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### 2015 Nonresident Visitation, Expenditures & Economic Impact Estimates: Estimates by full year, quarters, trip purposes, and international visitors

Kara Grau

*The University of Montana - Missoula*

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# 2015 Nonresident Visitation, Expenditures & Economic Impact Estimates

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Estimates by full year, quarters, trip purposes &  
international visitors\*

Kara Grau, M.S.

9/21/2017

A collection of 2015 full year and quarterly estimates of nonresident visitation, expenditures by nonresident travelers, and economic impact estimates, including expenditures by purpose of trip, airport of arrival, and international visitors.

Revised, see Author Note, page ii

## **Visitation, Expenditures & Economic Impact Estimates** *Revised*

Prepared by

Kara Grau, M.S.

Institute for Tourism & Recreation Research  
College of Forestry and Conservation  
The University of Montana  
Missoula, MT 59812  
[www.itrr.umt.edu](http://www.itrr.umt.edu)

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# 2015 Nonresident Visitation, Expenditures & Economic Impact Estimates

2017

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### *Author note about revised numbers:*

*ITRR has recalibrated numbers for 2015 and 2016 to reflect final numbers. These changes were needed due to an over-estimation of spending behavior in three categories. Subsequently, all three categories are downward adjusted. The new adjustment brings the categories in line with available secondary data estimates.*

- *Made in MT and Farmers Market estimates were previously based on nonresidents identifying their full trip spending in Montana. These numbers are now divided by their length of stay to obtain daily spending and thus mirror the methods used for the other categories.*
- *Within Licenses, Fees, and Admissions, ITRR surveyors now also ask if they paid for their licenses (hunting and fishing) on line. This increased the estimates. However, because a hunting or fishing license is good for many days, this expenditure is also divided by the visitor's length of stay.*

# 2015 Montana Nonresident Traveler Expenditures & Economic Contribution

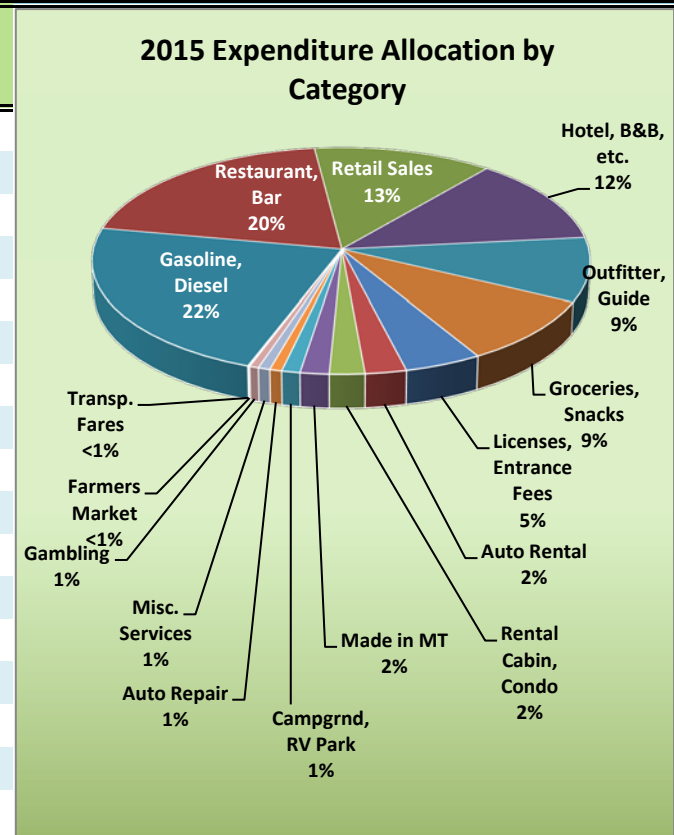
Reviewed

## 2015 Contribution of Nonresident Traveler Expenditures to Montana's Economy

- In 2015, nonresident visitors to Montana spent an estimated \$3.23 billion in the state. (See Table 1 below)
- This \$3.23 billion in local spending directly supports \$2.78 billion of economic activity in the state, and supports an additional \$1.82 billion of economic activity, indirectly. (see Table 2, below)
- The estimated total contribution of nonresident spending to Montana's economy was \$4.60 billion in 2015.

**Table 1 - 2015 Nonresident Traveler Expenditures<sup>1</sup>**

Expenditure Category	Average Daily Per Group <sup>2,3</sup>	Allocation by Category	Total Expenditures <sup>2,4</sup>
Gasoline, Diesel	\$29.48	22%	\$726,620,000
Restaurant, Bar	\$26.40	20%	\$647,640,000
Retail Sales	\$16.70	13%	\$412,890,000
Hotel, B&B, etc.	\$16.52	12%	\$403,490,000
Outfitter, Guide	\$12.25	9%	\$295,800,000
Groceries, Snacks	\$12.15	9%	\$298,020,000
Licenses, Entrance Fees	\$6.04	5%	\$147,010,000
Auto Rental	\$3.19	2%	\$78,310,000
Rental Cabin, Condo	\$2.78	2%	\$66,970,000
Made in MT	\$2.22	2%	\$54,770,000
Campground, RV Park	\$1.43	1%	\$34,910,000
Auto Repair	\$0.93	1%	\$22,970,000
Misc. Services	\$0.89	1%	\$22,310,000
Gambling	\$0.70	1%	\$17,290,000
Farmers Market	\$0.13	<1%	\$3,030,000
Transportation Fares	\$0.04	<1%	\$920,000
<b>Estimated Total</b>	<b>\$131.85</b>		<b>\$3,232,960,000</b>



<sup>1</sup>Spending data are gathered via on-site surveys of nonresident travelers at airports, gas stations, and rest areas in MT.

<sup>2</sup>Data are collected quarterly. Therefore, avg. daily expenditures are weighted averages of quarterly figures. <sup>3</sup>Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups. <sup>4</sup>Expenditure category totals may not add to year total due to rounding.

**Table 2 - 2015 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$2,777,180,000	\$939,970,000	\$882,070,000	\$4,599,220,000
Employment (# of jobs)	38,340	6,800	7,260	52,400 *
Employee Compensation	\$816,250,000	\$204,800,000	\$234,760,000	\$1,255,810,000
Proprietor Income	\$113,370,000	\$53,650,000	\$40,140,000	\$207,160,000
Other Property Type Income	\$347,260,000	\$158,310,000	\$158,970,000	\$664,540,000
State & Local Taxes	-	-	-	\$191,700,000

**Direct impacts** result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

**Industry Output** is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

\* **CHANGE:** The IMPLAN 2015 data set incorporates more data sources than previous data sets, as well as more involved methods of estimating Proprietor vs. Wage & Salary Employment. Comparison to years prior to 2015 is not advised.

