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### 2023 Estimates - Nonresident Visitation, Expenditures, and Economic Contribution

Kara Grau

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# 2023 ESTIMATES NONRESIDENT VISITATION, EXPENDITURES & ECONOMIC CONTRIBUTION

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

Kara Grau | April 2024

# ABOUT OUR WORK

This report is a collection of estimates of 2023 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 2023:

- 2023 Nonresident Traveler Expenditures & Economic Contribution
- 2023 Montana Nonresident Traveler Quarterly Travel Comparison
- 2023 Montana Nonresident Traveler Expenditure
- Quarter 1, 2023 Montana Nonresident Traveler Expenditure
- Quarter 2, 2023 Montana Nonresident Traveler Expenditure
- Quarter 3, 2023 Montana Nonresident Traveler Expenditure
- Quarter 4, 2023 Montana Nonresident Traveler Expenditure
- 2019-2023 Montana Nonresident Traveler Expenditure Trends
- 2013-2023 Montana Nonresident Traveler Visitation Trends
- 2023 Expenditure Comparison of Overseas, Canadian, and Domestic Nonresident Travelers to Montana
- 2023 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://itrr.umt.edu/files/NonresTravelSurvey-Methods-Analysis.pdf>

This study was funded by the Lodging Facility Use Tax



The Institute for Tourism and Recreation Research (ITRR) was created in 1987 to conduct research on travel, recreation and tourism. Located in The University of Montana, W.A. Franke College of Forestry and Conservation, ITRR serves as the research arm for Montana's tourism and recreation industry. Its overall mission is to provide information that will help the industry make informed decisions about planning, promotion and management.

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# 2023 Montana Nonresident Traveler Expenditures & Economic Contribution

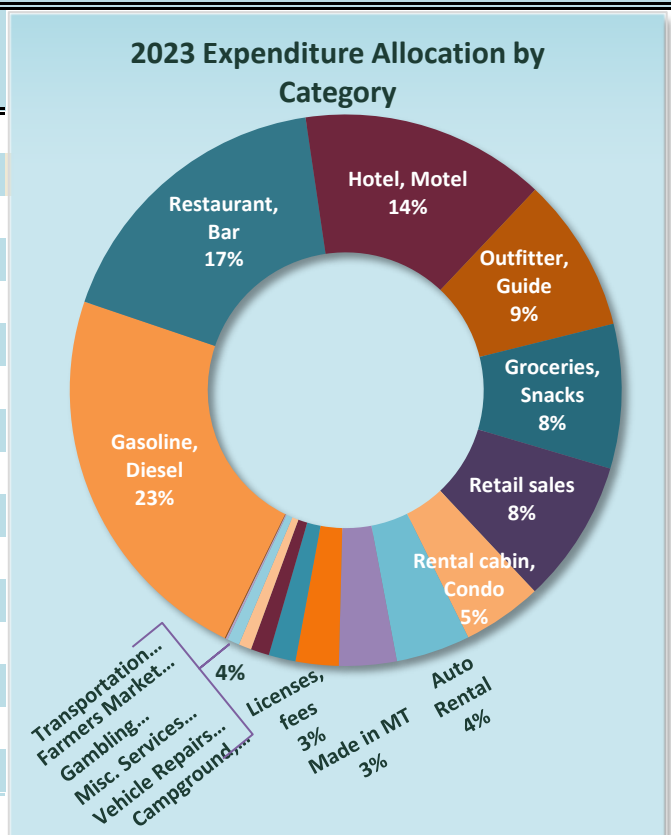


## 2023 Contribution of Nonresident Traveler Expenditures to Montana's Economy

- In 2023, nonresident visitors to Montana spent an estimated \$5.45 billion in the state. (See Table 1, below)
- This \$5.45 billion in local spending directly supports \$4.84 billion of economic activity in the state, and supports an additional \$3.37 billion of economic activity, indirectly. (see Table 2, below)
- The estimated total contribution of nonresident spending to Montana's economy was \$8.21 billion in 2023.

**Table 1 - 2023 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	\$44.46	23%	\$1,253,380,000
Restaurant, Bar	\$34.10	17%	\$952,430,000
Hotel, Motel	\$27.91	14%	\$783,830,000
Outfitter, Guide	\$18.19	9%	\$495,150,000
Groceries, Snacks	\$16.49	8%	\$461,640,000
Retail sales	\$16.40	8%	\$458,640,000
Rental cabin, Condo	\$9.19	5%	\$255,360,000
Auto Rental	\$8.56	4%	\$237,110,000
Made in MT	\$6.61	3%	\$183,900,000
Licenses, Entrance Fees	\$4.88	3%	\$137,730,000
Campground, RV Park	\$3.10	2%	\$85,940,000
Vehicle Repairs	\$2.08	1%	\$58,770,000
Misc. Services	\$1.44	1%	\$40,900,000
Gambling	\$1.37	1%	\$38,830,000
Farmers Market	\$0.26	<1%	\$7,150,000
Transportation Fares	\$0.10	<1%	\$2,750,000
<b>Estimated Total</b>	<b>\$195.15</b>		<b>\$5,453,510,000</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 - 2023 Economic Impact\***

	Direct	Indirect	Induced	Combined
Industry Output	\$4,837,260,000	\$1,733,860,000	\$1,640,580,000	\$8,211,700,000
Employment (# of jobs)	48,340	8,330	9,830	66,500
Employee Compensation	\$1,511,290,000	\$343,060,000	\$438,940,000	\$2,293,290,000
Proprietor Income	\$173,700,000	\$89,770,000	\$73,610,000	\$337,080,000
Other Property Type Income	\$319,910,000	\$243,940,000	\$325,130,000	\$888,980,000
State & Local Taxes	\$255,830,000	\$83,180,000	\$75,350,000	\$414,360,000

