
INSTITUTE FOR TOURISM AND RECREATION RESEARCH

2022 ESTIMATES

-

NONRESIDENT VISITATION, EXPENDITURES & ECONOMIC CONTRIBUTION

Estimates by full year, quarters, trip purposes & other visitor segments

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ABOUT OUR WORK

2022 Nonresident Visitation, Expenditures & Economic Impact Estimates

This report is a collection of estimates of 2022 nonresident visitation to Montana, expenditures by nonresident travelers in the state, and the contribution to Montana's economy of that traveler spending.

The following pages provide a look at travel spending by nonresidents during 2022:

- 2022 Nonresident Traveler Expenditures & Economic Contribution
- 2022 Montana Nonresident Traveler Quarterly Travel Comparison
- 2022 Montana Nonresident Traveler Expenditure
- Quarter 1, 2022 Montana Nonresident Traveler Expenditure
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- Quarter 3, 2022 Montana Nonresident Traveler Expenditure
- Quarter 4, 2022 Montana Nonresident Traveler Expenditure
- 2018-2022 Montana Nonresident Traveler Expenditure Trends
- 2012-2022 Montana Nonresident Traveler Visitation Trends
- 2022 Expenditure Comparison of Overseas, Canadian, and Domestic Nonresident Travelers to Montana
- 2022 Montana Airport of Arrival Statewide Nonresident Expenditure Profiles



The Institute for Tourism and Recreation Research prepares these estimates through data collected via in-person interviews with travelers, as well as data from secondary sources. For more information about ITRR's Statewide Nonresident Traveler Survey, please refer to the document found at <http://itr.UMT.edu/files/NonresTravelSurvey-Methods-Analysis.pdf>

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2022 Montana Nonresident Traveler Expenditures & Economic Contribution

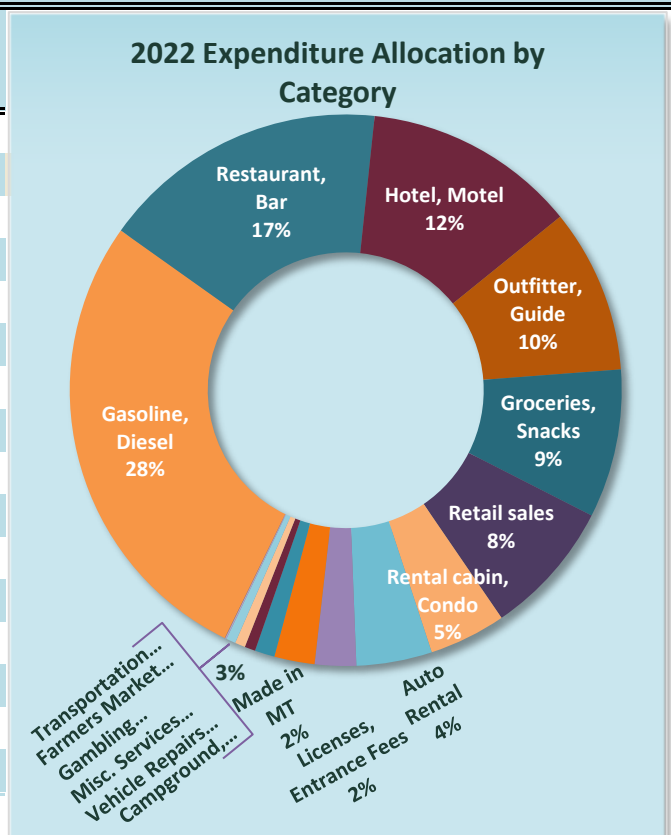


2022 Contribution of Nonresident Traveler Expenditures to Montana's Economy

- In 2022, nonresident visitors to Montana spent an estimated \$5.82 billion in the state. (See Table 1, below)
- This \$5.82 billion in local spending directly supports \$5.22 billion of economic activity in the state, and supports an additional \$3.65 billion of economic activity, indirectly. (see Table 2, below)
- The estimated total contribution of nonresident spending to Montana's economy was \$8.88 billion in 2022.

Table 1 - 2022 Nonresident Traveler Expenditures¹

Expenditure Category	Average Daily Per Group ^{2,3}	Allocation by Category	Total Expenditures ^{2,4}
Gasoline, Diesel	\$57.18	28%	\$1,606,110,000
Restaurant, Bar	\$34.89	17%	\$979,290,000
Hotel, Motel	\$26.14	12%	\$726,690,000
Outfitter, Guide	\$20.01	10%	\$560,020,000
Groceries, Snacks	\$18.09	9%	\$506,460,000
Retail sales	\$16.44	8%	\$462,250,000
Rental cabin, Condo	\$9.38	5%	\$262,090,000
Auto Rental	\$9.24	4%	\$257,630,000
Licenses, Entrance Fees	\$4.93	2%	\$137,520,000
Made in MT	\$4.92	2%	\$68,830,000
Campground, RV Park	\$2.44	1%	\$67,690,000
Vehicle Repairs	\$1.29	1%	\$36,380,000
Misc. Services	\$1.29	1%	\$35,200,000
Gambling	\$1.15	1%	\$32,380,000
Farmers Market	\$0.19	<1%	\$5,330,000
Transportation Fares	\$0.02	<1%	\$610,000
Estimated Total	\$207.61		\$5,816,310,000



¹Spending data are gathered from nonresident travelers intercepted at airports, gas stations, and rest areas in MT.

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

Table 2 - 2022 Economic Impact*

	Direct	Indirect	Induced	Combined
Industry Output	\$5,222,730,000	\$1,987,150,000	\$1,666,440,000	\$8,876,320,000
Employment (# of jobs)	43,900	10,200	10,450	64,550
Employee Compensation	\$1,444,635,000	\$422,000,000	\$456,493,000	\$2,323,128,000
Proprietor Income	\$160,384,000	\$102,463,000	\$69,279,000	\$332,126,000
Other Property Type Income	\$469,692,000	\$273,510,000	\$340,121,000	\$1,083,323,000
State & Local Taxes	\$114,943,000	\$124,750,000	\$75,376,000	\$315,069,000

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. *Figures generated using IMPLAN economic input-output modeling software (2021 data) <https://implan.com/data/> for more info.



