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## **2019 Nonresident Visitation, Expenditures & Economic Impact Estimates**

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# 2019 Nonresident Visitation, Expenditures & Economic Impact Estimates

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

Kara Grau, M.S.

5/18/2020

A collection of 2019 full year and quarterly estimates of nonresident visitation, expenditures by nonresident travelers, and economic impact estimates, including expenditures by purpose of trip, airport of arrival, and international visitors.

## **Visitation, Expenditures & Economic Impact Estimates**

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# 2019 Nonresident Visitation, Expenditures & Economic Impact Estimates

2019

## Table of Contents

2019 Nonresident Expenditures & Economic Contribution .....	3
2019 Montana Nonresident Traveler Quarterly Travel Comparison .....	4
2019 Montana Nonresident Traveler Expenditure Profiles .....	5
Quarter 1, 2019 Montana Nonresident Traveler Expenditure Profiles .....	6
Quarter 2, 2019 Montana Nonresident Traveler Expenditure Profiles .....	7
Quarter 3, 2019 Montana Nonresident Traveler Expenditure Profiles .....	8
Quarter 4, 2019 Montana Nonresident Traveler Expenditure Profiles .....	9
2015-2019 Montana Nonresident Traveler Expenditure Trends.....	10
2009 -2019 Montana Nonresident Traveler Visitation Trends .....	11
2019 Expenditure Comparison of Overseas, Canadian, & Domestic Nonresident Travelers to Montana .	12
2019 Montana Airport of Arrival – Statewide Nonresident Expenditure Profiles .....	13

# 2019 Montana Nonresident Traveler Expenditures

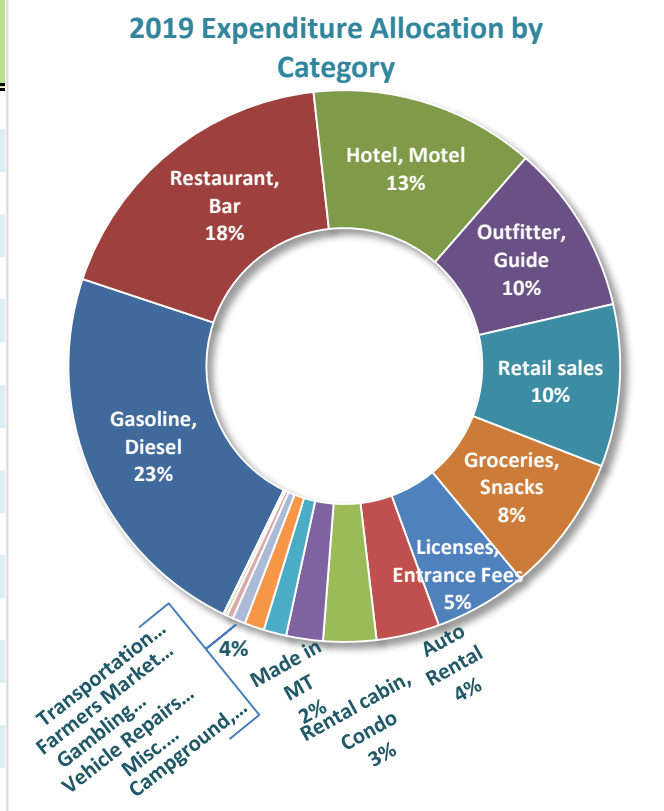
## & Economic Contribution

### 2019 Contribution of Nonresident Traveler Expenditures to Montana's Economy

- In 2019, nonresident visitors to Montana spent an estimated \$3.76 billion in the state. (See Table 1, below)
- This \$3.76 billion in local spending directly supports \$3.19 billion of economic activity in the state, and supports an additional \$2.23 billion of economic activity, indirectly. (see Table 2, below)
- The estimated total contribution of nonresident spending to Montana's economy was \$5.42 billion in 2019.

**Table 1 - 2019 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	\$34.49	23%	\$860,770,000
Restaurant, Bar	\$27.55	18%	\$681,020,000
Hotel, Motel	\$20.09	13%	\$496,440,000
Outfitter, Guide	\$15.30	10%	\$375,160,000
Retail sales	\$14.39	10%	\$357,820,000
Groceries, Snacks	\$12.21	8%	\$303,760,000
Licenses, Entrance Fees	\$8.85	5%	\$204,990,000
Auto Rental	\$5.67	4%	\$139,120,000
Rental cabin, Condo	\$4.90	3%	\$116,700,000
Made in MT	\$3.26	2%	\$80,840,000
Campground, RV Park	\$1.99	1%	\$50,110,000
Misc. Services	\$1.81	1%	\$43,500,000
Vehicle Repairs	\$1.12	1%	\$28,300,000
Gambling	\$0.57	<1%	\$14,200,000
Farmers Market	\$0.30	<1%	\$7,290,000
Transportation Fares	\$0.04	<1%	\$860,000
<b>Estimated Total</b>	<b>\$152.54</b>		<b>\$3,760,880,000</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 - 2019 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	\$3,186,620,000	\$1,150,290,000	\$1,085,390,000	\$5,422,300,000
Employment (# of jobs)	37,550	7,470	8,100	53,120
Employee Compensation	\$966,900,000	\$234,580,000	\$283,590,000	\$1,485,070,000
Proprietor Income	\$131,970,000	\$72,360,000	\$54,940,000	\$259,270,000
Other Property Type Income	\$326,430,000	\$148,630,000	\$194,470,000	\$669,530,000
State & Local Taxes				\$265,610,000