**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 (2022 data) <https://implan.com/data/> for more info.



# 2023 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> 2023
<b>Visitation &amp; Length of Stay</b>					
Nonresident Visitors	1,425,000	3,307,000	5,987,000	1,850,000	12,569,000
% of Total	11%	26%	48%	15%	100%
Nonresident Travel Groups	717,000	1,478,000	2,434,000	963,000	5,592,000
% of Total	13%	26%	44%	17%	100%
Group Size (people per group)	1.99	2.28	2.48	1.93	2.27
Length of Stay (nights)	4.10	4.74	5.69	4.43	5.02
<b>Expenditure Category<sup>2,3</sup> (Avg. Daily per Group)</b>					
	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Year Total <sup>1</sup>
Gasoline, Diesel	\$46.41	\$46.06	\$41.28	\$52.20	\$44.46
Restaurant, Bar	\$40.00	\$32.83	\$35.46	\$26.68	\$34.10
Hotel, Motel	\$48.65	\$30.18	\$24.78	\$20.22	\$27.91
Outfitter, Guide	\$1.29	\$5.18	\$28.00	\$15.78	\$18.19
Groceries, Snacks	\$11.72	\$17.51	\$17.65	\$14.09	\$16.49
Retail sales	\$13.14	\$16.71	\$17.54	\$14.08	\$16.40
Rental cabin, Condo	\$11.80	\$6.05	\$10.10	\$9.01	\$9.19
Auto Rental	\$8.54	\$7.42	\$10.12	\$4.66	\$8.56
Made in MT	\$6.06	\$5.95	\$7.40	\$5.14	\$6.61
Licenses, Entrance Fees	\$4.71	\$5.19	\$4.58	\$5.65	\$4.88
Campground, RV Park	\$0.51	\$3.37	\$4.02	\$1.21	\$3.10
Vehicle Repairs	\$0.25	\$0.53	\$2.09	\$5.95	\$2.08
Misc. Services	\$1.28	\$0.91	\$1.15	\$3.48	\$1.44
Gambling	\$1.80	\$1.50	\$1.17	\$1.60	\$1.37
Farmers Market	\$0.02	\$0.14	\$0.42	\$0.07	\$0.26
Transportation Fares	\$0.03	\$0.02	\$0.17	\$0.04	\$0.10
	<b>\$196.21</b>	<b>\$179.55</b>	<b>\$205.93</b>	<b>\$179.86</b>	<b>\$195.15</b>
<b>Total Expenditures</b>	<b>\$576,660,000</b>	<b>\$1,257,870,000</b>	<b>\$2,852,000,000</b>	<b>\$766,980,000</b>	<b>\$5,453,510,000</b>
<b>% of Total</b>	<b>11%</b>	<b>23%</b>	<b>52%</b>	<b>14%</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 from nonresident travelers intercepted at airports, gas stations, and rest areas in MT. Travelers report 24 hours worth of trip expenditures.



2023

# Montana Nonresident Traveler Expenditure



## Average 2023 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	7,598	3,060	1,421	1,993	767	86	271
Nonresident Travelers	12,569,000	5,066,000	2,344,000	3,306,000	1,269,000	142,000	442,000
Group Size (people/group)	2.27	2.64	2.18	2.05	1.60	2.28	2.21
Length of Stay (nights)	5.02	6.50	6.36	1.09	6.19	2.28	8.87
% of All Travelers in 2023	100%	40%	19%	26%	10%	1%	4%
Gasoline, Diesel	\$44.46	\$41.71	\$31.23	\$62.02	\$39.19	\$22.69	\$36.52
Restaurant, Bar	\$34.10	\$45.05	\$39.72	\$15.46	\$39.61	\$28.52	\$32.23
Hotel, B&B, etc.	\$27.91	\$29.76	\$18.09	\$20.81	\$59.98	\$5.74	\$24.23
Outfitter, Guide	\$18.19	\$40.75	\$2.36	\$0.25	\$2.91	\$1.84	\$2.69
Groceries, Snacks	\$16.49	\$20.43	\$21.68	\$9.73	\$8.45	\$14.04	\$28.02
Retail Sales	\$16.40	\$21.77	\$18.55	\$6.71	\$14.02	\$59.31	\$14.92
Rental Cabin, Condo	\$9.19	\$16.59	\$7.91	\$0.90	\$5.56	\$1.57	\$4.43
Auto Rental	\$8.56	\$12.35	\$8.56	\$0.39	\$14.88	\$0.00	\$11.23
Made in MT	\$6.61	\$8.13	\$9.84	\$2.87	\$6.34	\$8.29	\$2.23
Licenses, Entrance Fees	\$4.88	\$9.52	\$2.54	\$1.07	\$1.95	\$0.18	\$6.61
Campground, RV Park	\$3.10	\$5.14	\$1.02	\$1.88	\$0.49	\$0.00	\$3.13
Auto Repair	\$2.08	\$1.85	\$4.76	\$0.84	\$3.24	\$0.00	\$0.53
Misc. Services	\$1.44	\$1.62	\$2.41	\$0.31	\$1.95	\$12.18	\$2.78
Gambling	\$1.37	\$1.47	\$2.20	\$0.76	\$1.42	\$9.68	\$1.13
Farmers Market	\$0.26	\$0.35	\$0.36	\$0.11	\$0.10	\$0.06	\$0.27
Transportation Fares	\$0.10	\$0.17	\$0.04	\$0.02	\$0.12	\$0.00	\$0.00
<b>Total Avg. Daily per Group</b>	<b>\$195.15</b>	<b>\$256.66</b>	<b>\$171.27</b>	<b>\$124.13</b>	<b>\$200.20</b>	<b>\$164.10</b>	<b>\$170.97</b>