Montana Nonresident Traveler Expenditure Profiles

Average 2015 Daily Expenditures by Purpose of Trip<sup>^</sup>

Primary Purpose of Trip

	All Travelers	Vacation	VFR <sup>1</sup>	Pass-Through	Business	Shopping*	Other*
Sample size	14,082	4,957	2,481	4,238	1,748	289	359
Nonresident Travelers	11,730,000	4,130,000	2,070,000	3,530,000	1,460,000	240,000	300,000
Group Size (people/group)	2.19	2.58	2.12	2.06	1.48	2.15	2.04
Length of Stay (nights)	4.59	6.12	6.49	0.94	6.46	0.57	6.97
% of All Travelers in 2015	100%	35%	18%	30%	12%	2%	3%
Gasoline, Diesel	\$29.48	\$23.96	\$17.51	\$46.23	\$24.52	\$32.61	\$27.23
Restaurant, Bar	\$26.40	\$35.79	\$29.39	\$13.44	\$28.52	\$16.67	\$22.60
Retail Sales	\$16.70	\$19.39	\$19.20	\$6.26	\$16.20	\$104.76	\$25.04
Hotel, B&B, etc.	\$16.52	\$20.06	\$9.99	\$14.06	\$24.62	\$6.43	\$15.19
Outfitter, Guide	\$12.25	\$28.85	\$4.32	\$0.43	\$3.90	\$0.00	\$2.90
Groceries, Snacks	\$12.15	\$16.30	\$14.17	\$6.51	\$8.57	\$21.83	\$12.99
Licenses, Entrance Fees	\$6.04	\$17.05	\$4.34	\$0.89	\$2.19	\$1.54	\$3.97
Auto Rental	\$3.19	\$3.76	\$3.28	\$0.25	\$9.46	\$0.14	\$1.81
Rental Cabin, Condo	\$2.78	\$5.88	\$2.36	\$0.40	\$1.07	\$0.00	\$0.92
Made in MT	\$2.22	\$2.95	\$2.71	\$1.31	\$2.01	\$0.58	\$2.21
Campground, RV Park	\$1.43	\$2.47	\$0.54	\$1.03	\$0.34	\$0.05	\$0.35
Auto Repair	\$0.93	\$0.74	\$0.99	\$0.89	\$1.26	\$0.00	\$2.57
Misc. Services	\$0.89	\$1.61	\$0.82	\$0.26	\$0.58	\$1.52	\$3.17
Gambling	\$0.70	\$0.82	\$1.32	\$0.27	\$0.82	\$0.48	\$0.43
Farmers Market	\$0.13	\$0.19	\$0.16	\$0.03	\$0.05	\$0.00	\$0.12
Transportation Fares	\$0.04	\$0.05	\$0.05	\$0.02	\$0.07	\$0.00	\$0.02
<b>Total Avg. Daily per Group</b>	<b>\$131.85</b>	<b>\$179.88</b>	<b>\$111.13</b>	<b>\$92.27</b>	<b>\$124.18</b>	<b>\$186.61</b>	<b>\$121.52</b>

Average Daily Expenditures of Those Who Spent in Each Category<sup>^^</sup>

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=11,989)	Mean <sup>2</sup> of Those Who Spent	Median <sup>3</sup> of Those Who Spent
Gasoline, Diesel	7772	65%	\$45.67	\$38.00
Restaurant, Bar	6369	53%	\$49.34	\$35.00
Hotel, B&B, etc.	4086	34%	\$118.00	\$105.24
Groceries, Snacks	3995	33%	\$36.48	\$20.00
Retail Sales	1882	16%	\$108.28	\$50.00
Licenses, Entrance Fees	1805	15%	\$44.79	\$12.50
Made in MT	1764	15%	\$15.28	\$6.67
Campground, RV Park	1201	10%	\$35.09	\$34.00
Auto Rental	832	7%	\$47.52	\$50.00
Rental Cabin, Condo	525	4%	\$151.05	\$150.00
Outfitter, Guide	426	4%	\$317.95	\$319.05
Farmers Market	395	3%	\$3.33	\$2.51
Misc. Services	284	2%	\$40.79	\$20.00
Gambling	240	2%	\$36.55	\$25.00
Auto Repair	109	1%	\$94.84	\$93.11
Transportation Fares	30	<1%	\$15.57	\$14.83

\*Data are collected quarterly. Therefore, year total group size, length of stay and avg. daily expenditures are weighted averages of quarterly figures.

<sup>^</sup> Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups.

<sup>^^</sup>These figures represent the number and percent of visitor groups who actually spent money in each category. The dollar values are reflective of the actual average amount spent per category.

Spending data are gathered via on-site surveys of nonresident travelers at airports, gas stations, and rest areas in MT. Expenditures represent 24 hours worth of travel group spending.

<sup>1</sup>Visiting friends and/or relatives. <sup>2</sup>Mean, or average, is the sum of the values divided by the number of values. <sup>3</sup>Median is the middle value in a string of numbers, with half of the values higher, and half lower than the median value. \*Small sample size, use with caution.

