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# **THE ECONOMIC REVIEW OF THE TRAVEL INDUSTRY IN MONTANA**

## **2010 BIENNIAL EDITION**

**The Institute for Tourism and Recreation Research  
The University of Montana - Missoula**



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Authored by:  
Kara Grau, M.S.  
Research Associate



**The Institute for Tourism and Recreation Research  
College of Forestry and Conservation  
The University of Montana  
32 Campus Drive #1234  
Missoula, MT 59812-1234  
(406) 243-5686**

**[www.itrr.umt.edu](http://www.itrr.umt.edu)**



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## EXECUTIVE SUMMARY

- In 2009, travel expenditures by nonresident visitors totaled over \$2.27 billion, which generated \$2.33 billion in total economic impact.
  - Nearly 10 million individual nonresident travelers visited Montana in 2009, down just 0.1 percent from 2008. This amounts to 4.1 million nonresident travel groups (2.44 people per group).
  - Nonresident visitor spending directly generated over 19,000 travel jobs to Montana, and contributed to a total of almost 22,500 jobs, leading to over \$660 million in total personal income for Montana residents.
  - Montana state and local governments received an estimated \$153 million in taxes attributable to nonresident traveler spending; the federal government collected \$142 million in taxes from nonresident spending.
  - The nonresident travel industry in Montana comprises 3.9 percent of the state's total employment, making it the seventh largest employer, following just behind agriculture (4.4% of total employment).
  - Montana ranks 42<sup>nd</sup> in the U.S. for tourist spending, but 5<sup>th</sup> in the nation in per capita tourist spending.
  - Nonresident vacationers to Montana in 3<sup>rd</sup> quarter, 2009 came primarily from the U.S. (87%), while eight percent came from Canada and four percent came from other foreign countries. Residencies of vacationers in 4<sup>th</sup> quarter, 2009 were very similar, with 86 percent from the U.S., 13 percent from Canada, and one percent from other foreign countries.
  - Mountains and forests; Yellowstone and Glacier National Parks; and open space and uncrowded areas were the most frequent attractions for vacationers in Montana, while scenic driving and wildlife watching are the most popular activities.
  - Visitation to Montana State parks, including both resident and nonresident visitors, increased 12 percent in 2009 over 2008.
  - Airline passenger traffic decreased 4.6 percent in 2009 from 2008. The overall increase from 2002 to 2009 was 10.4 percent.
  - Amtrak ridership in 2009 decreased 10 percent from 2008. Montana's busiest station in Whitefish also had a 10 percent decrease in 2009.
  - While room supply was up 1.1 percent in 2009, room demand was down 4.5 percent. Occupancy rates decreased each of the last three years, and average daily rates decrease 1.6 percent in 2009.
  - Prices in the food service industry rose 3.5 percent in 2009, as opposed to the Consumer Price Index which decreased by 0.4 percent.
  - Personal income in Montana's arts, entertainment and recreation services industry increased 5.4 percent from 2008 to 2009, while Gross Domestic Product by State decreased 0.7 percent from 2007 to 2008.
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## **Section 1: Economic Impact of Nonresident Travel**

### **Introduction**

An introduction to this review and the travel industry.

### **Travel and the Economy**

A brief analysis of the travel industry within the Montana economy.

### **Travel Volume**

Data on nonresident travelers in Montana.

### **Travel Expenditures**

Time-series data on travel expenditures in Montana with comparisons to changes in the overall state economy.

### **Travel-Generated Income**

Time-series data on travel-generated and overall income in Montana.

### **Travel-Generated Employment**

Overview of employment created within the travel industry sectors, seen in relation to other non-farm employment.

### **Montana Employment Structure**

Current and historic make-up of Montana's employment structure.

### **Travel-Generated Tax Revenue**

Itemization of funds received by governments from taxes generated by nonresident travelers.

### **Travel Inflation**

Comparisons of travel inflation and overall consumer inflation.

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## INTRODUCTION

This is the sixth edition of the biennial report, The Economic Review of the Travel Industry in Montana. This review provides current and historical data of nonresident travel and tourism in Montana, and offers the industry's economic impacts to the state. In most cases this report provides updated information for 2008 and 2009. In order to provide the most objective data and analysis, only the most impartial sources were used and are noted throughout the report.

### ***Defining Travel and the Travel Industry***

The definition of *travel* is not necessarily clear cut. The Institute for Tourism and Recreation Research (ITRR) at the University of Montana uses two definitions distinguished by the type of traveler, nonresident or resident. When Montana residents travel within the state, they are termed "resident travelers." However, "nonresident travelers" are those who travel within Montana but do not maintain permanent residency in the state.

Another complication is the definition of the travel industry itself. It is difficult to define because of its diverse and complex nature, comprised of different industry segments such as airlines, food services, accommodations, retail and others. These industries are related not because of the nature of their product, but because of a common consumer—the traveler. The difficulty of measuring the travel industry is compounded by the fact that these industry segments generally derive only a portion of their business from travelers.

This diversity can be viewed as a strength for the industry. In the words of the U.S. Travel Association (p 4, TIA, 2005):

A very wide range of businesses and their employees ultimately benefit from travelers. Buses, automobiles, airlines, rail, and other transportation companies bring travelers into an economic region. These consumers in turn purchase products and services offered by local lodging establishments, restaurants, amusement, recreational and entertainment establishments, and general retail outlets. This process creates many employment and business opportunities, all of which help sustain and expand the local economy.

Furthermore, the travel industry contributes to a diversified economic base, making the economy of a tourism area much more resilient than one relying on a single industry. This is especially true when it comes to the effects of adverse economic conditions, shifting consumer preferences, technological advances, and other economic influences. Some still doubt the importance of the travel and tourism industry. In Montana, however, nonresident travel contributes jobs to every industrial sector, directly or indirectly<sup>1</sup>.

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<sup>1</sup> Grau, 2007.

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As for the industry's potential weaknesses, it faces several challenges due to the varied nature of the types of businesses that benefit from tourism and travel in general. The same economic complexity that is one of the industry's strengths also makes it hard to quantitatively measure and compare to other, more easily quantifiable, industries. As a consequence, government officials, business executives, and the general public have been slow in grasping the significance of the industry. This lack of recognition is perhaps the industry's greatest hurdle and can make it vulnerable to unfavorable policy decisions and negative press. However, the aftermath of the terrorist attacks of September 11, 2001 helped bring attention to the importance of the travel industry as an integral part of national and state economies. In the years that have followed, the tourism industry's importance has gained clout both as a source of employment and income, but also as an indicator of the overall health of the economy. Likewise, the hit the travel industry has taken during the current recession and the effect of the Gulf oil spill on regional tourism is reemphasizing the important role that travel plays in the economy.

### ***Publication Notes***

Most information in this report is given both in text and table format, and all sources are indicated. In addition to research publications, ITRR sources include figures estimated using the IMPLAN<sup>2</sup> input-output economic model.

This publication focuses on the impact of spending by nonresidents in Montana because these travelers bring out-of-state dollars to the state's economy. The Institute concentrates its data collection at the statewide level and focuses on nonresident dollars moving into the Montana economy rather than between counties and communities within the state. Data would need to be collected at the county level to allow for accurate reporting of county-level economic impacts.

The Institute would be remiss not to mention the contribution of Montana resident travelers. Based on a 2005 statewide survey<sup>3</sup>, Montana residents spend over \$913 million (2009\$) per year on pleasure travel within the state. How these resident dollars are distributed across sectors and between counties has not yet been determined. It is hoped that readers of this report recognize that what is documented here does not reflect every aspect of Montana's total travel industry.

In order to clarify the use of some terms found in this report, some discussion of their meanings is necessary. The term *expenditure* refers to the estimated dollars spent by nonresidents traveling in Montana. These expenditures were estimated by surveying nonresidents in 2005 and 2009, recording their travel spending, and then inputting the data in the Institute's Nonresident Expenditure Estimation Model<sup>4</sup>. *Impacts*, however, are various economic effects to Montana's economy by nonresident travelers and are estimated in the IMPLAN input-output model. This aggregated economic model produces three types of impacts: 1) *direct impacts* result from the purchases of goods and services made by nonresident travelers; 2) *indirect impacts* result from the purchases made by travel-related businesses (e.g., suppliers); and 3) *induced impacts* result from purchases by those employed in travel-related occupations. The *total impact* is the sum of these impacts. Unless otherwise noted, all travel industry figures (economic impacts, income, employment, and taxes) in Section 1 are the total impact.

It is important to note that one dollar of travel spending can generate different amounts of personal income within the various travel industry sectors, depending on the labor content and the wage structure of each sector. Additionally, the same direct impact can generate various levels of indirect and induced effects, depending on the availability of raw materials and labor within an economic region. The more inputs that need to be imported from outside the region to generate a final product, the smaller the indirect and induced impacts on Montana.

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<sup>2</sup> Minnesota IMPLAN Group, Inc. Stillwater, MN. [www.implan.com](http://www.implan.com).

<sup>3</sup> Nickerson, 2006.

<sup>4</sup> Total Annual Nonresident Expenditures =  $\sum$  (number of groups) (average daily spending per group) (length of stay)

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Readers should note that both the 2008 and 2009 figures are based on IMPLAN's Montana 2008 dataset and updated structural matrices. Datasets for IMPLAN are generated using economic data collected from federal agencies such as the Bureau of Labor Statistics and the Bureau of Economic Analysis. Based on this data, there are 334 industries in Montana reflected in the model.

The Institute's Nonresident Visitation Estimation Model and Nonresident Expenditure Estimation Model data were updated beginning July, 1, 2009. Traffic volume data and proportion counts of residents and nonresidents entering the state were revised in the Nonresident Visitation Estimation Model. Because a full calendar year of updated nonresident data is not yet available, information from ITRR's quarters 3 and 4, 2009 Montana Nonresident Travel Survey were combined with quarters 1 and 2, 2005 data in the Institute's Nonresident Expenditure Estimation Model. This information includes expenditure data, visitor characteristics, length of stay (approximately 4.8 days) and travel group size (2.44 persons per group).

Lastly, in regard to currency reporting, all dollar figures in this review are inflation-adjusted to 2009 dollars to isolate changes in revenue, income, receipts, etc. from the effects of inflation. The index used to adjust dollar figures is the U.S. Department of Labor's Consumer Price Index, All Urban Consumers (CPI-U<sup>5</sup>).

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<sup>5</sup> U.S. Dept. of Labor, Bureau of Labor Statistics. Base period: 1982-1984=100.

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## **TRAVEL AND THE ECONOMY**

Travel volume in Montana and the United States is influenced by economic conditions at the local, national and global levels. Conversely, travel to and within Montana affects the state economy, along with local economies within the state. As this report briefly shows, the travel industry can have considerable impact on a region's economic conditions, while itself being strongly influenced by economic conditions elsewhere. Changes in the economy have the power to impact travel volume and travel spending, which in turn affects the related economic benefits associated with travel spending. Much of this spending serves to redistribute funds to where people travel, such as from urban to rural areas or from rapidly growing areas to slower-growing ones.

### ***Travel and Tourism: A Powerful Economic Force***

Tourism's contribution to Montana's economy had been on an upward trend until 2008 when gas prices and the recent recession began affecting travel. In 2009, total impacts by nonresident travelers to Montana were \$2.3 billion in total industry output (Table 1). These economic impacts contributed to the generation of over 25,000 jobs, and over \$660 million in personal income. Nonresident travel-generated taxes at the state and local levels amounted to nearly \$153 million, while federal tax revenue exceeded \$141 million.

Part of the state tax revenue is generated by nonresident travelers' contributions to the statewide Accommodations Tax (currently at 7%). Three percent of the seven percent goes to the State General Fund. The remaining four percent is distributed to the Montana Historical Society, the University Travel Research Program, the Department of Revenue, Montana State parks, the Montana Trade Program and the Department of Commerce, which in turn distributes funds to communities and regions across the state. Further tax discussion is provided in the Travel-Generated Tax Revenue section.

### ***Travel Throughout the Economic Cycle***

Due to its economic diversity, and in contrast to many other industries, the travel industry is often considered to be relatively resistant to recessions. Although travelers are likely to take shorter trips, less expensive trips, or fewer business trips, historically, they have still traveled enough to keep the travel industry growing during recessionary periods. One recent exception is the recession of 1991-92, which coincided with the Gulf War and its inflating effect on fuel prices. In late-2000, on the other hand, as the overall economy started showing signs of a slow-down, strong consumer confidence and persistent consumer spending contributed to continued growth of the industry. Tourism took a hit as the effects of September 11, 2001 rippled through the economy, but the industry quickly rebounded. Extremely high fuel prices in the summer of 2008, as well as the first effects of the recession hitting the nation's economy, contributed to the first decrease in visitation and nonresident traveler spending in Montana in years.

In the years following a recession, the travel industry has a tendency to lag behind the overall growth rate in the economy. At this point in the economic cycle, leisure travel has to compete with the purchases of durable goods such as refrigerators and television sets--items that consumers have put off buying during the recessionary period. At the same time, consumers are planning for future travel due to improved economic conditions.

The strong economic growth for most of the 1990s benefited Montana as a travel destination, but not to the same degree as other destinations (i.e., Florida, Hawaii, international destinations). Part of this is due to travelers going on once-in-a-lifetime vacations to exotic destinations because of their increased

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incomes and job security. Other travelers simply vacationed more often to the major tourist destinations (resorts, amusement parks, etc.).

The economic downturn of late-2000 through late-2003 had less effect on Montana's travel industry than it did for much of the country. In those more difficult economic times, compounded by the events of September 11, 2001, travelers sought out more affordable domestic destinations and ones they perceived as safe, qualities that Montana could satisfy. Many travelers who might have wanted to visit Montana in the past, but did not make the trip, now had more reasons to visit the state. Likewise, travelers looking for ways to offset the high cost of fuel on their vacations, affecting not only the cost of driving to destinations, but the cost of flying as well, may opt to stay closer to home, drive rather than fly (particularly families), and choose less expensive vacation spots, such as national parks or state parks, over resort vacations or amusement parks.

In addition to the high cost of fuel affecting people's travel decisions, the recession was clearly taking a toll on people's lifestyles by late in 2008, further affecting many of their economic decisions, including whether or not to travel. Travel and tourism decreased nationwide, and Montana did not escape the downward trend during the last two years.

**Table 1: Economic Impacts<sup>1</sup> of Nonresident Travel in Montana, 2009**

Key Measurement	Direct Impact	Indirect Impact	Induced Impact	Total Impact
<b>2008 Impacts (2009\$)</b>				
Total Industry Output <sup>2</sup>	\$1,838,200,000	\$520,900,000	\$424,700,000	\$2,783,900,000
Contribution to Individuals				
Personal Income <sup>3</sup>	\$529,600,000	\$135,300,000	\$124,900,000	\$789,800,000
Employment <sup>4</sup>	23,330	3,760	4,070	31,160
Contribution to Governments				
Federal Taxes	N/A	N/A	N/A	\$168,600,000
State/Local Taxes	N/A	N/A	N/A	\$180,200,000
<b>2009 Impacts</b>				
Total Industry Output <sup>2</sup>	\$1,541,400,000	\$429,600,000	\$357,300,000	\$2,328,300,000
Contribution to Individuals				
Personal Income <sup>3</sup>	\$446,700,000	\$110,000,000	\$104,500,000	\$661,200,000
Employment <sup>4</sup>	19,160	2,980	3,340	25,480
Contribution to Governments				
Federal Taxes	N/A	N/A	N/A	\$141,600,000
State/Local Taxes	N/A	N/A	N/A	\$152,900,000

Source: ITRR.

<sup>1</sup>Definitions: *Direct impacts* result from the purchases of goods and services made by nonresident travelers; *Indirect impacts* result from the purchases made by travel-related businesses (e.g., suppliers); *Induced impacts* result from purchases by those employed in travel-related occupations. The *total impact* is the sum of these impacts.

<sup>2</sup>Industry output is defined as the value of an industry's total production.

<sup>3</sup>Comprises both employee compensation and proprietor income.

<sup>4</sup>Includes full-and part-time annual jobs.