**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.

## 2019 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> 2019
<b>Visitation &amp; Length of Stay</b>					
Nonresident Visitors	1,343,000	3,397,000	5,904,000	1,992,000	12,636,000
% of Total	11%	27%	47%	16%	100%
Nonresident Travel Groups	668,000	1,588,000	2,471,000	1,014,000	5,741,000
% of Total	12%	28%	43%	18%	100%
Group Size (people per group)	2.00	2.12	2.37	1.96	2.19
Length of Stay (nights)	3.64	3.97	4.79	4.18	4.32
<b>Expenditure Category<sup>2,3</sup> (Average Daily per Group)</b>					
Gasoline, Diesel	\$29.40	\$38.75	\$34.44	\$32.39	\$34.49
Restaurant, Bar	\$28.95	\$24.70	\$28.53	\$27.64	\$27.55
Hotel, Motel	\$25.46	\$21.09	\$19.79	\$15.88	\$20.09
Outfitter, Guide	\$10.88	\$6.06	\$19.57	\$18.59	\$15.30
Retail sales	\$12.20	\$13.96	\$14.32	\$16.66	\$14.39
Groceries, Snacks	\$9.25	\$11.82	\$13.58	\$10.85	\$12.21
Licenses, Entrance Fees	\$35.94	\$3.95	\$3.75	\$11.40	\$8.85
Auto Rental	\$7.20	\$4.29	\$5.84	\$6.00	\$5.67
Rental cabin, Condo	\$12.96	\$3.32	\$4.58	\$2.37	\$4.90
Made in MT	\$2.58	\$2.87	\$3.75	\$2.85	\$3.26
Campground, RV Park	\$0.01	\$2.19	\$3.00	\$0.18	\$1.99
Misc. Services	\$5.14	\$1.71	\$0.91	\$2.23	\$1.81
Vehicle Repairs	\$0.07	\$0.95	\$1.19	\$1.90	\$1.12
Gambling	\$0.52	\$0.50	\$0.44	\$1.08	\$0.57
Farmers Market	\$0.01	\$0.07	\$0.43	\$0.41	\$0.30
Transportation Fares	\$0.18	\$0.01	\$0.02	\$0.03	\$0.04
	<b>\$180.75</b>	<b>\$136.24</b>	<b>\$154.14</b>	<b>\$150.46</b>	<b>\$152.54</b>
<b>Total Expenditures</b>	<b>\$439,340,000</b>	<b>\$858,650,000</b>	<b>\$1,824,810,000</b>	<b>\$638,090,000</b>	<b>\$3,760,880,000</b>
<b>% of Total</b>	<b>12%</b>	<b>23%</b>	<b>49%</b>	<b>17%</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.

## Montana Nonresident Traveler Expenditure Profiles

Average 2019 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	12,033	4,597	2,164	3,290	1,407	267	269
Nonresident Travelers	12,636,000	4,994,000	2,246,000	3,428,000	1,420,000	272,000	275,000
Group Size (people/group)	2.19	2.56	2.09	2.07	1.48	1.84	1.97
Length of Stay (nights)	4.32	5.74	5.93	0.93	5.62	0.32	4.41
% of All Travelers in 2019	100%	38%	18%	27%	12%	2%	2%
Gasoline, Diesel	\$34.49	\$27.74	\$20.22	\$54.14	\$32.53	\$41.71	\$29.25
Restaurant, Bar	\$27.55	\$36.47	\$34.28	\$13.00	\$28.68	\$12.16	\$22.39
Hotel, B&B, etc.	\$20.09	\$25.22	\$13.95	\$16.25	\$28.55	\$3.92	\$13.19
Outfitter, Guide	\$15.30	\$37.12	\$5.49	\$0.35	\$2.90	\$0.00	\$2.29
Retail Sales	\$14.39	\$17.31	\$18.78	\$4.33	\$14.12	\$54.65	\$22.42
Groceries, Snacks	\$12.21	\$14.27	\$16.58	\$6.88	\$9.35	\$21.33	\$11.67
Licenses, Entrance Fees	\$8.85	\$23.14	\$8.23	\$1.06	\$2.92	\$2.14	\$5.51
Auto Rental	\$5.67	\$8.37	\$5.42	\$0.46	\$11.15	\$0.07	\$5.14
Rental Cabin, Condo	\$4.90	\$12.15	\$2.90	\$0.20	\$1.49	\$0.23	\$1.79
Made in MT	\$3.26	\$4.40	\$5.57	\$0.78	\$2.43	\$1.13	\$3.34
Campground, RV Park	\$1.99	\$3.46	\$0.63	\$1.22	\$0.34	\$0.00	\$0.54
Misc. Services	\$1.81	\$3.19	\$2.35	\$0.40	\$1.40	\$3.48	\$5.40
Auto Repair	\$1.12	\$1.24	\$1.27	\$0.45	\$1.66	\$4.00	\$1.42
Gambling	\$0.57	\$0.50	\$1.03	\$0.29	\$1.11	\$0.22	\$0.41
Farmers Market	\$0.30	\$0.30	\$0.42	\$0.06	\$0.06	\$0.00	\$0.17
Transportation Fares	\$0.04	\$0.02	\$0.01	\$0.01	\$0.18	\$0.00	\$0.09
<b>Total Avg. Daily per Group</b>	<b>\$152.54</b>	<b>\$214.88</b>	<b>\$137.13</b>	<b>\$99.89</b>	<b>\$138.89</b>	<b>\$145.03</b>	<b>\$125.01</b>

