

University of Montana

ScholarWorks at University of Montana

Institute for Tourism and Recreation Research
Publications

Institute for Tourism and Recreation Research

7-1-2014

2013 Nonresident Visitation, Expenditures & Economic Impact Estimates: Estimates by full year, quarters, trip purposes & international visitors

Kara Grau
The University of Montana-Missoula

Follow this and additional works at: https://scholarworks.umt.edu/itrr_pubs



Part of the [Leisure Studies Commons](#), and the [Tourism and Travel Commons](#)

Let us know how access to this document benefits you.

Recommended Citation

Grau, Kara, "2013 Nonresident Visitation, Expenditures & Economic Impact Estimates: Estimates by full year, quarters, trip purposes & international visitors" (2014). *Institute for Tourism and Recreation Research Publications*. 300.
https://scholarworks.umt.edu/itrr_pubs/300

This Report is brought to you for free and open access by the Institute for Tourism and Recreation Research at ScholarWorks at University of Montana. It has been accepted for inclusion in Institute for Tourism and Recreation Research Publications by an authorized administrator of ScholarWorks at University of Montana. For more information, please contact scholarworks@mso.umt.edu.

2013 Nonresident Visitation, Expenditures & Economic Impact Estimates

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

Kara Grau, M.S.

7/1/2014

A collection of 2013 full year and quarterly estimates of nonresident visitation, expenditures by nonresident travelers, and economic impact estimates, including expenditures by purpose of trip and international visitors.

Visitation, Expenditures & Economic Impact Estimates

Prepared by

Kara Grau, M.S.

Institute for Tourism & Recreation Research
College of Forestry and Conservation
The University of Montana
Missoula, MT 59812
www.itrr.umt.edu

July 1, 2014

This study was funded by the Lodging Facility Use Tax

Copyright© 2014 Institute for Tourism and Recreation Research. All rights reserved.

2013 Nonresident Visitation, Expenditures & Economic Impact Estimates

2014

Table of Contents

2013 Nonresident Expenditures & Economic Contribution	4
2013 Montana Nonresident Traveler Quarterly Travel Comparison.....	5
2013 Montana Nonresident Traveler Expenditure Profiles.....	6
Quarter 1, 2013 Montana Nonresident Traveler Expenditure Profiles	7
Quarter 2, 2013 Montana Nonresident Traveler Expenditure Profiles	8
Quarter 3, 2013 Montana Nonresident Traveler Expenditure Profiles	9
Quarter 4, 2013 Montana Nonresident Traveler Expenditure Profiles	10
2003-2013 Montana Nonresident Traveler Expenditure Trends.....	11
2003-2013 Montana Nonresident Traveler Visitation Trends.....	12
2013 Expenditure Comparison of Overseas, Canadian, and Domestic Nonresident Travelers to Montana	13

2013 Montana Nonresident Traveler Expenditures & Economic Contribution

2013 Contribution of Nonresident Traveler Expenditures to Montana's Economy

- In 2013, nonresident visitors to Montana spent an estimated \$3.62 billion in the state. (See Table 2 below)
- This \$3.62 billion in local spending directly supports \$2.85 billion¹ of economic activity in the state, and supports an additional \$1.62 billion²⁺³ of economic activity, indirectly.
- The total contribution of nonresident spending to Montana's economy was \$4.47 billion⁴ in 2013.

Table 1 - 2013 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	\$2,848,400,000 ¹	\$754,900,000 ²	\$869,600,000 ³	\$4,472,900,000 ⁴
Employment (# of jobs)	33,670	6,370	8,220	48,260
Employee Compensation	\$834,300,000	\$196,970,000	\$244,980,000	\$1,276,250,000
Proprietor Income	\$145,150,000	\$39,110,000	\$44,900,000	\$229,160,000
Other Property Type Income	\$335,120,000	\$142,790,000	\$190,660,000	\$668,570,000
State & Local Taxes	=	=	=	\$236,080,000 *

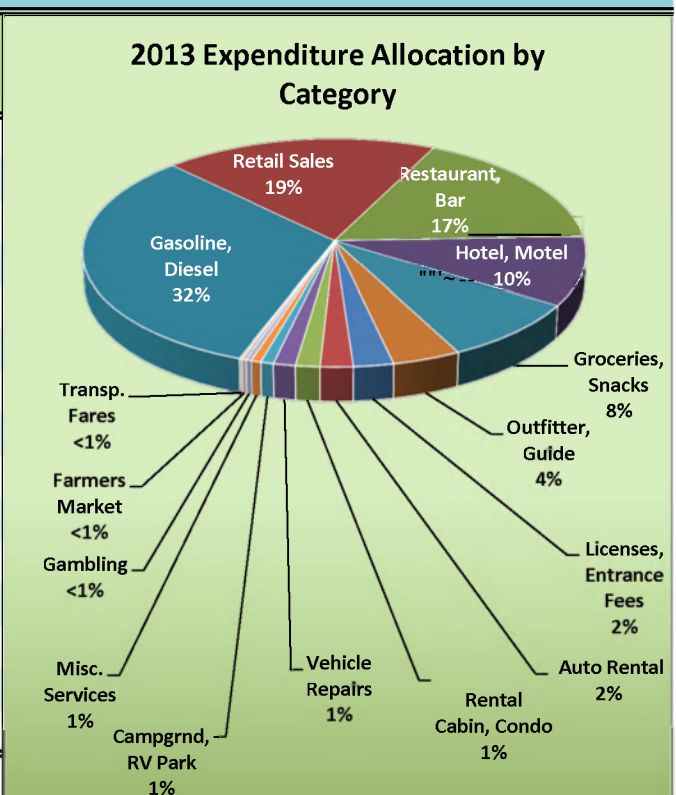
Direct impacts result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