# Quarter 1, 2015

## Montana Nonresident Traveler Expenditure Profiles

### Average Q1 Daily Expenditures by Purpose of Trip<sup>^</sup>

	Primary Purpose of Trip						
	All Travelers	Vacation	VFR <sup>1</sup>	Pass-Through	Business	Shopping*	Other*
Sample size	2,617	490	451	995	486	97	98
Nonresident Travelers	1,434,000	268,000	247,000	545,000	267,000	53,000	54,000
Group Size (people/group)	2.03	2.87	2.01	1.92	1.48	1.92	1.88
Length of Stay (nights)	3.40	5.88	5.66	0.73	4.67	0.29	4.47
% of All Travelers in Q1	100%	19%	17%	38%	19%	4%	4%
Gasoline, Diesel	\$29.76	\$19.29	\$18.45	\$42.55	\$25.83	\$27.93	\$21.83
Restaurant, Bar	\$25.55	\$53.17	\$24.62	\$12.31	\$30.25	\$15.10	\$21.92
Hotel, B&B, etc.	\$24.62	\$35.55	\$14.97	\$16.95	\$43.07	\$4.35	\$23.42
Retail Sales	\$18.84	\$31.76	\$18.35	\$6.23	\$16.56	\$85.91	\$23.57
Licenses, Entrance Fees	\$15.68	\$75.06	\$9.89	\$0.54	\$4.31	\$0.12	\$5.55
Groceries, Snacks	\$12.59	\$20.11	\$16.50	\$6.20	\$10.75	\$30.68	\$13.25
Outfitter, Guide	\$6.28	\$33.86	\$0.66	\$0.07	\$0.71	\$0.00	\$0.00
Auto Rental	\$4.52	\$8.11	\$2.66	\$0.19	\$12.49	\$0.00	\$4.35
Rental Cabin, Condo	\$3.16	\$13.66	\$1.52	\$0.30	\$1.78	\$0.00	\$0.56
Made in MT	\$2.14	\$4.71	\$2.61	\$0.60	\$2.68	\$0.01	\$3.42
Misc. Services	\$1.52	\$4.31	\$1.54	\$0.14	\$0.46	\$4.67	\$4.18
Gambling	\$0.97	\$1.08	\$1.26	\$0.30	\$1.92	\$1.29	\$0.78
Auto Repair	\$0.17	\$0.22	\$0.25	\$0.16	\$0.14	\$0.00	\$0.00
Transportation Fares	\$0.05	\$0.08	\$0.03	\$0.02	\$0.06	\$0.00	\$0.19
Campground, RV Park	\$0.01	\$0.00	\$0.00	\$0.03	\$0.01	\$0.00	\$0.00
Farmers Market	\$0.00	\$0.00	\$0.01	\$0.00	\$0.00	\$0.00	\$0.01
<b>Total Avg. Daily per Group</b>	<b>\$145.86</b>	<b>\$300.97</b>	<b>\$113.32</b>	<b>\$86.59</b>	<b>\$151.03</b>	<b>\$170.06</b>	<b>\$123.03</b>

### Average Daily Expenditures of Those Who Spent in Each Category<sup>^^</sup>

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=2,188)	Mean <sup>2</sup> of Those Who Spent	Median <sup>3</sup> of Those Who Spent
Gasoline, Diesel	1547	71%	\$42.08	\$35.00
Restaurant, Bar	1177	54%	\$47.51	\$30.00
Hotel, B&B, etc.	735	34%	\$108.38	\$100.00
Groceries, Snacks	735	34%	\$37.46	\$15.00
Retail Sales	321	15%	\$128.17	\$60.64
Made in MT	256	12%	\$18.47	\$8.00
Licenses, Entrance Fees	254	12%	\$135.26	\$74.10
Auto Rental	181	8%	\$54.64	\$55.80
Rental Cabin, Condo	88	4%	\$116.27	\$111.66
Misc. Services	87	4%	\$37.91	\$15.00
Gambling	61	3%	\$34.70	\$20.00
Outfitter, Guide	49	2%	\$277.68	\$324.76
Auto Repair	13	1%	\$28.78	\$43.66
Campground, RV Park	12	1%	\$4.51	\$5.83
Transportation Fares	7	<1%	\$14.18	\$14.81
Farmers Market	3	<1%	\$2.32	\$2.54

<sup>^</sup> Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups.

<sup>^^</sup> These figures represent the number and percent of visitor groups who actually spent money in each category. The dollar values are reflective of the actual average amount spent per category.

Spending data are gathered via on-site surveys of nonresident travelers at airports, gas stations, and rest areas in MT. Expenditures represent 24 hours worth of travel group

<sup>1</sup>Visiting friends and/or relatives. <sup>2</sup>Mean, or average, is the sum of the values divided by the number of values. <sup>3</sup>Median is the middle value in a string of numbers, with half of the values higher, and half lower than the median value. \*Small sample size, use with caution.



**Average Q2 Daily Expenditures by Purpose of Trip<sup>^</sup>**

	Primary Purpose of Trip						
	All Travelers	Vacation	VFR <sup>1</sup>	Pass-Through	Business	Shopping*	Other*
Sample size	3,559	1,099	675	1,152	447	77	103
Nonresident Travelers	3,140,000	970,000	597,000	1,017,000	396,000	69,000	91,000
Group Size (people/group)	2.15	2.53	2.28	1.99	1.50	2.07	1.93
Length of Stay (nights)	4.20	5.54	5.79	1.01	6.78	0.57	6.45
% of All Travelers in Q2	100%	31%	19%	32%	13%	2%	3%
Gasoline, Diesel	\$31.34	\$22.35	\$18.65	\$48.27	\$27.40	\$34.51	\$31.28
Restaurant, Bar	\$24.73	\$34.79	\$29.53	\$11.81	\$29.36	\$17.05	\$17.27
Retail Sales	\$17.87	\$22.97	\$14.24	\$6.83	\$20.73	\$104.45	\$26.51
Hotel, B&B, etc.	\$16.94	\$21.71	\$11.21	\$14.51	\$23.30	\$6.91	\$10.29
Groceries, Snacks	\$11.77	\$15.28	\$14.35	\$7.15	\$7.59	\$31.25	\$11.69
Outfitter, Guide	\$5.59	\$13.23	\$3.07	\$0.27	\$6.47	\$0.00	\$0.00
Auto Rental	\$2.90	\$3.55	\$3.14	\$0.18	\$8.83	\$0.43	\$1.32
Licenses, Entrance Fees	\$2.42	\$4.32	\$2.54	\$0.70	\$2.05	\$1.48	\$3.11
Rental Cabin, Condo	\$1.80	\$4.07	\$1.61	\$0.00	\$1.55	\$0.00	\$1.43
Made in MT	\$1.75	\$2.15	\$2.78	\$0.97	\$1.49	\$0.95	\$1.77
Campground, RV Park	\$1.51	\$2.85	\$0.67	\$1.25	\$0.54	\$0.05	\$0.71
Misc. Services	\$1.19	\$2.01	\$1.28	\$0.24	\$0.94	\$0.24	\$4.74
Auto Repair	\$0.84	\$1.08	\$0.57	\$0.56	\$0.48	\$0.00	\$5.70
Gambling	\$0.83	\$0.93	\$1.50	\$0.36	\$1.03	\$0.00	\$0.88
Transportation Fares	\$0.06	\$0.11	\$0.04	\$0.03	\$0.09	\$0.00	\$0.00
Farmers Market	\$0.05	\$0.06	\$0.09	\$0.02	\$0.00	\$0.00	\$0.12
<b>Total Avg. Daily per Group</b>	<b>\$121.59</b>	<b>\$151.45</b>	<b>\$105.27</b>	<b>\$93.15</b>	<b>\$131.85</b>	<b>\$197.33</b>	<b>\$116.82</b>

