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Travel and Recreation in Montana: 2013 in Review and 2014 Outlook

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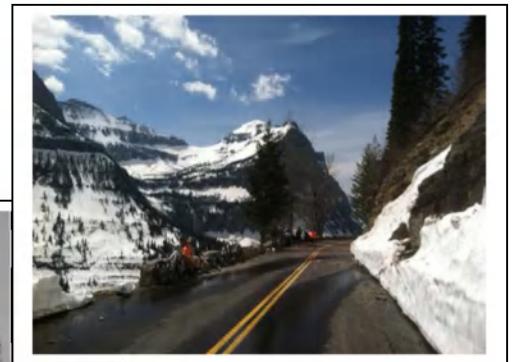
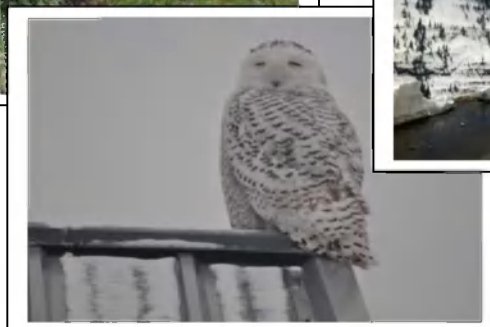
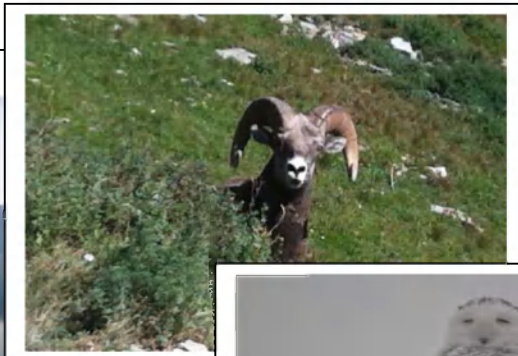
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2013 Review and 2014 Outlook

2013 in Review

This report provides quick and easy-to-read graphs presented with short descriptions of various indicators of the travel and recreation industry in Montana.

Travel and Recreation in Montana





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2013 in Review and 2014 Outlook: Travel and Recreation in Montana

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Research Report 2014-1

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Executive Summary: 2013 Montana Tourism

2013 was an interesting year. Shutdowns seemed to have affected the numbers that were down. First, the government shutdown in October for 16 days probably kept the national parks from having record visitation in Montana. The Billings Airport was shut down for six consecutive weekends in July and August, causing the overall deboardings in Billings to be down 11 percent for the year. Overall, nonresident visitation in Montana was up slightly and spending was up substantially in 2013.

What was up in 2013 compared with 2012 numbers?

- +2% Nonresident visitation
- +4% Q1 quarterly spending
- +5% Q2 quarterly spending
- +20% Q3 quarterly spending
- +0.5% MT rooms sold
- +3.2% ADR - Average daily room rate
- +2.6% Skier visits

What was down in 2013 compared with 2012 numbers?

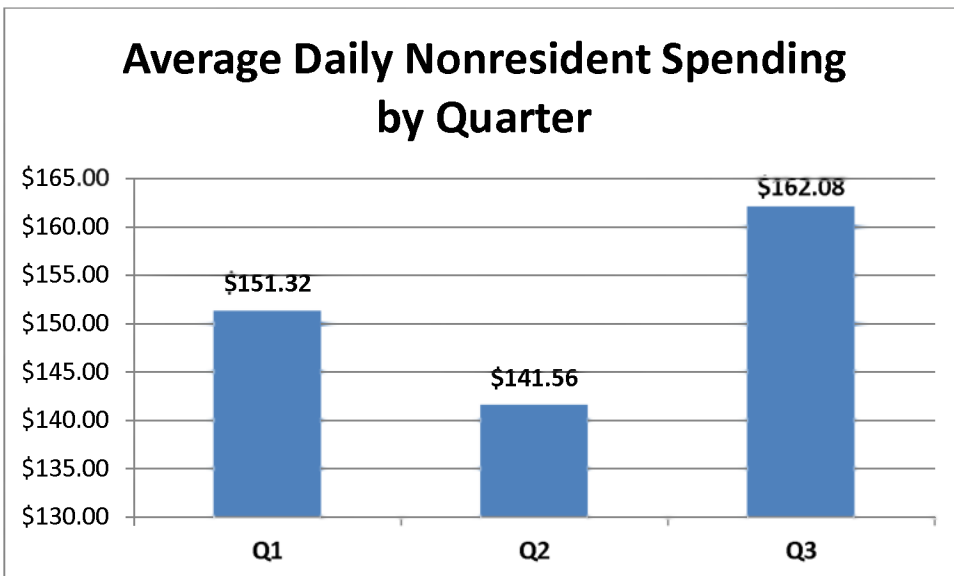
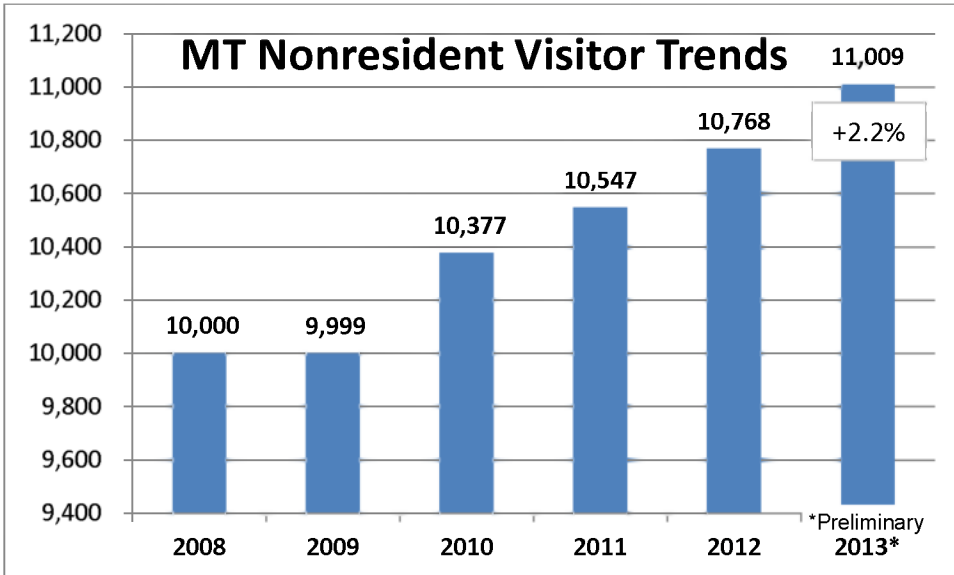
- 5% MT national park visits
- 2% Airport deboardings
- 1.5% Amtrak ridership

2014 should be another record year for visitation to Montana. Fifty-seven percent of Montana's tourism business owners expect an increase while 39 percent expect to stay the same in 2014. Only four percent believe they will experience a decrease in numbers. At the national level, the U.S. Travel Association is projecting a 2 percent increase in domestic person trips while international visitors to the U.S. are expected to increase 5.4 percent over 2013.