2022 Montana Nonresident Traveler Quarterly Travel Comparison



	Quarter 1 (Jan-Mar)	Quarter 2 (Apr-Jun)	Quarter 3 (Jul-Sep)	Quarter 4 (Oct-Dec)	Year Total ¹ 2022
Visitation & Length of Stay					
Nonresident Visitors	1,589,000	3,442,000	5,419,000	2,056,000	12,506,000
% of Total	13%	28%	43%	16%	100%
Nonresident Travel Groups	776,000	1,540,000	2,315,000	993,000	5,624,000
% of Total	14%	27%	41%	18%	100%
Group Size (people per group)	2.04	2.25	2.33	2.05	2.23
Length of Stay (nights)	3.98	4.49	5.53	5.35	5.02
Expenditure Category^{2,3} (Average Daily per Group)	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Year Total¹
Gasoline, Diesel	\$57.61	\$62.98	\$54.61	\$55.28	\$57.18
Restaurant, Bar	\$37.82	\$37.17	\$33.63	\$32.94	\$34.88
Hotel, Motel	\$39.13	\$28.62	\$25.14	\$16.22	\$26.10
Outfitter, Guide	\$0.20	\$13.47	\$30.13	\$15.17	\$20.05
Groceries, Snacks	\$17.79	\$18.11	\$19.10	\$15.40	\$18.08
Retail sales	\$17.32	\$21.39	\$13.46	\$16.67	\$16.44
Rental cabin, Condo	\$17.60	\$6.98	\$9.23	\$7.78	\$9.36
Auto Rental	\$12.46	\$10.19	\$8.84	\$6.69	\$9.23
Licenses, Entrance Fees	\$8.59	\$3.44	\$3.80	\$7.85	\$4.92
Made in MT	\$2.51	\$3.55	\$6.66	\$3.76	\$4.92
Campground, RV Park	\$0.05	\$2.38	\$3.80	\$0.46	\$2.46
Vehicle Repairs	\$0.88	\$0.63	\$1.70	\$1.42	\$1.29
Misc. Services	\$1.16	\$2.16	\$1.27	\$0.08	\$1.28
Gambling	\$2.11	\$1.66	\$0.53	\$1.43	\$1.14
Farmers Market	\$0.00	\$0.16	\$0.28	\$0.12	\$0.19
Transportation Fares	\$0.02	\$0.03	\$0.01	\$0.04	\$0.02
	\$215.25	\$212.92	\$212.19	\$181.31	\$207.56
Total Expenditures	\$664,680,000	\$1,472,150,000	\$2,715,870,000	\$963,610,000	\$5,816,310,000
% of Total	11%	25%	47%	17%	100%

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



2022

Montana Nonresident Traveler Expenditure



Average 2022 Daily Expenditures by Purpose of Trip[^]

	Primary Purpose of Trip						
	All Travelers	Vacation	VFR ¹	Pass-Through	Business	Shopping*	Other
Sample size	7,659	2,800	1,517	2,049	933	63	297
Nonresident Travelers	12,505,000	4,570,000	2,478,000	3,346,000	1,524,000	103,000	484,000
Group Size (people/group)	2.31	2.54	2.26	2.05	1.57	2.16	2.11
Length of Stay (nights)	5.00	5.99	6.18	1.11	7.53	1.39	10.15
% of All Travelers in 2022	100%	37%	20%	27%	12%	1%	4%
Gasoline, Diesel	\$57.18	\$52.73	\$42.82	\$79.21	\$50.73	\$54.69	\$41.74
Restaurant, Bar	\$34.89	\$44.11	\$44.61	\$16.67	\$36.96	\$10.94	\$38.29
Hotel, B&B, etc.	\$26.14	\$31.84	\$16.93	\$22.44	\$36.63	\$4.96	\$19.13
Outfitter, Guide	\$20.01	\$46.76	\$6.64	\$0.73	\$4.55	\$0.00	\$3.68
Groceries, Snacks	\$18.09	\$22.01	\$25.27	\$9.74	\$12.36	\$27.32	\$21.16
Retail Sales	\$16.44	\$19.86	\$17.11	\$10.17	\$15.74	\$47.22	\$22.45
Rental Cabin, Condo	\$9.38	\$21.41	\$5.70	\$0.66	\$3.95	\$0.89	\$11.21
Auto Rental	\$9.24	\$15.47	\$10.60	\$0.60	\$11.25	\$0.00	\$5.37
Licenses, Entrance Fees	\$4.93	\$9.69	\$4.67	\$0.88	\$2.46	\$2.70	\$7.15
Made in MT	\$4.92	\$5.98	\$6.12	\$1.22	\$6.58	\$39.78	\$6.88
Campground, RV Park	\$2.46	\$4.67	\$0.73	\$1.63	\$0.40	\$0.00	\$0.95
Auto Repair	\$1.29	\$1.02	\$1.67	\$0.33	\$3.10	\$0.00	\$3.01
Misc. Services	\$1.29	\$1.01	\$1.47	\$0.31	\$1.84	\$0.07	\$7.74
Gambling	\$1.15	\$0.37	\$2.60	\$0.55	\$1.52	\$0.11	\$2.33
Farmers Market	\$0.19	\$0.28	\$0.17	\$0.05	\$0.21	\$0.00	\$0.23
Transportation Fares	\$0.02	\$0.03	\$0.00	\$0.00	\$0.09	\$0.00	\$0.04
Total Avg. Daily per Group	\$207.61	\$277.21	\$187.10	\$145.18	\$188.35	\$188.69	\$191.37