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

* **CHANGE:** The IMPLAN data set *now* incorporates state-level BEA TOPI (taxes on production and imports) data, *rather than* using U.S. data to produce state-level estimates, as was done in previous IMPLAN data sets. Comparison to years prior to 2012 is not advised.

Table 2 - 2013 Nonresident Traveler Expenditures⁵

Expenditure Category	Average Daily Per Group ^{6,7}	Allocation by Category	Total Expenditures ^{6,8}
Gasoline, Diesel	\$51.64	32%	\$1,165,560,000
Retail Sales	\$31.55	19%	\$704,320,000
Restaurant, Bar	\$27.73	17%	\$625,300,000
Hotel, Motel	\$15.57	10%	\$354,220,000
Groceries, Snacks	\$13.70	8%	\$306,580,000
Outfitter, Guide	\$6.55	4%	\$143,690,000
Licenses, Entrance Fees	\$3.75	2%	\$84,160,000
Auto Rental	\$3.06	2%	\$68,720,000
Rental Cabin, Condo	\$2.25	1%	\$51,170,000
Vehicle Repairs	\$2.05	1%	\$45,970,000
Campground, RV Park	\$1.18	1%	\$26,730,000
Misc. Services	\$0.93	1%	\$20,780,000
Gambling	\$0.58	<1%	\$12,910,000
Farmers Market	\$0.38	<1%	\$8,460,000
Transportation Fares	\$0.26	<1%	\$5,930,000
Total	\$161.19		\$3,624,480,000



⁵Spending 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 representing the day during which they were intercepted by an ITRR surveyor.

⁶Data are collected quarterly. Therefore, avg. daily expenditures are weighted averages of quarterly figures. ⁷Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups. ⁸Expenditure category totals may not add to year total due to rounding.

2013 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 2013
Visitation & Length of Stay					
Nonresident Visitors	1,318,000	2,890,000	5,117,000	1,694,000	11,020,000
% of Total	12%	26%	46%	15%	100%
Nonresident Travel Groups	650,000	1,322,000	2,075,000	824,000	4,871,000
% of Total	13%	27%	43%	17%	100%
Group Size (people per group)	2.04	2.19	2.49	2.05	2.27
Length of Stay (nights)	4.24	3.99	5.23	4.54	4.64
Expenditure Category^{2, 3} (Average Daily per Group)	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Year Total¹
Gasoline, Diesel	\$41.19	\$51.00	\$54.02	\$52.62	\$51.64
Retail Sales	\$33.96	\$27.56	\$25.54	\$50.31	\$31.55
Restaurant, Bar	\$29.14	\$23.76	\$29.43	\$26.81	\$27.73
Hotel, B&B, etc.	\$17.40	\$16.65	\$15.61	\$13.11	\$15.57
Groceries, Snacks	\$11.77	\$10.38	\$14.94	\$15.31	\$13.70
Outfitter, Guide	\$2.94	\$2.66	\$7.89	\$9.61	\$6.55
Licenses, Entrance Fees	\$7.08	\$2.72	\$2.89	\$5.06	\$3.75
Auto Rental	\$3.99	\$2.36	\$3.01	\$3.37	\$3.06
Rental Cabin, Condo	\$3.29	\$1.59	\$2.71	\$1.15	\$2.25
Auto Repair	\$0.46	\$0.95	\$3.52	\$0.40	\$2.05
Campground, RV Park	\$0.01	\$1.10	\$1.84	\$0.25	\$1.18
Misc. Services	\$0.76	\$0.87	\$0.72	\$1.68	\$0.93
Gambling	\$0.37	\$0.53	\$0.50	\$0.98	\$0.58
Farmers Market	\$0.02	\$0.07	\$0.72	\$0.06	\$0.38
Transportation Fares	\$0.09	\$0.19	\$0.43	\$0.00	\$0.26
Total Average Daily per Group	\$152.47	\$142.39	\$163.77	\$180.72	\$161.19
Total Expenditures	\$420,470,000	\$751,150,000	\$1,776,950,000	\$675,910,000	\$3,624,480,000
% of Total	12%	21%	49%	19%	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 via on-site surveys of nonresident travelers at airports, gas stations, and rest areas in MT. Travelers report 24 hours worth of trip expenditures.