**Average Daily Expenditures of Those Who Spent in Each Category<sup>^^</sup>**

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=3,019)	Mean <sup>2</sup> of Those Who Spent	Median <sup>3</sup> of Those Who Spent
Gasoline, Diesel	1982	66%	\$47.75	\$40.00
Restaurant, Bar	1589	53%	\$46.99	\$32.00
Hotel, B&B, etc.	1043	35%	\$110.22	\$100.00
Groceries, Snacks	1001	33%	\$35.48	\$20.00
Retail Sales	460	15%	\$117.37	\$60.00
Made in MT	397	13%	\$13.52	\$7.04
Licenses, Entrance Fees	329	11%	\$22.24	\$10.00
Campground, RV Park	322	11%	\$35.08	\$35.00
Auto Rental	191	6%	\$45.85	\$50.00
Rental Cabin, Condo	109	4%	\$112.12	\$125.00
Misc. Services	78	3%	\$46.11	\$14.00
Outfitter, Guide	71	2%	\$238.97	\$300.00
Gambling	61	2%	\$41.24	\$30.00
Farmers Market	44	1%	\$3.26	\$4.27
Auto Repair	20	1%	\$123.70	\$162.49
Transportation Fares	11	<1%	\$17.24	\$18.24

<sup>^</sup> Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups.

<sup>^^</sup>These figures represent the number and percent of visitor groups who actually spent money in each category. The dollar values are reflective of the actual average amount spent per category.

Spending data are gathered via on-site surveys of nonresident travelers at airports, gas stations, and rest areas in MT. Expenditures represent 24 hours worth of travel group

<sup>1</sup>Visiting friends and/or relatives. <sup>2</sup>Mean, or average, is the sum of the values divided by the number of values. <sup>3</sup>Median is the middle value in a string of numbers, with half of the values higher, and half lower than the median value. \*Small sample size, use with caution.



# Quarter 3, 2015

## Montana Nonresident Traveler Expenditure Profiles

### Average Q3 Daily Expenditures by Purpose of Trip<sup>^</sup>

	Primary Purpose of Trip						
	All Travelers	Vacation	VFR <sup>1</sup>	Pass-Through	Business	Shopping*	Other*
Sample size	5,631	2,840	864	1,347	438	52	86
Nonresident Travelers	5,214,000	2,633,000	803,000	1,246,000	407,000	47,000	78,000
Group Size (people/group)	2.41	2.65	2.20	2.26	1.59	2.83	2.61
Length of Stay (nights)	5.21	6.25	6.95	1.09	8.19	1.19	5.74
% of All Travelers in Q3	100%	51%	15%	24%	8%	1%	2%
Gasoline, Diesel	\$28.91	\$25.27	\$17.18	\$45.61	\$25.48	\$34.06	\$26.32
Restaurant, Bar	\$28.47	\$34.33	\$30.19	\$15.66	\$26.81	\$16.95	\$31.45
Outfitter, Guide	\$18.61	\$33.07	\$8.63	\$0.83	\$4.42	\$0.00	\$3.40
Hotel, B&B, etc.	\$16.24	\$18.51	\$9.50	\$14.41	\$20.26	\$8.20	\$21.46
Retail Sales	\$14.58	\$15.82	\$16.60	\$5.70	\$16.44	\$67.39	\$43.74
Groceries, Snacks	\$12.82	\$15.73	\$14.89	\$5.73	\$10.29	\$17.75	\$15.13
Rental Cabin, Condo	\$3.87	\$5.78	\$4.37	\$0.92	\$0.76	\$0.00	\$0.07
Licenses, Entrance Fees	\$3.78	\$5.25	\$3.73	\$1.37	\$2.08	\$2.48	\$2.47
Auto Rental	\$2.85	\$3.15	\$3.76	\$0.29	\$7.05	\$0.00	\$2.51
Campground, RV Park	\$2.13	\$3.21	\$0.82	\$1.45	\$0.49	\$0.11	\$0.54
Made in MT	\$2.11	\$2.68	\$2.15	\$1.15	\$1.68	\$0.81	\$1.16
Auto Repair	\$1.21	\$0.87	\$1.27	\$1.17	\$3.15	\$0.00	\$3.34
Gambling	\$0.56	\$0.51	\$1.20	\$0.25	\$0.54	\$0.88	\$0.28
Misc. Services	\$0.41	\$0.49	\$0.30	\$0.33	\$0.38	\$0.23	\$0.09
Farmers Market	\$0.22	\$0.31	\$0.29	\$0.05	\$0.12	\$0.00	\$0.10
Transportation Fares	\$0.03	\$0.03	\$0.04	\$0.01	\$0.07	\$0.00	\$0.00
<b>Total Avg. Daily per Group</b>	<b>\$136.80</b>	<b>\$165.02</b>	<b>\$114.92</b>	<b>\$94.93</b>	<b>\$120.02</b>	<b>\$148.87</b>	<b>\$152.06</b>

### Average Daily Expenditures of Those Who Spent in Each Category<sup>^^</sup>

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=)	Mean <sup>2</sup> of Those Who Spent	Median <sup>3</sup> of Those Who Spent
Gasoline, Diesel	3025	62%	\$46.53	\$39.00
Restaurant, Bar	2635	54%	\$52.59	\$40.00
Groceries, Snacks	1714	35%	\$36.41	\$20.00
Hotel, B&B, etc.	1597	33%	\$134.29	\$120.00
Licenses, Entrance Fees	946	19%	\$19.48	\$9.13
Retail Sales	857	18%	\$82.82	\$50.00
Made in MT	844	17%	\$12.27	\$5.00
Campground, RV Park	793	16%	\$37.35	\$35.00
Farmers Market	323	7%	\$3.35	\$2.50
Auto Rental	311	6%	\$44.63	\$50.00
Outfitter, Guide	281	6%	\$322.79	\$300.00
Rental Cabin, Condo	275	6%	\$185.37	\$200.00
Gambling	81	2%	\$33.45	\$25.00
Misc. Services	79	2%	\$25.19	\$20.62
Auto Repair	58	1%	\$101.73	\$122.90
Transportation Fares	9	<1%	\$15.35	\$17.03

<sup>^</sup> Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups.

<sup>^^</sup> These figures represent the number and percent of visitor groups who actually spent money in each category. The dollar values are reflective of the actual average amount spent per category.

Spending data are gathered via on-site surveys of nonresident travelers at airports, gas stations, and rest areas in MT. Expenditures represent 24 hours worth of travel group

<sup>1</sup>Visiting friends and/or relatives. <sup>2</sup>Mean, or average, is the sum of the values divided by the number of values. <sup>3</sup>Median is the middle value in a string of numbers, with half of the values higher, and half lower than the median value. \*Small sample size, use with caution.