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

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=10,110)	Mean <sup>2</sup> of Those Who Spent	Median <sup>3</sup> of Those Who Spent
Gasoline, Diesel	6,770	67%	\$51.72	\$41.00
Restaurant, Bar	5,095	50%	\$54.34	\$40.00
Hotel, B&B, etc.	3,188	32%	\$132.43	\$118.00
Groceries, Snacks	3,153	31%	\$38.76	\$25.00
Retail Sales	1,511	15%	\$96.27	\$50.00
Licenses, Entrance Fees	1,472	15%	\$64.42	\$16.00
Campground, RV Park	1,102	11%	\$40.55	\$40.00
Made in MT	968	10%	\$33.54	\$25.00
Auto Rental	919	9%	\$61.73	\$53.00
Rental Cabin, Condo	537	5%	\$183.65	\$170.00
Outfitter, Guide	410	4%	\$362.56	\$300.00
Farmers Market	399	4%	\$5.46	\$3.33
Misc. Services	279	3%	\$67.86	\$30.00
Gambling	172	2%	\$34.32	\$30.00
Auto Repair	83	1%	\$137.25	\$125.00
Transportation Fares	34	<1%	\$11.68	\$9.11

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

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

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

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

<sup>1</sup>Visiting friends and/or relatives. <sup>2</sup>Mean, or average, is the sum of the values divided by the number of values. <sup>3</sup>Median is the middle value in a string of numbers, with half of the values higher, and half lower than the median value.

# Quarter 1, 2019

## Montana Nonresident Traveler Expenditure Profiles

### Average Q1 Daily Expenditures by Purpose of Trip<sup>^</sup>

	Primary Purpose of Trip						
	All Travelers	Vacation	VFR <sup>1</sup>	Pass-Through	Business	Shopping*	Other*
Sample size	1,435	338	278	453	282	33	47
Nonresident Travelers	1,342,608	316,855	261,809	425,607	264,494	30,880	44,306
Group Size (people/group)	2.01	2.76	1.86	1.88	1.42	2.31	2.03
Length of Stay (nights)	3.64	5.41	6.22	0.72	4.12	0.07	3.11
% of All Travelers in Q1	100%	24%	20%	32%	20%	2%	3%
Licenses, Entrance Fees	\$35.94	\$123.15	\$26.56	\$0.72	\$6.97	\$13.34	\$6.85
Gasoline, Diesel	\$29.40	\$17.32	\$19.42	\$40.95	\$33.60	\$43.59	\$23.35
Restaurant, Bar	\$28.95	\$50.88	\$37.59	\$10.11	\$27.67	\$1.78	\$35.86
Hotel, B&B, etc.	\$25.46	\$38.92	\$19.72	\$13.24	\$38.51	\$3.31	\$18.29
Rental Cabin, Condo	\$12.96	\$49.77	\$4.35	\$0.10	\$1.88	\$0.00	\$4.30
Retail Sales	\$12.20	\$17.28	\$21.73	\$4.01	\$5.62	\$47.35	\$12.10
Outfitter, Guide	\$10.88	\$45.13	\$1.56	\$0.00	\$0.20	\$0.00	\$0.00
Groceries, Snacks	\$9.25	\$11.63	\$16.22	\$4.55	\$7.57	\$9.84	\$6.80
Auto Rental	\$7.20	\$14.44	\$4.97	\$0.44	\$11.94	\$3.57	\$8.17
Misc. Services	\$5.14	\$15.30	\$3.73	\$0.01	\$1.88	\$0.00	\$16.30
Made in MT	\$2.58	\$5.06	\$4.13	\$0.28	\$1.64	\$0.00	\$6.60
Gambling	\$0.52	\$0.85	\$1.09	\$0.02	\$0.51	\$0.00	\$0.00
Transportation Fares	\$0.18	\$0.15	\$0.00	\$0.06	\$0.59	\$0.00	\$0.36
Auto Repair	\$0.07	\$0.16	\$0.06	\$0.00	\$0.08	\$0.00	\$0.00
Campground, RV Park	\$0.01	\$0.01	\$0.00	\$0.02	\$0.00	\$0.00	\$0.00
Farmers Market	\$0.01	\$0.00	\$0.03	\$0.00	\$0.00	\$0.00	\$0.00
<b>Total Avg. Daily per Group</b>	<b>\$180.75</b>	<b>\$390.05</b>	<b>\$161.17</b>	<b>\$74.50</b>	<b>\$138.66</b>	<b>\$122.78</b>	<b>\$138.99</b>

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

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=1,201)	Mean <sup>2</sup> of Those Who Spent	Median <sup>3</sup> of Those Who Spent
Gasoline, Diesel	777	65%	\$45.48	\$39.18
Restaurant, Bar	600	50%	\$57.94	\$40.00
Hotel, B&B, etc.	385	32%	\$130.64	\$100.00
Groceries, Snacks	335	28%	\$33.20	\$20.00
Licenses, Entrance Fees	179	15%	\$241.62	\$160.00
Auto Rental	153	13%	\$56.58	\$50.00
Retail Sales	140	12%	\$104.54	\$55.35
Made in MT	104	9%	\$29.76	\$21.47
Rental Cabin, Condo	79	7%	\$324.41	\$325.00
Misc. Services	60	5%	\$102.59	\$113.86
Outfitter, Guide	39	3%	\$335.80	\$399.28
Gambling	18	2%	\$33.53	\$43.28
Transportation Fares	11	1%	\$20.79	\$17.35
Auto Repair	4	<1%	\$17.80	\$17.80
Campground, RV Park	3	<1%	\$5.99	\$5.99
Farmers Market	2	<1%	\$4.86	\$5.88

