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An Economic Impact Assessment of the American Bowling Congress Tournament in Billings, 2002

Thale Dillon

The University of Montana-Missoula

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ABC—Billings 2002

An Economic Impact Assessment of the
American Bowling Congress Tournament
in Billings, 2002

By

Thale Dillon

Research Report 2002-11

October 2002

Institute for Tourism and Recreation Research

School of Forestry

The University of Montana

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Introduction

The American Bowling Congress (ABC) was founded in September 1895 in New York City. The first ABC Tournament was held in Chicago in 1901 with 41 teams competing. Since then, ABC has visited 47 different U.S. cities and will celebrate its 100th tournament in Knoxville, Tennessee in 2003.

In 1996, Billings successfully bid to be the host of the 99th tournament in 2002. The success of the bid was aided by a \$120,000¹ contribution from state bed tax funds which in turn gave the state as a whole a vested interest in how this large event would affect the Montana economy.

To answer the underlying question of whether or not the economic benefit resulting from the ABC Tournament in Billings would impact the state as a whole or be limited to the City of Billings and Yellowstone County, the Institute for Tourism and Recreation Research at the University of Montana conducted an economic impact study of the event.

This report provides a description of the survey findings as well as the methodology employed in this study. Findings discussed in this report include geographic residences of participants, group size and average length of stay, type of accommodations used, mode of transportation used in travel to Billings, parts of Montana visited outside Billings, and participants' spending patterns. It also provides an account of the ABC Tournament's economic impact on Yellowstone County and an assessment of the impact on areas beyond the host city.

Funding for this research came from the Lodging Facility Use Tax. Copies of this report can be downloaded from ITRR's web site (www.forestrv.umt.edu/itr) at no charge.

Acknowledgements

This study would not have been possible without the help and cooperation of several people. First and foremost, the author would like to thank our tireless interviewer, Charlie Beene of Billings, who during the course of the tournament talked to over 900 people. Without his patience and tireless wit, our response rate would never have been this good. Also, thanks go to Jill Sanderson of ITRR. Without her technical expertise concerning the use of hand-held computers and surveying software, we would have been lost. Finally, the author would like to thank Brian Lewis, tournament director for the American Bowling Congress, for graciously allowing us to conduct our survey at Metra Park at our convenience throughout the duration of the tournament. We truly appreciate your help—thank you!

¹ Travel Montana contributed \$30,000 per year for 4 years, starting in 1999.

Methodology of the ABC Economic Impact Study

The 2002 American Bowling Congress was held in Billings, MT, at Metra Park, a convention facility adjacent to the county fairgrounds. The tournament opened February 9 and closed June 22, for a duration of approximately four and a half months. During this time, 53,975 registered bowlers came to Billings from all over the U.S. as well as from abroad. The survey population was defined as those people coming to Billings either to participate in the tournament or accompanying someone who did. The population was intercepted at Billing's Metra Park facility at random times on random days during the duration of the tournament. All weekdays and all times of day were represented².

To ensure a close match between the survey sample and the actual visitor population, the sample was weighted by respondents' residence as this was the only piece of information collected consistently from both groups.

Data was obtained through on-site interviews conducted using a Palm Pilot (hand-held computer). From a total of 903 intercepts, 858 surveys were completed, yielding a response rate of 95 percent. Billings residents were excluded from the study as they do not represent an outside impact to the Billings/Yellowstone County economy (Table 1).

The questionnaire used was based on one developed by the University of Utah's Bureau of Economic and Business Research. They routinely conduct economic impact studies at Salt Lake City's largest convention facility and conducted a similar study of the ABC Tournament in 1996. The ITRR questionnaire was based on updated versions of this instrument which BEBR currently uses, thus a field test was deemed unnecessary. For a written copy of the survey questions, please see Appendix A.

Throughout this report, people visiting Billings in connection with the ABC Tournament will be denoted as indicated below.

- Participants: Refers to registered bowlers only
- Companions: Refers to visitors to Billings who are accompanying registered bowlers
- Attendees: Refers to the combination of the two above categories.

Table 1. Tournament Attendance and Sample Size

Attendance	66,925
Intercepts	903
Refusals	45
Refusal Rate	5%
Interviews	858
Response Rate	95%

² The sampled days included all days and all times of day when bowling activity was scheduled. The surveyor was not present during those times when no bowlers were in attendance (i.e. between scheduled games).