Average Daily Expenditures of Those Who Spent in Each Category^{^^}

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=6,091)	Mean ² of Those Who Spent	Median ³ of Those Who Spent
Gasoline, Diesel	4,347	71%	\$80.40	\$67.00
Restaurant, Bar	2,999	49%	\$70.81	\$50.00
Groceries, Snacks	2,202	36%	\$50.27	\$33.00
Hotel, B&B, etc.	1,893	31%	\$168.47	\$150.00
Licenses, Entrance Fees	878	14%	\$33.27	\$12.50
Retail Sales	823	14%	\$123.14	\$60.00
Campground, RV Park	754	12%	\$46.26	\$45.00
Made in MT	574	9%	\$51.74	\$30.00
Auto Rental	527	9%	\$108.57	\$100.00
Rental Cabin, Condo	400	7%	\$280.31	\$200.00
Farmers Market	266	4%	\$4.37	\$3.75
Outfitter, Guide	266	4%	\$451.25	\$250.00
Misc. Services	160	3%	\$52.03	\$23.44
Gambling	139	2%	\$50.92	\$54.22
Auto Repair	80	1%	\$95.31	\$60.97
Transportation Fares	17	<1%	\$7.46	\$6.96

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

[^] Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups.

^{^^}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.

¹Visiting friends and/or relatives. ²Mean, or average, is the sum of the values divided by the number of values. ³Median 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, 2022

Montana Nonresident Traveler Expenditure



Average Q1 Daily Expenditures by Purpose of Trip[^]

	Primary Purpose of Trip						
	All Travelers	Vacation	VFR ¹	Pass-Through	Business	Shopping*	Other*
Sample size	946	168	239	280	195	16	48
Nonresident Travelers	1,589,000	282,000	402,000	470,000	328,000	27,000	80,000
Group Size (people/group)	2.02	2.76	2.16	1.82	1.53	2.79	1.73
Length of Stay (nights)	3.98	4.60	5.34	0.53	5.75	0.05	9.46
% of All Travelers in Q1	100%	18%	25%	30%	21%	2%	5%
Gasoline, Diesel	\$57.61	\$50.25	\$36.57	\$82.06	\$53.58	\$45.86	\$35.30
Hotel, B&B, etc.	\$39.13	\$64.01	\$22.94	\$30.99	\$53.89	\$0.00	\$34.54
Restaurant, Bar	\$37.82	\$67.79	\$45.87	\$15.33	\$38.12	\$13.18	\$23.16
Groceries, Snacks	\$17.79	\$19.77	\$23.02	\$13.89	\$9.04	\$72.76	\$31.52
Rental Cabin, Condo	\$17.60	\$83.78	\$8.35	\$0.00	\$7.67	\$0.00	\$1.09
Retail Sales	\$17.32	\$9.89	\$6.98	\$17.36	\$25.20	\$112.28	\$18.17
Auto Rental	\$12.46	\$34.80	\$13.06	\$2.42	\$11.09	\$0.00	\$5.65
Licenses, Entrance Fees	\$8.59	\$35.16	\$10.21	\$0.33	\$0.41	\$0.00	\$5.89
Made in MT	\$2.51	\$1.86	\$6.56	\$0.77	\$1.62	\$0.42	\$3.73
Gambling	\$2.11	\$0.24	\$2.59	\$1.55	\$1.83	\$7.84	\$0.25
Misc. Services	\$1.16	\$0.19	\$1.45	\$1.39	\$1.06	\$4.89	\$0.82
Auto Repair	\$0.88	\$0.02	\$0.83	\$1.08	\$1.50	\$0.00	\$0.00
Outfitter, Guide	\$0.20	\$0.35	\$0.27	\$0.00	\$0.02	\$0.00	\$1.64
Campground, RV Park	\$0.05	\$0.18	\$0.00	\$0.05	\$0.00	\$0.00	\$0.00
Transportation Fares	\$0.02	\$0.00	\$0.00	\$0.00	\$0.08	\$0.00	\$0.12
Farmers Market	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.01
Total Avg. Daily per Group	\$215.25	\$368.28	\$178.70	\$167.22	\$205.12	\$257.23	\$161.90

Average Daily Expenditures of Those Who Spent in Each Category^{^^}

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=966)	Mean ² of Those Who Spent	Median ³ of Those Who Spent
Gasoline, Diesel	583	60%	\$75.38	\$65.00
Restaurant, Bar	368	38%	\$75.15	\$50.00
Groceries, Snacks	319	33%	\$42.67	\$30.00
Hotel, B&B, etc.	251	26%	\$139.56	\$120.00
Retail Sales	96	10%	\$137.38	\$50.00
Auto Rental	85	9%	\$112.51	\$120.00
Made in MT	63	6%	\$30.60	\$12.00
Licenses, Entrance Fees	57	6%	\$114.49	\$40.00
Rental Cabin, Condo	55	6%	\$287.20	\$300.00
Misc. Services	27	3%	\$33.34	\$25.00
Gambling	23	2%	\$69.08	\$87.34
Auto Repair	18	2%	\$37.20	\$30.00
Outfitter, Guide	7	1%	\$21.88	\$15.55
Campground, RV Park	6	1%	\$6.84	\$6.84
Farmers Market	5	1%	\$0.08	\$0.08
Transportation Fares	1	<1%	\$14.27	\$17.10

[^] Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups.

^{^^} 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.

