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### 2017 Nonresident Visitation, Expenditures & Economic Impact Estimates

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# 2017 Nonresident Visitation, Expenditures & Economic Impact Estimates

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

Kara Grau, M.S.

3/20/2018

A collection of 2017 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.

## Visitation, Expenditures & Economic Impact Estimates

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# 2017 Nonresident Visitation, Expenditures & Economic Impact Estimates

2018

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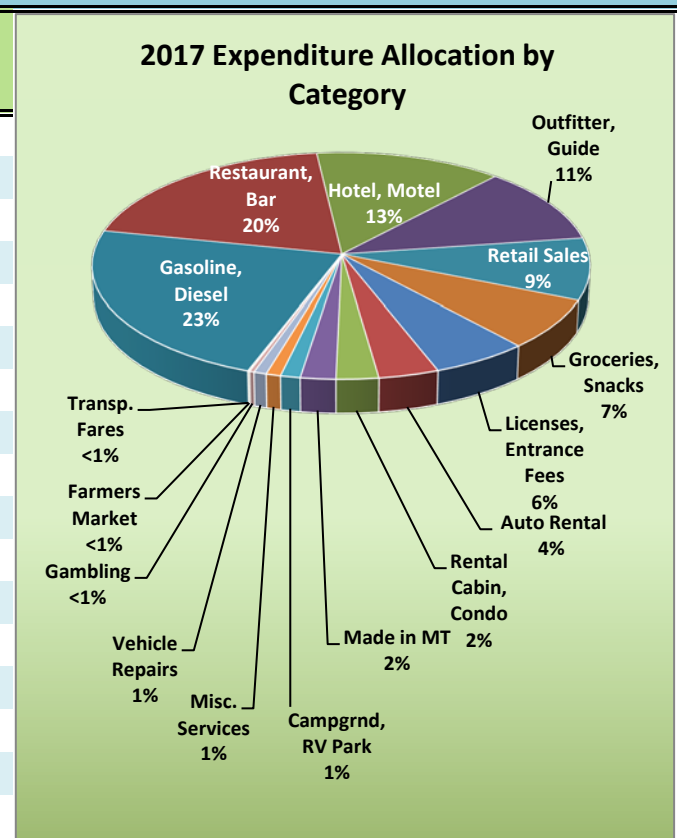
# 2017 Montana Nonresident Traveler Expenditures

### 2017 Contribution of Nonresident Traveler Expenditures to Montana's Economy

- In 2017, nonresident visitors to Montana spent an estimated \$3.36 billion in the state. (See Table 1, below)
- This \$3.36 billion in local spending directly supports \$2.81 billion of economic activity in the state, and supports an additional \$1.89 billion of economic activity, indirectly. (see Table 2, below)
- The estimated total contribution of nonresident spending to Montana's economy was \$4.7 billion in 2017.

**Table 1 - 2017 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	\$29.12	23%	\$768,690,000
Restaurant, Bar	\$25.38	20%	\$666,870,000
Hotel, Motel	\$17.03	13%	\$448,870,000
Outfitter, Guide	\$14.29	11%	\$373,780,000
Retail Sales	\$11.27	9%	\$295,820,000
Groceries, Snacks	\$9.08	7%	\$239,310,000
Licenses, Entrance Fees	\$7.50	6%	\$192,960,000
Auto Rental	\$4.57	4%	\$119,230,000
Rental Cabin, Condo	\$3.19	2%	\$83,680,000
Made in MT	\$2.66	2%	\$69,650,000
Campground, RV Park	\$1.48	1%	\$39,010,000
Misc. Services	\$1.12	1%	\$28,910,000
Vehicle Repairs	\$0.93	1%	\$24,950,000
Gambling	\$0.35	<1%	\$9,200,000
Farmers Market	\$0.14	<1%	\$3,570,000
Transportation Fares	\$0.01	<1%	\$280,000
<b>Estimated Total</b>	<b>\$128.12</b>		<b>\$3,364,780,000</b>



<sup>1</sup>Spending data are gathered from nonresident travelers intercepted 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 - 2017 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$2,814,010,000	\$911,760,000	\$978,610,000	\$4,704,380,000
Employment (# of jobs)	38,890	6,380	8,110	53,380
Employee Compensation	\$885,690,000	\$201,720,000	\$260,910,000	\$1,348,320,000
Proprietor Income	\$119,660,000	\$53,110,000	\$42,450,000	\$215,220,000
Other Property Type Income	\$368,730,000	\$170,080,000	\$178,630,000	\$717,440,000
State & Local Taxes				\$204,510,000