2013 Montana Nonresident Traveler Expenditure Profiles

Average 2013 Daily Expenditures by Purpose of Trip[^]

	Primary Purpose of Trip						
	All Travelers	Vacation	VFR ¹	Pass-Through	Business	Shopping	Other
Sample size	10,248	3,352	1,892	3,171	1,248	239	322
Nonresident Travelers	11,020,000	3,612,000	2,040,000	3,418,000	1,345,000	264,000	341,000
Group Size (people/group)*	2.27	2.76	2.16	2.09	1.55	2.18	2.02
Length of Stay (nights)*	4.64	6.00	6.30	1.05	7.65	3.09	6.92
% of All Travelers in 2013	100%	33%	19%	31%	12%	2%	3%
Gasoline, Diesel	\$51.64	\$50.01	\$37.80	\$65.04	\$45.08	\$49.93	\$42.22
Retail Sales	\$31.55	\$45.89	\$32.18	\$9.87	\$30.36	\$168.14	\$48.94
Restaurant, Bar	\$27.73	\$40.61	\$32.55	\$12.76	\$27.79	\$20.85	\$24.02
Hotel, B&B, etc.	\$15.57	\$19.41	\$10.62	\$12.75	\$20.98	\$11.33	\$12.39
Groceries, Snacks	\$13.70	\$19.86	\$16.51	\$6.21	\$8.12	\$35.62	\$9.05
Outfitter, Guide	\$6.55	\$17.92	\$2.70	\$0.95	\$1.44	\$0.00	\$0.48
Licenses, Entrance Fees	\$3.75	\$9.40	\$3.04	\$6.36	\$1.56	\$0.04	\$2.46
Auto Rental	\$3.06	\$4.26	\$2.80	\$0.57	\$7.37	\$0.07	\$2.36
Rental Cabin, Condo	\$2.25	\$5.72	\$0.95	\$0.10	\$0.81	\$0.00	\$0.88
Auto Repair	\$2.05	\$2.38	\$1.50	\$0.95	\$0.57	\$1.54	\$3.00
Campground, RV Park	\$1.18	\$2.13	\$0.36	\$0.80	\$0.21	\$0.46	\$0.39
Misc. Services	\$0.93	\$1.27	\$1.77	\$0.15	\$0.83	\$3.11	\$1.87
Gambling	\$0.58	\$0.70	\$0.66	\$0.46	\$0.66	\$1.45	\$0.01
Farmers Market	\$0.38	\$0.50	\$0.46	\$0.15	\$0.34	\$0.18	\$0.41
Transportation Fares	\$0.26	\$0.07	\$0.06	\$0.00	\$0.17	\$0.01	\$0.07
Total Avg. Daily per Group	\$161.19	\$220.13	\$143.96	\$117.11	\$146.28	\$292.74	\$148.54

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

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=8,646)	Mean ² of Those Who Spent	Median ³ of Those Who Spent
Gasoline, Diesel	6877	80%	\$63.97	\$53.00
Restaurant, Bar	4561	53%	\$52.09	\$35.00
Groceries, Snacks	2931	34%	\$39.47	\$20.00
Hotel, B&B, etc.	2870	33%	\$111.31	\$100.00
Retail Sales	1790	21%	\$155.73	\$70.00
Campground, RV Park	775	9%	\$30.94	\$30.00
Licenses, Entrance Fees	630	7%	\$54.79	\$25.00
Auto Rental	574	7%	\$46.79	\$50.00
Rental Cabin, Condo	312	4%	\$145.50	\$148.48
Misc. Services	217	3%	\$42.69	\$20.00
Outfitter, Guide	204	2%	\$260.21	\$165.60
Farmers Market	165	2%	\$16.27	\$13.65
Gambling	150	2%	\$33.44	\$30.00
Auto Repair	100	1%	\$121.06	\$100.00
Transportation Fares	17	<1%	\$32.23	\$23.91

*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 via on-site surveys of nonresident travelers at airports, gas stations, and rest areas in MT. Travelers report 24 hours worth of trip expenditures.

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.

Quarter 1, 2013 Montana Nonresident Traveler Expenditure Profiles

INSTITUTE FOR
TOURISM & RECREATION RESEARCH
UNIVERSITY OF MONTANA



Average Q1 Daily Expenditures by Purpose of Trip[^]