Nonresident Visitation and Spending

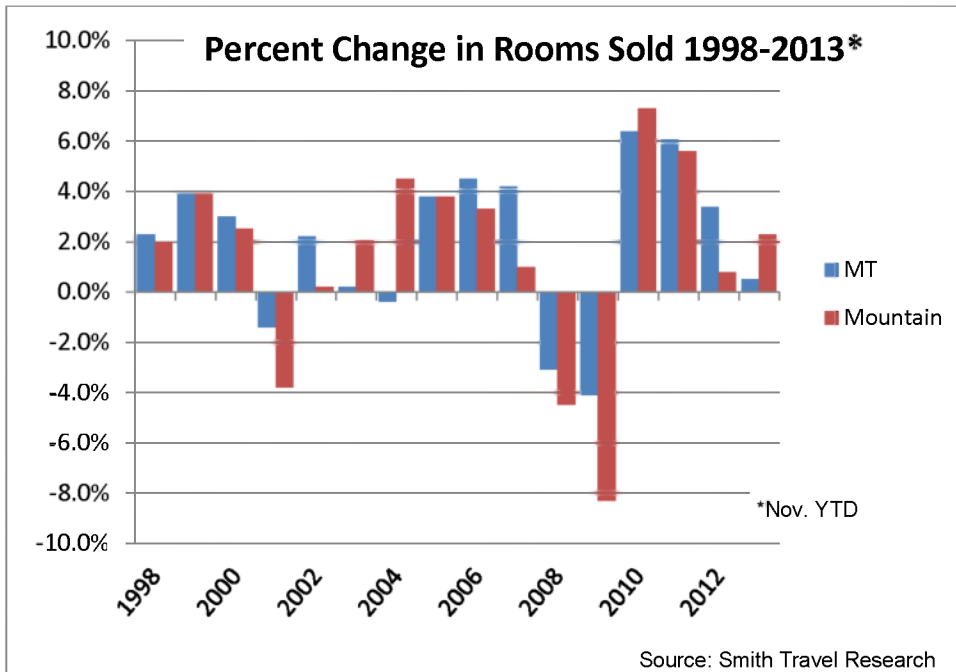
2013 preliminary nonresident visitation to Montana shows a two percent increase over 2012. Ninety percent of visitors arrive in Montana via the roadways with the largest percent entering from the west on I90 (13% of visitors).

Preliminary spending estimates by visitors in the first 3 quarters of 2013 showed increases in each of the quarters over 2012 spending (Q1 +4%; Q2 +5%; Q3 +20%) The dramatic increase in quarter 3 of 20% over quarter 3 of 2012 showed that visitors were spending 17 percent more in gasoline, restaurant/bar, and retail as well as 30 percent more in groceries and snacks.

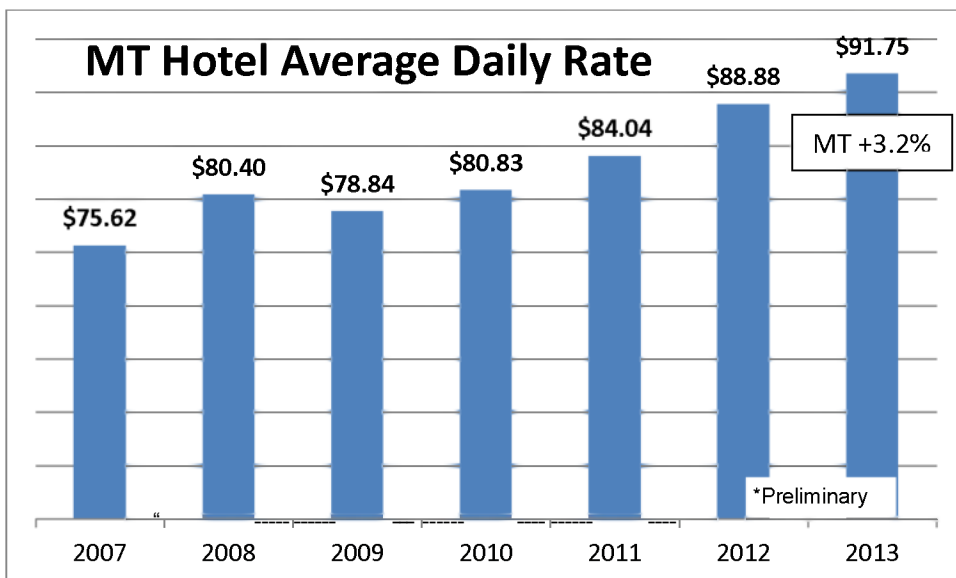


Accommodations

Montana had slower growth in rooms sold compared to the Mountain region during 2013 at only 0.5% compared to the mountain region of 2.3%. However, in 2012, Montana outpaced the mountain region by 2.5 percent. Overall, Montana tends to keep pace with the mountain region in percentage change from year to year.