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

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=5,572)	Mean <sup>2</sup> of Those Who Spent	Median <sup>3</sup> of Those Who Spent
Gasoline, Diesel	3,523	63%	\$69.27	\$55.00
Restaurant, Bar	2,525	45%	\$73.78	\$54.00
Hotel, B&B, etc.	1,653	30%	\$183.91	\$160.00
Groceries, Snacks	1,644	30%	\$54.99	\$35.00
Licenses, Entrance Fees	895	16%	\$29.99	\$10.33
Retail Sales	846	15%	\$106.08	\$75.00
Made in MT	745	13%	\$48.17	\$35.00
Campground, RV Park	740	13%	\$49.49	\$41.60
Auto Rental	510	9%	\$90.97	\$89.00
Rental Cabin, Condo	325	6%	\$310.56	\$200.00
Farmers Market	242	4%	\$5.69	\$3.56
Outfitter, Guide	226	4%	\$418.25	\$349.38
Gambling	188	3%	\$40.27	\$40.00
Misc. Services	131	2%	\$58.62	\$55.00
Auto Repair	56	1%	\$193.65	\$118.94
Transportation Fares	25	<1%	\$21.04	\$19.38

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. \*Small sample size, use with caution.



# Quarter 1, 2023

## Montana Nonresident Traveler Expenditure



### 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	757	185	144	261	136	11	20
Nonresident Travelers	1,425,000	348,000	271,000	492,000	255,000	21,000	38,000
Group Size (people/group)	1.99	2.62	1.88	1.77	1.63	1.68	2.39
Length of Stay (nights)	4.10	6.38	5.46	0.83	6.24	0.46	3.41
% of All Travelers in Q1	100%	24%	19%	35%	18%	1%	3%
Hotel, B&B, etc.	\$48.65	\$55.94	\$24.41	\$20.81	\$117.88	\$12.30	\$40.86
Gasoline, Diesel	\$46.41	\$47.73	\$30.68	\$60.23	\$36.16	\$11.05	\$40.32
Restaurant, Bar	\$40.00	\$74.75	\$61.52	\$9.77	\$44.74	\$12.84	\$74.59
Retail Sales	\$13.14	\$17.55	\$19.10	\$4.48	\$11.62	\$42.56	\$63.27
Rental Cabin, Condo	\$11.80	\$32.72	\$6.64	\$1.66	\$12.90	\$0.00	\$7.96
Groceries, Snacks	\$11.72	\$20.90	\$14.92	\$5.42	\$8.72	\$13.32	\$30.52
Auto Rental	\$8.54	\$12.11	\$10.82	\$0.39	\$21.01	\$0.00	\$8.03
Made in MT	\$6.06	\$10.98	\$8.30	\$2.43	\$6.47	\$0.00	\$0.00
Licenses, Entrance Fees	\$4.71	\$20.38	\$2.46	\$0.67	\$0.07	\$0.00	\$0.00
Gambling	\$1.80	\$3.67	\$3.24	\$0.60	\$1.12	\$0.00	\$2.63
Outfitter, Guide	\$1.29	\$3.52	\$3.41	\$0.00	\$0.00	\$0.00	\$0.00
Misc. Services	\$1.28	\$2.71	\$0.83	\$0.06	\$3.12	\$0.00	\$0.00
Campground, RV Park	\$0.51	\$1.81	\$0.00	\$0.36	\$0.00	\$0.00	\$0.00
Auto Repair	\$0.25	\$0.63	\$0.00	\$0.32	\$0.00	\$0.00	\$0.00
Transportation Fares	\$0.03	\$0.07	\$0.03	\$0.02	\$0.00	\$0.00	\$0.00
Farmers Market	\$0.02	\$0.04	\$0.00	\$0.03	\$0.00	\$0.00	\$0.00
<b>Total Avg. Daily per Group</b>	<b>\$196.21</b>	<b>\$305.51</b>	<b>\$186.36</b>	<b>\$107.25</b>	<b>\$263.81</b>	<b>\$92.07</b>	<b>\$268.17</b>

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

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=569)	Mean <sup>2</sup> of Those Who Spent	Median <sup>3</sup> of Those Who Spent
Gasoline, Diesel	364	64%	\$72.52	\$52.96
Restaurant, Bar	272	48%	\$83.74	\$55.20
Hotel, B&B, etc.	163	29%	\$198.93	\$130.00
Groceries, Snacks	139	24%	\$48.11	\$25.00
Made in MT	89	16%	\$38.86	\$32.81
Retail Sales	76	13%	\$98.58	\$61.93
Licenses, Entrance Fees	62	11%	\$43.30	\$30.39
Auto Rental	53	9%	\$91.47	\$88.00
Rental Cabin, Condo	34	6%	\$227.87	\$139.36
Gambling	30	5%	\$34.63	\$40.00
Misc. Services	11	2%	\$64.40	\$86.60
Campground, RV Park	6	1%	\$53.83	\$60.00
Outfitter, Guide	4	1%	\$194.57	\$213.09
Transportation Fares	2	<1%	\$8.06	\$8.06
Auto Repair	1	<1%	\$116.45	\$116.45
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, 2023