**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.

## 2017 Montana Nonresident Traveler Quarterly Travel Comparison

	Quarter 1 (Jan-Mar)	Quarter 2 (Apr-Jun)	Quarter 3 (Jul-Sep)	Quarter 4 (Oct-Dec)	Year Total <sup>1</sup> 2017
<b>Visitation &amp; Length of Stay</b>					
Nonresident Visitors	1,474,000	3,425,000	5,802,000	1,774,000	12,475,000
% of Total	12%	27%	47%	14%	100%
Nonresident Travel Groups	712,000	1,556,000	2,397,000	906,000	5,571,000
% of Total	13%	28%	43%	16%	100%
Group Size (people per group)	2.07	2.18	2.42	1.96	2.23
Length of Stay (nights)	3.90	4.02	5.58	4.35	4.73
<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	\$25.69	\$29.35	\$28.03	\$35.21	\$29.12
Restaurant, Bar	\$28.69	\$24.06	\$26.57	\$20.62	\$25.38
Hotel, B&B, etc.	\$22.55	\$19.09	\$15.80	\$14.07	\$17.03
Outfitter, Guide	\$6.15	\$8.23	\$19.07	\$12.71	\$14.29
Retail Sales	\$8.63	\$8.50	\$11.85	\$15.26	\$11.27
Groceries, Snacks	\$7.77	\$9.01	\$9.94	\$7.19	\$9.08
Licenses, Entrance Fees	\$23.18	\$4.75	\$3.93	\$11.74	\$7.50
Auto Rental	\$6.85	\$3.59	\$4.30	\$5.13	\$4.57
Rental Cabin, Condo	\$3.27	\$2.83	\$3.54	\$2.42	\$3.19
Made in MT	\$2.54	\$2.19	\$3.32	\$1.14	\$2.66
Campground, RV Park	\$0.12	\$1.12	\$2.30	\$0.23	\$1.48
Misc. Services	\$3.47	\$1.07	\$0.62	\$1.09	\$1.12
Auto Repair	\$0.48	\$1.45	\$0.93	\$0.52	\$0.93
Gambling	\$0.71	\$0.30	\$0.33	\$0.24	\$0.35
Farmers Market	\$0.00	\$0.10	\$0.21	\$0.02	\$0.14
Transportation Fares	\$0.08	\$0.00	\$0.00	\$0.00	\$0.01
	<b>\$139.70</b>	<b>\$115.64</b>	<b>\$130.75</b>	<b>\$127.59</b>	<b>\$128.12</b>
<b>Total Expenditures</b>	<b>\$389,430,000</b>	<b>\$723,160,000</b>	<b>\$1,749,080,000</b>	<b>\$503,110,000</b>	<b>\$3,364,780,000</b>
% of Total	12%	21%	52%	15%	100%

<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 from nonresident travelers intercepted at airports, gas stations, and rest areas in MT. Travelers report 24 hours worth of trip expenditures.

Montana Nonresident Traveler Expenditure Profiles

Average 2017 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	11,134	4,007	2,027	3,242	1,320	223	307
Nonresident Travelers	12,475,000	4,493,000	2,273,000	3,635,000	1,480,000	250,000	344,000
Group Size (people/group)	2.23	2.57	2.16	2.13	1.59	2.13	1.96
Length of Stay (nights)	4.73	6.17	6.32	1.03	7.05	0.76	6.80
% of All Travelers in 2017	100%	36%	18%	29%	12%	2%	3%
Gasoline, Diesel	\$29.12	\$23.31	\$18.45	\$46.67	\$23.96	\$33.68	\$25.01
Restaurant, Bar	\$25.38	\$32.84	\$28.45	\$13.48	\$30.41	\$13.38	\$16.80
Hotel, B&B, etc.	\$17.03	\$20.25	\$10.93	\$13.81	\$25.99	\$4.91	\$9.60
Outfitter, Guide	\$14.29	\$32.05	\$8.94	\$0.14	\$3.63	\$0.00	\$4.28
Retail Sales	\$11.27	\$12.61	\$16.64	\$3.37	\$10.27	\$49.08	\$16.65
Groceries, Snacks	\$9.08	\$11.80	\$11.17	\$4.26	\$7.04	\$20.19	\$11.40
Licenses, Entrance Fees	\$7.50	\$18.94	\$4.00	\$0.71	\$6.51	\$3.58	\$3.47
Auto Rental	\$4.57	\$5.86	\$4.26	\$0.06	\$13.16	\$0.03	\$2.12
Rental Cabin, Condo	\$3.19	\$6.55	\$2.14	\$0.21	\$2.32	\$0.55	\$1.92
Made in MT	\$2.66	\$2.99	\$2.82	\$1.66	\$2.25	\$12.56	\$1.79
Campground, RV Park	\$1.48	\$2.49	\$0.89	\$0.85	\$0.23	\$0.37	\$0.11
Misc. Services	\$1.12	\$1.79	\$1.03	\$0.24	\$1.29	\$1.74	\$4.19
Auto Repair	\$0.93	\$0.78	\$0.72	\$0.60	\$2.09	\$3.94	\$1.05
Gambling	\$0.35	\$0.20	\$0.61	\$0.41	\$0.25	\$0.26	\$0.35
Farmers Market	\$0.14	\$0.19	\$0.19	\$0.03	\$0.09	\$0.00	\$0.08
Transportation Fares	\$0.01	\$0.03	\$0.00	\$0.00	\$0.02	\$0.00	\$0.03
<b>Total Avg. Daily per Group</b>	<b>\$128.12</b>	<b>\$172.69</b>	<b>\$111.23</b>	<b>\$86.51</b>	<b>\$129.51</b>	<b>\$144.27</b>	<b>\$98.85</b>

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

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=9,182)	Mean <sup>2</sup> of Those Who Spent	Median <sup>3</sup> of Those Who Spent
Gasoline, Diesel	5735	62%	\$46.52	\$39.00
Restaurant, Bar	4672	51%	\$49.68	\$36.00
Hotel, B&B, etc.	3133	34%	\$124.71	\$110.00
Groceries, Snacks	2392	26%	\$34.24	\$20.00
Licenses, Entrance Fees	1432	16%	\$53.33	\$14.00
Made in MT	1304	14%	\$17.81	\$6.67
Retail Sales	1112	12%	\$88.05	\$50.00
Campground, RV Park	911	10%	\$37.84	\$35.31
Auto Rental	716	8%	\$58.78	\$55.00
Rental Cabin, Condo	380	4%	\$187.13	\$177.00
Outfitter, Guide	349	4%	\$330.34	\$276.65
Farmers Market	272	3%	\$3.89	\$2.86
Misc. Services	164	2%	\$72.08	\$47.00
Gambling	121	1%	\$27.75	\$23.42
Auto Repair	82	1%	\$109.83	\$102.92
Transportation Fares	19	<1%	\$7.52	\$8.00

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 from nonresident travelers intercepted 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.