## TRAVEL VOLUME

### *Nonresident Travel in Montana*

- Nonresident travel to Montana, including both pleasure and business travel<sup>6</sup>, decreased in 2009 to just under 10 million individual travelers, which was nearly level with 2008 visitation. Overall, the 2009 figure is a 0.1 percent decrease from 2008 and a 6.0 percent increase over 1999 visitation (Table 2, Figure 1).
- Nonresident travel *groups* (2.44 nonresident travelers per group) increased 0.2 percent from 2008 to 2009 (Table 2, Figure 2). Over the 11-year period from 1999 to 2009, groups of nonresident travelers increased a cumulative 5.2 percent.
- Of the 4,684,000 people who visited Montana during the 3<sup>rd</sup> quarter of 2009 (July-September), 56 percent were here primarily for vacation, and 17 percent were visiting friends or relatives (Figure 3). During 4<sup>th</sup> quarter, 2009 (October-December), 1,423,000 people visited the state, of whom 29 percent were passing through, 24 percent were visiting friends or relatives, and 23 percent were vacationing (Figure 4).

**Table 2: Montana Nonresident Travel Volume, 1999-2009**

Year	Nonresident Visitors	Percent change from previous year	Nonresident Travel Groups	Percent change from previous year
1999	9,428,000	1.6%	3,900,000	1.6%
2000	9,465,000	0.4	3,916,000	0.4
2001	9,552,000	0.9	3,931,000	0.4
2002	9,767,000	2.3	4,009,000	2.0
2003	9,670,000	-1.0	4,177,000	4.2
2004	9,800,000	1.3	4,241,000	1.5
2005	10,126,000	3.3	4,129,000	-2.6
2006	10,378,000	2.5	4,236,000	2.6
2007	10,684,000	2.9	4,360,000	2.9
2008	10,000,000	-6.4	4,092,000	-6.1
2009	9,992,000	-0.1	4,101,000	0.2

Total Increase 1999-2009

564,000

6.0%

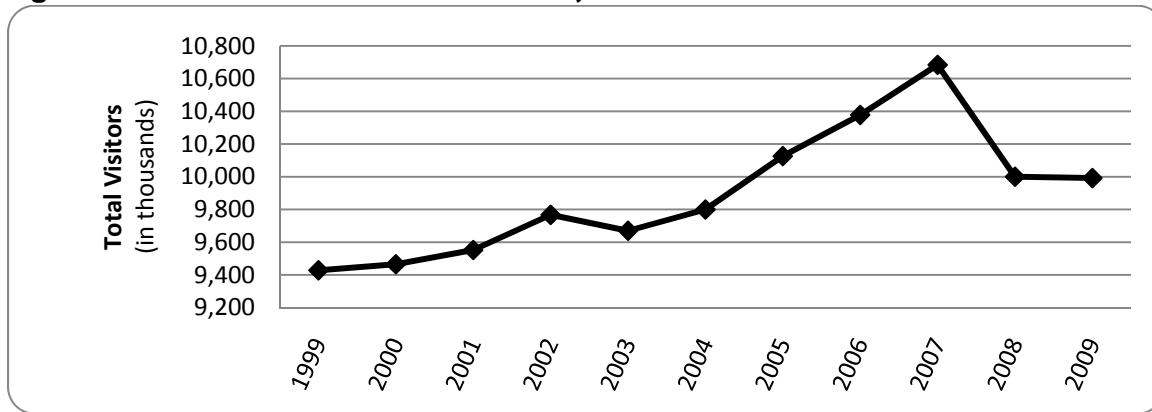
201,000

5.2%

Source: ITRR.

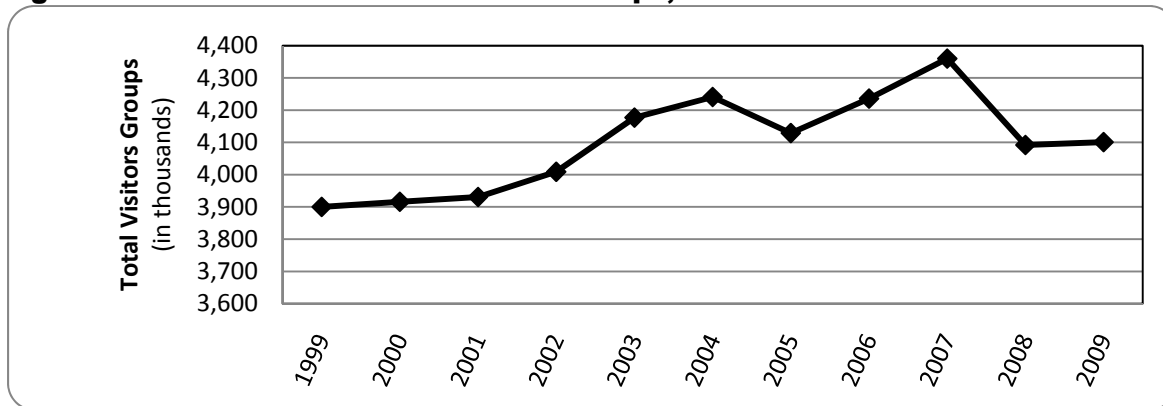
<sup>6</sup> While nonresident travel to Montana includes both pleasure and business travel, excluded from the survey are business vehicles such as semi-trucks, as well as vehicles with state and federal government license plates.

**Figure 1: Montana Nonresident Visitors, 1999-2009**



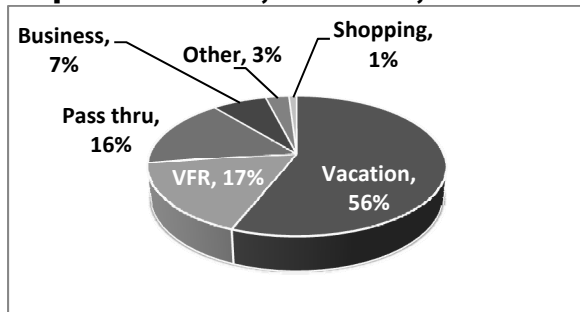
Source: ITRR.

**Figure 2: Montana Nonresident Travel Groups, 1999-2009**



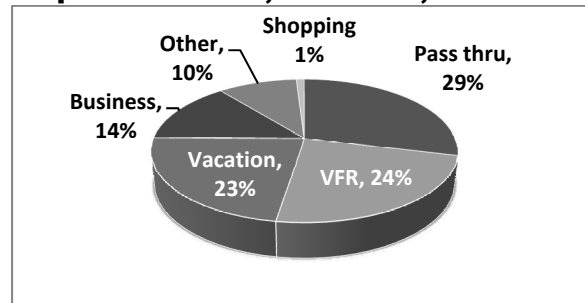
Source: ITRR.

**Figure 3: Montana Nonresident Primary Purpose of Travel, Quarter 3, 2009<sup>1</sup>**



Source: ITRR.

**Figure 4: Montana Nonresident Primary Purpose of Travel, Quarter 4, 2009<sup>1</sup>**



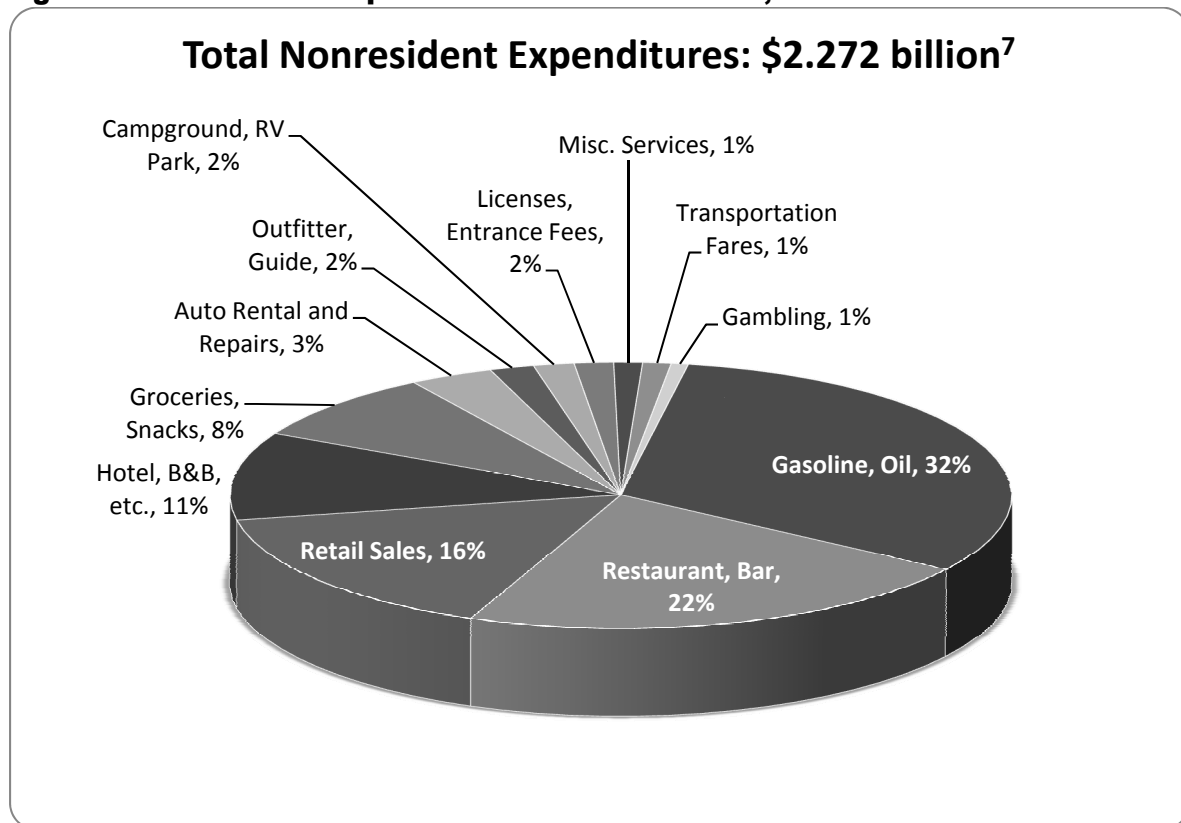
Source: ITRR.

<sup>1</sup>The percentages of nonresidents' primary purpose of travel are based on data collected for Quarters 3 & 4, 2009. A full year of Montana Nonresident Travel Survey data was not collected in 2009.

### ***Nonresident Expenditures in Montana***

- It is estimated that nonresident travelers spent \$2.272 billion<sup>7</sup> on travel-related goods and services in Montana in 2009. The largest spending category was gasoline and oil, accounting for 32 percent of the total, or approximately \$710 million (Figure 5).
- Purchases at restaurants and bars constituted the second-largest spending category, representing 22 percent of the total, or \$498 million.
- Retail sales comprised 16 percent of total expenditures, over \$358 million, while lodging accounted for 11 percent, or over \$240 million.

**Figure 5: Nonresident Expenditures and Distribution, 2009**



Source: ITRR.

Note: Percentages may not add to 100% due to rounding.

<sup>7</sup> 2009 expenditure estimate is based on Q1 & Q2, 2008 expenditure estimates (derived from 2005 spending patterns), adjusted by -18% for changes in the economy, and Q3 & Q4, 2009 estimates.

### ***Nonresident Expenditure Trends***

- Nonresident travel expenditures, including both domestic and international visitors, totaled \$2.272 billion in 2009 (Table 3).
- As of 2008, travel expenditures constituted 7.6 percent of Gross Domestic Product by State.

**Table 3: Nonresident Travel Expenditures and Gross Domestic Product by State, 1999-2009**

<b>Year</b>	<b>Nonresident Travel Expenditures in Montana (millions 2009\$)</b>	<b>% change from previous year</b>	<b>Gross Domestic Product by State<sup>1</sup> (millions 2009\$)</b>	<b>% change from previous year</b>	<b>Nonresident Travel Expenditures as % of GDP by State</b>
1999	\$2,062	1.6%	\$26,276	0.4%	7.8%
2000	\$2,071	0.4	\$26,619	1.3	7.8
2001	\$2,090	0.9	\$27,221	2.3	7.7
2002	\$2,154	3.1	\$28,096	3.2	7.7
2003	\$2,193	1.8	\$29,762	5.9	7.4
2004	\$2,232	1.8	\$31,178	4.8	7.2
2005	\$3,037	N/A <sup>2</sup>	\$32,723	5.0	9.3
2006	\$3,112	2.5	\$33,834	3.4	9.2
2007	\$3,203	2.9	\$35,455	4.8	9.0
2008	\$2,718	-15.2	\$25,763	0.9	7.6
2009	\$2,272	-16.4	N/A	N/A	N/A

Sources: ITRR; U.S. Bureau of Economic Analysis.

<sup>1</sup> "GDP by State" is simply defined by the BEA as "the value added in production by the labor and property located in a state." GDP is a similar concept but at the national level (and includes military expenses abroad). For more detail, see Beemiller et al. 1999.

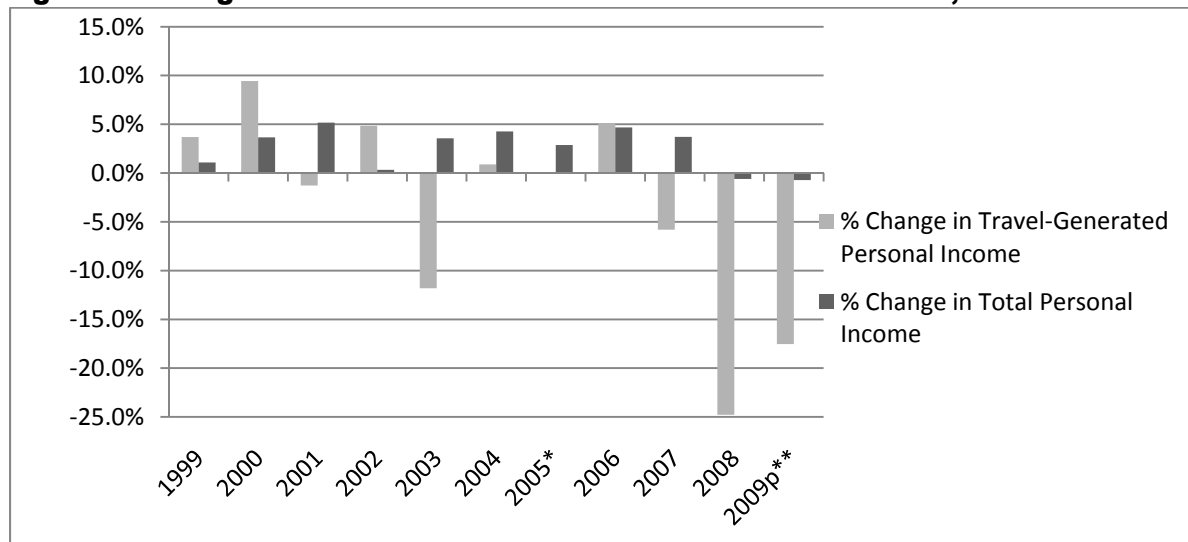
<sup>2</sup> Due to new data in the Institute's Nonresident Visitation Estimation Model and Nonresident Expenditure Estimation Model, the 2005 figure should not be compared to previous years.

## TRAVEL-GENERATED INCOME

Personal income generated from the expenditures of nonresident visitors to Montana is comprised of two categories: employee compensation, which is wages and salary income paid to employees of businesses within the travel industry; and proprietors' income, which is the income of self-employed workers in businesses serving travelers.

- In 2009, total personal income paid by travel-related firms in Montana attributable to nonresident visitor spending totaled over \$660 million (Table 4).
- On average, every dollar spent by nonresident travelers in Montana in 2009 generated 29.8 cents in wage and salary income for Montana residents. The national equivalent is 26.4 cents.<sup>8</sup>
- Personal income generated by nonresident spending in Montana constituted 2.0 percent of Montana residents' total personal income in 2009, compared to 1.6 percent at the national level.<sup>9</sup>
- Figure 6 shows that both total personal income and travel generated income decreased in 2008 and 2009, although the decrease was much more pronounced in travel generated personal income.

**Figure 6: Change in Travel-Generated and Total Personal Income, 1999-2009**



Sources: ITRR; U.S. Bureau of Economic Analysis (SA04).

\*Travel-generated income in 2005 cannot be compared with the previous year due to changes in model data.

\*\*2009 Total personal income preliminary; Travel-generated personal income is based on newly collected nonresident data and new IMPLAN model.

<sup>8</sup> U.S. Travel Association, 2010; 2009 total travel expenditures in the U.S. and travel-generated payroll.