<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, 2019

### Montana Nonresident Traveler Expenditure Profiles

#### Average Q2 Daily Expenditures by Purpose of Trip<sup>^</sup>

	Primary Purpose of Trip						
	All Travelers	Vacation	VFR <sup>1</sup>	Pass-Through	Business	Shopping*	Other*
Sample size	3,227	1,086	515	1,053	385	91	72
Nonresident Travelers	3,397,090	1,151,614	546,931	1,117,643	407,651	95,119	78,133
Group Size (people/group)	2.13	2.47	2.11	2.10	1.41	1.61	1.84
Length of Stay (nights)	3.97	5.68	5.15	0.98	6.04	0.45	5.67
% of All Travelers in Q2	100%	34%	16%	33%	12%	3%	2%
Gasoline, Diesel	\$38.75	\$29.77	\$24.34	\$56.30	\$32.97	\$41.18	\$26.74
Restaurant, Bar	\$24.70	\$33.82	\$34.63	\$12.49	\$25.40	\$10.22	\$14.55
Hotel, B&B, etc.	\$21.09	\$26.56	\$13.28	\$18.05	\$29.88	\$3.42	\$8.48
Retail Sales	\$13.96	\$19.73	\$15.57	\$3.43	\$18.75	\$36.82	\$22.61
Groceries, Snacks	\$11.82	\$16.37	\$15.15	\$7.22	\$7.82	\$15.58	\$9.07
Outfitter, Guide	\$6.06	\$16.38	\$2.64	\$0.12	\$0.00	\$0.00	\$0.00
Auto Rental	\$4.29	\$6.31	\$3.78	\$0.72	\$9.80	\$0.00	\$5.79
Licenses, Entrance Fees	\$3.95	\$6.94	\$4.47	\$1.09	\$1.47	\$3.50	\$12.97
Rental Cabin, Condo	\$3.32	\$7.82	\$2.76	\$0.17	\$0.97	\$0.00	\$2.60
Made in MT	\$2.87	\$3.95	\$5.14	\$0.93	\$2.10	\$0.14	\$3.45
Campground, RV Park	\$2.19	\$4.20	\$0.47	\$1.71	\$0.45	\$0.00	\$1.08
Misc. Services	\$1.71	\$2.53	\$2.70	\$0.59	\$1.91	\$0.74	\$0.22
Auto Repair	\$0.95	\$1.43	\$0.58	\$0.06	\$1.68	\$3.73	\$1.99
Gambling	\$0.50	\$0.48	\$1.21	\$0.05	\$1.15	\$0.30	\$0.00
Farmers Market	\$0.07	\$0.13	\$0.09	\$0.01	\$0.02	\$0.00	\$0.04
Transportation Fares	\$0.01	\$0.00	\$0.00	\$0.00	\$0.05	\$0.00	\$0.00
<b>Total Avg. Daily per Group</b>	<b>\$136.24</b>	<b>\$176.42</b>	<b>\$126.82</b>	<b>\$102.94</b>	<b>\$134.42</b>	<b>\$115.63</b>	<b>\$109.60</b>

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

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=2,731)	Mean <sup>2</sup> of Those Who Spent	Median <sup>3</sup> of Those Who Spent
Gasoline, Diesel	1,965	72%	\$53.85	\$43.00
Restaurant, Bar	1,352	50%	\$49.88	\$40.00
Groceries, Snacks	865	32%	\$37.30	\$25.00
Hotel, B&B, etc.	853	31%	\$125.47	\$110.00
Retail Sales	362	13%	\$105.24	\$59.15
Licenses, Entrance Fees	328	12%	\$32.96	\$11.99
Campground, RV Park	300	11%	\$40.39	\$40.00
Made in MT	247	9%	\$31.73	\$24.00
Auto Rental	213	8%	\$54.99	\$50.00
Rental Cabin, Condo	136	5%	\$124.15	\$147.05
Misc. Services	76	3%	\$61.31	\$16.77
Outfitter, Guide	74	3%	\$224.73	\$266.79
Farmers Market	58	2%	\$3.06	\$4.06
Gambling	45	2%	\$30.48	\$30.00
Auto Repair	21	1%	\$120.70	\$162.34
Transportation Fares	4	<1%	\$3.97	\$3.97

<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, 2019

## Montana Nonresident Traveler Expenditure Profiles

### Average Q3 Daily Expenditures by Purpose of Trip<sup>^</sup>

	Primary Purpose of Trip						
	All Travelers	Vacation	VFR <sup>1</sup>	Pass-Through	Business	Shopping*	Other*
Sample size	5,100	2,635	835	1,127	348	77	71
Nonresident Travelers	5,903,796	3,052,263	968,223	1,304,739	401,458	88,557	82,653
Group Size (people/group)	2.37	2.60	2.24	2.25	1.56	1.89	2.10
Length of Stay (nights)	4.79	5.70	6.54	1.01	6.23	0.20	4.59
% of All Travelers in Q3	100%	52%	16%	22%	7%	2%	1%
Gasoline, Diesel	\$34.44	\$29.99	\$20.37	\$54.77	\$34.55	\$44.43	\$34.69
Restaurant, Bar	\$28.53	\$33.41	\$31.94	\$14.97	\$30.52	\$15.43	\$19.85
Hotel, B&B, etc.	\$19.79	\$22.41	\$14.29	\$16.85	\$26.79	\$4.44	\$12.07
Outfitter, Guide	\$19.57	\$32.87	\$8.73	\$0.72	\$8.21	\$0.00	\$8.17
Retail Sales	\$14.32	\$14.88	\$18.11	\$4.92	\$16.41	\$71.14	\$15.20
Groceries, Snacks	\$13.58	\$14.35	\$17.80	\$7.12	\$12.74	\$34.09	\$15.63
Auto Rental	\$5.84	\$7.55	\$6.77	\$0.20	\$10.37	\$0.00	\$2.76
Rental Cabin, Condo	\$4.58	\$7.40	\$3.25	\$0.29	\$1.34	\$0.00	\$0.30
Licenses, Entrance Fees	\$3.75	\$5.08	\$3.93	\$1.22	\$2.17	\$1.83	\$1.16
Made in MT	\$3.75	\$4.24	\$6.52	\$0.90	\$3.35	\$1.03	\$3.75
Campground, RV Park	\$3.00	\$4.70	\$1.13	\$1.35	\$0.56	\$0.00	\$0.47
Auto Repair	\$1.19	\$1.25	\$1.12	\$0.84	\$2.29	\$1.00	\$0.00
Misc. Services	\$0.91	\$0.86	\$1.93	\$0.24	\$1.13	\$0.45	\$1.08
Gambling	\$0.44	\$0.31	\$0.71	\$0.56	\$0.57	\$0.40	\$0.16
Farmers Market	\$0.43	\$0.50	\$0.79	\$0.12	\$0.13	\$0.00	\$0.22
Transportation Fares	\$0.02	\$0.01	\$0.02	\$0.01	\$0.15	\$0.00	\$0.16
<b>Total Avg. Daily per Group</b>	<b>\$154.14</b>	<b>\$179.80</b>	<b>\$137.42</b>	<b>\$105.09</b>	<b>\$151.28</b>	<b>\$174.24</b>	<b>\$115.67</b>