## Montana Nonresident Traveler Expenditure



### 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	1,948	821	350	514	180	20	63
Nonresident Travelers	3,307,000	1,394,000	594,000	872,000	306,000	33,000	107,000
Group Size (people/group)	2.28	2.51	2.27	2.18	1.52	2.37	2.16
Length of Stay (nights)	4.74	5.84	6.24	1.01	5.60	0.33	11.36
% of All Travelers in Q2	100%	42%	18%	26%	9%	1%	3%
Gasoline, Diesel	\$46.06	\$43.28	\$34.37	\$63.82	\$38.72	\$7.24	\$33.11
Restaurant, Bar	\$32.83	\$44.65	\$32.52	\$17.18	\$28.74	\$11.12	\$40.73
Hotel, B&B, etc.	\$30.18	\$31.60	\$21.78	\$23.17	\$42.18	\$5.33	\$23.06
Groceries, Snacks	\$17.51	\$20.45	\$27.05	\$9.18	\$9.35	\$14.78	\$25.63
Retail Sales	\$16.71	\$22.63	\$13.85	\$8.21	\$13.61	\$95.36	\$13.07
Auto Rental	\$7.42	\$11.63	\$7.39	\$0.77	\$9.29	\$0.00	\$7.88
Rental Cabin, Condo	\$6.05	\$9.83	\$5.96	\$0.85	\$2.79	\$0.00	\$3.71
Made in MT	\$5.95	\$6.85	\$8.97	\$3.31	\$5.95	\$3.01	\$2.22
Licenses, Entrance Fees	\$5.19	\$9.67	\$2.30	\$1.78	\$3.35	\$0.00	\$0.81
Outfitter, Guide	\$5.18	\$12.13	\$0.00	\$0.56	\$0.00	\$0.00	\$1.55
Campground, RV Park	\$3.37	\$5.53	\$1.42	\$2.04	\$0.40	\$0.00	\$1.28
Gambling	\$1.50	\$1.56	\$1.60	\$0.86	\$3.50	\$0.00	\$0.62
Misc. Services	\$0.91	\$0.76	\$1.00	\$0.21	\$2.85	\$3.35	\$2.07
Auto Repair	\$0.53	\$0.42	\$0.62	\$0.35	\$1.53	\$0.00	\$0.66
Farmers Market	\$0.14	\$0.18	\$0.25	\$0.06	\$0.00	\$0.00	\$0.26
Transportation Fares	\$0.02	\$0.03	\$0.00	\$0.00	\$0.05	\$0.00	\$0.00
<b>Total Avg. Daily per Group</b>	<b>\$179.55</b>	<b>\$221.20</b>	<b>\$159.08</b>	<b>\$132.35</b>	<b>\$162.31</b>	<b>\$140.19</b>	<b>\$156.67</b>

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

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=1,519)	Mean <sup>2</sup> of Those Who Spent	Median <sup>3</sup> of Those Who Spent
Gasoline, Diesel	1,022	67%	\$68.44	\$55.00
Restaurant, Bar	709	47%	\$70.31	\$60.00
Hotel, B&B, etc.	522	34%	\$174.06	\$150.00
Groceries, Snacks	446	29%	\$59.67	\$40.00
Campground, RV Park	245	16%	\$41.42	\$33.90
Retail Sales	220	14%	\$115.33	\$70.00
Licenses, Entrance Fees	211	14%	\$37.31	\$18.50
Made in MT	178	12%	\$50.80	\$40.00
Auto Rental	152	10%	\$73.66	\$80.00
Rental Cabin, Condo	73	5%	\$251.49	\$222.80
Gambling	61	4%	\$37.25	\$40.00
Outfitter, Guide	45	3%	\$175.84	\$160.00
Farmers Market	37	2%	\$5.67	\$5.00
Misc. Services	28	2%	\$48.79	\$45.00
Auto Repair	8	1%	\$99.24	\$118.59
Transportation Fares	6	<1%	\$3.96	\$3.96

<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, 2023

## Montana Nonresident Traveler Expenditure



### 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	3,629	1,707	661	857	252	35	117
Nonresident Travelers	5,987,000	2,816,000	1,090,000	1,415,000	416,000	58,000	193,000
Group Size (people/group)	2.48	2.78	2.27	2.21	1.85	2.48	2.52
Length of Stay (nights)	5.69	6.89	6.73	1.45	7.59	5.69	10.88
% of All Travelers in Q3	100%	47%	18%	24%	7%	1%	3%
Gasoline, Diesel	\$41.28	\$37.56	\$28.12	\$60.62	\$39.36	\$23.41	\$31.58
Restaurant, Bar	\$35.46	\$41.84	\$42.40	\$16.28	\$46.49	\$29.54	\$26.30
Outfitter, Guide	\$28.00	\$55.88	\$3.01	\$0.18	\$7.68	\$1.95	\$4.67
Hotel, B&B, etc.	\$24.78	\$27.12	\$15.73	\$21.02	\$36.00	\$5.69	\$25.34
Groceries, Snacks	\$17.65	\$20.76	\$20.33	\$11.46	\$9.33	\$14.05	\$25.07
Retail Sales	\$17.54	\$21.85	\$18.41	\$7.25	\$17.41	\$58.70	\$15.68
Auto Rental	\$10.12	\$13.75	\$10.83	\$0.24	\$16.35	\$0.00	\$11.78
Rental Cabin, Condo	\$10.10	\$15.50	\$9.25	\$0.95	\$3.32	\$1.67	\$6.14
Made in MT	\$7.40	\$8.50	\$10.31	\$2.97	\$8.05	\$8.65	\$2.39
Licenses, Entrance Fees	\$4.58	\$7.69	\$2.24	\$0.97	\$2.49	\$0.19	\$5.01
Campground, RV Park	\$4.02	\$5.99	\$1.06	\$2.28	\$0.99	\$0.00	\$5.74
Auto Repair	\$2.09	\$2.10	\$3.24	\$1.01	\$3.93	\$0.00	\$0.70
Gambling	\$1.17	\$1.17	\$1.45	\$0.80	\$0.57	\$10.26	\$1.71
Misc. Services	\$1.15	\$1.12	\$1.69	\$0.09	\$1.53	\$12.81	\$3.14
Farmers Market	\$0.42	\$0.52	\$0.59	\$0.15	\$0.26	\$0.06	\$0.39
Transportation Fares	\$0.17	\$0.28	\$0.09	\$0.04	\$0.17	\$0.00	\$0.00
<b>Total Avg. Daily per Group</b>	<b>\$205.93</b>	<b>\$261.63</b>	<b>\$168.75</b>	<b>\$126.31</b>	<b>\$193.92</b>	<b>\$166.97</b>	<b>\$165.64</b>