<sup>9</sup> Based on Bureau of Economic Analysis (SA04) and U.S. Travel Association estimates.

**Table 4: Travel-Generated and Total Montana Personal Income, 1999-2009**

Year	Travel-Generated Personal Income (millions 2009\$)	% change from previous year	Total Personal Income (millions 2009\$)	% change from previous year	Travel-Generated Income as % of Total Personal Income
1999	\$862	3.7%	\$25,206	1.1%	3.4%
2000	\$944	9.5	\$25,479	3.7	3.6
2001	\$931	-1.3	\$26,413	5.2	3.4
2002	\$976	4.8	\$27,779	0.3	3.5
2003	\$861	-11.1	\$27,870	3.6	3.0
2004	\$868	0.8	\$28,860	4.3	2.9
2005	\$1,102 <sup>1</sup>	N/A <sup>1</sup>	\$30,091	2.9	3.6
2006	\$1,159	5.2	\$30,954	4.7	3.6
2007	\$1,092	-5.8	\$32,400	3.7	3.2
2008	\$821	-24.8	\$33,602	-0.6	2.5
2009	\$677 <sup>2</sup>	-17.5 <sup>2</sup>	\$33,396	-0.7	2.0

Sources: ITRR; U.S. Bureau of Economic Analysis.

<sup>1</sup>Due to new IMPLAN model data and structural matrices, as well as new data in the Institute's Nonresident Expenditure Estimation Model, the 2005 figure should not be compared to previous years.

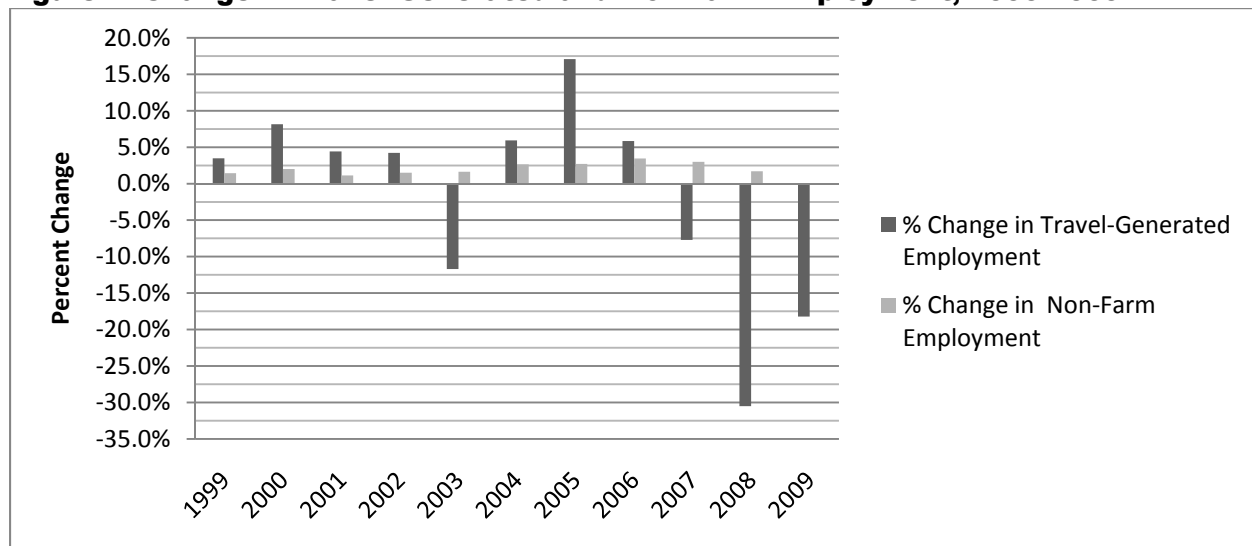
<sup>2</sup>The 2009 figure is based on updated IMPLAN model data and new IMPLAN software. Changes in model data are reflective of changes in Montana's economy, as indicated by economic data recorded by multiple federal agencies.

## TRAVEL-GENERATED EMPLOYMENT

Tourism is not a specifically defined industry, which can make it difficult to gauge the importance of travel to Montana's economy in terms of employment and income. The travel industry is quite diverse, and, therefore, supports a wide variety of jobs throughout the state, both full-time and part-time, year-round and seasonal. Nonresident travel supports jobs in every one of Montana's industry segments (Grau, 2007).

- Travel generated employment has decreased in the past several years, likely due to decreases in visitor spending.
- Because much of the employment in this sector is seasonal and part-time, its labor force is much more flexible than many other industries and can quickly accommodate both strong and weak years.
- In 2009, nonresident expenditures in Montana supported over 25,000 jobs (Table 5). This, unfortunately, is the smallest number of jobs in the past 11 years.
- It is estimated that every \$89,168 spent by nonresident travelers in Montana supports one job. The estimated equivalent figure for the U.S. is \$69,743.<sup>10</sup>

**Figure 7: Change in Travel-Generated and Non-Farm Employment, 1999-2009<sup>1</sup>**



Sources: ITRR; U.S. Bureau of Economic Analysis.

\*BEA 2009 data unavailable

<sup>1</sup>The 2007 figure is based on updated IMPLAN model data. Changes in model data are reflective of changes in Montana's economy, as indicated by economic data recorded by multiple federal agencies.

<sup>10</sup> U.S. Travel Association, 2007; Total travel expenditures divided by travel-generated employment.

**Table 5: Travel-Generated and Total Montana Non-Farm Employment<sup>1</sup>, 1999-2009**

Year	Travel-Generated Employment	% change from previous year	Total Non-Farm Employment	% change from previous year	Travel-Generated Employment as % of Total Non-Farm Employment
1999	35,600	3.5%	511,853	1.4%	6.8%
2000	38,500	8.1	522,147	2.0	7.0
2001	40,200	4.4	528,049	1.1	7.4
2002	41,900	4.2	536,028	1.5	7.6
2003	37,000	-11.7	544,779	1.6	7.8
2004	39,200	5.9	559,193	2.6	6.8
2005	45,900	17.1	574,311	2.7	7.0
2006	48,580	5.8	594,109	3.4	8.0
2007	44,830	-7.7	611,877	3.0	8.2
2008	31,158	-30.5	622,300	1.7	7.3
2009	25,480	-18.2	N/A	N/A	N/A

Sources: ITRR; U.S. Bureau of Economic Analysis.

<sup>1</sup>Employment denotes full-time and part-time jobs.

## MONTANA'S EMPLOYMENT STRUCTURE

### *The Travel Industry's Market Share in Montana*

Over the past several decades, the U.S. economy has shifted considerably away from manufacturing and extractive natural resource industries toward service industries. With advances in technology and the aging of the baby boomer generation, there are new segments of the service industry that did not exist 20 years ago, and other segments, such as health care, are growing rapidly. Table 6 displays the number of jobs in each sector attributed to nonresident travel in the state (estimated using IMPLAN software). Total employment in each sector, after nonresident travel-generated jobs have been accounted for, is displayed in Table 7.

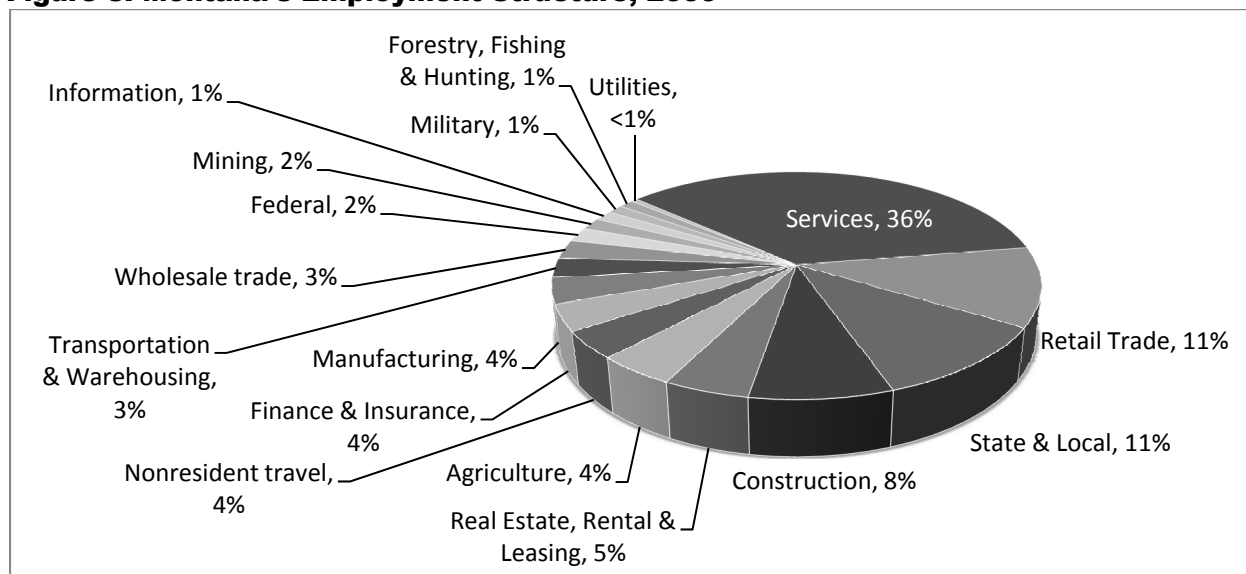
- Nonresident travel-generated jobs amounted to over 25,000 in 2009.
- Nonresident travel accounts for a significant portion, 6.7 percent, of the services sector in Montana (Table 6). It also directly or indirectly accounts for jobs in every other industry sector as well.
- The largest sector of Montana's economy, in terms of employment, is services, accounting for a full 36 percent (Figure 8, Table 7). State and local government employment and retail trade employment each comprise 11 percent of the state's employment.

**Table 6: Employment Attributable to Nonresident Travel, 2009**

Employment Sectors	Total Industry Employment (2008)	Nonresident Travel-Generated Employment (2009)	Nonresident Travel-Generated Employment as % of Total		
Wholesale trade	18,649	1,320	7.1%		
Services	249,800	16,682	6.7		
Retail Trade	76,778	3,860	5.0		
Transportation & Warehousing	18,653	607	3.3		
Real Estate, Rental & Leasing	32,303	766	2.4		
Information	9,367	171	1.8		
Utilities	3,235	52	1.6		
Federal	13,629	208	1.5		
Manufacturing	23,832	324	1.4		
State & Local	72,105	853	1.2		
Agriculture	29,125	263	0.9		
Finance & Insurance	24,623	146	0.6		
Mining	11,024	60	0.5		
Forestry, Fishing & Hunting	7,428	39	0.5		
Construction	52,670	124	0.2		
Military	8,204	0	0.0		
	<b>Total</b>	<b>651,425</b>	<b>25,476<sup>1</sup></b>	<b>Travel jobs as % of total</b>	<b>3.9%</b>

Sources: ITRR; U.S. Bureau of Economic Analysis.

<sup>1</sup> Nonresident travel employment figures are ITRR estimates based on expenditures. Travel is not an isolated industry since activity associated with travel is part of other sectors. ITRR has estimated the impacts of nonresident travel to various sectors and subtracted those impacts from the affected industries' employment figures to avoid double-counting.

**Figure 8: Montana's Employment Structure, 2009**

Sources: ITRR; U.S. Bureau of Economic Analysis.  
 Note: Numbers may not add to 100% due to rounding.

**Table 7: Employment Structure in Montana, 2009<sup>1</sup>**

Employment Sectors <sup>2</sup>	Number of Jobs <sup>2</sup>	% of Total
Services	233,118	35.8%
Retail Trade	72,918	11.2
State & Local	71,252	10.9
Construction	52,546	8.1
Real Estate, Rental & Leasing	31,537	4.8
Agriculture	28,862	4.4
Nonresident travel	25,476	3.9
Finance & Insurance	24,477	3.8
Manufacturing	23,508	3.6
Transportation & Warehousing	18,046	2.8
Wholesale trade	17,329	2.7
Federal	13,421	2.1
Mining	10,964	1.7
Information	9,196	1.4
Military	8,204	1.3
Forestry, Fishing & Hunting	7,389	1.1
Utilities	3,183	0.5
<b>Total</b>	<b>651,425</b>	<b>100.0%</b>

Sources: ITRR; U.S. Bureau of Economic Analysis.

<sup>1</sup>Nonresident travel employment is a 2009 figure, while the remainder of the employment sectors reflect 2008 U.S. BEA data.

<sup>2</sup>Includes both full-time and part-time jobs.

## TRAVEL-GENERATED TAX REVENUE

The travel tax receipts discussed below consist of the federal, state and local tax revenues attributable to nonresident travel spending in Montana<sup>11</sup>. Because Montana does not have a sales tax, the state and local tax receipts generated by nonresident travelers are generally lower than other states. Montana does, however, have a statewide accommodations tax of seven percent on overnight lodging. In addition, nonresident travelers contribute to the tax base through the payment of excise taxes on items such as those on gasoline and alcohol, and by supporting industries that pay corporate taxes and whose workers pay income, property and other taxes.

- Nonresident travel spending in Montana generated nearly \$295 million in revenue for federal, state and local governments in 2009<sup>12</sup> (Table 8).
- In 2007, federal tax revenue attributable to nonresident travel expenditures in Montana exceeded \$141 million, or 5.8 percent of the total Montana federal collections (Table 9).
- At the state and local level, nonresident travel expenditures generated almost \$153 million in tax revenue in 2009, 4.5 percent of the Montana total state and local collections (Table 9).

**Table 8: Travel-Generated Tax Revenue, 2008/2009**

Level of Government	Tax Revenue (2009\$)	Percent of Year's Total
2008 Tax Revenue		
Federal	\$168,600,000	48%
State/Local	\$180,200,000	52%
Total	\$348,800,000	100%
2009 Tax Revenue		
Federal	\$141,600,000	48%
State/Local	\$152,900,000	52%
Total	\$294,500,000	100%

Source: ITRR.

<sup>11</sup> Tax impacts are estimated using the IMPLAN input/output model and include indirect business taxes (property tax, motor vehicle license, duties, and other taxes and fees), personal taxes (income tax, property tax, motor vehicle license, fishing/hunting license, and other fees and fines), social security taxes (employee and employer contributions), corporate profits tax, Montana's Accommodations Tax, alcohol and tobacco taxes, fuel taxes, dividends at federal, state, and local levels, and others.

<sup>12</sup> For further detail on IMPLAN's tax impact estimations, see Olson 1999.

- Comparisons between Montana total tax and the nonresident travel-generated total tax can be difficult. This is mainly due to which Montana total tax figure is being used. Different agencies often use different data collection methods and measurements to fit their specific needs. Unfortunately, these comparisons can show considerable variation in the nonresident travel industry's contribution to Montana's total tax depending on what source is used. In an effort to highlight these differences, two federal and three state and local tax data sources are used for comparison to nonresident travel-generated taxes (Table 9). For further details on these tax figures, refer to Appendix B.
- In 2009, nonresident travelers contributed over \$141 million in federal taxes. This represents 3.4 percent of Montana's total federal tax collections when compared to the Internal Revenue Service (IRS) figure of over \$4.1 billion. However, when compared to the Bureau of Economic Analysis (BEA) total federal tax for Montana, nonresidents' contribution is 5.8 percent of the state's total federal tax revenues. The BEA's total federal taxes are lower than the IRS figures due to the apparent exclusion of corporate taxes, as well as several other components of total IRS collections (See Appendix B).
- Over \$152 million in total state and local taxes are attributable to nonresident travelers. When compared to Census Bureau data, this comprises 4.5 percent of Montana's total state and local tax collections. However, when compared to the Montana Department of Revenue (DOR) and BEA figures, nonresident travel-generated tax contributions are 5.7 and 15.0 percent, respectively, to Montana total state and local taxes. The Census figure of close to \$3.4 billion in total state and local taxes seems to be the most tax-inclusive of the three state and local total tax sources and is likely the most accurate for comparisons with nonresident travel. The Montana DOR total state and local tax is less than the Census figure since it does not account for taxes that go directly to other agencies (i.e. Dept. of Transportation through motor fuel taxes, licensing, permits, etc.; Dept. of Justice through fines, gambling taxes, fees, etc.). The BEA state and local total tax is lower still and appears to be understating total state and local property tax contributions.