¹Visiting friends and/or relatives. ²Mean, or average, is the sum of the values divided by the number of values. ³Median 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, 2022

Montana Nonresident Traveler Expenditure



Average Q2 Daily Expenditures by Purpose of Trip[^]

	Primary Purpose of Trip						
	All Travelers	Vacation	VFR ¹	Pass-Through	Business	Shopping*	Other*
Sample size	2,129	685	377	658	270	21	118
Nonresident Travelers	3,442,000	1,107,000	610,000	1,065,000	437,000	33,000	191,000
Group Size (people/group)	2.25	2.64	2.29	2.10	1.48	1.68	2.32
Length of Stay (nights)	4.49	5.57	5.59	1.21	6.94	0.28	7.89
% of All Travelers in Q2	100%	32%	18%	31%	13%	1%	6%
Gasoline, Diesel	\$62.98	\$57.03	\$43.21	\$1.86	\$0.35	\$0.00	\$0.30
Restaurant, Bar	\$37.17	\$45.75	\$52.00	\$26.04	\$40.15	\$3.80	\$16.36
Hotel, B&B, etc.	\$28.62	\$36.83	\$13.75	\$0.33	\$4.82	\$0.00	\$23.65
Retail Sales	\$21.39	\$21.31	\$27.57	\$87.44	\$49.67	\$58.11	\$46.28
Groceries, Snacks	\$18.11	\$22.69	\$20.67	\$18.64	\$37.54	\$6.80	\$52.43
Rental Cabin, Condo	\$6.98	\$12.83	\$4.29	\$0.04	\$0.02	\$0.00	\$0.00
Campground, RV Park	\$2.38	\$4.92	\$0.67	\$11.43	\$13.35	\$53.82	\$24.71
Farmers Market	\$0.16	\$0.41	\$0.05	\$16.45	\$12.19	\$65.27	\$39.92
Outfitter, Guide	\$13.47	\$35.13	\$0.92	\$1.11	\$0.02	\$0.00	\$1.18
Auto Rental	\$10.19	\$18.84	\$8.04	\$0.66	\$16.43	\$0.00	\$6.78
Auto Repair	\$0.63	\$0.49	\$1.25	\$0.21	\$1.55	\$0.00	\$0.29
Transportation Fares	\$0.03	\$0.00	\$0.00	\$0.00	\$0.19	\$0.00	\$0.05
Licenses, Entrance Fees	\$3.44	\$6.07	\$3.83	\$0.80	\$2.79	\$0.00	\$4.11
Gambling	\$1.66	\$0.29	\$4.47	\$0.56	\$1.80	\$0.00	\$4.79
Misc. Services	\$2.16	\$1.99	\$2.00	\$0.39	\$1.58	\$0.00	\$14.06
Made in MT	\$3.55	\$6.33	\$3.80	\$0.91	\$3.56	\$0.00	\$3.04
Total Avg. Daily per Group	\$212.92	\$270.91	\$186.53	\$166.86	\$186.00	\$187.80	\$237.95

Average Daily Expenditures of Those Who Spent in Each Category^{^^}

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=1,760)	Mean ² of Those Who Spent	Median ³ of Those Who Spent
Gasoline, Diesel	1,265	72%	\$87.63	\$75.00
Restaurant, Bar	945	54%	\$69.16	\$50.00
Groceries, Snacks	683	39%	\$46.64	\$31.94
Hotel, B&B, etc.	604	34%	\$155.91	\$150.00
Retail Sales	295	17%	\$127.46	\$64.83
Licenses, Entrance Fees	271	15%	\$22.23	\$11.06
Campground, RV Park	187	11%	\$45.54	\$45.00
Auto Rental	165	9%	\$108.56	\$95.00
Made in MT	158	9%	\$39.48	\$30.00
Rental Cabin, Condo	114	6%	\$201.99	\$180.00
Outfitter, Guide	66	4%	\$356.88	\$200.00
Misc. Services	66	4%	\$57.21	\$24.14
Gambling	56	3%	\$51.88	\$60.00
Farmers Market	53	3%	\$5.16	\$5.00
Auto Repair	19	1%	\$57.13	\$73.40
Transportation Fares	7	<1%	\$6.96	\$6.96

[^] Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups.

^{^^}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.

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¹Visiting friends and/or relatives. ²Mean, or average, is the sum of the values divided by the number of values. ³Median 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, 2022

Montana Nonresident Traveler Expenditure



Average Q3 Daily Expenditures by Purpose of Trip[^]

	Primary Purpose of Trip						
	All Travelers	Vacation	VFR ¹	Pass-Through	Business	Shopping*	Other*
Sample size	3,486	1,647	634	770	320	15	100
Nonresident Travelers	5,419,000	2,560,000	986,000	1,197,000	497,000	23,000	155,000
Group Size (people/group)	2.33	2.53	2.40	2.12	1.76	2.33	2.02
Length of Stay (nights)	5.53	6.33	6.68	1.10	8.80	5.53	10.56
% of All Travelers in Q3	100%	47%	18%	22%	9%	0%	3%
Gasoline, Diesel	\$54.61	\$49.72	\$43.41	\$73.86	\$56.94	\$50.83	\$43.63
Restaurant, Bar	\$33.63	\$40.71	\$40.30	\$15.75	\$36.00	\$10.93	\$26.26
Outfitter, Guide	\$30.13	\$55.93	\$15.12	\$0.89	\$12.54	\$0.00	\$9.54
Hotel, B&B, etc.	\$25.14	\$28.59	\$19.22	\$21.69	\$29.21	\$2.73	\$20.99
Groceries, Snacks	\$19.10	\$21.84	\$29.96	\$8.87	\$14.46	\$27.14	\$11.28
Retail Sales	\$13.46	\$19.04	\$12.40	\$3.86	\$10.51	\$46.98	\$10.43
Rental Cabin, Condo	\$9.23	\$16.42	\$6.22	\$0.57	\$3.30	\$1.09	\$4.31
Auto Rental	\$8.84	\$12.88	\$11.78	\$0.38	\$6.66	\$0.00	\$5.54
Made in MT	\$6.66	\$6.42	\$7.71	\$2.25	\$12.17	\$48.84	\$14.82
Campground, RV Park	\$3.80	\$6.12	\$1.33	\$2.54	\$0.84	\$0.00	\$2.65
Licenses, Entrance Fees	\$3.80	\$4.34	\$4.71	\$0.79	\$3.97	\$0.00	\$14.58
Auto Repair	\$1.70	\$0.70	\$2.98	\$0.48	\$5.27	\$0.00	\$8.80
Misc. Services	\$1.27	\$0.95	\$1.87	\$0.11	\$3.26	\$0.00	\$5.96
Gambling	\$0.53	\$0.30	\$1.58	\$0.38	\$0.27	\$0.00	\$0.25
Farmers Market	\$0.28	\$0.31	\$0.34	\$0.12	\$0.36	\$0.00	\$0.64
Transportation Fares	\$0.01	\$0.02	\$0.00	\$0.00	\$0.04	\$0.00	\$0.00
Total Avg. Daily per Group	\$212.19	\$264.29	\$198.93	\$132.54	\$195.80	\$188.54	\$179.68