# Quarter 1, 2017

## 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	1,765	433	354	509	346	44	78
Nonresident Travelers	1,474,000	363,000	296,000	425,000	289,000	37,000	65,000
Group Size (people/group)	2.07	2.82	1.94	2.05	1.37	1.92	1.89
Length of Stay (nights)	3.90	5.19	6.48	0.74	4.62	0.80	4.21
% of All Travelers in Q1	100%	25%	20%	29%	20%	3%	4%
Restaurant, Bar	\$28.69	\$51.67	\$22.80	\$12.04	\$34.81	\$21.63	\$14.69
Gasoline, Diesel	\$25.69	\$15.07	\$15.08	\$43.98	\$22.23	\$33.16	\$21.94
Licenses, Entrance Fees	\$23.18	\$81.33	\$10.13	\$0.00	\$7.68	\$2.20	\$1.74
Hotel, B&B, etc.	\$22.55	\$25.70	\$9.45	\$18.03	\$40.77	\$10.62	\$13.64
Retail Sales	\$8.63	\$14.89	\$8.71	\$1.56	\$7.49	\$25.80	\$15.04
Groceries, Snacks	\$7.77	\$12.57	\$10.74	\$3.11	\$5.16	\$18.44	\$4.97
Auto Rental	\$6.85	\$9.33	\$3.45	\$0.24	\$18.20	\$0.00	\$1.77
Outfitter, Guide	\$6.15	\$21.50	\$2.85	\$0.00	\$2.42	\$0.00	\$0.00
Misc. Services	\$3.47	\$10.39	\$0.88	\$0.08	\$3.07	\$0.63	\$3.50
Rental Cabin, Condo	\$3.27	\$9.80	\$2.67	\$0.25	\$1.55	\$1.16	\$0.11
Made in MT	\$2.54	\$3.40	\$2.90	\$0.23	\$1.90	\$22.13	\$1.53
Gambling	\$0.71	\$0.29	\$0.78	\$1.41	\$0.36	\$0.32	\$0.00
Auto Repair	\$0.48	\$0.44	\$0.47	\$0.43	\$0.77	\$0.00	\$0.00
Campground, RV Park	\$0.12	\$0.26	\$0.05	\$0.17	\$0.00	\$0.00	\$0.05
Transportation Fares	\$0.08	\$0.22	\$0.00	\$0.00	\$0.12	\$0.03	\$0.00
Farmers Market	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Total Avg. Daily per Group</b>	<b>\$140.18</b>	<b>\$256.86</b>	<b>\$90.96</b>	<b>\$81.53</b>	<b>\$146.53</b>	<b>\$136.12</b>	<b>\$78.98</b>

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

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=1,464)	Mean <sup>2</sup> of Those Who Spent	Median <sup>3</sup> of Those Who Spent
Gasoline, Diesel	812	55%	\$46.32	\$40.00
Restaurant, Bar	735	50%	\$57.16	\$39.66
Hotel, B&B, etc.	549	38%	\$104.62	\$100.00
Groceries, Snacks	374	26%	\$30.40	\$20.00
Licenses, Entrance Fees	204	14%	\$179.06	\$81.10
Auto Rental	177	12%	\$56.66	\$50.00
Made in MT	171	12%	\$73.34	\$30.00
Retail Sales	148	10%	\$85.57	\$50.00
Rental Cabin, Condo	54	4%	\$154.20	\$147.96
Misc. Services	40	3%	\$126.66	\$77.38
Outfitter, Guide	35	2%	\$259.48	\$294.64
Gambling	19	1%	\$55.80	\$40.00
Campground, RV Park	11	1%	\$29.37	\$36.75
Transportation Fares	10	1%	\$11.00	\$11.53
Auto Repair	8	1%	\$82.92	\$30.00
Farmers Market	1	<1%	\$0.00	\$0.00

<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 from nonresident travelers intercepted 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 2, 2017