* Mountain Region=MT, ID, WY, CO, UT, NV, AZ, NM

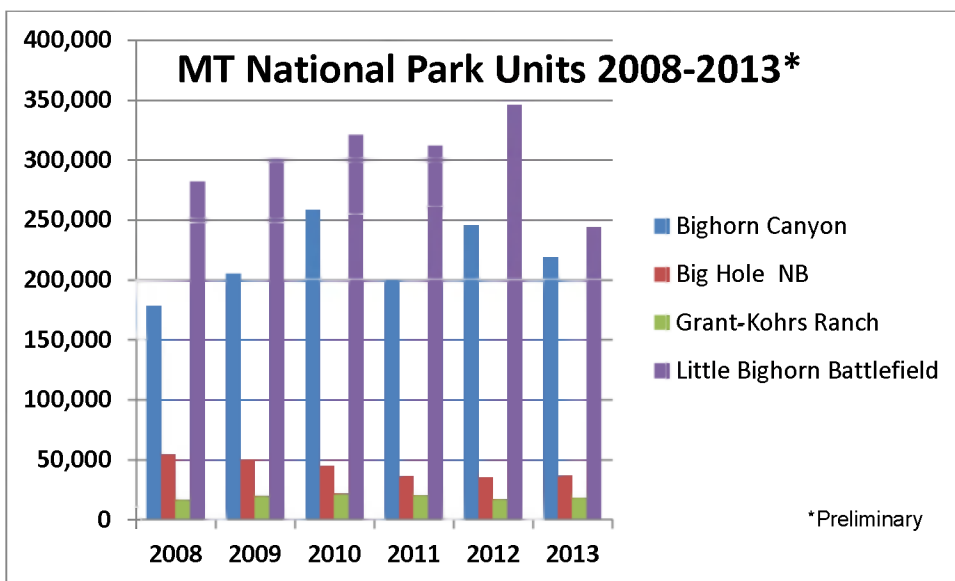
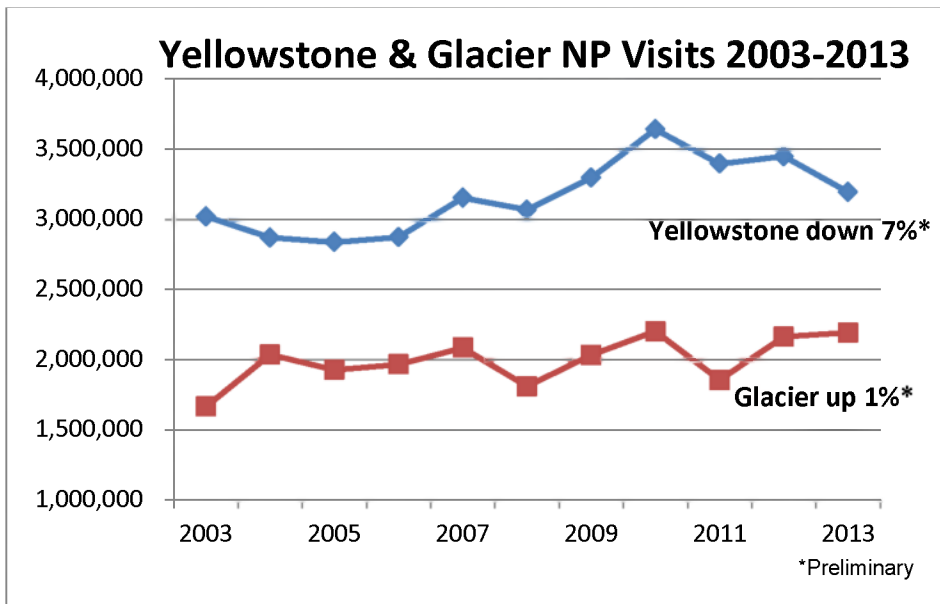


Montana's average daily rate for hotel rooms has been on a slow and steady increase each year (except 2009 during the height of the recession). Accommodations have a variety of rates from group rates, to special discount rates to rates for walk-ins. The average daily rate simply reflects all rates. It does not indicate that this price is what the consumer can expect to get throughout Montana.

MT National Parks

Preliminary numbers indicate that overall National Park unit visitation in Montana was down 5% in 2013 compared to 2012. Yellowstone drove this downward trend; however, 2013 visitation numbers in Yellowstone reflect the park's most recent data related to numbers of people per vehicle. This change was most likely the sole reason for the drastic decrease.

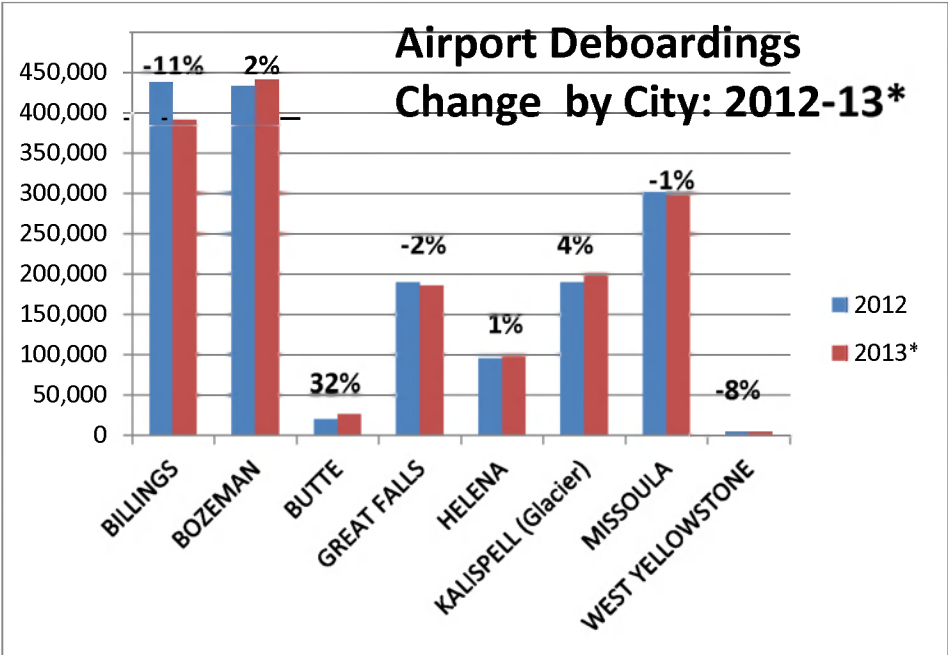
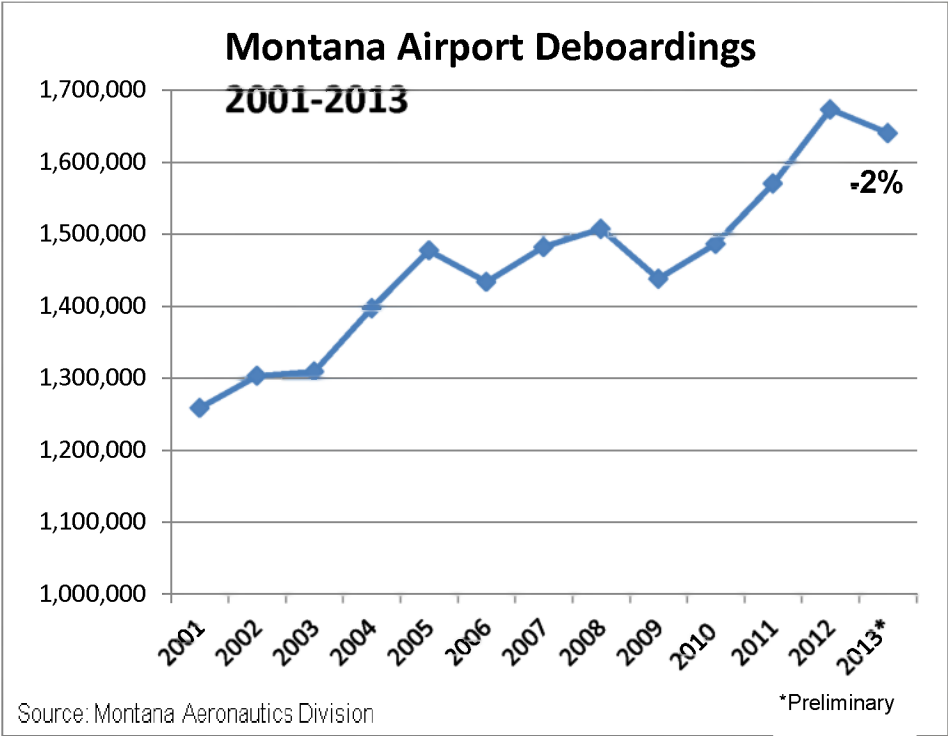
Despite the 16-day federal government shutdown in October 2013, three of the six park units in Montana still recorded an increase: Glacier National Park (+1%); Big Hole National Battlefield (+5%); Grant Kohrs Ranch (+8%). The other three units were down: Yellowstone (-7%); Bighorn Canyon National Recreation Area (-11%), Little Bighorn Battlefield (-30%).