**Average Q4 Daily Expenditures by Purpose of Trip<sup>^</sup>**

	Primary Purpose of Trip						
	All Travelers	Vacation	VFR <sup>1</sup>	Pass-Through	Business	Shopping*	Other*
Sample size	2,275	528	491	744	377	63	72
Nonresident Travelers	1,941,000	451,000	419,000	635,000	322,000	54,000	61,000
Group Size (people/group)	1.89	2.22	1.87	1.95	1.36	1.99	1.72
Length of Stay (nights)	4.66	6.77	7.11	0.76	5.79	0.41	11.04
% of All Travelers in Q4	100%	23%	22%	33%	17%	3%	3%
Gasoline, Diesel	\$28.47	\$24.17	\$16.53	\$46.03	\$16.52	\$30.06	\$26.22
Restaurant, Bar	\$23.57	\$31.09	\$29.86	\$12.08	\$28.59	\$16.44	\$20.52
Retail Sales	\$19.51	\$20.11	\$28.50	\$6.51	\$7.33	\$161.89	\$8.92
Hotel, B&B, etc.	\$11.87	\$13.63	\$7.59	\$10.39	\$18.88	\$4.31	\$11.56
Licenses, Entrance Fees	\$10.83	\$38.80	\$4.88	\$0.36	\$0.82	\$0.98	\$5.40
Groceries, Snacks	\$10.59	\$17.18	\$11.95	\$7.33	\$5.32	\$10.59	\$12.35
Outfitter, Guide	\$7.51	\$29.34	\$0.28	\$0.00	\$1.14	\$0.00	\$6.23
Auto Rental	\$3.65	\$3.45	\$2.92	\$0.33	\$12.33	\$0.00	\$0.76
Made in MT	\$3.15	\$3.80	\$3.55	\$2.84	\$2.94	\$0.00	\$3.02
Misc. Services	\$1.41	\$3.54	\$0.88	\$0.21	\$0.41	\$3.65	\$3.87
Rental Cabin, Condo	\$0.95	\$3.39	\$0.31	\$0.00	\$0.17	\$0.00	\$1.26
Auto Repair	\$0.78	\$0.20	\$1.25	\$1.35	\$0.22	\$0.00	\$0.00
Gambling	\$0.74	\$1.69	\$1.34	\$0.14	\$0.00	\$0.28	\$0.00
Campground, RV Park	\$0.32	\$0.87	\$0.19	\$0.21	\$0.01	\$0.00	\$0.00
Farmers Market	\$0.05	\$0.06	\$0.07	\$0.01	\$0.04	\$0.00	\$0.18
Transportation Fares	\$0.02	\$0.00	\$0.07	\$0.00	\$0.04	\$0.00	\$0.00
<b>Total Avg. Daily per Group</b>	<b>\$123.42</b>	<b>\$191.32</b>	<b>\$110.17</b>	<b>\$87.80</b>	<b>\$94.76</b>	<b>\$228.20</b>	<b>\$100.29</b>

**Average Daily Expenditures of Those Who Spent in Each Category<sup>^^</sup>**

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=1,914)	Mean <sup>2</sup> of Those Who Spent	Median <sup>3</sup> of Those Who Spent
Gasoline, Diesel	1219	64%	\$44.71	\$37.00
Restaurant, Bar	968	51%	\$46.60	\$35.00
Hotel, B&B, etc.	711	37%	\$102.75	\$100.00
Groceries, Snacks	545	28%	\$37.22	\$20.00
Licenses, Entrance Fees	277	14%	\$75.49	\$23.39
Made in MT	267	14%	\$22.70	\$7.00
Retail Sales	243	13%	\$153.68	\$100.00
Auto Rental	148	8%	\$47.06	\$50.00
Campground, RV Park	74	4%	\$15.63	\$17.58
Rental Cabin, Condo	53	3%	\$110.40	\$96.05
Misc. Services	40	2%	\$67.36	\$34.45
Gambling	36	2%	\$38.71	\$31.75
Outfitter, Guide	26	1%	\$559.61	\$662.51
Farmers Market	25	1%	\$3.54	\$3.18
Auto Repair	17	1%	\$87.65	\$93.11
Transportation Fares	3	<1%	\$13.21	\$13.21

<sup>^</sup> Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups.

<sup>^^</sup>These figures represent the number and percent of visitor groups who actually spent money in each category. The dollar values are reflective of the actual average amount spent per category.

Spending data are gathered via on-site surveys of nonresident travelers at airports, gas stations, and rest areas in MT. Expenditures represent 24 hours worth of travel group

<sup>1</sup>Visiting friends and/or relatives. <sup>2</sup>Mean, or average, is the sum of the values divided by the number of values. <sup>3</sup>Median is the middle value in a string of numbers, with half of the values higher, and half lower than the median value. \*Small sample size, use with caution.