## Montana Nonresident Traveler Expenditure Profiles

### 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	3,737	1,254	654	1,222	443	58	101
Nonresident Travelers	3,424,000	1,151,000	600,000	1,122,000	406,000	53,000	92,000
Group Size (people/group)	2.18	2.57	2.07	2.10	1.59	1.86	1.91
Length of Stay (nights)	4.02	5.06	6.27	0.90	6.25	0.71	6.62
% of All Travelers in Q2	100%	34%	18%	33%	12%	2%	3%
Gasoline, Diesel	\$29.35	\$24.54	\$16.61	\$43.21	\$23.56	\$39.44	\$22.39
Restaurant, Bar	\$24.06	\$31.08	\$27.92	\$10.82	\$36.49	\$14.38	\$19.80
Hotel, B&B, etc.	\$19.09	\$25.65	\$12.62	\$13.33	\$27.85	\$8.49	\$11.19
Groceries, Snacks	\$9.01	\$12.16	\$11.21	\$4.18	\$6.69	\$29.78	\$10.30
Retail Sales	\$8.50	\$9.91	\$11.34	\$3.83	\$9.30	\$19.72	\$20.21
Outfitter, Guide	\$8.23	\$20.52	\$2.24	\$0.12	\$5.61	\$0.00	\$2.24
Licenses, Entrance Fees	\$4.75	\$10.07	\$3.60	\$0.44	\$3.19	\$1.17	\$4.74
Auto Rental	\$3.59	\$4.54	\$3.47	\$0.05	\$11.14	\$0.00	\$3.21
Rental Cabin, Condo	\$2.83	\$6.48	\$1.60	\$0.12	\$1.74	\$0.00	\$3.15
Made in MT	\$2.19	\$2.74	\$2.35	\$0.83	\$1.55	\$19.21	\$2.24
Auto Repair	\$1.45	\$1.90	\$0.40	\$1.37	\$2.27	\$0.00	\$0.39
Campground, RV Park	\$1.12	\$2.16	\$0.37	\$0.88	\$0.12	\$0.20	\$0.29
Misc. Services	\$1.07	\$0.58	\$1.96	\$0.42	\$2.22	\$0.07	\$5.81
Gambling	\$0.30	\$0.24	\$0.50	\$0.26	\$0.16	\$0.86	\$0.51
Farmers Market	\$0.10	\$0.12	\$0.17	\$0.02	\$0.17	\$0.00	\$0.08
Transportation Fares	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.06
<b>Total Avg. Daily per Group</b>	<b>\$115.64</b>	<b>\$152.69</b>	<b>\$96.36</b>	<b>\$79.88</b>	<b>\$132.06</b>	<b>\$133.32</b>	<b>\$106.61</b>

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

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=3,024)	Mean <sup>2</sup> of Those Who Spent	Median <sup>3</sup> of Those Who Spent
Gasoline, Diesel	1987	66%	\$44.66	\$36.88
Restaurant, Bar	1525	50%	\$47.69	\$35.00
Hotel, B&B, etc.	1067	35%	\$122.01	\$110.00
Groceries, Snacks	800	26%	\$34.05	\$20.00
Licenses, Entrance Fees	424	14%	\$33.86	\$15.00
Made in MT	357	12%	\$18.56	\$7.62
Retail Sales	356	12%	\$71.90	\$50.00
Campground, RV Park	280	9%	\$30.21	\$37.00
Auto Rental	209	7%	\$51.87	\$50.00
Rental Cabin, Condo	116	4%	\$166.39	\$175.00
Outfitter, Guide	95	3%	\$261.51	\$200.00
Farmers Market	53	2%	\$5.61	\$4.00
Misc. Services	48	2%	\$68.16	\$42.29
Gambling	43	1%	\$20.97	\$32.99
Auto Repair	28	1%	\$154.82	\$150.00
Transportation Fares	4	<1%	\$3.08	\$3.08

<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 from nonresident travelers intercepted 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 3, 2017

## 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	4,079	1,985	676	967	317	69	63
Nonresident Travelers	5,802,000	2,826,000	963,000	1,375,000	453,000	99,000	87,000
Group Size (people/group)	2.42	2.59	2.43	2.26	1.77	2.76	2.20
Length of Stay (nights)	5.58	6.67	6.82	1.25	9.49	0.98	9.66
% of All Travelers in Q3	100%	49%	17%	24%	8%	2%	2%
Gasoline, Diesel	\$28.03	\$22.59	\$18.98	\$48.13	\$23.99	\$28.50	\$26.92
Restaurant, Bar	\$26.57	\$31.04	\$30.67	\$15.89	\$26.04	\$12.18	\$13.32
Outfitter, Guide	\$19.07	\$31.82	\$15.62	\$0.22	\$4.46	\$0.00	\$10.05
Hotel, B&B, etc.	\$15.80	\$18.52	\$10.84	\$13.77	\$19.72	\$1.28	\$7.43
Retail Sales	\$11.85	\$11.70	\$19.79	\$2.55	\$9.84	\$63.26	\$18.15
Groceries, Snacks	\$9.94	\$11.06	\$12.00	\$4.93	\$9.59	\$19.83	\$15.74
Auto Rental	\$4.30	\$5.32	\$4.46	\$0.00	\$11.57	\$0.06	\$0.97
Licenses, Entrance Fees	\$3.93	\$5.43	\$2.64	\$1.14	\$5.27	\$5.43	\$1.98
Rental Cabin, Condo	\$3.54	\$5.55	\$2.55	\$0.27	\$3.64	\$0.73	\$0.00
Made in MT	\$3.32	\$3.34	\$3.38	\$2.93	\$3.01	\$10.47	\$1.35
Campground, RV Park	\$2.30	\$3.46	\$1.59	\$1.18	\$0.49	\$0.64	\$0.06
Auto Repair	\$0.93	\$0.60	\$1.13	\$0.26	\$3.52	\$6.76	\$0.00
Misc. Services	\$0.62	\$0.83	\$0.60	\$0.23	\$0.26	\$1.53	\$0.34
Gambling	\$0.33	\$0.20	\$0.70	\$0.38	\$0.23	\$0.00	\$0.54
Farmers Market	\$0.21	\$0.29	\$0.29	\$0.05	\$0.10	\$0.00	\$0.11
Transportation Fares	\$0.00	\$0.01	\$0.00	\$0.00	\$0.01	\$0.00	\$0.00
<b>Total Avg. Daily per Group</b>	<b>\$130.75</b>	<b>\$151.76</b>	<b>\$125.24</b>	<b>\$91.93</b>	<b>\$121.74</b>	<b>\$150.67</b>	<b>\$96.96</b>