	Primary Purpose of Trip						
	All Travelers	Vacation	VFR ¹	Pass-Through	Business	Shopping	Other
Sample size	1,733	356	328	571	333	50*	92
Nonresident Travelers	1,318,000	271,000	250,000	435,000	254,000	40,000	70,000
Group Size (people/group)	2.04	2.94	1.82	1.94	1.48	1.80	2.13
Length of Stay (nights)	4.24	6.22	6.58	0.60	6.04	1.02	6.08
% of All Travelers in Q1	100%	21%	19%	33%	19%	3%	5%
Gasoline, Diesel	\$41.19	\$36.13	\$26.79	\$57.65	\$32.78	\$28.32	\$42.39
Retail Sales	\$33.96	\$80.90	\$40.73	\$6.30	\$15.36	\$168.87	\$14.13
Restaurant, Bar	\$29.14	\$63.99	\$36.19	\$8.49	\$26.25	\$25.24	\$19.81
Hotel, B&B, etc.	\$17.40	\$21.38	\$11.88	\$13.05	\$26.92	\$22.51	\$12.48
Groceries, Snacks	\$11.77	\$23.61	\$18.29	\$2.71	\$5.51	\$54.62	\$4.62
Licenses, Entrance Fees	\$7.08	\$27.06	\$3.70	\$2.18	\$0.88	\$0.00	\$1.86
Auto Rental	\$3.99	\$7.86	\$3.39	\$0.08	\$8.70	\$0.00	\$1.41
Rental Cabin, Condo	\$3.29	\$14.95	\$0.28	\$0.00	\$1.33	\$0.00	\$0.14
Outfitter, Guide	\$2.94	\$13.70	\$0.81	\$0.00	\$0.35	\$0.00	\$0.00
Misc. Services	\$0.76	\$1.55	\$0.46	\$0.03	\$0.54	\$0.89	\$4.47
Auto Repair	\$0.46	\$1.55	\$0.07	\$0.00	\$0.13	\$4.32	\$0.00
Gambling	\$0.37	\$0.62	\$0.48	\$0.00	\$0.54	\$2.08	\$0.00
Transportation Fares	\$0.09	\$0.00	\$0.33	\$0.03	\$0.00	\$0.00	\$0.46
Farmers Market	\$0.02	\$0.02	\$0.01	\$0.00	\$0.02	\$0.40	\$0.00
Campground, RV Park	\$0.01	\$0.02	\$0.00	\$0.02	\$0.00	\$0.00	\$0.00
Total Avg. Daily per Group	\$152.47	\$293.34	\$143.41	\$90.54	\$119.31	\$307.25	\$101.77

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

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=1,453)	Mean ² of Those Who Spent	Median ³ of Those Who Spent
Gasoline, Diesel	1070	74%	\$56.14	\$47.00
Restaurant, Bar	696	48%	\$61.07	\$35.00
Hotel, B&B, etc.	426	29%	\$96.62	\$89.00
Groceries, Snacks	375	26%	\$45.73	\$25.00
Retail Sales	267	18%	\$185.79	\$85.00
Auto Rental	124	9%	\$46.79	\$50.00
Licenses, Entrance Fees	111	8%	\$93.46	\$86.31
Rental Cabin, Condo	48	3%	\$162.09	\$148.46
Misc. Services	32	2%	\$34.50	\$15.45
Outfitter, Guide	29	2%	\$147.34	\$148.15
Gambling	18	1%	\$29.70	\$36.06
Auto Repair	8	1%	\$84.68	\$99.31
Farmers Market	7	<1%	\$3.85	\$3.85
Campground, RV Park	5	<1%	\$6.52	\$6.52
Transportation Fares	4	<1%	\$35.34	\$41.74

[^] 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 via on-site surveys of nonresident travelers at airports, gas stations, and rest areas in MT. Travelers report 24 hours worth of trip expenditures.

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, 2013 Montana Nonresident Traveler Expenditure Profiles

Average Q2 Daily Expenditures by Purpose of Trip[^]

	Primary Purpose of Trip						
	All Travelers	Vacation	VFR ¹	Pass-Through	Business	Shopping	Other
Sample size	2,541	763	434	911	299	55*	76
Nonresident Travelers	2,890,000	868,000	495,000	1,037,000	341,000	63,000	86,000
Group Size (people/group)	2.19	2.70	2.05	2.04	1.53	1.81	1.76
Length of Stay (nights)	3.99	4.79	5.98	0.90	8.08	0.99	10.48
% of All Travelers in Q2	100%	25%	19%	39%	13%	2%	3%
Gasoline, Diesel	\$51.00	\$50.82	\$34.00	\$63.95	\$41.21	\$45.78	\$35.65
Retail Sales	\$27.56	\$41.14	\$27.05	\$6.80	\$43.00	\$101.24	\$22.57
Restaurant, Bar	\$23.76	\$35.67	\$26.18	\$11.57	\$28.80	\$11.01	\$26.76
Hotel, B&B, etc.	\$16.65	\$23.68	\$10.70	\$13.09	\$20.61	\$4.05	\$16.73
Groceries, Snacks	\$10.38	\$15.11	\$13.21	\$6.02	\$5.87	\$23.32	\$7.23
Licenses, Entrance Fees	\$2.72	\$6.66	\$1.70	\$0.77	\$0.98	\$0.00	\$1.61
Outfitter, Guide	\$2.66	\$7.61	\$1.87	\$0.06	\$0.00	\$0.00	\$1.53
Auto Rental	\$2.36	\$3.00	\$2.31	\$0.84	\$5.31	\$0.00	\$4.44
Rental Cabin, Condo	\$1.59	\$4.47	\$0.41	\$0.06	\$1.12	\$0.00	\$0.72
Campground, RV Park	\$1.10	\$2.11	\$0.43	\$1.03	\$0.12	\$0.78	\$0.05
Auto Repair	\$0.95	\$0.83	\$1.50	\$0.29	\$0.49	\$3.72	\$6.42
Misc. Services	\$0.87	\$0.70	\$2.02	\$0.19	\$0.59	\$6.25	\$1.19
Gambling	\$0.53	\$0.55	\$0.64	\$0.47	\$0.71	\$0.28	\$0.03
Transportation Fares	\$0.19	\$0.40	\$0.06	\$0.00	\$0.50	\$0.00	\$0.04
Farmers Market	\$0.07	\$0.10	\$0.14	\$0.01	\$0.07	\$0.00	\$0.14
Total Avg. Daily per Group	\$142.39	\$192.85	\$122.22	\$105.15	\$149.38	\$196.43	\$125.11