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

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=4,339)	Mean <sup>2</sup> of Those Who Spent	Median <sup>3</sup> of Those Who Spent
Gasoline, Diesel	2,860	66%	\$52.25	\$41.00
Restaurant, Bar	2,260	52%	\$54.77	\$45.00
Groceries, Snacks	1,419	33%	\$41.52	\$30.00
Hotel, B&B, etc.	1,350	31%	\$145.66	\$130.00
Campground, RV Park	773	18%	\$40.99	\$40.00
Retail Sales	751	17%	\$82.76	\$50.00
Licenses, Entrance Fees	747	17%	\$21.73	\$11.67
Made in MT	469	11%	\$34.68	\$25.00
Auto Rental	373	9%	\$67.96	\$60.00
Farmers Market	316	7%	\$5.86	\$3.33
Outfitter, Guide	264	6%	\$321.71	\$200.00
Rental Cabin, Condo	257	6%	\$179.40	\$175.00
Misc. Services	80	2%	\$49.48	\$12.00
Gambling	69	2%	\$27.88	\$20.00
Auto Repair	42	1%	\$122.57	\$110.57
Transportation Fares	9	<1%	\$10.11	\$10.49

<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, 2019

## Montana Nonresident Traveler Expenditure Profiles

### Average Q4 Daily Expenditures by Purpose of Trip<sup>^</sup>

	Primary Purpose of Trip						
	All Travelers	Vacation	VFR <sup>1</sup>	Pass-Through	Business	Shopping*	Other*
Sample size	2,271	538	536	657	392	66	79
Nonresident Travelers	1,992,383	472,195	470,202	577,791	344,682	57,779	69,733
Group Size (people/group)	1.96	2.45	1.96	1.83	1.52	1.87	1.93
Length of Stay (nights)	4.18	6.32	5.57	0.82	5.72	0.42	3.75
% of All Travelers in Q4	100%	24%	24%	29%	17%	3%	4%
Gasoline, Diesel	\$32.39	\$24.52	\$16.21	\$52.95	\$28.61	\$40.28	\$29.28
Restaurant, Bar	\$27.64	\$40.44	\$37.10	\$9.77	\$30.92	\$12.83	\$28.75
Outfitter, Guide	\$18.59	\$76.32	\$3.56	\$0.00	\$0.75	\$0.00	\$0.00
Retail Sales	\$16.66	\$22.70	\$21.62	\$5.10	\$9.56	\$65.27	\$34.35
Hotel, B&B, etc.	\$15.88	\$23.13	\$9.84	\$11.09	\$23.91	\$4.21	\$17.89
Licenses, Entrance Fees	\$11.40	\$36.12	\$9.53	\$0.69	\$3.66	\$0.00	\$0.22
Groceries, Snacks	\$10.85	\$12.94	\$15.45	\$6.37	\$7.61	\$19.92	\$12.91
Auto Rental	\$6.00	\$9.69	\$4.25	\$0.60	\$13.55	\$0.00	\$5.46
Made in MT	\$2.85	\$5.15	\$4.79	\$0.27	\$2.00	\$2.49	\$1.32
Rental Cabin, Condo	\$2.37	\$7.06	\$1.22	\$0.03	\$2.16	\$0.70	\$1.23
Misc. Services	\$2.23	\$3.39	\$2.01	\$0.55	\$0.85	\$9.27	\$11.48
Auto Repair	\$1.90	\$1.74	\$3.19	\$0.55	\$1.61	\$6.74	\$2.84
Gambling	\$1.08	\$0.98	\$1.53	\$0.26	\$2.15	\$0.00	\$1.37
Farmers Market	\$0.41	\$0.06	\$0.14	\$0.06	\$0.03	\$0.00	\$0.34
Campground, RV Park	\$0.18	\$0.46	\$0.06	\$0.13	\$0.09	\$0.00	\$0.19
Transportation Fares	\$0.03	\$0.00	\$0.00	\$0.00	\$0.18	\$0.00	\$0.00
<b>Total Avg. Daily per Group</b>	<b>\$150.46</b>	<b>\$264.70</b>	<b>\$130.50</b>	<b>\$88.42</b>	<b>\$127.64</b>	<b>\$161.71</b>	<b>\$147.63</b>