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

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=3,455)	Mean <sup>2</sup> of Those Who Spent	Median <sup>3</sup> of Those Who Spent
Gasoline, Diesel	2103	61%	\$46.06	\$39.00
Restaurant, Bar	1827	53%	\$50.26	\$40.00
Hotel, B&B, etc.	1115	32%	\$145.52	\$130.00
Groceries, Snacks	973	28%	\$35.33	\$20.00
Licenses, Entrance Fees	648	19%	\$20.94	\$8.00
Made in MT	645	19%	\$17.78	\$6.25
Campground, RV Park	596	17%	\$41.83	\$36.00
Retail Sales	474	14%	\$86.04	\$50.00
Auto Rental	222	6%	\$66.84	\$60.00
Farmers Market	203	6%	\$3.65	\$2.86
Outfitter, Guide	199	6%	\$328.90	\$238.92
Rental Cabin, Condo	163	5%	\$222.82	\$200.00
Misc. Services	51	1%	\$42.21	\$29.79
Gambling	42	1%	\$26.78	\$25.38
Auto Repair	37	1%	\$86.26	\$102.92
Transportation Fares	4	<1%	\$4.03	\$4.03

<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 from nonresident travelers intercepted 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 4, 2017

## Montana Nonresident Traveler Expenditure Profiles

### 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	1,553	335	343	544	214	52	65
Nonresident Travelers	1,774,000	383,000	392,000	621,000	245,000	59,000	74,000
Group Size (people/group)	1.96	2.27	1.91	1.98	1.59	1.60	1.86
Length of Stay (nights)	4.35	7.08	5.28	1.02	7.30	0.46	6.41
% of All Travelers in Q4	100%	22%	22%	35%	14%	3%	4%
Gasoline, Diesel	\$35.21	\$31.13	\$22.33	\$49.07	\$25.93	\$44.48	\$26.85
Restaurant, Bar	\$20.62	\$28.14	\$26.17	\$11.58	\$27.19	\$7.80	\$19.16
Retail Sales	\$15.26	\$18.46	\$20.71	\$5.77	\$14.88	\$61.42	\$10.44
Hotel, B&B, etc.	\$14.07	\$15.78	\$9.69	\$12.63	\$23.79	\$6.86	\$9.05
Outfitter, Guide	\$12.71	\$57.48	\$1.55	\$0.00	\$0.17	\$0.00	\$0.00
Licenses, Entrance Fees	\$11.74	\$39.57	\$4.43	\$0.29	\$12.74	\$1.73	\$4.86
Groceries, Snacks	\$7.19	\$13.80	\$8.57	\$3.12	\$3.87	\$11.33	\$9.07
Auto Rental	\$5.13	\$7.27	\$5.51	\$0.13	\$14.98	\$0.00	\$2.62
Rental Cabin, Condo	\$2.42	\$8.34	\$1.17	\$0.18	\$1.06	\$0.00	\$4.07
Made in MT	\$1.14	\$1.56	\$1.56	\$0.13	\$1.95	\$1.63	\$2.01
Misc. Services	\$1.09	\$0.77	\$1.11	\$0.08	\$0.62	\$5.62	\$8.28
Auto Repair	\$0.52	\$0.22	\$0.00	\$0.50	\$0.00	\$3.35	\$3.96
Gambling	\$0.24	\$0.10	\$0.34	\$0.26	\$0.34	\$0.30	\$0.00
Campground, RV Park	\$0.23	\$0.60	\$0.00	\$0.25	\$0.02	\$0.08	\$0.00
Farmers Market	\$0.02	\$0.02	\$0.03	\$0.00	\$0.02	\$0.00	\$0.07
Transportation Fares	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.03
<b>Total Avg. Daily per Group</b>	<b>\$127.59</b>	<b>\$223.24</b>	<b>\$103.17</b>	<b>\$83.99</b>	<b>\$127.56</b>	<b>\$144.60</b>	<b>\$100.47</b>

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

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=1,239)	Mean <sup>2</sup> of Those Who Spent	Median <sup>3</sup> of Those Who Spent
Gasoline, Diesel	833	67%	\$52.34	\$42.00
Restaurant, Bar	585	47%	\$43.66	\$30.00
Hotel, B&B, etc.	402	32%	\$101.54	\$100.00
Groceries, Snacks	245	20%	\$36.37	\$20.00
Licenses, Entrance Fees	157	13%	\$92.68	\$33.67
Retail Sales	134	11%	\$140.76	\$75.00
Made in MT	131	11%	\$10.79	\$6.67
Auto Rental	108	9%	\$59.07	\$55.00
Rental Cabin, Condo	46	4%	\$151.54	\$111.77
Misc. Services	25	2%	\$52.88	\$46.57
Campground, RV Park	24	2%	\$31.41	\$30.00
Outfitter, Guide	20	2%	\$806.09	\$1,000.00
Gambling	18	1%	\$17.04	\$20.32
Farmers Market	15	1%	\$1.42	\$1.44
Auto Repair	7	1%	\$87.22	\$90.35
Transportation Fares	1	<1%	\$0.00	\$0.00