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

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=2,660)	Mean <sup>2</sup> of Those Who Spent	Median <sup>3</sup> of Those Who Spent
Gasoline, Diesel	1,669	63%	\$65.79	\$54.00
Restaurant, Bar	1,256	47%	\$75.10	\$50.00
Groceries, Snacks	857	32%	\$54.81	\$35.00
Hotel, B&B, etc.	758	28%	\$197.00	\$192.00
Licenses, Entrance Fees	520	20%	\$23.46	\$7.17
Retail Sales	464	17%	\$100.47	\$80.00
Campground, RV Park	440	17%	\$55.03	\$41.60
Made in MT	394	15%	\$49.98	\$30.00
Auto Rental	244	9%	\$110.25	\$119.00
Farmers Market	189	7%	\$5.87	\$3.33
Rental Cabin, Condo	180	7%	\$337.26	\$219.47
Outfitter, Guide	158	6%	\$470.75	\$360.00
Gambling	65	2%	\$48.12	\$48.69
Misc. Services	63	2%	\$48.47	\$50.00
Auto Repair	34	1%	\$165.43	\$130.23
Transportation Fares	13	<1%	\$34.21	\$35.00

<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 4, 2023

## Montana Nonresident Traveler Expenditure



### 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	1,264	347	266	361	199	20	71
Nonresident Travelers	1,850,000	508,000	389,000	528,000	292,000	30,000	104,000
Group Size (people/group)	1.93	2.36	2.05	1.79	1.37	2.29	1.73
Length of Stay (nights)	4.43	6.46	6.29	0.71	5.12	0.21	5.70
% of All Travelers in Q4	100%	27%	21%	29%	16%	2%	6%
Gasoline, Diesel	\$52.20	\$54.61	\$34.81	\$66.48	\$44.22	\$19.89	\$54.46
Restaurant, Bar	\$26.68	\$41.11	\$30.65	\$11.79	\$28.43	\$11.07	\$21.94
Hotel, B&B, etc.	\$20.22	\$21.14	\$15.56	\$13.14	\$40.22	\$2.03	\$18.40
Outfitter, Guide	\$15.78	\$48.17	\$3.22	\$0.00	\$0.32	\$0.00	\$0.00
Groceries, Snacks	\$14.09	\$18.49	\$21.83	\$6.01	\$5.06	\$12.18	\$39.29
Retail Sales	\$14.08	\$22.60	\$24.38	\$1.84	\$10.85	\$39.06	\$2.02
Rental Cabin, Condo	\$9.01	\$23.94	\$7.92	\$0.00	\$1.85	\$0.00	\$0.00
Auto Repair	\$5.95	\$4.19	\$15.94	\$1.72	\$8.83	\$0.00	\$0.00
Licenses, Entrance Fees	\$5.65	\$10.65	\$3.56	\$0.00	\$2.17	\$0.00	\$22.52
Made in MT	\$5.14	\$6.89	\$10.64	\$1.57	\$2.81	\$3.48	\$2.47
Auto Rental	\$4.66	\$7.12	\$3.54	\$0.13	\$8.13	\$0.00	\$16.23
Misc. Services	\$3.48	\$4.93	\$6.66	\$2.04	\$0.00	\$0.00	\$3.80
Gambling	\$1.60	\$1.27	\$4.10	\$0.46	\$1.40	\$0.00	\$0.00
Campground, RV Park	\$1.21	\$2.52	\$0.98	\$0.72	\$0.26	\$0.00	\$0.03
Farmers Market	\$0.07	\$0.07	\$0.15	\$0.06	\$0.00	\$0.00	\$0.02
Transportation Fares	\$0.04	\$0.00	\$0.00	\$0.00	\$0.26	\$0.00	\$0.00
	\$179.86	\$267.70	\$183.93	\$105.96	\$154.82	\$87.71	\$181.18

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

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=823)	Mean <sup>2</sup> of Those Who Spent	Median <sup>3</sup> of Those Who Spent
Gasoline, Diesel	468	57%	\$80.96	\$63.34
Restaurant, Bar	288	35%	\$67.17	\$50.00
Hotel, B&B, etc.	210	26%	\$149.66	\$139.91
Groceries, Snacks	204	25%	\$50.17	\$34.00
Licenses, Entrance Fees	103	13%	\$39.98	\$18.50
Retail Sales	86	10%	\$119.31	\$80.00
Made in MT	85	10%	\$43.94	\$34.24
Auto Rental	60	7%	\$56.17	\$63.37
Campground, RV Park	48	6%	\$39.26	\$35.00
Rental Cabin, Condo	38	5%	\$371.86	\$200.00
Gambling	33	4%	\$35.50	\$40.00
Misc. Services	28	3%	\$88.57	\$119.26
Outfitter, Guide	19	2%	\$594.22	\$616.81
Farmers Market	15	2%	\$3.16	\$1.85
Auto Repair	13	2%	\$333.99	\$92.49
Transportation Fares	4	<1%	\$7.10	\$7.10

<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.