Average Daily Expenditures of Those Who Spent in Each Category^{^^}

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=2,802)	Mean ² of Those Who Spent	Median ³ of Those Who Spent
Gasoline, Diesel	1,938	69%	\$78.72	\$62.00
Restaurant, Bar	1,331	48%	\$70.77	\$50.00
Groceries, Snacks	962	34%	\$55.56	\$40.00
Hotel, B&B, etc.	822	29%	\$191.07	\$170.00
Campground, RV Park	525	19%	\$48.16	\$45.00
Licenses, Entrance Fees	448	16%	\$23.72	\$10.00
Retail Sales	341	12%	\$110.44	\$60.00
Made in MT	284	10%	\$65.72	\$30.00
Auto Rental	225	8%	\$109.95	\$100.00
Rental Cabin, Condo	198	7%	\$291.26	\$249.73
Farmers Market	191	7%	\$4.18	\$3.33
Outfitter, Guide	181	6%	\$465.39	\$256.00
Misc. Services	63	2%	\$56.46	\$20.00
Gambling	40	1%	\$37.17	\$53.43
Auto Repair	33	1%	\$143.03	\$99.38
Transportation Fares	4	<1%	\$8.79	\$8.79

[^] Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups.

^{^^} 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.

¹Visiting friends and/or relatives. ²Mean, or average, is the sum of the values divided by the number of values. ³Median 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, 2022

Montana Nonresident Traveler Expenditure



Average Q4 Daily Expenditures by Purpose of Trip[^]

	Primary Purpose of Trip						
	All Travelers	Vacation	VFR ¹	Pass-Through	Business	Shopping*	Other*
Sample size	1,098	300	267	341	148	11	31
Nonresident Travelers	2,056,000	561,000	500,000	637,000	278,000	21,000	58,000
Group Size (people/group)	2.58	2.32	2.08	2.04	1.43	1.90	2.20
Length of Stay (nights)	5.35	6.10	6.64	1.40	8.49	0.72	16.97
% of All Travelers in Q4	100%	27%	24%	31%	14%	1%	3%
Gasoline, Diesel	\$55.28	\$58.40	\$45.63	\$69.15	\$36.77	\$82.92	\$30.22
Restaurant, Bar	\$32.94	\$42.34	\$44.49	\$14.59	\$36.79	\$13.20	\$40.32
Retail Sales	\$16.67	\$25.59	\$22.60	\$3.70	\$21.00	\$29.98	\$0.18
Hotel, B&B, etc.	\$16.22	\$19.92	\$11.43	\$12.38	\$27.70	\$23.06	\$4.59
Groceries, Snacks	\$15.40	\$22.65	\$22.36	\$5.77	\$10.34	\$7.21	\$21.04
Outfitter, Guide	\$15.17	\$54.22	\$0.18	\$0.00	\$0.00	\$0.00	\$0.00
Licenses, Entrance Fees	\$7.85	\$22.67	\$1.54	\$1.43	\$1.17	\$25.03	\$0.40
Rental Cabin, Condo	\$7.78	\$22.49	\$4.26	\$1.78	\$0.00	\$0.00	\$0.00
Auto Rental	\$6.69	\$10.10	\$9.21	\$0.00	\$13.17	\$0.00	\$0.00
Made in MT	\$3.76	\$5.84	\$5.10	\$0.46	\$5.16	\$0.00	\$3.79
Gambling	\$1.43	\$0.79	\$2.65	\$0.33	\$3.25	\$0.00	\$1.95
Auto Repair	\$1.42	\$3.54	\$0.09	\$0.00	\$2.73	\$0.00	\$1.40
Campground, RV Park	\$0.46	\$1.09	\$0.10	\$0.43	\$0.00	\$0.00	\$0.06
Farmers Market	\$0.12	\$0.11	\$0.10	\$0.00	\$0.41	\$0.00	\$0.23
Misc. Services	\$0.08	\$0.09	\$0.12	\$0.00	\$0.20	\$0.00	\$0.00
Transportation Fares	\$0.04	\$0.11	\$0.00	\$0.00	\$0.06	\$0.00	\$0.00
	\$181.31	\$289.95	\$169.86	\$110.02	\$158.75	\$181.40	\$104.18

Average Daily Expenditures of Those Who Spent in Each Category^{^^}

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=765)	Mean ² of Those Who Spent	Median ³ of Those Who Spent
Gasoline, Diesel	561	73%	\$75.14	\$61.00
Restaurant, Bar	355	46%	\$70.85	\$50.00
Groceries, Snacks	238	31%	\$49.46	\$30.00
Hotel, B&B, etc.	215	28%	\$151.06	\$140.00
Licenses, Entrance Fees	101	13%	\$59.13	\$35.00
Retail Sales	90	12%	\$141.98	\$80.00
Made in MT	69	9%	\$41.55	\$30.00
Auto Rental	53	7%	\$96.45	\$68.71
Campground, RV Park	35	5%	\$28.53	\$36.24
Rental Cabin, Condo	33	4%	\$473.64	\$264.22
Gambling	20	3%	\$54.38	\$60.00
Farmers Market	17	2%	\$5.27	\$7.75
Outfitter, Guide	11	1%	\$1,071.95	\$1,465.56
Auto Repair	9	1%	\$117.34	\$130.08
Transportation Fares	5	1%	\$5.59	\$5.59
Misc. Services	4	<1%	\$16.86	\$17.42

[^] Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups.