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

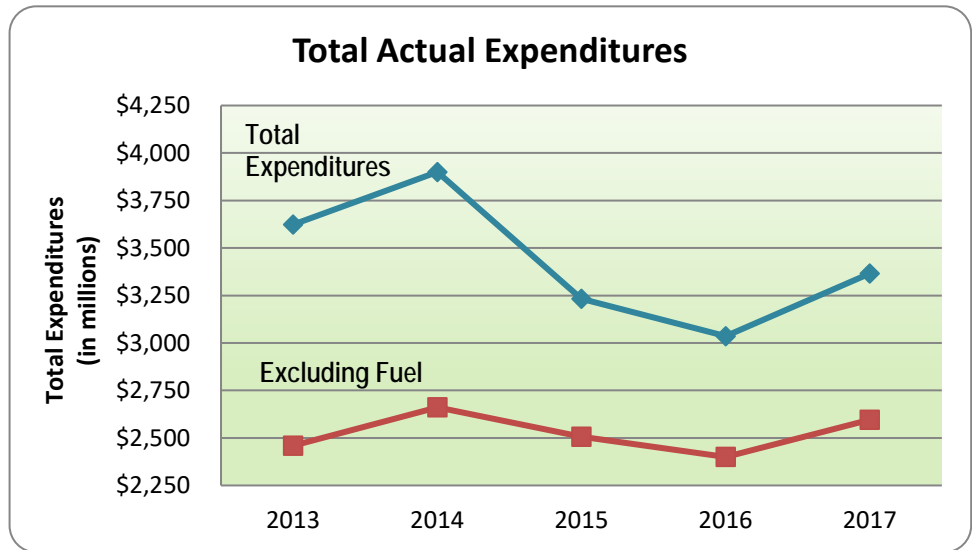
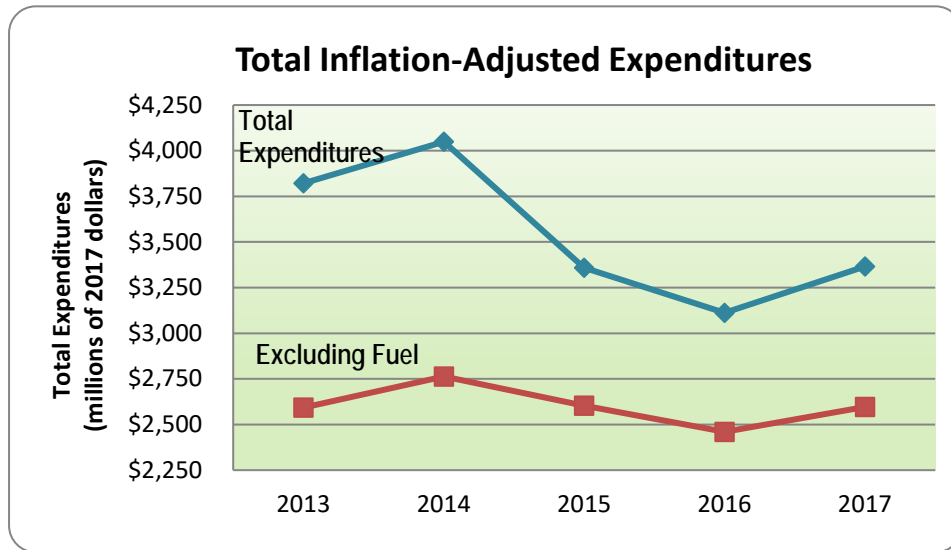
<sup>^^</sup> These figures represent the number and percent of visitor groups who actually spent money in each category. The dollar values are reflective of the actual average amount spent per category.

Spending data are gathered from nonresident travelers intercepted 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.

# 2013-2017 Montana Nonresident Traveler Expenditure Trends

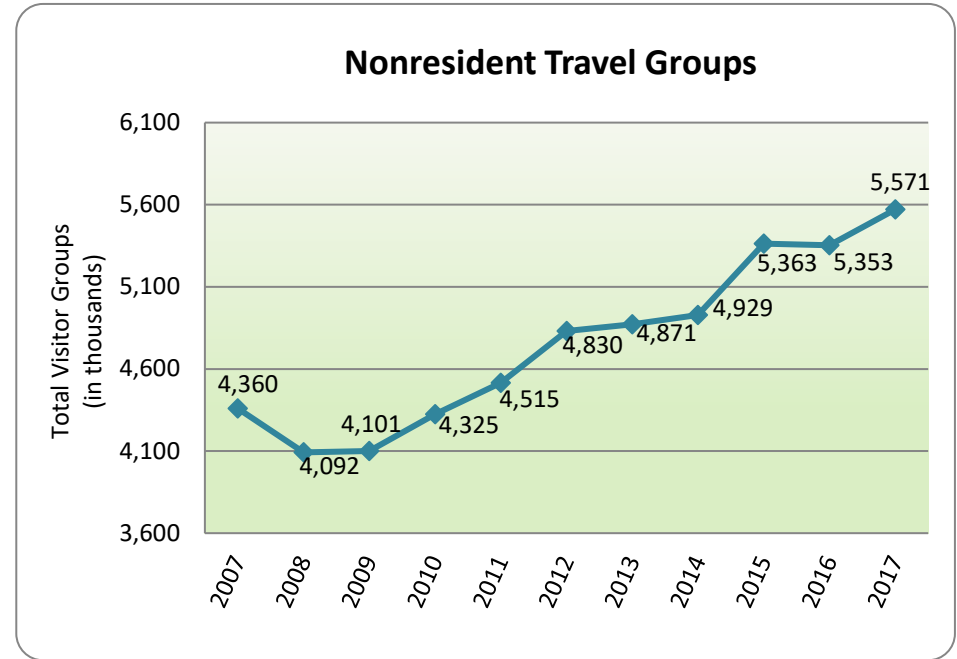
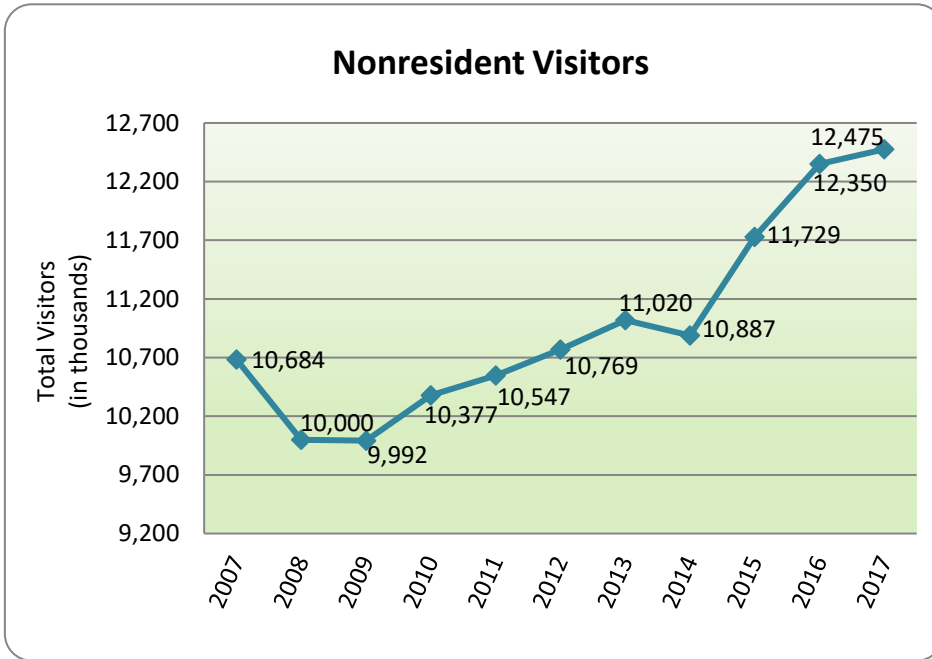
## Overall Total & Excluding Fuel\*