MT Airports

Montana airport deboardings show a slight decrease of 2% from 2012, but are still above the 2010 levels. Over 1.6 million nonresidents arrived in Montana through the nine airports with regularly scheduled flights.

The Billings airport experienced the largest decline due to the 6 consecutive weekends of closure in July and August for construction and maintenance purposes. Billings has always been the highest volume airport in Montana, but in 2013, Bozeman received that honor. Another notable percent change was at the Butte airport. In February 2013, Butte was designated as an essential air service airport. This allowed for federal subsidies to help maintain consistent flights to and from Butte, sometimes at lower rates than other MT airports.

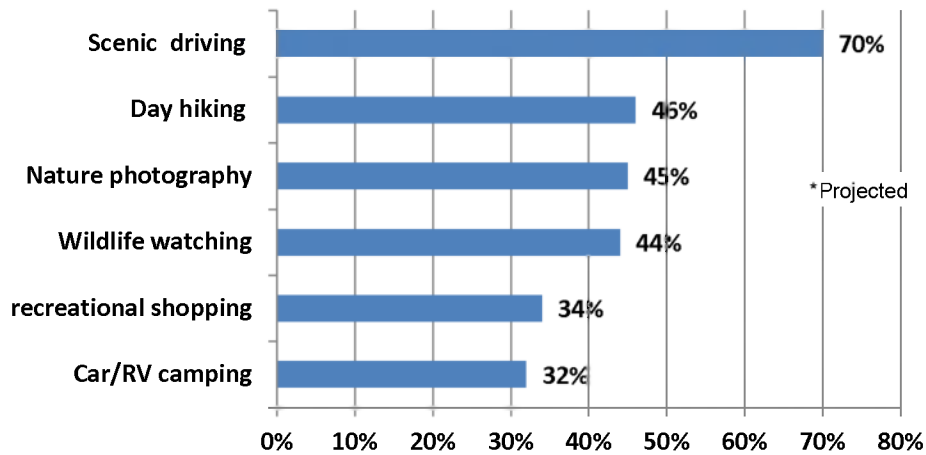


Top Travel Activities

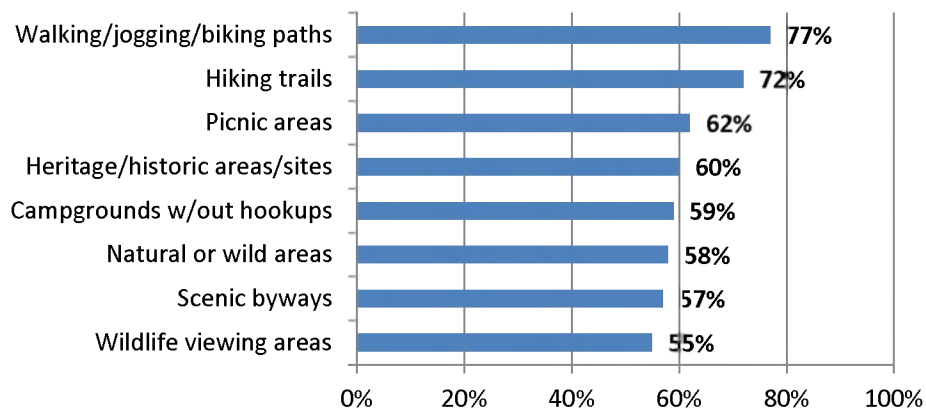
Scenic driving remains on top as the #1 activity by nonresidents who visited Montana in 2013. This is no surprise since ALL driving in Montana is scenic and everyone can do it! Beyond that universal activity, we see that outdoor recreation continues in the top realm of visitor activities (except the recreational shopping activity, which for most travelers is another universal activity).

A study of residents around the state shows that they, too, are very active in the use of outdoor recreation facilities and areas. With 77% of residents using paths for walking, jogging, and biking, and 72% using hiking trails, Montanan's are on the go outside. A study conducted for MT State Parks: <http://www.itrr.umt.edu/Research2013/SCORPResidentReport.pdf> shows that 95% of Montanan's say outdoor recreation is important to their personal quality of life.