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

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=1,839)	Mean <sup>2</sup> of Those Who Spent	Median <sup>3</sup> of Those Who Spent
Gasoline, Diesel	1,168	64%	\$50.99	\$44.00
Restaurant, Bar	882	48%	\$57.61	\$44.72
Hotel, B&B, etc.	599	33%	\$113.67	\$100.00
Groceries, Snacks	535	29%	\$37.31	\$20.00
Retail Sales	259	14%	\$118.46	\$71.01
Licenses, Entrance Fees	216	12%	\$96.98	\$43.89
Auto Rental	180	10%	\$61.18	\$50.00
Made in MT	147	8%	\$35.61	\$25.00
Rental Cabin, Condo	66	4%	\$154.39	\$150.00
Misc. Services	62	3%	\$65.87	\$52.37
Gambling	40	2%	\$50.23	\$40.00
Outfitter, Guide	34	2%	\$1,015.47	\$1,303.12
Campground, RV Park	26	1%	\$32.82	\$35.72
Farmers Market	23	1%	\$6.08	\$3.47
Auto Repair	15	1%	\$240.52	\$186.67
Transportation Fares	9	1%	\$6.55	\$7.29

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

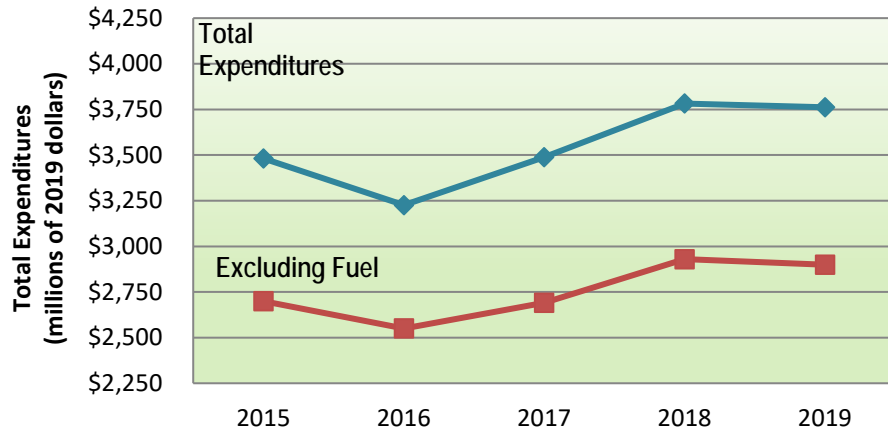
<sup>^^</sup> These figures represent the number and percent of visitor groups who actually spent money in each category. The dollar values are reflective of the actual average amount spent per category.

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.

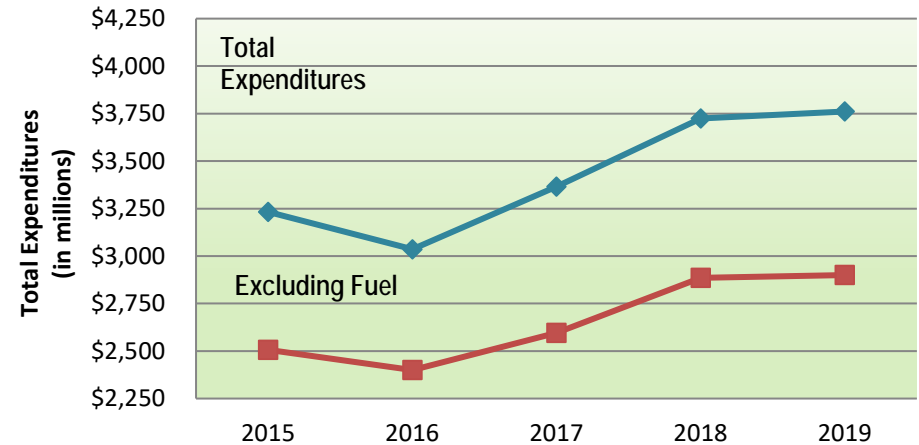
<sup>1</sup> Visiting friends and/or relatives. <sup>2</sup> Mean, or average, is the sum of the values divided by the number of values. <sup>3</sup> Median is the middle value in a string of numbers, with half of the values higher, and half lower than the median value. \*Small sample size, use with caution.