**Montana Nonresident Traveler  
Quarterly Travel Comparison**

Revised

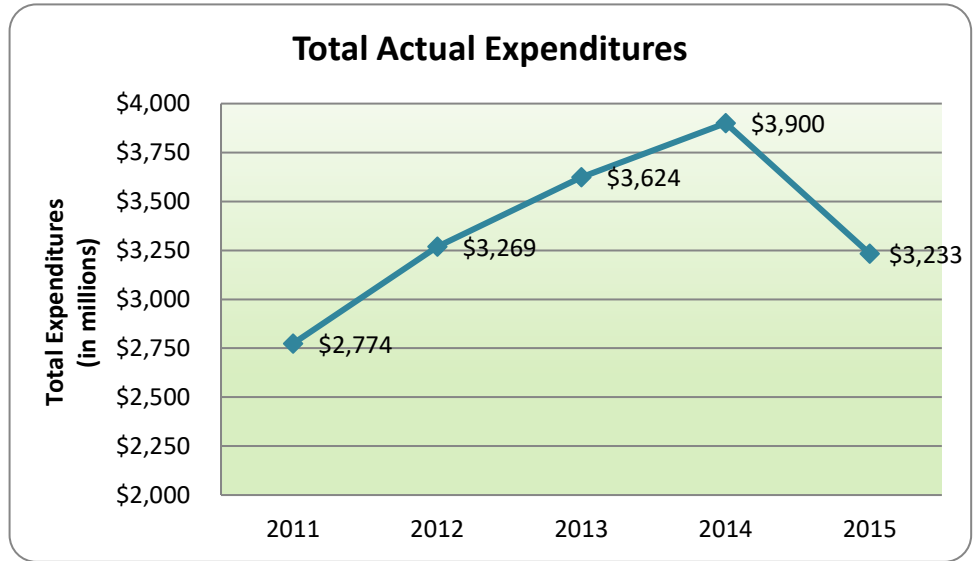
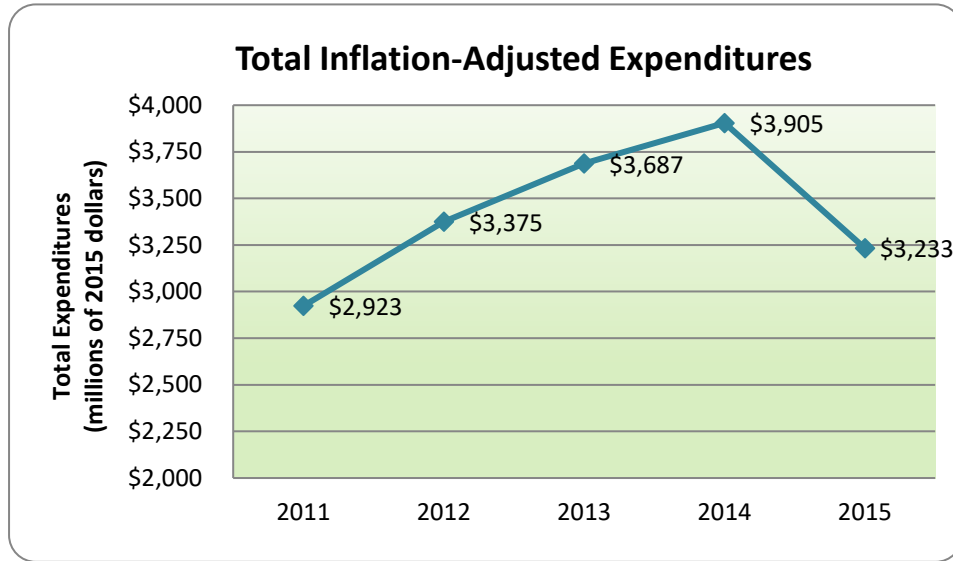
	Quarter 1 (Jan-Mar)	Quarter 2 (Apr-Jun)	Quarter 3 (Jul-Sep)	Quarter 4 (Oct-Dec)	Year Total <sup>1</sup> 2015
<b>Visitation &amp; Length of Stay</b>					
Nonresident Visitors	1,434,000	3,140,000	5,214,000	1,941,000	11,729,000
% of Total	12%	27%	44%	17%	100%
Nonresident Travel Groups	709,000	1,459,000	2,172,000	1,023,000	5,363,000
% of Total	13%	27%	40%	19%	100%
Group Size (people per group)	2.03	2.15	2.41	1.89	2.19
Length of Stay (nights)	3.40	4.20	5.21	4.66	4.59
<b>Expenditure Category<sup>2,3</sup> (Average Daily per Group)</b>					
	<b>Quarter 1</b>	<b>Quarter 2</b>	<b>Quarter 3</b>	<b>Quarter 4</b>	<b>Year Total<sup>1</sup></b>
Gasoline, Diesel	\$29.76	\$31.34	\$28.91	\$28.47	\$29.48
Restaurant, Bar	\$25.55	\$24.73	\$28.47	\$23.57	\$26.40
Retail Sales	\$18.84	\$17.87	\$14.58	\$19.51	\$16.70
Hotel, B&B, etc.	\$24.62	\$16.94	\$16.24	\$11.87	\$16.52
Outfitter, Guide	\$6.28	\$5.59	\$18.61	\$7.51	\$12.25
Groceries, Snacks	\$12.59	\$11.77	\$12.82	\$10.59	\$12.15
Licenses, Entrance Fees	\$15.68	\$2.42	\$3.78	\$10.83	\$6.04
Auto Rental	\$4.52	\$2.90	\$2.85	\$3.65	\$3.19
Rental Cabin, Condo	\$3.16	\$1.80	\$3.87	\$0.95	\$2.78
Made in MT	\$2.14	\$1.75	\$2.11	\$3.15	\$2.22
Campground, RV Park	\$0.01	\$1.51	\$2.13	\$0.32	\$1.43
Auto Repair	\$0.17	\$0.84	\$1.21	\$0.78	\$0.93
Misc. Services	\$1.52	\$1.19	\$0.41	\$1.41	\$0.89
Gambling	\$0.97	\$0.83	\$0.56	\$0.74	\$0.70
Farmers Market	\$0.00	\$0.05	\$0.22	\$0.05	\$0.13
Transportation Fares	\$0.05	\$0.06	\$0.03	\$0.02	\$0.04
<b>Total Average Daily per Group</b>	<b>\$145.86</b>	<b>\$121.59</b>	<b>\$136.80</b>	<b>\$123.42</b>	<b>\$131.85</b>
<b>Total Expenditures</b>	<b>\$351,400,000</b>	<b>\$744,970,000</b>	<b>\$1,548,300,000</b>	<b>\$588,290,000</b>	<b>\$3,232,960,000</b>
<b>% of Total</b>	<b>11%</b>	<b>23%</b>	<b>48%</b>	<b>18%</b>	<b>100%</b>

<sup>1</sup>Data are collected quarterly. Therefore, year total group size, length of stay and avg. daily expenditures are weighted averages of quarterly figures. <sup>2</sup>Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups. <sup>3</sup>Spending data are gathered via on-site surveys of nonresident travelers at airports, gas stations, and rest areas in MT. Travelers report 24 hours worth of trip expenditures.