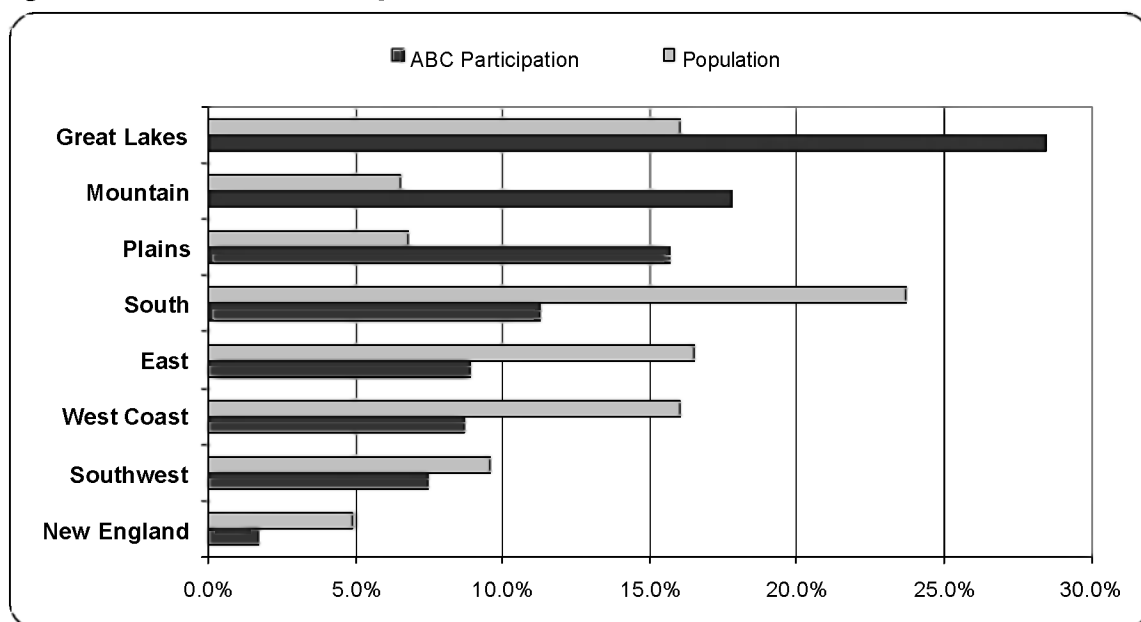
Section 1: Bowler Characteristics

A. Residence of Participants

The ABC Tournament in Billings attracted participants with residences broadly distributed throughout the United States, however, concentrations were observed in certain regions (for details on the regional division of states, please see Appendix B). The Great Lakes Region, the Mountain Region and the Plains Region were all represented in higher numbers than what their resident population sizes would indicate. Participants from the Great Lakes Region constituted the largest portion of tournament attendees with 28.5 percent of the total. In contrast, this region is home to only 16 percent of the U.S. population. The Mountain Region contributed 17.8 percent of the attendee total, yet only 6.5 percent of the country's population is from that area. This high participation rate on the part of the Mountain states is consistent with past ABC Tournaments held in the Mountain states. Attendees from the Plains Region made up 15.7 percent of the visitor total, yet is home to only 6.8 percent of the U.S. population.

The opposite holds true for the remaining regions. The South contributed 11.2 percent of total bowlers but is home to a full 23.7 percent of the U.S. population. Attendees from the East constituted 8.9 percent of the total but is home to 16.5 percent of Americans. The West Coast, while holding 16 percent of the country's population, was home to only 8.7 percent of participants. The Southwest and New England contributed 7.5 and 1.7 percent of bowlers, respectively, while the former holds 9.6 percent and the latter 4.9 percent of the U.S. population (Figure 1).

Figure 1. Residence of Participants



The state that sent the most tournament participants was Illinois with 7.1 percent, or 765 teams. With 5 bowlers to a team, Illinois contributed 3,825 bowlers to the tournament. Following Illinois was Michigan with 6.9 percent (744 teams/3,720 bowlers) and Ohio with 5.9 percent (632 teams/3,160 bowlers). Other origins included Puerto Rico (2 teams), Bermuda (8 teams), the Grand Bahamas (2 teams), Switzerland (2 teams), and Canada (59 teams).