**Table 9: Montana and Nonresident Travel-Generated Total Taxes**

Level of Government	Montana Total Tax (2009\$)	Travel-Generated Total Tax <sup>1</sup> (2009\$)	Travel Industry as % of Montana Total
Federal			
IRS report, 2009	\$4,136,011,000	\$141,600,000	3.4%
BEA report, 2008	\$2,441,615,000	\$141,600,000	5.8%
State/Local			
Census report, 2007	\$3,385,052,000	\$152,900,000	4.5%
MT Dept. of Revenue report, 2009 <sup>2</sup>	\$2,685,116,000	\$152,900,000	5.7%
BEA report, 2008	\$1,018,641,000	\$152,900,000	15.0%

Definitions: BEA=U.S. Bureau of Economic Analysis; Census=U.S. Census Bureau; IRS=Internal Revenue Service.

<sup>1</sup>Both federal and state/local tax figures are estimated using the IMPLAN input-output model.

<sup>2</sup>L. Silbaugh, Economist, MT Department of Revenue, personal communication, June 17, 2010.

## TRAVEL INFLATION

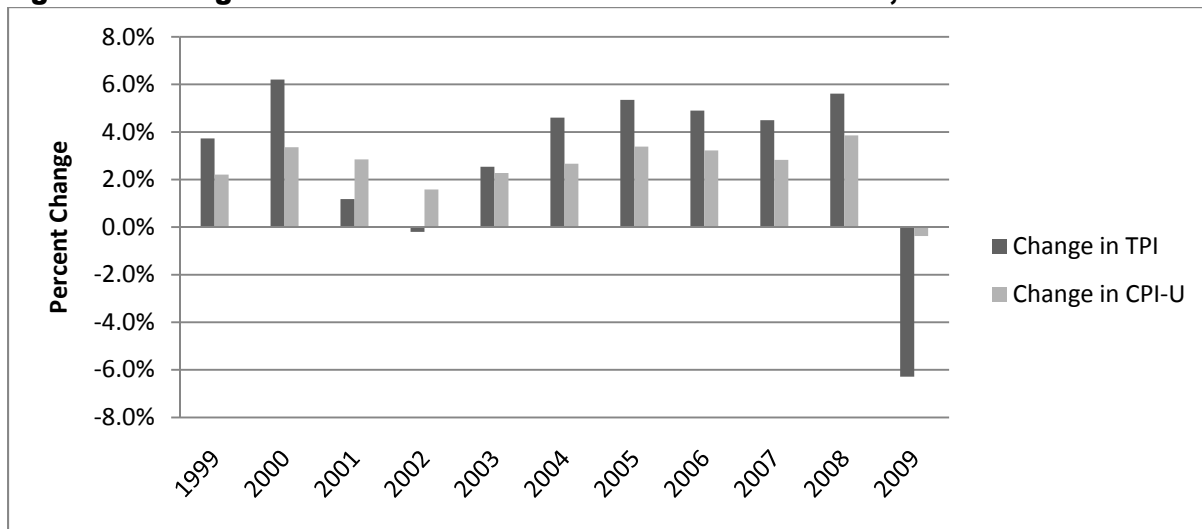
The following section provides information developed by the U.S. Travel Association (USTA), and deals with national conditions rather than conditions specific to Montana. This is due to incomplete or nonexistent information at the state level. USTA has kindly provided permission for reproducing this information.

Demand for travel is highly sensitive to price inflation. When overall consumer prices increase faster than per capita personal income, usually occurring in economic downturns, consumers tend to reduce discretionary spending. This, in turn, can reduce demand for leisure travel while consumers continue to buy necessities. It may be true that Americans still travel during such economic downturns—it seems to be true that many of us consider a yearly vacation to be our right—but it is likely that spending patterns on those vacations change to accommodate tighter budgets or that the traveling which does occur tends to be closer to home and of shorter duration. During periods of economic growth, incomes usually rise faster than prices, and consumers enjoy greater purchasing power for discretionary purchases, including leisure travel.

U.S. Travel Association developed the Travel Price Index (TPI) to measure changes in the cost of travel within the United States. The TPI is based on price data collected by the U.S. Department of Labor for its monthly Consumer Price Index, All Urban Consumers (CPI-U). Because the TPI is based on the CPI series, it is directly comparable to the CPI, but it does not necessarily represent all the discounting which occurs in the pricing structure of airline seats and motel rooms, etc.

- The change in Travel Price Index is generally greater than the change in Consumer Price Index, with just two exceptions in the 11-year period from 1999 through 2009 (Figure 9). These two exceptions, 2001 and 2002, occurred as the travel industry was impacted by the events of September 11, 2001.
- Transportation has been the most influential component of the Travel Price Index in recent years. After significant increases over the past several years, transportation dropped dramatically in 2009, leading to an overall TPI decrease of 6.3 percent. (Table 10).

**Figure 9: Change in Travel Price and Consumer Price Indices, 1999-2009**



Sources: Bureau of Labor Statistics; U.S Travel Association.

**Table 10: Travel Price Index, 1999-2009**

Component (1982-1984=100)	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Transportation	150.5	175.2	172.5	164.7	175.5	187.7	211.7	230.6	242.6	278.1	224.1
Airline Fares	218.8	239.4	239.4	231.6	231.3	227.2	236.6	247.3	251.7	282.0	258.0
Intracity Trans. <sup>1</sup>	172.4	174.9	180.1	184.1	197.4	208.9	218.5	225.9	230.6	239.8	251.1
Intercity Trans. <sup>2</sup>	160.6	156.3	154.4	155.0	150.1	146.4	148.6	154.6	153.9	157.0	148.2
Motor Fuel	100.7	129.3	124.7	116.6	135.8	160.4	195.7	221.0	239.1	279.7	202.0
Out-of-Town Lodging	241.2	252.4	254.0	251.4	252.2	265.3	274.2	285.6	299.9	301.0	279.2
Food and Beverage	166.7	170.7	175.7	180.3	184.2	189.7	195.7	201.9	209.3	218.6	226.1
Recreation Services	197.8	206.7	214.9	221.5	230.4	236.0	241.6	250.0	258.0	264.4	267.8
TPI	183.7	195.1	197.4	197.0	202.0	211.3	222.6	233.5	244.0	257.7	241.5
CPI-U	166.6	172.2	177.1	179.9	184.0	188.9	195.3	201.6	207.3	215.3	214.5
<b>Percent change from previous year</b>											
Transportation	7.3%	16.4%	-1.5%	-4.5%	6.6%	7.0%	12.8%	8.9%	5.2%	14.6%	-19.4%
Airline Fares	6.6	9.4	0.0	-3.3	-0.1	-1.8	4.1	4.5	1.8	12.0	-8.5
Intracity Trans.	-1.0	1.5	3.0	2.2	7.2	5.8	4.6	3.4	2.1	4.0	4.7
Intercity Trans.	0.1	-2.7	-1.2	0.4	-3.2	-2.5	1.5	4.0	-0.5	2.0	-5.6
Motor Fuel	9.2	28.4	-3.6	-6.5	16.5	18.1	22.0	12.9	8.2	17.0	-27.8
Out-of-Town Lodging	2.9	4.6	0.6	-1.0	0.3	5.2	3.4	4.2	5.0	0.4	-7.2
Food and Beverage	2.5	2.4	2.9	2.6	2.2	3.0	3.2	3.2	3.7	4.4	3.4
Recreation Services	4.4	4.5	4.0	3.1	4.0	2.4	2.4	3.5	3.2	2.5	1.3
TPI	3.7	6.2	1.2	-0.2	2.5	4.6	5.3	4.9	4.5	5.6	-6.3
CPI-U	2.2	3.4	2.8	1.6	2.3	2.7	3.4	3.2	2.8	3.9	-0.4

Sources: Bureau of Labor Statistics; U.S Travel Association.

<sup>1</sup>Includes intracity mass transit and taxicabs.<sup>2</sup>Includes intercity bus and rail.



## **Section 2: Montana as a Travel Destination**

### **Montana's Place in National Tourism**

A comparison of Montana's tourism with other states.

### **Montana's Nonresident Vacationer Place of Residence**

An overview of the general and specific areas in which Montana's nonresident vacationers reside and where travelers enter the state.

### **Montana's Nonresident Vacationer Attractions**

Highlights Montana's top attractions, activities, and destinations for nonresidents.

### **Montana State parks**

Compares nonresident and resident visitation to Montana's State parks and Fishing Access Sites.

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## MONTANA'S PLACE IN NATIONAL TOURISM

### *Tourism Receipts as Reflected by U.S. Travel Association Data*

People generally think of places like Florida, California or Las Vegas, Nevada as typical vacation spots in the United States rather than a rural, western state like Montana. Comparing traveler spending per state provides further evidence for this notion. The following data (Table 11) prepared by the U.S. Travel Association (USTA) allows for a comparison between the states. This data from USTA differs from data collected by ITRR. USTA defines travelers as people traveling away from home overnight or traveling 50 miles or more one way from home for a day trip. USTA data is also collected in a different manner and is not comparable to ITRR data. ITRR figures are based on data collected through surveys of nonresident visitors to Montana whereas USTA figures are based on data collected from various federal and proprietary sources.

- In terms of expenditures, California is by far the largest destination state with an influx of tourism dollars exceeding \$99 billion (Table 11). Montana ranked 42<sup>nd</sup> in tourism spending, according to USTA.
- Montana's 42<sup>nd</sup> ranking, totaling \$3,123 in tourism receipts, is similar to those of its bordering states and has been consistent over the years.

**Table 11: Tourist Spending per State, 2008/2005**

U.S. Rank		State	2008 Receipts (millions 2009\$)	% of U.S. Total
2008	2005			
1	1	California	\$99,008	12.9%
2	2	Florida	\$70,271	9.1
3	3	New York	\$53,808	7.0
4	4	Texas	\$50,693	6.6
5	5	Nevada	\$33,946	4.4
6	6	Illinois	\$30,605	4.0
7	7	Pennsylvania	\$21,510	2.8
8	8	Georgia	\$20,791	2.7
9	10	Virginia	\$19,650	2.6
10	9	New Jersey	\$19,378	2.5
42	42	Montana	\$3,123	0.4
		Top 10 State Totals	\$419,660	54.5
		U.S. Total	\$769,786	100.0%

Border State Comparison				
41	41	Idaho	\$3,486	0.5%
44	44	Wyoming	\$2,722	0.4
46	46	South Dakota	\$2,292	0.3
48	50	North Dakota	\$1,919	0.2

Source: U.S. Travel Association, 2010.

- Due to its small population base, Montana fares better in terms of per-capita tourist receipts. While there is still a wide gap between Montana and the big earners (Nevada and Hawaii), Montana ranked 5<sup>th</sup> in 2008, according to USTA, with per-capita tourism receipts of \$3,203 (Table 12).
- The top two states in per-capita receipts were Nevada and Hawaii at an impressive \$12,843 and \$12,236, respectively. Wyoming followed in 3<sup>rd</sup> with per-capita spending of \$5,002. Of the other bordering states, North Dakota and South Dakota were ranked 9<sup>th</sup> and 12<sup>th</sup>, respectively, while Idaho ranked 23<sup>th</sup>.

**Table 12: 2005 Tourist Spending Per-Capita (Top 10 States and Bordering States)**

Rank 2008	State	2009 Population	2008 Per Capita Receipts (2009\$)
1	Nevada	2,643,085	\$12,843
2	Hawaii	1,295,178	\$12,236
3	Wyoming	544,270	\$5,002
4	Florida	18,537,969	\$3,791
<b>5</b>	<b>Montana</b>	<b>974,989</b>	<b>\$3,203</b>
6	Alaska	698,473	\$3,047
7	Vermont	621,760	\$3,027
8	New Mexico	2,009,671	\$2,983
9	North Dakota	646,844	\$2,966
10	Colorado	5,024,748	\$2,889
	United States	307,006,550	\$2,507

**Border State Comparison**

12	South Dakota	812,383	\$2,821
23	Idaho	1,545,801	\$2,255

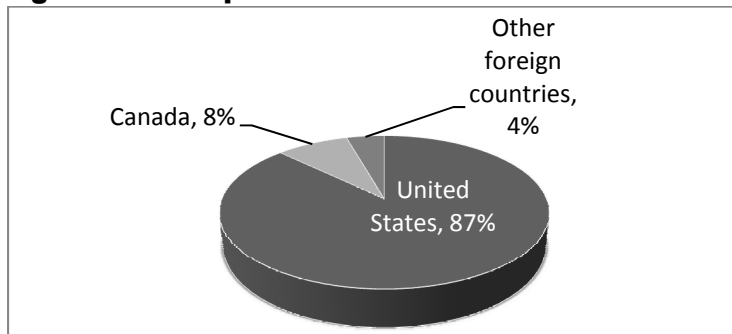
Sources: U.S. Travel Association; U.S. Census Bureau.

## VACATIONER PLACE OF RESIDENCE

Montana's nonresident visitors come from all over the world. Although most visitors are from states nearby, many come from farther away. Of Montana's nonresident visitors, 56 percent came to Montana primarily for vacation in the 3<sup>rd</sup> quarter of 2009. Of those 3<sup>rd</sup> quarter vacationers, 87 percent are from the United States while eight percent are residents in Canada, and four percent come from other foreign countries (Figures 10 & 11). In 4<sup>th</sup> quarter, 2009, 23 percent were in Montana for vacation. Eighty-six percent were U.S. residents, 13 percent were Canadian, and one percent were from other foreign countries.

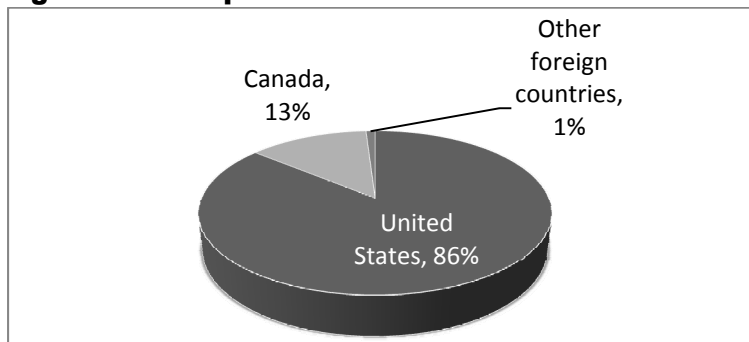
- When looking at nine U.S. regions, it is evident that most Montana visitors come from nearby western states, particularly during 4<sup>th</sup> quarter (Figure 12 & 13). A full 21 percent of visitors came from the pacific region in the 3<sup>rd</sup> quarter, while another 21 percent are from the mountain region. In the 4<sup>th</sup> quarter, 62 percent of vacationers came from the pacific and mountain regions, combined (32% and 30%, respectively).
- When looking at vacationers' state or province of residence, it is clear that many Montana vacationers call a western state home; in both 3<sup>rd</sup> and 4<sup>th</sup> quarters, California was the most frequent state of residence (9.2% and 15.9%, respectively). Idaho and Washington were the second and third most common residences for both 3<sup>rd</sup> and 4<sup>th</sup> quarter as well. (Figure 14 & 15).
- A significant percentage (5.0%) of vacationers to Montana come from Minnesota in the 3<sup>rd</sup> quarter (Figure 14), making it fifth in line of visitor population by state or province of residence. In the 4<sup>th</sup> quarter, a full 9.6 percent of vacationers came from Utah (Figure 15).

**Figure 10: Composition of Montana's Vacationer Population, Quarter 3, 2009**



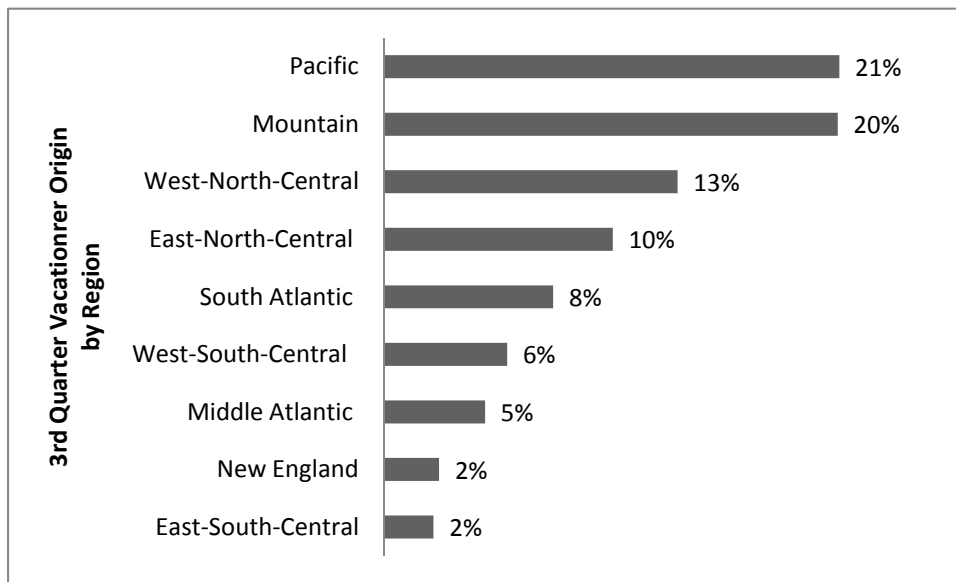
Source: ITRR.