^{^^} 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.

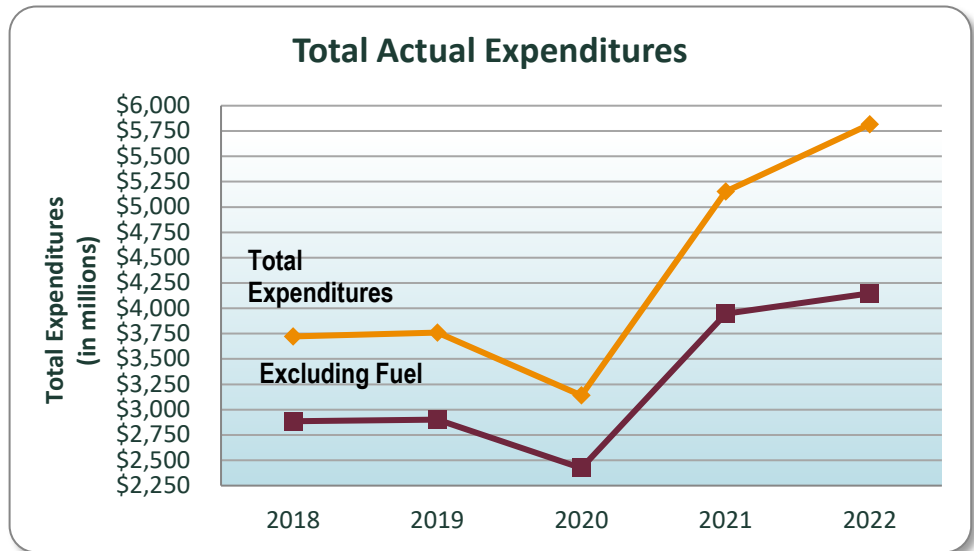
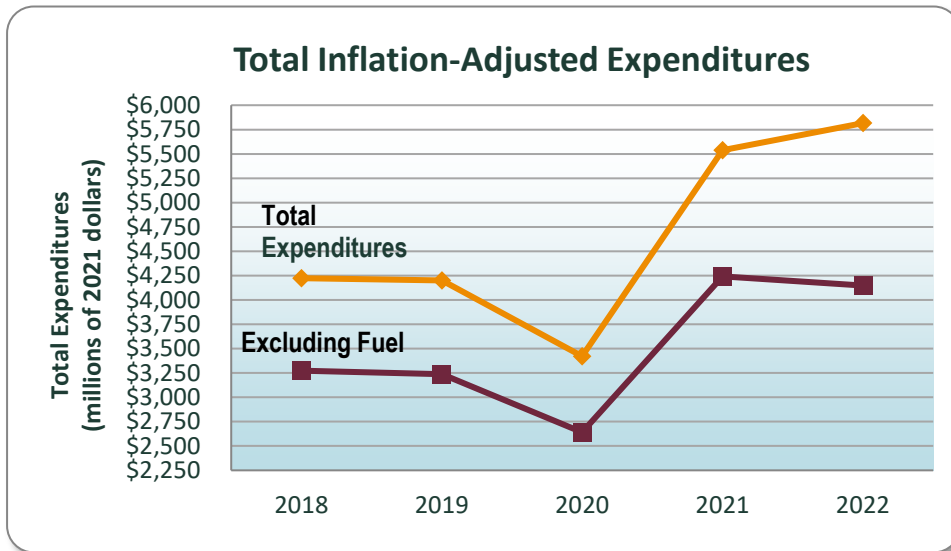
Spending data are gathered from nonresident travelers intercepted at airports, gas stations, and rest areas in MT. Expenditures represent 24 hours worth of travel group spending.

¹Visiting friends and/or relatives. ²Mean, or average, is the sum of the values divided by the number of values. ³Median 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.