Table 2. State/Country of Residence of Interviewed Attendees (those with two or more interviews)

State or Country	Frequency	Percent of Participants
Illinois	65	7.1
Michigan	62	6.8
Ohio	54	5.9
Texas	54	5.9
Montana	50	5.5
Wisconsin	44	4.9
California	42	4.6
Colorado	36	4.0
Pennsylvania	33	3.6
Indiana	32	3.5
Minnesota	31	3.3
Florida	27	3.0
Iowa	27	3.0
Washington	22	2.4
Kansas	21	2.3
Arizona	20	2.2
Missouri	19	2.1
New York	18	2.0
Nebraska	17	1.9
New Jersey	16	1.7
North Dakota	16	1.7
Virginia	15	1.7
Idaho	14	1.6
Utah	14	1.6
Wyoming	14	1.6
Georgia	13	1.5
Oregon	12	1.4
South Dakota	12	1.4
Maryland	11	1.2
Oklahoma	11	1.2
Alabama	9	1.0
Nevada	9	1.0
North Carolina	8	0.9
Connecticut	7	0.8
Louisiana	7	0.8
Kentucky	6	0.7
New Mexico	6	0.7
Massachusetts	5	0.6
Arkansas	4	0.4
West Virginia	4	0.4
Mississippi	3	0.4
South Carolina	3	0.4
Alaska	2	0.2
Canada	2	0.2
Delaware	2	0.2
New Hampshire	2	0.2
Other states or countries	3	0.4

B. Group Size and Length of Stay

While reported group sizes for tournament attendees ranged from 1 to 20 people, the mean group size was 3.73, indicating that bowlers do not necessarily travel as a team. The number of registered bowlers as part of these groups ranged from 0 to 16, with the mean number of registered bowlers per group being 3.02.

This indicates that the average group contained 0.71 companions, or alternately, that each bowler brought 0.24 non-bowlers on their trip to Billings. The 53,975 attending bowlers brought approximately 12,950 non-bowlers for a total visiting population of 66,925.

The ABC public relations department states that attendants at their tournaments stay in the host community for approximately 4 days. This is consistent with length-of-stay findings from this study. With length of stay in Billings ranging from 1 to 18 nights, the average stay was 3.34 nights (Tables 3 and 4).

Table 3. Visitation Characteristics

Characteristic	Portion
Average group size	3.73
Average number of bowlers per group	3.02
Average number of companions per group	0.71
Average number of companions per bowler	0.24
Total visiting population	66,925
Total number of bowlers	53,975
Total number of non-bowling companions	12,950
Total number of visiting groups	17,942
Length of stay	3.34 nights

Table 4. Reported Length of Stay in Billings

Number of Nights	Frequency	Percent
1	17	1.9
2	142	15.5
3	322	35.3
4	273	29.9
5	96	10.5
6	32	3.5
7	13	1.5
8	4	0.4
9	2	0.2
10	3	0.3
18	9	1.0

C. Type of Overnight Accommodations

The overwhelming majority (94%) of tournament attendees chose to stay in a hotel or motel while in Billings. Two percent stayed with friends or relatives, while the remainder stayed in RVs (2%), at a campground (1%), or in a rented condo or cabin (1%) (Table 5).

Table 5. Type of Overnight Accommodations

Type of Accommodation	Percent
Hotel/Motel/B&B	94%
Home of friends/relatives	2%
RV	2%
Campground	1%
Rented condo/cabin	1%

D. Previous and Future Visits to Montana

Of the tournament attendees intercepted for this study, 6 percent were Montana residents from places other than Billings³. Of the non-Montana participants, 33 percent had been to Montana in the past, some as many as 20 times, and 45 percent expected to visit Montana again within the next 5 years.

Of those with frequent previous visits, the majority was from Montana's immediate neighboring states. However, those who expect to visit again within the next 5 years came from the entire country. The mean number of previous visits was 3.67 (Tables 6 and 7).