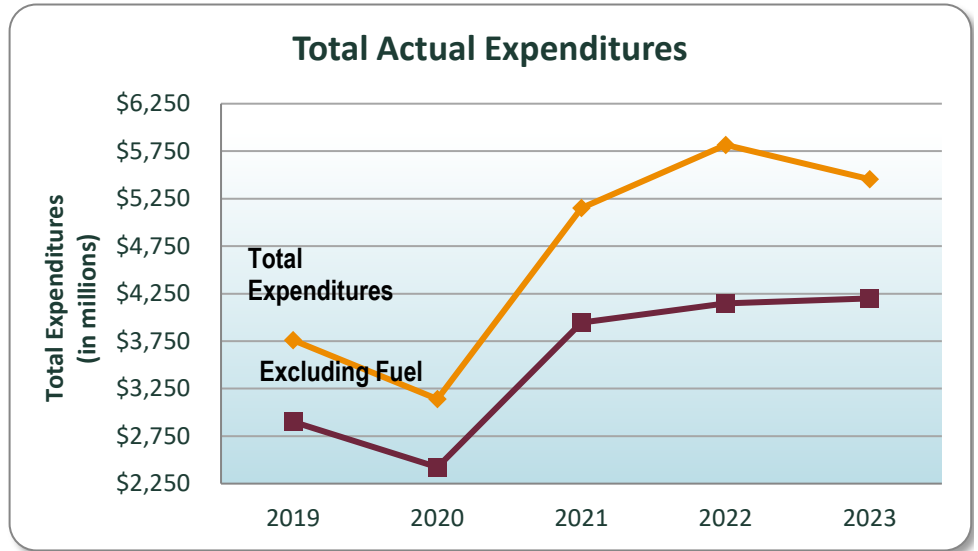
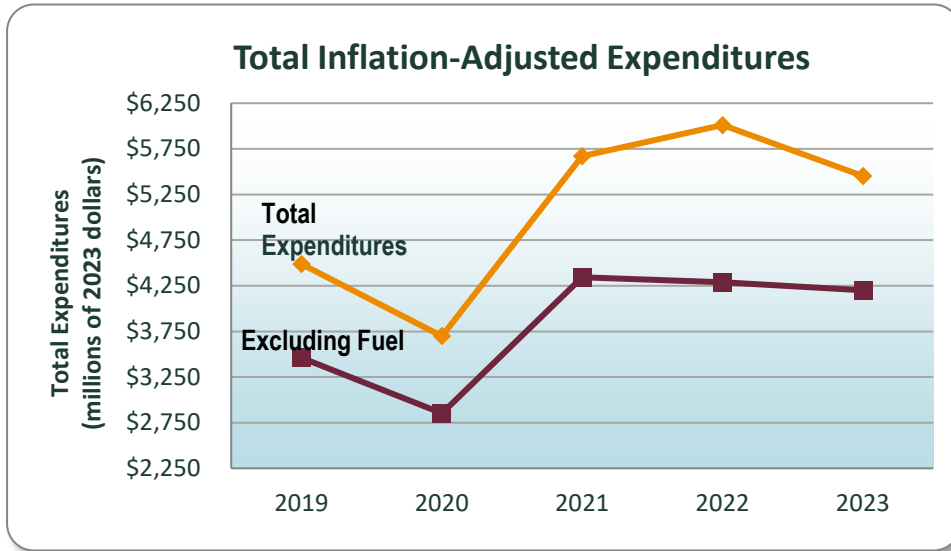
Spending data are gathered from nonresident travelers intercepted at airports, gas stations, and rest areas in MT. Expenditures represent 24 hours worth of travel group spending.

<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.