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

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=2,089)	Mean ² of Those Who Spent	Median ³ of Those Who Spent
Gasoline, Diesel	1623	78%	\$65.65	\$55.00
Restaurant, Bar	1054	50%	\$47.06	\$33.42
Hotel, B&B, etc.	705	34%	\$102.63	\$96.00
Groceries, Snacks	642	31%	\$33.75	\$20.00
Retail Sales	410	20%	\$140.26	\$55.00
Campground, RV Park	168	8%	\$33.11	\$32.00
Licenses, Entrance Fees	144	7%	\$39.44	\$29.53
Auto Rental	117	6%	\$42.08	\$45.00
Rental Cabin, Condo	57	3%	\$120.41	\$148.48
Misc. Services	49	2%	\$37.32	\$23.39
Outfitter, Guide	39	2%	\$143.54	\$148.58
Gambling	38	2%	\$28.93	\$20.00
Auto Repair	21	1%	\$95.42	\$100.00
Farmers Market	13	1%	\$10.98	\$14.19
Transportation Fares	7	<1%	\$54.82	\$64.00

[^] 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 via on-site surveys of nonresident travelers at airports, gas stations, and rest areas in MT. Travelers report 24 hours worth of trip expenditures.

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, 2013 Montana Nonresident Traveler Expenditure Profiles

Average Q3 Daily Expenditures by Purpose of Trip[^]

	Primary Purpose of Trip						
	All Travelers	Vacation	VFR ¹	Pass-Through	Business	Shopping	Other
Sample size	3,917	1,871	658	943	293	65*	79
Nonresident Travelers	5,117,000	2,449,000	861,000	1,235,000	384,000	84,000	104,000
Group Size (people/group)	2.49	2.76	2.38	2.30	1.76	2.76	2.04
Length of Stay (nights)	5.23	6.17	6.55	1.44	8.67	0.89	8.33
% of All Travelers in Q3	100%	48%	17%	24%	8%	2%	2%
Gasoline, Diesel	\$54.02	\$51.55	\$46.56	\$64.46	\$52.96	\$70.66	\$45.39
Restaurant, Bar	\$29.43	\$36.82	\$31.88	\$14.61	\$25.95	\$23.19	\$23.35
Retail Sales	\$25.54	\$29.50	\$21.44	\$8.80	\$19.49	\$182.93	\$48.73
Hotel, B&B, etc.	\$15.61	\$17.79	\$11.10	\$14.11	\$18.25	\$9.57	\$12.11
Groceries, Snacks	\$14.94	\$19.64	\$15.15	\$6.14	\$9.64	\$24.55	\$13.99
Outfitter, Guide	\$7.89	\$13.18	\$5.13	\$1.22	\$4.44	\$0.00	\$0.00
Auto Repair	\$3.52	\$3.48	\$2.43	\$1.80	\$0.90	\$0.00	\$1.84
Auto Rental	\$3.01	\$3.97	\$3.17	\$0.47	\$5.90	\$0.00	\$1.08
Licenses, Entrance Fees	\$2.89	\$4.21	\$2.79	\$0.65	\$2.44	\$0.00	\$1.82
Rental Cabin, Condo	\$2.71	\$4.83	\$1.92	\$0.07	\$0.27	\$0.00	\$0.47
Campground, RV Park	\$1.84	\$2.99	\$0.56	\$0.99	\$0.32	\$0.88	\$0.89
Farmers Market	\$0.72	\$0.80	\$0.97	\$0.30	\$0.97	\$0.26	\$1.06
Misc. Services	\$0.72	\$1.47	\$0.96	\$0.04	\$0.33	\$2.57	\$1.49
Gambling	\$0.50	\$0.54	\$0.45	\$0.50	\$0.30	\$1.42	\$0.00
Transportation Fares	\$0.43	\$0.01	\$0.00	\$0.00	\$0.01	\$0.03	\$0.00
Total Avg. Daily per Group	\$163.77	\$190.78	\$144.51	\$114.16	\$142.17	\$316.06	\$152.22

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

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=3,349)	Mean ² of Those Who Spent	Median ³ of Those Who Spent
Gasoline, Diesel	2787	83%	\$65.04	\$53.00
Restaurant, Bar	1919	57%	\$51.38	\$39.00
Groceries, Snacks	1261	38%	\$39.67	\$24.34
Hotel, B&B, etc.	1188	35%	\$123.67	\$114.35
Retail Sales	759	23%	\$112.71	\$51.40
Campground, RV Park	563	17%	\$31.84	\$30.00
Licenses, Entrance Fees	288	9%	\$33.53	\$25.00
Auto Rental	214	6%	\$47.61	\$50.00
Rental Cabin, Condo	150	4%	\$169.73	\$160.00
Farmers Market	136	4%	\$17.67	\$18.00
Outfitter, Guide	115	3%	\$230.35	\$200.00
Misc. Services	87	3%	\$38.71	\$15.44
Auto Repair	59	2%	\$148.15	\$191.84
Gambling	52	2%	\$32.23	\$20.00
Transportation Fares	3	<1%	\$7.02	\$7.46

[^] 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 via on-site surveys of nonresident travelers at airports, gas stations, and rest areas in MT. Travelers report 24 hours worth of trip expenditures.