Table 6. Previous and Future Visits to Montana

Characteristic	Portion
Total population	66,925
<i>Montana residents</i>	6%
<i>Non-Montana residents</i>	94%
Nonresident Attendees	62,910
<i>Have visited before</i>	33%
<i>Have not visited before</i>	67%
 <i>Expect to visit again within next 5 years</i>	45%
 <i>Expect to not visit again within next 5 years</i>	55%

³ Billings residents were excluded from this study because they do not constitute an outside economic impact to the county in which they reside.

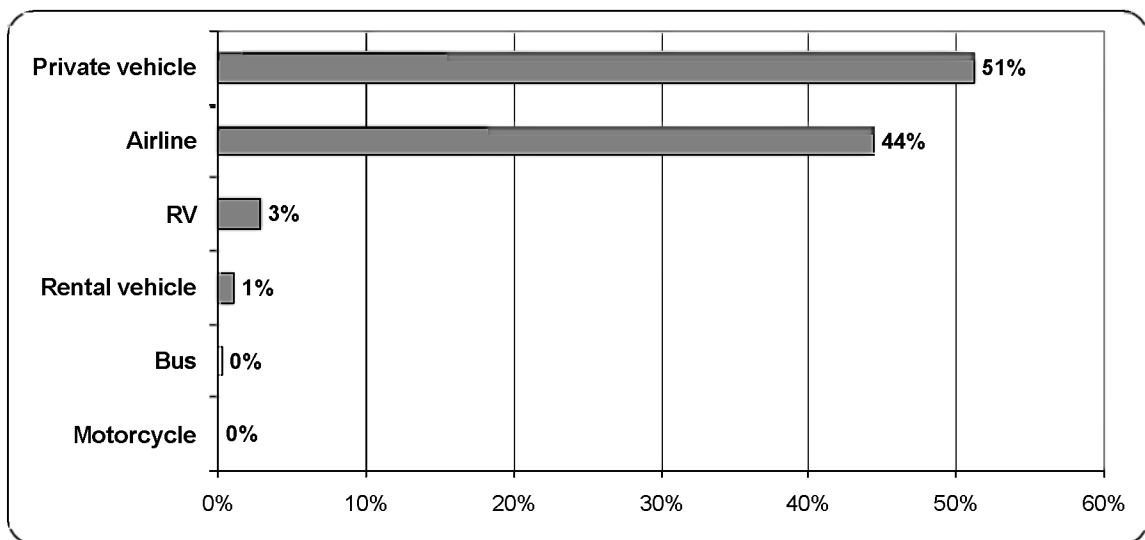
Table 7. Number of Previous Visits

Number of Previous Visits	Percent
1 visit	51%
2 visits	19%
3 visits	6%
4 visits	3%
5 visits	7%
6 visits	1%
7 visits	<1%
8 visits	1%
9 visits	--
10 visits	6%
11 visits	<1%
13 visits	<1%
15 visits	<1%
20 visits	2%
25 visits	3%
Mean visits	3.67

E. Mode of Transportation

Montana's neighboring states were home to a large portion of the ABC Tournament's participants and this is reflected in the number of attendees choosing to travel by automobile. Slightly over half (51%) of attendees arrived in Billings by private vehicle. An additional one percent came in a rental vehicle, while 44 percent came by air. Three percent arrived in Billings by RV, while less than one percent came by bus or motorcycle (Figure 2).

Figure 2. Mode of Transportation



Of those who arrived in Montana by air, 98 percent flew directly to Billings while 2 percent flew into Bozeman. A total of 37 percent of all attendees chose to rent a vehicle for any portion of their trip (either going to or from Billings, or in Billings itself). Eighty percent of those who flew into Montana chose to rent a vehicle. Of all cars rented by ABC participants, 96 percent were rented in Montana (Table 8).

Table 8. Car Rental Characteristic

Characteristic	Portion
Total Population	66,925
<i>Rented car</i>	37%
<i>Did not rent car</i>	63%
Air passenger Population	29,447
<i>Rented car</i>	80%
<i>Did not rent car</i>	20%
Car Rental Population	24,762
<i>Rented in Montana</i>	96%
<i>Not rented in Montana</i>	4%

Section 2: Travel Outside of Billings

As mentioned in the introduction, one of the underlying purposes of this study was to determine if the economic impact resulting from the ABC Tournament in Billings would benefit the entire state or be limited to just Yellowstone County. To that end, nonresident tournament attendees were asked whether or not they planned to travel outside of Billings and Yellowstone Country while in Montana, and if so, which of Montana’s six travel regions they would visit (for a breakdown of travel regions, please see Appendix C).