## 2015-2019 Montana Nonresident Traveler Expenditure Trends Overall Total & Excluding Fuel\*

### Total Inflation-Adjusted Expenditures



### Total Actual Expenditures

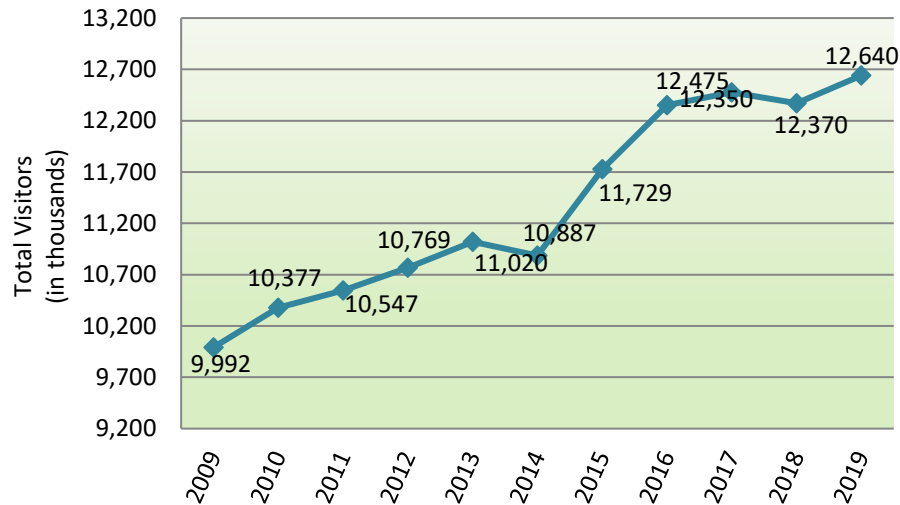


Nonresident Traveler Expenditure Trends	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
<b>Total Inflation-adjusted Expenditures</b>											
(millions of 2019 dollars <sup>1</sup> )	\$2,709	\$2,843	\$3,171	\$3,630	\$3,961	\$4,197	\$3,482	\$3,226	\$3,488	\$3,782	\$3,761
% Change from Previous Year	-16.7%	4.9%	11.5%	14.5%	9.1%	6.0%	-17.0%	-7.4%	8.1%	8.4%	-0.6%
<b>Excluding Fuel Expenditures (2019\$)</b>											
	\$1,861	\$1,918	\$2,088	\$2,350	\$2,688	\$2,863	\$2,699	\$2,550	\$2,691	\$2,930	\$2,900
% Change from Previous Year	-20.7%	3.1%	8.9%	12.5%	14.4%	6.5%	-5.7%	-5.5%	5.5%	8.9%	-1.0%
<b>Total Actual Expenditures (in millions)</b>											
	\$2,272	\$2,447	\$2,774	\$3,269	\$3,624	\$3,900	\$3,233	\$3,036	\$3,365	\$3,724	\$3,761
% Change from Previous Year	-16.7%	7.7%	13.4%	17.8%	10.9%	7.6%	-17.1%	-6.1%	10.8%	10.7%	1.0%
<b>Excluding Fuel Expenditures</b>											
	\$1,561	\$1,651	\$1,827	\$2,116	\$2,459	\$2,661	\$2,506	\$2,400	\$2,596	\$2,885	\$2,900
% Change from Previous Year	-20.6%	5.8%	10.7%	15.8%	16.2%	8.2%	-5.8%	-4.2%	8.2%	11.1%	0.5%

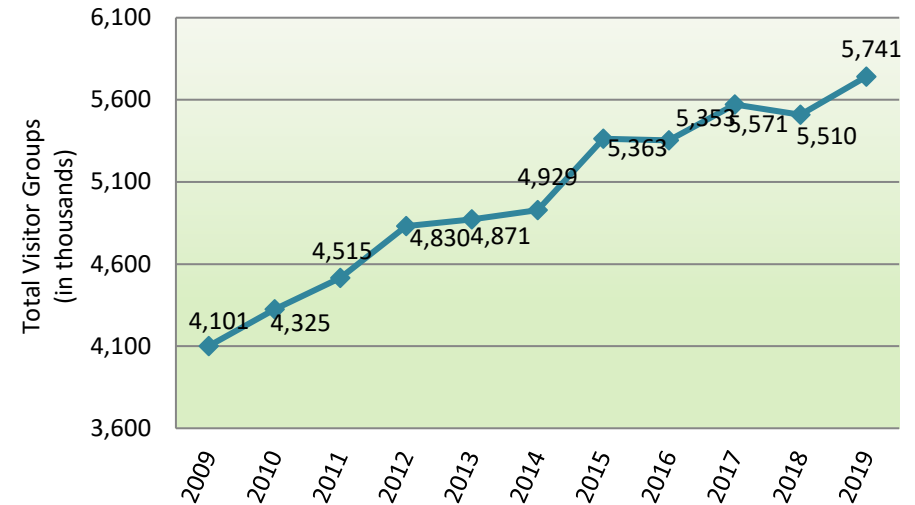
\*Fuel is generally the largest portion of nonresident travelers' spending, making total traveler expenditure figures susceptible to fluctuations in gas prices. Removing fuel expenditures from the total allows for the trend to be viewed without this external factor's effect. <sup>1</sup>U.S. Bureau of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

## 2009-2019 Montana Nonresident Traveler Visitation Trends

### Nonresident Visitors



### Nonresident Travel Groups



Nonresident Traveler Visitation Trends	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Nonresident Visitors (in thousands)	9,992	10,377	10,547	10,769	11,020	10,887	11,729	12,350	12,475	12,370	12,640
% Change from Previous Year	-0.1%	3.9%	1.6%	2.1%	2.3%	-1.2%	7.7%	5.3%	1.0%	-0.8%	2.2%
Nonresident Travel Groups (in thousands <sup>1</sup> )	4,101	4,325	4,515	4,830	4,871	4,929	5,363	5,353	5,571	5,510	5,741
% Change from Previous Year	0.2%	5.5%	4.4%	7.0%	0.8%	1.2%	8.8%	-0.2%	4.1%	-1.1%	4.2%
Average people per group	2.46	2.38	2.31	2.22	2.24	2.19	2.19	2.31	2.23	2.27	2.19