¹ Visiting friends and/or relatives. ² Mean, or average, is the sum of the values divided by the number of values. ³ 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, 2013 Montana Nonresident Traveler Expenditure Profiles

Average Q4 Daily Expenditures by Purpose of Trip[^]

	Primary Purpose of Trip						
	All Travelers	Vacation	VFR ¹	Pass-Through	Business	Shopping	Other
Sample size	2,057	362	472	746	323	75	69*
Nonresident Travelers	1,694,000	299,000	391,000	618,000	267,000	62,000	57,000
Group Size (people/group)	2.05	2.71	2.12	1.94	1.37	2.20	2.01
Length of Stay (nights)	4.54	7.40	6.07	0.99	7.45	0.81	8.37
% of All Travelers in Q4	100%	18%	23%	37%	16%	4%	3%
Gasoline, Diesel	\$52.62	\$53.21	\$31.50	\$69.57	\$46.72	\$38.69	\$46.26
Retail Sales	\$50.31	\$89.40	\$53.01	\$16.89	\$36.12	\$185.84	\$98.19
Restaurant, Bar	\$26.81	\$43.44	\$38.24	\$11.44	\$29.77	\$19.90	\$23.42
Groceries, Snacks	\$15.31	\$22.78	\$21.48	\$7.54	\$10.63	\$44.52	\$7.00
Hotel, B&B, etc.	\$13.11	\$20.02	\$8.84	\$9.35	\$21.81	\$9.59	\$7.28
Outfitter, Guide	\$9.61	\$49.89	\$0.00	\$1.72	\$0.00	\$0.00	\$0.00
Licenses, Entrance Fees	\$5.06	\$19.65	\$4.53	\$26.48	\$1.57	\$0.16	\$4.64
Auto Rental	\$3.37	\$4.04	\$2.23	\$0.58	\$11.44	\$0.28	\$1.84
Misc. Services	\$1.68	\$0.89	\$3.88	\$0.37	\$1.99	\$3.74	\$1.99
Rental Cabin, Condo	\$1.15	\$3.79	\$0.02	\$0.24	\$0.82	\$0.00	\$1.96
Gambling	\$0.98	\$1.56	\$1.20	\$0.50	\$1.14	\$1.71	\$0.00
Auto Repair	\$0.40	\$0.26	\$0.56	\$0.22	\$0.47	\$0.36	\$1.61
Campground, RV Park	\$0.25	\$0.31	\$0.12	\$0.30	\$0.30	\$0.00	\$0.36
Farmers Market	\$0.06	\$0.10	\$0.09	\$0.04	\$0.04	\$0.00	\$0.09
Transportation Fares	\$0.00	\$0.00	\$0.01	\$0.00	\$0.01	\$0.00	\$0.00
Total Avg. Daily per Group	\$180.72	\$309.34	\$165.71	\$145.24	\$162.84	\$304.79	\$194.64

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

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=1,750)	Mean ² of Those Who Spent	Median ³ of Those Who Spent
Gasoline, Diesel	1398	80%	\$65.89	\$56.00
Restaurant, Bar	892	51%	\$52.58	\$35.00
Groceries, Snacks	652	37%	\$41.12	\$20.00
Hotel, B&B, etc.	551	31%	\$107.11	\$90.00
Retail Sales	354	20%	\$243.23	\$120.00
Auto Rental	118	7%	\$49.96	\$50.00
Licenses, Entrance Fees	87	5%	\$101.42	\$40.00
Rental Cabin, Condo	56	3%	\$91.99	\$96.00
Misc. Services	49	3%	\$60.66	\$32.75
Campground, RV Park	44	3%	\$29.27	\$30.00
Gambling	42	2%	\$40.64	\$40.00
Outfitter, Guide	21	1%	\$783.17	\$550.00
Auto Repair	12	1%	\$56.88	\$41.42
Farmers Market	8	<1%	\$12.42	\$13.57
Transportation Fares	3	<1%	\$2.56	\$2.56

[^] 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.