Most visitors to Montana, and even many residents, are unaware that the state is divided into six tourism regions, and as such, are unable to identify which region they have visited or intend to visit. To avoid the problem of inaccurate reporting, survey respondents were shown a map of Montana. Using this map, they indicated to the surveyor where they had been or where they intended to go and they surveyor then entered the corresponding region(s) into the survey instrument.

Fourteen percent of nonresident tournament attendees, or 8,807 people, indicated that they had or intended to travel outside of Billings while in Montana, while 86 percent (54,103 people) indicated they would visit only Billings. Those who indicated further Montana travel plans were also asked what travel regions they planned to visit. Fifty-eight percent (5,108 people) indicated that Yellowstone Country was their destination outside of Billings, while 46 percent (4,051 people) reported Gold West Country to be their destination. Ten percent (881 people) had Glacier Country as their destination, 5 percent (440 people) visited Custer Country (beyond Billings), 1 percent (88 people) visited Missouri River Country, while no one reported any intentions of visiting Russell Country (Table 9).

Table 9. Travel Outside Billings

Characteristic	Portion	Number of Travelers
Total Nonresident Population		62,910
Travel outside Billings while in Montana		
Yes	14%	8,807
No	86%	54,103
Travel destinations within Montana*		
Yellowstone Country	58%	5,108
Gold West Country	46%	4,051
Glacier Country	10%	881
Custer Country	5%	440
Missouri River Country	1%	88
Russell Country	--	0

* Applies only to the 14 percent of nonresidents who indicated they would travel outside of Billings, approximately 8,807 people. Respondents could visit more than one region.

Section 3: Daily Expenditures and Economic Impacts to Yellowstone County

Daily Expenditures

The average daily expenditure per group for ABC Tournament attendees was considerably higher than the average for regular visitors to Montana. At \$392.38 per group per day, it is almost four times the statewide annual average⁴. However, with a group size of 3.73, the number of people contributing to that spending was larger than for regular visitor groups as these range from 1.97 to 2.5 for the period in question.

As a point of comparison, when considering the expenditures estimated by Salt Lake City's Bureau of Economic and Business Research, expenditures in Billings in 2002 amounted to approximately two-thirds of bowlers' expenditures at the tournament in Salt Lake City in 1996⁵, even though length of stay was found to be shorter there (2.8 in SLC versus 3.34 in Billings).

The most money by far was spent in the hotel/motel category. Average expenditure per group per day on commercial lodging amounted to \$129.17. Second came expenditures on restaurant/bar, amounting to \$93.91, followed by retail at \$77.15, groceries at \$24.54 and gambling at \$23.58. Total daily expenditures averaged \$329.38 per day (Table 10).

Table 10. Estimated Daily Expenditures per group per day

Expenditure Category	Amount
Hotel/motel	\$129.17
Restaurant/bar	\$93.91
Retail	\$77.15
Groceries/snacks	\$24.54
Gambling	\$23.58
Rental car	\$17.79
Recreation	\$16.58
Gasoline/oil	\$9.17
Local transportation	\$0.49
Total per group per day	\$392.38

One important reason for the difference in spending patterns between the average Montana visitor and ABC Tournament attendees is the large amount of money spent on accommodations due to ninety-four percent of ABC attendees spending their nights in a hotel or motel. For the average summer visitor population, that number is 46 percent. This contributes significantly to the higher average spending on accommodations. It would also be natural to assume that those attendees traveling as a team would be less likely to bunk as intimately as would an average traveling family, indicating that each travel group would not only use hotel/motel rooms at a higher rate, but also use more rooms per group.

⁴ For further information on the average Montana visitor, please see ITRR's research reports 2001-7, 2002-2, and 2002-5. All are available at www.forestry.umt.edu/itr and can be downloaded free of charge.

