

Economic Outlook & Revenue Assessment

“Importance of Tourism in Idaho”

2006 A Great Year

■ Lodging Revenue up

9.50%>

- \$173.7 m summer 2006
- \$158.6 m summer 2005



■ Best Two Year Run Since Early 90's

- 2005 & 2006
- 1993 & 1994

17.56%>

20.78%>

Tourism is Economic Development

- Tourism Economic Impact \$2.97 billion
 - \$484 m Lodging
 - \$546 m Food/Beverage
 - \$1.94 b Transportation, Entertainment, Shopping
- 5% of Idaho's Gross State Product
- \$176 m in State & Local Taxes
 - \$92 m Sales Taxes



Tourism Means Jobs

- 68,839 Supported Jobs
 - 47,203 Direct Employment
 - 9,679 Indirect
 - 11,957 Induced
- Direct Employment Accounts 7% States Non-Agricultural Employment
- \$728 m in Wages



Global Insights 2004

Providing a Range of Opportunities

- 10% Jobs Manager of Higher
- Career Advancement
- High Touch Industry
- First Job Experience for Many
- Second Income Opportunity
- Part Time
- Various Skill Set Needed & Developed



Destination for 25.7 Million Visitor

- Tamarack Resort/Valley County
- Coeur d'Alene/N. Idaho
- Sun Valley/Blaine County
- Silver Mountain
- Teton County/Island Park
- Lewiston



Contributing Factors for Tourism

- Winter Snow/Summer Water
- Regional Travel is King
- Return of International
- Strong Economy/Business
- Niche Market Growth



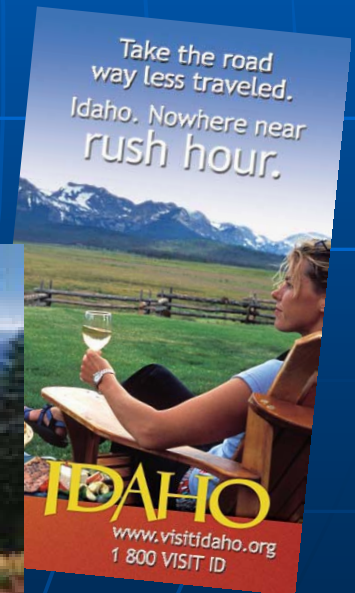
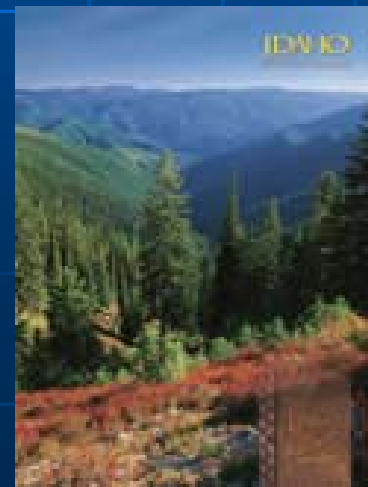
Tourism Reflects Idaho Lifestyle

- Lifestyle vs Quality of Life
- Investments Improve Life for Residents



Factors Influencing Tourism

- Federal Land Management Policy
- Private/Public Sector Investment
- Marketing Driven Industry



Next 18 Months

- Oct/Nov/Dec Lodging 9.74%
- Good Start to Winter
- Continued Strong Economy
- International Visitation to Grow
- Niche Markets Expanding
- 2010 Winter Games



THANK YOU

Questions?