2018-2022 Montana Nonresident Traveler Expenditure Trends

Overall Total & Excluding Fuel*

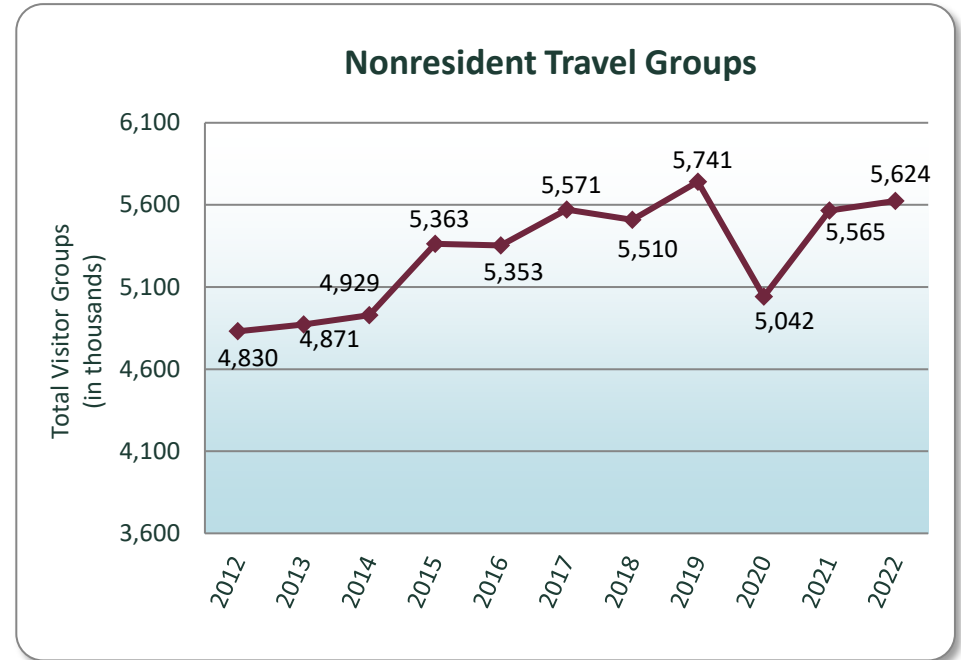
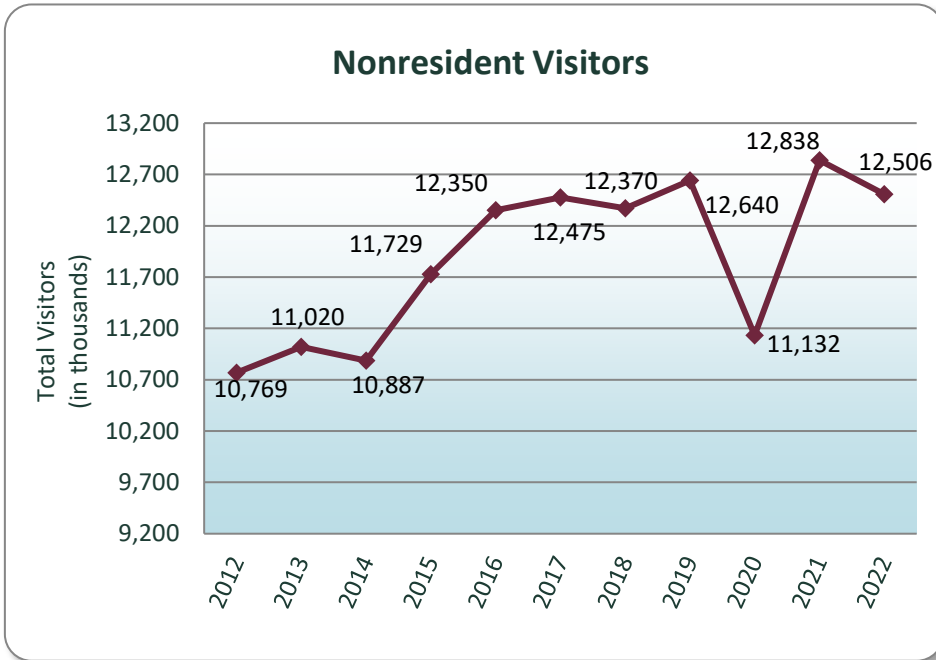


Nonresident Traveler Expenditure Trends	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Total Inflation-adjusted Expenditures (millions of 2022 dollars ¹)	\$4,055	\$4,425	\$4,687	\$3,889	\$3,603	\$3,896	\$4,224	\$4,201	\$3,422	\$5,537	\$5,816
% Change from Previous Year	14.5%	9.1%	5.9%	-17.0%	-7.4%	8.1%	8.4%	-0.5%	-18.5%	61.8%	5.0%
<u>Excluding Fuel</u> Expenditures (2022\$)	\$2,625	\$3,002	\$3,198	\$3,015	\$2,848	\$3,006	\$3,272	\$3,239	\$2,641	\$4,242	\$4,148
% Change from Previous Year	12.6%	14.4%	6.5%	-5.7%	-5.5%	5.5%	8.8%	-1.0%	-18.5%	60.6%	-2.2%
Total Actual Expenditures (in millions)	\$3,269	\$3,624	\$3,900	\$3,233	\$3,036	\$3,365	\$3,724	\$3,761	\$3,140	\$5,152	\$5,816
% Change from Previous Year	17.8%	10.9%	7.6%	-17.1%	-6.1%	10.8%	10.7%	1.0%	-16.5%	64.1%	12.9%
<u>Excluding Fuel</u> Expenditures	\$2,116	\$2,459	\$2,661	\$2,506	\$2,400	\$2,596	\$2,885	\$2,900	\$2,423	\$3,947	\$4,148
% Change from Previous Year	15.8%	16.2%	8.2%	-5.8%	-4.2%	8.2%	11.1%	0.5%	-16.4%	62.9%	5.1%

*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. ¹U.S. Bureau of Labor Statistics. Consumer Price Index - All Urban Consumers. *2020 expenditures include Q2 estimates based on 2019.



2012-2022 Montana Nonresident Traveler Visitation Trends



Nonresident Traveler Visitation Trends	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	
Nonresident Visitors (in thousands)	10,769	11,020	10,887	11,729	12,350	12,475	12,370	12,640	11,132	12,838	12,506	
% Change from Previous Year		2.1%	2.3%	-1.2%	7.7%	5.3%	1.0%	-0.8%	2.2%	-11.9%	15.3%	-2.6%
Nonresident Travel Groups (in thousands ¹)	4,830	4,871	4,929	5,363	5,353	5,571	5,510	5,741	5,042	5,565	5,624	
% Change from Previous Year		7.0%	0.8%	1.2%	8.8%	-0.2%	4.1%	-1.1%	4.2%	-12.2%	10.4%	1.1%
Average people per group	2.22	2.24	2.19	2.19	2.31	2.23	2.27	2.18	2.19	2.28	2.23	

¹Beginning in 2010, group size is a weighted average of quarterly group sizes.