⁵ Expenditures reported for the 1996 Salt Lake City tournament were per person rather per group. Adjusting for this fact, Billings attendees spent an estimated \$105.20 per day while Salt Lake City attendees spent \$149.34 (adjusted for inflation). Additionally, a significant portion of Salt Lake City expenditures is taxable under state and city law. The state of Utah has a 6.6 percent sales tax levied on hotel rooms, food and beverages, retail purchases, rental cars, etc. Salt Lake City itself also levies additional taxes on some of these items. The effective tax rate for hotel rooms is 11.17 percent, while restaurant meals and alcohol sold by the drink are taxed at 7.6 percent and car rentals are taxed at 16.1 percent. These taxes are included in the expenditures reported in the Salt Lake City study. 1996 expenditures were also adjusted for inflation.

The fact that most ABC attendees spent their nights in a hotel or motel has further repercussions for their food budget. Unable to cook their own meals, as campers might do, or eat at the home of a friend or relative, as the average visitor may do, they ended up spending close to one-fourth of their daily expenditures in restaurants and bars.

Another noticeable difference is the low amount spent on gasoline by ABC attendees, less than half of that spent by average Montana visitors, primarily because the former were not traveling very far outside Billings.

Economic Impact for Yellowstone County

ABC Tournament attendees numbered 66,925 people between February 9 and June 22. These visitors to Billings spent approximately \$23,525,000 in the Yellowstone County economy. While this is an impressive number, further analysis reveals that a relatively small portion of this remained in the county economy. One major reason for this leakage is the fact that much of the retail dollar that was spent in Billings was spent on goods that were not made in Montana. In fact, a large share (35%) was spent on ABC souvenirs, clothing and sporting goods⁶, all of which was brought to Billings by ABC and sold in stores at Metra Park by ABC employees.

Another reason for the various leakages is the small unit of analysis that a county provides. Counties, and even states, are rarely if ever economically self-sufficient, meaning that much of the inputs required to provide travelers with what they need and want have to be imported, either from somewhere else in the state or from elsewhere in the country. This type of import leakage becomes especially prominent at the county level, but is reduced as the area of analysis becomes increasingly self-sufficient, as is the case with larger areas such as states or regions.

The expenditures by ABC Tournament attendees exceeded \$23.5 million. Following analysis using an input/output model tailored to Yellowstone County and to this event, estimates show that these expenditures added approximately \$16 million to industry output in Yellowstone County. Of that, value added⁷ approached \$8.2 million. The money spent by tournament attendees helped support the equivalent of 305 jobs⁸, and generated over \$5.2 million in personal income for county residents (Table 11).

Table 11. Estimated Economic Impact on Yellowstone County

Economic Impact on Yellowstone County	Direct Impact	Indirect Impact
Estimated Total Expenditures	\$23,525,000	--
Impact on Industry Output	\$15,999,000	\$2,410,000
Impact on Value Added	\$8,198,000	\$1,363,000
Impact on Personal Income	\$5,213,000	\$893,000
<i>Employee Compensation</i>	\$4,736,000	\$685,000
<i>Proprietor's Income</i>	\$477,000	\$208,000
Impact on Employment	305	35

⁶ Most notably, many of the tournament participants were forced to purchase new bowling balls once in Billings because some airlines would not allow bowling balls as carry-on luggage and some participants were unwilling to bring their balls as checked luggage.

⁷ The term "value added" refers to the value of total revenues minus total input costs.

⁸ Includes both full-time and part-time jobs.

Section 4: Daily Expenditures and Economic Impacts to Montana⁹

Daily Expenditures

Because tournament attendees were intercepted and interviewed in Billings, usually before they had a chance to travel the rest of the state, it was impossible to obtain accurate expenditure data for the portion of attendees' trips outside of Billings. An estimate of daily expenditures for this group of visitors was generated based on previously collected nonresident travel data and the expenditure and behavioral profiles generated for the sub-group of attendees who traveled the state¹⁰. Those just passing through the state on their way to and from Billings were not included in this estimate. Rather, the estimate was calculated for the group of people who extended their trip specifically to spend extra time in Montana outside of Yellowstone County.

As stated in Section 2, fourteen percent of nonresident tournament attendees chose to travel outside of Billings during their visit to Montana. This amounted to 8,807 people, or 2,538 travel groups. At 3.47, group size was slightly smaller for this sub-group than for the population as a whole. ITRR estimates indicate that this group spent \$233.81 per day outside of Billings and that they spent an average of 3.67 nights in the state in addition to the time spent in Billings. The largest portion of this group traveled in their own vehicle while only sixteen percent reported to have rented a car.