# 2019-2023 Montana Nonresident Traveler Expenditure Trends

## Overall Total & Excluding Fuel\*

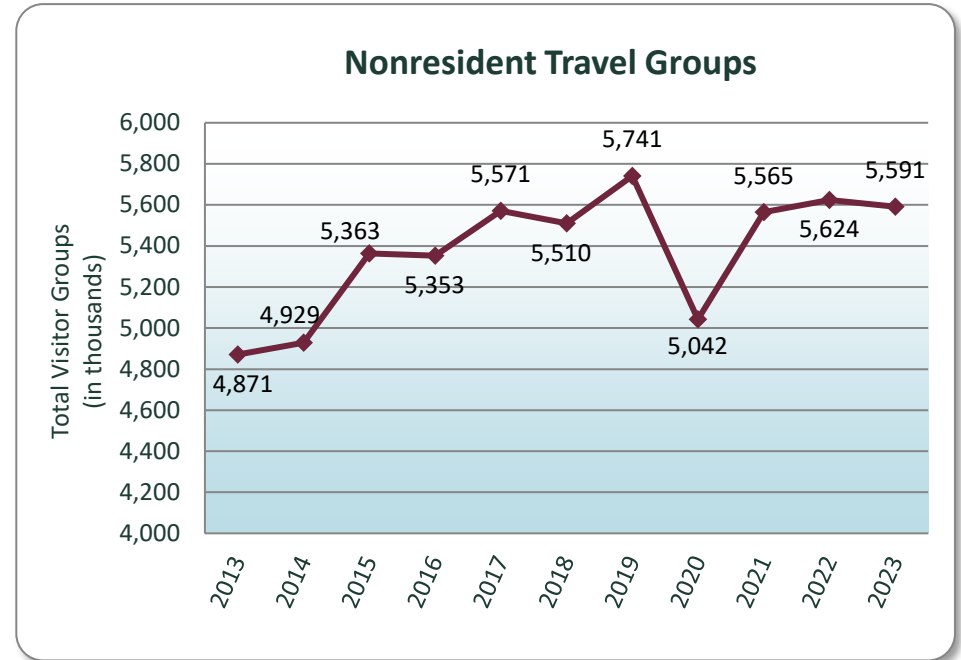
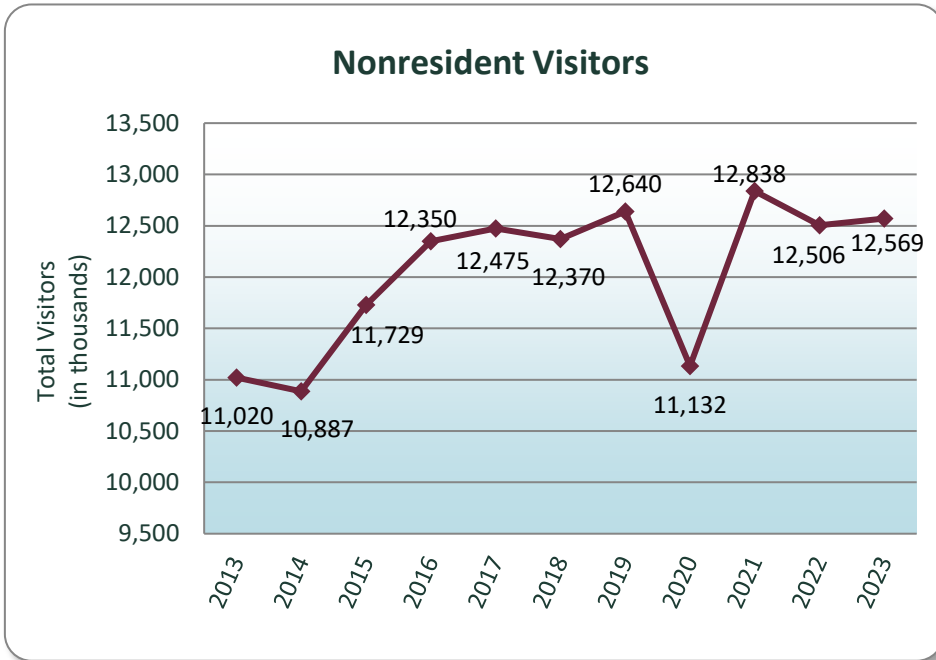


Nonresident Traveler Expenditure Trends	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
<b>Total Inflation-adjusted Expenditures</b> (millions of 2023 dollars <sup>1</sup> )	\$4,734	\$5,095	\$4,193	\$3,857	\$4,187	\$4,547	\$4,489	\$3,698	\$5,668	\$6,011	\$5,454
% Change from Previous Year	8.4%	7.6%	-17.7%	-8.0%	8.6%	8.6%	-1.3%	-17.6%	53.3%	6.1%	-9.3%
<u>Excluding Fuel</u> Expenditures (2023\$)	\$3,237	\$3,476	\$3,250	\$3,049	\$3,230	\$3,522	\$3,462	\$2,853	\$4,343	\$4,287	\$4,200
% Change from Previous Year	16.2%	7.4%	-6.5%	-6.2%	5.9%	9.0%	-1.7%	-17.6%	52.2%	-1.3%	-2.0%
<b>Total Actual Expenditures</b> (in millions)	\$3,624	\$3,900	\$3,233	\$3,036	\$3,365	\$3,724	\$3,761	\$3,140	\$5,152	\$5,816	\$5,454
% Change from Previous Year	10.9%	7.6%	-17.1%	-6.1%	10.8%	10.7%	1.0%	-16.5%	64.1%	12.9%	-6.2%
<u>Excluding Fuel</u> Expenditures	\$2,459	\$2,661	\$2,506	\$2,400	\$2,596	\$2,885	\$2,900	\$2,423	\$3,947	\$4,148	\$4,200
% Change from Previous Year	16.2%	8.2%	-5.8%	-4.2%	8.2%	11.1%	0.5%	-16.4%	62.9%	5.1%	1.3%

\*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. \*2020 expenditures include Q2 estimates based on 2019.



## 2013-2023 Montana Nonresident Traveler Visitation Trends



Nonresident Traveler Visitation Trends	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Nonresident Visitors (in thousands)	11,020	10,887	11,729	12,350	12,475	12,370	12,640	11,132	12,838	12,506	12,569
% Change from Previous Year	2.3%	-1.2%	7.7%	5.3%	1.0%	-0.8%	2.2%	-11.9%	15.3%	-2.6%	0.5%
Nonresident Travel Groups (in thousands <sup>1</sup> )	4,871	4,929	5,363	5,353	5,571	5,510	5,741	5,042	5,565	5,624	5,591
% Change from Previous Year	0.8%	1.2%	8.8%	-0.2%	4.1%	-1.1%	4.2%	-12.2%	10.4%	1.1%	-0.6%
Average people per group	2.24	2.19	2.19	2.31	2.23	2.27	2.18	2.19	2.28	2.23	2.27

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



# 2023 Expenditure Comparison of Overseas, Canadian, and Domestic Nonresident Travelers to Montana



	Overseas Visitors <sup>1</sup>			Canadian Visitors			Domestic Visitors		
Sample size	118			624			6,914		
Nonresident Travelers	195,000			1,023,000			11,351,000		
Group Size (people/group)	2.06			2.30			2.26		
Length of Stay (nights)	7.00			2.49			5.21		
% of All Travelers in 2023	2%			8%			90%		