Nonresident Traveler Expenditure Trends	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
<b>Total Inflation-adjusted Expenditures</b> (millions of 2017 dollars <sup>1</sup> )	\$3,701	\$3,138	\$2,613	\$2,742	\$3,059	\$3,502	\$3,822	\$4,049	\$3,359	\$3,112	\$3,365
% Change from Previous Year	3.7%	-15.2%	-16.7%	4.9%	11.6%	14.5%	9.1%	5.9%	-17.0%	-7.4%	8.1%
<u>Excluding Fuel Expenditures</u> (2017\$)	\$2,662	\$2,263	\$1,795	\$1,850	\$2,015	\$2,267	\$2,593	\$2,763	\$2,604	\$2,460	\$2,596
% Change from Previous Year		-15.0%	-20.7%	3.1%	8.9%	12.5%	14.4%	6.6%	-5.8%	-5.5%	5.5%
<b>Total Actual Expenditures</b> (in millions)	\$3,085	\$2,728	\$2,272	\$2,447	\$2,774	\$3,269	\$3,624	\$3,900	\$3,233	\$3,036	\$3,365
% Change from Previous Year	5.9%	-11.6%	-16.7%	7.7%	13.4%	17.8%	10.9%	7.6%	-17.1%	-6.1%	10.8%
<u>Excluding Fuel Expenditures</u>	\$2,219	\$1,967	\$1,561	\$1,651	\$1,827	\$2,116	\$2,459	\$2,661	\$2,506	\$2,400	\$2,596
% Change from Previous Year	5.9%	-11.4%	-20.6%	5.8%	10.7%	15.8%	16.2%	8.2%	-5.8%	-4.2%	8.2%

\*Fuel is generally the largest portion of nonresident travelers' spending, making total traveler expenditure figures susceptible to fluctuations in gas prices. Removing fuel expenditures from the total allows for the trend to be viewed without this external factor's effect. <sup>1</sup>U.S. Bureau of Labor Statistics. Consumer Price Index - All Urban Consumers.

# 2007-2017 Montana Nonresident Traveler Visitation Trends



Nonresident Traveler Visitation Trends	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Nonresident Visitors (in thousands)	10,684	10,000	9,992	10,377	10,547	10,769	11,020	10,887	11,729	12,350	12,475
% Change from Previous Year	2.9%	-6.4%	-0.1%	3.9%	1.6%	2.1%	2.3%	-1.2%	7.7%	5.3%	1.0%
Nonresident Travel Groups (in thousands <sup>1</sup> )	4,360	4,092	4,101	4,325	4,515	4,830	4,871	4,929	5,363	5,353	5,571
% Change from Previous Year	2.9%	-6.1%	0.2%	5.5%	4.4%	7.0%	0.8%	1.2%	8.8%	-0.2%	4.1%
Average people per group	2.45	2.45	2.46	2.38	2.31	2.22	2.24	2.19	2.19	2.31	2.23

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

# 2017 Expenditure Comparison of Overseas, Canadian, and Domestic Nonresident Travelers to Montana

Overseas Visitors <sup>1</sup>				Canadian Visitors				Domestic Visitors			
Sample size	260			1,225			9,638				
Nonresident Travelers	299,000			1,372,000			10,803,000				
Group Size (people/group)	2.55			2.23			2.22				
Length of Stay (nights)	5.82			2.32			5.00				
% of All Travelers in 2017	1%			11%			87%				