Nonresident Activities Q1-Q3 2013

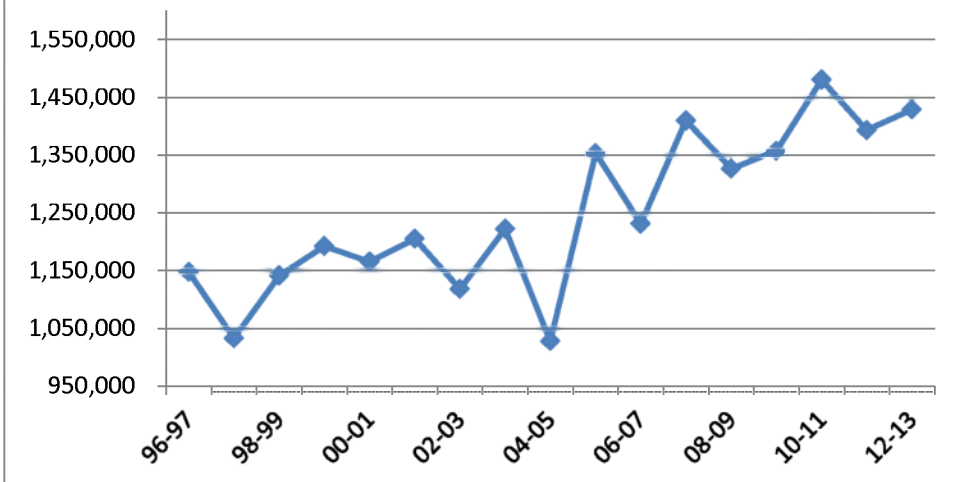


MT Resident Household use of Facilities and Recreation Areas in the State



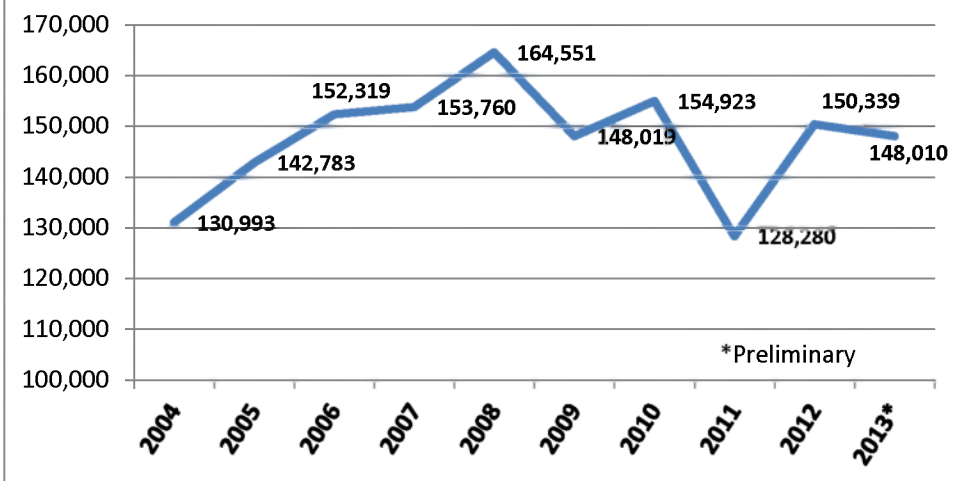
Skier Visits & Amtrak Ridership

Montana Ski Area Visits 1996-2013



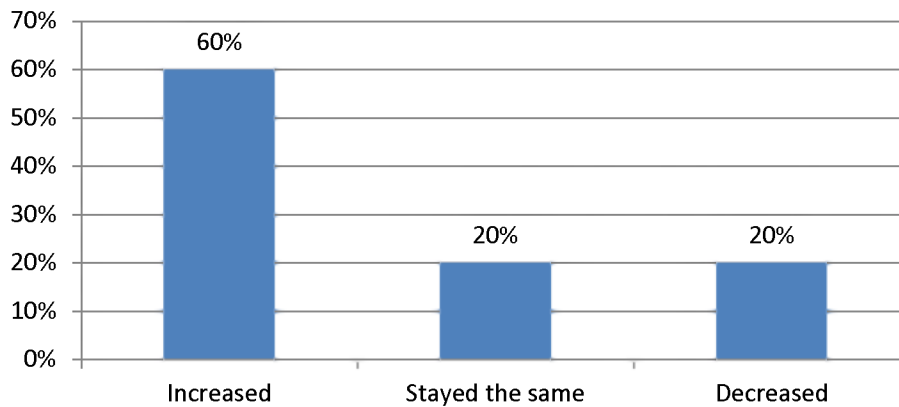
The Montana 2012-13 ski season was up nearly 3% from the 2011-12 season, and was the second highest number of skier visits recorded for Montana at 1.4 million visits. In a 2009-10 study of skiers in Montana, it was found that 35% of all skier visits are by nonresidents. Adjusting for inflation, nonresidents spent \$1,360.35 per ski trip in 2013.

Amtrak Ridership 2001-2013*

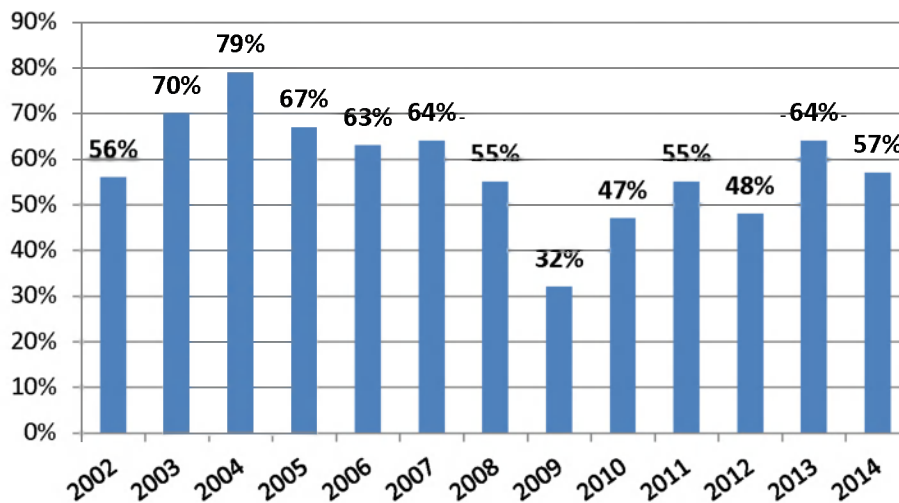


Amtrak ridership rose nicely until the recession and has had a tough time recovering. 2011 was the year the floods in North Dakota halted service for nearly a month. Preliminary numbers for 2013 show a 1.5% decline compared to 2012.