2022 Expenditure Comparison of Overseas, Canadian, and Domestic Nonresident Travelers to Montana



Overseas Visitors ¹				Canadian Visitors				Domestic Visitors			
Sample size	72			576			7,061				
Nonresident Travelers	116,000			945,000			11,444,000				
Group Size (people/group)	2.75			2.17			2.21				
Length of Stay (nights)	4.11			2.34			5.21				
% of All Travelers in 2022	1%			8%			92%				

Expenditure Category ^{2,3}	Overseas Visitors ¹			Canadian Visitors			Domestic Visitors		
	Avg. Daily Group Expend. ⁴	% of Daily Expend.	Avg. Trip Expend	Avg. Daily Group Expend. ⁴	% of Daily Expend.	Avg. Trip Expend	Avg. Daily Group Expend. ⁴	% of Daily Expend.	Avg. Trip Expend
Gasoline, Diesel	\$40.51	22%	\$166.39	\$72.85	43%	\$170.22	\$56.11	27%	\$292.18
Restaurant, Bar	\$30.62	16%	\$125.75	\$21.71	13%	\$50.73	\$35.79	17%	\$186.39
Hotel, B&B, etc.	\$27.62	15%	\$113.43	\$29.36	17%	\$68.59	\$25.79	12%	\$134.32
Outfitter, Guide	\$12.98	7%	\$53.31	\$1.03	1%	\$2.41	\$21.60	10%	\$112.50
Groceries, Snacks	\$27.37	15%	\$112.41	\$17.36	10%	\$40.57	\$18.22	9%	\$94.88
Retail Sales	\$13.41	7%	\$55.09	\$16.16	10%	\$37.75	\$16.49	8%	\$85.88
Rental Cabin, Condo	\$4.17	2%	\$17.13	\$1.73	1%	\$4.04	\$10.08	5%	\$52.47
Auto Rental	\$4.61	2%	\$18.94	\$0.00	<1%	\$0.00	\$10.06	5%	\$52.40
Made in Montana	\$10.62	6%	\$43.64	\$1.07	1%	\$2.50	\$5.18	2%	\$26.98
Licenses, Entrance Fees	\$3.10	2%	\$12.75	\$1.87	1%	\$4.38	\$5.14	2%	\$26.77
Campground, RV Park	\$8.41	4%	\$34.54	\$2.81	2%	\$6.56	\$2.39	1%	\$12.45
Auto Repair	\$0.00	<1%	\$0.00	\$1.06	1%	\$2.47	\$1.34	1%	\$6.97
Misc. Services	\$4.48	2%	\$18.40	\$1.39	1%	\$3.25	\$1.28	1%	\$6.68
Gambling	\$0.00	<1%	\$0.00	\$0.41	<1%	\$0.97	\$1.23	1%	\$6.41
Farmers Market	\$0.44	<1%	\$1.81	\$0.04	<1%	\$0.10	\$0.20	<1%	\$1.04
Transportation Fares	\$0.00	<1%	\$0.00	\$0.00	<1%	\$0.00	\$0.02	<1%	\$0.11
Total Average Daily per Group	\$188.36		\$773.59	\$168.86		\$394.55	\$210.93		\$1,098.42
Total 2022 Expenditures	\$39,697,000			\$167,998,000			\$5,608,613,000		
% of Total	1%			3%			96%		

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



2022 Montana Airport of Arrival Statewide Nonresident Expenditure Profiles



Avg. Daily Group Expenditures by Airport of Arrival¹ (Expenditures represent full trip in MT, not spending exclusively in arrival city.)

	Airport of Arrival in Montana ^{2, 3}						
	All Fliers	Billings	Bozeman	Great Falls	Helena	Kalispell	Missoula
Sample size	841	111	377	48	25	161	109
Nonresident Travelers	1,352,000	179,000	607,000	77,000	40,000	259,000	176,000
Group Size (people/group)	2.35	1.66	2.63	1.73	2.55	2.55	2.27
Length of Stay (nights)	7.13	5.54	7.91	6.73	6.49	6.49	6.32
% of All Travelers in 2022	10.8%	1.4%	4.9%	0.6%	0.3%	2.1%	1.4%
Outfitter, Guide	\$65.83	\$46.53	\$74.22	\$26.09	\$33.71	\$78.72	\$62.19
Restaurant, Bar	\$59.49	\$68.76	\$57.19	\$43.31	\$41.62	\$81.01	\$38.40
Auto Rental	\$44.87	\$0.55	\$71.28	\$54.71	\$27.27	\$27.30	\$32.37
Licenses, Entrance Fees	\$30.04	\$31.85	\$30.20	\$18.42	\$25.53	\$34.28	\$26.28
Hotel, B&B, etc.	\$25.78	\$18.56	\$30.24	\$16.52	\$11.60	\$36.47	\$8.01
Retail Sales	\$24.69	\$30.91	\$28.78	\$18.21	\$11.89	\$21.45	\$14.30
Groceries, Snacks	\$18.40	\$1.33	\$28.22	\$5.46	\$2.38	\$17.09	\$15.01
Gasoline, Diesel	\$15.77	\$17.75	\$14.77	\$18.94	\$31.08	\$12.88	\$17.24
Rental Home, Cabin, Condo	\$8.78	\$4.34	\$12.94	\$5.55	\$28.01	\$4.04	\$3.72
Made in Montana	\$8.33	\$3.18	\$7.48	\$9.75	\$19.24	\$8.27	\$14.26
Misc. Services	\$1.63	\$2.13	\$2.51	\$0.07	\$0.00	\$0.00	\$1.72
Gambling	\$1.51	\$3.28	\$0.55	\$0.70	\$0.30	\$3.00	\$1.31
Farmers Market	\$0.58	\$0.90	\$0.30	\$2.12	\$1.53	\$0.05	\$1.15
Campground, RV Park	\$0.39	\$0.21	\$0.46	\$0.24	\$0.00	\$0.21	\$0.76
Transportation Fares	\$0.20	\$0.00	\$0.23	\$0.10	\$0.21	\$0.12	\$0.41
Vehicle Repair	\$0.08	\$0.20	\$0.00	\$0.10	\$0.15	\$0.00	\$0.31
Total Avg. Daily per Group	\$306.36	\$230.47	\$359.35	\$220.29	\$234.53	\$324.90	\$237.45
Estimate of Statewide Spending	\$1,361,190,000	\$105,360,000	\$793,520,000	\$52,040,000	\$35,920,000	\$250,630,000	\$121,070,000

¹Spending 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. ²Spending data presented here are representative of expenditures in MT by traveler groups who flew into one of the listed airports. ³Butte and West Yellowstone airports had insufficient sample sizes for inclusion in this analysis.