Economic Impact to Montana

While traveling in Montana outside Yellowstone County, tournament attendees spent an estimated \$2,178,000. The counties of Russell Country¹¹ are excluded from this analysis because none of the tournament attendees interviewed indicated any intentions of visiting this region. Likewise, Yellowstone County is also excluded as this part of the analysis is concerned with the impact of the tournament outside the host community.

Expenditures by ABC Tournament attendees outside Yellowstone County exceeded \$2 million. Using an input/output model specific to the counties involved and the expenditure patterns of these travelers, the impact on industry output was estimated at \$1.39 million. Total value added reached \$688,000. Total employment supported by these expenditures amounted to 25 jobs. It is unlikely this represents 25 full-time, year-round jobs. Rather, these expenditures helped keep 25 people around the state employed longer, or gave them part-time or full-time work for a period of time.

⁹ This section deals with all of Montana, except Yellowstone County and Russell Country.

¹⁰ This estimate takes into account the more frugal spending patterns of those traveling outside Billings as compared to all the attendees, as well as their travel habits as they differed from those of the average nonresident visitor to Montana.

¹¹ Russell Country includes the following counties: Blaine, Cascade, Chouteau, Fergus, Hill, Judith Basin, Liberty, Meagher, Petroleum, Pondera, Teton, Toole and Wheatland.

In terms of personal income impact, the statewide expenditures contributed a total of \$425,700 in salaries and wages, of which \$389,800 was employees' compensation and \$35,900 was proprietors' income. As a result of these impacts, an additional \$241,400 was generated in state and local taxes.

Table 12: Estimated Economic Impact to Montana

Economic Impact to Montana	Direct Impact	Indirect Impact
Estimated Total Expenditures	\$2,178,000	--
Impact on Industry Output	\$1,393,000	\$223,000
Impact on Value Added	\$688,000	\$129,000
Impact on Personal Income	\$425,700	\$78,800
<i>Employee Compensation</i>	\$389,800	\$59,200
<i>Proprietor's Income</i>	\$35,900	\$19,600
Impact on Employment	25	3
Impact on State and Local Taxes		\$241,400

Section 5: Conclusion

Based on the estimates presented in this report, one can conclude the funds expended to attract the ABC Tournament to Billings in 2002 gave a considerable return, both to the City of Billings and to the state as a whole. A modest investment of public funds helped in securing the event, in turn benefiting the travel industry of the state. Unfortunately, beyond Billings, this economic boon was fairly diluted, to the point that individual operators in the regions visited by tournament attendees were all but unaware of its existence.

Records of bed tax collections for Billings and for Yellowstone County for the period in question (Appendix D) indicate that Travel Montana did not lose any money on this endeavor. Not only did increased bed tax collections make up for the \$120,000 investment, the state as a whole saw a modest economic benefit.

At the local level, contributions to the complete bid package totaled about \$300,000 and total economic impact on local industry output exceeded \$16 million. Obviously, the tournament paid off for those involved locally. It is unknown if the State of Wyoming and the City of Cody, WY, who each contributed \$40,000 to the bid, saw an equally satisfying return on their investment.

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Appendix A: Survey Script

Survey Script

1. I'm from the University of Montana. We're conducting a survey on the economic impact from the American Bowling Congress. May I ask you some questions regarding your trip to Billings?
 - yes, continue
 - no, end interview
2. How many nights have you spent in Billings since you arrived?
 - if 0, end survey
 - if any other number, continue
3. How many more nights will you be in Billings?
4. In what state is your primary residence?
5. How did you get to Billings?
 - airline, skip to 5a
 - private vehicle, skip to 7
 - rented vehicle, skip to 5c
 - motorcycle, skip to 7
 - bus, skip to 7
 - RV, skip to 7
 - train, skip to 7
 - other, skip to 7
 - 5a. Did you fly into Montana?
 - yes, skip to 5b
 - no, skip to 6
 - 5b. Into what Montana city did you fly?
 - Billings, skip to 6
 - Bozeman, skip to 6
 - Butte, skip to 6
 - Great Falls, skip to 6
 - Helena, skip to 6
 - Kalispell, skip to 6
 - Missoula, skip to 6
 - West Yellowstone, skip to 6
 - other, skip to 7
 - 5c. Did you rent the vehicle in Montana?
 - yes, skip to 6a
 - no, skip to 7
6. Did you rent a car?
 - yes, skip to 6a
 - no, skip to 7
 - 6a. What is the daily rate?
7. How many people are in your travel group?
8. How many of those people are registered bowlers?
9. What type of accommodations are you staying in?
 - Hotel, motel or B&B
 - Rented Condo
 - Home of family or friends
 - Campground
 - RV