Tourism Business Owners: Customer Change in 2013 vs 2012



Tourism Business Owners % Who Expect an Increase by Year



Tourism Business Owners: 2013 Results & Expected Changes for 2014

2013 was an excellent year for the majority of tourism-related businesses in Montana. Most (60%) experienced an increase in 2013 and many of the respondents said their increase was 10% or higher.

Business for 2014 looks to be fairly positive with 57% of business owners stating they expect to see increases in their customer base. When looking over the years, 2014 owners are not overly optimistic, however they are still more hopeful than six of the 13 years shown in the graph. Only 4% of tourism business owners believe they will experience a decrease in 2014.

Appendix A: Tourism Business Owner comments about 2013 and 2014

Please provide any comments your business experienced this past year AND/OR what 2014 holds for your business.

My wife and I Purchased and Re-opened an existing business that has history in the Gallatin canyon but had fallen on hard times. We remodeled our 7 log cabins and cafe and are open year round, whereas before they were only open May through September. Renamed the business that was once 'Castle Rock Inn' to 'The Inn on the Gallatin'. Had great reviews by customers on Cabins, RV sites, Cafe and web site in 2013 and started advertising in local magazines in the late fall. We are already taking reservation for 2014 summer and are excited for what the future holds for us.

2013 was our first full year and second year in business. We think it will take four or five years to build it to the place we would like to be. The main concern is enough promotion/advertising dollars.

2013 was our first year and we felt we did very well. We anticipate that 2014 will be even better.

2013 was the busiest and best year since the purchase of the business in 2004

2013: Opened 100-room Hilton Homewood Suites, Dragon Boats expanded to 2-day format, added Spartan Race, opened Cabella's, generating higher ADR, REVPAR, and occupancy.

2014: MT Pond Hockey Classic, USAF Thunderbird air show, expanded Spartan, MT High School Rodeo, additional retail openings, will generate growth.

2014 holds improvements to existing public recreation sites which we anticipate will increase visitor experience and therefore increase visitor numbers.

2014 might bring slightly higher numbers because the International Federation of Fly Fishers will have their annual 4 day fair in Livingston.

2014 will be our 50th anniversary so we anticipate an increase in business. We constantly strive for new and better opportunities to serve the public.

Although visitors to our attraction were down roughly 1%, the average amount of money spent per visitor increased by approximately 2%.

As a manager of many and varied public lands, measured increases are uncertain. Increases in uses of all public facilities ebbs and flows with weather, seasonal climate, and events. Completion of Fort Missoula Regional Park and the Missoula to Lolo Trail should provide opportunity for measurable increase in tourism.

As a museum we've got some exciting new exhibits coming up, new staff, new excitement, and lots of hope for another great year.

As purveyors of a large symphony organization that offers year round musical concerts that include a large summer pops concert and a week-long Mozart festival both of which cater to the local and tourist market, we found little increase in our non-local consumer. This is due in part to a lack of effective measurement tools. We would like the MToT to start providing nonresident consumer measurements for performing arts organizations that have broad appeal to the tourist/traveler.

Between the election of a not business friendly president, and broad economic problems and fears, sales are harder to close.

Business improved greatly. Reservations were interesting.. SLOW start in June.. July and Sept. booked in advance. Aug. was dead slow until last week of July. Then, Aug. perked right up. Great (unexpected) Oct.! Nov. very slow. I think 2014 will be better as our local RC TBID will have the new website up and running. MORE exposure is always great!

Business was excellent until the government shut Yellowstone on October 1st. After that we saw a sharp decline and lost a lot of money.

business was steady in 2013 and we are seeing an earlier booking rate for 2014 so anticipating a good season

Canadian travelers produce most of the increases.

Despite a weak winter snow season 2103 was still a good year with a solid summer and fall. 2014 looks to be an even better year with the current snow base promising a good winter season and the historically good summers and falls are expected.

Due to illness in the family we did not work very hard at our tourist business in 2012. My wife died 10/7/12 and my children took over the ranch business. They pushed the rental of our guest house and they had several rentals for four to seven days in the course of the summer. It may have been because we have a fully furnished 1000 sq. ft. house to rent or I think our price was very competitive but we did more business that they expected. They have it organized much tighter and I think they will do more business in 2014.

Due to low water flows the Big Hole experienced last summer, our return business may not be as good as usual.

Economy is just now starting to get to the bottom.

Economy remains weak. Health & financial regulations continue to depress business and add cost. Little to no additional value provided with additional overhead costs. Will continue to hold back on hiring people except for the absolute minimum necessary to stay in business. Business growth and investment will be forestalled for another year at least.

Even with the government shut down in a weaker but important part of our season, we still managed to come out 3% occupancy increase.

Factors affecting our business this year - poor snow conditions, summer weather, wild fires, construction, closing of Yellowstone Park in fall. Next year, we anticipate a better ski season and always pray for no fires. We will have road construction again.

Fewer class reunions and town parties in the area drawing fewer travelers. I expect this coming year to be a constant with no remarkable activities

Good growth in 2013 and anticipating more growth in 2014 with all clients from this year already booked for next year.

Gov. shutdown hurt much needed fall revenues for 2013

Having a mobile friendly website upped our numbers considerably.

Highly dependent on access to national parks, especially Yellowstone, Glacier and Grand Teton. Consumer wariness about January 15th deadline for continuing budget resolutions and into 2014. Have had some cancellations already.

I am a big game outfitter in Region 1. The wolves are depleting the deer and elk populations to the point that I can no longer advertise a 'hunting trip' without an explanation to prospective clients that there is a chance they might not see any game during their visit. I will probably cease to operate my business that I have had for 26 years because of the proliferation of these efficient predators.

