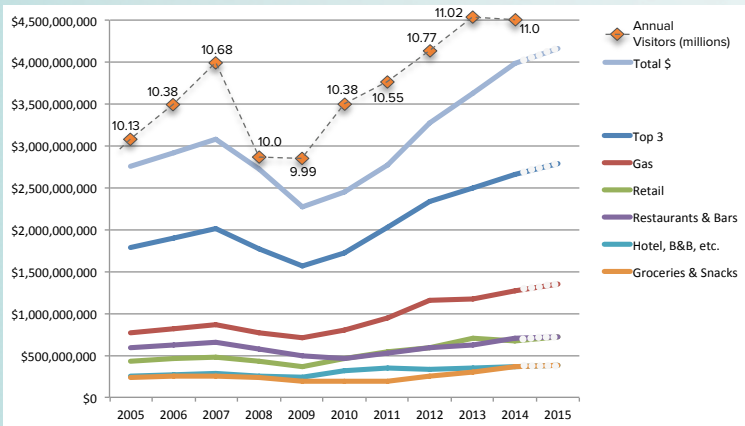


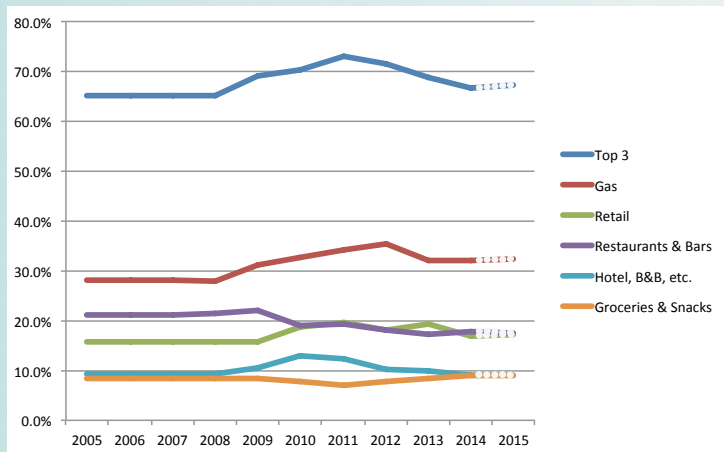
Montana Tourism: Recent Trends and Highlights



Since 2010:

- Total non-resident spending has increased by **over 52%**
- Total visitors have increased by **less than 6%**

Total non-resident spending will likely exceed **\$4 billion** in 2015



Since 2005, **Gas, Retail** and **Restaurants & Bars**:

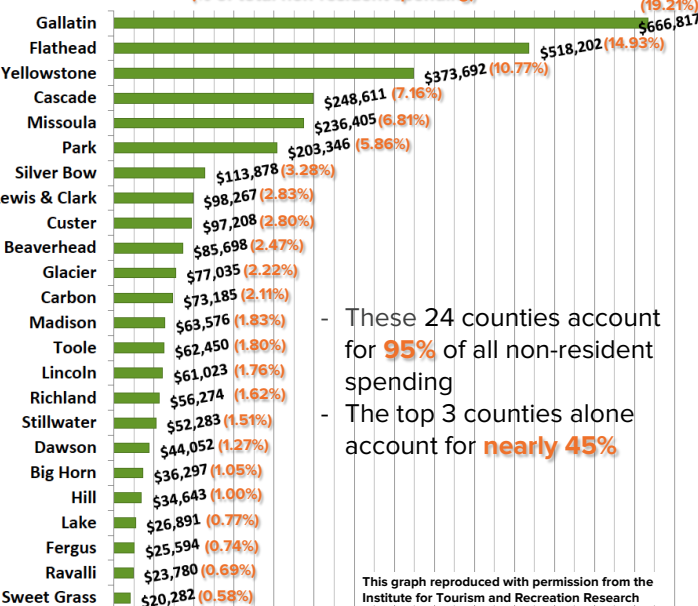
- Have been the **Top 3** non-resident expenses
- Together account for **nearly 70%** of all non-resident spending annually

Hotels, B&B and similar accommodations:

- Accounted for **less than one-tenth** of all non-resident spending in 2014
- Will likely be **exceeded** by Groceries & Snacks as the #4 expense for non-residents in 2015

2012-2013 Estimate of Nonresident Traveler Spending per County

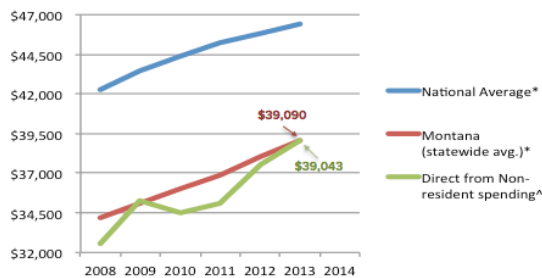
Counties with \$20 million or more
(% of total non-resident spending)



- These 24 counties account for **95%** of all non-resident spending
- The top 3 counties alone account for **nearly 45%**

This graph reproduced with permission from the Institute for Tourism and Recreation Research

2008-2013: Average Annual Wages



* Source: Annual Occupational Employment Statistics (U.S. Bureau of Labor & Statistics)
^ Source: Annual Nonresident Traveler Economic Contribution (ITRR, Univ. of Montana)

Jobs directly supported by non-resident spending have produced an average annual wage that:

- Has been **< 5%** below the state's average annual wage since 2008
- Has been **< 1.5%** below the state's average annual wage in 2012 & 2013
- In 2013, exceeded the average annual wage of **more than half** of all major occupational categories in Montana