- Vehicle in parking area
- Other

10. Will you be spending additional nights in Montana outside of Billings?

- yes, skip to 10a
- no, skip to 11
- if MT resident, skip to 11

10a. Where in Montana, other than Billings, will you be spending the night?

- Region 1 (Custer Country)
- Region 2 (Yellowstone Country)
- Region 3 (Gold West Country)
- Region 4 (Glacier Country)
- Region 5 (Russell Country)
- Region 6 (Missouri River Country)

11. Yesterday, how much did your personal travel group spend on:

11a. Accommodation expenses (daily room rate)?

11b. Meals?

11c. Groceries and snacks?

11d. Gambling?

11e. Bus or taxi cab?

11f. Gasoline?

12. Yesterday did anyone in your personal travel group do any shopping?

- yes, skip to 12a
- no, skip to 13

12a. What did you/they buy?

12b. How much did you/ they spend?

12c. Did you buy anything else?

-yes, skip to 12d

-no, skip to 13

12d. What else did you/they buy?

12e. How much did you/they spend?

12f. Did you buy anything else?

-yes, skip to 12g.

-no, skip to 13

12g. What did you buy?

12h. How much did you spend?

13. Yesterday, did you spend any money on entertainment or recreation?

-yes, skip to 13a

-no, skip to 14

13a. What did you do?

13b. How much did you spend?

13c. Any other recreation or entertainment yesterday?

-yes, skip to 13d

-no, skip to 14

13d. What did you do?

13e. How much did you spend?

14. Have you ever been to Montana before this trip?

-yes, skip to 14a

-no, skip to 15

-if MT resident, end interview


14a. How many times?

15. Do you expect to visit Montana again in the next 5 years?

-yes

-no

Thank you for your time.



Appendix B: Regional Division of States

Regional Division of States:

Mountain States: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming

West Coast: Alaska, California, Hawaii, Oregon, Washington

Plains: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota

Southwest: Arkansas, Oklahoma, Texas

South: Alabama, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee, Virginia, West Virginia

Great Lakes: Illinois, Indiana, Michigan, Ohio, Wisconsin

East: Delaware, District of Columbia, Maryland, New Jersey, New York, Pennsylvania

New England: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont



Appendix C: Breakdown of Montana's Tourism Regions

Breakdown of Montana's Tourism Regions

Custer Country:	Big Horn, Carter, Custer, Dawson, Fallon, Golden Valley, Mussellshell, Powder River, Prairie, Rosebud, Treasure, Wibaux and Yellowstone counties.
Glacier Country:	Flathead, Glacier, Lake, Lincoln, Mineral, Missoula, Ravalli and Sanders counties
Gold West Country:	Beaverhead, Broadwater, Deer Lodge, Granite, Jefferson, Lewis & Clark, Madison, Powell and Silver Bow counties.
Missouri River Country:	Daniels, Garfield, McCone, Phillips, Richland, Roosevelt, Sheridan and Valley counties.
Russell Country:	Blaine, Cascade, Chouteau, Fergus, Hill, Judith Basin, Liberty, Meagher, Petroleum, Pondera, Teton, Toole and Wheatland counties.
Yellowstone Country:	Carbon, Gallatin, Park, Stillwater and Sweet Grass counties.



Appendix D: Bed Tax Collections for Billings and Yellowstone County

Bed Tax Collections for Billings and Yellowstone County

Yellowstone County	2001	2002	Percent Change
1 st Quarter (1/1-3/31)	\$318,434	\$385,537	+21%
2 nd Quarter (4/1-6/30)	\$439,592	\$637,177	+45%

Billings			
1 st Quarter (1/1-3/31)	\$311,373	\$377,934	+21%
2 nd Quarter (4/1-6/30)	\$418,441	\$604,476	+44%

Source: Travel Montana