I am hoping my numbers remain the same. I have experienced a drop in business each of the past four years. With each year progressively worse. I now believe, it is the 'Brand Name' that is my worst enemy. I have been told by many a guest, what a 'CLEAN' facility I am/have. Also, these same guest comment and compliment us on our customer service as well. It is all the other properties within the chain that do not keep up and let these properties go to shit, that hurt me.

i am optimistic that we have seen the low of lows and things will get better..

I believe that more people will visit all our national parks this year especially in light of our recent government shut down when all parks were closed to the public. Our national parks are part of our freedom to see and enjoy, a true glorious gift from GOD. I believe when such a freedom is taken away, it causes people to realize how precious these places are and they should get to the parks soon before someday the government takes all our precious places for themselves.

I find it extremely irritating to read that 'tourism is up', but it certainly isn't here! It is great our National Parks are getting increased visitation, but it isn't trickling down to the rest of us. This, combined with a complete lack of knowledge from local so-called tourism professionals, does not help tourism up in this area. I have extremely low expectations for visitation next year.

I have added Airbnb and I see that there is an increase year round with this addition. Plus I am collaborating with other businesses like mine for the future.

I just opened so am still developing the business

I only hope and pray that it will increase in 2014. We certainly need it in our area. Thank You.

I only rent in the summer so it pretty much stays the same.

I really thing you are wasting time with these survey they do little to get customers for us

I see continued growth and a wider spread of visitation across the area while still serving the first time visitor to our Montana icons.

I signed up with airbnb.com and attribute a lot of my increase to that link. I did get some guests through the state website though, so that was good!

If the federal government decides to hold our national parks hostage again for political purposes, tourism in Montana will take a serious hit. We lost a whole month of business because of the shutdown.

In August of 2012 I conducted 17 days of float fishing and in 2013 I conducted 0!!

Increased visitation due to opening of new rooms, increased traffic in general.

It is so difficult to get in and out of Billings by plane on short notice it stopped us from permanently relocating there. Reps should push for more flights in and out of Montana it would help business in so many ways

It's difficult to predict given the state of the economy, growing federal deficit, increased health care costs, etc. Folks will not have a lot of money left for vacations and will feel very insecure about spending money.

Just hope for the best.

Livingston Main Street construction for the water main will greatly affect my business. No access... No parking....No business.

Looking forward to 2014 and planning on seeing an uptick in sales

Middle class is being killed by the government.

Montana FWP's limit on elk archery tags in area 700-00 has really hurt our economy. We have more interest in deer for 2014.

My husband and I own a home in Big Sky that we rent. We purchased the home in 2012 so 2013 was our first full year of business. I think our business has been helped by the improving economy and the fact that several Big Sky developments are now out of bankruptcy.

My outfitting business has had an impressive increase in new clients for 2013 and with ongoing marketing efforts I look forward to that trend continuing!

My vacation rental property saw an increase in off-season rentals (Oct-April) by more local guests, Montana, Wyoming, even Washington state, for short stays (long/short weekends)

None really

Not as many park-to-park visitors along this route from international travelers.

Not only have we seen an increase in out of state visitors, we have had an increase in local traffic as more people seemed to be vacationing closer to home with shorter and more frequent stays.

Our focus is Geo wedding tourism. We'd appreciate to be added to a survey. Did you attend a wedding while you visited Montana? Thank you! Say 'i do' in Montana Campaign.

our numbers decreased by 3% but we had construction all down our Broadway Avenue in front of our downtown business district for the majority of summer. Then we had the Rock Creek Fire that lasted for a couple of weeks so we are hoping that 2014 will bring an increase of travelers. Thanks for this survey!

Our rental depends 2/3's on hunters since we are 1 hr. and 20min. from YNP. The white tail deer especially are down in Shields River Valley and the elk are less on our ranch this year due to a shortage of snow pack and rain for irrigating and wolves chasing them into other areas, some of which don't allow hunting! So I expect less renters.....even this year the hunters on our ranch were more than half less!

Our resort tax is up over 10% indicating more visitation. Winter is dependent upon getting snow, so that is difficult to predict. Canadian visitation continues to be strong and will be as long as the dollar is strong.

Our revenue went down due to construction on the roads and our facility

People seem to be buying higher quality merchandise and souvenirs that will last longer.

Pessimism and fear of the future do to DC and the financial communities.

Presently we are looking to add winter business, something that is lacking in our area.

Ravalli county has established a TBID district. We are a few weeks from launching our own website to drive tourists to visit The Bitterroot Valley. We are actively working on Branding & Billboard signage as well. I think this will bring more traffic to the area and increase lodging numbers.

Really exciting trends in Big Sky. Bookings are up in lodging and price per night is on the rise...

Received a special events grant that allowed a great increase in ads and computer presence. Will be building on the success for next year.

Red Lodge suffered due to construction...this will likely happen again next summer. We are increasing our marketing to try and combat this issue.

Spring months were slower than 2012 but fall months have been higher than 2012. Anticipate a 3% growth rate in 2014 due to price increases.

Tax law changes are going to challenge us to find ways to help our clients maintain their standard of living.

The biggest complaint we have heard generally is that out-of-state hunters who used to hunt in Montana now do not because of the out-of-state hunting licenses, i.e., cost.

The business was down consistently from August 2012 through July 2013 when comparing August 2012 to August 2011, comparing Sept. 2012 to Sept. 2011, comparing Oct. 2012 to Oct. 2011, etc. We believe this decrease was a direct result of the terribly Mustang fire, which scared all the customers and potential customers away with the terrible air quality. However, we are optimistic that our business will increase in 2014 with our continuous improvements and consistent marketing to target markets, combined with the marketing efforts of the Ravalli County TBID.

The economy is not good. Even with fewer tourists, the ones that did stop by spent much less money. The two week government shut down killed us. The rest of October was the worst we have ever seen.

The government shut down resulted in lost business. Hopefully this will not happen again.

The government shutdown this Fall definitely hurt our business, and it has been a slow climb to reclaim our pace. It will take longer than anticipated to get our momentum back up to where it was before the stupid government's interference.