**Figure 11: Composition of Montana's Vacationer Population, Quarter 4, 2009**



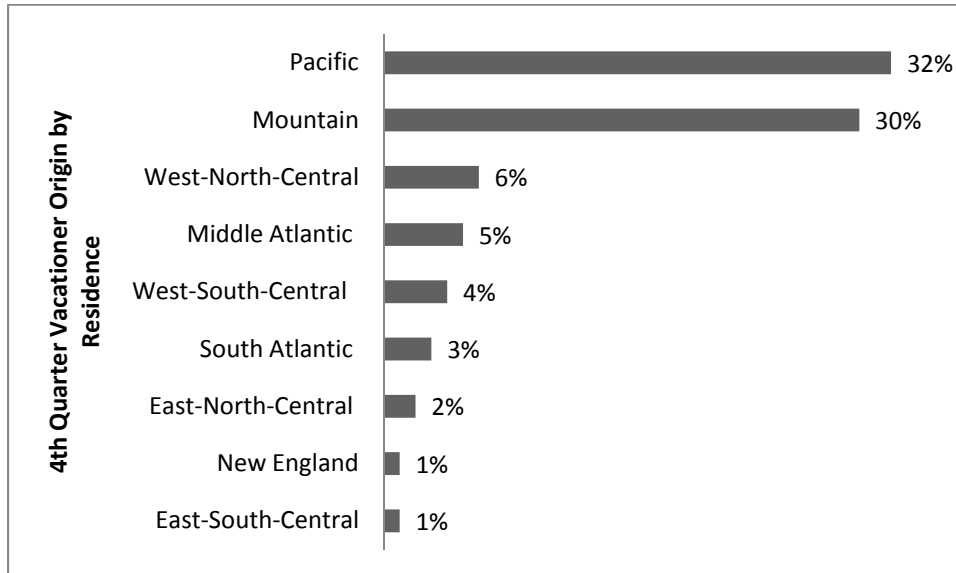
Source: ITRR.

**Figure 12: Vacationer Population by Region<sup>1</sup> of Residence, Quarter 3, 2009**



Source: ITRR.

**Figure 13: Vacationer Population by Region<sup>1</sup> of Residence, Quarter 4, 2009**



Source: ITRR.

<sup>1</sup> The nine regions defined here are the same regions used by Smith Travel Research, a company highly recognized for providing the travel industry with lodging performance data from around the country.

Mountain Region: ID, WY, CO, UT, NV, AZ, NM (this region also includes Montana when utilized by Smith Travel Research)

Pacific Region: AK, WA, OR, CA, HI

West-North-Central Region: MN, ND, SD, IA, NE, MO, KS

East-North-Central Region: MI, WI, IL, IN, OH

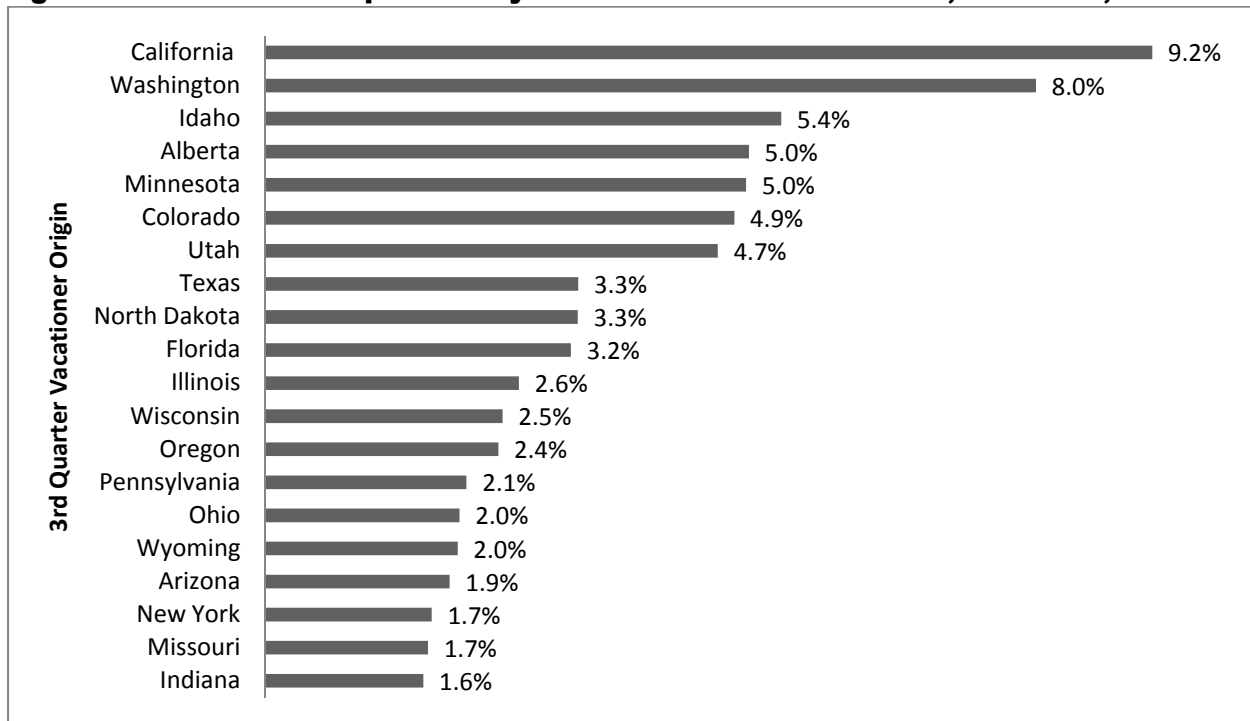
South Atlantic Region: MD, DE, WV, VA, NC, SC, GA, FL, DC

West-South-Central Region: AR, OK, TX, LA

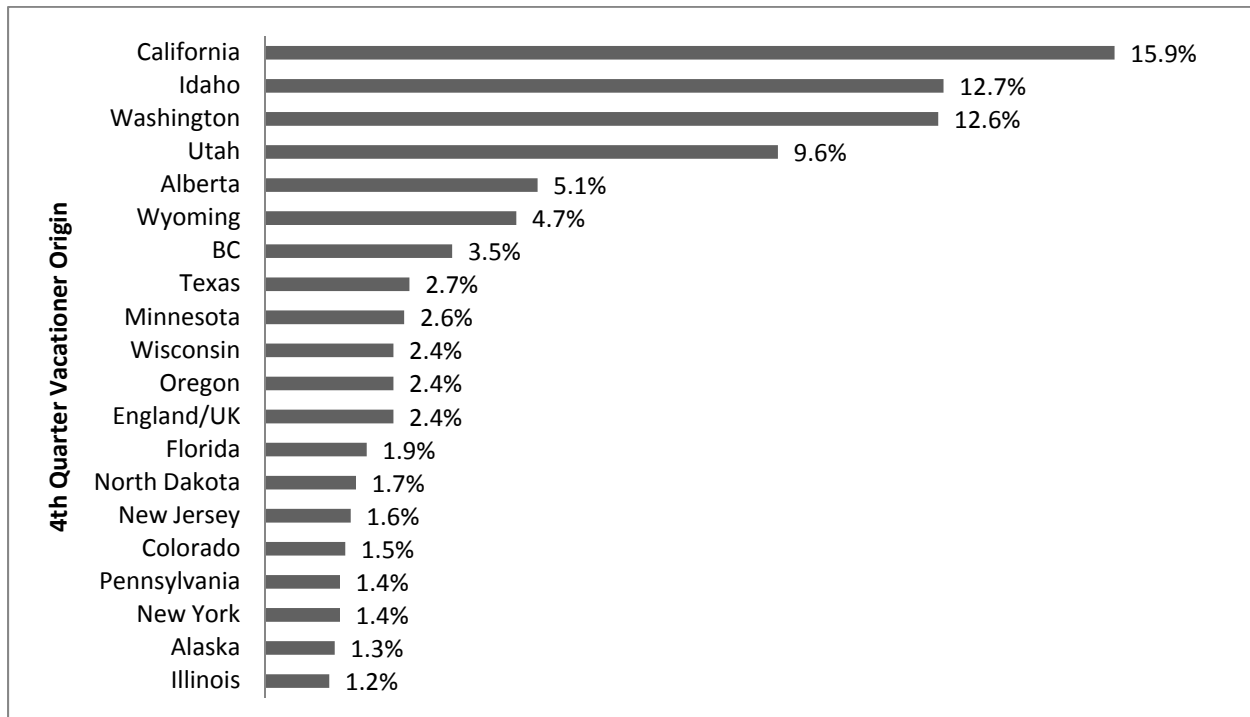
Middle Atlantic Region: NY, PA, NJ

East-South-Central: KY, TN, AL, MS

New England: ME, NH, VT, MA, CT, RI

**Figure 14: Vacationer Population by State/Province of Residence, Quarter 3, 2009**

Source: ITRR.

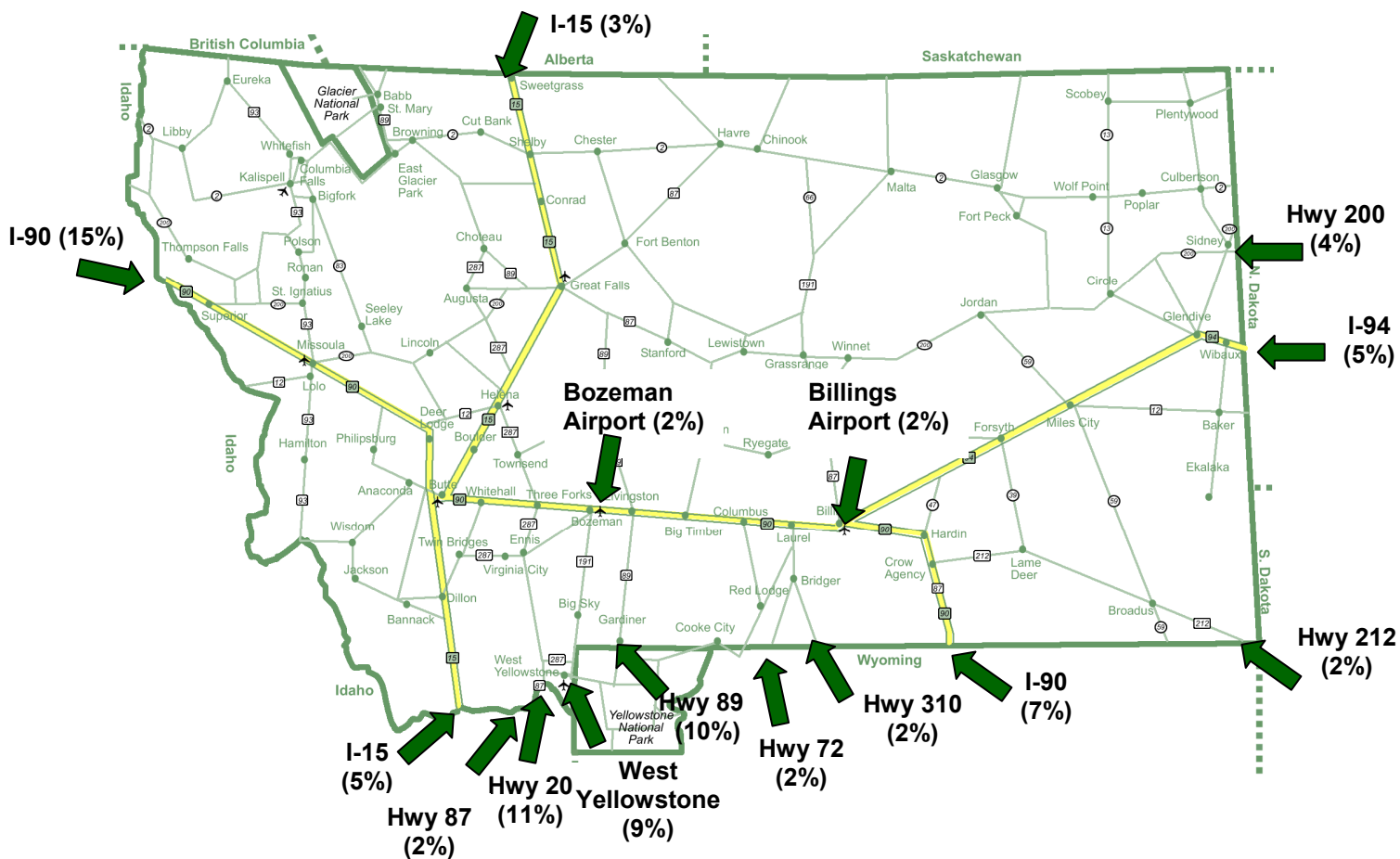
**Figure 15: Vacationer Population by State/Province/Country of Residence, Quarter 4, 2009**

Source: ITRR.

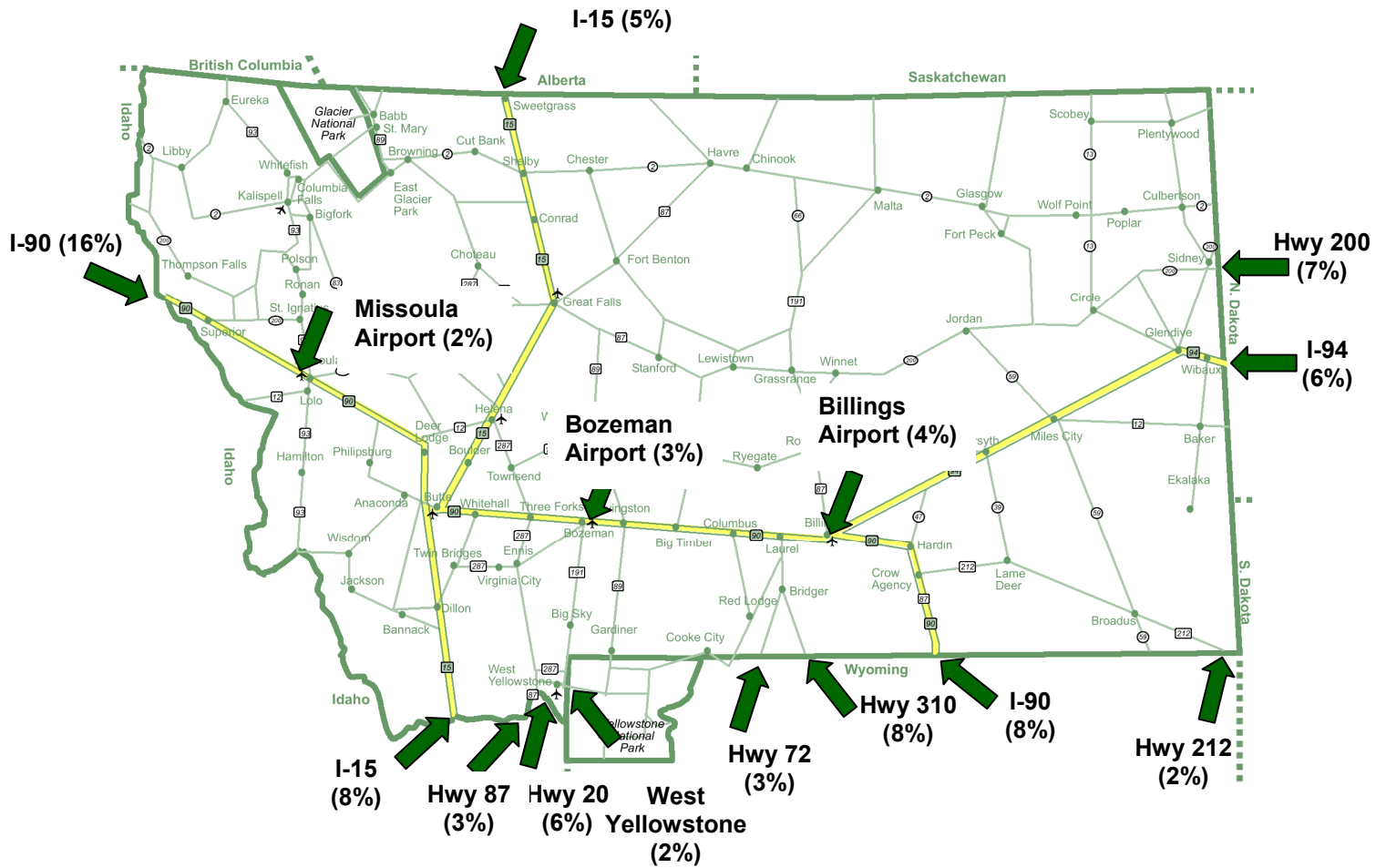
Many of the travelers coming to Montana enter via several well-traveled routes. Many smaller roads are utilized by travelers as entry points to the state as well.