Expenditure Category <sup>2,3</sup>	Overseas Visitors			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	\$19.09	11%	\$111.03	\$34.82	27%	\$80.66	\$28.65	23%	\$143.26
Restaurant, Bar	\$39.79	23%	\$231.43	\$24.77	19%	\$57.38	\$25.20	20%	\$125.99
Hotel, B&B, etc.	\$24.71	14%	\$143.70	\$14.28	11%	\$33.08	\$17.07	13%	\$85.35
Outfitter, Guide	\$23.31	13%	\$135.60	\$4.78	4%	\$11.07	\$15.12	12%	\$75.58
Retail Sales	\$17.77	10%	\$103.36	\$19.56	15%	\$45.31	\$10.02	8%	\$50.09
Groceries, Snacks	\$9.14	5%	\$53.18	\$13.58	11%	\$31.46	\$8.58	7%	\$42.91
Licenses, Entrance Fees	\$26.23	15%	\$152.58	\$6.50	5%	\$15.06	\$7.37	6%	\$36.83
Auto Rental	\$4.51	3%	\$26.23	\$0.50	<1%	\$1.15	\$5.07	4%	\$25.34
Rental Cabin, Condo	\$3.86	2%	\$22.44	\$2.04	2%	\$4.74	\$3.31	3%	\$16.54
Made in Montana	\$4.46	3%	\$25.95	\$2.46	2%	\$5.69	\$2.64	2%	\$13.22
Campground, RV Park	\$1.01	1%	\$5.89	\$1.50	1%	\$3.47	\$1.47	1%	\$7.37
Misc. Services	\$0.03	<1%	\$0.17	\$1.88	1%	\$4.36	\$1.06	1%	\$5.29
Auto Repair	\$0.00	<1%	\$0.00	\$0.46	<1%	\$1.07	\$1.02	1%	\$5.09
Gambling	\$0.01	<1%	\$0.06	\$0.54	<1%	\$1.25	\$0.34	<1%	\$1.71
Farmers Market	\$0.24	<1%	\$1.38	\$0.12	<1%	\$0.29	\$0.14	<1%	\$0.68
Transportation Fares	\$0.38	<1%	\$2.19	\$0.03	<1%	\$0.07	\$0.00	<1%	\$0.02
<b>Total Average Daily per Group</b>	<b>\$174.53</b>		<b>\$1,015.19</b>	<b>\$127.83</b>		<b>\$296.11</b>	<b>\$127.07</b>		<b>\$635.27</b>
<b>Total 2017 Expenditures</b>	<b>\$128,850,000</b>			<b>\$177,070,000</b>			<b>\$3,058,850,000</b>		
<b>% of Total</b>	<b>4%</b>			<b>5%</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 from nonresident travelers intercepted 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.

# 2017 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	1,310	n=251	n=469	n=113	n=54	n=164	n=237
Nonresident Travelers	1,472,000	280,000	530,000	130,000	60,000	180,000	270,000
Group Size (people/group)	2.13	1.72	2.43	1.77	1.67	2.44	2.04
Length of Stay (nights)	6.92	6.48	7.10	6.01	5.52	7.62	6.73
% of All Travelers in 2017	11.8%	2.3%	4.2%	1.0%	0.5%	1.5%	2.1%
Restaurant, Bar	\$45.93	\$33.66	\$53.52	\$42.39	\$50.48	\$55.19	\$40.04
Outfitter, Guide	\$41.12	\$21.65	\$56.76	\$24.81	\$15.85	\$28.82	\$47.06
Auto Rental	\$30.48	\$39.44	\$31.01	\$22.81	\$22.16	\$32.03	\$24.60
Hotel, B&B, etc.	\$23.00	\$29.28	\$24.50	\$22.71	\$28.08	\$20.57	\$14.65
Licenses, Entrance Fees	\$20.25	\$3.93	\$38.51	\$9.88	\$9.21	\$18.99	\$10.21
Retail Sales	\$15.12	\$5.10	\$19.58	\$11.90	\$12.36	\$20.50	\$15.99
Groceries, Snacks	\$11.76	\$5.94	\$14.94	\$10.33	\$8.27	\$12.43	\$10.96
Gasoline, Diesel	\$10.44	\$13.88	\$8.71	\$10.87	\$4.90	\$10.24	\$10.70
Rental Cabin, Condo	\$6.30	\$2.39	\$7.99	\$1.97	\$2.19	\$11.30	\$6.64
Made in Montana	\$4.21	\$2.32	\$2.21	\$5.02	\$3.19	\$6.81	\$7.50
Misc. Services	\$3.47	\$0.00	\$7.83	\$1.13	\$3.71	\$1.89	\$0.85
Gambling	\$0.64	\$0.28	\$0.50	\$1.06	\$0.50	\$0.40	\$0.91
Auto Repair	\$0.26	\$0.00	\$0.34	\$0.05	\$0.00	\$0.82	\$0.00
Farmers Market	\$0.16	\$0.01	\$0.06	\$0.09	\$0.14	\$0.34	\$0.39
Campground, RV Park	\$0.12	\$0.20	\$0.06	\$0.04	\$0.00	\$0.31	\$0.11
Transportation Fares	\$0.04	\$0.00	\$0.07	\$0.04	\$0.18	\$0.03	\$0.01
<b>Total Avg. Daily per Group</b>	<b>\$213.30</b>	<b>\$158.09</b>	<b>\$266.61</b>	<b>\$165.09</b>	<b>\$161.21</b>	<b>\$220.69</b>	<b>\$190.60</b>
<b>Estimate of Statewide Spending</b>	<b>\$986,870,000</b>	<b>\$131,040,000</b>	<b>\$452,730,000</b>	<b>\$57,100,000</b>	<b>\$24,570,000</b>	<b>\$140,370,000</b>	<b>\$154,820,000</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.