Revised

## 2005-2015 Montana Nonresident Traveler Expenditure Trends

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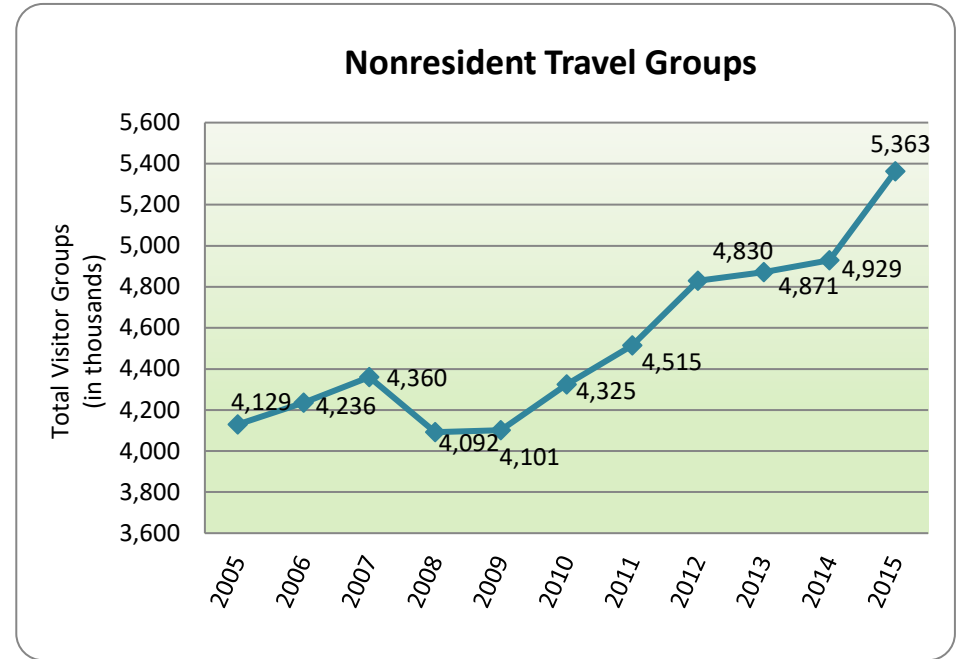
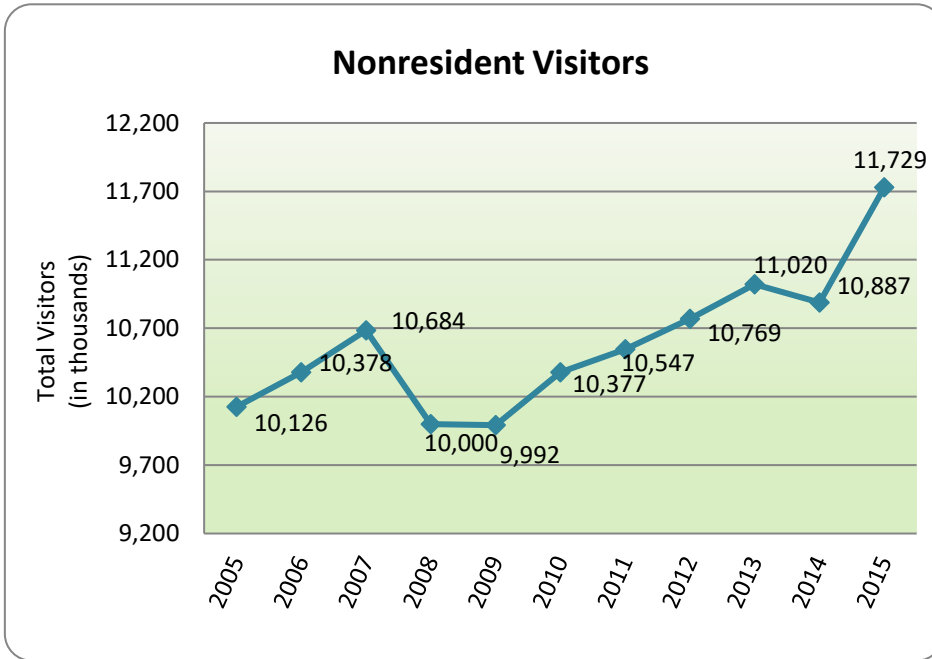
Nonresident Traveler Expenditure Trends	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Total Inflation-adjusted Expenditures (in millions of 2015 dollars <sup>1</sup> )	\$3,343	\$3,426	\$3,527	\$3,003	\$2,510	\$2,660	\$2,923	\$3,375	\$3,687	\$3,905	\$3,233
% Change from Previous Year	N/A <sup>3</sup>	2.5%	2.9%	-14.9%	-16.4%	6.0%	9.9%	15.5%	9.2%	5.9%	-17.2%
Total Actual Expenditures (in millions)	\$2,755	\$2,914	\$3,085	\$2,728	\$2,272	\$2,447	\$2,774	\$3,269	\$3,624	\$3,900	\$3,233
% Change from Previous Year	N/A <sup>3</sup>	5.8%	5.9%	-11.6%	-16.7%	7.7%	13.4%	17.8%	10.9%	7.6%	-17.1%

<sup>1</sup>U.S. Dept. of Labor, Bureau of Labor Statistics. Consumer Price Index - All Urban Consumers (CPI-U). 1982-1984=100.

<sup>2</sup>Data are collected quarterly. Therefore, beginning in 2010, year total expenditure is the weighted average of quarterly expenditures.

<sup>3</sup>Comparison to previous years is not advisable due to changes in model data.

# 2005-2015 Montana Nonresident Traveler Visitation Trends



Nonresident Traveler Visitation Trends	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Nonresident Visitors (in thousands)	10,126	10,378	10,684	10,000	9,992	10,377	10,547	10,769	11,020	10,887	11,729
% Change from Previous Year	3.3%	2.5%	2.9%	-6.4%	-0.1%	3.9%	1.6%	2.1%	2.3%	-1.2%	7.7%
Nonresident Travel Groups (in thousands <sup>1</sup> )	4,129	4,236	4,360	4,092	4,101	4,325	4,515	4,830	4,871	4,929	5,363
% Change from Previous Year	-2.6%	2.6%	2.9%	-6.1%	0.2%	5.5%	4.4%	7.0%	0.8%	1.2%	8.8%
Average people per group	2.45	2.45	2.45	2.45	2.46	2.38	2.31	2.22	2.24	2.19	2.19

<sup>1</sup>Beginning in 2010, group size is a weighted average of quarterly group sizes.

Revised

## 2015 Expenditure Comparison of Overseas, Canadian, and Domestic Nonresident Travelers to Montana

Overseas Visitors <sup>1</sup>				Canadian Visitors				Domestic Visitors			
Sample size	232			1,829			12,017				
Nonresident Travelers	194,000			1,524,000			10,012,000				
Group Size (people/group)	2.37			2.32			2.16				
Length of Stay (nights)	5.66			2.50			4.89				
% of All Travelers in 2015	2%			13%			86%				