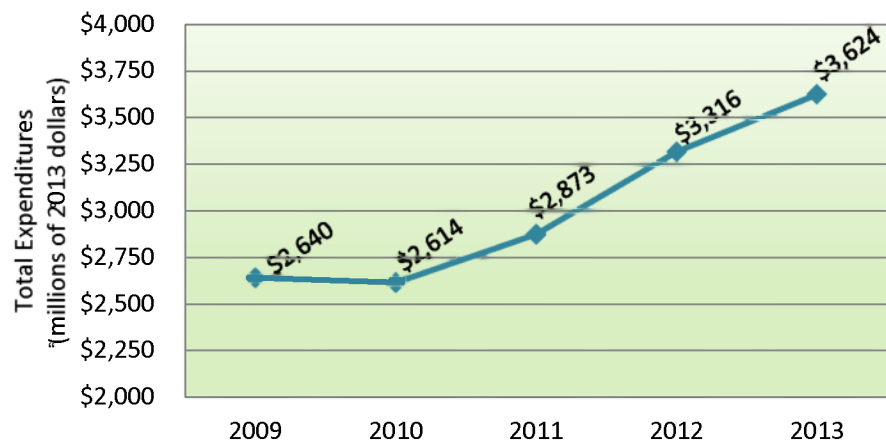
Spending data are gathered via on-site surveys of nonresident travelers at airports, gas stations, and rest areas in MT. Travelers report 24 hours worth of trip expenditures.

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.

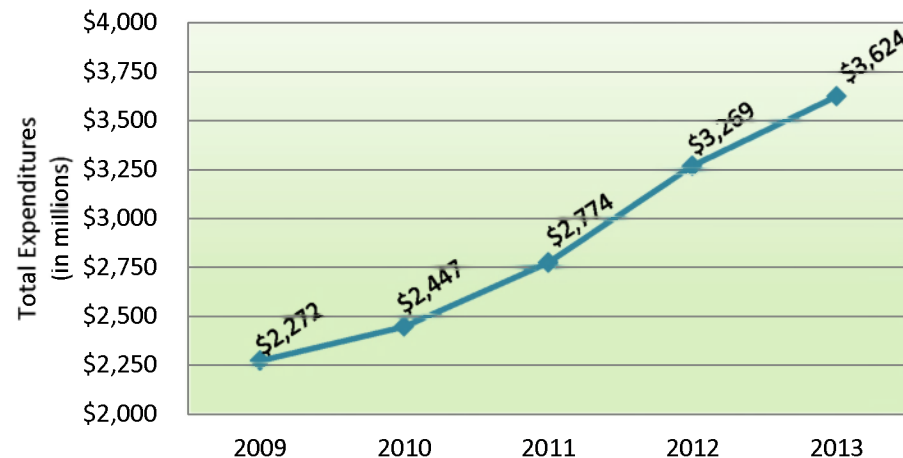
*Small sample size, use with caution.

2003-2013 Montana Nonresident Traveler Expenditure Trends

Total Inflation-Adjusted Expenditures



Total Actual Expenditures



Nonresident Traveler Expenditure Trends	2003	2004	2005	2006	2007	2008	2009	2010 ²	2011	2012	2013
Total Inflation-adjusted Expenditures (in millions of 2013 dollars ¹)	\$2,373	\$2,415	\$3,286	\$3,367	\$3,466	\$2,952	\$2,640	\$2,614	\$2,873	\$3,316	\$3,624
% Change from Previous Year	1.8%	1.8%	36.1%	2.5%	2.9%	-14.8%	-10.6%	-1.0%	9.9%	15.4%	9.3%
Total Actual Expenditures (in millions)	\$1,874	\$1,958	\$2,755	\$2,914	\$3,085	\$2,728	\$2,272	\$2,447	\$2,774	\$3,269	\$3,624
% Change from Previous Year	4.1%	4.5%	N/A ³	5.8%	5.9%	-11.6%	-16.7%	7.7%	13.4%	17.8%	10.9%

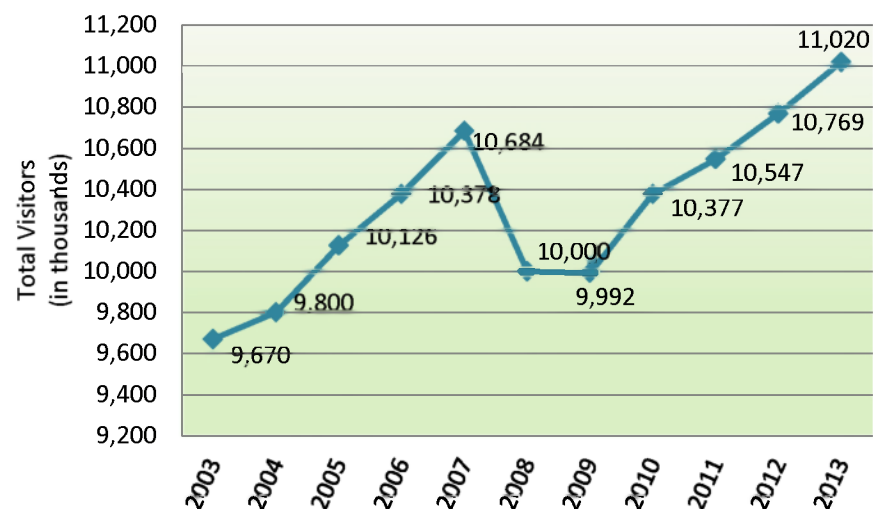
¹U.S. Dept. of Labor, Bureau of Labor Statistics. Consumer Price Index - All Urban Consumers (CPI-U). 1982-1984=100.