- Over 80 percent of nonresidents arrived in Montana through the top 15 entry points illustrated in Figures 16 and 17 in both quarters 3 and 4. The most frequently used entry point during both quarters was I-90 heading east from Idaho.
- Looking more closely at Figure 16, one can see that 32 percent of nonresidents arrive in Montana via Wyoming (largely through Yellowstone National Park) in quarter 3. Likewise, Figure 17 shows that during 4<sup>th</sup> quarter, 23 percent of nonresident travelers arrive through Wyoming.

**Figure 16: Top 15 Entry Points to Montana by Nonresidents, Quarter 3, 2009**



**Figure 17: Top 15 Entry Points to Montana by Nonresidents, Quarter 4, 2009**



## VACATIONER ATTRACTIONS, ACTIVITIES AND DESTINATIONS

Vacationers cite many reasons for coming to Montana. When surveyed, they are asked to indicate what attracted them to Montana, as well as what activities they engaged in while traveling in the area.

- The majority of vacationers in 3<sup>rd</sup> quarter are drawn to Montana because of the state's mountains and forests or Yellowstone National Park (Table 13). Other attractions for 3<sup>rd</sup> quarter nonresident travelers in Montana for vacation include Glacier National Park, open space and uncrowded areas, wildlife, and rivers and lakes.
- Attractions for vacationers during the 4<sup>th</sup> quarter are quite similar to 3<sup>rd</sup> quarter, although they were reported as attractions with differing frequencies. The two national parks attracted a smaller percentage of vacationers in 4<sup>th</sup> quarter than in the 3<sup>rd</sup>, and, unsurprisingly, hunting attracted quite a few vacationers (27%) in October, November and December (Table 14).
- The most frequently cited activity in both quarters 3 and 4 is scenic driving, with a participation rate of 80 percent and 56 percent, respectively (Table 15 & 16). Wildlife watching is the second most popular activity engaged in by 64 percent and 43 percent of vacationers, respectively. Again, hunting made the list of top ten activities in 4<sup>th</sup> quarter, but not 3<sup>rd</sup> quarter.

**Table 13: Montana's Top 10 Attractions for Vacationers, Quarter 3, 2009**

Rank	Attraction	% who cited item as an attraction <sup>1</sup>
1	Mountains/ Forests	66%
2	Yellowstone National Park <sup>2</sup>	65
3	Glacier National Park	52
4	Open space/Uncrowded areas	51
5	Wildlife	48
6	Rivers	45
7	Lakes	35
8	Fishing	18
9	Lewis & Clark history	18
10	Native American history and culture	13

Source: ITRR.

<sup>1</sup>Respondents could select more than one activity.

<sup>2</sup>Although Yellowstone National Park is primarily located in Wyoming, approximately 65% of park visitors enter the park via a Montana entrance during their trip (NPS 2007).

**Table 14: Montana's Top 10 Attractions for Vacationers, Quarter 4, 2009**

Rank	Attraction	% who cited item as an attraction <sup>1</sup>
1	Mountains/ Forests	54%
2	Open space/Uncrowded areas	49
3	Wildlife	42
4	Rivers	36
5	Yellowstone National Park <sup>2</sup>	35
6	Family/Friends	30
7	Hunting	27
8	Lakes	22
9	Glacier National Park	20
10	Fishing	17

Source: ITRR.

<sup>1</sup>Respondents could select more than one activity.

<sup>2</sup>Although Yellowstone National Park is primarily located in Wyoming, approximately 65% of park visitors enter the park via a Montana entrance during their trip (NPS 2007).

**Table 15: Top 10 Activities for Vacationers to Montana, Quarter 3, 2009**

Rank	Activity	% who indicated participation <sup>1</sup>
1	Scenic driving	80%
2	Wildlife watching	64
3	Nature photography	59
4	Day hiking	51
5	Camping	40
6	Recreational shopping	33
7	Visiting historical sites	31
8	Visiting museums	26
9	Fishing	21
10	Visit Lewis & Clark sites	20

Source: ITRR.

<sup>1</sup>Respondents could select more than one activity

**Table 16: Top 10 Activities for Vacationers to Montana, Quarter 4, 2009**

Rank	Activity	% who indicated participation <sup>1</sup>
1	Scenic driving	56%
2	Wildlife watching	43
3	Day hiking	42
4	Nature photography	40
5	Recreational shopping	30
6	Hunting	28
7	Visiting historical sites	28
8	Fishing	22
9	Camping	20
10	Visiting museums	19

Source: ITRR.

<sup>1</sup>Respondents could select more than one activity.

Montana offers many tourist destinations for travelers to visit. Although these sites do not distinguish between resident and nonresident visitors, it is probably safe to assume that they are visited by all types of travelers regardless of their residence. Some destinations have reliable mechanisms in place for counting their visitors and are included in Table 17, yet many other sites rely on voluntary contributions and guest book sign-ins and are not reported here.

- Besides the highly visited destinations of Yellowstone and Glacier National Parks, Fort Peck Lake receives the most visitors per year (Table 17) with over 430,000 visitors in 2009, which was actually a decrease of 12.2 percent from 2008. The National Bison Range had the biggest increase from 2008 to 2009 (13.7%), followed by Glacier National Park (12.4%) and Cooney Reservoir (7.7%).
- Overall, total visitors to the top 10 destinations in 2009 were up 5.8 percent from 2008.

**Table 17: Montana's Top 10 Tourist Destinations, 2006-2009**

Destination <sup>1</sup>	2006	2007	2008	2009	% change 2006-'07
1 Yellowstone Nat'l Park <sup>2</sup>	1,901,914	2,057,898	2,015,898	2,154,224	6.9%
2 Glacier National Park	1,964,399	2,083,329	1,808,027	2,031,348	12.4
3 Fort Peck Lake	374,270	440,724	489,978	430,393	-12.2
4 Little Bighorn Battlefield	298,518	290,744	282,233	302,811	7.3
5 Giant Springs State Park	263,236	290,594	295,149	301,575	2.2
6 Cooney Reservoir	134,048	158,685	132,844	143,012	7.7
7 Libby Dam	145,628	143,070	129,356	126,512	-2.2
8 Lake Elmo	123,021	150,693	137,034	125,250	-8.6
9 Museum of the Rockies	129,450	185,188	143,963	124,940	-13.2
10 National Bison Range	131,150	116,550	105,500	120,000	13.7
Total	5,465,634	5,917,475	5,539,982	5,860,065	5.8%

Sources: National Park Service; Fort Peck Lake; MT FWP; Museum of the Rockies; Libby Dam; National Bison Range.

<sup>1</sup>Includes only destinations that keep consistent visitation counts.

<sup>2</sup>Figures reflect Yellowstone National Park visitors who entered the park from Montana. Although the park is primarily located in Wyoming, about 65% of the park's visitors travel in Montana during their trip (NPS 2007).

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## **MONTANA STATE PARKS** — CONTRIBUTED BY SUE DALBEY, STATE PARKS PLANNER

Montana state parks hosted a record number of visitors in 2009. The fifty-four state parks received over 2 million visits, or 12 percent more than 2008. Four state parks were acquired in the last two years using Access Montana funding allocated by the Governor and cooperatively purchased for wildlife habitat. These newest sites include: North Shore State Park along Flathead Lake, Les Mason State Park along Whitefish Lake, Marias River State Park southwest of Shelby including 14 miles of river frontage, and Yellowstone River State Park east of Billings including five miles of river frontage.

Residents continue to be the primary users of state parks, with about 83 percent of visits from Montana residents. In 2009, residents accounted for approximately 1.7 million state park visits, while 345,000 nonresidents also visited state parks. About 86 percent of all park visits are day trips and 14 percent of visits are overnight use (284,000 overnight visits).

Over \$3 million was spent on capital improvements in state parks across Montana between July, 2009 and June, 2010 to upgrade roads, stabilize historic buildings and upgrade infrastructure at water based parks. The prior fiscal year, approximately \$3.5 million was expended to improve visitor contact centers and accessibility, improve roads and parking areas, and improve park maintenance facilities. Over \$300,000 was spent on dozens of other major maintenance projects in the last two years.

Money used for various maintenance and improvement projects was a combination of federal funding, parks revenue, and specific ear-marked funding (i.e. fuel taxes). In addition, federal grants totaling over \$500,000 were received to repair historic structures, control weeds and help with forest management.

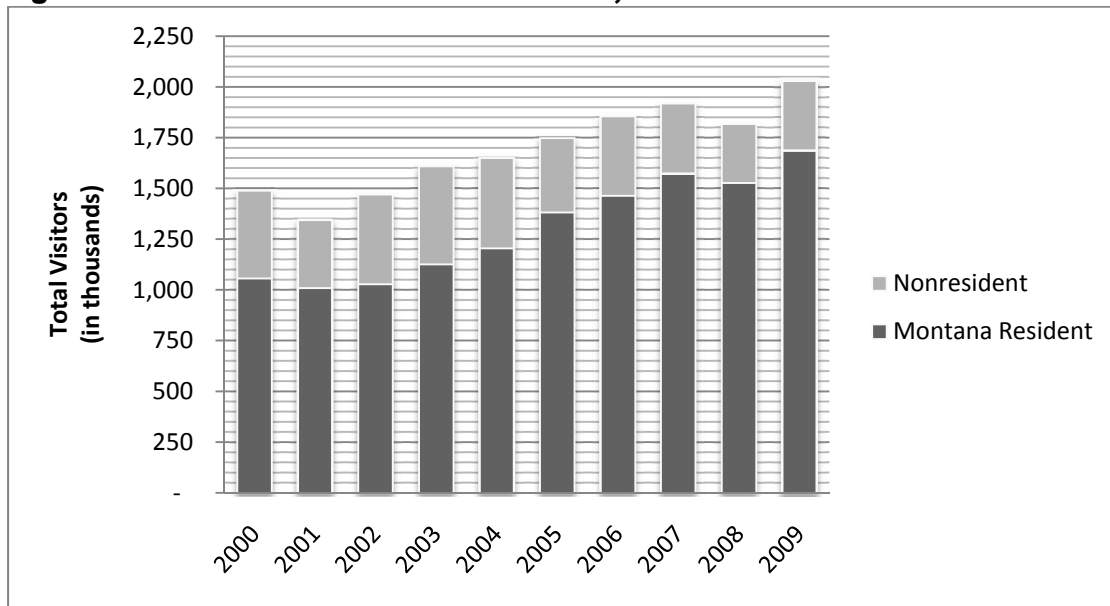
These field projects boost local economies through private employment and material purchases. Additionally, the Parks Division employs over 275 people, of which 85 are full-time, permanent staff.

Visitor feedback indicates they learn about Montana state parks from their time at the park, by using the Fish, Wildlife & Parks website, or by talking with family and friends. Surveys indicate that on average, visitors to water-based state parks bring five people with them, and visit the park four times each year.

In 2009, state park visitors spent an estimated \$291 million in trip-related expenditures across Montana, or an estimated \$16 million more than 2007. Though total visitation to state parks increased, the number of non-resident visits increased only slightly, therefore the estimated economic impact is only slightly higher than 2007 estimates. Nonresidents visiting state parks contributed an estimated \$71.9 million to the economy's total production (or about \$50,000 more than 2007 estimates) in industries such as: petroleum refining and sales, wholesale trade, retail trade, hotels and lodging, and government in Montana communities. Nonresident visitor expenditures contributed about the same personal income as in 2007 (\$20.6 million). This includes wages and salaries paid by employers, and income to self-employed workers. An estimated 1,034 full-time and part-time jobs were generated by nonresident expenditures. These park visitors influence jobs in the lodging industry, automobile service, grocery and retail stores, and recreation services. (Estimates provided are considered conservative and are based on 2009 state parks visitation estimates and per-visitor rates extrapolated from the *2002 Economic Impact Survey of Visitors to Montana's State Parks and Fishing Access Sites* conducted by University of Montana Institute for Tourism and Recreation Research and the Bureau of Business and Economic Research. Estimates for 2009 do not consider inflation. New survey data will be available in late 2010.)

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**Figure 18: Montana State Parks Visitation, 2000-2009**



Source: Montana State Parks.

**Figure 19: Montana Fish, Wildlife and Parks Regions**



**Table 18: State Parks Visitation by Region, 2009**

Region	Number of Parks <sup>1</sup>	Total Visitors	Montana Residents	Nonresidents of Montana	Day Use	Overnight
1-Kalispell	13	417,993	78%	22%	84%	16%
2-Missoula	11	194,048	77	23	80	20
3-Bozeman	10	317,934	82	18	78	22
4-Great Falls	7	373,473	97	3	98	2
5-Billings	6	398,691	83	17	96	4
6-Glasgow	1	4,558	98	2	100	0
7-Miles City	6	227,704	72	28	67	33
<b>Totals/Averages<sup>2</sup></b>	<b>54</b>	<b>2,031,121</b>	<b>83%</b>	<b>17%</b>	<b>86%</b>	<b>14%</b>

Source: Montana State parks.

<sup>1</sup>The number of parks has risen from 42 in 2003 to 50 parks in 2005 due to two additional State parks and a change in status of existing sites. Brush Lake and Tower Rock State parks were added to the system in 2004. Smith River is now managed as a state park rather than multiple fishing access sites. In addition, all parks around Flathead Lake are recognized as six independent parks rather than combined into one park. Four parks were added to the system in 2009: North Shore, Les Mason, Marias River, Yellowstone River State parks.

<sup>2</sup>Visitation figures are adjusted by five percent to account for use at sites with limited data collection equipment, shoulder season use and staff.

**Table 19: State Parks Visitation Estimates: 3-Year Trends**

Region & FWP Office Location	2007	2008	2009	2008-09 % change
<b>1-Kalispell Area</b>	358,046	391,037	417,993	7%
<b>2-Missoula Area</b>	173,908	174,105	194,048	11%
<b>3-Bozeman Area</b>	326,814	287,417	317,934	11%
<b>4-Great Falls Area</b>	355,415	354,650	373,473	5%
<b>5-Billings Area</b>	400,033	352,383	398,691	13%
<b>6-Glasgow Area</b>	5,491	6,210	4,558	-27%
<b>7-Miles City Area</b>	205,858	163,558	227,704	39%
<b>Total</b>	<b>1,916,843</b>	<b>1,815,828</b>	<b>2,031,121</b>	<b>12%</b>

Source: Montana State Parks.

### **Montana State Parks Fishing Access Sites (FAS)**

Montana Fish, Wildlife and Parks, Parks Division, is responsible for managing 332 fishing access sites (FAS) across the state. These sites are parking areas providing water access next to a stream, river or lake. The number of sites has increased from 307 in 2006 due to a statewide emphasis in acquiring public access and funding allocated by the Governor. Over 4.3 million were reported at FAS in 2009, up from 3.5 million visits estimated in 2007. Visitation has increased over the last two years partly due to statewide recreation trends, and improved estimating procedures.

Montana residents are the primary users of FAS. Statewide, about 21 percent of visits are from out-of-state visitors. FWP Region 3, responsible for southwest Montana, manages the highest number of sites and hosts the most FAS visits in the state with nearly 1.4 million annually. This area also receives the highest percentage of nonresident visits, an estimated 32 percent. This high ratio in southwest Montana is likely due to several nationally recognized trout fishing rivers that attract visitors, and the region's proximity to Yellowstone National Park, Idaho and Wyoming.