Expenditure Category <sup>2,3</sup>	Overseas Visitors <sup>1</sup>			Canadian Visitors			Domestic Visitors		
	Avg. Daily Group Expend. <sup>4</sup>	% of Daily Expend.	Avg. Trip Expend	Avg. Daily Group Expend. <sup>4</sup>	% of Daily Expend.	Avg. Trip Expend	Avg. Daily Group Expend. <sup>4</sup>	% of Daily Expend.	Avg. Trip Expend
Gasoline, Diesel	\$18.66	13%	\$105.66	\$33.93	24%	\$84.67	\$28.99	22%	\$141.67
Restaurant, Bar	\$34.99	23%	\$198.10	\$27.46	20%	\$68.51	\$26.14	20%	\$127.73
Retail Sales	\$19.01	13%	\$107.61	\$29.48	21%	\$73.56	\$14.96	11%	\$73.11
Hotel, B&B, etc.	\$29.41	20%	\$166.53	\$16.85	12%	\$42.04	\$16.21	12%	\$79.23
Outfitter, Guide	\$9.20	6%	\$52.11	\$3.32	2%	\$8.30	\$13.59	10%	\$66.38
Groceries, Snacks	\$19.36	13%	\$109.63	\$16.20	12%	\$40.42	\$11.43	9%	\$55.87
Licenses, Entrance Fees	\$6.68	4%	\$37.85	\$5.31	4%	\$13.25	\$6.19	5%	\$30.25
Auto Rental	\$5.13	3%	\$29.03	\$0.52	<1%	\$1.29	\$3.57	3%	\$17.42
Rental Cabin, Condo	\$2.29	2%	\$12.95	\$1.86	1%	\$4.63	\$2.89	2%	\$14.14
Made in Montana	\$1.43	1%	\$8.10	\$1.33	1%	\$3.31	\$2.41	2%	\$11.80
Campground, RV Park	\$1.61	1%	\$9.09	\$1.62	1%	\$4.05	\$1.40	1%	\$6.86
Auto Repair	\$0.06	<1%	\$0.33	\$0.32	0%	\$0.79	\$1.04	1%	\$5.08
Misc. Services	\$0.93	1%	\$5.27	\$1.24	1%	\$3.10	\$0.84	1%	\$4.13
Gambling	\$0.02	<1%	\$0.09	\$1.03	1%	\$2.56	\$0.66	1%	\$3.24
Farmers Market	\$0.11	<1%	\$0.60	\$0.14	<1%	\$0.34	\$0.13	<1%	\$0.62
Transportation Fares	\$0.04	<1%	\$0.25	\$0.01	<1%	\$0.02	\$0.04	<1%	\$0.19
<b>Total Average Daily per Group</b>	<b>\$148.92</b>		<b>\$843.20</b>	<b>\$140.60</b>		<b>\$350.84</b>	<b>\$130.51</b>		<b>\$637.72</b>
<b>Total 2015 Expenditures</b>	<b>\$76,680,000</b>			<b>\$240,900,000</b>			<b>\$2,915,390,000</b>		
<b>% of Total</b>	<b>2%</b>			<b>7%</b>			<b>91%</b>		

<sup>1</sup>Numerous overseas visitors may pre-pay for many of their trip expenses, which are not reflected here; these figures represent only expenditures made in MT. <sup>2</sup>Data is collected quarterly. Therefore, year total group size, length of stay and avg. daily expenditures are weighted averages of quarterly figures. <sup>3</sup>Spending data are gathered via on-site surveys of nonresident travelers at airports, gas stations, and rest areas in MT. Travelers report 24 hours worth of trip expenditures. <sup>4</sup>Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups.

Revised

## 2015 Montana Airport of Arrival Statewide Nonresident Expenditure Profiles

**Avg. Daily Group Expenditures by Airport of Arrival<sup>1</sup> (Expenditures represent full trip in MT, not spending exclusively in arrival city.)**

	Airport of Arrival in Montana <sup>2,3</sup>						
	All Fliers	Billings	Bozeman	Great Falls	Helena	Kalispell	Missoula
Sample size	1,512	327	462	150	62	206	265
Nonresident Travelers	1,260,000	270,000	390,000	130,000	50,000	170,000	220,000
Group Size (people/group)	1.94	1.56	2.29	1.63	1.41	2.23	1.85
Length of Stay (nights)	6.64	5.35	7.66	5.49	4.64	6.99	7.45
% of All Travelers in 2015	10.7%	2.3%	3.3%	1.1%	0.4%	1.5%	1.9%
Restaurant, Bar	\$45.72	\$40.73	\$54.84	\$39.42	\$44.59	\$43.74	\$41.25
Outfitter, Guide	\$32.93	\$11.55	\$60.70	\$8.72	\$8.52	\$29.08	\$34.98
Auto Rental	\$24.55	\$23.41	\$29.33	\$17.28	\$21.57	\$25.21	\$21.62
Hotel, B&B, etc.	\$21.95	\$24.56	\$25.83	\$16.91	\$26.46	\$18.34	\$15.96
Retail Sales	\$18.68	\$11.73	\$24.11	\$14.55	\$20.59	\$28.57	\$13.28
Licenses, Entrance Fees	\$18.62	\$5.10	\$41.86	\$9.06	\$9.74	\$15.60	\$4.62
Groceries, Snacks	\$13.41	\$7.45	\$18.77	\$11.05	\$8.61	\$15.28	\$13.24
Gasoline, Diesel	\$10.56	\$12.23	\$11.57	\$11.03	\$5.16	\$7.96	\$9.17
Rental Cabin, Condo	\$4.82	\$1.34	\$5.19	\$1.17	\$1.11	\$11.24	\$6.97
Made in Montana	\$4.18	\$3.14	\$6.33	\$2.85	\$3.07	\$3.14	\$3.78
Misc. Services	\$1.97	\$1.33	\$3.28	\$1.02	\$0.65	\$1.55	\$1.91
Gambling	\$1.42	\$2.22	\$0.91	\$2.95	\$1.59	\$0.19	\$1.18
Auto Repair	\$0.30	\$0.59	\$0.00	\$0.47	\$0.00	\$0.11	\$0.62
Transportation Fares	\$0.25	\$0.42	\$0.23	\$0.19	\$0.11	\$0.28	\$0.15
Farmers Market	\$0.19	\$0.10	\$0.17	\$0.13	\$0.19	\$0.25	\$0.33
Campground, RV Park	\$0.11	\$0.04	\$0.02	\$0.12	\$0.07	\$0.37	\$0.17
<b>Total Avg. Daily per Group</b>	<b>\$199.66</b>	<b>\$145.96</b>	<b>\$283.13</b>	<b>\$136.90</b>	<b>\$152.02</b>	<b>\$200.92</b>	<b>\$169.24</b>
<b>Estimate of Statewide Spending</b>	<b>\$764,550,000</b>	<b>\$95,210,000</b>	<b>\$373,580,000</b>	<b>\$42,050,000</b>	<b>\$16,260,000</b>	<b>\$107,980,000</b>	<b>\$124,390,000</b>

<sup>1</sup>Spending data are gathered via on-site surveys of nonresident travelers at airports, gas stations, and rest areas in MT. Travelers report 24 hours worth of trip expenditures. <sup>2</sup>Spending data presented here are representative of expenditures in MT by traveler groups who flew into one of the listed airports. <sup>3</sup>Butte and West Yellowstone airports had insufficient sample sizes for inclusion in this analysis.