The number of motel rooms in Shelby has doubled with one existing motel expanding and another new motel being built. Also, there has been other motel development in the communities around Shelby. My business is down 80% and I'm losing money while our local government is offering tax incentives to those competing with me and other existing motels, I don't make enough money to pay my Utilities, Insurance and taxes.

The operation of the Nevada City Museum and the Montana Heritage Commission impact our small area hugely. By not opening to the public longer in the spring (May) and later into Fall (through September) coupled with lack of display interpretation, display content and follow through with Living History interpretation, tourists coming to and passing through Alder Gulch are not spending more time here. While several businesses and attractions in the area struggle to meet tourism needs, the Commission management lacks understanding of the area, the incredible display opportunities and basic desire to offer a quality experience to visitors. Until they develop and follow-through with an understanding of tourism importance here, Virginia City and Nevada City will continue declining in return visits by tourists.

The organization is a Tribal Government with an Enterprise called Island Mountain Development Group. The business is expanding to include a Hotel and truck stop in the next three years at the junction of highway 2 and route 66. Traffic could increase before that time if our tribe were to include promotional tours of our Yellowstone Bison herd.

The percentage figure (9% increase in 2013 over 2012) is consistent in three things I am involved in: walking tours, chamber of commerce trolley tours, and Mai Wah Museum visitation. Total visitor count that I was personally involved with (≈ 90 minutes per visitor, in groups) = 2,360.

The price of fuel will dictate our numbers.

The price of gas is a real deterrent to travelers. The government shutdown hurt us also.

The shutdown of Glacier Park cost us several thousand dollars in revenue. We had 5 cancellations the first day and did not have a single guest for the balance of October. I will never vote Republican.

The shutdown of YNP in October by Obama greatly affected our business in a negative way.

The web site 'RV PARK Reviews' brought in a lot of new customers and we had a very good return of existing customers.

This is the first year I have been in business so there is nothing to compare in 2012.

This is the first year in 7 years that we didn't increase visitor numbers. Fires and fishing restrictions in the Bitterroot Valley were impactful to tourism this summer.

This year my season began in April with two reservations but ended in Sept. In other years, my guests went into Oct and a few in Nov....but thank goodness really that they did not book at our place since the Park got closed for those weeks during the gov't shutdown that cost the TAXPAYERS dearly!

Too early to judge. We have no large advanced bookings, which we had in 2013. However we have expanded our web exposure to include overseas visitors. Visitors were up but days stayed were the same.

Too many Asians for a guest ranch experience by others.

Visitors to our cabins traveled from much greater distances this year with a significant increase in guests from the East Coast.

We added another location to our vacation rental business & saw our revenue almost double. I believe 2014 will match 2013, but this will be our cap

We anticipate a lot of growth in our county due to the influx of people interested in the oil industry which is exploding in Eastern Montana. We expect to remain busy throughout the next few years working to meet the needs of our community and support the expected increase in tourism, new business, housing, etc.

We are a 24 unit budget motor inn with a very nice return business throughout the year however our 'tourist season' is dictated by the opening and closing of the Glacier National Park so we are always at the mercy of mother nature herself. Sadly this year she was good but our government shutdown of national parks cost us cancellations we had in October. And potential business we usually get, hopefully 2014 will not be a repeat. We are too small to take those kinds of hits.

We are a new business and do not have data for 2012. 2014 should be an increase for us

We are better organized and able to serve our visitors.

We are continuing to receive lots of positive feedback about our food and atmosphere. I think it will continue.

We are seeing more mobile traffic than in the past.

We are very weather dependent with most of our business in the winter. Last winter was slow in coming, short, and left early. Now many customers are a bit gun shy to book trips

We doubled the size of our business so we expect our clientele to also change.

We expanded some of our sites, thus cutting down on the number of actual camper nights that we had available so anticipated a decrease in numbers have experienced an 8% increase in revenue because of better site offerings.

We feel business will remain about the same. We are impacted a lot by Canadian travelers and even though the exchange rate isn't as advantageous for CDNs now, it is still good and they are still coming.

We had more repeat customers, esp. related to those looking at, or having children who decided to attend MSU.

We have an aging county and in our business that should be beneficial however we are seeing a decline in numbers of seniors staying in the valley due to options which is what we provide. I hope we can see a turnaround in senior services available to encourage them to stay.

We have recently remodeled our sleeping rooms and we are seeing a great benefit from doing so. We are finishing the remodel in winter/spring 2014.

We have three luxury log cabins to rent, so we are limited as to space, but would like to rent the cabins more days than we did last year.

We hope that tourism will increase in Helena during its 150th Anniversary celebration. A number of organizations are collaborating on a series of events through the year, and we hope they will be widely advertised & attended.

We increased our nights booked by 49.6% and expect a 30% increase for 2014.

We operate a tour business in Yellowstone and were hoping that we were going to have a banner year, since it was our 20th, but that didn't happen. The park service opened more permits this year, and that was one of the reasons. We also were shut out during October which cost us about \$10,000. Who knows what is going to happen next year, there are so many new rules coming out and am getting tired of constantly trying to figure out what we are going to make each year. Tough to plan ahead.

We pre-booked and received guaranteed reservations for the summer season 2014 quite a lot earlier than we did in 2012 and 2013 for the same period. This tells us that our guests seem more confident about making secure plans to travel and take a planned vacation.

We raised our lodging prices yet experienced about the same number of nights stay, so we benefited to a degree over last year.

We raised our rates to compare better with our equals and we saw a great increase in what we could offer and what others increased.

We recently expanded our ranch to include outdoor weddings and lodging opportunities in addition to our traditional cattle operation. We are completely booked for the 2014 wedding season and are planning to refurbish our historic barn to host indoor events.

We saw an increase in people coming to Montana specifically to tour businesses like ours.

We sign a large contract with a large business

We will attempt to install 2 Highway Billboards this spring.

We've done a bit more advertising and expect that will bring higher numbers, although I'm not sure if we can handle them!

With lots of new changes for 2014, we anticipate increased visitation.

With the economy and the massive increases in health insurance rates because of Obama care I'm thinking folks won't have the money for much travel.

would have been better except for Gov. shutdown

Xanterra in and GPI out?!?!? Both scary and dangerous. I'm watching this transition closely.

Yellowstone Nat'l Park shutdown kept increase from being higher.