Expenditure Category <sup>2,3</sup>	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	\$53.24	20%	\$372.88		\$54.11	32%	\$134.72		\$41.70	22%	\$217.26
Restaurant, Bar	\$33.70	13%	\$236.00		\$29.01	17%	\$72.22		\$33.62	18%	\$175.14
Hotel, B&B, etc.	\$25.94	10%	\$181.68		\$22.98	14%	\$57.20		\$26.15	14%	\$136.24
Outfitter, Guide	\$21.17	8%	\$148.25		\$7.43	4%	\$18.50		\$18.26	10%	\$95.13
Retail Sales	\$22.24	8%	\$155.75		\$14.91	9%	\$37.11		\$16.07	9%	\$83.72
Groceries, Snacks	\$48.37	18%	\$338.74		\$20.19	12%	\$50.26		\$15.35	8%	\$80.00
Rental Cabin, Condo	\$18.05	7%	\$126.39		\$3.14	2%	\$7.81		\$8.95	5%	\$46.63
Auto Rental	\$21.46	8%	\$150.28		\$0.00	0%	\$0.00		\$8.87	5%	\$46.23
Made in Montana	\$12.72	5%	\$89.10		\$3.20	2%	\$7.97		\$6.63	4%	\$34.57
Licenses, Entrance Fees	\$6.27	2%	\$43.88		\$5.30	3%	\$13.18		\$4.70	2%	\$24.48
Campground, RV Park	\$3.11	1%	\$21.78		\$4.65	3%	\$11.57		\$2.76	1%	\$14.38
Auto Repair	\$0.00	<1%	\$0.00		\$0.46	<1%	\$1.15		\$2.14	1%	\$11.16
Misc. Services	\$0.00	<1%	\$0.00		\$0.84	<1%	\$2.08		\$1.47	1%	\$7.63
Gambling	\$0.86	<1%	\$6.04		\$1.32	1%	\$3.27		\$1.34	1%	\$7.00
Farmers Market	\$0.37	<1%	\$2.56		\$0.24	<1%	\$0.60		\$0.25	<1%	\$1.30
Transportation Fares	\$0.00	<1%	\$0.00		\$0.00	<1%	\$0.00		\$0.11	<1%	\$0.56
<b>Total Average Daily per Group</b>	<b>\$267.49</b>		<b>\$1,873.32</b>		<b>\$167.75</b>		<b>\$417.63</b>		<b>\$188.38</b>		<b>\$981.45</b>
<b>Total 2023 Expenditures</b>	<b>\$161,408,000</b>				<b>\$200,559,000</b>				<b>\$5,091,547,000</b>		
<b>% of Total</b>	<b>3%</b>				<b>4%</b>				<b>93%</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.



## 2023 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	941	137	414	62	15	165	140
Nonresident Travelers	1,352,000	179,000	607,000	77,000	40,000	259,000	176,000
Group Size (people/group)	2.33	1.88	2.60	1.76	1.66	2.52	2.06
Length of Stay (nights)	7.06	5.54	7.40	8.11	5.46	7.96	6.06
% of All Travelers in 2023	12.2%	1.8%	5.4%	0.8%	0.2%	2.1%	1.8%
Restaurant, Bar	\$64.30	\$41.85	\$73.35	\$41.93	\$62.50	\$65.34	\$67.71
Auto Rental	\$54.26	\$31.74	\$68.48	\$42.99	\$26.11	\$55.57	\$43.48
Hotel, B&B, etc.	\$36.15	\$29.69	\$38.79	\$40.73	\$29.62	\$37.51	\$32.97
Outfitter, Guide	\$31.91	\$0.00	\$39.73	\$13.12	\$41.54	\$33.79	\$36.43
Retail Sales	\$24.10	\$21.35	\$19.09	\$17.12	\$19.14	\$16.45	\$55.78
Gasoline, Diesel	\$20.95	\$13.65	\$28.00	\$16.11	\$10.02	\$14.56	\$17.42
Groceries, Snacks	\$20.88	\$5.87	\$27.72	\$5.88	\$8.76	\$31.29	\$12.12
rental Home, Cabin, Condo	\$20.62	\$9.68	\$23.97	\$7.16	\$8.61	\$16.67	\$35.03
Made in Montana	\$10.57	\$11.44	\$5.83	\$2.53	\$20.92	\$16.59	\$18.80
Licenses, Entrance Fees	\$8.42	\$0.75	\$11.90	\$2.20	\$7.81	\$9.17	\$8.42
Vehicle Repair	\$2.77	\$0.00	\$0.79	\$0.00	\$2.53	\$1.14	\$14.86
Misc. Services	\$1.79	\$1.58	\$0.00	\$1.60	\$0.00	\$3.21	\$6.11
Gambling	\$1.77	\$1.65	\$0.98	\$2.43	\$2.62	\$1.59	\$3.51
Campground, RV Park	\$1.21	\$0.06	\$2.08	\$0.00	\$0.00	\$1.19	\$0.59
Transportation Fares	\$0.41	\$0.18	\$0.32	\$0.00	\$0.18	\$0.56	\$0.94
Farmers Market	\$0.40	\$0.13	\$0.64	\$0.10	\$0.25	\$0.22	\$0.37
<b>Total Avg. Daily per Group</b>	<b>\$300.49</b>	<b>\$169.63</b>	<b>\$341.66</b>	<b>\$193.89</b>	<b>\$240.60</b>	<b>\$304.85</b>	<b>\$354.54</b>
<b>Estimate of Statewide Spending</b>	<b>\$1,482,860,000</b>	<b>\$94,980,000</b>	<b>\$769,440,000</b>	<b>\$72,100,000</b>	<b>\$14,680,000</b>	<b>\$294,980,000</b>	<b>\$221,400,000</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.