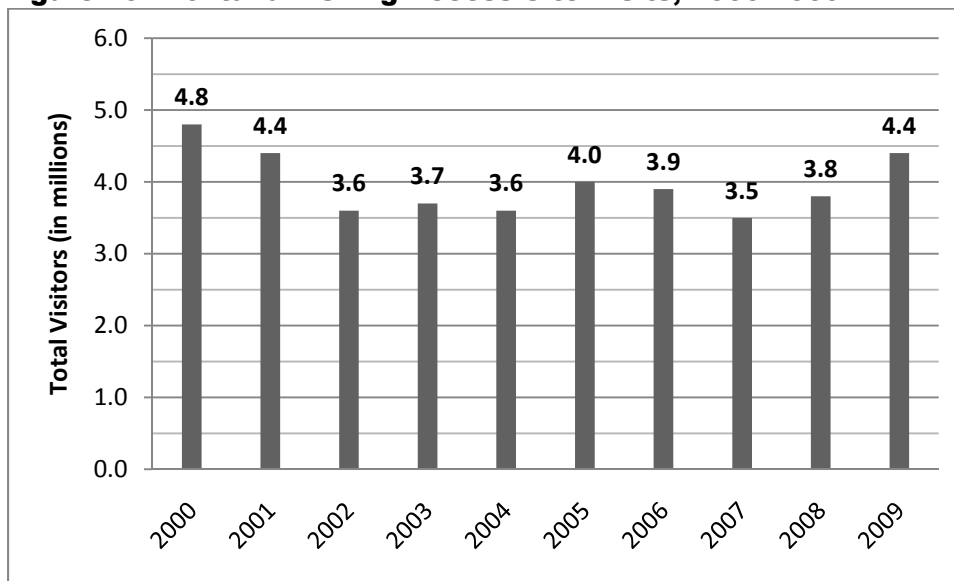
FAS are open to free day use for residents and out-of-state guests alike. About one-third of FAS allow camping; therefore, the percent of visitors camping is quite low.

The visitation estimates shown here provide general use trends. Due to the high number of sites, their wide and remote dispersion, and staffing resources, it is not feasible to collect actual counts at all sites. FWP uses indicator sites to extrapolate region-wide use estimates with low levels of statistical confidence.

**Table 20: Fishing Access Sites Estimated Use by Region, 2007-2009**

Region	Number of FAS	2007 Visits	2008 Visits	2009 Visits	2009 % MT Residents	2009 % Camping
1-Kalispell	32	516,296	430,077	428,717	89%	1%
2-Missoula	72	748,527	858,493	971,187	82%	2%
3-Bozeman	89	1,247,255	1,358,678	1,426,686	68%	1%
4-Great Falls	53	224,163	208,967	209,176	95%	7%
5-Billings	46	511,920	478,680	855,146	79%	17%
6-Glasgow	15	106,600	109,062	129,086	96%	1%
7-Miles City	25	189,583	363,339	336,169	89%	12%
Total	332	3,544,344	3,807,296	4,356,167	79%	6%

Source: Montana State Parks.

**Figure 20: Montana Fishing Access Site Visits, 2000-2009**

Source: Montana State Parks.



### **Section 3: Travel Industry Segment Data**

#### **Montana Transportation Overview**

Time-series data on air and rail service in Montana, including traveler volume, personal income and employment.

#### **Montana Travel Industry Segments**

Hotel, foodservice, and amusement and recreation industry comparisons with time-series data.

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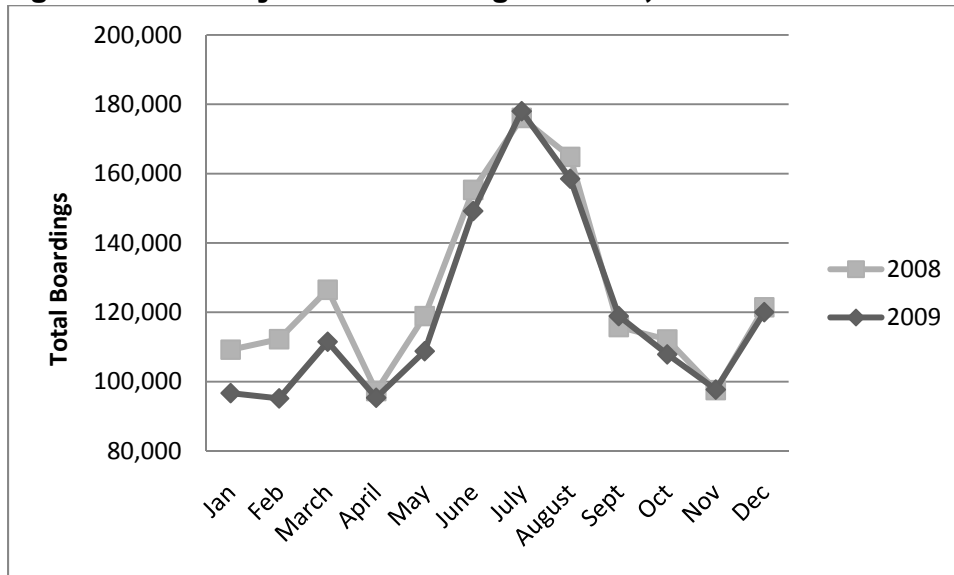
## MONTANA TRANSPORTATION OVERVIEW

### *Airline Performance*

The major airports in Montana include Billings, Bozeman, Butte, Great Falls, Helena, Kalispell, and Missoula. The West Yellowstone airport is reported here as well but it is only open during the months of June through September. These airports record the number of passengers boarding and deboarding at their facility. ITRR uses the deboarding numbers as a count and incorporates them into its estimation model when calculating the number of nonresident travelers at each airport.

- Reported figures of air passenger deboardings throughout the year show that June through August are the busiest months, with July being the most traveled month (Figure 21).
- Great Falls, Helena and West Yellowstone were the only airports to see increases in deboardings in 2009. The Billings airport remains the state's busiest airport in terms of traveler volume (Table 21). Bozeman and Missoula posted the second and third highest passenger deboardings, followed by Kalispell and Great Falls.
- Total passenger deboardings were down 4.6 percent in 2009 after experiencing a 1.7 percent increase from 2007 to 2008 (Table 22). Employment and personal income in the air transportation sector were down significantly in 2008. In 2008, average income per person working in the airline industry in Montana was approximately \$38,943.

**Figure 21: Monthly Airline Passenger Traffic, 2008/2009**



Sources: Montana Aeronautics Division.

**Table 21: Airline Passenger Traffic by Airport, 2002-2009**

Airport	2002	2003	2004	2005	2006	2007	2008	2009
Billings	381,661	372,632	391,206	397,485	398,408	423,493	424,558	395,677
Bozeman	273,026	282,871	310,578	336,803	315,912	335,598	351,281	340,563
Butte	41,059	37,101	38,661	40,117	35,024	34,318	27,479	22,035
Great Falls	128,972	127,228	132,985	155,647	144,450	147,333	149,187	152,682
Helena	74,204	74,387	83,122	92,537	86,687	82,883	85,543	90,255
Kalispell	162,045	165,763	177,089	187,163	174,744	173,576	181,810	155,375
Missoula	237,938	245,956	260,923	263,303	274,804	281,444	283,641	277,265
West Yellowstone	4,026	3,364	2,424	4,294	3,618	3,630	3,847	4,127
Total	1,302,931	1,309,302	1,396,988	1,477,349	1,433,647	1,482,275	1,507,346	1,437,979

Source: Montana Aeronautics Division.

**Table 22: Airline Performance in Montana, 2002-2009**

Key Measurement	2002	2003	2004	2005	2006	2007	2008	2009
Passengers Deboarded	1,302,931	1,309,302	1,396,988	1,477,349	1,433,647	1,482,275	1,507,346	1,437,979
Industry GDP by State <sup>1</sup> (millions 2009\$)	\$53.66	\$69.96	\$65.87	\$63.71	\$65.98	\$70.36	N/A	N/A
Employment <sup>2</sup>	861	864	865	916	936	965	766	N/A
Personal Income <sup>3</sup> (millions 2009\$)	\$35.12	\$36.19	\$34.25	\$35.71	\$36.61	\$38.03	\$29.83	N/A

**Percent change from previous year**

Passengers Deboarded	3.5%	0.5%	6.7%	5.8%	-3.0%	3.4%	1.7%	-4.6%
Industry GDP by State	10.7	30.4	-5.8	-3.3	3.6	6.6	N/A	N/A
Employment	-1.3	0.3	0.1	5.9	2.2	3.1	-20.6	N/A
Personal Income	3.1	3.0	-5.3	4.3	2.5	3.9	-21.6	N/A

Sources: Montana Aeronautics Division; U.S. Bureau of Economic Analysis.

Employment and income figures are for NAICS Sector 481, Air Transportation, which does not include Scenic and Sightseeing Transportation (Sector 487), and Couriers and Messengers (Sector 492).

<sup>1</sup>GDP by State is defined as "... gross output (sales or receipts and other operating income, commodity taxes, and inventory change) minus its intermediate inputs (consumption of goods and services purchased from other U.S. industries or imported)" (Beemiller et al., 1999).

<sup>2</sup>Includes full-time and part-time jobs.

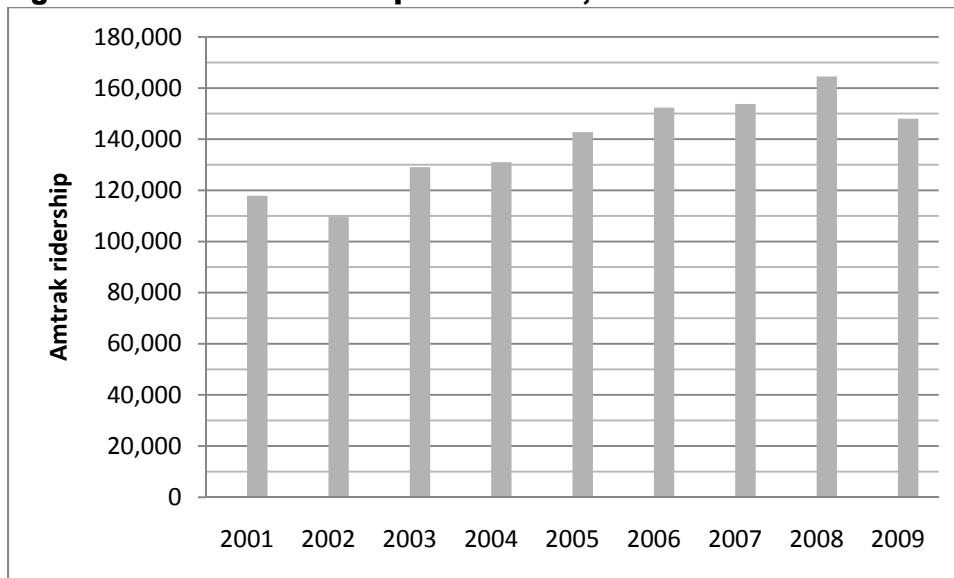
<sup>3</sup>Comprises both employee compensation and proprietors' income.

## ***Amtrak Performance***

Many of Montana's municipalities are connected by various railroad lines, offering excellent rail connections for freight lines. However, passenger transit through the state is limited. The Empire Builder, Amtrak's line in the northern portion of the state, provides the only passenger train service. Stations are located at Browning, Belton, Cut Bank, Essex, Glasgow, Glacier Park, Havre, Libby, Malta, Shelby, Whitefish, and Wolf Point.

- Ridership for 2009 closed with a decrease of 10 percent from 2008, and increased 26 percent from 1999 (Figure 22, Table 23). After reaching a nine-year low in 2002, ridership continued to climb through 2008 before the decrease in ridership in 2009.
- The Whitefish station had the most passenger traffic over the nine-year period and captured 43 percent of all Montana rail traffic (Table 24). The next busiest stations were Havre and Shelby, each with 11 percent. Browning was the slowest Montana station over the period with a passenger traffic allocation of 1.3 percent in 2009.
- Personal income and employment both decreased in the rail transportation industry in 2007 and 2008.

**Figure 22: Amtrak Ridership in Montana, 2001-2009**



Source: Montana Department of Transportation.

**Table 23: Amtrak Performance in Montana, 2001-2009**

Key Measurement	2001	2002	2003	2004	2005	2006	2007	2008	2009
Ridership	117,850	109,550	129,064	130,993	142,783	152,319	153,760	164,551	148,019
Industry GDP by State <sup>1</sup> (millions 2009\$)	\$478.5	\$480.6	\$542.2	\$580.4	\$667.9	\$789.6	\$795.7	N/A	N/A
Employment <sup>2</sup>	2,663	2,581	2,543	2,587	2,782	2,852	2,797	2,756	N/A
Personal Income <sup>3</sup> (millions 2009\$)	\$250.7	\$239.9	\$239.0	\$250.5	\$265.5	\$270.1	\$259.8	\$250.6	N/A
Percent change from previous year									
Ridership	-13.0%	-7.0%	17.8%	1.5%	9.0%	6.7%	0.9%	7.0%	-10.0%
Industry GDP by State	-2.5	0.4	12.8	7.0	15.1	18.2	0.8	N/A	N/A
Employment	-1.6	-3.1	-1.5	1.7	7.5	2.5	-1.9	-1.5	N/A
Personal Income	3.0	-4.3	-0.3	4.8	6.0	1.7	-3.8	-3.5	N/A

Sources: Montana Department of Transportation; U.S. Bureau of Economic Analysis.

Employment and income figures are for NAICS Sector 482, Rail Transportation.

<sup>1</sup>GDP by State is defined as "... gross output (sales or receipts and other operating income, commodity taxes, and inventory change) minus its intermediate inputs (consumption of goods and services purchased from other U.S. industries or imported)" (Beemiller et al., 1999).

<sup>2</sup>Includes full-time and part-time jobs.

<sup>3</sup>Comprises both employee compensation and proprietors' income.

**Table 24: Amtrak Passenger Traffic by Montana Station, 2001-2009**

Station	2001	2002	2003	2004	2005	2006	2007	2008	2009	% of Total, 2009
Browning	1,344	1,087	2,029	1,986	2,287	2,284	2,237	2,202	1,989	1.3%
Belton	3,721	4,124	4,324	4,078	5,100	5,793	6,317	7,473	6,643	4.5
Cut Bank	2,151	2,177	3,033	2,619	2,919	3,014	3,091	3,435	2,991	2.0
Essex	2,949	3,293	3,310	3,742	3,947	3,549	4,712	4,689	4,167	2.8
Glasgow	5,144	4,678	5,422	6,219	6,387	6,255	6,334	6,162	5,934	4.0
Glacier Park	11,086	9,648	9,845	10,123	11,943	11,027	13,663	15,748	13,149	8.9
Havre	13,278	12,472	14,113	14,865	16,064	16,981	16,941	17,674	16,859	11.4
Libby	4,781	4,003	5,276	5,196	5,385	5,569	5,483	5,895	5,628	3.8
Malta	2,874	2,749	2,896	3,103	3,474	3,698	3,775	3,943	3,623	2.4
Shelby	13,504	11,992	14,662	14,483	14,962	16,849	16,894	18,494	16,351	11.0
Whitefish	49,690	46,915	56,708	57,141	62,719	69,386	66,507	70,646	63,345	42.8
Wolf Point	7,328	6,412	7,446	7,438	7,596	7,914	7,806	8,190	7,340	5.0
Total	117,850	109,550	129,064	130,993	142,783	152,319	153,760	164,551	148,019	100.0%

Source: Montana Department of Transportation.

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## **Montana Travel Industry Overview**

### **Hotel Industry**

*Part of the information for this section has been kindly provided by Smith Travel Research.*

Occupancy rates are often considered a measure of the performance of the hotel industry. Yet, occupancy rates also fluctuate based on changes in the room supply-demand relationship. When the growth in room demand exceeds the growth in room supply, occupancy rates increase. Conversely, they decrease when room supply increases faster than room demand, as is the case when the industry experiences a building boom. As a result, the measure of room demand is a better indication of how the hotel industry is changing year to year in terms of occupancy.