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

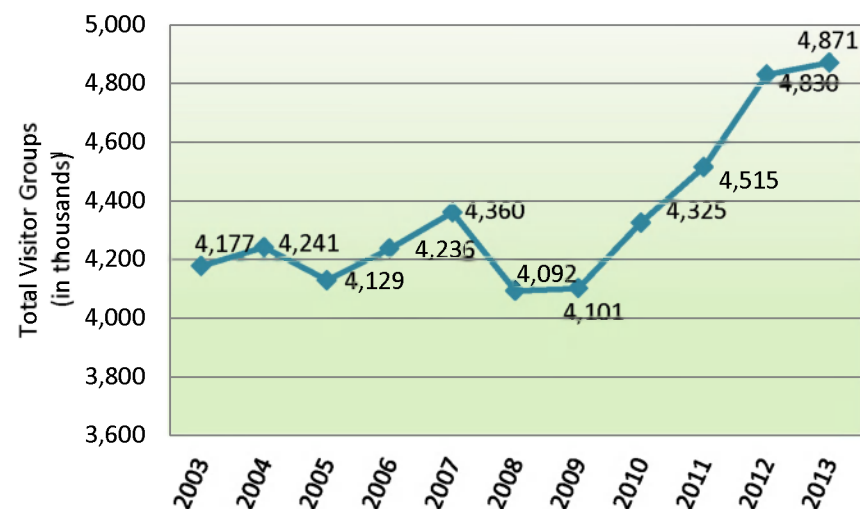
³Comparison to previous years is not advisable due to changes in model data.

2003-2013 Montana Nonresident Traveler Visitation Trends

Nonresident Visitors



Nonresident Travel Groups



Nonresident Traveler Visitation Trends	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Nonresident Visitors (in thousands)	9,670	9,800	10,126	10,378	10,684	10,000	9,992	10,377	10,547	10,769	11,020
% Change from Previous Year	-1.0%	1.3%	3.3%	2.5%	2.9%	-6.4%	-0.1%	3.9%	1.6%	2.1%	2.3%
Nonresident Travel Groups (in thousands, 2.27 people per group ¹)	4,177	4,241	4,129	4,236	4,360	4,092	4,101	4,325	4,515	4,830	4,871
% Change from Previous Year	4.2%	1.5%	-2.6%	2.6%	2.9%	-6.1%	0.2%	5.5%	4.4%	7.0%	0.8%

¹2013 group size is a weighted average of 2013 quarterly group sizes.

2013 Expenditure Comparison of Overseas, Canadian, and Domestic Nonresident Travelers to Montana

Overseas Visitors ¹				Canadian Visitors				Domestic Visitors			
Sample size	196			1,480			8,558				
Nonresident Travelers	209,000			1,600,000			9,210,000				
Group Size (people/group)	2.63			2.44			2.23				
Length of Stay (nights)	7.11			2.37			4.99				
% of All Travelers in 2013	2%			15%			83%				
Expenditure Category ^{2,3}	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	\$49.54	29%	\$352.20		\$52.48	30%	\$124.26		\$51.24	35%	\$255.85
Retail Sales	\$38.91	23%	\$276.62		\$48.63	28%	\$115.14		\$24.70	17%	\$123.32
Restaurant, Bar	\$31.80	18%	\$226.07		\$29.60	17%	\$70.07		\$26.72	18%	\$133.40
Hotel, B&B, etc.	\$13.79	8%	\$98.07		\$17.09	10%	\$40.46		\$12.10	8%	\$60.41
Groceries, Snacks	\$11.17	6%	\$79.43		\$9.01	5%	\$21.32		\$10.19	7%	\$50.87
Outfitter, Guide	\$10.92	6%	\$77.63		\$3.97	2%	\$9.40		\$3.46	2%	\$17.27
Rental Cabin, Condo	\$7.39	4%	\$52.53		\$1.98	1%	\$4.69		\$3.47	2%	\$17.30
Auto Rental	\$5.50	3%	\$39.11		\$1.23	1%	\$2.92		\$1.30	1%	\$6.47
Licenses, Entrance Fees	\$0.91	1%	\$6.44		\$1.94	1%	\$4.60		\$1.63	1%	\$8.13
Campground, RV Park	\$0.77	<1%	\$5.51		\$4.71	3%	\$11.16		\$7.58	5%	\$37.82
Gambling	\$0.64	<1%	\$4.54		\$1.86	1%	\$4.41		\$0.90	1%	\$4.47
Misc. Services	\$0.48	<1%	\$3.38		\$0.37	<1%	\$0.87		\$0.56	<1%	\$2.81
Auto Repair	\$0.19	<1%	\$1.33		\$0.40	<1%	\$0.94		\$0.38	<1%	\$1.88
Farmers Market	\$0.00	0%	\$0.00		\$0.89	1%	\$2.11		\$0.49	<1%	\$2.44
Transportation Fares	\$0.00	0%	\$0.00		\$0.01	<1%	\$0.02		\$0.06	<1%	\$0.30
Total Average Daily per Group	\$172.01		\$1,222.86		\$174.17		\$412.36		\$144.76		\$722.77
Total 2013 Expenditures	\$131,900,000				\$306,160,000				\$3,186,430,000		
% of Total	4%				8%				88%		

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 via on-site surveys of nonresident travelers 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.