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

# 2019 Expenditure Comparison of Overseas, Canadian, and Domestic Nonresident Travelers to Montana

Overseas Visitors <sup>1</sup>				Canadian Visitors				Domestic Visitors			
Sample size	210			1,142			11,158				
Nonresident Travelers	164,000			1,314,000			11,157,000				
Group Size (people/group)	2.36			1.89			2.18				
Length of Stay (nights)	5.01			2.10			4.46				
% of All Travelers in 2019	2%			9%			89%				
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	\$21.10	10%	\$105.79		\$43.57	30%	\$91.29		\$33.92	22%	\$151.24
Restaurant, Bar	\$35.56	18%	\$178.34		\$23.80	16%	\$49.87		\$27.80	18%	\$123.95
Hotel, B&B, etc.	\$39.77	20%	\$199.42		\$18.66	13%	\$39.10		\$20.01	13%	\$89.24
Outfitter, Guide	\$18.73	9%	\$93.91		\$3.83	3%	\$8.02		\$16.15	11%	\$72.00
Retail Sales	\$8.11	4%	\$40.67		\$19.02	13%	\$39.85		\$14.10	9%	\$62.88
Groceries, Snacks	\$18.21	9%	\$91.33		\$13.89	10%	\$29.10		\$12.01	8%	\$53.55
Licenses, Entrance Fees	\$27.14	13%	\$136.09		\$11.23	8%	\$23.53		\$8.54	6%	\$38.10
Auto Rental	\$10.69	5%	\$53.63		\$0.49	0%	\$1.03		\$5.97	4%	\$26.60
Rental Cabin, Condo	\$12.02	6%	\$60.28		\$3.02	2%	\$6.33		\$4.83	3%	\$21.53
Made in Montana	\$1.13	1%	\$5.67		\$1.89	1%	\$3.96		\$3.30	2%	\$14.69
Campground, RV Park	\$1.14	1%	\$5.72		\$2.17	2%	\$4.56		\$2.00	1%	\$8.91
Misc. Services	\$5.53	3%	\$27.73		\$1.22	1%	\$2.55		\$1.85	1%	\$8.24
Auto Repair	\$1.08	1%	\$5.42		\$0.75	1%	\$1.58		\$1.15	1%	\$5.14
Gambling	\$0.63	<1%	\$3.18		\$0.54	<1%	\$1.13		\$0.58	<1%	\$2.58
Farmers Market	\$0.47	<1%	\$2.34		\$0.23	<1%	\$0.49		\$0.24	<1%	\$1.09
Transportation Fares	\$0.10	<1%	\$0.49		\$0.01	<1%	\$0.03		\$0.04	<1%	\$0.18
<b>Total Average Daily per Group</b>	<b>\$201.42</b>		<b>\$1,010.02</b>		<b>\$144.31</b>		<b>\$302.42</b>		<b>\$152.49</b>		<b>\$679.92</b>
<b>Total 2019 Expenditures</b>	<b>\$101,250,000</b>				<b>\$165,740,000</b>				<b>\$3,493,900,000</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.

# 2019 Montana Airport of Arrival Statewide Nonresident Expenditure Profiles

## Avg. Daily Group Expenditures by Airport of Arrival<sup>1</sup> (Expenditures represent full trip in MT, not spending exclusively in arrival city.)

	Airport of Arrival in Montana <sup>2, 3</sup>						
	All Fliers	Billings	Bozeman	Great Falls	Helena	Kalispell	Missoula
Sample size	1,301	259	463	106	63	227	226
Nonresident Travelers	1,466,000	287,000	513,000	118,000	70,000	252,000	250,000
Group Size (people/group)	2.10	1.57	2.60	1.80	1.51	2.17	1.84
Length of Stay (nights)	6.24	5.44	6.52	6.70	6.28	6.65	6.41
% of All Travelers in 2019	11.6%	2.2%	3.9%	0.9%	0.5%	1.9%	1.9%
Outfitter, Guide	\$51.72	\$31.92	\$69.94	\$19.08	\$5.50	\$24.66	\$21.38
Restaurant, Bar	\$49.18	\$31.75	\$56.12	\$35.51	\$41.74	\$47.21	\$46.01
Auto Rental	\$34.68	\$28.69	\$41.58	\$26.40	\$21.00	\$40.44	\$34.08
Licenses, Entrance Fees	\$25.83	\$4.52	\$59.11	\$9.57	\$4.49	\$19.83	\$11.68
Hotel, B&B, etc.	\$25.33	\$21.73	\$27.41	\$22.55	\$25.38	\$23.38	\$27.84
Retail Sales	\$20.88	\$13.23	\$19.73	\$15.95	\$17.22	\$16.40	\$18.76
Groceries, Snacks	\$12.72	\$9.64	\$14.93	\$11.47	\$6.26	\$14.26	\$11.09
Gasoline, Diesel	\$11.18	\$10.74	\$9.43	\$12.10	\$12.24	\$7.13	\$9.13
ntal Home, Cabin, Condo	\$10.22	\$2.75	\$19.59	\$2.32	\$1.56	\$10.78	\$4.90
Made in Montana	\$7.19	\$4.89	\$4.80	\$4.86	\$7.43	\$10.09	\$5.05
Misc. Services	\$1.37	\$1.05	\$13.01	\$0.51	\$2.26	\$3.35	\$4.04
Gambling	\$0.53	\$0.67	\$0.30	\$1.30	\$1.13	\$0.89	\$0.63
Farmers Market	\$0.30	\$0.10	\$0.22	\$0.11	\$0.21	\$0.52	\$0.27
Campground, RV Park	\$0.23	\$0.09	\$0.04	\$0.00	\$0.00	\$0.57	\$0.58
Transportation Fares	\$0.14	\$0.39	\$0.05	\$0.49	\$0.84	\$0.12	\$0.15
Vehicle Repair	\$0.04	\$0.00	\$0.00	\$1.05	\$0.92	\$1.96	\$0.07
<b>Total Avg. Daily per Group</b>	<b>\$251.54</b>	<b>\$162.18</b>	<b>\$336.25</b>	<b>\$163.27</b>	<b>\$148.18</b>	<b>\$221.59</b>	<b>\$195.64</b>
<b>Estimate of Statewide Spending</b>	<b>\$991,570,000</b>	<b>\$110,870,000</b>	<b>\$492,920,000</b>	<b>\$56,350,000</b>	<b>\$28,400,000</b>	<b>\$162,240,000</b>	<b>\$137,640,000</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.