- As with many other tourism indicators, room demand decreased in 2008 and 2009. Room supply increased each year in the five year span (Table 25).
- Occupancy rates in Montana decreased over the last three years, beginning with a 0.7 percent decrease in 2007.
- In constant dollars, both average daily rate and room revenues show deviation over time, with both showing decreases in 2009.
- Personal income and employment in the hotel industry increased in all years, although 2009 figures were not available at the time of this publication. In 2008, average income per person in the hotel industry was \$22,639.

**Table 25: Montana Hotel Industry Performance, 2005-2009**

Key Measurement	2005	2006	2007	2008	2009
Occupancy Rate <sup>1</sup>	57.7%	59.7%	60.9%	57.2%	54.0%

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Room Demand (thousands)	5,287	5,507	5,683	5,434	5,192
Room Supply (thousands)	9,156	9,221	9,337	9,503	9,609
Average Daily Rate (2009\$)	\$71.52	\$73.47	\$78.47	\$80.15	\$78.85
Room Revenues (millions 2009\$)	\$378.1	\$404.6	\$445.9	\$435.5	\$409.4
CPI-U	195.3	201.6	207.3	215.3	214.5
Industry GDP by State <sup>2</sup> (millions 2009\$)	391.1	424.6	451.1	N/A	N/A
Employment <sup>3</sup>	11,660	12,244	12,374	12,496	N/A
Personal Income <sup>4</sup> (millions 2009\$)	247.0	253.8	273.9	282.9	N/A

#### Percent change from previous year

Occupancy Rate	3.2%	3.4%	-0.7%	-6.1%	-5.5%
Room Demand	3.5	4.2	3.2	-4.4	-4.5
Room Supply	0.3	0.7	1.3	1.8	1.1
Average Daily Rate	0.8	2.7	6.8	2.1	-1.6
Room Revenues	4.2	7.0	10.2	-2.3	-6.0
CPI-U	3.4	3.2	2.8	3.9	-0.4
Industry GDP by State	4.0	8.6	6.2	N/A	N/A
Employment	0.7	5.0	1.1	1.0	N/A
Personal Income	3.2	2.8	7.9	3.3	N/A

Sources: Smith Travel Research; U.S. Bureau of Economic Analysis.

Employment and income figures are for NAICS Sector 721, Accommodation.

<sup>1</sup> Data on occupancy rate, room demand, room supply, average daily rate and room revenue from Smith Travel Research represents MT hotels/motels with 15 rooms or more rented nightly. It excludes condos, time shares, corporate housing units, apartments, cabins, vacation homes, campgrounds, B&Bs.

<sup>2</sup> GDP by State is defined as "... gross output (sales or receipts and other operating income, commodity taxes, and inventory change) minus its intermediate inputs (consumption of goods and services purchased from other U.S. industries or imported)" (Beemiller et al., 1999).

<sup>3</sup> Includes full-time and part-time jobs.

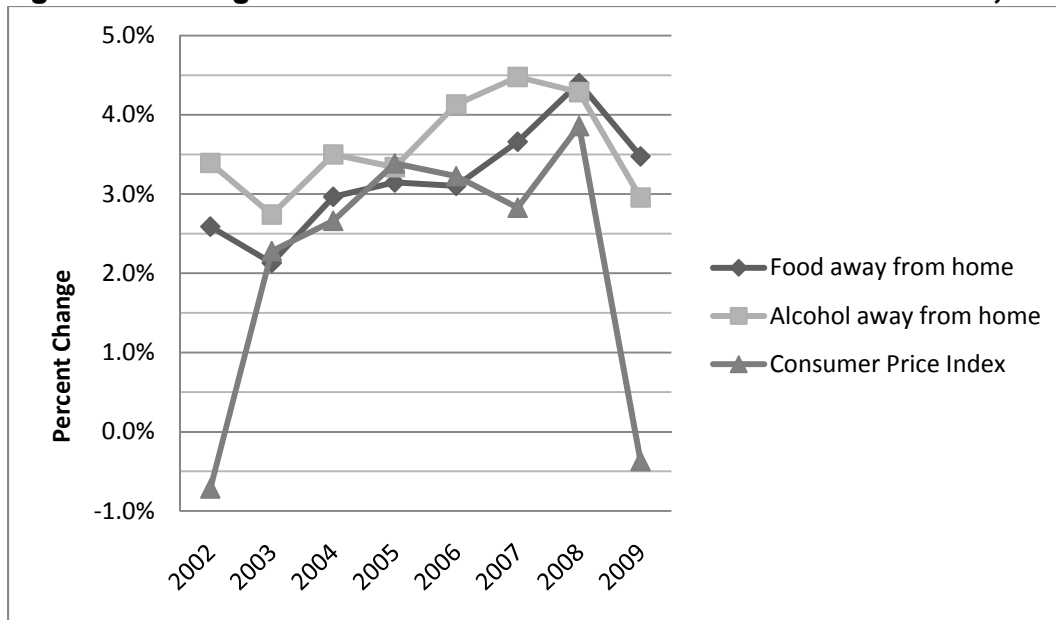
<sup>4</sup> Comprises both employee compensation and proprietors' income.

## Foodservice Industry

The foodservice industry is comprised of eating establishments and drinking places, and is a sizeable component of Montana's travel industry. The following represents aggregate foodservice data, including sales and employment derived from expenditures by both travelers and local patrons.

- The growth in the indices for "food away from home," "alcohol away from home" and the CPI all fluctuated throughout the eight-year period (Figure 23). During five of the eight years (excluding 2002, 2004 and 2007), CPI inflation grew slightly faster than food away from home prices, making dining out slightly less expensive. Inflation of "alcohol away from home" prices increased more quickly than both food away from home and CPI, with the exception of 2000 and 2005 during which CPI inflation outpaced alcohol away from home inflation by a small amount.
- Employment in Montana's foodservice industry experienced an increase each year (Table 26). In 2008, an estimated 39,684 people were employed in the foodservice industry in Montana, up 11.6 percent since 2002.
- Personal income in the foodservice industry experienced small decreases in 2005 and 2008. In 2006, income per person in the foodservice industry was approximately \$14,411.

**Figure 23: Change in Foodservice Price and Consumer Price Indices, 2002-2009**



Sources: Travel Industry Association of America; U.S. Bureau of Economic Analysis.

**Table 26: Montana Foodservice Industry Performance, 2002-2009**

Key Measurement	2002	2003	2004	2005	2006	2007	2008	2009
Price Index (1982-1984=100)								
Food away from home <sup>1</sup>	178.3	182.1	187.5	193.4	199.4	206.7	215.8	223.3
Alcohol away from home <sup>1</sup>	222.5	228.6	236.6	244.5	254.6	266	277.4	285.6
CPI-U	179.9	184	188.9	195.3	201.6	207.3	215.3	214.5
Industry GDP by State <sup>2</sup> (millions 2009\$)	\$649.4	\$681.4	\$691.0	\$715.1	\$752.2	\$649.4	N/A	N/A
Employment <sup>3</sup>	35,572	36,259	37,403	38,156	38,513	38,986	39,684	N/A
Personal Income <sup>4</sup> (millions 2009\$)	\$571.9	\$599.1	\$598.4	\$611.1	\$637.3	\$633.7	\$571.9	N/A
<b>Percent change from previous year</b>								
Price Index								
Food away from home	2.6%	2.1%	3.0%	3.1%	3.1%	3.7%	4.4%	3.5%
Alcohol away from home	3.4	2.7	3.5	3.3	4.1	4.5	4.3	3.0
CPI-U	-0.7	2.3	2.7	3.4	3.2	2.8	3.9	-0.4
Industry GDP by State	5.5	4.1	4.9	1.4	3.5	5.2	N/A	N/A
Employment	1.5	1.9	3.2	2.0	0.9	1.2	1.8	N/A
Personal Income	3.0	4.0	4.8	-0.1	2.1	4.3	-0.6	N/A

Sources: Bureau of Economic Analysis; Travel Industry Association of America.

GDP by State, employment and income figures are for NAICS Sector 722, Food Services and Drinking Places, which includes on-premises and off-premises consumption, and catering services.

<sup>1</sup>Figures are based on data for eating and drinking places, excluding possible effect of institutional and military restaurant services.

<sup>2</sup>GDP by State is defined as "... gross output (sales or receipts and other operating income, commodity taxes, and inventory change) minus its intermediate inputs (consumption of goods and services purchased from other U.S. industries or imported)" (Beemiller et al., 1999).

<sup>3</sup>Includes full-time and part-time jobs.

<sup>4</sup>Comprises both employee compensation and proprietors' income.

## **Arts, Entertainment, and Recreation Services**

The arts, entertainment, and recreation services industry generally includes theatrical productions (except motion pictures), various amusement services and recreation activities. Similar to the foodservice industry, these data include sales and employment derived from the expenditures of both nonresidents and Montana residents.

- The Gross Domestic Product by State (GDP by State) for Montana's amusement and recreation industry increased every year from 2002 to 2007, and then decreased slightly in 2008 (Table 27), although the rate of growth has fluctuated from year to year. The strongest growth was in 2006, with an increase of 10.2 percent.
- Employment in the industry has also continued to rise with a 4.3 percent increase in 2008 over 2007.
- Personal income paid within the arts, entertainment, and recreation services sector has fluctuated more than employment, most recently seeing an increase of 9.3 percent. The average income per person in the industry was approximately \$14,969.

**Table 27: Montana Arts, Entertainment, and Recreation Industry Performance, 2002-2009**

<b>Key Measurement</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>
Industry GDP by State <sup>1</sup> (millions 2007\$)	\$368.5	\$391.8	\$407.7	\$415.2	\$457.6	\$498.7	\$495.2	N/A
Employment <sup>2</sup>	15,034	15,936	16,360	17,044	18,172	19,241	20,061	N/A
Personal Income <sup>3</sup> (millions 2007\$)	\$222.5	\$244.8	\$251.4	\$255.5	\$287.4	\$298.0	\$300.3	\$316.4
<b>Percent change from previous year</b>								
Industry GDP by State	3.8%	6.3%	4.1%	1.8%	10.2%	9.0%	-0.7%	N/A
Employment	7.9	6.0	2.7	4.2	6.6	5.9	4.3	N/A
Personal Income	7.4	10.0	2.7	1.6	12.5	3.7	0.8	5.4

Source: U.S. Bureau of Economic Analysis.

GDP by State, employment, and income figures are for NAICS Sector 71, Arts, Entertainment, and Recreation, which generally includes live performances, exhibits, and participatory recreation activities.

<sup>1</sup>GDP by State is defined as "... gross output (sales or receipts and other operating income, commodity taxes, and inventory change) minus its intermediate inputs (consumption of goods and services purchased from other U.S. industries or imported)" (Beemiller et al., 1999).

<sup>2</sup>Includes full-time and part-time jobs.

<sup>3</sup>Comprises both employee compensation and proprietors' income.

## **CONCLUDING REMARKS**

Nonresident travelers come to Montana for a variety of reasons. As Montana's brand states, Montana has "more spectacular unspoiled nature than anywhere else in the lower 48 United States; vibrant and charming small towns that serve as gateways to the natural wonders; and breathtaking experiences by day, relaxing hospitality at night." Travelers typically leave the state with a very positive impression and quite often become repeat visitors because of their initial Montana experience.

As this review illustrates, nonresident travel impacts many areas of the economy through visitor expenditures, employment opportunities, income generation, and through tax contributions at all levels of government. Montana's travel industry also serves to diversify the state's economy which helps the state allay the effects of the national economic fluctuations.

During the past two years, the travel industry in Montana has seen decreases, just as it has in the entire nation. The number of people traveling has decreased a bit, as has the amount of money spent by those who are traveling. Current reports indicate that the worst of the recession is over, and we can expect to see gradual improvement in the economy. As consumers begin to regain their confidence, we'll see them become more comfortable with traveling again. In turn, we would expect to see the number of travelers in Montana return to pre-recession levels. This recession may encourage people to maintain more conservative spending patterns in the long-term. Whether their conservative spending will continue to carry over into their travel spending or not remains to be seen.

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## Appendix B: Montana Total Tax Tables by Source

The following four tables show the differences in Montana total taxes depending on the tax reporting agency. These are presented here to help the reader see the differences and to assist them in deciding which source is most relevant for their needs. Please note that the following tax figures were inflated to 2007 dollars when reported in the Travel-Generated Tax Revenue section of this report, but are reported in actual dollars here. Lastly, each table indicates the direct source of its tax figures.

### ***U.S. Internal Revenue Service***

**Table 5. Internal Revenue Gross Collections, by Type of Tax and State, Fiscal Year 2009--Montana**  
(thousands of dollars)

Item	2009
Business income tax	\$177,339
Individual income and employment taxes	3,864,272
Income tax not withheld and SECA tax	990,614
Income tax withheld and FICA tax	2,827,815
Railroad retirement tax	18,868
Unemployment insurance tax	16,127
Estate and income trust tax	10,848
Estate tax	40,038
Gift Tax	5,399
Excise tax	48,963
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Total Internal Revenue collections	\$4,136,011

Source: <http://www.irs.gov/taxstats/article/0,,id=206488,00.html>; accessed June 2010.

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**U.S. Bureau of Economic Analysis**
**SA50 Personal current tax receipts—Montana, 2008**

(thousands of dollars)

Item	2008
Personal Income	\$33,515,577
less: Personal current taxes	3,472,619
equals: Disposable personal income	30,042,958
Population (persons)	968,035
Per capita personal income	34,622
Per capita disposable personal income	31,035
Personal current taxes to	
Federal government	2,450,338
Income taxes (net of refunds)	2,450,338
Income taxes (gross)	3,219,179
less: Refunds	768,841
Personal current taxes to	
State government	985,911
Income taxes	885,412
Motor vehicle license	54,845
Other taxes	45,654
Personal current taxes to	
Local government	4,117
Income taxes	0
Motor vehicle license	17
Other taxes	4,100
State and local personal property taxes	32,253
<b>Total personal current taxes<sup>1</sup></b>	<b>\$3,472,619</b>

 Source: [www.bea.gov/bea/regional/spi/action.cfm](http://www.bea.gov/bea/regional/spi/action.cfm); accessed June 2010.

<sup>1</sup>Sum of personal current taxes to federal, state, local governments; plus state and local personal property taxes.

## U.S. Census Bureau

**Table 1: State and Local Government Finances by Level of Government and by State: 2006-2007**

(Thousands of dollars; figures represent only the revenue section of Census Table 1)

Description	State & Local Government Amount	State Government Amount	Local Government Amount
General revenue from own sources	5,122,442	3,377,684	1,744,758
Taxes	3,271,530	2,319,992	951,538
Property	1,106,838	201,825	905,013
Sales and gross receipts	535,350	530,159	5,191
General sales	-	-	-
Selective sales	535,350	530,159	5,191
Motor fuel	210,693	210,693	-
Alcoholic beverage	25,669	25,669	-
Tobacco products	91,470	91,470	-
Public utilities	40,674	40,674	-
Other selective sales	166,844	161,653	5,191
Individual income	832,916	832,916	-
Corporate income	178,707	178,707	-
Motor vehicle license	156,091	150,082	6,009
Other taxes	461,628	426,303	35,325
Charges and misc. general revenue	1,850,912	1,057,692	793,220
Utility revenue	107,950	-	107,950
Liquor store revenue	63,960	63,960	-
Insurance trust revenue	1,873,703	1,873,703	-
Intergovernmental revenue <sup>1</sup>	2,016,761	1,813,956	1,288,286
<b>Total revenue</b>	<b>9,184,816</b>	<b>7,129,303</b>	<b>3,140,994</b>

Source: [www.census.gov/govs/estimate/](http://www.census.gov/govs/estimate/); accessed June 2010.

<sup>1</sup>Due to duplicative intergovernmental transactions, the sum of the state government amount and the local government amount is greater than the state & local government amount. This, in turn, affects total revenue figures.

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**Montana Department of Revenue****State and Local Taxes in Montana, FY2009**

<b>Tax Type</b>	<b>2009</b>
Property	\$1,276,679,181
Income and corporate	981,495,707
Natural resource	172,902,152
Selective sales and other taxes	254,038,791
<hr/>	
Total taxes	\$2,685,115,831

Source: L. Silbaugh, Economist, Montana Department of Revenue, personal communication June 17, 2010. Figures to be included in Biennial Report of the Montana Department of Revenue: July 1, 2008 to June 30, 2010

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